Sparkroom Affiliate Online Help

Welcome to Sparkroom Online Help

Sparkroom is a software solution for enrollment marketing automation, which allows lead buyers to manage, measure, and optimize student inquiries from a single SAAS (software-as-a-service) platform, as well as allows lead providers to view form post instructions and analyze how their inquiries are performing by running reports, creating dashboard and pivot views, and view inquiry details. With tools for automated inquiry capture and delivery, scrubbing, scoring, lead provider management, media planning and email nurturing, Sparkroom's platform allows schools to manage inquiries from a single web GUI.

This Online Help is intended for the following audience group:

- Lead Provider/Affiliate

This Online Help system describes how to use the Sparkroom application as a Lead Provider or Affiliate and includes Overviews and Process Steps for each section of the Sparkroom GUI visible to the vendor, such as the *Lead Inquiry* screen, Delivery Monitor, canned reports, dashboards, pivot analysis tool, the *View Management* screen, and the *Form Post Instructions* screen. Further, a *Glossary of Terms* describes common terms and concepts used in this documentation.

By logging into the Sparkroom platform, lead providers can view information about leads and lead performance across the Sparkroom customers to which they provide inquiries, reducing the manual interaction required between buyers and sellers of leads. Specifically, the Sparkroom portal provides the following benefits:

- Enables vendors to reconcile good leads and bad leads received by the platform in near real time
- Eliminates the need for schools to email manual exports of bad lead return files, since vendors can access and download this bad lead information and corresponding reason codes themselves
- Reduces invoice reconciliation challenges, as vendors can access up-to-date information about lead costs and leads received
- Provides an easy way for schools to share conversion and lead score information with vendors if they wish to do so

To use this Online Help, drill down from the left-hand Table of Contents or use the Index or Search features to locate the information you need. While the Previous Topic and Next Topic links available at the top of each page will help you navigate the online help topics in sequence, you can use your browser's Back link (e.g., right-click on your screen and select Back from the short cut menu) to return to the previous page in your navigation sequence.

Glossary of Terms

Glossary Term	Definition
Accreditation	The process in which certification of competency is presented to an organization. Oftentimes, a school will be accredited to provide certain types of degrees, either by a federal or regional body. Department of Education regulations require a school to make their accreditation information available whenever the school is promoted online.
Adjusted Monthly Target	A monthly cap which has been modified for a lead buyer's target group from the *Allocations* screen.
Advertising Key	An additional lead identifier that is sometimes used to tag inquiries for specific campaigns.
Affiliate	See **Lead Provider**.
Alias	An additional lead provider identifier which the lead buyer can define when setting up the lead provider.
Allocation	See **Target**.
Analytics	The reporting and data analysis feature of the Sparkroom application, which allows the user to analyze inquiry-related data received and stored by the system. The types of analytics available include canned reports, dashboard views, and pivot views (in ascending order of analytical complexity).
Applicant	The individual submitting the inquiry (i.e., the person interested in the school).
Application	The Sparkroom software application for enrollment marketing automation described in this Online Help, which allows users to manage and measure inquiries from a single platform.
Bad Inquiry	An inquiry which has been received by the Sparkroom application but is rejected to the lead provider because of bad inquiry data, such as missing required fields or incorrect data. Typically, the lead buyer does not pay for bad inquiries nor do they count towards target group caps. See also **Verification Code**.
Billable Inquiry/Lead	Sparkroom assigns a Y or N billable status to each inquiry based on whether it is a "good" or "bad" inquiry (generally, good inquiries are considered billable to the lead buyer).
Buyer Restrictions	A restriction that a lead buyer places on a lead provider's channel which blocks the vendor from submitting inquiries to specific schools/campuses/programs.
Campaign	An organized inquiry selling event by the lead provider. Filters are often created by the lead buyer to capture inquiries from a particular campaign. Inquiries received by the Sparkroom application can be searched for by campaign identifier, which also presents in analytics.
Campus	A school location (i.e., online or ground) which offers a particular set of programs. A campus is part of a lead buyer's division > school > campus > program hierarchy.
Campus Type	The type of campus, which is usually online (i.e., a web-based campus) or ground (i.e., a bricks and mortar campus).
Canned Report	The reports available from the Operations menu of the Sparkroom application.
Cap	See **Target**.
Category/Subject	A pre-defined taxonomy used in the Sparkroom application which assigns a set of subjects to a school's program.
Channel	A product offering from a lead provider; a specific source of inquiries from the lead provider which may be tied to a campaign. The lead buyer can select which lead provider channels to activate and create filters for, which then allows the school to receive inquiries from that source.
Compliance Rating	A rating of the content displayed on the inquiry submission form, determined by its level of compliance with the U.S. Department of Education guidelines. This rating is based on Sparkroom's integration with PerformMatch, a third party campaign monitoring platform.
Conditional Formatting	Colored highlighting which can be applied to a dashboard view's measure(s) based on data thresholds so that specific information can be easily identified.
Contact Method	The method by which the lead provider contacted the applicant and an inquiry was

Glossary Term	Definition
	generated; for example, contact with the applicant may have been made through digital marketing, a trade show, etc.
Content	Metadata which can be provisioned for a lead buyer's schools, campuses, and programs to provide additional details to lead providers (via the *Form Post Instructions* screen) such as long descriptions, accreditations, and disclosure information.
Conversion Data	Data generated once an inquiry has been processed in the Sparkroom application, such as downstream inquiry milestones like contact date, interview set date, enrollment date, start date, and so on. This information is updated on an ongoing basis from data received from the lead buyer's CRM system or a third party application.
Cost Per Inquiry	See **CPI**.
Cost Per Lead	See **CPI**.
CPI	Cost per inquiry; the price defined for each inquiry using pricing groups (as defined by the lead buyer). See also **Pricing Group**.
CPL	Cost per lead; see **CPI**.
CRM	Customer Relationship Management system typically used by lead buyers to manage customer information. Applicants are usually tracked in the CRM system and milestone dates, such as interview scheduled, campus visited, or program started, are logged and uploaded to the Sparkroom application on a regular basis so the data is made available for analytics.
Dashboard	See **Dashboard View**.
Dashboard View	A Sparkroom analytics tool which allows the lead provider to create tables of aggregated inquiry data for selected time periods.
Delivery Monitor	A tool which allows the lead provider to search for inquiries that have not yet been processed in the Sparkroom application.
Dimension	A category of information which can be included in a pivot view for analysis and determines how data is filtered or segmented. When creating a pivot view, the lead provider can select the dimensions they want to include in the analysis and then drill down to select only particular elements of the dimension.
Disclosure	Information which a school is legally required to disclose wherever it is represented on a web site. Disclosure information provided for a school is exposed to lead providers through the *Form Post Instructions* screen.
Division	Typically, the lead buyer purchasing inquiries from lead providers. A division is part of a lead buyer's division > school > campus > program hierarchy.
Enrollment Counselor	The lead buyer employee (usually a member of a campus admissions team) responsible for following up on an inquiry.
External Reference	The reference used to identify an element on an inquiry (such as a lead provider channel or a lead buyer campus, school, or program). Sparkroom may use an external reference as a stable identifier when communicating with a third party system.
Export	Views in the application (i.e., report, lead inquiry, dashboard, and pivot views) can be exported to FTP or email and scheduled to run overnight on defined dates or intervals.
Filter	A set of matching criteria which is defined by a lead buyer for a lead provider channel for a unique time period, and allows the lead buyer to receive inquiries from that source. Information that can be specified for a filter includes inquiry pricing rules and effective time period.
Form Post Instructions	The set of inquiry posting instructions provided by the lead buyer to the lead provider, which contains information on interfacing with the lead provider such as external references. When a lead buyer exposes form post instructions to specific lead providers and channels, the lead provider can view these FPI details from the *Form Post Instructions* screen. This information includes posting instructions, tables of required and supported form post parameters, and auto-generated form code. The lead provider can also retrieve documents that have been uploaded by the lead buyer as well as view the lead buyer's school/campus/program metadata from *Form Post Instructions* screen.
FPI	See **Form Post Instructions**.
Good Inquiry	Typically, a billable inquiry which has been received by the Sparkroom application and is worthy of follow up. Once it is processed by the application, a good inquiry is normally forwarded to the lead buyer (if it does not exceed the target group cap or defined pricing) who pays the lead provider for the inquiry (although system behavior

Glossary Term	Definition
	ultimately depends on how the application has been configured per the lead buyer's business requirements). See also **Verification Code**.
Graph	An additional analytical tool which is available for all dashboard views which allows you to view data in graphical format.
Graph Series	The measure that you want to be included for your dashboard view graph.
Graph Type	The type of graph display that you can select from a dashboard view. You can choose from bar, trend, or time of day.
Inquiry	A lead submitted to a lead buyer from the lead provider. Each inquiry is processed in the Sparkroom application; typically, good inquiries are forwarded to the lead buyer while bad inquiries are rejected (if it does not exceed the lead buyer's target group cap or inquiry pricing).
Keywords	Words which a school or program use to drive traffic via search engine optimization for any web page promoting it. These keywords are exposed to lead providers through the *Form Post Instructions* screen so they can use them in their web sites.
Lead	See **Inquiry**.
Lead Buyer	The company which purchases inquiries from a lead provider; the lead buyer is usually the customer using the Sparkroom application and is the audience for this Online Help.
Lead ID	See **LMS ID**.
Lead Processing	The Sparkroom process whereby an inquiry is matched to a filter, target group, and pricing group before it is forwarded to the lead buyer. This matching is based on various criteria configured in the application. Lead processing occurs after lead scrubbing. See also **Lead Scrubbing**.
Lead Provider	A company which generates and sells inquiries.
Lead Provider Relationship	Criteria that is configured for a lead provider which defines the relationship between the lead buyer and the lead provider [e.g., the lead provider's tier, alias(es), security settings, pricing groups, and cap alerts].
Lead Scrubbing	The initial Sparkroom processing stage for an inquiry, whereby it is treated according to the lead buyer's lead capture script logic. Based on the lead scrubbing results, the inquiry may be marked "bad" and rejected to the lead provider or marked "good" and moved to the lead processing stage.
Lead Status	See **Verification Status**.
LMS ID	Lead Management System Identifier. The identification number assigned to an inquiry by the Sparkroom application; this ID is used internally to identify the inquiry.
Measure	A method of analyzing data which can be applied to a pivot or dashboard view. When configuring a pivot or dashboard view, the lead provider can define which measures they want to use to analyze the selected data group, such as lead count or cycle times.
Media	Pictures, logos, and video files which can be added to a lead buyer's campus, school, and program descriptions (these would typically be used on web sites).
Metadata	See **Content**.
Military Affiliation	The military organization associated with an inquiry. For example, a lead buyer can set specific targets for inquiries related to a military organization, or set pricing based on military-affiliated inquiries.
Pivot Dimension	See **Dimension**.
Pivot Measure	See **Measure**.
Pivot Slicer	See **Dimension**.
Pivot View	An interactive analytical tool which allows the lead provider to summarize and query large amounts of aggregated data. This may include summarizing data by categories and subcategories, expanding and collapsing levels of data, drilling down to view additional details, moving rows and columns to view various types of data summaries, creating graphs, sorting and grouping data, and exporting to PDF and Excel reports. While the pivot view *query* determines what information is retrieved from the database, the pivot view *configuration* determines how the information is presented and summarized from the Sparkroom GUI. See also **Pivot View Query**.
Pivot View Query	The selection of slicers/dimensions and measures that are used to determine what information is retrieved from the database for a pivot view. See also **Pivot View**.

Glossary Term	Definition
Pricing Group	Matching criteria that identifies a set of inquiries the lead buyer want to assign the same pricing to (e.g., by school, campus, program, military affiliation, postal area, and so on). Based on how inquiry pricing has been defined by a pricing group, the lead buyer may only accept inquiries from lead providers that are within the price threshold.
Program	The course offered by a school's campus for which inquiries are received by the lead buyer. A program is part of a lead buyer's division > school > campus > program hierarchy.
Rating	See **Scoring System**.
Reason Code	See **Response Code** or **Verification Code**.
Rejected Inquiry	See **Bad Inquiry**.
Report	See **Canned Report**.
Response Code	The status code assigned to an inquiry to identify whether it is a "good" or a "bad' inquiry with a specific reason assigned (e.g., "Bad Lead - Invalid Email Address"). Response codes are similar to verification codes except that the latter are intended for internal application use only, while response codes are provided to the lead provider when an inquiry is rejected or when the lead provider logs into the Sparkroom application to view inquiry information.
Restrictions	When setting up campuses and programs, a lead buyer can define restrictions to identify applicants who are restricted by the campus or program (e.g., a campus may only accept mature students or English speaking applicants).
Security Group	Determines the access permissions for a group of users; users that are assigned to the security group are given the permissions that have been configured for the group.
School	Typically, the lead buyer purchasing inquiries from lead providers. A school is part of a lead buyer's division > school > campus > program hierarchy.
Scoring System	A third party scoring application that may be used by a lead buyer to assign scoring and compliance ratings to inquiries. Lead scoring results from the scoring system can be received by Sparkroom and used in analytics and/or inquiry pricing.
Slicer	See **Dimension**.
Sparkroom	See **Application**.
Start Page	The initial screen displayed when a user logs into the application. Any screen can be set as a user's start page, which essentially provides a shortcut to their most frequently visited area of the application.
Status	An element's status in the Sparkroom application. Depending on the element, status options may include active (i.e., it is visible and available in the application), inactive (i.e., it is visible but not included in lead capture logic and analytics), and archived (i.e., it is neither visible nor included in lead capture logic or analytics).
System	See **Application**.
Targets and Target Groups	While a target group is criteria that defines which schools, campuses, programs, and military affiliations the lead buyer wants to set targets for, targets are the daily and monthly "caps" or "allocations" that the lead buyer gives to the target group. Depending on the daily and monthly targets that are allocated to the target group, the lead buyer will not receive more than x number of inquiries from x lead provider channel.
Target Group	See **Targets and Target Groups**.
Taxonomy	A pre-defined classification; in the Sparkroom application, taxonomy refers to the classification used for programs which is based on the U.S. Department of Education Standard, the CIP (Classification of Instructional Programs).
User	The individual who is using the Sparkroom application (e.g., from the perspective of this Online Help, the user would be the lead provider).
Vendor	See **Lead Provider**.
Vendor Channel	See **Channel**.
Vendor Relationship	See **Lead Provider Relationship**.
Verification Code	The "good" or "bad" status assigned to an inquiry after the scrubbing process and the associated reason code (e.g., "Bad - Missing Required Fields"). Verification codes are used internally by the Sparkroom application. When an inquiry is processed by the

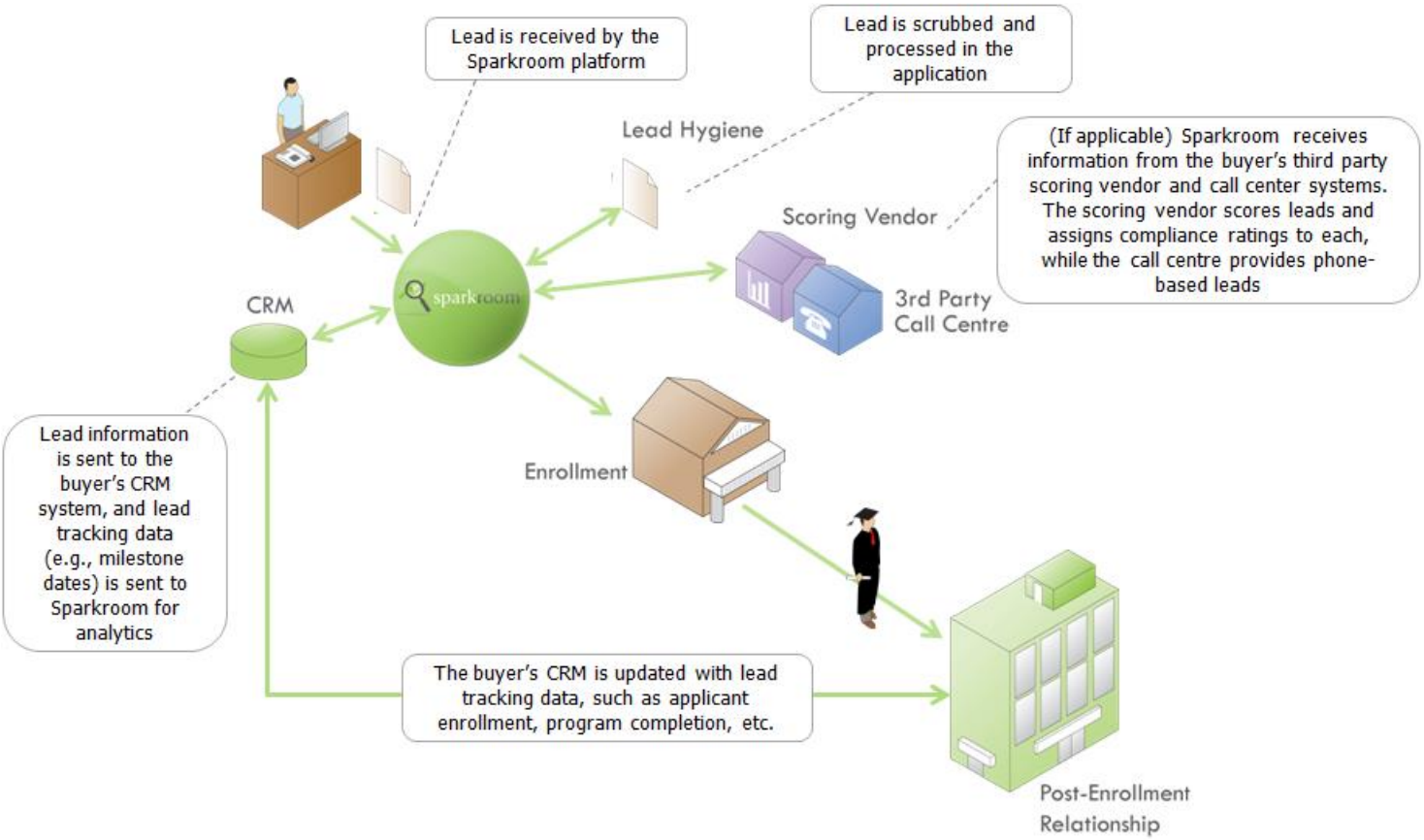
Glossary Term	Definition
	application, the system assigns a verification code to the inquiry based on the results.
Verification Status	The string associated with a verification code. While the verification code is the number Sparkroom returns to the lead provider when the inquiry is posted, the verification status is the corresponding string describing the code.

Sparkroom Overviews

Getting Started

The high level diagram below shows how an inquiry interacts with the Sparkroom system at various stages of its life cycle and how Sparkroom is integrated with the lead buyer's third party systems. Once an inquiry is sent from the lead provider, it is received by the application where it is scrubbed and processed. If the inquiry is deemed to be a "good" lead (and meets the criteria of the lead buyer's lead capture script), it is forwarded to the lead buyer's schools, campuses, and programs for follow up (in some cases, this could be a third party call center which the lead buyer uses to follow up on inquiries).

Sparkroom interfaces with the lead buyer's third party systems in various ways. The lead buyer's CRM system is regularly updated with additional information about the inquiry, such as milestone dates like the applicant's enrollment status and date, program start date, program completion date, and so on, and the CRM, in turn, updates the Sparkroom application with this information to be used in analytics. If the lead buyer is using a third party scoring system, that application scores and rates inquiries sent by Sparkroom and then returns scoring and compliance ratings to the platform to be used in analytics and (if configured) pricing. Finally, Sparkroom may also be integrated with the lead buyer's third party call center which receives phone-based inquiries from individuals and sends these to Sparkroom for processing, or is used to follow up on inquiries.

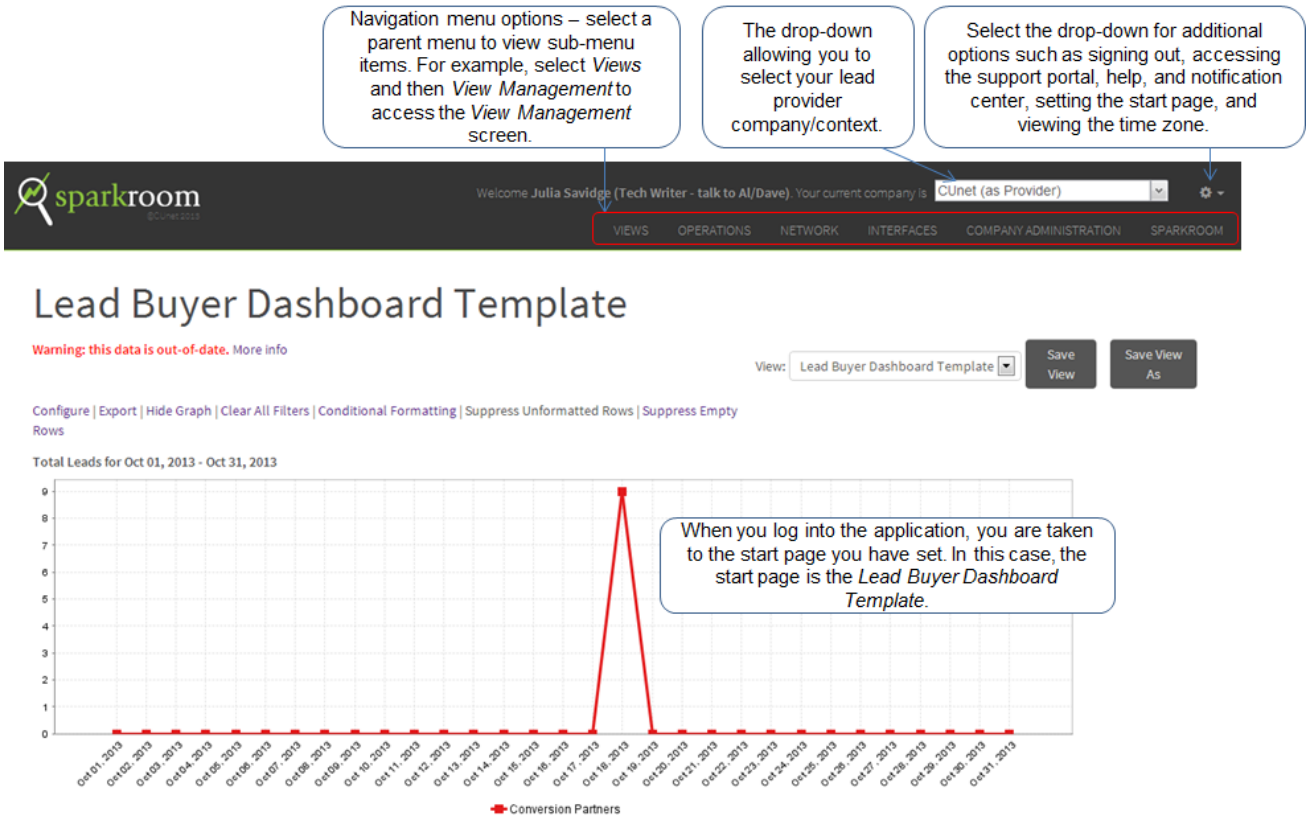


Note: A lead buyer can be set up to automatically receive an invoice from the lead provider via email. If the lead buyer chooses this configuration, they would receive the invoice on the specified day of each month. While the lead buyer must opt for this type of invoice notification when setting up their lead provider relationship, a Sparkroom administrator must set this up for the lead provider via Company Administration > Company Configuration > Invoice Subscriptions.

Note: A lead provider can also be set up to automatically receive an alert when inquiries that were originally accepted by a lead buyer have been made non-billable. This allows lead providers to be immediately notified when a lead buyer "scrubs out" their inquiry post-capture, based on call center dispositions or other downstream qualification checks, enabling them to respond quickly to improve quality as well as avoid surprises during month-end invoicing. This scrub alert must be set up for the lead provider by a Sparkroom Administrator via Company Administration > Company Configuration > Scrub Alert.

Viewing the Sparkroom Application

The following diagram provides an overview of the Sparkroom application and describes the main features of the GUI interface:



Upon request by a school or lead provider, a vendor will be assigned a user name and password. A lead provider account has a number of built-in security measures, as follows:

- A lead provider account enables a user to see information solely about the inquiries which they have directly provided to one or more schools. They cannot see any information about inquiries provided by any other source.
- A lead provider can see only aggregate performance data limited to good leads, bad leads, cost, pacing and cap information (if applicable for a given school).
- Conversion and cost/enrollment and cost/start metrics can be optionally shared, if the school wishes to do so.
- Lead detail information is limited to basic information posted in the lead.
- Conversion milestone dates and lead score information can be optionally shared at the lead detail level, if the school wishes to do so.
- Accounts are set up with a 90 day password expiry policy.

Viewing Lead Buyer Restrictions

From the *Buyer Restrictions* screen, you can view which lead buyers have placed restrictions on receiving inquiries from one of your channels. For each restriction, the lead buyer name, channel, school, and the restricted campus and program are listed. When a lead buyer creates a restriction for a lead provider channel, the restriction is placed on the selected campus(es) and program(s); therefore, if you send an inquiry to one of these campuses/programs, it will be rejected and given a "bad" response code (SR-553 - Rejected by Buyer Restrictions) by the Sparkroom application.

While you cannot change the restrictions that are displayed from the *Buyer Restrictions* screen, you can export the information for offline recording or follow up. (In order to access the *Buyer Restrictions* screen, you must have been set up with the required permissions by an administrator via the *Group Management* screen).

Viewing the Form Post Instructions Screen

From the *Form Post Instructions* screen, you can view inquiry information for each channel (see *Process Step - Viewing the Form Post Instructions Screen* for information on viewing this screen). For each lead buyer you have a relationship with, you can select one of the channels from the *Form Post Instructions* screen and view instructions for posting from that channel to the lead buyer. Depending on what the lead buyer has shared, you may view posting instructions, tables of required and supported form post parameters (along with all valid name/value pairs for list parameters), and auto-generated form code (as well as test the code by submitting a test form and viewing the response code in real-time). In addition, you can export the form post instructions for offline use via the *Export* link from the *Actions* column (which exports the information to a PDF file) as well as download documents which have been made available to you by the lead buyer.

Viewing Dashboards

Dashboard View Overview

Dashboard views allow you to create tables of aggregated inquiry data for selected time periods. For lead providers, the Lead Buyer Dashboard template can be used to configure custom views. These dashboards show data, depending on the measures selected, for inquiries received by the selected lead buyers/target groups/channels and are useful for analyzing inquiry counts, rates, and revenue for inquiries received by the lead buyer. Selection criteria includes contact method, applicant state/province, requested school, campus, program, degree type and campus type, captured lead status, and more. You must select at least one criteria from each selection criteria group when configuring a dashboard view.

A dashboard can be saved and made available from the *View Management* screen under Dashboard Views. From there, you can create, configure, rename, delete, make searchable, email, and share the view, as well as schedule the view for export to email or FTP; see *Viewing View Management* for more information on this feature.

For each dashboard view, you can show or hide empty (null) rows, show or hide unformatted rows, filter selected column headings [i.e., *Lead Buyer*, *Target Group*, and *Channel* (clear filter selections by clicking Clear Filters)], sort the data table by columns, drill down the data table to view additional inquiry details, show or hide the graph, select a graph type, and select a graph series. While hiding empty or unformatted rows ensures that only rows containing data or conditional formatting, respectively, are included in the data table, the sort functions allow you to sort data by any table column. When using conditional formatting, you can apply colored highlighting to any currently displayed measure on a view, based on data thresholds, which enables the end user to focus on the most important data at hand. For example, you may highlight billable lead counts that are below par red and billable lead counts above par green to indicate which channels are performing well and which are under performing for a selected month. Conditional formatting is saved along with the dashboard view and included in export formats.

Showing and defining the graph, on the other hand, provides you with an additional way of viewing and analyzing the dashboard data: select your graph series (the available options map to the measures you selected when defining your dashboard view criteria) to determine the type of data you want to analyze in the graph, and then choose your graph type. A bar graph shows the graph in "bar" format for the selected time period, while Trend shows a line graph for which you can specify an additional date range as well as a trend period (i.e., by day, by week) to view trends of data over x time period. Time of Day, on the other hand, allows you to compare dashboard data by "time of day": select a time value, such as today or yesterday, to compare to another time value such as none, yesterday, one week earlier, four weeks earlier, or four weeks average. For example, if you select "today" to compare to "one week earlier", a line graph compares today's data with data from one week ago.

Note: The graph types available to you may differ depending on the type of dashboard you are viewing.

Once you have selected your graph series and graph type, you must select which rows of table data you want to include in the graph. Selecting or clearing the check box beside a row determines whether that information is included in the graph. You can change your graph criteria at any time and then click Update Graph to generate a new graph.

Lead Buyer Dashboard

Lead providers use the Lead Buyer Dashboard to gain summary information about inquiries which they have provided to schools. The dashboard breaks out inquiry information based on the:

- Lead buyer, or school.
- Target group, which represents a media plan grouping established by the school. Target groups can be based on any combination of campuses or programs, or rolled up to the entire school. For example, a school might break out their online and campus programs as two separate target groups for media planning purposes.
- Product, which is the type of product provided by the lead provider, such as shared, exclusive, call verified, or 800#.

If a provider offers more than one type of lead generation product then each will be broken out separately in the dashboard.

Lead Buyer Dashboard Use Case Scenario

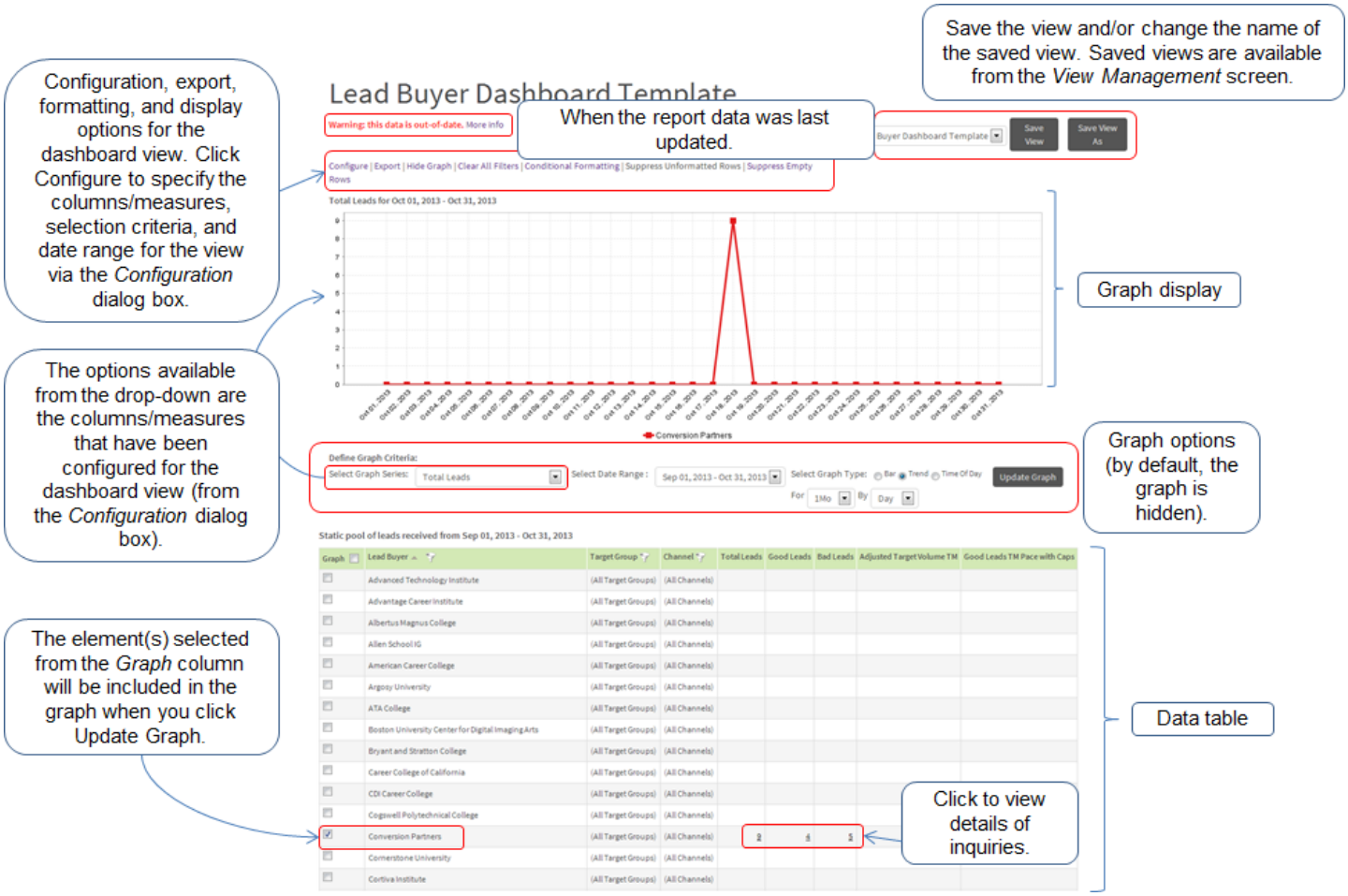
The following scenario describes how Jason, a lead provider, could use the Lead Buyer dashboard view:

- Using the *Lead Buyer Dashboard View* template, Jason creates a view to show how inquiries from certain channels have performed for the year to date. From the *Date Period* tab, he selects "year to date"; from the *Selection Criteria* tab, he selects all lead buyers, target groups, channels, applicant states, requested programs, campus types, and schools; and from the *Columns Included* tab he selects "Lead Count - Enrolled", "Lead Count - Interview Scheduled", "Rate - Enrolled", and "Rate - Interview Scheduled".

