

## Business Intelligence Script

Clip Link: [http://www.eshbel.com/Movie\\_Search/BI\\_clip.htm](http://www.eshbel.com/Movie_Search/BI_clip.htm)

Note: Yellow highlights indicate action instructions.

### Working in Dashboards (00:00-05:08)

In this video we will demonstrate how to work with **Priority's** built-in advanced analytical and business intelligence tools.

While each of these tools can also be accessed from the Main Menu in **Priority**, we're going to demonstrate a few additional methods of launching each type of tool.

Let's begin with a look at **Priority's** dashboards. **Click on the gauge icon in the lower left-hand corner** to access your personal dashboard. Dashboards give you a look at condensed information from within the software in real time so that you can view live data on Sales Opportunities, Orders, Budgets and more.

Each area displayed is called a web part.

**Click on the pencil icon** to display the selection of web parts, where you can hide, select and arrange web parts as needed.

You can also choose to include specific websites as part of your dashboard, provided these sites have been properly defined in **Priority**.

When you are done making your selections, **click GO** to refresh the dashboard display and view the web parts you have selected.

Each web part is comprised of options specific to the related data. The options in the **Sales Orders web part** are different than the ones in **the Purchase Orders part**, which are in turn different than what is displayed in the **Budgets web part**.

View the data as a **chart, graph, pie or report**. The graphic tools in **Priority** allow you to alter the display of any of these visual representations by **clicking on the graph icon** in the selected web part. You can also **click the calendar icon** to determine the date range for which reports are run.

**Right click the pie** for additional options, such as printing directly from the dashboard, **rotation, slicing movement, or the ability to drill down to the details in a particular slice of the pie**. **Click on the magnifying glass icon** to maximize the web part. Drill down to cross sections from any of the display modes, as we are doing with the pie section. With **Priority's** business tools, you can intuitively **drill down** and drill across your data.

Let's **return to the dashboard**.

Additionally, **Priority's** dashboards offer dials representing key performance indicators, or KPIs, of select matrices of your data. Set the KPIs in the **Definition of Gauge Scales** form located in **the Executive Reports, Executive Report Maintenance menu** item. Here is where you define the percentage parameters for each gauge, reflected not only on the KPI dials, but as indicators in BI reports as well.

You can launch the Dashboards from **Priority**, or set them up to launch directly from within Outlook. **Go to the Mail option on the upper tool bar and select Priority on Outlook**. **Priority** comes equipped with a number of role-based, pre-defined dashboards and BI reports for key users such as the CFO, sales manager and more that can be added to the Outlook Dashboard. **Choose from the available dashboards**.

Then, **from within Outlook**, simply **click on the shortcut arrow in the bottom left hand corner** of your Outlook menu options and **select the dashboard** or BI report to be displayed. View your data from within Outlook, and **drill down directly into the documents in Priority** when further investigation is required.

### BI Reports (05:09-06:50)

BI reports are another tool available for analyzing key business data in **Priority**. In BI reports, you determine the exact cross-section of data to be displayed by drilling down within categories and accessing only the specific data that you want to see. For example, you can see sales data for a

particular sales rep, cross-referenced by the type of sale and broken down by the exact part that was sold. Once you have achieved the desired display of data, you can export the report to Word, Excel or Outlook, or save it as an HTML page.

BI reports are accessible both from within the **Priority** menu and from the dashboard, as we've already seen. You can also activate certain BI reports from any form column with a green  icon next to its title. When run in this fashion, the report focuses on the particular value that appeared in the form column when you activated the report. If you want to return to the entire population, **click the Return to Start icon at the top of the report.**

Once you have run one of the BI reports, a number of options are available to help you fine tune and view the data you need in the format of your choice. You can find detailed explanations of all the available options in the Executive Reports wizard.

### Defining Periods for BI Reports (06:51-09:16)

For instance, you can specify the particular period and company for which to display data. You can specify an absolute period, such as the first quarter of 2011, or indicate the range of dates when the period begins and ends. You can then **choose from a list of relative Start and End Dates** or **open a pop-up calendar** from which to choose the exact Start or End Date.

You can also select a **Level of Detail** for the report. For example, you can run the report for a whole year displaying data for each quarter. If you are working in a multi-company environment, you can also **select the company for which to display data.**

You may want to compare data from more than one company or period. To do so, simply move to another line and indicate the second **Company** and **Period.**

Whatever values are currently chosen become the default the next time the report is run. You can also save these definitions for reuse by **clicking on one of the numbered buttons in the Save Template section.** Any time you run this report again, you can simply select the desired template to retrieve your saved definitions.

The report opens with a default set of data. **Click the (Define Display Data) icon** to add or remove specific report columns and KPIs, using the available checkboxes. KPIs are indicated in the report by colored control lamps and reflect the values defined previously.

Next we'll **click the define format icon** and select the appropriate display options for sums and percentages. Let's round all sums to the nearest whole number and, instead of the sums themselves, let's view just the difference between sums from each of the different periods we are comparing.

This input screen also allows you to choose the Dimensions format, which affects how data will be displayed once you begin drilling down. Let's look at the **Multi-dimensional format** first.

### Drilling Down Within BI Reports (09:17-12:31)

The Multi-dimensional format allows you to drill down and view different cross-sections of the data in a single screen, organized within a hierarchical tree. Click the leftmost value in the row to see the numerous slicing and dicing options available. Select a sub-category in the pop-up menu. The corresponding node in the tree is expanded accordingly, and can later be collapsed if desired. Your selection at each level is saved as the default cross-section at that level of the report. Thereafter, you can simply **click the arrow** next to any node at that level to display the default cross-section defined at the next lower level. Note that the **total for each node** appears above its **component items**, and the total for the entire population is visible at all times at the top of the page.

Once you have achieved the desired display of data, you can use the available icons to export the report to **Word, Excel or Outlook.**

**Clicking on a linked value** in the data opens a detailed report of any components that make up that amount or sum. You can then access the **Priority** form where specific data originated by clicking on linked values in this report.

This display format allows you to view values for the entire population as well as zoom in on specific cross-sections without losing global context.

In contrast, the **One-dimensional format** displays each level of data by itself. That is, once you select a dimension by which to slice the data in a given screen, the selected cross-section is displayed

alone. **Click any hyperlinked value in the leftmost column** to continue drilling down within the data until you reach the cross-section that you want. The input screen also contains filtering and totaling options that allow you to sum up, view or eliminate all data that match a designated pattern. **Click any column title** to sort the report by the values in that column. You can also **click on any of the available graph icons** to see a visual graphic representation of the data in a particular section. In order to view data for the previous level, you need to return to the previous screen. As in the Multi-dimensional format, you can **click on the hyper-linked values** to view additional data and use the available icons to export the report to **Word, Excel or Outlook**.

### **Data Cubes (12:32-12:58)**

Data cubes are one of the more advanced features of **Priority's** BI functionality. For any block of information you can access via BI reports, you can generate a data cube using SQL Analysis Services and then save the cube in a format that can be opened in Excel for further analysis. This concludes our tour of **Priority's** Business Intelligence features.