

# Strategy Companion

EXTEND THE POWER OF ANALYTICS TO YOUR ENTIRE ORGANIZATION

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## Roadmap Analyzer 2021

## Report – Enhanced Report Loading Time

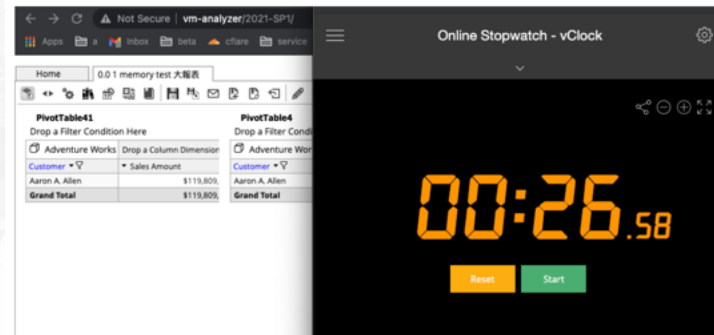
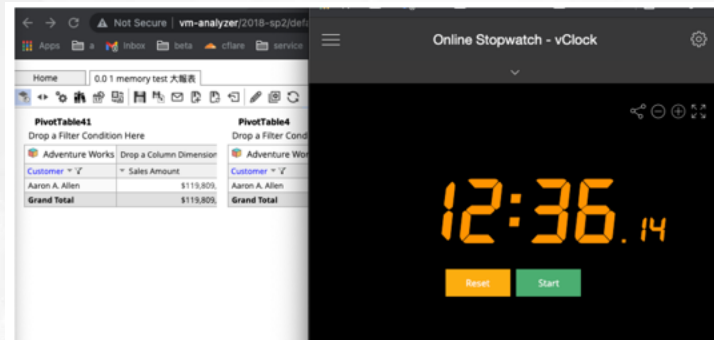
It may take a long time to open a report if the report has a large number of members plus contains many PivotTables with a large amount of data. However, in this version, a memory compression technique is used to improve the operational speed drastically. As an example, a report that took several minutes to open now can open in 26 seconds.

To enable this function, you need to add the following three keys to appSettings

```
<add key="ValidationSettings:UnobtrusiveValidationMode" value="None" />
<add key="AppContext.SetSwitch:Switch.System.Runtime.Serialization.UseNewMaxArraySize" value="true" />
<add key="aspnet:UseTaskFriendlySynchronizationContext" value="false" />
```

Also, verify the red section is added to Web.Config.

```
<?xml version="1.0" encoding="UTF-8"?>
<configuration xmlns="http://schemas.microsoft.com/.NetConfiguration/v2.0">
  <system.web>
    <compilation defaultLanguage="c#" debug="false" />
    <customErrors mode="Off" />
    <identity impersonate="true" />
    <authentication mode="Windows" />
    <authorization>
      <allow users="*" />
    </authorization>
    <sessionState mode="InProc" cookieless="false" timeout="120" />
    <globalization fileEncoding="utf-8" requestEncoding="utf-8" responseEncoding="utf-8" culture="en-US" />
    <httpRuntime maxRequestLength="50000" requestValidationMode="2.0" targetFramework="4.8"/>
    <xhtmlConformance mode="Legacy" />
  </system.web>
  <system.webServer>
    <validation validateIntegratedModeConfiguration="false" />
    <handlers>
      <add path="ChartAxd.axd" verb="*" name="ChartHttpHandler" type="Dundas.Charting.WebControl.ChartHttpHandler" />
      <add path="RenderInterface.axd" verb="*" name="RenderInterface" type="RenderInterface" />
      <add path="RenderBinary.axd" verb="*" name="RenderBinary" type="RenderBinary" />
    </handlers>
  </system.webServer>
</configuration>
```



## Report – Cancel Query Support

While working with a large amount of data, opening a report or executing a PivotTable command may take some time. Whenever it exceeds more than one second, a "Query is Running" dialog is displayed to offer a way to cancel the operation. After canceling, the state will go back to the previous action. If it cannot return to the last activity, the table will return to the top level.

In the past, if the query execution time was too long, the user could not cancel it, which may cause an unsaved report to be scrapped if the user decides to close and restart.

In addition, due to being unable to cancel the running query in the past, even after the front-end Browser is closed, the back-end query is still running, which wastes precious server resources.

Adventure Works		Group ▾									
		Europe					North America				
Category ▾	Subcategory ▾	▼ Sales Amount	▼ Order Quantity	▼ Gross Profit Margin	▼ Gross Profit	▼ Standard Product Cost	▼ Sales Amount	▼ Order Quantity	▼ Gross Profit Margin	▼ Gross Profit	▼ Standard Product Cost
Accessories	Bike Racks	\$62,873.27	857	38.83%	\$24,411.11	\$8,437.44	\$155,816.18	2,086	39.92%	\$62,196.50	\$23,606.88
	Bike Stands	\$10,653.00	67	62.60%	\$6,668.78	\$3,984.22	\$18,603.00	117	62.60%	\$11,645.48	\$6,957.52
	Bottles and Cages	\$18,999.42	3,069	59.73%	\$11,347.89	\$6,550.41	\$33,667.83	5,789	58.54%	\$19,709.88	\$11,259.28
	Cleaners	\$4,426.23	821	44.85%	\$1,985.15	\$874.15	\$11,694.32	2,162	45.03%	\$5,266.05	\$2,357.83
	Fenders	\$8,945.86	407	62.60%	\$5,600.12	\$3,345.74	\$30,530.22	1,389	62.60%	\$19,111.95	\$11,418.27
	Helmets	\$119,717.12	4,420	51.32%	\$61,438.55	\$33,434.96	\$312,483.23	13,508	42.96%	\$134,228.20	\$69,206.68
	Hydration Packs	\$27,876.80	756	44.23%	\$12,328.68	\$4,997.61	\$63,740.80	1,701	45.12%	\$28,757.52	\$12,751.11
	Locks	\$1,785.00	119	31.25%	\$557.81	\$299.06	\$14,440.22	967	30.94%	\$4,468.03	\$2,371.88
	Pumps	\$1,778.89	149	30.93%	\$550.26	\$272.11	\$11,735.79	981	31.07%	\$3,646.57	\$1,929.54
	Tires and Tubes	\$70,921.64	5,440	62.50%	\$44,328.24	\$26,464.92	\$128,730.90	9,259	62.48%	\$80,424.90	\$48,000.23
Accessories Subtotal		\$327,977.23	16,105	51.59%	\$169,216.58	\$88,660.64	\$781,442.50	37,959	47.28%	\$369,455.08	\$189,859.22
Bikes	Mountain Bikes	\$5,506,552.01	4,126	28.91%	\$1,592,143.56	\$2,393,551.06	\$27,966,136.93	22,765	10.87%	\$3,039,959.00	\$9,086,759.44
	Road Bikes	\$7,146,798.45	6,321	20.45%	\$1,461,440.60	\$5,685,357.85	\$31,598,384.16	8,150	3.15%	\$998,384.16	\$12,613,982.47
	Touring Bikes	\$4,501,010.77	4,693	2.32%	\$104,480.57	\$4,396,530.20	\$18,104,480.57	4,693	1.60%	\$121,433.41	\$3,361,377.84
Bikes Subtotal		\$17,154,361.22	15,140	18.41%	\$3,158,064.74	\$8,075,382.61	\$67,669,001.66	35,608	5.82%	\$3,916,909.75	\$25,062,119.75
Clothing	Bib-Shorts	\$19,582.69	365	30.81%	\$6,033.56	\$13,549.13	\$9,999.63	8,180	0.73%	\$45,223.03	\$24,759.64
	Caps	\$12,682.44	1,830	3.33%	\$422.55	\$12,259.89	\$334,983.02	4,624	6.43%	\$123,738.85	\$52,684.45
	Gloves	\$41,637.63	2,323	38.32%	\$15,955.94	\$25,681.69	\$25,690.19	4,069	2.32%	\$61,852.31	\$28,874.95
	Jerseys	\$171,102.36	4,970	-13.17%	(\$22,530.36)	\$193,632.72	\$169,722.75	4,427	4.06%	\$73,141.47	\$170,960.54
	Shorts	\$62,889.75	1,515	37.57%	\$23,624.58	\$39,265.17	\$180,095.35	4,069	30.11%	\$54,227.35	\$26,602.72
	Socks	\$3,048.06	481	46.94%	\$1,430.79	\$1,617.27	\$169,722.75	4,427	38.05%	\$64,585.93	\$22,086.57
	Tights	\$21,737.65	493	29.84%	\$6,487.49	\$15,250.16	\$180,095.35	4,069	30.11%	\$54,227.35	\$26,602.72
	Vests	\$68,700.00	1,820	37.08%	\$25,476.82	\$43,223.18	\$169,722.75	4,427	38.05%	\$64,585.93	\$22,086.57

Query is running

Cancel

# PivotTable - Group by measure

Single Measure Mode

☐ Single Measure Mode

☒ Group by Measure

The new Group by Measure option allows grouping of the same measure for easy comparison under different members. The Group by Measure feature supports both measures on column or row, and it also works well with calculated expressions and the new Subtotal or Grand Total First features.

## PivotTable1

Drop a Filter Condition Here

Adventure Works		Group   Country																
		Grand Total	Europe	North America	Canada	United States	Pacific	Grand Total	Europe	North America	Canada	United States	Pacific	Grand Total	Europe	North America	Canada	United States
Category	Subcategory	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Order Quantity	▼ Order Quantity	▼ Order Quantity	▼ Order Quantity	▼ Order Quantity	▼ Order Quantity	▼ Gross Profit Margin	▼ Gross Profit Margin	▼ Gross Profit Margin	▼ Gross Profit Margin	▼ Gross Profit Margin
Grand Total		\$109,809,274.20	\$19,800,577.06	\$79,353,361.18	\$16,355,770.46	\$62,997,590.72	\$10,655,335.96	274,776	53,010	203,473	49,381	154,092	18,293	11.43%	17.79%	6.87%	6.16%	7.0%
Accessories		\$1,272,057.89	\$327,977.23	\$781,442.50	\$221,505.20	\$559,937.30	\$162,638.16	61,931	16,105	37,959	10,763	27,196	7,867	49.88%	51.59%	47.28%	47.57%	47.1%
	Bike Racks	\$237,096.16	\$62,873.27	\$155,816.18	\$44,575.67	\$111,240.52	\$18,406.70	3,166	857	2,086	594	1,492	223	40.07%	38.83%	39.92%	40.19%	39.8
	Bike Stands	\$39,591.00	\$10,653.00	\$18,603.00	\$5,088.00	\$13,515.00	\$10,335.00	249	67	117	32	85	65	62.60%	62.60%	62.60%	62.60%	62.6
	Bottles and Cages	\$64,274.79	\$18,999.42	\$33,667.83	\$9,041.85	\$24,625.98	\$11,607.54	10,552	3,069	5,789	1,556	4,233	1,694	59.48%	59.73%	58.54%	58.48%	58.5
	Cleaners	\$18,406.97	\$4,426.23	\$11,694.32	\$3,268.60	\$8,425.73	\$2,286.42	3,319	821	2,162	594	1,568	336	46.39%	44.85%	45.03%	45.97%	44.6
	Fenders	\$46,619.58	\$8,945.86	\$30,530.22	\$8,792.00	\$21,738.22	\$7,143.50	2,121	407	1,389	400	989	325	62.60%	62.60%	62.60%	62.60%	62.6
	Helmets	\$484,048.53	\$119,717.12	\$312,483.23	\$85,366.83	\$227,116.40	\$51,848.18	19,541	4,420	13,508	3,685	9,823	1,613	46.77%	51.32%	42.96%	42.98%	42.9
	Hydration Packs	\$105,826.42	\$27,876.80	\$63,740.80	\$18,527.03	\$45,213.76	\$14,208.82	2,761	756	1,701	496	1,205	304	46.34%	44.23%	45.12%	44.94%	45.1
	Locks	\$16,225.22	\$1,785.00	\$14,440.22	\$4,210.24	\$10,229.98	-	1,086	119	967	283	684	-	30.98%	31.25%	30.94%	30.68%	31.0
	Pumps	\$13,514.69	\$1,778.89	\$11,735.79	\$3,135.48	\$8,600.31	-	1,130	149	981	262	719	-	31.05%	30.93%	31.07%	31.10%	31.0
	Tires and Tubes	\$246,454.53	\$70,921.64	\$128,730.90	\$39,499.51	\$89,231.39	\$46,801.99	18,006	5,440	9,259	2,861	6,398	3,307	62.51%	62.50%	62.48%	62.49%	62.4
Bikes		\$94,620,526.21	\$17,154,361.22	\$67,290,294.25	\$13,457,682.99	\$53,832,611.26	\$10,175,870.74	90,220	15,140	69,052	14,414	54,638	6,028	11.11%	18.41%	5.82%	4.68%	6.1
	Mountain Bikes	\$36,445,443.94	\$5,506,552.01	\$27,966,136.93	\$5,338,237.22	\$22,627,899.72	\$2,972,755.00	28,321	4,126	22,765	4,596	18,169	1,430	16.28%	28.91%	10.87%	9.89%	11.1
	Road Bikes	\$43,878,791.00	\$7,146,798.45	\$31,724,512.12	\$6,649,827.43	\$25,074,684.68	\$5,007,480.44	47,148	6,321	38,222	8,198	30,024	2,605	9.95%	20.45%	3.15%	2.18%	3.4
	Touring Bikes	\$14,296,291.27	\$4,501,010.77	\$7,599,645.20	\$1,469,618.34	\$6,130,026.86	\$2,195,635.30	14,751	4,693	8,065	1,620	6,445	1,993	1.52%	2.32%	-1.60%	-2.96%	-1.2
Clothing		\$2,117,613.45	\$401,380.58	\$1,603,057.11	\$432,112.25	\$1,170,944.86	\$113,175.75	73,598	13,797	56,422	14,808	41,614	3,379	17.42%	14.18%	17.74%	17.80%	17.7



# PivotTable –Subtotal First for Row and Column

Newly added Sub-Total First for Row and Column that displays the total values for the parent-child in a more concise manner. Also now works with a report with multiple pages.

× Display Totals

Subtotals

☒ Rows

☒ Columns

☒ Subtotal first

☒ Subtotal first

▼ PivotTable1

Drop a Filter Condition Here

		Group ▼ Country ▼ Region ▼															
Adventure Works		Europe	France	Germany	United Kingdom	North America	Canada	United States						Pacific	Australia	Grand Total	
Category ▼	Subcategory ▼	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	▼ Sales Amount	
Accessories		\$327,977.23	\$111,438.51	\$97,315.66	\$119,223.07	\$781,442.50	\$221,505.20	\$559,937.30	\$46,296.64	\$51,001.72	\$163,069.77	\$45,749.33	\$253,819.85	\$162,638.16	\$162,638.16	\$1,272,057.89	
	Bike Racks	\$62,873.27	\$24,426.62	\$18,105.98	\$20,340.66	\$155,816.18	\$44,575.67	\$111,240.52	\$14,160.50	\$16,616.10	\$24,412.40	\$14,657.39	\$41,394.12	\$18,406.70	\$18,406.70	\$237,096.16	
	Bike Stands	\$10,653.00	\$3,021.00	\$3,180.00	\$4,452.00	\$18,603.00	\$5,088.00	\$13,515.00	-	-	\$5,724.00	-	\$7,791.00	\$10,335.00	\$10,335.00	\$39,591.00	
	Bottles and Cages	\$18,999.42	\$5,621.21	\$6,216.15	\$7,162.06	\$33,667.83	\$9,041.85	\$24,625.98	\$624.86	\$719.75	\$9,429.85	\$582.93	\$13,268.60	\$11,607.54	\$11,607.54	\$64,274.79	
	Cleaners	\$4,426.23	\$1,459.58	\$1,378.69	\$1,587.97	\$11,694.32	\$3,268.60	\$8,425.73	\$816.17	\$1,110.60	\$2,407.19	\$859.49	\$3,232.29	\$2,286.42	\$2,286.42	\$18,406.97	
	Fenders	\$8,945.86	\$2,241.96	\$3,538.78	\$3,165.12	\$30,530.22	\$8,792.00	\$21,738.22	\$21.98	\$21.98	\$9,187.64	\$65.94	\$12,440.68	\$7,143.50	\$7,143.50	\$46,619.58	
	Helmets	\$119,717.12	\$40,033.00	\$34,803.62	\$44,880.50	\$312,483.23	\$85,366.83	\$227,116.40	\$23,039.45	\$23,262.54	\$58,595.21	\$23,226.87	\$98,992.33	\$51,848.18	\$51,848.18	\$484,048.53	
	Hydration Packs	\$27,876.80	\$8,829.00	\$9,140.49	\$9,907.31	\$63,740.80	\$18,527.03	\$45,213.76	\$4,666.03	\$6,089.54	\$11,454.64	\$3,865.47	\$19,138.08	\$14,208.82	\$14,208.82	\$105,826.42	
	Locks	\$1,785.00	\$1,050.00	-	\$735.00	\$14,440.22	\$4,210.24	\$10,229.98	\$1,620.00	\$1,455.00	\$1,560.00	\$1,295.52	\$4,299.46	-	-	\$16,225.22	
	Pumps	\$1,778.89	\$1,071.25	-	\$707.65	\$11,735.79	\$3,135.48	\$8,600.31	\$1,163.42	\$1,487.26	\$1,359.10	\$947.53	\$3,643.01	-	-	\$13,514.69	
	Tires and Tubes	\$70,921.64	\$23,684.89	\$20,951.94	\$26,284.80	\$128,730.90	\$39,499.51	\$89,231.39	\$184.23	\$238.95	\$38,939.73	\$248.21	\$49,620.27	\$46,801.99	\$46,801.99	\$246,454.53	
Bikes		\$17,154,361.22	\$6,114,241.36	\$4,351,530.00	\$6,688,589.87	\$67,290,294.25	\$13,457,682.99	\$53,832,611.26	\$6,761,069.95	\$5,675,571.16	\$13,882,022.99	\$6,710,273.22	\$20,803,673.94	\$10,175,870.74	\$10,175,870.74	\$94,620,526.21	
	Mountain Bikes	\$5,506,552.01	\$1,911,750.69	\$1,197,672.61	\$2,397,128.71	\$27,966,136.93	\$5,338,237.22	\$22,627,899.72	\$2,889,550.49	\$1,573,564.55	\$7,211,753.84	\$3,332,081.89	\$7,620,948.95	\$2,972,755.00	\$2,972,755.00	\$36,445,443.94	
	Road Bikes	\$7,146,798.45	\$2,705,376.99	\$1,554,876.63	\$2,886,544.83	\$31,724,512.12	\$6,649,827.43	\$25,074,684.68	\$3,486,300.17	\$3,603,841.86	\$4,394,959.21	\$2,839,376.75	\$10,750,206.69	\$5,007,480.44	\$5,007,480.44	\$43,878,791.00	
	Touring Bikes	\$4,501,010.77	\$1,497,113.68	\$1,598,980.76	\$1,404,916.33	\$7,599,645.20	\$1,469,618.34	\$6,130,026.86	\$385,219.29	\$498,164.76	\$2,275,309.94	\$538,814.58	\$2,432,518.29	\$2,195,635.30	\$2,195,635.30	\$14,296,291.27	
Clothing		\$401,380.58	\$155,127.44	\$95,184.83	\$151,068.31	\$1,603,057.11	\$432,112.25	\$1,170,944.86	\$154,237.59	\$161,203.63	\$256,254.57	\$164,334.45	\$434,914.62	\$113,175.75	\$113,175.75	\$2,117,613.45	
	Bib-Shorts	\$19,582.69	\$10,758.95	-	\$8,823.74	\$147,157.02	\$40,831.61	\$106,325.41	\$14,092.43	\$17,408.78	\$15,195.03	\$15,732.12	\$43,897.04	-	-	\$166,739.71	
	Caps	\$12,682.44	\$3,933.44	\$3,919.97	\$4,829.04	\$33,718.25	\$9,326.74	\$24,391.51	\$3,015.19	\$2,680.25	\$5,652.34	\$2,774.55	\$10,269.18	\$4,828.75	\$4,828.75	\$51,229.45	
	Gloves	\$41,637.63	\$16,056.75	\$7,695.76	\$17,885.13	\$191,386.49	\$49,854.27	\$141,532.21	\$17,186.31	\$21,092.70	\$32,182.88	\$22,636.60	\$48,433.72	\$9,771.75	\$9,771.75	\$242,795.87	
	Jerseys	\$171,102.36	\$58,961.17	\$52,075.14	\$60,066.06	\$520,304.05	\$141,471.54	\$378,832.51	\$50,284.11	\$53,135.79	\$79,352.41	\$49,163.64	\$146,896.55	\$60,852.98	\$60,852.98	\$752,259.39	
	Shorts	\$62,889.75	\$29,163.44	\$7,657.37	\$26,068.94	\$334,983.02	\$90,245.12	\$244,737.89	\$31,442.57	\$22,543.72	\$74,268.37	\$34,750.69	\$81,732.54	\$15,649.76	\$15,649.76	\$413,522.53	
	Socks	\$3,048.06	\$848.66	\$786.18	\$1,413.23	\$25,690.19	\$4,546.95	\$21,143.24	\$3,464.16	\$2,159.49	\$4,562.47	\$3,316.93	\$7,640.20	\$1,006.88	\$1,006.88	\$29,745.13	
	Tights	\$21,737.65	\$11,791.67	-	\$9,945.98	\$180,095.35	\$47,733.92	\$132,361.44	\$18,689.68	\$21,029.30	\$20,805.09	\$18,893.35	\$52,944.02	-	-	\$201,833.01	
	Vests	\$68,700.00	\$23,613.38	\$23,050.42	\$22,036.20	\$169,722.75	\$48,102.10	\$121,620.66	\$16,063.15	\$21,153.59	\$24,235.98	\$17,066.58	\$43,101.36	\$21,065.62	\$21,065.62	\$259,488.37	

