

# DeepSee User Guide

Version 2010.1  
17 February 2010

*DeepSee User Guide*

Caché Version 2010.1 17 February 2010

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# About This Book

This book describes how to work with the dashboards and pivot tables that have been added to the applications you use. It is intended to supplement any application-specific documentation you may receive. This book contains the following sections:

- [Introduction to Dashboards and Pivot Tables](#)
- [Using Dashboards](#)
- [Using Pivot Tables](#)
- [Using Charts](#)
- [Using Detail Listings](#)
- [Using Venn Diagrams](#)

For a detailed outline, see the [table of contents](#).

For more information, see the following books:

- [Overview of DeepSee](#), which gives an introduction to DeepSee, the technology that was used to create your dashboards.
- [Using the DeepSee Analyzer](#), which describes how to use the DeepSee Analyzer. Some of the advanced options that you might have for pivot tables and charts are also available within this module and are documented in this book.
- [Using the DeepSee Dashboard Designer](#), which describes how to modify and create dashboards. You may or may not have access to this module.



# 1

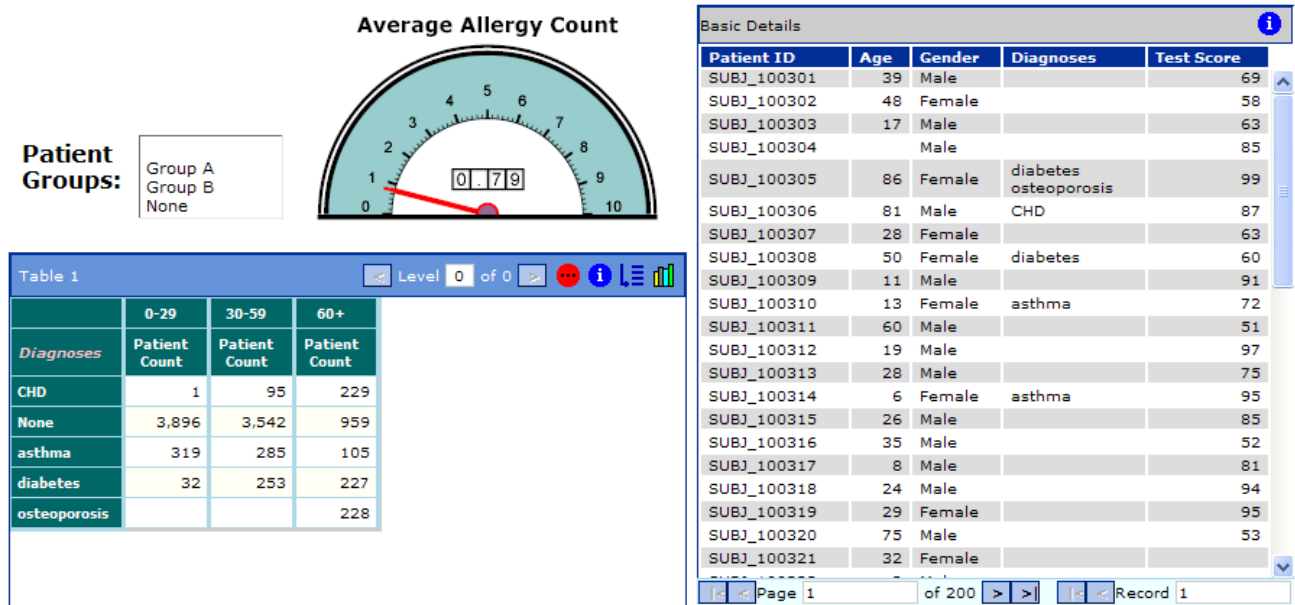
## Introduction to Dashboards

This book is written for users, rather than for implementers or system administrators. It describes how to work with dashboards and with the pivot tables and other elements in them. This book is intended to supplement any application-specific documentation you may receive.

A dashboard is a Web page included in your application. It provides a high-level, interactive view of your application data and helps you analyze it.

The following shows a simple example:

Logged in as: user1  
Current date and time: 12 Aug 2009 04:43:31PM



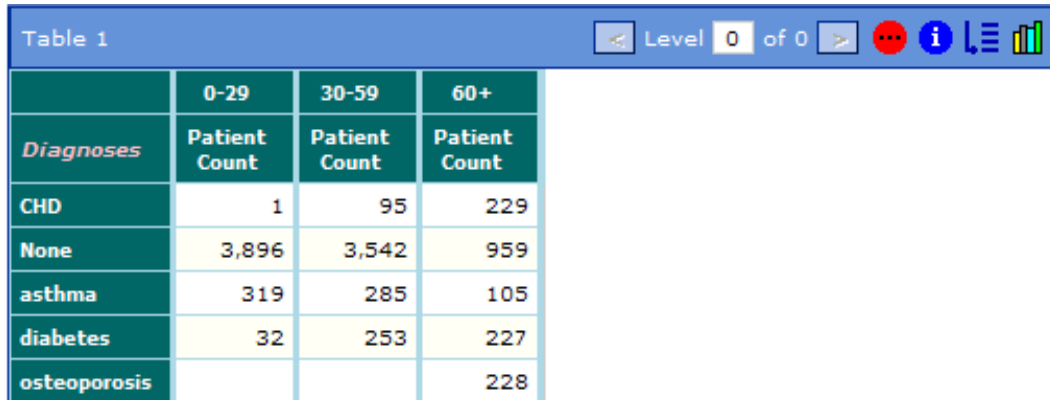
A dashboard can include the following elements:

- Pivot tables (such as the item labeled Table 1 in this example)
- Detail listings (such as the item labeled Basic Details)
- Speedometers that display KPIs (key performance indicators) (such as the item labeled Average Allergy Count)
- Static and dynamic text
- Graphics
- Elements such as drop-down menus, check boxes, and so on

- Buttons, with or without graphics on them
- Frames that display Web pages or other dashboards
- Venn diagrams (less common)

Dashboards are extremely configurable but all contain some common options.

A dashboard can (and usually does) include a pivot table, which displays aggregated data that analyzes items of a particular type. In the example here, the analyzed item is the patient:



The image shows a screenshot of a pivot table interface. At the top, there is a blue header bar with the text 'Table 1' on the left and navigation controls on the right, including a left arrow, 'Level 0 of 0', a right arrow, a red circle with three dots, an information icon, a list icon, and a bar chart icon. Below the header is a table with a dark green header and alternating light green and white rows. The table has four columns: 'Diagnoses', '0-29', '30-59', and '60+'. The first column lists diagnoses: CHD, None, asthma, diabetes, and osteoporosis. The next three columns show the 'Patient Count' for each diagnosis in the respective age group.

	0-29	30-59	60+
<i>Diagnoses</i>	Patient Count	Patient Count	Patient Count
CHD	1	95	229
None	3,896	3,542	959
asthma	319	285	105
diabetes	32	253	227
osteoporosis			228

The purpose of a pivot table is to support data analysis. As you will see later in this book, you can drill into or drill down and see different slices of the data. You can also view the lowest-level records for any cell in a pivot table.

Pivot tables are extremely configurable but all contain some common options.

# 2

## Using Dashboards

This chapter describes how to use dashboards. It discusses the following topics:

- [How to identify the data elements shown in a dashboard](#)
- [How to filter the data shown in a dashboard](#)
- [How to work with frames](#)
- [How to save and reuse your selections on a dashboard](#)
- [Basic information on all the right-click options in a dashboard](#)
- [Other options you might have](#)

### 2.1 Identifying the Data Elements

Because the primary purpose of a dashboard is to display data, it is important to understand the kinds of data it can show and how it presents this data.

First, a dashboard can include two types of tables: pivot tables and detail listings. You can tell them apart by appearance. If a pivot table has a banner, the banner is blue and has multiple icons in the right, like this:



In contrast, every detail listing has a gray banner with one icon, like this:



Also, pivot tables can use any color theme, but detail listings are always displayed with alternating grey and white rows.

