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Hubble 23.4

Hubble Web

User Guide for Viewer Users

Document Information

Notices

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Disclaimer

This guide is designed to help you to use the Hubble applications effectively and efficiently. All data shown in graphics are provided as examples only. The example companies and calculations herein are fictitious. No association with any real company or organization is intended or should be inferred.

Version History

DATE	REVISION	SOFTWARE VERSION	COMMENTS
8th November 2023	1.0	23.4	Initial issue for 23.4.

Customer Support

For more information regarding our products, please contact us at https://insightsoftware.com/hubble/.

For product support including Training, Documentation and Customer Support, visit our Hubble Community at https://help.insightsoftware.com/.

Conventions Used

The icons below are used in Hubble documentation to indicate type of user, experience, deployment and the ERP system applicable to the document.

ICON	USER TYPE	ICON	EXPERIENCE/ DEPLOYMENT	ICON	ERP TYPE
	Viewer Viewer users can consume content and contribute to planning.		Desktop Experience	JDE	JD Edwards
	Power Power users can consume or create content, administer and contribute to planning.		Web Experience		Oracle
	Designer Designer users can consume, create and extend content, as well as build, administer and contribute to planning.		On-Premise Deployment (for Web Experience)		
	Budgeting/Planning Users with this capability can do real-time budgeting and forecasting.		Cloud Deployment (for Web Experience)		
	Administrator Administrator users administer the Hubble Product.				

Chapter 1: Getting Started

Introduction

Hubble® is an integrated suite of performance management applications. It offers reporting, analytics and planning in a single, real-time solution that fully understands your ERP. Hubble is built on a simple idea – that things should be easy. Hubble integrates your critical business systems so end users at all levels of the organization have access to live data – extraordinarily fast. With this type of visibility, everyone can easily understand, manage and predict the business. Redundant processes disappear, and a high-performance business can emerge.

Viewer users, once granted permissions, can use the views created by Designer and Power users to create their own workspaces. As a result, they can consume the content that is relevant to them, all in real-time, in order to make timely and better-informed decisions. Viewer users can also filter the data in order to focus on specific information and drill down to other inquiries. Viewer users can export to Microsoft Excel and share workspaces with other Hubble users.

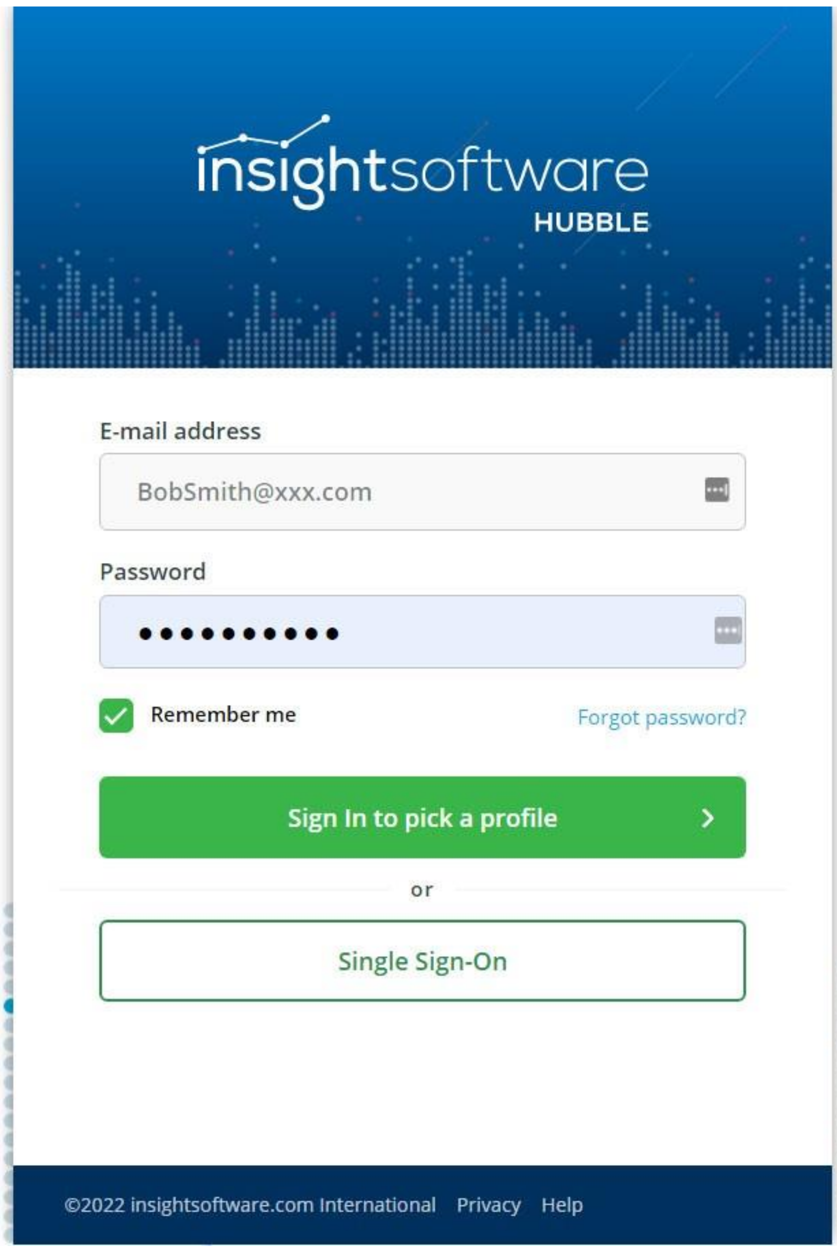
Logging In

There are two ways of logging in:

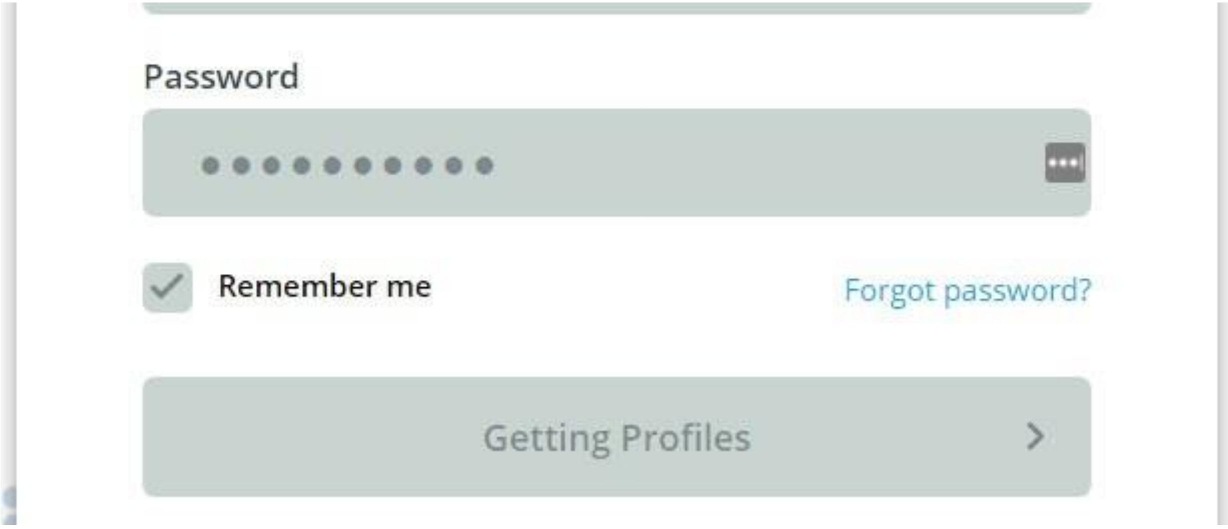
- Using your Hubble id and selecting the Hubble profile you want to be logged in. See **Login using Hubble Id**.
- Using single sign-on, if this has been configured. See **Single Sign-On**.

Login using Hubble Id

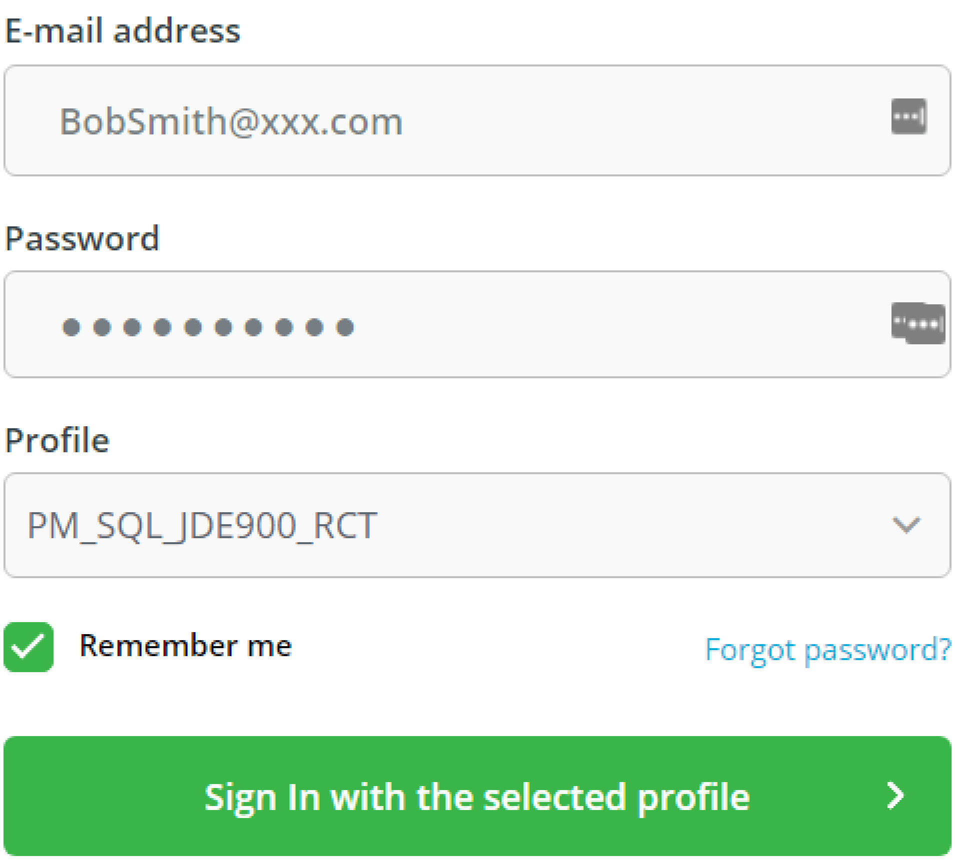
To log in using your Hubble Id and select a Hubble profile, enter your Hubble user name and password. If you want Hubble to remember these details, tick the **Remember me** checkbox. Click **Sign In to pick a profile**.



The profiles associated with the login are then fetched:



They are then listed in the **Profile** field:



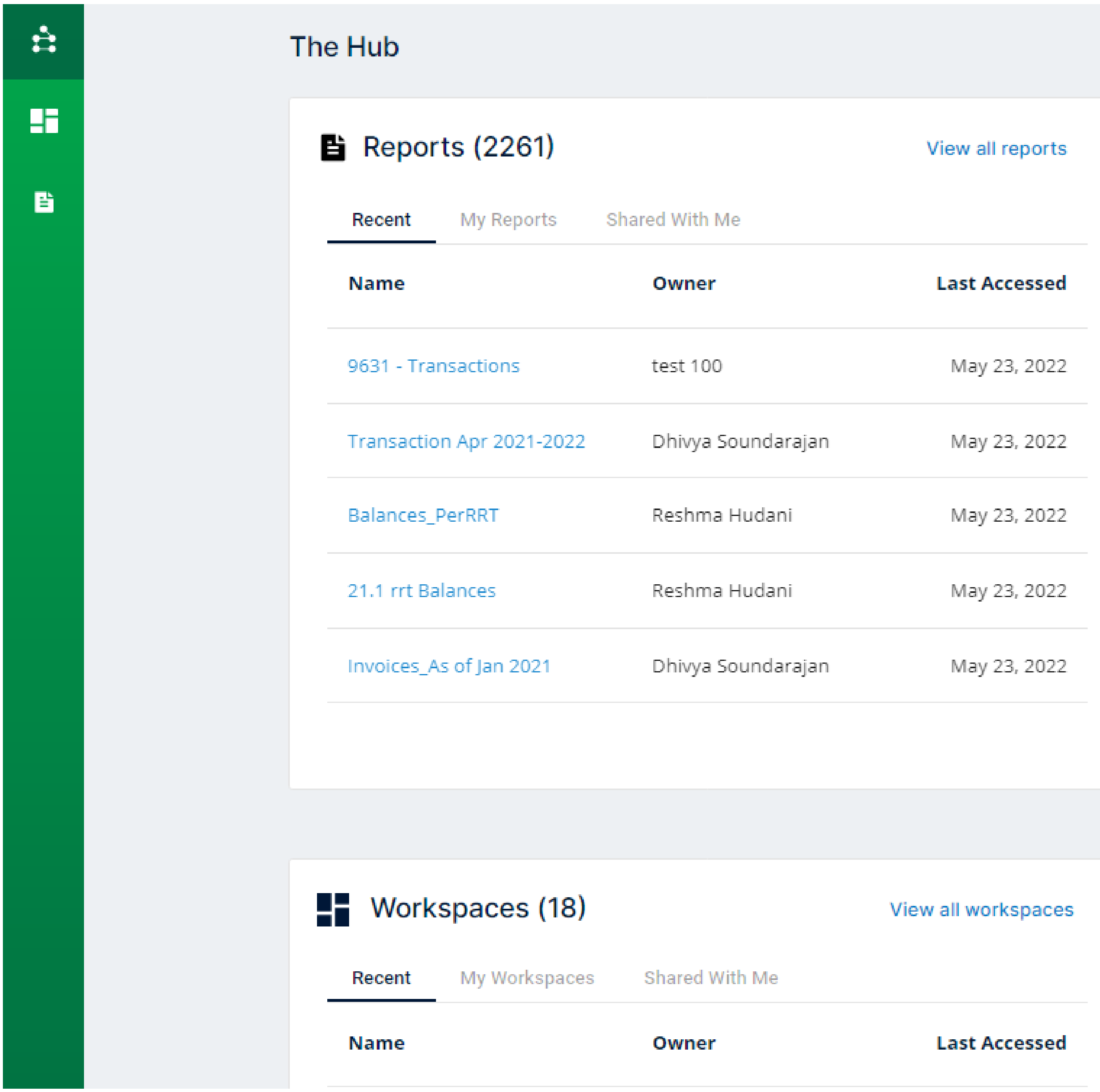
The user can then select the required profile and click **Sign In with the selected profile**.

Single Sign-On

Alternately, if the “Single Sign-On” facility has been configured, to log in using your Single Sign-On Id (i.e. your Windows log in), click **Single Sign-On**. This will open a separate log-in page (which page will depend on which Single Sign-On provider you are using). Log in using this page.

The Hub

Once you have logged-in, the **Hub** is then displayed:



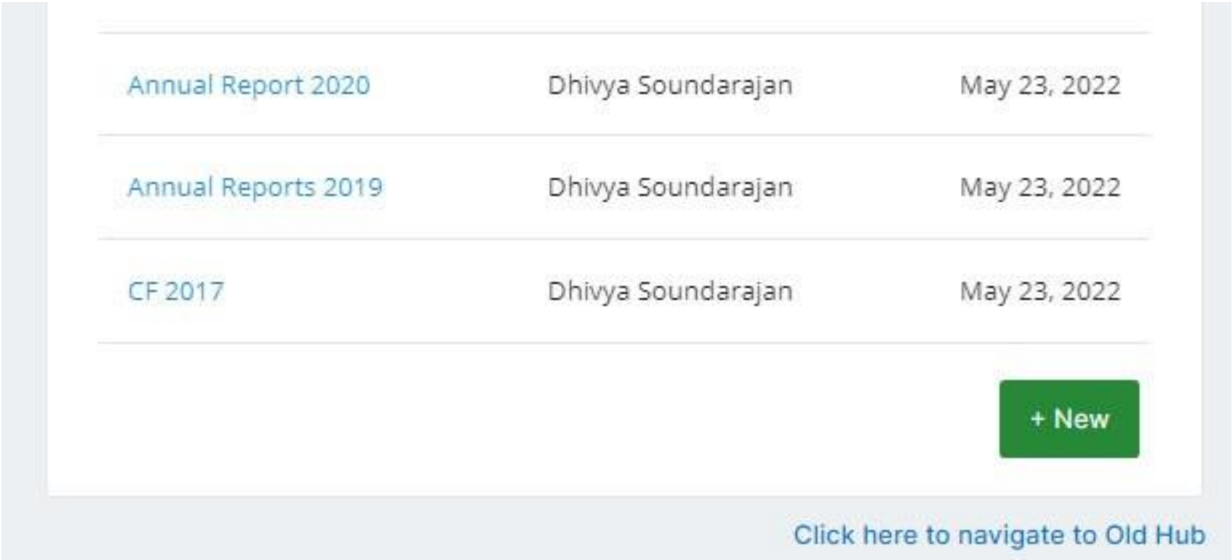
The **Hub** includes the following facilities:

- When first opened, two "cards" are displayed, one for Reports, and one for Workspaces.
- Total number of reports or workspaces the you have access to in your current profile is displayed next to the card name.
- In the cards, Reports and Workspaces are listed in the following three tabs:
    - The **Recent** tabs list the 6 reports or workspaces you have most recently accessed. The most recent is listed first. It is displayed by default.
    - The **My Reports/Workspaces** tabs list the 6 most recently accessed reports and workspaces that you have created.
    - The **Shared with me** tab lists the 6 most recently accessed reports and workspaces that have been shared with you by other users (see **Sharing Workspaces**).

      The icons next to the names of the listed report/workspace indicate the level of access (Locked or Read-Only) that you have to it. If there is no symbol, you have full access to it.

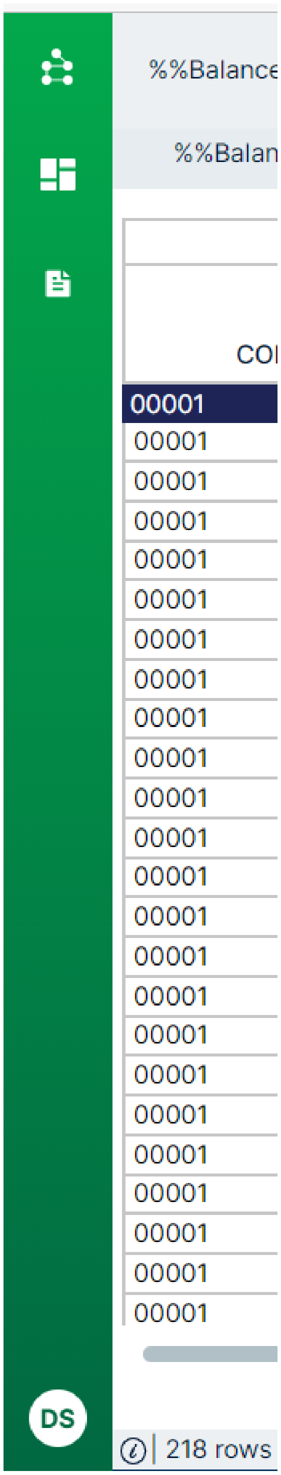
  Clicking on a report or workspace row will open the relevant workspace (see **Viewing Workspaces**).

- At the top of each card, the **View all reports** and **View all workspaces** options access the **Reports Search Page** and the **Workspaces Search Page** respectively.
- The **+ New** button on the workspaces card accesses the Workspaces area (see **Workspace Overview**) of **The Legacy Hub** in which you can create new workspaces (see **Creating a Workspace**):

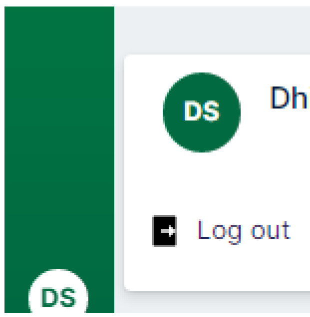


- Beneath the cards, there is a **Click here to navigate to Old Hub**, which opens **The Legacy Hub**.

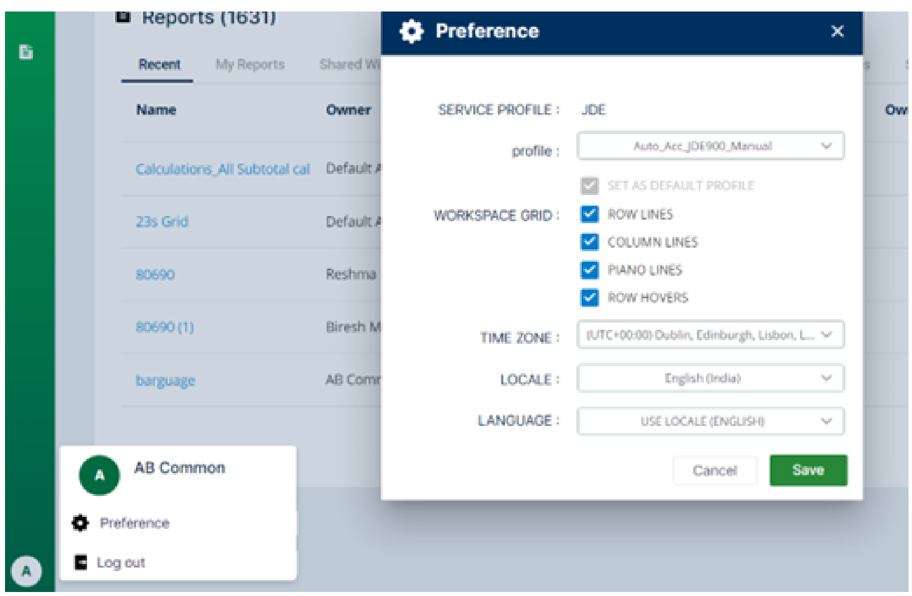
- In the Hub, and on all other pages, a sidebar is available to provide a quick way of navigating between pages. There are four options on the sidebar:



- **The Hub** - takes the user to the Hub page.
- **Workspace** - takes the user to the workspace search page. See **Hub Search Facilities** below.
- **Reports** - takes the user to the reports search page. See **Hub Search Facilities** below.
- **Profile settings** - accesses a menu which includes an option to log you out and return you to the log in page, and an option to access the **Settings** window.:



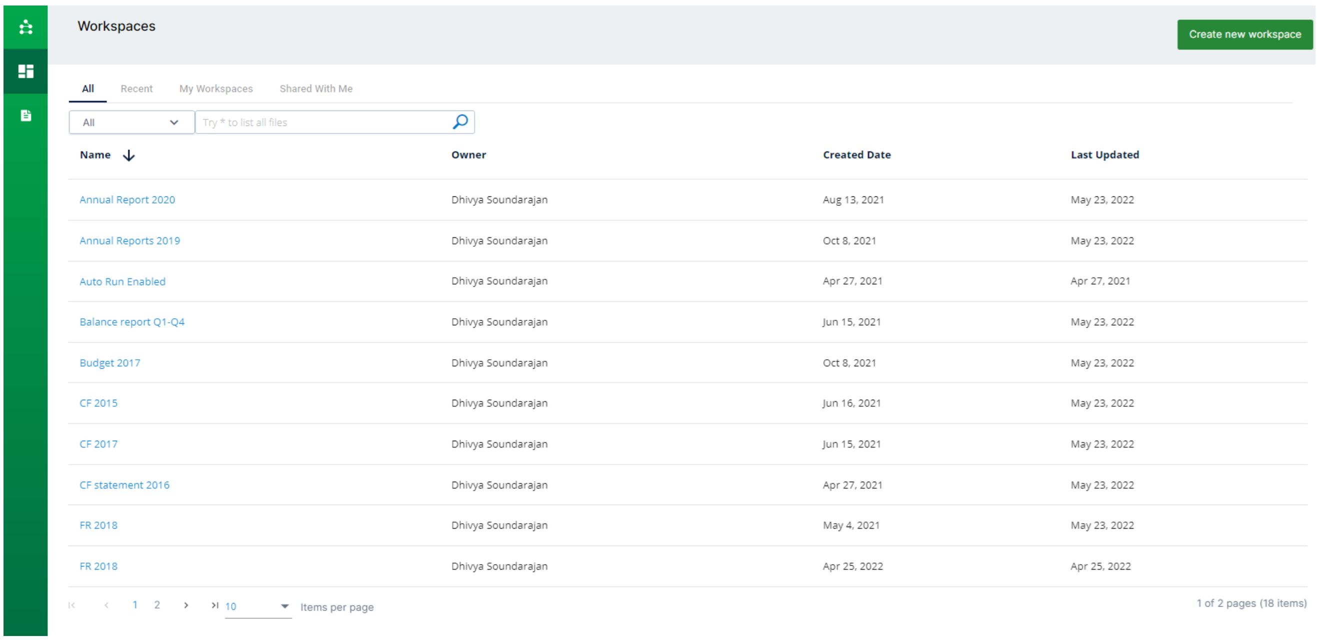
- **Preferences**- provides easier access as the option is located in the sidebar of the homepage. You can edit a Profile and set the Time Zone, Locale, and Language settings.



Hub Search Facilities

The Hub includes separate search pages for Workspaces and for Reports, accessed from the buttons on the sidebar.

Workspaces Search Page



The Workspaces are listed under four tabs: All, Recent, My Workspaces, and Shared With Me.

The page includes a search bar with the above four categories (All, Recent, etc.) available to pick from. Users can search the distributions and alerts associated with any workspace by partly entering the name of the distributions or alerts in question. The * character can be used to list all distributions or alerts or workspaces in a category.

To view a workspace, click on it. The workspace will then be opened (see **Viewing Workspaces**).

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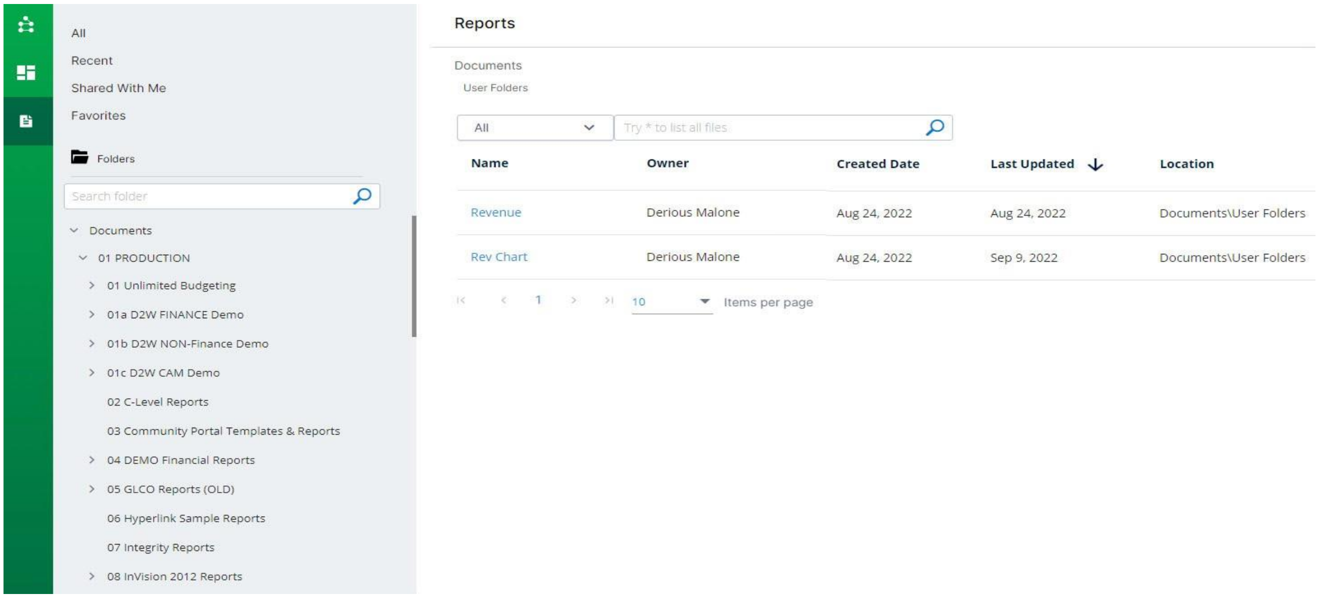
Reports Search Page

Reports are listed are accessed from five menus list in the left-hand panel of the page: All, Recent, Shared With Me, and Favorites.

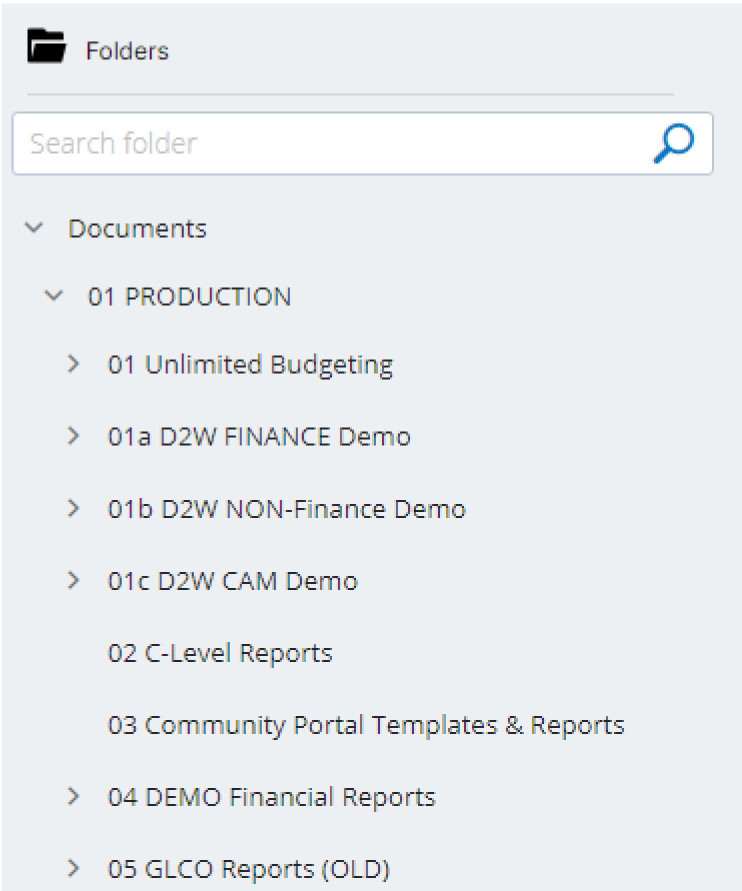


To make it easier to search for reports, the page includes a search bar in the right-hand panel with the above four categories (All, Recent, etc.) available to pick from. Users can search for charts and metrics as well as grid reports, by partly entering the name of the reports in question. The * character can be used to list all charts, grid reports or metrics in a category.

To view a report, chart, or metric, click on it. The item will then open. See **Viewing Reports and Charts** for further details.

Search for and Navigate to Reports using the Folder Structure

You can search for a report using the folder structure in which reports are located. This means that there is no need to remember a specific report name or browse through all the reports to find it. Instead, you can expand the folder structure in the left-hand panel, under **Folders**, and highlight a folder:



The system then lists the reports in that folder in the right-hand panel. Click on the required report to open it.

A search bar is also provided under **Folders**. This can be used to search for a specific folder or folders in the folder structure.

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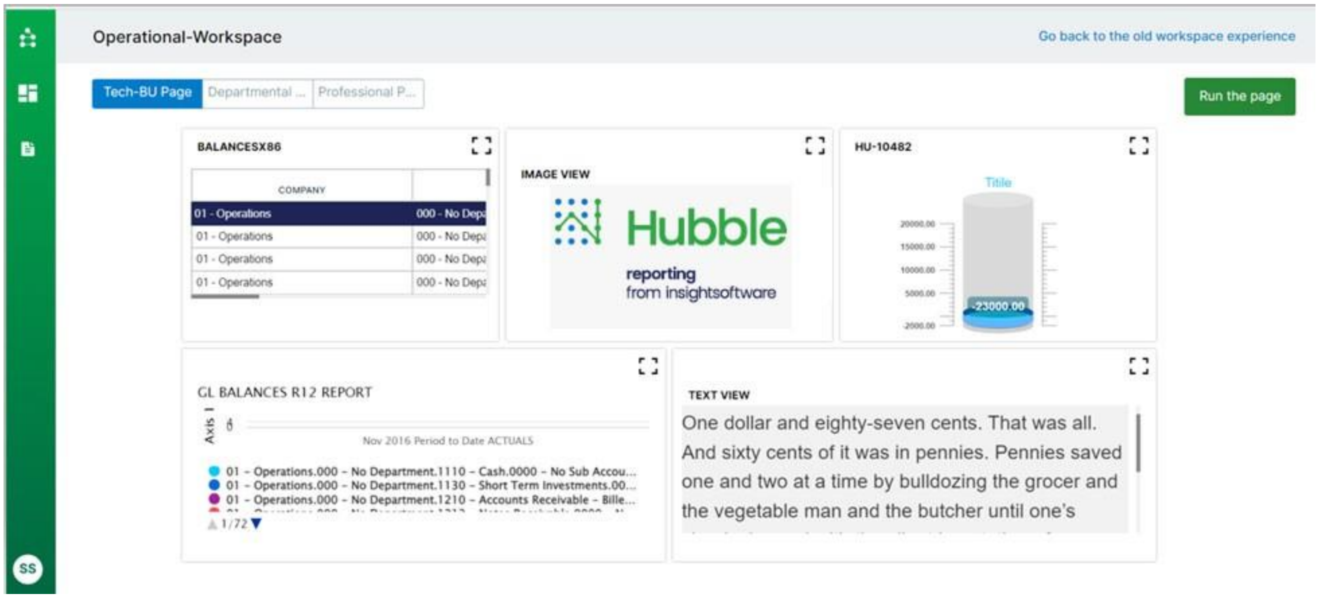
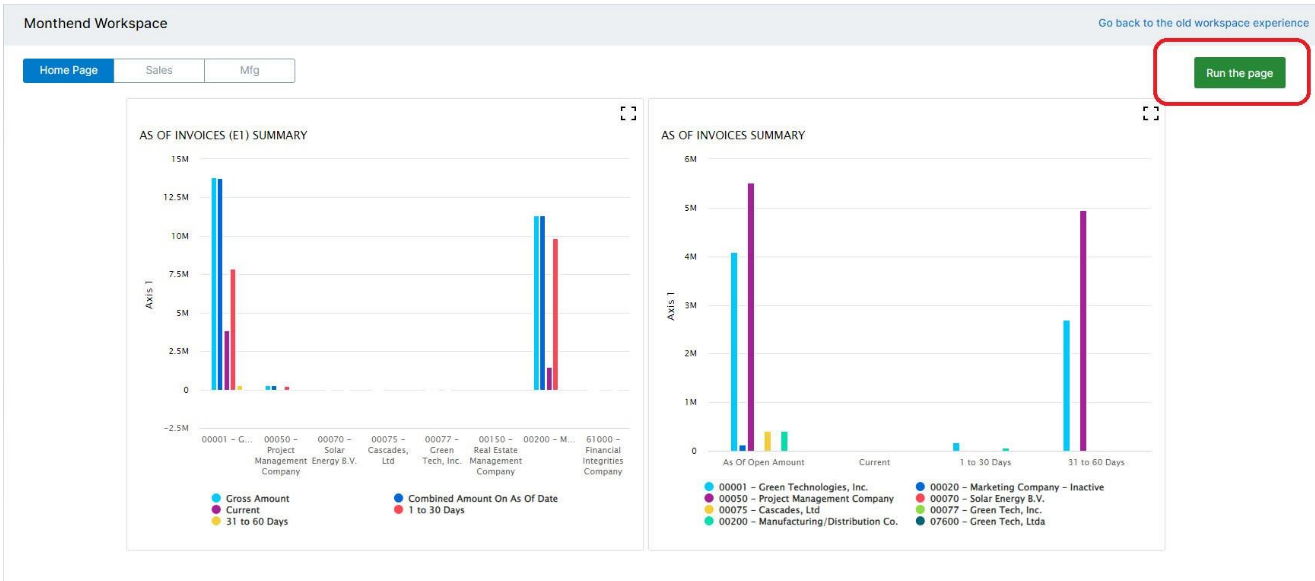
Viewing Workspaces

When Workspaces are opened from either from the Workspaces card (see **The Hub**) or from the **Workspaces Search Page** they are displayed in the Hub. For example:

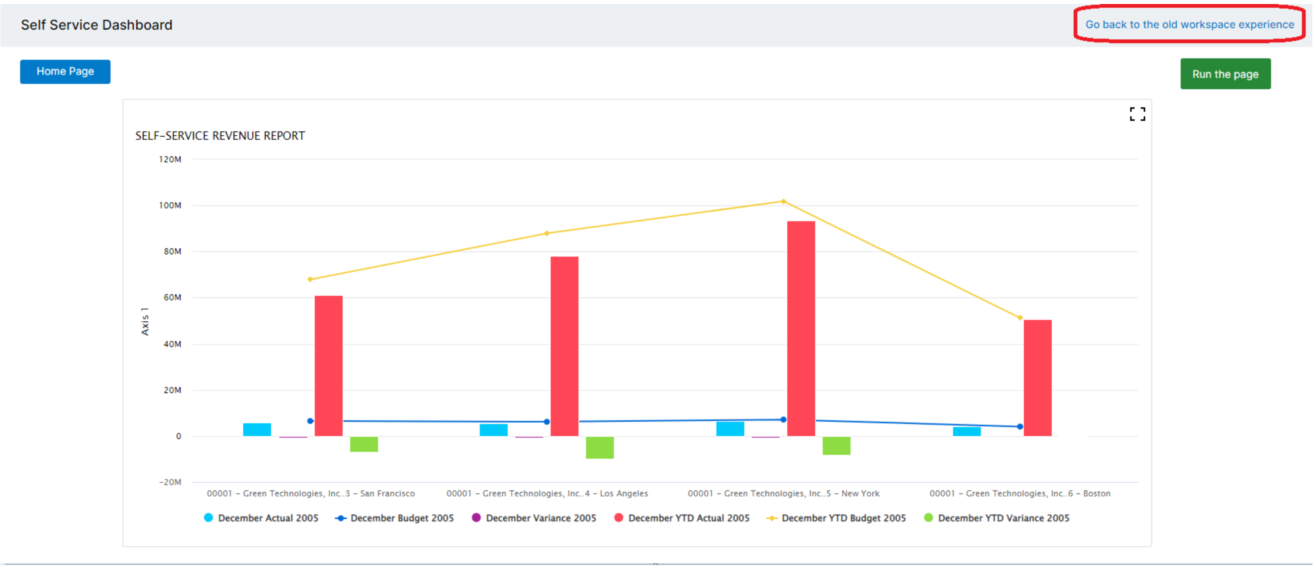


The Workspace pages are listed in the top-left of the display, under the name. Click on a page name to open it.

Click **Run the page** to populate the List, Chart and Metric views (see **View Types**) in the Workspace page with current data:.



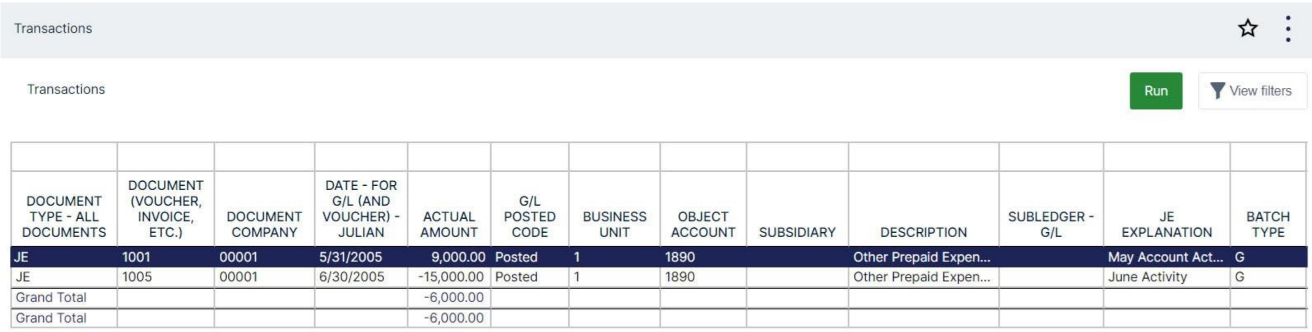
To change layout of a Workspace and the filters applied to it, access the **The Legacy Hub** by clicking on the link in the top right corner:



The Workspace can then be edited. See **Workspaces and Views** for details.

Viewing Reports and Charts

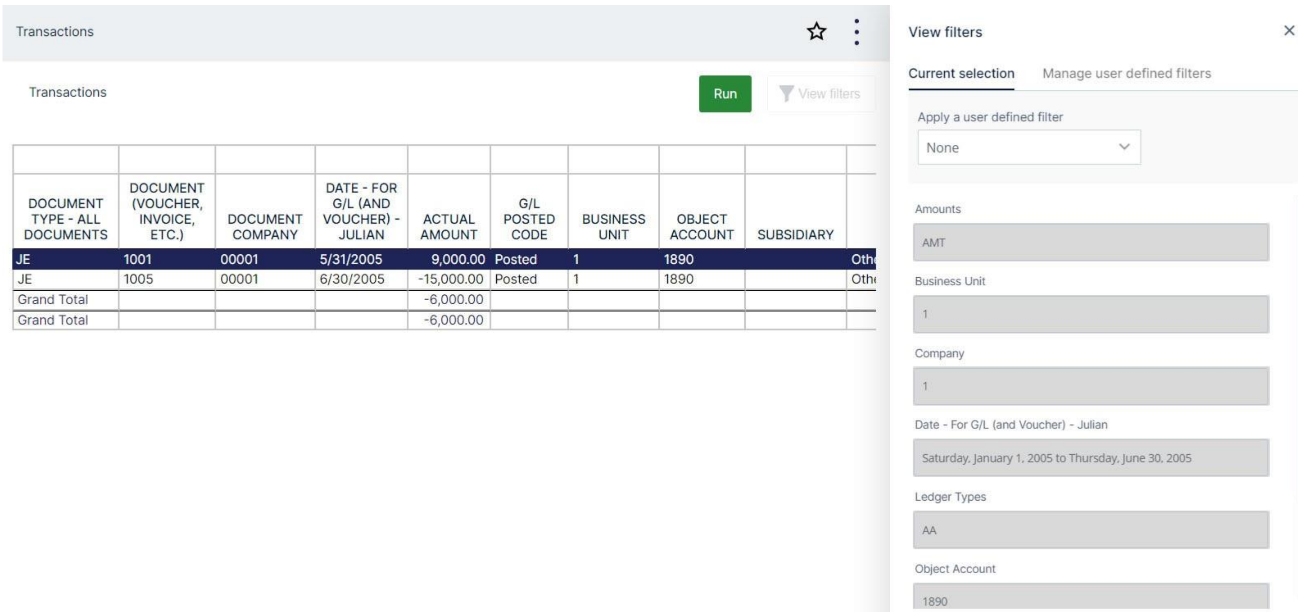
You can open any report (aka list) and basic charts from **Hub Search Facilities** search results. Reports will be opened as shown below:

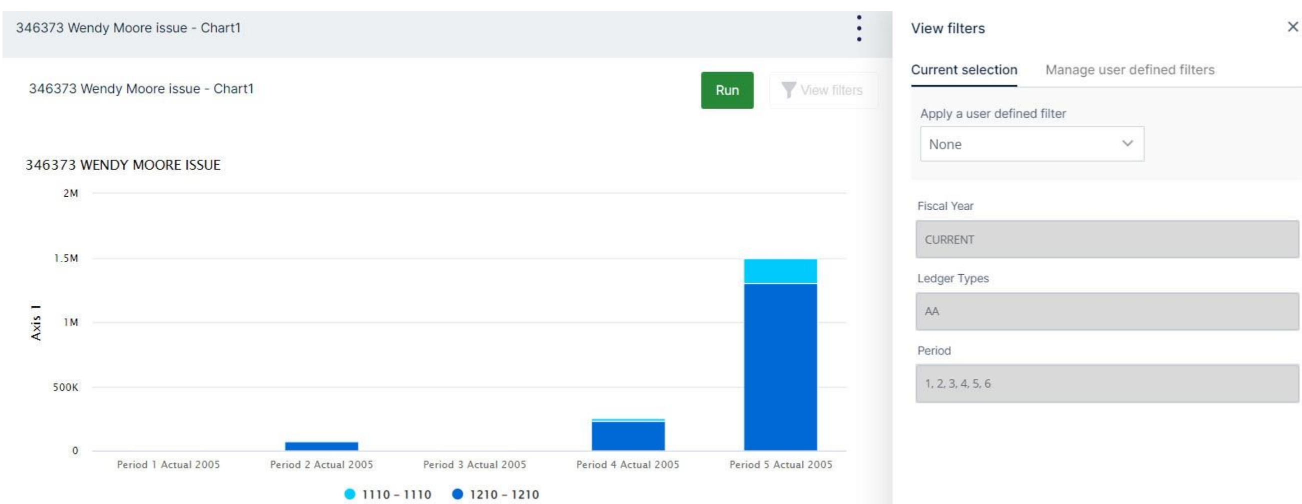


DOCUMENT TYPE - ALL DOCUMENTS	DOCUMENT (VOUCHER, INVOICE, ETC.)	DOCUMENT COMPANY	DATE - FOR G/L (AND VOUCHER) - JULIAN	ACTUAL AMOUNT	G/L POSTED CODE	BUSINESS UNIT	OBJECT ACCOUNT	SUBSIDIARY	DESCRIPTION	SUBLEDGER - G/L	JE EXPLANATION	BATCH TYPE
JE	1001	00001	5/31/2005	9,000.00	Posted	1	1890		Other Prepaid Expen...		May Account Act...	G
JE	1005	00001	6/30/2005	-15,000.00	Posted	1	1890		Other Prepaid Expen...		June Activity	G
Grand Total				-6,000.00								
Grand Total				-6,000.00								

Report Filters

Users can click **View Filters** to view reports/charts and filters side-by-side:





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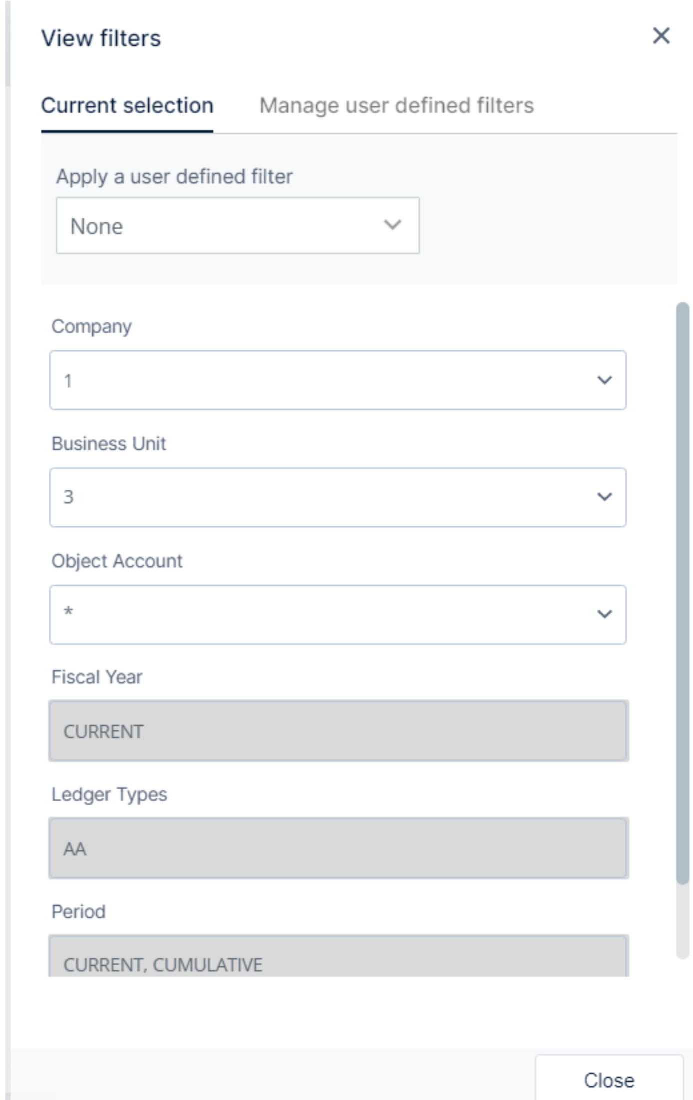
The filter panel has two tabs:

- Current selection
- Manage user defined filters

A report can be run using the default filters, or you can set filters by accessing the **Current selection** tab.



In the panel you can see how the report is currently filtered and amend this as required (see **Entering Report Filters** below).

User Defined Filters can also be specified and saved so that they can be quickly re-applied to a report in future. See **User Defined Filters**. A **Query by Example (QBE)** facility is also available to filter report data.

To run or re-run a report after applying a new filter, click the **Run** button.

Note that in the case of very large reports, the **Run** button displays a spinning green indicator to show that data is still being retrieved.

Entering Report Filters

The two types of filter fields available are “date picker” filters from which you can select a date, and “look-up” filters in which you can select a value or value(s) from a list. Where an icon is displayed in a filter field, this identifies identify its type. For look-ups this icon looks like a flashlight, and for date pickers it looks like a calendar.

Filtering Using Look-up Fields

To select a value from a look-up field, click on the flashlight icon. A look-up editor pop-up is then displayed.

To find a value or values to add to the filter, start typing the code or description required item(s) in the **Search** field. As you type, those items whose code or description matches what you have entered are listed.

Both the codes and descriptions of the matching items are displayed. The more you type, the more refined the list of values will become (assuming there are any matches).

