



Deutsches Anwenderhandbuch

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## **Cube Viewer**

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# 1. Preface

SW-Tools Cube Viewer provide you with a simple to use user interface to analyse data stored in a cube.

It is integrated in the **SW-Tools IQ** environment because of the following advantages:

- **IQ is optimal for online queries**
- **IQ runs in the NET-TRIO environment for intra/internet solutions**
- **IQ provides the link back to the real database information for complete drill-down capabilities**

## **1.1. Requirements**

The Cube Viewer requires SW-Tools TRIO version 008.036 or higher. It also requires a separate license.

## 1.2. Video

This manual is based on the BI demosystem and all screenshots is automatically generated in connection with the video. The video is present at the SW-Tools webpage

**<http://www.swtools.com>**

The video is intended to be an assistant for presentations and on-line training sessions.

## 2. The user interface

The cube viewer consist of two areas

- **A controlpanel**
- **A view area**

## 2.1. The controlpanel

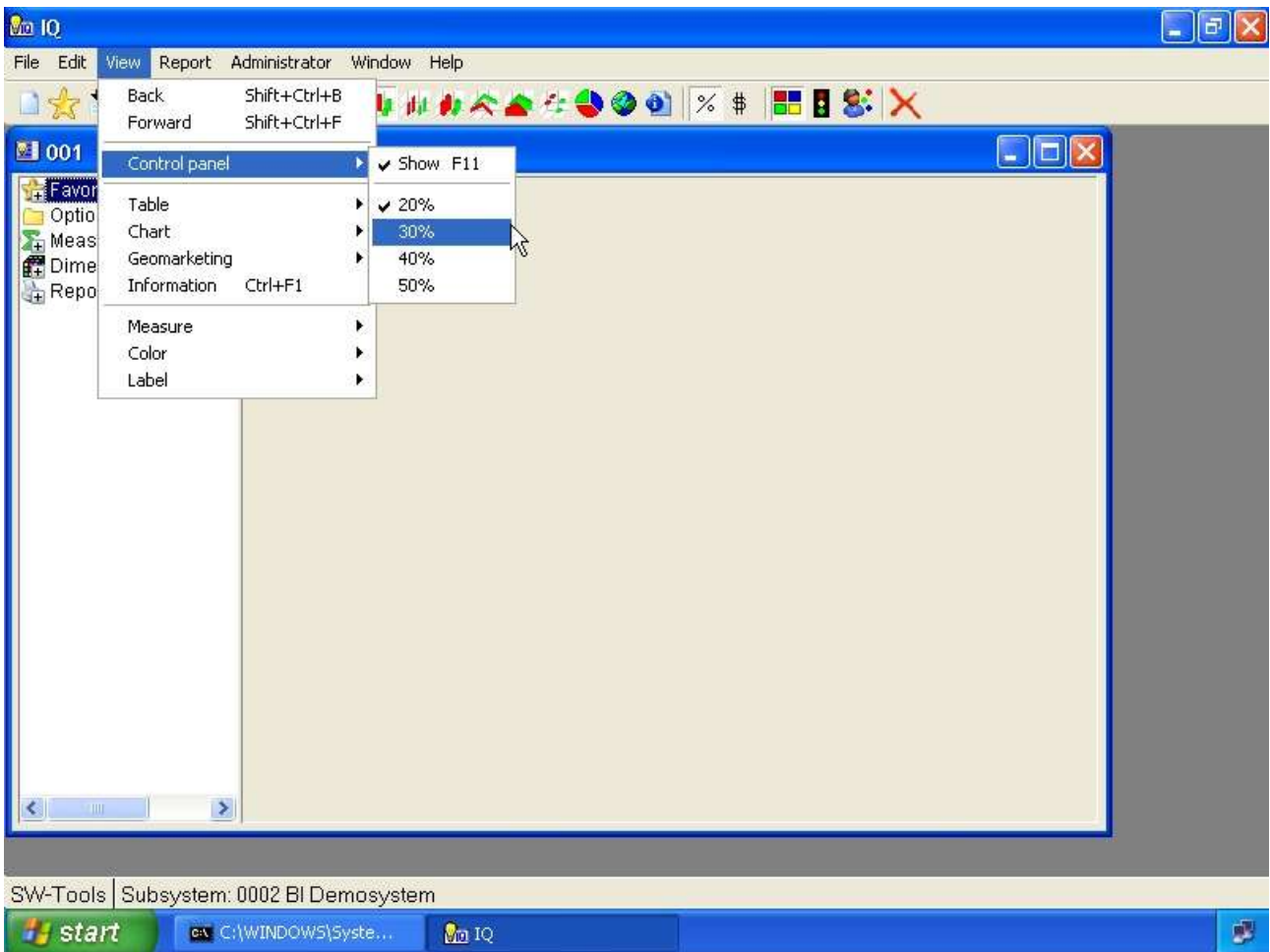
The controlpanel is a tree view like the windows explorer, where you as user are able to define analytic views of the data stored in the cube. The definition of a view is done by selecting one of the measures and one or more of the dimensions.

The controlpanel may be shown or hidden by selecting the **Show** function on the toolbar or press **F11**.



### 1. The show/hide controlpanel toolbar item

The controlpanel normally use 20% of the entire width of the window, but you may set this to 20, 30, 40 or 50% using the menu

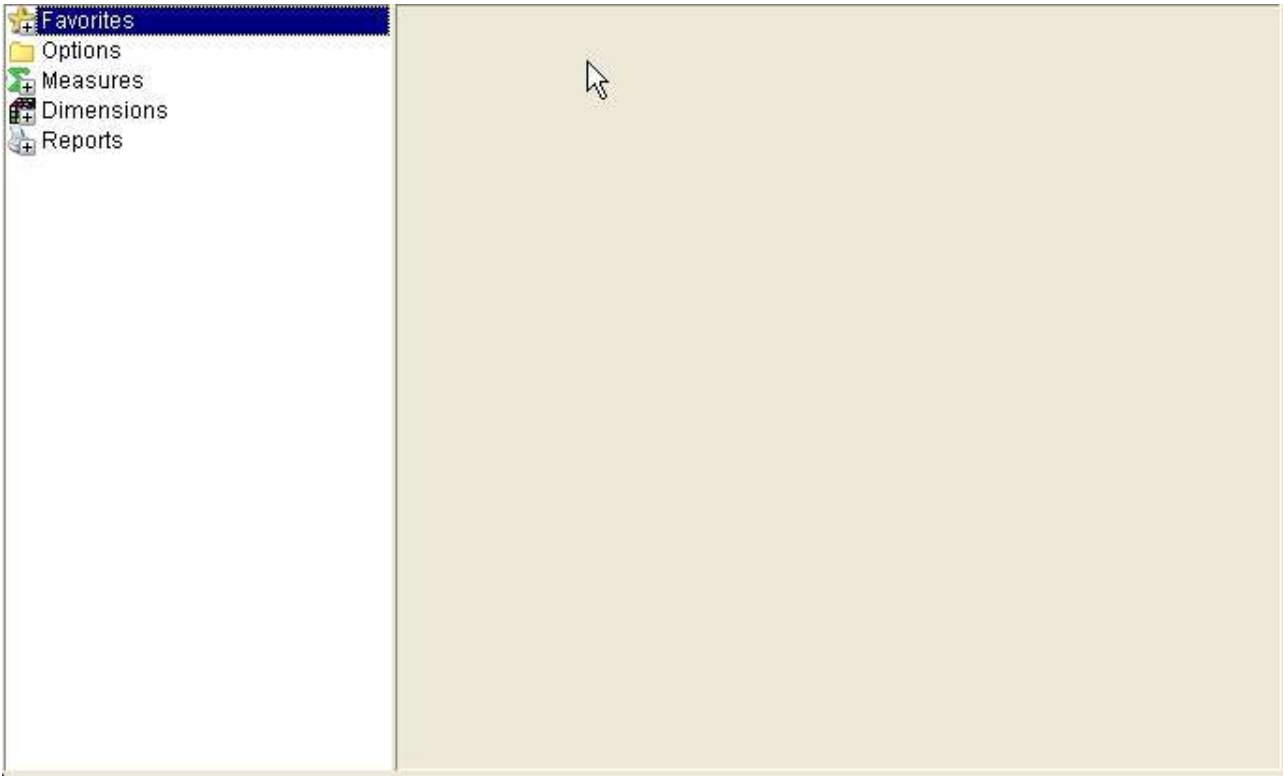


### 2. Menu for controlpanel size



## 2.1.1. Controlpanel items

The controlpanel contain the following items:



### ***3. The controlpanel items***

Any item within the controlpanel may be selected using the keyboard, that is if the controlpanel have focus. You may use the arrow keys up/down to position yourself in the panel and the **Enter** key to select or deselect an item.

If you prefer to use the mouse you may single-click on the symbol left of the item name or double-click on the name to select or deselect the item.

Some of the items, normally those who have a + symbol in it are items that contain subitems. Therefore when you select such an item the item will be opened and the + symbol will change to a - and display all subitems underneath it. If the symbol does not change, it is because there are no subitems present for the selected item.

### **2.1.1.1. Favorites**

This item may be opened/closed and contain subitems of every saved view. Please refer to the chapter **Favorites** later in this manual.

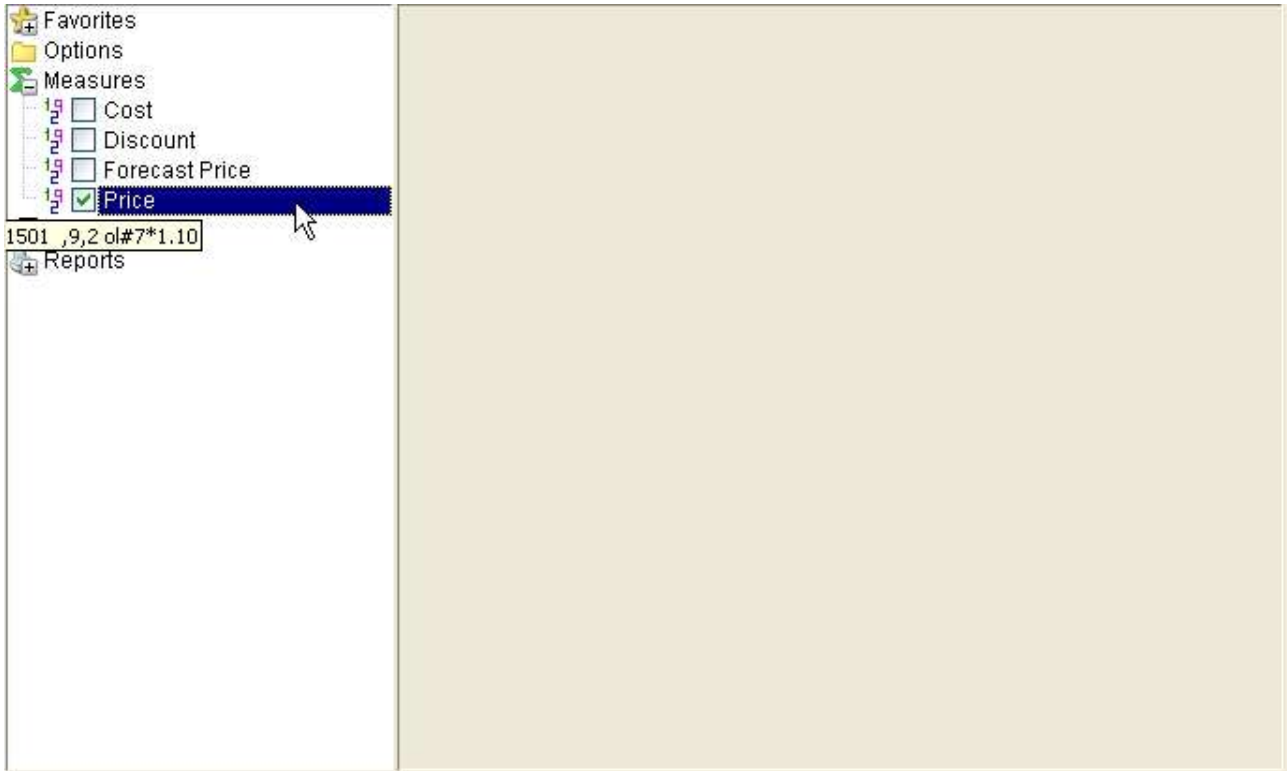
## 2.1.1.2. Options

This item may be opened/closed and contain entries for you to control how any axis on a chart should be. For example, you may control how it should be sorted and how many items should be displayed.

Please refer to the chapter **Sorting and view settings** later in this manual.

### 2.1.1.3. Measures

This item may be opened/closed and contain all available measures in the cube. Normally you should only select one measure at a time. The manual will however describe how you may work with multiple measure later on.



**4. Selecting a measure**

## **2.1.1.4. Dimensions**

This item may be opened/closed and contain all available dimensions in the cube.

A dimension may be selected into one of 4 axis.

There is two ways you can select a dimension into an axis. By opening the dimension item and checkmark the axis or by right click on the dimension item and select the axis via a menu.

### 2.1.1.4.1. Dimension axis

The measure selected will always be show vertically on a chart. Therefore the dimension can only be used on X, X1, Y or Z.

The X axis is the main horizontal axis. It is divided into marks, where each mark displays the dimension value.

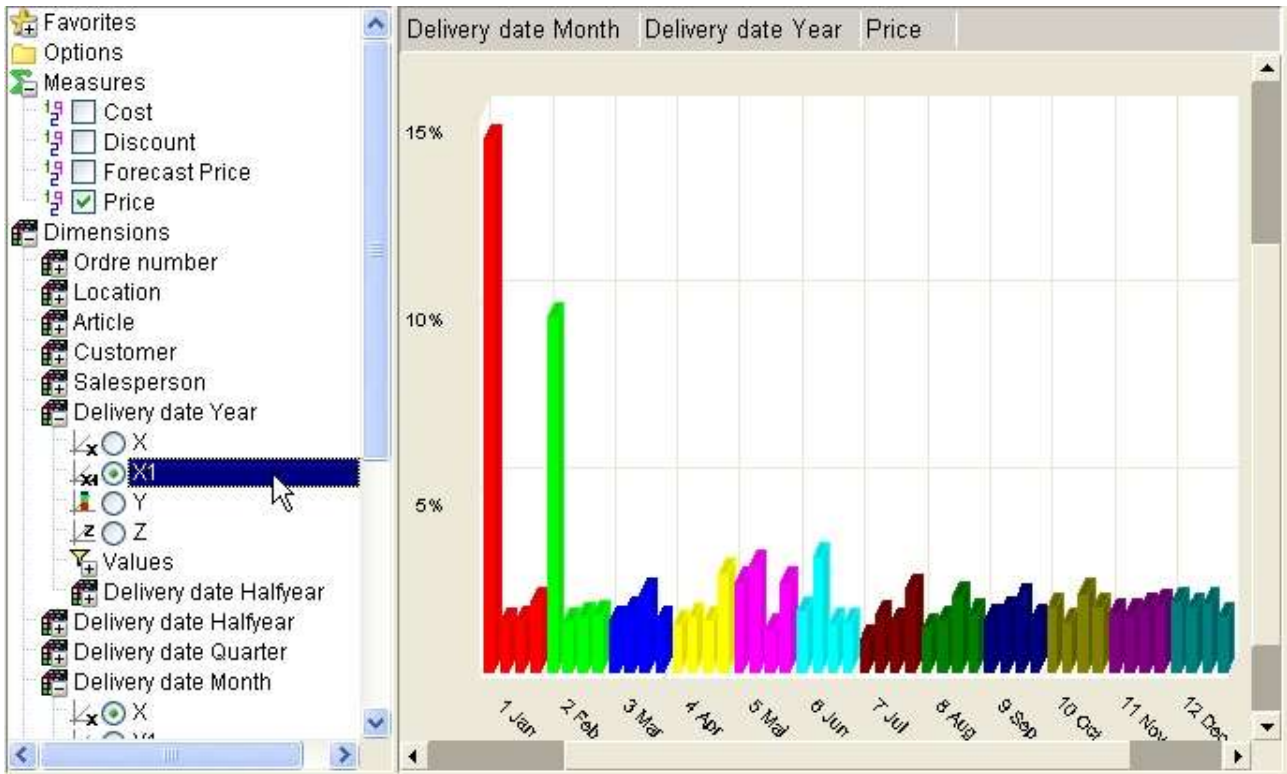
The X1 axis os the secondary horizontal axis, or a subaxis on the X axis. This axis will not display any marker and dimension value.

The Y axis may be used to stack values vertically. Please be aware that the sums retrieved from the cube is summed up according to this selection, so that each dimension selected on the X, X1 or Z axis is grouped by the dimension selected in the Y axis.

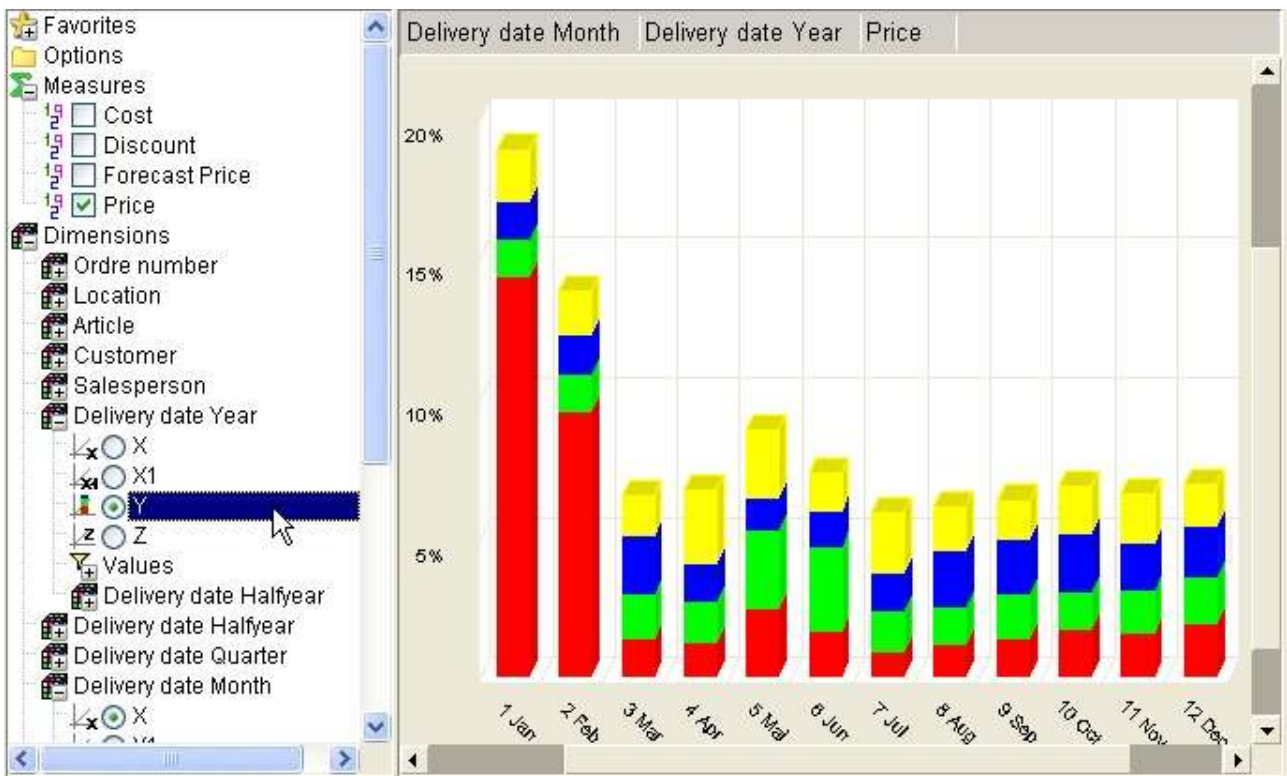
A dimension can only be selected on one if the mentioned axis.



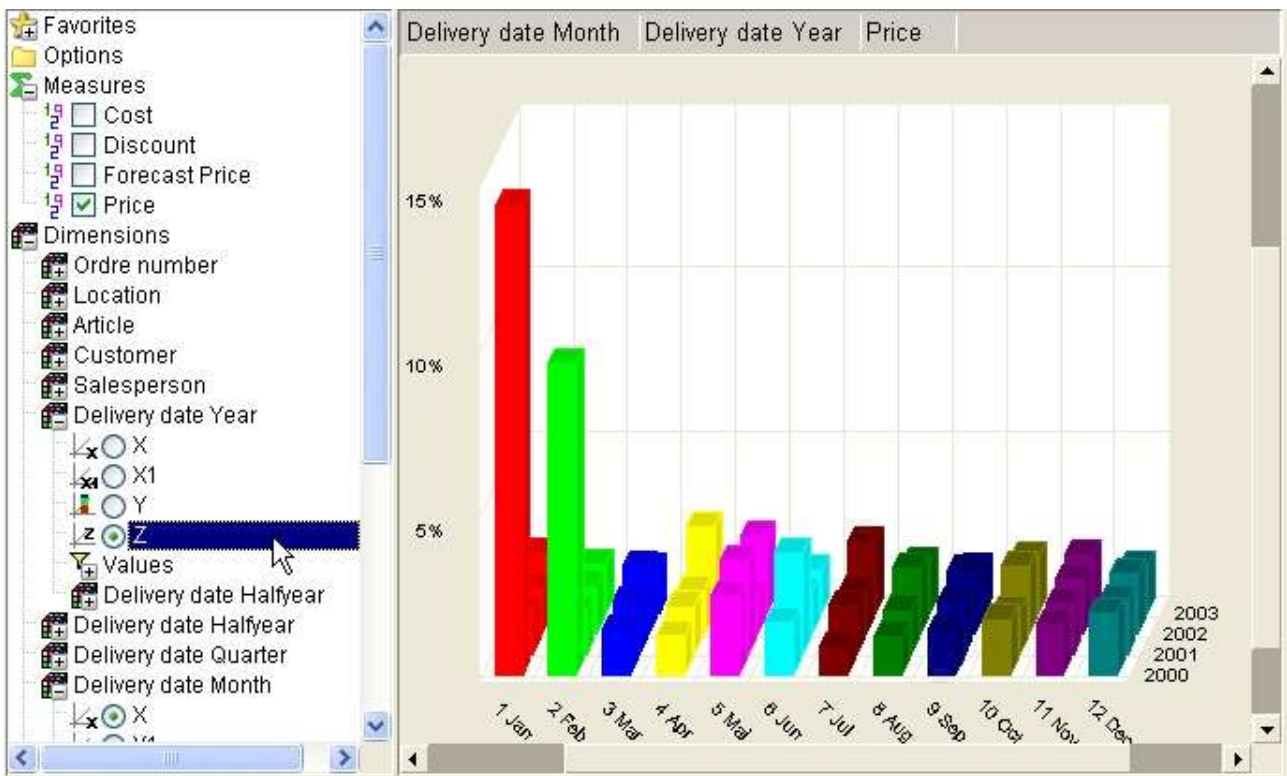
**5. Dimension axis X**



**6. Dimension axis X1**



**7. Dimension axis Y**



**8. Dimension axis Z**



## 2.1.1.4.2. Dimension values

The subitem dimension values contain a listing of all collected values within the cube. Also, it always contain a first item named **All**.

This section is used to make selections for a dimension, e.g. selecting to view data from a specific year or country.

Selections on dimension values may be done even if the dimension is not selected into an axis on the view.

Please refer to the chapter **Selections** later in this manual.

### **2.1.1.5. Reports**

This item can be opened/closed and contain subitems of every saved report. Please refer to the chapter **Reports** later in this manual.

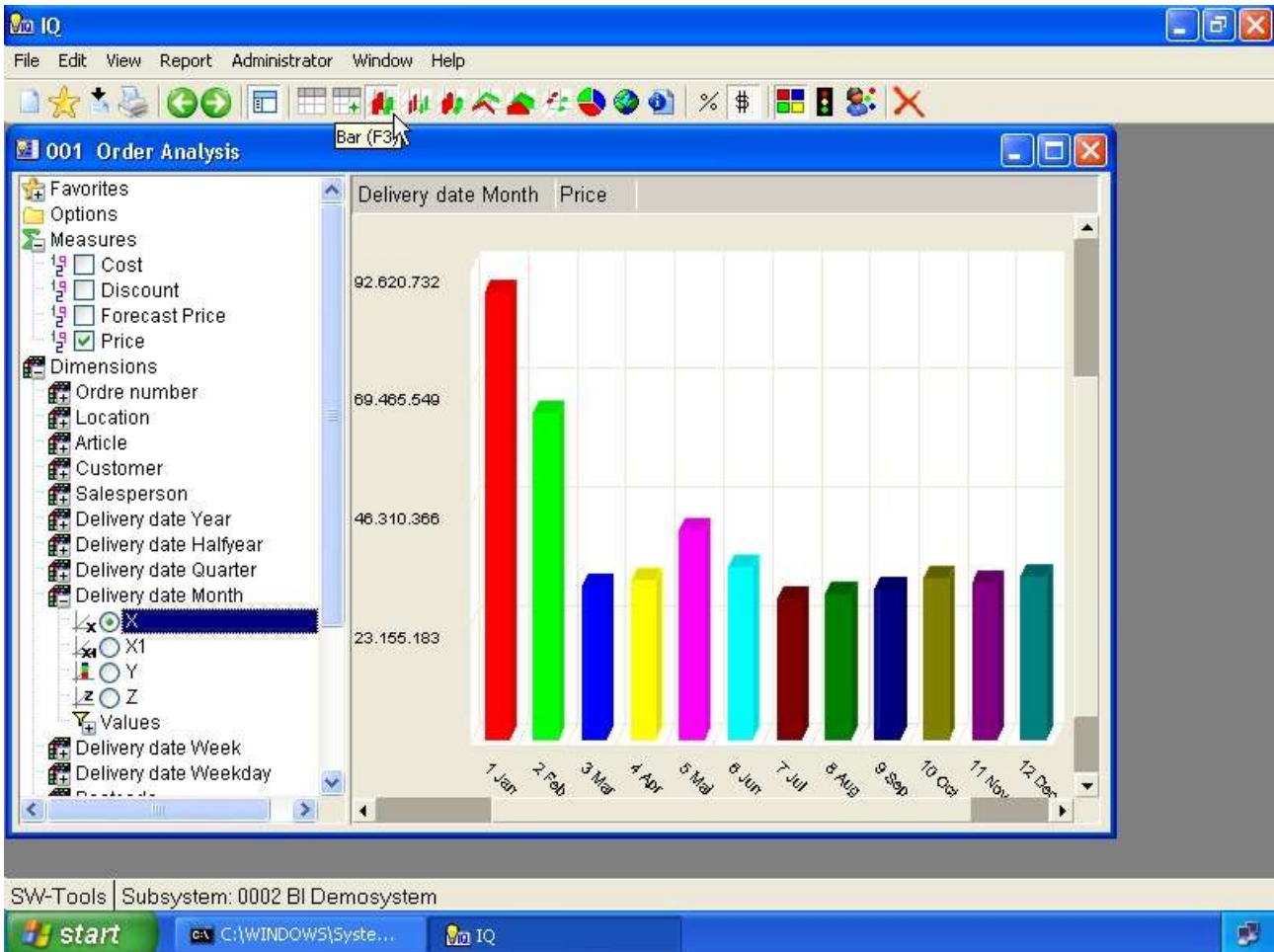
## **2.2. The view area**

The view area is used to display the information selected. The view is initially not containing anything until you select at least a dimension.

