CLS Data Portal User Reference Guide

A guide to regional quarterly reporting data entry webpage

# Contents

Overview

The new data portal allows easy entry of data, commentary, and future action. The system will use period filter, hierarchy ID, and measure ID to identify a unique measurement and write the value of that measurement into database. With built-in calculation engine, rollup figures will be automatically calculated. Besides, the database is link to tableau, which can generate and update quarterly review dashboards. Please enter the data at its lowest level that it is captured. If the system is missing any country or cluster, please contact Mike Fowler. The data entry portal will be open during the data entry period after each quarter closes (C+12). Data is due in C+10, and comments are due in C+12. If any changes need to be made after that time period, please contact Mike Fowler or Joe McGinnis. If you have any questions about the upload process or the website, please contact Mike Fowler (mfowler5@its.jnj.com) or Joe McGinnis (jmcginn6@its.jnj.com) for assistance.

Sign In

Open http://itsusrawsp01436:90/ with browser (Google Chrome or IE 9.0 or higher) and sign in with J&J network credential.
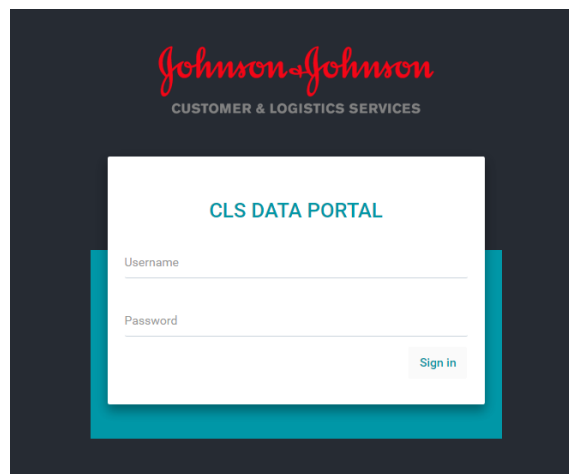
The main menu contains three tabs:

1. Measure Data – to edit or view data, explanations, and actions
2. Data Imports – to import data files
3. Tableau Dashboard – to view dashboards

Click to hide the menu on the left.

"Help" and "Logout"

Menu bar

Hover over to view username & last update time.

Refresh and select data type.

Current filter

Click to edit the filter

Type to search

To sort

Data Entry

There are two ways to enter data. Direct input method requires users to manually enter data one at a time on the webpage. Data file import allows users to upload 2000+ rows of data all at once.

Direct Input

1. Click "**Measure Data**" in the menu bar.
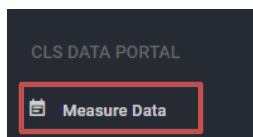
2. Click "**Filter**" to select regions, measurements, and time period. Click "**Apply**" to save the changes.

| Filters | ✔ APPLY | ← CANCEL | | Apply filter |

Intervals
Quarterly → Select interval

Year | **Quarter**
2016 ▼ | Q1: Jan 4, 2016 to Apr 3, 2016 ← Select year and period

Measure Type
Perfect Order → Select measure type

Hierarchy: Global

☐ Global ⦿
  ⊞ Consumer (4) ○ ← Select region/cluster
  ⊞ MD&D - Depuy Synthes (4) ○
  ⊞ MD&D - Ethicon CSS (4) ○
  ⊞ Pharm (4) ○ → Expand to see more

3. Click the blue "**pencil icon**" on the right to edit the data.

| Fill Rate Numerator | 35997 | # | | 18 days 0 hours | Edit ✎ |
| Fill Rate Denominator | 37343 | # | | 18 days 0 hours | ✎ |

4. Enter data/explanation/action, and click the blue "**check mark**" to save or red "**arrow**" to cancel.

| Fill Rate Denominator | 37343 | # | | | 18 days 0 hours | ✔ ← |

Data File Import

1. Click "**Data Imports**" in the menu bar.
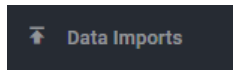
⬆ Data Imports

2. Select interval, current year, and current period.
3. Click "**Select File**" or drag in the file. Click "**Clear**" to clear the file that is just selected.