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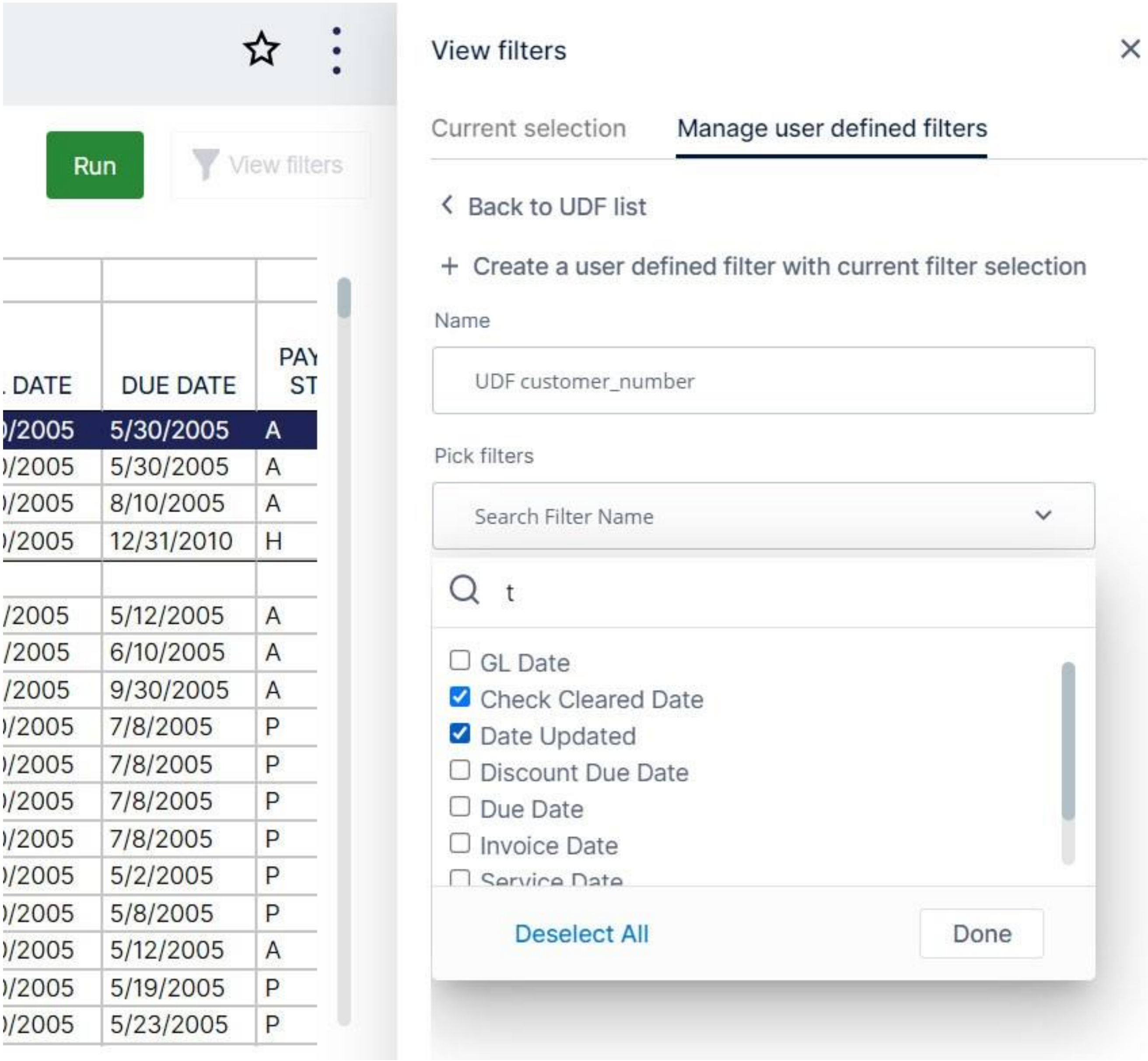
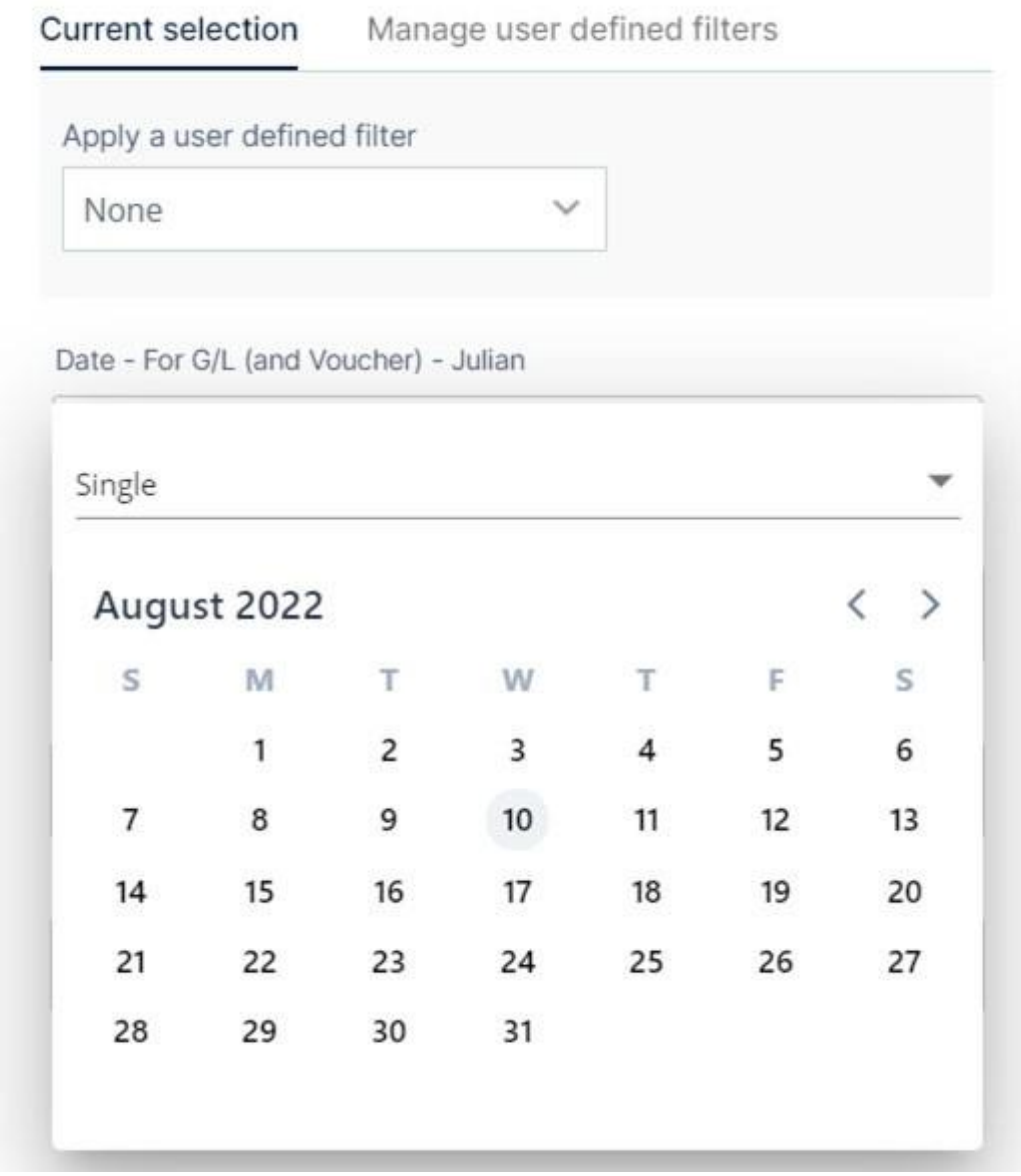
To add an item to the filter criteria, click on it. It (its code) is then added to the look-up field. Continue to search for and click on items until you have added all the required items to the filter criteria. Items are separated by commas:

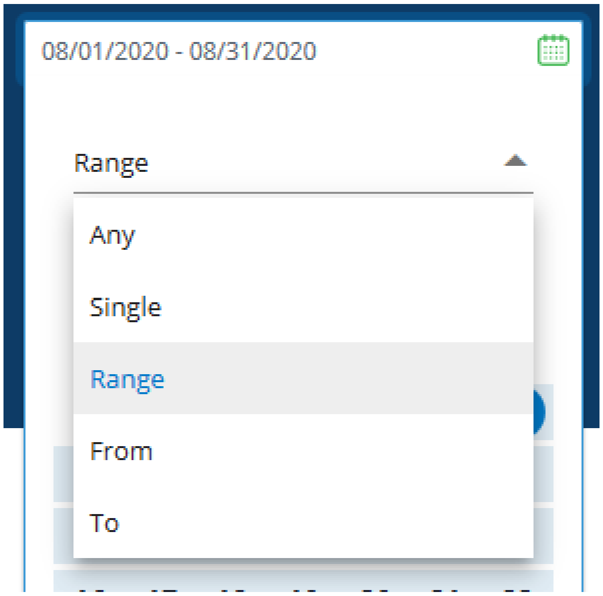


Filtering Using Date Picker Fields

To select a date or dates from a date picker field, click on the calendar icon. a calendar pop-up is then displayed:



To specify the type of date criteria to filter by, open the drop-down list:



You can select Any (meaning no date filter will be applied for this attribute), a Single date, a Range of dates, all dates From a selected date (inclusive), or all dates To a selected date (inclusive).

Once you have made your selection, select the required date or dates from the calendar (unless you selected Any in which case there is no need).

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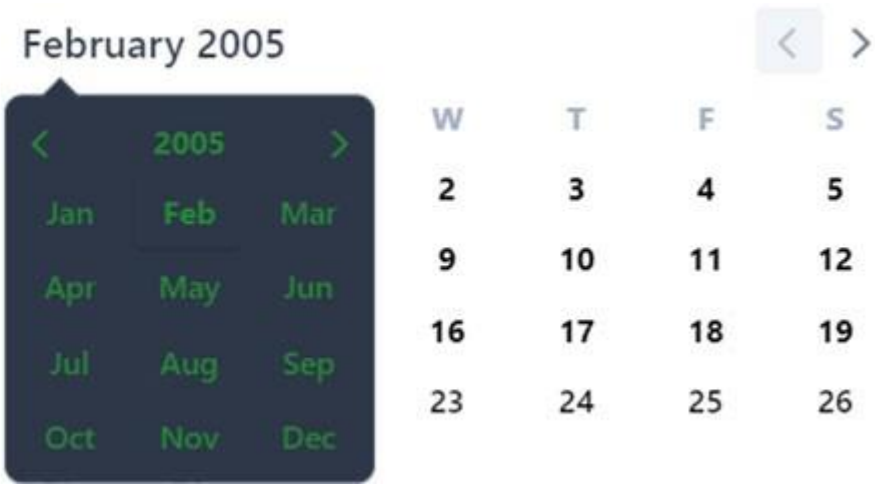
Use the arrows next to the month and year to scroll to the next or the previous month. To select a different year and/or month without scrolling, click on the displayed month and year to open the following pop-up:



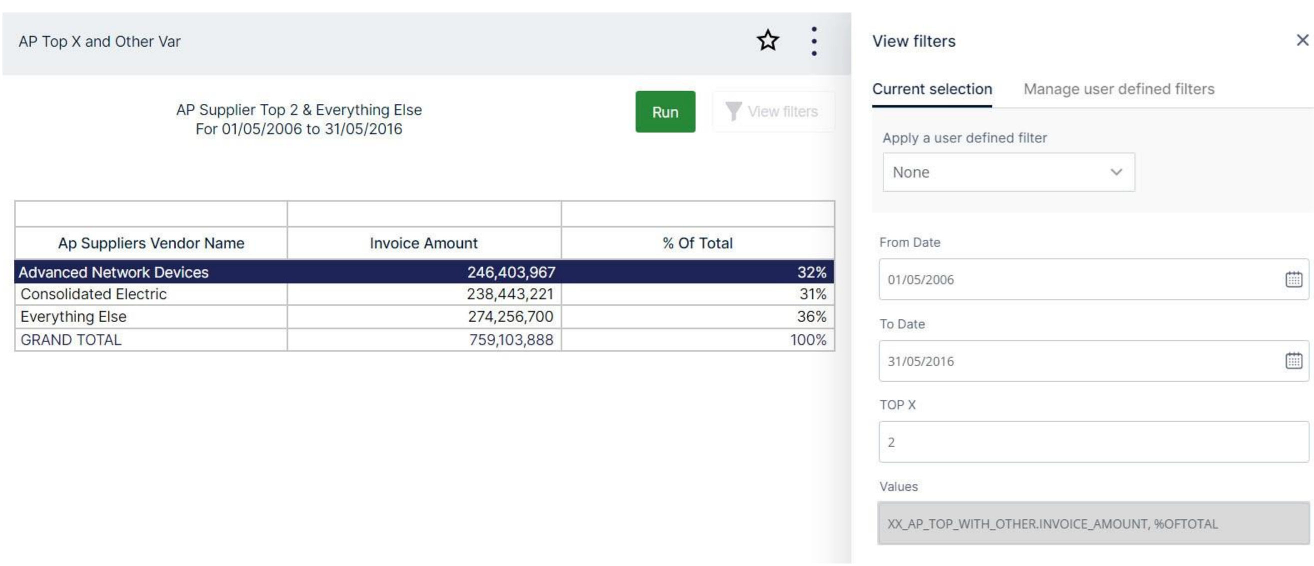
Use the arrows on either side of the year to scroll to a different year. Click on a month to select it.

Once the required date criteria have been selected, it will be displayed in the date picker field.

Report Variable Filter Fields

If a filter field is not a “date picker” or “look-up” filter field (no icon in the field), then it is a “report variable” field into which text, a number, or a boolean expression may be entered, depending on its type (there are also date report variables - these will appear as “date picker” filter fields. Report variables are specially setup in Hubble Desktop to provide extra filtering functionality for a report.

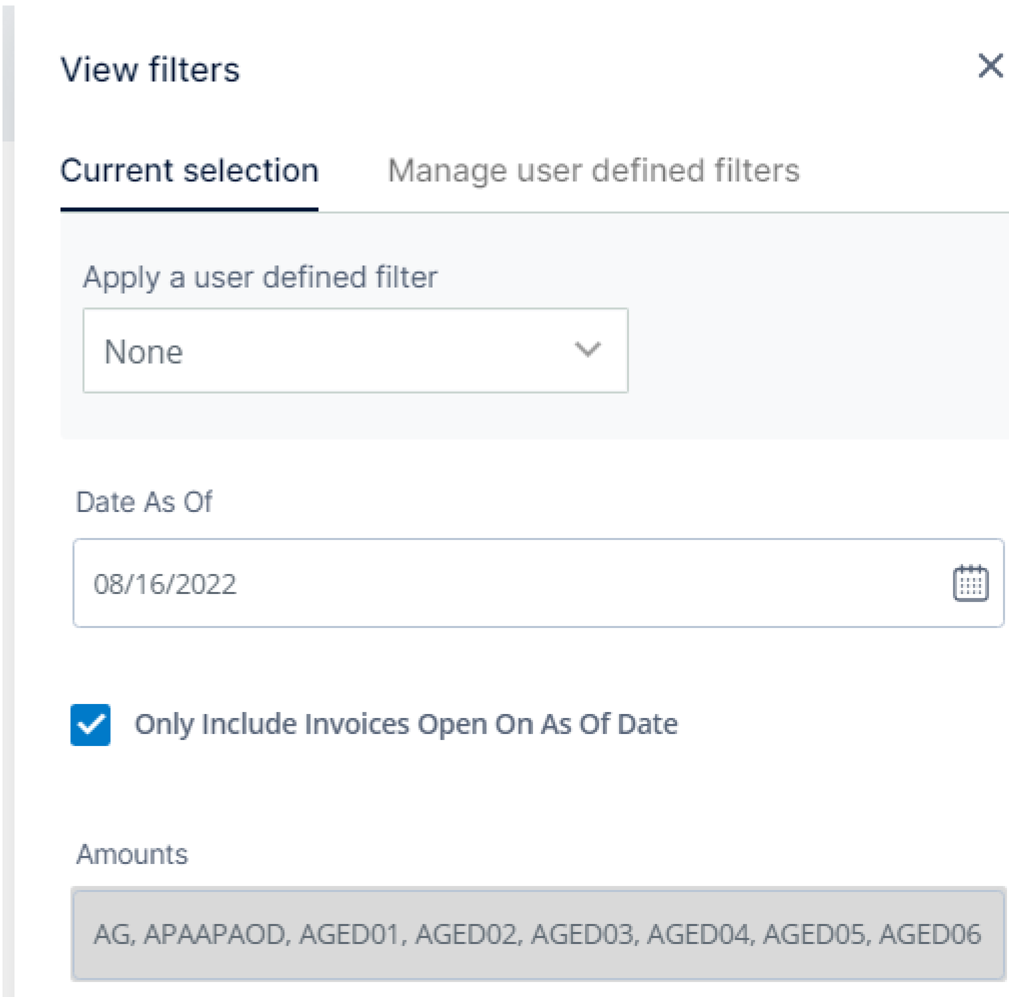
For example, in the image below, TOP X is a numeric report variable. When the user inputs “2” and runs the report, it is coded to display only the top two AP supplier Vendors for the specified dates.



Checkbox Filters

Checkboxes may also be used when filtering a report.

In the example below, the **Date As of** field lets users choose a date. In conjunction with the **Only Include Invoices Open On As of Date** checkbox, this can be used to filter Inquires based on the selected **Date As Of**.



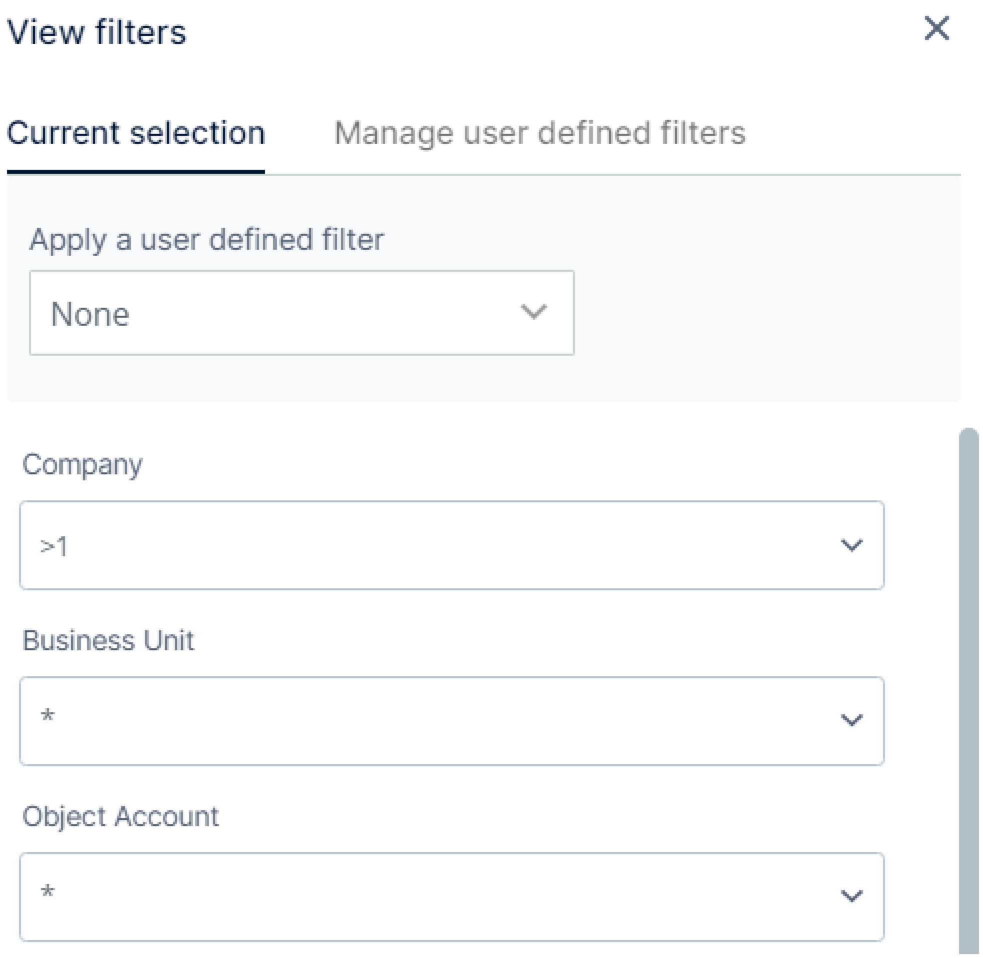
Filtering Using Expressions

After values are selected and added to the filter (as a comma separated list), you can manually modify the expression in the filter field to perform actions such as excluding a value or filtering a range between two values. The following expressions are supported:

- Include `1, 2`
- Exclude `1, !=2` or `1, <>2`
- Between `1, 2:5`
- Before/Less Than `1, <5` or Including the Value `1, <=5`

- After/Greater Than `1, >5` or including the Value `1, >=5`

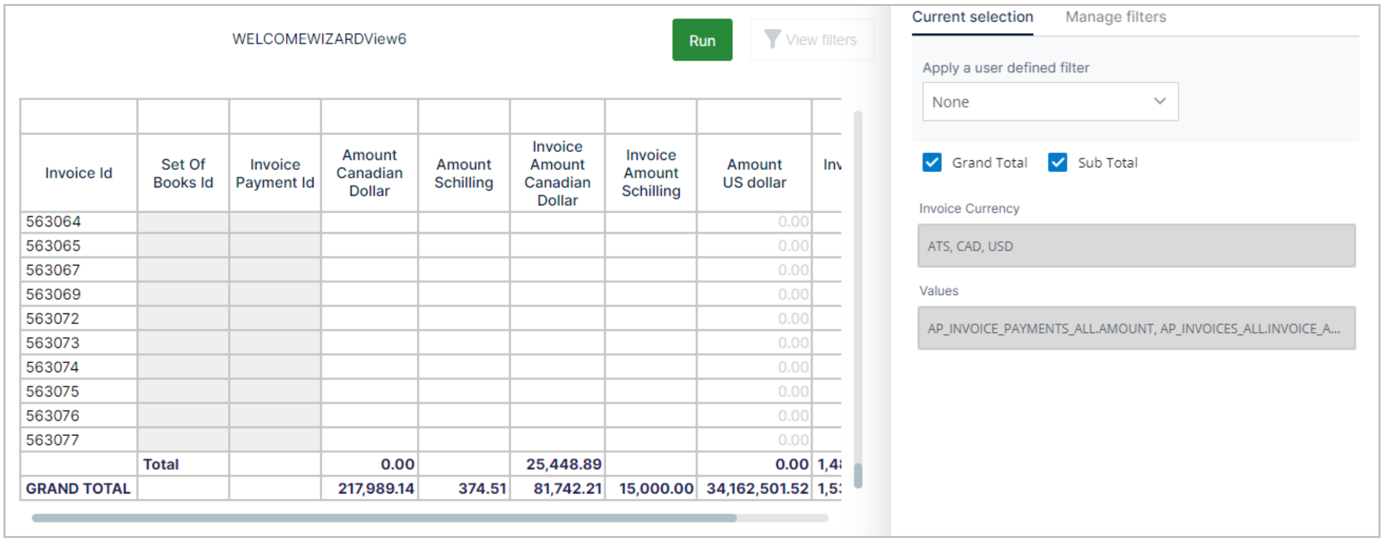
You can enter any of these filters in both types of fields by simply typing in the required filter criteria using these expressions.



Using Sub Total and Grand Total Options

The following two new checkboxes are added to Hubble Web on the filter panel of the report experience page:

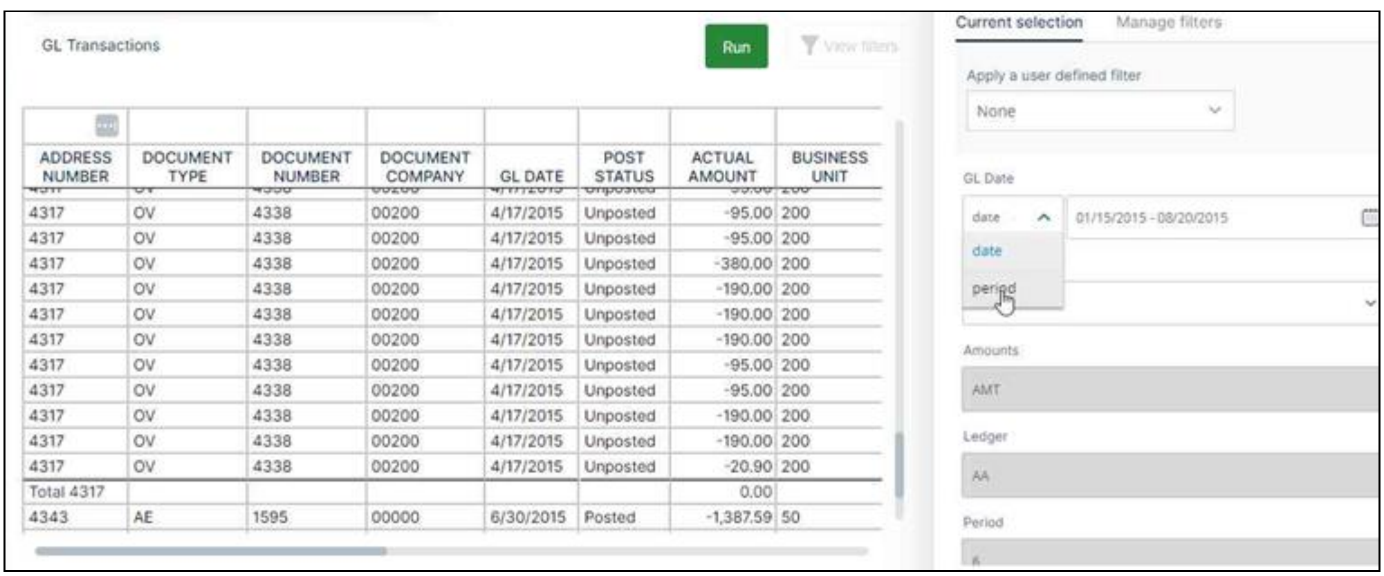
- Grand Total
- Sub Total



By default, the values for these options are taken from the Hubble Desktop. If the desktop has the options checked, then the report will have the amounts summed up to the grand total or subtotal. You can check or uncheck at any time and generate the PDF files accordingly. If the relevant columns are not present, the reports will not have **Grand Total** or **Sub Total** options available to sum up.

Using Date and Period Toggle Option

You can now select either Date or Period options using the GL Date toggle option. The default value for this toggle option is taken from the Hubble Desktop. You can modify it on the Hubble Web at any time and can generate PDF files accordingly.



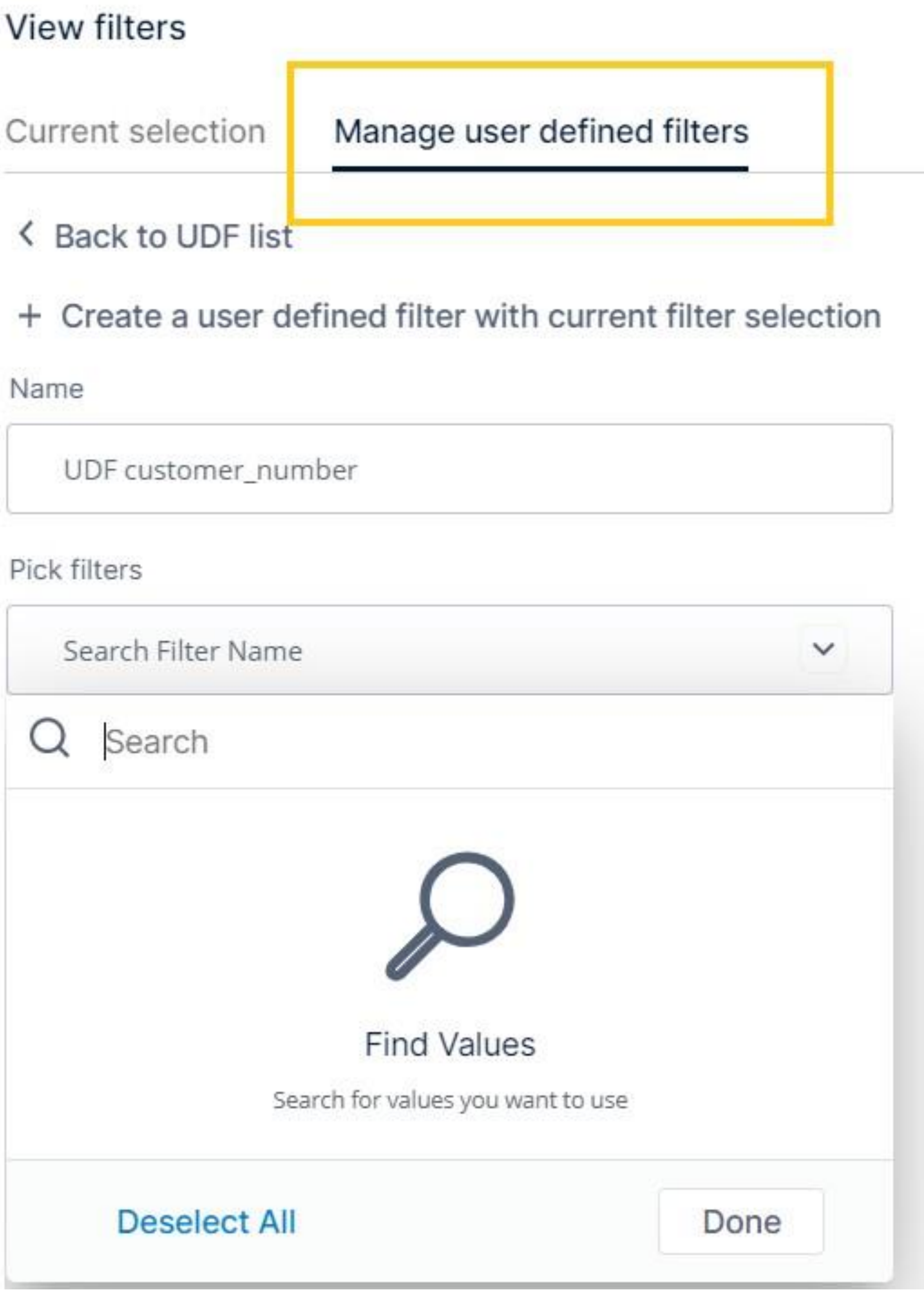
User Defined Filters

A User Defined Filter (UDF) allows users to define and save preset filter criteria for running inquiries. You can create and save multiple UDF sets and then choose the appropriate filter to use prior to running an inquiry.

This functionality will save time when preparing to run an inquiry since you no longer have to populate the filters individually with the required values. This is especially helpful if for example you often use certain filter selections for a department or business unit, as you will not have to type in the same filter criteria each time you create a new inquiry.

By default, the feature will apply a filter set when a report is opened, saving the user from needing to select a set each time they open a report.

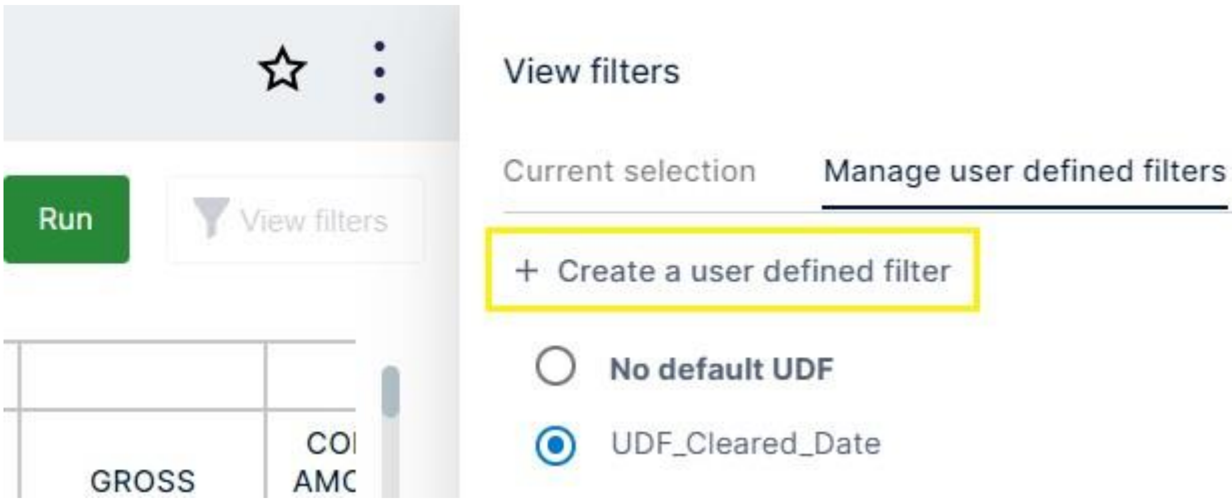
User Defined Filter functionality is accessed from the **Manage user defined filters** tab of the **View filters** panel:



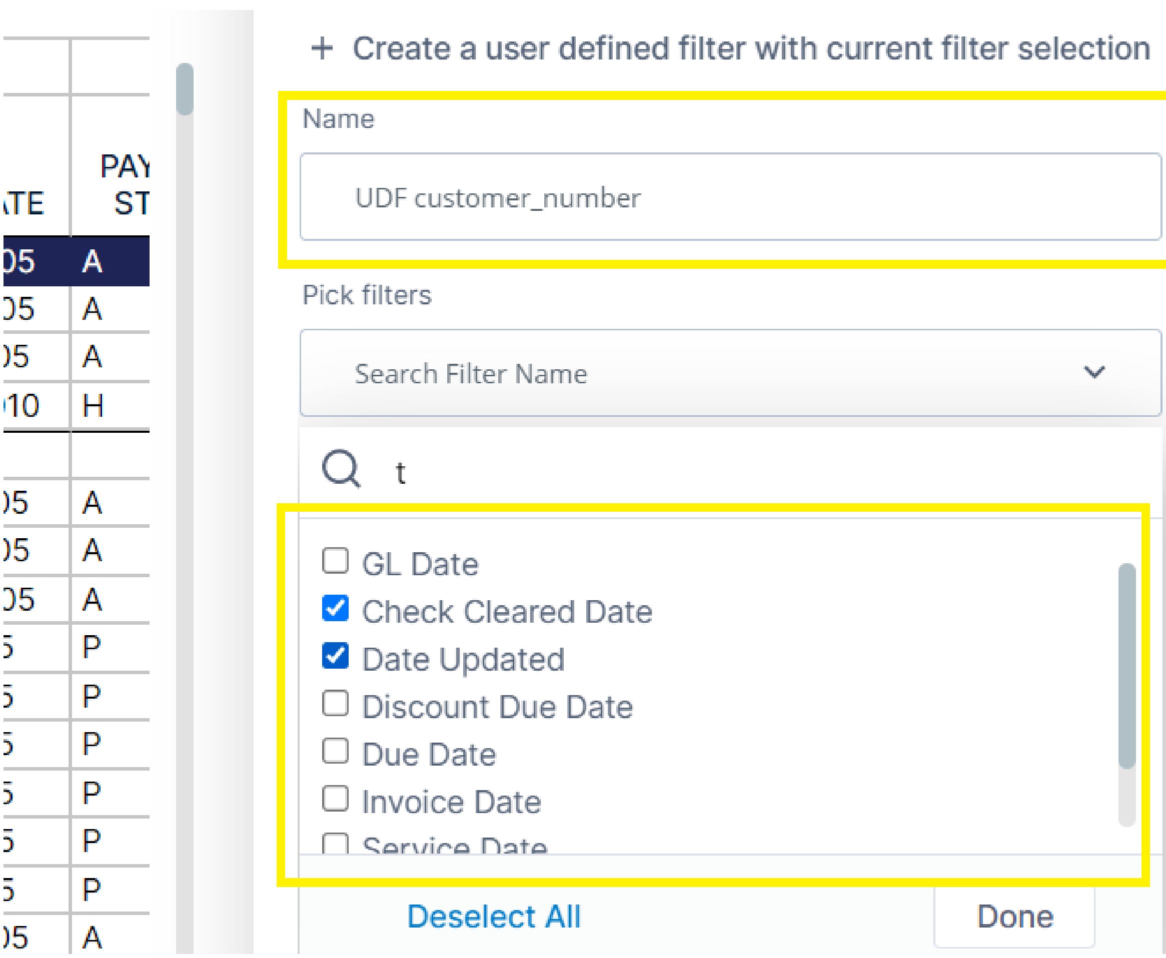
Creating a UDF

To create a UDF set, follow the steps below.

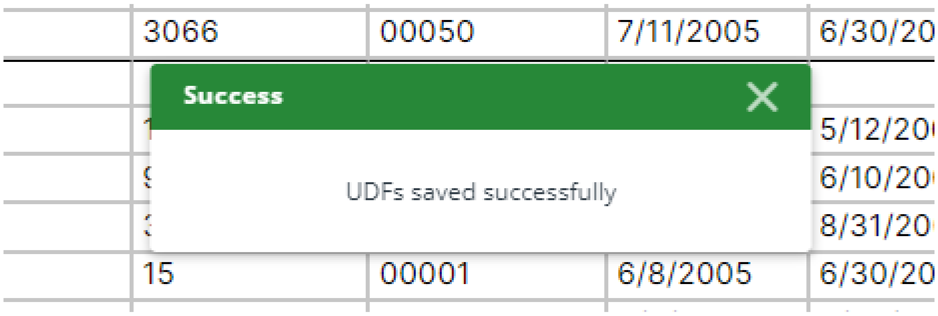
1. Click on **+ Create a user defined** filter:



2. Type in a name for the new UDF into the **Name** field.

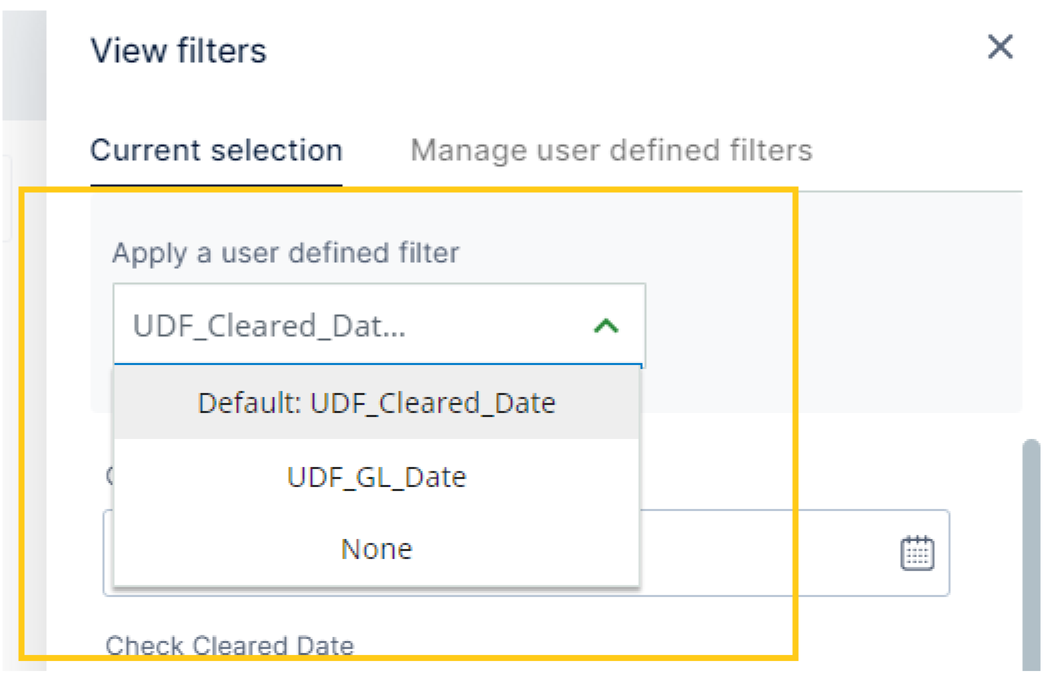


3. Set values for the picked filters.
4. To create a UDF for the filters that are available in the **Current selection** tab, click on **+ Create a user defined filters with current filter selection**. All the UDF settings will be populated with those of the filter. These can then be edited and saved as a new UDF if required.
5. Click **Save** to create the new UDF.
6. If the UDFs are created, a “UDFs saved successfully” message will popup.



Applying a UDF

Created UDFs can be viewed by clicking on **Apply a user defined filter** on the **Current selection** tab.



The user can choose any UDF from the list, or click on “None” if they decide not to use one.

If a UDF is set as default (see below), then it will be suffixed with the “default:” key word.

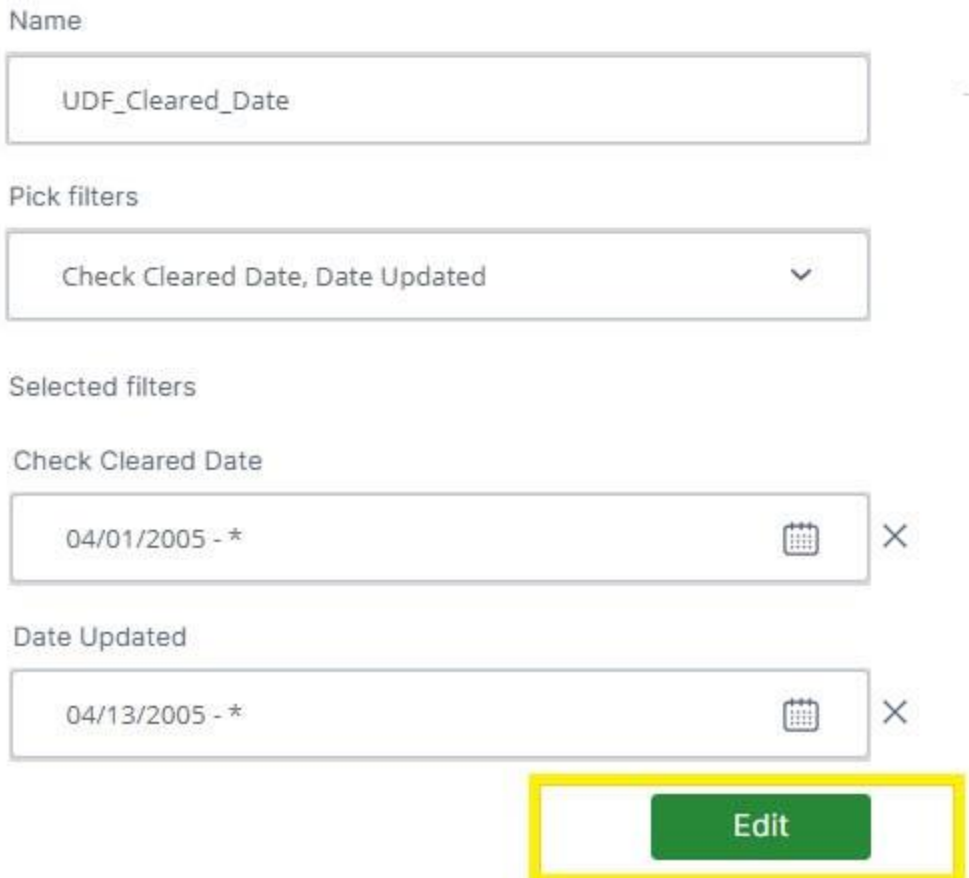
Managing a UDF

A UDF can be edited, deleted, copied, and made default.

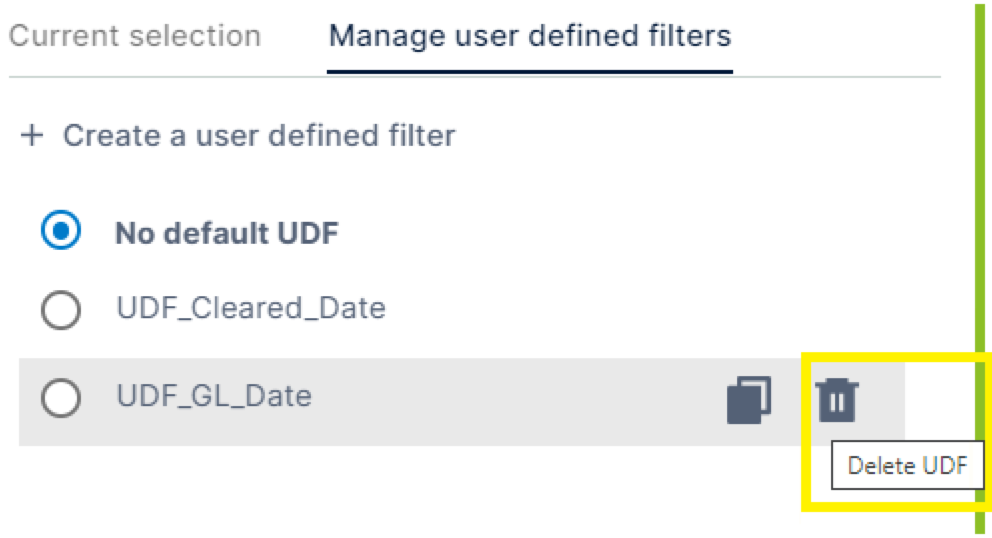
- To make a UDF default for a report, click on **Manage user defined filters** tab and select a UDF to make it default. Whenever the report is opened it will now have the default UDF displayed on the **Current selection** tab.

- If no default UDF is required, click the **No default UDF** option. This is the default setting.

- To edit a UDF, click on a UDF then click **Edit**. Once the edit is complete click on **Done**.



- To delete a UDF, select it, then click on the Delete UDF button. A warning message is then displayed. Click **Proceed** on the message box the UDF will be deleted. This deletion will also be reflected on the desktop .



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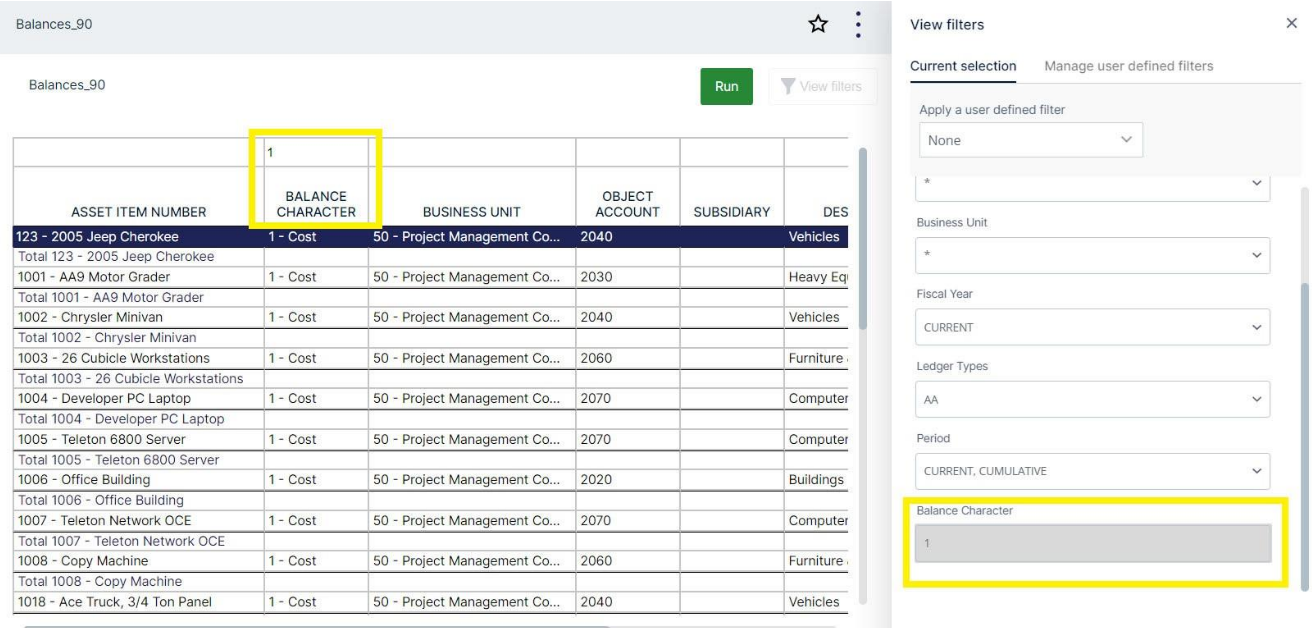
- To delete a UDF, select it, then click on the Copy UDF button. A copy of the UDF is then created with a same name except suffixed with "copy1" to differentiate it from the original. The user can then edit the name as required.

Query by Example (QBE)

Filtering can also be carried out by using a Query by Example (QBE) facility. QBE filtering is performed by entering the required filter values in the QBE Filter Line, which is displayed above the report columns. This is displayed once a report is run. For example:

ASSET ITEM NUMBER	BALANCE CHARACTER	BUSINESS UNIT	OBJECT ACCOUNT
123 - 2005 Jeep Cherokee	1 - Cost	50 - Project Management Co...	2040
123 - 2005 Jeep Cherokee	2 - Accumulated Depreci...	50 - Project Management Co...	2140
123 - 2005 Jeep Cherokee	4 - Depreciation Expense	YARD - Yard	8330
Total 123 - 2005 Jeep Cherokee			
1001 - AA9 Motor Grader	1 - Cost	50 - Project Management Co...	2030
1001 - AA9 Motor Grader	2 - Accumulated Depreci...	50 - Project Management Co...	2130
1001 - AA9 Motor Grader	4 - Depreciation Expense	YARD - Yard	8441
Total 1001 - AA9 Motor Grader			

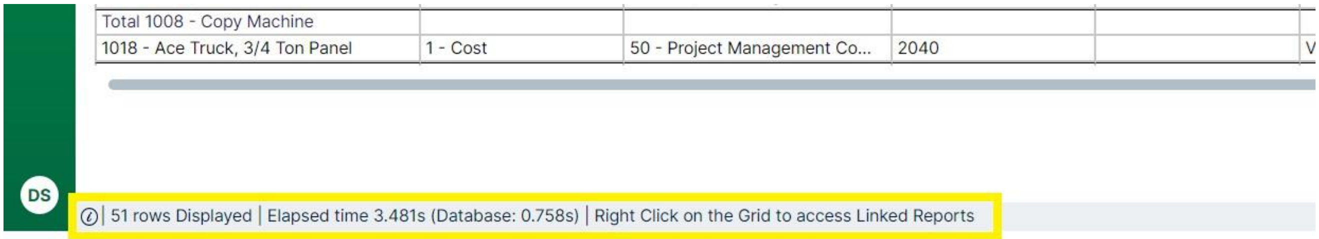
A report retains the QBE values as read only filters until the user clears the corresponding QBE cell value, the session times out, or the user logs out from Hubble.



For further details on the use of QBE filtering, please refer to the to the "Query by Example" topic in the [User Guide for Designer and Power Users](#).

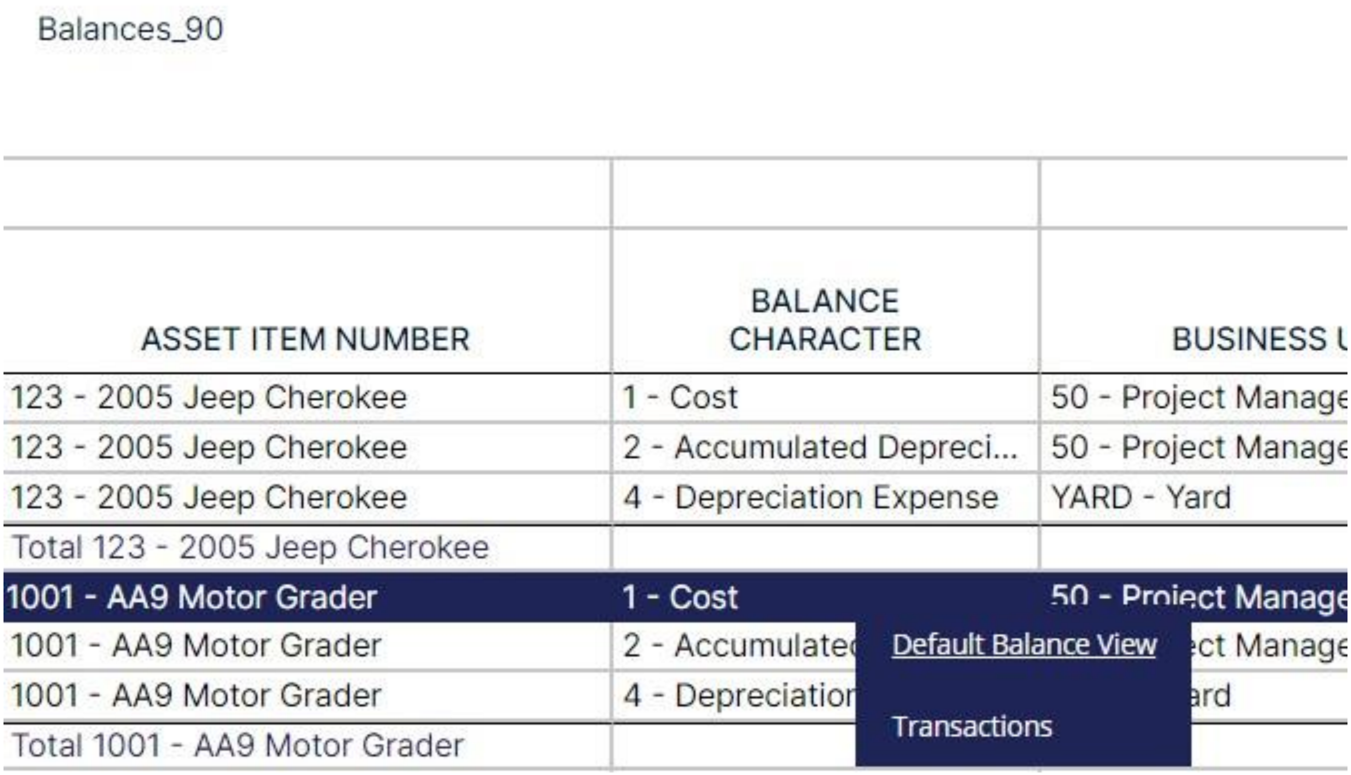
Report Status Bar

The Report Status bar shows the number of report rows displayed, elapsed loading times, and information on how to access any linked reports (see **Drilling Down into a Linked Inquiry**).



Drilling Down into a Linked Inquiry

To drilldown from a report into a linked inquiry, you can right-click on any row, and you will be taken to the linked inquiry in the context of the row you drilled down upon.



Linked Inquiries

Linked inquiries are displayed within the same browser tab, and are run automatically. When you select a linked inquiry, the report is run and loaded, so there might be a small, noticeable delay while this happens.

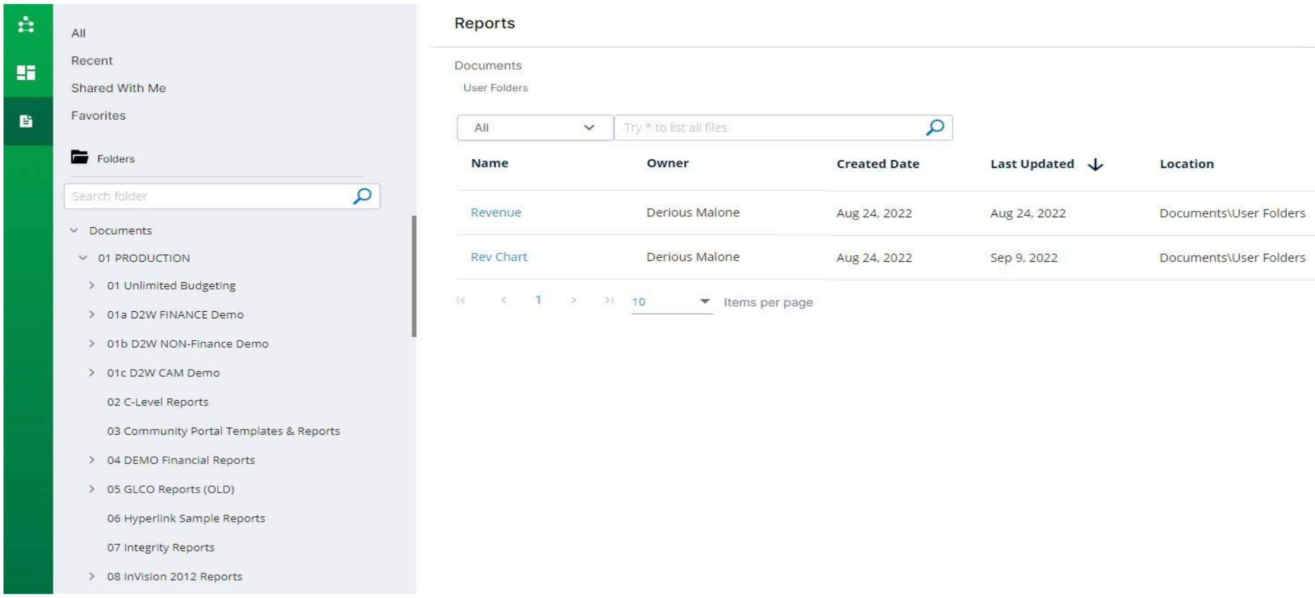
You can also open a linked inquiry in a new tab by right-clicking on the linked inquiry and then clicking **Open link in a new tab**.

