

Foundational Training

March, 2016

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Table of Contents

Table of Contents	3
Learning Goals - Section 1	4
Learning Goals	4
Financial Dimensions	6
Financial Dimensions	6
Summary	7
Budget Entity	8
Adding a Budget Entity	8
Summary	10
Scenario	11
Create Budget Type Scenario	11
Summary	13
Templates	14
Add an OpEx Budget Template	14
Design OpEx Template Rows	18
Template Mapping	22
Access Budget Template From Control Panel	25
Learning Goals - Section 2	28
Learning Goals	28
Loading Data	30
Load Income Statement Data with a Data Load Rule (DLR)	30
Actual Data Load Months & Process Cube Partition	36
Reporting	39
Create a Dimension-Based Dynamic Report	39
Report Security	42
Use Case	44
Create an ad hoc report	44
Summary	45

Learning Goals - Section 1

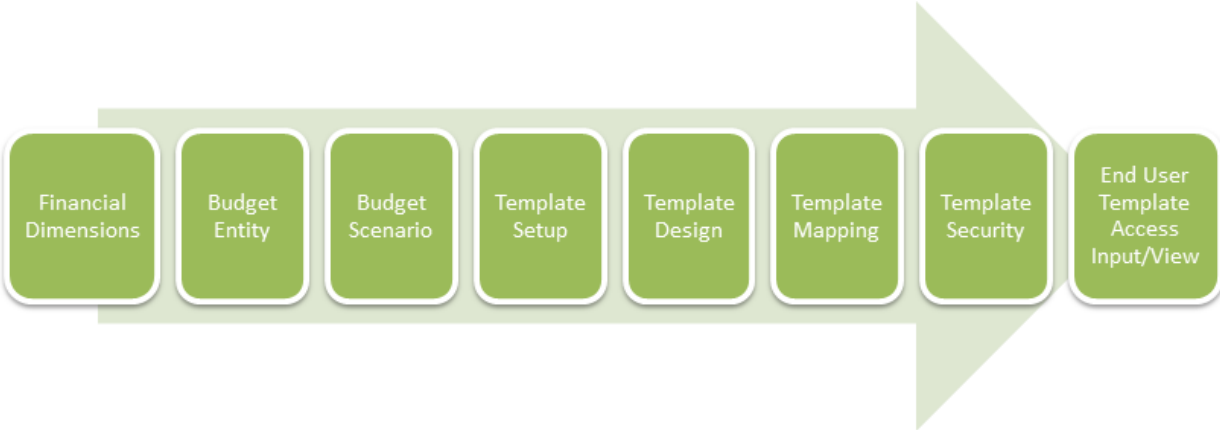
Learning Goals

At the completion of today's training session, you will be able to:

1. Identify and use **Financial Dimensions** for planning
2. Create and apply a **Budget Entity** for user access
3. Design a Budget **Scenario** that will be used as a placeholder to store budget data
4. Set up a template and the necessary parameters specific to your planning needs
5. Design a template that will include mapped rows, calculations and formatting
6. Enable the template in the appropriate **Budget Entity** and Scenario so users can access them for planning
7. Assign the associated approval role to the appropriate users that will need to access the template
8. Access the completely designed template in the **Budget Control Panel** that will be used to input all data

Users access, view and input data to specifically designed templates that fit their needs. Administrators are responsible to set up **Financial Dimensions** which can be used in templates and reports. **Budget Entities** define the level at which data is entered into the template. Create a budget or forecast **Scenario** to use as a placeholder to store data. Set up the best template parameters for ease of use. **Design Templates** that could incorporate accounts, calculations and formatting. Provide approval role and template security to potential users to access the finalized template through the **Budget Control Panel**.

The following diagram establishes the process flow that is essential to completing and accessing a template.



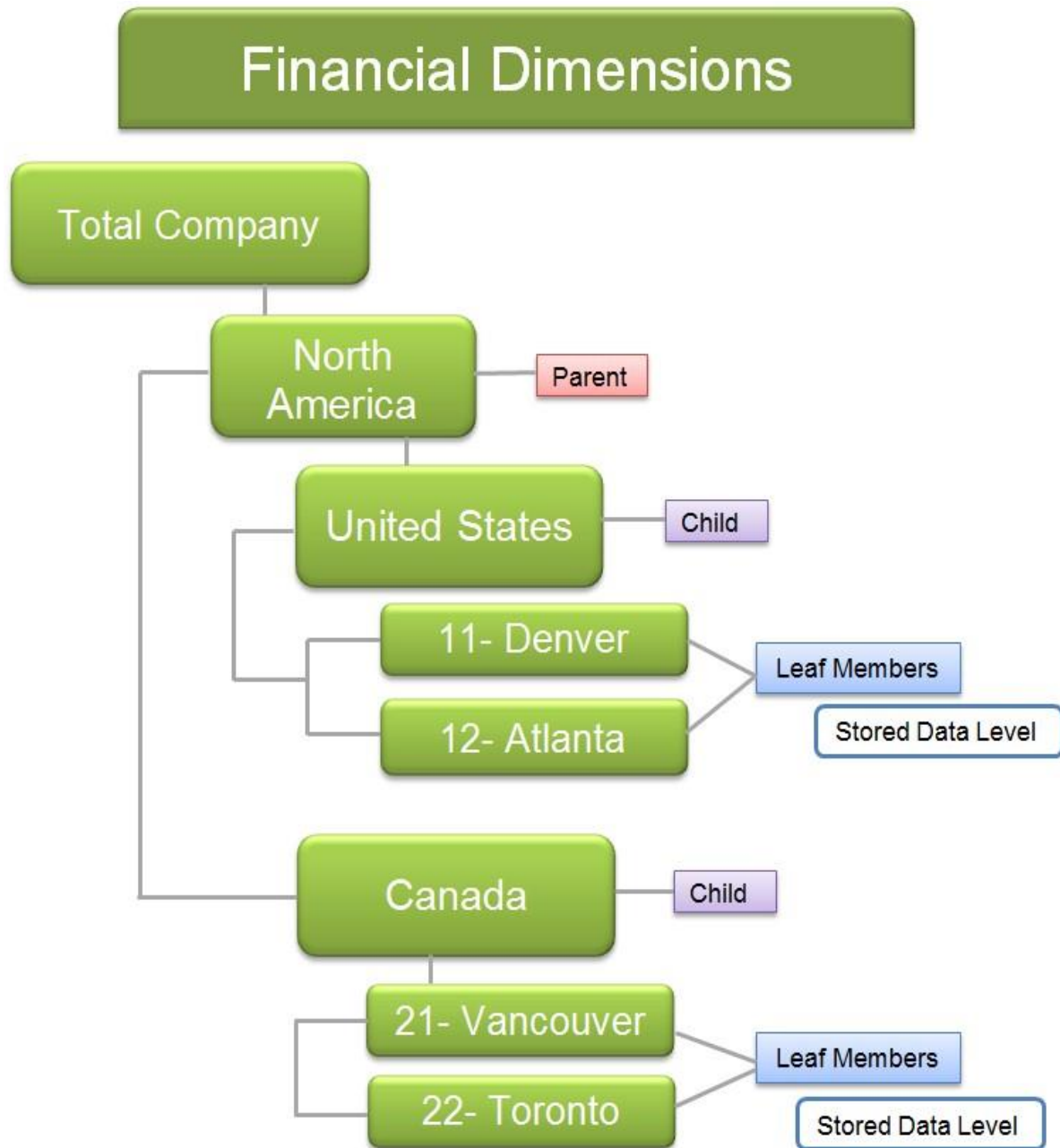
Financial Dimensions

Financial Dimensions

Dimensions are the foundation of the application. They are the framework around building reports and planning templates. A maximum of 8 financial dimensions may be defined of which 2 are required: **Account** and **Legal Entity** or more commonly known as **Company**. If you are performing consolidations, an intercompany segment may be required.

A strong foundation of dimensions drives consistency of reported information across the business units. It allows features to be shared across all business entities such as budgeting, consolidation, and dashboards. The dimensions typically align with the organizations general ledger or ERP structure.

For more information about Financial Dimensions, review dimension structure and sample tree level load documentation located in the **EPM Academy** Foundations course reference material tab.



Summary

Dimensions provide the infrastructure to your Host Analytics application.

Budget Entity

Adding a Budget Entity

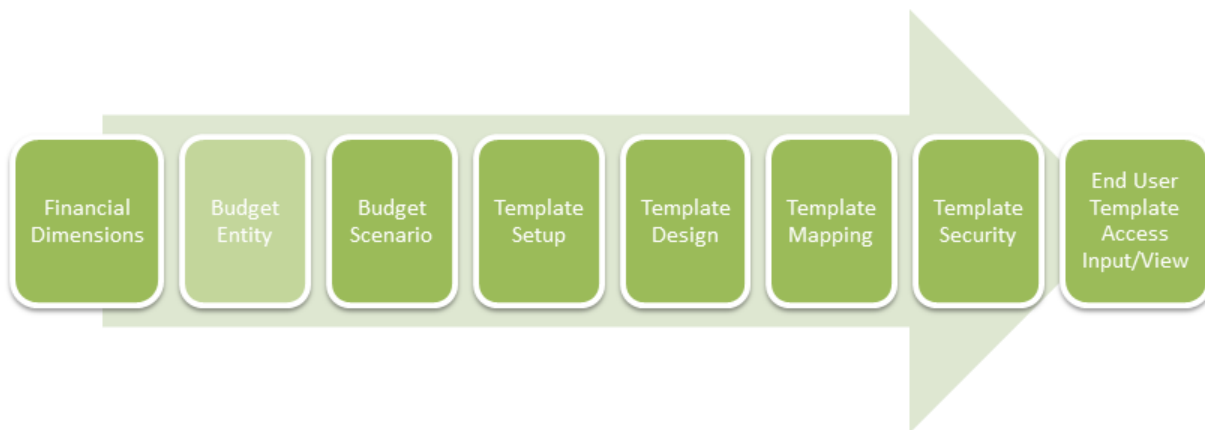
A budget entity is a combination of your financial dimensions that defines the level at which data is going to be entered into your budget templates. From a budget user's standpoint, the budget entity is the entry point for his/her piece of the budget.

A budget entity has a currency assigned to it. So, if you are working in a multi-currency environment, the assigned currency is applicable for that entire budget entity.

Budget entities are organized into a hierarchy. The hierarchy allows you to organize budget entities in such a way that access can be granted to a rollup or parent when the particular user has access to multiple budget entities.

Users are assigned budget entities – either parent or child level members – so that when a user accesses the Budget Control Panel, his/her assigned budget entities display.

For instance, John has been assigned to *Denver Admin* which is made up from the two required dimensions, **Company**, *Denver - 1* & **Department**, *400 - Admin*. John will plan and save his budget in the planning template which is assigned to his specific Budget entity *Denver Admin* where it will be stored and available for access in reports.



