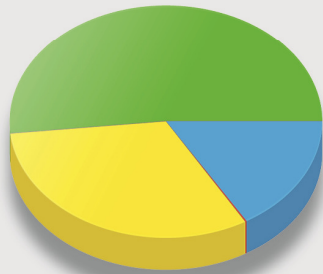
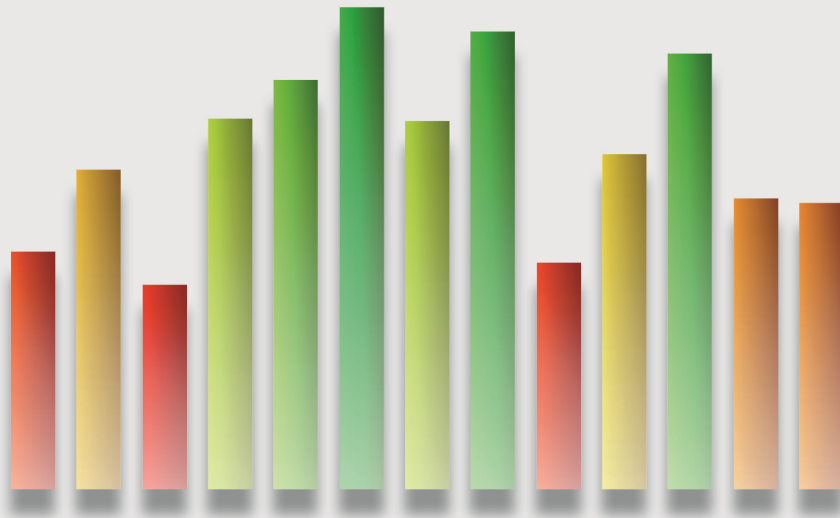


TARGIT Appetizer

TARGIT BI Suite 2K11 SR3



TARGIT Appetizer

TARGIT Appetizer 2K11 SR3 build 5279

Document version 10 - US

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Introduction

The purpose of this *TARGIT Appetizer* manual that you are currently reading is to give you a quick introduction into the wonders of the *TARGIT Business Intelligence Suite*.

TARGIT Business Intelligence Suite is a fully fledged Business Intelligence application that will enable you to analyze your own data in a quick and user friendly manner.

Business Intelligence is about retrieving, reporting and reacting upon crucial data. In other words, making sound decisions as quickly and effectively as possible.

Analyzing is about looking at interesting numbers, *measures*, from different angles, via *dimensions*.

The next chapters will introduce you to the basics of working with and creating analyses in the TARGIT BI Client.

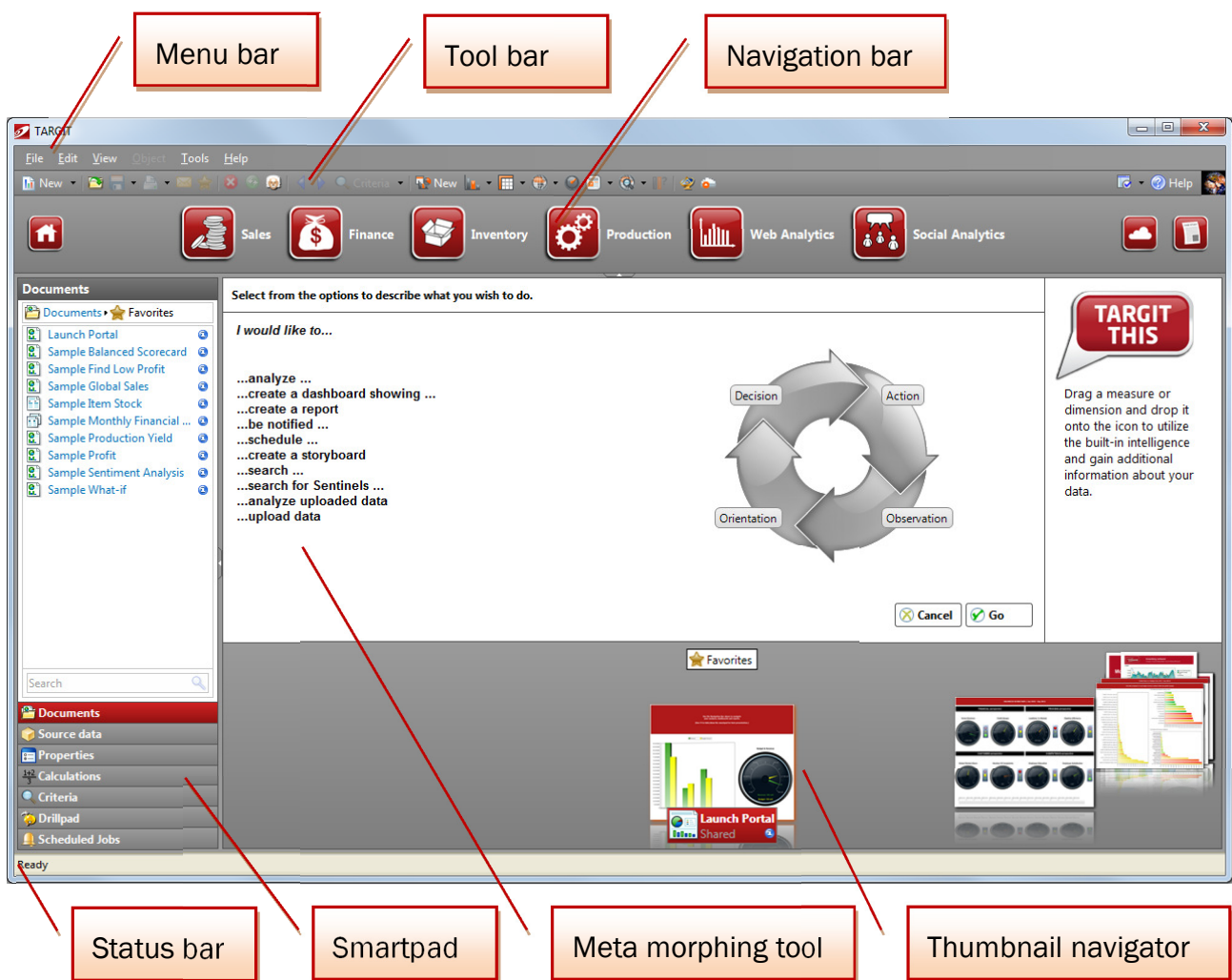
Appetizer #1: Basic Analyzing Techniques

This lesson will serve as a short introduction to the client of the TARGET Business Intelligence Suite. The various elements of the end-user interface will be demonstrated, as well as the basic analyzing techniques involved in working with an existing analysis.

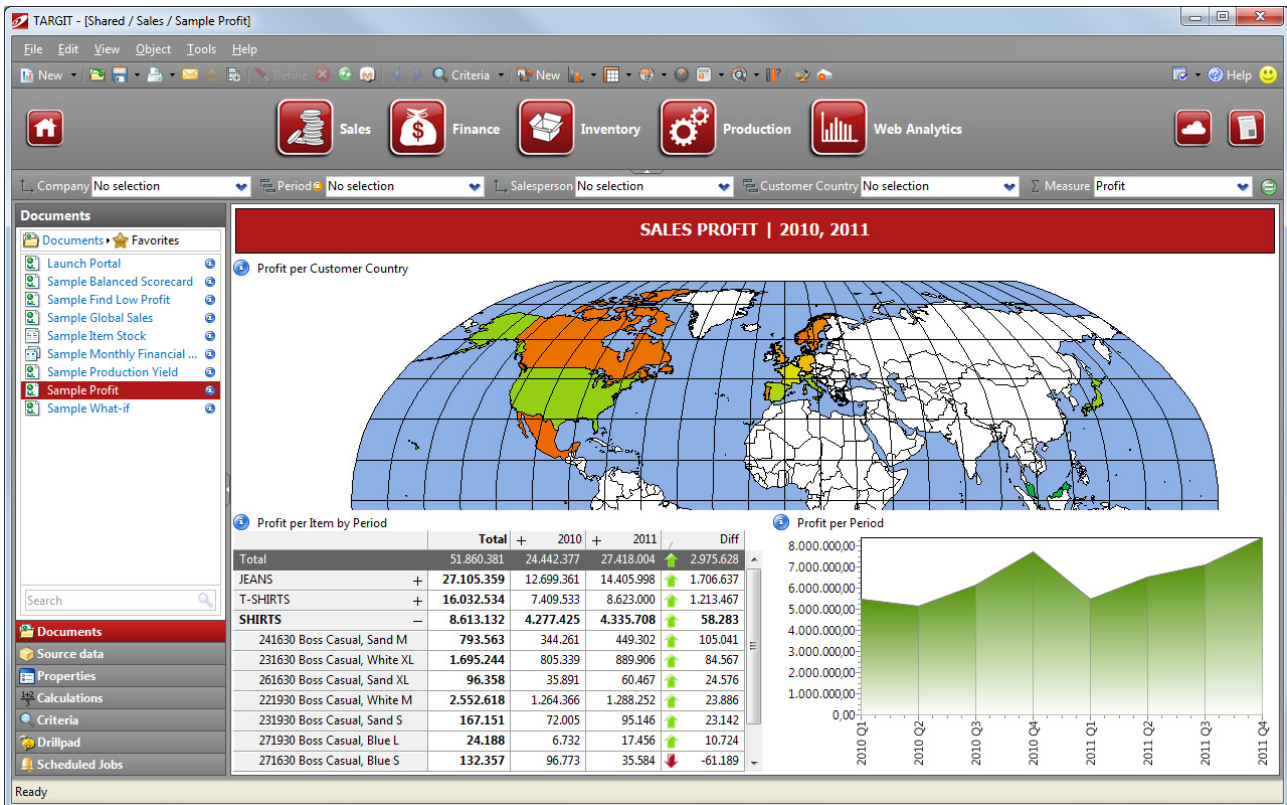
After the lesson all users, also those without any prior knowledge about the product, will be able to utilize the most basic functionality in the TARGET client.

The End User Interface

The main components of the End User Interface, when opening the TARGET Windows client for the first time, are:



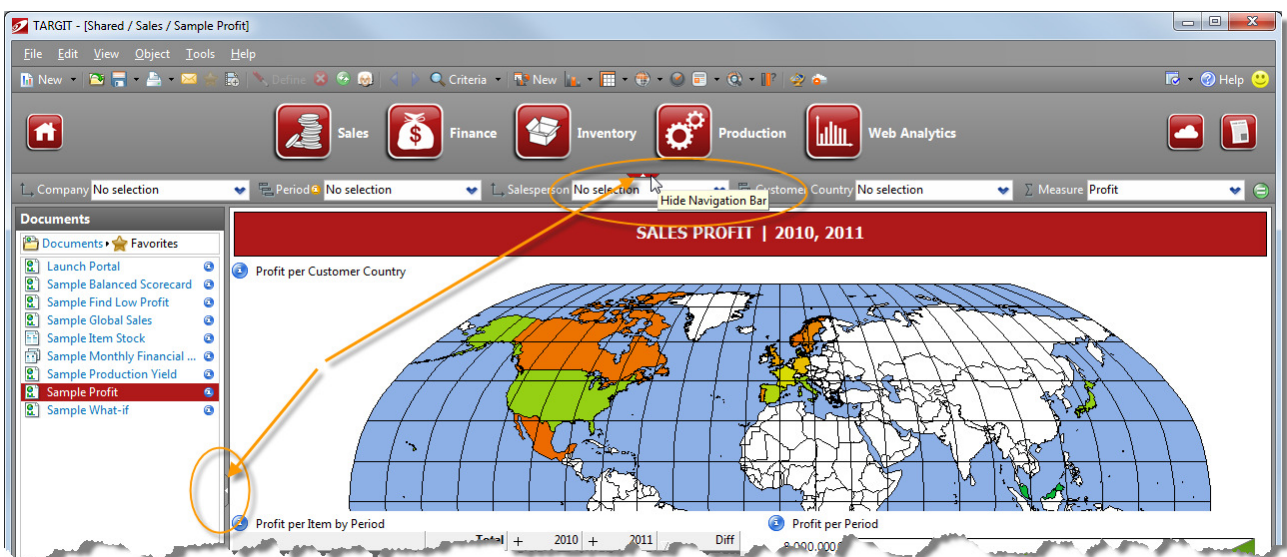
And when a sample analysis has been opened from the Documents / Favorites folder:



As seen above, the Sample Profit analysis has been opened and this analysis has been created from three data objects: A map, an area chart and a cross tab.

The Criteria bar above the analysis may hold a number of dimensions and serves as a quick way for the end user to select criteria to filter the data in the current analysis.

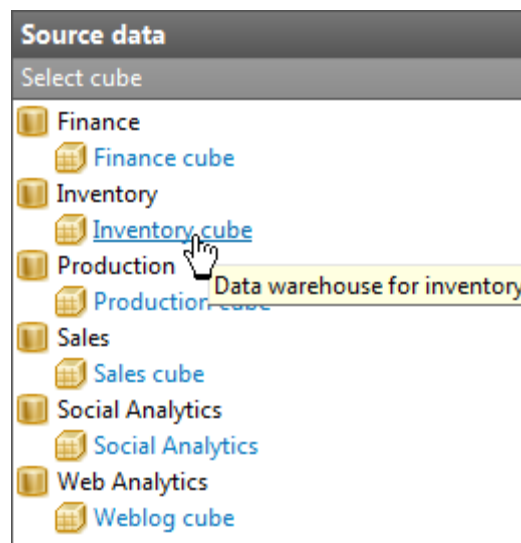
Sometimes, when working with an analysis, you may want to free up some extra space by hiding the Navigation Bar and/or the Smartpad. You do this simply by clicking the small handles at the borders of these two panels.



