insightsoftware

Analysis and Reporting Guide

Longview

Version 26

Document Information

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Contents

Getting Started In Longview Analysis and Reporting

You can get started quickly and easily in Longview Analysis and Reporting. You can also choose to work offline to save Internet connection costs, or when no connection is available for your computer.

Launching Longview Analysis and Reporting

This section explains how to start Longview Analysis and Reporting, including authentication and security considerations.

Understanding your Longview database

Your company uses a large database containing its financial data. A Longview database consists of dimensions, hierarchies, and symbols. You can work with the application more effectively if you understand the basic concepts first.

Dimensions

The Longview database contains a wealth of information, divided into different categories. For example, some of the information describes the accounts in the General Ledger, some the world-wide locations in which your company does business, and so on. Each individual bit of information is stored in a symbol. Symbols are organized in hierarchies.

In the Longview database, each broad category of data is called a dimension. A dimension is a set of similar elements providing a structure for information analysis. You can manipulate the display of dimensions to see exactly the combination of data you need.

ACCOUNTS dimension

The ACCOUNTS dimension contains symbols that represent the accounts in a Trial Balance. The ACCOUNTS dimension is the first dimension in the Longview database for our hypothetical company.

Dimension	Description	Example
ACCOUNTS	Contains symbols representing Trial Balance accounts. Usually listed down the left side of the document.	▪ Cash ▪ Net Income

TIMEPER dimension (TIME)

The TIMEPER dimension contains the concept of time references such as months, quarters, and years. The TIMEPER dimension is the second dimension in the Longview database for our hypothetical company

Dimension	Description	Example
TIMEPER	Contains symbols representing time periods. Usually listed across the top of the document.	▪ current month ▪ current year

Note: Depending on how your Longview system has been set up, your TIMEPER dimension may appear with another name — for example, TIMEPERIODS. Examples and illustrations in this guide may appear with either variation.

ENTITIES dimension

The ENTITIES dimension is the third dimension in the Longview database for our hypothetical company.

To understand the concept of the third dimension, imagine that you are stacking worksheets with accounts down, time periods across, and entities deep. This stack of worksheets can be compared to a cube of data, where each dimension of the cube (down, across, and deep) represents the first three dimensions in the database.

Dimension	Description	Example
ENTITIES	Contains symbols representing business locations. Represents the depth of the three-dimensional cube behind the ordinary flat workbook.	▪ Dallas ▪ Toronto

CURRENCY dimension

The CURRENCY dimension contains symbols used in the data translation process (also known as foreign exchange). The CURRENCY dimension is the fourth dimension in the Longview database for our hypothetical company.

Note: Depending on how your Longview system has been set up, your CURRENCY dimension may appear with another name — for example, CURRENCIES. Examples and illustrations in this guide may appear with either variation.

Dimension	Description	Example
CURRENCY	Contains symbols representing the various currencies used by your company.	▪ Total U.S. dollars ▪ Total Euros

Almost all Longview databases contain a CURRENCY dimension. However, if your company deals solely with one currency, you may not have a CURRENCY dimension in your Longview database.

PRODUCTS dimension

The PRODUCTS dimension contains symbols that represent products manufactured by our hypothetical company. The PRODUCTS dimension is the fifth dimension in the Longview database for our hypothetical company.

Dimension	Description	Example
PRODUCTS	Contains symbols representing the individual products sold by your company.	▪ Modems ▪ Printers

CONTROLS dimension (VERSIONS)

The CONTROLS dimension contains symbols needed for various special tasks in the application. The CONTROLS dimension is the sixth dimension in the Longview database for our hypothetical company.

The CONTROLS dimension is usually the last dimension in a Longview system.

Dimension	Description	Example
CONTROLS	Also contains symbols required by your Longview system for allocations and scenarios, to view subsets of hypothetical data for planning and budgeting purposes.	▪ PFCut1 ▪ PFCut2

Note: Depending on how your Longview system has been set up, your CONTROLS dimension may appear with another name — for example, VERSIONS. Examples and illustrations in this guide may appear with either variation.

Fixed symbols in each dimension --specific to AR, move to working with data content

Each dimension needs a reference to an individual default symbol in the dimension. The fixed symbol is a single symbol selected in one of the fixed dimensions.

The default fixed symbol is known as the Dim#Set, where the pound sign (#) represents the number of the dimension (beginning with zero, not one).

Note: Depending on how your Longview system has been set up, your default fixed symbol may be name <dimension>_Default. Examples and illustrations in this guide may appear with either variation.

So, for example, the dimensions for our hypothetical company contain the following fixed symbols:

Dimension	Order in database	Fixed symbol
ACCOUNTS	First	Dim0Set / ACCOUNTS_Default
TIMEPER	Second	Dim1Set / TIMEPER_Default
ENTITIES	Third	Dim2Set / ENTITIES_Default
PRODUCTS	Fourth	Dim3Set / PRODUCTS_Default
CURRENCY	Fifth	Dim4Set / CURRENCY_Default
CONTROLS	Sixth	Dim5Set / CONTROLS_Default

Hierarchies

Each of the symbols in the Longview database relates in some way to other symbols. For example, the ***symbol*** Sales in the ACCOUNTS dimension intersects every symbol in all the other dimensions of the Longview database.

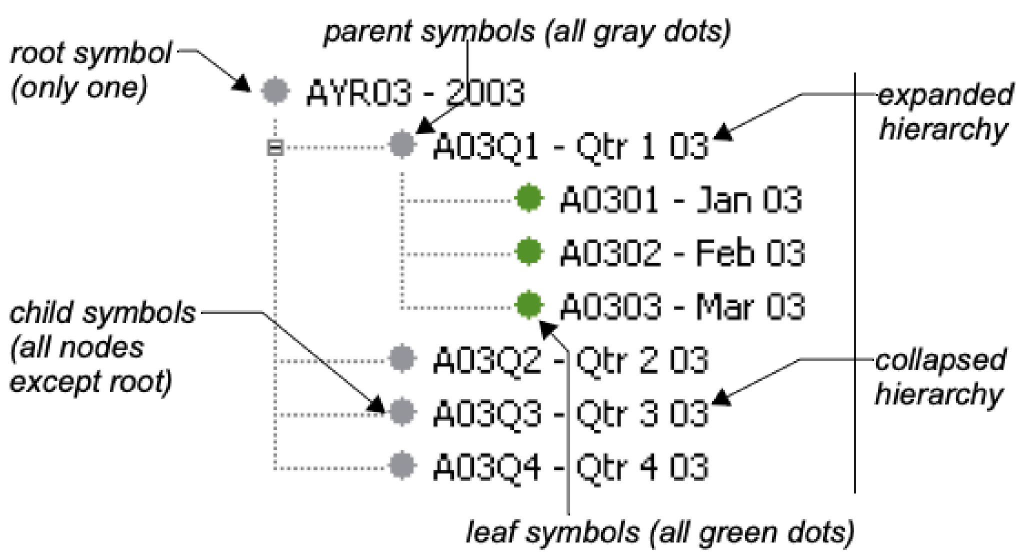
The relationship between individual symbols is called a ***parent/child relationship***. The relationships as a whole are known as a ***hierarchy***.

A hierarchy is a method of organizing symbols and their relationships to each other in their ***dimension***. In a Longview database, a symbol can occur only once, and can reside in only one dimension.

In any hierarchy, there are four types of symbols.

Symbol Type	Description
Leaf	Has no child symbols beneath it in its hierarchy. The value of a leaf symbol can be entered manually or by import, but it cannot be specified by a rollup like the value of a parent symbol.
Child	Has at least one level of symbols above it in its hierarchy. The total value of each child symbol specifies the value of the parent. A child symbol is often referred to as a leaf symbol, but it is important to remember that a parent symbol can also be a child symbol.
Parent	Has at least one child symbol beneath it in its hierarchy. The values of the child symbols specify the value of the parent symbol. However, some parent symbols are static, and therefore their value is not specified by their child symbols.
Root	Has no symbols above it in its hierarchy. Its value does not roll up to any other symbols. There is only one root symbol in any hierarchy. However, there may be more than one hierarchy in a dimension, and thus more than one root symbol in a dimension.

In this component, a hierarchy looks like this



Symbol information

Every symbol in the Longview database is identified by characteristics, such as names and descriptions.

Information type	Description
Name	Condensed form of the symbol’s description. A symbol name can be from two to 31 characters in length. These short forms are specified when a Longview application is originally written. When referring to a specific symbol, the application identifies it by its symbol name.
Description	Text describing the purpose of a symbol in more detail than the symbol name. A symbol description can consist of a maximum of 100 characters. The Longview database can contain descriptions in additional languages for the same symbol. A symbol description in a language other than the primary language of your company is an alternate symbol description.

Depending on how your Longview system is configured, you might see the name, the description, or both.

The way a symbol appears and operates in the application depends on its symbol characteristics. You specify symbol characteristics in Longview Application Administrator. For information on creating, modifying, and deleting symbols, see the *Longview Application Administrator Guide.*

Preparing Your System for Longview Analysis and Reporting and Input

Use Longview Analysis and Reporting to view and analyze Longview data in reports. Use Longview Input to submit data to the Longview database.

Before the users of the application can start to work, the System Administrator must perform a few preparation tasks in Longview Application Administrator.

Specifying settings in Longview Application Administrator

Before users can use Longview Analysis and Reporting, your System Administrator must use Longview Application Administrator to specify the appropriate type of access for each user group. Only the System Administrator can perform this task.

Settings for Longview Analysis and Reporting

To use Longview Application Administrator to specify settings for Longview Analysis and Reporting, follow these steps.

1. If you are not already in Longview Application Administrator, start that component by clicking on its icon in Longview Component Manager.
2. In the Server Explorer pane, click on either Users or Groups, depending on whether you want to give permissions to a particular user, or to a user group. The list of existing users, or groups, is displayed in the work pane.
3. Select the user or group you want to give Longview Analysis and Reporting permissions to and double-click it to open its properties dialog.
4. Select the Authorization tab.
5. Select Application Access. The list of available applications is displayed
6. Select Longview Analysis & Reporting (if it is cleared) and select a role for the user or group. The choices are:

Reporting role	Tasks
Report Publisher	Sets the general content, criteria, and format of the report templates that Report Users use to analyze data and run reports.
Report Author	Populates Data Views with data for analysis purposes, and then runs reports either individually or in batches.
Report User	Uses the report templates created by the Report Publisher to analyze data and run reports.

7. When you are finished, click OK. For more information, see the Longview Application Administrator Guide.

Specifying attributes in Longview Application Administrator

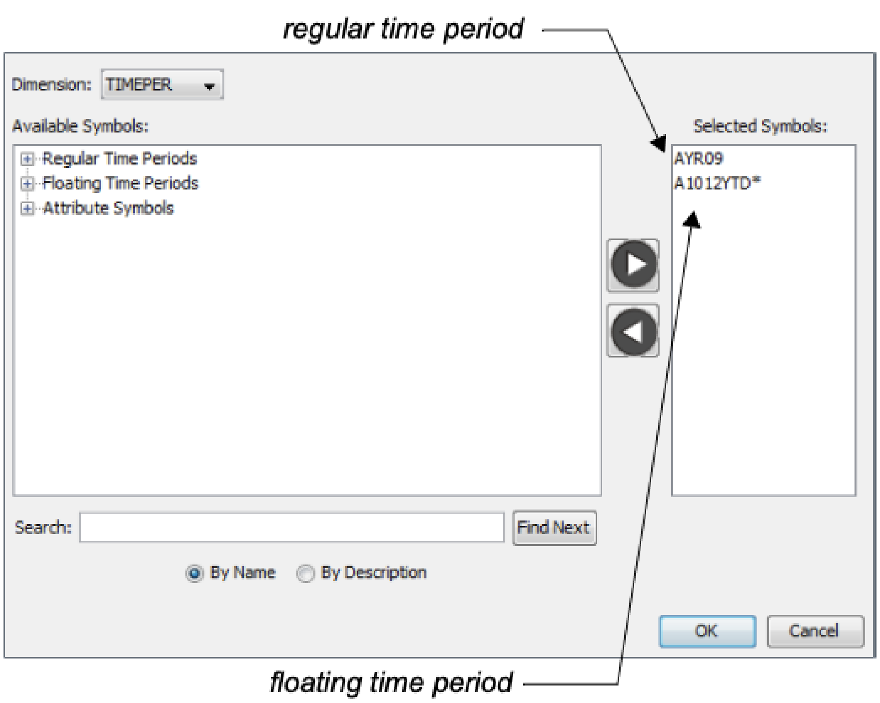
It is your responsibility to prepare your Longview system to allow users to access the application components they require. In the case of Longview Analysis and Reporting and Longview Input, you need to prepare an attribute and a static schedule to permit a particular type of activity.

SGPFloatingTimePeriods attribute for floating time period symbols

If the users of the application have many standard reports that they want to reuse in the next calendar month or fiscal year, they can use floating time period symbols in these reports. A floating time period symbol ensures that they each show the correct month and year when the database is updated during a rollover.

For example, let’s say you have 100 reports containing year 2009 time period symbols, and you want to use these same reports in the year 2010. If you used regular time period symbols, you would have to go into each of these reports and manually change the time period symbols from 2009 to 2010. However, if you use floating time periods, the symbols update automatically when the database is rolled over to the next year.

When preparing a report in the application, you select time period symbols in the Symbol Selection dialog. You have the option of selecting either regular time period symbols or floating time period symbols.



An asterisk is added to the symbol name to identify it as a floating time period symbol.

To allow users of the application to use floating time periods, you must set them up in Longview Application Administrator.

To prepare floating time periods, follow these steps.

1. Find the attribute SGPFloatingTimePeriods.
2. Set the values for SGPFloatingTimePeriods as a list of attributes. The list consists of attributes that each represent one time period symbol that gets updated, either manually or automatically, during the various rollover processes (month-end, year-end, and so on). Separate each attribute with a pipe symbol (|). For example: SGPCurrentPeriod|SGPCurrentYear
3. Depending on the number of values you need to include, select the appropriate method.
   - If you use the Attribute dialog in Longview Application Administrator to set the values of the attribute, you are limited to a certain number of characters. If you exceed the maximum, the list is automatically truncated.
   - If you use a command and an ASCII file to set the values of the attribute, there is no limit.
4. Select attributes that represent a fully defined time period (for example, AYR10, P10Q1).
   - You cannot use attributes that represent only parts of time symbols (for example, 2010, 10).
   - You cannot combine multiple attributes that have partial time symbol names to make a full one.

UAccSchedules attribute to specify access to schedules

To give users access to schedules in the application, you must select those schedules for the attribute UAccSchedules set in Longview Application Administrator. You can select schedules individually or set the attribute to ALL to give users access to all non-system schedules.

Attribute symbol selection

When selecting both base and schedule symbols for Longview Analysis and Reporting templates, Publishers can select attributes instead of symbols. These attributes can be used to automate the subsequent symbol selections of other users.

For each type of attribute (System, Symbol, and User), there are 16 attributes corresponding to 16 dimensions, resulting in 48 attributes.

```
SGPD#AttrSys

SGPD#AttrSym

SGPD#AttrUser
```

where:

- # can be 0-15 representing each of the possible sixteen dimensions in a Longview system.

Working with Longview Analysis and Reporting Files

In Longview Analysis and Reporting, the tasks you perform and the functionality to which you have access depend on the role you have been assigned.

Your role in the reporting process

In Longview Analysis and Reporting, you perform tasks based on a role assigned to your individual user ID or user group (if you are using V3 compatibility — for more information, see the Longview Application Administrator Guide).

People who need to analyze data, and prepare or run reports are assigned one of three roles:

Reporting role	Tasks
Report Publisher	Sets the general content, criteria, and format of the report templates that Report Users use to analyze data and run reports.
Report Author	Populates DataViews with data for analysis purposes, and then runs reports either individually or in batches.
Report User	Uses the report templates created by the Report Publisher to analyze data and run reports.

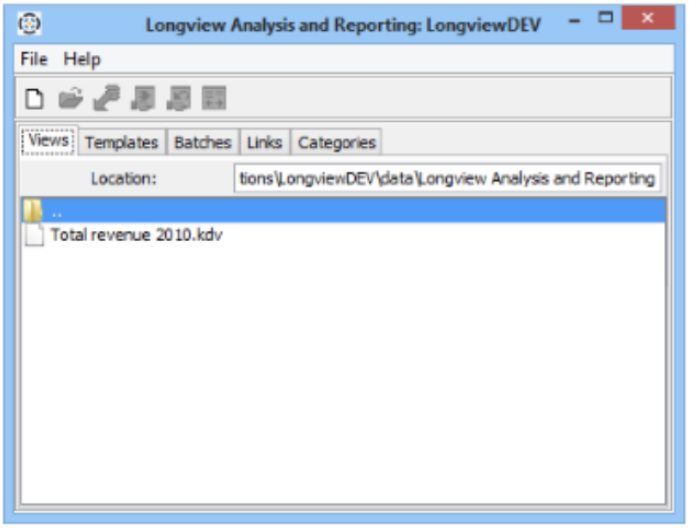
Your System Administrator uses Longview Application Administrator to assign your role. If you think your role has been assigned incorrectly, see your System Administrator.

Your starting point

In Longview Analysis and Reporting, your starting point is the Longview Analysis and Reporting dialog. The appearance of this dialog depends on your role — Report Publisher, Report Author, or Report User.

Report Publishers and Report Authors

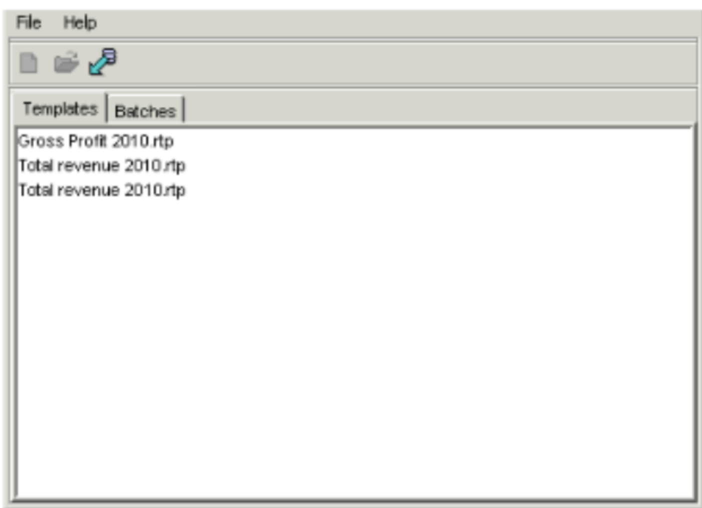
If you are a Report Publisher or Report Author, the Longview Analysis and Reporting dialog contains tabs for **Views**, **Templates**, **Batches**, **Links**, and **Categories**.



Files are listed numerically and alphabetically.

Report Users

If you are a Report User, the Longview Analysis and Reporting dialog contains tabs for **Templates** and **Batches**.



Files are listed numerically and alphabetically.

In this chapter, you can find information on these main topics:

- Understanding file types and dimensions
- Creating templates and DataViews
- Opening templates and DataViews
- Refreshing templates and DataViews

- Saving templates and DataViews
- Deleting templates and DataViews

Understanding file types and dimensions

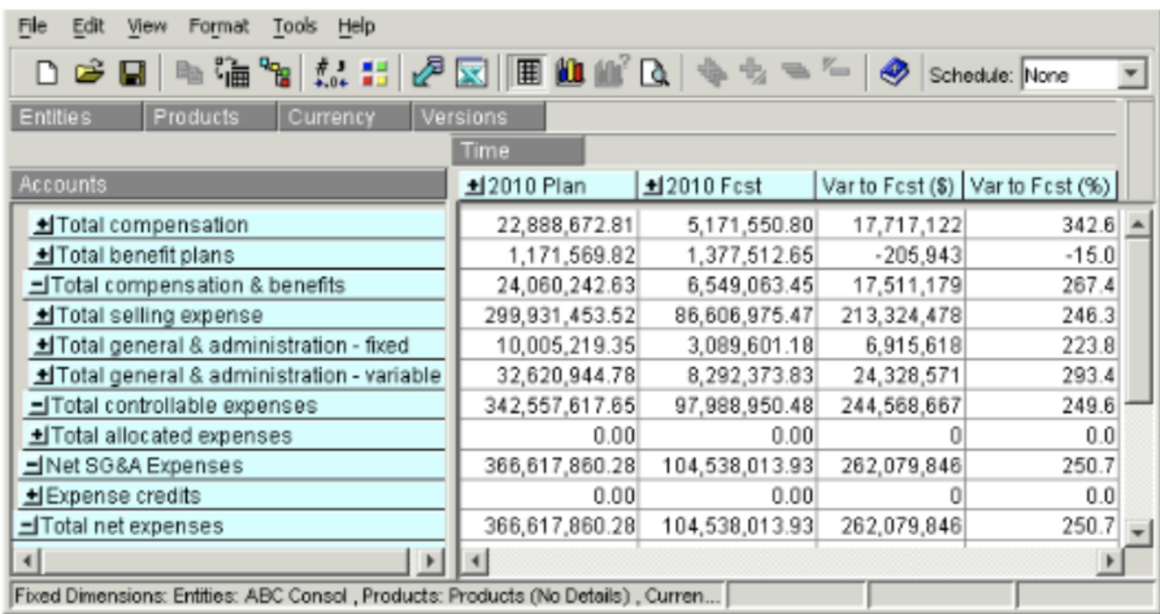
In Longview Analysis and Reporting, you can work with various file types.

- report templates (.rtp)
- DataViews (.kdv)
- report batches (.rbt)

While the types of files to which you have access depends on your role in the reporting process, both report templates and DataViews share some basic common characteristics.

Report templates (rtp)

In Longview Analysis and Reporting, Report Publishers create the report templates that set the general criteria for the content and format of the reports that Report Users access for their tasks.



Accounts	2010 Plan	2010 Fcst	Var to Fcst ($)	Var to Fcst (%)
Total compensation	22,888,672.81	5,171,550.80	17,717,122	342.6
Total benefit plans	1,171,569.82	1,377,512.65	-205,943	-15.0
Total compensation & benefits	24,060,242.63	6,549,063.45	17,511,179	267.4
Total selling expense	299,931,453.52	86,606,975.47	213,324,478	246.3
Total general & administration - fixed	10,005,219.35	3,089,601.18	6,915,618	223.8
Total general & administration - variable	32,620,944.78	8,292,373.83	24,328,571	293.4
Total controllable expenses	342,557,617.65	97,988,950.48	244,568,667	249.6
Total allocated expenses	0.00	0.00	0	0.0
Net SG&A Expenses	366,617,860.28	104,538,013.93	262,079,846	250.7
Expense credits	0.00	0.00	0	0.0
Total net expenses	366,617,860.28	104,538,013.93	262,079,846	250.7

All data in report templates is read-only.

When published to the database, Report Users can access the template to run their reports either individually or in batches. However, they see the template in report view format only.

2010/10/07

Total revenue 2010

(in 000s)

	Jan 10	Feb 10	Mar 10	Qtr 1 10
Product revenue - ext	4,000.00	3,536.52	3,919.73	11,456.25
Discounts & allowances	-111.93	-114.17	-117.59	-343.69
Net product revenue - ext	**3,888.07**	**3,422.35**	**3,802.14**	**11,112.56**
Product revenue - I/C	20,969.92	20,969.91	20,969.92	62,909.74
Product revenue	**24,857.99**	**24,392.26**	**24,772.06**	**74,022.30**
Service revenue - ext	932.74	951.39	979.93	2,864.06
Service revenue - I/C	9,785.96	9,785.96	9,785.96	9,785.96
Service revenue	**10,718.70**	**9,785.96**	**10,765.89**	**9,785.96**
Other (non-product) revenue	559.64	570.84	587.96	1,718.44
Total revenue	**36,136.32**	**9,785.96**	**36,125.91**	**9,785.96**

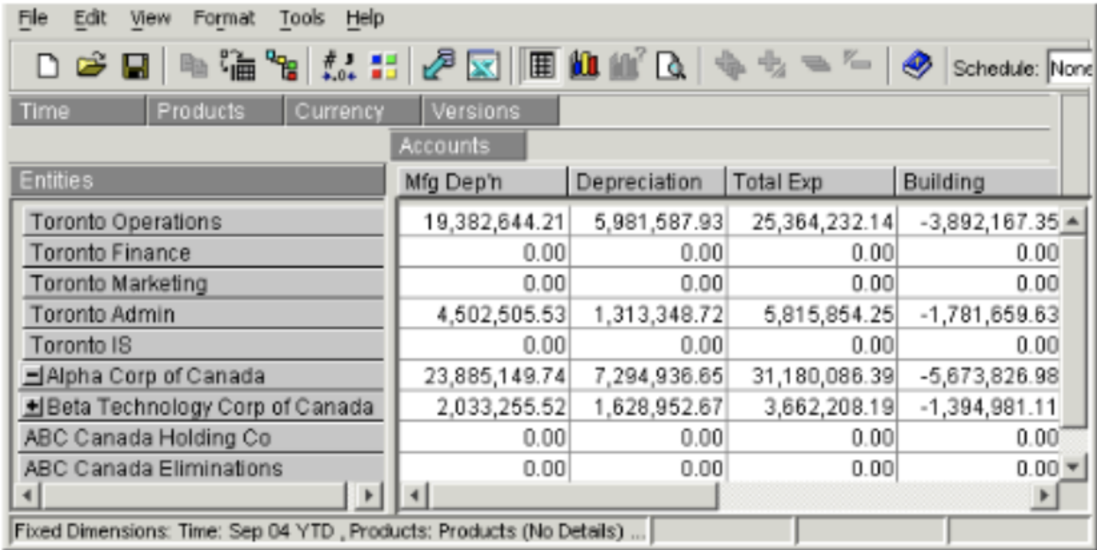
ENTITIES : Chi Mfg
CURRENCY : USD Source
CONTROLS : Current Working Scenario
PRODUCTS : Unallocated and Balance Sheet Data

Report Users cannot create report templates. They can only view the templates the Report Publisher has published to the database, in report view format. For more information, see Designing reports.

DataViews (kdv)

In Longview Analysis and Reporting, Report Publishers and Report Authors can create DataViews for their own analysis purposes.

DataViews are similar to report templates and have the same functionality. However, they cannot be published to the database, and can only be saved locally.

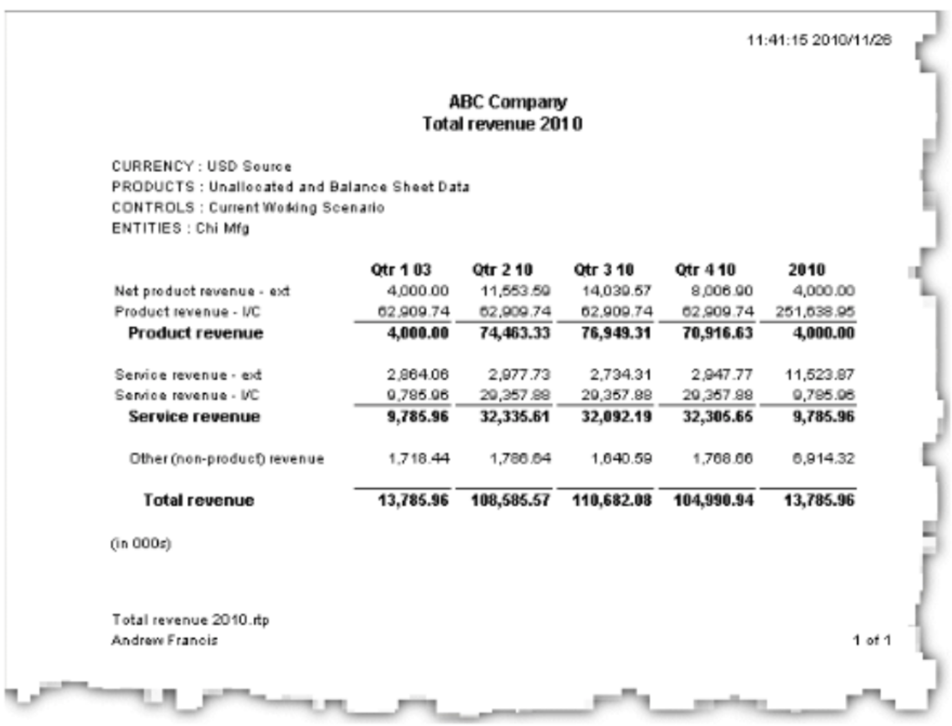


Entities	Mfg Dep'n	Depreciation	Total Exp	Building
Toronto Operations	19,382,644.21	5,981,587.93	25,364,232.14	-3,892,167.35
Toronto Finance	0.00	0.00	0.00	0.00
Toronto Marketing	0.00	0.00	0.00	0.00
Toronto Admin	4,502,505.53	1,313,348.72	5,815,854.25	-1,781,659.63
Toronto IS	0.00	0.00	0.00	0.00
Alpha Corp of Canada	23,885,149.74	7,294,936.65	31,180,086.39	-5,673,826.98
Beta Technology Corp of Canada	2,033,255.52	1,628,952.67	3,662,208.19	-1,394,981.11
ABC Canada Holding Co	0.00	0.00	0.00	0.00
ABC Canada Eliminations	0.00	0.00	0.00	0.00

All data in DataViews is read-only.

Report batches (rbt)

In Longview Analysis and Reporting, both report templates and DataViews can be viewed and formatted in report view format.


11:41:15 2010/11/26

ABC Company
Total revenue 2010

CURRENCY : USD Source
PRODUCTS : Unallocated and Balance Sheet Data
CONTROLS : Current Working Scenario
ENTITIES : Chi Mfg

	Qtr 1 03	Qtr 2 10	Qtr 3 10	Qtr 4 10	2010
Net product revenue - ext	4,000.00	11,553.59	14,039.57	8,006.90	4,000.00
Product revenue - I/C	62,909.74	62,909.74	62,909.74	62,909.74	251,638.95
Product revenue	**4,000.00**	**74,463.33**	**76,949.31**	**70,916.63**	**4,000.00**
Service revenue - ext	2,864.06	2,977.73	2,734.31	2,947.77	11,523.87
Service revenue - I/C	9,785.96	29,357.88	29,357.88	29,357.88	9,785.96
Service revenue	**9,785.96**	**32,335.61**	**32,092.19**	**32,305.65**	**9,785.96**
Other (non-product) revenue	1,718.44	1,786.64	1,640.59	1,768.66	6,914.32
Total revenue	**13,785.96**	**108,585.57**	**110,682.08**	**104,990.94**	**13,785.96**

(in 000s)

Total revenue 2010.rtp
Andrew Francis
1 of 1

Note: When Report Users open report templates published by the Report Publisher, they see the template only in report view format.

Individually, reports can be printed, or saved as .pdf or .png files.

However, if you have many standard reports that must be run at regular intervals, you can automate the process using batch files. When a batch file is run, each report in the batch is either printed, or saved as a .pdf or .png file to a location of your choosing.

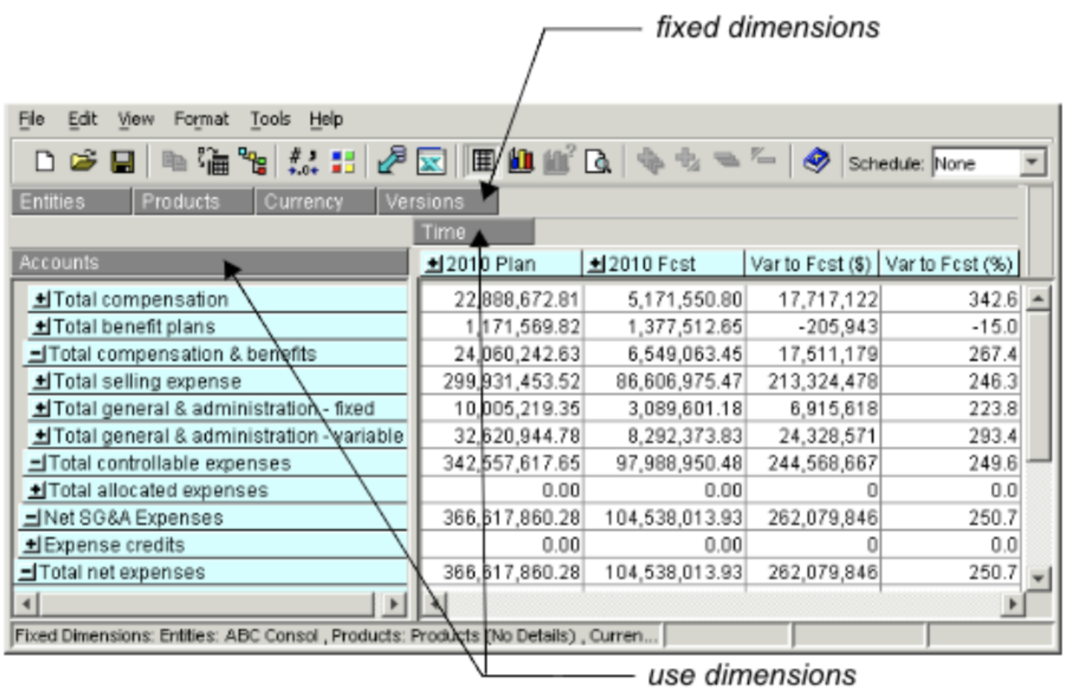
For more information, see Working with report batches.

Use and fixed dimensions

Within a report template or DataView, there are two types of dimensions:

- The ***use dimensions*** are those that are visible in either the down or across directions of the template or DataView. You can choose to display as many symbols as you want in these dimensions. Also, you can have more than one dimension in the down and across directions at the same time.

- The ***fixed dimensions*** are used to complete the database coordinates of the symbols and data to include in the template. These can contain no more than one symbol at a time.

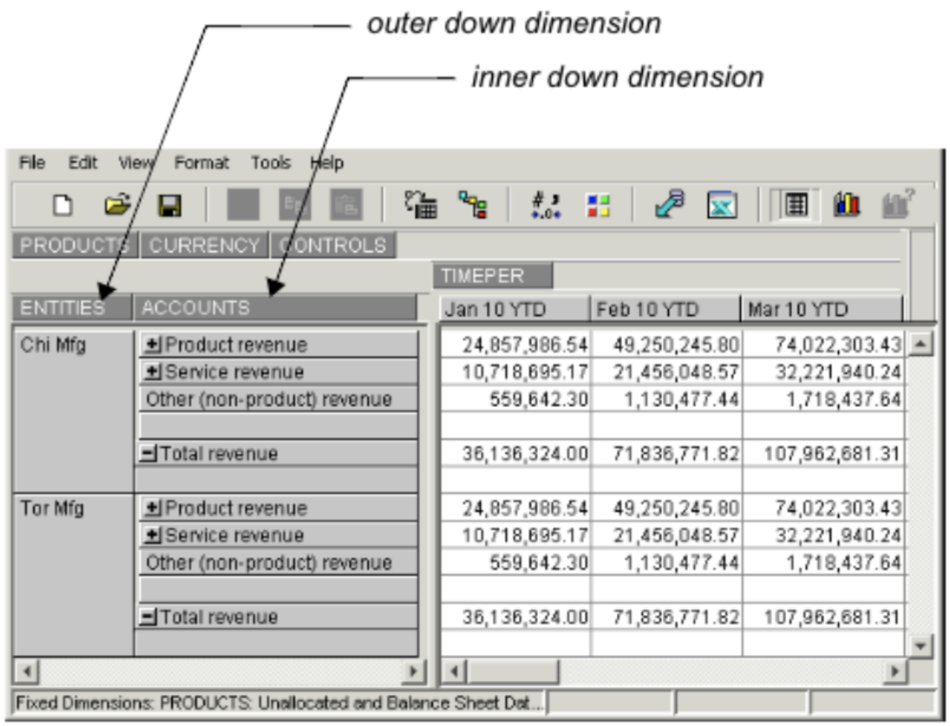


Inner and outer dimensions

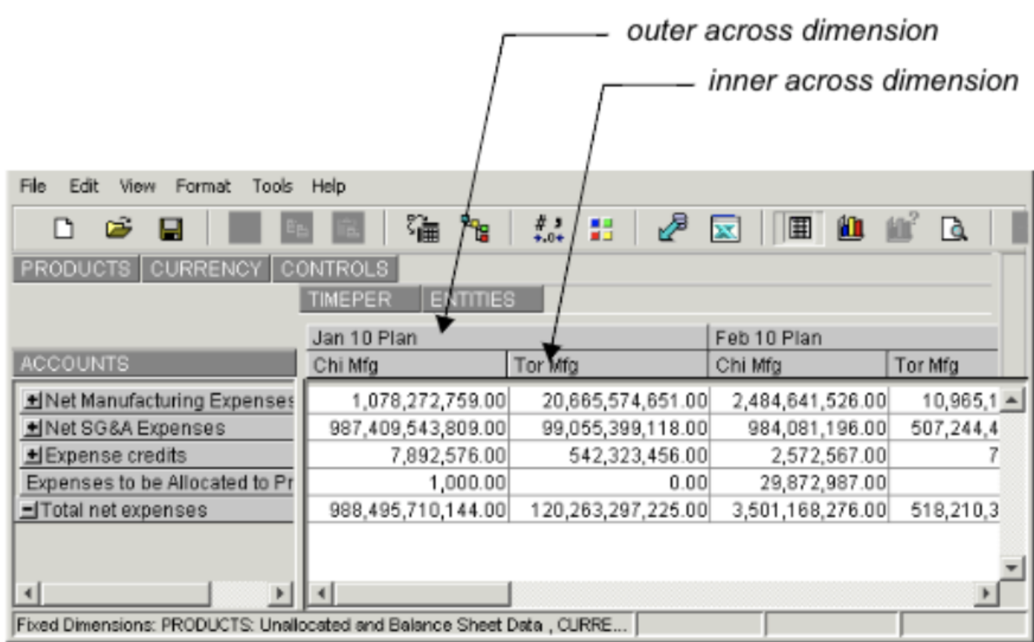
In Longview Analysis and Reporting, you have the option of including more than one dimension in either the down direction or across direction. For example, if you want to see data for multiple accounts in multiple entities, you may want to identify multiple dimensions for the down dimension.

If there is more than one dimension in either the down or across directions, the innermost dimension (the one closest to the data), is called the ***inner dimension***. Each of the others is called an ***outer dimension***.

The following illustration shows the inner and outer dimensions in the down direction.

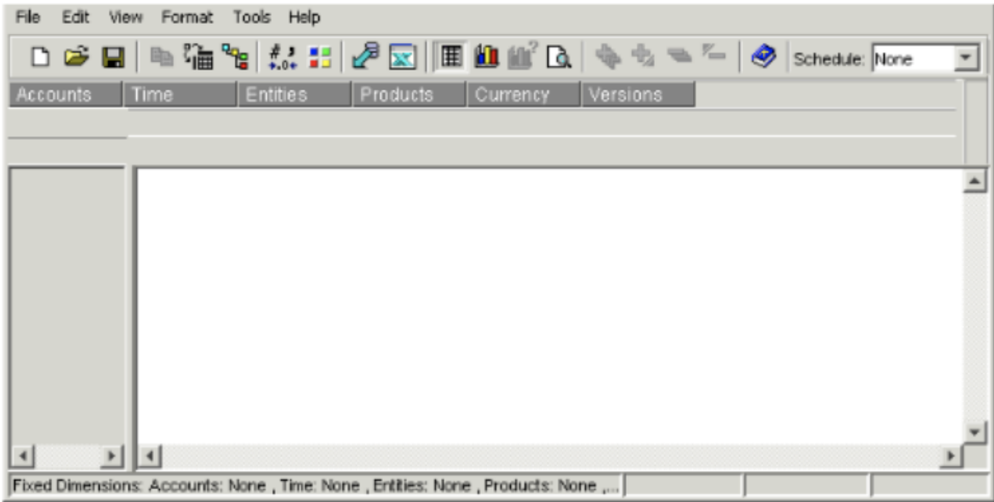


The following illustration shows the inner and outer dimensions in the across direction. The inner across dimension is the right-most dimension in the list.



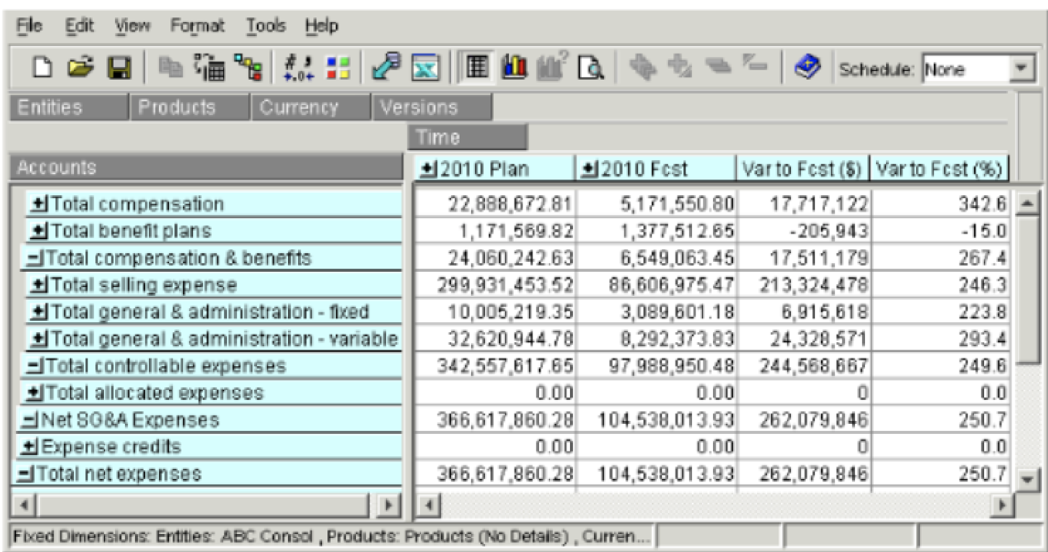
Creating templates and DataViews

Regardless of whether you are building report templates or DataViews, the common starting point is called a view.



Notice that initially, there is no file type associated with the view in the title bar.

It is only when you save the view that you must decide what type of file it must be. For example, the following view has been saved as a report template.



The file’s type is identified by its file name extension (.rtp) in the title bar.

Creating a report template

As Report Publisher, it is your responsibility to create the report templates that are the basis for the activities of Report Users.

Depending on your role, you may be able to create a report template.

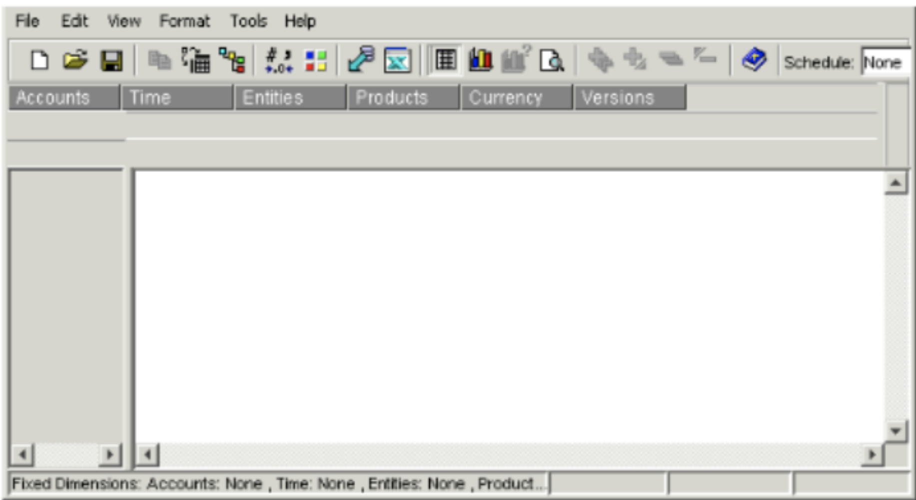
Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

The procedure you use depends on your starting point.

From the Longview Analysis and Reporting dialog

To create a report template from the Longview Analysis and Reporting dialog, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the Views tab.
2. Choose File > New. A blank view appears.



   You are now ready to work with the content and appearance of the template.

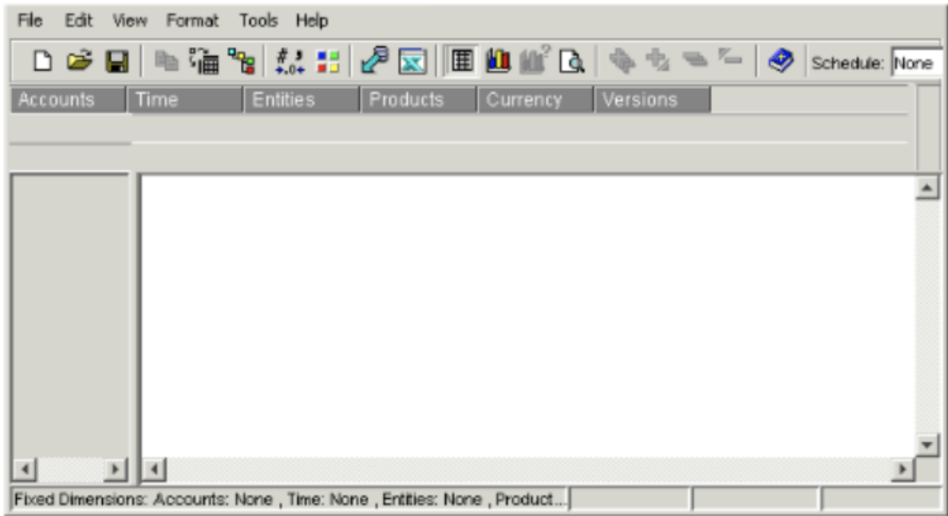
3. When you save the file, be sure to save it in report template format. For more information, see Saving a report template - Report Publishers.

From the view window

To create a report template from a currently open view window, follow these steps.

1. In the view window, do one of the following:
   - To create a report template in the current window, choose File > New >Replace this window. A confirmation dialog may appear asking if you want to save changes to the open view. Click Yes or No as necessary.
   - To create a report template in a different window without closing the open view, choose File > New > Open in new window.

2. A blank view appears.



You are now ready to work with the content and appearance of the view.

3. When you save the file, be sure to save it in report template format. For more information, see Saving a report template - Report Publishers.

Creating a DataView

As Report Publisher or Report Author, you can create local DataViews for your own data analysis and report requirements.

Depending on your role, you may be able to create a DataView.

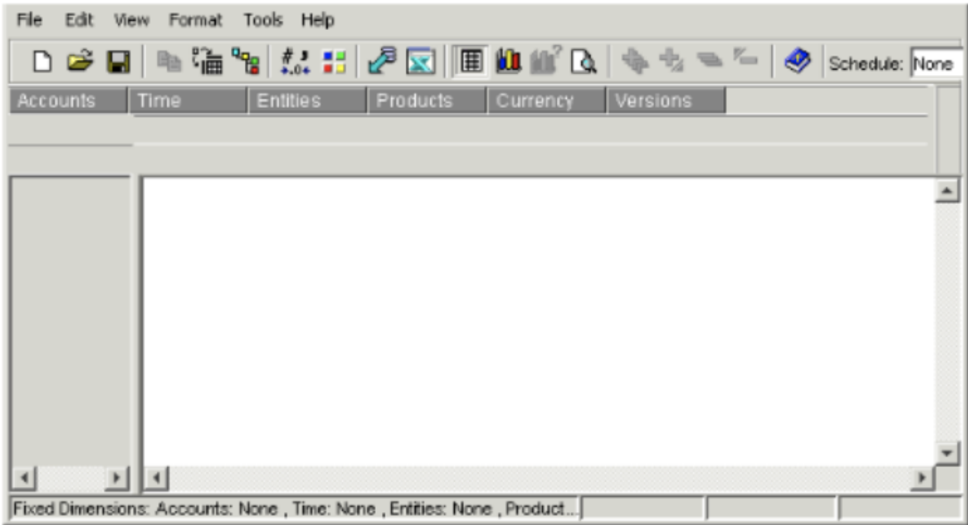
Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

The procedure you use depends on your starting point.

From the Longview Analysis and Reporting dialog

To create a DataView from the Longview Analysis and Reporting dialog, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the Views tab.
2. Choose File > New. A blank view appears.



   You are now ready to work with the content and appearance of the view.

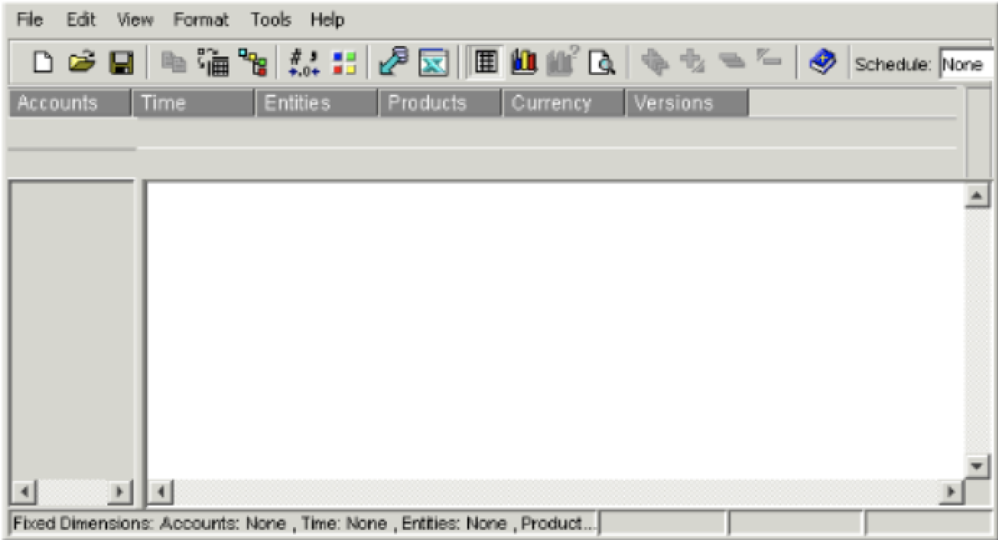
3. When you save the file, be sure to save it in DataView format. For more information, see Saving a DataView.

From the view window

To create a DataView from a currently open view window, follow these steps.

1. In the view window, do one of the following:
   - To create a DataView in the current window, choose File > New > Replace this window. A confirmation dialog may appear asking if you want to save changes to the open view. Click Yes or No as necessary.
   - To create a DataView in a different window without closing the open view, choose File > New > Open in new window.

2. A blank view appears.



You are now ready to work with the content and appearance of the view.

3. When you save the file, be sure to save it in DataView format. For more information, see Saving a DataView.

Opening templates and DataViews

The types of files you can open in Longview Analysis and Reporting depend on your role.

Role	Can perform this task?
Report Publisher	Yes, either the local version or the published version. If you open the published version, the local version is created automatically.
Report Author	Yes. Follow the procedure in Opening a report template - Report Authors.
Report User	Yes. Follow the procedure in Opening a report template - Report Users.

For more information on types of files, see Understanding file types and dimensions.

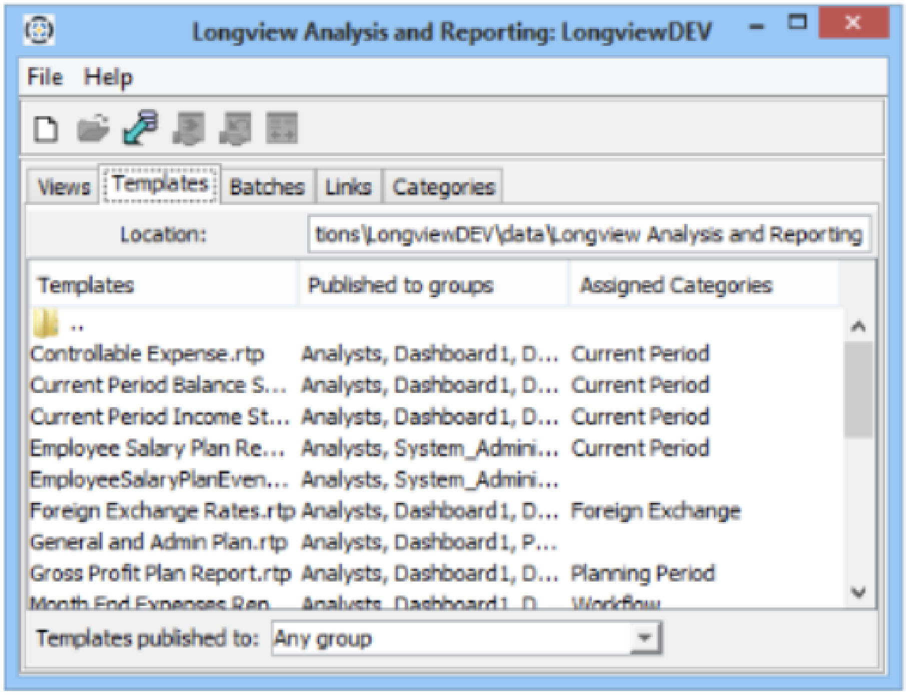
Opening a report template - Report Publishers

The procedure you use depends on your starting point.

From the Longview Analysis and Reporting dialog

To open an existing report template from the Longview Analysis and Reporting dialog, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Templates** tab. A list of existing report templates appears.



Files are listed numerically and alphabetically.

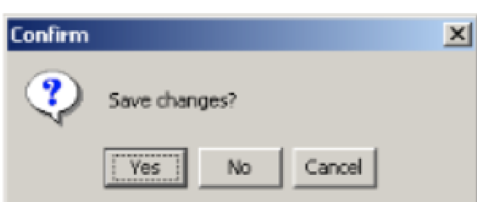
2. To see all your existing templates, select **Any Group** in the **Templates published** to field.
3. Select the report template to open and choose File > Open. The report template appears.

From the view window

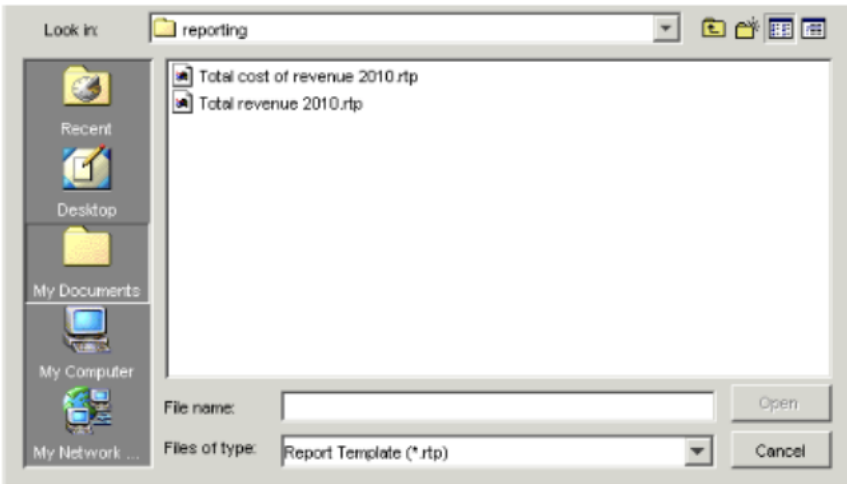
Only Report Publishers and Report Authors can open a report template from the view window.

To open an existing report template from a view window, follow these steps.

1. In the view window, choose File > Open. If you have any unsaved changes in the view currently open, a confirmation dialog appears prompting you to save those changes.



2. Click Yes or No as desired. The Open dialog appears.



3. Complete these fields:

Field	Description
Look in	Select the folder containing the view you want to open. The default is the reporting folder.
Files of type	Select Report Template (*.rtp). A list of existing report templates appears.
File name	Select the report template from the list.

4. Click Open. The report template appears.

Opening a report template - Report Authors

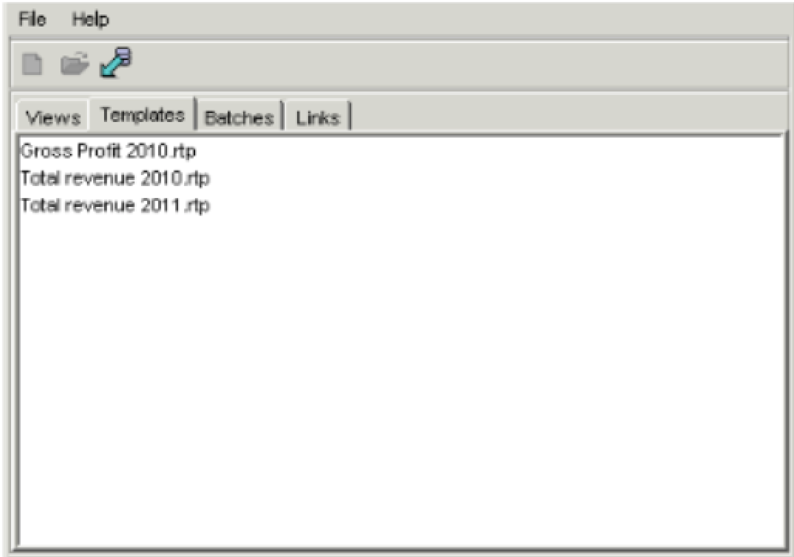
Depending on your role, you may be able to open report templates.

Role	Can perform this task?
Report Publisher	Yes. Follow the procedure in Opening a report template • Report Publishers.
Report Author	Yes, to access published templates.
Report User	Yes. Follow the procedure in Opening a report template • Report Users.

For more information on types of files, see Understanding file types and dimensions.

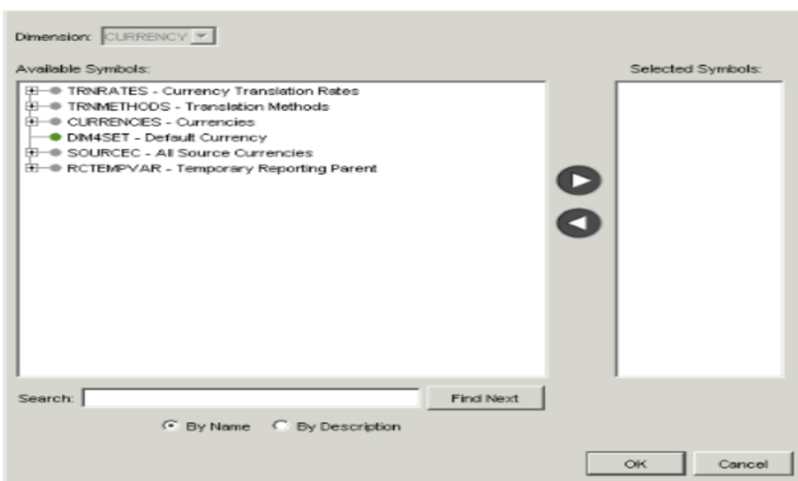
To open a published report template, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Templates** tab. A list of report templates published to your group appears.



Files are listed numerically and alphabetically.

2. Select the report template to open and choose File > Open.
   - If symbols have already been selected for each dimension in the template, the template appears.
   - If there are currently no symbols selected in one or more of the dimensions, the Symbol Selection dialog appears. Proceed to step 3.



3. Complete the following:

Field	Description
Available Symbols and Selected Symbols	Find symbols in the Available Symbols list and click the arrow to move them to the Selected Symbols list. You may select as many symbols as necessary. If you want to prompt Report Users or Input Contributors to select symbols for a particular dimension (for example, an entity) when they open the template, do not select a symbol for that dimension. You must remember however, to make sure users are allowed to select symbols for that dimension when you publish the template. You can change the order of the symbols in the Selected Symbols list. Simply click and hold, and then drag the symbol to its desired place. Depending on how your system is set up, Publishers may have the ability to select attributes instead of symbols. These attributes can be used to automate the selection of specified symbols in the templates that Report Users have access to.

4. You can search for symbols in several ways:

To search	Do this
Through the hierarchy	Click on symbol names in the hierarchy to drill down to the appropriate symbol. Parent symbols that you can expand, and collapse are identified by a grey circle beside them.
By name	Start to type its name in the **Search** field. (You do not have to worry about case-sensitivity.) The application finds the first symbol whose name contains the letters you typed. To find the next occurrence, click Find Next.
By description	Select **By Description** and start to type its description in the **Search** field. (You do not have to worry about case-sensitivity.) The application finds the first symbol whose description contains the letters you typed. To find the next occurrence, click Find Next.

5. Click OK. If there are more dimensions for which symbols have not been selected, the Symbol Selection dialog reappears. Repeat step 3 to step 5 for each dimension you are prompted to select symbols for. When you are finished selecting symbols, the report template appears.

Opening a report template - Report Users

Depending on your role, you may be able to open report templates.

Role	Can perform this task?
Report Publisher	Yes. Follow the procedure in Opening a report template - Report Publishers.
Report Author	Yes. Follow the procedure in Opening a report template - Report Authors.
Report User	Yes, to access published templates in report view format.

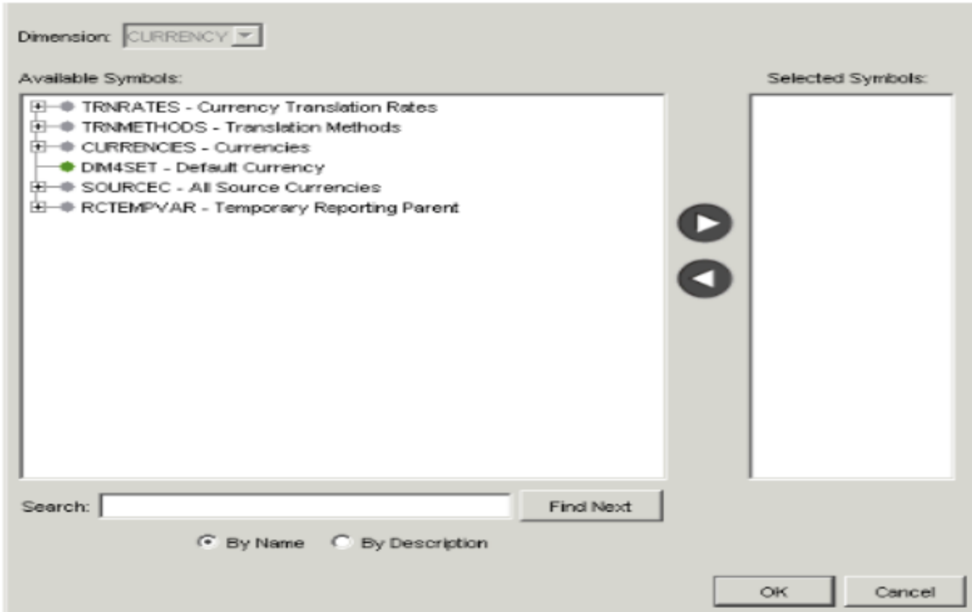
For more information on types of files, see Understanding file types and dimensions.

To open an existing report template, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Templates** tab. A list of report templates published to your group appears.

   Files are listed numerically and alphabetically.

2. Select the report template to open and choose File > Open.
   - If you are not allowed to select any symbols in the report, the report appears. You can proceed to analyze the data and print the report. For more information, see Designing reports.
   - If you are allowed to select symbols in the report, but symbols have already been selected for each dimension, the report appears. You can proceed to analyze the data and print the report. For more information, see Designing reports.
   - If you are allowed to select symbols for your report, and there are currently no symbols selected in one or more of the dimensions, the Symbol Selection dialog appears. Proceed to step 3.



3. Complete the following:

Field	Description
Available Symbols and Selected Symbols	Find symbols in the Available Symbols list and click the arrow to move them to the Selected Symbols list. You may select as many symbols as necessary. If you want to prompt Report Users or Input Contributors to select symbols for a particular dimension (for example, an entity) when they open the template, do not select a symbol for that dimension. You must remember however, to make sure users are allowed to select symbols for that dimension when you publish the template. You can change the order of the symbols in the Selected Symbols list. Simply click and hold, and then drag the symbol to its desired place. Depending on how your system is set up, Publishers may have the ability to select attributes instead of symbols. These attributes can be used to automate the selection of specified symbols in the templates that Report Users have access to.

4. You can search for symbols in several ways:

To search	Do this
Through the hierarchy	Click on symbol names in the hierarchy to drill down to the appropriate symbol. Parent symbols that you can expand, and collapse are identified by a grey circle beside them.
By name	Start to type its name in the Search field. (You do not have to worry about case-sensitivity.) The application finds the first symbol whose name contains the letters you typed. To find the next occurrence, click Find Next.

To search	Do this
By description	Select By Description and start to type its description in the Search field. (You do not have to worry about case-sensitivity.) The application finds the first symbol whose description contains the letters you typed. To find the next occurrence, click Find Next.

5. Click OK. If there are more dimensions for which symbols have not been selected, the Symbol Selection dialog reappears. Repeat step 3 to step 5 for each dimension you are prompted to select symbols for.

6. When you are done selecting symbols, the report template appears. You can proceed to analyze the data and print the report. For more information, see Designing reports.

Opening a DataView

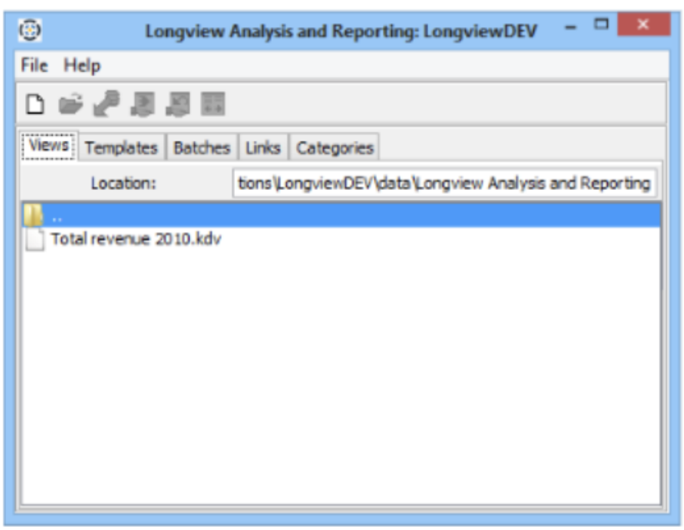
Depending on your role, you may be able to open DataViews.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

For more information on types of files, see Understanding file types and dimensions.

To open an existing DataView from the Longview Analysis and Reporting dialog, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the Views tab. A list of all your locally saved DataViews appears.



Files are listed numerically and alphabetically.

2. Select the DataView to open and choose File > Open. The DataView appears.

Refreshing templates and DataViews

You can use the refresh features in Longview Analysis and Reporting to ensure that you are viewing and using the most recently published versions of templates, as well as the most current data in other types of files.

Refreshing report templates - Report Publishers

You can use the refresh feature to restore the content of the local version of a report ***template*** with the most recently published version of the file.

For example, let's say you publish a report template to the database, and then make changes to your local copy. If you decide at a later time that you do not want to publish those changes, you may want to make your local copy match the published one on the database.

