



CLS Data Portal User Reference Guide

A guide to regional quarterly reporting data entry webpage

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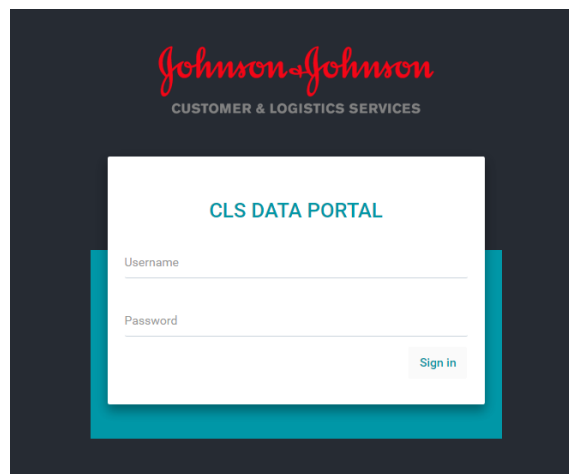
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Overview

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

The screenshot shows the Johnson & Johnson CLS Data Portal interface. The top navigation bar includes the logo, a menu icon, and links for "Help" and "Logout". The left sidebar contains a "Menu bar" with options: "Measure Data", "Data Imports", and "Tableau Dashboard". The main content area is titled "Measure Data" and features a "FILTERS" section with buttons for "Quarterly", "Perfect Order", and "Global". Below the filters is a search bar and a date range selector "[JAN-04-2016, APR-03-2016]". A table displays data with columns: "Measure Definition", "Value", "Units", "Explanation", "Action", and "Updated". The table includes rows for "Perfect Order" and "Fill Rate". A "REFRESH" button is located in the top right of the table area. Annotations include: "Click to hide the menu on the left." pointing to the menu icon; "“Help” and “Logout”" pointing to the top right links; "Menu bar" pointing to the sidebar; "Click to edit the filter" pointing to the FILTERS button; "Current filter" pointing to the filter buttons; "Type to search" pointing to the search bar; "To sort" pointing to the column headers; "Refresh and select data type." pointing to the REFRESH button; and "Hover over to view username & last update time." pointing to the "Updated" column.

Click to hide the menu on the left.

“Help” and “Logout”

Menu bar

Click to edit the filter

Current filter

Type to search

To sort

Refresh and select data type.

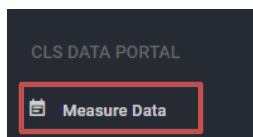
Hover over to view username & last update time.

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]

Intervals
Quarterly

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

Measure Type
Perfect Order

Hierarchy: Global

- Global (selected)
- Consumer (4)
- MD&D - Depuy Synthes (4)
- MD&D - Ethicon CSS (4)
- Region (4)

Callouts:

- Apply filter (points to APPLY button)
- Select interval (points to Quarterly)
- Select year and period (points to 2016 and Q1)
- Select measure type (points to Perfect Order)
- Select region/cluster (points to Consumer)
- Expand to see more (points to Region)

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

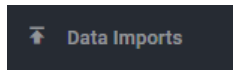
Fill Rate Numerator	35997	#			10 days 0 hours	
Fill Rate Denominator	37343	#			18 days 0 hours	

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

Fill Rate Denominator	<input type="text" value="37343"/>	#	<input type="text"/>	<input type="text"/>	18 days 0 hours	
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Data File Import