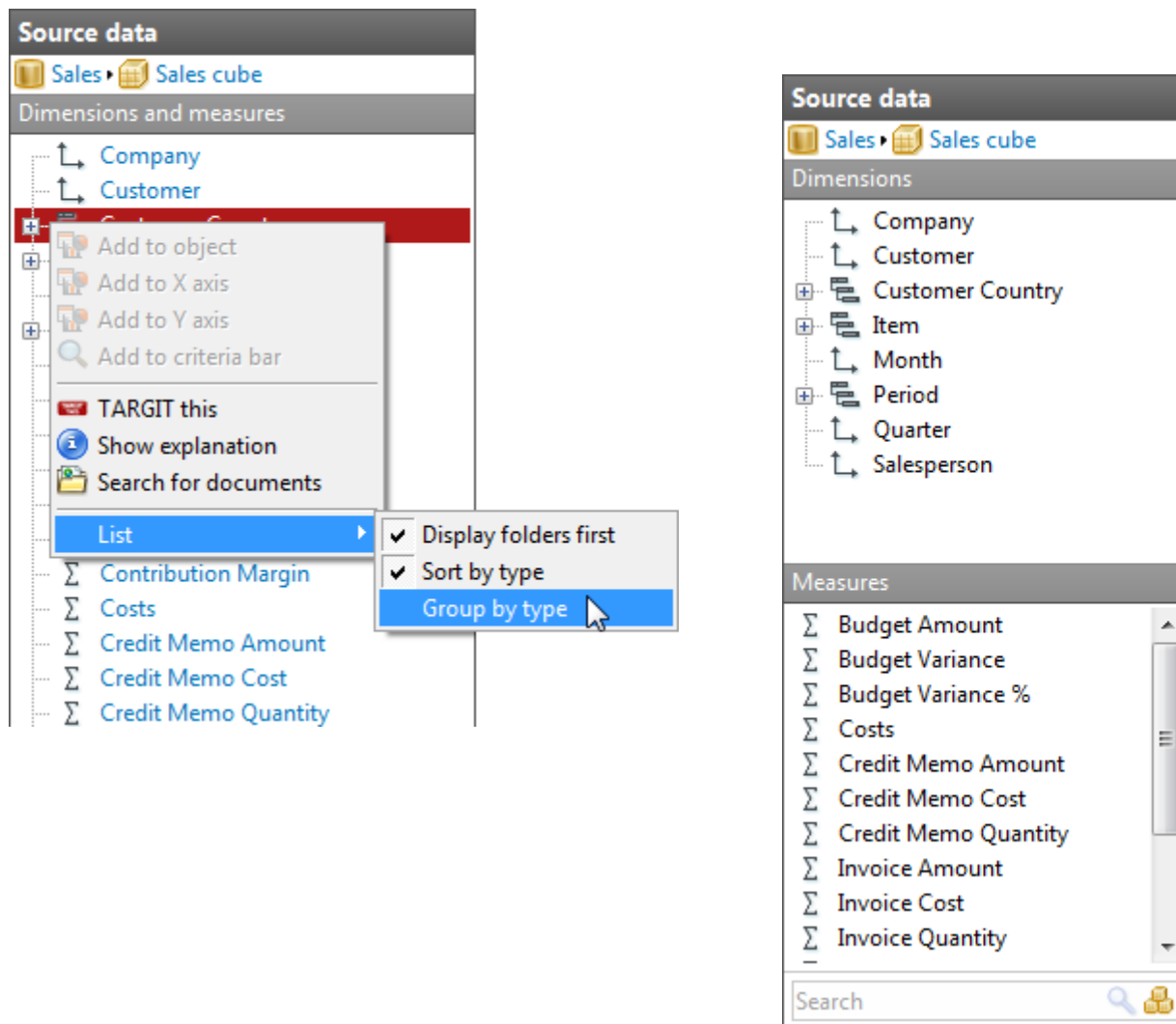
The Source data

From the *Source data* Smartpad we may notice the *measures* (interesting numbers) and the *dimensions* (for categorizing and filtering the measures).

These data may further be split into logical groupings of data, which is expressed as different *Cubes*, also in the Source data Smartpad.



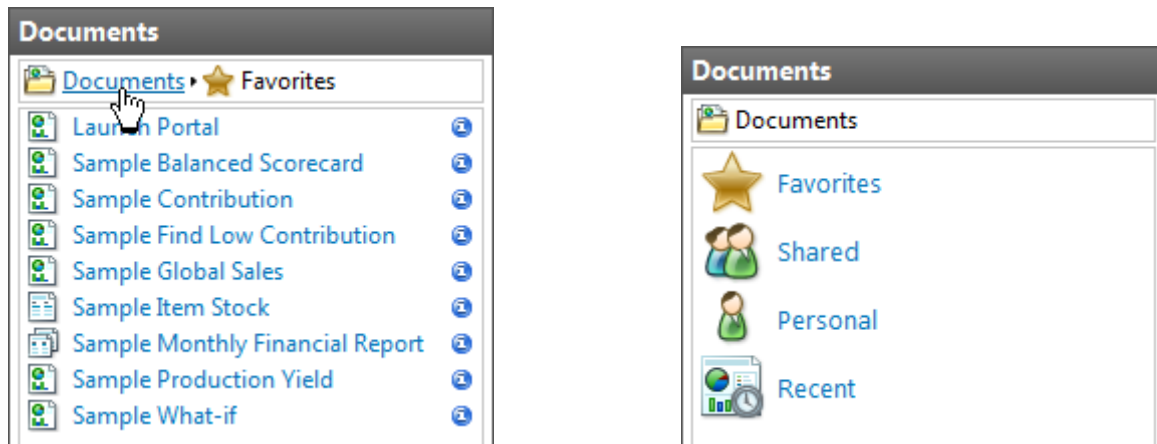
Right-click in the Source data Smartpad and use *Group by type* to split the view into separate Dimensions and Measures lists.



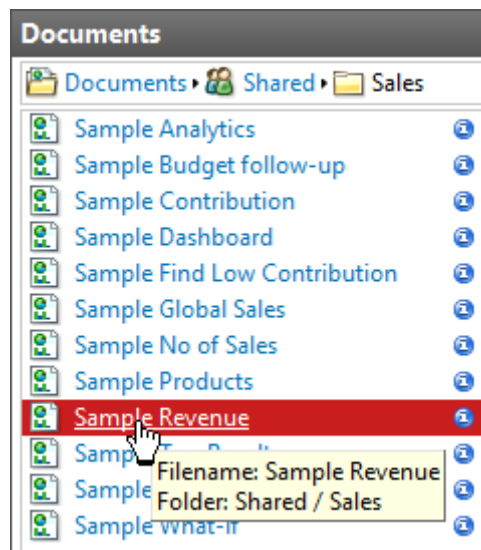
Opening an existing analysis

Your demo installation of the TARGIT BI Suite comes with a number of demo documents, analyses and reports, right out of the box.

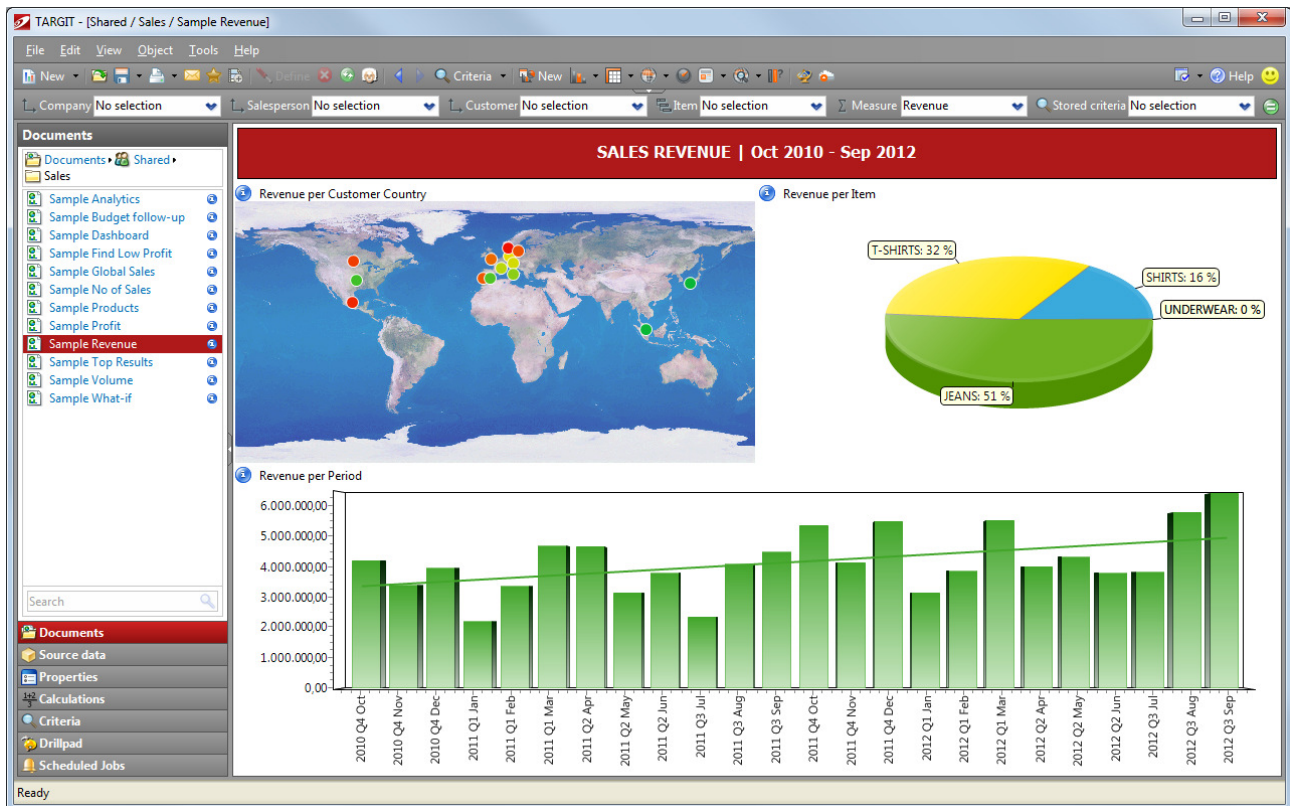
To navigate the documents, use the navigation path on top of the *Documents* Smartpad.



Open the **Sample Revenue** analysis from the Shared / Sales folder.



The Sample Revenue analysis is an example that illustrates a revenue analysis for a clothing company, selling various types of clothes all over the World.



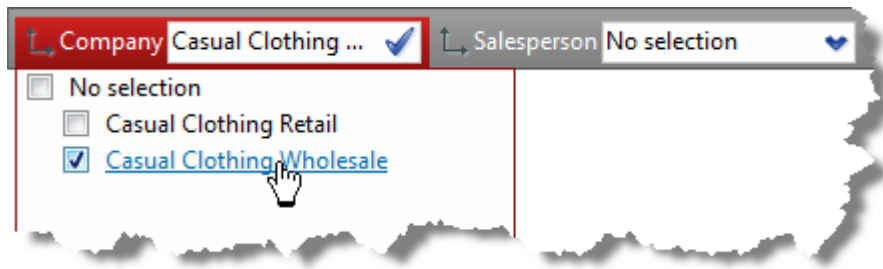
The analysis has been built from three *objects*: A *Map* (revenue per country), a *Pie chart* (revenue per item) and a *Bar chart* (revenue per period).

Global criteria

Notice that a new element appeared near the top of the End-user interface: The *Criteria bar*. When this analysis was designed and saved, somebody decided to add one or more of the dimensions to the criteria bar.



In this way, these dimensions have become very handy for selecting Global criteria for this analysis. A Global criterion is a criterion that filters *all* the data for *all* objects in the analysis.



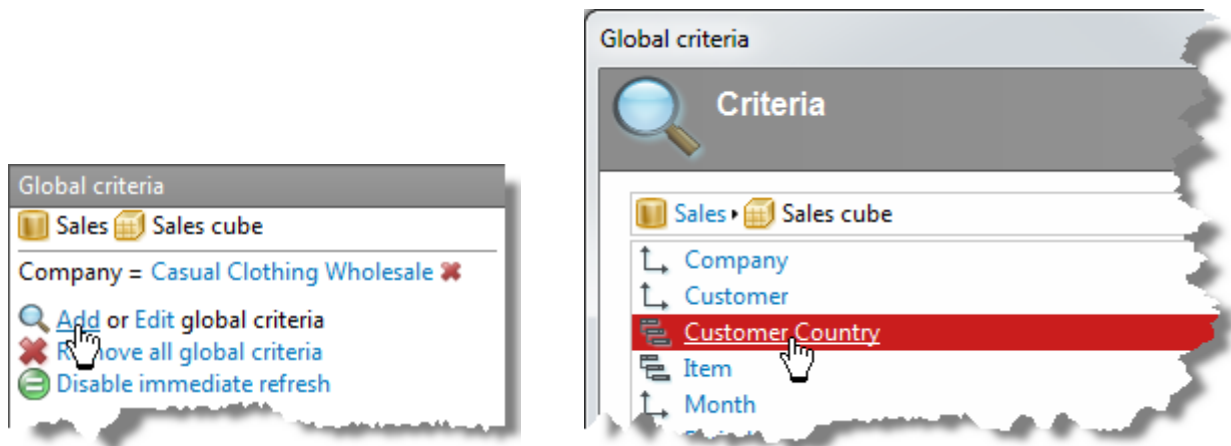
From the *Criteria Smartpad* you may remove existing criteria or add new criteria.

At first, we would like to remove the initial, dynamic *Period* criterion that has been set up to display the last 24 months of data.

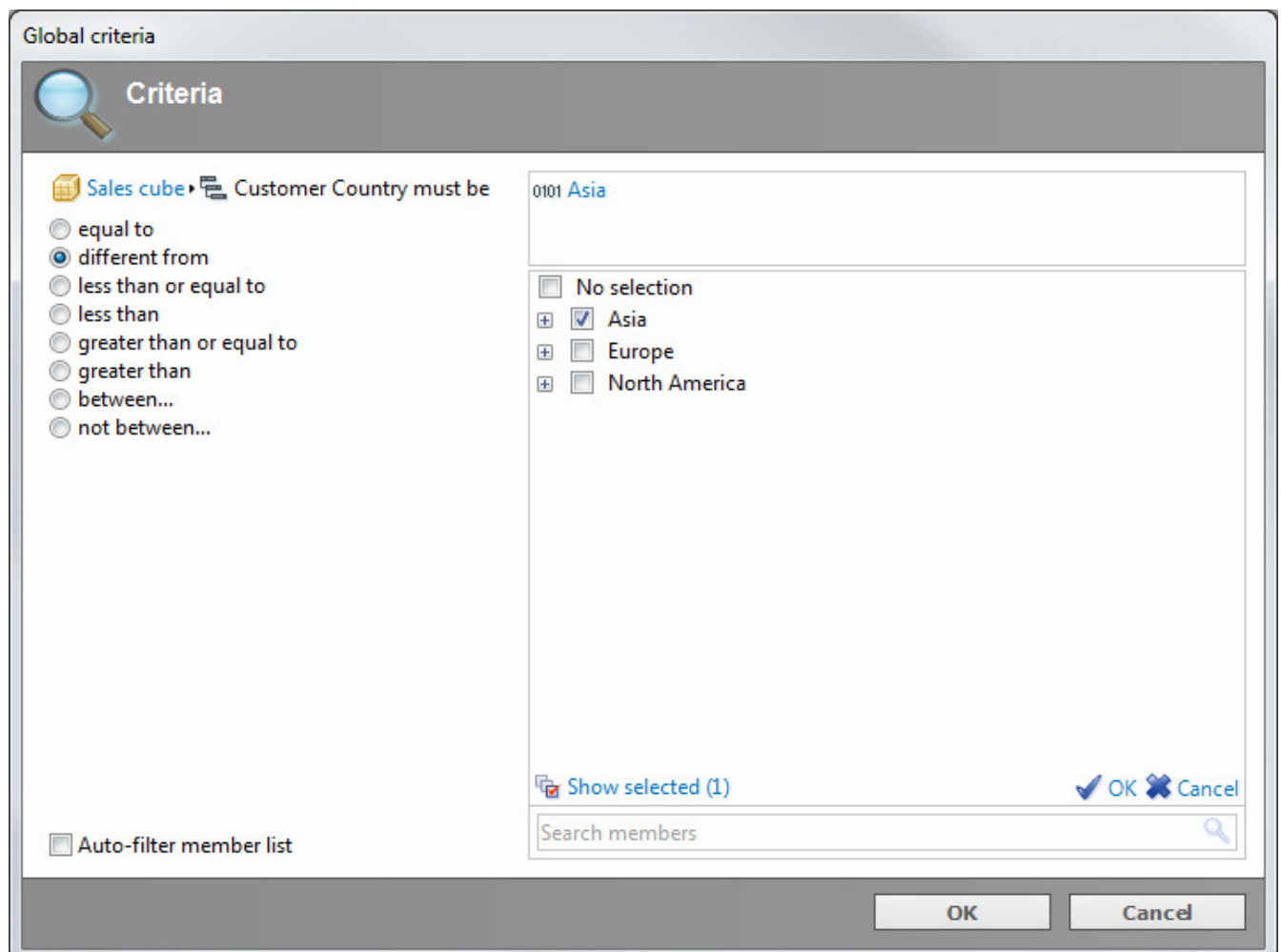


Once it has been removed, we would like to see data for all countries *except* Asian countries.