  Based on this configuration, the dashboard view will display the number of inquiries for which interviews were scheduled, the number of inquiries which enrolled, the inquiry rate per enrollment, and the inquiry rate per scheduled interview for all inquiries received in the current year so far by Jason's lead buyers (for all target groups and channels) regardless of applicant state or requested program, campus type, or school. Jason uses this dashboard to get a high level view of how his inquiries are performing for the year.

Dashboard View Application Diagram

The following diagram shows an example of a Lead Buyer dashboard view and provides call outs to the main areas of the screen:



Defining Dashboard View Criteria

When creating a view, you must first determine the type of dashboard view based on the data you want to analyze. You then define what data the view should contain by selecting your view criteria from the *Configuration* dialog box of the dashboard (i.e., the date range, measures, and selection criteria).

Date Period

From the *Date Periods* tab, you can select from a number of date range options - such as week/month/quarter/year to date, absolute start and end dates, or "custom" to configure advanced date range logic - in order to determine the *received* date range of inquiries to include in the data table. The system selects inquiries for analysis based on the date

they were received by the Sparkroom application for your selected range.

Selection Criteria

From the *Selection Criteria* tab, you can customize what inquiries will be used for analysis when creating the data table. While defining the time period (above) determines the *range* of inquiry data to include in the data table, the selection criteria tell the system *what* inquiry data to include.

Although criteria varies between dashboards, the top-most criteria available is typically displayed as the left hand column(s) in the data table. While not all selection criteria you choose may be included as columns in the data table, all criteria is nevertheless included when determining the data group for analysis. For example, if you create a Lead Buyer dashboard view and include selection criteria for all lead buyers, target groups, and channels as well as all requested programs, degree types, and campus types, the data table will include inquiry data for all lead buyers, target groups, channels, requested programs, degree types, and campus types, but will only show the *Lead Buyer*, *Target Group*, and *Channel* columns in the view [however, measures configured for the view (see below) may be displayed as columns].

Measures/Columns

From the *Columns Included* tab, by specifying which columns to include in the view you can determine the measures you want to use to aggregate the lead data. For example, if you select "lead count - enrolled", this measure will be displayed as a column in the view, and the system will calculate the number of enrolled inquiries for the range of data you selected (i.e., from the *Date Periods* and *Selection Criteria* tabs).

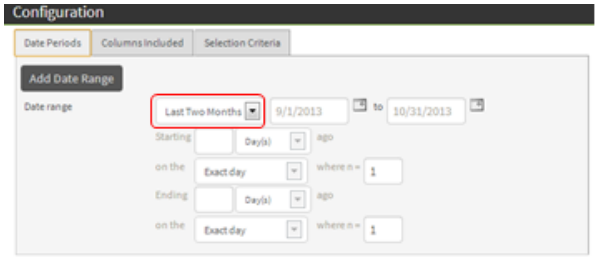
Note: Depending on the lead buyer's configuration, not all measures may contain data. Also, the measures you select from this tab also appear as options from the *Select Graph Series* drop-down when defining graph criteria for the view.

Click here to view a diagram showing how a dashboard view is generated using the above view criteria.

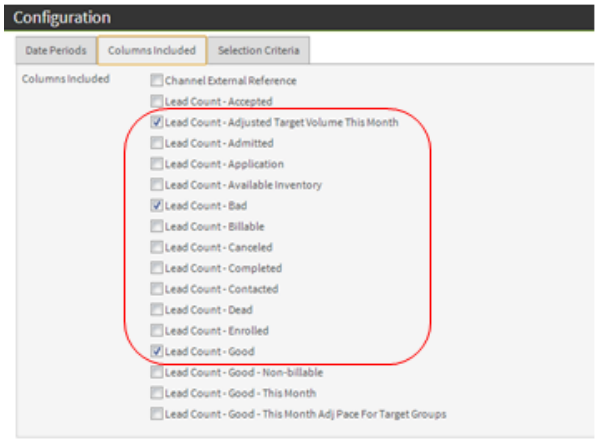
Defining Dashboard View Criteria - Application Diagram

The following diagram shows a user selecting view criteria for a Lead Buyer Dashboard View:

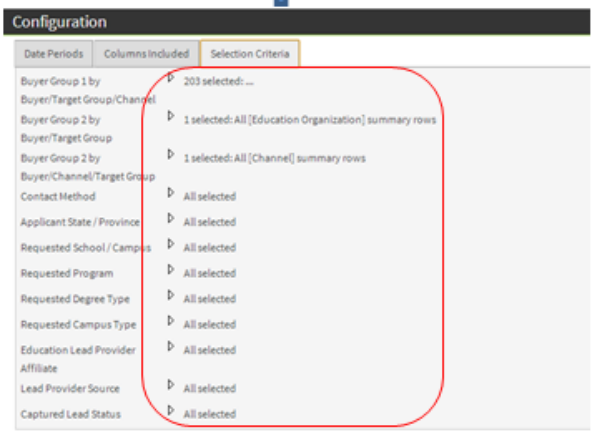
Note: Because the selection criteria is "and-ed" together by the system when determining the data set (e.g., lead category=x + state=Y), the order of selection does not matter.



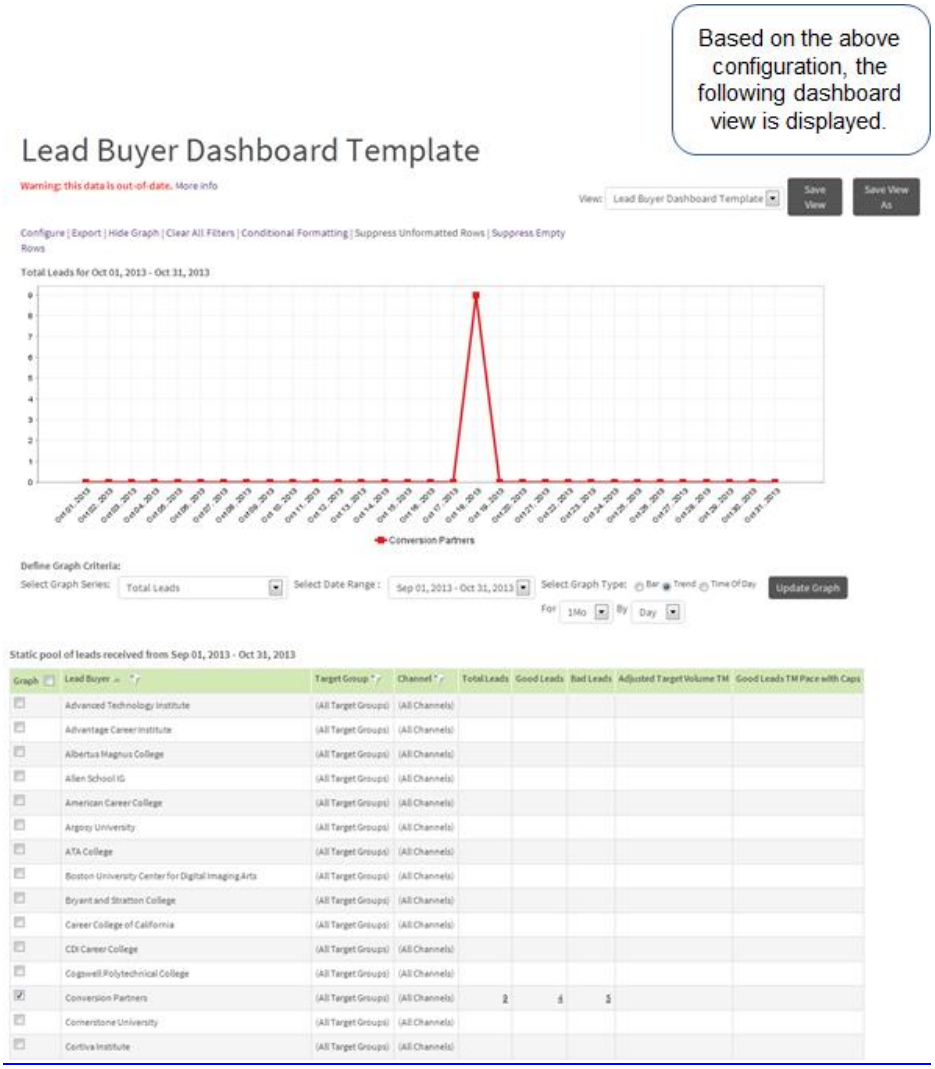
From the *Date Periods* tab, select the date range for the dashboard view.



From the *Columns Included* tab, select the measure(s) to include in the dashboard view. Only data for the selected measure(s) is generated in the report (e.g., good lead counts) and the measure is included as a column in the view.



From the *Selection Criteria* tab, choose which inquiry criteria you want to include in the dashboard view. Only inquiries that match the selection criteria are included in the report (e.g., lead buyer x and y, etc.)



Dashboard View Measures

The dashboard measures described in the table below are available when creating a dashboard view (refer to *Process Step - Creating and Configuring a Dashboard View* for information on how to use these measures to build a dashboard view). Depending on the dashboard view you are creating, some measures may not be available.

Measure	Definition
Channel External Reference	The channel's external reference, as defined by the lead provider.
Lead Count - Accepted	The number of good inquiries with the accepted date completed.
Lead Count - Adjusted Target Volume This Month	The number of good inquiries with an adjusted target goal for the month (this is based on the adjusted target value from the *Target Management* screen).
Lead Count - Admitted	The number of good inquiries with the admitted date completed.
Lead Count - Application	The number of good inquiries with the applied date completed.
Lead Count - Available Inventory	The difference between this month's allocation and the number of good inquiries received so far.
Lead Count - Bad	The number of bad inquiries.
Lead Count - Billable	The number of billable inquiries.
Lead Count - Canceled	The number of good inquiries with the canceled date completed.
Lead Count - Completed	The number of good inquiries with the completed date completed.
Lead Count - Contacted	The number of good inquiries with the contacted date completed.

Measure	Definition
Lead Count - Dead	The number of good inquiries received with the dead lead date completed.
Lead Count - Enrolled	The number of good inquiries with the enrolled date completed.
Lead Count - Good	The number of good inquiries.
Lead Count - Good - Non Billable	The number of non-billable good inquiries.
Lead Count - Good - This Month	The number of good inquiries received from the beginning of the month to today's date.
Lead Count - Good - This Month Adj Pace For Target Groups	The forecasted pace for the inquiries for the current month, based on the percentage of the total forecasted volume received so far. This measure is similar to the "Lead Count - Good - This Month Adj Pace" measure but takes into account "wiggles", which are uploadable adjustments the lead buyer can make which account for business cycles (e.g., January is typically a busy month and the first week is usually busier than the last two weeks). This measure is calculated as the sum of the "Lead Count - Good - This Month" measure for all inquiries received this month, divided by the "Rate - Target Percent Finish Factor This Month" measure.
Lead Count - Good - This Month Pace with Caps	This measure is a variation of the "Lead Count - Good - This Month Adj Pace" measure, whereby the number of inquiries likely to be received this month, adjusted for allocations, is displayed. For example, if an allocation is set at 20 and the expected volume is actually 18, this value will show 18. However, if the expected volume is 30, this value will show 20 (i.e., the allocation) because the allocation is set and the lead buyer will not therefore receive more than 20 inquiries.
Lead Count - Interview Scheduled	The number of good inquiries with the interview scheduled date completed.
Lead Count - Monthly Cap	The monthly allocation for the inquiries.
Lead Count - Non Billable	The number of non-billable inquiries.
Lead Count - Started	The number of good inquiries with the started date completed.
Lead Count - Target Volume Next Month	The next month's target volume by target group and lead provider. This measure enables you to report on monthly allocations prior to the start of the month. For example, if the start of the month falls on a weekend you could use this measure to see upcoming allocations and plan campaigns to reduce interruptions in lead flow.
Lead Count - Target Volume This Month	The current month's target volume by target group and lead provider.
Lead Count - Total	The number of good and bad inquiries.
Lead Count - Transferred	The number of good inquiries with the transferred date completed.
Lead Count - Viewed	The number of good inquiries with the viewed date completed.
Lead Count - Visited	The number of good inquiries with the visited date completed.
Lead Count - Withdrawn	The number of good inquiries with the withdrawn date completed.
Rate - Accepted	The number of good inquiries with an accepted date divided by the total number of good inquiries, multiplied by 100%.
Rate - Admitted	The number of good inquiries with an admitted date divided by the total number of good inquiries, multiplied by 100%.
Rate - Application	The number of good inquiries with an application date divided by the total number of good inquiries, multiplied by 100%.
Rate - Bad	The number of bad inquiries divided by the total number of inquiries, multiplied by 100%.
Rate - Canceled	The number of good inquiries with a canceled date divided by the total number of good inquiries, multiplied by 100%.
Rate - Completed	The number of good inquiries with a completed date divided by the total number of good inquiries, multiplied by 100%.
Rate - Contacted	The number of good inquiries with a contacted date divided by the total number of good inquiries, multiplied by 100%.
Rate - Dead	The number of good inquiries with a dead lead date divided by the total number of good inquiries, multiplied by 100%.
Rate - Enrolled	The number of good inquiries with an enrolled date divided by the total number of good inquiries, multiplied by 100%.

Measure	Definition
Rate - Good	The number of good inquiries divided by the total number of inquiries, multiplied by 100%.
Rate - Interview Scheduled	The number of good inquiries with an interview scheduled date divided by the total number of good inquiries, multiplied by 100%.
Rate - Started	The number of good inquiries with a started date divided by the total number of good inquiries, multiplied by 100%.
Rate - Target - Percent Finish Factor This Month	The percentage ratio of the expected current month's lead volume based on the day of the month. This is usually calculated as the total number of days in the month divided by the current day in the month (1 - 31), although some lead buyers have custom "weightings" based on "seasonality" and historical performance.
Rate - Target - Percent Good Leads to Cap This Month	The percentage ratio of good inquiries received relative to the current month's allocation.
Rate - Target - Percent Pace to Cap This Month	The percentage ratio of the pace relative to the current month's allocation. If the lead buyer is pacing to exceed the allocation, this would be 100%.
Rate - Transferred	The number of good inquiries with a transferred date divided by the total number of good inquiries, multiplied by 100%.
Rate - Viewed	The number of good inquiries with a viewed date divided by the total number of good inquiries, multiplied by 100%.
Rate - Visited	The number of good inquiries with a visited date divided by the total number of good inquiries, multiplied by 100%.
Rate - Withdrawn	The number of good inquiries with a withdrawn date divided by the total number of good inquiries, multiplied by 100%.
Revenue - Forecast Revenue This Month For Target Groups	The forecasted revenue the lead provider will make from a lead buyer at the end of the month, based on the number of billable inquiries it has already delivered and adjusted for the target group allocation.
Revenue - Media - Average	The average revenue per billable inquiry.
Revenue - Media - CPI	The total revenue for all billable inquiries priced on a cost per inquiry (CPI) basis.
Revenue - Media - Non-CPI	The total revenue for all billable inquiries priced using "time period-based" costing.
Revenue - Media - Per Application	The total revenue made by the lead provider, divided across the number of inquiries which applied. Whereas the “Revenue - Total - Per Application” measure includes all revenue (i.e., CPI, time period-based and processing fees), this measure includes only inquiries priced on a CPI basis.
Revenue - Media - Per Enrollment	The total revenue made by the lead provider, divided across the number of inquiries which became enrolled students. Whereas the “Revenue - Total - Per Enrollment” measure includes all revenue (i.e., CPI, time period-based and processing fees), this measure includes only inquiries priced on a CPI basis.
Revenue - Media - Per Start	The total revenue made by the lead provider, divided across the number of inquiries which became students who started the program. Whereas the “Revenue - Total - Per Start” measure includes all revenue (i.e., CPI, time period-based and processing fees), this measure includes only inquiries priced on a CPI basis.
Revenue - Media - Total	The total revenue made by the lead provider, including all types of inquiries (i.e., CPI and time period-based) and all associated fees.
Revenue - Processing Fees	The total revenue paid by the lead buyer to the provider for processing fees. For example, the lead provider may score their inquiries using the third party system TargusInfo before submitting to the lead buyer, and then pass the scoring cost onto the buyer. The lead buyer pays revenue to the lead provider to cover the cost, which this measure shows.
Revenue - Total - Average	The total revenue made by the lead provider for all types of inquiries (i.e., CPI and time period-based) and all processing fees, averaged across the number of billable inquiries.
Revenue - Total - Per Application	The average revenue that a lead provider makes for each inquiry which converts in to an application.
Revenue - Total - Per Enrollment	The total revenue made by the lead provider, divided across the number of inquiries which became enrolled students. This measure includes all revenue (i.e., CPI, time period-based, and processing fees).

Measure	Definition
Revenue - Total - Per Start	The total revenue made by the lead provider, divided across the number of inquiries which became students who started the program. This measure includes all revenue (i.e., CPI, time period-based and processing fees).
Revenue - Total Media and Fees	The total revenue for all billable inquiries. This measure includes inquiries priced by CPI, inquiries priced by time period-based costing and processing fees.

Viewing the Pivot Analysis Tool

Pivot View Overview

The Pivot Analysis Tool allows you to query and analyze data based on a series of dimensions (also referred to as "slicers" in the application) and measures available to you. A dimension is a category of information you can include in a pivot view to define the data group, and which you can use to drill down to particular elements as required. For example, if you select the "Billable Lead Status" dimension, you can then select Yes and/or No status values to include in the view (any billable lead status which has been defined in the application will appear as a selection from the list). A measure, on the other hand, allows you to define the criteria used to analyze the data such as the lead cost or lead count.

When creating a pivot view, you first build a query by selecting the measure(s) and dimension(s) to include in the report. This determines what data will be retrieved from the database. Each time you open a saved pivot view, the system retrieves the latest inquiry data from the database which matches the range and type of data specified in your query.

Note: There is a two year limitation on pivot data. That is, any lead with a received data prior to two years ago (i.e., today minus two years) will not be found in the Analytics database.

If you are a skilled developer, you have the option of creating or modifying the MDX (multi dimensional expressions) query using the MDX Query Editor available with the application. If you choose this option, it is suggested that you create or modify the query using an external editor and then copy and paste the query into the Sparkroom editor, since the MDX Query Editor cannot validate the query. While the MDX Query Editor is available to you, however, you will most likely create your query using the "Select Rows, Queries, and Slicers" icon available from the pivot analysis tool which allows you to select each dimension and measure you want to include in the pivot view.

In addition to defining what data you want to retrieve from the database, you can also define how you want the pivot view to look. Some of this configuration can be done when initially setting up the view, such as determining which measures and dimensions will appear as rows versus columns (or which will be included in the query but not displayed as rows or columns from the view), while additional elements of the view appearance can be modified from the view itself, allowing you to "slice and dice" data based on your requirements and preferences. For example, you can swap row and column axes, suppress empty rows and columns so that null values are hidden, show parent values to display additional elements of a data hierarchy, or hide spans so that repeating column and row headers are not shown. This granular level of configuration enables you to change a pivot view's appearance so that only the necessary data is displayed while non-required data is not. In addition, you can change the view's query at any time if you want to modify the measure(s) and dimension(s) and therefore change the type and scope of the data retrieved from the database for analysis.

Further, you can choose to display a graph with the pivot view and configure it to meet your specific requirements. By customizing the graph title, axes labels and fonts, legend placement and font, and background color, you can configure the look and feel of the graph to suit your personal preference or your company's branding. In addition to adding and modifying a graph, you can also export the view data to PDF or Excel formats and, for the PDF output, specify print settings such as report title, page orientation and size, and table width.

Once you change pivot view elements, you can save the view using a new name (in which case a new view is created with the updated configuration) or using the existing name (in which case the view is overwritten with the new configuration). The latter option is only available, however, if you created the original pivot view and not if it was created by another user. Pivot views created by other users are available to you only if the view's owner shares it with you or assigns ownership of the view to you. Any pivot view can be saved and made available from the *View Management* screen under Pivot Views. From there, you can rename, delete, make searchable, email, and share the view, as well as schedule the view for export to email or FTP; see *Viewing View Management* for more information on this feature.

Click here for a description of each icon available from the pivot analysis tool (these can be used to configure the pivot query or pivot view appearance).

Pivot View Use Case Scenario

The following scenario describes how Jason, a lead provider, could use the Pivot Analysis Tool:

Jason decides to use the Pivot Analysis Tool to analyze billable and non-billable inquiry counts by each lead buyer's target group and channel over the past three months to determine how well his inquiries are doing. He opts for the pivot view over a dashboard view because he requires more granularity in his results and the ability to modify how the data is presented in the view. In addition, Jason wants to export the view results to a PDF file but to initially format the print job and the graph based on personal preferences.

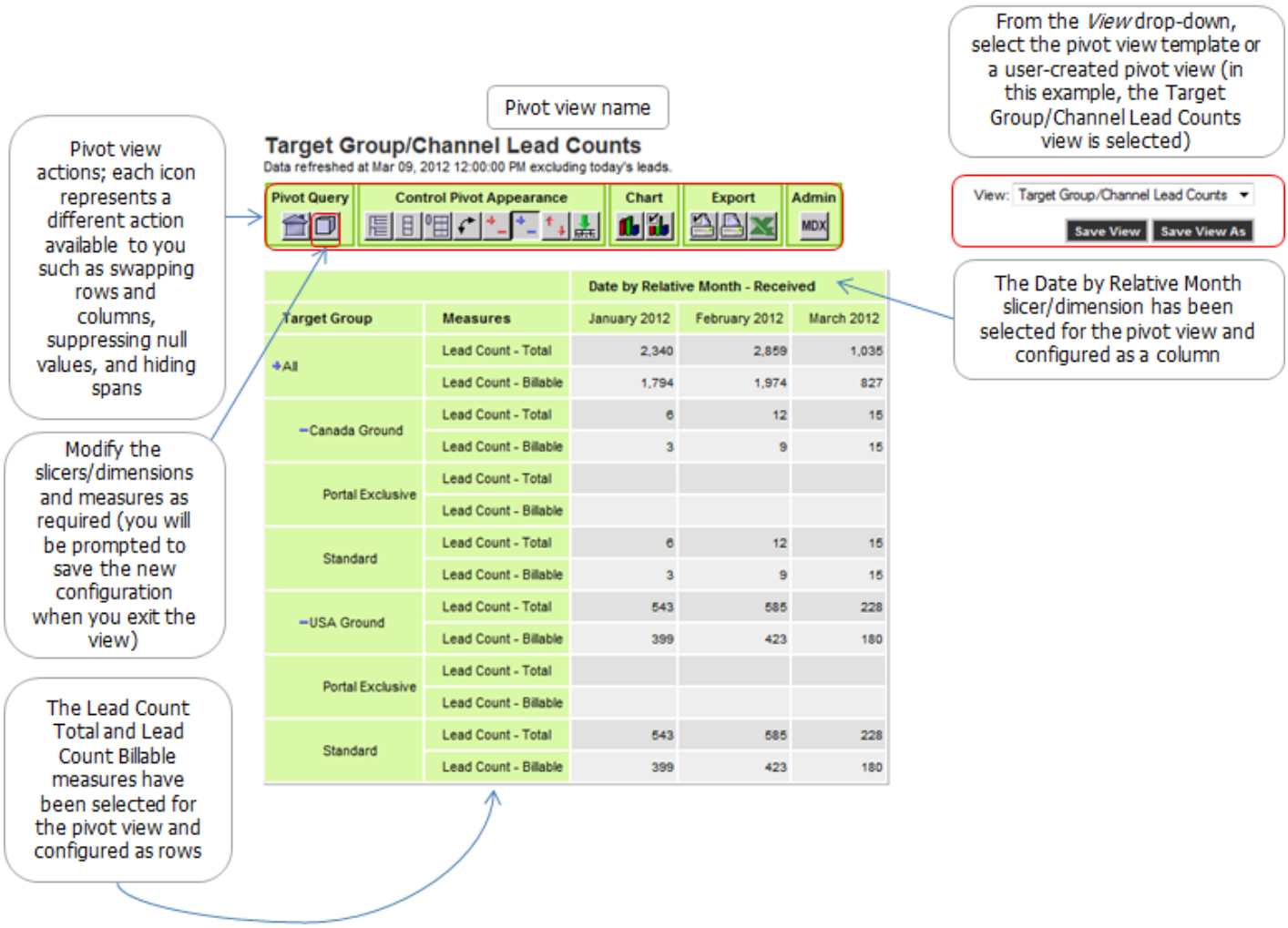
Jason first creates the pivot query by selecting the date dimension "date by relative month - received", specifying January, February, and March 2012 as the months relative to December 2011 in order to show January to March data for all leads received in December. Next, he selects the "lead count - total" and "lead count - billable" measures (configured as rows) and the target group dimension (configured as a column, with specific target groups and channels chosen). These elements will configure the pivot view to show the total number of all inquiries as well as the number of billable inquiries received by the target group and channel during the specified time period.

Jason creates the view using the above criteria and then configures a chart for the view. He defines the chart as a horizontal bar with the title "Lead Counts", sets the horizontal and vertical axes labels and fonts, and then sets the background color to light blue. Once Jason is satisfied with these results, he configures the print settings to include the report title "Lead Counts", a portrait orientation, A4 paper size, and the graph printed on a separate page.

Jason can now select the Lead Counts pivot view each time he logs into the Sparkroom application and analyze inquiry counts for the selected dimensions and measure. Each time he opens the view, he analyzes the most recent data as of the system's last scheduled update and, as required, exports the results to a PDF file for group distribution and further analysis.

Pivot View Application Diagram

The following diagram shows an example of a pivot view and provides call outs to the main areas of the screen:



Pivot View Icons

The following table describes each icon available from the Pivot Analysis Tool; depending on the icon, each can be used to configure the pivot query, pivot view appearance, or the export and print settings.

Icon	Name	Description
	Reset query	Resets the pivot query to the starting view. If you are working with the pivot view template, the query is returned to its original format; if you are working with a user-created pivot view, the query is returned to its last saved state.
	Set rows, columns and slicers	Allows you to create the pivot view query by selecting measures and dimensions to include in the view, including configuring as a row or column and determining the presentation order of each.
	Show (or hide) parent members	Displays the parent member(s) of a query in their separate row or column, as opposed to being placed within the same row or column as the children.
	Hide (or show) spans	Prevents the display of repeating headers when multiple dimensions are nested for a row or column.
	Suppress empty rows and columns	Suppresses the display of a row or column containing null values.
	Swap axis	Interchanges rows and columns in the pivot view.
	Show (or hide) the chart	Enables charting; shows the graph in the pivot view.
	Configure chart settings	Allows you to configure the graph settings, including the graph type, axes labels and fonts, graph title and font, and background color.
	Configure print settings	Allows you to configure the print settings, including the page layout, report title, page size, and whether the graph will be printed on a separate page. These print settings are used to determine how the exported PDF file is printed.
	Print this page via PDF	Exports the pivot view to a PDF file, from where you can save and print the data. The PDF appearance is determined using the print settings configured via the  icon.
	Export page to Excel	Exports the pivot view to an Excel file, from where you can format, sort, save, and print the data.
	Edit MDX query	Opens the MDX Query Editor, from where you can create and edit the MDX query for the pivot view. This editor is intended for advanced developers only and does not provide query validation.

Pivot View Dimensions (Slicers)

The following pivot dimensions/slicers are available when configuring a pivot view (refer to *Creating the Pivot View Query* for steps on creating a pivot view):

Pivot Dimension/Slicer	Description
Date Dimensions	Date-related dimensions that can be specified as absolute or relative. Absolute date dimensions do not change if the pivot query is saved as a view, while a relative date dimension changes over time on a rolling basis (since it is always relative to the current date). The following relative date dimensions are supported (these dates are based on the inquiry received date; i.e., when the inquiry was received by the application): ○ Date by Relative Date Period - Received: A relative date dimension for rolling 60 day periods: ▪ 0-60 days: includes the current day plus the last 60 days ▪ 31-90 days: 31 to 90 days ago, inclusive ▪ 61-120 days: 61 to 120 days ago, inclusive ▪ 91-150 days: 91 to 150 days ago, inclusive ○ Date Received ○ Date by Relative Day - Received ○ Date by Relative Week - Received ○ Date by Relative Month - Received ○ Date by Relative Quarter - Received

Pivot Dimension/Slicer	Description
Billable Lead Status	Whether an inquiry was billable (Y) or non-billable (N).
Captured Lead Status	Whether the inquiry was captured by Sparkroom (Y) or imported from an external system (N).
Channel Type	The lead provider channel which the inquiry was received from.
Contact Method	The lead provider's method of contacting the applicant and generating the inquiry, such as agency, email, digital marketing, etc.
Lead Provider Affiliate	The name of the lead provider's affiliates, if applicable. For example, Edicus (lead buyer) may buy leads from Vendor X (lead provider) which is an aggregator with its own network of lead providers (i.e., affiliates). When Vendor X submits an inquiry, it can choose to include the name or identifier of its affiliate; this lets the lead buyer see where an inquiry originated from as well as allows the lead provider to use Sparkroom to track how its affiliates are performing.
Lead Provider/Buyer	Organizes data by lead provider and lead buyer. This dimension is mostly used for global analysis where the "global" user compares lead buyers against each other.
Lead Provider Source	The lead provider's marketing source for an inquiry, such as search terms or a PPC campaign.
Requested Campus Type	The campus type the applicant requested (this is usually online or ground campus).
Requested Degree Type	The degree level the applicant requested.
Requested Program	The name of the program the applicant requested.
Requested School/Campus	The name of the school, division, and campus the applicant requested. Other attributes of campus, including market, region and campus group, are also supported in this hierarchy.
State/Province	The applicant's state or province.
Sub-Affiliate Channel	The CUnet sub-affiliate channel the inquiry was received from. This pertains to inquiries received from CUnet sub-affiliates for lead buyer custom channels.
Sub-Affiliate Target Group - Target	The target assigned to the sub-affiliate channel. This pertains to inquiries received from CUnet sub-affiliates for lead buyer custom channels.
Target Group	The target group the inquiry belongs to.
Time of Day	The time of day when the inquiry was received, in one hour increments.

