Productivity Analysis System User Guide

Team TBD

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Team Members

Luke McDuff

Abdelrahman Mourad

Brandon Nelson

Hoang Nguyen

Ethan Radford

Contents

1 Introduction

The Productivity Analysis System application allows users to effectively visualize data collected by Commerce Bank. The application will also allow users to select data measurements from different departments and view them as graphs that show the data over time. Different types of data juxtapositions are allowed by the application which allows for data comparisons across multiple departments. Users will also be able to search the entire data base to generate tables sorted by their specification.

2 Quick Start Guide

1. Open the website, URL is provided by Commerce, and login with your normal SSO.
2. You are now viewing the blank PAS application dashboard.
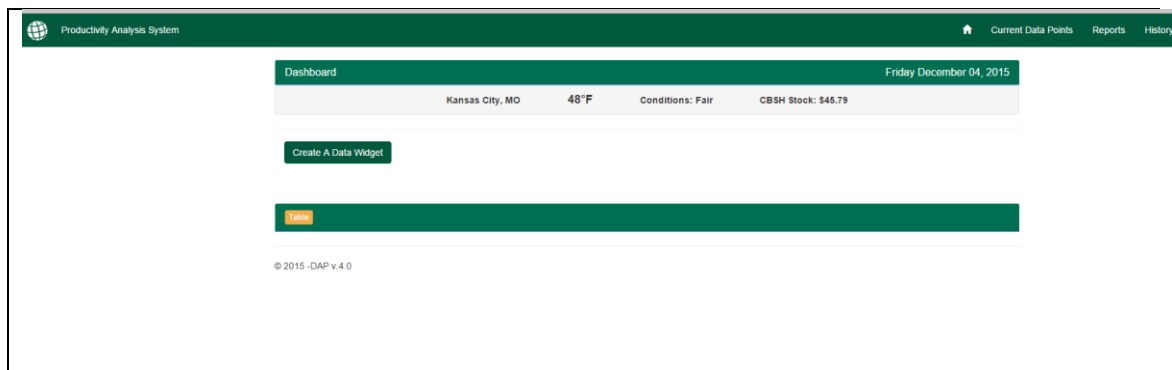
3. Click the 'Create a Data Widget' button. The create widget pop-up window loads.
