



QUICK START GUIDE



Version 4.00

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Summary

1	Introduction.....	3
2	Viewer Edition	3
2.1	Menu Bar.....	4
2.2	ABC Curve.....	11
2.3	Pivoting Areas.....	12
3	Personal Edition.....	13
3.1	Menu Bar.....	14

1 Introduction

BXBanalytics is a tool that allows the user to explore and analyze data from any cube (multidimensional data base) created inside BXBwebsite. The cube creation process and configuration is described in the Developer Guide, available to users of Professional Edition through the “Help” button located in the upper right corner of the screen (Figure 1). For Personal and Viewer edition users only the Quick start guides will be shown.



Figure 1 – Help button

This guide will briefly describe the tool features in two parts:

- 1 – For Viewer Edition Users
- 2 – For Personal Edition Users

Note: Once the user is logged in, the license edition will appear beside his/her name at the bottom of the screen.

2 Viewer Edition

In this chapter, we are going to talk about the features available for the Viewer Edition users. Therefore, the user must have access permission to some views previously configured by any user of a Personal or Professional Edition.

When the user enters in BXBanalytics, a view or a window with a list of the previously configured views will be shown (see figure 2). The list may show all available views, only those marked as “favorites” or, yet, the views linked to a certain group (also previously configured by a Personal or Professional Edition user), depending on the choice made by the user in the “Show” combo-box. A view will automatically be opened in the beginning only if a view of the list is marked as “Initial”.

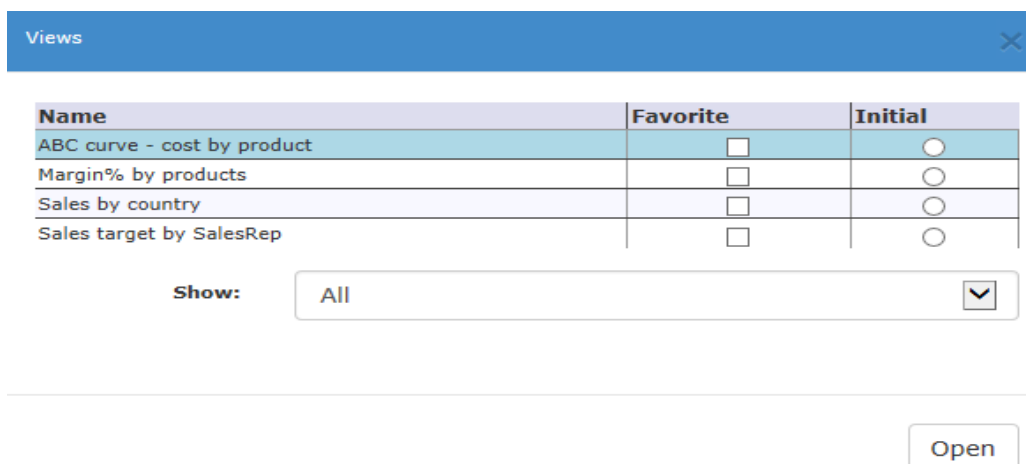


Figure 2 – list of views

Note: The properties “Favorites” and “Initial” (Figure 2) are the only which will be saved for Viewer edition users. All changes made by the Viewer Edition user from the menu options described below can be done, but they are not saved. Only Personal & Professional Edition users are allowed to save these configurations.

2.1 Menu Bar

The menu has the following options available:

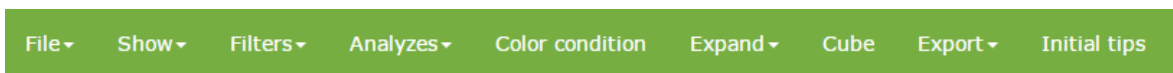


Figure 3 - menu

At the left side of the screen, below the menu bar, the name of the view will appear whenever a view is opened.

2.1.1 File

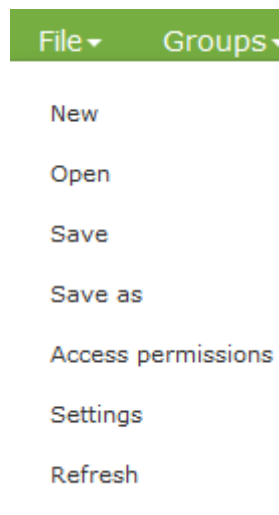


Figure 3A – File menu

It has the following options:

a) Open

This option opens the window illustrated in figure 2 and, besides allowing the user to select the view to be opened, it also makes it possible for the user to:

- define a view as “Initial” (to be automatically opened after logging in)
- choose another way to see the list of the available views: the Favorites or the views related to a group.

