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Welcome to DecisionKey

Welcome

DecisionKey® is our suite of delivery and analysis tools that allows you to access and analyze NPD data anywhere via the Web, allowing you to:

- Process large quantities of information
- Create routine reports or mine data in depth
- Collaborate and share reports
- And more

DecisionKey requires no installation or downloading of databases. Use the Menu at the left in the Help system or this user guide to learn more about what DecisionKey can do for you.

What’s New in DecisionKey describes the latest DecisionKey features. This link is found within the left navigation panel under Help & Training, What’s New.
This page intentionally left blank.
System Requirements

DecisionKey Desktop

Windows

DecisionKey minimum requirements for Windows are:

- **Processor**: 1 GHz or higher
- **Operating System**: Windows 7, or higher
- **Memory**: 2 GB or higher
- **Screen Resolution**: 1280x768 or higher
- **Browsers**:
  - Internet Explorer 11
  - Firefox 52.4.1 or higher *
  - Google Chrome 62.0.3202 or higher
  - Microsoft Edge

*NOTE: If you are experiencing timeout issues when using Firefox, you can increase the time before a timeout message displays.

To increase the time before a timeout message displays:

1. Launch Firefox and enter `about:config` in the browser's address bar.
2. Press the Enter key to view a Firefox warning page.
   
   **NOTE**: This page points out the changes you make on the Settings page can be harmful if you do not know what you are doing.

3. Choose the I'll Be Careful, I Promise button to view the settings page.
   
   **NOTE**: This page consists of a table containing preferences.

4. Enter `dom.max_script_run_time` into the page's Search text box.

5. When Firefox locates that preference, double-click the number that appears in the table's "Value" column and type a new value in the text box that appears.
   
   **NOTE**: The default value is 10. With that value, Firefox waits 10 seconds before displaying a timeout message. Enter a larger number to increase the delay time. (try 3600 seconds).

6. Choose the OK button.

- The supported Microsoft Office products are: Office 2010, 2013, 2016
**Macintosh**

DecisionKey minimum requirements for Macintosh are:

- **Processor:** 1 GHz or higher
- **Operating System:** Mac OS X v10.10
- **Memory:** 2 GB or higher
- **Screen Resolution:** 1280x768 or higher
- **Browsers:**
  - Firefox 52.4.1 or higher
  - Safari 11 or higher
  - Google Chrome 62.0.3202 or higher
- The supported Microsoft Office product is: **Office for MAC 2016**

**Dashboard Mobile**

The following devices are supported:

- Apple iOS 10 or higher
- Android 6 or higher

**NOTE** Some devices may not be supported due to a specific carrier or device.
Starting DecisionKey

Logging In or Logging Off

Starting the Application

Navigate to the DecisionKey web page from the Login link on NPD.com. The login box will be displayed.

If you ever forget your username, click the Click here link for a hint.

If you ever forget your password, click the Reset Password link (after you click Next) and enter the requested information in the Reset password window. We will then send you an email with a temporary password that you can use to log in to your account.

Logging In

1. Enter your username and click Next.

   The Password window opens.
2. Enter your password then choose the **Sign In** button.  

   Or  

3. Press the **Enter** key.

   ✶ The first time you log in, you will be prompted to change your password. Enter the temporary password emailed to you and then create a new password.

At your first login, you select a data source. Then, depending on the preferences you have set, you may see either the last data source you had open, the Data Source List where you select the data source, or a specific data source each time you log in. (See Also: **Selecting a Data Source**)

**Change Password on Login**

This feature allows you to change your password when logging in to DecisionKey without requiring an email reset.

1. Enter your username and click **Next**.
2. Enter your password.
3. Click on the **Change password after login** checkbox to select it.
4. Choose the **Sign In** button or press the **Enter** key.

   The **Change password** window opens.
5. Enter your current password in the "Current password" field.

6. Enter a new password in the "New password" field.

   - **Password Guidelines:**
     - must be at least 8 characters in length
     - must include at least one upper-case English letter (A-Z)
     - must include at least one lower-case English letter (a-z)
     - must include at least one numeral (0-9)
     - must not include your name or username
     - must not reuse any of your last four passwords

   **Example:** The Password “Expert77” contains eight characters and includes one upper-case letter, five lower-case letters, and two numerals.

7. Re-enter your new password in the "Confirm new password" field.

8. Choose the **Save** button.

   Use your new password the next time you log in to DecisionKey.

   - You can only change your password one time within a 24-hour period.
   - Use the Reset password feature if you are locked out or have forgotten your password. You can reset your password using Reset password as often as necessary.
Logging Off

Choose **Log Off** in the left navigation panel.

- Click on the **npd** logo to open the NPD.com webpage.

Using Security Keys

Some NPD accounts require the entry of a Security Key at login. A **security key** is entered after your username and password to verify your identity. Security keys are assigned to you by the system and are sent to you via email.

If you are asked for a security key after you enter your username and password, you will need to request and use a key in order to access your data. If you are not asked for a key, your account does not require it.

To use a security key:

1. Enter your username and password as usual. If you see the Security Key dialog box, click the **Request Key** link at the middle right.

2. Check your email. When you receive the security key from NPD, copy and paste it into the **Security Key** field and choose the **Continue** button.

   - Be careful to enter the key just as you received it. If you enter the wrong key, you will need to log in with your username and password again and then enter the correct key or request a new one.

   If you do not have your key or it has expired, just click the **Request Key** link to get a new key. You can request a new key as often as you wish.
You will need to use this security key each time you log in for 5 days. After 5 days, the key expires, and you need to again choose the Request Key link to get a new key.

## Selecting a Data Source

You are granted access to various data sources based on your department. (See Also: Logging In or Logging Off)

### Opening a Data Source When You Log In

The first time you log into DecisionKey, open a data source from the Data Source List that will be displayed on the screen. You will see only the data sources to which you have access.

- You can view the data sources as a grid by choosing the Show as Grid button.

1. Double click the data source that you wish to open.

   Or

   Highlight the data source and choose the Select button.

   The data source name will appear in the Title Bar, along with a notation on the range of dates for which data is available.

2. Depending on the preferences you have set, when you log in again you may view:

   - The last data source you had open.
   - The Data Source List where you select the data source.

   Or

   - A specific data source each time you log in.

(See Also: Setting Preferences)

### Changing the Data Source

The Title Bar shows the current data source.

To change the data source:

- Select the data source from the drop-down list in the Current Data Source text box.

Any report you have open will be cleared and the Library tab will be displayed for the new data source.

- Enter the first few letters of the data source to jump to the first matching entry.

  Or

  - Click on the DecisionKey logo to return to the list of data sources you have access to in Report Builder.
Getting Help with the Application

Getting Help

Help is available through Help & Training in the left navigation panel. You can also access training materials from this option.

Using the Help System

Using the Tabs

To get help with the application:

1. Choose Help & Training in the left navigation panel and select Contents.
   
   The help system will be displayed.

2. Choose one of the tabs.

   ✴ If the Menu/Index pane is closed, the tabs display across the top of the help screen. Click a tab to restore the pane.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu</td>
<td>Browse topics in help. Click on a book or a page to view the topic.</td>
</tr>
<tr>
<td>Index</td>
<td>Scroll to find topics by index keywords. Click on the index entry.</td>
</tr>
<tr>
<td></td>
<td>- If only one topic is associated with that entry, it will be displayed.</td>
</tr>
<tr>
<td></td>
<td>- If more than one topic is associated with the index entry, select from the popup list.</td>
</tr>
<tr>
<td></td>
<td>You can also enter the keyword in the text box to find an index entry. If the entry is found, the topic will be displayed. If there are several topics associated with the keyword, a popup menu will be displayed.</td>
</tr>
<tr>
<td>Search</td>
<td>Search the full text of the Help for a word or phrase. The search results show the word or phrase in context.</td>
</tr>
<tr>
<td></td>
<td>- Click Title to sort the results by title.</td>
</tr>
<tr>
<td></td>
<td>- Click Rank to sort by relevance.</td>
</tr>
<tr>
<td></td>
<td>- Click on a result to display the topic.</td>
</tr>
<tr>
<td></td>
<td>If you choose the Highlight Search Results checkbox before searching, the words will be highlighted in the topic.</td>
</tr>
<tr>
<td>Glossary</td>
<td>View a list of glossary terms. Select a term to view the definition.</td>
</tr>
</tbody>
</table>
Browsing

Click the right or left browse arrows in the Menu/Index pane to move forward and back through the topics in a book.

Printing a Help Topic

- Right click and choose Print from the context menu to print the help topic.
Screens and Components

Tabs, Toolbars, Components

This section gives basic information on the principal web page tabs, screen components, and toolbars.

Basic Navigation

Navigation in DecisionKey is simple.

- Click a tab label to switch to that tab. The other tabs remain available for selection, so you can switch from designing the report to viewing the results of your report choices.
- Close a tab by clicking the X in the tab label.
- Use the toolbars on the screens to execute commands. When you hover the mouse pointer over a button, you can read a description of its function.
- Use the Refresh in the toolbars to refresh the data.

Components

The table below is a reference to help you identify the functions of various DecisionKey components.

Select a link below to view an image of the screen element. Choose a link from the Help Menu pane at the left to read more about these screens and tools.

<table>
<thead>
<tr>
<th>Tab / Screen Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Reports</td>
<td>Work with all saved reports.</td>
</tr>
<tr>
<td>Builder Tab</td>
<td>Allows you to create and run reports.</td>
</tr>
<tr>
<td>Data Source List</td>
<td>List of possible data sources. Open or change a data source here.</td>
</tr>
<tr>
<td>File Center</td>
<td>See status of Batch reports and download completed files.</td>
</tr>
<tr>
<td></td>
<td>Open general information files in the File Repository.</td>
</tr>
<tr>
<td>Library Tab</td>
<td>The main tab of the application.</td>
</tr>
<tr>
<td>My Reports</td>
<td>List of reports that you have created.</td>
</tr>
<tr>
<td>Notification Center</td>
<td>Area on the Builder tab that alerts you to steps you need to take to create a report and changes you must make before the report can be run.</td>
</tr>
<tr>
<td>Recent Reports</td>
<td>List of reports you have recently run. These are reports you created and ran and other users’ reports that you ran as well.</td>
</tr>
<tr>
<td>Tab / Screen Area</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Report Options</td>
<td>Make choices of filters, layout, and measures for your report. This is a step-by-step guide to building a report.</td>
</tr>
<tr>
<td>Report Selections</td>
<td>View the choices you have made for your report. Click a link to jump to that choice to modify it.</td>
</tr>
<tr>
<td>Title Bar</td>
<td>Area at the top of the screen that identifies the data source currently open, and for what period data is available.</td>
</tr>
<tr>
<td>Toolbars</td>
<td>Sets of tools that execute commands. Toolbars are different in different parts of the application. (See Also: Toolbars)</td>
</tr>
<tr>
<td>Viewer Tab</td>
<td>Allows you to view a report layout.</td>
</tr>
<tr>
<td>Workspace</td>
<td>When you select a filter, layout, or measure in Report Options, refine your choices in the Workspace.</td>
</tr>
</tbody>
</table>

**Title Bar**

The Title Bar at the top of the DecisionKey screen tells you what *data source* is currently open and for what period data is available.

- Use the drop-down list in the **Current Data Source** box to change data sources. (Enter the first few letters of the data source to jump to the first matching entry.)
DecisionKey User Guide

Toolbars

Toolbars include buttons that allow you to quickly access commonly used options. The tables below show and explain the buttons.

- Some components listed here may not be available to you because you do not have access to that component.
- Buttons that are not available to you are grayed out on the toolbars.
- If not all buttons are visible, click ▼.

Left Navigation Panel

These tools are available in the left navigation panel. Tools that are grayed out or don't appear (i.e. Pro) are for functions to which you do not have access:

<table>
<thead>
<tr>
<th>Tool</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pro</td>
<td>Start a new report; the Builder tab will open.</td>
</tr>
<tr>
<td>Setup</td>
<td>Work with clusters or custom groupings. (Pro users only) A cluster is a new field created by selecting values from one field in the data source. A custom grouping is a new field the can include choices from more than one field. Use the Preferences option to change your preferences for the viewer, data source, reports builder, and number format.</td>
</tr>
</tbody>
</table>
### Tool

<table>
<thead>
<tr>
<th>Tool</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Center</td>
<td>Open the File Center tab. (See Also: <a href="#">File Center</a>)</td>
</tr>
<tr>
<td>Help &amp; Training</td>
<td>Open online help or training materials or view the About information.</td>
</tr>
</tbody>
</table>

### My Reports

These buttons are available:

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Open the report to make changes to it.</td>
</tr>
<tr>
<td>Run</td>
<td>Run the selected report.</td>
</tr>
<tr>
<td>Rename</td>
<td>Rename a report.</td>
</tr>
<tr>
<td></td>
<td>1. Select a report and choose the Rename button.</td>
</tr>
<tr>
<td></td>
<td>2. Enter a new name for the report in the text box.</td>
</tr>
<tr>
<td></td>
<td>3. Choose the Rename button.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete a folder.</td>
</tr>
<tr>
<td>Batch</td>
<td>Open the Batch dialog box.</td>
</tr>
<tr>
<td>Remove from Queue</td>
<td>Remove a Batched report from the queue so it will not run as a batch.</td>
</tr>
</tbody>
</table>

### Recent Reports

These buttons are available:

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Open the report to make changes to it.</td>
</tr>
</tbody>
</table>
Button | Use
--- | ---
Run | Run the selected report.

**All Reports**

These buttons are available:

* If all the buttons are not displayed, click the double arrow at the right. You can refresh the view with the button in the title bar.

**Folder Toolbar:**

**Report Toolbar:**

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Folder</td>
<td>Create a new folder.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete a folder.</td>
</tr>
<tr>
<td>Expand All</td>
<td>Expand all the folder trees.</td>
</tr>
<tr>
<td>Collapse All</td>
<td>Collapse all the folder trees.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Open a saved report so you can make changes and rerun it.</td>
</tr>
<tr>
<td>Run</td>
<td>Run the selected report. It will display on the Viewer tab. (If you want to make changes in the Builder first, choose the Edit button.)</td>
</tr>
<tr>
<td>Cut</td>
<td>Cut a report so as to move it to a different folder.</td>
</tr>
<tr>
<td>1. Select a report and choose the Cut button.</td>
<td></td>
</tr>
<tr>
<td>2. Highlight a folder and choose the Paste button to move the report to that folder.</td>
<td></td>
</tr>
</tbody>
</table>
## Screens and Components

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
</table>
| ![Copy] | Copy a saved report.  
1. Select a report and choose the Copy button.  
2. Highlight a folder and choose the Paste button. A copy of the report will be placed in the folder. |
| ![Paste] | Move or copy report to selected folder. |
| ![Reproduce] | Copy reports from one data source to another, where applicable, by using the Reproduce button. |
| ![Rename] | Rename a report.  
1. Select a report and choose the Rename button.  
2. Enter a new name for the report in the text box.  
3. Choose the Rename button. |
| ![Delete] | Delete a report. |
| ![Batch] | Open the Batch dialog box. |
| ![Remove from Queue] | Remove a Batched report from the queue, as long as the status says Pending..., Pending On New Data Load or Running, so it will not run as a batch. |

### Standard Templates

These buttons are available:

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Expand All]</td>
<td>Expand or collapse the tree.</td>
</tr>
<tr>
<td>![Collapse All]</td>
<td></td>
</tr>
<tr>
<td>![Refresh]</td>
<td>Update the list.</td>
</tr>
<tr>
<td>![Edit]</td>
<td>Open the report to make changes to it.</td>
</tr>
</tbody>
</table>
### Button

<table>
<thead>
<tr>
<th>Tool/Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run</td>
<td>Run the selected report.</td>
</tr>
</tbody>
</table>

### Workspace

These tools and buttons are available in the Workspace on the Builder tab:

<table>
<thead>
<tr>
<th>Tool/Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Search for matching items. When you have entered two characters, matching results will begin to display. Select from the results. Use the * wildcard in searches. s* displays results beginning with &quot;s.&quot; *sys displays results containing these characters. The magnifying glass tool can be used to display matching results. The X tool clears the search box.</td>
</tr>
<tr>
<td>Refresh</td>
<td>Refresh the display. Use to restore all the items after doing a search.</td>
</tr>
<tr>
<td>Page 1 of 9</td>
<td>When you select a field in filters, layout, or measures, the selections for this field display in the Workspace. When more than one page of results is displayed, you can navigate through the pages. Click the drop-down arrow and move the slider to move through the report. You can also change the number of rows in the display.</td>
</tr>
<tr>
<td>View: Item</td>
<td>Switch from viewing individual items to viewing cluster sets.</td>
</tr>
<tr>
<td>Cluster Setup...</td>
<td>Set up cluster sets and clusters. (See Also: Working with Clusters and Cluster Sets)</td>
</tr>
<tr>
<td>1 - 5 of 5</td>
<td>Display indicating how many choices there are.</td>
</tr>
</tbody>
</table>
**Builder**

These buttons are available on the Builder tab at the lower right:

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Preview" /></td>
<td>Preview the report layout before running it.</td>
</tr>
<tr>
<td><img src="image" alt="Batch" /></td>
<td>Open the Batch dialog box where you can set options for NPD to run the report and deliver it to you as a file in File Center. This button is grayed until you save the report.</td>
</tr>
<tr>
<td><img src="image" alt="Run" /></td>
<td>Run a report.</td>
</tr>
<tr>
<td><img src="image" alt="Save As" /></td>
<td>Save the report with a new name and optionally in a different folder.</td>
</tr>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Save the report.</td>
</tr>
</tbody>
</table>

**Viewer**

These tools appear on the Viewer tab:

<table>
<thead>
<tr>
<th>Tool</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Navigation" /></td>
<td>Navigate through the pages of the report.</td>
</tr>
</tbody>
</table>
| ![Appearance](image) | - Change the rows per page  
- Put totals at the top, bottom, or turn them off  
- Freeze rows  
- Show a page number footer in the report |
| ![Settings](image) | - Show report information  
- Turn Top N on (by number of items to display or percent of total number of items to display) (Use Clear in the dialog box to remove Top N.)  
- Turn on share of row  
- Turn on percent/point change  
- View a list of measures and change the orientation of the data from rows to columns or to the page by filter area (See Also: Using the Fields List) |
<table>
<thead>
<tr>
<th>Tool</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export</td>
<td>Export the data in PDF, formatted Excel, unformatted Excel, or CSV format. You have the option to export separate pages for each of the Page By fields.</td>
</tr>
<tr>
<td>NOTE:</td>
<td>You can only export to CSV format if your subscription includes this feature.</td>
</tr>
<tr>
<td>Print</td>
<td>Print the report or preview the printout.</td>
</tr>
<tr>
<td>Update Selections</td>
<td>Click <strong>Update Selections</strong> to add your Viewer format changes, including Top N to Builder.</td>
</tr>
</tbody>
</table>

**File Center**

These buttons are available in the File Center:

- **Download**
  - Download a file.
- **Delete**
  - Delete a file.
- **Remove From Queue**
  - Remove a Batched report from the queue, as long as the status says Pending..., Pending On New Data Load or Running, so it will not run as a batch.

The **Refresh** button in the File Center title bar allows you to update the status.

