MyResults:
Enterprise Business Reporting
User Guide

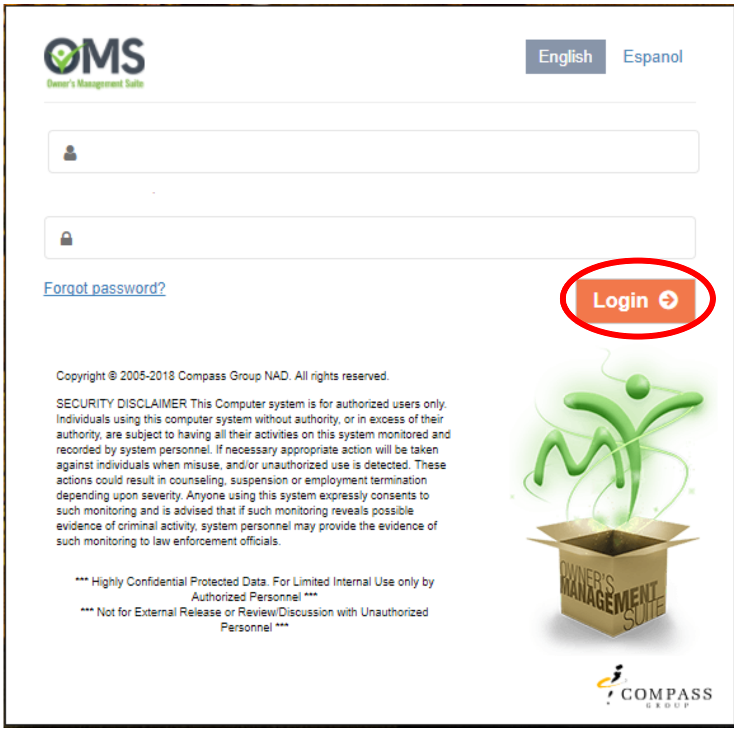
Contents

Help

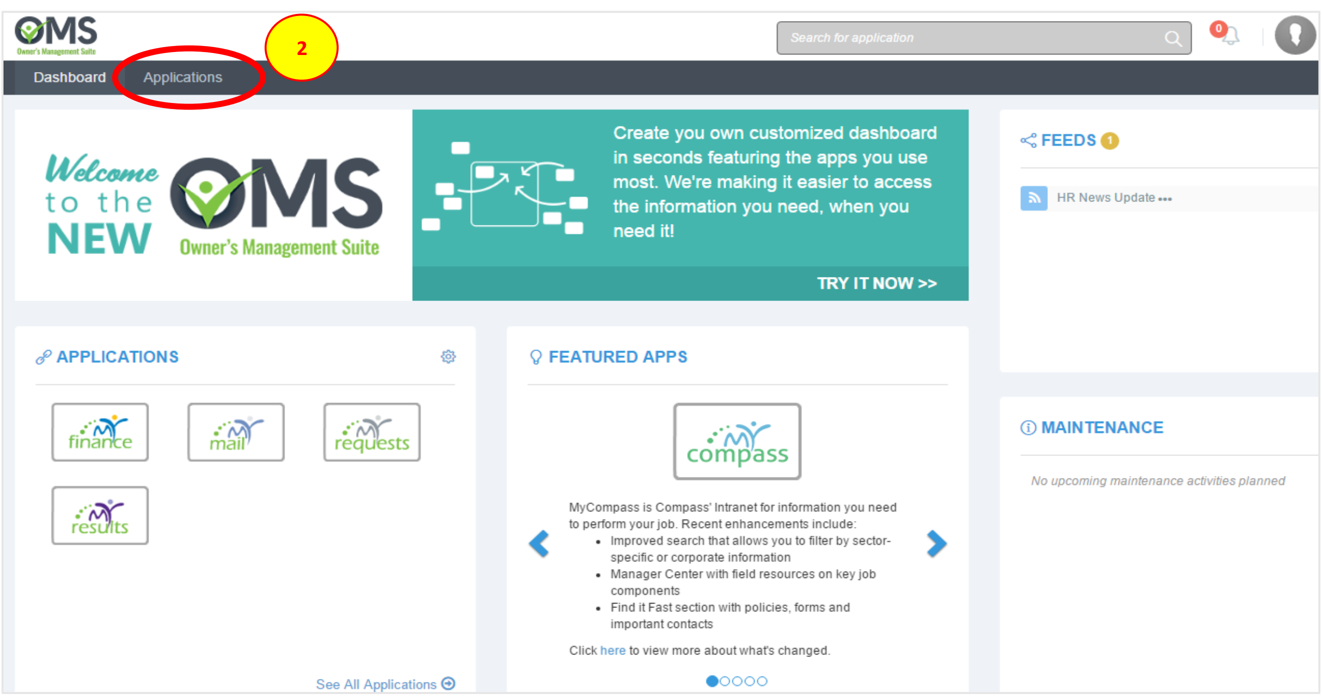
Please send any questions or issues with the MyResults Enterprise Business Reporting tool to MyResults@compass-usa.com or check out our Data & Analytics site.

Logging in:

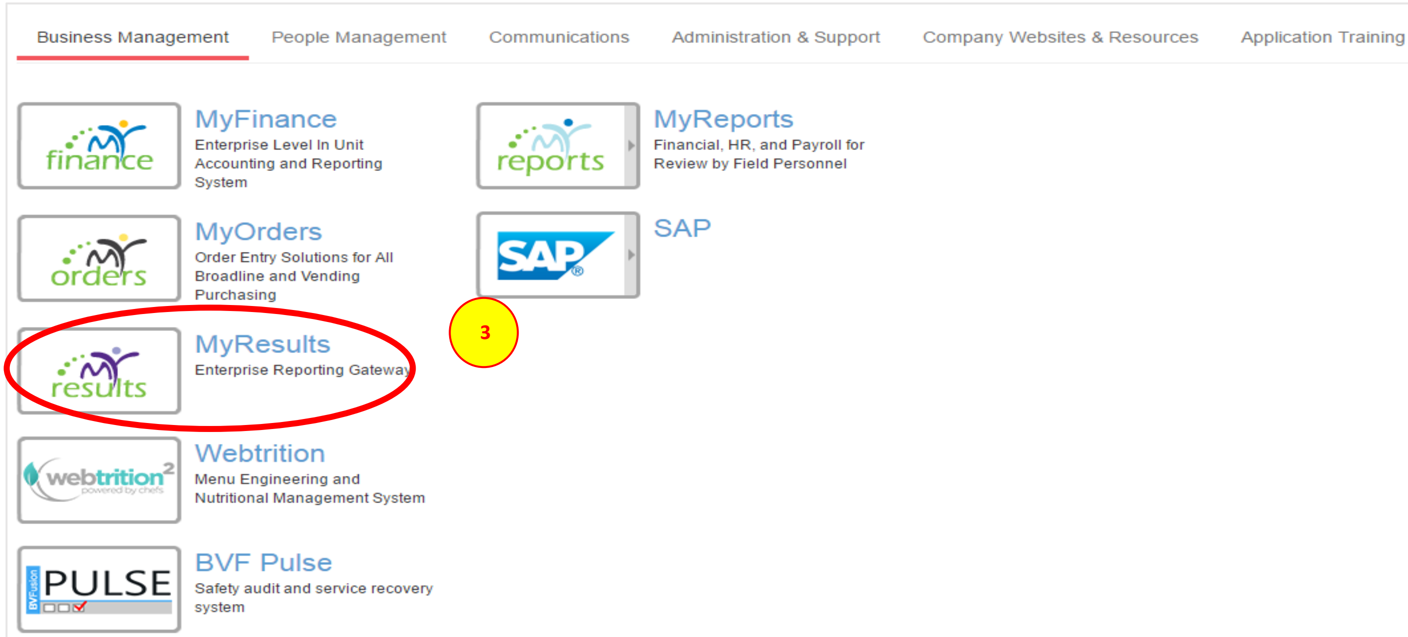
Go to https://www.compassmanager.com. Enter your Compass network ID and password and select **Login** (#1).



After successfully logging in, click on **Applications** (#2)



Click on **MyResults** (#3) to go into reporting.

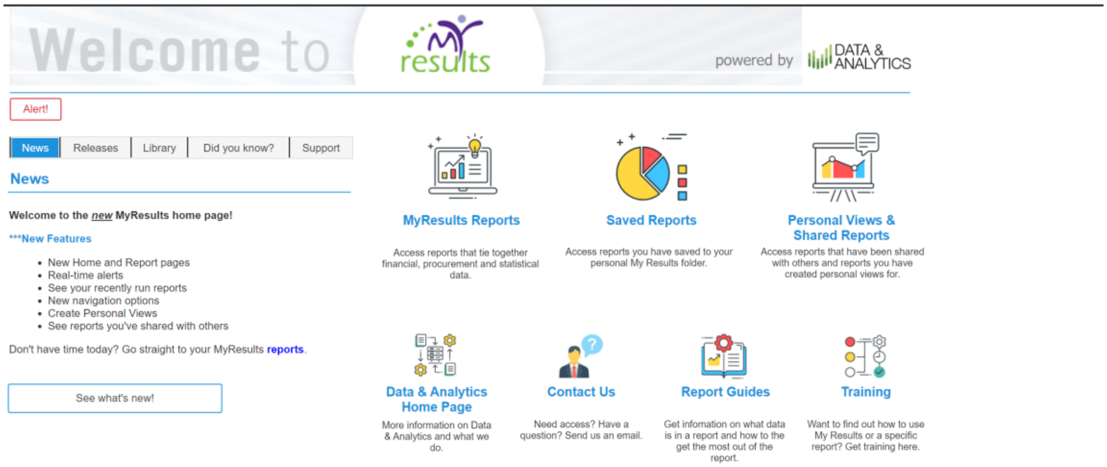


NOTE	*MyResults has enhanced performance in Google Chrome. If you experience difficulty viewing your toolbar, etc., run MyResults in Google Chrome instead!*

Welcome to MyResults page:

The Welcome page of MyResults has five areas; **Releases** – with important information regarding outages and contact information for MyResults support; **Did You Know??** – with helpful hints and tips about MyResults; **News** – with a summary of new reports and changes; **Library** – with resources to help users and **Support –** with contact information for MyResults questions and concerns.

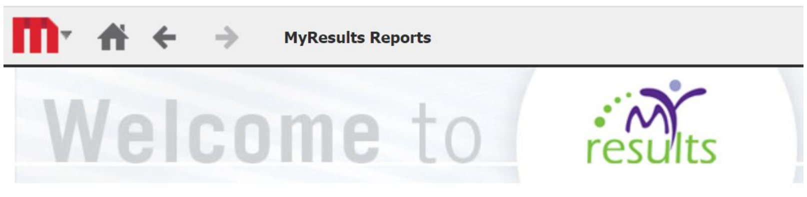
To begin using the MyResults tool click on **MyResults Reports.**



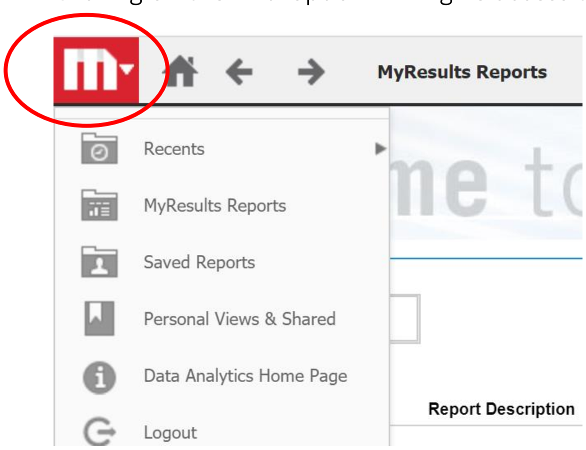
Navigation:

Once you have logged into MyResults you should not use the back-forward buttons, or any other menus found on your web browser. Instead, you should navigate back and forth between the pages using the Home icon and left/right arrows.

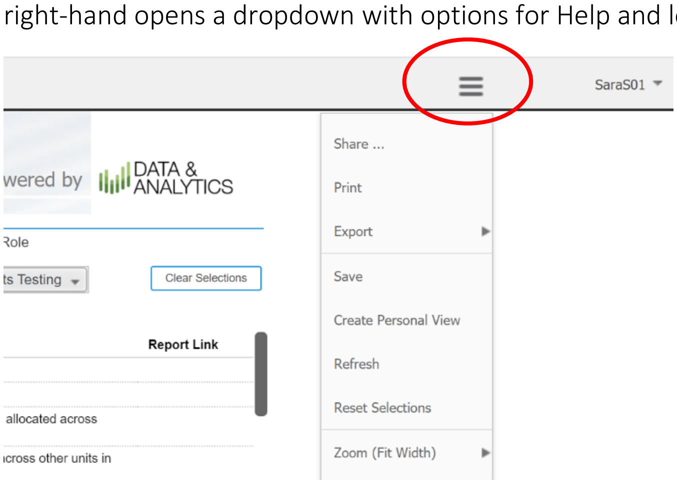
Clicking on the Home icon will take you back to the MyResults Welcome page. The right and left arrows can you be used to return to previous page or move forward.



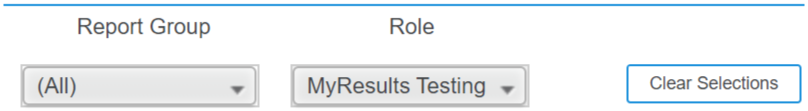
Clicking on the M dropdown will give access to recently accessed reports, saved reports and an option to logout.



Clicking on the three-line icon will open menu options similar to the M icon seen above; Clicking on the username in the right-hand opens a dropdown with options for Help and logging out.



The following options are available to filter between Report Groups and Roles; to go back to default selections, click the Clear Selections button.



All available reports are in a list along the left side of the screen; Use the scroll bar on the right side of the page to scroll through the list of available reports or a search bar is located above the list for convenient searching. To open a report, simply click the hyperlinked report name.

