



**ENTERPRISE DATA WAREHOUSE
PRODUCT PERFORMANCE
REPORTS USER GUIDE**

EXTERNAL

Version: 1.0

September 2004

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1.0 Overview

1.1 *Product Performance Overview*

The Product Performance Reports provide service and delivery performance information. These reports provide information regarding acceptance, receipt, processing and delivery of mail in the Postal distribution and delivery networks. The reports are available to both participating customers and internal Postal Users, providing a common view of performance.

1.2 *Enterprise Data Warehouse Overview*

The United States Postal Service (USPS) Enterprise Data Warehouse (EDW) provides a single repository for managing all of the Postal Service's data assets for reporting and analysis. The EDW provides a single source of accurate data across organizations to a wide variety of users. The data can be manipulated in a variety of ways and can lead to reduced costs and improved business practices.

1.3 *MicroStrategy Overview*

MicroStrategy is the reporting tool used to display and manipulate the data stored in the EDW. MicroStrategy software enables users to query and analyze detailed, transaction-level databases, turning data into business intelligence and delivering reports / alerts about the users' business process. MicroStrategy Web is the front-end portion of the Reporting software, which provides users with a highly interactive environment for building and analyzing reports. Some of the key features available through the MicroStrategy Web include:

- **Drilling:** This feature provides users the ability to view reports at different levels other than that of an original report. Users can select to view reports at either a high level or a low level of granularity. This feature also provides the ability to drill to additional detailed report view(s).
- **Page-by:** This feature allows users to select and display subsets of data as separate pages and is most useful for extremely long reports.
- **Sorting:** This feature allows users to sort data in ascending/descending mode.
- **Save Reports:** This feature allows users to save their reports, with or without their prompt answers, into their personal folders for easy access at a later time.
- **History List:** This feature adds the executing reports to the user's history list. Users can run multiple reports at the same time by running reports and clicking onto their history list for retrieval at a later time.
- **Concurrent Reporting:** This feature allows users to execute multiple reports at the same time. A user can begin one report, and then while that report is being built the user can go back and create another report. All reports will be available via the user's History List.

2.0 Getting Started

2.1 Obtaining Access through Mail Tracking & Reporting

Customers will access Product Performance Reports through the Mail Tracking & Reporting (MT&R) website. Customers will be required to register as a new user on the MT&R website if they do not have a valid username and password.

2.1.1 New Users: Request Access

Users: *Request Access Online*

1. Navigate to the MT&R by entering the following URL into your browser window:
<https://mailtracking.usps.com>
2. The MT&R Landing page displays. Click on *Product Performance*.

UNITED STATES POSTAL SERVICE® Home

National & Premier Accounts

- ▶ Mail Tracking & Reporting
 - Entry Information
 - Confirm
 - Product Performance
 - Delivery Confirmation
 - Signature Confirmation

Mail Tracking & Reporting

Get delivery status information - online!

Knowing the delivery status of your mailing or shipments can help improve the effectiveness of your communications, lower your costs, and improve customer satisfaction. The U.S. Postal Service® can provide you with this information through its Intelligent Mail services including:

- [Confirm@](#) service provides information on when the U.S. Postal Service receives your mail and when it is sorted on our automated processing equipment.
- [Delivery Confirmation™](#) and [Signature Confirmation™](#) services provide information on the delivery status of Priority Mail®, Package Services, First-Class Mail® parcels and Standard Mail parcels (for Delivery Confirmation only).
- [Product Performance Reports](#) provide service performance measurement for Package Services and parcels.
- [Entry Information](#) is a pilot program that provides information on when your mail was unloaded and accepted by the U.S. Postal Service.

Read our [Intelligent Mail Privacy Policy](#) about how your privacy is protected when you use Intelligent Mail services.

▶ **New Users**
Register now for Mail Tracking & Reporting [Sign Up >](#)

▶ **Existing Users**
Log on to Mail Tracking & Reporting [Sign In >](#)

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3. The Product Performance Landing page displays. Click on *Apply for Product Performance*

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National & Premier Accounts

Mail Tracking & Reporting

Entry Information

Confirm

▶ **Product Performance**

[Apply for Product Performance](#)

[Product Performance Resources](#)

[Product Performance FAQs](#)

[Contact Product Performance](#)

[Delivery Confirmation](#)

[Signature Confirmation](#)

Mail Tracking & Reporting

Product Performance Reports

Now it's easy to measure overall service performance for your packages.

When you use the [Delivery Confirmation™](#) or [Signature Confirmation™](#) service, you can receive service performance reports for Priority Mail®, Package Services (Parcel Performance), First-Class Mail® parcels, and Standard Mail parcels. Service reports are available down to the 5-digit ZIP Code™ level and can be rolled up by postal organization levels (e.g., to district, area, and national).

▶ **Service Measurement Reports**

- Provide the percent of pieces that met the delivery standards.
- Provide the percent of pieces delivered by day.
- Provide the option to sort data by the shipper's distribution center or consolidator (if a shipping partner is used).

▶ **Delivery Success Reports**

- Provide the percent of pieces delivered on first attempt.
- Provide the time between first attempt and delivery or pickup.

▶ **It's easy to participate**

- Prepare an electronic Confirmation Services file for the Delivery Confirmation and Signature Confirmation pieces for each mailing location. These files can be prepared by you or by the company entering the mail.
- Put a barcode of the file number on the entry documentation.

Details about participation are included on the [Apply for Product Performance Reports](#) page.

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4. The Apply for Product Performance Report page displays. Click *Sign Up* under New Users.

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Mail Tracking & Reporting

[Entry Information](#)

[Confirm](#)

Product Performance

[Apply for Product Performance](#)

[Product Performance Resources](#)

[Product Performance FAQs](#)

[Contact Product Performance](#)

Delivery Confirmation

Signature Confirmation

Mail Tracking & Reporting

Apply for Product Performance Reports

Application Process
In order to participate in Product Performance Reports:

Register online by clicking the Sign Up button.

- Complete a user profile (including user name and contact information).
- Search for the business to which you are associated or complete a Company Profile if your business is not already registered with USPS®.
- Select Mail Tracking & Reporting, then Product Performance Reports service.

Upon approval, the Postal Service™ will notify you of your Product Performance Reports User ID and Password.

New Users
 Register now for Mail Tracking & Reporting [Sign Up >](#)

Existing Users
 Log on to Mail Tracking & Reporting [Sign Up >](#)

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5. Enter New User Sign up information and click *Continue*.

New User Sign Up

Please fill in the following information: (* Required case-sensitive fields)

Create a Password

* Username Minimum 8 characters

* Password Minimum 8 characters

* Re-enter Password Minimum 8 characters

Password Hint

In case you forget your password, we'll ask you the question below.

* Question

* Answer

* Re-enter Answer

[Continue >](#)

Customer Support

If you need help or have questions about your account or the registration process, please contact Customer Support.

- * 1-800-238-3150 (Mon-Fri 7:00 AM - 5:00 PM Central)
- * incss@usps.gov

New Users: What to Expect

To sign up, you will:

- 1 Create a User Profile
- 2 Search for a Company (to be sure it is not already registered)
- 3 Select or Add a Company
- 4 Submit Your Request

Please note:
Registration does not give you immediate access. You will be contacted with your access information.

6. Enter User Profile information and click *Continue*.

User Profile

Please create your User Profile. This profile will allow you to access helpful business tools.
Please fill in the following information: (* Required case-sensitive fields)

Contact Information

* First Name	PPR	Middle Initial	
* Last Name	TEST		
* Address 1	901 D Street		
Address 2			
	Apt, floor, suite, etc.		
* City	Washington		
* State	Select One		
* ZIP Code™	22024		
* Country	UNITED STATES		
Home Phone			
	Use dashes, spacing or no spacing.		
* Business Phone	703 947 2000	Ext	
	Use dashes, spacing or no spacing.		
Fax Number			
	Use dashes, spacing or no spacing.		
* Email	PPRTEST@usps.gov		

We look forward to communicating with you about the USPS product or service you've selected.

Send me additional information about:

- Other USPS programs, products, or services
- Products or services of USPS partners that you may find of interest

PRIVACY ACT STATEMENT

The information you supply will be used to provide you online registration capability for Internet-based services, and to

[Continue >](#)

7. Review the User Profile Summary and edit if necessary (using the *Edit* button) or click *Continue*.

User Profile Summary

Please review the user information below. If you need to edit this information, select *Edit* below.

User Account Information

Username **pprtest_01**

User Profile Information

First Name **PPR**
Last Name **TEST**
Address 1 **901 D ST**
City **WASHINGTON**
State **District of Columbia(DC)**
ZIP Code™ **22024**
Country **UNITED STATES**
Business Phone **703 947 2000**
Email **PPRTEST@usps.gov**

Communication Preferences

Other USPS programs, products, or services
 Products or services of USPS partners that you may find of interest

[Edit >](#) [Continue >](#)

8. Search for your company by entering your company name and clicking the *Search* button.

Company Search

Please take a moment to run a search.
Help us validate your registration by searching our records for your company. If it does not appear, you will have the opportunity to add it.

Enter Your Company Name Below

Note: Please enter your company's official name. Do not use abbreviations or special characters.
[Why is this necessary?](#)

Search for a Company

Company Name Enter company name

Search >

< Back

9. If your company name does appear, select the company. If you do not see your company, click on *Add Company* and enter company information.

Company Search Results

Please review your search results below. Click Select Company next to a company's name to submit a request for access.

You searched for '123', Search Results: (2 Total)

Select a Company

If your company is not listed, please search again or click Add Company at the bottom of this page. [Why is this necessary?](#)

Test05123

Select Company >

Test123

Select Company >

Total: 2 Companies

Search Again 123

Search >

Add a Company

If you don't see your company listed above, you can submit a request for access now.

Add Company >

< Back

10. Search for your company address and click on *Select This Address* if company address exists. If company address does not exist, add a company address by clicking *Add Address*.

Company Address

Please choose a company address.

Addresses for 'Test05123': (2 Total)

Select an Address for Your Company

If your address is not listed, click Add Address at the bottom of this page.
[Why is this necessary?](#)

23 TEST WAY, TEST, AZ 30344	Select This Address >
34 REST WAY, TEST, AZ 03022	Select This Address >

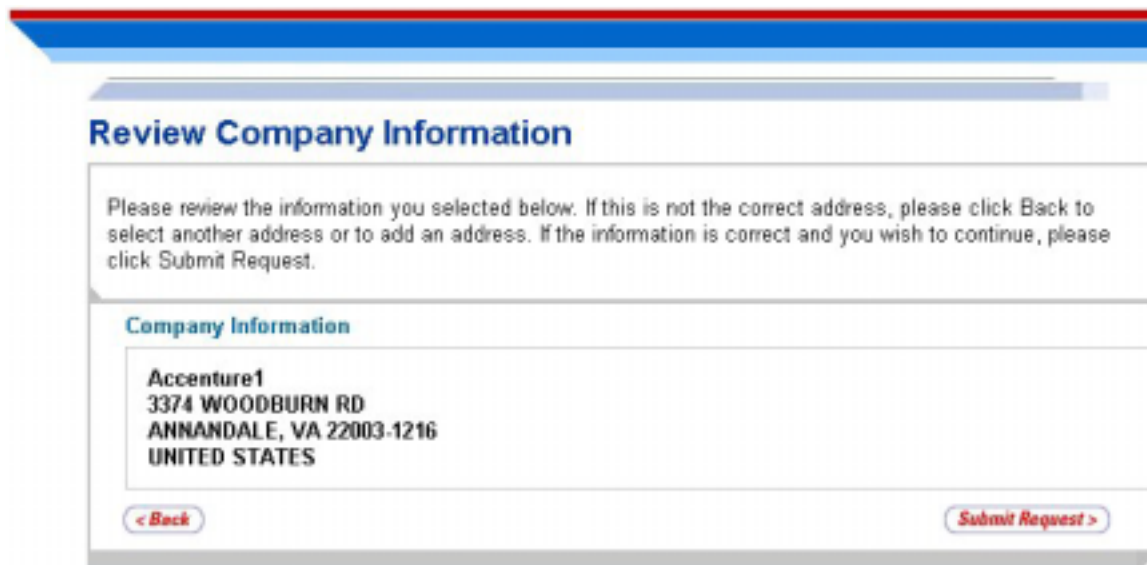
Total: 2 Addresses

Add a Company Address

If your company address is not listed above, you can add it now. [Add Address >](#)

[< Back](#)

11. Review Company Information and edit if necessary using the *Back* button or click *Submit Request*.



Review Company Information

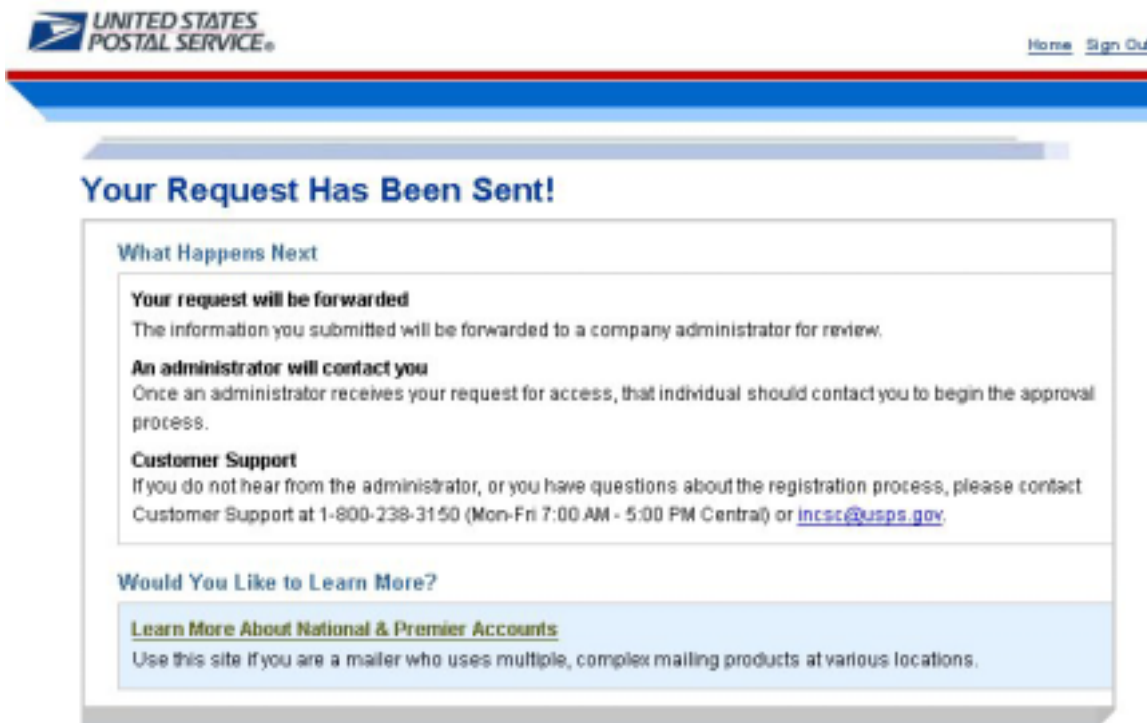
Please review the information you selected below. If this is not the correct address, please click Back to select another address or to add an address. If the information is correct and you wish to continue, please click Submit Request.


Company Information

Accenture1
3374 WOODBURN RD
ANNANDALE, VA 22003-1216
UNITED STATES

[< Back](#) [Submit Request >](#)

12. A confirmation screen noting that your request has been sent will display.



 [Home](#) [Sign Out](#)

Your Request Has Been Sent!

What Happens Next

Your request will be forwarded
The information you submitted will be forwarded to a company administrator for review.

An administrator will contact you
Once an administrator receives your request for access, that individual should contact you to begin the approval process.

Customer Support
If you do not hear from the administrator, or you have questions about the registration process, please contact Customer Support at 1-800-238-3150 (Mon-Fri 7:00 AM - 5:00 PM Central) or incsc@usps.gov.

Would You Like to Learn More?

[Learn More About National & Premier Accounts](#)
Use this site if you are a mailer who uses multiple, complex mailing products at various locations.

NOTE: Registration does not give immediate access. Upon approval the Postal Service will contact you with a username and password. If you do not hear from the administrator, or have questions about the registration process, please contact Customer Support at 1-800-238-3150 (Mon – Fri 7:00 AM – 5:00 PM Central) or incsc@usps.gov.

2.1.2 Existing Users: Logging into the Application

Users with a valid user name and password can access the Product Performance Reports by following the steps below.

1. Navigate to MT&R by entering the following URL into your browser window:
<https://mailtracking.usps.com>
2. The MT&R Landing page displays. Click on *Product Performance*.

The screenshot shows the USPS Mail Tracking & Reporting landing page. At the top left is the USPS logo. A navigation menu on the left includes 'National & Premier Accounts', 'Mail Tracking & Reporting', 'Entry Information', 'Confirm', 'Product Performance', 'Delivery Confirmation', and 'Signature Confirmation'. The main content area is titled 'Mail Tracking & Reporting' and features a sub-header 'Get delivery status information - online!'. Below this, a paragraph explains that knowing delivery status helps improve communication effectiveness, lower costs, and improve customer satisfaction. A list of services follows: 'Confirm' (mail arrival and sorting), 'Delivery Confirmation' and 'Signature Confirmation' (delivery status for various mail services), 'Product Performance Reports' (service performance measurement), and 'Entry Information' (pilot program for mail unloading). A 'Sign Up' box on the right offers options for 'New Users' (register) and 'Existing Users' (log on). The footer contains links for 'Postal Inspectors', 'Site Map', 'Contact Us', 'Government Services', 'Jobs', and 'National & Premier Accounts', along with copyright information (© 1995-2004 USPS) and links to 'Terms of Use' and 'Privacy Policy'.

3. The Product Performance Reports Landing page displays. Click on the *Apply for Product Performance*.

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Mail Tracking & Reporting

Entry Information

Confirm

Product Performance

Apply for Product Performance

Product Performance Resources

Product Performance FAQs

Contact Product Performance

Delivery Confirmation

Signature Confirmation

Mail Tracking & Reporting

Product Performance Reports

Now it's easy to measure overall service performance for your packages.

When you use the [Delivery Confirmation™](#) or [Signature Confirmation™](#) service, you can receive service performance reports for Priority Mail®, Package Services (Parcel Performance), First-Class Mail® parcels, and Standard Mail parcels. Service reports are available down to the 5-digit ZIP Code™ level and can be rolled up by postal organization levels (e.g., to district, area, and national).

Service Measurement Reports

- Provide the percent of pieces that met the delivery standards.
- Provide the percent of pieces delivered by day.
- Provide the option to sort data by the shipper's distribution center or consolidator (if a shipping partner is used).

Delivery Success Reports

- Provide the percent of pieces delivered on first attempt.
- Provide the time between first attempt and delivery or pickup.

It's easy to participate

- Prepare an electronic Confirmation Services file for the Delivery Confirmation and Signature Confirmation pieces for each mailing location. These files can be prepared by you or by the company entering the mail.
- Put a barcode of the file number on the entry documentation.

Details about participation are included on the [Apply for Product Performance Reports](#) page.

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4. The Product Performance Reports page displays. Click on *Sign In* under *Existing Users*.

The screenshot shows the USPS website's 'Mail Tracking & Reporting' section. The header includes the USPS logo and a 'Home' link. A left-hand navigation menu lists various services, with 'Product Performance' selected. The main content area is titled 'Mail Tracking & Reporting' and 'Apply for Product Performance Reports'. It features an 'Application Process' section with instructions and a list of steps. A right-hand box contains 'New Users' and 'Existing Users' options, each with a 'Sign Up' or 'Sign In' button. The footer contains links for 'Postal Inspectors', 'Site Map', 'Contact Us', 'Government Services', 'Jobs', and 'National & Premier Accounts', along with copyright information.

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Mail Tracking & Reporting
Apply for Product Performance Reports

Application Process
In order to participate in Product Performance Reports:
Register online by clicking the Sign Up button.

- Complete a user profile (including user name and contact information).
- Search for the business to which you are associated or complete a Company Profile if your business is not already registered with USPS®.
- Select Mail Tracking & Reporting, then Product Performance Reports service.

Upon approval, the Postal Service™ will notify you of your Product Performance Reports User ID and Password.

New Users
Register now for Mail Tracking & Reporting [Sign Up >](#)

Existing Users
Log on to Mail Tracking & Reporting [Sign In >](#)

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5. Enter your username and password and click *Sign In*.

UNITED STATES
POSTAL SERVICE®

Home Sign In

Existing User Sign In

Please fill in the following information: (* Required case-sensitive fields)

Enter User Information

* Username Minimum 8 characters

* Password Minimum 8 characters, at least 1 uppercase and 1 lowercase

[I forgot my password](#)

Edit/View my profile

[Sign In >](#)

New User? Register Now

Registration is easy. By taking a few minutes now, you'll be on your way to gaining access to valuable USPS® online services designed to help you manage your mailing needs more effectively.

[Sign Up >](#)

Customer Support

If you need help or have questions about your account or the registration process, please contact Customer Support.

- * 1-800-238-3150 (Mon-Fri 7:00 AM - 5:00 PM Central)
- * incc@usps.gov

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6. Upon logging into MT&R, the MT&R Welcome Page displays. Click the *Product Performance* link.

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- ▶ Mail Tracking & Reporting
 - [Entry Information](#)
 - [Confirm](#)
 - [Product Performance](#)
 - [Delivery Confirmation](#)
 - [Signature Confirmation](#)
 - [Administration](#)
 - [Reports](#)
 - [Sign Out](#)

Mail Tracking & Reporting

Welcome!

Quickly access your options for setup, file transmission and reports.

Your account is set up for Product Performance Reports.

