

# ProClarity® Analytics 6

## *ProClarity Professional 6.3 Getting Started Guide*

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# Table of Contents

Acknowledgements .....	2
<b>Introducing ProClarity Professional.....</b>	<b>5</b>
About this Getting Started Guide .....	5
ProClarity Professional versions .....	5
Other help sources .....	5
Online help .....	5
Getting Started Tutorial .....	6
Technical support .....	6
Training services .....	6
Contact us .....	6
<b>Chapter 1: Getting Started .....</b>	<b>7</b>
Starting Web Professional .....	7
Starting Desktop Professional .....	8
Opening a cube .....	10
Opening a Briefing Book .....	11
ProClarity Professional screen details .....	12
<b>Chapter 2: Creating Queries .....</b>	<b>13</b>
What is a query? .....	13
About cube data .....	13
The relevant data .....	14
The data layout .....	16
Displaying the Setup Panel .....	17
Creating a query .....	18
Selecting items in the Select Items tab .....	19
Arranging hierarchies in the Hierarchies tab .....	21
Applying changes to the query .....	21
Slicing Background hierarchies .....	21
Showing a combined value .....	22
Other Setup Panel features .....	23
<b>Chapter 3: Creating Measures, Members, and Sets .....</b>	<b>25</b>
Creating measures .....	25
Creating members .....	26
Creating sets .....	27
Using other ProClarity tools to create items .....	27
Sharing items .....	28

<b>Chapter 4: Exploring Data with Charts and Grids.....</b>	<b>29</b>
Displaying a chart or grid view .....	29
Drilling down .....	30
Drilling up .....	32
Using other navigation features .....	32
Pivoting hierarchies .....	33
Using actions .....	33
<b>Chapter 5: Filtering and Sorting Data .....</b>	<b>35</b>
Filtering data .....	35
Understanding how to filter based on columns.....	36
Sorting data .....	38
Understanding peer groupings.....	39
<b>Chapter 6: Exploring Data with Other View Types .....</b>	<b>41</b>
Finding root cause: Decomposition Tree .....	41
Creating a Decomposition Tree .....	42
Working with a Decomposition Tree .....	43
Using ratios of size and color to make comparisons: Performance Map .....	43
Creating a Performance Map .....	44
Working with a Performance Map .....	45
Analyzing large volumes of data: Perspective view .....	45
Creating a Perspective view .....	46
Working with a Perspective view .....	47
Displaying Web content: Internet Explorer view .....	47
<b>Chapter 7: Saving and Sharing Your Views.....</b>	<b>49</b>
Creating a Briefing Book .....	49
Saving a Briefing Book .....	50
Saving personal views .....	51
Other Briefing Book features .....	51
<b>Appendix: Installing Your Application .....</b>	<b>53</b>
Software .....	53
Browser (Web Professional and Web Standard).....	53
User privileges .....	54
Installing Web Professional .....	54
Installing Desktop Professional .....	56

# Introducing ProClarity Professional

ProClarity Professional helps you understand the information you have about your customers, competitors, and business operations. Using familiar techniques and easy-to-use tools, you can explore your data to find root-cause, trends, and exceptions. Only by understanding such factors can you make intelligent business decisions for the most profitable outcome.

As you explore data, you often want to share your findings with others. With ProClarity Professional, you can share analysis results and business logic within a secure Web environment.

## About this Getting Started Guide

This *Getting Started Guide* is intended for new users and users who need a refresher of the basics. Its purpose is to help you create analytic views in ProClarity Professional.

## ProClarity Professional versions

The *Getting Started Guide* describes how to use ProClarity Professional, which is available in two versions:

- ProClarity Desktop Professional (Desktop Professional). Runs as a stand-alone application.
- ProClarity Web Professional (Web Professional). Runs within a browser.

The features described in this guide are available in both versions of ProClarity Professional.

## Other help sources

In addition to the *Getting Started Guide*, you can consult the following help sources.

### Online help

ProClarity Professional online help contains topics to guide you through tasks you can perform in ProClarity Professional. To access online help from ProClarity Professional, select **Help > Contents**.

## Getting Started Tutorial

The Getting Started Tutorial teaches the basics of using ProClarity Professional. To access the tutorial, select **Help > Getting Started Tutorial**.

## Technical support

For technical assistance in using and configuring ProClarity products, please contact ProClarity Technical Services by visiting our Web site at <http://www.ProClarity.com> or by calling (208) 344-1630.

## Training services

ProClarity University offers training classes with an interactive, hands-on approach to ensure that the attendees get the most out of their training time.

The ProClarity training curriculum and materials can be customized with your applications and environment in mind. To learn more, visit the ProClarity University Web site at <http://www.proclarity.com/training>.

## Contact us

ProClarity Corporation  
PO Box 8064  
500 South 10th Street  
Boise ID 83707

Phone: (208) 344-1630  
Fax: (208) 343-6128  
For information, contact [info@proclarity.com](mailto:info@proclarity.com)  
For sales, contact [sales@proclarity.com](mailto:sales@proclarity.com)

ProClarity International  
PO Box 366  
5240 AJ Rosmalen  
The Netherlands

Phone: +31 (73) 681.0800  
Fax: +31 (73) 681.0801  
For information, contact [info-int@proclarity.com](mailto:info-int@proclarity.com)  
For sales, contact [sales-int@proclarity.com](mailto:sales-int@proclarity.com)

# Chapter 1: Getting Started

The data you analyze in ProClarity Professional comes from a data source called a “cube.” When you start ProClarity Professional and connect to a cube, the cube data displays in analytic views such as charts and grids.

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## In this chapter

- Starting Web Professional
  - Starting Desktop Professional
  - Opening a cube
  - Opening a Briefing Book
  - ProClarity Professional screen details
- 
- 

## Starting Web Professional

Web Professional is the version of ProClarity Professional that runs in a browser.

- 1 Open your Web browser and type the URL for Analytics Server, as in the following examples:
  - <http://production/pas>
  - <https://www.yourcompany.com/pas>You may be prompted to type your user name and password to log in to the server. Typically, these are your network credentials.
- 2 On the Contents page (Figure 1), select **Professional** from the **ProClarity** drop-down menu. If this option is not available, contact your Analytics Server administrator.
- 3 In the right-hand pane, click a library, a Briefing Book, and then a page. Web Professional opens in its own browser window.

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### NOTE

Running Web Professional in more than one browser window at a time is not supported. Because of its tabbed interface, Internet Explorer 7.0 users may be more likely to encounter related problems.

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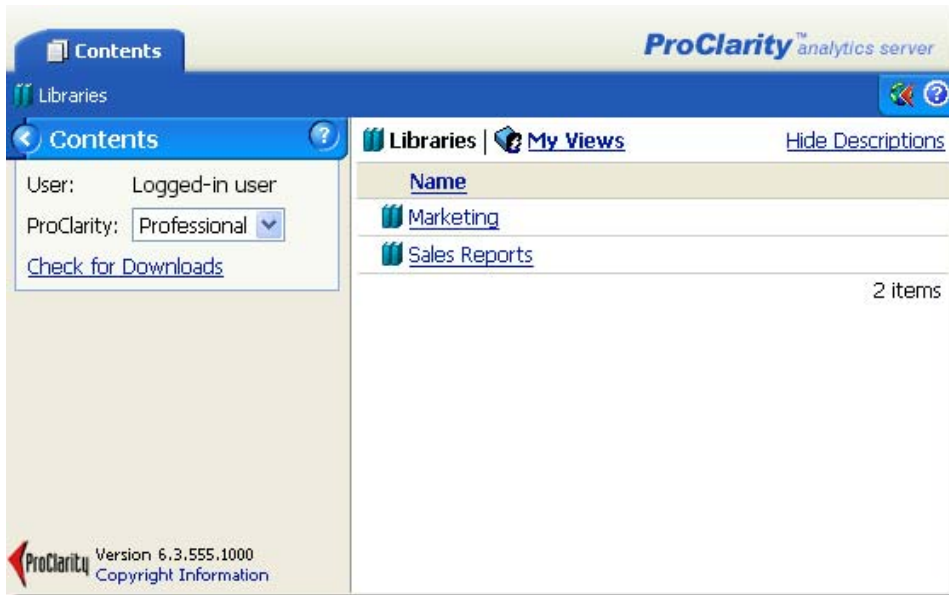


Figure 1. The Contents page displaying two libraries

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**NOTE**

If the Download Components page appears, you may need to install Web Professional. See “Installing Web Professional” on page 54.

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## Starting Desktop Professional

Desktop Professional is the version of ProClarity Professional that runs as a stand-alone application.

- From the Windows **Start** menu, select **Programs > ProClarity > ProClarity Desktop Professional**.

Typically, the Welcome screen (Figure 2) appears when Desktop Professional opens.



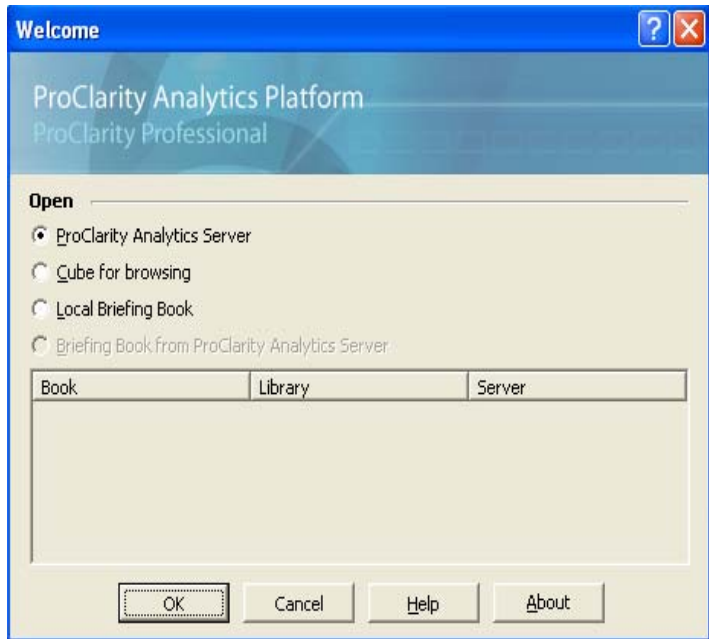


Figure 2. Desktop Professional Welcome screen

- In the Welcome screen, select one of the following options and click **OK**.
  - **ProClarity Analytics Server.** Select a library and a book.
  - **Cube for browsing.** Connect to a data source and select a cube. (See “Opening a cube” on page 10.)
  - **Local Briefing Book.** Select a book saved locally or on the network.
  - **Briefing Book from ProClarity Analytics Server.** Select a Briefing Book from the list of previously opened books.

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**NOTE**

You may be required to log in to Analytics Server. In the Log in dialog box, type the server name. Click **Security** to type your user name and password.

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## Opening a cube

In order to see data in ProClarity Professional, you must connect to a cube on an OLAP server. If you are not already connected to a server, or if you want to analyze data from a different server, you first need to open a connection.

### To connect to an OLAP server

- 1 From the **File** menu, select **Open Cube**.  
If the Open Cube dialog box appears, click **Connect**.
- 2 In the Connect dialog box (Figure 3), type the name of the OLAP server that stores the cube you want to open.

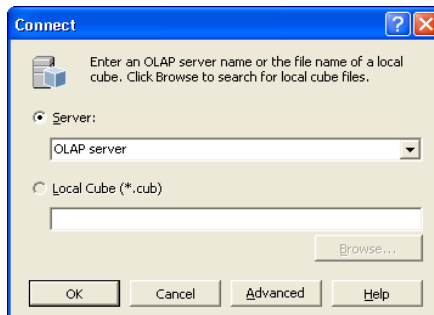


Figure 3. Connect dialog box

- 3 Click **OK**.  
The Open Cube dialog box appears (Figure 4).