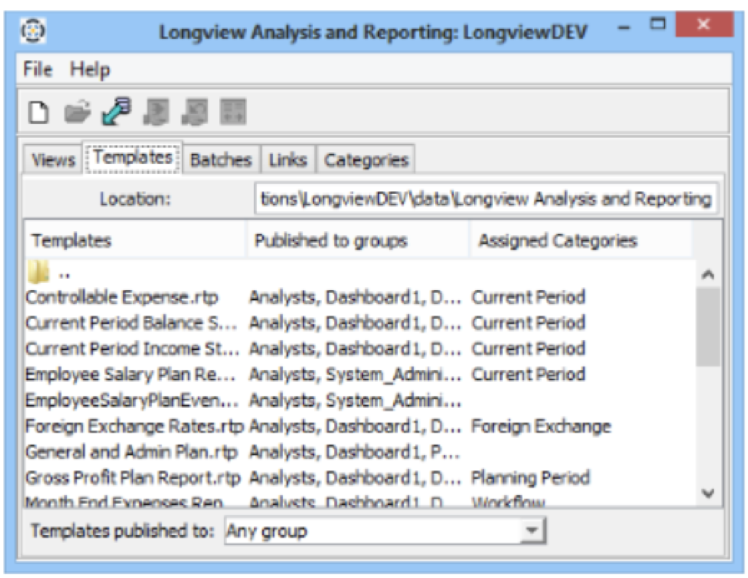
You can also refresh just the data content of report templates that you currently have open, on an individual basis.

Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

Restoring a local report template

To restore the structure and content of a local report template, so that it matches the currently published version, follow these steps.

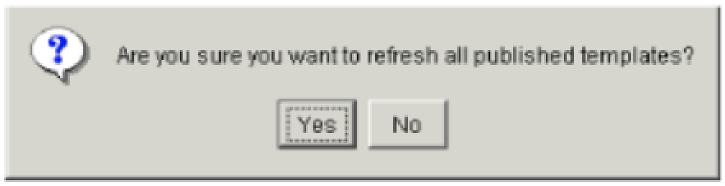
1. In the Longview Analysis and Reporting dialog, click the ***Templates*** tab.



2. For ***Templates published*** to select the group to which you published the report template, the local version of which you want to restore. A list of report templates published to that group appears. For a list of all report templates, select **Any group**.

3. Do one of the following:

   - To restore all local report templates that have been published, make sure none of the templates in the list is selected (if any template is selected, you can clear it by holding down the Ctrl key and clicking it), and choose Tools > Refresh Data. A confirmation dialog appears.

     Click Yes. The local versions of all published report templates are restored to show the content of the published versions.

   - To restore a single local report template, select it in the list and choose Tools > Refresh Data. The local version of the template is restored to show the content of the published version.

Refreshing the data content of an open report template

To refresh the data content of a report template while it is open, choose Tools >Refresh Data. The data content of the template is refreshed.

Refreshing report templates - Report Publishers

You can use the refresh feature to restore the content of the local version of a report ***template*** with the most recently published version of the file.

For example, let’s say you publish a report template to the database, and then make changes to your local copy. If you decide at a later time that you do not want to publish those changes, you may want to make your local copy match the published one on the database.

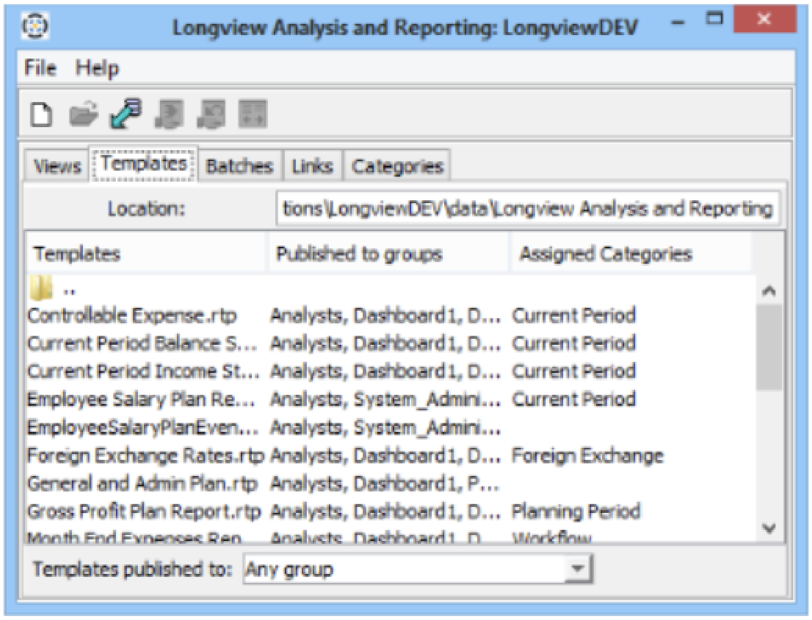
You can also refresh just the data content of report templates that you currently have open, on an individual basis.

Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

Restoring a local report template

To restore the structure and content of a local report template, so that it matches the currently published version, follow these steps.

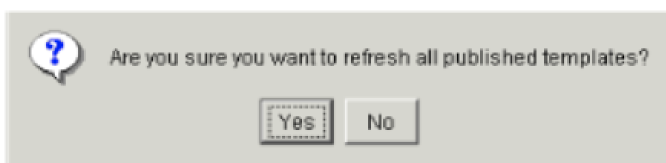
1. In the Longview Analysis and Reporting dialog, click the ***Templates*** tab.



2. For ***Templates published*** to select the group to which you published the report template, the local version of which you want to restore. A list of report templates published to that group appears. For a list of all report templates, select **Any group**.

3. Do one of the following:

   - To restore all local report templates that have been published, make sure none of the templates in the list is selected (if any template is selected, you can clear it by holding down the Ctrl key and clicking it), and choose Tools > Refresh Data. A confirmation dialog appears.

     Click Yes. The local versions of all published report templates are restored to show the content of the published versions.

   - To restore a single local report template, select it in the list and choose Tools > Refresh Data. The local version of the template is restored to show the content of the published version.

Refreshing the data content of an open report template

To refresh the data content of a report template while it is open, choose Tools >Refresh Data. The data content of the template is refreshed.

Refreshing report templates - Report Authors

You can use the refresh feature to refresh the structure and content of all report templates published to your group. You can also refresh just the data content of report templates that you currently have open, on an individual basis.

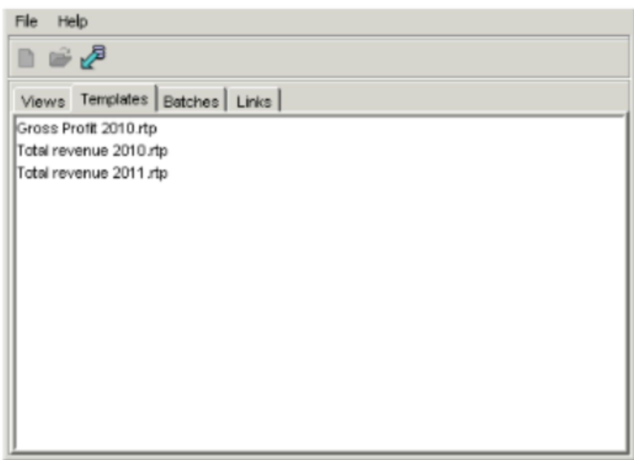
Role	Can perform this task?
Report Publisher	no
Report Author	yes
Report User	no

Refreshing all published report templates

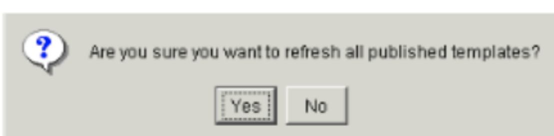
You can use the refresh feature to refresh the structure and content of all report templates published to your group. This ensures that you are accessing the most recently published versions of those templates.

To refresh the structure and content of all report templates published to your group, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Templates** tab.



2. Choose File > Refresh. A confirmation dialog appears.



3. Click Yes. All report templates published to your group are refreshed.

Refreshing the data content of an open report template

To refresh the data content of a report template while it is open, choose Tools >Refresh Data. The data content of the template is refreshed.

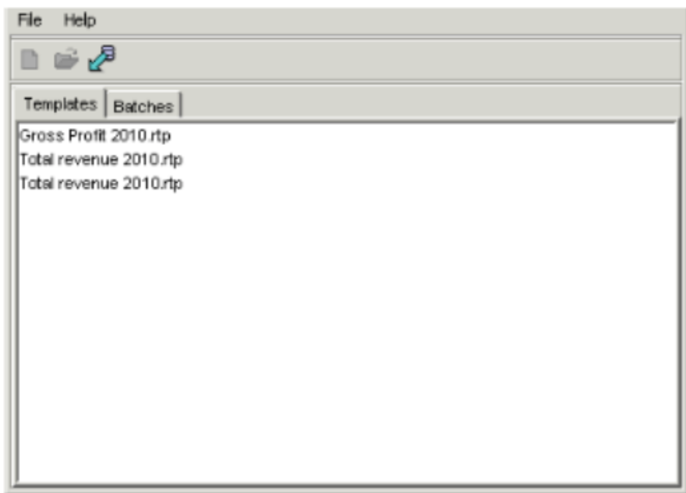
Refreshing report templates - Report Users

You can use the refresh feature to refresh the structure and content of all report templates published to your group. This ensures that you are accessing the most recently published versions of those templates.

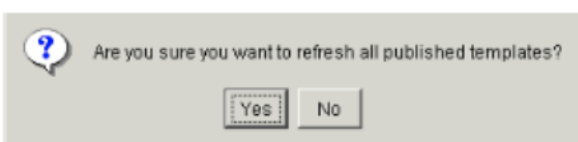
Role	Can perform this task?
Report Publisher	no
Report Author	no
Report User	yes

To refresh the structure and content all report templates published to your group, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Templates** tab.



2. Choose File > Refresh. A confirmation dialog appears.



3. Click Yes. All report templates published to your group are refreshed.

Refreshing DataViews

You can refresh the data content of an open DataView so that it displays the most current database data.

To refresh the data content of an open DataView, choose Tools > Refresh Data. The data content of the DataView is refreshed.

Saving templates and DataViews

While you are working on a view, or when you are finished, you can save it. You can save it in several different formats, depending on the component you are using and your role.

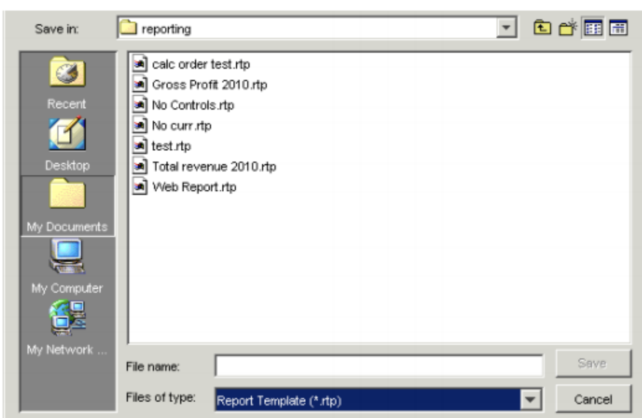
Saving a report template - Report Publishers

You can save a report template locally before publishing it to the database. When you save a template for the first time, you are prompted to define the dimensions in which users can select and drill into the symbols in the published report.

Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

To save a view in report template format, follow these steps.

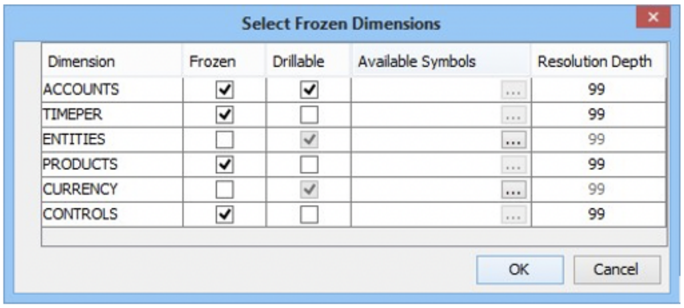
1. In the view, do one of the following:
    - Choose File > Save.
    - To save an existing template using a different name, choose File > Save As. The Save dialog appears



2. Complete these fields:

Field	Description
Save in	Select the folder in which you want to save the template. The default is the reporting folder.
Files of type	Select Report Template (*.rtp).
File name	Type a name for the template.

3. Click Save. If you have not saved the template before, the Select Frozen Dimensions dialog appears.



4. For each dimension listed, complete these fields:

Field	Description
Frozen	Select this field to specify that the dimension is frozen or clear this field to allow Report Users to select the symbols for this dimension in the template.
Drillable	If Frozen is cleared for this dimension, this field is automatically selected and cannot be cleared. Select this field to allow Report Users to drill into the symbol hierarchies in this dimension in the template.
Available Symbols	This field is available only if Frozen is cleared for this dimension. This field is unavailable for Schedule dimensions. Click the symbol selector button (...) and use the Available Symbol Selection dialog to specify the symbols that are available to Report Users in the Symbol Selections dialog in the template. If you do not specify any symbols for this field, all symbols that Report Users have access to in the dimension are available. **Note:** The symbols specified for this field should include the symbols selected for the template in Specifying orientation and symbols in a template. If a symbol is selected in the template and is not specified as an available symbol, Report Users cannot reselect it if they remove it in the Symbol Selections dialog.
Resolution Depth	This field is available only if Frozen is selected for this dimension. Specify the number of levels to go down in the hierarchy until a symbol the Report User has access to is reached. This number is only applicable when a template is set to use a symbol above the Report User's access in the hierarchy. This number may be entered manually (valid values are from 0 to 99) or can be selected by clicking the cell and selecting the number from the drop-down list. The default value for this field is 99.

For more information on how these settings affect template behavior, see Editing dimension and symbol control.

5. Click OK. The template is saved locally on your hard drive.

Saving a report template - Report Users

As a Report User, you can access published report templates only in report view format. As such, when you save a report template, you must save it in either .pdf or .png format.

For more information, see Saving reports.

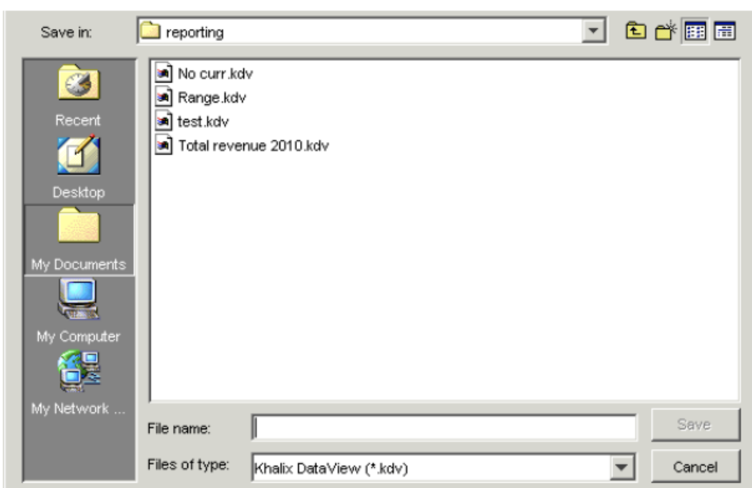
Saving a DataView

In Longview Analysis and Reporting, while you are working on a view, you may be able to save it in DataView format.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To save a view in DataView format, follow these steps.

1. In the view, do one of the following:
    - Choose File > Save.
    - To save an existing view using a different name, choose File > Save As. The Save dialog appears.



2. Complete these fields:

Field	Description
Save in	Select the folder in which you want to save the DataView. The default is the reporting folder.
Files of type	Select DataView (.kdv).
File name	Type a name for the DataView.

3. Click Save. The DataView is saved.

Saving a file in Excel format

You may be able to export the contents of a view to an Excel worksheet.

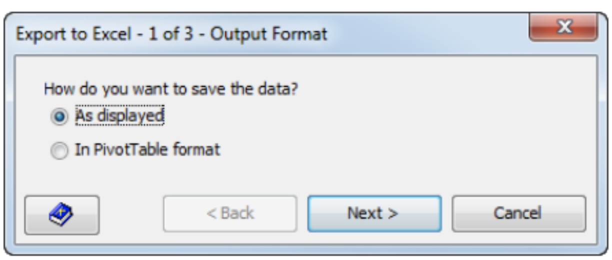
Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

With the view saved in Excel format, you can open it as a worksheet in Microsoft Excel.

To save a view as an Excel worksheet, follow these steps.

1. Hidden symbols, suppressed symbols, and the child symbols of collapsed symbols do not appear in an Excel worksheet. If you want them to appear in the Excel worksheet, make these symbols visible before exporting.

2. In the view window, choose Tools > Export to Excel. The Export to Excel - 1 of 3 - Output Format dialog appears.

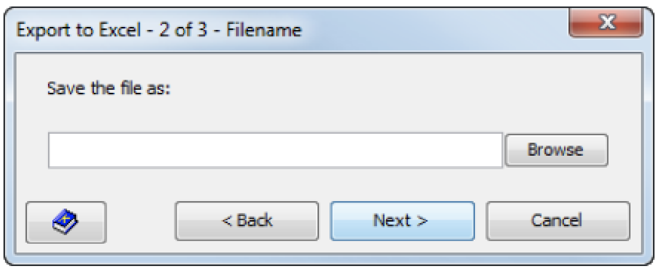


Note: If you are working with a report that contains more than 255 columns, the “As displayed” option is unavailable and the “In PivotTable format” option is selected by default.

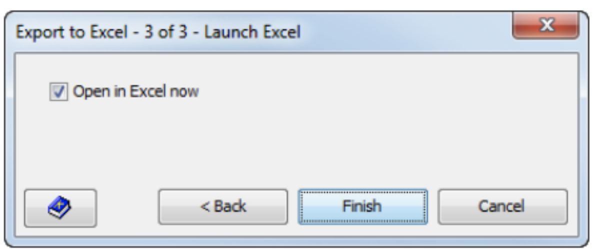
3. Select one of the following:

Field	Description
As displayed	To display data in the Excel worksheet exactly as it is in the view. If you select this option, you cannot change the orientation in the Excel worksheet, as you can in the original view.
In PivotTable format	To display data in PivotTable format. This format allows you to create PivotTable reports in Excel. For more information, see your Microsoft Excel documentation.

4. Click Next. The Export to Excel - 2 of 3 - Filename dialog appears.



5. For **Save the file as**, type the folder path and file name for the new Excel file, or click Browse to find an existing file to replace.
6. Click Next. The Export to Excel - 3 of 3 - Launch Excel dialog appears.



7. For **Open in Excel Now**, do one of the following:
   - To open the Excel worksheet you have just created, select this field.
   - To save the Excel worksheet without opening it right now, clear this field.
8. Click Finish. Depending on your selection in step 7, the view or the Excel worksheet appears.

Deleting templates and DataViews

The types of files you can delete in Longview Analysis and Reporting depend on your role.

Deleting a report template

Depending on your role, you may be able to delete report templates when they are no longer useful.

Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

Caution: If you follow this procedure, you cannot reverse your decision. Use with caution.

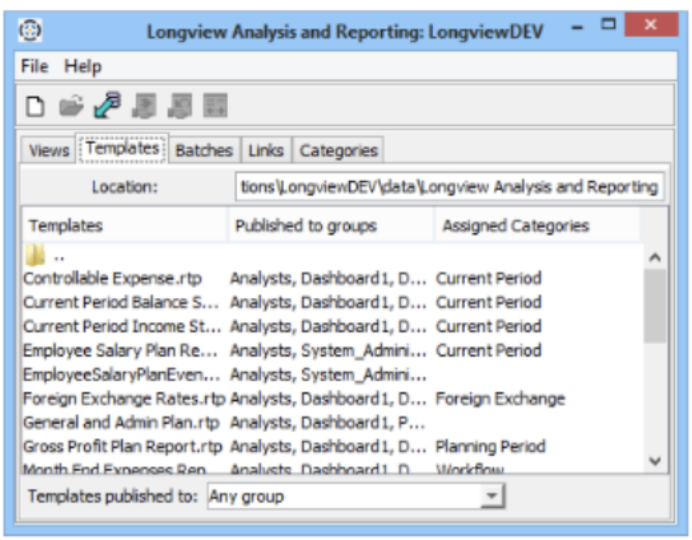
If you delete a published template without unpublishing first, you delete the copy on your local drive, but not the one on the application database. To completely delete a template, you must also unpublish it, before or after you delete the local copy.

The procedure you use depends on your starting point.

From the Longview Analysis and Reporting dialog

To delete a report template from the Longview Analysis and Reporting dialog, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Templates** tab. A list of existing report templates appears.



2. To see all your existing templates, select **Any Group** in the **Templates publish**ed to field.
3. Select the template you want to delete.
4. Press the Delete key. A confirmation dialog appears.
5. Click OK. The local copy of the template is deleted.

From Windows Explorer

If the Longview Analysis and Reporting dialog is not open, you can delete a report template in Windows Explorer as you would any other file.

Deleting a DataView Depending on your role, you may be able to delete DataViews when they are no longer useful.

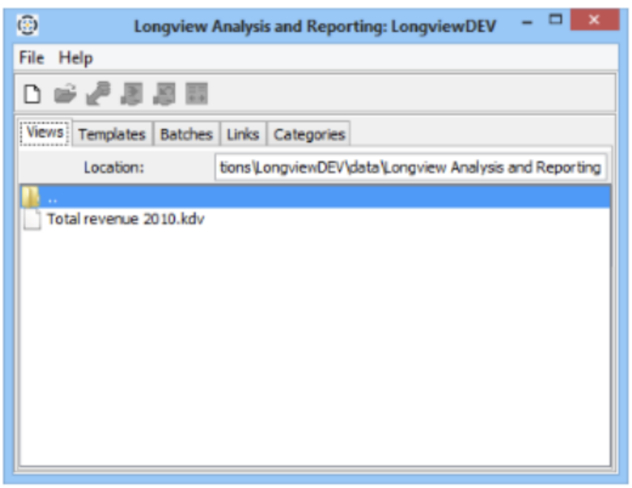
Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

The procedure you use depends on your starting point.

From the Longview Analysis and Reporting dialog

To delete a DataView from the Longview Analysis and Reporting dialog, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Views** tab. A list of all your locally saved DataViews appears.

   Files are listed numerically and alphabetically.

2. Select the DataView to delete.
3. Press the Delete key. A confirmation dialog appears.
4. Click OK. The DataView is deleted.

From Windows Explorer

If the Longview Analysis and Reporting dialog is not open, you can delete a DataView in Windows Explorer as you would any other file.

Working with Data Content

In the application, a Report Publisher prepares the templates that specify the content and format of the templates and reports that are accessed by other users.

In this section, you can find information on these main topics:

- Specifying default settings
- Specifying orientation and symbols in a template
- Changing symbol content in a template or view
- Expanding and collapsing hierarchies
- Working with conditions
- Adding calculated rows and columns
- Working with range calculations
- Editing symbol formats
- Hiding symbols
- Adjusting spacing with blank symbols
- Adding links to a template

Specifying Default Settings

When you create a new view, certain default settings and formats are used. Depending on your role, you may be able to change these settings and formats.

Specifying general settings

When a new view is created, certain default options are used for:

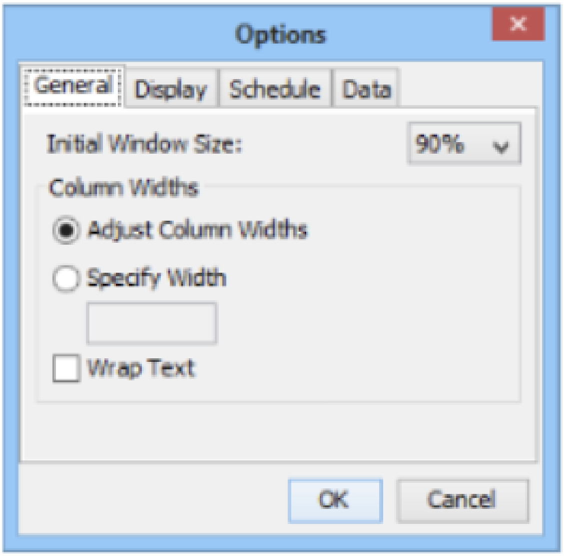
- the size of the view windows
- the type of symbol information and data to display

You may be able to change these options.

Role	Can perform this task?
Report Publisher	Yes, to create report views for data analysis and report templates for reporting purposes.
Report Author	Yes, to create report views for data analysis.
Report User	No.

To change default options, follow these steps.

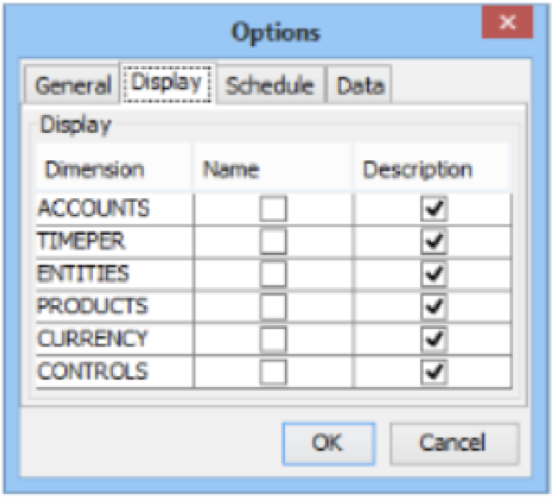
1. In the view window, choose Tools > Options. The Options dialog appears, with the General tab in view.



2. Complete these fields:

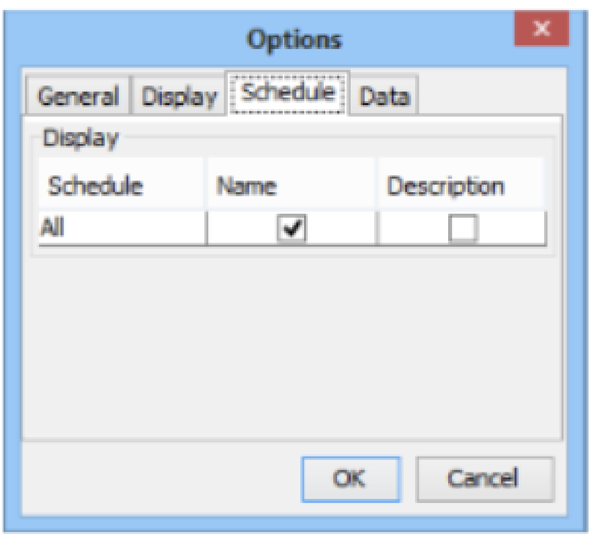
Field	Description
Initial Window Size	Select a window size, as a percentage of the screen size. This setting also applies to the initial size of the published reports and templates opened by Contributors.
Adjust Column Widths	You can choose to have column widths adjust automatically to the size of the largest number in each column. Do one of the following: ▪ To allow the column widths to adjust automatically, select this field. ▪ Otherwise, leave this field empty.
Specify Width - enter value below	Enter a percent (whole numbers only) of the window width for the width of columns.
Wrap Text	If you want text to wrap to the width of columns, select this option.

3. Click the **Display** tab.



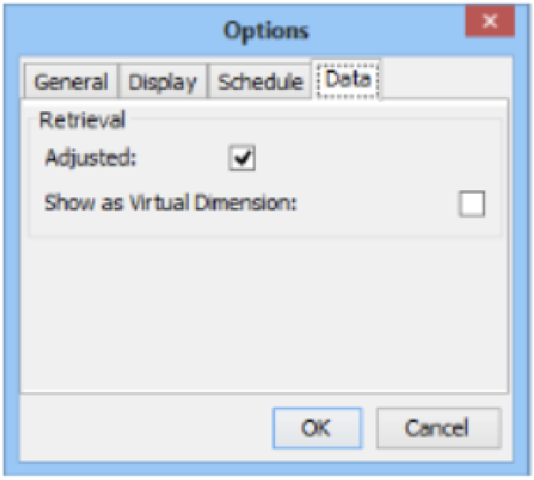
4. For each dimension in the Longview database, select the type of symbol information to view. You can choose to see symbol names, symbol descriptions, or both.

5. Click the **Schedule** tab.



6. Select whether you want the name or description of the ***schedule***, or both, displayed when viewing schedule information in your views. For more information, see Including schedule data.

7. Click the **Data** tab.



8. Complete these fields:

Field	Description
Adjusted	Do one of the following: ▪ To allow users to view data adjusted by journal entries (JEs), select this field. (This is the most commonly used option.) ▪ To allow users to view unadjusted data, leave this field empty. For more information, see Including unadjusted, adjustment, and total adjusted data.
Show as Virtual Dimension	Select this field to compare unadjusted, adjustment, and total adjusted data in the template or report view. Before you can select this option, Adjusted must be selected. As well, you cannot have a schedule selected in the view. For more information, see Including unadjusted, adjustment, and total adjusted data.

9. Click OK. The view window appears.

Including schedule data

In the application, a **schedule** is the concept of one or more extra dimensions, associated with designated symbols that allow you to store additional information about particular cells in the Longview database.

Your Longview system may contain schedules for many purposes; for example, to provide extra detail about intercompany transactions, taxes, inventory, property, plant, and equipment information, and meals and entertainment expenses.

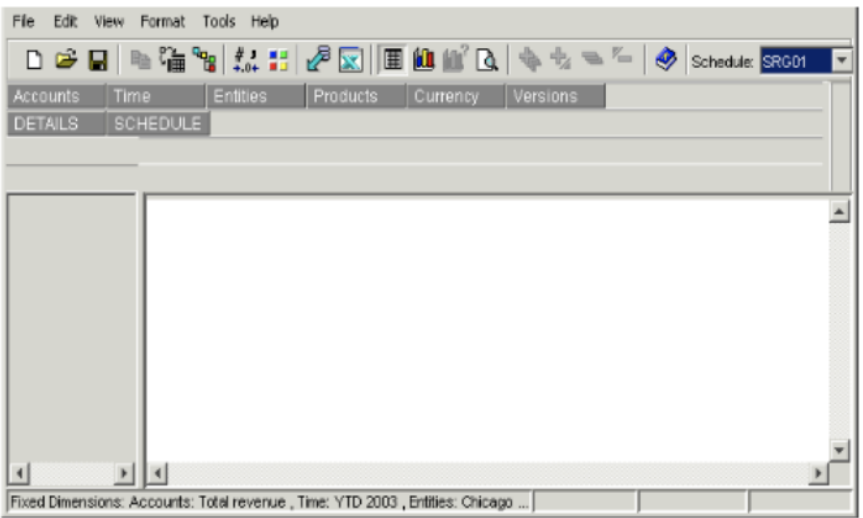
Your Longview system already contains the schedule definitions that allow you to include, view, and enter schedule data. You can include, and view schedule data in your templates, and DataViews. Each view can include only one schedule at a time. Base and schedule data cannot coexist in the same report view or template, unless you follow the steps outlined in this section.

Depending on your role, you may be able to include schedule data in templates and report views.

Role	Can perform this task?
Report Publisher	Yes, to create report views for data analysis and report templates for reporting purposes.
Report Author	Yes, to create report views for data analysis.
Report User	No. Users have access only to the schedules defined by the Publisher for the template.

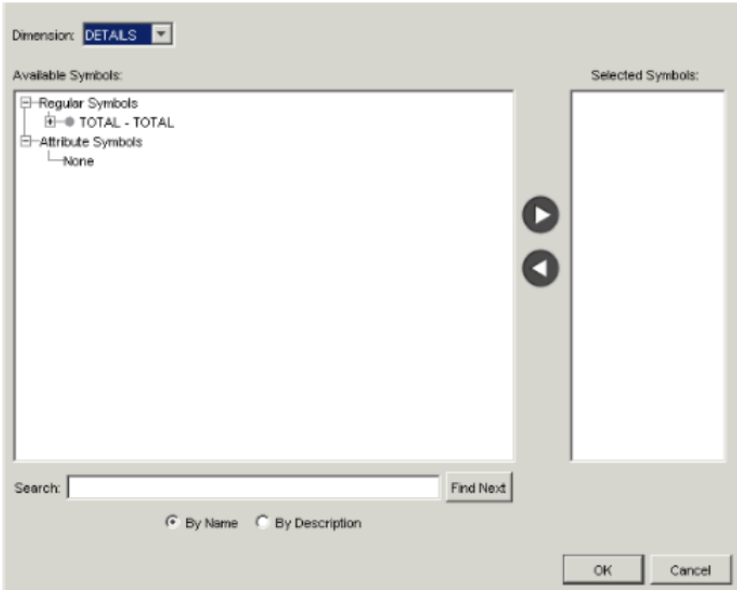
To include schedule data in your report view or template, follow these steps.

1. In the view, for Schedule, select the schedule you want to include. Dimension buttons for each schedule dimension as well as a button labelled **Schedule** appear, in a separate dimension bar.



> **Note:** If dimension orientation and symbol selection were defined before selecting a schedule, that orientation is lost when each dimension is moved to the fixed dimension position. Fixed dimensions can only contain one symbol. If there were down or across dimensions containing more than one symbol, you are prompted to redefine your symbol selections so that each dimension contains only one symbol.

2. Click a schedule dimension button (not the button labeled Schedule). The Symbol Selection dialog appears, displaying the symbols in that schedule dimension.



3. Select the schedule symbols you want to appear in the view and move them to the Selected Symbols field.

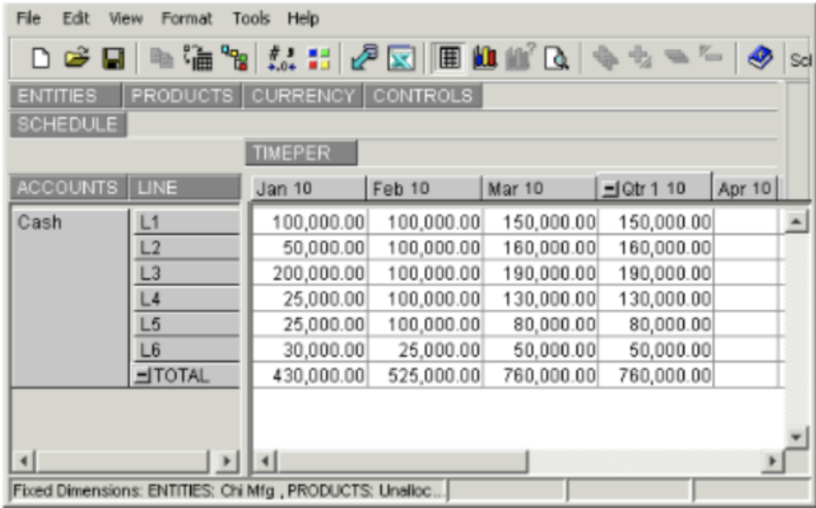
4. Click OK. The view appears.

5. Repeat step 2 to step 4 for each schedule dimension in the view.

> **Caution:** If you select symbols for line-item detail comments or line-item detail values, make sure you select the related time period. Selecting the wrong time period symbol could result in mismatched data.

6. When you are finished selecting symbols, click OK. The view appears.

7. Define the orientation of the dimensions as desired. When you are finished the view may look like this:



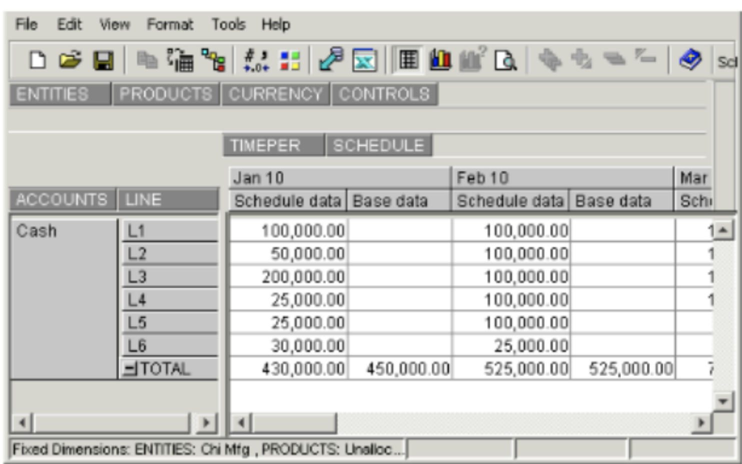
> **Note:** If you report on the CDate symbol for the VComments schedule, the comment date is displayed in international format for the time zone of the application server.

8. You can proceed to Comparing base and schedule data.

Comparing base and schedule data

You can compare **base** data and **schedule** data in your templates, and DataViews.

For example, the following illustration shows a simple comparison between base and schedule data for the Cash account.



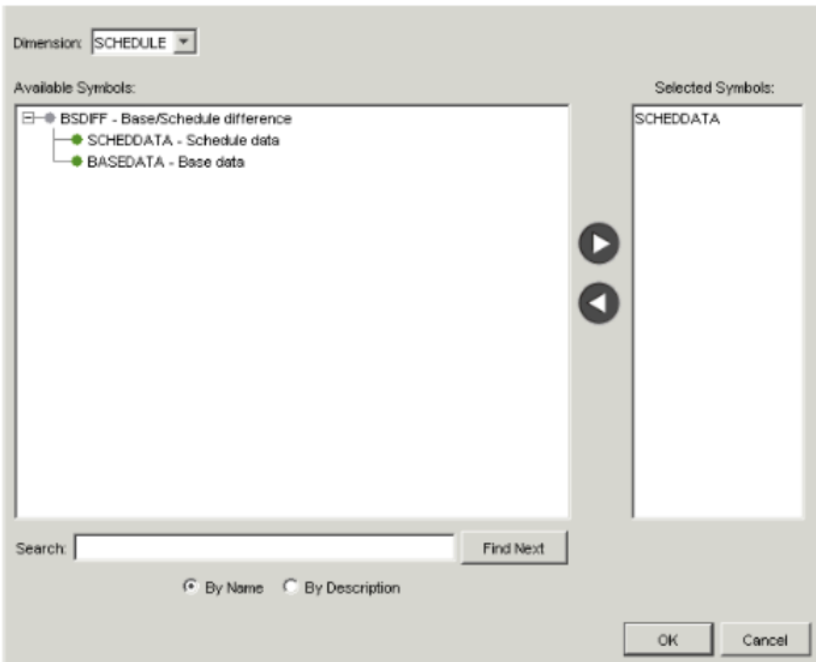
Depending on your role, you may be able to compare base and schedule data.

Role	Can perform this task?
Report Publisher	Yes, to create views for data analysis and report templates for reporting purposes.

Role	Can perform this task?
Report Author	Yes, to create views for data analysis.
Report User	No.

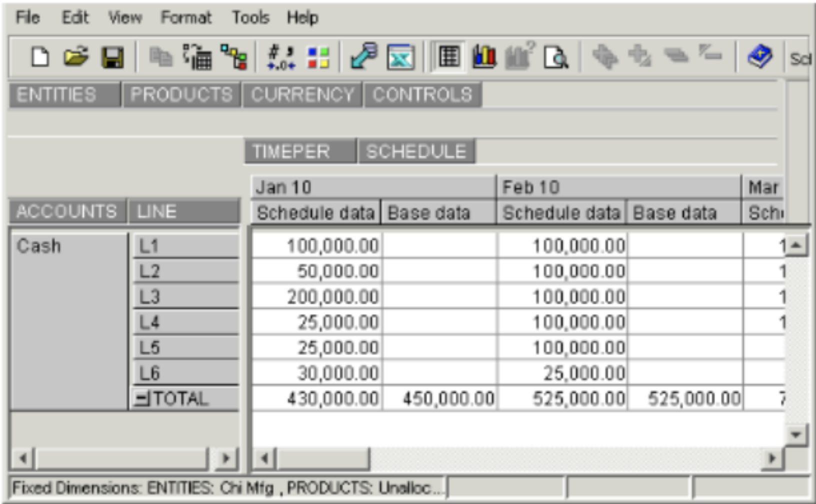
To compare base and schedule data, follow these steps.

1. Define the view as described in Including schedule data.
2. Drag and drop the Schedule button to the down or across directions of the view.
3. Click the Schedule button. The Symbol Selection dialog appears.



4. Move the BASEDATA symbol to the **Selected Symbols** field. By default, SCHEDDATA data is already selected.

5. Click OK. The view appears showing both base and schedule data.



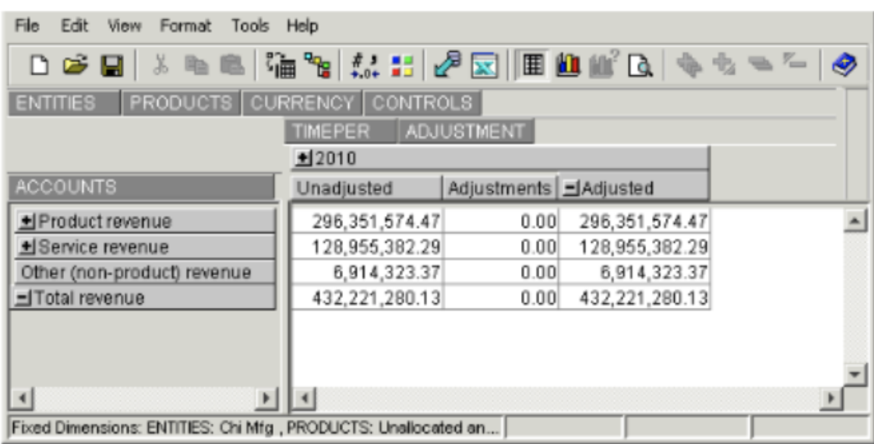
When working with templates or views containing both base and schedule data, base data is always read-only and can be used for comparison purposes only.

Including unadjusted, adjustment, and total adjusted data

You can choose to view three variations of your data: Unadjusted, Adjustment, and Total Adjusted data.

In the Data tab of the Options dialog, as described in step 8, the Show as Virtual Dimension field is available only when the Adjusted field is selected.

When the Show as Virtual Dimension field is selected, a virtual dimension called Adjustment appears in the dimension bar. The Adjustment dimension contains three symbols: Unadjusted (child), Adjustments (child), and Adjusted (parent of Unadjusted and Adjustments).



The virtual Adjustment dimension behaves like a light version of a regular dimension. You can do most things that you can with regular dimensions, with the following exceptions:

- You cannot add, edit, or delete calculated symbols.
- You cannot add, edit, or delete blank symbols.
- You cannot hide symbols.
- Frozen and drillable options do not apply to the Adjustment dimension. This dimension is drillable and non-frozen at all times to all users.

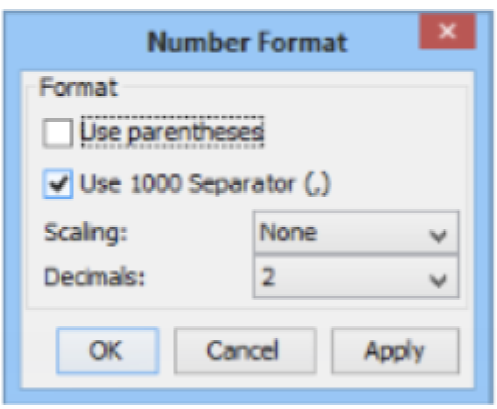
Specifying number formats

When a new view is created, certain default settings for number formats are used. You may be able to change these settings.

Role	Can perform this task?
Report Publisher	Yes, to create report views for data analysis and report templates for reporting purposes.
Report Author	Yes, to create report views for data analysis.

To change number formats, follow these steps.

1. In the view window, choose Format > Number. The Number Format dialog appears.



Note: If you are working in Longview Analysis and Reporting, the Rules section does not appear in this dialog.

2. Complete these fields:

Field	Description
Use parentheses	Do one of the following: ▪ To display negative numbers enclosed in parentheses, select this field. ▪ To display negative numbers with a minus sign, leave this field empty.
Use 1000 Separator	Do one of the following: ▪ To display commas as thousands separators, select this field. ▪ To display numbers without thousands separators, leave this field empty.
Scaling	Select a scaling factor for all numbers in the template. Scaling refers to the format in which the data appears. For example, if you are dealing with very large numbers, you may want to view numbers in thousands or millions. Scaling makes the numbers easier to read. For example, to view the number “10,000” as “10”, select 000s to specify that all numbers appear in thousands. You can set the scaling of individual symbols and cells as well. For more information, see Editing symbol formats and Editing cell formats.
Decimals	Select the number of decimal places for all symbols in the template. The results of allocation calculations are rounded up to the precision you select here. You can set the decimal settings of individual symbols and cells as well. For more information, see Editing symbol formats and Editing cell formats.

3. Click Apply to see the changes before exiting this dialog.

4. When you are finished, click OK. The view window appears.

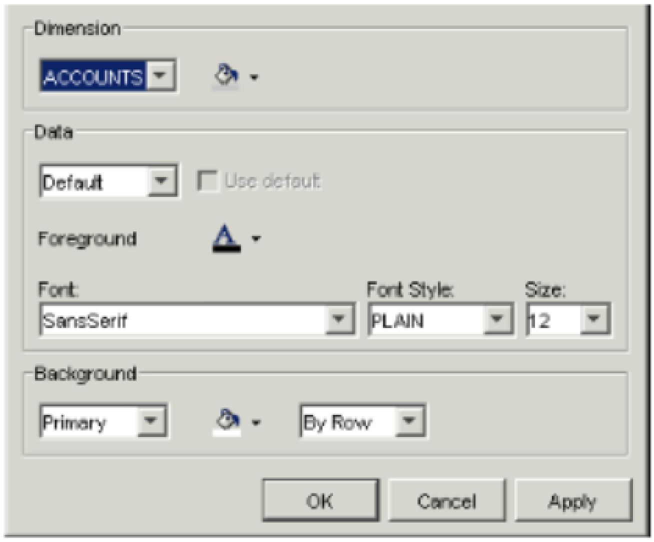
Specifying color and font formats

When a new view is created, certain default color and font settings are used. You may be able to change these settings.

Role	Can perform this task?
Report Publisher	Yes, to create DataViews for data analysis and report templates for reporting purposes.
Report Author	Yes, to create DataViews for data analysis.
Report User	No.

To change color and font settings, follow these steps.

1. In the view window, choose Format > Color. The Set Color Preferences dialog appears.



2. For Dimension, select a dimension that appears in either the down or across directions of the view, and then select a color in which to display the symbols in that dimension.

3. Repeat step 2 for each dimension in the down or across direction for which you want to define a color.

4. In the top left drop-down list in the Data section, select one of the following:

Data	Description
Default	To specify the default color and font formats for all data in Longview Analysis and Reporting.
Leaves	To specify the color and font formats for leaf rows only. If there is more than one down dimension, the color applies to the leaf symbols in the inner down dimension only.
Calculations	To specify the color and font formats for calculated data. The color applies to calculated symbols in the down and across directions.
Totals	To specify the color and font formats for totals data (rows only). If there is more than one down dimension, the color applies to the parent symbols in the inner down dimension only.

5. Do one of the following:

   - If you want to use the defaults, proceed to step 10.

   - If you do not want to use the defaults, clear the Use Default Font field. The other fields become active. Proceed to step 6.

6. Complete these fields. For each, select Use Default to return to the default setting.

Field	Description
Foreground	Select a color for your selection in step 4. This setting overrides the default setting.
Font	Select a font for your selection in step 4. This setting overrides the default setting.
Font Style	Select a font style for your selection in step 4. This setting overrides the default setting.
Size	Select a font size for your selection in step 4. This setting overrides the default setting.

7. Repeat step 4 and step 6 as required, for each type of data listed in step 4.

8. You can apply different colors to alternating rows, to distinguish between them. To do so, do the following:
   a. For Background, select **Primary**.
   b. In the drop-down list in the middle, select either **Row** or **Column**.
   c. In the drop-down list on the right, select the color to use for the primary rows or columns.
   d. For Background, select **Alternating**.
   e. In the drop-down list in the middle, select either **Row** or **Column**.
   f. In the drop-down list on the right, select the color to use for the alternating rows or columns.

9. Click Apply to see the changes before exiting this dialog.

10. When you are finished, click OK. The view window appears.

Adjusting column widths

When a new view is created, default settings for columns are used. You can make column widths adjust automatically to the size of the largest number in each column.

Role	Can perform this task?
Report Publisher	Yes, to create views for data analysis and report templates for reporting purposes.
Report Author	Yes, to create views for data analysis.
Report User	No.

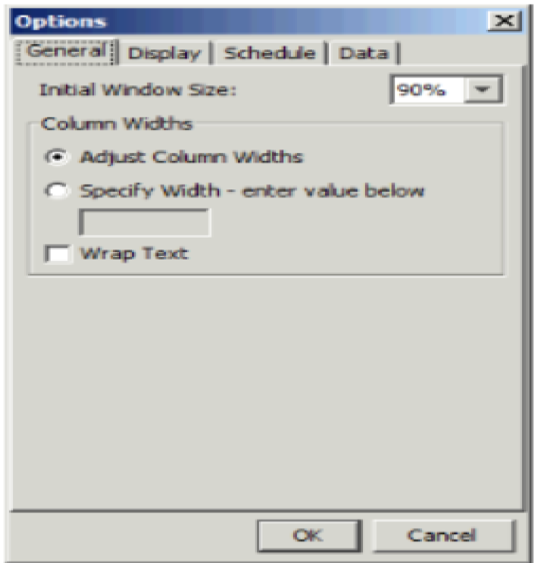
Manually

You can manually change column widths in two ways:

- Place the cursor just under the across symbol whose column width you want to adjust so that the double-sided arrow appears, and then drag the column to the desired width.

- Follow these steps:

  a. In the view window, choose Tools > Options. The Options dialog appears, with the General tab in view.



b. Make sure the Adjust Column Widths field is disabled. For more information, see Specifying general settings.

c. Click OK. The view appears.

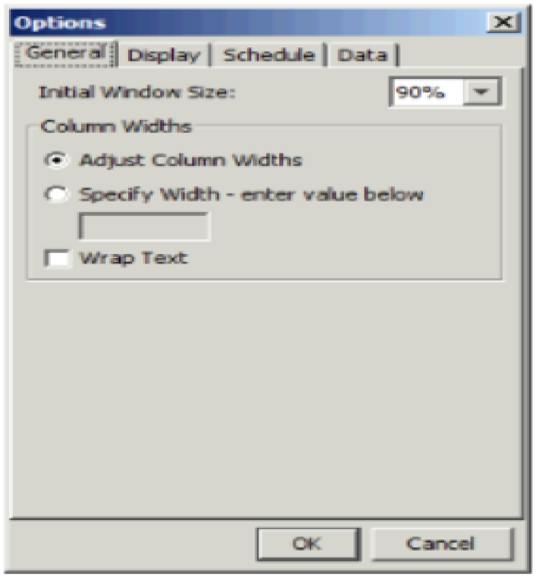
d. Choose Format > Column > Auto-size Columns. All columns in the template are adjusted to the size of the largest number in each column.

Note: When you manually adjust column widths, those settings are not saved when you save the template.

Automatically

To have column widths adjust automatically to the size of the largest number in each column every time you open a file, follow these steps.

1. In the view window, choose Tools > Options. The Options dialog appears, with the General tab in view.



2. Make sure the Adjust Column Widths field is selected. For more information, see Specifying general settings.
3. Click OK. The view appears.

Specifying Orientation and Symbols In A Template

When a new view is created, the Report Publisher must specify the orientation and symbols for each dimension in the database. The root symbol is the top hierarchy symbol that can be accessed in a particular situation.

You may be able to specify orientation and symbols.

Role	Can perform this task?
Report Publisher	Yes, to create DataViews for data analysis and report templates for reporting purposes.
Report Author	Yes, to create DataViews for data analysis.
Report User	No.

In many organizations, a report template contains the same symbols for every Report User, except for one or two dimensions, where each user works with his or her own area of responsibility, typically an entity. If this is the situation at your company, leave the symbol selection empty for that dimension, so that users must select their own entities when they first open the template.

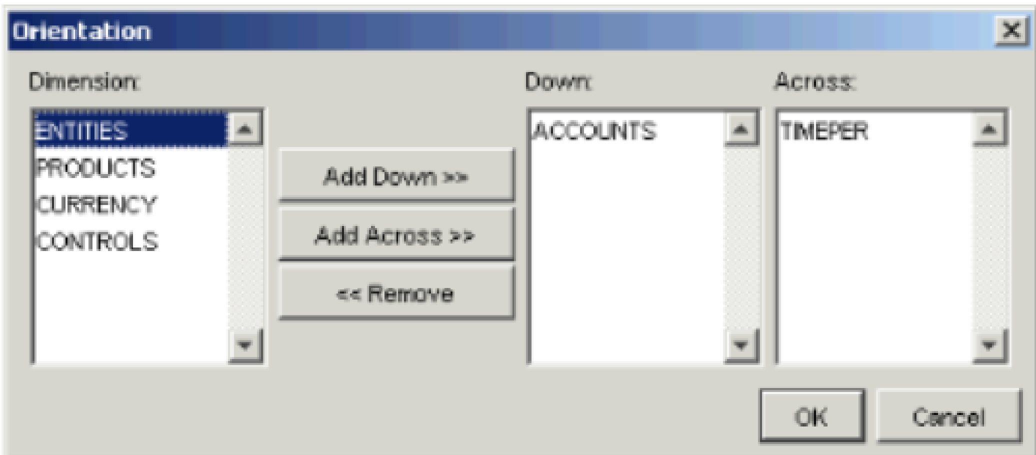
When you create a view for the first time, you should probably follow the procedure in Specifying orientation and symbols - Basic method.

Afterwards, you may prefer to use the procedure in Specifying orientation and symbols • Advanced method.

Specifying orientation and symbols - Basic method

To specify orientation and symbols, follow these steps.

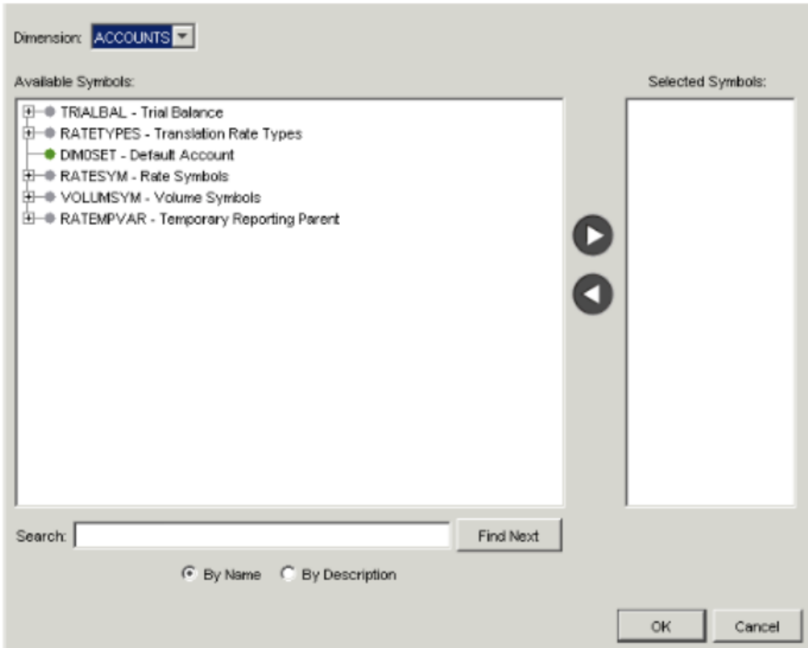
1. In the view window, choose Format > Orientation. The Orientation dialog appears.



2. For Dimension, select each dimension you want to appear in the down direction, and click Add Down. (You can select more than one by holding down the Ctrl key on your keyboard while making your selections.) The dimension names move to the Down field.

3. For Dimension, select each dimension you want to appear in the across direction, and click Add Across. (You can select more than one by holding down the Ctrl key on your keyboard while making your selections.) The dimension names move to the Across field.

4. Click OK. The Symbol Selection dialog appears.



In this dialog, you are prompted to select symbols for the down and across dimensions, in the order in which those dimensions are indexed in the database.

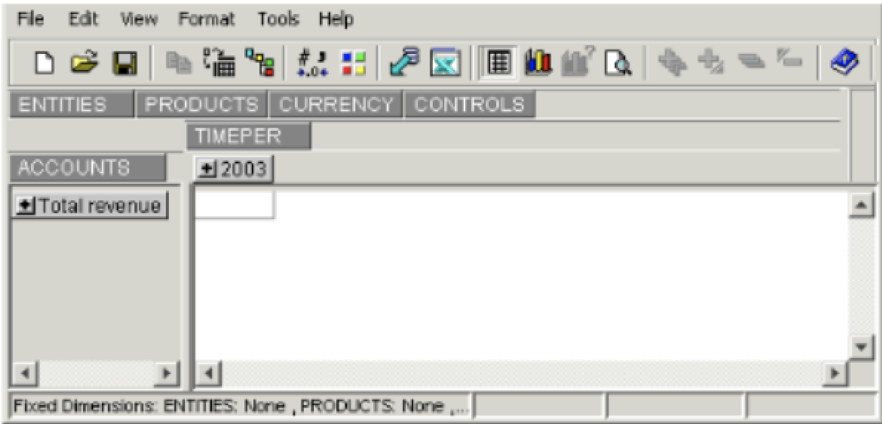
5. Complete the following:

Field	Description
Available Symbols and Selected Symbols	Find symbols in the Available Symbols list and click the arrow to move them to the Selected Symbols list. You may select as many symbols as necessary. If you want to prompt Report Users to select symbols for a particular dimension (for example, an entity) when they open the template, do not select a symbol for that dimension. You must remember however, to make sure users are allowed to select symbols for that dimension when you publish the template. You can change the order of the symbols in the Selected Symbols list. Simply click and hold, and then drag the symbol to its desired place. Depending on how your system is set up, Publishers may have the ability to select attributes instead of symbols. These attributes can be used to automate the selection of specified symbols in the templates that Report Users have access to. For more information, see Using attributes to automate symbol selection.

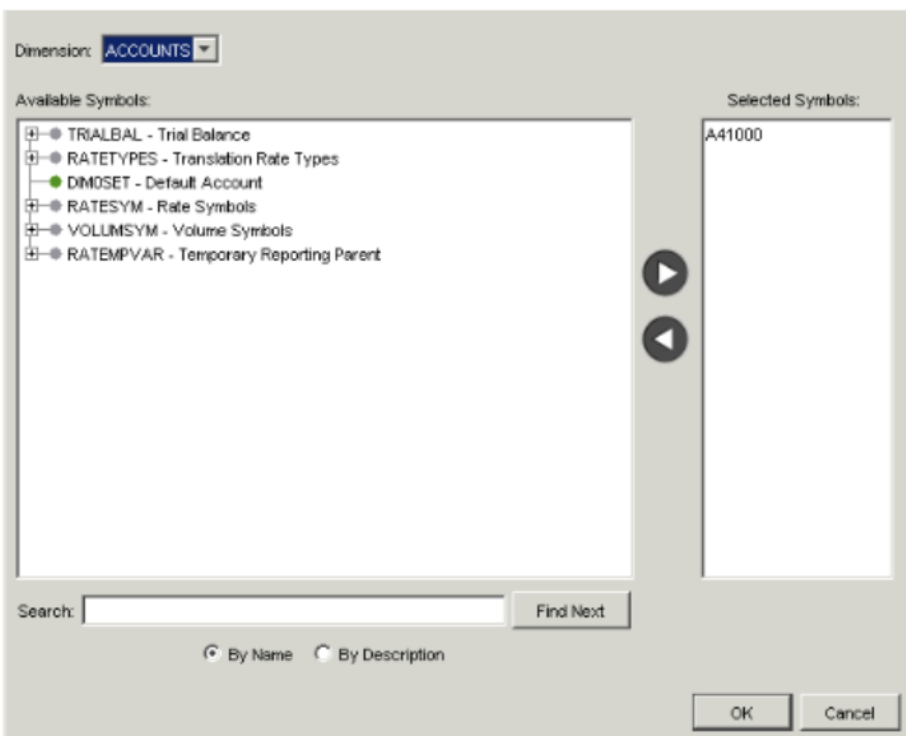
Note: To use the value of a floating time period, navigate through the time periods hierarchy in the Available Symbols list, and double-click a floating time period (indicated by an asterisk) to select it. For more information, see Using floating time period symbols.

6. Click OK. If there are more dimensions designated to the down or across directions, the Symbol Selection dialog reappears. Repeat step 4 and step 5, for each dimension you are prompted to select symbols for.

7. When you are done selecting symbols for the down and across dimensions, the view window appears.



8. At this point, you have selected symbols only for the dimensions in the down and across positions. Now you can do so for the fixed dimensions as well. Choose Edit > Symbol Selections. The Symbol Selection dialog appears.



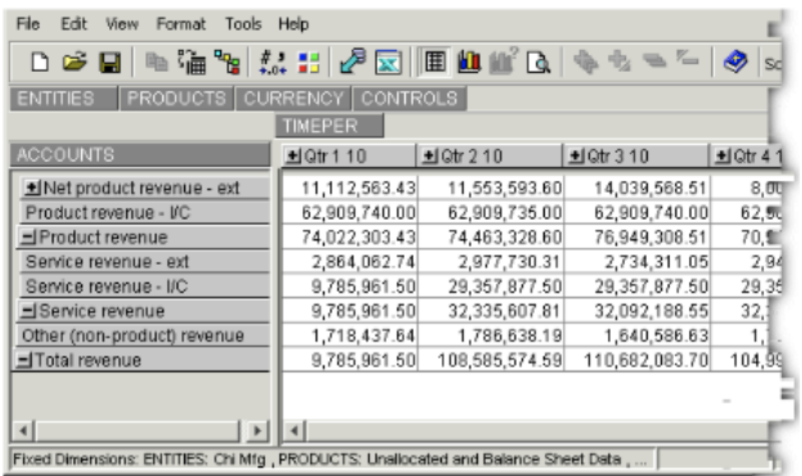
9. Select each of the other dimensions in turn and select one symbol for each.

   If you want to prompt Report Users to select symbols for a particular dimension (for example, an entity) when they open the template, do not select a symbol for that dimension. You must remember however, to make sure users are allowed to select symbols for that dimension when you publish the template.

   Depending on how your system is set up, Publishers may have the ability to select attributes instead of symbols. These attributes can be used to automate the selection of specified symbols in the templates that Report Users have access to. For more information, see Using attributes to automate symbol selection.

   Note: For fixed dimensions, you can select one symbol only. Typically, you would select an entity, a currency, and the Dim#Set symbols for the remaining dimensions.

10. When you are finished, click OK. The view window appears.

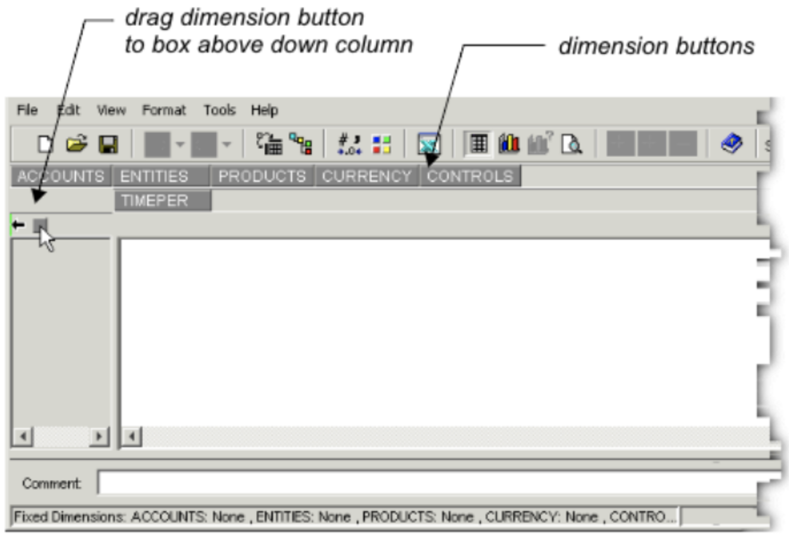


You can see the symbols for the fixed dimensions in the status bar at the bottom of the window.

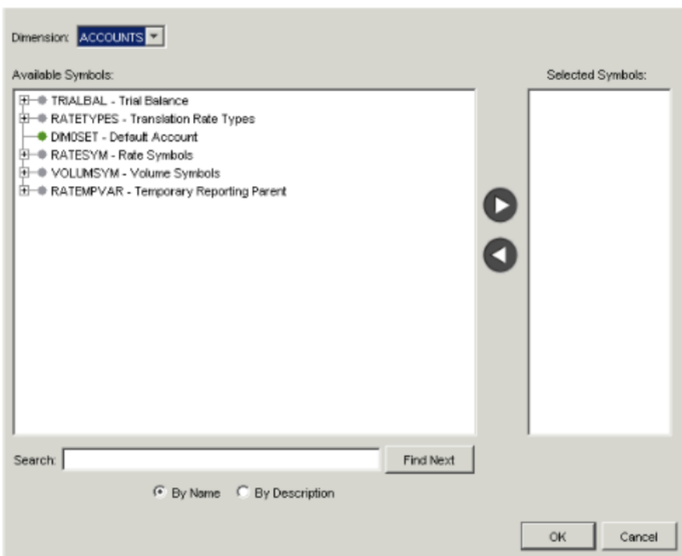
Specifying orientation and symbols - Advanced method

To specify orientation and symbols, follow these steps.

1. In the view window, click and drag a dimension button to the box just above the down column. (Typically, you would select your ACCOUNTS dimension.) A small black arrow appears to indicate the correct position.



2. As soon as you release your mouse button, the Symbol Selection dialog appears.



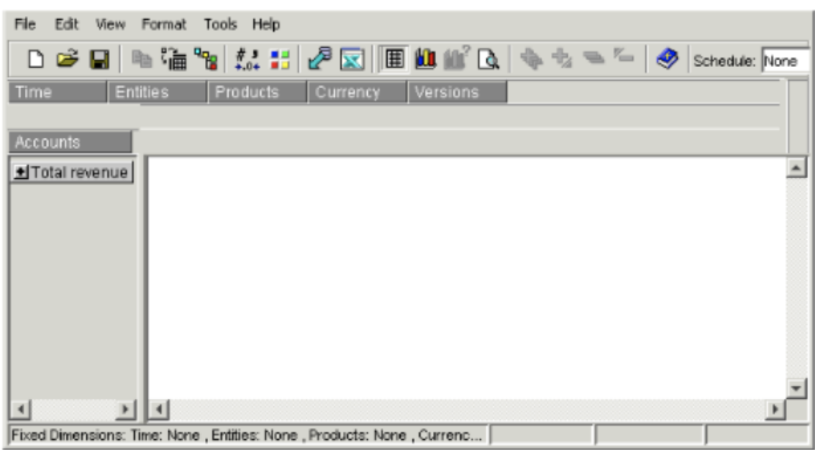
3. Complete the following:

Field	Description
Available Symbols and Selected Symbols	Find symbols in the Available Symbols list and click the arrow to move them to the Selected Symbols list. You may select as many symbols as necessary. If you want to prompt Report Users to select symbols for a particular dimension (for example, an entity) when they open the template, do not select a symbol for that dimension. You must remember however, to make sure users are allowed to select symbols for that dimension when you publish the template. You can change the order of the symbols in the Selected Symbols list. Simply click and hold, and then drag the symbol to its desired place. Depending on how your system is set up, Publishers may have the ability to select attributes instead of symbols. These attributes can be used to automate the selection of specified symbols in the templates that Report Users have access to. For more information, see Using attributes to automate symbol selection.

4. Click OK. Depending on the type of template, the dialog may reappear prompting you to select time period symbols. If so, repeat step 2 and click OK.