Data Imports

Current Calculation:	Next Calculation:	DATA IMPORT TYPE	
2016-Jun-06 10:05:38 AM	0001-Jan-01 12:00:00 AM	MEASURE DATA ▼	⊕ UPLOAD

⊞ SELECT INTERVAL

Intervals
Quarterly ▼

Year
2016 ▼

Quarter
Q1: Jan 4, 2016 to Apr 3, 2016 ▼

Select interval

⬛ SELECT FILE   ⟳ CLEAR

File name:

or Drag and Drop an XLSX / XLS file here

Clear data on this page

Select or drag and drop the file

*Note:

    a. The system will **only** recognize the upload file and upload data if it has the following column names (upload template and IDs can be found on SharePoint). "Measure ID", "Hierarchy ID", and "Value" columns are must-have columns. The system is not order sensitive.

	A	B	C	D	E
1	Measure ID	Hierarchy ID	Value	Explanation	Action
2					
3					
4					

    b. Value, Explanation, and Action can be blank. Measure Id and Hierarchy Id can neither be blank nor "0".

    c. Please do NOT have any blank rows in the document.

    d. Minimize numbers of tabs of the upload file to ensure successful upload.

4. Select correct sheet if the file contains multiple worksheet. Note: the system is only able to upload one worksheet at once. Click "**Continue**" to continue upload.

✔ CONTINUE   ✖ CANCEL

Multiple Spreadsheet Confirmation

There are multiple spreadsheets.
Pick the right one to continue.

○ 2016Q1
◉ 2016Q1 Actual Upload
○ 2016Target
○ 2016Target Upload

Select sheet and continue

5. Click "**Upload**" at the top right corner to upload the data.

Upload data

Clear data
on this page
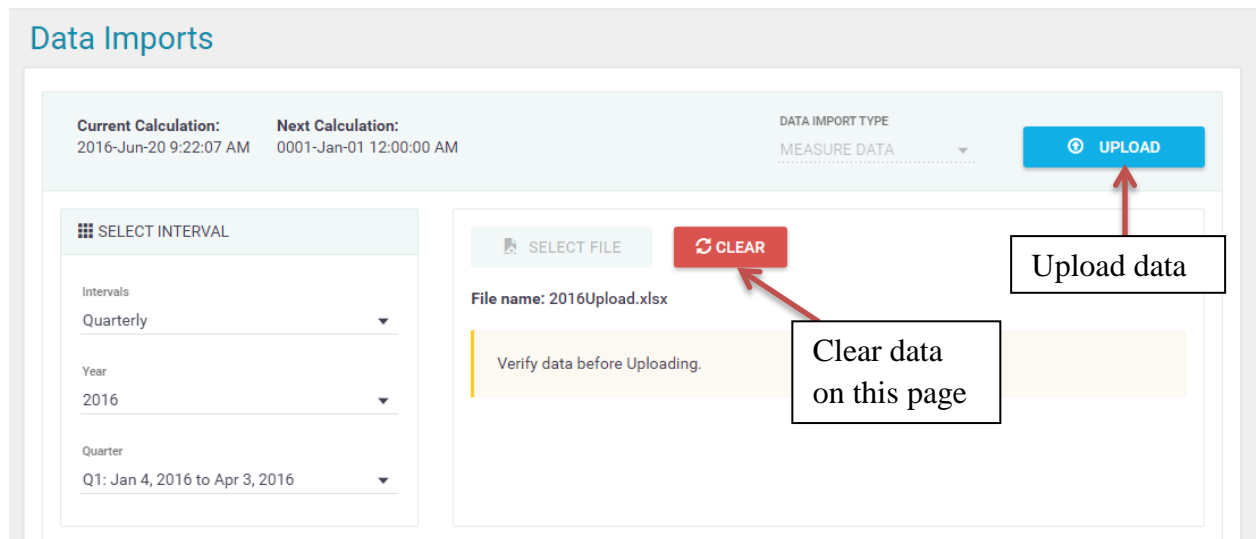
6. There will be a pop-up window to double check the interval and time period of the
    upload. Click "**Yes**" if the information showing is correct and to finish upload,
    otherwise, click "**No**" to modify upload interval, year, period, or data file.

