

Volume

2

INTERACTIVE REPORTING

SALES ANALYSIS AND REPORTING PRODUCTS

INTERACTIVE REPORTING

Users' Manual Version 3.0

INTERACTIVE REPORTING

Interactive Reporting User's Guide

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Sales Results - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Analyze By: Sales Rep: All | Sales By Month: All | Order By: Name Asc | Group By: (No grouping) | Display: All (V)

Wizard Advanced Lock Favourites Save Print Export +/- Cols Table Horz Bar Stacked Stacked % Vert Bar Stacked Stacked % Line

Reports → Northwind - Demo → Sales Rep v. Month

Sales Date: 01/01/2006--31/12/2006

Display: Total Sales, Profit, Margin%

	Jan 2006	Feb 2006	Mar 2006	Apr 2006	May 2006	Jun 2006	Jul 2006	Aug 2006	Sep 2006
5 Buchanan	€0	€0	€2,634.40 -€47.25 -1.79%	€0	€5,127.50 €882.00 17.20%	€3,124.90 €684.40 21.90%	€6,475.40 €2,042.90 31.55%	€3,636.70 €802.70 22.07%	€2,091.70 €570.50 27.27%
8 Callahan	€6,701.10 €1,436.90 21.44%	€7,764.40 €1,352.15 17.41%	€4,806.10 €11.40 0.24%	€800.50 €199.80 24.96%	€4,792.60 €1,251.80 26.12%	€2,616.05 €560.35 21.42%	€3,984.10 €1,330.60 33.40%	€4,756.50 €1,393.00 29.29%	€2,891.40 €986.40 34.11%
1 Davolio	€7,331.60 €1,218.00 16.61%	€2,504.60 €554.00 22.12%	€5,493.90 €564.55 10.28%	€240.00 €64.00 26.67%	€9,168.25 €2,254.15 24.59%	€6,112.65 €1,255.90 20.55%	€19,997.88 €5,553.88 27.77%	€5,119.10 €1,743.75 34.06%	€8,461.50 €2,229.60 26.35%
9 Dodsworth	€1,208.50 €210.00 17.38%	€0	€1,770.80 €359.30 20.29%	€611.00 €273.00 44.68%	€139.80 €37.80 27.04%	€3,761.50 €955.00 25.39%	€28.00 €10.00 35.71%	€1,928.00 €654.25 33.93%	€10,412.40 €3,838.60 36.87%
2 Fuller	€3,150.20 €403.10 12.80%	€1,584.00 -€180.00 -11.36%	€2,905.10 €522.20 17.98%	€14,019.30 €4,386.30 31.29%	€4,589.60 €1,193.60 26.01%	€7,058.60 €1,567.60 22.21%	€10,320.00 €3,250.50 31.50%	€57.50 €20.00 34.78%	€9,622.25 €2,969.85 30.86%
7 King	€13,703.40 €274.60 2.00%	€3,891.00 -€145.50 -3.74%	€3,867.20 -€21.30 -0.55%	€5,707.35 €1,146.05 20.08%	€6,041.25 €2,363.95 39.13%	€2,082.00 €792.50 38.06%	€6,144.60 €1,691.60 27.53%	€7,853.05 €2,387.25 30.40%	€13,839.29 €4,130.89 29.85%
3 Leverling	€7,477.90 €1,355.50 18.13%	€10,581.30 €1,634.60 15.45%	€11,599.40 €222.90 1.92%	€10,297.35 €2,929.35 28.45%	€18,639.80 €5,344.45 28.67%	€5,871.60 €1,589.70 27.07%	€1,109.15 €551.15 49.69%	€5,881.80 €1,406.60 23.91%	€3,595.50 €965.00 26.84%
4 Peacock	€25,620.10 €1,727.15	€13,530.30 €2,918.60	€5,644.80 €582.30	€14,333.15 €3,685.65	€7,573.20 €1,831.70	€4,232.40 €1,225.40	€6,104.80 €1,729.20	€16,766.79 €5,109.24	€8,147.63 €2,624.78

45

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Overview

What All the Excitement is About ...

Making the right decisions based on the best information obtainable is critical to the survival of every enterprise. **INTERACTIVE REPORTING** is a revolutionary new and powerful set of tools, designed to enable managers obtain the best data to support their business decisions. **INTERACTIVE REPORTING** applications can generate versatile data reports covering all your company's activities and can be readily exported into other systems.

This manual documents how to get started with **INTERACTIVE REPORTING** and produce precision targeted sales reports within minutes.

The software outlined in this manual will enable you to select the data you want to see and the format in which you want to see it presented. You will be able to drill down into your organisation's data to review all aspects of performance; make comparisons; generate detailed visual displays and reports; compare fields, dates, costs, margins and much, much more.

INTERACTIVE REPORTING Version 3.0 has been designed to provide managers with the versatility to look at their organisation's performance in new ways, enabling them to make the absolutely best informed decisions at all times. Whether you want to interpret your sales, stocks, costs, margins, revenues, staff performances or trends, **INTERACTIVE REPORTING** will enable you to make direct and instant comparisons using up to five separate fields which you can select by day, week, month, quarter or year and compare with any period you choose, enabling you to instantly identify every possible trend effecting your organisation's performance.

The following pages will show you how to select, filter, display, report and drill into your organisation's data. We think you will find it surprisingly easy to use, and surprisingly helpful in running your business in the future.

John Sullivan
CEO INTERACTIVE REPORTING

Getting started

Your Journey Begins...

To start using INTERACTIVE REPORTING, you'll need to have a **Login-ID** and **Password** assigned to you by your system administrator. These will give you access to INTERACTIVE REPORTING and the sales data appropriate to your needs.

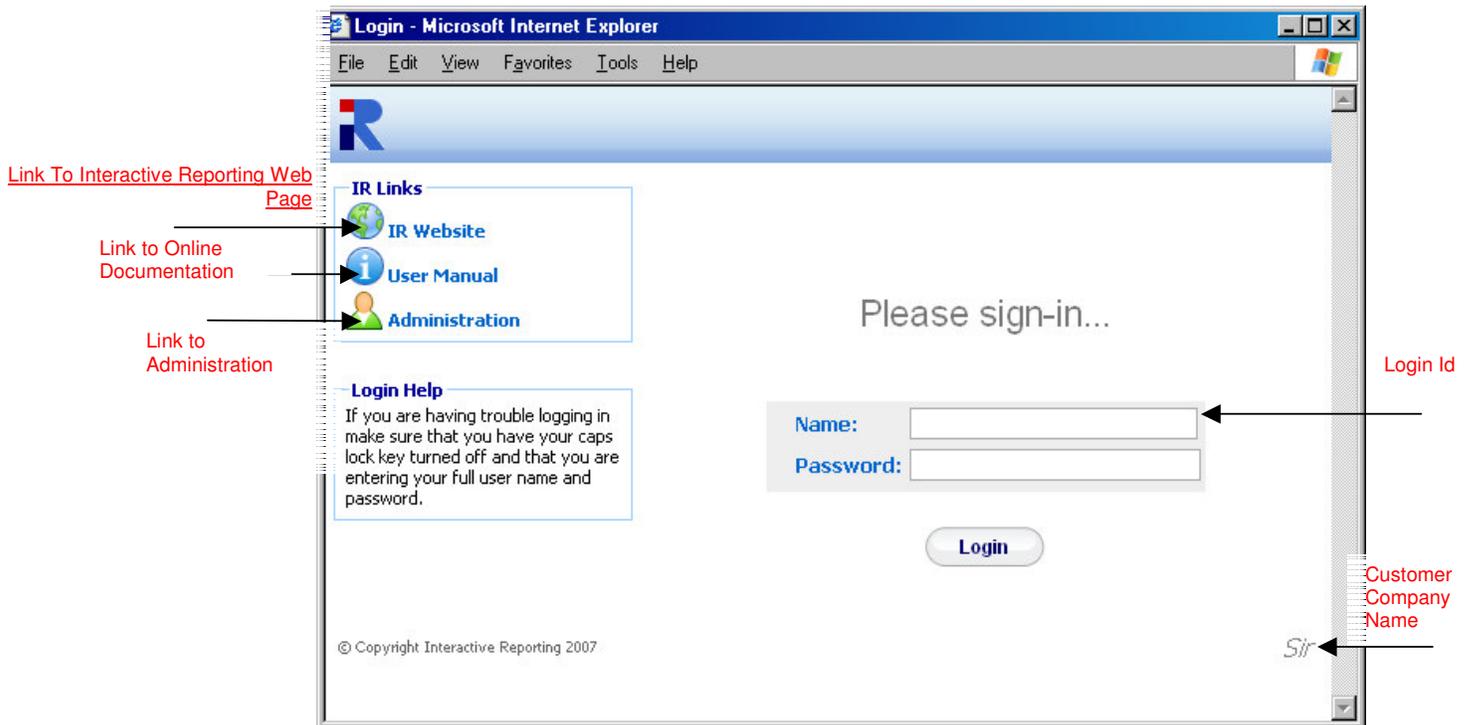


Figure 1

Simply fire-up your favourite web browser (i.e. Explorer, Firefox etc) and navigate to the **INTERACTIVE REPORTING Login-Screen** (your system administrator will give you the URL web address).

Enter the **login-name** and **password** that your system administrator has given you, and click **'Login'** (in the above example, user *jbloggs* is signing-in).¹

Once you have signed-in, you will be taken straight to one of two screens. If you have more than one report available you will be directed to the **'Choose Report'** page, otherwise you will be directed straight to the **'Report Type'** page.

The Company name will be seen on the bottom right corner of the page. This will be present at the same position in every page of **INTERACTIVE REPORTING**.

1.1 Choose Report

In the **'Choose Report'** section there is a list of Reports for the user to select from. Each Report has two links associated with it. This first is the Report Name that will direct the user to the wizard pages to generate less complex reports. The second link is the **'Advanced'** text, which will direct the user to the advanced report generation page. This step is intended for users who are quite familiar with **INTERACTIVE REPORTING** and computer systems.

This page may be re-accessed at any stage however by clicking the **'Choose Report'** link on the task bar under the 'Report Tasks' heading, see Figure 5, or by following the 'Reports' link in the 'breadcrumbs' sequence (that's the sequence of text that runs from left to right across the screen: e.g. **Reports** → **Northwind - Demo** → **Sales Rep by Item** at the top of each report).

¹ [Please note that for the remainder of this Manual our examples will be drawn from an enhanced version of the Microsoft's Northwind Traders sample database.]

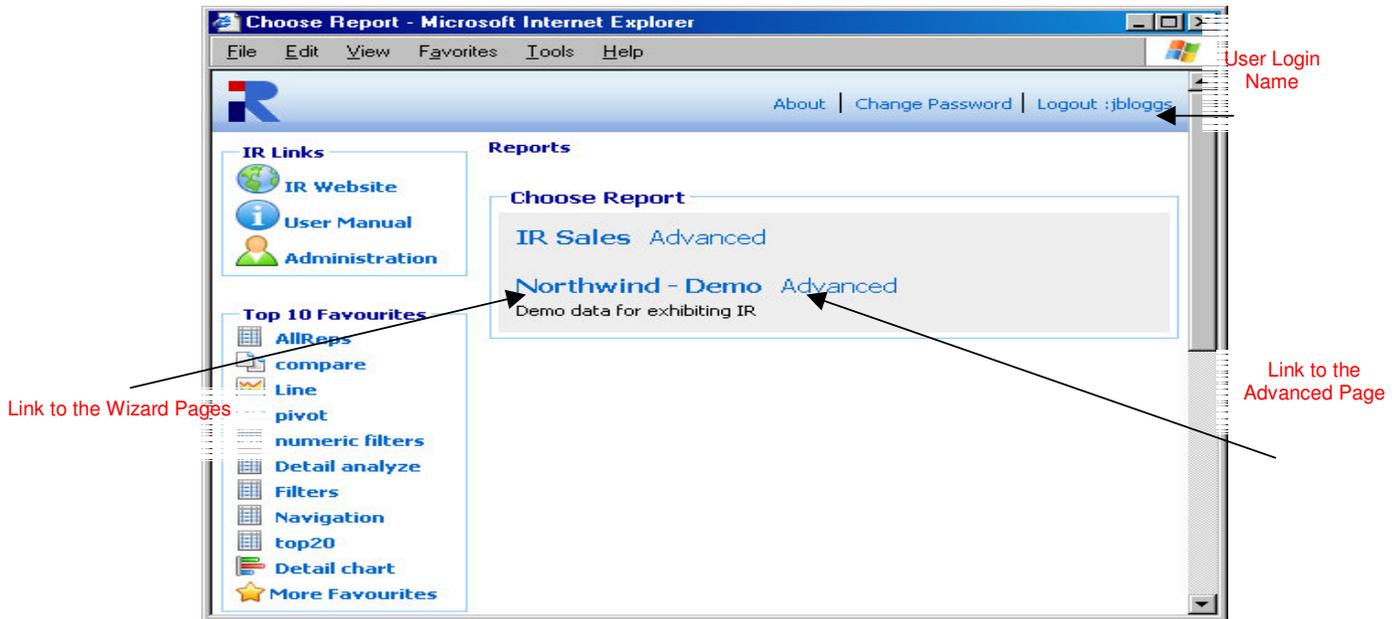


Figure 2

1.2 Logout

The 'Logout' link logs out the current user, whose user name is shown after the semi-colon. In Figure 2 the user's name is *jbloggs*, as can be seen in the top left corner. Once the logout link is pressed the user is directed to the main login screen.

1.3 About

When the 'About' link is pressed a popup box appears. This contains two pieces of information, the version of the current Interactive Reporting and the date at which this version was created.

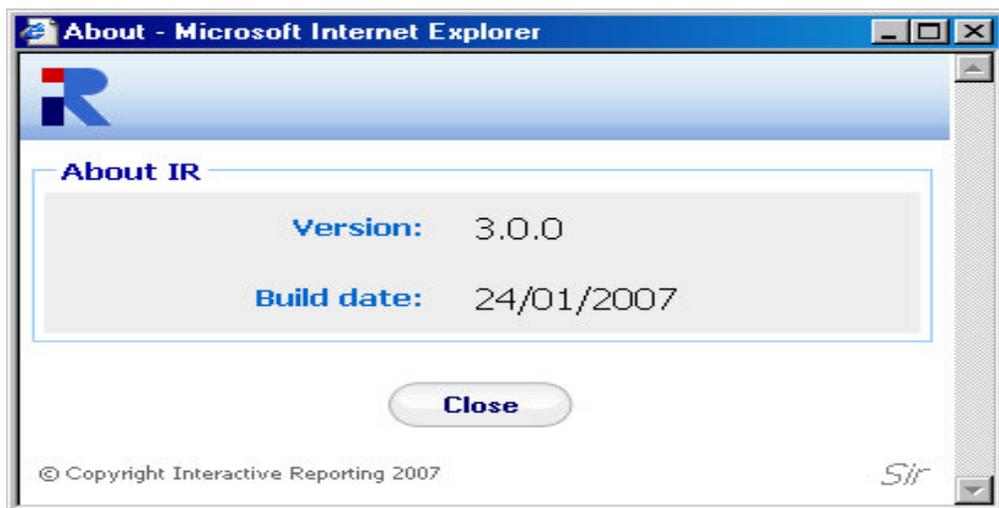
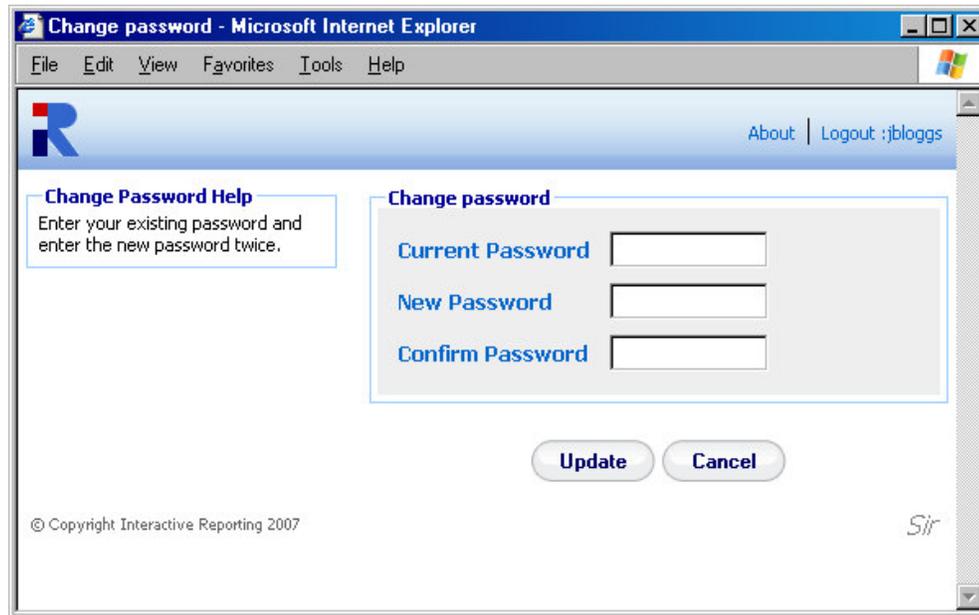


Figure 3

1.4 Change Password

INTERACTIVE REPORTING provides the facility for a user to change their password without having to contact the System Administrator. To change a password the user must click on the **'Change Password'** link at the top of the page. The user will be then directed to the screen of Figure 4. To change Password, type the current password into the **'Current Password'** box and the new password into the other two boxes. Then press **'Update'**. If the password is incorrect a message will appear with details about which part of the process was not performed properly. Once the procedure has been completed correctly the user is returned to the **'Choose Report'** page, if a selection of reports is available. Otherwise, they are returned to the **'Report Type'** Page.



The screenshot shows a web browser window titled "Change password - Microsoft Internet Explorer". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page header features a large blue "R" logo on the left and "About | Logout ;jbloggs" on the right. The main content area is divided into two sections. On the left, a "Change Password Help" box contains the text: "Enter your existing password and enter the new password twice." On the right, the "Change password" form has three input fields labeled "Current Password", "New Password", and "Confirm Password". Below these fields are two buttons: "Update" and "Cancel". At the bottom left of the page, there is a copyright notice: "© Copyright Interactive Reporting 2007". At the bottom right, the word "Sir" is displayed in a stylized font.

Figure 4

1.5 Top 10 Favourites

The **'Top 10 Favourites'** task bar at the left side of the Reports list allows the user to view directly one of the 10 most popular previously saved reports. More favourites can be viewed by clicking the **'More Favourites'** link at the bottom of the task bar. This task bar is also available at the wizard and advanced report pages.

Generating Wizard Reports

Putting Interactive Reporting to Work...

INTERACTIVE REPORTING provides a simple and easy-to-use *Wizard* interface to access your company's data. It provides a point-and-click means of specifying the sales data you wish to analyse.

2.1 Report Type

The '**Report Type**' page allows the user to choose from one of six options in generating a report.

- **Standard Report**
- **Chart Report**
- **Pivot Report**
- **Comparison Report**
- **Advanced Reporting**
- **View Favourites**

The first four options use the wizard interface to generate reports. The fifth option, '**Advanced Reporting**', directs the user to the advanced reporting interface to generate their report. The final option, **View Favourites**, allows the user to view a list of predefined reports.

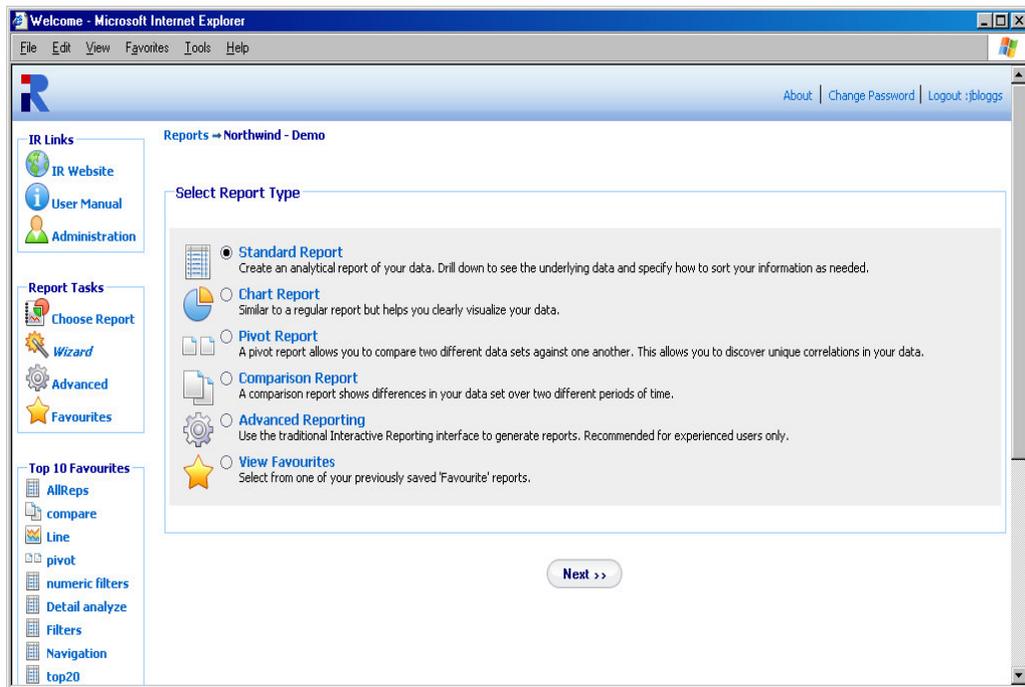


Figure 5

2.2 Standard Report

When the **'Standard Report'** option is selected and the **'Next'** button clicked the user is directed to the **'Choose Analysis Report Parameters'** page. As can be seen from Figure 6, a number of options must be selected at this time.