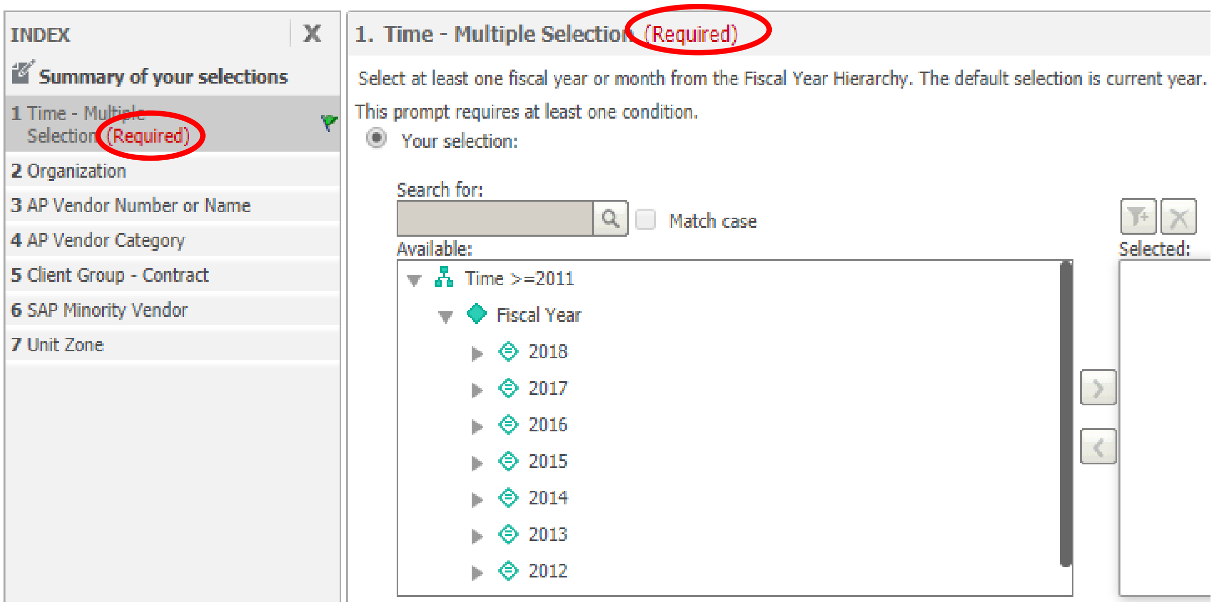
Lastly, MyResults Reports have Report Guides available for more information on a report and different functionality available within a report. The Report Guides are hyperlinked in the Report Link column.

Prompts & Selectors:

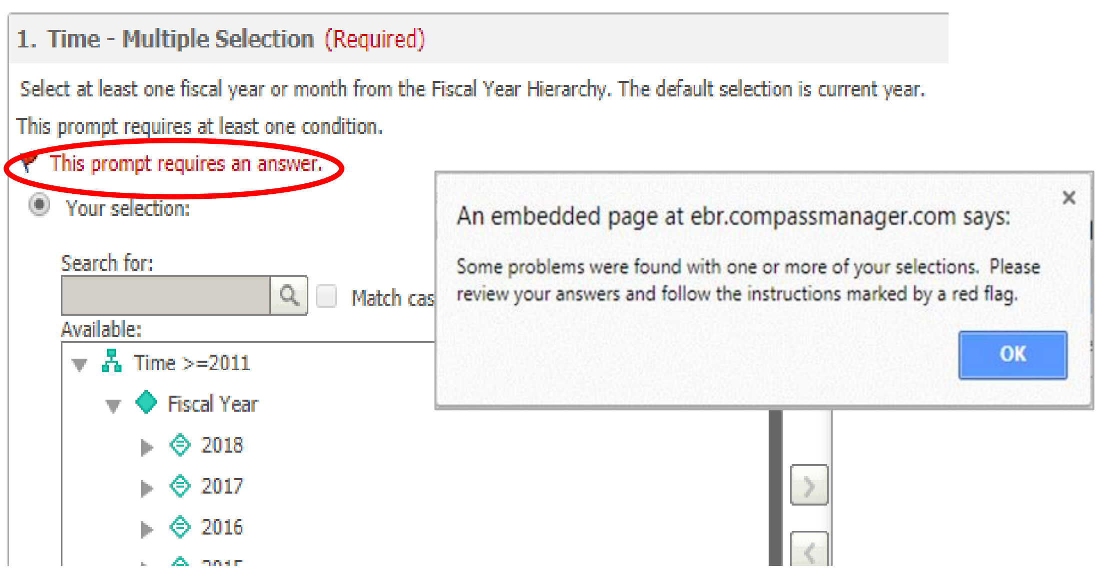
Prompts

Prompts offer alternatives for the user to select the data they want to see, *prior to actually executing the report.* Once you have selected your desired report, at times you will be prompted to define several report parameters. Each report will likely have a different set of prompts. Some of the prompts might be required in order to run the report, others optional.

If a report contains a required prompt (denoted in red), you must answer the prompt before you can execute the report. Also note that the panel on the left is a convenient summary of all of the prompts for this report.

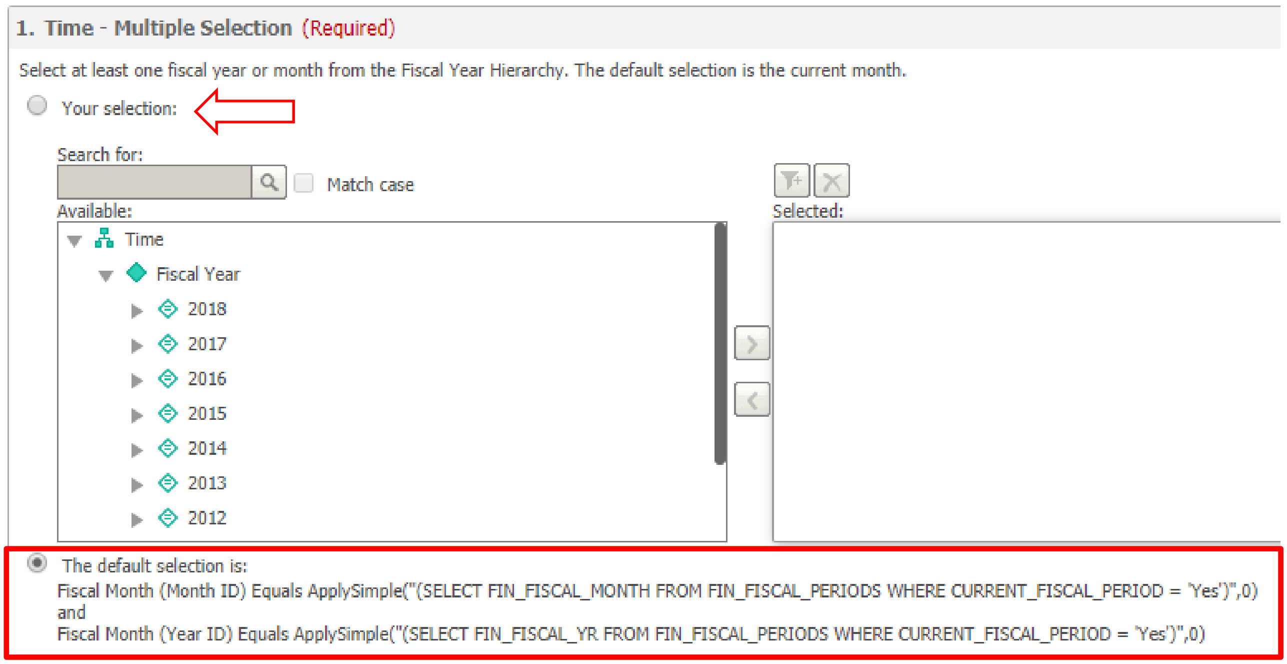


Failure to define a required prompt will typically produce the following warning message:



With some prompts, a value will automatically be defaulted. You have the ability to modify the default setting by selecting an option under "Your selection".

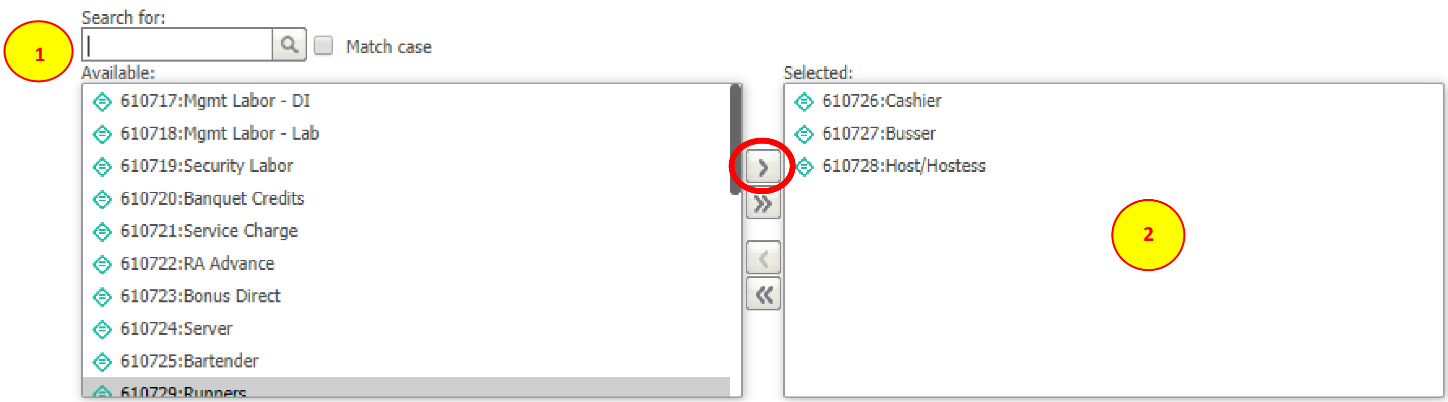
Note that next time you open the report, it will return to the default setting.



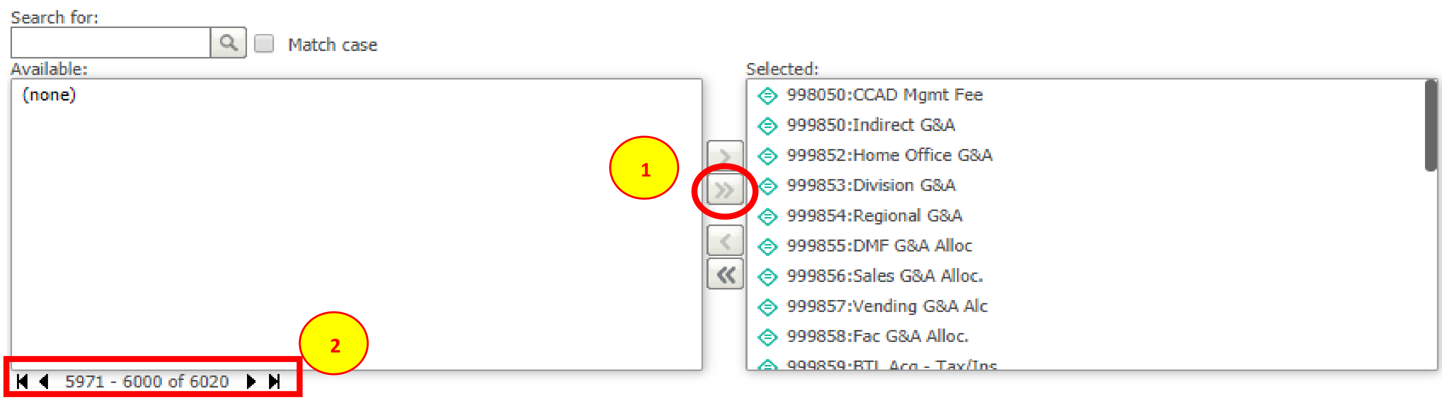
Following are a few examples of the more common types of prompts…

List box with Shopping Cart

This type of prompt involves selecting from a list of values in the **Available** box (left #1), and transferring them into the **Selected box** (right #2). The Selected box is also known as a **shopping cart**. The selection is highlighted in the available box, and the single arrow **Add** button (circled in red) is clicked to add to the shopping cart. What makes a list box prompt unique is that you can add *multiple variables* for one parameter. In the example below, five GL accounts have been selected for the parameter.

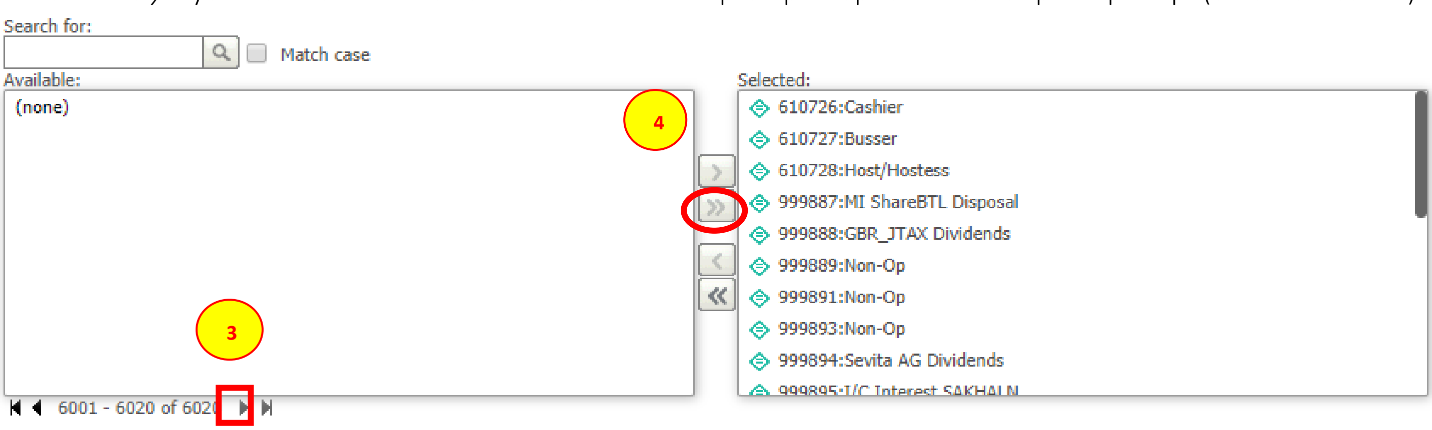


Be aware that if there are multiple pages of **Available** values in the left box, then the **Add All** button (circled in red) only adds all of the values of that ONE PAGE ('values 5971-6000 of 6020' see #2) . In the example below, all values 5971-6000 were successfully moved from the left box to the right box…

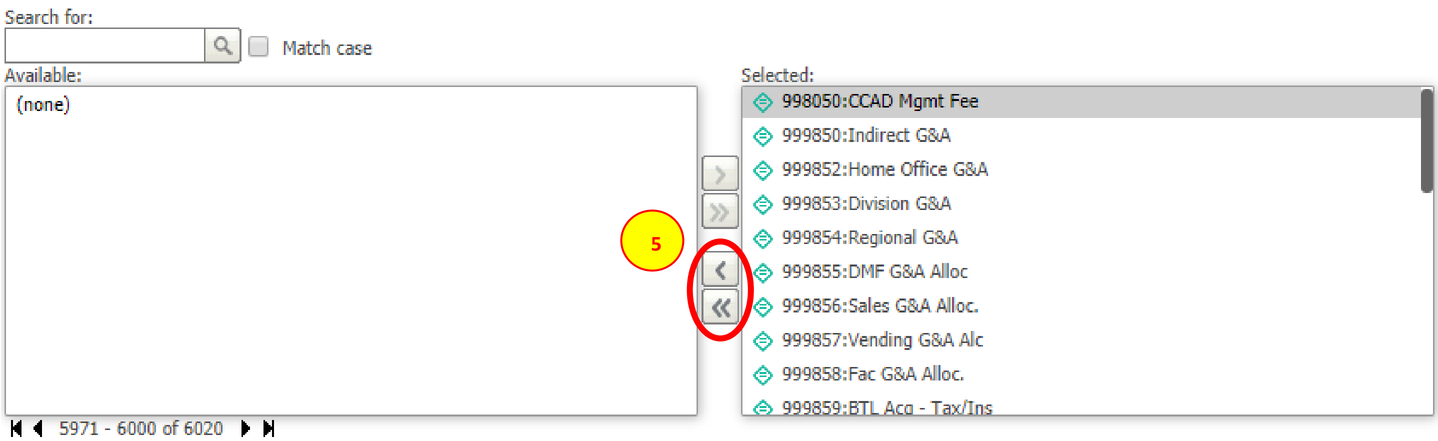


…however, if you wish to add values 6001-6020, it is necessary to go to the next page by clicking the right arrow (#3) and clicking the **Add All** button (#4) again to move values 6000-6021 into the right box.

