

# Index

## • A •

- Access For window, 114–115
- Account dimension, 54, 84
- Actions menu, 334–335
- Actual/Prior Year threshold, 218
- Add As Child option, Member Set
  - Maintenance tab, 79
- Add Measure Filters dialog box, 229
- Add Member Columns dialog box, 229
- Add New Sibling command, 65, 81
- Add Or Remove Users dialog box, 113
- Add-in for Excel
  - connecting to planner server, 43–44
  - fulfilling assignments, 135–136
  - functions, 18–19, 31
  - installing, 42
  - navigation panel, 45
  - overview, 18
  - versions, 43
- Adding Measure Filters dialog box, 229
- administrator role
  - data source element permissions, 186
  - functions, 38
  - privileges, 39
  - rights, 37
- AdventureWorks
  - data sources, 163
  - database, 76
  - defined, 163
  - overview, 21–22
  - Performance Management, 286
- aggregation types, 181–182
- All Sales Territories option, Add Member
  - Columns dialog box, 229
- amount treasures, creating KPIs for, 209–219
- Analysis Services
  - cubes, 161
  - data sources, 165–168, 367
  - references, 361
  - time dimension, 184–186
  - tips, 367
- analysts, 14
- analytical methods, 308–309
- analytics charts. *See also* pivot charts
  - attributes, 259
  - browsing, 260
  - changing dimensions in, 326–327
  - changing line chart, 261
  - changing report style in, 346–347
  - collapsing data, 313
  - creating, 258–261
  - defined, 292–293
  - dimensions, 259
  - drilling up and down, 316–318
  - expanding data, 311–312
  - fields, 258–259
  - filtering members, 259–260
  - functions, 310
  - hiding empty rows and columns, 344
  - measures, 259
  - pivoting, 338
  - showing details, 332–333
- analytics grids
  - background, 251
  - browsing, 253
  - changing dimensions in, 326–328
  - changing report style in, 346–347
  - collapsing data, 313
  - columns, 251
  - creating, 250–253
  - data sources, 250–251
  - defined, 292–293
  - dimension members, 252–253
  - drilling up and down, 316–318
  - expanding data, 311–312
  - fields, 251
  - functions, 310
  - hiding empty rows and columns, 344

analytics grids (*continued*)  
 identifying source of issue in, 300–303  
 naming, 250  
 pivoting, 339–340  
 publishing, 253  
 rows, 251  
 showing details, 332–333  
 viewing, 252

Application Calendar  
 duration, 59  
 financial year, 58  
 naming, 58  
 optional frequencies, 59–60  
 pattern, 58–59  
 period naming conventions, 59–60  
 views, 61

application infrastructure, 16–17  
 application server address, 34–46  
 applications, planning. *See also*  
 dimensions; models  
 accessing model site, 49–51  
 Application Calendar, 57–61  
 Modeler interface, 52  
 overview, 49

Applied Microsoft Analysis Service  
 2005, 361

area chart type, 348–349

assignments. *See also* cycles  
 associating to cycles, 106–110  
 choosing users for, 107  
 defined, 101  
 fulfilling through Excel Add-in, 135–136  
 function of, 18  
 instantiating, 110  
 naming, 106–107  
 selecting, 108  
 users for, 107

assumption model, linking to, 92–94

attributes, 161, 259

authoring, 18

Auto-indent Row Members, 132

autospreading, 134

Average aggregation, 181

Average of Children option, Calculation  
 dialog box, 215

## • B •

Background field, Design tab, 259

bad indicators, 299–300

Balanced Scorecard methodology, 221

bands  
 endpoints, 208  
 by normalized value of actual to  
 target, 207  
 by numeric value of actual, 207, 220  
 by stated score, 207  
 thresholds, 208

banks, 160

bar chart, 346

blank indicator template, 199–200

borderline indicators, 299–300

Bottom Axis field, Design tab, 259

bottom *x* filter option, 344

bottom *x* percent option, 344

BPM (Business Performance  
 Management), 13

bubble chart type, 348–349

budgeting, 24

business dimensions, 25–26. *See also*  
 dimensions

Business Intelligence with Microsoft Office  
 PerformancePoint Server 2007, 363

business metrics. *See also* KPIs  
 breaking down, 27–28  
 determining, 26  
 and dimensions, 26  
 overview, 25–26  
 planning models, 32–34

business model  
 adding dimensions to, 89  
 building, 86–89  
 configuring security, 111–114  
 defined, 83  
 linking to assumption model, 92–94  
 overview, 30  
 predefined dimensions, 84–85  
 scheduling periodic updates, 89–91  
 subsites, 83, 95–98  
 types, 83–86

business operations, 26

business organization, 301  
 business performance  
   analytics grids, 300–303  
   locating data, 20  
   scorecards, 299–300  
   strategy maps, 305–306  
   trend analysis charts, 303–305  
 Business Performance Management (BPM), 13  
 business plans. *See* planning  
 Business Process dimension, 54, 84  
 business reports. *See* reports