Once a drilldown has been loaded, "breadcrumbs" which indicate the path you took to get here via previous reports.

These breadcrumbs are clickable, enabling you to navigate back to the reports you were viewing previously.

Opening a Chart

Use the **Hub Search Facilities** to search for the charts you want to view. For example:



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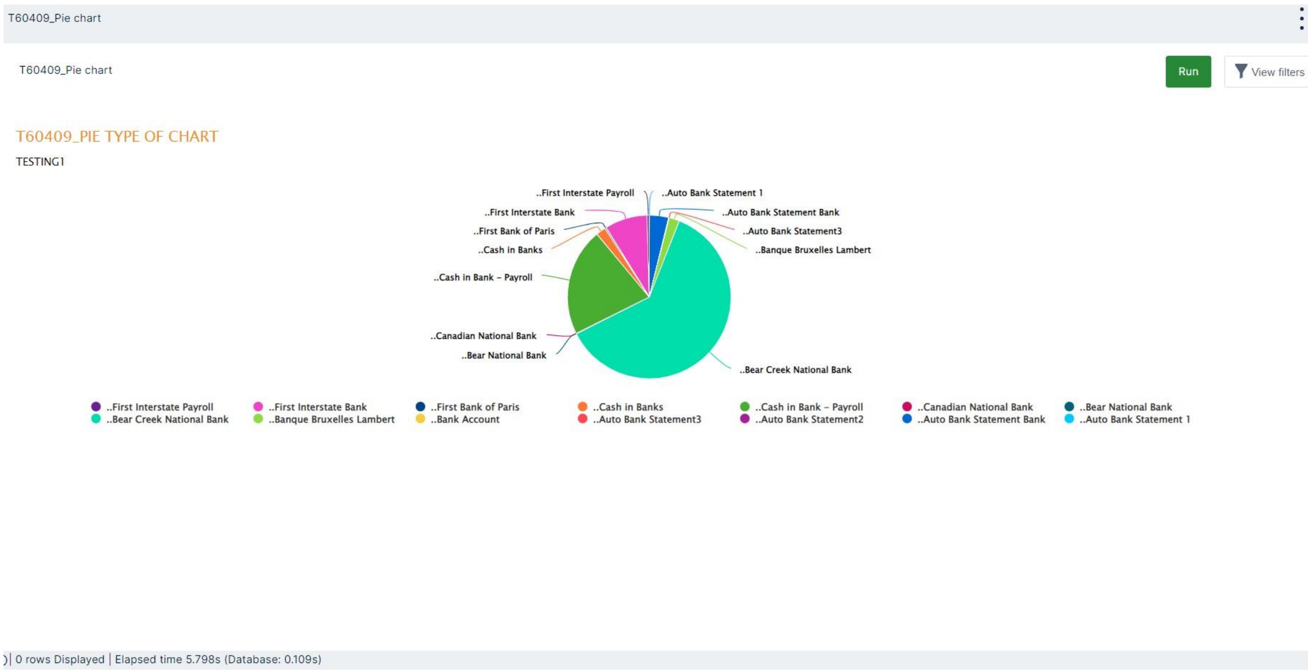
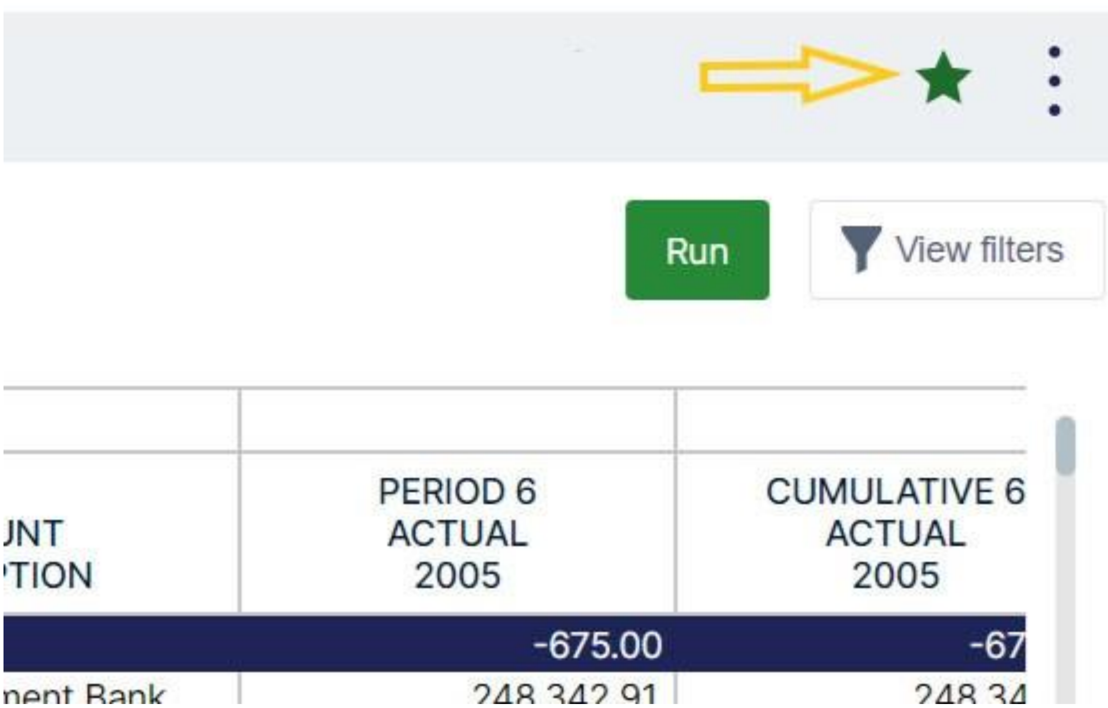
Click on the title of a chart to open it. For example:

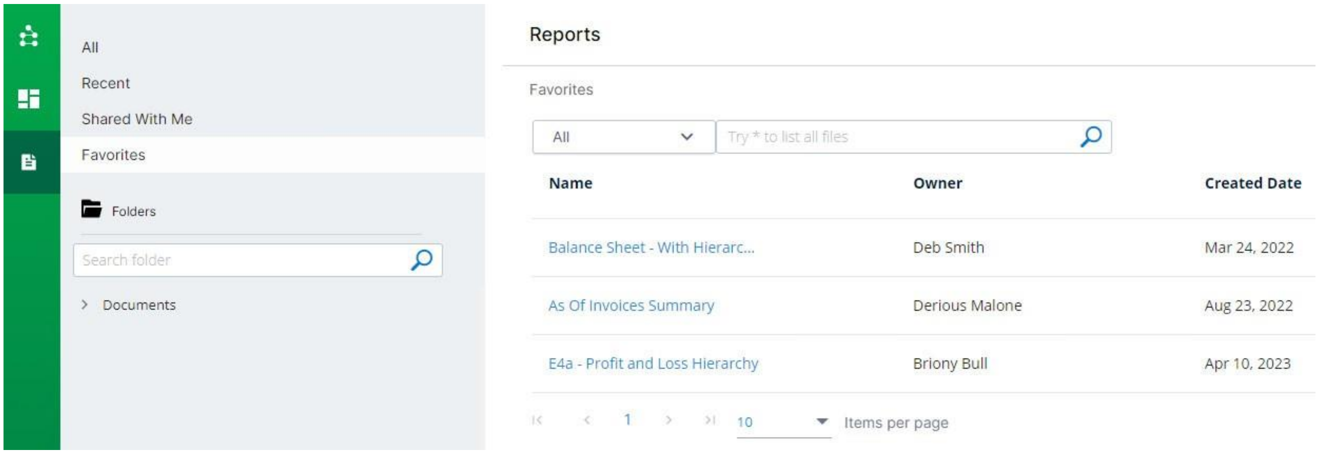


Marking a Report as a Favorite

To mark a report as a favorite, open it and click the star button:

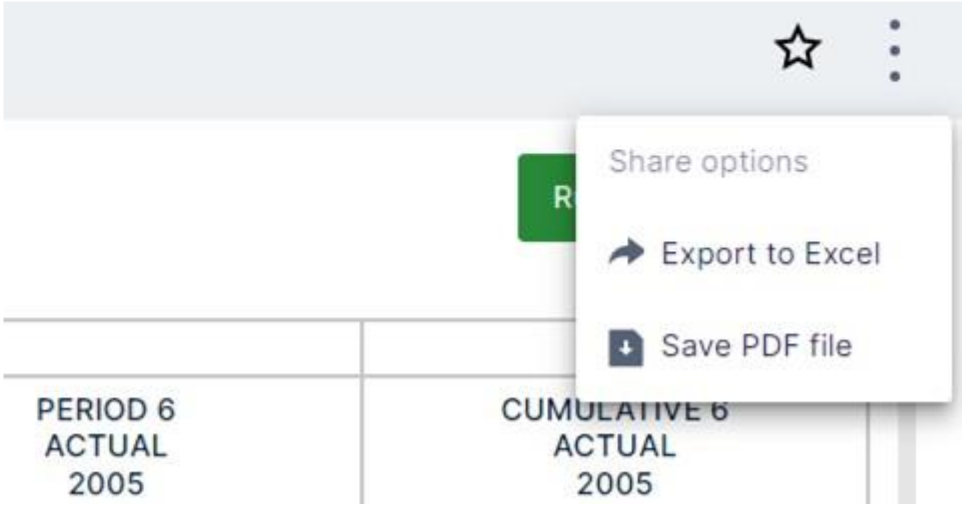


The marked report will then be listed on the **Favorites** page:



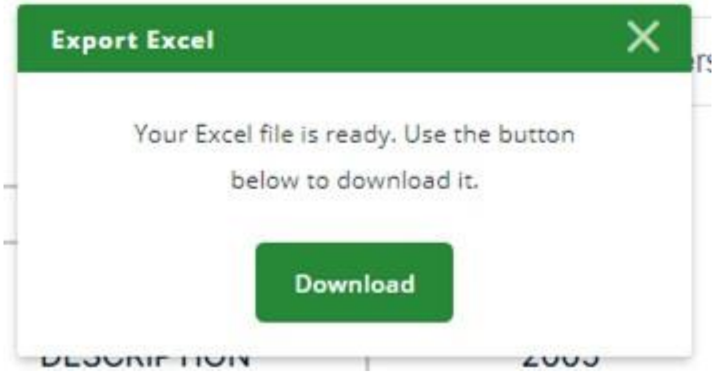
Exporting a Report to Excel

To export a report to an Excel spreadsheet, click the menu button in the top-left corner (the three dots) and select the **Export to Excel** option:



A notification will appear indicating that it is in progress.

After the export is complete a success notification is displayed including a link which can be used to download to Excel file:

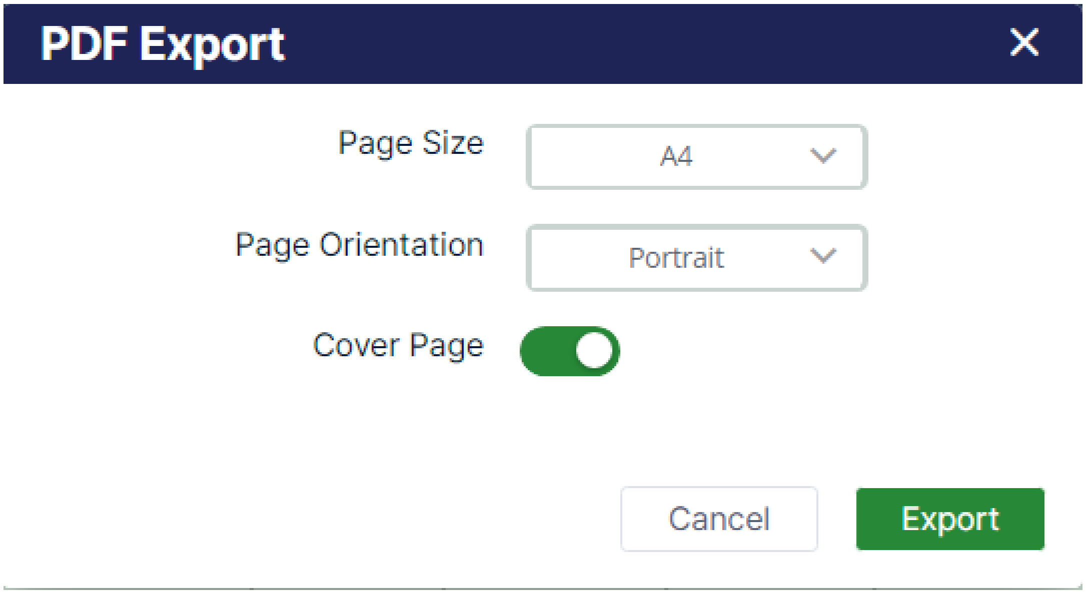


We advise that you do not navigate away from the report page until the export is complete, otherwise it is likely you will not receive the above message and will be unable to downloaded the file.

Exporting to PDF

To export a report to a PDF file, click the menu button in the top-left corner (the three dots) and select the **Save to PDF file** option:

This will open the PDF export option dialog, on which the PDF page size and orientation can be set.



Page orientation can be either landscape or portrait. Page size can be A4, A3, Letter, Legal or Tabloid.

If a cover page is required, toggle the **Cover Page** option on.

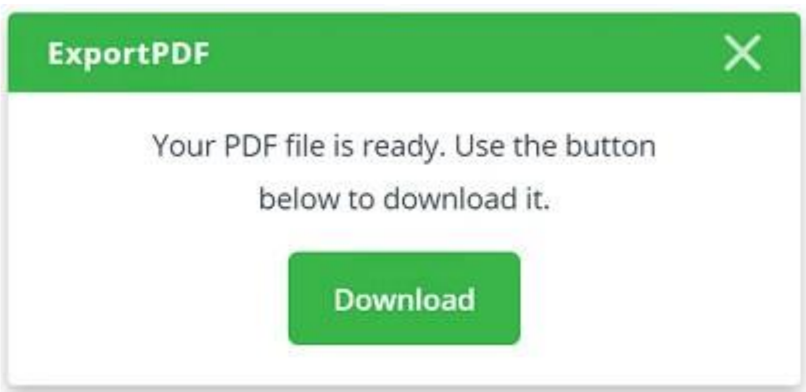
Click **Export** button to start the export. While an export is being executed, you cannot export again until it is complete; the export button will be disabled.

You should wait until the notification with **Download** button (see below) is shown. No notifications will be displayed (see below) if you navigate away.

The following notification is displayed when an export begins:

If an export task is taking longer than expected, the following message will be displayed:

When the export has complete, the following is displayed:



You can now click the **Download** button to download the generated PDF.

If a report has been unable to export within 10 minutes, it is assumed there has been an error and the following is displayed:

If another error occurs, a generic error notification will be displayed:

PDF Format

As well as the report data, each exported PDF file will show the title on the first page and have a header and footer on each page,

Example cover page:

Balance Sheet - With Hierarchy
Green Technologies, Inc.
Nov 11, 2022, 4:05:52 PM

Balance Sheet - With Hierarchy

Generated by: Deb Smith
Profile: Insight

Poweredby: Hubble reporting from insightsoftware

Product version: Hubble Web 22.3.1.23 for JDE
User: Deb Smith

Current selection:
Company: Green Technologies, Inc.
Business Unit: San Francisco, Los Angeles, New York, Boston, Chicago, Denver, Green Technologies, Inc.
Select Current Period: Cumulative May
Year: 2022
Ledger: Actual
Object Account: greater than Assets
Period: Cumulative April, Cumulative May
Year: 2022

Chapter 2: The Legacy Hub

What is the Legacy Hub?

The Legacy Hub is a dashboard for Hubble, where you can find shortcuts to the many features available in the product. It is the home page that provides overall visibility to what is happening within the application. It provides a quick glance at the items that may require your attention. The Legacy Hub is the default starting page unless you define a default workspace in your Preferences Settings.

The Legacy Hub is a series of cards that are fixed in their layout and arranged on a single screen, providing an easy way to navigate. These cards allow you to look at various items in Summary or Detail. By clicking on the icon in the lower right corner, you can switch from a summary to a detailed view. By clicking custom, you can determine your desired layout where some cards can be in summary and some in detailed view.

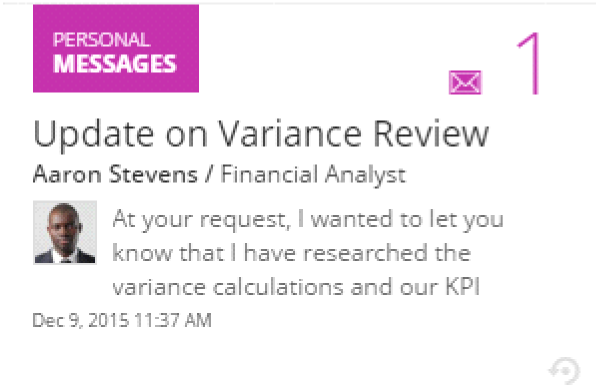
See what you want based on what is relevant to you!

Tour of the Hub

Legacy Hub Components

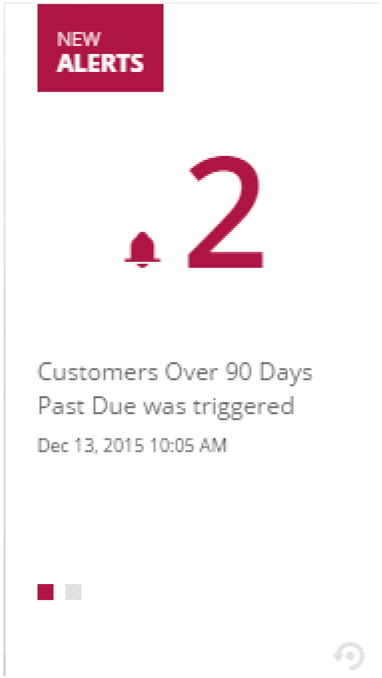
Messages

See your current unread messages. Messages are between Hubble users.



Alerts

If you create or subscribe to data-driven alerts, unread alerts are detailed here.



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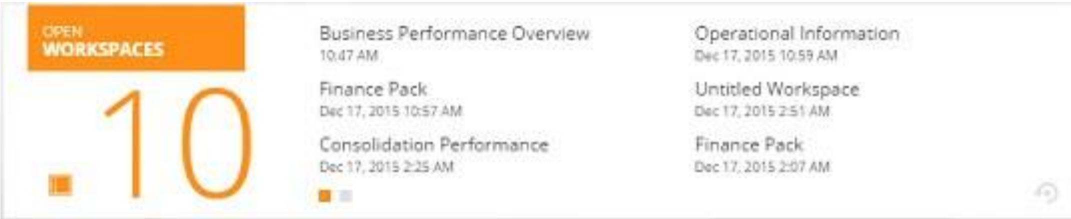
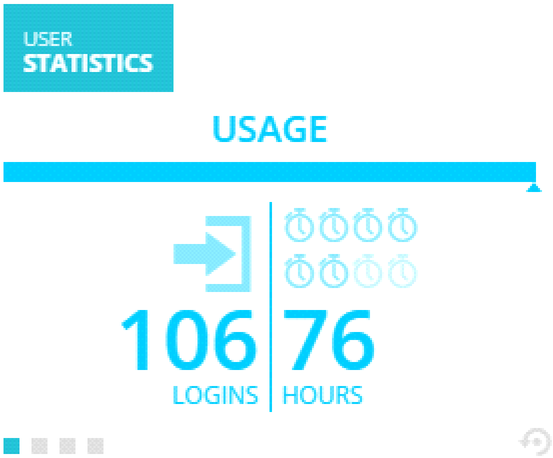
Open Workspaces

Gain quick access to any workspace you have open.



Statistics

View your Hubble usage statistics, productivity, collaboration and networking information.



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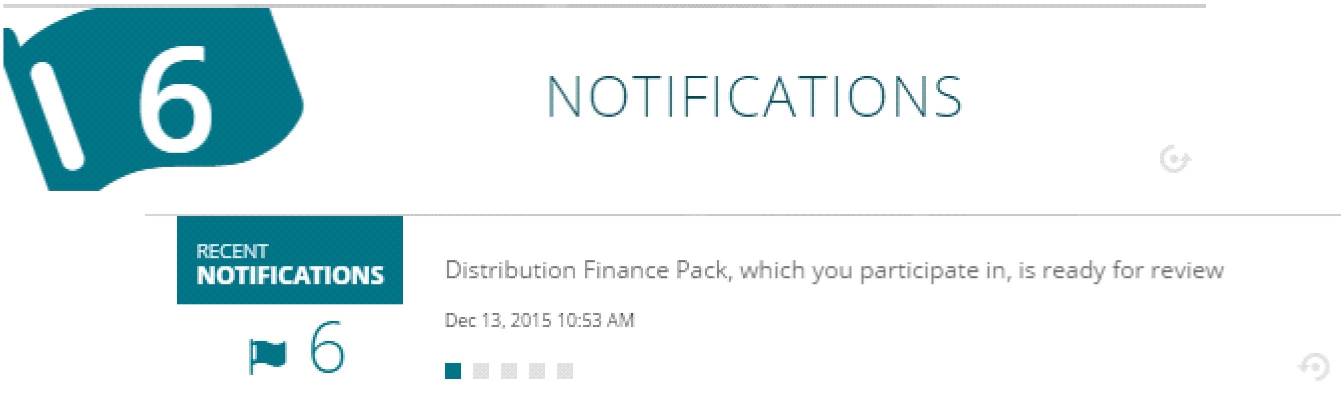
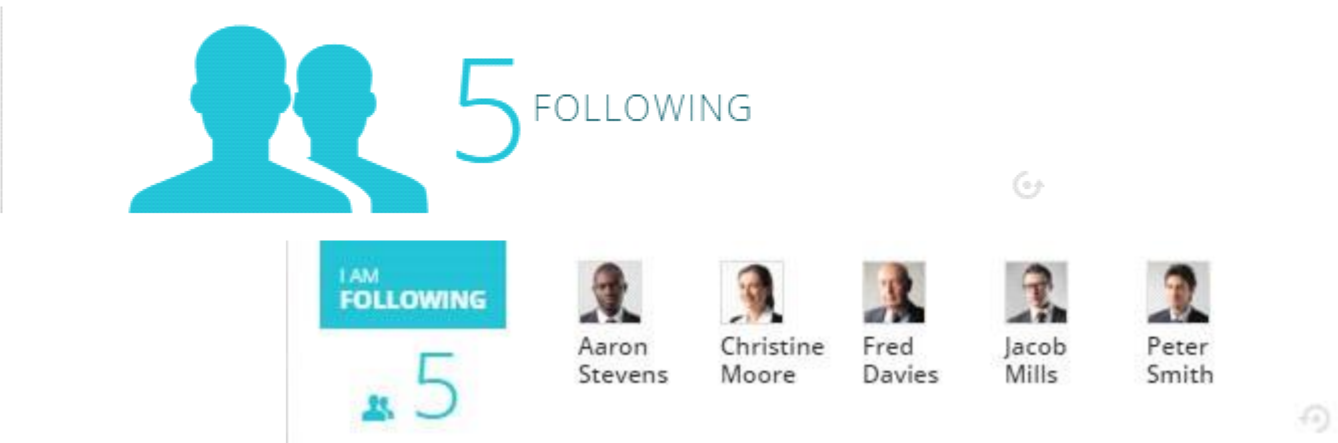
Notifications

Review messages about system events or other Hubble information that the system thinks you care about. Watch for workspaces that have been shared with you!



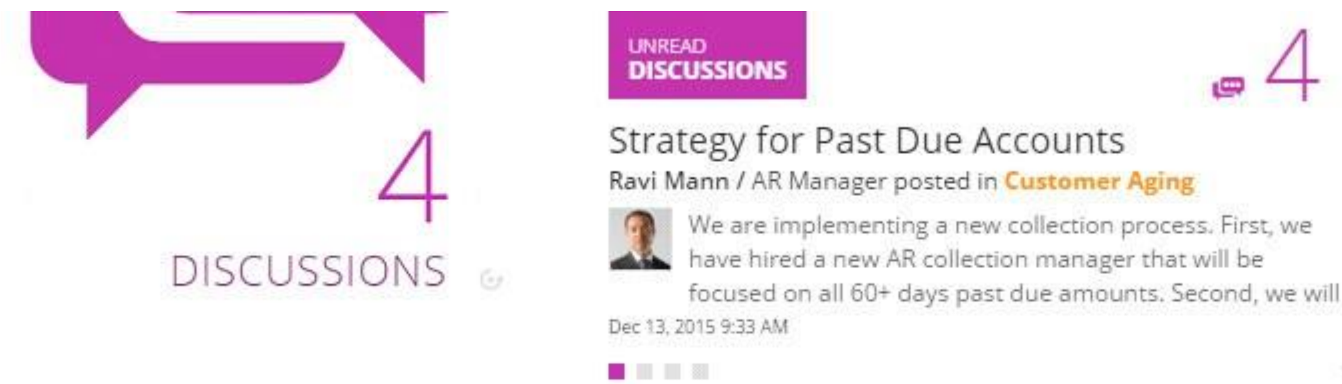
Following

See unread discussions for views or groups that you follow.



Discussions

See unread discussions for views or groups that you follow.



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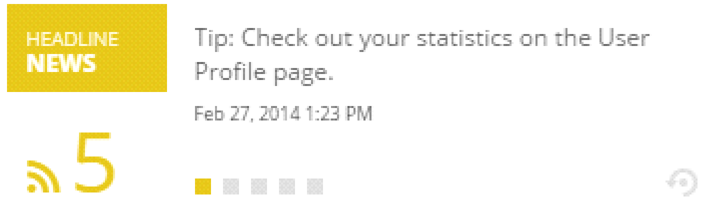
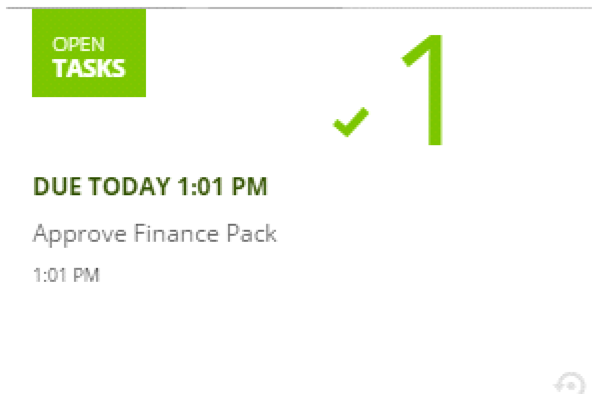
News

View published tips and information from insightsoftware.com.



Tasks

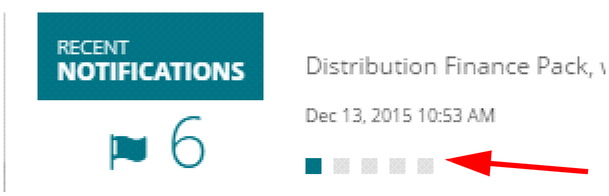
See your outstanding tasks including approvals and user-assigned tasks.



Legacy Hub Navigation Options

Select Page

Within some cards, move between pages by selecting the square boxes at the bottom of the Details window.



View Slider

The Summary, Detail and Custom options for your cards.

Card Flip

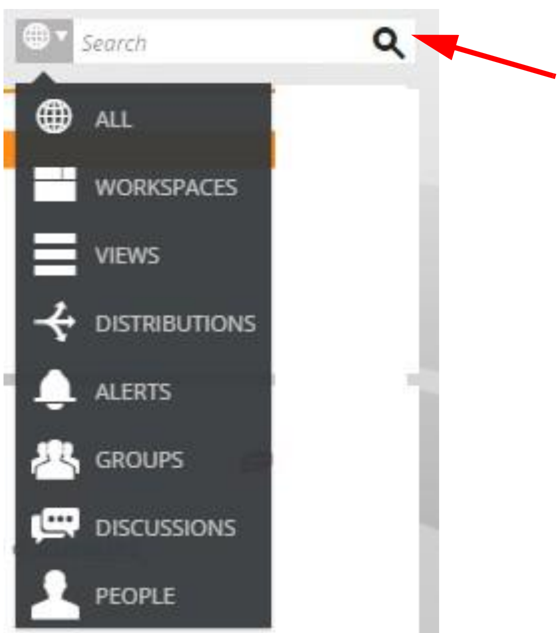
Flip from the Summary to the Details of the individual cards by clicking the right hand corner of the card. Once in Details Mode, you can drill down even further to the relevant item.

Badges

Badges are a visual representation of activity requiring your attention. These are color-coded to match the cards show in the Hub. In this example, there is 1 Warning, 6 Notifications, 2 Alerts, 1 Task, and 5 Communications (a combination of Messages and Discussions).

Search Bar/Window

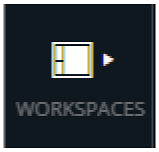
Do a global search within Hubble. Optionally, narrow down your search by clicking on the icon to the left of the Search Bar and selecting the specific item you are searching for.



Navigation Bar

The Navigation Bar, available from all screens in Hubble, has the following options:

Hub Icon - Returns you to the Legacy Hub from any other screen.

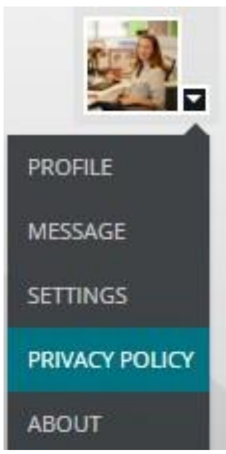


Workspaces Icon - Shows all your open workspaces.

Bookmarks - List of Bookmarks

Logout

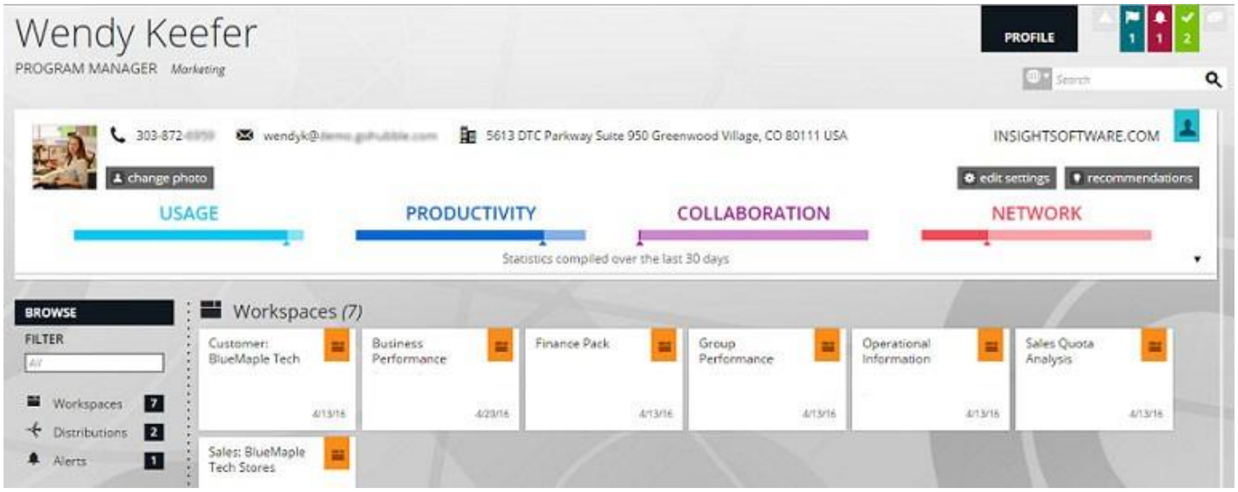
Profile Picture Drop-down Menu



In the upper right corner of every screen, you see your profile picture. The drop-down menu next to your profile picture has several options.

- **Profile** - Clicking on your picture itself or selecting **Profile** brings you to your profile, where you can change your picture, see your personal information such as phone number, email address and work address. You see your statistics based on your use of Hubble.

You also see all your workspaces, distributions, and alerts, and can search for them from here using the filter.

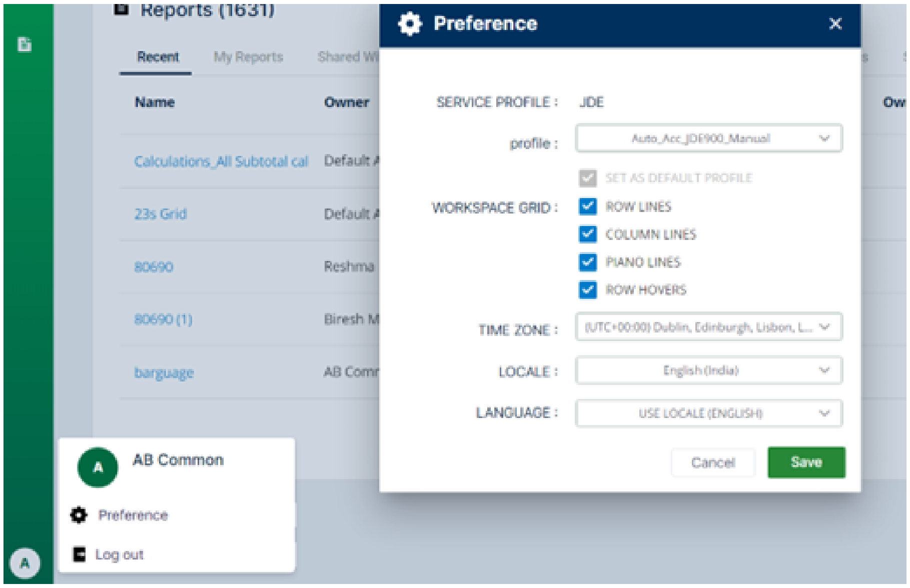


Include your real picture in your profile. Pictures are very important to help people connect.

- **Message** - Send personal messages to other Hubble users. See Personal Messages.

- **Settings** - Set various settings including:
  - **Personal Details** - Personal, company and contact information.
  - **Preferences** - Default profile to be used when logging in to the application, default start page, theme, background, grid display settings (see below), time zone, locale, and language.

    The Version 23.4 of Hubble moves the option to the sidebar of the homepage, providing users with easier access. You can edit a Profile and set the Time Zone, Locale, and Language settings from the sidebar preference setting.



Note: The ability to change Workspace Grid settings will be released in version 24.1. Until then, the preference setting will be also available in the previous location (Old Hub) and can still be used to set the workspace grid settings.

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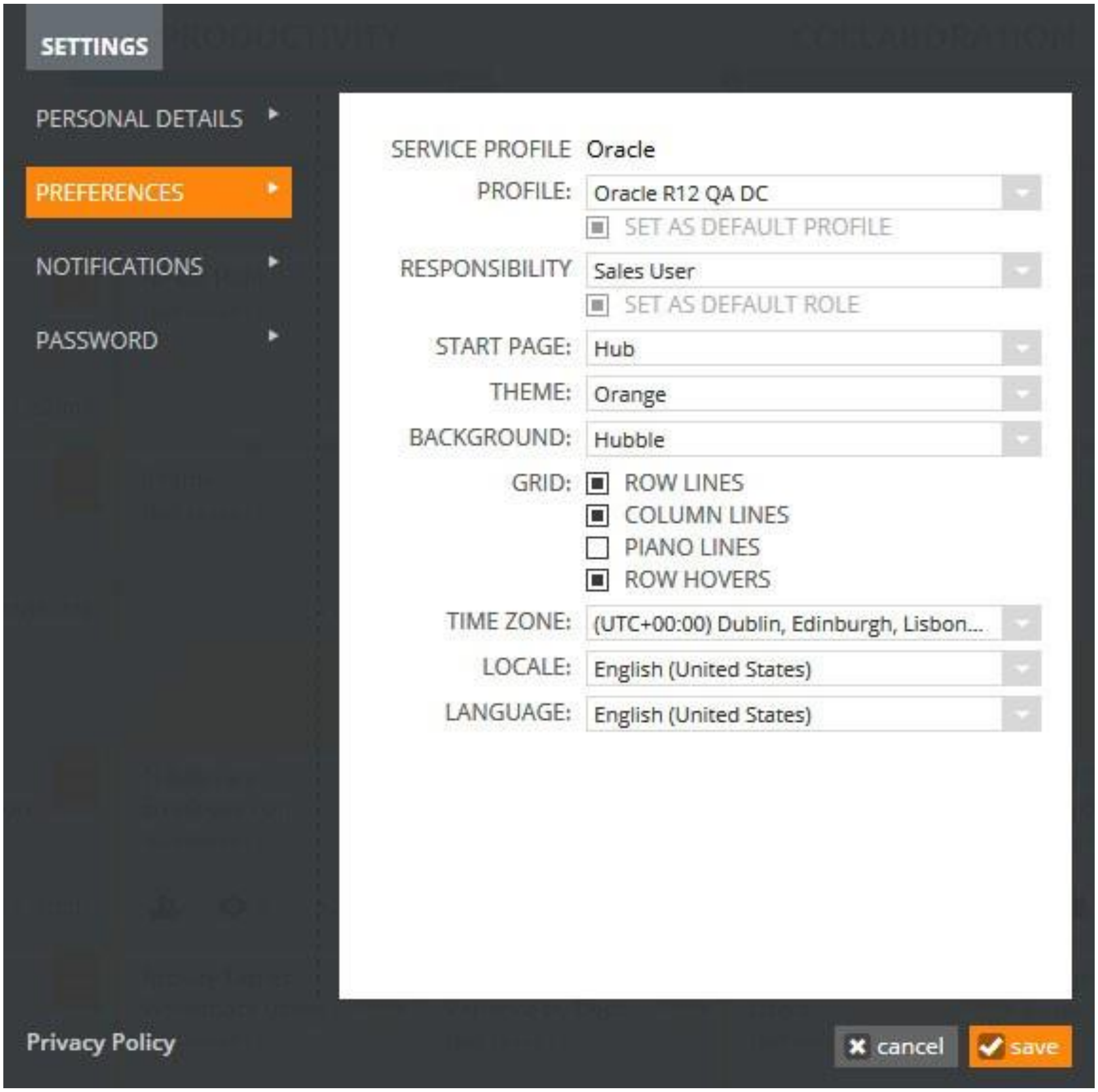
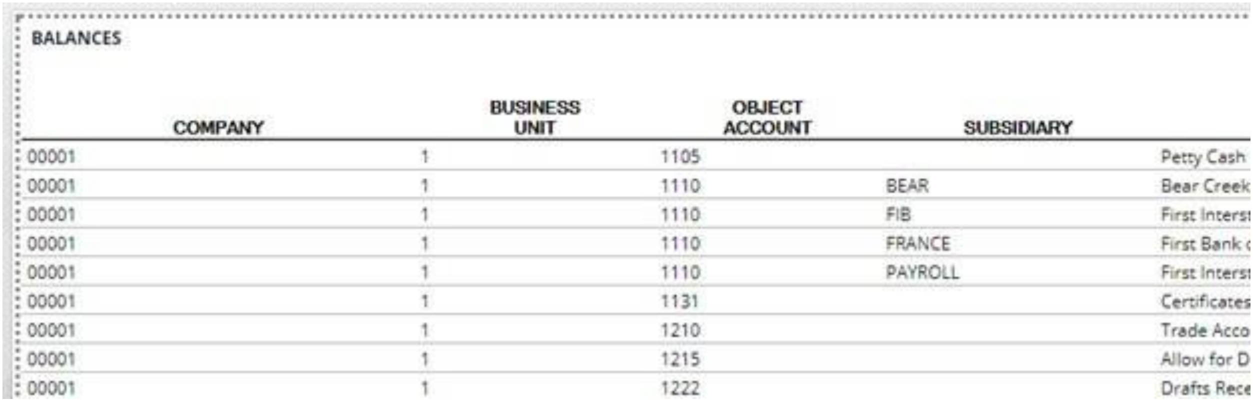


See **Localization in Hubble Web** for more details of the Locale and Language settings in Hubble Web.

> **Grid** - To make it easier to read a large amounts of grid data, table cells can be separated by row and column lines (default report styles do not separate cells), piano line shading may be added, and rows highlighted when the mouse is hovered over them.
> The four options are all enabled by default.

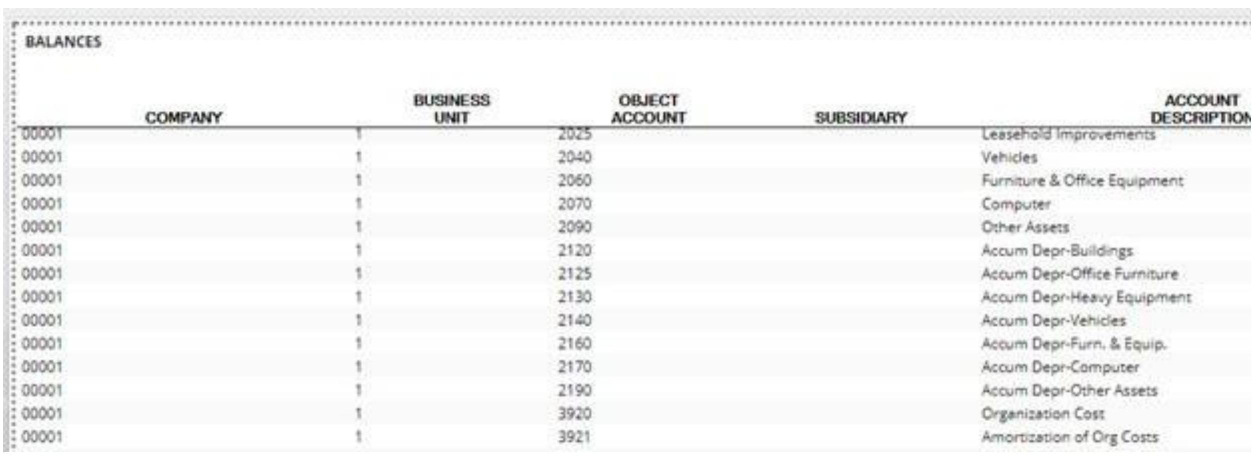
Example of a grid with row lines switched on:



BALANCES

COMPANY	BUSINESS UNIT	OBJECT ACCOUNT	SUBSIDIARY	
00001	1	1105		Petty Cash
00001	1	1110	BEAR	Bear Creek
00001	1	1110	FIB	First Interst
00001	1	1110	FRANCE	First Bank c
00001	1	1110	PAYROLL	First Interst
00001	1	1131		Certificates
00001	1	1210		Trade Acco
00001	1	1215		Allow for D
00001	1	1222		Drafts Rece

Example of a grid with piano lines switched on:



BALANCES

COMPANY	BUSINESS UNIT	OBJECT ACCOUNT	SUBSIDIARY	ACCOUNT DESCRIPTION
00001	1	2025		Leasehold Improvements
00001	1	2040		Vehicles
00001	1	2060		Furniture & Office Equipment
00001	1	2070		Computer
00001	1	2090		Other Assets
00001	1	2120		Accum Depr-Buildings
00001	1	2125		Accum Depr-Office Furniture
00001	1	2130		Accum Depr-Heavy Equipment
00001	1	2140		Accum Depr-Vehicles
00001	1	2160		Accum Depr-Furn. & Equip.
00001	1	2170		Accum Depr-Computer
00001	1	2190		Accum Depr-Other Assets
00001	1	3920		Organization Cost
00001	1	3921		Amortization of Org Costs

The cell borders and piano lines added by these options are only visible in the Web interface. They will not be included in reports exported to Excel or PDF (the reports themselves are not edited, only how they are displayed in Hubble Web).

Grid lines do not override border styles for the report views that were specified with custom border styles.

- **Notifications** - Events you wish to be notified about via email. See Notifications.
- **Password** - Used to change your password.

Localization in Hubble Web

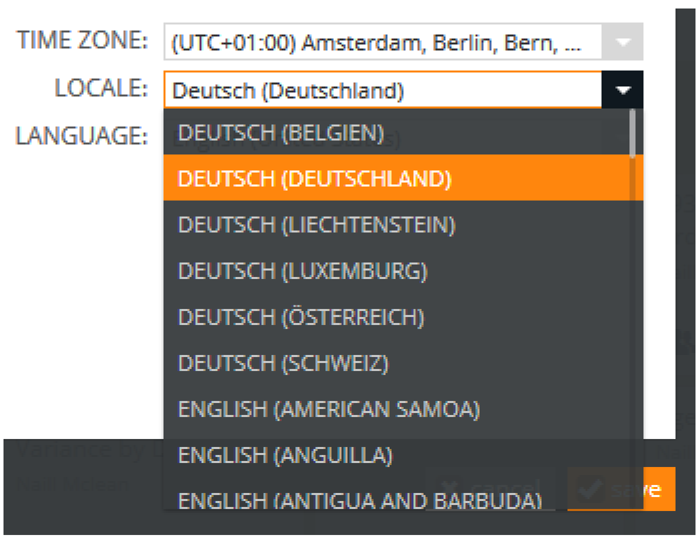
The **Locale** setting allows you to view numbers and dates in Hubble Web in the format of your choice. The **Language** setting gives you the ability to view the Web version in your native language.

The exception to this is that language that the contents of reports are in is not set in Hubble Web. It is controlled by user preference settings in Hubble Desktop and/or the Administration tool. Refer to their user guides for details.

The following languages are available:

- Arabic
- Brazilian Portuguese
- German
- Dutch
- English (United St)
- French
- Hungarian
- Italian
- Japanese
- Portuguese
- Simplified Chinese
- Spanish

To set locale and language, after logging into Hubble, the navigate to the **Preferences** dialog as described above. Select required locale from the **Locale** drop-down. For example, 'DEUTSCH (DEUTSCHLAND)':



Select a language from the Language drop-down.

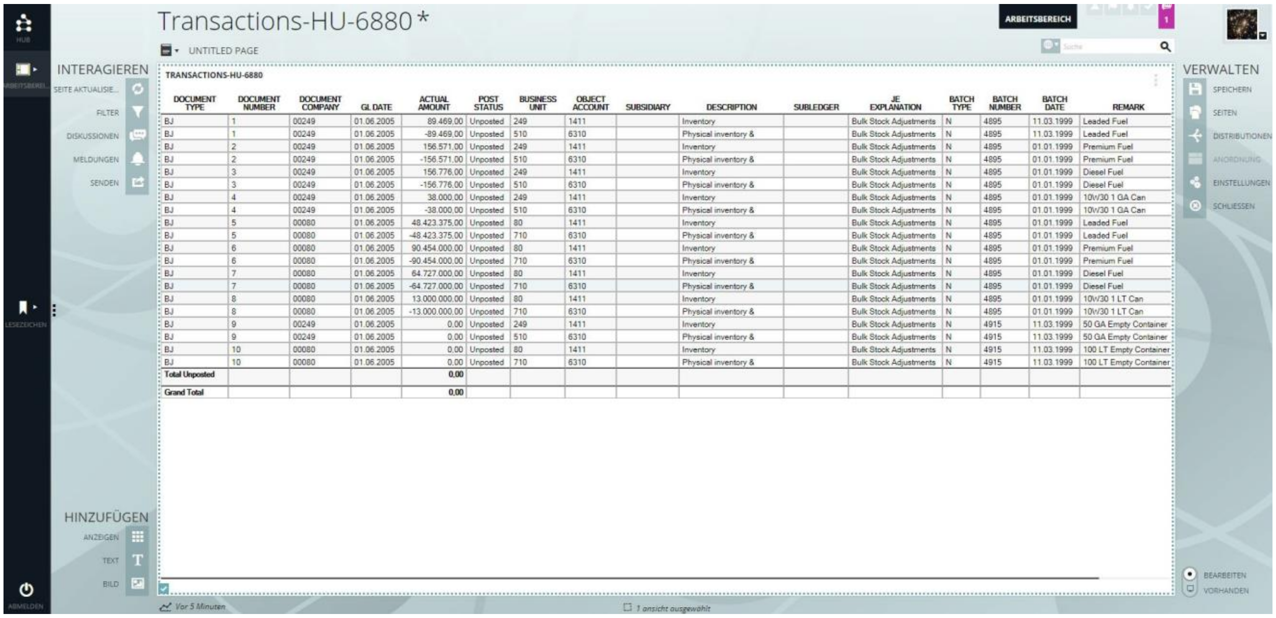
The first option in the drop-down 'USE LOCALE (language)' enable you to set the language based on the Locale setting you chose.

For example, if you chose 'USE LOCALE (DEUTSCH)' from the **Locale** list both the **Language** will automatically be set to the Deutsch (German) language.

In order for the setting to take affect, you must first log out and then in again (you will be prompted to do so when you press **Save**).

Once you log back in, the Hubble Web interface will be displayed selected language.

The format of dates and numbers in reports also reflect the setting. For example, in this case numbers are displayed in 1.234.567,89 format and dates are displayed in the dd.mm.yyyy format.



If a language is selected from the **Language** list instead of 'USE LOCALE', the Web interface will be displayed in that language instead. The format of dates and numbers will still reflect the selection made from the **Locale** list.

Also note that:

- You will receive notification messages, etc. translated into the selected language.

- PDFs are exported in the selected language.

Setting the Language and Locale for new Users

New users of Hubble web can set their **Locale** in the **Preferences** section of their user settings (accessed from the **Profile Picture Drop-down Menu**). The default locale and language is ENGLISH (United States).

When you load Hubble web the first time, the login page will be displayed in your browser language. This will also happen after you clear your browser cache/cookies. Once you log out and then log back in, the selected language setting will be applied and the Login page will be displayed in the selected language.

Chapter 3: Workspaces and Views

Workspace Overview

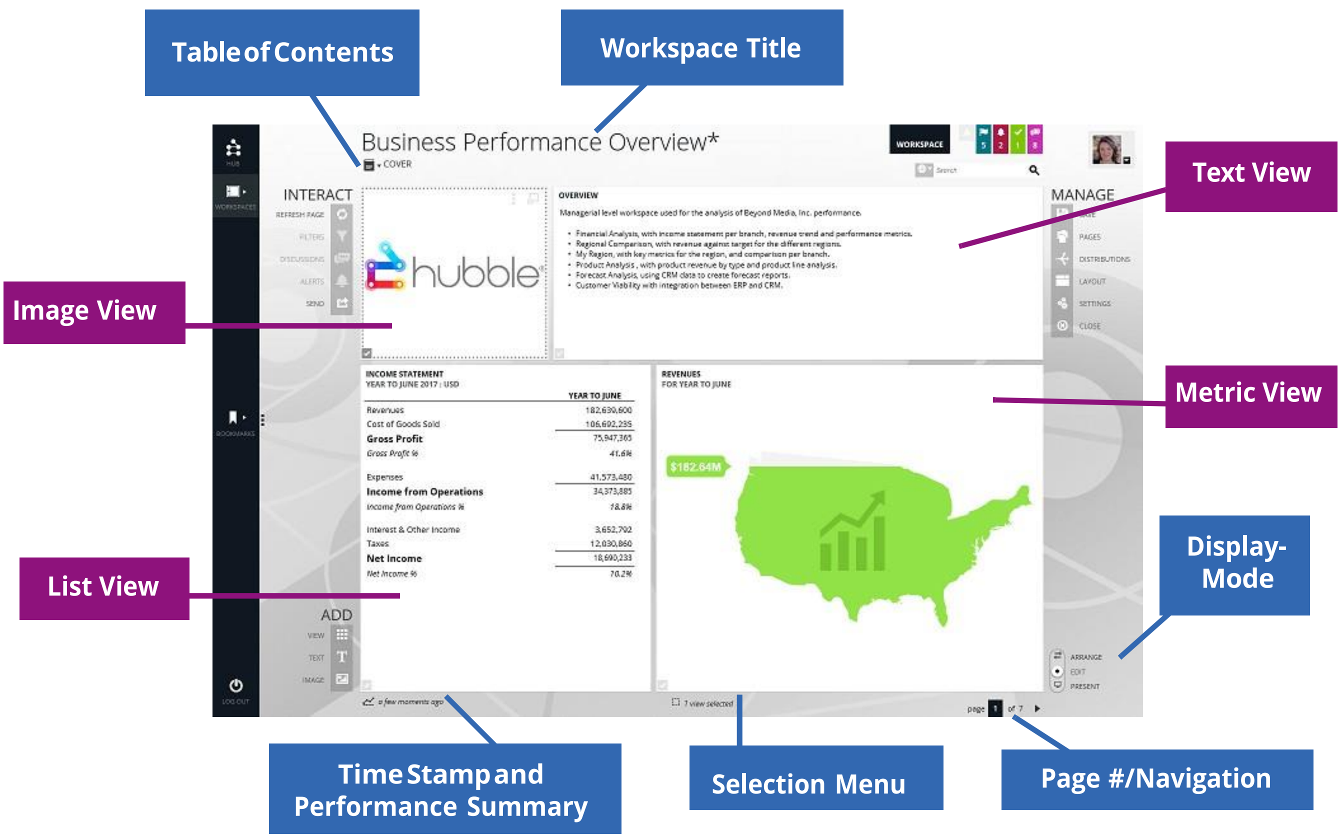
A workspace is a multi-page dashboard. Within Hubble you can have many workspaces, created just as you want so you can see the information that is relevant to you. Each user can have multiple workspaces, and each workspace can have many pages. Within a page, you can have up to 8 panels in a variety of layouts. A view, which is a pre-created presentation of information, goes into each panel.

