TARGIT Fundamentals Course

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This course will guide you through the fundamentals of the TARGIT Decision Suite.

The Start Page

The Start page of the TARGIT windows client presents som shortcuts for working with existing documents. These shortcuts, such as 'Pinned folders' can be customized to your own preferences.

Designer / Consumer modes

The TARGIT Windows client is primarily a *Designer* client, but it can also be used as a Consumer client. When working as a Designer, you can easily switch to a Consumer preview of your work.

Consumer mode is necessary, for instance, for features such as *Drill down criteria* and *Triggers* to work.

A few nice-to-know keyboard shortcuts:

- F2 will toggle Designer and Consumer modes.
- F3 will toggle the Ribbon above the canvas.
- F4 will toggle the Smartpad to the left of the canvas.

Data Filtering from the Criteria bar

From dimensions on the Criteria bar you can easily filter the data you are looking at in your analysis. Every filter you apply from the Criteria bar will work as a 'Global filter', i.e. a filter that works on all objects in your analysis. Furthermore, you can do searches among the dimension members, and you can prevent conflicting criteria that would otherwise result in empty analyses.

Drill down criteria

One of the strong points of TARGIT is the built in 'Drill down' filter functionality between objects in an analysis.

In short, it means that clicking anything in one object will immediately work as a filter upon the other objects.

This is an extremely powerful fetaure - and it should encourage designers to design multi object analyses, rather than trying to cram too much information into one single crosstab.

Sorting and working with hierarchies

Sorting is done from columns headers in crosstabs. If you have a graph that needs sorting, you will simply have to switch to the crosstab behind it in order to sort the data.

TARGIT treats hierarchies in a nice way be providing buttons for easy navigation from one level of a hierarchy to another.

New analysis from scratch, including number formatting

Dashboards are created from the available Cubes, Measures and Dimensions in your Source Data tab.

We will be starting out with some basic objects.

You may add as many objects to one dashboard, as it makes sense to have on one page.

Rearrange, Align and Group objects

To move an object, grab it by its handle in the object's upper left corner.

When moving the object around, you may be guided by orange or green guide lines to ensure correct alignment with the page and other objects.

An object may be resized simply by dragging its borders, or, if more precision is needed, you can type in exact values for Width and Height as well as for X and Y position (from upper left corner).

Crosstab Autofit

Crosstabs columns can be stretched to fit the size of crosstab object box.

You have three options for Autofitting:

- Autofit (stretches all columns equally)
- Autofit dimensions (stretches dimension columns while preserving measure column widths)
- Autofit measures (stretches measure columns while preserving dimension column widths)

Criteria bar

The easiest way to work with *Global criteria* is to place some of the dimensions on a *Criteria bar* above all the objects. To add a dimension to the Criteria bar, simply right click the dimension in the Smartpad Source data and choose *Add to criteria bar*.

Basic Chart Properties

In this video, you will see some of the basic chart formatting options.

Advanced Chart Properties

This is a classic example on how to handle multiple series of data, where data are on completely different scales.

The video will show how to set up a combined column chart / line chart.

Working with Layouts

A Document may contain a number of different *Layouts*. You may start out by designing an analysis with a layout suitable for landscape mode on PC desktops. Next, in the same document, using the same objects, you could add a new layout suitable for e.g. portrait mode on a Tablet.

Object Scaling

Although most objects would automatically scale correctly when switching between layouts with different page sizes, you may occasionally want to work with some manual object scaling. This would usually be something to be considered when working with crosstabs or other objects containing text or labels.

Device Visibility

TARGIT will use a set of rules to detect which Layout it should open by default on a specific device type:

1. TARGIT will open the first Layout (reading from top of list) that is **Enabled, Designed for** and matches the **Orientation** of the current device.
2. If rule 1 fails, TARGIT will open the first Layout (reading from top of list) that is **Enabled** and matches the **Orientation** of the current device.
3. If rule 1 and 2 fails, TARGIT will open the first Layout (reading from top of list) that is **Enabled** for the current device.

Dynamic Criteria

TARGIT's *Dynamic Criteria* is an extremely useful and flexible way of working with dynamic analyses, such as "Year to Date", "Previous Month", "Running 12 months" etc.