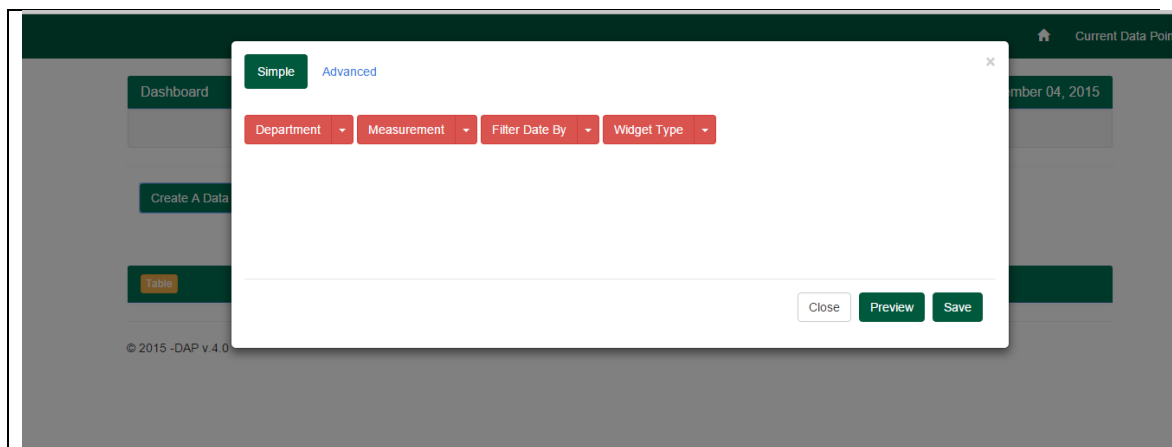
4. In the create widget pop-up window. Click the down arrow next to 'Department' and select the first department. Do the same for 'Measurement.' Select the 'Filter Date By' drop down and choose '12 Months'. For 'Widget Type' select 'Line Graph.' Then click the button 'Preview.' You will now see a graph containing the data points for the currently selected measurement and department filter by the dates.
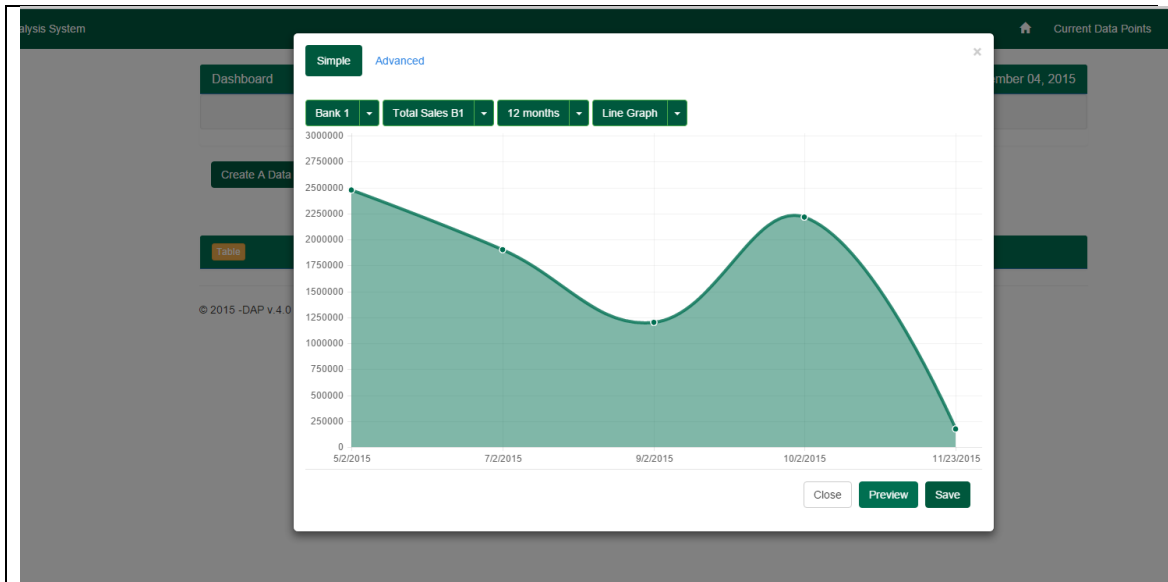
5. Now select the 'Widget Type' drop down again and choose 'Bar Graph.' Click the 'Preview' button then click the 'Save' button. Widget has now been generated and is saved to your dashboard.
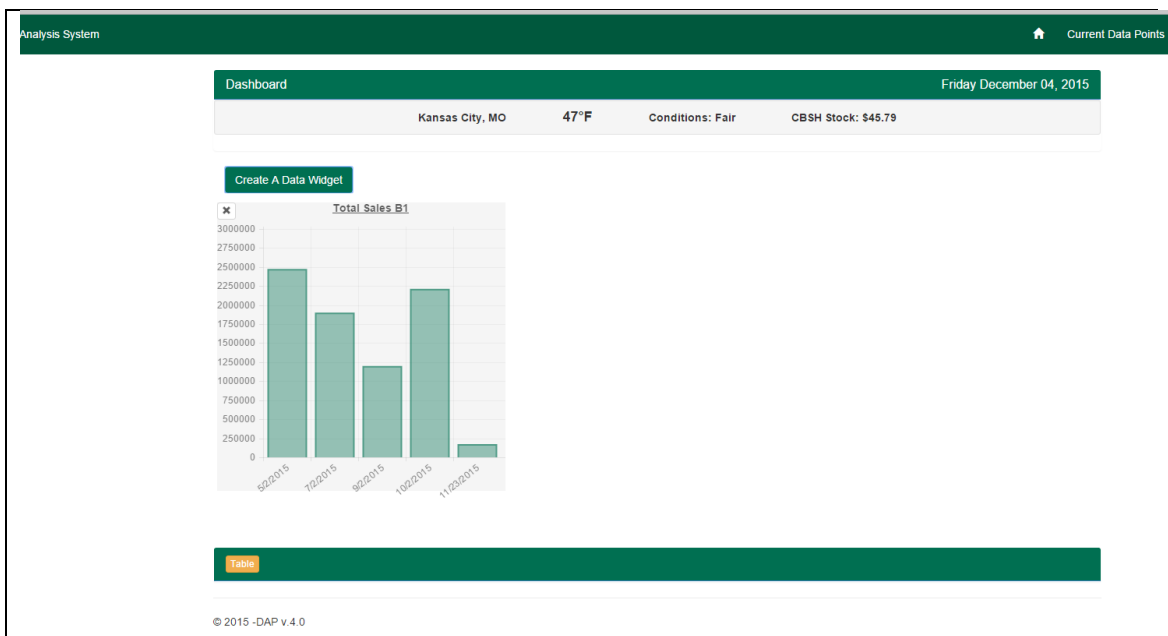
6. To view the Legend for each graph, hover the tooltip over the data point (in this case the actual bar) of choice and wait for 1 second. The legend will appear.
7. To delete the widget you just created, click on the 'X' in the top left corner of the widget.