**Cluster**

These buttons appear in Cluster Setup:

**Cluster Set Toolbar:**

- **New**
  - Start a new cluster set.
- **Save As**
  - Save the cluster set with a new name.
### Screens and Components

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit</strong></td>
<td>Edit a cluster set.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Delete a cluster set.</td>
</tr>
</tbody>
</table>

### Cluster Toolbar:

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save</strong></td>
<td>Save the cluster(s) in the cluster set.</td>
</tr>
<tr>
<td><strong>New Cluster</strong></td>
<td>Start a new cluster within the cluster set.</td>
</tr>
<tr>
<td><strong>Rename Cluster</strong></td>
<td>Rename a cluster.</td>
</tr>
<tr>
<td><strong>Delete Cluster</strong></td>
<td>Delete a cluster.</td>
</tr>
<tr>
<td><strong>Move Up</strong></td>
<td>Move Down</td>
</tr>
<tr>
<td><strong>Others</strong></td>
<td>This check box adds an &quot;all others&quot; cluster to the set.</td>
</tr>
</tbody>
</table>
### Custom Grouping

#### Custom Grouping Toolbar:

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Start a new custom grouping.</td>
</tr>
<tr>
<td>Save As</td>
<td>Save the custom grouping with a new name.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit the custom grouping name, description, and included fields and attributes.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete a custom grouping.</td>
</tr>
<tr>
<td>Export</td>
<td>Export the values defined within the ‘Custom Group Detail’ screen.</td>
</tr>
</tbody>
</table>

#### Custom Group Detail Toolbar:

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Save the details about the custom group, including values for each field and attribute.</td>
</tr>
<tr>
<td>Add New</td>
<td>Add a new combined field to the custom grouping.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete a combined field from the custom grouping.</td>
</tr>
<tr>
<td>Move Up</td>
<td>Rearrange the columns in the custom grouping by moving them up or down.</td>
</tr>
<tr>
<td>Move Down</td>
<td></td>
</tr>
</tbody>
</table>
Library Tab

About Library Tab

Components on the Library Tab

The Library tab opens first when you log in to the application. The tab shows all reports that you can open and run, listed in various components. You see the components that are in your subscription.

To get started using the Library tab:

1. Select the data source on which to report from the drop-down list in the Title Bar.

2. Edit or run a saved report in All Reports.

   Or

   Edit or run a report in My Reports or Recent Reports.

   Or

   Edit or run a report in Standard Templates.

   Or

   Start a new report by choosing the Pro in the left navigation panel. (Pro users only)

(See Also: Starting a Report and Working with Standard Templates)

Returning to the Library Tab

To return to the Library tab, click the Library tab label.
Moving and Resizing

You can move or resize the components on the tab:

To move:
1. Position the mouse pointer over the header. The mouse pointer changes to a four-header arrow.
2. Click and drag the component up or down.

To resize:
1. Position the mouse pointer over the bottom edge of a component. The mouse pointer changes to a two-headed arrow.
2. Click and drag to resize the depth of the component.

(See Also: Changing the Appearance for information on collapsing or expanding the components and on displaying them full screen.)

Data Source List

The Data Source List is the list of all the data sources to which you have access.

The Data Source List is displayed automatically when you first log in and if you set your preferences to require you to select a data source each time you log in. (See Also: Setting Preferences)

To use the data source:
1. Drill down through the list to the data source you wish to open.
2. Double click a data source to open or highlight the data source and click Select.

* If you prefer to view a list instead of a tree, choose the Show as Grid button in the Data Source List. You can then sort a column by clicking its header.

Changing the Data Source in the Title Bar

The Title Bar shows the open data source and the range of dates for which data is available. You can use the drop-down list in the Title Bar to select a data source at any time. (See Also: Selecting a Data Source)
Recent Reports

Recent Reports on the Library tab shows the reports you have recently run and when you ran them. This list includes both the reports you created and other users' public reports that you ran.

The component shows the date the report was last accessed, the report name, and the description (if any).

Open one of the reports by highlighting it and choosing the Edit button or by clicking the link. Or highlight the report and run it with the Run button.

(See Also: Working with Recent Reports)

My Reports

My Reports on the Library tab lists reports you have created, showing:

- The folder it is stored in
- The report name and description (if any)
- Who created it and when
- Who modified it and when
- Whether the report is public or not. (You see other user's public reports within your company and data source.)
- If the report is queued to run in batch mode, My Reports shows the date and the person who batched it.
- Status of the batch if the report has been batched.

* Choose the Refresh button to update the status.
Options in My Reports

- Open a report by highlighting the report and choosing the **Edit** button. Or run it with the **Run** button.
- You can make the report public so others can see it by choosing the **Public** checkbox.
- The **Batch** button opens the Batch dialog box so you can set batch options.
- **Remove from Queue** takes the report out of the batch queue as long as the report status says Pending..., Pending On New Data Load or Running, so it will not run as a batch.

(See Also: [Working with My Reports](#))

All Reports

About All Reports

The All Reports component is used to save reports so you can run them again, organize saved reports, and open saved reports. (See Also: [Toolbars](#) for information on the All Reports tools.)

All Reports Folders

- On the left is a tree of folders. Use the folders to organize saved reports. Buttons on the toolbar allow you to expand or contract the tree, delete a folder, or create a new folder.
- When you select a folder, the reports saved in that folder are shown at the right. The columns show:
  - The folder it is stored in
  - The report name and description (if any)
  - Who created it and when
  - Who modified it and when
  - Whether the report is public or not.
  - If the report is queued to run in batch mode, All Reports shows the date and the person who batched it.
• Status of the batch if the report has been batched.

* Choose the refresh button to update the status.

**Saving a Report to All Reports**

• Choose the Save or Save As button in Builder to save a report. It will appear in All Reports. The specifications are saved so the report can be run again.

**Using All Reports**

• Open and edit a report by highlighting it and choosing the Edit button. It opens on the Builder tab.
• Run the report by highlighting it and choosing the Run button.
• The Batch button opens the Batch dialog box so you can set batch options.
• Remove from Queue takes the report out of the batch queue as long as the report status says Pending..., Pending On New Data Load or Running, so it will not run as a batch.

Use the options on the toolbar to edit, run, copy, move, or rename the reports or to work with the folders. (See Also: Working with All Reports, Working with Folders and Opening, Copying, Moving, Renaming, Deleting Reports)
Builder Tab

On the Builder tab, you can create and run a report. If you have opened a saved report, you can run the report again or change the specifications before you run the report. You can also batch a report and have it delivered as a file in the File Center.

Create a report:
- Specify report options in Report Options at the left. (See Also: Report Options)
- Refine your choices in the Workspace in the center pane. (See Also: Workspace)
- View the report criteria at the right as you create the report. (See Also: Report Selections)

Run a report:
- Run a report by choosing Run in the toolbar at the lower right. If you change the options, choose the Run button again to see the updated report on the Viewer tab.

Batch a report:
- Batch the report to have it delivered directly to you as a file rather than in the Viewer. (See Also: Batching Reports)

Report Options

About Report Options

Report Options is a step-by-step guide to building a report. The expanding tree in Report Options on the Builder tab lets you specify the filters, layout, and measures for your report. If you have opened a saved report, you can change the specifications in Report Options. (For information on creating a report, see also: Choosing Filters, Layout, Measures and Creating a New Report.)
Select

Make selections by clicking the plus sign or the title bar of a section and then drilling down through the tree to the option you need.

1. Select filters for data in the Filter section. Filters subset the data.
2. Design your report layout in Layout. Layout lets you specify which headings to put in rows and columns.
3. Select Measures—calculations and volumes—in the Measures section.
4. Optional: Specify ranges in the Report Results folder of the Measures section.

Refine

For each filter, layout choice, and measure, when you reach a point where the tree no longer expands, the Workspace opens with additional selections. Refine your filter, layout, and measure options in the Workspace.
View

View your choices in Report Selections.

Choose the **Preview** button to open the Preview tab to see the arrangement of rows and columns, without any data.
Run

Run the report by choosing the **Run** button. Or choose the **Batch** button for delivery in the File Center. The Builder tab remains open; you can make changes in Builder, run your report and see the results of those changes on the Viewer tab.

Workspace

About the Workspace

The Workspace is where you refine selections made in Report Options.

When you have selected a filter, layout choice, or measure in Report Options and have reached the point where the tree no longer expands, refine your selections in the Workspace. The Workspace is used for both Pro and Standard Reports.

Finding in the Workspace

If multiple pages of results display you can search using the **Search** box.

(See Also: [Searching in Report Creation (Pro)](Pro) and [Searching in Report Filters (Reports)](Reports).)
Selecting in the Workspace

Available choices are displayed in the top area, and criteria you have selected are in the area below. There are several ways to select criteria:

- Highlight a choice and choose the Add or Remove button to move it into or out of the selected area.
- Double click a choice to move it into or out of the selected area.
- Hold down the CTRL key and click the mouse to select more than one option. Then use the Add or Remove button to move all selections.
- Highlight the first row, then hold the SHIFT key and click the mouse on another row to select all the rows between. Then use the Add or Remove button to move all selections.

For some criteria, you can choose the Exclude checkbox to exclude the data when filtering. (Only one option can be used for a set of filters.)

Choices are shown in Report Selections.

Choosing Time Periods in the Workspace

Time period filters are selected in the Workspace by selecting drop-down lists and checkboxes.

(See Also: Using Time Filters (Pro) and Working with Report Time Filters.)
Report Selections

Report Selections is always "in sync" with the choices you have made in Report Options and the Workspace.

- View the options you are selecting as you create a report.
- Review report selections for a saved report.
- Click on one of the underlined specifications to open the Workspace for that choice.

Clicking an underlined link allows you to make changes to the report specifications without having to drill down through Report Options.
Notification Center

On the Builder tab, the Notification Center helps guide you to successful report creation. The messages in this center tell you what steps need to be completed before your report is ready to run. In addition, in order to make sure that your report will not return too much data or otherwise create a report that will take too long to render on the screen, messages in the Notification Center alert you to limits on what you can include in a report.

Some messages ask you to use filters to limit the amount of data in your report. Some messages refer to fields you have placed in columns. You can put these fields in rows instead. Click the underlined text in the message to open the section of Report Options where you can correct the report specifications.

Running or Batching the Report

When you have addressed all the messages in the Notification Center, the "Report is ready to run" message will be displayed and the Run button will be enabled. Choose the button to run your report.

If you have messages in the Notification Center indicating that you are over the data limit for a report to be shown in the Viewer, you can choose instead to batch the report and have it delivered as a file to download in the File Center. Save the report and choose the Batch button.

Standard Reports

If you are running a standard report, the Notification Center alerts you to choices you need to make as you customize your report.

Viewer Tab

The Builder tab is where report options are set. When you run a report, it displays on the Viewer tab.
On this tab you can:

- View the data and change the report layout by moving headings to rows, columns, or page by or by changing the order. (See Also: Viewing Cube Reports)
- Print the report. (See Also: Printing Reports)
- Export the data. (See Also: Exporting Reports)
- Save Viewer Format. (See Also: Viewing Cube Reports)

You can also click the Builder tab, make changes, and run the report to see the report with the new options on the Viewer tab.

* When you make changes on the Builder tab, choose the Run button to see those changes on the Viewer tab.

Standard Templates

Standard Templates are commonly used report types. These reports are designed by NPD and made available to you in the Standard Templates component on the Library tab.

When you open a standard template, you have options to customize the report by making some choices. Builder displays only the choices that are available for this report.

For example, you might be able to select the category and channel for the report filters, but not change the measures because the measures defined are those needed for this report.

See Also: Working with Standard Templates.
File Center

Open the File Center from **File Center** in the left navigation panel. On the File Center tab:

- Within the Batch Reports tab, check the status of batched reports and download completed files.

  You can see the status of each batch report, when it was batched, when it was last accessed, when it will expire and be removed from the File Center.

  You see your own batched report files and public reports batched by others in your company who have access to the same data in this data source.

  Files are overwritten if the same batch is run again or deleted after 90 days. (See Also: Viewing Batched Reports Status)

- If you see a status of Error, hold the mouse pointer over the status to read the pop-up message explaining the error.

- On the File Repository tab, find basic information about the business and data source, such as data delivery calendars and definitions. You can download the files.
Customizing

Changing the Appearance

On the Library tab, you can customize the appearance of the screen by collapsing elements, viewing them full screen, changing the order, or resizing them. Your screen changes will be saved and displayed the next time you log in.

Rolling Up or Expanding Screen Elements

- To roll up a screen element, leaving only its title bar on the screen, choose the button in the title bar.
- Choose the button again to expand the screen element.

Moving or Resizing

To move:
1. Position the mouse pointer over the header. The mouse pointer changes to a four-header arrow.
2. Click and drag the component up or down the screen.

To resize:
1. Position the mouse pointer over the sizing bar in the center lower edge of a component. The mouse pointer changes to a two-headed arrow.
2. Click and drag to resize the depth.

(See also: Setting Preferences for information on changing colors.)
Setting Preferences

Choose **Preferences** under **Setup** in the left navigation panel.

You can set these preferences:

<table>
<thead>
<tr>
<th>Preference Tab</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Source</td>
<td>Determine whether to show the last selected data source, to show a specified data source, or to select the data source at each login from the Data Source List.</td>
</tr>
</tbody>
</table>
| Builder        | Set:  
  - Default number of rows to display in the Workspace. A larger number may take longer to display, but will reduce the number of pages you need to scroll through to find a specific choice.  
  - Custom header for every report, no matter which data source you are in. (Specify a header for a specific report with the Display Settings option. See also: [Selecting Display Options](#)). 
  - Custom footer for every report.  
  
  **NOTE** Custom headers and footers apply only to exported and printed reports. |
| Viewer         | Set:  
  - Number of report rows to display on the Viewer tab.  
  - Whether to display totals at the top or bottom of the report or not at all.  
  - Specify the default number of results to display when displaying Top N and indicate whether or not to display the "Others."  
  - Customize the colors for low transaction warnings for consumer data reports.  
  See Also: [Viewing Reports](#) |
| Customize Format | Choose the number format to use in reports:  
  - 1,000,000.00 -- Commas separate every three digits, and dot separates the decimal fraction.  
  - 1.000.000,00 -- Dots separate every three digits, and a comma separates the decimal fraction.  
  - 1 000 000,00 -- Spaces separate every three digits, and a comma separates the decimal fraction.  
  Collapse the 'Others’ Detail  
  - Whether to collapse the ‘Others’ detail rows for Top N, Clusters, Custom Groups, and Share of Total field.  
  If you have .CSV exports in your subscription, you can choose the delimiter to use in exports:  
  - comma,  
  - semicolon ; |
• pipe |
• or Tab Delimited tab

If you have .CVS exports, you can also specify whether to export the data rounded (the way it appears in the Viewer) or not rounded.

**Collapse ‘Others’**

When you create a report with a Top N or build Clusters, you can add ‘Others,’ which is the total of all of the values that are greater than the Top N or those which you did not include in your Cluster. Within Custom Groups, ‘Others’ is automatically created for you; it includes all of the values from each of the fields you didn’t use.

In the past when you included Top N, Clusters, Custom Groups, or Share of Total fields (where available), the ‘Others’ detail was expanded by default. Users could collapse ‘Others’ rows after running a report in the Viewer.

Now, via Preferences, you can set Top N, Clusters, Custom Groups, and Share of Total fields with ‘Others’ row **collapsed** by default.

**Things to know**

- The Collapse Others feature is applied to all of your reports containing Top N, Clusters, Custom Groups, or Share of Total fields, including all new reports and all saved and batch reports.
- At any time, you can modify your preferences to expand ‘Others.’
- You can expand the ‘Others’ detail rows after running the report in the Viewer.
- Benefits include reducing report output clutter and alleviating the need to manually collapse ‘Others’ detail rows after running the report in the Viewer.

**What is the difference between All Other (Suppressed) and ‘Others’?**

“All Other (Suppressed)” is the total of the suppressed volume within a report, but ‘Others’ is the difference between what you have asked to see and what is still remaining (which keeps the grand total intact).

- For example, if there are 250 items and you want to see only the Top 5, the remaining 245 items will be aggregated into a single line called ‘Others.’
How to set the “Collapse Others” option in Preferences

- From the left navigation panel, click Setup, Preferences, and then click on the Customize Format tab. Under the User Selection Formatting section, check the Collapse ‘Other’ detail box. Click OK to make this change.
Pro--Creating Reports

Creating a New Report

If you have access to Pro, you can create a new *ad hoc report*. Choose Pro in the left navigation panel and use the Builder tab to design your report.

Filter Data

1. Select a *data source* from among those you subscribe to. (See Also: Data Source List)
2. In the Filter section of Report Options, drill down through the tree to specify how you want the data filtered. You need to filter on at least one time period to reduce the amount of data that will be returned.
3. When you reach an option that no longer expands, the Workspace in the center of the screen displays further choices. For example, if you select *Category*, the Workspace allows you to select specific categories.

Design the Report Layout

1. In the Layout tree, specify what data will be shown in the report rows and columns. (These can be rearranged in the Viewer.)
2. Again, in the Workspace, refine the layout. For example, select Product in the tree and then decide which types of Product data to include as rows or columns (category, subcategory, and so on).

Select Measures

1. In the Measures tree, drill down to the type of measure you want.
2. Select specific measures in the Workspace.

View and Change Your Options

As you make your choices, report specifications will be displayed in Report Selections. Click on a link to view that choice in the Workspace.

* Choose the Preview button to open the Preview tab to see the arrangement of rows and columns without any data.
Check Notification Center

1. As you work, check the messages in the Notification Center. They alert you to remaining steps.

2. If you see a message alerting you to a limit (such as the number of measures you can include in the report); you must address this limit before you can run the report. Click the underlined text to jump to Report Options to make changes.
   - Make selections in the filter to further subset the data.
   - And/Or
   - Change the report layout.

3. When you have cleared all the alerts in the Notification Center, the message "Report is ready to run" will be displayed. The Run button will be enabled.

Reports too large to run in the Viewer can be delivered directly to you as a file. (See Batch the Report below.)

Run and Save the Report

1. Run a cube using the Run button.

2. View the report. (See Also: Viewing Reports)

3. Print or export the report.

4. Choose the Save button on the lower toolbar to save the specifications so you can run the report again. (See Also: Saving Reports)

Batch the Report

If your report is too large to view in the viewer or you wish to have it delivered directly as a file:

1. Save the report by choosing the Save button.

2. Choose the Batch button.

3. You can choose to have the batch run immediately or recurring with every data load, and you can specify the format of the report.

4. Download your completed report in the File Center.

(See Also: Batching Reports)

Starting a Report

To start a report in Pro:

1. Log in.

2. Select the data source from the Data Source List or from the drop-down list on the Title Bar.
3. (New Report) Choose Pro in the left navigation panel to begin a new report.

4. (Modify Existing Report) To open and modify an existing report:
   - Locate and click the link to a saved report in My Reports or Recent Reports. Or highlight the report and choose the Edit button.
   Or
   - Locate a report in All Reports. Double click to open.
   The new blank report or the saved report opens on the Builder tab.

(See Also: Choosing Filters, Layout, Measures for information on how to select report specifications.)

Choosing Filters, Layout, Measures

To create a report or to change a saved report, use the following:

- Filters that subset the data according to criteria that you specify.
- Report layout that defines the rows and columns of the report.
- Measures that specify the volumetrics and calculations to display (such as units, value, average price, unit share).

Sequence of Steps

Generally, you should work in this order on the Builder tab:

1. Filter (See Also: Working with Filters)
2. Layout (See Also: Specifying Layout)
3. Measures (See Also: Working with Measures)
4. (Optional) Specify data ranges (See Also: Defining Data Ranges)
5. (Optional) Specify custom title, header, and footer (See Also: Selecting Display Options)
6. Run the report with the Run button.
   Or

   Save the report and choose the Batch button to have it delivered to you in the File Center (Pro users only).

   ✴ Choose the Preview button to open the Preview tab to see the arrangement of rows and columns without any data.
Working with Filters

About Filters

Use filters to select data to include in your report.

* Because the data sources are very large, it is important to use filters to subset the data you are bringing into the report. Otherwise, response time may not be what you wish.

Selecting Filters

Begin creating a report by specifying the filters to be used:

1. Drill down through filters in the Filter section of Report Options.
2. When you get to an item that no longer expands, the Workspace will display the options available for that filter.

   ![NOTE]
   For some criteria, you have to make a selection from one filter set before you can see additional options. Example: Select Brand before selecting an Item within the Brand.

3. In the Workspace, select filter criteria by moving them from the available top area to the selected area below. (See Also: Workspace and Searching in Report Creation)
4. Repeat these steps to add additional filters as required.

Selecting Time Period Filters

- You should filter the data on a time period. The Notification Center will display a reminder message until you do so. (See Also: Using Time Filters)
- You have the option of comparing that data to the previous year or viewing a trend. (See Also: Comparing Over Time)

Next Step

Design the report layout. (See Also: Specifying Layout)
Searching in Report Creation

Viewing Results in the Workspace

When more than one screen of results is displayed in filter, layout, or measures, you can navigate quickly through the results.