#### 2.1.1 Pivot Tables

Pivot tables display aggregate data for items of a particular type. An example follows:

Table 1			
	0-29	30-59	60+
<i>Diagnoses</i>	Patient Count	Patient Count	Patient Count
CHD	1	95	229
None	3,896	3,542	959
asthma	319	285	105
diabetes	32	253	227
osteoporosis			228

Each row in this table represents aggregate data for patients. For example, the row for CHD indicates that there was 1 patient in the age range of 0–29 with this diagnosis. Similarly, there were 95 patients in the age range 30–59 with this diagnosis, and 229 patients aged 60 and up.

## 2.1.2 Detail Listings

A dashboard can also display detail listings, which display selected fields from the source data. An example follows:

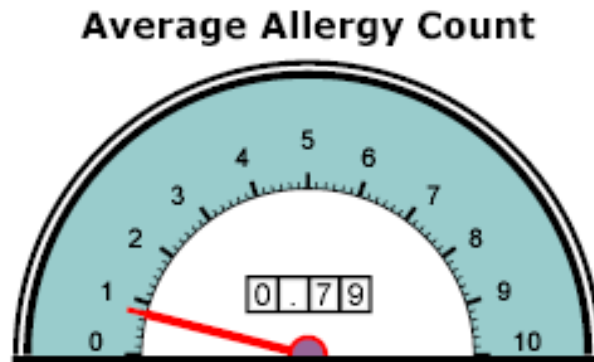
Basic Details				
Patient ID	Age	Gender	Diagnoses	Test Score
SUBJ_100301	39	Male		69
SUBJ_100302	48	Female		58
SUBJ_100303	17	Male		63
SUBJ_100304		Male		85
SUBJ_100305	86	Female	diabetes osteoporosis	99
SUBJ_100306	81	Male	CHD	87
SUBJ_100307	28	Female		63
SUBJ_100308	50	Female	diabetes	60
SUBJ_100309	11	Male		91
SUBJ_100310	13	Female	asthma	72
SUBJ_100311	60	Male		51
SUBJ_100312	19	Male		97
SUBJ_100313	28	Male		75
SUBJ_100314	6	Female	asthma	95
SUBJ_100315	26	Male		85
SUBJ_100316	35	Male		52
SUBJ_100317	8	Male		81
SUBJ_100318	24	Male		94
SUBJ_100319	29	Female		95
SUBJ_100320	75	Male		53
SUBJ_100321	32	Female		

Page 1 of 200 Record 1

Each row in this table represents selected parts of the lowest-level data in your system. This is the transactional data if you have a transactional system.

### 2.1.3 Speedometers

A speedometer displays the value of a KPI (key performance indicator). This value represents an aggregate number that is important to your organization. For example:



If you right-click in a speedometer, you have the following options:

- **Zoom In** magnifies the display.
- **Zoom Out** reduces the display.
- **Original Display** redisplay the speedometer in its original state.
- **Detail Listing** displays a detail listing or a choice of detail listings as appropriate.
- **Info** displays an dialog box with details about this KPI.

## 2.2 Filtering Data

In many dashboards, the purpose of the drop-down lists and other elements is to filter the data that the dashboard shows. For example:

**Patient  
Groups:**

Group A  
Group B  
None

If you clicked one or more patient groups, the dashboard would be updated to show only data for those patient groups. For example:

Logged in as: user1  
 Current date and time: 12 Aug 2009 05:15:59PM

**Average Allergy Count**

**Patient Groups:**

- Group A
- Group B
- None

**Basic Details**

Patient ID	Age	Gender	Diagnoses	Test Score
SUBJ_100301	39	Male		69
SUBJ_100302	48	Female		58
SUBJ_100303	17	Male		63
SUBJ_100304		Male		85
SUBJ_100305	86	Female	diabetes osteoporosis	99
SUBJ_100306	81	Male	CHD	87
SUBJ_100307	28	Female		63
SUBJ_100308	50	Female	diabetes	60
SUBJ_100309	11	Male		91
SUBJ_100310	13	Female	asthma	72
SUBJ_100311	60	Male		51
SUBJ_100312	19	Male		97
SUBJ_100313	28	Male		75
SUBJ_100314	6	Female	asthma	95
SUBJ_100315	26	Male		85
SUBJ_100316	35	Male		52
SUBJ_100317	8	Male		81
SUBJ_100318	24	Male		94
SUBJ_100319	29	Female		95
SUBJ_100320	75	Male		53
SUBJ_100323	1	Female		67

**Patient Count by Diagnoses**

Diagnoses	0-29	30-59	60+
	Patient Count	Patient Count	Patient Count
CHD	1	73	183
None	3,127	2,790	770
asthma	254	226	88
diabetes	31	189	179
osteoporosis			181

For another example:

Logged in as: user1  
 Current date and time: 12 Aug 2009 05:00:21PM

**ZIP Code:**

**City:**

**Find**

**Table 1**

Diagnoses	0-29	30-59	60+
	Patient Count	Patient Count	Patient Count
CHD	1	95	229
None	3,896	3,542	959
asthma	319	285	105
diabetes	32	253	227
osteoporosis			228

In this case, you choose the items from the drop-down lists and then click **Find**.

In some cases, one filter might apply to another filter. In the next example, if you select a ZIP code from the upper drop-down list, the dashboard filters the list of cities in the second drop-down list. If you select 32007, for example, you see one city:

**ZIP Code:**

**City:**

In contrast, if you select 34577, you see a different set of cities:

**ZIP Code:**

**City:**   
Magnolia  
Pine

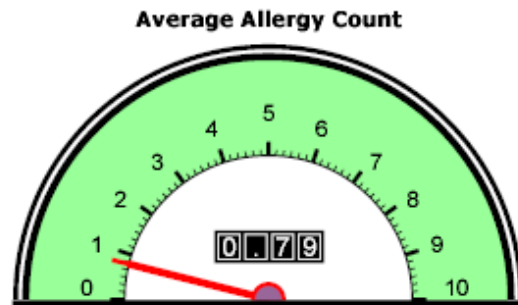
## 2.3 Frames

A dashboard can include frames, which can display Web pages or other dashboards. In this case, the main dashboard typically has buttons or other controls to specify what to display in the frame. For example:

Logged in as: user1  
12 August 2009 06:32:07PM

- Diagnoses**
- Diagnosis Details
- Geographic Details
- Age Details
- Alerts

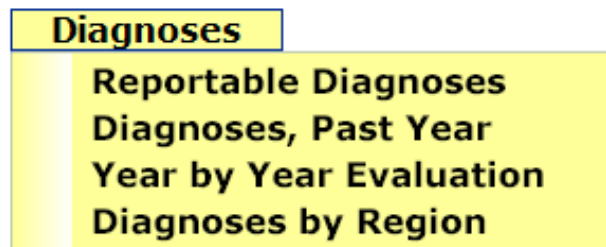
Group A  
Group B  
None



Patient Count by Diagnosis			
	0-29	30-59	60+
<i>Diagnoses</i>	Patient Count	Patient Count	Patient Count
CHD	4	83	242
asthma	301	299	103
diabetes	29	254	277
osteoporosis			226

In this example, if you click the buttons on the left, the dashboard displays a new sub-dashboard in the frame on the right.

In other cases, the dashboard may include *drop-down menus*. A drop-down menu is initially displayed as a button. When you click the button, DeepSee displays a list. For example:



Each item in the list corresponds to a dashboard or other DeepSee module. When you then click an item in the list, the frame is refreshed to show the requested dashboard or module.

## 2.4 Saving and Reusing Selections

Many dashboards provide options that you use to filter the data that you see. For example, you might click a department name, which updates the dashboard to show data for that department. Or you might specify a date.

You can save such selections and reuse them later (even in a later login session), via three options:

- To save the current selections on a given dashboard, right-click and then click **Save Parameter**. The selections on this dashboard are immediately saved.
- To reuse any saved selections for a given dashboard, right-click and then click **Reload Saved Parameter**. The drop-down lists, check boxes, and other such items are all immediately updated to show what was saved for this dashboard. Depending on the design of the dashboard, the data shown may also be updated immediately.
- To clear any saved selections for a given dashboard, right-click and then click **Clear Saved Parameter**.