## • C •

Calculation dialog box, 214–215  
 calendar  
   duration, 59  
   financial year, 58  
   naming, 58  
   optional frequencies, 59–60  
   pattern, 59  
   views, 61  
 Calendar Year dimension, 329  
 Category field, pivot table field list, 331  
 cells, formatting, 238–239  
 centered indicators, 195, 201  
 chart reports, 258–265. *See also* specific charts by name  
 charts, analytics. *See also* pivot charts  
   attributes, 259  
   browsing, 260  
   changing dimensions in, 326–327  
   changing line chart, 261  
   changing report style in, 346–347  
   collapsing data, 313  
   creating, 258–261  
   defined, 292  
   dimensions, 259  
   drilling up and down, 316–318  
   expanding data, 311–312  
   fields, 258–259  
   filtering members, 259–260  
   functions, 310  
   hiding empty rows and columns, 344  
   measures, 259  
   pivoting, 338  
   showing details, 332–333  
 charts, pivot  
   ad hoc visualizations, 261  
   changing dimensions in, 328–331  
   changing report style in, 348–349  
   collapsing data, 313  
   drilling up and down, 316–318  
   expanding data, 311–312  
   filtering, 344–345  
   functions, 310  
   recognizing, 295  
 charts, ProClarity  
   drilling to detail, 333–334  
   drilling up and down, 319–320  
   functions, 310  
   recognizing, 295–296  
 charts, trend analysis  
   creating, 262–264  
   defined, 294  
   forecast period, 264  
   functions, 310  
   key performance indicators, 262–263  
   naming, 262  
   predicting future with, 261–262, 303–305  
   scorecard, 262  
   time periods, 263  
   tips and tricks, 368  
 Check In link, Workspace Actions panel, 61, 76  
 Checks indicator graphics, 192  
 child KPIs, 235  
 Choose Application dialog box, 120–121, 127  
 Chris Webb’s BI blog, 361  
 collapsing data, 313  
 Column field, pivot table field list, 331  
 Column Template drop-down box, Edit Columns dialog box, 123  
 columns  
   formatting, 238–239  
   hiding empty, 344  
   member, 229  
   pivoting, 338–339  
   type, 181  
 Command and Options dialog box, 257

- companies, 34
  - Compare Data feature, 151, 153–155
  - Configuration Options box, Connection Settings window, 244
  - Configure PerformancePoint Add-In For Excel dialog box, 118
  - Connect dialog box, 42, 50
  - connection configuration dialog box, 119
  - Connection tab, 255
  - Consolidation Method dimension, 54, 84
  - corporate planners, 12–13
  - Count aggregation, 181
  - Create A Data Source Template dialog box, 166
  - Create A Filter dialog box, 276
  - Create A KPI dialog box, 210, 221
  - Create A Member Property link, Workspace Actions panel, 67
  - Create A Member Set dialog box, 77–78, 96–97
  - Create A Model Wizard, 86, 95
  - Create A Report dialog box, 250, 262
  - Create A View link, Create Calendar Views dialog box, 61
  - Create An Assignment Definition dialog box, 106–107
  - Create Calendar Views dialog box, 61
  - Create KPIs from Server Analysis Services Measures option, Scorecard Wizard, 227
  - Create Member Property dialog box, 66–68
  - Create New Indicator dialog box, 200
  - Create Sample Members option, Define Member Creation dialog box, 64
  - Create tab, 142
  - Creator role, 186
  - credentials, 244
  - CSV files
    - previewing, 70
    - in user-defined dimension, 68–70
  - cubes, 161
  - currency, 34
  - Currency dimension, 54, 84
  - current period updates
    - scheduling, 89–91
    - tips and tricks, 371
  - custom indicators, 199–204
  - Customer perspective, 221
  - Customize User Permissions check box, Workspace Actions panel, 114
  - Cycle Wizard, 102
  - cycles. *See also* assignments
    - associating forms and assignments to, 106–110
    - creating, 102–106
    - data-entry scope, 105
    - defined, 101
    - instantiating, 110
    - labeling, 102
    - model, 103
    - naming, 102–103
    - owner, 102
    - scope of, 104
    - start and end dates, 104–105
- D ●
- dashboard. *See also* dashboard filters
    - adding content to, 273–275
    - adding pages to, 285–286
    - analytics grids and charts, 292–293
    - creating, 145–146, 272–273
    - defined, 145
    - deploying to SharePoint site, 288
    - identifying business performance issues, 298–306
    - interface, 291–292
    - item endpoint, 282
    - layout of zones, 272–273
    - menus, 291
    - metrics, 298
    - naming, 272–273
    - opening, 290
    - overview, 271, 289–292
    - pages, 271
    - pivot tables and charts, 295
    - previewing, 286–287
    - ProClarity charts and grids, 295–296
    - ProClarity decomposition tree, 296–297
    - publishing, 275
    - reorganizing zones, 283–285
    - reports, 291
    - scorecards, 293
    - sizing zones, 283–285