1. Click “**Data Imports**” in the menu bar.



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

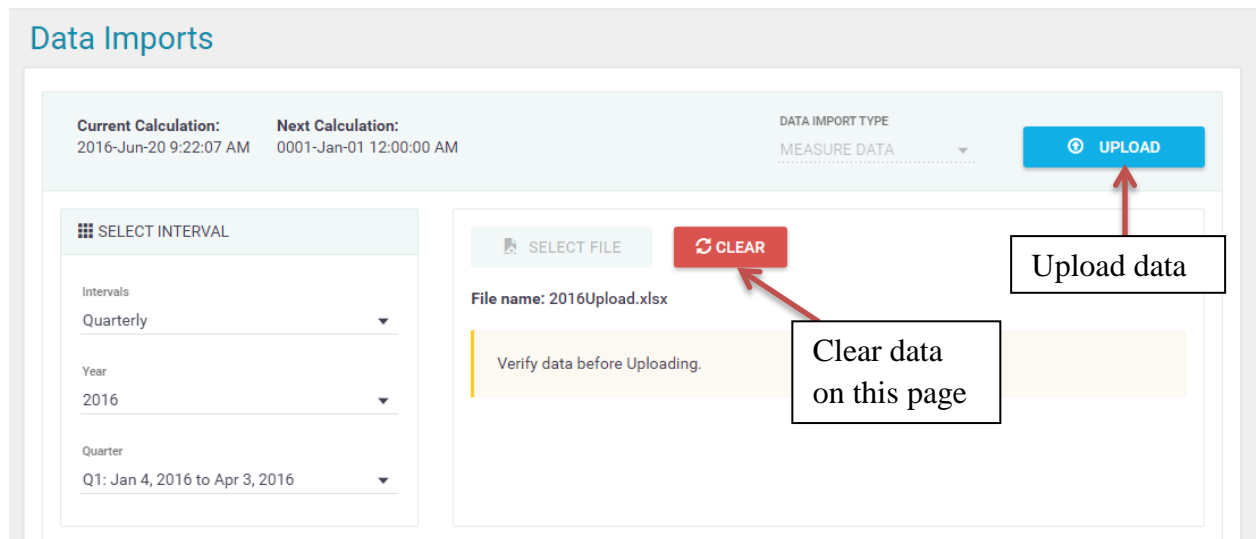
The screenshot shows the 'Data Imports' interface. At the top, it displays 'Current Calculation: 2016-Jun-06 10:05:38 AM' and 'Next Calculation: 0001-Jan-01 12:00:00 AM'. On the right, there is a 'DATA IMPORT TYPE' dropdown set to 'MEASURE DATA' and an 'UPLOAD' button. On the left, a 'SELECT INTERVAL' panel is highlighted with a red box. It contains three dropdown menus: 'Intervals' (set to 'Quarterly'), 'Year' (set to '2016'), and 'Quarter' (set to 'Q1: Jan 4, 2016 to Apr 3, 2016'). A red arrow points from a box labeled 'Select interval' to this panel. In the center, there is a 'SELECT FILE' button and a 'CLEAR' button. A red arrow points from a box labeled 'Clear data on this page' to the 'CLEAR' button. Below these buttons is a dashed box with the text 'or Drag and Drop an XLSX / XLS file here'. A red arrow points from a box labeled 'Select or drag and drop the file' to this area. A 'File name:' label is positioned above the dashed box.

*Note:

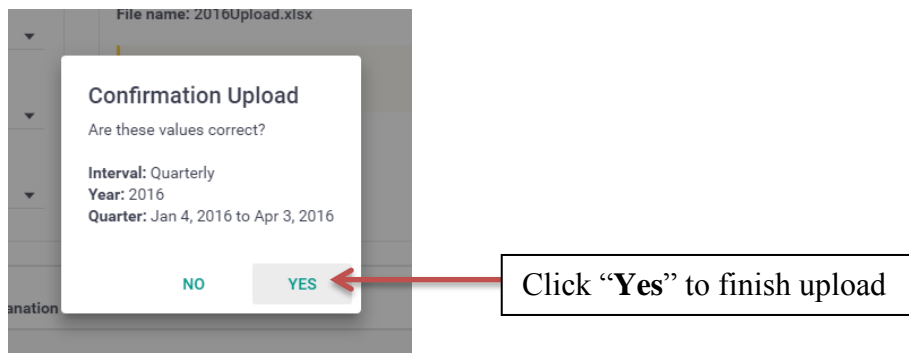
- a. The system will **only** recognize the upload file and upload data if it has the following column names ([upload template and IDs](#) can be found on SharePoint). “Measure ID”, “Hierarchy ID”, and “Value” columns are must-have columns. The system is not order sensitive.
- | | A | B | C | D | E |
|---|------------|--------------|-------|-------------|--------|
| 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.

The screenshot shows a 'Multiple Spreadsheet Confirmation' dialog box. It has a red header bar with 'CONTINUE' and 'CANCEL' buttons. The text inside says 'There are multiple spreadsheets. Pick the right one to continue.' Below this are four radio button options: '2016Q1', '2016Q1 Actual Upload' (which is selected), '2016Target', and '2016Target Upload'. A red arrow points from a box labeled 'Select sheet and continue' to the '2016Q1 Actual Upload' option.

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



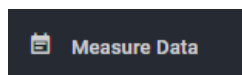
6. There will be a pop-up window to double check the interval and time period of the upload. Click “**Yes**” if the information showing is correct and to finish upload, otherwise, click “**No**” to modify upload interval, year, period, or data file.



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.



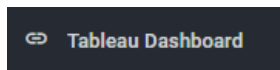
2. Click “**Filter**” to select the year, quarter, metric, and region.
3. View current data or hover over a measurement to see the targets and expression if it is calculted.

Hover over measure name to see more details.