## 2.5 Right-click Options

In all dashboards, you can right-click in different locations to access menus:

- If you right-click in the dashboard itself (outside of any of the elements that it contains), you access the dashboard options that are discussed in the following subsection.
- If you right-click in a pivot table, you access options for the pivot table. See the chapter “[Using Pivot Tables](#).”
- If you right-click in a chart, you access options for chart table. See the chapter “[Using Charts](#).”
- If you right-click in a detail listing, you access options for the detail listing. See the chapter “[Using Detail Listings](#).”
- If you right-click in a speedometer, you access options for the speedometer. See “[Speedometers](#),” earlier in this chapter.

**Note:** You may or may not have permission to use all these options.

### 2.5.1 Dashboard Options

In a dashboard, if you right-click, the system displays the following options.

- **Edit Dashboard** — Displays the dashboard in edit mode. See *Using the DeepSee Dashboard Designer*.
- **New Dashboard** — Displays options for creating new dashboards. See *Using the DeepSee Dashboard Designer*.
- **Open Dashboard** — Enables you to open another dashboard. The system displays a list of folders (these are virtual folders inside the database, not actual folders). Expand them as needed, click the dashboard name, and click **OK**.
- **Recent Dashboard** — Enables you to open a recently used dashboard. The system displays a list of dashboards. Click the dashboard name and click **OK**. Or click **More...** at the bottom of the list, click a dashboard name, and click **OK**.
- **Save Parameter, Reload Saved Parameter, and Clear Saved Parameter** — See “[Saving and Reusing Your Selections](#),” earlier in this chapter.
- **Dashboard Management** — Enables you to adjust the position and size of dashboard elements. See *Using the DeepSee Dashboard Designer*.
- **Go To** — Displays a list of shortcuts, which might give access to other dashboards. These are highly configurable; consult your implementers.
- **Refresh** — Reloads data into this dashboard, accessing any recent changes.
- **Logout** — Logs you out.

## 2.6 Other Options

In a dashboard, you may also be able to do the following, depending on how the dashboard is configured:

- Click an element and launch a post action. A post action can do any of the following:
  - Display a dashboard, possibly in a new window.
  - Display a Web page in another browser window.
  - Display a small child window that displays the value of a KPI.
  - Execute a custom script. Consult your implementers.
- Type or select values to control the details of a pivot table, such as how many items are shown. For example:

**Number of Top Allergies:**

**Column Number to Sort Allergies:**

Top Allerg		
Level 0 of 0		
<i>Allergies</i>	Patient Count	Average Age
soy	448	37.50
ant bites	447	36.30
peanuts	441	35.95
dairy products	441	35.81
bee stings	439	34.61
eggs	435	34.88
wheat	426	35.29

- Click buttons to start and stop timers that refresh the data. For example:

Start Timer

**Sample  
Timer**  
Next Trigger In  
0:06

Not all timers have start/stop buttons like this. Also, a timer can be hidden. That is, your dashboard might refresh automatically without any visible timer.

# 3

## Using Pivot Tables

Pivot tables are complex and provide a rich set of analytical options, so you have many options even when using a simple dashboard that displays one pivot table. This chapter discusses the common options for pivot tables. It discusses the following topics:

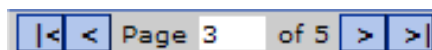
- [Basic options in a pivot table](#)
- [How to pivot a pivot table](#)
- [How to display a pivot table as a chart](#)
- [How to drill through or drill down to see more detail](#)
- [How to drill through by double-clicking](#)
- [How to drill down via right-click, for an even more detailed look at the data](#)
- [How to view a detail listing that shows the source data for a given cell](#)
- [How to hide and show columns and rows](#)
- [How to export data](#)
- [Basic information on all the right-click options in a pivot table](#)

Also see the chapter “[Using Charts.](#)”

### 3.1 Basic Options in a Pivot Table


When viewing a pivot table, you have the following basic options:

- If the pivot table spans multiple pages, you can navigate through the pages. To do so, click the arrow buttons in the footer.




Or type a page number into **Page** and then click elsewhere.

- You can click column headers to resort the pivot table.
- You can resize columns by dragging the divider between them. Then to save the new column widths, right-click and select **Save Column Width**.

- You can display basic information about this pivot table. To do so, click the information button () and choose an option.

## 3.2 Pivoting the Pivot Table

You can switch the columns and the rows. To do so, click the more button () and then click **Pivoting**.


For example, suppose that you start with the following pivot table:


Table 1			
	0-29	30-59	60+
<i>Diagnoses</i>	Patient Count	Patient Count	Patient Count
CHD	1	95	229
None	3,896	3,542	959
asthma	319	285	105
diabetes	32	253	227
osteoporosis			228

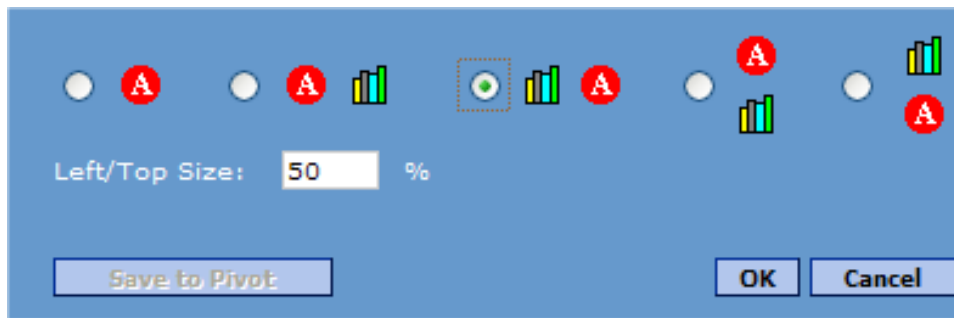
If you pivot this table, you see the following:

Table 1						
<i>Age Group</i>		CHD	None	asthma	diabetes	osteoporosis
0-29	Patient Count	1	3,896	319	32	
30-59	Patient Count	95	3,542	285	253	
60+	Patient Count	229	959	105	227	228

## 3.3 Displaying the Pivot Table as a Chart

You can redisplay the pivot table as a chart. To do so, click the display as chart button ()

You can also display the pivot table as a grid and as a chart next to each other. To do so, click the more button () and then click **Grid Chart Display**. The system displays a dialog box on which you can choose how to lay out the two elements, as well as specify their relative proportions, as follows:




For information on using charts, see the chapter “Using Charts.”

**Tip:** If the pivot table is currently displayed as a chart, you can redisplay it as a grid by clicking the display as grid button



## 3.4 Drilling Through and Drilling Down

When you view a pivot table, you can also choose an area and *drill through* or *drill down* (these are different) to see different breakdowns. To drill through or to drill down, do the following:

- If the drill options are not displayed, do one of the following:
  - Right-click in the table and select **Show Measure List**. (The name is misleading; the list shows the drill options, not measures.)
  - Click the drill list button () in the header of the pivot table.

The pivot table is then redisplayed with the drill options list on the left. For example:

	0-29	30-59	60+
<i>Diagnoses</i>	<i>Patient Count</i>	<i>Patient Count</i>	<i>Patient Count</i>
CHD	1	95	229
None	3,896	3,542	959
asthma	319	285	105
diabetes	32	253	227
osteoporosis			228

- Optionally expand the folders in the drill options list.
- Drag and drop any item in the drill options list to a data cell in any row.
  - If you drag and drop an item from the **Drill Down** folder, you are *drilling down*.

- If you drag and drop an item from elsewhere in the drill options list, you are *drilling through*.

In either case, the pivot table is redisplayed to show a breakdown for the row you chose. The following sections give examples.

You can drill repeatedly for closer and closer examination.

### 3.4.1 Drill-through Example

Suppose that we start with the following pivot table.