b) Save

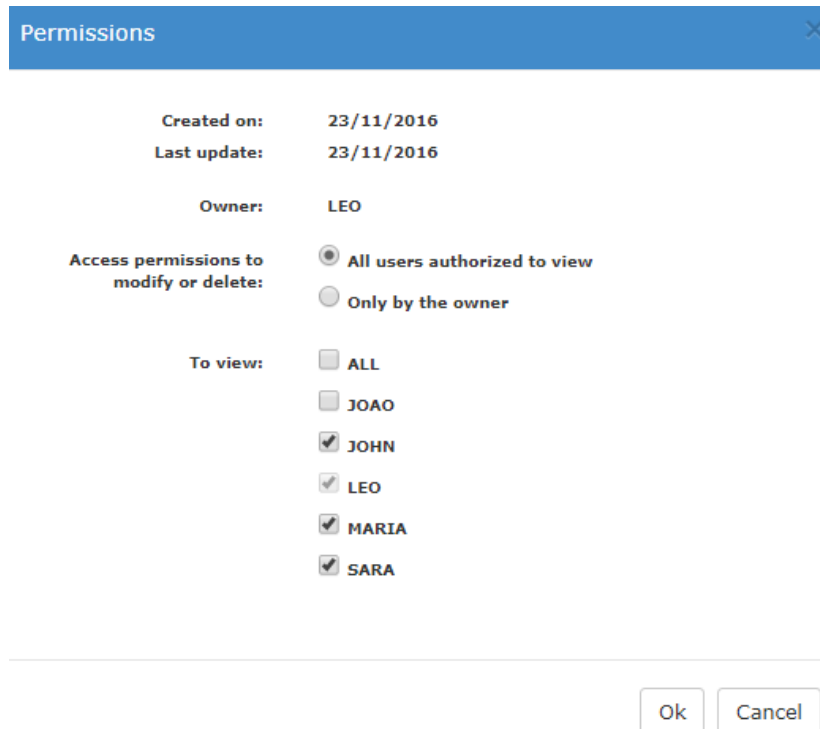
This option saves the selected view.

c) Save as

This option saves the selected view as a new view.

d) Access Permissions

This option shows the users list and allows defining which users will have access to the selected view.



Permissions

Created on: 23/11/2016
Last update: 23/11/2016

Owner: LEO

Access permissions to modify or delete:
 All users authorized to view
 Only by the owner

To view:
 ALL
 JOAO
 JOHN
 LEO
 MARIA
 SARA

Ok Cancel

Figure 45 - Permissions

e) Settings

This option allows to rename the selected view.

f) Refresh

It is used to reload data, in case the cube has been updated (by the *Load schedules* routine, e.g.) while the view was opened.

2.1.2 Show

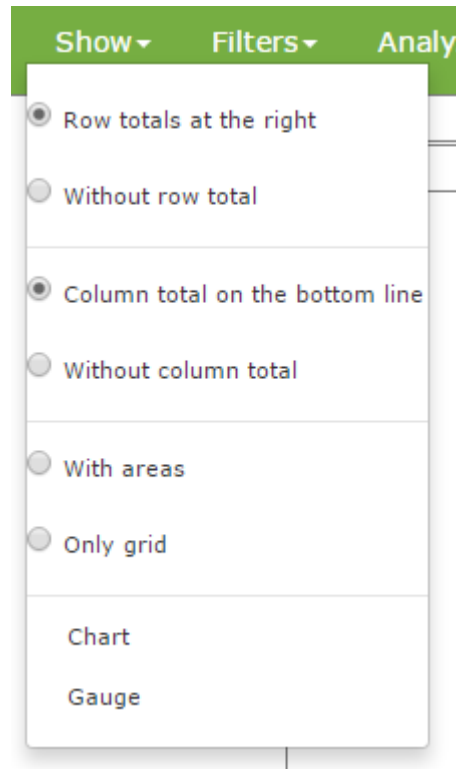


Figure 4 –Show menu

It offers the following options:

- a) Row totals at the right
- b) Without row total
- c) Column total on the bottom line
- d) Without column total
- e) With areas – To show line, column, and measure areas.
- f) Only grid – It uses the entire screen space to show data as grids (spreadsheet) or as ABC curves.
- g) Chart – When clicking this button, a related chart is shown and/or some chart can be selected if available.
- h) Gauge – When clicking this button, a related gauge is shown and/or some chart can be selected if available.