The width of the view is always dependent on the size of the controlpanel as described in the previous section.

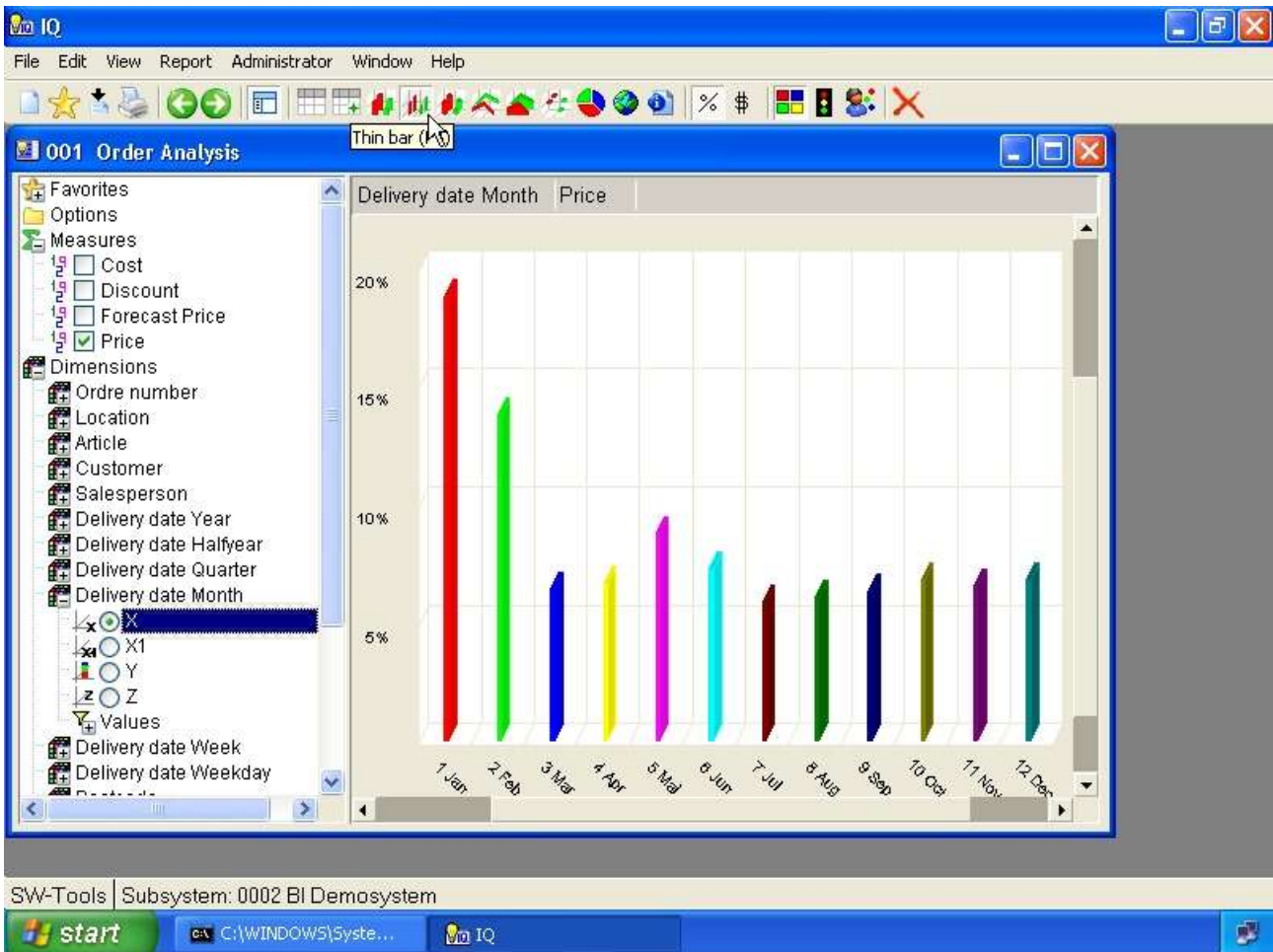
### 3. Chart view

The default view of any analysis is a bar chart, but the view can any of the charts shown below. You select the chart type as shown here from the toolbar or using one of the function keys as listed in the chapter **Keyboard control**.



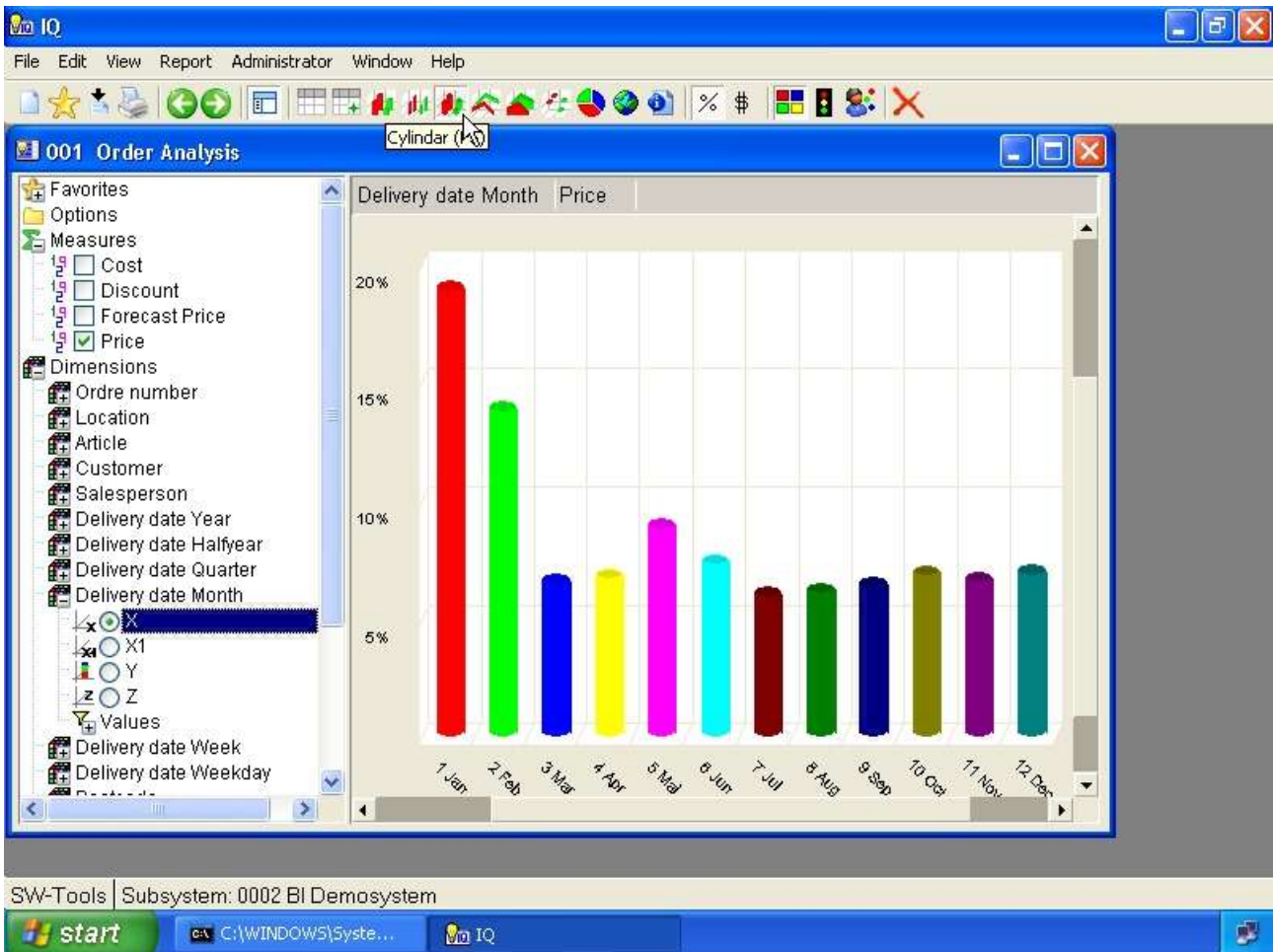
**9. Bar chart**

# Cube Viewer

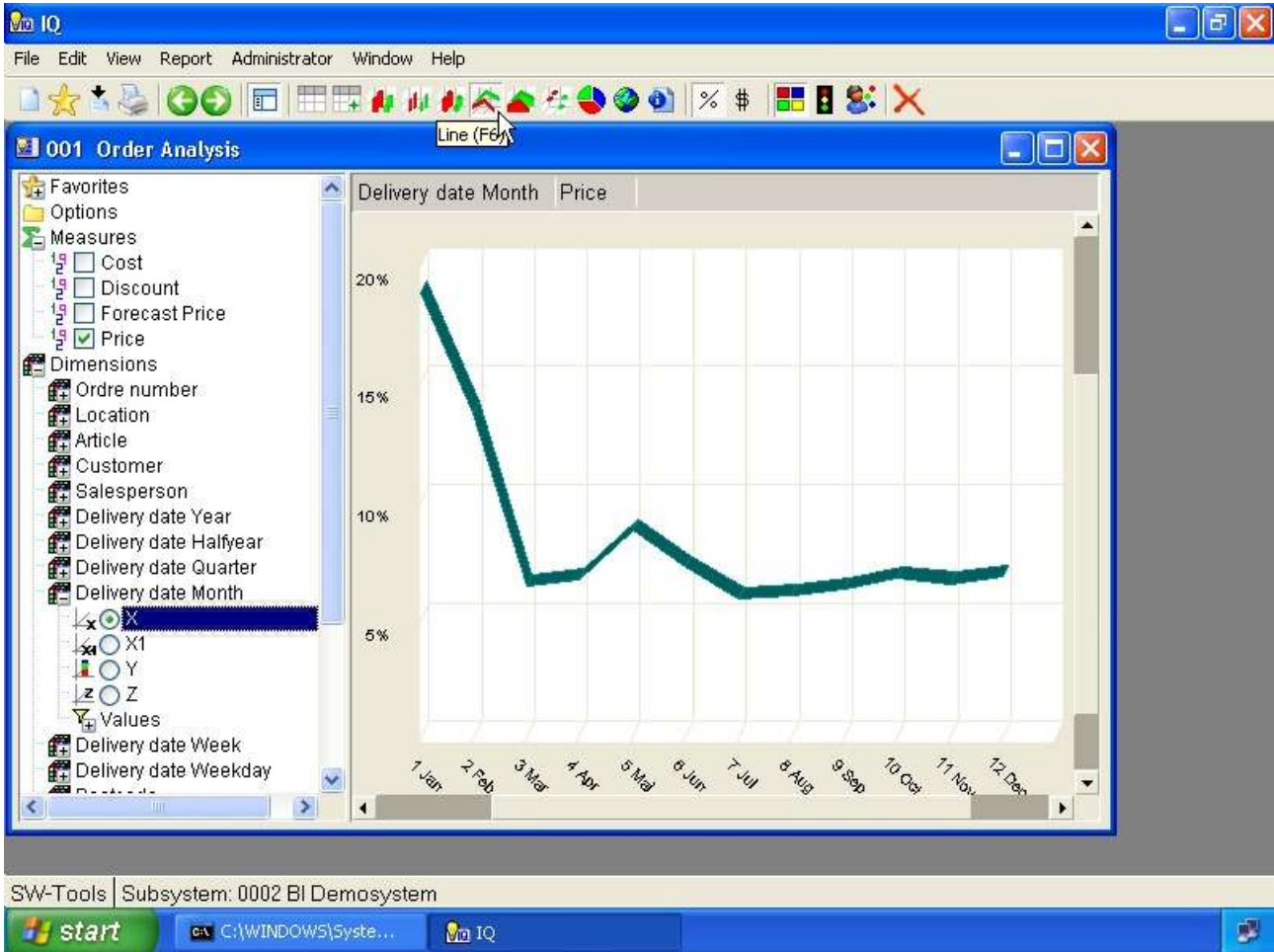


**10. Thin bar chart**

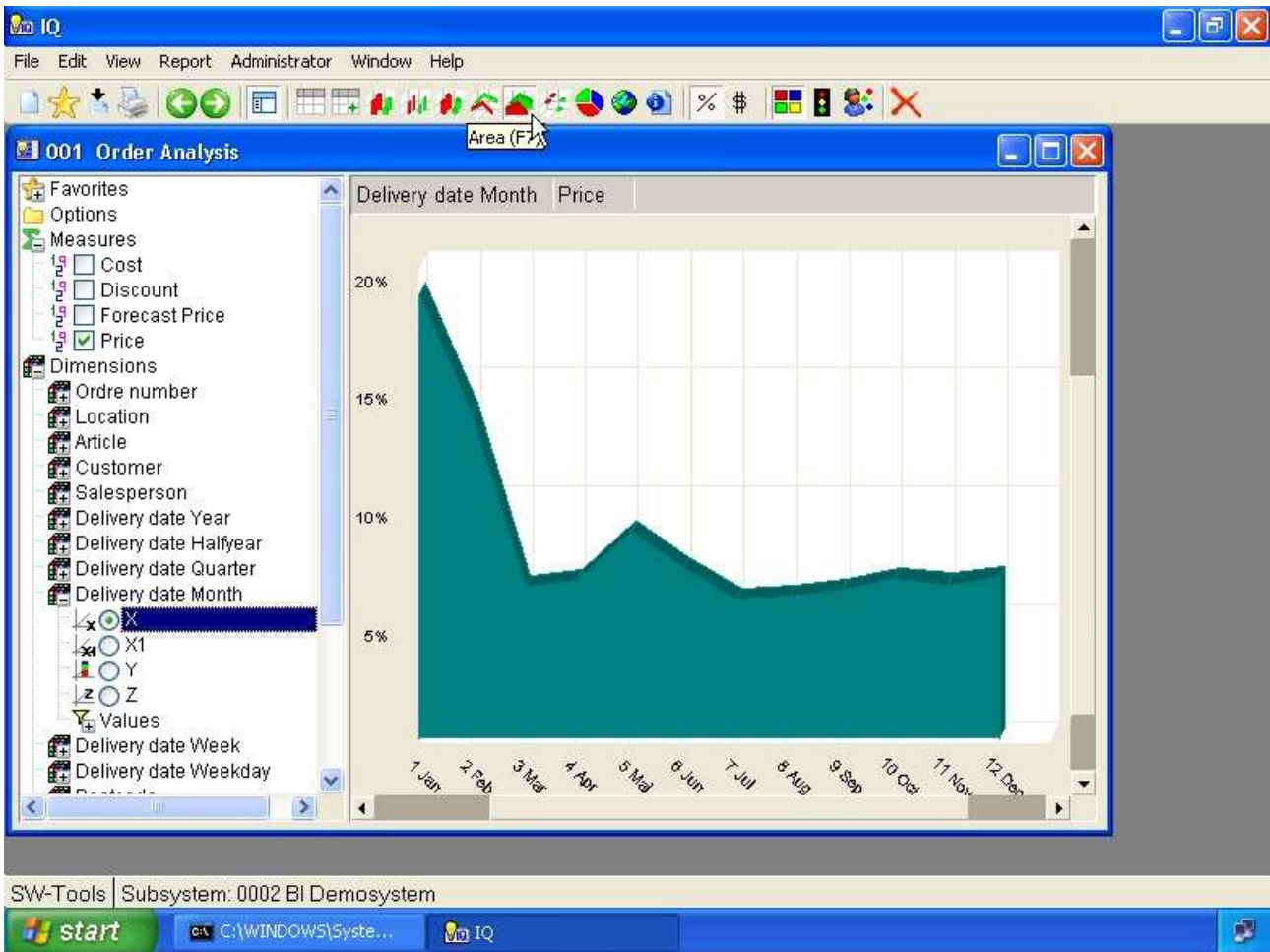
# Cube Viewer



## 11. Cylinder chart



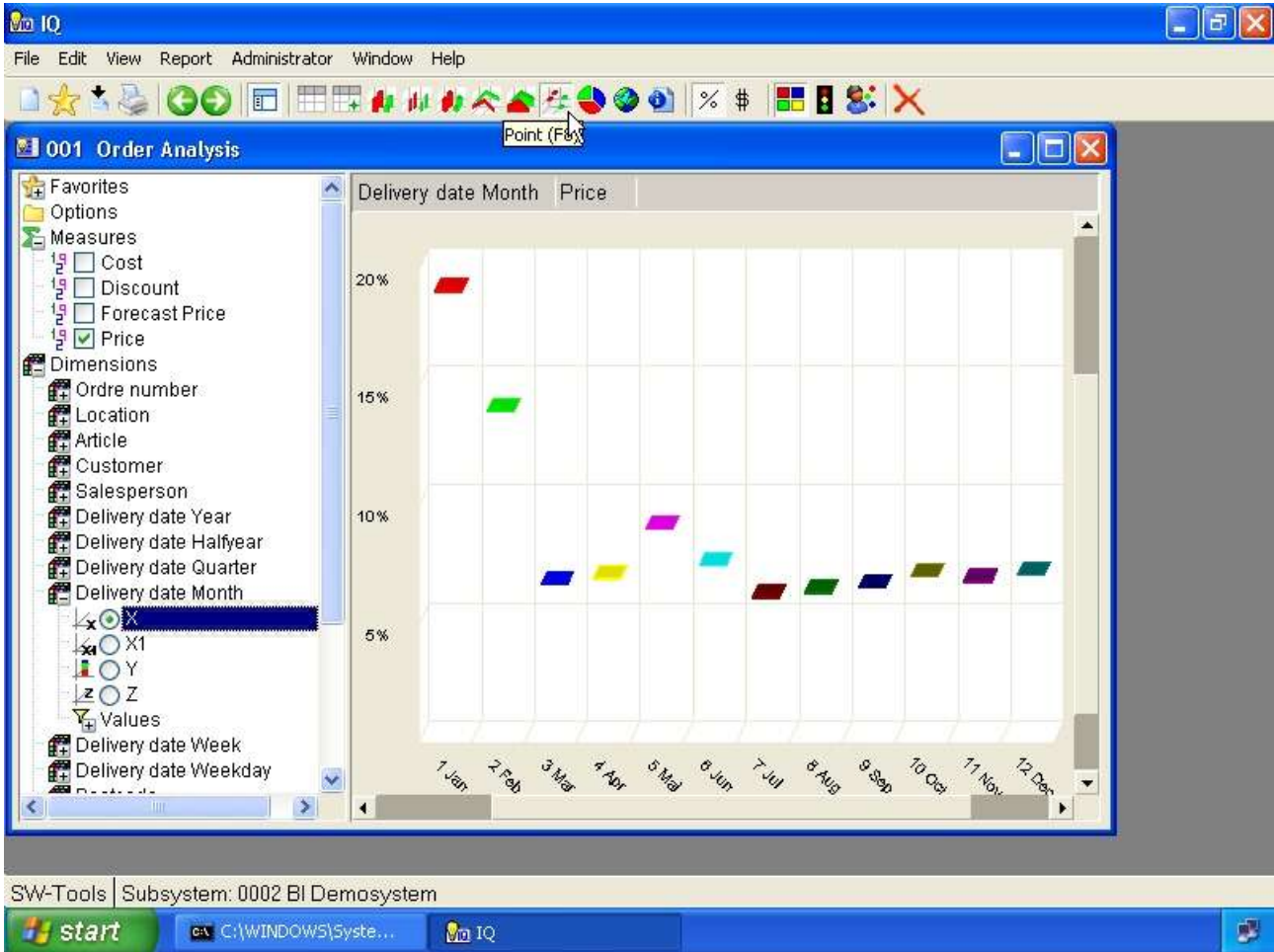
**12. Line chart**



**13. Area chart**

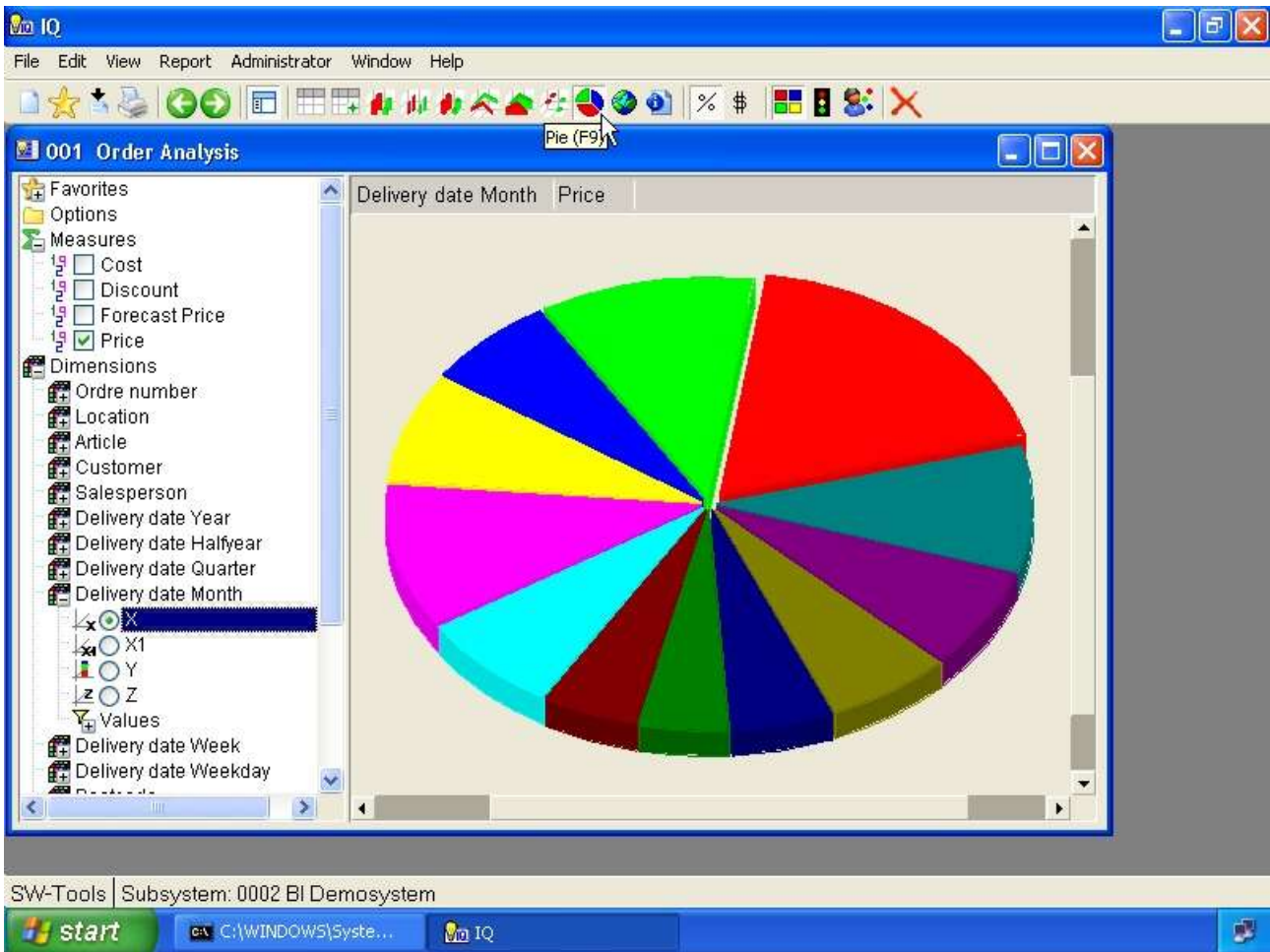


# Cube Viewer



## 14. Point chart

# Cube Viewer



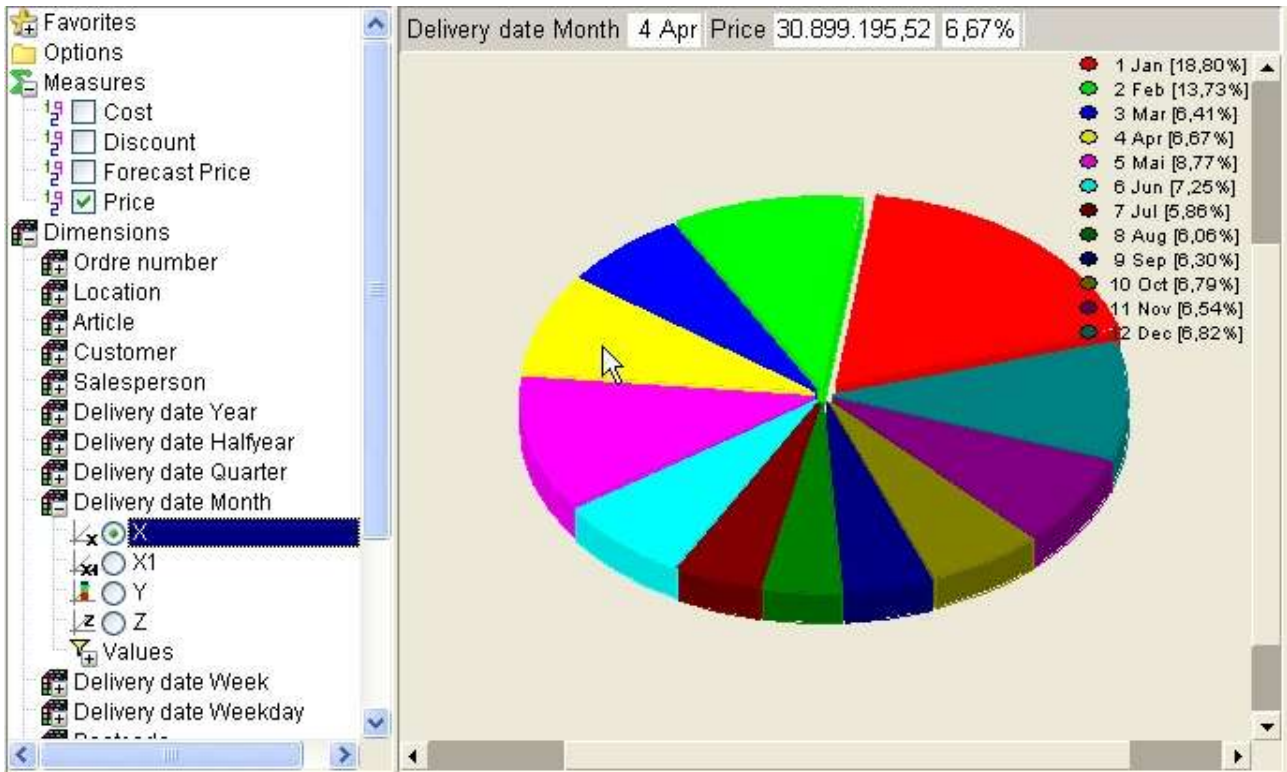
**15. Pie chart**

### **3.1. View angle**

The view angle of a chart may be controlled by the two scrollbars located in the view area.