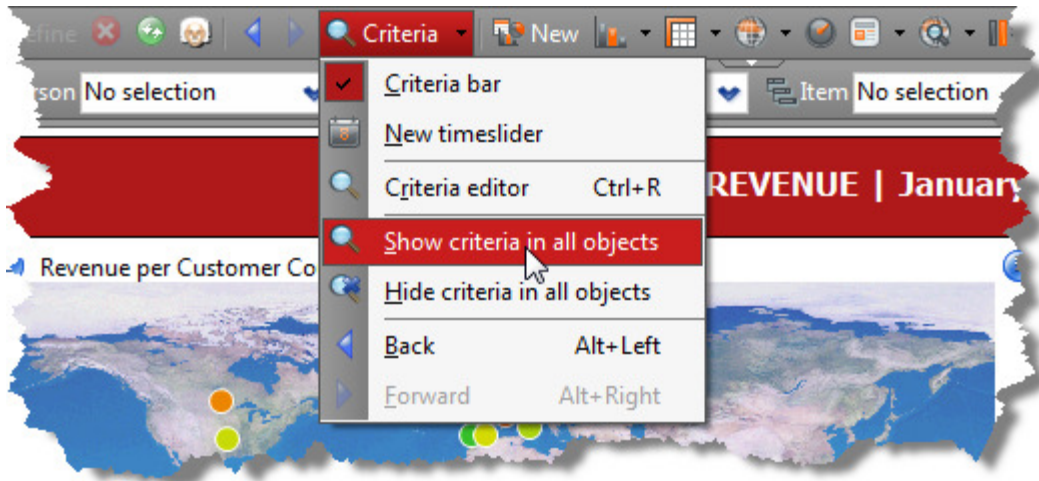
Click the *Add global criteria* to open the *Global criteria* dialogue box.



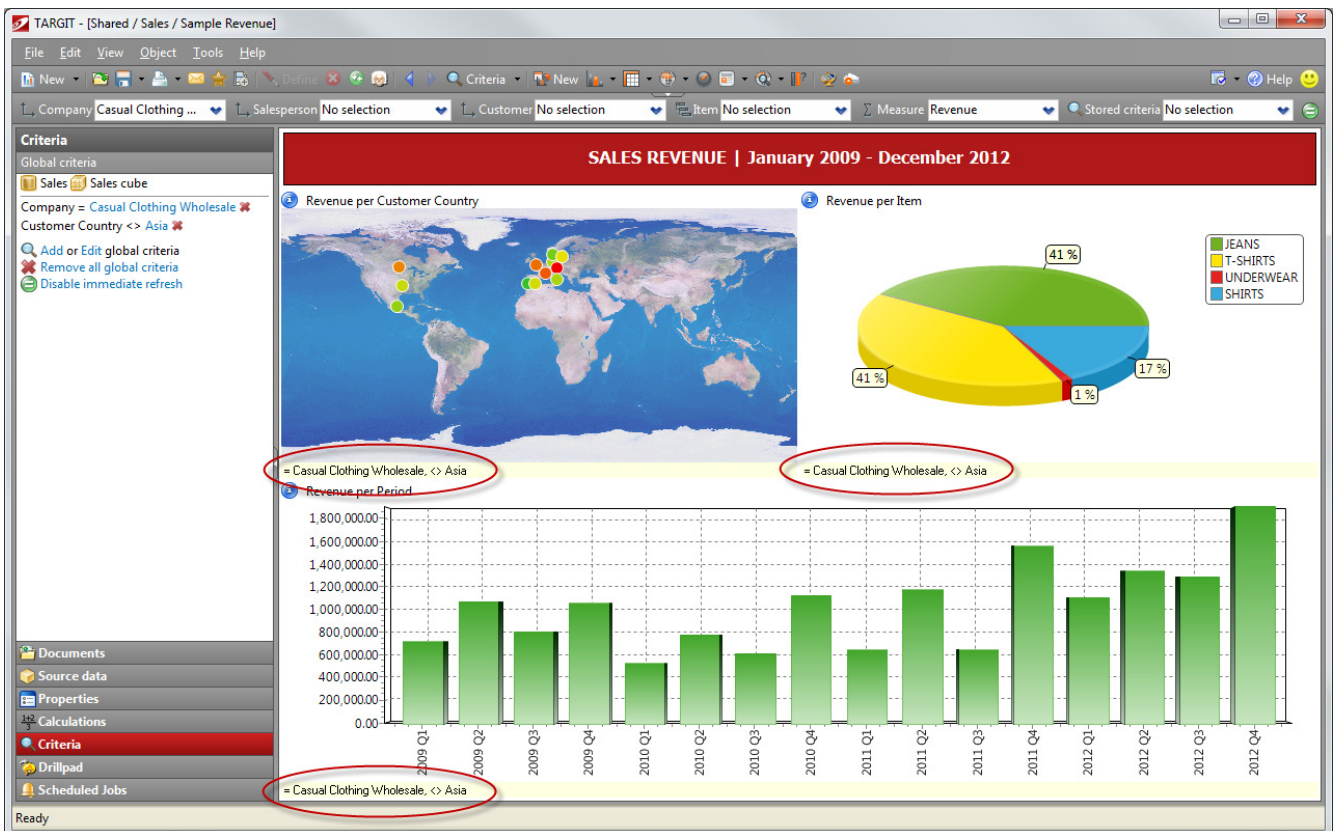
Select the *Different from* operator on the left hand side of the dialogue box and *Asia* on the right hand side. Close the dialogue box by clicking *OK*.



To improve the overview by which criteria our data is currently filtered, you may choose the *Show criteria in all objects* option from the *Criteria* button drop down list in the Tool bar.

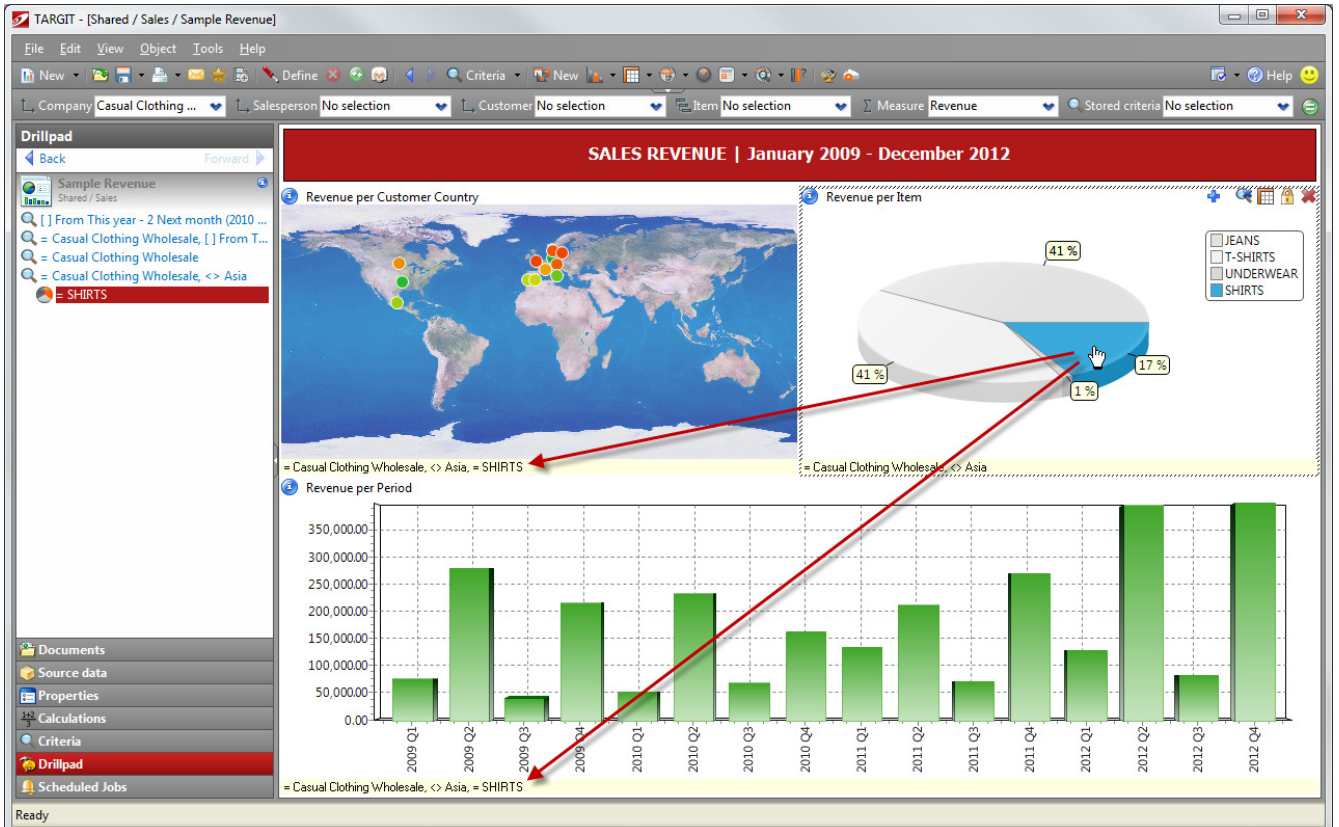


This will display a short criteria notification at the bottom of each object.

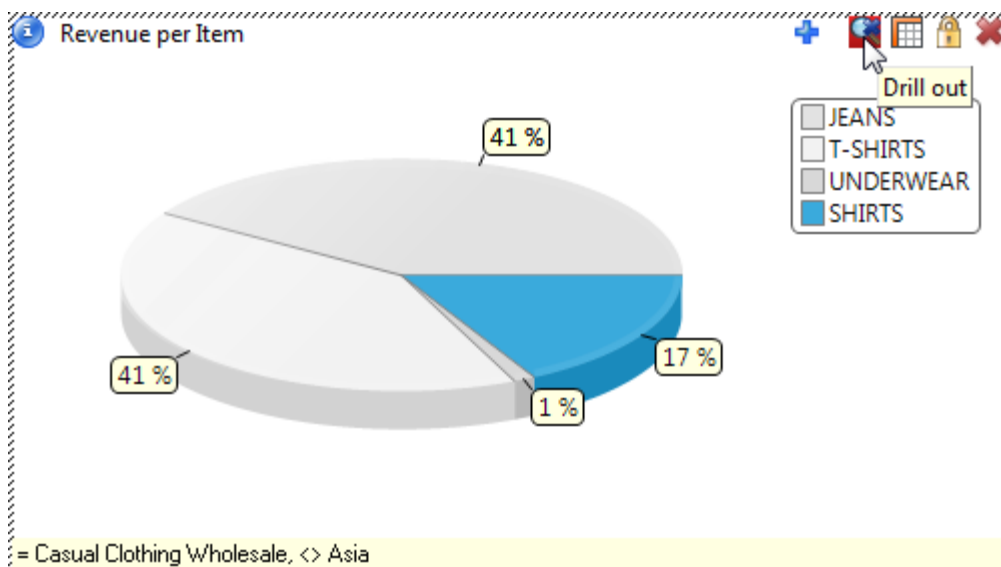


Working with Drill Down Criteria

Finally, you may work with *Drill Down* criteria. Drill Down criteria are applied by clicking a dimension value in one object, the *Drill Down object*, to apply this dimension value as a criterion to the other objects, the *Focus objects*.



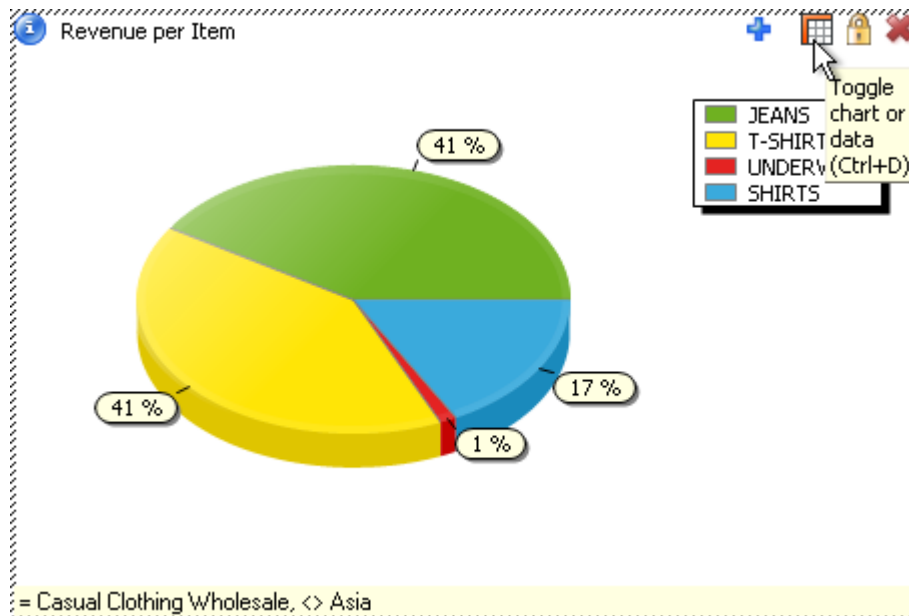
A Drill Down criterion may be cancelled by clicking the *Drill out* icon – or simply by clicking somewhere in the empty space outside an object..



Toggling between chart and data

The Graphical presentation of data is often a good choice when a quick overview is required. But it is also possible to toggle between the graphical presentation and the underlying data.

Use the “Toggle chart and data” option to display graphical data in a cross table presentation...



...and to toggle back to the graphical presentation.