**Alternatively* if you want to include all of the values and the prompt is optional then skip this prompt (or leave it as it is)*



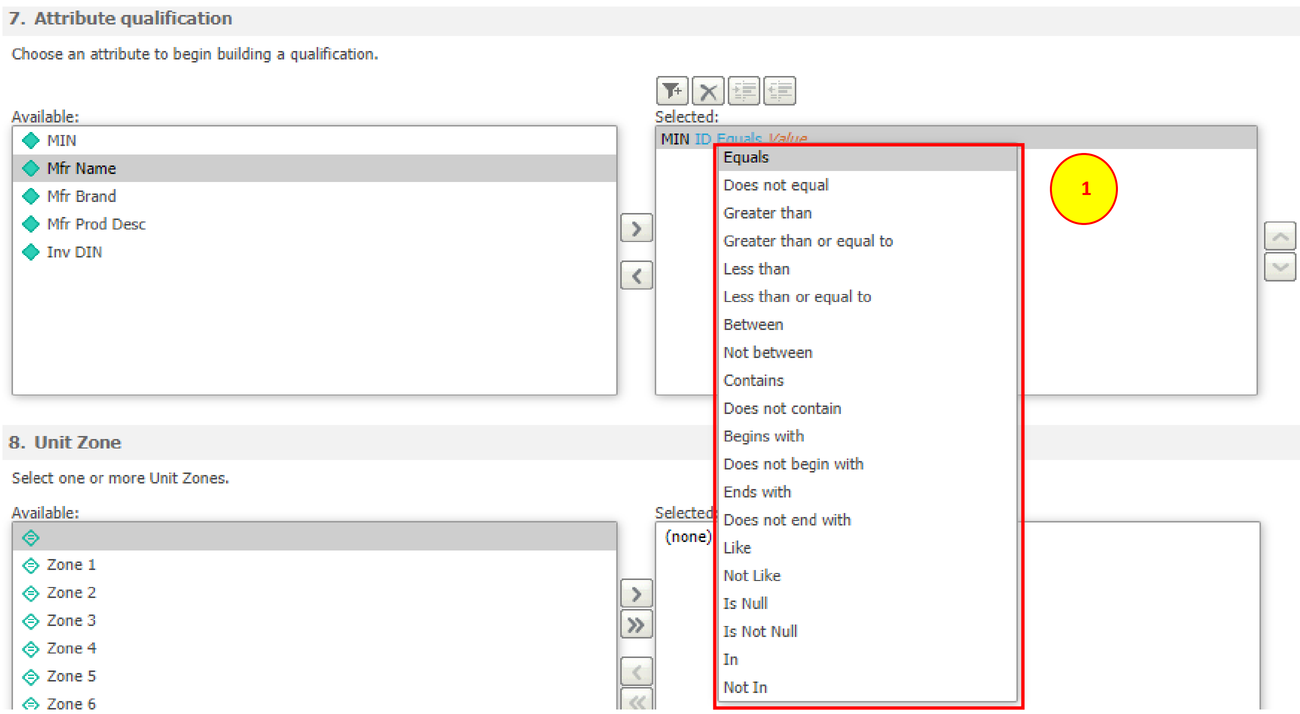
If you needed to remove an item(s) from the shopping cart, you would merely click on the reverse arrow button to remove one item or click on the double reverse arrows (#5) to remove *all* items from the shopping cart. In this case, clicking on the reverse double arrows just *once* would shift all of the items from the right box to the left box without requiring the user to go back to previous pages to remove items.

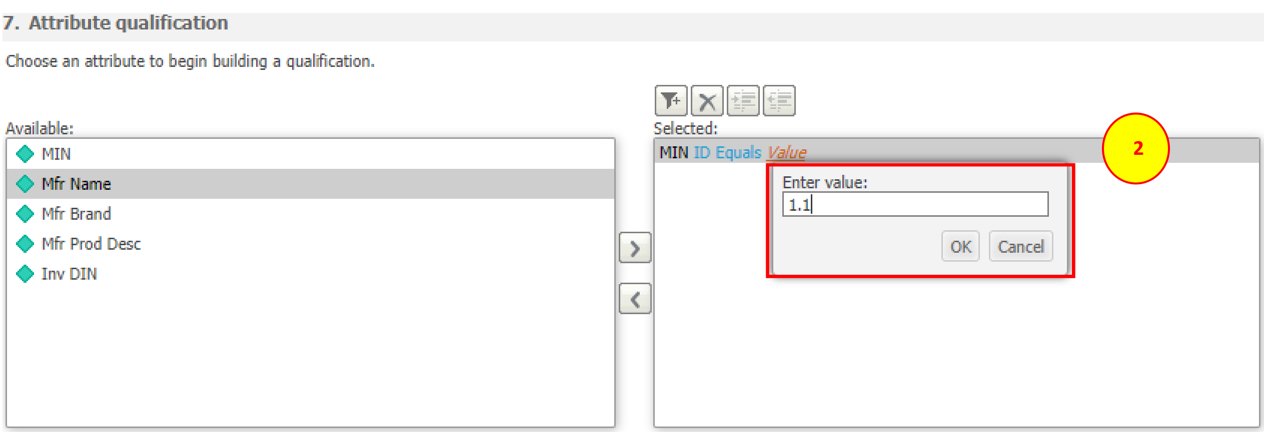


Attribute Qualification Shopping Cart

If you encounter the "Attribute Qualification" prompt in the Shopping Cart you have the ability to filter by a specific set of criteria via the **Attribute Qualification** prompt. Using one of the preset ranges as seen in Figure 1 (#1) allows you to restrict your results to only the data that conforms to the selected range. For example, the "In" function allows you to filter using multiple values by separating them with a comma, as opposed to manually adding them one at a time. Also, clicking on the value link allows you to specify for a particular criteria (#2).

Please note that this prompt is case sensitive and will not return any results unless the case matches exactly to what is contained within the report.

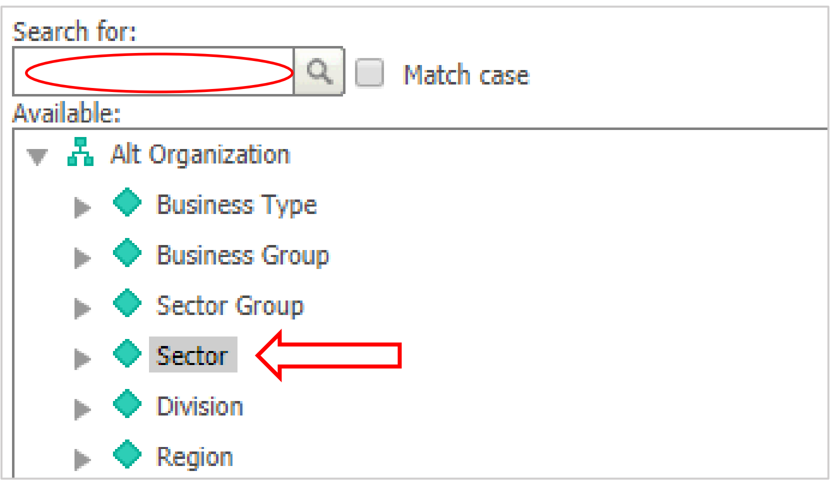




Hierarchy with shopping cart

Another type of prompt is the hierarchy prompt. As the name implies, hierarchies allow you to expand categories and reveal the sub-groups of that particular category. The '+' next to the box, indicates that there are sub-groups below it. Clicking the '+' will display these sub-groups. Conversely, clicking the '-'will collapse the category, so that none of its sub-groups are visible. You will only be able to see layers of the hierarchy that you have access to.

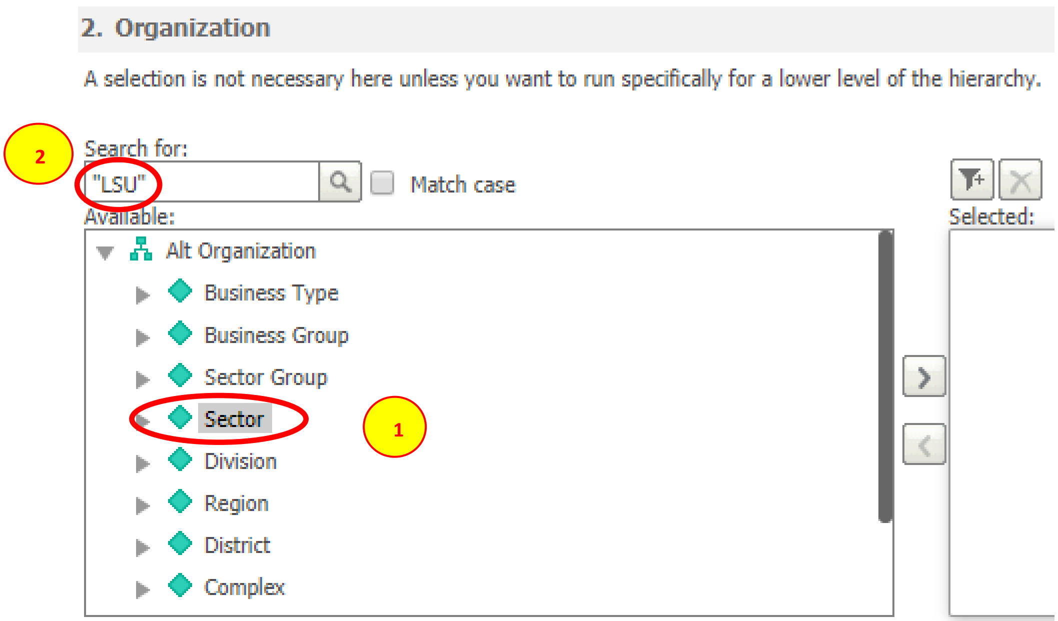
Also notice that when a hierarchy level (e.g. Sector) is highlighted, the search box is enabled. This allows you to search for a specific entity within the respective layer of hierarchy that you selected.



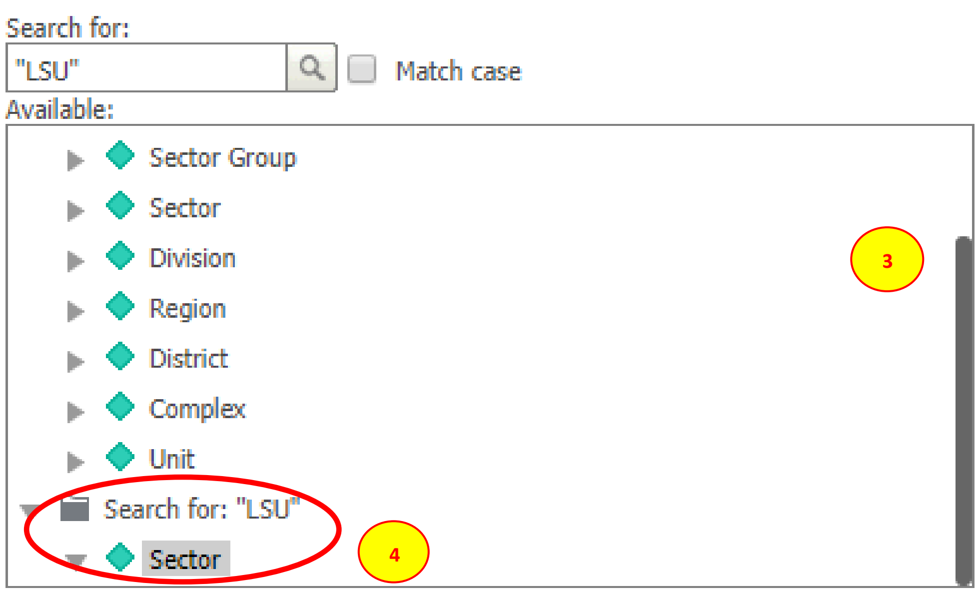
Conversely, the Search box is disabled when the teal and white box is highlighted. This is because the teal and white box is a specific value, and not a hierarchy grouping like the solid teal box.

It is important to understand how to search for a unit *within the appropriate hierarchy structure*.

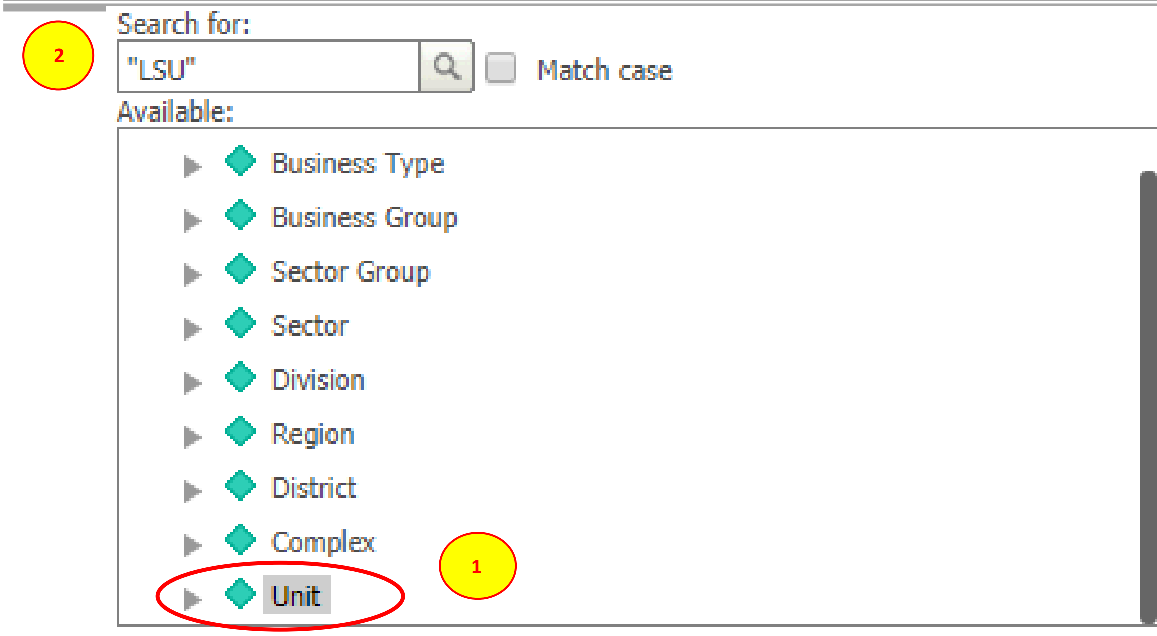
An example best illustrates this. Imagine we search for a **Compass Group Owned Unit** of “LSU”. We highlight the **Sector** (#1) rather than the **Unit** hierarchy. We then type in “LSU” (be sure to include the “ “) in the search box (#2) and press the magnifying glass to launch the search.