	0-29	30-59	60+
<i>Diagnoses</i>	<i>Patient Count</i>	<i>Patient Count</i>	<i>Patient Count</i>
CHD	1	95	229
None	3,896	3,542	959
asthma	319	285	105
diabetes	32	253	227
osteoporosis			228

If we drag Home City from the drill options list and drop it in any cell in the asthma row, we then see the following:

	0-29	30-59	60+
<i>Home City</i>	<i>Patient Count</i>	<i>Patient Count</i>	<i>Patient Count</i>
Cedar Falls	38	40	12
Centerville	38	35	3
Cypress	33	25	16
Elm Heights	36	35	15
Juniper	30	31	16
Magnolia	31	30	11
Pine	38	32	8
Redwood	33	28	15
Spruce	42	29	9

Now we are viewing a close-up for asthma, with a breakout by city.

Next, if we drag Gender from the drill options list to any cell in the Juniper row, the system displays the following:

Patient Count by Diagnoses and Age Group - Diagnoses= asthma ▶ Home City = Juniper ▶ Gender < Level 2 of 2

	0-29	30-59	60+
<i>Gender</i>	Patient Count	Patient Count	Patient Count
Female	17	18	9
Male	13	13	7

This pivot table now shows a close-up for Juniper, showing separate data for each gender. By displaying Level 2 of 2, the header indicates that we are now in the second level of drilling.

### 3.4.2 Drill-down Example

In this example, we start with the same pivot table that we used in the previous example. First, we expand the Drill Down folder in the drill options list:

	0-29	30-59	60+
<i>Diagnoses</i>	Patient Count	Patient Count	Patient Count
CHD	1	95	229
None	3,896	3,542	959
asthma	319	285	105
diabetes	32	253	227
osteoporosis			228

In this case, one drill-down is available, Gender & Pat Grp. If we drag that and drop it within the CHD row of the pivot table, we then see the following:

Patient Count by Diagnoses and Age Group - Diagnoses= CHD ▶ Gender & Pat Grp

		0-29	30-59	60+
Gender	Patient Group	Patient Count	Patient Count	Patient Count
Female	Group A		12	37
	Group B		16	42
	None		4	21
Male	Group A		22	53
	Group B	1	23	51
	None		18	25

Field List:

- Age Bucket
- Age Group
- Age Year
- Allergies
- Allergy Severities
- Birth Date
- Diagnoses
- Doctor
- Doctor Group
- Favorite Color
- Gender
- Home City
- Home ZIP
- Patient Group
- Age
- Allergy Count
- Test Score
- Drill Down

In comparison to drilling through, we see a breakdown by multiple dimensions — in this case, gender and patient group. Notice that the name of the drill-down indicates the dimensions it uses. Your system may or may not follow this convention.

## 3.5 Drilling Through by Double-clicking

Depending on how your system was configured, you might be able to drill through by double-clicking. For example, you might be able to drill from Home ZIP to Home City by double-clicking in the pivot table. This type of drill through is configured separately for each dimension; that is, the available behavior is potentially different for each dimension.

When you double-click anywhere within a row in a pivot table, there are three possible cases:

- If one drill dimension is available, the pivot table immediately drills to it, exactly as if you had dragged and dropped that dimension as described in [the previous section](#).
- If more than one drill dimension is available, the system displays a dialog box that lists those dimensions. When you then double-click a dimension, the pivot table drills to it.
- If no drill dimension is available, nothing happens.

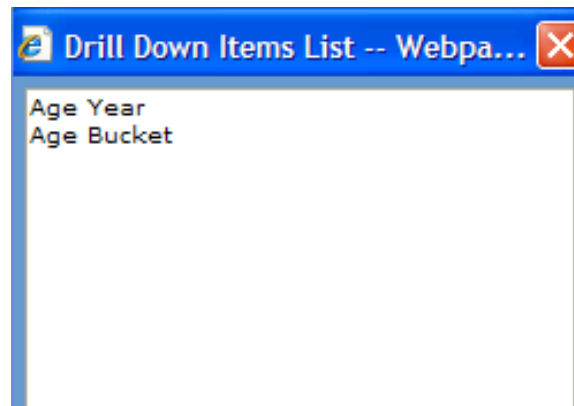
For example, suppose that you are viewing the following pivot table:

	0-29		30-59		60+	
<i>Home ZIP</i>	Patient Count	Average Test Score	Patient Count	Average Test Score	Patient Count	Average Test Score
32006	925	74.57	933	75.45	360	74.67
32007	476	74.03	403	73.73	157	72.84
34577	1,428	74.29	1,415	74.25	542	74.89
36711	489	73.40	455	73.80	191	75.21
38928	930	74.87	938	75.55	358	74.96

If you double-click the 34577 row, you might then immediately see the following:

HomeZIP = 34577 ▶ Home City						
	0-29		30-59		60+	
<i>Home City</i>	Patient Count	Average Test Score	Patient Count	Average Test Score	Patient Count	Average Test Score
Cypress	483	74.60	459	75.01	188	75.62
Magnolia	466	73.83	498	74.44	165	75.06
Pine	479	74.44	458	73.35	189	73.96

Or you might see a dialog box that lists multiple dimensions, as follows:



If you then double-click one of these dimensions, the pivot table drills through to that dimension.

## 3.6 Drilling Down by Right-clicking

You might also be able to drill down to an *associated pivot table*. In contrast to the previous types of drilling, you usually see measures that were not included in the original pivot table.

To drill down by right-clicking, do the following:

1. Right-click a data cell in the pivot table and then click **Drill to pivot\_table\_name (By Row)**; the name of the pivot table depends upon your implementation. Also, you might have multiple such options.

The system then displays another pivot table, in a new window.

### 3.6.1 Right-click Drill-down Example

In this demo, we start with the same pivot table used earlier:

Patient Count by Diagnoses and Age Group				
	0-29	30-59	60+	
<i>Diagnoses</i>	Patient Count	Patient Count	Patient Count	
CHD	1	95	229	
None	3,896	3,542	959	
asthma	319	285	105	
diabetes	32	253	227	
osteoporosis			228	

If we right-click osteoporosis and then click Drill Down to Favorite Colors (By Row), the system then displays the following in another window in front of the original pivot table:

Favorite Colors	
<i>Favorite Color</i>	Patient Count
Blue	36
Green	25
No Data Available	51
Orange	31
Purple	25
Red	31
Yellow	29

From the original pivot table, we know that 228 patients have the osteoporosis diagnosis. This pivot table shows us the favorite colors of those patients.

## 3.7 Viewing Detail Listings

Earlier in this book, you saw that dashboards can include *detail listings*, which display the source data. You can also display detail listings from within pivot tables. To do so:

1. Right-click a data cell.
2. Then do one of the following:
  - To display the default detail listing, click **Listing to Screen**.
  - To display a different detail listing, click **Temp. Listing Selection**, click the detail listing, and then click **OK**.

This option is available only if you have access to multiple detail listings. A different detail listing displays the same records but shows different fields for those records.

The system then displays another window, which might look like the following:

Basic Details <span style="float: right;">i</span>				
Patient ID	Age	Gender	Diagnoses	Test Score
SUBJ_100301	39	Male		69
SUBJ_100302	48	Female		58
SUBJ_100303	17	Male		63
SUBJ_100304		Male		85
SUBJ_100305	86	Female	diabetes osteoporosis	99
SUBJ_100306	81	Male	CHD	87
SUBJ_100307	28	Female		63
SUBJ_100308	50	Female	diabetes	60
SUBJ_100309	11	Male		91
SUBJ_100310	13	Female	asthma	72
SUBJ_100311	60	Male		51
SUBJ_100312	19	Male		97
SUBJ_100313	28	Male		75
SUBJ_100314	6	Female	asthma	95
SUBJ_100315	26	Male		85
SUBJ_100316	35	Male		52
SUBJ_100317	8	Male		81
SUBJ_100318	24	Male		94
SUBJ_100319	29	Female		95
SUBJ_100320	75	Male		53
SUBJ_100321	32	Female		

Page 1 of 200    Record 1

This detail listing shows you the lowest-level data for the given cell. That is, the detail listing you see depends on *where* in the row you started.

For information on using detail listings, see the chapter “[Using Detail Listings](#).”