### 3.2. Legend

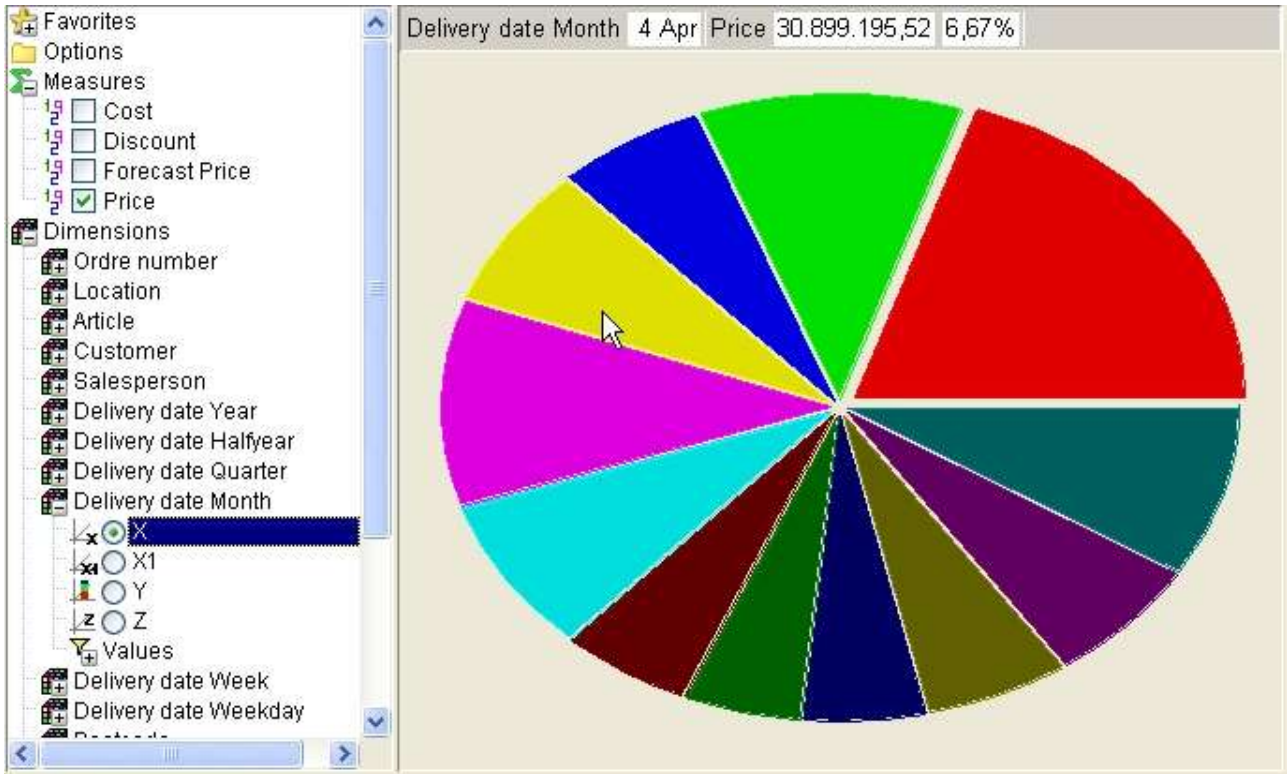
The legend of a chart may be shown/hidden using the menu  
- **View, Chart, Legend**



**16. Display of legend**

### 3.3. 2D instead of 3D

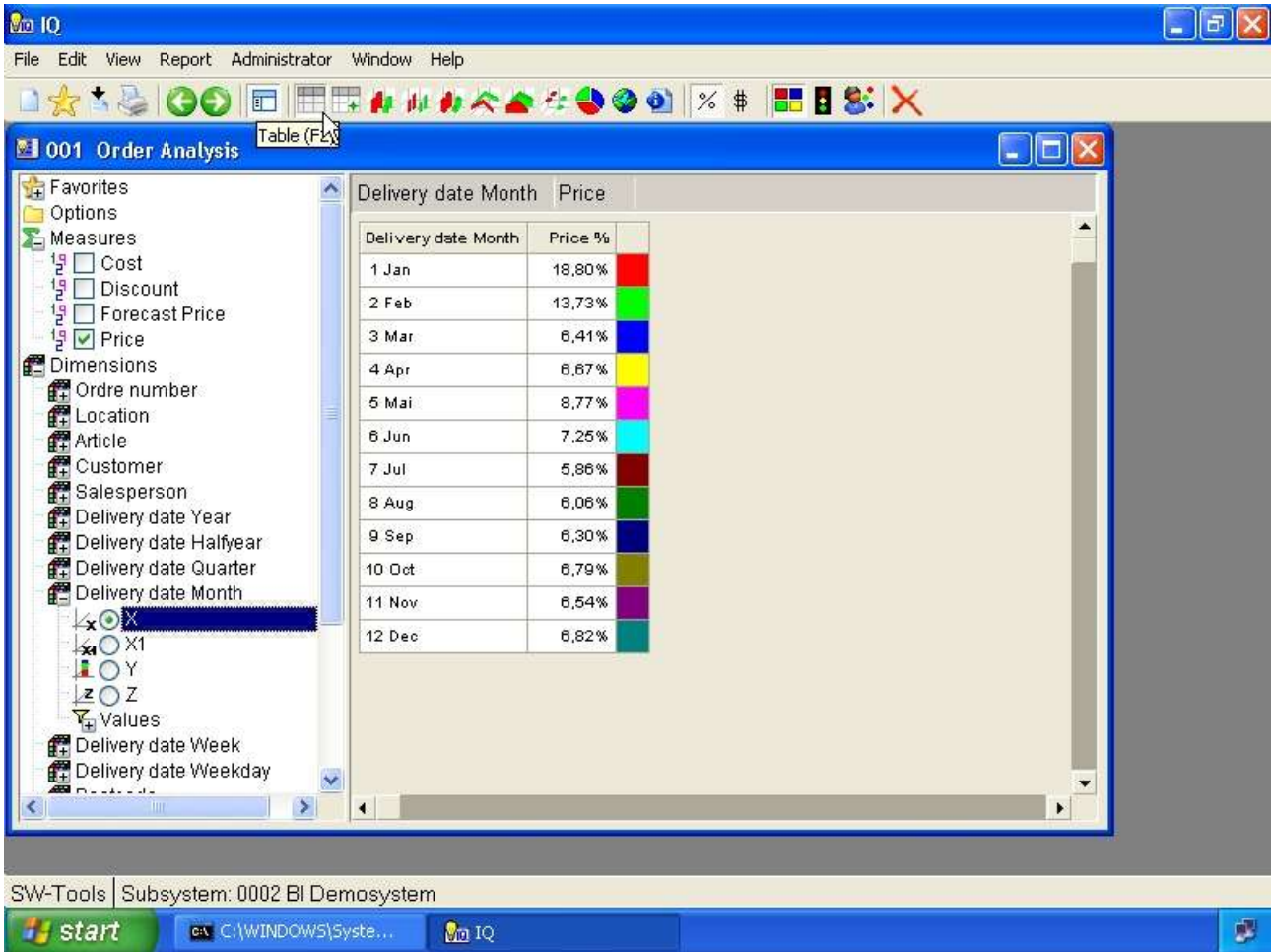
The chart may be displayed as 3D or 2D. You may control this with the menu  
- **View, Chart, 2D**



**17. Display 2D chart**

Please note that 2D chart will not be able to display the Z axis.

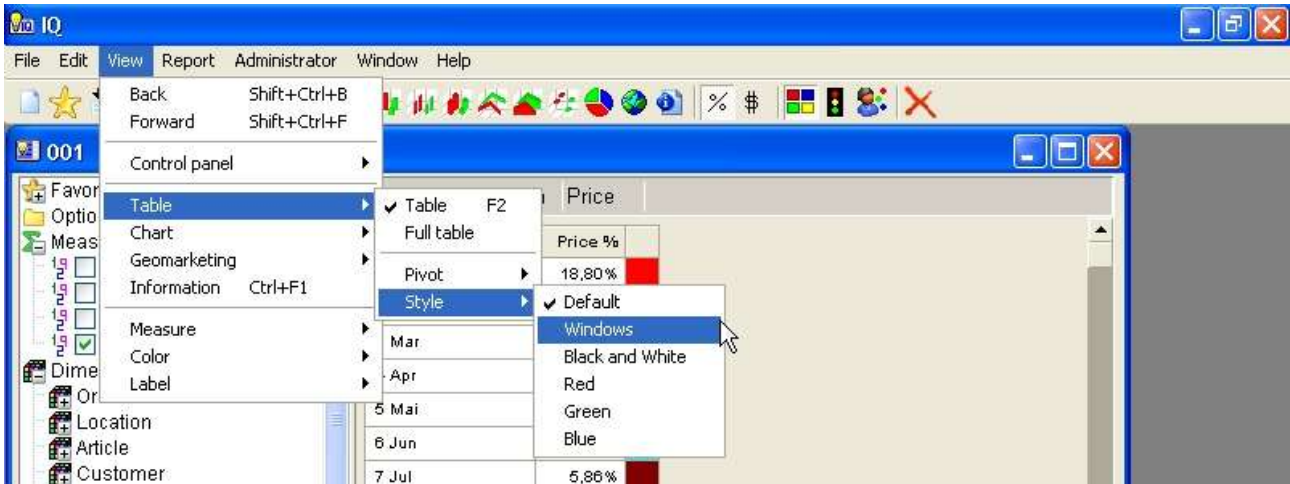
## 4. Table view



**18. Table view**

## 4.1. Styles

The following styles may be selected

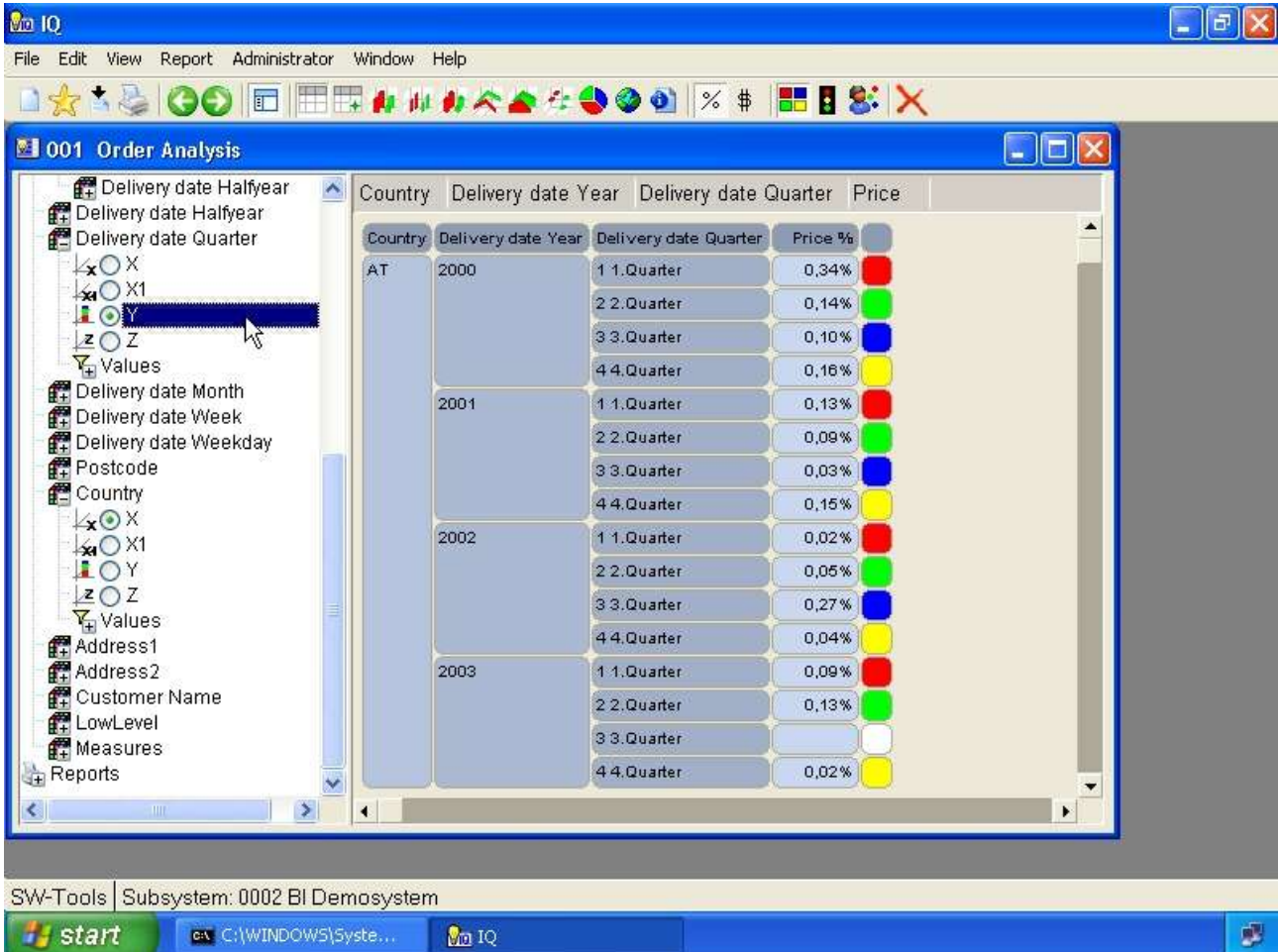


**19. Selecting table style**

## 4.2. Pivot function

The pivot function allows you to control if a table view should be displayed in rows or columns. This may be controlled for each axis X, X1, Y, Z.

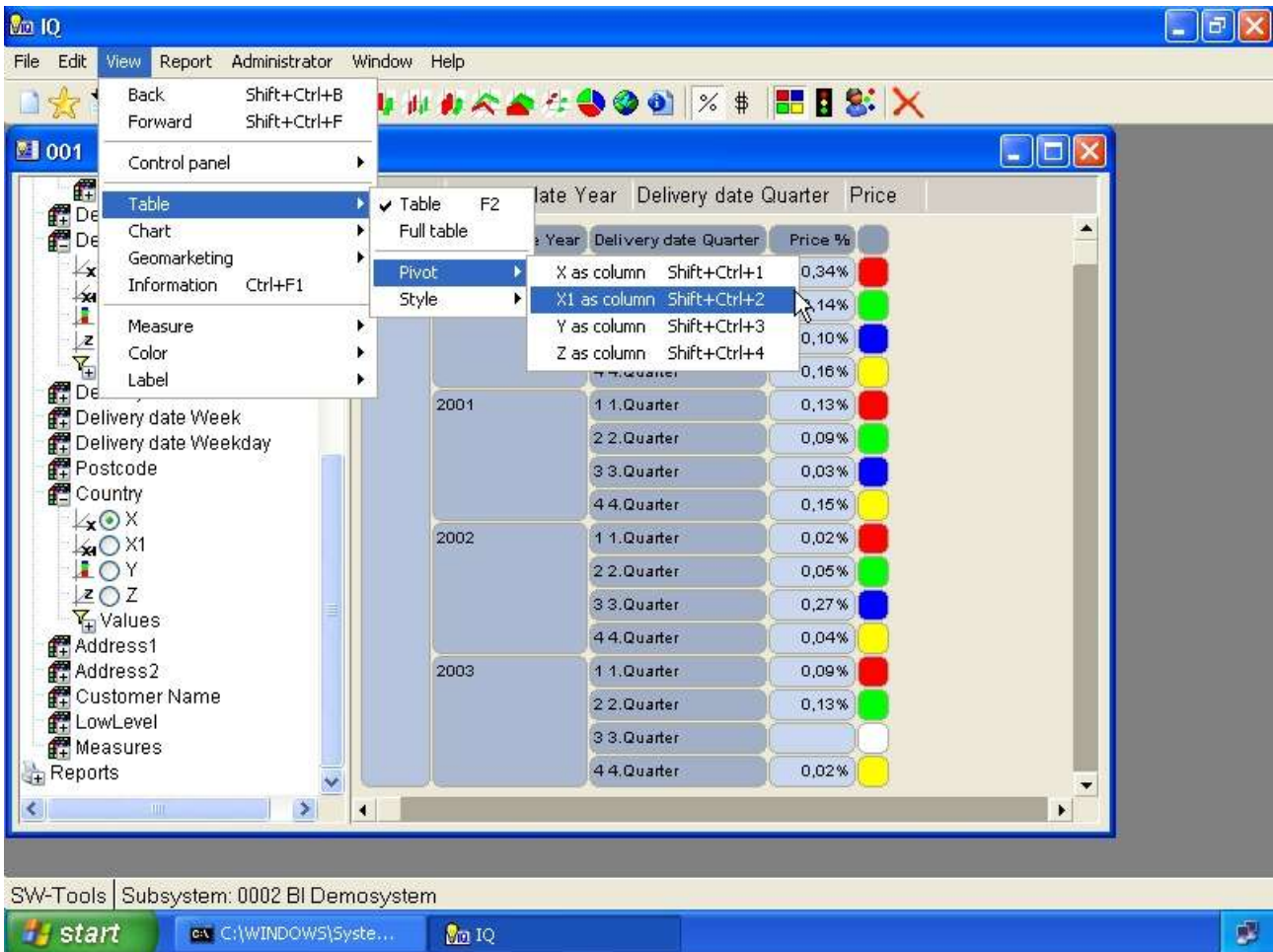
For example, if we have selected the following dimensions into a view



**20. Table view of 3 dimensions as rows**

and select the the menu





**21. Selecting pivot function X1 as column**

and in the same manner select the Y axis as column

The screenshot shows the Cube Viewer interface. On the left is a tree view with the following structure:

- Delivery date Halfyear
  - Delivery date Halfyear
  - Delivery date Quarter
    - X
    - X1
    - Y** (highlighted)
    - Z
  - Values
- Delivery date Month
- Delivery date Week
- Delivery date Weekday
- Postcode
- Country
  - X
  - X1
  - Y
  - Z
  - Values
- Address1
- Address2
- Customer Name
- LowLevel
- Measures
- Reports

The main area displays a pivot table with the following data:

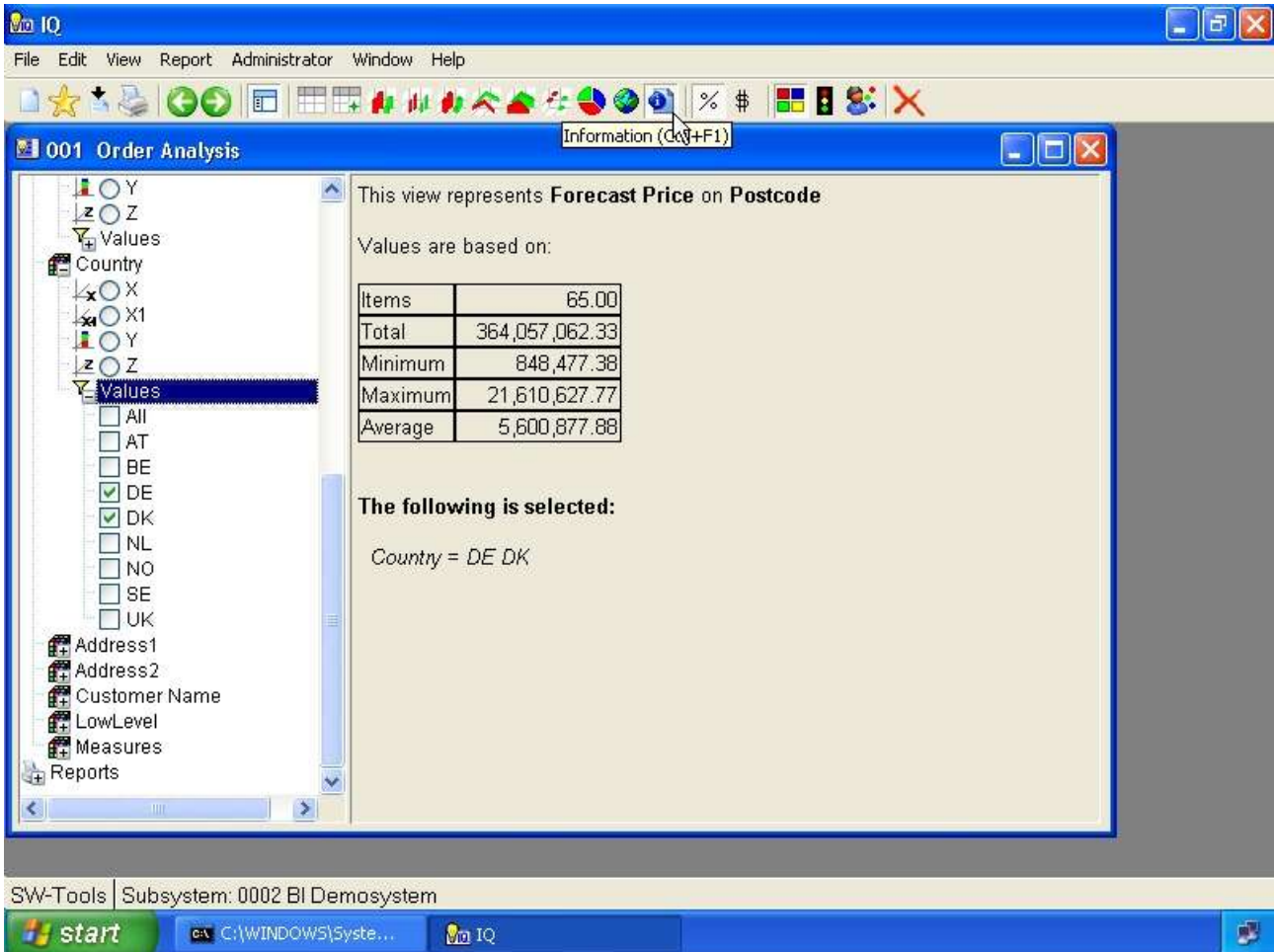
Country	1 1. Quarter	2 2. Quarter	3 3. Quarter	4 4. Quarter	Price
AT	0,34%	0,14%	0,10%		0
BE	0,18%	0,01%	0,11%		
DE	7,71%	1,16%	0,61%		0
DK	9,02%	2,46%	1,71%		3
NL	0,55%	0,25%	0,06%		0
NO	0,70%	0,09%	0,01%		0
SE	0,86%	0,15%	0,08%		0
UK	5,73%	0,94%	0,74%		0

**22. Pivot table with X1 and Y as column**

The pivot function delivers a better visual overview of the values in the table view.

## 5. Information view

The information view may at all times be used just like a chart, table or map view.  
The information will at all times show the following values according to the measure selected:



### 23. Information view

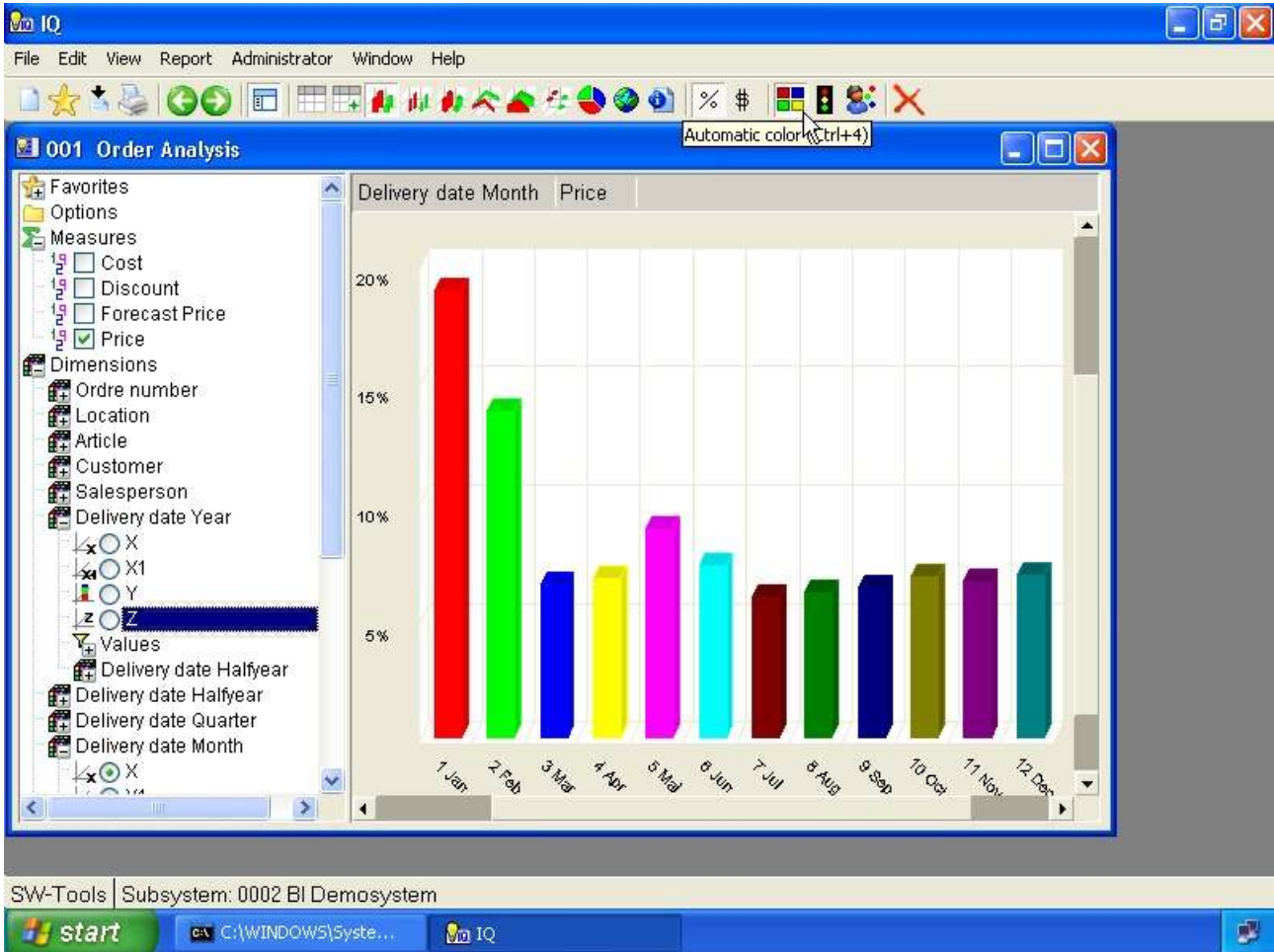
All selections, on any dimension, and global selections for multiple views will be listed here.  
This provides the detail description of the analysis.

## **6. Color control**

The color function is intended to make the charts to look nice for a presentation, visually be able to locate items that are below/above the average, or even according to a user defined calculation.

## 6.1. Automatic color

This color function has a predefined color table which cannot be modified. It is intended to make the chart look nice and to have a unique color for each item.