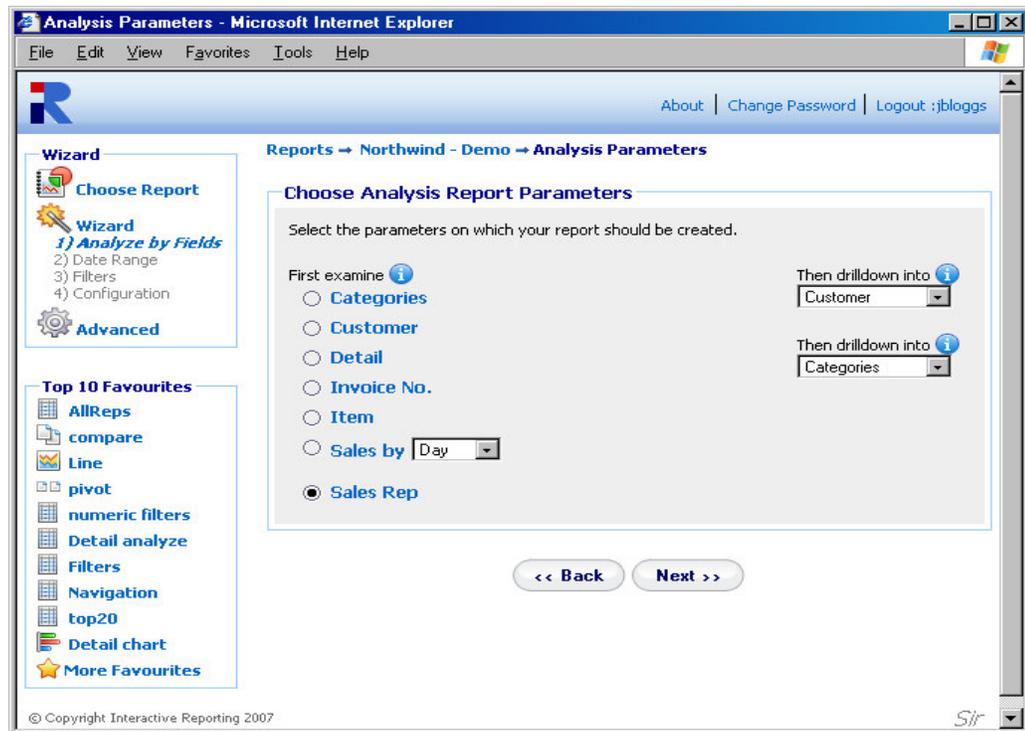


Figure 6

The first option to select is the list on the left side of the screen under the **'First Examine'** title. This is the value upon which the first level of data is shown when the report is generated. In the above example of Figure 6 the *Sales Rep* has been chosen. This will result in a report on *Sales Rep* data being generated.

The next options to select correspond to the deeper levels of the report. These can be seen on the right side of the page under the heading **'Then drilldown into'**. There will be a list of these dropdown boxes to select from, their level within the report being reflected by their position from the top of the page. In the above example the second Level option is set to *Customer* and the third level option is set to *Categories*. When the report is generated the data presented will be for *Sales Rep*. When a specific Sales Rep is selected, say *Davolio*, the data generated will be the customers specific to this Sales Rep. When a specific customer is then selected, such as *Ernst Handel*, the data generated for the next level of the report will be the data for the categories supported by the customer *Ernst Handel* whose sales rep is *Davolio*. The customer may have other sales reps but their information will not be included in the report.

2.3 Choosing the Date Range

The next step in the wizard report generation is to choose the Date Range from which the data will be extracted. Interactive Reporting provides a number of predetermined date ranges that may be chosen from the drop down menu of **'Date Range'**. These include: *Last Year*, *YTD (Year to Date)*, *Last Quarter*, *Yesterday* and many more. If the

user would prefer to enter their own specific date range then there are two options available to them. The first is to type the initial and final dates into the **'Start Sales Date'** and **'End Sales Date'** fields, respectively. The second option is to click on the calendar next to the date box and select the dates from there.

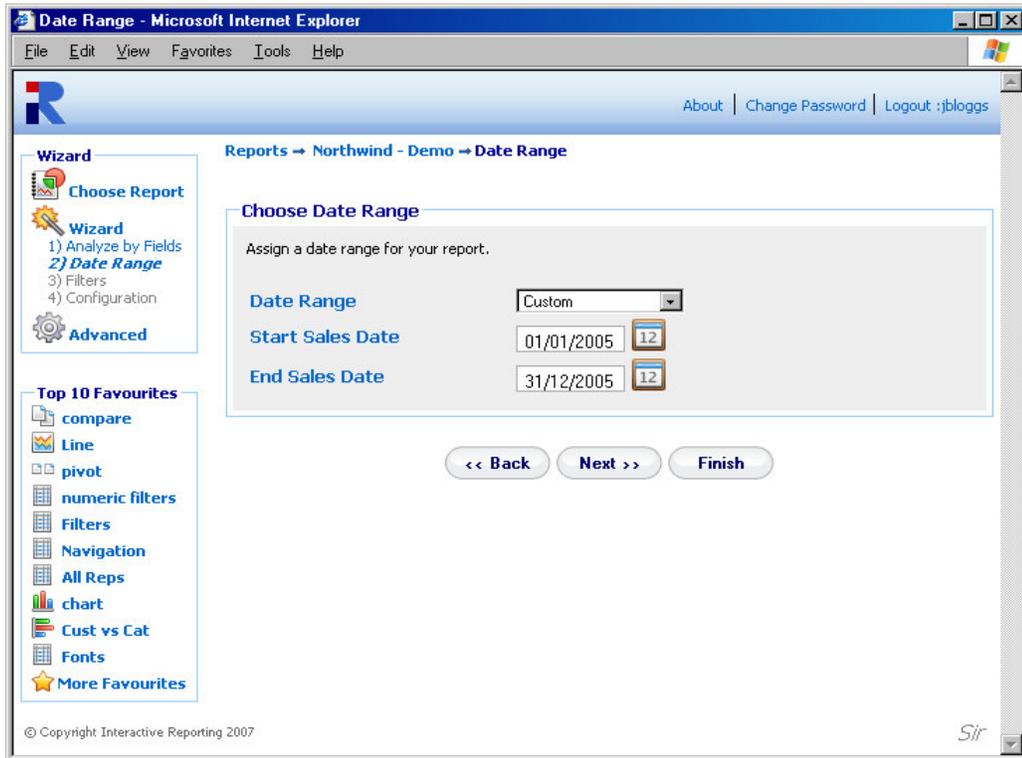


Figure 7

From this point the user may generate the report by clicking the **'Finish'** button. However, if the user wishes to place more restrictions on the data they wish to view they should click on the **'Next'** button. If the user wishes to make amendments to some of the settings they have already chosen, this may be achieved by pressing the **'Back'** button.

2.4 Filtering Data

In Figure 8 the three main types of data selection boxes can be seen: the **multi-select combo box**, the **single-select combo box** and the **text box**. The **Item** filter is a multi-select combo box, which allows the user to select multiple items from the scrollable item list. To select multiple filter values hold down the *CTRL* key when making the selections.

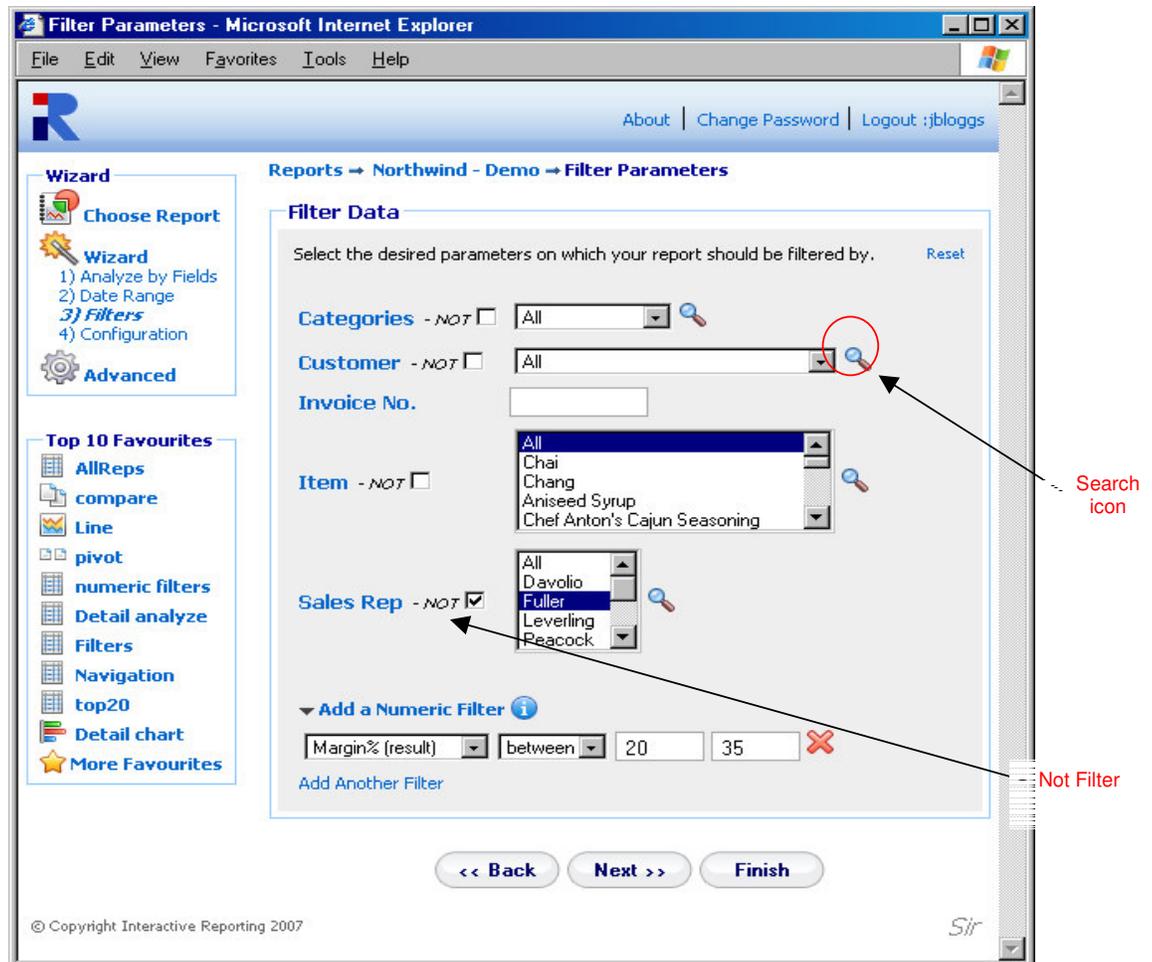


Figure 8

The second option available is the single select combo-box. An example of this is the **Customer** dropdown list. Only one filter value (i.e. how you choose to select or *'Filter'* the data) may be selected from this list at a time. The final option is the text box, e.g. the **Invoice No.** Filter. To make a selection from this option simply type the filter value of request into the text box. If this box is left blank then all the values of this field will be included in the report.

2.5 Not Filter

The **'Not Filter'** allows the user to conduct an analysis excluding specific elements of a filter. In Figure 8 we can see that Sales Rep *Fuller* will be excluded from any report generated.

2.6 Search

Another method for selecting which data to place in the report is to click on the **Magnifying Glass** next to the filter types, or **'Search Icon'**, as can be seen in Figure 8. Then a new window appears shown on Figure 9. In this example the search box for the *Item* is shown. As *Item* is a multi-select box the **'>>'** and **'<<'** buttons are present, in addition to the single selection **'>'** and **'<'** ones, which allow for multi selections and removals. To select a filter value that should be included in the report, either highlight it in the **'Search Results'** section and click the relevant arrow button, or double click it. For example, highlight *Aniseed Syrup* and then click the **'>'** button. If the search results list contains a large amount of data, it may be easier to use the search box. The user may enter part or all of the value they want into the box and press **'Search'**. For example, typing **'ob'** in the search box of *Items* would result in the following appearing in the **'Search Results'** section: *Uncle Bob's Organic Dried Pears* and *Mishi Kobe Nikku*. To view the full range of values again click the **'Show All'** button. Once the selection has been made, click the **'Done'** button. When the user returns to the filter page they will see the selected values highlighted.

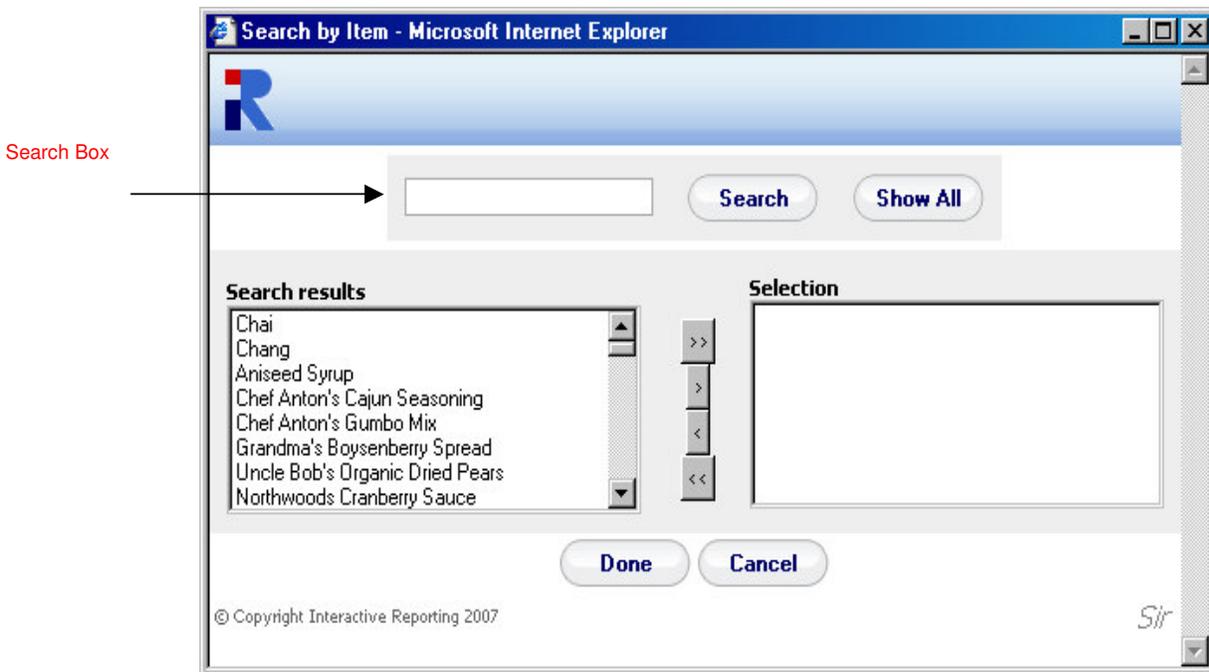


Figure 9

2.7 Add Numeric Filter

By clicking the **'Add a Numeric Filter'** link another section for filter selection appears, which corresponds to filtering any numeric fields that are relevant to the reports. This section contains a select list with all the source and result numeric fields that are used to generate the reports. Next to it there is a select list of options such as '>', '>=', '=' etc. Finally there is a text box in which the user can enter the value of the filter they wish. If the *between* option is chosen from the second list, two text boxes appear, one should hold the first value and the other the second value of the range that the user wishes to see data for. For example, a user can select to view only data with margin between 20% and 35%. In this case only data whose margin value corresponds to this range appear at the report. The user has the option to add more numeric fields by clicking the **'Add Another Link'**. Up to 5 numeric filters can be added for a report generation. If the user wishes to remove any of these filters, they can click the delete icon next to the filter options.

2.8 Choose Report Configuration

The final section of the report wizard is choosing the report configuration, Figure 10. This contains four segments: **'Group By'**, **'Order By'**, **'View By'** and **'Customize Look and Feel'**.

The **'Group By'** option selects a variable by which a report is to be grouped. For example, the sales data for *Sales Reps* can be divided into monthly segments by selecting *Sales by Month* from the drop down menu.

The **'Order By'** option specifies the manner in which a report should be ordered. For example, the sales data for *Sales Reps* can be ordered on *Qty*. When the report is generated the *Sales Reps* will be listed in order of the highest *Qty*. Please note that this does not apply to grouped charts, pivot or comparison charts.

The **'View By'** option specifies a selection of data to be visible at a report. The **'View'** list contains five options,

- **All** - to select all the data
- **Top 20** - to select the top 20 results
- **Top 50** - to select the top 50 result
- **Bottom 20** - to select the bottom 20 results
- **Bottom 50** - to select the bottom 50 result.

The associate **'By'** field is the value upon which the Top/Bottom 20/50 is chosen on.

The **'Customize Look and Feel'** link when clicked, allows the user to format the appearance of the report, by selecting the Font family, the Font size and colour. The **'Show in Page'** setting provides a selection of options with respect to how many data

should appear on a report page. There are four numeric options, 50, 100, 200 and 500, and two non-numeric options, 'All with scrolling' and 'All w/o scrolling'. The numeric options correspond to how many records will appear at a report page. If the report contains more records than this selection, the remaining ones will be shown at subsequent pages, holding the same amount of data. For example, if a user selects to show 100 results per page, a report that contains 360 records will be shown in 4 pages. If the option 'All with scrolling' is selected the whole set of data will be shown at a scrollable table within the borders of the browser screen. Otherwise, if the 'All w/o scrolling' option is chosen the whole range of data will be shown on the browser window, extending as long as it takes.

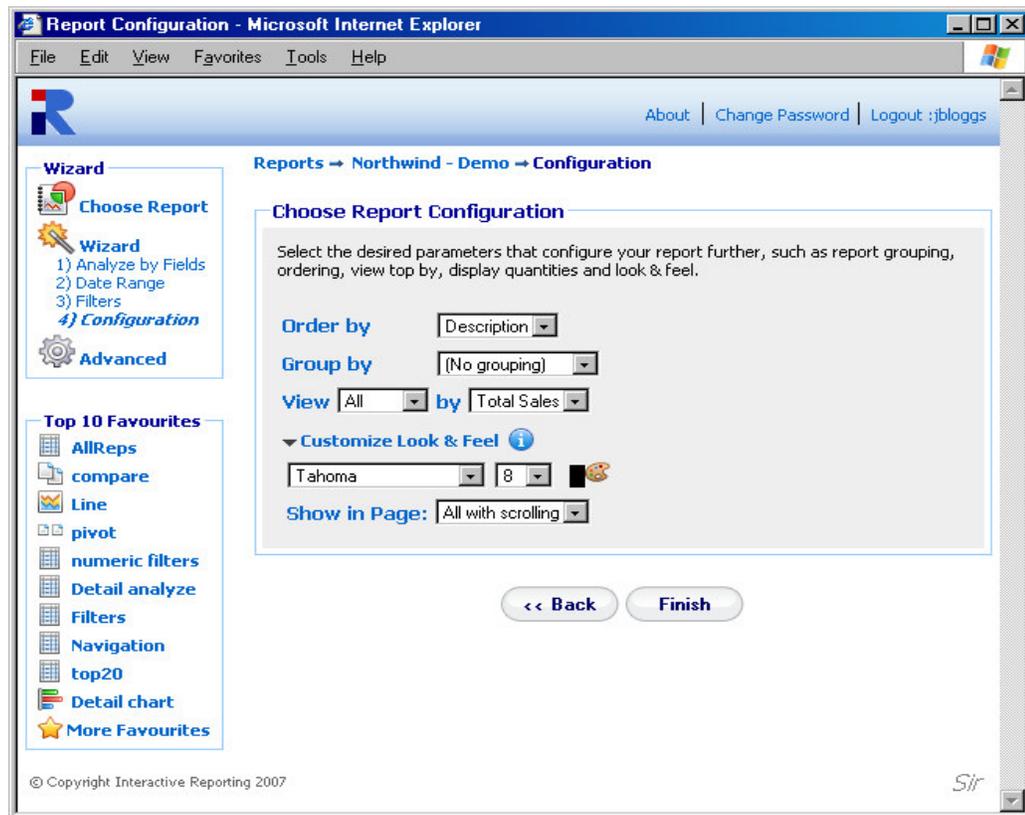


Figure 10

Figure 11 shows the first level of a report after following a set of selections from the wizard pages, as described above. The following settings have been used to generate this example report:

- **Select Report Type:** Standard Report
- **Choose Analysis Report Parameters:** *First Examine* is set to SalesRep, the top *Then drilldown into* is set to Customer and the final *Then drilldown into* is set to Categories.

