User Guide
SavvyPack® System
SpyGlass Knowledgebase

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Section I
User Guide – Knowledgebases

Section I:
User Guide for SpyGlass™ Market Knowledgebases

A. Introduction

The instructions are organized by the screens that are available in SpyGlass™ Knowledgebases ("KB") and by the functions available within these screens:

1. Global manager screen

The Global Manager screen is the entry screen for the KB. It provides the:

1. ability to select and display public reports
2. ability to select and display proprietary reports
3. entry point to the tool box used to create report templates

2. Toolbox screen

The toolbox screen provides the ability to create and save new proprietary report templates. Once created, these templates are used on the global manager screen, where they are populated with data to form reports.

Detailed instructions are provided for each of these screens in the following paragraphs.

B. Global manager screen

The Global Manager screen has two main sections:

1. Select from Existing Reports (which has three sub-sections)
2. Report Creation and Modification Tools (which accesses the toolbox).

Functionality and the procedural steps for each section and sub-section are provided in the following paragraphs.

1. Select from Available Base Reports

The first sub-section **Select from Available Base Reports** is used to select from base (public) reports, which are sample reports available to all users, that have been created by SavvyPack® analysts. Public reports are controlled by SavvyPack® analysts, so users are not allowed to change them. However, users can copy these public report templates to their proprietary space, where they can change their copy of the templates. Users accomplish this by using the report toolbox, which is described later.

To select a base report, click on **Display Base Report** and a new window will open. In this window, select a base report and the window closes. Then click on the **Start a Base Report** button to view the selected base report.

2. Select from Client Report Groups

The second sub-section **Select from Client Report Groups** displays groups, if any, created by the user to group proprietary report templates together. If no groups have been created, a default group is displayed that contains all of the user's report templates.

3. Select from Proprietary Client Reports

The third sub-section **Select From Proprietary Client Reports** provides a list of the report templates created by the user. To use this function, the user first needs to create at least one report template, either from scratch or by copying a base report. Once reports are created, they can be opened by clicking the **Display Proprietary Report List** link. When the link is clicked, a new window will open, which will display all the proprietary report templates created. If a group is selected, all proprietary report templates will be displayed within that group. To view a report, click the desired report template and then click **Start Proprietary Report**.

There is also an option to rename the report in this section. To rename a report, choose the report you wish to rename from **Display Proprietary Report List** and click the Rename Button. A text box will appear where the user can enter the desired report name. After the name is entered, click the **Update** button to rename.

4. Report Creation and Modification Tools

The final section is used to access and use the report toolbox, which is examined in the following paragraphs.

The final section, but perhaps most important section, is the **Report Creation and Modification Tools** that has **Toolbox** as its sub-section. The **Toolbox** allows users to create different types of reports through "uniform" and "mixed" report options and allows users to modify, edit, copy, and delete the base reports. Once the user clicks the Toolbox Button, the **Market Analysis Tool** page is displayed.

C. Toolbox screen

The **Market Analysis Tool** page has two sections and the functionality of each section is described here. In each section, click on **Go to Toolbox** to display that sections toolbox functions.

1. Source Base Report section

The first section of the toolbox is **Source Base Report**. The functionality is this section provides users with the ability to create copies of the base reports in their proprietary space. To make a copy of any base report, click the **Display Base Report List** and a new window will open showing the list of all the base reports. Click on the report name for which a copy is to be created and then click the Copy button. A pop-up will ask for confirmation. Click OK to create a copy. Another pop-up will open displaying the new Report ID. The copied report will automatically appear in the users Proprietary report list.

2. Source Proprietary Reports section

The second section, **Source Proprietary Reports** has five functional buttons including Copy, Edit, Delete, Mixed Report Tool, and Uniform Report Tool. The functionality of each button is described next.

Copy button

The **Copy** function provides the user the ability to create a copy of the user's proprietary reports. To create a copy of any report template, click on **Display Proprietary Report List** and a new window will open. Select the report for which a copy is to be created and click copy. A pop-up will appear for confirmation. Click OK and another pop-up will appear confirming that a copy of the selected case was created. It will also display the identification number of the new report template.

Edit button

The **Edit** function provides the user the ability to edit/modify the existing reports. With the edit option, users can modify all the parameters in any proprietary report. To edit a report, click on **Display Proprietary Report List** and a new window will open. Select the report to be edited and click the edit button. Once the edit option is active, users can modify all the available options. This functionality also allows changing the number of filters as well as changing number of columns. Once the modifications are done, users need to first click the Submit button and then click the Save button to complete the changes. Users can see the modified report in their Proprietary report list on the Global Manager page.

Delete button

The **Delete** function provides the user the ability to delete a report. To delete a report, click on **Display Proprietary Report List** and a new window will open. Select the report to be deleted and click the delete button. A pop-up will appear for deletion confirmation, click OK to proceed. The selected report will be deleted and it will be confirmed by one more pop-up message.

Uniform Report Tool button

The **Uniform Report Tool** provides the user the ability to create reports with the same type of data (uniform data) in each row of the report; thus, the name uniform report tool. It is a powerful report tool with which users can generate many types of uniform reports quickly and efficiently. It should always be used to create report templates when the report will contain uniform data.