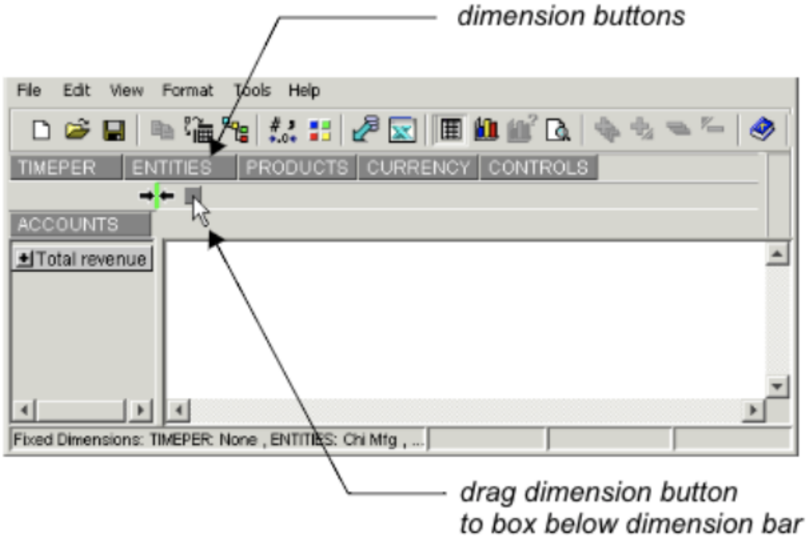
> **Note:** To use the value of a floating time period, navigate through the time periods hierarchy in the Available Symbols list, and double-click a floating time period (indicated by an asterisk) to select it. For more information, see Using floating time period symbols.

The view window appears.

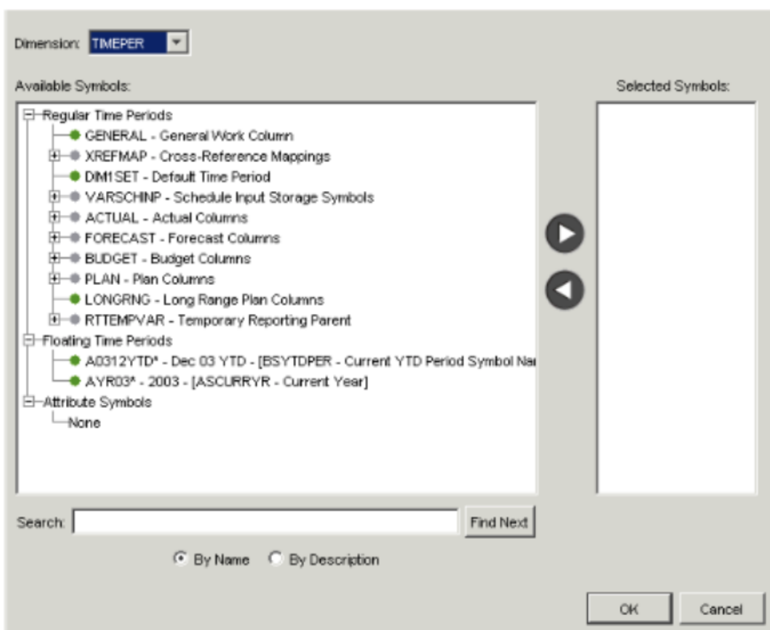


5. Repeat step 1 to step 4 for any other down dimension, if applicable.

6. In the view window, click and drag a dimension button to the box just below the dimension bar. (Typically, you would select your TIMEPER dimension.) A small black arrow appears to indicate the correct position.



7. As soon as you release your mouse button, the Symbol Selection dialog appears.

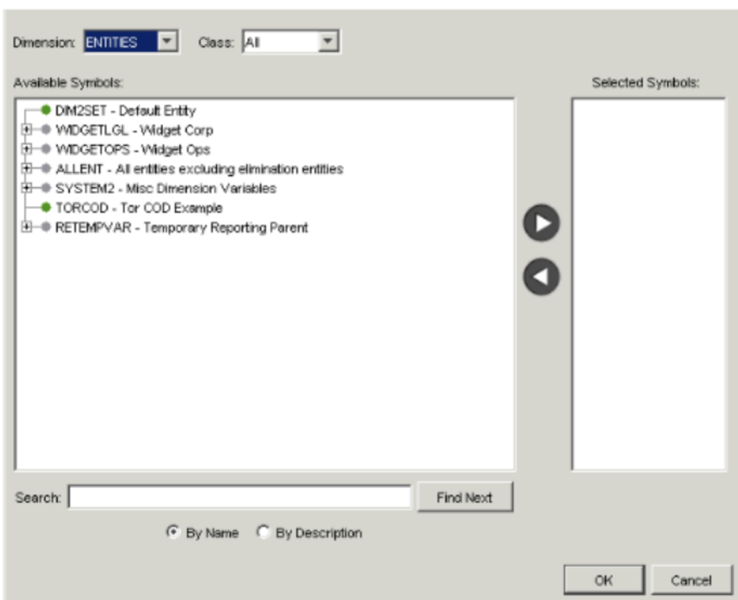


8. Complete the following:

Field	Description
Available Symbols and Selected Symbols	Find symbols in the Available Symbols list and click the arrow to move them to the Selected Symbols list. You may select as many symbols as necessary. If you want to prompt Report Users to select symbols for a particular dimension (for example, an entity) when they open the template, do not select a symbol for that dimension. You must remember however, to make sure users are allowed to select symbols for that dimension when you publish the template. You can change the order of the symbols in the Selected Symbols list. Simply click and hold, and then drag the symbol to its desired place. Depending on how your system is set up, Publishers may have the ability to select attributes instead of symbols. These attributes can be used to automate the selection of specified symbols in the templates that Report Users have access to. For more information, see Using attributes to automate symbol selection.

9. At this point, you have selected symbols only for the dimensions in the down and across positions. Now you can do so for the fixed dimensions as well.

10. Click on a dimension button in the fixed dimension bar. The Symbol Selection dialog appears, with the dimension you selected displayed in the Dimension field.



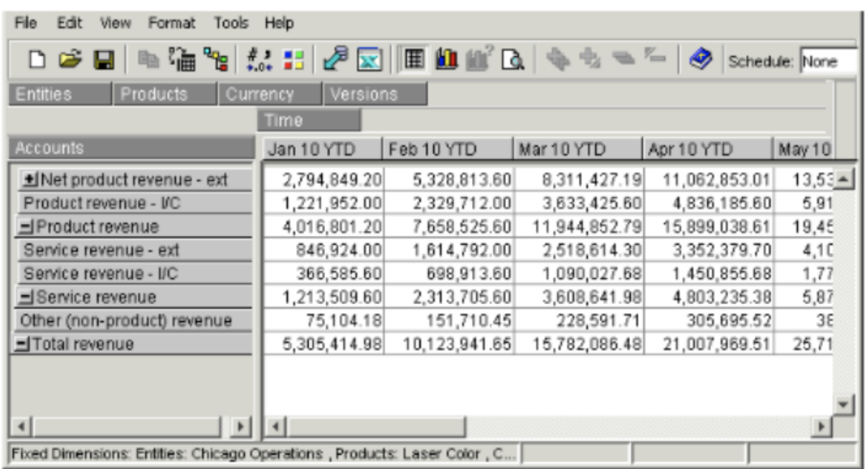
11. Complete the following:

Field	Description
Available Symbols and Selected Symbols	Find symbols in the Available Symbols list and click the arrow to move them to the Selected Symbols list. You may select as many symbols as necessary. If you want to prompt Report Users to select symbols for a particular dimension (for example, an entity) when they open the template, do not select a symbol for that dimension. You must remember however, to make sure users are allowed to select symbols for that dimension when you publish the template. You can change the order of the symbols in the Selected Symbols list. Simply click and hold, and then drag the symbol to its desired place. Depending on how your system is set up, Publishers may have the ability to select attributes instead of symbols. These attributes can be used to automate the selection of specified symbols in the templates that Report Users have access to. For more information, see Using attributes to automate symbol selection.

Note: For fixed dimensions, you can select one symbol only. Typically, you would select an entity, a currency, and the Dim#Set symbols for the remaining dimensions.

12. Click OK. The view window appears.

13. Repeat step 10 to step 12 for each remaining fixed dimension. When you are finished, the view window may look like this.



You can see the symbols for the fixed dimensions in the status bar at the bottom of the view window.

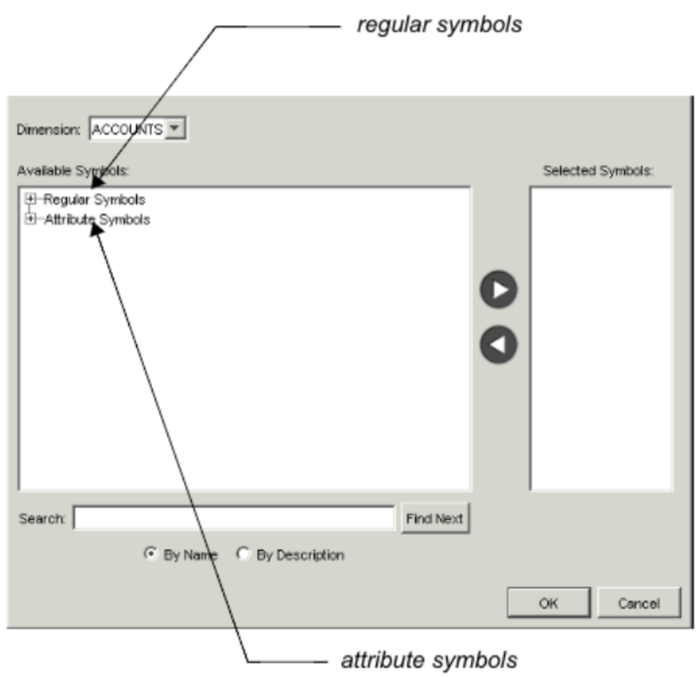
Using attributes to automate symbol selection

Depending on how your system is set up, Publishers may have the ability to select attributes instead of base and schedule symbols when defining the symbol content of templates. These attributes can be used to automate the selection of specified symbols in the templates that Report Users have access to. This is useful in minimizing potential mistakes made by users. As well, the number of templates that must be created for the various types of users can be reduced.

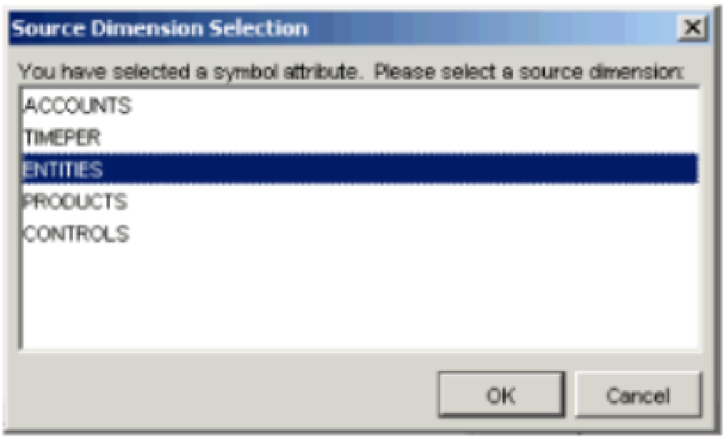
The following scenarios illustrate typical usage. For more information, see your System Administrator or your Professional Services representative.

Usage	Example
To make symbol selections in the ACCOUNTS dimension automatic based on a user's user group or user ID.	Group 1 needs access to the Total revenue accounts, but Group 2 needs access to the Total cost of revenue accounts. Both groups can use the same template. Only the appropriate symbols appear for each group.
To make symbol selections in the ACCOUNTS dimension automatic based on a user's user group or user ID.	Group 1 needs access to the Total revenue accounts, but Group 2 needs access to the Total cost of revenue accounts. Both groups can use the same template. Only the appropriate symbols appear for each group.

In each case, the Publisher can select the appropriate attribute in the Symbol Selection dialog.



If the Publisher selects an attribute whose value is dependent on the symbol selection in another dimension, the Source Dimension Selection dialog appears.



In this dialog, the Publisher can select the defining dimension.

Publishers must work closely with the System Administrator to ensure that these attributes are properly defined.

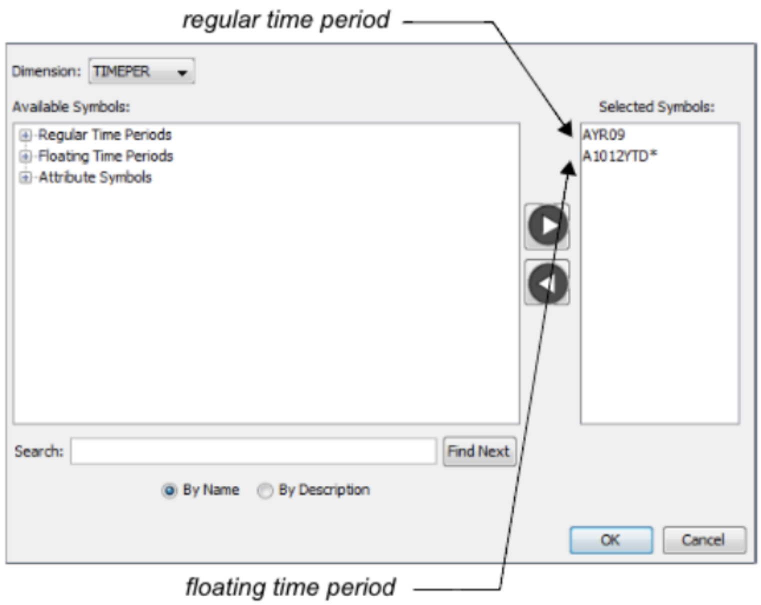
Using floating time period symbols

In the application, you can use floating time period symbols in templates and views.

If you have many standard reports that you want to reuse in the next calendar month or fiscal year, you can use floating time period symbols in these reports. Floating time periods are updated during a rollover. To ensure that you are using the correct year and month in your report templates, you can use floating time periods instead of regular time periods.

For example, let's say you have 100 reports containing 2009 time period symbols, and you want to use these same reports in the year 2010. If you used regular time period symbols, you would have to go into each of these reports and manually change the time period symbols from 2009 to 2010. However, if you use floating time periods, the symbols update automatically when the database is rolled over to the next year.

When you prepare a report, you select time period symbols in the Symbol Selection dialog. You have the option of selecting either regular time period symbols or floating time period symbols.

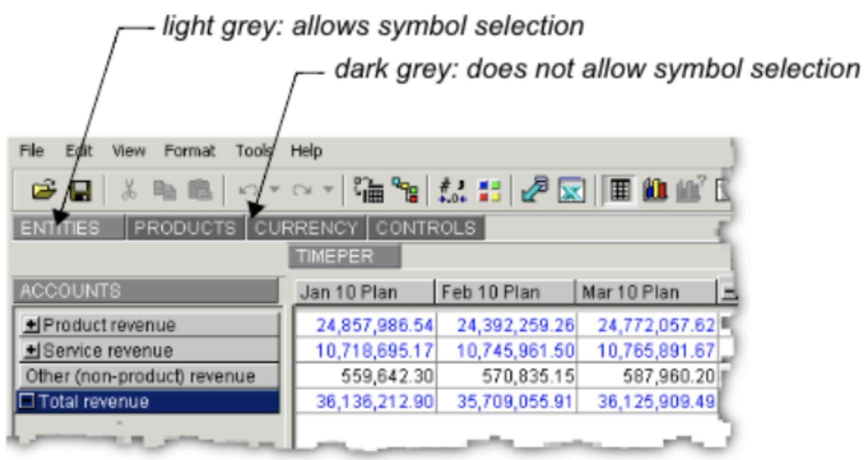


An asterisk appears with the symbol name to identify it as a floating time period symbol.

Changing Symbol Content In A Template Or View

You may from time to time, want to change the symbol selections in your templates, and DataViews.

If you are a Report Publisher, or Report Author, you can change the symbol selection for any dimensions in your templates and DataViews at any time.



Depending on your role, you may be able to perform this task.

Role	Can perform this task?
Report Publisher	Yes, to create DataViews for data analysis and report templates for reporting purposes.
Report Author	Yes, to create DataViews for data analysis.
Report User	No.

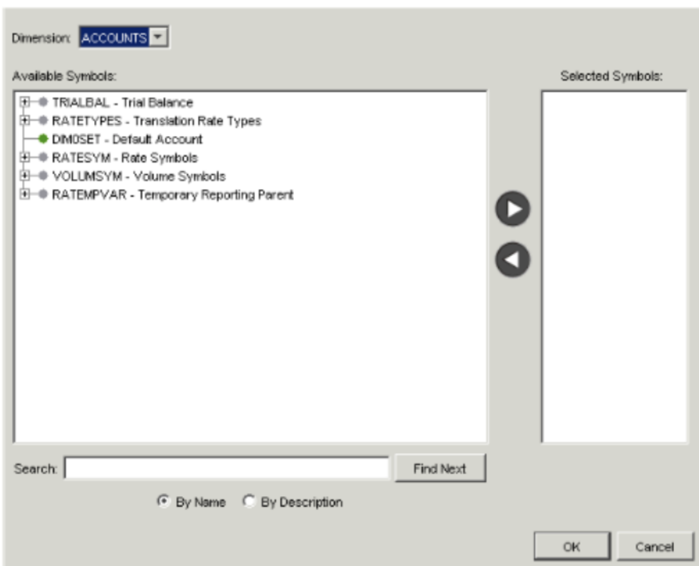
When you select symbols for the first time, you should follow the procedure in Changing symbol content - Basic method.

Afterwards, you may prefer to use the procedure in Changing symbol content - Advanced method.

Changing symbol content - Basic method

To change symbols for a dimension, follow these steps.

1. In the view window, choose Edit > Symbol Selections. The Symbol Selection dialog appears.



2. For Dimension, select the dimension containing the symbols to select.

3. Complete the following:

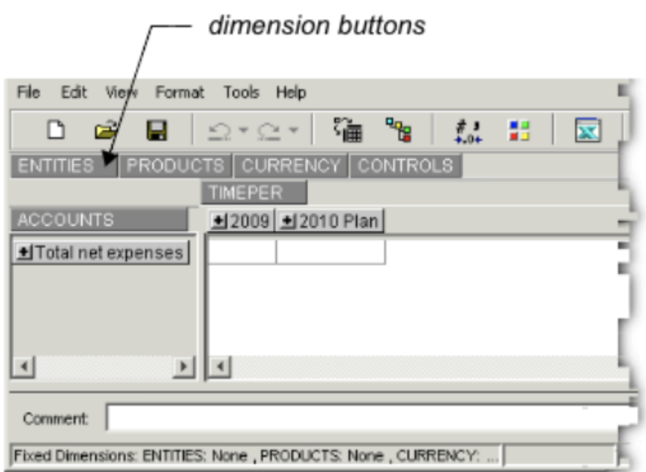
Field	Description
Available Symbols and Selected Symbols	Find symbols in the Available Symbols list and click the arrow to move them to the Selected Symbols list. If you want to prompt Report Users to select symbols for a particular dimension (for example, an entity) when they open the template, do not select a symbol for that dimension. You must remember however, to make sure users are allowed to select symbols for that dimension when you publish the template. For the down and across dimensions, you may select more than one symbol. For other dimensions, only one symbol is allowed. You can change the order of the symbols in the Selected Symbols list. Simply click and hold, and then drag the symbol to its desired place.

4. When you are finished, click OK. The view window appears.

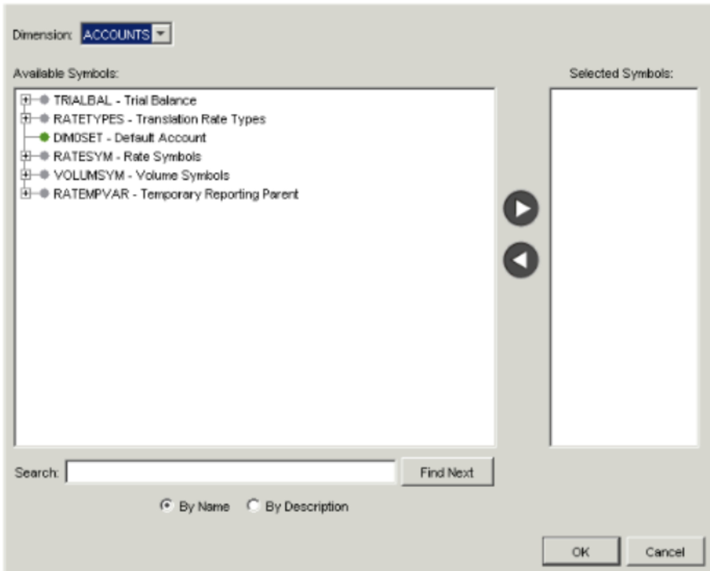
Changing symbol content - Advanced method

To change symbols for a dimension, follow these steps.

1. In the view window, click a dimension button, located just below the toolbar.



2. The Symbol Selection dialog appears, with the dimension you selected in the Dimension field.

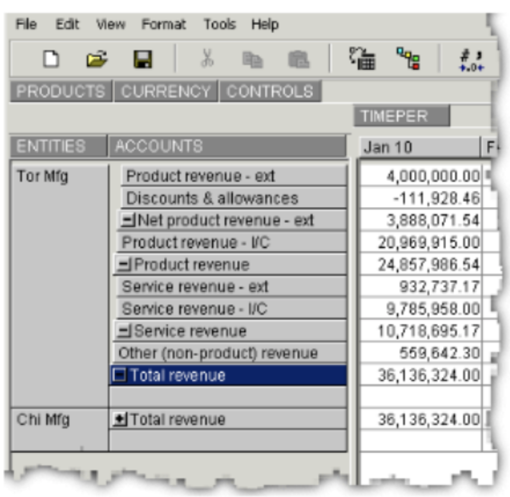


3. Complete the dialog, as described in step 2 to step 4 of Changing symbol content - Basic method.

Expanding And Collapsing Hierachies

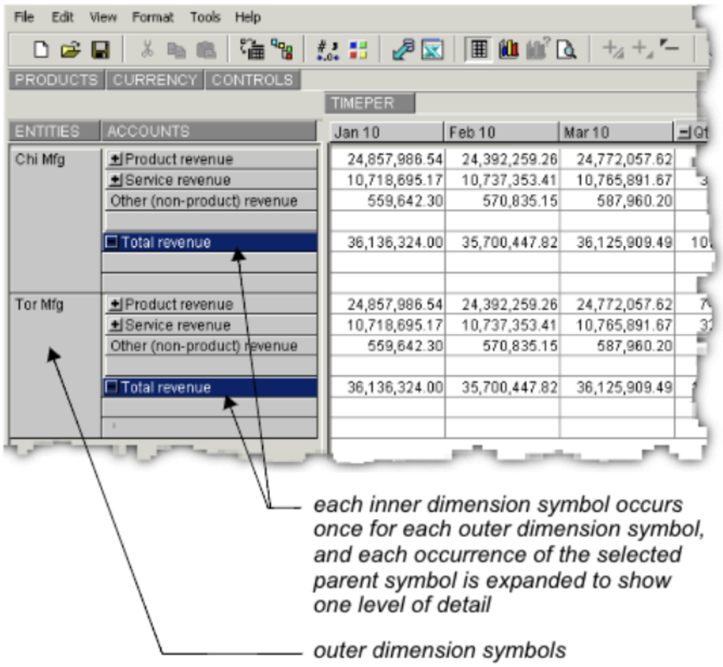
You can expand and collapse hierarchies in the down and across dimensions of a template, or DataView, by clicking the plus and minus signs beside parent symbols.

However, you can also choose a menu command to expand a selected parent symbol to show every level of symbol detail within it. For example:



You can also choose a menu command to display one level of detail within each occurrence of a selected parent symbol.

For example, if you have two outer dimension symbols, each inner dimension symbol occurs twice. You can expand each occurrence of the same parent symbol in the down or across dimensions to show one level of detail below the selected parent. For example:



Expanding hierarchies

To expand hierarchies in a template, or DataView, follow these steps.

1. Right-click a parent symbol. A pop-up menu appears.
2. Do one of the following:
   - Click the Expand All For Selected Symbol icon. The hierarchy expands to show all symbols within the selected parent symbol, but only for the selected occurrence of that parent symbol. Other occurrences of that parent symbol are not expanded.
   - Click the Expand One Level for All Occurrences icon. The hierarchy expands to only the first level of symbols under the selected parent symbol, for all the occurrences of that parent symbol.
   - In a template that includes an inner dimension, expand the inner dimension to display the symbols you want, and then right-click its corresponding symbol in the outer dimension and select Expand One - Match Inner Detail. This expands the outer dimension symbol one level down, and for each outer dimension child symbol, the inner dimension expands to match the inner dimension expansion of the parent symbol.
   - In a template that includes an inner dimension, expand the inner dimension to display the symbols you want, and then right-click in the outer dimension and select Expand All - Match Inner Detail. This expands all symbols visible in the outer dimension all levels down, and for each outer dimension child symbol, the inner dimension expands to match the inner dimension expansion of the parent symbol.

- Click Expand All For All to expand all the symbols in all the dimensions in a given direction.

> **Caution:** Depending on the number of symbols in your template, the Expand All For All function has the potential to retrieve huge amounts of data, which may adversely affect the performance of your system. Use this function with caution.

Collapsing hierarchies

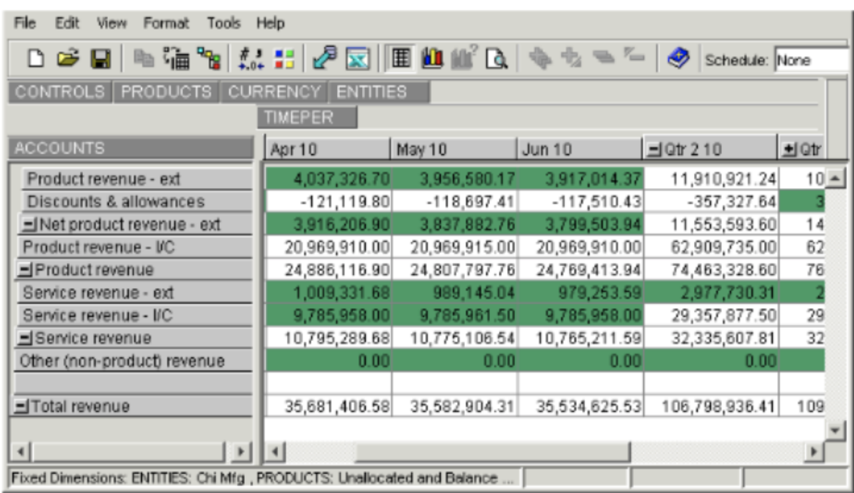
To collapse hierarchies in a template, or DataView, follow these steps.

1. Right-click a symbol. A pop-up menu appears.
2. Do one of the following:
   - To collapse all hierarchies in a dimension, right-click any symbol in that dimension, and click the Collapse All icon. All hierarchies in that dimension are collapsed.
   - To collapse the parent of a symbol, right-click the symbol whose parent you want to collapse and click the Collapse Parent icon. The parent is collapsed.

Working With Conditions

You may be able to apply conditions to data that meet certain criteria, so that the data stands out from the rest of the data.

For example, in the following illustration, you may want to highlight all numbers less than or equal to 10,000,000, for easier identification and analysis.



Creating a condition

You may be able to apply a condition to an entire view, or to one symbol at a time.

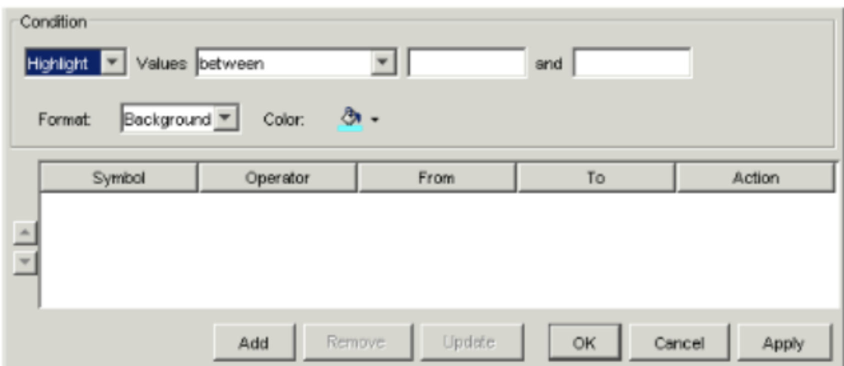
Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

For an entire view

You may be able to apply a condition to an entire view.

To apply a condition to an entire view, follow these steps.

1. Make sure that no row or column symbol is currently highlighted (selected).
2. Choose Format > Edit Conditional Displays. The Conditional Display dialog appears.



3. Complete these fields:

Field	Description
Top left drop-down list	Select one of the following: ▪ Highlight: To highlight the cells containing data meeting the condition. **Note:** To display highlighting for users in the report, you must show conditional display highlights. To do so, follow the steps in Formatting the report body. ▪ Filter: To blank out the cells containing data meeting the condition. ▪ Suppress: To hide the entire row or column containing data meeting the condition.
Values	Specify the condition you want to apply to the data. For example, you can choose to have values between 0 and 10,000,000 highlighted, filtered, or suppressed.

4. If you selected **Highlight** in step 3, you also need to specify background and foreground colors for the cells containing the data meeting the condition. For each of Background and Foreground, select

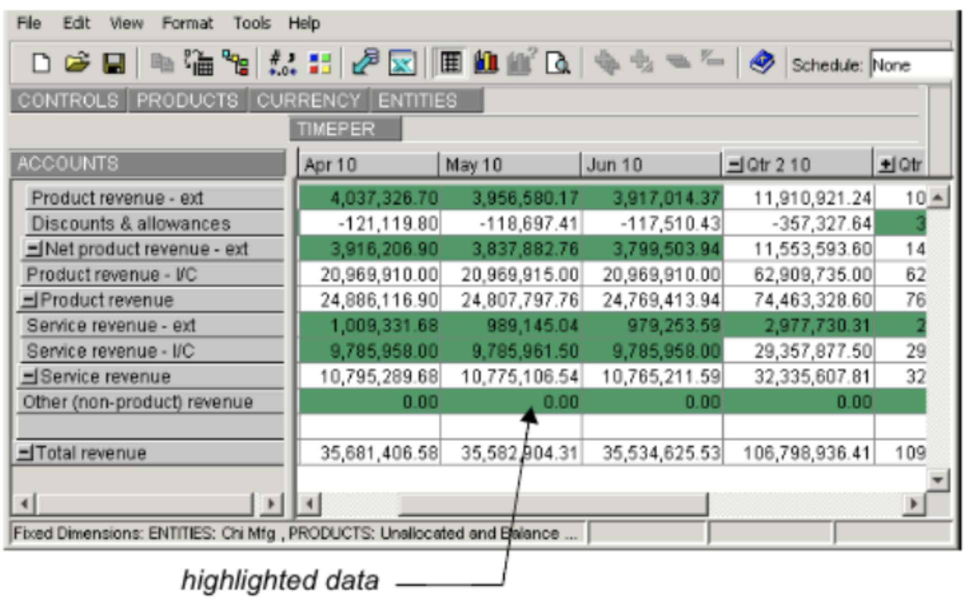
colors for the cells containing data meeting the condition. If you select a color only for **Background** or only for **Foreground**, the system automatically applies a default color to the other.

5. Click Add. The new condition is added to the list.
6. Repeat step 3 to step 5 for each condition you want to create.

> **Note:** Conditions are prioritized according to the order in which they appear in the list. For example, if the first condition shows numbers between 0 and 500 in red, and the second condition shows numbers between 0 and 1000 in blue, both red and blue conditions appear. However, if the first condition shows numbers between 0 and 1000 in blue, and the second condition shows numbers between 0 and 500 in red, only the blue condition appears, as it has priority over the second condition in the list. To change the priority, select a condition in the list, and then move it either up or down using the arrow keys to the left of the list.

7. Click Apply to see the changes before exiting this dialog.
8. When you are finished, click OK. The view appears, with the conditions you specified.

> **Note:** To display highlighting for users in the report, you must show conditional display highlights. To do so, follow the steps in Formatting the report body.

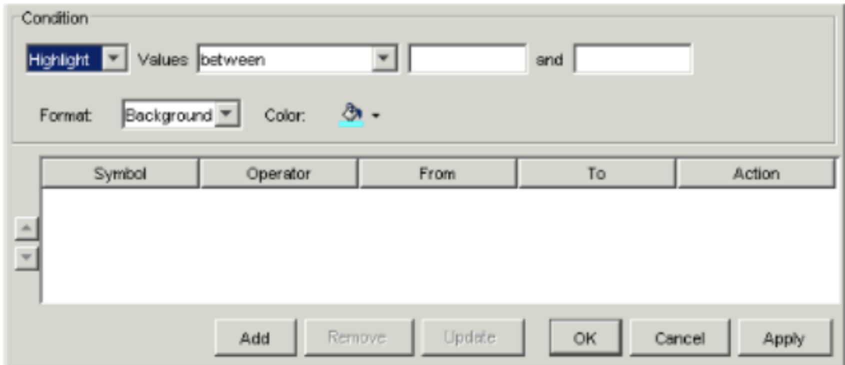


For one symbol only

You may be able to apply a condition to one symbol at a time. If you have more than one dimension in the down or across directions of the view, the symbol must be in the inner dimension.

To apply a condition to one symbol only, follow these steps.

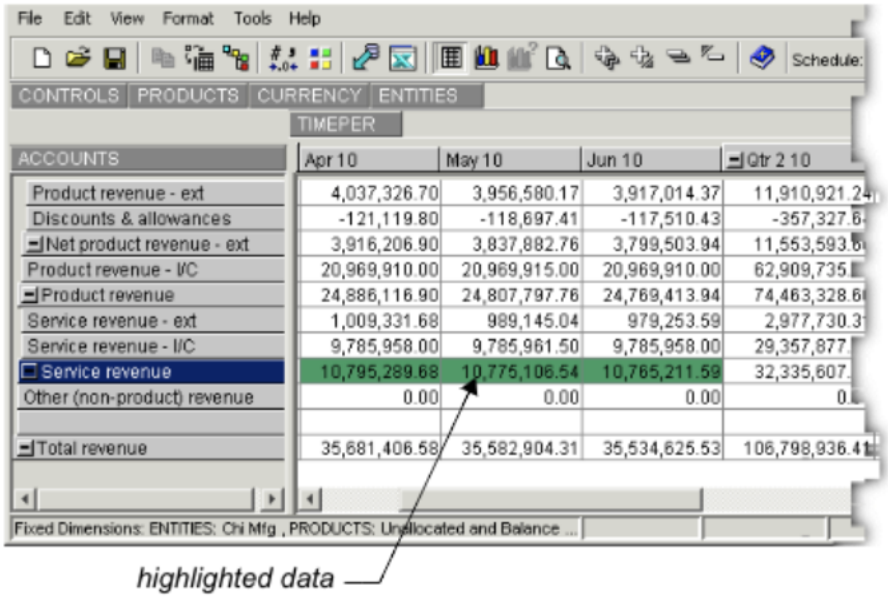
1. Click the symbol to which you want to apply a condition.
2. Choose Format > Edit Conditional Displays. The Conditional Display dialog appears.



3. Complete the dialog, as described in For an entire view.
4. Click Add. The new condition is added to the list.
5. Repeat for each condition you want to apply to the symbol.

> **Note:** Conditions are prioritized according to the order in which they appear in the list. For example, if the first condition shows numbers between 0 and 500 in red, and the second condition shows numbers between 0 and 1000 in blue, both red and blue conditions appear. However, if the first condition shows numbers between 0 and 1000 in blue, and the second condition shows numbers between 0 and 500 in red, only the blue condition appears, as it has priority over the second condition in the list. To change the priority, select a condition in the list, and then move it either up or down using the arrow keys to the left of the list.

6. Click Apply to see the changes before exiting this dialog.
7. When you are finished, click OK. The view window appears, with the conditions showing for the symbol.



8. If the conditions do not appear, make sure that conditions are activated. For more information, see Activating and deactivating all conditions.

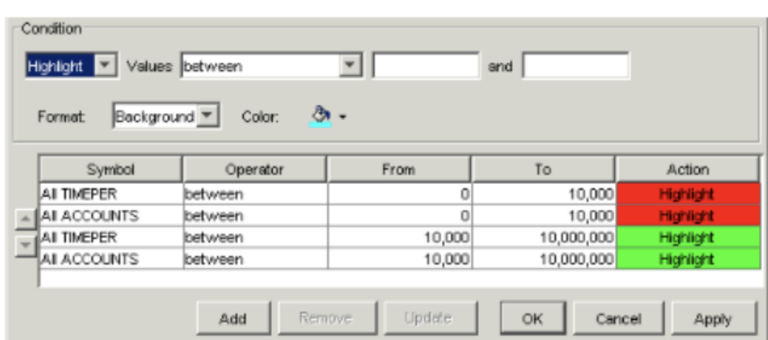
Editing a condition

Once you have created a condition, you may be able to make changes to its appearance and associated criteria.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To edit a condition, follow these steps.

1. Choose Format > Edit Conditional Displays. The Conditional Display dialog appears, listing the existing conditions.



2. From the list, select the condition to edit.
3. Complete the dialog, as described in For an entire view.
4. When you are satisfied with the changes, click Update. The changes are applied to the condition.

> **Note:** Conditions are prioritized according to the order in which they appear in the list. For example, if the first condition shows numbers between 0 and 500 in red, and the second condition shows numbers between 0 and 1000 in blue, both red and blue conditions appear. However, if the first condition shows numbers between 0 and 1000 in blue, and the second condition shows numbers between 0 and 500 in red, only the blue condition appears, as it has priority over the second condition in the list. To change the priority, select a condition in the list, and then move it either up or down using the arrow keys to the left of the list.

5. Click Apply to see the changes before exiting this dialog.
6. Click OK. The changes are saved.

Deleting a condition

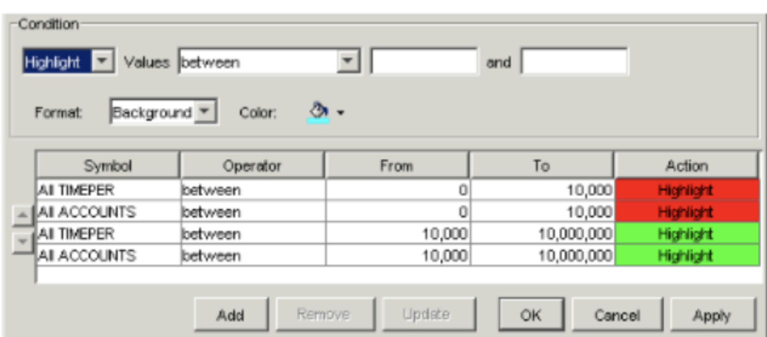
If you do not need a condition in a template, or DataView, you may be able to delete it.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

> **Caution:** If you follow this procedure, you cannot reverse your decision. Use with caution.

To delete a condition from a view, follow these steps.

1. Choose Format > Edit Conditional Displays. The Conditional Display dialog appears, listing the existing conditions.



2. In the list, select the condition, and click Remove. The condition is deleted from the list.
3. Click OK.

Activating and deactivating all conditions

You may be able to activate and deactivate all the conditions in a template, or DataView.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

The default setting is the activated state, represented by a check mark beside Apply Conditional Displays in the Format menu.

To change the activation of conditions, follow these steps.

1. Choose Format and look at the Apply Conditional Displays command:

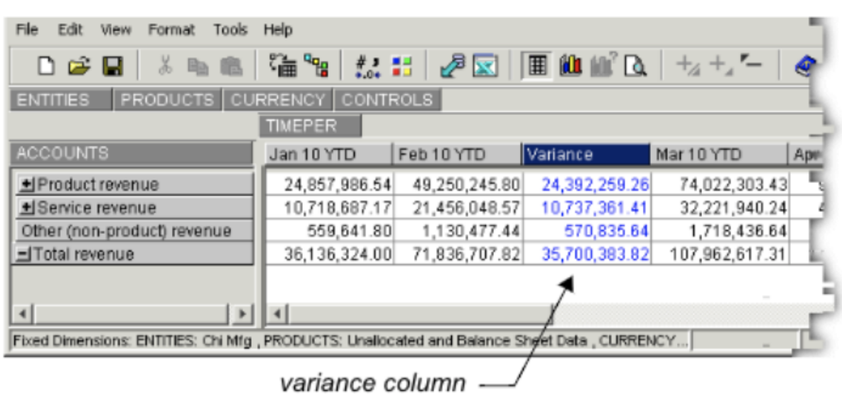
Command	Description
check	The conditional displays appear in the view.
no check	The conditional displays do not appear in the view.

2. To change the setting, choose Format > Apply Conditional Displays. If you enable the command, the conditions appear in the view.

Adding Calculated Rows And Columns

To compare data, you can create a calculated symbol. You can also use a calculated symbol to compare values from any row symbol or column symbol.

You can create a calculated row or column that compares two other rows or columns according to percentage, ratio, or variance. For example, the following illustration shows a calculated column that displays the variance between the first two time period symbols.



A calculated symbol is a symbol that exists in the template or view only. It does not exist in the Longview database, and its data is not submitted to the database.

Because multiple calculated symbols from various dimensions may intersect, a decision must be made to determine which of the calculations should apply at those intersections. You can determine the order of calculations of all calculated symbols in a template, or DataView, and can therefore control which formula applies at each calculation intersection.

You can perform calculations based on a complete slice of data, or you can limit calculations to specific ranges of cells within that slice of data. For example, you may need to create reports containing "per unit" calculations that vary between revenue and cost accounts.

Creating a ratio row or column

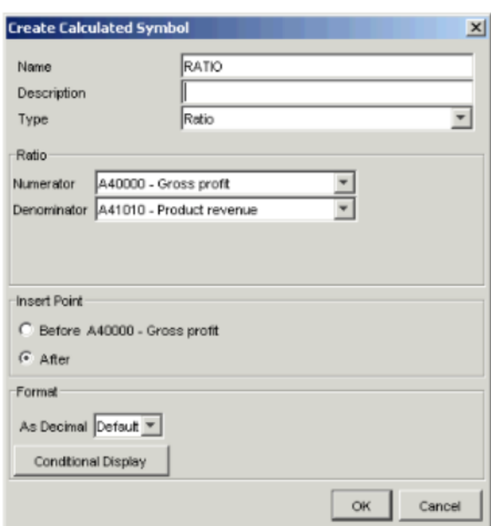
A ratio row or column is a type of ***calculated symbol*** that shows the ratio between two other rows or columns. When you place the cursor over this row or column, the calculation appears in a ScreenTip.

You may be able to create a calculated row or column that compares two other rows or columns according to the ratio between them.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To create a calculated ratio row or column, follow these steps.

1. Click on a symbol next to which you want to create a calculated symbol.
2. Right-click the symbol name. A pop-up menu appears.
3. Choose Insert Calculated Symbol. The Create Calculated Symbol dialog appears. The appearance of this dialog varies according to the orientation of the symbol you selected in step 1, and the type of calculation you select next in this procedure.



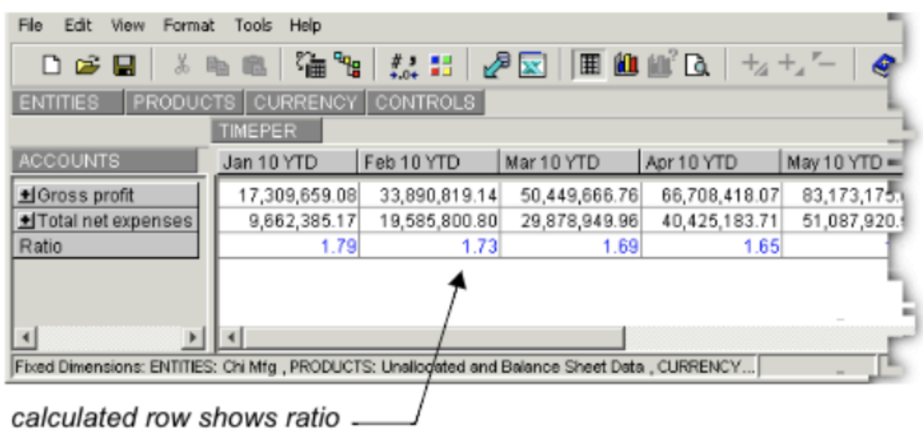
4. Complete these fields:

Field	Description
Name	Type a name for the calculated row or column.
Description	Type a description for the calculated row or column.
Type	Select Ratio. The available fields in the dialog change according to your selection.
Numerator	Select the symbol for the numerator in the ratio.
Denominator	Select the symbol for the denominator in the ratio.
Insert Point	Select a location for the comparison row or column. You can place it either before or after the symbol you selected in step 1.
Decimal	Select the number of decimal places to include in the calculated data. To retain the global decimal setting for the calculated symbol, select Default.

5. You may be able to create a condition for data in the calculated row or column, so that values meeting a certain condition are highlighted, filtered, or suppressed altogether.

   - To create a calculated row or column without a condition, proceed to step 6.
   - To create a condition, click Conditional Display, and complete the dialog, as described in Working with conditions.

6. Click OK. The view appears, showing the calculated row or column.



If you hold the cursor over a cell in the calculated row or column, a ScreenTip appears, showing the formula.

Creating a variance row or column

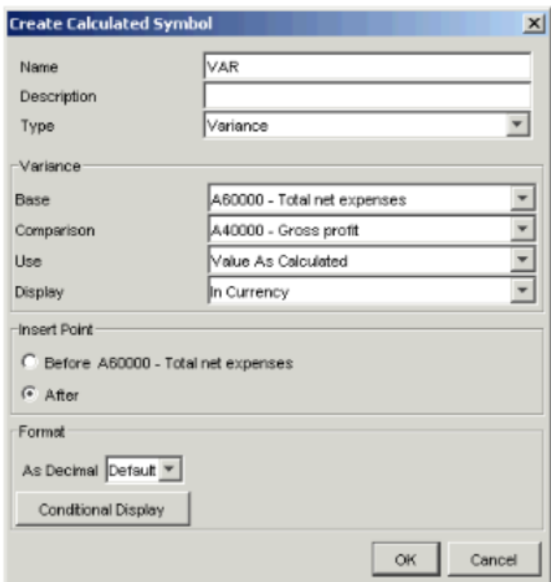
A calculated variance row or column is a type of calculated symbol that shows the difference between two other rows or columns as either a currency value, a percentage, or both.

When you place the cursor over this row or column, the calculation appears in a ScreenTip. You may be able to create a calculated variance row or column.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To create a calculated variance row or column, follow these steps.

1. Click on a symbol next to which you want to create a calculated symbol.
2. Right-click the symbol name. A pop-up menu appears.
3. Choose Insert Calculated Symbol. The Create Calculated Symbol dialog appears.
4. For **Type**, select **Variance**. The appearance of the dialog changes.

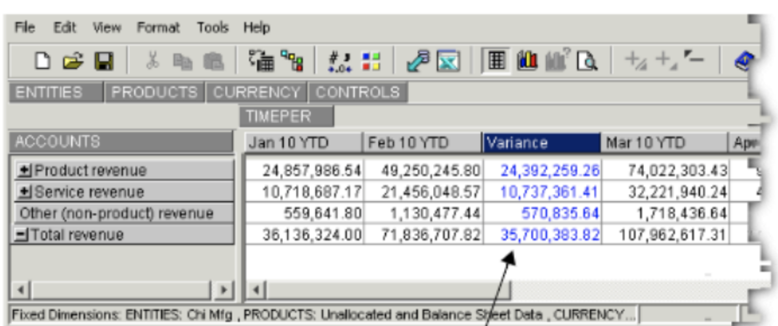


5. Complete these fields:

Field	Description
Name	Type a name for the variance row or column.
Description	Type a description for the variance row or column.
Type	You have already selected Variance.
Base	Select the base symbol against which you want to compare another symbol, to derive the variance between the two.
Comparison	Select the symbol you want to compare with the base symbol.

Field	Description
Use	Select one of the following: ▪ Value As Calculated: To show the value as it is calculated whether positive or negative. ▪ Absolute Value: To show the value as a positive number only.
Display	Select one of the following: ▪ In Currency: To show the variance as a currency value. ▪ As a Percentage: To show the variance as a percentage. ▪ Both: To show the variance as both a currency value and a percentage. If you select this option, two calculated rows or columns appear.
Insert Point	Select the location of the comparison row or column. You can place it either before or after the symbol you selected in step 1.
Decimal	Select the number of decimal places to include in the calculated data. To retain the global decimal setting for the calculated symbol, select Default.

6. You can create a condition for data in the calculated row or column, so that values meeting a certain condition are highlighted, filtered, or suppressed altogether.
   - To create a calculated row or column without a condition, proceed to step 7.
   - To create a condition, click Conditional Display, and complete the dialog, as described in Working with conditions.
7. Click OK. The view appears, showing the calculated row or column.



calculated column shows variance

If you hold the cursor over a cell in the calculated row or column, a ScreenTip appears, showing the formula.

Creating a percentage row or column

A calculated percentage row or column is a type of calculated symbol that shows the value of each symbol in a selected row or column as a percentage of one of the symbols in that same row or column.

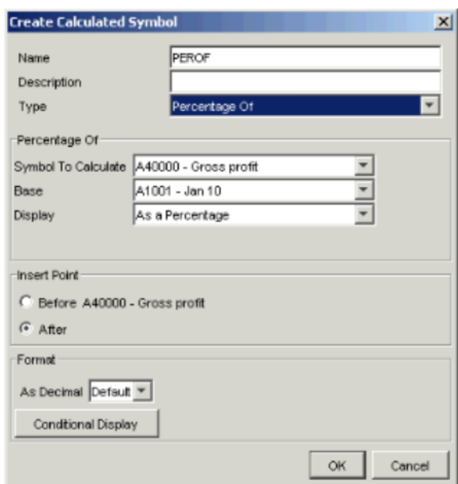
When you place the cursor over this row or column, the calculation appears in a ScreenTip.

You may be able to create a calculated percentage row or column.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To create a calculated percentage row or column, follow these steps.

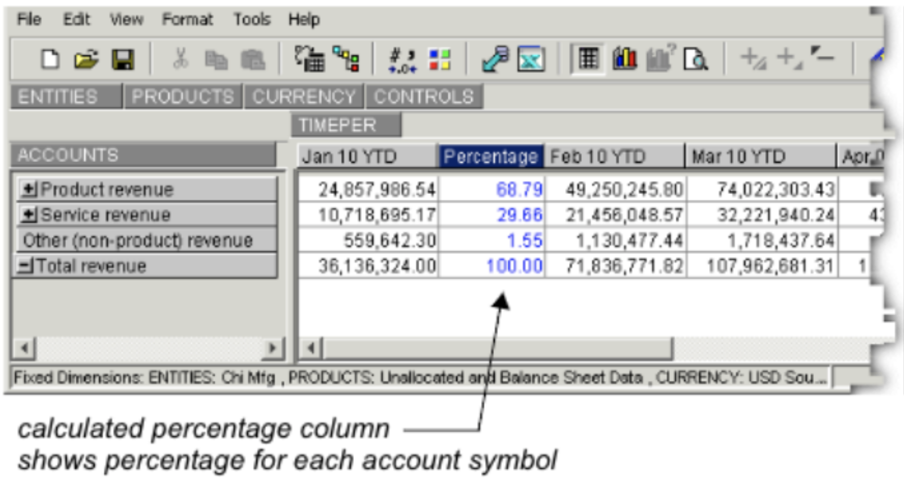
1. Click on a symbol next to which you want to create a calculated symbol.
2. Right-click the symbol name. A pop-up menu appears.
3. Choose Insert Calculated Symbol. The Create Calculated Symbol dialog appears.
4. For Type, select **Percentage of**. The appearance of the dialog changes.



5. Complete these fields:

Field	Description
Name	Type a name for the percentage row or column.
Description	Type a description for the percentage row or column.
Type	You have already selected Percentage Of.
Symbol To Calculate	Select the symbol, the values of which you want to view as a percentage of the values of another symbol.
Base	Select the base symbol which is given the value of 100%, against which the other symbols in the row or column are compared.
Display	Select whether you want the data shown as a percentage or as a decimal.
Insert Point	Select the location of the comparison row or column. You can place it either before or after the symbol you selected in step 1.
Decimal	Select the number of decimal places to include in the calculated data. To retain the global decimal setting for the calculated symbol, select Default.

6. You can create a condition for data in the calculated row or column, so that values meeting a certain condition are highlighted, filtered, or suppressed altogether.
   - To create a calculated row or column without a condition, proceed to step 7.
   - To create a condition, click Conditional Display, and complete the dialog, as described in Working with conditions.
7. Click OK. The view appears, showing the calculated row or column.



If you hold the cursor over a cell in the calculated row or column, a ScreenTip appears, showing the formula.

Creating a formula row or column

A calculated formula row or column is a type of calculated symbol that shows data that has been calculated according to a particular algebraic formula. For example, you might want to create a formula that performs a Quick Ratio calculation:

(Total cash + Other current assets + Accounts receivable) / Total current liabilities

When you place the cursor over this row or column, the calculation appears in a ScreenTip.

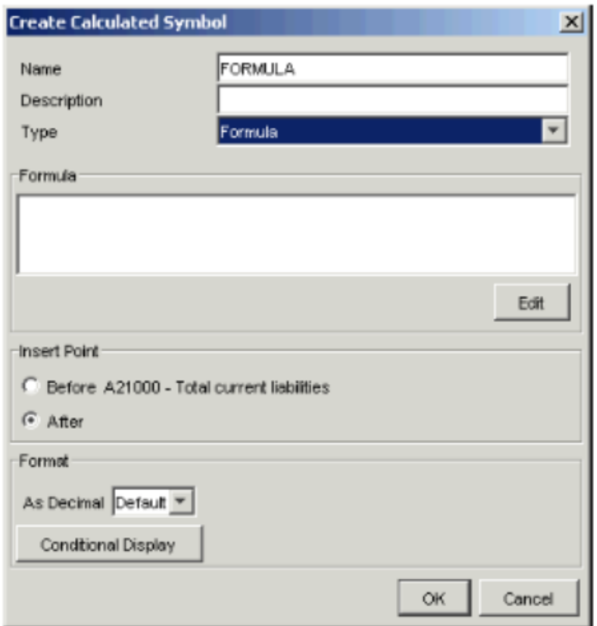
You may be able to create a calculated formula row or column.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To create a calculated formula row or column, follow these steps.

1. Click on a symbol next to which you want to create a calculated symbol.
2. Right-click the symbol name. A pop-up menu appears.

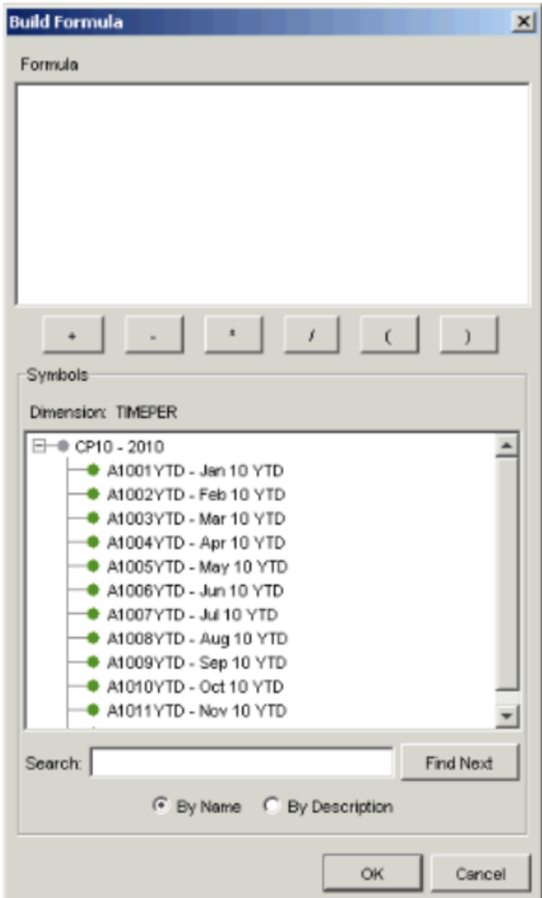
3. Choose Insert Calculated Symbol. The Create Calculated Symbol dialog appears.
4. For Type, select **Formula**. The appearance of the dialog changes.



5. Complete these fields:

Field	Description
Name	Type a name for the formula row or column.
Description	Type a description for the formula row or column.
Type	You have already selected Formula.
Insert Point	Select the location of the calculated row or column. You can place it either before or after the symbol you selected in step 1.
Decimal	Select the number of decimal places to include in the calculated data. To retain the global decimal setting for the calculated symbol, select Default.

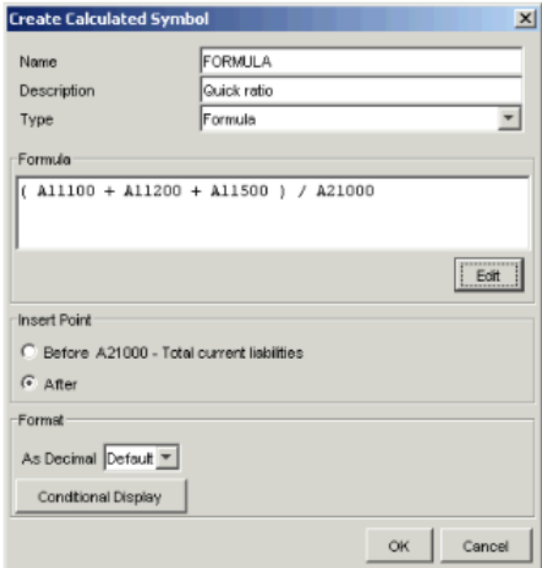
6. For Formula, type the formula you want to apply to the calculated row or column. If you are not sure how to create a formula, click Edit. The Build Formula dialog appears.



7. To create a formula, do any of the following:

   - In Formula, type the formula using your keyboard.
   - To use the value of a symbol for the formula, navigate through the hierarchy in Available Symbols, and double-click the symbol to select it.
   - To use the value of a symbol for the formula, type the full or partial symbol name in the Search field. Click Find Next and double-click the symbol to select it.
   - To use the value of a floating time period (for formulas in the TIMEPER dimension only), navigate through the time periods hierarchy in the Available Symbols list, and double-click a floating time period (indicated by an asterisk) to select it. You may also type the attribute name of the floating time period, enclosed in square brackets, in Formula (for example, [SGPCurrentYear]). For more information on floating time periods, see Using floating time period symbols.
   - To insert mathematical operators (+ , - , and so on), type them, or click the buttons under Formula.
   - Use any combination of the above.

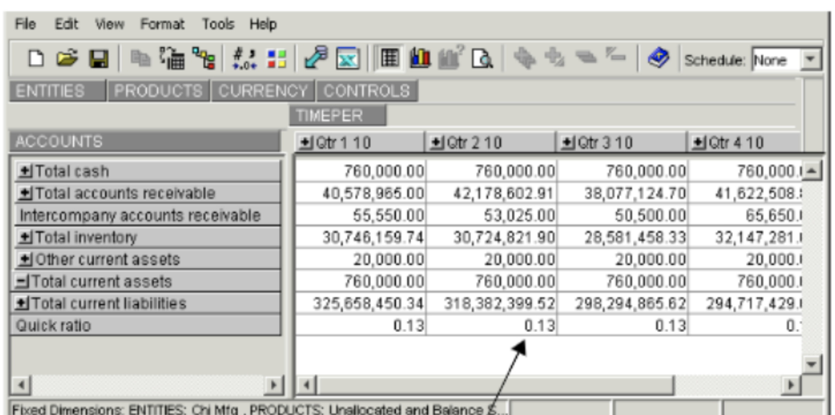
8. When you are finished creating the formula, click OK. The Create Calculated Symbol dialog appears, showing the formula in the Formula field.



9. You can create a condition for data in the calculated row or column, so that values meeting a certain condition are highlighted, filtered, or suppressed altogether.

   - To create a calculated row or column without a condition, proceed to step 10.
   - To create a condition, click Conditional Display, and complete the dialog, as described in Working with conditions.

10. Click OK. The view appears, showing the calculated row or column.



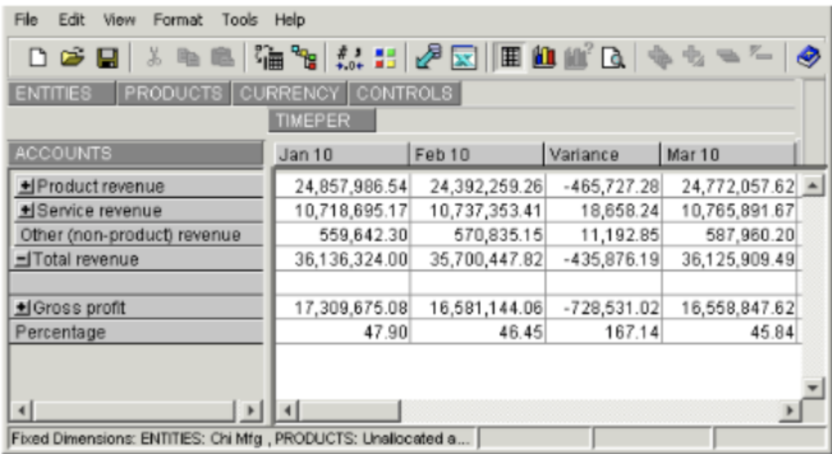
calculated formula row

If you hold the cursor over a cell in the calculated row or column, a ScreenTip appears, showing the formula.

Defining calculation order for calculated rows and columns

When you have more than one calculated symbol in a template, or DataView, you can determine the order in which these symbols are calculated. This is useful when two or more calculated symbols intersect, or when one calculation depends on the results of another.

For example, the following illustration contains two calculated symbols — a variance symbol in the down direction, and a percentage symbol in the across direction.



The variance column shows the variance between two time periods for all displayed accounts. The percentage row shows Gross Profit as a percentage of Total revenue over the course of the year.

In this case, where the two calculated symbols intersect, you would typically want the percentage symbol to be calculated and displayed. This is precisely what happens as a default, because the percentage symbol is in the down dimension and the inner down dimension always “wins” as a default.

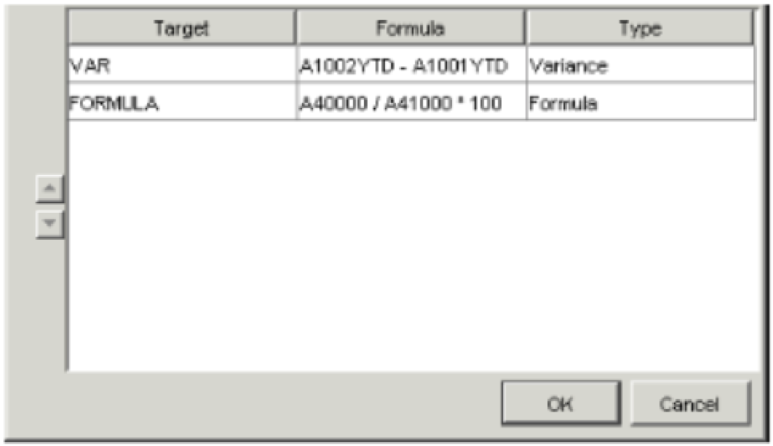
However, if the dimension orientation gets reversed, the desired calculated symbol is no longer displayed. You can make sure that where the calculations intersect, the percentage symbol always gets calculated last (and is thus the calculation displayed) by defining the calculation order.

Depending on your role, you may be able to define the order in which calculated symbols are calculated.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To specify the order in which calculated symbols are calculated, follow these steps.

1. In the view window, choose Tools > Calculation Order. The Calculation Order dialog appears, listing all calculated symbols in the view.



The calculations are listed in the order in which they are calculated, from the top down. This means that where calculated symbols intersect, the calculation lower in the list is the one that appears, because it is calculated last.

2. Select the calculation that you want to relocate.
3. Use the arrow buttons to move the calculation either up or down in the list.

Editing a calculated row or column

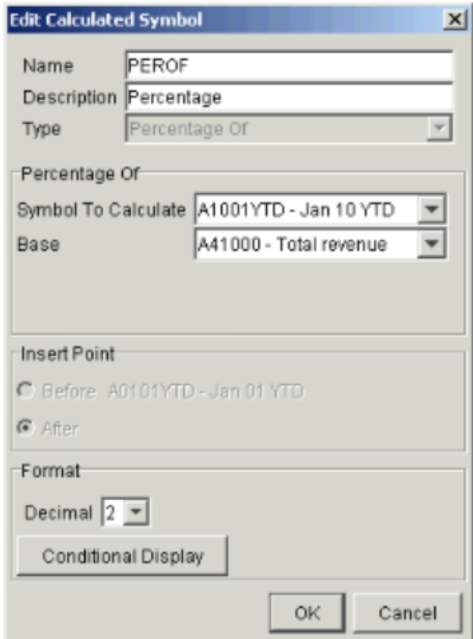
Once you have created a calculated symbol, you may be able to make changes to it, as new requirements arise.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To edit a calculated row or column, follow these steps.

1. In the view window, click the calculated symbol name to highlight it.
2. Right-click the symbol name. A pop-up menu appears.

3. Choose Edit Calculated Symbols. The Edit Calculated Symbol dialog appears.



4. Make changes to the calculated row or column, in the same way you created it. For more information, see
   - Creating a ratio row or column
   - Creating a variance row or column
   - Creating a percentage row or column or
   - Creating a formula row or column.

Deleting a calculated row or column

If you do not need a calculated symbol, you may be able to delete it.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To delete a calculated row or column, follow these steps.

Caution: Warnings provide cautionary information on the possible effect of certain actions, including the unintentional deletion of data. Be sure to read and understand all warnings before performing a related procedure. If you follow this procedure, you cannot reverse your decision. Use with caution.

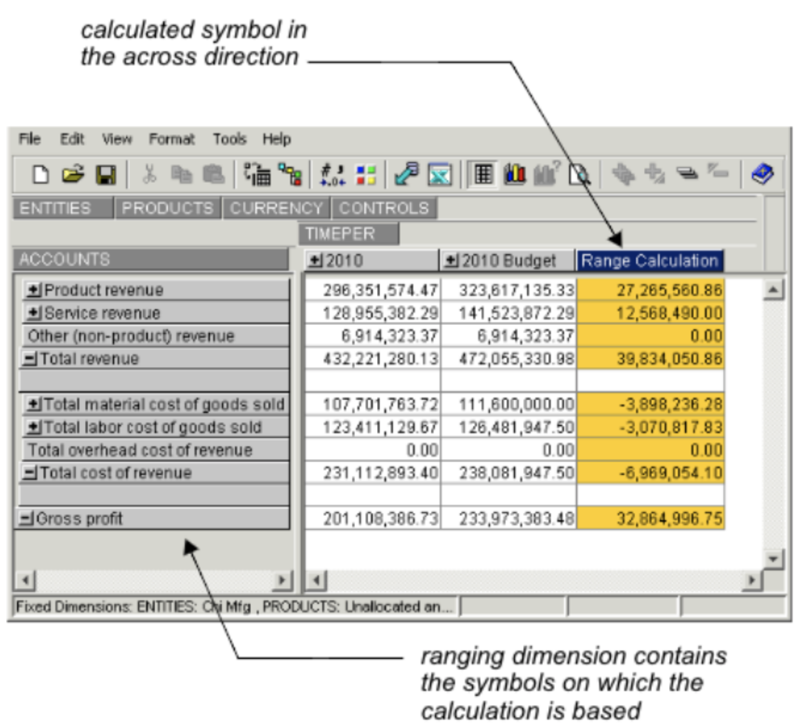
1. Click the calculated symbol name to highlight it.
2. Right-click the symbol name. A pop-up menu appears.
3. Choose Remove Calculated Symbols. The calculated row or column is deleted.