Click the Page x of x button and:

- Move the slider to navigate through the report.
- Change the number of rows to display per page.
- Specify the number of rows to display by default in Preferences. (See Also: Setting Preferences)

Searching in the Workspace

To make locating specific filters, layout choices, or measures easier, you can use the Search function in the Workspace section of the Builder tab.

To search:

1. Enter text in the Search text box.
   - You do not have to press Enter or click the magnifying glass for the matches to display; they begin to display when you have entered two characters.
   - Use the * wildcard to help find matches. s* returns all entries starting with "s." *sys returns all entries with "sys" anywhere in the text.

2. Select from the results. The selections display in the top pane of the Workspace, where you can double click to move them to the selected pane.

3. To clear the Search box, choose the X.
Using Time Filters

About Time Period Filters

The Filter section of Report Options is where you can filter the data for the time period you need to report on. You can include as many as three time periods in your report. (The number you can include depends on your subscription. Batch the report if you need more time periods.) For example, you can display sales data for the current month and also total sales for a 3-month period.

You can choose from the time period options offered for monthly and weekly data, and also create your own custom time periods, as outlined below.

You must select at least one time period filter along with one layout option and one measure in order to run or batch a report. The Notification Center will display reminder messages.

Selecting a Time Period -- Including Custom Periods

To select a time period filter for your report:

1. In Report Options Filter, choose the Time Period option and Time Period(s) under it.
2. In the Workspace first select the Time Scale.
Your choices for monthly datasets are shown in the **Time Scale** drop-down menu and table below.
<table>
<thead>
<tr>
<th>Time Scale Choice</th>
<th>Filters On...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month</td>
<td>A single month--the current month or any other month for which data is available.</td>
</tr>
<tr>
<td>3 Months (Combined)</td>
<td>A 3-month period.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 3-month total.</td>
</tr>
<tr>
<td>6 Months (Combined)</td>
<td>A 6-month period.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 6-month total.</td>
</tr>
<tr>
<td>12 Months (Combined)</td>
<td>A 12-month period.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 12-month total.</td>
</tr>
<tr>
<td>24 Months (Combined)</td>
<td>A 24-month period.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 24-month total.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 36-month total.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 48-month total.</td>
</tr>
<tr>
<td>Year-to-Date Calendar</td>
<td>The period from January to the end date you select.</td>
</tr>
<tr>
<td>(Combined)</td>
<td>Data will be shown as a total for that period.</td>
</tr>
<tr>
<td>Year-to-Date Calendar</td>
<td>The period from January to the end date you select.</td>
</tr>
<tr>
<td>(Monthly Trend)</td>
<td>Data will be shown by month.</td>
</tr>
<tr>
<td>Custom Months</td>
<td>Displays a total for the number of months you specify, ending on the End Month you select.</td>
</tr>
<tr>
<td></td>
<td>When you select this option, a number box will be displayed where you can specify the number of months.</td>
</tr>
<tr>
<td>Custom Year-to-Date</td>
<td>Create a custom Fiscal/Retail year that begins on the start month you select.</td>
</tr>
<tr>
<td></td>
<td>Auto Update automatically refreshes reports with new monthly data as it becomes available.</td>
</tr>
<tr>
<td>Custom Period-to-Date</td>
<td>Select any start month and report up to the current period.</td>
</tr>
<tr>
<td></td>
<td>Auto Update automatically refreshes reports with new monthly data as it becomes available.</td>
</tr>
</tbody>
</table>
Your choices for weekly datasets are shown in the **Time Scale** drop-down menu and table below.

<table>
<thead>
<tr>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Week</strong></td>
</tr>
<tr>
<td>4 Weeks (Combined)</td>
</tr>
<tr>
<td>5 Weeks (Combined)</td>
</tr>
<tr>
<td>13 Weeks (Combined)</td>
</tr>
<tr>
<td>26 Weeks (Combined)</td>
</tr>
<tr>
<td>52 Weeks (Combined)</td>
</tr>
<tr>
<td>Year-to-Date Calendar (Combined)</td>
</tr>
<tr>
<td>Year-to-Date Calendar (Trend)</td>
</tr>
<tr>
<td>Custom Week(s)</td>
</tr>
<tr>
<td>Custom Year-to-Date</td>
</tr>
<tr>
<td>Custom Period-to-Date</td>
</tr>
<tr>
<td>Month-to-Date</td>
</tr>
<tr>
<td>Time Scale Choice</td>
</tr>
<tr>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Week</td>
</tr>
<tr>
<td>Quad Weeks (Combined)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>5 Weeks (Combined)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>13 Weeks (Combined)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>26 Weeks (Combined)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>52 Weeks (Combined)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Year-to-Date Calendar (Combined)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Year-to-Date Calendar (Trend)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Custom Weeks</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Custom Year-to-Date</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Custom Period-to-Date</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Month-to-Date</td>
</tr>
</tbody>
</table>

* Click here to view the full [Time Periods Grid for Monthly and Weekly time period options](#).
To display a custom period, choose the **Custom Months** option from the **Time Scale** drop-down menu:

3. (If you select Custom Months) Use the arrows to select the number of months from 1 to 12.

4. Select the **End Month** or **End Week** from among the possible choices in the drop-down box.
   - If you choose **Auto Update**, the most recent month or week will be used as the end date every time the report is run. The report will update when a new month (or week) of data is available and you run the report again.
   - If you pick a specific end date, that date will be used each time the report is run.

   (Optional) Compare to previous periods as a **Trend** report or a comparison to **Year Ago**. (See: [Comparing Over Time](#))

5. Choose the **Add** button to move your time period to the Selected area.
   
   (Optional) Choose additional time periods for your report.
Including Time in the Report Layout

1. In the Layout section of Report Options, choose Time Period.
2. In the Workspace, add Time Period(s) to your layout in order to see your time periods as rows or columns in your report.

**NOTE** If you include multiple time periods, the report will be "locked," and you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field.

Using a Time Period Cluster Set

If your subscription includes the ability to create cluster sets and you have created a time cluster set, you can filter on it. (If someone has created a time period cluster set and made it public, you can select it.)

1. Select the View Cluster Set choice in the Workspace.
2. Choose a Time Cluster Set. (See Also: Using Clusters & Cluster Sets in Reports)

Comparing Over Time

About Comparing over Time

You can specify comparisons:

- Against the same period a year ago.
- Against a set of successive periods -- Trend.

Or
- Against sales in overlapping cycles -- Rolling Trend.

These choices are available in the Workspace.

* If there is not enough data available to show a comparison, the option(s) will be grayed out.

Comparing Data

To compare over time:

1. In the Filter section, select Time Period and then Time Period(s) underneath.
2. In the Workspace, select a **Time Scale, End Month/Week, or Auto Update.** (See Also: **Using Time Filters**)

3. With the Display As feature, you can select how you want to display the results - either **Individual**, by individual weeks or months, or **Combined**, as aggregated totals of selected time periods.

4. Choose how you want to compare your selected period from the options in the Workspace.

<table>
<thead>
<tr>
<th>Option</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Comparison</strong></td>
<td><strong>None</strong> - Do not do any comparison.</td>
</tr>
<tr>
<td></td>
<td><strong>Year Ago</strong> - Compare to the selected time period a year ago. (Example, compare 3 months to the same 3 months a year ago.)</td>
</tr>
<tr>
<td></td>
<td>• Always available as long as data is available.</td>
</tr>
<tr>
<td></td>
<td><strong>Trend</strong> - Compare to successive periods in the past. (Example, compare 3 months to the previous 3 months.)</td>
</tr>
<tr>
<td></td>
<td>• Available only if the selected option for Display As is Combined, or Individual and # of months/weeks is = 1, and data is available.</td>
</tr>
<tr>
<td></td>
<td><strong>Rolling Trend</strong> - Compare sales in overlapping cycles. For instance, apply rolling averages to selected time periods (i.e., 3, 6, or 12 months), as well as year-ago percent change on trended periods.</td>
</tr>
<tr>
<td></td>
<td>• Available only if the selected option for Display As is Combined, and data is available.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Number of Comparison Periods</strong></th>
<th>Select the number of periods to include in the comparison.</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Image" alt="Number of Comparison Periods" /></td>
<td><img src="Image" alt="Click the top arrow in the button to increase the number; the lower arrow to decrease the number." /></td>
</tr>
</tbody>
</table>

| **Calculate Percent/Point Change** | Show the percent or point change between periods. |
5. Add the period to your filters. (If you are adding multiple periods, you can include a comparison in any or all of them.)

The report will show the most recent comparison period followed by the next older period and so on. The latest period is last.

Examples

You pick a Time Period filter of 3 Months (Combined) with an end date April 2011.

- If you select the "Year Ago" comparison and 1 comparison period, you will see data for February to April (3 months) for 2011 and for February to April 2010.

- If you select the "Trend" comparison and 4 comparison periods, you will see data for the period February to April 2011 and for the previous 3 months--November 2010 to January 2011, and for the 3 months August to October 2010, and so on.

- If you select “Rolling Trend” comparison and 4 comparison periods, you will see data for the period February to April 2011, followed by January to March 2011, December 2010 to February 2011, and so on.

For more examples on Rolling Trend, see the DecisionKey Enhanced Time Periods Reference Guide.

Specifying Layout

About Report Layout

After you select filters for your report, specify your report layout--rows, columns, and page by.

**NOTE** The Notification Center will alert you to limits on the number of columns you can include. You can batch the report if you need to include more data.
Creating the Layout

For each heading that you want to use in your report, follow these steps:

1. Drill down through the Layout section of Report Options.
2. When you get to an item that no longer expands, the Workspace will display the available choices. Select headings for the report layout by moving them from the top available area to the selected area below. (See Also: Workspace for information on making selections.)

In Layout select **Time Period** in the tree and **Time Period(s)** in the Workspace to put time in your column (or row). If you have multiple time periods in filters, you must put time in the columns.
You can search in Layout and page through the results. (See also: Searching in Report Creation)

Selecting Layout Options

Choose from options for your layout. Options control how the data is displayed in the report.
<table>
<thead>
<tr>
<th>Option</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotal</td>
<td>To include a subtotal in the report, check off the Subtotal box located within Layout. For example, in a report with category group and category, check on subtotal for the category group field to see a subtotal of each category group. If you include a subtotal and the report includes any measure where totals and subtotals are not applicable because the measure is a non-additive measure, that subtotal will be blank in the report.</td>
</tr>
</tbody>
</table>
| Orientation | Select **Row**, **Column**, or **Page** to place the heading initially in this orientation. You can change these later in the Viewer.  

* If the report uses non-additive measures such as % of Stores Ever Selling, includes benchmarks, includes multiple time periods, displays overall rank, or includes a non-mutually exclusive field such as an appended field, custom grouping, or a multi-punch field, you will not be able to move rows or columns, or move anything to the page field. Specify the layout before running. The lock symbol shows the report is “locked.” |
| Append Columns and/or Append Rows | This changes the fields from nested to appended in the selected orientation. |
| Grand Total | Choose the checkbox to display a grand total.  

**Grand Total** can be selected on any heading and applies to all headings in the layout. All columns will have a grand total if you select this. |
| Page Total | Provides “total” as a field option even if the report is locked. |

**Move Up** and **Move Down** buttons to move headings up or down to change order of the display in the report. |

Your specifications are shown in Report Selections.

**Next Step**

Choose the measures for the report. (See Also: *Working with Measures*)
Working with Measures

After selecting filters and specifying the layout, select measures for the report. You can also show rank in your report.

Choosing Measures

For each measure that you want in your report, follow these steps:

1. Select a measure type in the Measures section. (Measures are grouped by Units / Currency, Pricing, and so on.)

2. In the Workspace, select measures by moving them from the available top area to the selected area below. You can include up to ten measures in a report run in the Viewer. To include more measures, you can batch the report.
3. Use the order arrows to move measures up or down to change the display of measures in the report.

4. Choose the **Column** or **Row** radio button to determine whether the measures will be displayed in columns or rows. All measures are by default placed in columns but you can modify that.

   **NOTE** If you choose a currency measure, the currency displayed will depend on the data source. For U.S. data sources, for example, the currency will be Dollars. For France, for example, you will see Euros in the report.

### Displaying Rank

(Optional) To display a column or row with a rank order number, use the options in the Workspace.

There are two kinds of rank:

- **Overall Rank** -- Overall Rank shows the unique rank no matter what order the fields are in. There is one set of overall rank for the entire report.
Group Rank -- Group Rank shows the position of each value within its group. You might show Group Rank of each brand within its category, or each item within its brand, for example. There is a set of group ranks for each group in the report.

To display overall or group rank:

1. Select the Group Rank check box to include a Group Rank Measure Name row or column in your report. You can select more than one measure for group rank.

And/Or

2. Select the Overall Rank radio button for one measure. This will add an Overall Rank Measure Name row or column. You can select only one overall rank.

**NOTE** Overall Rank is available for Units and Currency measures. If Overall Rank is grayed out, it is not available for that measure. In this example, Overall Rank is not available for the Unit Share measure.
When you include overall rank, the report will be locked. You will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column.

Next Steps

* Choose the **Preview** button to open the Preview tab to see the arrangement of rows and columns without any data.

  - (Optional) Add Share Measures. (See Also: [Using Share Measures](#))
  - (Optional) Limit the data in the report by setting data ranges. (See Also: [Defining Data Ranges](#))
  - (Optional) Select display options for the report. (See Also: [Selecting Display Options](#))
  - Choose the **Save** button to save the report or the **Save As** to save it with a different name.
  - Choose the **Run** button to run the report or the **Batch** button to batch it.

Using Price Segmentation

Price Segmentation is a powerful feature that lets you flexibly and efficiently create your own customized price bands for price segmentation analysis. (See Also: [Working with Clusters and Cluster Sets](#))

**NOTE**: Price segmentation is available to Pro users only in most types of data sets. If available for your data set, you can use it to create customized price bands.

Setting Up a Price Segmentation Cluster Set

To set up a Price Segmentation Cluster Set in POS or consumer data:

1. Choose **Setup** in the left navigation panel and select **Cluster Setup**.

   The Cluster Setup tab will open. If price segmentation is available in the data source selected, you will see **Price Segmentation** as a separate folder.
2. Choose the **Price Segmentation** folder and select the **Price Segmentation** option you want to use.

3. Choose the **New** button.

4. Complete the New Cluster Set dialog box:

   a. Enter a name and description (optional) for the Price Segmentation Cluster Set.

   b. Choose the **Public** checkbox if you want others in your company with the same data access to see this.

   c. Choose the **OK** button.
**BEST PRACTICE: Creating Price Segmentation Clusters**

To ensure that your price segments consistently fall into the correct segments regardless of the order in which the segments are created, end your segments with .99. Below is an example of the exact same segments but in reverse order. As you can see, the $50.00 will always appear in the second segment irrespective of whether the segments begin with the smallest segment of the largest.

![Price Segmentation Example](image)

**Creating Price Segmentation Clusters**

1. Choose the **New Cluster & Range** button in the Cluster toolbar at bottom.
   The Add/Edit Range dialog box will be displayed.

2. Set up a price band:
   a. Select an operator (>=, >, <=, <, between, etc.).
   b. Enter the value for the range.
   c. Choose the **OK** button.

![Add Cluster & Range](image)

3. The Cluster will be added to the Cluster Set. The name will describe the range you entered. You can click the name and choose the **Edit** button to rename if you wish.

4. To add additional Clusters to the set, repeat the steps above.

   **NOTE** You cannot reuse values in a Cluster Set.

5. When finished, click **Save**.
Using Price Segmentation in a Report

In Builder:

1. You will find the **Price Segmentation** option(s) in the Price Segmentation folder within the Filter section.

2. Select the Price Segmentation option you want to use.

3. Highlight your Cluster Set, and click **Add** or double-click to add the Cluster Set to the Filter.
   - The Price Segmentation Cluster Sets you have created, as well as public Price Segmentation Cluster Sets will be displayed.
   - You must include a channel, outlet family, or outlet field in either Filter or Layout in order to use the Price Segmentation (Channel/Outlet) option in a report.


5. Add your Price Segmentation Cluster Set and/or Cluster to the Layout.
Using Share Measures

About Share Measures

Share and Share of Subtotal measures are available in the Measures tree.

- Share is a percentage of the grand total.
- Share of Subtotal shows the percentage based on the subtotal.

Including Share Measures

To use a share measure:

1. Select the Units / Currency measure type in the Measures section.
2. In the Workspace, select share measures such as Unit Share or Unit Share of Subtotal by moving them from the available top area to the selected area below.

Example

In this example, Unit Share and Unit Share of Subtotal are used.

- 85.6 is the Unit Share for 2D LCD TVs in Jan 2013—the percent that 2D LCD sales represents of the grand total of all televisions in Jan 2013. (Not all report rows are shown in the example screen.)
- 92.2 is the share that 2D LCD sales represents of the subtotal for LCD TVs in that month. (The other 7.8 was 3D LCD TVs.)
These are column share measures. To display share of row, use the **Settings** tool on the Viewer toolbar. (See also: [Changing Measures](#))

### Defining Data Ranges

#### About Data Ranges

Under **Report Results** in the Measures section, you can set ranges to limit the data that will be included in the report.

![NOTE] Restricting results to a range makes each measure in the report a non-additive measure. This locks the report so you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column.

#### To Set Ranges

To set a range for measures you have selected:

1. Choose **Report Results** under Measures in Report Options.

   The Workspace will display measures for this data source, but only those where a range can be set. This will include measures you selected in the tree and measures still available to be selected.
2. To specify a range for a measure, move it to the selected area.

3. Click in the **Operator** column. Select the operator from the drop-down list:
   - >=
   - >
   - <=
   - <
   - =
   - Between
   - Not Between

4. Enter values:
   a. Enter the value in the **First Value** field.
   b. (If necessary) Enter the second value of a range in the **Second Value** field.

5. Use the up and down arrows to move any of the ranges up or down in the list.
   Data will be subset in the specified order.

**NOTE** In your report, any time periods where the measure does not fall into the specified range will be shown as 0. The grand totals will still reflect all the sales, including those not displayed in the report.
Selecting Display Options

Setting Display Options

These choices are optional; the report will display with default values if you do not make choices.

To set options:

1. Select Display Settings in Report Options.
2. Choose the Custom Text option.

**NOTE** These custom header and footer will originally display any you have set with the Preferences tool on the Toolbar. Change the text to override the preferences for this report. (See Also: Setting Preferences)
Pro--Viewing Reports

Viewing Reports

About Reports in Pro

When you run a report from the Builder, the report opens in the Viewer tab. On that tab you can change the report layout by moving fields to vertical or horizontal orientations or to page by. You can also filter data, sort columns and rows, and collapse or expand a dimension.

- Fields are displayed in rows or columns. Entries within these dimensions are nested (by default) or appended.
- Measures are grouped together in the row or column area.
- Page fields sit above the report and allow you to filter the entire report to display data for one or more selections. (The page by dimension is the third dimension of the report.)

"Locked" Reports

Reports in the Viewer are "locked" in some situations. In a locked report, as explained here, you cannot rotate fields and measures to other dimensions.

If the report uses non-additive measures such as % of Stores Ever Selling, includes multiple time periods, displays overall rank, or includes a non-mutually exclusive field such as an appended field, custom grouping, or a multi-punch field, you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column. Specify the layout before running. The lock symbol shows the report is “locked.”

Page Totals in Locked Reports

The complexities associated with some of our advanced measures, along with capabilities we offer such as reporting with multiple time periods, require us to “lock” the report format in viewer. Locking the reports means a user who included a field in the page section could not see a total without creating a separate total report. When the Page Total option is checked, it will add a (Show All) option at the top of the page field drop-down for locked reports. Exceptions to this are the Outlet and Outlet Family fields. When these fields are added to the page, a (Show All) option is not generated.