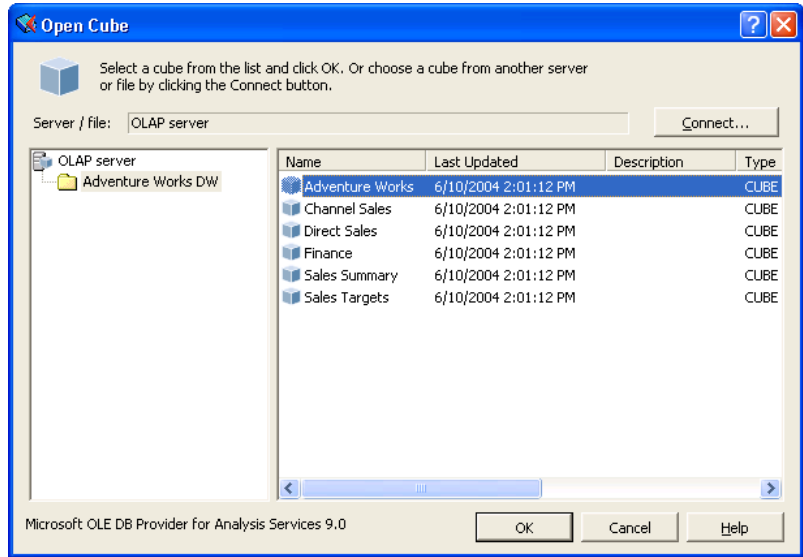


Figure 4. Open Cube dialog box

### To open a cube

- 1 In the left pane of the Open Cube dialog box, select a catalog.
- 2 In the right pane, double-click a cube.
- 3 In the dialog box that appears, select a view type.

The cube data displays in ProClarity Professional using the view type that you selected.

## Opening a Briefing Book

Briefing Books are collections of saved views, or “pages,” that reference cube data. Only one Briefing Book can be open at a time.

### To open a Briefing Book

- To open a book saved locally or on the network, select **File > Open Book**. Browse to the location of the book (.bbk file) and double-click the file.
- To open a book published to Analytics Server, select **File > Analytics Server > Retrieve Book**. Click a library and then double-click a book.

The pages in the book display as a list in the left pane in ProClarity Professional.

**NOTE** You may be prompted to log on to Analytics Server. In the Log in dialog box, type the server name. Click **Security** to type your user name and password.

## ProClarity Professional screen details

Figure 5 identifies screen areas of ProClarity Professional.

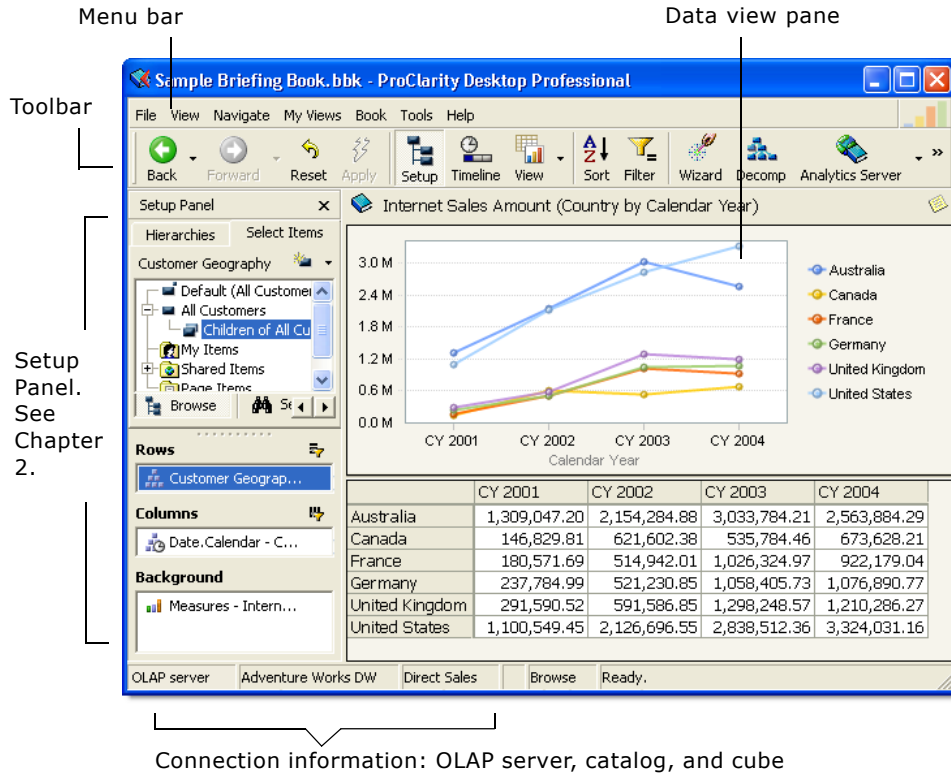


Figure 5. ProClarity Professional screen details

In the following chapters, you will learn how to use ProClarity Professional to create analytic views.

## Chapter 2: Creating Queries

In ProClarity Professional, you learn about your business by arranging data to create queries. The Setup Panel is one tool you can use to create queries.

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### In this chapter

- What is a query?
  - Displaying the Setup Panel
  - Creating a query
  - Slicing Background hierarchies
  - Other Setup Panel features
- 
- 

### What is a query?

A query is a request for information about cube data. For example, you can ask to see revenue for all products for the past year.

### About cube data

Cube data is organized into measures and hierarchies:

- **Measures.** Quantitative values such as Sales Dollars, Number of Product Failures, Gross Margin, and Average Inventory Level.
- **Hierarchies.** Categories describing the who, what, when, or where of a measure. Examples include Geographic Region, Product Categories, and Date.Fiscal. Hierarchies consist of members, which may be organized into several levels.

The following is an example of a Time hierarchy that contains three levels: Year, Quarter, and Month:

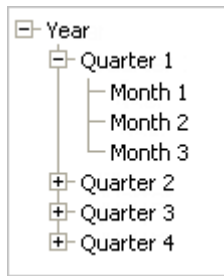


Figure 6. Time hierarchy

In ProClarity Professional, you select measures and members to define a set of relevant data, and then you arrange the data to find trends, exceptions, and opportunities.



**Tip**

---

For help with creating a query, click the **Wizard** toolbar button to open the Ad Hoc Query Wizard.

---

## The relevant data

The items selected in a query determine the data that displays in a view. The following two views have different members selected on Rows. In Figure 7, the first view displays data for All Products. The second view displays data for the Bikes category only.

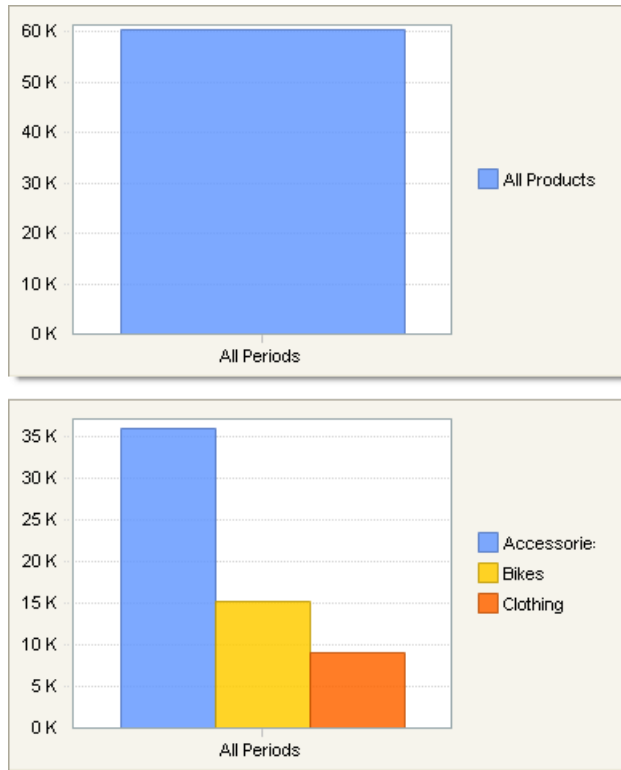


Figure 7. Views with different selections

### Selecting items in the Background

Background selections also affect the data that displays in a view. For example, if Quarter 1 is selected in the Background, only data for Quarter 1 is displayed. Selecting a different member in the Background causes values on Rows and Columns to update with new data.

The following views demonstrate how changing a Background selection affects the grid values. In the first view, Canada is selected in the Background. In the second view, France is selected.

Internet Sales Amount for Canada (Category by Calendar Year)			
	CY 2002	CY 2003	CY 2004
Accessories		43,618.92	59,758.93
Bikes	621,602.38	471,445.47	581,424.73
Clothing		20,720.07	32,444.55

Internet Sales Amount for France (Category by Calendar Year)			
	CY 2002	CY 2003	CY 2004
Accessories		25,985.48	37,421.30
Bikes	514,942.01	987,840.19	870,221.82
Clothing		12,499.30	14,535.92

Figure 8. Views with different Background selections

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**Tip** When multiple members are selected in a Background hierarchy, the members are used in a Slicer or as a combined value. See "Slicing Background hierarchies" on page 21 or "Showing a combined value" on page 22.

---

Even though the preceding views display different data, the layout is the same. By changing the layout, you can emphasize different comparisons or find the root-cause of trends and exceptions in your business operations.

## The data layout

The following two views have the same member selection but the hierarchies are arranged differently on Rows and Columns.

In Figure 9, note how each view compares data differently. The first view compares sales by product while the second view compares sales by year.



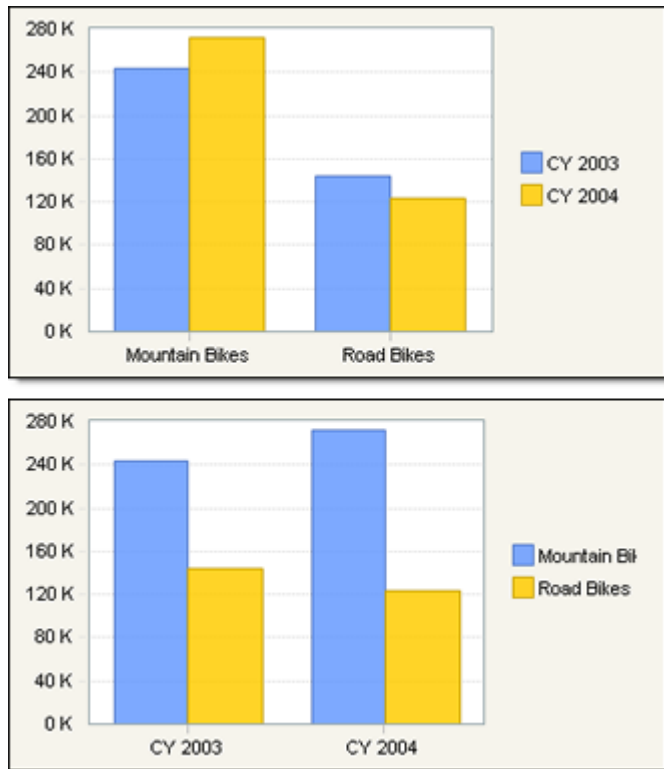


Figure 9. Views with different layouts

## Displaying the Setup Panel

You can select your data and arrange your query in the Setup Panel (Figure 10).

### To display the Setup Panel

- From the **View** menu, select **Setup Panel**.

The Setup Panel shows you the cube data that you can use in your queries. It contains two interactive tabs:

- In the **Hierarchies** tab, drag hierarchies to the Rows, Columns, and Background boxes to create the query layout. In this tab, you select which hierarchy displays in the **Select Items** tab.
- In the **Select Items** tab, select measures, members, and sets from the hierarchy tree to use in your query. You can also search for members.

Both tabs contain the Rows, Columns, and Background boxes that display the query layout.