An entirely new interface for viewing, creating and editing workspaces is currently being designed. A preview of the “work in progress” design can be viewed by clicking the **Click here to test our new workspace design** link, which is below the **Manage Menu**. Beneath this link, an email address is displayed, which you can use to submit feedback on the new design.

For more details, see the Hubble 23.1 Release Notes.

Here are two examples of a workspace:

The components to a workspace include:



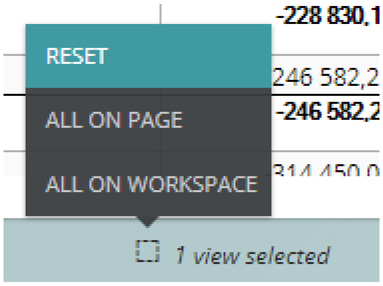
- **Table of Contents** - Shows you all the pages in your workspace as well as which views are incorporated in the workspace. You can use the scroll bar to move through the list. This is automatically created.

- **Workspace Title** - Shown across the top, this is the title for the entire workspace.
- **Display Mode** - Arrange Mode, which is available only for tablets, is used to expand the margins between workspaces for easier navigation. It allows you to resize and rearrange the views on the workspace. When in Edit Mode, PC users can use the mouse to resize and rearrange the views on the workspace. When a double line shows around the view, you can resize it. When the 4-way arrow displays around a view, you can rearrange it by dragging and dropping. When in Arrange or Edit Mode, the screen does not auto refresh unless filters are changed or you request a refresh. When in Present Mode, you cannot modify the workspace; you can only rearrange or resize. In this mode, the page will auto refresh within the interval you have designated as determined in the Workspace Settings.

Turn on Present Mode to avoid a timeout. Timeout in Arrange or Edit Mode is 30 minutes; however, this can be modified for the entire company.

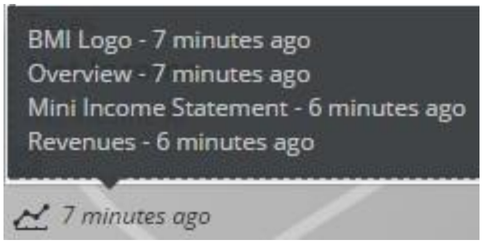
- **Pages/Navigation -** See the number of pages in your workspace. Using the arrow, navigate through the pages. Each page can have a different number of views and a distinct layout.
- **Selection Menu -** Shows how many views are selected, or whether all the views on the current page or of the entire workspace are selected. Click on a view to select it. Notice the gray dots

around the view once it is selected. To multi-select, press the Ctrl key while clicking. This is particularly helpful when you want to update the filters on multiple views at the same time. You can click the Selection Menu to reset (which de-selects the selected views) or select all the views on the page or in the workspace at once.



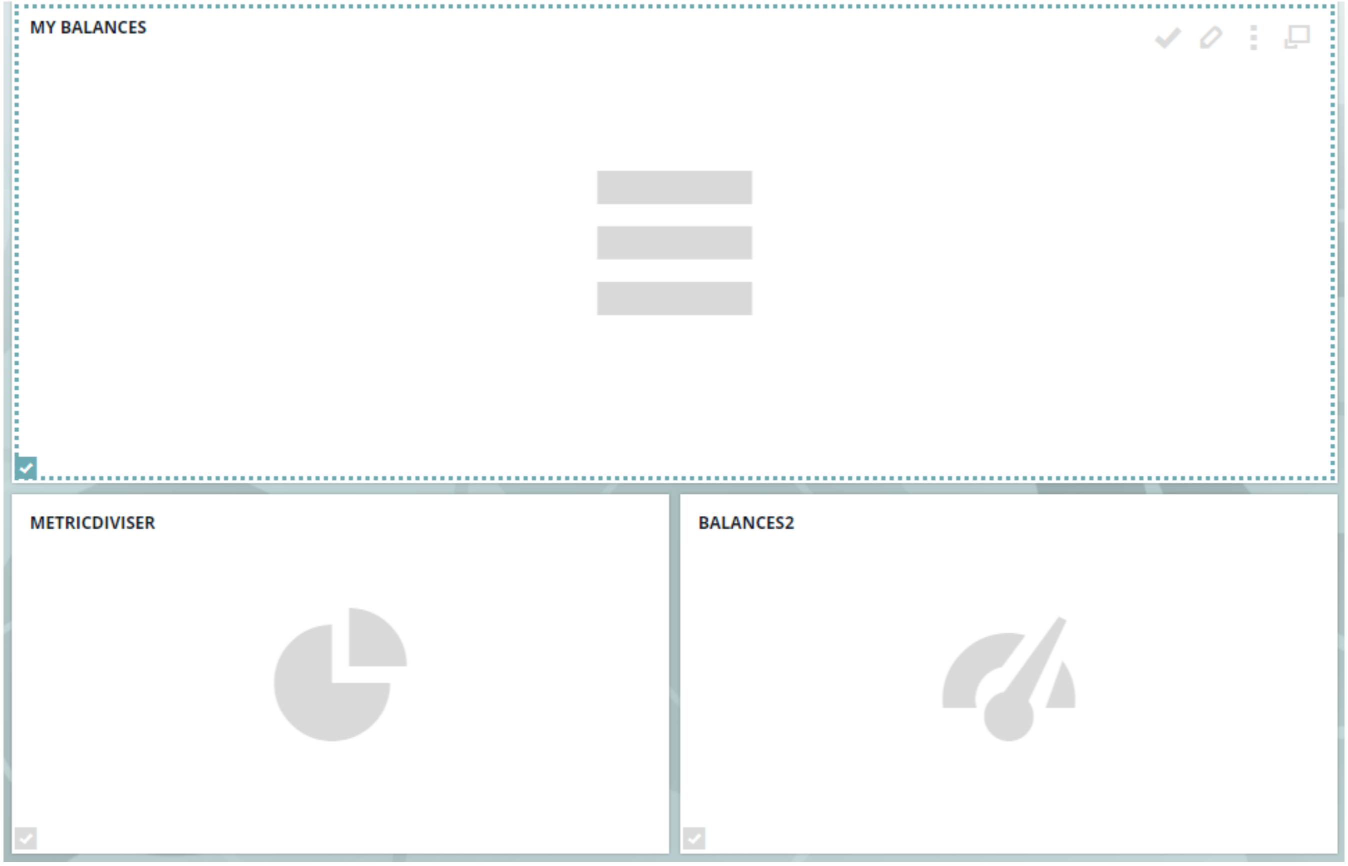
The selection menu is also available on the **Filters** list (see **Filters**).

- **Time Stamp and Performance Summary** - Shows when the data was last refreshed. Hovering over it, you see all the views on the workspace with their latest refresh time.



Running and Refreshing Workspace Views

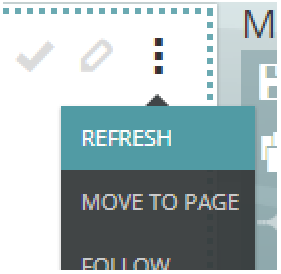
By default, when a workspace is opened, the List, Chart and Metric views in the workspace are not populated with data. The title and sub-titles of such views are displayed along with graphical placeholders which illustrate the view type:



This enables you to filter data to be displayed in the workspace before "running" it. See **Filters** for details.

To retrieve and display the data for all the List, Chart and Metric views on a page, click the **Run** button on the **Interact Menu**,

To retrieve and display the data for a single view, click the **Refresh** option on its **View Options** menu.



Setting a Workspace to "Auto-Run"

If required, a workspace can be set to "auto-run", i.e. retrieve and display view data automatically when it is opened. This is set using the **Workspace Settings** window, which is accessed from the **Manage Menu**.

If a workspace is set to "auto-run", the **Interact** menu will include a **Refresh** button instead of a **Run** button.

Note that while the default setting for all workspace is not to auto-run, if required this can be changed during installation so that all workspaces instead auto-run by default. Refer to the Hubble Supplementary Deployment Topics guide for details.

Interact Menu

The **Interact** menu is on the left side of the workspace.

The options available here are the following:

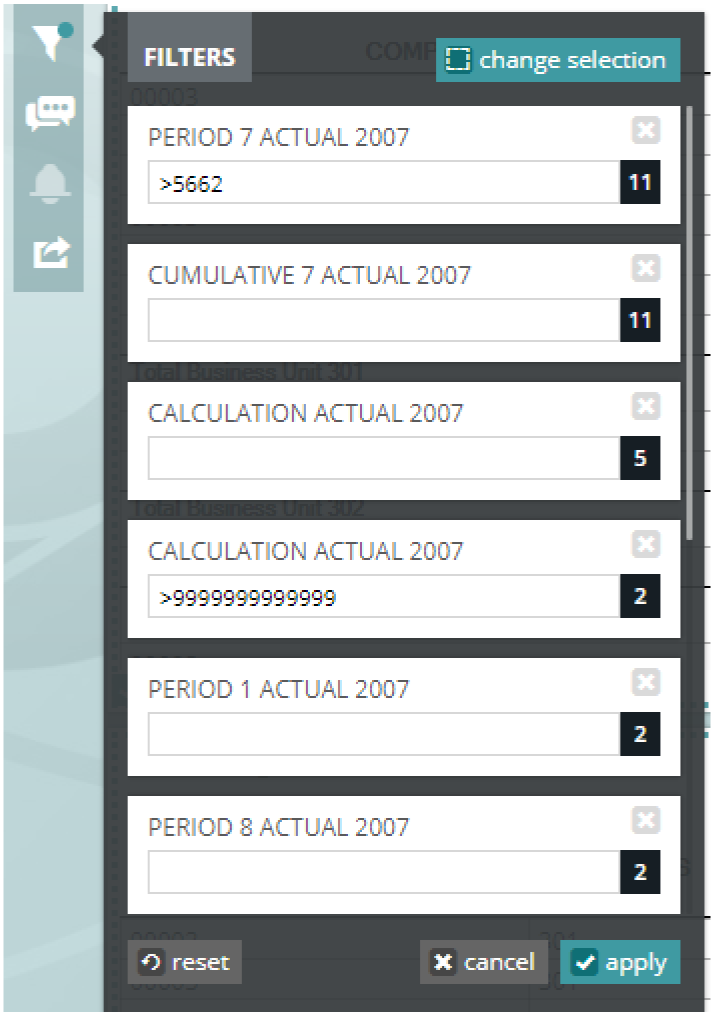
- **Run Page** or **Refresh Page:**
  - If the workspace is not set to "Auto-Run" (the default) the menu will include a **Run Page** button to "Run" all the views in the current workspace page, i.e. retrieve and display the view data.
  - If the workspace is set to "Auto-Run" instead of a **Run Page** button there will be a **Refresh Page** button used to simultaneously refresh all view data in a page,

  See **Running and Refreshing Workspace Views** for further information. Notice how the time stamp in the lower left corner is updated when a page is run or refreshed.
- **Filters** - Narrow down the search criteria in the selected views. The filters available to Viewer users are those that have been designated by the Designer or Power user. See **Filters** for further details.
- **Discussions** - Conversation connected to the data being shown. See **Discussions**.
- **Alerts** - Data-driven exceptions connected to the data. See **Alerts**.
- **Send** - Send a workspace to another Hubble user. The workspace itself can be shared so the user can open it and save it, or it can be shared as a PDF document.

Filters

Use filters to narrow down the search criteria in the selected views. The filters available to Viewer users are those that have been designated by the Designer or Power user.

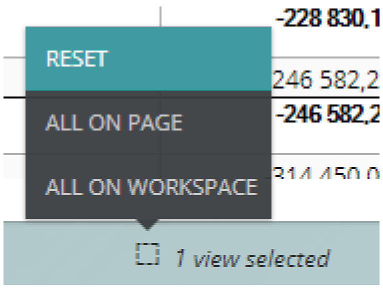
Select the **Filters** option from the **Interact** menu to the view the filters list.



- When you have multiple views selected and go to **Filters**, by default you see the filters common to the selected views. The number to the right of the filters shows you the number of views that share that common filter.
- Common filters must have the same name.
- Use the **Change Selection** menu (see below) to select all the views on the current page or in the entire workspace. The list of filters will change accordingly.
- You can search in filters by the description of the values or the value code.
- You can use ranges (by using a colon) and multiple values (by using a comma).
- After adding a value, hit enter.
- You can have drop-down lists from which to choose a value if the report designer set up the filter this way.
- Blue dots next to a filter means that it has been changed.
- Optionally you can show/hide the read-only filters.
- There is not a Query By Example (QBE) line.

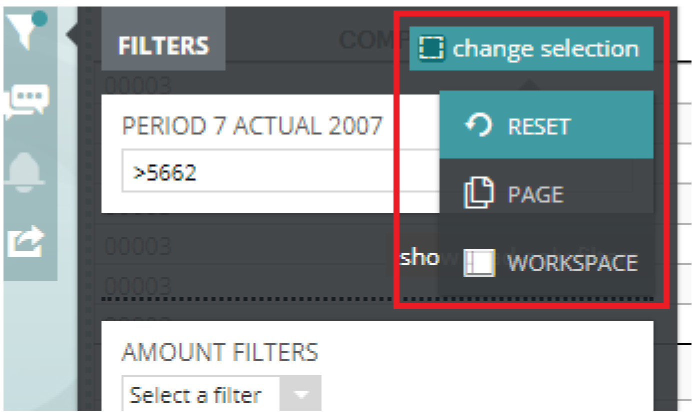
Viewing the Filters from all the Views on a Workspace

By default, only those views common to the selected views on the current workspace page are shown in the Filters list. To list all filters in the workspace or on the current page, common or not, either select the **All on Workspace** option from the view selection menu at the bottom of the workspace:



Then open the **Filters** list again.

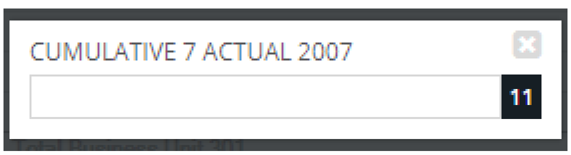
Or, select the **All on Workspace** option from the **Change Selection** menu on the **Filters** list:



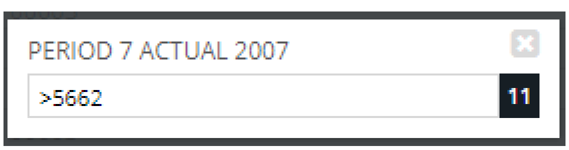
All the available, modifiable filters for all the views in the workspace will be displayed.

Each filter will be in one of the following states:

- **Clear**: No value is set for this filter in any view in the workspace.



- **Displaying a particular value or values**: All views in the workspace with that filter have the same value applied to them.



- **[Multiple values]**: Different views have difference values set for that particular filter.

Setting and Clearing and the Value for a Filter in all Views in a Workspace

When all the views in a workspace are selected (see above), setting the value for a filter in any state and clicking **Apply** will set the filter to that value for all the views on the workspace that have that filter.

When all the views in a workspace are selected, clicking cross icon button for that filter will clear that filter of all values for ll the views on the workspace that have that filter.

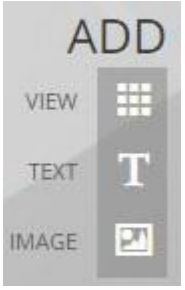
Limitations on RIO Filters

As well as "normal" filters, RIO (Reusable Inquiry Object) filters can be made available on Hubble reports (refer to the Power and Designer User Guide for details). The following limitations apply:

- Currently, if a RIO enabled filter is set to update right away and applied, the filters section will not show as modified (no reset button and no "blue dot" to signify modification of the default filters). Any other modification of a filter (including selecting a value for a RIO filter and not checking the update box) will result in a reset button and "blue dot" being shown, which will not be possible to remove until filters are reset. This will be the case even if you change just the RIO filter and then update it later, meaning that the filters are set back to the default. The "blue dot" and reset button will remain until you reset the filters, even though the reset will keep them the same if RIO filter is changed only.
- If you choose an option for a RIO filter and choose not to update (i.e. you uncheck the box), that workspace only will change the value. If you then decide to update after applying by checking the box only, this will not update RIO. You will need to re-select the same option/value then check the box and click **Apply** again to save new value into RIO for that filter.
- If you refresh the workspace that contains a view with a recently updated RIO selector, that view may not reflect the change if the standard refresh time has not been reached yet. The only way this can be updated in this case is to close and create another workspace to re-add the view or logout and login again then after opening the workspace, click on refresh to reload the page. Any filters that have been modified without saving back to RIO will not update if a RIO change is made from another instance of the view/report from a different workspace or Designer. The reset button will need to be selected/clicked to pick up this change.
- Relative selectors are not updated when a web selector is changed.

Add Menu

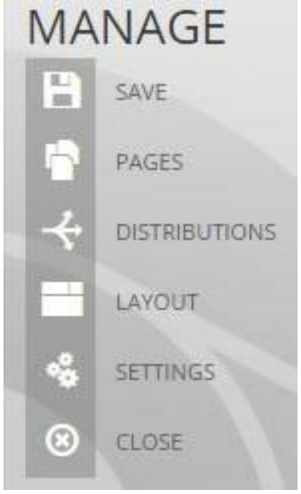
The **Add** Menu is on the lower left side of the workspace.



From this menu, you can quickly add a view, text or image to the current workspace.

Manage Menu

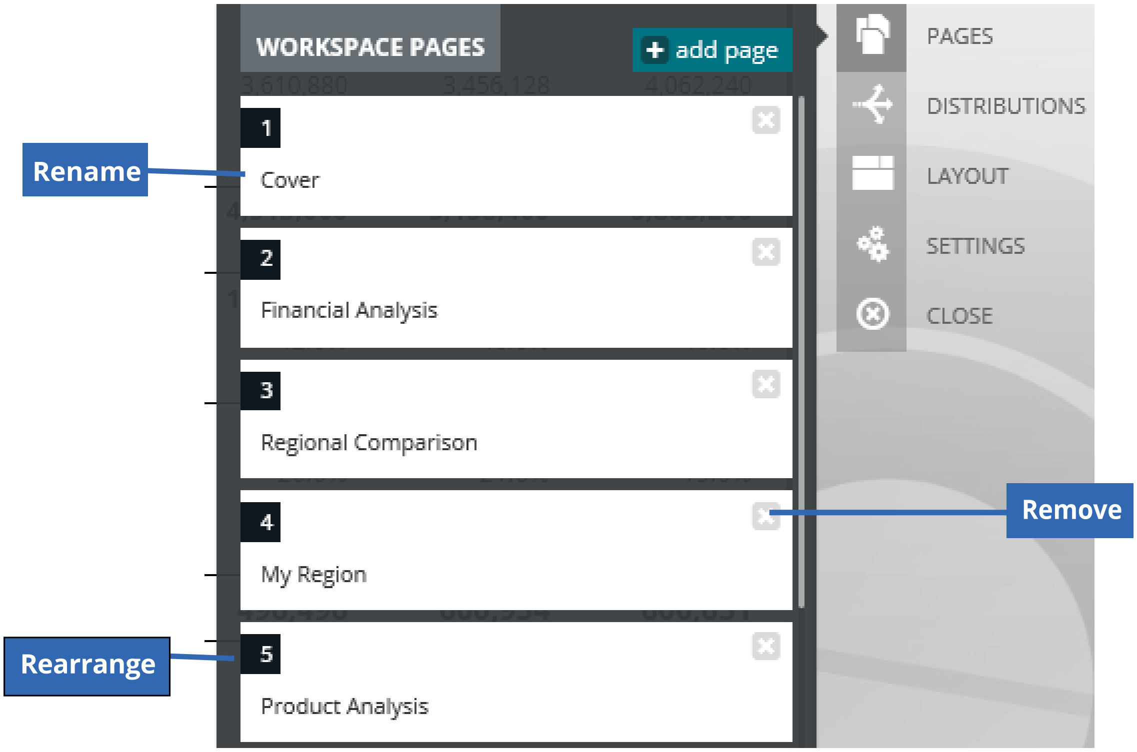
The Manage Menu is on the right side of the workspace.



The following options are available from this menu:

- **Save** - Save a workspace to the repository. It is saved in the owner's custom folder and can be shared with other Hubble users. If you have made any changes to the workspace, whether it is the layout, filter or contents, you will see an asterisk (*) by the name of the workspace. This indicates there are unsaved changes.
- **Pages** - You can have unlimited pages in a workspace. From here you can add a title to a page, remove a page and rearrange the pages. To rename, click on the current name and change it as

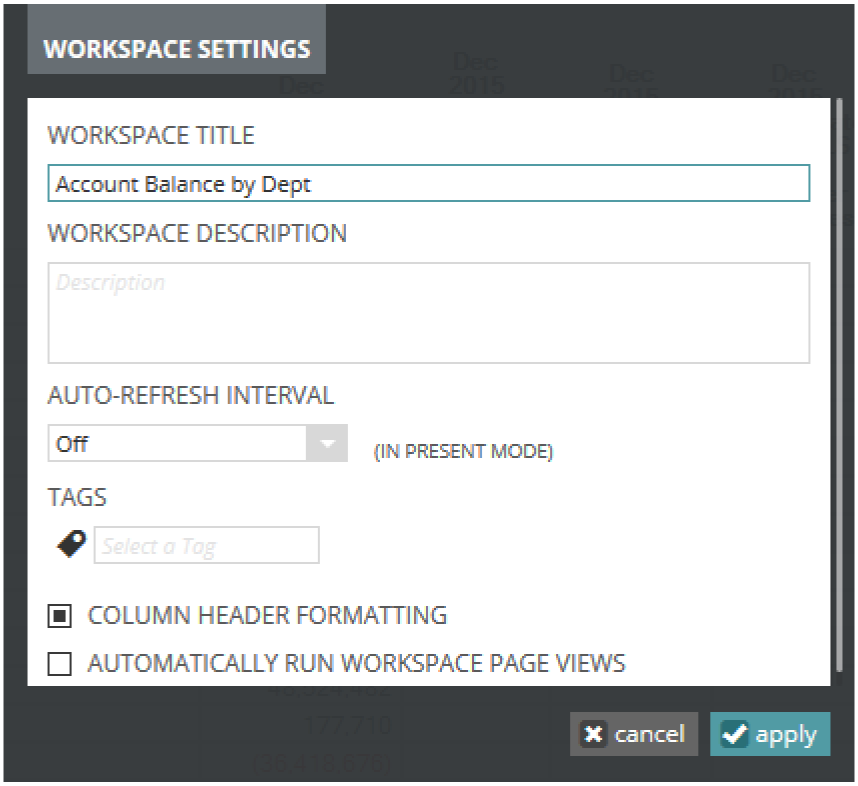
desired. To rearrange the pages, click on the page number and drag it up or down. To remove a page, click on the X icon.



- **Distributions** - Set up approval workflows. See **Distributions**.
- **Layout** - Once views have been added to a page within the workspace, you can change the layout of the page. From there you can resize and rearrange the panels within the page.

- **Settings** - Opens the **Workspace Settings** window. Using this you can add a workspace title and description, set the auto-refresh interval that is used when in Present Mode, and set views in the workspace to "auto-run" when you open it (see **Running and Refreshing Workspace Views**).

You can also add tags to your workspace, and enable (or disable) column header formatting in its reports.



- **Close** - Close the workspace. If there are unsaved changes, you will be prompted to save the workspace after clicking **Close**. After closing a workspace, you are returned to the Hub.

Best Practices for Workspaces:

- If an item requires action, set up an alert for it.
- Use the table of contents to navigate through your workspace.
- Unless you are creating workspaces with images, limit the number of views to 5 or 6 views per workspace.
- Always add titles and descriptions where you can. These are searchable.
- Tags are searchable, so use these as much as you can.

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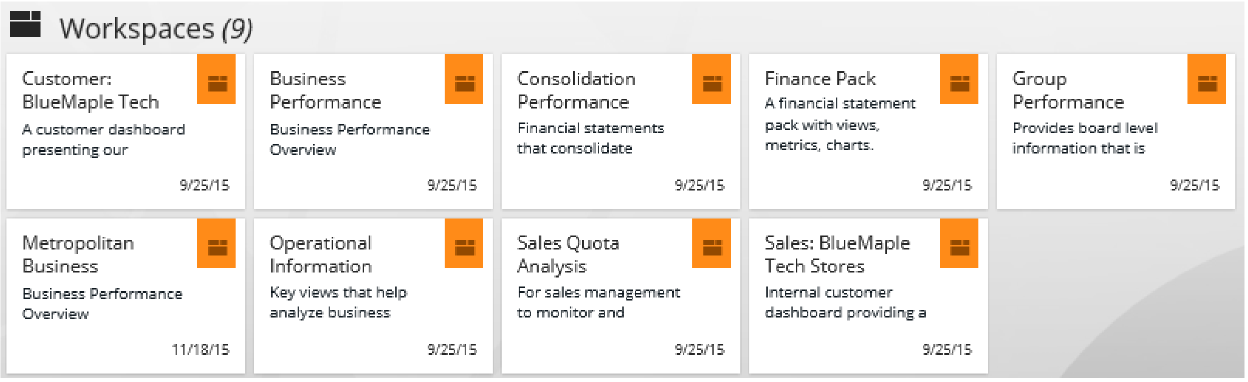
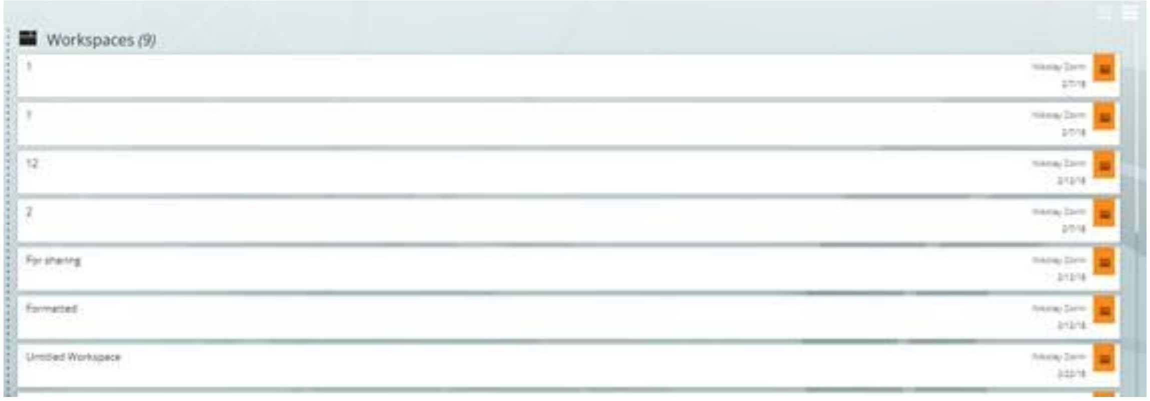
Open a Workspace

There are three ways to open an existing workspace:

1. **Search** - Open and closed workspaces are listed here:



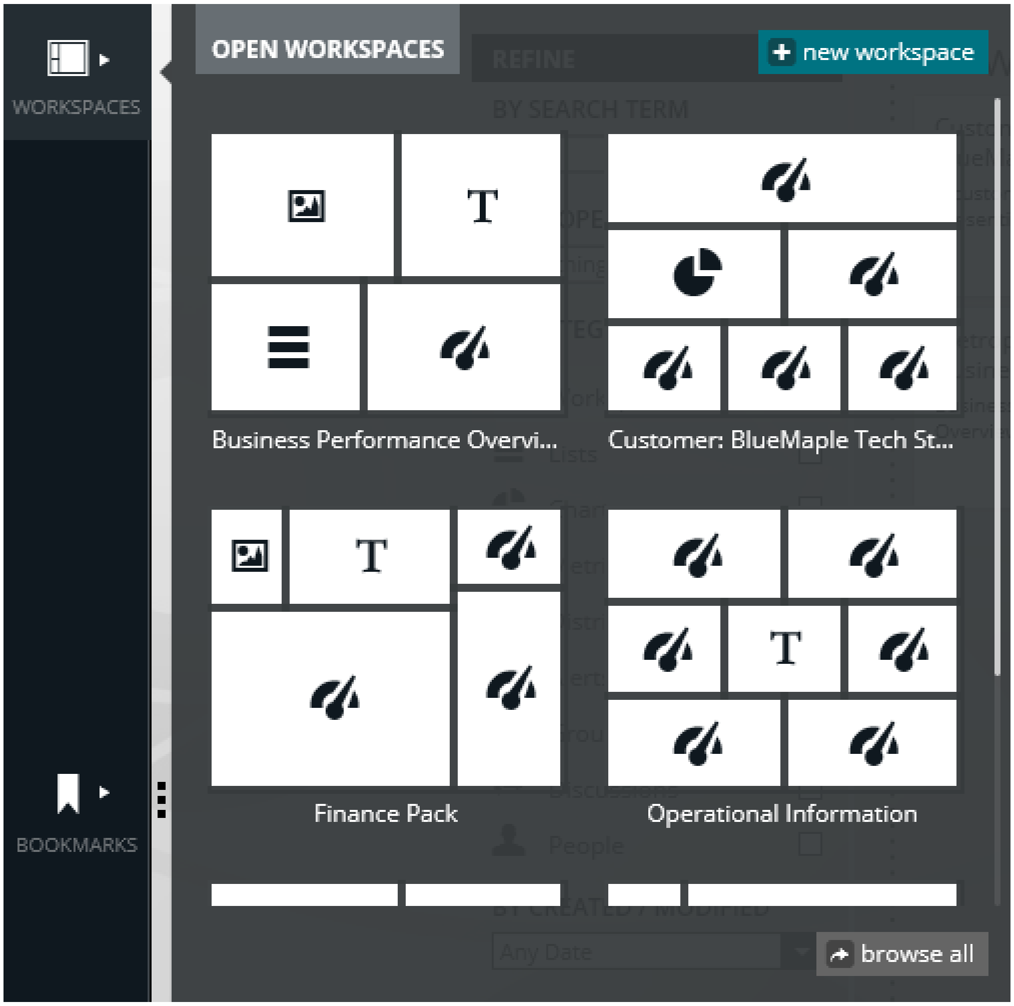
Search results can be displayed as tiles (the default mode - see above), and listed vertically in a format that fills the width of the search results area.



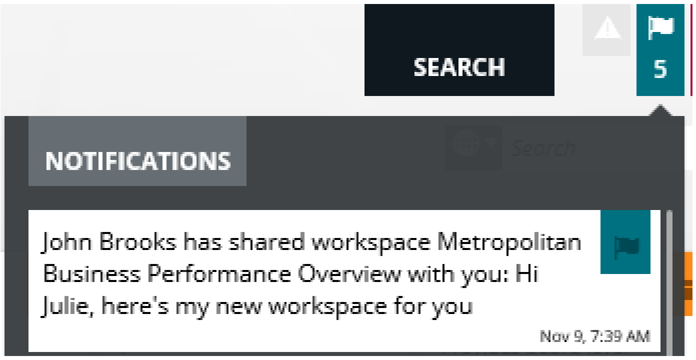
Switch between the two modes using the buttons above and to the right of the search results:

A search facility is also available on the **Home** page (see **Hub Search Facilities**).

2. **Workspace Menu** - Open workspaces are listed here:



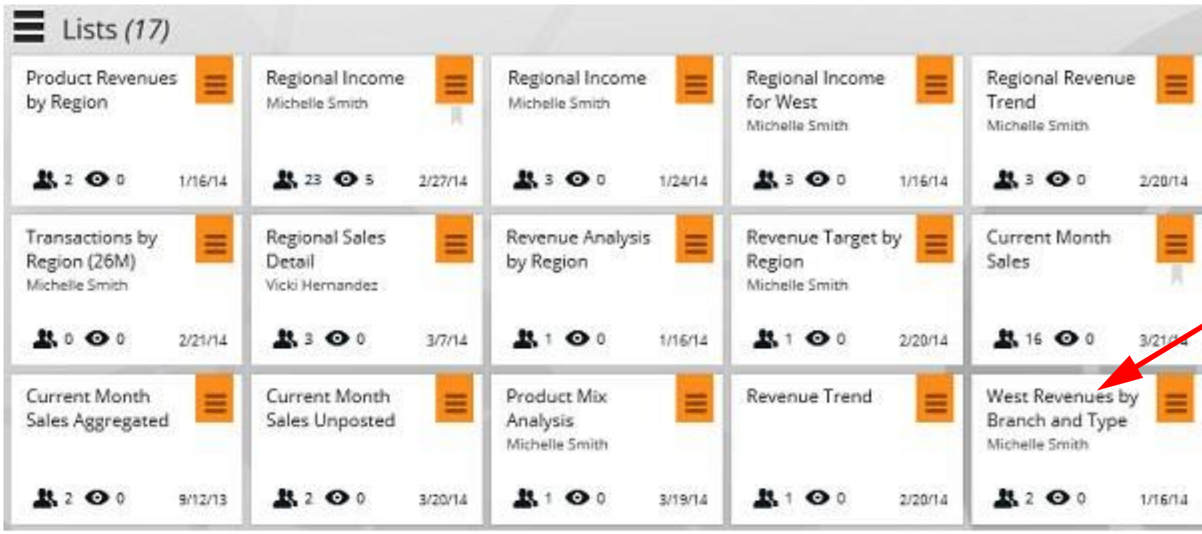
3. **Shared Workspaces** - When workspaces are shared with you, they appear in notifications.



Creating a Workspace

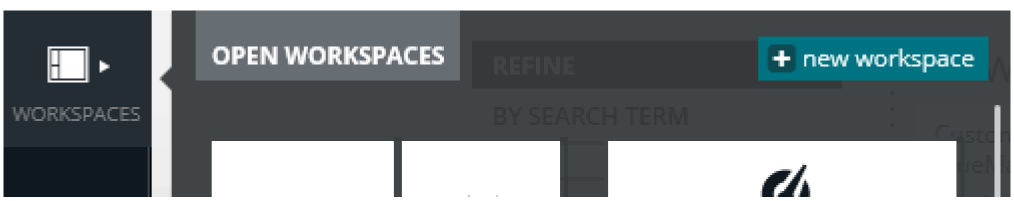
Workspaces can be created in any of these ways:

1. **Selecting a view from a search or notification** - When you click on the title of the view from a search or notification, Hubble adds the view to the workspace.



If the view you are selecting is already open in a workspace, you will be prompted to go to that existing workspace or create a new one.

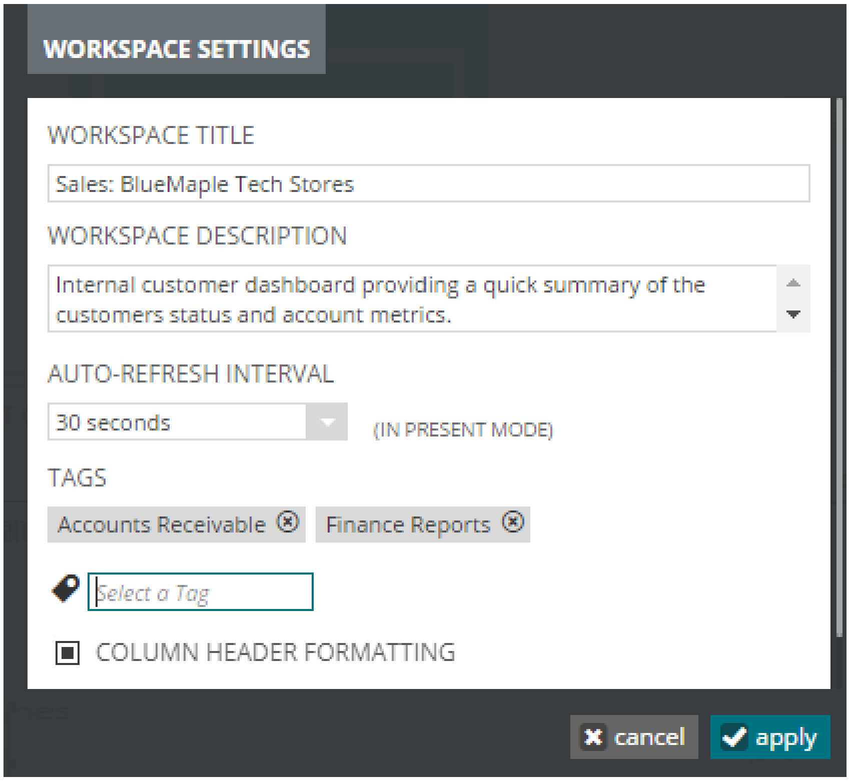
2. **Workspace menu** - When you click on the **Workspaces** icon, you can then click **New Workspace** to create a blank workspace.



Once you have created a workspace, you can:

- Add views. See **Add Views to a Workspace**.

- Create a workspace name (do this by going to **Manage** > **Settings** > **Workspace Settings**):



- Add a workspace description
- Add searchable tags to the workspace
- Enable or disable column header formatting. If enabled, reports in the workspace will use the column header formats specified in Hubble Designer. If disabled, they will use the Hubble Web default format.

This option is disabled by default for workspaces created prior to version 18.2 and enabled for workspaces created from 18.2 onwards.

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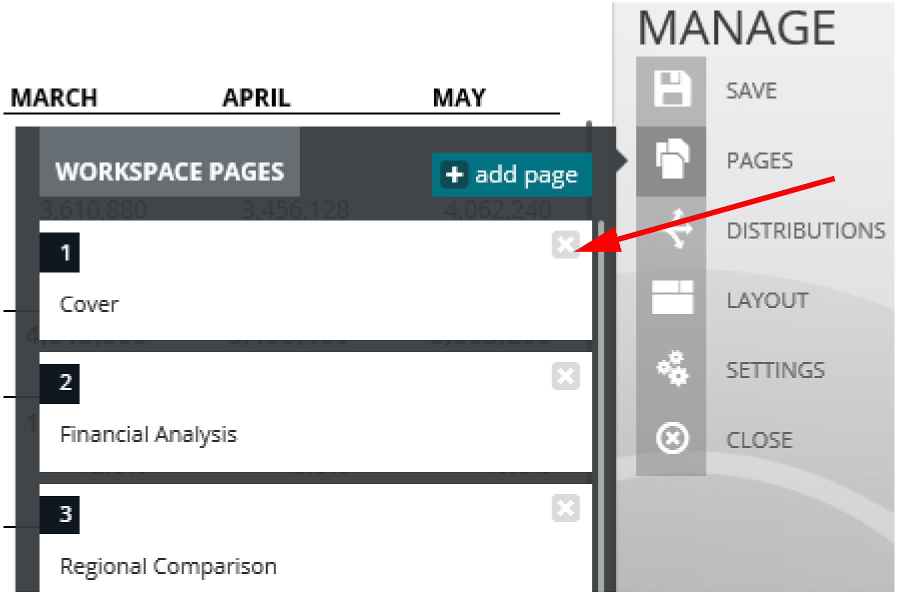
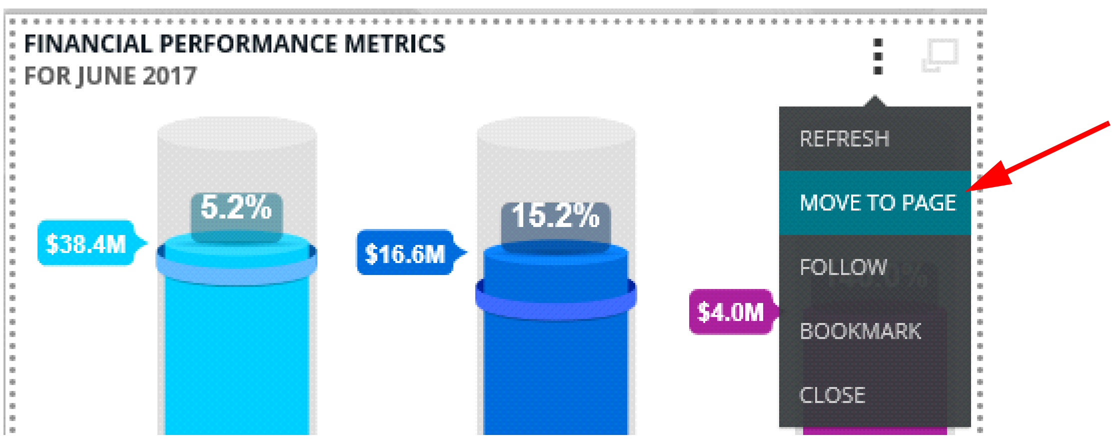
- Add pages, either through the Pages menu or by moving a view to a new page.



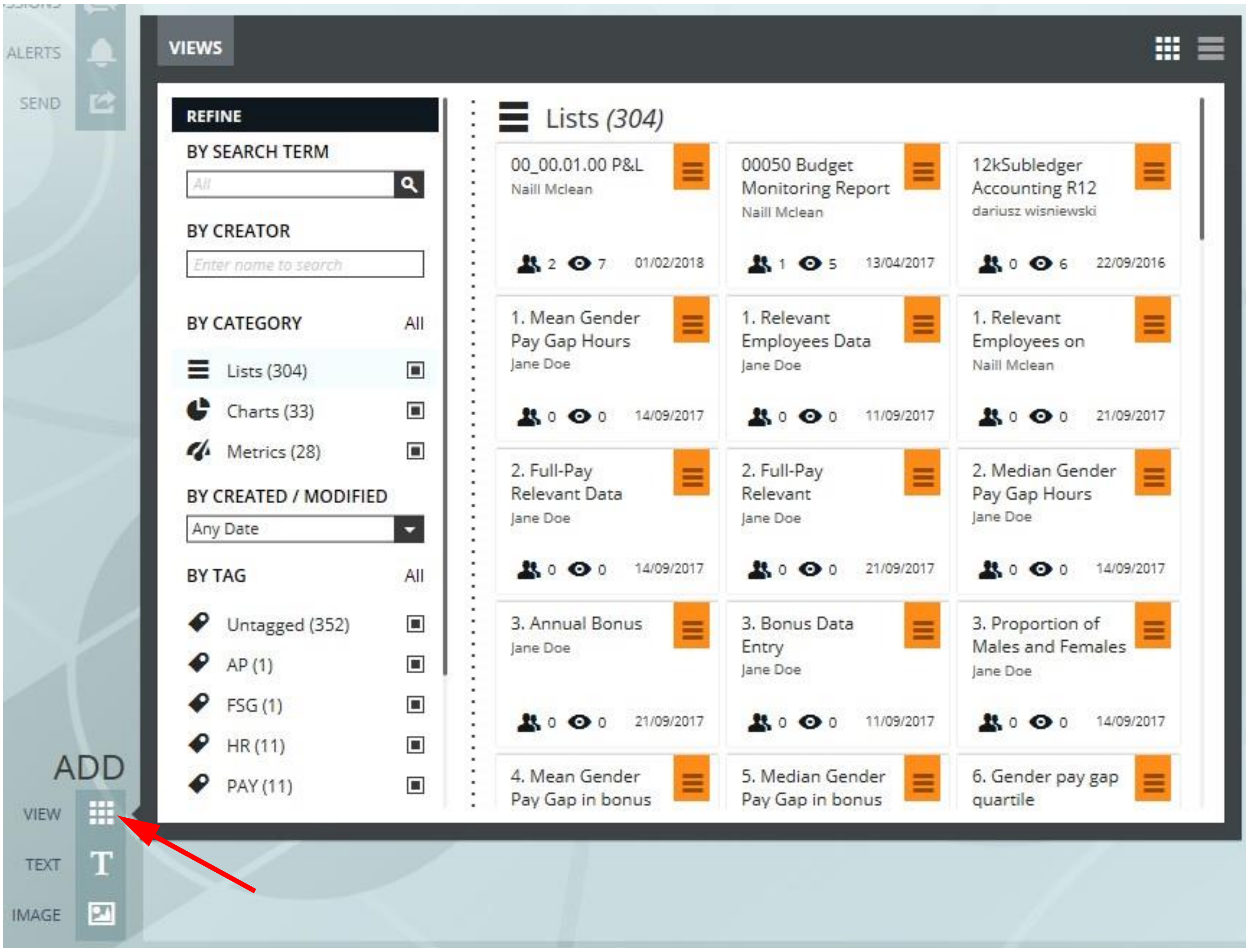


- Save the workspace.

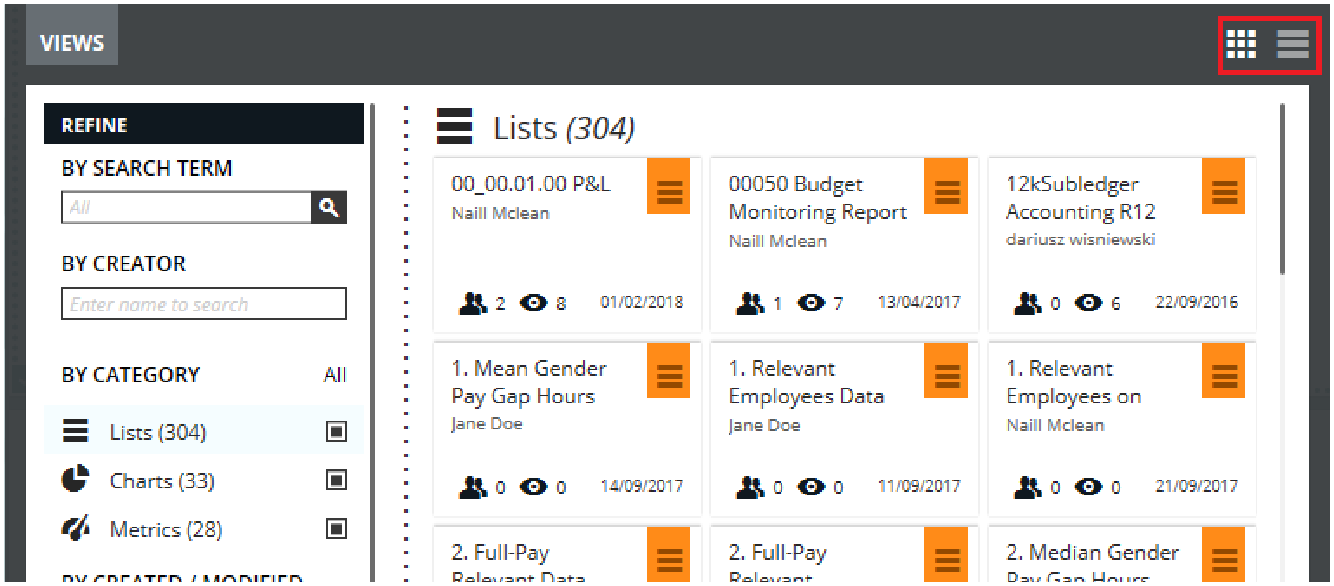
Add Views to a Workspace

You can add a view to a workspace in either of these ways:

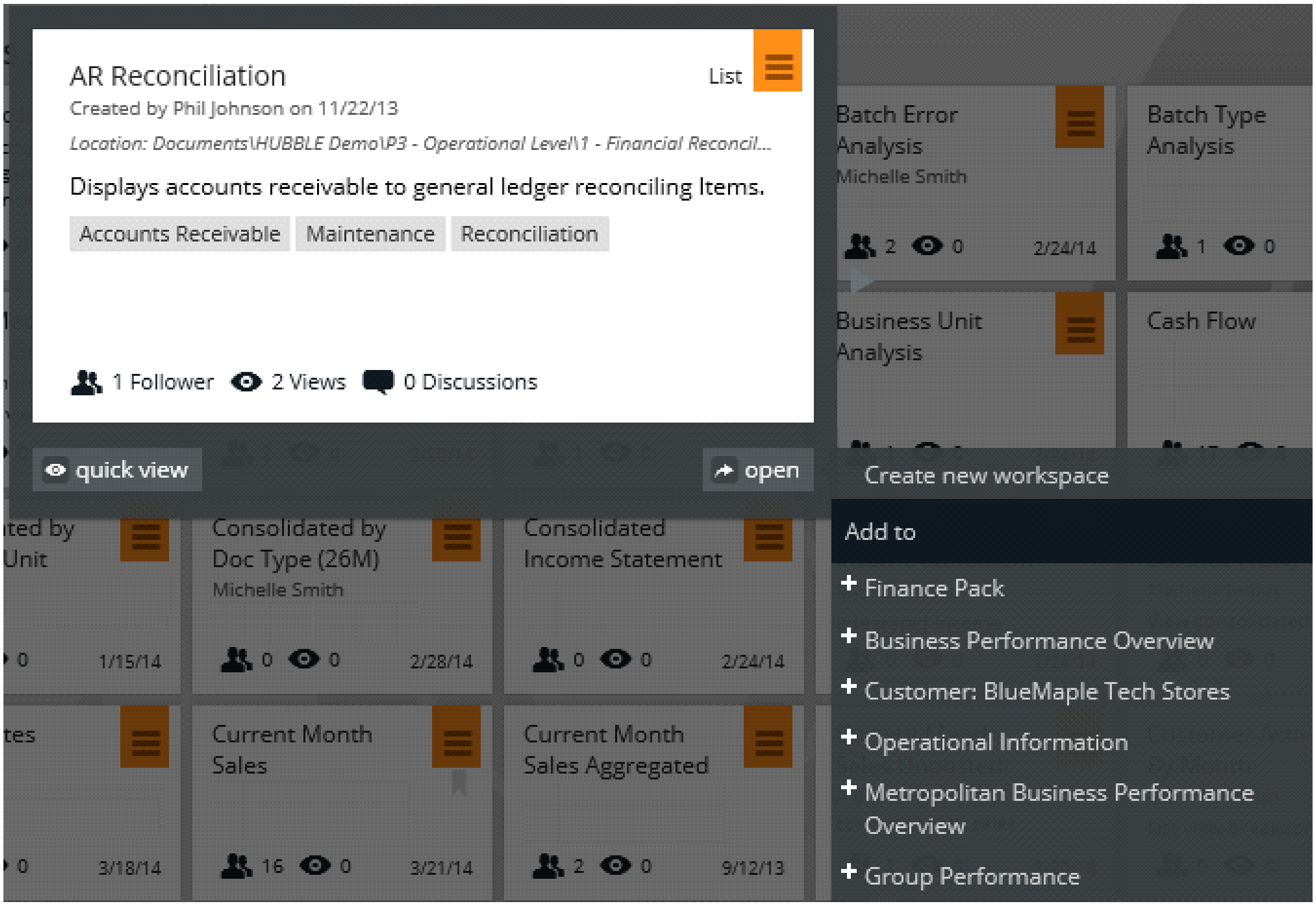
1. **Inside a workspace** - Using the **Add** option on the workspace will add a mini search to select the view.