Pivot View Measures

The following pivot measures are available when configuring a pivot view (refer to *Configuring a Pivot View* for steps on creating a pivot view). While the measures described in the table are unique to pivot views, the list of measures below the table are common to both dashboard and pivot views and are described in *Dashboard View Measures*:

Pivot Measure	Description
Lead Cost - Average	The average cost of each billable inquiry.
Lead Cost - Forecast Cost This Month for Target Groups	The forecasted cost of inquiries for the current month, based on the percentage of the total forecasted volume (capped based on the target group allocation) received so far. This is calculated as the sum or the total cost for all inquiries received this month, divided by the "Rate - Target Percent Finish Factor This Month" measure.
Lead Cost - Per Application	The average cost of inquiries, per application (i.e., total cost of inquiries divided by the number of applications).
Lead Cost - Per Enrollment	The average cost of inquiries, per enrollment (i.e., total cost of inquiries divided by the number of enrollments).
Lead Cost - Per Start	The average cost of inquiries, per start (i.e., total cost of inquiries divided by the number of starts).
Lead Cost - Total	The total cost of inquiries.
Lead Count - Billable - This Month Adj Pace for Target Groups	The forecasted pace for billable inquiries this month, based on the percentage of the total forecasted volume received so far.
Lead Count - Billable - This Month Pace with Caps	The number of billable inquiries which are likely to be received by the end of the month, based on the number of billable inquiries received so far this month, adjusted for caps.
Lead Count - Total	The total number of inquiries.

The following pivot dimensions are also available for dashboard views; for definitions, please refer to *Dashboard View Measures*:

Channel External Reference
Lead Count - Accepted
Lead Count - Adjusted Target Volume This Month
Lead Count - Admitted
Lead Count - Application
Lead Count - Available Inventory
Lead Count - Bad
Lead Count - Billable
Lead Count - Canceled
Lead Count - Completed
Lead Count - Contacted
Lead Count - Dead
Lead Count - Enrolled
Lead Count - Good
Lead Count - Good - Non-billable
Lead Count - Good - This Month Adj Pace For Target Groups
Lead Count - Good - This Month Pace with Caps
Lead Count - Interview Scheduled
Lead Count - Monthly Cap
Lead Count - Non-billable
Lead Count - Started
Lead Count - Target Volume This Month
Lead Count - Transferred
Lead Count - Viewed
Lead Count - Visited
Lead Count - Withdrawn
Rate - Accepted
Rate - Admitted
Rate - Application
Rate - Bad
Rate - Canceled
Rate - Completed
Rate - Contacted
Rate - Dead
Rate - Enrolled
Rate - Good
Rate - Interview Scheduled
Rate - Started
Rate - Target - Percent Finish Factor This Month
Rate - Target - Percent Good Leads to Cap This Month
Rate - Target - Percent Pace to Cap This Month
Rate - Transferred
Rate - Viewed
Rate - Visited
Rate - Withdrawn
Revenue - Forecast Revenue This Month For Target Groups
Revenue - Media - Average
Revenue - Media - CPI
Revenue - Media - Non-CPI
Revenue - Media - Per Application
Revenue - Media - Per Enrollment
Revenue - Media - Per Start
Revenue - Media - Total

Revenue - Processing Fees
Revenue - Total - Average
Revenue - Total - Per Application
Revenue - Total - Per Enrollment
Revenue - Total - Per Start
Revenue - Total Media and Fees

Analyzer Tool

Analyzer Tool Overview

Note: There is a two year limitation on pivot data. That is, any lead with a received data prior to two years ago (i.e., today minus two years) will not be found in the Analytics database.

When you create a report using the Analyzer Tool, you are creating a collection of fields and filters that are displayed in a specific report format. Just like reports that are created and generated using the Pivot Analysis Tool or canned reports, the report is connected to the database so it displays the latest data based on your selected fields and filters. When you open the Analyzer Tool from the Sparkroom application, you can choose from the basic schema (Analyzer Views > Analyzer Tool) or the advanced schema (Analyzer Views > Advanced Analyzer Tool). The only difference between these selections is that the advanced tool/schema contains additional measures that you can use for your report.

Note: For descriptions of the measures that are available from the Analyzer Tool, click here.

The Analyzer Tool provides you with the tools to build a report and its layout is as follows (for a diagram describing the tool layout, click here):

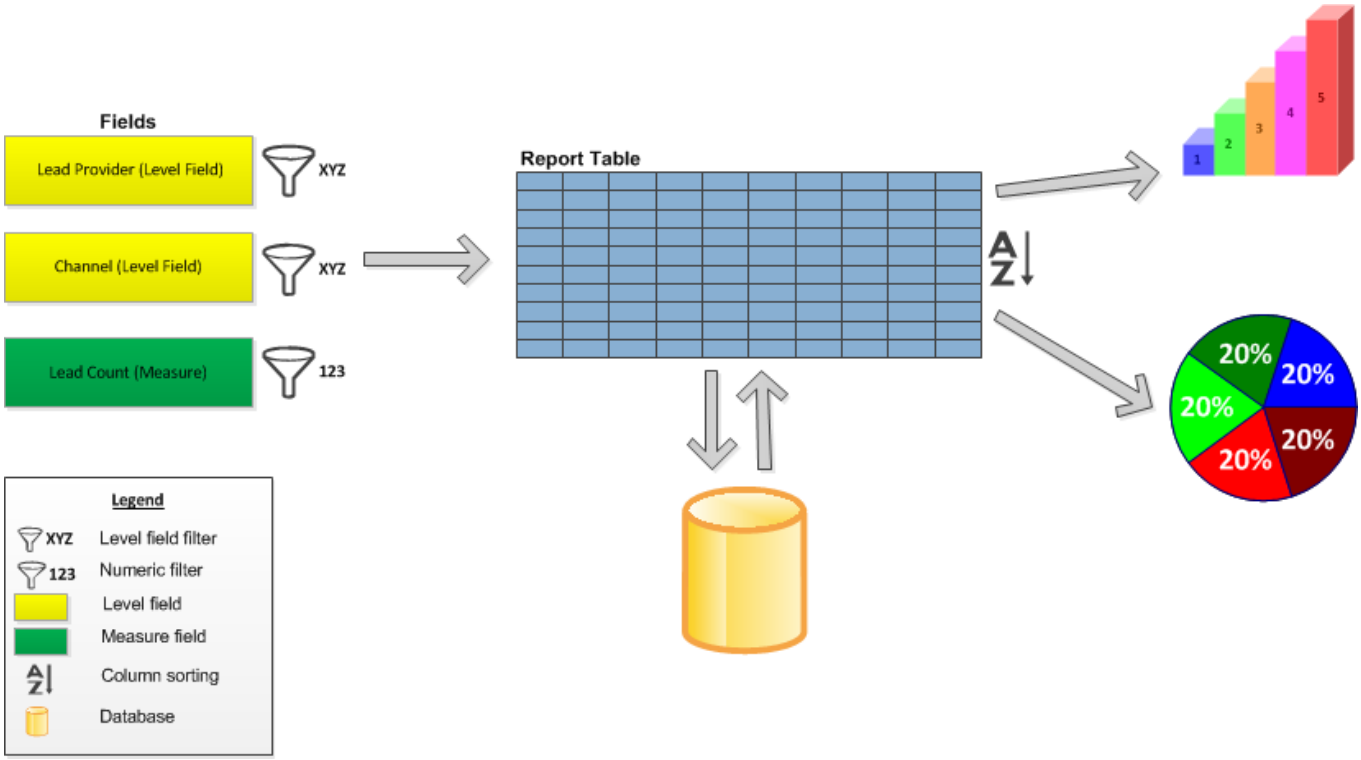
- The *Available Fields List* panel on the left hand side of the screen; shows the fields available for your report which you can add by dragging and dropping or double clicking.
- The *Layout* panel in the center of the screen; shows how the fields are arranged on the report and provides access to available properties based on the current display (e.g., table versus chart format).
- The report workspace on the right hand side of the screen; this is the report you have created based on the chosen fields and filters, and is displayed in your selected format (i.e., table or chart/graph format).
- The *Filter* panel at the top of the report, which shows all filters in use by the report and allows you to add, edit, or remove these filters.

At a high level, the steps involved in building a report are as follows:

1. Select your fields for a report and then add filters to narrow the data set (e.g., Lead Provider=x, y, z and Lead Count=greater than 25)
2. Create calculations such as ratios or percentages, as needed.
3. Generate/refresh the report to show the results.
4. Save the report.
5. Display the report as a graph format, as needed (e.g., line or bar graph).
6. Export the report to PDF, CSV, or Excel format, as needed.
7. Rename, assign an owner, delete, make searchable, and share the report from the *View Management* screen, as needed. The report is available as a "view" from this screen when you save it from the Analyzer Tool. For information on working with report views from the *View Management* screen, click here.

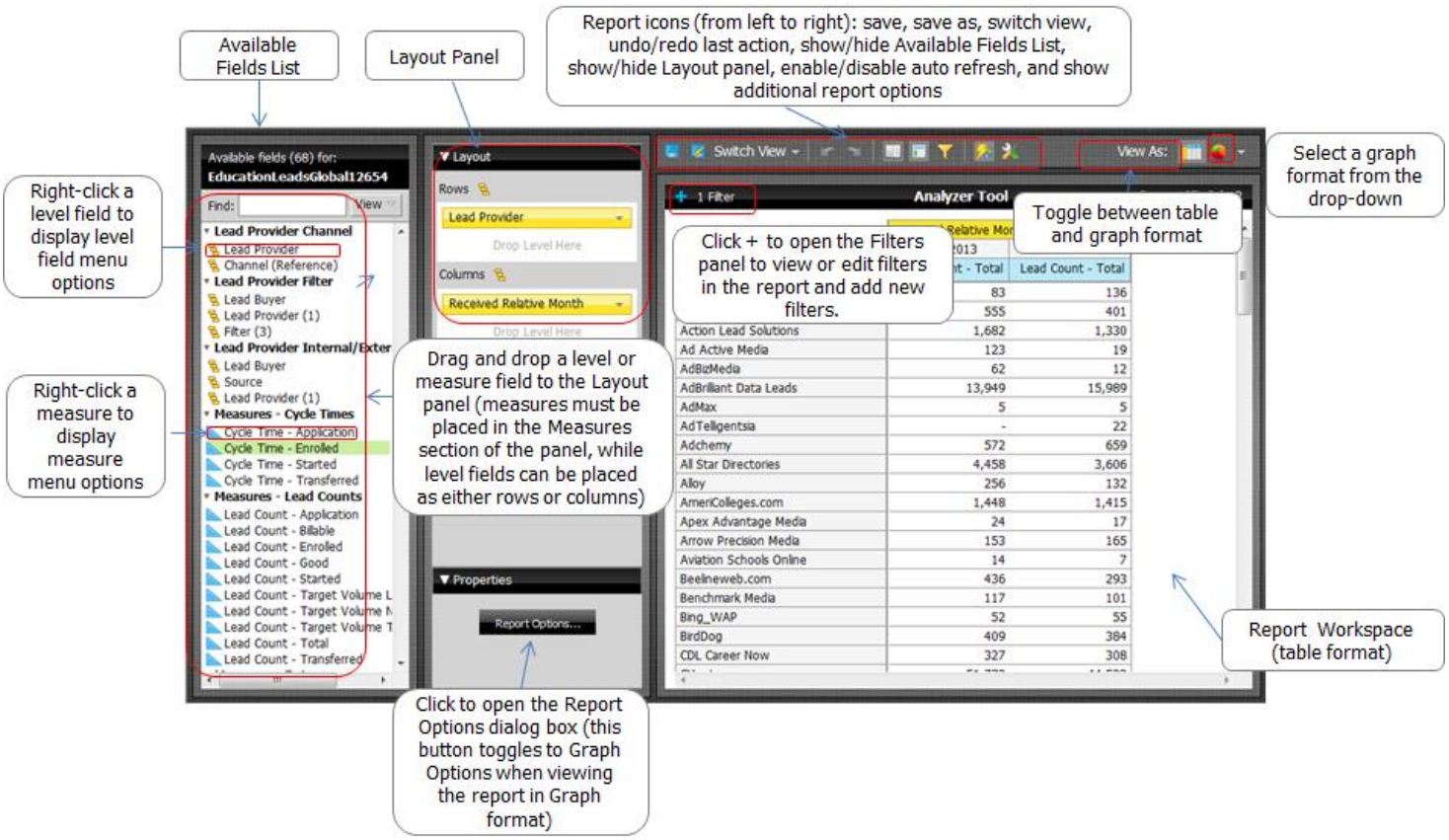
Analyzer Tool Concept Diagram

The following diagram shows how a report can be built in the Analyzer Tool using fields (i.e., level and measure fields) and filters (i.e., numeric and non-numeric). In the example below, the user selects two level fields for the report ("Lead Provider" and "Channel") and filters those fields to select only a sub-set of lead providers and channels. She also adds a measure field ("Lead Count") to the report, and adds a numeric filter to the measure so that only lead counts greater than 50 are included in the report. Once the fields and filters have been added to the report, she generates/refreshes the report to display the report table results (when the report is generated, the Analyzer Tool retrieves the necessary data from the database based on the chosen fields and filters). The user can sort the table as well as apply other formatting options (not shown in the diagram), as needed. In the example below, she elects to show the report in bar graph format, followed by pie chart format.



Analyzer Tool Application Diagram

The following diagram shows the main features of the Analyzer Tool:



Analyzer Tool Use Case Scenario

The following scenario describes how Mary, the Media Buyer at Edicus, could use the Analyzer Tool:

Mary decides to use the Analyzer Tool to analyze good lead counts for the top 20 lead providers for the year to date. She starts by selecting the "Lead Provider" level field from the *Available Fields List* panel and dropping it in the *Rows* section of the *Layout* panel, and then selects the "Received Year" level field and "Lead Count - Good" measure field and drops them in the *Columns* and *Measures* section respectively. Now that Mary has added her fields to the report (one measure field and two level fields), she is ready to add filtering to the fields. For the "Received Year" field, Mary adds a filter so that only results for 2013 will be included in the report, and then adds a filter to the "Lead Provider" field so that only 40 lead providers will be included in the results and creates a "Top Ten, Etc." numeric filter for the "Lead Count - Good" measure. For the latter, she specifies that the "Lead Provider" field should display only the top 20 lead providers by lead count. Once Mary adds these filters, she is ready to load the report by clicking Refresh Report and waiting for the report to generate. The report that Mary has created looks like this:

	Received Year
	2013
Lead Provider	Lead Count - Good
CUnet	195,898
AcademixDirect	103,216
Action Lead Solutions	57,681
Campus Explorer	45,031
AdBrilliant Data Leads	40,406
BirdDog	33,980
Ampush Media	32,126
All Star Directories	30,935
AmeriColleges.com	25,635
Adchemy	20,853
Avenue 100	18,445
Beelineweb.com	4,229
Action Based Media	4,147
Alloy	3,797
360 Education Solutions	3,317
Banner Edge Media	2,959
CUnet Audience Marketing - PPC	2,264
Cappex	1,940
Andrews Wharton, Inc	1,758
Allied Health Schools	1,618

After viewing the report, Mary decides to add an additional, custom field "Rank By" after which the report looks like this:

	Received Year	
	2013	
Lead Provider	Lead Count - Good	Rank by Lead Count - Good
CUnet	195,898	1
AcademixDirect	103,216	2
Action Lead Solutions	57,681	3
Campus Explorer	45,031	4
AdBrilliant Data Leads	40,406	5
BirdDog	33,980	6
Ampush Media	32,126	7
All Star Directories	30,935	8
AmeriColleges.com	25,635	9
Adchemy	20,853	10
Avenue 100	18,445	11
Beelineweb.com	4,229	12
Action Based Media	4,147	13
Alloy	3,797	14
360 Education Solutions	3,317	15
Banner Edge Media	2,959	16
CUnet Audience Marketing - PPC	2,264	17
Cappex	1,940	18
Andrews Wharton, Inc	1,758	19
Allied Health Schools	1,618	20

Now, she has a report that not only shows the top 20 performing lead providers by good lead count, but also ranks the lead providers in performing order.

Finally, Mary saves the report using a unique name and then exports it to PDF format so that she can distribute the report as needed. Because Mary has saved the report, she can also access the report view from the *View Management* screen, from where she can further rename, share, make searchable, delete, or assign ownership to the report.

About

Analyzer Tool Menus

The following menus and menu options are available from the report, each of which allows you to perform a specific action:

Available From ...	Access By ...	Menu Selection	Description
List of Available Fields panel	Right-click a field to display the menu.	Add to Report	Add the field to the report.
		Filter	Add a filter to the field.
		Tell me About ...	View information about the field.
Layout panel or Report (table format only)	Right-click a level field to display the menu.	Edit	Edit the level field's details.
		Also Show	View other level fields in the same hierarchy (e.g., Lead Provider > Channel)
		Show Properties	View member properties for the field, if available. This option can only be selected if the field contains member properties, otherwise it is grayed out.
		Hyperlink ...	This feature is not available in this beta release.
		Filter ...	Add a filter to the level field.
		Sort A > Z	Sort the selected row or column in ascending alphabetical order.
		Sort Z > A	Sort the selected row or column in descending alphabetical order.
		Show Subtotals	Shows subtotals for the level field. The subtotals that are displayed depend on the types of totals that have been selected for the measure field [see "Subtotals (Sums, Averages, etc.)" below]. Click here for more information on how grand totals and subtotals are displayed in a report.
		Tell me About ...	View information about the field.
		Remove from Report	Delete the field from the report.

Layout Panel or Report (table format only)	Right-click a measure field to display the menu.	Column Name and Format ...	Edit the column's name, number format and decimal places, and MDX expression.
		Conditional Formatting	Apply conditional formatting to the measure field values.
		User Defined Measure ...	Create a % of, Rank, Running Sum; Calculated; or Trend measure.
		Greater/Less Than, Equal To, Etc. ...	Add a Greater/Less Than, Equal to, Etc. numeric filter to the measure field.
		Top Ten, Etc. ...	Add a Top Ten, Etc. numeric filter to the measure field.
		Sort Values High > Low	Sort the measure values in ascending numeric value.
		Sort Values Low > High	Sort the measure values in descending numeric value.
		Subtotals (Sums, Averages, etc.)	Select which types of totals (i.e., aggregate, sum, minimum, maximum, and/or average) are displayed for the measure field. Click here for more information on how totals and subtotals are displayed in a report.
		Tell me About ...	View information about the field.
		Hide from Chart	Do not display the measure field in the graph format of the report (it will be shown in the report table only).
		Remove from Report	Delete the field from the report.
Report (table format only)	Right-click a level field value to display the menu.	Exclude	Exclude the selected value from the report (but include all other filtered values for the level field). This action gets applied to the report in table and graph format. When you update the filter as described, any filter that has already been assigned to the field will be overridden.
		Keep Only	Exclude all values for the level field except for the selected value. This action gets applied to the report in table and graph format. When you update the filter as described, any filter that has already been assigned to the field will be overridden.
		Show All	Display All values for the level field. This action gets applied to the report in table and graph format. When you update the filter as described, any filter that has already been assigned to the field will be overridden.
Report (graph format only)	Left-click a value on the graph to display the menu.	Keep Only	Exclude all values for the level field except for the selected value. This action gets applied to the report in table and graph format. When you update the filter as described, any filter that has already been assigned to the field will be overridden. This filter works on the level field that has been defined as the "series" for the graph.
		Exclude	Exclude the selected value from the report (but include all other filtered values for the level field). This action gets applied to the report in table and graph format. When you update the filter as described, any filter that has already been assigned to the field will be overridden.

			This filter works on the level field that has been defined as the "series" for the graph.
		Clear Selections	Clear any "keep only" or "exclude" filtering that has been applied to the field.

Analyzer Tool Icons

The following icons are available from the report, each which allows you to perform a specific action:

Icon	Description
	Click to save the report. If you already saved the report, the report is saved using the assigned report name. If you have not already saved the report and/or if the report has been saved by another user, the *Save View* dialog box is displayed from where you can save the report using a new name.
	Click to save the report using a new name. From the *Save View* dialog box that is displayed, you can assign a name to the report.
	Click the down arrow and select the view you want to toggle to. Depending on the view you are already in, you can choose to switch to the (basic) Analyzer View or the Advanced Analyzer View, as well as any report that you have already generated and saved.
	Click to undo the last action.
	Click to redo the last action.
	Click to toggle between hiding and showing the *Available Fields List* panel. By default, the list is displayed. From the *Available Fields List* panel, you can view additional information about each field and add fields to the report.
	Click to toggle between hiding and showing the *Layout* panel. By default, the panel is displayed. When the report is in table format, the *Layout* panel shows the "Rows, Columns, and Measures" criteria for the report. From the panel, you can add, edit, and remove fields as well as access the *Report Options* dialog box for additional report table formatting options. When the report is in graph format, the *Layout* panel shows the "X Axis", "Series/Color Stack" (depending on the type of graph you are viewing), "Measures", and "Multi Chart" criteria for the report. From the panel, you can add, edit, and remove fields as well as access the *Chart Options* dialog box for additional graph formatting options.
	Click to toggle between hiding and showing the *Filters* panel, which shows all filters in use by the report. By default, the panel is hidden. From the *Filters* panel, you can add, edit, and remove filters as well as view filters that are in use by the report.
	Click to toggle between enabling and disabling auto refresh. By default, auto refresh is disabled. Auto refresh automatically reloads the report when configuration changes have been made.
	Click to open a menu showing additional actions available for the report, such as exporting (to PDF, Excel, CSV), viewing "about" information for the report such as description, created and modified date, accessing the *Report Options* dialog box (see *Report Formatting*), accessing the *Chart Options* dialog box (see *Report Formatting*), resetting the report to its original state, and reverting columns sizes to their previous state.
	Click to view the report in table format.
	Click to view the report in graph format (as the last selected graph type). Click the down arrow to display a list of graph types that you can apply to the report.

Analyzer Tool Hot Keys (Shortcuts)

Hot keys are keyboard shortcuts which help you work more efficiently. You can use hot keys to conduct many of the most common actions. In most cases, the hot key is indicated on the menu item or as a tool tip when hovering over the button. The following table describes the hot keys that are available from the Analyzer Tool:

Page/Element	Action	Hot Key
Report View Page	Show/Hide the *Available Fields List* panel	Ctrl + Alt + F
Report View Page	Show/Hide the *Filters* panel	Ctrl + Alt + T
Report View Page	Show/Hide the *Layout* panel	Ctrl + Alt + Y
Report View Page	Toggle between table format and the default chart format	Ctrl + Alt + C
Report View Page	Reset the report	Ctrl + Q

Report View Page	Undo the last action in the Analyzer Tool	Ctrl + Z
Report View Page	Redo the last action in the Analyzer Tool	Ctrl + Y

Report Fields

Level and measure fields define the content of your report and are color coded by type in both the report and the *Available Fields List* panel. Level fields (e.g., "Lead Provider" and "Application Relative Month") are orange while measure fields (e.g., "Lead Count") are blue. Although you can create a report without knowledge of field types, knowing how field types work can help you understand how different charts display data and how filters work together in a report. While level fields are often text based, measure fields are numeric and usually represent business metrics such as lead counts. In addition, measure fields are designed for summing, dividing, creating averages, etc.

To view the list of fields that are available when you build a report, toggle the "Show List of Available Fields" icon to display the *Available Fields List* panel. You can organize the list of fields (via the *View* drop-down) by category (default), type (i.e., measure fields and then level fields are shown), alphabetically, or by schema. If you cannot locate a field, you can search for the field by typing the first character(s) of the field name into the *Find* field of the *Available Fields List* panel; the list automatically updates to reflect your search criteria.

Adding, Removing, and Renaming Fields

You can add a field to a report from the *Available Fields List* panel in one of three ways: by selecting the field and dragging it to the *Layout* panel, double-clicking the field, or right-clicking the field and selecting Add to Report. If a field that has been added to the report belongs to an hierarchy, you can access related fields by right-clicking the field from the *Layout* panel and selecting Also Show from the menu.

Once you have added fields to your report, you can rearrange them as required. From a report in table format, you would simply drag the field to the new location (measure fields, in blue, will always be placed on the right side of a table) while, from chart format, you would drag the field from the *Layout* panel between the different "zones" (e.g., "X Axis", "Series", "Measures", etc.). Note, however, that you can only move a field within zones of the same color as the field (i.e., blue for measure fields and orange for level fields). Conversely, to remove a field from a report you can drag the field to the lower right corner of the screen (a trash can icon will appear) or right-click the field and select Remove from the Report from the menu.

To rename a field, right-click the field from the *Layout* panel, click Edit, and type the new name into the *Name* field. You can also provide a plural version of the field name from the *Plural Name* field, in which case the plural name would be automatically applied to the field when the plural form is grammatically correct (i.e., when the field name applies to a plural value such as "Dispositions" rather than "Disposition"). Renaming a field only impacts the report and you can always find the original name by viewing the definition of the field (by right-clicking the field and selecting Tell Me About ...), which shows the name, field type, and description of the field.

Field Hierarchies

Some level fields (for example, "Program") belong to pre-configured field hierarchies which make it easier to drill down to view detailed data from a report. When creating a filter, field hierarchies narrow the list of available values because it is limited to other fields in the hierarchy. Further, field hierarchies can control how fields are placed on a report. For example, because fields from the same field hierarchy should be placed on the same axis (row/column), the report will automatically enforce this rule as you move and arrange your fields.

Note: The "drill down" feature is not available in the current version of the Analyzer Tool.

To view a field's hierarchy, from the *Layout* panel right-click a level field and select Also Show from the menu (this option is only active if the field is part of an hierarchy); all associated fields in the hierarchy are displayed from a sub menu for easy selection. Simply select one of these fields to add it to the report. Alternately, from the report you can double-click a value from the parent level field (e.g., from the "Lead Provider" field/column, double-click "A-Z Leads") to add the child property to the report (e.g., add the "Channel" field to the report).

Note: If you view the *Available Fields List* panel by "category", fields will be shown in their pre-defined groupings and therefore displayed with other fields in their hierarchy.

Some examples of field hierarchies are:

- Requested Program School Name > Program Group > Program
- Call Center Disposition Lead Buyer Name > Parent Disposition > Disposition
- Lead Provider > Channel
- Requested Lead Buyer > Division > School > Campus

Field Properties

Similarly, certain fields are pre-configured to contain member properties. If a level field has a number in parenthesis next to it in the *Available Fields List* panel, it contains associated member properties. If you right-click the field from the *Layout* panel and select Show Properties, you can view its list of properties; select each property that you want to include in the report (if a property/field is already selected and you want to remove it from the report, select the property/field again to clear the check box).

When a member property is added to a report, it is shown in light pink and the actions that can be performed on it are limited to viewing information about the property or removing it from the report (by right-clicking the property and selecting Tell Me About or Remove from Report, respectively). Thus, although a field's member properties can be displayed from the report to show additional, related information for a field, a property cannot be filtered, renamed, etc. as the field can.

Managing Fields in Large Reports

Although you can add fields with an arbitrary number of values, large reports will be truncated. Truncated table reports differ from full reports as follows:

- The report "status bar" displays the number of rows and columns that are shown versus the number of rows and columns in the full report. Cells are truncated until the number of cells is less than or equal to 2000 (this limit can be increased by a Sparkroom Administrator). Rows are truncated first (to a minimum of ten rows), followed by columns. This logic ensures that the report still displays a good sample of the row values despite the truncation.
- Subtotals and grand totals are not displayed unless all participating data is displayed.
- A message at the end of the report informs you that the report has been truncated.

  Note: The data in the cells does not change because of truncation.

- For charts, there is a maximum number of plot points that can be displayed on any axis. This limit depends on the type of chart and is based on the amount of data that can reasonably fit on a screen. The limit can be changed via the *Chart Options* dialog box (by specifying the domain limit from the *Other* tab).

Report Filters

Filters (level field or numeric filters) are used to restrict data that is presented in a report. You can view which filters have been applied to a report via the "Filters" icon which toggles between showing and hiding the *Filters* panel or, alternately, you can expand the *Filters* panel by clicking +.

Because a filter always acts on a field, the first step to creating a filter is to select the field and then choose the value(s) that you want to include or exclude. You can add a filter by right-clicking a field in the report and selecting Filter from the menu, dragging the field you want to filter from the *Available Fields List* panel to the *Filter* panel, or right-clicking the field from the *Available Fields List* panel and selecting Filter from the menu. The first option assumes that the field you are filtering has already been added to the report while the last two options assume that the field has not yet been added to the report.

The following types of filters are available for a report:

- **Level field filter**: Level fields contain non-numeric information, so you can include or exclude specific values as required. Disposition is an example of a level field, whereby you may want to filter the field to only show "Invalid Phone Number" and "Appointment Set", for example.

  For level field filters, you can either select from a list of values (i.e., by excluding or including pre-configured values) or match part of a string (i.e., by typing the string which the name "contains" or "does not contain"). Typically, the list of possible values contains all available values but sometimes the list is narrowed because a filter has been placed on another field that is part of the same field hierarchy. This makes it easier to browse only values that are relevant or related to one another. Similarly, when you filter date-related fields, you can select from a list of month/year combinations by excluding or including these pre-configured values.

  In addition, you can filter a level field using the "exclude" or "keep" short cut. When you right-click a level field value, a short cut menu is displayed from which you can choose to exclude that value, exclude all values other than the selected value, or include all available values for the field. For example, if you right-click the lead provider A-Z Leads for the "Lead Provider" level field, you can exclude A-Z Leads from the report, exclude all lead providers except A-Z Leads, or include all lead providers. Once you refresh the report, the report and *Filter* panel are updated with the results.

In the following example, a report has been created with no filters added:

	Application Relative Month							
	October 2012	November 2012	December 2012	January 2013	February 2013	March 2013	April 2013	May 2013
Lead Provider	Lead Count	Lead Count	Lead Count	Lead Count	Lead Count	Lead Count	Lead Count	Lead Count
AcademixDirect	476	424	583	568	477	428	338	200
Geary Interactive	22	15	63	30	14	19	18	10
360 Education Solutions	9	15	14	17	9	13	16	10
First Impression	13	3	43	10	8	10	5	6
Accelerex	4	1	5	5	6	5	1	5

Now, a filter has been applied to the "Application Relative Month" level field so that only months in 2013 are included in the report:

	Application Relative Month				
	January 2013	February 2013	March 2013	April 2013	May 2013
Lead Provider	Lead Count	Lead Count	Lead Count	Lead Count	Lead Count
AcademixDirect	568	477	428	338	200
Geary Interactive	30	14	19	18	10
360 Education Solutions	17	9	13	16	10
First Impression	10	8	10	5	6
Accelerex	5	6	5	1	5

Finally, another filter is applied (to the "Lead Provider" field) whereby only three out of five lead providers are selected:

	Application Relative Month				
	January 2013	February 2013	March 2013	April 2013	May 2013
Lead Provider	Lead Count	Lead Count	Lead Count	Lead Count	Lead Count
AcademixDirect	568	477	428	338	200
Geary Interactive	30	14	19	18	10
First Impression	10	8	10	5	6

- **Numeric filter (measures)**: While measure fields contain numeric information for a specific level field (e.g., you may create a report using the "Lead Count" measure and the "Lead Provider" level field to show lead counts by lead provider), once you add a measure to the report you can choose to apply a numeric filter to further filter the measure results. From the *Layout* panel or the report, right-click the measure and then select Greater/Less Than, Equal To, Etc. or Top 10, etc. from the menu depending on the type of filter you want to create. Either of these menu selections will display the *Numeric Filter* dialog box, although your menu selection determines which check box is selected by default (i.e., Greater/Less Than, Equal To, Etc. or Top Ten, etc.).