Click "**Yes**" to finish upload
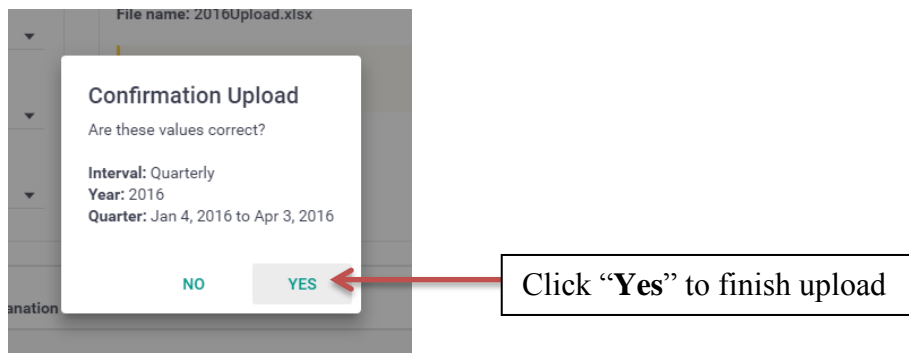
7. None data will be upload if any error message pops up.

View Data and Dashboard

1. Click on "**Measure Data**" in the menu bar.
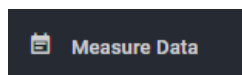
2. Click "**Filter**" to select the year, quarter, metric, and region.
3. View current data or hover over a measurement to see the targets and expression if it is
    calculted.

Hover over measure name to see more details.

4. Cells of measurements that have targets and tolerances will show green, yellow, or red to indicate their status.


5. Click "**Tableau Dashboards**" to view dashboards. Use J&J credentials to sign in.
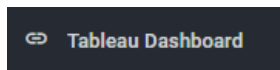

6. To download the Tableau workbook, hover over the workbook you want to download and click on "**…**" icon at the top right corner. Then click on "**Download**"

7. The workbook should now be downloaded to the "Download" folder on your PC. Users can open the workbook with Tableau Desktop or Tableau Reader. Please note that a **9.1.1 or higher version** of Tableau Desktop or Tableau Reader is required in order to

open this workbook. To download higher version of Tableau, visit Iris or
https://www.tableau.com/support/esdalt.
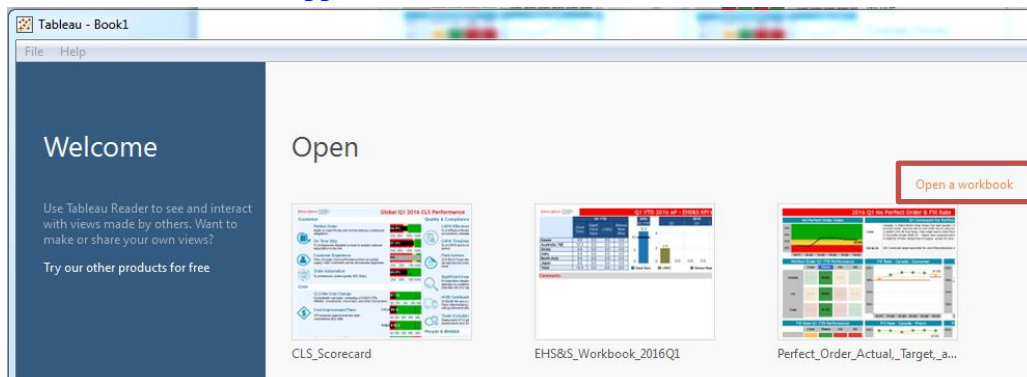
8. To export a Tableau worksheet, click "**Worksheet**" in the menu bar. Then click "**Copy**"
or "**Export**". Now, users can choose to export/copy data as image or as crosstab (Excel).