Working With Range Calculations

In regular calculated rows and columns, one calculation applies to the entire range of symbols within that row or column. Using range calculations, you can create calculated rows and columns in which you can define more than one calculation and apply them to different ranges of symbols within that row or column.

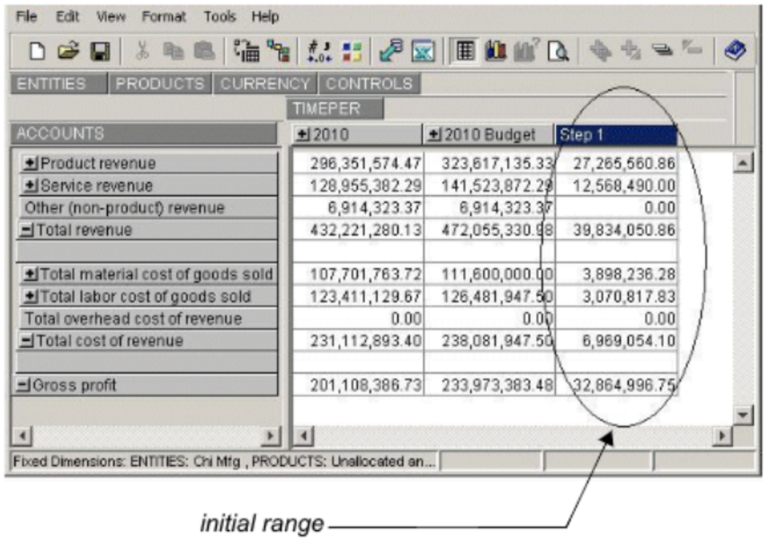
Understanding range calculations

You define a range by selecting a parent symbol in the ranging dimension. The ranging dimension is the dimension containing the symbols on which the calculation is based. By default, the ranging dimension is the innermost dimension in the opposite direction of the calculated symbol. For example:



You can make any dimension in either the down or across direction of your view the ranging dimension, as long as it resides in the opposite direction to the one containing the calculated symbol.

All child symbols beneath the selected parent symbol are included in the range and are thus subject to the same calculation. For example, in the previous example, the initial range is Gross profit and all its children.

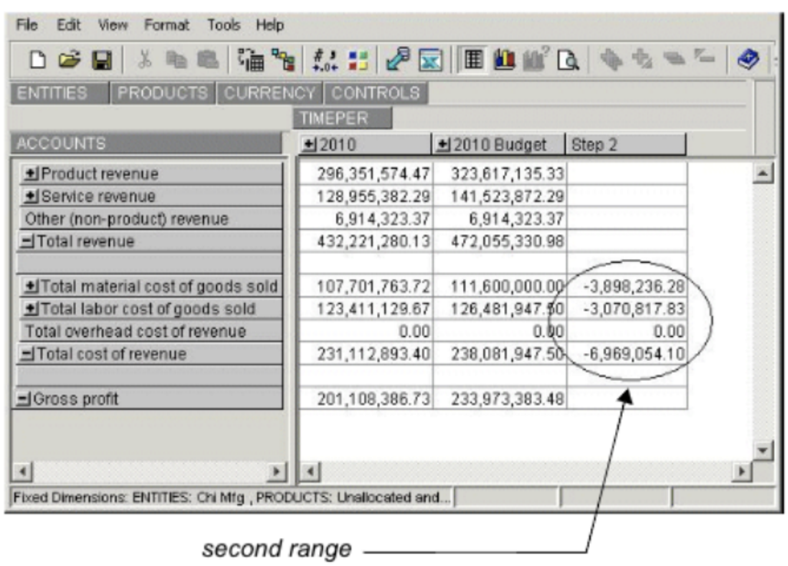


In this example, all symbols in the initial range are subject to the following calculation:

2003 - 2003 Budget

This calculation results in all calculated data being shown as positive.

To show the expense accounts as negative, you must define a second range with a different calculation.



All symbols in this range are subject to the following calculation:

2003 Budget – 2003

This calculation results in all data in the second range being shown as negative.

You can add as many ranges as you want. The order in which you create ranges does not matter. Ranges are calculated according to their position in the hierarchy from the top of the hierarchy down.

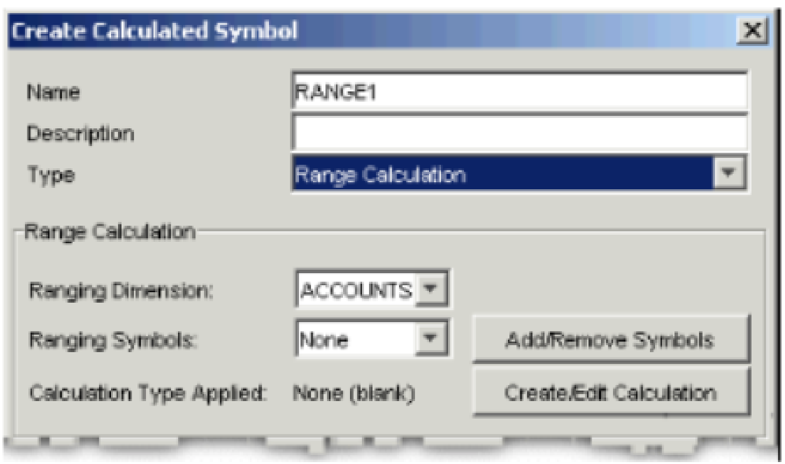
Creating range calculations

Depending on your role, you may be able to create range calculations within a calculated symbol.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To create range calculations within a calculated symbol, follow these steps.

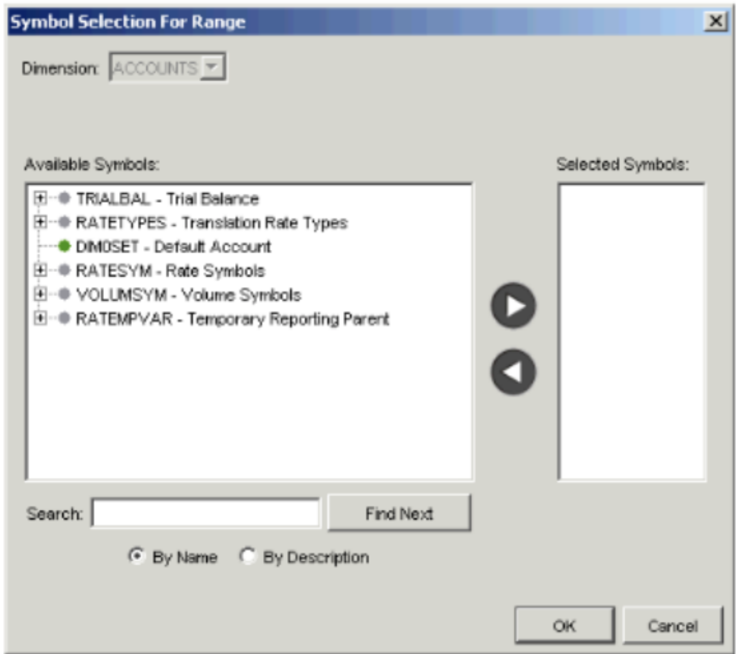
1. Click on a symbol next to which you want to create a calculated symbol.
2. Right-click the symbol name. A pop-up menu appears.
3. Choose Insert Calculated Symbol. The Create Calculated Symbol dialog appears.
4. For Type, select **Range Calculation**. The appearance of the dialog changes.



5. Complete these fields:

Field	Description
Name	Type a name for the range.
Description	Type a description for the range.
Type	You have already selected Range Calculation.
Ranging Dimension	Select the dimension containing the parent symbols within which you want to specify ranges of symbols.

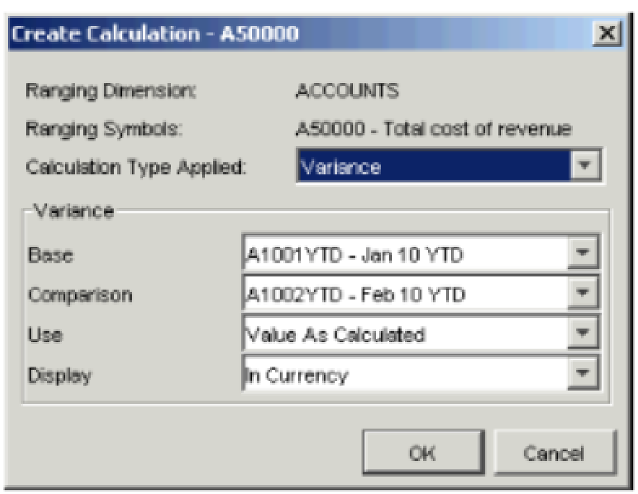
6. Click Add/Remove Symbols. The Symbol Selection For Range dialog appears.



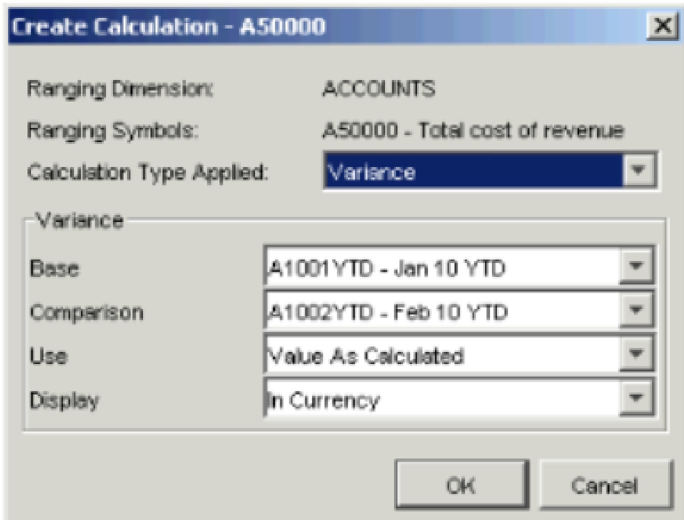
7. Complete the following:

Field	Description
Available Symbols and Selected Symbols	Find the symbols within which you want to define symbol ranges in the Available Symbols list and click the arrow to move them to the Selected Symbols list. You may select as many symbols as necessary.

8. Click OK. The Create Calculated Symbol dialog appears with the symbols you selected in the **Ranging Symbols** drop-down list.



9. For Ranging Symbols, select a symbol within which you want to create a range calculation.
10. Click Create/Edit Calculation. The Create Calculation dialog appears.



11. Define the calculation to apply to the range as described in:
    - Creating a ratio row or column
    - Creating a variance row or column
    - Creating a percentage row or column
    - Creating a formula row or column

    For Calculation Type Applied, you can select **None (blank)** if you do not want the range calculation performed on a parent symbol (and all its children) to apply to one or more child symbols (and all their children) within that parent symbol. In this case, you would have to create a separate range within the parent range, to which you would apply the **None (blank)** setting.
12. Repeat step 9 to step 11 for each range to include in the calculated column or row.

    > **Note:** The order in which you define the range calculations does not matter because ranges are calculated according to their position in the hierarchy — symbols higher in the hierarchy are calculated before symbols lower in the hierarchy.

13. When you are finished, click OK. The Create Calculated Symbol dialog appears.
14. Complete these fields:

Field	Description
Insert Point	Select the location of the calculated row or column. You can place it either before or after the symbol you selected in step 1.

Field	Description
Decimal	Select the number of decimal places to include in the calculated data. To retain the global decimal setting for the calculated symbol, select Default.

15. You can create a condition for data in the calculated row or column, so that values meeting a certain condition are highlighted, filtered, or suppressed altogether.

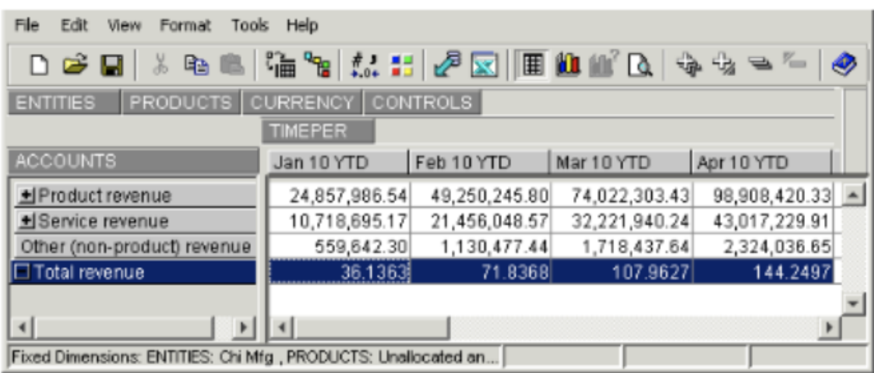
    - To create a calculated row or column without a condition, proceed to step 16.
    - To create a condition, click Conditional Display, and complete the dialog, as described in Working with Conditions.

16. Click OK. The view appears, showing the calculated row or column.

Editing Symbol Formats

Depending on your role, you may be able to edit the appearance of individual symbols in a template, DataView, or view. For example, you may want to change the scaling of the symbol's data, the number of decimals shown in the symbol's data, or the description of the symbol itself.

For example, in the following illustration, the scaling and number of decimals for the Total revenue symbol have been changed.



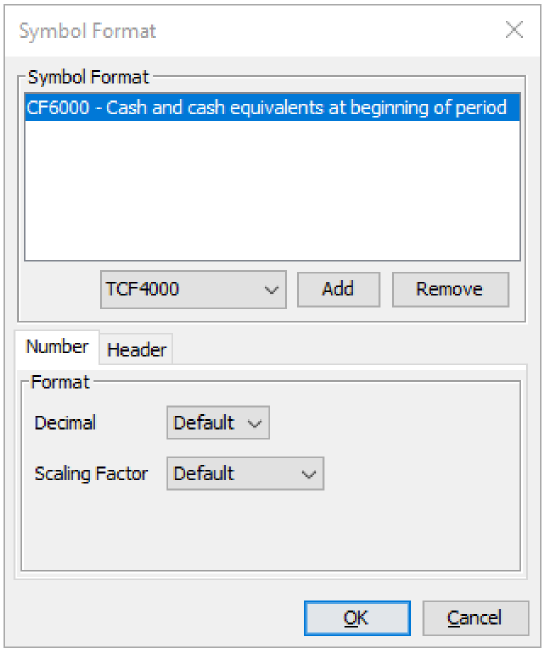
When you define individual symbol formats, those settings override the global settings for the file.

Depending on your role, you may be able to perform this task.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To edit the format of an individual symbol, follow these steps.

1. Right-click on the symbol you want to edit. A pop-up menu appears.
2. Choose Edit Symbol Format. The Symbol Format dialog appears, with the Number tab in view.



In the Symbol Format section, make sure the symbol you want to edit is selected.

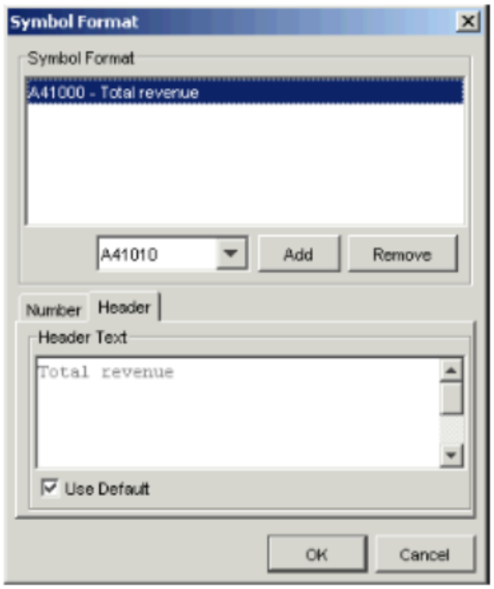
To add symbols to the list, select them in the drop-down list, and click Add.

To remove symbols from the list, select them and click Remove.

Complete these fields.

Field	Description
Decimal	Select the number of decimal places for the symbol’s data. If you select Default, the global template setting specified in the Number Format dialog is applied. For more information, see Specifying number formats. The results of allocation calculations are rounded up to the precision you select here.
Scaling Factor	Select a scaling factor for the symbol’s data. Scaling refers to the format in which the data appears. For example, if you are dealing with very large numbers, you may want to view numbers in thousands or millions. Scaling makes the numbers easier to read. For example, to view the number “10,000” as “10”, select 000s to specify that all numbers appear in thousands. If you select Default, the global template setting specified in the Number Format dialog is applied. For more information, see Specifying number formats.

3. Click the **Header** tab.

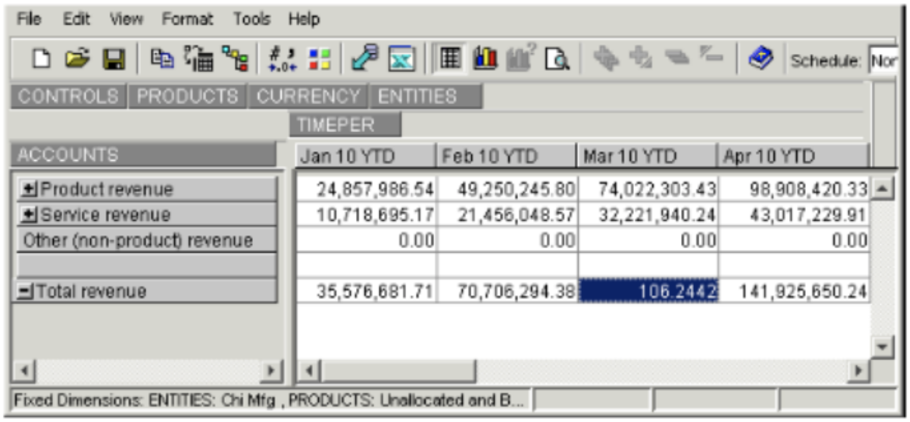


4. Do one of the following:
   - To change the description of the symbol, clear the Use Default field, and type the new description in the Header Text field. The description can contain a maximum of 100 characters.
   - To use the default symbol description, select Use Default.
5. Click OK. The symbol is reformatted.

Editing Cell Formats

Depending on your role, you may be able to edit the format of individual cells in a template, DataView, or view. For example, you may want to change the scaling of the cell's data, or the number of decimals shown in the cell's data.

For example, in the following illustration, the scaling and number of decimals for the selected cell have been changed.

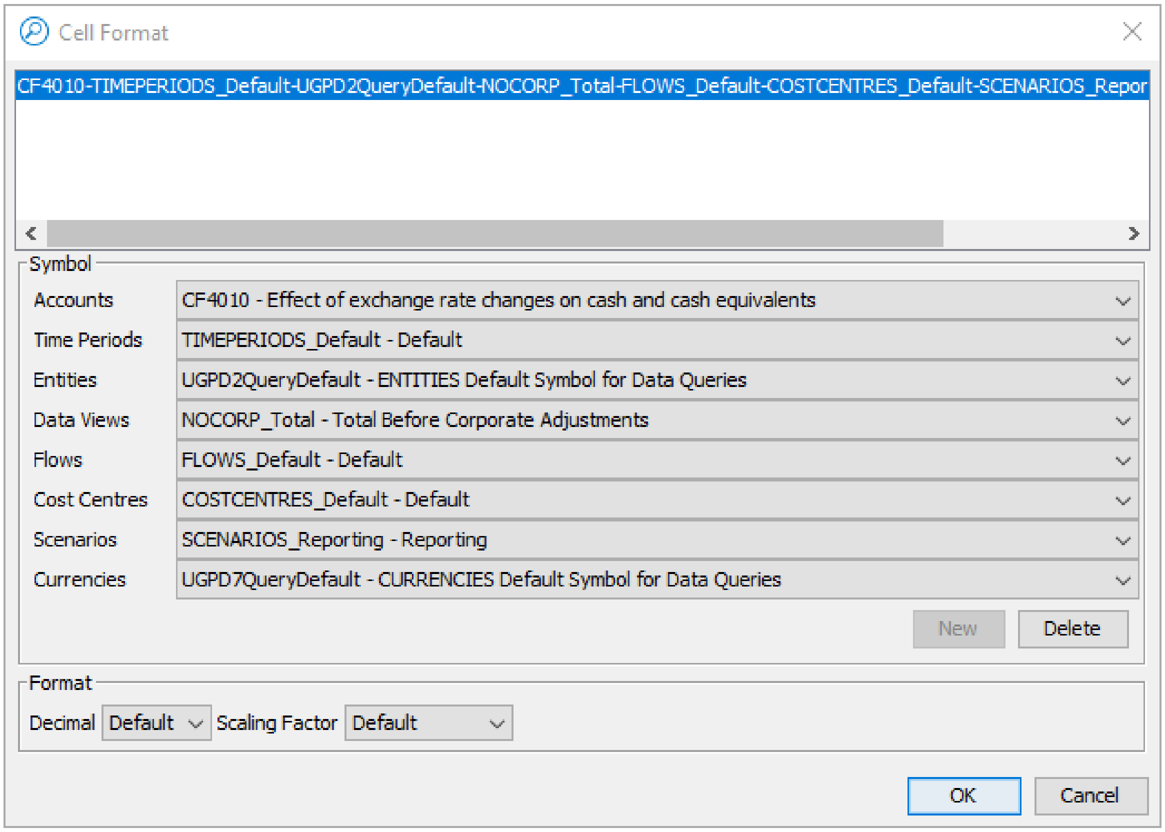


When you define individual cell formats, those settings override the format settings of the symbols to which that cell belongs, as well as the global format settings for the file. Depending on your role, you may be able to perform this task.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To edit the format of an individual cell, complete these steps.

1. Right-click on the cell you want to edit. A pop-up menu appears.
2. Choose **Edit Cell Format**. The Cell Format dialog appears, with the coordinates of the cell you want to edit highlighted in the list box.



3. In the list box, make sure the cell you want to edit is selected.

   - To add cells to the list, select the coordinates of the cell to edit in the Symbol section, and click New.
   - To remove cells from the list, select them and click Delete.

4. Complete these fields.

Field	Description
Decimal	Select the number of decimal places for the cell's data. If you select Default, the setting specified in the Symbol Format dialog is applied. For more information, see Editing symbol formats. The results of allocation calculations are rounded up to the precision you select here.
Scaling Factor	Select a scaling factor for the cell's data. Scaling refers to the format in which the data appears. For example, if you are dealing with very large numbers, you may want to view numbers in thousands or millions. Scaling makes the numbers easier to read. For example, to view the number "10,000" as "10", select 000s to specify that all numbers appear in thousands. If you select Default, the setting specified in the Symbol Format dialog is applied. For more information, see Editing symbol formats.

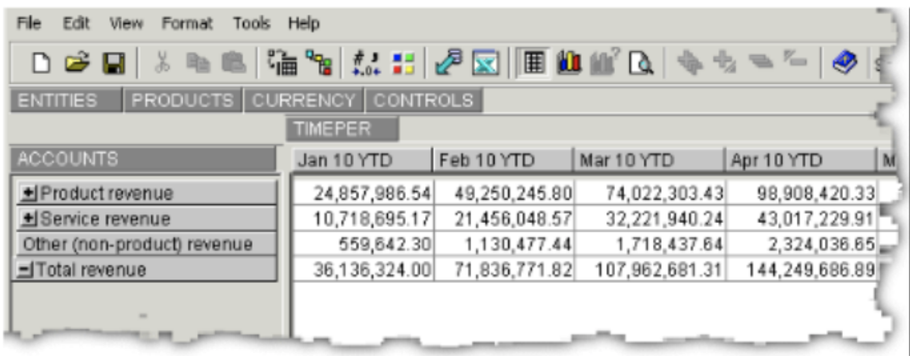
5. Click OK. The cell is reformatted.

Hiding Symbols

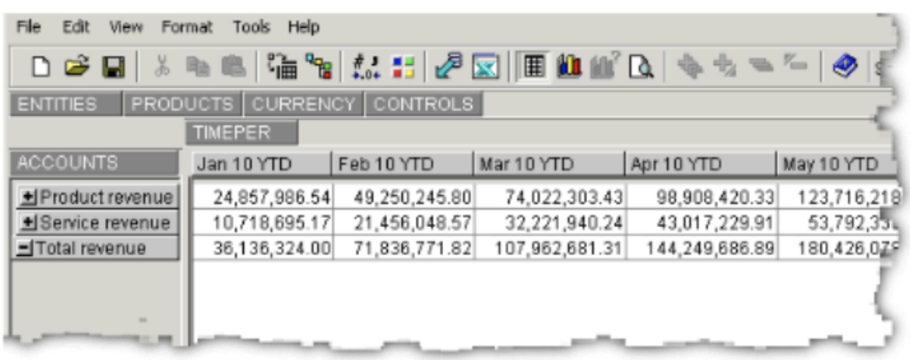
You may be able to hide an individual symbol if it contains data that would clutter the screen with extraneous detail but is still needed for calculations.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

For example, in the following illustration, you may want to hide one or more of the child symbols rolling up to Total revenue to see their siblings more clearly in relation to the value of the **parent symbol**.

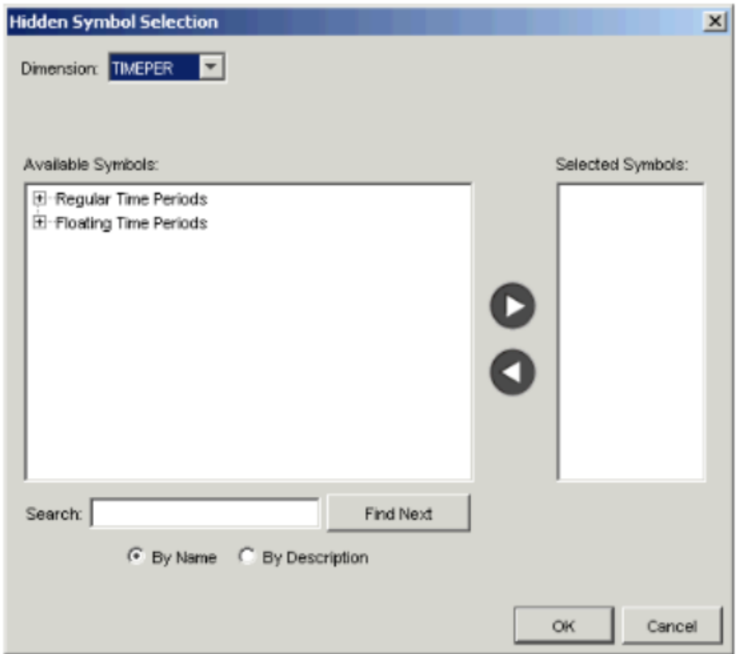


Once their siblings have been hidden, Product revenue and Service revenue are more easily identifiable as a proportion of Total revenue.



To hide symbols, follow these steps.

1. In the file window, choose Edit > Hidden Symbols. The Hidden Symbol Selection dialog appears.



2. Complete the following.

Field	Description
Dimension	Select the dimension containing the symbols you want to hide.

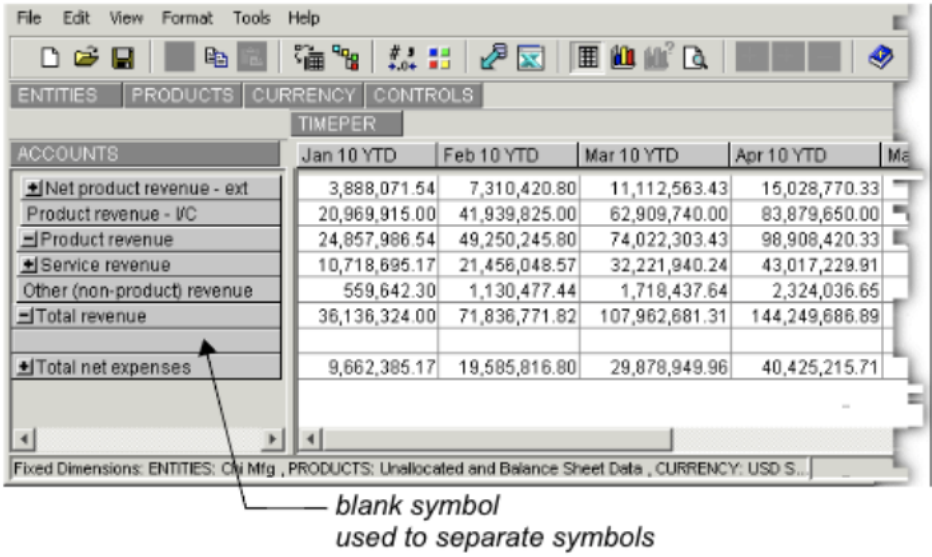
3. Select symbols, as required.
4. When you are finished, click OK.

Note: Alternatively, you can right-click on a symbol name or description, and in the menu that appears, choose Hide Symbol. The symbol (and all its children) is hidden. To see all hidden symbols, right-click on any symbol name or description, and in the menu that appears, choose Show Hidden Symbols.

Adjusting Spacing With Blank Symbols

To make the data in a template, or DataView easier to read, you may want to separate certain symbols by inserting a blank row or column between them.

The following illustration shows a blank row to separate the total symbol from its child symbols.



The blank row above the Total row makes the data easier to read.

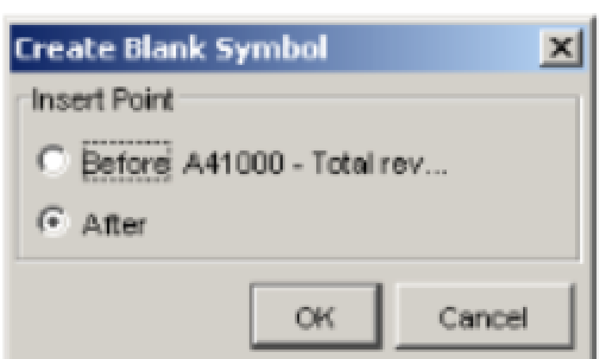
Creating a spacing row or column

To make data easier to read, you may want to separate certain symbols by inserting a blank row or column between them.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To add a blank row or column to a view, follow these steps.

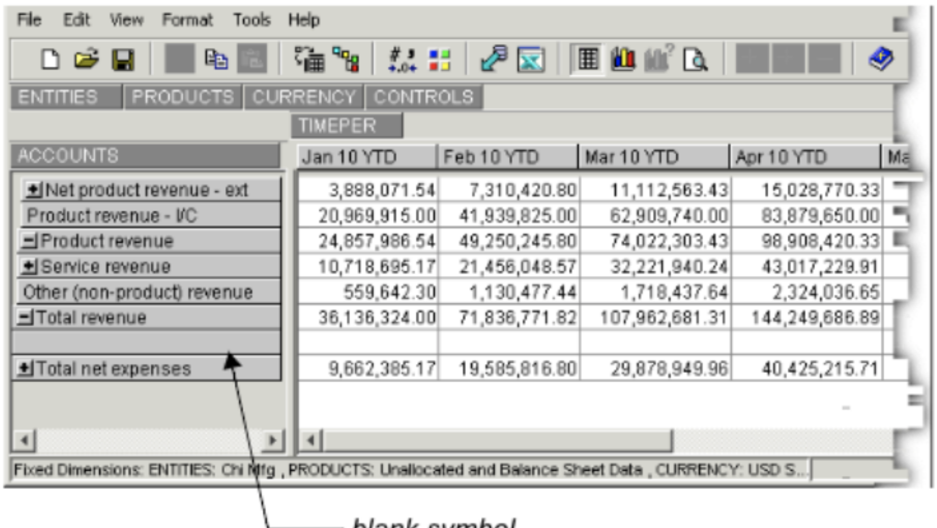
1. Click on a symbol next to which you want to create a blank symbol.
2. Right-click the symbol name. A pop-up menu appears.
3. Choose Insert Blank Symbol. The Create Blank Symbol dialog appears.



4. Complete these fields:

Field	Description
Before	To insert the blank symbol before the symbol you selected in step 1, select this field.
After	To insert the blank symbol after the symbol you selected in step 1, select this field.

5. Click OK. The view window appears, with the blank row or column.



blank symbol
used to separate symbols

Removing a spacing row or column from a view

To make data easier to read, a blank row or column may appear. If you do not need the blank row or column, you may be able to delete it.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To delete a blank row or column, follow these steps.

1. Right-click the symbol. A pop-up menu appears.
2. Choose Remove Blank Symbol. The view window appears, with the blank row or column removed.

Adding Links To A Template

If you want, you can attach links from your Longview Analysis and Reporting templates to external systems. This link might be to any external system that can accept a URL. The system on the receiving end must be able to interpret the URL and resolve the request.

You can create two kinds of links:

Link type	Description
Cell-level	Used to provide a link to an external URL, to provide additional information on a particular data cell. This type of link can be invoked from all cells in the template, except calculated cells or blank cells.
Template-level	Used to provide information related to the template as a whole, such as instructions, in a pdf file. This type of link can be invoked from all cells, or from the toolbar or menu.

Once a link is defined, you can assign it to one or more templates, and then publish the templates.

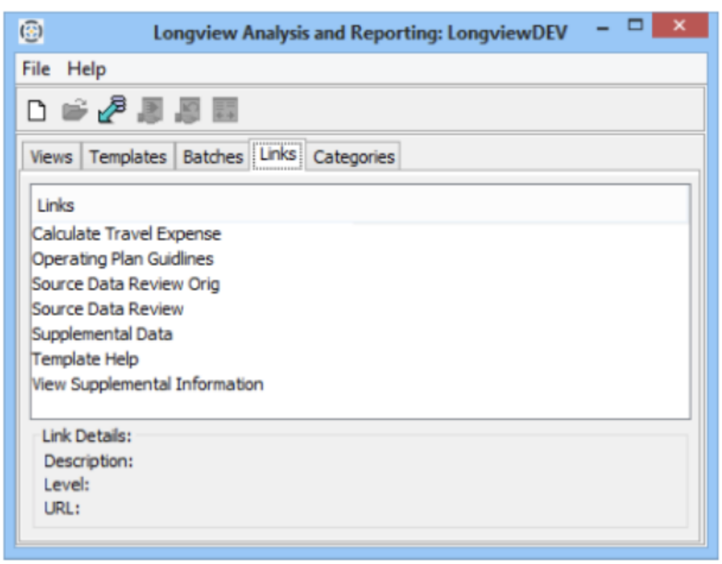
Creating a link

Depending on your role, you may be able to create links in the application.

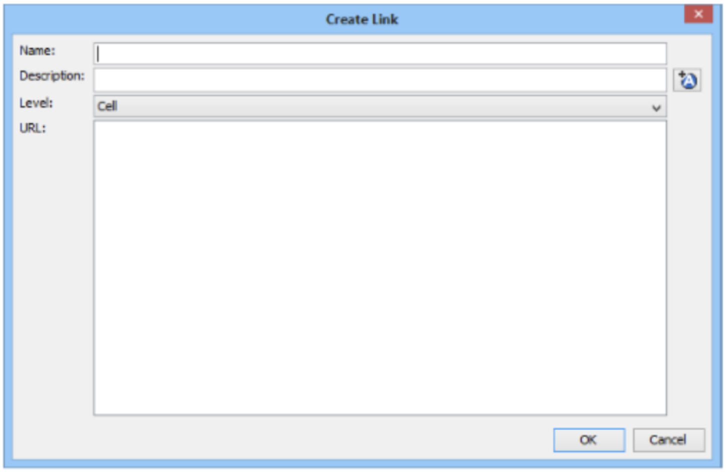
Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no

To create a link in the application, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Links** tab.



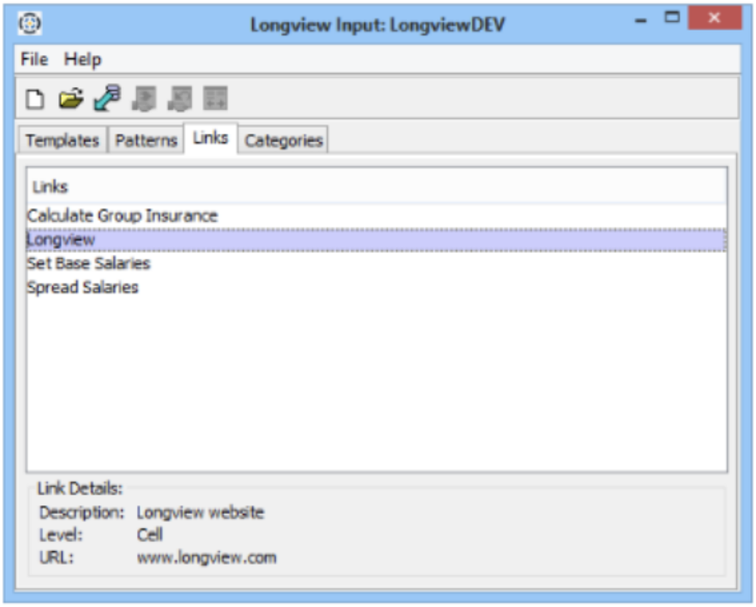
2. Choose File > New. The Create Link dialog appears.



3. Complete these fields:

Field	Description
Name	Type a name for the link.
Description	Type a description in the language of your current application.
Level	Select one of the following: ▪ Cell: Used to provide a link to an external URL with detailed information on a particular data cell. This type of link can be invoked from all cells except calculated cells or blank cells. ▪ Template: Used to provide information related to the template as a whole, such as instructions, and can be a pdf file. This type of link can be invoked from all cells, or from the toolbar or menu.
URL	Type the absolute URL of this external link. For more information, see Constructing a link URL and Editing a link.

4. Click OK. The Create Link dialog appears. Click OK. The new link appears in the Links tab.



Constructing a link URL

Depending on your needs, the URL of the link can be very simple, or very complex. It is your responsibility to ensure that the URL is valid.

Caution: The application is not responsible for link validation. If you specify an invalid URL to a link, users might see unexpected results, such as a blank Internet Explorer window.

Parameters

A parameter for the symbol name for each dimension, including schedules, exists.

For example:

```
%%ACCOUNTS%%

%%TIMEPER%%
```

For schedules, a parameter is required for the schedule name and schedule dimension name.

For example:

```
%%Sched_Name%%

%%Sched_Dim_Name%%
```

These parameters resolve to the symbol names for the data intersection of the cell the link was invoked from. These parameters are resolved when specified in the URL of a cell level link only. If they are specified in a template level link, they are not resolved. For more information, see Creating a link.

There are also parameters which resolve to a pipe-delimited list of root symbols included in the report. For the full report context, the parameters use the following naming convention: %%ROOTSDimensionName%%

These %%ROOTS%% parameters resolve to a pipe-delimited list of root symbols included in the report for the specified dimension. Hidden and suppressed root symbols will be included in the list if the user has symbol access to these symbols.

For example, you can create a template link to a Longview App using the following syntax:

```
LongviewApp=Details.lvapp&
ACCTROOTS=%%ROOTSACCOUNTS%%&RootTimePeriods=%%ROOTSTIMEPERIODS%%
```

In this example, if the report contains the Trial_Balance account and the Actual and Budget time periods, the link will resolve to:

```
LongviewApp=Details.lvapp& ACCTROOTS=Trial_
Balance&RootTimePeriods=Actual|Budget
```

Tokens

Use Web attribute tokens in the same way that they are used in Longview Dashboard Designer.

```
<%[[ATTRIBUTE,AttrClass,AttrName,ObjectName]]%>
```

where:

- AttrClass is SYSTEM, SYMBOL, USER, or GROUP.

  > **Note:** The GROUP attribute class can be used only with DESCRIPTION specified for the AttrName parameter, which retrieves the current user group description.

- AttrName is the attribute name.

  ObjectName is the attribute object. System attributes and the GROUP attribute class do not require an object. ObjectName is mandatory for symbol attributes and specifies the symbol name. ObjectName is optional for user attributes and specifies the user ID. If no ObjectName is specified, the current user ID is used.

  > **Note:** For cell level links, you can also specify parameters for the ObjectNameparameter; for example, %%ENTITIES%%.

  For example:

  ```
  <%[[ATTRIBUTE, SYMBOL, ZGPNativeCurrency, %%ENTITIES%%]]%>
  ```

Specifying the launch mode

When launching URLs from Report Viewer within the Longview Client, you have the option of defining whether the URL should open internally as a tab within the Longview Client or as an external window. Use the following URL parameter to define how the URL should be launched as follows:

```
LongviewLaunchMode=Internal|IE|DefaultBrowser
```

where:

- Internal specifies that the URL should open internally as a tab within the Longview Client. This is the default if the LongviewLaunchMode parameter is not specified.
- IE specifies that the URL should open externally using IE as the browser
- DefaultBrowser specifies that the URL should open externally using the default browser.

URL syntax

The link URL might look like this:

```
http://www.longview.com?TIMEPERIOD=<%[[ATTRIBUTE, SYSTEM,
ASCurrentPeriod]]%>http://www.longview.com?CURRENCY=<%[[ATTRIBUTE, SYMBOL,
ZGPNativeCurrency, %%ENTITIES%%]]%>&LongviewLaunchMode=Internal
```

Constructing a link to an App

You can also construct a link to an App. The link to an app can use the Parameters and Tokens mentioned above. The syntax for the link depends on how you launch the initiating Report.

Link to an App Syntax (for Reports and Apps launched standalone from the Dashboard)

For Reports launched from the Dashboard, the link must be constructed as a URL that refers to the smart client application, the web session parameters, the name of the App to launch and any pertinent parameters and tokens.

The link to an App might look like this:

```
Longview.ApplicationSmartClient.application?LongviewWebSID=<%
[[WEBVARIABLE,LongviewWebSID]]%>&LongviewWebBridge=<%
[[WEBBRIDGE]]%>&LongviewIdentifier=<%
[[WEBVARIABLE,LongviewIdentifier]]%>&LongviewLangCode=<%
[[WEBVARIABLE,LongviewLangCode]]%>&LongviewApp=Review%20Intercompany%20Trans
actions.lvapp&ACCOUNTS=%%ACCOUNTS%%&ENTITIES=%%ENTITIES%%&DETAILS=%%DETAILS%
%&SEGMENTS=%%SEGMENTS%%
```

Link to an App Syntax (for Reports and Apps launched within the Longview Client)

For Reports launched within the Longview Client (Performance Manager or Longview Tax), the link is simplified and only requires the name of the App to launch and any pertinent parameters and tokens.

The link to an App might look like this:

```
LongviewApp=Review%20Intercompany%20Transactions.lvapp&ACCOUNTS=%%ACCOUNTS%%
&ENTITIES=%%ENTITIES%%&DETAILS=%%DETAILS%%&SEGMENTS=%%SEGMENTS%%
```

Constructing a link to a report

You can also construct a link to a report. The link to a report can use the Parameters and Tokens mentioned above. The syntax for the link depends on how you launch the initiating Report.

Link to a Report Syntax (for reports launched standalone from the Dashboard)

For reports launched from the Dashboard, the link must be constructed as a URL that refers to the Longview Report Viewer client application, the web session parameters, the name of the Report to launch, and any pertinent parameters and tokens.

The link to a report might look like this:

```
Longview.ReportViewer.application?LongviewWebSID=<%

[[WEBVARIABLE,LongviewWebSID]]%>&LongviewWebBridge=<%
[[WEBBRIDGE]]%>&LongviewIdentifier=<%

[[WEBVARIABLE,LongviewIdentifier]]%>&LongviewLangCode=<%

[[WEBVARIABLE,LongviewLangCode]]%>&LongviewReportName=Review%20Intercompany%
20Transactions&selectedSymbols=ACCOUNTS:%%ACCOUNTS%%,ENTITIES:%%ENTITIES%%
```

Link to a Report Syntax (for reports launched within the Longview Client)

For reports launched within the Longview Client (Performance Manager or Longview Tax), the link is simplified and only requires the name of the report to launch, and any pertinent parameters and tokens.

The link to a report might look like this:

```
LongviewReportName=Review%20Intercompany%20Transactions&selectedSymbols=ACCO
UNTS:%%ACCOUNTS%%,ENTITIES:%%ENTITIES%%
```

Editing a link

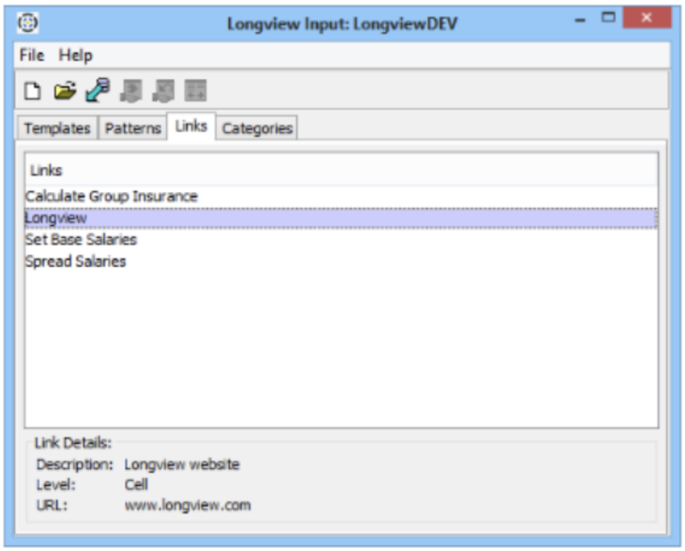
Once you have created a link, you may be able to make changes to it.

Role	Can perform this task?
Report Publisher	yes

Role	Can perform this task?
Report Author	no
Report User	no

To edit a link, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Links** tab.

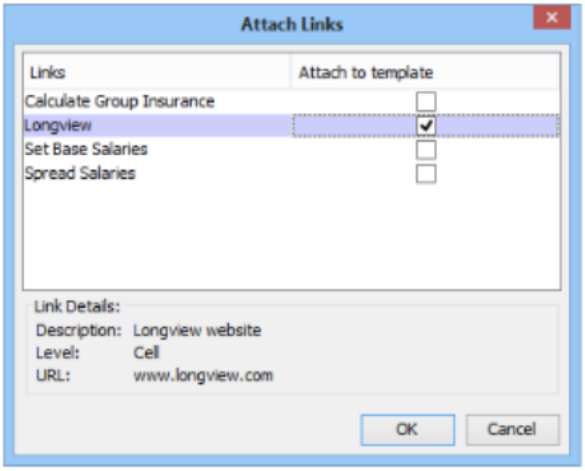


2. Choose File > Open. The Modify Link dialog appears. Attaching a link to a template
3. Once you have created links, you can attach them to a template in the application.

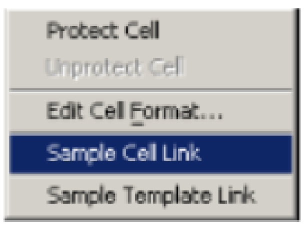
Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

4. To attach a link to a template, follow these steps.
5. Open a template.

6. To attach a link to the template, choose Links > Attach Links. The Attach Links dialog appears.



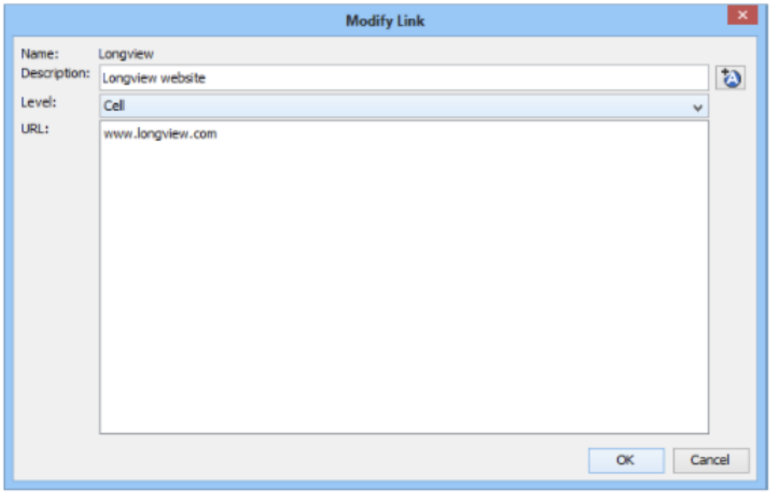
7. In the Attach to template column, select the links you want to attach to this template.
   - Users of this template are able to access both cell and template level links by right-clicking any cell other than a calculated cell or a blank cell.



   - Users of this template are also able to access all template level links from the Links menu in the application, or a Links icon in a report template.

8. Click OK.

9. When you are finished with this template, publish it so that the template and its links are available to users.



10. Edit as necessary. For more information, see Creating a link.

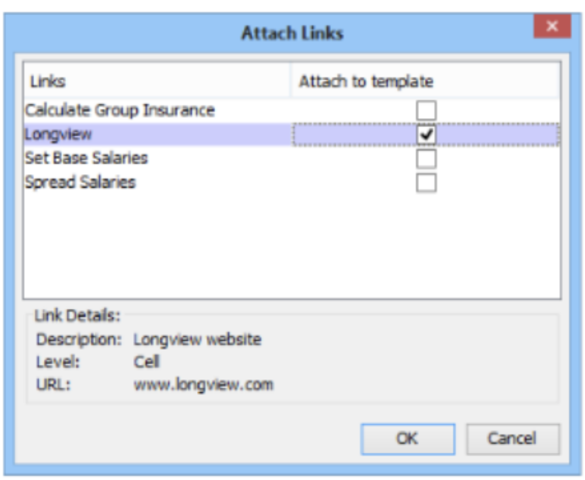
Attaching a link to a template

Once you have created links, you can attach them to a template in the application.

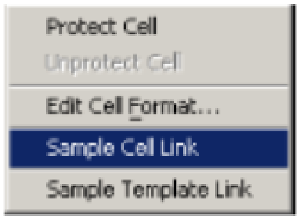
Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

To attach a link to a template, follow these steps.

1. Open a template.
2. To attach a link to the template, choose Links > Attach Links. The Attach Links dialog appears.



3. In the **Attach to template** column, select the links you want to attach to this template.
    - Users of this template are able to access both cell and template level links by right-clicking any cell other than a calculated cell or a blank cell.



    - Users of this template are also able to access all template level links from the Links menu in the application, or a Links icon in a report template.
4. Click OK.
5. When you are finished with this template, publish it so that the template and its links are available to users.

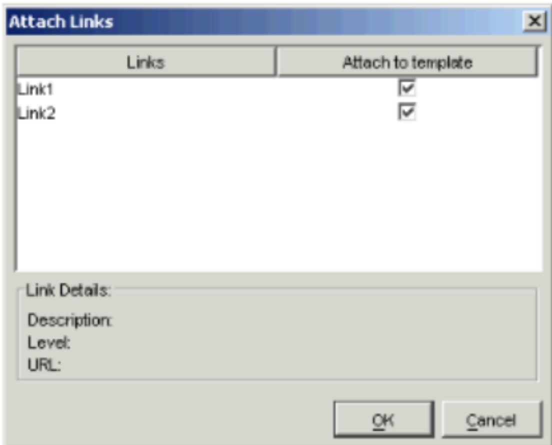
Detaching a link from a template

If you need to detach an attached link, you can do so.

Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

To detach a link from a template, follow these steps.

1. Open a template.
2. Choose Links > Attach Links. The Attach Links dialog appears, with the currently attached links identified with a check mark.



3. In the Attach to template column, remove the check marks as required.
4. Click OK.
5. When you are finished with this template, republish it so that the template is available to users, without the detached link.

Deleting a link

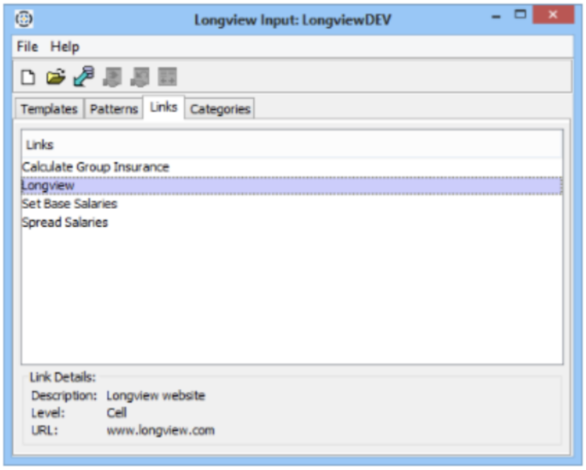
If you do not need a link, you may be able to delete it.

Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

Caution: If you follow this procedure, you cannot reverse your decision. Use with caution.

To delete a link, follow these steps.

1. In the Longview Analysis and Reporting dialog, click the **Links** tab.



2. Select the link and press the Delete key. A confirmation dialog appears.
3. Click Yes. The link is deleted. In existing templates with a deleted link attached, the link becomes obsolete and does not show up in the template.

Working With Report Batches

If you have several reports to run, you can save time by creating a batch to run them together, rather than individually.

Creating report batches

If you have several reports to run, you can save time by creating a batch to run them together, rather than individually. All types of users can run report batches. However, the contents of your batches depend on your role in the process.

Role	Can include these files in a batch
Report Publisher	■ DataViews (kdv) ■ published report templates (rtp) ■ batches (rbt) ■ published batches (rbt)
Report Author	■ DataViews (kdv) ■ published report templates (rtp) ■ published batches (rbt)
Report Users	■ published report templates (rtp) ■ published batches (rbt)

An asterisk (*) in the file name extension indicates that the file has been published.

Creating a report batch

If you have several reports to run, you can save time by creating a batch to run them together, rather than individually.

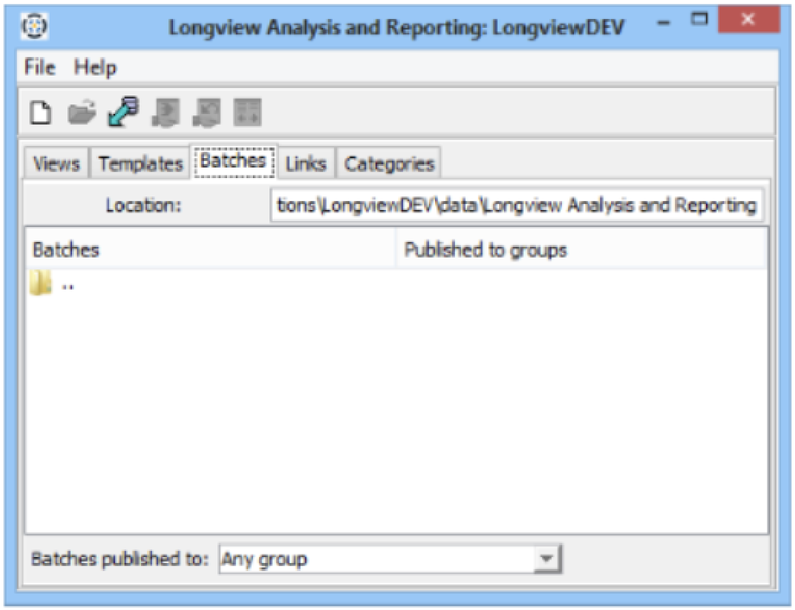
Role	Can perform this task?
Report Publisher	yes
Report Author	yes, but saved locally only.
Report Users	yes, but saved locally only.

The procedure you use differs depending on your role.

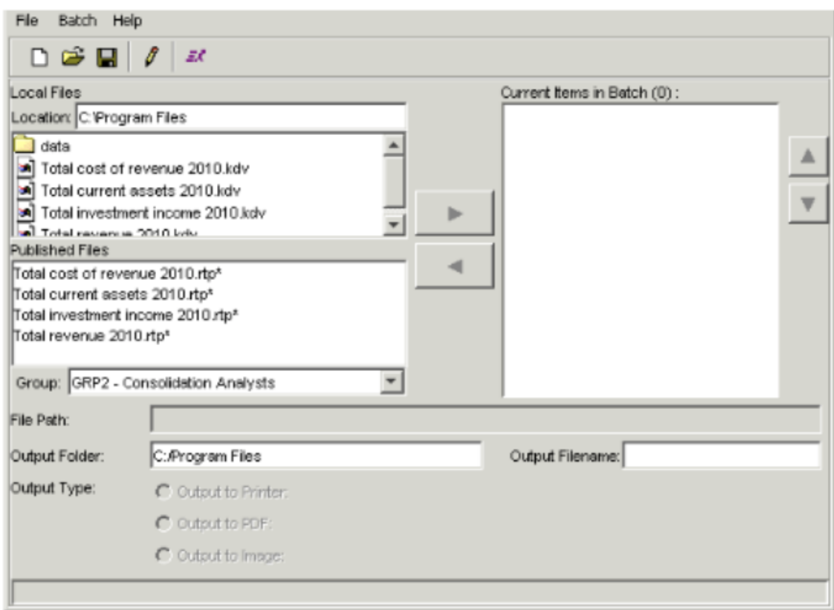
Report Publishers

To create a report batch, follow these steps.

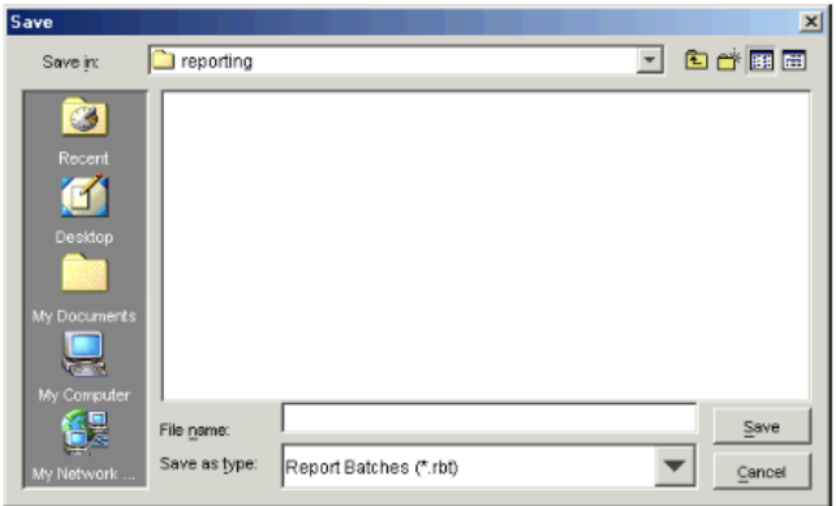
1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



2. Choose File > New. The Edit Report Batch dialog appears.



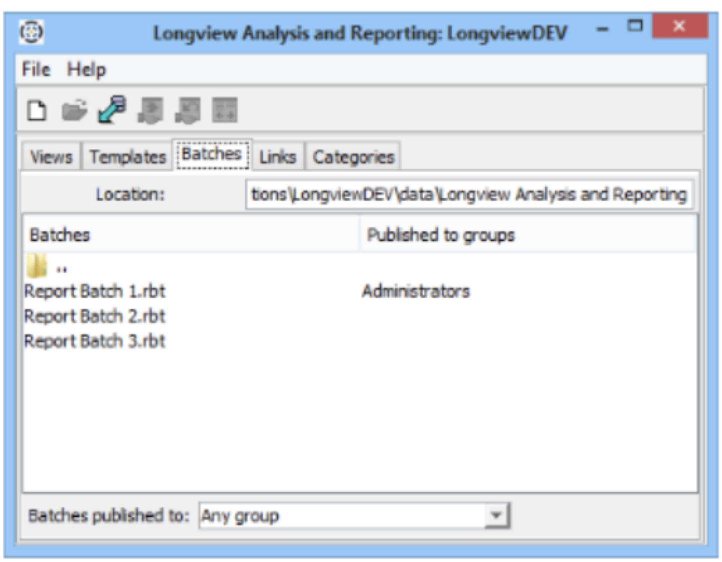
3. Choose File > Save As. The Save dialog appears.



4. Complete these fields:

Field	Description
Save in	If necessary, select the folder in which you want to save the batch.
File Name	Type a name for the report batch.
Files of type	Select Report Batches (*.rbt).

5. Click Save. The Edit Report Batch dialog appears, with the name of the report batch in the title bar.
6. Click the Close button in the top right corner. The Longview Analysis and Reporting dialog appears. If the report batch does not appear in the list, select **Any group** in the **Templates Published** to drop list.

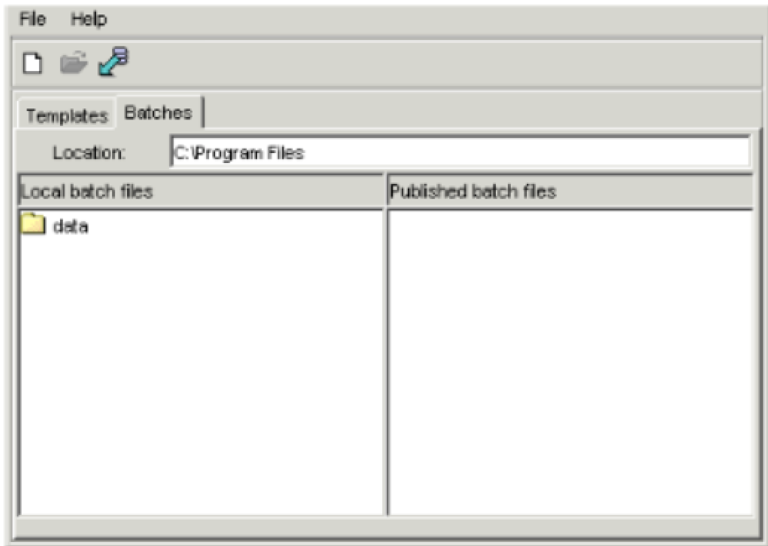


7. Once you have created the report batch, you can proceed to Adding report templates to a report batch, or Adding report batches to a report batch.

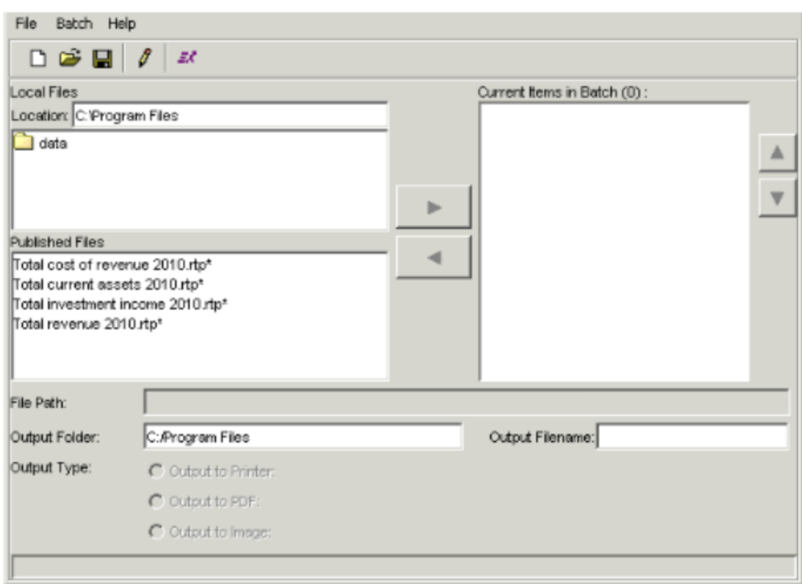
Report Authors and Users

To create a report batch, follow these steps.

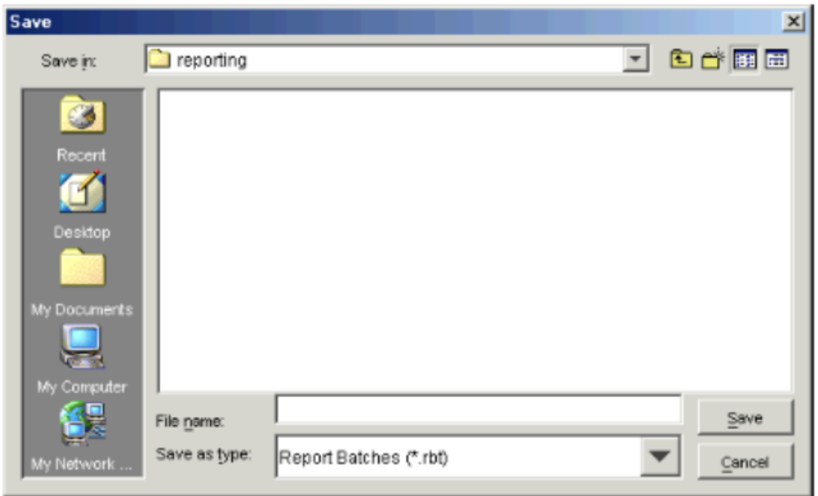
1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



2. Choose File > New. The Edit Report Batch dialog appears.



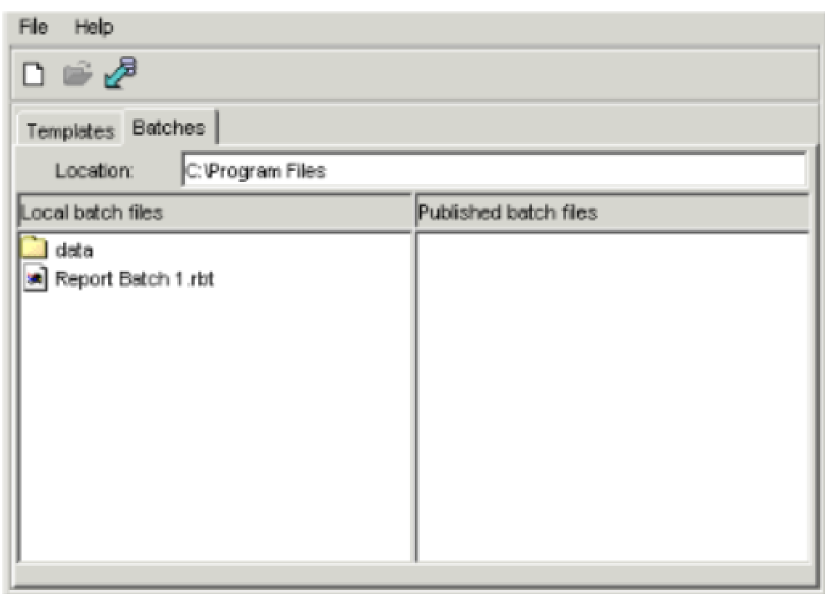
3. Choose File > Save As. The Save dialog appears.



4. Complete these fields:

Field	Description
Look in	If necessary, select the folder in which you want to save the batch.
File Name	Type a name for the batch.
Files of type	Select Report Batches (*.rbt).

5. Click Save. The Edit Report Batch dialog appears, with the name of the report batch in the title bar.
6. Click the Close button in the top right corner. The Longview Analysis and Reporting dialog appears.
7. Choose Tools > Refresh. The report batch appears in the **Local batch** files list.



8. Once you have created the report batch, you can proceed to Adding report templates to a report batch, or Adding report batches to a report batch.

Adding report templates to a report batch

After the report batch has been created, you can add reports to it.