- In Builder, you will need to check the Page Total checkbox within Layout to turn this option on. The default is set to off.
- If multiple page fields are displayed in Viewer and (Show All) is selected in one of them, the other will automatically switch to (Show All) as well.
• If one of the page fields is changed from (Show All) to a different selection, the other page field(s) will display the message Please Make Selection in red to indicate you need to make a selection within that particular field in order to see results. Otherwise the report will not display any results.
• You cannot have a combination of (Show All) and a specific value selected within multiple page filters.
• All Viewer Settings saved prior to adding Page Total into the report will be removed (i.e. sorting, Top N, hiding a column etc.). Any Viewer Settings saved after adding Page total into the report will be preserved by using Update Selections in the viewer and saving your report in the builder. This includes saving a specific value within Page Filters instead of ‘(Show All)’.
• If multiple page fields are included in the same report, only a single Total tab will be produced upon export. There will not be a total tab per combination as there is with unlocked reports today.
• You cannot use share of row.
• If you subset, the grand total and share values will not change based on the subset.
• There are restrictions on exports; see also Exporting.

How to turn on Page Total Viewer

Check the Page Total checkbox within Layout. The selected option will appear in Report Selections.

After you run the report in the Builder, a (Show All) option will appear at the top of the page field(s) drop-down within a locked report.
Suppression Indicators and Low Transaction Indicators

Suppression Indicators for POS Data

Suppressed POS data is indicated by colors. Colors show the level of suppression to give you an indication of which data is most impacted in order to guide usage. The suppression flag is based on value, no matter what measures are selected. Suppression flags are based on the lowest level brand/item field in the report.

NPD does not break out sales of brands or items in limited distribution or sold mainly through a single retailer (e.g., private label or exclusives) in order to protect retailer confidentiality. Suppressed volume is accumulated in a separate line, typically at the bottom of the report, and shown as "All Other/Suppressed." This process is referred to as "suppression." Suppression is determined on a period-by-period basis, meaning a single item may be suppressed in certain months and not others.

Suppression is applied to the benchmark columns in all ALR/RCR reports (Account Level Release and Retailer Comparison Reports).

Suppression colors:

- Less than 3% Suppressed (standard black)
- 3% to 15% Suppressed (light blue)
- More than 15% Suppressed (gray italics)

In this example:

- Total Retail sales of Brand 1 in Feb 2013 is in gray italics to indicate more than 15% suppression.
- The gray $0 in the Total Retail column for Brand 2 in Feb 2013 indicates more than 15% suppression. Because the number is 0, you know it is fully suppressed.
- Total Retail for Brand 3 is blue for both months to show 3% - 15% suppression.
- Total Retail numbers in black are less than 15% suppressed.

<table>
<thead>
<tr>
<th>Brand</th>
<th>Jan 2013</th>
<th>Feb 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cyberstore</td>
<td>Total Retail</td>
</tr>
<tr>
<td>Brand 1</td>
<td>55,266</td>
<td>$55,765</td>
</tr>
<tr>
<td>Brand 2</td>
<td>227</td>
<td>$2,485</td>
</tr>
<tr>
<td>Brand 3</td>
<td>50</td>
<td>$204,681</td>
</tr>
</tbody>
</table>

Low Transaction Warnings for Consumer Data

For consumer data, low transaction warnings are indicated by colors: Low Limit (less than 35) is red and High Limit (35 to 200) is blue.
Working with a Report in the Viewer (in Pro)

On the Viewer tab you can:

- Change the view by moving headings to a different orientation or by putting rows or columns in a different order. (See Also: Changing the View)
- Change the sort order. (See Also: Sorting the View)
- Filter the data. (See Also: Filtering the View)
- Display measures in rows or columns or change the order of the measures. (See Also: Changing Measures and Using the Fields List)
Changing the View

Dragging Fields to a Different Orientation

To drag a header to a different orientation:

1. Click and hold the left mouse button on a row header and drag it to a column. (Or drag a column to a row.)
   Two small white arrows will appear in the new position.
2. "Drop" the header where you want it to appear.
3. If you move the header to the area labeled "Drop Fields Here," you can filter the entire report by the data. This is the Page area. (See Also: Filtering the View)

Restrictions on Changing the View:

If the report uses non-additive measures such as % of Stores Ever Selling, includes multiple time periods, displays overall rank, or includes a non-mutually exclusive field such as an appended field, custom grouping, or a multi-punch field, you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column. Specify the layout before running. The lock symbol shows the report is “locked.”

Other restrictions in “locked” mode:

- Check the Page Total checkbox in Layout to add a (Show All) option within Viewer. The default is set to (Show All). Only one page filter value can be selected at a time. The label in the page field identifies the selection, and the data will subset on this value.
- You cannot use share of row.
- If you subset, the grand total and share values will not change based on the subset.
- There are restrictions on exports; see also Exporting.

Changing the Order of Rows or Columns

To rearrange the order of rows or columns:

- Position the mouse pointer over a row (or column) header, click and hold the left mouse button, and drag the column (or row) left or right. Two small white arrows show you where the row or column will be moved.

  You can also use the Fields list to rearrange headers to change the order. (See Also: Using the Fields List)
Hiding a Row or Column or Freezing Rows

**NOTE** This is not available in a locked report.

If a lock symbol is displayed, the report is locked, and you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time field when both measures and time are in the column.

<table>
<thead>
<tr>
<th>Action</th>
<th>To Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide a row or column</td>
<td>Right click in the &quot;token&quot; for a row or column and choose <strong>Hide</strong> from the context menu to hide the data. (The numbers will not change.)</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Hide" /></td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Show Field List" /></td>
</tr>
</tbody>
</table>
| "Unhide" a row or column | • Right click in the "token" heading and choose **Show Field List** from the context menu.  
  The field you hid will be shown in the pop-up window.  
  • Drag the field token to where you want it to display in the report. |
| Freeze rows          | To freeze rows so you can keep the rows on the screen while you scroll columns:  
  • Choose the **Freeze Rows** check box on the **Appearance** toolbar. |
| Unfreeze rows        | To "unfreeze" the rows, remove the check from the **Freeze Rows** checkbox under **Appearance** in the Viewer. |

Changing the Number of Rows on the Screen

To specify the number of rows to show on each screen of the report layout:

1. Choose **Appearance** on the Viewer toolbar.
2. Choose **Rows Per Page** and specify the number of rows to display.

Moving Totals to Top or Bottom

To put totals at the top or bottom of the report view or to turn them off:

1. Choose **Appearance** on the Viewer toolbar.
2. Select **Show Totals** and select **Top**, **Bottom**, or **None**.
Filtering the View

You can change the way data is filtered by choosing the Builder tab and changing the filters. You can also change the filter directly in the report layout and view the results immediately. These changes will not be saved with the report specifications.

Filtering a Column or Row

To change the data displayed in a column or row:

1. Click the filter symbol in the header to display the filter list.
2. Select the data you want to view in the list:
   a. Click and drag the dotted lower right corner of the text box to make it larger.
   b. Clear all the check marks by deselecting Show All.
   c. Select the checkbox next to each element of data that you want to view.
   d. Choose the OK button.

The data will change to show results for only the selected elements.

Using the Page Filter

To filter all the data in the report by the page filter:

1. Click the filter symbol in a header in the Page area (above the report) to display the filter list.
2. Select the data you want to view in the list:
   a. Clear all the check marks by deselecting the Show All checkbox.
   b. Select the checkbox next to each element of data that you want to view.
   c. Choose the OK button.

The data will change to show results for only the selected elements.

Sorting the View

Changing Sort Order from Ascending to Descending

To change the sort order of any row or column from ascending to descending, click the column/row header.

The sort arrow in the header always shows whether the data is sorted in ascending or descending order.
What Is Sort By Row or Column?

You can change the way data is sorted in the report by specifying the row on which you want to sort. (In order to sort by a row, you have to have at least one heading in the columns in addition to the measures.) You can also sort the rows by one of the measures.

- For example, this report shows sales of categories by month. Months are arranged in chronological order with month 2010-01 at the left.

- When the report is sorted by the row "LCD," month 2010-01 moves to fifth position, with ascending unit sales shown in that row. The double arrow shows the report is sorted by that row.

Sorting by Row or Column

To sort:

1. Right click in the row or column label to display the context menu.

2. Choose one of the sort options that are displayed.

To return to the original sort order:

1. Right click in the row to display the context menu.

2. Choose Remove Sorting from the menu.
Changing Measures

Changing the Order of the Measures

To change the order of the measures, move the mouse pointer to the area to the left above the row headers. Measure "tokens" will be displayed.

- Click and drag a measure "token" (such as Units or Currency) to a different position left or right.

To move the measures to the row or column area:

- Click and drag the Measures token to the row or column area.

**NOTE** You cannot move an individual measure to rows or columns. Use the Measures token to move all the measures to a different orientation (if there is more than one measure in the report).

Showing Top N, Share, Percent/Point Change, or Report Info

Choose Settings on the Viewer toolbar and select:

<table>
<thead>
<tr>
<th>Option</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Report Info</td>
<td>Display a window with information on the report settings.</td>
</tr>
</tbody>
</table>
| Top N               | Filter the data to show just the top results: specify the number of results to show, the field to rank on, and the measure to rank on. You can show the top N results by item or by percent.  
  - Item shows specified number of items. (If there are 1200 items, Top N Item=10 shows top 10.)  
  - Percent shows specified percent of the total items. (If there are 1200 items, Top N Percent = 10 shows top 120.)  
  A "Group Rank" column or row will be added showing the top N. Choose the Clear button in the Top N dialog box to remove the sorting. |
| Fields              | Show the Fields List where you can change the position of headings and measures. (See Also: Using the Fields List) |
| Share of Row        | Use this option to show row share. Then select the measure(s). For example, if you have year/month in your layout and value as the measure, you can display the value share for each month. If you want to show column share, use the Share and/or Share of Subtotal measures. (See Also: Working with Measures) |
| Percent/Point Change| Select the measure and indicate whether to show change as a percent/point or as an absolute number. Choose the Clear button in the dialog box to remove the percent/point change from the report. |
Using the Fields List

The **Fields List** in the Viewer is a quick tool for changing the positions of headings and measures.

### NOTE
Restrictions on Moving:

If the report uses non-additive measures such as % of Stores Ever Selling, includes multiple time periods, displays overall rank, or includes a non-mutually exclusive field such as an appended field, custom grouping, or a multi-punch field, you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column. Specify the layout before running. The lock symbol shows the report is “locked.”

Other restrictions in “locked” mode:

- Check the Page Total checkbox in Layout to add a (Show All) option within Viewer. The default is set to (Show All). Only one page filter value can be selected at a time. The label in the page field identifies the selection, and the data will subset on this value.
- You cannot use share of row.
- If you subset, the grand total and share values will not change based on the subset.
- There are restrictions on exports; see also Exporting.

### Moving Headings

To use the Fields feature to move headings to row, column, or page by:

1. Click **Settings** on the Viewer toolbar and choose the **Fields** option.
   
   The Fields dialog box will be displayed with headings and measures shown in their current location.
   
   - **Filter Area** is the Page area outside the report grid
   - **Column Area** and **Row Area** are in the report grid

   **NOTE** Data Area does not apply to headings.

2. Specify a position for headings by dragging a grouping "token" to the desired location.
3. Rearrange the order of the headings in each area if you wish.
4. Choose the **OK** button to see these changes in the report layout.

### Moving Measures

In the Fields dialog box change the order of the measures in the **Data Area**.

**NOTE** You cannot move individual measures to rows or columns. Instead, in the Viewer itself, move the **Measures** token. This moves all the measures to rows or columns.
Saving Viewer Format

There are three steps to saving your Viewer format changes:

Apply
Update
Save

Apply

Apply the format changes you want to make in Viewer (e.g., sorting, hiding columns, field rotation, and so on).

Before

After
Update

Click **Update Selections** within Viewer to add your Viewer format changes to Builder.

**NOTE**
A collapsed field view will not be supported as part of your saved Viewer changes.

Save

Choose **Save** (or **Save As**) to save the report with the Viewer format changes.
Notes:
The below changes made within Builder will clear your Viewer format changes (e.g., sorting, hiding columns, Top N).

<table>
<thead>
<tr>
<th>Builder Modification</th>
<th>Time Period Filters</th>
<th>Layout</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adding/removing/modifying a time</td>
<td>Adding/removing fields</td>
<td>Removing a measure(s)</td>
<td></td>
</tr>
<tr>
<td>period</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Changing orientation</td>
<td>Removing group and/or overall rank</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Moving fields up/down</td>
<td>Removing a benchmark(s)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Turning on/off subtotal(s), grand total, page total, and/or append</td>
<td>Changing measures from column to row or row to column</td>
<td></td>
</tr>
</tbody>
</table>

NOTE: Field rotation changes made in the Viewer (e.g., moving a field from row to page) will not be cleared when the above Builder changes are made.
This page intentionally left blank.
Pro--Using Clusters

Working with Clusters and Cluster Sets

About Clusters and Cluster Sets

- **Clusters**—New field created by selecting values from one field in the data source. (Equivalent to reclassified fields in NPD PowerView.)
- **Cluster Set**—A group of clusters make up a cluster set.

Clusters sets can be used as filters. Cluster sets and/or their component clusters can be used as headings in a report layout. (See Also: Rules for Clusters and Cluster Sets for how these should be used.)

Steps

1. Create a cluster set. (See Also: Creating Cluster Sets)
2. Create clusters in the cluster set. Include a cluster of Others if you want to see "others" in your report. (See Also: Creating Clusters)
3. Use the cluster set to filter data.
4. Use the cluster set, clusters, or both in the report layout. (See Also: Using Clusters and Cluster Sets in Reports)

   Cluster sets that you mark as Public are visible to everyone in your company with access to the same data in this data source. A private cluster set is available only to you.

Example

The cluster set here is "My Category View." Four clusters and an Others cluster are set up.
Data is filtered on the cluster set.

The clusters are added to the layout.

The report shows data for each cluster in the set and "others."
Creating Cluster Sets

Creating a New Cluster Set

To create a new cluster set:

1. Choose **Setup** in the left navigation panel and select **Cluster Setup**.

   Or

   Select a filter in Builder and choose **Cluster Setup** on the Workspace toolbar.

   The Cluster Setup tab will open.

2. Highlight a folder in the tree at the left and then a field.

3. Choose the **New** button.

4. Complete the New Cluster Set dialog box:
a. Enter a name and description (optional) for the cluster set.

b. Choose the Public checkbox if you want others in your company with access to the same data within the data source to be able to use it.

c. Choose the OK button.

**Next Step**

Proceed to add clusters to the cluster set and/or to use the cluster in reports.
Creating Clusters

Adding Clusters to a Cluster Set

**NOTE** All clusters must be part of a cluster set. (See Also: **Creating Cluster Sets**)

To create a cluster:

1. Choose **Setup** in the left navigation panel and select **Cluster Setup**.
   The Cluster Setup tab will open.

2. Highlight the cluster set in a field at the left.
3. Choose the **New Cluster** button on the Cluster toolbar.

   A cluster with the highlighted name "New Cluster" will be displayed in Selected Items.

4. Enter the cluster name.
5. Press the **Enter** key or choose the **Save** button.
6. Add or remove fields:
   - Search to locate the items you want.
   - Double click or highlight an item and use the buttons to move it into or out of the cluster.

   To add a cluster with a single item, you do not need to choose the **New Cluster** button or follow the steps above. Instead, highlight the item, and choose the **Add Cluster & Item** button.
7. To add additional clusters to the set, repeat steps 3 to 6 above. Be sure that you highlight the cluster to which you want to add items.

8. To include an Others cluster in the cluster set, choose the Others checkbox in the Cluster Setup toolbar.

9. Choose the Save button to save the cluster.
Editing and Deleting Cluster Sets

Modifying a Cluster Set

To change the name of a cluster set:

1. Choose Setup in the left navigation panel and select Cluster Setup.
2. Navigate to the cluster in the tree on the Cluster Setup tab.
3. Choose the Edit button on the toolbar.
4. In the dialog box, make changes to the cluster set properties.
5. Choose the OK button.

Changing a Cluster Set to Public or Private

Check the Public checkbox to make the cluster set visible to others in your company with access to the same data in this data source. If not checked, the cluster set is private.

* Once a cluster set is public, you cannot change the setting.

Deleting a Cluster Set

1. Open the cluster set. (See above.)
2. Choose the Delete button on the toolbar.
3. Confirm that you want to delete the cluster set.

Adding Clusters to a Cluster Set

Follow the steps in Creating Clusters to add a cluster to the set.
Editing and Deleting Clusters

Modifying a Cluster Name

To change the cluster name:
1. Navigate to the cluster.
   a. Choose **Setup** in the left navigation panel and select **Cluster Setup**.
   b. Drill down and highlight the cluster set name.
   c. Highlight the cluster at the right.
2. Choose the **Rename Cluster** button on the Cluster toolbar.
3. Edit the name and choose the **Save** button.

Adding or Removing from the Cluster

With the cluster selected, you can add or remove items just as you did in creating the cluster. (See Also: Creating Clusters)

Deleting a Cluster

1. Select the cluster.
2. Choose the **Delete Cluster** button on the Cluster toolbar.

Using Clusters and Cluster Sets in Reports

You can filter on cluster sets and use cluster sets or their component clusters in a report layout. (See Also: Rules for Clusters and Cluster Sets for how these should be used.)

Filtering by Cluster Sets

To filter using cluster sets:
1. In Report Options **Filter** drill down to the folder that contains the cluster set.
2. In the Workspace, choose the **View** button in the toolbar and select **Cluster Set** in the View Menu.
3. The Workspace will display the cluster sets for that field, including the name of the person who created each.
4. Add a cluster set to the Selected area.

   If you want to see Others in the report as part of the cluster, you need to select the Others checkbox when creating the clusters. (See Also: Creating Clusters for information on how to include an Others cluster in the cluster set.)

5. (Optional) Repeat this process for other cluster sets or clusters in other fields.

Using Cluster Sets or Clusters in a Report Layout

To use clusters or cluster sets in your report layout:

1. Drill down through the Layout section to a folder where you have filtered on a cluster set.

2. In the Workspace, you will see the cluster set you filtered on and its component clusters. They will be identified as, for example, "DMA Cluster" or "DMA Cluster Set."

3. Add the cluster set and/or cluster to the Selected area to include them in the layout.
Rules for Clusters and Cluster Sets

Keep the following in mind when working with clusters and cluster sets:

Filtering

- Cluster sets can be used as filters. Individual clusters cannot be used as filters.
- You can filter on one cluster set per field.

Layout

- Once you have filtered on a cluster set, you can use it in your report layout.
- If you filter on a cluster set, you can use its clusters in the report layout.
- If you filter on a cluster set in a field, you cannot select among the clusters specifying your layout. (For example, if you filter on a Category cluster set with three clusters in it, and you put Category clusters in the report, you will see all three in your report.)
- If you have an Others cluster in the cluster set, it will appear in the layout when you add the clusters. Others will be included in the totals for the cluster set.
Pro--Using Custom Groupings

Working with Custom Groupings

About Custom Groupings

Custom groupings allow you to combine values from a number of fields into one field that you can use to filter or group data. You can allow others to see and use your custom groupings.

NOTE

Restrictions on using Custom Grouping:

If the report uses non-additive measures such as % of Stores Ever Selling, includes multiple time periods, displays overall rank, or includes a non-mutually exclusive field such as an appended field, custom grouping, or a multi-punch field, you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column. Specify the layout before running. The lock symbol shows the report is “locked.”

Other restrictions in “locked” mode:

- Check the Page Total checkbox in Layout to add a (Show All) option within Viewer. The default is set to (Show All). Only one page filter value can be selected at a time. The label in the page field identifies the selection, and the data will subset on this value.
- You cannot use share of row.
- If you subset, the grand total and share values will not change based on the subset.
- There are restrictions on exports; see also Exporting.

One Field or More than One

- **Clusters** are built from one field. For example, within the field DMA, you could create a cluster for all the DMAs in Michigan.