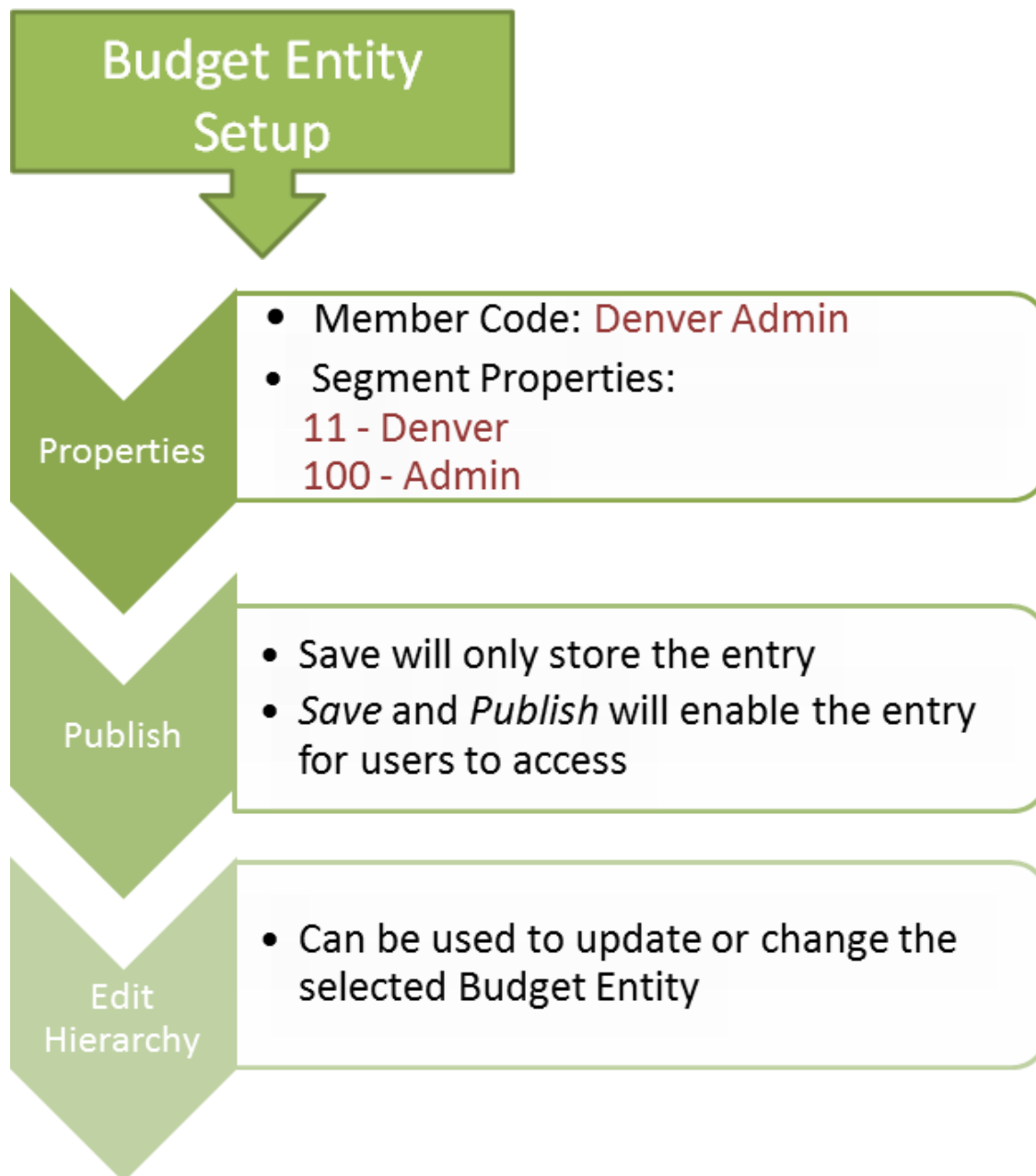


In this hands-on exercise, students manually add a single budget entity that will be used to assign to a specific budget user for planning and storing budget data.

To begin this exercise, you will navigate to:

Maintenance>Hierarchy> >Edit Hierarchy

Follow the flow diagram below to get through the steps of this exercise.



Summary

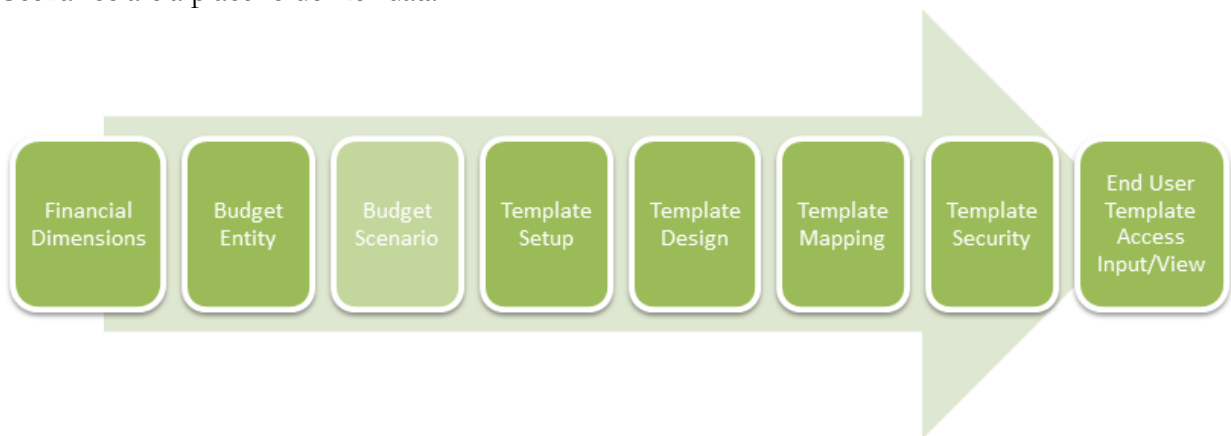
All implementations require the set up of dimensions, however, only those who plan to use the budgeting functions within Host Analytics are required to define the Budget Entity.

Next, students are introduced to scenarios and the role they play in your application. Similar to financial dimensions, scenarios are a required component within an implementation.

Scenario

Create Budget Type Scenario

Scenarios cover a specific pre-determined length of time such as a 12 period fiscal year, as defined in the budget parameters configuration task. When assigning security to your scenarios, users can be granted access to one, many, or all scenarios. Scenarios determine the columns in your budgets and again, relate to the pre-determined length of time. Data is loaded and stored by scenario in the cube. Scenarios are a placeholder for data.

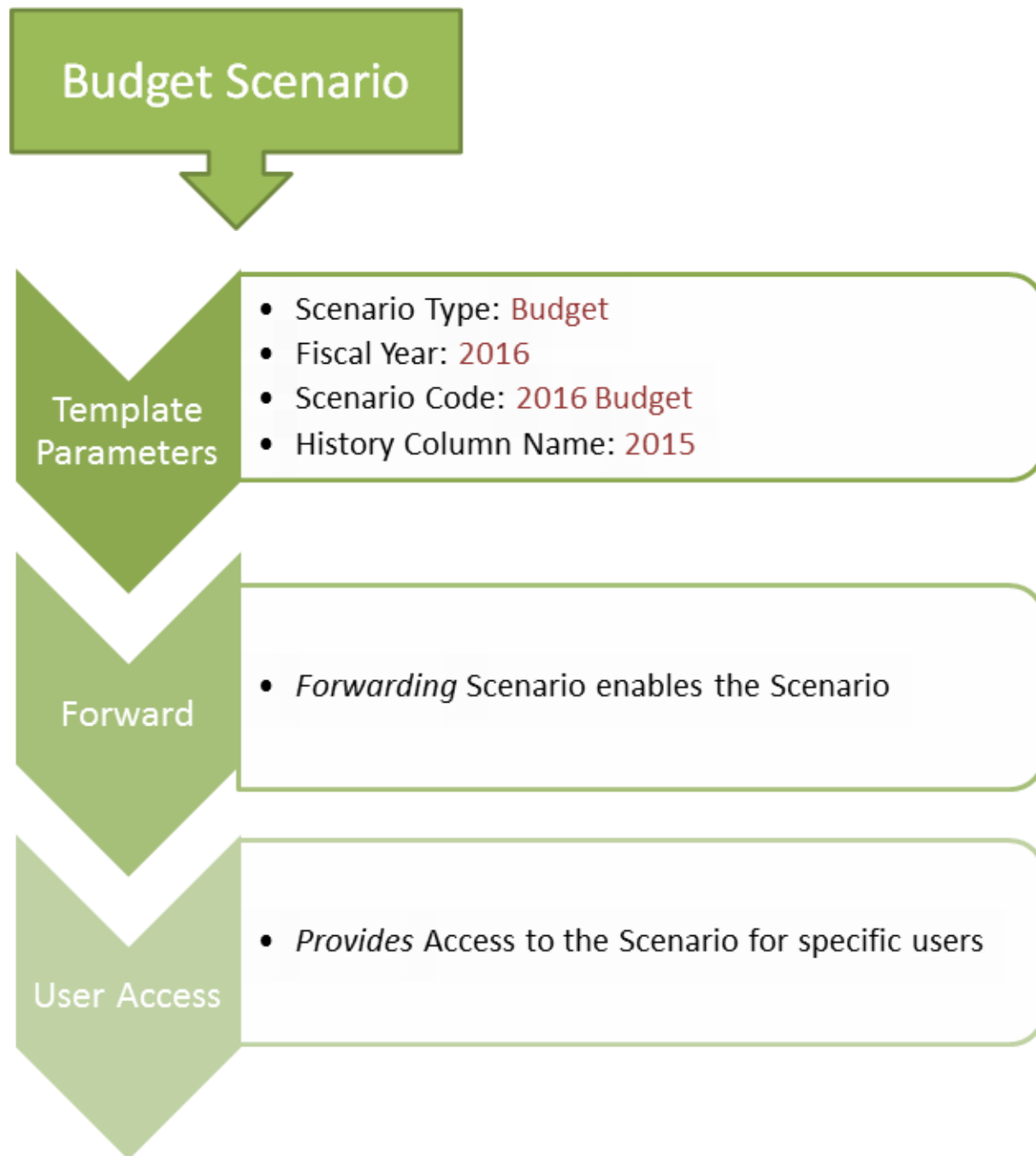


In this hands-on exercise, students define a scenario which is a length of time that will be used to store a 12 period fiscal year for the 2016 Budget data. An example could include periods Jan-Dec for 2016 Budget with 12 periods of historical actuals.

To begin this exercise, you will navigate to:

Maintenance>Scenario Setup>Add

Follow the flow diagram below to get through the steps of this exercise.



Summary

Scenarios are placeholders for a group of data, such as actual, budget or forecast.

Next, students use the budget scenario to explore templates, which are used for data entry.

Templates

Add an OpEx Budget Template

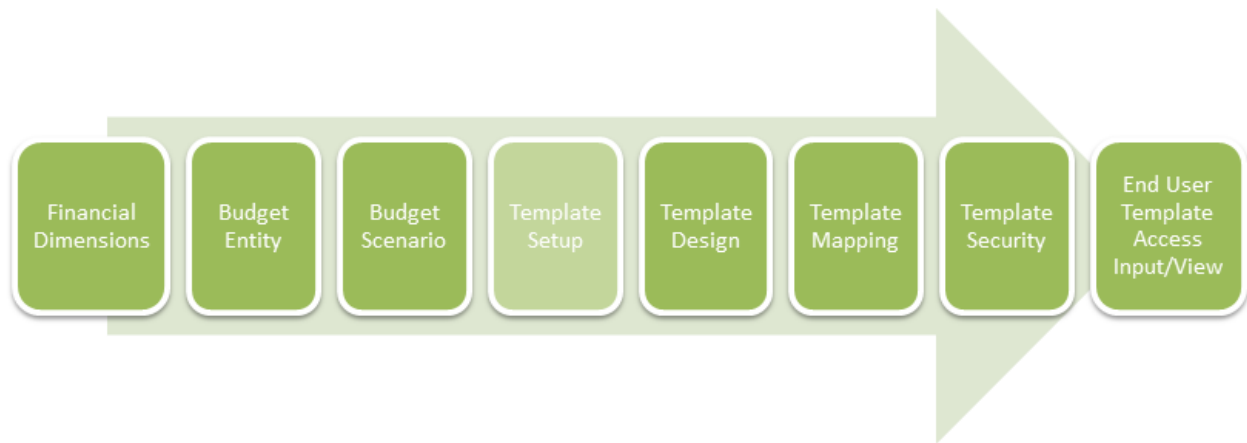
Templates are initially defined at the default scenario level, then mapped to working scenarios. A variety of functionality and display options are selected when defining a new template, these options are dependent on template type. Several options in the parameters cannot be changed after saving.

Choosing the best design to fit your needs will provide the best end result for maintenance and ease of use for the template. A template can incorporate different dimensions and include reports to establish a more centralized budget or forecast for budget users involved in the budgeting process.

Template rows are mapped to dimensions, *leaf level members* through template parameters.

Source options include:

- ▮ **AllMembers** in the dimension are available to be defined in the rows
- ▮ **Fixed Segment Members** are a single member selection
- ▮ **Filtered Segment Members** allows user to define multiple members
- ▮ **Budget Control Panel Member** is controlled by the budget entity
- ▮ **Allow Destination Account Setup** enables a row by row flexibility in a destination account that will override the budget entity in the template mapping.



In this hands-on exercise, students add the operating expenses budget template.

To begin this exercise, you will navigate to:

Maintenance>Templates>Add

Follow the flow diagram below to get through the steps of this exercise.