3 System Requirements

The PAS system can be run from any modern browser with the company provided URL and SSO. Please consult the System Documentation for exact specifications for browser minimum requirements.
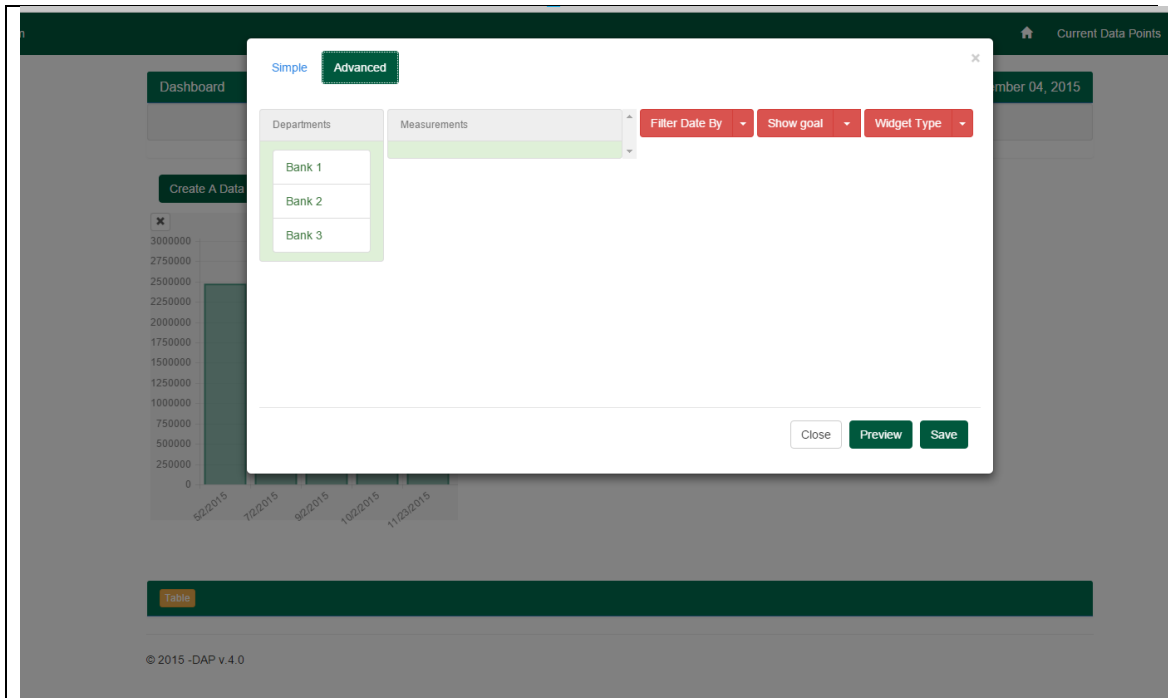
4 Main Scenarios of Use

