January 2022

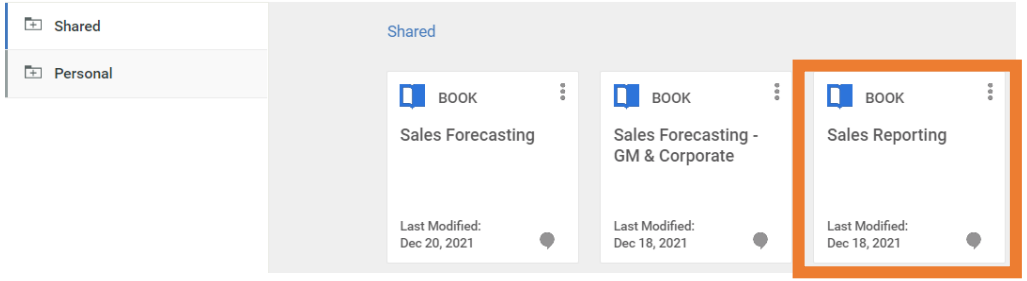
Advanced Reporting in TM1

EMEA Sales Operations Team

illumina®

Sales Reporting Book

- Advanced reporting activities can be performed in the different tabs of the Sales Reporting book



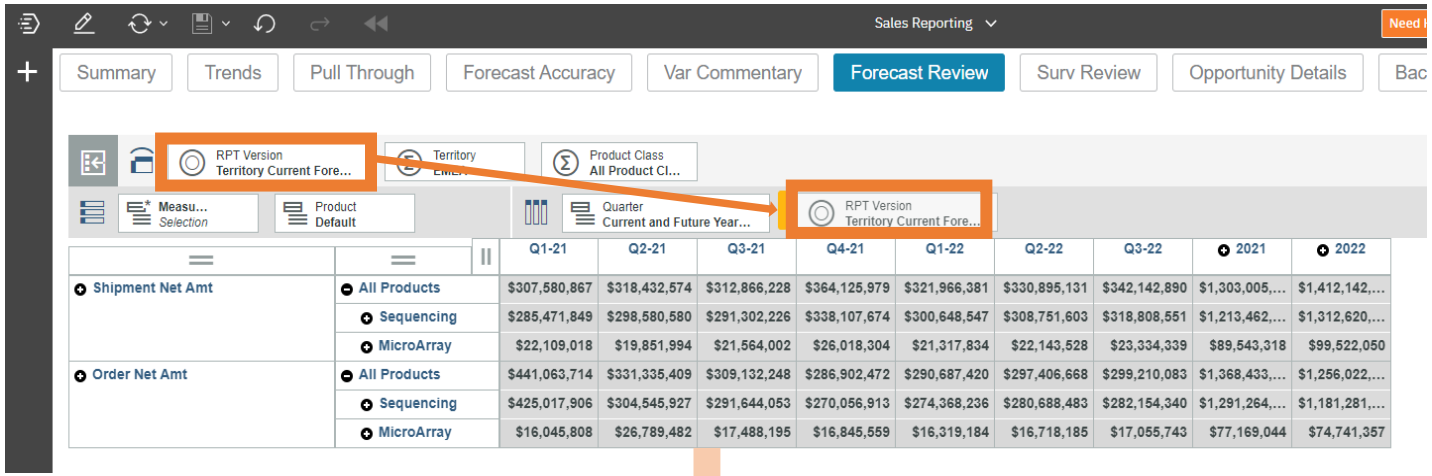
- For example, users have the possibility to:
  - Restructure rows and columns
  - Add calculations
  - Add conditional formatting