  Once you have picked a value for a cluster, you cannot use it in another cluster in that cluster set. (See Also: Working with Clusters and Cluster Sets)

- **Custom groupings** can use several fields and reuse values in more than one custom grouping. For example, you can create a custom grouping for plasma TVs and brands A, B, C and screen size over 50 inches. Then you can create another grouping where you use the same brands and screen size but for LCD TVs.
**Steps**

1. Create a new custom grouping, specifying the fields you want included. (See Also: [Creating a Custom Grouping](#))
2. Specify values from each field. (See Also: [Specifying Values for a Custom Grouping](#))
3. Use the custom grouping in reports. When you do this, you have the option of including an **Others** custom grouping that includes All Others. (See Also: [Using Custom Groupings in Reports](#))

**(Optional) Make a Custom Grouping Public**

If you wish your custom grouping to be available to others in your company with access to the same data in the data source, you can make it public. Once a custom grouping is public, anyone can use it in their reports. If you delete the custom grouping, you may affect someone else's report.

You cannot make a custom grouping public until you have completed the design. You must create the custom grouping and specify the values. At that point, the status for the custom grouping will be "Complete."

1. On the Custom Grouping tab, select a custom grouping under **Mine** and choose the **Edit** button.
2. In the Add/Edit Custom Group dialog box, choose the **Make Public** button.

**Creating a Custom Grouping**

Custom groupings allow you to combine values from a number of fields into one field that you can use to filter data or in a report layout. To begin, name your custom grouping and select the filters and attributes that will make up the grouping.

* You can edit the custom grouping to add or remove filters and attributes later if needed.

**Start a Custom Grouping**

1. Choose **Setup** in the left navigation panel and select **Custom Grouping**.

   The Custom Grouping tab will open. On the tab all your custom groupings, whether private or ones you shared within your company and data source, display in the list under **Mine**. Other users' shared custom groupings display under **Public**.
2. Under **Mine**, choose the **New** button. The Add/Edit Custom Group dialog box will be displayed.

3. Enter a name for the custom group and an optional description.

   ✴ Until the custom grouping is complete, the status will be displayed as "Not Complete."

4. Choose the filters you will need for the custom grouping by highlighting them and choosing the **Select** button. (You can use the **Search** box.)

5. Click the **Attributes** tab and choose a category to display attributes for that category in the Available list.

   ✴ Search by entering the first few characters.

6. Select the attributes for that category that you wish to include in your custom grouping by highlighting them and choosing the **Select** button.

7. Choose the **OK** button.
Next Step:

Select the specific filters and attributes you want in each field. (See Also: Specifying Values for a Custom Grouping)

Specifying Values for a Custom Grouping

Once you have created a custom grouping, you can add combined fields under that custom grouping. Then you can filter on any or all of these combined fields in a report.

- You create the custom grouping on the left side of the Custom Grouping tab under Custom Groups. (See Also: Creating a Custom Grouping)
- Enter details in the right pane under Custom Group Detail.

Enter Custom Group Detail

1. On the Custom Grouping tab, highlight the custom grouping under Mine. Click the Add New button.

   ![Custom Grouping Tab]

2. A set of columns will be displayed, one for the label and one for each filter and attribute you selected for the custom grouping.

   **NOTE** The order of the columns is the order in the Add/Edit Custom Group dialog box.

3. In the first column, enter a name for the first combined field.

   ★ If you give two or more fields the same name, they will function like "OR" statements.

4. Click in each of the filter columns. When you click in the column, a dialog box will be displayed for that filter. Select the values that you want to include and click the OK button.
5. For each attribute column, click in the column and select the attributes you want from the list that will be displayed. Choose the **OK** button.
   
   Use the **Shift** key or the **Control** key plus a mouse click to select multiple values.

6. Repeat these steps as needed to add any additional combined fields to the custom grouping.

7. Choose the **Save** button.

**Next Step:**

See Also: [Using Custom Groupings in Reports](#)

**Using Custom Groupings in Reports**

After you have created a custom grouping, you can filter on the custom grouping, on either some or all of the combined fields in the grouping. You can also use the custom grouping as a row or column in a report. You do not have to filter on the custom grouping in order to use it in your report layout.

**Filter on Custom Groupings**

1. On the **Builder** tab, select **Custom Grouping** under Filter in Report Options.
   
   The tree expands to show the available custom groupings.
2. Highlight the custom grouping.

3. In the Workspace, select the combined fields you wish to use as filters and move them to the selected area.

**NOTE** The **Others** custom grouping is automatically available for all custom groupings. Add it to include an "all others" custom grouping.

**Use Custom Groupings in the Report Layout**

1. Select **Custom Grouping** under Layout in Report Options.
   
The Workspace shows available custom groupings.

2. Highlight the custom grouping(s) you wish to use. Move it (them) to the selected area.
   
The report will show all the combined fields in this custom grouping that you selected as filters.

**NOTE** Restrictions with Custom Groupings:

If the report uses non-additive measures such as % of Stores Ever Selling, includes multiple time periods, displays overall rank, or includes a non-mutually exclusive field such as an appended field, custom grouping, or a multi-punch field, you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column. Specify the layout before running. The lock symbol shows the report is “locked.”

Other restrictions in “locked” mode:

- Check the Page Total checkbox in Layout to add a (Show All) option within Viewer. The default is set to (Show All). Only one page filter value can be selected at a time. The label in the page field identifies the selection, and the data will subset on this value.

- You cannot use share of row.

- If you subset, the grand total and share values will not change based on the subset.

- There are restrictions on exports; see also Exporting.

**Editing a Custom Grouping**

**Edit the Properties or Make the Custom Grouping Public**

To change the name, description, or included fields and attributes:

1. On the Custom Grouping tab, select a custom grouping under **Mine** and choose the **Edit** button.

2. In the Add/Edit Custom Group dialog box, make your changes. (See Also: Creating a Custom Grouping)

3. (Optional) Choose the **Make Public** button.

4. Choose the **OK** button.
**Edit the Details**

1. On the Custom Grouping tab, highlight the custom grouping under **Mine**. Details will display at the right.
2. Make changes in the columns under Custom Group Detail. (See Also: Specifying Values for a Custom Grouping)
3. Choose the **Save** button.

**Export Custom Group Definitions**

After you save your custom Group, you can export your custom group definitions for easy reference by clicking Export.

1. On the Custom Grouping tab, click **Export**.

![Custom Grouping Tab](image)

**NOTE** If you do not see the Export option, click on the menu button to access it.
2. The first worksheet contains all the custom column names created within the Custom Group.

<p>| | | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dress &amp; Casual</td>
<td>Action</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Total Dress &amp; Casual</td>
<td>(OR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Total Dress</td>
<td>(OR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Dress Shoes/Sneaker</td>
<td>(OR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Dress Sandals</td>
<td>(OR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Dress Boots</td>
<td>(OR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Total Casual</td>
<td>(OR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Casual Shoes/Sneaker</td>
<td>(OR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Casual Sandals</td>
<td>(OR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Casual Boots</td>
<td>(OR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Each custom column definition is then broken out into separate worksheets.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Custom Column</td>
<td>Sub Class</td>
</tr>
<tr>
<td>2</td>
<td>Total Dress &amp; Casual</td>
<td>Dress</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Evening</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Casual</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Casual Athletic</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>Cold Weather Casual Boots</td>
</tr>
</tbody>
</table>

Delete the Custom Grouping

Select the custom grouping on the left of the Custom Grouping tab and choose the **Delete** button. You will be warned if you have made this group public.
Reports--Running

Working with Reports

Report Types

You can quickly and easily get access to your data through report templates designed by NPD. These commonly used report types have a design that allows you to pull in the specific data that meets your needs.

NOTE: All Reports will be displayed on the Library tab. All Reports lists the reports that you have saved, including standard reports and public reports that others in your company have saved for this data source.

If you have access to Pro, you will see all the Pro customization options in Builder when you open a standard report template. (See Also under Using Pro: Creating a New Report, Choosing Filters, Layout, Measures, Viewing Cubes)

Working with and Running Reports

Use three tabs in the application to customize and run reports:

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Library" /></td>
<td>In Standard Templates on the Library tab, select a report.</td>
</tr>
<tr>
<td><img src="image" alt="Builder" /></td>
<td>In the Builder, customize the choices and run the report.</td>
</tr>
<tr>
<td><img src="image" alt="Viewer" /></td>
<td>View the report in the Viewer.</td>
</tr>
</tbody>
</table>

(See Also: Working with Standard Templates)

Working with Standard Templates

Standard Templates are commonly used report types. These reports are designed by NPD and made available to you under Standard Templates.
Using a Standard Template Report

To use a standard template:

1. View the list of reports in Standard Templates.

2. Click on a report name and choose the Open button.
   The report will open on the Builder tab.

3. On the Builder tab, the Report Options tree will show customization options for this report type.
   Make selections from the filter section of the tree. (See Also: Choosing Report Filters, Searching in Report Filters, Working with Report Time Filters)

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4. When the report is ready to run, the Notification Center will show the message "Report is ready to run." If there are other messages in the Notification Center, click the underlined text to jump to the Report Options tree to correct the issue.

5. You can change the measures if this option is available for the report. (See Also: Choosing Report Measures)

6. Run the report using the Run button.

Viewing and Changing a Report

See Also: Viewing Reports

Exporting and Printing

See Also: Printing and Exporting Reports

Saving a Report

If you want to save the filters you have set, use the Save As button on the Builder and save the report in your folder. (See Also: Running and Saving a Report)

Choosing Report Filters

For Standard Templates, you can set filters that determine what data to report on.

• At a minimum, you must filter on a specific time period.

Selecting Filters

When you open a report, its criteria are shown on the Builder tab. Specify filters to subset the data:

1. Drill down through filters in the Filter section of Report Options.
2. When you get to an item that no longer expands, the Workspace will display the criteria available for that filter.

   For some criteria, you have to make a selection from one filter set before you can see additional options. Example: Select Brand before selecting an Item within the Brand.

3. In the Workspace, select filter criteria by moving them from the available top area to the selected area below. (See Also: Workspace and Searching in Report Filters)
4. Repeat these steps to add additional filters as required.

**Selecting Time Periods**

- You should filter the data for a specific time period. (See Also: *Working with Report Time Filters* )
- You have the option of comparing that data to the previous year or viewing a trend. (See Also: *Comparing over Time in a Report* )

**Searching in Report Filters**

**Viewing Filters in the Workspace**

When more than one screen of filter results is displayed, you can navigate quickly through the results. Click the *Page x of x* button and:

- Move the slider to navigate through the report.

**And/Or**

- Change the number of rows to display per page.

![Page 1 of 9](image)

Specify the number of rows to display by default in Preferences. (See Also: *Setting Preferences* )

**Searching in the Workspace**

To make locating specific filters easier, you can use the function in the section of the Builder tab.

Search

To search:
1. Enter text in the **Search** text box.

   - You do not have to press **Enter** or click the magnifying glass for the matches to display; they begin to display when you have entered two characters.

   Use the * wildcard to help find matches. s* returns all entries starting with "s." *sys returns all entries with "sys" anywhere in the text.

2. Select from the results. The selections display in the top pane of the Workspace, where you can double click to move them to the selected pane.

3. To clear the **Search** box, choose the X.

### Working with Report Time Filters

#### About Time Period Filters

The **Filter** section of **Report Options** is where you can filter the data for the time period you need to report on. You can include as many as three time periods in your report. (The number you can include depends on your subscription. Batch the report if you need more time periods.) For example, you can display sales data for the current month and also total sales for a 3-month period.

For monthly data, you can choose from the time period options offered and also create your own custom time periods. Custom periods show combined data for up to 12 months.

   - Until a time period is selected, the Notification Center will display a reminder.

#### Selecting Time Periods

To select the time period filter for your report:

1. In Report Options Filter, choose the **Time Period** option and **Time Period(s)** under it.

2. In the Workspace first select the **Time Scale**.
Your choices for monthly datasets are shown in the Time Scale drop-down menu and table.
<table>
<thead>
<tr>
<th>Time Scale Choice</th>
<th>Filters On...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month</td>
<td>A single month—the current month or any other month for which data is available.</td>
</tr>
<tr>
<td>3 Months (Combined)</td>
<td>A 3-month period.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 3-month total.</td>
</tr>
<tr>
<td>6 Months (Combined)</td>
<td>A 6-month period.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 6-month total.</td>
</tr>
<tr>
<td>12 Months (Combined)</td>
<td>A 12-month period.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 12-month total.</td>
</tr>
<tr>
<td>24 Months (Combined)</td>
<td>A 24-month period.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 24-month total.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 36-month total.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a 48-month total.</td>
</tr>
<tr>
<td>Year-to-Date Calendar (Combined)</td>
<td>The period from January to the end date you select.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a total for that period.</td>
</tr>
<tr>
<td>Year-to-Date Retail (Combined)</td>
<td>The period from February to the end date you select.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown as a total for that period.</td>
</tr>
<tr>
<td>Year-to-Date Calendar (Monthly Trend)</td>
<td>The period from January to the end date you select.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown by month.</td>
</tr>
<tr>
<td>Year-to-Date Retail (Monthly Trend)</td>
<td>The period from February to the end date you select.</td>
</tr>
<tr>
<td></td>
<td>Data will be shown by month.</td>
</tr>
<tr>
<td>Custom Months</td>
<td>Displays a total for the number of months you specify, ending on the End Month you select.</td>
</tr>
<tr>
<td></td>
<td>When you select this option, a number box will be displayed where you can specify the number of months.</td>
</tr>
<tr>
<td>Custom Year-to-Date</td>
<td>Create a custom Fiscal/Retail year that begins on the start month you select.</td>
</tr>
<tr>
<td></td>
<td>Auto Update automatically refreshes reports with new monthly data as it becomes available.</td>
</tr>
<tr>
<td>Custom Period-to-Date</td>
<td>Select any start month and report up to the current period.</td>
</tr>
<tr>
<td></td>
<td>Auto Update automatically refreshes reports with new monthly data as it becomes available.</td>
</tr>
</tbody>
</table>
Your choices for weekly datasets are shown in the **Time Scale** drop-down menu and table below.

<table>
<thead>
<tr>
<th>Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 Weeks (Combined)</td>
</tr>
<tr>
<td>5 Weeks (Combined)</td>
</tr>
<tr>
<td>13 Weeks (Combined)</td>
</tr>
<tr>
<td>26 Weeks (Combined)</td>
</tr>
<tr>
<td>52 Weeks (Combined)</td>
</tr>
<tr>
<td>Year-to-Date Calendar (Combined)</td>
</tr>
<tr>
<td>Year-to-Date Calendar (Trend)</td>
</tr>
<tr>
<td>Custom Week(s)</td>
</tr>
<tr>
<td>Custom Year-to-Date</td>
</tr>
<tr>
<td>Custom Period-to-Date</td>
</tr>
<tr>
<td>Month-to-Date</td>
</tr>
<tr>
<td>Time Scale Choice</td>
</tr>
<tr>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Week</td>
</tr>
<tr>
<td>Quad Weeks (Combined)</td>
</tr>
<tr>
<td>5 Weeks (Combined)</td>
</tr>
<tr>
<td>13 Weeks (Combined)</td>
</tr>
<tr>
<td>26 Weeks (Combined)</td>
</tr>
<tr>
<td>52 Weeks (Combined)</td>
</tr>
<tr>
<td>Year-to-Date Calendar (Combined)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Year-to-Date Calendar (Trend)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Custom Year-to-Date</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Custom Period-to-Date</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Month-to-Date</td>
</tr>
</tbody>
</table>

- To display a custom period, choose the **Custom Months (or Custom Weeks)** option from the **Time Scale** drop-down menu:
Click here to view the full Time Periods Grid for Monthly and Weekly time period options.

3. (If you select Custom Months) Use the arrows to select the number of months from 1 to 12.
   - If you select Custom Weeks, use the arrows to select the number of weeks from 1 to 52.

4. Select the End Month or End Week from among the possible choices in the drop-down box, or choose Auto Update.
   - If you choose Auto Update, the most recent month or week will be used as the end date every time the report is run. The report will update when a new month (or week) of data is available and you run the report again.
   - If you pick a specific end date, that date will be used each time the report is run.

(Optional) Compare to previous periods as a Trend report or a comparison to Year Ago. (See: Comparing Over Time)

5. Choose the Add button to move your time period to the Selected area.
   (Optional) Choose additional time periods for your report.

   If you include multiple time periods, the report will be "locked," and you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column.
Enhanced Time Periods in DecisionKey

Enhanced time period functionality has been added to DecisionKey to increase flexibility for users, improving user experience when creating time periods for monthly and weekly data sources. While new functionality was added, essential DecisionKey features work as they did prior to the upgrade:

- All existing reports function as they did prior to the update.
- Time period selection screens are relatively unchanged.

Reports Created with Enhanced Time Periods (Monthly & Weekly)

Custom Fiscal/Retail Year-to-Date with Auto Update (Combined)
### Custom Fiscal/Retail Year-to-Date with Auto Update (Individual)

#### Time Period(s)

<table>
<thead>
<tr>
<th>Time Scale:</th>
<th>Custom Year-to-Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Month:</td>
<td>August</td>
</tr>
<tr>
<td></td>
<td>Aug 2016 - Sep 2016</td>
</tr>
<tr>
<td>Display As:</td>
<td>Individual</td>
</tr>
<tr>
<td>Comparison:</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Year Ago</td>
</tr>
<tr>
<td></td>
<td>Trend</td>
</tr>
<tr>
<td></td>
<td>Rolling Trend</td>
</tr>
<tr>
<td>Number of Comparison Periods:</td>
<td>1 Aug 2015 - Sep 2015</td>
</tr>
<tr>
<td>Calculate Percent/Point Change:</td>
<td>VS Year Ago</td>
</tr>
</tbody>
</table>

#### Measures

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Dollars</td>
<td>$7,009,956,235</td>
<td>$7,709,729,403</td>
<td>$6,766,472,585</td>
<td>$7,619,520,951</td>
<td>-3.5</td>
<td>-1.2</td>
</tr>
<tr>
<td></td>
<td>$1,974,778,419</td>
<td>$1,765,858,874</td>
<td>$1,804,802,295</td>
<td>$1,690,466,596</td>
<td>-8.6</td>
<td>-4.3</td>
</tr>
<tr>
<td></td>
<td>$109,383,744</td>
<td>$122,717,047</td>
<td>$118,243,968</td>
<td>$121,662,569</td>
<td>8.1</td>
<td>-0.9</td>
</tr>
<tr>
<td></td>
<td>$98,202,648</td>
<td>$107,352,420</td>
<td>$104,680,413</td>
<td>$106,263,537</td>
<td>6.6</td>
<td>-1.0</td>
</tr>
<tr>
<td></td>
<td>$7,781,850</td>
<td>$10,878,419</td>
<td>$7,291,652</td>
<td>$8,191,128</td>
<td>-6.3</td>
<td>-24.7</td>
</tr>
<tr>
<td></td>
<td>$3,399,245</td>
<td>$4,486,208</td>
<td>$6,271,903</td>
<td>$7,207,904</td>
<td>84.5</td>
<td>60.7</td>
</tr>
</tbody>
</table>
Custom Period-to-Date with Auto Update (Combined)

**Time Period(s)**

- **Time Scale:** Custom Period-to-Date
- **Start Month:** January 2013
- **Display As:** Combined
- **Comparison:** None
- **Number of Comparison Periods:** 0
- **Calculate Percent/Point Change:** None

**Measures**

<table>
<thead>
<tr>
<th>Measure</th>
<th>Dollars</th>
<th>Dollar Share</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>45 Months</td>
<td>$336,666,627,794</td>
<td>100.0</td>
<td>6,252,657,672</td>
</tr>
<tr>
<td>(Jan'13 - Sep'16)</td>
<td>$71,770,905,789</td>
<td>21.3</td>
<td>232,001,925</td>
</tr>
<tr>
<td>45 Months</td>
<td>$4,921,328,469</td>
<td>1.5</td>
<td>57,122,099</td>
</tr>
<tr>
<td>(Jan'13 - Sep'16)</td>
<td>$4,296,693,876</td>
<td>1.3</td>
<td>49,382,244</td>
</tr>
<tr>
<td>45 Months</td>
<td>$477,800,056</td>
<td>0.1</td>
<td>2,383,678</td>
</tr>
<tr>
<td>(Jan'13 - Sep'16)</td>
<td>$146,834,237</td>
<td>0.0</td>
<td>5,356,177</td>
</tr>
</tbody>
</table>
Custom Period-to-Date with Auto Update (Individual)