  From the *Numeric Filter* dialog box, you would select the level field you want to apply the filter to (e.g., Lead Provider) and the type of filter you are creating. For Greater/Less Than, Equal To, Etc., select the check box (if it is not already selected), select the measure from the drop-down (you can select any measure from the list, even if the measure has not been added to the report), the operation (e.g., greater than, less than, equal to, etc.) and provide a value for the operation (e.g., greater than "10"). For example, if you create a numeric filter for the "Lead Count" measure and apply it to "Lead Provider", whereby the criteria specified is "lead count - started", "greater than", and "25", the report would only show lead providers on the report whose "lead count - started" (i.e., the number of inquiries which were converted to "starts") exceeded 25. Any lead provider that did not meet this criteria would be "filtered out" of the report (once you remove the filter, the report would again display the full lead provider list). Although you can only create one condition per measure, you could include multiple conditions for the filter; in this case, the filters are applied to the respective measure(s) in order.

  For a Top Ten filter, on the other hand, after selecting the level field you want to apply the filter to (i.e., Lead Provider), select the *Top Ten, Etc.* check box, Top or Bottom (to show the top x values or bottom x values), the value (e.g., "5"), and the measure (you can select any measure from the list, even if the measure has not been added to the report). For example, you may want to show the top ten lead providers by "lead count - started" in which case the report will display the lead providers whose "lead count - started" statistics are in the top ten. You can only create a Top Ten condition for a single measure and cannot apply multiple Top Ten conditions to a field.

  Note: If you filter by a Greater Than/Less Than component and a Top 10 component, the former will be applied first.

  Note: To remove a numeric filter from a measure field, right-click the measure and, from the *Numeric Filter* dialog box, clear the Greater/Less Than and/or Top Ten check box.

The following example shows a report with no numeric filters applied:

	Application Relative Month				
	January 2013	February 2013	March 2013	April 2013	May 2013
Lead Provider	Lead Count	Lead Count	Lead Count	Lead Count	Lead Count
360 Education Solutions	17	9	13	16	10
AcademixDirect	568	477	428	338	200
Accelerex	5	6	5	1	5

Now, a numeric filter with a Greater/Less Than component has been applied to the above report, whereby only lead providers with lead counts greater than 30 (total) are included:

	Application Relative Month				
	January 2013	February 2013	March 2013	April 2013	May 2013
Lead Provider	Lead Count	Lead Count	Lead Count	Lead Count	Lead Count
360 Education Solutions	17	9	13	16	10
AcademixDirect	568	477	428	338	200

Finally, a Top Ten component is added to the report whereby only the top performing lead provider by lead count is shown:

	Application Relative Month				
	January 2013	February 2013	March 2013	April 2013	May 2013
Lead Provider	Lead Count	Lead Count	Lead Count	Lead Count	Lead Count
AcademixDirect	568	477	428	338	200

In addition, note the following about numeric filters:

- A report can include only one numeric filter at a time.
- When the report is generated, the numeric filter is applied after other filters are applied.
- If you remove the level field from the report, the numeric filter is also removed.
- You cannot apply a numeric filter to a calculated field (i.e., summary metric) such as % of, Rank, Running Sum, etc. If you do so, when you refresh the report, the following message will be displayed:

  "A numeric filter (e.g. Top 10, Greater/Less than) cannot be applied to a summary metric: % of, Rank, Running sum etc. The measure you are attempting to filter includes a summary metric as part of its formula. The filter will be removed."

Report Calculations and Totals

Once you add fields and filters to your report, you can calculate and manipulate data on your report as follows:

- Change how totals are displayed (e.g., display totals as averages).
- Add new fields that originate from existing fields (e.g., based on the field "Lead Count", you create the field "% of Lead Count").
- Create new numbers on the fly.

Displaying Totals as Averages, Max, Min, etc.

As described below, you can specify how you want the report to display totals for rows/columns. Once you (1) select the types of totals that the report can display by selecting each type from the *Average, Min, Max, Etc.* dialog box, you would then (2) select whether you want to show grand totals for report columns and/or rows and (3) indicate if you want to show subtotals for level field(s) in the report. These options are described below:

1. Right-click the measure field (e.g., "Lead Count") and select Subtotals (Sums, Averages, etc.) from the menu. The *Average, Min, Max, Etc.* dialog box is displayed, allowing you to select how the report will summarize data for that field. You can choose to show grand totals and/or subtotals (depending on your selections in 2 and 3 below) as follows:

   - *Aggregate*: Shows the total sum. This is selected by default and is displayed as "Total" in the report table. This function summarizes based on the aggregator of the measure (in most cases, a measure's inherent aggregator is "sum"; therefore, "aggregate" and "sum" below will typically be the same for a report).

- *Sum*: Shows the total sum.
- *Average*: Shows the average of the values.
- *Max*: Shows the highest value.
- *Min*: Shows the lowest value.

2. Via the *Report Options* dialog box, enable or disable the report to display grand totals for rows and columns via the *Show Grand Totals for Rows* and *Show Grand Totals for Columns* check boxes. If selected, "grand total" column(s)/row(s) will be added to the report based on your selection(s) in 1 above. By default, grand totals are shown in reports.

3. Right-click the level field you want to show subtotals for and select Show Subtotals. [This option is only available for rows or columns which contain multiple level fields (and is not available for the last field of the report column or row). If selected, "subtotal" column(s)/row(s) will be added to the report based on your selection(s) in 1 above.

Creating New Measures

% of, Rank, Running Sum, or % of Running Sum Measures

To display the % of, Rank, Running Sum, etc. option, right-click a field on the report and, from the short cut menu, select User Defined Measure and then % of, Rank, Running Sum, etc. From the dialog box, you can select the type of measure field you want to create [i.e., % of <measure>, Rank by <measure>, Running Sum of <measure>, or % of Running Sum of <measure>]. When you click Next, you are taken to another dialog box from where you can specify the field name, format (this value defaults to the appropriate selection based on the type of measure field you are creating; e.g., if you selected % of <measure> the format would default to "percentage" since the application assumes you want to display the field as a percentage), number of decimal places, and additional options based on the type of measure field you are creating. The following table describes the options for each type of measure field (click here for example of each option):

Measure Field	Description	Default Number Format	Total Option	Description
% of <measure>	The % of <measure> (e.g., "% of Lead Count") column is added to the report which shows the percentage of each measure field value (how percentages are calculated depend on the option selected for the measure; see the *Total Options* column in this table).	Percentage	Column (the Grand Total Column is 100%)	This option calculates the percentages based on the measure values in the same column.
			Row (Grand Total Row is 100%)	This option calculates the percentages based on the measure values in the same row.
			Grand Total (Table Grand Total is 100%)	This option calculates the percentages based on the measure values in the entire table.
			Each x Column/Row Subtotal	This option is only available if you have multiple level fields on the report. You can select whether percentages will be calculated with a level field.
Rank by <measure>	The Rank by <measure> (e.g., "Rank by Lead Count") column is added to the report which shows the rank of each measure field value (how ranks are calculated depend on the option selected for the measure; see the *Total Options* column in this table).	General Number	Rank Across Rows	This option calculates rank based on the measure values in a column across all rows.
			Rank Across Columns	This option calculates rank based on the measure values in a row across all columns.
			Rank Within	This option is only available if you have multiple level fields in the report. You can select whether ranking will be calculated within a level field.
Running Sum of	The Running Sum of <measure> (e.g., "Running	Default	Sum Across All Rows	This option calculates the running sum of the measure

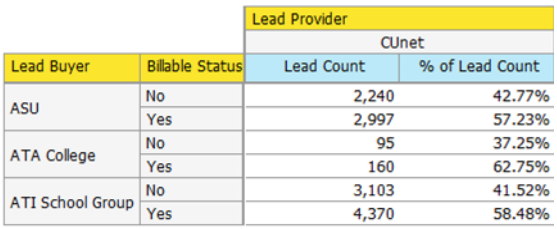
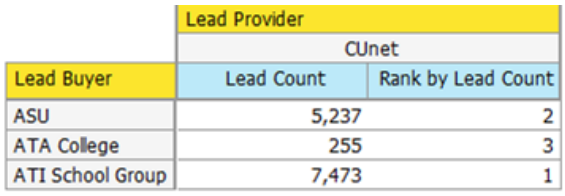
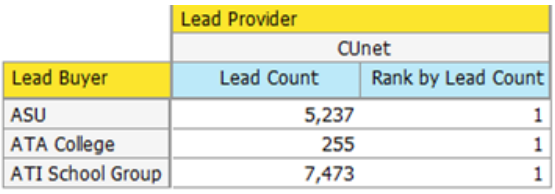
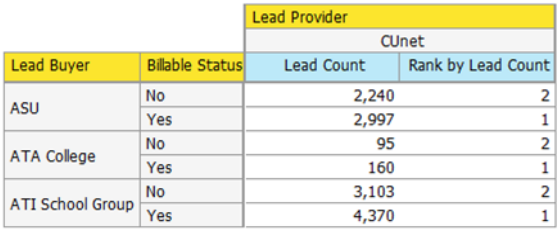
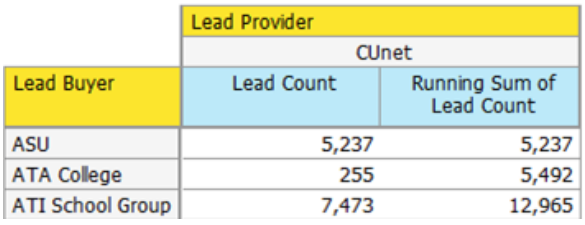
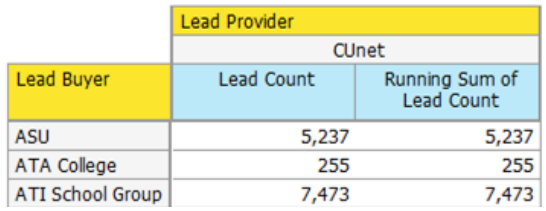
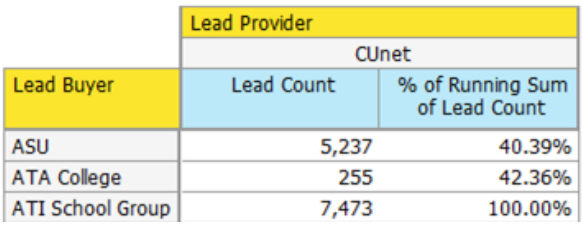
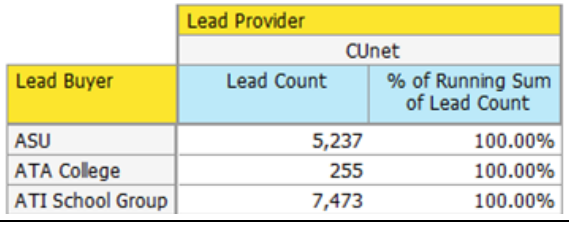
Measure Field	Description	Default Number Format	Total Option	Description
<measure>	Sum of Lead Count") column is added to the report which shows the running sum of the measure field (how the sums are calculated depend on the option selected for the measure; see the *Total Options* column in this table).			field in a column across all rows.
			Sum Across All Columns	This option calculates the running sum of the measure field in a row across all columns.
			Break By	This option is only available if you have multiple level fields in the report. You can select whether running sums will be sub totaled within the level field.
% of Running Sum of <measure>	The % of Running Sum of <measure> (e.g., "% of Running Sum of Lead Count") column is added to the report which shows the percentage (of the running sum) of each measure field value (how the percentages are calculated depend on the option selected for the measure; see the *Total Options* column in this table).	Percentage	Sum Across All Rows	This option calculates the running sum percentage of the measure field in a column across all rows.
			Sum Across All Columns	This option calculates the running sum percentage of the measure field in a row across all columns.
			Break By	This option is only available if you have multiple level fields in the report. You can select whether running sum percentages will be sub totaled within a level field.

Once you have configured your measure field, a new field will be displayed on your report which behaves similar to other fields but with the following differences:

- You cannot filter based on this field
- You cannot create another field based on this field

The following table shows an example of each option that is available for a measure field (per above):

Measure	Option	Example
% of <measure>	Column (Grand Total Column is 100%)	Lead Provider / CUnet Lead Buyer: Lead Count, % of Lead Count ASU: 5,237, 40.39% ATA College: 255, 1.97% ATI School Group: 7,473, 57.64%
	Row (Grand Total Row is 100%)	Lead Provider / CUnet Lead Buyer: Lead Count, % of Lead Count ASU: 5,237, 100.00% ATA College: 255, 100.00% ATI School Group: 7,473, 100.00%
	Grand Total (Table Grand Total is 100%)	Lead Provider / CUnet Lead Buyer: Lead Count, % of Lead Count ASU: 5,237, 40.39% ATA College: 255, 1.97% ATI School Group: 7,473, 57.64%

Measure	Option	Example
	Each x Column/Row Subtotal	
Rank by <measure>	Rank Across Rows	
	Rank Across Columns	
	Rank Within	
Running Sum of <measure>	Sum Across Rows	
	Sum Across Columns	
	Break By	
% of Running Sum of <measure>	Sum Across All Rows	
	Sum Across Columns	

		Lead Provider	
		CUnet	
Lead Buyer	Billable Status	Lead Count	% of Lead Count
ASU	No	2,240	42.77%
	Yes	2,997	57.23%
ATA College	No	95	37.25%
	Yes	160	62.75%
ATI School Group	No	3,103	41.52%
	Yes	4,370	58.48%

	Lead Provider	
	CUnet	
Lead Buyer	Lead Count	Rank by Lead Count
ASU	5,237	2
ATA College	255	3
ATI School Group	7,473	1

	Lead Provider	
	CUnet	
Lead Buyer	Lead Count	Rank by Lead Count
ASU	5,237	1
ATA College	255	1
ATI School Group	7,473	1

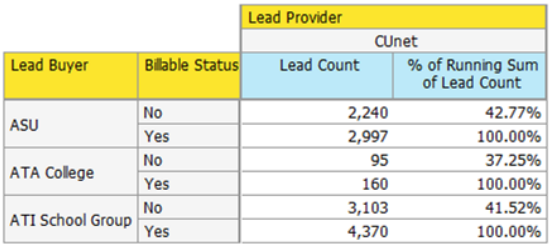
		Lead Provider	
		CUnet	
Lead Buyer	Billable Status	Lead Count	Rank by Lead Count
ASU	No	2,240	2
	Yes	2,997	1
ATA College	No	95	2
	Yes	160	1
ATI School Group	No	3,103	2
	Yes	4,370	1

	Lead Provider	
	CUnet	
Lead Buyer	Lead Count	Running Sum of Lead Count
ASU	5,237	5,237
ATA College	255	5,492
ATI School Group	7,473	12,965

	Lead Provider	
	CUnet	
Lead Buyer	Lead Count	Running Sum of Lead Count
ASU	5,237	5,237
ATA College	255	255
ATI School Group	7,473	7,473

	Lead Provider	
	CUnet	
Lead Buyer	Lead Count	% of Running Sum of Lead Count
ASU	5,237	40.39%
ATA College	255	42.36%
ATI School Group	7,473	100.00%

	Lead Provider	
	CUnet	
Lead Buyer	Lead Count	% of Running Sum of Lead Count
ASU	5,237	100.00%
ATA College	255	100.00%
ATI School Group	7,473	100.00%

Measure	Option	Example
	Break By	

		Lead Provider	
		CUnet	
Lead Buyer	Billable Status	Lead Count	% of Running Sum of Lead Count
ASU	No	2,240	42.77%
	Yes	2,997	100.00%
ATA College	No	95	37.25%
	Yes	160	100.00%
ATI School Group	No	3,103	41.52%
	Yes	4,370	100.00%

Calculated Measures

Calculated measures provide you with the flexibility to define a specific type of calculation based on the measure fields available to you (e.g., Lead Count, Cycle Time - Started, Cycle Time - Enrolled, etc.), using a selection of operators such as -, +, /, *, (, and). To create a calculated measure, right-click the column header of a measure in your report (or right-click the measure from the *Layout* panel) and select User Defined Measure > Calculated Measure ... This takes you to the *New Calculated Measure* dialog box, from where you can provide a name, select the format from the metric list (i.e., default, general number, currency, percentage, or expression) as well as the number of decimal places to display for the value, and then select the measure(s) you want to use in the calculation and connect each measure with the required operator.

If you select "Expression" as your measure format, the measure can be based on any valid MDX expression that evaluates to a calculated member. Advanced expressions will reference other dimensions via the dimension's MDX name. To find the MDX name, right-click any field and select Tell me about... Using MDX expressions, you can pin measures to specific members of a dimension, generate level based measures using "ancestor" or "parent" MDX functions, or perform if-else conditional logic using "if" or "case" MDX functions.

Note: Creating a measure using an MDX expression is intended for developers only and requires advanced knowledge of MDX expressions.

If you select the *Calculate Subtotals Using Measures Formula* check box, subtotals will be calculated by computing the result of the formula with the base number's subtotals. Clearing this check box allows the subtotals to be computed as a summary of the calculated number's different values. These two subtotal approaches are demonstrated in the following table:

Subtotal Option	Column X	Column Y	Calculated Column X/Y
Check box is not selected (i.e., the subtotal calculation does not use the formula)	X1	Y1	X1/Y1
	X2	Y2	X2/Y2
	Subtotal (X1,X2)	Subtotal (Y1,Y2)	Subtotal (X1/Y1,X2/Y2)
Check box selected (i.e., the subtotal calculation uses the formula)	X1	Y1	X1/Y1
	X2	Y2	X2/Y2
	Subtotal (X1,X2)	Subtotal (Y1,Y2)	Subtotal (X1,X2)/Subtotal (Y1/Y2)

Trend Measures

Trend measures allow you to create new measures based on an existing measure and time period (i.e., year, month, or day) field, enabling you to view trends between time periods such as percentage changes, deltas, or averages. For example, if you created a trend measure from the "Lead Count" measure and used the field "Application Relative Month" as your time period, you could compare the percentage difference of lead counts between months. To create a trend measure, right-click the measure you want to base the new measure on; the *New Trend Measure* dialog box is displayed. You can provide a name for the new measure, select the period type (e.g., "Application Relative Month"; the time period field must already be added to the report to appear from the *Period Type* drop-down), type of trend (e.g., value of previous period, average of previous periods, etc.), and the number of periods (this value is not used for all types of trends but must be completed regardless). In the following example, the "Lead Count Trend" measure has been created for the "Application Relative Month" time period. Because the trend type selected is "show value from previous period", the trend measure shows the last period's lead count value (although the time period starts at January 2013 in the report, the "Lead Count Trend" value will still show the lead count from December 2012):

	Application Relative Month							
	January 2013		February 2013		March 2013		April 2013	
Lead Provider	Lead Count	Lead Count Trend	Lead Count	Lead Count Trend	Lead Count	Lead Count Trend	Lead Count	Lead Count Trend
360 Education Solutions	17	9	9	15	13	14	16	17
Geary Interactive	30	22	14	15	19	63	18	30
Grad Schools	5	13	-	6	-	-	1	5

Report Layouts (Tables and Charts)

There are two types of layouts available for a report: table format and graph format. You can toggle between showing a report as a table and as a graph, but you cannot show both formats at the same time. Actions that you perform in one format (e.g., adding and removing fields and filters) will also affect the other format. To switch report formats, you can use one of the following methods:

- Click the down arrow beside the chart icon (from the upper right corner of the report: ) and select a chart format from the menu.
- Click the "View as Chart" () or "View as Table" icon () to toggle between the table format and the default chart format.

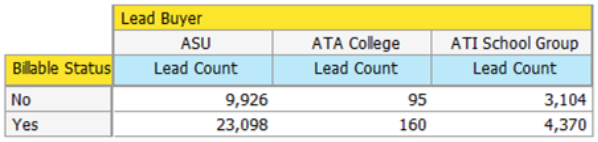
Note: Depending on the current format of the report, only one of the above icons is available at a time.

When you display your report in graph format, the *Layout* panel is updated to reflect a graph configuration. For instance, instead of the *Layout* panel showing "Rows", "Columns", and "Measures" as your layout options (as well as *Report Options* under *Properties*), it shows "X-Axis", "Series", "Measures", and "Multi-Chart" (and "Graph Options" under *Properties*). Based on the configuration you selected for your report table, the X-Axis shows your Row selection(s) and the Series shows your Column selection(s). If you added a level field to the "Multi Chart" layout option while in graph mode, when you return to report format the level field would be displayed as an additional column from the "Column" section. The "Multi-Chart" layout allows you to display individual graphs based on the level field that you apply to the "Multi-Chart" section; a separate graph is shown for each value available from the level field. For example, if you select the field "Country", when you refresh your report data a graph is displayed for each country from the "Country" field, allowing you to view summarized data per country.

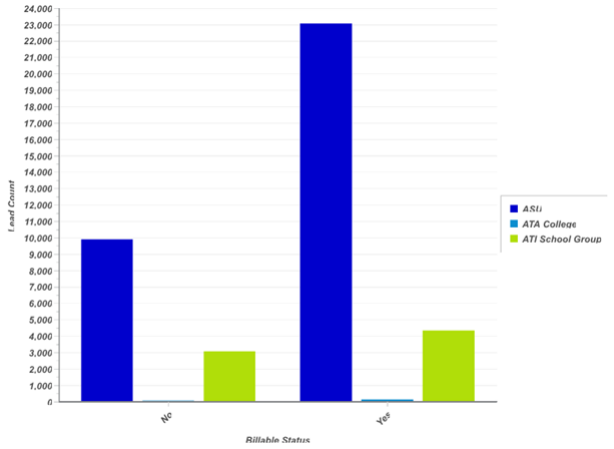
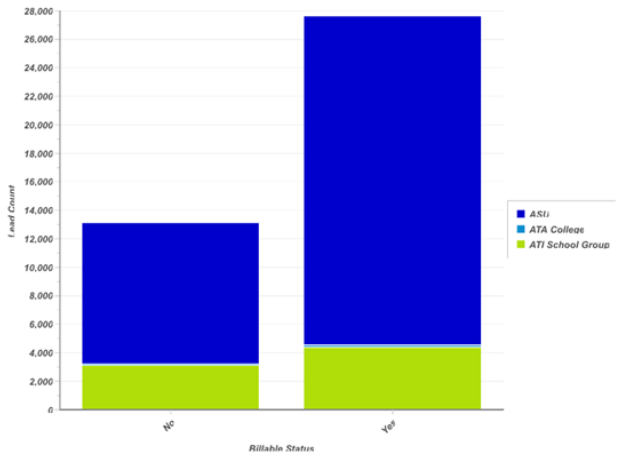
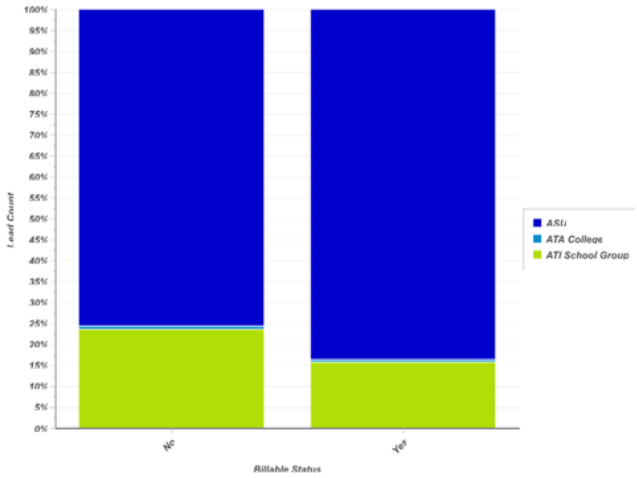
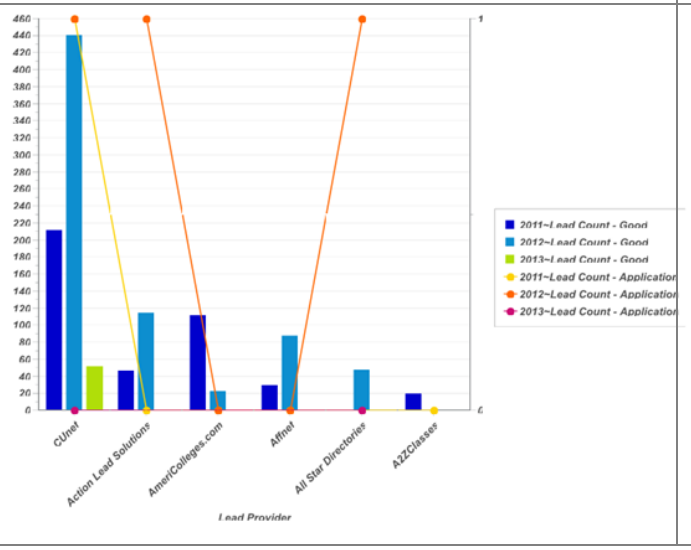
When you present report data using a chart (e.g., line chart), you have the option to display only the most important measure field(s) to avoid cluttering the chart while still being able to return to the table format to get the exact numbers and view additional measure fields. You can hide measure fields from a chart as follows:

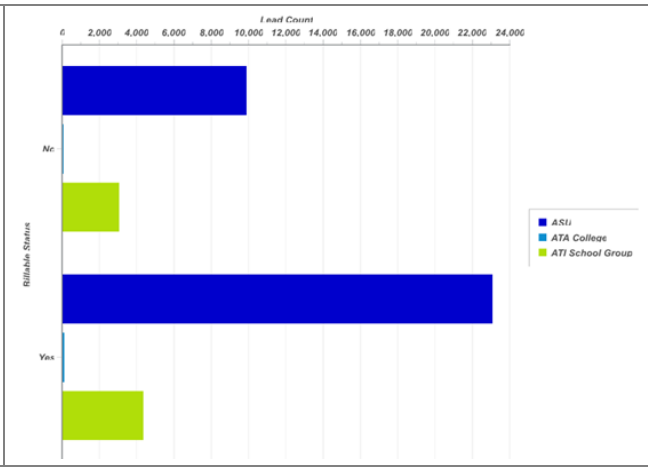
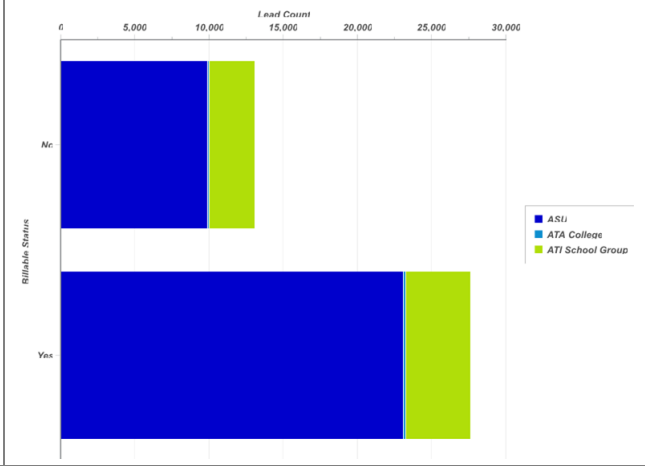
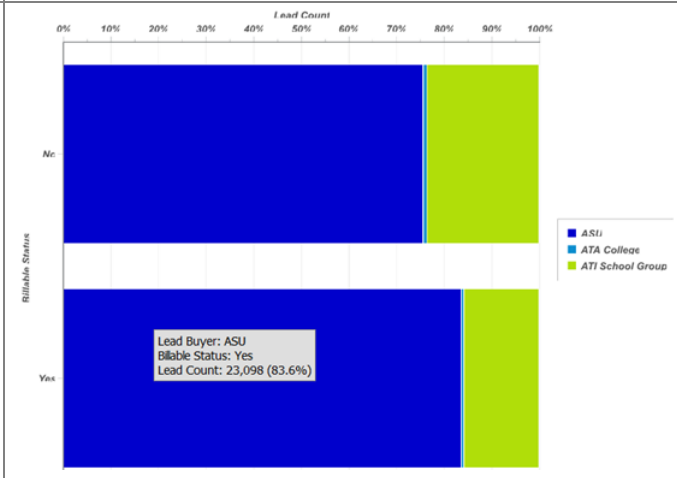
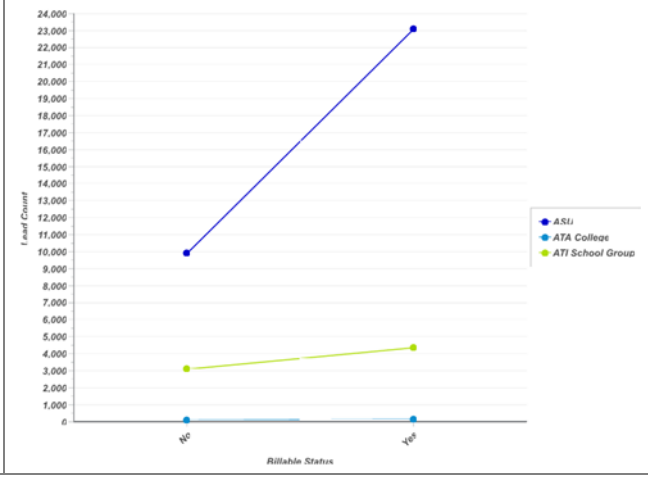
- If you are viewing the report in table format, from the *Layout* panel or the report, right-click the field you want to hide from the graph and select "Hide from Chart" (this menu option toggles between "Hide from Chart" and "Show on Chart").
- If you viewing the report in chart format, from the *Layout* panel right-click the field and select "Show on Chart" from the menu (this menu option toggles between "Hide from Chart" and "Show on Chart"). From the *Layout* panel, fields that are currently hidden are not displayed - to return to the table format, right-click the field, and select "Show on Chart" to show the field again.