Basic User Dimensions

A *User dimension* is a dimension that is created by the end-user. The individual dimension members of a User dimension are defined from criteria from one or more standard dimensions.

User Dimensions with Dynamic Criteria

Quite often, an organization wants to analyze their data by comparing one set of data to another set of data. E.g., data for a recent period compared to the same period one year earlier.

If the comparable data sets are as trivial as e.g. two years, then you would probably just a Time dimension on the Year level, but if the comparable data sets are slightly more advanced, then you would need a *User dimension*.

When you combine Dynamic Criteria with User dimensions, you will be able to produce dynamic analyses, such as: *Compare revenue of Year to date to revenue of the same period last year.*

Basic Calculations

TARGIT offers a number of predefined calculations that in many cases will deliver the result that you need.

You can tweek these calculations to your own needs or you can create new calculations yourself with an easy point-and-click approach.

Color agents

With color agents, you can highlight the data that require special attention.

You can change conditions for your color agents to match your own requirements.

Please notice that the order in which the color agents are applied, may play a role. Re-arrange them, if necessary.

Report Layout with Repeater page

The essence of adding data to a Report Layout - crosstabs, graphs, KPI objects etc. - is identical to that of adding data to a Dashboard Layout.

You can even have a Document with both layout types - Dashboard Layouts and Report Layouts - sharing objects from the Objects list.

Report Layouts differ from Dashboard Layouts mainly on these topics:

- **Pages.** A Report Layout may contain multiple pages with different layout and different content on each page. Pages can be of different sizes and formats.
- **Repeater page.** The *Repeater page* in a Report Layout repeats content on as many pages as necessary. E.g. a very long crosstab may need to be repeated (continued) across multiple pages to show all the data.

Multi-page report

A Report Layout may contain multiple pages with different layout and different content on each page. Pages can be of different sizes and formats.

Report Page Headers and Page Footers

Page headers and footers would typically be added as Layout boxes with text, dynamic content or images.

Basic Templates

A template may contain as many objects as you like - even data objects.

In this video tutorial you will see how to create a very basic template - just with a specific page size - and how to save and use it.

For templates to be available, they must be saved in a folder that has been designated as a *Templates folder*.

Templates with Placeholders

A *Placeholder* object is an object you can add to a document with the purpose of later replacing it with another object – e.g. a chart or a crosstab.

In this way, a Placeholder object works very well with templates. You can designate an area in your report that should later be replaced by a chart, a crosstab or any other type of object.

Scheduled Jobs: PDF report

All the documents you create and save – whether that is a dashboard or a report – can be opened by an end-user with a TARGIT client. In this way, the end-user can work interactively with the opened document.

However, sometimes you just need to be able to *send* the information to the end-users. Reasons could be that the end-users prefer it in this way or that the end-users don’t have access to TARGIT. Furthermore, it could be a kind of formal information that is required to be distributed on a regular basis.

For that purpose, TARGIT can work with *Scheduled jobs* to automate this type of information distribution.

Batch Scheduling

Batch Scheduling enables you to mass-distribute a report in different versions to different recipients. Simply enable the *Batch processing* option as part of the scheduled job and select a dimension to be used as batch filter and potentially as email distribution list at the same time.

The Batch processing will produce as many reports as you have dimension members (except the ones you may have actively disabled). Furthermore, each report will be filtered by a criterion matching each dimension member.

It is even possible to let the Batch Scheduled job send out emails automatically – one email with one matching report to each recipient. This part of the Batch process requires the dimension to be designed with an additional attribute containing email addresses.

Archive with file name Variables

You can add time stamps and dates to the file names that are produced from a scheduled job. In that way, you can create a daily, weekly etc. archive of your scheduled documents.

Schedule table data

You can schedule table data exports - to CSV or Excel - for individual tables, or for all objects within one document.

Agents: Monitor Value

You can set up TARGIT to keep an eye on data for you. Whenever the conditions are fulfilled, an email will be automatically send to you - informing you of the state of the monitored data.

In this way, you can rest assured that you will not miss any critical changes in your data. The data will be monitored by the system itself - and you will be notified when appropriate.

Agents: Monitor Object

Only real measures can be monitored as a Value. If you wish to set up monitoring agents to monitor client based calculations, you must set them up as *Object agents*.