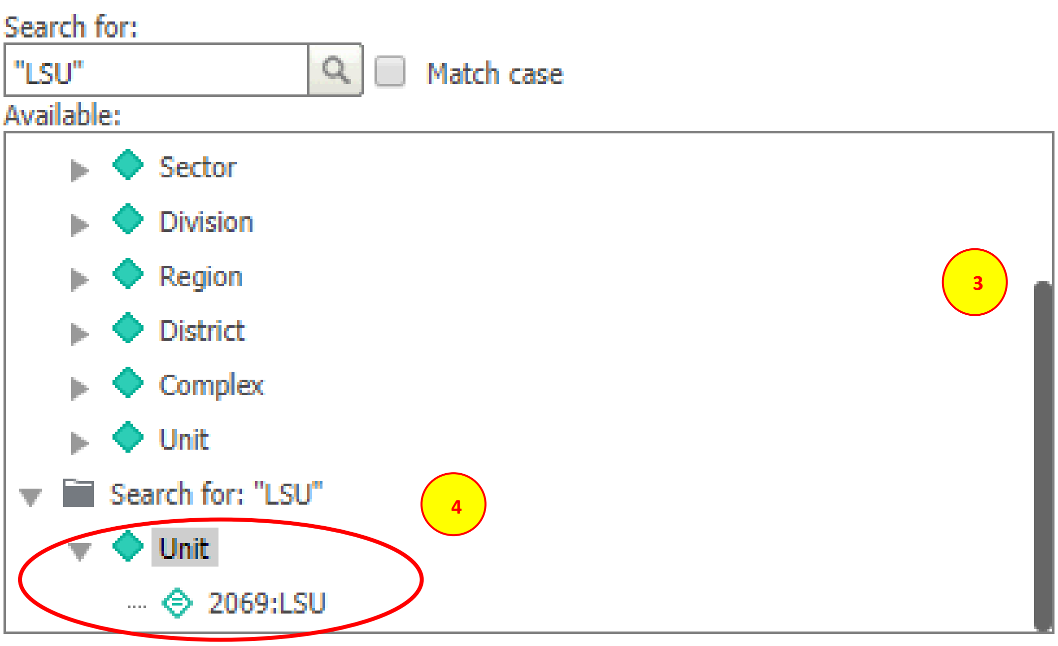
The search box is still enabled and it appears we are able to do a search, however the results (found on the bottom of the scroll bar #3) returns no sector by the name of “LSU” (#4).



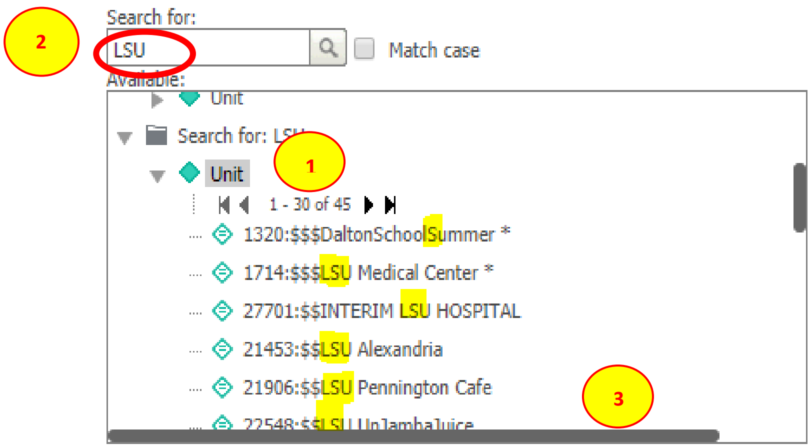
If we do a search at the correct hierarchy level by clicking on *UNIT* (#1) using the same example of “LSU” (#2)…



…then scroll to the bottom (#3) of the list box, we get the following result (#4).



It's also worth mentioning that searching for a name *or number* starting with and ending with " ", such as "LSU" would be searching for an ***exact name or number*** match. If you could not remember the exact name of the unit and were to search just as LSU (with no double quotes), you would get all of the units with LSU in their description. This is known as "fuzzy" search.



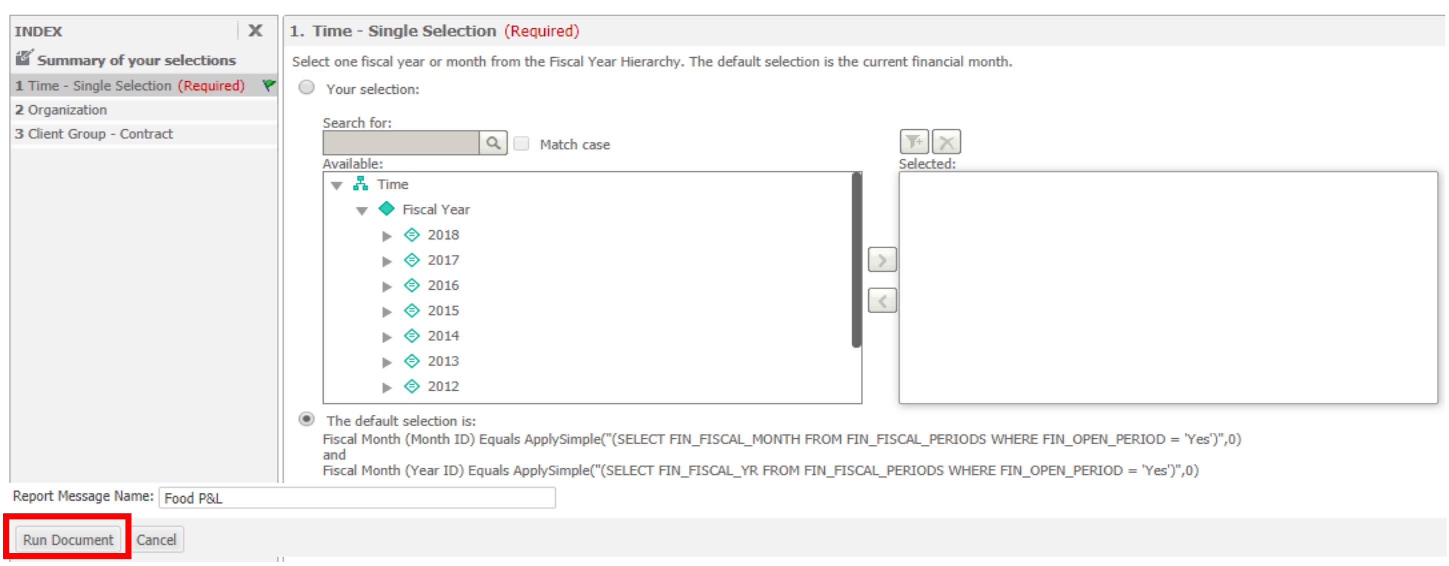
Checking the **Match case** box means that the letter case of the name must match or it will not return a match.

Example: checking the **Match case** and searching for lsu will return no matches. However un-checking the **Match case** and searching on lsu will return matches. The default setting for the **Match case** box is unchecked.

Once you've identified your unit, remember to click the single arrow to add to your shopping cart as outlined in the section above on List-Box with Shopping cart.

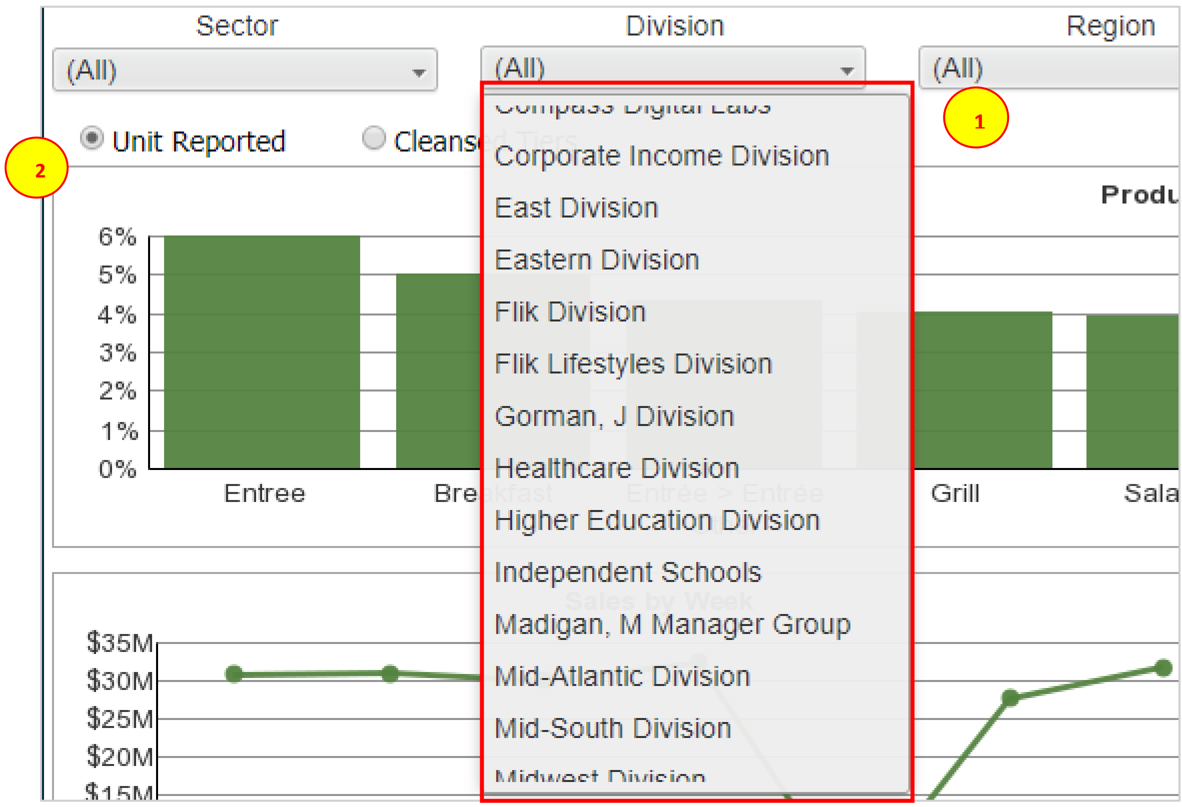
Note:	*You can refine your search using double quotes (" ") and/or wildcards (*)* *Examples:* • *"John Smith" = will return only exact matches* • *John Smith = will search for any results that contain John **OR** Smith* • *"*John* *Smith*" = will search for results that contain both John **AND** Smith*

Once all of the required prompts have been defined, you can run the report by clicking the **Run Report** button (or in some cases, **Run Document)** in the lower left hand corner of the screen.



Selectors

Selectors are alternatives that allow users to select or change the view of the report *within the actual report*. Reports make use of Selectors in the form of drop-down boxes (#1) & radio buttons (#2). Changing the selection of drop-down values and/or radio buttons will dynamically update the report or graph.



Report Functionality:

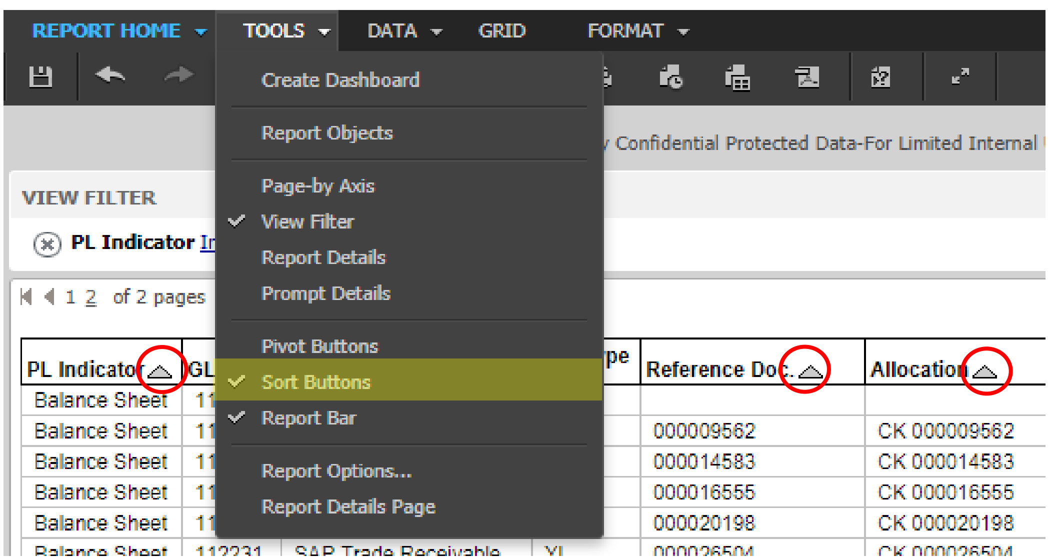
Reports sometimes return results that can span several pages. Be sure to check at the bottom of the report to see if this is the case (outlined in red). If this is the case, click on the arrows to navigate between pages.