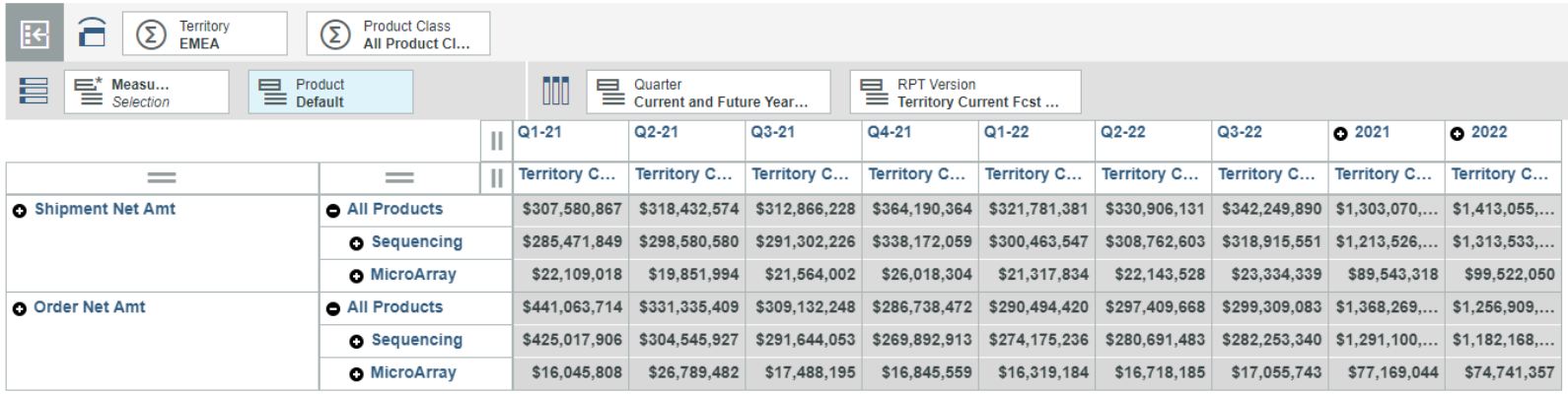
illumina®

Restructuring a table

Drag the dimension boxes to organize your view

For example, moving RPT Version from the top section (filters) to the right column area, will make RPT Version a column instead of a filter



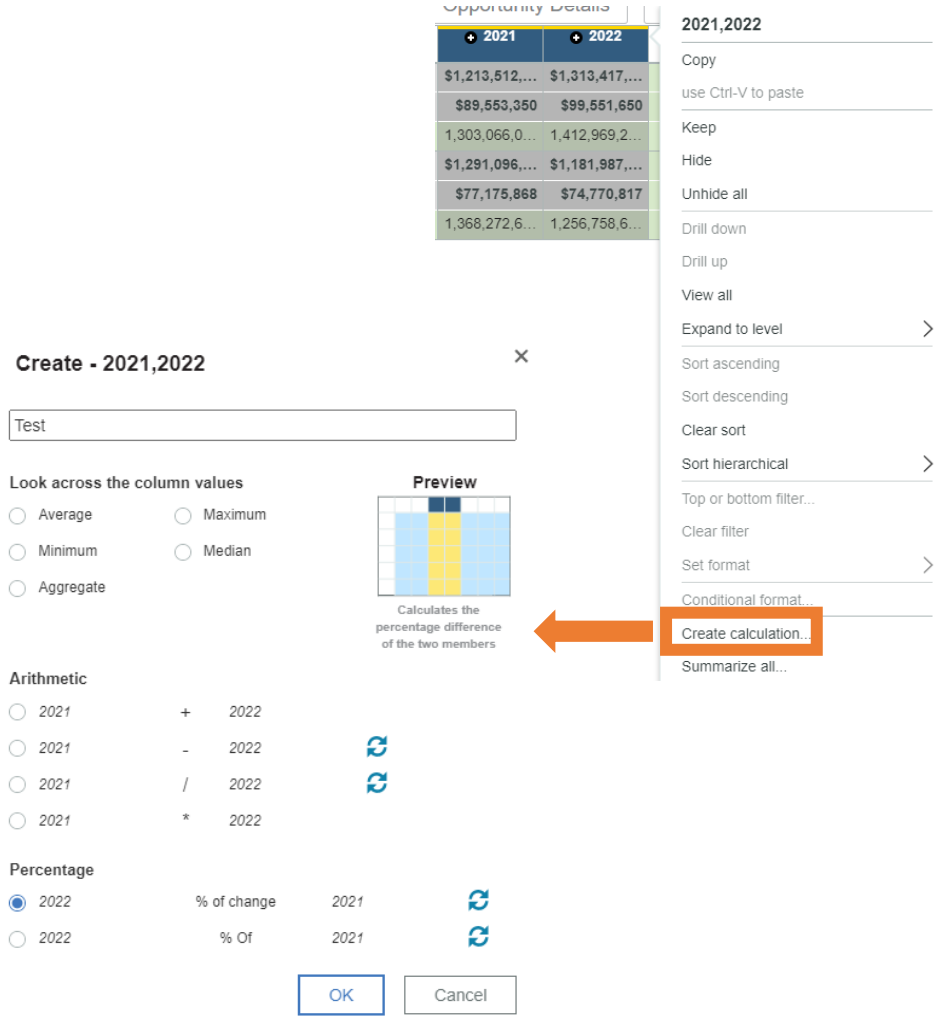


illumina®

Creating a Calculated Field

- Click on the two dimensions that you would like to calculate
- Right click and select ‘Create Calculation’
- Name your Calculation
- Select your ‘Calculation Type’
  - Look across the common values
  - Arithmetic
  - Percentage