Revenue per Item

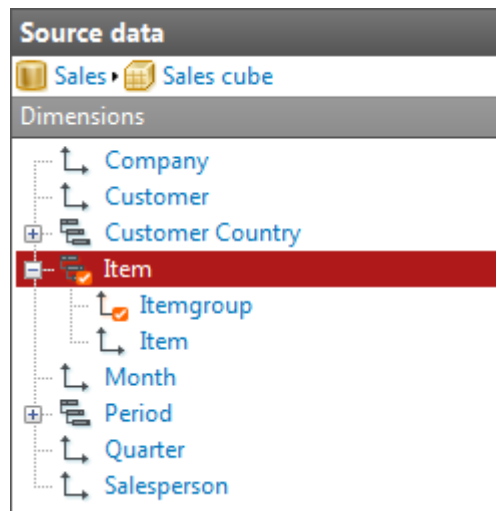
Itemgroup	Revenue
Total	16,321,590.59
JEANS +	6,691,929.03
T-SHIRTS +	6,629,042.38
UNDERWEAR +	203,096.20
SHIRTS +	2,797,522.98

= Casual Clothing Wholesale, <> Asia

Hierarchical dimensions

If we look at the cross table presentation of the Pie Chart we notice the plus signs for each of the Item Groups. This is an indication that the Item dimension is in fact a *hierarchical* dimension.

We may also see it from the Source Data Smartpad where the Item dimension, when expanded, reveals that it is designed from two levels: An *Itemgroup* level and an *Item* level.



In the cross table we may expand and collapse individual Item Groups, or we may expand and collapse all members at the same time. To do this, use the Expand/Collapse buttons in the upper right corner of the object.

Revenue per Item		
Itemgroup		Revenue
Total		16,321,590.59
JEANS	+	6,691,929.03
T-SHIRTS	+	6,629,042.38
UNDERWEAR	+	203,096.20
SHIRTS	+	2,797,522.98

= Casual Clothing Wholesale, <> Asia

The crosstab object with a fully expanded Item hierarchy may now look like this:

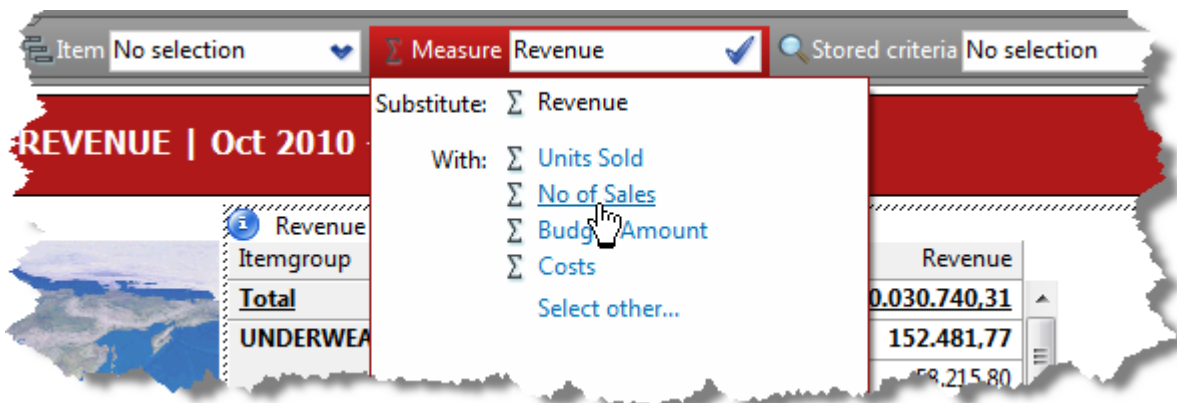
Itemgroup	Item	Revenue
Total		16,321,590.59
JEANS	Total	6,691,929.03
	221560 Marlboro Classic, Sand	1,788,718.68
	221630 Lewis 502, White	1,676,803.20
	221780 Marlboro Classic, Brown	1,130,521.02
	321630 Levis 501, White	1,247,225.54
	321780 Levis 501, Blue	740,963.79
	331780 Levis 501, Black	107,696.80
T-SHIRTS	Total	6,629,042.38
	22109C Levis, Black L	32,601.00
	22111C Levis, Black XL	7,692.00
	22118C Armani, White S	201,925.60
	22118E Marlboro, White L	796,421.04
	221185 Armani, White L	6,972.00

= Casual Clothing Wholesale, <> Asia

Changing measure with the Measure selector

Even though the Sample Revenue analysis initially has been designed to focus on the Revenue measure, it is easy, with a single click, to change the focus to one of the other measures from your source data.

This is done with the *Measure selector* from the Criteria bar.



This is the conclusion of the first Appetizer of this guide. By now, you should have learned some of the basics with regard to analysing data in an existing analysis.

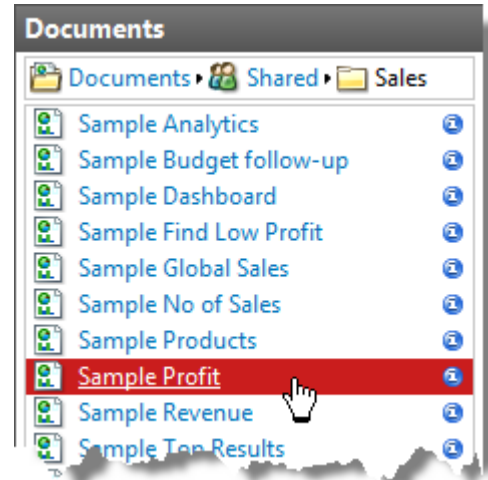
Try out the Exercises to get further accustomed with these techniques.

Exercises:

1)

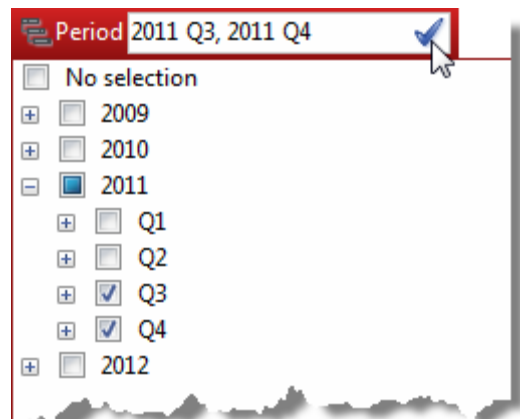
You are the Sales Manager for sales of T-Shirts in **Canada**, and now you want to see how your area of responsibility performed in **2011 Q3 and Q4** with regard to **Sales Profit**.

From the Sales folder, open the *Sample Profit* analysis.

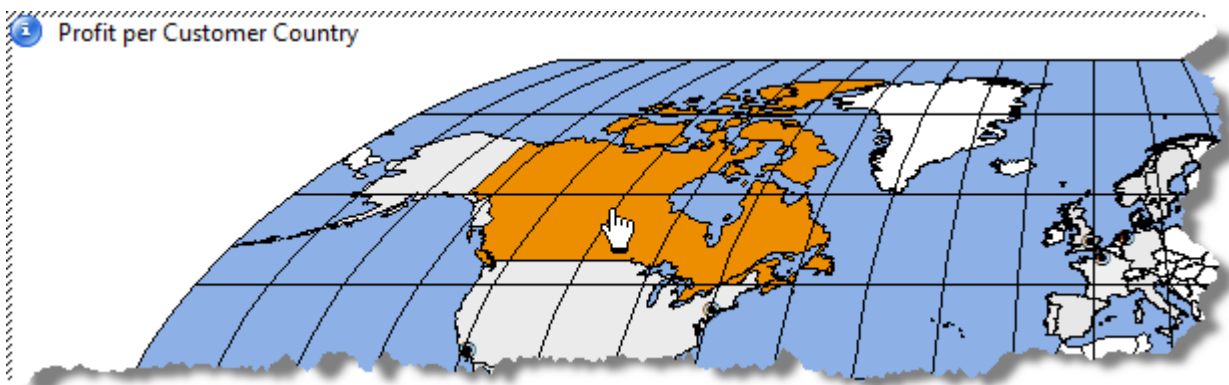


From the Criteria Smartpad, remove any initial Global criteria.

Apply a global criterion, **Period = 2011 Q3 and Q4**.



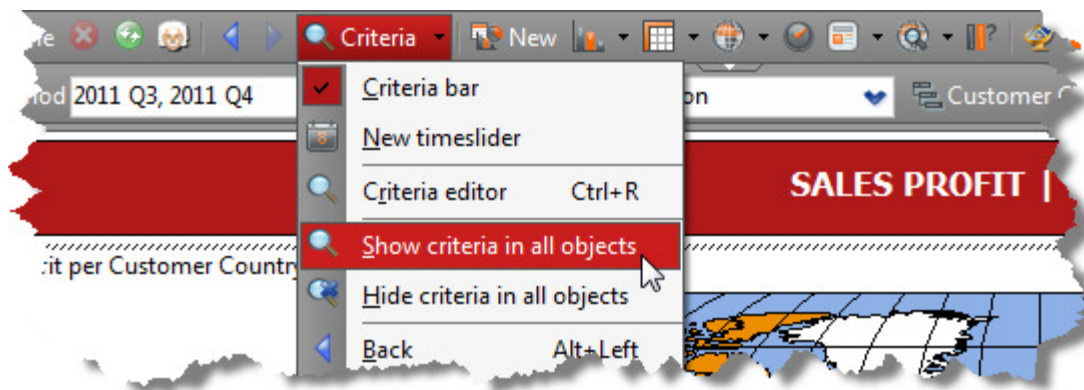
Click **Canada** in the map to apply a Drill Down criterion. The other objects will now display data for Canada only.



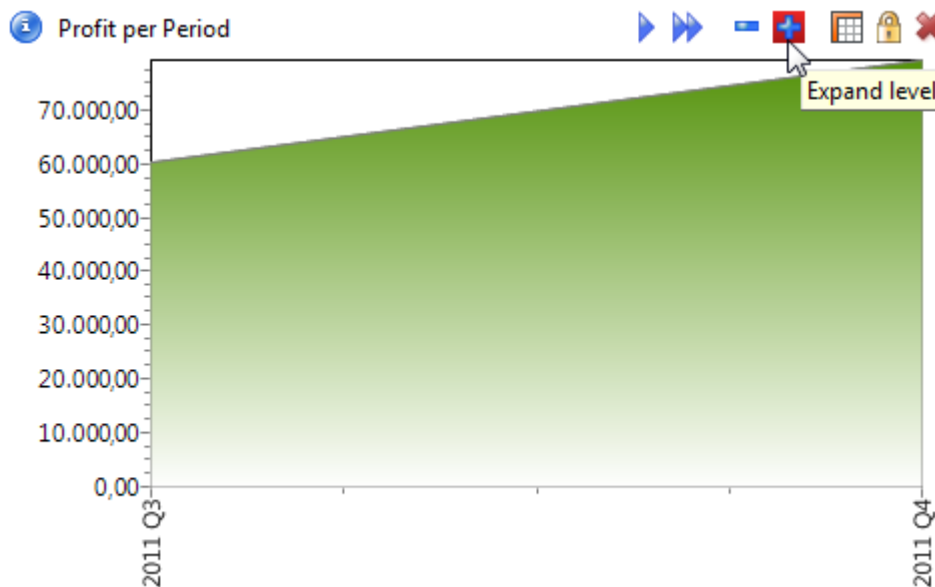
Click **T-SHIRTS** in the cross tab to apply this dimension value as a further Drill down criterion.

Profit per Item by Period		Total	2011		Diff	
			Total	+ Q3	+ Q4	
Total		481.093	481.093	301.755	179.338	↓ -122.417
T-SHIRTS	+	139.562	139.562	60.378	79.184	↑ 18.806
SHIRTS	-	130.998	130.998	87.379	43.619	↓ -43.760
231930 Boss Casual, Sand S		<u>19.029</u>	<u>19.029</u>		19.029	↑ 19.029
241630 Boss Casual, Sand M		<u>808</u>	<u>808</u>	808		↓ -808
231630 Boss Casual, White XL		<u>6.400</u>	<u>6.400</u>	5.761	639	↓ -5.122
221930 Boss Casual, White M		<u>29.703</u>	<u>29.703</u>	17.626	12.077	↓ -5.549
271930 Boss Casual, Blue L		<u>17.456</u>	<u>17.456</u>	17.456		↓ -17.456
321560 Boss Casual, Blue XL		<u>57.601</u>	<u>57.601</u>	45.727	11.874	↓ -33.854
JEANS	+	<u>210.533</u>	<u>210.533</u>	153.998	56.535	↓ -97.463

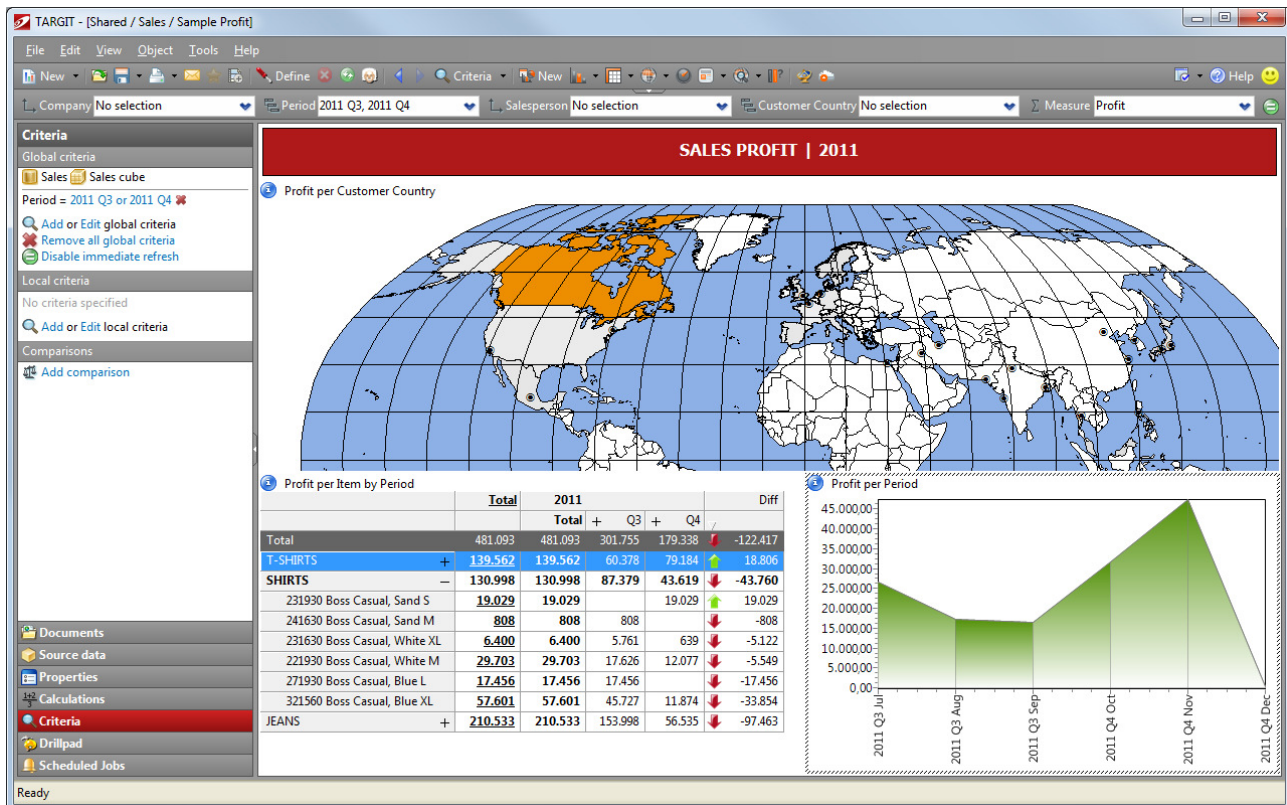
The Area chart will now display data for T-Shirts in Canada in 2010 Q3 and Q4. To verify this, enable the *Show criteria in all objects* option from the tool bar.