## 4.1 Compare two departments by the same measurement

1. Open the PAS application and navigate to the dashboard screen. Click the 'Create A Data Widget' button. You will now be viewing the create widget pop-up window.
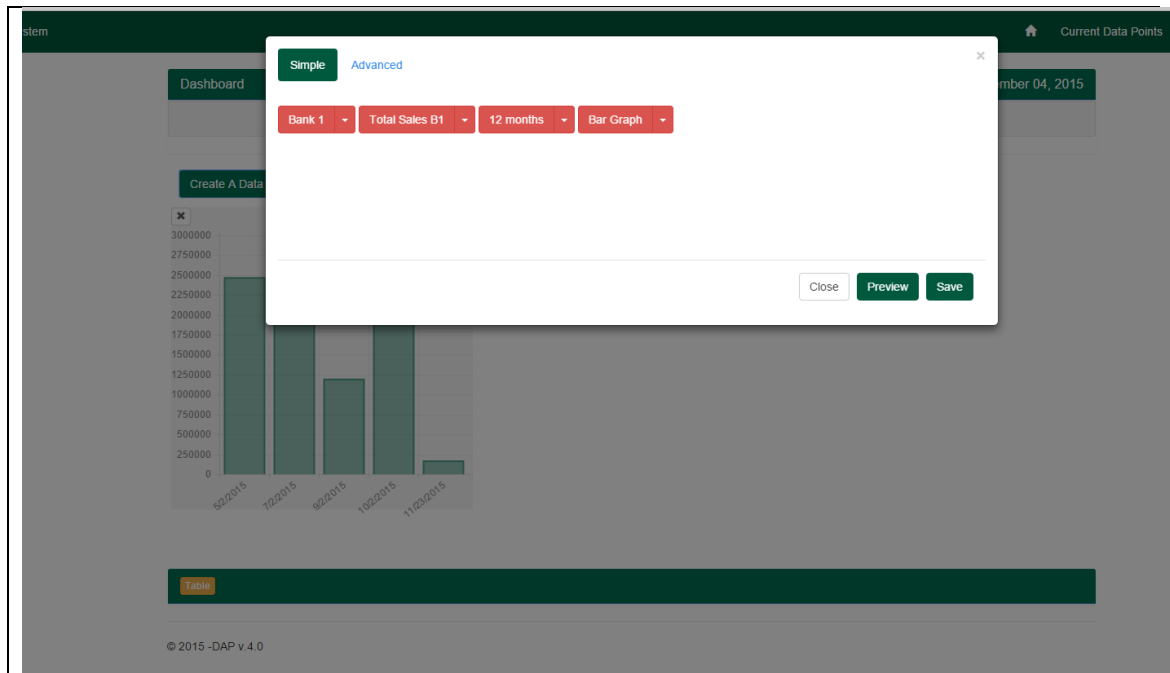
2. Click the 'Advanced' button. You will now be viewing the Advanced Tab section of the create widget pop-up window.