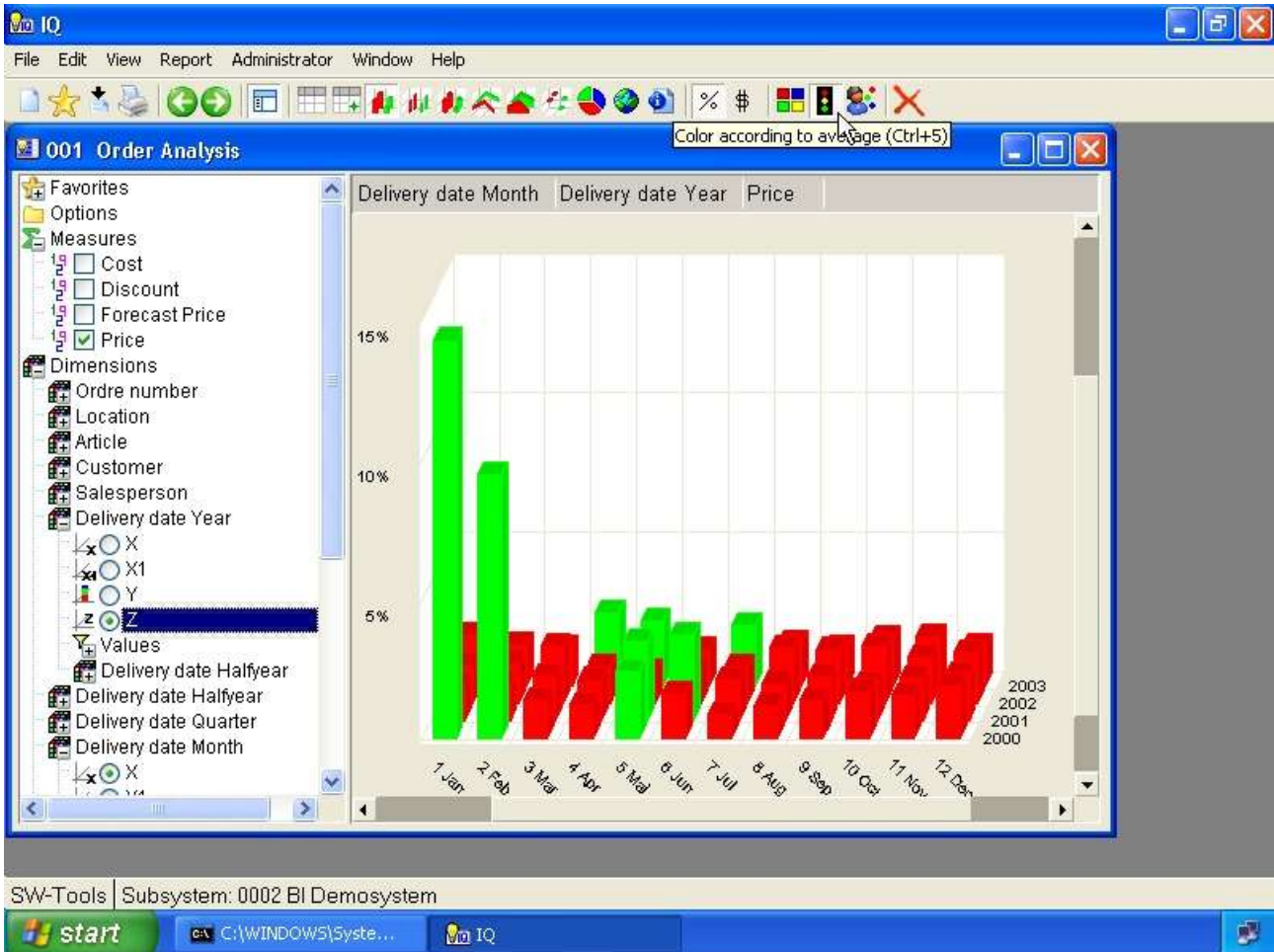


**24. Automatic color**

## 6.2. Color according to average

This color function will display a

- **Red color if the item is below the average value of the entire view**
- **Yellow color if the item is equal to the average value of the entire view**
- **Green color if the item is above the average value of the entire view**

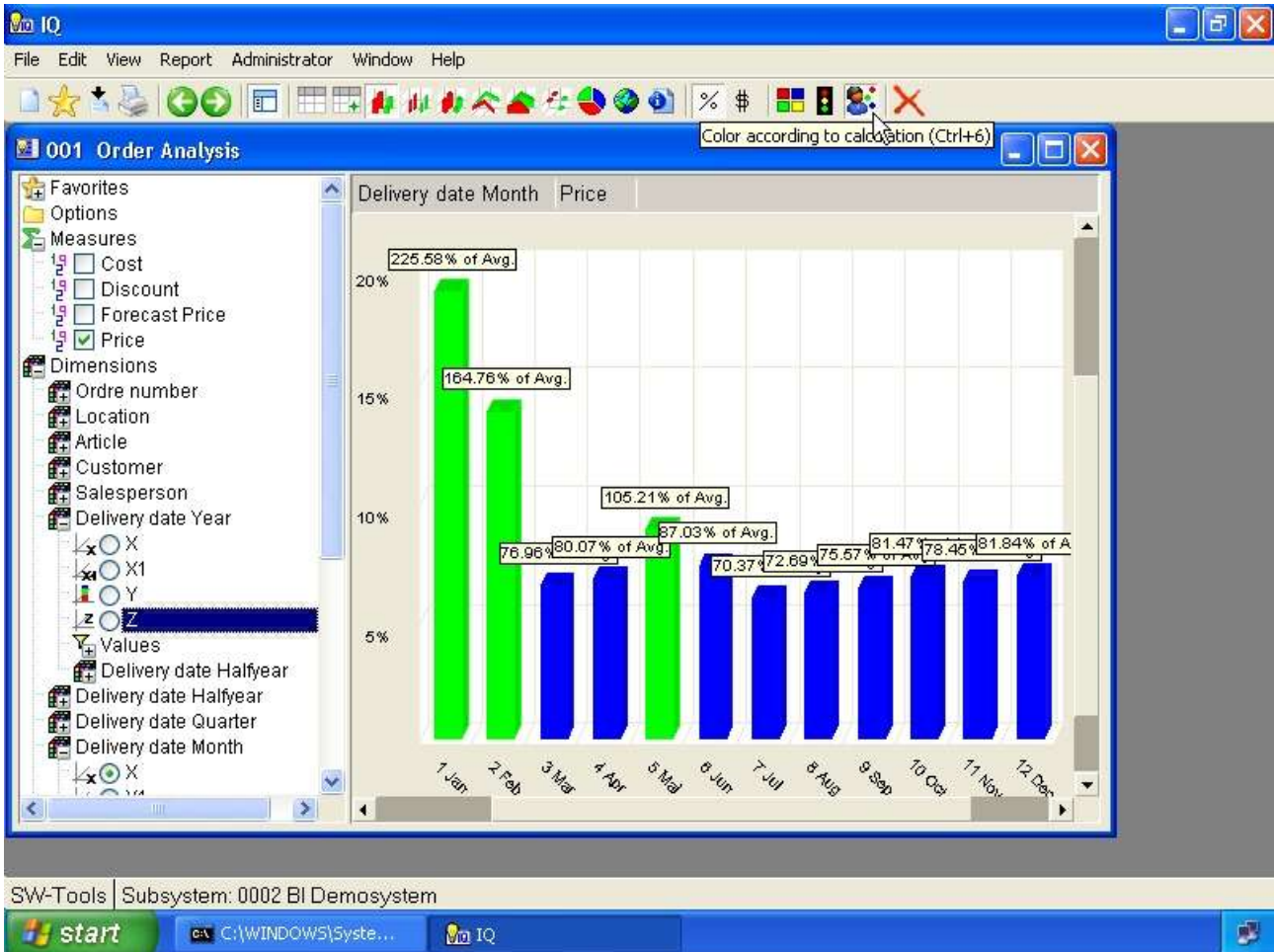


### 25. Color according to average

In order to know the exact values used for this please refer to the chapter **Information view**.

### 6.3. Color according to calculation

This color function may be modified by means of the calculation module. By default it provides a calculated color for an item but also a tooltip showing the  
**- Percentage of the average value for the view**



### 26. Color according to calculation

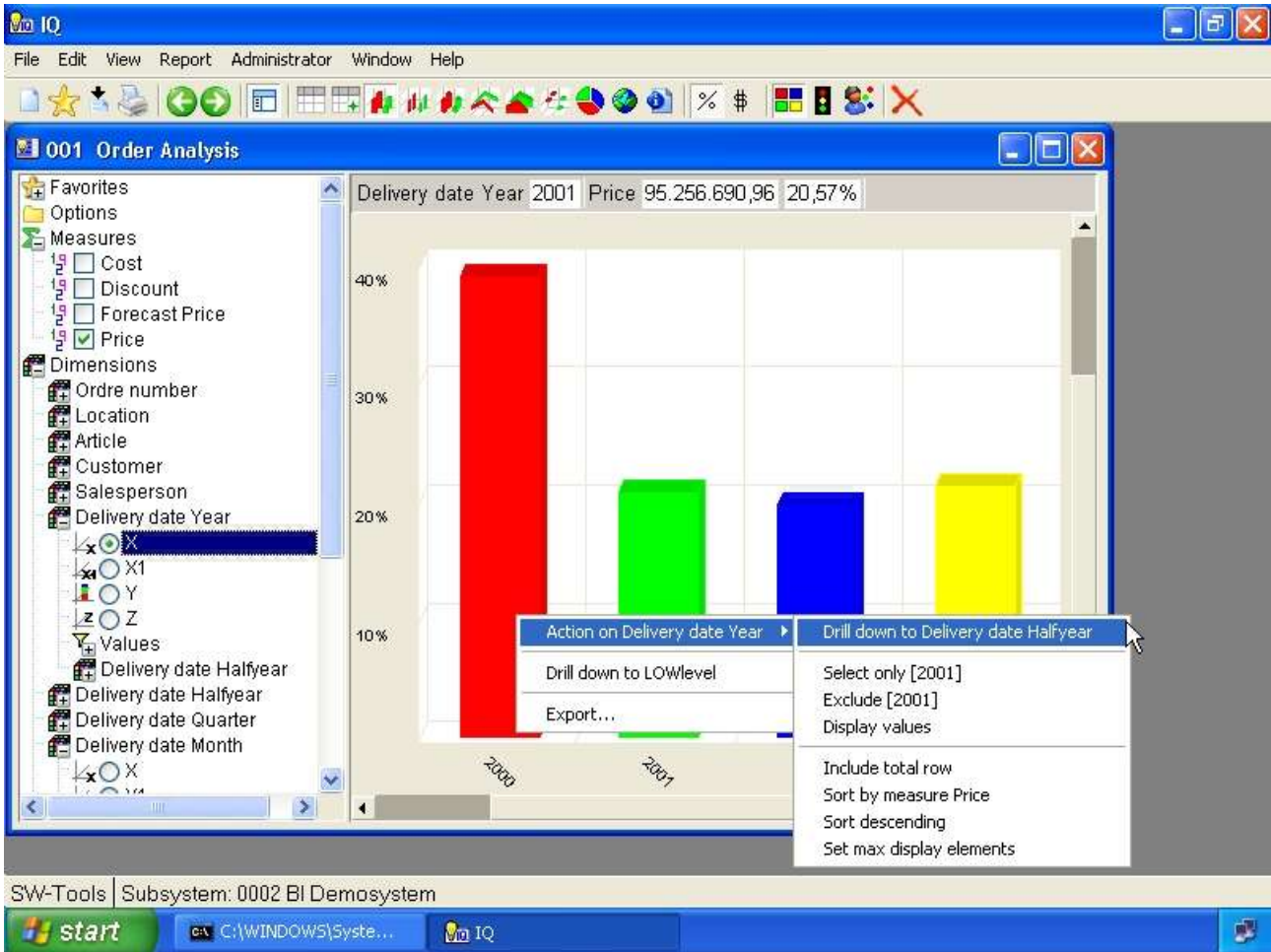
The calculated color is normally setup by the one who maintain the cube definition.

## **7. Drill-down**



## 7.1. How to drill-down

You may click on the chart item and select the menu item



### 27. Drill-down in date dimension

## 7.2. Single click drill-down

The menu **File, Settings, Single click drill-down** will make a single click on a chart item drill-down to the next level if and only if the item is designed for drill-down and not a the lowest level.

## 7.3. How to drill-up

The drill-up function may be done in two ways.

- **Selecting the toolbar item Back**
- **Right click on the item and select menu item Drill-up to ...**

## 8. Geomarketing

The cube viewer may not only analyse information using the chart or table view, but according to geographic information such as

- **Country**
- **State**
- **City**
- **Region**
- **Postalcode**

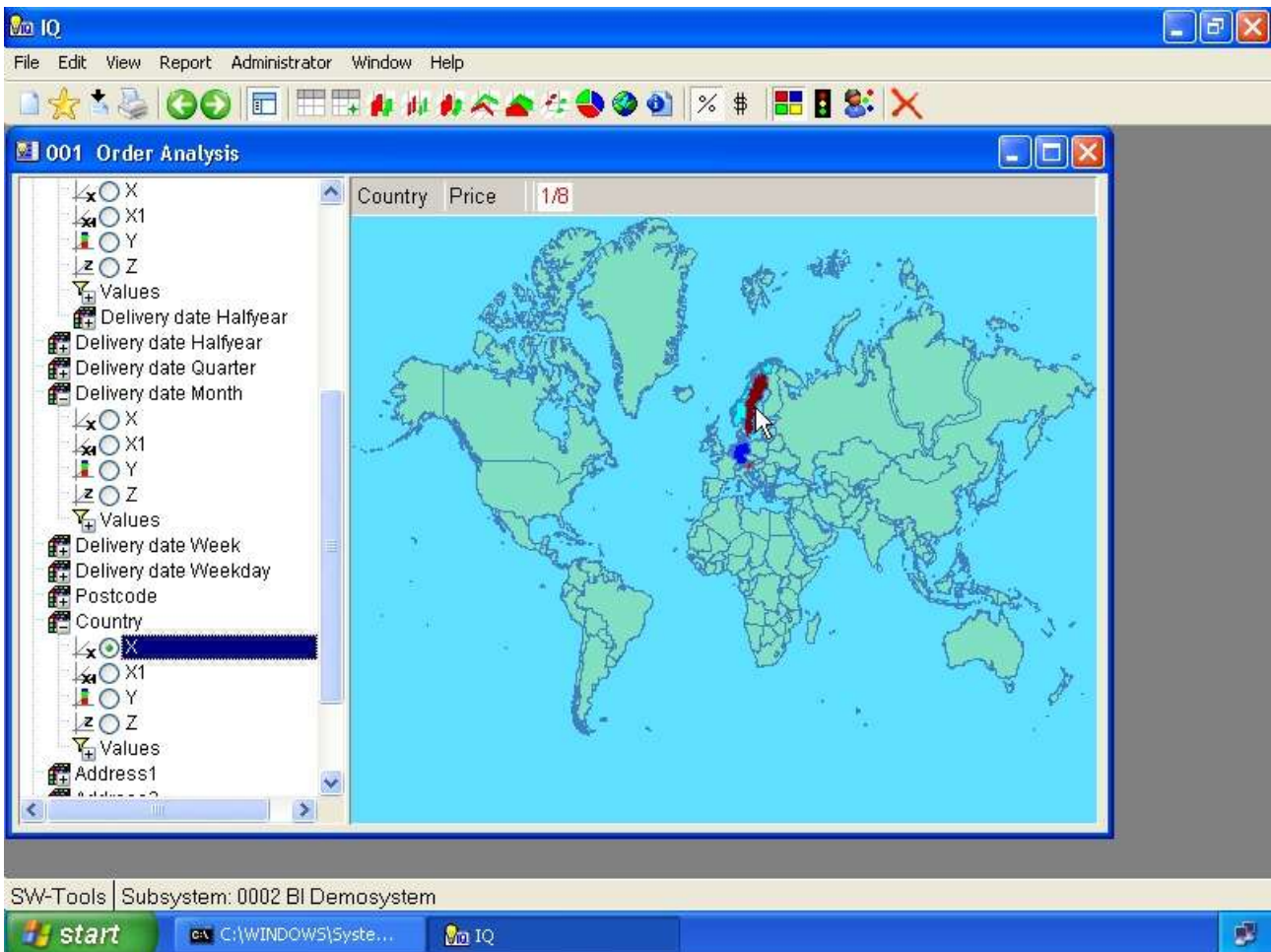
SW-Tools offers predefined maps for the geomarketing.

## 8.1. World map

The world map is delivered with the SW-Tools Business Intelligence package. It is free of charge.



**28. Selecting geomarketing map**



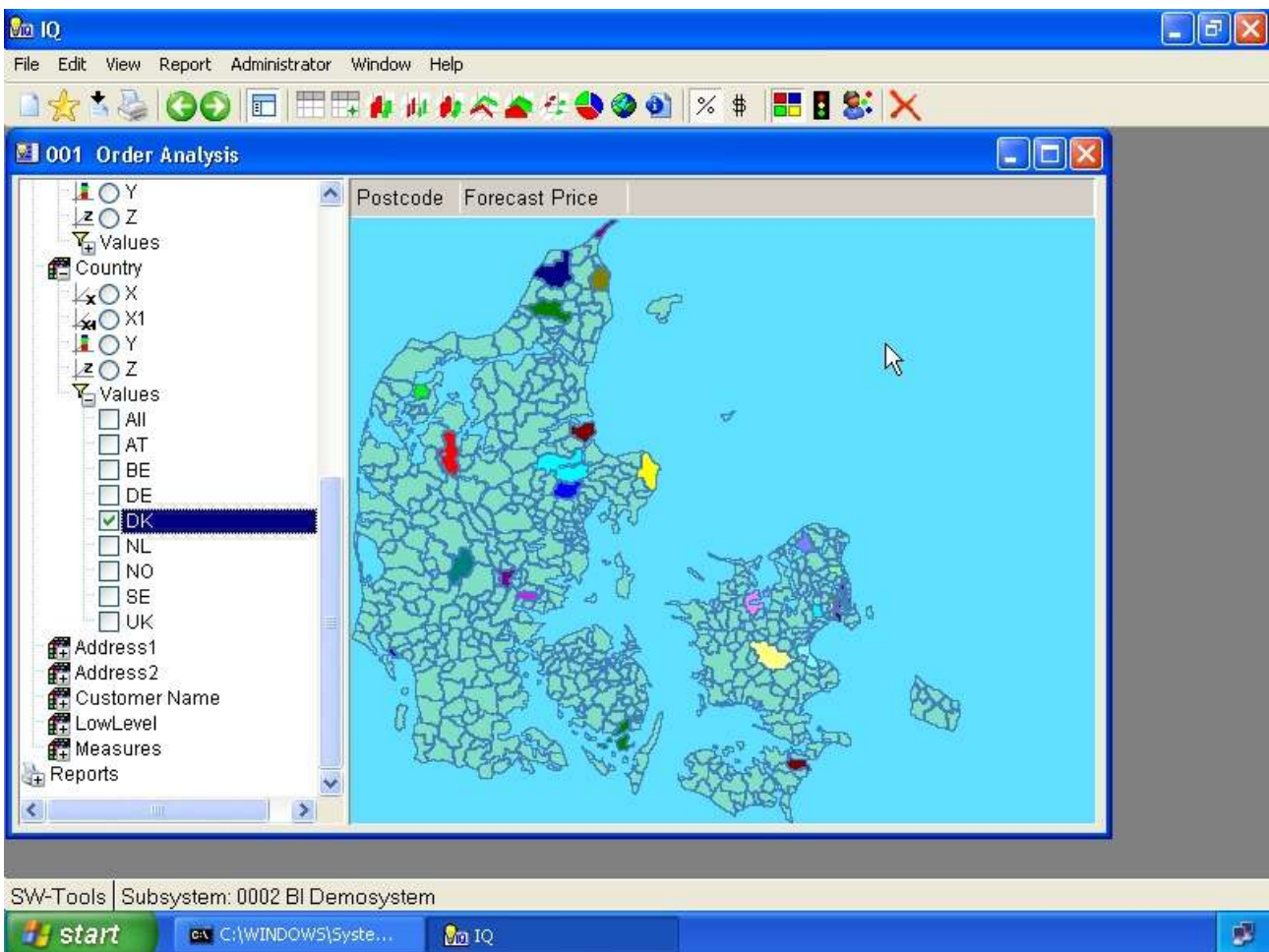
**29. Worldmap**

## 8.2. Other country specific maps

Currently SW-Tools offer the following country specific maps:

- **Austria, Regions**
- **Denmark, Country, State and Zipcode**
- **Germany, Regions, Tow & Country sectors, Zipcode 1 & 2 digit**
- **Sweden, Regions**
- **England, Postcode Area ID**
- **United States of America, States**

If this does not satisfy your need, please read chapter **User defined visualization using Microsoft PowerPoint** and the chapter **Export and Publish** where you have easy integration with the **Microsoft MapPoint** application.



**30. Danish Postcode map**

### **8.3. Support and license**

The world map is delivered with the SW-Tools Business Intelligence package. It is free of charge.

Please contact your SW-Tools partner for prices on other geomarketing maps provided by SW-Tools.

SW-Tools will maintain the maps and provide updates when necessary.

## 9. User defined visualization using Microsoft PowerPoint

Apart from the geomarketing feature described in the previous chapter, you are able to define your own visual maps using Microsoft PowerPoint.

Although it is impossible to describe what you may use this for, the possibilities are unendless and most importantly it is easy for you to use.

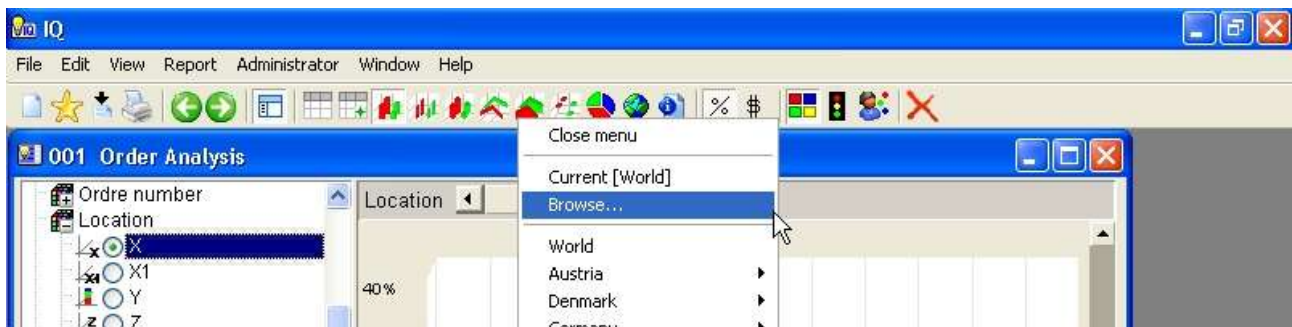
Even though SW-Tools or Microsoft MapPoint can provide maps for Postalcodes, States and Regions, most customers have their own

- **Sales regions**
- **Stock locations**
- **Office locations**
- **Customer areas**
- **Organizational diagrams**
- **etc.**

which almost certainly makes it an impossible task for SW-Tools to provide any imaginable map.

A perfect example if this is the cube used in this manual. Here we have a dimension names **Location** build from the two first digits of the article number. Nevertheless, this dimension represents the location of each article all over the world. Now to visualize this we have setup and saved a user defined map using PowerPoint.

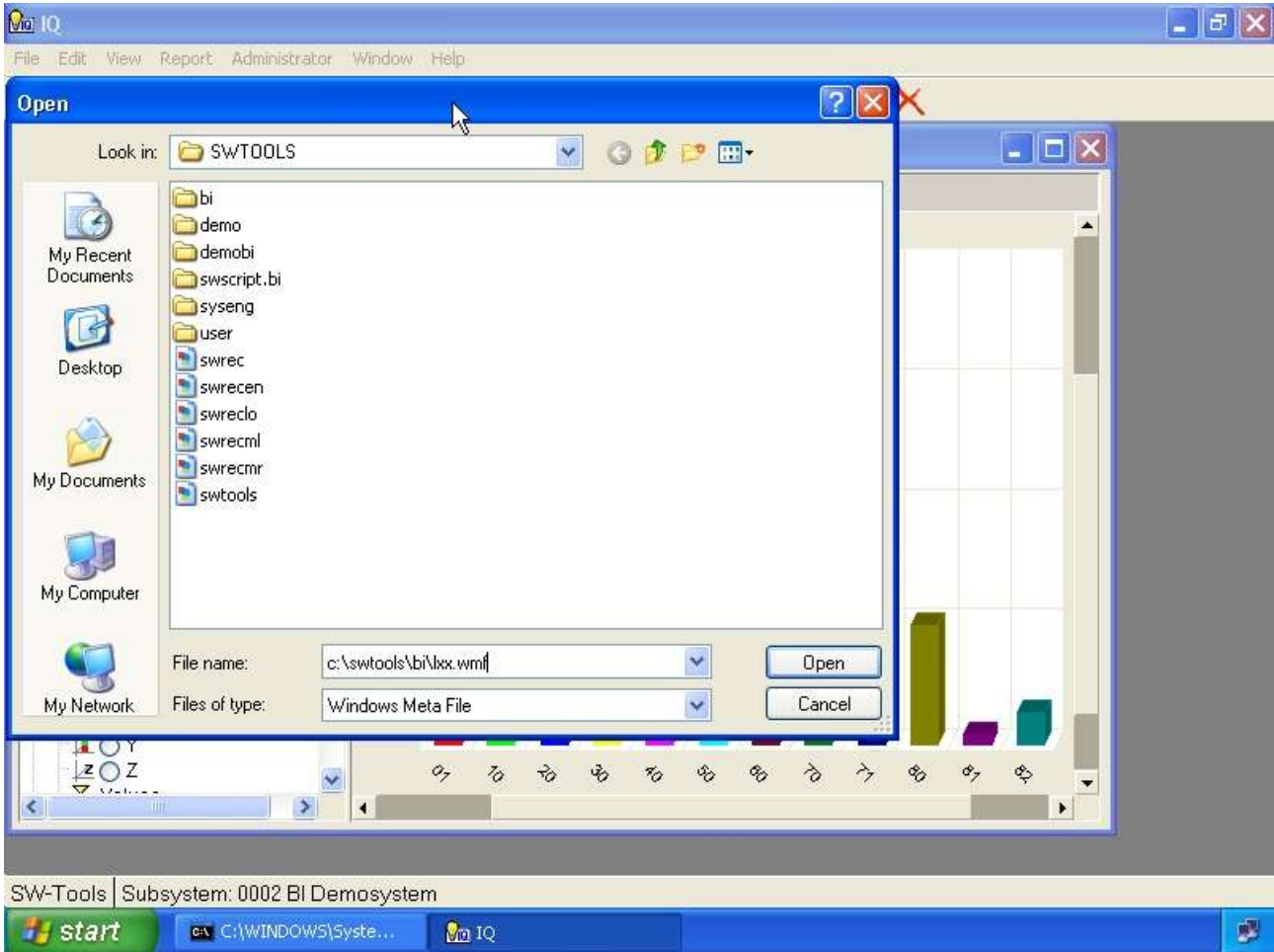
The user doing the analysis may now select this map by selecting the **Map** item on the toolbar



### **31. Selecting browse map**

The browse function allows the user to load a user specific map file, in the format Windows Meta File (.WMF). This format comes from how we have saved the slide in PowerPoint.