## 3.8 Hiding and Showing Columns and Rows

You can control which columns and rows are displayed. To do so:

- To hide a row, right-click in the row and then click **Hide Row**.

- To display all hidden rows, right-click anywhere in the pivot table and then click **Show Row**.
- To hide a column, right-click in the column and then click **Hide Column**.
- To display all hidden columns, right-click anywhere in the pivot table and then click **Show Column**.

## 3.9 Exporting Data from a Pivot Table

You can export data from a pivot table in any of the following ways:

- To export to Microsoft Excel, right-click in the data area and then click **Export to MS Excel**.
- To export to Microsoft Word, right-click in the data area and then click **Export to MS Word**.
- To export to an ordinary text file, right-click in the data area and then click **Export to text file**.
- To export to a Microsoft Excel chart, right-click in the data area and then click **Export as chart to MS Excel**.

The files are exported to the working directory. The default working directory is *install-dir\CSP\sys\bi\work\namespace*, where *install-dir* is the directory where Caché was installed, and *namespace* is the Caché namespace that you are using. Consult your implementers for specific details.

## 3.10 Using Right-Click Options in a Pivot Table

In a pivot table, if you right-click, the system displays the following options, some of which have been discussed earlier in this chapter.

**Note:** You may or may not have permission to use all these options.

- **Data Alert** — Enables you to define data alerts for this pivot table. See [Using the DeepSee Analyzer](#).
- **Layout Preference** — Enables you to define and apply grid themes, which specify the color and font to use in different areas of the grid. See [Using the DeepSee Analyzer](#).
- **Setup** — Allows you to specify basic options for the pivot table. See [Using the DeepSee Analyzer](#).
- **Send Message** — Enables you to send email about this pivot table. For this option to work, your DeepSee email options must be configured.
- **View Pivot in Analyzer** — Opens the DeepSee Analyzer and displays this pivot table. For information, see [Using the DeepSee Analyzer](#).
- **Save Column Width** — Saves the widths of all columns.
- **Listing to Screen** and **Temp. Listing Selection** — See “[Viewing Detail Listings](#),” earlier in this chapter.
- **Show Column in Chart** — Shows the data for the given column in chart form.
- **Drill To (by row)** — Enables you to drill to another pivot table; see “[Drilling Down by Right-clicking](#),” earlier in this chapter.
- **Hide/Show Measure List** — Toggles the display of the drill options list. (The name is misleading; the list shows the drill options, not measures.) See “[Drilling Through and Drilling Down](#),” earlier in this chapter.
- **Print Preview** — Displays the pivot table in a secondary browser window so that you can print the pivot table alone (rather than the entire dashboard).

- **Export to MS Excel, Export to MS Word, Export to text file, Export as chart to MS Excel** — See “[Exporting Data from a Pivot Table](#),” earlier in this chapter.
- **Cell Info** — Displays a dialog box with detailed information about the current cell.
- **Copy Cell Data** — Copies the data of this cell to the system clipboard.
- **Statistics** — Displays options to see different kinds of statistics for the pivot table.
- **Hide Column, Hide Row, Show Column, and Show Row** — See “[Hiding and Showing Columns and Rows](#),” earlier in this chapter.
- **Close** — Closes this pivot table, as seen on the dashboard; a blank space is displayed instead. To redisplay the pivot table, refresh the browser.



# 4

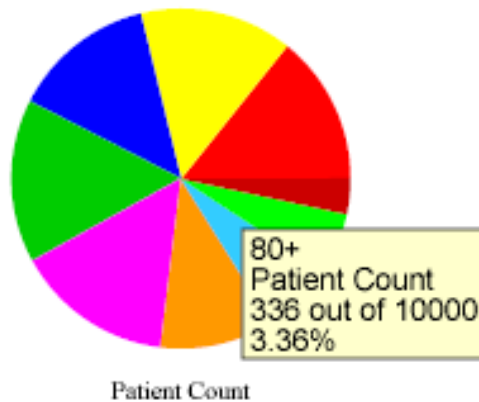
## Using Charts

This chapter describes how to use pivot tables when they are displayed in chart format. It discusses the following topics:

- [How to display details in hover text](#)
- [How to change the chart type](#)
- [How to change the chart properties](#)
- [How to use other right-click options in a chart](#)
- [How to use right-click options in a chart legend](#)

### 4.1 Displaying Hover Text in a Chart

In a chart, if you hover the pointer in a chart, the system displays information about the item on which you are hovering. For example:



### 4.2 Specifying the Chart Type

To change the chart type, right-click in the chart, click **Chart**, and then click a chart type. The chart is immediately redisplayed using the new type.

For reference, the following table shows examples of the chart types:

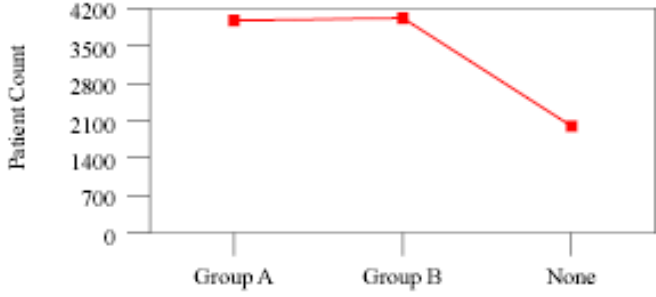
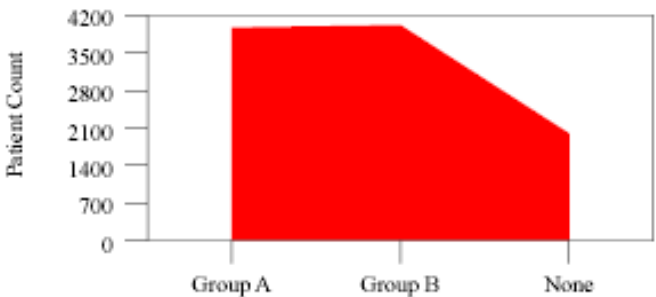
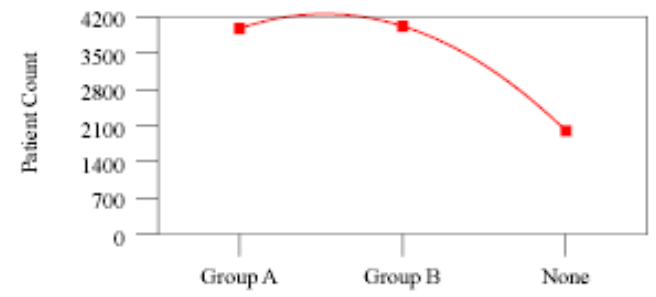
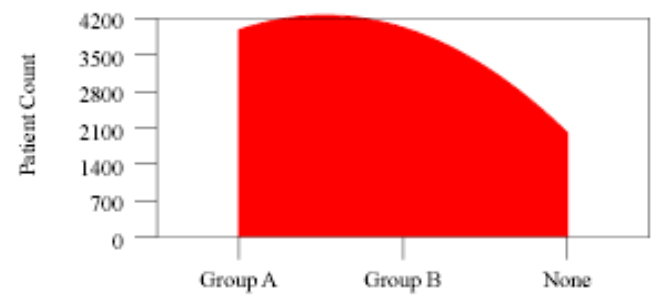
Chart Type	Example								
Line	 <p>A line chart with 'Patient Count' on the y-axis (0 to 4200) and three categories on the x-axis: 'Group A', 'Group B', and 'None'. A red line connects three data points: Group A at ~4000, Group B at ~4000, and None at 2100.</p> <table border="1"> <thead> <tr> <th>Group</th> <th>Patient Count</th> </tr> </thead> <tbody> <tr> <td>Group A</td> <td>4000</td> </tr> <tr> <td>Group B</td> <td>4000</td> </tr> <tr> <td>None</td> <td>2100</td> </tr> </tbody> </table>	Group	Patient Count	Group A	4000	Group B	4000	None	2100
Group	Patient Count								
Group A	4000								
Group B	4000								
None	2100								
Area	 <p>An area chart with the same axes and data points as the line chart. The area under the red line is filled with red color.</p>								
Curve	 <p>A curve chart with the same axes and data points. A smooth red curve is drawn through the three data points.</p>								
Area curve	 <p>An area curve chart with the same axes and data points. The area under the smooth red curve is filled with red color.</p>								