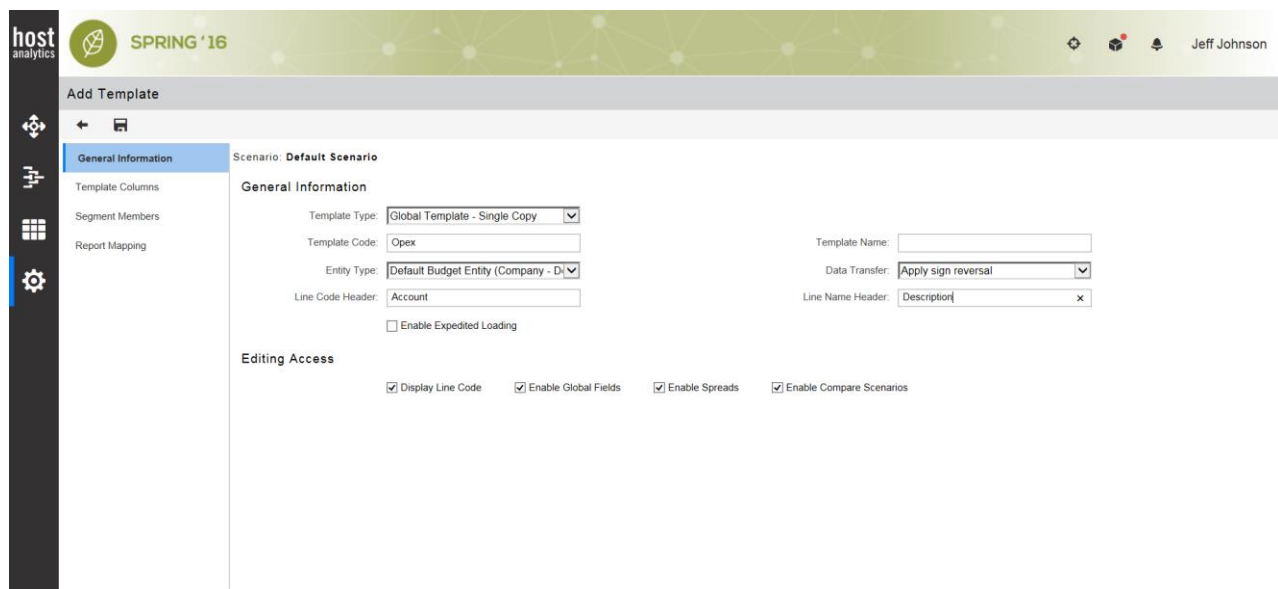
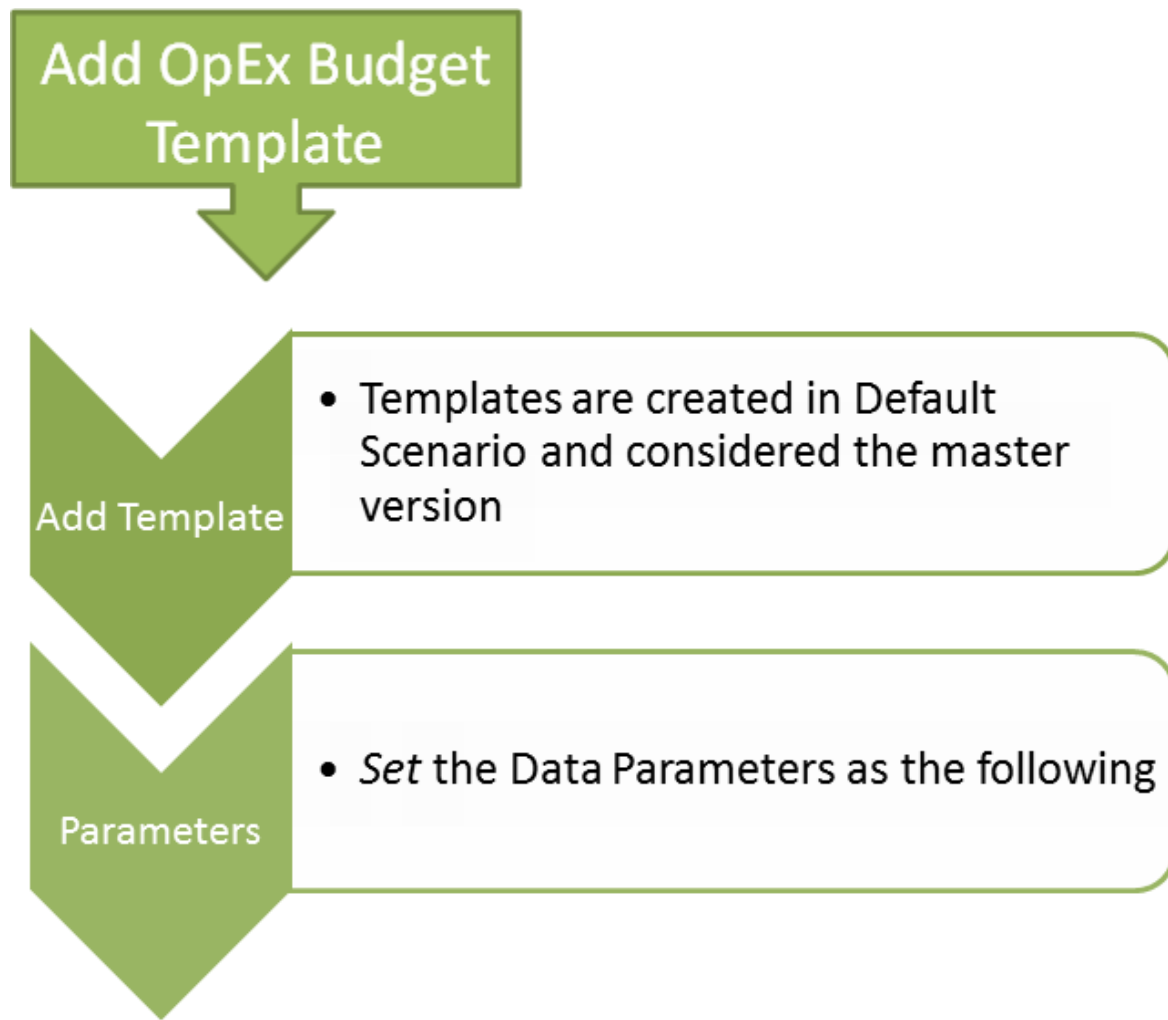
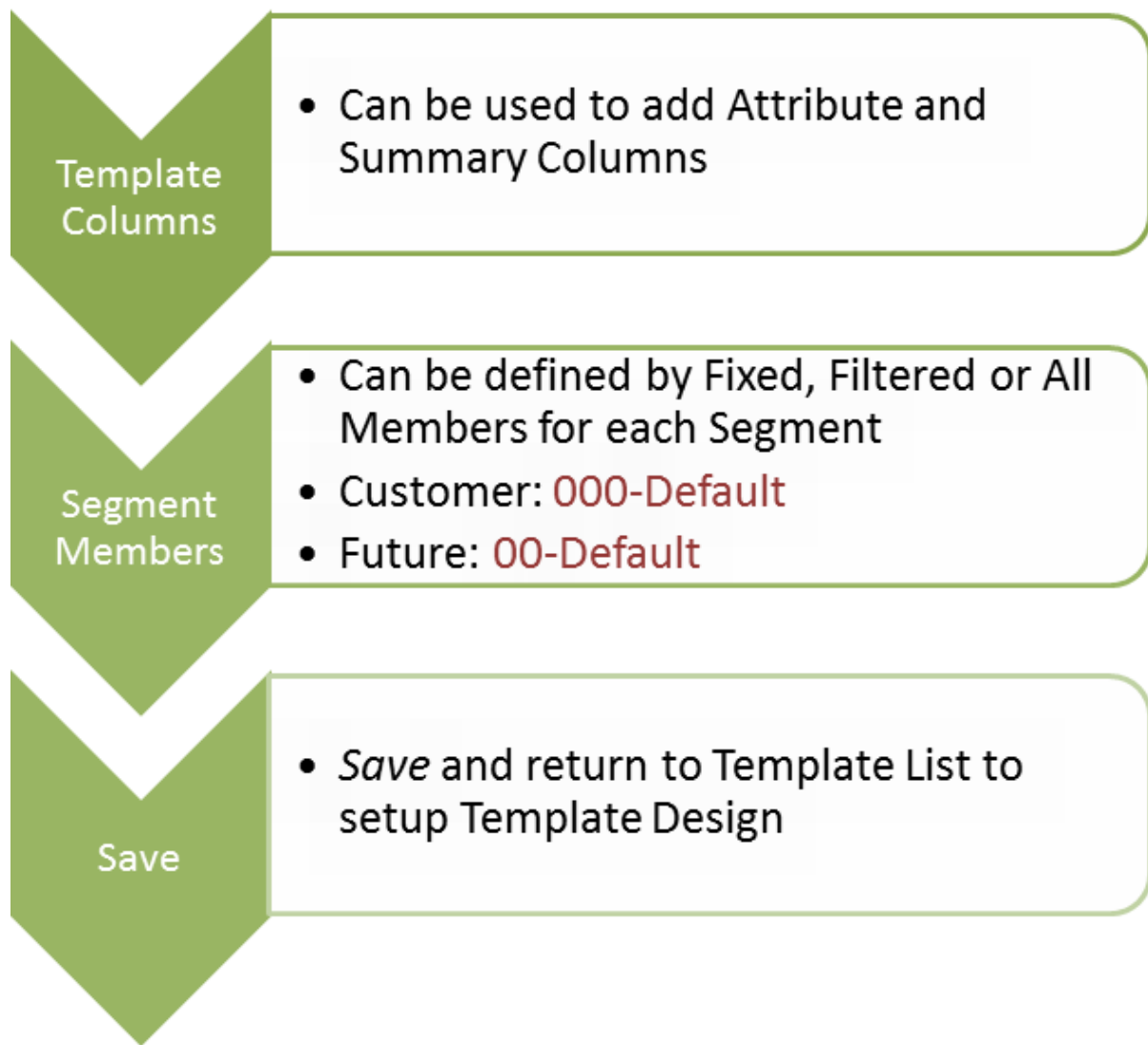


Figure 8.1 Parameters



Template List

+ ✎ 🗑️ 📄 Mappings ⌵ More

Scenario:

<input type="checkbox"/>	Template Label	Entity Dependent
<input type="checkbox"/>	HR	Yes
<input type="checkbox"/>	Opex	Yes

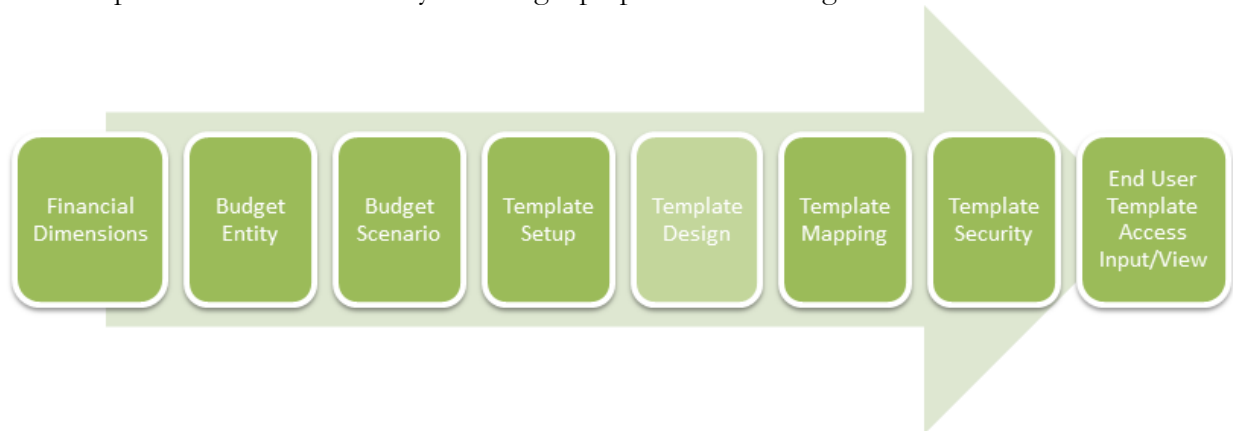
Figure 8.2 Template List


Design OpEx Template Rows

Once the template is defined and set up, the template is ready to be designed.

Designing the template to fit budget users' needs is important. Available functions such as headers, calculations and row lines that can be used to enter data and to reference data from existing sources are available. Formatting is also incorporated at this level.

This template will then be used by the budget preparer in the Budget Control Panel.