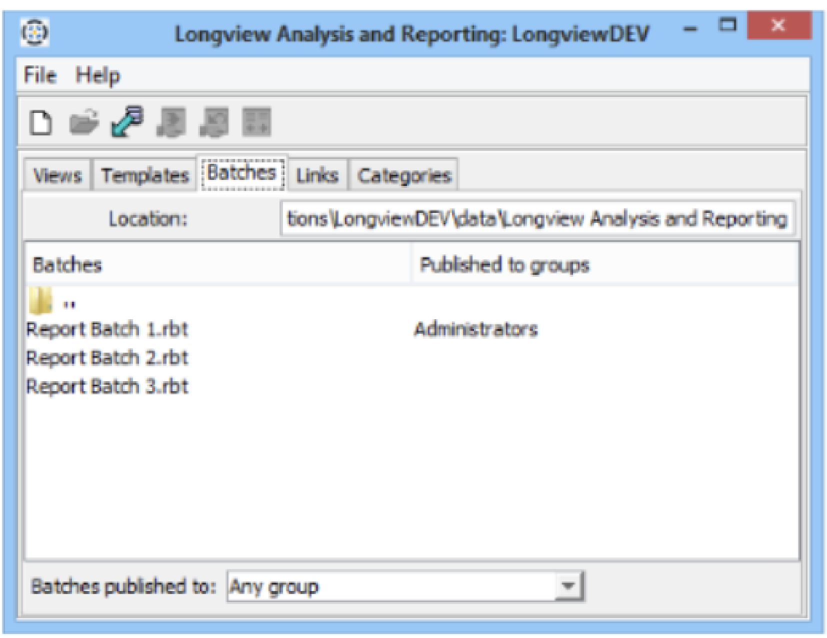
Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report Users	yes

The procedure you use differs depending on your role.

Report Publishers

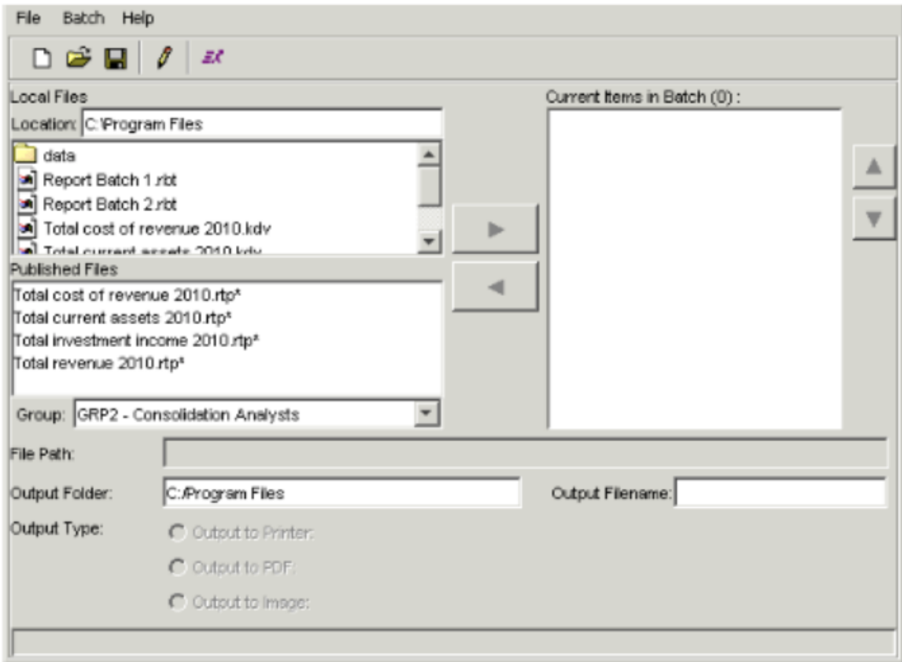
To add a report to a report batch, follow these steps.

1. Create the report batch, as described in Creating a report batch.
2. Open the Longview Analysis and Reporting dialog, and click the Batches tab.



3. If you want to add a report ***template*** to a report batch that you have published to the database, select the group to which you published it in the **Templates published** to drop-down list. A list of report batches published to that group appears. For a list of all report batches, select **Any group**.
4. Select the report batch to which you want to add a report template and choose File > Open. The Edit

Report Batch dialog appears.



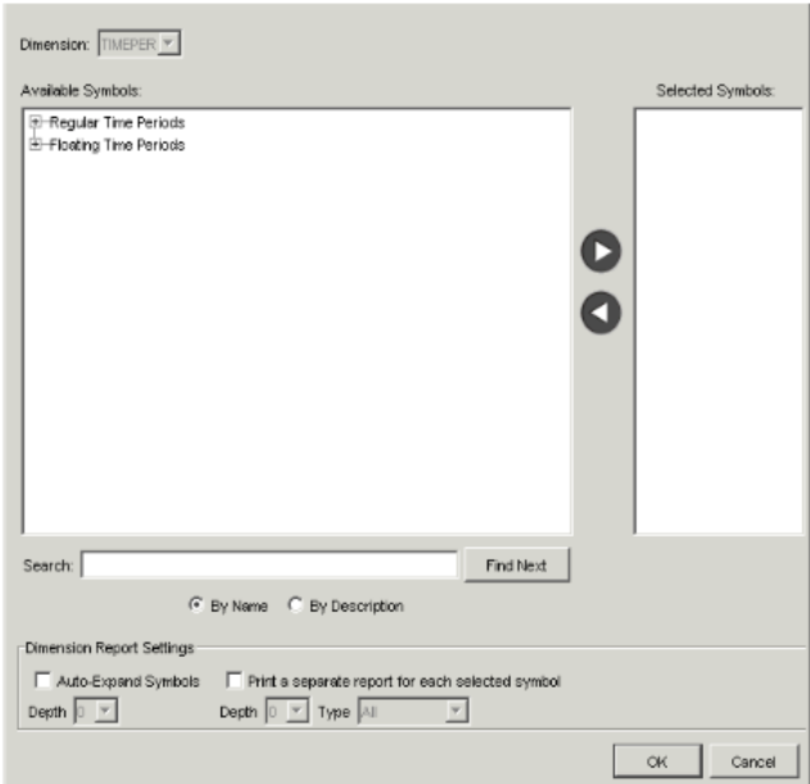
5. The **Local Files** section lists each **DataView** and report batch you have saved locally. The **Published Files** section lists report templates and report batches you have published to the database for use by other users. Published report templates and batches are listed according to the groups to which they have been published. You can change the group in the **Group** list.

   In either of these sections, select the DataView or report template you want to add, and click the right arrow button to move it to the **Current Items in Batch** field.

   > **Note:** If you intend to publish this report batch to the database, make sure you include only published reports and published batches in the report batch.

   - If, when preparing the report template, you decided to keep all dimensions frozen (to prevent users from selecting any of the symbols in the report), the report appears in the **Current Items in Batch** field. Proceed to step 12.

   - If, when preparing the report template, you decided to allow users to select symbols in any of the dimensions in the report, the Select Symbols dialog appears, showing the dimension for which, you must now select the symbols yourself. (Users are still able to change these symbols when they access the published batch.) Proceed to step 6.



6. Complete the following:

Field	Description
Available Symbols	The available root symbols for the unfrozen dimension appear in this field. When you find a symbol to use as a root symbol for that dimension, highlight it, and click the right arrow button to move it to the Selected Symbols list. (If you know the name of a symbol, you can also type the name in the text field beside the Find Next button, and then click the button.)

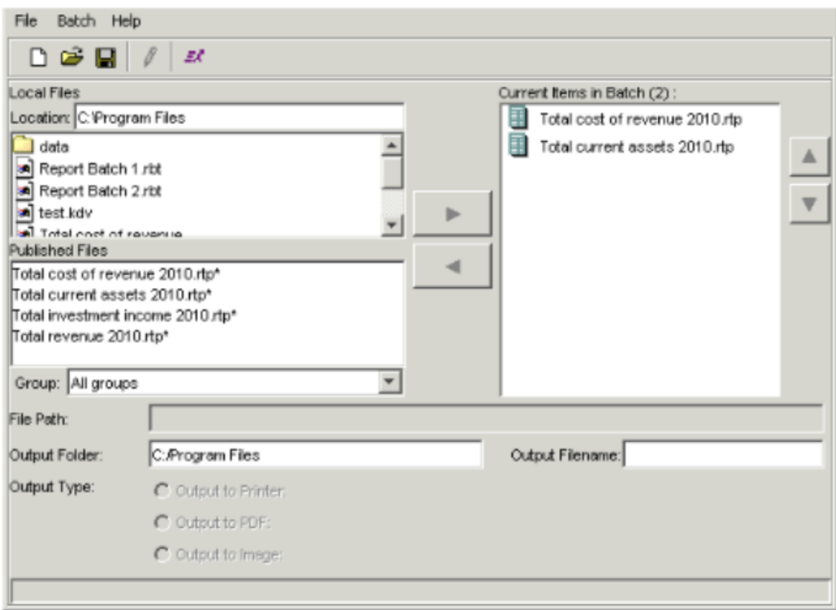
7. Repeat step 6 for each root symbol you want to include in the report for that dimension.

8. In the **Dimension Report Settings** section, complete these fields:

Field	Description
Auto-Expand Symbols	To show the child symbols of the parent symbols in the report, select this field.
Depth	Select the number of levels of child symbols you want to show in the report.
Print a separate report for each selected symbol	To print individual reports for each symbol in the Selected Symbols list and for the child symbols of those selected symbols, select this field.
Depth	Select the number of levels of symbols beneath the selected symbol, for which you want to print a separate report.

Field	Description
Type	Select one of the following: ■ All: To print individual reports for the selected symbol and all symbols within the selected symbol. ■ Parents only: To print individual reports for the selected symbol and all parent symbols within the selected symbol. ■ Leaves only: To print individual reports only for leaf symbols within the selected symbol.

9. Click OK and repeat step 6 to step 8 for each dimension for which you are prompted to select symbols. When you finish selecting symbols, the Edit Report Batch dialog appears, showing the report template in the **Current Items in Batch** field.



10. In the **Current Items in Batch** field, select the report template you have just moved there, and complete these fields:

Field	Description
Output type	Select one of the following: ■ Output to Printer: To print the report. ■ Output to PDF: To save the report with the file name extension pdf. ■ Output to Image: To save the report as an image file, with the file name extension png.

Field	Description
Output Folder	If you chose to save the report as a pdf file or png image file, type the path and folder name for the location in which you want to save the file.
Output Filename	If you chose to save the report as a pdf file or png image file, type a name for the file.

11. Repeat step 5 to step 10 for each report you want to include in the batch.

12. To remove a report from the batch, select the report in the **Current Items in Batch** field, and click the left arrow button.

13. When you have finished selecting report templates for the report batch, choose File > Save. The report batch is saved locally.

    Note: You can also publish the report batch to the database so that other users can access it. If the batch has already been published, you must publish it again.

14. Click the Close button in the top right corner to return to the Longview Analysis and Reporting dialog.

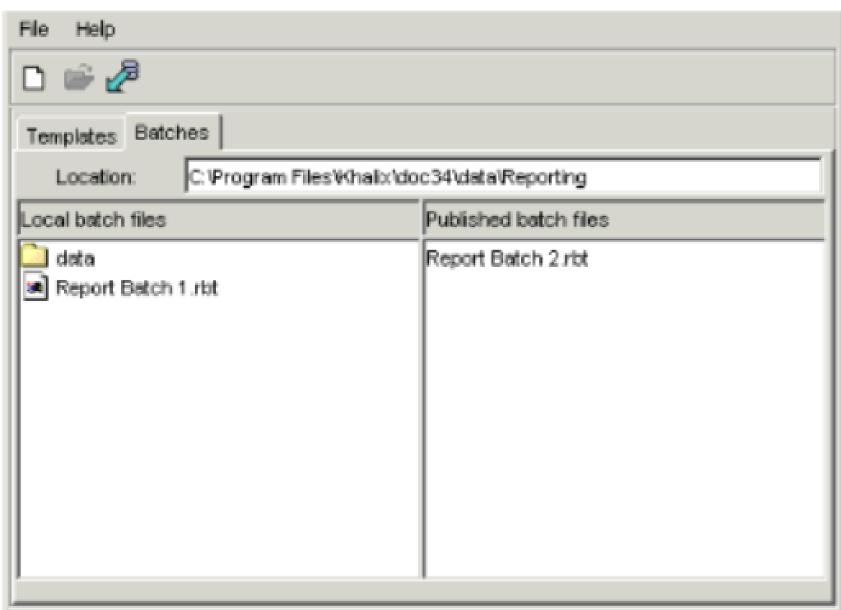
15. Proceed to Adding report batches to a report batch, or Running report batches.

Report Authors and Users

To add a report to a report batch, follow these steps.

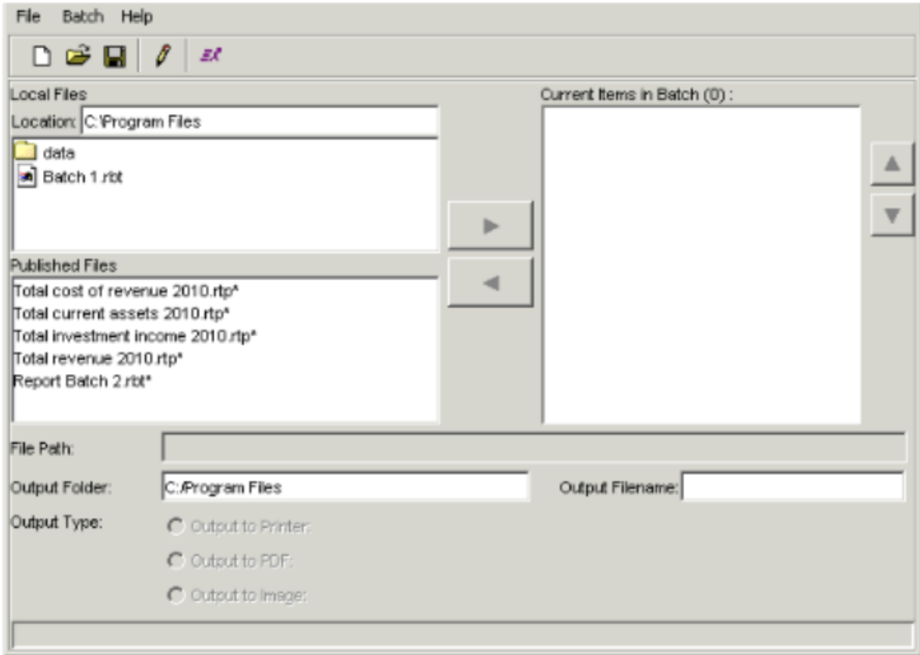
1. Create the report batch, as described in Creating a report batch.

2. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



3. The **Local batch files** section lists report batches you have saved locally. The **Published batch files** section lists report batches the Report Publisher has published to the database. In either section, select the report batch to which you want to add a report, and choose File > Open. The Edit

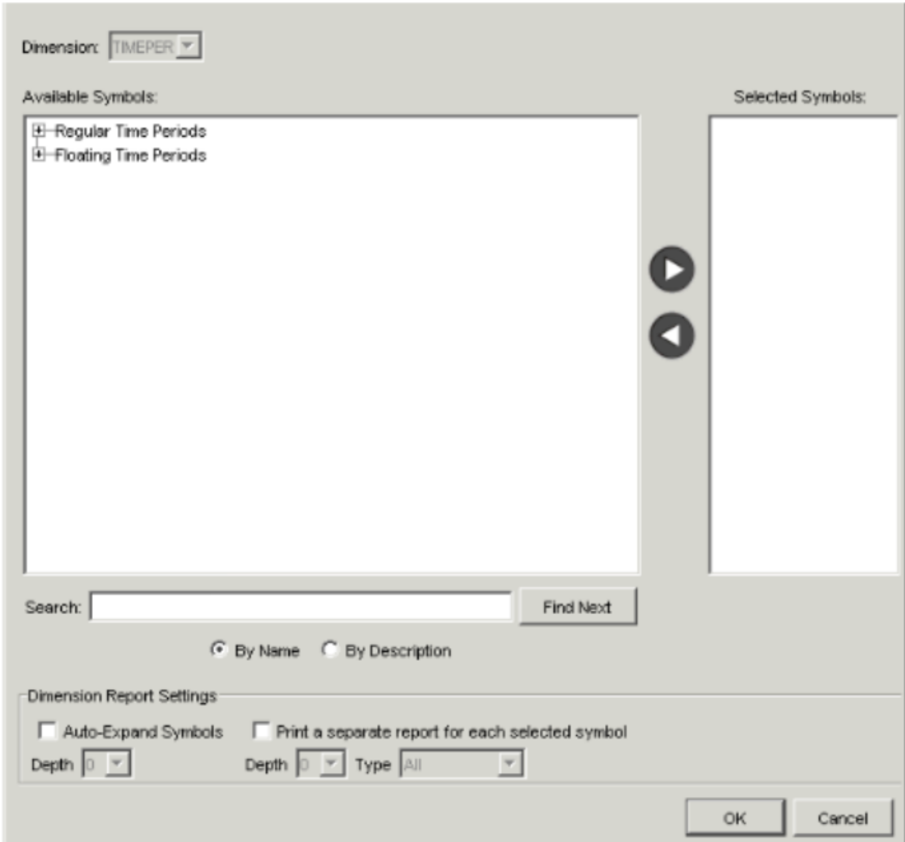
Report Batch dialog appears.



4. In the **Published Files** field, select a Report template (rtp) that you want to include in the batch, and click the right arrow button.

   - If, when preparing the report template, the Report Publisher decided to keep all dimensions frozen (to prevent users from selecting any of the symbols in your report), the report appears in the **Current Items in Batch** field. Proceed to step 9.

   - If, when preparing the report template, the Report Publisher decided to allow users to select symbols in any of the dimensions in your report, the Select Symbols dialog appears, showing the dimension for which, you can select symbols. Proceed to step 5.



5. Complete the following:

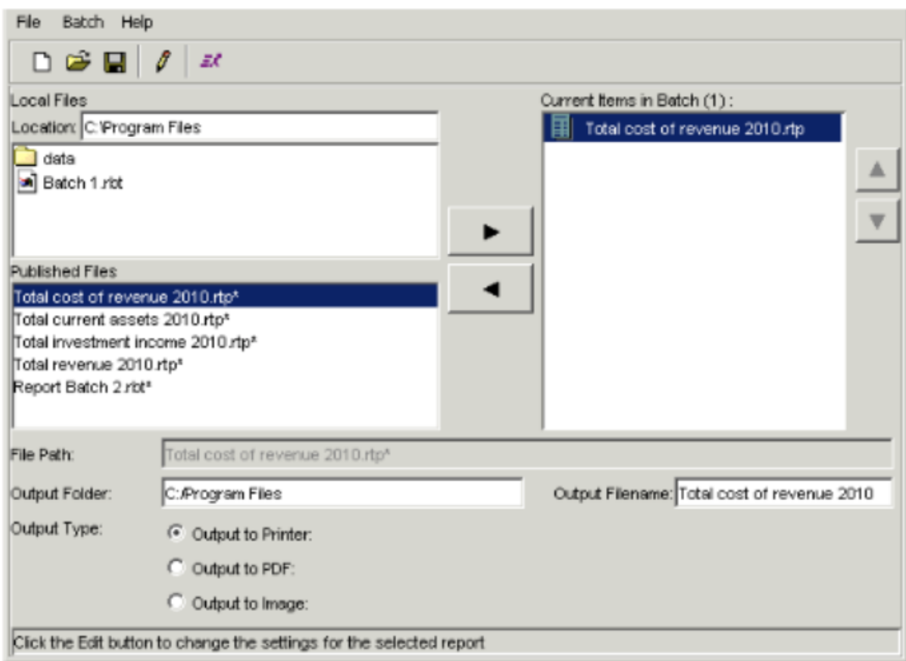
Field	Description
Available Symbols	The available root symbols for the dimension appear in this field. When you find a symbol to use as a root symbol for that dimension, make sure the symbol is highlighted, and click the right arrow button to move the symbol to the Selected Symbols list. (If you know the name of a symbol, you can also type the name in the text field beside the Find Next button, and then click the button.)

6. Repeat step 5 for each root symbol to include in the report for that dimension.
7. In the **Dimension Report Settings** section, complete these fields.

Field	Description
Auto-Expand Symbols	To show the child symbols of the parent symbols in the report, select this field.
Depth	Select the number of levels of child symbols you want to show in the report.
Print a separate report for each selected symbol	To print individual reports for each symbol in the Selected Symbols list and for the child symbols of those selected symbols, select this field.

Field	Description
Depth	Select the number of levels of symbols beneath the selected symbol, for which you want to print a separate report.
Type	Select one of the following: ■ All: To print individual reports for the selected symbol and all symbols within the selected symbol. ■ Parents only: To print individual reports for the selected symbol and all parent symbols within the selected symbol. ■ Leaves only: To print individual reports only for leaf symbols within the selected symbol.

8. Click OK and repeat step 5 to step 7 for each dimension for which you are prompted to select symbols. When you finish selecting symbols, the Edit Report Batch dialog appears, showing the report in the **Current Items in Batch** field.



9. In the Current Items in Batch field, select the report, and complete these fields:

Field	Description
Output type	Select one of the following: ▪ Output to Printer: To print the report. ▪ Output to PDF: To save the report with the file name extension pdf. ▪ Output to Image: To save the report as an image file, with the file name extension png.
Output Folder	If you chose to save the report as a pdf file or png image file, type the path and folder name for the location in which you want to save the file.
Output Filename	If you chose to save the report as a pdf file or png image file, type a name for the file.

10. In the Current Items in Batch field, select the report, and complete these fields:
11. Repeat step 4 to step 9 for each report you want to include in the batch.
12. To delete a report from the batch, select the report in the **Current Items in Batch** field, and click the left arrow button.
13. When you have finished selecting report templates, choose File > Save. The batch is saved locally.
14. Click the Close button in the top right corner to return to the Longview Analysis and Reporting dialog.
15. Proceed to Adding report batches to a report batch, or Running report batches.

Adding report batches to a report batch

After the report batch has been created, you can add reports to it. You can also add other batches to it.

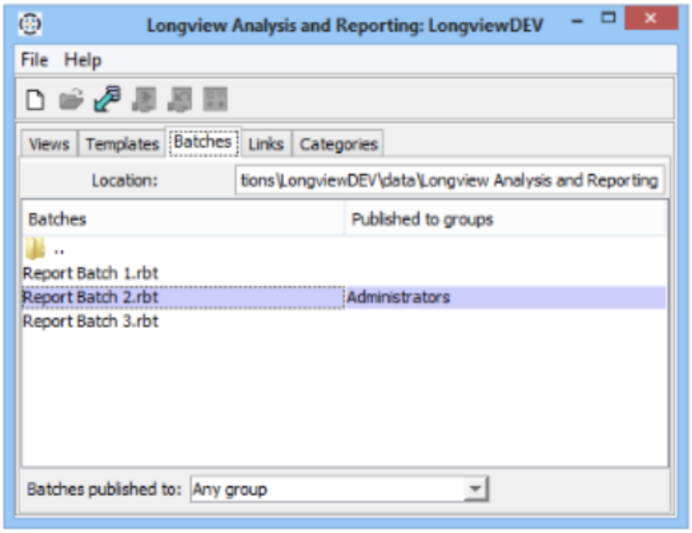
Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report Users	yes

The procedure you use differs depending on your role.

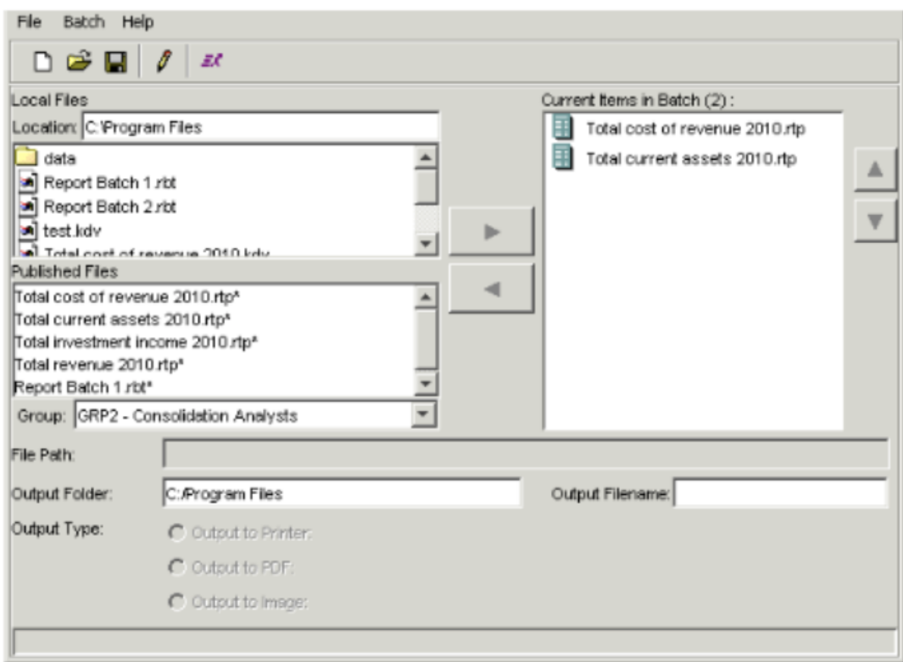
Report Publishers

To add a report batch to a report batch, follow these steps.

1. Create the report batch, as described in Creating a report batch.
2. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



3. If you want to add a report batch to a report batch that you have published to the database, select the group to which you published it in the **Templates published** to drop-down list. A list of report batches published to that group appears. For a list of all report batches, select **Any group**.
4. Select the report batch to which you want to add a batch and choose File >Open. The Edit Report Batch dialog appears.



5. The Local Files section lists each DataView and report batch you have saved locally. The Published Files section lists each report template and report batch you have published to the database for use by other users. Published report templates and batches are listed according to the groups to which

they have been published. You can change the group in the **Group** list.

In either of these sections, select the batch you want to add, and click the right arrow button to move it to the **Current Items in Batch** field.

> **Note:** If you intend to publish this report batch to the database, make sure you include only published report templates and published batches in the report batch.

6. Repeat step 5 for each batch you want to add to the report batch.
7. To remove a batch from the report batch, select the report in the **Current Items in Batch** field, and click the left arrow button.
8. When you have finished selecting report batches for the report batch, choose File > Save. The report batch is saved locally.

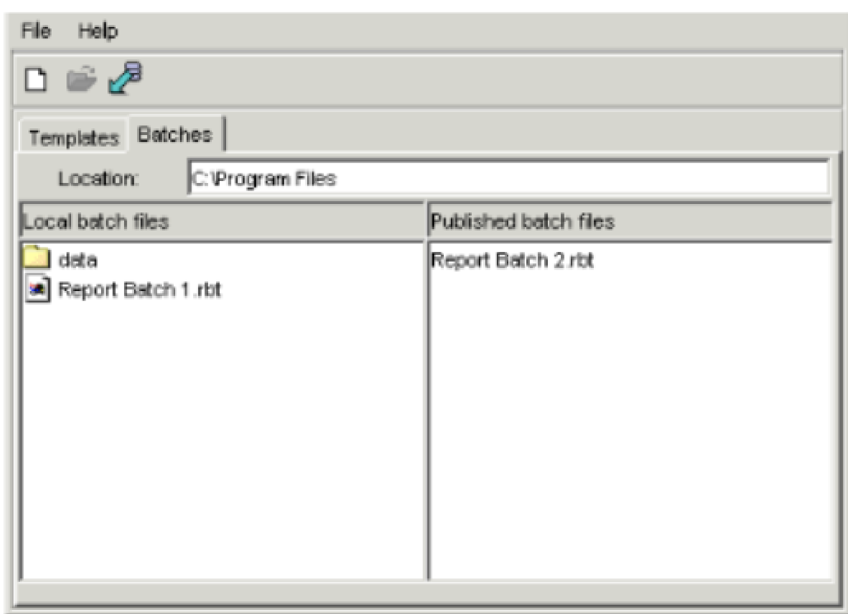
> **Note:** You can also publish the report batch to the database so that other users can access it. Furthermore, if the batch has already been published, saving your changes does not update the published version of the report batch.

9. Click the Close button in the top right corner to return to the Longview Analysis and Reporting dialog.
10. Proceed to Adding report templates to a report batch, or Running report batches.

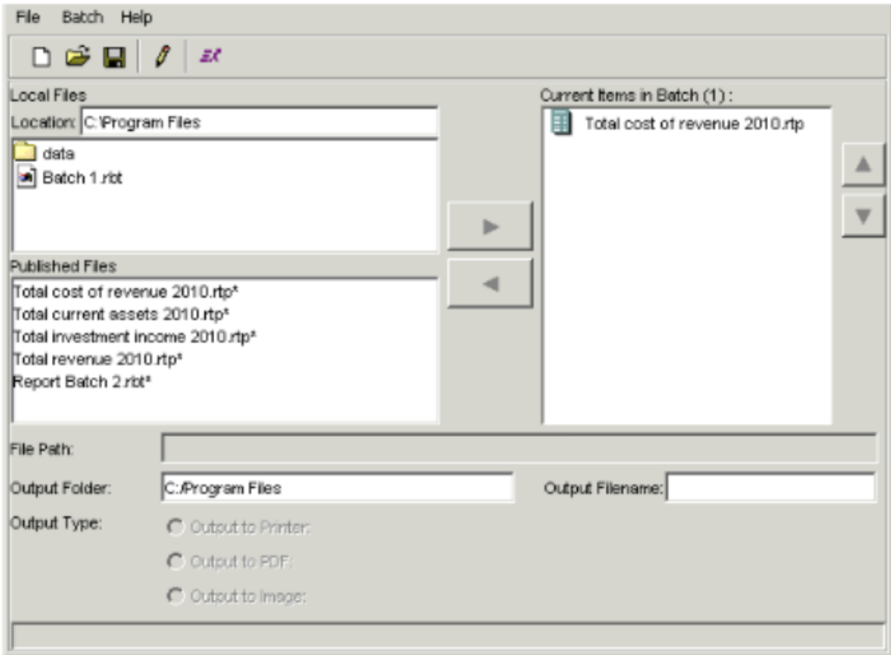
Report Authors and Users

To add a report batch to a report batch, follow these steps.

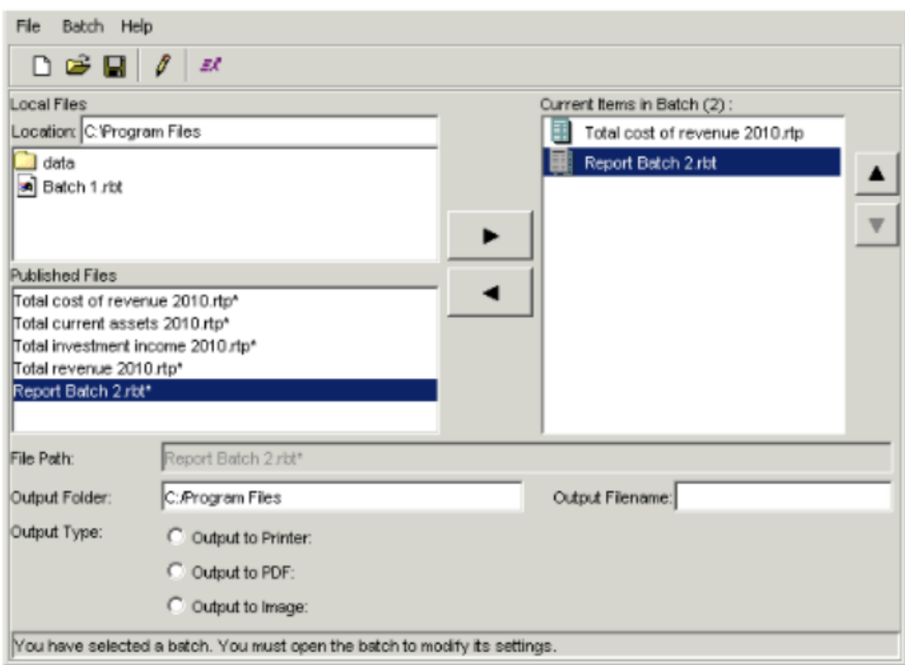
1. Create the report batch, as described in Creating a report batch.
2. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



3. The **Local batch files** section lists the report batches you have saved locally. The **Published batch files** section lists the report batches the Report Publisher has published to the database. Select the report batch to which you want to add a batch and choose File > Open. The Edit Report Batch dialog appears.



4. The **Local Files** section lists batches you have saved locally. The **Published Files** section lists report templates and report batches the Report Publisher has published to the database. In either of these sections, select the batch you want to add, and click the right arrow button to move the batch to the **Current Items in Batch** field.



5. Repeat step 4 for each batch you want to add to the report batch.
6. To remove a batch from the report batch, select the batch in the Current Items in Batch field, and click the left arrow button.
7. When you have finished preparing the batch, choose File > Save. The report batch is saved locally.
8. Close the Edit Report Batch dialog. The Longview Analysis and Reporting dialog appears.
9. Proceed to Adding report templates to a report batch, or Running report batches.

Opening report batches

You may want to edit the content and settings of your report batches from time to time. To do so, you must open the batch file you want to edit.

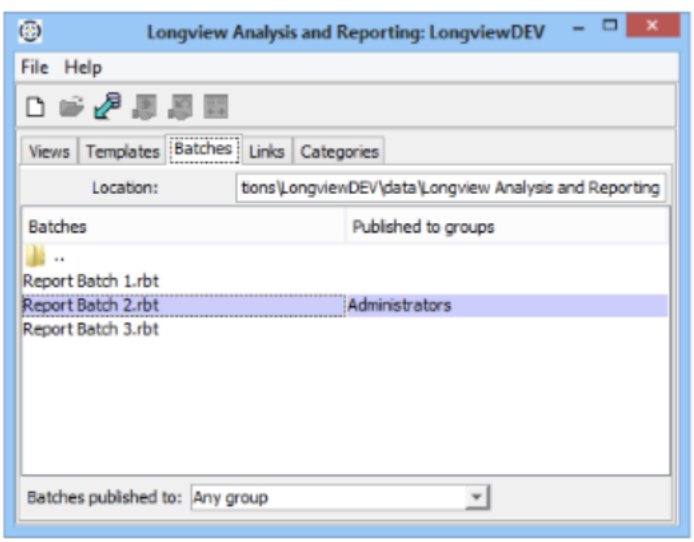
Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report Users	yes

The procedure you use differs depending on your role.

Report Publishers

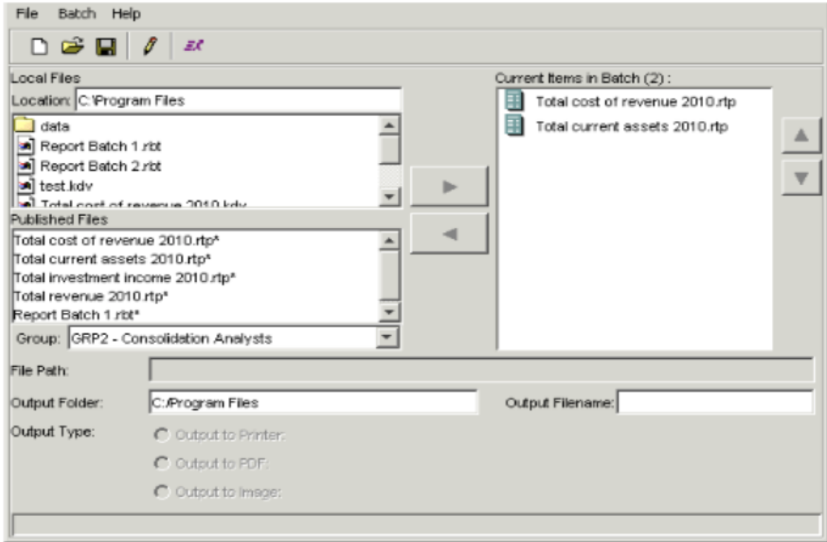
To open a report batch, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



2. If you want to open a report batch that you have published to the database, select the group to which you published it in the **Templates published to** drop-down list. A list of report batches published to that group appears. For a list of all report batches, select **Any group**.

3. Select the batch you want to edit and choose File > Open. The Edit Report Batch dialog appears.

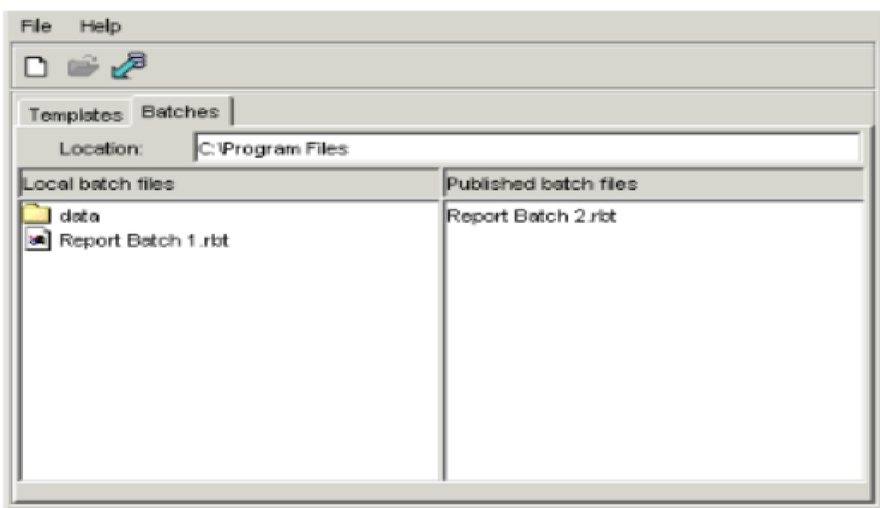


4. Make changes to the batch as described in Creating report batches.

Report Authors and Users

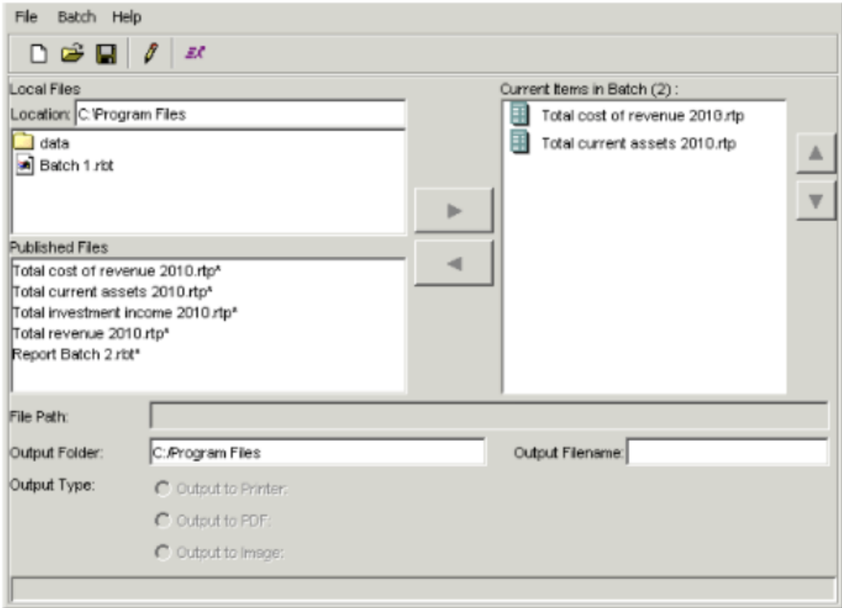
To open a report batch, follow these steps.

1. Open the Longview Analysis and Reporting dialog, click the **Batches** tab.



2. To view the most current list of published batches, make sure none of the report batches are selected (if any template is selected, you can clear it by holding down the Ctrl key and clicking it), and choose Tools > Refresh.

3. Select the batch you want to edit and choose File > Open. The Edit Report Batch dialog appears.



4. Make changes to the report batch as described in Creating report batches.

Refreshing report batches

Depending on your role, you may be able to use the refresh feature to restore the content of batches with the most recently published version of those files.

Refreshing a local batch

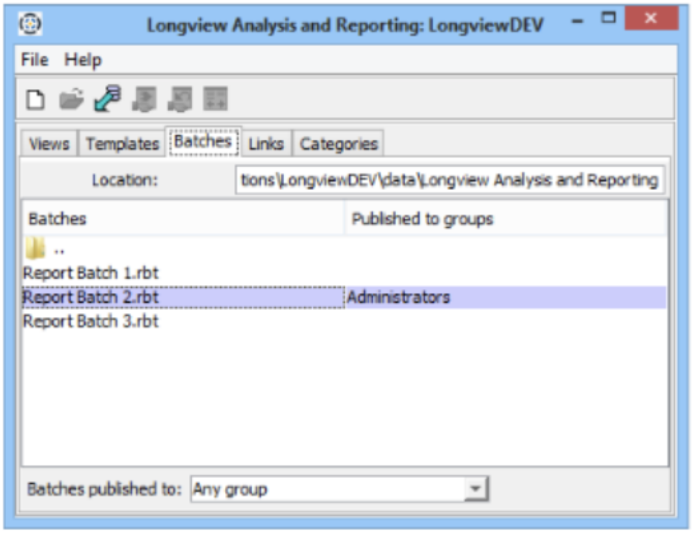
You may be able to use the refresh feature to restore the content of a local report batch with the most recently published version of those files.

Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report Users	no

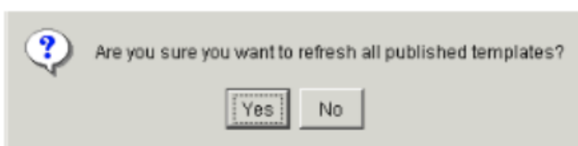
For example, let’s say you publish a report batch to the database, and then make changes to your local copy. If you decide at a later time that you do not want to publish those changes, you may want to make your local copy match the published one on the database.

To restore the content of your local report batch, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



2. For **Templates published to** select the group to which you published the report batch, the local version of which you want to restore. A list of report batches published to that group appears. For a list of all report batches, select **Any group**.
3. Do one of the following:
   - To restore all local report batches that have been published, make sure none of the report batches in the list is selected (if any report batch is selected, you can clear it by holding down the Ctrl key and clicking it), and choose Tools > Refresh. A confirmation dialog appears.

     Click Yes. The local versions of all published report batches are restored to show the content of the published versions.

   - To restore a single local report batch, select it in the list and choose Tools > Refresh. The local version of the report batch is restored to show the content of the published version.

     Click Yes. The local versions of all published report batches are restored to show the content of the published versions.

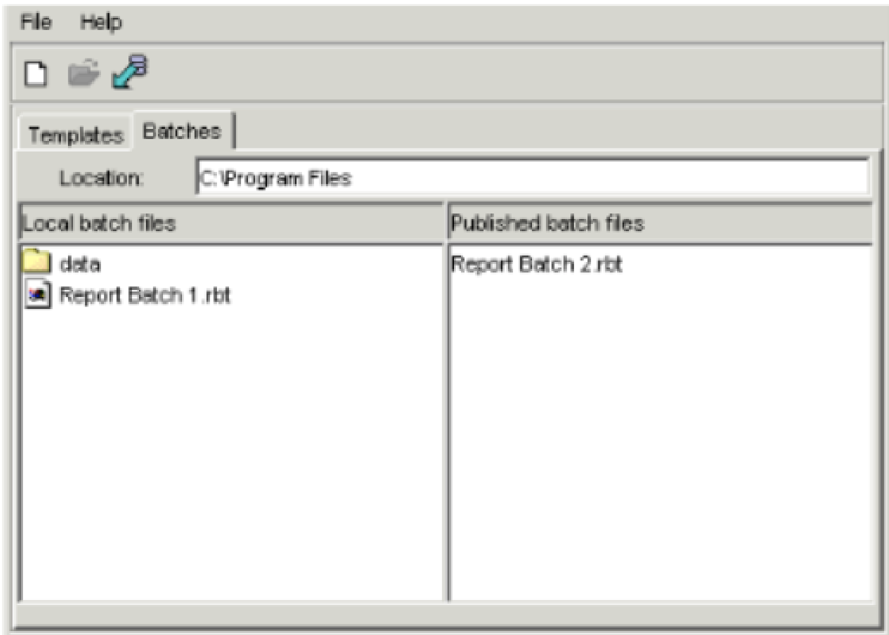
Refreshing a published batch

You may be able to use the refresh feature to refresh the content of batches published to your group with the most recently published versions.

Role	Can perform this task?
Report Publisher	no
Report Author	yes
Report Users	yes

To refresh the content of a published report batch, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



2. Do one of the following:
   - To refresh all published report batches, make sure none of the report batches in the list is selected (if any file is selected, you can clear it by holding down the Ctrl key and clicking it), and choose Tools > Refresh.
   - To refresh a single published report batch, select it in the list and choose Too ls > Refresh. The report batch is refreshed.

Running report batches

A report batch runs a collection of reports at one time, rather than individually. For more information on creating a report batch, see Creating report batches.

Previewing and changing symbols in a report batch

Before you run a batch, you can preview the symbol content of the reports within that batch. Depending on how the reports were prepared, you may be able to change the symbols as well.

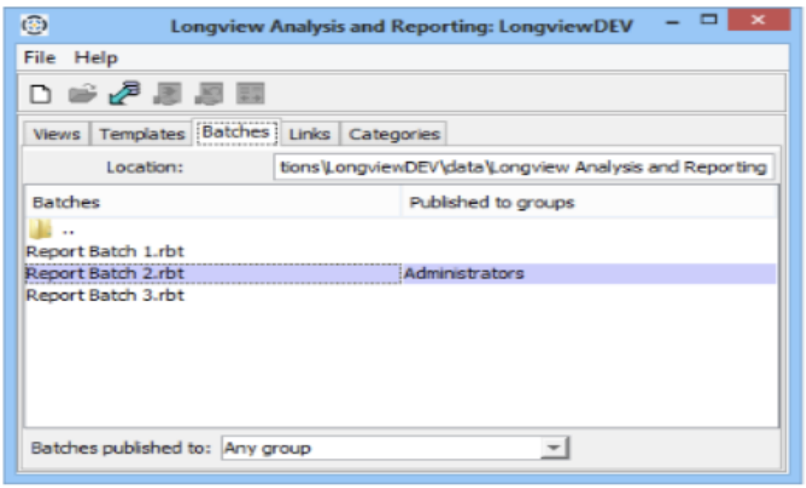
Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report Users	yes

The procedure you use differs depending on your role.

Report Publishers

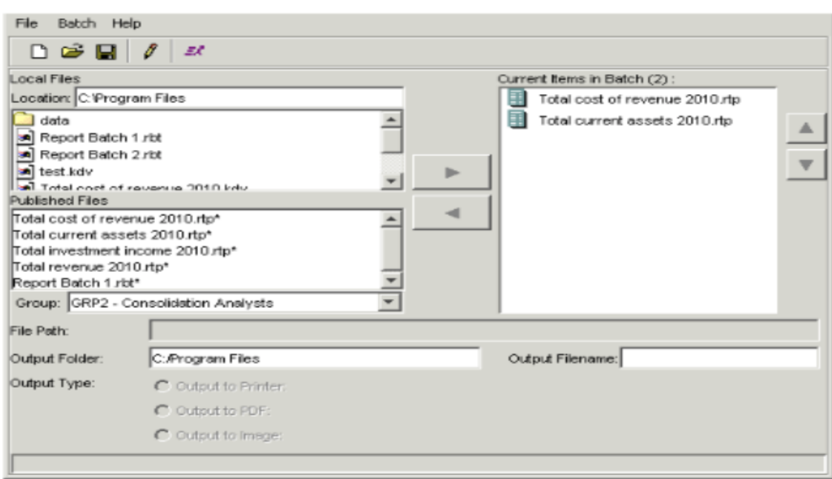
To preview the symbol contents of the reports in your report batch, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.

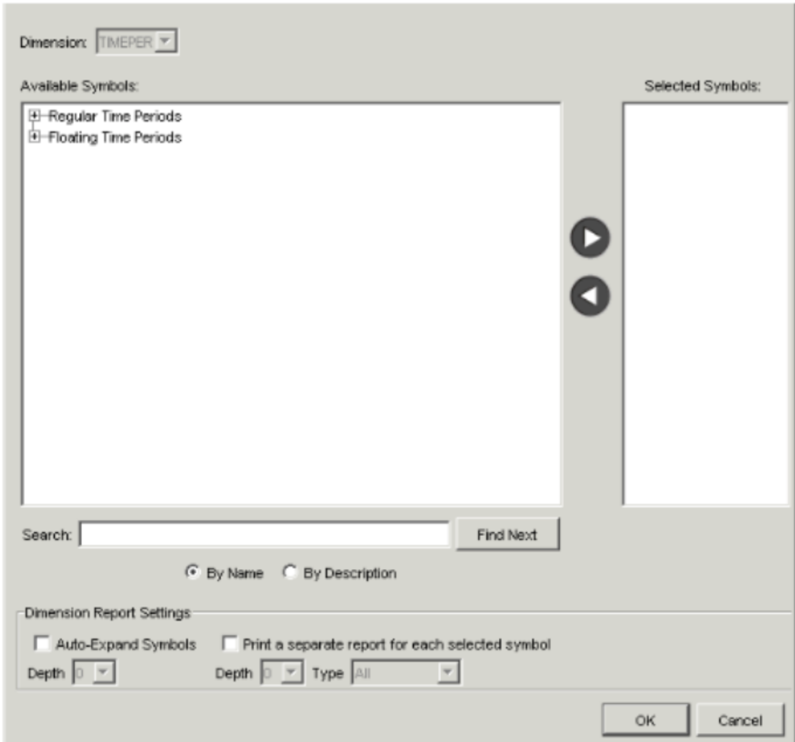


2. If you want to preview the symbols in a report batch that you have published to the database, select the group to which you published it in the **Templates**published to drop-down list. A list of report batches published to that group appears. For a list of all report batches, select **Any group**.

3. Select the batch whose symbol content you want to preview and choose File >Open. The Edit Report Batch dialog appears.



4. To view the symbol content of a particular report within the batch, select that report in the **Current Items in Batch** field, and click the Edit Report Settings icon in the toolbar. The Select Symbols dialog appears.



5. For Dimension, select the dimension whose symbols you want to view or change. The symbols for that dimension appear in the **Selected Symbols** list.

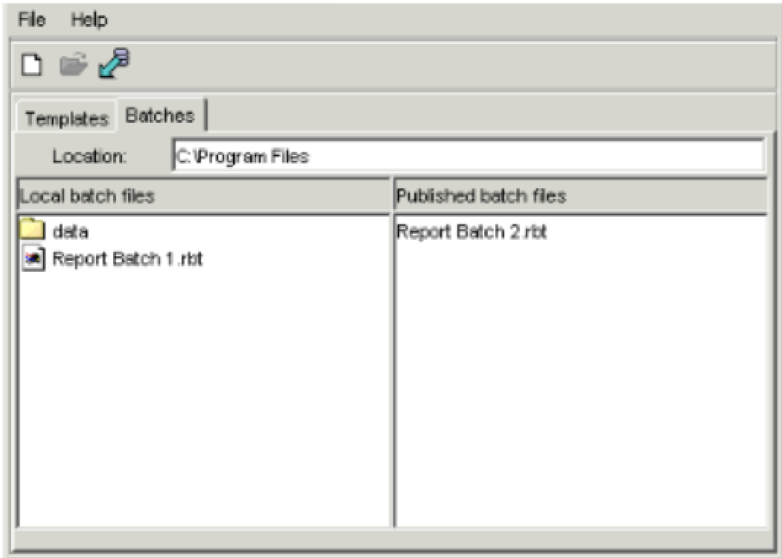
> **Note:** Some buttons and fields may be unavailable. If so, you can only view the symbols in that dimension of the report.

6. For Dimension, select the dimension whose symbols you want to view or change. The symbols for that dimension appear in the Selected Symbols list.
7. Depending on how you prepared the report ***template***, you may be able to change its symbols. To do so, complete step 6 to step 8 in Report Publishers.
8. When you are finished, click OK. The Edit Report Batch dialog appears.
9. Repeat step 4 to step 7 for each report in the batch whose symbols you want to preview.
10. When you are finished previewing the symbol content of the reports in the batch, click the Close button in the top right corner. The Longview Analysis and Reporting dialog appears.
11. You can proceed to Running a report batch.

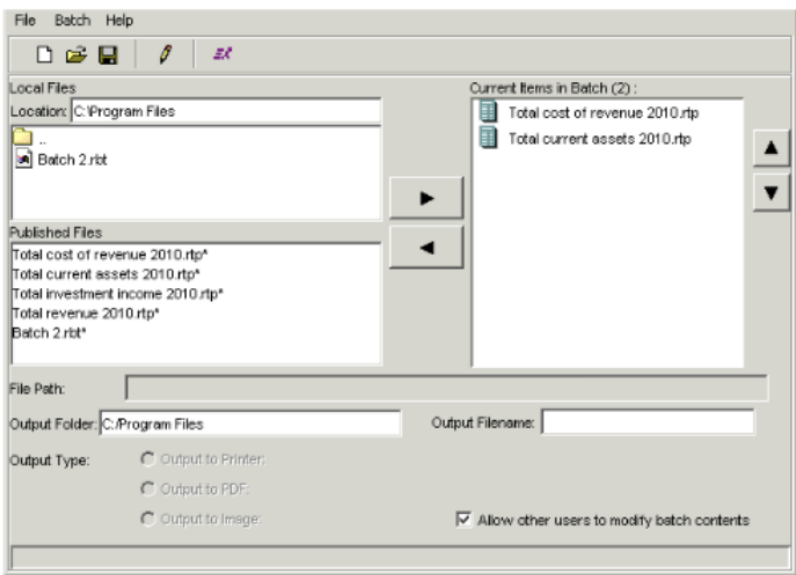
Report Authors and Users

To preview the symbol contents of the reports in your report batch, follow these steps.

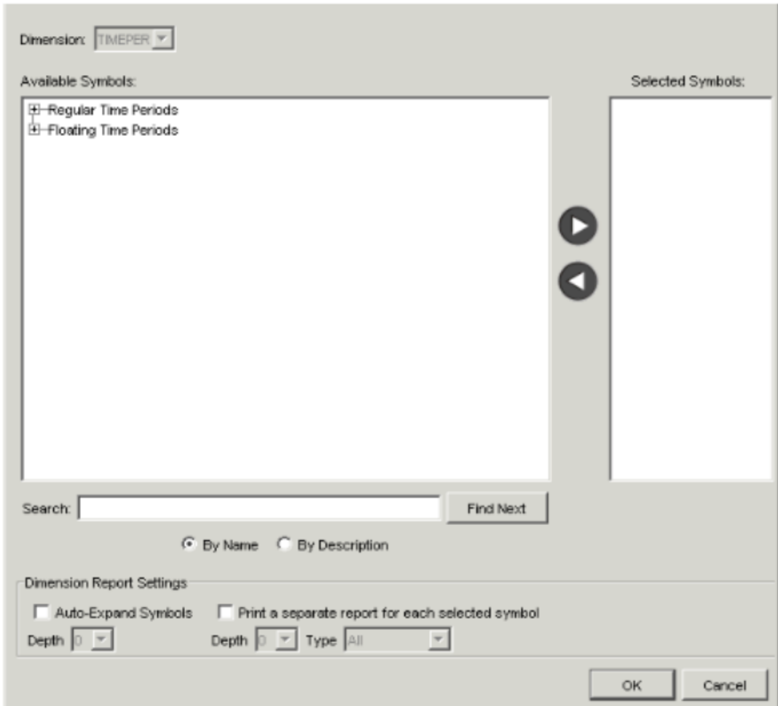
1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



2. Select the batch whose symbol content you want to preview and choose File >Open. The Edit Report Batch dialog appears.



3. To view the symbol content of a particular report template within the batch, select that report in the **Current Items in Batch** field, and click the Edit Report Settings icon in the toolbar. The Select Symbols dialog appears.



4. For **Dimension**, select the dimension whose symbols you want to view or change. The symbols for that dimension appear in the **Selected Symbols** list.

   > **Note:** Some buttons and fields may be dimmed. If so, you can only view the symbols in that dimension of the report.

5. Depending on how the Report Publisher prepared the report template, you may be able to change its symbols. To do so, complete step 5 to step 7 in Report Authors and Users.

6. When you are finished, click OK. The Edit Report Batch dialog appears.

7. Repeat step 3 to step 6 for each report in the batch whose symbols you want to preview.

8. When you are finished, click the Close button in the top right corner. The Longview Analysis and Reporting dialog appears. You can proceed to Running a report batch.

Running a report batch

A report batch runs a collection of reports at one time, rather than individually. For more information on creating a report batch, see Creating report batches.

Once you have prepared your report batch, you can run it. Before you do, make sure you have completed the steps in Previewing and changing symbols in a report batch.

Role	Can perform this task?
Report Publisher	yes

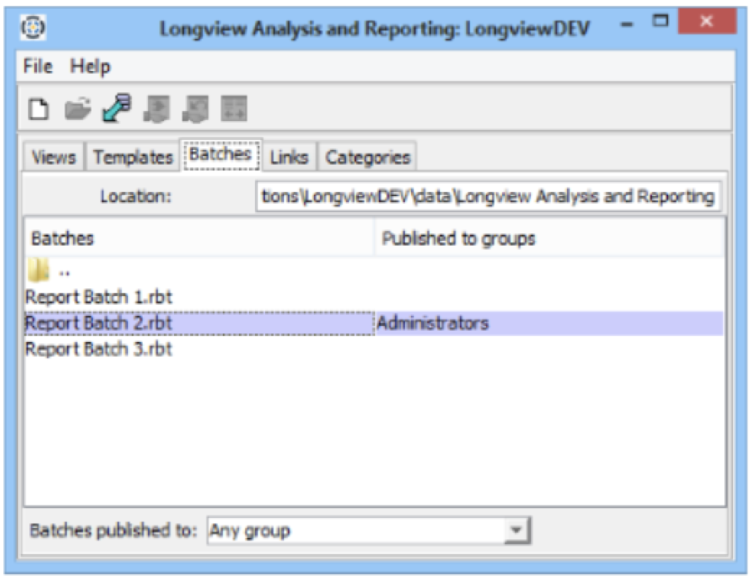
Role	Can perform this task?
Report Author	yes
Report Users	yes

The procedure you use differs depending on your role.

Report Publishers

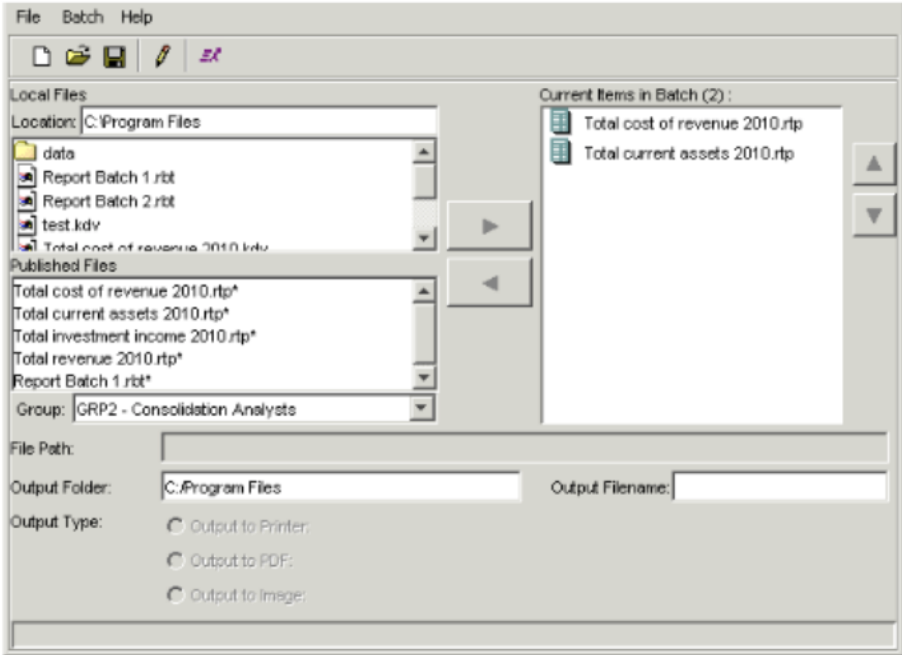
To run a report batch, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.

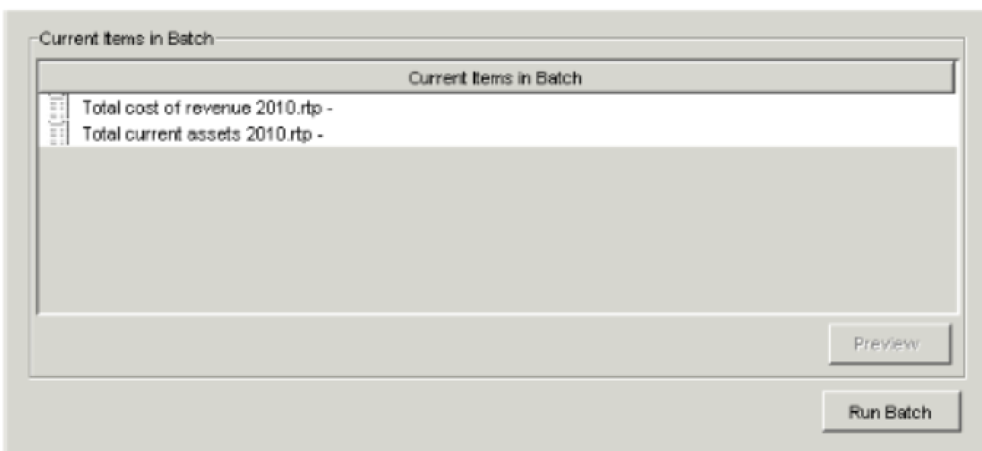


2. If you want to run a report batch that you have published to the database, select the group to which you published it in the **Templates published to** drop-down list. A list of report batches published to that group appears. For a list of all report batches, select **Any group**.

3. Select the batch you want to run and choose File > Open. The Edit Report Batch dialog appears.

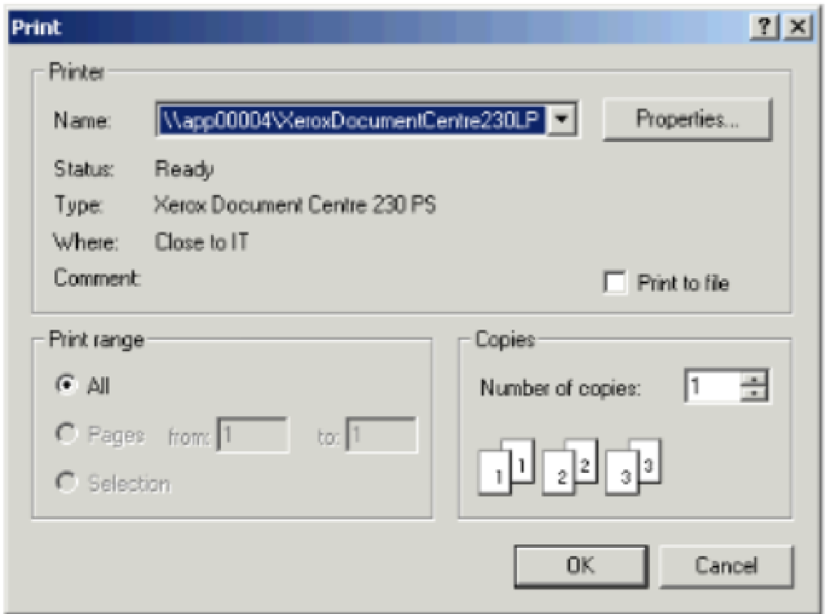


4. Choose Batch > Run Batch. The Run Report Batch dialog appears, listing the reports and batches in the report batch.

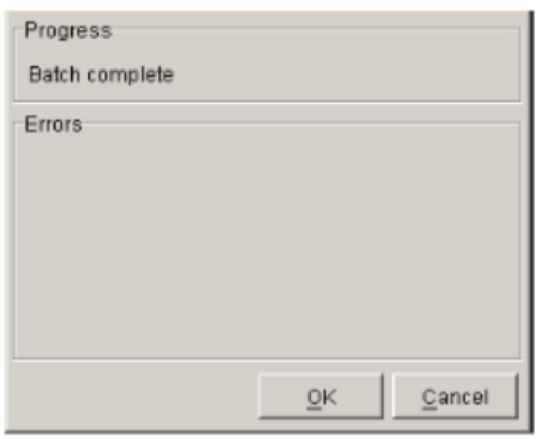


5. To preview a report, select it and click Preview.
   The Report View appears, displaying the report you selected. To close the report, click the Close button in the top right corner. The Run Report Batch dialog reappears.

6. To run the batch, click Run Batch. If any of the reports are printed, the Print dialog appears.



7. Specify your print options as required and click OK. The Batch Status dialog appears, listing any errors that may have occurred.



8. When the batch is complete, click OK. The Run Report Batch dialog appears.

9. Click the Close button in the top right corner to close the dialog.

Report Authors and Users

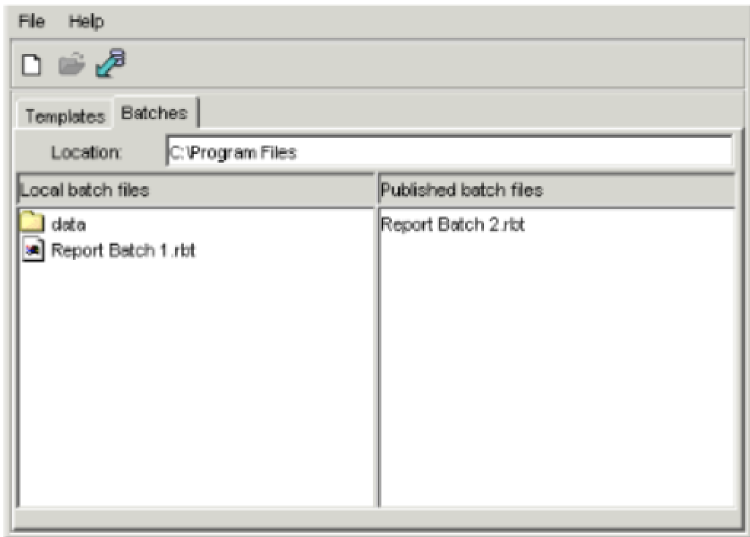
When users run a batch published to their group that contains a report that was not published to their group, that report does not run, but the rest of the batch runs normally.

> **Note:** This assumes that V3 compatibility mode is in effect for your system. Contact your System Administrator for more information.

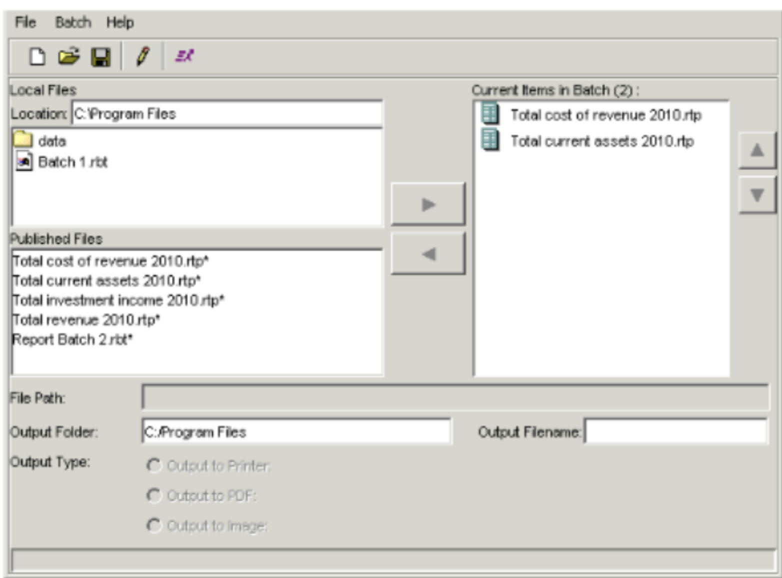
Even if a user belongs to more than one group, he or she is signed on to only one group at a time, and therefore is limited to running reports published to the currently active group.