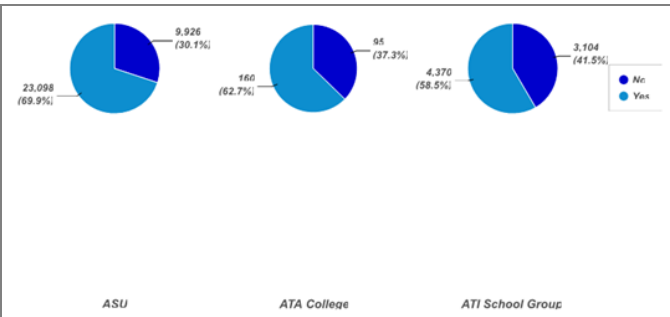
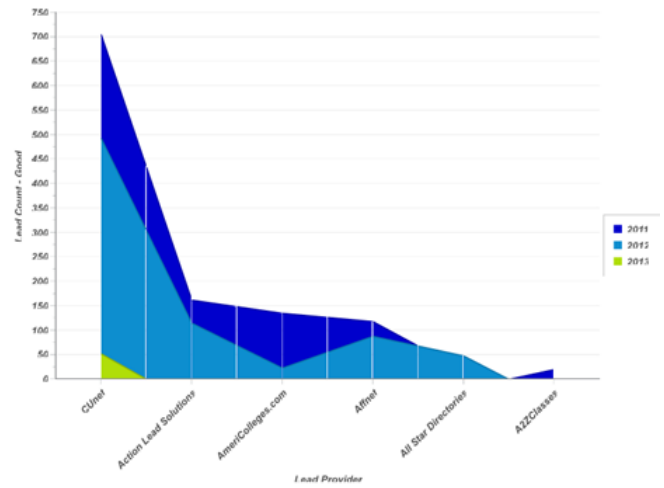
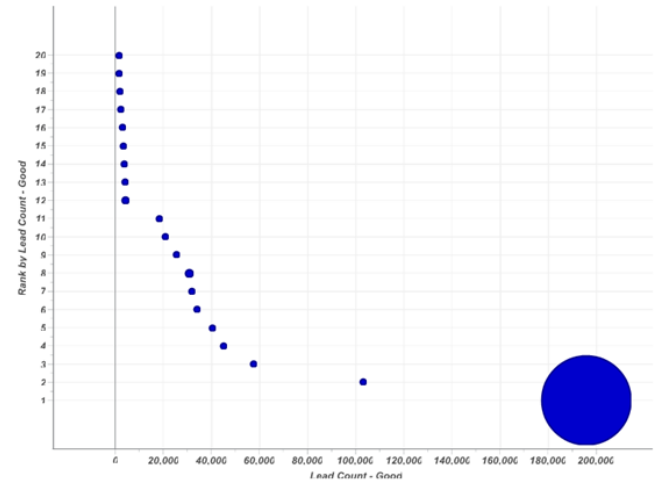
The following table describes the report formats and provides an example for each as well as lists the options that are available from the *Layout* panel:

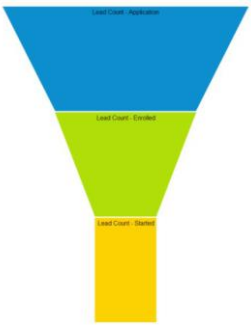
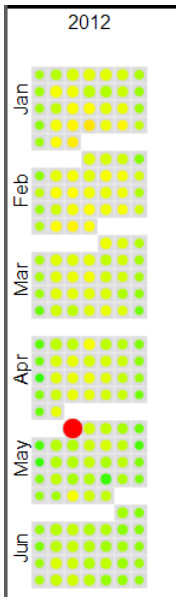
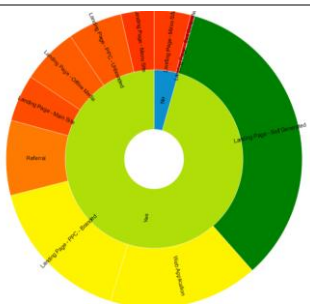
Report Type	Format	Description	Example	Layout Panel Options
Table	Table	Default report format; displays the report as a table with rows and columns.		Rows (level field) Columns (level field) Measures (measure field)

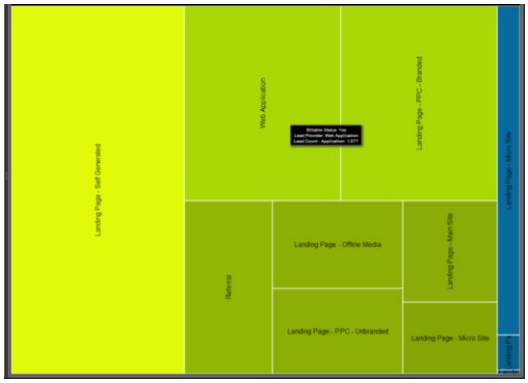
	Lead Buyer		
	ASU	ATA College	ATI School Group
Billable Status	Lead Count	Lead Count	Lead Count
No	9,926	95	3,104
Yes	23,098	160	4,370

Chart (Graph)	Column	Graph format; displays the report as a bar graph where the the level field values (e.g., "Lead Providers") are shown as individual color coded bars.		X Axis (level field) Series (level field) Measures (measure field) Multi Chart (level field), optional
	Stacked Column	Graph format; displays the report as a stacked bar graph where the level field values (e.g., "Lead Providers") are shown in a single bar as color coded vertical stacks.		X Axis (level field) Color Stack (level field) Measures (measure field) Multi Chart (level field), optional
	100% Stacked Column	Graph format; displays the report as a stacked bar graph where the level field values (e.g., "Lead Providers") are shown in a single bar as color coded vertical stacks. Instead of the measure field being displayed in number format, it is displayed as percentages totalling 100.		X Axis (level field) Color Stack (level field) Measures (measure field) Multi Chart (level field), optional
	Column-Line Combo	Graph format; displays the report as a combination of bar graph and line graph. The bars represent data from the measure field that is placed in the Measures - Column section of the *Layout* panel while the lines represent data from the measure field that is placed in the "Measures - Line" section.		X Axis (level field) Series (level field) Measures (measure field) Multi Chart (level field), optional

	Bar	Graph format; displays the report as a horizontal bar graph where the the level field values (e.g., lead providers) are shown as individual color coded bars.		Y Axis (level field) Series (level field) Measures Column (measure field) Measures Line (measure field) Multi Chart (level field), optional
	Stacked Bar	Graph format; displays the report as a horizontal stacked bar graph where the level field values (e.g., "Lead Providers") are shown in a single bar as color coded vertical stacks.		Y Axis (level field) Color Stack (level field) Measures (measure field) Multi Chart (level field), optional
	100% Stacked Bar	Graph format; displays the report as a horizontal stacked bar graph where the level field values (e.g., "Lead Providers") are shown in a single bar as color coded vertical stacks. Instead of the measure field being displayed in number format, it is displayed as percentages totalling 100.		Y Axis (level field) Color Stack (level field) Measures (measure field) Multi Chart (level field), optional
	Line	Graph format; displays the report as a line graph.		X Axis (level field) Series (level field) Measures (measure field) Multi Chart (level field), optional (Properties: bullet style, line width)

	Pie	Graph format; displays the report as individual pie graphs for the level field values (e.g., "Lead Providers").		Slices (level field) Multi Pie (level field), optional Measures (measure field)
	Area	Graph format; displays the report as a presentation graphic whereby a change in values is emphasized by filling in the portion of the graph beneath the line connecting data points. This type of graph is based on the line graph.		X Axis (level field) Series (level field) Measures (measure field) Multi Chart (level field), optional
	Scatter	Graph format; displays the report as a collection of points to display values for two variables for a set of data. The data is displayed as a collection of points, each having the value of one variable determine the position on the horizontal axis and the value of the other variable determine the position on the vertical axis.		X Axis (measure field) Y Axis (measure field) Points (level field) Color By (level field) Size By (measure field) Multi Chart (level field), optional (Properties: pattern, color, reverse colors)
	Heat Grid	Graph format; displays the report as a series of circles or squares that represent a set of data depending on their size and color.		X Axis (level field) Y Axis (level field) Color By (measure field) Size By (measure field) (Properties: pattern, color, reverse colors, bullet style)
	Geo Map	Graph format; displays information geographically on a map. For example, it may show lead count by lead provider in which case the "dot" sizes on the map (representing lead		Geography (level field) Color By (measure field) Size By (measure field) Other fields (level field) (Properties: pattern, color,

		count) would be scattered across the map according the lead providers' geographic locations.		reverse colors)
	Funnel Map	Graph format; displays data as a funnel diagram. This is useful for showing how inquiries have performed according to a typical sales pipeline. For example, you may want to show how inquiries have progressed through various milestones.		Data Points (measure field) Measure (measure field)
	Calendar Map	Graph format; displays data similar to a Geo Map except that it overlays data on a calendar rather than a geographic map. This graph format allows you to identify date-based patterns, such as when a higher/lower number of inquiries were received on x dates. Each point on the map has a size and color that can be populated by a measure. For this map type, you must use a date hierarchy at the day level (e.g., Received Day).		Date (day-related level field such as "Received Relative Day") Color By (measure field) Size By (measure field) (Properties: pattern, color, reverse colors)
	Chord Map	Graph format; displays how data from one hierarchy maps or contributes to another hierarchy.		Item 1 (level field) Item 2 (level field) Measure (measure field)
	Sunburst Map	Graph format; displays a multi level pie chart that is depicted as concentric rings, whereby each ring is a different hierarchy.		Data Points (measure field) Measure (measure field) (Properties: sorting, pattern, color, reverse colors)

	Tree Map	Graph format; displays the relative magnitude of various numbers as areas of a rectangular tile.		Data Points (measure field) Measure (measure field)

In addition, once you have selected your graph format and content, you can specify additional chart options. When you click Chart Options from the *Properties* section of the *Layout* panel, the *Chart Options* dialog box is displayed. From here, you can specify background and label formats, primary and secondary axis range and scale, legend details, and multi chart and domain limits. The following table describes each of these options:

Tab	Option	Description
General	Background	Select the fill type (none, solid, gradient) and color of the graph background.
	Labels	Select the format, size, and type (regular, bold, italic) of the graph text.
Axis	Primary/Secondary Axis/Scale	Select "Auto Range" for the primary axis or secondary axis [used only for line or combo line graphs; to allow the generated data to determine the range of data for the graph (e.g., if the report shows lead counts from 1 - 1000, the graph automatically ranges the data from 1 to 1000)]. Or, you can populate a start and stop range to specify a particular range of report data to show on the graph (e.g., 50 - 2000); this modifies the graph in relation to the data range. You can also select a scale to apply to the primary/secondary axis, such as hundreds, thousands, etc. This is useful if you have large numbers in your data set (e.g., in the hundreds, thousands, or tens of thousands) and it is easier to view the data on a smaller scale.
Legend	Position and Format	Select whether to display the legend on the report, as well as specify the position, background color, and font, size, and type (i.e., normal, bold, italics).
Other	Multi Charts	If you are using multi charts, select the maximum number of charts to display per row on your report. A separate graph is created for each value of the level field that is selected for the multi chart option.
	Domain Limits	The maximum number of plot points that can be displayed on any axis. This parameter is intended to limit data that can be reasonably displayed on a graph that contains large amounts of data.

Report Formatting

Once you have created your report, you may choose to modify additional criteria that controls how the report and certain data is displayed. These options include determining how empty cells and totals are displayed and whether column headers and row labels are frozen when a user scrolls the report. In addition, you can export the report to PDF, CSV, or XLS formats as well as reset the report to its last saved state or reset to its last column sizing.

The following table describes the additional report options which allow you to control how your report is displayed:

Action	Available From	Description
Control how blank measure cells are displayed	From the *Layout* panel, click Report Options to display the *Report Options* dialog box.	Allows you to control how blank/null measure values are displayed on the report (e.g., shown as "-") and whether a row or column is displayed when a measure value is blank. This option is useful if you want to specify a display format that will easily identify null measure values (since null values are different than zero values). The following rules apply: • If there is only one level field but no measure field on the report, all values are displayed. • If there is more than one level field but no measure field on the report, the report will hide

Action	Available From	Description
		some values. You should not draw any conclusions from the report in this state; instead, add a measure field. **Note**: Report calculations behave differently depending on whether a value is null/blank or zero. For example, when the report calculates averages, zeros are taken into account whereas null/blanks are not.
Control how totals are displayed	From the *Layout* panel, click Report Options to display the *Report Options* dialog box.	Allows you to control whether grand totals are displayed for rows and columns as well as totals for values that have been "filtered out" (i.e., if a filter has been applied to a field). By default, grand totals do not display when you view a report in table format (and totals never display when you view a report in chart format). Click here for more information on how totals and subtotals are displayed in a report.
Freeze panes in a table	From the *Layout* panel, click Report Options to display the *Report Options* dialog box.	Allows you to control whether column headers and/or row labels remain in frozen positions when a user scrolls to view the report.
Reset a report	From the Analyzer Tool header, click  to view a pop-up menu and then then select Reset Report.	Allows you to reset the report to its last saved state.
Reset column sizes	From the Analyzer Tool header, click  to view a pop-up menu and then select Reset Column Sizes.	Allows you to reset the report's column sizes to their last state.
Export a report	From the Analyzer Tool header, click  to view a pop-up menu and then select Export and the file format.	Allows you to export the generated report to a PDF, CSV, or XLS file.
Apply conditional formatting to a report	From the report table, right-click a measure field, select Conditional Formatting, and then choose from the pre-configured list of conditional formatting options.	The following conditional formatting options are available to add to the report (from table format only): • *Color Scale - Green Yellow Red*: Applies gradient coloring to the measure values in ascending order in green, yellow, and red (i.e., the lowest values are shown in green and the highest values are shown in red). • *Color Scale - Red Yellow Green*: Applies gradient coloring to the measure values in ascending order in red, yellow, and green (i.e., the lowest values are shown in red and highest values are shown in green). • *Color Scale - Blue Yellow Red*: Applies gradient coloring to the measure values in ascending order in blue, yellow, and red (i.e., the lowest values are shown in blue and highest values are shown in red). • *Color Scale - Red Yellow Blue*: Applies gradient coloring to the measure values in ascending order in red, yellow, and blue (i.e., the lowest values are shown in red and highest values are shown in blue). • *Data Bar - Red*: Applies a red data bar to each measure value, relative to the other measure values (i.e., the lowest values are shown with a low data bar and the highest values are shown with a high data bar). • *Data Bar - Green*: Applies a green data bar to each measure value, relative to the other

Action	Available From	Description
		measure values (i.e., the lowest values are shown with a low data bar and the highest values are shown with a high data bar). • *Data Bar - Blue*: Applies a blue data bar to each measure value, relative to the other measure values (i.e., the lowest values are shown with a low data bar and the highest values are shown with a high data bar). • *Trend Arrow - Green Red*: Applies a green, upward facing arrow to a measure value that is an "increase" from the previous report value (e.g., from the previous month or week) and a red, downward facing arrow to a measure value that is a "decrease" from the previous report value. • *Trend Arrow - Red Green*: Applies a red, upward facing arrow to a measure value that is an "increase" from the previous report value (e.g., from the previous month or week) and a green, downward facing arrow to a measure value that is a "decrease" from the previous report value.
Name and format columns	Right-click a measure field column and select Column Name and Format.	From the *Edit Column* dialog box, provide a new name for the column as well as format how the measure values are displayed. The available options are: • *Default*: Display the pre-configured default format for the measure value. • *General Number*: Display the measure value as a number and specify the number of decimal places that should be displayed for a value. • *Currency*: Display the measure value as dollar currency and specify the number of decimal places that should be displayed for a value. • *Percentage*: Display the measure value as a percentage and specify the number of decimal places that should be displayed for a value. • *Expression*: Type an MDX expression to specify how the measure value should be formatted. This option is intended for developers who have experience with MDX expressions.
Resize columns	From the report, roll your mouse over a column partition until your cursor changes to two arrows.	By dragging a report column to the right or left, you can make the column larger or smaller. See *Resetting Column Sizes* above for a description of how to revert the columns to their original sizing.

Viewing the Lead Inquiry Screen

Lead Inquiry Overview

Once an inquiry has been received by the Sparkroom application, it is processed, during which it is matched to a filter and defined as a "good" or "bad" inquiry with a verification/reason code applied. The *Lead Inquiry* screen allows you to search for inquiries which have completed this processing stage. Commonly used search criteria are displayed, such as "date range" and "applicant name" as well as additional optional fields to provide a more granular search like "billable status".

It is recommended that you specify a date range to limit the search time, since searching the entire database without a date range may take several minutes. When selecting a date range, you can select one of the pre-configured options such as "today", "yesterday", "last two days", etc., or you can choose "custom" to define your own date period. If choosing "custom", you would select whether the relative date (i.e., the date relative to today) is "days", "weeks" or "months" and then indicate your starting and ending period for the custom date [for the "weeks" date type, you must also select the start/end day of the week (e.g., "Monday"), while for the "months" date type you must also select the start/end day of the month (e.g., "23rd")]. For example, if your relative date type were "days" and you chose the

starting period as 5 days ago and the ending period as 2 days ago, the search would return inquiries from the beginning of 5 days ago until the end of 2 days ago. Similarly, if your relative date type were "weeks" and you chose the starting period as 3 weeks ago on Tuesday and the ending period as 1 week ago on Wednesday, the search would return inquiries from the beginning of Tuesday 3 weeks ago until the end of Wednesday 1 week ago. Finally, if your relative date type were "months" and you chose the starting period as 4 months ago on the 20th day (of the month) and the ending period as 2 months ago on the 15th day, the search would return inquiries from the beginning of the 20th day 4 months ago until the end of the 15th day 2 months ago.

Once the search is completed, from the Results Panel you can view the summary details for each inquiry matching your search criteria. Various information is provided, including lead provider, lead buyer, and applicant data as well as milestones such as enrollment and start dates. All inquiry information displayed from this panel can be exported to CSV or XLS formats and subsequently saved, printed, sorted, and so on.

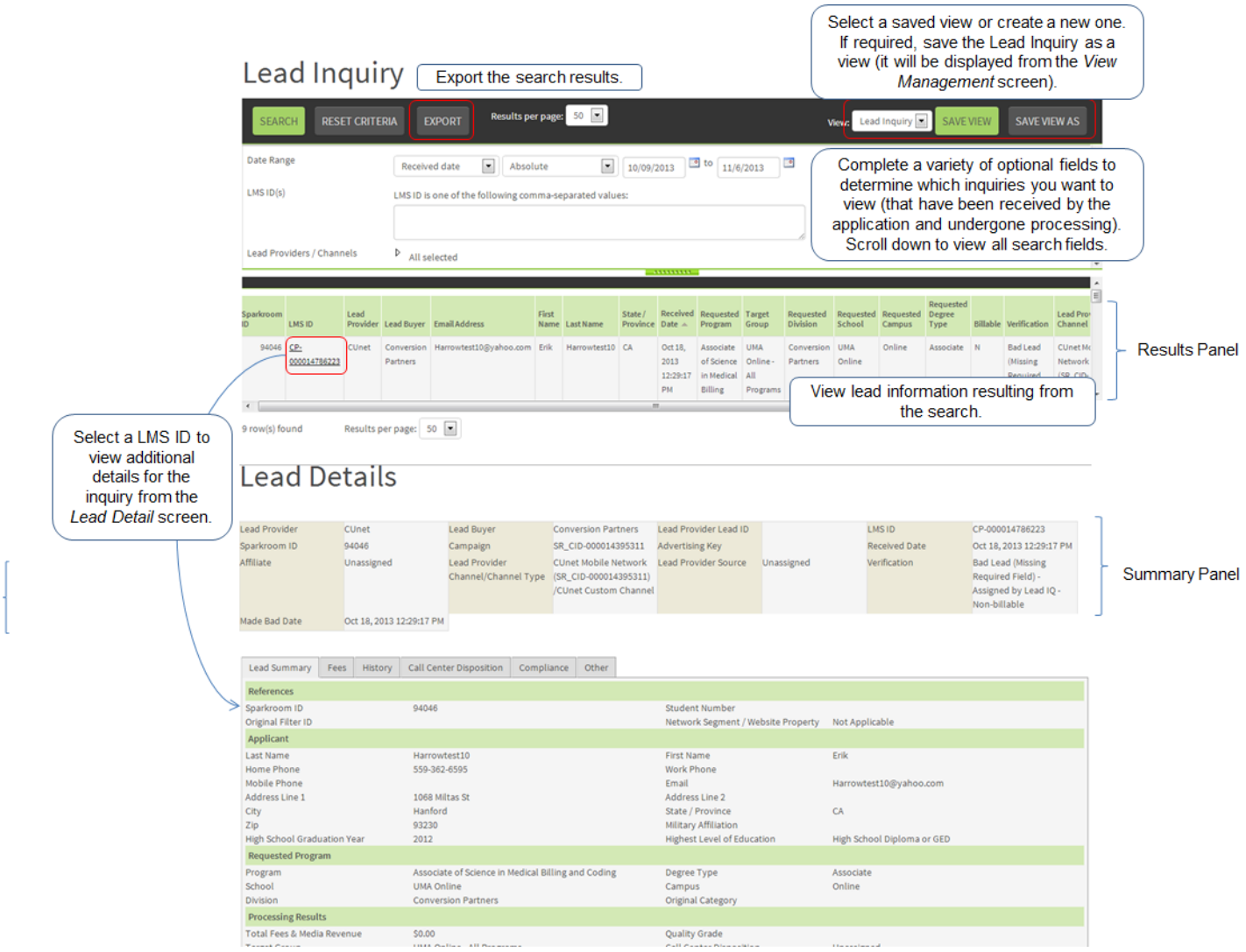
Note: Whether score segment data is included when inquiry data is exported from the *Lead Inquiry* screen depends on if the lead buyer has opted to share this information with the lead provider. For each lead provider, the lead buyer can select the *Share Score Segments* check box when setting up their lead provider relationship.

Further, a lead inquiry can be saved as a "view" and made available from the *View Management* screen under Lead Inquiry Views. From there, you can rename, delete, make searchable, email, and share the view, as well as schedule its export to email or FTP. See *Viewing View Management* for more information on these features.

If you want to view more detailed inquiry information, you can drill down to the *Lead Details* screen via the *LMS ID* column to view additional data. This screen provides details such as reference and applicant summary information, fees, history, and compliance ratings. The *History* tab allows you to view all available inquiry milestones, like the scheduled interview date, admitted date, and start date, which are continually updated by the lead buyer's CMS (content management system) until the inquiry is marked “dead” and no longer tracked in the system.

Lead Inquiry Application Diagram

The following diagram shows the *Lead Inquiry* and *Lead Details* screens:



Viewing Reports

Canned reports, available from the Operations menu of the application, are associated with inquiry and delivery data in the application such as bad inquiries, error logs, user activity, and pricing. Although you can select which data you want to include in a report, the criteria fields and the report list available to you are pre-configured in the application.

Apart from the Pricing Report (which only allows you to select an effective date), most reports allows you to select start and end dates to create a date range for the report data. Once generated in the default HTML view, each report can be exported to PDF, XLS, or CSV format from where it can be saved, printed, etc. using the functions available from the export file. Further, reports can be saved as "views" and made available from the *View Management* screen under *Report Views*. From there, you can rename, delete, make searchable, email, and share the view, as well as schedule its export to email or FTP. The following table describes some of the canned reports available in Sparkroom:

Report	Description
Bad Lead Report	Shows data for all "bad" inquiries received by the Sparkroom application for the time period selected for the report. Selection criteria includes date (the date defaults to the current date), lead buyer, lead provider channel, and verification status. If you maintain the selection criteria defaults when generating the report, all "bad" inquiries for the current date are displayed for all lead buyers, channels, and verification statuses.
Error Log Report	Shows errors generated in the Sparkroom application for the time period selected. Selection criteria includes date (the date defaults to the current date), error ID, if you want to show the message details, and error codes you want to include. If you maintain the selection criteria defaults when generating the report, all errors for the current date are displayed with message details shown. When generated, the report shows the error ID, time stamp, user and company names, error code, and URL for each error.
Pricing Report	Shows how much lead buyers will pay for inquiries for each of their filters. For each filter, the associated pricing group(s) and cost per inquiry is displayed; information is current as of the selected effective date. When a lead buyer changes the CPI for a pricing group, the change is displayed from the report, enabling lead providers to determine how their inquiries are priced over time. If you maintain the selection criteria defaults when generating the report, pricing information for all lead buyer filters is displayed, effective for the current date.
Ping and Post Report	Shows the number of inquiries that were sent by the lead provider to the Sparkroom application for the time period selected. Selection criteria available for the report includes the date (this defaults to the current date). If you maintain the selection criteria when generating the report, all lead providers for the current date are displayed. When generated, the report shows the number of inquiries that were sent by each lead provider, the number of success/error/reject inquiries, the ping rate per hour (i.e. the number of times the lead provider tried to contact the application to transmit data), and the average success respond times.
User Activity Report	Shows audited user activity in the Sparkroom application for the time period selected. Selection criteria available for the report includes date (the date defaults to the current date), if you want to show message details, and the users whose activity you want to view. If you maintain the selection criteria defaults when generating the report, all user activity for the current date is displayed including message details. When generated, the report shows the user ID, user and company names, timestamp, IP, session ID, and application area/module for each user activity. Here is an example of a user activity message: Report?sr_report=User%20Activity%20Report&sr_format=html&DATE_RANGE%5Ejava.lang.String=2011-06-01%2000:00:00X2011-06-01%2023:59:59&Show%20Details%5Ejava.lang.Boolean=true&User%20Name%5Ejava.lang.String=%25|1306944617871 Here is a description/explanation of the above message: The user (ID 1306944617871) generated the User Activity Report in HTML format for June 1, 2011 with the Show Details option selected.

Viewing View Management (Lead Inquiry, Report, Dashboard, Pivot)

From the *View Management* screen, you can manage the lead inquiry, report, dashboard, and pivot views you have created, those shared with you by other users, or those you have added to your list (but which have been created by another user). Views created by other users are listed under the *Public Views* section of the screen, while views created by you are listed under *My Views*. While you can delete, rename, make searchable, share, display from the navigation panel, email (the view gets emailed to the email address that is specified in your user profile), or schedule and export any view you have created, as well as create and configure dashboard views, you cannot perform these functions on public views. For each public view, you can only remove the view (this deletes the view from your list but does not remove it from the system).

When a view is scheduled, it will be run overnight and automatically exported to email or FTP (depending on your selections) so that it is available at the start of the next working day on the selected date. View results are based on the parameters/criteria you selected and saved for the report, dashboard, pivot, or inquiry view. When scheduling a view for export, if you choose the email format you will have the option to create a distribution list directly from the scheduling screen, if required. This allows you to create a distribution list for the email export without having to leave

the screen and do so from the *Distribution List Management* screen.

Viewing the Delivery Monitor

Delivery Monitor Overview

The *Delivery Monitor* screen allows you to search for inquiries which have been received by the application but not yet processed by the system (i.e., they have not been matched to the lead buyer filters). [Once a lead is processed, it appears in lead inquiry (i.e., it can be searched from the *Lead Inquiry* screen), dashboard and pivot views, and is forwarded to downstream systems depending on the lead buyer's lead capture script]. Commonly used search criteria are available, such as "date range" and "applicant name" as well as additional optional fields to provide a more detailed search.

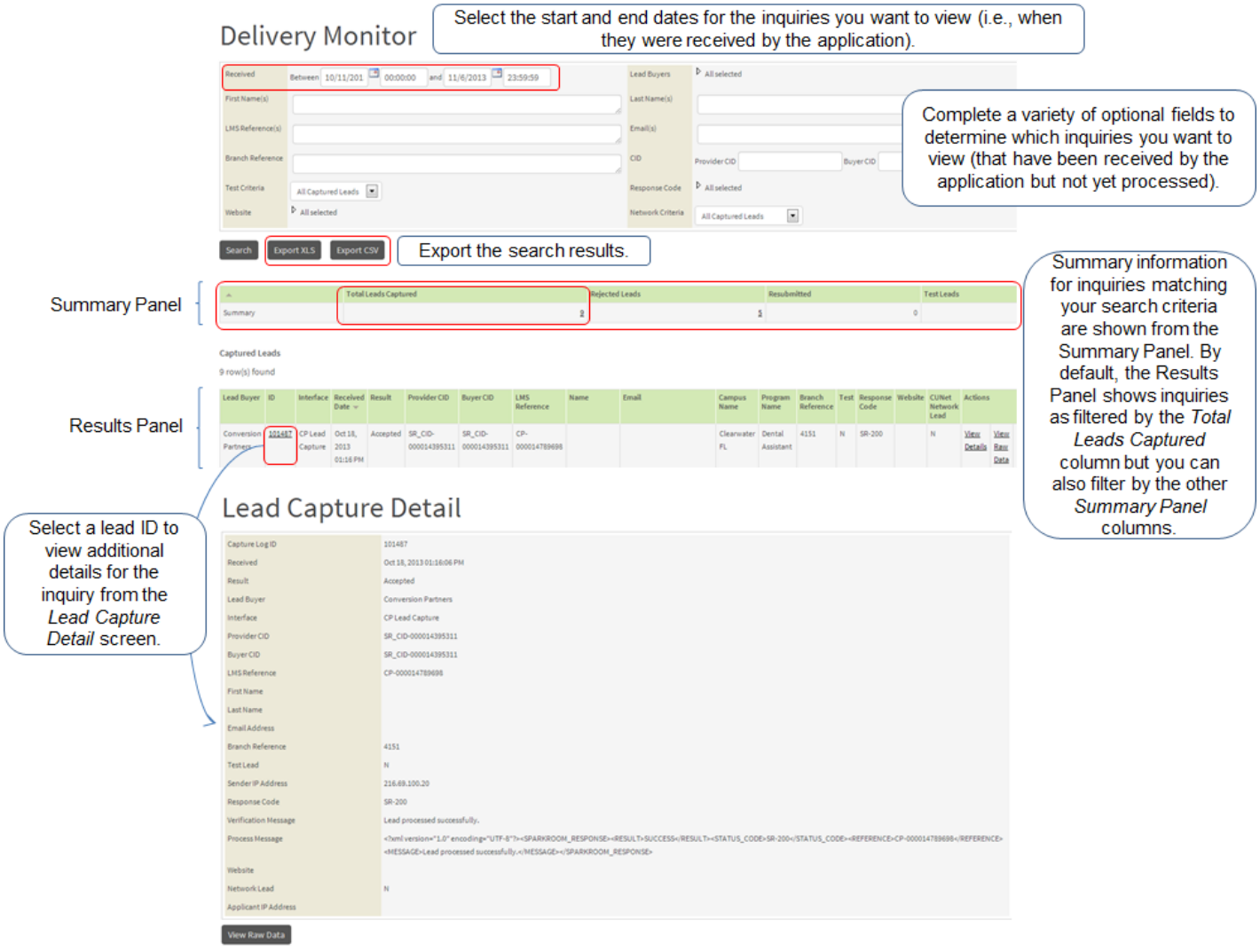
Note: It is recommended you specify a date range to limit the search time, since searching the entire database without a date range may take several minutes.

Once the search is completed, the Summary Panel displays summary information (e.g., total leads captured, etc.) for all inquiries matching your search criteria while the Results Panel displays more granular lead information. Various details are provided for each inquiry including the lead provider, lead buyer, received date, result, and response code. You can filter the Results Panel based on which Summary Panel column you select; by default, the results are filtered by the *Total Leads Captured* column but you can also filter by *Rejected to Lead Provider*.

Finally, inquiry information displayed from this screen can be exported to CSV or XLS formats and subsequently saved, printed, sorted, and so on.

Delivery Monitor Application Diagram

The following diagram shows the *Delivery Monitor* screen, the Results Panel, and the *Lead Capture Detail* screen:



Response Codes

The following table describes the response codes that can be assigned to an inquiry (these codes translate into verification codes which are used internally by the Sparkroom application):

Response Code	Name	Good or Bad Status	Description
SR-200	Not applicable	Good	The inquiry was received and verified successfully.
SR-201	Duplicate lead (no return)	Good	The inquiry was a duplicate but not returned to the lead provider.
SR-202	Unable to score	Good	The inquiry could not be scored by the third party scoring application.
SR-203	Do not work	Good	The applicant was unemployed.
SR-204	Excess	Good	
SR-205	Lead queued for asynchronous verification	Good	The inquiry is in queue for verification.
SR-206	Over cap but accepted	Good	The inquiry was over the target group's allocation but was accepted by the application (i.e., the inquiry was "manually" accepted by the lead buyer).
SR-207	Do not call	Good	The applicant should not be called or contacted.
SR-501	Filter violation	Bad	The inquiry did not match filter criteria. This may indicate that the lead buyer is refusing all inquiries from the lead provider. The message will provide additional detail.
SR-502	Invalid phone number	Bad	The applicant's phone number was invalid.
SR-503	Invalid contact	Bad	The applicant's contact information was invalid.
SR-504	Not specified person	Bad	The name provided on the lead was not an actual person.
SR-505	Duplicate lead	Bad	The lead was a duplicate and was returned to the lead provider.
SR-506	Never applied	Bad	The applicant did not apply to the program.
SR-507	No English	Bad	The applicant does not have English language skills.
SR-508	Other	Bad	The lead failed verification for the reason shown in the message field
SR-510	Duplicate of converted lead	Bad	The inquiry was a duplicate of an inquiry that has already been updated with conversion data from a third party system.
SR-511	Out of area	Bad	The applicant lived out of the postal area defined for the campus or program (i.e., from the *Campus Management* or *Program Details* screen).
SR-512	Not a high school graduate	Bad	The applicant was not a high school graduate.
SR-513	Invalid name	Bad	The applicant's name was invalid.
SR-514	Invalid address	Bad	The applicant's address was invalid.
SR-515	Invalid email	Bad	The applicant's email was invalid.
SR-516	Invalid state	Bad	The applicant's state was invalid.
SR-517	Invalid zip code	Bad	The applicant's zip code was invalid.
SR-518	Invalid level of education	Bad	The applicant's level of education was invalid.
SR-519	Unroutable	Bad	The inquiry could not be routed; no campus was found for the selected program and postal area.