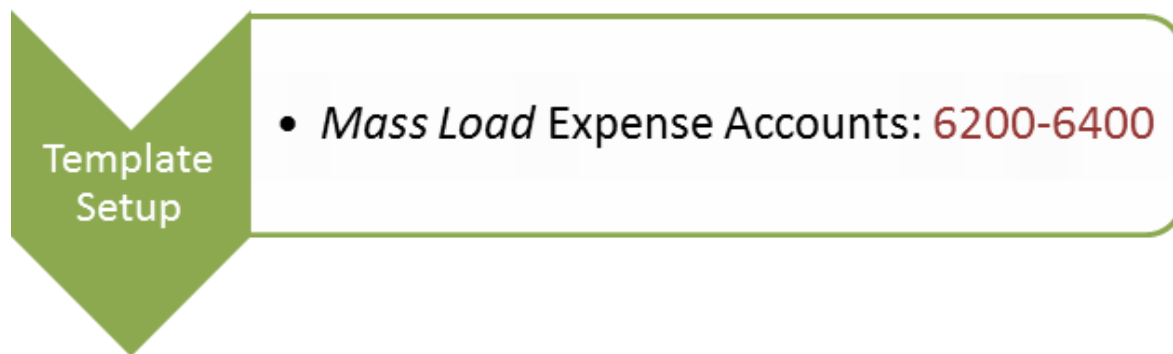
In this hands-on exercise, students design the operating expenses template rows, incorporate formatting and build calculations and begin to understand the first stage of designing an effective template.

To begin this exercise, you will navigate to:

Maintenance>Templates>Template Setup

Follow the flow diagram below to get through the steps of this exercise.





Mass Load

Customer: Future:

Product:

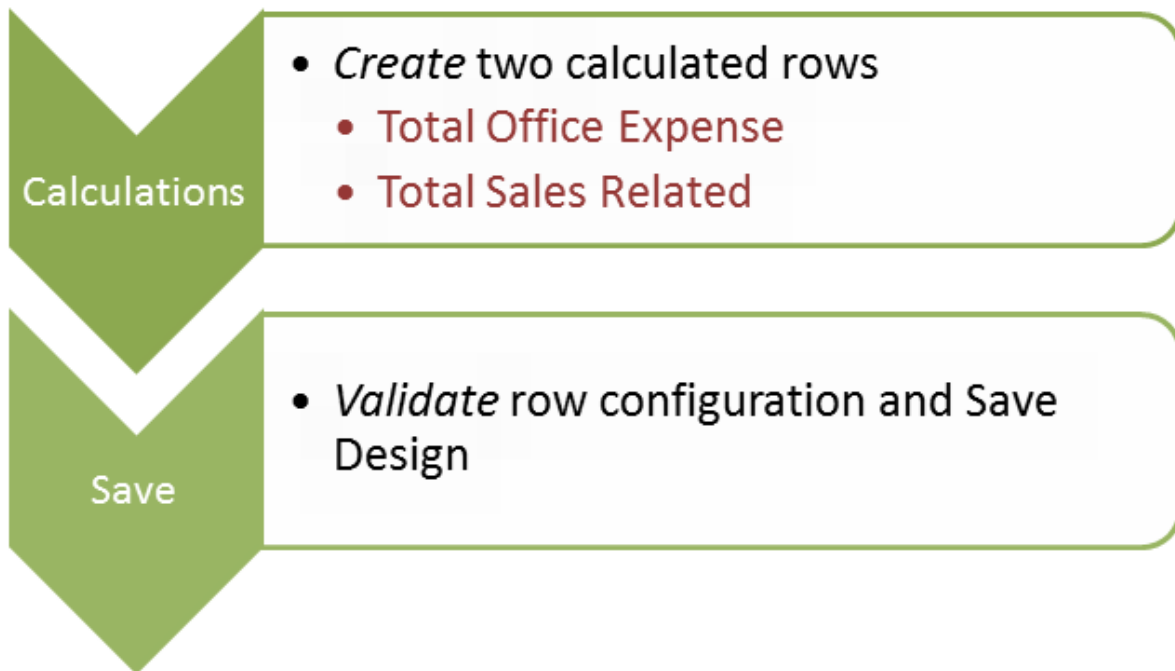
<input type="checkbox"/>	Account Code	Account Name
<input checked="" type="checkbox"/>	6225	Supplies Expense
<input checked="" type="checkbox"/>	6230	Telephone Expense
<input checked="" type="checkbox"/>	6240	Maintenance Expense
<input checked="" type="checkbox"/>	6250	Rent Expense
<input checked="" type="checkbox"/>	6260	Parking
<input checked="" type="checkbox"/>	6280	Utilities
<input checked="" type="checkbox"/>	6300	Travel Expense
<input checked="" type="checkbox"/>	6301	Airfare
<input checked="" type="checkbox"/>	6302	Hotel
<input checked="" type="checkbox"/>	6303	Car Rental <input type="button" value="Airfare"/>
<input checked="" type="checkbox"/>	6304	Meals
<input checked="" type="checkbox"/>	6350	Advertising Expense

1 to 100 of 103 Page 1

Figure 8.3 Mass Load Accounts

	K	L	M	N
18				
19			Account	Description
20	L		6200-[Company]-[C]	Office Expense
21	L		6210-[Company]-[C]	Insurance Expense
22	L		6225-[Company]-[C]	Supplies Expense
23	L		6230-[Company]-[C]	Telephone Expense
24	L		6240-[Company]-[C]	Maintenance Expense
25	L		6280-[Company]-[C]	Utilities
26	L		6300-[Company]-[C]	Travel Expense
27	L		6350-[Company]-[C]	Advertising Expense
28	L		6360-[Company]-[C]	Marketing Expense
29	L		6400-[Company]-[C]	Commissions Expense

Figure 8.4 Template Rows



Template Setup

← 📁 ↻ Mappings Methods More

Budget Type: Operational Planning | Scenario: Default Scenario

2 [] [] [] CALC [] B I U []

Y20

	K	L	M	
18				
19				
20	C			TOTAL OFFICE EXPENSES:
21	L		6200-[Company]-[C]	Office Expense
22	L		6210-[Company]-[C]	Insurance Expense
23	L		6225-[Company]-[C]	Supplies Expense
24	L		6230-[Company]-[C]	Telephone Expense
25	L		6240-[Company]-[C]	Maintenance Expense
26	L		6280-[Company]-[C]	Utilities
27	H			
28	C			TOTAL SALES RELATED:
29	L		6300-[Company]-[C]	Travel Expense
30	L		6350-[Company]-[C]	Advertising Expense
31	L		6360-[Company]-[C]	Marketing Expense
32	L		6400-[Company]-[C]	Commissions Expense

Click the row and select the line type.

Figure 8.5 Insert Calculation Rows

Template Setup

← 📄 ↺ Mappings Methods More

Budget Type: Operational Planning | Scenario: Default Scenario | Budget Entity: Default Budget Entity | Template: Opex

2 [Icons] CALC B I U A A Borders Format Number Decimals 0 Hidden No

K28 fx C

	K	L	M	N	Y	Z	AG	AH	AU	AV	AW	AX	AY	
18					Spreads		Compare Scenario	default Scenario	Budget	Budget	Budget	Budget	Budget	
19			Account	Description	Spread Code	Spread Value	History	1	Jan/1	Feb/1	Mar/1	Apr/1	May/1	
20	C			TOTAL OFFICE EXPENSES:					=SUBTOTAL(9,AU21:AU28)					
21	L		6200-[Company]-[C]	Office Expense					Copy and Paste Formula					
22	L		6210-[Company]-[C]	Insurance Expense					Copy and Paste Formula					
23	L		6225-[Company]-[C]	Supplies Expense					Copy and Paste Formula					
24	L		6230-[Company]-[C]	Telephone Expense					Copy and Paste Formula					
25	L		6240-[Company]-[C]	Maintenance Expense					Copy and Paste Formula					
26	L		6280-[Company]-[C]	Utilities					Copy and Paste Formula					
27	H													
28	C			TOTAL SALES RELATED:					=SUBTOTAL(9,AU31:AU34)					
29	L		6300-[Company]-[C]	Travel Expense					Copy and Paste Formula					
30	L		6350-[Company]-[C]	Advertising Expense					Copy and Paste Formula					
31	L		6360-[Company]-[C]	Marketing Expense					Copy and Paste Formula					
32	L		6400-[Company]-[C]	Commissions Expense					Copy and Paste Formula					

Figure 8.6 Completed Template



NOTE: '9' is the Excel based SUM function used in the subtotal formula.

Template Mapping

Template mapping provides a budget user access to the input template.

Specifically, templates must be related or mapped to budget entities, user approval roles, and scenarios so users may access it.

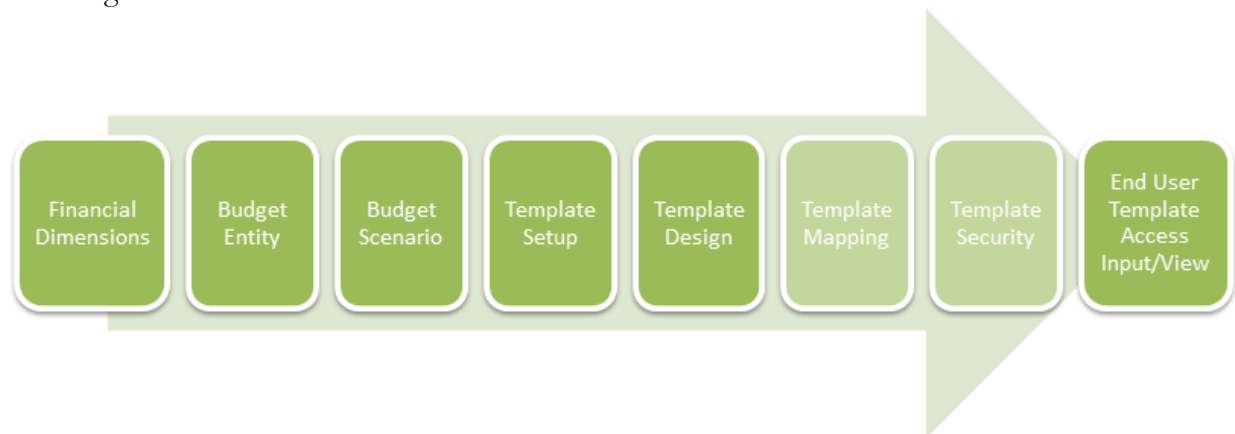
Templates are created at the default scenario level and must be mapped to a working scenario and mapped to budget entities.

Budget Entity mapping makes a template available for the selected budget entities. Only the users with permission will be able to access the template. Those specific users will have access to input and or review budgets and forecasts.

Approval Roles define what the user can do within the template – view, input, mark complete, or mark not complete. Individual users are assigned an approval role within User Management and/or in the template design. Three pre-defined approval roles are available in the application

Template Mapping is done after the Budget Entity and Approval Role has been mapped.

This is the final step to provide users template access within the Budget Control Panel. The template is mapped from the *Default* Scenario to the working scenario. The *Default* Scenario template is considered the Master Template and by mapping the template to a working scenario you have essentially created a copy that users will be able to access through the budget entity within their security permissions in the Budget Control Panel.