▶ **Reports**

- [Product Performance](#)

7. The EDW screen displays as shown below. Click on Product Performance Reporting link to access reports.

UNITED STATES POSTAL SERVICE

Enterprise Data Warehouse

Product Performance Reporting
Server name: FTS4001-PRCO

This site is brought to you by your Information Systems organization.
Restricted Information
Copyright © 1994-2000 MicroStrategy Incorporated. All rights reserved. Confidential.

2.2 Logging out of the Application

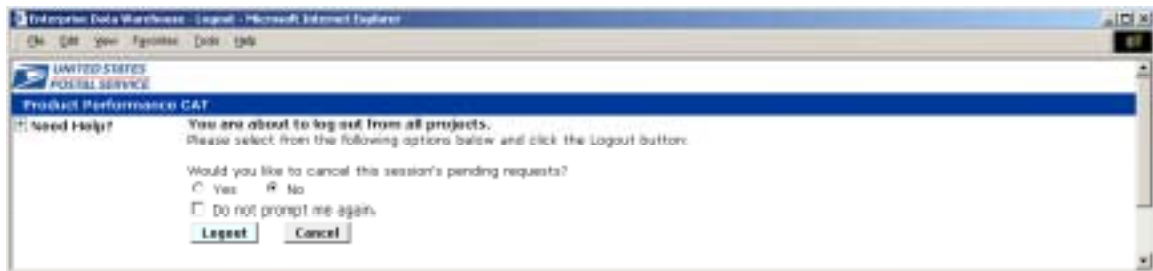
Once you are finished with your Product Performance session, you can log out of the system by using either of the following two methods shown below.



Use either of the following methods to logout from the Home screen.

1. Click the **Logout** tab, OR
2. Click the **Logout** link.

The following screen will appear and ask you to make a decision about any pending reports that may be generating.



Selecting **Yes** will cancel the requests and selecting **No** will allow the reports to continue generating. Reports that are not cancelled will automatically be placed in the History folder for you to view the next time you log in.

3.0 Reviewing System Folders

3.1 *Product Performance System Overview*

After you access the Product Performance Business Area, the Home screen displays a variety of folders that you can access. The available folder options are:

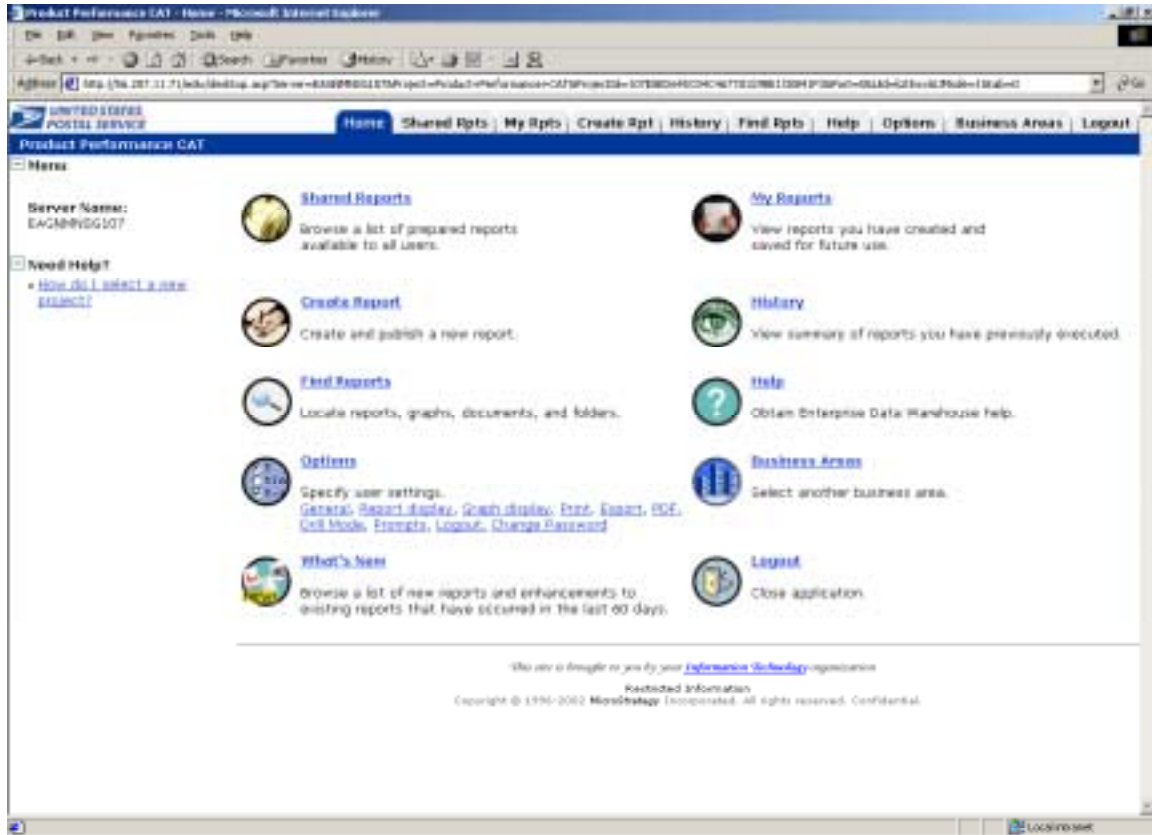
- Shared Reports
- My Reports
- History
- Find Reports
- Help
- Options
- Business Areas
- What's New
- Logout

All of these options can be accessed by clicking on the corresponding links. All (except **What's New**) can also be accessed by the tabs at the top of the screen.

3.2 System Folders

3.2.1 Home Folder

The **Home** folder is the main menu screen that presents links to all options available for your use.



3.2.2 Shared Reports Folder

The **Shared Reports** folder contains all canned Product Performance reports and folders that are available. This area is used for sharing reports with users. Users can run reports that have been created here, but will not be able to save their own reports here. The report folder structure will be familiar to most users of Windows-based programs.

The folders and reports are represented by these icons in the Shared Reports Folder.



Folder Icon



Report Icon

3.2.3 Shared Reports Descriptions

The following reports are available under the Shared Reports tab:

- **Delivery Success (Customer Data)** – This report provides information on how many days passed between the first attempted delivery of a mailpiece and when it was picked up.
- **Cumulative Delivery Success (Customer Data)** – The cumulative version of this report includes attributes similar to the Delivery Success report, except that the data in each day's column includes the pieces redelivered/picked up in the previous day.
- **Days to Deliver (Customer Data)** – This report provides service information from originating locations by on time percentage and percentage delivered by day. This report provides details on volume, volume within standard and volume delivery from day one through 8 or more days.
- **Cumulative Days to Deliver (Customer Data)** – The cumulative version of this report contains attributes similar to the Days to Deliver (Customer Data) except that the data in each day's column includes the pieces delivered in the previous days.
- **Days to Deliver – Parcel Select (Customer Data)** – This report provides service information from originating Bulk Mail Centers to Destination Delivery Units by on time percentage and percentage delivered by day.
- **Cumulative Days to Deliver – Parcel Select (Customer Data)** - The cumulative version of this report contains attributes similar to the Days to Deliver – Parcel Select (Customer Data) report except that the data in each days' column includes the pieces delivered in the previous day.

3.2.4 My Reports Folder

All reports that you choose to save are placed in the My Reports folder. This is the default location for saving reports that you create. You can either save reports directly in this folder or save your reports in subfolders that you create within the My Reports Folder.



3.2.5 History Folder

The History List displays messages about the reports and documents that you have run or scheduled in MicroStrategy Web. Once a report is generated, it is automatically placed in the History Folder. There are a maximum number of 25 reports that can be kept in the History Folder, so it is important to remove unwanted reports, including ones that are in “Ready”, “Waiting for Prompts”, “Error”, or “Executing SQL” status. Retrieving reports from the History Folder will be quicker than running them again from scratch as the data is pre-saved.


Return to report: [Delivery Success \(Customer Data\)](#)

Name	Status	Created	Details	Remove
Delivery Success (Customer Data)->Destination District	Executing SQL	8/12/2004 9:58:52 AM		<input type="checkbox"/> Delivery Success (Customer Data)->Destination District
Delivery Success (Customer Data)->Destination District	Executing SQL	8/12/2004 9:58:27 AM		<input type="checkbox"/> Delivery Success (Customer Data)->Destination District
Days to Deliver - Parcel Select (Customer Data)	Ready	8/10/2004 2:15:09 PM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)
Delivery Success (Customer Data)	Ready	8/11/2004 12:33:52 PM		<input type="checkbox"/> Delivery Success (Customer Data)
Days to Deliver - Parcel Select (Customer Data)->Shipper Location	Ready	8/11/2004 12:31:22 PM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)->Shipper Location
Days to Deliver - Parcel Select (Customer Data)	Ready	8/10/2004 2:15:09 PM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)
Days to Deliver - Parcel Select (Customer Data)->Destination ZIP-3	Ready	8/10/2004 11:23:17 AM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)->Destination ZIP-3

* Message Creation Time
Sort list: Click on the column title that you wish to sort.

You will see the total number of reports in the History folder under the **History List Description** on the left (In the example above, the total is 8). Product Performance does not utilize EDW Flash reports at this time so the number of documents will always be 0 (as seen in the example above). A description of all the history column headings is described below.

3.2.5.1 History Folder Descriptions

1. **Name:** This column lists the report title links.
2. **Status:** This column indicates whether a report has been completely run, whether any errors have occurred while generating the report, and whether a user has read a report. When a report is listed as “Ready”, you may view it by clicking the report name.
3. **Created:** This column lists the date and time that the report was generated.
4. **Details:** Click on the icon to display detailed information of the report, which may be of particular use to system and help desk personnel. When you click the “Information” icon  in the Details column, you can view the filter criteria, status, the time at which the request was executed, and other identifying information.
5. **Remove:** This column contains check boxes used to mark individual reports for permanent removal from the History folder.

3.2.5.2 Remove a Report from the History Folder

You can easily delete a report from the History Folder by following the steps below:



Name	Status	Created	Details	Remove
Delivery Success (Customer Data)->Destination District	Executing SQL	8/12/2004 9:58:53 AM		<input type="checkbox"/> Delivery Success (Customer Data)->Destination District
Delivery Success (Customer Data)->Destination District	Executing SQL	8/12/2004 9:58:27 AM		<input type="checkbox"/> Delivery Success (Customer Data)->Destination District
Days to Deliver - Parcel Select (Customer Data)	Ready	8/10/2004 2:15:09 PM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)
Delivery Success (Customer Data)	Ready	8/11/2004 12:32:52 PM		<input type="checkbox"/> Delivery Success (Customer Data)
Days to Deliver - Parcel Select (Customer Data)->Shipper Location	Ready	8/11/2004 12:31:02 PM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)->Shipper Location
Days to Deliver - Parcel Select (Customer Data)	Ready	8/10/2004 2:15:09 PM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)
Days to Deliver - Parcel Select (Customer Data)->Destination ZIP-3	Ready	8/10/2004 11:23:17 AM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)->Destination ZIP-3

1. Click the check box in the **Remove** column for the report that you want to delete. A checkmark will appear in the box.
2. Click the **Remove** button.

A check mark will automatically appear for all reports with “**Error**” or “**Waiting for Prompt**” status messages. Clicking the “**Clear my History List**” link will permanently remove all reports at once.

3.2.5.3 History List Extras

Additional history features are available. They include options such as refreshing or clearing your history list.

Return to report: [Delivery Success \(Customer Data\)](#)

Name	Status	Created	Details	Remove
Delivery Success (Customer Data)->Destination District	Executing SQL	8/12/2004 9:58:52 AM		<input type="checkbox"/> Delivery Success (Customer Data)->Destination District
Delivery Success (Customer Data)->Destination District	Executing SQL	8/12/2004 9:58:27 AM		<input type="checkbox"/> Delivery Success (Customer Data)->Destination District
Days to Deliver - Parcel Select (Customer Data)	Ready	8/10/2004 2:15:09 PM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)
Delivery Success (Customer Data)	Ready	8/11/2004 12:32:52 PM		<input type="checkbox"/> Delivery Success (Customer Data)
Days to Deliver - Parcel Select (Customer Data)->Shipper Location	Ready	8/11/2004 12:31:22 PM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)->Shipper Location
Days to Deliver - Parcel Select (Customer Data)	Ready	8/10/2004 2:15:09 PM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)
Days to Deliver - Parcel Select (Customer Data)->Destination ZIP-3	Ready	8/10/2004 11:23:17 AM		<input type="checkbox"/> Days to Deliver - Parcel Select (Customer Data)->Destination ZIP-3

* Message Creation Time
Sort list: Click on the column title that you wish to sort.

To refresh or clear your History List follow the steps below:

1. Click the **“Refresh my History List”** link to refresh the status of reports in the History folder. All reports marked for removal will be removed.
2. Click the **“Clear my History List”** link to remove **ALL** reports from the History folder. Once removed, they **CANNOT** be retrieved.

3.2.5.4 History Maintenance

There are a maximum number of 25 reports that can be stored in your History Folder. It is important that you frequently remove unwanted or unneeded reports.

3.2.5.5 History Icons

The icons in the History folder and their descriptions are as follows:

**Information Icon**

This icon allows you to view additional information about the report. This information may be helpful for diagnosing problems.

**Error Icon**

This icon indicates there is a report error (not necessarily a server error). Click on the information icon for details.

**Grid Icon**

This icon identifies the format of the report.

**Wait Icon**

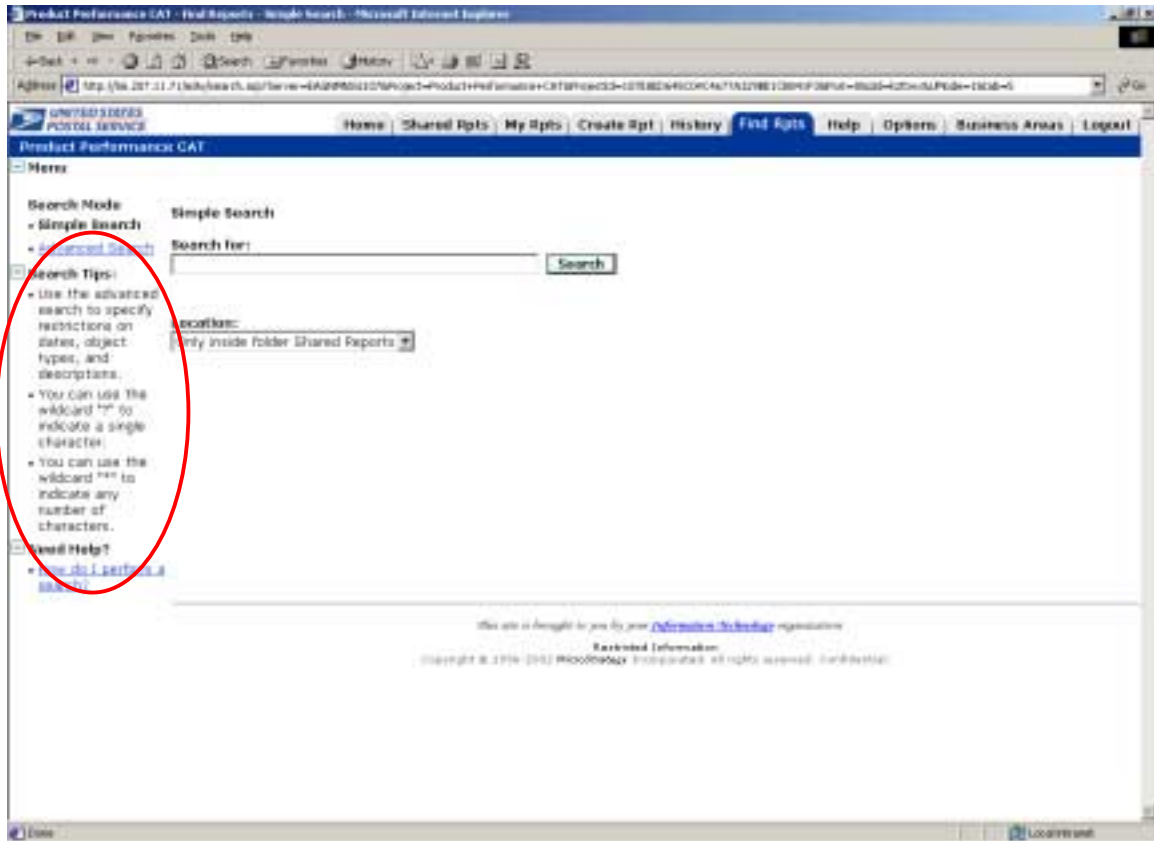
This icon indicates that the system is generating a report or that it is waiting for a prompt at the Auto-prompt screen to be completed. The status column will indicate the type of wait.

NOTE: It is important to complete or cancel the execution of wait prompts so that they do not slow down the system.

3.2.6 Find Reports Folder

Use the Find Reports folder to locate specific reports and folders. **Search Tips** are available in the left menu as guidelines to assist you when searching for a report link and include:

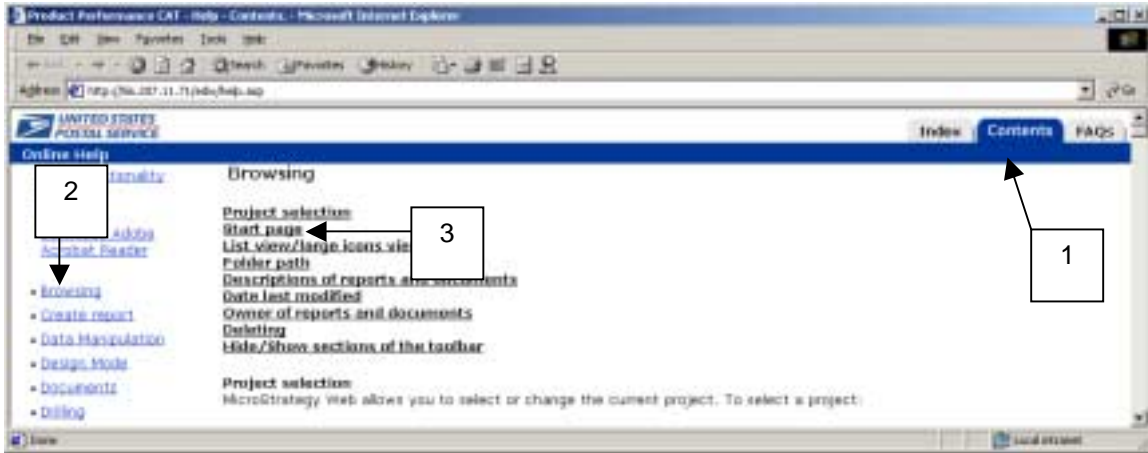
1. Using the advanced search to specify restrictions on dates, object types and descriptions
2. Using the wildcard? to indicate single character
3. Using the wildcard *** to indicate any number of characters



3.2.7 Help Folder

The Help Folder opens a separate browser window for online help. All three tabs at the top - **Index**, **Contents**, and **FAQs** - will assist you in getting information on various topics.

NOTE: Since online help opens in a separate browser window, you will need to close that window to return to Product Performance Business Area.



3.2.7.1 Content Tab

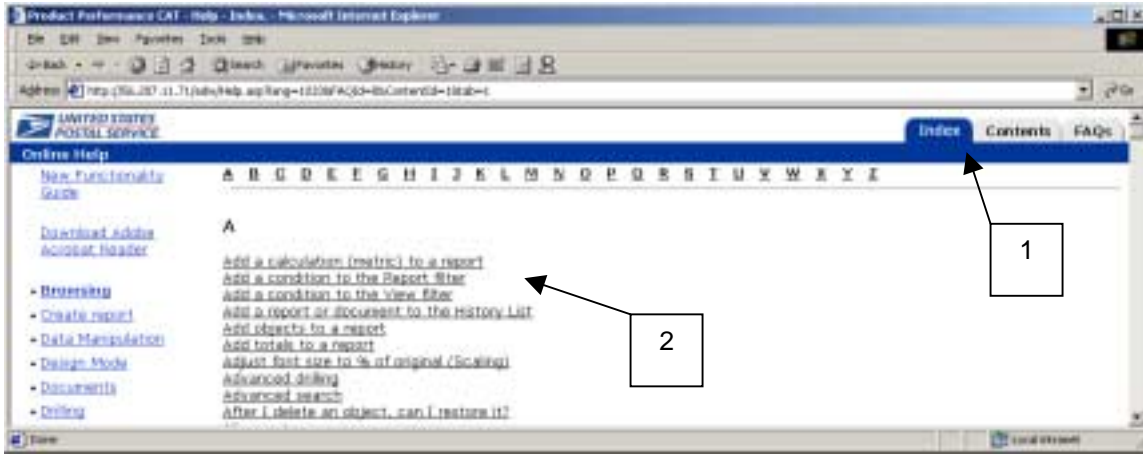
The Contents tab groups all of the help topics by subject.

As an example, use the following steps to display information on how to change the start page.

1. Click on the **Contents** tab.
2. Select the **Browsing** link on the left side on the screen. All of the topics that relate to the selected link will be displayed.
3. Click on the **Start page** link to view information on the topic. The steps for changing the start page will be displayed.

3.2.7.2 Index Tab

The **Index** tab allows you to search for help topics by using the hyperlinked letters at the top of the screen as shown below.