- **Choose Date Ranges:** This was set to *Last Year*.
- **Filter Data:** All fields in the filter data were set to *All*
- **Choose Report Configuration:** Group By was set to *Sales by Quarter* while Order By was set to *Avg. Price*.

Reports → Northwind - Demo → Sales Rep by Quarter

Sales Date 01/01/2006-31/12/2006

Rep #	Name	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
7	King	€36.56	€36.75	€21,353.80	€21,461.60	€107.80	0.50%
3	Leverling	€23.28	€26.11	€26,445.60	€29,658.60	€3,213.00	10.83%
4	Peacock	€22.56	€25.54	€39,567.15	€44,795.20	€5,228.05	11.67%
1	Davolio	€17.39	€20.52	€12,993.55	€15,330.10	€2,336.55	15.24%
8	Callahan	€16.31	€19.08	€16,471.15	€19,271.60	€2,800.45	14.53%
2	Fuller	€16.53	€18.32	€6,894.00	€7,639.30	€745.30	9.76%
6	Suyama	€16.19	€16.05	€4,144.40	€4,109.80	-€34.60	-0.84%
9	Dodsworth	€11.42	€14.12	€2,410.00	€2,979.30	€569.30	19.11%
5	Buchanan	€14.26	€14.01	€2,681.65	€2,634.40	-€47.25	-1.79%
Total(9) Q1 2006		€21.09	€23.46	€132,961.30	€147,879.90	€14,918.60	10.09%
6	Suyama	€21.41	€30.25	€10,384.20	€14,670.74	€4,286.54	29.22%
3	Leverling	€21.49	€29.98	€24,945.25	€34,808.75	€9,863.50	28.34%
2	Fuller	€20.31	€28.14	€18,520.00	€25,667.50	€7,147.50	27.85%
4	Peacock	€20.40	€27.49	€19,396.00	€26,138.75	€6,742.75	25.80%
1	Davolio	€19.36	€25.16	€11,946.85	€15,520.90	€3,574.05	23.03%
7	King	€16.69	€24.22	€9,528.10	€13,830.60	€4,302.50	31.11%
5	Buchanan	€18.07	€22.30	€6,686.00	€8,252.40	€1,566.40	18.98%
9	Dodsworth	€14.69	€20.42	€3,246.50	€4,512.30	€1,265.80	28.05%
8	Callahan	€14.65	€19.41	€6,197.20	€8,209.15	€2,011.95	24.51%

Figure 11

2.9 Chart Report

The generation of a Chart report is very similar to that of a Standard report with only two variations. The first is the extra wizard **‘Choose Chart Format’** page that allows the user to select the type of chart they wish the data to be displayed, as shown in Figure 12. This page appears after the **‘Select Report Type’** page, and contains four charting types. The user simply clicks the chart type they wish for their report display.

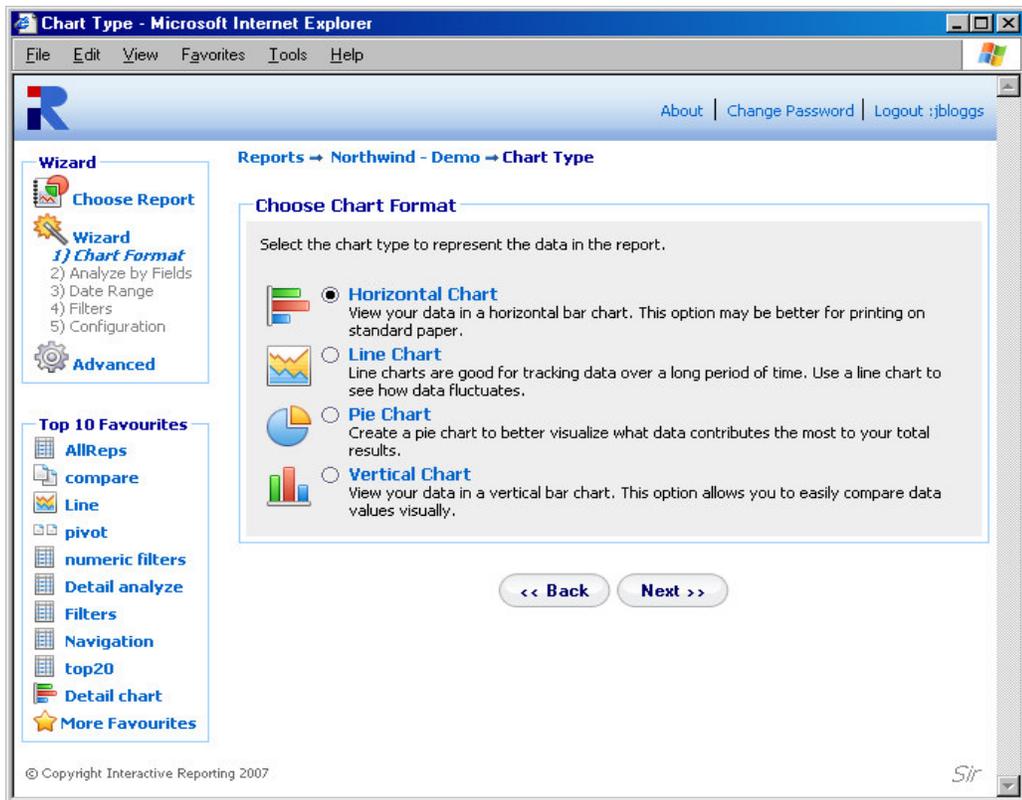


Figure 12

The second variation appears at the 'Choose Report Configuration' page, and it is mainly the existence of an extra criterion for selecting the 'Chart Quantity', see Figure 13. This sets the value they wish the data to reflect in their chosen chart. Again the user simply clicks on the desired option to make their selection.

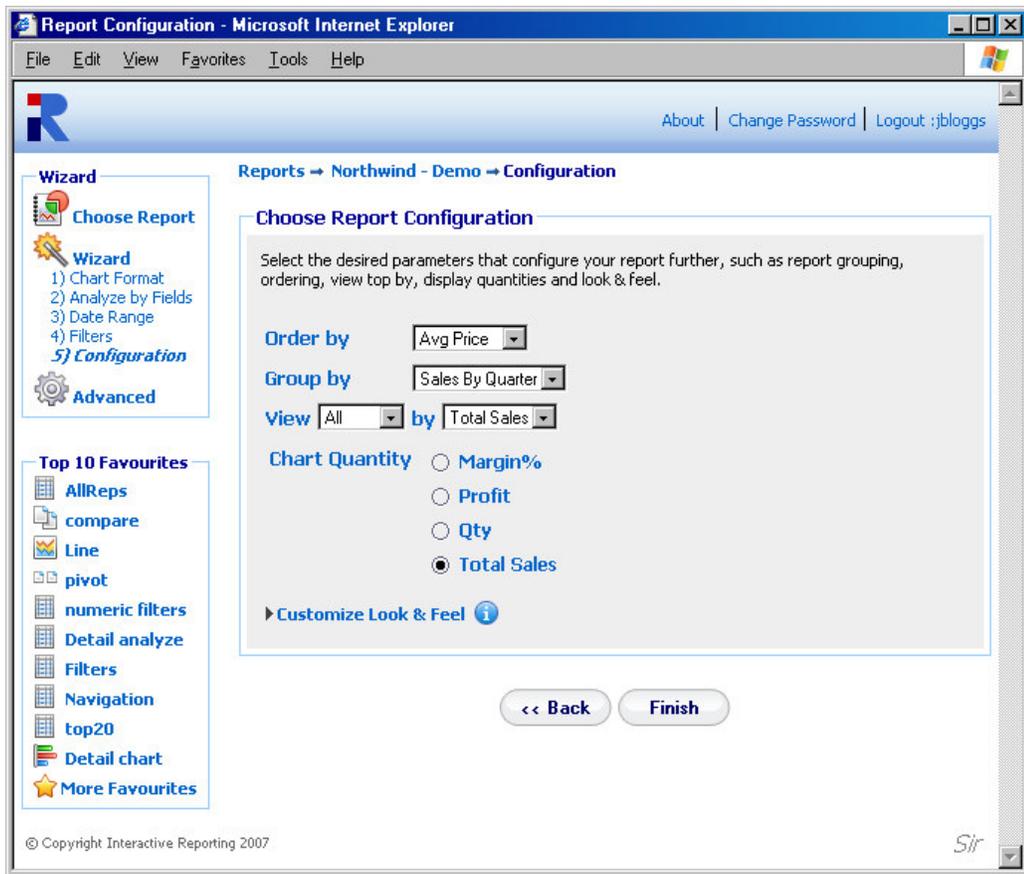


Figure 13

Figure 14 shows a Pie chart report with the Chart quantity set to *Profit*.

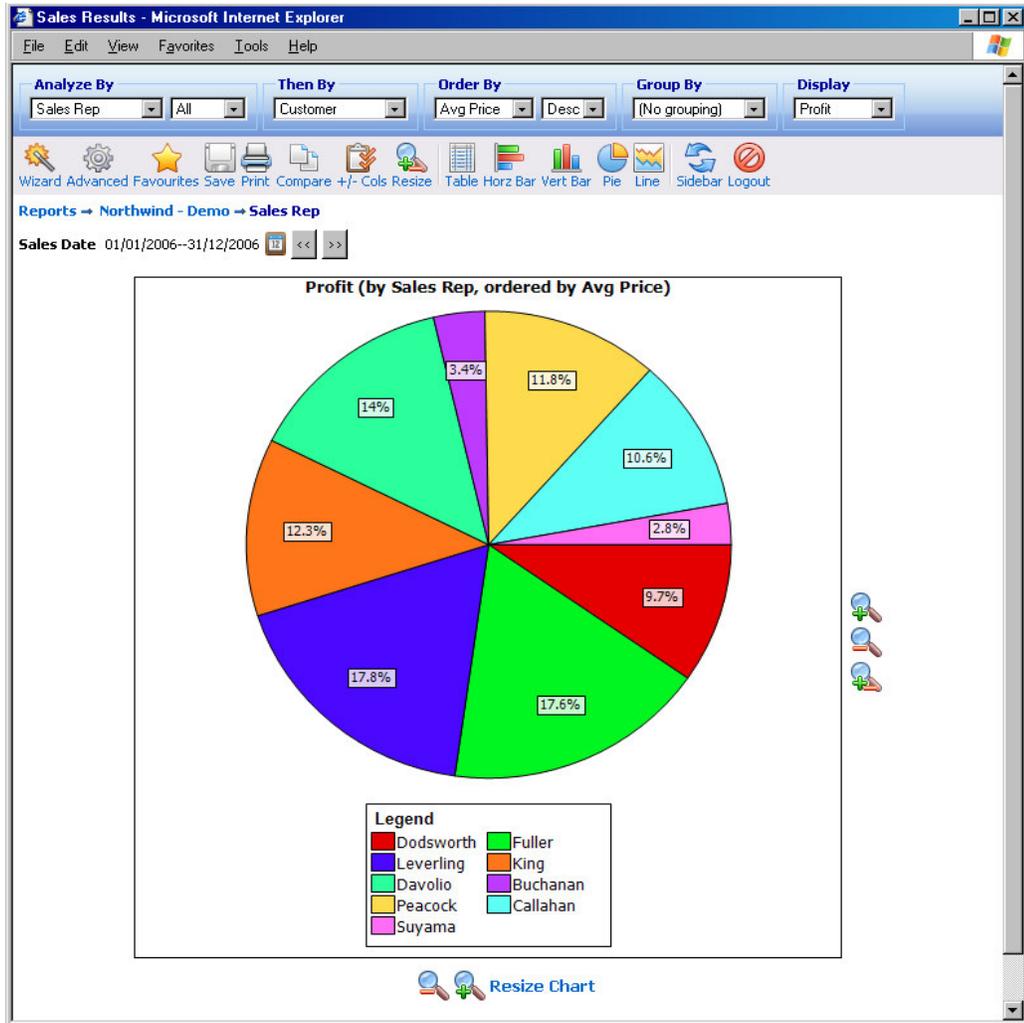


Figure 14

2.10 Pivot Report – Comparing Two Sets of Data

The first page of the wizard for generating Pivot Reports differs from all of the other options. A Pivot Report allows the user to compare two sets of data against one another. This differs from a comparison report where the same set of data is compared over different time periods.

In the '**Choose Pivot Report Parameters**' page the user must decide on the layout for the report, which value shall be displayed along the horizontal and which along the

vertical direction. The **'Then drilldown into'** option determines the second level of report after a report value is clicked. For example, if the **'Then drilldown into'** value is set to *Categories*, when clicking *Buchanan* in the pivot report, all *Categories* for Sales Rep *Buchanan* will be displayed.

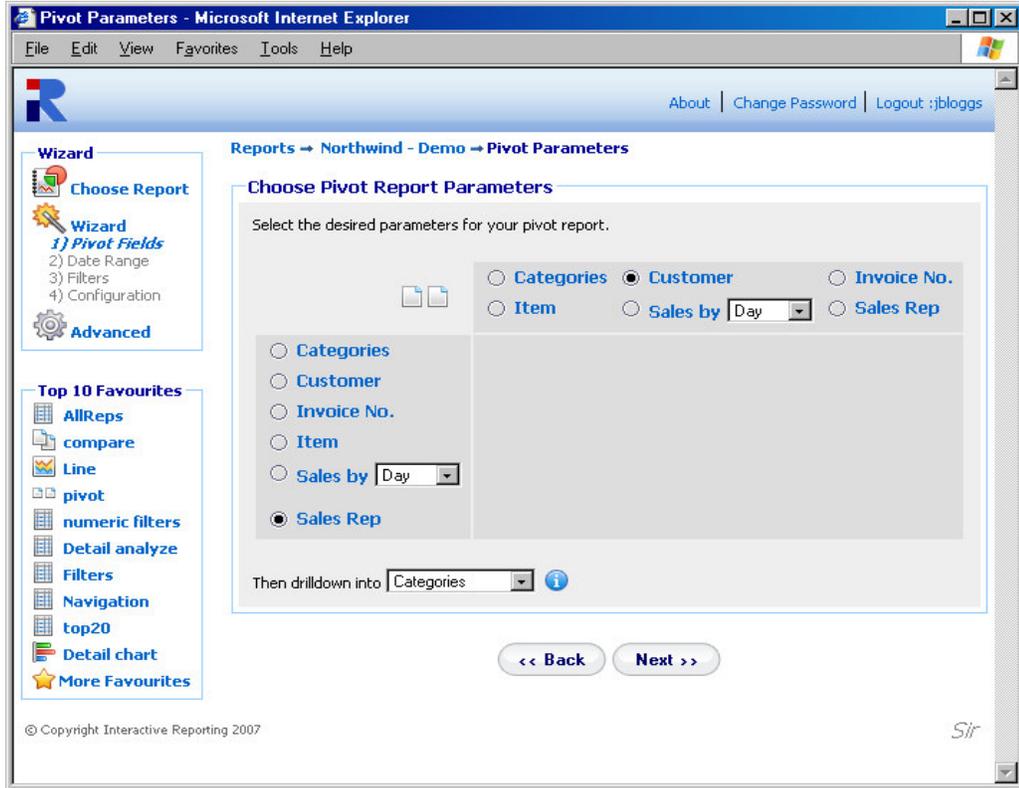


Figure 15

In a similar fashion to the Chart reports, the **'Choose Report Configuration'** page differs from that of the Standard report, in that it contains the option to select for which quantity to view the pivot report. The extra option **'All'** allows the pivot report to be performed on all quantities that are contained in the **'Pivot Quantity'** list.

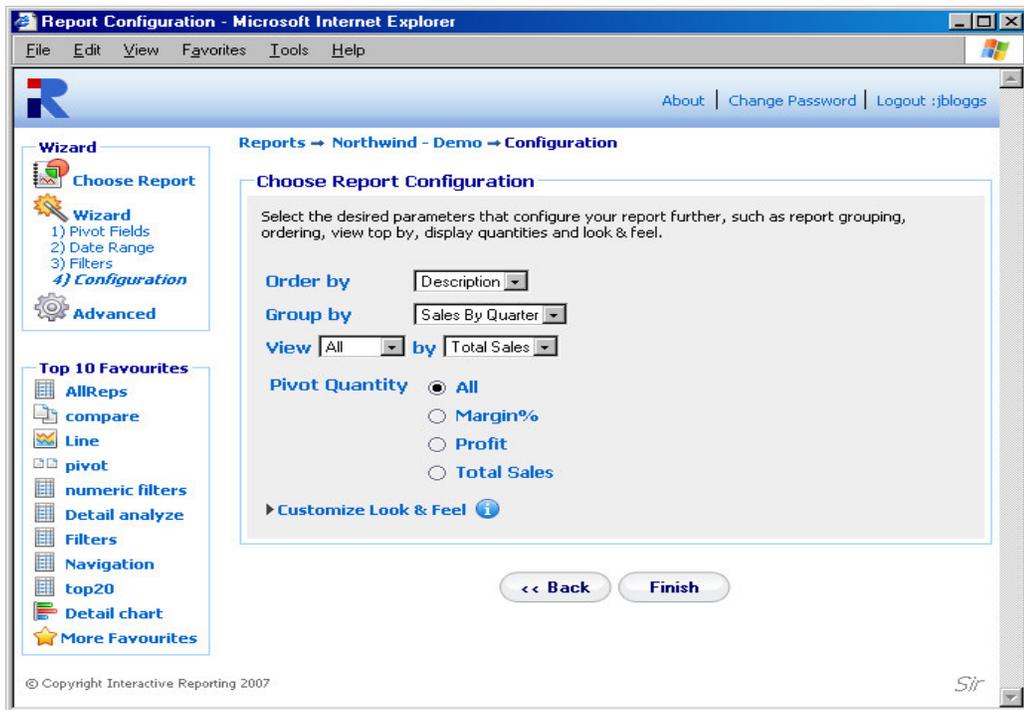


Figure 16

Figure 17, below, shows a pivot report for *Sales Rep vs Sales by Month* with all the pivot quantities shown at the report.