  Tip: If doing a % change formula, select the later QTR first to calculate for example, Q3-21 % change of Q2-21
- Make selection and click ‘Ok’
- This will create a new column or row
- Move the position of your calculation by editing the set and right click on, for example, ‘Move to Top’

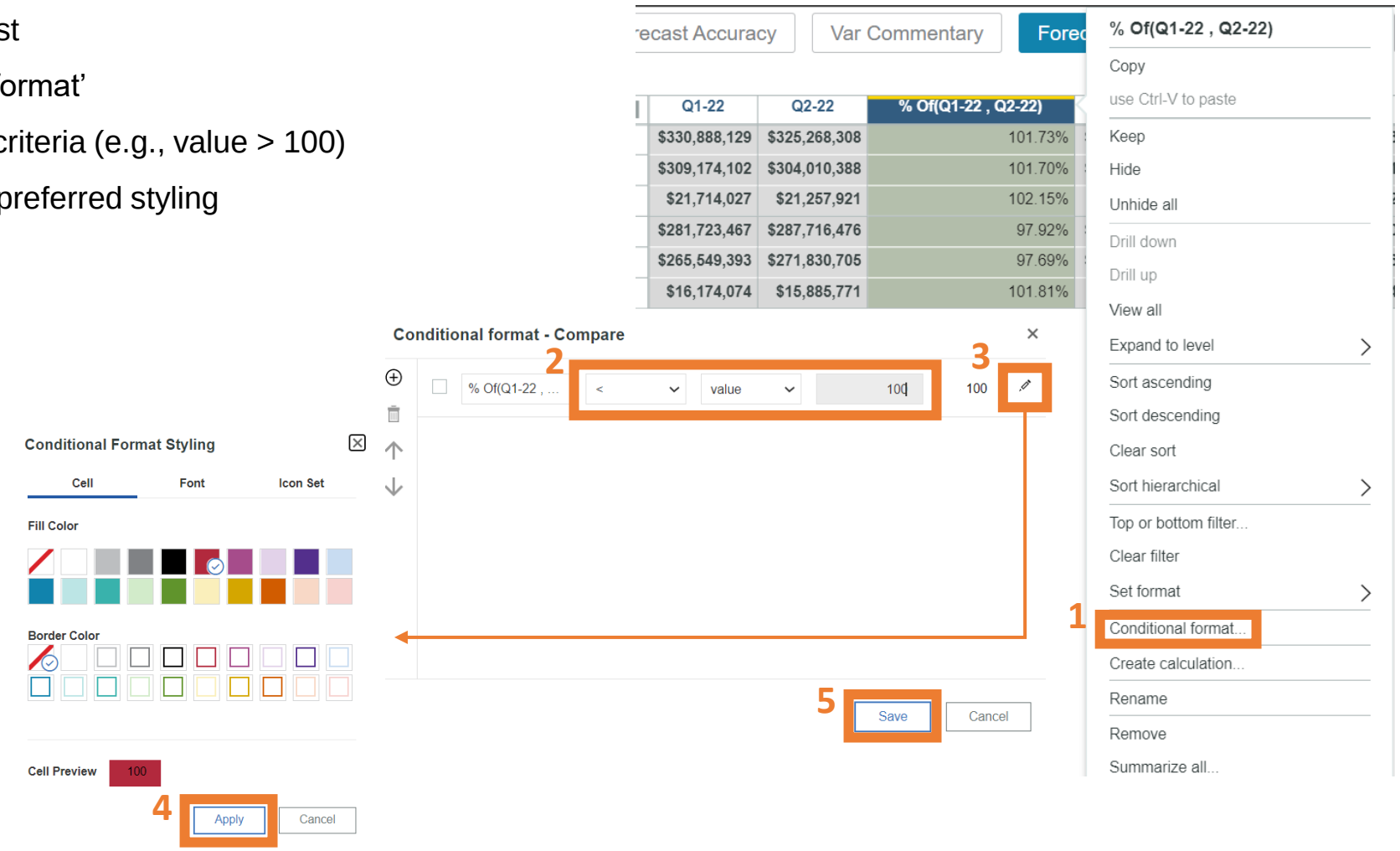


illumina®

Conditional Formatting

- Select the column/row of your interest

1. Right click and select ‘Conditional format’
2. In the pop-up window, define your criteria (e.g., value > 100)
3. Click the pencil icon to select your preferred styling
4. Click ‘Apply’
5. Click ‘Save’