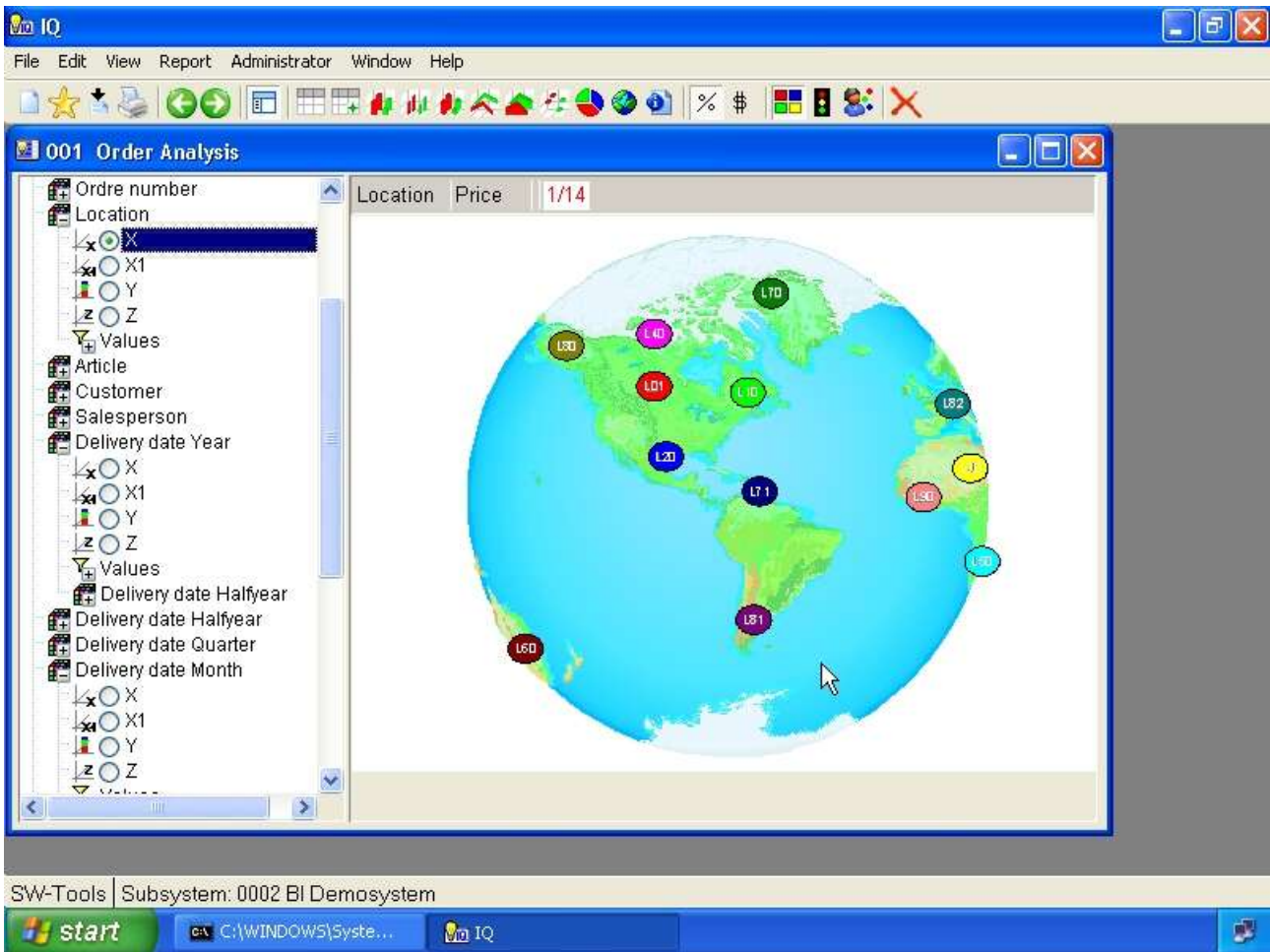




### **32. Browse for map file dialog**

The result will be a view of the user defined map, but with the same functionality as for the normal chart, table or SW-Tools geomarketing map view, e.g. color, label and mouse over functions.

# Cube Viewer



## 33. Powerpoint map view

## 9.1. Rules for the slide definition

The rules for defining a PowerPoint slide is simple. You insert any kind of item that PowerPoint can, such as symbols, pictures, etc.

Please refer to the sample map in the file

**c:\swtools\bi\maps2.ppt**

Now, to represent a value of a dimension in the slide you need to insert some kind of symbol, clipart where you are able to control the fill color. On the sample map for the article location we have chosen to use the circle symbol.

Once the symbol have been inserted on the slide you need to follow the rules describes here.

### **9.1.1. Fill color rule**

The fill color must be set according to a specific RGB (Red, Green, Blue) color.

- **Red may be set to a value from 0 to 255**
- **Green may be set to a value from 0 to 255**
- **Blue MUST ALWAYS BE SET TO 1**

This allows you to make a possible 65536 different items on one map.

## 9.1.2. Textbox rule

So that the map can link the color of the item to a dimension value you need to insert a textbox somewhere on the slide. The textbox should then contain one line of text for each symbol inserted in the slide

**SWMAP;8;70**

where the 3 columns are separated by a semicolon.

The first column is fixed to the text SWMAP.

The second column is the reference to the color set on the symbol. In this example the symbol must have been set to a fill color, where Red=8, Green=0 and Blue=1.

The third column contain the actual value of the dimension, e.g. 70 is the article location.

## 9.2. How to save the slide as a map file

First of all you need to save the PowerPoint file as you would normally do. This is then the master file of your defined map(s).

Secondly, it is important to remember that the SW-Tools Business Intelligence cannot read the PowerPoint file directly, it need to have the map as a Windows Meta File (.WMF).

To save a slide in such a format you need to select the PowerPoint menu

**- File, Save as...**

enter a filename, e.g.

**c:\swtools\bi\lxx.wmf**

and select the filetype

**Windows Meta File**

press **OK** and answer **Current slide** when asked.

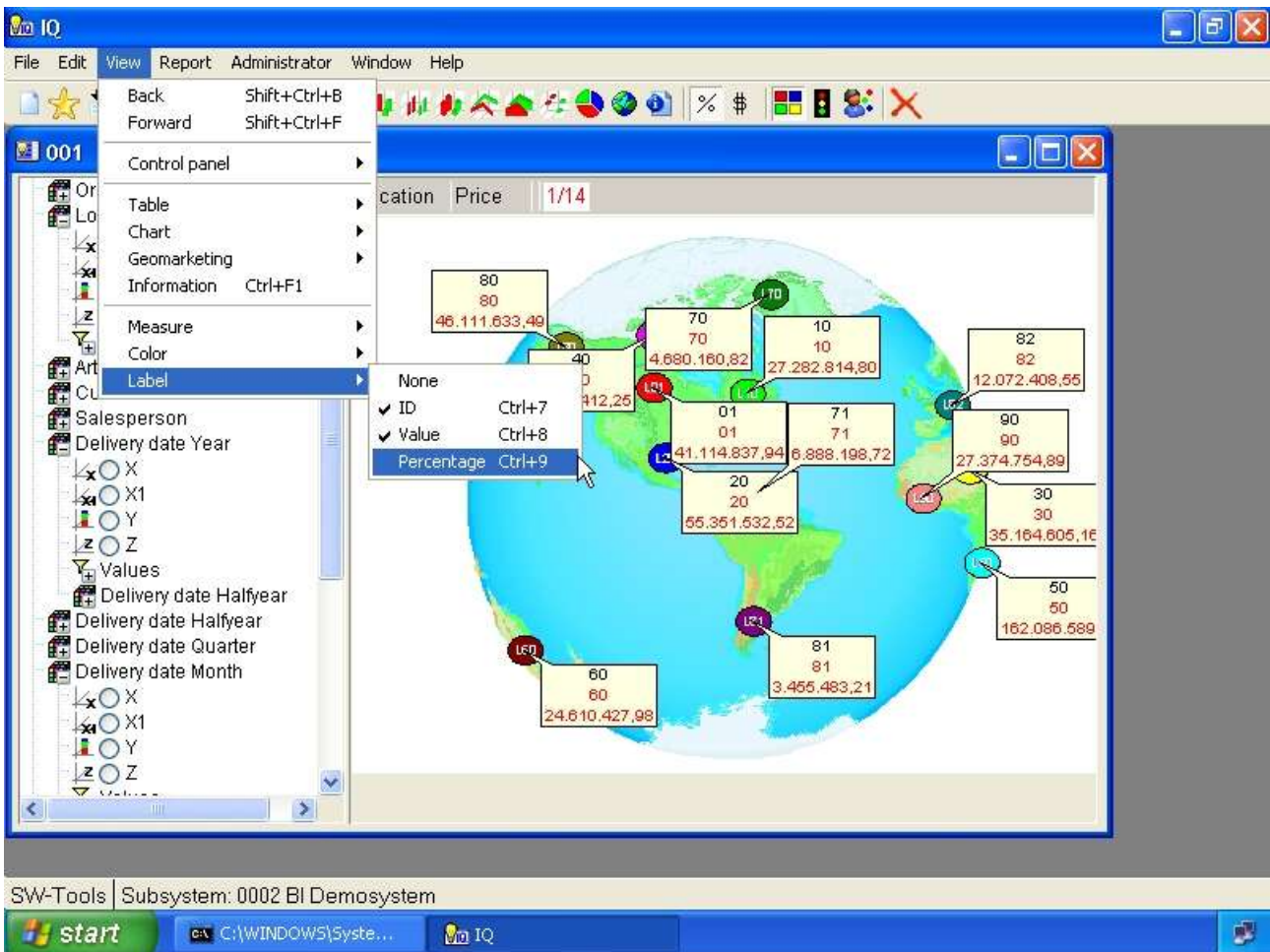
## 10. Labels

The following labels may be shown/hidden.

- **ID**
- **Value**
- **Percentage**

By default all labels are hidden. If you need to know the value of a specific item on the chart or in the table move the mouse over the item and the values will be displayed in the top left part of the view area.

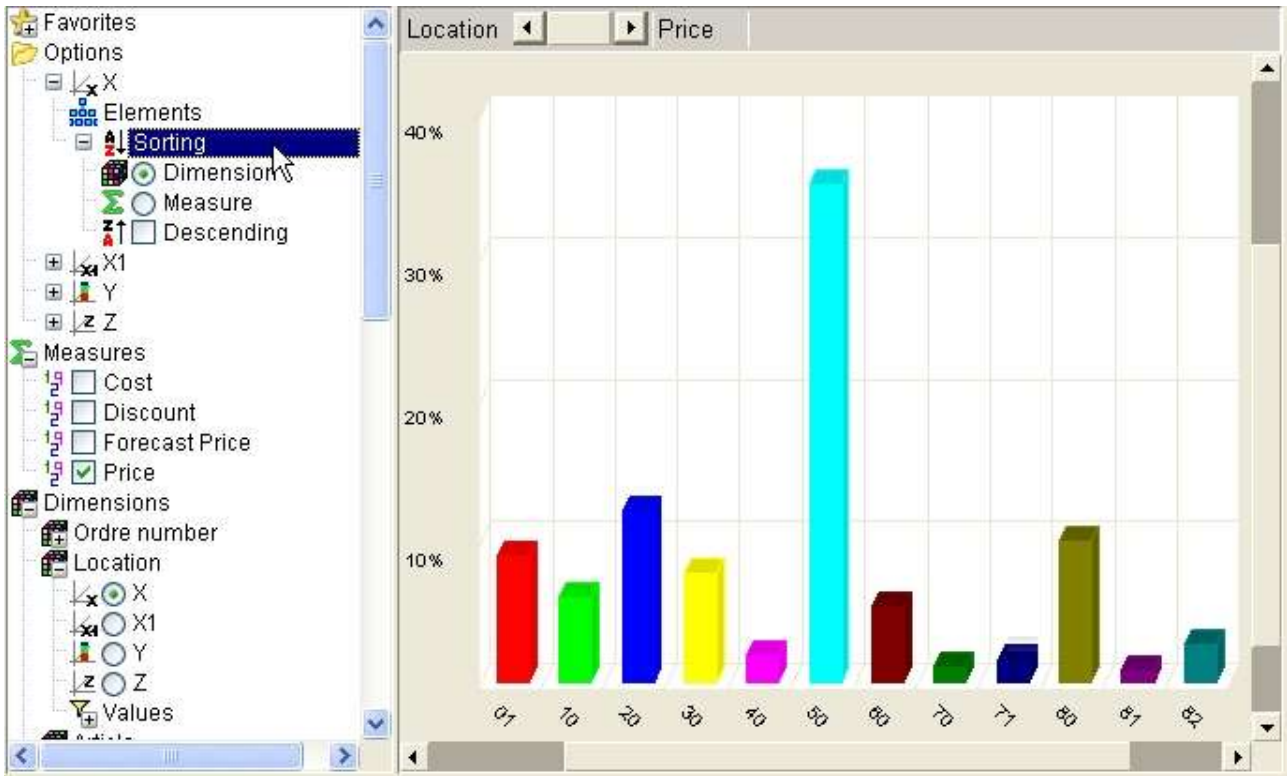
When you have selected label **ID** and **Value** and is about to select label **Percentage** the view will look like this:



### 34. Selecting labels

## 11. Sorting and view settings

Sorting and maximum number of elements may be controlled for a view. This is done within the section **Options** in the controlpanel or by right click on the view area using. If you right click a menu is displayed from where you may select what you want to do.

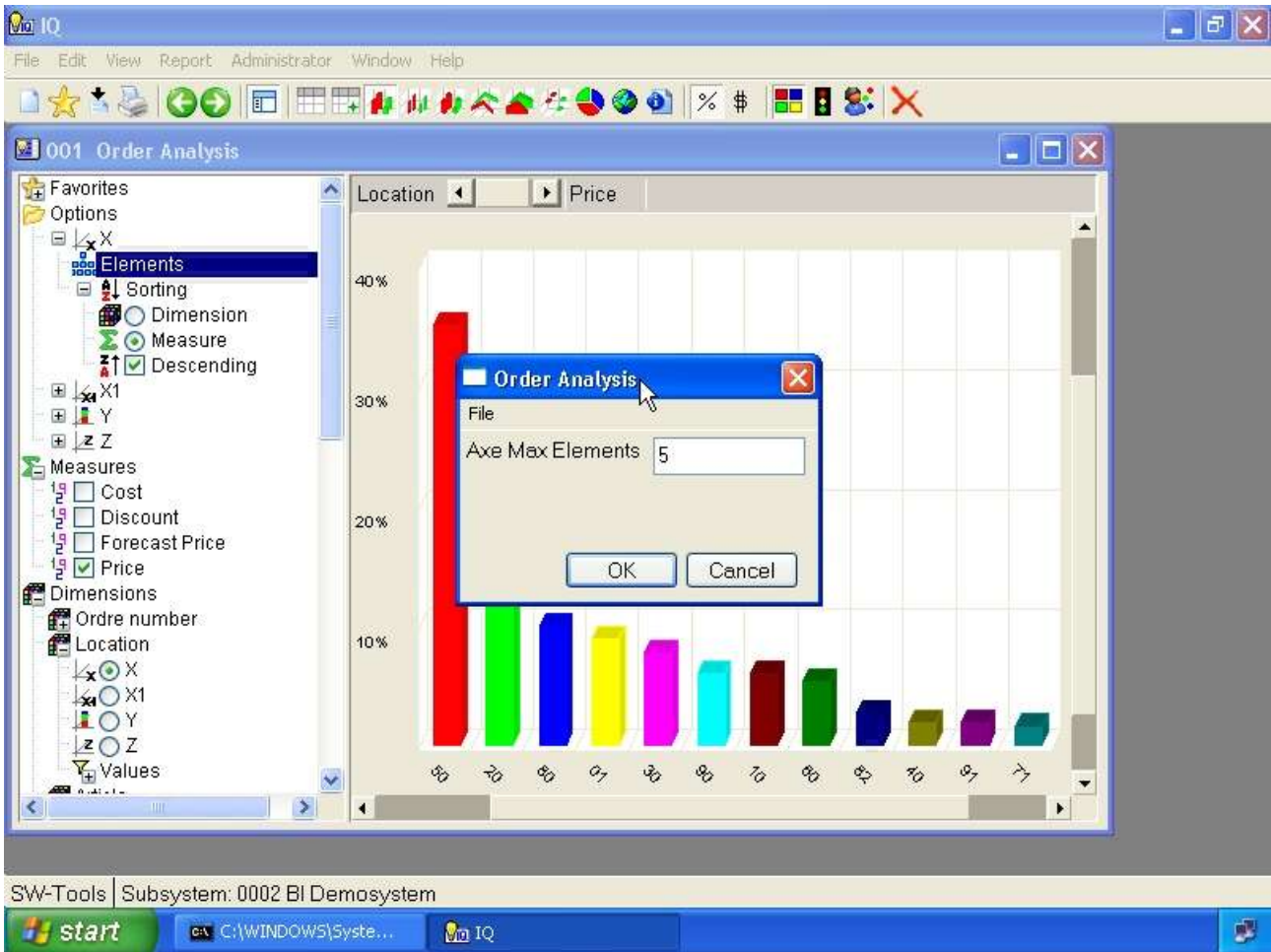


**35. Options for the X axis**



## 11.1. Maximum number of elements

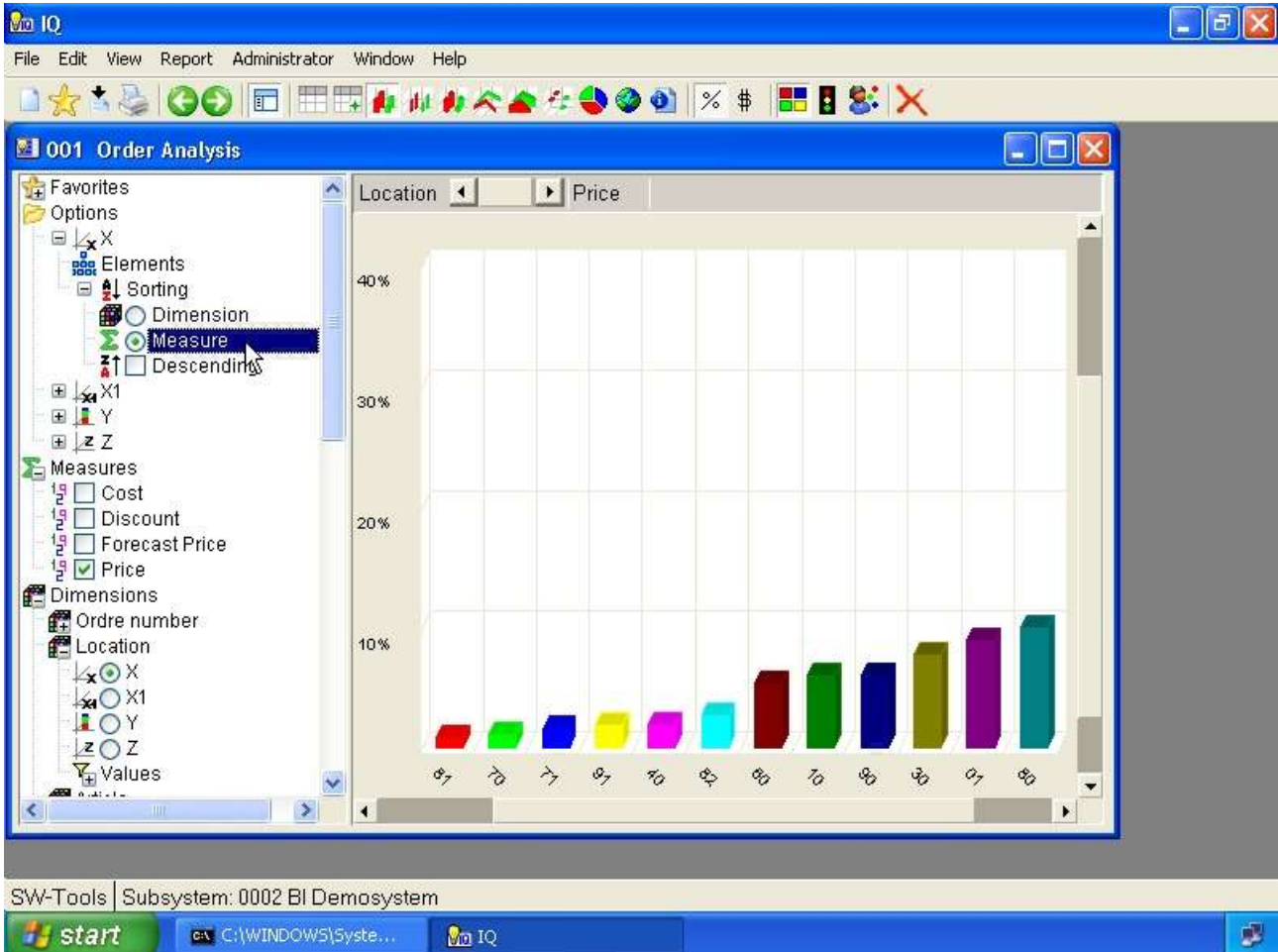
The options section in the control panel may be used to set the maximum number of elements displayed in a view. The default number of elements is



**36. Setting maximum number of elements in a view**

## 11.2. Sorting

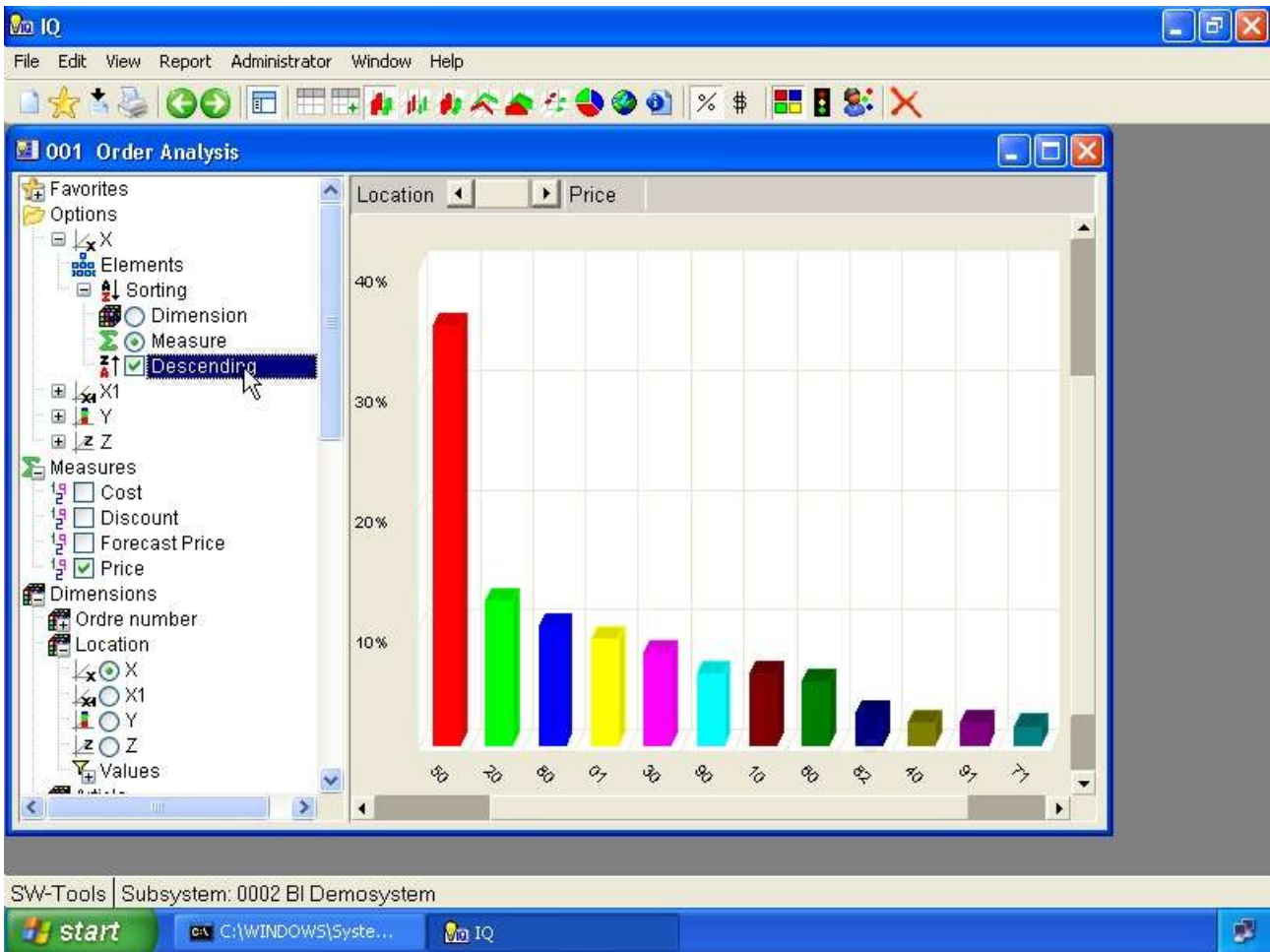
The sorting may be done according to one or more of the axis X, X1, Y and Z. You may sort according to the dimension value, which is the default behavior, or according to the value, e.g. measure selected.



### 37. Sorting according to measure

Also, the sorting is by default in ascending order, but may be checkmarked to be in descending order instead.