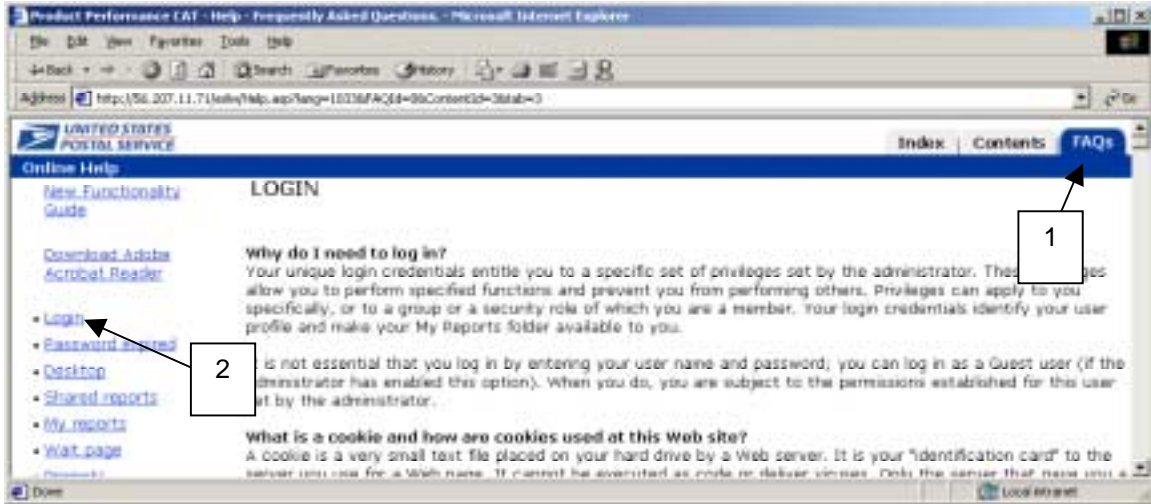
You can also search for help topics using the following steps to display information on documents:

1. Click on the **Index** tab.
2. Click on the **Documents** link on the left hand side.

All information related to documents will be displayed.

3.2.8 FAQs Tab

The **FAQs** tab provides a list of “Frequently Asked Questions” which include the most commonly misunderstood topics in MicroStrategy.



As an example, use the following steps to obtain questions and responses regarding **Login**:

1. Click on the **FAQs** tab.
2. Click on the **Login** link.

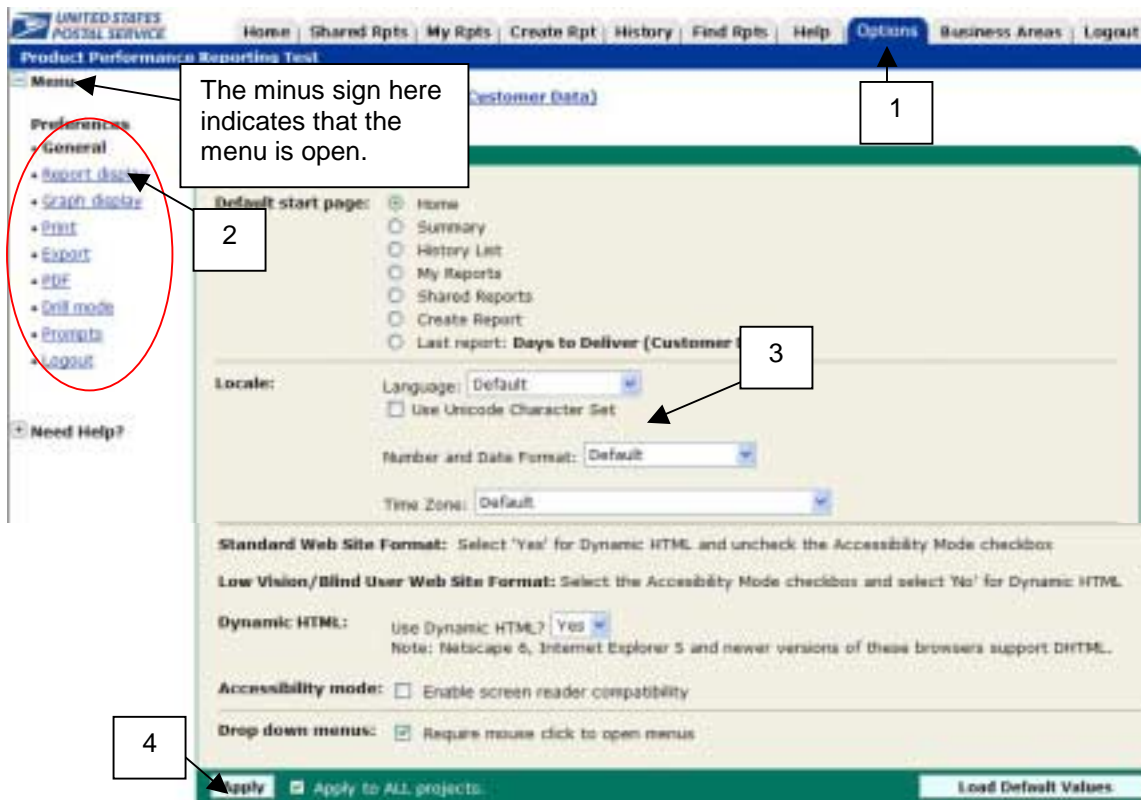
Login questions and answers are displayed.

3.2.9 Options Folder

Access the **Options** Folder to change your user account preferences for report display, exporting, printing and more. Options are your master default lists for all future created reports. You may change the default settings for the following:

- General
- Report display
- Graph display
- Print
- Export
- PDF
- Drill mode
- Prompts
- Logout

The following example explains the steps required to make changes in the Preferences option.



1. Click on the **Options** tab.
2. Click on the link in the left menu for one of the preferences that you would like to change.
3. Make the desired changes in the field provided.
4. Click the Apply button. Apply must be clicked in order for the changes to be accepted.

3.3 Changing Preferences

3.3.1 Changing the Folder View

The View Mode option located in the left menu allows you choose a view: **Large Icons** or **List**. Both provide the same information.

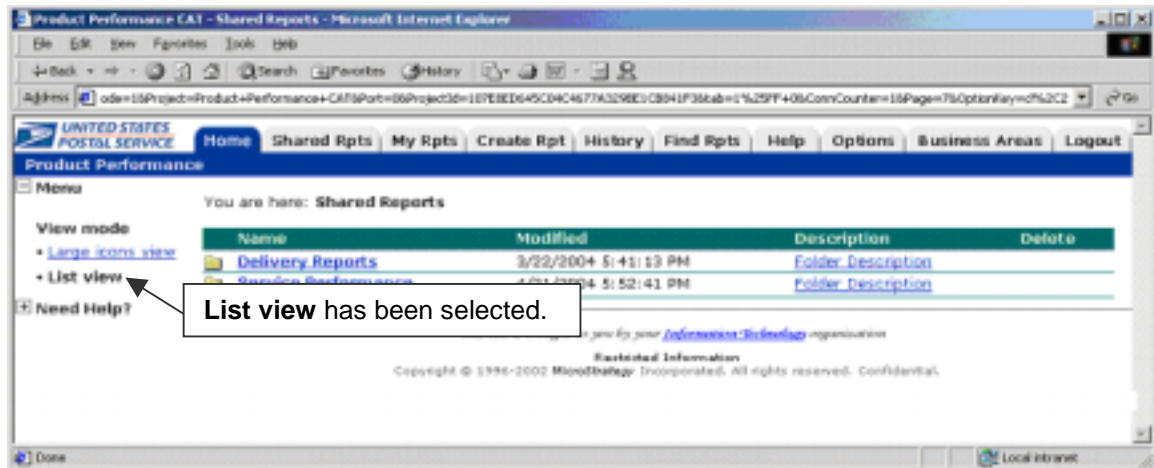
3.3.1.1 Large Icons View

The Large icon view displays folder and report links with large picture icons next to them for quick visual recognition. The **Large Icon view** is shown below.



3.3.1.2 List View

The **List view** displays a vertical listing of the folder contents with smaller icons.

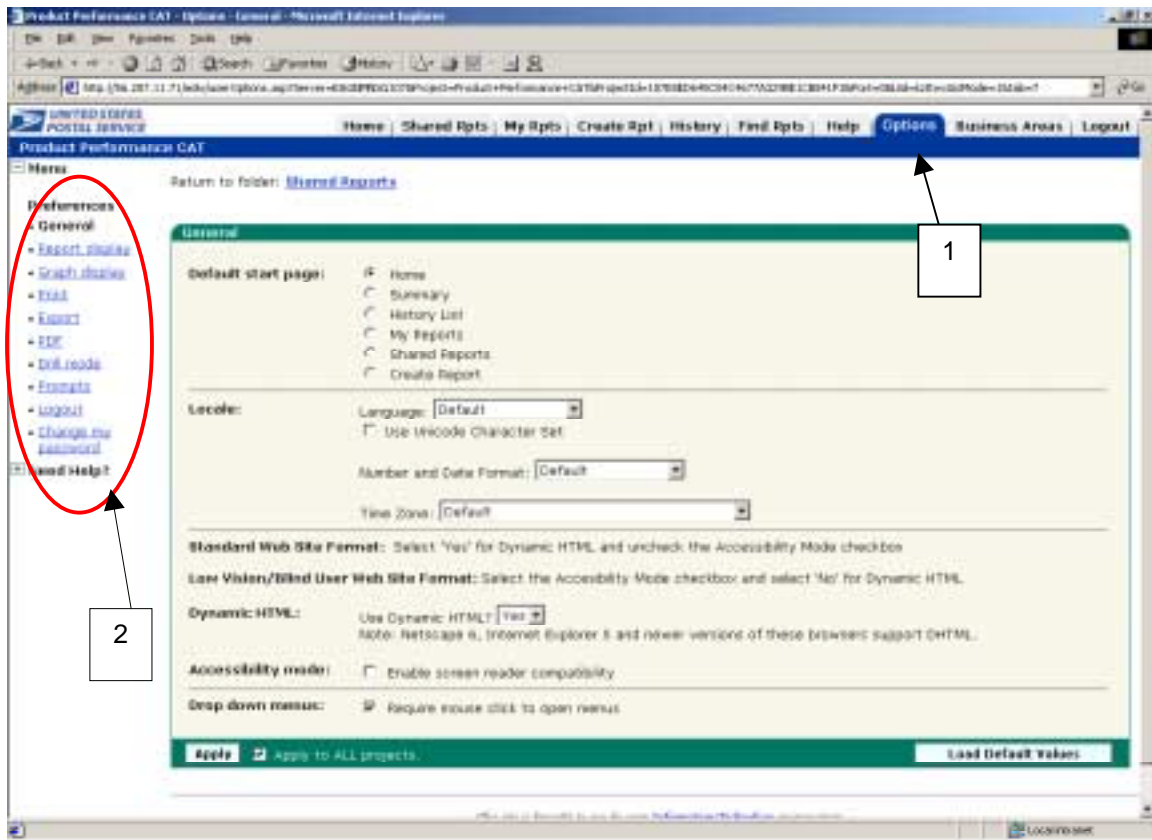


3.3.2 Changing User Preferences

Access the **Options** Folder to change your Product Performance password and default preferences. You may change the default settings for:

- General
- Report display
- Graph display
- Print
- Export
- PDF
- Drill mode
- Prompts
- Logout

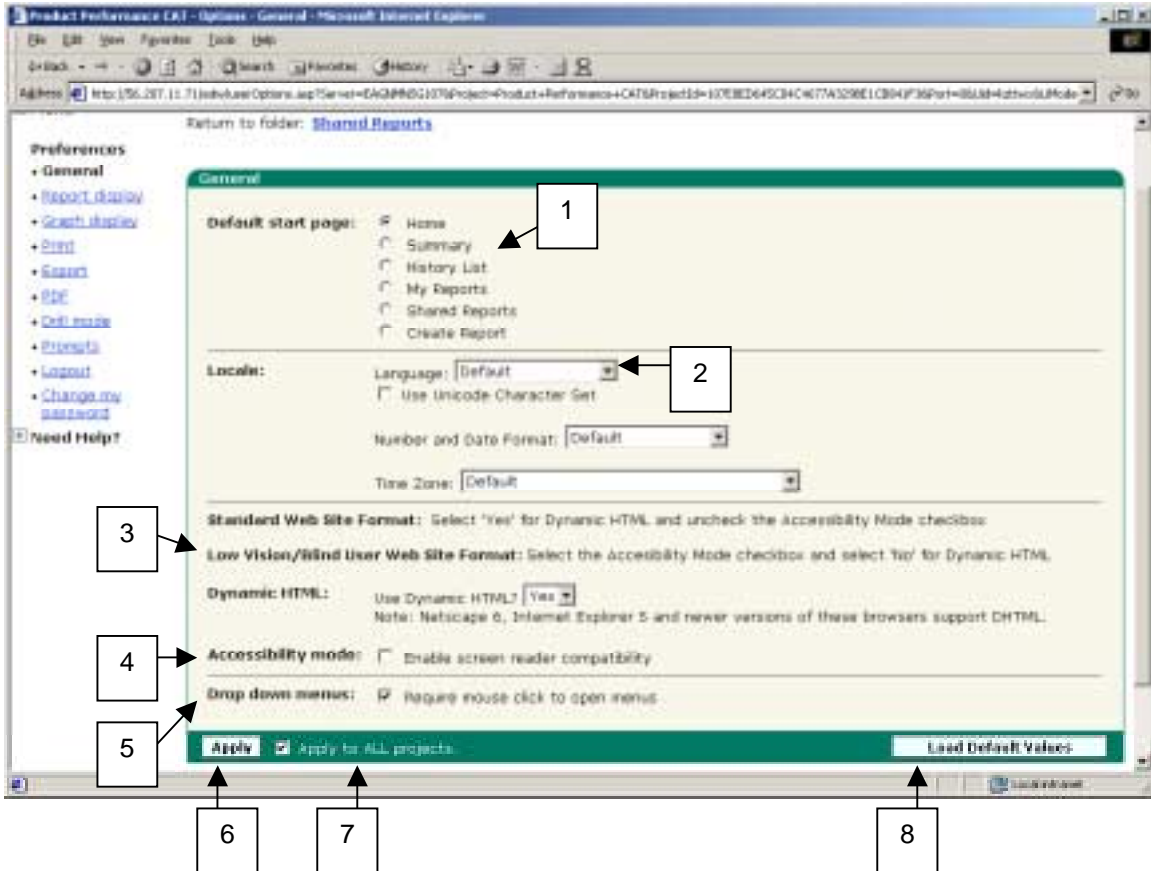
The following example explains the steps required to access the different Preferences.



1. Click on the **Options** tab.
2. Click on the link in which you wish to make changes.

3.3.2.1 General Preferences

Clicking the General link in the left menu will show the following screen:



1. **Default start page** - Use this menu to select your Product Performance start page from six available options listed. Home is the default selection.
2. **Locale** - Use the drop-down menu to select one of 10 language choices. Screen instructions, Auto-prompts and Help files will be displayed in the language that you select; however, report titles and column headings are not affected.
 - Use Unicode Character Set – If the data in your data warehouse is stored in Unicode, check the box.
 - Number and Date Format – Use this menu to select the language for numbers and dates.
 - Time Zone – Use this menu to select the time zone.
3. **Dynamic HTML** - Use Dynamic HTML? – Use this menu to select Yes or No. Netscape 6, Internet Explorer 5 and newer versions support dynamic HTML. The default for this option is Yes. This allows the application to select the appropriate choice according to the configuration of your PC.
4. **Accessibility mode** - Allows you to enable screen reader capability if you use software that audibly reads what is on the page.
5. **Drop-down menus:** Allows you to select whether or not to require a mouse click to display the drop-down menu. By checking the box, you will need to click the drop-down arrow to display

the contents of the menu. By de-selecting the check box, the drop-down menus in reports will display simply by rolling the mouse over the menu. The box is checked as the default setting.

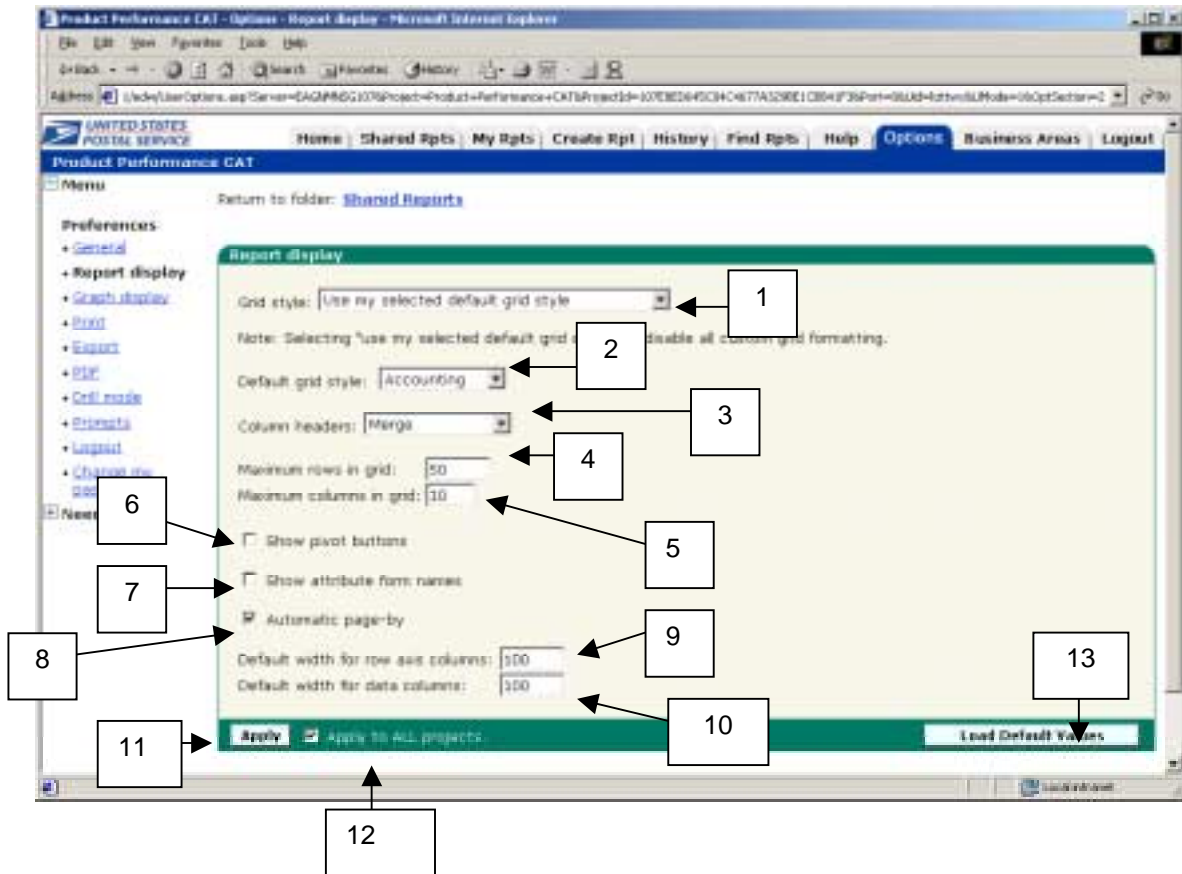
6. **Apply** – After you finish making changes, click the Apply button to save your changes in the system.

7. **Apply to ALL projects** – The check box is selected as the default setting; however, this function applies only when multiple databases are present.

8. **Load Default Values** – This button resets the system defaults for this screen.

3.3.2.2 Report Display Preferences

Clicking the Report Display link in the left menu will show the following screen:

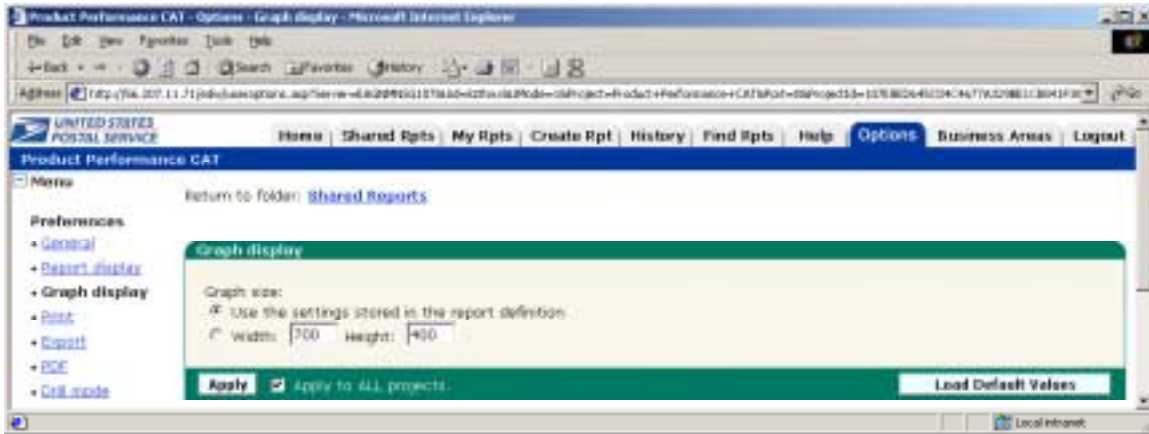


1. **Grid Style** – This menu provides two options: “Use the format stored in the report definition” (default) or “Use my selected default grid style.” If you choose to use a selected grid style, you will not be able to make formatting changes to any reports that you generate.
2. **Default grid style** – Select one of 14 grid styles to change the color and appearance of your screens.
3. **Column headers** – Choose to either **Merge** (default) any column headers that are repeated in the report. Otherwise, select **Repeat** to allow all duplicate column headers to be displayed.
4. **Maximum rows in grid** – Choose a number to indicate the maximum number of rows that will display on each page of a grid report screen. The default is 50.
5. **Maximum columns in grid** – Represents the maximum number of metrics column (columns to the right of the metrics label) that will appear on each page of a grid report. The default is 10.
6. **Show pivot buttons** – Check the box if you want pivot buttons to show automatically. The default is unchecked.