To run a report batch, follow these steps.

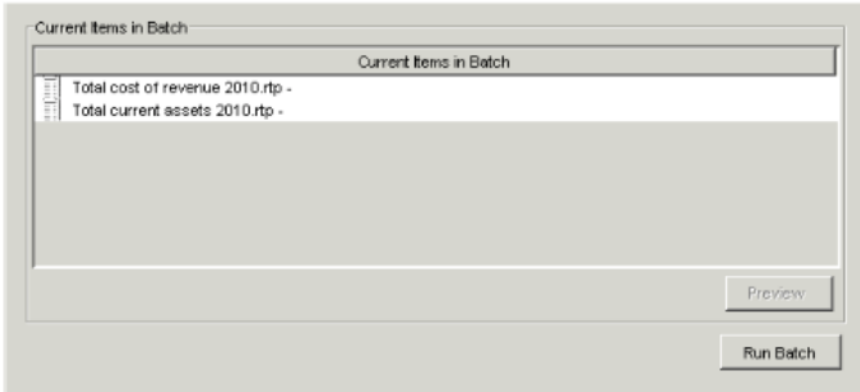
1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.



2. Select the batch you want to run and choose File > Open. The Edit Report Batch dialog appears.



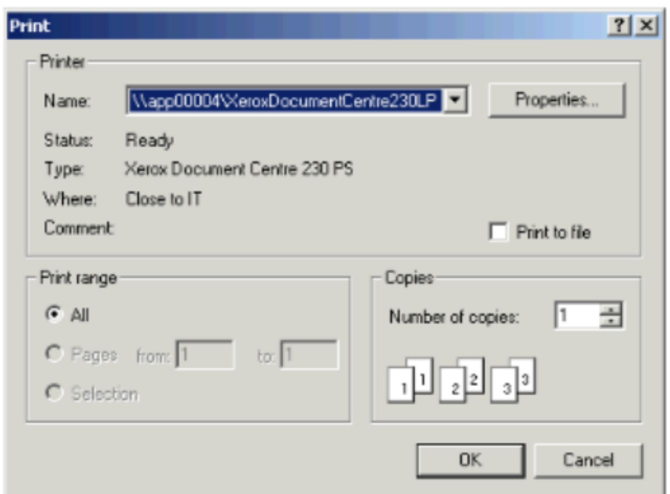
3. Choose Batch > Run Batch. The Run Report Batch dialog appears, listing the reports and batches in the report batch.



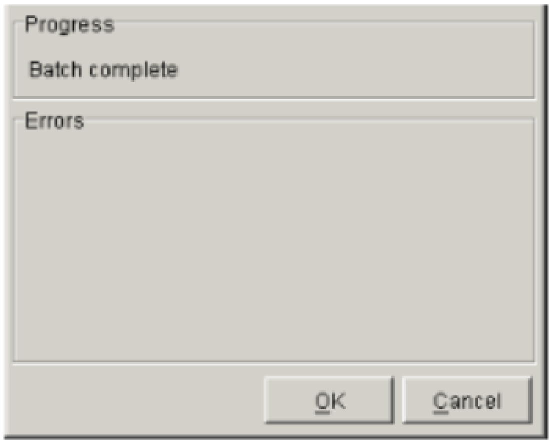
4. To preview a report, select it and click Preview. The Report View appears, displaying the report you selected.

5. To close the report, click the Close button in the top right corner. The Run Report Batch dialog reappears.

6. To run the batch, click Run Batch. If any of the reports are printed, the Print dialog appears.



7. Specify your print options as required and click OK. The Batch Status dialog appears, listing any errors that may have occurred.



8. When the batch is complete, click OK. The Run Report Batch dialog appears.
9. Click the Close button in the top right corner to close the dialog.

Deleting report batches

If you no longer need a report batch, you may be able to delete it.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes, but local report batches only. You cannot delete published report batches.
Report Users	yes, but local report batches only. You cannot delete published report batches.

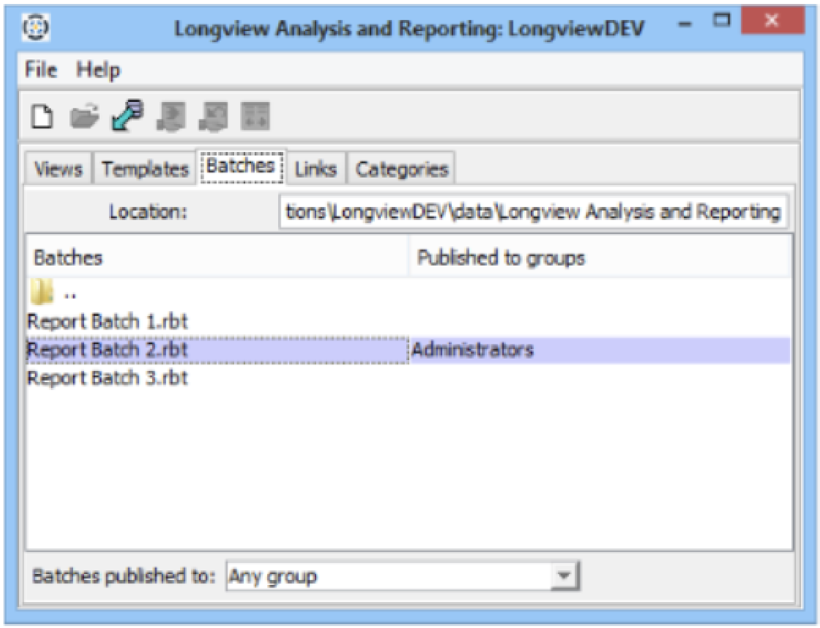
Caution: If you follow this procedure, you cannot reverse your decision. Use with caution.

The procedure you use differs depending on your role.

Report Publishers

To delete a report batch, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the Batches tab.



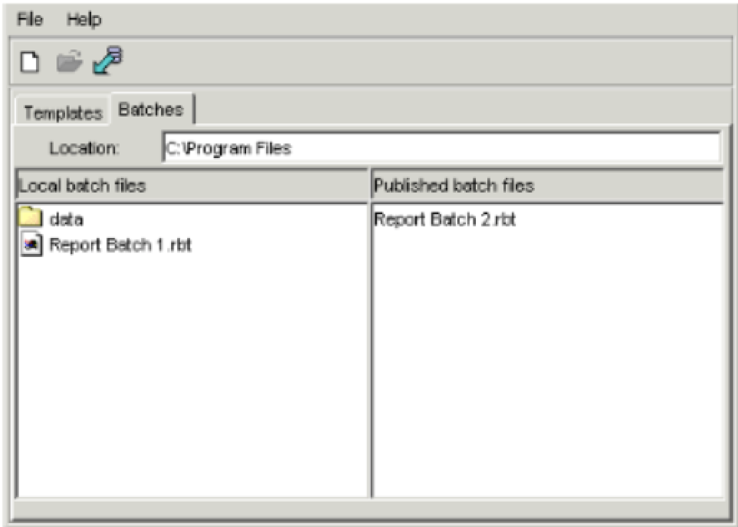
2. If you want to delete a report batch that you have published to the database, select the group to which you published it in the **Templates published to** drop-down list. A list of report batches published to that group appears. For a list of all report batches, select **Any group**.
3. For Location, select the folder containing the report batch you want to delete, if necessary.
4. Select the batch you want to delete.
5. Press the Delete key. A confirmation dialog appears.
6. Click Yes. The application deletes the report batch.

Note: When you delete a report batch that has been published to the database, you delete the local version of that report batch only. The published version still exists on the database.

Report Authors and Users

To delete a report batch, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the Batches tab.



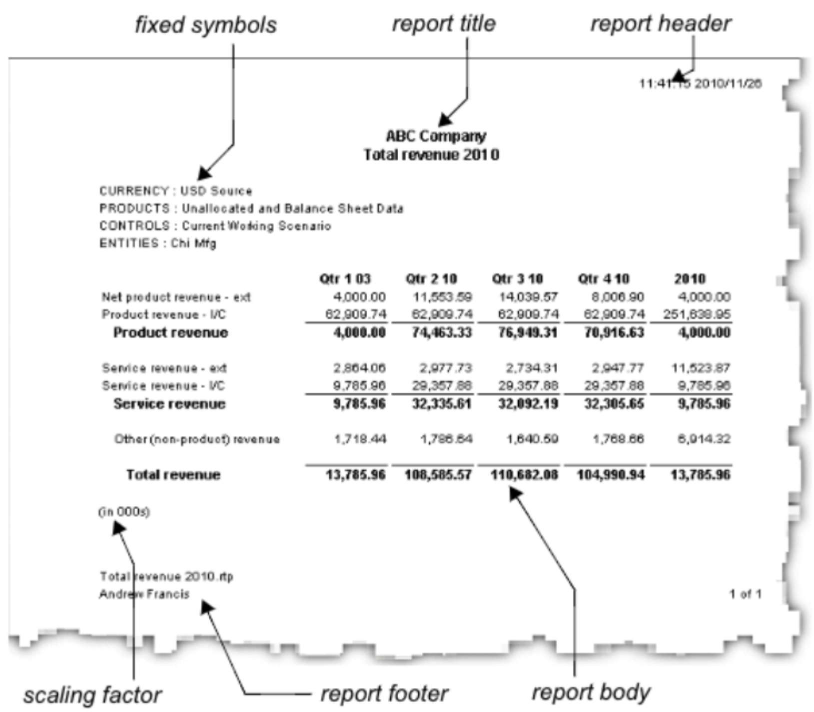
2. For **Location**, select the folder containing the report batch you want to delete, if necessary.
3. In the **Local batch files** list, select the report batch you want to delete.
4. Press the Delete key. A confirmation dialog appears.
5. Click Yes. The application deletes the report batch.

Designing Reports

No matter what your role in Longview Analysis and Reporting and Longview Input, you can view templates, DataViews, and input views in report format.

Understanding reports and their features

The following illustration shows a report with its main features.



A report consists of the following features:

Feature	Description
title	The title provides a brief description of the report’s contents.
header	The header provides additional report information, such as the date and time the report was created.
body	The body of the report consists of the data. You can specify the font for data displayed. Also, you can choose to either include or omit fixed symbols in the report.
footer	The footer provides additional report information, such as page numbering.
column formats	You can change the column heading

Feature	Description
row formats	You can change the row heading formats as well as the row heading widths in a report.
print order	You can specify the order in which the pages of a report are printed – either side to side, or top to bottom.

Viewing files in report format

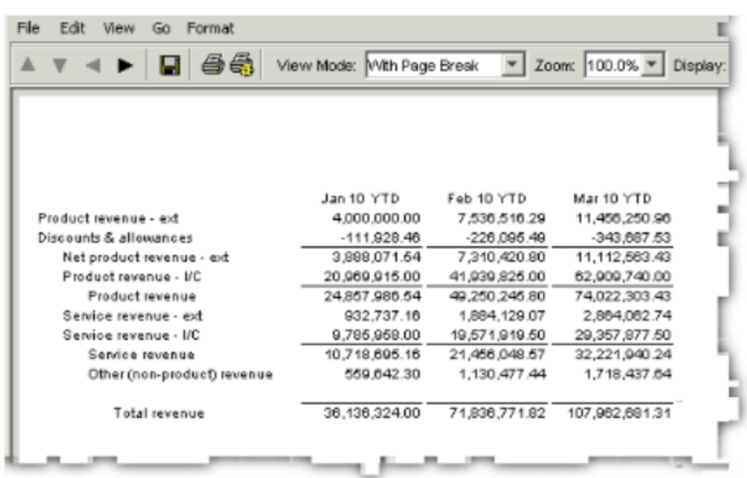
No matter what your role in Longview Analysis and Reporting and Longview Input, you can view templates, DataViews, and input views in report format.

However, the way in which you access the report view may differ according to your role.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	no. However, when you open a published report template, it automatically appears in report format. You can ignore the rest of this section.

To view a file in report format, follow these steps.

1. Open the file you want to view in report format.
2. In the template, DataView, or input view, choose View > Report. The report view appears, showing your file in report format. (If you are an Input Publisher, the data appears as blanks only.)

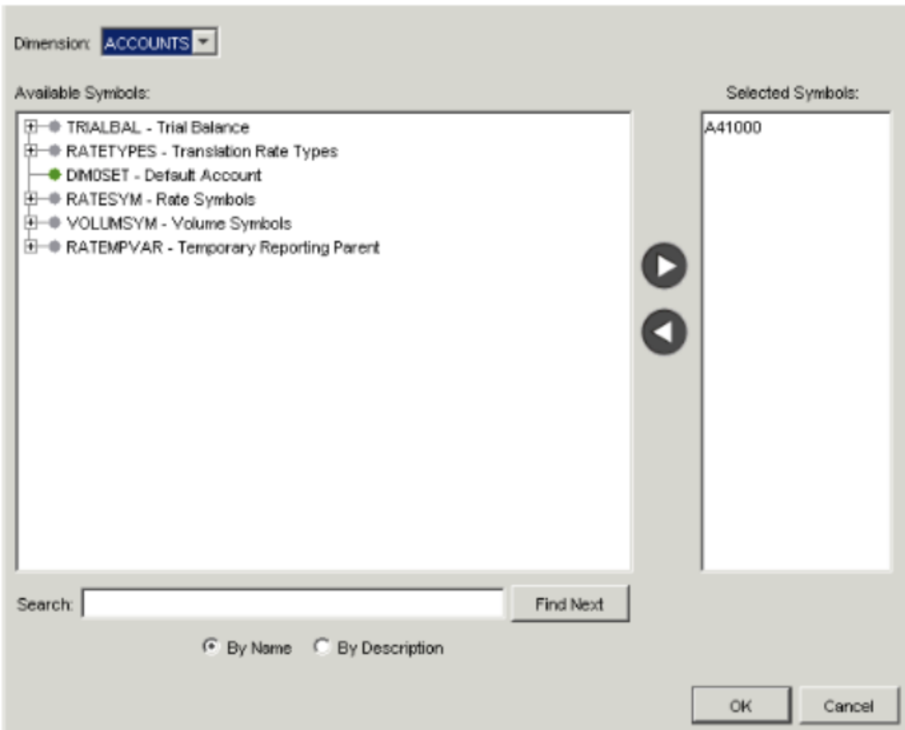


Selecting new symbols for reports

Depending on your role and the properties of the file on which the report is based, you may be able to change the symbols that appear in a report.

To change the symbols in a report, follow these steps.

1. In the report view, choose Format > Choose Symbols. The Symbol Selections dialog may appear, or you may have to select other dimensions first. (Alternatively, you can right-click on a symbol name or description, and in the menu that appears, choose **Choose Symbols**. The Symbol Selection dialog appears, showing the dimension you chose.)



2. Select symbols, as required.
3. When you are finished selecting your symbols, click OK. The report view appears showing the symbols you selected.

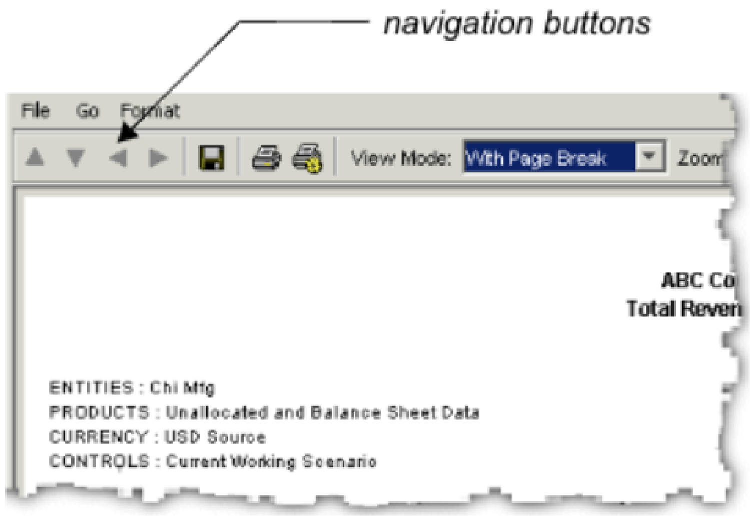
Navigating reports

You can use various features within the report to navigate and configure your reports.

Navigating through the pages of a report

The reports you open may contain many pages. If so, you can easily navigate through these pages using the navigation buttons in the report toolbar.

Note: A report contains more than one page only if you selected the With Page Breaks view mode. Otherwise, the report contains one page only, and the navigation buttons are inactive.



Changing the magnification of a report You can change the magnification of a report, to make it easier to read on your computer screen. The magnification setting does not change how the report is printed or saved.

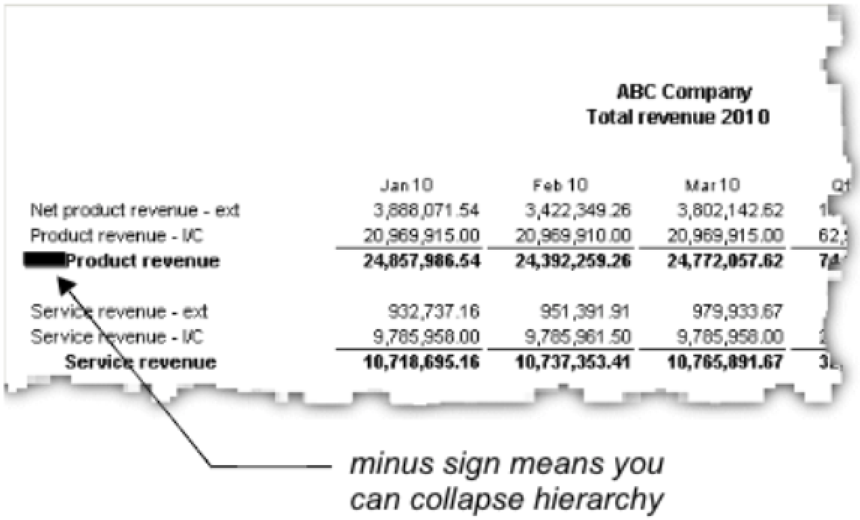
To change the magnification of a report on your computer screen, select the appropriate percentage in the **Zoom** field.

The default value is 100%.

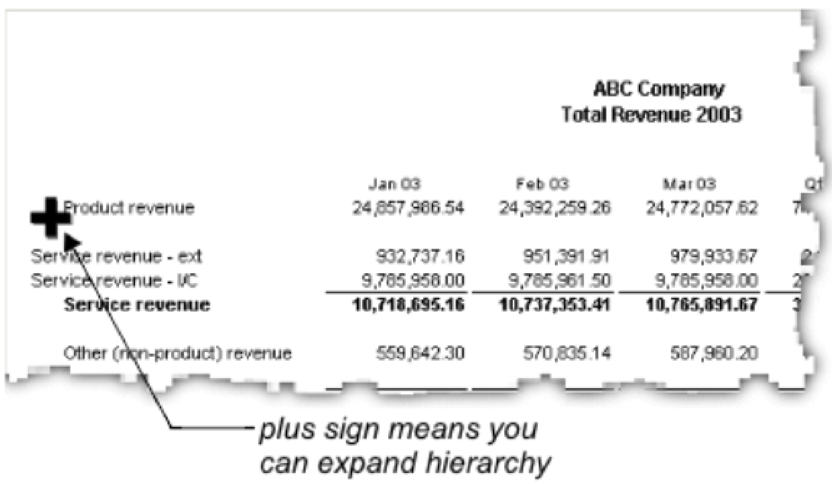
Changing the level of symbol detail

Depending on your role and the properties of the template, you may be able to increase or decrease the level of hierarchy detail within a report.

To do so, place the arrow pointer over a parent symbol. If a minus sign appears, you can collapse the hierarchy.



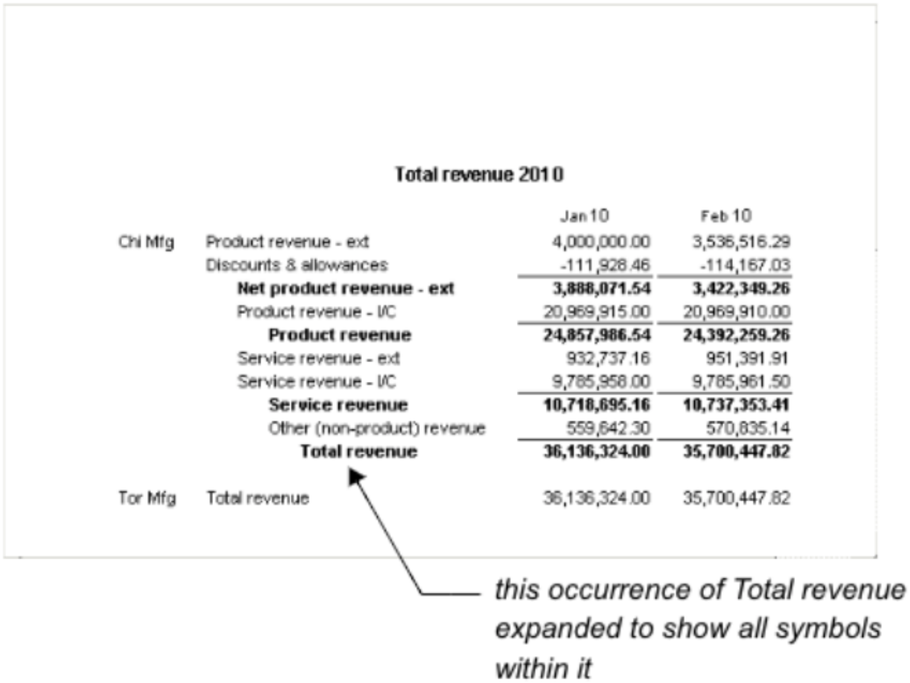
If a plus sign appears, you can expand the hierarchy. If you expand a ***down dimension***, the hierarchy expands downwards; if you expand the ***across dimension***, the hierarchy expands to the right.



Expanding and collapsing a hierarchy

You can expand and collapse hierarchies in the down and across dimensions of a report by clicking the plus and minus signs beside parent symbols, as described in Changing the level of symbol detail.

However, you can also choose a menu command to expand a selected parent symbol to show every level of symbol detail within it. For example:

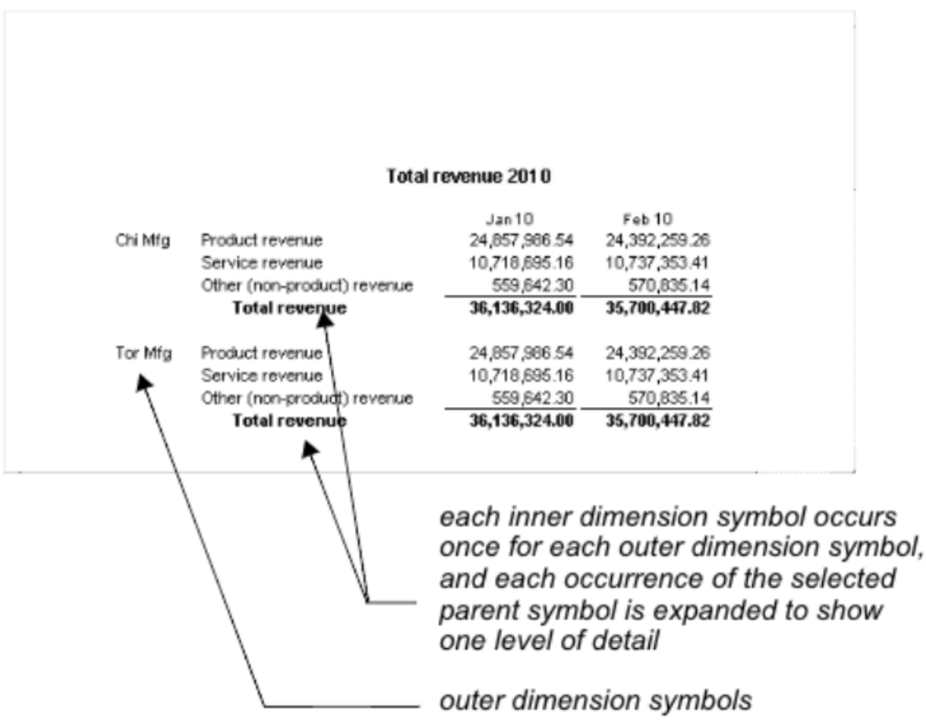


Total revenue 2010

		Jan 10	Feb 10
Chi Mfg	Product revenue - ext	4,000,000.00	3,536,516.29
	Discounts & allowances	-111,928.46	-114,167.03
	Net product revenue - ext	**3,888,071.54**	**3,422,349.26**
	Product revenue - I/C	20,969,915.00	20,969,910.00
	Product revenue	**24,857,986.54**	**24,392,259.26**
	Service revenue - ext	932,737.16	951,391.91
	Service revenue - I/C	9,785,958.00	9,785,961.50
	Service revenue	**10,718,695.16**	**10,737,353.41**
	Other (non-product) revenue	559,642.30	570,835.14
	Total revenue	**36,136,324.00**	**35,700,447.82**
Tor Mfg	Total revenue	36,136,324.00	35,700,447.82

You can also choose a menu command to display one level of detail within each occurrence of a selected parent symbol.

For example, if you have two outer dimension symbols, each inner dimension symbol occurs twice. You can expand each occurrence of the same parent symbol in the down or across dimensions to show one level of detail below the selected parent. For example:



Total revenue 2010

		Jan 10	Feb 10
Chi Mfg	Product revenue	24,857,986.54	24,392,259.26
	Service revenue	10,718,695.16	10,737,353.41
	Other (non-product) revenue	559,642.30	570,835.14
	Total revenue	**36,136,324.00**	**35,700,447.82**
Tor Mfg	Product revenue	24,857,986.54	24,392,259.26
	Service revenue	10,718,695.16	10,737,353.41
	Other (non-product) revenue	559,642.30	570,835.14
	Total revenue	**36,136,324.00**	**35,700,447.82**

Expanding hierarchies

To expand hierarchies in a report, follow these steps.

1. Right-click a parent symbol. A pop-up menu appears.
2. Do one of the following:
   - Choose Expand All For Selected Symbol. The hierarchy expands to show all symbols within the selected parent symbol, but only for the selected occurrence of that parent symbol. Other occurrences of that parent symbol are not expanded.
   - Choose Expand One Level for All Occurrences. The hierarchy expands to only the first level of symbols under the selected parent symbol, for all the occurrences of that parent symbol.
   - In a template that includes an inner dimension, expand the inner dimension to display the symbols you want, and then right-click its corresponding symbol in the outer dimension and select Expand One - Match Inner Detail. This expands the outer dimension symbol one level down, and for each outer dimension child symbol, the inner dimension expands to match the inner dimension expansion of the parent symbol.
   - In a template that includes an inner dimension, expand the inner dimension to display the symbols you want, and then right-click in the outer dimension and select Expand All - Match Inner Detail. This expands all symbols visible in the outer dimension all levels down, and for each outer dimension child symbol, the inner dimension expands to match the inner dimension expansion of the parent symbol.
   - Click Expand All For All to expand all the symbols in all the dimensions in a given direction.

     Caution: Depending on the number of symbols in your template, the Expand All For All function has the potential to retrieve huge amounts of data, which may adversely affect the performance of your system. Use this function with caution.

Collapsing hierarchies

To collapse hierarchies in a report, follow these steps.

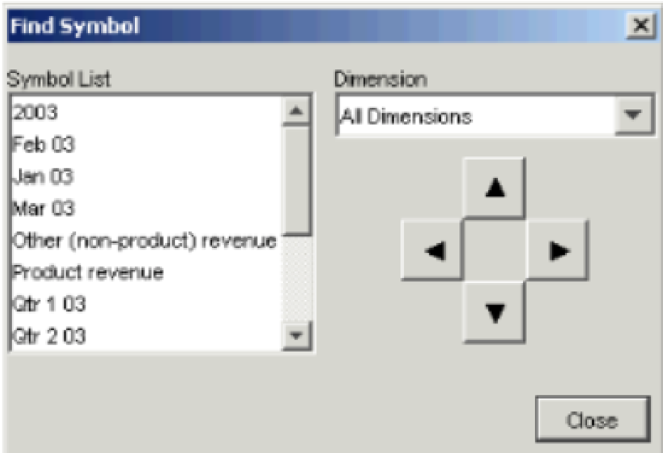
1. To collapse all hierarchies in a dimension, right-click any symbol in that dimension, and click Collapse All. All hierarchies in that dimension are collapsed.
2. To collapse the parent of a symbol, right-click the symbol whose parent you want to collapse and click Collapse Parent. The parent is collapsed.

Finding a specific symbol in a report

To navigate through a report, you can use the standard method of pressing the arrow keys and scroll bars. However, this can be time-consuming in a large report. If you know the name of the symbol you want to find, you can go to it directly.

To find a specific symbol, follow these steps.

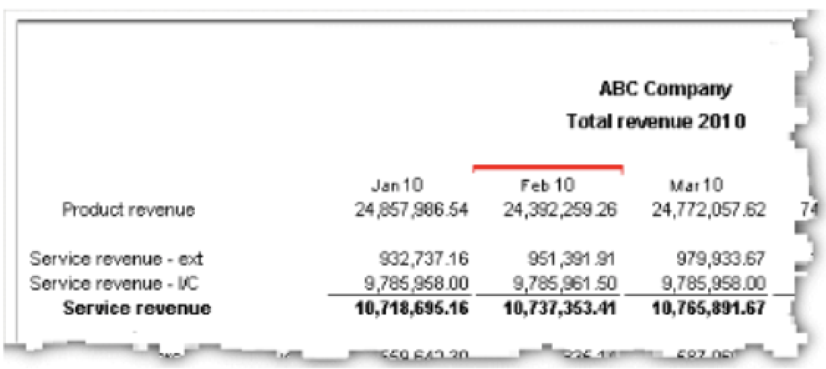
1. In the report view, choose Go > Find Symbol. The Find Symbol dialog appears, showing a list of all symbols in the ***down dimension*** and ***across dimension*** of the report.



2. Complete these fields:

Field	Description
Dimension	Select the dimension containing the symbol.
Symbol List	Select the symbol.

3. One or more of the arrow buttons become active, showing the direction in which, the symbol can be found. Select one of these buttons. The viewing area of the report shifts to display the symbol you selected, demarcated with a red marker.



4. To return to the report, click Close in the Find Symbol dialog.

Viewing additional information through links

The Publisher of a template may have set up external links to provide additional information about the template. The additional information may be available through a link to another web site, or perhaps to a pdf file containing additional information.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	yes

There are two types of links:

Field	Description
Cell-level	▪ Used to provide a link to an external URL, to provide additional information on a particular data cell. ▪ You can view this link from all cells in the template, except calculated cells or blank cells.
Template-level	▪ Used to provide information related to the template as a whole, such as instructions, in a pdf file. ▪ You can view this link from all cells, or from the toolbar or menu.

To view additional information through links, follow these steps.

1. Make sure you are working online. You cannot view links if you are working offline.
2. If any template-level links are associated with this template, all template links are listed in the Links menu. (If you are not a Publisher, and no template-level links are associated with this template, the Links menu does not appear at all.)
3. To view additional information related to a particular cell, right-click the cell. If any links of either type are associated with this template, they appear at the bottom of the pop-up menu.

Formatting reports

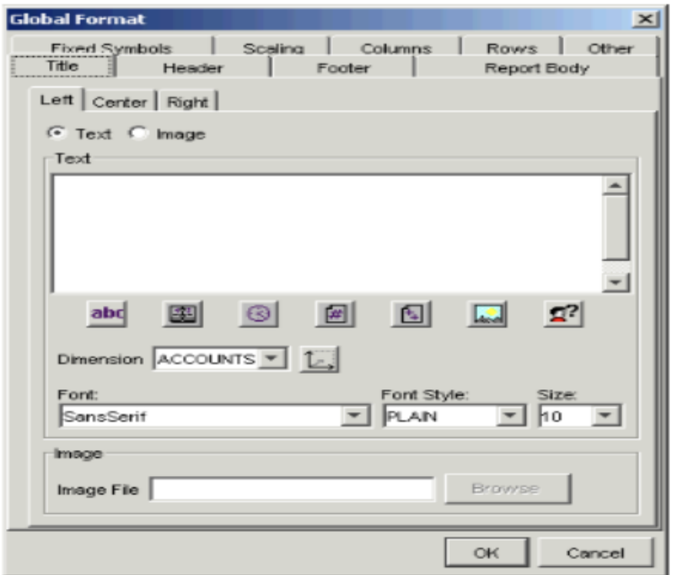
After you have opened a report, you may be able to change any or all of its features.

Specifying a title

Depending on your role and the properties of the template, you may be able to create a title for the report. The title provides a brief description of the report's contents.

To specify the title of a report, follow these steps.

1. In the report view, choose Format > Edit Global Format. The Global Format dialog appears, with the **Title** tab in view.



2. Click one of the following tabs:

Field	Description
Left	To place the report title on the left side of the page.
Center	To center the report title at the top of the page.
Right	To place the report title on the right side of the page.

3. If you want the title to contain text, do the following:
   a. In the **Text** field, type a title for the report.
   b. Complete these fields:

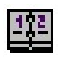
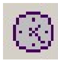
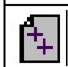
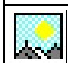
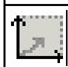
Field	Description
Font	Select a font for the report title.
Font Style	Select a font style for the report title.
Size	Select a font size for the report title.

4. You can insert additional items whose values may change — for example, the page number or current date. The application inserts a ***token*** as a placeholder, to ensure that the date shown on the report, for example, is always current when saved. The token appears in the format:

```
%%TokenName%%
```

To use a token to insert information into the title, click the following icons as required:

Icon	Description
	To insert the schedule name, description, or both, into the report title. This option applies only if the report contains schedule information.

Icon	Description
	To insert the date into the report title.
	To insert the time into the report title.
	To insert the page number into the report title.
	To insert the page number and total number of pages into the report title – for example, “2 of 10”.
	To insert the name of the template into the report title.
	To insert the current user’s full name into the report title.
	To insert a list of the report’s root symbols for a particular dimension into the report title. Make sure you select the appropriate dimension in the Dimension field.

5. You can insert attribute values into the title by inserting an attribute token. To insert an attribute token into the title, enter the following into the **Text** field:

```
<%[[ATTRIBUTE,AttrClass,AttrName,ObjectName]]%>
```

where:

- AttrClass is the attribute class. It can be SYSTEM, SYMBOL, USER, or GROUP.

  Note: The GROUP attribute class can be used only with DESCRIPTIONs specified for the AttrName parameter, which retrieves the current user group description.

- AttrName is the attribute name.

- ObjectName is the attribute object. System attributes and the GROUP attribute class do not require an object. ObjectName is mandatory for symbol attributes and specifies the symbol name. ObjectName is optional for user attributes and specifies the user ID. If no ObjectName is specified, the current user ID is used.

  Note: You can also specify other tokens for the ObjectName parameter; for example, %%TIMEPER%%. For this token to resolve correctly, the dimension must have one symbol selected and only the symbol name displayed. For more information, see Specifying general settings.

  For example:

  ```
  <%[[ATTRIBUTE, SYMBOL, ZGPNativeCurrency, %%ENTITIES%%]]%>
  ```

  For more information on attribute tokens, see the *Longview Dashboard Designer Guide.*

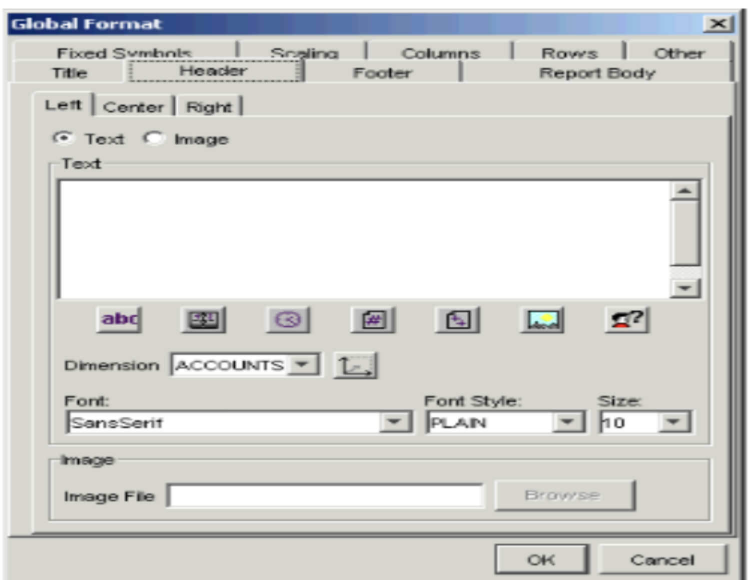
6. To insert an image, such as your company logo, into the title, do the following:
   a. Select **Image**.
   b. For **Image File**, type the name and path of the image file you want to use. If you are not sure of the file's name or location, click Browse.
7. To see what the report looks like when printed, click OK. The report view appears, showing your changes.

Specifying a header

Depending on your role and the properties of the template, you may be able to create a header to provide more information about the report. The header may provide additional information such as the date and time the report was created.

To specify the header in a report, follow these steps.

1. In the report view, choose Format > Edit Global Format. The Global Format dialog appears.
2. Click the **Header** tab.



3. Click one of the following tabs:

Field	Description
Left	To place the report header on the left side of the page.
Center	To center the report header at the top of the page.
Right	To place the report header on the right side of the page.

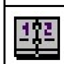
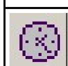
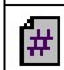
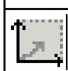
4. If you want the header to contain text, do the following:
   a. In the **Text** field, enter text for the header.
   b. Complete these fields:

Field	Description
Font	Select a font for the report header.
Font Style	Select a font style for the report header.
Size	Select a font size for the report header.

5. You can insert additional items whose values may change — for example, the page number or current date. The application inserts a ***token*** as a placeholder, to ensure that the date shown on the report, for example, is always current when saved. The token appears in the format:

```
%%TokenName%%
```

To use a token to insert information into the header, click the following icons as required:

Icon	Description
	To insert the schedule name, description, or both, into the header. This option applies only if the report contains schedule information.
	To insert the date into the header.
	To insert the time into the header.
	To insert the page number into the header.
	To insert the page number and total number of pages into the header – for example, “2 of 10”.
	To insert the name of the template into the header.
	To insert the current user’s full name into the header.
	To insert a list of the report’s root symbols for a particular dimension into the report header. Make sure you select the appropriate dimension in the Dimension field.

6. You can insert attribute values into the header by inserting an attribute token. To insert an attribute token into the header, enter the following into the **Text** field:

```
<%[[ATTRIBUTE,AttrClass,AttrName,ObjectName]]%>
```

where:

- AttrClass is the attribute class. It can be SYSTEM, SYMBOL, USER, or GROUP.

  > **Note:** The GROUP attribute class can be used only with DESCRIPTION specified for the AttrName parameter, which retrieves the current user group description.

- AttrName is the attribute name.

- ObjectName is the attribute object. System attributes and the GROUP attribute class do not require an object. ObjectName is mandatory for symbol attributes and specifies the symbol name. ObjectName is optional for user attributes and specifies the user ID. If no ObjectName is specified, the current user ID is used.

  > **Note:** You can also specify other tokens for the ObjectName parameter; for example, %%TIMEPER%%. For this token to resolve correctly, the dimension must have one symbol selected and only the symbol name displayed. For more information, see Specifying general settings.

  For example:

  ```
  <%[[ATTRIBUTE, SYMBOL, ZGPNativeCurrency, %%ENTITIES%%]]%>
  ```

  For more information on attribute tokens, see the *Longview Dashboard Designer Guide*.

7. To insert an image, such as your company logo, into the header, do the following:
   a. Select **Image**.
   b. For **Image File**, type the name and path of the image file you want to use. If you are not sure of the file's name or location, click Browse.

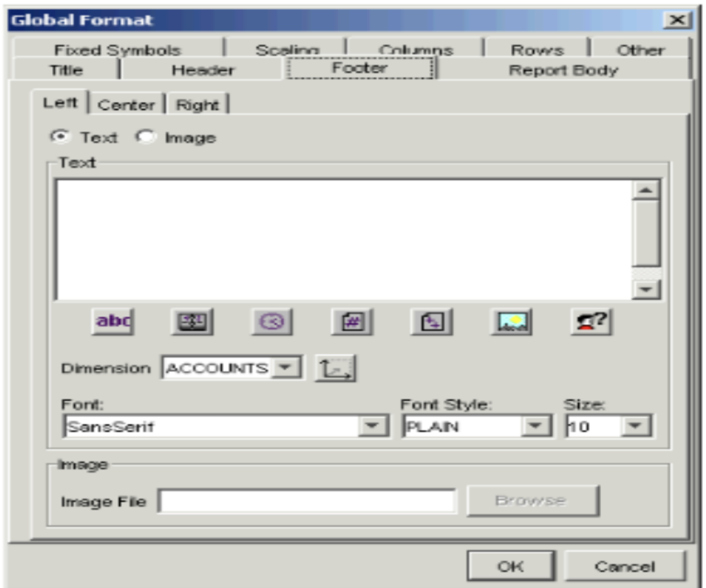
8. To see what the report looks like when printed, click OK. The report view appears showing your changes.

Specifying a footer

Depending on your role and the properties of the template, you may be able to create a footer to provide more information about a report. The footer may provide additional report information such as page numbering and total number of pages in the report.

To specify a footer for a report, follow these steps.

1. In the report view, choose Format > Edit Global Format. The Global Format dialog appears.
2. Click the **Footer** tab.



3. Click one of the following tabs:

Field	Description
Left	To place the report footer on the left side of the page.
Center	To center the report footer at the bottom of the page.
Right	To place the report footer on the right side of the page.

4. If you want the footer to contain text, do the following:
   a. In the Text field, type text for the footer.
   b. Complete these fields:

Field	Description
Font	Select a font for the report footer.
Font Style	Select a font style for the report footer.
Size	Select a font size for the report footer.

5. You can insert additional items whose values may change — for example, the page number or current date. The application inserts a **token** as a placeholder, to ensure that the date shown on the report, will always be current when saved. The token appears in the format:

```
%%TokenName%%
```

To use a token to insert information into the footer, click the following icons as required:

Icon	Description
	To insert the schedule name, description, or both, into the footer. This option applies only if the report contains schedule information.
	To insert the date into the footer.
	To insert the time into the footer.
	To insert the page number into the footer.
	To insert the page number and total number of pages into the footer – for example, “2 of 10”.
	To insert the name of the template into the footer.
	To insert the current user’s full name into the footer.
	To insert a list of the report’s root symbols for a particular dimension into the report footer. Make sure you select the appropriate dimension in the Dimension field.

6. You can insert additional items whose values may change — for example, the page number or current date. The application inserts a token as a placeholder, to ensure that the date shown on the report will be current when saved. The token appears in the format:

```
<%[[ATTRIBUTE,AttrClass,AttrName,ObjectName]]%>
```

where:

- AttrClass is the attribute class. It can be SYSTEM, SYMBOL, USER, or GROUP.

  Note: The GROUP attribute class can be used only with DESCRIPTION specified for the AttrName parameter, which retrieves the current user group description.

- AttrName is the attribute name.

- ObjectName is the attribute object. System attributes and the GROUP attribute class do not require an object. ObjectName is mandatory for symbol attributes and specifies the symbol name. ObjectName is optional for user attributes and specifies the user ID. If no ObjectName is specified, the current user ID is used.

  Note: You can also specify other tokens for the ObjectName parameter; for example, %%TIMEPER%%. For this token to resolve correctly, the dimension must have one symbol selected and only the symbol name displayed. For more information, see Specifying general settings.

  For example:

```
<%[[ATTRIBUTE, SYMBOL, ZGPNativeCurrency, %%ENTITIES%%]]%>
```

For more information on attribute tokens, see the *Longview Dashboard Designer Guide*.

7. To insert an image, such as your company logo, into the header, do the following:
   a. Select **Image**.
   b. For Image File, type the name and path of the image file you want to use. If you are not sure of the file's name or location, click Browse.
8. To see what the report looks like when printed, click OK. The report view appears showing your changes.

Formatting the report body

The body of the report contains your data. Depending on your role and the properties of the template, you may be able to specify the underlines, gridlines, grid-shading, and frames used to accentuate your data, as well as the number formatting in which your data is displayed.

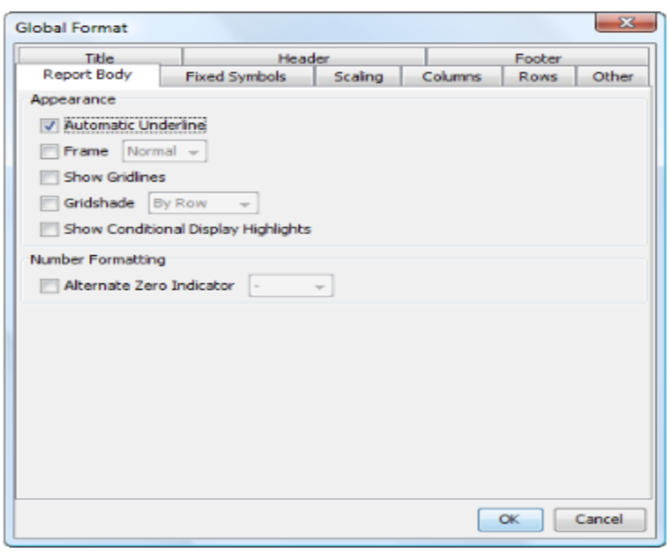
To specify the fonts in which your data is displayed, see Formatting columns, and Formatting rows.

To format the body of the report, follow these steps.

1. In the report view, choose Format > Edit Global Format. The Global Format dialog appears.

   Note: To display the report view, select View > Report.

2. Click the **Report Body** tab.



3. In the Appearance section, complete these fields:

Field	Description
Automatic Underline	Select this field if you want parent symbols automatically separated from their children with an underline.
Frame	Select this field if you want the body of the report framed with a border. Select the type of border in the drop-down list.
Show Gridlines	Select this field if you want gridlines separating each row and column.
Gridshade	Select this field if you want alternating rows or columns shaded. Then, select one of the two corresponding options in the drop-down list.
Show Conditional Display Highlights	Select this field if you want the conditional highlighting and colors to be carried over into the report view and Web reports. **Note:** Conditional display highlights are overridden by symbol shading.

4. For Alternate Zero Indicator, select this field if you want a character other than 0 to represent zero values, and then select the alternate character in the drop-down list.

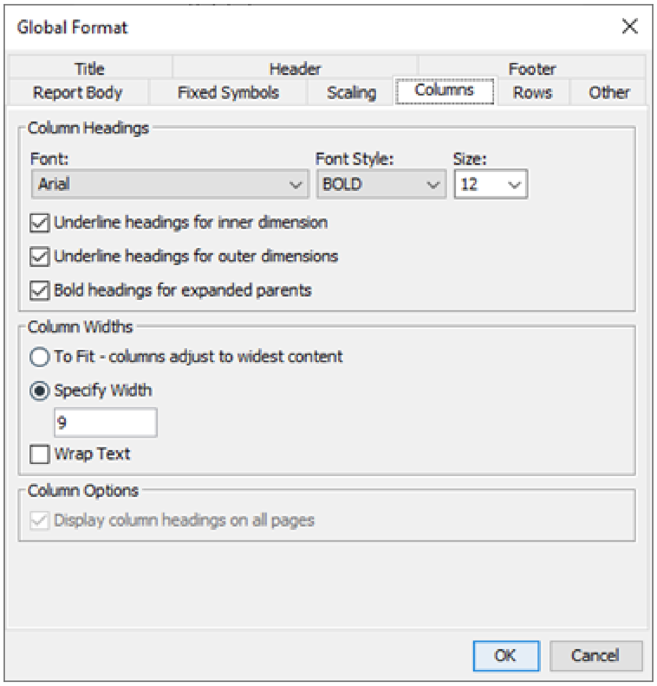
5. To see what the report looks like when printed, click OK. The report view appears showing your changes.

Formatting columns

Depending on your role and the properties of the template, you may be able to specify the font in which column headings appear as well as the width of a report's columns.

To specify the font of column headings and the width of columns in a report, follow these steps.

1. In the report view, choose Format > Edit Global Format. The Global Format dialog appears.
2. Click the **Columns** tab.



3. In the Column Headings section, complete these fields:

Field	Description
Font	Select a font for the column headings.
Font Style	Select a font style for the column headings.
Size	Select a font size for the column headings.
Underline headings for inner dimension	Select this to underline inner dimension headings.
Underline headings for outer dimensions	Select this to underline outer dimension headings.
Bold headings for expanded parentsUnderline	Select this to bold the parents in the column headers when the parent is expanded.

4. In the Column Widths section, complete these fields.

Field	Description
To Fit - columns adjust to widest content	To specify the width of the report columns as the width of the column with the longest description or largest number.
Specify Width - enter value below	To specify the width of the report columns as something other than the default. Enter the number of spaces in the field.
Wrap Text	If you want text to wrap to the width of columns, select this option.

5. In the Column Options section, complete the following.

Field	Description
Display column headings on all pages	Select this field if you want the column headers displayed on all pages of the report. Otherwise, clear this field and the column headers appear on the first page only.

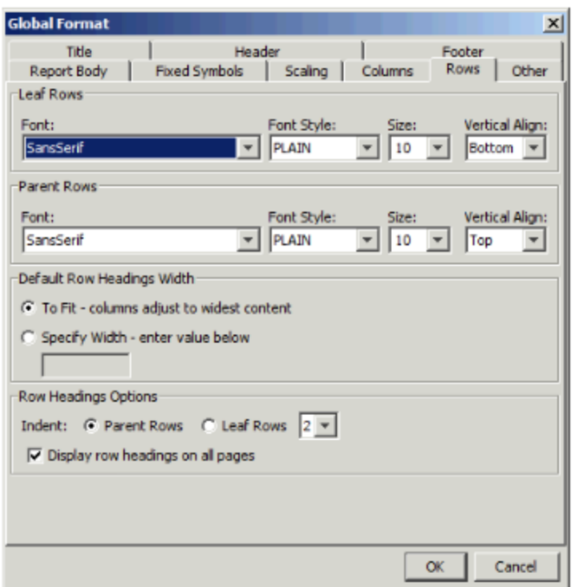
6. To see what the report looks like when printed, click OK. The report view appears showing your changes.

Formatting rows

Depending on your role and the properties of the template, you may be able to specify the font in which both leaf symbol and parent rows appear, as well as the width of row headings in a report.

To specify the font for leaf and parent rows, and the width of row headings in a report, follow these steps.

1. In the report view, choose Format > Edit Global Format. The Global Format dialog appears.
2. Click the **Rows** tab.



3. In the Leaf Row Font section, complete these fields:

Field	Description
Font	Select a font for the leaf rows.
Font Style	Select a font style for the leaf rows.
Size	Select a font size for the leaf rows.

Field	Description
Vertical Align	Select a row alignment for the leaf rows from one of: ▪ Top ▪ Middle ▪ Bottom

4. In the Parent Row Font section, complete these fields:

Field	Description
Font	Select a font for the parent rows.
Font Style	Select a font style for the parent rows.
Size	Select a font size for the parent rows.
Vertical Align	Select a row alignment for the parent rows from one of: ▪ Top ▪ Middle ▪ Bottom

5. In the Default Row Heading Width section, complete these fields.

Field	Description
To Fit - columns adjust to widest content	To specify the width of the report columns as the width of the column with the longest description or largest number.
Specify Width - enter value below	To specify the width of the report columns as something other than the default. Enter the number of spaces in the field.

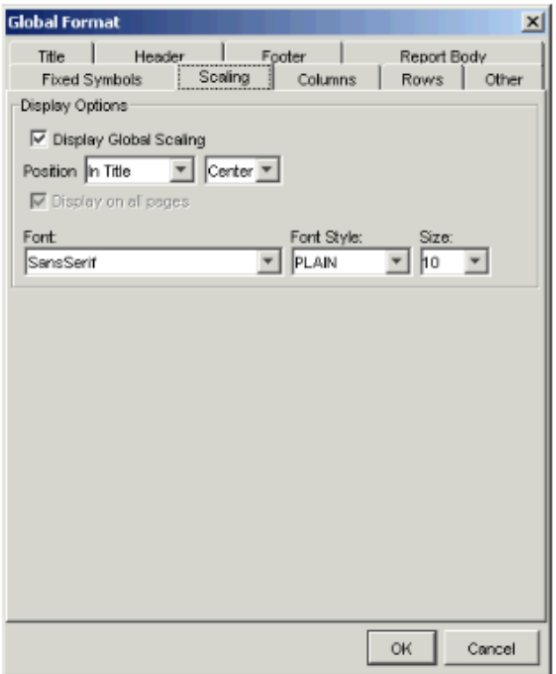
Displaying scaling settings

The format in which the data in a report appears is called scaling. For example, if you are dealing with very large numbers, you may want to view those numbers in, say, thousands or millions. This makes the numbers easier to read.

Depending on your role and the properties of the template, you may be able to specify whether the scaling setting used in the report is displayed.

To specifying whether the scaling setting of a report is displayed, follow these steps.

1. In the report view, choose Format > Edit Global Format. The Global Format dialog appears.
2. Click the **Scaling** tab.



3. Complete these fields:

Field	Description
Display Global Scaling	To display an indicator of the scaling used in the report, select this field.
Position	Select the position within the report in which you want to display the scaling indicator.
Display on all pages	Select this field to display the scaling indicator on all pages of the report. Otherwise, the scaling indicator appears on the first page only.
Font	Select a font for the scaling information.
Font Style	Select a font style for the scaling information.
Size	Select a font size for the scaling information.

4. To see what the report looks like when printed, click OK. The report view appears showing your changes.

5. In the Row Heading Options section, complete these fields.

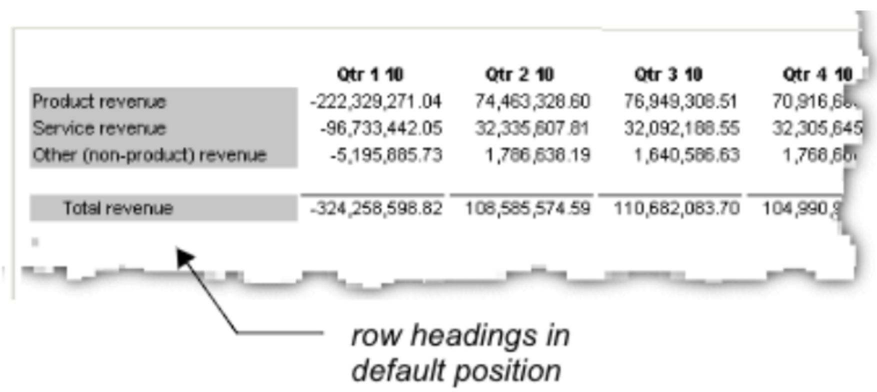
Field	Description
Indent	Use the radio buttons to select whether Parent Rows or Leaf Rows are indented in the report, and the drop-down list to specify how many spaces (0-5) each row should be indented relative to next level of the hierarchy. If Parent Rows is selected, leaf symbols in the hierarchy are displayed furthest left in the report, with parent symbols increasingly indented right the higher in the hierarchy they reside. If Leaf Rows is selected, the root symbol of the hierarchy is displayed furthest left in the report, with child and leaf symbols increasingly indented right the deeper in the hierarchy they reside.
Display row headings on all pages	Select this field to show row headings on all pages of the report. Otherwise, row headings appear on the first page only, while all other pages in the report show data only.

6. To see what the report looks like when printed, click OK. The report view appears showing your changes.

Changing the position of row headings

Depending on your role and the properties of the template, you may be able to move the row headings in a report to a new position.

The following illustration shows the row headings in the default position.



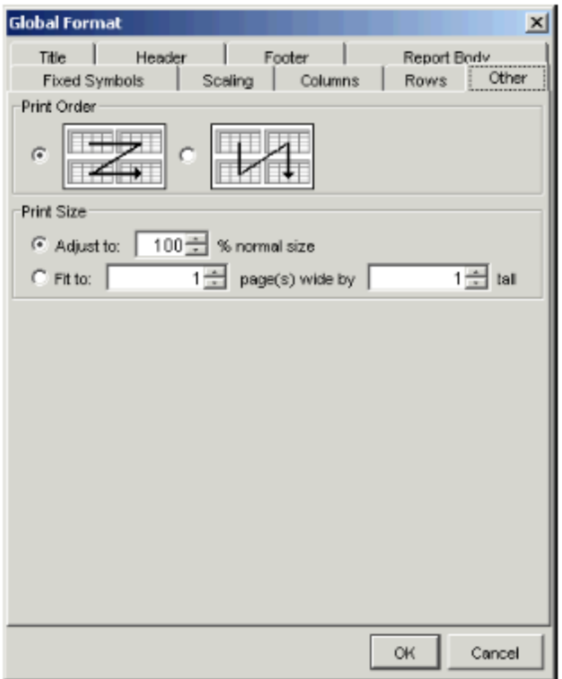
To change the position of the row headings, follow these steps.

1. In the report view, do one of the following:

   - For View Mode, select Without Page Break.

   - Enable the **Fit to page** option so that the report's contents fit to one page. To do so, choose Format > Edit Global Format. The Global Format dialog appears.

2. Click the **Other** tab.



3. Make sure **Fit to** is selected, and select **1** page wide by **1** page tall, in the corresponding fields.
4. Right-click on the heading of the column beside which you want to place the row headers. A pop-up menu appears.
5. Choose **Insert Row Heading**, followed by either **Before Column** or **After Column**. The row headings appear in the location you specified.

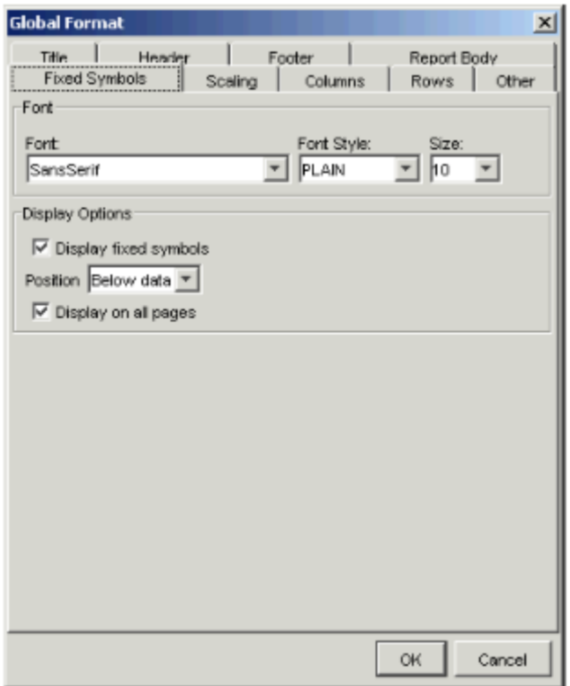
Specifying fixed symbols

Each dimension needs a reference to an individual default symbol in the dimension. The fixed symbol is a single symbol selected in one of the fixed dimensions.

By default, each fixed symbol in a report is displayed on all pages of that report, below the data. Depending on your role and the properties of the template, you may be able to change the position of these symbols, display them on the first page of the report only, or leave them out of the report altogether.

To specify the fixed symbols of a report, follow these steps.

1. In the report view, choose Format > Edit Global Format. The Global Format dialog appears.
2. Click the **Fixed Symbols** tab.



3. In the Font section, complete these fields:

Field	Description
Font	Select a font for the fixed symbols.
Font Style	Select a font style for the fixed symbols.
Size	Select a font size for the fixed symbols.

4. In the Display Options section, complete these fields.

Field	Description
Display fixed symbols	To display the fixed symbols in the report, select this field.
Position	You can display the fixed symbols either above or below the data.
Display on all pages	To display the fixed symbols on all pages of the report, select this field.

5. To see what the report looks like when printed, click OK. The report view appears showing your changes.

Formatting an individual symbol

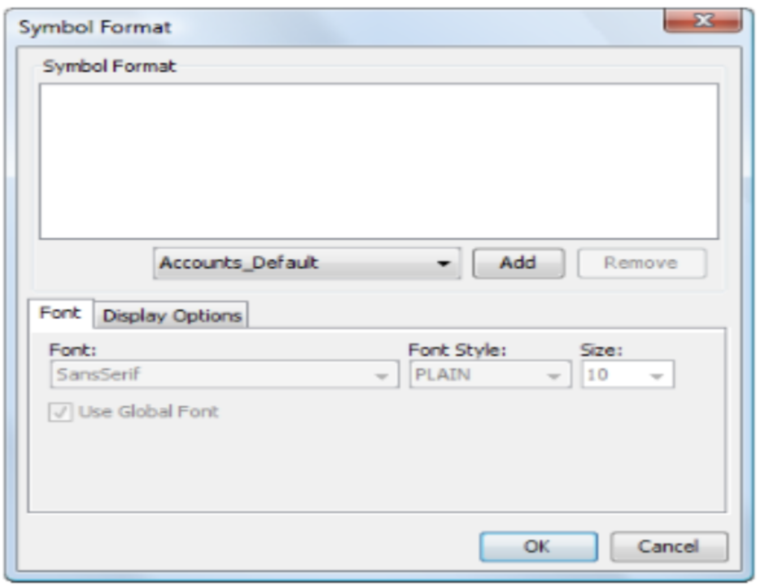
Depending on your role and the properties of the template, you may be able to edit the appearance of individual symbols in a report. For example, you may want to underline a specific symbol, add shading to another, or change the font of another.

For example, in the following illustration, the Total revenue symbol is outlined and shaded, for easier identification.

	Jan 10	Feb 10	Mar 10
Net product revenue - ext	3,888,071.54	3,422,349.26	3,802,142.62
Product revenue - I/C	20,969,915.00	20,969,910.00	20,969,915.00
Product revenue	**24,857,986.54**	**24,392,259.26**	**24,772,057.62**
Service revenue - ext	932,737.16	951,391.91	979,933.67
Service revenue - I/C	9,785,958.00	9,785,961.50	9,785,958.00
Service revenue	**10,718,695.16**	**10,737,353.41**	**10,765,891.67**
Other (non-product) revenue	559,642.30	570,835.14	587,960.20
Total revenue	**36,136,324.00**	**35,700,447.82**	**36,125,909.49**

To edit the format of an individual symbol, follow these steps.

1. In the report view, choose Format > Edit Symbol Format, and select the dimension containing the symbols you want to change. (Alternatively, you can right-click on a symbol name or description, and in the menu that appears, choose Edit Symbol Format.) The Symbol Format dialog appears, with the Font tab in view.



2. In the drop-down list in the Symbol Format section, select the symbol whose format you want to edit. This symbol appears in the list box above, which lists all symbols with special formatting in the report.

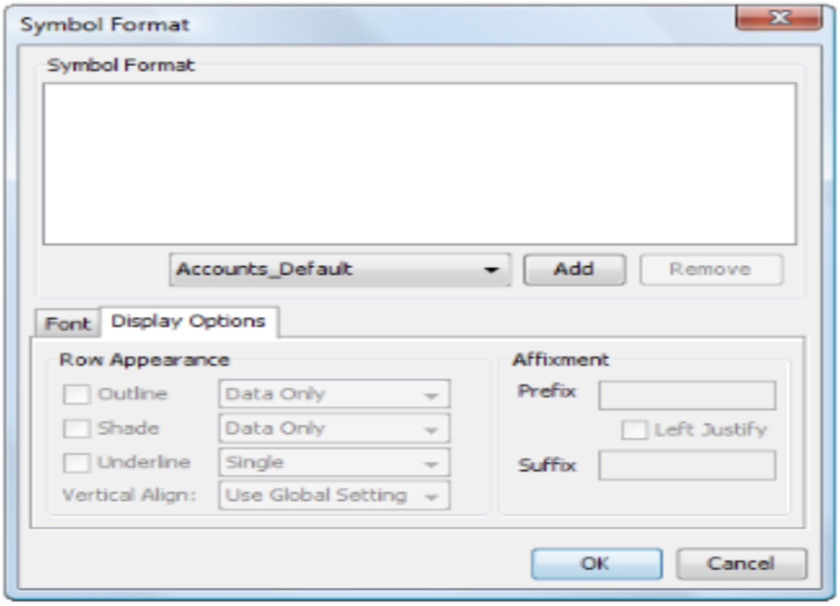
3. Make sure the symbol whose format you want to edit is selected in the list box.

4. Clear the **Use Global Font** field. The other fields on this tab become active.

5. Complete these fields:

Field	Description
Font	Select a font for the symbol.
Font Style	Select a font style for the symbol.
Size	Select a font size for the symbol.

6. To revert back to the original font, select **Use Global Font**.
7. Click the **Display Options** tab.

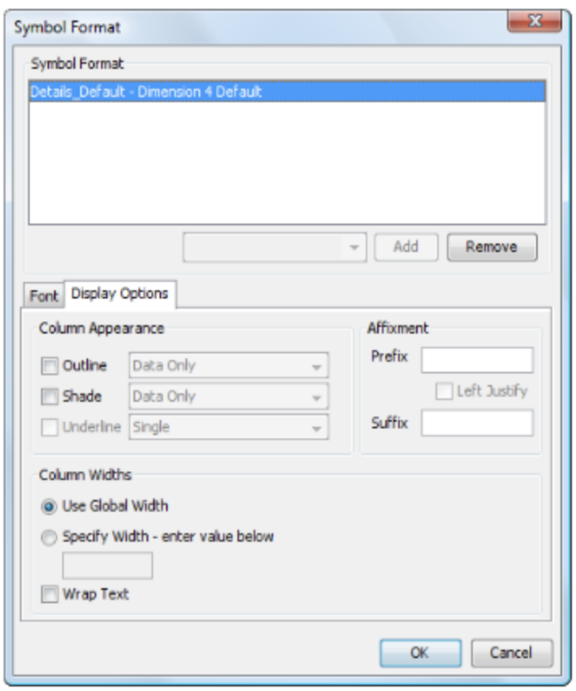


8. Make sure the symbol whose display options you want to edit is selected in the list box, and complete these fields:

Field	Description
Outline	Select this if you want the symbol's row or column outlined. Then, in the corresponding drop-down list, select one of the following: ▪ Data Only: To outline the data only. ▪ Data and Header: To outline both the data and heading. ▪ Data and Bordered Header: To outline both the data and heading, and to add a border around the header. This option is available only for column symbols.
Shade	Select this if you want the row or column shaded. Then, in the corresponding drop-down list, select one of the following: ▪ Data Only: To shade only the data. ▪ Data and Header: To shade both the data and header. ▪ Header only: To shade only the header.
Underline	Select this if you want the row underlined. Then, in the corresponding drop-down list, select one of the following: ▪ Single: To underline the data for the symbol with a single line. ▪ Double: To underline the data for the symbol with a double line.