- strategy maps, 293–294
- tabs, 291
- trend analysis chart, 294
- zones, 271, 291
- Dashboard Designer
  - downloading, 141
  - elements, 20, 143–146
  - frames, 141–142
  - opening, 140
  - screen layout, 141–142
  - server, 143
  - toolbar, 142
  - workspace, 141–143
- dashboard filters
  - adding to dashboard, 280
  - creating, 275–283
  - data sources, 277
  - defined, 271, 292
  - dimensions, 277
  - filtering dashboard, 342–343
  - hiding empty rows and columns, 345
  - links, 280–281
  - members, 129, 277–279
  - menus, 344
  - pivot tables, 344–345
  - property values, 130
  - selecting values from, 342–343
  - selection list, 279
  - source value, 282
  - templates, 276–277
  - viewing, 280
  - workspace, 275–276
- Dashboard Viewer, 21
- data. *See also* data sources
  - adding with Excel, 18–19
  - business performance, 20
  - collapsing, 311–315
  - drilling down, 316–320
  - drilling up, 316–320
  - expanding in reports, 311–315
  - filtering, 342–345
  - getting, 160
  - from multiple systems, 160–161
  - operational, 160–161
  - sorting, 340–341
- data administrator role, 38
- Data Link Properties dialog box, 255
- Data Mappings cell, 212
- data sources
  - aggregation types, 181–182
  - Analysis Services, 161, 165–168
  - defined, 145
  - element permissions, 186–188
  - Excel 2007, 170–175
  - Excel Services, 175–178
  - Excel spreadsheets, 162
  - external, 160
  - fact and dimension, 179–182
  - manager, 186
  - naming, 166–167
  - operational, 160–161
  - options, 165
  - owner, 163
  - scorecard, 226
  - setting properties of, 179–182
  - SQL table, 161–162, 168–170
  - templates, 165–166
  - time dimension, 182–186
  - tips and tricks, 370
  - type, 163
  - user-defined dimension, 71–76
  - versions, 163
  - viewing, 162–164
- data-entry scope, 105
- decision makers, 13–14
- default schemas, 370
- Define Dimension Structure From Data
  - Source option, Select Dimension Structure Source dialog box, 72
- Define Dimensions and Member Sets dialog box, 87–88
- Define Filters dialog box, 124
- Define Member Creation dialog box, 64, 70, 74
- Define Period Naming Conventions dialog box, 59
- Define Report Properties dialog box, 121
- Define The Calendar Pattern dialog box, 58
- Deploy Dashboard dialog box, 288
- Deploy Dashboard To Preview Site dialog box, 286
- Destination Member Set panel, 79–80
- Details frame, 146
- developers, 13

- Dimension Property Filter dialog box, 130
  - Dimensional Data Source Mapping dialog box, 213
  - dimensions. *See also* predefined dimensions; user-defined dimensions
    - adding to existing models, 89
    - adding to scorecard, 233–234
    - breaking down, 27–28
    - building, 53–57
    - and business metrics, 26
    - column, 181
    - configuring, 62
    - drilling down, 322–325
    - headers, 232
    - list of, 56
    - member property, 66–67
    - member sets, 77–80
    - members, 229–230
    - removing, 231–234, 329
    - scenario, 80–82
    - scorecard, 229–230
    - slicing and dicing, 325–331
    - values, 229–230
  - Dimensions panel, 55–57
  - directory, saving workspace file to, 150
  - Display Folder Location field, Create A Data Source dialog box, 168
  - document library, 248
  - document map, 246
  - donut chart type, 348–349
  - Drill Down To report option, 322–325
  - drilling down, 308–309, 316–321
  - drilling to detail
    - analytics chart, 332–333
    - analytics grid, 332–333
    - defined, 309
    - ProClarity grids and charts, 333–334
    - with reporting actions, 334–335
    - scorecard, 332–333
  - drilling up, 308, 316–321
- **E** ●
- Edit Banding Settings dialog box, 215, 220
  - Edit Columns dialog box, 123
  - Edit Filter Link dialog box, 280
  - Edit Item dialog box, 284
  - Edit Rows dialog box, 122
  - Edit tab, 142
  - Editor role, 186
  - Editor tab, 167
  - elements
    - deleting, 151–153
    - overview, 20, 143–146
    - publishing, 151
    - reusability of, 145–146
    - reverting to current server version, 155
    - reverting to older version, 155–157
    - saving, 149–151
    - for scorecards, 224–230
    - security, 367
    - uses of, 145–146
    - viewing in Workspace Browser, 147–149
    - viewing on server, 146–147
    - workspace versus server versions, 153–155
  - empty columns, hiding, 344
  - empty rows, hiding, 344
  - EndPoint UniqueName field, Compare Workspace Version with Server Version information box, 154
  - Enter Worst Value box, Edit Banding Settings dialog box, 217
  - entities, 34
  - Entity dimension, 54, 84
  - Excel
    - adding data with, 18–19
    - connecting to planner server, 120
    - data sources, 170–175
    - data type properties, 179–182
    - editing data set, 172–174
    - exporting pivot tables to, 354–356
    - exporting reports to, 350–354
    - form templates, 126
    - importing data from, 170–172
    - PerformancePoint tab, 118
    - spreadsheets, 162
    - time dimension, 182–186
    - viewing reports, 353–355
    - workbook, 248
  - Excel add-in
    - connecting to planner server, 43–44
    - fulfilling assignments, 135–136
    - functions, 18–19, 31
    - installing, 42
    - navigation panel, 45
    - overview, 17–18
    - versions, 43

Excel Services  
 data sources, 175–178  
 reports, 248  
 SharePoint site of workbook, 248  
 Excel Workbook field, Editor tab, 248  
 Exchange Rate dimension, 54, 85  
 executive management, 13–14  
 expanding data  
 analytics grids, 311–312  
 charts, 311–312  
 pivot charts, 311–312  
 pivot tables, 311–312  
 ProClarity grids, 313–315  
 scorecards, 311–312  
 exporting reports  
 to Excel, 348–356  
 to PowerPoint, 350–354  
 Extensible Markup Language (XML), 154

## ● **F** ●

Filter field, pivot table field list, 331  
 filters  
 adding to dashboard, 280  
 creating, 275–283  
 data sources, 277  
 defined, 292  
 dimensions, 277  
 filtering dashboard, 342–343  
 hiding empty rows and columns, 345  
 links, 280–281  
 members, 129, 277–279  
 menus, 344  
 pivot tables, 344–345  
 property values, 130  
 selection list, 279  
 source value, 282  
 templates, 276–277  
 viewing, 280  
 workspace, 275–276  
 Financial perspective, 221  
 financial year, 58  
 Find A User panel, Planning Administrative Console, 37  
 First Occurrence aggregation, 181  
 Fixed Values Data Source Mapping dialog box, 212  
 Flags indicator graphics, 192