	Jan 2006	Feb 2006	Mar 2006	Apr 2006	May 2006	Jun 2006	Jul 2006	Aug 2006	Sep 2006	Oct 2006	Nov 2006	Dec 2006	Tot
5 Buchanan	€0	€0	€2,634.40 -€47.25 -1.79%	€0	€5,127.50 €882.00 17.20%	€3,124.90 €684.40 21.90%	€6,475.40 €2,042.90 31.55%	€3,636.70 €802.70 22.07%	€2,091.70 €570.50 27.27%	€8,365.20 €3,488.70 41.70%	€509.75 €171.75 33.69%	€629.50 €312.00 49.56%	€32,595.00 €8,907.00 27.33%
8 Callahan	€6,701.10 €1,436.90 21.44%	€7,764.40 €1,352.15 17.41%	€4,806.10 €11.40 0.24%	€800.50 €199.80 24.96%	€4,792.60 €1,251.80 26.12%	€2,616.05 €560.35 21.42%	€3,984.10 €1,330.60 33.40%	€4,756.50 €1,393.00 29.29%	€2,891.40 €986.40 34.11%	€11,598.17 €2,852.22 24.59%	€4,337.50 €1,344.80 31.00%	€4,728.10 €1,680.60 35.54%	€59,776.00 €14,400.00 24.0%
1 Davolio	€7,331.60 €1,218.00 16.61%	€2,504.60 €554.00 22.12%	€5,493.90 €564.55 10.28%	€240.00 €64.00 26.67%	€9,168.25 €2,254.15 24.59%	€6,112.65 €1,255.90 20.55%	€19,997.88 €5,553.88 27.77%	€5,119.10 €1,743.75 34.06%	€8,461.50 €2,229.60 26.35%	€12,920.15 €3,906.35 30.23%	€4,106.70 €602.30 14.67%	€16,077.25 €3,601.30 22.40%	€97,533.00 €23,547.00 24.1%
9 Dodsworth	€1,208.50 €210.00 17.38%	€0	€1,770.80 €359.30 20.29%	€611.00 €273.00 44.68%	€139.80 €37.80 27.04%	€3,761.50 €955.00 25.39%	€28.00 €10.00 35.71%	€1,928.00 €654.25 33.93%	€10,412.40 €3,838.60 36.87%	€378.00 €57.60 15.24%	€7,398.05 €1,662.55 22.47%	€1,941.50 €274.00 14.11%	€29,577.00 €8,332.00 28.1%
2 Fuller	€3,150.20 €403.10 12.80%	€1,584.00 -€180.00 -11.36%	€2,905.10 €522.20 17.98%	€14,019.30 €4,386.30 31.29%	€4,589.60 €1,193.60 26.01%	€7,058.60 €1,567.60 22.21%	€10,320.00 €3,250.50 31.50%	€57.50 €20.00 34.78%	€9,622.25 €2,969.85 30.86%	€10,164.80 €3,568.30 35.10%	€3,652.50 €1,154.30 31.60%	€7,834.75 €2,360.15 30.12%	€74,956.00 €21,215.00 28.3%
7 King	€13,703.40 €274.60 2.00%	€3,891.00 -€145.50 -3.74%	€3,867.20 -€21.30 -0.55%	€5,707.35 €1,146.05 20.08%	€6,041.25 €2,363.95 39.13%	€2,082.00 €792.50 38.06%	€6,144.60 €1,691.60 27.53%	€7,853.05 €2,387.25 30.40%	€13,839.29 €4,130.89 29.85%	€642.00 €250.00 38.94%	€1,990.00 €335.00 16.83%	€928.00 €211.00 22.74%	€66,686.00 €13,416.00 20.1%
3 Leverino	€7,477.90 €1,355.50	€10,581.30 €1,634.60	€11,599.40 €222.90	€10,297.35 €2,429.35	€18,639.80 €5,344.45	€5,871.60 €1,589.70	€1,109.15 €511.15	€5,881.80 €1,406.60	€3,595.50 €965.00	€8,572.75 €2,688.60	€9,668.00 €2,589.06	€18,494.00 €5,245.30	€111,786.00 €26,533.00

Figure 17

2.11 Comparison Report

The Comparison Report is the final report wizard option. This report allows the user to compare data over two (or four) date ranges. To generate a comparison report the user follows the same set-up format as the standard report with one difference. The 'Choose Date Range' page of Standard report has been replaced by the 'Choose Comparison' page, as can be seen in Figure 18. Here the user is provided with a number of options. First, the user must select the date type for which they wish to create the comparison report. Some reports may offer more than one type of date, e.g. *invoice dates*, *sales date* and *delivery dates*, which can be selected from the 'Compare' list. Second, the user must decide whether they want to compare two or four date ranges. To compare data over four date ranges, the user must click on the 'Advanced' link. The display will change to that of Figure 19. Once the date type and the complexity levels have been decided the user must then enter the **Desired Date Ranges**. This can be done in exactly the same way as it was described in the date range selection of standard reports.

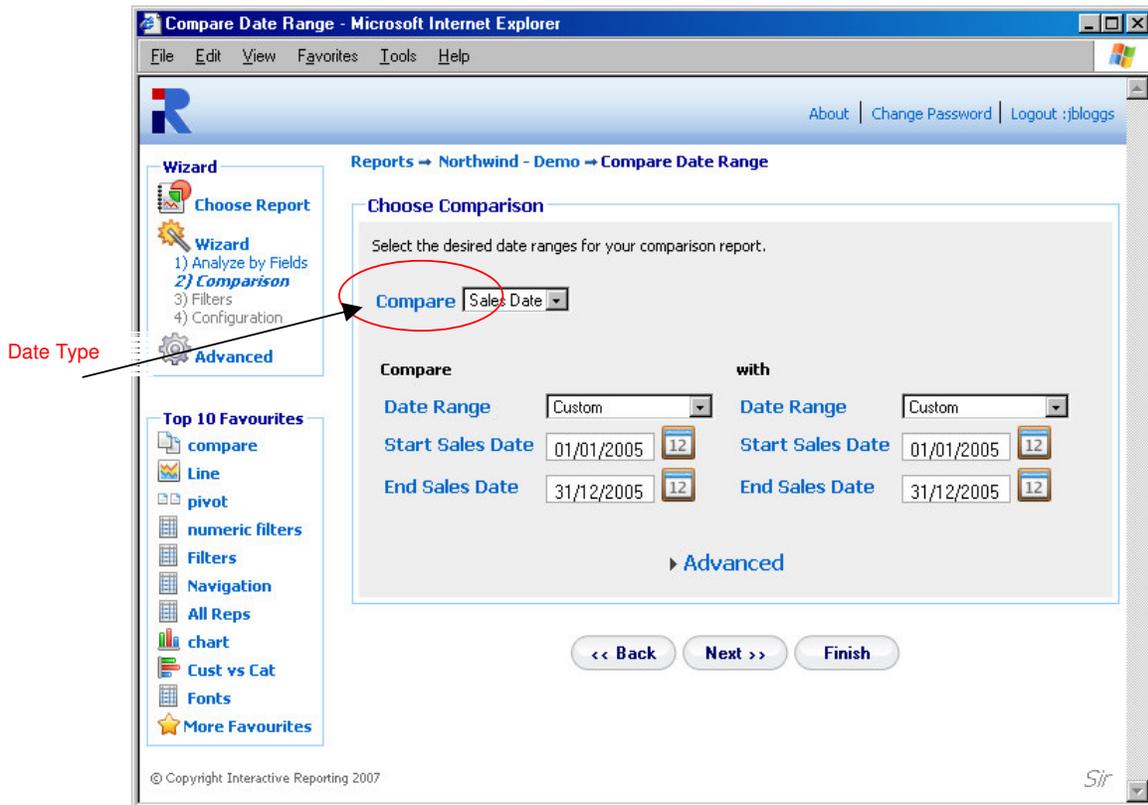


Figure 18

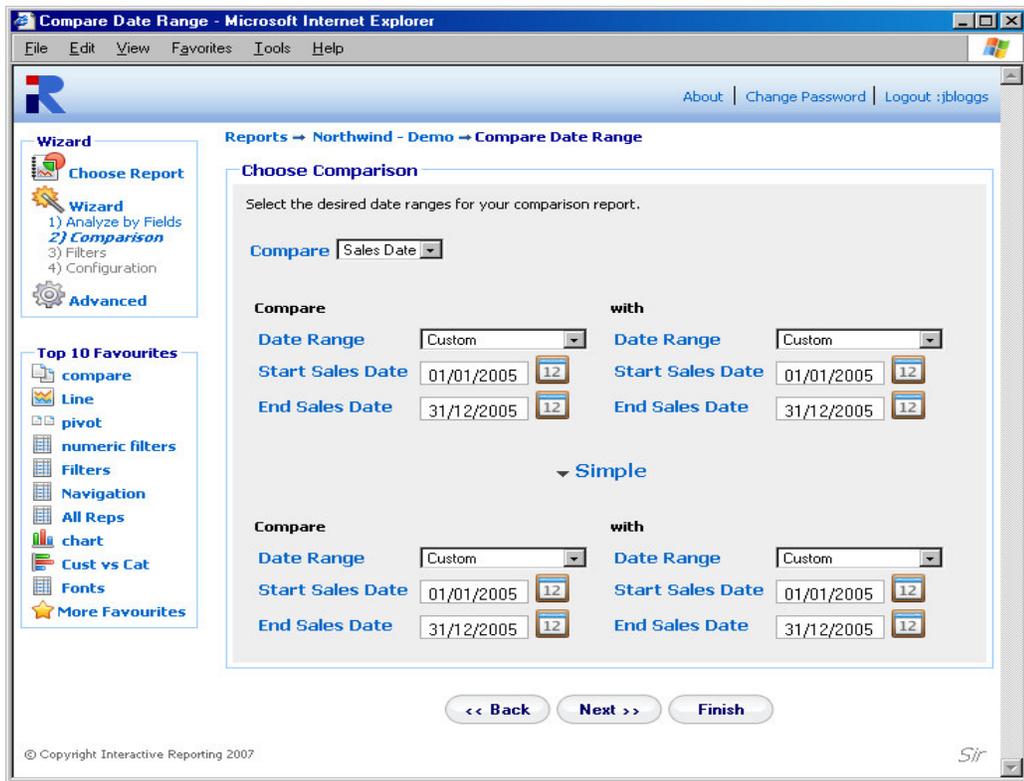


Figure 19

An example of a comparison report is presented in Figure 20. The following report compares the sales figures from each *Sales Rep* between the last quarter of 2005 and the first quarter of 2006.

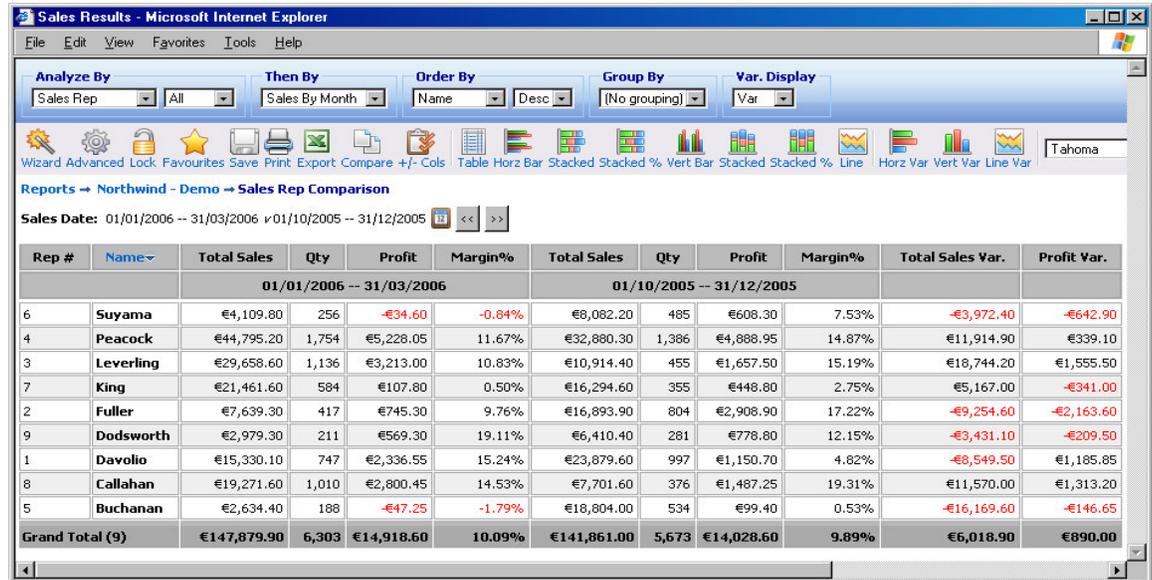


Figure 20

2.12 Advanced Reporting

The 'Advanced Reporting' option directs the user to the advanced reporting interface for generating reports. This option refers mainly to users that have greatly familiarized themselves with Interactive Reporting and can create their reports from a more compact page than the simple wizard pages. The Advanced Reporting Tool is explained in more detail in Chapter 4.

2.13 View Favourites

The 'View Favourites' option directs the user to a list of predefined reports, as shown in Figure 21. The list contains all previously saved reports that the user has generated. Any favourite reports that other users have created can also be shown, if they have given access to their favourites to be shared with the current user, for example the favourite *All Reps* of Figure 21. The current user may choose not to view any shared favourites by clicking on the 'Hide Shared' Link at the top of the page. When a favourite report is scheduled for emails, a mail icon appears next to the favourite's title. By clicking the 'Edit' icon the user can modify the favourites options. The current user cannot edit and/or delete any shared favourites from other users.

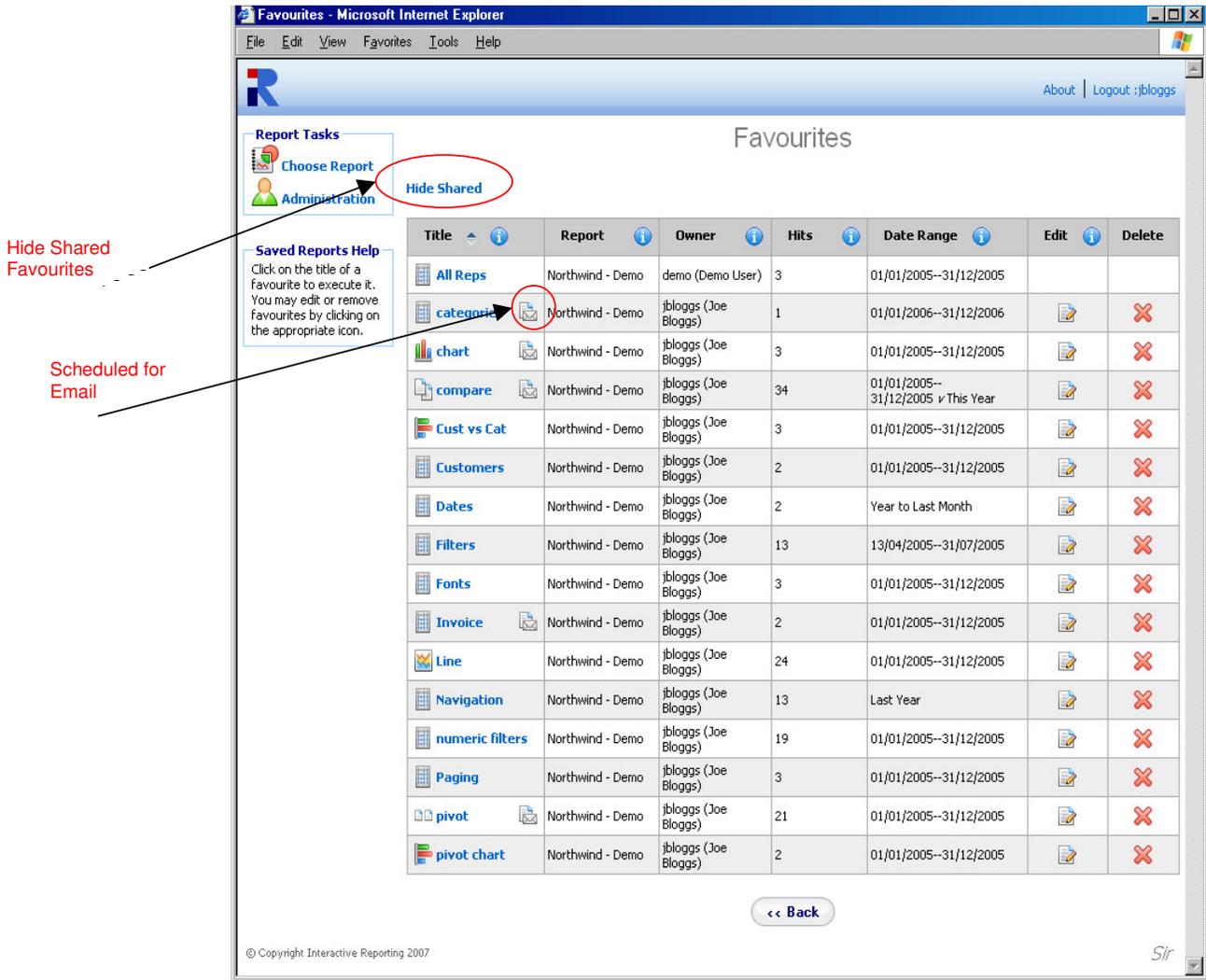


Figure 21

When clicking on the 'Edit' icon the user is directed to a screen as the one shown in Figure 22. When on this page, the user can change the title of the favourite report, schedule it for emails, share the favourite with other user(s) and/or groups, and modify its definitions. To schedule emails to be sent to specific email addresses the 'Schedule Email' checkbox must be clicked, and the page changes to the one shown in Figure 23. The user can select how frequently they wish the favourite to be emailed, which can be daily, weekly and which days of the week, monthly and which day of the month. The email address should be typed at the provided text box, with multiple recipients addresses separated by commas. To share a favourite with any other user or groups of users, the user must click the 'Share Favourite' link to see a screen like that of Figure 24. To select the users to share the favourite with, highlight the users of choice and use the appropriate buttons to move them to the 'Shared with' box (multiple and single selections are permitted), or double click on the choices of interest.

To modify the favourites definitions the user must click the **'Modify Favourite Definitions'** link, which directs to an advanced interface page. That page allows the user to change any of the reports variables they wish, such as first, second, etc. levels of drilldown, date ranges, type of report and many more.

By clicking the **'Save'** button the new settings are saved for the favourite and the user is redirected to the **'Favourites'** page.

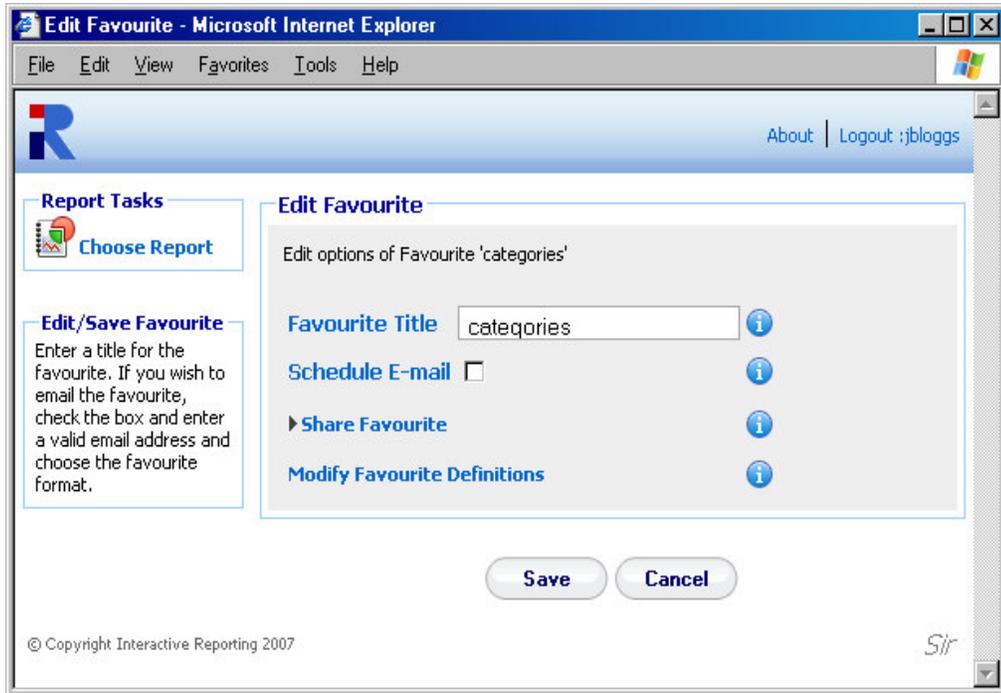


Figure 22

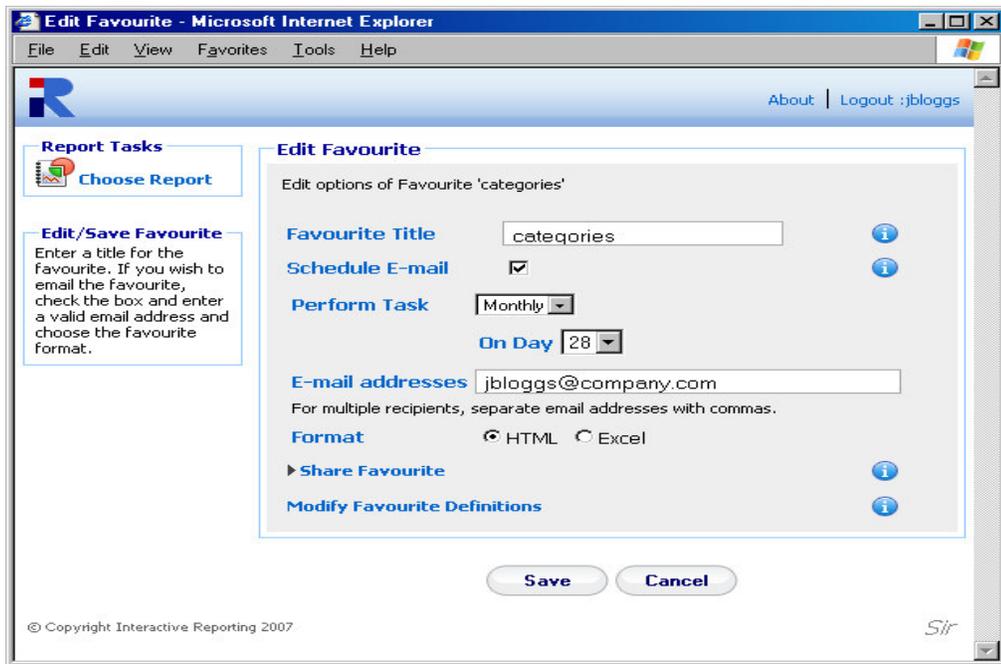


Figure 23

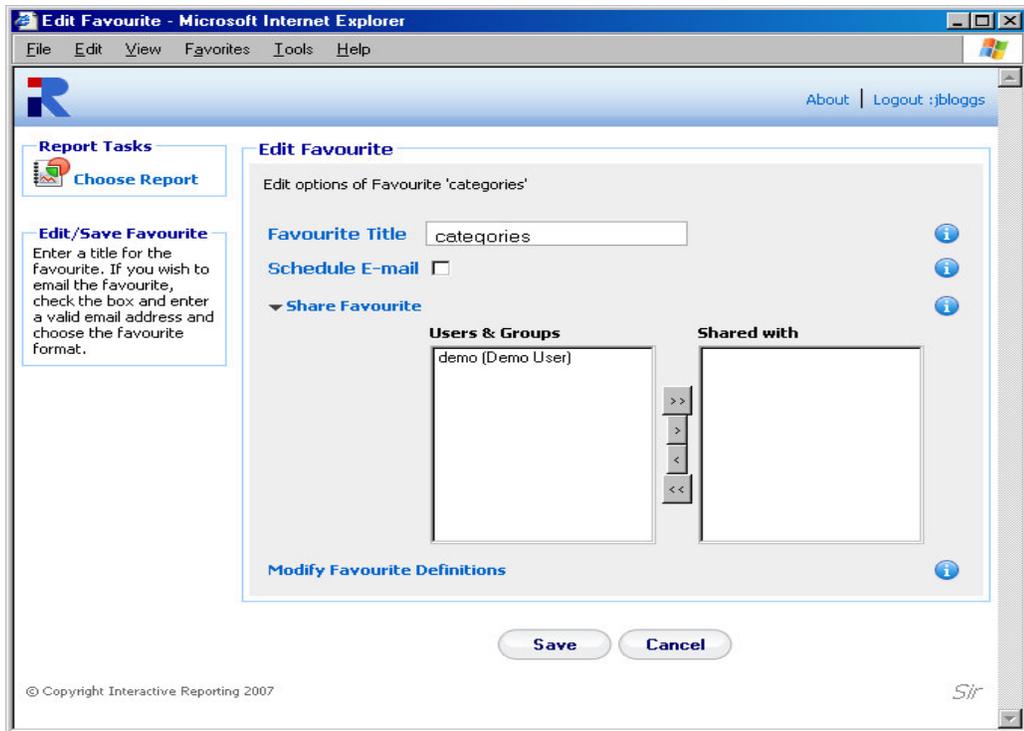


Figure 24

Generating Advanced Reports

Putting Interactive Reporting to Work...