    or
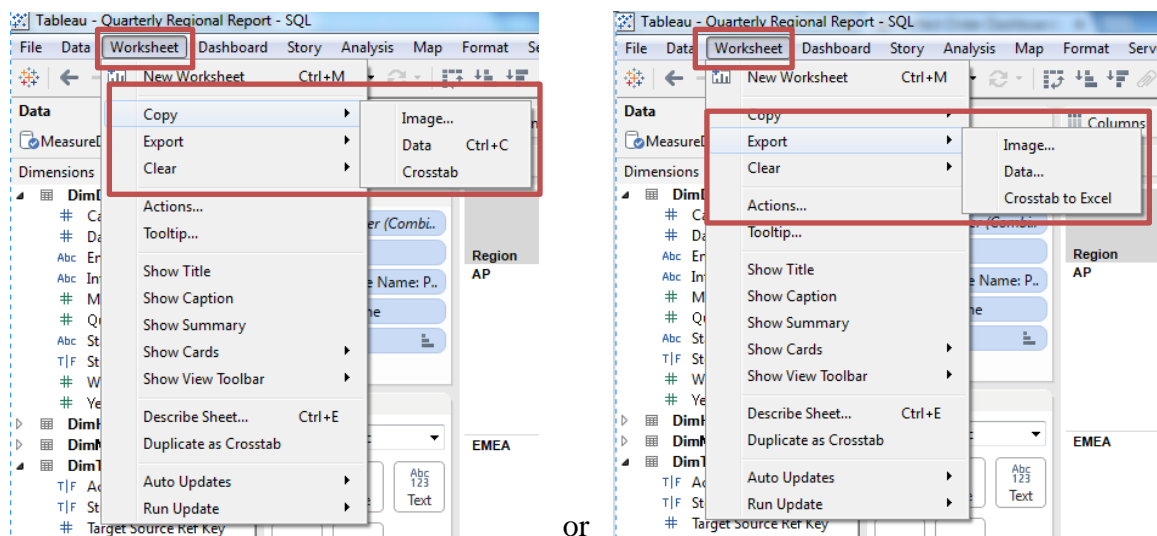
9. To export a Tableau dashboard, click "**Dashboard**" in the menu bar. Then click "**Copy
Image**" or "**Export Image**".
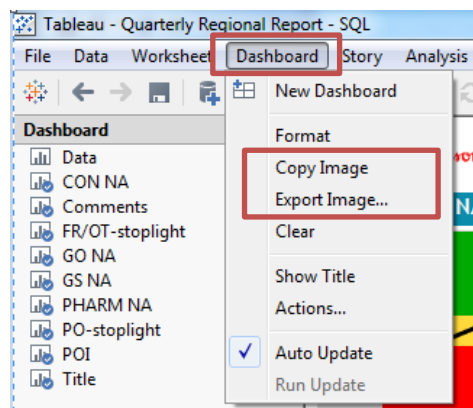
Note

1. The system will log out after 15 minutes if the webpage is not active.
2. For measurements that have a unit of percentage, please enter in decimal format. Ex: 0.964468.
3. New data will overwrite old data. However, "blank" cannot overwrite the old data. To delete data, please go to "Measure Data" and delete manually.
4. " ⊘ " means the measurement is calculated by the system. One can only edit its "Explanation" and "Action".
5. " ⌀ " means the user does not have the access to edit the measurement.