Flow dimension, 54, 85  
 Follow the Pattern option, Define The Calendar Pattern dialog box, 59  
 fonts, formatting, 239  
 forecasting, 24  
 form templates  
 autospreading, 134  
 building with Report Wizard, 120–126  
 columns, 123  
 creating with matrix, 127–131  
 current period updates, 371  
 Excel, 126  
 filters, 124–125  
 formatting, 370  
 indented row heading, 132–133  
 matrix style, 131  
 model, 121  
 naming, 121  
 overview, 120  
 publishing, 126–127  
 refining, 131–134  
 rows, 122  
 setting properties of, 132–133  
 time members, 123  
 tips and tricks, 370  
 forms  
 assigning to cycles, 106–110  
 overview, 99–100  
 report options, 124  
 reviewing and approving, 109  
 submission period, 108  
 Forms And Reports link, Workspace Browser, 99–100  
 framework, planning  
 overview, 34–35  
 PerformancePoint Add-in for Excel, 42–45  
 Planning Administrative Console, 35–41  
 Planning Business Modeler, 41–42

## ● **G** ●

Gauges indicator graphics, 193–194  
 Geography dimension, 301  
 global administrator  
 functions, 38  
 overview, 16  
 privileges, 39  
 rights, 37

- Global Assumption Model option, Select
    - A Type drop-down list, Select Data
    - Source And Type dialog box, 93
  - good indicators, 299–300
  - Google, 364
  - graphics, indicator
    - blank template, 199–200
    - centered categories, 195
    - Checks, 192
    - copying and pasting, 198
    - creating from existing graphics, 191–198
    - custom, 198–204
    - defined, 144
    - editing, 201
    - Flags, 192
    - Gauges, 193–194
    - number of levels, 201
    - opening, 190–191
    - options menu, 195
    - permissions, 199
    - Progress bars, 193–194
    - Quarters, 193–194
    - Red to Black, 193
    - security settings, 199
    - selecting, 202–203
    - selecting categories, 195
    - Smiley faces, 191
    - standard categories, 195
    - Stoplights, 191
    - templates, 197
    - Thermometers, 191
    - Trend indicators, 193
    - viewing, 190–191
    - Weather, 193
  - grid reports, 249–258, 341. *See also* grids,
    - analytics; grids, ProClarity; pivot tables
  - grids, analytics
    - background, 251
    - browsing, 253
    - changing dimensions in, 326–328
    - changing report style in, 346–347
    - collapsing data, 313
    - columns, 251
    - creating, 250–253
    - data sources, 250–251
    - defined, 292
    - dimension members, 252–253
    - drilling up and down, 316–318
    - expanding data, 311–312
    - fields, 251
    - functions, 310
    - hiding empty rows and columns, 344
    - identifying source of issue in, 300–303
    - naming, 250
    - pivoting, 339–340
    - publishing, 253
    - rows, 251
    - showing details, 332–333
    - viewing, 252
  - grids, ProClarity
    - drilling to detail, 333–334
    - drilling up and down, 319–321
    - expanding and collapsing data with, 313–315
    - functions, 310
    - recognizing, 295–296
  - gross profit margin, indicator for, 195
  - GrossProfitMarginKPI, 228, 236
- H ●
- help files, 364
  - hierarchies, 161, 164, 311, 322
  - History dialog box, 155
  - hit ratios, indicator for, 195
  - Home tab, 142
- I ●
- Ignore field, Details pane, 181
  - Import Members From The Selected Source
    - option, Define Member Creation dialog box, 70
  - indicator dialog boxes, 195
  - indicators
    - blank template, 199–200
    - centered categories, 195
    - Checks, 192
    - copying and pasting, 198
    - creating from existing graphics, 191–198
    - custom, 198–204
    - defined, 144
    - editing, 201
    - Flags, 192
    - Gauges, 193–194

- number of levels, 201
- opening, 190–191
- options menu, 195
- overview, 189–190
- permissions, 199
- Progress bars, 193–194
- Quarters, 193–194
- Red to Black, 193
- security settings, 199
- selecting, 202–203
- selecting categories, 195
- Smiley faces, 191
- standard categories, 195
- Stoplights, 191
- templates, 197
- Thermometers, 191
- Trend, 193
- viewing, 190–191
- Weather, 193
- insurance companies, 160
- Intercompany dimension, 54, 85
- Internal Business perspective, 221
- Internet Explorer, printing in, 356–357
- IT Toolbox community, 364–365
- Item Name box, Editor tab, 178

## • J •

- jobs, 101

## • K •

- Kevin White's PerformancePoint blog, 361
- KPI View Settings dialog box, 236–237
- KPIs (key performance indicators)
  - adding targets to, 210–211
  - assembling items for, 206
  - banding method, 206–207
  - calculation methods, 215
  - child, 235
  - creating for amount treasures, 209–219
  - creating for ratio measures, 219–220
  - data mappings, 212
  - data sources, 212
  - default calculations, 368
  - default thresholds, 208
  - defined, 144, 298
  - editing, 211

- identifying, 299–300
- indenting, 235
- making decisions with, 12
- metrics, 298
- naming, 210
- overview, 205
- reordering, 236
- rolling into groups with objectives, 221–222
- scoring pattern, 206
- selecting, 227
- setting actual data, 213
- setting objectives by indenting, 235
- strategy maps, 305–306
- visualizing, 208–209
- weight, 236–238

## • L •

- Largest to Smallest sorting order, 341
- leaf-level members, 77
- Learning and Growth perspective, 221
- line chart, 346
- line chart with markers, 346
- lines, 348–349
- Link Items tab, 280
- Link Options tab, 281
- local tier, 143
- losses, indicator for, 195