To see the monthly distribution of profit in the area chart, you must click the *Expand level* button to move from the quarter level of the Period hierarchy to the month level.



At this point your analysis might look something like this:



Try out some of the other basic analyzing techniques, like:

- Toggling the area chart from graphical display to cross tab display.
- Removing Drill Down criteria.
- Adding further criteria from the criteria bar.
- Adding further criteria from the criteria Smartpad.
- Changing the initial Profit measure to another measure, using the Measure selector from the criteria bar. (Best to remove any Drill down criteria before changing the measure.)

Appetizer #2: Creating basic Analyses from scratch

In the first lesson we concentrated on the basic analysing techniques, based on existing analyses.

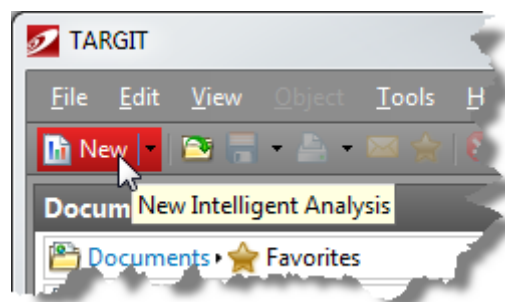
In fact, the first lesson would be quite close to what most TARGIT end-users would be challenged within their daily work with the TARGIT client: opening existing analyses, applying criteria to these analyses, and finally reading the data from these analyses in order to make proper decisions.

In this second lesson, we will take it one step further. The demo will demonstrate how to create a new analysis from scratch. The basic object is the cross table which is capable of working with multiple measures and multiple dimensions.

In the demo we will further examine the options for changing the cross tab into different graphical objects as well as some other formatting options.

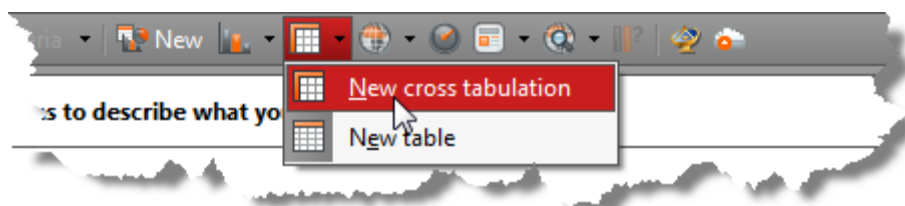
Defining a new analysis

To start the definition of a new analysis, you should click the *New* button in the tool bar. This will automatically close the currently opened analysis (asking to save it, if necessary).

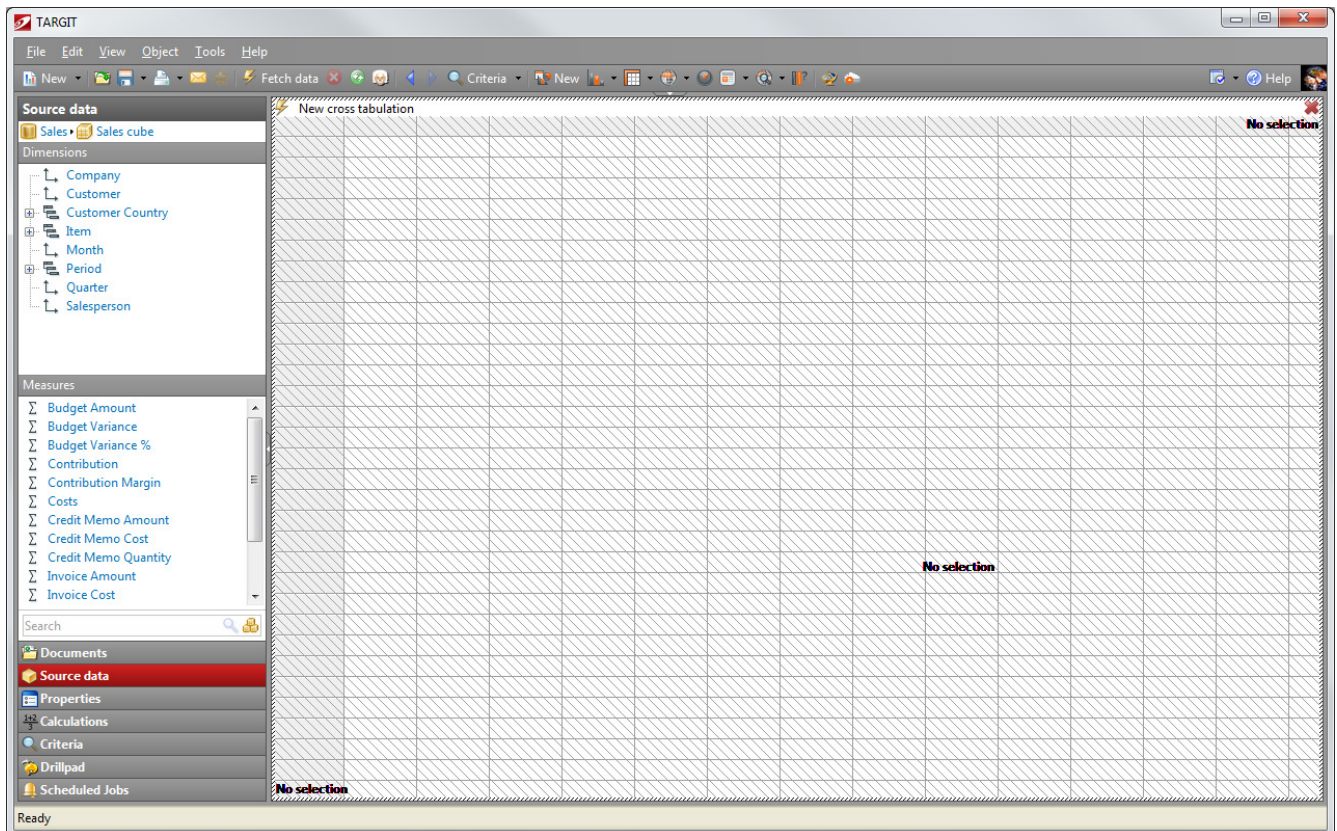


First we will need to add an object to the Working area of the client. Objects may be added from the Object menu or from one of the Object buttons on the tool bar. The Object buttons are: *Object* (chart objects), *Tables*, *Maps*, *Gauges* and *Layout objects*.

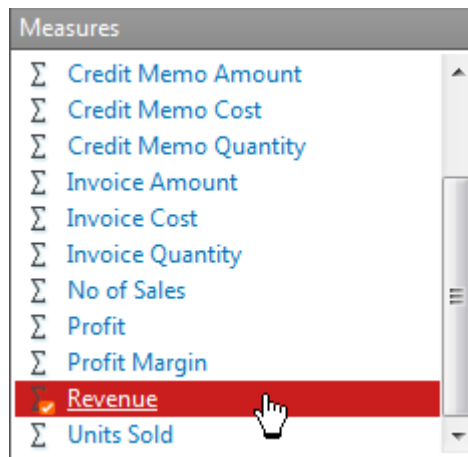
We will at first add a Cross tabulation object.



The added object will be displayed in the Working area as a currently undefined object of the chosen type.



To define the content of the object we must pick measures and dimensions from the *Source data* Smartpad.



Measures and dimensions may be added to the objects in three different ways:

Single click any measure or dimension to add it into its most appropriate place in the object.

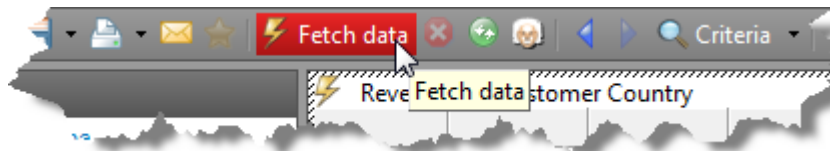
Right click any measure or dimension and select *Add to object* to add it into its most appropriate place in the object.

Drag and drop it into its most appropriate place in the object.

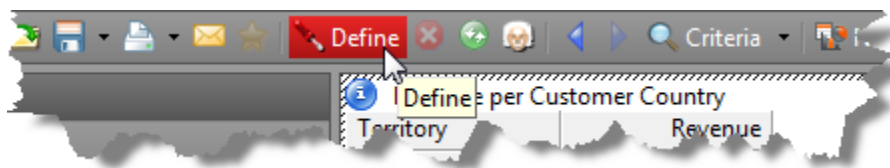
Use similar methods to remove measures and dimensions from the object.

Measures and dimensions that has already been added may be rearranged or re-localized by dragging them from one location to another in the object.

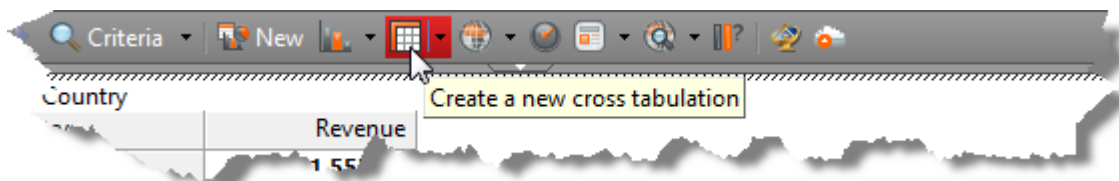
When all desired measures and dimensions have been added to an object, it is time to see the resulting data. This is done by clicking the *Fetch data* button in the tool bar.



Notice that the *Fetch data* button will now toggle to a *Define* button. Clicking the *Define* button will switch the object back to Definition mode.



To add more objects, e.g. another cross tab to the analysis, simply add it from the tool bar.



Re-arranging objects

When inserting new objects into an analysis they always try to split the available space equally between them. And their default location is determined according to the sequence in which they are inserted.

To change the way the objects are arranged you may grab any object by its *title*. When you start dragging the grabbed object around the Working area you will a number of *Drop arrows* appear.

Point the cursor to one of the *big* Drop arrows to place the object on top, on bottom, to the right or to the left of *all* the other objects.

Point the cursor to one of the *small* Drop arrows to place the object on top, on bottom, to the right or to the left of *relatively* to one of the other objects.

The screenshot shows the TARGIT software interface. On the left, there is a 'Source data' pane with a tree view of dimensions (Company, Customer, Customer Country, Item, Month, Period, Quarter, Salesperson) and measures (Credit Memo Amount, Credit Memo Cost, Credit Memo Quantity, Invoice Amount, Invoice Cost, Invoice Quantity, No of Sales, Profit, Profit Margin, Revenue, Units Sold). Below this is a search bar and a list of documents, source data, properties, calculations, criteria, drillpad, and scheduled jobs.

The main workspace contains two tables:

Revenue per Customer Country			Revenue	
Territory	Country			
Total			182.541.552,13	
Asia	Total		44.397.608,43	
	Japan	+	18.435.672,47	
	Malaysia	+	25.961.935,96	
Europe	Total		106.447.336,78	
	Denmark	+	13.235.609,57	
	France	+	14.881.382,91	
	Germany	+	14.270.870,29	
	Italy	+	19.969.281,21	
	Norway	+	4.482.165,59	
	Portugal	+	7.754.917,22	
	Spain	+	18.856.018,69	
	Sweden	+	6.094.000,76	
	United Kingdom	+	6.903.090,56	
North America	Total		31.696.606,91	

Revenue per Item by Period									
	Total	+	2009	+	2010	+	2011	+	2012
Total	182.541.552,13		42.522.381,43		35.325.020,66		47.772.998,96		56.921.151,07
JEANS	95.985.048,79	+	23.085.042,07	+	18.392.548,31	+	24.462.422,75	+	30.045.035,66
SHIRTS	29.135.231,01	+	6.372.008,64	+	6.068.537,30	+	7.528.146,65	+	9.166.538,42
T-SHIRTS	56.980.758,96	+	12.828.063,92	+	10.791.118,05	+	15.703.081,00	+	17.658.495,99
UNDERWEAR	440.513,37	+	237.266,80	+	72.817,00	+	79.348,57	+	51.081,00

The interface also features several large blue arrows (up, down, left, right) for re-arranging objects and smaller arrows for relative positioning. A mouse cursor is visible over the 'UNDERWEAR' row of the second table.

The relative size of an object may also be adjusted by dragging the *border* between two objects.

Finally, *double clicking the title* will maximize the object to the whole Working area. Double click the title again to restore it to its original size.

The three tables may be formatted using several formatting options.

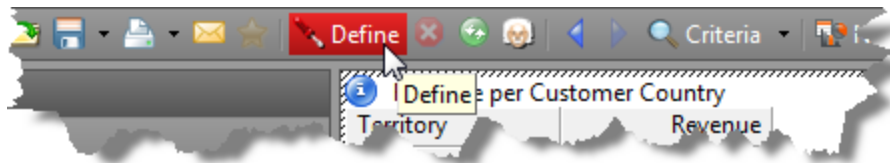
In general, all table formatting options are available when right clicking the table and then, from the context menu, selecting the *Table* sub menu.

Re-defining objects

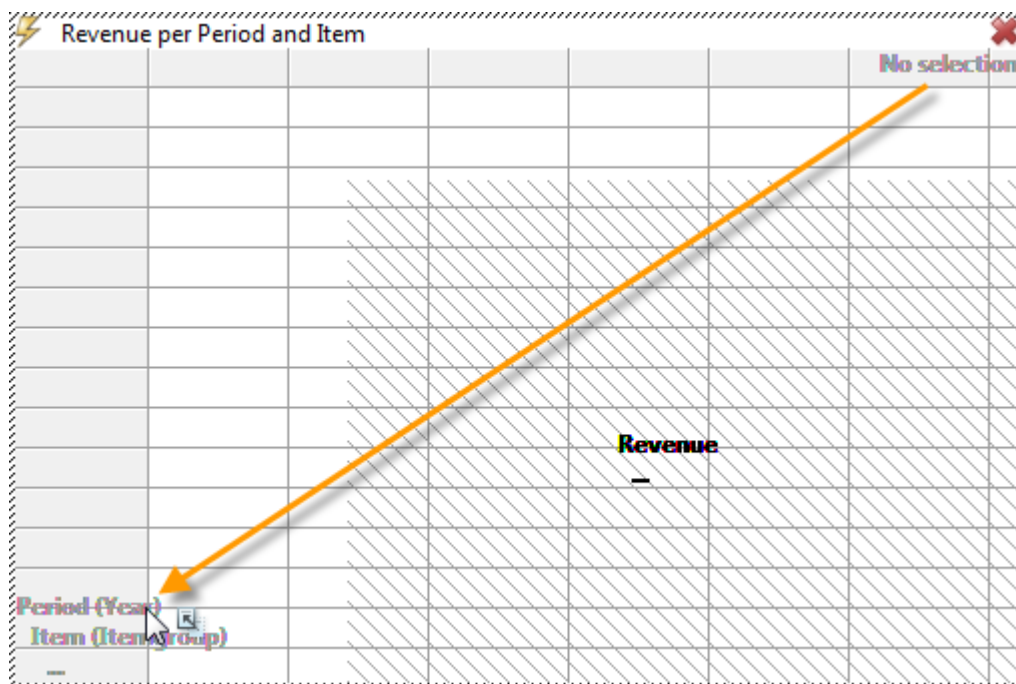
The second cross table is an example of a table with dimensions on *both* axes. By default, when using the double click method to apply dimensions to a cross table, the first dimension is added to the vertical axis, the second dimension is added to the horizontal axis etc.

