MultiFlex Business Intelligence Tool Documentation

Frequency of Data Updates to the B.I. Engine

Between the hours of 8 a.m. and midnight UTC, data is extracted from RMS every half hour and sent to the Business Intelligence Engine. There is no data extraction between 12 midnight and 8 a.m. UTC.

For smaller organizations, the data in reports will be as current as the last 30 minutes. For larger organizations, data updates may take longer depending on the number of transactions that your organization has processed. If you are running a report in the morning, the data can be assumed to be current as of midnight the previous business day. If you are running a report at the end of the business day, the data should reflect the beginning of the business day.

Note that some of the data reflected in the reports will reflect end summaries for the time periods selected.

Report Time Zones

The MultiFlex Business Intelligence Tool operates in the UTC time zone. Any reports you generate will reflect UTC format.

Report Generation and Speed

The report is generated in the cloud, so your local internet connection speed will not affect it. The amount of time that a report takes to generate will depend on the time period and number of transactions that the B.I. Engine must analyze to generate the report.

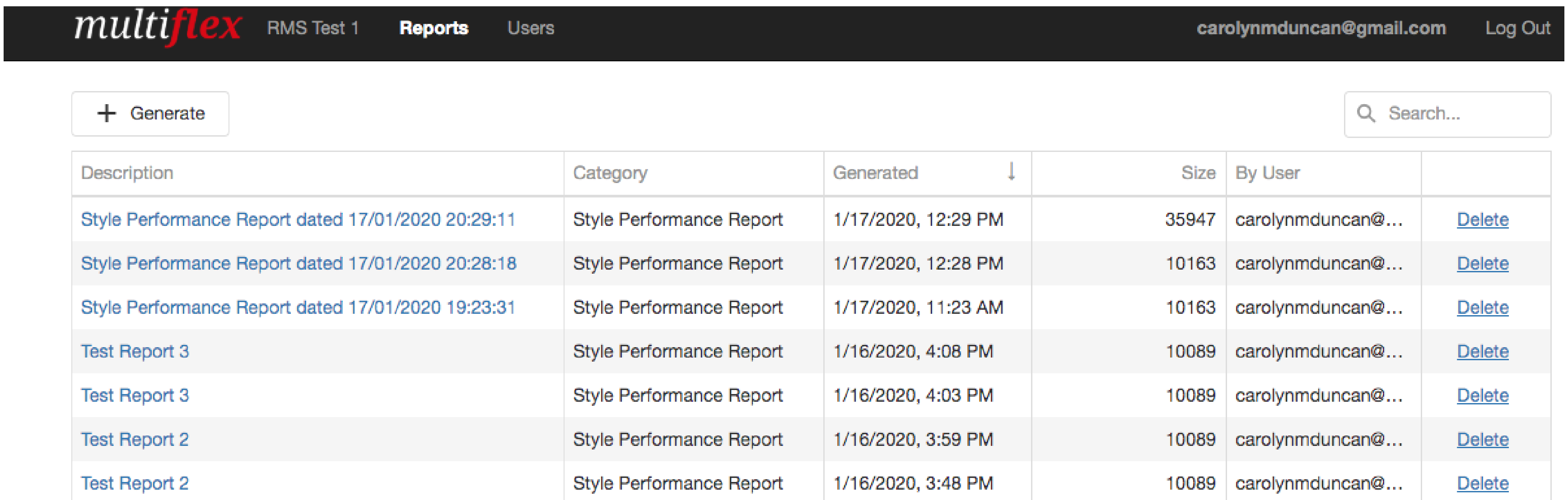
While the report is generating, you can close out of the Report screens and return back to it as needed. You can also generate multiple reports simulteaneously.

Report Aging

Reports are held in the system for up to 90 days, unless you chose to delete them earlier. If you need to save a copy of the report for longer than 90 days, please export the report to your computer.