2.1.3 Filters

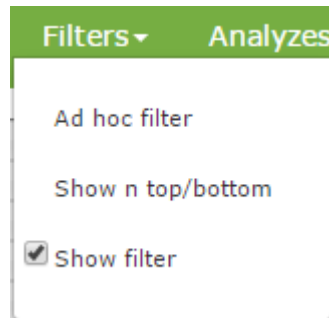


Figure 5 – Filters menu

By checking *Ad hoc filter*, the following window will be shown:

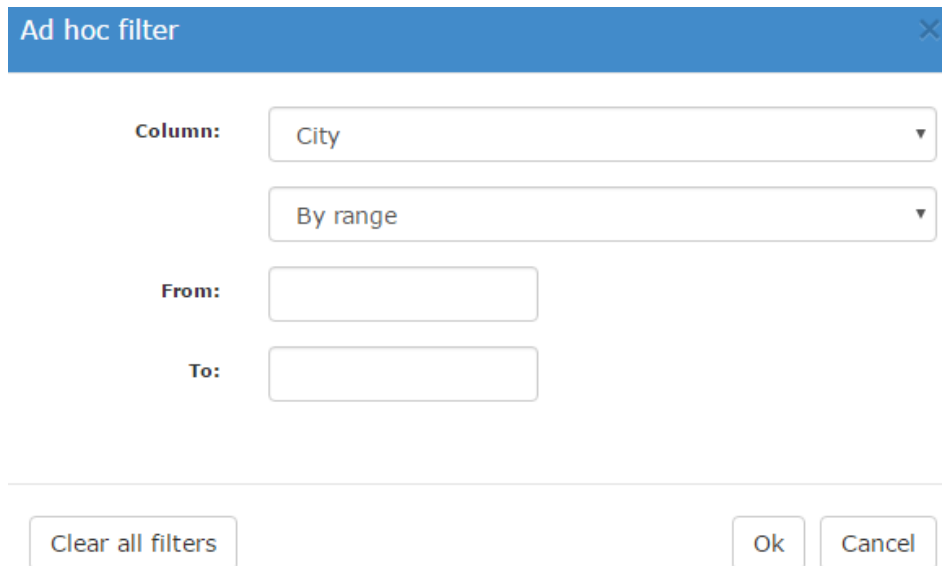


Figure 6 – Ad hoc filter window

In the first combo-box a column of the cube can be chosen to apply a filter on the data of the view. The second combo-box allows using one of the following methods to apply the filter:

- a) By range: the “From” and “To” fields are offered to be filled in. If the “From” field is not filled in, the lower value of the respective column in the cube will be considered. Likewise, if the “To” field is not filled in, the higher value will be considered.
- b) By pattern: it allows filtering data (only alphanumerical columns, in this case) by using the sign % as a “jack” and it can be used in the beginning and/or in the end of the fixed letters and/or numbers combination. Example:
 - by filling in the field opened in this window with %RA, all entries of the respective column whose content ends in RA will be shown; and
 - by filling in the field opened in this window with RA%, all entries of the respective column whose content begins with RA will be shown.

- c) Selection list: it's only applied to columns with less than 100 distinct elements, considering that marking check-boxes with long lists is neither practical nor productive. However, this default number of 100 can be changed by each user, through the field "Max qty of members for filter list (discrete selection)" of the user's configuration window.

By checking the *Show n top/bottom* option, the following screen will appear:

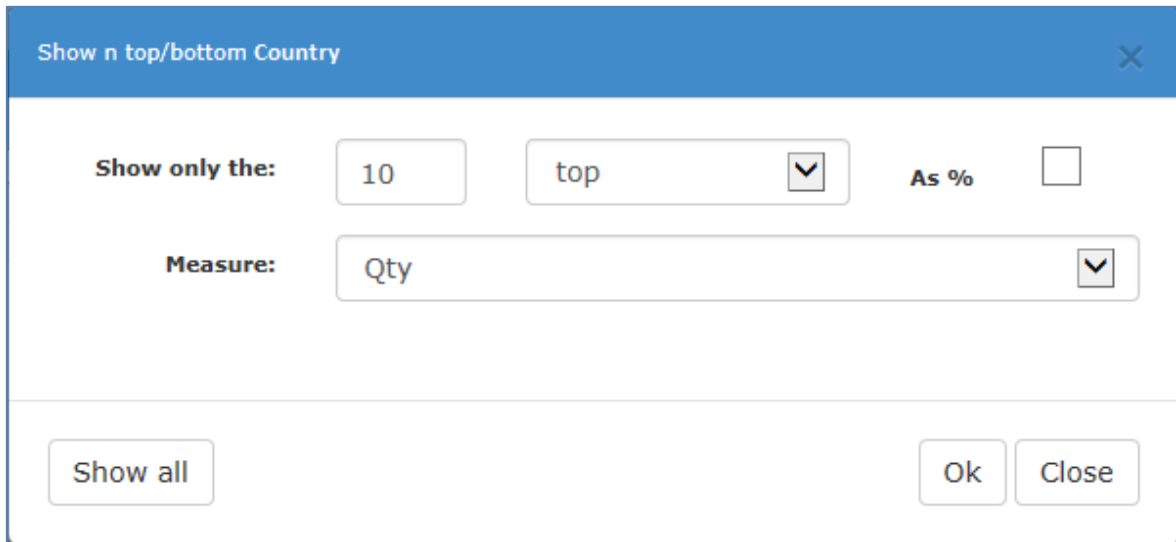



Figure 7 – Show n top/bottom

- a) Show only the: Sets the amount of items to be displayed, with the variation "top" and "bottom";
- b) As %: a checkbox that changes the display to the top/bottom within the percentage set in the first field;
- c) Measure: Defines the measure on which the filter is applied;
- d) Show all: button that resets the filter and display all records again.

In addition, the menu "Filters" also offers a "Show filter" option, which shows a frame with the applied filters, in a summarized way, which can be dragged to another area of the screen or even removed by clicking on "X" in the upper right corner of the frame.



Persist.	Column	Content filtered
<input type="checkbox"/>	<u>Prod categ:</u>	SOFAS, TABLES
<input checked="" type="checkbox"/>	<u>Year:</u>	From: 2014

Figure 8 – Applied filters frame

2.1.4 Analyzes

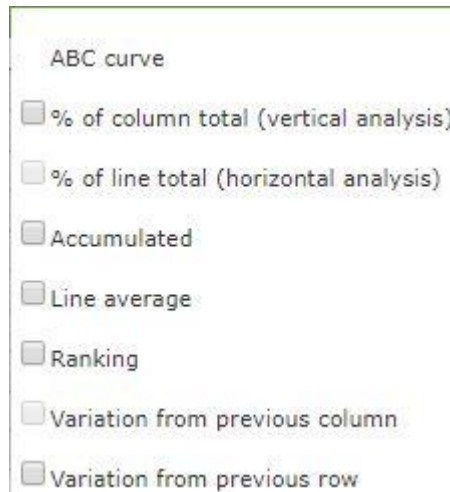


Figure 9 – Analyzes menu

Depending on how the grid of the opened view is exhibited, some of the options above may not be available for checking. The options are:

- a) ABC Curve (detailed in the topic 2.2)
- b) % on the column total (vertical analysis)
- c) % of line total (horizontal analysis)
- d) Accumulate, which shows at the end of each row, the total of the row plus the accumulated of this column in the previous line
- e) Line average, which only makes sense if there is some dimension in the Column area
- f) Ranking, showing in which position each line is in, considering position 1 for the higher value line.
- g) Previous column variation – available only if there is some dimension in the Column area
- h) Previous row variation

2.1.5 Color Condition



Figure 10 – Color condition

It opens a window with the list of the cube's measure and offers the possibility to select the desired measure(s) for color configuration (of font or of cell background), conditioned to fixed values intervals or comparing the value of one measure with the value of another measure.

2.1.6 Expand

It corresponds to a drill down (data detailing/deepening) operation of all lines at once and it can be carried out to the last detail level defined in the row area.

Clicking on the option “Configure” under the menu “Expand”, a window is opened and there the user can choose until which level the data has to be detailed/deepened.



Figure 11 - Expand

2.1.7 Cube

It opens a window with information about the last updated date and time and the number of entries (lines) that the cube contains.