The dimensions may have been added to the axis of your choice by dragging them into the table instead.

Click the *Define* button in the tool bar to re-define the source data, including placement of dimensions on the axes, of the cross table.



When dragging one dimension from one axis to another it does not change the data in the cross table. It only changes the way it is being presented in the cross table.

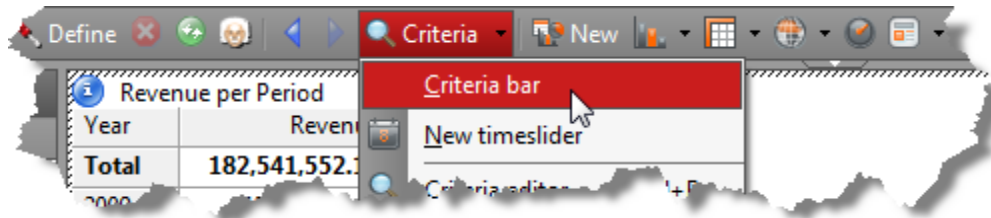


Fetch data to see the changes.

Criteria Bar

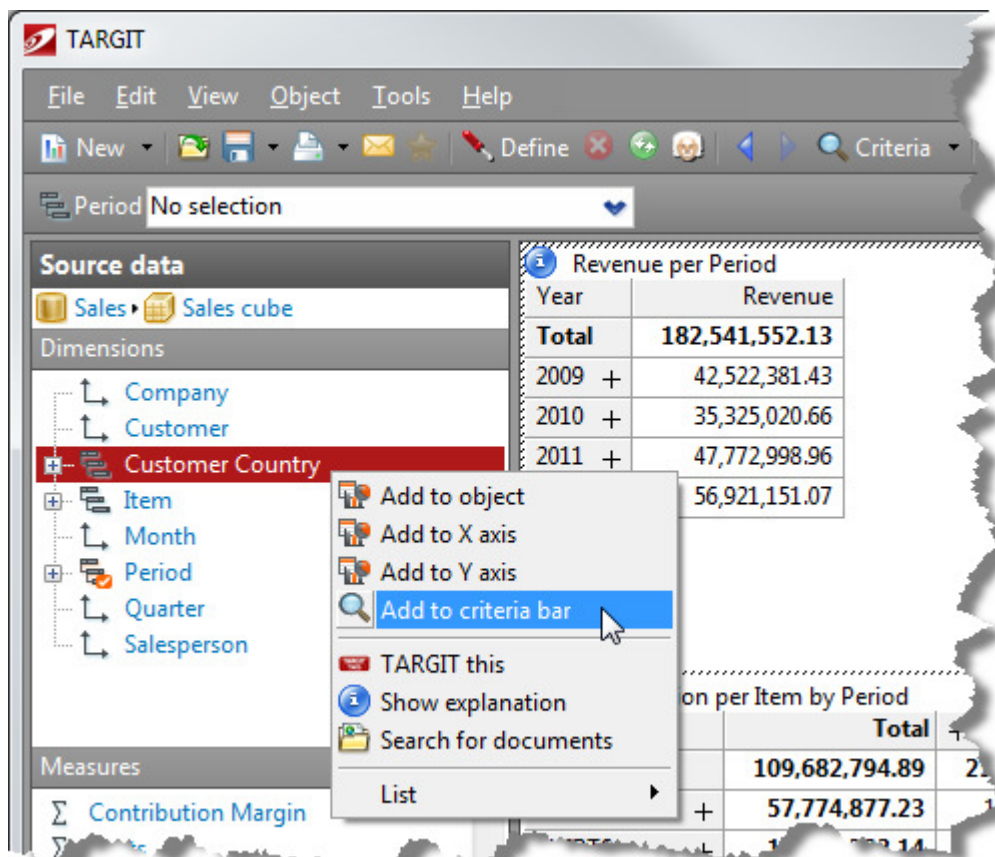
To be able to work with global criteria from a Criteria bar, you must first add a Criteria bar to the analysis.

This can be done by clicking the Criteria button on the tool bar.



Once the Criteria bar has been added you may start adding dimensions to it. Go to the Source data Smartpad and simply drag and drop dimensions to the Criteria bar.

Alternatively, right click any dimension and select *Add to criteria bar*.



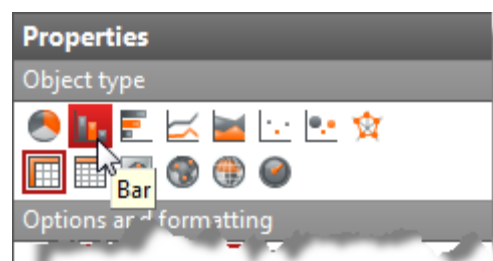
Selecting a different object type

To demonstrate this, we would start out by adding a new cross table:

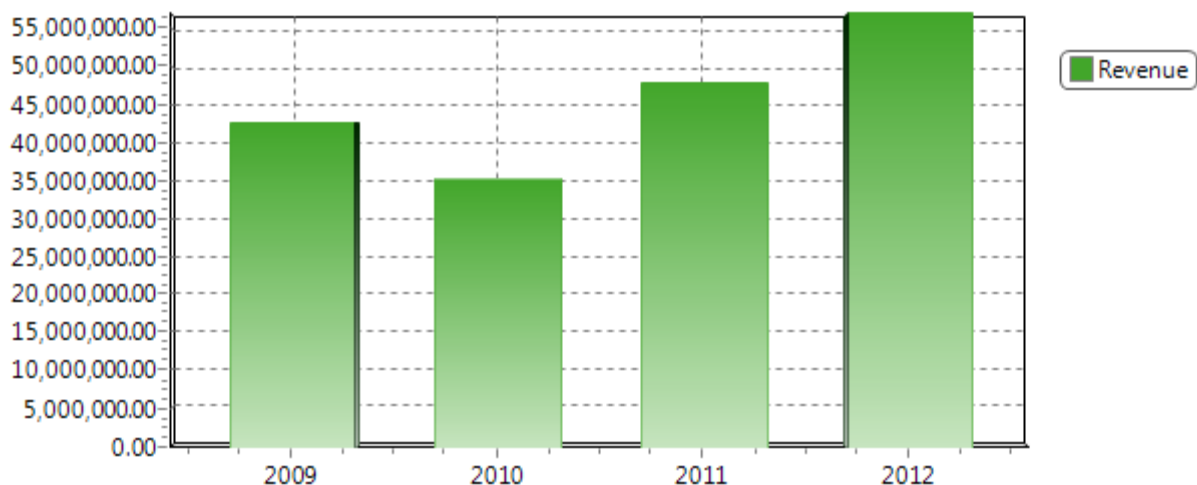
Revenue per Period	
Year	Revenue
Total	182,541,552.13
2009 +	42,522,381.43
2010 +	35,325,020.66
2011 +	47,772,998.96
2012 +	56,921,151.07

Even though the object has initially been created as a cross table, you can easily change it into e.g. a graphical object type.

This may be done via the Properties Smartpad.



Graphical objects, when applicable, are often much better and quicker at giving a visual overview of your data.



Notice that some objects can work with just a single measure, while others need to be defined by multiple measures and/or multiple dimensions in order to work properly.

Graphical formatting options

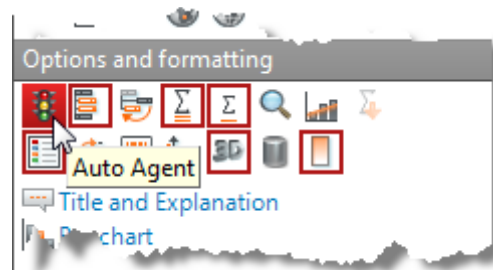
Depending on the chosen object type and the number of measures and/or dimensions you have various graphical formatting options.

Some of the most common graphical formatting options will be mentioned here. All options are available from the Properties Smartpad.

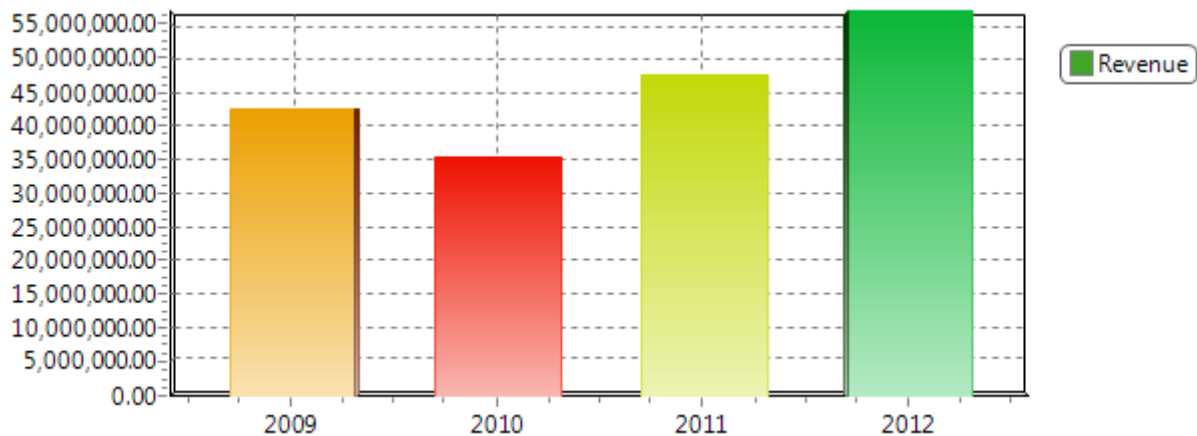
Automatic Coloring

The Automatic colouring agent has three modes:

- First click will apply a coloring agent that will color the lowest values red and the highest values green. Values in between minimum and maximum will be gradually colored reddish through greenish.
- Second click will invert the color scale, coloring the highest values red and the lowest values green.
- Third click will disable the coloring agent and bring the coloring back to its initial color.

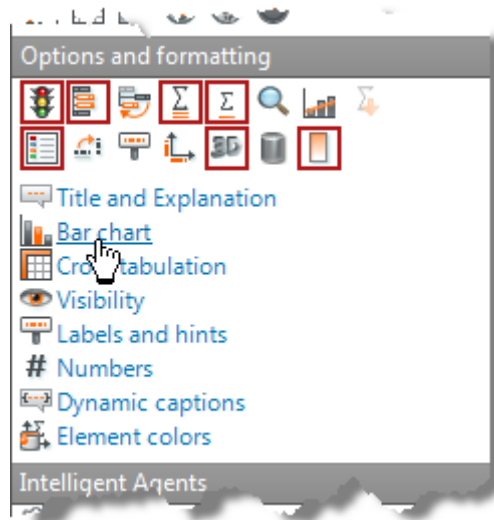


The Automatic colour agent is often used on bar charts and maps.

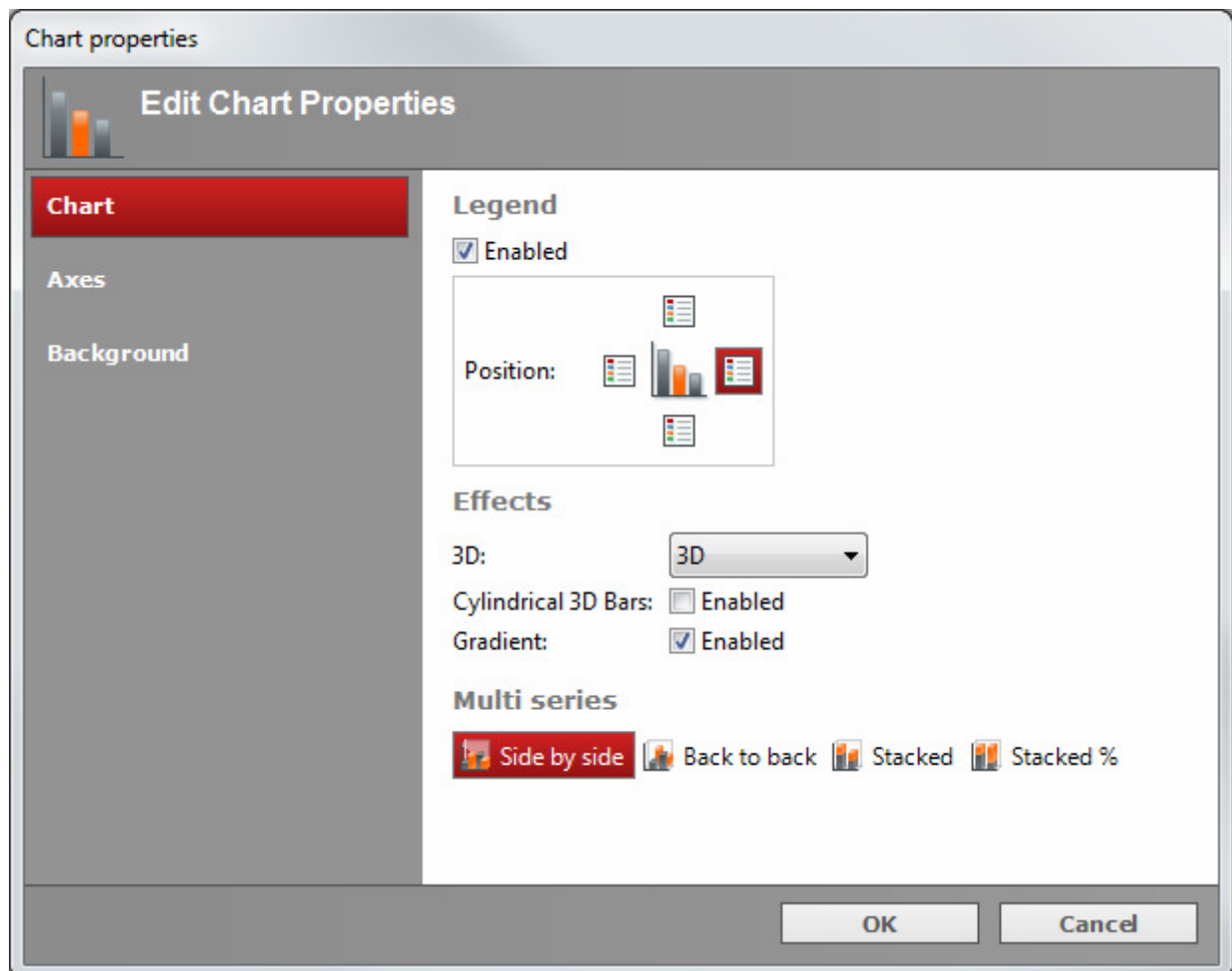


Bar chart options

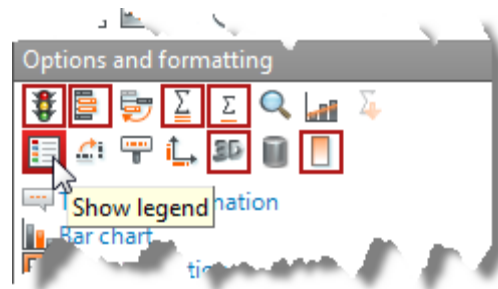
When working with a graphical object, such as a bar chart, you have additional formatting options from the *Options and formatting* section in the Properties Smartpad.