Time Period(s)

Time Scale: Custom Period-to-Date
Start Month: January 2013
Display As: Individual
Comparison: None
Number of Comparison Periods: 0
Calculate Percent/Point Change: None

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
<td>$2,948,246,776</td>
</tr>
<tr>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

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## Rolling Trend

### Time Period(s)

- **Time Scale:** 12 Months (Combined)
- **End Month:** Auto Update
- **Display As:** Combined
- **Comparison:** None, Year Ago, Trend, Rolling Trend
- **Number of Comparison Periods:** 4
- **Calculate Percent/Point Change:** VS Prior Period

### Measures

<table>
<thead>
<tr>
<th>Measures</th>
<th>Time Period(s)</th>
<th>Dollars</th>
<th>Dollars Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>12 Months (Jun’15 - May’16)</td>
<td>$88,904,651,679</td>
<td>-0.3</td>
</tr>
<tr>
<td></td>
<td>12 Months (Jul’15 - Jul’16)</td>
<td>$88,670,522,652</td>
<td>-0.2</td>
</tr>
<tr>
<td></td>
<td>12 Months (Aug’15 - Aug’16)</td>
<td>$88,523,559,461</td>
<td>-0.3</td>
</tr>
<tr>
<td></td>
<td>12 Months (Sep’15 - Sep’16)</td>
<td>$88,279,855,811</td>
<td>-0.1</td>
</tr>
<tr>
<td></td>
<td>12 Months (Oct’15 - Oct’16)</td>
<td>$88,189,647,359</td>
<td>-0.2</td>
</tr>
<tr>
<td></td>
<td>12 Months (Nov’15 - Nov’16)</td>
<td>$88,120,152,662</td>
<td>-0.1</td>
</tr>
<tr>
<td></td>
<td>12 Months (Dec’15 - Dec’16)</td>
<td>$1,915,734,876</td>
<td>0.7</td>
</tr>
<tr>
<td></td>
<td>12 Months (Jan’16 - Jan’17)</td>
<td>$1,922,670,316</td>
<td>0.4</td>
</tr>
<tr>
<td></td>
<td>12 Months (Feb’16 - Feb’17)</td>
<td>$1,929,148,080</td>
<td>0.3</td>
</tr>
<tr>
<td></td>
<td>12 Months (Mar’16 - Mar’17)</td>
<td>$1,928,059,197</td>
<td>-0.1</td>
</tr>
<tr>
<td></td>
<td>12 Months (Apr’16 - Apr’17)</td>
<td>$1,905,006,021</td>
<td>1.1</td>
</tr>
<tr>
<td></td>
<td>12 Months (May’16 - May’17)</td>
<td>$187,860,685</td>
<td>0.2</td>
</tr>
<tr>
<td></td>
<td>12 Months (Jun’16 - Jun’17)</td>
<td>$188,252,593</td>
<td>-0.3</td>
</tr>
<tr>
<td></td>
<td>12 Months (Jul’16 - Jul’17)</td>
<td>$187,762,395</td>
<td>-1.4</td>
</tr>
</tbody>
</table>
### Trend vs Last Year

**Time Period(s)**

- **Time Scale:** Custom Months
- **End Month:** Auto Update
- **Display As:** Combined
- **Comparison:** None
- **Number of Comparison Periods:** 1
- **Calculate Percent/Point Change:** VS Year Ago

**Measures**

<table>
<thead>
<tr>
<th>Measures</th>
<th>Time Period(s)</th>
<th>Dollars</th>
<th>Dollars Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Months (Jun'15 - Jul'15)</td>
<td>2 Months (Aug'15 - Sep'15)</td>
<td>2 Months (Jun'16 - Jul'16)</td>
<td>2 Months (Aug'16 - Sep'16)</td>
</tr>
<tr>
<td>$13,702,324,447</td>
<td>$14,719,685,637</td>
<td>$13,321,012,229</td>
<td>$14,385,993,535</td>
</tr>
<tr>
<td>$3,141,259,533</td>
<td>$3,740,637,292</td>
<td>$3,055,643,570</td>
<td>$3,495,268,891</td>
</tr>
<tr>
<td>$302,686,595</td>
<td>$232,100,791</td>
<td>$333,127,130</td>
<td>$239,906,536</td>
</tr>
<tr>
<td>$275,409,594</td>
<td>$205,555,069</td>
<td>$295,261,990</td>
<td>$210,943,950</td>
</tr>
<tr>
<td>$20,225,273</td>
<td>$18,660,269</td>
<td>$22,571,845</td>
<td>$15,482,779</td>
</tr>
<tr>
<td>$7,051,828</td>
<td>$7,885,453</td>
<td>$15,293,296</td>
<td>$13,479,808</td>
</tr>
</tbody>
</table>
Comparing over Time in a Report

About Comparing over Time

You can specify comparisons:

- Against the same period a year ago.
- Against a set of successive periods -- Trend.
- Against sales in overlapping cycles -- Rolling Trend.

These choices are available in the Workspace.

* If there is not enough data available to show a comparison, the option(s) will be grayed out.

Comparing Data

To compare over time:

1. In the Filter section, select Time Period and then Time Period(s) underneath.
2. In the Workspace, select a Time Scale, End Month/Week, or Auto Update. (See Also: Working with Report Time Filters)
3. With the Display As feature, you can select how you want to display the results - either Individual, by individual weeks or months, or Combined, as aggregated totals of selected time periods.
4. Choose how you want to compare your selected period from the options in the Workspace.
Reports—Running

<table>
<thead>
<tr>
<th>Option</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comparison</td>
<td>None - Do not do any comparison.</td>
</tr>
<tr>
<td></td>
<td>Year Ago - Compare to the selected time period a year ago. (Example, compare 3 months to the same 3 months a year ago.)</td>
</tr>
<tr>
<td></td>
<td>• Always available as long as data is available.</td>
</tr>
<tr>
<td></td>
<td>Trend - Compare to successive periods in the past. (Example, compare 3 months to the previous 3 months.)</td>
</tr>
<tr>
<td></td>
<td>• Available only if the selected option for Display As is Combined, or Individual and # of months/weeks is = 1, and data is available.</td>
</tr>
<tr>
<td></td>
<td>Rolling Trend - Compare sales in overlapping cycles. For instance, apply rolling averages to selected time periods (i.e., 3, 6, or 12 months), as well as year-ago percent change on trended periods.</td>
</tr>
<tr>
<td></td>
<td>• Available only if the selected option for Display As is Combined, and data is available.</td>
</tr>
<tr>
<td>Number of Comparison Periods</td>
<td>Select the number of periods to include in the comparison.</td>
</tr>
<tr>
<td></td>
<td><img src="1.png" alt="Arrow" />  Click the top arrow in the button to increase the number; the lower arrow to decrease the number.</td>
</tr>
<tr>
<td>Calculate Percent/Point Change</td>
<td>Show the percent or point change between periods.</td>
</tr>
</tbody>
</table>

5. Add the period to your filters. (If you are adding multiple periods, you can include a comparison in any or all of them.)

The report will show the most recent comparison period followed by the next older period and so on. The latest period is last.

Examples

You pick a Time Period filter of 3 Months (Combined) with an end date April 2011.

- If you select the "Year Ago" comparison and 1 comparison period, you will see data for February to April (3 months) for 2011 and for February to April 2010.
- If you select the "Trend" comparison and 4 comparison periods, you will see data for the period February to April 2011 and for the previous 3 months—November 2010 to January 2011, and for the 3 months August to October 2010, and so on.
- If you select “Rolling Trend” comparison and 4 comparison periods, you will see data for the period February to April 2011, followed by January to March 2011, December 2010 to February 2011, and so on.

For more examples on Rolling Trend, see the DecisionKey Enhanced Time Periods Reference Guide.
Choosing Report Measures

If the standard template allows you to change measures, use the Report Options Measures tree to do this. You can also show rank in your report.

Choosing Measures

For each measure that you want in your report, follow these steps:

1. Select a measure type in the Measures section. (Measures are grouped by Units / Currency, Pricing, and so on.)

2. In the Workspace for measures, select measures by moving them from the available top area to the selected area below. (See Also: Workspace)

3. Use the order arrows to move measures up or down to change the display of measures in the report.

4. Choose the Column or Row radio button to determine whether the measures will be displayed in columns or rows. All measures are by default placed in columns, but you can change this.

   **NOTE** If you choose a currency measure, the currency displayed will depend on the data source. For U.S. data sources, for example, the currency will be Dollars. For France, for example, you will see Euros in the report.

Displaying Rank

(Optional) To display a column or row with a rank order number, use the options in the Workspace.

There are two kinds of rank:
• Overall Rank -- Overall Rank shows the unique rank no matter what order the fields are in. There is one set of overall rank for the entire report.

• Group Rank -- Group Rank shows the position of each value within its group. You might show Group Rank of each brand within its category, or each item within its brand, for example. There is a set of group ranks for each group in the report.

To display overall or group rank:

1. Select the Group Rank check box to include a Group Rank Measure Name row or column in your report. You can select more than one measure for group rank.

   And/Or

2. Select the Overall Rank radio button for one measure. This will add an Overall Rank Measure Name row or column. You can select only one overall rank.

   **NOTE** Overall Rank is available for Units and Currency measures. If Overall Rank is grayed out, it is not available for that measure. In this example, Overall Rank is not available for the Unit Share measure.
When you include overall rank in the report, the report will be locked and you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column.

Using Share Measures in a Report

About Share Measures

Share and Share of Subtotal measures are available in the Measures tree.

- Share is a percentage of the grand total.
- Share of Subtotal shows the percentage based on the subtotal.

Including Share Measures

To use a share measure in a standard template:

1. Select the Units / Currency measure type in the Measures section.
2. In the Workspace, select share measures such as Unit Share or Unit Share of Subtotal by moving them from the available top area to the selected area below.

---

### Available Units / Currency

<table>
<thead>
<tr>
<th>Name</th>
<th>Data Segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dollars</td>
<td>Units / Currency</td>
</tr>
<tr>
<td>Dollar Share</td>
<td>Units / Currency</td>
</tr>
<tr>
<td>Dollar Share of Subtotal</td>
<td>Units / Currency</td>
</tr>
<tr>
<td>Dollar Horz Share</td>
<td>Units / Currency</td>
</tr>
<tr>
<td>Dollar Horz Share of Subtotal</td>
<td>Units / Currency</td>
</tr>
</tbody>
</table>
Example

In this example, Unit Share and Unit Share of Subtotal are used.

- 85.6 is the Unit Share for 2D LCD TVs in Jan 2013—the percent that 2D LCD sales represents of the grand total of all televisions in Jan 2013. (Not all report rows are shown in the example screen.)

- 92.2 is the share that 2D LCD sales represents of the subtotal for LCD TVs in that month. (The other 7.8 was 3D LCD TVs.)

<table>
<thead>
<tr>
<th></th>
<th>Jan 2013</th>
<th></th>
<th></th>
<th>Feb 2013</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Units</td>
<td>Unit</td>
<td>Unit</td>
<td>Units</td>
<td>Unit</td>
<td>Unit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Share</td>
<td>Share</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Grand Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2,861,695</td>
<td>100.0</td>
<td></td>
<td>2,848,438</td>
<td>100.0</td>
</tr>
<tr>
<td>LCD TV Total</td>
<td></td>
<td>2,857,088</td>
<td>99.9</td>
<td></td>
<td>2,651,159</td>
<td>98.1</td>
</tr>
<tr>
<td>LCD TV</td>
<td>2D LCD TV</td>
<td>2,444,187</td>
<td>85.6</td>
<td>92.2</td>
<td>2,442,577</td>
<td>87.1</td>
</tr>
<tr>
<td></td>
<td>3D LCD TV</td>
<td>204,901</td>
<td>7.3</td>
<td>7.4</td>
<td>168,782</td>
<td>5.9</td>
</tr>
<tr>
<td>Plasma TV Total</td>
<td></td>
<td>204,506</td>
<td>7.1</td>
<td>7.1</td>
<td>197,279</td>
<td>6.9</td>
</tr>
<tr>
<td>Plasma TV</td>
<td>2D Plasma TV</td>
<td>132,048</td>
<td>4.6</td>
<td>64.5</td>
<td>151,584</td>
<td>5.3</td>
</tr>
<tr>
<td></td>
<td>3D Plasma TV</td>
<td>72,359</td>
<td>2.3</td>
<td>35.5</td>
<td>45,695</td>
<td>1.6</td>
</tr>
</tbody>
</table>

**NOTE** These are column share measures. To display share of row, use the Settings tool on the Viewer toolbar. (See also: Changing the Measures in a Report)

Setting Display Options in Reports

These choices are optional; the report will display with default values if you do not make choices.

To set options:

1. Select Display Settings in Report Options.
2. Choose the Custom Text option.

**NOTE** These custom header and footer will originally display any you have set with the Preferences tool on the Toolbar. Change the text to override the preferences for this report. (See Also: Setting Preferences)
Running and Saving a Report

Running a Report

1. When you have finished selecting filters for a report, choose the **Run** button.
2. The report will open on the Viewer tab.
3. If you make want to change the filters, click the Builder tab and make the changes.
4. Choose the **Run** button. The report will update with your new selections.

Saving a Report

Reports can be saved. The system saves the specifications for the report, not the output.

If you wish to save the filter selections you made for a standard template:

1. Click the Report Builder tab.
2. Choose the **Save As** button on the Builder toolbar.
   
   The Save Report dialog box opens.

3. Select the folder where you want to save the report.
   
   ✴ This dialog box is like All Reports. (See Also: [Working with Folders](#) for help with folders.)

4. Enter a report name and optional description.
5. Choose the **OK** button.
   
   ✴ To make the report public so that others in your company with access to the same data within this data source can see it, choose the **Public** checkbox next to the report. (If all the reports in a folder are private, the folder will not be visible to others.)

6. To run the saved report in the future, highlight it in All Reports and choose the **Run** button.
This page intentionally left blank.
Reports--Viewing

Viewing Reports

About the Viewer

When you run standard template, the report opens in the Viewer tab.

- Fields are displayed in rows or columns.
- Measures are grouped together in the row or column area.

Modifying the Report Grid

See Also: Changing the View in Reports, Changing the Measures in a Report and Sorting a Report for information on how you can modify the Report Grid.

"Locked" Reports

If the report uses non-additive measures such as % of Stores Ever Selling, includes multiple time periods, displays overall rank, or includes a non-mutually exclusive field such as an appended field, custom grouping, or a multi-punch field, you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column. Specify the layout before running. The lock symbol shows the report is “locked.”

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Other restrictions in “locked” mode:

- Check the Page Total checkbox in Layout to add a (Show All) option within Viewer. The default is set to (Show All). Only one page filter value can be selected at a time. The label in the page field identifies the selection, and the data will subset on this value.

- You cannot use share of row.

- If you subset, the grand total and share values will not change based on the subset.

- There are restrictions on exports; see also Exporting.

### Suppression Indicators and Low Transaction Indicators

#### Suppression Indicators for POS Data

Suppressed POS data is indicated by colors. Colors show the level of suppression to give you an indication of which data is most impacted in order to guide usage. The suppression flag is based on value, no matter what measures are selected. Suppression flags are based on the lowest level brand/item field in the report.

**NOTE** NPD does not break out sales of brands or items in limited distribution or sold mainly through a single retailer (e.g., private label or exclusives) in order to protect retailer confidentiality. Suppressed volume is accumulated in a separate line, typically at the bottom of the report, and shown as "All Other/Suppressed." This process is referred to as "suppression." Suppression is determined on a period-by-period basis, meaning a single item may be suppressed in certain months and not others.

Suppression is applied to the benchmark columns in all ALR/RCR reports (Account Level Release and Retailer Comparison Reports).

**Suppression colors:**

Less than 3% Suppressed (standard black)

3% to 15% Suppressed (light blue)

More than 15% Suppressed (gray italics)

In this example:

- Total Retail sales of Brand 1 in Feb 2013 is in gray italics to indicate more than 15% suppression.

- The gray $0 in the Total Retail column for Brand 2 in Feb 2013 indicates more than 15% suppression. Because the number is 0, you know it is fully suppressed.

- Total Retail for Brand 3 is blue for both months to show 3% - 15% suppression.

- Total Retail numbers in black are less than 15% suppressed.
Low Transaction Warnings for Consumer Data

For consumer data, low transaction warnings are indicated by colors: Low Limit (less than 35) is red and High Limit (35 to 200) is blue.

Changing the View in Reports

Dragging Fields to a Different Orientation

To drag a heading to a different orientation:

1. Click and hold the left mouse button on a row header and drag it to a column. (Or drag a column to a row.)
   
   Two small white arrows will appear in the new position.

2. "Drop" the header where you want the header to appear.

3. If you move the heading to the area labeled "Drop Fields Here," you can filter the entire report by the data. This is the Page area. (See Also: Filtering the View)

   NOTE: Restrictions on Changing the View:

If the report uses non-additive measures such as % of Stores Ever Selling, includes multiple time periods, displays overall rank, or includes a non-mutually exclusive field such as an appended field, custom grouping, or a multi-punch field, you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column. Specify the layout before running. The lock symbol shows the report is "locked."

Other restrictions in “locked” mode:

- Check the Page Total checkbox in Layout to add a (Show All) option within Viewer. The default is set to (Show All). Only one page filter value can be selected at a time. The label in the page field identifies the selection, and the data will subset on this value.

- You cannot use share of row.

- If you subset, the grand total and share values will not change based on the subset.

- There are restrictions on exports; see also Exporting.
Changing the Order of Rows or Columns

To rearrange the order of rows or columns:

- Position the mouse pointer over a row (or column) header, click and hold the left mouse button, and drag the column (or row) left or right. Two small white arrows show you where the row or column will be moved.

* You can also use the Fields list to rearrange groupings and change the order. (See Also: Using the Fields List)

Hiding a Row or Column or Freezing Rows

**NOTE** This is not available in a locked report. If a lock symbol is displayed, the report is locked, and you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time field when both measures and time are in the column.

<table>
<thead>
<tr>
<th>Action</th>
<th>To Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide a row or column</td>
<td>Right click in the &quot;token&quot; for a row or column and choose Hide from the context menu to hide the data. (The numbers will not change.)</td>
</tr>
<tr>
<td></td>
<td><img src="Hide.png" alt="Hide" /></td>
</tr>
<tr>
<td></td>
<td><img src="Show_Field_List.png" alt="Show Field List" /></td>
</tr>
<tr>
<td>&quot;Unhide&quot; a row or column</td>
<td>Right click in the &quot;token&quot; heading and choose Show Field List from the context menu.</td>
</tr>
<tr>
<td></td>
<td>The field you hid will be shown in the popup window.</td>
</tr>
<tr>
<td></td>
<td>Drag the field token to where you want it to display in the report.</td>
</tr>
<tr>
<td>Freeze rows</td>
<td>To freeze rows so you can keep the rows on the screen while you scroll columns:</td>
</tr>
<tr>
<td></td>
<td>- Choose the Freeze Rows check box on the Appearance toolbar.</td>
</tr>
<tr>
<td>Unfreeze rows</td>
<td>To &quot;unfreeze&quot; the rows, remove the check from the Freeze Rows checkbox under Appearance in the Viewer.</td>
</tr>
</tbody>
</table>

Changing the Number of Rows on the Screen

To specify the number of rows to show on each screen of the report layout:

1. Choose Appearance on the Viewer toolbar.
2. Choose Rows Per Page and specify the number of rows to display.
Moving Totals to Top or Bottom

To put totals at the top or bottom of the report view or to turn them off:
1. Choose Appearance on the Viewer toolbar.
2. Select Show Totals and select Top, Bottom, or None.

Changing the Measures in a Report

Changing the Order of the Measures

To change the order of the measures, move the mouse pointer to the area to the left above the row headers. Measure "tokens" will be displayed.

- Click and drag a measure "token" (such as Units or Currency) to a different position left or right.

To move the measures to the row or column area:

- Click and drag the Measures token to the row or column area.

You cannot move an individual measure to rows or columns. Use the Measures token to move all the measures. The Measures token does not appear when there are no other rows/columns in the report grid.