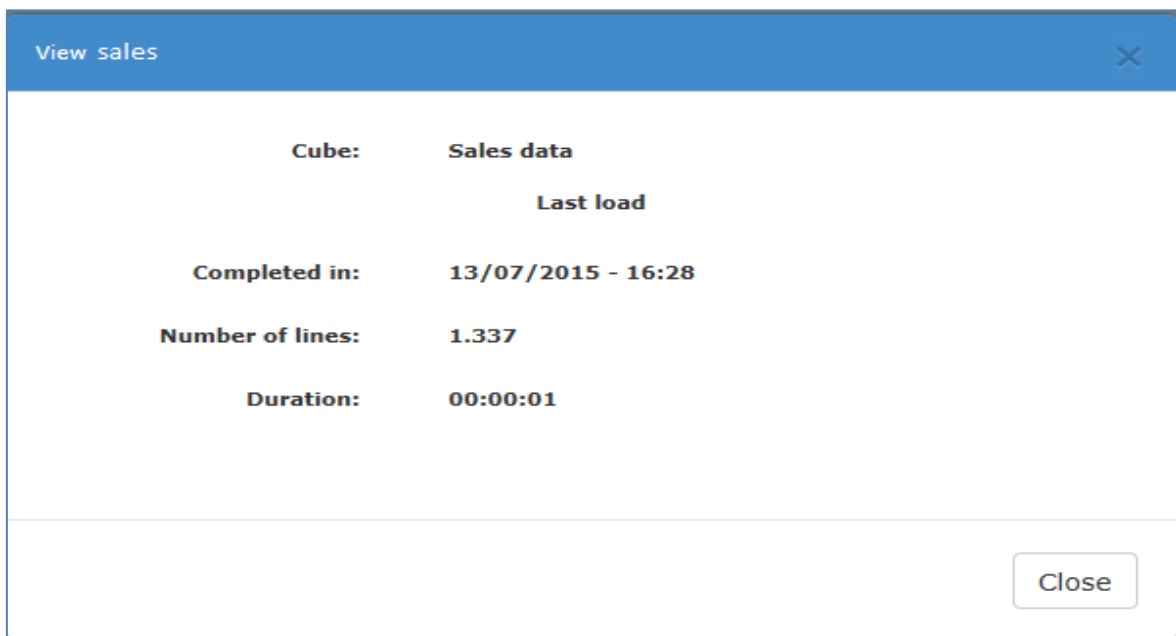


Figure 12 – Cube data

2.1.8 Export

It follows the browser patterns to export the filtered data in a .CSV file or the view's content in a PNG formatted file.

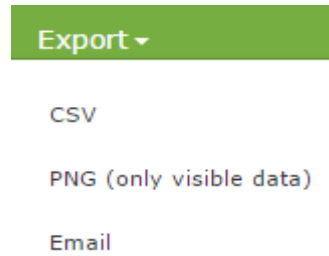


Figure 13 – Export menu

2.2 ABC Curve

×
ABC Curve Settings

% Class A:

% Class B:

Class A:

Class B:

Class C:

Display mode: Report Area chart Line chart

Figure 14 – ABC Curve settings

It offers the following options by clicking on the “Settings” button:

- Limit % that defines the accumulated to Class A and Class B
- The colors that must be used to highlight the lines belonging to each class.
- Display Mode: If the ABC curve must be shown in report, area or line chart format.
- If the measure to be shown in the chart has to be the value, accumulated value or percentage.

2.3 Pivoting Areas

The screen's main area is divided as follows:

- a) Row area (to the left) and column area (on top), to where the dimensions are moved; the column area bears one dimension only.
- b) Measure area, which contains the measures used in the view and, there being more than one, the user may modify the measures exhibition order by simply dragging them.
- c) Main area, which shows the measures values grouped by the first dimension contained in the row area. In it, the menu functionalities and the drill down - consisting of the expansion of any of the grid lines whose data will be detailed/expanded in the sequence configured in the row area - can be applied. This area is also used to show ABC Curve formatted data. In this case, however, without the drill down option.

3 Personal Edition

The Personal Edition user, beyond the capabilities offered to the Viewer Edition user, can additionally:

- a) Create new views (Menu "File" / "New") and, for such, use the Measures & Dimensions panel, shown in the left side of the screen
- b) Rename a view (menu "File" / "Rename")
- c) Change and re-save (menu "File" / "Save") existing views or also save them with another name (menu "File" / Save as")
- d) Create view groups and link views to groups (menu "Groups")
- e) Define if the view has to be saved with all panels or just the area that contains the data (menu "Show")
- f) Attribute access permission for other users (menu "Permissions").

A new view configuration is very simple:

1st step: Click on menu, "File" and then on "New".

2nd step: In the opened window, inform the name to be attributed to the view and select the respective cube in the combo-box.

3rd step: Drag some measure(s) from the left Measures panel to the main area. In case a measure is dragged by mistake, just drag it back (from the measure area to the measures panel to the left).

4th step: Drag the desired dimension(s) from the left panel to the row area, in the sequence where you wish to carry out the drill down.

To change the dimensions sequence to the drill down, just click on the dimension name and drag it up or down, within the row area. In case you don't want one or more selected dimensions to be part of the drill down sequence, the respective dimension can be dragged back (from the row area to the dimensions panel to the left).

5th step: Any dimension (but only one at a time) can also be dragged into the Column Area. If the dragged dimension contains more than 12 elements, an alert message is displayed, because it is assumed that many columns generate horizontal scrolling and this makes it difficult to get a quick understanding of the information

6th step: Should it be the case, add color condition.