For a bar chart, the chart properties dialogue box will look like this:



Most of the options in the chart properties dialogue box are also available as shortcuts directly in the Properties Smartpad. If in doubt about one of the shortcuts, simply place the mouse cursor on top of the shortcut to see a small explanation.

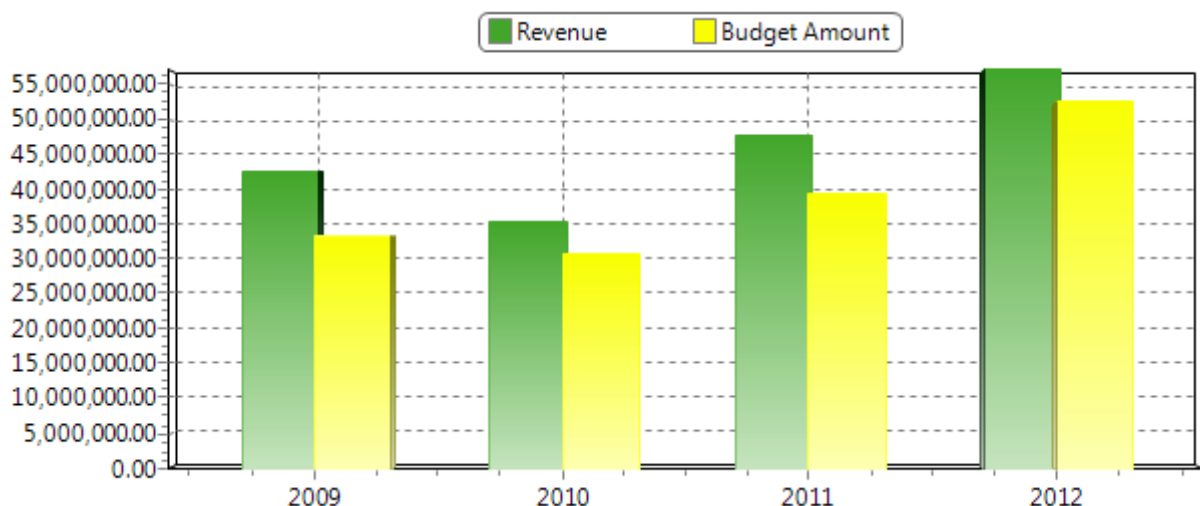


All of these shortcuts will *toggle* the state of the property. While most states will be simple enabled / disabled states, a few shortcuts will toggle between multiple states more than two.

The *legend* is mostly relevant when looking at multiple series of data. If you are looking at just a single measure in a bar chart, you would probably want to disable the legend, e.g. by clicking the *Show legend* shortcut.

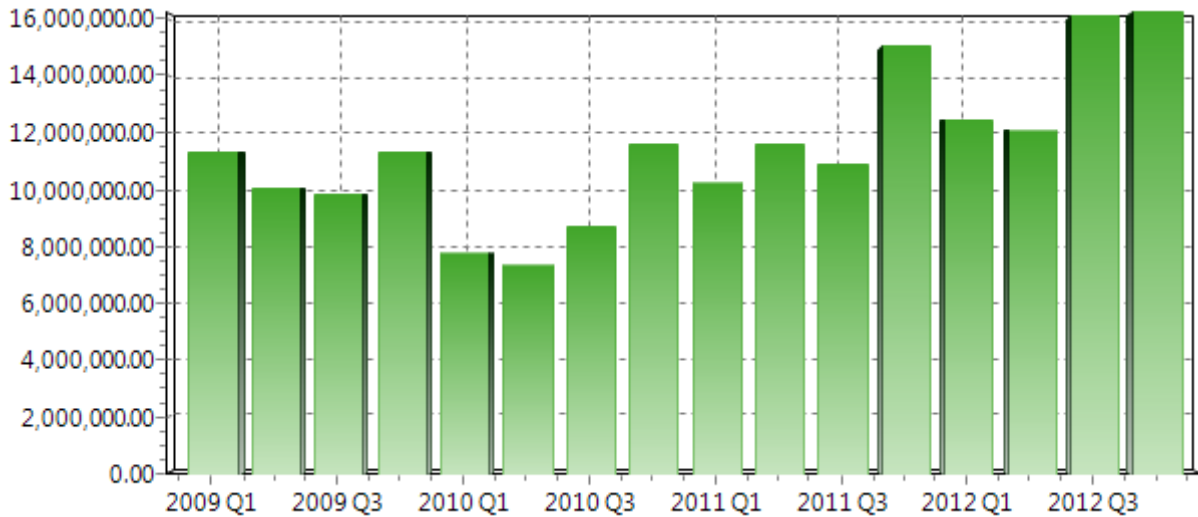
For the following screen shot we have:

- Added a second measure to bar chart: the *Budget Amount* measure.
- Enabled *Show legend*.
- Changed the position of the legend to be on top of the chart (via the bar chart properties dialogue box).
- Disabled automatic colouring.

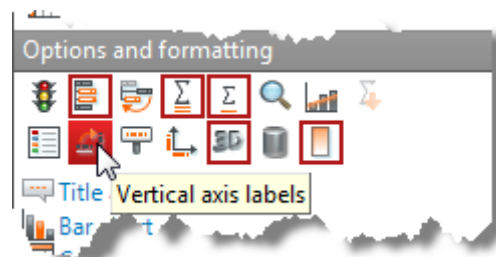


Vertical X-axis labels

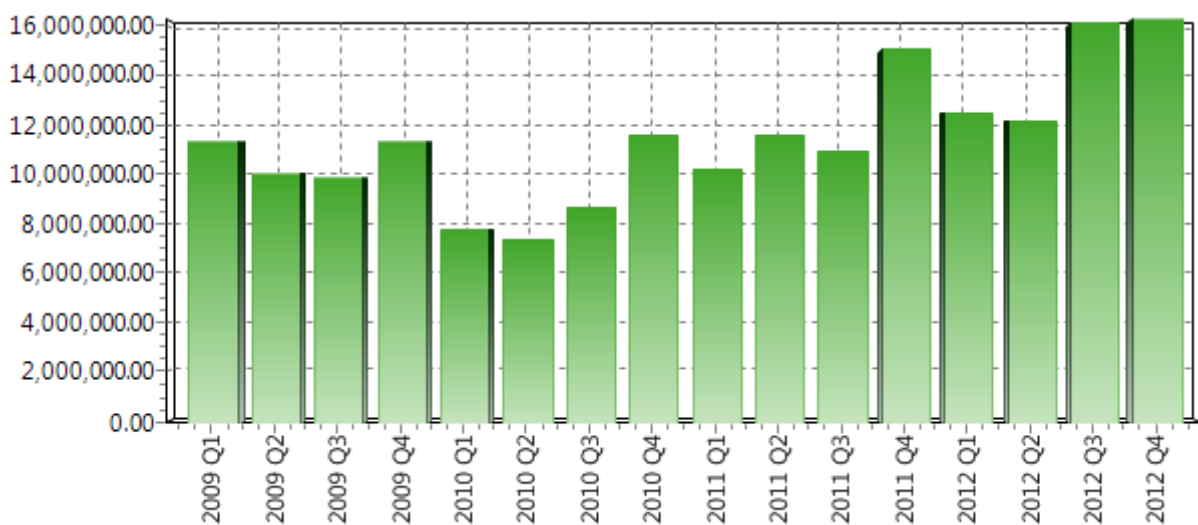
First, remove the Budget Amount measure and the legend from the bar chart and then expand the Period dimension to the Quarter level in the bar chart. Notice that only every second or so X-axis label is visible.



Use this option to rotate the X-axis labels 90 degrees. This is sometimes necessary in order to display all the necessary dimension labels on the X-axis.



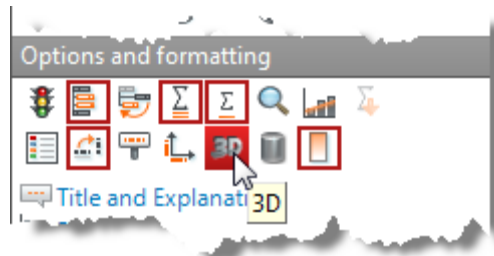
The bar chart, now with vertical X-labels:



3D perspectives

Some of the graphical object types are initially formatted with a certain 3D perspective that furthermore may be rotated.

To rotate an object, hold down the right mouse button while dragging the object.

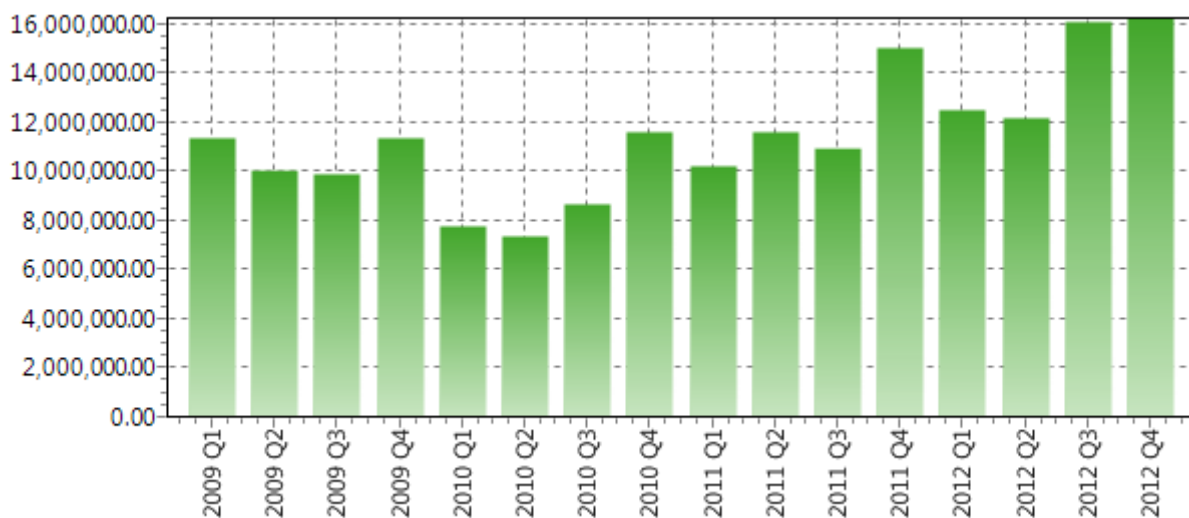


The 3D formatting option has three modes:

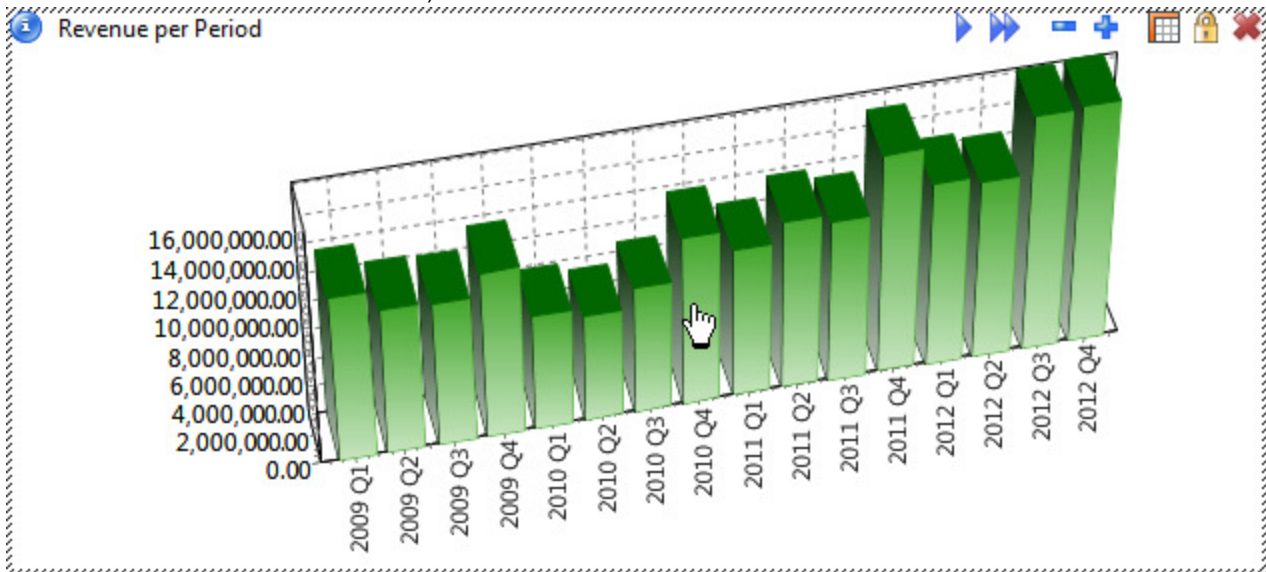
First click will change the perspective into a *fixed 3D* perspective that cannot be rotated.



Second click will change the object into a *flat 2D* presentation that quite often is more suitable when reading data points.



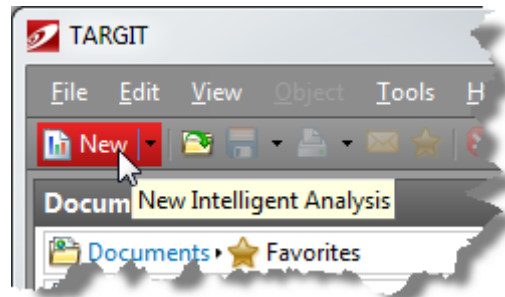
Third click will change it back to its initial, rotatable 3D mode. Right-click and hold down the right mouse button while dragging, and you will be able to customize the viewing angle. Use the scroll wheel of your mouse to zoom in and out. (Use keyboard arrows and plus and minus keys as an alternative to the mouse.)