Note that you can switch between having views listed in tile format (as above), or listed vertically. To switch between display formats, use the buttons highlighted in the image below:

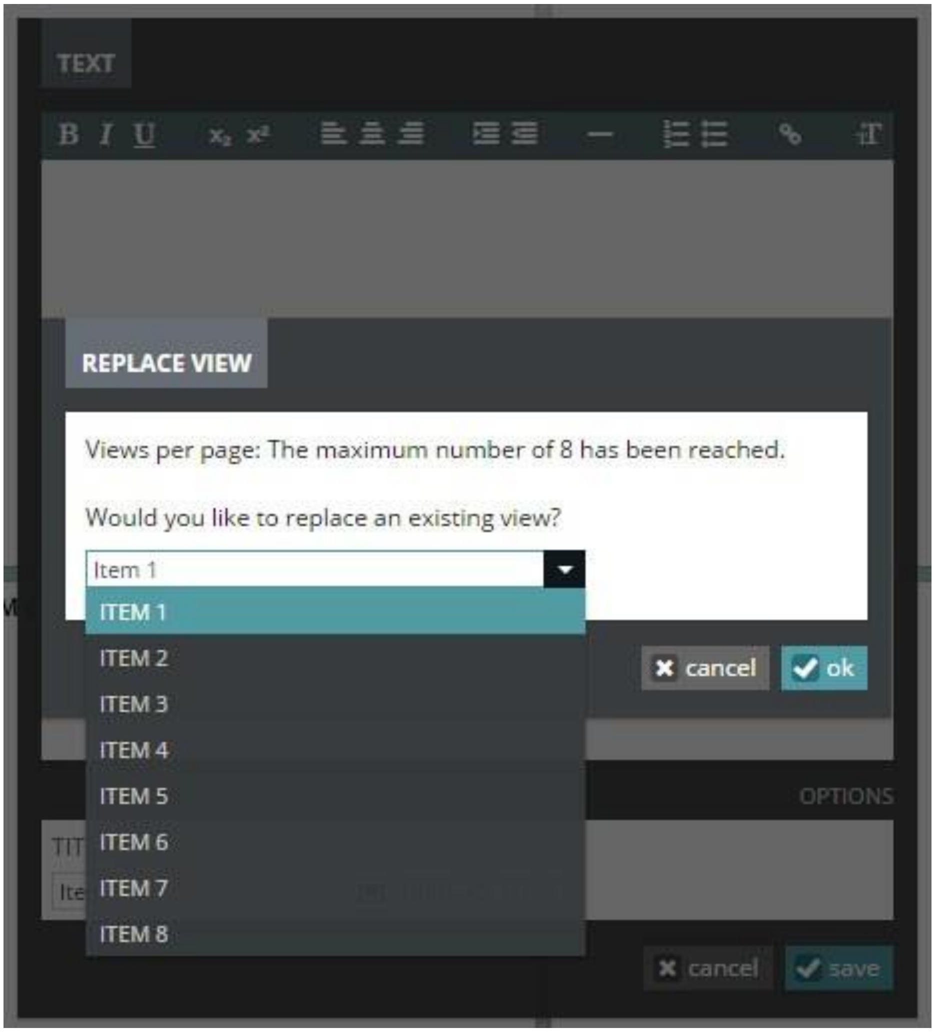


2. **Search** - Opening the large card for a view provides an option add an item to a specific workspace by clicking **Open**.



3. You can add multiple items up to a default maximum of 8:

   a. When using the **Add** option, if you add an item to a Workspace that already has the maximum number of items on it, you will be informed of this and asked if you want to replace one of these existing items. A list of the existing items will be available to select from. For example:



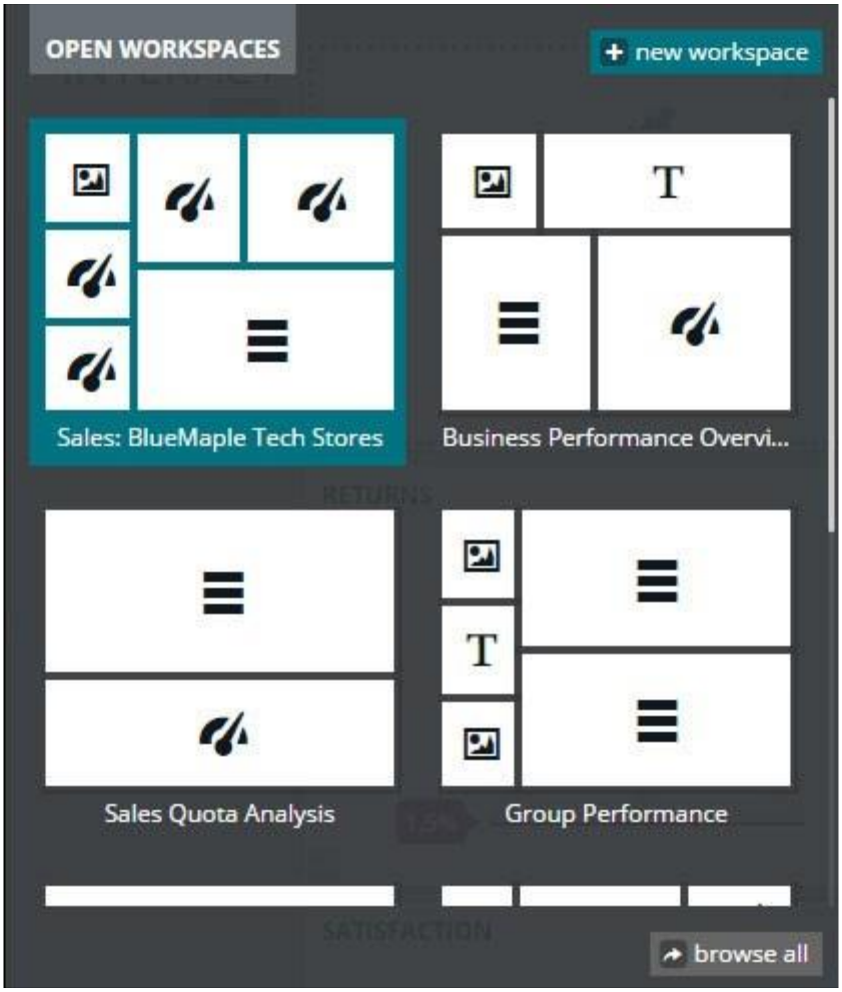
   b. When you select a new view to add from the search screen to add to a Workspace, if the last page has the maximum number of items on it, the view will be automatically added to a new page.

Finding Workspaces

Open Workspaces

You can quickly see all open workspaces in either of these ways and select one from there:

1. **Workspace** Icon - Open workspaces are displayed here:



2. From within The Hub, flip over the Open Workspaces Card:

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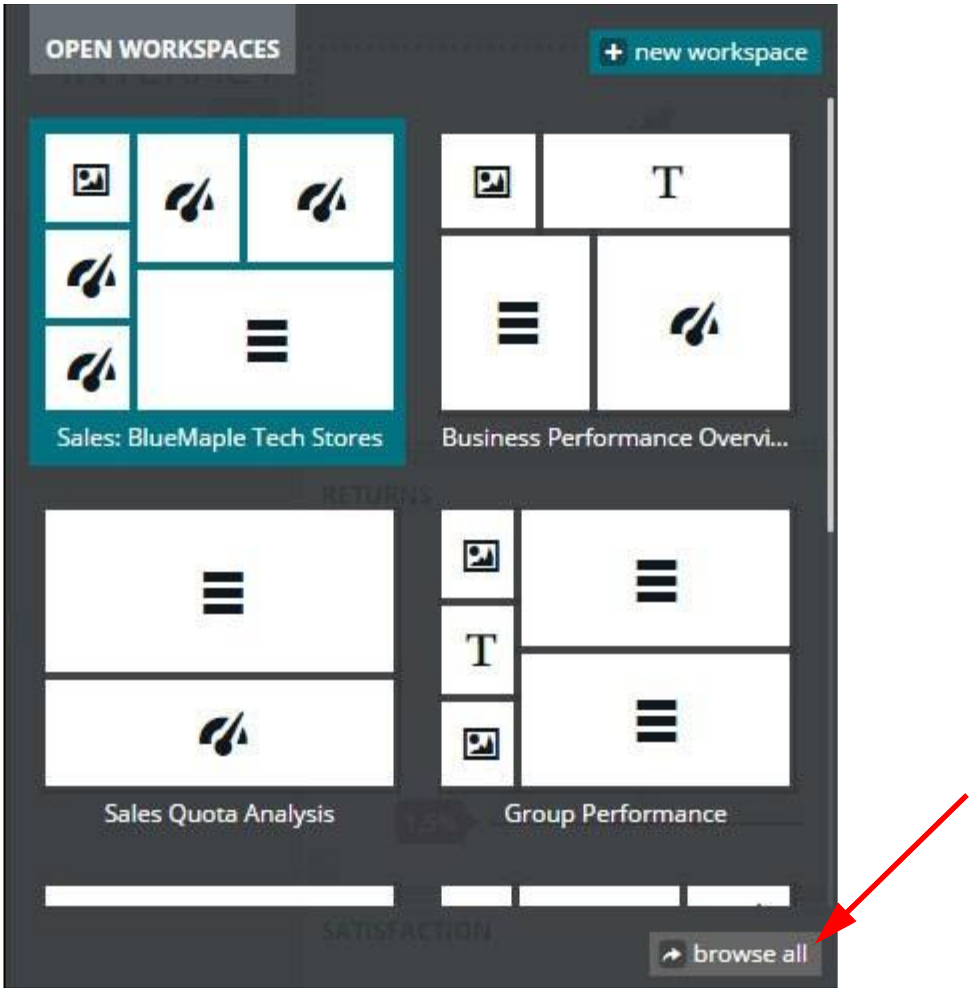
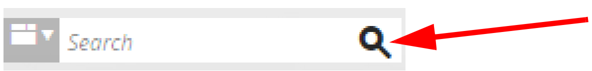
All Workspaces

View all workspaces from either of these places:

1. **Workspace** Icon - Click the **Browse All** button on the bottom right:



2. From the Search Bar, select Workspaces from the drop-down and select **Search**:



Workspace Output and Sharing

You can output a workspace by saving it as a PDF or sharing it with other Hubble users or user groups. Additionally, list views can be downloaded to Microsoft Excel.

You do not need to save a workspace before creating a PDF from it. Any unsaved changes will be included in the PDF.

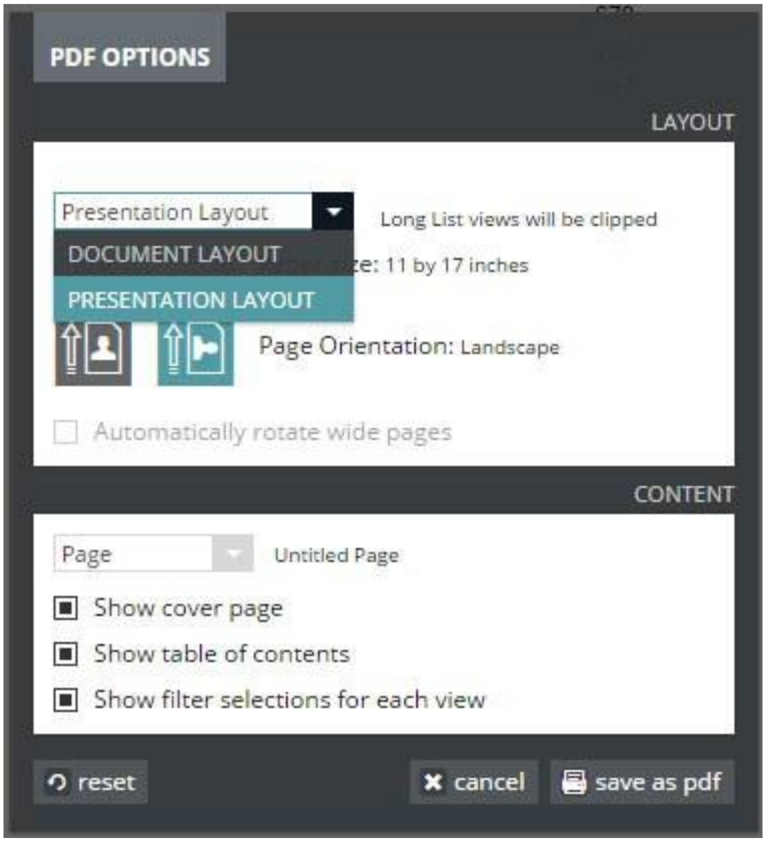
Save PDF

The maximum number of cells that can be included in a PDF is 500,000.

PDF generation that takes longer than 10 minutes will timeout.

1. From the **Interact** Menu, click **Send** > **Save PDF**.

2. Choose the Layout Options



   a. Document or Presentation layout.

      Presentation layout is designed to make generated PDFs look and feel more like the Hubble dashboard. If selected, other layout options should be set as described below. Any list views or text views that need to be scrolled to view fully in Hubble will be truncated in PDF documents with this layout.

   b. Paper size (set to Tabloid if Presentation layout is selected).
   c. Orientation (set to Landscape if Presentation layout is selected).
   d. Automatically rotate pages.

3. Choose the Content Options for the Workspace/Page/View.
   a. Cover page.
   b. Table of contents.
   c. Filter selections for each view.

4. Click **Save as PDF** once all the options have been set.

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Sharing a Workspace with Another User

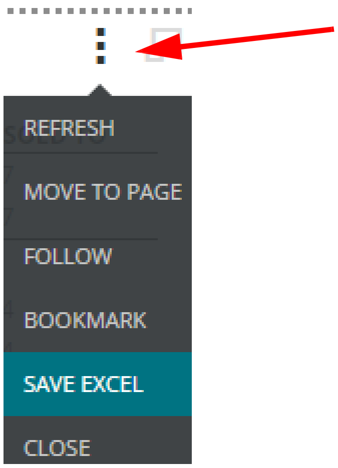
Workspaces, or copies of Workspaces can be shared to selected users or groups of users.

For details, please refer to **Sharing Workspaces**.

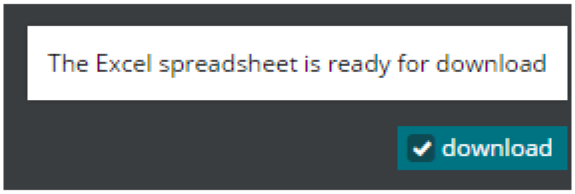
Downloading to Microsoft Excel

To download a list view to Microsoft Excel, follow the below steps.

1. Select the view.
2. Click on the **View Options** in the upper right corner.



3. Click **Save Excel**, and once ready, click **Download**.



4. Once it has downloaded, you can open it in Excel.

You can only download one list view at a time.

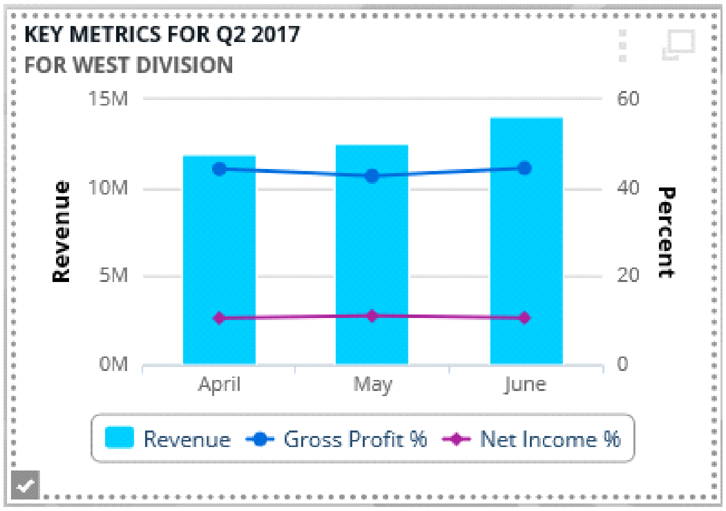
Views

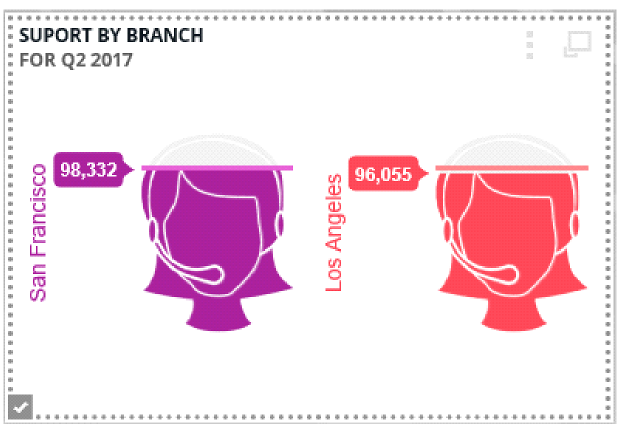
View Overview

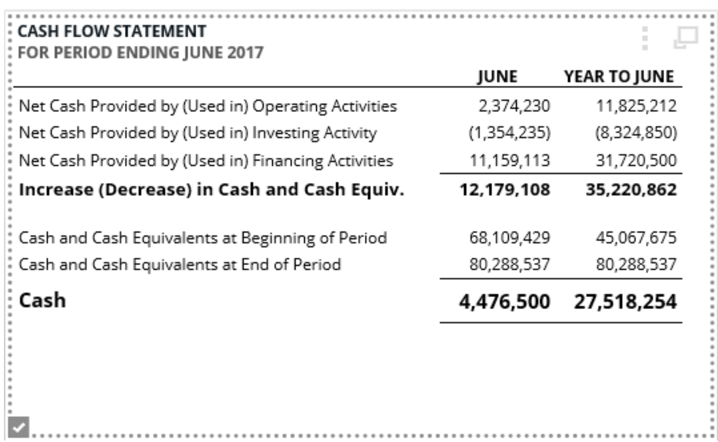
Information can be displayed in Hubble in many different ways, from tabular information (typically a report) to images to text to metrics to charts. Views make up a workspace, which is a multi-page dashboard. A key advantage of Hubble is the ability to create your own workspace with whatever views are applicable to you!

Hubble Designer and Power Users create the views and grant permissions to Viewer users to access these views. Viewer users can then create their own workspace with the views for which they have permissions.

Below are examples of different types of views:





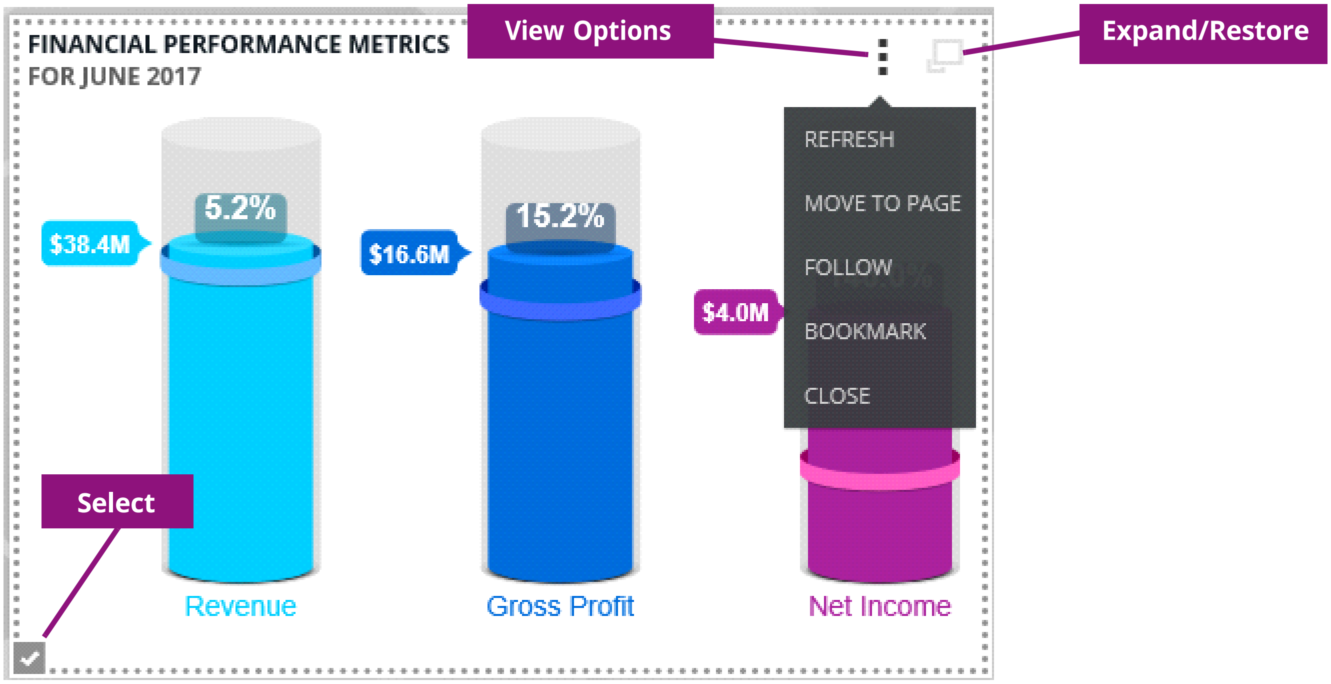


CASH FLOW STATEMENT
FOR PERIOD ENDING JUNE 2017

	JUNE	YEAR TO JUNE
Net Cash Provided by (Used in) Operating Activities	2,374,230	11,825,212
Net Cash Provided by (Used in) Investing Activity	(1,354,235)	(8,324,850)
Net Cash Provided by (Used in) Financing Activities	11,159,113	31,720,500
Increase (Decrease) in Cash and Cash Equiv.	**12,179,108**	**35,220,862**
Cash and Cash Equivalents at Beginning of Period	68,109,429	45,067,675
Cash and Cash Equivalents at End of Period	80,288,537	80,288,537
Cash	**4,476,500**	**27,518,254**

View Tour

You can select a specific view in the bottom left corner. You can expand/restore the size of a view in the upper right corner. View Options are to the left of the Expand/Restore option.



View Options

There are various view options, and they vary depending on the type of view. The options include:

- Refresh this specific view
- Add or move the view to another page
- Follow view to be notified of discussions on this view
- Bookmark for quick access
- Edit (image and text views)
- Show Title (image and text views)
- Save Excel (list views)
- Close to remove this specific view from the workspace
- Expand/Restore
- Makes a view full screen
- Select - Allows for specific selection of one or more views. You can do different things with a view, such as set the filters, once it is selected.
- Allows for specific selection of one or more views

You can also choose to **expand/restore** to a view/exit a full screen view.

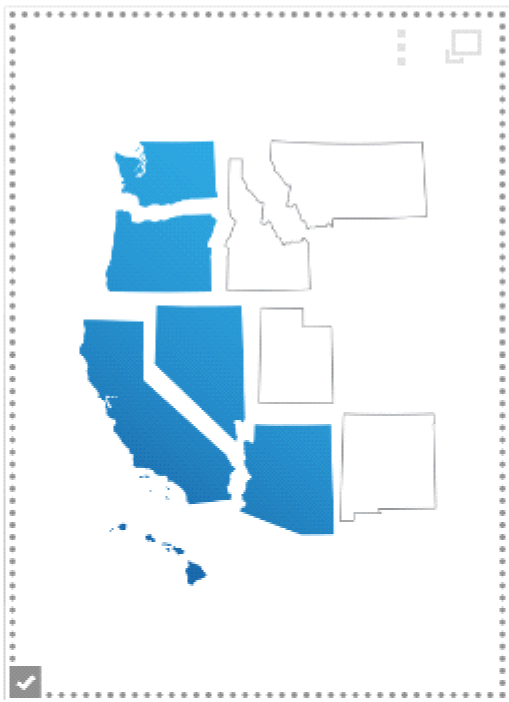
View Types

There are several types of views in Hubble:

- Image view
- Text view
- List View
- Visualizations
  - Metric View
  - Chart View

Image Views

Images can be used for items such as logos, product images or regional images. They can help users connect data to its purpose.

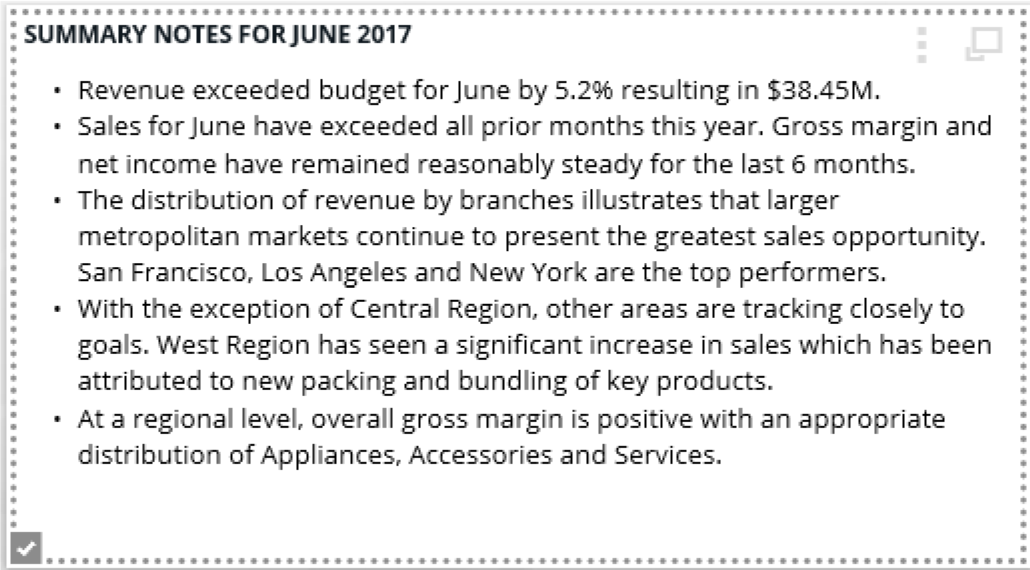


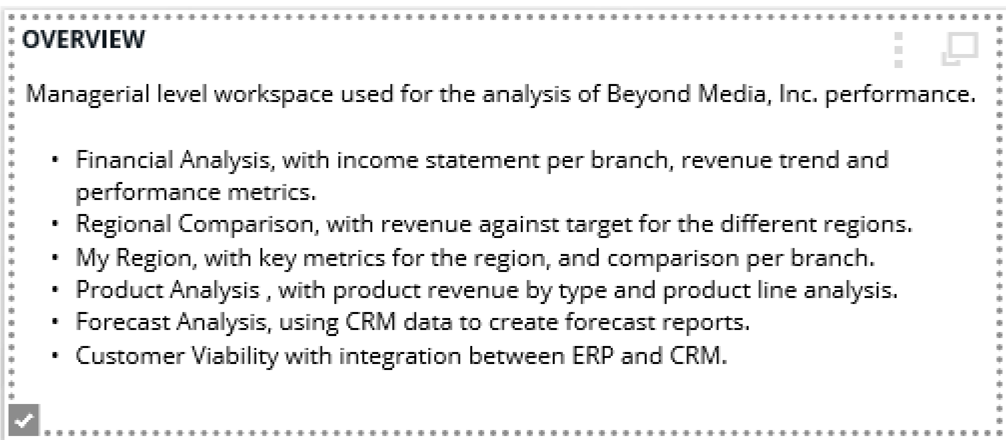
Images are loaded from a local drive or web link and stored as part of the workspace. They are automatically sized up to their maximum dimensions. They can be in PNG, JPEG or SVG format. Optionally, image views can have a title, which can be shown/hidden.

Image view titles appear in the table of contents. Give it a title even if you don't show it!

Text View

Text views are used for items such as explanations, instructions, supporting notes or tips.





Text views are entered by the user and are stored as part of the workspace. They can be formatted using WYSIWYG options. They can include hyperlinks.

Optionally, text views can have a title, which can be shown/hidden.

Text view titles appear in the table of contents, so be sure to give a text view a title even if you don't show it!

List Views

CASH FLOW STATEMENT
FOR PERIOD ENDING JUNE 2017

	JUNE	YEAR TO JUNE
Net Cash Provided by (Used in) Operating Activities	2,374,230	11,825,212
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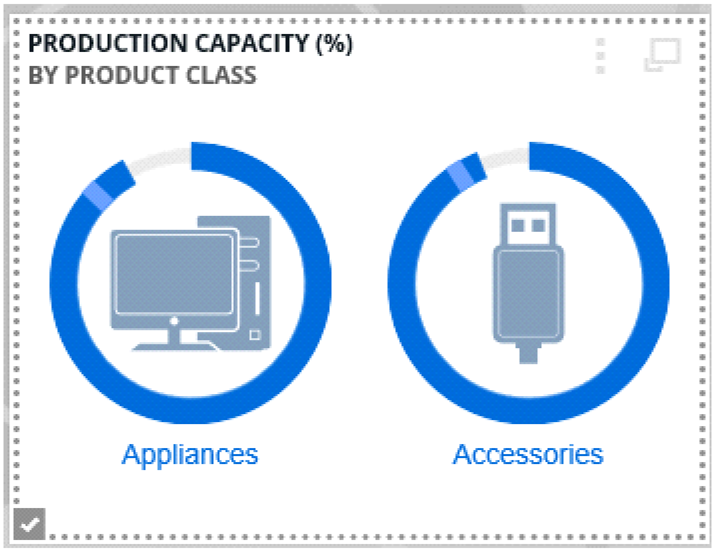
Cash and Cash Equivalents at Beginning of Period	68,109,429	45,067,675
Cash and Cash Equivalents at End of Period	80,288,537	80,288,537
Cash	**4,476,500**	**27,518,254**

List views are tabular information, typically reports and financial statements. They are created by Designers or Power users. They can have links to other views and can be exported to Microsoft Excel.

Try to avoid scrolling by sizing the panel.

Metric Views

Metric views are used to show a single value or comparison between 2 related values in a visual way, for example comparing actual to budget amounts. Metric views are used for things such as pinpointed amounts, KPIs, and infometrics. Here are a couple examples of a metric view:



Metric views are created by Designer or Power users and are based on a list view. They always link to their source list view. There are many different styles that can be used to create them. Automatic colors make sure your workspace has variety (unless the Designer forced a color override).

Metrics and KPIs are a great tool for driving/acknowledging success!

Chart Views

Chart views are used to visually compare multiple values against each other. They can be used to compare sets of data or show trends, such as in the below example:

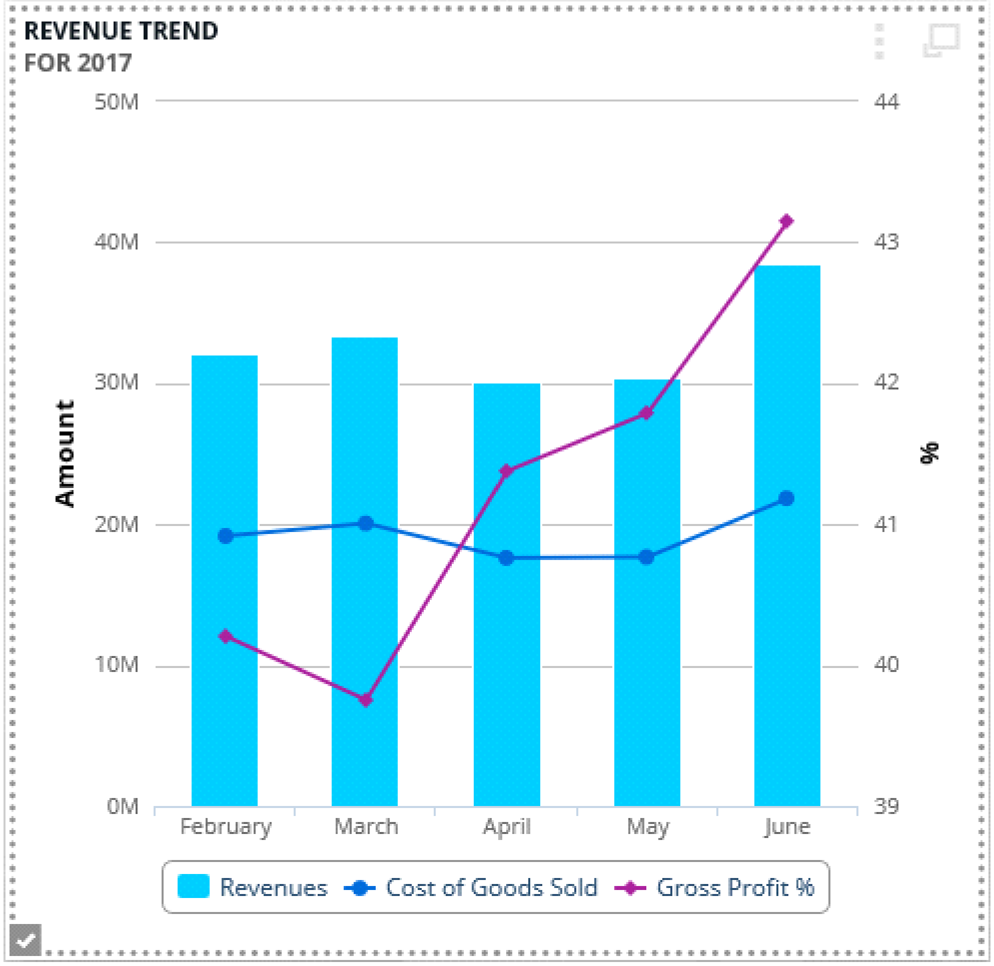
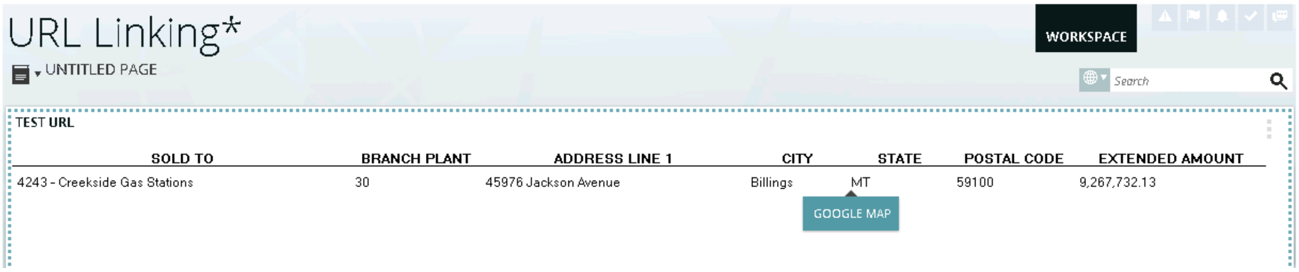


Chart views are created by Designer or Power users and are based on a list view. They always link to their source list view. Many different styles can be used when creating them.

The legend can be used to turn on/off data elements.

Linking to External Documents and Webpages

The linking functionality enables you to link to an external document or webpage from within Hubble. The Power user who designs the view creates the hyperlink to the external source object or webpage. Then as an Viewer user, you can execute that link when you have added the view to your workspace.



For details of this feature, please refer to the "Linking to External Document or Webpage" topic in the User Guide for Designer and Power Users.

Chapter 4: Notifications and Alerts

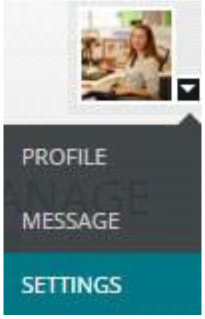
Notifications

One key component of Hubble is the ability to quickly monitor what is happening in your business. Information is pushed to you so you do not have to constantly search for the information you need. Hubble is all about helping users see what they need to see! Users set how frequently they are sent notifications and for which items they are notified.

Notifications are messages about system events or other Hubble information, for example situations like a shared workspace or an approval that is ready for your review.

Notification Preferences

To set your preferences for all notifications including Alerts, go to **Settings** from the drop-down menu under your profile picture:



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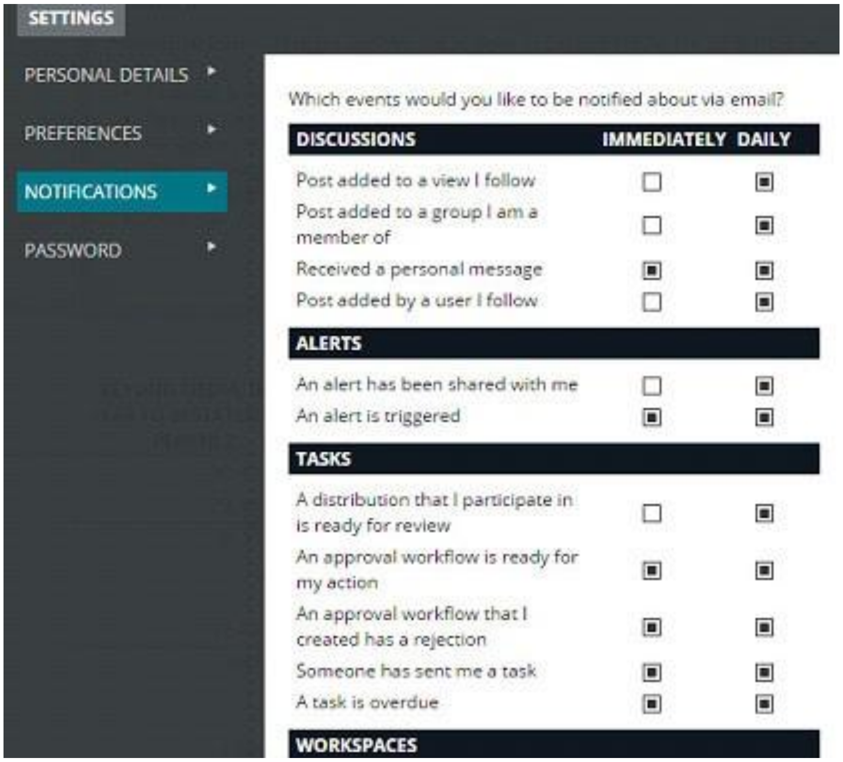
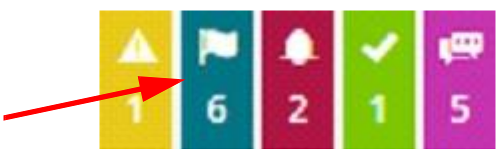
The settings in Notifications dictate *if* you get an email notification for Discussions/Tasks/Alerts/Workspaces and *when* you get that email.



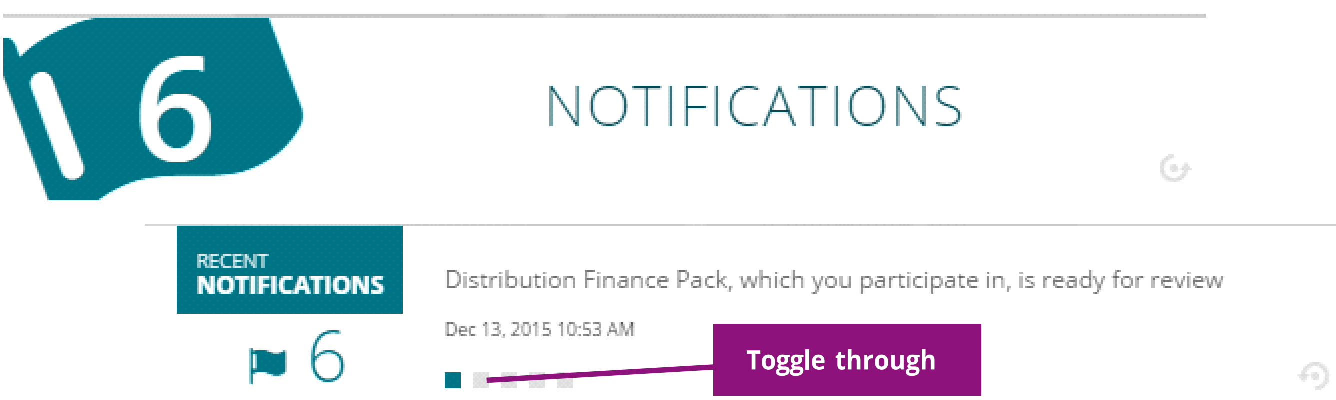
New Notifications

There are 2 ways to see your see your new (unread) notifications from the Hub:

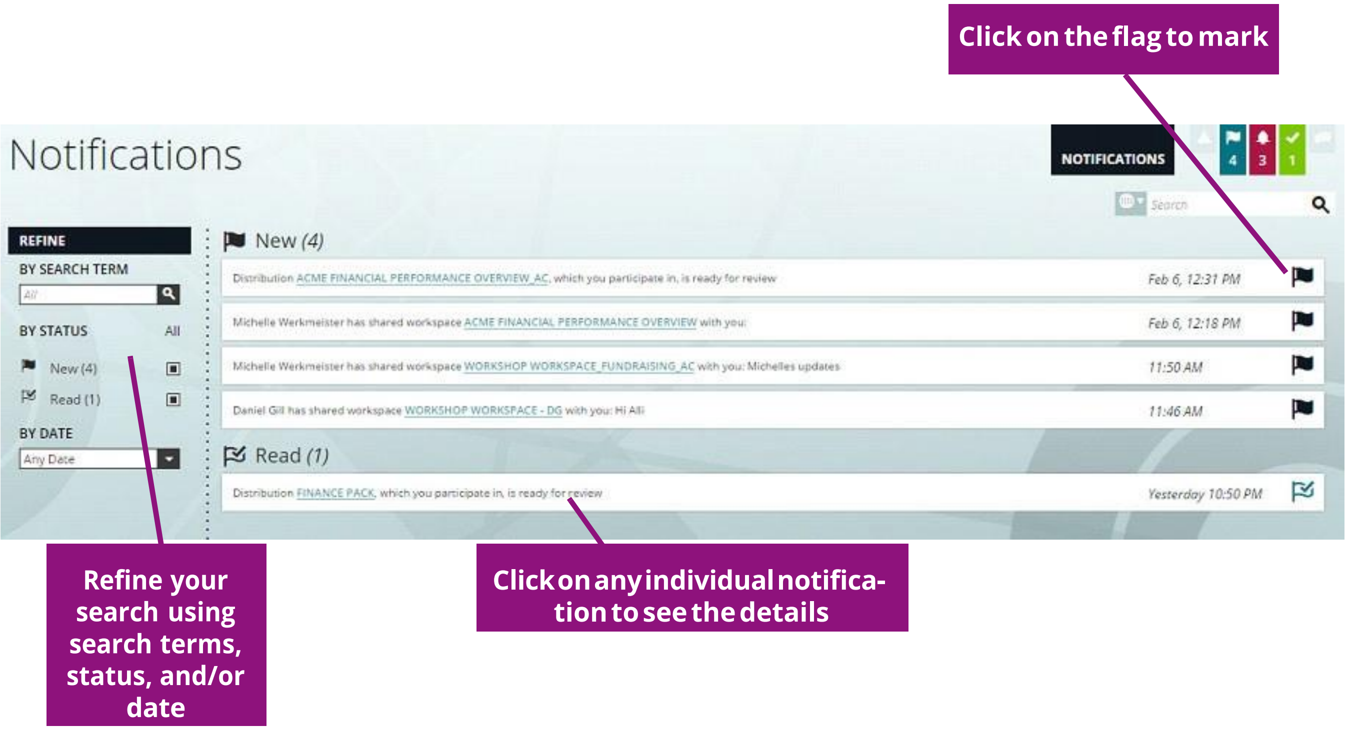
1. Through the Notifications Badge



2. Through the Notifications Card.



When you click on a specific Notification, it opens up the Notifications page where you can see all your Hubble Notifications.



Tip: You cannot create subfolders to organize notifications, so refine your search to narrow down the results.

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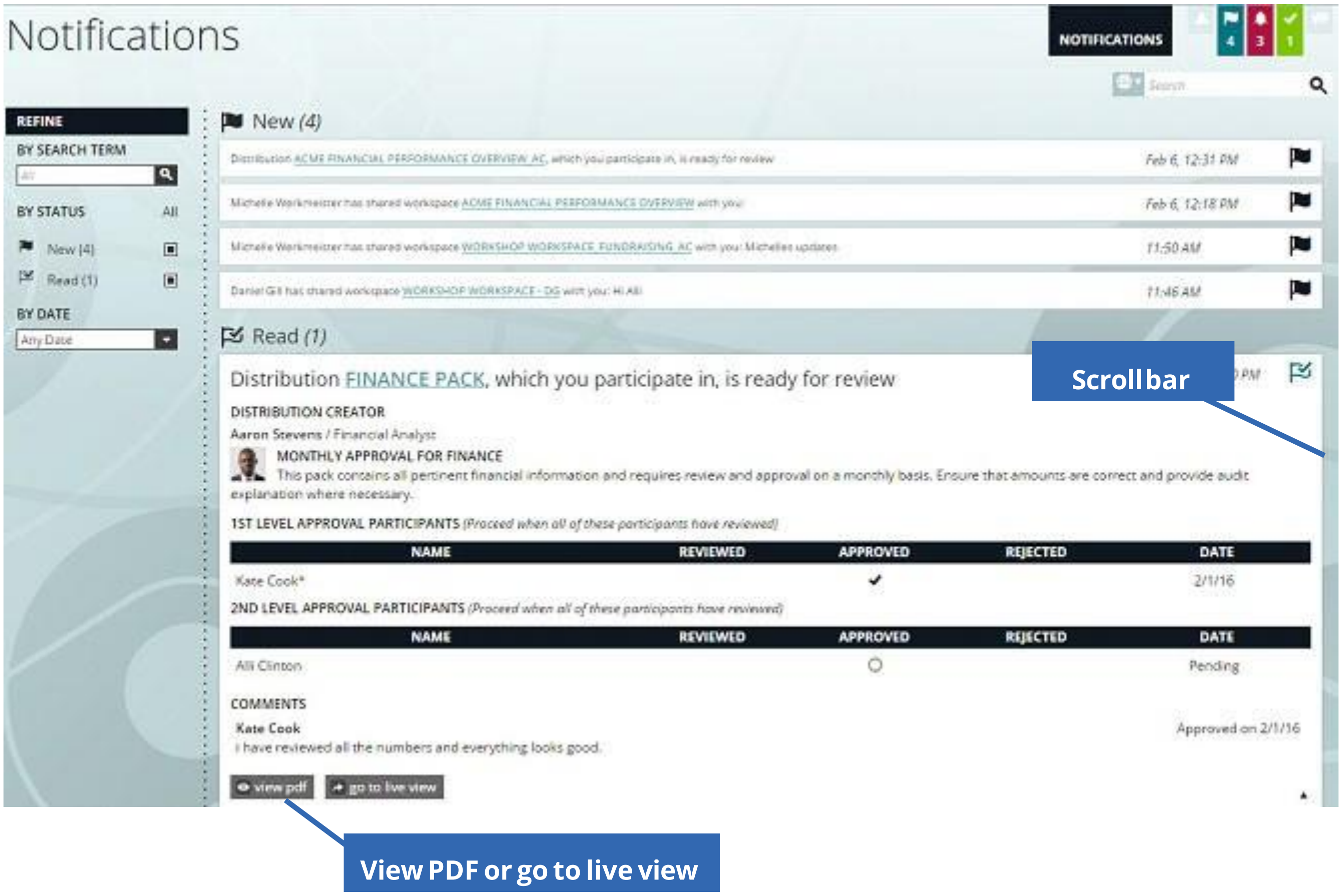
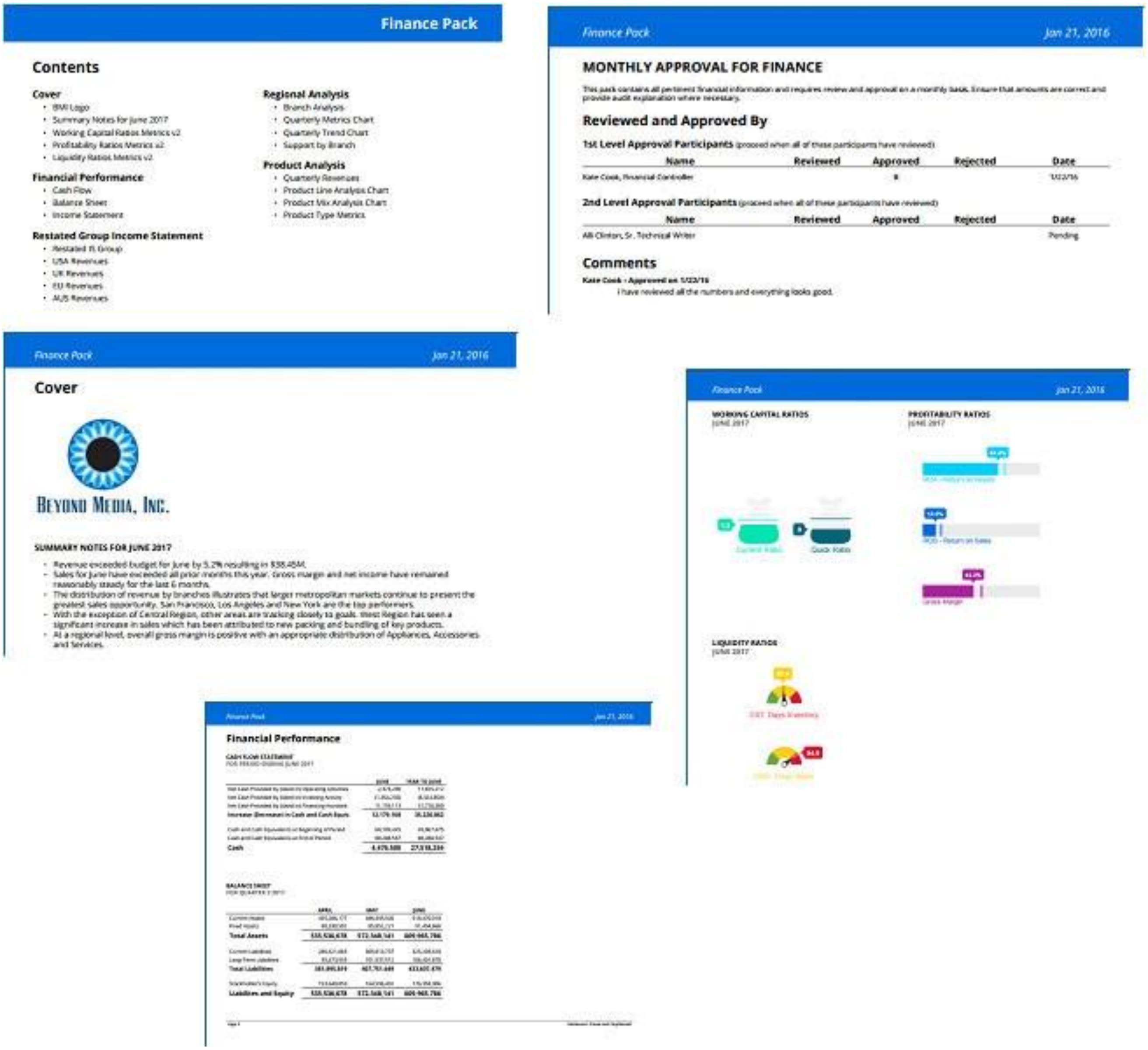
Notification Details

Once you have clicked on a specific notification to expand it, you see all the details including approval participants and the status of each approval level. You can also view the PDF from here and go to the live view.



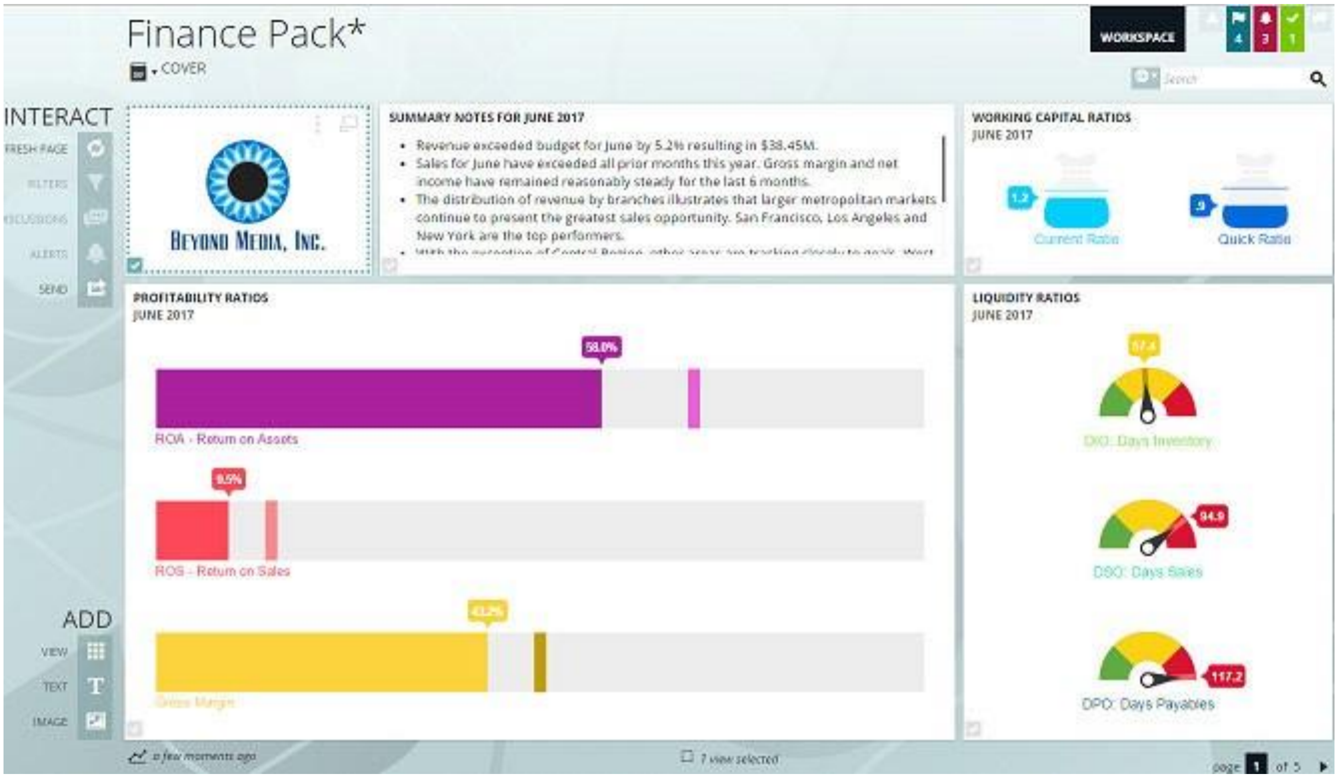
View PDF

Following the Finance Pack example, when you click **View PDF** from the notification itself, the PDF downloads and you can open it up to see all details in PDF form, such as in this example:



Live View

When you click on **Live View** from the notification itself, it opens up the workspace so you can see the data.