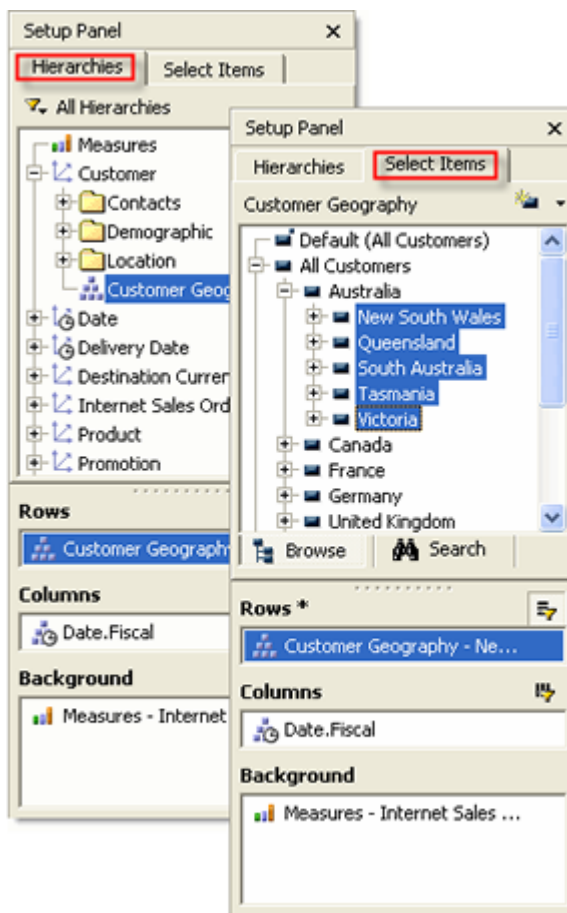


Figure 10. Setup Panel

## Creating a query

Creating queries in the Setup Panel consists of the following iterative processes:

- Selecting measures, members, and sets
- Arranging hierarchies
- Applying the changes

## Selecting items in the Select Items tab

The **Select Items** tab displays the items that belong to a hierarchy. In the hierarchy tree, you select the items that you want to use in the query. Figure 10 depicts part of a Products hierarchy tree in the **Select Items** tab.

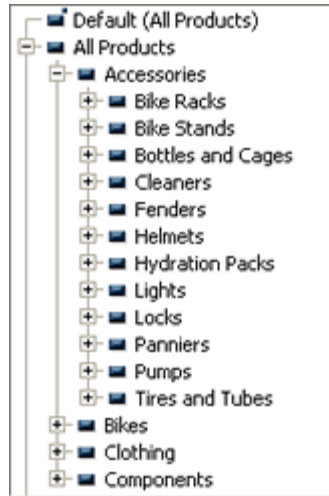


Figure 11. Hierarchy tree for Products


The tree provides the following information about the hierarchy:

- "All Products" is at the highest level in the hierarchy.
- "All Products" has four children at the second level: Accessories, Bikes, Clothing, and Components.
- Each category has children at the third level. In the example, Accessories has been expanded to show its children.

### To select items

- 1 In the **Hierarchies** tab, double-click a hierarchy to display its members in the **Select Items** tab.
- 2 In the **Select Items** tab, select measures, members, or sets.

Following are tips for selecting items in the hierarchy tree.

- To reveal the next level of the hierarchy, click the  button.

- To select multiple items in the tree, press the **Ctrl** or **Shift** key while clicking items.
- Select user-defined items from the Items folders.

---

**NOTE**

When you connect to a cube, the “Default” item is selected in each hierarchy except Measures. This item represents your cube-defined default member, which displays in parentheses after the Default item in the tree.

---

### Selecting descendants

A member’s descendants include its children, grandchildren, and so on. In a hierarchy tree, you can right-click a member to select descendant sets.

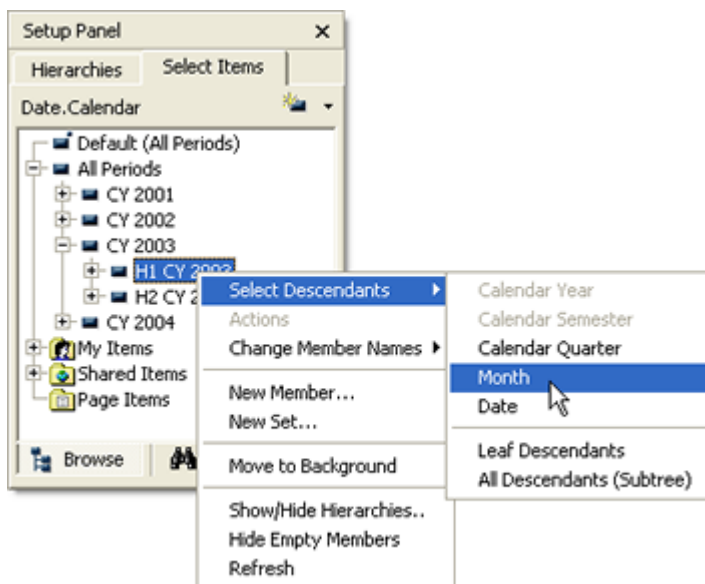


Figure 12. Selecting a descendants set

- Selecting a level selects the descendants of the member at that level. In Figure 12, the Month level is selected, which would return all the months under H1 CY 2003.
- Selecting **Leaf Descendants** selects all members at the bottom of each branch of the hierarchy.
- Selecting **All Descendants (Subtree)** selects all members that branch from the selected member.

## Arranging hierarchies in the Hierarchies tab

In the **Hierarchies** tab (Figure 10), you can drag hierarchies to the Rows, Columns, and Background boxes. Items selected in hierarchies on Rows and Columns display in the view. For example, items selected on Rows display as grid row headers.

### To change the layout

- In the **Hierarchies** tab, drag hierarchies to and from the Rows, Columns, and Background boxes.

## Applying changes to the query

After selecting items and arranging hierarchies, applying your changes updates the view with the new data. This is called “running the query.”

### To run a query

Click the toolbar **Apply** button.




---

### Tip

To run the query simply by moving your cursor over the view pane, select **View > Auto Apply**.

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## Slicing Background hierarchies

A Slicer provides drop-down menu access to selected members in a Background hierarchy. When you change the Slicer selection and click **Apply**, the values in the view update, showing you a different “slice” of data.

---

### Tip

Users often save views with Slicers in Briefing Books to emphasize the specific information they want readers to explore. See “Creating a Briefing Book” on page 49.

---

### To create a Slicer

- 1 In the **Hierarchies** tab, drag the hierarchy to the Background box.

- 2 Double-click the hierarchy to display its members in the **Select Items** tab.
- 3 Select the items that you want to include in the Slicer. If you select a set, the set members are listed individually in the Slicer.
- 4 Click **Apply**.

The Slicer appears just above the view as a drop-down menu (Figure 13) containing the selected members. You may select one member at a time.

You can have multiple Slicers in a view. Figure 13 shows two Slicers.

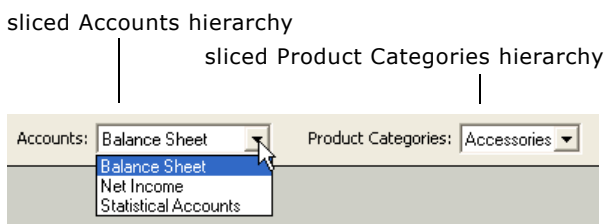


Figure 13. Two Slicers

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**Tip** To remove a Slicer, move the sliced hierarchy to Rows or Columns or select only one member in the sliced hierarchy.

---

## Showing a combined value

Instead of a Slicer, you can show a combined value—a mathematical formula based on the values of the selected items. Example formulas include the sum, average, or result of a comparison such as the highest member. The formula is defined by the cube designer and depends on the selected measure.



### To show a combined value

- Right-click a sliced hierarchy in the Background box, select **Combine Items**, and run the query.

---

**Tip** A button beside a Background hierarchy indicates if the hierarchy is sliced or is showing a combined value. To toggle

between the two states, click the button and run the query.

Sliced:  , Combined: 

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## Other Setup Panel features

The Setup Panel also offers the following features which are described in ProClarity Professional online help:

- Show or hide measures and hierarchies
- Hide empty members (in Rows, Columns, or Background)
- Search for members
- Change the names used for members

The next chapter describes how you can create custom items to use in your queries.





## Chapter 3: Creating Measures, Members, and Sets

You can create custom business logic—measures, members, and sets that meet your specific business needs. In the Setup Panel, each hierarchy contains three folders that store user-defined business logic:

- **My Items.** Items that are saved on your computer for your personal use.
- **Shared Items.** Items that are available to authorized ProClarity users.
- **Page Items.** Items that are available only for the query in which they were used.

You can use these items in a query or share them with other ProClarity users.

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### NOTE

Cube designers frequently create cube-defined business logic. These items appear on various levels in the hierarchy tree, but not in the Items folders.

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### In this chapter

- Creating measures
  - Creating members
  - Creating sets
  - Sharing items
- 
- 

## Creating measures

You can create measures that perform calculations on other items. For example, a Profit measure might subtract Store Cost from Store Sales.

### To create a measure

- 1 In the **Hierarchies** tab in the Setup Panel, double-click Measures.
- 2 In the **Select Items** tab, right-click a measure and select **New Measure**.
- 3 In the New Measure Wizard, select the type of measure you want to create:
  - **Growth**. Shows the change from the prior year or prior quarter based on a percent change or an absolute change.
  - **Time series**. Creates year-to-date, quarter-to-date, and period-to-date. You can specify a rolling period to combine selected periods.
  - **Simple relationship**. Creates ratio, difference, percent of difference, or percent of markup formulas.
  - **Custom formula**. Lets you write your own MDX expression.

In the **Select Items** tab, the new measure appears in the My Items folder under Measures.

## Creating members

In the Setup Panel, you create aggregate members by selecting items to sum.

### To create a member

- 1 In the **Hierarchies** tab in the Setup Panel, double-click a hierarchy.
- 2 In the **Select Items** tab, select the items that you want to sum.
- 3 Right-click a selected item and select **New Member**.
- 4 In the Create New Aggregate Member dialog box, type a name.
- 5 Click **OK**.

The new member appears in the My Items folder of its parent hierarchy.

**Tip**

---

For tips on selecting items, see “Selecting items in the Select Items tab” on page 19.

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## Creating sets

In the Setup Panel, you create sets by selecting items to include in the set.

### To create a set

- 1 In the **Hierarchies** tab in the Setup Panel, double-click the hierarchy.
- 2 In the **Select Items** tab, select the items that you want to include in the set.
- 3 Right-click a selected item and select **New Set**.
- 4 In the New Set dialog box, type a name.
- 5 Click **OK**.

The new set appears in the My Items folder of its parent hierarchy.

## Using other ProClarity tools to create items

- **MDX Editor.** Create or revise the underlying MDX expression of measures, members, and sets. To open the MDX Editor, select **View > MDX Editor**.
- **ProClarity KPI Designer.** (Optional add-in for ProClarity Professional) Create measures, members, and KPIs (key performance indicators) using a wizard-like interface. If you have KPI Designer installed, ProClarity Professional online help provides instructions for it.
- **ProClarity Selector.** (Optional add-in to ProClarity Professional) Create complex, dynamic sets using a variety of filter and sort options. If you have Selector installed, ProClarity Professional online help provides instructions for it.

## Sharing items

From the Setup Panel, you can copy items to ProClarity Analytics Server (Analytics Server) so they can be used by other ProClarity users.

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### NOTE

The instructions in this section assume that you are connect to Analytics Server and have appropriate rights. For more information about Analytics Server security, see ProClarity Professional online help.