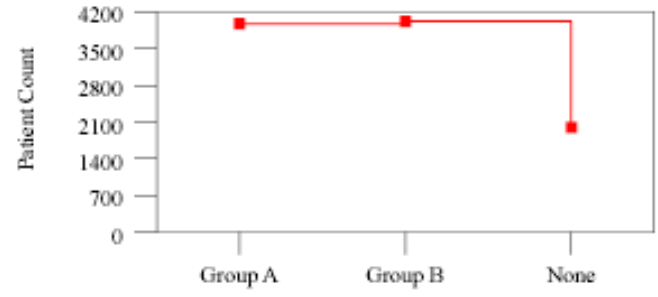
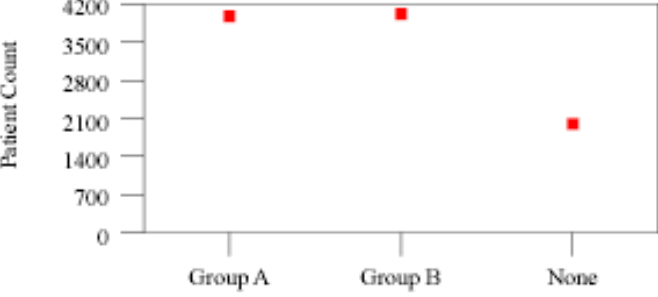
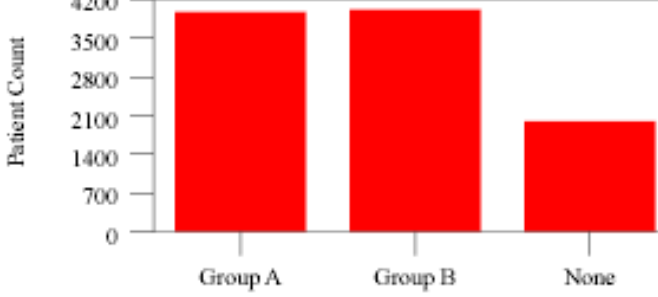
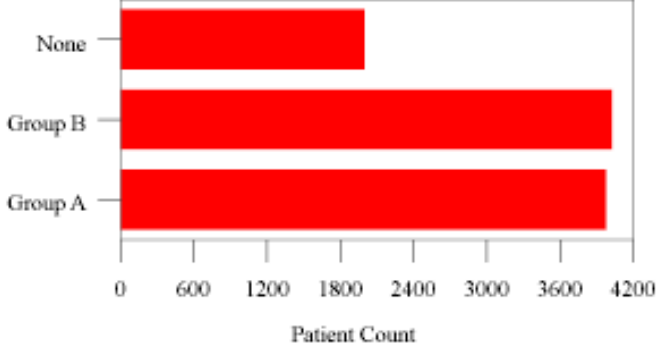
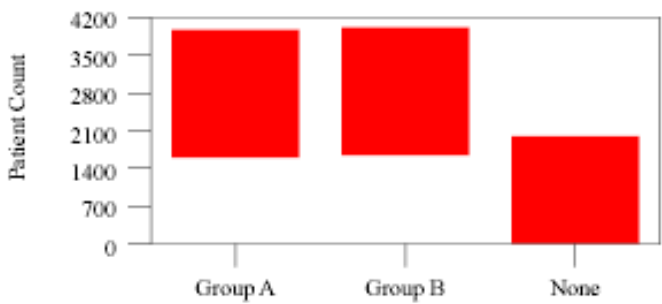

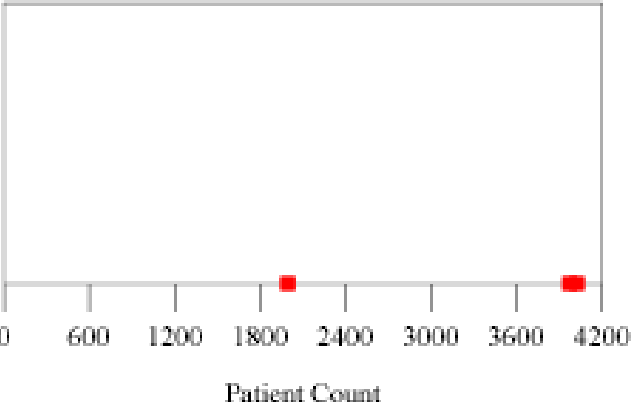
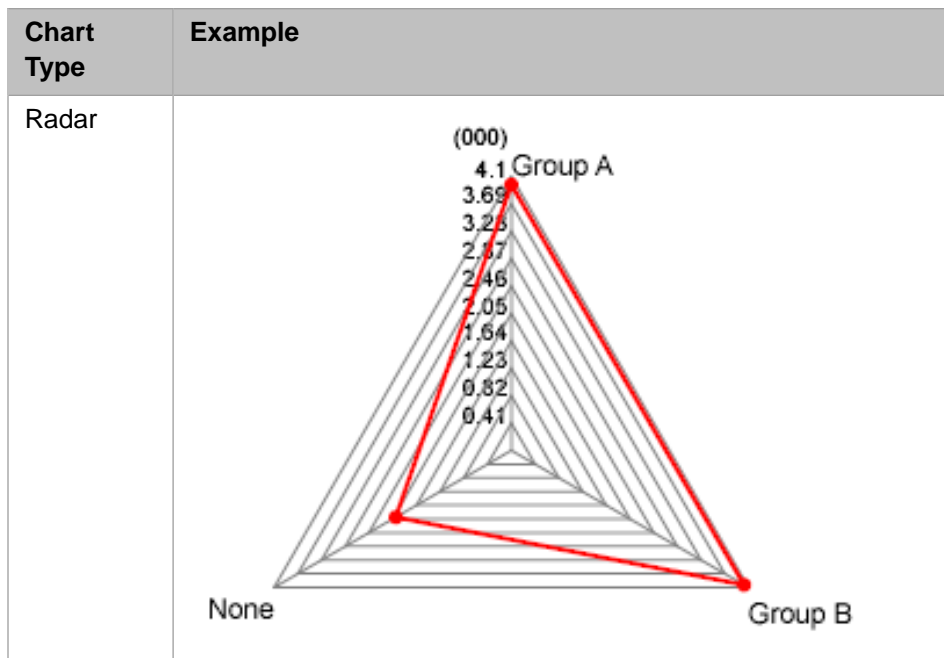
Chart Type	Example								
Step	 <p>A step chart with 'Patient Count' on the y-axis (0 to 4200) and categories 'Group A', 'Group B', and 'None' on the x-axis. Red square markers are connected by a red line. Group A and Group B are at approximately 4000, and 'None' is at 2100.</p> <table border="1"> <thead> <tr> <th>Group</th> <th>Patient Count</th> </tr> </thead> <tbody> <tr> <td>Group A</td> <td>4000</td> </tr> <tr> <td>Group B</td> <td>4000</td> </tr> <tr> <td>None</td> <td>2100</td> </tr> </tbody> </table>	Group	Patient Count	Group A	4000	Group B	4000	None	2100
Group	Patient Count								
Group A	4000								
Group B	4000								
None	2100								
Scatter	 <p>A scatter plot with 'Patient Count' on the y-axis (0 to 4200) and categories 'Group A', 'Group B', and 'None' on the x-axis. Red square markers are plotted. Group A and Group B are at approximately 4000, and 'None' is at 2100.</p> <table border="1"> <thead> <tr> <th>Group</th> <th>Patient Count</th> </tr> </thead> <tbody> <tr> <td>Group A</td> <td>4000</td> </tr> <tr> <td>Group B</td> <td>4000</td> </tr> <tr> <td>None</td> <td>2100</td> </tr> </tbody> </table>	Group	Patient Count	Group A	4000	Group B	4000	None	2100
Group	Patient Count								
Group A	4000								
Group B	4000								
None	2100								
Bar	 <p>A vertical bar chart with 'Patient Count' on the y-axis (0 to 4200) and categories 'Group A', 'Group B', and 'None' on the x-axis. Red bars represent the patient counts. Group A and Group B are at approximately 4000, and 'None' is at 2100.</p> <table border="1"> <thead> <tr> <th>Group</th> <th>Patient Count</th> </tr> </thead> <tbody> <tr> <td>Group A</td> <td>4000</td> </tr> <tr> <td>Group B</td> <td>4000</td> </tr> <tr> <td>None</td> <td>2100</td> </tr> </tbody> </table>	Group	Patient Count	Group A	4000	Group B	4000	None	2100
Group	Patient Count								
Group A	4000								
Group B	4000								
None	2100								
Gantt	 <p>A horizontal bar chart with 'Patient Count' on the x-axis (0 to 4200) and categories 'None', 'Group B', and 'Group A' on the y-axis. Red bars represent the patient counts. 'None' is at 2100, 'Group B' is at 4000, and 'Group A' is at 4000.</p> <table border="1"> <thead> <tr> <th>Group</th> <th>Patient Count</th> </tr> </thead> <tbody> <tr> <td>None</td> <td>2100</td> </tr> <tr> <td>Group B</td> <td>4000</td> </tr> <tr> <td>Group A</td> <td>4000</td> </tr> </tbody> </table>	Group	Patient Count	None	2100	Group B	4000	Group A	4000
Group	Patient Count								
None	2100								
Group B	4000								
Group A	4000								