Alerts

In Hubble, you can be alerted when specific situations occur. Hubble watches for these to happen so you don't have to! Alerts are data driven, and you can put an alert on a list view so you know when a defined condition occurs, for example:

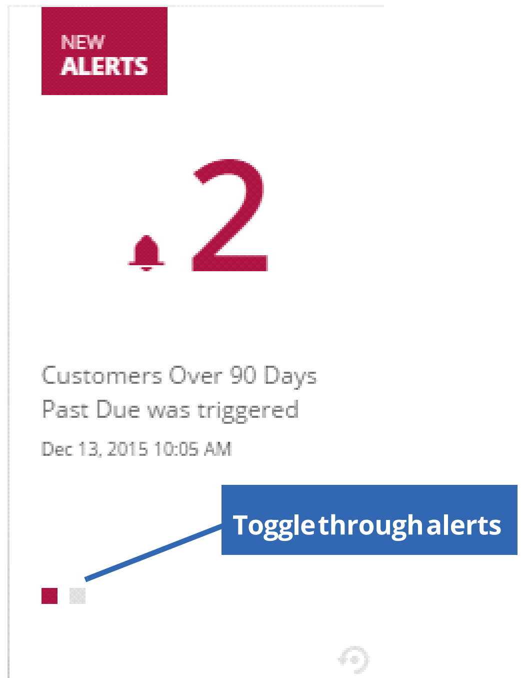
- Exceeding a budget
- Customer 90 days past due
- Out of balance condition
- KPIs that do not reach certain thresholds

The Hubble Accelerator is a prerequisite to using the Alerts feature. This needs to be configured by a System Administrator.

Alerts are tied to a list view regardless of what workspace the view is on. So when someone shares a workspace that has an alert, that alert is shared too. Alerts can be those that you created or those to which you have subscribed.

New Alerts

There are two ways to see your see your new (unread) alerts from the Hub, either through the Alerts Badge or through the Alerts Card.

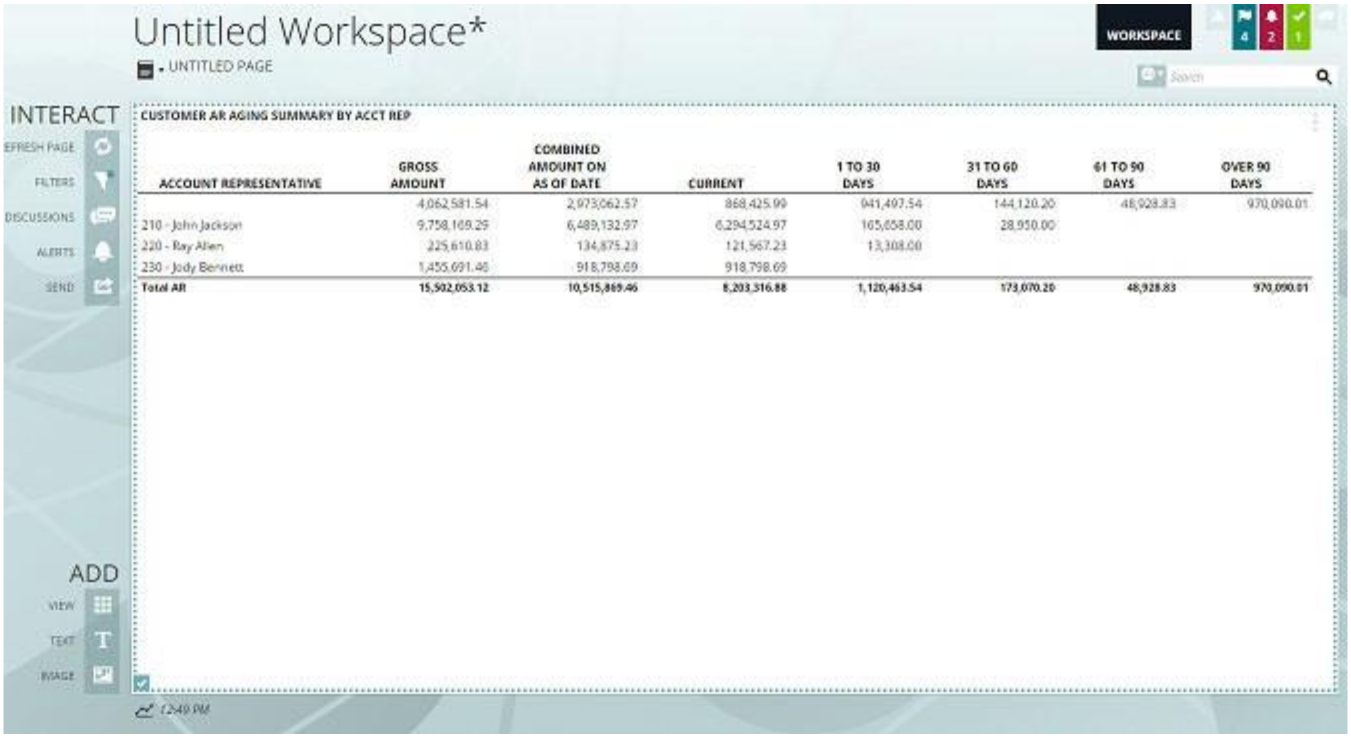


Alert Details

From either the badge or the card, click on a specific alert to see the data that triggered the alert. This opens the Alerts page.

Live View

When you click on **Live View** from the alert itself, it opens up the view in a new workspace so you can see the data.

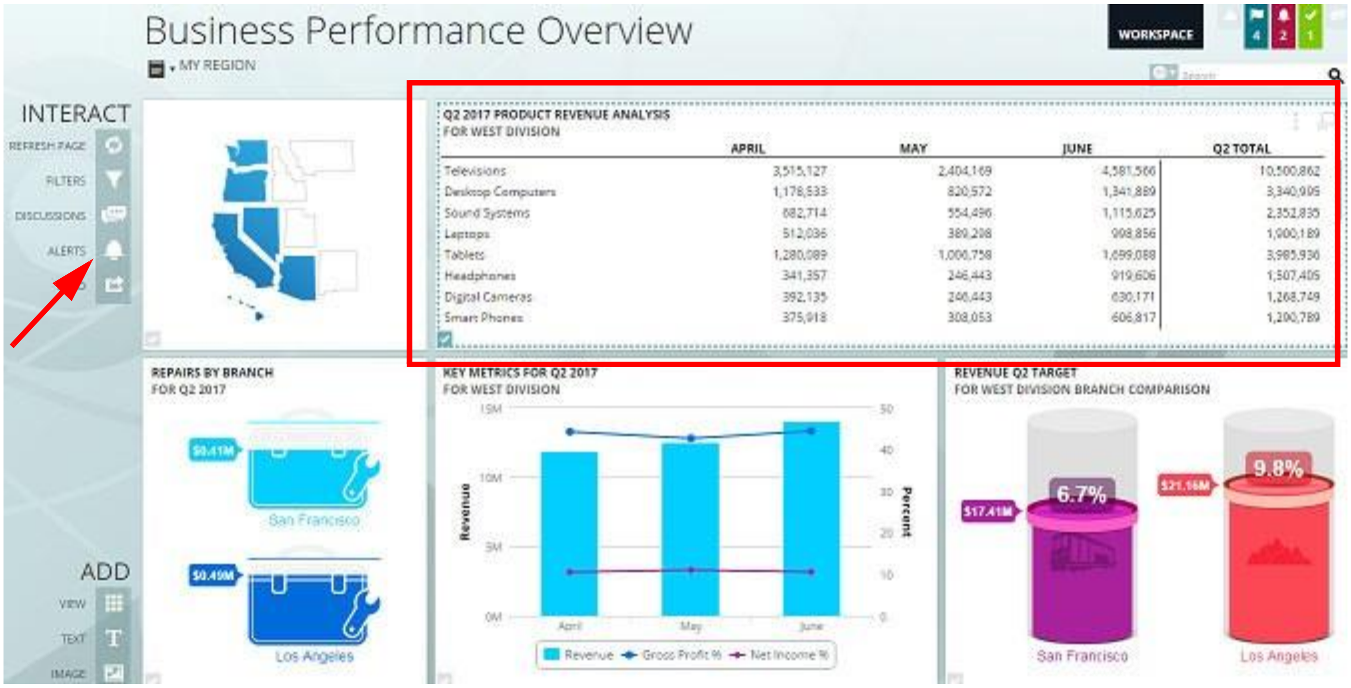


Creating a New Alert

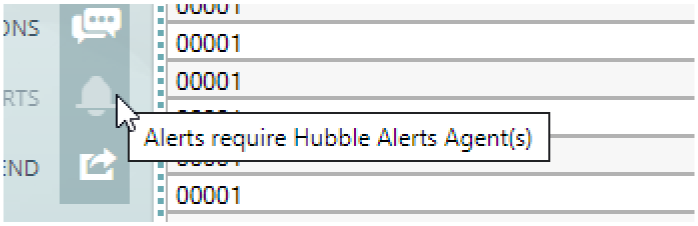
To set up a new alert based on a certain condition, follow the below steps.

1. Highlight the view for which you want to set up an alert.

2. Under **Interact** on the left side, click **Alerts**.

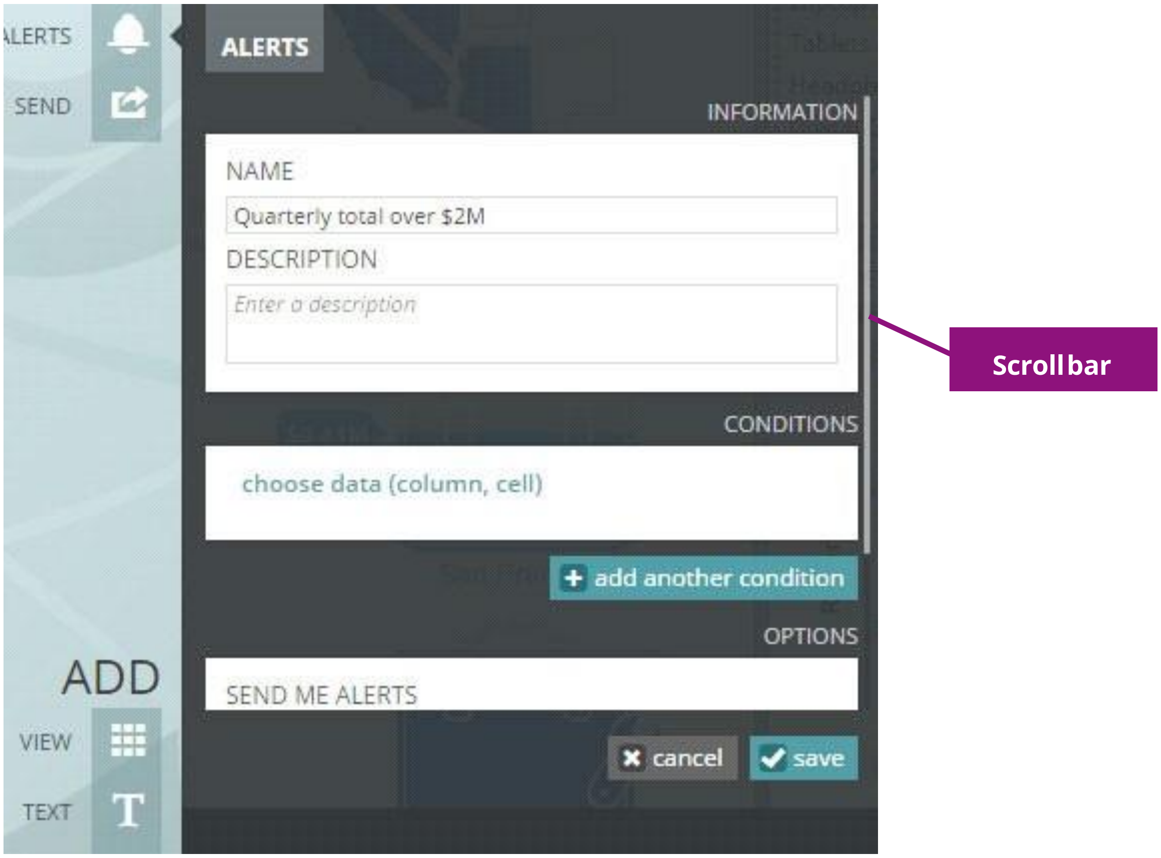


Note that if alerts are not configured in a system, then the icon will be grayed out and the following tooltip will be displayed:



3. You are prompted to create a new alert.

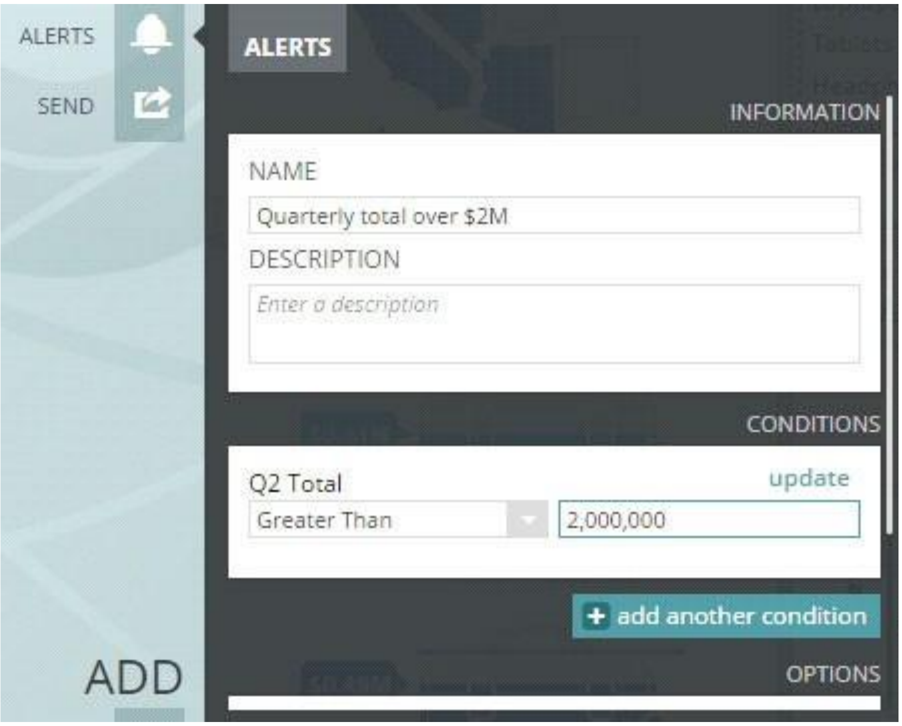
4. Enter in the requested information, conditions, and options. (Use the scroll bar to view all options.)



5. Under **Conditions**, when you click to choose the data, you are brought to the actual view to choose a cell or column of data. Click **Done** when finished.

	APRIL	MAY	JUNE	Q2 TOTAL
Televisions	3,515,127	2,404,169	4,581,566	10,500,862
Desktop Computers	1,178,533	820,572	1,341,889	3,340,995
Sound Systems	682,714	554,496	1,115,625	2,352,835
Laptops	512,036	389,298	998,856	1,900,189
Tablets	1,280,089	1,006,758	1,699,088	3,985,936

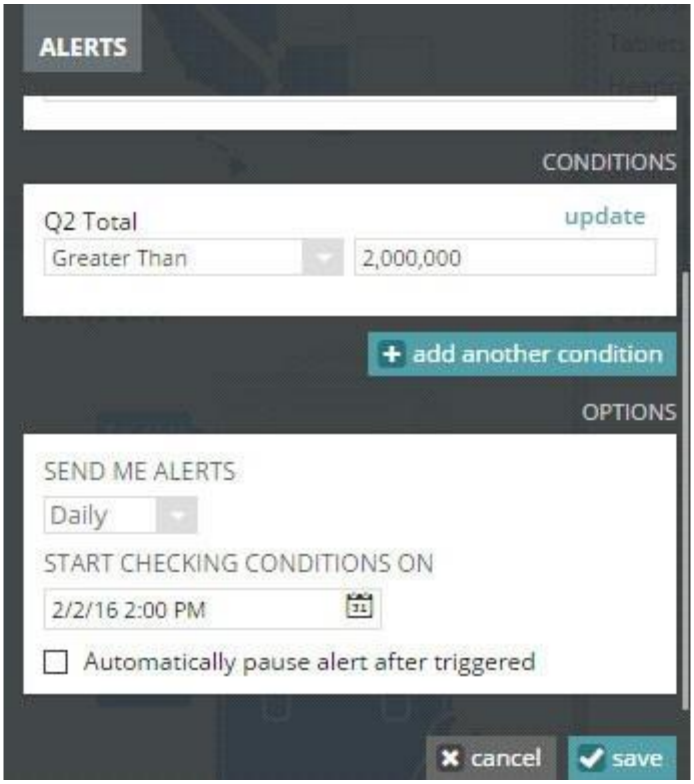
6. You are then brought back to your alert, where you finish entering in the condition. You can add in more conditions, if desired.



7. In the Options section, set up:
   a. Frequency that alerts will be sent at

> As of Release 20.1 the only available frequency when creating or editing an alert is "Daily". However, alerts set up in earlier releases with other frequencies (i.e. "Often" or "Hourly)" will not be affected and will still be sent at those frequencies.

   b. When to start checking the condition
   c. Whether to automatically pause after the alert is triggered (usually leave unchecked)



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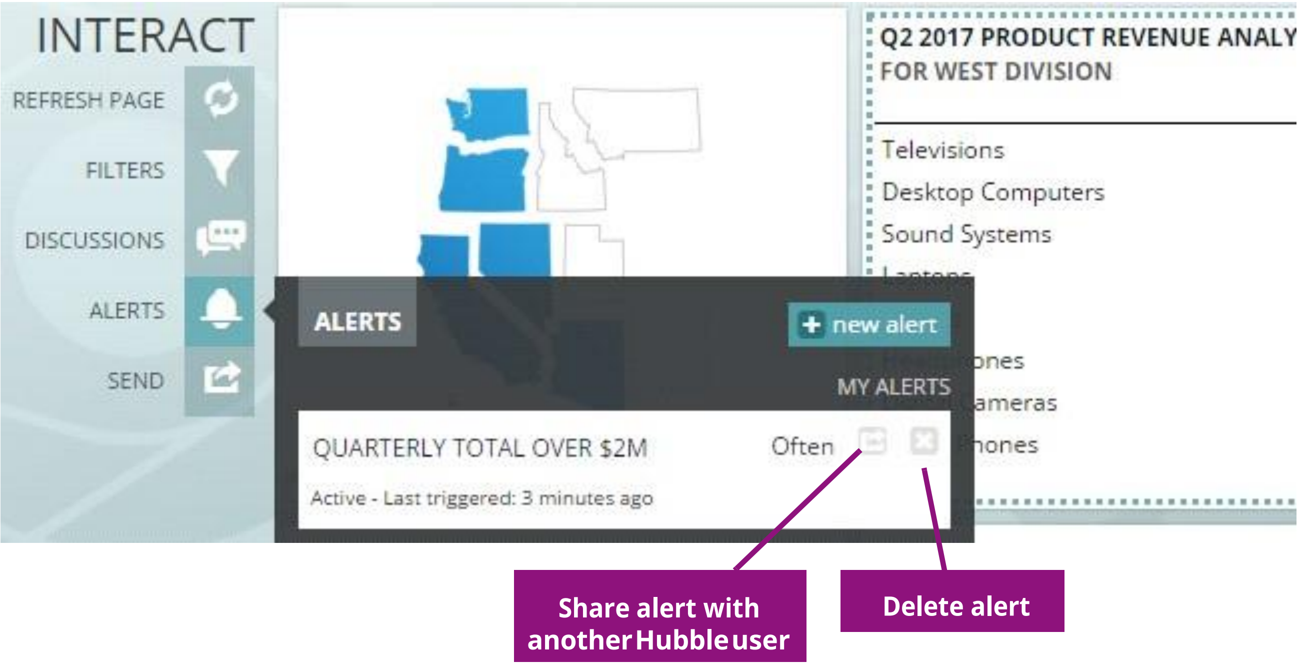
Managing Alerts

At any point you can go back to look at your alert after having selected the view for which it is set up. From the same place, you can also share the alert with other Hubble users and delete the alert.



If you edit an alert that is not yours and you save it, it creates a copy for you.

Once an alert is sent, Hubble does not keep sending the alert on the same condition.

If you mark the option to pause the alert after it is triggered, you must toggle it back on in order to re-activate.

Best Practices:

- While you can create alerts based on a cell or column, we recommend setting them up at the column level.
- Create a separate view within a workspace that is used specifically to set up the alerts, and from there you can link to the primary report.

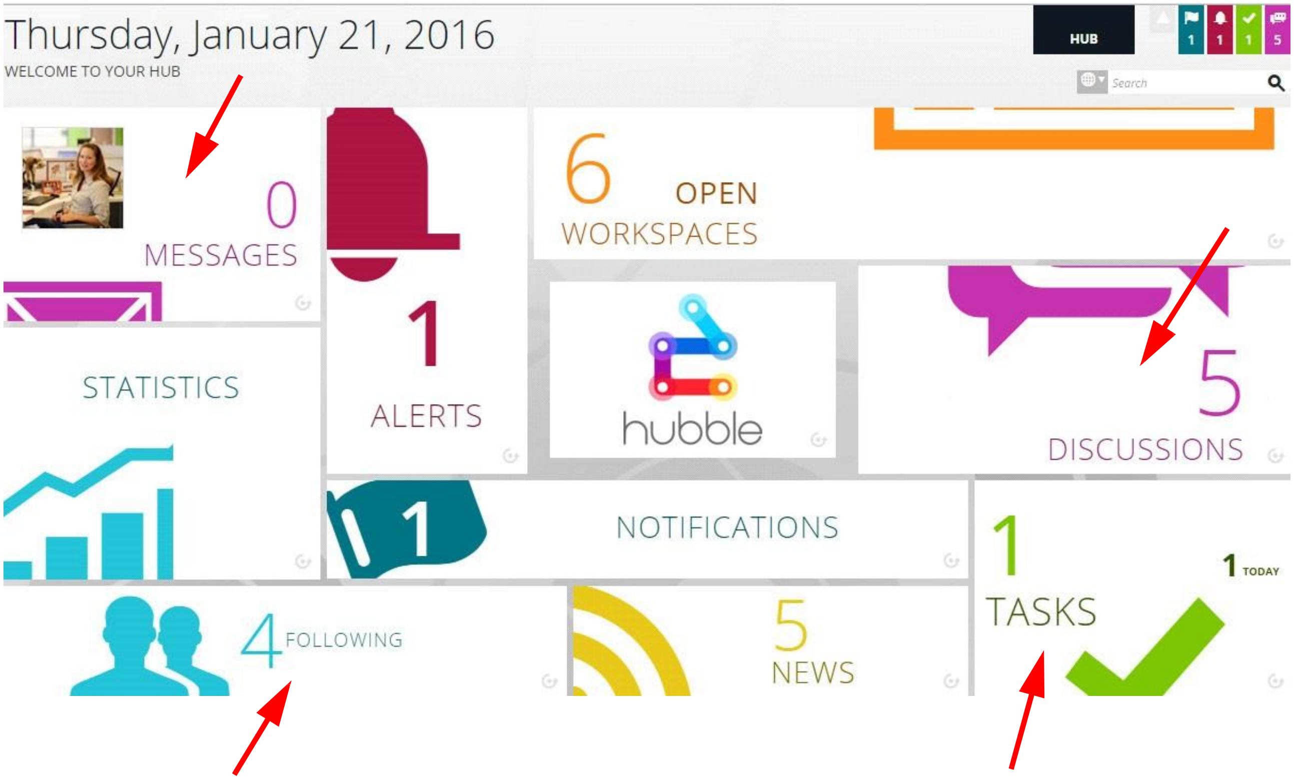
Chapter 5: Collaboration

Introduction

One of Hubble's key concepts and advantages is the ability to connect people to each other and to connect them to information and processes.

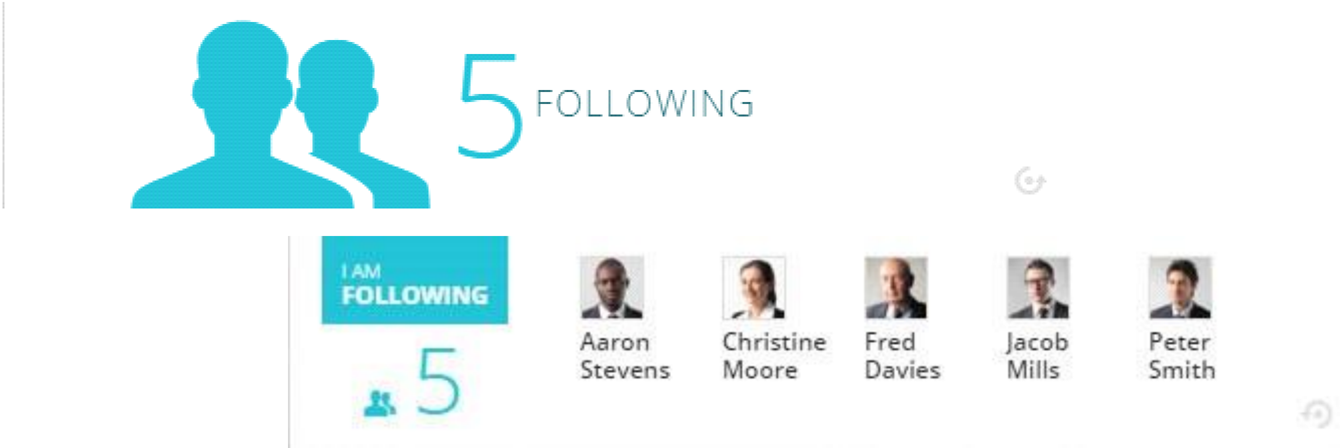
The Hubble components that further collaboration within your organization include:

- **Following** - Follow people and views so that you can quickly connect to who/what is most relevant to you
- **Discussions** - Connect conversations to the information, all in a single place
- **Personal Messages** - Communicate directly with others within the application
- **Groups** - Share workspaces with a group of users and have discussions within a group
- **Tasks** - Maintain user to user tasks as well as approval tasks
- **Distributions** - Manage approval workflows within Hubble

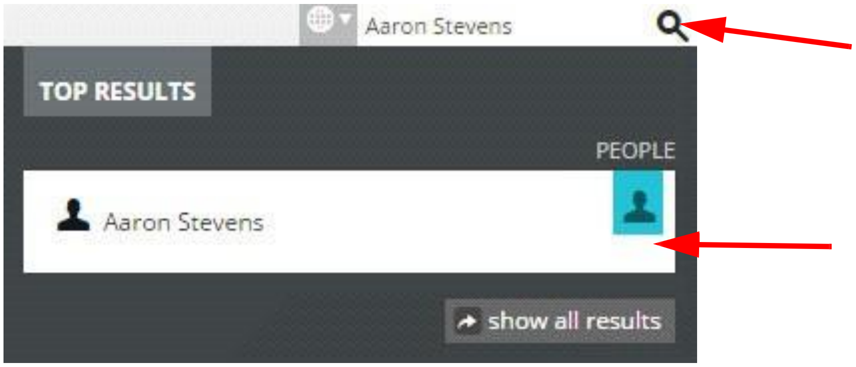


Following

Follow people and views so that you can quickly connect to who/what interests you the most! When you follow a person, you know when they post discussions so you can see information that is relevant to you.



To follow a person, search for the person in your search screen and select the person's name.



This will show you their profile page. The top right area has a follow button.

Similarly, you can unfollow a view in the same manner:

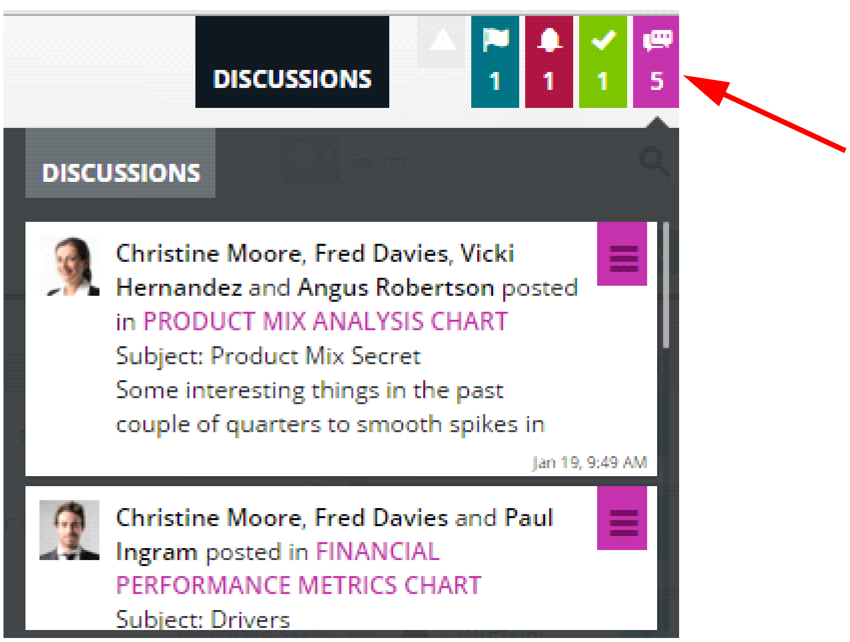
Discussions

Users can have discussions around a certain view, linking the discussions and the information together in Hubble so everything is seen in 1 place. Discussions provide the ability for people to share their knowledge with other users in the organization, which is very powerful for adding rich value to the information.

You can add discussions to a view, comment on it, and search for words used in that discussion. Any user with access to this view can see this information. Everyone in the organization can benefit from access to the information and conversations around it.

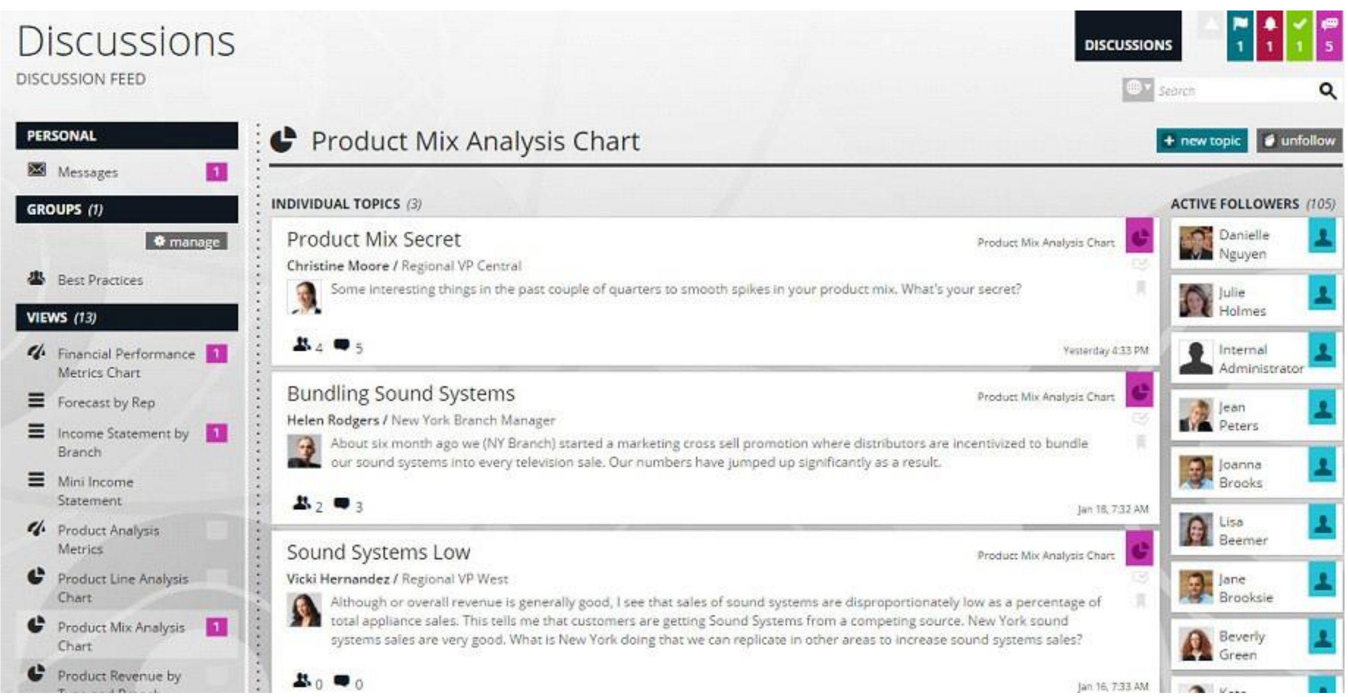
Every view has its own discussion. Only those with permissions to the view can see the discussion.

Quickly see how many unread discussions you have in the Discussions Badge, and click on it to see the full discussions:



Another way to see your unread discussions is on the Hub.

When you click on a discussion from the Discussions Card, you get to the Discussions Feed where you can see all of your discussions:

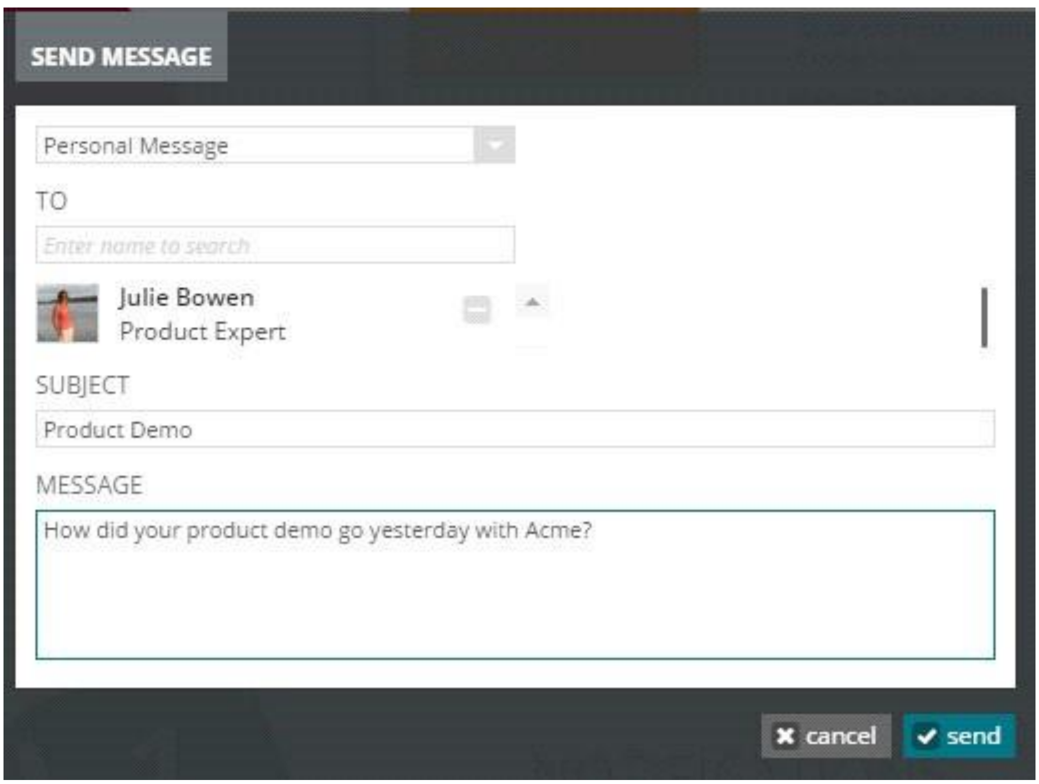


Personal Messages

Use Messages within Hubble to communicate directly with other Hubble users. Personal messages are not searchable.

From any page within Hubble, you can quickly send a message by clicking on the drop-down from your picture in the upper right corner and selecting **Message**:

You can then send your message to another user:



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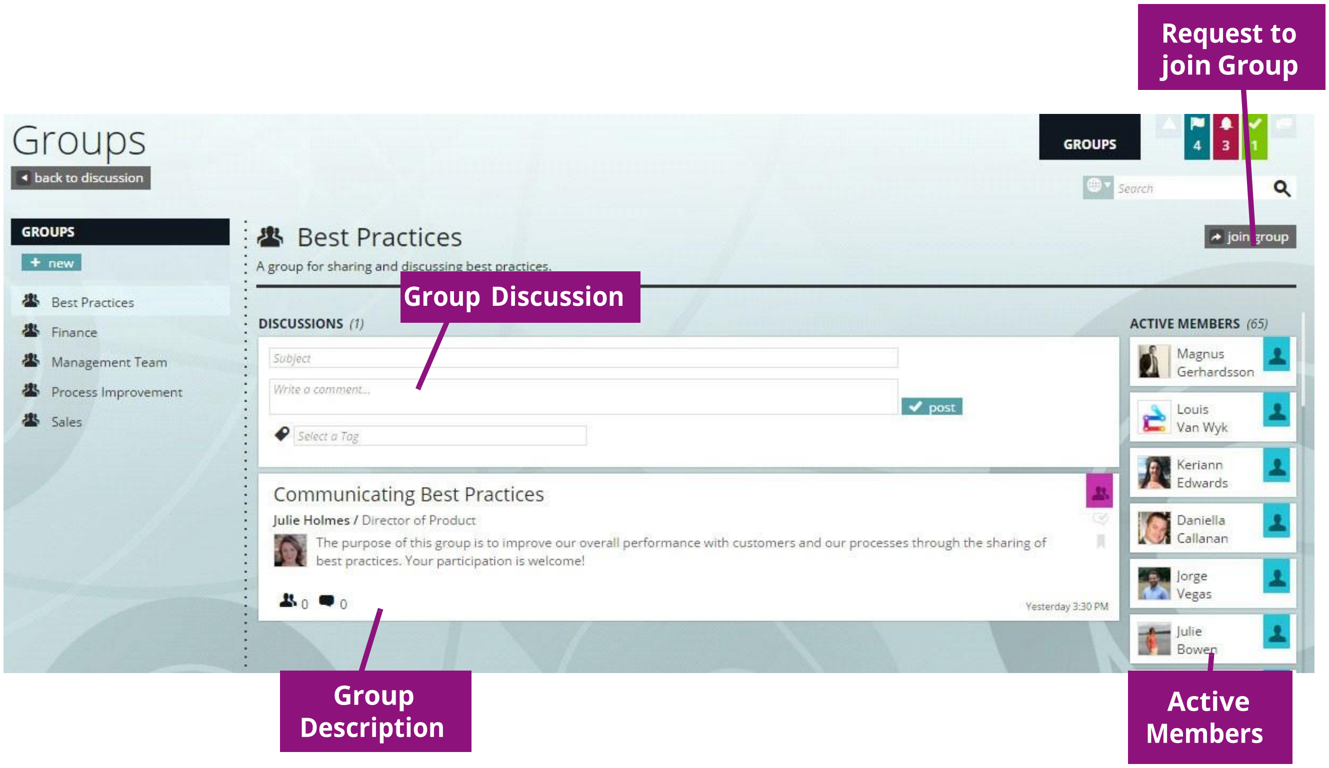
Another way to message someone is to search for the person in the search screen and click on the person's name, which brings you to their profile page. You can then click **Send Message** from there.

From the Hub, you can quickly see what unread messages you have and then drill down to them, if desired.

Drilling down brings you to the Discussion Feed, where you can see all your personal messages:

Groups

Use Groups within Hubble to bring together users with a common interest or function. This function is very beneficial because you can have discussions with the group, and members are always notified when a discussion takes place. You can also share workspaces with a group.



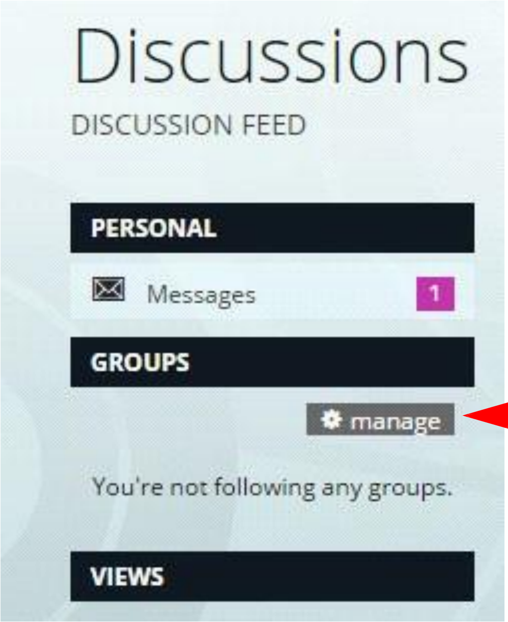
Groups within the Hubble Web Application are not the same as the User Groups set up in the Hubble Administrator Tool.

Creating a Group

Follow these steps to create a group:

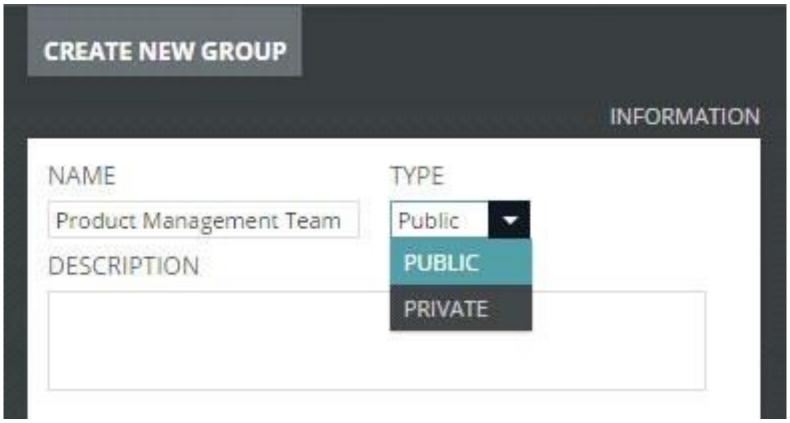
1. Go to Discussions.

2. Click **Manage**.



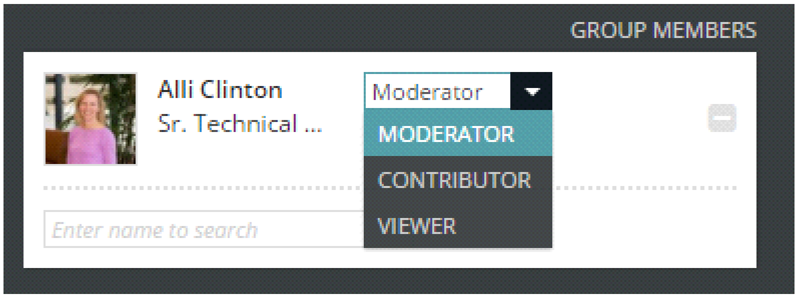
3. Click **New** to create a new group. From here you can also see other public groups.

4. Enter a name, type (public or private), and optional description.



   a. **Public** - Any Hubble user can view the group
   b. **Private** - You must be added to the group by the moderator and the group is not visible to all Hubble users

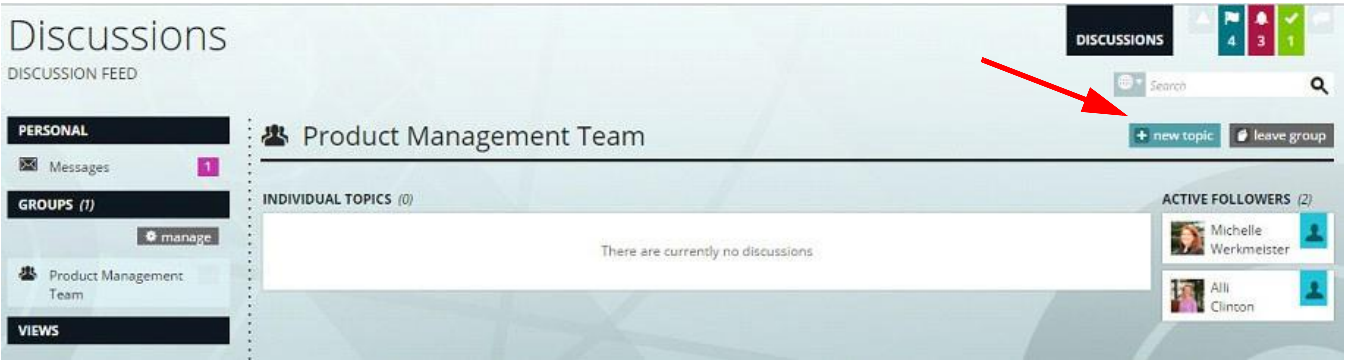
5. Add members and their roles.



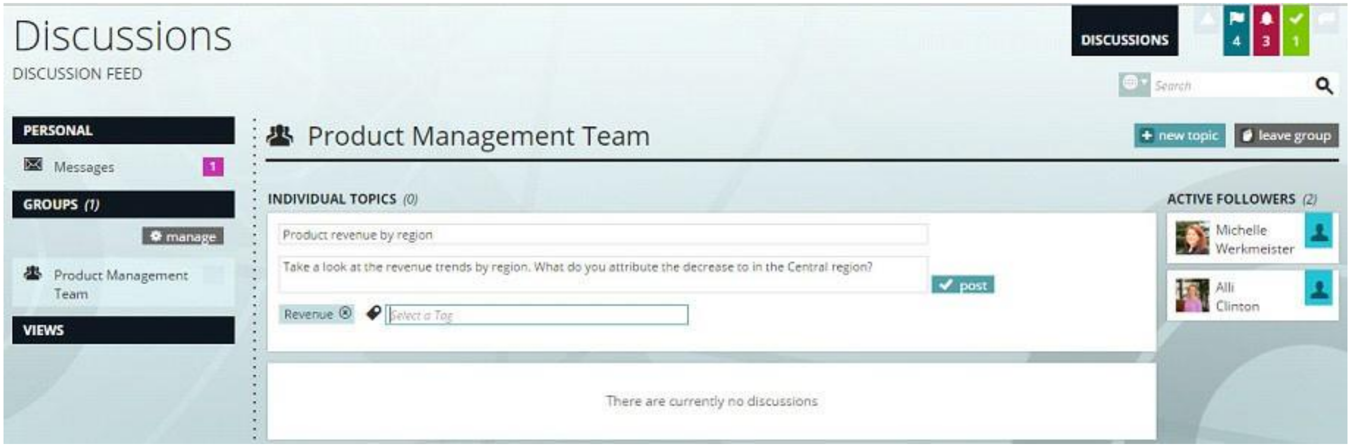
a. **Moderator** - Can add/remove group members as well as read and post comments within discussions
b. **Contributor** - Can read and post comments
c. **Viewer** - Can read comments

Create a Discussion within a Group

Once a Group is set up, you can create a new discussion by going to that Group within Discussions and selecting **New Topic**:



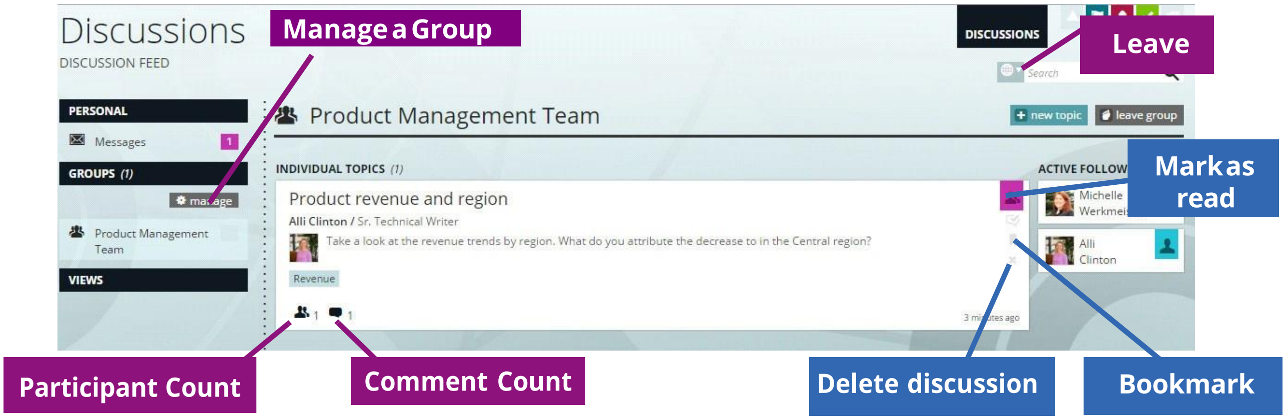
Enter in the topic, comments, and optionally, any appropriate tags. Post when finished.



At any time you can go to the Discussion Feed and manage groups, create new discussions, comment within discussions, and leave a group.

Always click on a specific group first on the left side of the page, and once within a Group you can create a new discussion as well as comment within discussions.

Within a discussion, click on **Participant** or **Comment Count** to add a comment.



Messages within a discussion are searchable.

Sharing Workspaces

There are two methods that you can use to share workspaces with other users:

- Send copies of workspaces to users and user groups using the **Send a Copy** option.

  This option sends a snapshot or *definition* of the most recent saved version of a workspace to other users. They can work on these snapshots and make changes to them. These changes will not update the workspace a snapshot was shared from, or snapshots of the same workspaces shared with other users.

- Share the workspaces themselves using the **Share** option.

  This essentially makes a workspace (as currently saved) available for other users to view and, if given sufficient access rights, work on in real time.

  Workspace can be shared using the **Share** option to both individuals and groups.

Using this option, workspaces can be shared with other users in the following ways, each of which grants different levels of access to a shared workspace:

- **Full Access** - The recipient users have full control, as if they had created the workspace.
- **Read-Only** - The users have the ability to share the workspace as Read-Only to other users and can change the workspace, but cannot save over the original.
- **Locked** - The workspace cannot be changed and the users cannot share or save a copy of the workspace.

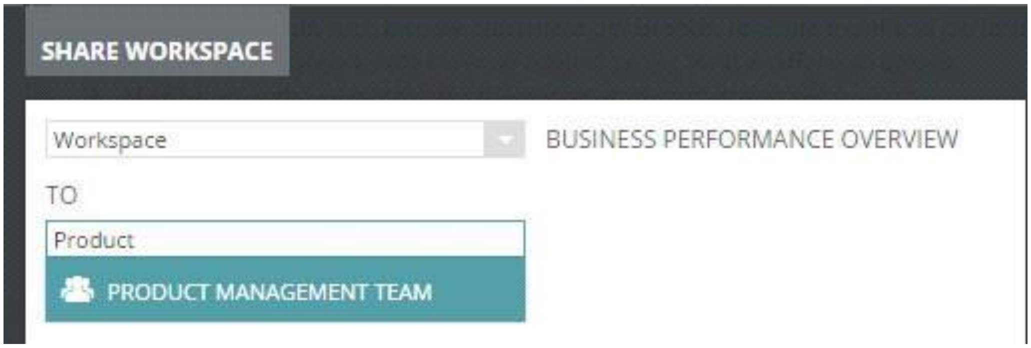
More detail is provided in the following paragraphs.