7. **Show attribute form names** – Allows you to display the name of the attribute form associated with each attribute. The default is unchecked.
8. **Automatic Page By** – Uncheck the box if you want to select a “GO” button when using the Page By feature. Otherwise, once you make a selection from the drop-down menu from the Page By feature, the system will automatically display the data.
9. **Default width for row axis columns** – Allows you to set the default width to be used for any columns that are added to a report after the column widths have been set.
10. **Default width for data columns** – Allows you to set the default width to be used for any data columns that are added to a report after the column widths have been set using resize columns and rows feature.
11. **Apply** – When you have made your changes, click the Apply button to save them.
12. **Apply to ALL projects** – The check box is selected as the default setting.
13. **Load Defaults Values** – This button resets the system default values for this screen.

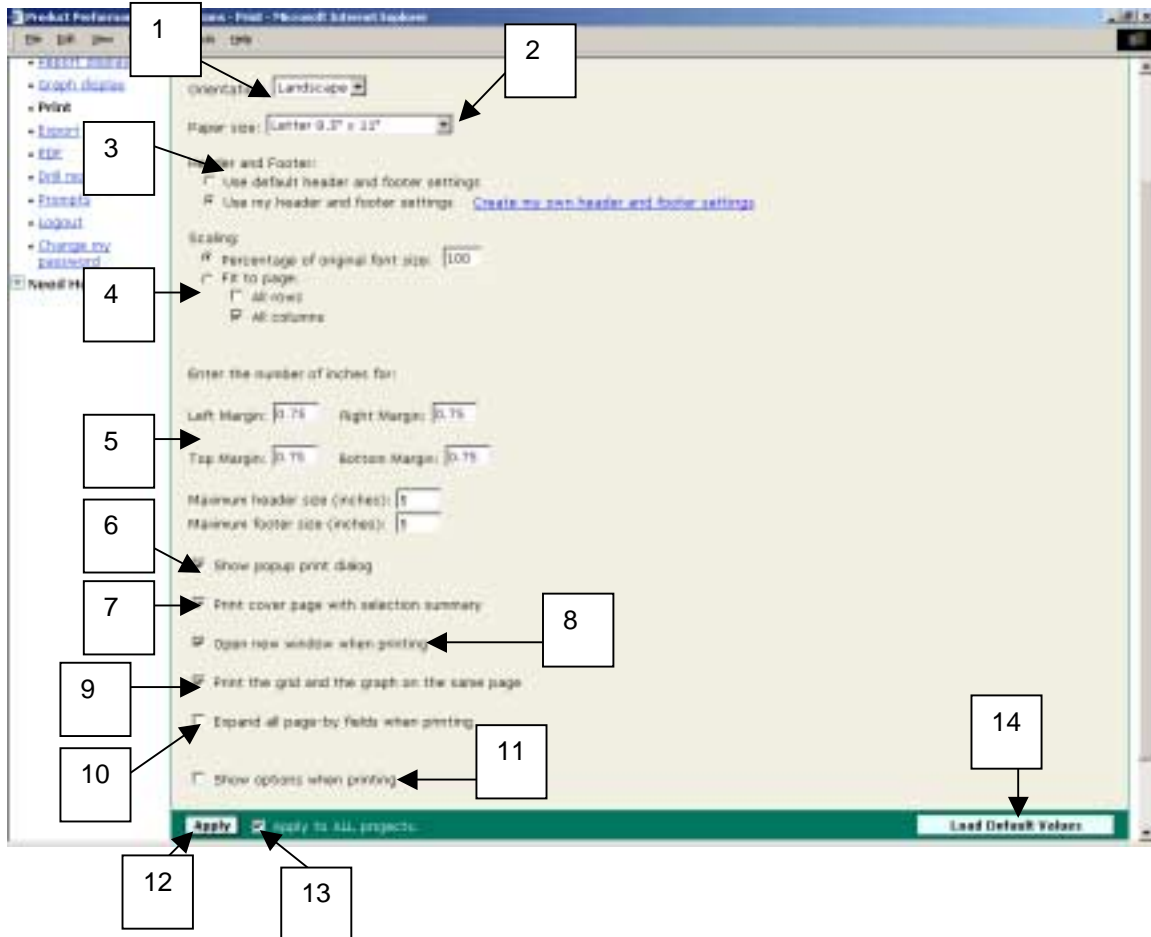
3.3.2.3 Graph Display Preferences

This preference is not utilized by the Product Performance Business Area. None of the current reports display in graph format at this time.



3.3.2.4 Print Preferences

Clicking the Print link in the left menu will show the following screen:

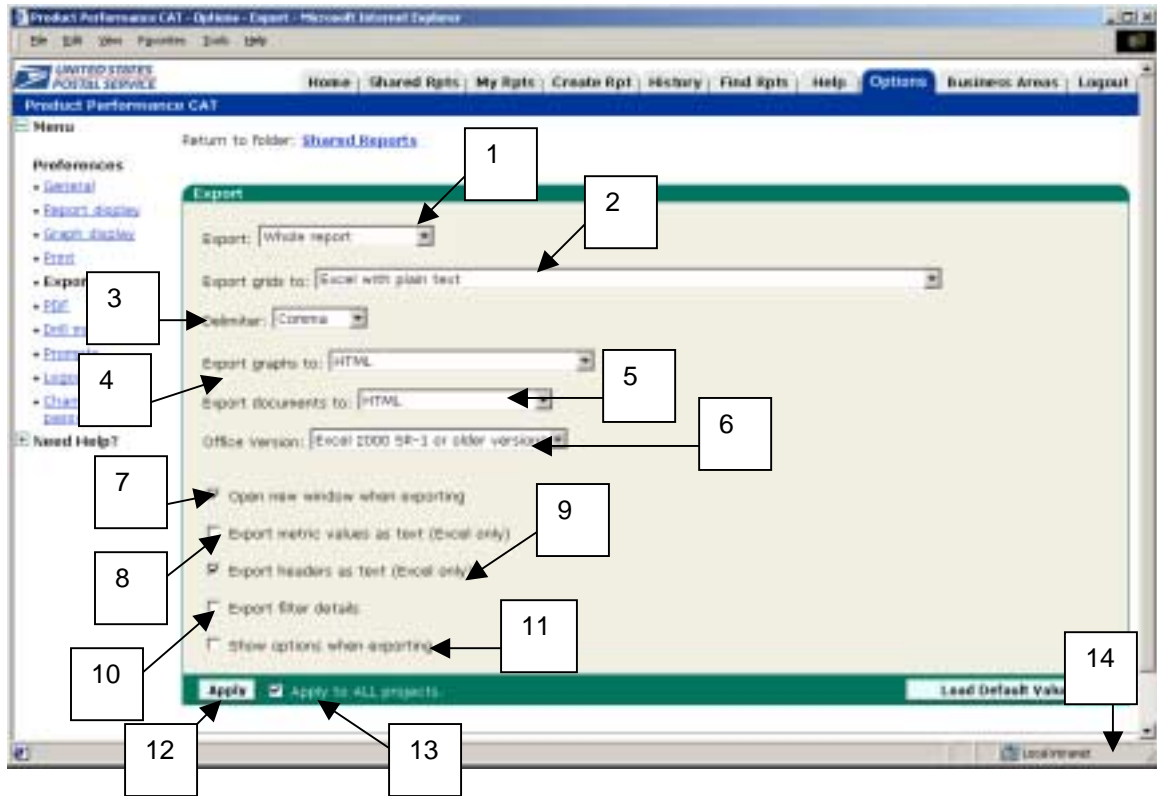


1. **Orientation** – This menu lets you select between **Portrait** (tall) and **Landscape** (wide) paper orientation for your printed reports. The default is Landscape.
2. **Paper size** – Select from seven sizes of printer paper. The default is **Letter**.
3. **Header and Footer:**
 - **Use report setting** – Allows you to use headers and footers saved as a part of the report settings.
 - **Use custom settings (edit)** – Clicking the edit link allows you to key in a specific header and footer.
4. **Scaling: (DHTML must be turned on)**
 - **Percentage of original font size** – Allows you to adjust the size of the font.
 - **Fit to page** – Allows you to adjust the amount of the report content that prints on a page.
 - **All rows** – Allows you to fit all rows on a page.
 - **All columns** – Allows you to fit all columns on a page.

5. **Enter the number of inches for: (DHTML must be turned on)** – Allows you to set the top, bottom, left and right margins. In order for reports to print properly, these margin settings and the margin settings in the browser's Page Setup option must match.
6. **Show popup print dialog** – Automatically displays the browser's Print dialogue box when you show a printable version of a report. The default is checked.
7. **Print cover page with selection summary** – Allows you to print the filter details of the report on a separate page before the contents of the report. The default is checked.
8. **Open new window when printing** – Opens a new Internet Explorer browser window when you choose print a report. If unchecked, the printing routine opens in the existing browser window. The default is checked.
9. **Print the grid and the graph on the same page** – Produces a report with data presented as a grid or a graph. When the box is not checked, the report prints in grid format only. The box is checked by default.
10. **Expand all Page By fields when printing** – Allows you to print all combinations of items in the Page By table when printing a report that has one or more items in the Page By table. Clear this box to print only the items currently displayed.
11. **Show options when printing** – Opens a window each time you print a report allowing you to select printing options for the current.
12. **Apply** – Saves your changes in the system.
13. **Apply to ALL projects** – Saves all changes as defaults across multiple databases. The box is checked by default.
14. **Load Default Values** – Resets the system default values for this screen.

3.3.2.5 Export Preferences

Clicking the Export Preference link in the left menu will show the following screen:



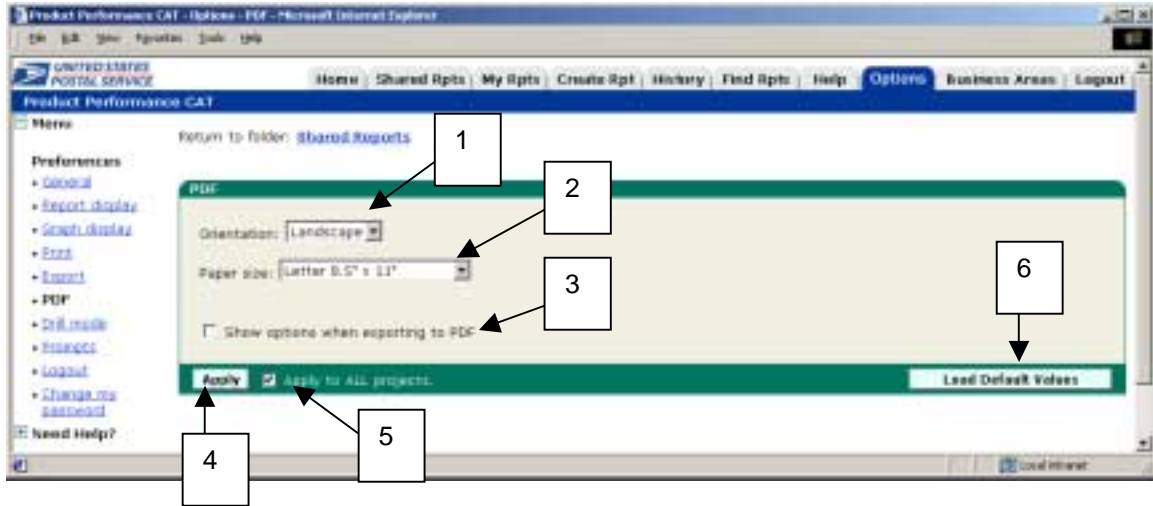
1. **Export** – Export an entire report or the page displayed only. The default is **Whole report**.
2. **Export grids to** – Choose the format of the output file into which you want the application to export your report:
 - **Excel with plain text** – Your report is exported into Microsoft Excel as plain text using the defaults in your setup for Excel. No formatting is retained.
 - **CSV file format**—Your report is exported in Comma Separated Values (CSV) format, which is useful for some applications in which all data is delimited by commas. This format is recognized by Microsoft Excel.
 - **Excel with formatting (Report exported to Excel 97 or lower not include formatting)** – Your report is exported into Microsoft Excel (must be Excel 97 or more recent version) with formatting (including fonts and colors) shown on the browser screen.
 - **HTML** – Your report is exported to an HTML page. The overall structure and format displayed on the Product Performance web page is maintained.
 - **Plain text** – Your report is exported to a plain text page. The overall structure and format of your report is not maintained. The text will have each field separated by commas.
3. **Delimiter** – Choose the symbol that will be used to separate exported file data. The choices are Comma, Tab, Semicolon, or Space. Comma is the default.

4. **Export graphs to** – Choose either the Excel 2000 SR-1 or newer versions, or the HTML format to determine how the graphs will be exported. HTML is the default.

NOTE: If you chose Excel 2000 in Step 4, you must choose “With formatting” or “Without formatting” to determine how the grid will be exported. “With formatting” is the default. Currently none of the Product Performance Reports use graphs.
5. **Export documents to** – Choose either HTML or Excel without formatting to determine your document export format. HTML is the default.
6. **Office Version** – Choose either Excel 2000 SR-1 or older versions or Excel XP or newer versions.
7. **Open a new window when exporting** – Requires the application to open a new Internet Explorer window for the exported file. The default is checked.
8. **Export metric values as text (Excel only)** – Check this box if you want the exported file to display metric values as text. The default is unchecked.
9. **Export headers as text (Excel only)** – Check this box if you want the exported file to contain headers as editable text. The default is checked.
10. **Export filter details** – Exports the file with the filter details used to generate the report. The default is unchecked.
11. **Show options when exporting** – Opens a window each time you export a report allowing you to select exporting options for the current report. The default is unchecked.
12. **Apply button** – Click the Apply button to save your changes.
13. **Apply to ALL projects** – Saves all changes as defaults across multiple databases.
14. **Load Default Values Button** – Resets the system default values for this screen.

3.3.2.6 PDF Preferences

Clicking the PDF Preference link in the left menu will show the following screen:



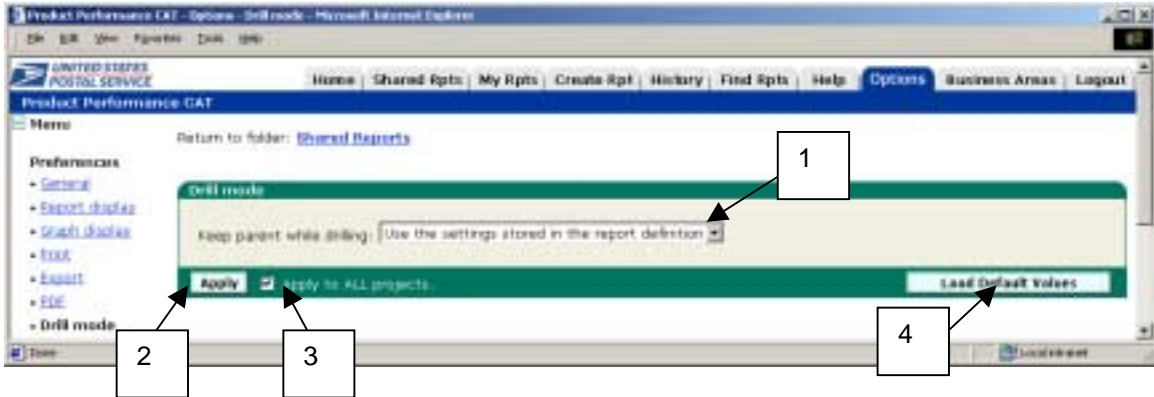
1. **Orientation** – This menu lets you select between **Portrait** (tall) and **Landscape** (wide) paper orientation for your printed reports.

NOTE: Ensure that your Internet Explorer paper orientation (in File/Page Setup) matches the orientation that you want. If the browser paper orientation is different from the one in the application, the printer will use the browser orientation.

2. **Paper size** – Select from seven different sizes of printer paper. The default is **Letter** (8.5" x 11").
3. **Show options when exporting to PDF** – Opens this Preferences window each time you export a report. The default is unchecked.
4. **Apply Button** – Click the **Apply** button to save your changes.
5. **Apply to ALL projects** – Saves all changes as defaults across multiple databases.
6. **Load Default Values Button** – Resets the system default values for this screen.

3.3.2.7 Drill Mode Preferences

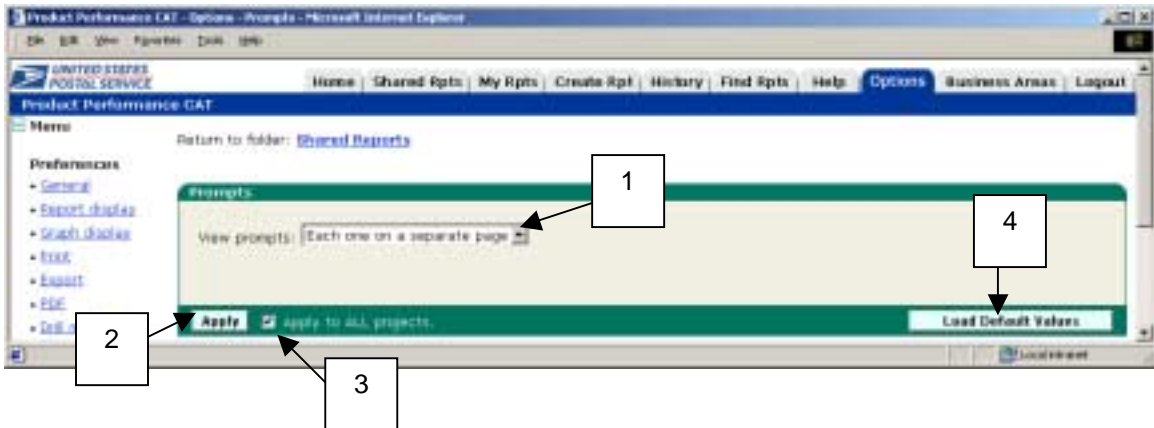
Clicking the Drill Mode Preference link in the left menu will show the following screen:



1. **Keep parent while drilling** – Use a drop-down menu to select whether or not to keep the parent level in the report when drilling or to rely on the system default. Select one of three choices:
 - Yes – To always keep the parent when drilling.
 - No – To never keep the parent when drilling.
 - Use the settings stored in the report definition – To use the default set by the System Administrator. This is the default setting.
2. **Apply** – Click the Apply button to save you changes.
3. **Apply to ALL projects** – Saves all changes across multiple databases.
4. **Load Default Values** – This button resets the system default values for this screen.

3.3.2.8 Prompts Preferences

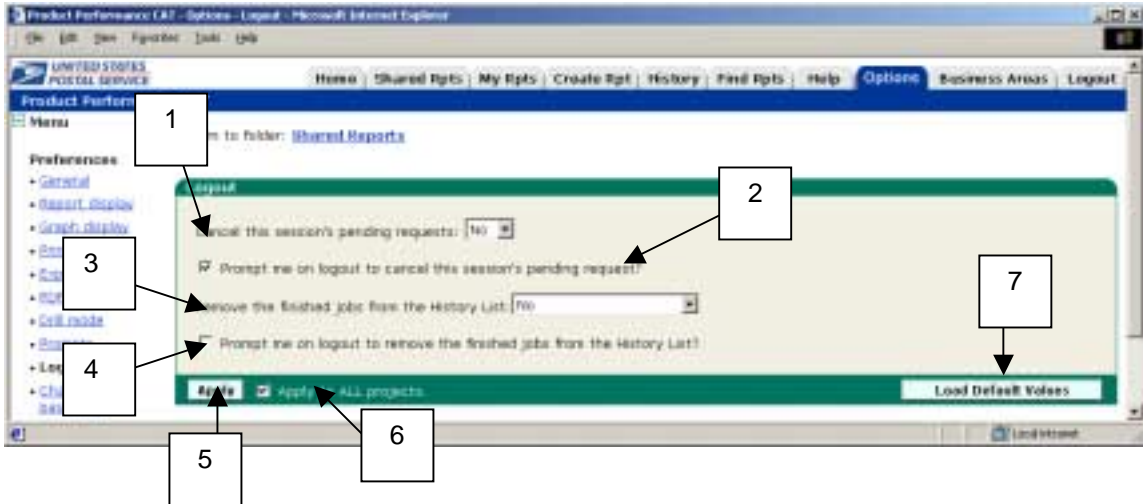
Clicking the Prompt Preference link in the left menu will show the following screen:



1. **View prompts** – Choose to view the Auto-prompts all on one page or each on a separate page.
2. **Apply** – Click **Apply** to save your changes.
3. **Apply to ALL projects** – Saves all changes as defaults across multiple databases.
4. **Load Default Values** – This button resets the system default values for this screen.

3.3.2.9 Logout Preferences

Clicking the Logout Preferences link in the left menu will show the following screen:



1. **Cancel this session's pending requests** – Allows you to make a choice on whether to automatically cancel pending reports at logout. The drop-down menu choices are **Yes** and **No**.
2. **Prompt me on logout to cancel this session's pending request?** – A window opens upon log out prompting you to select **Yes** or **No** to cancel any reports currently generating.
3. **Remove the finished jobs from the History List** – Allows you to choose whether to remove reports from the History folder at logout. The choices in the drop-down menu are **Yes**, **No**, and **Only the read messages**.
4. **Prompt me on logout to remove the finished jobs from the History List?** – A window opens upon log out prompting you to select **Yes** or **No** to remove finished jobs from the History List.
5. **Apply** – Click **Apply** to save your changes.
6. **Apply to ALL projects** – Save all changes as defaults across multiple databases.
7. **Load Default Values** – This button resets the system default values for this screen.

4.0 Product Performance Data Hierarchies

4.1 Product Performance Data Structure

In order to create Product Performance Reports, the information must be carefully structured. In Product Performance, part of that structuring involves building hierarchies of data. A hierarchy is a group of entities arranged in a graded series.