Field	Description
Vertical Align	This option is available only for row symbols. Select this if you want to change the vertical alignment of the row. Then, in the corresponding drop-down list, select one of the following: ▪ Use Global Setting: To use the global alignment setting. ▪ Top: To align the symbol to the top of the report. ▪ Middle: To align the symbol to the middle of the report. ▪ Bottom: To align the symbol to the bottom of the report.
Prefix	If necessary, type a character to precede the data in the cell. For example, you may want to place a dollar sign ($) before the data.
Left Justify	Select this to left justify the prefix within the cell. This is useful if you want to align the prefixes in the report. If you do not select this, the prefix appears immediately to the left of the first digit in the value.
Suffix	If necessary, type a character to follow the data in the cell. For example, you may want to place a percent sign (%) after the data.

If you are editing the format of a column symbol, the Vertical Align option is not available and additional fields are available under Column Widths.



9. In addition to the fields listed above, complete the following fields:

Field	Description
Use Global Width	Select this option if you want to use the global width for columns.
Specify Width	To specify the width of the report columns as something other than the default. Enter the number of spaces in the field.
Wrap Text	If you want text to wrap to the width of columns, select this option.

Formatting an individual cell

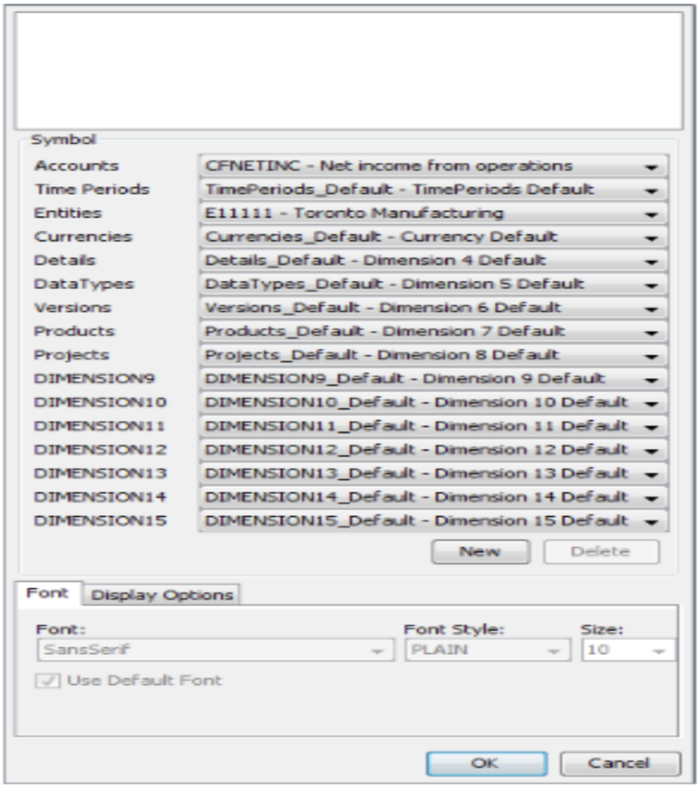
Depending on your role and the properties of the template, you may be able to edit the format of individual cells in a report, to make specific intersections of data stand out for easy identification.

For example, in the following report, the cell containing total revenue for the third quarter of 2003 stands out from the rest of the report.

	Qtr 1 10	Qtr 2 10	Qtr 3 10	Qtr 4 10
Net product revenue - ext	11,112,563.43	11,553,593.60	14,039,568.51	8,006,898.93
Product revenue - I/C	62,909,740.00	62,909,735.00	62,909,740.00	62,909,735.00
Product revenue	**74,022,303.43**	**74,463,328.60**	**76,949,308.51**	**70,916,633.93**
Service revenue - ext	2,864,062.74	2,977,730.31	2,734,311.05	2,947,768.19
Service revenue - I/C	29,357,877.50	29,357,877.50	29,357,877.50	29,357,877.50
Service revenue	**32,221,940.24**	**32,335,607.81**	**32,092,188.55**	**32,305,645.69**
Other (non-product) revenue	1,718,437.84	1,786,638.19	1,840,586.63	1,768,660.91
Total revenue	**107,962,681.31**	**108,585,574.59**	**110,682,083.70**	**104,990,940.53**

To edit the format of an individual cell, complete these steps.

1. In the report view, choose Format > Edit Cell Format. (Alternatively, you can right-click on a cell, and in the menu that appears, choose Edit Cell Format.) The Cell Format dialog appears, with the **Font** tab in view.



2. In the Symbol section, select a symbol for each dimension in the database, to specify the cell's coordinates.

3. Click New. The cell's coordinates appear in the large field above. This field lists all the cells in the report that have special formatting. To delete special formatting from a cell at any time, select it in this field, and click Delete.

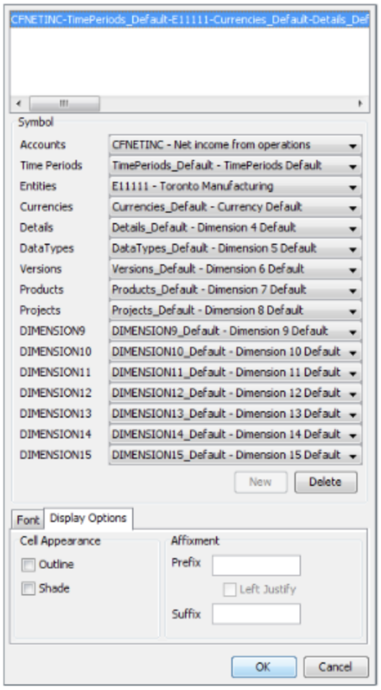
4. If you do not want to use the default fonts, clear the **Use Default Font** field. The other fields become active.

5. Complete these fields:

Field	Description
Font	Select a font for the data in the cell.
Font Style	Select a font style for the data in the cell.
Size	Select a font size for the data in the cell.

6. To revert back to the original font, select **Use Global Font**.

7. Click the **Display Options** tab in the Cell Format dialog.



8. Complete these fields:

Field	Description
Outline	Select this option to outline the cell.
Shade	Select this option to shade the cell.
Prefix	If necessary, type a character to precede the data in the cell. For example, you may want to place a dollar sign ($) before the data.
Left Justify	Select this option to left justify the prefix within the cell. This is useful if you want to align the prefixes in the report. If you do not select this, the prefix appears immediately to the left of the first digit in the value.
Suffix	If necessary, type a character to follow the data in the cell. For example, you may want to place a percent sign (%) after the data.

9. Click OK. The report view appears showing your changes.

Adjusting spacing in reports

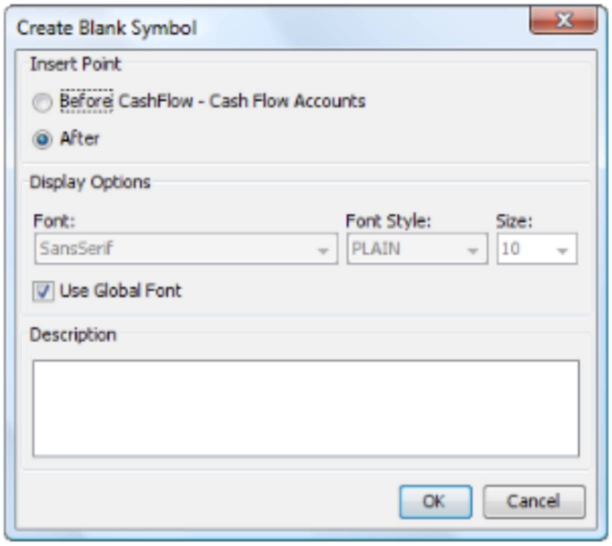
To make a report easier to read, you may be able to separate certain symbols by inserting a blank row or column between them. Depending on your role and the properties of the template, you may be able to insert blank rows or columns.

Creating a spacing row or column in a report

To make a report easier to read, you may want to separate certain symbols by inserting a blank row or column between them.

To create a blank row or column in a report, follow these steps.

1. In the report view, find the symbol beside which you want to create a blank symbol.
2. Right-click on the symbol. A pop-up menu appears.
3. Choose Insert Blank Symbol. The Create Blank Symbol dialog appears.



4. Complete these fields:

Field	Description
Before	To insert the blank symbol before the symbol you selected in step 1, select this field.
After	To insert the blank symbol after the symbol you selected in step 1, select this field.

5. If you don't want to use the global font, clear the **Use Global Font** field. The other Display Options fields become active.

Field	Description
Column Width	If you don't want to use the global column width, select Specify Width from the drop-down list, then type in your desired width in the adjacent field. **Note:** The column width field is only displayed when creating a blank symbol for a column.
Font	Select a font for the blank symbol description.
Font Style	Select a font style for the blank symbol description.
Size	Select a font size for the blank symbol description.
Description	If necessary, type a description for the blank symbol. This description is only shown in the report view.

6. Click OK. The report appears, showing the extra spacing.

	Qtr 1 10	Qtr 2 10	Qtr 3 10	Qtr 4 10
Net product revenue - ext	11,112,563.43	11,553,593.60	14,039,568.51	8,006,898.93
Product revenue - I/C	62,909,740.00	62,909,735.00	62,909,740.00	62,909,735.00
Product revenue	**74,022,303.43**	**74,463,328.60**	**76,949,308.51**	**70,916,633.93**
Service revenue - ext	2,864,062.74	2,977,730.31	2,734,311.05	2,947,768.19
Service revenue - I/C	29,357,877.50	29,357,877.50	29,357,877.50	29,357,877.50
Service revenue	**32,221,940.24**	**32,335,607.81**	**32,092,188.55**	**32,305,645.69**
Other (non-product) revenue	1,718,437.64	1,786,638.19	1,640,586.63	1,768,660.91
Total revenue	**107,962,681.31**	**108,585,574.59**	**110,682,083.70**	**104,990,940.53**

Editing a spacing row or column in a report

You may want to edit a blank row or column in a report.

To edit a blank row or column, follow these steps.

1. In the report view, find the blank symbol you want to edit.
2. Right-click on the symbol. A pop-up menu appears.
3. Choose Edit Blank Symbol. The Edit Blank Symbol dialog is displayed. Make your required changes to the blank symbol.

Deleting a spacing row or column from a report

You may want to delete a blank row or column in a report.

To delete a blank row or column, follow these steps.

1. In the report view, find the blank symbol you want to delete.
2. Right-click on the symbol. A pop-up menu appears.
3. Choose Remove Blank Symbol. The report appears, with the blank symbol deleted.

Viewing input comments

You can view the comments associated with data included in a report.

You cannot create comments in Longview Analysis and Reporting. You can only view the comments that others have created in Longview Input.

You can view comments only if the data cells they are associated with are currently visible in the report.

To view input comments in a report, follow these steps.

1. In the template, DataView, or input view, choose View > Report. The report view appears.
2. Select one of the following in the Display drop-down list.

Field	Description
Data Only	To view only the data in the report.

Field	Description
Comments Only	To view only the comments in the report.
Data and Comments	To view both the data and comments in the report. If you select this option, you may have to use the navigation buttons to find the page containing the comments.

The comments appear in the report, showing the cell coordinates, the date, and the author, of the comments.

3. To revert back to viewing data only, select **Data Only** in the Display drop-down list.

Printing reports

Once you have prepared a report, you can print it.

Working with page breaks

In reports that span multiple pages, the application automatically inserts page breaks so that the report can be easily printed. However, these page breaks may not be where you want them.

Depending on your access, you can manually insert page breaks wherever you want in a report.

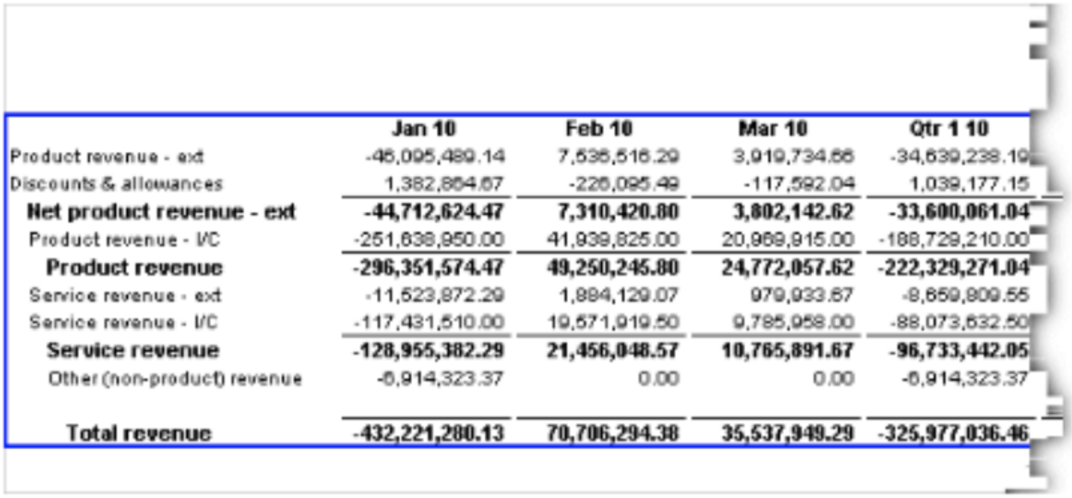
Note: Manually inserted page breaks do not appear in reports or templates accessed on the web.

Adding a page break

To add a page break to a report, follow these steps.

1. In the report view, select **Without Page Break** in the View Mode drop-down list. The report appears in Without Page Break mode.
2. Right-click anywhere in the body of the report. A pop-up menu appears.

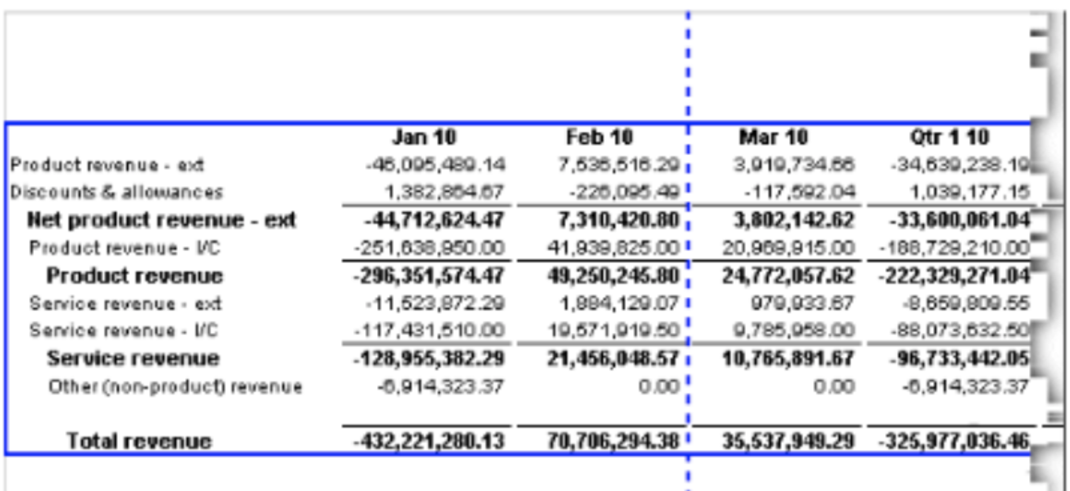
3. Choose Show Page Break Grid. The report is outlined with a blue frame.



	Jan 10	Feb 10	Mar 10	Qtr 1 10
Product revenue - ext	-46,095,489.14	7,536,516.29	3,919,734.66	-34,639,238.19
Discounts & allowances	1,382,864.67	-226,095.49	-117,592.04	1,039,177.15
Net product revenue - ext	-44,712,624.47	7,310,420.80	3,802,142.62	-33,600,061.04
Product revenue - I/C	-251,638,950.00	41,939,825.00	20,969,915.00	-188,729,210.00
Product revenue	-296,351,574.47	49,250,245.80	24,772,057.62	-222,329,271.04
Service revenue - ext	-11,523,872.29	1,884,129.07	979,933.67	-8,659,809.55
Service revenue - I/C	-117,431,510.00	19,571,919.50	9,785,958.00	-88,073,632.50
Service revenue	-128,955,382.29	21,456,048.57	10,765,891.67	-96,733,442.05
Other (non-product) revenue	-6,914,323.37	0.00	0.00	-6,914,323.37
Total revenue	-432,221,280.13	70,706,294.38	35,537,949.29	-325,977,036.46

4. Right-click on the row or column heading next to which you want to add a page break. (For symbols in the across direction, the page break is added to the right of the selected symbol. For symbols in the down direction, the page break is added below the selected symbol.) A pop-up menu appears.

5. Choose Add Page Break. A dashed blue line appears beside the symbol, signifying a page break.



	Jan 10	Feb 10	Mar 10	Qtr 1 10
Product revenue - ext	-46,095,489.14	7,536,516.29	3,919,734.66	-34,639,238.19
Discounts & allowances	1,382,864.67	-226,095.49	-117,592.04	1,039,177.15
Net product revenue - ext	-44,712,624.47	7,310,420.80	3,802,142.62	-33,600,061.04
Product revenue - I/C	-251,638,950.00	41,939,825.00	20,969,915.00	-188,729,210.00
Product revenue	-296,351,574.47	49,250,245.80	24,772,057.62	-222,329,271.04
Service revenue - ext	-11,523,872.29	1,884,129.07	979,933.67	-8,659,809.55
Service revenue - I/C	-117,431,510.00	19,571,919.50	9,785,958.00	-88,073,632.50
Service revenue	-128,955,382.29	21,456,048.57	10,765,891.67	-96,733,442.05
Other (non-product) revenue	-6,914,323.37	0.00	0.00	-6,914,323.37
Total revenue	-432,221,280.13	70,706,294.38	35,537,949.29	-325,977,036.46

6. Repeat step 4 and step 5 for each page break you want to add.

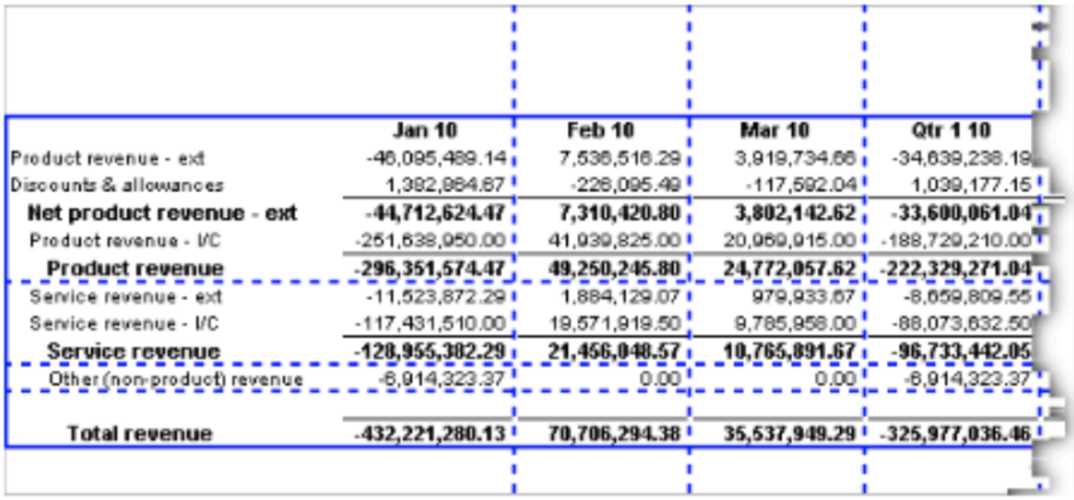
7. When you are finished adding page breaks, select **With Page Break** in the View Mode drop-down list. The report appears in With Page Break mode, divided into the pages you defined.

Removing a page break

To remove a page break, follow these steps.

1. In the report view, select **Without Page Break** in the View Mode drop-down list. The report appears in Without Page Break mode.

2. If the page break grid is not already showing, right-click anywhere in the report. A pop-up menu appears.
3. Choose Show Page Break Grid. The page break grid appears displaying all existing page breaks.



	Jan 10	Feb 10	Mar 10	Qtr 1 10
Product revenue - ext	-46,095,489.14	7,536,516.29	3,919,734.66	-34,639,238.19
Discounts & allowances	1,382,864.67	-226,095.49	-117,592.04	1,039,177.15
Net product revenue - ext	**-44,712,624.47**	**7,310,420.80**	**3,802,142.62**	**-33,600,061.04**
Product revenue - I/C	-251,638,950.00	41,939,825.00	20,969,915.00	-188,729,210.00
Product revenue	**-296,351,574.47**	**49,250,245.80**	**24,772,057.62**	**-222,329,271.04**
Service revenue - ext	-11,523,872.29	1,884,129.07	979,933.67	-8,659,809.55
Service revenue - I/C	-117,431,510.00	19,571,919.50	9,785,958.00	-88,073,632.50
Service revenue	**-128,955,382.29**	**21,456,048.57**	**10,765,891.67**	**-96,733,442.05**
Other (non-product) revenue	-6,914,323.37	0.00	0.00	-6,914,323.37
Total revenue	**-432,221,280.13**	**70,706,294.38**	**35,537,949.29**	**-325,977,036.46**

4. Right-click on the symbol next to which you want to remove a page break. (For symbols in the across direction, page breaks appear to the right of the selected symbol. For symbols in the down direction, page breaks appear below the selected symbol.) A pop-up menu appears.
5. Choose Remove Page Break. The page break is removed.

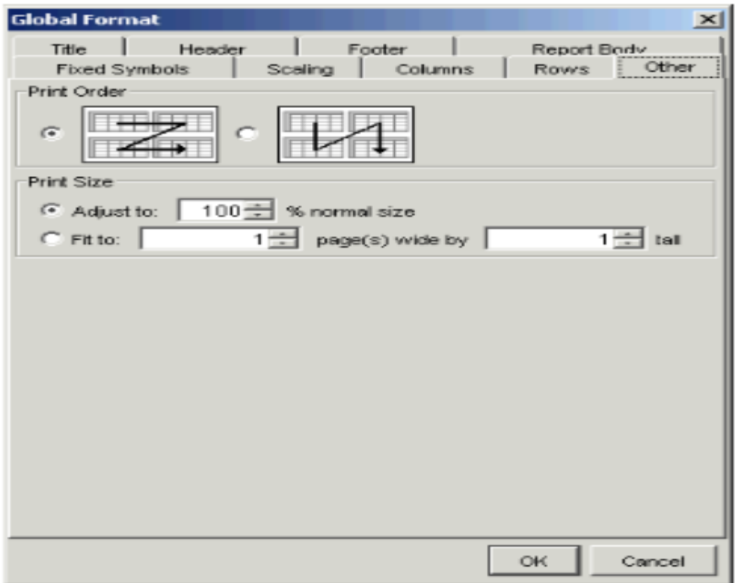
> **Note:** The only way to remove all manually created page breaks in a report is to remove each one individually using the steps in this procedure.

Specifying print order

Depending on your role and the properties of the template, you may be able to specify the order in which the pages of a report are printed — either from left to right, or top to bottom. Also, you can specify whether the entire contents of the report fit onto one page or not. Settings in this dialog are automatically used for printing Web reports and templates.

To specify the order in which the pages of a report are printed, follow these steps.

1. In the report view, choose Format > Edit Global Format. The Global Format dialog appears.
2. Click the **Other** tab.



3. Complete these fields:

Field	Description
Print Order	Select the direction in which you want to print the report.
Adjust to	Select the print size in the report as a percentage of the normal size.
Fit to	Select this field to have the entire contents of the report fit into the number of pages you specify in the corresponding fields.

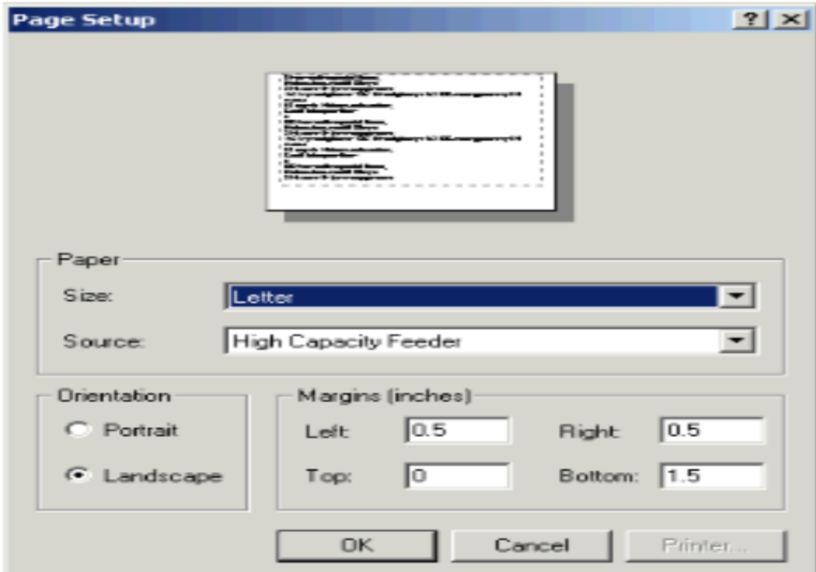
4. To see what the report looks like when printed, click OK. The report view appears showing your changes.

Specifying printer options

You can specify printer settings for reports — page width, page orientation, printer tray to use, and so on. You specify printer options in the Page Setup dialog. Paper and orientation settings specified in this dialog are used automatically when printing the report from the web.

To specify your printer options, follow these steps.

1. Choose File > Page Setup. The Page Setup dialog appears.



2. Complete these fields:

Field	Description
Size	Select the paper size for the report.
Source	Select the printer paper tray containing the correct paper for the report.
Orientation	Select an orientation for the report.
Margins (inches)	Select the top, bottom, left, and right margins for the report.

3. When you are satisfied with the printer settings, click OK. The report view appears.

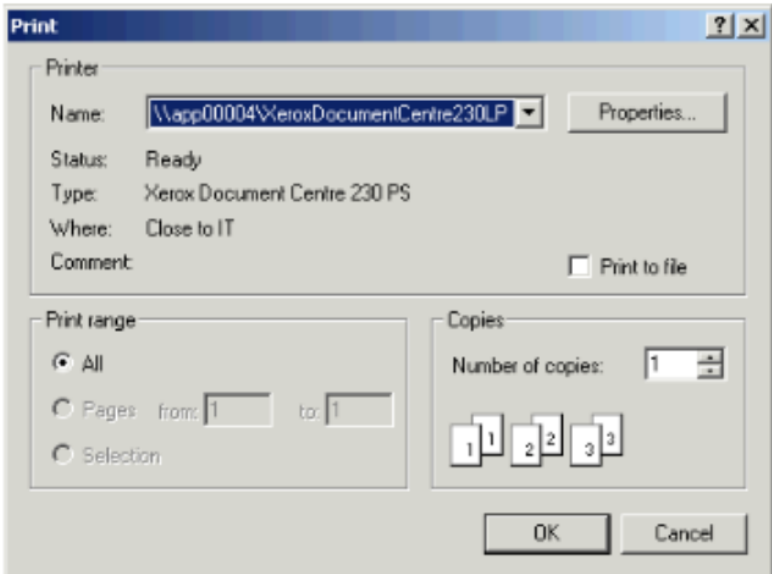
4. Proceed to Printing a report.

Printing a report

Once you have prepared your report, you can print it. Before you do, make sure you have specified your printer settings. For more information, see Specifying printer options.

To print a report, follow these steps.

1. In the report view, choose File > Print. The Print dialog appears.



2. Specify your printing options as required.

3. Click OK. Your report is printed, and the report view appears.

Saving reports

Once you have prepared your report, you can save it.

Saving a report in Acrobat (pdf) format

You can save a report in Acrobat format. An Acrobat document appears in portable document format and is identified by its file name extension pdf. Reports that you save in Acrobat format are read-only and can be viewed on any platform.

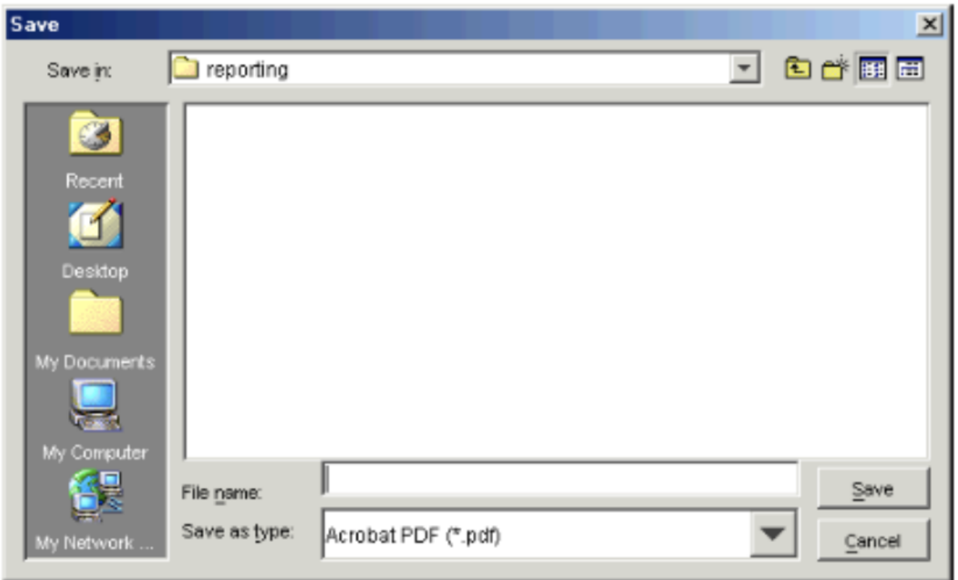
This is an ideal format for reports you want to post on the company network or intranet.

To view Acrobat documents, you need to have the free Acrobat Reader software, version 6.0 (or later), installed on your computer. If necessary, you can download the latest version of the software from: http://www.adobe.com

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	yes

To save a report in Acrobat format, follow these steps.

1. In the report view, choose File > Save As. The Save dialog appears.



2. Complete these fields:

Field	Description
Save in	Select the folder in which you want to save the report.
File name	Type a name for the report.
Save as type	Select Acrobat PDF (*.pdf).

3. Click Save. The file is saved, and the report view appears.

Saving a report in portable network graphics (png) format

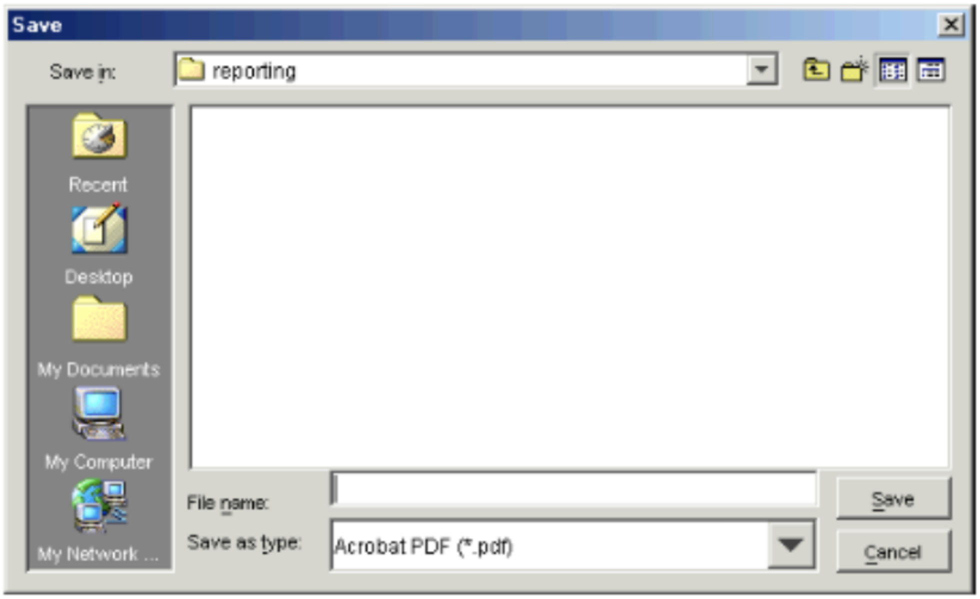
You can save a report in portable network graphics format. This type of file is read-only and is viewed as a graphic file through a web browser.

This is an ideal format for reports you want to post on the company network or intranet.

Role	Can perform this task?
Report Publisher	yes
Report Author	yes
Report User	yes

To save a report in portable network graphics format, follow these steps.

1. In the report view, choose File > Save As. The Save dialog appears.



2. Complete these fields:

Field	Description
Save in	Select the folder in which you want to save the report.
File name	Type a name for the report.
Save as type	Select PNG File (*.png).

3. Click Save. The file is saved, and the report view appears.

Publishing Report Templates And Batches

When you are finished working on a template, you need to make it available to the people in your company. To make a template available for use, you publish it.

Publishing report templates

To make a template available to other users, you need to publish it.

Preparing to publish a report template

Do not rush to publish before a template is complete. If you have to make changes to a template that has already been published, you have to republish it as well, so that the changes are available to users.

> **Caution:** If you publish a template that contains errors or omissions, and your user population starts to use it, logistical issues can result if you have to modify and republish the template at a later time. Before publishing a template, be sure to test it thoroughly to ensure its completeness and accuracy.

Editing dimension and symbol control

When you create a report template, you can specify the level of symbol control that users have in the published version of that report template.

For more information, see Saving a report template - Report Publishers.

Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

You may want to keep tight control of the dimensions and symbols used in the report. Alternatively, you may prefer to give users the ability to make some choices on their own.

The way in which you establish the level of control is by specifying whether dimensions are frozen and drillable:

- A frozen dimension is one in which the Report Publisher selects the symbols that can be used by the Report User.
- A drillable dimension is one in which the Report User has the ability to expand and collapse the symbol hierarchies within it.

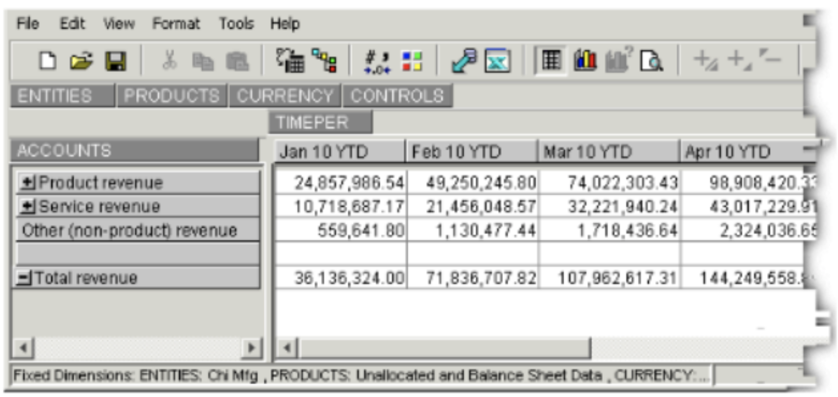
Depending on the combination you select, you can specify the choices of the Report User.

Combination	Report Publisher	Report User
Frozen + Not Drillable	Sets default symbols for the dimension.	Cannot select symbols. Can expand or collapse the hierarchy and see data for any symbol in the hierarchy below the default symbols.
Frozen + Drillable	Sets default symbols for the dimension.	Cannot select symbols. Can expand or collapse the hierarchy and see data for any symbol in the hierarchy below the default symbols.
Drillable + not Frozen (If a dimension is not frozen, it is automatically drillable.)	Does not enforce default symbols for the dimension.	Is prompted to select symbols in the dimension when opening the report, if symbols have not already been selected by the Report Publisher. If the symbols have already been selected by the Publisher, the Report User can change them.

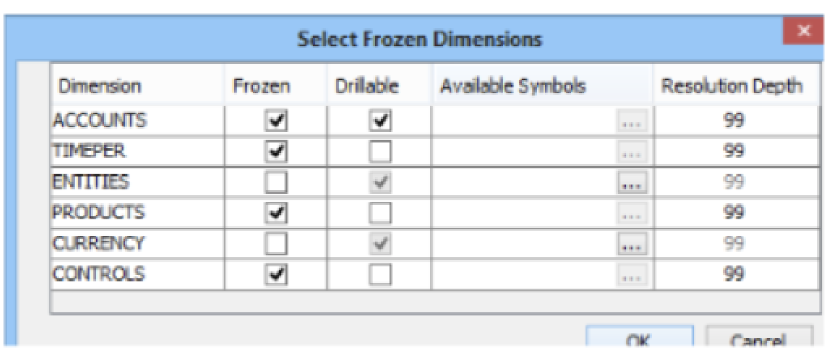
Note: To force Report Users to make symbol selections when opening a template, you can leave any of the down, across, and fixed dimensions blank when publishing.

To specify the Report Users' level of symbol control in a report template, follow these steps.

1. Open the report template. For more information, see Opening a report template - Report Publishers.



2. Choose Edit > Frozen Symbols. The Select Frozen Dimensions dialog appears.



3. For each dimension you want to change, complete these fields, as per the table in the introduction to this section:

Field	Description
Frozen	Select this field to specify that the dimension is frozen.
Drillable	If Frozen is cleared for this dimension, this field is automatically selected and cannot be cleared. Select this field to specify that the dimension is drillable.
Available Symbols	This field is available only if Frozen is cleared for this dimension. This field is unavailable for Schedule dimensions. Click the symbol selector button (...) and use the Available Symbol Selection dialog to specify the symbols that are available to Report Users in the Symbol Selections dialog in the template. If you do not specify any symbols for this field, all symbols that Report Users have access to in the dimension are available. **Note:** The symbols specified for this field should include the symbols selected for the template in Specifying orientation and symbols in a template. If a symbol is selected in the template and is not specified as an available symbol, Report Users cannot reselect it if they remove it in the Symbol Selections dialog.
Resolution Depth	This field is available only if Frozen is selected for this dimension. Specify the number of levels to go down in the hierarchy until a symbol the Report User has access to is reached. This number is only applicable when a template is set to use a symbol above the Report User's access in the hierarchy. This number may be entered manually (valid values are from 0 to 99) or can be selected by clicking the cell and selecting the number from the drop-down list. The default value for this field is 99.

4. Click OK. The report template appears.

5. Save the report template.

Publishing a report template

When you are finished working on a report template, you need to make it available to the people in your company. To make a report template available for use, you publish it.

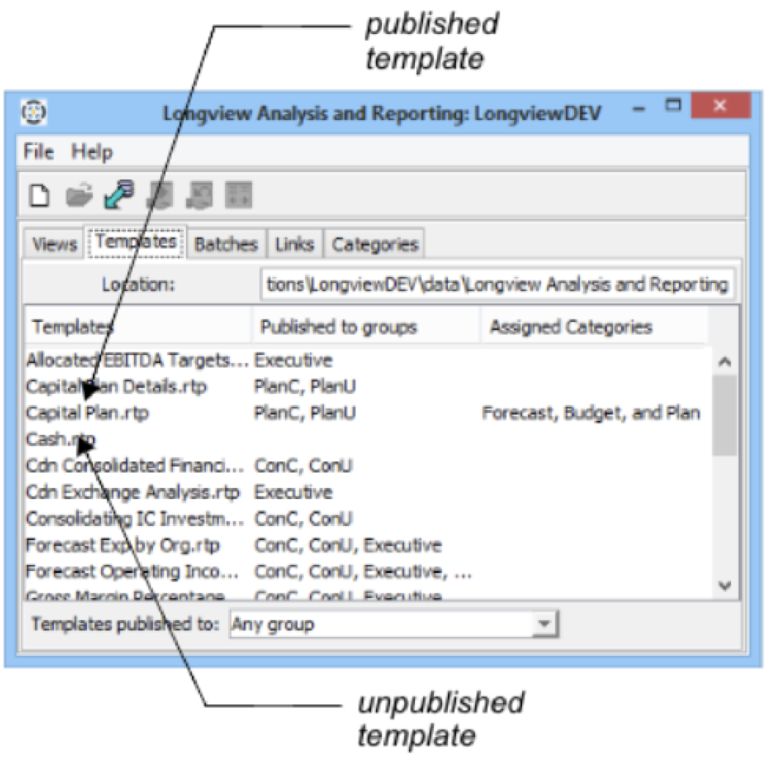
Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

When you publish a report template to the database, any unsaved changes are automatically saved to the local version of the template as well.

From the Longview Analysis and Reporting dialog

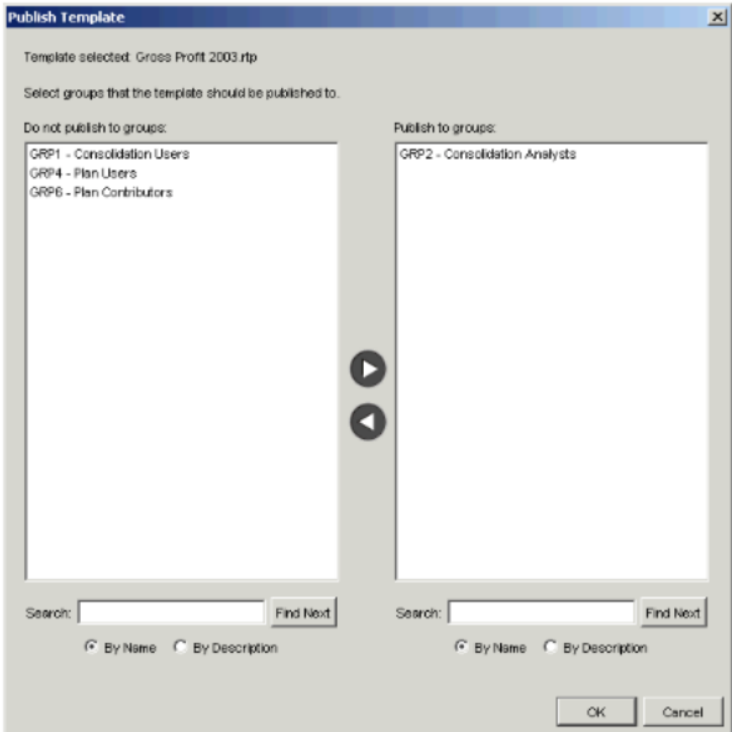
To publish a template from the Longview Analysis and Reporting dialog, follow these steps.

1. Make sure the dimension and symbol control settings are properly defined in the template. For more information, see Editing dimension and symbol control.
2. Open the Longview Analysis and Reporting dialog and click the Template stab. A list of templates appears.



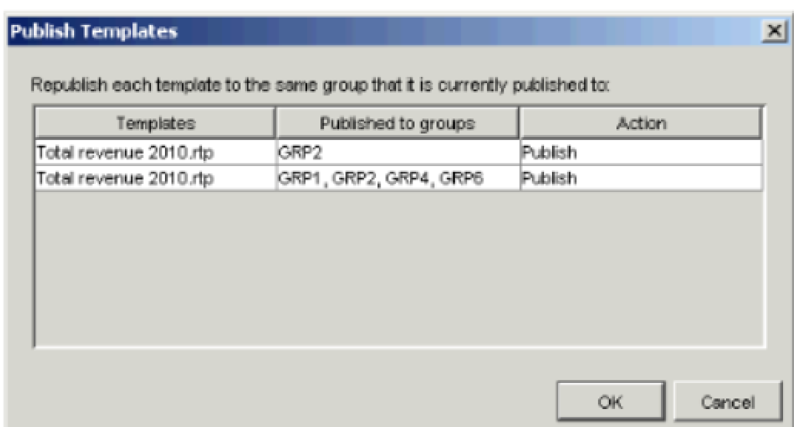
   Files are listed numerically and alphabetically. If a template has been published, the groups to which it has been published appear in the **Published to groups** column.

3. To see all of your existing templates, select **Any group** in the **Templates published to** field.
4. Select the template you want to publish. You can select more than one by holding down the Ctrl key while making your selections.
5. Choose File > Publish, and do one of the following:
   - If you selected only one template in step 4, or multiple templates that were originally published to exactly the same groups, the Publish Template dialog appears.



Proceed to step 6.

- If you selected more than one template in step 4, and those templates were originally published to different groups, the Publish Templates dialog appears listing the templates you selected, and the groups to which they were originally published.



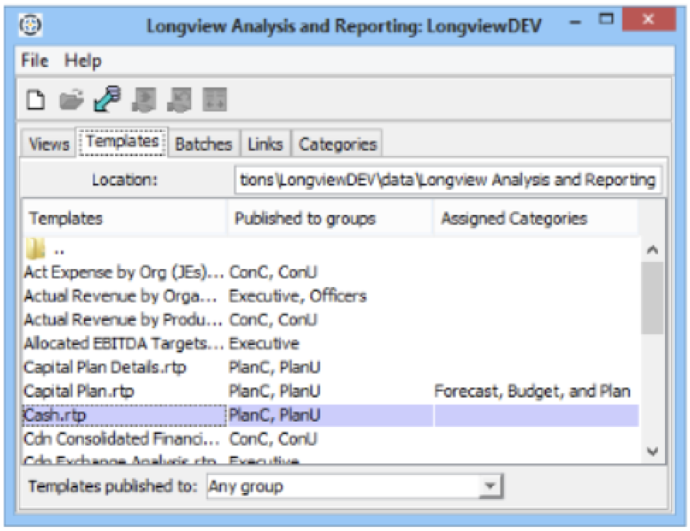
If you are happy with these settings, click OK. The templates are published to the groups listed in the **Published to groups** field, and the Longview Analysis and Reporting dialog appears.

Otherwise, click Cancel. The Longview Analysis and Reporting dialog appears. Return to the beginning of this procedure.

6. In the Do not publish to groups field, select the groups to which you want to publish the template, and move them to the Publish to groups field using the right arrow button. You can select more than one group at a time by holding down the Ctrl key while making your selections.

   Note: The groups that appear in these fields represent all groups to which the Report Publisher belongs (not necessarily all groups on the application database).

7. Click OK. The Longview Analysis and Reporting dialog appears. The groups to which the template has been published appear in the Published to groups column.



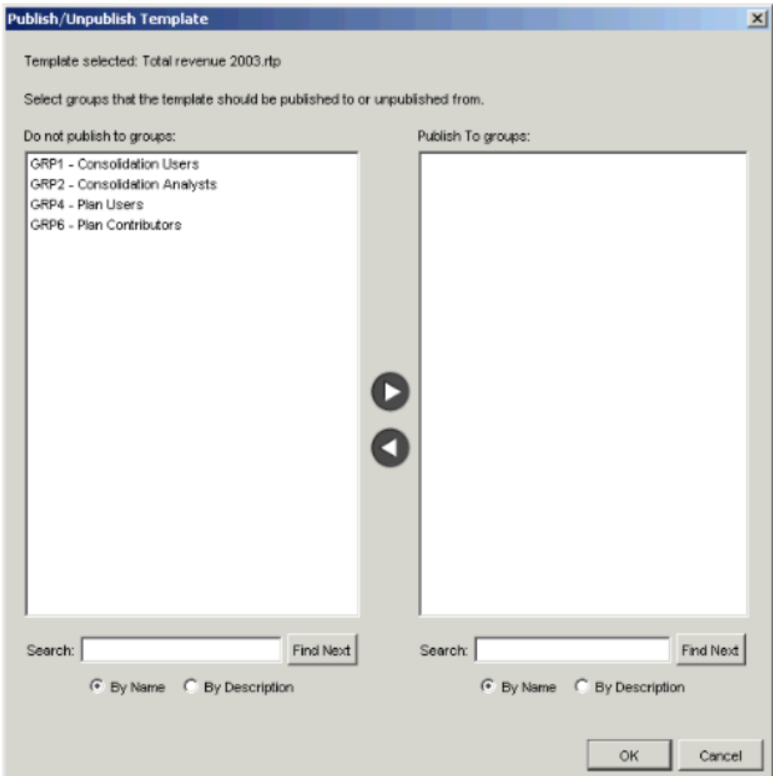
From the view window

To publish a template from the view window, follow these steps.

1. If you have not already saved the view as a report template, do so now. For more information, see Saving a report template - Report Publishers.

2. Make sure the dimension and symbol control settings are properly defined. For more information, see Editing dimension and symbol control.

3. In the view window, choose File > Publish/Unpublish. The Publish/Unpublish Template dialog appears.



4. In the **Do not publish to** groups field, select the groups to which you want to publish the template, and move them to the Publish to groups field using the right arrow button. You can select more than one group at a time by holding down the Ctrl key while making your selections.

   Note: The groups that appear in these fields represent all groups to which the Publisher belongs (not necessarily all groups on the application database).

5. Click OK. The template is published, and the view reappears.

Unpublishing a report template

The Report Publisher may need to edit a published ***template*** from time to time. To edit a published template, you should make it temporarily unavailable for use, so that users do not start to use the incorrect published version. To do so, you unpublish it.

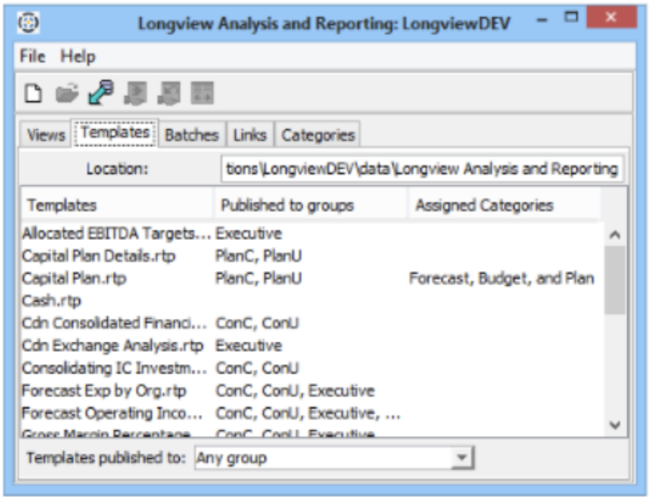
Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

If you want to keep a copy of a template for future use, make sure to open the template first, before unpublishing. When you open the template, you automatically create a copy on your hard drive.

Caution: If you unpublish a report template associated with a workflow process, and users try to access the template through the process, they will see an error message.

To unpublish a published template, follow these steps.

1. Open the Longview Analysis and Reporting dialog and click the **Template** stab. A list of templates appears.



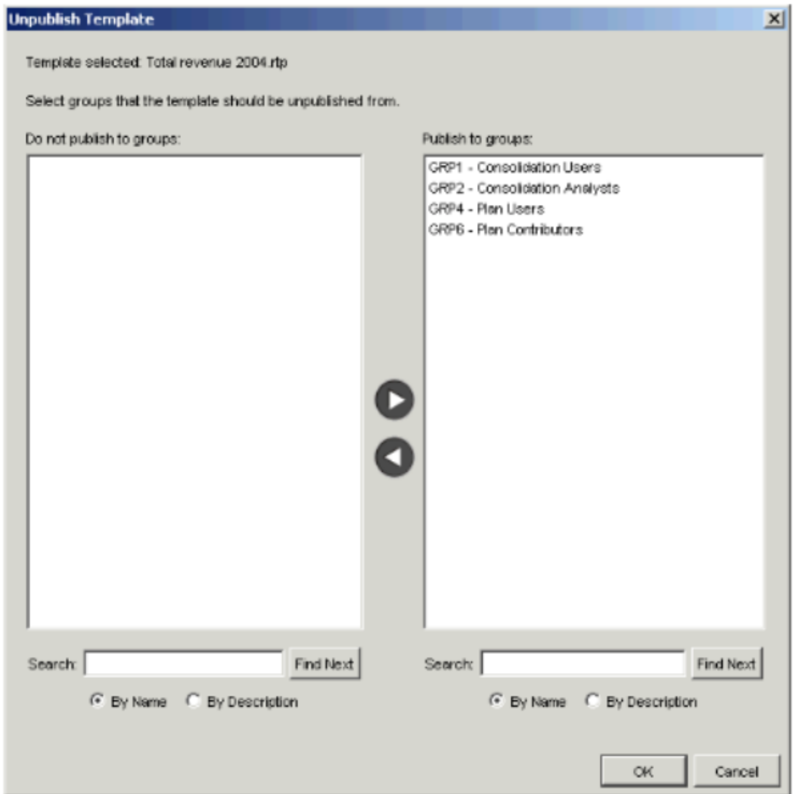
   Files are listed numerically and alphabetically. If a template has been published, the groups to which it has been published appear in the Published to groups column.

2. For Templates published to select the group to which you published the report template that you now want to unpublish. A list of report templates published to that group appears. For a list of all your existing report templates, select **Any group**.

3. Select the template you want to unpublish. You can select more than one by holding down the Ctrl key while making your selections.

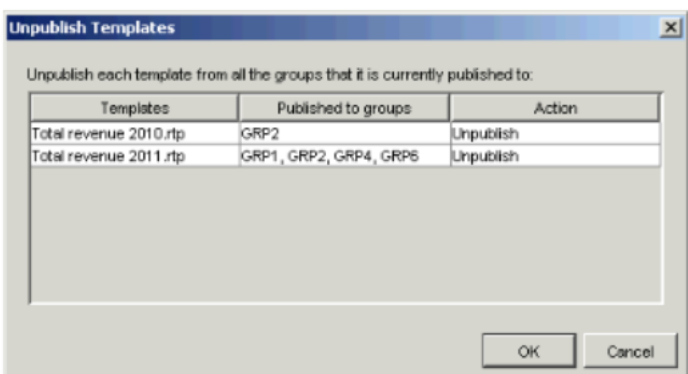
4. Choose File > Unpublish, and do one of the following:

   - If you selected only one template in step 3, or multiple templates that were originally published to exactly the same groups, the Unpublish Template dialog appears.



Proceed to step 5.

- If you selected more than one template in step 3, and those templates were originally published to different groups, the Unpublish Templates dialog appears listing the templates you selected, and the groups to which they were originally published.



If you are happy with these settings, click OK. The templates are unpublished from the groups listed in the Published to groups field, and the Longview Analysis and Reporting dialog appears.

Otherwise, click Cancel. The Longview Analysis and Reporting dialog appears. Return to the beginning of this procedure.

5. In the Publish to groups field, select the groups from which you want to remove access to the template, and move them to the Do not publish to groups field using the left arrow button. You can select more than one group at a time by holding down the Ctrl key while making your selections.

> **Note:** The groups that appear in these fields represent all groups to which the Report Publisher belongs (not necessarily all groups on the application database).

6. Click OK. The Longview Analysis and Reporting dialog appears.

Assigning report templates to categories

You may have to work with a large number of report templates. In order to better sort and organize report templates, you can assign them to categories.

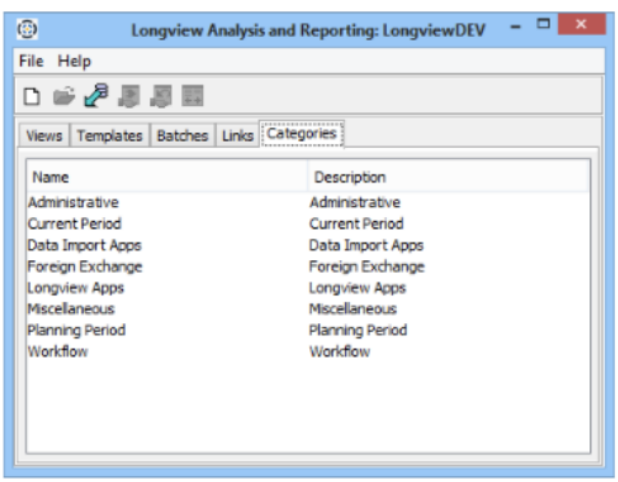
Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

Creating a category

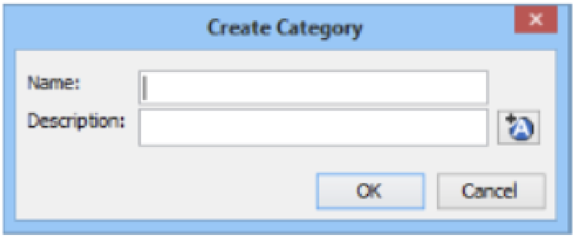
You must create a category before you can assign a template to that category.

To create a category, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the **Categories** tab. A list of categories appears.



2. Choose File > New. The Create Category dialog appears.



3. Complete the following fields:

Field	Description
Name	Enter a name for the category. You can use all characters except for the following: backslash (\ ), forward slash (/), apostrophe (’), double quotation marks (“), comma (,), left brace ({), and double brackets ([[ ) or ( ]]).
Description	Enter a description for the category. You can use all characters except for the left brace ({). To enter descriptions in alternate languages, click the A icon beside the field. The Alternate Descriptions dialog appears, enabling you to enter descriptions for other languages enabled in your system.

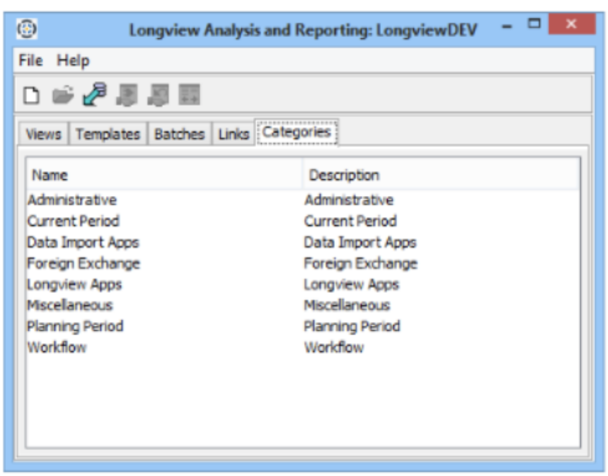
4. Click OK. The new category appears in the list of categories.

Deleting a category

If a category is no longer used, or obsolete, you can delete it.

To delete a category, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the **Categories** tab. A list of categories appears.



2. Select the category you want to delete.

3. Press the Delete key. A confirmation dialog appears.

4. Click Yes. The category is deleted.

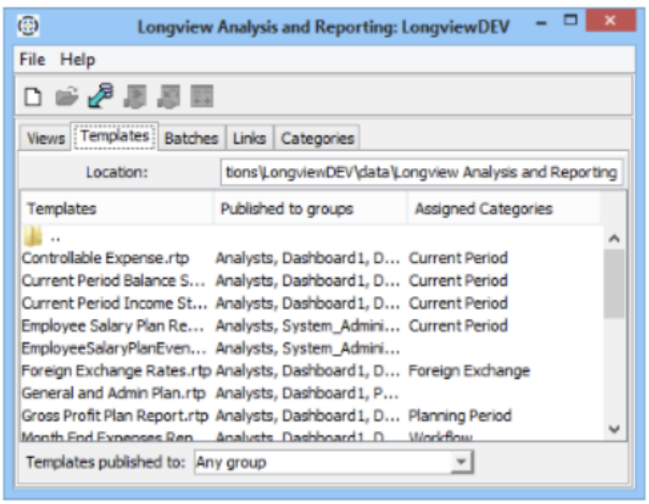
> **Note:** Deleting a category does not delete the templates that are assigned to that category.

Assigning a template to a category

To assign a report template to a category from the Longview Analysis and Reporting dialog, follow these steps.

> **Note:** A report template must be published before it can be assigned to a category. For more information on publishing report templates, see Publishing report templates.

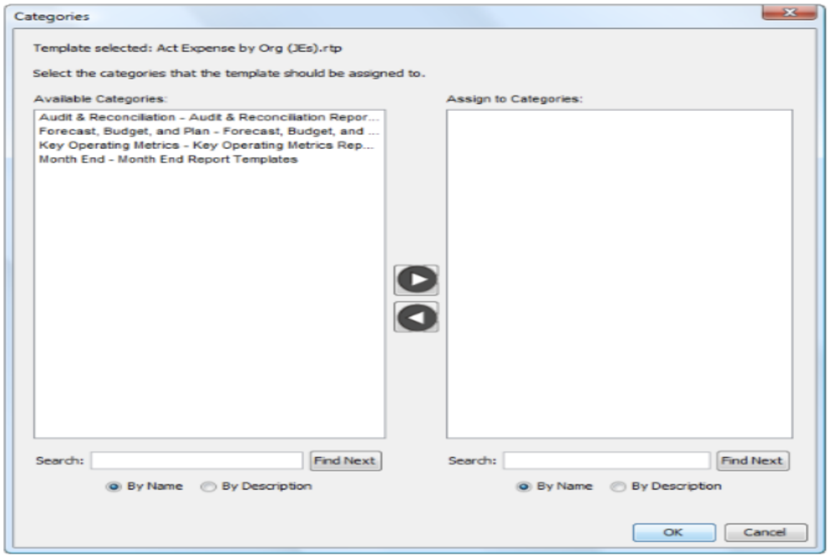
1. In the Longview Analysis and Reporting dialog, click the **Templates** tab. A list of existing report templates appears.



2. To see all your existing templates, select **Any Group** in the Templates published to field.

3. Select the template you want to assign to a category. You can select more than one template by holding down the Ctrl key while making your selections.

4. Choose File > Assign Categories. The Categories dialog appears.



5. In the Available Categories field, select the categories to which you want to assign the template, and move them to the Assign to Categories field using the right arrow button. You can select more than one category at a time by holding down the Ctrl key while making your selections.

6. Click OK. The Longview Analysis and Reporting dialog appears. The categories to which the template has been assigned appear in the Assigned Categories column.

Publishing and unpublishing report batches

To make a report batch available to other users, you need to publish it.

Publishing a report batch

Once you have created a report batch, you can publish it to the database so that other users can run the reports contained within it.

Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

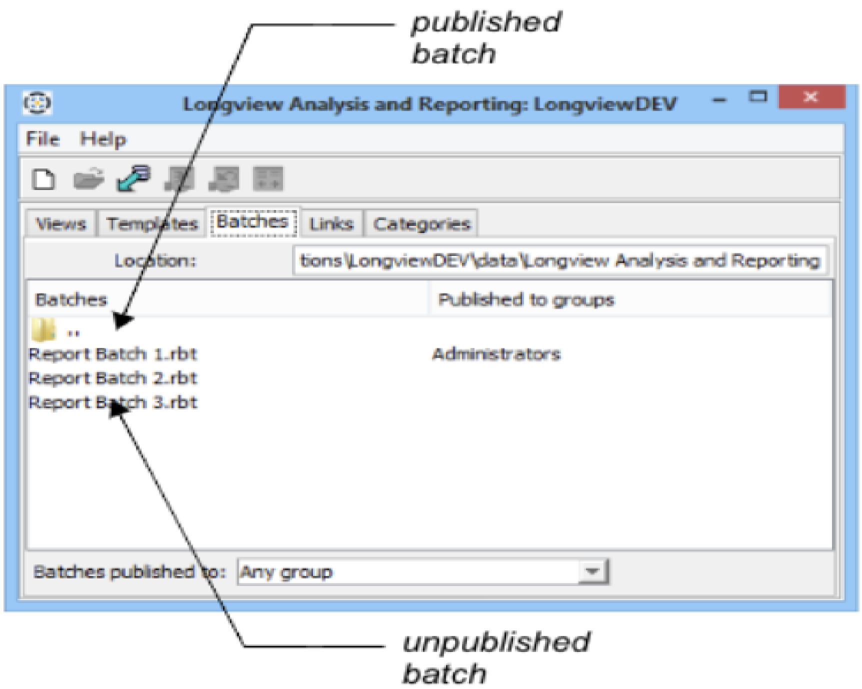
Caution: If you publish a report batch that contains errors or omissions, and your user population starts to use it, logistical issues can result if you have to modify and republish the report batch at a later time. Before publishing a report batch, be sure to test it thoroughly to ensure its completeness and accuracy.

The procedure you use differs depending on your starting point.

From the Longview Analysis and Reporting dialog

To publish a report batch from the Longview Analysis and Reporting dialog, follow these steps.

1. Open the Longview Analysis and Reporting dialog, click the Batches tab. A list of batch files appears.



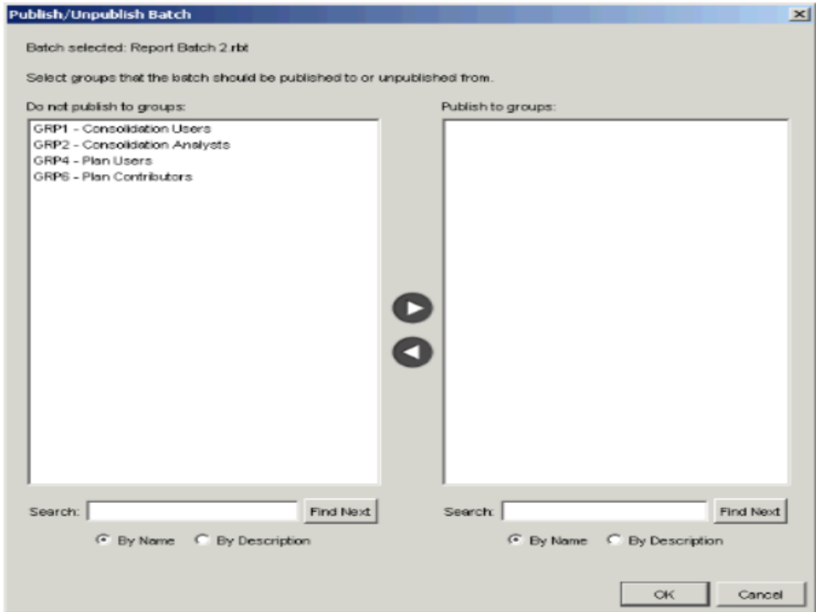
   Files are listed numerically and alphabetically. If a batch file has been published, the groups to which it has been published appear in the Published to groups column.

2. To see all your existing batch files, select **Any group** in the Templates published to field.

3. Select the batch you want to publish. You can select more than one by holding down the Ctrl key while making your selections.

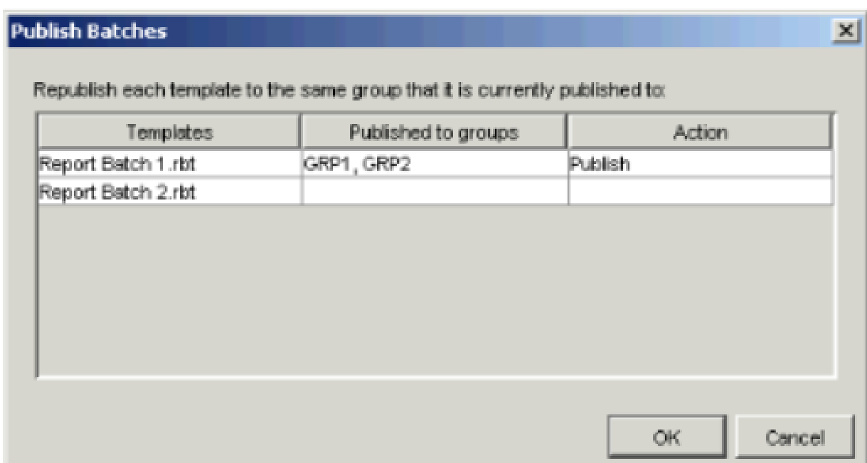
4. Choose File > Publish, and do one of the following:

   - If you selected only one batch file in step 3, or multiple batch files that were originally published to exactly the same groups, the Publish/Unpublish Batch dialog appears.



Proceed to step 5.

- If you selected more than one batch file in step 3, and those batches were originally published to different groups, the Publish Batches dialog appears listing the batches you selected, and the groups to which they were originally published.



If you are happy with these settings, click OK. The batches are published to the groups listed in the Published to groups field, and the Longview Analysis and Reporting dialog appears.

Otherwise, click Cancel. The Longview Analysis and Reporting dialog appears. Return to the beginning of this procedure.

5. In the Do not publish to groups field, select the groups to which you want to publish the batch, and move them to the Publish to groups field using the right arrow button. You can select more than one group at a time by holding down the Ctrl key while making your selections.

