

Plan Analysis

The Plan Analysis section explains how users can analyse campaign performance and financial data using pivot-style reports. It covers how to create, customise, save, and modify pivot layouts, allowing users to view plan data across multiple dimensions and export insights into Excel for further analysis.

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Creating and Modifying Pivot Reports

Accessing Plan Analysis

To create or manage pivot layouts, a user can either:

1. Navigate to **Plans** from the left-hand menu and select **Plan Analysis**, or
2. Navigate directly to the **Analysis** tab within an open plan or schedule.

Creating a New Pivot Report

To create a new pivot report:

1. Select **Load Report** to initialise the report.
2. Right-click anywhere within the report area and select **Show Field Chooser**.

The Field Chooser allows the user to select which data fields are displayed in the report.

Using the Field Chooser

Once the Field Chooser is visible:

1. Fields can be added by ticking the relevant checkboxes, or
2. Fields can be dragged and dropped into the **Rows**, **Columns**, or **Values** areas.
3. Select **OK** to apply the selected fields to the report.

The chosen fields will now appear in the pivot report and can be repositioned by dragging and dropping them into the desired order or section.

Saving a Pivot Layout

Once the report structure is finalised:

1. Select **Create New**.
2. Enter a **Title** and **Description** for the layout.
3. Select **Proceed** to save.

If the **Default Layout** checkbox is selected, this layout will automatically be applied when generating new reports.

Pivot totals can also be enabled to display aggregate values within the report.

Modifying Existing Pivot Layouts

Existing pivot layouts can be amended to create variations:

1. Select the **Pivot Layouts** drop-down menu.
2. Choose **Modify**.
3. Update the title, description, and selected data fields as required.
4. Select **Update** to save the modified layout.

The updated layout will now be available for use in Plan Analysis reporting.