# Cube Viewer



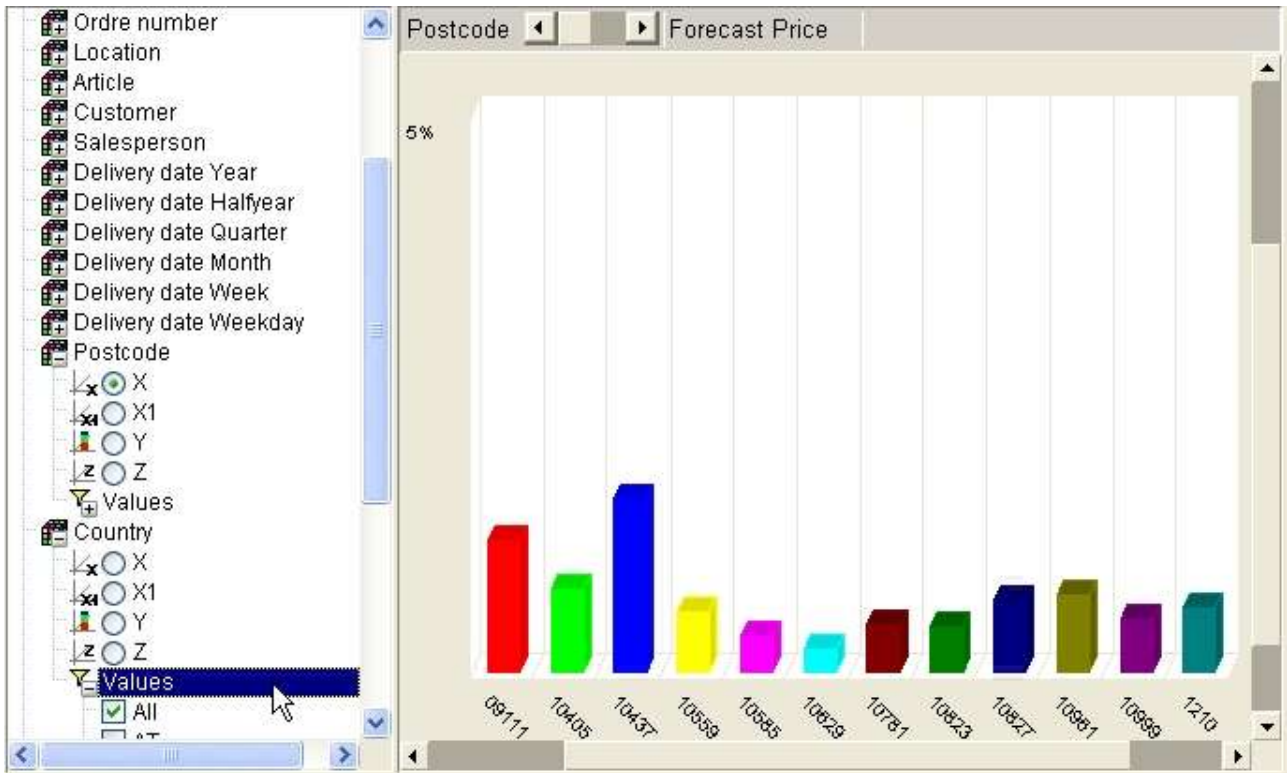
**38. Sorting in descending order**

## 12. Selections

Selections allow you to limit the view of any analysis. The selection is made within any dimension in the controlpanel in the section

## 12.1. All values - no selection

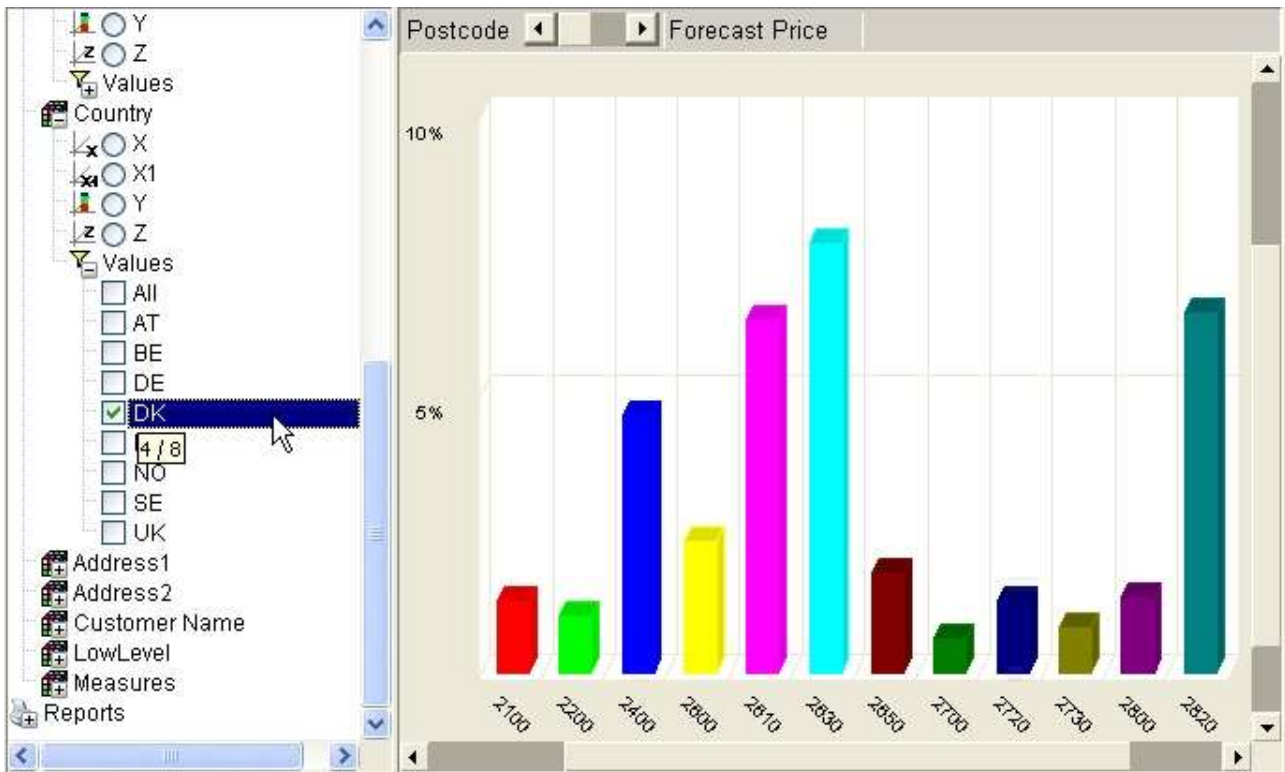
This option will include all values of a dimension, e.g. no selection is made.



**39. Selecting all dimension values**

## 12.2. Individual values

Individual values may be checked one by one.



**40. Selecting one dimension value**

### 12.3. Advanced selection dialog

Instead of having to checkmark dimension values one by one you may right click on **Values** and choose the menuitem **Selection...**. The dialog allows you to enter a search criteria for text or numeric values.

For the text search you may use \* and ? to include values, e.g.

**D\***

searches for all values beginning with D.

For numeric values you may enter multiple values separated by comma and a range of values using the minus sign between the first and last value, e.g.

**1-7,17**

searches for the numeric values 1 to 7 and 17.



**41. Advanced selection dialog**

## **13. Favorites**

The favorite section is used to store view. A view may be defined with all settings described in this manual, such as sorting, chart type etc. and hereafter saved as a favorite.



## 13.1. Add a favorite

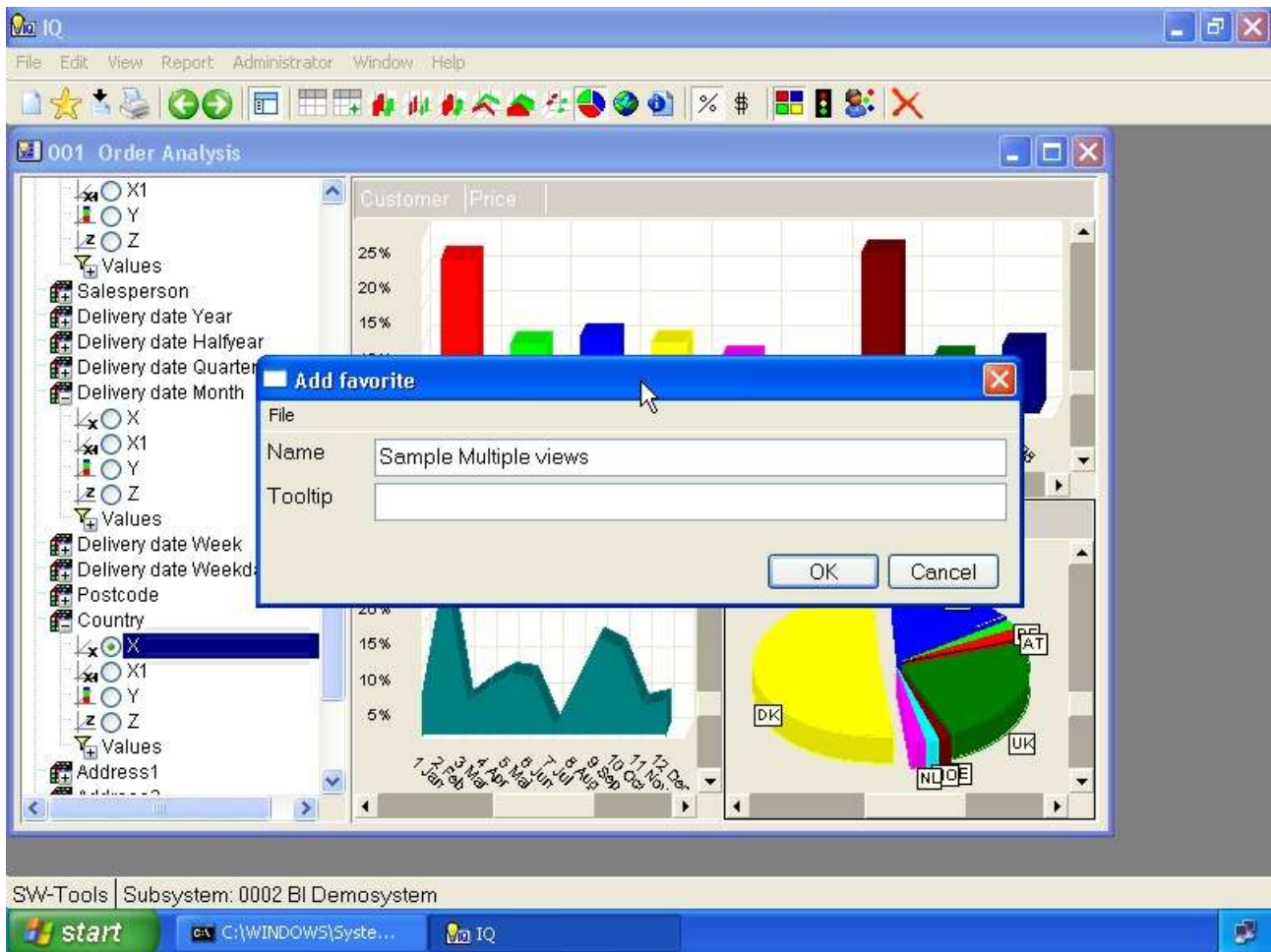
To add a favorite you need to select the following toolbar item:



### ***42. How to add a favorite***

## 13.2. Favorite information

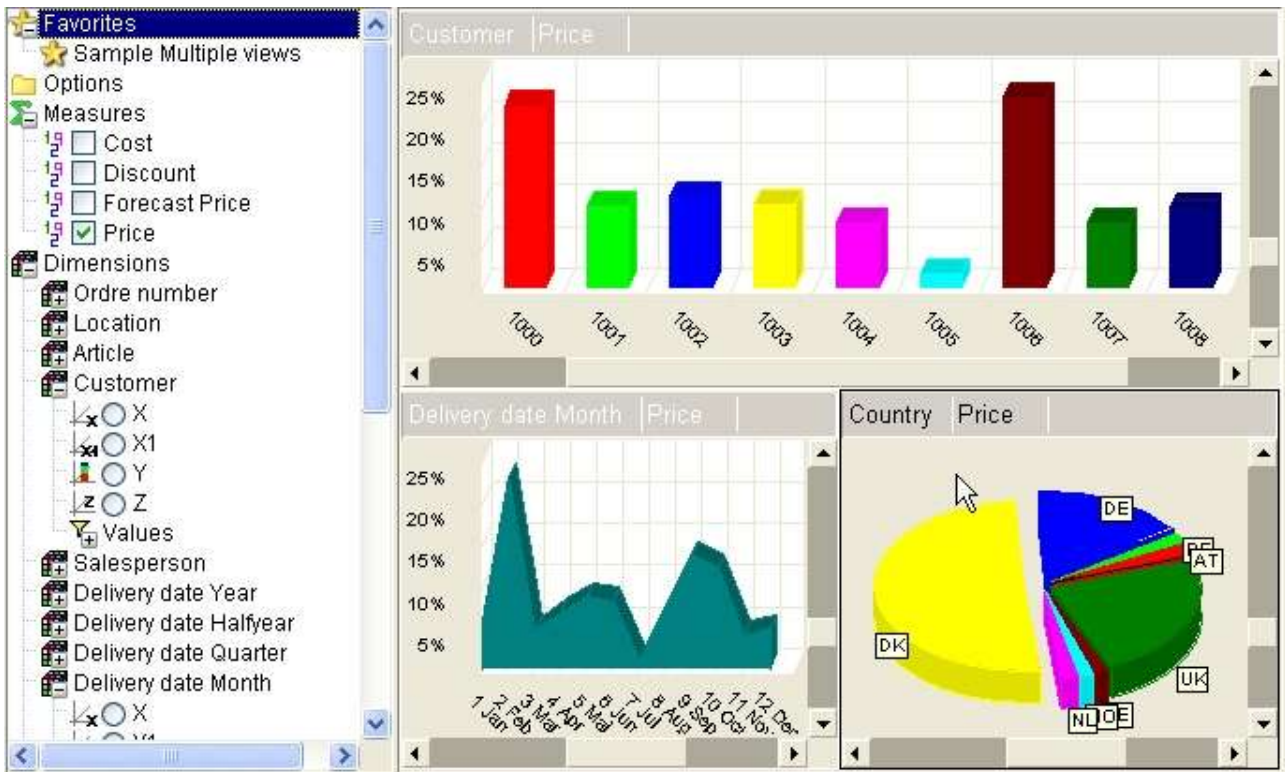
The favorite dialog look like this. The name will be listed in the controlpanel view.



**43. Dialog for favorite information**

### 13.3. List of favorites

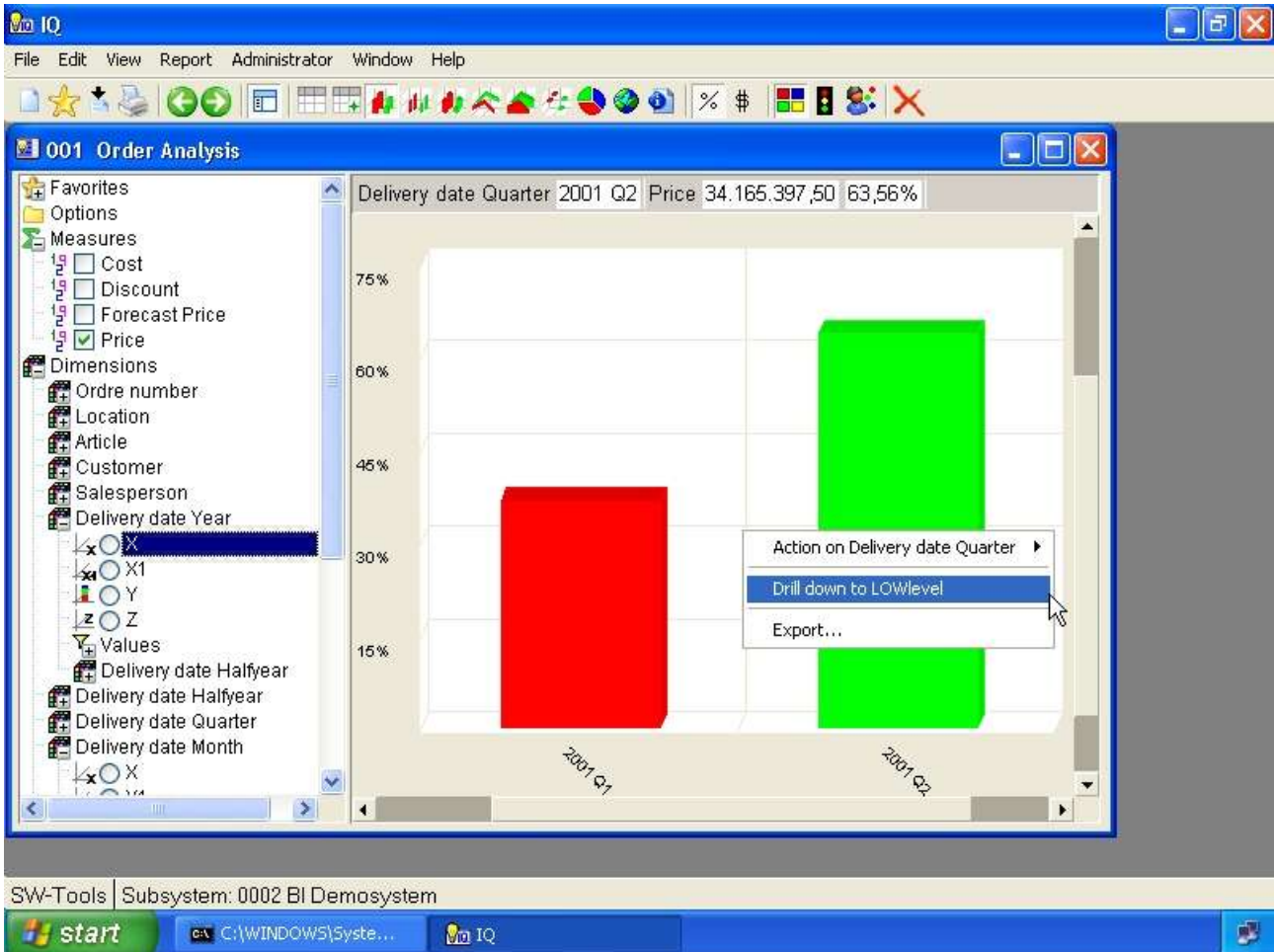
Once a favorite have been added the controlpanel will list it like this:



**44. Control panel view of added favorites**

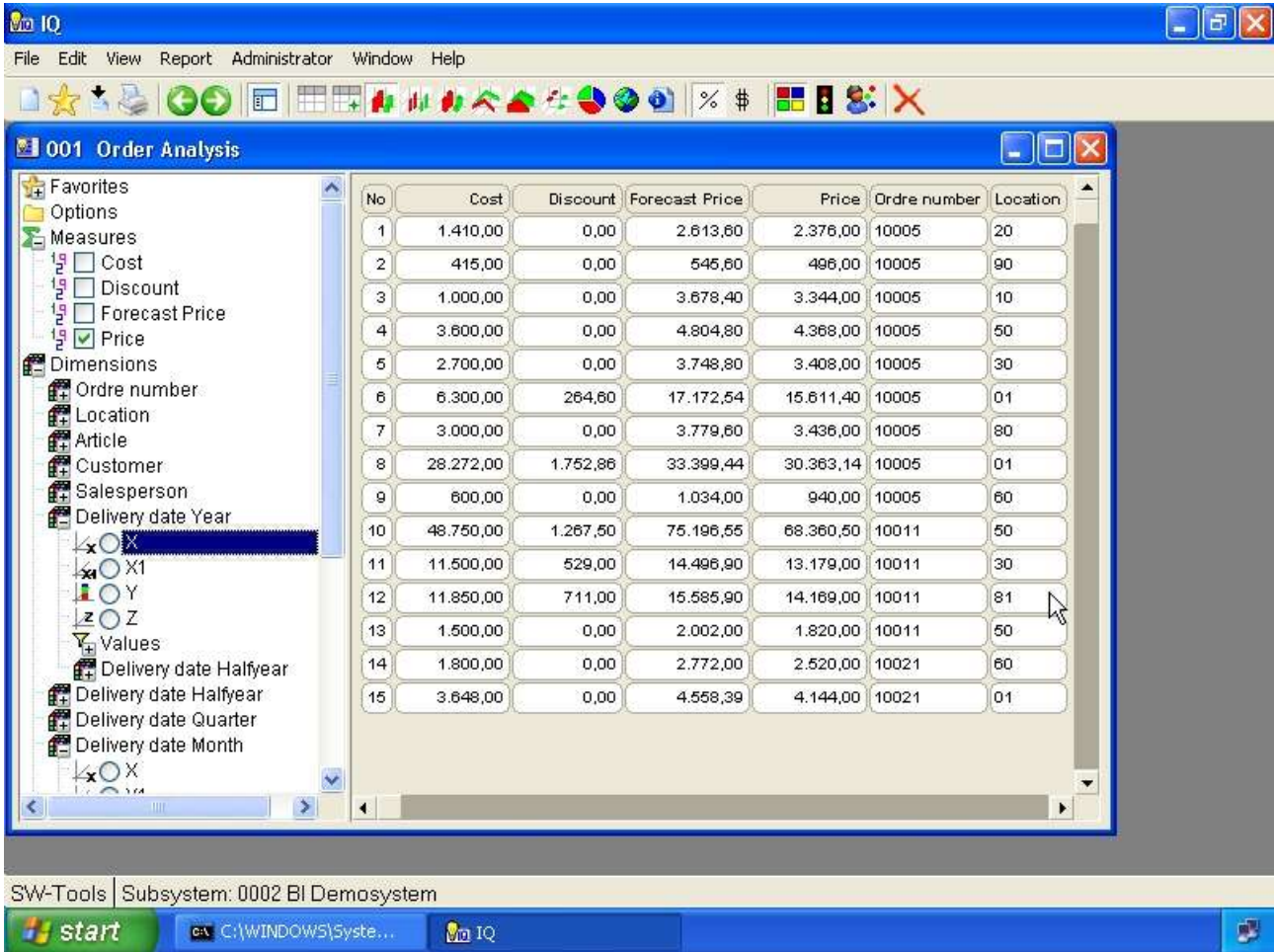
## 14. Lowlevel data

In order to drill-down to low level data the cube must have been build with lowlevel data. The lowlevel data may be selected when you click on an item with in the chart or table. The menu that is presented contain a menu item



### 45. Menu for lowlevel drill-down

When selected the view area will change to a table view that shows all collected records for the particular item selected.

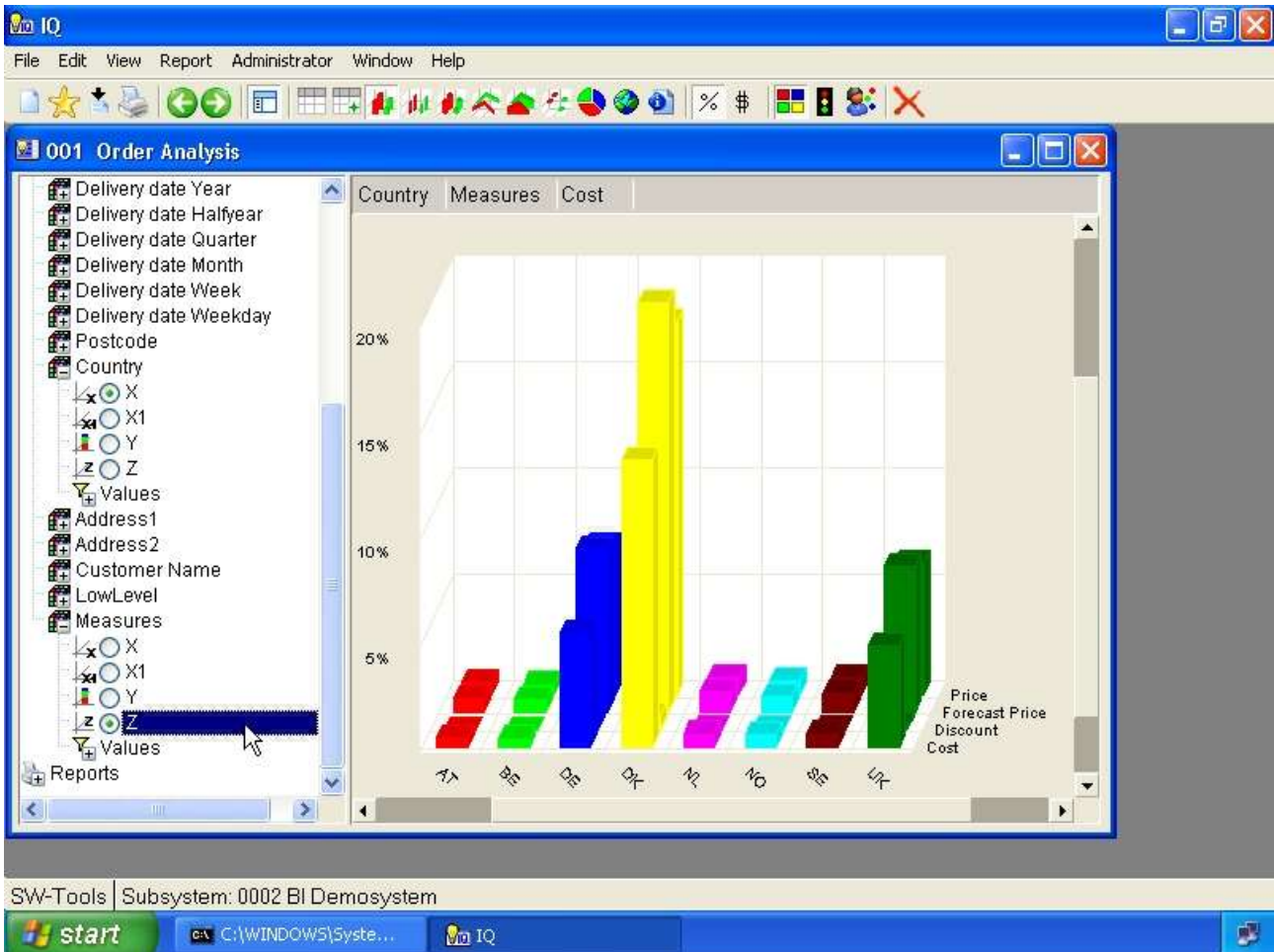


### 46. Drill-down data view

In order to go back from the drill-down table view you need to select a chart or table type.

## 15. Comparing multiple measures

If the control panel contain a dimension item named **Measures** it is possible to compare multiple measures in the analysis. Because the measures is treated as a dimension it can be selected into a view on any axis.



### 47. Multile measures in a view

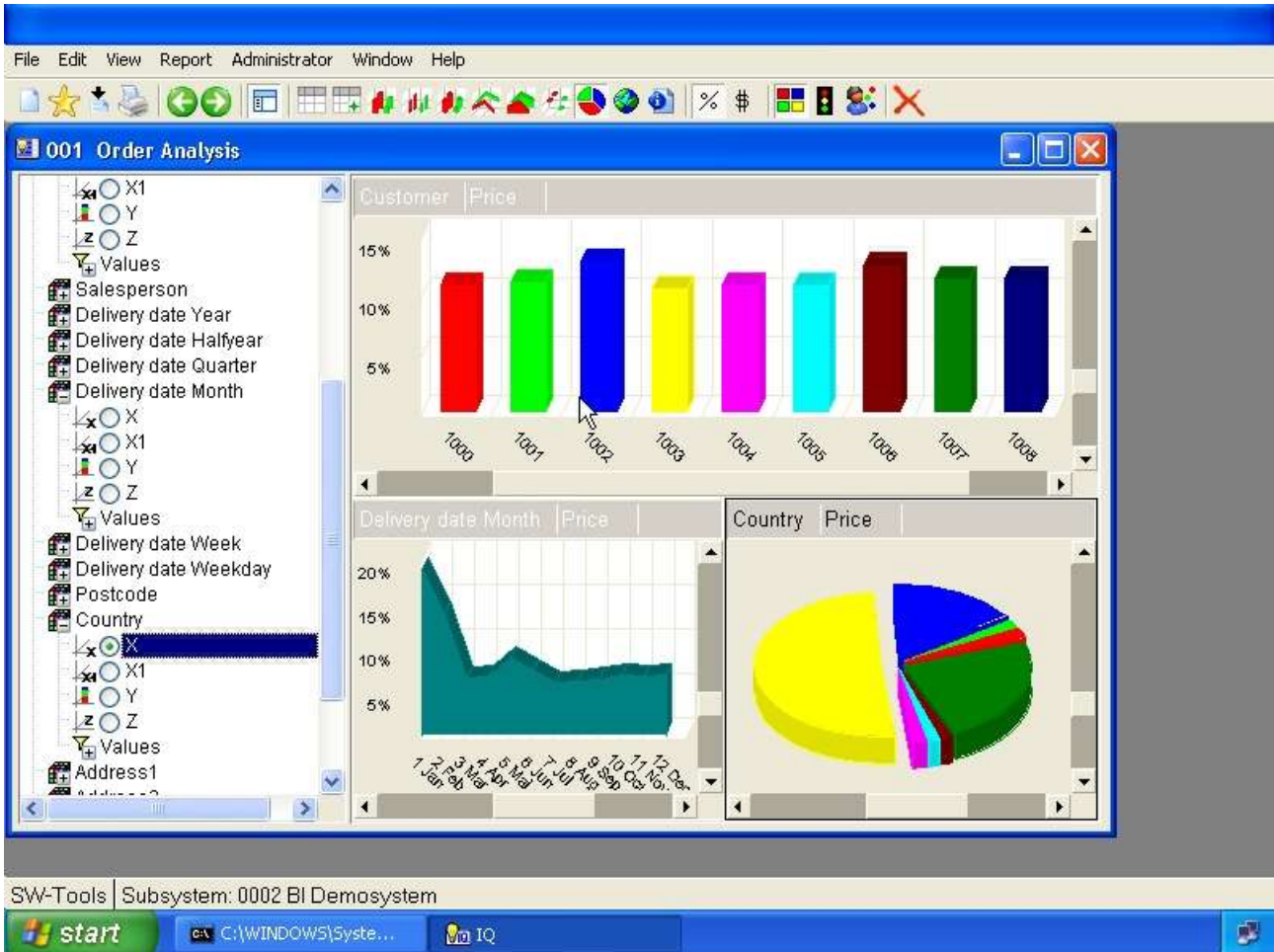
The values item under the dimension **Measures** allows you to select all measures or just those you want to compare.