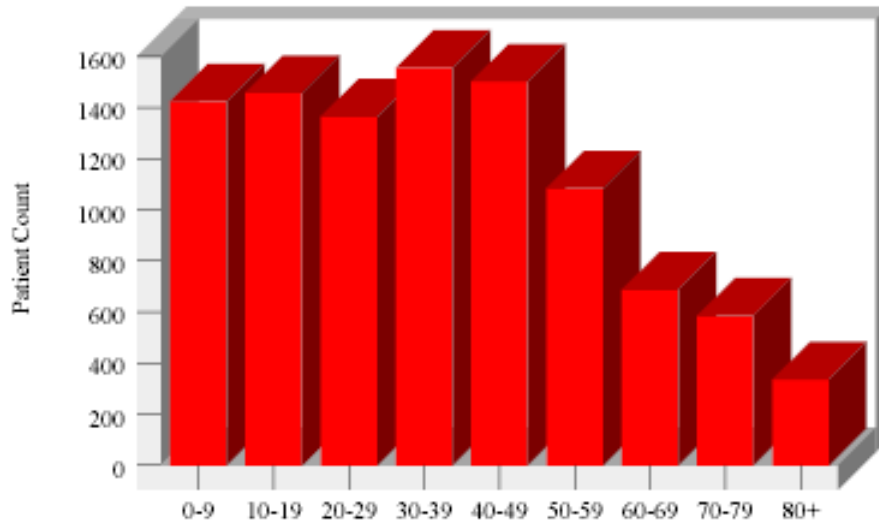
Chart Type	Example
Cube	 <p>A 3D bar chart with three bars representing 'Group A', 'Group B', and 'None'. The vertical axis is labeled 'Patient Count' and has tick marks at 0, 700, 1400, 2100, 2800, 3500, and 4200. The 'Group A' and 'Group B' bars are approximately 3800 units high, while the 'None' bar is approximately 2100 units high. All bars are colored red.</p>
Pie	 <p>A pie chart divided into three segments: a red segment (top), a yellow segment (left), and a blue segment (right). The red segment is the largest, followed by yellow, and then blue. The chart is labeled 'Patient Count' below it.</p>
Doughnut	 <p>A doughnut chart with three segments: red, yellow, and blue, representing the same distribution as the pie chart above. The chart is labeled 'Patient Count' below it.</p>
Coordinate	 <p>A coordinate chart with a horizontal axis labeled 'Patient Count' ranging from 0 to 4200 in increments of 600. Two red square data points are plotted on the axis at approximately 2100 and 3800.</p>



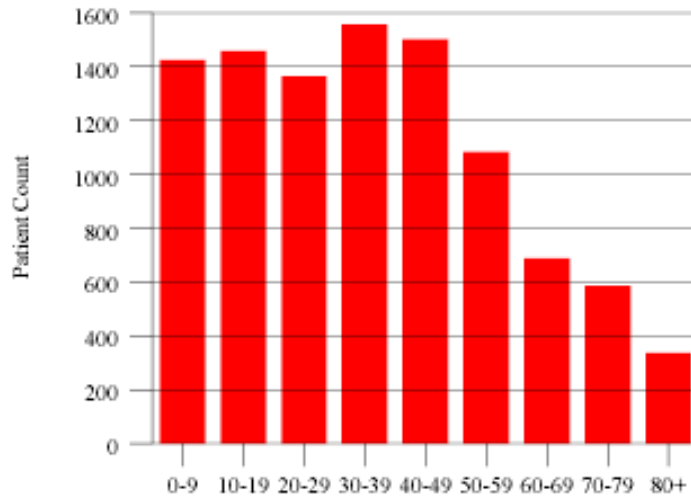
## 4.3 Specifying Chart Properties

To specify chart properties, right-click in the chart and then click **Chart Properties**. The following options are the mostly commonly used ones:

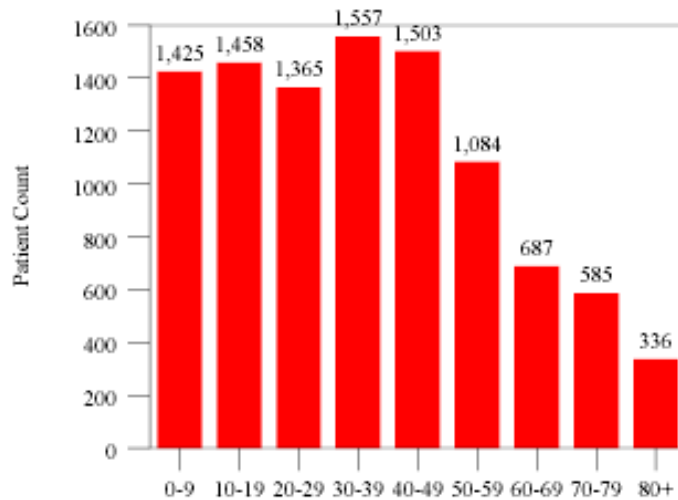
- **Default Chart Type** — Specifies the chart type. To use this, click the browse button (...) and select a type. See the previous section.
- **Height and Width** — These options specify the height and width of the chart.
- **Chart Margin** — Specifies the margin on the top, left, bottom, and right.
- **Color Scheme** — Specifies the chart theme to use. For information, see [Using the DeepSee Analyzer](#).
- **Chart-Legend Ratio** — Specifies the relative sizes of the chart and the legend.
- **Legend Position** — Specifies the position of the legend.
- **Legend Display** — Specifies how to autosize the legend.
- **Label Rotation** — Specifies how much to rotate the labels (in degrees), from the normal horizontal position. The default is 0.
- **Label Max Char** — Specifies the maximum number of characters to display in the labels.
- **Show Column No** — Specifies which data columns of the pivot table to show in the chart. Specify 1 for the first data column, 2 for the second, and so on. By default, all data columns are shown.
- **3D Appearance** — Displays the chart with three-dimensional appearance. For example:



- **Show Gridline** — Adds grid lines as follows:



- **Show Value** — Displays each value on the chart, as follows:



The other options are advanced and are not documented.

## 4.4 Using Right-click Options in a Chart

If you right-click in a chart, the system displays the following options:

- **Chart** — Displays a submenu of chart types, as documented [earlier in this chapter](#).
- **Chart Properties** — Displays dialog box where you can specify many chart properties. See the [previous section](#).
- **Chart Reference** — Displays a dialog box where you can add reference lines to the chart. By default, the reference lines are horizontal.
- **Refresh** — Refreshes the display with any new data.
- **Show Legend** — Displays the chart legend (which has its own set of right-click options).
- **Switch to Grid** — Displays the pivot table as a grid instead of as a chart.
- **Drill Down** — Displays a list of drill dimensions. If you click one, the chart is redisplayed to drill to that dimension.
- **Listing to Screen** — Displays a list of possible detail listings. If you click one, the selected detail listing is displayed in another window.