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### To share an item

- 1 In the **Hierarchies** tab, double-click the hierarchy that contains the item you want to publish.
- 2 In the My Items or Page Items folder, right-click the item and select **Copy to**.
- 3 In the Location box, select a library.



To create a new library, click the **Create New Library** button.

- 4 Click **OK**.

The item becomes available from the Shared Items folder in the selected library.

### Copying items among folders

In addition to copying items to Analytics Server, you can copy Shared Items or Page Items to My Items. This makes items permanently available to you, even when you are not connected to Analytics Server.

### To copy items among folders

- 1 Right-click the item and select **Copy to**.
- 2 In the Copy To dialog box, select **My Items** or a library from the drop-down menu.
- 3 Click **OK**.

## Chapter 4: Exploring Data with Charts and Grids

The results of a query display as a view, such as a chart or grid. This chapter describes how to explore data in chart and grid views. For example, you can show more detail (drill down or expand) or show less detail (drill up or collapse).

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### In this chapter

- Displaying a chart or grid view
  - Drilling down
  - Drilling up
  - Using other navigation features
  - Pivoting hierarchies
  - Using actions
- 
- 

### Displaying a chart or grid view

Views can display in a full screen using a single view type or in a split screen containing a grid and another view type.

#### To display a chart

- In the **View** menu, select **Business Charts** and then select a chart type.

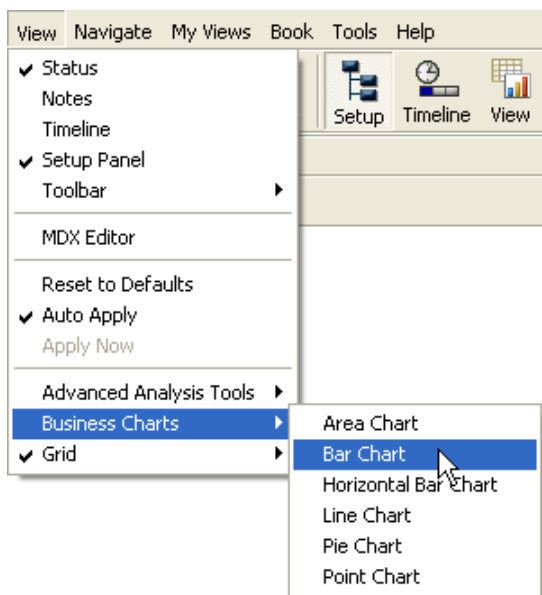


Figure 14. Choosing a chart type from the View menu

### To display a grid

- From the **View** menu, select **Grid** and then select how you want to display the grid. To display a grid in a split screen with another view type, select **Bottom** or **Right**.

### Tip

You can change the appearance of a chart or grid. For example, in a grid you can display subtotals, exception highlighting, or percent-of-total.

## Drilling down

Drilling down increases the amount of detail being displayed so you can compare lower-level members in a hierarchy.

For example, a view shows sales for all customers (Figure 15). To compare sales by country, drill down on All Customers. (Figure 16).

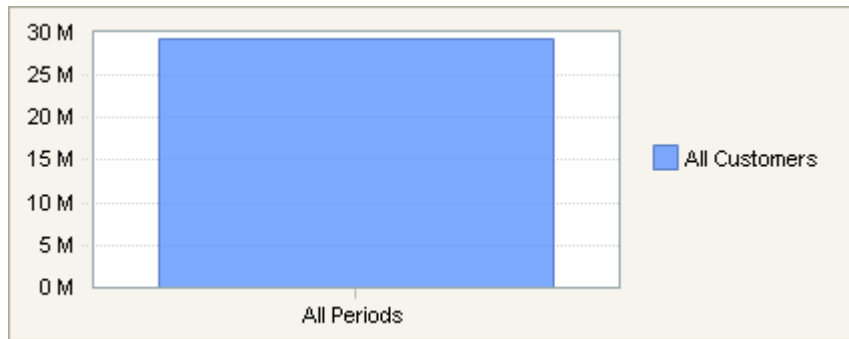


Figure 15. Before drilling down

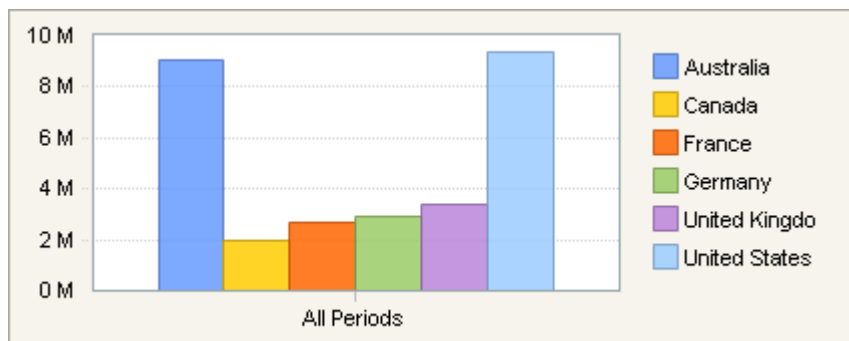


Figure 16. After drilling down on All Customers

### To drill down on a member

- 1 Click a member in a chart or grid. A small arrow appears beside the cursor when you pass over a member that can be drilled.
  - In a chart, the first member that is not already at its lowest level drills down.
  - In a grid, the member you click drills down.

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#### NOTE

Right-click a member and select **Drill Down** to see a list that includes Background hierarchies. If you select a Background hierarchy, the original member that you clicked is replaced by the Background hierarchy.

---

## Drilling up

Drilling up decreases the level of detail being displayed, so you can compare higher-level members of a hierarchy.

For example, suppose you have a view comparing sales for the last three months. To view data by quarter, drill up on any month. The following two figures (Figure 17 and Figure 18) illustrate this.

	October 2003	November 2003	December 2003
Accessories	54,595.17	54,832.02	65,607.99
Bikes	999,928.88	1,116,620.90	1,635,373.24
Clothing	25,925.53	25,528.19	30,806.54

Figure 17. View before drilling up

	Q3 CY 2003	Q4 CY 2003
Accessories	118,674.53	175,035.18
Bikes	2,569,678.24	3,751,923.02
Clothing	55,987.71	82,260.26

Figure 18. View after drilling up on any month

When you drill up, the members from the next highest level display.

### To drill up on a member

- Hold down the **Shift** key and click a member in a chart or grid. A small arrow appears beside the cursor when you pass over a member that can be drilled.

## Using other navigation features

Right-click a member in a grid or chart to access the following features:

- **Expand.** Adds a member's children to the query while leaving other members in their current state.
- **Collapse.** Removes the children of the expanded member while leaving other members in their current state.
- **Show Only.** Removes all other members that are from the same hierarchy the selected member.



- **Hide.** Removes the selected member.

## Pivoting hierarchies

When you pivot, hierarchies on Rows move to Columns, and hierarchies on Columns move to Rows. Pivoting the view emphasizes different relationships in the data (see “The data layout” on page 16).

### To pivot hierarchies

- Right-click the background of a chart or grid and select **Pivot**.

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#### NOTE

If you pivot a view that has sort, filter, or grid totals settings, the settings move to the other axis.

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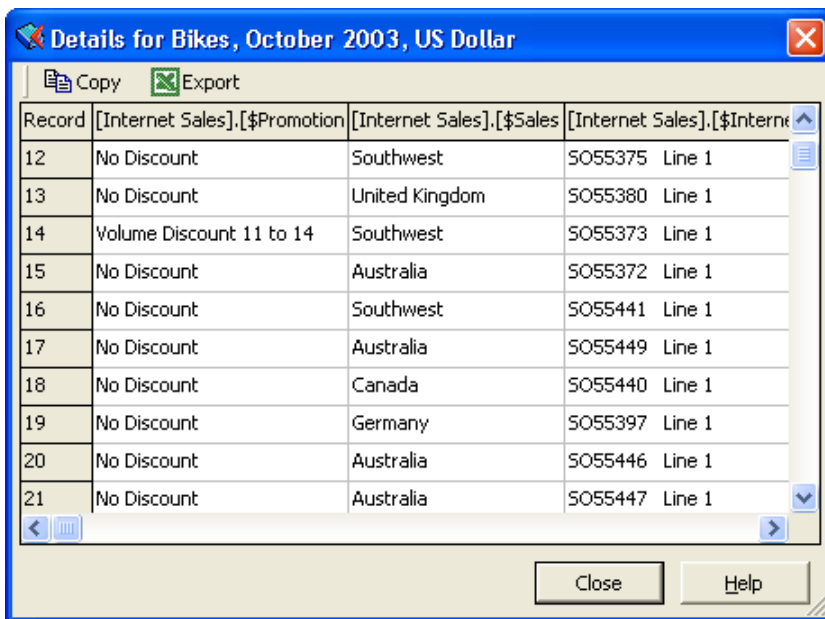
## Using actions

Actions are links to information. The links, maintained by the cube administrator, may be to Web pages, spreadsheets, special reports, or other documents. For example, Drillthrough actions display a list of records that provide additional information about a value (Figure 19).

### To access an action

- Right-click an item in a view or in the hierarchy tree, select **Actions**, and select a link.

If no actions are available for the item, the Actions command is not available.



The screenshot shows a window titled "Details for Bikes, October 2003, US Dollar". At the top, there are "Copy" and "Export" buttons. Below is a table with the following data:

Record	[Internet Sales].[\$Promotion	[Internet Sales].[\$Sales	[Internet Sales].[\$Interne
12	No Discount	Southwest	SO55375 Line 1
13	No Discount	United Kingdom	SO55380 Line 1
14	Volume Discount 11 to 14	Southwest	SO55373 Line 1
15	No Discount	Australia	SO55372 Line 1
16	No Discount	Southwest	SO55441 Line 1
17	No Discount	Australia	SO55449 Line 1
18	No Discount	Canada	SO55440 Line 1
19	No Discount	Germany	SO55397 Line 1
20	No Discount	Australia	SO55446 Line 1
21	No Discount	Australia	SO55447 Line 1

At the bottom of the window, there are "Close" and "Help" buttons.

Figure 19. Records from a Drillthrough action

## Chapter 5: Filtering and Sorting Data

While exploring data, you may prefer to work with a subset of the data. For example, you can apply a filter to show only products that contribute to the top 20% of revenue. And, you may want to sort the data, ordering it from largest to smallest.

---

---

### In this chapter

- Filtering data
  - Sorting data
- 
- 

## Filtering data

Filtering lets you focus on important data and makes your query results easier to read. Filtering is particularly advantageous with very large hierarchies because it reduces the amount of time required to run a query.

### To filter data

- 1 Right-click a grid or chart background and select **Filter**.  
The Filter dialog box appears (Figure 20).
- 2 To hide empty rows or columns from the query result, select one or both check boxes under **Empty Results**.
- 3 For Filter 1, select **Show rows** or **Hide rows**.
- 4 From the first drop-down menu, select the filtering type then type a count, percentage, or amount.
- 5 From the **Based on** boxes, select the column and measure on which to base the filter.
- 6 Click **OK**.