Generating a New Report

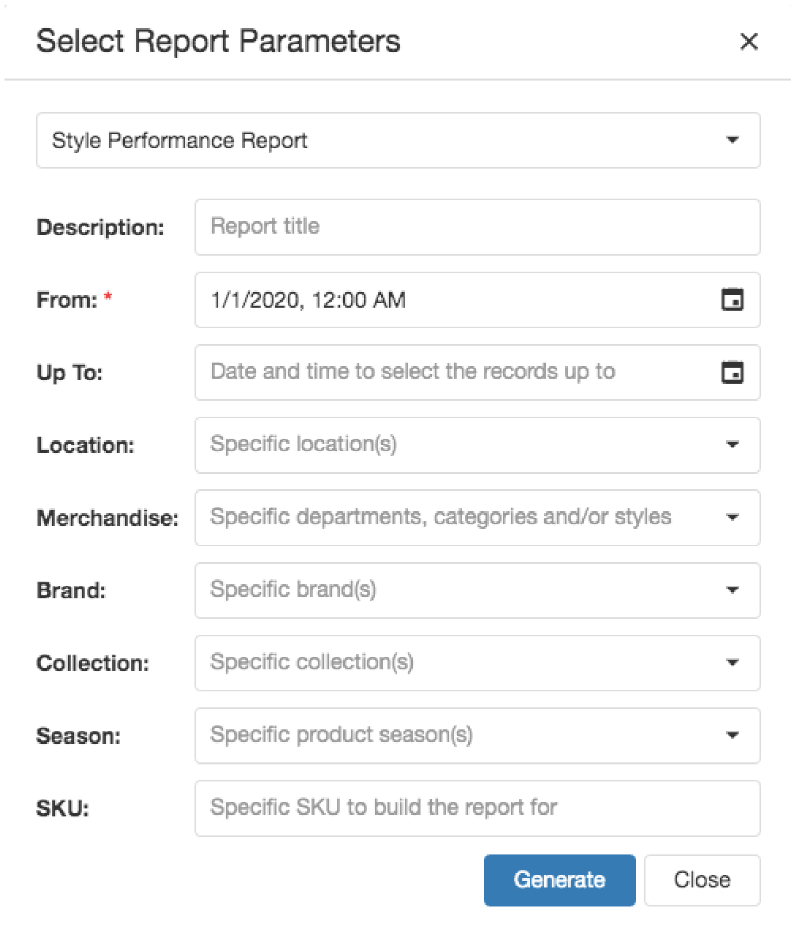
1. To generate a new report, log into the [MultiFlex Business Intelligence Tool](). You should see the Report screen with a list of past reports that have been generated, if applicable.



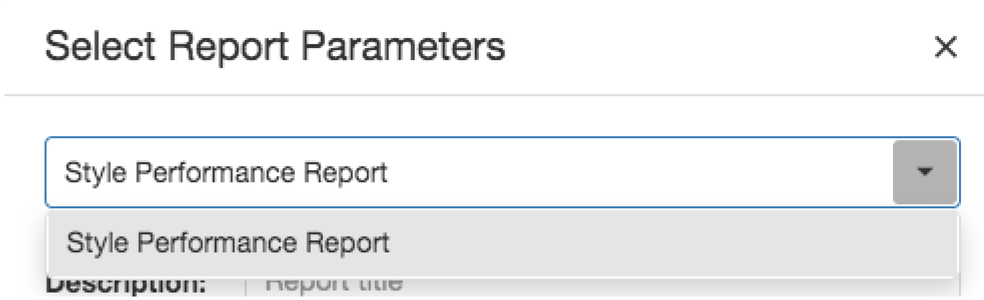
Description	Category	Generated	Size	By User	
Style Performance Report dated 17/01/2020 20:29:11	Style Performance Report	1/17/2020, 12:29 PM	35947	carolynmduncan@...	Delete
Style Performance Report dated 17/01/2020 20:28:18	Style Performance Report	1/17/2020, 12:28 PM	10163	carolynmduncan@...	Delete
Style Performance Report dated 17/01/2020 19:23:31	Style Performance Report	1/17/2020, 11:23 AM	10163	carolynmduncan@...	Delete
Test Report 3	Style Performance Report	1/16/2020, 4:08 PM	10089	carolynmduncan@...	Delete
Test Report 3	Style Performance Report	1/16/2020, 4:03 PM	10089	carolynmduncan@...	Delete
Test Report 2	Style Performance Report	1/16/2020, 3:59 PM	10089	carolynmduncan@...	Delete
Test Report 2	Style Performance Report	1/16/2020, 3:48 PM	10089	carolynmduncan@...	Delete