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

Fill Rate	0.946
On-Time	0.94468

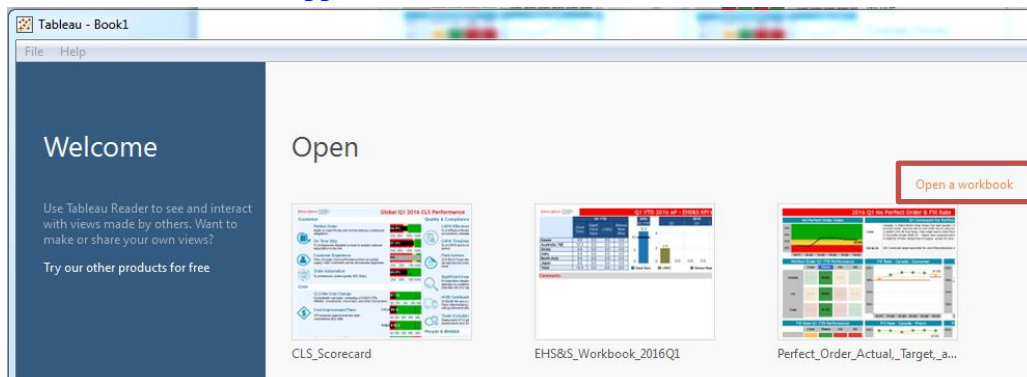
- Click “**Tableau Dashboards**” to view dashboards. Use J&J credentials to sign in.



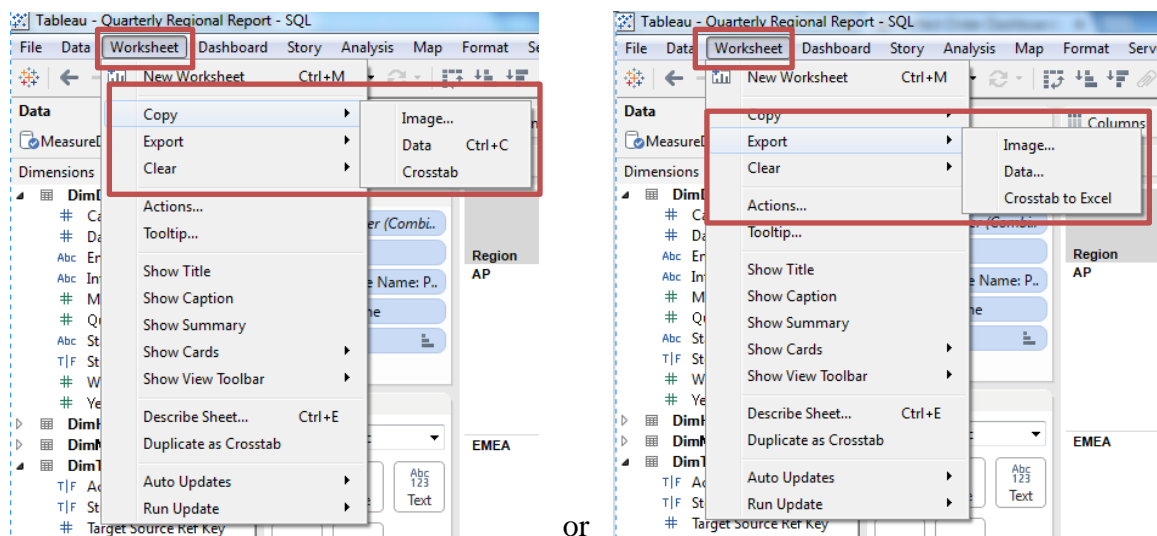
- To download the Tableau workbook, hover over the workbook you want to download and click on “...” icon at the top right corner. Then click on “**Download**”

- 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

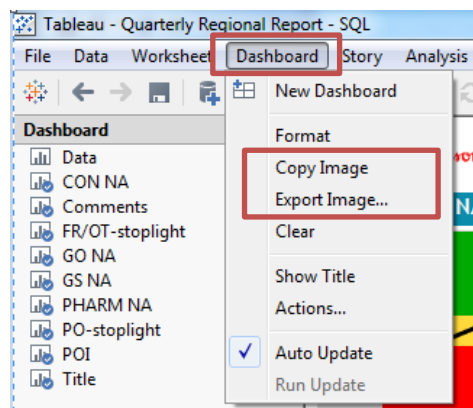
open this workbook. To download higher version of Tableau, visit Iris or <https://www.tableau.com/support/esdalt>.





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).