20917	Univ Tx Dallas Pub	$13,343.03	0.00%	100.00%
20918	Steelton-Highspire*	$18,020.23	13.32%	99.84%
20932	Queens Univ	$108,478.01	0.00%	98.36%
20933	Queens Univ Cater	$558.29	0.00%	100.00%
21017	University of Mary	$31,214.98	0.91%	98.07%

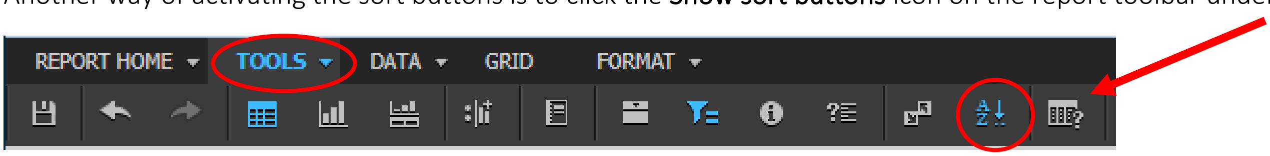
1 2 3 of 3 pages

Sorting

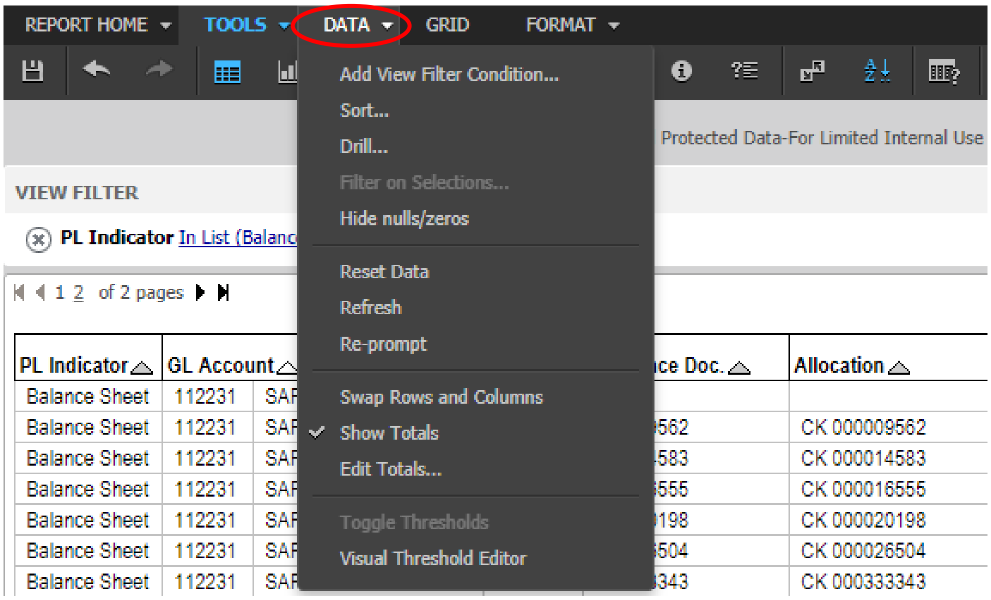
It is helpful to be able to sort data for easy reading. Click on the **Tools** tab and click on **Sort Buttons. This** will add the sorting functionality to your report columns with ▲▼ buttons.



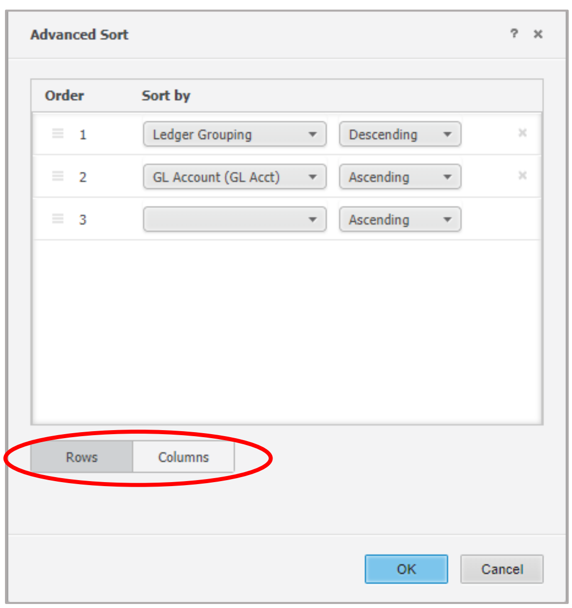
Another way of activating the sort buttons is to click the **Show sort buttons** icon on the report toolbar under the Tools tab:



If you want to sort on more than one column at a time, you can use the sort feature provided on the **Data** menu.



Upon selecting **Sort**, you will be prompted to define multiple sorts at once:



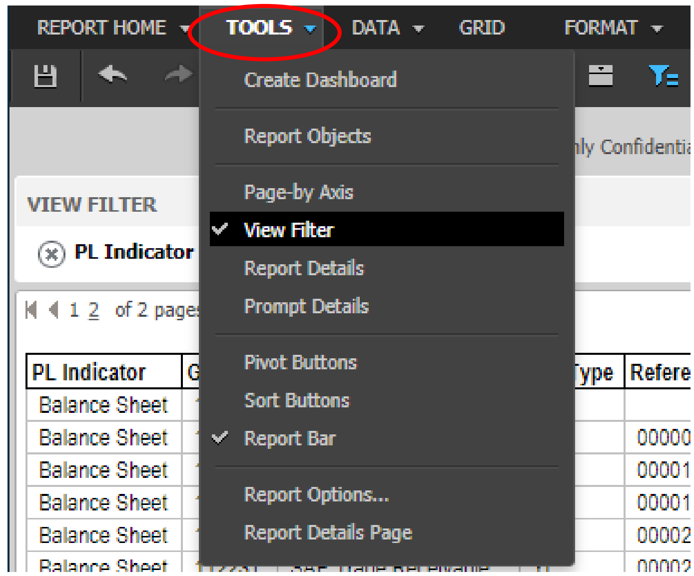
You can sort a row or a column by as many as three different fields in ascending or descending order.

Filtering

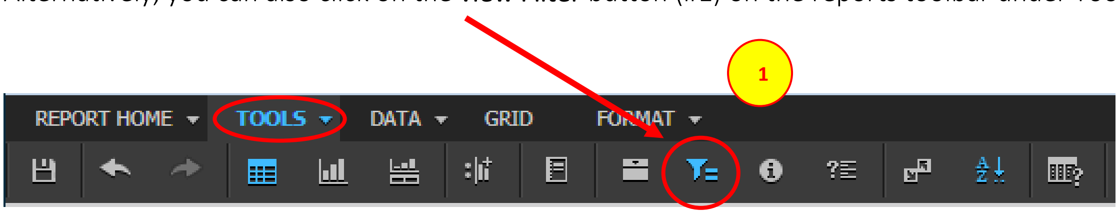
Filtering data on your report by adding condition(s) at the report level is a useful tool for analysis on the fly. However the prompts should be used as the *primary means of selecting data*. Filtering allows you to refine the results by only displaying data that meets certain condition(s).

Click on the **Tools** tab and click **View Filter.** This activates your filtering capability.

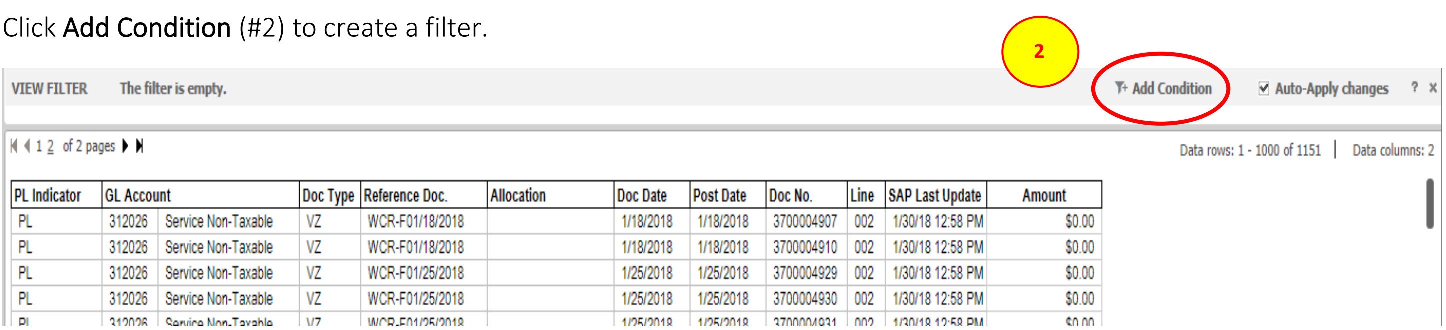
An easy way to confirm that your filtering functionality is turned on, is to click on the **Tools** tab again, and verify that there is a checkmark next to **View Filter.**



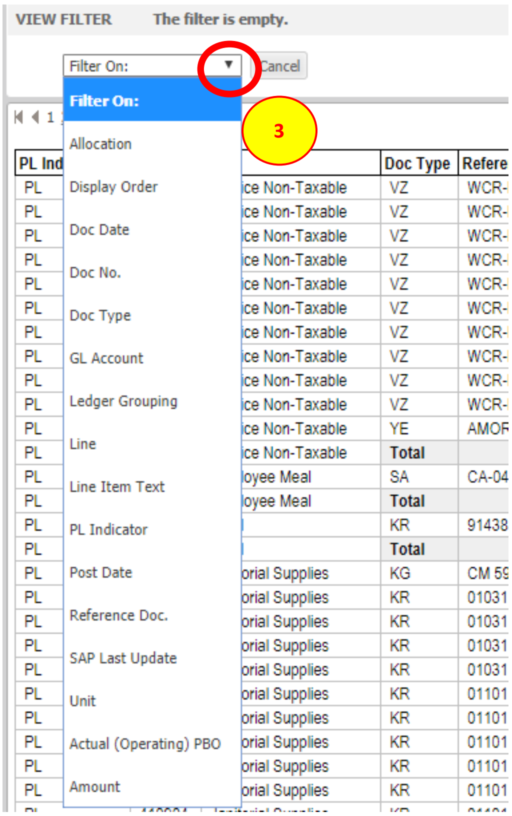
Alternatively, you can also click on the **view Filter** button (#1) on the reports toolbar under Tools tab to initiate filtering.



Click **Add Condition** (#2) to create a filter.



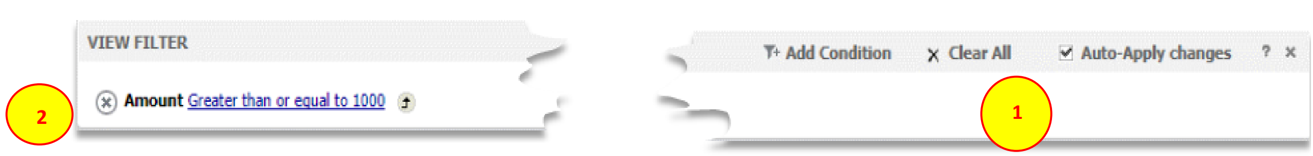
Clicking the **Add Condition** button will produce a drop-down list (#3) of pre-defined fields. Select the appropriate one.



In this example, we only want to show results with an amount greater than $1,000.00. (This number is a variable defined by the user.) Apply your condition by clicking the checkmark.

Also note that you can define a threshold in terms of another metric, by selecting the **Select Metric** button. For example: **Total AP Spend** *Greater or equal to* **Total PCard Spend**.

You can have multiple conditions for one filter. After completing your first condition, you can add additional conditions by clicking **Add Condition** and repeating the process as outlined above.



To remove all filters (#1), you click the **X** next to the **Clear All** verbiage.

To remove just one condition (#2), click the X next to the specific condition.

Drilling and Linking

Some line items on reports are underlined indicating that there is a hyperlink.

Clicking on the hyperlinks will essentially open a *new* report.

Profit and Loss Statement

SAP Last Update=4/16/18 7:20 AM

Fiscal Month=7:2018 Month=April

Complex=

Level 3

Unit =Total:Total:Total

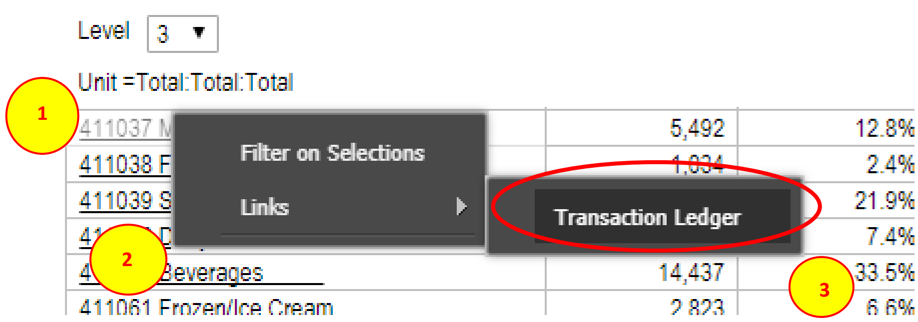
411037 Meat/Poultry	5,492	12.8%	0	0.0%	5,492
411038 Fish	1,034	2.4%	0	0.0%	1,034
411039 Storeroom	9,421	21.9%	0	0.0%	9,421
411048 Dairy	3,176	7.4%	0	0.0%	3,176
411054 Beverages	14,437	33.5%	0	0.0%	14,437
411061 Frozen/Ice Cream	2,823	6.6%	0	0.0%	2,823
411072 Bakery	1,743	4.0%	0	0.0%	1,743
411080 Prepared Foods	2,652	6.2%	0	0.0%	2,652
411085 Fresh Produce/Salad	1,531	3.6%	0	0.0%	1,531

In the previous example, if you click **Meat/Poultry,** you will see the following report:

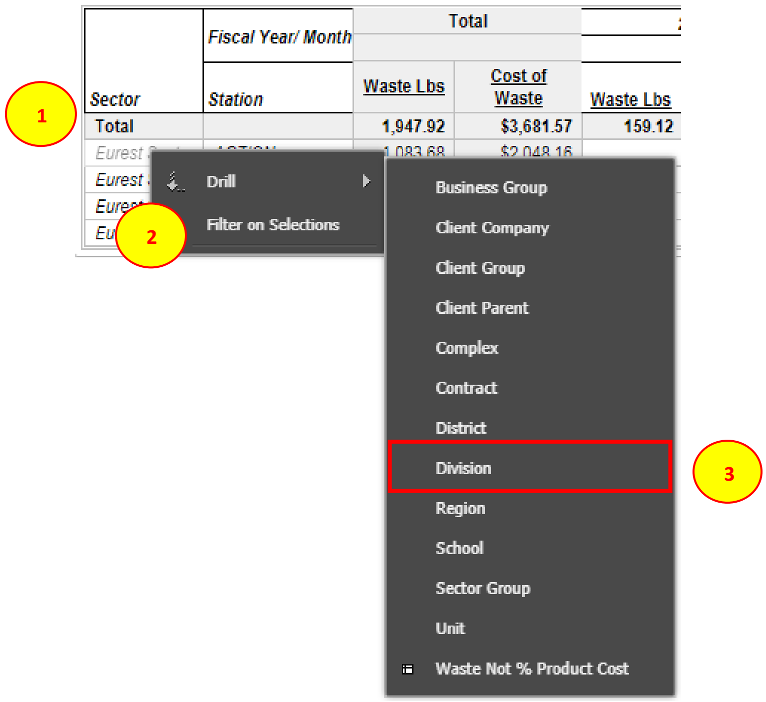
Food GL Hier Level Name	Food GL Acct Nbr		Doc Type	Line Item Text	Reference Doc.	Allocation	Doc Date	Post Date	Entr
Total									
411037 Meat/Poultry	411037	Meat/Poultry	**GL Account Total**						
411037 Meat/Poultry	411037	Meat/Poultry	KR	941518 - SYSCO FOOD SERVICE	148655064	-eVIA	3/30/2018	4/5/2018	4/5/
411037 Meat/Poultry	411037	Meat/Poultry	KR	941518 - SYSCO FOOD SERVICE	148659224	-eVIA	4/2/2018	4/5/2018	4/5/
411037 Meat/Poultry	411037	Meat/Poultry	KR	941518 - SYSCO FOOD SERVICE	148662866	-eVIA	4/4/2018	4/12/2018	4/12

Some hyperlinks may link to *multiple* reports. This is the case with many financial reports.
If you left-click on a hyperlink, it will open the first report available via links menu, without displaying the links menu.