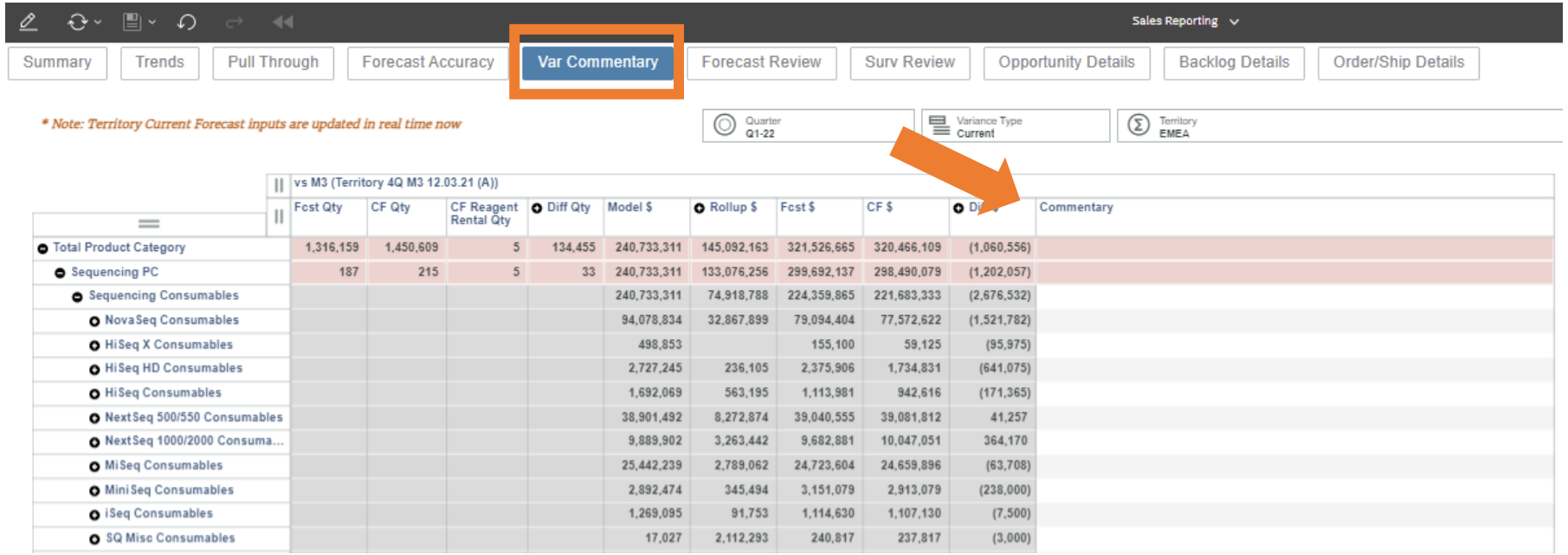


illumina®

Available
Variance & Trend Reports

Variance Commentary

- The Variance Commentary tab can be found in the Sales Reporting book
- It is used to capture any commentary related to adjustments that were made against the prior forecast cycle
- For example, if you need to adjust up/down by $100k for NovaSeq consumables, you might need to indicate at product level which customer(s) drive this change
- Driving factors for changes to the forecast are important to senior leadership