# PivotTable –Grand Total First for Row and Column

Newly added Grand Total First display option allows users to focus on the results first before they dive into the details. Enabling this option displays the Grand Total on top of every page.



## ▼ PivotTable1

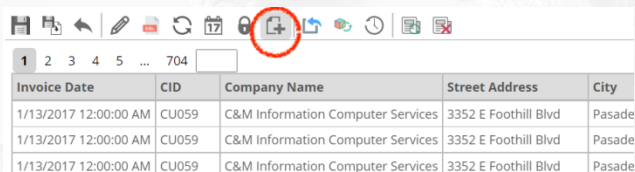
Drop a Filter Condition Here

Adventure Works		Group ▼ Country ▼ Region ▼														
		Grand Total	Europe	France	Germany	United Kingdom	North America	Canada	United States	Central	Northeast	Northwest	Southeast	Southwest	Pacific	Australia
Category ▼	Subcategory ▼	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount	Sales Amount
Grand Total		\$109,809,274.20	\$19,800,577.06	\$7,251,555.65	\$4,878,300.38	\$7,670,721.04	\$79,353,361.18	\$16,355,770.46	\$62,997,590.72	\$7,909,009.01	\$6,939,374.48	\$16,084,942.55	\$7,879,655.07	\$24,184,609.60	\$10,655,335.96	\$10,655,335.96
Accessories		\$1,272,057.89	\$327,977.23	\$111,438.51	\$97,315.66	\$119,223.07	\$781,442.50	\$221,505.20	\$559,937.30	\$46,296.64	\$51,001.72	\$163,069.77	\$45,749.33	\$253,819.85	\$162,638.16	\$162,638.16
	Bike Racks	\$237,096.16	\$62,873.27	\$24,426.62	\$18,105.98	\$20,340.66	\$155,816.18	\$44,575.67	\$111,240.52	\$14,160.50	\$16,616.10	\$24,412.40	\$14,657.39	\$41,394.12	\$18,406.70	\$18,406.70
	Bike Stands	\$39,591.00	\$10,653.00	\$3,021.00	\$3,180.00	\$4,452.00	\$18,603.00	\$5,088.00	\$13,515.00	-	-	\$5,724.00	-	\$7,791.00	\$10,335.00	\$10,335.00
	Bottles and Cages	\$64,274.79	\$18,999.42	\$5,621.21	\$6,216.15	\$7,162.06	\$33,667.83	\$9,041.85	\$24,625.98	\$624.86	\$719.75	\$9,429.85	\$582.93	\$13,268.60	\$11,607.54	\$11,607.54
	Cleaners	\$18,406.97	\$4,426.23	\$1,459.58	\$1,378.69	\$1,587.97	\$11,694.32	\$3,268.60	\$8,425.73	\$816.17	\$1,110.60	\$2,407.19	\$859.49	\$3,232.29	\$2,286.42	\$2,286.42
	Fenders	\$46,619.58	\$8,945.86	\$2,241.96	\$3,538.78	\$3,165.12	\$30,530.22	\$8,792.00	\$21,738.22	\$21.98	\$21.98	\$9,187.64	\$65.94	\$12,440.68	\$7,143.50	\$7,143.50
	Helmets	\$484,048.53	\$119,717.12	\$40,033.00	\$34,803.62	\$44,880.50	\$312,483.23	\$85,366.83	\$227,116.40	\$23,039.45	\$23,262.54	\$58,595.21	\$23,226.87	\$98,992.33	\$51,848.18	\$51,848.18
	Hydration Packs	\$105,826.42	\$27,876.80	\$8,829.00	\$9,140.49	\$9,907.31	\$63,740.80	\$18,527.03	\$45,213.76	\$4,666.03	\$6,089.54	\$11,454.64	\$3,865.47	\$19,138.08	\$14,208.82	\$14,208.82
	Locks	\$16,225.22	\$1,785.00	\$1,050.00	-	\$735.00	\$14,440.22	\$4,210.24	\$10,229.98	\$1,620.00	\$1,455.00	\$1,560.00	\$1,295.52	\$4,299.46	-	-
	Pumps	\$13,514.69	\$1,778.89	\$1,071.25	-	\$707.65	\$11,735.79	\$3,135.48	\$8,600.31	\$1,163.42	\$1,487.26	\$1,359.10	\$947.53	\$3,643.01	-	-
	Tires and Tubes	\$246,454.53	\$70,921.64	\$23,684.89	\$20,951.94	\$26,284.80	\$128,730.90	\$39,499.51	\$89,231.39	\$184.23	\$328.95	\$38,939.73	\$248.21	\$49,620.27	\$46,801.99	\$46,801.99
Bikes		\$94,620,526.21	\$17,154,361.22	\$6,114,241.36	\$4,351,530.00	\$6,688,589.87	\$67,290,294.25	\$13,457,682.99	\$53,832,611.26	\$6,761,069.95	\$5,675,571.16	\$13,882,022.99	\$6,710,273.22	\$20,803,673.94	\$10,175,870.74	\$10,175,870.74
	Mountain Bikes	\$36,445,443.94	\$5,506,552.01	\$1,911,750.69	\$1,197,672.61	\$2,397,128.71	\$27,966,136.93	\$5,338,237.22	\$22,627,899.72	\$2,889,550.49	\$1,573,564.55	\$7,211,753.84	\$3,332,081.89	\$7,620,948.95	\$2,972,755.00	\$2,972,755.00
	Road Bikes	\$43,878,791.00	\$7,146,798.45	\$2,705,376.99	\$1,554,876.63	\$2,886,544.83	\$31,724,512.12	\$6,649,827.43	\$25,074,684.68	\$3,486,300.17	\$3,603,841.86	\$4,394,959.21	\$2,839,376.75	\$10,750,206.69	\$5,007,480.44	\$5,007,480.44
	Touring Bikes	\$14,296,291.27	\$4,501,017.77	\$1,497,113.68	\$1,598,980.76	\$1,404,916.33	\$7,599,645.20	\$1,469,618.34	\$6,130,026.86	\$385,219.29	\$498,164.76	\$2,275,309.94	\$538,814.58	\$2,432,518.29	\$2,195,635.30	\$2,195,635.30
Clothing		\$2,117,613.45	\$401,380.58	\$155,127.44	\$95,184.83	\$151,068.31	\$1,603,057.11	\$432,112.25	\$1,170,944.86	\$154,237.59	\$161,203.63	\$256,254.57	\$164,334.45	\$434,914.62	\$113,175.75	\$113,175.75
	Bib-Shorts	\$166,739.71	\$19,582.69	\$10,758.95	-	\$8,823.74	\$147,157.02	\$40,831.61	\$106,325.41	\$14,092.43	\$17,408.78	\$15,195.03	\$15,732.12	\$43,897.04	-	-
	Caps	\$51,229.45	\$12,682.44	\$3,933.44	\$3,919.97	\$4,829.04	\$33,718.25	\$9,326.74	\$24,391.51	\$3,015.19	\$2,680.25	\$5,652.34	\$2,774.55	\$10,269.18	\$4,828.75	\$4,828.75
	Gloves	\$242,795.87	\$41,637.63	\$16,056.75	\$7,695.76	\$17,885.13	\$191,386.49	\$49,854.27	\$141,532.21	\$17,186.31	\$21,092.70	\$32,182.88	\$22,636.60	\$48,433.72	\$9,771.75	\$9,771.75
	Jerseys	\$752,259.39	\$171,102.36	\$58,961.17	\$52,075.14	\$60,264.06	\$520,304.05	\$141,471.54	\$378,832.51	\$50,284.11	\$53,135.79	\$79,352.41	\$49,163.64	\$146,896.55	\$60,852.98	\$60,852.98
	Shorts	\$413,522.53	\$62,889.75	\$29,163.44	\$7,657.37	\$26,068.94	\$334,983.02	\$90,245.12	\$244,737.89	\$31,442.57	\$22,543.72	\$74,268.37	\$34,750.69	\$81,732.54	\$15,649.76	\$15,649.76
	Socks	\$29,745.13	\$3,048.06	\$848.66	\$786.18	\$1,413.23	\$25,690.19	\$4,546.95	\$21,143.24	\$3,464.16	\$2,159.49	\$4,562.47	\$3,316.93	\$7,640.20	\$1,006.88	\$1,006.88
	Tights	\$201,833.01	\$21,737.65	\$11,791.67	-	\$9,945.98	\$180,095.35	\$47,733.92	\$132,361.44	\$18,689.68	\$21,029.30	\$20,805.09	\$18,893.35	\$52,944.02	-	-
	Vests	\$259,488.37	\$68,700.00	\$23,613.38	\$23,050.42	\$22,036.20	\$169,722.75	\$48,102.10	\$121,620.66	\$16,063.15	\$21,153.59	\$24,235.98	\$17,066.58	\$43,101.36	\$21,065.62	\$21,065.62

## PivotTable – Show Hidden Columns Option

# Report Templates

Report Templates provide users with the ability to quickly create a variety of analysis reports through simple parameter settings, including proportion analysis, year-on-year quarter-on-quarter analysis, growth trend analysis, performance evaluation analysis, importance analysis, correlation analysis, and so on. The user can use a report template on an existing cube or Data Package or directly on a member or a cell.



Invoice Date	CID	Company Name	Street Address	City
1/13/2017 12:00:00 AM	CU059	C&M Information Computer Services	3352 E Foothill Blvd	Pasade
1/13/2017 12:00:00 AM	CU059	C&M Information Computer Services	3352 E Foothill Blvd	Pasade
1/13/2017 12:00:00 AM	CU059	C&M Information Computer Services	3352 E Foothill Blvd	Pasade

## Report Templates

All Templates
General
Time
Categorical
Comparison
Geography
Dashboard

Blank

Basic

Treemap

Annual Growth 1

Annual Growth 2

Quarterly Growth

Quarterly Trend

Monthly Trend

Two-Year Monthly YTD Analysis

YTD

Yearly Budget Achievement Analysis

Quarterly Performance

Category Analysis

Importance Analysis

Geography Analysis

## Monthly Trend Analysis

This report provides a monthly trend analysis of

Sales Amount

related to

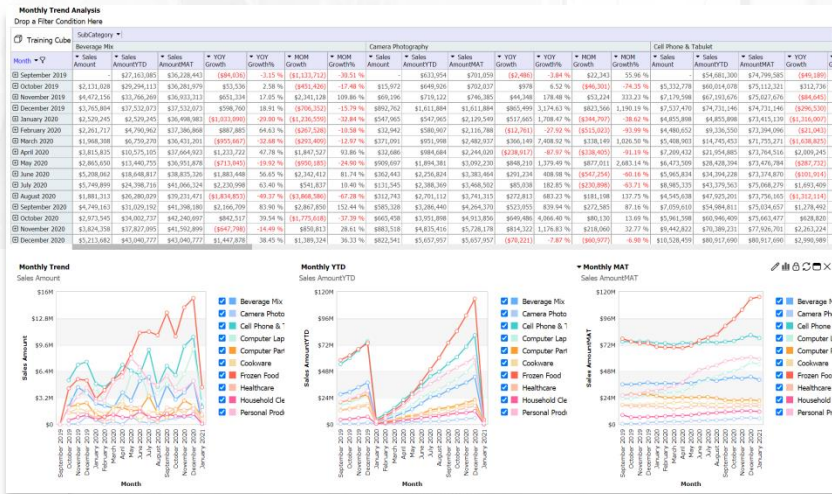
SubCategory

and the following time settings

Calendar Y-M-D Show last 2 years

☒ Include last month

Create Back Cancel

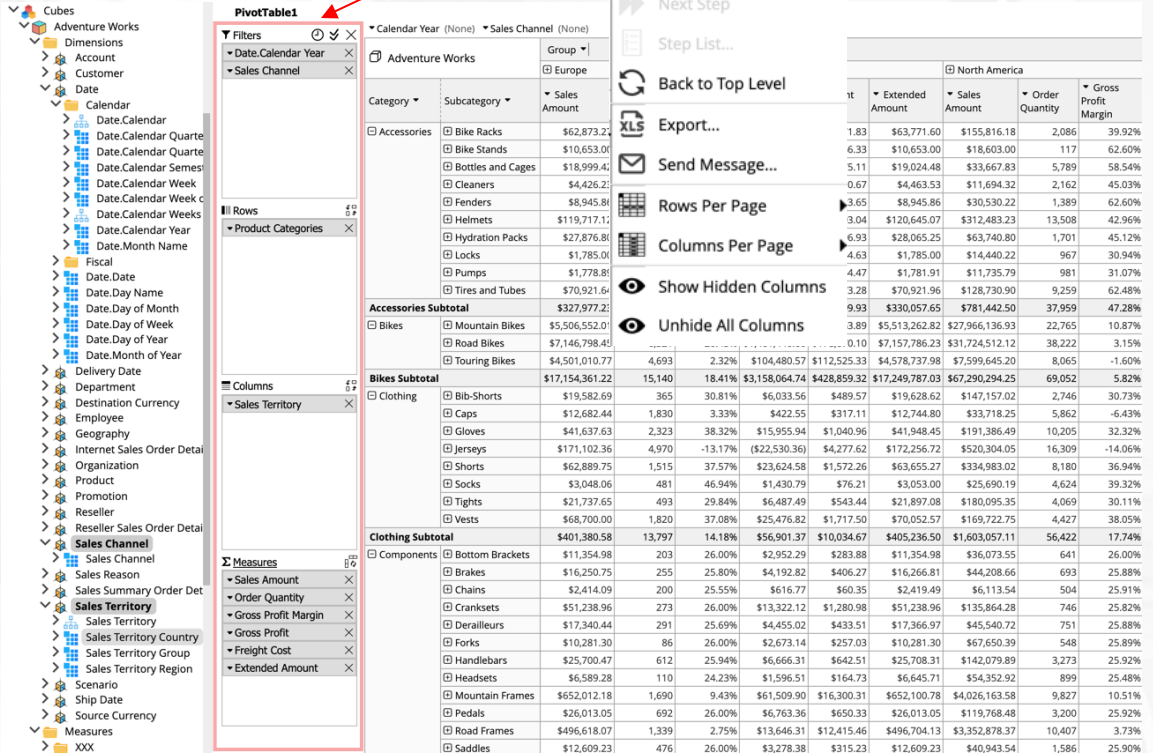




# PivotTable – Field Drop Zone

Added the Field Drop Zone function to the PivotTable, which provides users with convenient and quick creation and modification of the PivotTable structures such as Row, Column, Slicer, and Measure.

- In addition to adding and deleting structures, you can also change the order of objects by dragging.
- Two modes of operation are supported - one is dynamically changing the content with each dragging (default) or wait till the end to press the Update to change (Defer).
- Each object has its menu; a Measure can set all functions in Field Drop Zone. The Slicer, Rows, and Columns can select the default Filter state in Field Drop Zone.
- Currently, it does not support dragging the Level and Dimension Node to Field Drop Zone.



**PivotTable1**

Filters: Date.Calendar Year, Sales Channel

Columns: Sales Territory

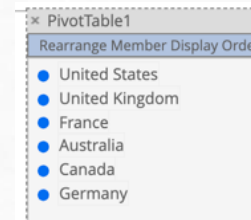
Measures: Sales Amount, Order Quantity, Gross Profit Margin, Freight Cost, Extended Amount

Category	Subcategory	Sales Amount	Order Quantity	Gross Profit Margin
Accessories	Bike Racks	\$62,873.22	1,83	39.92%
Accessories	Bike Stands	\$10,653.00	6.33	62.60%
Accessories	Bottles and Cages	\$18,999.42	5.11	58.54%
Accessories	Cleaners	\$4,426.22	0.67	45.03%
Accessories	Fenders	\$8,945.86	3.65	62.60%
Accessories	Helmets	\$119,717.12	6.93	45.12%
Accessories	Hydration Packs	\$27,876.00	4.47	31.07%
Accessories	Locks	\$1,785.00	4.63	30.94%
Accessories	Pumps	\$1,778.81	4.47	31.07%
Accessories	Tires and Tubes	\$70,921.66	3.28	62.48%
Accessories Subtotal		\$327,977.22	9.93	47.28%
Bikes	Mountain Bikes	\$5,506,552.01	3.89	10.87%
Bikes	Road Bikes	\$7,146,798.40	0.10	3.15%
Bikes	Touring Bikes	\$4,501,010.77	4.693	-1.60%
Bikes Subtotal		\$17,154,361.22	15,140	5.82%
Clothing	Bib-Shorts	\$19,582.69	365	30.81%
Clothing	Caps	\$12,682.44	1,830	3.33%
Clothing	Gloves	\$41,637.63	2,323	38.32%
Clothing	Jerseys	\$171,102.36	4,970	-13.17%
Clothing	Shorts	\$62,889.75	1,515	37.57%
Clothing	Socks	\$3,048.06	481	46.94%
Clothing	Tights	\$21,737.65	493	29.84%
Clothing	Vests	\$68,700.00	1,820	37.08%
Clothing Subtotal		\$401,380.58	13,797	14.18%
Components	Bottom Brackets	\$11,354.98	203	26.00%
Components	Brakes	\$16,250.75	255	25.80%
Components	Chains	\$2,414.09	200	25.55%
Components	Cranksets	\$51,238.96	273	26.00%
Components	Derailleurs	\$17,340.44	291	25.69%
Components	Forks	\$10,281.30	86	26.00%
Components	Handlebars	\$25,700.47	612	25.94%
Components	Headsets	\$6,586.28	110	24.23%
Components	Mountain Frames	\$652,012.18	1,690	9.43%
Components	Pedals	\$26,013.05	692	26.00%
Components	Road Frames	\$496,618.07	1,339	2.75%
Components	Saddles	\$12,609.23	476	26.00%



# PivotTable – Column Member Rearrange Display Order

Users can customize the order of column members in a drag-and-drop manner according to the interest of the data, free from the standard ascending and descending arrangement. For example, a user can arrange countries in order of interest instead of in alphabetical order.