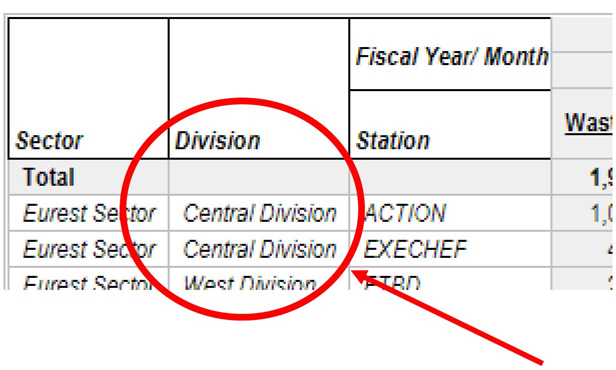
If you right-click on a hyperlink(#1), it will display the links menu(#2) which shows all reports that are available for you to link to (#3) for further detail.



ITALIC print always denotes that there is drill-down capability. Generally speaking, where ever there is a hierarchy attribute, there will be drill-down functionality. If you right-click on ***Eurest Sector*** (#1) and drill (#2) to the division level (#3)…



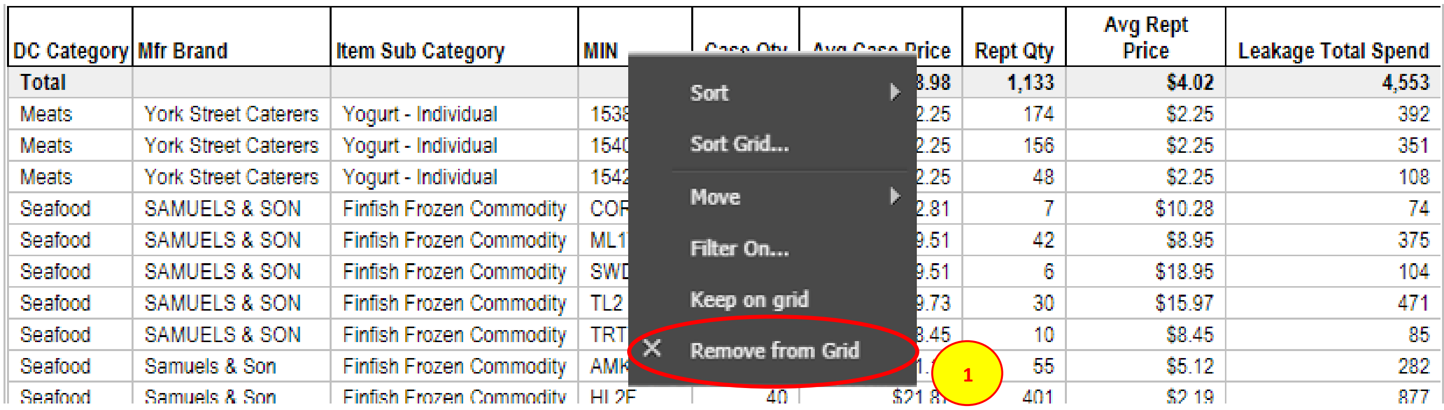
…you would see the following detail:



Advanced Functionalities:

There are additional **advanced functionalities** that allow you to further customize your view.

Right click on the column header and select **Remove from Grid** (#1).

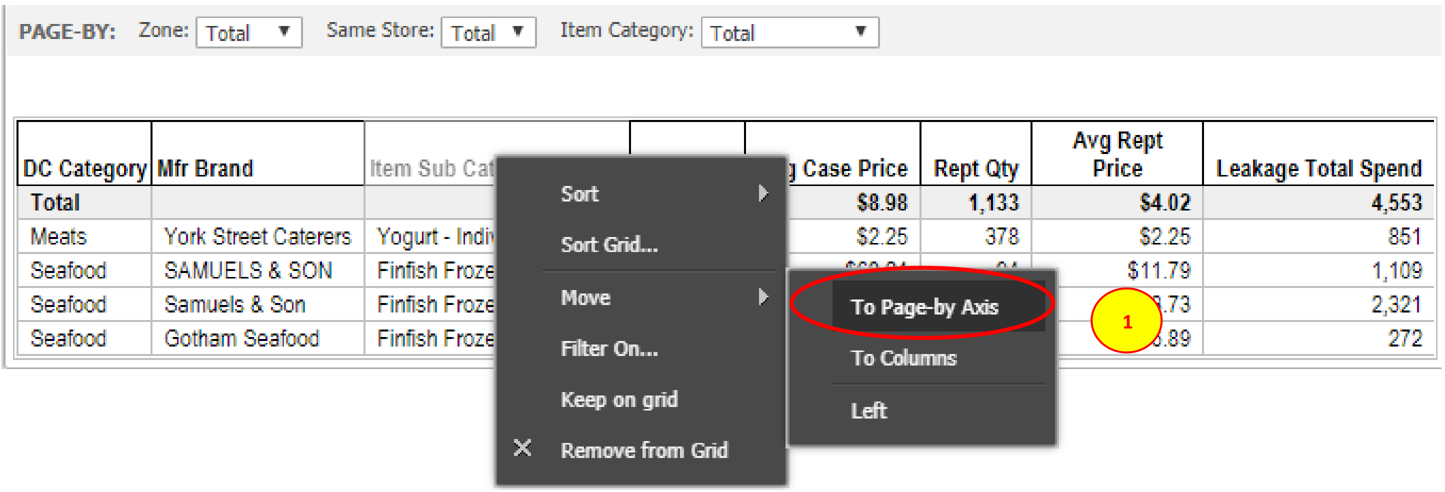


MIN field has been removed from the Grid and the totals have been aggregated.

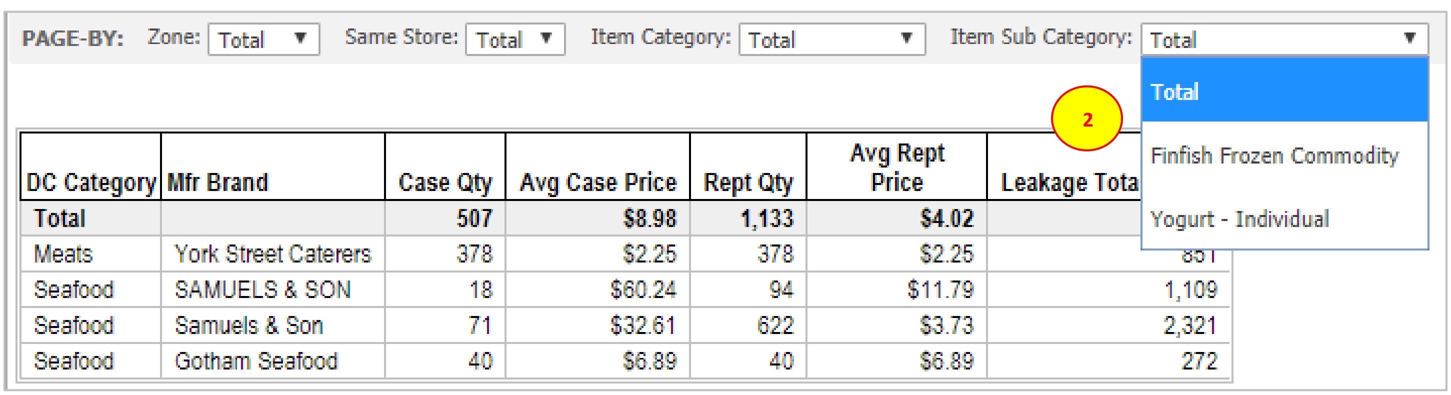
DC Category	Mfr Brand	Item Sub Category	Case Qty	Avg Case Price	Rept Qty	Avg Rept Price	Leakage Total Spend
Total			**507**	**$8.98**	**1,133**	**$4.02**	**4,553**
Meats	York Street Caterers	Yogurt - Individual	378	$2.25	378	$2.25	851
Seafood	SAMUELS & SON	Finfish Frozen Commodity	18	$60.24	94	$11.79	1,109
Seafood	Samuels & Son	Finfish Frozen Commodity	71	$32.61	622	$3.73	2,321
Seafood	Gotham Seafood	Finfish Frozen Commodity	40	$6.89	40	$6.89	272

Page by Axis

Right click on any column header and select **Move** and **then click on To Page-by Axis** (#1).

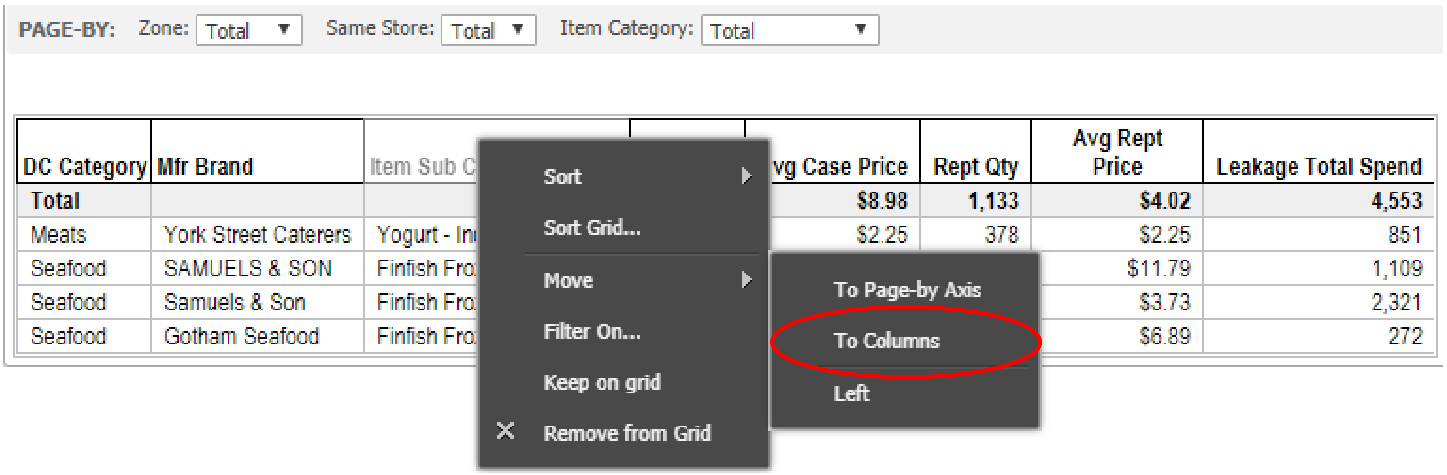


If you right-clicked on Item Sub Category, then you can see that it has moved to a drop-down menu next to the **Page-by** box (#2). The Item Sub Category field is no longer a column on the report.



Pivoting

Pivoting is the ability to change the position of columns and rows on your report. When you use the pivot function, you are essentially changing the report template or layout. Report data aggregates based on how the columns and rows are arranged.



Here we have moved Item Sub Category to Columns and now the report looks like this.

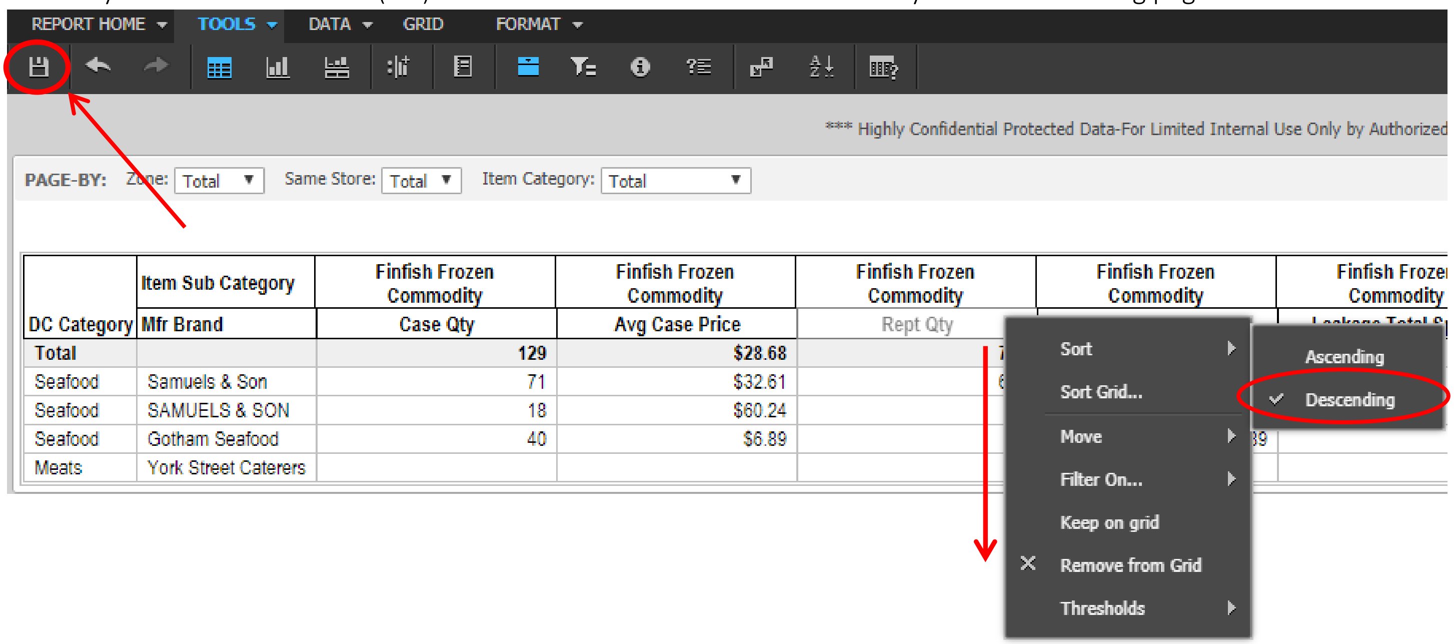
	Item Sub Category	Finfish Frozen Commodity	Finfish Frozen Commodity	Finfish Frozen Commodity	Finfish Frozen Commodity	Finfish Frozen Commodity	Yogurt - Individual	Yogurt Individu
DC Category	Mfr Brand	Case Qty	Avg Case Price	Rept Qty	Avg Rept Price	Leakage Total Spend	Case Qty	Avg Case
Total		**129**	**$28.68**	**755**	**$4.90**	**3,703**	**378**	
Meats	York Street Caterers						378	
Seafood	SAMUELS & SON	18	$60.24	94	$11.79	1,109		
Seafood	Samuels & Son	71	$32.61	622	$3.73	2,321		
Seafood	Gotham Seafood	40	$6.89	40	$6.89	272		