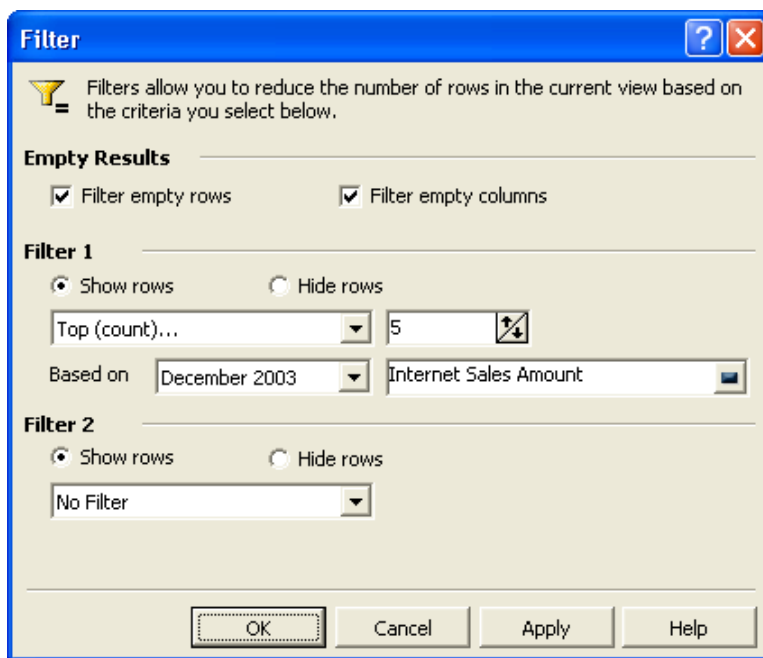


Figure 20. Filter dialog box

**NOTE**


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If you also define settings for Filter 2, Filter 2 settings apply to the results of Filter 1.

---

**To remove filters**

- Select **No Filter** for both Filter 1 and Filter 2.

**Understanding how to filter based on columns**

This section explains how filters are based on column data. Figure 21 shows sales of all bike models over the past six months.

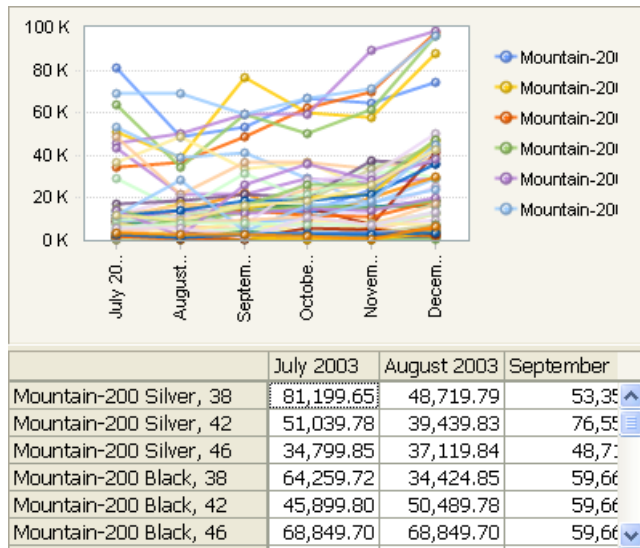


Figure 21. Query before filtering

Suppose you want to see only the five models with the highest gross profit, based on December sales. Figure 22 shows the filtered query results.

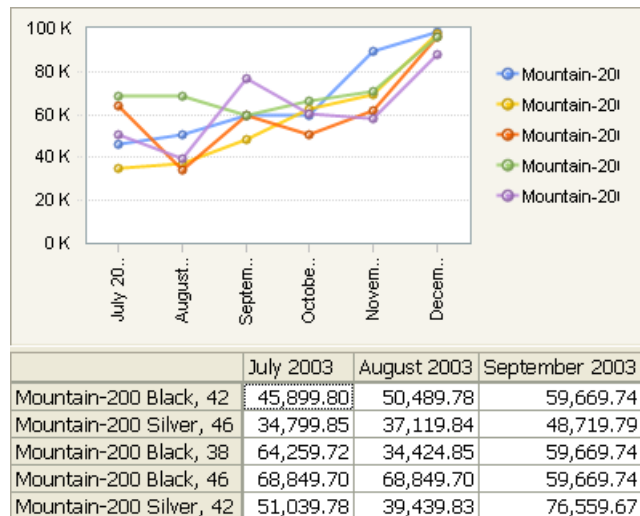


Figure 22. Filtered query results

Selecting a different column for the filter may return a different result. Just as filtering is based on a selected column, you also select a column when sorting data.

## Sorting data

Sorting displays the values of a selected column in ascending or descending order.

- 1 Right-click the background of a chart or grid and select **Sort**.

The Sort dialog box appears (Figure 23).

- 2 From the **Sort rows by** drop-down menu, select the column by which to sort the rows.
- 3 Select to sort in ascending or descending order.
- 4 To sort within groups contained in the Rows hierarchies, click **Preserve Peer Groupings**. For more information about peer groupings, see the next section, "Understanding peer groupings".
- 5 Click **OK**.

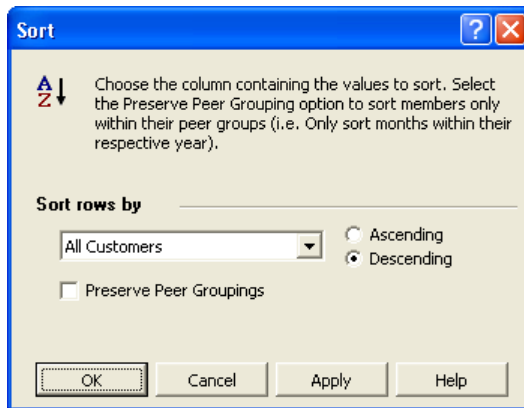


Figure 23. Sort dialog box

### To remove sorting

- Select **None** in the **Sort rows by** box.

## Understanding peer groupings

Sorting with **Preserve Peer Groupings** selected retains the groupings for hierarchies on Rows. Otherwise, all rows are sorted independently. For example, Figure 24 shows a view that contains items in the categories "Deli" and "Produce" sorted without preserving peer groupings.

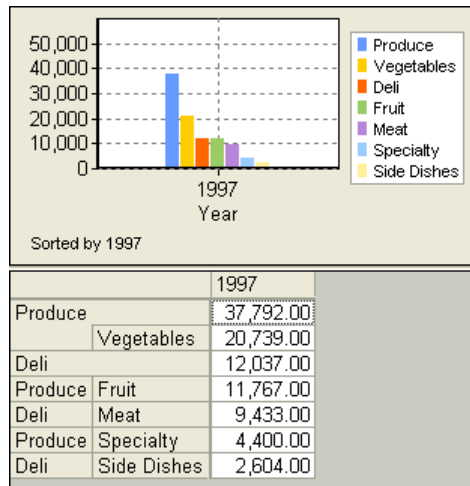


Figure 24. Result of sorting without Preserve Peer Groupings selected

If you preserve peer groupings, Deli and Produce are sorted first, and then the items within each group are sorted, as shown in Figure 25.

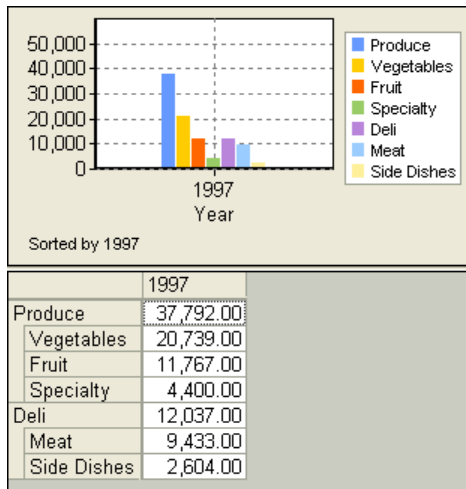


Figure 25. Result of sorting with Preserve Peer Groupings selected

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**NOTE**

If you filter or sort and then pivot the view, the filter or sort settings apply to the other axis. For example, they apply to Rows rather than Columns.

If you open the Sort or Filter dialog box after pivoting, the previous settings are not visible. To view or modify these settings, pivot again and then open the dialog box.

---



## Chapter 6: Exploring Data with Other View Types

ProClarity Professional offers other types of analytic views. This chapter describes how to use the Decomposition Tree, Performance Map, Perspective view, and Internet Explorer view.

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### In this chapter

- Finding root cause: Decomposition Tree
  - Using ratios of size and color to make comparisons: Performance Map
  - Analyzing large volumes of data: Perspective view
  - Displaying Web content: Internet Explorer view
- 
- 

### Finding root cause: Decomposition Tree

The Decomposition Tree breaks down a value to reveal its root cause. This information displays in a hierarchical tree, giving you an overview of how individual items contribute to the total.

Use a Decomposition Tree to answer questions such as:

- Which items are the biggest sellers?
- What percentage did Mountain Bikes contribute to Quarter 2 sales?

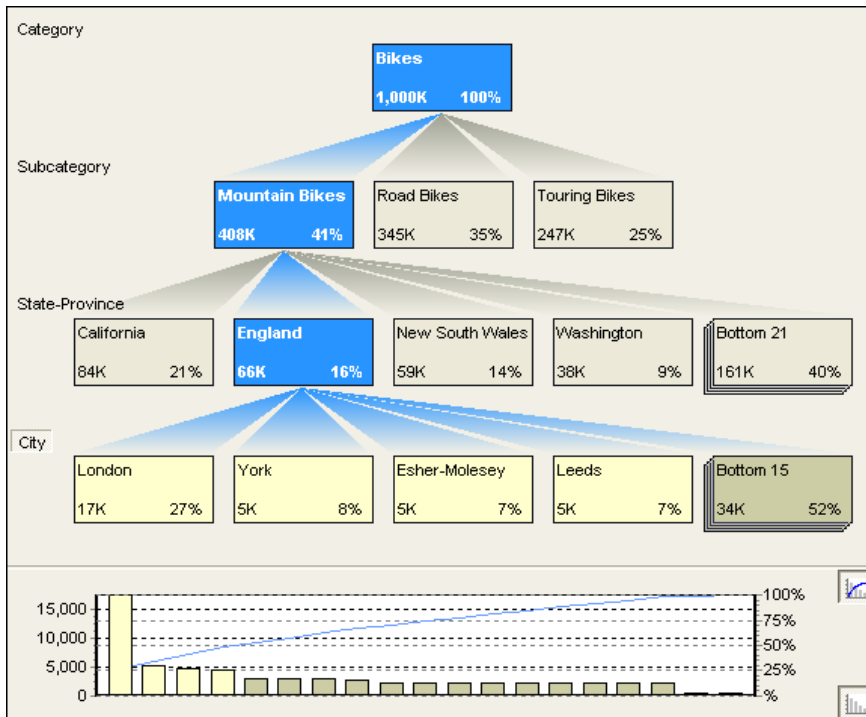


Figure 26. A Decomposition Tree

## Creating a Decomposition Tree

- Right-click a data point (such as a grid cell or chart bar) and select **Analyze in Decomposition Tree**.

The data point becomes the top node of a Decomposition Tree.

### NOTE

Because changes that you make in a Decomposition Tree do not show in the Setup Panel or in a grid view, we recommend closing the Setup Panel and viewing the Decomposition Tree in a full screen (with no grid).

## Working with a Decomposition Tree

You can use the following methods to explore data in a Decomposition Tree.

Task	Procedure
Break down a value by members of the same hierarchy.	Click a box (node).
Break down a value by members of a different hierarchy.	Right-click a node, select <b>Drill Down</b> and then select a level of a hierarchy.
Start a new tree that uses a particular node at the top of the tree.	Right-click the node and select <b>Start new tree</b> .
Show members contained in the Top or Bottom nodes, which summarize the values of members that do not have room to display.	Click the <b>Top</b> or <b>Bottom</b> node.
Change the measure being analyzed.	Right-click in the view and select <b>Change Measure</b> .

You can change many properties of a Decomposition Tree, such as numeric formatting and node size. Right-click the background of a Decomposition Tree and select **Decomposition Tree Properties**.

## Using ratios of size and color to make comparisons: Performance Map

A Performance Map shows selected members as boxes. Each box uses size and color to display the relative magnitude of two measures. Box size represents the first measure and box color represents the second measure.

Use a Performance Map to evaluate performance, discover opportunity gaps, and identify exceptions.