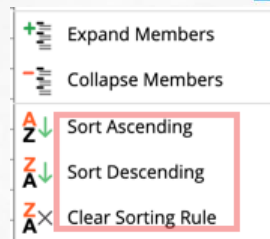
PivotTable1

Drop a Filter Condition Here

Adventure Works		Sales Territory Country ▾											
		United States		United Kingdom		France		Australia		Canada		Germany	
Category ▾	Subcategory ▾	Sales Amount	Order Quantity	Sales Amount	Order Quantity	Sales Amount	Order Quantity	Sales Amount	Order Quantity	Sales Amount	Order Quantity	Sales Amount	Order Quantity
Accessories		\$559,937.30	27,196	\$119,223.07	5,906	\$111,438.51	5,390	\$162,638.16	7,867	\$221,505.20	10,763	\$97,315.66	4,809
Bikes	Mountain Bikes	\$22,627,899.72	18,169	\$2,397,128.71	1,926	\$1,911,750.69	1,464	\$2,972,755.00	1,430	\$5,338,237.22	4,596	\$1,197,672.61	736
	Road Bikes	\$25,074,684.68	30,024	\$2,886,544.83	2,627	\$2,705,376.99	2,659	\$5,007,480.44	2,605	\$6,649,827.43	8,198	\$1,554,876.63	1,035
	Touring Bikes	\$6,130,026.86	6,445	\$1,404,916.33	1,387	\$1,497,113.68	1,615	\$2,195,635.30	1,993	\$1,469,618.34	1,620	\$1,598,980.76	1,691
Bikes Subtotal		\$53,832,611.26	54,638	\$6,688,589.87	5,940	\$6,114,241.36	5,738	\$10,175,870.74	6,028	\$13,457,682.99	14,414	\$4,351,530.00	3,462
Clothing	Bib-Shorts	\$106,325.41	1,982	\$8,823.74	164	\$10,758.95	201	-	-	\$40,831.61	764	-	-
	Caps	\$24,391.51	4,224	\$4,829.04	688	\$3,933.44	587	\$4,828.75	619	\$9,326.74	1,638	\$3,919.97	555
	Gloves	\$141,532.21	7,539	\$17,885.13	965	\$16,056.75	891	\$9,771.75	455	\$49,854.27	2,666	\$7,695.76	467
	Jerseys	\$378,832.51	11,851	\$60,066.06	1,725	\$58,961.17	1,740	\$60,852.98	1,432	\$141,471.54	4,458	\$52,075.14	1,505
	Shorts	\$244,737.89	6,020	\$26,068.94	633	\$29,163.44	700	\$15,649.76	270	\$90,245.12	2,160	\$7,657.37	182
	Socks	\$21,143.24	3,834	\$1,413.23	220	\$848.66	136	\$1,006.88	112	\$4,546.95	790	\$786.18	125
	Tights	\$132,361.44	2,996	\$9,945.98	223	\$11,791.67	270	-	-	\$47,733.92	1,073	-	-
	Vests	\$121,620.66	3,168	\$22,036.20	574	\$23,613.38	628	\$21,065.62	491	\$48,102.10	1,259	\$23,050.42	618
Clothing Subtotal		\$1,170,944.86	41,614	\$151,068.31	5,192	\$155,127.44	5,153	\$113,175.75	3,379	\$432,112.25	14,808	\$95,184.83	3,452
Components	Bottom Brackets	\$28,023.03	495	\$4,203.44	76	\$4,559.81	82	\$4,397.84	77	\$8,050.52	146	\$2,591.73	45
	Brakes	\$34,021.68	533	\$5,687.10	89	\$7,624.25	120	\$5,559.30	87	\$10,186.98	160	\$2,939.40	46
	Chains	\$4,972.00	410	\$660.25	55	\$1,231.65	102	\$850.08	70	\$1,141.54	94	\$522.19	43
	Cranksets	\$105,118.64	582	\$15,591.98	86	\$24,647.51	131	\$16,839.37	88	\$30,745.65	164	\$10,999.46	56
	Derailleurs	\$34,339.88	563	\$5,390.01	90	\$8,605.68	144	\$7,328.33	124	\$11,200.84	188	\$3,344.74	57

# PivotTable – Column Axis Sorting

PivotTable Column now supports ascending or descending sorting according to Member Name. Previously, the members display in ascending order as the oldest year will be at the start of the table. With the new option, apply descending displays the most recent year at the beginning of the table so the user can more easily understand the current status of the data.



## ▼ PivotTable1

Drop a Filter Condition Here

		Calendar Year ▼ Z   Calendar Quarter ▼ Z																	
Adventure Works		CY 2008						CY 2008 Subtotal		CY 2007								CY 2007 Subtotal	
		Q3 CY 2008		Q2 CY 2008		Q1 CY 2008				Q4 CY 2007		Q3 CY 2007		Q2 CY 2007		Q1 CY 2007			
Category ▼	Subcategory ▼	▼ Sales Amount	▼ Order Quantity	▼ Sales Amount	▼ Order Quantity	▼ Sales Amount	▼ Order Quantity	▼ Sales Amount	▼ Order Quantity	▼ Sales Amount	▼ Order Quantity	▼ Sales Amount	▼ Order Quantity	▼ Sales Amount	▼ Order Quantity	▼ Sales Amount	▼ Order Quantity	▼ Sales Amount	▼ Order Quantity
Accessories	Bike Racks	\$2,400.00	20	\$62,693.40	821	\$37,134.29	467	\$102,227.69	1,308	\$60,436.90	810	\$74,431.57	1,048	-	-	-	-	\$134,868.47	1,858
	Bike Stands	\$1,749.00	11	\$10,653.00	67	\$8,268.00	52	\$20,670.00	130	\$11,925.00	75	\$6,996.00	44	-	-	-	-	\$18,921.00	119
	Bottles and Cages	\$1,767.38	262	\$18,641.96	2,994	\$16,103.85	2,469	\$36,513.19	5,725	\$15,951.74	2,631	\$11,809.87	2,196	-	-	-	-	\$27,761.60	4,827
	Cleaners	\$349.80	44	\$4,922.33	876	\$3,356.91	555	\$8,629.03	1,475	\$4,700.36	848	\$5,077.57	996	-	-	-	-	\$9,777.94	1,844
	Fenders	\$2,351.86	107	\$13,275.92	604	\$11,583.46	527	\$27,211.24	1,238	\$11,759.30	535	\$7,649.04	348	-	-	-	-	\$19,408.34	883
	Helmets	\$9,412.31	269	\$101,495.02	3,583	\$72,597.25	2,398	\$183,504.58	6,250	\$89,325.72	3,227	\$79,709.95	3,372	\$25,336.49	1,281	\$11,655.04	578	\$206,027.20	8,458
	Hydration Packs	\$1,484.73	27	\$28,141.15	727	\$17,896.63	411	\$47,522.51	1,165	\$26,930.73	714	\$31,373.18	882	-	-	-	-	\$58,303.91	1,596
	Locks	-	-	-	-	-	-	-	-	-	-	-	-	\$3,935.52	263	\$2,205.00	147	\$6,140.52	410
	Pumps	-	-	-	-	-	-	-	-	-	-	-	-	\$3,382.31	282	\$1,763.12	147	\$5,145.43	429
	Tires and Tubes	\$14,229.56	1,033	\$66,817.33	4,904	\$61,519.46	4,332	\$142,566.34	10,269	\$61,948.17	4,566	\$41,940.02	3,171	-	-	-	-	\$103,888.18	7,737
Accessories Subtotal		\$33,744.64	1,773	\$306,640.10	14,576	\$228,459.84	11,211	\$568,844.58	27,560	\$282,977.91	13,406	\$258,987.20	12,057	\$32,654.32	1,826	\$15,623.16	872	\$590,242.59	28,161
Bikes	Mountain Bikes	-	-	\$4,246,170.24	3,608	\$3,470,767.56	2,875	\$7,716,937.80	6,483	\$3,807,251.85	3,444	\$3,611,906.39	3,521	\$2,908,232.52	2,436	\$2,516,510.74	2,147	\$12,843,901.51	11,548
	Road Bikes	-	-	\$3,990,347.88	4,181	\$3,378,556.68	3,495	\$7,368,904.57	7,676	\$3,724,037.68	3,917	\$3,825,024.35	4,085	\$4,114,351.66	5,222	\$3,582,996.90	4,491	\$15,246,410.58	17,715
	Touring Bikes	-	-	\$4,062,733.29	3,797	\$3,412,992.38	3,197	\$7,475,725.67	6,994	\$3,754,315.28	3,693	\$3,066,250.32	4,064	-	-	-	-	\$6,820,565.60	7,757
Bikes Subtotal		-	-	\$12,299,251.42	11,586	\$10,262,316.62	9,567	\$22,561,568.03	21,153	\$11,285,604.81	11,054	\$10,503,181.06	11,670	\$7,022,584.18	7,658	\$6,099,507.65	6,638	\$34,910,877.69	37,020
Clothing	Bib-Shorts	-	-	-	-	-	-	-	-	-	-	-	-	\$43,333.39	809	\$21,543.61	399	\$64,876.99	1,208
	Caps	\$854.05	95	\$9,231.04	1,310	\$7,312.76	971	\$17,397.86	2,376	\$8,482.37	1,246	\$8,569.37	1,400	\$2,924.48	572	\$1,780.88	344	\$21,757.10	3,562
	Gloves	\$1,640.83	67	\$21,865.42	1,201	\$14,108.81	730	\$37,615.05	1,998	\$23,283.22	1,364	\$26,630.42	1,689	\$41,090.02	2,137	\$25,381.10	1,243	\$116,384.76	6,433
	Jerseys	\$7,884.47	153	\$143,382.68	3,985	\$102,117.70	2,713	\$253,384.85	6,851	\$139,979.59	3,995	\$170,942.83	5,278	\$31,260.57	1,091	\$18,192.20	632	\$360,375.19	10,996

## PivotTable – Base Column option for Advanced Filter Value Filter

When using the Value Filter in the Advanced Filter, previously, the calculation could only act on the Grand Total, but now the option of using a Base member has been added by targeting a specific Column member. For example, the following filter identifies members of Subcategories in North America whose Gross Profit Margin is less than 10%.

### x Advanced Filter

Dimension Product Categories

Level **Subcategory** ☒ Apply settings when level changed

Filter Type ☐ None ☐ Label Filter ☒ Value Filter ☐ Date Filter

Gross Profit Margin **Less than** 0.1

Based on member **North America**

OK

Clear Filters

Cancel

### ▼ PivotTable1

Drop a Filter Condition Here

Adventure Works		Group ▼										
		Europe						North America				
Category ▼	Subcategory ▼	▼ Sales Amount	▼ Order Quantity	▼ Gross Profit Margin	▼ Gross Profit	▼ Standard Product Cost	▼ Sales Amount	▼ Order Quantity	▼ Gross Profit Margin	▼ Gross Profit	▼ Standard Product Cost	▼
▢ Bikes	▢ Road Bikes	\$7,146,798.45	6,321	20.45%	\$1,461,440.60	\$3,597,774.77	\$31,724,512.12	38,222	3.15%	\$998,384.16	\$12,613,982.47	\$5
	▢ Touring Bikes	\$4,501,010.77	4,693	2.32%	\$104,480.57	\$1,816,091.05	\$7,599,645.20	8,065	-1.60%	(\$121,433.41)	\$3,361,377.84	\$2
<b>Bikes Subtotal</b>		\$11,647,809.22	11,014	13.44%	\$1,565,921.18	\$5,413,865.82	\$39,324,157.31	46,287	2.23%	\$876,950.75	\$15,975,360.31	\$7
▢ Clothing	▢ Caps	\$12,682.44	1,830	3.33%	\$422.55	\$6,839.36	\$33,718.25	5,862	-6.43%	(\$2,169.60)	\$12,307.28	
	▢ Jerseys	\$171,102.36	4,970	-13.17%	(\$22,530.36)	\$64,693.56	\$520,304.05	16,309	-14.06%	(\$73,141.47)	\$170,960.54	
<b>Clothing Subtotal</b>		\$183,784.81	6,800	-12.03%	(\$22,107.81)	\$71,532.92	\$554,022.30	22,171	-13.59%	(\$75,311.06)	\$183,267.82	
▢ Components	▢ Road Frames	\$496,618.07	1,339	2.75%	\$13,646.31	\$196,255.19	\$3,352,878.37	10,407	3.73%	\$125,228.91	\$1,327,876.61	
	▢ Touring Frames	\$520,015.08	1,204	-0.29%	(\$1,528.98)	\$162,144.04	\$996,279.47	2,239	-0.38%	(\$3,790.16)	\$382,222.51	:
<b>Components Subtotal</b>		\$1,016,633.15	2,543	1.19%	\$12,117.34	\$358,399.24	\$4,349,157.84	12,646	2.79%	\$121,438.75	\$1,710,099.13	:
<b>Grand Total</b>		\$12,848,227.18	20,357	12.11%	\$1,555,930.70	\$5,843,797.98	\$44,227,337.45	81,104	2.09%	\$923,078.43	\$17,868,727.26	\$7

# PivotTable – Dimension to support Exclude Member

Supports multiple selections directly on the Row and Column Members of the PivotTable and runs the Exclude Members function to filter out the selected members.

**PivotTable1**  
▼ Calendar Year (None) ▼ Sales Channel (None)

Adventure Works		Group ▼				
		Europe				
Category ▼	Subcategory ▼	▼ Sales Amount	▼ Order Quantity	▼ Gross Profit Margin	▼ Gross Profit	▼ Freight Cost
Accessories	Bike Racks	\$62,873.27	857	38.83%	\$24,411.11	\$1,571.83
	Bike Stands	\$10,653.00	67	62.60%	\$6,668.78	\$266.33
	Bottles and Cages	\$18,999.42	3,069	59.73%	\$11,347.89	\$475.11
	Cleaners	\$4,426.23	821	44.85%	\$1,985.15	\$110.67
	Fenders	\$8,945.86	407	62.60%	\$5,600.12	\$223.65
	Helmets	\$2,993.04	20	51.32%	\$61,438.55	\$2,993.04
	Hydration Packs	\$12,328.68	36	44.23%	\$12,328.68	\$696.93
Accessories Subtotal	Locks	\$557.81	9	31.25%	\$557.81	\$44.63
	Pumps	\$550.26	19	30.93%	\$550.26	\$44.47
	Tires	\$44,328.24	10	62.50%	\$44,328.24	\$1,773.28
		\$169,216.58	35	51.59%	\$169,216.58	\$8,199.93
Bikes	Mountain Bikes	\$1,592,143.56	26	28.91%	\$1,592,143.56	\$137,663.89
	Road Bikes	\$1,461,440.60	21	20.45%	\$1,461,440.60	\$178,670.10
	Touring Bikes	\$104,480.57	23	2.32%	\$104,480.57	\$112,525.33
Bikes Subtotal		\$3,158,064.74	10	18.41%	\$3,158,064.74	\$428,859.32
Clothing	Bib-Shorts	\$6,033.56	35	30.81%	\$6,033.56	\$489.57
	Caps	\$422.55	10	3.33%	\$422.55	\$317.11
	Gloves	\$15,955.94	23	38.32%	\$15,955.94	\$1,040.96
	Jerseys	\$22,530.36	4970	-13.17%	\$22,530.36	\$4,277.62
	Shorts	\$23,624.58	1,515	37.57%	\$23,624.58	\$1,572.26

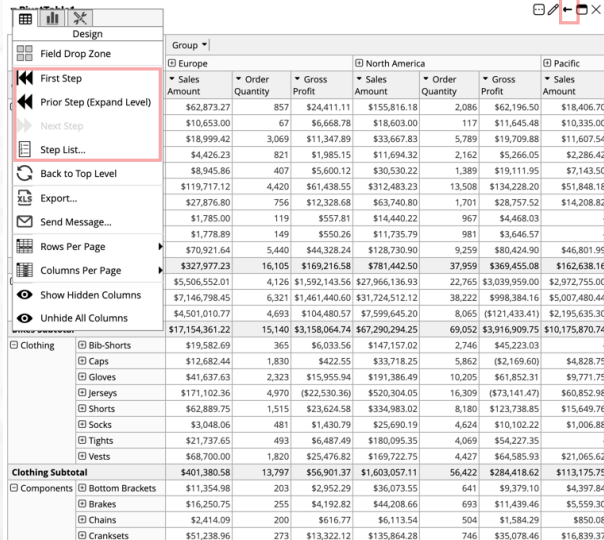
**PivotTable1**  
▼ Calendar Year (None) ▼ Sales Channel (None)

Adventure Works		Group ▼				
		Europe				
Category ▼	Subcategory ▼	▼ Sales Amount	▼ Order Quantity	▼ Gross Profit Margin	▼ Gross Profit	▼ Freight Cost
Accessories	Bike Racks	\$62,873.27	857	38.83%	\$24,411.11	\$1,571.83
	Bike Stands	\$10,653.00	67	62.60%	\$6,668.78	\$266.33
	Bottles and Cages	\$18,999.42	3,069	59.73%	\$11,347.89	\$475.11
	Locks	\$1,785.00	119	31.25%	\$557.81	\$44.63
	Pumps	\$1,778.89	149	30.93%	\$550.26	\$44.47
	Tires and Tubes	\$70,921.64	5,440	62.50%	\$44,328.24	\$1,773.28
Accessories Subtotal		\$167,011.22	9,701	52.61%	\$87,864.08	\$4,175.65
Bikes	Mountain Bikes	\$5,506,552.01	4,126	28.91%	\$1,592,143.56	\$137,663.89
	Road Bikes	\$7,146,798.45	6,321	20.45%	\$1,461,440.60	\$178,670.10
	Touring Bikes	\$4,501,010.77	4,693	2.32%	\$104,480.57	\$112,525.33
Bikes Subtotal		\$17,154,361.22	15,140	18.41%	\$3,158,064.74	\$428,859.32
Clothing	Bib-Shorts	\$19,582.69	365	30.81%	\$6,033.56	\$489.57
	Caps	\$12,682.44	1,830	3.33%	\$422.55	\$317.11
	Gloves	\$41,637.63	2,323	38.32%	\$15,955.94	\$1,040.96
	Jerseys	\$171,102.36	4,970	-13.17%	\$22,530.36	\$4,277.62
	Shorts	\$62,889.75	1,515	37.57%	\$23,624.58	\$1,572.26

# PivotTable – New App Key to control the record threshold to disable the Step List

To prevent recording reports with excessive data volume which might affect system performance, Analyzer switches off the Step List whenever the number of rows, columns, or the slicer filter members exceeds 100. The Undo function is disabled after that. Now, the administrator can adjust this value with the new "StepListDisableOn" appSettings key. Set the value to -1 to permanently enable the Step List.