Note: The groups that appear in these fields represent all groups to which the Report Publisher belongs (not necessarily all groups on the application database).

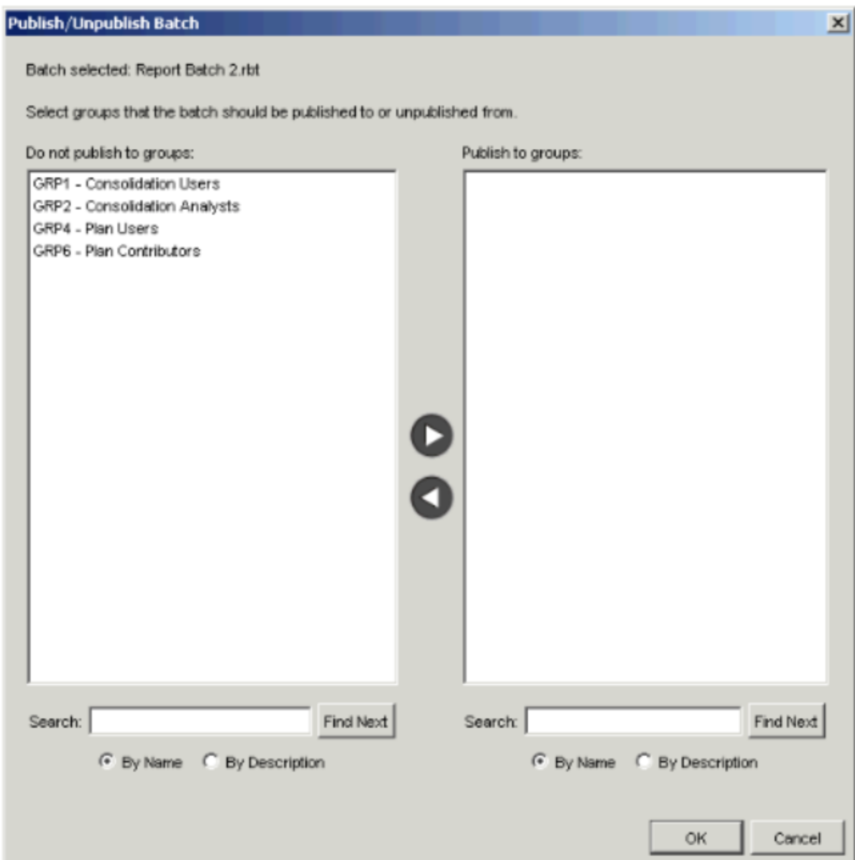
6. Click OK. The batch files you selected are published, and the Longview Analysis and Reporting dialog appears.

From the Edit Report Batch dialog

You can publish a report batch from the Edit Report Batch dialog. This can come in handy when you make changes to a report batch that has been published and want to ensure that those changes are reflected in the published version.

To publish a report batch from the Edit Report Batch dialog, follow these steps.

1. Create or open a report batch that you want to publish and make any necessary changes. Make sure you save the report batch. For more information see Creating a report batch.
2. In the Edit Report Batch dialog, choose File > Publish. The Publish/Unpublish Batch dialog appears.



3. In the Do not publish to groups field, select the groups to which you want to publish the batch, and move them to the Publish to groups field using the right arrow button. You can select more than one group at a time by holding down the Ctrl key while making your selections.

Note: The groups that appear in these fields represent all groups to which the Report Publisher belongs (not necessarily all groups on the application database).

4. Click OK. The batch is published, and the Edit Report Batch dialog appears.

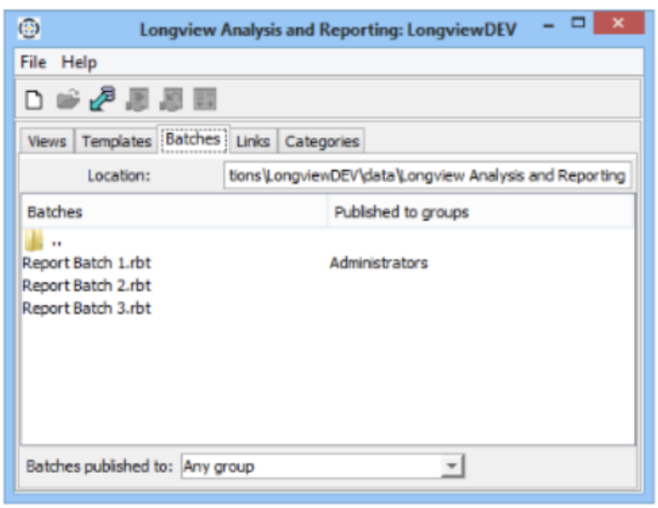
Unpublishing a report batch

You may be able to unpublish a report batch if you need to make a newer version available, or to delete it altogether.

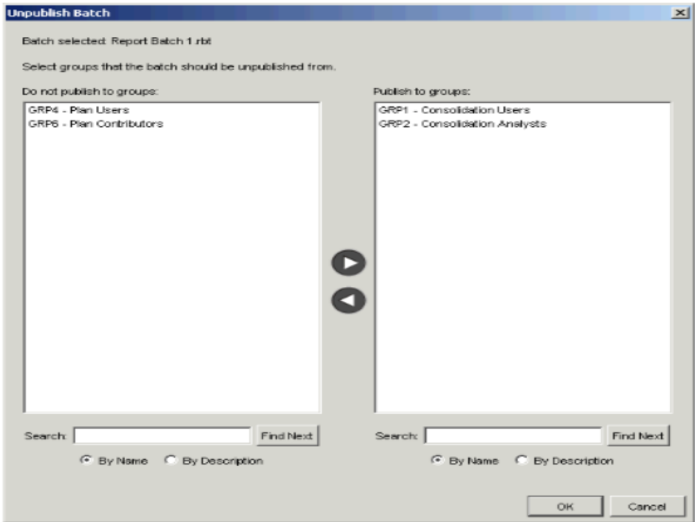
Role	Can perform this task?
Report Publisher	yes
Report Author	no
Report User	no

To unpublish a report batch, follow these steps.

1. Open the Longview Analysis and Reporting dialog, and click the **Batches** tab.

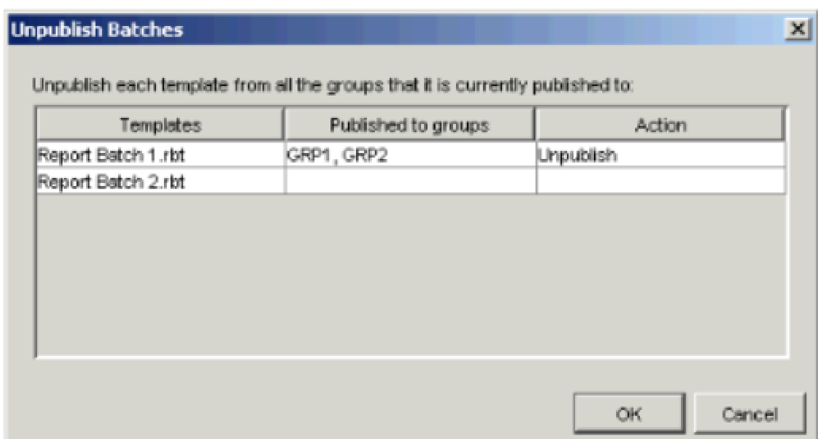


2. For Templates published to select the group to which you published the batch file that you now want to unpublish. A list of batch files published to that group appears. For a list of all batch files, select **Any group**.
3. Select the batch file you want to unpublish. You can select more than one by holding down the Ctrl key while making your selections.
4. Choose File > Unpublish, and do one of the following:
   - If you selected only one batch file in step 3, or multiple batch files that were originally published to exactly the same groups, the Unpublish Batch dialog appears.



Proceed to step 5.

- If you selected more than one batch file in step 3, and those batch files were originally published to different groups, the Unpublish Batches dialog appears listing the templates you selected, and the groups to which they were originally published.



If you are happy with these settings, click OK. The batch files are unpublished from the groups listed in the **Published to groups** field, and the Longview Analysis and Reporting dialog appears.

Otherwise, click Cancel. The Longview Analysis and Reporting dialog appears. Return to the beginning of this procedure.

5. In the Publish to groups field, select the groups from which you want to remove access to the batch file, and move them to the Do not publish to groups field using the left arrow button. You can select more than one group at a time by holding down the Ctrl key while making your selections.

> **Note:** The groups that appear in these fields represent all groups to which the Report Publisher belongs (not necessarily all groups on the application database).

6. Click OK. The Longview Analysis and Reporting dialog appears.

Working With Charts

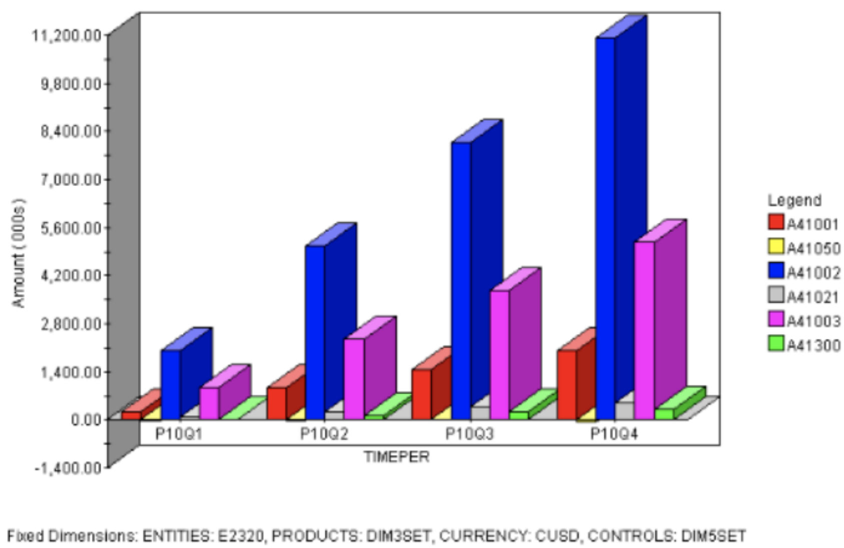
Using the available chart formats, you can find many different ways in which to view data in a graphical format.

Chart formats

You can view data in several types of chart formats.

Bar chart

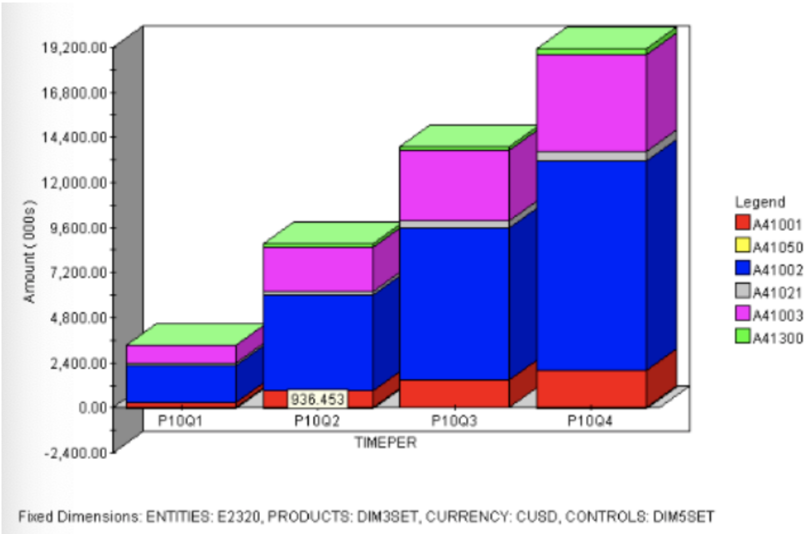
A bar chart is a chart in which vertical bars along the horizontal axis represent the value of each symbol in the down dimension, for each symbol in the across direction.



If you want, you can reverse the orientation of the axes. For more information, see step 8.

Stacking bar chart

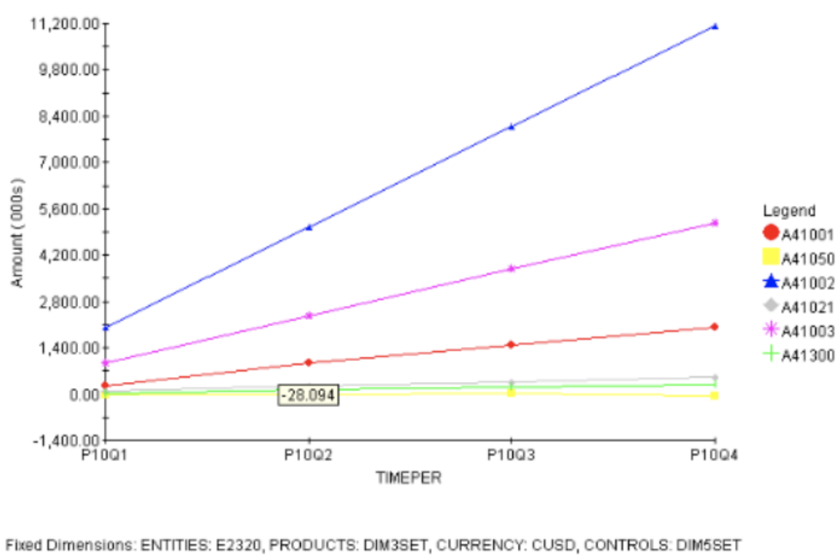
A stacking bar chart is a chart in which each bar represents the total “stacked” value of the symbols in the ***down dimension*** (as listed in the legend) for each symbol in the across direction. Each symbol is shown in proportion to its share of the total value.



If you want, you can reverse the orientation of the axes. For more information, see step 8.

Line chart

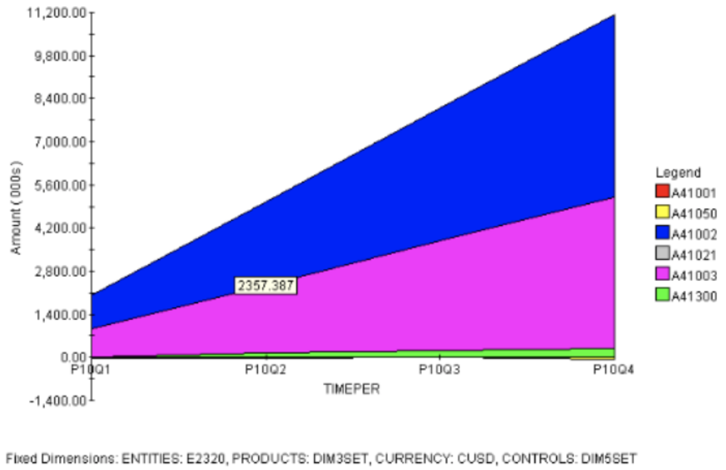
A line chart is a chart in which the value for each symbol in the down direction is plotted for each symbol in the across direction. The points for each symbol are then connected with a line to show a trend.



If you want, you can reverse the orientation of the axes. For more information, see step 8.

Area chart

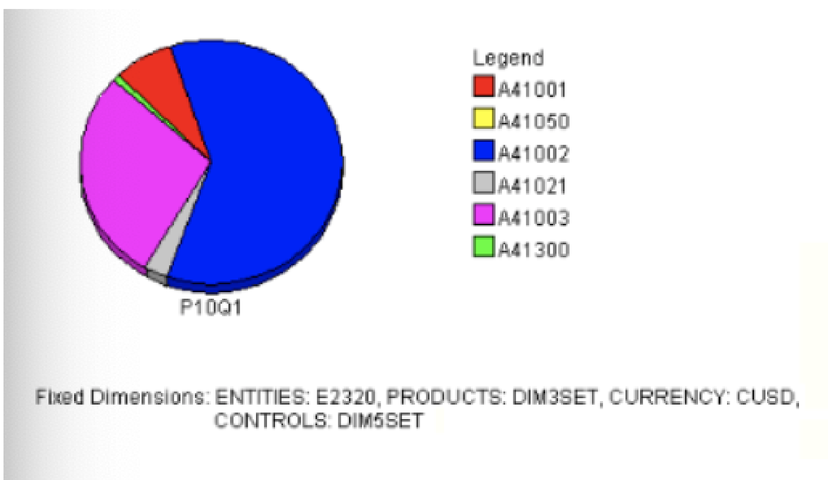
An area chart is similar to a line chart in that each point, representing the value of each symbol in the ***down dimension***, connects to the others with a line. In an area chart, however, the area below the line is filled to give the value greater visibility. The horizontal axis is the range of symbols in the across direction. Symbol values are placed one on top of the other, each symbol's value starting at 0 on the horizontal axis.



If you want, you can reverse the orientation of the axes. For more information, see step 8.

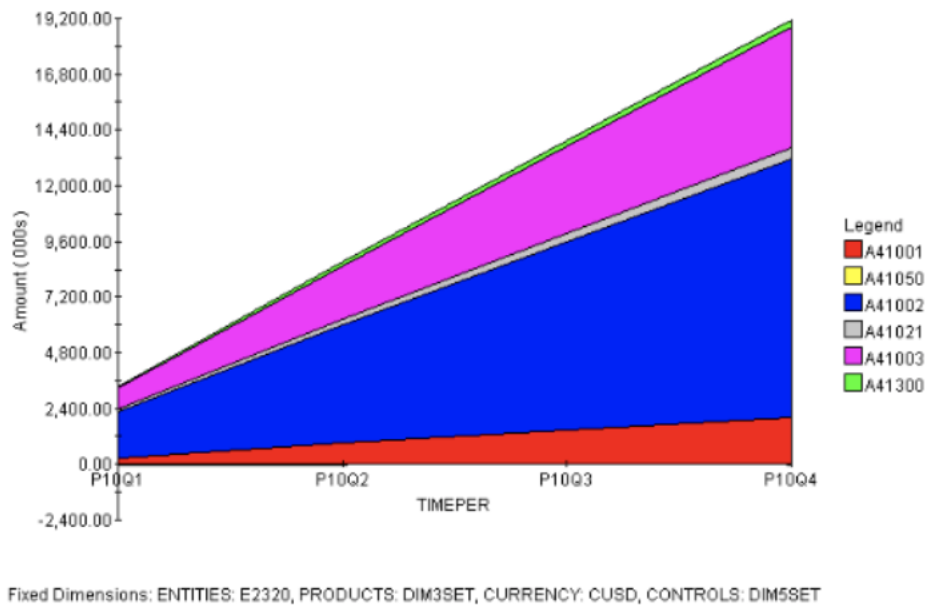
Pie chart

A pie chart is a chart in which each symbol in the ***down dimension*** appears as a sector of a circle, in proportion to its share of the total parent value (the total value of the pie). When you view data in pie chart format, you see one pie for each symbol in the across direction.



Stacking area chart

A stacking area chart is similar to a pie chart in that the values of the symbols in the ***down dimension*** are shown in proportion to their share of the total value of the symbols as a whole. In a stacking chart, however, the values are stacked on top of each other. The horizontal axis is the range of symbols in the across direction.



If you want, you can reverse the orientation of the axes. For more information, see step 8.

Viewing data in alternate formats

The default format for viewing data is report format. Depending on your responsibilities, you may be able to switch back and forth between report and chart format.

Switching to chart format

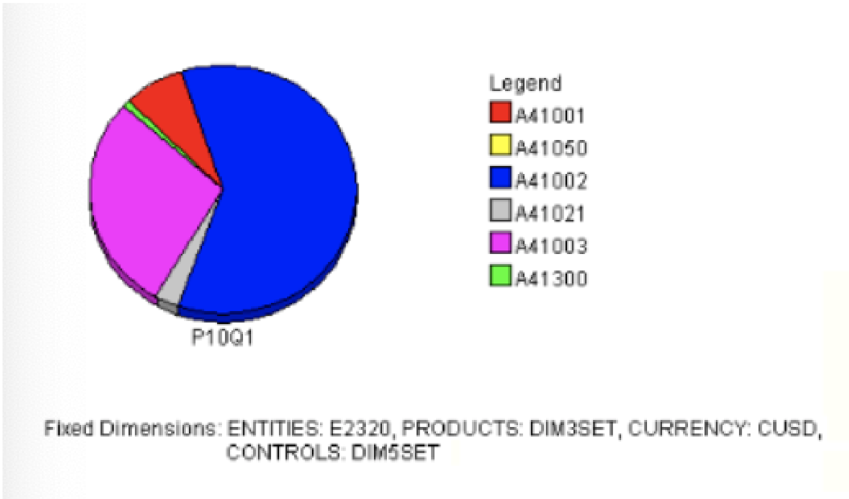
Depending on your role and the properties of the template, you may be able to view data in chart format.

To view data in chart format, follow these steps.

1. Specify the orientation and symbols as required.

> **Note:** Make sure only one dimension appears in each of the down and across directions. Otherwise, the chart does not run.

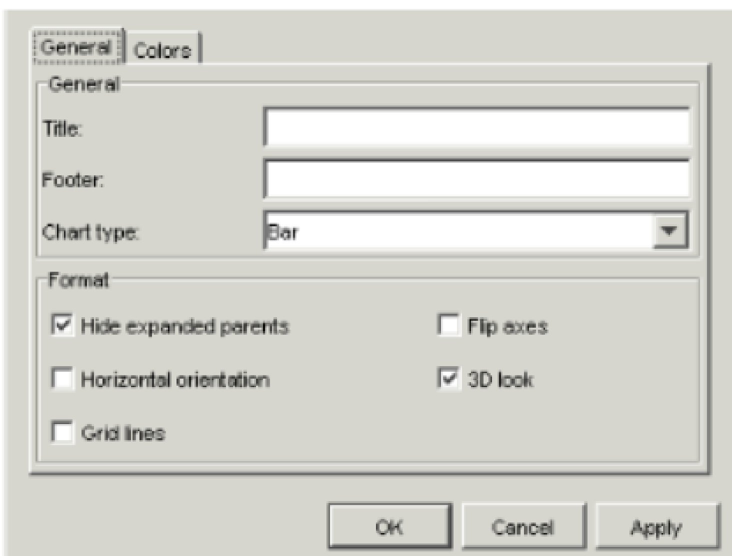
2. In the toolbar, choose View > Chart. The data appears in chart format.



3. To switch back to report format, choose View > Normal.

4. To zoom in on a specific area of the chart, left click on the area. To zoom out again, right-click anywhere in the chart.

5. When the data appears in chart format, choose Format > Chart Preferences. The Chart Preferences dialog appears, with the **General** tab in view.



6. Complete these fields:

Field	Description
Title	Type a title for the chart.
Footer	Type the text for the footer of the chart.

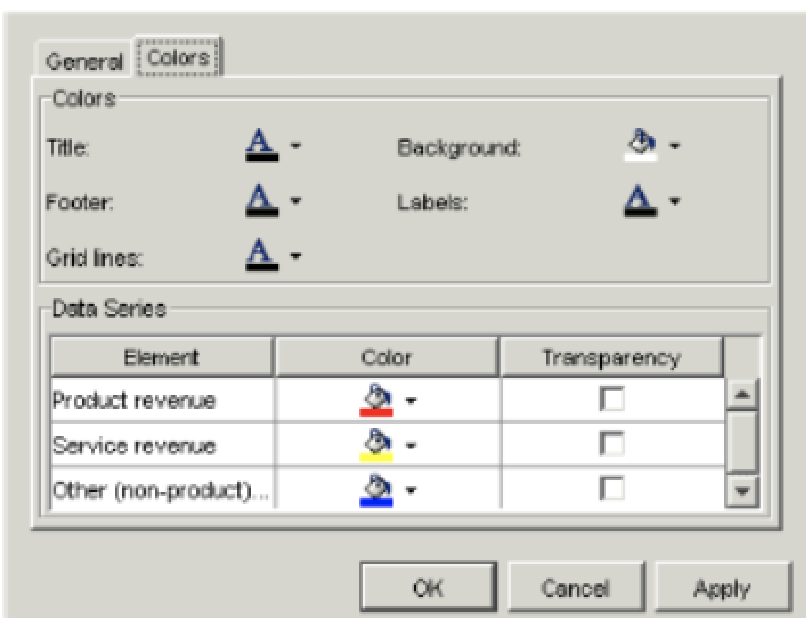
7. Select a chart type:

Field	Description
Line	To view the chart in line format. For more information, see Line chart.
Pie	To view the chart in pie format. For more information, see Pie chart.
Bar	To view the chart in bar format. For more information, see Bar chart.
Stacking Bar	To view the chart in stacking bar format. For more information, see Stacking bar chart.
Area	To view the chart in area format. For more information, see Area chart.
Stacking Area	To view the chart in stacking area format. For more information, see Stacking area chart.

8. Complete these fields:

Field	Description
Hide expanded parents	To hide the parent symbol in an expanded hierarchy.
Horizontal orientation	To display the chart horizontally.
Grid lines	To include grid lines in the chart.
Flip axes	To switch the position of the axes in the chart. For example, if the chart shows ACCOUNTS down and TIMEPER across, select this field to switch them.
3D look	To display the chart in three-dimensional format.

9. Click the **Colors** tab.



10. Complete these fields:

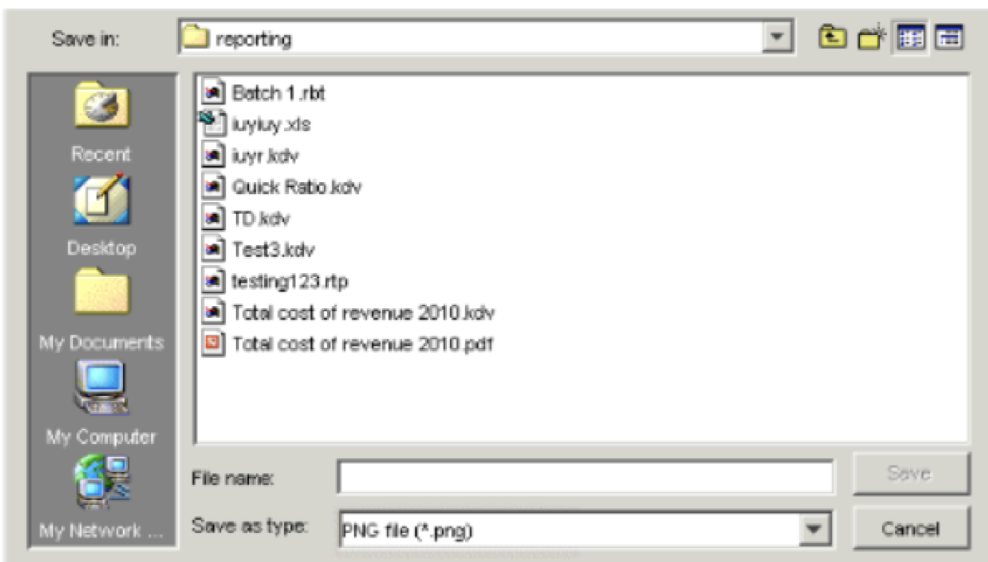
Field	Description
Title	Select a color for the title.
Footer	Select a color for the footer.
Grid lines	Select a color for the grid lines.
Background	Select a color for the background.
Labels	Select a color for the chart’s labels.

11. For the **Data Series** section, you can select a color for each symbol in the ***down dimension*** of the chart. To make the color for a symbol transparent, so that you can see the symbols behind it, select **Transparency**.

12. Click Apply to see changes before exiting this dialog.

13. When you are finished, click OK. The data appears in chart format.

14. To save the chart as a graphic file, select File > Save Chart As. The Save dialog appears.



15. Complete these fields:

Field	Description
Save in	Select the folder in which you want to save the chart.
File name	Type a name for the file.
Save as type	PNG file (*.png) is automatically selected.

16. Click Save. The data appears in chart format.

Switching to report format

If you were able to make data appear in chart format, you can switch it back to report format. To switch back to report format, choose View > Normal.

Working With Reports

You can use reports to view, print, and interact with the data in your system.

Understanding reporting roles

The following table outlines the three standard reporting roles:

Reporting role	Tasks
Report User	Uses the reports created by the Report Publisher to analyze data and run reports.
Report Author	Creates and formats own reports for analysis.
Report Publisher	Sets the general content, criteria, and format of the report templates that Report Users use to analyze data and run reports.

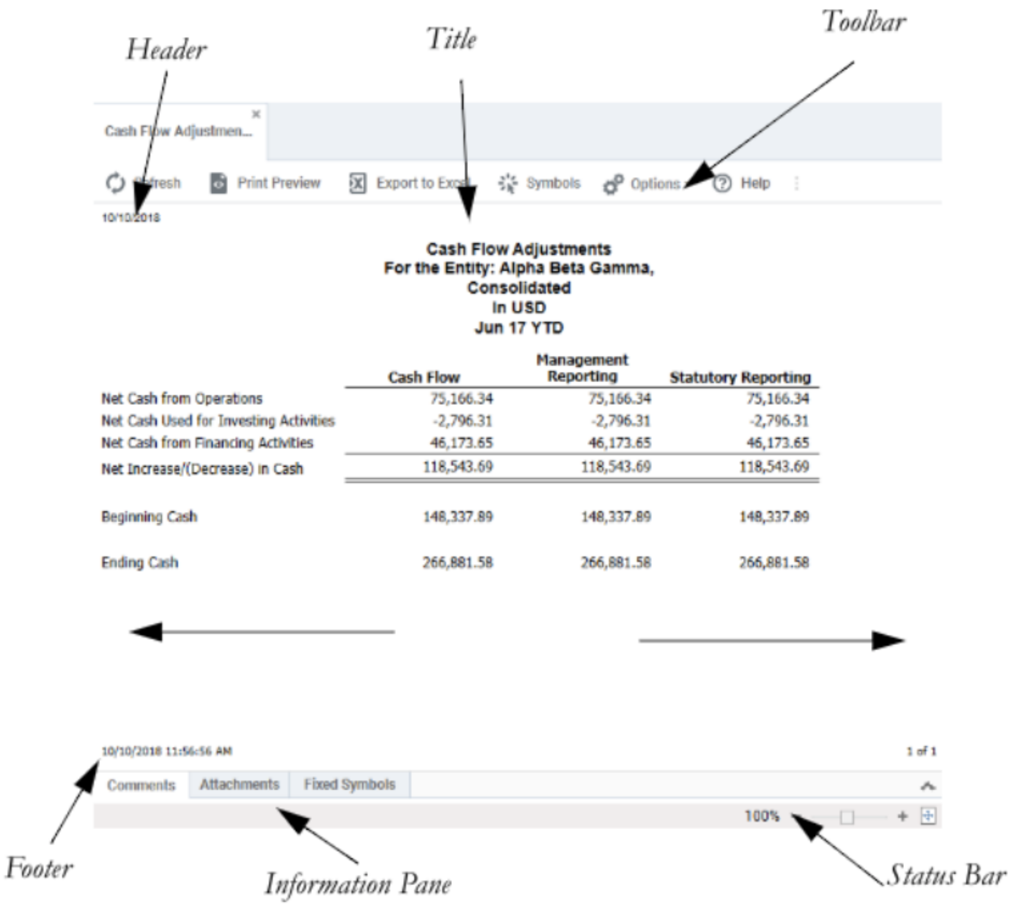
Depending on your assigned reporting role and access, you may be able to perform different tasks when working with reports. The following table outlines the tasks you can perform:

Task	Report User	Report Author	Report Publisher
Reorienting dimensions	Report Users can reorient any dimension that is not frozen.	Report Authors can reorient all dimensions.	Report Publishers can reorient all dimensions.
Selecting symbols in frozen dimensions	Report Users cannot select symbols for frozen dimensions.	Report Authors can select symbols for frozen dimensions.	Report Publishers can select symbols for frozen dimensions.
Navigating hierarchies	If the report is configured with Drillable dimensions, Report Users can drill into the symbol hierarchies in dimensions in the selected report	Report Authors can drill into all hierarchies.	Report Publishers can drill into all hierarchies.
Viewing available symbols	If the report is configured with Restricted symbols, Report Users can view symbols only under the specified hierarchies. If the report is not configured with Restricted symbols, Report Users can view symbols to which they have access.	Report Authors can view all symbols to which they have access in the dimension.	Report Publishers can view all symbols to which they have access in the dimension.

Understanding reports and their features

Reports contain many navigational elements that make it easy for you to view, print, and interact with data.

The main page of a report displays the report body. From there, you can navigate to the Print Preview page, the Symbols page, the Longview Report Viewer Help, or you can export the report to Microsoft Excel.



Some of the interface elements you may see in reports include:

Headers and footers Depending on the way the report was configured, headers and footers may appear at the top and bottom of the report, respectively. Report Publishers can include supplemental information about the report in the header and footer. Headers and footers can appear anywhere along the top and bottom of the report.

Title Depending on the way the report was configured; reports may contain a title. Reports can have left, center, or right titles. Titles appear above the data.

Toolbar Reports include a toolbar. Depending on the page you are on, the buttons that appear on the toolbar vary.

Button	Description
Refresh	Click the Refresh button to update all information in the current view.
Print Preview	Click the Print Preview button to go to the print preview page.
Export to Excel	Click the Export to Excel button to export the report to Microsoft Excel.
Symbols	Click the Symbols button to go to the Symbols page.
Options	Click the Options button to toggle Conditional Displays.
Help	Click the Help button to open Help related to reports.

Report body The report body is the main area of the report containing the data. Depending on the way the report was configured, you may see highlighting or shading.

Information pane The information pane appears at the bottom of the report on the main page. When you first open a report, the information pane is collapsed. The information pane contains the Comments tab, the Attachments tab, and, depending on the way the report was configured, the Fixed Symbols tab. You can expand the pane to view Comments, Attachments, and Fixed Symbols on each respective tab.

Status bar The status bar appears along the bottom of the report and the contains the Zoom Out, Zoom In, and Zoom to Default magnification options.

Understanding report status

If your System Administrator has configured Data Area Monitoring, reports display status in a status bar. The status bar appears at the top of the report and contains information regarding the status of the report. Use the following table to review possible status messages:

Message	Description
A submission failed An event failed	A submission or event failed in the system. The failed item may impact the data in the report. You can review the failed item using the User Submissions tool or the Events tool.
A submission is in progress An event is in progress A submission and an event are in progress	A submission, an event, or both are in progress in the system. The in-progress item may impact the data in the report. You can click Refresh to update the status of the report or review the in-progress item using the User Submissions tool or the Events tool.

Message	Description
(no message)	You may not see a status message because your System Administrator may not have configured Data Area Monitoring. The Data Area Monitoring, Data Area Monitoring Dimensions, and Data Area Status Dimension configuration parameters must be set in Longview Server Manager. For more information, see the Longview Server Manager Guide. You can proceed to analyze data or print the report.

Viewing version information

It may be useful at times to view version information about your Longview system. You can verify the version information for Report Viewer from reports launched from your Longview Dashboard.

To view version information:

1. From a report opened with Report Viewer, press Ctrl + F1. The About Longview dialog opens.
2. Review version information for the following:
   - Longview Report Viewer
   - Web Bridge
   - Data Server

   Note: To copy version information to your Windows clipboard, click Copy info to clipboard.
3. When you are finished, click OK to close the About Longview dialog.

Opening reports

You can open reports from the following locations, depending on the setup of your system and the products you have purchased:

- Longview Dashboard — Reports to which you have access are available from your Dashboard. You may see reports in the preconfigured Report Templates panel, or you may see reports in a panel customized by your administrator.
- Longview Client — Reports to which you have access are available from the Reports category of the Tax Provision navigation pane.

To open a report from your Longview Dashboard:

1. On your Longview Dashboard page, click the link to the report you want to open. Depending on the way the report was configured, one of the following occurs:
   - The report opens in a new window. You can analyze the data and print the report.
   - The Symbol Selection page appears, showing the dimensions for which, you must select symbols. Proceed to step 2.

2. For each dimension that appears, type a symbol name, or select a symbol. To add more than one symbol for a dimension, select a row containing the dimension for which you want to add another symbol and click Symbol.

   Note: You can select only one symbol for fixed dimensions. If the Symbol button is unavailable, the dimension is fixed. Depending on your role access, you may be able to modify dimension orientation. For more information, see Modifying dimension orientation.

3. When you are done selecting symbols, click View Report. The report opens.

To open a report from Longview Client:

1. In the Longview Client navigation pane, click the category (Reports or Administration) containing the report you want to open.
2. Expand the section containing the report and click the report. Depending on the way the report was configured, one of the following occurs:
   - The report opens in the workspace. You can analyze the data and print the report.
   - The Symbol Selection page appears in the workspace, showing the dimensions for which, you must select symbols. Proceed to step 3.
3. For each dimension that appears, type a symbol name, or select a symbol.

   Note: If you are opening multiple reports using the same entity selection, you can specify the relevant entity for each category in the navigation pane.

4. When you are done selecting symbols, click View Report. The report opens.

Modifying symbol options

Depending on your access and the properties of the report, you may be able to modify symbol selections, add symbols, remove symbols, reorder symbols, display symbol names or descriptions, and modify the dimension orientation of the report.

For information on the actions you can perform based on your role, see Understanding reporting roles.

Modifying symbol selections

Depending on your access and the properties of the report, you may be able to change the symbols in the report. For more information on the actions you can perform based on your role, see Understanding reporting roles.

To modify a symbol selection:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Click Symbols. The Symbols page displays.
3. In the Symbol Selection section for each symbol selection, you want to modify, type an alternate

symbol name, or select an alternate symbol.

4. When you are finished, click View Report.

Adding symbols

Depending on your access and the properties of the report, you may be able to add symbols to the report. You can add symbols for the dimensions in the across and down orientation only. If you want to include more than one symbol in a fixed dimension, you must first reorient the dimension into the across or down orientation. For more information, see Modifying dimension orientation.

To add a symbol:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Click Symbols. The Symbols page displays.
3. In the Symbol Selection section, select the row below which you want to add the new symbol.
4. Click Symbol. The new row appears.
5. Type the name of a symbol or use the symbol selector to select a symbol.
6. When you are finished, click View Report.

Removing symbols

Depending on your access and the properties of the report, you may be able to remove symbols. You can remove symbols for the dimensions in the across and down orientation only, which can contain multiple symbols. Fixed dimensions must have only one symbol.

To remove a symbol:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Click Symbols. The Symbols page displays.
3. In the Symbol Selection section, select the row containing the symbol you want to delete.
4. Click Delete. The symbol is removed.
5. When you are finished, click View Report.

Reordering symbols

Depending on your access and the properties of the report, you may be able to reorder symbols. You can reorder symbols in the down and across orientation only. Fixed dimensions can have only one symbol.

To reorder a symbol:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Click Symbols. The Symbols page displays.
3. In the Symbol Selection section, select the row containing the symbol you want to reorder.

4. Click Move Up or Move Down.
5. When you are finished, click View Report.

Displaying symbol names and descriptions

Depending on the way the report was configured, you may see symbol names, symbol descriptions, or both symbol names and symbol descriptions displayed for each dimension when you open the report. Depending on your role, you may be able to modify these options. Active dimensions must display at least one of either the symbol name or symbol description. Both the symbol name and symbol description can be cleared for fixed symbols, but this removes the dimension from the list of fixed symbols if fixed symbols display for the report.

> **Note:** Symbol name and description display options also apply to printed pages and exported reports.

To display symbol names and descriptions:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Click Symbols. The Symbols page appears.
3. In the Symbol Selection section for each dimension, select whether to display symbol Names, Descriptions, or both. To display symbol Names or Descriptions for all active dimensions, use the appropriate Select All check box.

   > **Note:** If the report Publisher has configured the report to not display fixed symbols, you cannot change the display options for fixed dimensions.

4. Click View Report. The report appears with the specified display options.

Modifying dimension orientation

Depending on your access and the properties of the report, you may be able to modify the dimension orientation of the report. For information on the actions you can perform based on your role, see Understanding reporting roles. Dimensions are listed on the Symbols page in the order defined by the Report Publisher.

Use the following table to determine the way dimensions display in the report.

Dimension orientation	Report appearance
Across or Down	The left-most dimension listed on the Symbols page is the outermost dimension in the report.
Fixed	If the report Publisher configured the report to display fixed symbols, the report opens displaying fixed symbols in dimension order on the Fixed Symbols tab of the information pane. If you modify the dimension orientation of fixed symbols, the right-most dimension appears at the top of the list of fixed dimensions on the Fixed Symbols tab of the information pane, followed by the other dimensions in the order listed on the Symbols page.

To modify dimension orientation:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Click Symbols. The Symbols page appears.
3. In the Orientation section for the dimension you want to reorient, select the dimension.
4. Drag and drop the selected dimension into the desired position.
5. When you are finished, click View Report.

Viewing fixed symbols

Depending on the way the report was configured, you may be able to view fixed symbols. Fixed symbols appear on printed pages if they are displayed on the Fixed Symbols tab of the information pane. For information on the way fixed symbols display on printed pages, see Understanding printed pages.

Note: The Report Publisher may have configured the report to not display fixed symbols. If this is the case, the Fixed Symbols tab does not display.

To view fixed symbols:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. In the information pane, click Fixed Symbols. The Fixed Symbols display.
3. Review the symbols for each fixed dimension.

Note: Depending on your role and access, you may be able to make a dimension active. For more information, see Modifying dimension orientation.

Navigating reports

If the report is configured with Drillable dimensions, you may be able to modify the level of symbol detail to display in a report.

Navigating hierarchies

Depending on the symbols selected and the dimension orientation of the report, you may be able to quickly collapse or expand a hierarchy with one click or you may be able to collapse or expand hierarchies to specified levels of detail by right-clicking.

Use the following table to determine the level to which you want to expand or collapse a specified hierarchy using the right-click menu.

Right-click menu option	Behavior
Collapse All	All hierarchies in the selected dimension collapse.
Collapse Parent	The selected parent collapses.
Expand All for Selected Symbol	The hierarchy expands to display all symbols within the selected parent symbol but for only the selected occurrence of the selected parent symbol. Other occurrences of the parent symbol do not expand.
Expand One Level for All Occurrences	The hierarchy expands to display only the first level of symbols under the selected parent symbol for all occurrences of the selected parent symbol.
Expand One - Match Inner Detail	This option applies to reports which include multiple dimensions in the across or down orientation. This option is available for outer dimension symbols only. The outer dimension hierarchy expands one level and for each outer dimension child symbol, the inner dimension expands to match the inner dimension expansion of the parent symbol.
Expand All - Match Inner Detail	This option applies to reports which include multiple dimensions in the across or down orientation. This option is available for outer dimension symbols only. The outer dimension hierarchy expands to display all symbols and for each outer child symbol, the inner dimension expands to match the inner dimension expansion of the parent symbol.
Expand All for All	The hierarchy expands to display all symbols in all the dimensions in a selected orientation (across or down). **Note:** Use this option with caution. Depending on the size of the report and the number of symbols, the Expand All for All option may adversely affect the performance of your system.

To navigate a hierarchy:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Do one of the following:
   - To determine whether a symbol can be quickly expanded or collapsed, move the mouse over a symbol. If the symbol can be expanded or collapsed, a hand appears, and a tooltip displays that reads “Click to Expand” or “Click to Collapse.” Proceed to step 3.
   - To display a specific level of detail, right-click the symbol for which to expand or collapse the hierarchy. The relevant menu options appear. Proceed to step 4.
3. Click the symbol. The symbol expands or collapses one level as indicated.
4. Select the relevant navigation option. The report hierarchy expands or collapses appropriately.

Changing magnification

You can change the magnification of a report to suit your preference for your screen. Modifying the magnification of a report applies to the current session view only and not the way the report is printed or exported.

Zooming in and zooming out

You can modify the magnification of a report from 10% to 200%.

To zoom in or zoom out:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Depending on the way you want to modify the magnification, do one of the following:
   - To increase the magnification of the report, click Zoom In on the status bar. The report magnification increases by 1%. Alternatively, you can drag the slider to the desired magnification level.
   - To decrease the magnification of the report, click Zoom Out on the status bar. The report magnification decreases by 1%. Alternatively, you can drag the slider to the desired magnification level.

> **Note:** For information on a multi-page view of the report, see Working with printing.

Restoring magnification defaults

If you have modified the magnification of a report, you can restore the report to the default view of 100%.

To reset the magnification of the report to default, click Restore to default zoom level on the status bar. The report magnification returns to 100%.

Enabling and disabling conditional displays

Depending on the way the report was configured, the data may have highlighting, filters, and symbol suppression visible when you open the report. You can enable or disable these conditions. Preconfigured Tax Provision reports may open with suppressed symbols containing only zero values.

Note: Conditional display applies to the way data appears on printed pages. Filters and symbol suppression apply to the way a report appears in Microsoft Excel.

To enable or disable conditional display:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Click Options. The Options menu appears.
3. Depending on the initial view of the report, select, or clear **Apply Conditional Display** to enable or disable highlighting, filters, and symbol suppression.

   Note: If the report Publisher has not applied any conditional displays to the report, Apply Conditional Display is unavailable.

Viewing additional information through links

The report Publisher may have included additional information about the report. You may be able to view this additional information through a web link, or to an external document such as a PDF file. Reports can contain the following types of links:

Link type	Description and access
Cell-level	Cell-level links resolve to an external URL to provide information relevant to a particular cell. You can access cell-level links by right-clicking any cell in the report except calculated cells or blank cells.
Report-level	Report-level links resolve to an external URL providing information relevant to the report as a whole. You can access report-level links by right-clicking anywhere in the report.

To view additional information:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Do one of the following:
   - To view cell-level links, right-click the cell in which you want to view additional information. A menu opens, displaying any relevant cell links.
   - To view report-level links, right-click anywhere in the report. A menu opens, displaying any relevant report links.
3. Select the link for which you want to view additional information. The related URL or document opens.

Reviewing Audit Trail

Depending on the configuration of the report you may have access to review audit trail. Audit trail is accessed using a link.

For further information on links, see Viewing additional information through links.

To access audit trail:

1. Right-click in the report.
2. Select Audit
3. Audit Trail appears:
   - As a tab, if report is opened in Longview Client.
   - As a new window if report is opened in Report Viewer.
4. All related audit transactions are displayed in the table.
   - Including changes made on leaf symbols if the report or intersection contains parent symbols.

> **Note:** If the intersection selected only contains calculated data, such as in a translated currency, not audit data will be available as data changes are only tracked for submissions.

For more information, see “Reviewing Data Audit” in the *Solutions User Guide.*

Refreshing report data

You can update the contents of the report you are working with to make sure you are viewing the most recent data and report status.

> **Note:** Comments and attachments refresh only when the information pane is expanded and the Comments tab or Attachments tab is in focus.

1. To refresh the contents of a report with data from the database, click Refresh.

   > **Note:** You can also press F5 on the keyboard to refresh the report.

Working with comments and attachments

Comments explain entries in reports. Attachments contain supplementary information about reports. If the intersection for a comment or attachment is visible in the report body, the comment or attachment appears in the information pane. From the information pane, you can view comments and attachments, and open and save attachments.

For information on the way comments and attachments print, see Understanding printed pages.

Understanding the information pane

The information pane displays the Comments, Attachments, and Fixed Symbols tabs. You may not see the Fixed Symbols tab based on the way the Report Publisher has set up the report.

Note: Comments and attachments are not supported for Schedule reports. If you are working with a Schedule report, the Comments tab and Attachments tab do not display in the information pane.

For comments and attachments, the information pane displays the following information for each comment or attachment:

- the data intersection for the comment or attachment listed by dimension
- the user who submitted the comment or attachment
- the date and time of the submission
- the comment text or attachment link

Reviewing comments or attachments

You can review the list of comments or attachments based on the expansion state of symbols in the report.

To review comments or attachments:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Click the Comments tab or Attachments tab. The information pane expands, displaying the list of comments or attachments in view in the report.
3. To find all comments or attachments associated with the report, modify the expansion state of the symbols in view in the report. For more information, see Navigating reports.

Opening and saving attachments

From the information pane, you can open and save attachments.

To open and save an attachment:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. In the information pane, click the Attachments tab. The information pane expands, displaying all attachments visible in the report.
3. In the Attachment column, click the link for the attachment you want to open.
4. Do one of the following:
   - To open the attachment, click Open. The attachment opens.

     Note: You must have the appropriate program installed on your local machine to open attachments. If you do not have an appropriate program installed, you are prompted to either locate a program or save the file.

   - To save the attachment, click Save. The Save As dialog opens. Browse to the location to which to save the file and click Save. The file is saved to the specified location.

Reviewing underlying comments

Depending on the configuration of the report you may have access to review underlying comments. Underlying comments are accessed using links. For further information on links, see Viewing additional information through links.

Note: All out of box reports are configured with the ability to access underlying comments.

To review underlying comments:

1. Right-click in the report.

   Note: If you right-click on a data value, you will have the option of choosing underlying comments for the intersection or report. If you-right-click elsewhere you will have only the option of underlying comments for the report.

2. Select the appropriate Underlying Comments option.
3. Show Comments appears:
   - As a tab, if report is opened in Longview Client.
   - As a new window if report is opened in Report Viewer.
4. All related underlying comments are displayed in the table.
   - Including comments made on leaf symbols if the report or intersection contains parent symbols.
   - Including comments made in source currencies if the report or intersection contains a reporting currency.

For more information, see “Reviewing Comments” in the *Solutions User Guide*.

Working with reports in Microsoft Excel

You can export reports to Microsoft Excel.

Exporting reports to Microsoft Excel

You can export reports to Microsoft Excel. To review the way a report exports to Microsoft Excel, see Understanding reports in Microsoft Excel. Before you export a report, make sure the report displays the way you want it to, including the following items:

- Symbol names and descriptions. For more information, see Displaying symbol names and descriptions.
- Filters and symbol suppression. For more information, see Enabling and disabling conditional displays.
- Expansion state of symbols. For more information, see Navigating hierarchies.

To export a report:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Click Export to Excel. The Export to Excel dialog appears.
3. Select one of the following:

Field	Description
As displayed	To display data in the Excel worksheet using the orientation as displayed in the report. To understand the way a report appears in Report Viewer and in Microsoft Excel in As displayed format, proceed to Understanding reports in Microsoft Excel.
In table format	To display data in a table format. This format is better suited if you plan to use the data to create PivotTable reports in Excel. The data is exported with symbol names in columns (one column per dimension), followed by a column containing the values. The following formatting is carried over to the export: ▪ Symbols names/descriptions (as selected in the report) ▪ Conditional displays ▪ Number formatting ▪ Scaling

4. Click Export. The Save As dialog opens.
5. Navigate to the location where you want the file to be saved.
6. Type a name for the file.

   Note: The default name for the file is reportname.xlsx.

7. Click Save. The file opens in Microsoft Excel.
8. To review the differences between the way a report appears in Report Viewer and in Microsoft Excel in ***As displayed*** format, proceed to Understanding reports in Microsoft Excel.

Understanding reports in Microsoft Excel

Reports exported in ***As displayed*** format to Microsoft Excel will have slight formatting differences. Use the following table to review the way report features export in “As displayed” format.

Feature	In the report...	In Microsoft Excel...
Report name	The report name displays in the title bar.	The report name displays as the worksheet name. If the report name is longer than 31 characters, the first 31 characters display and the remaining characters truncate.
Titles	The Report Publisher may have configured the report to contain a title in any or all of the left, center, and right positions.	Left, center, and right titles display in cells A1, B1, and C1, respectively. Formatting for titles is not carried through to the exported report. **Note:** Column width is dictated by row headers, column headers, and data, not title length.
Headers and Footers	The Report Publisher may have configured the report to contain headers and footers in any or all of the left, center, and right positions.	Up to 255 characters are displayed for the sum of left, center, and right header and footer text. Formatting for headers and footers is not carried through to excel. **Note:** Headers and footers are visible only in Print Preview and Page Layout View in the exported report.
Symbol names and/or descriptions for active dimension	Depending on the selections on the Symbols page, you may see symbol names, symbol descriptions, or both symbol names and descriptions displayed for active dimensions.	Symbol name and symbol description selections are carried through to exported reports. If the report displays both a symbol's name and description for an active dimension at the time of export, the symbol name and symbol description are exported to the same cell and separated by a dash.
Fixed Symbols	If the Report Publisher has configured the report to display Fixed Symbols, Fixed Symbols display on the Fixed Symbols tab in the information pane. If the Report Publisher has configured the report to hide Fixed Symbols, the Fixed Symbols tab does not display in the report.	If the Report Publisher has configured the report to display Fixed Symbols, Fixed Symbols display in collapsed rows according to the following specifications: Position: Fixed Symbols may display either above the data or below the data. Columns: dimensions display in column A, symbol names display in column B, and symbol descriptions display in column C. If only symbol names or only symbol descriptions are visible in the report, they appear in column B.

Feature	In the report...	In Microsoft Excel...
Conditional Display	If the Report Publisher has included any highlighting, filters, or symbol suppression, these display in the report when Apply Conditional Display is selected.	If the Report Publisher has included filters or symbol suppression, these are carried through to the exported report when Apply Conditional Display is selected at the time of export. **Note:** Highlighting is not carried through to the exported report.
Number formatting	The Report Publisher may have configured the report to included number formatting.	Number formatting is carried through to the exported report.
Font styles and sizes	The Report Publisher may have configured the report to display various font styles and sizes.	Variations in font styles and sizes do not display in the exported report.
Scaling	Report data may be scaled. The Report Publisher may have configured the report to include a scaling indicator in the report title or it may display either above or below the data.	Scaling is carried through to the data, but the scaling indicator does not display in the exported report. True values for data display in the formula bar.
Row indentation	The Report Publisher may have indented leaf or parent rows in the report.	Indentation is carried through to exported reports.
Comments	If the report contains any comments visible based on the expansion state of symbols, they display in a list in the information pane.	Comments do not display in the exported report.
Attachments	If the report contains any attachments visible based on the expansion state of symbols, they display in a list in the information pane.	Attachments do not display in the exported report.

Working with printing

You can specify the way you want a report to appear on printed pages. While you are specifying print options, at any time you can click Print using system dialog in the settings pane to specify print settings using your operating system's standard print dialog.

You can also navigate through multi-page reports on the print preview page and modify the magnification of the print preview page to see the way the reports will print. Use the following table to review possible view options on the print preview page.

Status bar option	Use to...
Previous page	navigate to the previous page of the report. This option applies only to reports printed on more than one page. Alternatively, you can type a page number to navigate directly to a specific page.
Next page	navigate to the next page of the report. This option applies only to reports printed on more than one page. Alternatively, you can type a page number to navigate directly to a specific page.
Zoom Out	decrease the magnification of the print preview by 1%. Alternatively, you can drag the slider to the desired zoom level.
Zoom In	increase the magnification of the print preview by 1%. alternatively, you can drag the slider to the desired zoom level.
Zoom to Page	reset the magnification of the report to display one full page.

Note: Modifying the magnification of the print preview applies to the current view only and not the way the report is printed.

Understanding printed pages

Reports display with some slight differences between the screen and the printed page. These differences are designed to maximize your experience while viewing reports either on screen or on printed pages. Use the following table to understand the differences in features you may see when comparing a report on screen and a report's printed pages.

Feature	On the screen	On the printed page
Title, Header, and Footer text	Text for titles, headers, and footers wraps on the screen if left, center, or right text overlaps, allowing you to review all the text the Report Publisher has included.	Text for titles, headers, and footers wraps if left, center, or right text overlaps to accommodate the selected paper size.
Fixed Symbols	If the Report Publisher has configured the report to display Fixed Symbols, Fixed Symbols display only on the Fixed Symbols tab in the information pane. If the Report Publisher has configured the report to hide Fixed Symbols, the Fixed Symbols tab does not display in the report.	If the Report Publisher has configured the report to display Fixed Symbols, Fixed Symbols display according to the following specifications: Position: Fixed Symbols may display either above data or below data. Frequency: Fixed Symbols may display on all pages, or on one page only - either the first page if the specified position is above the data or the last page if the specified position is below the data. **Note:** If the Report Publisher has configured the report to hide Fixed Symbols, Fixed Symbols do not appear on printed pages.
Conditional Display	If the Report Publisher has included any highlighting, filters, or symbol suppression, these display on the screen when Apply Conditional Display is selected in the report view.	If the Report Publisher has included any highlighting, filters, or symbol suppression, these carry through to printed pages when Apply Conditional Display is selected in the report view. **Note:** When printing in black and white, highlighting and shading appear similar.
Comments	If the report contains any comments visible based on the expansion state of symbols, they appear in a list in the information pane.	If the report contains any comments visible based on the expansion state of symbols, they print as a list on separate pages at the end of the report.

Feature	On the screen	On the printed page
Attachments	If the report contains any attachments visible based on the expansion state of symbols, they appear in a list in the information pane.	If the report contains any attachments visible based on the expansion state of symbols, they print as a list on separate pages at the end of the report, after the list of comments.

Preparing reports for printing

Before you print a report, it is important to make sure the report displays the way you want it to. You may want to navigate through a hierarchy, change display options for symbol names or descriptions, or modify conditional display options.

To prepare a report for printing:

1. Open the report using the appropriate method. For more information, see Opening reports.
2. Confirm that the report displays the following features the way you want it to for printing:

Feature	To make changes...
Dimension orientation	follow the steps in Modifying symbol selections.
Expansion state of hierarchies	follow the steps in Navigating hierarchies.
Displaying symbol names and/ or descriptions	follow the steps in Displaying symbol names and descriptions.
Conditional displays	follow the steps in Enabling and disabling conditional displays.

Printing reports

Reports print based on the current view, including the way symbols are expanded or collapsed and whether conditional display is applied or not applied.

To print a report:

1. Follow the steps in Preparing reports for printing.
2. Click Print Preview. The print preview page displays.

   Note: At any time, you can review and select print settings using your computer’s print options by clicking Print using system dialog.

3. In the **Copies** field, specify a number between 1 and 32767 for the number of copies to print.

4. Select the appropriate printer from which you want to print the report.

5. Complete the following fields:

Field	Description
Print All Pages	■ Select Print All Pages to print all pages displayed in the report. ■ Select Print Custom Range to specify a range of pages to print.
Pages	If you selected Print Custom Range, specify the page range to print. **Note:** If there are Comments and Attachments in the report, they print on separate Comments and Attachments pages after the report content. If you want to exclude Comments and Attachments from printed pages, specify the last page displaying report content only.
Print One Sided	■ Select Print One Sided to print the report on only one side of paper. ■ Select Print on Both Sides, Flip on Long Edge to print the report on both sides of the paper, flipping the paper on the long edge. ■ Select Print on Both Sides, Flip on Short Edge to print the report on both sides of the paper, flipping the paper on the short edge.
Collated	■ Select Collated to print the report in sequence in its entirety before printing another copy. ■ Select Uncollated to print all copies of the first page of the report before printing all copies of the next page, and so on.
Portrait Orientation	■ Select Portrait Orientation to print the report so that the page is taller than it is wide. ■ Select Landscape Orientation to print the report so that the page is wider than it is tall.
(paper size)	Depending on your printer and location, various page sizes are available. Select the paper type on which you want to print the report.
Across, Then Down	■ Select Across, Then Down to print multiple pages from top to bottom. ■ Select Down, Then Across to print multiple pages from left to right.

Field	Description
(margins)	▪ Select Normal Margins to print the report with the Left and Right margins at 0.7 inches and the Top and Bottom margins at 0.75 inches. ▪ Select Wide Margins to print the report with all four margins at 1 inch. ▪ Select Narrow Margins to print the report with the Left and Right margins at 0.25 inches and the Top and Bottom margins at 0.75 inches. ▪ Select Custom Margins to customize the margin size for the printed report. Specify a number, in inches, for each of the four margins.
No Scaling	▪ Select No Scaling to print the pages at their actual size. Select Fit Report on One Page to shrink the printed report to fit on one piece of paper. ▪ Select Fit All Columns on One Page to shrink the printed report to the width of one piece of paper. ▪ Select Fit All Rows on One Page to shrink the printed report to the height of one piece of paper. ▪ Select Custom Scaling Options to specify the way you want the report scaled. Specify one of the following: ▪ Adjust to - Specify the percentage to which you want the report scaled. ▪ Fit to (pages) - Specify the number of pages wide and tall to print the report.

6. When you are finished making changes, click anywhere in the preview area to see the updated settings. The preview updates to display the specified settings.
7. Review the way the report appears for printing.
8. When you have finished specifying print options, click Print. The report prints with the specified settings.

Frequently Asked Questions

Have questions about the Analysis and Reporting application? You may be able to find the answers here.

FAQs on Getting started

This section contains frequently asked questions on getting started in the application.

Can I sign on to the application through the web?

Yes, if your system is configured to do so. If your system is set up to use the web, you need to know the location of your Longview web pages. Ask your System Administrator for the URL, or for a link to your Longview web site.

My organization uses Windows authentication, and I'm having trouble connecting to the application database. Why?

If your organization uses Windows authentication, and your user ID contains a space somewhere within the middle of the user ID, the application can process your user ID. However, you cannot have one or more spaces at the end of your user ID.

Why can't I connect to the application database?

You may have selected the wrong authentication method.

To correct an authentication problem, make sure you select the correct authentication method (Windows authentication or Longview authentication).

How do I know if I have access rights to a particular component?

In order to use an application component, you need to sign on to your Longview web page, or Longview Component Manager. Look for the icon representing the application component you want to use. If it does not appear, you do not have access rights to it.

If you need access to a component whose icon does not appear on your screen, see your System Administrator.

I want to change my connection settings temporarily, but the Change Settings selection in the Tools menu is dimmed. What should I do?

You are currently connected to the application database. You can change your connection settings only when you are working offline.

How do I update my application files?

If you use the application through the web, you do not need to install any files on your computer.

FAQs on Longview Analysis and Reporting

This section contains frequently asked questions on Longview Analysis and Reporting.

I am the Report Publisher. I want to publish templates to user groups, but I can’t see those groups in the Publish dialog. Why?

As the Report Publisher, you must belong to the user groups to which you want to publish templates. Ask your System Administrator to edit your user ID in Longview Application Administrator, to add those user groups.

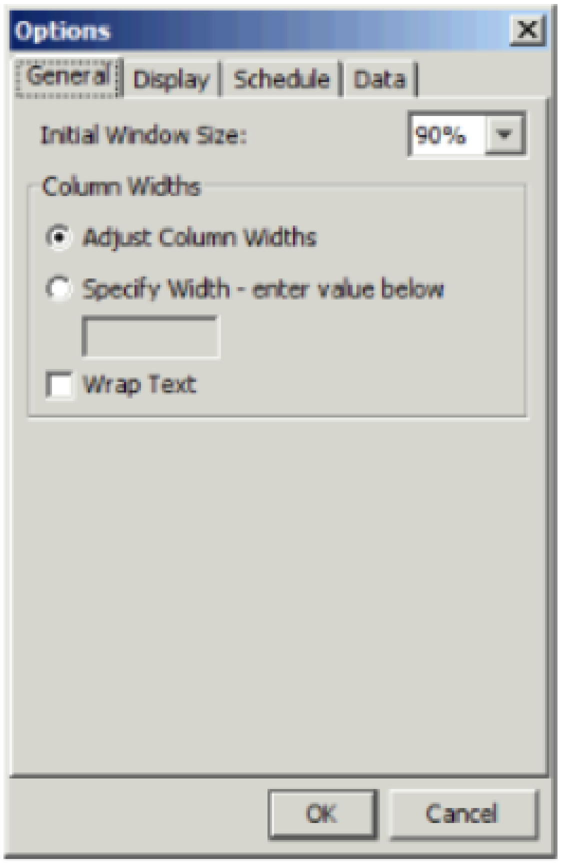
Why does my report view always open the same size, even though I changed its size in the last session?

By default, a report view automatically opens in its last saved setting size, as specified in the Options dialog.

When you manually change the size of an open report view, it reverts back to its last saved setting size when you close and reopen it.

To change the size of a report view, so that it opens the same size every time, follow these steps.

1. In the DataView window, choose Tools > Options. The Options dialog appears, with the **General** tab in view.



2. For **Initial Window Size**, select the size in which you want the DataView to appear when you first open it.
3. Click OK. The DataView appears.
4. Save the DataView.
5. When you reopen the DataView in subsequent sessions, it appears in the size you specified.

Is there a quick way to change the orientation and symbols in a DataView?

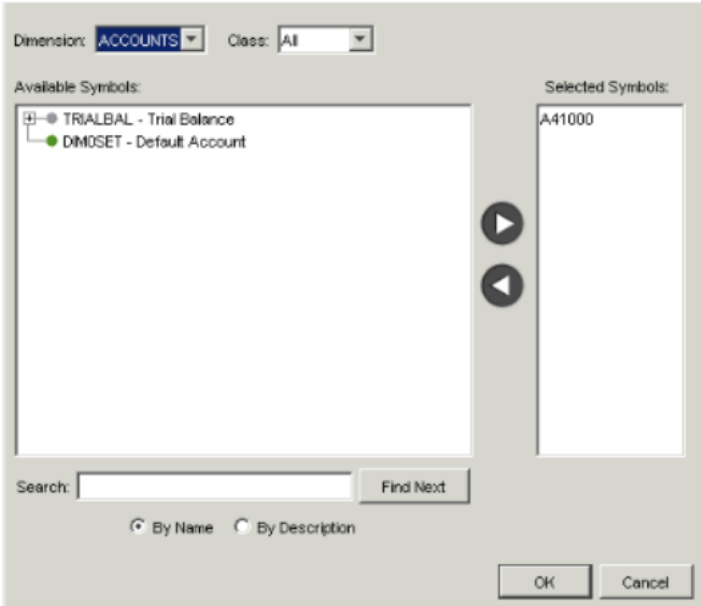
To quickly change the orientation of a DataView, click and drag the dimension buttons in the DataView to the desired orientation.

Why can't I see certain symbols in a DataView?

There are two possible reasons for this. Certain symbols in the ***DataView*** may be hidden.

To find out which symbols are hidden, follow these steps.

1. In the DataView window, choose Edit > Hidden Symbols. The Hidden ***Symbol Selection*** dialog appears, showing all hidden symbols in the Selected Symbols list.



2. To make a hidden symbol visible again, select it in the Selected Symbols list, and click Remove.
3. Click OK. The DataView appears, showing the previously hidden symbol.

Or, you could have an active condition in the DataView that suppresses certain data. To see whether this is the case, do one of the following:

1. Deactivate the conditions in the DataView.
2. Check the Conditional Display dialog to see whether there are any conditions in the DataView that suppress certain data.

Why can't I change the data in a DataView?

Longview Analysis and Reporting is a data analysis tool, and as such, you can only view data in a ***DataView***. You cannot change and submit new data.

Why don't my DataView conditions show?

You may have deactivated the conditions for the ***DataView*** at some point. You must reactivate them.

Why can't I see floating time period symbols in a DataView?

You can see floating time period symbols only if your System Administrator has prepared them in Longview Application Administrator, using the attribute SGPFloatingTimePeriods.

For more information, see your System Administrator.

I have converted my DataView to an Excel spreadsheet. Some of the symbols seem to be missing. Why?

Hidden symbols, suppressed symbols, and the child symbols of collapsed report view symbols, do not appear in an Excel worksheet. You must make these symbols visible before conversion.

I have converted my DataView to an Excel spreadsheet, but I can't change its orientation in Excel. Why not?

When you converted your ***DataView***, you probably selected the **As Displayed** option. To be able to manipulate the data in Excel, you need to select the **In PivotTable format** option.