7th step: Save the view, by clicking on the option "Save" of the menu "File".

3.1 Menu Bar

3.1.1 Groups

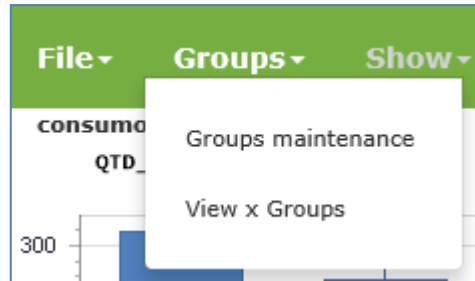


Figure 15 - Groups menu

It allows creating view groups and set the respective link (of views and their respective groups). This menu item offers two options:

- a) Group Maintenance: where new groups can be created and the existing groups can be excluded or edited. Edition opens another window that shows the list of available views, with a check-box for linking the desired view to the respective group.
- b) View x Group: It opens a window with the list of groups created and allows marking the check-box corresponding to the group(s) to which the view has to be linked. This window is optional, considering that the group maintenance option also offers the possibility to configure this link.

3.1.2 Show

It offers the user the possibility to visualize only the data area (grid), this area together with the row area and the column area, or yet, everything, including the Measures Panel and the Dimensions of the left.

3.1.3 Filters

In addition to the options available to users of Viewer edition, the tool offers the possibility to configure persistent filter and initial filter.

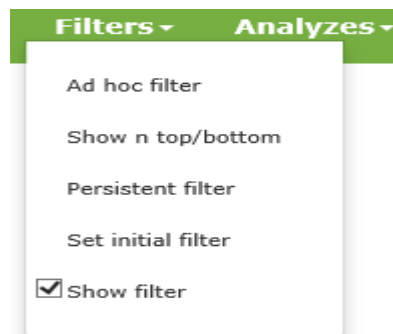


Figure 4 – Filter options list

3.1.4 Persistent Filter

Besides the options described for Viewer Edition user, the Personal Edition user can also configure a Persistent filter, which will be saved with the respective view.