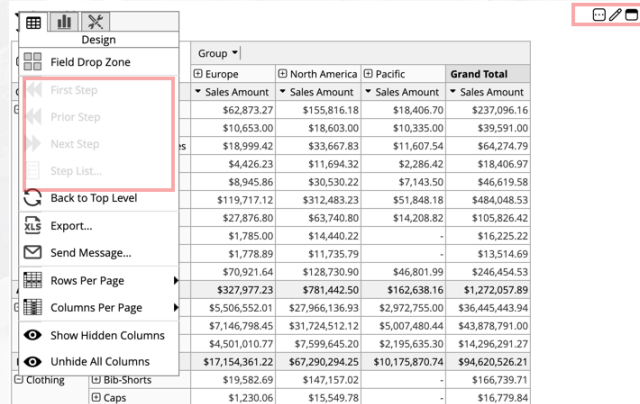
<add key="StepListDisableOn" value="100"/>



The screenshot shows a PivotTable interface with a 'Design' tab. The 'Field Drop Zone' is visible on the left. The 'Step List' is expanded, showing 'First Step', 'Prior Step', 'Next Step', and 'Step List...'. The 'Step List...' option is highlighted. The PivotTable data is displayed in a grid with columns for Sales Amount, Order Quantity, Gross Profit, and Sales Amount. The data is grouped by Region (Europe, North America, Pacific) and Product (Clothing, Components).

Region	Sales Amount	Order Quantity	Gross Profit	Sales Amount	Order Quantity	Gross Profit	Sales Amount
Europe	\$62,873.27	857	\$24,411.11	\$155,816.18	2,086	\$62,196.50	\$18,406.70
North America	\$10,653.00	67	\$6,668.78	\$18,603.00	117	\$1,645.48	\$10,335.00
Pacific	\$18,999.42	3,069	\$11,347.89	\$33,667.83	5,789	\$19,709.88	\$11,607.54
Grand Total	\$4,426.23	821	\$1,985.15	\$11,694.32	2,162	\$5,266.05	\$2,286.42

## Disabled Step List



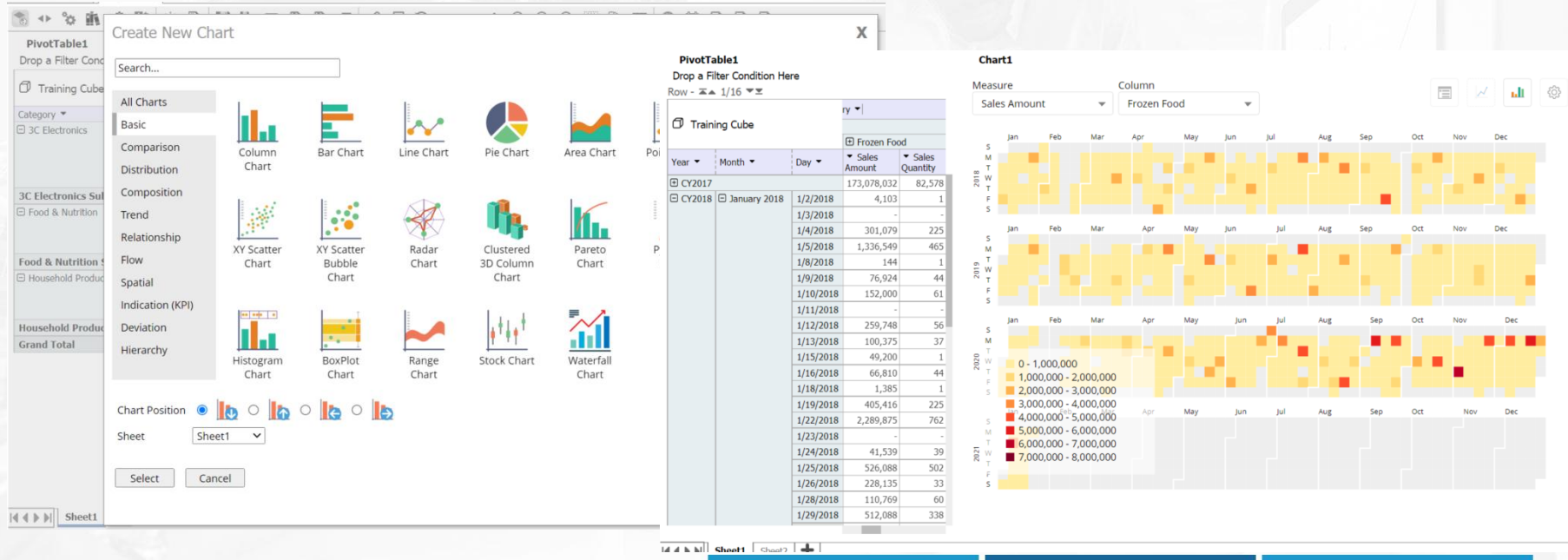
The screenshot shows the same PivotTable interface, but the 'Step List' is disabled. The 'Step List...' option is no longer visible in the 'Step List' dropdown. The PivotTable data is displayed in a grid with columns for Sales Amount, Order Quantity, Gross Profit, and Sales Amount. The data is grouped by Region (Europe, North America, Pacific) and Product (Clothing, Components).

Region	Sales Amount	Order Quantity	Gross Profit	Sales Amount	Order Quantity	Gross Profit	Sales Amount
Europe	\$62,873.27	857	\$24,411.11	\$155,816.18	2,086	\$62,196.50	\$18,406.70
North America	\$10,653.00	67	\$6,668.78	\$18,603.00	117	\$1,645.48	\$10,335.00
Pacific	\$18,999.42	3,069	\$11,347.89	\$33,667.83	5,789	\$19,709.88	\$11,607.54
Grand Total	\$4,426.23	821	\$1,985.15	\$11,694.32	2,162	\$5,266.05	\$2,286.42



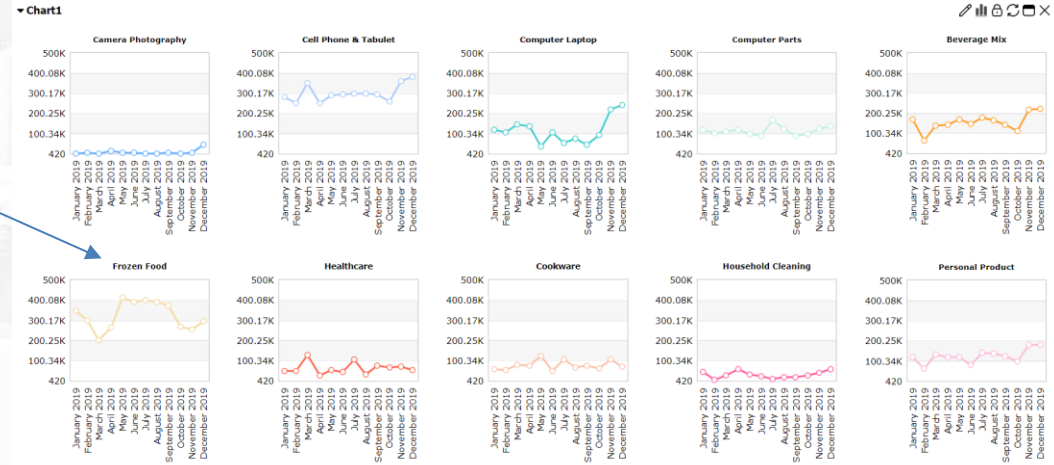
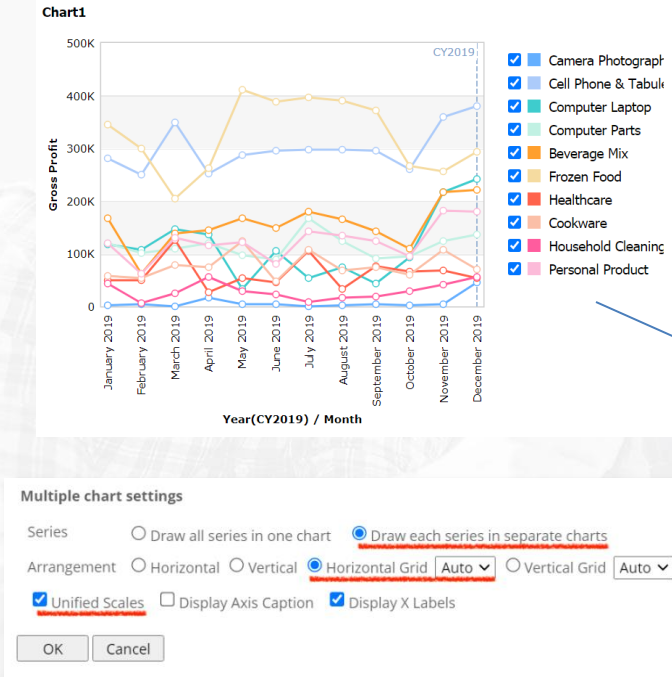
# PivotTable- PivotChart Supports Universal Charts

This version adds the creation of a **linked** Universal Chart directly from PivotTable data. The user can switch to other types of Universal Charts from the panel on the left. The below example shows a calendar chart.



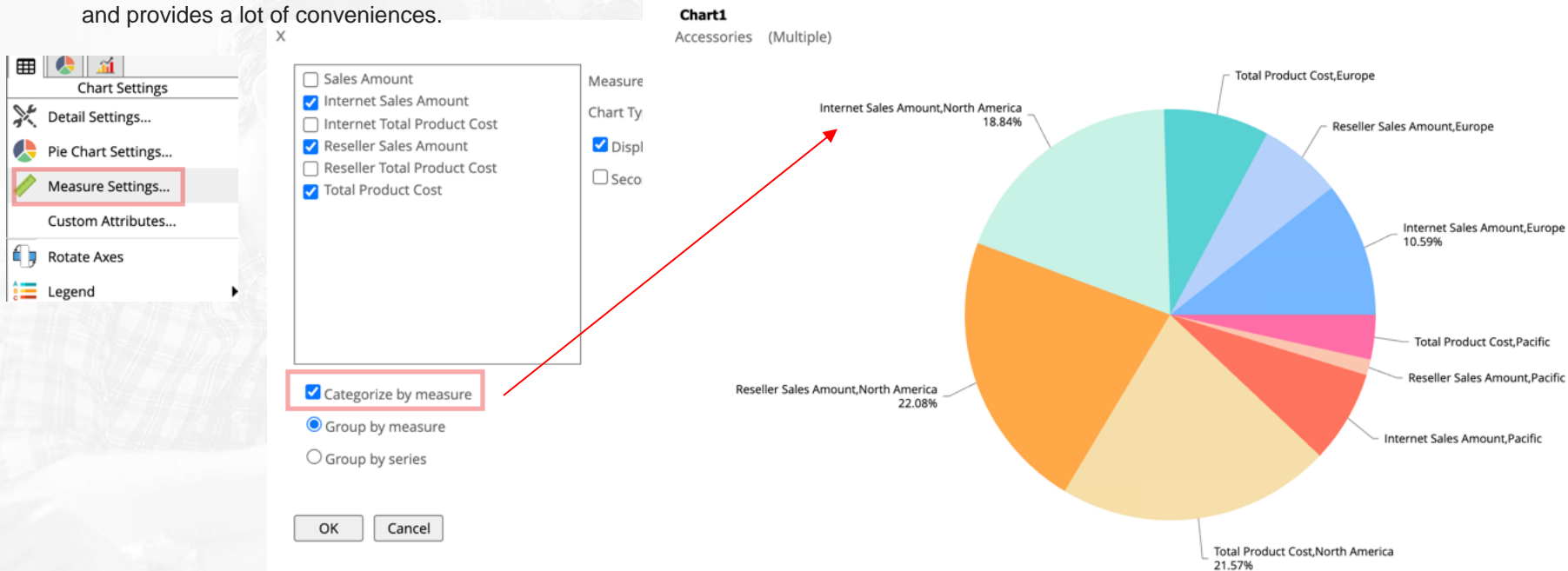
# PivotChart – Multiple Chart

The Detail Settings of a PivotChart now have Multiple Chart options. You can choose to present different Data Series as individual Charts. For example, the multiple charts replace the traditional chart with all the data series on a single chart. Use the Unified Scales to compare the charts with the same scale.



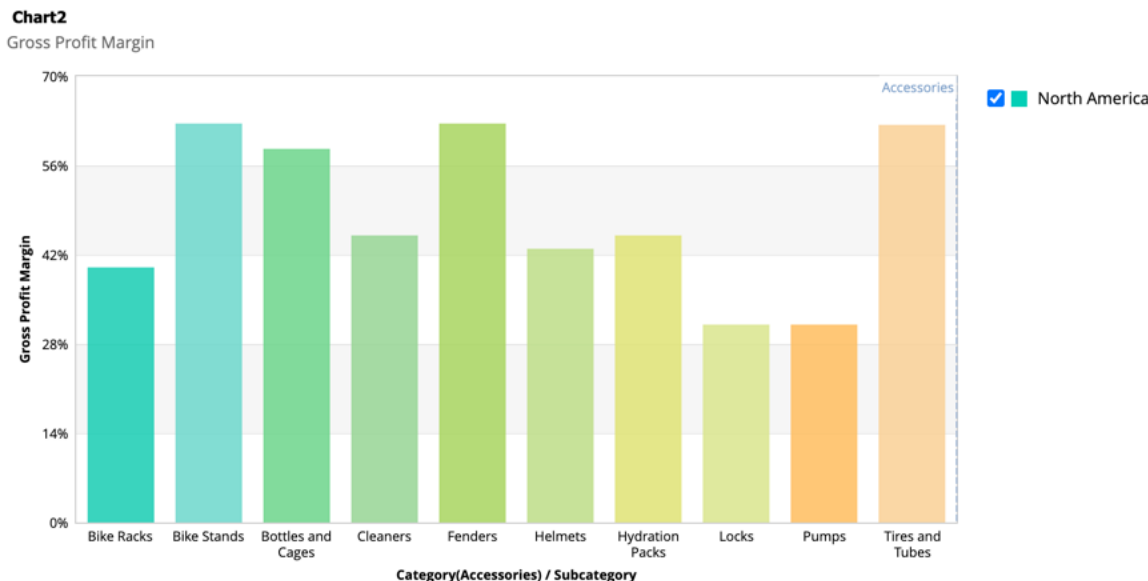
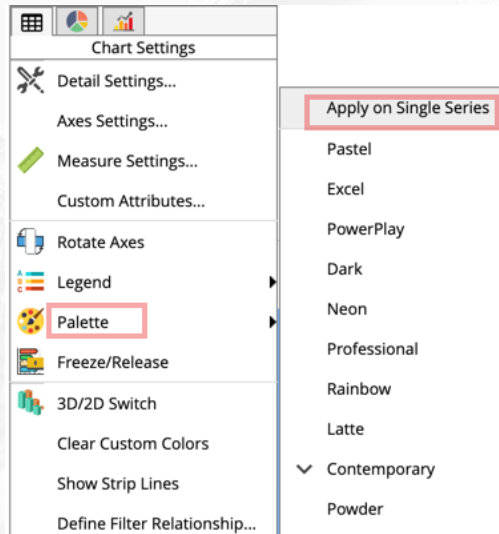
## PivotChart – Measure Settings to support Categorize by Measure

The Measure Settings of a PivotChart adds support for 'Categorize By Measure'. You can use multiple measures as a Series to draw a Chart, and the original Column member will automatically become an option. This function significantly increases the analysis angle of all PivotCharts and provides a lot of conveniences.



# PivotChart – Apply Colors on Single Series (Without Column or Only One Member)

A pivot chart without a column (or column has only one member) can now display chart members in different colors (previously only one color).



# PivotChart – New Waterfall Chart

The PivotChart now supports Waterfall Chart, and it provides the following features:

1. Use color to represent the positive and negative values, and both are customizable.
2. Deductive values such as cost and expense can be toggled as negative values to facilitate the calculation of Totals.
3. The user can append a Total to any member. Total can be calculated from the start or reset from the previous Total.
4. It has the option to add a Grand Total at the end.

☒ Use positive/negative colors

Positive Color 

Negative Color 

☒ Show total at end

Total Label

OK

Cancel

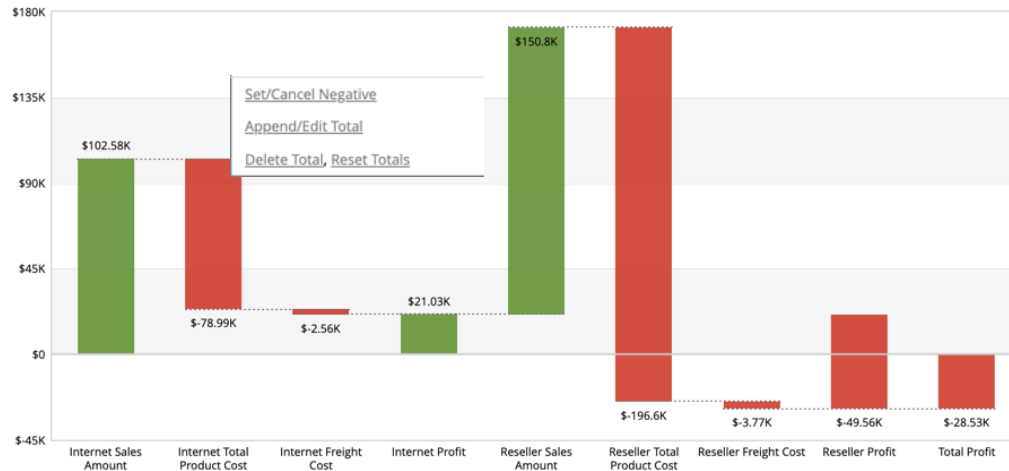
PivotTable1

Drop a Filter Condition Here

Adventure Works		Calendar Year ▼					
		CY 2008					
Category ▼	Subcategory ▼	Internet Sales Amount	Internet Total Product Cost	Internet Freight Cost	Reseller Sales Amount	Reseller Total Product Cost	Reseller Freight Cost
Clothing	Caps	\$11,731.95	\$9,033.60	\$293.36	\$5,665.91	\$7,413.78	\$141.65
	Gloves	\$20,792.01	\$7,776.25	\$519.84	\$16,823.04	\$10,524.04	\$420.58
	Jerseys	\$102,580.22	\$78,986.77	\$2,564.60	\$150,804.63	\$196,597.38	\$3,770.14
	Shorts	\$40,874.16	\$15,286.96	\$1,021.88	\$113,639.82	\$74,550.10	\$2,841.01
	Socks	\$2,876.80	\$1,075.94	\$71.94	\$7,271.66	\$4,653.42	\$181.80
	Vests	\$22,669.50	\$8,478.39	\$566.74	\$91,808.09	\$59,135.01	\$2,295.20
Clothing Subtotal		\$201,524.64	\$120,637.90	\$5,038.37	\$386,013.16	\$352,873.73	\$9,650.38
Grand Total		\$9,770,899.74	\$5,721,205.24	\$244,273.95	\$16,038,062.60	\$16,051,351.12	\$400,951.86

Waterfall Chart

Clothing.Jerseys





## Pivot Chart - Multiple secondary Y-axis support for Pivot Chart

Removed the restriction that only a single Measure can be displayed on the second Y-axis. Now each measure can be individually configured to use the secondary Y-axis, increasing the analytic chart's flexibility.