The **Uniform Report Tool** provides users will many built-in features that greatly assist the report building process such as the **Choose Units** options. The Choose Units selector provides an efficient way to select the metrics of interest. For example:

- for the number of packages or pack units user selects “packages”
- for weight of packages user selects “weight”
- for area of packages user selects “area”

The Choose Units selector can also be used for traditional non-packaging data series:

- for population user selects “number”
- for GDP user selects “currency”

Mixed Report Tool button

The **Mixed Report Tool** provides the user the ability to create reports which have varied data (mixed data) sets in rows. In the **Mixed Report Tool**, users can choose a different data series for each row. The **Mixed Reports Tool** is more flexible than the **Uniform Reports Tool**, but it takes more time to create a Mixed Report. More time is required because for Uniform Reports the rows are pre-populated based on user selections, but, in Mixed Reports, each row is created by the user.

To create a Mixed Report, click on the **Mixed Report Tool** button, enter the report name, number of rows required, number of columns required, number of filters required, and click submit to generate the report template. Next, click on Filter options to choose the dataset, and click on Column options to choose the years of interest. The Column options also include CAGR between any two years.

D. Step-by-step instructions for creating select reports

Step-by-step instructions are provided for creating several types of reports in the following paragraphs. The potential permutations for reports is nearly unlimited, so the sample reports chosen for these instructions were selected based on high demand.

1. Report by region set

A report segmented by geographic region is one of the most commonly required reports, and it is very easy to create reports by geographic region set using the Uniform Report Tool. The configuration of this report lists the regions in rows and years/CAGR in the columns. The reports can display pack units, pack area, weight, and value as well as population, GDP, and many others.

Here are the step-by-step instructions to create a **Uniform Report** that will display number of packages by region set for three years with the corresponding CAGR values calculated.

First, click on the **Uniform Report Tool** button. A simple template with multiple options will appear. First, type a report name (by default the Report Name is set as Test Report). Users should change it to their preferred report name. Next, select the Report Type, **Create Report By Region Set**. The third option is pre-selected to a subscribed region set, therefore go to next option to select the units, for this report select 'packages' from drop-down menu. Choose five report columns and two report filters and click the submit button. A template is created, next click on Filter 1 and a pop-up will appear. Choose the product type in first option and then select the product in next option. Similarly, click on Filter 2 to choose the package option and select the package type. In three columns, choose the years for which data needs to be displayed and then select the CAGR in the other two columns. Click the Save button and a pop-up will appear confirming that the report is created. Next, to view this report, return to the Global Manager screen and click on **Display Proprietary Report List**. Click on the report name and then click on **Start Proprietary Report**. A new window will display the report.

2. **Report by country**

A **Report By Country** displays the data on a country level instead of on a region level. To create a report by country, click on **Uniform Report Tool** and rename the report. Next, select **Create Report By Country** in the **Report Type Selector**. Choose the region for which data by country is needed (by default the "all" countries option is selected). Choose the units from the select units drop down and then select the number of columns required. Click the Submit button and all the countries will be displayed in the template. Choose the options in the Filters for rows and then select the years/CAGR for the columns. Click the Save button and a message will appear confirming report creation. To view this report, go to Global Manager and click on **Display Proprietary Report List**. Next, click on the report name and then click on **Start Proprietary Report**. The new window will display the report.

3. **Report by product**

A **Report By Product** displays the data based on product names. The rows display the names of products depending on the filter chosen by the user.

To create a report by product, click on the **Uniform Report Tool** button, rename the report and then choose **Create Report By Product** in the report type option. Next, select the unit of your choice and then choose the number of filters and columns, then click on Submit. After the user chooses the filter options (package/Country/Region etc) and column years, click on Submit and then click on the Save button. A message will appear confirming report creation. To view this report, go to the Global Manager and click on **Display Proprietary Report List**. Next, click on the report name and then click on **Start Proprietary Report**. The new window will display the report.

4. Report by material

A **Report by Material** provides the materials used in packages measured on a weight basis. Weight is displayed in either English (lb) or metric (kg) units.

To create a report by material, click on the **Uniform Report Tool** button, rename the report and then choose **Create Report by Material** in the report type option. Next, select the weight option in select units drop-down, then choose the number of filters and columns, and click the “Submit” button. After the user chooses the filter options (product/package/Country/ Region etc...) and column years, click on Submit and then click on the Save button. A message will appear confirming report creation. To view this report, go to the Global Manager and click on **Display Proprietary Report List**. Next, click on the report name and then click on **Start Proprietary Report**. A new window will display the report.

5. Report by package

A **Report by Package** displays the data based on package types. The rows display the names of different types of packages depending on the filter chosen by the user.

To create a report by package, click on the **Uniform Report Tool** button, rename the report, and then choose **Create Report by Package** in the report type option. Next, select the unit of interest, then choose the number of filters and columns, and then click on Submit. After selecting the filter options (product/Country/ Region etc...) and column years, click on Submit, and then click on the Save button. A message will appear confirming report creation. To view this report, go to the Global Manager and click on **Display Proprietary Report List**, click on the report name and click on **Start Proprietary Report**. A new window will display the report.

6. Unit conversion

It is easy to switch between English and Metric units for reports such as those that have data for weight or area.

To view any report in your choice of units, go to the Global Manager and click on **Display Proprietary Report List**. Click on the report of interest, then click on **Start Proprietary Report**. When the report is displayed, there will be a **Preferences** link right above the **Actual** radio button. Click on the **Preferences** link and a new window will open. Choose the preferred units (English or Metric) and click the Update Button. Close this window and go back to the report window. In the report window, click the Update Button and the values and units of your choice will be displayed.

7. Decimal place

It is also easy to view data in Actual, Thousands, Millions and Billions: To view the report data in different unit numbers, there is a facility in system to view the data in Actual, Thousands, Millions and Billions. On all the reports you can choose from these four options, by default **Actual** option is active. To view the report in Thousands, Millions and Billions, click on the radio button and the page will auto refresh to load the selected number format.

Section II
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