Response Code	Name	Good or Bad Status	Description
SR-520	Duplicate – same lead provider	Bad	The inquiry was a duplicate of another inquiry with the same lead provider.
SR-521	Duplicate – different lead provider	Bad	The inquiry was a duplicate of another post with a different lead provider.
SR-522	Duplicate – identical post	Bad	The inquiry was identical to another post.
SR-523	Invalid graduation date	Bad	The applicant's graduation date was invalid.
SR-524	Invalid external references	Bad	The inquiry's external references were invalid.
SR-525	Invalid country	Bad	The applicant's country was invalid.
SR-526	Missing required field	Bad	The inquiry was missing required fields.
SR-529	Disqualified by 3rd party	Bad	The inquiry was disqualified by a third party, remote system.
SR-530	Over cap	Bad	The inquiry was over the target group's monthly allocation.
SR-531	Test data sent in error	Bad	The inquiry was sent in error during testing.
SR-532	Failed verification	Bad	The inquiry failed the verification process.
SR-533	Enrolled elsewhere	Bad	The applicant enrolled at another school or program.
SR-534	No longer interested	Bad	The applicant is no longer interested in the school or program.
SR-535	Requested degree/program not offered	Bad	The requested degree or program is no longer available.
SR-536	Over daily cap	Bad	The inquiry was over the target group's daily cap.
SR-538	Lead buyer deactivated	Bad	The inquiry was sent from a lead provider that was deactivated in the application.
SR-539	Incentivized	Bad	
SR-540	Do not call (rejected)	Bad	The applicant should not be called or contacted.
SR-541	Zip/postal code doesn't match state/province	Bad	The zip or postal code provided by the applicant did not match their state or province.
SR-542	Campus not active	Bad	The requested campus was deactivated in the application.
SR-543	Program not active	Bad	The requested program was deactivated in the application.
SR-544	Deceased	Bad	The applicant is deceased.
SR-545	No Visa	Bad	The applicant lacks the required Visa for the program.
SR-546	Call center disposition	Bad	The call center assigned a disposition to the inquiry that rendered it "bad', such as "does not speak English", "unable to contact", etc.
SR-547	Seeking employment	Bad	The applicant is seeking employment and no longer interested in the program.
SR-548	Underage	Bad	The applicant is underage for the program.
SR-549	No Internet access	Bad	The applicant does not have access to the Internet.
SR-550	Disqualified by LeadiD audit results	Bad	The inquiry was scrubbed on the basis of the LeadiD audit data.
SR-551	Compliance	Bad	The inquiry was scrubbed due to a compliance violation.

Sparkroom Process Steps

Signing In and Out

- To sign into the Sparkroom application:

  1. Navigate to the URL address of the application.
  2. Complete the following fields (fields with an asterisk are required):

Field	Description
User ID*	Type your user name.
Company*	Type your company name.
Password*	Type your login password.
Remember Me	Select this check box if you want the system to remember your sign in credentials.
Change Password on Sign In	Select this check box to be prompted to change your password upon signing into the application.

  3. Click **Sign In**. The start page of the application is displayed.

- To sign out of the application, from anywhere in the Sparkroom application click **Sign Out**. The login screen is displayed.

Resetting Your Password

1. From the Login screen, select the **Forgot Your Password?** link. The Reset Password screen is displayed.
2. From the *User ID* and *Company* fields, complete your user name and company name, respectively.
3. Click **Continue**.
4. Click **Submit**. A confirmation link is sent to your email address.
5. From your email, open the confirmation message and then select the link and follow the prompts to reset your password.

Note: The confirmation link is only valid for a short time period, after which you must contact Sparkroom Support to reset your password.

Setting the Start Page

6. Navigate to the screen you want to set as your start page for the application. This will be the screen that is displayed each time you log in.
7. Click **Set Start Page**. A confirmation dialog box is displayed.
8. Click **OK**.

Viewing Help

- Click **Help** from anywhere in the application. A new browser window opens, displaying the Sparkroom online help.

  To use the online help, drill down from the left-hand Table of Contents or use the Index or Search features to locate the information you need. While the Previous Topic and Next Topic links available at the top of each page will help you navigate the online help topics in sequence, you can use your browser's Back link (e.g., right-click on your screen and select Back from the short cut menu) to return to the previous page in your navigation sequence.

Viewing and Exporting Lead Buyer Restrictions

1. From the navigation menu, select **Operations > Buyer Restrictions**. The *Buyer Restrictions* screen is displayed.
2. Review the information for each restriction. The lead buyer, channel, school, restricted campus, and restricted program are shown for each lead buyer restriction.

3 If required, click **Export CSV** to export the restrictions and then follow the prompts to open or save the file.

Using the Form Post Instructions Screen

Viewing the Form Post Instructions Screen

1 From the navigation menu, select **Operations > Form Post Instructions**. The *Form Post Instructions* screen is displayed. From the *Lead Buyer/Channel* tab, the list of lead buyers is displayed.

2 Drill down until you locate the channel for the form post instruction details you want to view, and then select the channel to display tabs from the bottom portion of the screen. The following table describes each tab and its fields:

Tab	Field	Description
Instructions	Post URL	The URL address the lead provider will use to post inquiries to the Sparkroom application.
	Description	A brief description of the form post instructions, including any special instructions or details (e.g., "Setting the Test parameter to Y will post a test lead").
	Sample Response	An example response provided by Sparkroom to the lead provider when an inquiry is submitted to the application.
	Result Values	Values which will be returned to the lead provider when an inquiry is submitted to the Sparkroom application (e.g., success, reject, failure), along with their descriptions and status codes.
	Status Codes	All status codes which can be returned to the lead provider and their descriptions.
Parameters	Hidden	Form post instruction parameters which are hidden in the lead generation form which the consumer sees, but are passed along to Sparkroom when the lead is submitted. For each parameter, the parameter name, input value, maximum number of accepted characters, description, and whether it is required are provided.
	Text	Form post instruction parameters which are in text format. For each parameter, the parameter name, parameter label, maximum number of accepted characters, description, and whether it is required are provided.
	List	Form post instruction parameters which are in list format. For each parameter, the parameter name, parameter label, list values, description, and whether it is required are provided.
Form	Form Markup	The form markup code for the form post instructions.
	Sample Form	An example form used for posting inquiries.
	Response	The response the lead provider would receive after posting an inquiry.
Documents	Date	The date the document was uploaded to the application by the lead buyer.
	Document	The document name.
	Actions	Action(s) that can be performed such as downloading the document.
Schools and Campuses	n/a	Select each campus to view the campus details, such as the name, external reference, short and long descriptions, keywords, programs, and so on.
Programs	n/a	Select each program to view the program details, such as the name, external reference, short and long descriptions, keywords, campuses, and so on.
Change History	Date	The date and time a change was made to the form post instructions.
	Change Type	The type of change that was made to the form post

		instructions (e.g., "document created").
	Name	The name of the item that pertains to the type of change made. For example, if a document was created this field would display the name of the document.
	Description	A brief description of the change [e.g., if a new document was created, this field may display 'school campus (blocklist.xml) created"].

Exporting FPI Data

1. From the navigation menu, select **Operations > Form Post Instructions**. The *Form Post Instructions* screen is displayed and from the *Lead Buyer* tab, the list of lead buyers is displayed.
2. From the *Lead Buyer/Channel* column, drill down until you locate the lead buyer you want to export form post instructions from.
3. From the *Actions* column, click **Export** and, as required, follow the prompts to export the information to a PDF file.

Using the Dashboard

Creating and Configuring a Dashboard View

1. From the navigation menu, select **View Management** and then select the type of dashboard view you want to create. The <*Dashboard Name*> *Dashboard Template* screen is displayed.
2. From the *View* drop-down, verify that the template is selected.
3. Click **Configure**. The *Configuration* dialog box opens.
4. From the *Date Periods* tab, select the date range from the drop-down as follows:

Option	Description
Absolute	Select start and end dates for the view.
Week to Date	Select the past week as the time period (i.e., as of the current date).
Last Week	Select the last calendar week as the time period (i.e., Sunday to Saturday).
Month to Date	Select all days in the current month as the time period (i.e., as of the current date). By default, this option is selected.
Last Month	Select the last complete calendar month as the time period (i.e., first day of the month to the last day of the month).
Last Two Months	Select the last two calendar months as the time period.
Quarter to Date	Select the current quarter as the time period, up until the current date.
Last Quarter	Select the past quarter as the time period.
Year to Date	Select the current year as the time period, up until the current date.
Last Year	Select the previous calendar year as the time period.
Custom	Define a custom date range. The following options are available, as required: ○ Starting x number of days/weeks/months ago ○ On the exact day/nth day of week/nth day of month/first day of month/first day of quarter/first day of year ○ Ending x number of days/weeks/months ago ○ On the exact day/nth day of week/nth day of month/last day of month/last day of quarter/last day of year (The w*here n*= field becomes editable if you select one of the *nth day of week* or *nth day of month* options above).

5. (Optional) Click **Add Date Range** and repeat Step 4 to add additional date ranges as required. (To remove a date range, click x beside the date range).
6. Select the **Columns Included** tab.
7. Select the check box beside each measure you want to include as a column in the view. For dashboard view measure definitions, click here.

8 Select the **Selection Criteria** tab.

9 For each of the following categories that are available for the type of dashboard view you are working with, select the required check box(es) to determine which criteria you want to include in the query (by default, all options are selected):

Criteria	Description
Buyer Group 1 by Buyer/Target Group/Channel	Select the first lead buyer group by buyer, target group, and channel. **Note:** Lead buyers are organized into Group 1 and Group 2 (see below) per the provider's discretion, in order to allow the provider to group buyers by performance or other factors at their discretion.
Buyer Group 2 by Buyer/Target Group	Select the second lead buyer group by buyer and target group. **Note:** Lead buyers are organized into Group 1(see above) and Group 2 per the provider's discretion, in order to allow the provider to group buyers by performance or other factors at their discretion.
Buyer Group 2 by Buyer/Channel/Target Group	Select the second lead buyer group by buyer, channel, and target group.
Contact Method	Select the method used to contact the applicant and generate the inquiry.
Applicant State/Province	Select the applicant state or province to include in the view.
Requested School/Campus	Select the requested schools and campuses to include in the view.
Requested Program	Select the requested programs to include in the view.
Requested Degree Type	Select the requested degree types to include in the view.
Requested Campus Type	Select the requested campus types to include in the view.
Education Lead Provider Affiliate	Select the lead buyers and filters to include in the view.
Lead Provider Source	The lead provider's marketing source for an inquiry, such as search terms or a PPC (pay per click) campaign.
Captured Lead Status	Select whether to include inquiries captured by Sparkroom's HTTP post (and subsequent lead capture script) or inquiries uploaded in a batch file.
Billable Lead Status	Select to include billable inquiries (Y) or non-billable inquiries (N).

10 Click **OK**. The *Configuration* dialog box closes and the dashboard view is displayed. (At any time, you can click Configure to return to the *Configuration* dialog box and change the date, measures/columns, or selection criteria).

11 If required, drill down on lead counts to view additional detailed inquiry information. Clickable lead counts are displayed as underlined numbers in the data table. Click here for a full description of the inquiry details provided.

In addition to viewing inquiry details, you can also export the data to CSV or XLS formats via the Export CSV and Export XLS buttons, and sort each column by clicking the column header.

To return to the dashboard view, right-click and select **Back** from the short cut menu.

Note: This step is only available if you create a dashboard view which contains lead count measures/columns.

12 (Optional) To define graph criteria for the view, see *Process Step - Defining Dashboard View Graph Criteria*.

Lead Count Details (Lead Count Measures Only)

The following inquiry details are available from the <*Measure/Column Name*> <*Received Date*> screen. This screen is displayed when you drill down on a lead count measure from a dashboard view's data table (it is only available for dashboard views containing lead count measures/columns):

Column Name	Description
Sparkroom ID	The unique internal database pointer for an inquiry. (This field is not generally used since the LMS ID is used more often to identify and search for an inquiry in the system).
LMS ID	The identification number assigned to the inquiry by the system; this ID is used internally by Sparkroom to identify the inquiry.
Lead Provider	The lead provider who provided the inquiry.

Column Name	Description
Lead Buyer	The lead buyer who received the inquiry.
First Name	The applicant's first name.
Last Name	The applicant's last name.
State/Province	The applicant's state or province.
Received Date	The date the inquiry was received by the system.
Requested Program	The program the applicant requested on the inquiry.
Target Group	The target group the inquiry was applied to.
Requested Division	The division the applicant requested on the inquiry.
Requested School	The school the applicant requested on the inquiry.
Requested Campus	The campus the applicant requested on the inquiry.
Requested Degree Type	The degree type the applicant requested on the inquiry.
Billable	Whether the inquiry was billable to the lead buyer (Y) or not (N).
Verification	The verification or response code assigned to the inquiry.
Lead Provider Channel	The lead provider's channel the inquiry was sent from.

Applying Conditional Formatting to a Dashboard View

1. From the navigation menu, select **View Management** and then select the type of dashboard view you want to work with. The *<Dashboard Name> Dashboard Template* screen is displayed.
2. From the *View* drop-down, select the view you want to open (the template, along with custom dashboard views you have created or are available to you, are shown from the list). The dashboard view is displayed.
3. Click **Conditional Formatting**. The *Conditional Formatting* dialog box is displayed.
4. For each condition:
   1) From the first drop-down, select the measure you want to apply conditional formatting to (e.g., lead count - bad).
   2) From the second drop-down, select an operator (e.g., greater than).
   3) From the text field, type a threshold value (e.g., 10).
   4) From the third drop-down, select the formatting color (e.g., green).

   (Based on the examples provided for each bullet above, green formatting would be applied to all bad lead counts greater than ten).
5. If required, click **Add** to add conditions (alternately, select the check box beside a condition and click Delete to remove it).
6. Click **OK**. The dialog box closes and the formatting is applied to the data table.

Selecting and Modifying a Dashboard View Display

1. From the navigation menu, select **View Management** and then select the type of dashboard view you want to work with. The *<Dashboard Name> Dashboard Template* screen is displayed.
2. From the *View* drop-down, select the view you want to open (the template, along with custom dashboard views you have created or are available to you, are shown from the list). The dashboard view is displayed.
3. To modify how the dashboard view is displayed, complete the following as required:
   - Click Hide/Show Graph to toggle between showing and hiding the dashboard view's graph.
   - Click Include/Suppress Unformatted Rows to toggle between showing and hiding rows in the data table which don't contain formatting.
   - Click Include/Suppress Empty Rows to toggle between showing and hiding null value rows on the data table.
   - From the data table (i.e., *Static Pool of Leads Received From <X>* panel), select a column header to sort the data table by that column. An arrow is displayed in the column, which you can toggle to reverse the sort.
   - From the data table (i.e., *Static Pool of Leads Received From <X>* panel), click the filter icon on the required

header (not all headers will contain filters) and select the check box beside the criteria(s) you want to include in the view and then click OK. Alternately, to revert the filters to their original state, click Clear Filters.

Saving a Dashboard View

1. From the navigation menu, select **View Management** and then select the type of dashboard view you want to work with. The *<Dashboard Name> Dashboard Template* screen is displayed.
2. Make the required changes to the view. Refer to the relevant Process Step under *Creating and Configuring a Dashboard View* for information on creating and modifying a dashboard view.
3. Select one of the following options:
   - Click **Save View** to save the view using its existing name. (If the view is in use by another user, or you are attempting to save the template, you will be prompted to save the view using a unique name).

   Or

   - Click **Save View As** to save the view using a new name. The *Save As* dialog box is displayed from where you can type the view name into the field and then click **OK**. The view becomes available from the *View* drop-down and is selected by default.

   Once saved, the dashboard view becomes available from the *View Management* screen (see *Viewing View Management* for more information).

Defining Dashboard View Graph Criteria

1. From the navigation menu, select **View Management** and then select the type of dashboard view you want to work with. The *<Dashboard Name> Dashboard Template* screen is displayed.
2. From the *View* drop-down, select the view you want to open (the template, along with custom dashboard views you have created or are available to you, are shown from the list). The dashboard view is displayed.
3. Verify that the graph is visible on the dashboard view. If not, click Show Graph to show the graph view.
4. Scroll down to the *Define Graph Criteria* panel and, from the *Select Graph Series* drop-down, select the type of data you want to show on the graph. The selections available from the drop-down are the columns you selected when configuring the view criteria (refer to *Process Step - Creating and Configuring a Dashboard View* for more information).
5. From the *Select Date Range* drop-down, select the date range you want to display from the graph, if you specified multiple date ranges when configuring the view (see *Process Step - Creating and Configuring the Dashboard View* for more information).
6. From the *Select Graph Type* radio button, choose one of the following options to define the type of graph display you want to use (depending on the measure you are applying to the graph, not all graph types may be available):
   - Select **Bar** to display the graph in a bar format.

   Or

   - Select **Trend** to display the graph in a line format and to identify trends over a specified time period. Complete the *For* and *By* fields to define the time period you want to show (i.e., one, three, six, or twelve months, month to date, quarter to date, or year to date) and the time unit (i.e., day or week) respectively.

     Note: When completing the *For* field, if you select 1mo, 3mo, 6mo, or 12mo data will be shown from the view's most recent month (based on the time period selected from *Process Step - Creating and Configuring a Dashboard View*) minus x number of months. For example, if the view time period is from February to June and you select 3mo the graph would show results for April to June. On the other hand, if you select 6mo the graph would show results for January to June (graphs can display historical data greater than the time period selected for the view).

   Or

   - Select **Time of Day** to display a line graph comparing data based on selected time of day periods. Complete the *Compare* and *To* fields to specify the time of day values as follows:

Field	Option	Description
Compare	Today	Compare today's data with the time period selected from the *To* field. If None is selected from the *To* field, only one line is displayed from

		the graph which shows today's data only.
	Yesterday	Compare yesterday's data with the time period selected from the *To* field. If None is selected from the *To* field, only one line is displayed from the graph which shows yesterday's data only.
To	None	Null value; the time period selected from the *Compare* field will not be compared with any other time period.
	Yesterday	Compare data from the *Compare* field's time period with yesterday's data. This option is not available if you selected Yesterday from the *Compare* field.
	1 Week Earlier	Compare data from the *Compare* field's time period with data from one week ago.
	4 Weeks Earlier	Compare data from the *Compare* field's time period with data from four weeks ago.
	4 Week Average	Compare data from the *Compare* field's time period with the four week average.

7 From the *Graph* column of the *Static Pool of Leads Received From <X>* panel, select the check box beside each element you want to include in the graph.

Note: The criteria available from this list is defined via the *Selection Criteria* tab of the *Configuration* dialog box when you configure the dashboard view (refer to *Process Step - Creating and Configuring a Dashboard View* for more information).

8 Click **Update Graph** to display the graph.

9 (Optional) To change the criteria included in the graph, from the *Graph* column of the *Static Pool of Leads Received From <X>* panel, select or clear the check box beside the element(s) you want to add or remove from the graph.

Exporting a Dashboard View

Note: To schedule an export to email or FTP, see *Process Step - Scheduling a View for Export*.

1 From the navigation menu, select **View Management** and then select the type of dashboard view you want to export. The *<Dashboard Name> Dashboard Template* screen is displayed.

2 From the *View* drop-down, select the view you want to export (the template, along with custom dashboard views you have created or are available to you, are shown from the list). The dashboard view is displayed.

3 Click **Export**, select To PDF, To XLS, or To CSV to specify the file format of the export, and then follow the prompts as required. The dashboard view is exported to the selected format, from where you can save, print, etc. the view using the functions available from the exported file.

Using the Pivot Analysis Tool

Selecting a Pivot View

1 Select one of the following options:

- To select a view from the Pivot Analysis Tool:

  a) From the navigation menu, select **Pivot Views > Pivot Analysis Tool**. The *Pivot Analysis Tool* screen is displayed.

  b) From the *View* drop-down, select the pivot view you want to open [the template (i.e., "pivot analysis tool"), along with user-created pivot views, are shown from the list].

Or

- To select a view using the navigation menu, from the navigation menu select **Pivot Views** and then select the pivot view you want to open [the template (i.e., "pivot analysis tool"), along with user-created pivot views, are shown from the list].

If you selected the template, the *Pivot Analysis Tool* screen is displayed; if you selected a user-created pivot view, on the other hand, the view is displayed showing recent data for the view criteria.

Note: Depending on the frequency with which the update task is scheduled, the pivot view will show current data as of x date and time. The notification at the top of the pivot view screen displays the most recent update. For example, if the last lead data update occurred at 4:00 a.m. on the current day, the message *"Data refreshed at Jun 13, 2011 04:00:00 AM excluding today's leads"* is displayed; in this case, the pivot view you selected contains data that is current up to 4:00 a.m. on June 13th.

2. To configure the pivot view, refer to the required process step under *Configuring a Pivot View*.

Configuring a Pivot View

Creating the Pivot View Query

As described in this section, you can create a pivot view query in one of the following ways:

- By selecting measures and dimensions for the view and configuring them as rows and columns using the icon. For this method, refer to *Process Step - Creating the Query by Selecting Rows, Columns, and Slicers*.

And/Or

- By manually editing the MDX query using the MDX icon. This option requires developer skills and, because it is a course on its own, is not described in detail here; rather, general steps are provided. For this method, refer to *Process Step - Creating the Query via the MDX Query Editor*.

Creating the Query by Selecting Rows, Columns, and Slicers

Note: These Process Steps assume you are creating a pivot view query from the template, although you can also update the query for an existing view. To do so, follow these steps but, in Step 2, select the user-created pivot view you want to update rather than the template.

Note: There is a two year limitation on pivot data. That is, any lead with a received data prior to two years ago (i.e., today minus two years) will not be found in the Analytics database.

1. From the navigation menu, select **Pivot Views > Pivot Analysis Tool**. The *Pivot Analysis Tool* screen is displayed.
2. From the *View* drop-down, verify that Pivot Analysis Tool is selected. This is the template you will configure to create your pivot view query.
3. Click to display the Pivot Query panel on the screen.
4. To add slicer(s)/dimension(s) to the query:
   1) From the *Slicer* section of the panel, select the slicer/dimension you want to include in the pivot view query. The available attributes for the slicer are displayed from the next panel displayed. You may need to expand the selection to view all attributes; you can drill down to view increasing granularity of each attribute (e.g., drill down from birth date 1900-1909 to view birth dates by 1900-1904 and 1905-1909).

      Note: For a description of each slicer/dimension, refer to *Pivot View Dimensions (Slicers)*.

   2) Select the radio button beside the slicer/dimension attribute you want to include in the query.
   3) Click **OK**. The panel closes and you return to the Pivot Query panel. The attribute you selected above is displayed beside the slicer/dimension name.

      Note: To group dimensions into an hierarchy, click **Group**. The "group" tool is useful if there are a lot of members in a particular level since it allows you to add a level of organization for easier navigation. (Alternately, to remove the grouping toggle to **Flat**).

   4) (Optional) To move the slicer/dimension and its selected attribute(s) to a row or column in the pivot view, select or respectively. The slicer/dimension moves from the *Slicer* section to the *Columns* or *Rows* section of the Pivot Query panel. (You can return it to the *Slicer* section at any time by selecting).

      Note: If a slicer/dimension is not included in the row or column of the pivot view, it will be included in query calculations but not displayed as a row or column from the view.

   5) (Optional) To change the order in which the slicer/dimension appears in the pivot view's row or column, select the up or down arrows (and) as required.

6) Repeat Step 4 until you have added all required slicers/dimensions to your query.

5 To add measure(s) to your query:

1) From the *Rows* section of the panel, select **Measures**. The *Measures* panel is displayed from the screen, listing all measures that can be added to the query.

Note: For a description of each measure, refer to *Pivot View Measures*.

2) Select the check box beside each measure you want to include in the query.

3) (Optional) Complete the following operations as required:

- To change the measures' list order:

i) Select the blue circle ( ) beside the measure you want to move. The measure is marked for moving and toggles to a red circle ( ) (which you can select to cancel the move if required).

i) Select the up arrow ( ) or down arrow ( ) to move the measure before or after the selection. The list is updated with the new order.

- To toggle between selecting all or no measures in the list, click All or None respectively. You can also click None to clear the current selection of measures.

- To group measures into an hierarchy, click **Group**. The "group" tool is useful if there are a lot of members in a particular level since it allows you to add a level of organization for easier navigation. (Alternately, to remove the grouping toggle to Flat).

4) Click **OK**. The *Measures* panel closes and you return to the Pivot Query panel.

5) (Optional) To move the measure(s) from the *Rows* to the *Column* section, select beside Measures. (You can return the measures to the *Columns* section at any time by selecting).

6) (Optional) To move the measure(s) to the *Slicers* section, select beside Measures. The Measures value is displayed from the *Slicers* section; you may have to scroll down to view it since the list is sorted alphabetically.

Note: If Measures is not included in the *Rows* or *Columns* section, the measure(s) will be included in query calculations but not displayed as row(s) or column(s) from the view. In addition, when you move Measures to the *Slicer* section of the panel, the measure(s) are treated as slicers/dimensions so that, when you click Measures and open the *Measures* panel, each measure is displayed as a radio button rather than as a check box (and therefore only available for "single selection"). To make the measures available for "multiple selection", you must return Measures to the *Rows* or *Column* section via the or icons. This behavior is true for dimensions as well.

7) (Optional) To change the order in which the measures will appear in the pivot view row(s) or column(s), select the up or down arrows (and).

6 Click **OK**. The *Measures* panel closes and the pivot view results are displayed from the *Pivot Analysis Tool* screen.

7 (Optional) To return the query to its original state, select . If you are working with the pivot view template, the query is returned to its original format; if you are working with a user-created pivot view, the query is returned to its last saved state.

8 To configure the graph or change the view appearance, refer to *Process Step - Configuring the Pivot View Graph* and *Process Step - Controlling the Pivot View Appearance* respectively.

9 Save the view. For details, refer to Steps 4 - 5 from *Process Step - Saving a Pivot View*.

Creating the Query via the MDX Query Editor

Note: These Process Steps assume you are creating a pivot view query from the template, although you can also update the query for an existing view. To do so, follow these steps but, in Step 2, select the user-created pivot view you want to update rather than the template.

1 From the navigation menu, select **Pivot Views > Pivot Analysis Tool**. The *Pivot Analysis Tool* screen is displayed.

2 From the *View* drop-down, verify that Pivot Analysis Tool is selected. This is the template you will configure to create your pivot view query.

3 Click MDX. The *MDX Query Editor* panel is displayed from the screen.

4 From the MDX Query Editor, type the query into the space provided or update the existing query.

Note: Editing the MDX query requires developer skills and, because it is a course on its own, is not described in detail here. General steps are provided only.

5 Select one of the following options:

- To apply the changes, click **Apply**. The query is applied to the pivot view.

Or

- To undo the changes and revert the query to the last saved state, click **Revert**. The query changes you made are undone.

6 To close the MDX Query Editor, click the x in the top right corner of the editor. The MDX Query Editor closes.

Important: If you have not saved/applied your query when you close the editor, your changes will be lost.

7 Save the view. For details, refer to Steps 4 - 5 from *Process Step - Saving a Pivot View*.

Configuring the Pivot View Graph

1 From the navigation menu, select **Pivot Views > Pivot Analysis Tool**. The *Pivot Analysis Tool* screen is displayed.

2 From the *View* drop-down, select the pivot view you want to configure the graph for. For information on creating a pivot view, refer to *Configuring a Pivot View*.

3 Select  to show the graph on the screen. The graph displays below the pivot view table.

4 Select  to display the *Chart Properties* panel on the screen.

5 Complete the following fields, as required:

Field	Description
Chart Type	From the drop-down, select one of the following chart types: ○ Horizontal bar ○ Horizontal bar 3D ○ Vertical bar ○ Vertical bar 3D ○ Stacked vertical bar ○ Stacked vertical bar 3D ○ Stacked horizontal bar ○ Stacked horizontal bar 3D ○ Vertical line ○ Horizontal line ○ Vertical area ○ Horizontal area ○ Vertical stacked area ○ Horizontal stacked area ○ Pie charts by column ○ Pie charts by row
Enable Drill Through	This field is a placeholder for future functionality.
Chart Title	Type a title for the chart.
Chart Title Font	Select a font for the chart title.
Horizontal Axis Label	Type a title for the horizontal axis.
Vertical Axis Label	Type a title for the vertical axis.
Axes Label Font	Select a font for the horizontal and vertical axes labels.
Axes Tick Label Font	Select a font for the tick labels along the horizontal and vertical axes.

Show Legend	Select the check box to show the legend and then select the desired location from the drop-down (i.e., top, bottom, left, right).
Legend Font	Select a font for the legend.
Show Slicer	Select the check box to show the slicer title on the graph and then select the desired location: from the first drop-down, select the axis such as top, bottom, left, or right axis; and from the second drop-down, select the location along that axis, such as left, center or right.
Slicer Font	Select a font for the slicer.
Chart Height	Type the graph's height and width into the respective fields.
Background (R, G, B)	Type the R (red), G (green), and B (blue) color values into the respective fields to determine the background color for the graph.

6 Click **OK**.

7 Save the view. For details, refer to Steps 4 - 5 from *Process Step - Saving a Pivot View*.

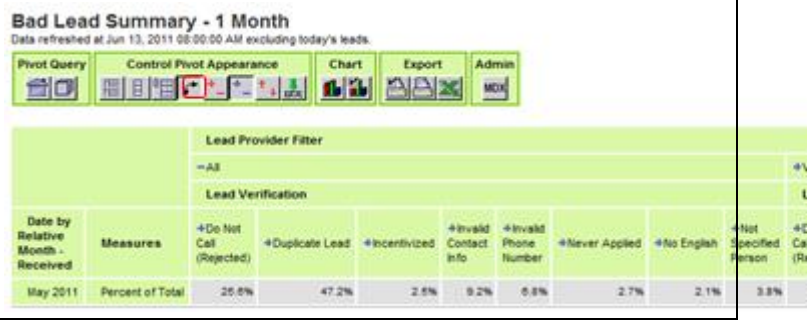
Controlling the Pivot View Appearance

1 From the navigation menu, select **Pivot Views > Pivot Analysis Tool**. The *Pivot Analysis Tool* screen is displayed.

2 From the *View* drop-down, select the pivot view you want to modify.

3 Select one of the following options, as required:

Icon	Name	Description	Example
	Show (or hide) parent members	Displays the parent member(s) of a query in their separate row or column, as opposed to being placed within the same row or column as the children.	With Show Parents turned off:  With Show Parents turned on: 
	Hide (or show) spans	Prevents repeating headers from being displayed when multiple dimensions are nested for a row or column.	With Hide Spans turned off:

			 With Hide Spans turned on: 
	Suppress empty rows and columns	Suppresses the display of a row or column containing null values.	
	Swap axis	Interchanges rows and columns	Before Swap Axis is selected:  After Swap Axis is selected: 

4 Save the view. For details, refer to Steps 4 - 5 from *Process Step - Saving a Pivot View*.

Updating a Pivot View

1. From the navigation menu, select **Pivot Views > Pivot Analysis Tool**. The *Pivot Analysis Tool* screen is displayed.
2. From the *View* drop-down, select the pivot view you want to update.
3. To create or update the query, configure the graph, or change the view appearance, refer to *Creating the Pivot View Query*, *Process Step - Configuring the Pivot View Graph*, and *Process Step - Controlling the Pivot View Appearance* respectively.
4. Save the view. For details, refer to Steps 4 - 5 from *Process Step - Saving a Pivot View*.