X

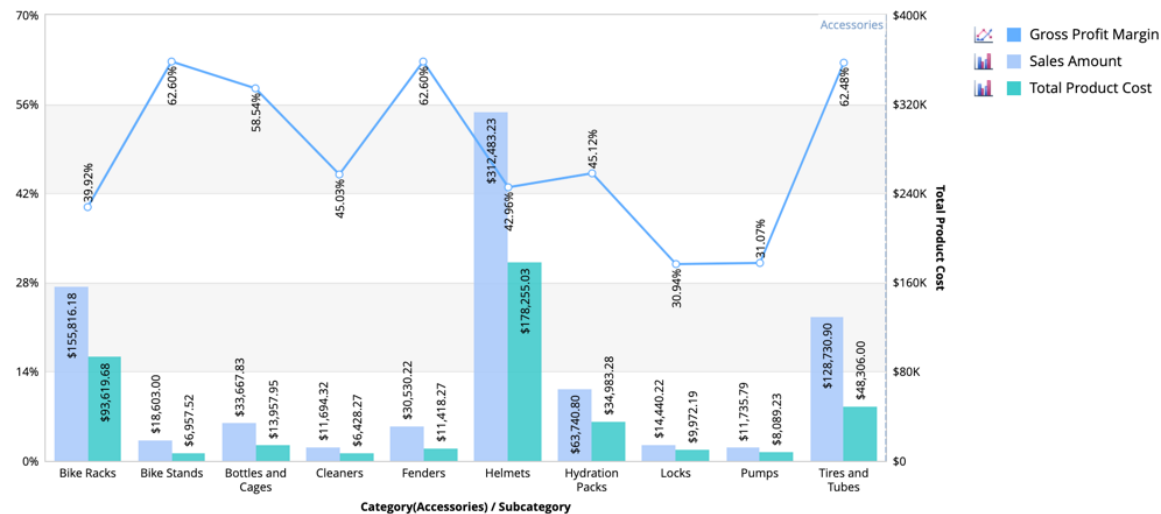
☒ Gross Profit Margin  
☒ Sales Amount  
☒ Total Product Cost

Measure Sales Amount  
 Chart Type (Default)  
☒ Display Number  
☒ Secondary Y Axis

☐ Categorize by measure  
☒ Group by measure  
☐ Group by series

OK Cancel

Chart1  
(Multiple)



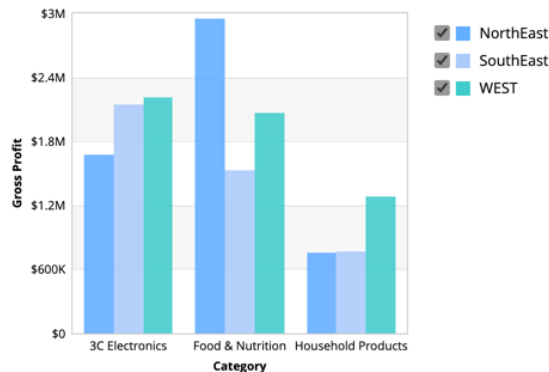
# PivotChart-Row and Column add Subtotal and Grand Total Data Series

Added the ability to add sub-total and grand-total row and column data series in Pivot Charts, providing more flexibility. The user can select both options at the same time. The previous version did not offer the data series for the grand total, and the sub-total does not work after the hierarchy expands.

**PivotTable1**  
Drop a Filter Condition Here

Sales Analysis	Region			
	NorthEast	SouthEast	WEST	Grand Total
Category	Gross Profit	Gross Profit	Gross Profit	Gross Profit
3C Electronics	\$1,678,584	\$2,145,928	\$2,205,479	\$6,029,991
Food & Nutrition	\$2,952,703	\$1,533,111	\$2,069,892	\$6,555,706
Household Products	\$751,073	\$768,791	\$1,285,186	\$2,805,050
<b>Grand Total</b>	<b>\$5,382,360</b>	<b>\$4,447,830</b>	<b>\$5,560,557</b>	<b>\$15,390,747</b>

Chart1



Caption: Chart2  
☐ Always display caption in Presentation View

Description:

☒ Show 3D Control Bar  
☐ Always plot chart with all data points  
 Scroll threshold on scrollable charts: 20 members  
☒ Disable scroll when exporting ☐ Return to the first level when opened  
☐ Display numbers ☐ Enable Passive Slicer

Rows: ☒ Subtotals ☒ Grand Total  
 Columns: ☒ Subtotals ☒ Grand Total

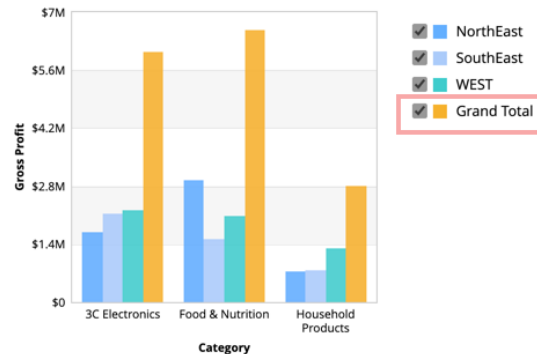
Multiple chart settings  
 Series: ☒ Draw all series in one chart ☐ Draw each series in separate charts  
 Arrangement: ☒ Horizontal ☐ Vertical ☐ Horizontal Grid ☐ Vertical Grid  
☒ Unified Scales ☐ Display Axis Caption ☒ Display X Labels

OK Cancel

**PivotTable1**  
Drop a Filter Condition Here

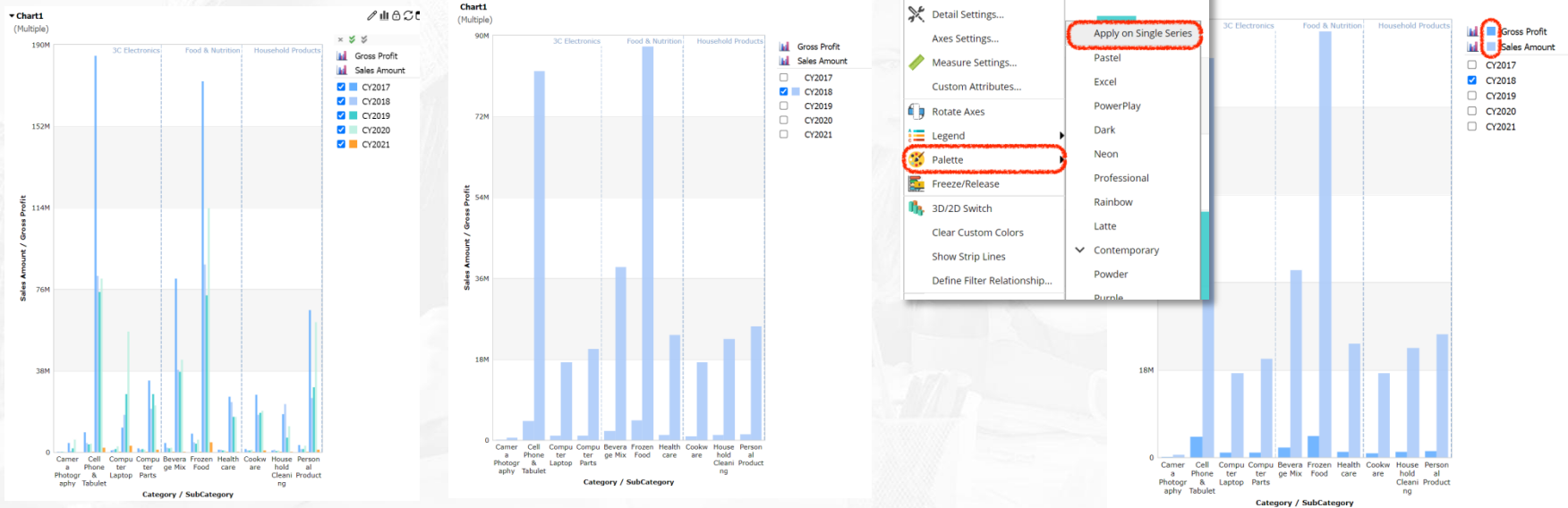
Sales Analysis	Region			
	NorthEast	SouthEast	WEST	Grand Total
Category	Gross Profit	Gross Profit	Gross Profit	Gross Profit
3C Electronics	\$1,678,584	\$2,145,928	\$2,205,479	\$6,029,991
Food & Nutrition	\$2,952,703	\$1,533,111	\$2,069,892	\$6,555,706
Household Products	\$751,073	\$768,791	\$1,285,186	\$2,805,050
<b>Grand Total</b>	<b>\$5,382,360</b>	<b>\$4,447,830</b>	<b>\$5,560,557</b>	<b>\$15,390,747</b>

Chart1



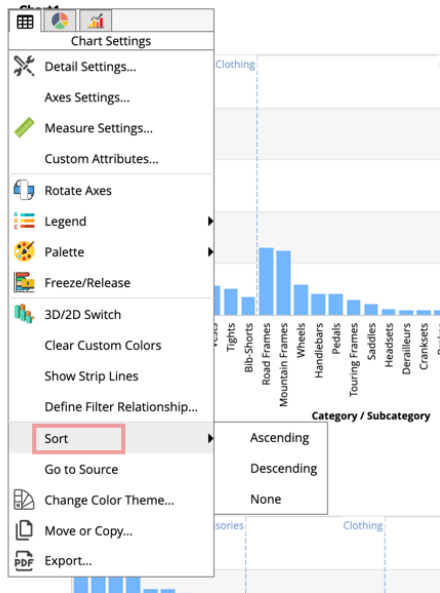
# PivotChart - With multiple measures, single-select a member on the legend can draw them in separate colors

A PivotChart with multiple measures and legend members, the color separates the legend members. However, to make the different measures stand out while a single series is selected, the user can now use "Apply on Single Series" from the Palette menu to draw them in different colors.



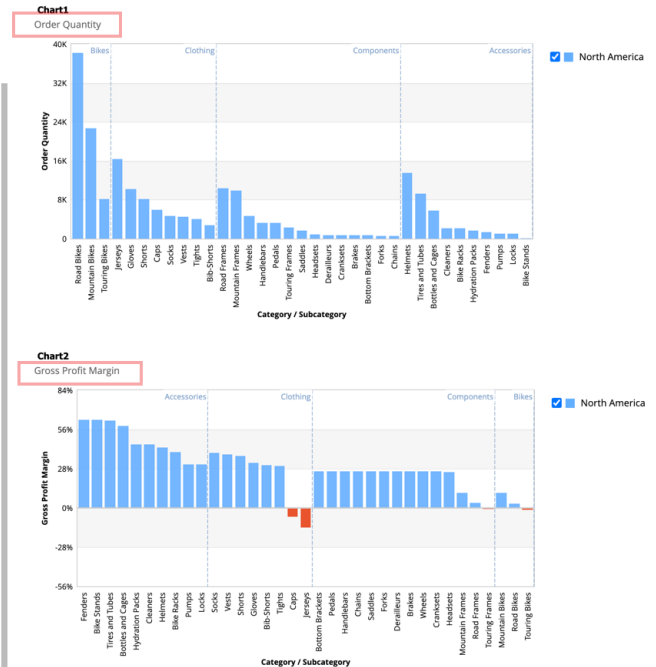
# PivotChart - Supports Chart sorting according to its own value when there is only one Column or no Column

The PivotChart now supports sorting according to its measure value when a PivotTable has only one column or no columns. In the following example, the PivotTable sorts by Sales Amount. The chart on the upper right sorts by Order Quantity. The chart on the lower-right sorts by Gross Profit Margin, which increases the flexibility of analysis.



**PivotTable1**  
Drop a Filter Condition Here

		Group		Grand Total	
Category	Subcategory	Sales Amount	Order Quantity	Sales Amount	Order Quantity
Accessories	Cleaners	\$11,694.32	2,162	\$11,694.32	2,162
	Pumps	\$11,735.79	981	\$11,735.79	981
	Locks	\$14,440.22	967	\$14,440.22	967
	Bike Stands	\$18,603.00	117	\$18,603.00	117
	Fenders	\$30,530.22	1,389	\$30,530.22	1,389
	Bottles and Cages	\$33,667.83	5,789	\$33,667.83	5,789
	Hydration Packs	\$63,740.80	1,701	\$63,740.80	1,701
	Tires and Tubes	\$128,730.90	9,259	\$128,730.90	9,259
	Bike Racks	\$155,816.18	2,086	\$155,816.18	2,086
	Helmets	\$312,483.23	13,508	\$312,483.23	13,508
<b>Accessories Subtotal</b>		<b>\$781,442.50</b>	<b>37,959</b>	<b>\$781,442.50</b>	<b>37,959</b>
Clothing	Socks	\$25,690.19	4,624	\$25,690.19	4,624
	Caps	\$33,718.25	5,862	\$33,718.25	5,862
	Bib-Shorts	\$147,157.02	2,746	\$147,157.02	2,746
	Vests	\$169,722.75	4,427	\$169,722.75	4,427
	Tights	\$180,095.35	4,069	\$180,095.35	4,069
	Gloves	\$191,386.49	10,205	\$191,386.49	10,205
	Shorts	\$334,983.02	8,180	\$334,983.02	8,180
	Jerseys	\$520,304.05	16,309	\$520,304.05	16,309
		<b>\$1,603,057.11</b>	<b>56,422</b>	<b>\$1,603,057.11</b>	<b>56,422</b>
		<b>\$1,603,057.11</b>	<b>56,422</b>	<b>\$1,603,057.11</b>	<b>56,422</b>
Components	Chains	\$6,113.54	504	\$6,113.54	504
	Bottom Brackets	\$36,073.55	641	\$36,073.55	641
	Saddles	\$40,943.54	1,586	\$40,943.54	1,586
	Brakes	\$44,208.66	693	\$44,208.66	693
	Derailleurs	\$45,540.72	751	\$45,540.72	751
	Headsets	\$54,352.92	899	\$54,352.92	899
	Forks	\$67,650.39	548	\$67,650.39	548
	Pedals	\$119,768.48	3,200	\$119,768.48	3,200
	Cranksets	\$135,864.28	746	\$135,864.28	746
	Handlebars	\$142,079.89	3,273	\$142,079.89	3,273
Bikes	Wheels	\$610,649.93	4,726	\$610,649.93	4,726
	Touring Frames	\$996,279.47	2,239	\$996,279.47	2,239
	Road Frames	\$3,352,878.37	10,407	\$3,352,878.37	10,407
	Mountain Frames	\$4,026,163.58	9,827	\$4,026,163.58	9,827
		<b>\$9,678,567.33</b>	<b>40,400</b>	<b>\$9,678,567.33</b>	<b>40,400</b>
		<b>\$9,678,567.33</b>	<b>40,400</b>	<b>\$9,678,567.33</b>	<b>40,400</b>
	Touring Bikes	\$7,599,645.20	8,065	\$7,599,645.20	8,065
	Mountain Bikes	\$27,966,136.93	22,765	\$27,966,136.93	22,765
	Road Bikes	\$31,724,512.12	38,222	\$31,724,512.12	38,222
		<b>\$67,290,294.05</b>	<b>69,052</b>	<b>\$67,290,294.05</b>	<b>69,052</b>



# PivotTable – Support "measure on row" mode to draw analysis graphs

In the past, PivotTables could only draw Pivot Charts when the measures were on the column. Starting from this version, PivotTables now also support drawing Pivot Charts when the measures are on the row.

PivotTable1

Calendar Year (None)

Sales Channel (None)

Adventure Works

Group ▾

Category ▾

Subcategory ▾

Measures ▾

Europe

North America

Pacific

Grand Total

Bikes8

Mountain Bikes

Sales Amount

\$5,506,552.01

\$27,966,136.93

\$2,972,755.00

\$36,445,443.94

Order Quantity

4,126

22,765

1,430

28,321

Gross Profit Margin

28.91%

10.87%

43.76%

16.28%

Gross Profit

\$1,592,143.56

\$3,039,959.00

\$1,300,813.58

\$5,932,916.14

Freight Cost

\$137,663.89

\$699,153.65

\$74,318.93

\$911,136.48

Extended Amount

\$5,513,262.82

\$28,136,097.84

\$2,972,935.80

\$36,622,296.45

Road Bikes

Sales Amount

\$7,146,798.45

\$31,724,512.12

\$5,007,480.44

\$43,878,791.00

Order Quantity

6,321

38,222

2,605

47,148

Gross Profit Margin

20.45%

3.15%

38.04%

9.95%

Gross Profit

\$1,461,440.60

\$998,384.16

\$1,905,077.99

\$4,364,902.75

Freight Cost

\$178,670.10

\$793,113.16

\$125,187.13

\$1,096,970.39

Extended Amount

\$7,157,786.23

\$31,782,530.07

\$5,007,480.44

\$43,947,796.74

Touring Bikes

Sales Amount

\$4,501,010.77

\$7,599,645.20

\$2,195,635.30

\$14,296,291.27

Order Quantity

4,693

8,065

1,993

14,751

Gross Profit Margin

2.32%

-1.60%

10.67%

1.52%

Gross Profit

\$104,480.57

(\$121,433.41)

\$234,230.55

\$217,277.71

Freight Cost

\$112,525.33

\$189,991.23

\$54,890.93

\$357,407.49

Extended Amount

\$4,578,737.98

\$7,742,829.06

\$2,223,506.61

\$14,545,073.65

Bikes Subtotal

Sales Amount

\$17,154,361.22

\$67,290,294.25

\$10,175,870.74

\$94,620,526.21

Order Quantity

15,140

69,052

6,028

90,220

Gross Profit Margin

18.41%

5.82%

33.81%

11.11%

Gross Profit

\$3,158,064.74

\$3,916,909.75

\$3,440,122.12

\$10,515,096.61

Freight Cost

\$428,859.32

\$1,682,258.04

\$254,396.99

\$2,365,514.36

Extended Amount

\$17,249,787.03

\$67,661,456.97

\$10,203,922.84

\$95,115,166.84

Sales Amount

\$19,639,611.05

\$78,934,912.61

\$10,579,849.04

\$109,154,372.70

Order Quantity

46,606

184,713

15,715

247,034

Gross Profit Margin

17.52%

6.67%

33.39%

11.21%

Gross Profit

\$3,440,592.38

\$5,264,923.47

\$3,532,678.32

\$12,238,194.17

Freight Cost

\$490,991.13

\$1,973,374.63

\$264,496.77

\$2,728,862.53

Extended Amount

\$19,740,944.16

\$79,328,331.71

\$10,608,374.79

\$109,677,650.66

Grand Total

Sales Amount

\$5,506,552.01

\$27,966,136.93

\$2,972,755.00

\$36,445,443.94

Order Quantity

4,126

22,765

1,430

28,321

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\$31,782,530.07

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-1.60%

10.67%

1.52%

Gross Profit

\$104,480.57

(\$121,433.41)

\$234,230.55

\$217,277.71

Freight Cost

\$112,525.33

\$189,991.23

\$54,890.93

\$357,407.49

Extended Amount

\$4,578,737.98

\$7,742,829.06

\$2,223,506.61

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Extended Amount

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\$67,661,456.97

\$10,203,922.84

\$95,115,166.84

Sales Amount

\$19,639,611.05

\$78,934,912.61

\$10,579,849.04

\$109,154,372.70

Order Quantity

46,606

184,713

15,715

247,034

Gross Profit Margin

17.52%

6.67%

33.39%

11.21%

Gross Profit

\$3,440,592.38

\$5,264,923.47

\$3,532,678.32

\$12,238,194.17

Freight Cost

\$490,991.13

\$1,973,374.63

\$264,496.77

\$2,728,862.53

Extended Amount

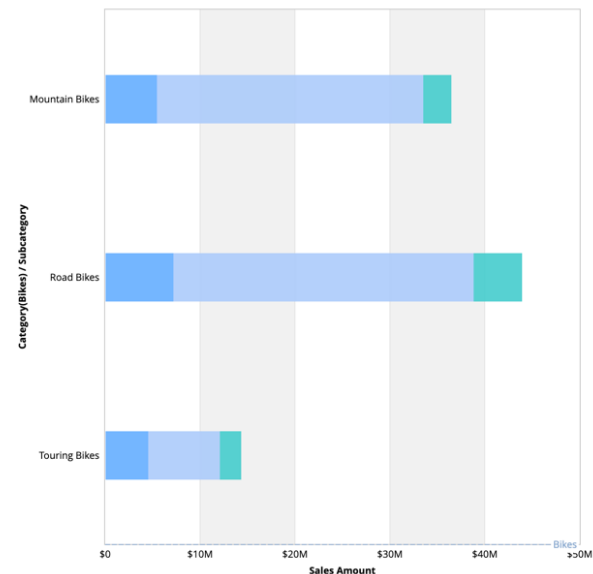
\$19,740,944.16

\$79,328,331.71

\$10,608,374.79

\$109,677,650.66

**Chart1**  
Sales Amount





# Export - Export options add the option of whether to include filter information when exporting Excel or PDF files

Sometimes a table has too many filter conditions that occupy too much space in an exported report. Therefore, the newly added "Includes Filter Information" option lets the user decide whether to include such detailed information for the Excel or PDF export file.