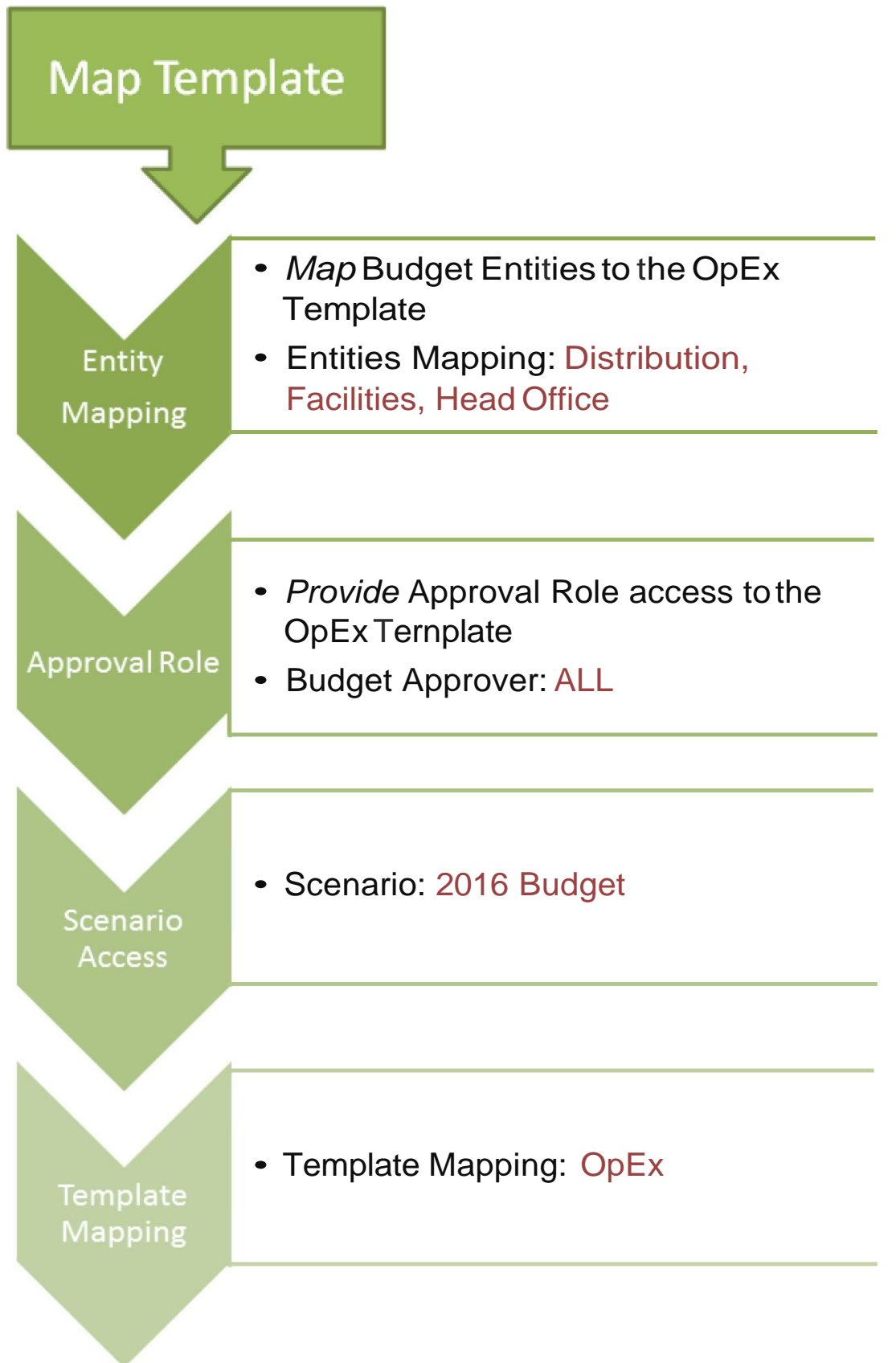


In this hands-on exercise, students map budget entities to the template, and assign the template to an approval role. Additionally, students map the template to the budget scenario. This exercise will demonstrate the workflow to provide the appropriate users with the necessary template.

To begin this exercise, you will navigate to:

Maintenance>Setup>Template Setup>Mappings

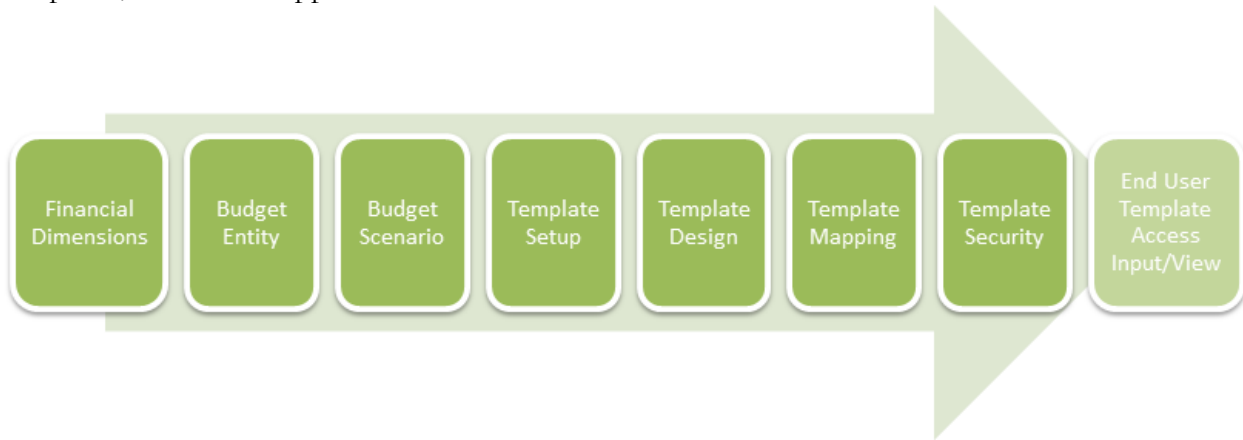
Follow the flow diagram below to get through the steps of this exercise.



Access Budget Template From Control Panel

Templates are available for input, view or mark complete under the Budget Control Panel.

The navigation role determines which menu options appear. Scenario access determines which scenarios appear in the drop-down listing, the approval role setup determines which budget entities you see, and the approval role determines the templates, actions and approvals available.

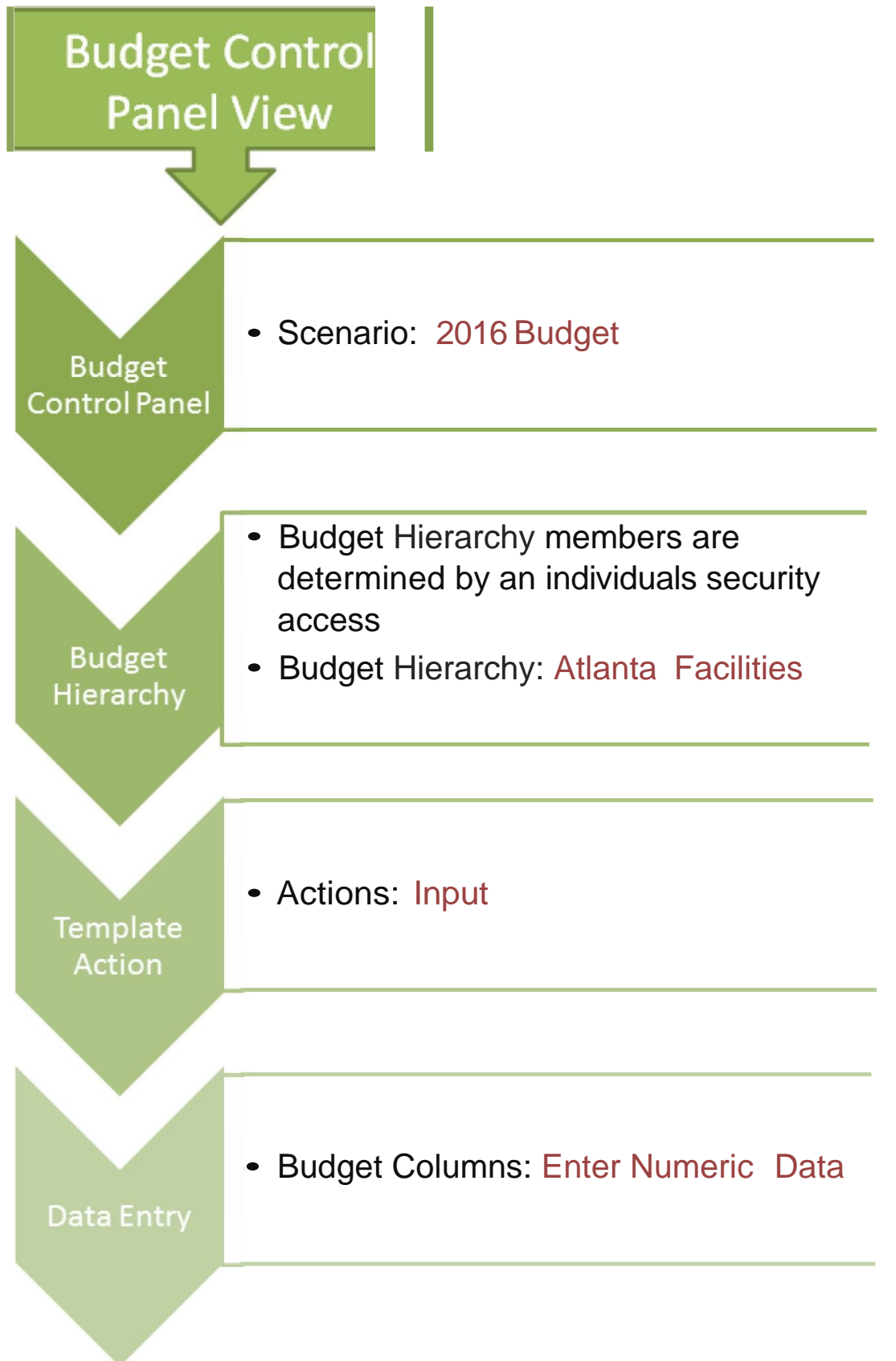



In this hands-on exercise, students access the budget input template using the control panel and view the template layout.

To begin this exercise, you will navigate to:

Budget>Scenario>Budget Hierarchy>OpEx

Follow the flow diagram below to get through the steps of this exercise.





SPRING '16

Input

← 📄 ↺ Select Template Methods More

Budget Type: **Operational Planning** | Scenario: **2016 Budget** | Budget Entity: **Denver Admin** | Template: **Opex** | Currency: **U**

M18 Account for posting budget data

	K	L	M	N	Y	Z	AG	AH	AU	AV
18					Spreads		Compare Scenari	2016 Budget	Budget	Budget
19			Account	Description	Spread Code	Spread Value	2015	2016	Jan-16	Feb-16
20	C			TOTAL OFFICE EXPENSES:			-	87,000	87,000	
21	L		6200-11-100-00-00	Office Expense			-	12,000	12,000	
22	L		6210-11-100-00-00	Insurance Expense			-	75,000	75,000	
23	L		6225-11-100-00-00	Supplies Expense			-	-		
24	L		6230-11-100-00-00	Telephone Expense			-	-		
25	L		6240-11-100-00-00	Maintenance Expense			-	-		
26	L		6280-11-100-00-00	Utilities			-	-		
27	H									
28	C			TOTAL SALES RELATED:			-	6,600	6,600	-
29	L		6300-11-100-00-00	Travel Expense			-	1,200	1,200	
30	L		6350-11-100-00-00	Advertising Expense			-	1,000	1,000	
31	L		6360-11-100-00-00	Marketing Expense			-	400	400	
32	L		6400-11-100-00-00	Commissions Expense			-	4,000	4,000	

Figure 8.7 Budget Template Input

Learning Goals - Section 2

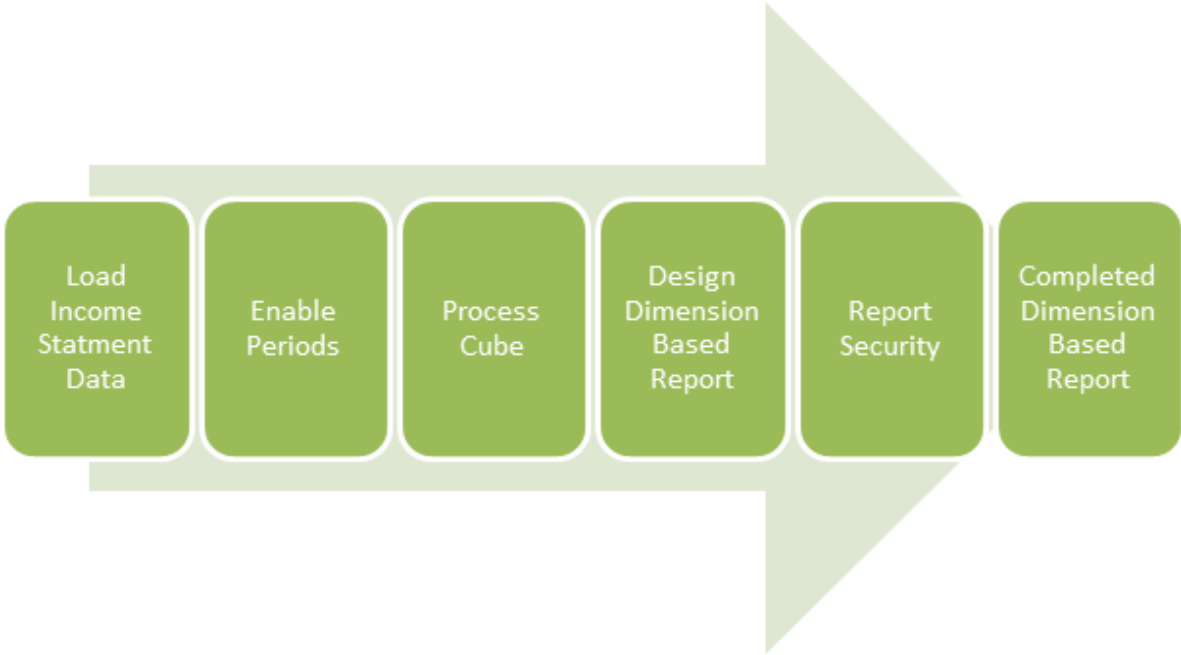
Learning Goals

At the completion of today's training session, you will be able to:

1. Use the Data Load Rule functionality to load data
2. Enable time periods to view in reports
3. Process the cube to ensure data is available in reporting
4. Design a dimension-based report and use it to validate loaded data
5. Provide users the ability to access the report with security restrictions

Data Load Rules deliver a quick and efficient method to load data. Administrators and end users (who have appropriate security access) have the capability to design ad hoc reports that can be used to validate data and create presentation-quality reports. But before data can be accessed, users must **Enable Data Periods** and **Process Cube**.