Saving a Pivot View

1. From the *View* drop-down, select the template or the custom view you want to modify.
2. Make the required changes to the view. Refer to *Configuring a Pivot View* for information on creating a pivot view and *Process Step - Updating a Pivot View* for information on modifying an existing pivot view.
3. Select one of the following options:
   - If you are modifying an existing view which you previously created, click **Save View** to save the view using the same name.

     Note: If you click Save View for a pivot view created by another user, you will be prompted by the *Save As* dialog box since you cannot overwrite data for a view unless you created it.

   Or

   - If you are creating a new view based on the template, updating a view created by another user, or changing the name of an existing view you created:
     a) Click **Save As**. The *Save As* dialog box is displayed.
     b) Type the view name into the field.
     c) Click **OK**.
4. From the confirmation dialog box, click **OK**. The dialog box closes and the view is saved. Once saved, the pivot view becomes available from the *View Management* screen (see *Viewing View Management* for more information).

Exporting and Printing a Pivot View

Note: To schedule an export to email or FTP, see *Process Step - Scheduling a View for Export*.

1. From the navigation menu, select **Pivot Views > Pivot Analysis Tool**. The *Pivot Analysis Tool* screen is displayed.
2. From the *View* drop-down, select the pivot view you want to export and print.
3. (As required) To configure print settings for the PDF output:

   Note: These settings affect the PDF output only and are not applied to the Excel output described in Step 5.

   1) Click  . The *Print Properties* panel is displayed on the screen.
   2) Complete the following fields, as required:

Field	Description
Report Title	Type the pivot view name into the field.
Page Orientation	From the drop-down, select the page orientation for your print job (i.e., Portrait or Landscape).
Paper Size	From the drop-down, select the paper size for your print job.
Custom Height/Width	Type the print paper's custom height and width into the first and second fields, respectively.
Table Width	Set the table width by selecting the check box and typing the desired width into the field.
Chart on Separate	Select the check box to print the graph on a separate page.

Page	

3) Click **OK**.

4 (As required) To print the pivot view via a PDF file, click  and then follow the prompts to open the PDF. The PDF file opens in a separate window, with the print settings you configured in Step 3 applied. From here, you can save and print the pivot view.

5 (As required) To print the pivot view via an Excel file, click  and then follow the prompts to open the file. The Excel file opens in a separate window, from where you can format, save, and print the pivot view.

Creating Reports with the Analyzer Tool

Creating a Report (Adding Fields)

Note: There is a two year limitation on pivot data. That is, any lead with a received data prior to two years ago (i.e., today minus two years) will not be found in the Analytics database.

1 From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.

2 From the *Available Fields List* panel, scroll down to view the level and measure fields that can be added to a report. If required, use the Find feature to locate a specific field in the list. As you type, the list narrows to include only item(s) that match the value provided. To revert to the original list of fields, clear the *Find* field or click x from the *Find* field.

3 To view a description for a field, from the *Available Fields List* panel right-click the field and select **Tell Me About ...** An "About" dialog box is displayed with the following information:

Field	Description
Name	The name of the field (e.g., Lead Provider)
Type	The field type (e.g., level field or measure field)
Description	The field description, if one has been provisioned. A description may be provided for a field when the list of available fields is configured by the Sparkroom Implementation Team in the schema.
MDX	The MDX expression used for the field.

4 To add a field to the report, select one of the following options:

- Right-click the field and then select **Add to Report**. If it is a level field, it is added to the *Rows* section of the *Layout* panel (although you can drag-and-drop it to the *Columns* section at any time to change it from a row in the report to a column). If it is a measure field, it is added to the *Measures* section of the *Layout* panel. You cannot move a measure field to the *Rows* or *Columns* section.

Or

- Double-click the field. If it is a level field, it is added to the *Rows* section of the *Layout* panel (although you can drag-and-drop it to the *Columns* section at any time to change it from a row in the report to a column). If it is a measure field, it is added to the *Measures* section of the *Layout* panel. You cannot move a measure field to the *Rows* or *Columns* section.

Or

- Drag-and-drop the field to the *Layout* panel. If it is a measure field, you can drag it to the *Measures* section of the *Layout* panel. If it is a level field, you can drag it to the *Rows* or *Columns* section of the *Layout* panel. You cannot drop a measure field in the *Rows* or *Columns* section.

Note: To add a field which belongs to an hierarchy, from the *Layout* panel or the report right-click the field that is part of the hierarchy and select Also Show. From the list of fields that is displayed, select the field you want to add to the report. (If a field is not part of an hierarchy, the "Also Show" option from the menu will be grayed out and cannot be selected). When you add fields to the report which are in the same hierarchy (e.g., Lead Provider and Channel), you must place them on the same report "axis". That is, both fields must be placed as rows or as columns, but you cannot add one field as a row and the other field as a column. For more information on field hierarchies, click here.

Note: If a field contains member properties (i.e., if a number is displayed in parenthesis next to the field name),

you can add the property(s) to the report by right-clicking field, selecting Show Properties, and selecting the property you want to include in the report. (If a field is not part of an hierarchy, the "Show Properties" option from the menu will be grayed out and cannot be selected). For more information on member properties, click here.

Saving a Report

1. Once you have created your report and want to save the data, select one of the following options:

   - To save the report using the last saved name:

     a) Click  .

     b) From the confirmation dialog box, click **OK**.

   Or

   - To save the report using a new name:

     a) Click  . The *Save As* dialog box is displayed.

     b) Type a name into the field and click **OK**.

     c) From the confirmation dialog box, click **OK**.

   Once saved, the report becomes available from the *View Management* screen as a "view".

Opening a Saved View and Switching Schemas

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Click **Switch View** and then select one of the following options:

   - Analyzer Tool: Toggle to open the basic Analyzer Tool schema, if you are already in the Advanced Analyzer Tool.

   Or

   - Advanced Analyzer Tool: Toggle to open the advanced Analyzer Tool schema, if you are already in the Basic Analyzer Tool.

   Or

   - <report name>: Open the saved report view to continue working on the report.

Controlling the Analyzer Tool Appearance

Showing/Hiding the Available Fields List

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens. When you first launch the Analyzer Tool, the *Available Fields List* panel is shown by default.
2. Select one of the following options:

   - If your *Available Fields List* panel is displayed, to hide it click  from the top of the screen (when you hover over the icon, the message displays as "Hide list of available fields"). The *Available Fields List* panel toggles to hidden.

   Or

   - If your *Available Fields List* panel is hidden, to display it click  from the top of the screen (when you hover the icon, the message displays as "Add more fields onto the report"). The *Available Fields List* panel toggles to displayed.

Showing/Hiding the Layout Panel

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens. When you first launch the Analyzer Tool, the *Layout* panel is shown by default.
2. Select one of the following options:

   - If your *Layout* panel is displayed, to hide it click  from the top of the screen (when you hover over the icon, the message displays as "Hide layout panel"). The *Layout* panel toggles to hidden.

   Or

   - If your *Layout* panel is hidden, to display it click  from the top of the screen (when you hover the icon, the message displays as "Rearrange fields on the report"). The *Layout* panel toggles to displayed.

Showing/Hiding the Filters Panel

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens. When you first launch the Analyzer Tool, since there are no filters applied to the report yet the *Filters* panel is hidden by default.
2. Select one of the following options:

   - If your *Filters* panel is hidden, to display it click  from the top of the screen (when you hover over the icon, the message displays as "Show all filters in use and add new filters"). The *Filters* panel toggles to displayed.

   Or

   - If your *Filters* panel is displayed, to hide it click  from the top of the screen (when you hover the icon, the message displays as "Hide filters"). The *Filters* panel toggles to displayed.

Modifying the Available Fields List Sort Order

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. From the *Available Fields List* panel, click the **View** drop-down and then select one of the following options to change the sort order of the list (by default, the list is sorted by field category):

   - *Field Category*: By default, the *Available Fields List* panel is sorted by field category so that fields are displayed in alphabetical order by category (i.e., all fields belonging to the same hierarchy are shown together, such as Lead Provider/Channel).

   Or

   - *Measure - Level - Time*: The *Available Fields List* panel is sorted by measure fields first, then level fields, followed by time period fields. Because in this beta version of the Analyzer Tool time period fields are categorized as level fields (e.g., Application Relative Month field), the fields are ordered by measure and level fields only.

   Or

   - *A > Z*: The *Available Fields List* panel is sorted by fields in alphabetical order by name.

   Or

   - *Schema*: This sort option is available in the application but, if selected, will not have an affect on the sort order since there is only one default schema available with the Analyzer Tool.

Modifying Reports

Renaming a Level Field and Assigning a Plural Name

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. From the *Layout* panel or the report, right-click the field you want to rename.
3. Click **Edit**. The <level field> dialog box is displayed.
4. Complete the following fields as required:

Field	Description
Name	Type the modified name for the field (e.g., "Affiliate").
Plural Name used in this Report	Type the field name that will be used when it refers to plural values (e.g., "Affiliates").

Note: The *Original Name* and *Original Plural Name* fields cannot be edited. These fields display the original name and original plural name assigned to the field during implementation, respectively (the latter may not be available for all fields).

5. Click **OK**.
6. Click **Refresh Report** to apply the changes.

Removing a Field

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Select one of the following options:

   a) From the *Layout* panel or the report, right-click the field (level or measure) you want to remove from the report.

   b) Select **Remove from Report**.

   Or

   - Drag the field from the *Layout* panel or the report to the bottom right corner of the report, and "drop" the field into the garbage can icon that appears.

3. Click **Refresh Report** to apply the changes.

Rearranging Level Fields

Note: You cannot rearrange measure fields because these types of fields can only be placed in the Measure section of the *Layout* panel/report.

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Select one of the following options:

   - From the *Layout* panel, drag-and-drop the level field from the Rows section to the Column section, or vice versa. If you are moving a field above or below another field, when you see a green horizontal line drop the field.

   Or

   - From the report, drag-and-drop the level field to its new position (i.e., drag the field from a row in the report to a column in the report). If you are moving a field from a row to a column, drag the field to the required location and, when you see a green vertical line, drop the field. If you are moving a field from a column to a row, drag the field to the required location and, when you see a green horizontal line, drop the field.

3. Click **Refresh Report** to apply the changes.

Creating a Calculated Measure

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Right-click the measure you want to base your calculated measure on.
3. Select **User Defined Measure > Calculated Measure** from the menu. The *New Calculated Measure* dialog box is displayed.
4. From the *Name* field, type a name for the new measure field.
5. From the *Format* field, select one of the following number formats for the field:
   - *Default*: The value is displayed as a number without decimal places (regardless of whether x number of decimal places is selected in Step 6) (e.g., 100).

   Or

   - *General Number*: The value is displayed as number (e.g., 100.00).

   Or

   - *Currency*: The value is displayed as a dollar sign currency (e.g., $100.00).

   Or

   - *Percentage*: The value is displayed as a percentage (e.g., 50.00%).

   Or

   - *Expression*: The value is displayed according to the MDX expression specification. If Expression is selected but the MDX expression does not specify a value format, the value is displayed as a general number.
6. From the *Decimal* field, select the number of decimal places that will be displayed for the measure field value.
7. From the left hand column, select the measure you want to include in the calculation and then click the > arrow. The measure is moved to the right hand column. Repeat this step until you have added the required measures.
8. Add the required operator(s) to the measure(s). To add an operator, click where you want the operator to be placed and then select the operator. (Click Clear to delete the expression and start again, if required).
9. If you want the report to calculate subtotals using the measure formula you created in Steps 7-8, select the **Calculate Subtotals Using Measure Formula** check box (this check box is selected by default). Otherwise, if this check box is cleared, the report will calculate subtotals by summing the values without applying the formula. For more information about this check box, click here.
10. Click **OK**.
11. Click **Refresh Report** to apply the changes.

Editing a Calculated Measure

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Right-click the calculated measure you want to edit.
3. Select **User Defined Measure > Edit Calculated Measure** from the menu. The *Edit Calculated Measure* dialog box is displayed.
4. Edit the fields as required. For field and process descriptions, refer to Steps 4 - 9 from *Process Step - Creating a Calculated Measure*.
5. Click **OK**.
6. Click **Refresh Report** to apply the changes.

Creating a Trend Measure

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Right-click the measure you want to base your trend measure on.
3. Select **User Defined Measure > Trend Measure** from the menu. The *New Trend Measure* dialog box is displayed.
4. From the *Name* field, type a name for the new measure field.
5. From the *Period Type* field, select the report field to use as your time period (e.g., a year, quarter, or month based field such as Application Relative Month) which will be used to show a "trend" over a period of time.
6. From the *Number of Periods* field, type the number of periods that will be used if you select Average of Previous Periods or Sum of Previous Periods from the *Show Trend As* field in Step 7. The value determines the number of previous periods that will be used for the average or the sum (depending on your selection in Step 8). For example, if you type 3, the average of the previous periods would be based on the last three months (if you are using the Application Relative Month field as your time period).
7. From the *Show Trend As* field, select one of the following options:
   - *Value of Previous Period*: The trend measure will show the value of the previous period.

   Or

   - *Delta from Previous Period*: The trend measure will show the difference between the previous and the current period.

   Or

   - *% of Change from Previous Period*: The trend measure will show the percentage difference between the previous and the current period.

   Or

   - *Average of Previous Periods*: The trend measure will show the average of the previous x periods (x is determined by the number provided in Step 6).

   Or

   - *Sum of Previous Periods*: The trend measure will show the sum of the previous x periods (x is determined by the number provided in Step 6).
8. From the *Decimal* field, select the number of decimal places that will be displayed for the measure value.
9. Click **OK**.
10. Click **Refresh Report** to apply the changes.

Editing a Trend Measure

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Right-click the trend measure you want to edit.
3. Select **User Defined Measure > Edit Trend Measure** from the menu. The *Edit Trend Measure* dialog box is displayed.
4. Edit the fields as required. For field and process descriptions, refer to Steps 4 - 8 from *Process Step - Creating a Trend Measure*.
5. Click **OK**.
6. Click **Refresh Report** to apply the changes.

Creating a % of, Rank, Running Sum Measure

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Right-click the measure you want to base your percentage of, rank, or running sum measure on.
3. Select **User Defined Measure > % of, Rank, Running Sum** from the menu. The *New % of, Rank, Running Sum, Etc.* dialog box is displayed.
4. Select one of the following radio buttons:
   - *% of* <*measure*>: Shows the percentage of each measure field value (how percentages are calculated depend on how the measure is configured; see below).

   Or

   - *Rank by* <*measure*>: Shows the rank of each measure field value (how ranks are calculated depend on how the measure is configured; see below).

   Or

   - *Running Sum of* <*measure*>: Shows the running sum of the measure field (how the sums are calculated depend on how the measure is configured; see below).

   Or

   - *% of Running Sum of* <*measure*>: Shows the percentage (of the running sum) of each measure field value (how the percentages are calculated depend on how the measure is configured; see below).
5. Click **Next**.
6. From the *Name* field, type a name for the new measure field.
7. From the *Format* field, select the required format for the type of measure field you are creating. For a description of each option, refer to Step 5 from *Process Step - Creating a Calculated Measure*. Generally, you can leave the value that has been selected by default (e.g., if you are creating a % of measure, the drop-down will default to Percentage).
8. From the *Decimal* field, select the number of decimal places that will be displayed for the measure field.
9. Select one of the following options:

   Note: For a description of each option below, click here. For an example of each option, click here.

   - If you selected % of <measure> in Step 4, select one of the following radio buttons:
     - Column (Grand Total Column is 100%)
     - Row (Grand Total Row is 100%)
     - Grand Total (Table Grand Total is 100%)
     - Each <level field filter> Column/Row Subtotal (Subtotal is 100%)

   Or

   - If you selected Rank By <measure> in Step 4, select one of the following radio buttons:
     - Rank Across Rows
     - Rank Across Columns
     - Rank Within <level field>

   Or

   - If you selected Running Sum <measure> in Step 4, select one of the following radio buttons:
     - Sum Across All Rows
     - Sum Across All Columns

- Break By <level field>

Or

- If you selected % of Running Sum <measure> in Step 4, select one of the following buttons:
  - Sum Across All Rows
  - Sum Across All Columns
  - Break By <level field>

10. Click **Done**.
11. Click **Refresh Report** to apply the changes.

Filters

Adding a Filter to a Level Field

Note: For information on filtering a measure field, refer to *Process Step - Adding a Top Ten Numeric Filter to a Report* or *Process Step - Adding a Greater/Less Than Numeric Filter to a Report*.

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. To add a filter to a level field:
   a) From the *Available Fields List*, *Layout* panel, or the report right-click the level field you want to filter.
   b) From the menu, select **Filter**. The *Filter on <field>* dialog box is displayed.
   c) Select one of the following options to locate the value you want to apply to the filter:
      - Select from the list of available values. Scroll up/down the list to locate the value(s) you want to filter. (To select multiple values at once, CTL+Click).

      Or

      - To match a specific string using the filter name, type the string you want to search for and click **Find**. The list is updated with the matching values.

   d) From the *Currently* drop-down, select Include or Exclude. This indicates whether the right hand column list shows field values that will be *included* in the report or *excluded* from the report. The field defaults to Include.
   e) Click the > arrow to move the highlighted value(s) to the right hand column. (You can also use the >> to move all values in the list to the right hand column, < to move a selected value from the right hand column to the left hand column, or << to move all values that are displayed from the right hand column to the left column).
   f) Click **OK** to apply the filter. The *Filter on <field>* dialog box closes.
3. Click **Refresh Report** to apply the changes.

Adding a Top Ten Numeric Filter to a Report

Note: For information on filtering a level field, refer to *Process Step - Adding a Filter to a Level Field*.

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. From the *Layout* panel or the report, right-click the field you want to filter (it is immaterial whether you select a level field or a measure field in this step since when you complete Steps 4 and 7, you are able to specify which combination of level field and measure field the numeric filter will apply to).
3. From the menu, select **Top Ten, Etc.** The *Numeric Filter* dialog box is displayed with the *Top Ten, Etc.* check box selected by default.
4. From the *Filter On* drop-down, select the level field that you want to apply the numeric filter to. Only fields that

have been added to the report are displayed from the list. For example, if you select Lead Provider, the report would show the top/bottom/x lead providers from the report. If the report contains only one level field, it is shown by default and the drop-down list is not displayed.

5 From the "Top" drop-down, select one of the following options:

Option	Description
Top	Include the top x values only in the report (e.g., the top ten lead providers by lead count).
Bottom	Include the bottom x values only in the report (e.g., the bottom ten lead providers by lead count).

6 From the text field, type the number of records you want to show in the report (e.g., type "5" to show the top five lead providers).

7 From the *By* drop-down, select the measure field you want to apply the filter to. You can choose a measure that has not already been added to the report (in which case, the measure is used for the numeric filter but is not added to the report).

8 Click **OK**.

9 Click **Refresh Report** to apply the changes.

Adding a Greater/Less than Numeric Filter to a Report

Note: For information on filtering a level field, refer to *Process Step - Adding a Filter to a Level Field*.

1 From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.

2 From the *Layout* panel or the report, right-click the measure field you want to filter (it is immaterial whether you select a level field or a measure field in this step since when you complete Steps 4 and 7, you are able to specify which combination of level field and measure field the numeric filter will apply to).

3 From the menu, select **Greater/Less Than, Equal To, Etc.** The *Numeric Filter* dialog box is displayed.

4 If it is not already selected by default, select the **Greater/Less Than, Equal To, Etc.** check box.

5 From the *Filter On* drop-down, select the level field that you want to apply the numeric filter to. Only fields that have been added to the report are displayed from the list.

6 From the first drop-down, select the measure you want to apply the filter to. You can add any measure from the list even if it has not been added to the report (in which case, the filter is applied to the measure but does not appear from the report).

7 From the next drop-down, select one of the following options:

Option	Description
Greater Than	The report will only show results that are greater than but not equal to x value (see Step 7).
Less Than	The report will only show results that are less than but not equal to x value (see Step 7).
Greater Than or Equals	The report will only show results that are greater than or equal to x value (see Step 7).
Less Than or Equals	The report will only show results that are less than or equal to x value (see Step 7).
Equals	The report will only show results that are equal to x value (see Step 7).
Not Equal To	The report will only show results that are not equal to x value (see Step 7).
Between	The report will only show results that are between x and y values (see Step 7).

8 From the text field, type the value(s) you want to apply to the above condition.

9 (If required) To add another condition, click **+ Add Condition** and repeat Step 6 - 7.

10 (If required) To remove a condition, click **x** beside the condition.

11 Click **OK**.

12 Click **Refresh Report** to apply the changes.

Removing or Modifying a Filter

1 From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.

2 (If required) To remove a filter, select one of the following options:

- For level and measure fields: If it is not already displayed, show the *Filters* panel by clicking  from the top of the report and then, beside the filter you want to remove, click **x**.

Or

- For measure fields:

a) From the *Layout* panel or the report, right-click the field and then select the type of numeric filter you want to remove (e.g., Greater/Less Than, Equal To, Etc.).

b) From the *Numeric Filter* dialog box, clear the required check box. For example, if you are removing a Greater/Less Than filter, clear the *Greater/Less Than, Equal To, Etc*. check box.

c) Click **OK**.

3 (If required) To modify a filter, select one of the following options:

- For a level field:
  - Right-click the field, select **Filter** from the menu, and then modify the filter as required. For more information, refer to *Process Step - Adding a Filter to a Level Field*.

Or

- From the report (in table or graph format), right-click the level field value that you want to modify the filter for and select one of the following options:

Note: When you update the filter per below, any filter that has already been assigned to the field will be replaced with the new filter.

Option	Description
Exclude	Exclude the selected value from the report and include all other filtered values for the field.
Keep Only	Keep only the selected value in the report and exclude all other values for the field.
Keep Only and Show <child field in hierarchy>	Keep only the selected value in the report and exclude all other filtered values for the field. This option also adds the associated "child" field (i.e., the field in the same hierarchy as the selected level field) to the report.
Show All	Show all values for the field in the report.

Or

- For a measure field, right-click the field, select the type of numeric filter you want to modify (e.g., Greater/Less Than), and then modify the filter as required. For more information on working with numeric filters, refer to *Process Step - Adding a Top Ten Numeric Filter to a Report* or *Process Step - Adding a Greater/Less Than Numeric Filter to a Report*.

4 Click **Refresh Report** to apply the changes.

Displaying Totals

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. To select the type of totals (i.e., subtotals and/or grand totals, depending on your selections in Steps 3 and/or 4 below) that can be displayed from the report, based on a particular measure field:
   a) Right-click the measure field(s) you want to display totals for in the report, and then select **Subtotals (Sums, Averages, Etc.)**. The *Average, Min, Max, Etc.* dialog box is displayed.
   b) Complete the following check boxes as required:

Check Box	Description
Aggregate (Shows as Total)	Select this check box to display the total value for the row and/or column. This option is selected by default when a measure field is added to a report. This option will be displayed as a "subtotal" and/or "grand total" depending on whether you complete Steps 3 and/or 4 below. (In most cases, a measure's inherent aggregator is sum; therefore, "aggregate" and "sum" below will typically be the same for a report).
Sum	Select this check box to display the summed value for the row and/or column. This option will be displayed as a "subtotal" and/or "grand total" depending on whether you complete Steps 3 and/or 4 below.
Average	Select this check box to display the average value for the row and/or column. This option will be displayed as a "subtotal" and/or "grand total" depending on whether you complete Steps 3 and 4.
Min	Select this check box to display the minimum value for the row and/or column. This option will be displayed as a "subtotal" and/or "grand total" depending on whether you complete Steps 3 and/or 4 below.
Max	Select this check box to display the maximum value for the row and/or column. This option will be displayed as a "subtotal" and/or "grand total" depending on whether you complete Steps 3 and/or 4 below.

   c) Click **OK**.
3. To display "subtotals" [the type of subtotals that will be shown on the report depends on your selection(s) in Step 2 above] for a level field, right-click the level field and from the menu select **Show Subtotals**.

   Note: The Show Subtotals menu option is only available for a level field if the row or column contains more than one field. If only one level field has been added to a report row or column, when you right-click the field, Show Subtotals will be grayed out in the menu (likewise, this option is also grayed out if you select the last field in the row or column list).
4. To display "grand totals" for rows and/or columns [the type of grand totals that will be shown on the report depends on your selection(s) in Step 2 above]:
   a) Click  and select **Report Options**. The *Report Options* dialog box is displayed.
   b) Complete the following check boxes as required:

Check Box	Description
Show Grand Totals for Rows	Select this check box to display the sum of the rows' values on the report. By default, this option is selected.
Show Grand Totals for Columns	Select this check box to display the sum of the columns' values on the report. By default, this option is selected.
Also Display Totals that Include Filtered Out Values	Select this check box to include values that have been filtered out of the report in the total calculations.

   c) Click **OK**.
5. Click **Refresh Report** to apply the changes.

Sorting Data

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. If sorting level field values, from the report right-click the row or column header and select Sort A > Z or Sort Z > A to sort the row/column in ascending or descending order alphabetically.

   Note: You can apply different sort orders to a row and column since one does not impact the other. For example, you could sort the Lead Provider column in ascending order and the Disposition row in descending order. However, you cannot assign multiple sort orders to columns or rows; the last sort order that is applied to a row or column will replace the previously selected sort order.
3. Click **Refresh Report** to apply the changes.

Modifying Report Appearance and Exporting

Applying Conditional Formatting

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. From the report, right-click the measure field you want to apply conditional formatting to and select **Conditional Formatting**.
3. Select one of the following options:

Option	Description
Color Scale - Green Yellow Red	Applies gradient coloring to the measure values in ascending order in green, yellow, and red (i.e., the lowest values are shown in green and the highest values are shown in red).
Color Scale - Red Yellow Green	Applies gradient coloring to the measure values in ascending order in red, yellow, and green (i.e., the lowest values are shown in red and highest values are shown in green).
Color Scale - Blue Yellow Red	Applies gradient coloring to the measure values in ascending order in blue, yellow, and red (i.e., the lowest values are shown in blue and highest values are shown in red).
Color Scale - Red Yellow Blue	Applies gradient coloring to the measure values in ascending order in red, yellow, and blue (i.e., the lowest values are shown in red and highest values are shown in blue).
Data Bar - Red	Applies a red data bar to each measure value, relative to the other measure values (i.e., the lowest values are shown with a low data bar and the highest values are shown with a high data bar).
Data Bar - Green	Applies a green data bar to each measure value, relative to the other measure values (i.e., the lowest values are shown with a low data bar and the highest values are shown with a high data bar).
Data Bar - Blue	Applies a blue data bar to each measure value, relative to the other measure values (i.e., the lowest values are shown with a low data bar and the highest values are shown with a high data bar).
Trend Arrow - Green Red	Applies a green, upward facing arrow to a measure value that is an "increase" from the previous report value (e.g., from the previous month or week) and a red, downward facing arrow to a measure value that is a "decrease" from the previous report value.
Trend Arrow - Red Green	Applies a red, upward facing arrow to a measure value that is an "increase" from the previous report value (e.g., from the previous month or week) and a green, downward facing arrow to a measure value that is a "decrease" from the previous report value.

4. Click **Refresh Report** to apply the changes

Editing a Measure Field Name and Column Format

Note: For information on editing the name of a level field, refer to *Process Step - Renaming a Level Field and Assigning a Plural Name*.

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. From the *Layout* panel or the report, right-click the measure field and select **Column Name and Format**. The *Edit Column* dialog box is displayed.
3. Complete the following fields as required:

Field	Description
Name	Type the modified name for the measure field/column heading.
Format	Select one of the following formats for the measure value: • *Default*: Value is displayed as a number without decimal places (e.g., 100) • *General Number*: Value is displayed as number (e.g., 100.00) • *Currency*: Value is displayed as a $ currency (e.g., $100.00) • *Percentage*: Value is displayed as a percentage (e.g., 50.00%) • *Expression*: Value is displayed according to the MDX format expression provided in the *MDX Format Expression* field. The expression defaults to the measure field expression but can be modified as required.
Decimal Places	Type the number of decimal places to be displayed for the measure value (if required per the format selected above).

4. Click **OK**.
5. Click **Refresh Report** to apply the changes.

Freezing Panes in a Report Table

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Click  and select **Report Options**. The *Report Options* dialog box is displayed.
3. Select the following check box(es) as required:
   - Select the **Freeze Column Headers** check box to freeze the column headings when you are scrolling vertically in the report.
   - Select the **Freeze Row Labels** check box to freeze the row headings when you are scrolling horizontally in the report.
4. Click **OK**.
5. Click **Refresh Report** to apply the changes.

Resetting a Report and Column Sizes

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Click  and select one of the following options:
   - Select **Reset Report** to revert the report to its original state. Because you cannot save a report in this version of the application, when you click Reset Report the report is returned to a blank workspace.

   Or

   - Select **Reset Column Sizes** to revert the columns to their last sizing. For example, if you expand the columns and then select Reset Column Sizes, the columns return to their pre-expanded sizes.

Formatting Blank Cells

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Click  and select **Report Options**. The *Report Options* dialog box is displayed.
3. Complete the following as required:
   - From the *In Blank Measure Cells, Show* field, type the value or character that should be displayed from the report when a measure value is null. For example, you may want all null values to appear as "-" or "0".
   - Select the **Also Show Rows/Columns where the Measure Cell is Blank** check box for the report to display a row or column even when a measure value is blank. If this check box is not selected, rows and columns (i.e., level field values) will not appear on the report when their measure value is null.
4. Click **OK**.
5. Click **Refresh Report** to apply the changes.

Displaying a Report in Graph Format

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Click  to toggle the report from table format to graph format. The report is displayed as the last selected graph type.
3. (If required) To change to a different type of graph, click the down arrow () beside  and select the graph format from the list. For a description of each graph type, click here.

   Note: To toggle from graph format to table format, click  .
4. Click **Refresh Report** to apply the changes.

Hiding/Showing a Measure Field from a Graph

Note: You must have at least one measure field showing for a graph, otherwise the graph will not have data to display.

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Select one of the following options:
   - To hide a measure field, from the *Layout* panel or the report (table format) right-click the measure field that you want to hide from the graph and select **Hide from Chart**. When you toggle to graph format, the measure will not be shown in the report. (The Hide from Report menu option toggles to Show from Report).

     Note: When you hide a field and toggle to graph format, the *Layout* panel will not show the measure that has been hidden from the graph.

   Or

   - To show a measure field, from the *Layout* panel or report (table format), right-click the measure field that you want to show from the graph and select **Show on Chart**. When you toggle to graph format, the measure will be shown in the report. (The Show from Report menu option toggles to Hide from Report).
3. Click **Refresh Report** to apply the changes.

Exporting a Report (from Table Format)

Note: When you export a report to CSV format, the report data is exported but not the report formatting.

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. From the report in table format, at the top of the report click  .

3. Select **Export** and then select To PDF, To Excel, or To CSV depending on which file format you want to export the report to.
4. Depending on the format you selected in the previous step, select one of the following options:
    a) From the *Export to PDF* dialog box, select the page format and orientation of the export file.
    b) Click **Export**. The report is exported to a PDF file in a separate browser window.

    Or

    a) From the *Export to Excel* dialog box, select the page format, orientation, and scaling.
    b) Click **Export**. The report is exported to a Excel file (follow the prompts from your browser to open the file).

    Or

    a) From the *Export to CSV* dialog box,select whether you want to include subtotals and keep measure formatting.
    b) Click **Export**. The report is exported to a CSV file (follow the prompts from your browser to open the file).