Terms that are important to understand with hierarchies are provided below:

Attribute - An attribute is a level of data within a hierarchy. Essentially, an attribute is the level or subject by which you want to analyze facts. An attribute usually can not be aggregated because it does not lend itself to being summed or averaged. Also, an attribute is the means by which you define the data that you want to display on a report. For example, in the location hierarchy, **Area** is an attribute. Capitol Metro Area is an attribute.

Element - An element is an actual piece of data within an attribute that is displayed on a report. For example, the Capital, Northern Virginia, Baltimore, and Richmond districts are elements within the Capitol Metro Area.

The three main Product Performance hierarchies are:

- Product/Service
- Location
- Time

4.1.1 Product/Service Hierarchy

Like the location information in the Product Performance, the product information is also arranged into a hierarchy. The order of the product/service hierarchy is:

- Product/Service
- Product Type
- Product Category
- Service Standards

Product/Service includes Packages Services, Priority Mail, First Class and Standard Mail.

Product/Service contains product types (i.e. Package Services – Commercial).

Product Types contain product categories (i.e. Package Services – Commercial – Other).

Product Categories contain services standards (i.e. Package Services – Commercial – Other – 1 Day, Package Services – Commercial – Other – 2 Day).

4.1.2 Location Hierarchy

Product Performance groups location information into a hierarchy. This information is at several levels ranging from national information down to information from individual ZIP-5 area codes.

- National
- Area
- District

- ZIP-3
- ZIP-5

The National level is the accumulation of the Areas beneath it. Data from all the Areas is gathered to make the National data.

The Area level is made up of all the data from the Districts within the Area.

The District is made up of ZIP-3 Areas.

The ZIP-3 Area is made up of ZIP-5 Areas.

4.1.3 Time Hierarchy

Like the location and product/service information in the Product Performance, the time information is also arranged into a hierarchy. The order of the time hierarchy is:

- Government Fiscal Year
- Government Fiscal Quarter
- Week
- Day of Week

The Government Fiscal Year is made up of 4 quarterly accounting period quarters.

Each Fiscal Quarter is made of 3 accounting monthly periods (except for the final quarter, which contains 4 accounting periods).

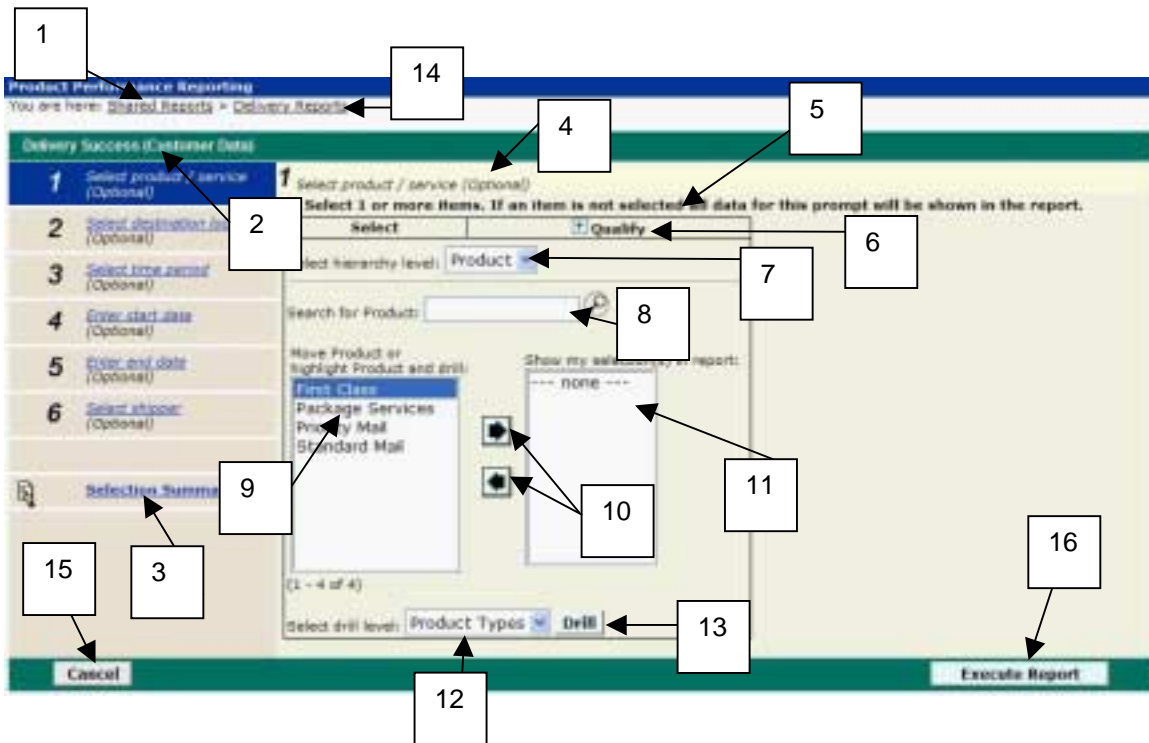
A week is made up of 7 days.

The Day of the Week is made up of a specific day (i.e. Monday, Tuesday, etc).

5.0 Generating Product Performance Reports

5.1 Understanding Auto-prompts

Auto-prompts are used to select the specific elements that you want to see in a report. The three main prompts you will see in the Product Performance Reports are **Product/Service, Location** and **Time**. An example of the Product/Service Auto-prompt and a description of its labeled parts are displayed below:



5.1.1 Parts of an Auto-prompt

1. **Title Bar** – Displays the title of the report that you are generating.
2. **Auto-prompt links** – These hyperlinks take you to each Auto-prompt screen to select criteria for the report. Each link is numbered, allowing you to easily see how many prompts are available on the report.
3. **Selection Summary** – Displays all selections made in each of the Auto-prompts.
4. **Auto-prompt number and name** – Displays the name and number of the Auto-prompt.
5. **Instructions** – Displays instructions for completing the step.
6. **Quality button** – Displays another screen which allows you to set specific requirements that must be met by the selected elements (for example, you can specify that a selected element be “Greater Than,” “Less Than,” “Between,” etc.).

7. **Hierarchy level** – Displays the current level within the hierarchy. Allows you to move to other levels in the hierarchy by selecting the preferred level from the drop-down menu.
8. **Search box** – Allows you to search for attributes within the elements box.
9. **Elements box** – Contains all the attributes that pertain to the hierarchy level.
10. **Right-facing and Left-facing Arrows** – Moves the selected attributes into or out of the My selections box.
11. **My Selections** – Displays the Auto-prompt criteria that you have selected to build your report.
12. **Drill to** – Allows you to select a drill level from the drop-down menu.
13. **Drill button** – Allows you to drill to your selected level.
14. **Navigation path** – Displays the folder links on which you clicked in order to reach the current screen.
15. **Cancel** – Cancel your Auto-prompt selections and return to the report folder.
16. **Execute Report** – Generate the report from the selected Auto-prompts.

5.1.2 Product / Service Prompt

Use the **Product/Service** prompt to select the product(s) or service(s) that you wish to include in your report. While all time prompts are similar, hierarchies available within each report may vary. You can choose from the list of products in order to see data.

The following example is from the Delivery Success (Customer Data) report:

The screenshot displays the 'Delivery Success (Customer Data)' report interface. On the left, a vertical navigation pane lists seven optional prompts: 1. Select product / service (Optional), 2. Select destination location (Optional), 3. Select time period (Optional), 4. Enter start date (Optional), 5. Enter end date (Optional), 6. Select shipper (Optional), and 7. Select customer (Optional). Below these is a 'Selection Summary' icon and link.

The main content area is titled '1 Select product / service (Optional)' and includes the instruction: 'Select 1 or more items. If an item is not selected all data for report.' The interface is divided into two sections: 'Select' and '+ Qualify'. In the 'Select' section, there is a 'Select hierarchy level:' dropdown menu currently set to 'Product', with a callout box labeled '1' pointing to it. Below this is a 'Search for Product:' text box with a magnifying glass icon. A list of product categories is shown: 'First Class', 'Package Services', 'Priority Mail', and 'Standard Mail'. To the right of this list are two arrow buttons (right and left). Further right, under 'Show my selection(s) in report:', there is a dropdown menu currently set to '--- none ---'. At the bottom of the 'Select' section, there is a 'Select drill level:' dropdown menu set to 'Product Types' and a 'Drill' button, with a callout box labeled '2' pointing to it. A status indicator '(1 - 4 of 4)' is visible below the product list.

NOTE: (1) The levels within the location hierarchy level drop-down menu are displayed. To move to other levels within the hierarchy, you can select the desired hierarchy level from the Hierarchy Level drop-down menu or (2) use the Drill feature to drill down.

5.1.3 Location Prompt

Use the **Location** prompt to select data for particular location(s) that you wish to include in your report. While all location prompts are similar, hierarchies available within each report may vary.

The following example is from the Delivery Success (Customer Data) report. This Auto-prompt allows you to select a destination location:

Delivery Success (Customer Data)

1 [Select product / service](#) (Optional)

2 [Select destination location](#) (Optional)

3 [Select time period](#) (Optional)

4 [Enter start date](#) (Optional)

5 [Enter end date](#) (Optional)

6 [Select shipper](#) (Optional)

7 [Select customer](#) (Optional)

[Selection Summary](#)

2 [Select destination location](#) (Optional)
Select 1 or more items. If an item is not selected all data for this report.

Select hierarchy level: Destination Area

Search for Destination Area:

Move Destination Area or highlight Destination Area and drill:

- CAPITAL METRO
- EASTERN
- GREAT LAKES
- NEW YORK METRO
- NORTHEAST
- PACIFIC
- SOUTHEAST
- SOUTHWEST
- WESTERN

Show my selection(s) in report: --- none ---

(1 - 9 of 9)

Select drill level: Destination District **Drill**

NOTE: (1) The levels within the location hierarchy level drop-down menu are displayed. To move to other levels within the hierarchy, you can select the desired hierarchy level from the Hierarchy Level drop-down menu or (2) use the Drill feature to drill down.

5.1.4 Time Prompt

Use the **Time** prompt to select data for particular time period(s) that you wish to include in your report. While all time prompts are similar, hierarchies available within each report may vary.

The following example is from the Delivery Success (Customer Data) report. This prompt allows you to select a time period or enter a start and end date. It is highly recommended that you enter either a time period OR a start and end date. Entering a time period AND a start and end date could potentially return no data.

Delivery Success (Customer Data)

1 [Select product / service](#)
(Optional)

2 [Select destination location](#)
(Optional)

3 [Select time period](#)
(Optional)

4 [Enter start date](#)
(Optional)

5 [Enter end date](#)
(Optional)

6 [Select shipper](#)
(Optional)

7 [Select customer](#)
(Optional)

[Selection Summary](#)

3 [Select time period \(Optional\)](#)
Select 1 or more items. If an item is not selected all data for report. Use either the time period prompt or the start and end date.

Select hierarchy level: GFY 1

Search for GFY:

Move GFY or highlight GFY and drill:

- Oct 2003- Sep 2004
- Oct 2002- Sep 2003
- Oct 2001- Sep 2002

Show my selection(s) in report:
--- none ---

(1 - 3 of 3)

Select drill level: GFQ **Drill** 2

NOTE: (1) The levels within the time hierarchy drop-down are displayed. To move to other levels within the hierarchy, you can select the desired hierarchy level for the Hierarchy Level drop-down menu or (2) use the Drill feature to drill down.

5.1.5 Qualify Prompt

The Qualify Prompt allows you to set specific requirements that must be met by the selected attributes.

The following example is from the Delivery Success (Customer Data) report.

Delivery Success (Customer Data)

1 [Select product / service](#)
(Optional)

2 [Select destination location](#)
(Optional)

3 [Select time period](#)
(Optional)

4 [Enter start date](#)
(Optional)

5 [Enter end date](#)
(Optional)

6 [Select shipper](#)
(Optional)

7 [Select customer](#)
(Optional)

[Selection Summary](#)

3 [Select time period \(Optional\)](#)
Select 1 or more items. If an item is not selected all data for report. Use either the time period prompt or the start and end

Select + Qualify

Select hierarchy level: GFY

Search for GFY:

Move GFY or highlight GFY and drill:

- Oct 2003- Sep 2004
- Oct 2002- Sep 2003
- Oct 2001- Sep 2002

Show my selection(s) in report:
--- none ---

(1 - 3 of 3)

Select drill level: GFQ Drill

Note: (1) Use the drop-down menu to select the hierarchy level that you wish to qualify, (2) Click on the Qualify sign.

The following screen will appear:

1. **Hierarchy Level** – Select the hierarchy level that you want to measure.
2. **Is** – Select the type of comparison that you want to use with the number that you entered into the **Value** box. These are the descriptions of the options in the **Is** drop-down menu:
 - **Between** – Enter two numbers separated by a semicolon in the **Value** box to find all data between those two numbers.
 - **Not between** – Enter two numbers separated by a semicolon in the **Value** box to find data outside of those values.
 - **Exactly** – Similar to equal to, will match the string of characters entered into the **Value** box exactly.
 - **Not exactly** - Similar to equal to, will find anything that does not match what is entered into the **Value** box exactly.
 - **Greater than** – Finds any number greater than the number in the **Value** box.
 - **Greater than or equal to** – Finds any number that is greater than or equal to the number in the **Value** box.
 - **Less than** – Finds any number less than the number in the **Value** box.
 - **Less than or equal to** – Finds any number less than or equal to the number in the **Value** box.
 - **Like** – Finds any data that is similar to the values in the **Value** box.
 - **Not Like** – Finds anything that is not similar to the values in the **Value** box.
 - **In** – Finds any data matching items in a series of numbers in the **Value** box.
 - **Not in** – Will find anything that is does not match the items in the series of numbers in the **Value** box.
3. **Value** – The value that you want to use in the comparison.

5.1.6 Shipper Prompt

Use the **Shipper** prompt to select shipper(s) to include in your report. Customers will be restricted to viewing data solely for their shipper(s).

The following example is from the Delivery Success (Customer Data) report. This prompt allows you to select shippers to view report results using the arrow buttons.

Delivery Success (Customer Data)

1 [Select product / service](#) (Optional)

2 [Select destination location](#) (Optional)

3 [Select time period](#) (Optional)

4 [Enter start date](#) (Optional)

5 [Enter end date](#) (Optional)

6 [Select shipper](#) (Optional)

7 [Select customer](#) (Optional)

[Selection Summary](#)

6 [Select shipper](#) (Optional)
Select 1 or more items. If an item is not selected all data for this prompt will be shown in the report.

Select hierarchy level: Shipper

Select Quality

Select hierarchy level: Shipper

Search for Shipper:

Move Shipper or highlight Shipper and drill:

- SHIPPER ONE
- SHIPPER TWO
- SHIPPER THREE
- SHIPPER FOUR
- SHIPPER FIVE
- SHIPPER SIX
- SHIPPER SEVEN
- SHIPPER EIGHT
- SHIPPER NINE

Show my selection(s) in report:
 --- none ---

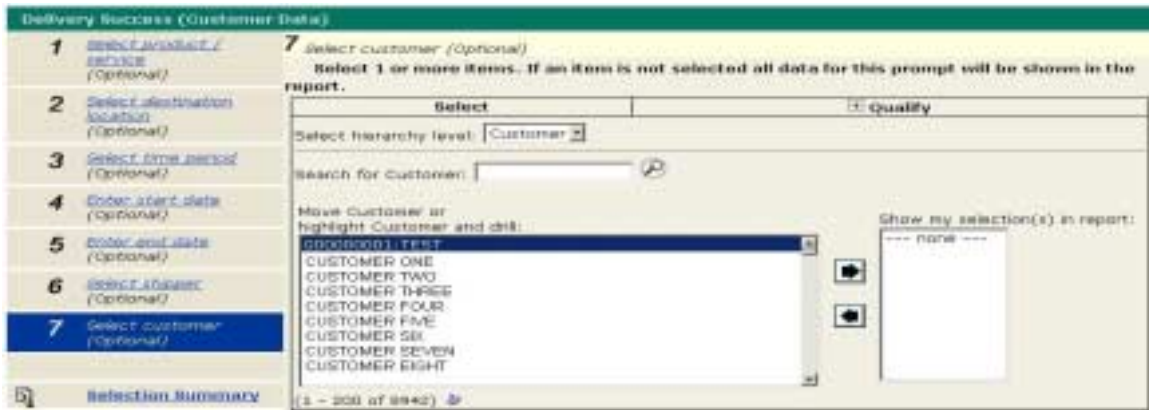
(1 - 300 of 8869)

Select drill level: Shipper Location **Drill**

5.1.7 Customer Prompt


Use the **Customer** prompt to select customer information. Customers will be restricted to viewing solely their customer data.

The following example is from the Delivery Success (Customer Data) report.



5.1.8 Selection Summary

The Selection Summary link serves as the final check to view selection criteria prior to executing a report. You can modify selection criteria by clicking on selection prompts at any time.

Delivery Success (Customer Data)	
✓ 1 Select product / service (Optional)	 Selection Summary Prompt 1: Select product / service Your selection: Product In (First Class)
✓ 2 Select destination location (Optional)	Prompt 2: Select destination location Your selection: Destination Area In (EASTERN)
✓ 3 Select time period (Optional)	Prompt 3: Select time period Your selection: GFY In (Oct 2003- Sep 2004)
4 Enter start date (Optional)	Prompt 4: Enter start date Prompt not answered
5 Enter end date (Optional)	Prompt 5: Enter end date Prompt not answered
6 Select shipper (Optional)	Prompt 6: Select shipper Prompt not answered
7 Select customer (Optional)	Prompt 7: Select customer Prompt not answered
 Selection Summary	

5.1.9 Selecting Report Criteria

Within each Auto-prompt, the data can be selected using the arrow buttons. Multiple selections can be made using the right and left arrow buttons below.

The screenshot displays the 'Delivery Success (Customer Data)' report configuration interface. On the left, a sidebar lists seven optional steps: 1. Select product / service, 2. Select destination location, 3. Select time period, 4. Enter start date, 5. Enter end date, 6. Select shipping, and 7. Select customer. The main panel is titled '1 Select product / service (Optional)' and includes a 'Qualify' button. Below this, there is a 'Select' tab with a 'Select hierarchy level' dropdown set to 'Product' and a 'Search for Product' field. A list of products is shown: 'Priority Mail' and 'Standard Mail'. A 'Move Product or highlight Product and drill:' section contains two arrow buttons (right and left). The 'Show my selection(s) in report:' window displays 'Product:' with 'First Class' and 'Package Services' selected. A 'Selection Summary' icon is at the bottom left. At the bottom, there is a 'Select drill level' dropdown set to 'Product Types' and a 'Drill' button.

To make report selection(s):

1. Highlight the selection(s).
2. Move selection(s) to "Show my selection(s) in report" (right hand window) using the **right arrow** button. Report results will display only for First Class and Package Services.

A report selection can also be removed by highlighting the selection in the right hand window and moving the selection back to the left hand window using the **left arrow** button.

5.1.10 Selecting Report Criteria in Hierarchies

Within each Auto-prompt, the data available for you to select is arranged in hierarchies. Each level down the hierarchy contains increasingly specific data. Multiple selections can be made for data among hierarchies.

NOTE: In this example, selections have been made to view data at a national level and for the Great Lakes Area. MicroStrategy allows a user to view report results that include “at least 1 selection” or view report results for “selection exactly”. Selecting to view “at least 1 selection” will return results for Great Lakes. Selecting “selections exactly” will return results for all areas including Great Lakes.

5.1.11 Selecting Criteria Using the Drill Feature

Each level down the hierarchy contains increasingly specific data. To reach the hierarchy level that contains the data you wish to select, you will use the **Drill** feature.

Delivery Success (Customer Data)

- 1 [Select product / service \(Optional\)](#)
- 2 [Select destination location \(Optional\)](#)
- 3 [Select time period \(Optional\)](#)
- 4 [Enter start date \(Optional\)](#)
- 5 [Enter end date \(Optional\)](#)
- 6 **Select shipper (Optional)**
- 7 [Select customer \(Optional\)](#)

6 Select shipper (Optional)
Select 1 or more items. If an item is not selected all data for this prompt will be shown in the report.

Select hierarchy level: Shipper

Search for Shipper:

Move Shipper or highlight Shipper and drill:

- SHIPPER ONE
- SHIPPER TWO
- SHIPPER THREE
- SHIPPER FOUR
- SHIPPER FIVE
- SHIPPER SIX
- SHIPPER SEVEN
- SHIPPER EIGHT
- SHIPPER NINE

Show my selection(s) in report:
--- none ---

(1 - 300 of 8989)

Select drill level: Shipper Location **Drill**

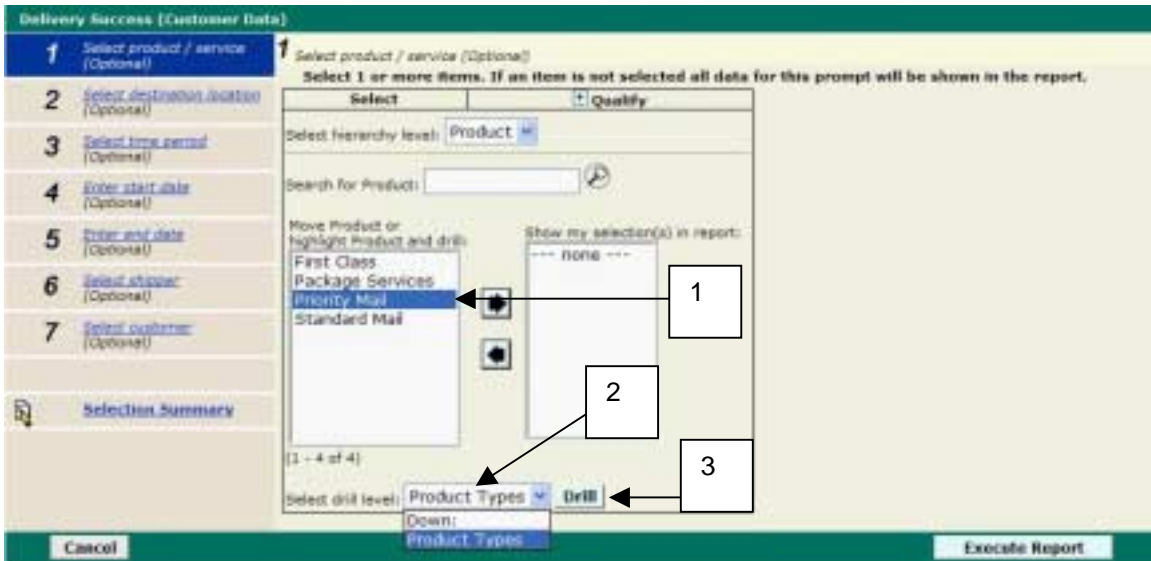
5.1.12 Drilling in Auto-prompts

This feature allows you to move up or down within a hierarchy in order to select the data for your report. Drilling in Auto-prompts allows you to select specific hierarchy levels *before* generating your report. You can also drill in your reports *after* you have generated your report. Drilling in reports is discussed in the Drilling section of this User Guide.