The User Preferences and Report Properties also have this option added as a part of the default values. Each Subscription can also set this option individually.

## x Export Options

Export Format Excel

Data Range ☐ Current Page ☒ All

Cell Style ☐ Hierarchical ☐ Flat

☐ Add Leading Space To Member

☒ Includes Filter Information

Excel Options ☐ Excel 97 (\*.xls) ☒ Excel 2007 (\*.xlsx)

Cell Format ☒ Number ☐ Keep Current

Expand All

Levels ☒ Row ☒ Column

Image Quality ☒ For Screen ☐ For Print

Export

Close

## Includes Filter Information

	A	B	C	D	E	F	G	H	I
1	PivotTable1								
2	Date Calendar - CY 2007, CY 2008								
3	Color = Black								
4	Adventure Works								
5	Group/Country/Region								
6	Europe								
7	France								
8	Germany								
9	Category	Subcategory	Product	Sales Amount	Order Quantity	Gross Profit Margin	Sales Amount	Order Quantity	Gross Profit Margin
10	Accessories	Helmets	Sport-100 Helmet, Black	\$524.85	26	31.25%	-	-	-
11			Sport-100 Helmet, Black	\$10,631.97	304	52.74%	\$11,645.66	415	53.37%
12	Helmets Subtotal			\$11,156.82	410	51.72%	\$11,645.66	415	53.37%
13	Accessories Subtotal			\$11,156.82	410	51.72%	\$11,645.66	415	53.37%
14	Bikes	Mountain Bikes	Mountain-200 Black, 38	\$65,980.96	49	17.88%	\$10,245.49	5	46.03%
15			Mountain-200 Black, 38	\$254,870.30	167	21.96%	\$136,322.41	69	36.63%
16			Mountain-200 Black, 42	\$74,996.99	49	27.75%	\$6,147.29	3	46.03%
17			Mountain-200 Black, 46	\$178,670.48	107	25.02%	\$114,290.50	57	37.56%
18			Mountain-200 Black, 46	\$25,818.64	17	27.19%	\$28,687.37	14	46.03%
19			Mountain-200 Black, 46	\$157,436.31	83	34.00%	\$139,535.39	66	40.78%
20			Mountain-200 Black, 38	\$11,015.90	17	7.65%	-	-	-

## Not Includes Filter Information

	A	B	C	D	E	F	G	H	I
1	PivotTable1								
2	Adventure Works								
3	Group/Country/Region								
4	Europe								
5	France								
6	Germany								
7	Category	Subcategory	Product	Sales Amount	Order Quantity	Gross Profit Margin	Sales Amount	Order Quantity	Gross Profit Margin
8	Accessories	Helmets	Sport-100 Helmet, Black	\$524.85	26	31.25%	-	-	-
9			Sport-100 Helmet, Black	\$10,631.97	304	52.74%	\$11,645.66	415	53.37%
10	Helmets Subtotal			\$11,156.82	410	51.72%	\$11,645.66	415	53.37%
11	Accessories Subtotal			\$11,156.82	410	51.72%	\$11,645.66	415	53.37%
12	Bikes	Mountain Bikes	Mountain-200 Black, 38	\$65,980.96	49	17.88%	\$10,245.49	5	46.03%
13			Mountain-200 Black, 38	\$254,870.30	167	21.96%	\$136,322.41	69	36.63%
14			Mountain-200 Black, 42	\$74,996.99	49	27.75%	\$6,147.29	3	46.03%
15			Mountain-200 Black, 46	\$178,670.48	107	25.02%	\$114,290.50	57	37.56%
16			Mountain-200 Black, 46	\$25,818.64	17	27.19%	\$28,687.37	14	46.03%
17			Mountain-200 Black, 46	\$157,436.31	83	34.00%	\$139,535.39	66	40.78%

## Export – Support “Flat” export option for the CSV file type

New "Flat" option for CSV export. The parent hierarchy member name is displayed for each of its child members.

▼ PivotTable1

Drop a Filter Condition Here

DataPackage 10		Calendar Year ▼					
		2017			2018		
Category ▼	SubCategory ▼	▼ Sales Amount	▼ Sales Quantity	▼ Sales Cost	▼ Sales Amount	▼ Sales Quantity	▼ Sales Cost
3C Electronics	Camera Photography	2,104,821	47	2,047,177	565,416	17	539,537
	Cell Phone & Tablet	92,360,517	2,755	87,740,743	82,077,409	2,503	77,861,418
	Computer Laptop	5,681,733	182	5,296,382	17,307,361	356	16,311,354
	Computer Parts	16,729,273	5,786	15,929,735	20,273,757	4,743	19,243,440
<b>3C Electronics Subtotal</b>		<b>116,876,34</b>					
Food & Nutrition	Beverage Mix	40,532,63					
	Frozen Food	86,539,01					
	Healthcare	12,912,47					
<b>Food &amp; Nutrition Subtotal</b>		<b>139,984,12</b>					
Household Products	Cookware	13,447,30					
	Household Cleaning	8,857,25					
	Personal Product	33,147,22					
<b>Household Products Subtotal</b>		<b>55,451,77</b>					
<b>Grand Total</b>		<b>312,312,24</b>					

### Export Options

Export Format CSV ▼

Delimiter ☐ Tab ☒ Semicolon ☐ Comma ☐ Space ☐ Other

Text Qualifier ☐ None ☒ Single Quote ☐ Double Quote

☒ Include Column Header

☒ Include Column Hierarchy ☒ Include Row Hierarchy

Cell Style ☐ Hierarchical ☒ Flat

Export Close

'Category'	'SubCategory'	'2017 Sales Amount'	'2017 Sales Quantity'	'2017 Sales Cost'
'3C Electronics'	'Camera Photography'	'2104821'	'47'	'2047177'
'3C Electronics'	'Cell Phone & Tablet'	'92360517'	'2755'	'87740743'
'3C Electronics'	'Computer Laptop'	'5681733'	'182'	'5296382'
'3C Electronics'	'Computer Parts'	'16729273'	'5786'	'15929735'
'3C Electronics'	'3C Electronics'	'116876344'	'8770'	'111014037'
'Food & Nutrition'	'Beverage Mix'	'40532632'	'746246'	'38432805'
'Food & Nutrition'	'Frozen Food'	'86539016'	'41289'	'82034453'
'Food & Nutrition'	'Healthcare'	'12912478'	'8151'	'12272657'
'Food & Nutrition'	'Food & Nutrition'	'139984126'	'795686'	'132739915'
'Household Products'	'Cookware'	'13447300'	'11834'	'12720041'
'Household Products'	'Household Cleaning'	'8857253'	'11735'	'8450316'
'Household Products'	'Personal Product'	'33147226'	'210159'	'31467408'
'Household Products'	'Household Products'	'55451779'	'233728'	'52637765'
	'Grand Total'	'312312249'	'1038184'	'296391717'

# Export Report – Add Default CSV Export Option in User Preference

To set the default CSV export options that tailor to a user's needs.

## Personal settings



Using the links below, you can read and manage pe

- › My Messages
- › My Subscriptions
- › My KPI Watch List
- › My Chart Templates
- › **Preferences**

## User Preferences

## Export Option

## CSV

Delimiter ☐ Tab ☒ Semicolon ☐ Comma ☐ Space ☐ Other:

Text Qualifier ☐ None ☒ Single Quote ☐ Double Quote

☒ Include Column Header

☒ Include Column Hierarchy ☒ Include Row Hierarchy

Cell Style ☐ Hierarchical ☒ Flat

\$106,325.41	\$8,823.74	\$10,758.95	-	\$40,831.61	-	\$166,739.71	1,982	164
\$24,391.51	\$4,143.24	\$17,143.24	\$17,143.24	\$17,143.24	\$17,143.24	\$17,143.24	\$17,143.24	\$17,143.24
\$141,532.21	\$17,143.24	\$17,143.24	\$17,143.24	\$17,143.24	\$17,143.24	\$17,143.24	\$17,143.24	\$17,143.24
\$378,832.51	\$60,000.00	\$60,000.00	\$60,000.00	\$60,000.00	\$60,000.00	\$60,000.00	\$60,000.00	\$60,000.00
\$244,737.89	\$26,000.00	\$26,000.00	\$26,000.00	\$26,000.00	\$26,000.00	\$26,000.00	\$26,000.00	\$26,000.00
\$21,143.24	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00
\$132,361.44	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00
\$121,620.66	\$22,000.00	\$22,000.00	\$22,000.00	\$22,000.00	\$22,000.00	\$22,000.00	\$22,000.00	\$22,000.00
\$170,944.86	\$151,000.00	\$151,000.00	\$151,000.00	\$151,000.00	\$151,000.00	\$151,000.00	\$151,000.00	\$151,000.00
\$28,023.03	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00
\$34,021.68	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
\$4,972.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$105,118.64	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00
\$34,339.88	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
\$51,238.81	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
\$111,615.55	\$11,000.00	\$11,000.00	\$11,000.00	\$11,000.00	\$11,000.00	\$11,000.00	\$11,000.00	\$11,000.00
\$40,156.22	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00
\$135,830.59	\$283,000.00	\$283,000.00	\$283,000.00	\$283,000.00	\$283,000.00	\$283,000.00	\$283,000.00	\$283,000.00
\$91,526.48	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00	\$9,000.00

### Export Options

Export Format CSV

Delimiter ☐ Tab ☒ Semicolon ☐ Comma ☐ Space ☐ Other:

Text Qualifier ☐ None ☒ Single Quote ☐ Double Quote

☒ Include Column Header

☒ Include Column Hierarchy ☒ Include Row Hierarchy

Cell Style ☐ Hierarchical ☒ Flat

Export Close

# Group Table- Group Item can be expanded to any level

The Group Table now allows group items to be expanded to any level as long as there is no recursive loop (for example, a child of a group is also the parent item). In addition, the indentation space of group items provides three options: large, medium, and small.

**Balance Sheet**  
Drop a Filter Condition Here

GL History

Year 2017 Quarter |

2017

Q2 2017 Q3 2017 2017 Subtotal

GL Code	* %	Amount	* %	Amount	* %
Current asse	-	46,383,386	-	46,383,386	-
Cash a	-6.5 %	(2,536,512)	-5.5 %	(2,536,512)	-5.5 %
Accou	32.8 %	14,545,026	31.4 %	14,545,026	31.4 %
Invent	71.8 %	33,260,389	71.7 %	33,260,389	71.7 %
Prepai	1.9 %	1,114,482	2.4 %	1,114,482	2.4 %
Non curren	-	16,331,758	-	16,331,758	-
Proper	95.2 %	15,553,126	95.2 %	15,553,126	95.2 %
Other	4.8 %	778,632	4.8 %	778,632	4.8 %
Current lia	-	30,758,772	-	30,758,772	-
Accou	-	6,787,396	-	6,787,396	-
Accrue	-	23,932,333	-	23,932,333	-
Corpor	-	39,043	-	39,043	-
Non curren	-	17,457	-	17,457	-
Long t	-	0	-	0	-
Other	-	17,457	-	17,457	-
Check	-	17,457	-	17,457	-
*** TC	-	17,457	-	17,457	-
*** TC	-	17,457	-	17,457	-
*** EC	-	17,457	-	17,457	-

Expand Groups

Expand to Second Level

Expand to Third Level

Expand to Fourth Level

Collapse Groups

Move Dimension to Row

Move Dimension to Column

Move Dimension to Filter

Move Left

Move Right

Set Member Property...

Change Display Name...

Group Item Indent Size ☐ Small ☒ Medium ☐ Large

Single Measure Mode ☐ Single Measure Mode

☐ Group by Measure

☐ Delete members if no displayed leaf exists when exporting

☐ Expand entire rows automatically

OK Cancel

## Group Table - Member Property Display Enhancement

The Attribute of the Group Table (such as the account title code) may have a Member Property (such as the account title name) to increase readability. Previously the Group Table would always display the member property column regardless of the expanded level that showed an empty member property column. Now the Group Table only displays the member property at the lowest level.

Balance Sheet					
Company (None)					
GL History	Year ▾ Quarter ▾				
	2019				2019 Subtotal
	Q1 2019	Q2 2019	Q3 2019	Q4 2019	
GL Code ▾	Amount	Amount	Amount	Amount	Amount
Current assets ▴	138.70M	143.05M	132.63M	139.34M	139.34M
Cash and cash items ▸	53.29M	23.67M	19.54M	27.56M	27.56M
Marketable securities ▸	9.92M	14.67M	16.74M	17.93M	17.93M
Accounts and notes receivable ▸	29.07M	27.30M	31.55M	29.94M	29.94M
Inventories ▸	33.35M	34.30M	35.49M	36.19M	36.19M
Prepaid expense ▸	8.35M	38.21M	23.75M	22.74M	22.74M
Other current assets ▸	4.71M	4.89M	5.56M	4.98M	4.98M
Non current assets ▴	112.59M	124.45M	137.55M	134.45M	134.45M
Long term investment ▸	69.21M	67.10M	63.78M	60.96M	60.96M
Property, plant and equipment ▸	5.66M	6.85M	6.76M	6.53M	6.53M
Intangible assets ▸	11.50M	23.56M	26.63M	25.79M	25.79M
Restricted assets ▸	12.47M	12.55M	24.70M	25.44M	25.44M
Other assets ▸	0.27M	0.28M	0.31M	0.35M	0.35M
Deferred income tax	13.48M	14.11M	15.37M	15.37M	15.37M
TOTAL ASSETS	251.29M	267.50M	270.18M	273.79M	273.79M

Balance Sheet							
▼ Company (None)							
GL History			Year ▼ Quarter ▼				
			2019				
GL Code ▼	Department	ACCOUNT TYPE	Q1 2019 ▼ Amount	Q2 2019 ▼ Amount	Q3 2019 ▼ Amount	Q4 2019 ▼ Amount	2019 Subtotal ▼ Amount
Current assets ▲			138.70M	143.05M	132.63M	139.34M	139.34M
Cash and cash items ▲			53.29M	23.67M	19.54M	27.56M	27.56M
11010-000	000	Assets	36,178,381.61	6,276,293.20	1,209,969.37	8,126,200.07	8,126,200.07
11011-000	000	Assets	0.00	1,216,548.22	463,647.38	0.00	0.00
11012-000	000	Assets	105,704.05	1,274,632.92	1,011,284.11	772,312.21	772,312.21
11014-000	000	Assets	85,835.78	45,370.30	106,711.08	233,144.30	233,144.30
11020-000	000	Assets	0.00	0.00	0.00	0.00	0.00
11050-000	000	Assets	0.00	0.00	0.00	47,092.13	47,092.13
11060-000	000	Assets	12,725.41	6,913.47	5,363.81	7,104.36	7,104.36
11065-000	000	Assets	162,055.82	162,055.82	256,412.25	386,729.84	386,729.84
11070-000	000	Assets	764.34	979.60	648.58	154.07	154.07
11200-000	000	Assets	2,834,352.63	658,398.74	2,301,585.33	3,085,529.32	3,085,529.32
11201-000	000	Assets	2,245,356.51	2,362,663.11	2,512,682.37	3,233,246.90	3,233,246.90
11202-000	000	Assets	11,669,494.46	11,670,322.34	11,671,279.53	11,672,226.52	11,672,226.52
11205-000	000	Assets	0.00	0.00	0.00	0.00	0.00
11230-000	000	Assets	0.00	0.00	0.00	0.00	0.00
Marketable securities ▶			9.92M	14.67M	16.74M	17.93M	17.93M
Accounts and notes receivable ▶			29.07M	27.30M	31.55M	29.94M	29.94M
Inventories ▶			33.35M	34.30M	35.49M	36.19M	36.19M
Prepaid expense ▶			8.35M	38.21M	23.75M	22.74M	22.74M
Other current assets ▶			4.71M	4.89M	5.56M	4.98M	4.98M



## Group Table – New Aggregation for GroupItem

Added the option of specifying the Aggregate Function for the Group Item in the Group Table. In addition to the original Aggregate, users can also select different functions such as Sum, Count, Min, Max, DistinctCount, etc., which increases the practicality of GroupItem. Except for Calculation GroupItem, other types of GroupItems support this option.