Showing Top N, Share, Percent/Point Change, or Report Info in Standard Templates

When you run a report, choose Settings on the Viewer toolbar and select:

<table>
<thead>
<tr>
<th>Option</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Report Info</td>
<td>Display a window with information on the report settings.</td>
</tr>
<tr>
<td>Top N</td>
<td>Filter the data to show just the top results: specify the number of results to show, the field to rank on, and the measure to rank on. You can show the top N results by item or by percent.</td>
</tr>
<tr>
<td></td>
<td>- Item shows specified number of items. (If there are 1200 items, Top N Item=10 shows top 10.)</td>
</tr>
<tr>
<td></td>
<td>- Percent shows specified percent of the total items. (If there are 1200 items, Top N Percent = 10 shows top 120.)</td>
</tr>
<tr>
<td></td>
<td>A &quot;Group Rank&quot; column or row will be added showing the top N.</td>
</tr>
<tr>
<td></td>
<td>Choose the Clear button in the Top N dialog box to remove the sorting.</td>
</tr>
</tbody>
</table>
## Sorting a Report

### Changing Sort Order from Ascending to Descending

To change the sort order of any row or column from ascending to descending, click the column/row header.

- The sort arrow in the header always shows whether the data is sorted in ascending or descending order.

![Ascending](Ascending)

### What Is Sort By Row or Column?

You can change the way data is sorted in the report by specifying the row on which you want to sort. (In order to sort by a row, you have to have at least one grouping in the columns in addition to the measures.) You can also sort the rows by one of the measures.

- For example, this report shows sales of categories by month. Months are arranged in chronological order with month Jan. 2010 at the left.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grand Total</td>
<td>$6,455,194,097</td>
<td>$7,567,300,857</td>
<td>$7,756,721,840</td>
<td>$5,641,304,763</td>
<td>$5,959,600,960</td>
<td>$7,684,899,204</td>
<td>$5,947,277,725</td>
<td>$6,824,584,736</td>
</tr>
<tr>
<td>Total PCs</td>
<td>$1,411,802,293</td>
<td>$1,731,723,928</td>
<td>$1,071,407,725</td>
<td>$1,237,804,509</td>
<td>$1,129,310,007</td>
<td>$1,201,312,807</td>
<td>$1,794,092,389</td>
<td>$1,802,677,779</td>
</tr>
<tr>
<td>Total Notebook Accessories</td>
<td>$73,767,136</td>
<td>$78,762,841</td>
<td>$87,964,281</td>
<td>$63,957,107</td>
<td>$65,439,157</td>
<td>$86,602,290</td>
<td>$60,860,075</td>
<td>$99,423,455</td>
</tr>
</tbody>
</table>

- When the report is sorted by the row "LCD," month Jan. 2010 moves to the eighth column, with descending dollar sales shown in that row. The double arrow shows the report is sorted by that row.
Sorting by Row or Column

To sort:

1. Right click in the row or column (not the header) to display the context menu.

   - **Sort "Category Group" by This Column**
   - **Sort "Category" by This Column**
   - **Sort "Sub Category" by This Column**
   - **Horizontal Alignment**
   - **Vertical Alignment**
   - **Show All**
   - **Hide Column**

2. Choose one of the sort options that are displayed.

To return to the original sort order:

1. Right click in the row to display the context menu.
2. Choose **Remove Sorting** from the menu.
Saving Viewer Format

There are three steps to saving your Viewer format changes:

Apply  
Update  
Save

Apply

Apply the format changes you want to make in Viewer (e.g., sorting, hiding columns, field rotation, and so on).

Before

After
Update

Click Update Selections within Viewer to add your Viewer format changes to Builder.

NOTE A collapsed field view will not be supported as part of your saved Viewer changes.

Save

Choose Save (or Save As) to save the report with the Viewer format changes.
Notes:

The below changes made within Builder will clear your Viewer format changes (e.g., sorting, hiding columns, Top N).

<table>
<thead>
<tr>
<th>Builder Modification</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time Period Filters</strong></td>
</tr>
<tr>
<td>Adding/removing/modifying a time period</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

**NOTE**  
Field rotation changes made in the Viewer (e.g., moving a field from row to page) will not be cleared when the above Builder changes are made.
Reports--Batching

Batching Reports

Batch is a DecisionKey Report Builder feature that allows users to schedule recurring reports to run automatically when data is updated. An additional feature of batch is the ability to report beyond Builder limits (identified within the Notification Center), bypassing the Viewer.

- You can only batch the reports that you have created. If you want to batch someone else’s public report, you can either copy the report from the Library into your own folder or do a save as from the Builder.
- A report must be saved before the Batch option becomes available.
- You can request up to 15 recurring reports to be delivered after a new data release (The Batch It With Every Data Release option).
- Scheduling your reports to run automatically after a new data release will remain in effect as long as you download the report once within 3 consecutive months, you don’t delete the report from File Center, or you don’t use the Remove From Queue button within the File Center or Library (All Reports or My Reports).
- You can use the Remove From Queue button within the File Center or Library to cancel a batched report with the status of Pending, Pending...On New Data Load, or Running.
- You can include up to 6 distinct Time Periods in a single report for Batch processing.
- You can include up to 8 Custom Groups in a single report for Batch processing.
- Reports run using the Batch It Now option will be added to the queue and completed one at a time.
- Batched reports will be overwritten if the same report title is run again or deleted after 90 days.

You see your own batched reports and public reports batched by others in your company who have access to the same data in this data source.

NPD will run batched reports for you on separate servers so as not to impact system performance for you and other users. When your report finishes running, the file will be available for you to retrieve in the File Center.

How Batch Works

You can batch a report once it is set up and saved. Report specifications are used to create Excel or CSV files.

- Reports up to 2 million records are available in Excel or CSV format.
- Reports of 2 – 5 million records are available in CSV format only.

**NOTE:** You can only batch in CSV format if your DecisionKey subscription includes this feature.
Running a Report/Batching a Report

- Messages in the Notification Center in Builder always tell you what steps need to be completed before your report is ready to run in the Viewer. Reports that meet the requirements to display in the Viewer will have an active Run button.

- For reports that do not meet the restrictions to display in the Viewer, only the Batch button will be active (after you have saved the report).

The Notification Center shown here tells you what changes to make in order to run the report in the Viewer, but you can choose instead to batch the report with the current specifications.

A report must be saved before the Batch option becomes available.

Creating a Batch Report

Batch provides the capability to run very large reports and have them delivered to you as downloadable files. You can have the report run now or with every data load.

- You can also batch a smaller report if you want it delivered only in file format rather than in the Viewer. (It may be faster to run a small report in the Viewer, however.)

To batch a report:

1. In Builder select your time periods, set filters, design the report layout, and select measures to include in the report. (See also: Choosing Filters, Layout, Measures) The basic requirements for a batch report are that you select:
   - At least one time period
   - At least one field for a row or column
   - At least one measure

   The other restrictions shown in the Notification Center do not apply to batch reports.

   ![Notification Center]

   ![Batch, Run, Save]

   ![Preview, Batch, Run, Save, Save]

   A report must be saved before the Batch option becomes available.

   ![NOTE]

   The limit for a batch report is 5 million records. When your batch report is run, if it returns more than 5 million records, you will receive an error message in the File Center. At that time, you can change the report specifications and batch the report again. (It is not possible to determine the exact amount of data that will be returned when the report is batched, only when it is actually run.)
2. Save your report criteria.

When the report is saved, the **Batch** button becomes active.

3. Choose the **Batch** button.

   ✴ You can request a Batch after a report is saved by clicking on the Batch button within **Builder** or in the **Library** under **All Reports** or **My Reports**.
OR: Library/All Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Created By</th>
<th>Modified By</th>
<th>Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring Batch Training</td>
<td>10/22/2019</td>
<td>10/22/2019</td>
<td>✔</td>
</tr>
<tr>
<td>Test_Training</td>
<td>10/22/2019</td>
<td>10/22/2019</td>
<td>✔</td>
</tr>
<tr>
<td>Item Scorecard_Training</td>
<td>10/21/2019</td>
<td>10/21/2019</td>
<td>✔</td>
</tr>
</tbody>
</table>

OR: Library/My Reports

<table>
<thead>
<tr>
<th>Folder Name</th>
<th>Report Name</th>
<th>Created By</th>
<th>Modified By</th>
<th>Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring Batch Training</td>
<td>Test_Training</td>
<td>10/22/2019</td>
<td>10/22/2019</td>
<td>✔</td>
</tr>
<tr>
<td>Recurring Batch Training</td>
<td>Item Scorecard_Training</td>
<td>10/21/2019</td>
<td>10/21/2019</td>
<td>✔</td>
</tr>
</tbody>
</table>

After clicking the Batch button, the Batch Reports dialog box will be displayed.

There are two ways to request a Batch report after you save a report:

- **Batch It Now** submits the report to run now and will deliver the results once complete.
- **Batch It With Every Data Release** is set as the default.
  
  This option schedules recurring reports to run automatically and delivers results after the release of the new month or week of data.
### Batch Report Choices

<table>
<thead>
<tr>
<th>Options</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Batch It Now</strong> runs the report now with current data and delivers results as soon as possible.</td>
<td>• You can use the Refresh button within the Batch Reports tab to refresh the status and see when the report is complete, or you can wait for notification via email that your report is available in File Center for download (see below).</td>
</tr>
<tr>
<td><strong>Batch It With Every Data Release</strong> (default) runs the recurring report and delivers results as soon as possible after the release of a new month or week of data. Your status will read as &quot;On New Data Load&quot; in the File Center.</td>
<td>• You can use the Remove from Queue button within the Library and/or File Center and the Delete button within File Center, under the Batch Reports tab to delete the file from the queue if you no longer want the report. Deleting a batched report won’t affect the report you saved. The original report will still reside in whichever folder you saved it in and can be batched at a later time.</td>
</tr>
</tbody>
</table>

| File Format                          |                                                                                           |                                                                                                                                                                                                 |
|--------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| **Excel** (default) creates the report in Excel format. If you choose this option, any field in Page will export on separate worksheets.                                                                                   | **CSV** (if available) creates the report in the .csv format, suitable for use with Excel if the report is under 2 million records or opened by many other applications as well.                                                                 |
| **Tableau Compatible**               |                                                                                                                                                                                                                                                                   |
| **NOTE**                             | The CSV and Tableau Compatible format batch options will only be available if your DecisionKey subscription includes this feature.                                                                                                                                  |                                                                                                                                                                                                 |

| Notifications                        | **Email Me When Ready** (default): Leave this checkbox selected if you wish to receive an email notification when the report is available in File Center for download. (The actual report won’t be included in the email.) |

<table>
<thead>
<tr>
<th>Appearance</th>
<th><strong>Formatted</strong> option (default) exports an Excel file as shown on the screen.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Unformatted</strong> option exports an unformatted version of an Excel file suitable for use in a pivot table report.</td>
</tr>
</tbody>
</table>
Viewing Batched Reports Status

Batched reports are listed in My Reports and All Reports and in the Batch Reports tab in the File Center. You see your own batched reports and public reports batched by others in your company who have access to the same data in this data source.

My Reports, All Reports, and the File Center all show:

- Who batched the report and when it was batched
- The status of the batched report

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>(Batch It Now only) The batch report is awaiting the queue and will be run as soon as possible.</td>
</tr>
<tr>
<td>Pending ... On New Data Load</td>
<td>The batch report will continue to run when a new month's or week's data is available.</td>
</tr>
<tr>
<td>Running...</td>
<td>(Batch It Now only) The batch is currently running.</td>
</tr>
<tr>
<td></td>
<td>✴ Choose the Refresh button in the title bar to refresh the status and see when the report is complete.</td>
</tr>
<tr>
<td>Ready-Warning</td>
<td>The batch is complete and ready for download; it was too large for an Excel format so it was delivered in CSV format (if your subscription includes this feature).</td>
</tr>
<tr>
<td></td>
<td>✴ If your subscription does not include the CSV feature, you will receive an error message indicating that you will need to update your selections within Builder to decrease the size of your report.</td>
</tr>
<tr>
<td>Error</td>
<td>The batch could not be run.</td>
</tr>
<tr>
<td></td>
<td>✴ Go to the File Center and hold the mouse pointer over the &quot;Error&quot; status to see a pop-up message explaining the error.</td>
</tr>
</tbody>
</table>

Refresh the display if necessary to see the latest information.

Things to Know about File Center:

- The File Center shows when the report will expire and be automatically deleted from the list.
- Files on File Center will be overwritten if the same report title is run again or deleted after 90 days.
- The File Center shows the file format-Excel, CSV, or Tableau Compatible.
- The File Center shows your own batched reports and public reports batched by others in your company who have access to the same data in this data source.
Managing and Modifying Batch Reports

Modifying Batch Reports

You can modify a report that you have batched.

To change the report specifications:

1. Select the report in My Reports or All Reports and choose the Edit button. The Builder opens.
2. Change report specifications and save the report.
3. Choose the Batch button to specify how to run the batch.

To change just the batch settings:

1. Select the report in My Reports or All Reports and choose the Batch button. The Batch Reports dialog box opens.
2. Make selections for the batch and choose the OK button. (See Also: Creating a Batch Report)

You can also click the folder name in File Center to open Available Reports. Select the report and choose the Edit or Batch button.
Removing Reports from the Queue

You can batch up to 15 recurring reports for every data load. If you try to batch more reports, you will get an error message telling you to wait until reports run or to remove one or more reports from the queue.

To remove a pending report from the queue:

1. Select the report in My Reports or All Reports from the Library or within File Center, under the Batch Reports tab.
2. Choose the **Remove from Queue** button.

   You can also choose the **Delete** button within File Center, under the Batch Reports tab, to delete the file from the queue if you no longer want the report (as outlined in Deleting Reports below).

   **NOTE** You can only remove your own batched reports from the queue. And you can only remove reports with a Pending, Pending...On New Data Load, or Running status.

Deleting Reports

To delete the batch results file from the File Center:

1. Select the report in the File Center.
2. Choose the **Delete** button.

   This deletes the file (either completed or still in queue).

You can also delete a report from All Reports.

   ✴ Deleting the report in All Reports deletes the **entire** report specification.

To delete a report in All Reports:

1. Select the report in All Reports.
2. Choose the **Delete** button.

   (See Also: [Opening, Copying, Moving, Renaming, Deleting Reports](#))
Downloading Batch Reports

Completed batch reports are available for download in the File Center. You can download any report that you see in the File Center. (See Also: Viewing Batched Reports Status)

Downloading a Batch Report

To download a report:

1. Choose File Center in the left navigation panel to open the File Center.
2. Choose the Batch Reports tab.
3. Select the report and choose the Download button or click the underlined report hyperlink.
   
   You will have the option to open or save the file. The steps you take depend on the browser you are using. For example, you may see a dialog box with an option to open or save the file or you may be able to open or save the file from "Downloads."

   Or

   Click to the right or left of the hyperlink to highlight the report. Then choose:
   - Download: Open the Excel, CSV, and/or Tableau Compatible (if available) dialog box.
   - Delete: Delete the batched report (see "Deleting a Batch Report File" below).

   ✶ If the status is "Error," hold the mouse pointer over the message to read the full text.

Deleting a Batch Report File

The batch file will be deleted after 90 days. If you batch the report again it will be overwritten, either when the file runs in Batch It Now mode or on the next data load if you batch it with every data release.

To delete the file manually:

1. Select the file.
2. Choose the Delete button.
This deletes the results of the batch, but not the report specifications. You will still see the original report in All Reports and My Reports (in whichever folder you saved it in) and can batch it again at a later time.

**NOTE** Only the report owner can delete a batch file.

### Running Batch Reports Again

If you want to run a batch report again with different settings (for example, in Excel formatted instead of unformatted), you need to batch it again.

The batch file will be deleted after 90 days. If you batch the report again it will be overwritten, either when the file runs in Batch It Now mode or on the next data load if you batch it with every data release.

To set up a batch again:

1. Select the report in My Reports or All Reports and choose the **Batch** button.
   
   The Batch dialog box opens.

2. Make selections for the batch and choose the **OK** button. (See Also: *Creating a Batch Report*)

   You can also click the Folder Name in File Center to open Available Reports. You can select the report and choose the **Batch** button.

To change the specifications for the report itself before you batch it, choose the **Edit** button. (See Also: *Managing & Modifying Batch Reports*)

### How to Cancel a report from Batching

You can cancel a report from Batching when the status is Pending, Pending…On New Data Load, or Running.

If you select Batch It Now, your report status will read as Pending, Running, and then Ready. If you select Batch It With Every Data Release, your report status will read as Pending…On New Data Load. You can use the Remove from Queue button (before the report status says Ready) within the Library (All Reports or My Reports) or within the File Center (under the Batch Reports tab) to delete the report from the queue if you no longer want the report.

A pop-up message will appear asking you to confirm that you want to remove the report from the batch queue.
Deleting a batched report won’t affect the report you saved. The original report will still reside in the folder in which you saved it in within the Library and can be batched later.
This page intentionally left blank.
Saving Reports

When you have selected report criteria, you can save these specifications so you can run the report again.

Saving a Report

To save the report:

1. On the Builder tab, chose the Save button in the lower toolbar. The Save Report dialog box opens.

2. Select the folder where you want to save the report.

   **NOTE** If you have already saved the report, save changes with the Save button. Use the Save As button to save the report with a different name. Also use Save As to save a copy of someone else's report or to save a standard template.

3. Select the folder where you want to save the report.

   * This dialog box is like All Reports. (See Also: **Working with Folders** for help with folders.)

4. Enter a report name and optional description.

5. Choose the OK button.
**Public vs. Private Reports**

To make the report public so that others in your company with access to the same data within this data source can see it.

- Choose the **Public** checkbox next to the report in Save Report or All Reports.

**Working with All Reports**

**Using All Reports**

Reports can be opened or run from All Reports on the Library tab. (See Also: **Batching Reports**)

- Organize the reports in folders, which are shown in the left section of All Reports. When you select a folder, its contents are displayed in the right section. (See Also: **Working with Folders**)
- Work with the reports in the right section: You can edit, run, copy, move, rename, or delete a report. (See Also: **Opening, Copying, Moving, Renaming, Deleting Reports**)

**Public vs. Private Reports**

The person who first saved the report is the report owner.

- To save someone else’s report so you can modify it and use it, use the **Save As** option and choose one of your folders as the location.
- Public reports are visible by everyone in your company with access to the same data within this data source.
- Private reports are visible only to the owner.
- Folders containing only private reports are visible only to the owner.

Choose the **Public** check box in the Save Report dialog box when you save a report to make it public. You can also select the **Public** check box in All Reports or My Reports to change this setting.
Working with Folders

Work with report folders in All Reports.

![Folder Tree](image)

**NOTE** Click on the menu button to display a button if it is not shown.

Viewing Folders

To view folders:

- Click the Expand All button on the All Reports toolbar. (You may need to click the double arrow first.)

  All the folders in the tree will be displayed.

  Or

- Drill down through the tree by clicking the plus signs.

As you open a folder, its contents are shown in the area at the right.

Creating a New Folder

To create a new folder in which to store reports:

1. Highlight the folder under which you want to place a new folder.
2. Choose the New Folder button on the toolbar.
   
   A new folder will be added to the tree with its label "New Folder" highlighted so it can be edited.
3. Enter the new name for the folder and press the Enter key.

Renaming a Folder

To rename a folder:

1. Click a folder name twice. (Pause between clicks.)
   
   The label will be highlighted.

2. Enter the new name for the folder and press the key.
Deleting a Folder

To delete a folder:
1. Highlight the folder.
2. Choose the Delete button on the toolbar.
   The folder will be deleted.

Opening, Copying, Moving, Renaming, Deleting Reports

Opening and Editing a Report

To open a report so you can make changes to it:
1. In All Reports, drill down through the tree to the folder you want and view the reports in that folder.
2. Highlight the report and choose the Edit button on the toolbar.
   Or
   Double click the report name.
   The report opens on the Builder tab. Make changes if desired and run the report there.

Running a Report

To run a report directly from the Library tab:
1. In All Reports, drill down through the tree to the folder you want.
2. Highlight the report and choose the Run button on the toolbar.
   The report opens on the Viewer tab.