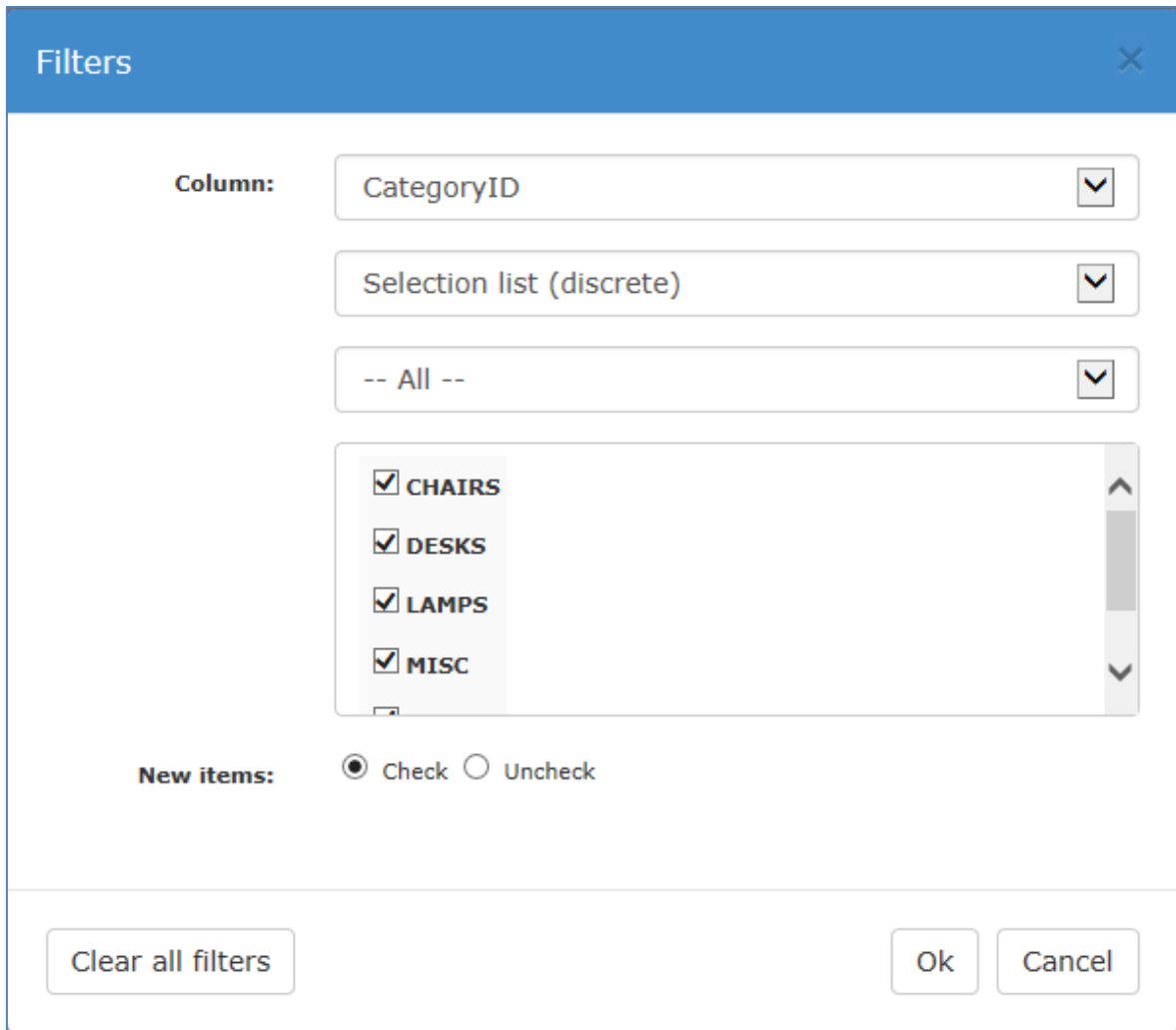


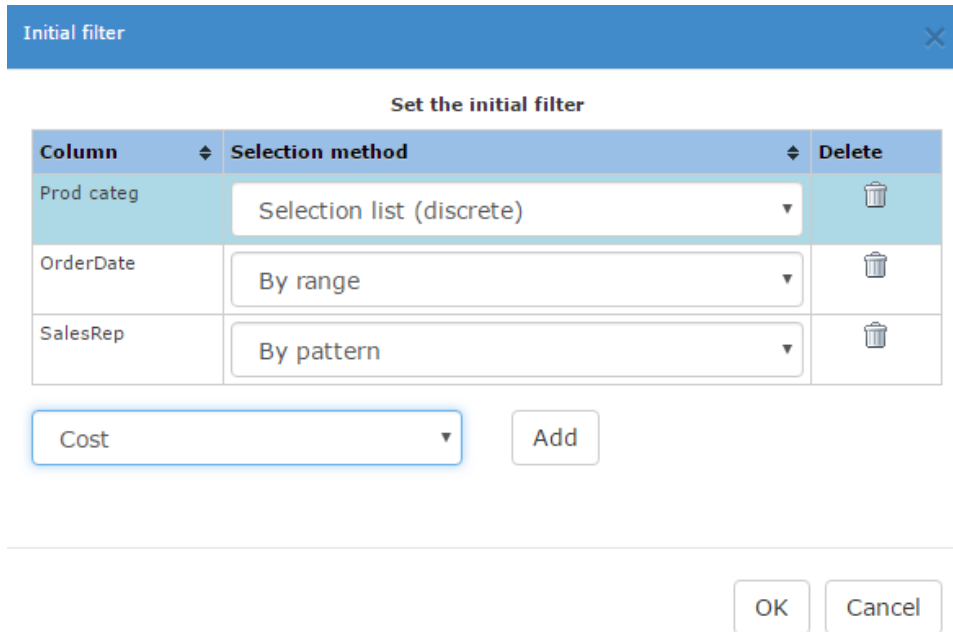
Figure 5 – Filtering rows

When using the **Selection list** as filter method, the *behavior* for new elements can also be defined through the “New items” radio buttons:

- Check: means that new elements inserted in the cube will be automatically checked in the list
- Uncheck: new elements inserted in the cube will remain unchecked in the list.

3.1.5 Set initial filter

This option allows to configure a filter (Figure 19) to be applied by opening the view (before loading the cube data), where the user can use the filter window illustrated in Figure 20.