Dimension: Product  
 Attribute: Product  
 Name:   
 Caption:   
 Format String:  Solve Order:   
 Display As: ☒ Available ☒ Expandable ☒ Calculable  
 Behavior: ☐ Individual Members ☐ Group Item  
 Aggregation: Aggregate  
 Filter Type: ☒ Label Filter ☐ Value Filter ☐ Date Filter  
 \* Subcategory Equals   
 Add Criteria Remove Criteria  
 Filter Criterion  
☐ \* Color equals Black  
☐ \* Subcategory equals Mountain Bikes

Filterable Members  
☒ Mountain-100 Black, 38  
☒ Mountain-100 Black, 42  
☒ Mountain-100 Black, 44  
☒ Mountain-100 Black, 48  
☒ Mountain-200 Black, 38  
☒ Mountain-200 Black, 38  
☒ Mountain-200 Black, 42  
☒ Mountain-200 Black, 42  
☒ Mountain-200 Black, 46  
☒ Mountain-200 Black, 46  
☒ Mountain-300 Black, 38  
☒ Mountain-300 Black, 40  
☒ Mountain-300 Black, 44  
☒ Mountain-300 Black, 48  
☒ Mountain-500 Black, 40  
☒ Mountain-500 Black, 42  
☒ Mountain-500 Black, 44  
☒ Mountain-500 Black, 48  
☒ Mountain-500 Black, 52

**GroupTable1**

Drop a Filter Condition Here

Adventure Works	Drop a Column Dimension Here	
Product	Sales Amount	Order Quantity
Black Mountain Bikes	\$2,589,363.78	1,613
Mountain-100 Black, 38	\$1,339,997.25	682
Mountain-100 Black, 42	\$1,254,722.73	634
Mountain-100 Black, 44	\$1,365,852.38	678
Mountain-100 Black, 48	\$1,234,276.03	616
Mountain-200 Black, 38	\$1,811,229.02	1,364
Mountain-200 Black, 38	\$2,589,363.78	1,613
Mountain-200 Black, 42	\$1,744,009.38	1,297
Mountain-200 Black, 42	\$2,265,485.38	1,367
Mountain-200 Black, 46	\$1,352,144.97	967
Mountain-200 Black, 46	\$1,957,528.24	1,144
Mountain-300 Black, 38	\$442,477.09	684
Mountain-300 Black, 40	\$501,648.88	776
Mountain-300 Black, 44	\$484,051.52	747
Mountain-300 Black, 48	\$479,071.90	740
Mountain-500 Black, 40	\$101,734.12	282
Mountain-500 Black, 42	\$136,293.48	388
Mountain-500 Black, 44	\$125,925.67	350
Mountain-500 Black, 48	\$157,569.08	449
Mountain-500 Black, 52	\$96,982.20	272
<b>Grand Total</b>	<b>\$19,440,363.10</b>	<b>15,050</b>

## Group Table – Fixed incorrect percentage calculation with Calculation Filter - Total Displayed and Others.

GroupTable2		Drop a Column Dimension Here				
Calendar Year CY 2008						
Adventure Works						
Reseller	Subcategory	Reseller Sales Amount	Reseller Sales Amount%	Reseller Sales Amount LY	Reseller Sales Amount Growth	Reseller Sales Amount Growth%
All Reseller		\$16,038,062.60	100.00%	\$32,202,669.43	(\$16,164,606.83)	-50.20%
Roadway Bicycle Supply	Subcategory	\$220,496.66	100.00%	\$216,425.00	\$4,071.66	1.88%
	Touring Bikes	\$203,653.55	92.36%	\$184,483.14	\$19,170.41	10.39%
	Touring Frames	\$10,840.04	4.92%	\$22,471.52	(\$11,631.49)	-51.76%
	Cranksets	\$3,928.39	1.78%	\$3,272.29	\$656.09	20.05%
	Derailleurs	\$767.57	0.35%	\$1,936.75	(\$1,169.18)	-60.37%
	Brakes	\$639.00	0.29%	\$1,681.55	(\$1,042.55)	-62.00%
	<b>Total Displayed (5)</b>	\$219,828.54	19.94%	\$213,845.25	\$5,983.29	-28.74%
	<b>Others (6)</b>	\$668.12	0.05%	\$2,579.74	(\$1,127.16)	-27.82%
<b>Roadway Bicycle Supply Subtotal</b>		\$220,496.66	1.37%	\$216,425.00	\$4,071.66	1.88%
Westside Plaza		\$210,647.49	1.31%	\$324,308.79	(\$113,661.29)	-35.05%
Thorough Parts and Repair Services		\$187,964.84	1.17%	\$294,930.72	(\$106,965.87)	-36.27%
Field Trip Store		\$186,387.56	1.16%	\$368,440.99	(\$182,053.42)	-49.41%
Brakes and Gears		\$179,916.29	1.12%	\$361,627.85	(\$181,711.56)	-50.25%
Perfect Toys		\$175,358.40	1.09%	\$215,682.19	(\$40,323.80)	-18.70%
Rally Master Company Inc		\$172,169.46	1.07%	\$182,972.52	(\$10,803.06)	-5.90%
Action Bicycle Specialists		\$157,700.60	0.98%	\$164,052.23	(\$6,351.63)	-3.87%
Global Bike Retailers		\$156,984.51	0.98%	\$180,772.22	(\$23,787.70)	-13.16%
Rural Cycle Emporium		\$151,824.99	0.95%	\$219,306.17	(\$67,481.17)	-30.77%
<b>Total Displayed (10)</b>		\$1,799,450.81	1.12%	\$2,528,518.67	(\$729,067.85)	-24.15%
<b>Others (556)</b>		\$14,238,611.78	0.16%	\$29,674,150.76	(\$13,177,195.80)	10.99%
<b>Grand Total</b>		\$16,038,062.60	-	\$32,202,669.43	(\$16,164,606.83)	-50.20%

# Data Package 2.0 – Added option to create Tabular Mode Cube

This version adds the option to create Tabular Cubes. Users can choose between Multi-Dimensional or Tabular Mode cubes, which increases flexibility. In addition to Member Properties, Tabular Mode also supports all the same functions as Multi-Dimensional Mode, including all Time Intelligence functions.

## DataPackage Settings

Name  
Training Cube

Description

Advanced Settings

Database Name  
Training Cube

Cube Name  
Training Cube

Default Dimension Type  
Regular

Process Data Scope  
☒ All ☐ Filtered

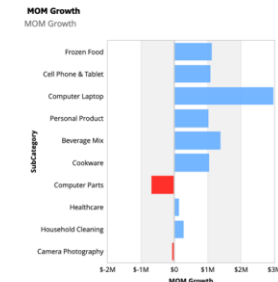
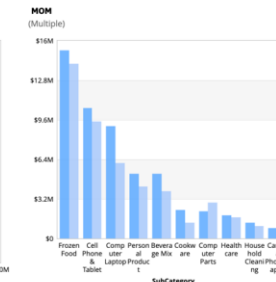
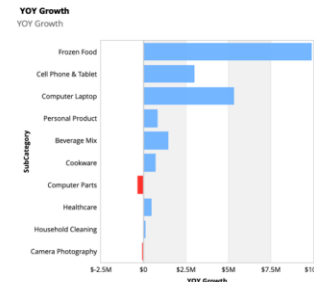
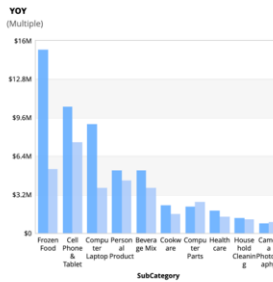
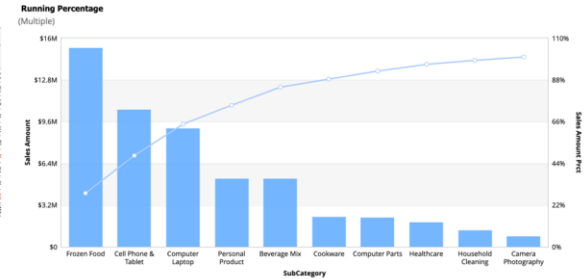
Database Type  
☐ Multidimensional ☒ Tabular

Ok Cancel

Monthly Growth Analysis  
Calendar Y-M-D December

Sales Analyzer Tabular Mode

SubCategory	Sales Amount	Running %	Previous Year	YOY Growth	YOY Growth %	Previous Month	MOM Growth	MOM Growth %
Frozen Food	\$15,236,943	28.36%	\$1,343,956	\$9,893,037	185.13%	\$14,107,979	\$1,128,070	8.1
Cell Phone & Tablet	\$10,528,459	19.60%	\$7,537,470	\$2,990,989	39.68%	\$9,642,822	\$1,085,637	11.1
Computer Laptop	\$9,071,218	16.88%	\$3,755,397	\$5,315,821	141.55%	\$6,096,986	\$2,974,232	48.7
Personal Product	\$5,219,374	9.71%	\$4,368,907	\$849,467	19.44%	\$4,192,751	\$1,026,623	24.4
Beverage Mix	\$5,213,682	9.70%	\$3,765,804	\$1,447,878	38.45%	\$3,824,358	\$1,389,324	36.1
Cookware	\$2,289,789	4.26%	\$1,580,650	\$709,139	44.86%	\$1,250,058	\$1,039,731	83.1
Computer Parts	\$2,214,103	4.12%	\$2,575,678	(\$361,575)	-14.17%	\$2,893,787	(\$679,684)	-23.4
Healthcare	\$1,865,686	3.47%	\$6,111	\$1,380,139	35.18%	\$1,732,560	\$133,126	7.7
Household Cleaning	\$1,268,065	2.36%	\$8,471	\$1,142,927	10.95%	\$979,575	\$268,400	29.4
Camera Photography	\$822,541	1.53%	\$892,762	(\$70,221)	-7.87%	\$883,518	(\$60,977)	-6.1
Grand Total	\$53,729,860	100.00%	\$32,348,640	\$21,381,220	66.10%	\$45,404,388	\$8,325,472	18.2



# Data Package 2.0 – Process Attribute As Address

Data Package 2.0 can now automatically convert address fields into a geographic hierarchy. Using the Geography Analysis template, you can automatically generate a Map Universal Chart based on the data. It can parse an attribute with complete address information or combine multiple fields like country, state, city, and street address to create a geo-hierarchy and produce a Geojson file to create a map, saving the user from having to do it manually.

```
addressprocessor - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8" ?>
<Config>
  <GoogleKey>AIzaSyCpRqS51_BdYQAdBDFoJs1kL0c5LH_39g</GoogleKey>
  <NominatimURL>http://98.190.215.221:3000</NominatimURL>
  <Directory>~/uchart/charts/leafletChart/generatedMaps</Directory>
</Config>
```

Before using the **Process As Address** function, make sure the content of the "*addressprocessor.config*" file has been edited correctly in the Config directory.

Content includes:

- GoogleKey: Security Key for your company to use Google Address Services account. It needs to be obtained through Google separately.
- URL: SCC Geojson Server processing URL - <http://98.190.215.221:3000>
- Directory: The location to store the Geojson file created by the user, generally set to ~\uchart\charts\leafletChart\generatedMaps

Address	Invoice Number	Column Name	Entity	Data Type
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-09-01	Invoice Date	'Store Sales 2017-2020\$'	DateTime
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-10-01	CID	'Store Sales 2017-2020\$'	String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-11-01	Company Name	Customers\$	String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-12-01	City	Customers\$	String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-16-01	State	Customers\$	String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-18-01	Country	Customers\$	String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-20-01	Job Function	Customers\$	String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-20-01	Job Level	Customers\$	String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-20-02	Industry	Customers\$	String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010001-20-02	Running Capital	Customers\$	Decimal
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010002-01-01	Address	Customers\$	String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010002-01-02	Lookup Columns		20\$' String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010003-01-01	Consolidate		20\$' String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010003-02-01	Discretize		20\$' String
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010003-03-01	Show Statistics		20\$' Decimal
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010003-08-01	Set Key		20\$' Decimal
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010003-13-01	Set Address as Measure		20\$' Decimal
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010004-01-01	Create New Hierarchy		
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010004-02-01	Process as Address		
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010004-04-01	Duplicate Address		
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010004-05-01	Hide Address		
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010004-09-01	Remove Address		
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010004-20-01			
5200 Blue Lagoon Dr # 130, Miami, FL 33126, US	HC17010004-21-01			

## Process Attribute as Address

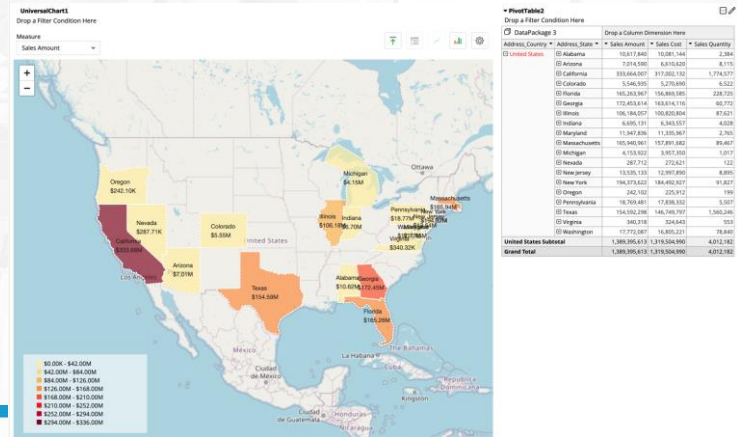
Hierarchy Name

☒ Geocode string address

- Select Levels
- ☒ Country
  - ☒ State
  - ☒ County
  - ☒ City
  - ☒ Neighborhood
  - ☐ Street
  - ☒ Postal Code
  - ☐ Street Number

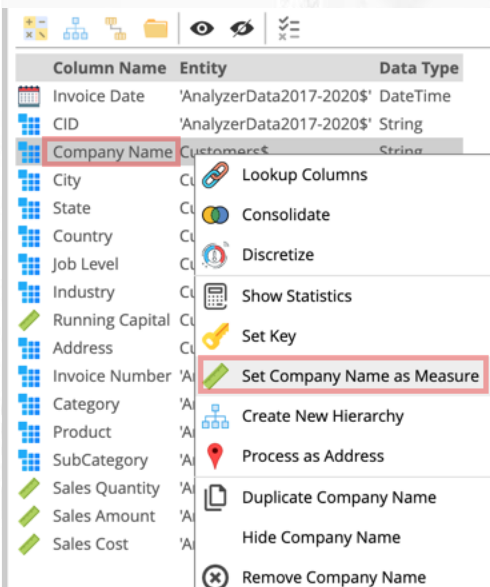
Language

Ok Cancel



# Data Package 2.0 Supports non-numerical fields as a measure

Previously, a measure had to be from a numerical field—however, this version supports converting non-numerical fields to measures. This type of measure uses either Count or DistinctCount to aggregate. The example below uses distinct count to find out how many unique customers purchased a particular product.



Column Name	Entity	Data Type
Invoice Date	'AnalyzerData2017-2020\$'	DateTime
CID	'AnalyzerData2017-2020\$'	String
Company Name	Customer\$	String
City		Lookup Columns
State		Consolidate
Country		Discretize
Job Level		Show Statistics
Industry		Set Key
Running Capital		Set Company Name as Measure
Address		Create New Hierarchy
Invoice Number		Process as Address
Category		Duplicate Company Name
Product		Hide Company Name
SubCategory		Remove Company Name
Sales Quantity		
Sales Amount		
Sales Cost		

## Measure Settings

Name  
Customer Count

Aggregation  
DistinctCount

Display Folder  
Standard

☒ Default Format Strings  
☐ Custom Format String

Ok Cancel

## PivotTable1

Drop a Filter Condition Here

		Year					
		2017		2018		2019	
Category	SubCategory	Sales Amount	Customer Count	Sales Amount	Customer Count	Sales Amount	Customer Count
3C Electronics	Camera Photography	679,374	14	1,451,828	19	322,141	13
	Cell Phone & Tablet	141,543,438	107	141,699,772	119	128,227,163	144
	Computer Laptop	1,837,439	31	4,273,728	40	1,980,131	27
	Computer Parts	12,879,165	50	12,026,033	47	7,154,716	53
3C Electronics Subtotal		156,939,416	112	159,451,361	128	137,684,151	156
Food & Nutrition	Beverage Mix	36,115,612	64	35,671,396	72	43,138,619	71
	Frozen Food	49,673,186	87	52,502,733	99	47,215,577	109
	Healthcare	13,335,931	48	17,160,438	58	21,486,053	69
Food & Nutrition Subtotal		99,124,729	109	105,334,567	126	111,840,249	143
Household Products	Cookware	11,560,923	57	14,585,825	51	16,310,052	66
	Household Cleaning	8,231,077	47	11,271,258	52	6,728,848	51
	Personal Product	36,456,104	72	43,755,472	85	40,559,869	99
Household Products Subtotal		56,248,104	96	69,612,555	107	63,598,769	133
Grand Total		312,312,249	151	334,398,483	187	313,123,169	239



# Data Package 2.0 – Added the Semester level to Time Dimension

This version adds the option of a Semester level for Calendar, Fiscal Calendar, and Accounting time dimensions. It can generate Semester and Semester of Year attributes and automatically establish Y-H-Q-M-D Hierarchy, which is convenient for semi-annual report analysis.