For reference, here is the Product/Service Hierarchy:

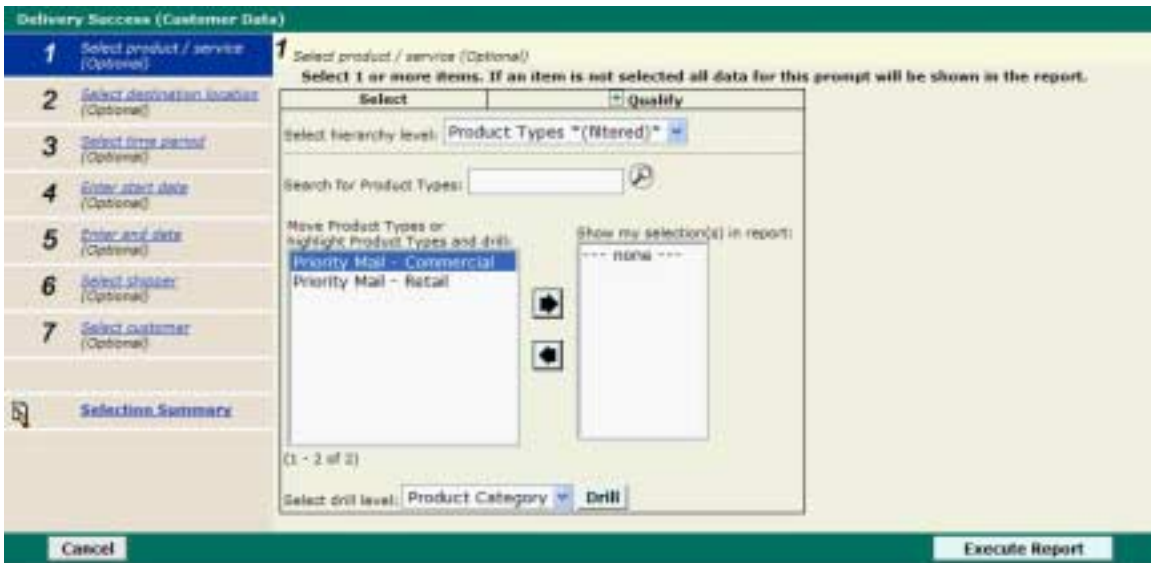
- Product
 - Product Type
 - Product Category
 - Service Standards

The following example is from the Delivery Success (Customer Data) report. To drill from the **Product** level to the **Service Standard** level to select data for Commercial Priority Mail, follow the steps below:

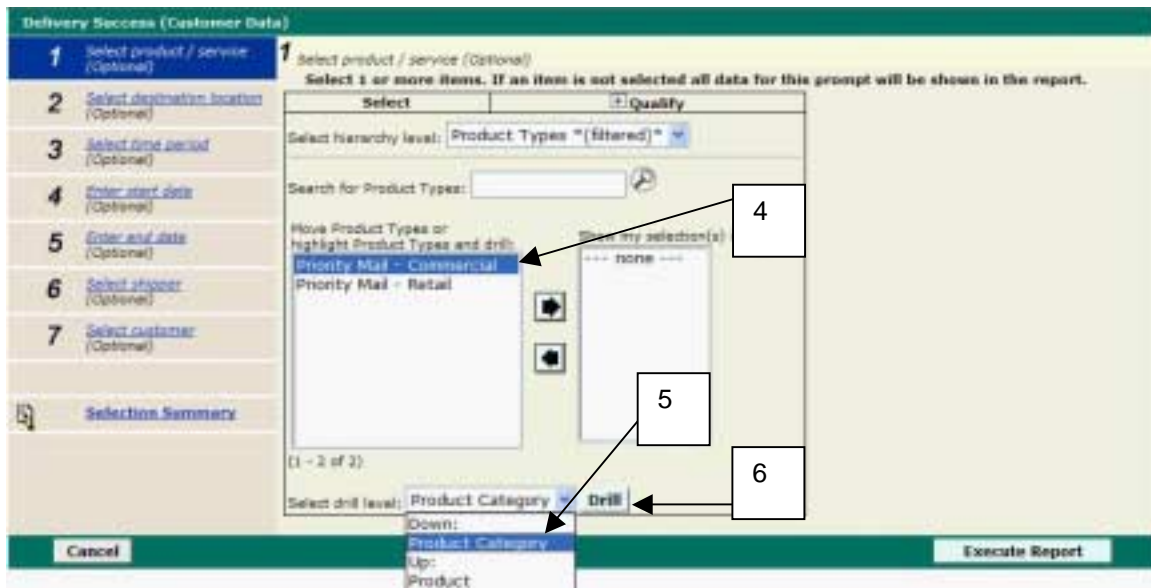


1. Highlight **Priority Mail** from the **Product** elements box. Do not move Priority Mail to the My Selections box.
2. Select **Product Types** from the **Select Drill Level** drop-down menu.
3. Click on the **Drill** button.

All of the Product Types (Priority Mail—Commercial and Priority Mail—Retail) for Priority Mail are displayed:

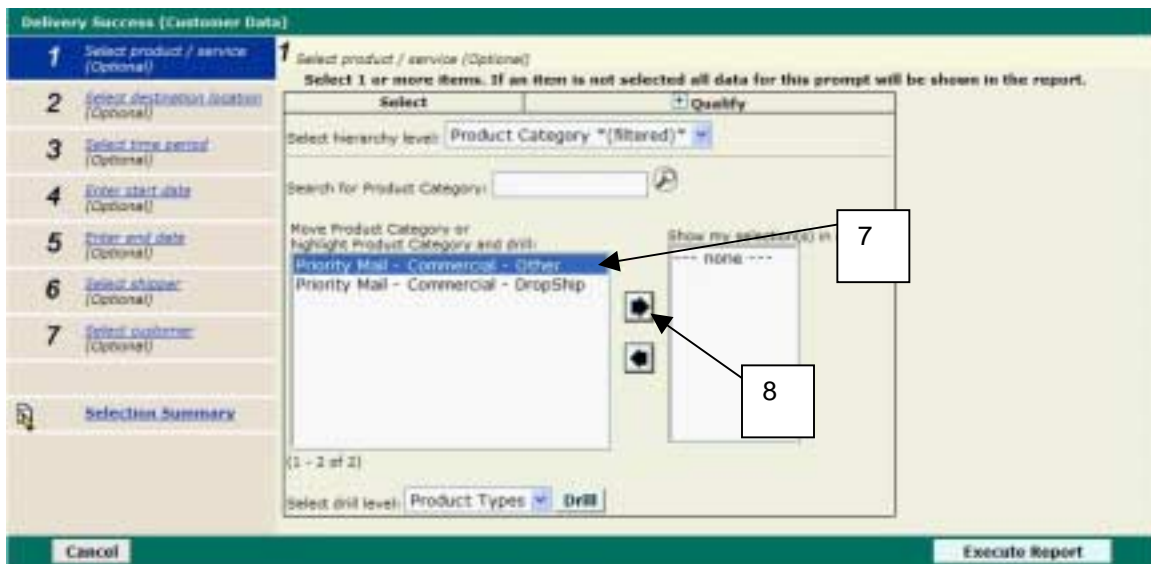


You can drill down to Product Category as shown below:



4. Click on **Priority Mail--Commercial** from the **Product Types** elements box.
5. Select **Product Category** from the **Select Drill Level** drop-down menu.
6. Click on the **Drill** button.

All of the Product Categories for Priority Mail—Commercial are displayed:



7. Click on the desired Product Category (for example, **Priority Mail—Commercial—Other**) from the **Product Category** elements box.

- Click on the **right arrow** button to move this to your My Selections box. Report results will display only Priority Mail—Commercial—Other data.

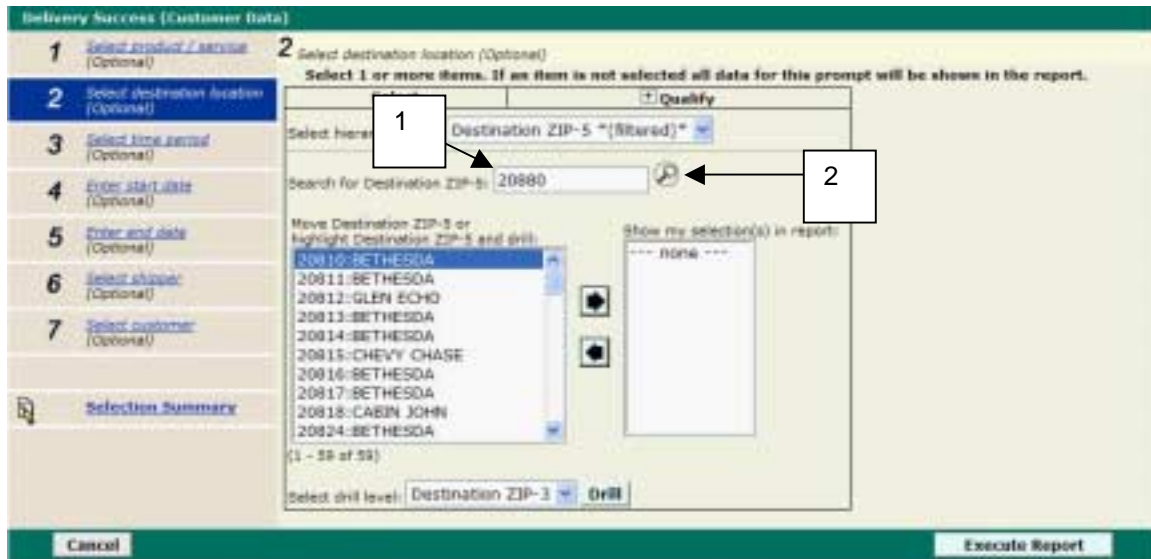
Delivery Success (Customer Data)

<p>✓ 1 Select product / service (Optional)</p> <p>2 Select destination location (Optional)</p> <p>3 Select time period (Optional)</p> <p>4 Enter start date (Optional)</p> <p>5 Enter end date (Optional)</p> <p>6 Select shipper (Optional)</p> <p>7 Select customer (Optional)</p> <p> Selection Summary</p>	<p>1 Select product / service (Optional)</p> <p>Select 1 or more items. If an item is not selected all data for this prompt will be reported.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Select</th> <th style="width: 50%;">Quality</th> </tr> </thead> <tbody> <tr> <td colspan="2">Select hierarchy level: Product Category [^](filtered) <input type="button" value="v"/></td> </tr> <tr> <td colspan="2">Search for Product Category: <input type="text"/> <input type="button" value="🔍"/></td> </tr> <tr> <td colspan="2">Move Product Category or highlight Product Category and drill:</td> </tr> <tr> <td style="vertical-align: top;"> <div style="border: 1px solid black; padding: 2px;">Priority Mail - Commercial - DropShip</div> </td> <td style="vertical-align: top;"> <div style="border: 1px solid black; padding: 2px;">Product Category:</div> <div style="border: 1px solid black; padding: 2px;">Priority Mail - Commercial - Other</div> </td> </tr> <tr> <td style="text-align: center;"> <input type="button" value="➡"/> <input type="button" value="⬅️"/> </td> <td></td> </tr> <tr> <td colspan="2" style="text-align: center;">(1 - 2 of 2)</td> </tr> <tr> <td colspan="2">Select drill level: Product Types <input type="button" value="v"/> <input type="button" value="Drill"/></td> </tr> </tbody> </table>	Select	Quality	Select hierarchy level: Product Category [^](filtered) <input type="button" value="v"/>		Search for Product Category: <input type="text"/> <input type="button" value="🔍"/>		Move Product Category or highlight Product Category and drill:		<div style="border: 1px solid black; padding: 2px;">Priority Mail - Commercial - DropShip</div>	<div style="border: 1px solid black; padding: 2px;">Product Category:</div> <div style="border: 1px solid black; padding: 2px;">Priority Mail - Commercial - Other</div>	<input type="button" value="➡"/> <input type="button" value="⬅️"/>		(1 - 2 of 2)		Select drill level: Product Types <input type="button" value="v"/> <input type="button" value="Drill"/>	
Select	Quality																
Select hierarchy level: Product Category [^](filtered) <input type="button" value="v"/>																	
Search for Product Category: <input type="text"/> <input type="button" value="🔍"/>																	
Move Product Category or highlight Product Category and drill:																	
<div style="border: 1px solid black; padding: 2px;">Priority Mail - Commercial - DropShip</div>	<div style="border: 1px solid black; padding: 2px;">Product Category:</div> <div style="border: 1px solid black; padding: 2px;">Priority Mail - Commercial - Other</div>																
<input type="button" value="➡"/> <input type="button" value="⬅️"/>																	
(1 - 2 of 2)																	
Select drill level: Product Types <input type="button" value="v"/> <input type="button" value="Drill"/>																	

5.1.13 Using the “Search for” Field

There may be times when there are several listed in the elements box. Rather than scroll through them all to locate the attribute that you want, use the Search field to find one or more elements in a long list quickly.

The following is an example of how to search for ZIP-5 “20880” in the element box:



1. Enter “20880” in the **Search for Destination ZIP-5** window.
2. Click the **Search** button (the magnifying glass icon).

The match to the search criteria is displayed in the Origin ZIP-5 element box:

The screenshot displays the 'Delivery Success (Customer Data)' report configuration screen. On the left, a vertical list of steps is shown, with step 2, 'Select destination location (Optional)', highlighted in blue. The main area shows a search interface for 'Destination ZIP-5'. The search criteria is '20880*'. The search results list contains one entry: '20880 WASHINGTON GROVE', which is highlighted in blue. A callout box labeled 'Search Results' points to this entry. The interface also includes a 'Select hierarchy level' dropdown set to 'Destination ZIP-5 *(Filtered)*', a 'Search for Destination ZIP-5' input field, a 'Select drill level' dropdown set to 'Destination ZIP-3', and buttons for 'Cancel' and 'Execute Report'.

NOTE: This is an exact match search, so if you are unsure of the exact ZIP, type fewer characters rather than more. You do not need to type in the asterisk, as it is inserted for you upon clicking the magnifying glass.

5.2 Report Format

The system uses the “grid” type of report display format. The grid format is similar to a spreadsheet, displaying data in rows and columns. An example of the grid report format is below:

Destination Area	Total Pieces Graced	Delivered 1st Attempt	% of Pieces Delivered/Picked On Same Day	% of Pieces Delivered/Picked On Day 1	% of Pieces Delivered/Picked On Day 2	% of Pieces Delivered/Picked On Day 3	% of Pieces Delivered/Picked On Day 4
GREAT LAKES	5,440,644	5,097,132	93.69%	40.33%	23.96%	14.75%	7.44%
Total	5,440,644	5,097,132	93.69%	40.33%	23.96%	14.75%	7.44%

5.2.1 Parts of a Grid Report

1. **Title bar** – Displays the report title.
2. **Navigation Path** – Displays the navigation path taken to get to the current screen. In this example a user clicked on Shared Reports and the Delivery folder.
3. **Report buttons** – Buttons to print, export to Excel, PDF, re-prompt, refresh, and save your reports.
4. **Report Menus (Report, View Data, Format)** – Allow you to perform various manipulations of data and format in your report.
5. **Report Feature Information button (light bulb icon)** – Provides a brief description on how to use a feature.

5.2.2 Report Menu

The Report Menu consists of the following:



The following options are available on the Report menu:

- **Go to Create Reports** – Open the Create Report folder.
- **Save As** – Save the report to the My Reports folder.
- **Print** – Print the report.
- **Export** – Export the report to Excel.
- **PDF** – Display the report in PDF format.
- **Report Details** – Retrieve the filter details and report information.

5.2.3 View Menu

The View Menu consists of the following:



The following options are available on the View menu:

- **Selection Summary** – Display the selections from the Auto-prompts that were used to generate the report.
- **Toolbars** – Display or hide the page number and row/column count toolbars.
- **Show Pivot Buttons** – Display or hide the pivot buttons (sort, pivot left, pivot right, move to columns, move to rows, page by).

5.2.4 Data Menu

The Data Menu consists of the following:



The following options are available on the Data menu

- **Sort** – Sort the column of data in ascending or descending order.
- **Drill** – Simple drill within a report.
- **Select Data To Display** – Select specific rows and columns of data to be displayed on the report.
- **Refresh** – Update the data within the report.
- **Re-prompt** – Make changes in prior Auto-prompt selections.
- **Totals** – Display totals, subtotals, etc. on a report.

5.2.5 Format Menu

The Format Menu consists of the following:

Shipper	Shipper One	National	Product Category	Metrics	Cost of all Delivered Mail Pieces	Volume Within Service Standard	Volume within Service Standard	Del. on.
Shipper One	123456789	NATIONAL	Package Services - Commercial - ParcelSelect DDMC		4	3	75.00%	1
Shipper Two	987654321	NATIONAL	Package Services - Commercial - ParcelSelect DDMC		14,042	14,140	95.27%	32
			Package Services - Commercial - ParcelSelect DDMC		185	159	85.95%	11
			Package Services - Commercial - ParcelSelect DDMC		30,632	29,734	97.07%	33
Total					45,663	44,026	96.44%	25

The following options are available on the Format menu:

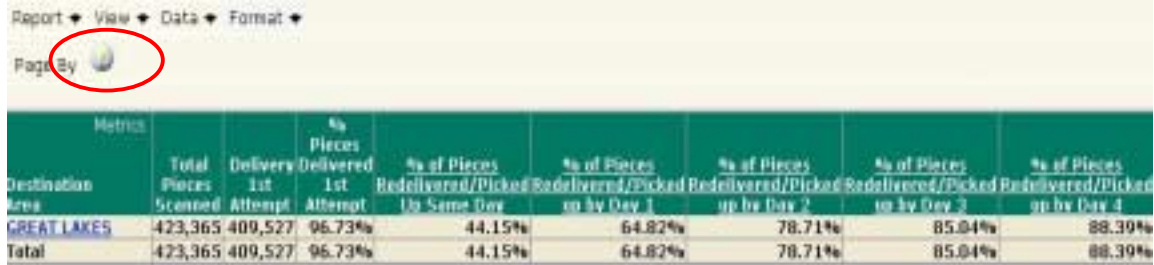
- **Lock Report Headers** – Lock headers at the top and/or side of a grid report so that you can scroll through the data while retaining the headers.
- **Merge Column Headers** – Merge column headers that are repeated.
- **Merge Row Headers** – Merge row headers that are repeated.
- **Outline** – Display your report in an expandable and collapsible format.

5.2.6 Report Feature Information Buttons

The Page By and Drill features contain information buttons that give a brief description of how to use each feature. For more detailed information on how to use the Page By and Drill features, access the Help folder or refer to the Page By and/or Drill sections of this User Guide.

Page By Information Feature

A light bulb icon appears next to the **Page By** title indicating that information can be obtained on how to use this feature:



Click the **Page By Feature Information Button** (light bulb icon) to display a brief description on how to use the Page By feature.

The Page By Information screen appears in a separate window with a brief explanation of the Page By feature:



Click the **Close** button to close this window.

Drill Information Feature

A light bulb icon appears next to the **Drill** title indicating that information can be obtained on how to use this feature.

In order to see the icon for the Drill feature, the Simple Drill panel must be displayed:



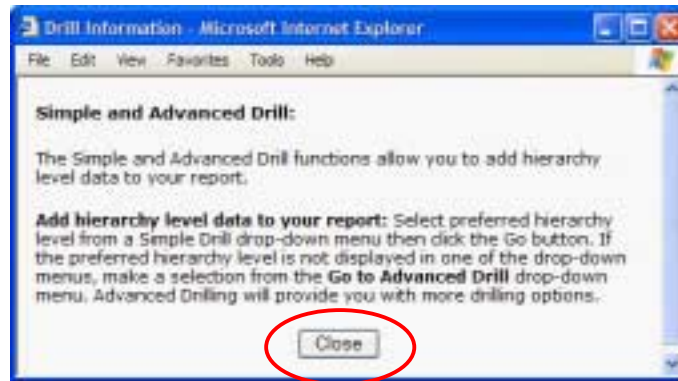
To display the Simple Drill panel, select *Drill* from the *Data* menu.

The Simple Drill panel is displayed:



Click the **Drill Feature Information Button** (light bulb icon) to display a brief description of how to use the Drill feature.

The Drill Information screen appears in a separate window with a brief explanation of the Drill feature:



Click the **Close** button to close this window.