3. In the 'Departments' list select the values of two departments, in this case select 'Bank 1' and 'Bank 2.' The departments will highlight in green when they have been selected.
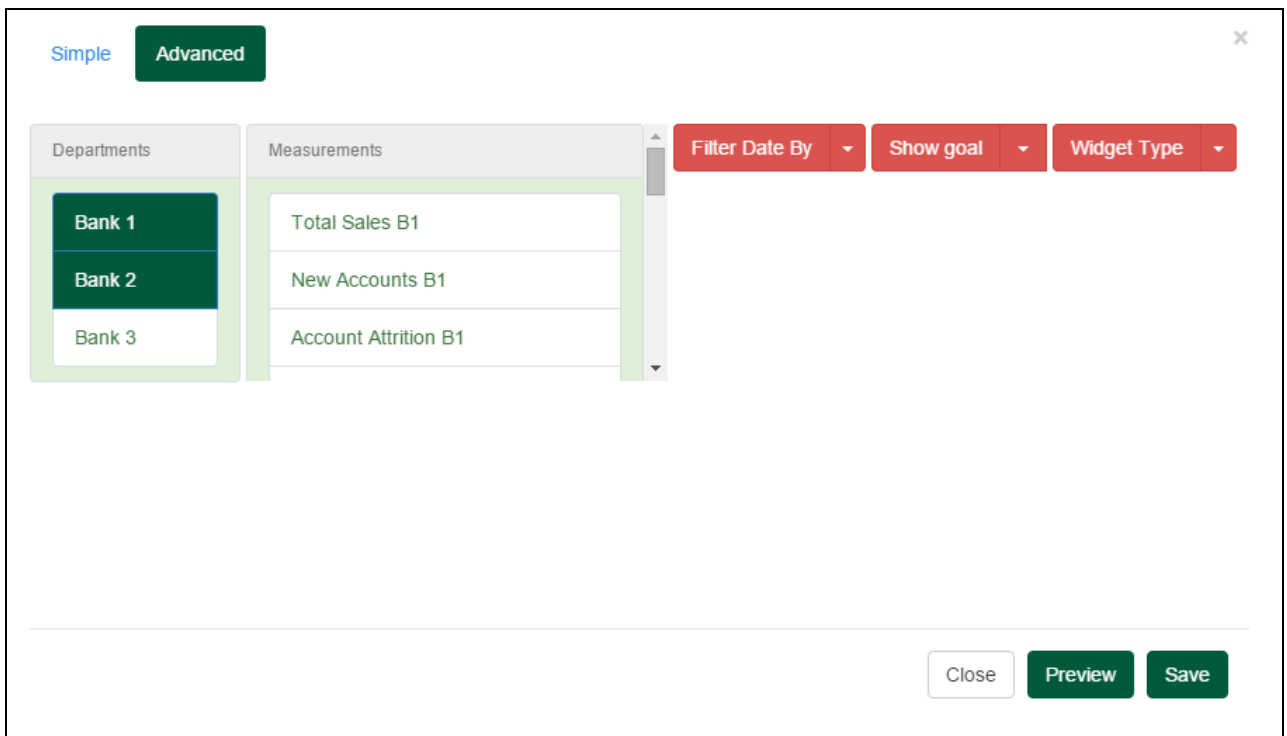
4. Each department that is selected you will see a list of measurements be added to the 'Measurements' list. Select the same measurements from each department. In this case select 'Total Sales B1' and Total Sales B2.' Note you may have to scroll the measurements list to find the measurement you are looking for. Then select '12 Months' For 'Filter Date By' drop down,