## Configure Calendar

☒ Enabled

Date Attributes

Attribute	Member Prefix	Member Suffix	Expression
<input checked="" type="checkbox"/> Year			
<input checked="" type="checkbox"/> Semester			
<input checked="" type="checkbox"/> Quarter			
<input checked="" type="checkbox"/> Month			
<input checked="" type="checkbox"/> Week			
<input checked="" type="checkbox"/> Day			
<input type="checkbox"/> Hour			
<input type="checkbox"/> Minute			

Date Hierarchies

☒ Y-M-D

☒ Y-Q-M-D

☒ Y-H-Q-M-D

☐ Y-Q-M-W-D

☐ Y-W

☐ Y-M-D-H

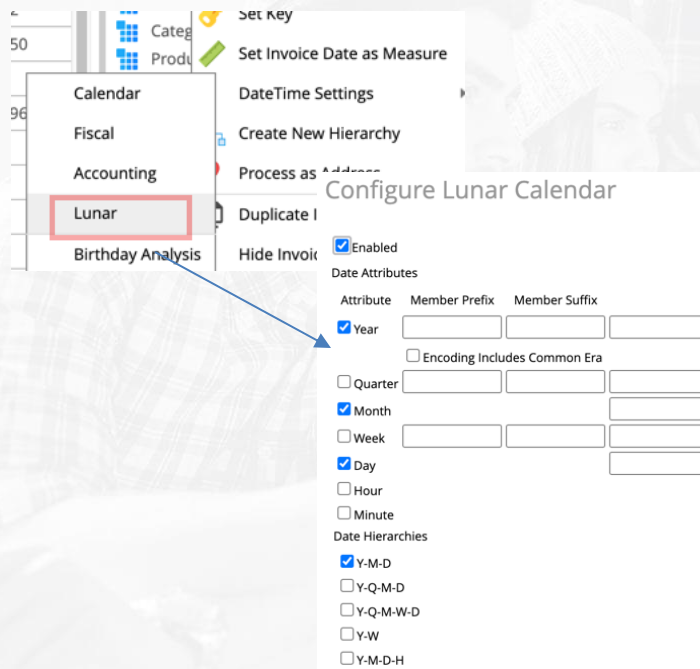
Ok Cancel

- Store Sales Sample
  - Dimensions
    - Invoice Date
      - 445
    - Calendar
      - Calendar Quarter
      - Calendar Quarter of Year
      - Calendar Semester
      - Calendar Semester of Year
      - Calendar Week
      - Calendar Week of Year
      - Calendar Year
      - Calendar Y-H-Q-M-D
      - Calendar Y-M-D
      - Calendar Y-Q-M-D
      - Calendar Y-W
    - Fiscal
      - Date
      - Day Name
      - Day of Month
      - Month
      - Month of Year
      - Short Date

Store Sales Sample				Category ▾												
				3C Electronics				Food & Nutrition				Household Products				
Year ▾	Semester ▾	Quarter ▾	Month ▾	▴ Sales Amount	▴ Sales Quantity	▴ Gross Profit	▴ Gross Profit Margin	▴ Sales Amount	▴ Sales Quantity	▴ Gross Profit	▴ Gross Profit Margin	▴ Sales Amount	▴ Sales Quantity	▴ Gross Profit	▴ Gross Profit Margin	
2017	H1 2017	Q1 2017	January 2017	7,570,400	289	376,123	4.97%	5,187,619	24,690	304,962	5.88%	2,726,392				
			February 2017	8,908,657	562	461,554	5.18%	10,043,141	53,101	464,182	4.62%	4,536,696				
			March 2017	10,039,868	572	550,529	5.48%	11,703,484	64,578	572,447	4.89%	4,789,128				
		Q1 2017 Subtotal			26,518,925	1,423	1,388,206	5.23%	26,934,244	142,369	1,341,591	4.98%	12,052,216			
		Q2 2017	April 2017	10,597,822	812	549,520	5.19%	11,362,335	70,819	520,800	4.58%	4,638,447				
			May 2017	8,219,752	682	393,913	4.79%	10,579,352	72,933	465,710	4.40%	4,368,186				
			June 2017	8,367,297	390	423,991	5.07%	12,520,955	54,172	762,355	6.09%	4,681,678				
		Q2 2017 Subtotal			27,184,871	1,884	1,367,424	5.03%	34,462,642	197,924	1,748,865	5.07%	13,688,311			
		H1 2017 Subtotal			53,703,796	3,307	2,755,630	5.13%	61,396,886	340,293	3,090,456	5.03%	25,740,527			
		H2 2017	Q3 2017	July 2017	10,246,852	920	555,927	5.43%	15,466,384	81,912	786,050	5.08%	6,157,978			
	August 2017			8,307,288	845	413,804	4.98%	14,921,621	86,175	693,399	4.65%	4,500,017				
	September 2017			13,205,513	1,696	756,155	5.73%	16,575,323	109,198	670,943	4.05%	5,586,336				
	Q3 2017 Subtotal			31,759,653	3,461	1,725,886	5.43%	46,963,328	277,285	2,150,392	4.58%	16,244,331				
	Q4 2017		October 2017	8,777,082	526	445,866	5.08%	10,703,266	51,810	475,840	4.45%	4,101,505				
			November 2017	12,187,087	684	645,709	5.30%	11,824,004	71,728	596,040	5.04%	4,366,591				
			December 2017	10,448,726	792	514,058	4.92%	9,096,642	54,570	482,665	5.31%	4,998,825				
	Q4 2017 Subtotal			31,412,895	2,002	1,605,633	5.11%	31,623,912	178,108	1,554,545	4.92%	13,466,921				
	H2 2017 Subtotal			63,172,548	5,463	3,331,519	5.27%	78,587,240	455,393	3,704,937	4.71%	29,711,252				
	2017 Subtotal			116,876,344	8,770	6,087,149	5.21%	139,984,126	795,686	6,795,393	4.85%	55,451,779				

# Data Package 2.0 – Supports Lunar Calendar Time Dimension

Lunar Calendars provide users with the ability to analyze the influence of traditional Lunar Holidays on sales data, which is suitable for trend and growth analysis in the retail food industry in Asian markets, for example.



**Configure Lunar Calendar**

**Calendar**

- Calendar
- Fiscal
- Accounting
- Lunar**
- Birthday Analysis

**Date Attributes**

☒ Year

☐ Quarter

☒ Month

☐ Week

☒ Day

☐ Hour

☐ Minute

**Date Hierarchies**

☒ Y-M-D

☐ Y-Q-M-D

☐ Y-Q-M-W-D

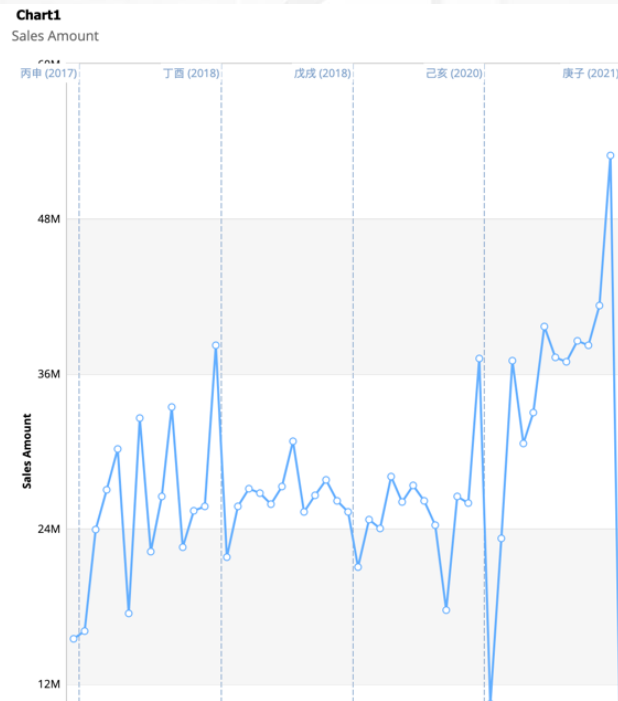
☐ Y-W

☐ Y-M-D-H

**PivotTable1**

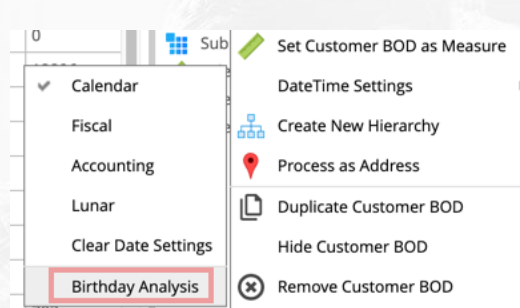
Drop a Filter Condition Here

DataPackage 10		Drop a Column Dimension Here		
Year	Month	Sales Amount	Sales Quantity	Sales Cost
丙申 (2017)	丙申 (2017) 十二月	15,484,411	35,923	14,727,328
<b>丙申 (2017) Subtotal</b>		<b>15,484,411</b>	<b>35,923</b>	<b>14,727,328</b>
丁酉 (2018)	丁酉 (2018) 正月	16,067,694	27,181	15,266,923
	丁酉 (2018) 二月	23,930,886	74,025	22,740,982
	丁酉 (2018) 三月	27,050,603	87,440	25,752,208
	丁酉 (2018) 四月	30,159,091	122,458	28,597,327
	丁酉 (2018) 五月	17,462,337	46,990	16,524,619
	丁酉 (2018) 六月	32,581,672	122,890	31,111,061
	丁酉 (2018) 閏六月	22,230,049	93,710	21,271,373
	丁酉 (2018) 七月	26,506,911	144,241	25,023,186
	丁酉 (2018) 八月	33,401,816	77,383	31,547,968
	丁酉 (2018) 九月	22,569,404	70,231	21,346,575
	丁酉 (2018) 十月	25,379,405	68,837	23,959,012
	丁酉 (2018) 十一月	25,750,163	71,037	24,456,667
	丁酉 (2018) 十二月	38,222,599	102,071	36,319,406
<b>丁酉 (2018) Subtotal</b>		<b>341,312,630</b>	<b>1,108,494</b>	<b>323,917,307</b>
戊戌 (2018)	戊戌 (2018) 正月	21,837,175	49,159	20,692,274
	戊戌 (2018) 二月	25,692,886	75,843	24,394,104
	戊戌 (2018) 三月	27,094,001	62,574	25,629,695
	戊戌 (2018) 四月	26,731,657	80,492	25,286,565
	戊戌 (2018) 五月	25,870,031	64,591	24,628,653
	戊戌 (2018) 六月	27,292,617	76,592	26,007,710
	戊戌 (2018) 七月	30,743,624	80,541	29,154,133
	戊戌 (2018) 八月	25,267,730	59,361	24,089,222
	戊戌 (2018) 九月	26,571,870	48,729	25,240,486



## Data Package - Birthday Analysis

For birthdays (a Date-type field), Data Packages can automatically generate related fields such as constellation, zodiac, age, etc., providing a valuable multi-level consumer spending habit on groups in addition to simple date analysis.



### Birthday Analysis

- ☒ Zodiac Sign
- ☒ Chinese Zodiac Sign
- ☒ Age

Ok

Cancel



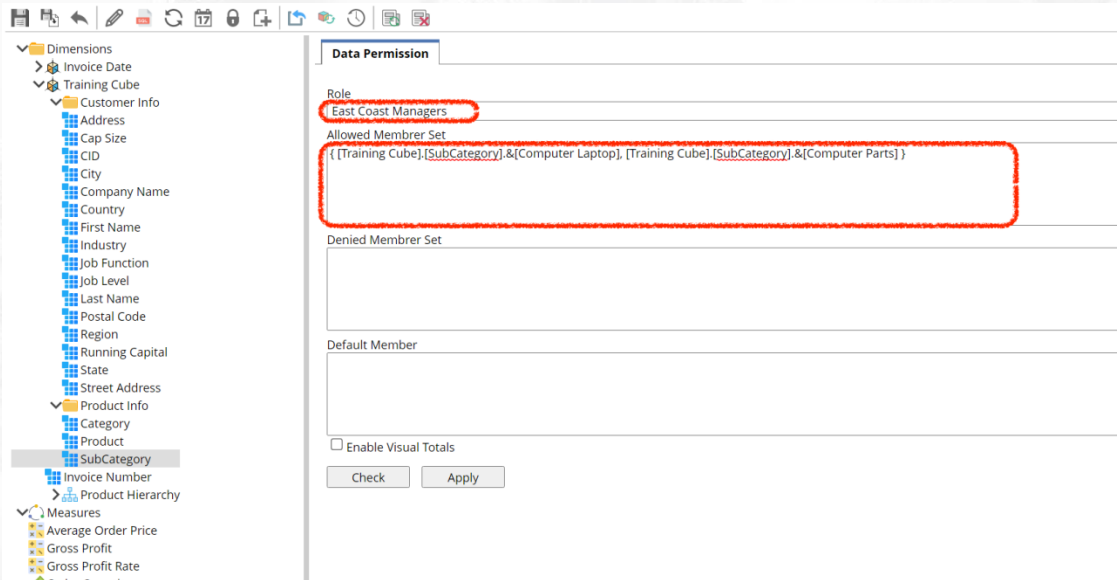
### PivotTable1

Drop a Filter Condition Here

Sales Analysis						
Category						
3C Electronics		Food & Nutrition		Household Products		
Zodiac	Sales Quantity	Sales Quantity %	Sales Quantity	Sales Quantity %	Sales Quantity	Sales Quantity %
Capricorn	3,607	10.57%	341,331	9.05%	124,747	9.13%
Cancer	3,553	10.41%	397,830	10.55%	127,851	9.36%
Virgo	3,342	9.79%	368,982	9.79%	119,988	8.78%
Gemini	3,236	9.48%	352,616	9.35%	127,530	9.33%
Leo	3,222	9.44%	382,025	10.13%	140,144	10.26%
Libra	3,041	8.91%	376,837	10.00%	122,501	8.96%
Aries	2,919	8.55%	339,331	9.00%	117,801	8.62%
Taurus	2,837	8.31%	295,079	7.83%	123,785	9.06%
Pisces	2,403	7.04%	232,578	6.17%	98,892	7.24%
Scorpio	2,244	6.58%	276,008	7.32%	103,576	7.58%
Aquarius	1,926	5.64%	183,024	4.86%	68,303	5.00%
Sagittarius	1,793	5.25%	224,152	5.95%	91,337	6.68%
<b>Grand Total</b>	<b>34,123</b>	<b>100.00%</b>	<b>3,769,793</b>	<b>100.00%</b>	<b>1,366,455</b>	<b>100.00%</b>

# Data Package 2.0 – Security added Allowed Members and Denied Members

Every Data Package security role can have its member access privilege configured individually so that different security roles can view different attribute members.



**Dimensions**

- Invoice Date
- Training Cube
  - Customer Info
    - Address
    - Cap Size
    - CID
    - City
    - Company Name
    - Country
    - First Name
    - Industry
    - Job Function
    - Job Level
    - Last Name
    - Postal Code
    - Region
    - Running Capital
    - State
    - Street Address
  - Product Info
    - Category
    - Product
    - SubCategory
  - Invoice Number
  - Product Hierarchy

- Measures
- Average Order Price
- Gross Profit
- Gross Profit Rate
- Order Quantity

**Data Permission**

Role  
East Coast Managers

Allowed Member Set  
{ [Training Cube].[SubCategory].&[Computer Laptop], [Training Cube].[SubCategory].&[Computer Parts] }

Denied Member Set

Default Member

☐ Enable Visual Totals

Check Apply

# Data Package 2.0 - Lookup Columns Added Left-Outer-Join option

Left-Outer-Join Option - to avoid the Lookup being unable to find corresponding values, which reduces the number of transactions in the Transaction Table, which in turn causes the totals to be inaccurate.

## Lookup Columns

Destination Entity

democustomerseng.xls.Customers\$ ▼

Source Columns	Destination Columns
CID	CID

### Lookup Columns

- ☐ CID
- ☒ Company Name
- ☐ Street Address
- ☒ City
- ☒ State
- ☐ Postal Code
- ☒ Country
- ☒ First Name
- ☒ Last Name
- ☐ Job Function
- ☒ Outer Join

Ok

Cancel

1	2	3	4	5	...	566	
First Name	Last Name	Invoice Number	Category	Product	SubCategory		
Terry	Warren	HC17010001-09-01	Food & Nutrition	Seafood Products	Frozen Food		
Terry	Warren	HC17010001-10-01	Food & Nutrition	Mix Drinks	Beverage Mix		
Terry	Warren	HC17010001-11-01	Food & Nutrition	Mix Drinks	Beverage Mix		
Terry	Warren	HC17010001-12-01	3C Electronics	iPhone	Cell Phone & Tablet		
Terry	Warren	HC17010001-16-01	Household Products	Toilet Paper	Personal Product		
Terry	Warren	HC17010001-18-01	3C Electronics	iPhone	Cell Phone & Tablet		
Terry	Warren	HC17010001-20-01	3C Electronics	Memory Module	Computer Parts		
Terry	Warren	HC17010001-20-02	3C Electronics	Memory Module	Computer Parts		
Terry	Warren	HC17010002-01-01	Food & Nutrition	Frozen Food	Frozen Food		
Terry	Warren	HC17010002-01-02	Food & Nutrition	Frozen Food	Frozen Food		
Terry	Warren	HC17010003-01-01	3C Electronics	iPhone	Cell Phone & Tablet		
Terry	Warren	HC17010003-02-01	3C Electronics	iPhone	Cell Phone & Tablet		
Terry	Warren	HC17010003-03-01	3C Electronics	iPhone	Cell Phone & Tablet		
Terry	Warren	HC17010003-08-01	3C Electronics	iPhone	Cell Phone & Tablet		
Terry	Warren	HC17010003-13-01	3C Electronics	Memory Module	Computer Parts		
Terry	Warren	HC17010004-01-01	Household Products	Tampon	Personal Product		
Terry	Warren	HC17010004-02-01	3C Electronics	iPhone	Cell Phone & Tablet		
Terry	Warren	HC17010004-04-01	3C Electronics	iPhone	Cell Phone & Tablet		
Terry	Warren	HC17010004-05-01	3C Electronics	iPhone	Cell Phone & Tablet		
Terry	Warren	HC17010004-09-01	3C Electronics	iPhone	Cell Phone & Tablet		



## Bug Fixes

- FS#3268 - Fixed the problem that PivotTable calculates the number of pages incorrectly when totals are hidden (Beta44)
- Merged 2018-SP2 CSV Export fix (Beta44)
- After executing the upgrade program, if the database is not updated, the Manual Upgrade page cannot be opened, and the database must be updated from the SQL under the backend database (Beta44)
- FS#4063 - "Report Auto Scaling," it should be set as the default value of Auto Scaling for new reports, but now the settings are not applied when adding reports. (Beta42)
- Fix the Define Sorting Rule dialog in the Measure menu from Customize Sorting Rule to Define Sorting Rule (Iqvia)
- Add database field (beta42). Need to verify after installing the upgrade program, whether the manual upgrade has done the database upgrade.

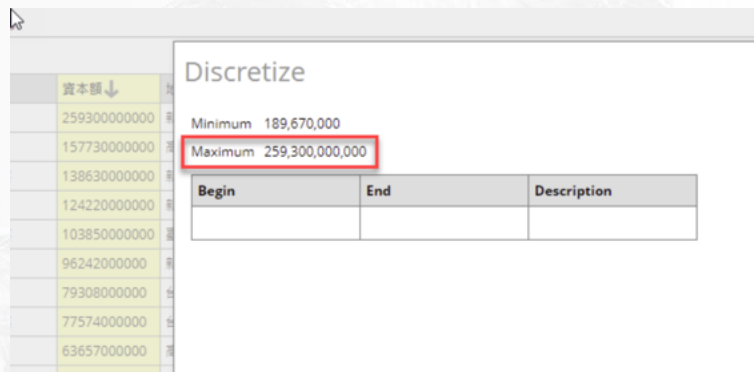
The following SQL can also directly update the database

```
ALTER TABLE UserProfiles ADD CsvDelimiter char(1) NULL DEFAULT ',';  
ALTER TABLE UserProfiles ADD CsvQualifier char(1) NULL DEFAULT '\"';  
ALTER TABLE UserProfiles ADD CsvColumnHeader char(1) NULL DEFAULT 'Y';  
ALTER TABLE UserProfiles ADD CsvColumnHierarchy char(1) NULL DEFAULT 'N';  
ALTER TABLE UserProfiles ADD CsvRowHierarchy char(1) NULL DEFAULT 'N';  
ALTER TABLE UserProfiles ADD CsvCellHierarchy char(1) NULL DEFAULT 'Y';
```

(Bug) The automatic calculation ratio in PivotTable is required to add IIF( IsEmpty(Sales Date.Calendar Year).CurrentMember.Parent), 1,...

## Bug Fixes

- Fixed an issue where the maximum value displayed in the Discretize function would become negative if the value used in the Data Package were too large



Discretize

Minimum 189,670,000

Maximum 259,300,000,000

Begin	End	Description

- FS#4060: When TreeMap is exported to Excel, the top row of words is blocked
- 2021RC06-05(FS#4059): When PivotTable contains MemberProperty, export CSV with RowHierarchy enabled, the result is incorrect
- 2021RC06-02 (FS#4056): Measures on row axis and with rows expanded, exporting CSV-Flat, the result is different from exporting Excel-flat
- FS#NNNN - Fix Data Package connection Oracle R11g Import Data has a method not supported error (Beta44)

**2021 SP1 will change from the current .NET framework 4.6.1 to .NET framework 4.8**

**Therefore, the development environment needs to install the following:**

**<https://dotnet.microsoft.com/download/dotnet-framework/net48>**

# Thank You

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