5.2.7 Report Buttons

To the right of the report title are a series of buttons that allow you to shortcut to the report tools.



Each button is displayed below with an explanation of its function:



Print – Launch the Print Options Dialog window to create a printable version of the report.



Export Data – Launch the Export Dialog window that allows you to export data to Excel.



PDF –Export a report to be viewed in PDF (Portable Document Format).



Re-Prompt – Return to Auto-prompt screen with all prior selections in the My Selections box.



Refresh Data – Rerun the report with updated data.



Save – Launch a report save dialog to save the report in the My Reports folder.

6.0 Customizing Product Performance Reports

6.1 Customizing Report Format

After generating your reports, you can use the following MicroStrategy reporting features to customize the layout of your Product Performance Reports.

6.1.1 Lock Report Headers

This feature locks column rows and headers so that they will stay in view as you scroll across and down a report.

Lock Row Headers

To lock your row headers, select **Lock Report Headers > Lock Row Headers** from the **Format** menu. Your report will refresh with locked row headers.



A check mark appears if the feature is turned on.



To toggle this feature on and off, select **Lock Row Headers** again.

Lock Column Headers

To lock your column headers, select **Lock Report Headers > Lock Column Headers** from the **Format** drop-down menu. Your report will refresh with locked column headers.



A check mark appears if the feature is turned on.

Column Headers remain in view as you scroll down the report.



To toggle this feature on and off, select **Lock Row Headers** again.

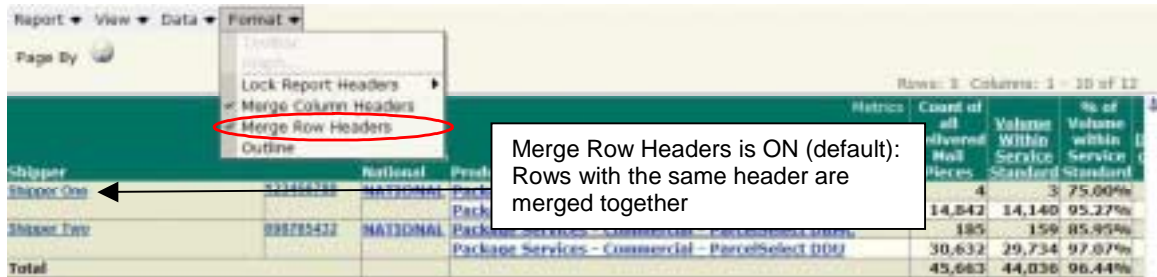
Note: Lock Report Headers works only if Dynamic HTML is on. To set Dynamic HTML, see General Preferences in the Options folder.

6.1.2 Merge Report Headers

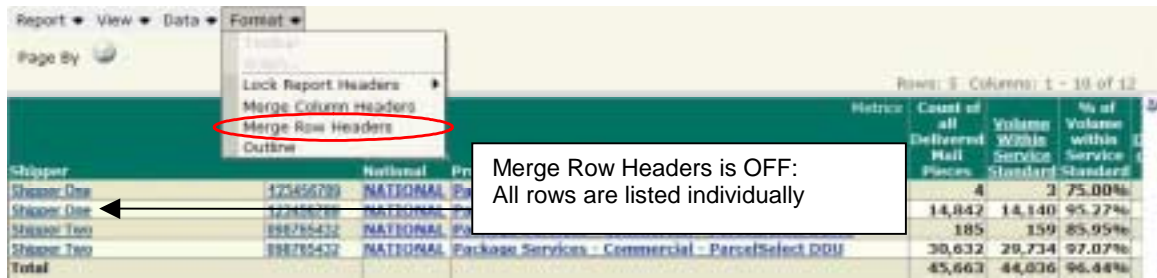
This feature makes reports more legible by combining repeated rows and columns. Rows and columns are merged by default when you run a report.

Merge Row Headers

To merge your row headers, select **Merge Row Headers** from the **Format** drop-down menu. Your report will refresh with merged row headers.



A check mark appears if the feature is turned on.



To toggle row merging on and off, select **Merge Row Headers** from the **Format** drop-down menu again.

Merge Column Headers

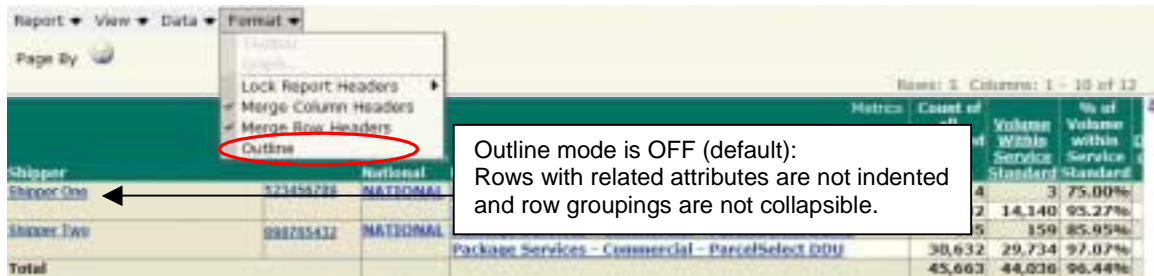
To merge your column headers, select **Merge Column Headers** from the **Format** drop-down menu. A check mark appears if the feature is turned on. To toggle column merging on and off, select **Merge Column Headers** from the **Format** drop-down menu again.

Note: Currently, no Product Performance Reports require merging of columns.

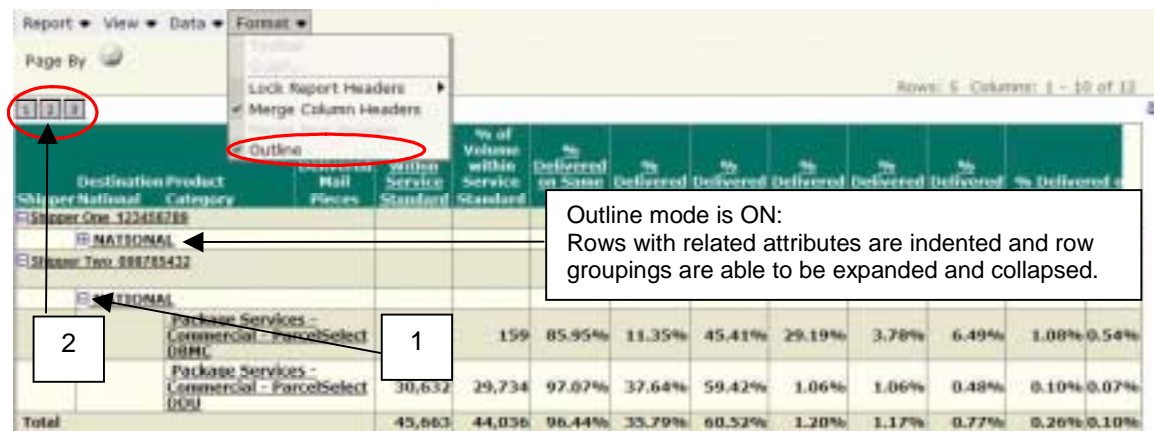
6.1.3 Outline

This feature makes reports more legible by indenting groups of related attributes and making these groupings expandable and collapsible.

To enable outline mode, select **Outline** from the **Format** drop-down menu. Your report will refresh in outline mode.



A check mark appears if the feature is turned on.



To toggle outline mode on and off, select **Outline** from the **Format** drop-down menu again.

Note: You can expand and collapse row groupings by clicking the +/- buttons (1), and you can expand and collapse the report by level by using the numbered buttons (2).

6.2 Customize Report Data

In addition to using MicroStrategy features to customize your report format, you can also use them to customize your report data. Using the features described below, you can manipulate the data and tailor your report to your needs.

6.2.1 Data Pivoting

This feature rearranges the columns and rows in a report so that you can view the data from different perspectives.

To use data pivoting, select **Show Pivot Buttons** from the **View** drop-down menu. Your report will refresh with data pivoting buttons on your grid, and you can use them to rearrange your columns and rows.



A check mark appears if the feature is turned on. To show and hide the pivot buttons, select **Show Pivot Buttons** from the **View** drop-down menu.

These are the available pivot buttons:



Page By—Move this column to the Page By table



Move to Rows—Change this column to a row in the report



Move to Columns—Change this row to a column in the report



Move Left/Move Right—Shift this column horizontally

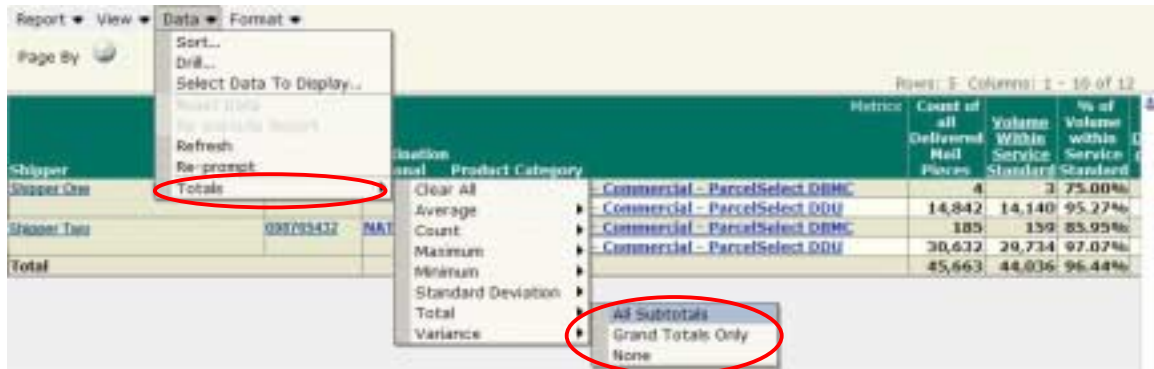


Sort Data—Arrange column data in ascending or descending order

6.2.2 Totals

This feature reflects accumulations at selected attribute levels. There are various totals available, such as count, minimum, maximum, standard deviation, etc.

To display totals on a report, select **Totals** from the **Data** drop-down menu, then select the desired category of Totals from the list. Select **Subtotal** or **Grand Totals Only** for the type of total you choose. Your report will refresh with the selected totals listed.



Note: If the report has only one attribute, Subtotals and Grand Totals will produce the same result since totals are calculated across levels in you report.

Shipper	Shipper One	Shipper Two	Destination	Product Category	Count of all Delivered Mail Pieces	Volume Within Service Standard	% of Volume within Service Standard
	122456789		NATIONAL	Package Services - Commercial - ParcelSelect DBMC	4	3	75.00%
				Package Services - Commercial - ParcelSelect DDU	14,842	14,140	95.27%
				Total	14,846	14,143	95.26%
	998795432		NATIONAL	Package Services - Commercial - ParcelSelect DBMC	185	159	85.95%
				Package Services - Commercial - ParcelSelect DDU	30,632	29,734	97.07%
				Total	30,817	29,893	97.00%
				Total	45,663	44,036	96.44%

6.2.3 Page By

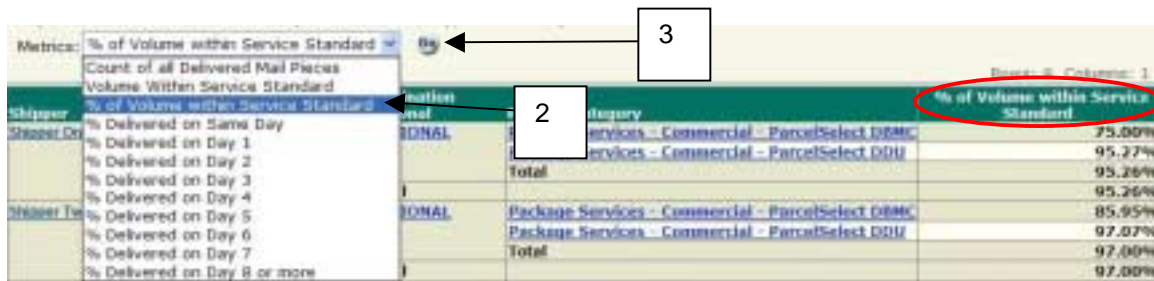
This feature selects and displays subsets of your data as separate pages. This feature is most useful for extremely long reports.

To create page-by fields on a report, drag and drop the header(s) of the column(s) by which you want to separate your pages into the Page By panel.

The following example shows how to view only the metrics for which the Great Lakes Area was the destination on a Service Performance Matrix report:

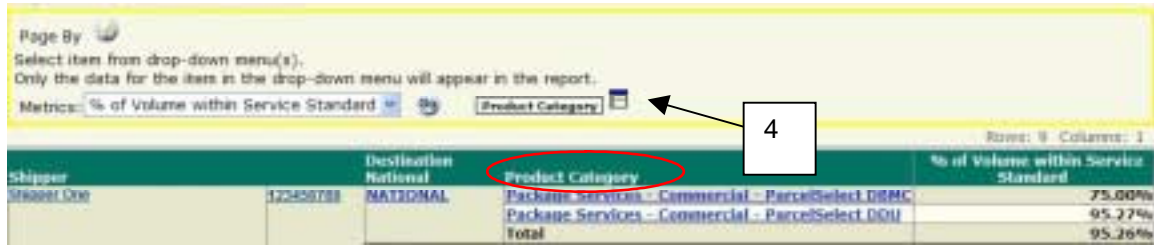


1. Drag and drop the **Metrics** header into the **Page By** panel. The Metrics drop-down menu appears in the Page by panel:



2. Select **% of Volume within Service Standard** from the *Metrics* drop-down menu.
3. Click **Go**. Your report will display only the % of Volume within Service Standard.

You can place more than one object in the Page By field. To further narrow your data to view only the % Failed Value for one product, follow these steps:



4. Drag and drop the **Product Category** header into the Page By panel. The Product Category drop-down menu appears in the Page By panel, next to Metrics:



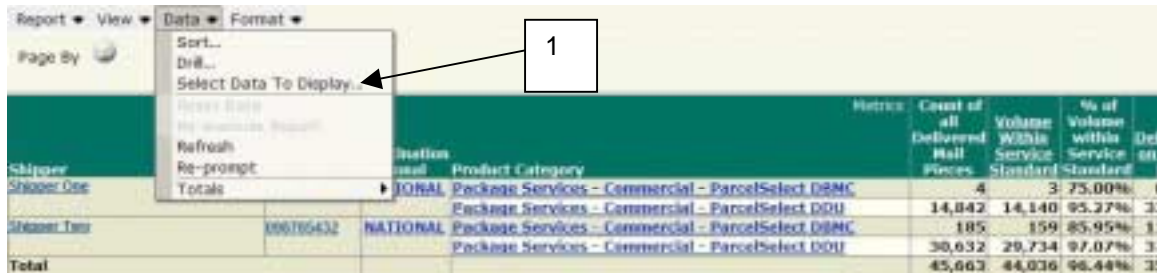
5. Select one of the product categories (in this case, Package Services—Commercial—Parcel Select DDU) from the **Product Category** drop-down menu (leave **% of Volume within Service Standard** in the *Metrics* drop-down).
6. Click **Go**. Your report will display only the % Failed Volume for the Great Lakes destination area.

Note: You can place more than one attribute in the Page By panel. The order of the objects in this panel can influence the list of elements displayed for subsequent columns that you add to the Page By panel.

6.2.4 Select Data to Display

This feature selects specific rows or columns of data to be displayed on your report.

To select specific data, follow these steps:



1. Click on **Select Data to Display** from the **Data** drop-down menu. Check boxes will appear for all rows and columns of the report.



2. Check the rows and columns you want to keep in the report.
3. Click the **OK** button. The report will refresh with only your selected data.

Note: Your original report and the report with selected data will appear as two separate reports in your History folder.

6.2.5 Sorting

This feature sorts data in ascending or descending order.

To sort your data, follow these steps:



1. Select **Sort** from the **Data** drop-down menu. The Sort panel will display.



2. In the Sort panel, select your desired sorting attributes from the **Sort By** drop-down menu.
3. Select the **Ascending** or **Descending** radio button for the given attribute.
4. If necessary, repeat this process for the **Then By** fields.
5. Click **OK**.

Quick Sort

Quick-sort columns by right-clicking on the header and selecting **Sort > Ascending** or **Descending**:



6.2.6 Drilling

This feature allows you to see data at levels other than that of an original report. It allows you to quickly and easily investigate the data in your report.

Left-Click and Right-Click Drill

Allows a user to quickly drill on data elements and attributes within the hierarchies that are present on the report.

The top screenshot shows a table with columns: Shipper, Destination, Product Category, Metrics, Count of all Delivered Mail Pieces, Volume within Service Standard, % of Volume within Service Standard, and Del on. The 'Shipper One' row is highlighted. A box labeled '1' points to the 'Shipper One' cell. A context menu is open over the 'Destination' column header, with a box labeled '2' pointing to the 'Destination ZIP-3' option.

The bottom screenshot shows the same table. A box labeled '3' points to the 'Destination' column header. A context menu is open over the 'Destination' column header, with the 'Destination ZIP-3' option selected.

1. **Left-click on a hyperlinked element** in your report to drill down one level. The resulting data set will be filtered with only data for the element you select.

OR...

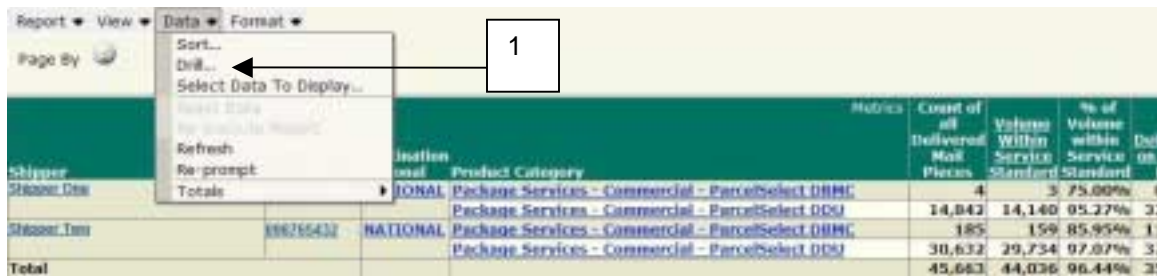
2. **Right-click on a hyperlinked element** in your report to display a pop-up menu from which you can select a drill level. The resulting data set will be filtered with only data for the element you select.

OR...

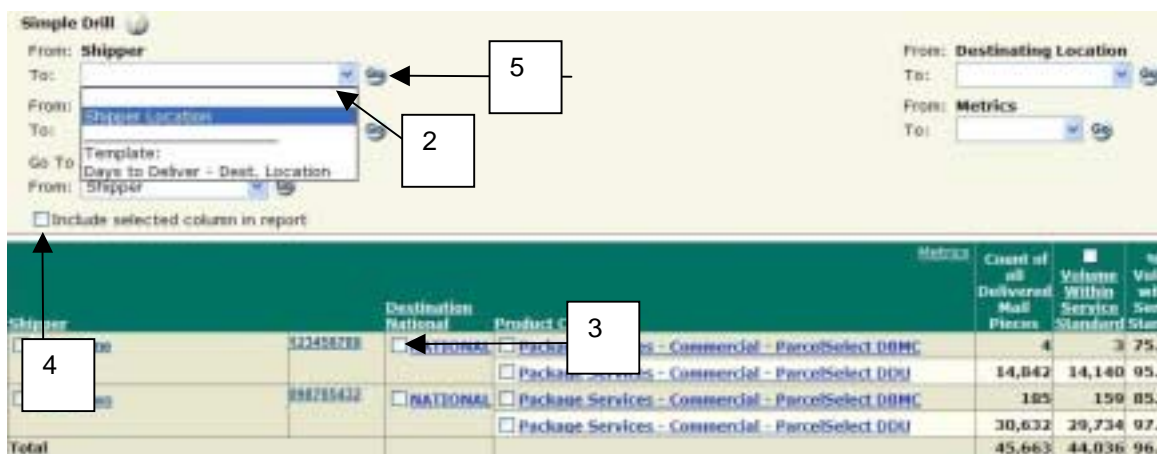
3. **Right-click on a header** in your report to display a pop-up menu from which you can select a drill level. The resulting data set will be filtered with only data for the element you select.

Simple Drill

This feature allows drilling in a similar manner to the right-click drill method, within the hierarchies displayed on your report.



1. Select **Drill** from the **Data** drop-down menu. The Simple Drill panel will be displayed:



2. Select the level to which you want to drill in the **To** drop-down menus. (In the example above, the user has selected to drill from Origin Area to Origin District.)
3. Notice that all rows have checkboxes in front of them. Check the boxes of the rows on which you want to drill.
4. If you want to include the level from which you are drilling in your report, check the box next to **Include Selected Column in Report**. If you leave this box unchecked, your report will not show the column from which you drilled.
5. Click the **Go** button to display your report. Your report refreshes with the Origin District information:

Advanced Drill

This feature allows drilling to a completely different hierarchy than those currently included in the report.



	Destination	Category	Metric	Count of all Delivered Mail Pieces	Volume Within Service Standard	% of Volume within Service Standard	Def on
Shipper	National	Services - Commercial - ParcelSelect DBMC		4	3	75.00%	0
Shipper	National	Services - Commercial - ParcelSelect DDU		14,842	14,140	95.27%	32
Shipper	National	Services - Commercial - ParcelSelect DBMC		185	159	85.95%	11
Shipper	National	Package Services - Commercial - ParcelSelect DDU		30,632	29,734	97.07%	37
Total				45,663	44,036	96.44%	35

1. Right-click on your report and select **Drill > More Options**. The Advanced Drill panel will be displayed:



Advanced Drill

To add new data to report, select a **Hierarchy** and **Hierarchy Level**, then click the **Go** button.