INTERACTIVE REPORTING provides a more advanced but easy-to-use interface to your company's performance data. It provides a point-and-click means of specifying the sales data you wish to analyse. The initial screen varies according to how many reports are available to the user. If there is more than one report, after login the user will be directed to the screen displayed in Figure 2. To generate an advanced report the user must click the **'Advanced'** link next to the name of the desired report. If there is only one report available to the user, the initial screen that is displayed can be seen in Figure 5. To generate an advanced report the user simply clicks the **'Advanced Reporting'** link and they will automatically be directed to the advanced screen. The **'Advanced'** page is a culmination of all options available to the user in the wizard report-generating tool.

There are two formats of the **'Advanced'** page, the **'Simple'** and the **'Classic'** advanced pages. They both perform the same actions, but they differ on the way the various options are displayed in the page. If the system administrator has selected the simple advanced format for a report, the page shown will look like the one in Figure 25. If the classic advanced page is selected, the **'Advanced'** page that the user sees is shown in Figure 26. Once all the parameters of the report have been set, such as the variable by which to analyse, the ordering of the data, the filters to restrict the data the report will analyse, the report can be generated in an instant. In the simple **'Advanced'** page the user just presses the **'Go'** button (either at the top or at the bottom of the page). In the classic **'Advanced'** page the user clicks any of the report type buttons at the end of the page, depending on the sort of report they are interested in.

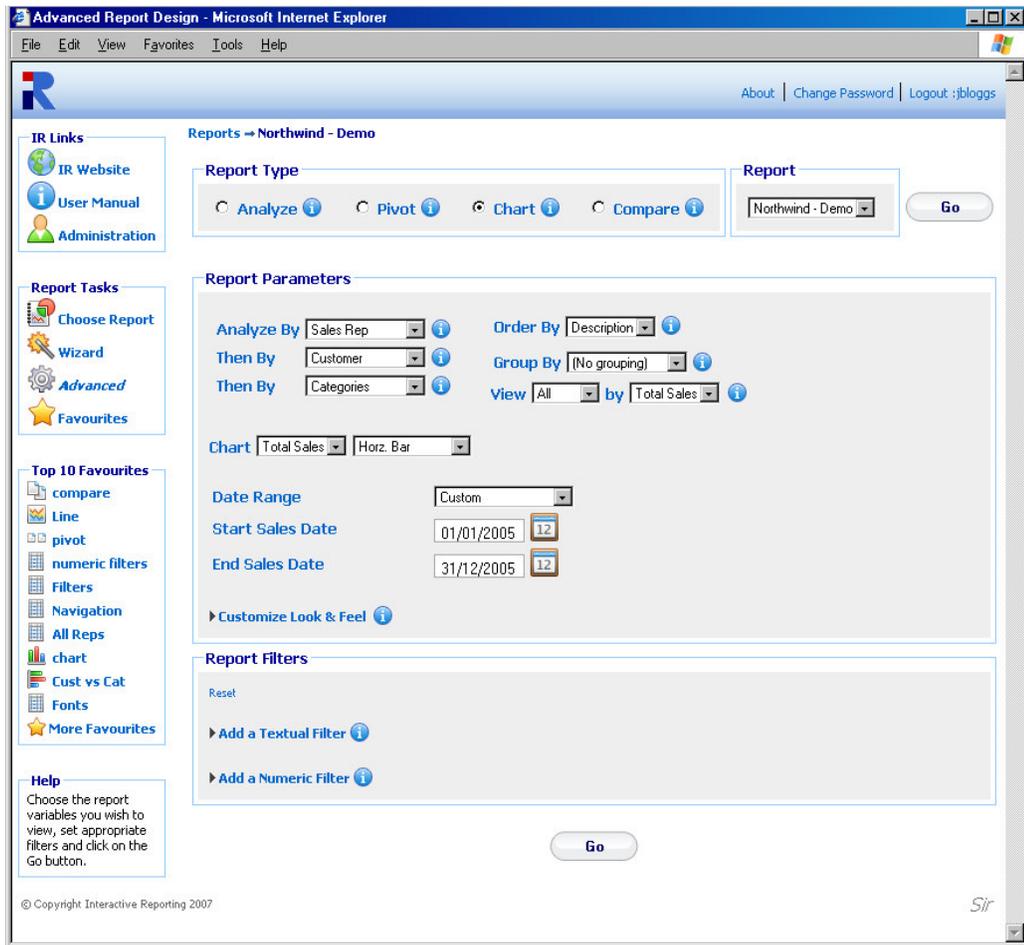


Figure 25

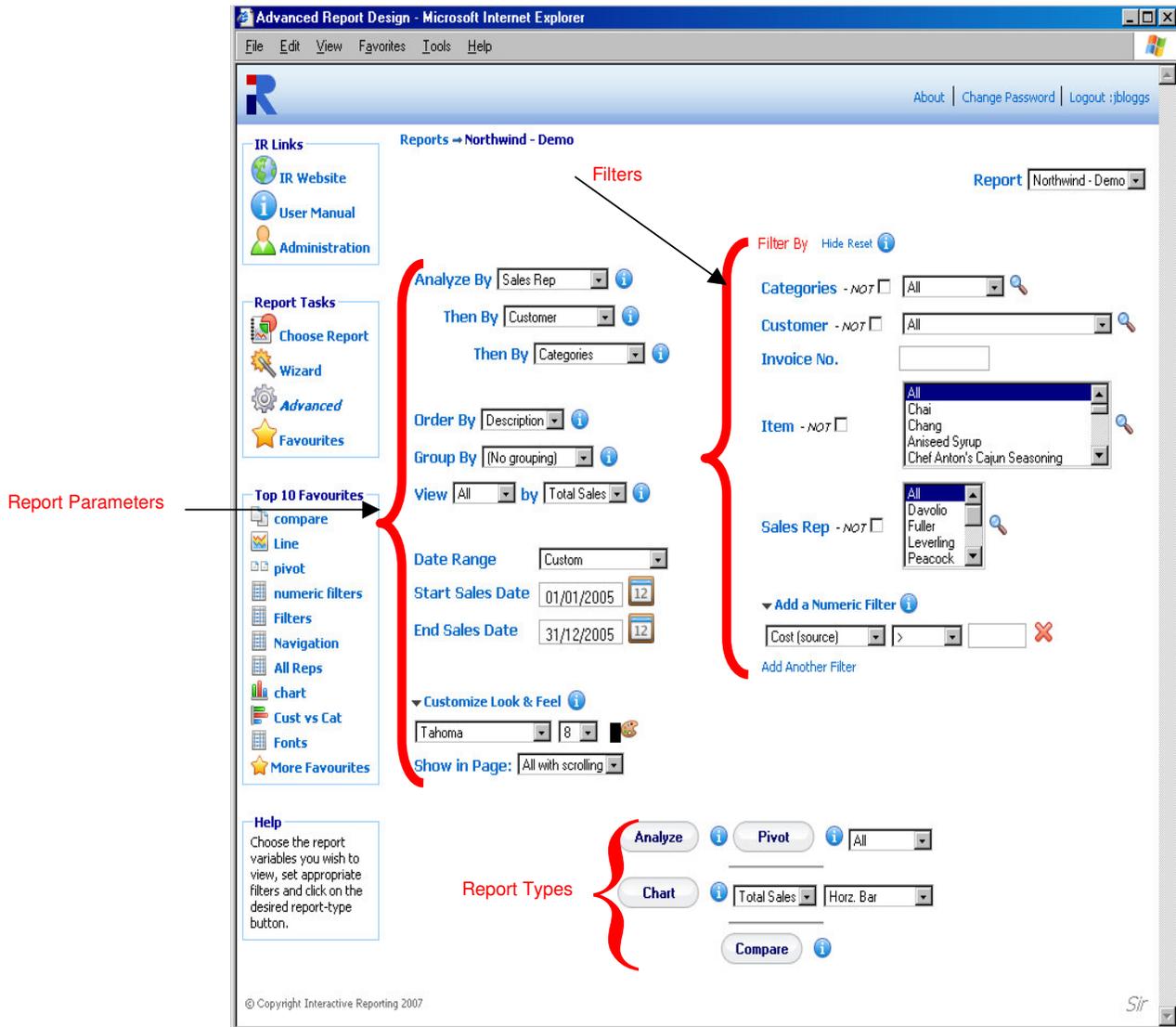


Figure 26

3.1 Report Types

There are four available types of reports:

- **'Analyze'** – a standard (one-dimensional) report, which may be grouped and is suitable for producing simple charts.
- **'Pivot'** – a two-dimensional report which provides a table of results – a user may choose to display a number of quantities such as *Margin*, *Profit*, *Total Sales* or a combined report with all the pivot quantities.

- **'Chart'** – a one-dimensional report, containing the desired quantity, e.g. *quantity*, *margin*, in the form of a horizontal/vertical bar, pie or line chart. Grouping by a certain variable results in a grouped or stacked chart.
- **'Compare'** – allows the user to compare data across different time periods.

Simple Advanced page: The user can select the report type they wish to view by selecting one of the radio button options of the **'Report Type'** section of the page.

Classic Advanced page: The report type is selected by clicking the appropriate report types button at the bottom of the screen.

3.2 Report Selection

The **'Report'** select list that appears at the top of both the simple and classic advanced pages, allows the user to select a different report. The select list contains the same reports that appear at the **'Choose Report'** page when logging in. If the user has access to only one report, the **'Report'** selection list will contain only that report. By changing the report, the user is directed to the advanced page specific to the new report.

3.3 Report Parameters

The **'Report Parameters'** section allows the user to select the specific information they wish to see at the report, and to select how to format the report.

3.4 Report Variables

The report variables are the fields by which the user wishes to analyse their data. They may specify the following (using the drop-down list boxes):

- **'Analyze By'** – the main variable for which to display data. In the example above, it is *Sales Reps*. If an analysis is performed the first level of the report will display the *Sales Reps* data.
- **'Then By'** – the variable by which the user wishes to perform further analysis when going to secondary levels of the report. In the example above there are two **'Then By'** options, *Customer* and *Categories*. Let's assume that an analysis report is generated for *Sales Reps*. If a particular sales representative is selected, the customers of this sales representative are then displayed. If a particular customer is selected, the report will show all the categories used by this customer for the specific Sales Rep.

3.5 Report Ordering – Order By

This indicates how to sort the results of the report. Choices may consist of **'Description'** which sorts data alphabetically by description, **'Code'** which sorts data

by alphanumeric code, a list of numeric quantities that appear at the report, e.g. *Margin*, *Avg Cost*, *Total Sales* etc., which sort the data numerically. Depending on how the system administrator has configured the system, the 'Order by' list may differ.

3.6 Report Grouping – Group By

This optional setting indicates whether and how the user wishes to have the results of the report grouped. The user may select 'No Grouping' or specify a particular quantity by which to group. The latter option provides a breakdown according to the grouping specified.

3.7 Quantity of Data Displayed – View By

The 'View' option lets the user choose how much of the data should be displayed. It consists of five values:

- **All**: all the resulting data are shown.
- **Top 20**: displays the Top 20 values in the resulting report, sorted by the value selected from the select list next to the 'By' option. For example, an analysis by customers with *Top 20* by *Total Sales* results in the twenty customers with the highest total sales.
- **Top 50**: displays the Top 50 values in the resulting report as above.
- **Bottom 20**: displays the Bottom 20 values in the resulting report.
- **Bottom 50**: displays the Bottom 50 values in the resulting report.

3.8 Report Dates

The next set of options provides the date range from which the data will be extracted. The user can select a predetermined date range that may be chosen from the drop down menu of 'Date Range'. These include: *Last Year*, *YTD (Year to Date)*, *Last Quarter*, *Yesterday* and many more. If the user would prefer to enter their own specific date range then there are two options available to them. The first is to type the initial and final dates into the 'Start Sales Date' and 'End Sales Date' fields, respectively. The second option is to click on the calendar next to each date box and select the dates from there.

3.9 Customise Look and Feel

If the user wishes to customize the way their reports look, they can click the 'Customize Look and Feel' link to reveal the options that format the appearance of the report, by selecting the Font family, the Font size and colour. The 'Show in Page'

setting provides a selection of options with respect to how many data should appear on a report page or whether the results should appear within a scrollable table or not.

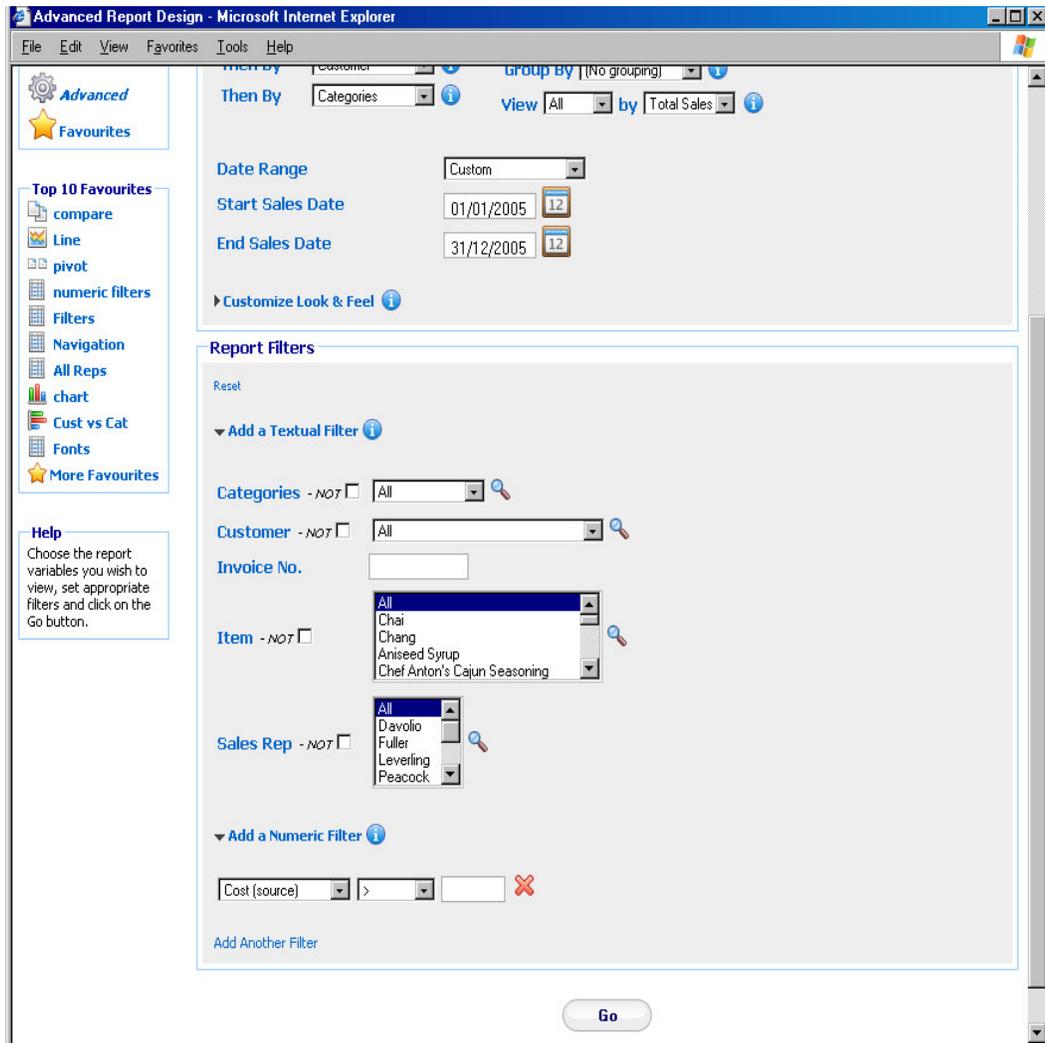


Figure 27

3.10 Report Filters

When generating reports, it is often desirable to restrict the analysed data to just a subset of what is available. Perhaps you are only interested in a particular category of goods, or the revenue generated by an individual member of the sales team. **INTERACTIVE REPORTING** filter mechanism allows restriction of data through text boxes. Simply enter the code/title (as appropriate) upon which you wish to restrict the report, and combo boxes; and then choose from a drop-down list of the codes/title for each particular category of information. In addition, numeric filters can be applied to the data, by adding restrictions to the source or result fields that are employed at the reports.

Simple Advanced Page: the list of filters appear when the **'Add a Textual Filter'** link is clicked, and the advanced page now displays all the existing filters, as shown in Figure 27.

Classic Advanced Page: the list of filters is visible by default at the right-hand-side part of the page. Clicking the **'Hide'** link next to the **'Filter by'** title can hide the filter list.

3.11 Search Icon

The **'Search'** icon (represented by the magnifying glass next to the filter values as shown in Figures 26 and 27) allows the user to select specific fields from the filter categories. This is especially useful if a filter has a large quantity of values or if the user wishes to select more than one value from a multi-select combo-box. Clicking on the magnifying glass opens a new page as the one shown in Figure 9.

To select a filter value that should be included in the report, either highlight it in the **'Search Results'** section and click the relevant arrow button, or double click it. If the search results list contains a large amount of data, it may be easier to use the search box. The user may enter part or all of the value they want into the box and press **'Search'**. To view the full range of values again click the **'Show All'** button. Once the selection has been made, click the **'Done'** button. When the user returns to the filter page they will see the values chosen highlighted.

3.12 Range Selection

Interactive Reporting supports ranged selection in text box filter fields such as the *Invoice* field seen in Figure 26. The character **":"** is used as the range indicator. Please note that the selection range is inclusive, i.e. **-5:3** is all records including **-5** and **3**. Examples:

- **-5:3** (from -5 to 3 inclusive)
- **:5** (everything less than or equal to 5)
- **8:** (everything greater than or equal to 8).
- **E:G** This also works in a case-insensitive fashion for characters - e.g. **E:G** will select E, F and G)

Viewing Reports

Interactive Reporting in Action...

To demonstrate the flexibility and easy-to-use functionality of Interactive Reporting we utilize the Northwind Traders database to generate reports. In a similar fashion to our example reports, Interactive Reporting can analyse your company's data within minutes.