Share a Workspace using "Send a Copy"

To share a workspace in this way, follow these steps:

1. Open the workspace and go to **Send** > **Send a Copy**.

2. From here you can select individual users or user groups to share the workspace with.

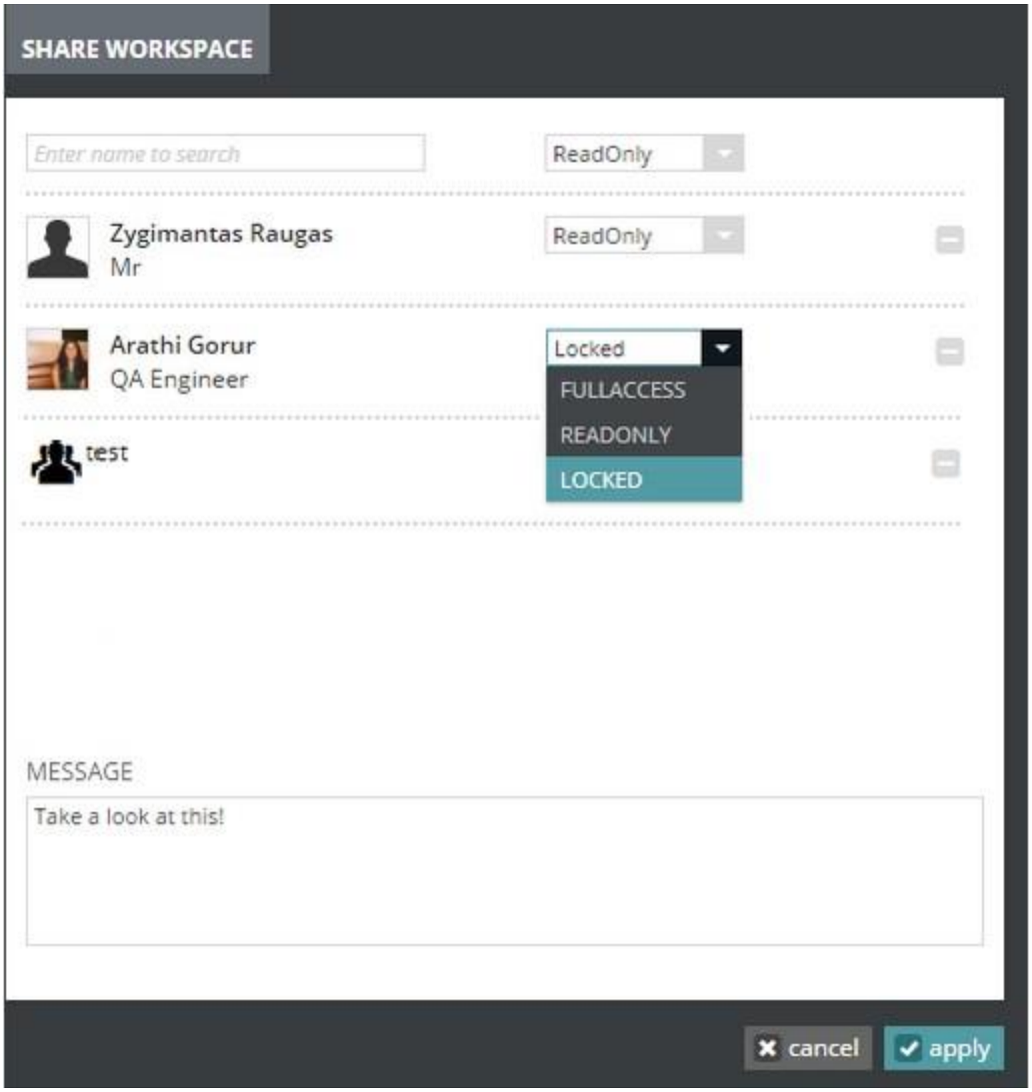


Share a Workspace using the "Share" Option

Open the workspace and go to **Send** > **Share**.

The Share Workspace Window

The **Share** option opens the **Share Workspace** window:



This window is used to search for and select the users and user groups that the workspace is to be shared with. Use the search field at the top of the window to do this.

Once users and user groups have been selected you can then specify, for each individual user and group, whether the workspace is to be shared to them with Locked rights, Read-Only rights (the default), or with Full Access rights.

Note that:

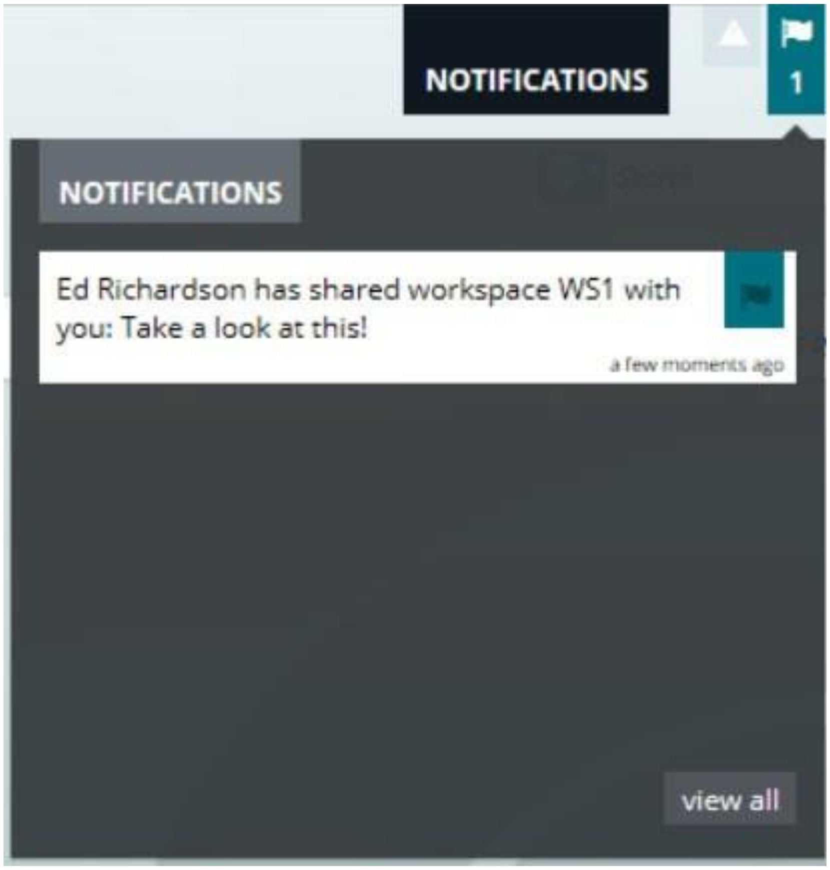
- Users with whom a workspace is shared may themselves share that workspace. However, users that have been shared a workspace with Read-Only access can in turn only grant Read-Only access when sharing, and Locked rights do not allow for further sharing.

- If a user has a workspace shared to them twice, i.e. both as a selected individual, and as part of a group, and the access rights assigned to each of these shares is different, then the highest level of access of these shares is granted, the highest being Full Access and the lowest being Locked. Therefore:
  - If a user has them same workspace shared to them twice, one with Full Access and one with Read-Only rights than the user will be granted Full Access rights.
  - If a user has them same workspace shared to them twice, one with Read-Only rights and one as Locked a than the user will be granted Read-Only rights.

See below for more information on the Read-Only and Locked access options.

The buttons with the minus signs on them are used to remove users and groups from the share. A user or group removed from a share will no longer be able to find the shared workspace e.g. by using **Workspaces > Browse All**.

The **Message** field at the bottom of the window is used to enter the message that the selected users will receive when they are notified that the workspace has been shared with them. For example:



Read-Only Restrictions

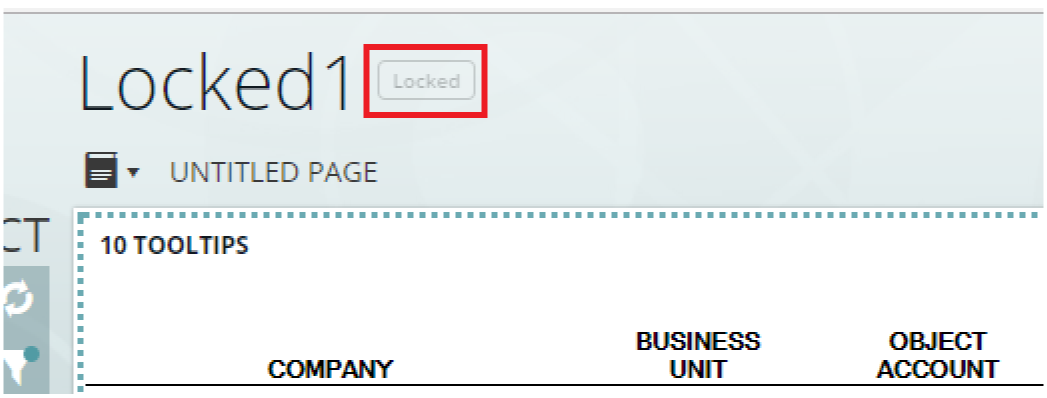
Read-only users can only change a workspace in certain ways. For example, they can make changes to filters, or to the positions of the elements of the workspace for their personal use. However, they may not save over the original shared workspace.

Changes made by Read-Only users cannot be saved to the shared workspace, and are not visible to anyone else. When a user with Full Access rights saves the workspace, the workspace that Read-Only users are viewing will change to the saved version unless they save a copy (they will receive a notification presenting this choice at the time, as explained below).

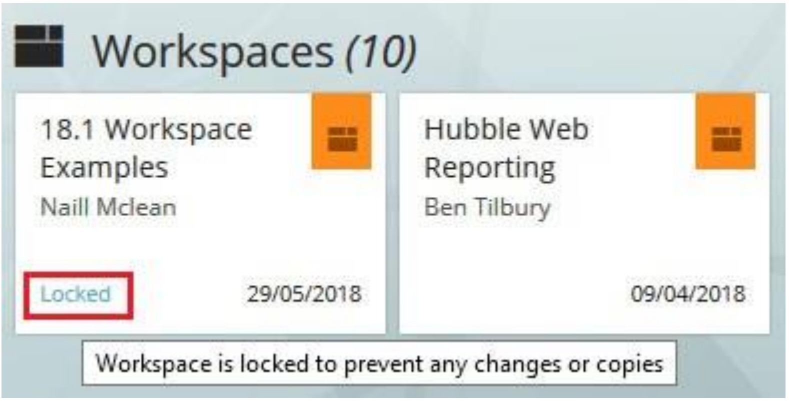
Read-only users can only save copies of a workspace. When they click on **Manage > Save** only the option to **Save As** will be available to them.

"Locked" Workspaces

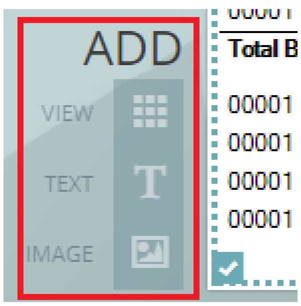
When viewing a Locked workspace it will say "Locked" next to the workspace title to indicate this. For example:

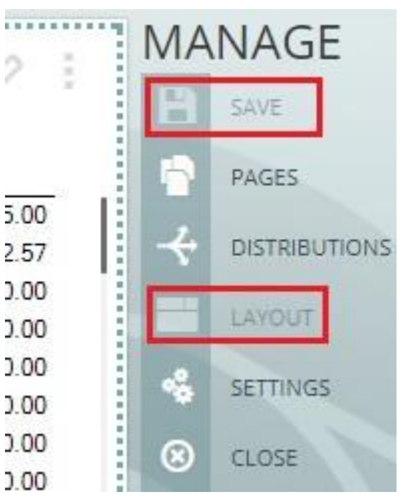


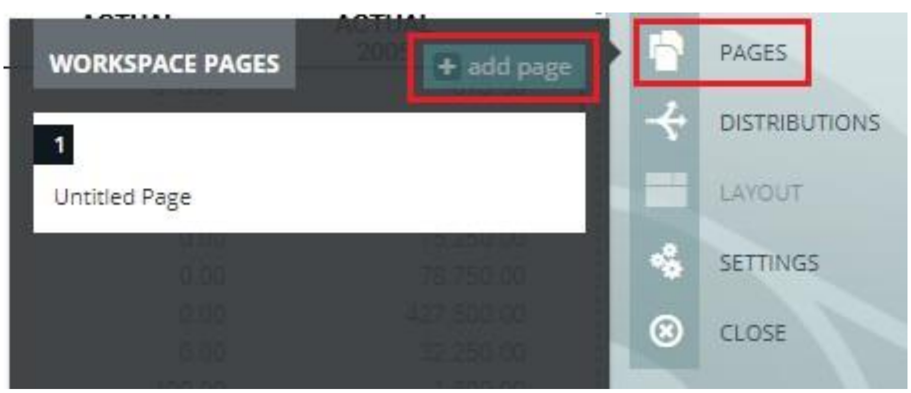
The indicator is also displayed while browsing through the workspaces. Hovering the mouse over the indicator displays the following message: “This workspaces is locked to prevent changes or copies”:



You will not be able to make any changes to Locked workspaces, change their layout, or to save them; the **Add** menu options are disabled, along with **Save**, **Layout** and **Pages > Add Page** options in the **Manage** menu.

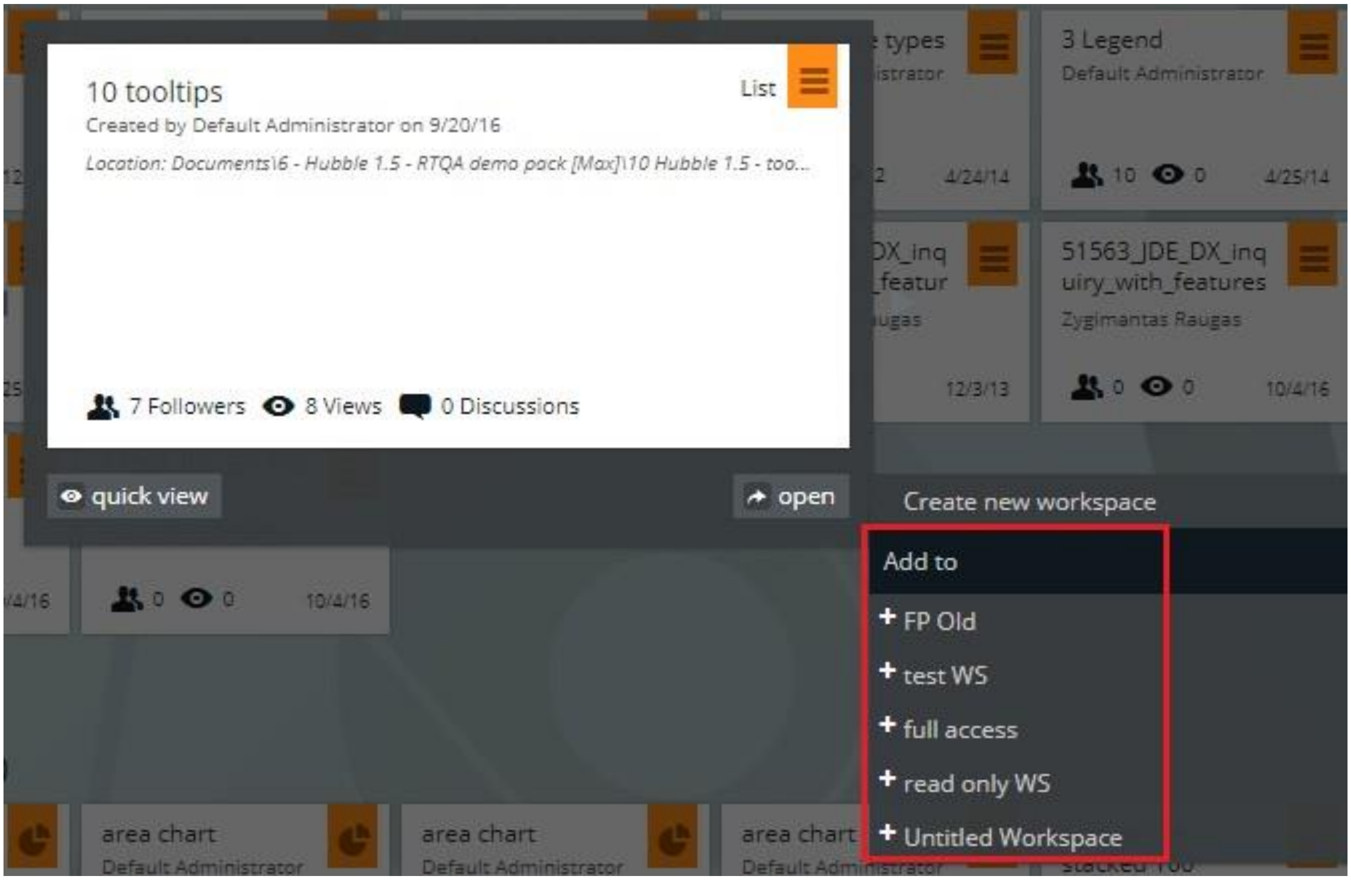






In addition:

- Users may not close views in a Locked workspace, move views around the page, or move the views to different pages.
- Users cannot send a copy of the Locked workspace to another user.
- User cannot add a view by searching for it in a Locked workspace, and the option to add a view to the current workspace is not available:



The user can still:

- Maximize, minimize, resize, and drill-down into views.
- Apply custom filters to a locked workspace. These filters will be included in PDFs generated by the **Send > Save PDF** option.

Note also that:

- When a Locked workspace user sends workflow approvals to other users, the user's custom changes are also included.
- When a Locked workspace user sends advanced distributions to other users, only the saved copy of workspace is distributed.

Another limitation of Locked workspaces is that users granted this access level to a workspace cannot share it with other users. The controls used to select users etc. are not available on the **Share Workspace** window.

The window does however display the other users and/or groups that the workspace is currently shared with, plus their respective access levels.

For example:

Handling Changes to a Shared Workspace by Different Users

As a workspace can be shared with multiple users, this may result in multiple users working on a workspace and trying to make and save changes to it at the same time. This section explains how such situations are handled.

Changes to a shared workspace are detected either when the current user saves, or if the workspace is refreshed when:

- the workspace is opened, and
- it is already open and the user refreshes the browser.

The refreshing of views that occurs in Present mode does not refresh the workspace.

As explained above, it is possible for two (or more) users to make changes to the workspace at the same time. For example, the following situation may arise:

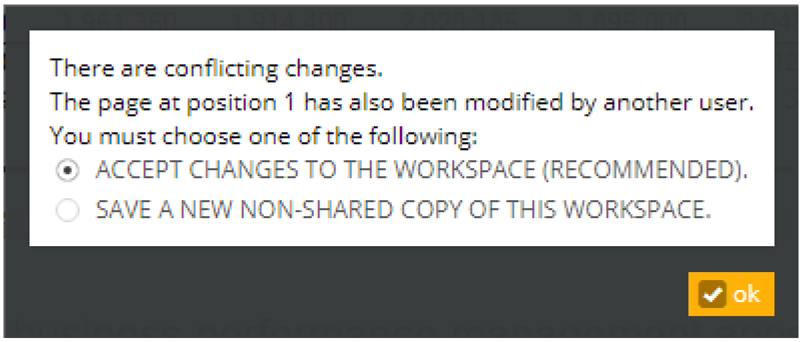
1. Two users have a workspace open.
2. User 1 makes changes to the workspace but does not yet save them.
3. User 2 makes and changes to that workspace and saves them.
4. User 1 then tries to save their changes, or refreshes the workspace.

If both users have added/removed views on the same page, this results in a conflict that cannot be automatically resolved.

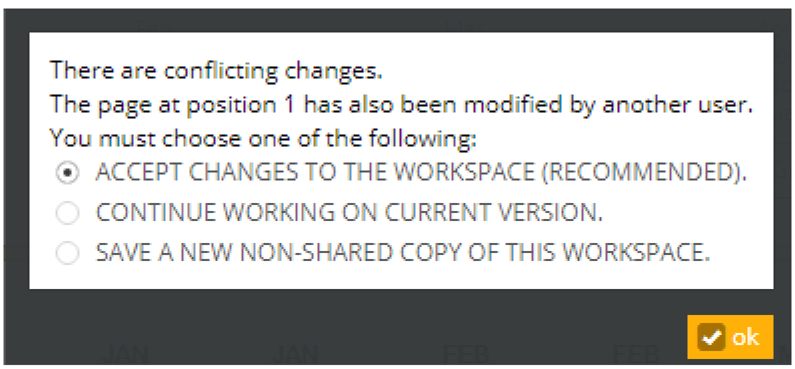
If User 1 is Read-Only, they will be presented with the choice of either:

- **Accept Changes to the Workspace (Recommended)**, which will result in their own changes being lost, or
- **Save a new non-shared copy of this workspace**, which will save their change and update the original to include the changes from the owner.

For example:



If User 1 has Full Access rights, they will additionally have the option of to continue working on the current version. When User 1 saves then the User 1 changes will saved as the new layout. For example:



The following changes will not cause a conflict:

- User 1 and User 2 save changes to separate pages.
- User 1 has changed the content of a page and User2 has re-ordered the pages or edited titles/ descriptions (or vice versa).

After resolving conflicts, or when there are no conflicts, the last Full Access user to save will always have their changes saved.

Notes

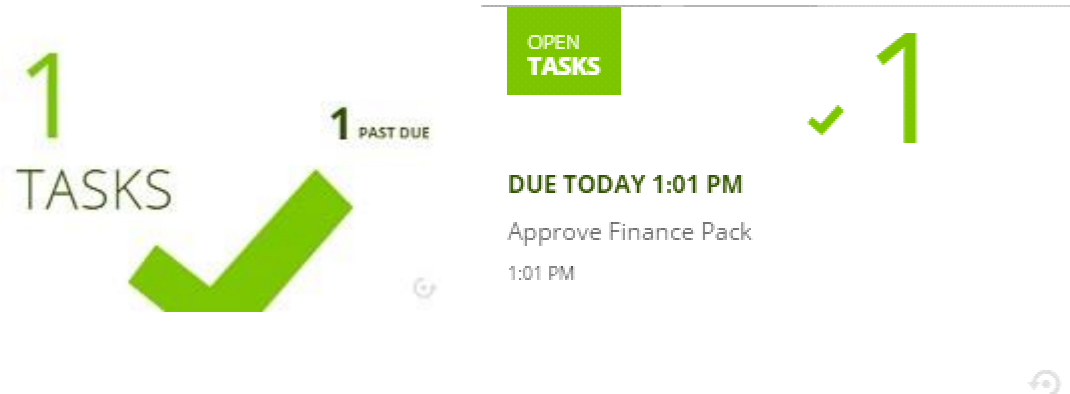
- Shared workspaces can be found using **Workspaces > Browse All** without having to have first opened them via a notification message.

- If a recipient of a workspace does not have permissions to see a report in it, they will see the following message instead: “Insufficient permissions to open this view”. Exporting to PDF will fail if the user does not have permissions to a view.

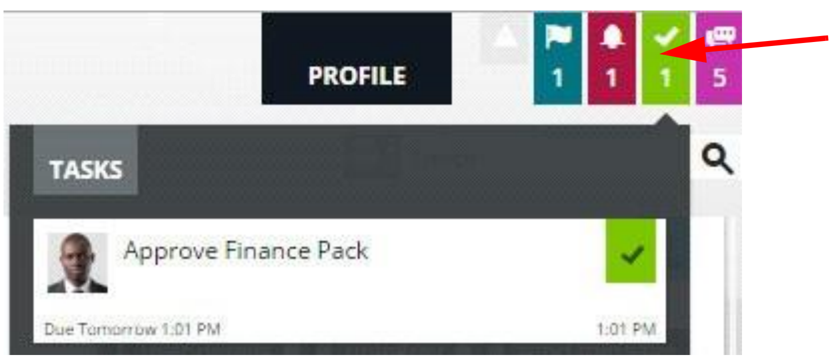
Tasks

Within Hubble, there are user to user tasks as well as tasks from approval workflows.

From the Hub, you can quickly see any task assigned to you and see if any are past due by looking at the Task Card.



Alternatively, you can click on the Tasks Badge to see your open tasks:

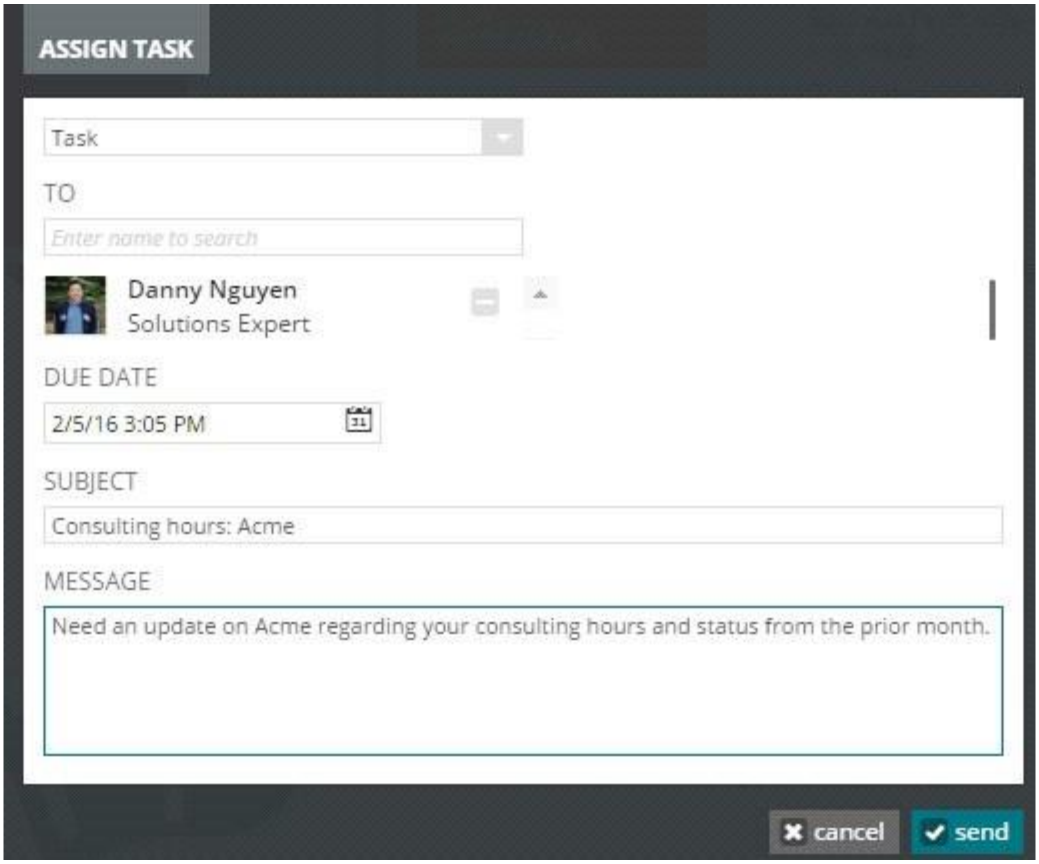


Creating a User to User Task

Follow these steps to create a task for another user.

1. From any page within Hubble, click on the drop-down from your picture in the upper right corner and select **Message**:

2. Create the task.



The other type of task is an approval, where you have the ability to take any workspace and create an approval system including who needs to participate and when. Then that information is sent around in a shared PDF.

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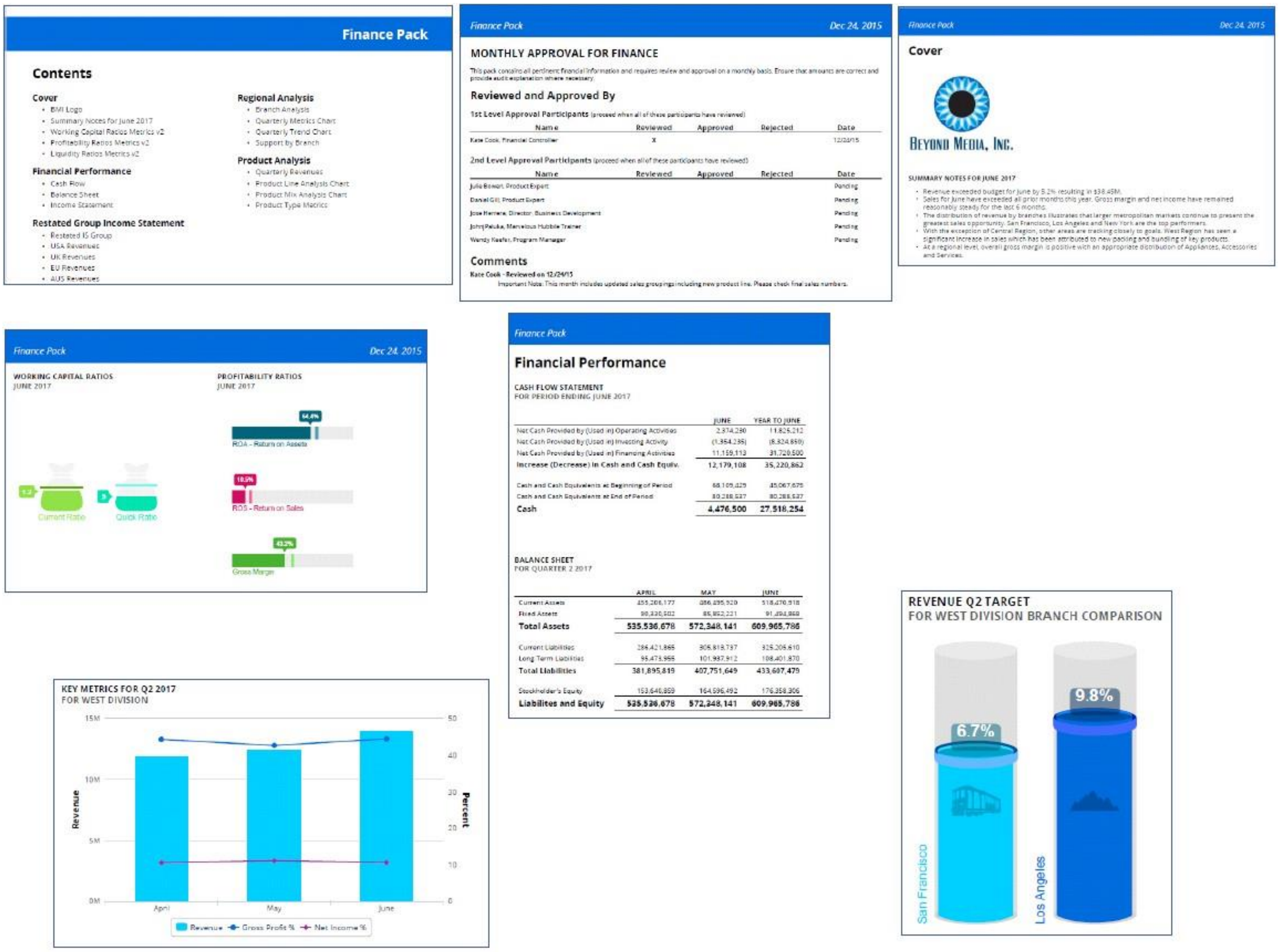
In a shared PDF, you can see the detailed approval information: comments, images, text, metrics, charts and list views that are all part of the approval process. The PDF can be used for history and auditing purposes. After looking at a PDF, you can look at the live view and approve or reject.

The approval is completely searchable, and people in the approval process always have access to the PDF.

Example of a PDF created for an approval:



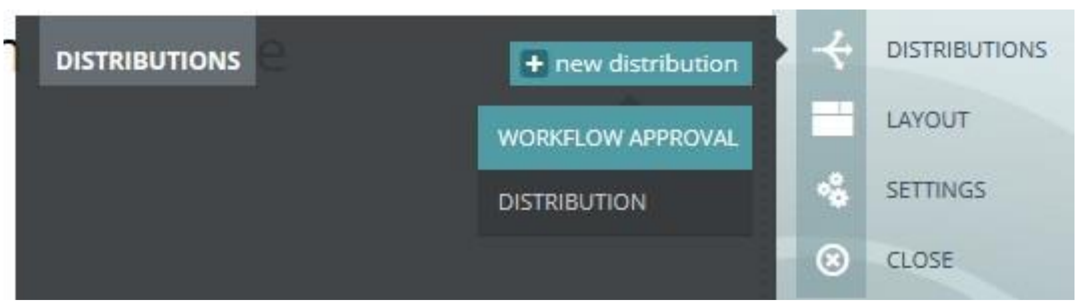
Distributions

Distributions, also known as approval workflows, are created by following these steps.

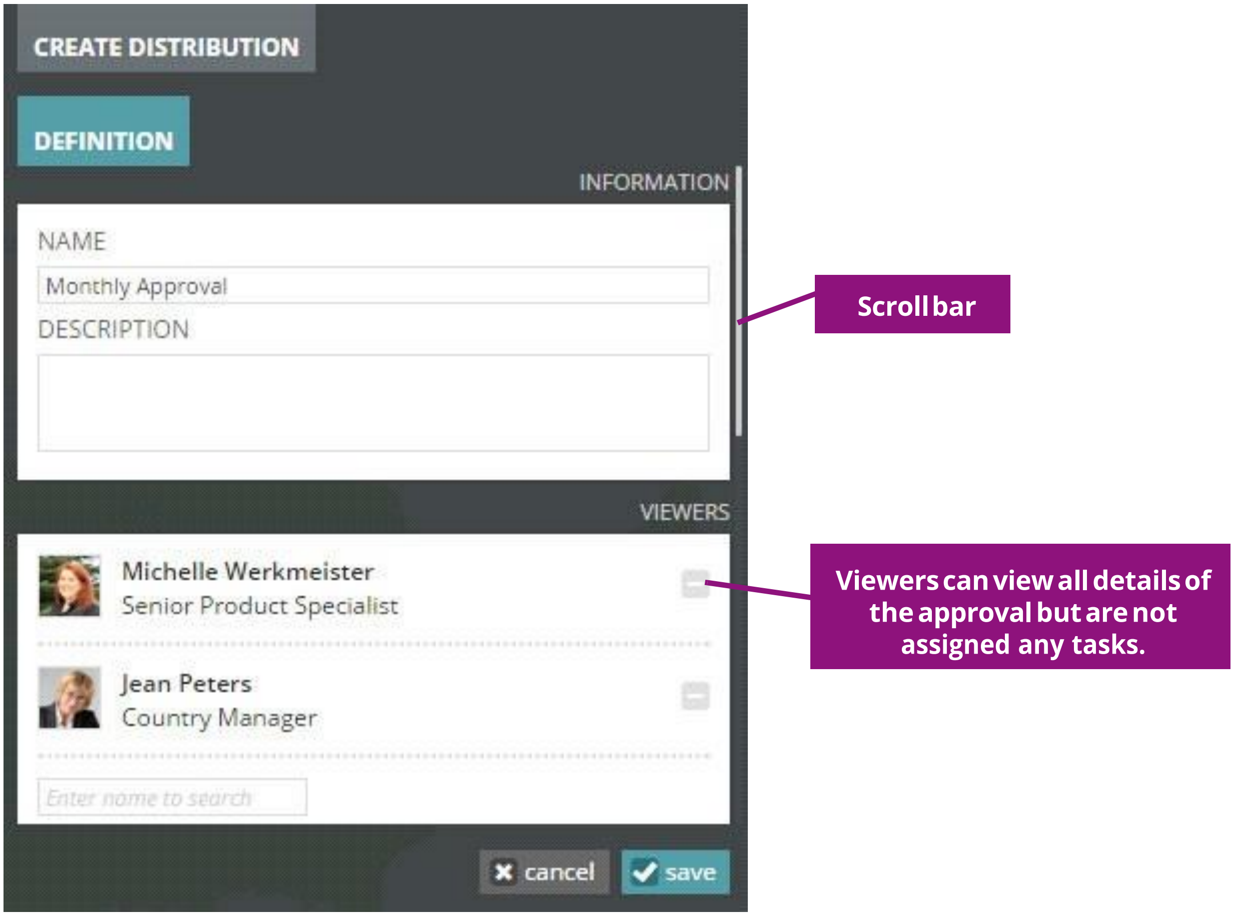
You do not need to save a workspace before creating distribution for it. However, Workspace Approval distributions will not include any unsaved changes.

1. Highlight the view for which you want to set up a distribution.
2. Under **Manage** on the right side, click **Distributions**.

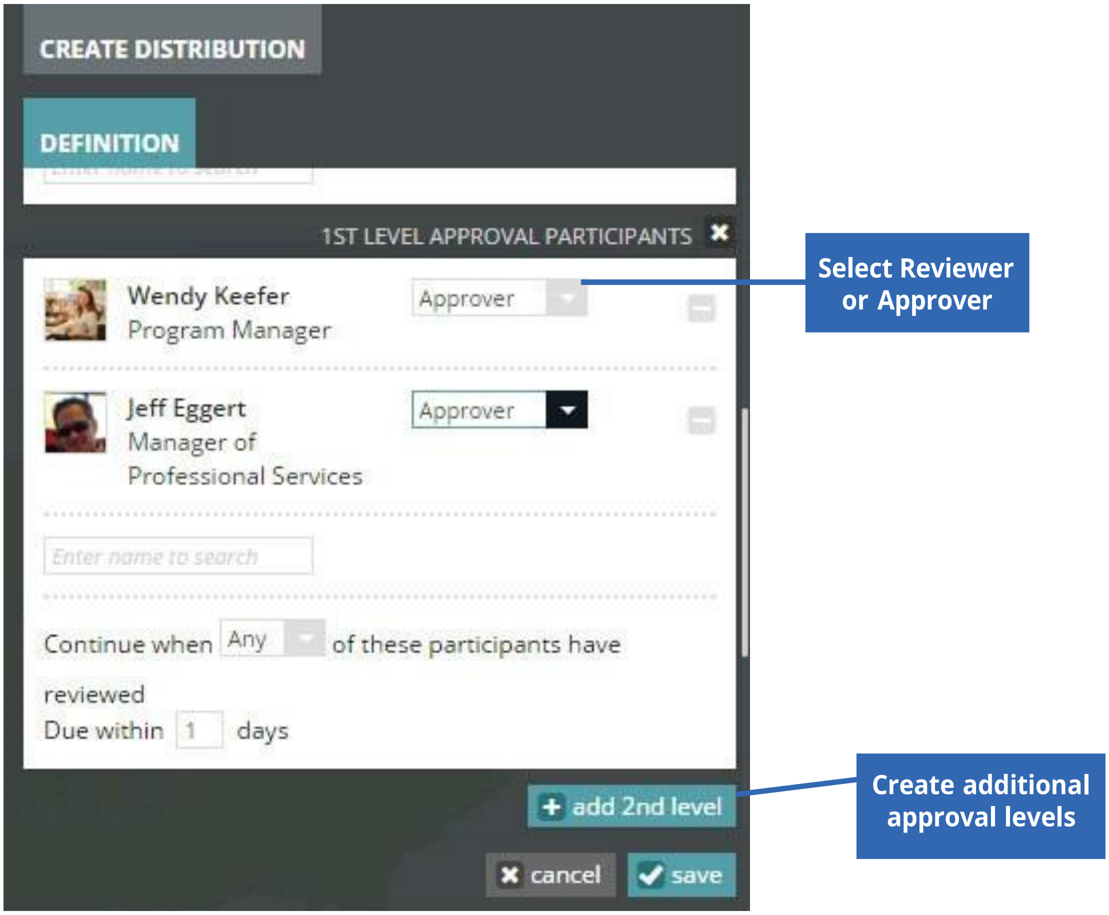
3. Click**+ new distribution** on the **DISTRIBUTIONS** sub-menu, and then select the **WORKFLOW APPROVAL** option.



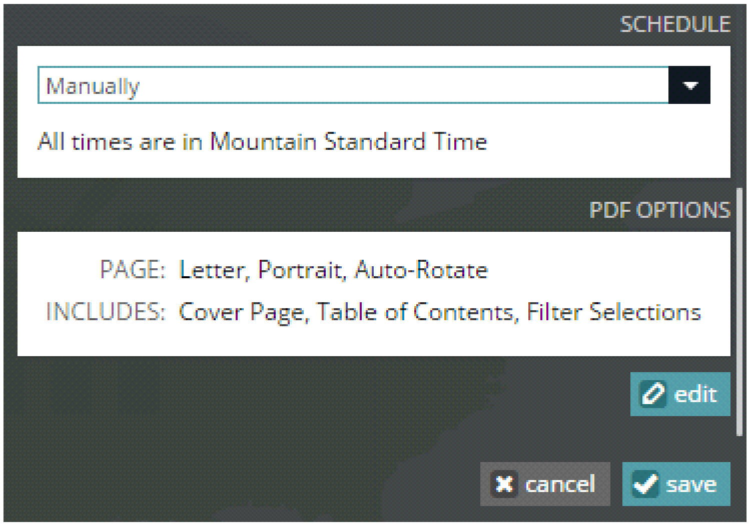
4. Enter in the requested information, viewers, approval participants, schedule and PDF options. (Use the scroll bar to view all sections.)



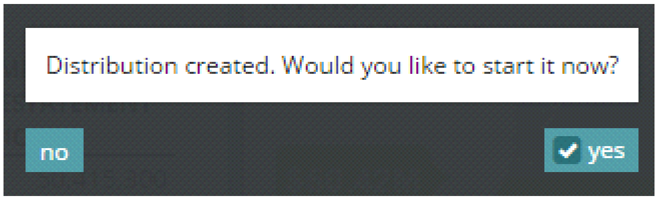
5. In the Participants Section, set up the levels of approval. Once you have identified the participants, select whether each one is a reviewer or approver. At any given approval level, set whether any of the participants can review or if all of them need to review, as well as the due date. Both reviewers and approvers are assigned tasks.



6. Then set the schedule as well as the PDF Options. Scheduling is optional and can be set to repeat (e.g. daily or weekly) or can be for specific dates. We recommend not setting this up for more than 6 months at a time.



7. Once you click **Save**, you are given the choice to start the Distribution immediately or not.



8. Once you have started a distribution, an Activity tab is created, and from here you can see the status and view the PDF.

9. When you click **View PDF**, the PDF automatically downloads and you can open it as soon as it finishes.

Approvals trigger a workflow. Reviewers will receive a notification and must acknowledge it. Approvers will receive a notification and must approve it. Approvals provide verification if users have really opened the PDF.

Once a task is started, it creates a task. If there is an asterisk (*) by a user's name, it means that it has not yet been reviewed.

Advanced Distributions

Introduction

The Advanced Distributions functionality is distinct from the basic “Workflow Approval” distribution functionality. It includes advanced features such as the ability to distribute to groups and to filter the distributed data. It consists of the following features:

- Advanced Distributions are created from the Web.
- One workspace can have many distributions.
- One distribution user can have many distributions.
- A distribution user can receive an email for each distribution.
- A distribution can be created for one or many email addresses.
- Filters are selectable for the distribution.
- Distributions can be scheduled or triggered manually.

Differences between Standard and Advanced Distributions

The main differences between Standard and Advanced Distributions are as follows.

Standard Distributions:

- Recipient requires Hubble ERP License
- Recipient must log into Hubble
- PDF
- Do not include unsaved changes

Advanced Distributions:

- Recipient does not require ERP license
- Recipient does not need to log into Hubble
- Dashboard HTML (Static)
- Include unsaved changes

Prerequisites

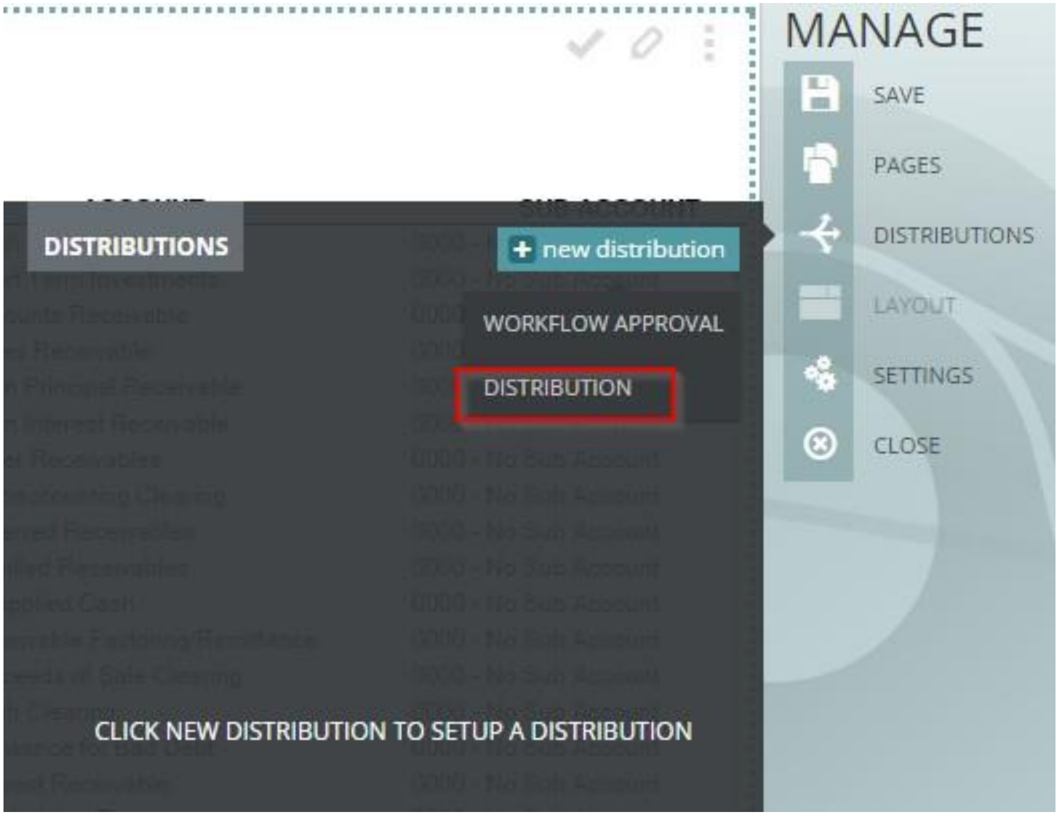
Advanced Distributions is a chargeable feature activated by applying the DIS license key to the repository. The key is global and does not need to be assigned to individual users.

Creating Advanced Distributions

The Distributions feature is on the **MANAGE** menu of the Web interface. Note that a workspace must be saved before it can be accessed.

You do not need to save a workspace before creating distribution for it. Advanced distributions will include all unsaved changes.

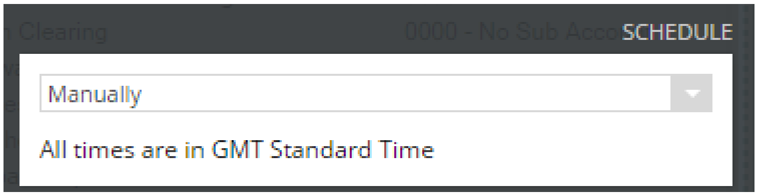
To create a new advanced distribution, click **+ new distribution** on the **DISTRIBUTIONS** sub-menu, and then select the **DISTRIBUTION** option:



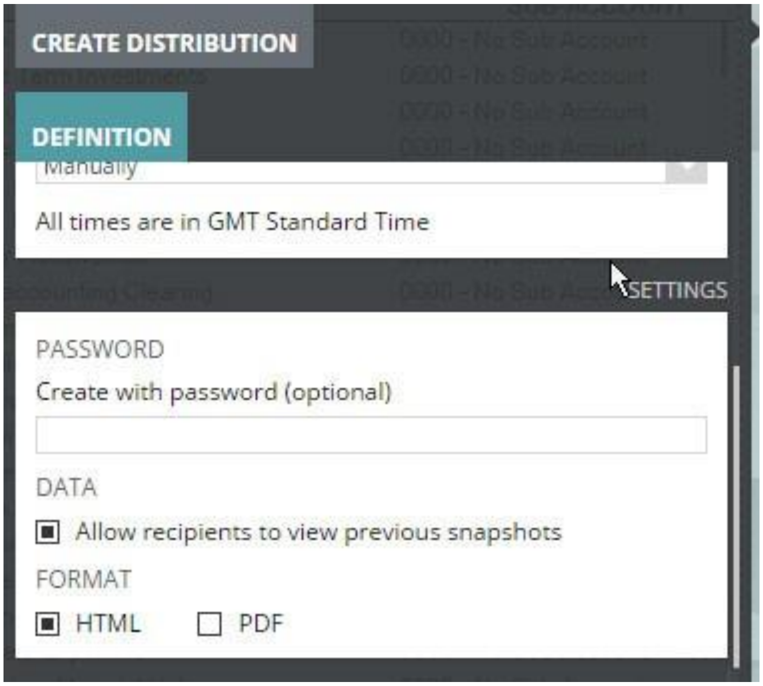
The **Create Distribution** window is then displayed.

Give the new distribution a **Name** and a **Description** that will enable you to easily identify it in a list of available distributions.

Scroll down to the **Schedule** section of the **Create Distribution** window. Here you can either leave the default option set, which is to schedule the distribution manually, or you can set up a schedule of dates, days and times when the distribution will happen. See **Triggering and Scheduling**.



Scroll down to view the **Settings** section:



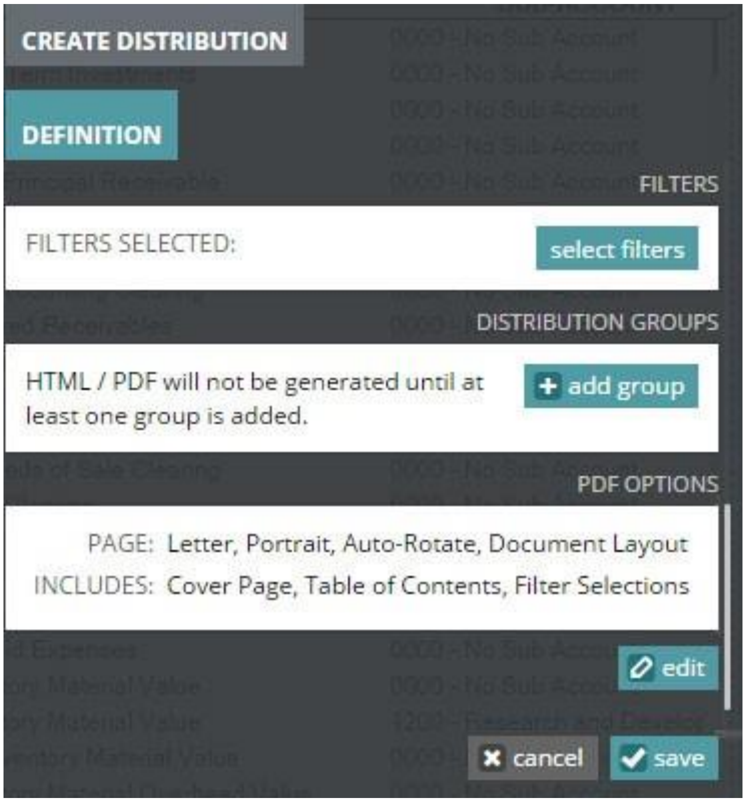
A password may optionally be set. If a password is set, the recipients of the distribution will need to enter it in order to access it. It must be distributed to them manually.

You can select either HTML format, PDF format, or both. If you select neither format, you will not be able to save the distribution. If both HTML and PDF formats are selected, HTML formated distributions will take precedence and will be presented first. If both HTML and PDF formats are chosen, there will also be a download button for the PDF version available from the HTML version.

The list of previous distributions will be displayed in the lower left of the workspace of HTML format distributions, and as a directory listing of PDFs for PDF-only format distributions.

The HTML format provides many of the features of a normal workspace. See **HTML Format** for further details.

Scroll down further to see the **Filters**, **Distribution Groups** and **PDF Options** sections, and the **edit**, **cancel** and **save** buttons.

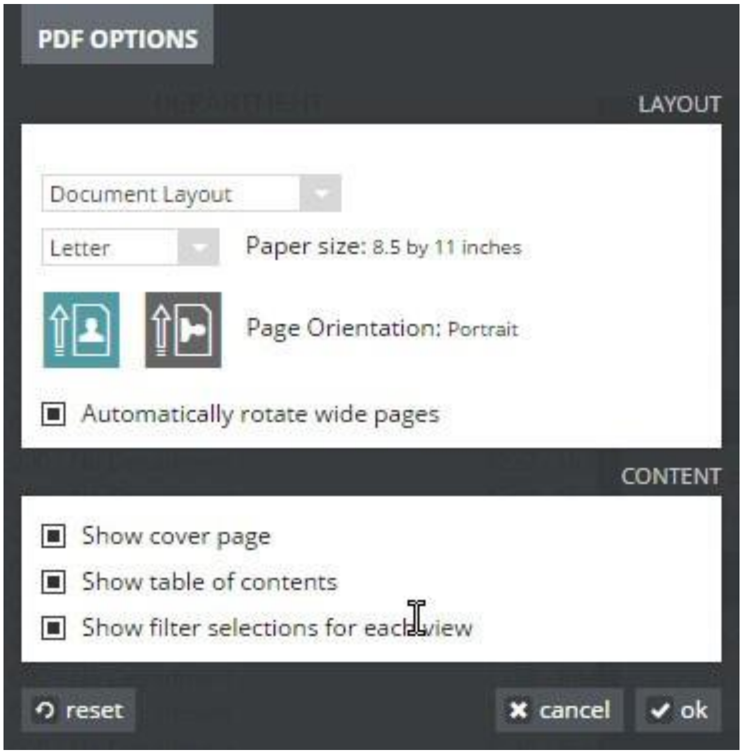


Optionally add filters so that specific groups of users can receive distributions that are tailored to their specific requirements. See **Managing Filters**.

You must create at least one group of users who will receive the distribution. See **Managing Groups**.

PDF Options

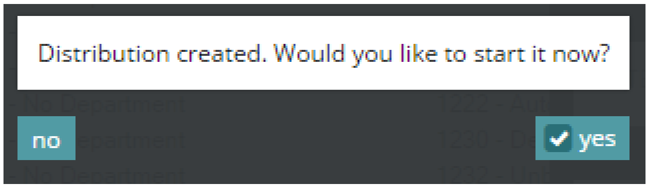
If required, you can change the PDF Options by clicking the **edit** button.