'No' for 'Show Goal' drop down, and 'Line Graph' for 'Widget Type.' Then click the button 'Preview.' You will now be seeing two measurements compared in the preview screen.
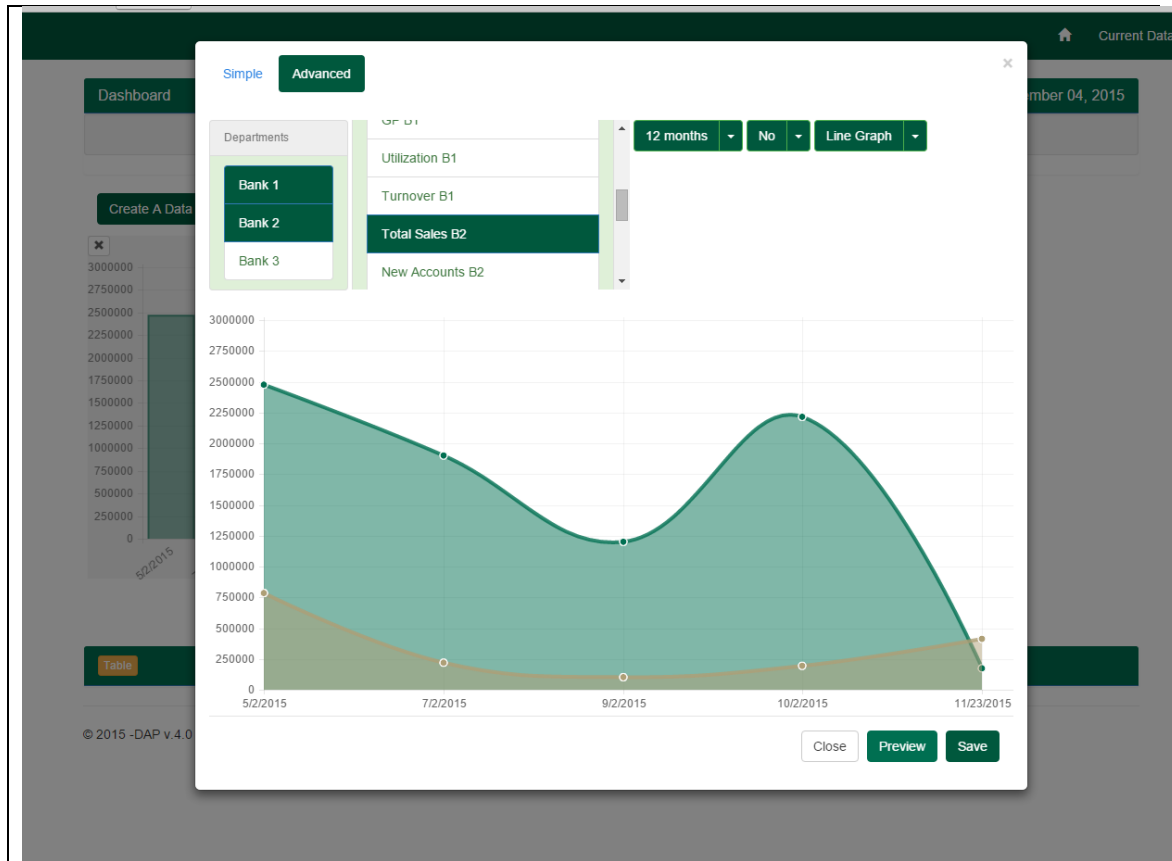
5. Click the 'Save' button. The widget will be saved to your dashboard.
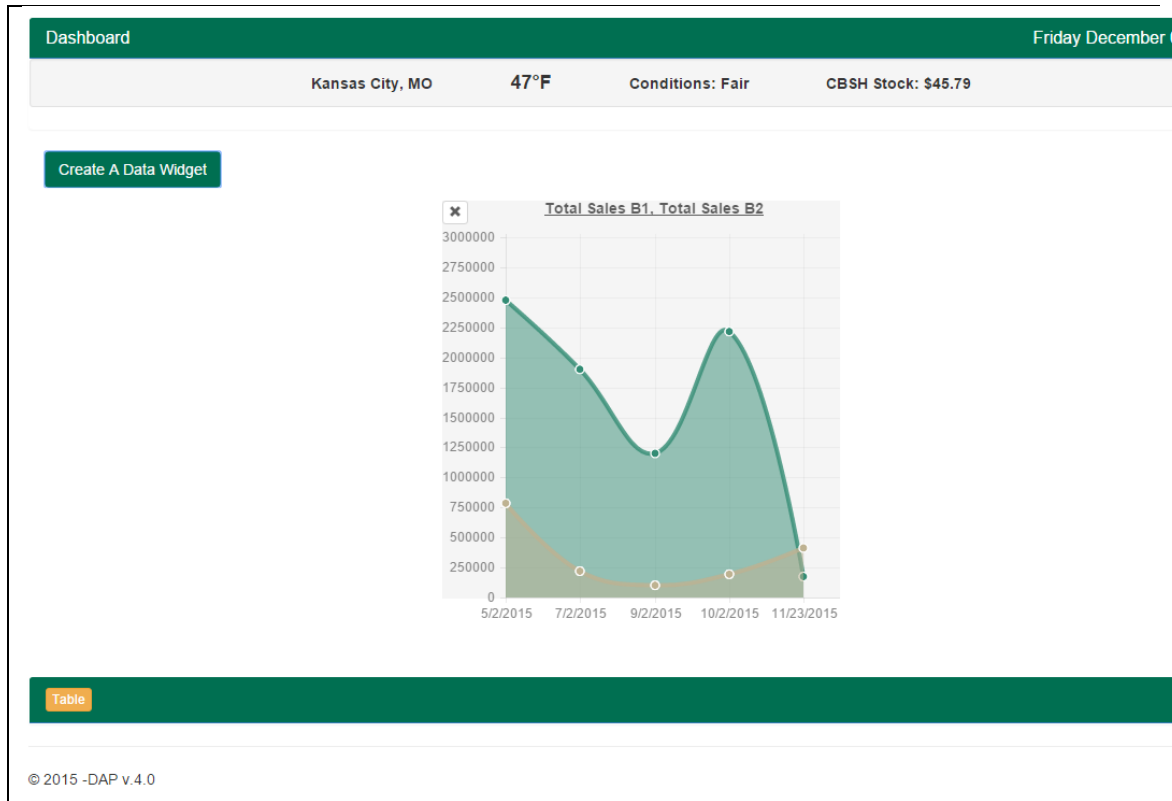
6. Hover the tooltip between two data points above a given date on the x-axis. You will see the legend appear for the line graph.