4.1 Standard Report

A typical '**Standard**' report looks like the one shown in Figure 28. To generate this report you can use either the wizard or the advanced interfaces, as described in the previous chapters, to set '**Analyze by**' to *Customer*, '**Then by**' to *Item*, order the results by *Profit*, view the Top 20 records by *Total Sales*, set the initial and final dates to the beginning and end of 2005, respectively, and filter the data by *Sales Rep Fuller*.

The report page contains five parts: the report variables section on the page header, the Interactive Reporting functionality buttons, the Breadcrumbs, the date and non-date Navigation Filters, and the Report Results.

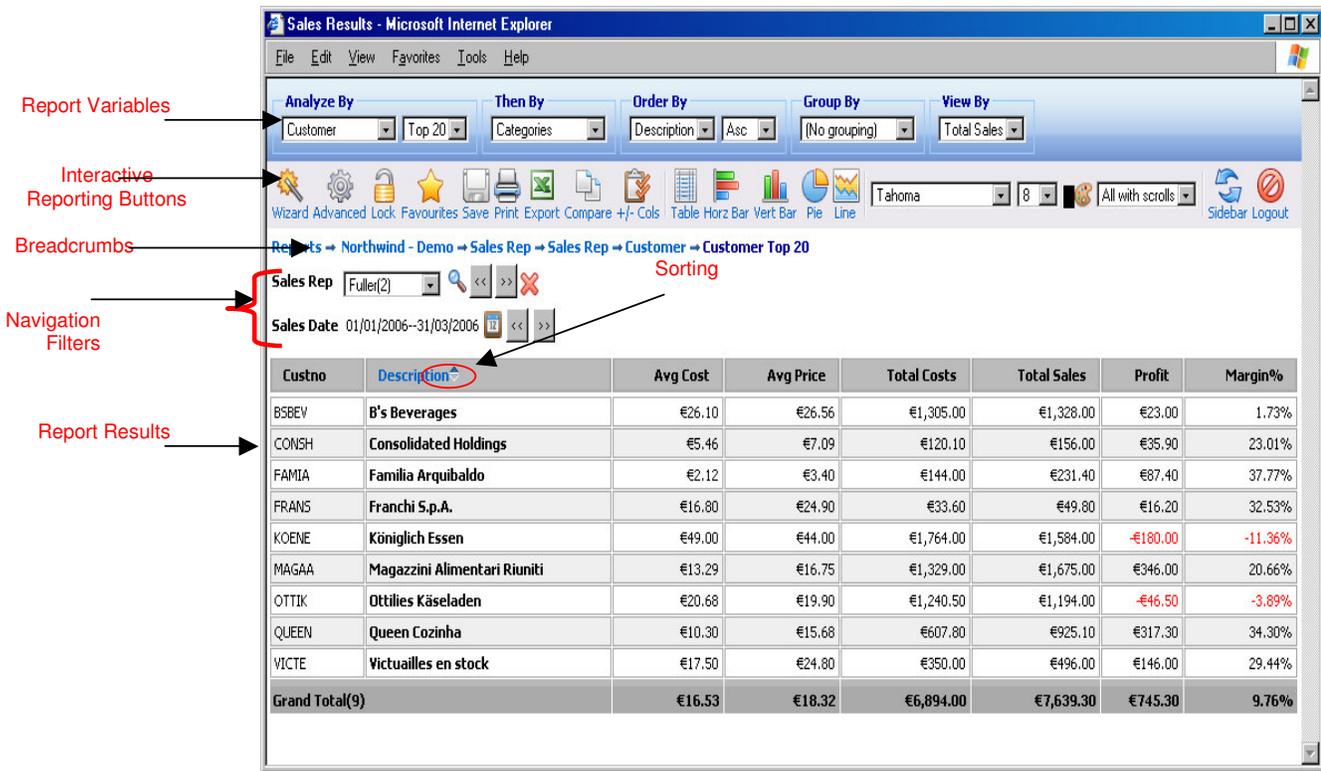


Figure 28

4.2 Report Variables

The report variables section at the header of the report page allows the user to modify their report without the need to return to the wizard or advanced interfaces. The user can change any of the report variable options, such as the field to analyze data by, the order by option, the group by field etc. The 'Then by' option allows the change of the secondary level of report.

4.3 Interactive Reporting Buttons

Interactive Reporting provides a set of buttons that perform various actions to the generated reports. Each type of report contains its own list of buttons. The buttons that appear at a standard report are the following:

- **Wizard** – directs the user to the wizard interface for the generation of a new report.
- **Advanced** – directs the user to the advanced interface for the generation of a new report.

- **Lock** – allows the user to lock some of the textual columns of a report.
- **Favourites** – directs the user to the 'Favourites' page that contains all the predefined reports, see Figure 21.
- **Save** – allows the user to save a report as a favourite. When clicking this button the user is redirected to the page of Figure 29. The user can set the title of the new favourite, schedule it for emails, and share it with other users. Clicking the 'Save' button returns the user to the report page.
- **Print** – enables the user to print the current report.
- **Export** – enables the user to view the report in Excel.
- **Compare** – allows the user to produce a comparison report from the one currently in view. Clicking this button directs the user to the comparison date range selection page, as shown in Figure 30. After selecting the desired date ranges for the report, click 'Compare' and the new comparison report appears.
- **+/- Cols** – allows the user to modify the report configuration by adding/removing columns that appear at the report. When this button is clicked a new window opens, as the one shown in Figure 31. The user can then select which textual and/or numeric fields wishes to hide or show at the report. When the user is finished with their selection, the 'Done' button must be clicked to return to the report page, which will now contain the new collection of fields.
- **Table** – displays the report at a table format, as shown in Figure 28.
- **Horz bar** – displays the report as a horizontal bar chart.
- **Vert bar** – displays the report as a vertical bar chart.
- **Pie** – displays the report as a pie chart.
- **Line** – displays the report as a line chart.
- **Fonts** – allows the user to select the font family, size and colour they prefer for viewing the report.
- **Paging** – allows the user to select how many data to view at a page or select whether to view data with or without scrollbars.
- **Sidebar** – allows the user to switch from the toolbar view to the sidebar view, which is shown at Figure 32. In this layout the buttons that appear underneath the header section of Figure 28 have now moved to the sidebar menu that

appears at the left side of the page. To switch back to the previous layout with the toolbar buttons, in Figure 32 the user must click the 'Toolbar' button.

- **Logout** – logs the user out of Interactive Reporting.



Figure 29

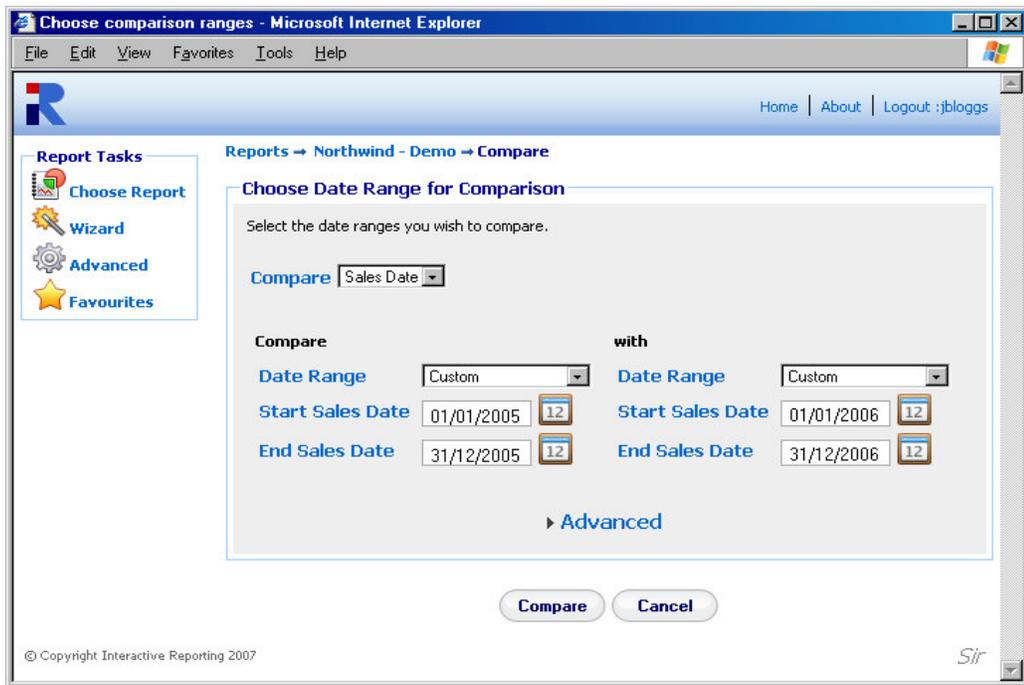


Figure 30

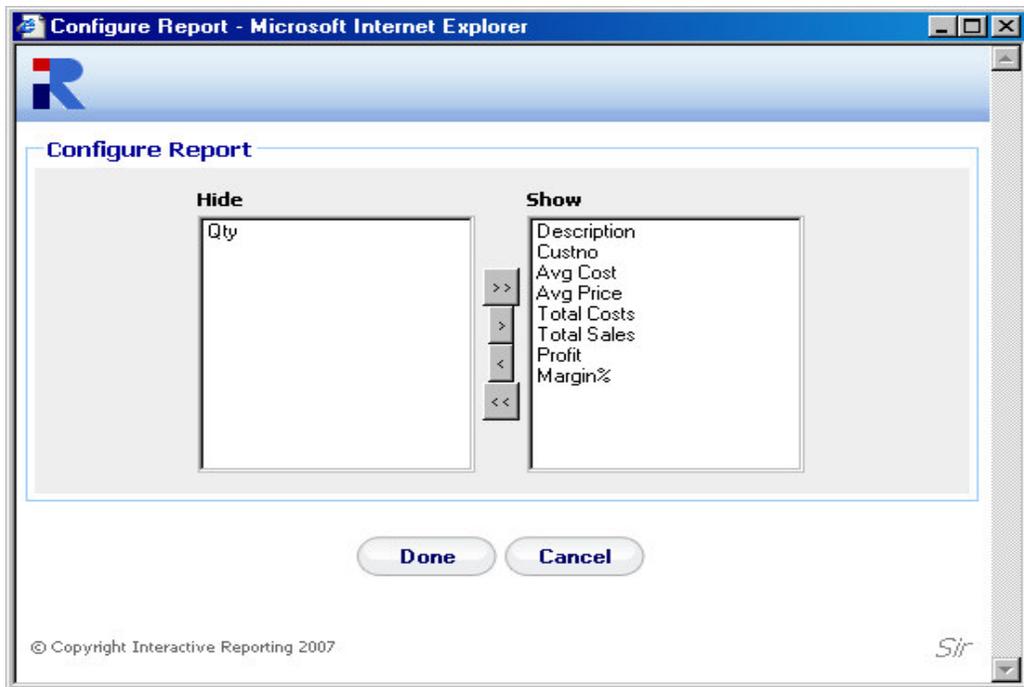


Figure 31

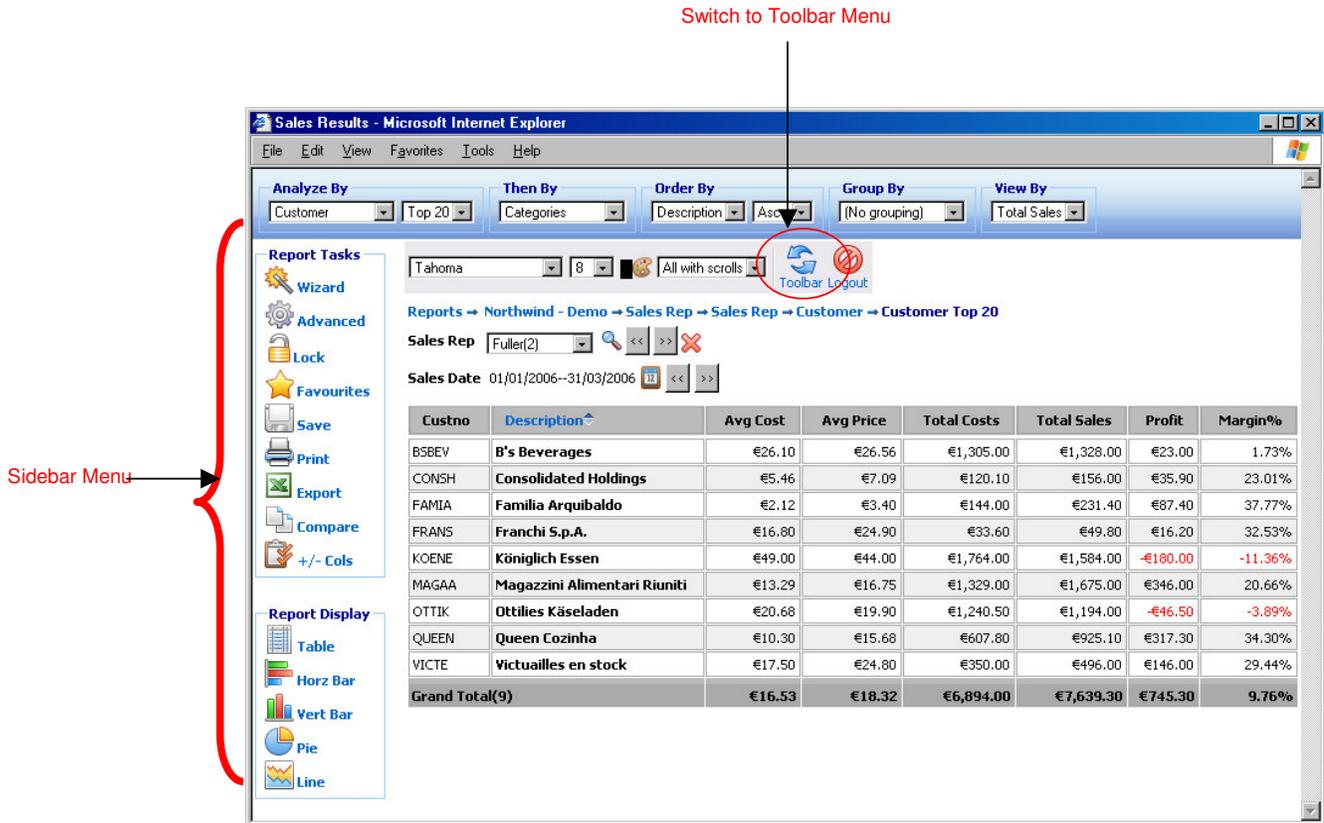


Figure 32

4.4 Breadcrumbs

The breadcrumbs indicate all the steps taken by the user to reach the current page/level of the report. To return to an earlier page the user simply clicks the relevant section of the breadcrumb link. The start of every breadcrumb is 'Reports' which redirects to the 'Choose Report' page. The second step of the breadcrumb sequence is the name of the report, which returns the user to the wizard or advanced interface depending on which one they used to create the particular report they view. Subsequent steps of the breadcrumbs return to previously visited Interactive Reporting pages or reports.

4.5 Navigation Filters

The navigation filters part of the Report Page contains all the non-date and date filters that have been used for the report. Apart from displaying useful information, the user also has the option to modify these filter values from the report page itself.

For non-date filters, a new filter value can be selected by changing the value of the select list that appears next to the filter name, for example in Figure 28 by changing the value of *Fuller* to *Buchanan*. Another way is to click on the search icon next to the select

list to make a single or multiple filter selection. The '<<' and '>>' buttons navigate to the previous and next values in the select list, respectively. Finally, a filter can be removed by clicking the delete icon next to its value. If a filter is of the text format, the select list that enables navigation does not appear, and the user can choose a new value by clicking the search icon.

The date range that determines a report can be modified more interactively from the same report page, by clicking the calendar icon next to the date range. A page like the one shown in Figure 33 enables the user to select a new date range for their report. The '<<' and '>>' buttons change the date range backwards and forwards by the same amount of time as the one used to generate the report. In the example report of Figure 28, clicking the '<<' button would have generated reports for the year 2004, or clicking the '>>' button would have generated reports for the year 2006. As another example, if a user had generated a report for April 2005, the '<<' and '<<' buttons would have created reports for March 2005 and May 2005, respectively.

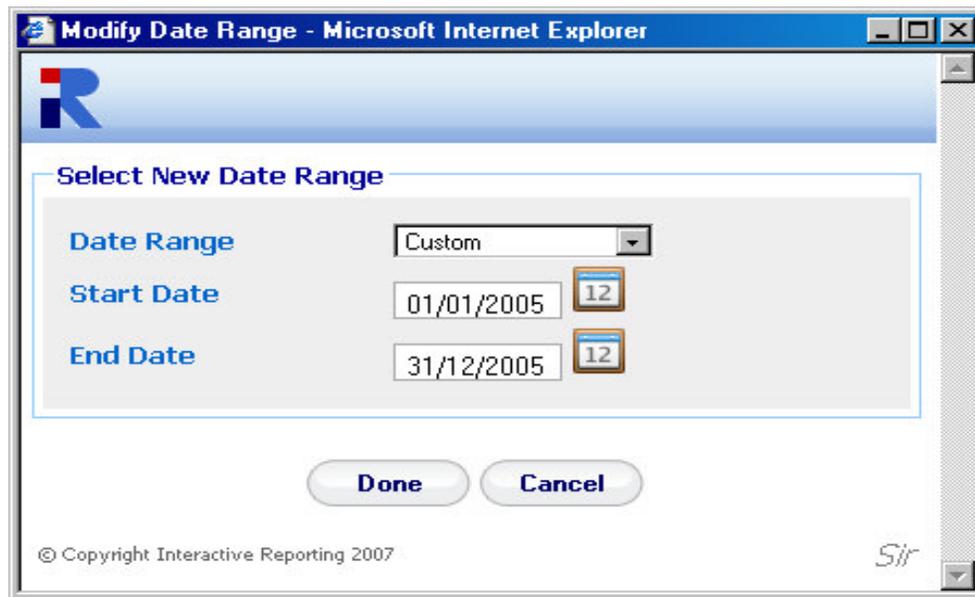


Figure 33

4.6 Report Results

The final and more important part of the page contains the data that the user wishes to view. In a standard report, these are displayed within a table, but they can readily be represented by a chart format. The data can be seen within a scrollable table or not, and they can be sorted in ascending or descending order, from within the table itself. This can be done by clicking on the table column header of the field the user wishes to order by. In this case, a blue arrow appears next to the column heading, to indicate the sort order. In addition if a table contains too many columns the user can freeze the

textual columns, so that when scrolling horizontally there is always a point of reference as to which data the user sees.

4.7 Grouping

When looking at a particular report, one can choose to group the results following a particular categorization. As an example, Figure 34 shows a report on *Sales by Quarter* grouped by *Sales Rep*. We can see that a grouped report produces subtotals of the quantities of interest for each of the sales representatives. One may change the grouping variable or revert to the simpler analysis given earlier by selecting as appropriate from the 'Group by' dropdown.

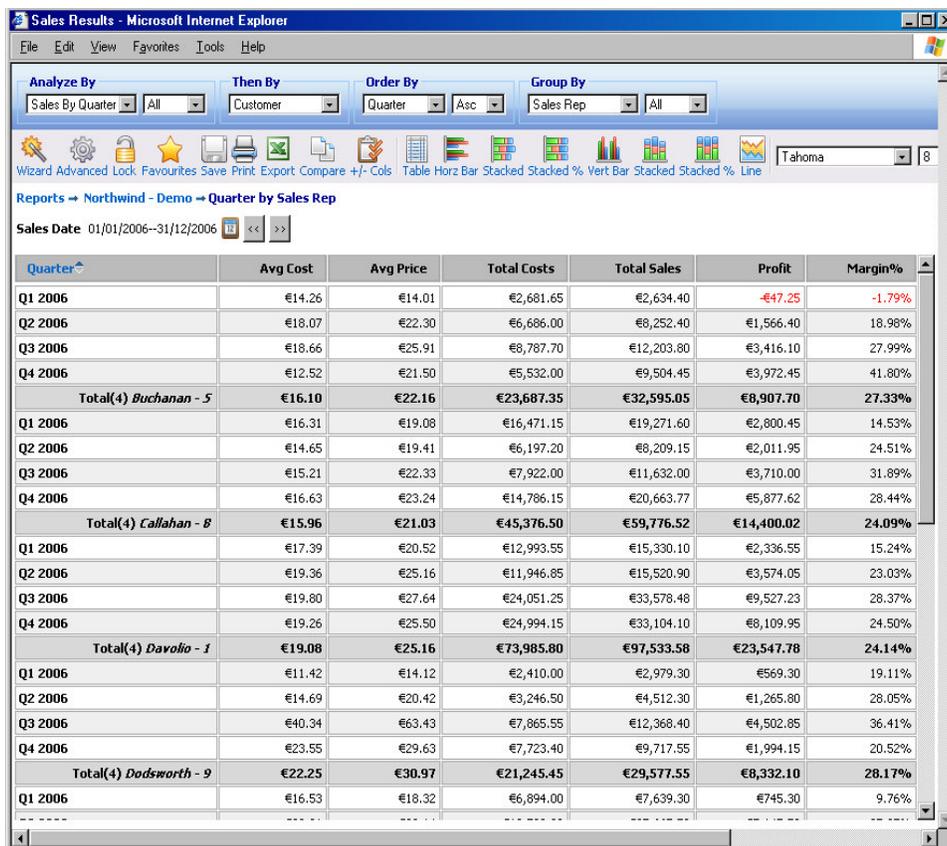


Figure 34

4.8 Pivot Report

A typical 'Pivot' report looks like the one shown in Figure 35. To generate this report you can use either the wizard or the advanced interfaces, as described in the previous chapters, to view *Sales Rep* vs *Sales by Month* for the year 2005, and select to view all pivot quantities. The values for *Sales Rep* specify the rows of the pivot report, and the

values of *Sales by Month* specify its columns. The rows and columns may be interchanged by clicking the 'Switch' icon at the top left cell of the table.