Please refer to the chapter **Selections** for a description of how to make a selection.

## 16. Multiple interactive views

The concept of multiple views that can interact provides the analyst with a powerful way to drill into the data in the cube.

You are able to use the functions **New**, **Duplicate** and **Clear** in order to make multiple views. The number of views is limited to a maximum of 4.



### 48. Multiple views on one screen

As you can see the active view is displayed with a black border. To active another view just click once on the view. The controlpanel will only match the active view.

## **16.1. Duplicating a view**

Use the menu **Edit, Duplicate** to copy the current view into a new view.

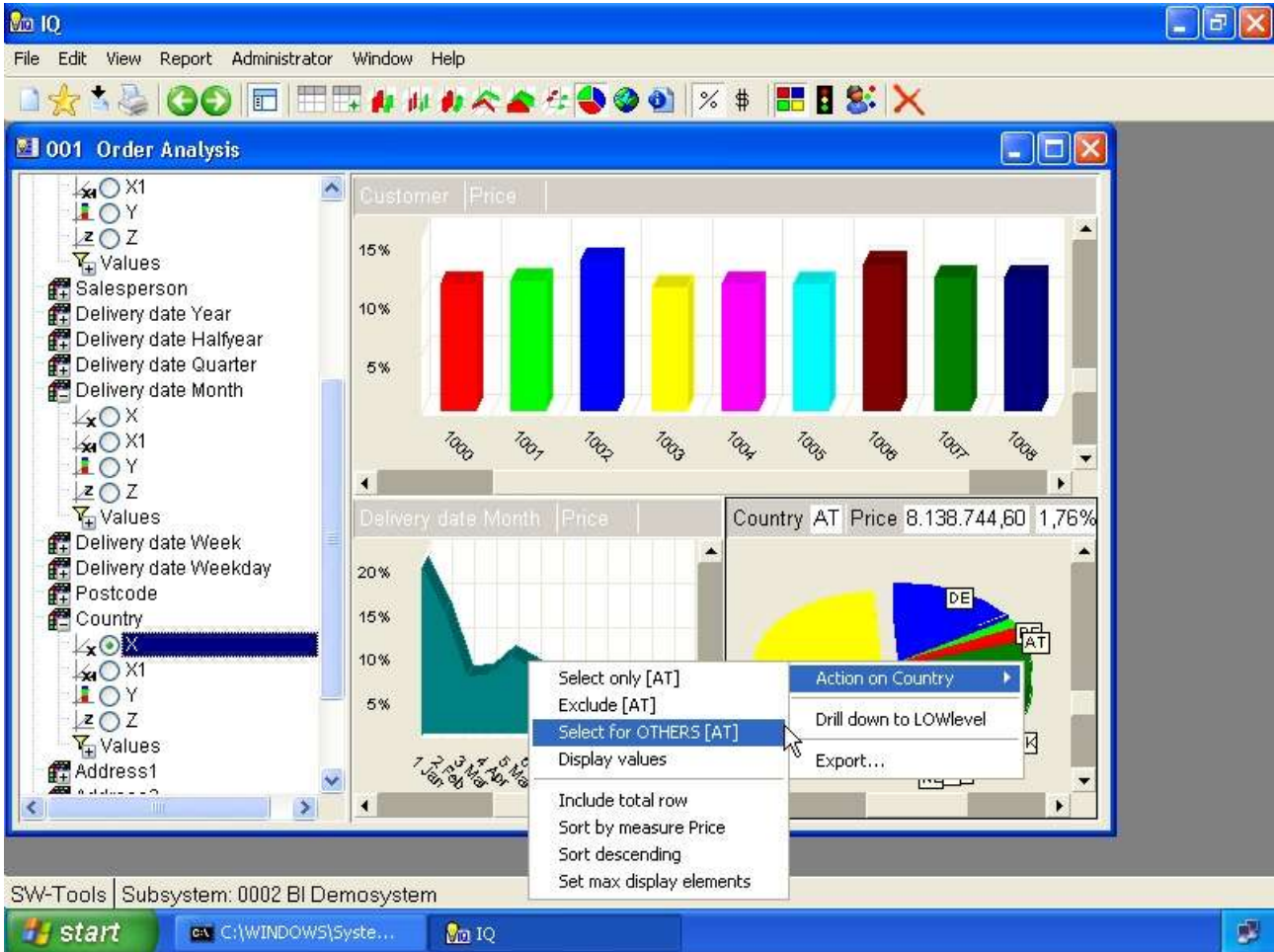


## **16.2. Inserting a new view**

Use the menu **File, New** to insert a new empty view.

### 16.3. Interaction between views

Interaction between views are done by means of selections. Not as described earlier but by clicking an item and select



#### 49. Global selection for other views

The selection made is not done for the current view but for all other views present. The active view will however show the chart item with a black border. You may select multiple values and from multiple views.

## 16.4. Rotating windows

Use the menu **Window, Rotate windows** to rotate the order of the views.

## 16.5. Deleting a view

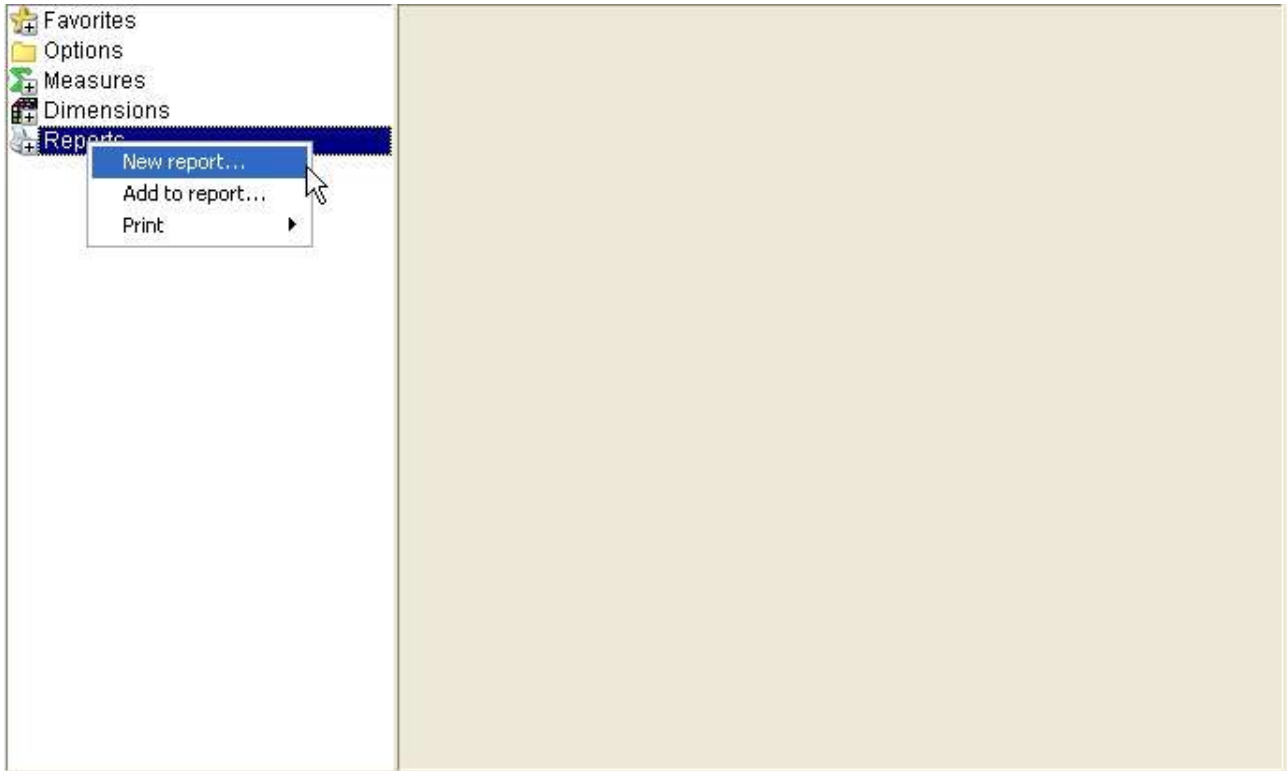
Use the menu **Edit, Delete** to delete the current view.

## **17. Reports**

The report section is an extension of the favorite section. Within the report section you may define subreports and within each subreport you may add views as you would add to favorites.

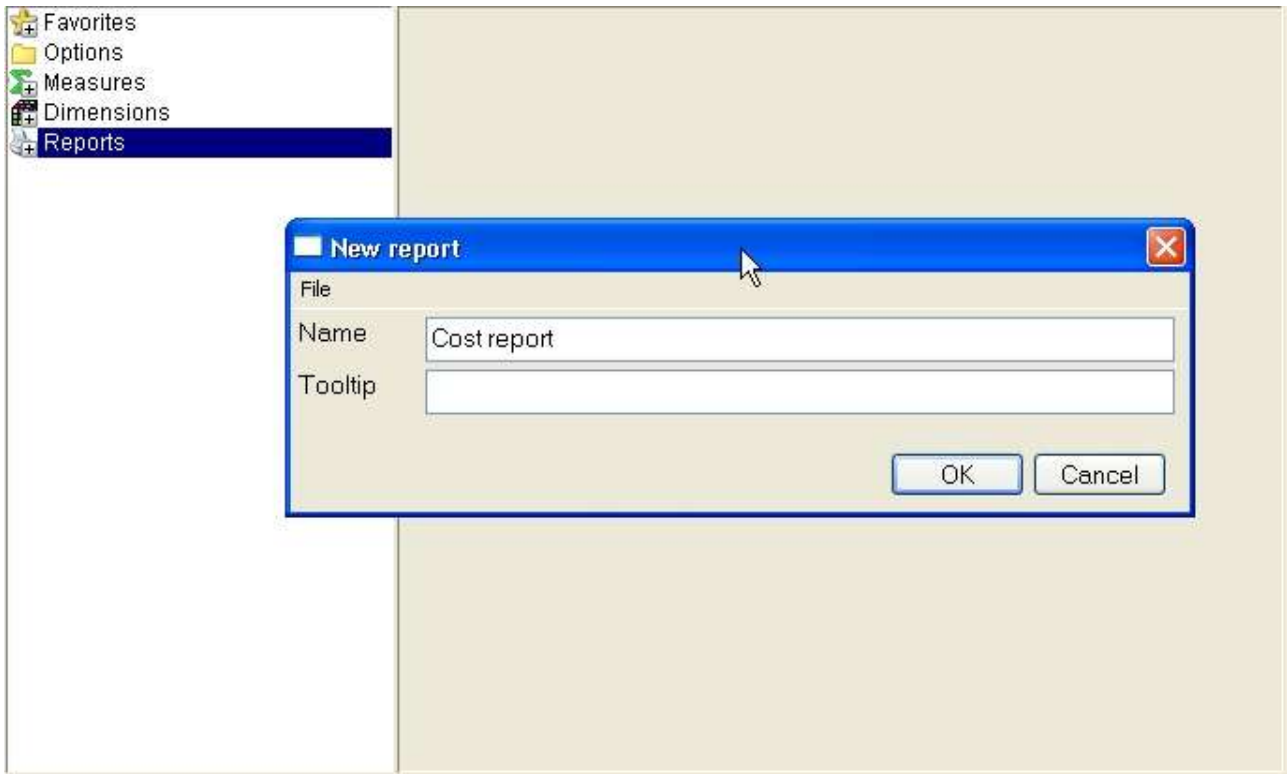
## 17.1. New report

In order to define a new report folder select



**50. New report menu**

In the dialog you may enter



**51. New report properties**

## 17.2. Add view to report

You do not need to create a new report in order to add a view to the report section. The report section must be understood as the main report where views may be added.

If you have created a report and want to add the current view to it, be sure that the report folder is selected before adding the view. If you fail to do so the view will be added to the main report section.

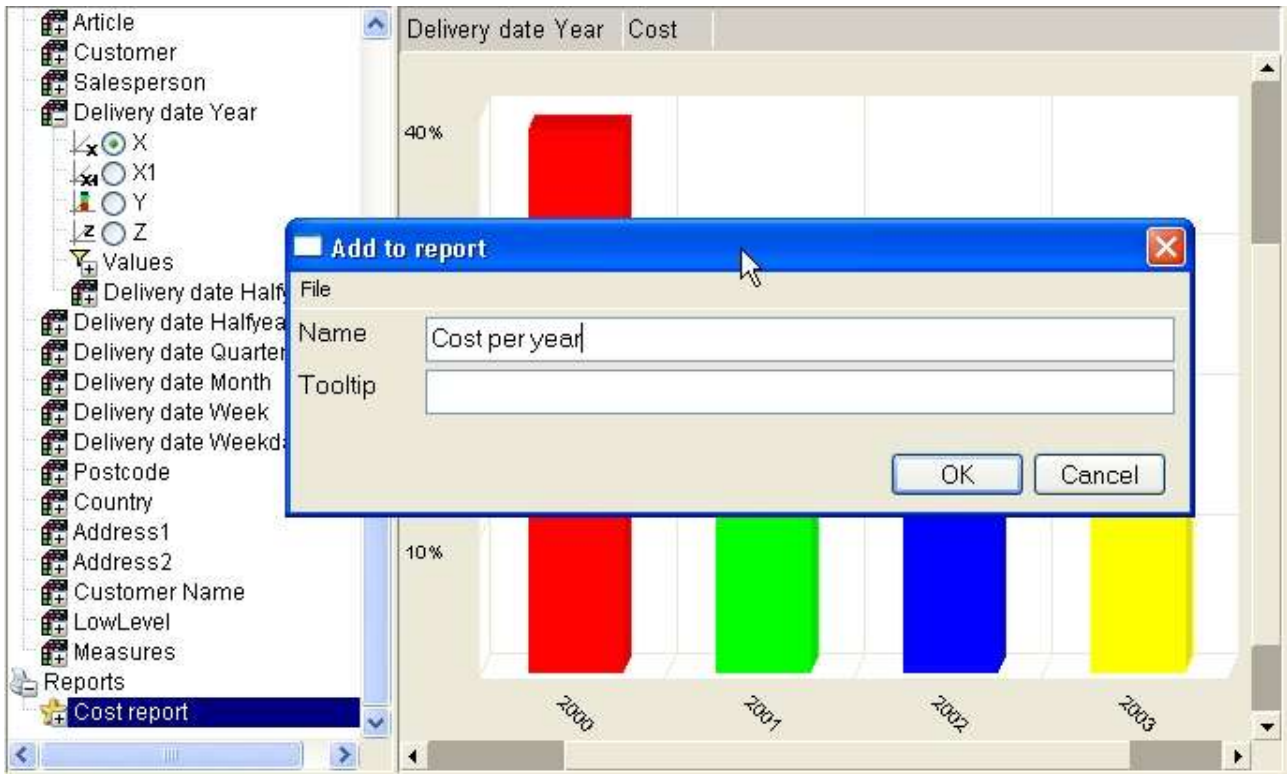
A foolproof way of adding a view to a specific report folder is to right click the report folder and select



**52. Add to report menu**

In the dialog you may enter





**53. Add to report properties**

## 17.3. Delete report

To delete a report or view you must right click the report folder or view and select the menuitem **Delete**.

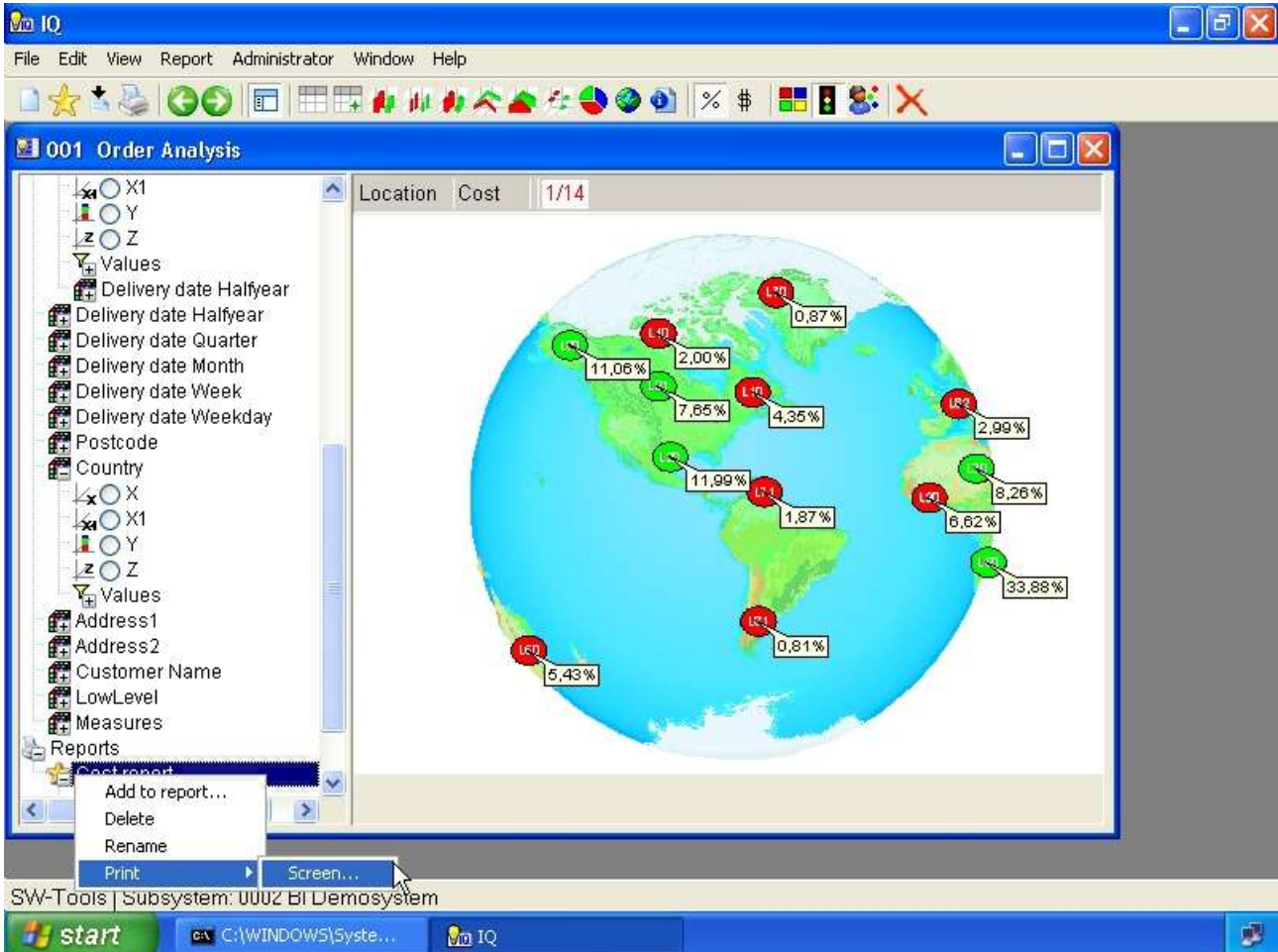
The delete function will ask for confirmation first. The deleting includes all subitems within the selected section.

## 17.4. Rename report

To rename a report or view you must right click the report folder or view and select the menuitem **Rename**.

## 17.5. Printing

When you need to print a report defined you must right click the report folder and select the menuitem **Print** and hereafter the printer.

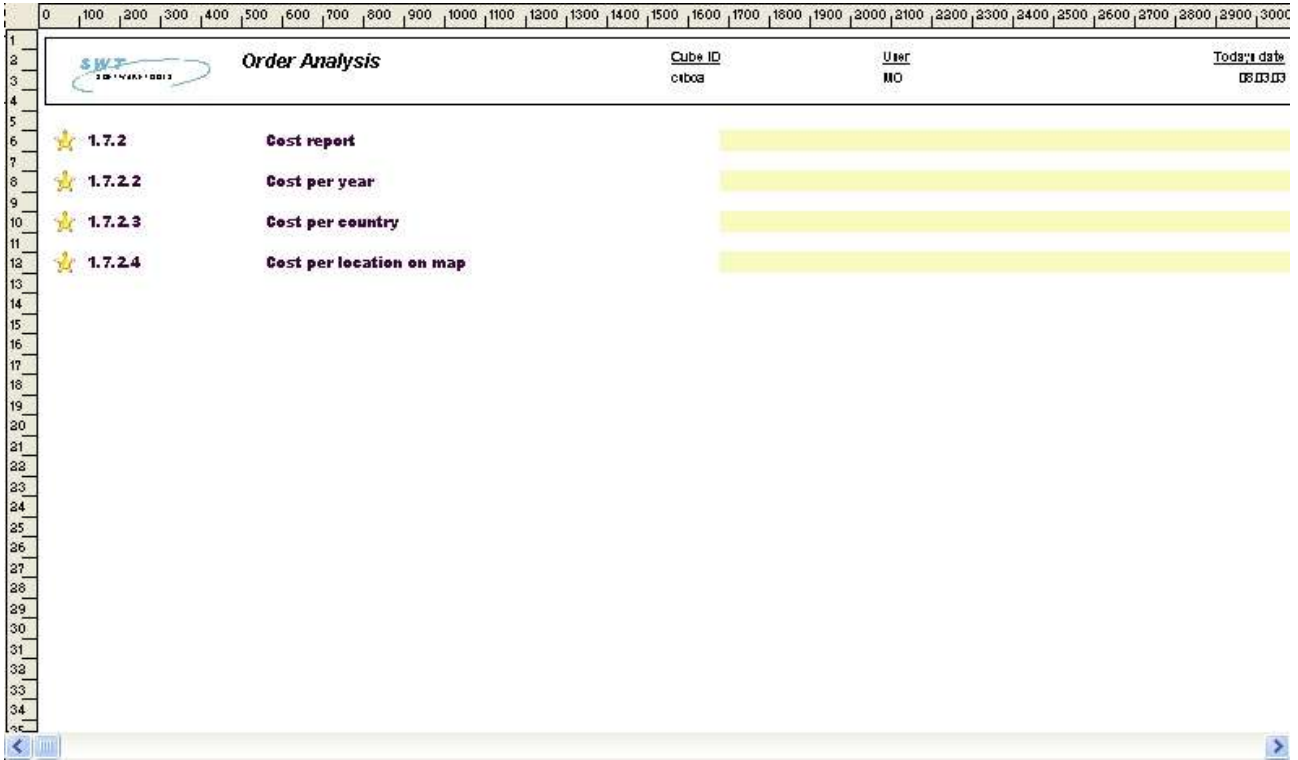


### 54. Print report menu

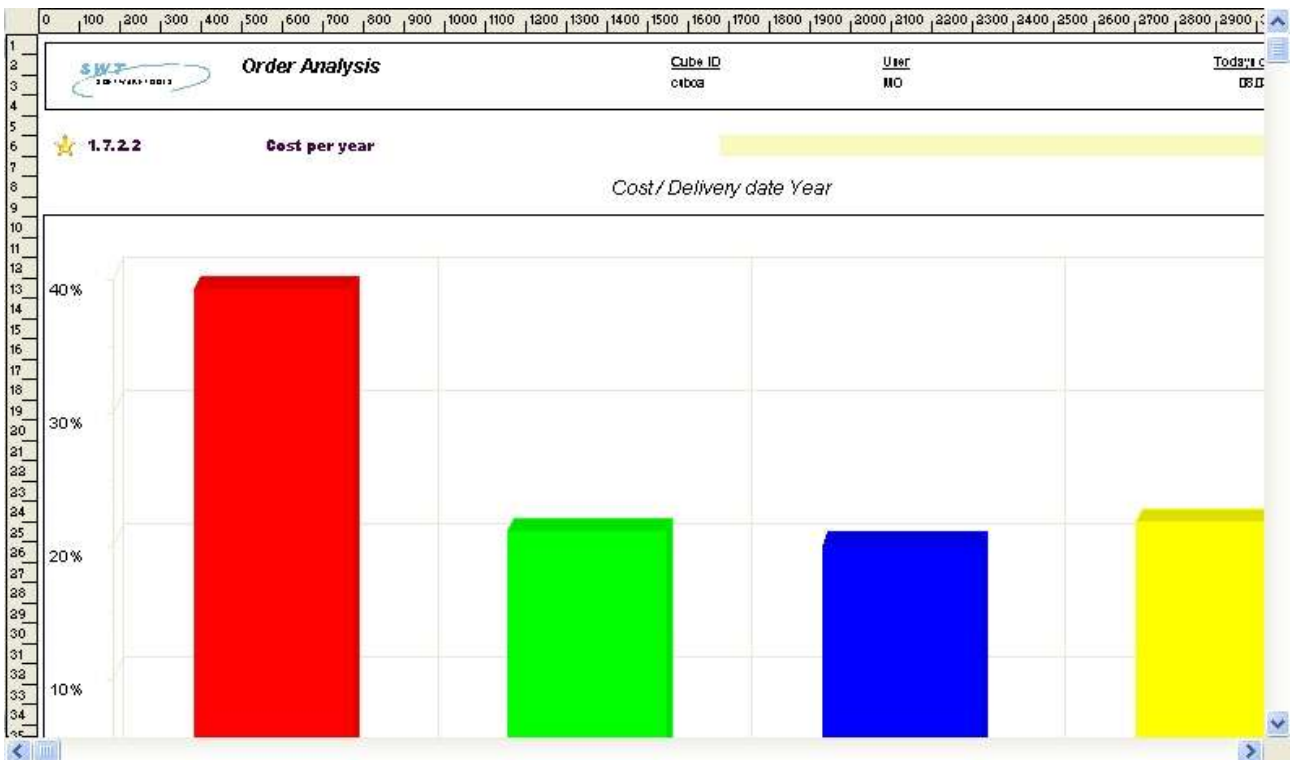
The selection of printer depends on the printers you have setup for TRIO.

If you want to print all reports, subreports etc. just right click the main report section as you would do on a report folder.