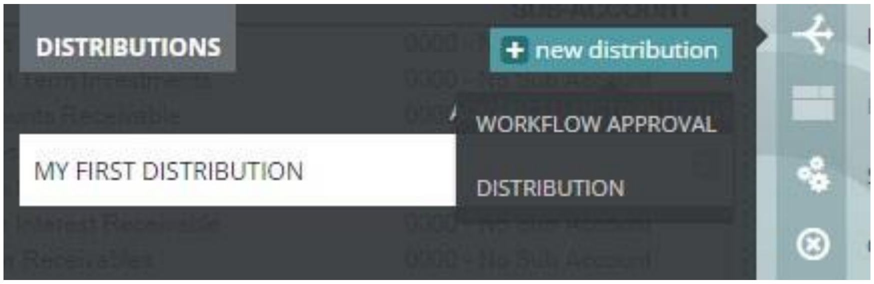
Click **reset** to restore the previous settings.

Saving a Distribution

Once the new distribution has been set up, click **ok** to save it. If it is scheduled be triggered manually, you will be given the option to start it straight away:



The new distribution is added to the list of distributions set up for the workspace:



You can add further distributions by clicking **+new distribution** and then **DISTRIBUTION** again.

To edit or to manually trigger an existing distribution, click on its name on this list. See **Triggering and Scheduling**.

Triggering and Scheduling

There are several ways to trigger or schedule a distribution. As described above, you can start it when you save the distribution if you set it to be started manually.

To manually trigger a distribution at any time, open the distribution and go to the **Activity** tab (this tab is added to the **Create Distribution** window once the distribution is saved). Click the **start distribution** button.

The **Activity** tab displays details of past issues of the distribution and those in progress. The number next to the tab's name is the total of these distribution activities.

When you trigger a distribution or it starts automatically, the **Activity** count will increment and the state of the distribution will appear on the tab (you will need to close and re-open the **Create Distribution** window to see this change).

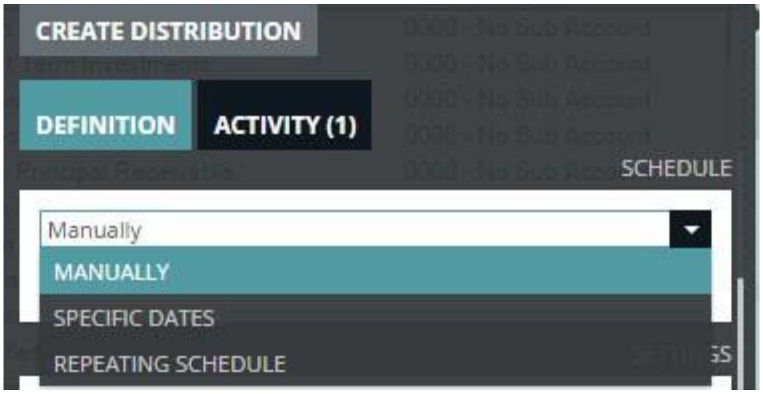
If the distribution is shown as "In Progress" you can attempt to stop it using the **stop** button (it may be too far advanced in the process to stop, however).

If the distribution is successful, links to the output in the format(s) selected for the distribution are displayed:

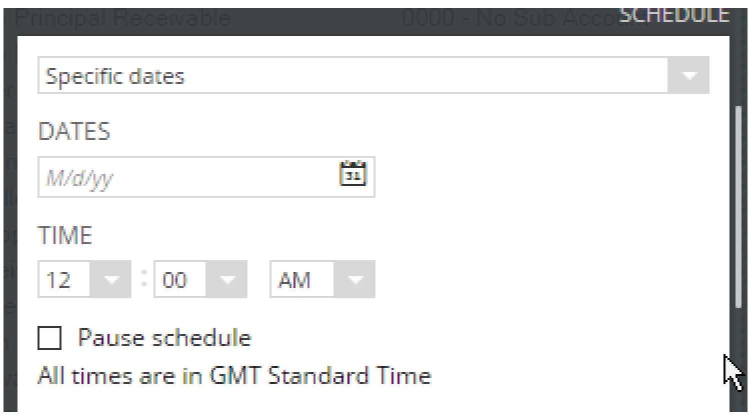
The users selected for the distribution (see **Managing Groups**) will receive notification of the distribution (see **Notifications**).

Scheduling Distributions

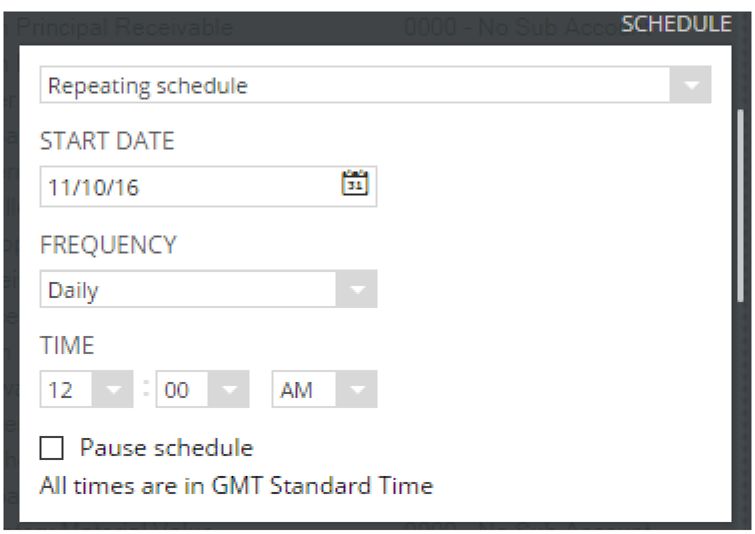
To schedule a distribution, go to the distribution and change the Schedule setting from Manually to **Specific Dates** or **Repeating Schedule**.



The options for the **Specific Dates** setting are:



The options for the **Repeating Schedule** are:



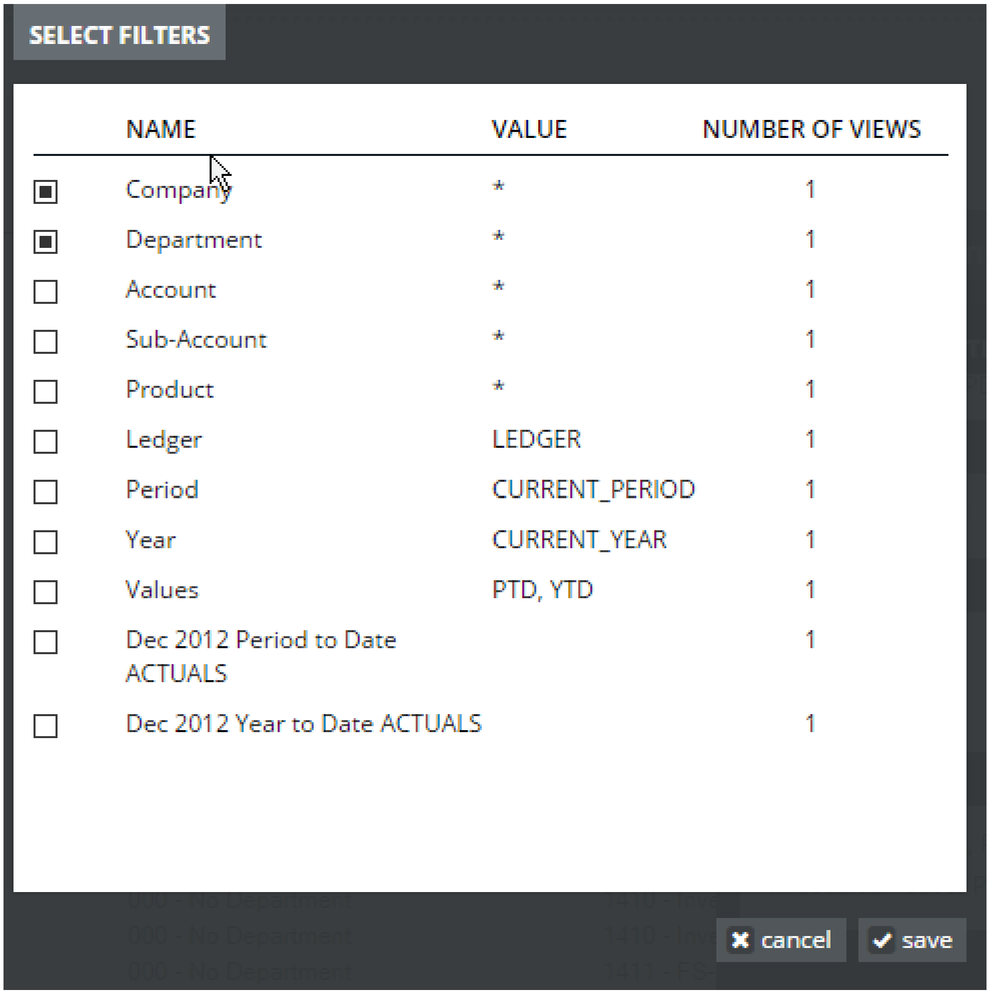
Frequency can be daily or weekly.

By checking the **Pause Schedule** checkbox in the two above cases, you can prevent the distribution from occurring according to its schedule until the checkbox is unchecked.

Managing Filters

Filters may optionally be selected for a distribution, i.e. only data that meets the filter criteria will be included in the distribution. Click on the **select filters** button in the **Filters** section of the **Create Distribution** window.

From the list that is then displayed, you can then select the required attributes that the filter will use.



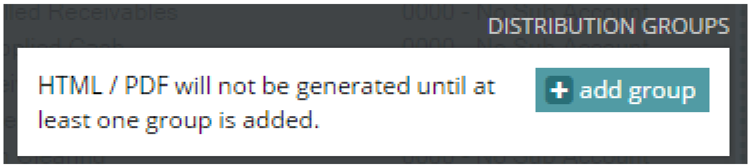
Note that this list may take some time to load as every filter from the workspace needs to be retrieved.

The filter values for the attributes selected are set via the **Distribution Groups** section. See **Selecting Filter Values**.

Managing Groups

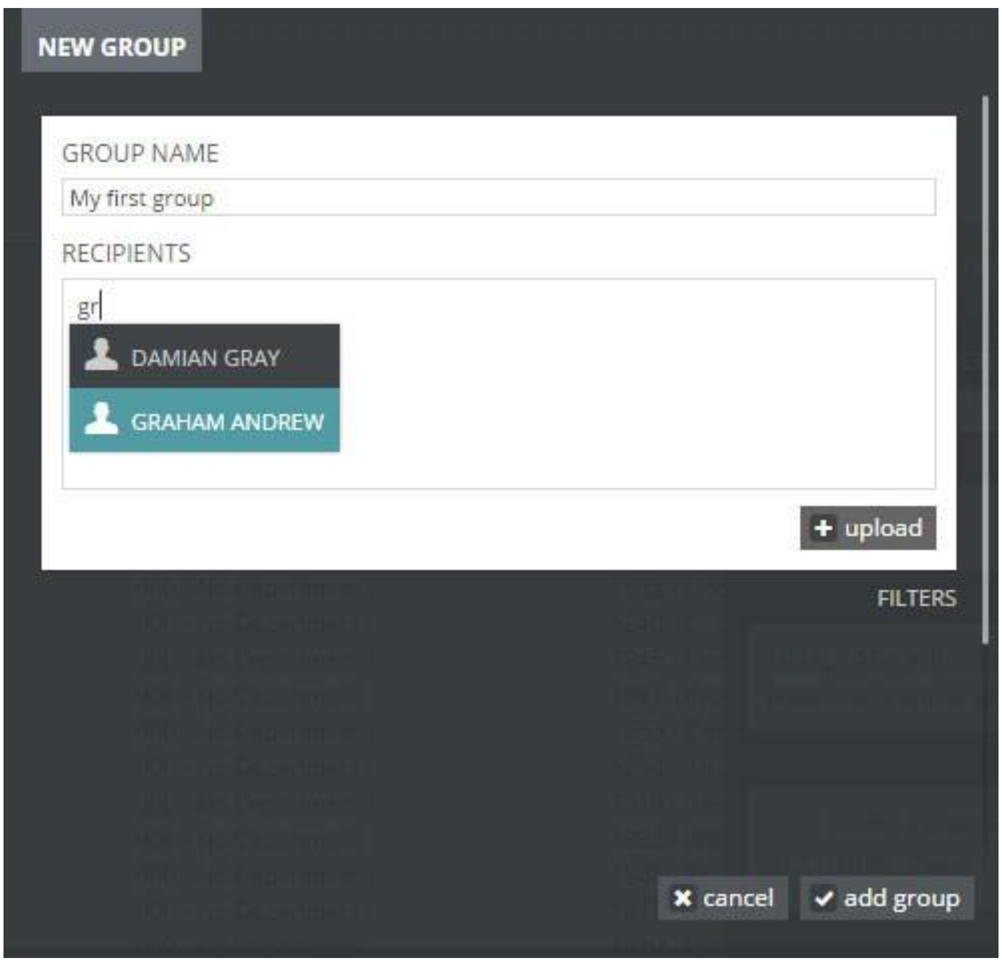
Each distribution must have at least one group of recipients set up for it.

To add a new group to a distribution, click the **+add group** button in the **Distribution Groups** section of the **Create Distribution** window.



In the **New Group** window that is then displayed, give the group a meaningful name and add one or more recipients.

Start typing a user name to see a list of Hubble users that have names beginning with the letters entered so far:

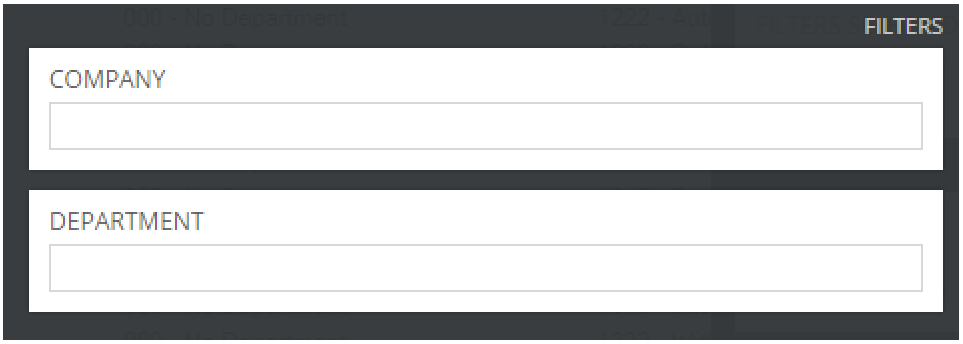


The users selected for the distribution will receive notification of the distribution (see **Notifications**).

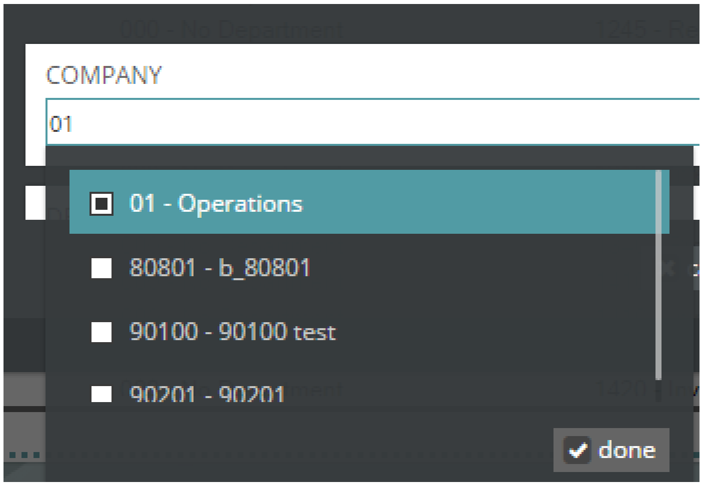
You can also type an email address or upload a list of email addresses from a Excel CSV or txt format file via the **+upload** button. Hubble will automatically parse the email addresses from uploaded files.

Selecting Filter Values

If one or more filters have been selected (see **Managing Filters**), they will be listed below the **Filters** heading.



To select values for these filters, start typing in a field. A list of available values will then be displayed:

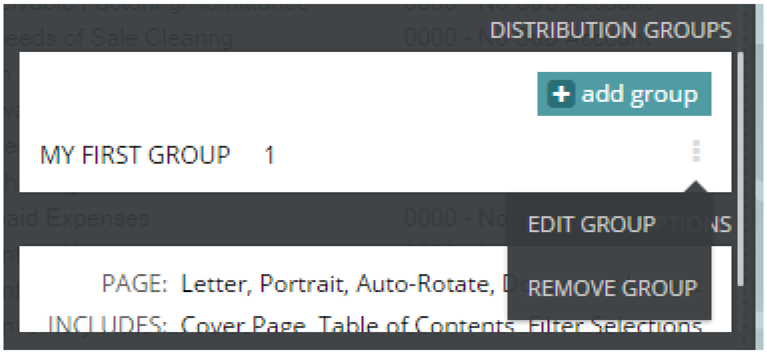


Select one or more available values and click **done**.

Then click the **add group** button to add the group to the distribution. The group is then added to the **Distribution Groups** section of the **Create Distribution** window.

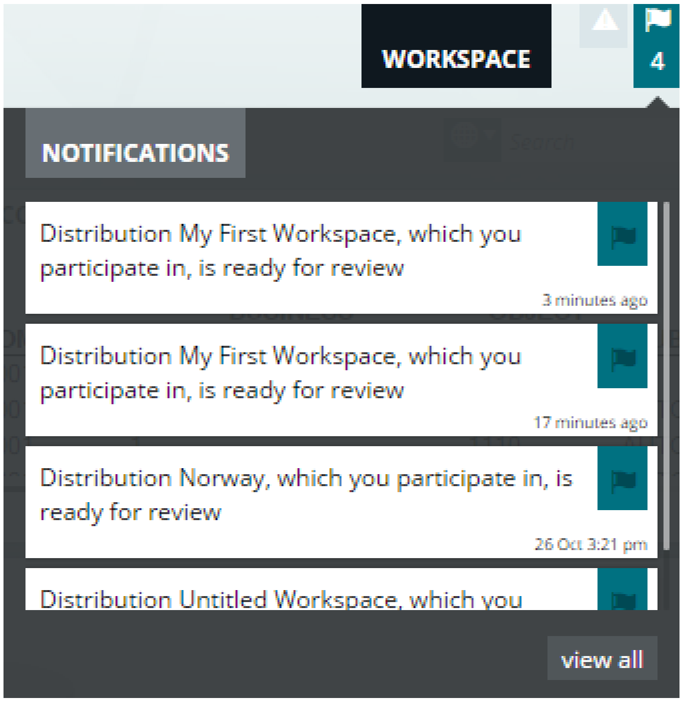
Click the **+add group** button again to add more groups. These should each have different filters for different groups of recipients.

To edit or remove a group, click on the three dots to the right of the group name and pick the required option:

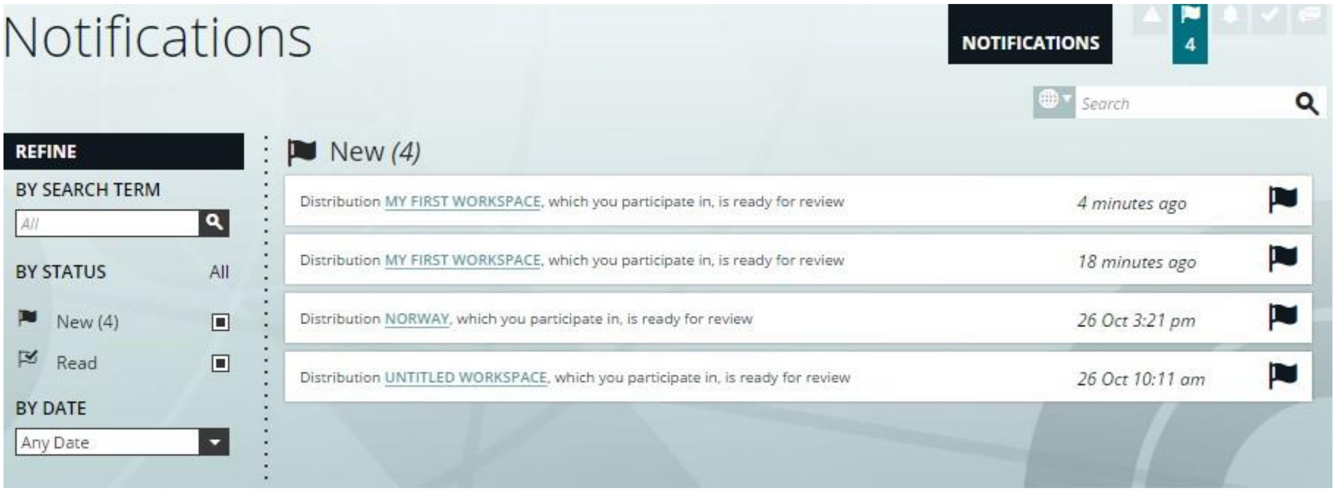


Notifications

The users selected to receive a distribution will receive an email when it is triggered. If they are Hubble Web users, they will also receive a notification in their 'in-tray'.



Clicking on **view all** will bring up the list of the user's Notifications, which can be searched by Name, Status and Date.



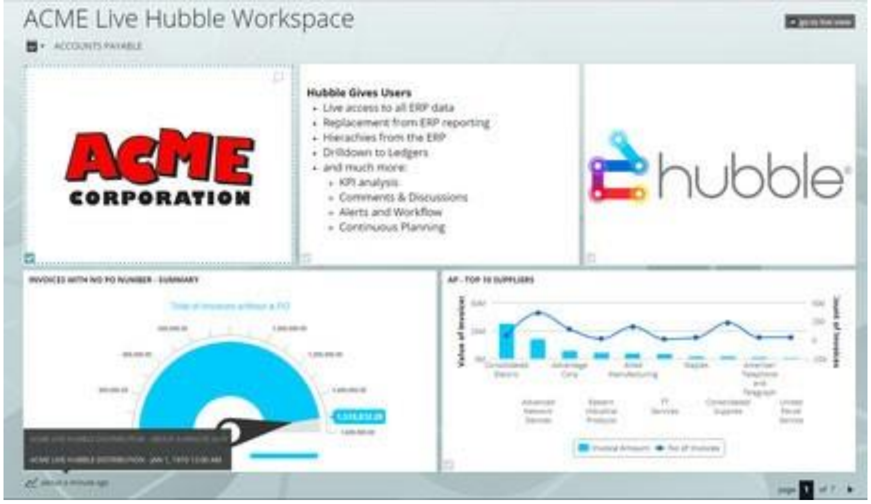
By clicking on the highlighted text, the user can view details of the distribution and access links to the content of the distribution, whether it is a PDF, an HTML snapshot, or a live view of a workspace. Clicking on the name a second time reverts to the single line format.

Email Notification

Both Hubble users recipients and email recipients will receive an email with a link to the distribution. For example:

HTML Format

Example:



The HTML format provides many of the features of a normal workspace:

- **Pages**: A table of contents and a page navigator allow quick and easy access to all distribution content.
- **Grids**: All data from the original report is saved and available to be scrolled in its entirety.
- **Views**: Pages containing multiple views allow each view to be resized or made full screen to help you focus on what's most important.
- **Legend manipulation**: Chart legends can have a segment disabled to show impacts on a chart.

In addition to viewing the current snapshot state, if you check **Allow recipients to view previous snapshots**, users will be able to view the snapshot states of any previous distributions as well (if there have been any).

Users that have a Hubble Viewer license will be able to click the **go to live view** button in the top right of the page to launch Hubble.

Note that the HTML format does not allow filters to be changed, data to be exported, or for the user to drill down to more detail.

Chapter 6: User Data Entry

Introduction

Viewer users, if given the permissions, can enter in budgeting/planning data into forms that a Power user has already created.

You can also enter and edit comments in any Comment columns that have been defined for reports.

- Entering comments or budgeting/planning data in Hubble Web is not supported on tablet or touch-screen devices.
- Entering comments or budgeting/planning data in Hubble Web is only possible in reports/list views containing less than 5000 rows.

Data Entry Shortcuts in Hubble Web

Support for the following keyboard shortcuts, which you may be familiar with from other software, is available in Hubble Web to making entering and editing data easier:

KEYBOARD COMBINATION	ACTION
Shift + Space	Select row.
Ctrl + Space	Select column.
F2	Start editing the current cell.
Ctrl + A	Select the entire grid contents.
Left/Right	Select the cell to the left/right of the selection.
Up/Down	Select the cell above/below the selection.
Shift + Left/Right	Extend the selection to include the next cell to the left/right of the selection.
Shift + Up/Down	Extend the selection to include the cell above/below of the selection.
Page Up/Down	Select the cell one page above or below the selection.
Shift + Page Up/Down	Extend the selection to include the cells one page above or below the selection.
Home/End	Move the selection to the first or last column.
Shift + Home/End	Extend the selection to include the first or last column.
Ctrl + Home/End	Move the selection to the first/last row and column.
Shift + Ctrl + Home/End	Extend the selection to include the first/last row and column.
Esc	Cancel current cell or row editing operations.
Tab	Move the selection to the next cell.
Shift +Tab	Move the selection to the previous cell.
Return\Enter	Exit editing mode and move the selection to the cell below the current one.
Shift + Return\Enter	Exit editing mode and move the selection to the cell above the current one.
Delete\Backspace	Clear the currently selected cells.
Ctrl + C, Ctrl + Insert	Copy the selection to the clipboard.
Ctrl + V, Shift + Insert	Paste the content of the clipboard into the selected area.

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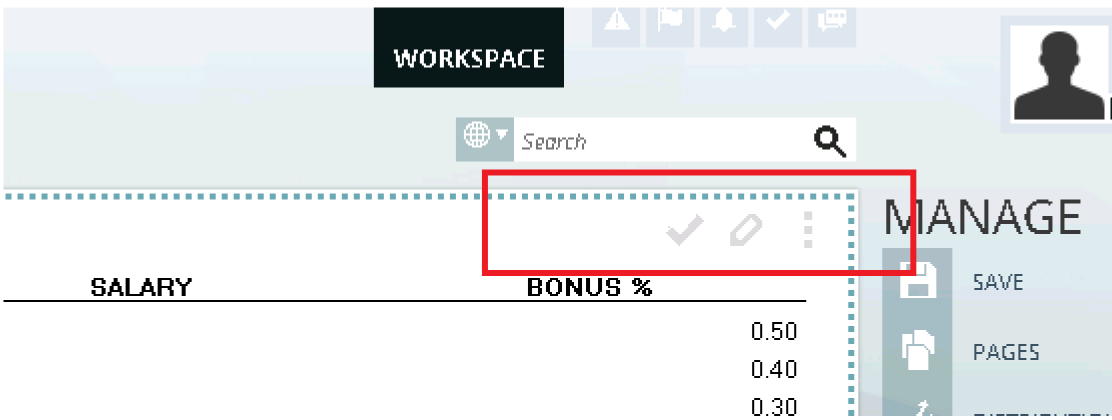
KEYBOARD COMBINATION	ACTION
Ctrl + X	Cut the selection to the clipboard.
Smart Pasting	Select a single cell and press Ctrl+C to copy its content, then extend the selection and press Ctrl+V to paste. The cell content will then be pasted over the entire selection.

Clipboard operations (cut, copy, paste, clear/delete) are supported for a maximum of 200 rows.

Entering Budgeting/Planning Data

In order to add and edit data in a budgeting form, use the buttons in the upper right corner of the view:



To start editing data in a form, click the pencil button to access data entry mode: .

The Refresh button for a workspace page will not refresh a grid which is in data entry mode.

Grid lines and piano lines are not shown in reports/list views when in data entry mode.

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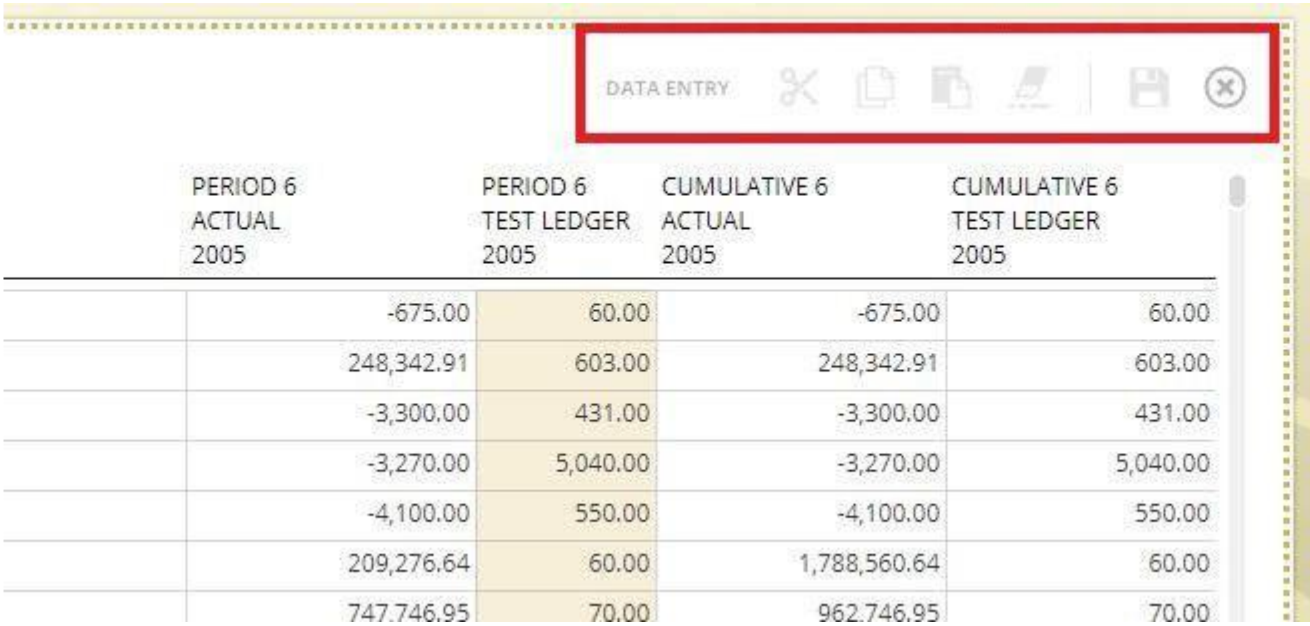
Data Entry Ribbon

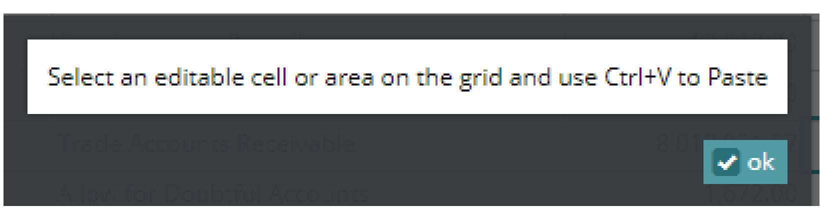
Once in Edit mode, the Budgeting ribbon is displayed and the data entry cells are highlighted.



	PERIOD 6 ACTUAL 2005	PERIOD 6 TEST LEDGER 2005	CUMULATIVE 6 ACTUAL 2005	CUMULATIVE 6 TEST LEDGER 2005
	-675.00	60.00	-675.00	60.00
	248,342.91	603.00	248,342.91	603.00
	-3,300.00	431.00	-3,300.00	431.00
	-3,270.00	5,040.00	-3,270.00	5,040.00
	-4,100.00	550.00	-4,100.00	550.00
	209,276.64	60.00	1,788,560.64	60.00
	747,746.95	70.00	962,746.95	70.00

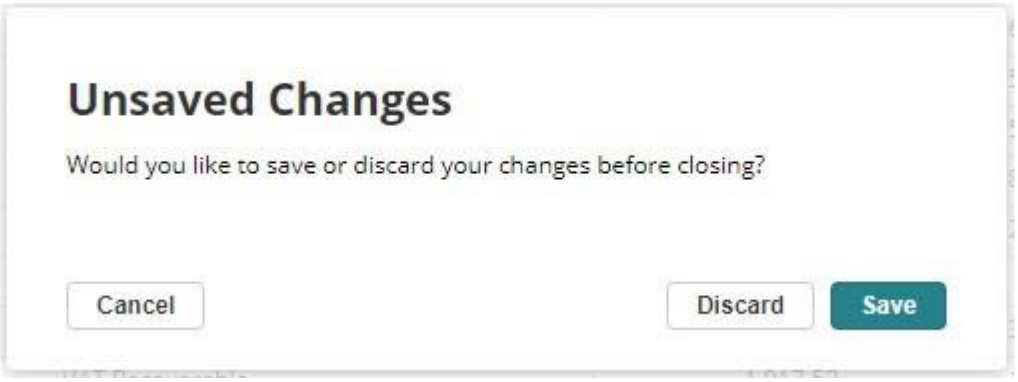
Budget menu buttons can be used to perform the editing functions as indicated by the text on the buttons:

- **Cut:** when a cell is selected in a data entry column, the **Cut** button becomes enabled. It enables you to move its content to another cell in combination with the **Paste** button. If no cell is selected it is disabled.
- **Copy**: when a cell is selected in a column, the **Copy** button becomes enabled. It enables you to copy its content. If no cell is selected it is disabled. You can copy content from cells in any columns, including Label, Value and Comment columns.
- **Paste**: when a cell is selected in a data entry column, the **Paste** button becomes enabled. You can only paste into a range of cells, but they must be in data entry columns. When you click **Paste** you will be presented with the following dialog:



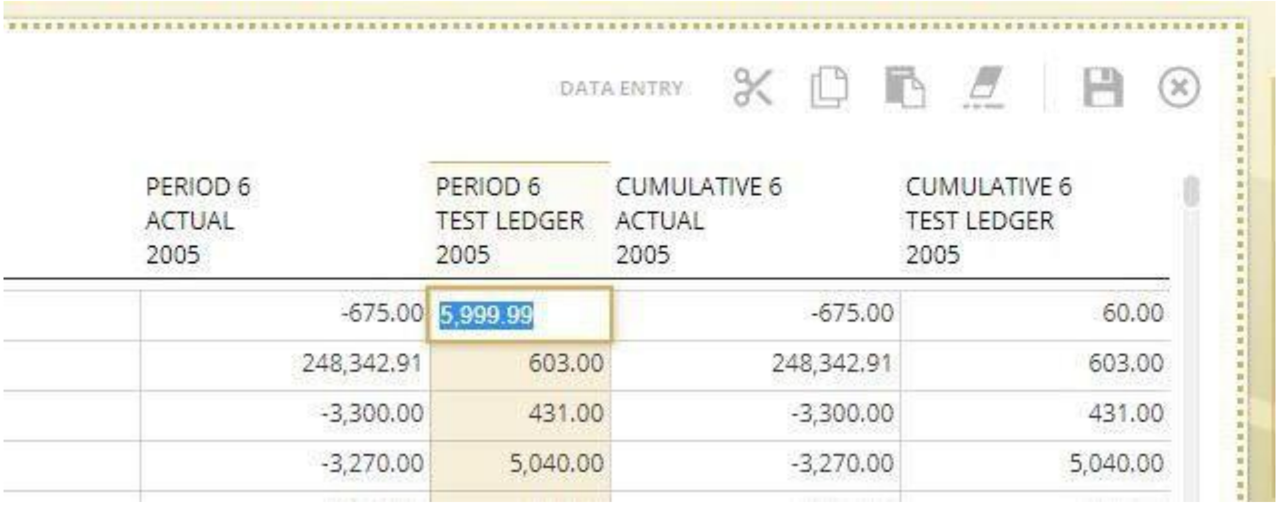
A standard security precaution in web browsers blocks web applications from access to the system clipboard, in which case you should use the Ctrl-V keyboard shortcut to perform pastes.

- **Clear**: when a cell is selected in a data entry column, the **Clear** button becomes enabled. It clears the content of selected cells when pressed.
- **Save**: once you enter, edit, or clear data in data entry column cells, the **Save** button becomes enabled. This saves the changes you have made to the Comment column.
    - **Close**: when you enter Edit mode the **Close** button is enabled. If there are no unsaved changes, it exits Edit mode when pressed. If there are unsaved changes, the following message is displayed.



Entering Data into Cells

When a form is in data entry mode, data in cells highlighted with a darker background can be edited. For example:

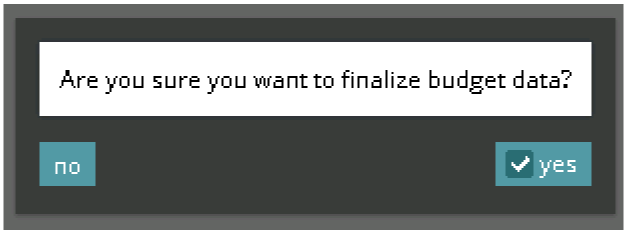


Data entry on the web works as stated above for budgeting forms with Time series, Selectors, Hierarchy and Cycle or the participant's scope.

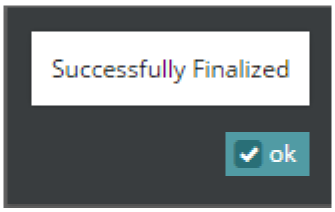
Entries you make into cells will be validated in the same way as in desktop budgeting.

Finalizing the Cycle

Once data entry is complete, you can finalize the cycle by clicking the tick button: . Entries you make into cells will be validated in the same way as in desktop budgeting.



Click **yes** to continue.The following message will then be displayed:



If you need to make a change after finalizing, the status must be reset. This is done using the **Cycle Status** dialog of the desktop budgeting facilities by selecting the cycle and then clicking **Status Override**.

Entering Comments

Permissions/Advanced Capabilities Required

The ability to view, add, edit, delete etc. comments is governed by **Permissions** and **Advanced Capabilities** in Administrator.

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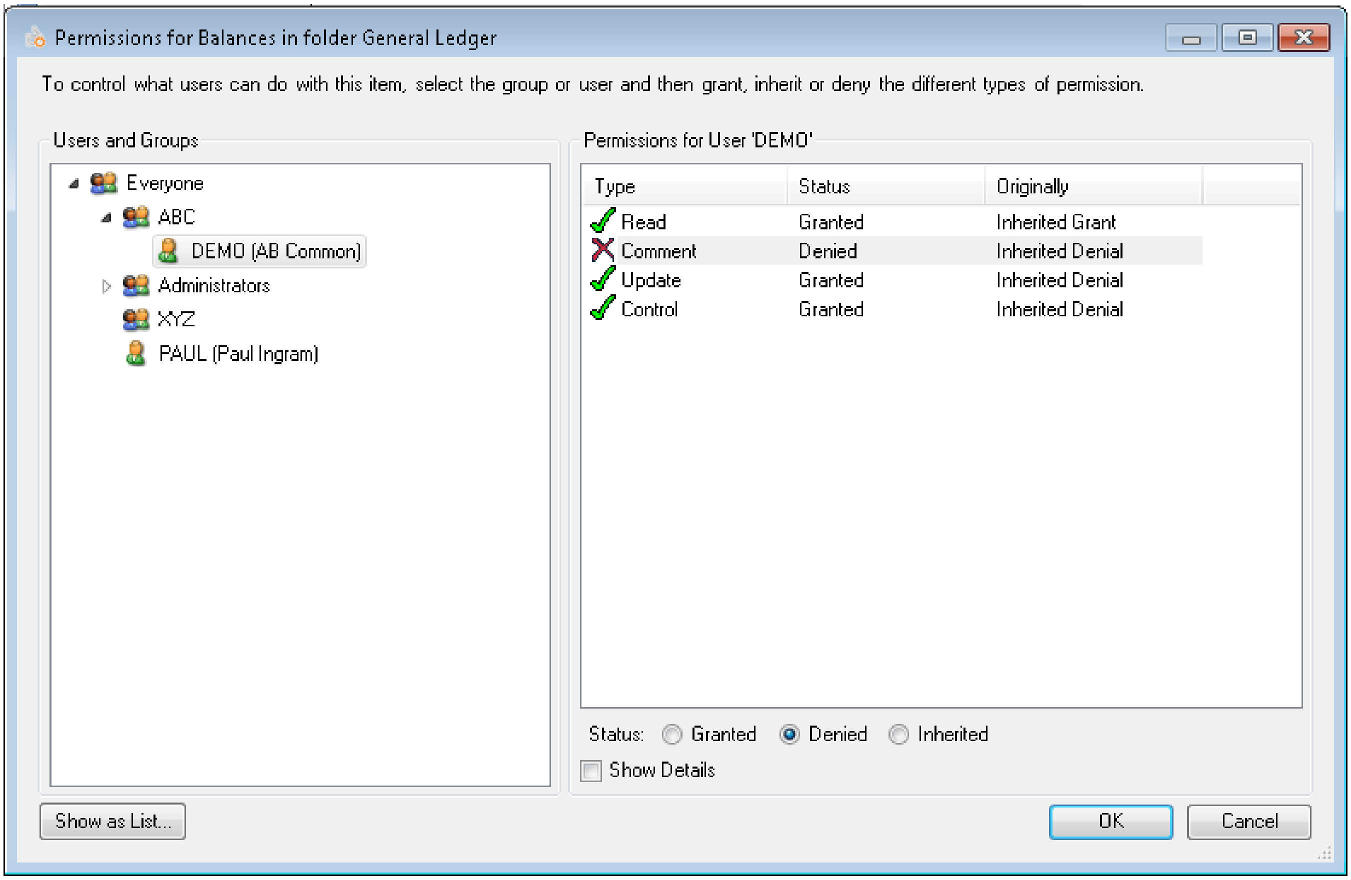
For each user, a permission setting determines whether or not users can enter etc. comments on specific reports; it is set on a report-by-report basis. The *Comment* permission must be granted for the report.



The *Comment* permission is overridden, however, by the *Comment Entry Capability*. The *Comment Entry* capability determines whether or not a user can enter etc. comments for *all* reports. This is set in Advanced Capabilities: Feature Control.

There is a separate capability that determines whether or not comments can be entered while in Budgeting mode, regardless of whether the aforementioned capability, *Comment Entry*, is granted. The capability that must be set to allow comments to be set in Budgeting mode is in Hubble Administrator, in Advanced Capabilities: Hubble Inquiry Settings > Commenting in Budgeting Mode, and is called *Commenting in Budgeting Mode*.

Comments and Budgeting

The button used to enter data entry mode for comments is the same one used to enter data entry mode for budgeting and planning.

The Refresh button for a workspace page will not refresh a grid which is in data entry mode.

Grid lines and piano lines are not shown in reports/list views when in data entry mode.

If a GL Balances report contains both comment columns and is defined as a form in the Financial Budgeting system, then you can enter comments and budgeting data at the same time.

If the report is defined as a form in the Strategic Planning system and contains comment columns, then any new row you insert must be saved before you can enter a comment in a comment column on that row.

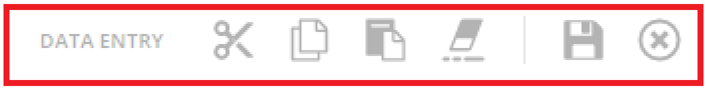
An extra **Insert Row** button will show for planning reports or when a budgeting form has line item detail, account currency or subledger columns.

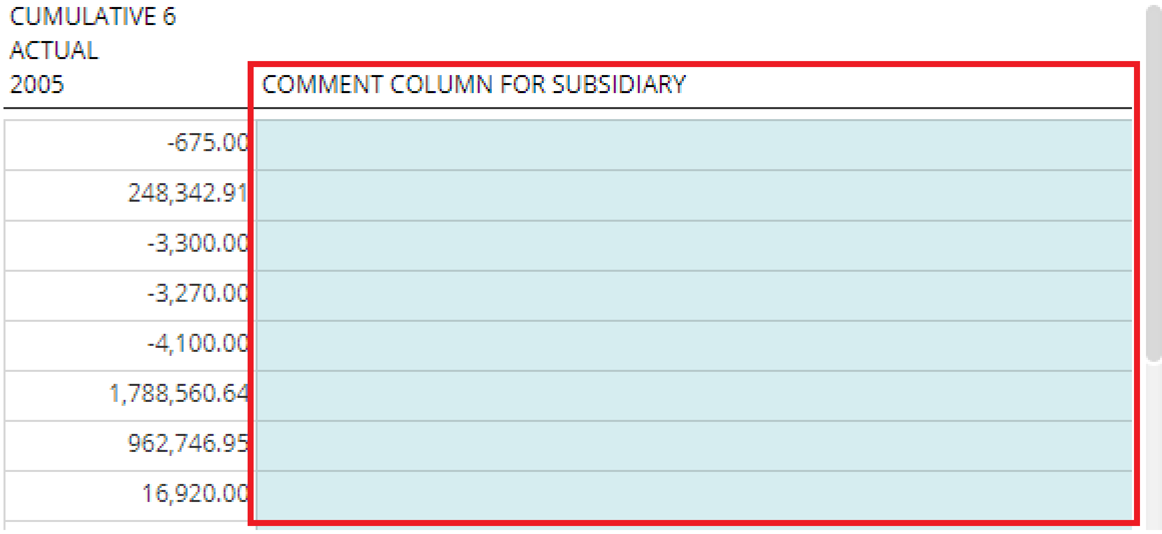
Data Entry in Comment Columns

1. Open a Report that has Comment columns defined for it (see above).
2. Enter Commenting mode:

OBJECT ACCOUNT	SUBSIDIARY	ACCOUNT DESCRIPTION	COMMENT
05		Petty Cash	
10	AUTOBKST	Auto Bank Statement Bank	
10	AUTOBST1	Auto Bank Statement 1	
10	AUTOBST2	Auto Bank Statement2	
10	AUTOBST3	Auto Bank Statement3	
10	BEAR	Bear Creek National Bank	
10	FIB	First Interstate Bank	
10	FRANCE	First Bank of Paris	

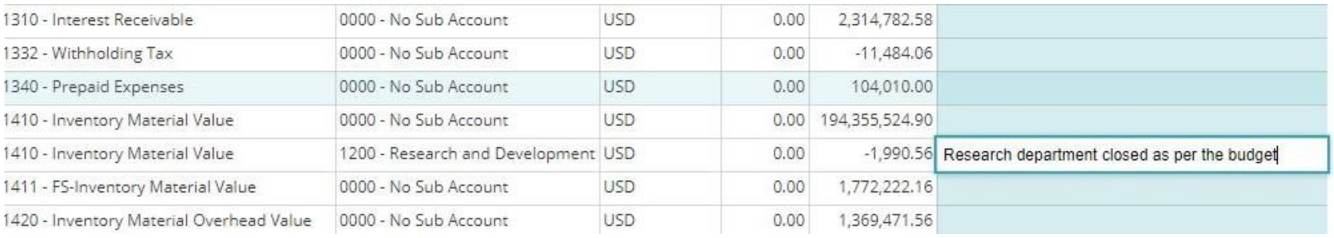
3. A toolbar is then displayed on the top-right corner of the report, and Comment columns will be highlighted:





CUMULATIVE 6 ACTUAL 2005	COMMENT COLUMN FOR SUBSIDIARY
-675.00	
248,342.91	
-3,300.00	
-3,270.00	
-4,100.00	
1,788,560.64	
962,746.95	
16,920.00	

4. To add to or edit the content of a Comment column cell, simply enter the text into the cell in question.



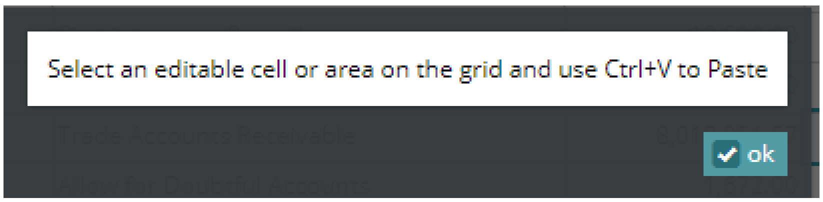
1310 - Interest Receivable	0000 - No Sub Account	USD	0.00	2,314,782.58	
1332 - Withholding Tax	0000 - No Sub Account	USD	0.00	-11,484.06	
1340 - Prepaid Expenses	0000 - No Sub Account	USD	0.00	104,010.00	
1410 - Inventory Material Value	0000 - No Sub Account	USD	0.00	194,355,524.90	
1410 - Inventory Material Value	1200 - Research and Development	USD	0.00	-1,990.56	Research department closed as per the budget
1411 - FS-Inventory Material Value	0000 - No Sub Account	USD	0.00	1,772,222.16	
1420 - Inventory Material Overhead Value	0000 - No Sub Account	USD	0.00	1,369,471.56	

You can use the keyboard shortcuts (see **Data Entry Shortcuts in Hubble Web**) and toolbar buttons (see below) to help you do this,

5. The toolbar consists of the following buttons:

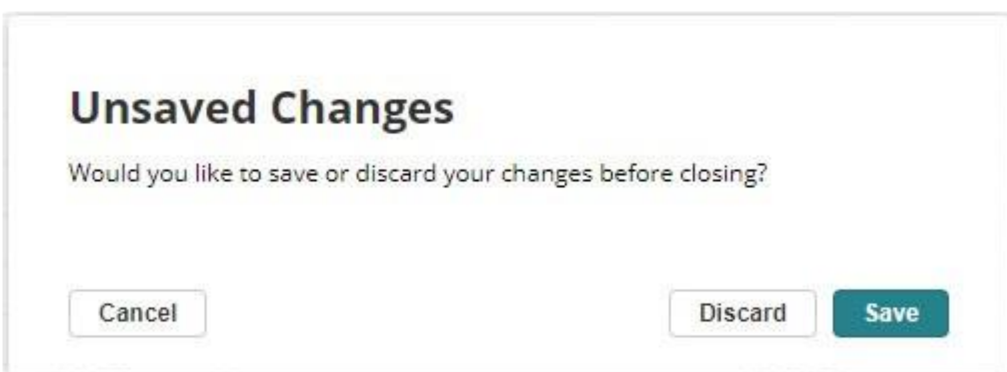
   - **Cut:** when a cell is selected in a Comment column, the **Cut** button becomes enabled. It enables you to move its content to another cell in combination with the **Paste** button. If no cell is selected it is disabled. You can copy content from cells in any columns, including Label, Value and Comment columns.

- **Copy**: when a cell is selected in a Comment column, the **Copy** button becomes enabled. It enables you to copy its content. If no cell is selected it is disabled. You can copy content from cells in any columns, including Label, Value and Comment columns.
- **Paste**: when a cell is selected in a Comment column, the **Paste** button becomes enabled. You can only paste into a range of cells, but they must be in Comment Columns. When you click **Paste** you will be presented with the following dialog:



A standard security precaution in web browsers blocks web applications from access to the system clipboard, in which case you should use the Ctrl-V keyboard shortcut to perform pastes.

- **Clear**: when a cell is selected in a Comment column, the **Clear** button becomes enabled. It clears the content of selected cells when pressed.
- **Save**: once you enter, edit, or clear data in Comment column cells, the **Save** button becomes enabled. This saves the changes you have made to the Comment column.
- **Close**: when you enter Commenting mode the **Close** button is enabled. If there are no unsaved changes, it exits Commenting mode when pressed. If there are unsaved changes, the following message is displayed.



- Note that if the comment column and report are defined such that the same comment applies to more than one row (e.g. for the same customer, or same business unit, etc), then when you click

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Save that this will be reflected in the report, i.e. the change will be applied to all the rows in question:

DATA ENTRY Save

BUSINESS UNIT	OBJECT ACCOUNT	COMMENT ASSOCIATED WITH OBJECT ACCOUNT	SUBSIDIARY	ACCOUNT DESCRIPTION	PERIOD 6 ACTUAL 2005	CUMU ACTU 2005
1	1105			Petty Cash	-675.00	
1	1110	comments	AUTOBKST	Auto Bank Statement Bank	248,342.91	2
1	1110		AUTOBST1	Auto Bank Statement 1	-3,300.00	
1	1110		AUTOBST2	Auto Bank Statement2	-3,270.00	
1	1110		AUTOBST3	Auto Bank Statement3	-4,100.00	
1	1110		BEAR	Bear Creek National Bank	209,276.64	1,7
1	1110		FIB	First Interstate Bank	747,746.95	9
1	1110		FRANCE	First Bank of Paris	16,920.00	

BUSINESS UNIT	OBJECT ACCOUNT	COMMENT ASSOCIATED WITH OBJECT ACCOUNT	SUBSIDIARY
1	1105		
1	1110	comments	AUTOBKST
1	1110	comments	AUTOBST1
1	1110	comments	AUTOBST2
1	1110	comments	AUTOBST3
1	1110	comments	BEAR
1	1110	comments	FIB
1	1110	comments	FRANCE

Financial Planning on the Web

Financial Planning data can be entered on the web.

Please refer to the User Guide for Budgeting Planning for more detailed information.