Buttons for pivot reports are similar to the ones for a standard report, with the only difference appearing at which charting options are available for the pivot reports. Data may be horizontally and vertically charted and displayed in both stacked and group format. Pie charts are not available on pivots.

The navigation filters section of the report now displays the list of variables that have been selected for the pivot report. In the report of Figure 35, the display shows 'Total Sales, Profit, Margin%' since all pivot quantities have been selected for this particular report. The colour and size of the display fields matches the one used within a table as an indicator of which number in the table represents which variable. If only one pivot variable is selected, this formatting is dropped. The switch table format icon next to the pivot display quantities changes the layout of the pivot table between the one shown in Figure 35 in which the pivot data are shown vertically in one cell, and the one in which the data are displayed horizontally with each data value shown in its own individual cell, Figure 36.

From a pivot report, one may zoom-in to a greater level of detail in three different ways. You may click on a:

- **Row heading** – this will produce a simple report, which has been filtered to only include data from the row clicked. For example, clicking the row heading *King* of Figure 35 generates the standard report of Figure 37.
- **Column heading** - this will produce a simple report, which has been filtered to only include data from the column clicked. To view such a report the user must click the red arrow that appears by the column heading value. For example, clicking the red arrow by the column heading *May 2005* of Figure 35 generates the standard report of Figure 38.
- **Data figure** – this will produce a simple report filtered to include only those data that contribute to this particular figure, i.e. filtered to include data from both the relevant row and column. Clicking a data value from within the table results produces such a report. For example, clicking the *total sales* figure for *Callahan* and *Nov 2005* of the report of Figure 35 generates the standard report of Figure 39.

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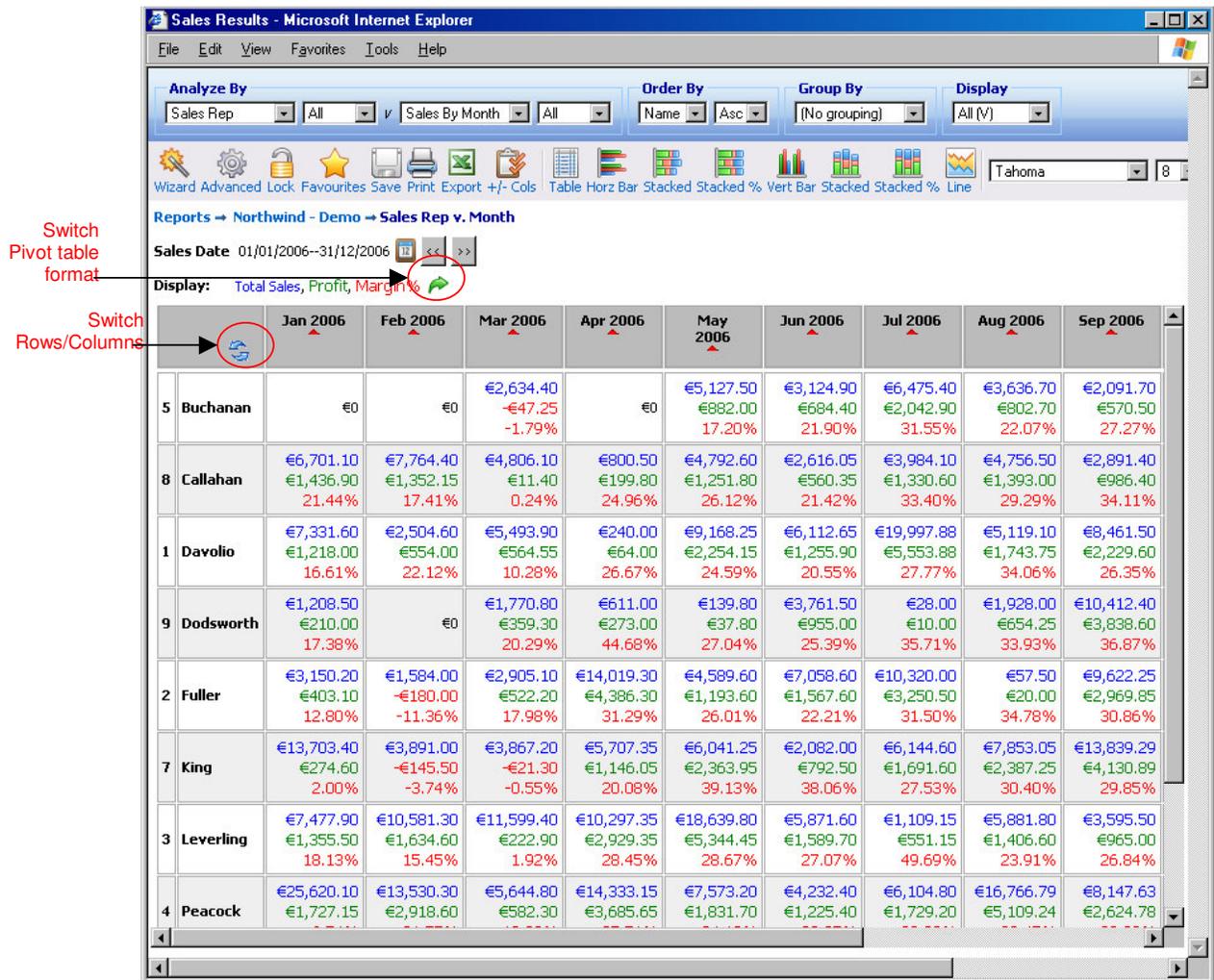


Figure 35

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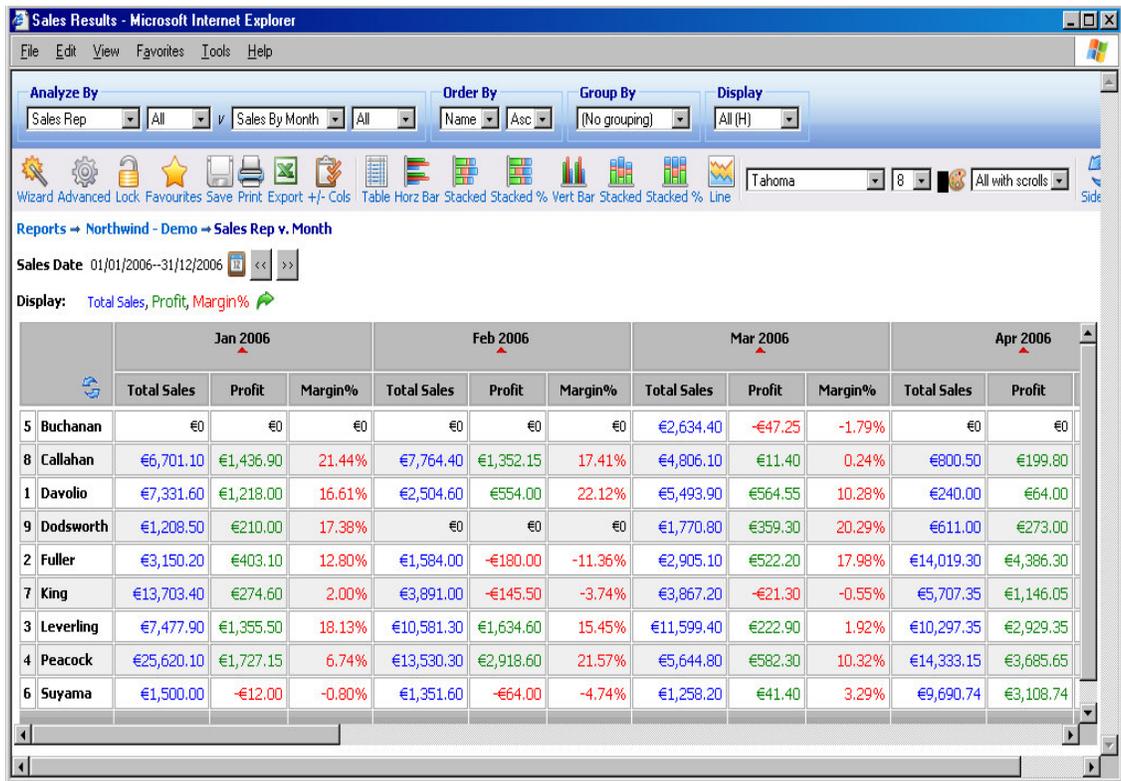


Figure 36

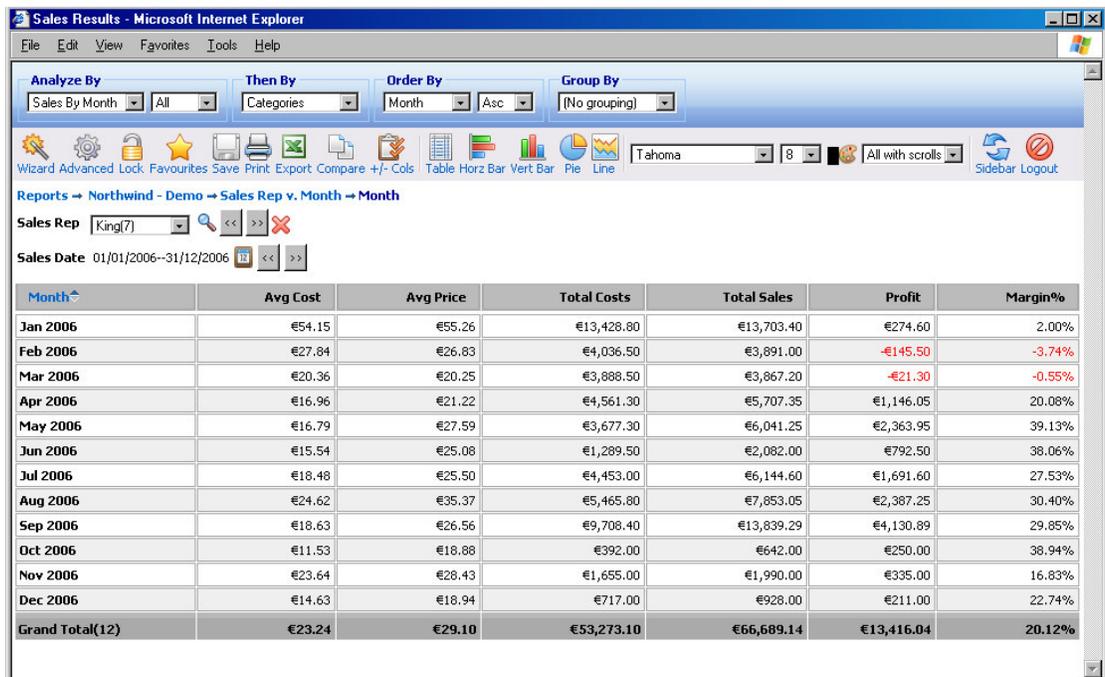


Figure 37

INTERACTIVE REPORTING USER'S GUIDE

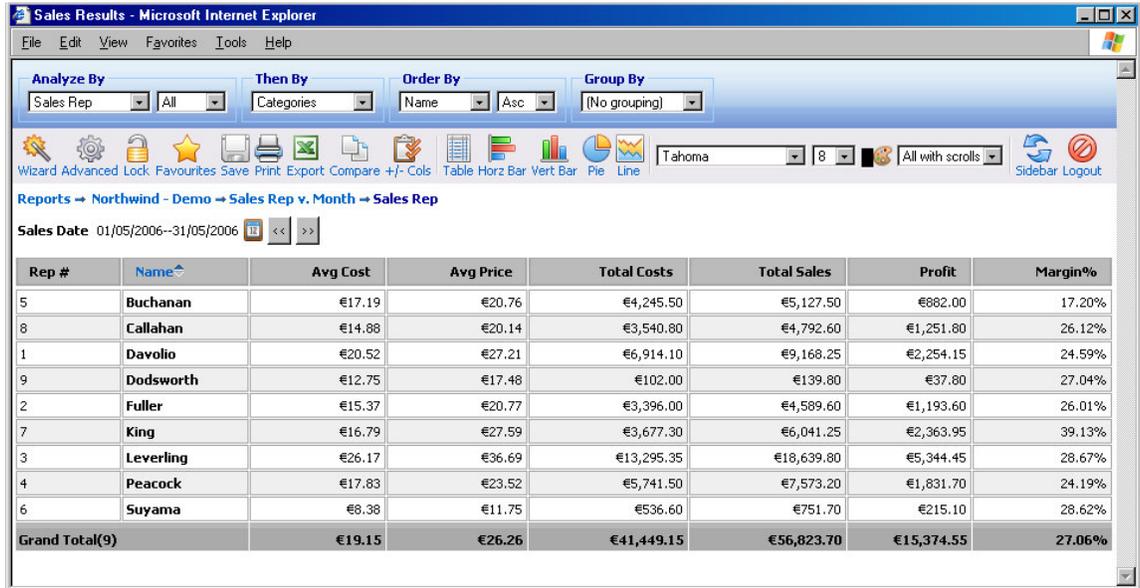


Figure 38

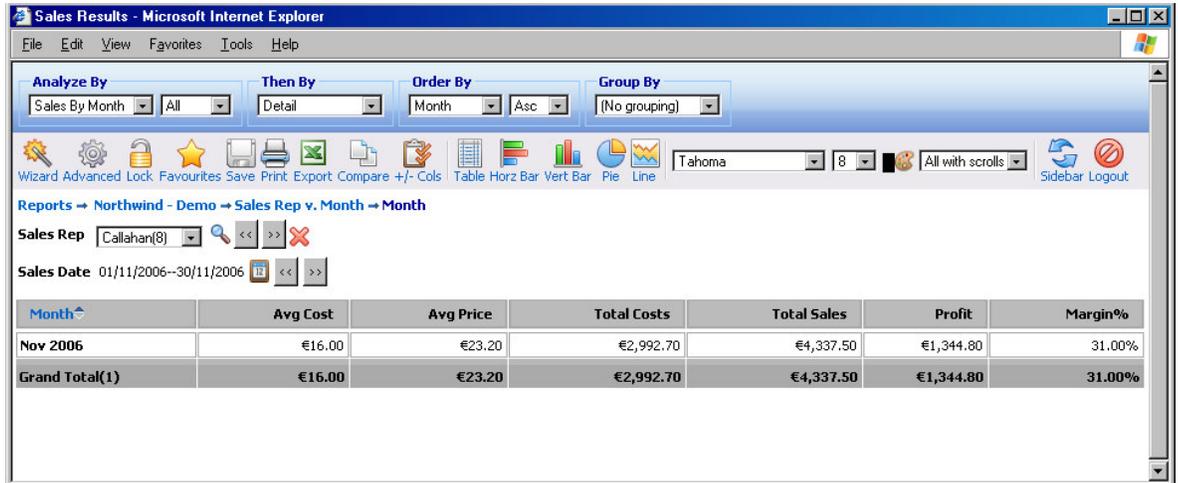


Figure 39

4.9 Chart Report

One of **INTERACTIVE REPORTING** most powerful features is its ability to provide interactive charts of data. When performing straightforward 1-D analyses (as described earlier), one may zoom-in to the next level of detail by clicking on a link. This unique feature is also available through charts.

A typical 'Chart' report looks like the one shown in Figure 40. To generate this report you can use either the wizard or the advanced interfaces, as described in the previous chapters, to view *Sales by Quarter* as a horizontal chart bar for the year 2005, and select to view *Total Sales*.

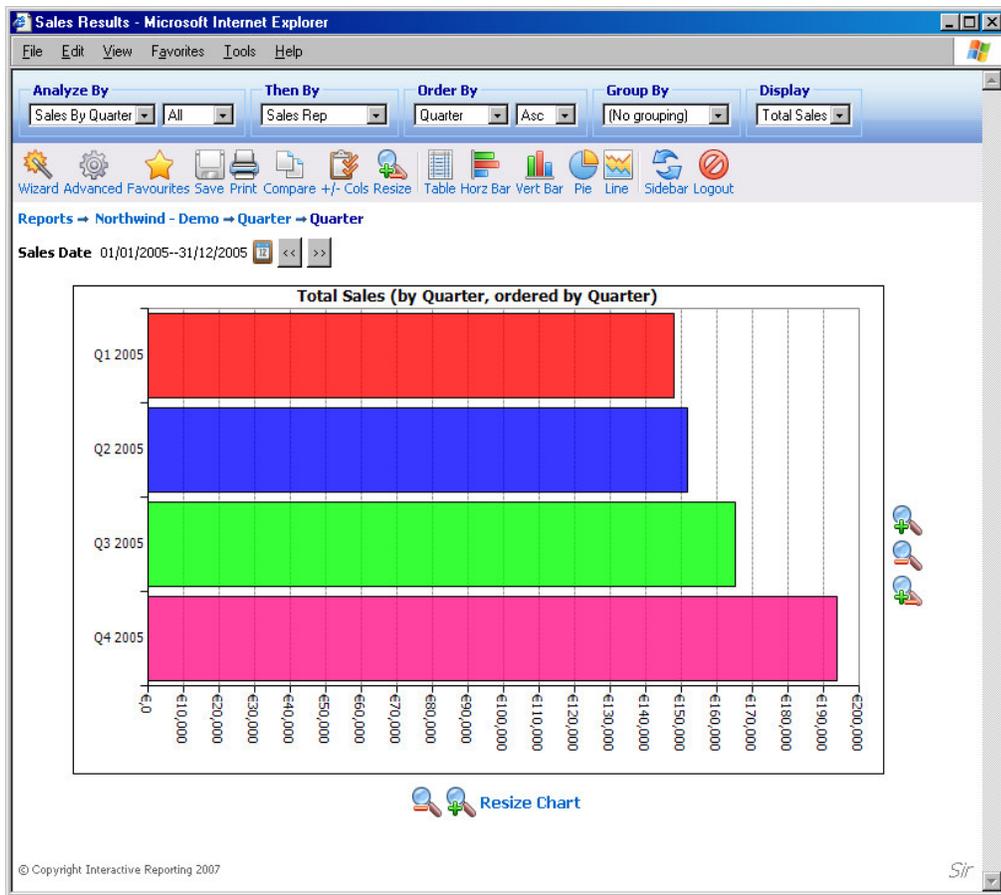


Figure 40

The chart reports functionality buttons provide one more configuration option, mainly the ability to modify the size of the chart to adjust it to the browser's dimensions. To achieve this click the **'Resize'** button. A new page, 41, opens and the user can then

select the width and/or height of their choice. Or they can simply select to fit the chart into their browser's screen size. When finished with the size adjustment simply click the **'Done'** button to return to the report page where the chart with the new dimensions is displayed. Similar options are available at the sides of the chart reports, which either enlarge or reduce the size of the chart by a predefined amount along a specific dimension or resize the chart according to the user's will.

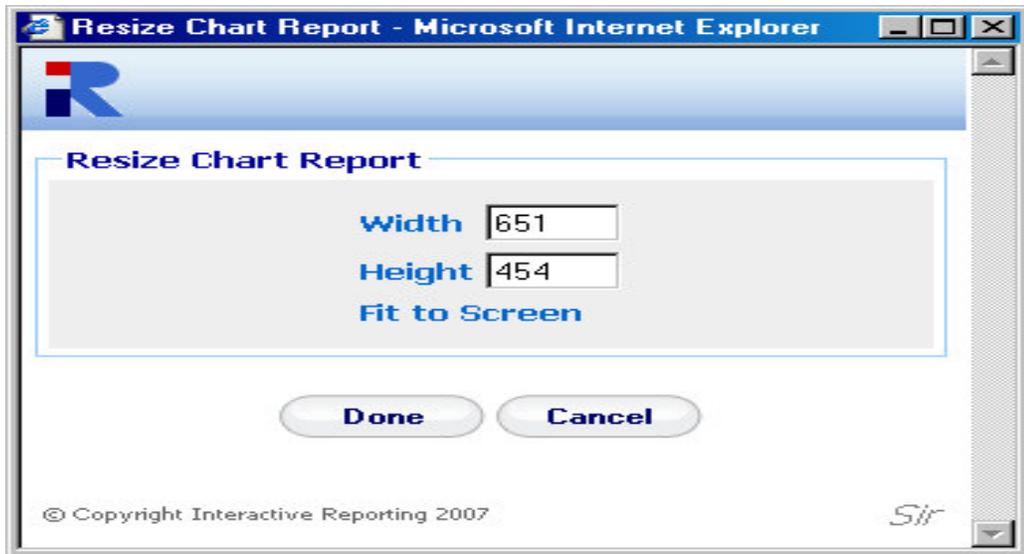


Figure 41

Just as tables allow drill-down, so do charts. For example, clicking on the bar associated with the 'Q2, 2005' volume, will give a bar-chart of each sales rep.'s performance during that quarter (similarly to zooming-in with the tabular **'Analyze'** report), shown in Figure 42. As before, one may recursively drill-down until the greatest level of granularity is attained.