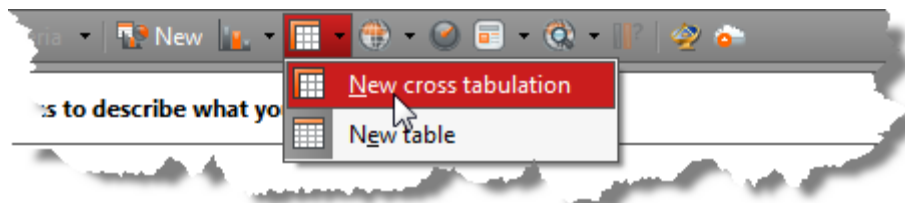
Exercises:

1)

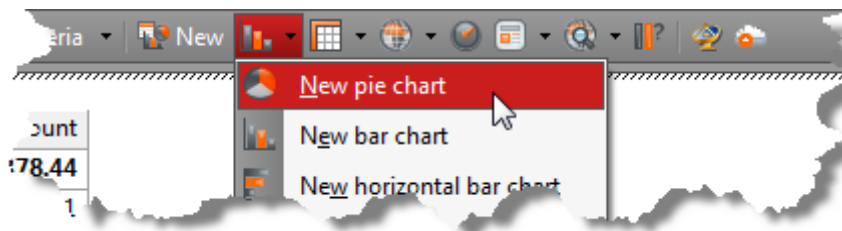
Create a new analysis, based on the Sales Cube.



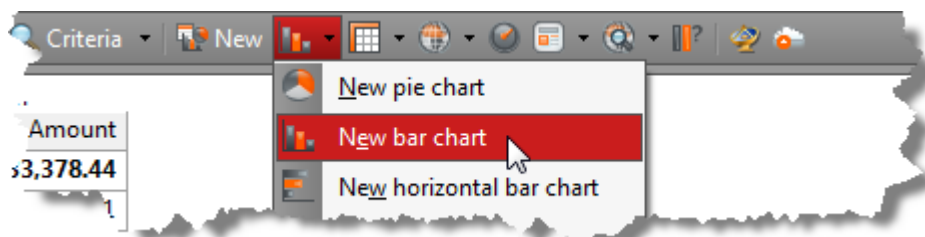
Add a Cross Table: Invoice Amount per Item.



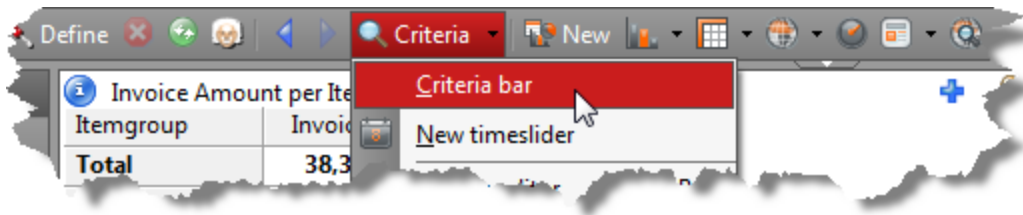
Add a Pie Chart: Invoice amount per Salesperson.



Add a Bar Chart: Invoice Amount and Budget Amount per Period.

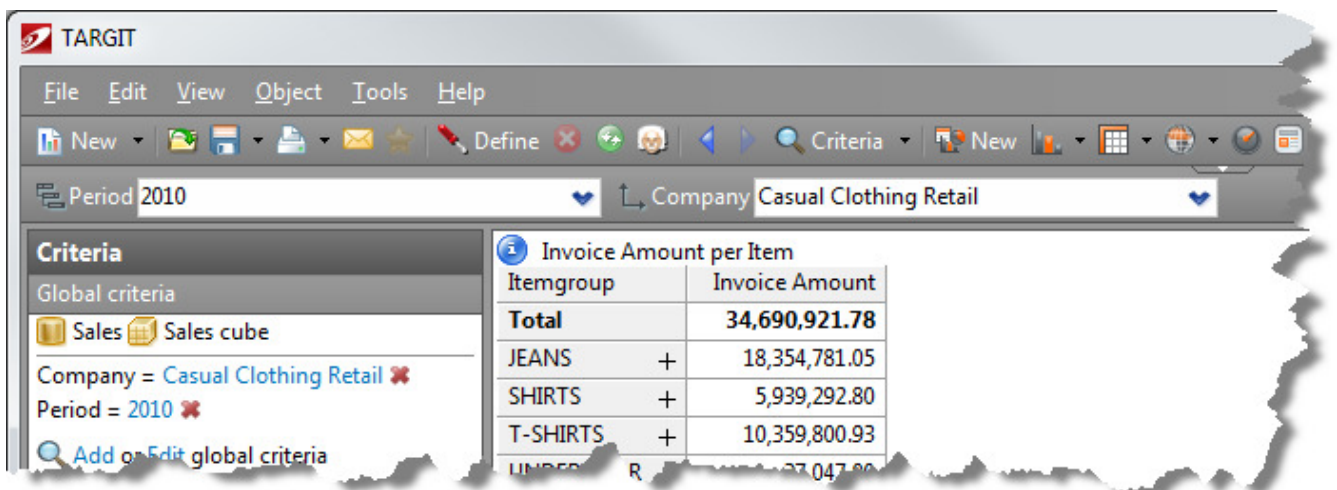


Add a Criteria Bar and drag the **Period** dimension and the **Company** dimension to this bar.

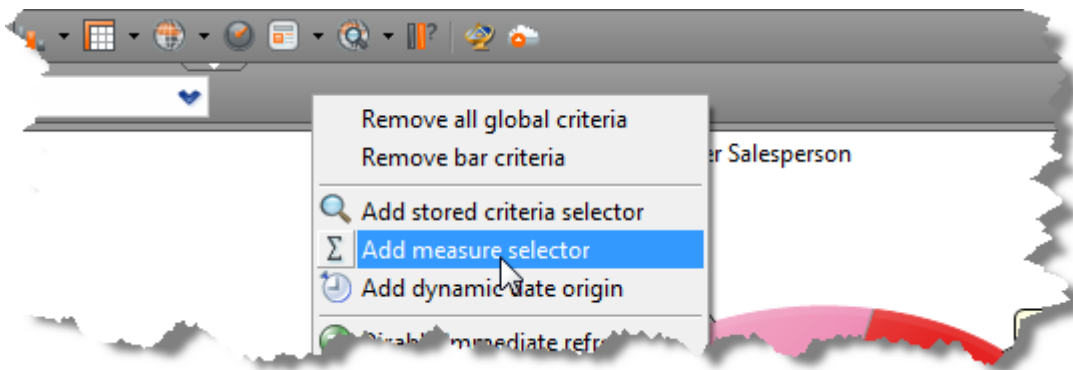


Apply the following global criteria:

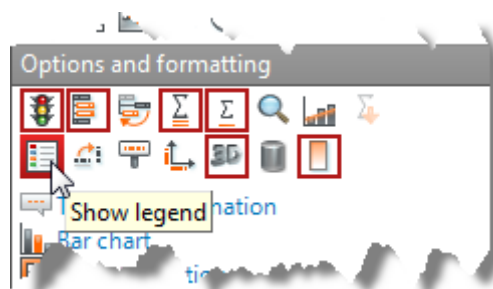
- **Period = 2010**
- **Company = Casual Clothing Retail**



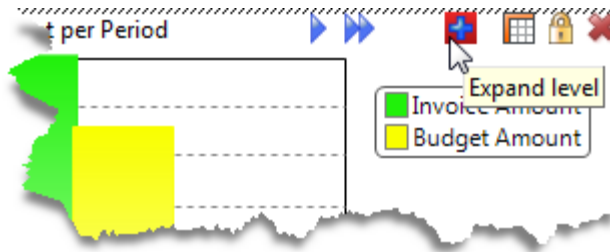
Add a Measure selector to the Criteria bar (right click the Criteria bar).



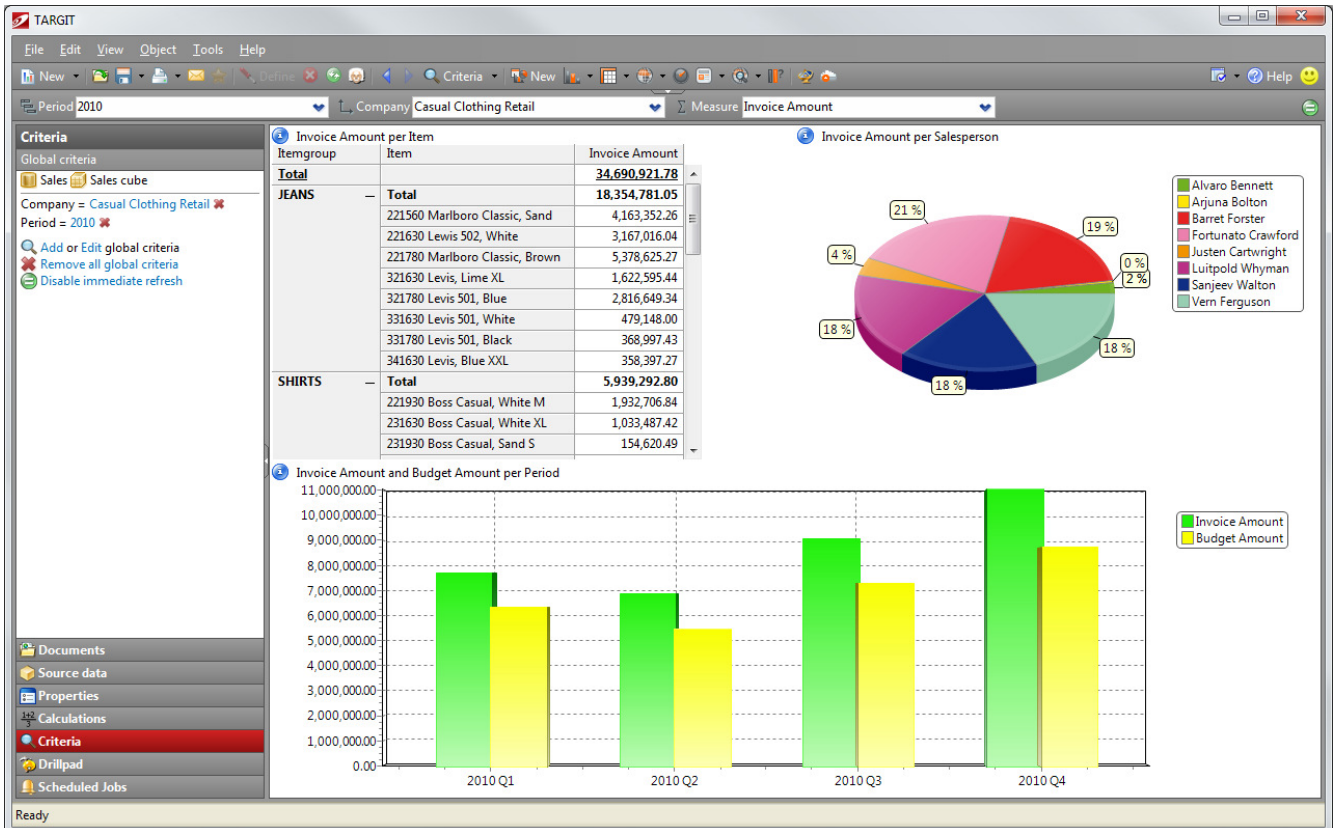
Add a legend to the bar chart.



Expand the hierarchical dimensions in the cross tabulation as well as in the bar chart.



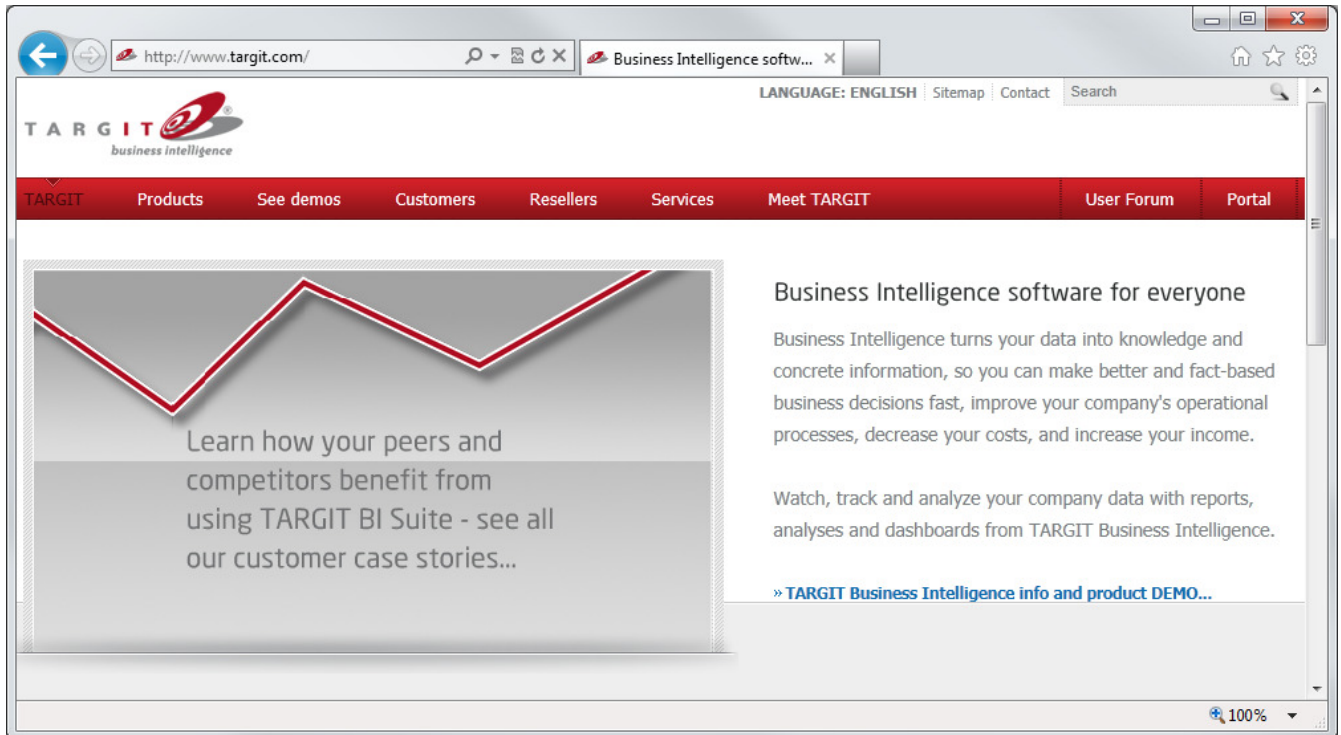
The final result should now look something like this:



Save the analysis in your Personal folder as My first TARGIT analysis.

Further Inspiration

Please visit the TARGIT Web site www.targit.com for further inspiration.



From the Web site you may be further inspired by:

- Reading about all the other exciting features of the TARGIT BI Suite.
- Watching short product demo videos.
- Reading customer case stories.
- Signing up for Monthly Webinars.

... and much more!