For information on using detail listings, see the chapter [“Using Detail Listings.”](#)

Ignore the other right-click options.

## 4.5 Using Right-click Options in a Chart Legend

If you right-click in a chart legend, the system displays the following options:

- **Autosize** — Resizes the chart legend and the chart — horizontally, vertically, or both.
- **Normal** — Switches off any autosizing.
- **Hide** — Hides the chart legend.

- **Position** — Displays a submenu of possible locations for the legend (**Top**, **Left**, **Right**, and **Bottom**). If you click one, the chart is redisplayed with the chart legend in the specified location.

Ignore the other options.

# 5

## Using Detail Listings

This chapter describes how to use detail listings. It discusses the following topics:


- [An introduction to detail listings](#)
- [Basic options you have within a detail listing](#)
- [How to export data from a detail listing](#)

### 5.1 Introduction to Detail Listings

The purpose of a detail listing is to show selected parts of the lowest-level data in your system. Detail listings are available in three places:

- You can view detail listings from within pivot tables, as described earlier in “[Viewing Detail Listings.](#)”
- You can view detail listings from within speedometers, as described in “[Speedometers.](#)”
- Detail listings can also be displayed directly within dashboards, as shown in “[Introduction to Dashboards.](#)”

In any case, a detail listing is displayed with alternating grey and white rows. It looks like this:

Basic Details 				
Patient ID	Age	Gender	Diagnoses	Test Score
SUBJ_100301	39	Male		69
SUBJ_100302	48	Female		58
SUBJ_100303	17	Male		63
SUBJ_100304		Male		85
SUBJ_100305	86	Female	diabetes osteoporosis	99
SUBJ_100306	81	Male	CHD	87
SUBJ_100307	28	Female		63
SUBJ_100308	50	Female	diabetes	60
SUBJ_100309	11	Male		91
SUBJ_100310	13	Female	asthma	72
SUBJ_100311	60	Male		51
SUBJ_100312	19	Male		97
SUBJ_100313	28	Male		75
SUBJ_100314	6	Female	asthma	95
SUBJ_100315	26	Male		85
SUBJ_100316	35	Male		52
SUBJ_100317	8	Male		81
SUBJ_100318	24	Male		94
SUBJ_100319	29	Female		95
SUBJ_100320	75	Male		53
SUBJ_100321	32	Female		


Page 1 of 200    Record 1

Each row in this table represents selected parts of the lowest-level data in your system.

The area at the bottom of the window shows which page you are viewing (page 1 of 1 in this example) and which record is displayed at the top of the page (record 1 in this example).

## 5.2 Basic Options in a Detail Listing

The header and footer of a detail listing provide options that enable you to do the following:

- To move to other pages, click the arrow buttons in the **Page** area.
- To display a specific page, type the page number into **Page** and then click elsewhere.
- To move to other records, click the arrow buttons in the **Record** area.
- To display a specific record at the top of the window, type the record number into **Record** and then click elsewhere.
- To display information about the detail listing and about the cell whose data you are viewing, click the information button () and then click **Open Listing Information**. The system then displays a screen like the following:

ID :	<input type="text" value="10001"/>		
Name :	<input type="text" value="Basic Details"/>		
Subject Area Class :	<input type="text" value="DeepSee.Study.Patient"/>		
Current Query (filter) :	<input type="text" value="[Age Bucket = 30-39]"/>		
Query Variable :	<input type="text"/>		
Total Records :	<input type="text" value="1557"/>	Current record number :	<input type="text" value="1"/>
# Records per page :	<input type="text" value="50"/>	Listing display type :	<input type="text" value="List all by page"/>
			<input type="button" value="OK"/>

## 5.3 Exporting Data from a Detail Listing

In a detail listing, if you right-click, you can access the following options:

- **Export to MS Excel — by Page** — Exports the page of data to Microsoft Excel.
- **Export to MS Excel — All** — Exports the entire detail listing to Microsoft Excel.
- **Export to HTML — All** — Exports the page of data to an HTML file.
- **Export to text file** — Exports the entire detail listing to an ordinary text file.
- **Export to MS Words — by Page** — Exports the data to Microsoft Word.
- **Export to MS Words — All** — Exports the data to Microsoft Word.

In all cases, the exported file is written to the working directory. The default working directory is *install-dir*\CSP\sys\bi\work\namespace, where *install-dir* is the directory where Caché was installed, and *namespace* is the Caché namespace that you are using. Consult your implementers for specific details.



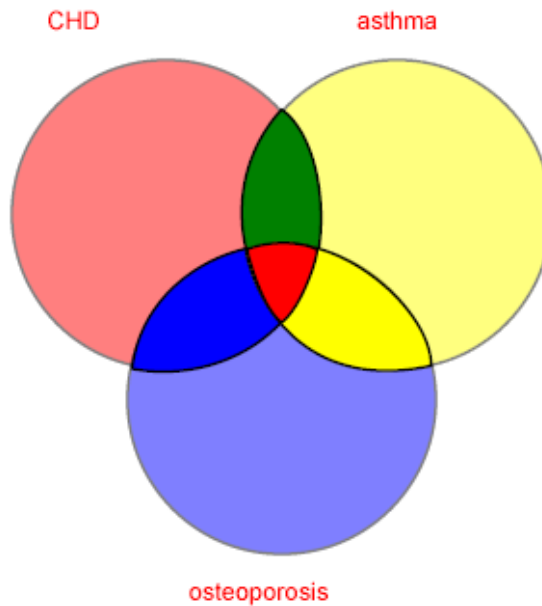
# 6

## Working with Venn Diagrams

In rare cases, your dashboards might also include Venn diagrams. This chapter shows some examples and describes the available options.

### 6.1 Venn Diagram Formats

In DeepSee, a Venn diagram can be presented in two formats — either as a diagram or as a table. The following example shows a diagram:



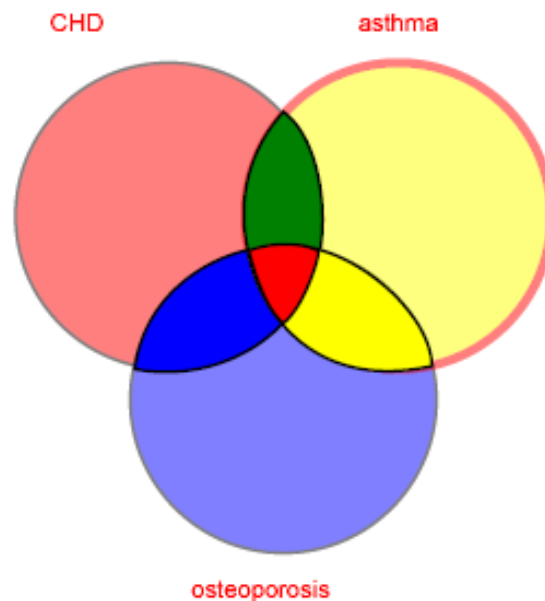
In contrast, the following example shows the same data as a table:

Sample	
CHD	335
asthma	677
[CHD] AND [asthma]	17
osteoporosis	214
[CHD] AND [osteoporosis]	31
[asthma] AND [osteoporosis]	19
[CHD] AND [asthma] AND [osteoporosis]	2

## 6.2 Options in a Venn Diagram

To work with this Venn diagram, you have the following options:

- Hover the pointer over any segment. DeepSee highlights that segment. For example:



- Right-click on any segment of the diagram and then click **Listing to Screen (whole group)**. DeepSee then displays a detail listing that shows the records that make up the selected group. This refers to the area that is outlined with a bold red line.
- Right-click on any segment of the diagram and then click **Listing to Screen (selected section only)**. DeepSee then displays a detail listing that shows the records that make up the section that your pointer is on. This may be the same as the selected group.
- Right-click and then click **Switch Table/Venn**.