The following diagram establishes the process flow to load data, enable periods, provide report security and design a dimension based report.



Loading Data

Load Income Statement Data with a Data Load Rule (DLR)

A Data Load Rule is one form of getting data into Host Analytics. A Data Load Rule is a quick and efficient way of uploading large volumes of data into the system.

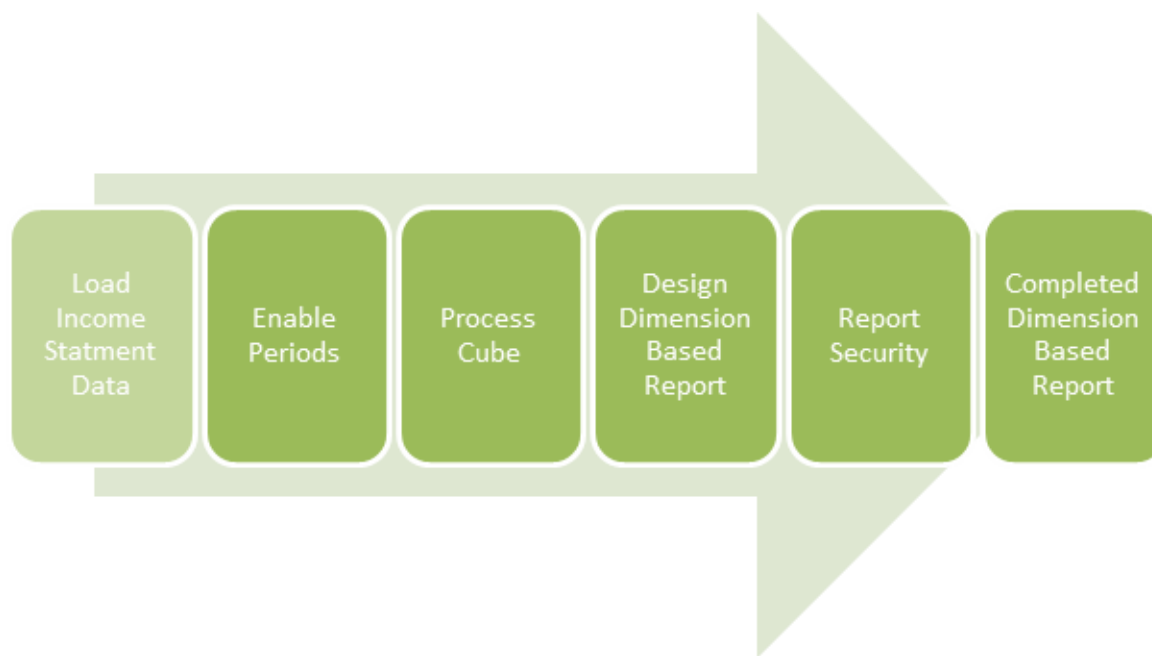
Data Load Rules provides users the security to load data using unique Data Load Rules assigned to a specific individual.

For instance, John is responsible for loading data for his company located in *Denver*. John has been assigned to a specific Data Load Rule with the company *Denver* pre-defined in the Data Load Rule. John's data will be loaded specifically and only to *Denver*.

Various forms of loads can be performed using a Data Load Rule such as: *Dimension Hierarchies*, data both *GL* and *Transaction*, *Attributes*, *Attribute Hierarchies*, *Entity Hierarchies*, *User Information*, and *Exchange Rates*. File types that can be loaded include *csv*, *txt*, *xls*, and *xlsx*.



NOTE: Prior to loading actual data, ensure that a partition has been created in the reporting cube. A system administrator is responsible for creating the partition at the start of the new fiscal year. Review the elearning video on how to add a partition in the **EPM Academy** Foundations course.

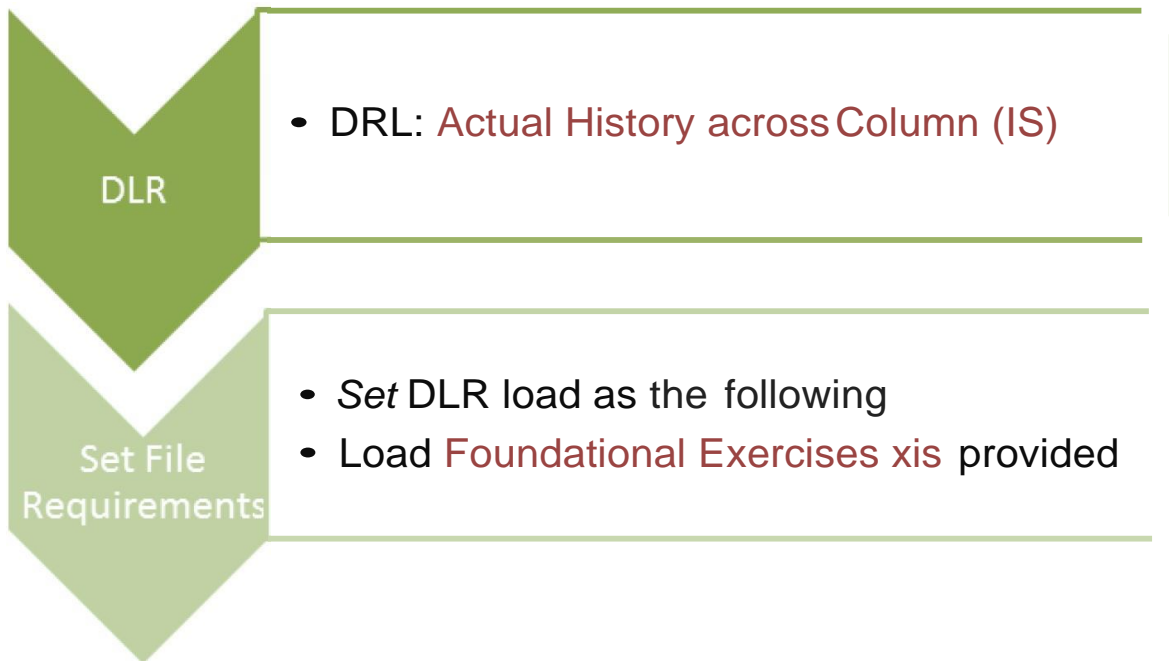


In this hands-on exercise, students explore the Data Load Rule by defining parameters, identifying source fields and validating default members in a Actual 2015 Income Statement data load.

To begin this exercise, you will navigate to:

Maintenance>DLR>Data Load Rules

Data Load Rule-
Load Income
Statement Data



host analytics SPRING '16 Jeff Johnson

Data Load Rules

Rule: Actual History across Columns (IS) | Data: GL Data

File Requirements

File Type: xls

Column Delimiter: Tab

Row Delimiter: [CR](LF)

Text Qualifier: Double Quote

Header

Row Containing Header: 1

Number of Rows to Skip: 1

Number of Source Fields: 15

Number Format

Thousand Separator: Comma(,)

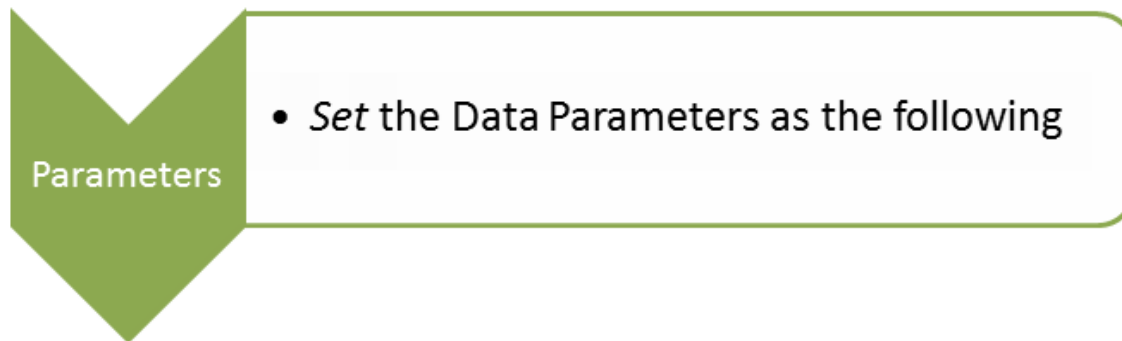
Decimal Separator: Dot(.)

Step 3 of 7 Back Next Finish Cancel

Figure 10.1 Select Sample Input File



NOTE: Only the first tab located on the .xls spreadsheet will load
Reorganize tabs when necessary



Rule: **Actual History across Columns (IS)** | Data: **GL Data**

Parameters

Reporting:

Credit/Debit:

Data Type:

Calculate Trial Balance:

Currency Conversion:

Scenario Type:

Scenario:

Frequency:

Time Mapping:

Automatic Cube Refresh:

Roll Annual Balances:

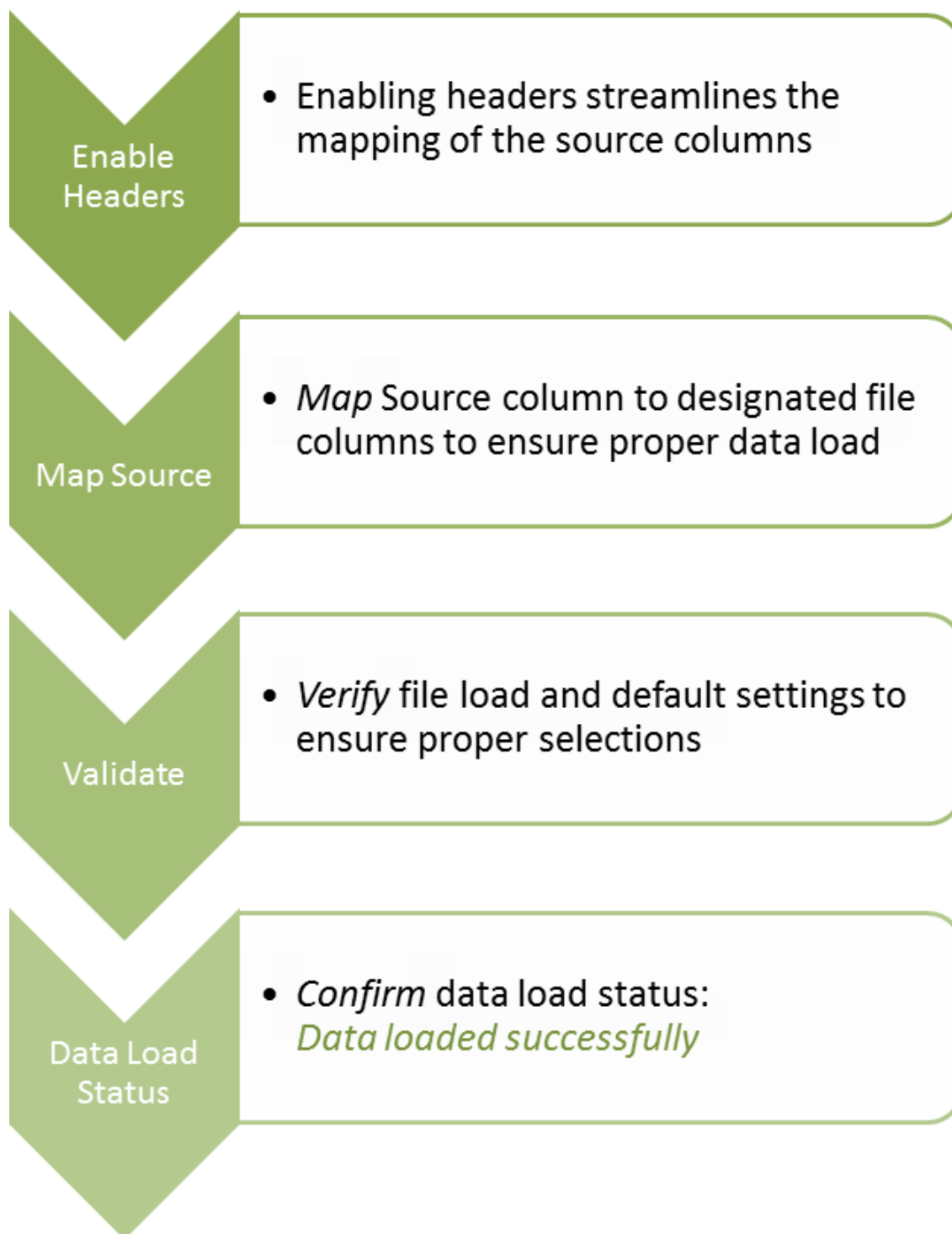
Figure 10.2 Define Overall Rule Settings - Parameters