From: **Shipper**

Select Hierarchy: Origin Location

Select Hierarchy Level: Product

Include Shipper column in report

	Destination	Category	Metric	Count of all Delivered Mail Pieces	Volume Within Service Standard	% of Volume within Service Standard	Def on
Shipper One	NATIONAL	Package Services - Commercial - ParcelSelect DBMC		4	3	75.0	
Shipper One	NATIONAL	Package Services - Commercial - ParcelSelect DDU		14,842	14,140	95.27	
Shipper One	NATIONAL	Package Services - Commercial - ParcelSelect DBMC		185	159	85.95	
Shipper One	NATIONAL	Package Services - Commercial - ParcelSelect DDU		30,632	29,734	97.07	
Total				45,663	44,036	96.44	

2. Select the hierarchy in which you want to drill from the list in the **Select Hierarchy** box.
3. Select the hierarchy level to which you want to drill in the **To Hierarchy** drop-down menu.
4. Notice that all rows have checkboxes in front of them. Check the boxes of the rows on which you want to drill.
5. Click the **Go** button to display your report.

6.3 Using Report Tools

After customizing your report format and data, there are several tools available to help you print, export, save, and re-execute your report.

6.3.1 Print

To print your report, select **Print** from the **Report** drop-down menu or click the **Print** button.



A pop-up Print Options window will appear; verify your print options and click **Print**.

The selection summary will print on the first page and your report will follow:

Total number of rows: 5

Total number of columns: 12

Selection Summary:

Service Exclude Indicator (ID) = '0' And Destination National = NATIONAL And Origin National = NATIONAL And Product <> Express Mail And Origin National = NATIONAL And Month = JAN 2004 And Shipper = SHIPPER ONE: 123456789 or SHIPPER TWO: 098765432 And Product Category <> Package Services - Commercial - ParcelSelect DBMC or Package Services - Commercial - ParcelSelect DDU And IsNotNull(Scheduled Delivery Date (SD)) And (Origin National = NATIONAL) And IsNotNull(Delivery Days Count (ID))

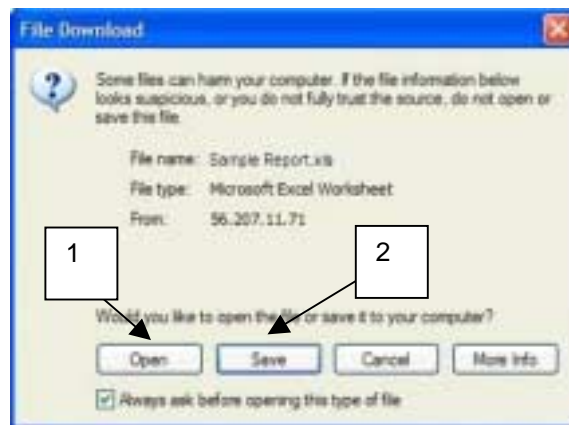
Shipper ID	Origin	Product Category	Count of all Delivered Mail Pieces	Volume Within Service Standard	% of Volume within Service Standard	% Delivered on Same Day	% Delivered on Day 1	% Delivered on Day 2	% Delivered on Day 3	% Delivered on Day 4	% Delivered on Day 5	% Delivered on Day 6	% Delivered on Day 7	% Delivered on Day 8 or later
SHIPPER ONE	NATIONAL	Priority Mail - Commercial - DropShip	375	341	90.93%	27.73%	57.87%							
SHIPPER TWO	NATIONAL	Package Services - Commercial - Other	21,703	14,100	64.97%	2.85%	5.47%							

6.3.2 Export

To export your report to Excel, select **Export** from the **Report** drop-down menu or click the **Export** button.



You will be asked whether you want to open the report immediately or save it; make your selection and click the appropriate button.



Note: (1) Clicking **Open** will open your report in Excel format in a pop-up window. You may then make any modifications and save your report. (2) Clicking **Save** will open a pop-up window and you can save your report without opening it.

6.3.3 PDF

This feature allows you to export your report to Portable Document Format (PDF), which makes it a read-only file.

To export a report to PDF, select **PDF** from the **Report** drop-down menu or click the **PDF** button.



Note: To view PDF files, you must have Adobe's Acrobat Reader software (version 4 or greater) installed on your computer.

6.3.4 Re-prompt

This feature allows you to modify your prompt selections in order to re-run a report.

To use the re-prompt feature, select **Re-Prompt** from the **Data** drop-down menu or click the **Re-prompt** button.



The first prompt for the report will appear, and you can change any of your selections prior to re-executing the report.

Note: Once you re-prompt a report, your newly generated report will replace the old report in your History folder.

6.3.5 Refresh

This feature allows you to re-run your report and update it with current data.

To use the refresh feature, select **Refresh** from the **Data** drop-down menu or click the **Refresh** button. Your report will re-execute.

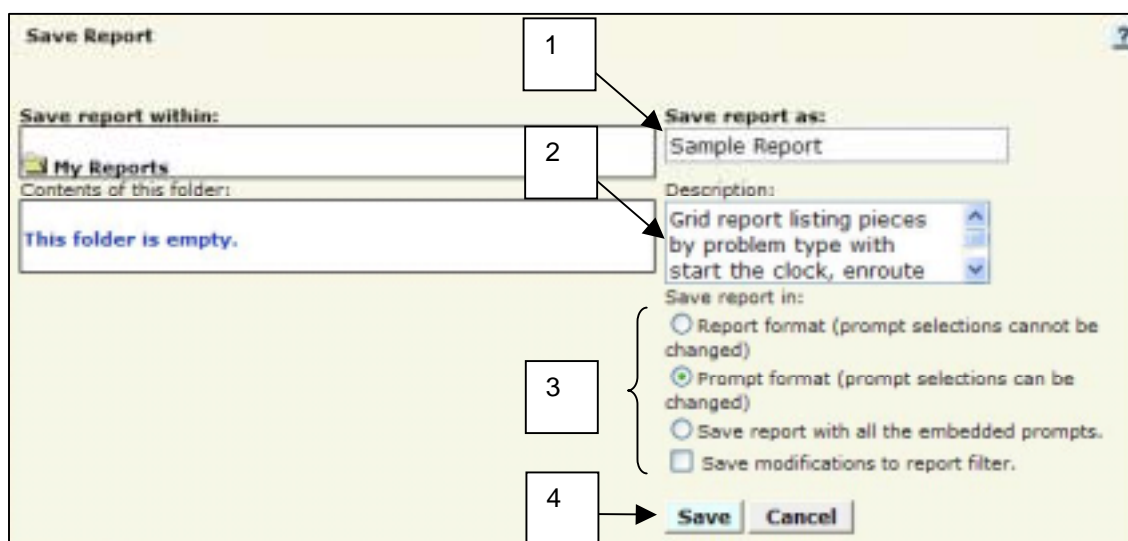


6.3.6 Save

To save your report, select **Save As** from the **Report** drop-down menu or click the **Save** button.



The **Save Report** window will appear:



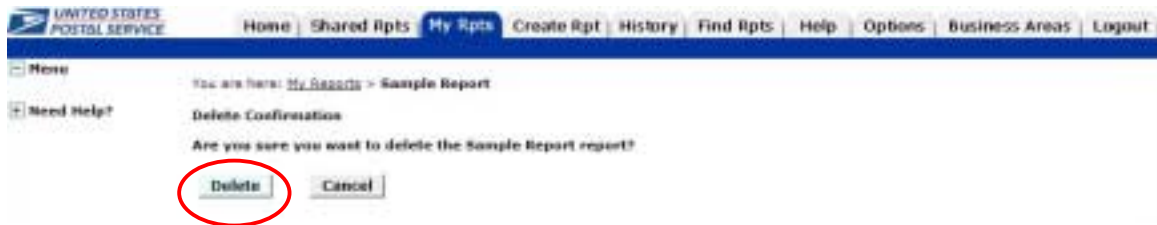
1. Type a name for your report in the **Save Report As** box.
2. If desired, type a description for your report in the **Description** box.
3. Select the format for your report. You have the following options when saving your report:
 - **Save report in Report format (prompt selections cannot be changed)**—This option saves the report, but does not allow the user to re-execute the report with different selection prompts.
 - **Save report in Prompt format (prompt selections can be changed)**—This option saves the report, and does allow the user to re-execute the report with different selection prompts.
 - **Save report with all the embedded prompts**— Currently, Product Performance Reports do not contain embedded prompts. Thus, this save option functions in the same way as the “Save report in Prompt format” option.
4. Click **Save**. Your report will be saved to the My Reports folder.

6.3.7 Delete

To delete a report from the My Reports folder, select the **My Reports** tab and click the **Delete** report link for the report that you wish to delete.



Click **Delete** again on the Delete Confirmation screen, and your report is permanently deleted from the My Reports folder.



6.3.8 Report Details

The Report Details page lists information related to the report that can be useful when troubleshooting problems. To access the Report Details screen, select **Report Details** from the **Report** drop-down menu.



The following information is available on the Report Details page:

- Report name
- Total number of rows
- Total number of columns
- Server name
- Report path
- Message ID
- Report ID
- Status
- Message created
- Message last updated
- Start time
- Finish time
- Owner
- Report description
- Template
- Selection Summary
- View Filter
- Template Details
- SQL Statement

7.0 Product Performance Reports

7.1 Product Performance Reports Overview

The Product Performance Reports provide service and delivery performance information. The reports provide information regarding acceptance, receipt, processing and delivery of mail in the Postal distribution and delivery networks. The Product Performance reports are located in the Shared Reports folder. The following reports area available:

- Delivery Success (Customer Data)
- Cumulative Delivery Success (Customer Data)

- Days to Deliver (Customer Data)
- Cumulative Days to Deliver (Customer Data)

- Days to Deliver—Parcel Select (Customer Data)
- Cumulative Days to Deliver—Parcel Select (Customer Data)

7.2 Delivery Success (Customer Data)

The Delivery Success (Customer Data) report provides information on how many days passed between the first attempted delivery of a mailpiece and when it was picked up.

7.2.1 Screenshot

An example of a Delivery Success Report (Customer Data) is shown here.

Destination Area	Pieces		% Delivered 1st Attempt	% of Pieces						% Undelivered		% Return		
	Total Scanned	Delivery Attempt		Up on Day 1		Up on Day 2		Up on Day 3		Up on Day 4	Up on Day 5		Up on Day 6	% Undelivered
				Redelivered/Picked Up	Redelivered/Picked Up	Redelivered/Picked Up	Redelivered/Picked Up							
CAPITAL METRO	938,427	875,033	93.15%	35.48%	24.58%	17.68%	6.77%	3.87%	2.51%	9.19%	0.89%	0.55%		
EASTERN	3,898,237	2,892,181	93.32%	39.48%	25.88%	15.38%	6.38%	3.48%	2.37%	7.91%	0.85%	0.34%		
NORTHEAST	1,589,878	1,446,385	91.02%	46.80%	24.82%	12.88%	5.15%	2.90%	1.89%	6.32%	0.84%	0.63%		
Total	5,627,734	5,213,599	92.64%	41.38%	24.65%	14.82%	6.02%	3.34%	2.22%	7.56%	0.86%	0.46%		

7.2.2 Report Attributes

The attributes on the Delivery Success (Customer Data) report are as follows:

Column Heading	Description
Total pieces scanned	Count of mailpieces with an attempted or delivered or arrival at pick up scan.
Total pieces delivered 1 st attempt	Count of mailpieces with only a delivered event scan
% of pieces delivered 1 st attempt	Total pieces delivered 1 st attempt / total pieces scanned
% of pieces redelivered / picked up on same day	% of pieces with an arrival at pick up point or attempted scan and a delivered scan and the difference between the arrival at pick up point or attempted and the delivered scan for 0 days
% of pieces redelivered / picked up on day 1	% of pieces with an arrival at pick up point or attempted scan and a delivered scan and the difference between the arrival at pick up point or attempted and the delivered scan for 1 days
% of pieces redelivered / picked up on day 2	% of pieces with an arrival at pick up point or attempted scan and a delivered scan and the difference between the arrival at pick up point or attempted and the delivered scan for 2 days
% of pieces redelivered / picked up on day 3	% of pieces with an arrival at pick up point or attempted scan and a delivered scan and the difference between the arrival at pick up point or attempted and the delivered scan for 3 days
% of pieces redelivered / picked up on day 4	% of pieces with an arrival at pick up point or attempted scan and a delivered scan and the difference between the arrival at pick up point or attempted and the delivered scan for 4 days
% of pieces redelivered / picked up on day 5	% of pieces with an arrival at pick up point or attempted scan and a delivered scan and the difference between the arrival at pick up point or attempted and the delivered scan for 5 days
% of pieces redelivered / picked up on day 6+	% of pieces with an arrival at pick up point or attempted scan and a delivered scan and the difference between the arrival at pick up point or attempted and the delivered scan for 6 or more days
% unclaimed	% of pieces with an arrival at pickup point or attempted scan and a delivered scan and an unclaimed scan code.
% with no delivery of return scan	% of pieces with an arrival at pickup point or attempted scan and no refused scan and no such number, insufficient address, moved, left no address, forward expired, addresses unknown, vacant, unclaimed, deceased or other scan.

7.2.3 Selection Prompts

The Delivery Success (Customer Data) report includes the following selection prompts:

1. Product / Service
2. Destination Location
3. Time Period
4. Start Date
5. End Date
6. Shipper
7. Customer

7.3 Days to Deliver (Customer Data)

This service performance report provides service information from originating location by on time percentage and percentage delivered by day. This report provides details on volume, volume within service standard and volume delivered by day.

The Cumulative Days to Deliver (Customer Data) report contains attributes similar to the Days to Deliver (Customer Data) report except that the data in each day's column includes the pieces delivered in the previous days.

7.3.1 Screenshot

An example of the Days to Deliver (Customer Data) report is shown here:

Origin	Product Category	Metrics		% of Volume within Service Standard	% Delivered on Same Day	% Delivered on Day 1	% Delivered on Day 2	% Delivered on Day 3	% Delivered on Day 4	% Delivered on Day 5	% Delivered on Day 6	% Delivered on Day 7	% Delivered on Day 8 or more
		Count of all Delivered Mail Pieces	Volume Within Service Standard										
NATIONAL	Priority Mail - Commercial - Other	2,272,348	2,068,996	91.05%	6.33%	43.91%	39.29%	6.09%	2.09%	1.11%	0.50%	0.23%	0.44%
	Priority Mail - Commercial - DropShip	15,369	13,937	90.68%	13.59%	41.94%	34.87%	4.37%	1.98%	1.23%	0.55%	0.35%	1.13%
	Priority Mail - Retail - All	4,471,890	3,866,414	86.46%	0.09%	11.97%	62.64%	18.96%	3.57%	1.52%	0.60%	0.27%	0.38%
Total		6,759,607	5,949,347	88.01%	2.22%	22.78%	54.73%	14.60%	3.07%	1.38%	0.57%	0.26%	0.40%

7.3.2 Report Attributes

The attributes on the Days to Deliver (Customer Data) report are as follows:

Column Heading	Description
Count of all Delivered Mailpieces	Total number of mailpieces delivered
Volume within Service Standard	Count of mailpieces with earliest stop the clock event on or before the scheduled delivery date/time
% of Volume within Service Standard	Percentage of mailpieces with earliest stop the clock event on or before the scheduled delivery date. (Total volume – failed volume / total volume).
% Delivered on Same Day	% of mailpieces that were delivered on same day.
% Delivered on Day 1	% of mailpieces that were delivered on day 1
% Delivered on Day 2	% of mailpieces that were delivered on day 2
% Delivered on Day 3	% of mailpieces that were delivered on day 3
% Delivered on Day 4	% of mailpieces that were delivered on day 4
% Delivered on Day 5	% of mailpieces that were delivered on day 5
% Delivered on Day 6	% of mailpieces that were delivered on day 6
% Delivered on Day 7	% of mailpieces that were delivered on day 7
% Delivered on Day 8 +	% of mailpieces that were delivered on days 8 or more

7.3.3 Selection Prompts

The Days to Deliver (Customer Data) includes the following selection prompts.

1. Origin Location
2. Product / Service
3. Time Period
4. Start Date
5. End Date
6. Shipper
7. Customer
8. Group Results By

7.4 Days to Deliver – Parcel Select (Customer Data)

This service performance report provides service information from originating Bulk Mail Centers to Destination Delivery Units by on time percentage and percentage delivered by day.

The Cumulative Days to Deliver – Parcel Select (Customer Data) report contains attributes similar to the Days to Deliver – Parcel Select report except that the data in each day’s column includes the pieces delivered in the previous days.

7.4.1 Screenshot

An example of the Days to Deliver – Parcel Select (Customer Data) report is shown here. Though not shown, this report continues up to 8 or more days.

Destination Area	Service Standard	Count of all Delivered Mail Pieces	Volume within Service Standard	% of Volume within Service Standard	% Delivered on Same Day	% Delivered on Day 1	% Delivered on Day 2	% Delivered on Day 3	% Delivered on Day 4	% Delivered on Day 5	% Delivered on Day 6
DALEPC	Package Services - Commercial - ParcelSelect DBMC - 2 Day	16	3	18.75%	6.25%	0.00%	12.50%	0.00%	12.50%	12.50%	31.25%
Total		16	3	18.75%	6.25%	0.00%	12.50%	0.00%	12.50%	12.50%	31.25%

7.4.2 Report Attributes

The Days to Deliver – Parcel Select (Customer Data) report attributes are as follows:

Column Heading	Description
Count of all Delivered Mailpieces	Total number of mailpieces delivered
Volume within Service Standard	Count of mailpieces with earliest stop the clock event on or before the scheduled delivery date/time
% of Volume within Service Standard	Percentage of mailpieces with earliest stop the clock event on or before the scheduled delivery date. (Total volume – failed volume / total volume).
% Delivered on Same Day	% of mailpieces with Attempt and Deliver scan on the same day
% Delivered on Day 1	% of mailpieces delivered on day 1.
% Delivered on Day 2	% of mailpieces delivered on day 2.
% Delivered on Day 3	% of mailpieces delivered on day 3.
% Delivered on Day 4	% of mailpieces delivered on day 4.
% Delivered on Day 5	% of mailpieces delivered on day 5.
% Delivered on Day 6	% of mailpieces delivered on day 6.
% Delivered on Day 7	% of mailpieces delivered on day 7.
% Delivered on Day 8	% of mailpieces delivered on day 8 or greater.

7.4.3 Selection Prompts

The Days to Deliver – Parcel Select (Customer Data) report includes the following selection prompts.

1. Product / Service
2. Bulk Mail Center
3. Time Period

4. Start Date
5. End Date
6. Shipper
7. Customer
8. Group Results By

8.0 Getting Help

8.1 Help Folder

To access the Help folder, click the **Help** link on the Home page. A separate browser window will launch, and you will be able to search for help topics using the three tabs at the top of the screen. Use the **Index** tab for alphabetical searching, the **Contents** tab for topical searching, or the **FAQs** tab for Frequently Asked Questions.



8.2 Context Sensitive Help Buttons

Product Performance CAT - Service Performance Matrix - Microsoft Internet Explorer

UNITED STATES POSTAL SERVICE

Home | Shared Rpts | My Rpts | Create Rpt | History | Find Rpts | Help | Options | Business Areas | Logout

Product Performance CAT

You are here: Shared Reports > Service Performance

Service Performance Matrix

Report View Data Format

Page By

Simple Drill

From: Metrics To: From: Origin Area To: Go To Advanced Drill From: Destination Area To: From: Destination Area To: Include selected column in report

Click the question mark button to display online help on how to use the Drill feature. Online help for the drill feature is displayed in a separate window:

Region	Destination Area	CAPITAL	GREAT	NEW YORK	MID-ATLANTIC	Total					
CAPITAL METRO		98.30%	96.87%	95.29%	93.56%	95.27%	95.89%	96.17%	96.64%	96.88%	96.61%
EASTERN		95.77%	97.33%	95.56%	93.63%	95.38%	95.19%	95.97%	96.55%	96.05%	96.07%

Product Performance CAT II - Help - Contents - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://96.207.11.7/UtilityHelp.asp?lang=EN&SPAQID=00tab=2&CenterId=4

UNITED STATES POSTAL SERVICE

Index Contents FAQs

Drill Help

New Functionality Guide

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Drilling

Drilling
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Drilling
 Drilling allows you to navigate to different levels of information within a report. Levels of information are defined in your business model, which represents the way your business is structured.

You can drill from one level of information to lower or higher levels of detail. For example, if your data is organized by regions, markets, and stores, and you run a report that shows region sales, you can drill down from the region level to see the sales for the markets that make up that region. Conversely, you can drill up from stores to view the markets to which those stores belong.

This hierarchical relationship is sometimes referred to as a parent-child relationship. In the preceding example, region is the **parent** of market; market is the **child** of region and the **parent** of store; store is the **child** of market.

Another type of hyperlink drilling appears if **compound metrics** exist in the report. You can click the **Metrics** title and break down the compound metrics to their simple metrics. This is the same as performing a simple drill and selecting "drill to child metrics" with no rows or columns selected.

Hyperlink drilling
 If an object on a grid has a default drilling option, the elements of that object will appear as hyperlinks on the grid. You can drill on these elements by simply clicking the hyperlink, which will launch a new report at the new level of detail. If you place the mouse pointer over the hyperlink, a tooltip displays the drill location.

Click the "X" button to close this window.

8.3 Help Desk

If you need help or have questions about your account or registration process, please contact Customer Support at 1-800-238-3150 (Mon-Fri 7:00 AM – 5:00 PM Central) or forward an email to: incs@usps.gov.

If you have questions or comments about the Product Performance reports forward an email to: rfisher1@email.usps.gov.