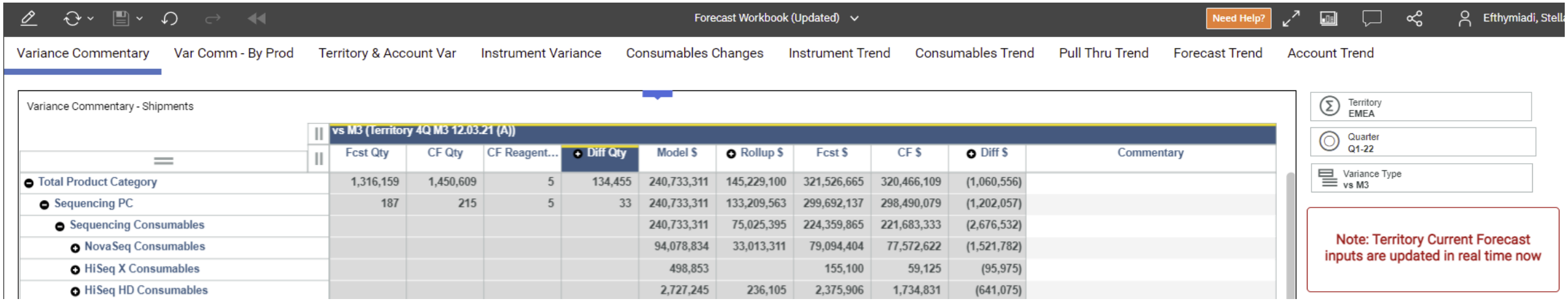
	Fcst Qty	CF Qty	CF Reagent Rental Qty	Diff Qty	Model $	Rollup $	Fcst $	CF $	Diff	Commentary
Total Product Category	1,316,159	1,450,609	5	134,455	240,733,311	145,092,163	321,526,665	320,466,109	(1,060,556)	
Sequencing PC	187	215	5	33	240,733,311	133,076,256	299,692,137	298,490,079	(1,202,057)	
Sequencing Consumables					240,733,311	74,918,788	224,359,865	221,683,333	(2,676,532)	
NovaSeq Consumables					94,078,834	32,867,899	79,094,404	77,572,622	(1,521,782)	
HiSeq X Consumables					498,853		155,100	59,125	(95,975)	
HiSeq HD Consumables					2,727,245	236,105	2,375,906	1,734,831	(641,075)	
HiSeq Consumables					1,692,069	563,195	1,113,981	942,616	(171,365)	
NextSeq 500/550 Consumables					38,901,492	8,272,874	39,040,555	39,081,812	41,257	
NextSeq 1000/2000 Consuma...					9,889,902	3,263,442	9,682,881	10,047,051	364,170	
MiSeq Consumables					25,442,239	2,789,062	24,723,604	24,659,896	(63,708)	
MiniSeq Consumables					2,892,474	345,494	3,151,079	2,913,079	(238,000)	
iSeq Consumables					1,269,095	91,753	1,114,630	1,107,130	(7,500)	
SQ Misc Consumables					17,027	2,112,293	240,817	237,817	(3,000)	

Reporting on Variances & Trends

- The ‘Forecast Workbook (Updated)’ can be found in the ‘Sales Shared Views – AMR’
- This workbook allows you to review forecast variances across multiple criteria and review trends
- It includes a navigation bar at the top so you can select from the various reports as well as specific filters (e.g., territory, quarter, variance type,etc.) on the right side

Definitions:

- CF Qty / CF $: Current Forecast Input Quantity and $ Value
- Fcst Qty / Fcst $: Forecasted Quantity and $ Value
- Diff Qty / Diff $: Forecast Input Adjustment Quantity and $ Value



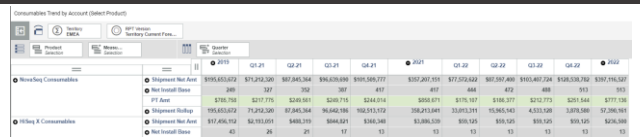
	Fcst Qty	CF Qty	CF Reagent...	Diff Qty	Model $	Rollup $	Fcst $	CF $	Diff $	Commentary
Total Product Category	1,316,159	1,450,609	5	134,455	240,733,311	145,229,100	321,526,665	320,466,109	(1,060,556)	
Sequencing PC	187	215	5	33	240,733,311	133,209,563	299,692,137	298,490,079	(1,202,057)	
Sequencing Consumables					240,733,311	75,025,395	224,359,865	221,683,333	(2,676,532)	
NovaSeq Consumables					94,078,834	33,013,311	79,094,404	77,572,622	(1,521,782)	
HiSeq X Consumables					498,853		155,100	59,125	(95,975)	
HiSeq HD Consumables					2,727,245	236,105	2,375,906	1,734,831	(641,075)	

Variance/Trend Report Descriptions

Variance Reports

Variance Commentary	• Captures any commentary related to adjustments that were made against the prior forecast cycle
Var Comm – By Prod	• Consolidated view of forecast input and variance commentaries across product categories by territory
Territory & Account Var	• Consolidated view of forecast input and variance commentaries across product systems by territory
Instrument Variance	• Consolidated view of forecast input and variance commentaries at instrument level for a territory
Consumables Changes	• Consolidated view of forecast input and variance commentaries at consumables level for a territory

Trend Reports



Instrument Trend	• Provides shipment quantity trends by platform and YoY % Growth
Consumables Trend	• Provides shipment value trends by sequencing consumables and YoY % Growth
Pull Thru Trend	• Provides pull through amount by platform
Forecast Trend	• Focuses on the total product category for an overall review of trends in a territory
Account Trend	• Summarizes current and future forecast by Key Accounts & Other Account buckets

Need Help?

Contact salesops_EMEA@illumina.com

illumina®