4.2 Compare a department's measurement to its 'Meets Value' goal

1. Complete step 1 and 2 of section 4.1.
2. Select one department from the 'Department' list. Select one measurement form the 'Measurement' list. Then select '12 Months' For 'Filter Date By' drop down. Click on the 'Goals' tab and 'Meets Value.' Then select 'Line Graph' for the 'Widget Type' drop down. Then click the 'Preview' button. You will the graph displayed with goal highlighted in red.
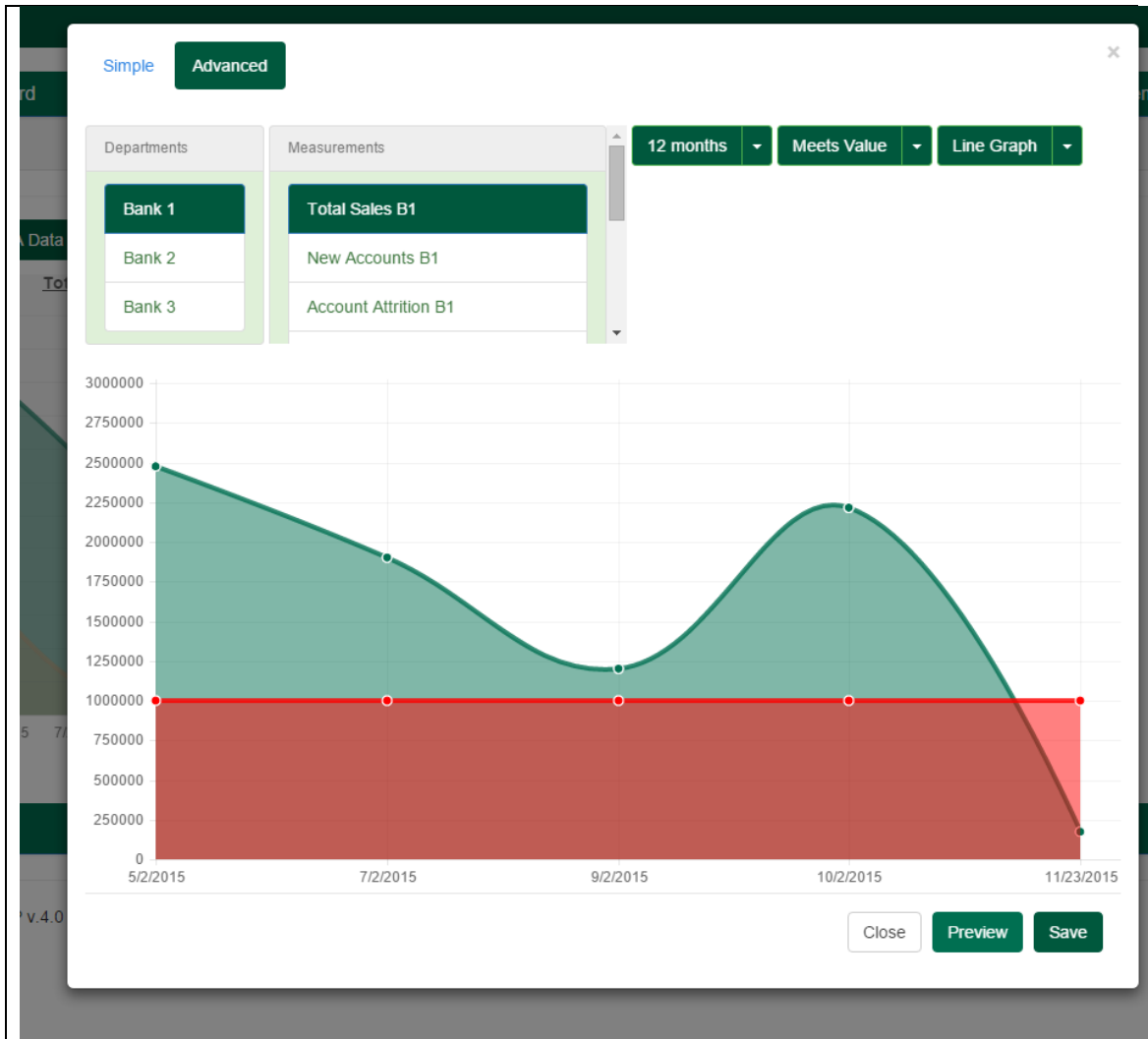
3. Click the 'Save' button. The widget will now be saved to the dashboard. Hovering the tooltip in between to data points above the same date will engage the legend pop-up.