Copying a Report

To copy a report:
1. In All Reports, drill down through the tree to the folder you want.
2. Highlight the report at the right.
3. Choose the Copy button on the toolbar.
   Click the menu button to display a button if it is not shown.
   The Paste button appears in the Saved Report section.
4. Highlight a folder and choose the Paste button to put a copy of the report in the folder.
Renaming a Report

To rename a report:
1. In All Reports, drill down through the tree to the folder you want.
2. Highlight the report at the right.
3. Choose the Rename button on the toolbar.
4. Enter a new name for the report in the text box.
5. Choose the Rename button.

Moving a Report

To move a report to a new folder:
1. In All Reports, drill down through the tree to the folder you want.
2. Highlight the report at the right.
3. Drag the report to the new folder.
   Or
   a. Choose the Cut button on the toolbar.
      The Paste button appears in the Saved Report section.
   b. Highlight a folder and choose the Paste button to put the report in the folder.

Deleting a Report

To delete a report:
1. In All Reports, drill down through the tree to the folder you want.
2. Highlight the report at the right.
3. Choose the Delete button on the toolbar at the right.
   The report will be deleted.

Working with My Reports

My Reports is a list of reports you have created.

- To change the report, highlight it and choose the Edit button. Make changes on the Builder tab and run the report.
- To run the report with the current specifications, choose the Run button.
- To make the report public for everyone in your company with access to the same data in this data source, check the Public check box.
• To run the report as a file to be delivered in File Center. Choose the Batch button.
• To remove the report from the batch queue, choose the Remove from Queue button.
(See Also: My Reports in Tabs, Toolbars, Components)

Working with Recent Reports

Recent Reports is a list of reports you have recently run, both those you created and other users’ reports that you have opened and run.

• To open one of the reports, click the report name.
  The report will open on the Builder tab where you can run the report or make changes to the specifications before you run it, print it, or save it.
  Or
• Highlight the report and choose the Run button to run the report.
(See Also: Recent Reports in Tabs, Toolbars, Components.)
Printing Reports

Printing

Use the options on the toolbar to print reports.

(See Also: Toolbars. For custom text options see also: Setting Preferences and Selecting Display Options)
Exporting Reports

Exporting

Use the Export option on the Viewer toolbar to export reports. Choosing the Export option opens the menu.

Export to Excel

To export a report to Excel:
1. Choose Export in the Viewer.
   The menu opens.
2. Choose Excel to export the current view, formatted, for all versions of Excel.
   Or
   Choose Excel (Advanced) for more options. The Excel (Advanced) dialog box will open.

* To do a quick export of what you see on the screen, choose the Excel option.
### Advanced Options

<table>
<thead>
<tr>
<th>Excel Version</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Excel 2007 and Above Format</strong> opens the file in the Excel 2007 and above format.</td>
</tr>
<tr>
<td><strong>Excel 2003 Format</strong> opens the file in the Excel 2003 format.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appearance</th>
</tr>
</thead>
<tbody>
<tr>
<td>The <strong>Formatted</strong> option exports an Excel file as shown on the screen.</td>
</tr>
<tr>
<td>The <strong>Unformatted</strong> option exports an unformatted version of an Excel file suitable for use in a pivot table report.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Views to Export</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current View</strong> is the view as shown on the screen.</td>
</tr>
<tr>
<td><strong>Measure Views</strong> exports a view with all measures and then each measure in a separate view.</td>
</tr>
<tr>
<td><strong>Page Views</strong> exports all page fields in one view and then a view of each page field separately. (This option only applies if you have something in the page filter area. Only selected page fields are exported.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Export Format</th>
<th>When <strong>Measure Views</strong> or <strong>Page Views</strong> is selected, these choices become available:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Separate Worksheets</strong>--Each measure or page field is on a separate Excel tab.</td>
<td></td>
</tr>
<tr>
<td><strong>Append Horizontally / Append Vertically</strong>--Measure views or page views are on one worksheet, arranged either vertically or horizontally.</td>
<td></td>
</tr>
</tbody>
</table>

3. Save or open the Excel file.

**NOTE** If the report is locked (lock symbol in the header) and you export multiple views, there are limits on what is exported. If the report that has, for example, categories and brands in the page filters, you will not see the data on “all categories” for each brand. You will see totals for Category X/Brand A and Category Y/Brand A. You will not see All Categories/Brand A as you would in a report that is not locked. If the report is locked, you can check the Page Total checkbox in Layout, which will add a Show All to the page selections within Viewer. If multiple page fields are included in the same report, only a single Total tab will be produced upon export. There will not be a Total tab per combination as there is with unlocked reports today.

### Export PDF Documents

To export a report in PDF format:

1. Choose Export on the toolbar and choose the PDF option.
2. View, save, or print the file.
Export CSV Files

**NOTE** You can export in CSV format if your subscription includes this feature.

To export a report as a CSV (comma-separated value) file:
1. Choose Export on the toolbar and choose the CSV option from the menu.
2. Open or save the file.

   ✳ Change the export delimiter in Preferences. (See Also: Setting Preferences)
Tips & FAQs

FAQs

Check these frequently asked questions to see whether they address your question.

Questions on Batch

*The Batch button is not active when I am creating my report in Builder. How can I batch a report?*

Select at least one time period, one layout field, and one measure. Save the report. Then you can choose the Batch button.

*I got an email that there was an error with my batch report. What is the problem with it?*

Go to the File Center and hover the mouse pointer over the hyperlinked "Error" status to read the error message.

*How long will the batch report remain in the File Center?*

The batch file will be deleted after 90 days. If you batch the report again it will be overwritten, either when the file runs in Batch It Now mode or on the next data load if you batch it with every data release.

Questions on Clusters, Custom Groupings, Reclassified Fields, and User-Defined Fields

*How do I show All Others in a cluster?*

Choose the Others check box in Cluster Setup. Then filter on the cluster set and include clusters in your layout. (See Also: Creating Clusters)

*How do I put a cluster in a report?*

First, select Cluster Set as the View option in the Filter Workspace. Select a cluster set filter. Then add the cluster set and/or clusters to the layout. (The cluster will have a generic name such as Category Cluster.)

*Does DecisionKey have reclassified fields?*

DecisionKey has clusters, which are like PowerView's reclassified fields. See Also: Working with Clusters and Cluster Sets.

*Does DecisionKey have user-defined fields?*

DecisionKey has custom groupings, which are like PowerView's user-defined fields. See Also: Working with Custom Groupings
Questions on Reports

What is that lock in the toolbar?

If a lock symbol is displayed, the report is locked, and you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time field when both measures and time are in the column.

My cube seems frozen. Why can't I move rows and columns around on the cube?

If the report uses non-additive measures such as % of Stores Ever Selling, includes multiple time periods, displays overall rank, or includes a non-mutually exclusive field such as an appended field, custom grouping, or a multi-punch field, you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column. Specify the layout before running. The lock symbol shows the report is “locked.”

Other restrictions in “locked” mode:

- Check the Page Total checkbox in Layout to add a (Show All) option within Viewer. The default is set to (Show All). Only one page filter value can be selected at a time. The label in the page field identifies the selection, and the data will subset on this value.
- You cannot use share of row.
- If you subset, the grand total and share values will not change based on the subset.
- There are restrictions on exports; see also Exporting.

A row heading is highlighted, but I can't drag it to the column area.

If there are no other column headings, you cannot drag a heading to the columns. Click the Builder tab to change the layout.

Questions on Data

How do I change the data source?

Click the data source name in the Title Bar to display the Data Source List. Double click the new data source to open it.

Do I have to select the data source each time I log in?

Choose Setup on the toolbar and then Preferences to set the option for the default data source that will display when you log in.

I changed my default data source, but I do not see it when I log in.

You may need to log off, close your browser, and open the browser and application again for your preferences to take effect.

Questions on Layout

I specified subtotal in my report layout, but it does not appear in the Viewer.
If you include a subtotal and the report includes any measure where totals and subtotals are not applicable because the measure is a non-additive measure, that subtotal will be blank in the report.

**Questions on Measures**

*How were the measure definitions arrived at?*

The measure list was taken from the official NPD measure definitions.

**Questions on Preferences**

*How do I set Preferences?*

Preferences are under **Setup** in the left navigation panel.

**Questions on Saving, Exporting, and Printing**

*Can I export a report to an Excel pivot table?*

Use the CSV export (if your subscription includes this feature) or choose the Excel (Advanced) export from the Viewer and choose the Unformatted option.

**Questions on Screens and Tabs**

*Which reports show up in Recent Reports?*

Recent Reports shows the reports that you have run recently, including both reports you created and other users' reports that you have run.

*How do I return to the main tab—the Library tab?*

Click the **Library** tab.

*Why are some tools grayed out and not available?*

Tools that are used for functions that you do not have access to are grayed out. These functions are ones that do not apply to your subscription and permissions.
Questions on Time

The 6 Month option in Filters gives me a six-month total, but I want to show six months of data as separate months. How do I do this?

Select the 1 Month time period in Filter and enter your End Month. Then select Compare to Trend and specify 5 comparison periods. You will see 6 months of separate monthly data.

I want to see 4 months of data as a total not as a trend of individual months. How do I do this?

Select the Custom Months Combined option for Time Scale. A number field will appear and you can select the number of months to include, from 1 to 12 months. Add the time period to your report to see a total for the number of months you picked.
Tips
Below are tips to make your work more efficient and effective.

Report Creating and Viewing

Use Someone Else’s Report as a Model
To save someone else's report so you can modify it and use it, use the Save As option after you open a report in Pro. Choose one of your folders as the location.

Preview your Report
Before running your report and retrieving data, choose the Preview button to see the report layout and make sure you have the components you need. The preview will only display the structure and not contain any data.

Logging In and Off

Display your Most-Used Data Source
If you have access to multiple data sources, use Preferences to select the data source to open each time you log on.

Automatic Logoff
After 50 minutes of inactivity, a pop-up box will provide a 5-minute countdown. Click Continue or you will be automatically logged off. It is wise, therefore, to save your work frequently as you work so you will not lose work if you step away from your computer.
Saving Time

Subset Data

Because the data sources are very large, it is important to use filters to subset the data you are bringing into the report. At the minimum, select a time period filter.

Use Auto Update

If you want your report to automatically update when a new month (or week) of data is available without your having to change the report specifications, choose the option for the End Date in the Workspace when selecting time filters.

* If you select Custom Year-to-Date or Custom Period-to-Date, Auto Update will be selected by default.

Find Options Quickly

When creating your report layout, use the button to navigate through pages of results. Either move the slider to see other pages or change the number of rows that display. Also use the Search functionality to locate matches.
Glossary

A

Add button: Use the Add button to move values from available to selected.

All Reports: Shows you all reports available to you. Includes both your private and public reports as well as the public reports of others in your company.

Appearance: Toolbar option available within the Viewer that includes Rows Per Page, Show Totals, Freeze Row and Show Paging Footer.

Append Rows/Columns: To see fields in a stacked view, rather than a nested view, select append rows/columns under the Selected area within Layout.

Auto Update: When you accept Auto Update for the End Date, your report will update automatically when new data is available.

B

Batch: Allows users to schedule recurring reports to be run automatically when data is updated. An additional feature of batch is the ability to report beyond Builder limits (identified within the Notification Center), bypassing the Viewer. (See Also: DecisionKey Batch Reference Guide).

Batch Reports: A tab located under File Center where users can download, cancel or delete batched reports. (See Also: DecisionKey Batch Reference Guide).

Builder: Where you create an ad hoc report or modify an existing report.

C

Calculate Percent/Point Change: Use the drop-down next to Calculate Percent/Point Change to select the type of comparison to show percent/point change for the time period.

Cluster Set: A new field created by combining values into clusters from one field in the data source. A private cluster set can be seen only by the person who created it. Public cluster sets are visible to users within the same company who share the same access. (See Also: DecisionKey Cluster Sets Reference Guide).

Clusters: Grouping of values within a particular field. Used to create cluster sets. (See Also: DecisionKey Cluster Sets Reference Guide).

Collapse ‘Others’: Set a preference to see Top N, Clusters, Custom Groups, and Share of Total fields with ‘Others’ rows collapsed by default.

Comparison: You can compare to year-ago (this year vs. last year), trend (consecutive time periods) or rolling trend (allows you to see sales in overlapping cycles) based on the time scale selected. You can also select the number of comparison periods.

CSV: Option under Export that allows you to view your report in a CSV (comma-separated-value) format.

Custom Grouping: Allows you to combine values from a number of fields into one field. (See Also: DecisionKey Custom Groups Reference Guide).
Glossary

D

**Data Available:** Shows the date range for the available data.

**Data Headers:** If more than two measures are displayed, you will need to hover over Data Headers to see your measures.

**Data Source:** The database against which reporting is done. Selected after login and/or from the Current Data Source drop-down list.

**Display As:** Allows you to define within the time period filter how you want the data displayed.

**Display Settings:** Section under Report Options that allows you to define custom header and footer settings for a printed and/or exported report.

E

**Edit:** Opens a report in Builder.

**End Date:** Select an End Date other than Auto Update to quickly change a report from Auto Update to a report with a specified end date.

**Excel:** Option under Export that provides a view of what appears on the screen (formatted).

**Excel Advanced:** Option under Export that provides choices so you can specify the version of Excel, determine if you want to see a formatted or unformatted view, identify the data you want to export and how you want it to be displayed within Excel.

**Export:** Toolbar option available within the Viewer that includes Excel, Excel Advanced, PDF and CSV (if available).

F

**Fields:** Option under Settings that allows you to swap multiple fields in the Viewer at the same time.

**File Center:** Retrieve your reports processed via Batch and access the File Repository for basic information about your business and data source, such as data delivery calendars and field definitions.

**File Repository:** A tab located under File Center where you can access basic information about your business and data source, such as data delivery calendars and field definitions.

**Filter:** Section under Report Options where you select criteria to subset data.

**Folder:** Location where saved reports are stored on the server.

**Freeze Row:** Option under Appearance that allows you to freeze rows so you can keep the rows on the screen while you scroll left and right.

G

**Grand Total:** Choose this option under the Selected area within Layout to display a Grand Total in Viewer.

**Group Rank:** Shows the rank position of each value within its group. (See Also: DecisionKey Ranking Reference Guide).
Help & Training: Includes a wide range of available resources to help you learn and utilize the features within DecisionKey. (See Also: DecisionKey Help & Training Resource Guide).

Layout: Section under Report Options where you specify the fields to appear in the rows, columns, and page for a report.

Library tab: The home tab of the application where you access saved reports and standard templates.

Locked view: Report view where you will not be able to drag and drop fields, with the exception of measures. You do have the ability to drag and drop the measures field after the time period field when both measures and time are in the column. Rotating isn’t available when including such items/features as non-additive measures, multiple time periods, non-mutually exclusive fields, custom groups, overall rank, or retailer share measures.

Log Off: Log off of DecisionKey.

Measures: Section under Report Options where you choose specific measures to include in your report. (See Also: DecisionKey Measures Reference Guide).

Move Down button: Use this Move Down button to rearrange the order of the fields.

Move Up button: Use this Move Up button to rearrange the order of the fields.

My Reports: Shows only the reports you have created. Includes both private and public reports.

Notification Center: Provides a series of prompts to help you build a report. When all criteria are met, the Preview and Run buttons will be enabled.

npd logo: Access NPD’s website.

Orientation: Select Row, Column, or Page to specify the location of the fields within the Viewer.

Overall Rank: Shows the unique rank for every item in your report. (See Also: DecisionKey Ranking Reference Guide).

Page By: Option that allows you to place a dimension in a filter area and filter the report results by that dimension. Adds the third dimension to a report grid.

Page Total: When the Page Total option is checked, it will add a (Show All) option at the top of the page field drop-down for locked reports.
Password: Combination of letters and/or numbers and/or symbols used to verify access at login. The original password is system-assigned and changed by the user at first login and periodically after that.

PDF: Option under Export that allows you to view your report in a PDF format.

Percent/Point Change: Option under Settings that allows you to indicate whether to show change as a percent/point or as an absolute number.

Preferences: Allows you to change certain default Data Source, Builder, Viewer and Format settings.

Preview: Allows you to see the structure of your report without the data.

Price Segmentation: Price Segmentation is a powerful feature that lets you flexibly and efficiently create your own customized price bands for price segmentation analysis.

Print: Toolbar option available within the Viewer that allows you to preview your report in Adobe Reader.

Pro: Where you build a new ad hoc report using the Builder.

Public Report: Allows you to share reports with other users within the same company who share the same access.

Recent Reports: Shows your last 10 accessed reports. Includes both private and public reports.

Remove button: Use the Remove button to move values from selected to available.

Remove from Queue: Remove a pending report that is scheduled to run or currently running from Batch. (See Also: DecisionKey Batch Reference Guide).

Report Options: Component of Builder where you specify filters, layout, and measures for a report.

Report Results: Option within the Measures folder that allows you to set lower and upper ranges for the measures to be included in the report.

Report Selections: Component of Builder where you see the specifications for your report.

Reproduce button: Copy reports from one data source to another, where applicable, by using the Reproduce button.

Rolling Trend: Allows you to see sales in overlapping cycles.

Rows Per Page: Option under Appearance that allows you to specify the number of rows to show on each screen of the report layout. By default, Rows Per Page is set to 30 so as not to impact the response time of the Viewer.

Run: Opens your report in Viewer.

Save: Allows you to save your Report Selections in a folder you specify.

Saved Report: Report that has been created and saved so that it can be run again or modified and rerun.

Search Box: Use the Search Box available within Filter, Layout and Measures to help narrow down your choices.

Security Key: Some NPD accounts require the entry of a Security Key at login. A security key is entered after your username and password to verify your identity. Security keys are assigned to you by the system and are sent to you via email.
**Settings:** Toolbar option available within the Viewer that includes Show Report Info, Top N, Fields, Share of Row and Percent/Point Change.

**Setup:** Allows you to create Clusters and Custom Groupings and access Preferences.

**Share of Row:** Option under Settings that allows you to include horizontal share.

**Show Paging Footer:** Option under Appearance that includes page number footers. You can deselect the checkbox to turn off the feature.

**Show Report Info:** Option under Settings that displays the criteria used to build a report.

**Show Totals:** Option under Appearance that allows you to specify where your totals are displayed or turn them off.

**Sort:** Arrange data elements in order by ascending or descending order.

**Standard Template:** Predefined reports that show common views of the data. Listed in Standard Templates on the Library tab.

**Start Month:** Allows you to define a Start Month when creating a Custom Year-to-Date or Custom Period-to-Date.

**Start Week:** Allows you to define a Start Week when creating a Custom Year-to-Date or Custom Period-to-Date.

**Subtotal:** Option available within the selected area in Layout that allows you to include a subtotal on field(s).

**Suppression Flags:** Colors show the level of Suppression to give you an indication of which data is most impacted in order to guide usage. Suppression flags are based on the lowest level brand/item field in the report.

**Time Period:** Options in the Filter and Layout sections within Builder.

**Time Scale:** Options that allow you to filter data by time segments: YTD, 3 months, 6 months, current month, as well as custom time segments.

**Title Bar:** Area at the top of the screen that identifies the data source currently open, and for what period data is available.

**Toolbar:** Set of buttons that execute commands. Toolbars are different depending on where you are in the application.

**Top N:** Option under Settings that allows you to configure Top N to display top items for a selected field and measure. (See Also: DecisionKey Saving Top N Reference Guide).

**Update Selections:** Click Update Selections to add your Viewer format changes, including Top N to Builder. (See Also: DecisionKey Saving Viewer Format Reference Guide; DecisionKey Saving Top N Reference Guide).

**Username:** Identifier used to log in to DecisionKey. It is set by the system and cannot be changed.
**Glossary**

**V**

**View:** A button located in the Available section when selecting a field within Filter, used to view cluster sets. (See Also: DecisionKey Cluster Sets Reference Guide).

**Viewer:** Report viewer where you see the results when you run a report. Allows you to “turn” or “pivot” the data to see it from different perspectives. The ability to "page by" adds a third dimension to the rows and columns.

**W**

**Workspace:** Center panel of the Builder tab where you select specific filters, layout options, or measures.