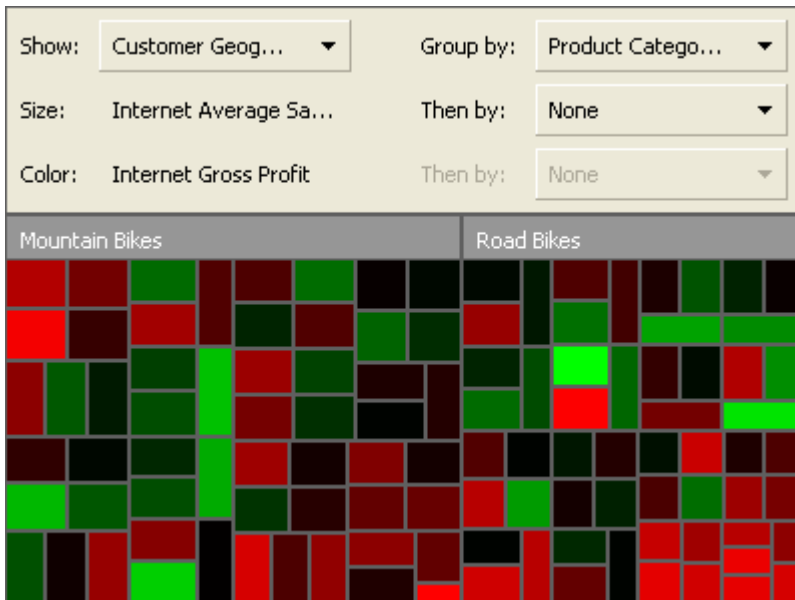


Figure 27. A Performance Map.

## Creating a Performance Map

- 1 In the **Hierarchies** tab of the Setup Panel, drag at least one hierarchy to the Rows box.
- 2 Drag Measures to the Columns box. (You can use any hierarchy on Columns, but typically you will use Measures.)
- 3 Double-click Measures to display available measures in the **Select Items** tab.
- 4 Select the measures to use for size and color. Hold down the **Ctrl** key and first click the measure that you want to use for size, and then click the measure that you want to use for color.
- 5 Click the toolbar **Apply** button.
- 6 From the **View** menu, select **Advanced Analysis Tools > Performance Map**.

## Working with a Performance Map

You can use the following methods to explore data in a Performance Map.

Task	Procedure
Display information about a member.	Point to a box.
Drill down on a member.	Double-click a box or header.
Drill up on a member.	Right-click a box or header and select <b>Drill Up</b> .
Change the measures used as the size and color values.	In the <b>Select Items</b> tab in the Setup Panel, hold down the <b>Ctrl</b> key and click the measure to use as box size and the measure to use as box color. Then, click the toolbar <b>Apply</b> button.
Group boxes by a category.	In the setup pane, click the <b>Group by</b> drop-down menu and select a level of a hierarchy. Boxes will be grouped by the members of that level.

---

### Tip

Change the color range in a Performance Map to normalize data to reflect your average range of highs and lows.

To change the color range, right-click a Performance Map and select **Performance Map Properties**.

---

## Analyzing large volumes of data: Perspective view

Use a Perspective view to display relationships in large volumes of data and to detect exceptional performers. This view can help you answer questions such as:

- Who are my most profitable customers?
- How did forecasted revenue compare with actual revenue?

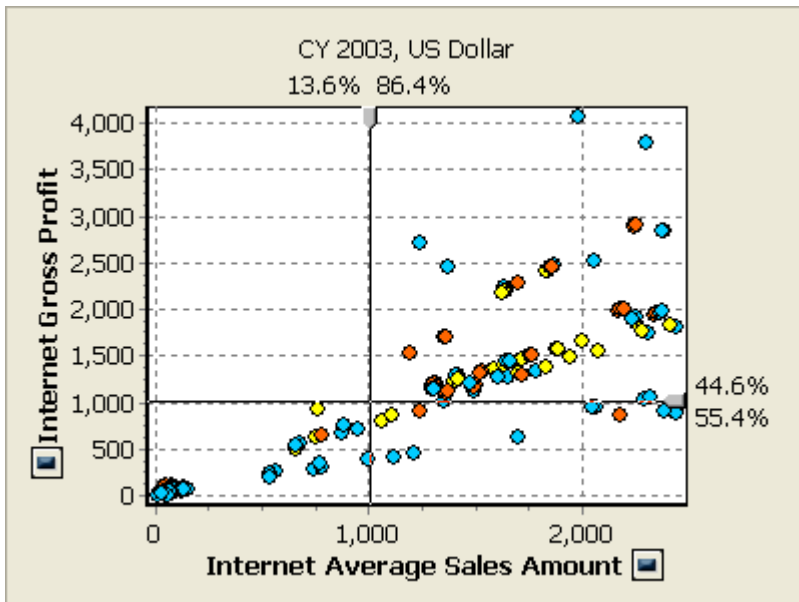



Figure 28. A Perspective view

## Creating a Perspective view

- 1 From the **View** menu, select **Advanced Analysis Tools > Perspective**.  
The Perspective Wizard appears. Click **Next** in the Welcome screen to proceed to the Step 1 screen.
- 2 To change the query, select a hierarchy and click **Change Selection**. Make your selection in the Change Selections dialog box.
- 3 Click **Next**.
- 4 Select measures for the y-axis and x-axis. For example, you may want to see the relationship between profit and revenue.
- 5 Click **Finish** to display the data in a Perspective view.

## Working with a Perspective view

You can use the following methods to explore data in a Perspective view.

Task	Procedure
Display popup information about a member.	Point to the datapoint.
Change the slider bar's numeric format.	Right-click in the view, select <b>Statistical Sliders, Horizontal</b> or <b>Vertical</b> , and then select <b>Sum, %Sum, Count, or %Count</b> .
Change the measures displayed on an axis.	Click the  button beside a measure label and select a measure.
Show only selected data points (remove all others from the view).	Drag down and to the right, surrounding the points you want to keep. Release the mouse button and select <b>Show Only</b> .

You can change many properties of a Perspective view, such as changing the color and shape of hierarchy members. Right-click the background of the view and select **Perspective Properties**.

## Displaying Web content: Internet Explorer view

You can display live content from a Web site. For example, you can display and explore the contents of a Microsoft® SQL Server® Reporting Services report.

### To create an Internet Explorer view

- From the **View** menu, select **Advanced Analysis Tools > Internet Explorer** and type the URL for the Web page you want to display.





## Chapter 7: Saving and Sharing Your Views

You can save views as pages in a Briefing Book or as personal views called "My Views." Briefing Books can be shared with other ProClarity users.

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### In this chapter

- Creating a Briefing Book
  - Saving a Briefing Book
  - Saving personal views
  - Other Briefing Book features
- 
- 

## Creating a Briefing Book

A Briefing Book contains at least one saved view, which is called a page. Before you can create a view, you must be connected to a cube. (From the File menu, select Open Cube.)

### To create a Briefing Book

- 1 From the **File** menu, select **New Book**.  
An empty, untitled book becomes the current book.
- 2 Create a view that you want to save.
- 3 From the **Book** menu, select **Add to Briefing Book**.
- 4 In the Add to Briefing Book dialog box (Figure 29), type a name for the page.

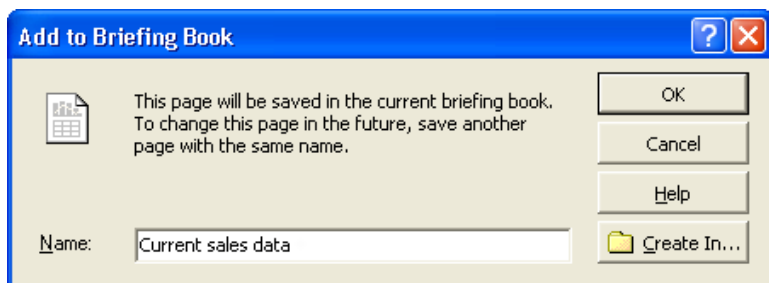


Figure 29. Add to Briefing Book dialog box

- 5 Click **OK**.
- 6 Repeat steps 2 through 6 for each page you want to add.

## Saving a Briefing Book

You can save a book locally or publish it to Analytics Server.

### Saving a Briefing Book locally or on the network

- 1 From the **File** menu, select **Save Book As**.
- 2 In the Save Briefing Book dialog box, specify where to save the Briefing Book.
- 3 Click **Save**.

### Publishing a Briefing Book to Analytics Server

Analytics Server provides a centralized location for storing Briefing Books. You must have appropriate access rights to publish a book to Analytics Server. Then, authorized users can view and edit the book.

---

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#### NOTE

The instructions in this section assume that you have publishing and Author rights to Analytics Server items.

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- 1 From the **File** menu, select **Analytics Server > Publish Book**.  
You may be prompted to log on to Analytics Server. To type your name and password, click **Security** in the Log in dialog box.
- 2 In the Publish Book dialog box, select the library to which you want to publish.  
To create a new library, click **New Library**.
- 3 In the **Name** and **Description** boxes, type the appropriate information.
- 4 Click **OK**.

## Saving personal views

You can save views for your personal use. These views are called "My Views." They are easy to access and provide a convenient starting point for further analysis.

### To save the current view in My Views

- 1 From the **My Views** menu, select **Add to My Views**.
- 2 In the Add to My Views dialog box (Figure 30), type a name and click **OK**.

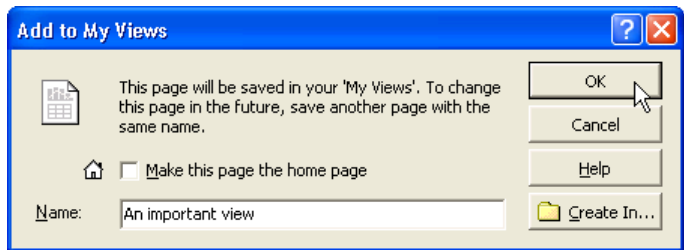


Figure 30. Add to My Views dialog box

### To access My Views

- 1 From the **My Views** menu, select **Show My Views**.
- 2 In ProClarity Professional, select a view from the list of pages that appears in the left pane .

## Other Briefing Book features

You can display ProClarity information in Microsoft Office applications. Access the following features from the **File** menu:

- **Print.** Print the current view or the entire Briefing Book.
- **Export to Excel.** Copies ProClarity data to an Excel report.
- **Export to Outlook.** Sends a Briefing Book via Outlook. The book can provide analysis capabilities for other ProClarity Professional users.

- **Export to PowerPoint.** Adds ProClarity views to a PowerPoint presentation. The presentation does not provide analysis tools to the user.

## Appendix: Installing Your Application

You can install ProClarity Professional using one of the following methods:

- Install Web Professional from the Analytics Server Web site
- Install Desktop Professional from the product CD

### Software

ProClarity Professional supports the following Microsoft® operating systems:

- Windows® 2000 product family, with Service Pack 4
- Windows XP, with Service Pack 2
- Windows 2003 product family
- Windows Vista™ (excluding Starter)

The Export to Outlook®, Export to Excel, and Export to PowerPoint® features support the following versions of Microsoft Office:

- Office XP
- Office 2003
- Office 2007

### Browser (Web Professional and Web Standard)

- Internet Explorer 6.0
- Internet Explorer 7.0

#### Internet Explorer Enhanced Security

In order to use ProClarity features that require an internet connection, Internet Explorer users may be required to add Analytics Server or remote OLAP servers to the Local Intranet zone.

#### To add sites to the Local Intranet zone

- 1 In Internet Explorer, select **Tools > Internet Options**.
- 2 In the Security tab, click the Local Intranet icon and then click **Sites**.

- 3 In the Local Intranet screen, click **Advanced**. (Some systems may not require this step.)
- 4 To add Analytics Server, type the URL of Analytics Server.
- 5 Click **Add**.

## User privileges

To install Web or Desktop Professional, you must be logged on to your computer as a user with local administrator privileges.