## • M •

- Manage Assumptions dialog box, 94
- master time dimension, 183
- Matrix Styles dialog box, 131
- Max of Children option, Calculation dialog box, 215
- MDX Query filter template, 276
- measure column, 181
- measures
  - in analytics chart, 259
  - banding method, 216
  - calculation type, 214–215
  - changing, 327
  - creating, 209–219
  - data mappings, 212
  - data sources, 213
  - defined, 161

- measures (*continued*)
    - percentage values, 217
    - in pivot tables and charts, 328–331
    - ratio, 219–220
    - scoring pattern, 215–216
    - selecting, 214
    - target, 211
    - thresholds, 218
    - worst value, 216
  - Member Maintenance tab, 55
  - member property, adding, 66–68
  - Member Selection filter template, 276
  - Member Set Maintenance tab, 55, 79
  - member sets
    - configuring access to, 114–116
    - creating, 370–371
    - dimensions, 77–80
    - naming, 77
  - members, leaf-level, 77
  - menus, 291
  - metrics. *See also* KPIs
    - breaking down, 27–28
    - determining, 26
    - and dimensions, 26
    - overview, 25–26
    - planning models, 32–34
  - Microsoft Business Intelligence Platform, 361
  - Microsoft community, joining, 363
  - Microsoft Excel
    - adding data with, 18–19
    - connecting to planner server, 120
    - data sources, 170–175
    - data type properties, 179–182
    - editing data set, 172–174
    - exporting pivot tables to, 354–356
    - exporting reports to, 348–356
    - form templates, 126
    - importing data from, 170–172
    - PerformancePoint tab, 118
    - spreadsheets, 162
    - time dimension, 182–186
    - viewing reports, 353–355
    - workbook, 248
  - Microsoft Excel add-in
    - connecting to planner server, 43–44
    - fulfilling assignments, 135–136
    - functions, 18–19, 31
    - installing, 42
    - navigation panel, 45
    - overview, 17–18
    - versions, 43
  - Microsoft OLE DB Provider for Analysis Services, 255
  - Microsoft PerformancePoint blog, 361
  - Min of Children option, Calculation dialog box, 215
  - Minimum aggregation, 181
  - Modeler interface. *See* Planning Business Modeler
  - modeler role
    - adding user as, 40–41
    - functions, 38
  - models. *See also* process management; security
    - adding dimensions to, 89
    - building, 86–89
    - configuring security, 111–114
    - defined, 83
    - linking to assumption model, 92–94
    - overview, 83
    - predefined dimensions, 84–85
    - scheduling periodic updates, 89–91
    - subsites, 83, 95–98
    - types, 84–86
  - Models Summary tab, 97
  - Monitoring and Analytics
    - AdventureWorks, 21–22
    - components, 19
    - Dashboard Designer, 20, 140–141
    - Dashboard Viewer, 21
    - data sources, 20, 367
    - element security, 367
    - Monitoring Server, 20–21
    - overview, 10
    - ProClarity URL tricks, 368
    - SharePoint Server, 21
    - trend analysis chart, 368
  - Monitoring Server, 20–21
  - Moore Stephens Business Solutions, 365
  - Multi-Select tree, 279
- *N* ●
- Name The Application Calendar dialog box, 58
  - Name The Dimension dialog box, 63
  - Name The Model dialog box, 93, 96

Name The Scorecard dialog box, 225  
Named Sets filter template, 277  
New Matrix dialog box, 128  
No Member member, 65, 80  
No Value calculation type, 215  
normalized value, banding by, 207  
Notepad, 68  
numeric value of actual, banding by, 207

## • O •

ODBC (Online Database Connection), 162  
Open File dialog box, 202  
operational data, 160–161  
operations, business, 26  
optional frequencies, 59–60  
owner  
  of cycles, 102  
  of data sources, 163

## • P •

PAS (ProClarity Analysis Services)  
  configuration options, 244–245  
  library, 244  
  selecting report, 244  
  server address, 243  
  tips and tricks, 368–369  
PAS Browser dialog box, 243  
PEL (PerformancePoint Expression Language), 361  
performance. *See* business performance  
PerformancePoint Add-in connection  
  dialog box, 44  
PerformancePoint Add-in for Excel  
  connecting to planner server, 43–44  
  fulfilling assignments, 135–136  
  functions, 18–19, 31  
  installing, 42  
  navigation panel, 45  
  overview, 18  
  versions, 43  
PerformancePoint Expression Language (PEL), 361  
PerformancePoint Monitoring and Analytics  
  AdventureWorks, 21–22  
  components, 19

  Dashboard Designer, 20, 140–141  
  Dashboard Viewer, 21  
  data sources, 20, 367  
  element security, 367  
  Monitoring Server, 20–21  
  overview, 10  
  ProClarity URL tricks, 368  
  SharePoint Server, 21  
  trend analysis chart, 368  
PerformancePoint Planning component,  
  10, 15–17. *See also* Planning Business Modeler; Planning Server  
PerformancePoint Professionals group, 363  
PerformancePoint Server 2007 (PPS)  
  decision-making, 11–12  
  integration, 9–10  
  overview, 1–5, 9  
  planning with, 11  
  reports, 11  
  users of, 12–14  
Period time dimension, 183  
permissions, 199  
perspectives, 221  
pie charts, 346, 348–349  
pivot charts. *See also* analytics charts  
  ad hoc visualizations, 261  
  changing dimensions in, 328–331  
  changing report style in, 348–349  
  collapsing data, 313  
  drilling up and down, 316–318  
  expanding data, 311–312  
  filtering, 344–345  
  functions, 310  
  recognizing, 295  
pivot tables  
  changing dimensions in, 328–331  
  collapsing data, 313  
  creating, 255–257  
  cube, 257  
  data sources, 255–256  
  defined, 295  
  expanding data, 311–312  
  exporting to Excel, 354–356  
  filtering, 344–345  
  functions, 310  
  naming, 255  
  pros and cons of, 254  
  removing dimensions from, 329  
  security access, 256