4.3 Use the table to search and sort the database

1. Open the PAS application and navigate to the dashboard screen. Click on the button 'Table.' You will now see the table expand. Click on the first column header 'Department.' The table will be now be expanded.

Department	Measurement	Date	Value	Meets Value	Meets Value Plus	Exceeds
Bank 1	Total Sales B1	9/2/2015	1200583.12	120.06%	70.72%	6.00%
Bank 1	Total Sales B1	7/2/2015	1900789.76	190.08%	111.97%	9.50%
Bank 1	Total Sales B1	5/2/2015	2475925.12	247.59%	145.85%	12.38%
Bank 1	Total Sales B1	11/23/2015	174390.87	17.44%	10.27%	0.87%
Bank 1	Total Sales B1	5/2/2014	2217460.37	221.75%	130.63%	11.09%
Bank 1	Total Sales B1	10/2/2015	2215000.17	221.50%	130.48%	11.08%
Bank 1	New Accounts B1	9/2/2015	457	120.26%	114.25%	108.42%
Bank 1	New Accounts B1	10/2/2015	551	145.00%	137.75%	130.72%
Bank 1	New Accounts B1	7/2/2015	231	60.79%	57.75%	54.80%
Bank 1	New Accounts B1	5/2/2015	608	160.00%	152.00%	144.25%
Department	Measurement	Date	Value	Meets Value	Meets Value Plus	Exceeds

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2. In the white search box below the 'Department' column type the value 'Bank 3' the table will now only display rows containing the department of 'Bank 3.' In the search box beneath column 'Measurement' type the value 'New Accounts B3.' The table will now only display rows with 'New Accounts B3.'

Department	Measurement	Date	Value	Meets Value	Meets Value Plus	Exceeds V
Bank 3	New Accounts B3					
Bank 3	New Accounts B3	9/2/2015	412	91.56%	86.74%	84.25%
Bank 3	New Accounts B3	10/2/2015	344	76.44%	72.42%	70.35%
Bank 3	New Accounts B3	7/2/2015	510	113.33%	107.37%	104.29%
Bank 3	New Accounts B3	5/2/2015	557	123.78%	117.26%	113.91%
Bank 3	New Accounts B3	11/23/2015	599	133.11%	126.11%	122.49%
Bank 3	New Accounts B3	5/2/2014	512	113.78%	107.79%	104.70%
Department	Measurement	Date	Value	Meets Value	Meets Value Plus	Exceeds V

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3. To sort the table by the column 'Date' click on the column header 'Date.' Clicking the head twice will reverse the sort. You will now see the table sorted by date in either or descending order.

Table							
⇕ Department	⇕ Measurement	⇕ Date	⇕ Value	⇕ Meets Value	⇕ Meets Value Plus	⇕ Exceeds Val
Bank 3	New Accounts B3					
Bank 3	New Accounts B3	5/2/2014	512	113.78%	107.79%	104.70%
Bank 3	New Accounts B3	5/2/2015	557	123.78%	117.26%	113.91%
Bank 3	New Accounts B3	7/2/2015	510	113.33%	107.37%	104.29%
Bank 3	New Accounts B3	9/2/2015	412	91.56%	86.74%	84.25%
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Bank 3	New Accounts B3	11/23/2015	599	133.11%	126.11%	122.49%
⇕ Department	⇕ Measurement	▲ Date	⇕ Value	⇕ Meets Value	⇕ Meets Value Plus	⇕ Exceeds Val

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5 Troubleshooting

In the event that an error occurs with any aspect of the PAS system please contact the system administrator or help desk available to you at Commerce.