## Installing Web Professional

The following instructions describe how to download Web Professional. The procedure for downloading any component from Analytics Server is similar.

### To install Web Professional

- 1 Open your Web browser and type the URL for Analytics Server.
- 2 In the left pane of the Analytics Server Contents page, click **Check for Downloads**.  
One of the following occurs:
  - The Download Components page appears (Figure 31). Skip to step 6.Or
  - A message appears stating that you need to install ProClarity Download Manager. Typically, this is required the first time you download a component. Proceed with step 3.
- 3 Click **Install Download Manager**.
- 4 If a dialog box prompts you to run the file, click **Run**. Depending on your security configuration, other dialog boxes may appear.  
The ProClarity Download Manager - InstallShield Wizard screen appears.
- 5 Click **Next**. If prompted to overwrite an existing Download Manager file, select **Yes**.

When the Download Manager installation is finished, the Download Components page appears (Figure 31).

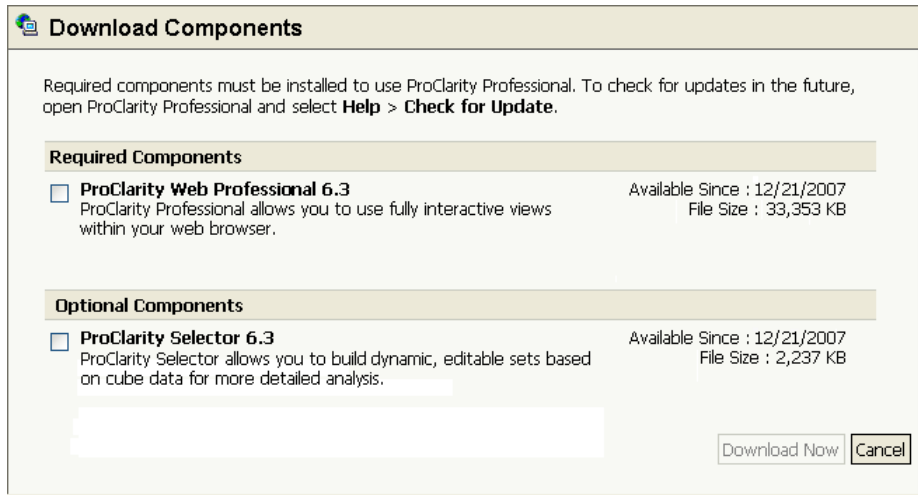


Figure 31. Analytics Server download page

- 6 Select **ProClarity Web Professional 6.3** and click **Download Now**.
- 7 In the File Download dialog box, click **Run**. If another dialog box appears prompting you to run the software, click **Run**.  
The ProClarity Web Professional 6.3 Setup screen appears.
- 8 Click **Next**.
- 9 To accept the Software License Terms, select the **I accept ...** option and click **Next**.
- 10 Click **Finish** in the InstallShield Wizard Completed screen.
- 11 Close the Download Components page.

You can now open a Briefing Book using Web Professional. On the Analytics Server Contents page, select **ProClarity Professional**, and then click a library, a book, and a page.

---

**Tip** If the Professional application type is not available, you can use ProClarity Web Standard to analyze data.

---

## Installing Desktop Professional

The Desktop Professional installation program guides you through a series of InstallShield Wizard screens.

- 1 Before installing Desktop Professional, close all open applications.
- 2 Insert the ProClarity Analytics Platform 6 Client product CD into the CD-ROM drive.
- 3 Click **Install Desktop Professional**.  
Before you can install Desktop Professional, you may be required to install components and restart your computer.
- 4 In the Welcome screen, click **Next**.
- 5 To accept the Software License Terms, select the **I accept ...** option and click **Next**.
- 6 In the Customer Information screen, select an option and click **Next**.

The Custom Setup screen appears, as shown in Figure 32.



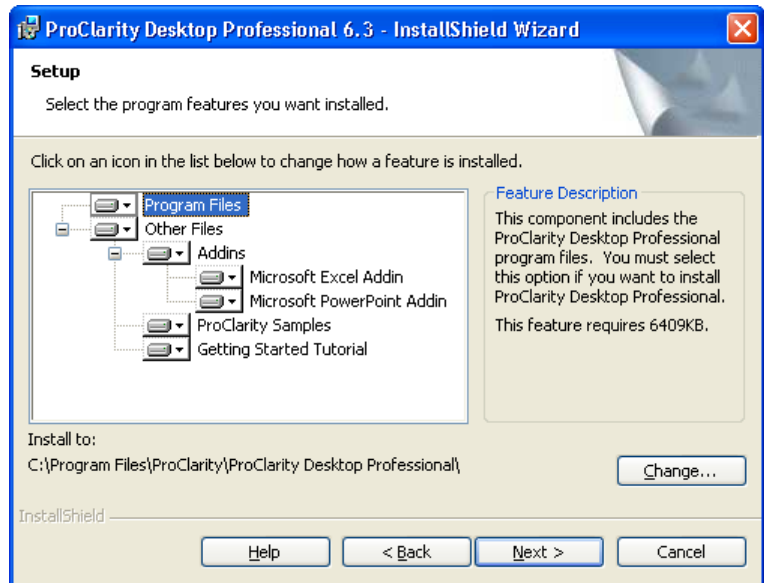


Figure 32. The Custom Setup screen

- 7 To accept the default installation options, click **Next** on the Custom Setup screen.

Or

To select or clear specific components, click the box next to the component and select an option from the drop-down menu. To install the files to a different location, click **Change**.

---

**Tip** The Feature Description screen briefly describes the selected component and displays the amount of disk space that the corresponding files require.

---

- 8 After choosing the setup options, click **Next**.
- 9 In the Ready to Install the Program screen, review the installation settings and then click **Install** to continue.
- 10 Click **Finish** in the InstallShield Wizard Completed screen.

The initial installation screen reappears, displaying the following buttons:

- **Release Notes.** Opens the release notes for ProClarity Professional.
- **Product Information.** Provides links to online documents or Web sites.

# Glossary

<b>Access rights</b>	The type of access (Reader, Author, Administrator) that roles have to ProClarity Analytics Server (PAS) and PAS items.
<b>Actions</b>	Operations (for example, links) that can launch an application with a selected item as a parameter or retrieve information about the selected item. Actions are enabled by cube administrators. (See "Using actions" on page 33.)
<b>Ad hoc queries</b>	Questions about specific data relationships that are not asked regularly enough to build a standard report to answer.
<b>Analytics Server</b>	See ProClarity Analytics Server.
<b>Background</b>	The location for hierarchies that are not displayed in the view. (Hierarchies that are included in the view display on Rows or Columns.) Items from Background hierarchies act as filters for the Row and Column data. As you change Background selections, Row and Column comparisons are based on different data subsets as defined by the Background selections. (See "Selecting items in the Background" on page 15.)
<b>Briefing Books</b>	A view or collection of views that are created and saved using ProClarity Professional. (See "Creating a Briefing Book" on page 49.)
<b>Child</b>	A member in the next lower level in a hierarchy that is directly related to the current member. For example, in a Time hierarchy containing the levels Quarter, Month, and Day, January is a child of Qtr1.
<b>Collapse</b>	An analysis tool, similar to drill up, that displays less detail about an item while maintaining the current display of other items. (See "Using other navigation features" on page 32.)
<b>Columns</b>	A location for hierarchies displayed by the view. In chart views, hierarchies placed on Columns make up the bottom or top axis (X-axis) of the chart. See also Row.

<b>Cube</b>	A set of data that is organized and summarized into a multidimensional structure defined by a set of dimensions and measures. (descriptive data such as Type of Product and Store Location).
<b>Datapoint</b>	A point that represents the value of a single item displayed in the view.
<b>Decomposition Tree</b>	A view that breaks a measure apart to show the raw and percentage data that make up each of its components. The results appear in a hierarchical tree. A corresponding Pareto chart provides an overview of the performance of members in the view. (See "Finding root cause: Decomposition Tree" on page 41.)
<b>Descendant</b>	A member in a dimension hierarchy that is related to a member of a higher level within the same dimension. For example, in a Time dimension containing the levels Year, Quarter, Month, and Day, January is a descendant of 1997. (See "Selecting descendants" on page 20.)
<b>Dimension</b>	A structural attribute of a cube, which is an organized hierarchy of categories (levels) that describe data in the fact table. These categories typically describe a similar set of members upon which the user wants to base an analysis. For example, a geography dimension might include levels for Country, Region, State or Province, and City.
<b>Drill down/ drill up</b>	A technique for navigating through levels of data ranging from the most summarized (up) to the most detailed (down). For example, when viewing the details of sales data by year, a user can drill down to display sales data by quarter, and further to display data by month. (See "Drilling down" on page 30.)
<b>Exception highlighting</b>	A feature used in a grid to highlight numbers that meet specified conditions.
<b>Expand</b>	An analysis feature, similar to drill down, that displays more detail about an item while maintaining the current display of other items. (See "Using other navigation features" on page 32.)
<b>Hide</b>	An analysis feature that removes selected items from the current display of data. (See "Using other navigation features" on page 32.)

<b>Hierarchy</b>	A logical tree structure that organizes the members of a dimension such that each member has one parent member and zero or more child members.
<b>KPI</b>	Key Performance Indicator. A predefined measure used to track performance of a strategic goal, objective, plan, initiative, or business process. A KPI is evaluated against a target.
<b>Level</b>	The name of a set of members in a dimension hierarchy such that all members of the set are at the same distance from the root of the hierarchy. For example, a time hierarchy may contain the levels Year, Month, and Day. (See "About cube data" on page 13.)
<b>MDX (multi-dimensional expression)</b>	A syntax used for defining multidimensional objects and querying and manipulating multidimensional data.
<b>Measure</b>	In a cube, a set of values that are usually numeric and are based on a column in the fact table of the cube. Measures are the central values that are aggregated and analyzed. Some examples of measures are Sales Dollars, Number of Product Failures, Gross Margin, and Average Inventory Levels. (See "You can create measures that perform calculations on other items. For example, a Profit measure might subtract Store Cost from Store Sales." on page 25.)
<b>Member</b>	An item in a dimension representing one or more occurrences of data. A member can be either unique or nonunique. For example, 1997 and 1998 represent unique members in the year level of a time dimension, whereas January represents nonunique members in the month level because there can be more than one January in the time dimension if it contains data for more than one year. (See "About cube data" on page 13.)
<b>Multi-dimensional analysis</b>	A methodology often used to design OLAP systems that involves describing numeric facts (such as revenue) by business descriptors (such as customers, time, products, and so on).
<b>My Items</b>	User-defined sets, members, or measures created in ProClarity Professional and stored in the My Items folder in the Setup Panel.(See "My Items. Items that are saved on your computer for your personal use." on page 25.)

<b>My Views</b>	A special Briefing Book used to save views for personal use. (See "Saving personal views" on page 51.)
<b>OLE DB for OLAP Provider</b>	OLAP server software that enables querying of data contained in remote instances of SQL Server. Analytics Server uses Microsoft OLE DB Provider for SQL Server to provide an interface to the Analytics Server database.
<b>Online Analytical Processing (OLAP)</b>	A class of technologies that are designed for live, ad-hoc data access and analysis. OLAP data is stored in a multidimensional database, which considers each data attribute (such as product, geographic sales region, and time period) as a separate dimension. OLAP data is grouped and organized, by shared dimensions, in cubes. The Data Warehouse uses OLAP cubes to store imported data, which accelerates report and query processing.
<b>Page Items</b>	Temporary sets that are created by opening a Briefing Book in which they are used or by returning to a historical view in which they are used.
<b>Performance Map</b>	A view type that shows selected members as boxes. Each box displays the relative magnitude of two measures, which are represented by box size and box color. (See "Using ratios of size and color to make comparisons: Performance Map" on page 43)
<b>Perspective</b>	A view type (similar to a scatter chart) that enables comparison between two measures for a set of members with the display of a very large number of data points. (See "Analyzing large volumes of data: Perspective view" on page 45.)
<b>Pivot</b>	A feature that flips data from Rows to Columns and vice versa to emphasize different comparisons. (See "Pivoting hierarchies" on page 33.)
<b>ProClarity Analytics Server</b>	A server that provides connection to OLAP data and controlled Web access to published items such as Briefing Books, KPI templates, files, members, and sets.
<b>ProClarity Dashboard Server</b>	An application that displays information from multiple data sources in a Web browser. ProClarity Dashboard allows you to monitor business activities, discover trends and exceptions in your data, and find root causes.