Regional Administrator
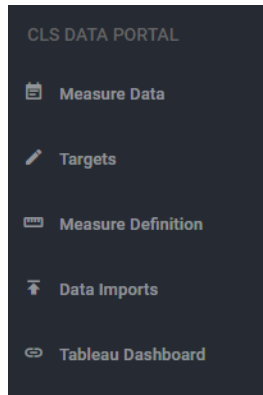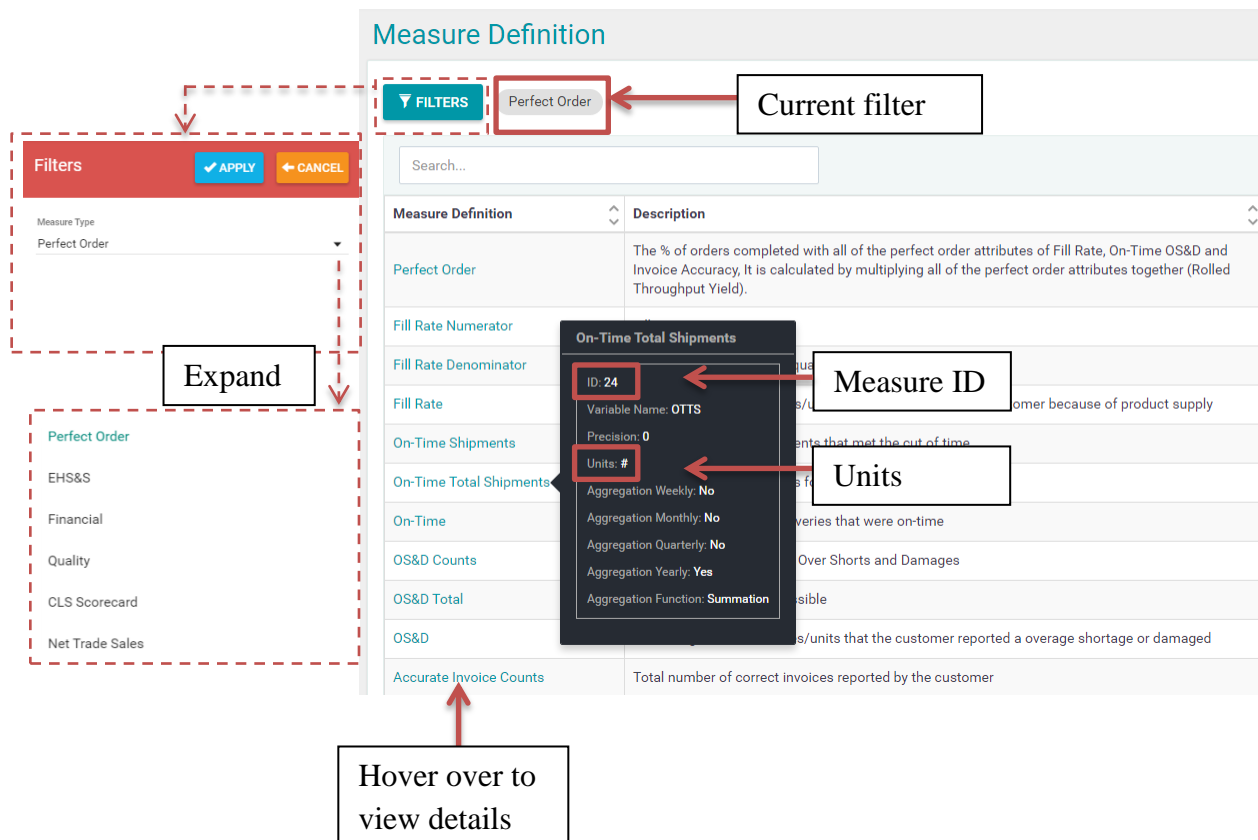
Besides functions mentioned above, regional administrator will also see "Targets" and "Measure Definition" tabs in the main menu.

Under "Measure Definition", regional administrator will be able to view more information of the measures, such as measure IDs, measure descriptions, units, and more. Please note that any change that is made under this tab will apply to **all** regions.

Under "**Targets**", regional administrator will be able to view and edit targets and tolerances.

Measure Definition

Current filter

Expand

Measure ID

Units

Hover over to view details

Targets

Regional administrators will be able to view the targets