- pivoting
  - analytics chart, 338
  - analytics grid, 339–340
  - columns, 338–339
  - reports, 338–340
  - rows, 340
- planners, 12–13
- planning. *See also* framework, planning;  
planning applications
  - budgeting, 24
  - business dimensions and metrics, 25–26,  
28–29
  - business models, 30–32
  - business operations, 25
  - data analysis, 30
  - forecasting, 24
  - framework, 34–46
  - numbers, 32–34
  - overview, 23
  - process management, 26–28
  - streamlining process, 27–28
- Planning Administrative Console
  - access screen, 36
  - accessing, 34–35
  - connecting, 35
  - forms and reports, 100
  - overview, 16–17, 35–41
  - tips and tricks, 369
- planning and budget databases, as data  
source, 160
- planning applications. *See also* dimensions;  
models
  - accessing model site, 49–51
  - Application Calendar, 57–61
  - Modeler interface, 52
  - overview, 49
- Planning Business Modeler. *See also*  
dimensions
  - accessing, 41–42, 49–51
  - Application Calendar, 57–61
  - building model with, 18, 86–89
  - configuring access to member set,  
114–116
  - connecting to application server, 41–42
  - functions, 31
  - interface, 52
  - overview, 15
  - primary panel, 52
  - Workspace Actions panel, 52
  - Workspace Browser, 52
- Planning component, PPS, 10, 15–17.  
*See also* Planning Business Modeler;  
Planning Server
- planning models, metrics, 32–34
- Planning Server
  - architecture, 17
  - components, 16–17
  - connecting through Excel, 118–120
  - functions, 31
  - overview, 16
  - path to, 50
  - roles, 38
- plans, building, 25
- polar chart type, 348–349
- port number, 34–46, 50
- Power reader role, 186
- PowerPoint, exporting reports to, 350–354
- PPS (PerformancePoint Server 2007)
  - decision-making, 11–12
  - integration, 9–10
  - overview, 1–5, 9
  - planning with, 11
  - reports, 11
  - users of, 12–14
- PPSAnalyticsChart, 148, 274
- PPSDashboard, 148
- PPSLineChart report, 154
- PPSSQLTable data source, 169
- predefined dimensions
  - configuring, 62
  - description of, 54–55
  - models, 84–85
  - overview, 53
- presentations
  - exporting, 350–356
  - overview, 349–350
  - printing, 356–357
- Preview Data button, View tab, 179
- printing reports, 356–357
- Prior Year thresholds, 218
- process management
  - assignments, 101
  - associating forms and assignments to  
cycle, 106–110

- creating cycles, 102–106
- jobs, 101
- overview, 100–101
- ProClarity Analysis Services (PAS)
  - configuration options, 244–245
  - library, 244
  - selecting report, 244
  - server address, 243
  - tips and tricks, 368–369
- ProClarity charts
  - drilling to detail, 333–334
  - drilling up and down, 319–320
  - functions, 310
  - recognizing, 295–296
- ProClarity decomposition tree
  - functions, 310
  - recognizing, 296–297
- ProClarity grids
  - drilling to detail, 333–334
  - drilling up and down, 319–321
  - expanding and collapsing data with, 313–315
  - functions, 310
  - recognizing, 295–296
- ProClarity reports, 243–245
- ProClarity version 6.3, 10
- Progress bars, 193–194
- Publish All icon, Home tab, 151
- Publish Item icon, Home toolbar, 232
- publishing
  - elements, 151
  - form templates, 127
- **Q** •
- Quarters indicator graphics, 193–194
- **R** •
- radar chart type, 348–349
- ratio KPIs, 219–220
- ratio measures, 219–220
- Rational Guide to Planning with Microsoft PerformancePoint Server 2007, 362
- rdx files, 245
- Read Access Edit button, Planning Business Modeler, 115
- Reader role, 186
- Red to Black indicator graphics, 193
- Reference Date section, Time tab, 185
- references
  - Analysis Services, 361
  - Google, 364
  - help files, 364
  - IT Toolbox community, 364–365
  - Microsoft community, 363
  - Moore Stephens Business Solutions, 365
  - PerformancePoint blogs, 361
  - PerformancePoint Expression Language, 361
  - PPS user groups, 363
- region dimensions, 28–29, 77
- regions, 34
- Remove Field option, reporting options menu, 329
- report actions, 334–335
- Report Options dialog box, 124–125
- Report Wizard, 120–126
- Reporting Services
  - configurations, 245
  - document map, 246
  - parameters, 246–247
  - reports, 245–248
  - server name, 245
- reports
  - actions, 334–335
  - analytical functionality, 309–310
  - analytical methods, 308–309
  - analytics charts, 258–261, 292–293, 315–318
  - analytics grids, 250–254, 292–293, 311–313, 315–318
  - changing style, 346–349
  - chart, 258–265
  - collapsing data, 311–315
  - columns, 251
  - creating report element from existing, 242–243
  - in dashboard, 291
  - data sources, 250–251
  - defined, 145, 291
  - detail records, 332–335
  - dimension members, 252–253
  - Drill Down To option, 322–325

reports (*continued*)