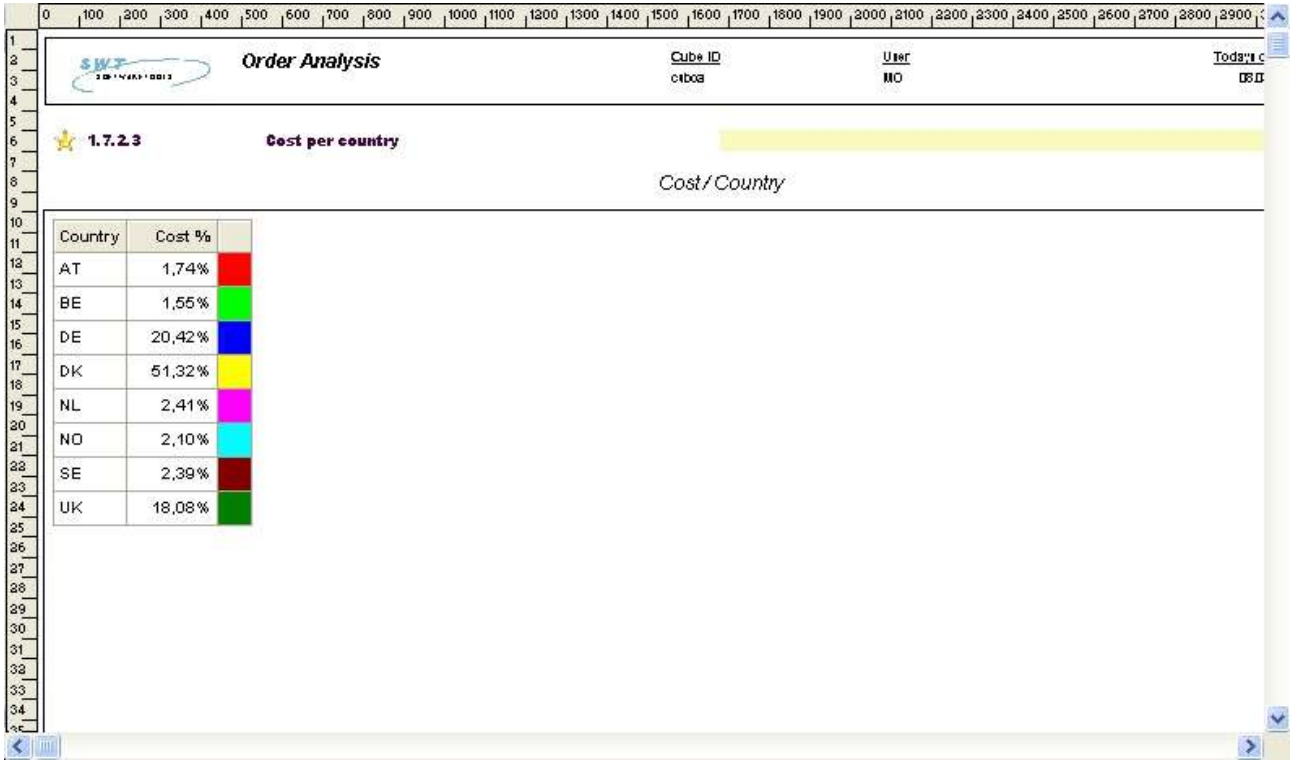
If you just want to print a view you may right click on the view as you would do on a report folder.



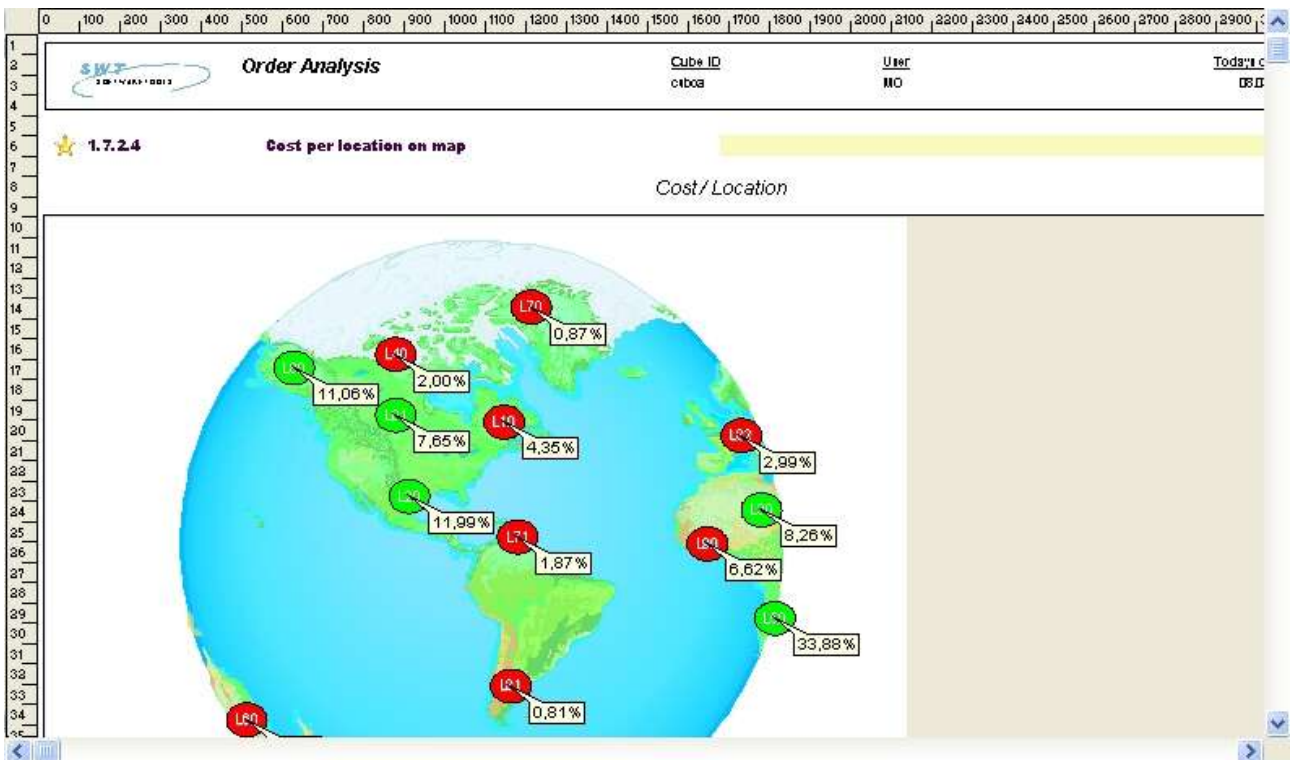
**55. Sample report content**



**56. Sample report chart**



**57. Sample report table**



**58. Sample report geomarketing**

## **18. Extend with IQ queries**

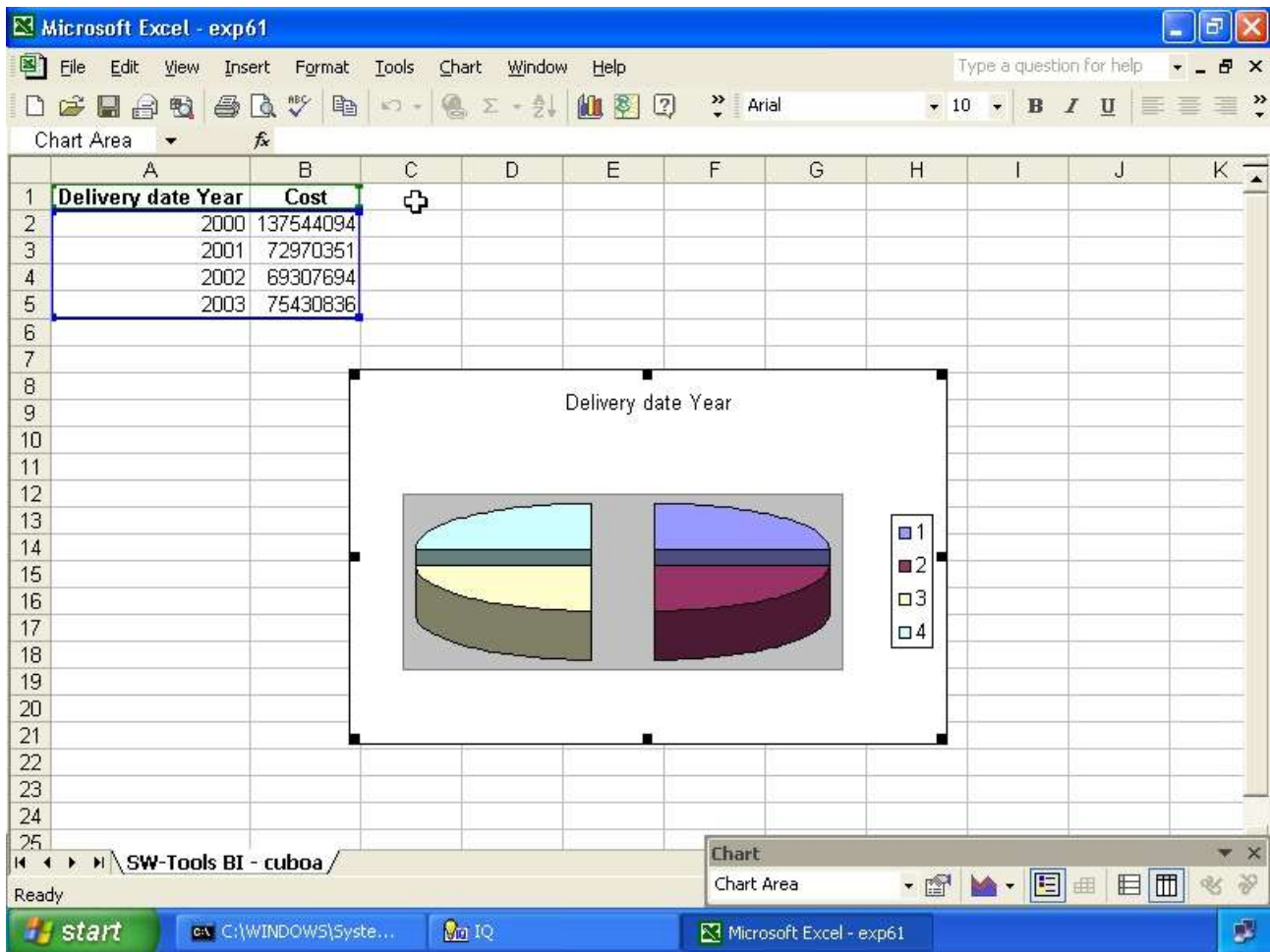
## **19. Export and Publish**



## **19.1. Export a view**

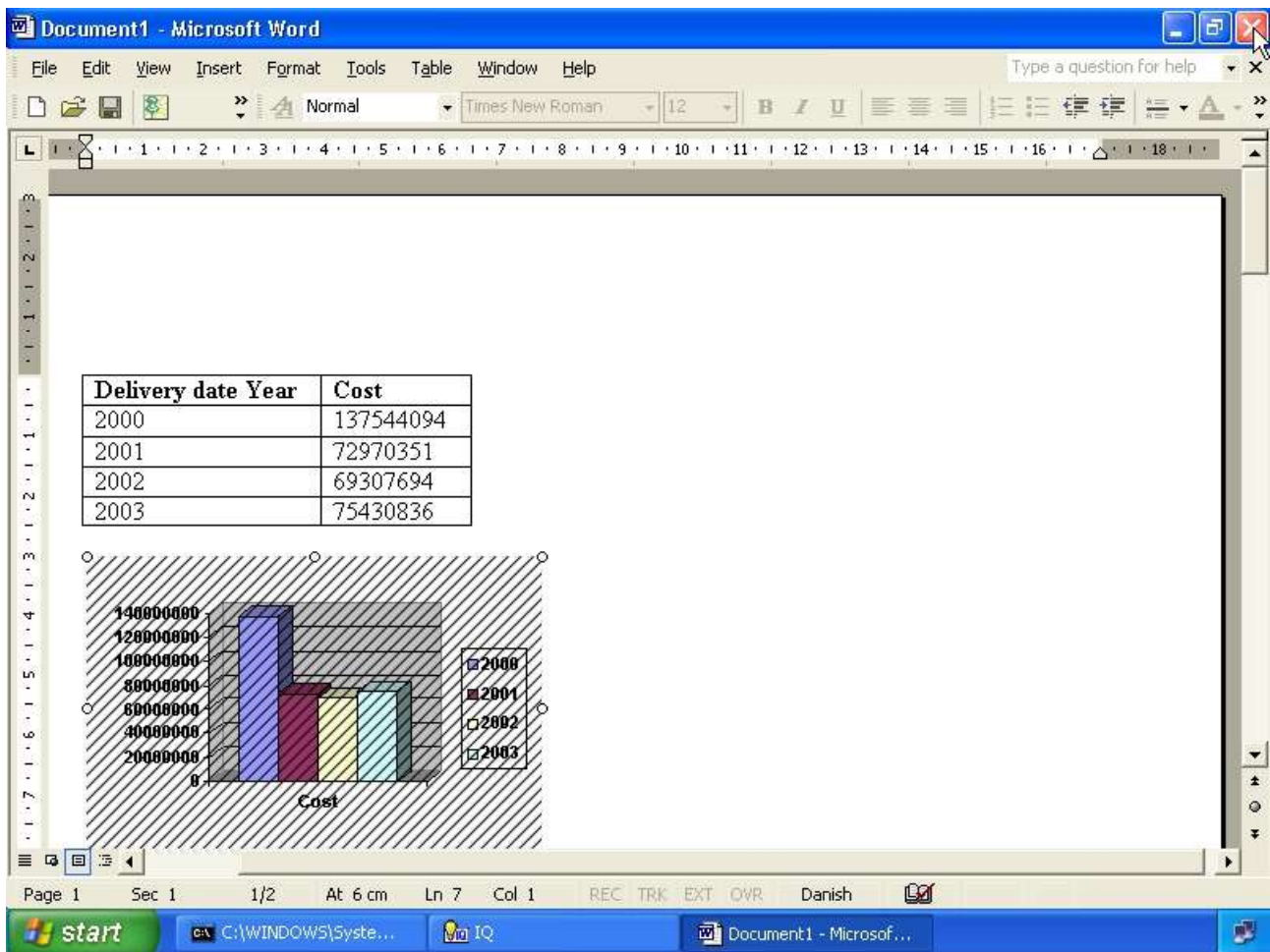
## **19.2. Predefined publishing to Microsoft Products**

## 19.2.1. Microsoft Excel



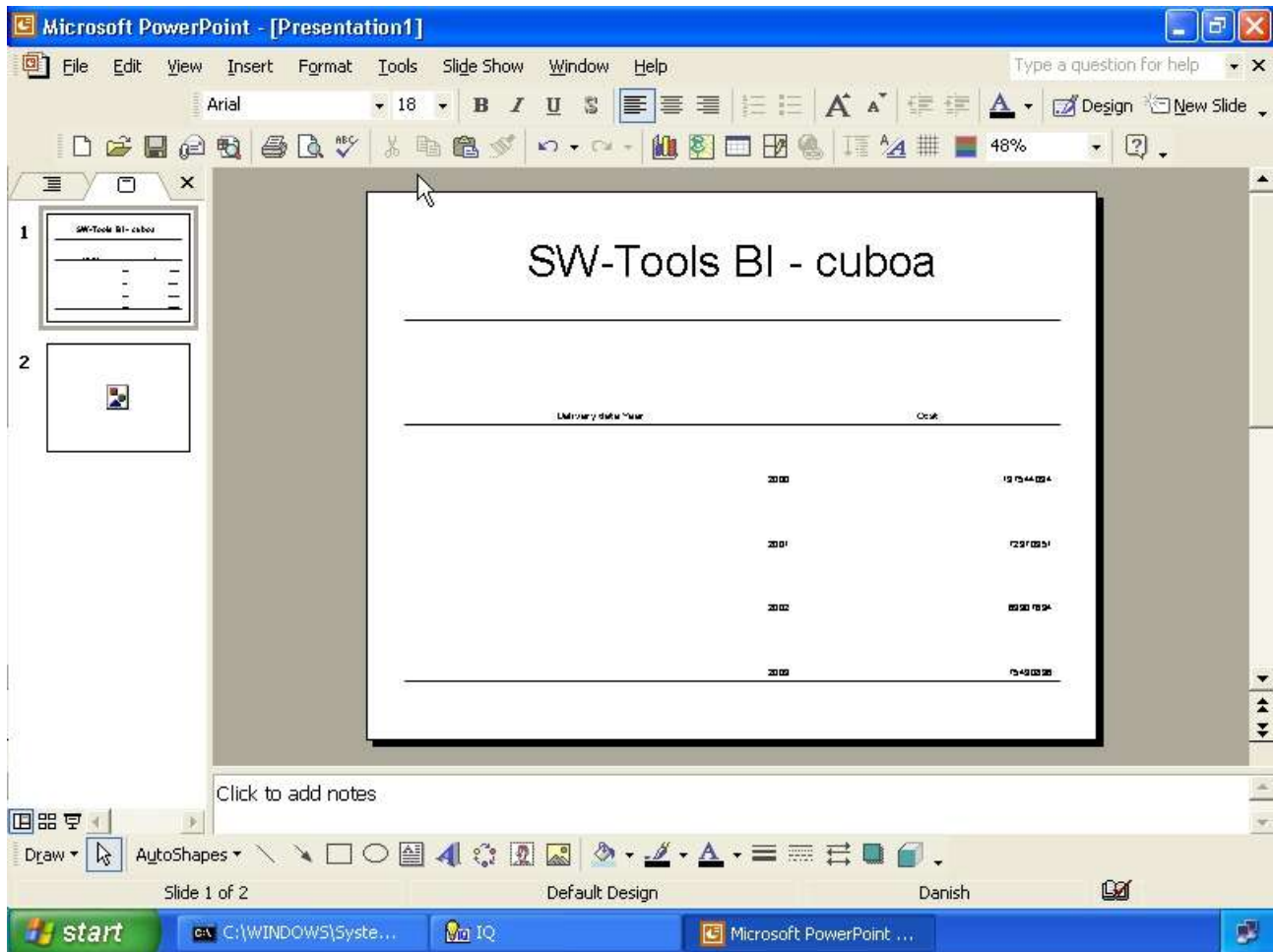
**59. Sample published to Excel**

## 19.2.2. Microsoft Word



**60. Sample published to Word**

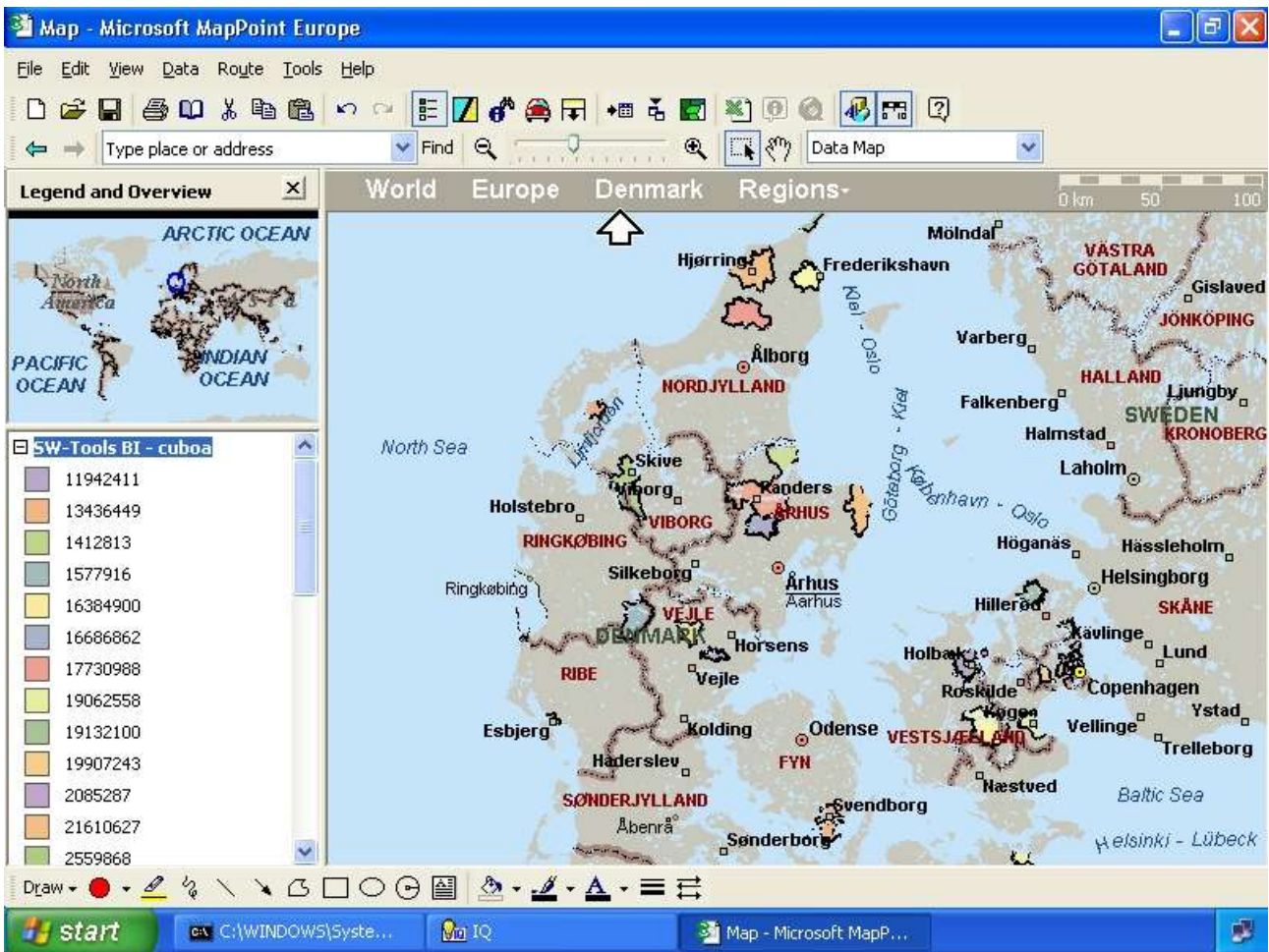
### 19.2.3. Microsoft PowerPoint



**61. Sample published to PowerPoint**

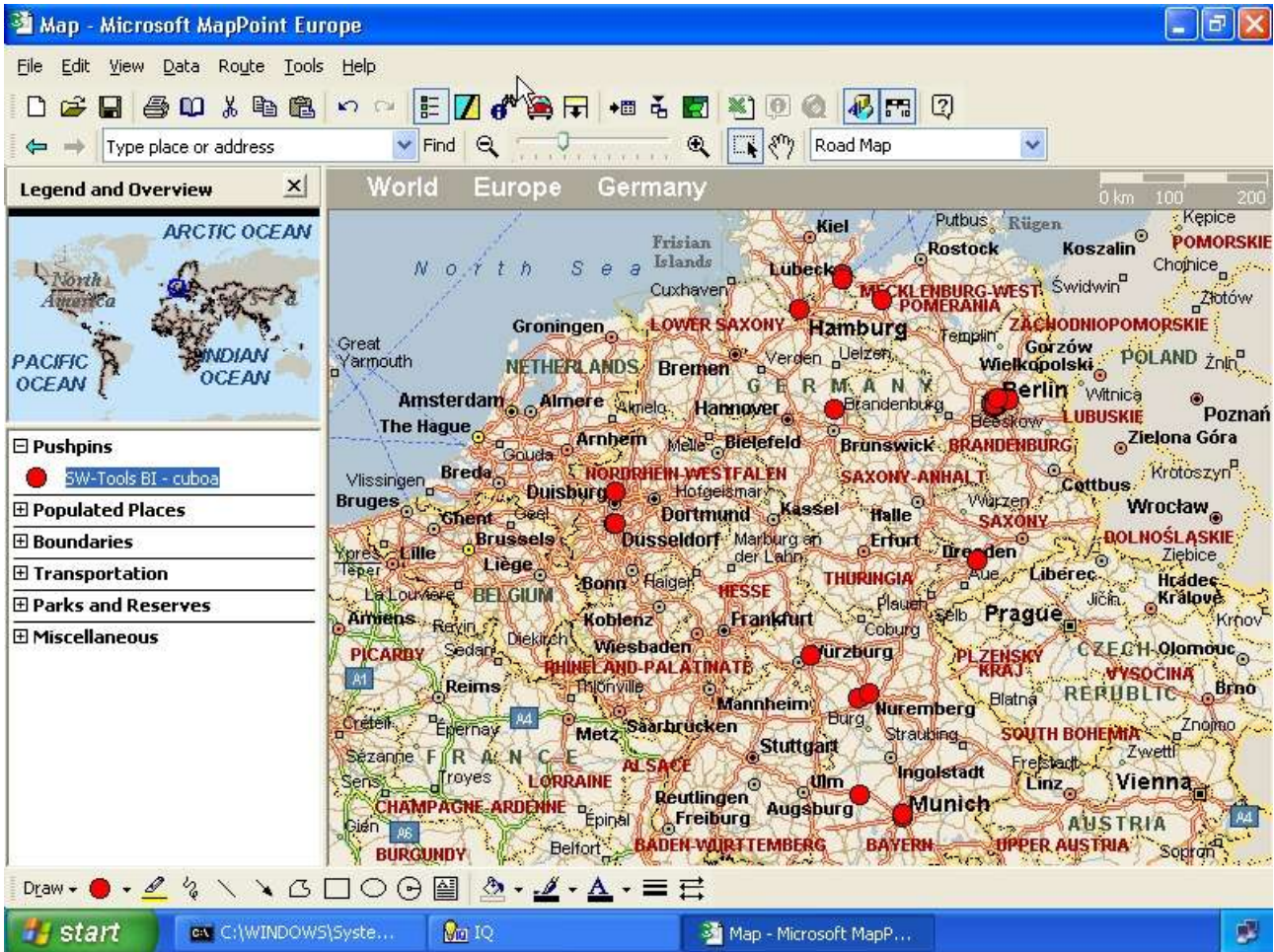
## **19.2.4. Microsoft MapPoint**

## 19.2.4.1. Postal information



**62. Sample published to MapPoint - Denmark Postalcodes**

## 19.2.4.2. Address information



**63. Sample published to MapPoint - Germany Addresses**



## **20. Keyboard control**

## 20.1. General keyboard settings

<b>Key</b>	<b>Description</b>
Delete	Clear all and close all levels in controlpanel
F2	Table view
F3	Bar chart view
F4	Thin bar chart view
F5	Cylinder chart view
F6	Line chart view
F7	Area chart view
F8	Point chart view
F9	Pie chart view
F11	Show/hide controlpanel
F12	Map selection

## 20.2. Ctrl keys

<b>Key</b>	<b>Description</b>
0	Rotate views
1	View percentage
2	View value
3	Include subtotals
4	Automatic color
5	Color according to average
6	Color according to calculation
7	Show/hide label id
8	Show/hide label value
9	Show/hide label percentage
W	New view
S	Add to favorites
P	Hardcopy
C	Duplicate current view
X	Delete current view
F1	Information view

## 20.3. Shift+Ctrl keys

<b>Key</b>	<b>Description</b>
B	Back in history
F	Forward in history
1	Pivot table X as column
2	Pivot table X1 as column
3	Pivot table Y as column
4	Pivot table Z as column

## 20.4. Special for map view

<b>Key</b>	<b>Description</b>
+	Zoom in
-	Zoom out
*	Zoom all

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