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

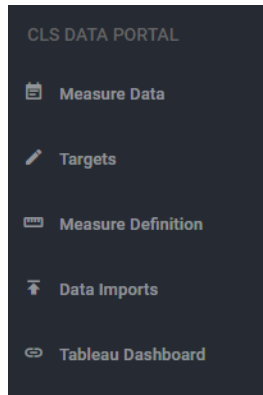


Note

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

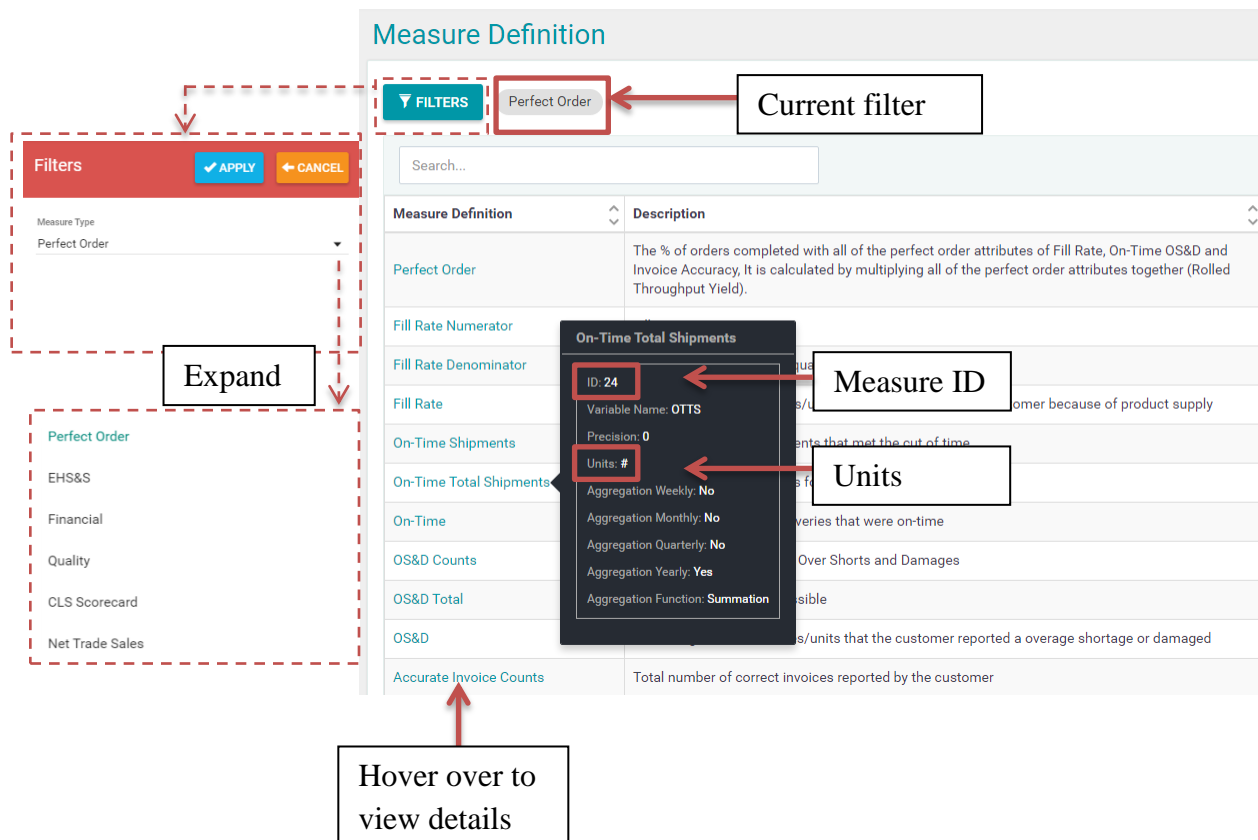


Besides functions mentioned above, regional administrator will also see “Targets” and “Measure Definition” tabs in the main menu.

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

The image shows the 'Measure Definition' interface with several annotations. A red dashed box on the left, labeled 'Expand', highlights the 'Filters' sidebar. A red box at the top, labeled 'Current filter', points to the 'Perfect Order' filter button. A red box labeled 'Measure ID' points to 'ID: 24' in a tooltip for 'On-Time Total Shipments'. Another red box labeled 'Units' points to 'Units: #' in the same tooltip. A red arrow labeled 'Hover over to view details' points to the 'Accurate Invoice Counts' row in the table.

Measure Definition	Description
Perfect Order	The % of orders completed with all of the perfect order attributes of Fill Rate, On-Time OS&D and Invoice Accuracy. It is calculated by multiplying all of the perfect order attributes together (Rolled Throughput Yield).
Fill Rate Numerator	
Fill Rate Denominator	
Fill Rate	
On-Time Shipments	
On-Time Total Shipments	
On-Time	
OS&D Counts	
OS&D Total	
OS&D	
Accurate Invoice Counts	Total number of correct invoices reported by the customer

Targets

Regional administrators will be able to view the targets

Targets

FILTERS Perfect Order Global **Current Filter**

Search...

Click to edit filter

Measure Definition	Target Value	Target Yellow	Updated
Rate Numerator			1 months 9 days
Fill Rate Denominator			1 months 9 days
Fill Rate	0.97596928	0.9613698	3 days 22 hours
On-Time	0.97634227	0.966183	3 days 22 hours
On-Time Shipments			1 months 7 days
On-Time Total Shipments			1 months 7 days

Hover over to see who and when last edit it.

System
5/5/2016 6:35:38 PM
1 months 7 days