2. Click the “Generate” button found in the upper left-hand corner of the screen, as seen above.

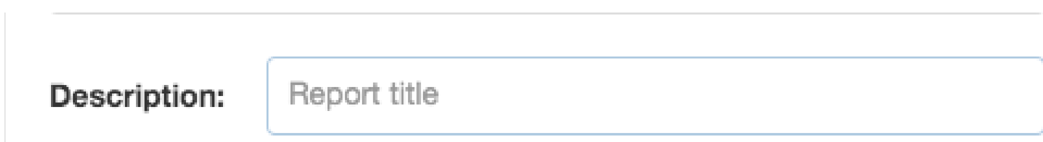
3. You will see a screen pop-up called “Select Report Parameters.” While you are logged in, the system will remember the parameters that you used for the prior report. If you log out and then log back in, the parameters will be reset.



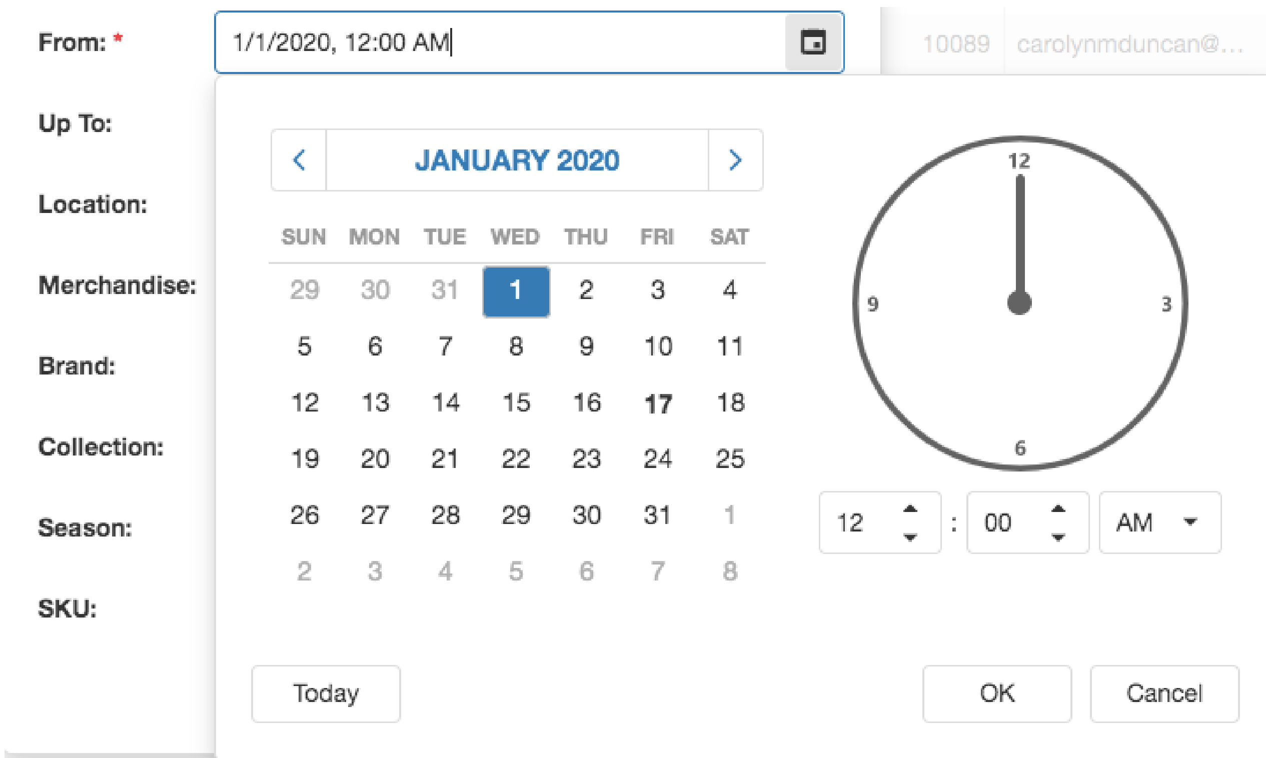
4. You should see a drop down menu that gives you a list of reports that you can generate for your organization. In this example, the Style Performance Report can also be used to analyze information you would find in other reports as well.



5. ***Description field (optional):*** Enter a name that will help you differentiate this report from others you may generate. If you leave the Description field blank, it will autofill with the name of the report and the date and time stamp.