- drilling up and down, 315–322
- Excel Services, 248
- expanding data, 311–315
- exporting, 349–356
- filtering, 342–345
- grid, 249–258
- identifying business performance issues, 298–306
- making decisions with, 297–298
- metrics, 298
- naming, 250
- older version, viewing, 157
- overview, 99–100, 241, 291–292, 307, 337–338
- pivot charts, 295, 315–318
- pivot tables, 254–258, 295, 311–313
- pivoting, 338–340
- printing, 356–357
- ProClarity, setting up, 243–245
- ProClarity charts, 295–296, 319–321, 333–334
- ProClarity decomposition trees, 296–297
- ProClarity grids, 295–296, 311–315, 319–321, 333–334
- publishing, 253
- Reporting Services, 245–248
- scorecards, 293, 311–313
- slicing and dicing dimensions, 325–331
- sorting data in, 340–341
- strategy maps, 265–268, 293–294
- templates, 243
- trend analysis charts, 261–265, 294
- workspace versus server versions, 154
- ReportView Custom Data field, Compare Workspace Version with Server Version information box, 154
- retail organizations, 160
- Revert Changes icon, Workspace Browser, 156
- Review And Approval dialog box, 109
- Review And Create dialog box, 65, 78, 126
- Review and Create Model dialog box, 88
- roles
  - access rights, 114–116
  - assigning users to, 112–114

- configuring access to member set by, 114–116
- creating, 111–112
- data source element permissions, 186–188
- Row field, pivot table field list, 331
- rows
  - formatting, 238–239
  - hiding empty, 344
  - pivoting, 340

## ● S ●

- Sales Amount column
  - Design tab, 251
  - View tab, 180
- sales amount, indicator for, 195
- Sales Amount Quota column, Design tab, 251
- Sales Territory dimension, 251
- SalesAmountKPI, 228
- SalesAmountVariance column, Design tab, 251
- SalesObjectiveKPI, 228
- Save Privately option, Actions tab, 135
- scatter plots, 348–349
- scenario dimension
  - configuring, 80–82
  - defining, 81
  - description of, 54
  - overview, 85
- Scenario selector, 104
- Schedule Current Period dialog box, 90
- score, banding by, 207
- Score Rollup Weight box, KPI View Settings dialog box, 237
- Scorecard Wizard, 227
- scorecards
  - adding dimensions to, 233–234
  - attributes, 233
  - choosing KPI source, 227–228
  - collapsing data, 313
  - creating elements, 224–230
  - data sources, 226
  - defined, 145, 293
  - dimension members, 229–230

- dimension values, 229–230
- expanding data, 311–312
- fonts, 239
- formatting, 238–239
- functions, 310
- identifying issues in, 299–300
- naming, 225
- overview, 223
- removing dimensions from, 231–232
- showing details, 332–333
- for trend analysis chart, 262–263
- scoring pattern
  - options, 216
  - for ratio measures, 219
  - setting, 206
- security
  - assigning users to roles, 112–114
  - configuring, 111–114
  - creating roles for, 111–112
- Select A Dashboard Filter Template dialog box, 276
- Select A Dashboard Page Template dialog box, 272, 285–286
- Select a Data Source dialog box, 212
- Select a Data Source Template dialog box, 165, 168, 170, 176
- Select A Date Source dialog box, 262
- Select A KPI dialog box, 227, 267
- Select a KPI Template dialog box, 209
- Select A Measure drop-down box, Dimensional Data Source Mapping dialog box, 213
- Select A Model dialog box, 103
- Select A Model Site drop-down box, Planning Business Modeler, 50
- Select A Report dialog box, 242
- Select A Scorecard Template dialog box, 224–225
- Select a Template dialog box, 221
- Select Additional Properties dialog box, 73–74
- Select An Application drop-down box, Planning Business Modeler, 50–51
- Select Data Source And Type dialog box, 87, 93, 96
- Select Dimension And Hierarchy dialog box, 122
- Select Dimension Structure Source dialog box, 63–64, 69, 72, 229
- Select Filters dialog box, 129
- Select KPIs to Improve view, Scorecard Wizard, 227
- Select Member Set Creation Option dialog box, 77–78, 98
- Select Members dialog box, 104, 122–123, 130, 233, 251–252
- Select Members icon, Dimensional Data Source Mapping dialog box, 213
- Select Optional Frequencies dialog box, 59–60
- Select Owner dialog box, 102
- Select Show Docmap check box, Select SQL Server Report dialog box, 246
- Select Show Parameter check box, Select SQL Server Report dialog box, 246
- Select SQL Server Report dialog box, 245
- Select The KPIs dialog box, 262
- Select Time Period frame, Create a Trend Analysis Chart Report dialog box, 263–264
- Select Values For Required Properties dialog box, 73
- Series field, pivot table field list, 331
- Series frame, Design tab, 258–259
- server
  - Compare Data feature, 153–155
  - deleting elements from, 152–153
  - overview, 143
  - saving elements to, 151
  - viewing elements on, 146–147
- Server Mode box, Reporting Services Report Editor tab, 245
- Server URL field, ProClarity reports, 243
- Set Current Period To box, Schedule Current Period dialog box, 90
- SharePoint list, 162
- SharePoint Server
  - defined, 143
  - overview, 21
- SharePoint Site field, Editor tab, 248
- Show Details reporting option, 332–333