Parameter	Include In Data File	Select
Account	<input type="text" value="Yes"/>	
Company	<input type="text" value="Yes"/>	
Department	<input type="text" value="No"/>	<input type="text" value="000"/>
Product	<input type="text" value="No"/>	<input type="text" value="00"/>
Customer	<input type="text" value="No"/>	<input type="text" value="000"/>
Future	<input type="text" value="No"/>	<input type="text" value="00"/>
Fiscal Year	<input type="text" value="No"/>	<input type="text" value="2015"/>
Fiscal Month	<input type="text" value="Yes"/>	

Figure 10.3 Define Overall Rule Settings - Defaults



IMPORTANT: The ability to clear data is also available. When a segment is selected to “Include in Clear Data,” the data load will only overwrite data in segment combinations that have previously been loaded to. If data exists from a previous load, that is not in the current load, this data will not be overwritten unless the segment checkbox is cleared.



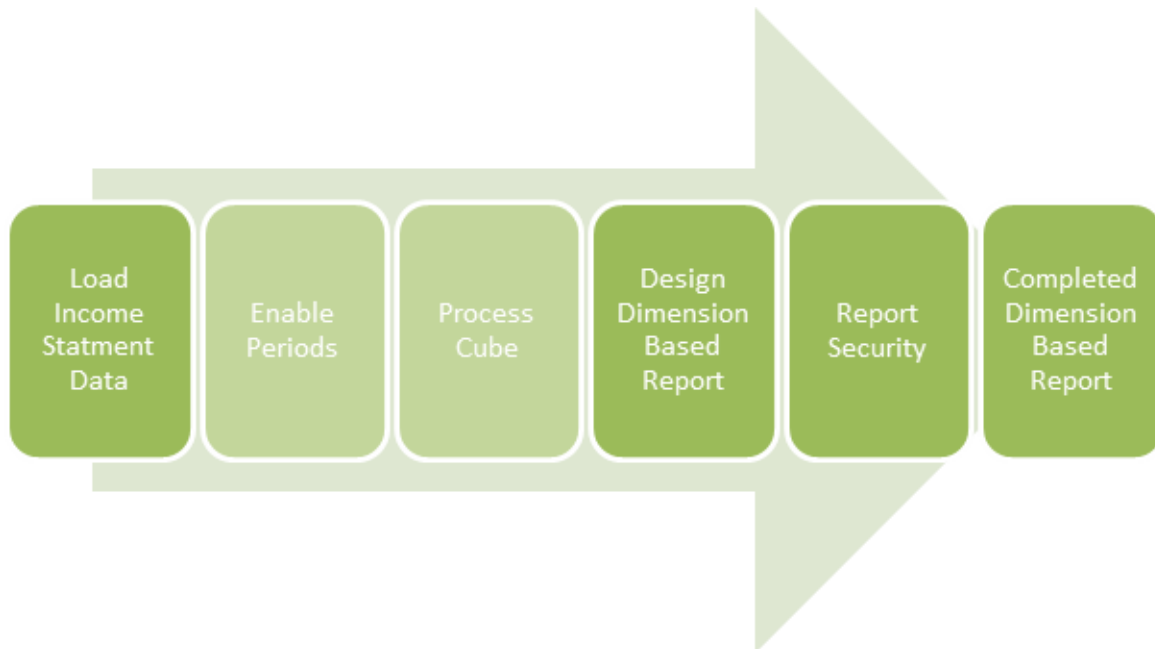
NOTE: All data loaded through a data load rule can be cleared by clicking *Clear Data* on the Data Load Rule List (first step).

Actual Data Load Months & Process Cube Partition

Once data is loaded successfully, a few steps must be completed prior to reviewing the data in reports. First, the related periods to be processed in the reporting cube need to be selected on the *Actual Data Load Months* tab located in Maintenance, Lock Data. Next, the cube must then be processed so the data is visible in reports.



NOTE: Loaded data may be viewed in verify data prior to processing the cube, but the cube must be processed to enable data for templates and reports.

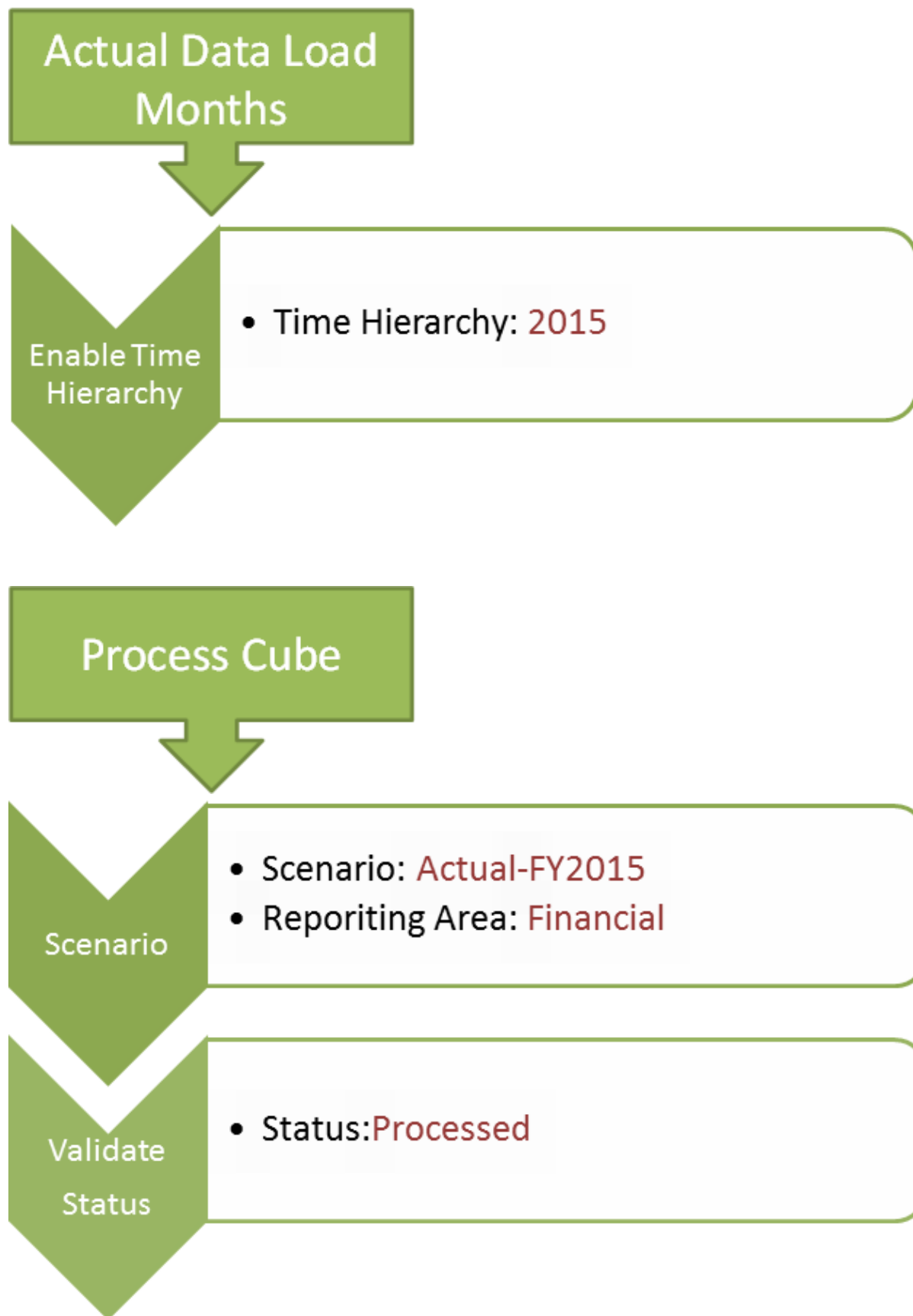


In this hands-on exercise, students authorize the 2015 Actual Data Load Months, and process the related cube partition to enable data access within reporting and templates.

To begin this exercise, you will navigate to:

Enable Periods: Maintenance>Over view>Lock Data>Actual Data Load Months

Process Cube: Maintenance>Process Reporting Area>Scenarios



Scenarios Dimensions

Process Now

Reporting Area: Financial

Send E-mail Notification

Default Measure: MTD | Size: 0 MB

<input type="checkbox"/>	Scenario	Status	Period
<input type="checkbox"/>	2013 Budget	Not Created	Jan-13 to Dec-14
<input type="checkbox"/>	2013 Forecast	Not Created	Jan-13 to Dec-14
<input type="checkbox"/>	2014 Budget	Unprocessed	Jan-14 to Dec-15
<input type="checkbox"/>	2014 Budget CB - 2014 Budget CB	Unprocessed	Jan-14 to Dec-15
<input type="checkbox"/>	2016 Budget	Unprocessed	Jan-16 to Dec-17
<input type="checkbox"/>	Actual-FY2011	Unprocessed	Jan-11 to Dec-11
<input type="checkbox"/>	Actual-FY2012	Unprocessed	Jan-12 to Dec-12
<input type="checkbox"/>	Actual-FY2013	Unprocessed	Jan-13 to Dec-13
<input type="checkbox"/>	Actual-FY2014	Processed	Jan-14 to Dec-14
<input checked="" type="checkbox"/>	Actual-FY2015	Processed	Jan-15 to Dec-15
<input type="checkbox"/>	Actual-FY2016	Processed	Jan-16 to Dec-16
<input type="checkbox"/>	Q4 2013 Forecast CB - Q4 2013	Unprocessed	Jan-13 to Dec-14

Figure 10.4 Actual-FY2015 Partition - Processing Cube



NOTE: The cube can also be processed and viewed by selecting the cube icon located below the user name.



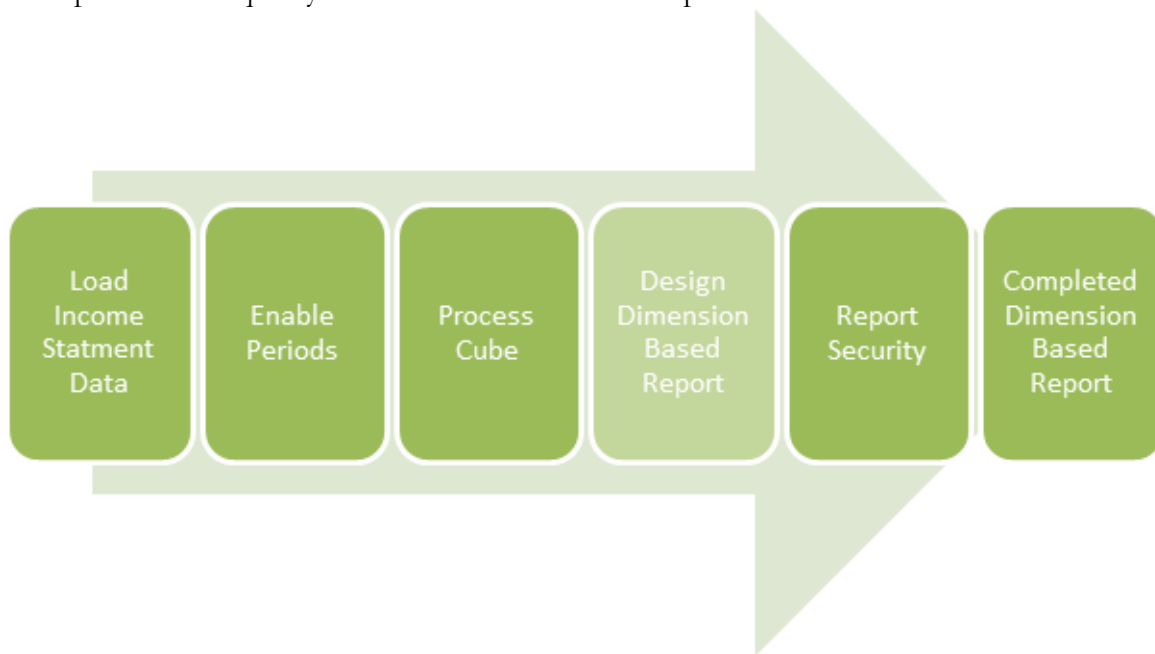
Figure 10.5 Cube Icon

Reporting

Create a Dimension-Based Dynamic Report

There are two different types of dynamic reports: dimension-based and report sets. Dimension-based reports are created when financial dimensions are defined by dragging and dropping them into the column, row, or page and selecting the necessary members needed to fit the reporting needs.