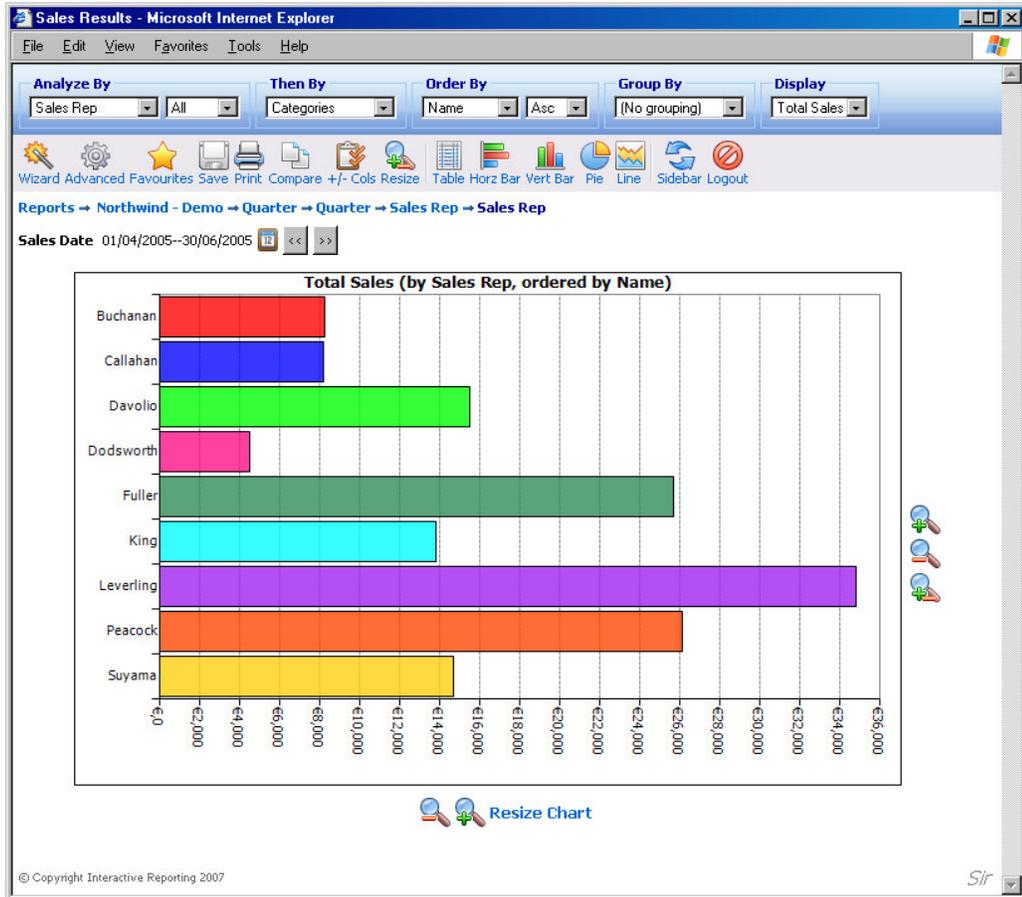


Figure 42

Just as one can group the results of a simple tabular analysis, one can also produce corresponding grouped charts. One simply changes the 'Group by' dropdown from 'No Grouping' to the desired grouping. There are several ways in which the data may be grouped within the chart. One may produce grouped, stacked or stacked -% versions of the bar charts. Clicking on the 'Switch' icon alternates the displayed and the grouping by fields. A grouped chart looks like the one shown in Figure 43. The stacked version of the same report appears at Figure 44.

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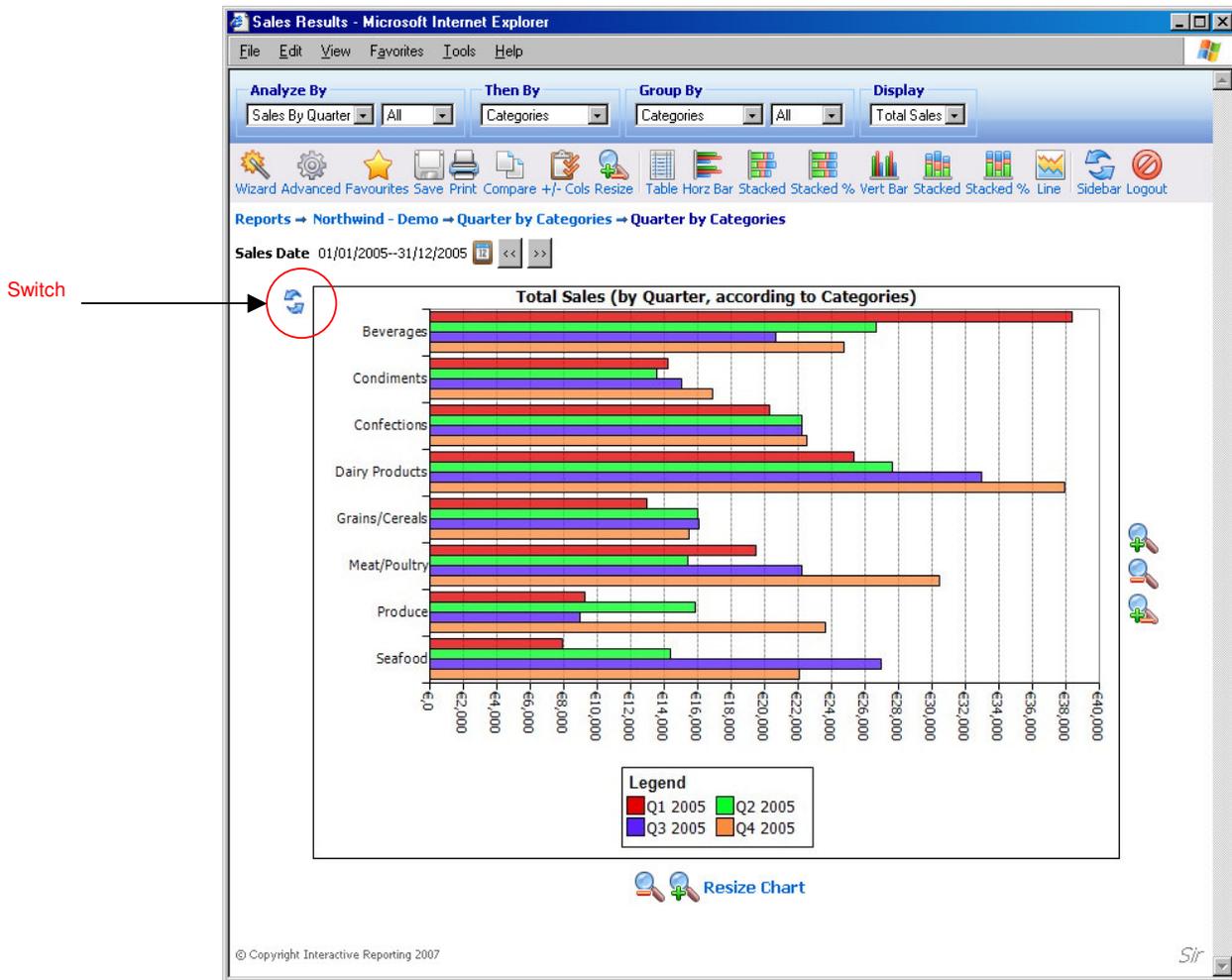


Figure 43

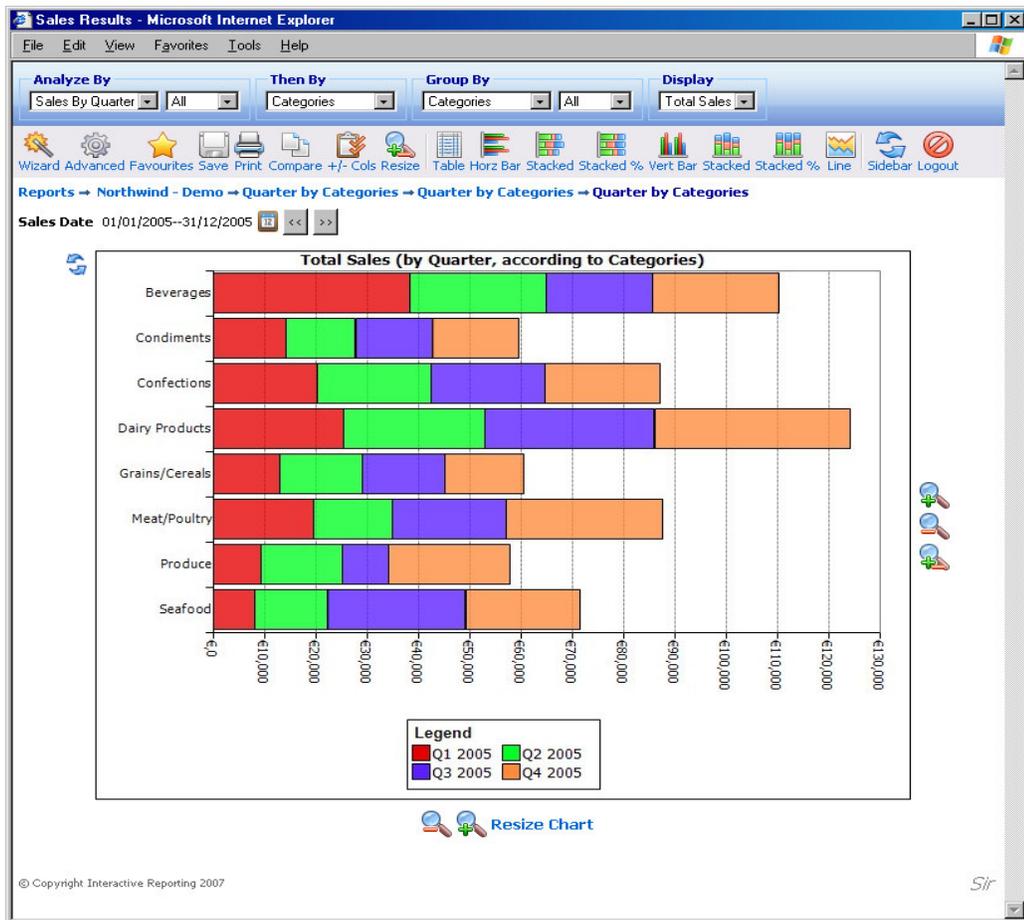


Figure 44

As with charts of simple reports, one may click on a quantity of interest to view a more detailed chart of that quantity.

4.10 Comparison Report

Another potent option that Interactive Reporting offers is its ability to compare data across different time periods. A typical 'Comparison' report looks like the one shown in Figure 45. To generate this report you can use either the wizard or the advanced interfaces, as described in the previous chapters, to compare Sales Rep data between the first and the second quarter of 2006.

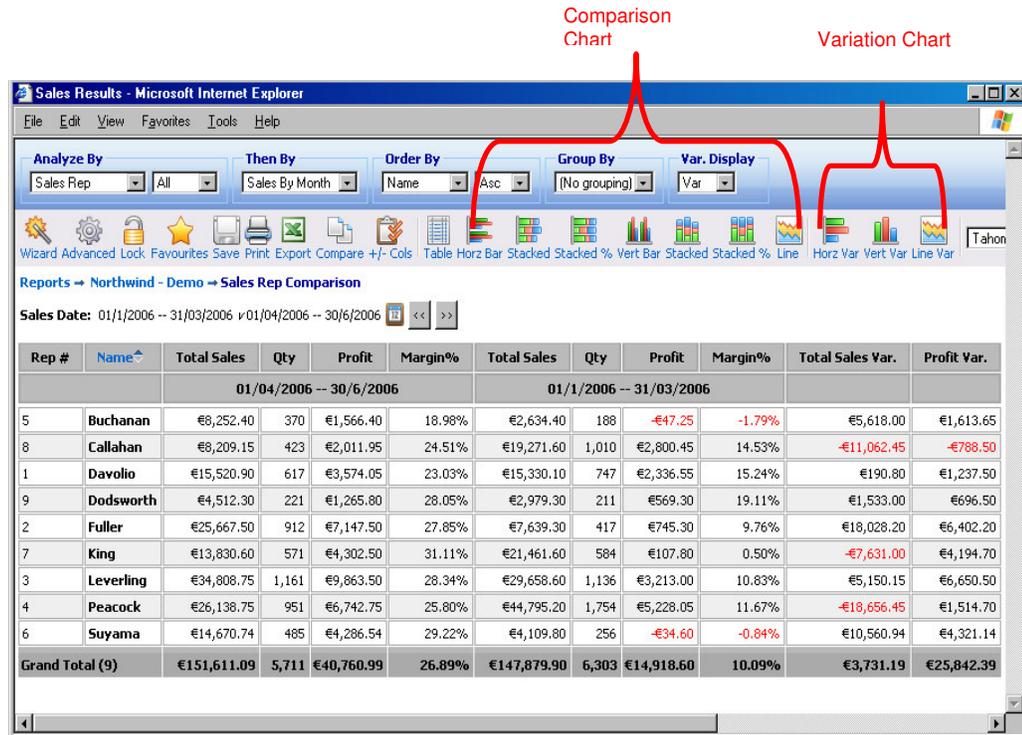


Figure 45

To view a comparison report as a chart the user must click on any of the comparison chart buttons. Changing the format of the comparison report of Figure 45 to chart will generate Figure 46. It is also possible to view chart reports of any variation field present, for example *Total Sales Var.* of Figure 45, by clicking any variation chart button. Such a report is shown in Figure 47.

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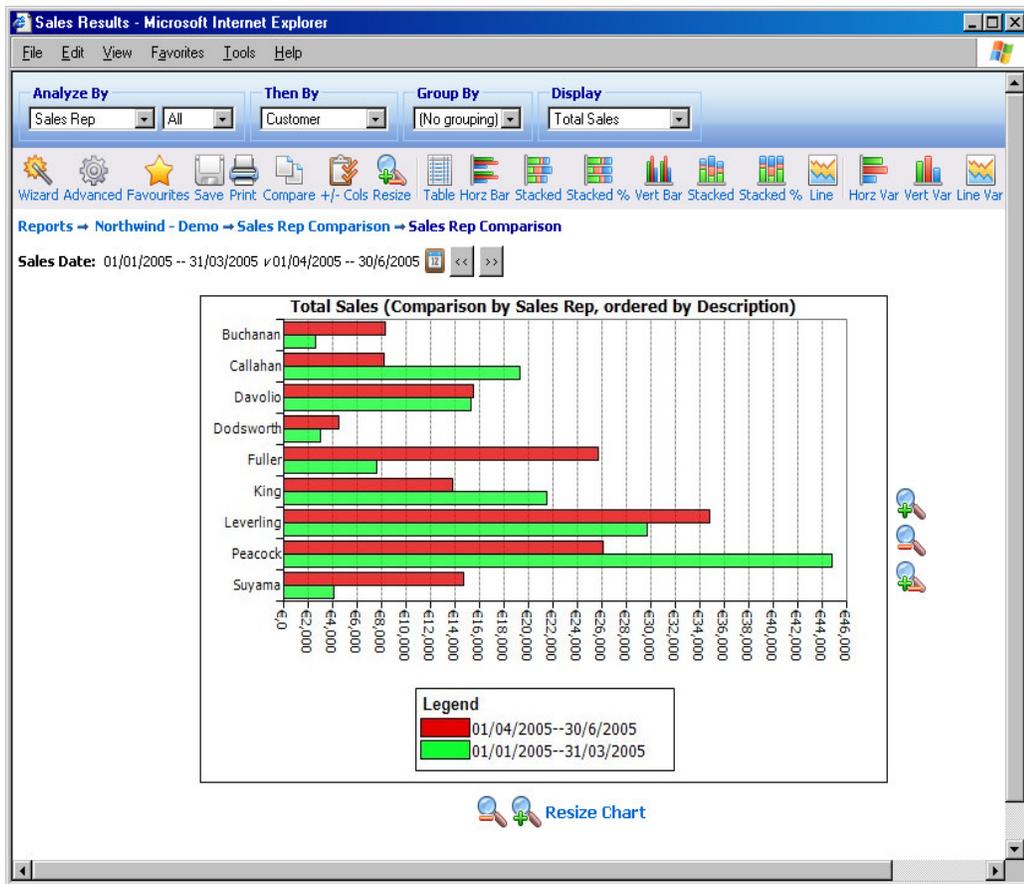


Figure 46

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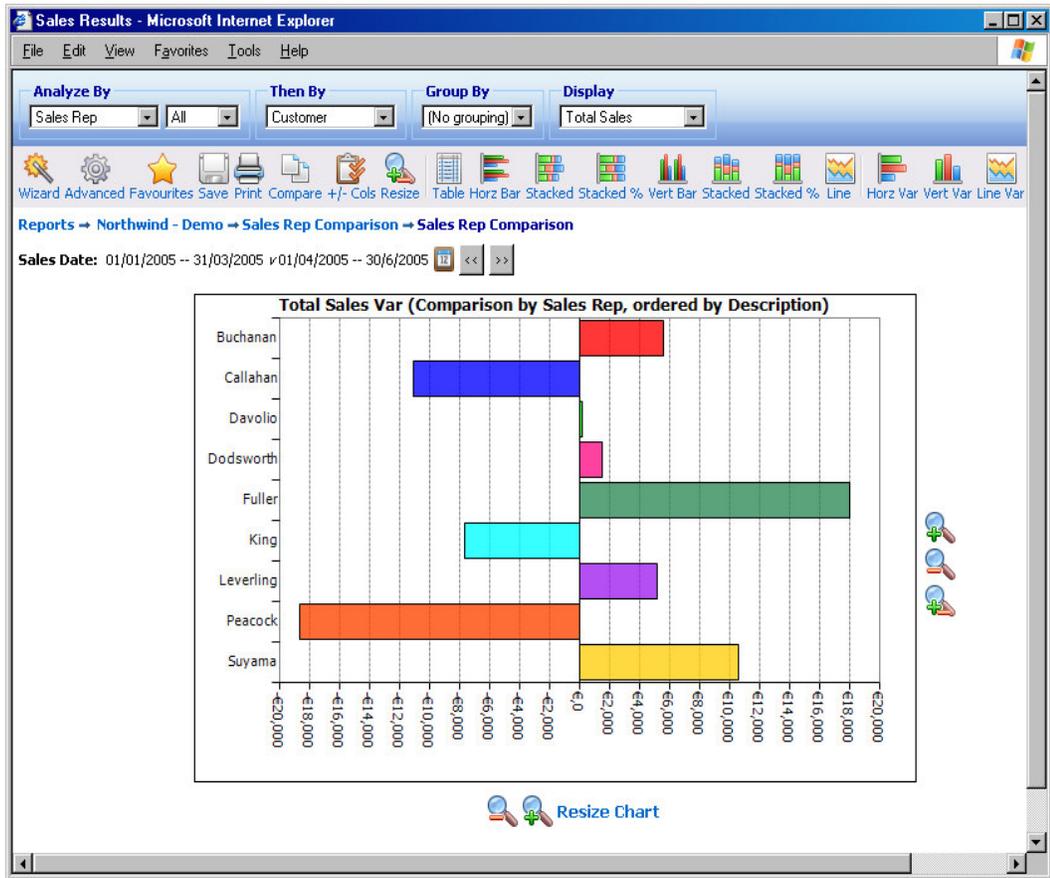


Figure 47

Getting Help

What to Do if You're Lost...

For any problem that you're unable to resolve using this manual, particularly if you are having problems signing-in or if you feel that data that should be available is not visible, your principal resource should be your system administrator.

Alternatively, you can look for assistance from the 'Support' section of INTERACTIVE REPORTING'S web-site:

<http://www.interactivereporting.com>

or simply e-mail your query to:

support@interactivereporting.com