- Show Toolbar check box, Select SQL Server Report dialog box, 246
  - Smiley faces, 191
  - smooth lines, 348–349
  - sorting data, 340–341
  - Source Data option, Calculation dialog box, 215
  - Specify A Location page, Deploy Dashboard dialog box, 288
  - Specify Assumptions dialog box, 88
  - Specify Percentage of Dashboard method, 284
  - Specify Values For Required Properties dialog box, 73
  - Spreading Type box, Options dialog box, 134
  - spreadsheets, as data source, 160
  - SQL Server Management Studio, 76
  - SQL tables
    - data source, 168–170
    - data type properties, 179–182
    - overview, 161–162
    - time dimension, 182–186
  - stacked bar chart, 346
  - standard indicators, 195, 201
  - Start And End Date dialog box, 104
  - Statistical Standard Deviation aggregation, 181
  - Statistical Variance aggregation, 181
  - stock chart type, 348–349
  - Stoplights indicator graphics, 191
  - strategy maps
    - analyzing, 306
    - connecting KPIs to map shapes, 267
    - creating, 265–268
    - defined, 293–294
    - editing, 266
    - functions, 310
    - publishing, 268
    - Visio diagram, 266–267
  - Submission Period dialog box, 108
  - Submit Draft option, Actions tab, 135
  - Submit Final option, Actions tab, 135
  - subsite
    - creating, 95–98
    - defined, 83
  - Sum aggregation, 181–182
  - Sum of Children option, Calculation dialog box, 215
  - Summary tab, 55
- T •**
- table key, 181
  - tables, pivot
    - changing dimensions in, 328–331
    - collapsing data, 313
    - creating, 255–257
    - cube, 257
    - data sources, 255–256
    - defined, 295
    - expanding data, 311–312
    - exporting to Excel, 354–356
    - filtering, 344–345
    - functions, 310
    - naming, 255
    - pros and cons of, 254
    - removing dimensions from, 329
    - security access, 256
  - tables, SQL
    - data source, 168–170
    - data type properties, 179–182
    - overview, 161–162
    - time dimension, 182–186
  - tabs, dashboard, 291
  - tabular list data source templates, 165, 168, 170, 176
  - Tabular Values filter template, 277
  - templates, form
    - autospreading, 134
    - building with Report Wizard, 120–126
    - columns, 123
    - creating with matrix, 127–131
    - current period updates, 371
    - Excel, 126
    - filters, 124–125
    - formatting, 370
    - indented row heading, 132–133
    - matrix style, 131
    - model, 121
    - naming, 121
    - overview, 120
    - publishing, 126–127
    - refining, 131–134

- rows, 122
  - setting properties of, 132–133
  - time members, 123
  - tips and tricks, 370
  - Test Connection button
    - Configure PerformancePoint Add-in For Excel dialog box, 119
    - Editor tab, 178
  - Text option, Create Member Property dialog box, 67
  - Thermometers indicator graphics, 191
  - thresholds, 208, 218
  - Time Aggregation Drop-Down arrows, Time tab, 186
  - time dimension. *See also* dimensions
    - Analysis Services data source, 184–186
    - description of, 55, 85
    - Excel data sources, 182–186
    - master, 183
    - SQL data sources, 182–186
    - use of, 301
  - Time Intelligence filter template, 182, 277
  - Time tab, 183–186
  - tips and tricks
    - Analysis Services as M&A data source, 367
    - connections for planning, 368
    - creating member sets, 370–371
    - current period updates, 371
    - data sources, 370
    - default calculations for KPIs, 368
    - default schemas, 370
    - formatting planning form templates, 370
    - ProClarity Analysis Services, 368–369
    - setting up element security in M&A, 367
    - trend analysis chart, 368
  - top *x* filter option, 344
  - top *x* percent filter option, 344
  - trend analysis charts
    - creating, 262–264
    - defined, 294
    - forecast period, 264
    - functions, 310
    - key performance indicators, 262–263
    - naming, 262
    - predicting future with, 261–262, 303–305
    - scorecard, 262
    - time periods, 263
    - tips and tricks, 368
  - Trend indicators, 193
- U •
- Update Member Property link, Workspace Actions panel, 67
  - Update Time box, Schedule Current Period dialog box, 90
  - Use Standard Connection option, data source properties tab, 169
  - Use Windows Credential check box, PAS Browser dialog box, 244
  - user administrator
    - functions, 38
    - privileges, 39
  - User dimension, 55, 85
  - user-defined dimensions
    - additional properties, 73–74
    - creating, 62–66
    - data source, 71–76
    - defined, 53
    - member creation, 64, 74
    - member property, 66–68
    - naming, 63
    - structure source, 63–64
    - using CSV file to build, 68–70
  - users
    - analysts, 14
    - corporate planners, 12–13
    - decision makers, 13–14
    - developers, 13
    - executive management, 13–14
    - Planning Administrative Console, 35–38
  - Users button, Planning Administrative Console, 37
  - utilization rates, indicator for, 195
- V •
- View tab, 179–180
  - Visio diagram, 266–267

• *W* •

Weather indicator graphics, 193  
workspace  
    comparing versions of element in,  
        153–155  
    defined, 143  
    graphics, 203  
    saving, 150  
    screen layout, 141–142  
    versus server, 143  
Workspace Actions panel, 52, 55–56, 67  
Workspace Browser  
    configuring access to member set,  
        114–115  
    deleting elements from, 152  
    Dimensions panel, 55–57  
    Forms And Reports link, 99–100  
    overview, 52  
    viewing elements in, 147–149

Write Access Edit button, Planning  
    Business Modeler, 115

• *X* •

XML (Extensible Markup Language), 154

• *Z* •

zone, dashboard  
    adding, 283–285  
    defined, 271, 291  
    layouts, 272–273  
    renaming, 285  
    reorganizing, 283  
    resizing, 284–285