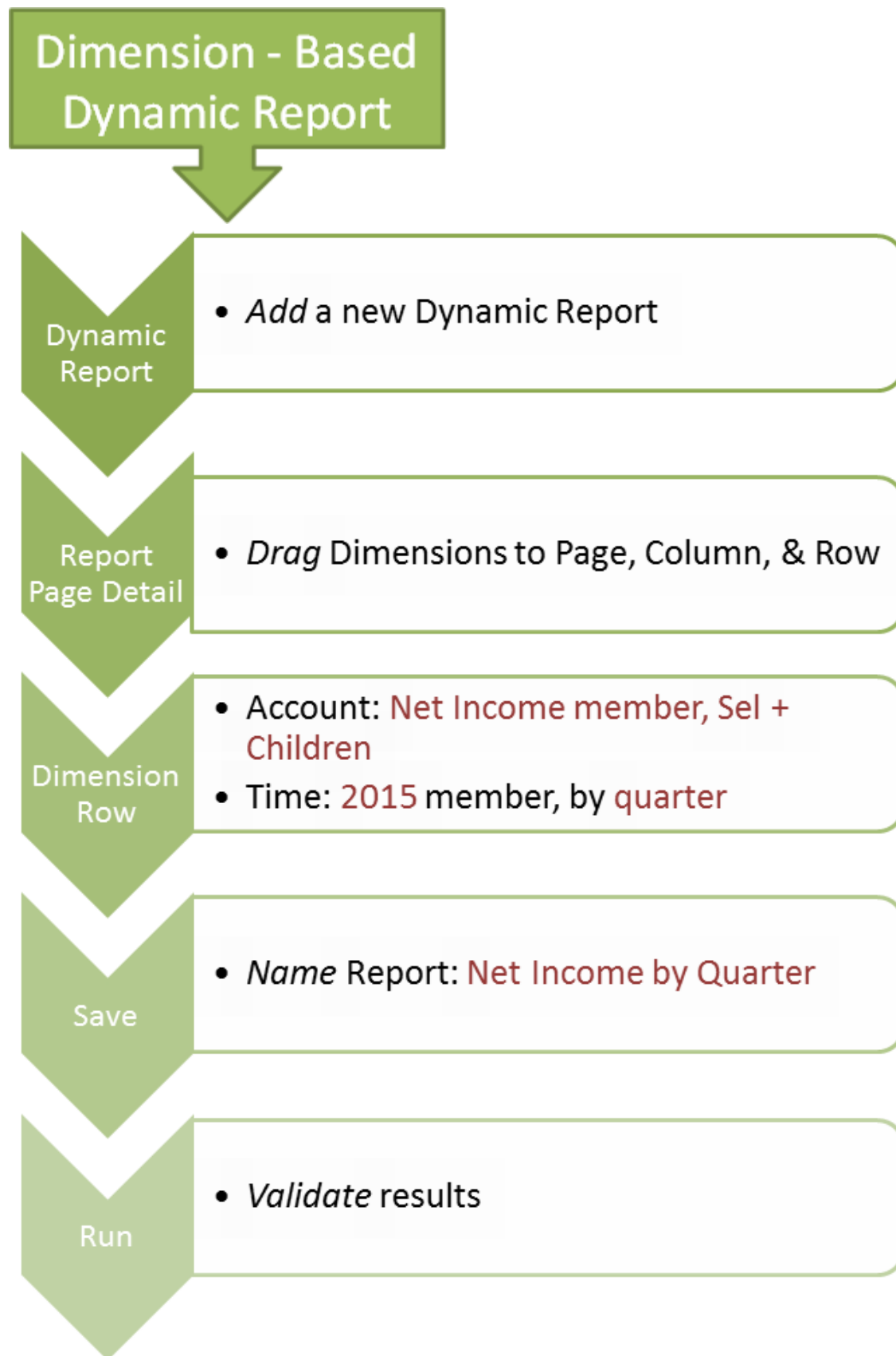
The second type of dynamic report the Report Set which are based on pre-defined rows and columns. The Report Set functionality allows for a customized view with more presentation-quality than the dimension-based reports.



In this hands-on exercise, students create a dimension-based account detail report.

To begin this exercise, you will navigate to:

Reports>Add



Dimensions

- Account
- CalculatedDim
- Company
- Customer
- Department
- Future
- Measures
- Product
- Reporting
- Scenario
- Time

Page: Actual

Row: Account

Column: Time

Net Income by Quarter

Suppress Drill Through \$ Format + More

	A	B	C	D	E
1	Account	+Q1 2015	+Q2 2015	+Q3 2015	+Q4 2015
2	-Net Income	28,949,945	7,197,957	8,194,696	18,660,456
3	+Revenue, Net	76,189,904	52,826,227	54,939,276	77,126,292
4	+Cost of Goods Sold	25,116,977	27,907,752	29,024,062	40,745,318
5	+Expenses	22,477,560	18,089,668	20,839,705	18,112,462
6	+Other Income/(Expense)	354,578	369,150	3,119,187	391,944

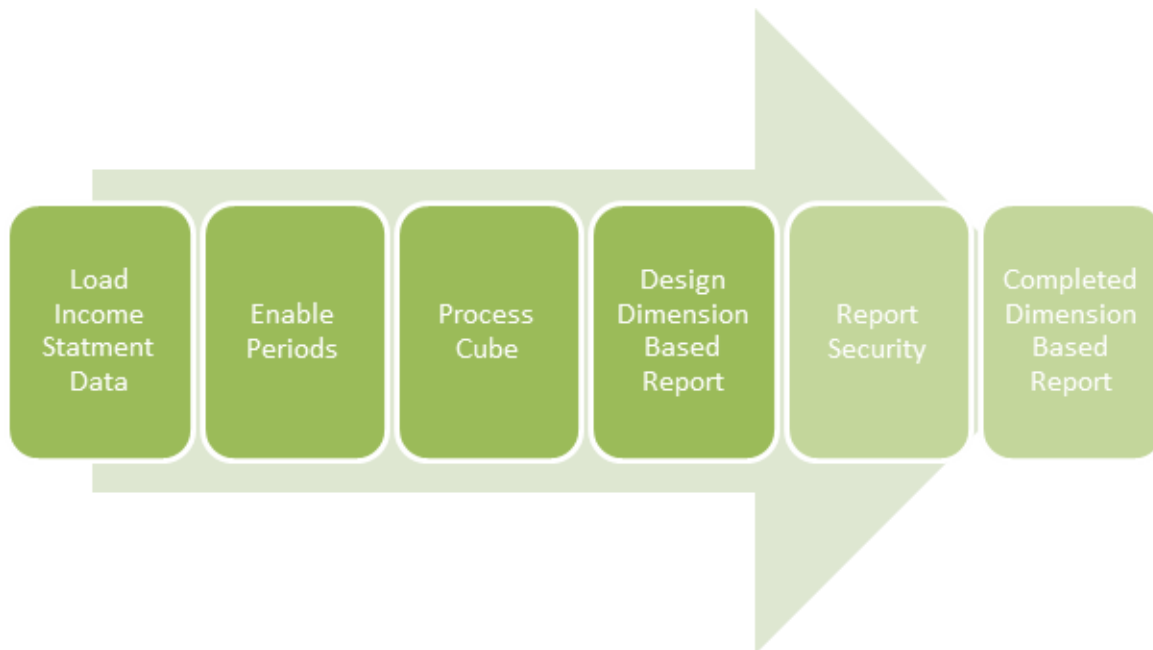
Figure 11.1 Net Income by Quarter dimension-based report

Report Security

Reports provide important information and are used to analyze many aspects of a business. To provide users and user groups with access to generated reports, each user or user group must be assigned access privileges.

Access types include:

- **No (Access)** - Indicates the user or user group has no access privileges to the report
- **Read** - User or user group can perform all actions except save, save as, copy, edit, delete, rename, and security. User can run the report, drill-down, drill-through, check the usage report and add the reports to favorites
- **Edit** - The Edit option is enabled only for folders. There is NO edit access for reporting artifacts.
- **Full Control** - The User or user group can perform all actions including save, save as, copy, edit, delete, rename, and security. The user can run reports, drill-down and drill-through, check the usage report, and add reports to favorites.





In this hands-on exercise, students review a specific reports user security and access type.

To begin this exercise, you will navigate to:

Reports>Security Icon

Report Level Security

Security

- Report Access: User or a User Group can be selected to provide access to specific reports

Access Type

- *Verify* Type: **Full Control**

Use Case

Create an ad hoc report



In this hands-on take away exercise, Students create a second dimension-based report, multiple dimensions should be mapped to the row and column.

To begin this exercise, you will navigate to:

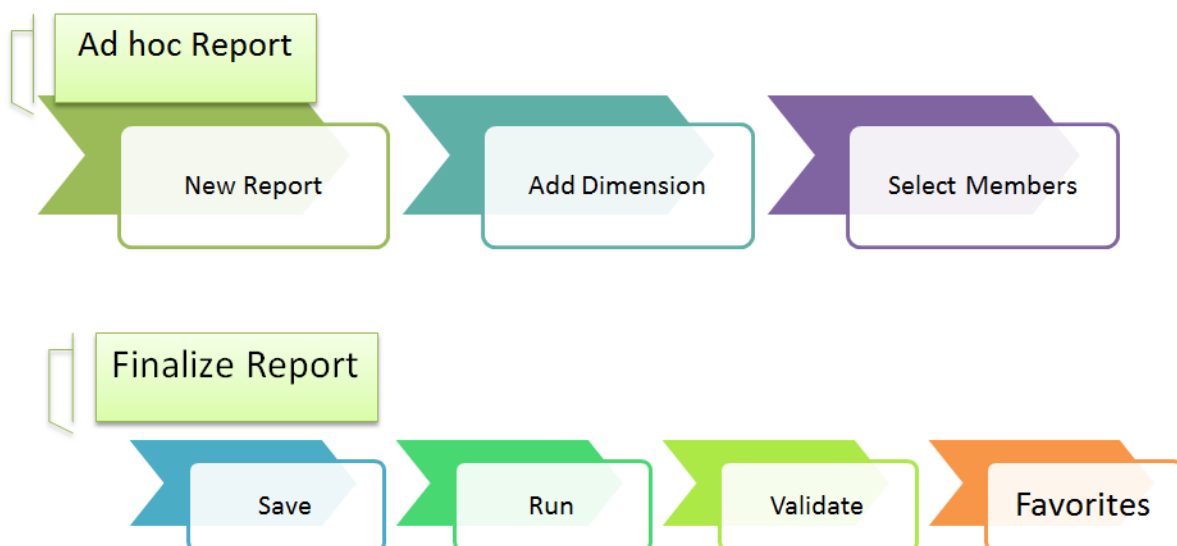
Maintenance>Reports

Students create an ad hoc report

- ▮ Student adds a new report
- ▮ Dimensions are added to the column, row and page in the report setup
- ▮ Appropriate members are selected for each dimension based on student's role and responsibility

Students finalize Report

- ▮ Save report into student's folder for validation
- ▮ Verify report location, run and validate results
- ▮ Add the new ad hoc report to student's favorites.



Summary

In this portion of training, students were introduced to dimension-based report design.

As you have seen, report design can be quick and easy, as well as customized to your unique reporting needs.

To further your report design skills, please review the course offerings listed in the learning management system at **Academy.HostAnalytics.com**