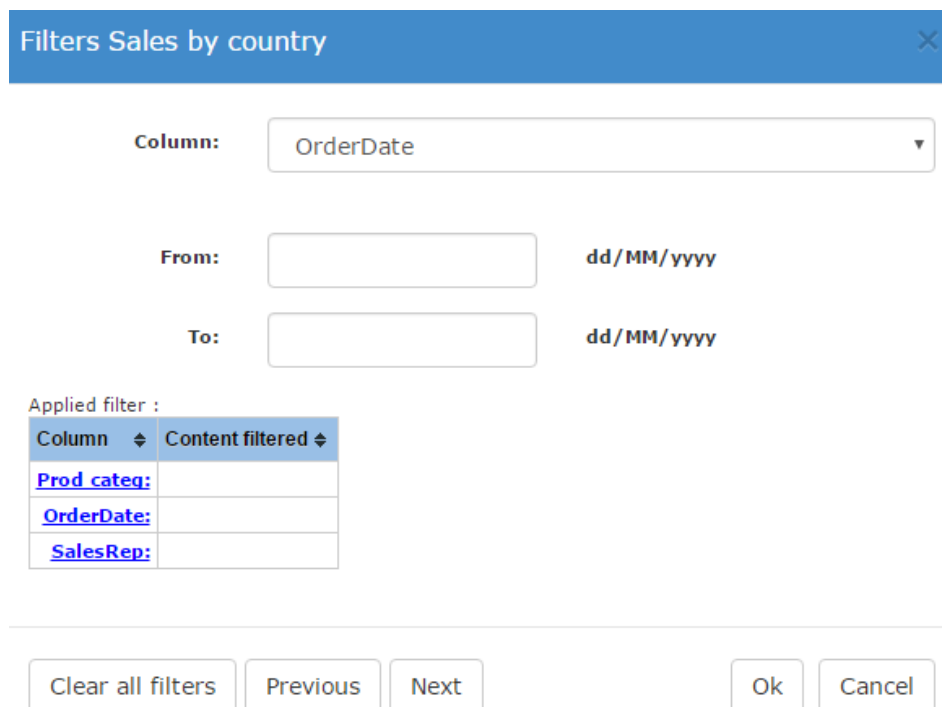


The 'Initial filter' window has a title bar with a close button. The main area is titled 'Set the initial filter' and contains a table with the following data:

Column	Selection method	Delete
Prod categ	Selection list (discrete)	
OrderDate	By range	
SalesRep	By pattern	

Below the table is a dropdown menu with 'Cost' selected and an 'Add' button. At the bottom right are 'OK' and 'Cancel' buttons.

Figure 18 – Initial filter set up window



The 'Filters Sales by country' window has a title bar with a close button. It contains the following fields:

- Column: OrderDate
- From: dd/MM/yyyy
- To: dd/MM/yyyy

Below these fields is a section titled 'Applied filter :'

Column	Content filtered
<u>Prod categ:</u>	
<u>OrderDate:</u>	
<u>SalesRep:</u>	

At the bottom are buttons for 'Clear all filters', 'Previous', 'Next', 'Ok', and 'Cancel'.

Figure 19 – Initial filter window for the end user

3.1.6 Chart and Gauge

If some chart or gauge has been related before, the same object will be shown when the user clicks on this menu option. However, on the first time the user clicks on this menu option, a *New* option will be offered in the combo box illustrated in figure 21. If there are some objects available (which uses the same cube) for the user, these objects will also be listed under the check box.

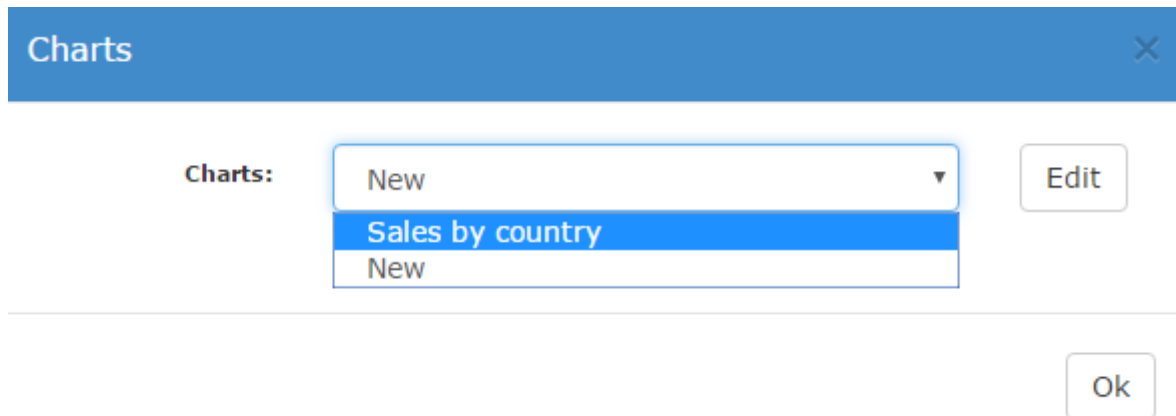


Figure 20 – Chart selection

Note: The **New** option calls BXBdashboard and will work only if the user has access to this module.