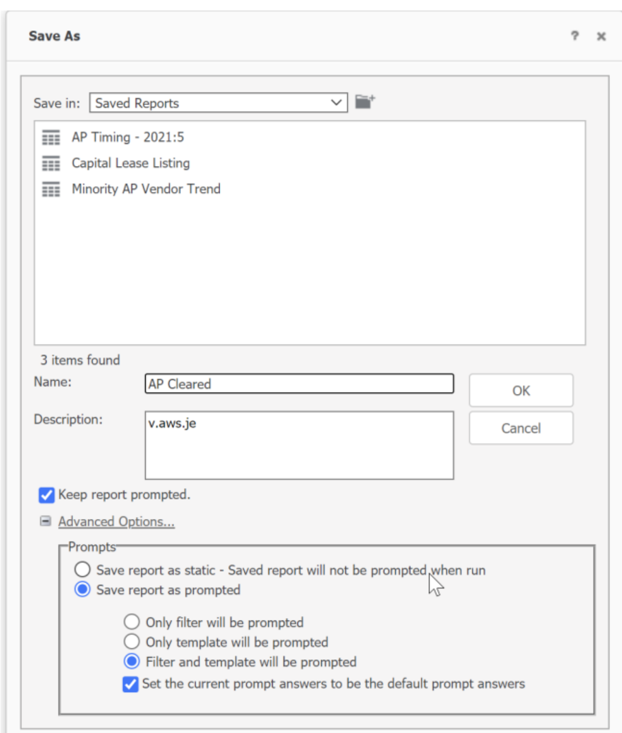
Saving a Personal View

Save As gives you the ability to store your prompt answers, filters, sorting, etc., under you own profile for easy access at a later date. Saved reports are only accessible via you and cannot be shared with additional users at this time.

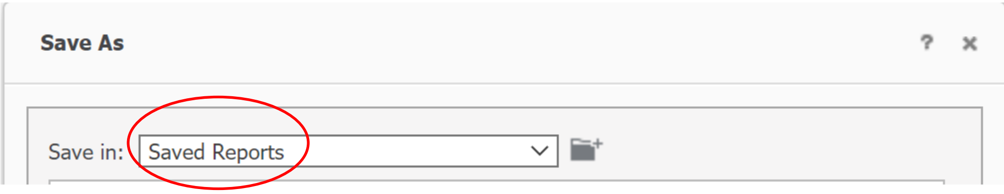
Select your desired report and run it. **Sort** and **Filter** the data for easy reading and analysis (please see **Sorting** and **Filtering** sections for additional information).

To save your **customized views** (# 2) click on **Save as** icon and it will take you to the following page.



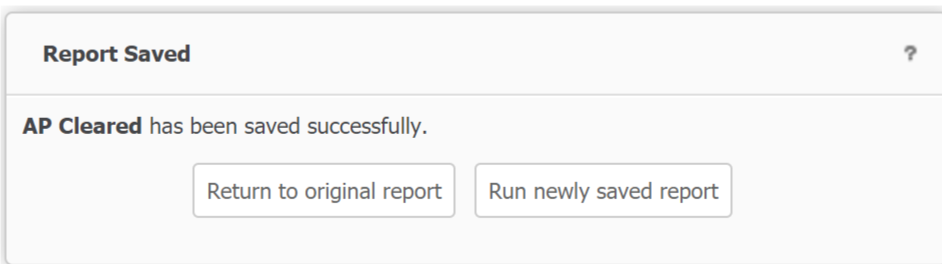


The report will be saved (by default) in the folder **Saved Reports**.

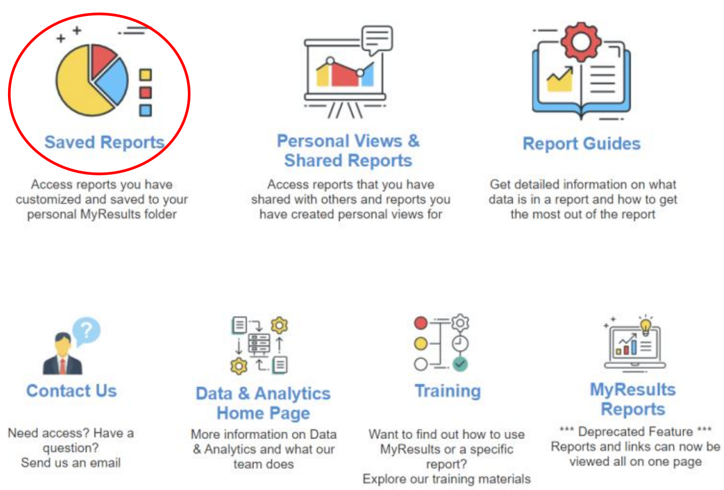


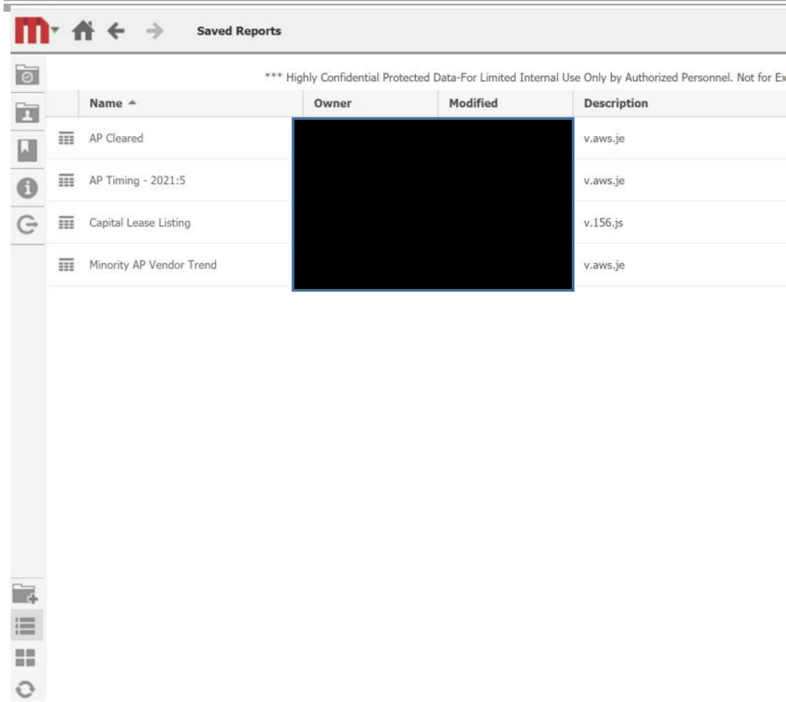
NOTE: As a best practice and easy identification, select a different name for the report when saving your customized version.

Click OK and you will see the following message, and you can select either option based on your preference.

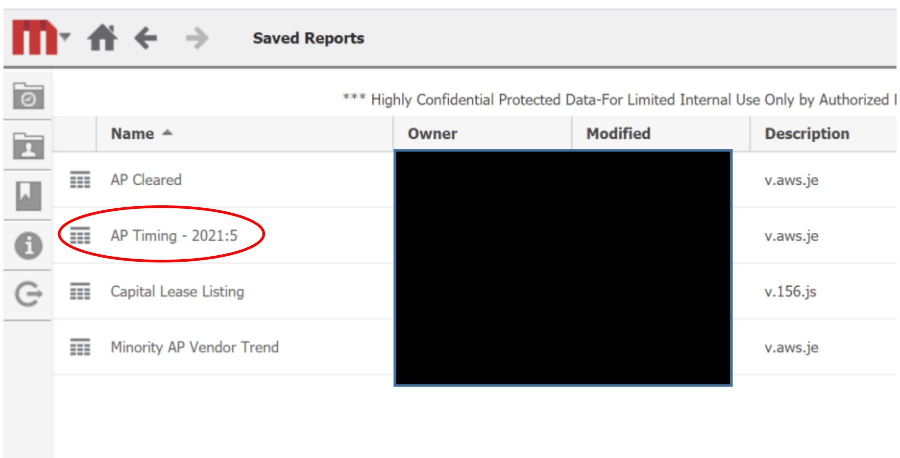


To access saved reports: click on the Saved Reports icon on the MyResults homepage.

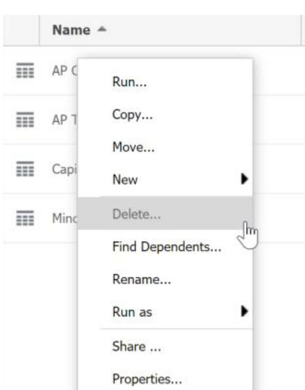




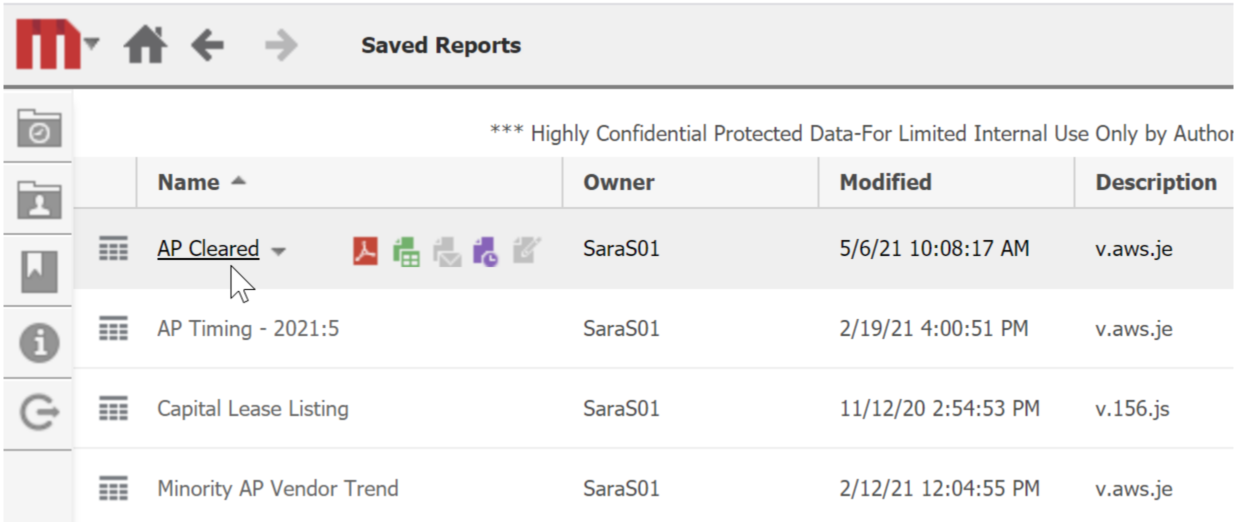
Just click on the report to run it.



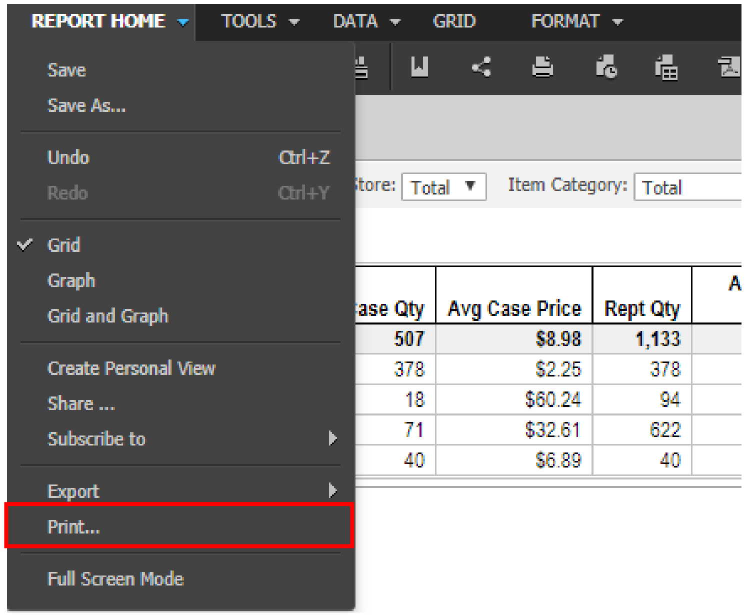
To delete a saved report: right click on the report name and select Delete.



Hover over a report to view options to open as PDF or Export.



Printing



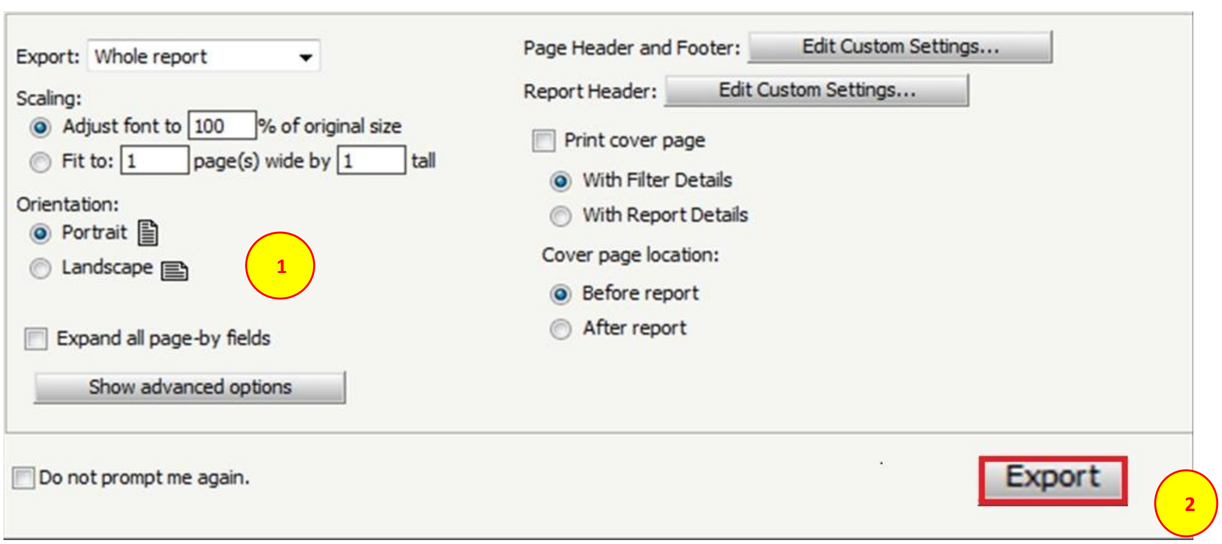
To print a report, use MyResults' **Print** buttons and *NOT* Internet Explorer's **Print** button.