<b>ProClarity KPI Designer</b>	An add-in for ProClarity Professional. This application helps users design Key Performance Indicators—new members and measures that enable analysts and business managers to determine whether key business objectives are being met.
<b>ProClarity Desktop Professional</b>	The ProClarity data analysis application that runs in a desktop computer as an independent application, not in a Web browser.
<b>ProClarity Professional</b>	A term that encompasses both ProClarity Desktop Professional and ProClarity Web Professional.
<b>ProClarity Selector</b>	An optional add-in to ProClarity Professional that simplifies the process of creating custom, complex sets such as dynamic sets that change as cube data changes.
<b>ProClarity Web Professional</b>	The ProClarity data analysis application that is typically downloaded from Analytics Server and runs in a Web browser. Web Professional has the look and feel of Desktop Professional.
<b>ProClarity Web Standard</b>	The Web version of the ProClarity analysis software that does not require users to install any files. Web Standard users access Briefing Books and analysis features through a Web browser.
<b>Query</b>	A formalized instruction to a database to either return a set of records or perform a specified action on a set of records as specified in the query. (See “Applying changes to the query” on page 21.)
<b>Role</b>	A group of users assigned to a specified set of data permissions. Users are associated with roles to gain permission to perform specific tasks and receive access to specific items.
<b>Row</b>	The horizontal arrangement of cells in a table or spreadsheet. In chart views, hierarchies placed on rows are represented by the left or right axis (or Y-axis) of the chart and display in the legend.
<b>Series</b>	Data represented by the bars, areas, pie slices, lines, or points of a chart and by the individual entries on the Rows legend. Each series represents a row of data.

<b>Set</b>	A group of members or a set expression that is named and created for reuse. For example, to quickly display the top five cities in a sales report, the user could create a set called Top Five Cities. (See "Creating sets" on page 27.)
<b>Setup Panel</b>	A tool used to arrange hierarchies and select or search for members. (See Chapter 2, "Creating Queries" on page 13.)
<b>Shared Items</b>	User-defined business logic (sets, members, measures, and KPIs) created in ProClarity Professional, Selector, or KPI Designer and then saved to Analytics Server to be shared with other users. Stored in the Shared Items folder in the Setup Panel. (See "Sharing items" on page 28.)
<b>Show Only</b>	An analysis feature that removes all but selected items from the current display of data. (See "Using other navigation features" on page 32.)
<b>Slicer</b>	A drop-down menu that displays with a Briefing Book page and contains members (or slices of data) users can select to filter the data in the page. (See "Slicing Background hierarchies" on page 21.)
<b>User-defined members and measures</b>	Members and measures that can be defined by end users. Each one performs a calculation (such as a sum) on selected members. (See "Creating measures" on page 25.)
<b>View type</b>	A particular graphical presentation of query results. Examples include charts, grids, and Decomposition Trees.



# Index

- A**
- about the Getting Started Guide 5
  - accessing
    - actions 33
    - Getting Started Tutorial 6
    - My Views 51
    - ProClarity Professional online help 5
  - Actions
    - accessing 33
    - defined 59
  - adding
    - pages to Briefing Books 49
    - views to My Views 51
  - analysis terms 13
  - Analytics Server
    - See ProClarity Analytics Server
  - apply changes (run a query) 21
  - arranging
    - hierarchies and measures 21
  - automatically apply changes 21
  - availability of features 5
  - axes, configuring for a Perspective view 47
- B**
- Background
    - and slicers 21
    - selecting items 15, 21, 22
    - understanding 15
  - break down
    - See Decomposition Tree
    - See drill down
  - Briefing Books
    - adding pages 49
    - creating 49
    - defined 59
    - naming and saving 50
    - opening
      - local 11
      - published (retrieving) 9, 11
    - publishing to Analytics Server 50
    - retrieving from Analytics Server 11
- C**
- categories
    - See hierarchies
    - See Setup Panel

- charts
  - displaying 29
  - filtering data 35
  - selecting types 29
  - sorting data 38
- collapsing
  - data in a chart or grid (Collapse feature) 32
  - defined 59
- Columns 21
- combined value
  - show 22
- connecting
  - to a cube 9, 10
  - to Analytics Server 7
- Contents screen for Analytics Server 7
- copying
  - Page Items to My Items 28
  - Shared Items to My Items 28
- create
  - members 26
- cubes
  - connecting to 9, 10
  - defined 60
- Custom Setup for installing Desktop Professional 57

## D

- Decomposition Tree
  - defined 60
  - purpose 41
  - working with 43
- descendants
  - defined 60
- Desktop Professional
  - defined 63
  - starting 8
- details of the ProClarity Professional screen 12
- dimensions
  - defined 60
- downloads from Analytics Server 54
- drilling down
  - defined 60
  - on a chart or grid 31
  - purpose 30
- drilling up
  - defined 60
  - purpose 32

- E**
  - eliminating
    - data in a chart or grid (Hide feature) 33
  - execute
    - See apply changes
  - expanding
    - data in a chart or grid (Expand feature) 32
    - defined 60
- F**
  - feature availability 5
  - filtering
    - and pivoting a view 40
    - empty rows or columns 35
    - rows based on columns, explained 36
    - turning off 36
    - turning on 35
- G**
  - Getting Started Guide, about 5
  - graph
    - See chart
    - See Decomposition Tree
    - See grid
    - See Performance Map
    - See Perspective
  - grids
    - displaying 30
    - filtering data 35
    - sorting data 38
- H**
  - help
    - accessing 5
  - hide
    - defined 60
    - empty rows or columns 35
    - specified items from a view 33
  - hierarchies
    - arranging selected items 21
    - defined 61
    - explained 13, 14
    - pivoting rows/columns 33
    - selecting items from 17, 46
- I**
  - installing
    - Desktop Professional
      - custom setup 57
    - Web Professional 54

isolating  
data in a chart or grid (Show Only feature) 32

**K**  
keep only specified items in a view (Show Only) 32  
KPI Designer  
See ProClarity KPI Designer

**L**  
layout pane 21  
level, defined 61  
library, creating 28, 50  
links  
to Actions 33

**M**  
MDX, defined 61  
measures  
arranging 21  
creating 25  
defined 61  
explained 13  
publishing 28  
selecting 46, 47  
types in the New Measure Wizard 26  
members  
arranging 21  
changing names 23  
create 26  
creating 25  
defined 61  
explained 13  
publishing 28  
selecting 46  
multidimensional analysis  
defined 61  
My Items  
defined 61  
explained 25  
members placed into 26  
publishing 28  
sets 27  
My Views  
defined 62  
saving 51  
show My Views 51

- N**
  - navigation features 32
  - new measures
    - creating 25
    - types available from the New Measure Wizard 26
  - new members
    - creating 25
  
- O**
  - OLAP
    - defined 62
    - servers
      - connecting 10
  - OLE DB Provider for OLAP Services 62
  - opening
    - actions 33
    - cubes 9, 10
    - Getting Started Tutorial 6
    - My Views 51
    - ProClarity Professional online help 5
    - published Briefing Books (retrieving) 11
  
- P**
  - Page Items
    - copying to My Items 28
    - defined 62
    - explained 25
    - publishing 28
  - Pareto chart
    - See also* Decomposition Tree
  - peer groupings
    - explained 39
    - preserving when sorting 38, 39
  - Performance Map
    - about 43
    - working with 45
  - Perspective view
    - creating 46
    - defined 62
    - example information 46
    - purpose 45
    - working with 47
  - pivoting
    - affect on sorting or filtering 40
    - defined 62
    - hierarchies 33
  - ProClarity Analytics Server
    - connecting to 7

- Contents screen 7
- publishing Briefing Books to 50
- purpose 50
- retrieving Briefing Books from 11
- ProClarity Desktop Professional
  - customizing the installation 57
  - starting 8
  - system requirements 53
- ProClarity KPI Designer
- ProClarity product support 6
- ProClarity Professional
  - screen details 12
  - system requirements 53
- ProClarity Web Professional
  - installing (downloading) 54
  - screen details 12
  - starting 7
  - system requirements 53
- product support 6
- publishing
  - Briefing Books 50
  - items to Analytics Server 28
  - measures, members, and sets 28

## Q

- queries
  - automatically run 21
  - defined 63

## R

- refresh views
  - See apply changes
- relevant data
  - arranging to affect comparisons 14
- remove
  - a combined value for Background selections 22
  - all but selected items from a view (Show Only) 32
  - filters 36
  - selected items from a view (Hide) 33
  - slicers 22
  - sorting 38
- retrieving
  - a published Briefing Book 11
- roles
  - defined 63
- Rows 21, 33

**S**

- run queries 21
- saving views
  - in My Views 51
  - See *also* publishing
- screen details 12
- selecting
  - Background items 15, 21, 22
- series
  - defined 63
- servers
  - Analytics Server
  - connect to OLAP 10
- sets
  - creating 27
    - using the Setup Panel 27
  - defined 64
  - publishing 28
  - See *also* Page Items
- Setup Panel 18
  - arranging the layout 21
  - creating new members 26
  - creating sets 27
  - defined 64
  - displaying 17, 21
  - Find feature (Search tab) 23
  - layout pane 21
- Shared Items
  - copying to My Items 28
  - defined 64
  - explained 25
  - measures, members, or sets placed into 25, 28
- sharing
  - user-defined members, measures, or sets 28
  - See *also* publishing
- show a combined value 22
- Show Only
  - defined 64
  - specified data in a view 32
- Slicers
  - creating 21
  - defined 64
  - explained 21–??
  - removing 22
- sorting

- and pivoting a view 40
- and using peer groupings
  - explained 39
  - purpose 38
  - turning off 38
- split screen view 30
- spreadsheet
  - See grid
- starting
  - ProClarity Desktop Professional 8
- subcategories
  - See members
- support 6
- system requirements 53

**T** technical support 6

**U** user-defined measures

- creating 25
- publishing 28
- types available from the New Measure Wizard 26

user-defined members

- creating 25
- publishing 28

**V** view types

- chart 29
- Decomposition Tree 41
- grid 30
- Internet Explorer view 47
- Performance Map 43
- Perspective view

**W** Web Professional

- defined 63
- installing (downloading) 54

Welcome screen options for Desktop Professional 9  
wizard, Perspective 46



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- ProClarity connaissait l'éventualité d'un tel dommage.

Certains États n'autorisent pas l'exclusion ou la limitation de responsabilité pour les dommages indirects ou accessoires, de sorte que la limitation ou l'exclusion ci-dessus peut ne pas vous être applicable. Elles peuvent également ne pas vous être applicables, car votre pays n'autorise pas l'exclusion ou la limitation de responsabilité pour les dommages indirects, accessoires ou de quelque nature que ce soit.

**EFFET JURIDIQUE.** Le présent contrat décrit certains droits juridiques. Vous pourriez avoir d'autres droits prévus par les lois de votre État ou pays. Vous pourriez également avoir des droits à l'égard de la partie de qui vous avez acquis de logiciel. Le présent contrat ne modifie pas les droits que vous confèrent les lois de votre État ou pays si celles-ci ne le permettent pas.