

QUESTIONS LOG – CEWS – STUMP THE CONSULTANT – MAY 31, 2017

1. We budget by project and each project may have different start / end dates and may or may not match up with our fiscal year. What is the best way to make dynamic reports that the user may choose start / end dates depending on the project they are looking at, without having a report for each project.
 - a. This is difficult to answer without knowing a little more – but I will try my best! If you have projects with different start/end dates but your main pivot point is the project I would recommend keeping the time dimension at a very high level (such as all) and then the user goes in and chooses the project they wish to see. Either way it sounds like choosing a specific time member will be difficult for you based on how you report so I would recommend having the project be the main pivot point then using something like a member property to display the actual start and end date of the project for informational purposes.
2. Comment re: cell formatting. Prophix overrides number formatting (e.g. Currency format, (red) for credit values, etc
 - a. I don't think this is a question but is more of a comment. The main account number formatting is set in the Account Manager and this is how you see the data in Ad Hoc. Formatting for color (Red) is not available in the Account Number Formatting. It is possible to override that formatting in Template Studio, where it is possible to select negatives being Red.
3. But, you still need to connect via VPN with the web client?
 - a. You do not need a VPN to get into the web client in all cases. If you know the address of the Prophix server you should be able to place that address into google chrome and Prophix will start up. If you have issues/questions with this then I would recommend submitting a ticket to get a hand with this.
4. what is the difference between log in and connect when using the excel add in?
 - a. Log in will log you into Prophix – connect will allow you to choose the cube and data view you'd like to work with.
5. When I used named sets to define the columns in templates (reports), changes to the named sets often cause the entire report to need to be reformatted. This is not due to size of numbers. Not sure how to keep these reports dynamic utilizing named sets for columns that are usually time or time/version combinations. Is there any information available?
 - a. NameSets can be used in any dimension and it is difficult to explain all instances. If you're changing the members in that NameSet within the dimension, you shouldn't have formatting issues. If you're changing the actual named set itself (from current budget version to current reporting version or something like that) then yes you will lose formatting changes here. If you have more than one dimension and you are using unique combinations, then the use and updating of NameSets gets more challenging.
6. Is there any issue way to view templates that are used frequently, when switching between smart client and web client?

- a. The best solution we have right now is making sure frequently used templates are your “Favorites”. Prophix doesn’t track how often you use a report. Both the smart and web client have the favorite feature available.
7. Can we display a Boolean attribute (in DPM) in a check box format as opposed to a TRUE/FALSE selection?
 - a. A Boolean attribute is limited to 0/1 or True/False by it’s nature. You may want to create a list attribute or use and IF statement to change to format of the result.
8. Is it possible to create templates including standard reporting and line items details?
 - a. At this point in time, this functionality is not available. It may be possible to create a custom report in the Microsoft Reporting Services
9. Is there a way to format numbers in Versions? We have a version that calculates a % of sales, and when using ad hoc, the data view only returns blank cells or values of 1 in cells for that version. Would really like to show the % if possible.
 - a. The Account Manager Numeric Formatting sets the format for all versions. You could change it to show decimals or multiply the calculated version by 100 for more detail.
10. can advanced users schedule automatic posting to data cubes?
 - a. Yes, advanced users can set up and schedule processes
11. Can you explain what web client and smart client do?
 - a. Smart Client is when you log into Prophix from your desktop. Web client is available for Prophix 12 where you can log into Prophix using a browser like Chrome, Edge, etc. Web doesn’t mean cloud and all users of Prophix 12 may use the Web interface.
12. How do you use the dashboard studio? do you have to have dashboard analytics setup before using dashboard studio?
 - a. Dashboard studio is only available in the web client. First you need to set up the underlying data view you would like to use. Then open the dashboard studio application and insert the type of chart you’d like. Then, click on the settings icon of that chart to do your formatting. I’m not sure what you mean by dashboard analytics, the only applications you need are document explorer and dashboard studio. Then find your saved dashboard in document explorer to preview it!
13. If we have version 12 loaded, how do we get started on web client?
 - a. You need the correct web address, your IT team might know this or you can see this when you log in using the Smartclient before your user’s name. Then all you do is place that into chrome (recommended browser) and enter your windows credentials
14. is dpm available in webclient?
 - a. Coming soon!