There are two ways to print a report:

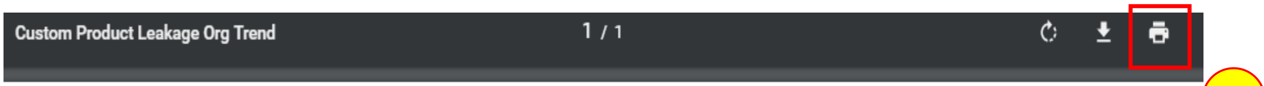
Click on the **Report Home** tab and select the print option on the menu…

…or select the **Print** icon to send the report to the printer.

Both options will produce the following screen. This would be where you specify your print parameters (portrait vs. landscape etc). If there are no changes, press the **Export** button to print.



This produces a PDF file in print-preview mode that you can either print or save to your computer as a PDF file. (These are also the instructions on exporting to a PDF file.)



*** Highly Confidential Protected Data - For Limited Internal Use Only by Authorized Personnel. Not for External Release, Review or Discussion with Unauthorized Personnel. ***

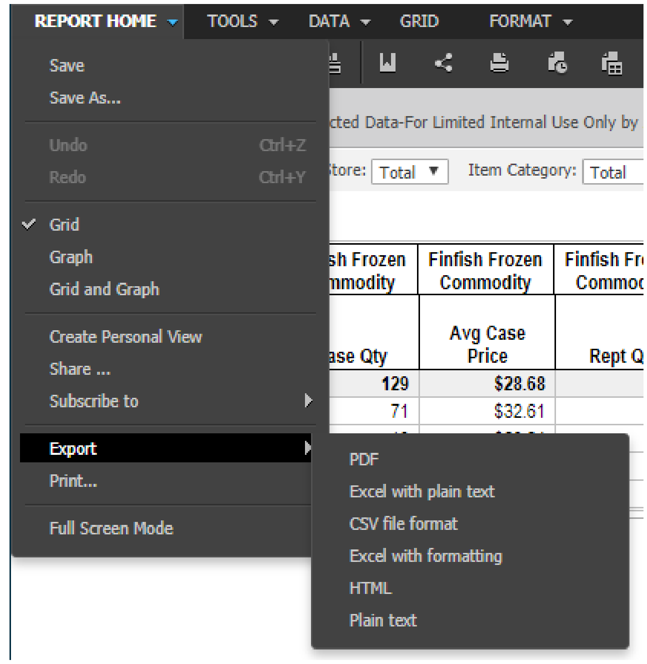
Custom Product Leakage Org Trend

Zone: Total, Same Store: Total, Item Category: Total

	Item Sub Category	Finfish Frozen Commodity	Finfish Frozen Commodity	Finfish Frozen Commodity	Finfish Frozen Commodity	Finfish Frozen Commodity	Yogurt - Individual	Yogurt - Individual	Yogurt - Individual	Yogurt - Individual	Yogurt - Individual
DC Category	Mfr Brand	Case Qty	Avg Case Price	Rept Qty	Avg Rept Price	Leakage Total Spend	Case Qty	Avg Case Price	Rept Qty	Avg Rept Price	Leakage Total Spend
Total		**129**	**$28.68**	**755**	**$4.90**	**3,703**	**378**	**$2.25**	**378**	**$2.25**	**851**
Seafood	Samuels & Son	71	$32.61	622	$3.73	2,321					

Exporting

As with printing, there are two different ways to export a report into another file format.



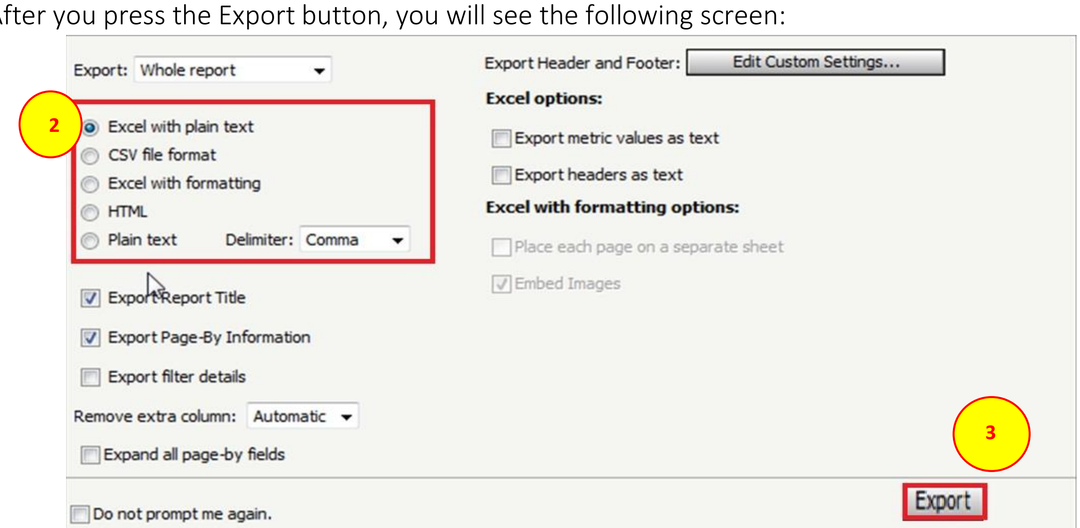
Click on the **Home** tab and select the **Export** option.

You can export the report to:

1. A PDF document (same process as printing a report, except you save as a PDF rather than print)
2. Excel with plain text (a spreadsheet with no formatting)
3. CSV file format (Comma separated value format – another form of text format)
4. Excel with formatting (a spreadsheet that has the same formatting that is present in your report.)
5. HTML (a format for web publishing)
6. Plain Text

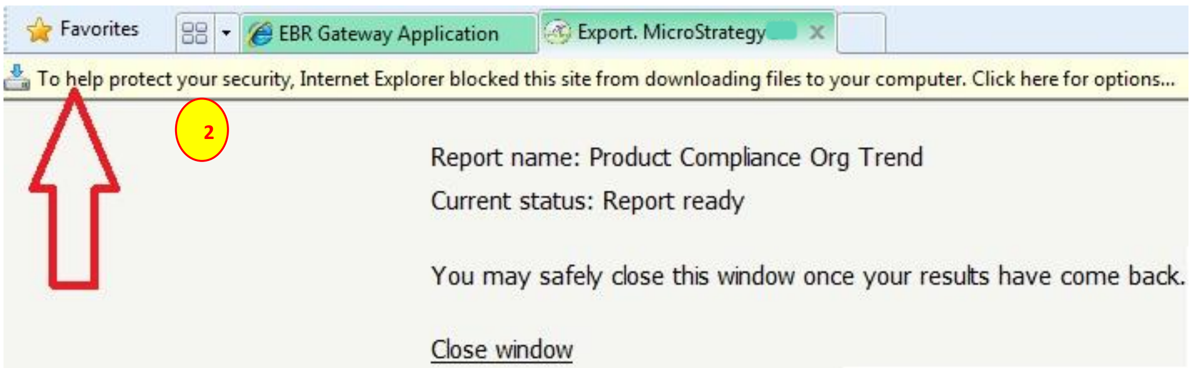
Alternatively, you can choose to export using the toolbar. To export into a PDF format click the **PDF** icon (outlined in red circle). If you prefer to export to Excel, CSV, text or HTML format click the **Export** icon (outlined in red rectangle).

After you press the Export button, you will see the following screen:



Outlined in the red box are all the different formats you can export to. Excel with plain text is ideal if exporting a large amount of data. After you have selected a format, press the **Export** button.

Note: if it's your first time exporting a file from MyResults, you might get the following message:



...if that is the case, left-click on the yellow banded message and select **Download File** and the export process will resume.

Tip: When the export limit for Microstrategy has been reached, you will need to complete one of the following below for proper export:

- Refine the prompt criteria when running the report
- Narrow export results by removing columns. You can remove columns by right mouse click on the header and select "Remove from Grid".

Export to .csv instead. This option allows you to export more data, but you will have to convert to columns.

Icons on the Toolbars

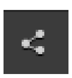
Report Home Toolbar: This is the **Save As** button that enables you to save customized changes and prompt selections made to a report.

Report Home Toolbar: This is the **Undo** and **Redo** buttons to reverse or re-apply previous actions.

Report Home Toolbar: The **Grid** button displays the report results in a grid format similar to a spreadsheet (which is the default format).

Report Home Toolbar: The **Graph** button displays the report results in a graph format. A graph report is a representation of data in a visual format that can help you see overall trends easily, identify medians and exceptions, and so on.

Report Home Toolbar: The **Grid and Graph** button displays the report results in both graph and grid format.

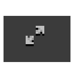


Report Home Toolbar: The **Share…** button allows you to share the

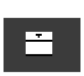
Report Home Toolbar: Pressing the **Print** button launches the print parameters dialogue box of the report (portrait vs. landscape). Press '**Export'** to print-preview report.

Report Home Toolbar: Pressing the **Export** button will prompt the user to choose the export format of his choice. (Excel with plain text, CSV file format, Excel with formatting, HTML & Plain text)

Report Home Toolbar: Pressing the **PDF** button launches the print parameters dialogue box of the PDF report (portrait vs. landscape). Press '**Export'** to print-preview PDF report.



Report Home Toolbar: You can view a dashboard or document without the toolbars, menus, and panels at the top of the screen. By hiding these tools, you can focus attention on the data itself and maximize the amount of the document that can be shown at one time. This is called **Full Screen mode**.
Report Toolbar-full screen mode: Click this button to restore the original and default screen mode.



Tools Toolbar: The **Page-by Axis** button allows you to work with that data by grouping it into logical subsets, and viewing only one of the subsets at a time. To group data into subsets, you can use the 'page-by feature'. The subsets you separate your business data into are called pages, and you then page your way through the report, one data subset at a time.

Tools Toolbar: The **View Filter** button, displays the view filter menu bar and any filters being applied to the report. Clicking the button again will hide the view filter menu bar, without clearing any filters.

Tools Toolbar: The **Report Details** button displays all report parameters and applied filters to the report.

Tools Toolbar: The **Prompt Details** button shows what values were used as the Prompt variables.

Tools Toolbar: You can move an object (metric, attribute, consolidation, or custom group) on a report to change the report's layout. This is also known as data pivoting. You can also swap all rows and columns on a report with a single click of the **Show Pivot Buttons**.

- Move to the left
- Move to the right
- Move to columns moves row headers to column headers in a new row.
- Move up
- Move down
- Move to rows moves column headers to row headers in a new column.
- Page-by this field moves the object to the Page-by axis.
- Move to columns (down) moves the object out of the Page-by axis into the columns of the report.

To restore to the original report format, close and re-run the report. To remove these icons from the headers altogether, click the **Show Pivots Button** again.

Report Toolbar-Tools tab: The **Show Sort Buttons** enables the sorting buttons on the grid. Use the sort buttons located within each column or row header as described below. If the sort buttons are not displayed, from the Tools menu, select Sort Buttons.

- A gray arrow at the top of a column or row indicates that the data in the column or row is unsorted.
  - If the gray arrow is pointing up , click it to sort the data in that column or row in ascending order.
  - If the gray arrow is pointing down , click it to sort the data in that column or row in descending order.
- A white arrow at the top of a column or row indicates that the data in the column or row is already sorted.
  - If the white arrow is pointing up , the data is already sorted in ascending order. Click it to resort in descending order.
  - If the white arrow is pointing down , the data is already sorted in descending order. Click it to resort the data in ascending order.

Tools Toolbar: The **Report Options** button allows you to adjust several aspects of a grid report, i.e. merging and locking column/row headers, applying banding, etc…

Data Toolbar: The **Drill** button will show all 'drillable' fields on the report and allow you to drill based on these fields. Note you also have the option of keeping the parent visible while drilling by clicking the 'Keep parent while drilling' option.
This is an alternate way of drilling as opposed to clicking on *italicized* print or clicking on the '+' sign to drill for additional detail.

Data Toolbar: the **Refresh** button essentially 'refreshes' the report by re-running the report and overriding any previously cached version of the same report.

Data Toolbar: The **Re-prompt** button will take you back to the report's original prompts screen.

Data Toolbar: the **Swap Rows and Columns** button turns the rows into columns and the columns in rows. Clicking it again will restore its orginal configuration.

Data Toolbar: The **Show Totals** button displays or hides report totals.

(Custom)

Grid Toolbar: The 'custom' drop-down allows you to select from different report styles available to you (example: 'balance sheet' or 'colorful'). For consistency, we recommend that you *not* select a customized format style and keep the default format setting.

Grid Toolbar: The **Banding** button enables you to apply background colors to alternating rows on a grid report. This is called banding. Banding helps you view the data on a report more easily. To remove, click on the **Banding** icon again.

Grid Toolbar: With the **Outline** mode, you can create an indented grouping of related data on a grid report by organizing the data into a standard outline style. An outline lets you collapse and expand sections of related data. To remove, click on the **Outline** icon again.

Grid Toolbar: The **Merge Column Headers** will allow you to merge any column headers that are repeated. To remove, click on the **Merge Column Headers** icon again.

Grid Toolbar: The **Merge Row Headers** will allow you to merge any row headers that are repeated. To remove, click on the **Merge Column Headers** icon again.

Grid Toolbar: The **Lock Row Headers** button will keep the row headers visible at all times as you continue to scroll from left to right through your report. To remove, click on the **Lock Row Headers** icon again.

Grid Toolbar: The **Lock Column Headers** button will keep the column headers visible at all times as you continue to scroll from top to bottom through your report. To remove, click on the **Lock Column Headers** icon again.

Grid Toolbar: The **Auto Fit to Contents** button will auto-size the width of the columns based on the data. All extra space in the grid is removed.

Grid Toolbar: The **Auto Fit to Window** button will stretch the width of the columns to fit the size of the browser window.

Document Toolbar: the **View Mode** button displays the document results only as you might see in a static PDF file. You cannot change the document or manipulate the data.

Document Toolbar: the **Interactive Mode** button allows you work with the data on a grid or graph report in a document. You can use the the selectors to flip through the panels in a panel stack, format grid/graphs, sort grid reports and pivot report objects on them, add totals, or resize rows and columns.

Document Toolbar: Allows you to access features provided by **Flash**, such as interactive widgets. You cannot manipulate or format grid or graph reports in a document, except to sort and pivot objects on them. If a graph report uses a graph type that is not supported in Flash, the graph is not displayed.

Document Toolbar: Allows you to adjust the size of document viewed.

Document Toolbar: Allows you to adjust the size, orientation, and margins of the document.