Viewing "About" Information

Viewing Report Information

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. From the top of the report, click  .
3. From the menu, select **About this Report**. A pop-up dialog box displays the following information:

Field	Description
Description	A description of the report.
Date Created	The date and time the report was created.
Date Modified	The date and time the report was last changed.
Modified By	The user who last modified the report.
Based on Cube	Education Leads Sparkroom; this is the schema that is used for Analytics reports.
Based on Data as of	The date and time the report data was last updated (this is based on how frequently report data is updated in the Analytics database, typically every 15 minutes).

4. Click **x** to close the dialog box.

Viewing Field Information

1. From the navigation menu, select **Analyzer Views > Analyzer Tool** or **Analyzer Views > Advanced Analyzer Tool**, depending on whether you want to use the basic or advanced schema. The *Analyzer Tool* opens.
2. Right-click the field you want to view information about and select **Tell me About**. The *About <field name>* dialog box displays the following information:

Field	Description
Name	The name of the field.
Type	The type of field (e.g., level, measure).
Description	A description of the field.
MDX	The MDX expression the field is based on.

3. Click **OK**.

Using the Lead Inquiry Screen (Processed Leads)

Searching for and Viewing Processed Leads

1. From the navigation menu, select **Operations > Lead Inquiry**. The *Lead Inquiry* screen is displayed.
2. Complete the following fields, as required:

Note: For performance reasons, if you choose an option from the *Date Range* field that is other than "Received Date" not all criteria described in the table below may be available for selection.

Field	Description
Date Range	a) From the first drop-down, select the type of data you want to specify for the inquiries (this conversion data is imported from the buyer CRM system): ○ *No date constraint* – No date range will be specified for the search criteria. ○ *Received Date* – Date the lead was received by Sparkroom. The field defaults to this selection. ○ *Made Bad Date* – Date the lead verification status was manually changed to "bad". For example, an inquiry may be processed by the application and marked "good", but if the admissions team is unsuccessful in contacting the applicant, they may choose to change the inquiry status to "bad" so it will no longer be followed up on. b) From the second drop-down, select the date range: ○ *Absolute* (for this selection, specify start and end dates for the desired time period) ○ *Today* ○ *Yesterday and Today* ○ *Yesterday* ○ *Last Two Days* ○ *Week-to-Date* ○ *Month-to-Date* ○ *Last Thirty Days* ○ *Last Month* ○ *Custom* [this option will allow you to choose a relative date period (i.e., a time period relative to today) below]. c) If you chose "custom" above, select one of the following relative date types from the *Relative* drop-down: ○ *Days*: The custom range will be in days. You must select the starting/ending days for your relative time period (e.g., from 9 days ago until 4 days ago). ○ *Weeks*: The custom range will be in weeks. You must select the starting/ending weeks for your relative time period as well as the day of the week (e.g., from Monday 3 weeks ago until Thursday 1 week ago). ○ *Months*: The custom range will be in months. You must select the starting/ending months for your relative time period as well as the day of the month (e.g., from the 19th 3 months ago until the 5th 2 months ago). For any of the above custom date range options, select the *Exclude Today* check box if you do not want to include today's inquiries in the search. (Based on your custom date range selection, the start/end date fields are automatically updated).
LMS ID(s)	Type the LMS ID you want to use in your search results (this is the primary lead ID used by the application).
Lead Providers/Channels	Select the check box beside each lead provider and channel you want to include in your search results.
Lead Buyers/Requested Campus	Select the check box beside each lead buyer and requested campus you want to include in your search results.
Lead Verification	Select the response codes for the inquiries you want to include in your search results. Click the arrow to view all selections in the field, and then select one of

	the following radio buttons: ○ *All Leads*: Search for all inquiries, regardless of verification status. ○ *All Good Leads*: Search for good inquiries only. ○ *All Bad Leads*: Search for bad inquiries only. ○ *Specific Verification Statuses*: Select and move the response codes you don't want to include in your search to the *Exclude* column. By default, all statuses are included. **Note:** While verification status codes are the internal codes assigned by the application during lead processing, response codes are the codes assigned to inquiries by the application and made visible to the lead provider. Certain verification and response codes may be the same, although this is not always the case. See this table for a description of available response codes.
Applicant First Name(s)	Type the applicant first names you want to include in your search results, comma separated.
Applicant Last Name(s)	Type the applicant last names you want to include in your search results, comma separated.
Email Address(es)	Type the applicant email addresses you want to include in your search results, comma separated.
Universal Lead ID(s)	Select whether to include all inquiries with and without universal lead IDs, only inquiries with universal lead IDs, or inquiries with the specified universal lead IDs (comma separated). LeadiD is a third party software that tracks inquiry origin and history.
Phone Number	Type the starting values of the applicant phone numbers you want to include in your search results, comma separated.
Program(s)	Select the check box beside each program you want to include in your search results. Click the arrow to view all selections in the field; by default, all programs are selected.
Requested Degree Type	Click the arrow to view all selections in the field, and then select and move the degree types you don't want to include in your search to the *Exclude* column. By default, all degree types are included.
Sparkroom Lead IDs	Type the alternate lead IDs you want to include in your search results. This field is used for legacy system where an inquiry uses an identifier other than the LMS ID.
Applicant City	Type the applicant city you want to include in your search criteria.
Applicant State/Province	Type the applicant state or province you want to include in your search criteria.
Applicant Zip Code	Type the applicant zip code, postal code, SCF, or FSA you want to include in your search criteria.
Lead Providers/Sources	
Captured Lead Status	Select whether the inquiry was captured via a form post to lead capture scripts (i.e., select Yes) or through another mechanism such as a batch upload (i.e., select No). To display all inquiries regardless of their captured status, select All.
Billable Lead Status	Select whether you want to display billable inquiries (i.e., select Yes), non-billable leads (i.e., select No), or all inquiries regardless of their billable status (i.e., select All).
Target Groups	Select the check box beside each target group you want to include in your search results. Click the arrow to view all selections in the field; by default, all target groups are selected.
Search Term	Type all or some of the letters contained in the search terms used to generate the inquiry, if it is an inquiry originating from a search engine marketing campaign.
Contact Method	Type all or some of the letters contained in the name of the contact method used for the inquiries you want to include in your search results. For example, to include all inquiries pertaining to the contact method "digital marketing", you could type "digital".
Lead Provider Affiliate	Type the starting letter(s) of the affiliate(s) you want to include in your search results. For example, you may want to include all affiliates starting with "A".
Call Center Disposition	Click the arrow to view all selections in the field, and then select and move the call center dispositions you don't want to include in your search to the *Exclude* column. By default, all call center dispositions are included.

3 Click **Search**. The Results Panel appears, displaying the inquiries matching your search criteria. The following information is displayed for each inquiry (you can click a column heading to sort the data by that column):

Field	Description
Sparkroom ID	The unique internal database pointer for a inquiry. (This field is not generally used since the LMS ID is used more often to identify and search for a inquiry in the system).
LMS ID	The primary lead ID used by the Sparkroom application.
Lead Provider	The lead provider who sent the inquiry.
Lead Buyer	The lead buyer who received the inquiry.
Email Address	The email address of the applicant.
First Name	The first name of the applicant.
Last Name	The last name of the applicant.
State/Province	The state or province where the inquiry originated from.
Received Date	The date the inquiry was received by Sparkroom.
Requested Program	The program requested in the inquiry.
Target Group	The target group the inquiry was applied to.
Requested Division	The division requested in the inquiry.
Requested School	The school requested in the inquiry.
Requested Campus	The campus requested in the inquiry.
Requested Degree Type	The degree type requested in the inquiry.
Billable	Whether the inquiry was billable or non-billable to the lead buyer.
Verification	The verification status (i.e., response code) given to the inquiry. Click here for a definition of each code.
Lead Provider Channel	The lead provider channel the inquiry was received from.

4 (Optional) Click **Reset Criteria** to return the search fields to their default values.

Saving a Lead Inquiry View

1 Complete Steps 1 - 3 from *Process Step - Searching for and Viewing Processed Leads*.

2 Select one of the following options:

- Click **Save View** to save the view using its existing name. (If the view is in use by another user, or you are attempting to save the template, you will be prompted to save the view using a unique name).

Or

- Click **Save View As** to save the view using a new name. The *Save As* dialog box is displayed from where you can type the view name into the field and then click **OK**. The view becomes available from the *View* drop-down and is selected by default.

Once saved, the lead inquiry view becomes available from the *View Management* screen (see *Viewing View Management* for more information).

Viewing Lead Details

Once you have generated the search results (see *Process Step: Searching for and Viewing Processed Leads*), from the *LMS ID* column click the ID of the inquiry you want to view details for. This takes you to the *Lead Details* screen where the following information is displayed from the Summary Panel:

Field	Description
Lead Provider	The vendor who provided the inquiry to the lead buyer.
Lead Buyer	The bead buyer who received the inquiry.
Lead Provider Lead ID	the lead provider's reference for the inquiry.
LMS ID	The main inquiry reference number used internally by the Sparkroom application.
Sparkroom ID	The internal reference identifying the inquiry.
Campaign	The lead provider campaign which generated the inquiry.

Advertising Key	An additional identifier given to the inquiry.
Received Date	The date the inquiry was received by the Sparkroom application.
Affiliate	The lead provider affiliate associated with the inquiry, if any.
Lead Provider Channel/Channel Type	The lead provider channel the inquiry was received from. The channel type describes what kind of channel it is, such as "direct linker", "form poster", "call center", etc., which generally describes how the inquiry was generated.
Lead Provider Source	The lead provider's marketing source for the inquiry, such as search terms or a pay-per-click campaign.
Verification	The verification status of the inquiry (i.e., "good" or "bad") based on lead processing results.

In addition, the following tabs contain further information about the inquiry and applicant:

- *Lead Summary*
- *Fees*
- *History*
- *Call Center Disposition*
- *Compliance*
- *Other*

Exporting Search Results

1. Complete Steps 1 - 3 from *Process Step - Searching for and Viewing Processed Leads*.
2. Click **Export**. The *Lead Inquiry Export* dialog box is displayed.
3. Select the *CSV* or *XLS* radio button depending on whether you want to export the inquiries to a .csv or .xls file respectively.
4. From the *Include* column, select the column(s) you do not want to include in the exported file and click the > arrow to move to the *Exclude* column.

   Note: Which columns are exported for inquiries is configured from the lead provider's company settings via Company Administration > Company Configuration (from the *Lead Export Fields* section).
5. From the *Date Formatting* field, select the date format you want to use for the export file. From the drop-down, select one of the available options; the right hand field becomes populated with the details of that selection. The default date format is MMM dd, yyyy hh:mm:ss a.

   Note: You can click the ? icon to view a pop-up window with detailed descriptions of each format option.
6. (If required) Select the **Save to the Current View** check box to save these settings to your current view.

   Note: Since the default view cannot be modified, if you are currently working in the default view, this check box will be non-editable and you must save a copy of the view and then re-export (see *Process Step - Saving a Lead Inquiry View*).
7. Click **Export** and then follow the prompts to open the file, from where you can view, print, save, etc. the results.

Using Reports

Running the Bad Lead Report

1. From the navigation menu, select **Operations > Reports**. The *Reports* screen is displayed.
2. Select **Bad Lead Report**. The *Report Parameters* screen is displayed.
3. From the *Date* drop-down, select one of the following options:

Option	Description
Absolute	Select a time period for the report using the start and end calendar fields beside the drop-down. This option allows you to determine a "frozen" date period for the data (e.g., April 1 - 15) rather than a date period that is relative to the current date.

Yesterday and Today	Run the report using data from today and yesterday, relative to the current date
Yesterday	Run the report using data from yesterday, relative to the current date.
Last Two Days	Run the report using data from the last two days, relative to the current date.
Week-to-Date	Run the report using data from the current week. For example, if the current day is Wednesday, data from Sunday to Wednesday would be included in the report.
Month-to-Date	Run the report using data from the current month up until the current date. For example, if the current date is April 15, data from April 1 to April 15 would be included in the report.
Last Thirty Days	Run the report using data from the last thirty days, relative to the current date.
Last Month	Run the report using data from the previous month, relative to the current month. For example, if the current date is April 15, data from March 1 to March 31 would be included in the report.

4. From the *Lead Buyer* field, drill down and select the check box beside the lead buyer(s) you want to include in the report.
5. From the *Lead Provider Channel* field, drill down and select the check box beside the lead provider channel(s) you want to include in the report.
6. From the *Verification Status* field, select the verifications status(es) you do not want to include in the report and click > to move it/them from the *Include* column to the *Exclude* column. By default, all verification statuses are included in the report.
7. Click **OK**. This takes you to the *Bad Lead Report* screen which displays the results in HTML format.
8. (Optional) To export the report to PDF, XLS, or CSV format, click Export to PDF, Export to XLS, or Export to CSV respectively and then follow the prompts as required.

Running the Error Log Report

1. From the navigation menu, select **Operations > Reports**. The *Reports* screen is displayed.
2. Select **Error Log Report**. The *Report Parameters* screen is displayed.
3. From the *Date* drop-down, select one of the following options:

Option	Description
Absolute	Select a time period for the report using the start and end calendar fields beside the drop-down. This option allows you to determine a "frozen" date period for the data (e.g., April 1 - 15) rather than a date period that is relative to the current date.
Yesterday and Today	Run the report using data from today and yesterday, relative to the current date
Yesterday	Run the report using data from yesterday, relative to the current date.
Last Two Days	Run the report using data from the last two days, relative to the current date.
Week-to-Date	Run the report using data from the current week. For example, if the current day is Wednesday, data from Sunday to Wednesday would be included in the report.
Month-to-Date	Run the report using data from the current month up until the current date. For example, if the current date is April 15, data from April 1 to April 15 would be included in the report.
Last Thirty Days	Run the report using data from the last thirty days, relative to

	the current date.
Last Month	Run the report using data from the previous month, relative to the current month. For example, if the current date is April 15, data from March 1 to March 31 would be included in the report.

4 From the *IDs* field, type the error IDs you want to include in the report, comma separated. By default, this field is blank which returns all errors generated during the specified date range.

5 From the *Show Detail* drop-down, select Yes or No to indicate if you want to include the error message detail in the report. This field defaults to Yes.

6 From the *Error Code Filter* field, select the error code(s) you want to include in the report. By default, all error codes are included; to remove an error code, select it and then click > to move it to the *Exclude* column.

7 Click **OK**. This takes you to the *Error Log Report* screen which displays the results in HTML format.

8 If required, export the report to PDF, XLS, or CSV format by clicking Export to PDF, Export to XLS, or Export to CSV respectively.

Running the Ping and Post Report

1 From the navigation menu, select **Operations > Reports**. The *Reports* screen is displayed.

2 Select **Ping and Post Report**. The *Report Parameters* screen is displayed.

3 From the *Date* drop-down, select one of the following options:

Option	Description
Absolute	Select a time period for the report using the start and end calendar fields beside the drop-down. This option allows you to determine a "frozen" date period for the data (e.g., April 1 - 15) rather than a date period that is relative to the current date.
Yesterday and Today	Run the report using data from today and yesterday, relative to the current date
Yesterday	Run the report using data from yesterday, relative to the current date.
Last Two Days	Run the report using data from the last two days, relative to the current date.
Week-to-Date	Run the report using data from the current week. For example, if the current day is Wednesday, data from Sunday to Wednesday would be included in the report.
Month-to-Date	Run the report using data from the current month up until the current date. For example, if the current date is April 15, data from April 1 to April 15 would be included in the report.
Last Thirty Days	Run the report using data from the last thirty days, relative to the current date.
Last Month	Run the report using data from the previous month, relative to the current month. For example, if the current date is April 15, data from March 1 to March 31 would be included in the report.

4 Click **OK**. This takes you to the *Ping and Post Report* screen which displays the results in HTML format.

5 (Optional) To export the report to PDF, XLS, or CSV format, click Export to PDF, Export to XLS, or Export to CSV respectively and then follow the prompts as required.

Running the Pricing Report

1. From the navigation menu, select **Operations > Reports**. The *Reports* screen is displayed.
2. Select **Pricing Report**. The *Report Parameters* screen is displayed.
3. From the *Effective Date* field, select the effective date for the lead buyer's pricing information you want to display from the report.
4. From the *Lead Buyer* field, drill down and select the check box beside the lead buyer(s) you want to include in the report.
5. Click **OK**. This takes you to the *Pricing Report* screen which displays the results in HTML format.
6. (Optional) To export the report to PDF, XLS, or CSV format, click Export to PDF, Export to XLS, or Export to CSV respectively and then follow the prompts as required.

Running the User Activity Report

1. From the navigation menu, select **Operations > Reports**. The *Reports* screen is displayed.
2. Select **User Activity Report**. The *Report Parameters* screen is displayed.
3. From the *Date* drop-down, select one of the following options:

Option	Description
Absolute	Select a time period for the report using the start and end calendar fields beside the drop-down. This option allows you to determine a "frozen" date period for the data (e.g., April 1 - 15) rather than a date period that is relative to the current date.
Yesterday and Today	Run the report using data from today and yesterday, relative to the current date
Yesterday	Run the report using data from today, relative to the current date
Last Two Days	Run the report using data from the last two days, relative to the current date.
Week-to-Date	Run the report using data from the current week. For example, if the current day is Wednesday, data from Sunday to Wednesday would be included in the report.
Month-to-Date	Run the report using data from the current month up until the current date. For example, if the current date is April 15, data from April 1 to April 15 would be included in the report.
Last Thirty Days	Run the report using data from the last thirty days, relative to the current date.
Last Month	Run the report using data from the previous month, relative to the current month. For example, if the current date is April 15, data from March 1 to March 31 would be included in the report.

4. From the *Show Details* drop-down, select whether to include user activity details in the report.
5. From the *User Name* field, type the name(s) of the user(s) you want to include in the report, comma separated. This field defaults to blank, which returns all user activity for the specified date range.
6. Click **OK**. This takes you to the *User Activity Report* screen which displays the results in HTML format.
7. If required, export the report to PDF, XLS, or CSV format by clicking Export to PDF, Export to XLS, or Export to CSV respectively.

Saving a Report View

1. Open and select criteria for the report you want to save. For example, if you are saving the Error Log Report as a view, complete Steps 1-6 from *Process Step - Running the Error Log Report*.
2. Select one of the following options:
   - Click **Save View** to save the report as a view using its existing name. (If the view is in use by another user, or you are attempting to save a report template, you will be prompted to save it using a unique name).

   Or

   - Click **Save View As** to save the report as a view using a new name. The *Save As* dialog box is displayed from where you can type the view name into the field and then click **OK**. The view becomes available from the *View* drop-down and is selected by default.

   Once saved, the report view becomes available from the *View* drop-down on the *Report Parameters* screen for the selected report; when you select the view, the saved selection criteria/report parameters are displayed.

   In addition, once saved, the report view becomes available from the *View Management* screen (see *Viewing View Management* for more information) with the selection criteria you have specified for the view.

Using View Management (Lead Inquiry, Report, Dashboard, Pivot)

Selecting a View

Note: You can also select a view from the respective Lead Inquiry, Reports, Pivot Analysis Tool, or Dashboard screens.

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the view you want to open.
3. Select the view.

Renaming a View

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the view you want to rename.
3. From the *Actions* column, select **Rename**. The *Rename View* dialog box is displayed.
4. Type the new view name into the field and then click **OK**. The dialog box closes and the screen refreshes with the new name displayed.

Deleting a View

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the view you want to delete.
3. From the *Actions* column, select **Delete**. A confirmation dialog box is displayed.
4. Click **OK**. The dialog box closes and the view is deleted.

Making a View Searchable

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the view you want to make searchable to other users.
3. From the *Actions* column, select **Make Searchable**. A confirmation dialog box is displayed.
4. Click **OK**. The dialog box closes and the view becomes searchable to other users (the Make Searchable button also toggles to Make Unsearchable if you want to reverse this process).

Sharing a View

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the view you want to share with other users.
3. From the *Actions* column, select **Sharing**. The *Share View with Users* dialog box is displayed.
4. Select the check box beside each user you want to share the view with and then click **OK**. A confirmation dialog box is displayed.
5. Click **OK**. The dialog box closes and the view becomes shared with the selected users.

Scheduling a View for Export

Note: All exports begin at 12:01 a.m. on the scheduled date.

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the view you want to schedule for export.
3. From the *Actions* column, select **Configure Schedule**. The *Schedule <view name> View* dialog box is displayed.
4. Select one of the following options:
   - To schedule the export for a single date only, select the **Once on a Specific Date** radio button and then select the date and time from the *Date* field.

   Or

   - To schedule a recurring export, select the **Recurring** radio button, complete the *Hour of Day* field to specify the time you want the view to be exported each day, and then select one of the following options (and complete the required information) from the *Recurring Options* section:

Option	Description
Every Day	Run the export every day.
Every Weekday	Run the export Monday to Friday.
Every x Day(s)	Run the export every x number of days (e.g., every two days).
Every x Weeks on Days	Run the export every x number of weeks on x day(s) during the week. For example, every second week in the month on Monday, Tuesday, and Wednesday.
Every x Day of Month	Run the export every x day of the month (e.g., every tenth day).

5. To specify the export format you require, select the *PDF*, *CSV*, or *XLS* check box as required.
6. To include the date and time details in the export file, select the **Append Date-Time** check box.
7. From the *Export File* Name field, type a name for the export file.
8. To specify the type of export you require, select one or both of the following options as required:
   - To export the view via email, select the **Email** check box, select the *Email Empty Result Set* check box if you want to send the email even when the data set is null, and then complete the *Email File Size Limit*, *Email Subject*, *Email Body*, and *Distribution List* fields as required.

     Note: If required, you can create a distribution list for the email export via the Create New Distribution List button. You would complete the *Name*, *Description*, and *Email Addresses* fields (multiple email addresses must be comma or semi colon separated).

     Note: If selecting a distribution list, you can hover your mouse over the distribution list name to view the email addresses that are included in the list.

   And/Or

   - To export the view via FTP, select the **FTP** check box, complete the additional fields as required, and then click **Test FTP Credentials** to verify the FTP details provided.

9. Click **Save**. The *Schedule <view name> View* dialog box closes and a check mark is displayed from the *Scheduled* column for the view.

Removing a Scheduled Export

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the view you want to remove the schedule for.
3. From the *Actions* column, select **Remove Schedule**. A confirmation dialog box is displayed.
4. Click **OK**. The dialog box closes and the scheduled export is removed for the view.

Emailing a View

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the view you want to email to yourself.
3. From the *Actions* column, select **Email Me Now**. A confirmation dialog box is displayed, notifying you that the export is being generated and will be emailed to your email address (as provided in your user profile) once it is completed.

Creating a View (Dashboard)

Note: This feature is only available for dashboard views.

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, locate the type of dashboard view you want to create.
3. Click **Create New View**. The *Configuration* dialog box is displayed.
4. Complete the necessary information to configure the dashboard view. Refer to the *Process Step - Creating and Configuring a Dashboard View* for details.
5. Click **Save View As** to save the view using a unique name. The *Save As* dialog box is displayed from where you can type the view name into the field and then click **OK**. A confirmation dialog box is displayed.
6. Click **OK**. The view becomes available from the *View Management* screen.

Configuring an Existing View (Dashboard)

Note: This feature is only available for dashboard views.

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the dashboard view you want to configure.
3. Click **Configure**. The *Configuration - <view name>* dialog box is displayed.
4. Complete the necessary information to configure the dashboard view. Refer to the *Process Step - Creating and Configuring a Dashboard View* for details.
5. Select one of the following options:
   - Click **Save View** to save the view using its existing name and then click **OK** from the confirmation dialog box.

   Or

   - Click **Save View As** to save the view using a unique name. The *Save As* dialog box is displayed from where you can type the view name into the field. Click **OK** and then, from the confirmation dialog box, click **OK**.

Showing a View in Your Navigation Menu

Note: You can only add views to your navigation menu that you have created (i.e., views that are available under My Views); you cannot add views which another user has created (i.e., views that are available under Public Views).

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. From the *View Name* column, drill down to locate the view.
3. From the *Show in Navigation Menu* column, select the check box. The view becomes available from the navigation menu under the appropriate heading.

Finding and Adding a View

1. From the navigation menu, select **View Management > View Management**. The *View Management* screen is displayed.
2. Click **Find and Add Views**. The *Find and Add Views* dialog box is displayed, showing views created by other users which are available for you to add to your list. If there are no views available, the message *"there are no additional searchable views to select"* is displayed.

   Note: In order for a view to be available for you to "find and add", the user who created the view must make the view searchable; otherwise, it will not appear in the dialog box list. (By contrast, if a user shares a view with you, it will automatically appear from your list of available views without you having to add it).
3. Select the check box beside the view you want to add and then click **OK**.
4. From the confirmation dialog box, click **OK**. The dialog box closes and the view is added to your list.

Using the Delivery Monitor (Unprocessed Leads)

Searching for and Viewing Unprocessed Leads

1. From the navigation menu, select **Interfaces > Delivery Monitor**. The *Delivery Monitor* screen is displayed.
2. Complete the following fields, as required:

Field	Description
Received	Select the start and end dates and times for the period you want to include in your search results. This field defaults to the current date. The date range should be no more than 31 days.
Lead Buyer(s)	Select the lead buyers you want to include in the search results.
First Name(s)	Type the applicant first names you want to include in your search results, comma or line separated.
Last Name(s)	Type the applicant last names you want to include in your search results, comma or line separated.
LMS Reference(s)	Type the Sparkroom-assigned lead reference IDs you want to include in your search results, comma or line separated.
Email(s)	Type the applicant email addresses you want to include in your search results, comma or line separated.
Branch Reference	Type the branch reference codes for the campuses you want to include in your search results (this field is typically used by a legacy system to identify a campus).
CID	Type the lead provider and lead buyer channel identifiers. The Provider CID is the channel identifier for the lead provider's channel; for example, Vendor X's Call Center channel may be identified by CID "1332".
Test Criteria	Select the type of inquiries you want to include in the search results; this field is useful for testing purposes. You can select All Captured Leads, Non-Test Leads Only (i.e., live inquiries), or Test Leads Only (i.e., test inquiries only). The field

	defaults to All Captured Leads.
Response Code	Select the response codes for the inquiries you want to include in your search results. Click the arrow to view all selections in the field, and then select one of the following radio buttons: ○ *All Leads*: Search for all inquiries, regardless of verification status. ○ *All Good Leads*: Search for good inquiries only. ○ *All Bad Leads*: Search for bad inquiries only. ○ *Specific Verification Statuses*: Select and move the response codes you don't want to include in your search to the *Exclude* column. By default, all statuses are included. **Note:** While verification status codes are the internal codes assigned by the application during lead processing, response codes are the codes assigned to inquiries by the application and made visible to the lead provider. Certain verification and response codes may be the same, although this is not always the case. See this table for a description of available response codes.

3 Click **Search**. The Summary Panel and the Results Panel appear: the former displays the number of inquiries matching your search criteria for each column described below, while the latter (which defaults to *Captured Leads*) displays detailed inquiry information filtered by the selected column. The following information is displayed from the Summary Panel:

Field	Description
Total Leads Captured	The total number of matching inquiries. By default, lead details displayed from the *Captured Leads* panel are filtered by this column.
Rejected Leads	The number of inquiries for which a rejection response was sent to the lead provider because a validation rule did not pass. This is due to an error in the post or school-specific rules. If desired, you can filter the inquiry details displayed from the *Captured Leads* panel by this column.
Resubmitted	The number of inquiries resubmitted to the system. For example, an inquiry may need to be resubmitted for processing if the verification status was changed from "bad" to "good".
Test Leads	The number of inquiries sent to the test URL. This is useful when activating new inquiry sources.

The following information is displayed from the Results Panel:

Field	Description
Lead Buyer	Lead buyer who received the inquiry.
ID	Lead capture log ID. You can click this ID to view details about the lead capture event in order to help troubleshoot lead capture issues.
Interface	The interface which the inquiry was posted to (i.e., a URL dedicated to the lead buyer which essentially executes the buyer's lead capture script).
Received Date	Date and time the inquiry was received by the application.
Result	Response action by the application when the inquiry was received (e.g., rejected).
Provider CID	The identifier for the lead provider's channel.
LMS Reference	Primary lead ID assigned by the application (used internally by the lead buyer).
Name	Applicant's name provided on the inquiry.
Email	Applicant's email address provided on the inquiry.
Campus Name	Campus name provided on the inquiry.

Program Name	Program name provided on the inquiry.
Branch Reference	Branch reference code for the campus (this field is typically used by a legacy system to identify a campus).
Test	Indicates (using Y or N values) whether the inquiry was part of application testing.
Response Code	Sparkroom response code assigned to the inquiry and provided to the lead provider.
Website	Website where the inquiry originated from.
Actions	Select one of the available options to view additional inquiry details or raw inquiry data (see *Process Step: Viewing Lead Details or Raw Lead Data* for details).

4 (If required) To filter the Results Panel by rejected inquiries (as opposed to captured inquiries), select the link from the *Rejected Leads* column. The Results Panel is updated with the new filter.

Viewing Lead Details or Raw Lead Data

Once you have generated the search results (see *Process Step: Searching for and Viewing Unprocessed Leads*), from the *Captured Leads* panel select one of the following options from the *Actions* column:

- To view raw inquiry data, click **View Raw Data**. The *Raw Data* dialog box opens, displaying the original inquiry information received from the lead provider. Here is an example:

  class=com.sparkroom.core.svc.interfaces.LeadCaptureRequest;received=2009-05-25 20:51:18;Phone=6236942929;WorkPhone=;HSGradMonth=may;CampusID=13;ProgramID=31;LastName=O"Farrell;City=Glendale;HSGradYear=2008;PostalCode=85310;CellPhone=;State=AZ;EmailAddress=socalbabi34@yahoo.com;FirstName=Breanna;LeadProviderLeadID=AC-3664;StreetAddress=3954 w. camino del rio;WebSource=;LeadSrcID=885;

- To view additional inquiry details, click **View Details**. This takes you to the *Lead Capture Detail* screen from where you can view additional inquiry information or, alternately, access the raw inquiry data described above. Click here to view field definitions for the *Lead Capture Detail* screen.

Lead Capture Detail Screen - Field Definitions

The following information is displayed for each lead from the *Lead Capture Detail* screen:

Field	Description
Capture Log ID	Log ID generated when the inquiry was received by the application.
Received	Date and time the inquiry was received by the application.
Result	Response action which occurred when the inquiry was received by the application (e.g., rejected).
Lead Buyer	Lead buyer who received the inquiry.
Interface	The interface which the inquiry was posted to (i.e., a URL dedicated to the lead buyer which essentially executes the buyer's lead capture script).
Provider CID	The lead provider's campaign identifier.
LMS Reference	Main lead ID/reference (used internally by Sparkroom) assigned by the application.
First Name	Applicant’s first name.
Last Name	Applicant’s last name.
Email Address	Applicant’s email address.
Branch Reference	Branch reference ID for the campus requested in the inquiry.
Test Lead	Indicates if the inquiry was received as part of a testing process.
Sender IP Address	IP address of the location which sent the inquiry to the lead buyer.
Response Code	Response code sent to the lead provider.
Verification Message	Verification message provided with the verification code.
Process Message	XML message generated during lead processing; for example: <?xml version="1.0"

	encoding="UTF-8"?><SPARKROOM_RESPONSE><RESULT>REJECT</RESULT><STATUS_CODE>SR-505</STATUS_CODE><MESSAGE>Duplicate email and phone number (Phone=[5052875449];Email=[nookerssquirrel@yahoo.com]) in past [30] days.</MESSAGE></SPARKROOM_RESPONSE>
Website	Website where the inquiry originated from.
Applicant IP Address	IP address of the applicant who submitted the inquiry.

Exporting Search Results to XLS

- Once you have generated the search results (see *Process Step: Searching for and Viewing Unprocessed Leads*), click **Export XLS** or **Export CSV** and follow the prompts to open the file. A new window opens with the inquiries exported to your selected file format from where you can view, print, save, etc. the results.