



Basic Steps to Building a Model

Central Library

1. Time settings
2. Version settings
3. Create lists
 - a. Insert list
 - b. Name the list (name with hierarchy naming convention if desired)
 - c. Set top level or designate parent list
 - d. Add properties
 - e. Set Format of properties
 - f. Add list members (manually, import a .csv or .txt, or data connector)
 - g. Create subsets as necessary

Engine

1. Create modules
 - a. Insert module
 - b. Name the module
 - c. Select dimensions
 - d. Add line items
2. Update Format for line items
3. Import/Add data (manually, import a .csv or .txt, or data connector)
4. Write formulas
5. Update Summary and Style Settings
6. Create new default view if necessary – can be done at any time after module is created

User Experience

1. Create dashboards
 - a. Insert dashboard
 - b. Name the dashboard
 - c. Click Edit to access dashboard designer mode
 - d. Add dashboard elements (e.g., text, module views, charts)
 - e. Synchronize views or line items as necessary
 - f. Save
2. Add Functional Areas (organizes Contents Panel) – this can be done at any time in the model building process
3. Add Users
4. Create Roles
 - a. Insert role
 - b. Name the role
 - c. Define Read/Write permissions
 - d. Set Landing Dashboard
5. Enable Selective Access as necessary