6. ***From field (required):*** The "From" field is required when generating a report. You can click on the calendar icon to use the date selector, as pictured below. The time you enter will be converted into UTC format in the generated report.

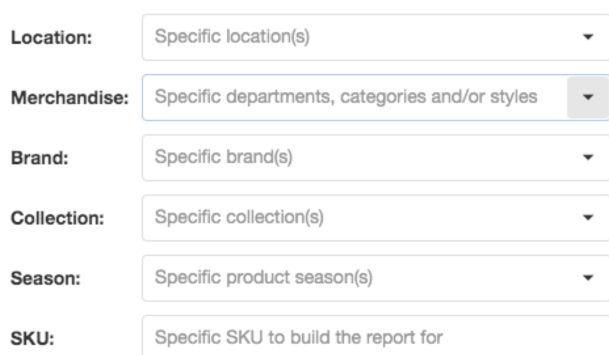


For merchants with online sales channels, you may find it useful to run reports that cover as little as an hour to analyze the effectives of online sales and promotions.

7. ***Up To:*** This field is not required. If you leave “Up To” blank, the report will include up to the last data update, also known as a “snapshot,” that was sent to the BI Engine.

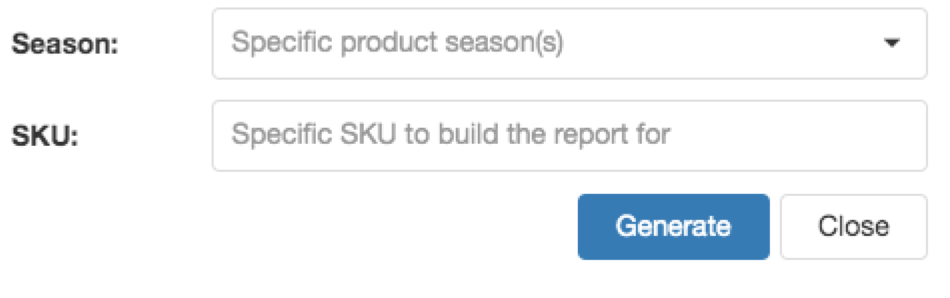
For smaller organizations, the data will be as current as the last 30 minutes. For larger organizations, data updates may take longer depending on the number of transactions that your organization has processed. If you are running a report in the morning, the data can be assumed to be current as of midnight the previous business day. If you are running a report at the end of the business day, the data should reflect the beginning of the business day.

8. ***Location, Merchandise, Brand, Collection, Season, and SKU Parameters***: We recommend that you skip applying these parameters unless you are certain you want to limit the report to specific selections. You will have multiple options for filtering and grouping your results once the report is generated.



If you are sharing the report with another individual, you may want to apply these parameters to limit the data that is reflected in the report. For example, you may only want to share data for one store location with the store's manager.

9. Once you are done selecting your parameters, click the blue button that says "Generate."



10. The system should return to the Report screen, where you will see a blue progress bar while the report is being generated. The report may take several minutes to generate depending on the size. The progress bar will update to the file size once the report is ready to view.

11. Once you see your report update to the file size, you can click on the name of the report to view it.

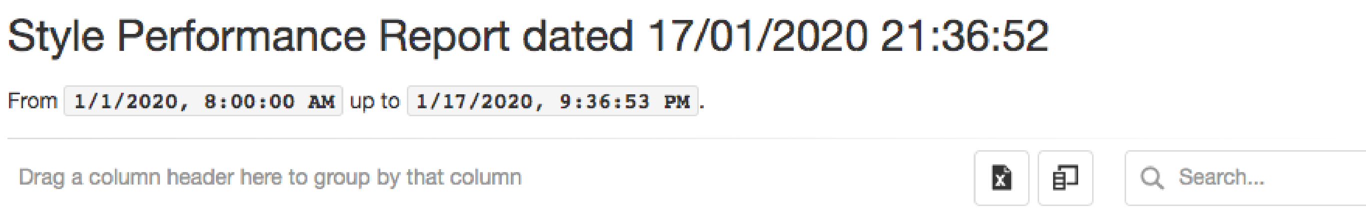
Viewing and Organizing the Generated Report

Mobile and Browser Compatibility

Reports can be viewed on any desktop, laptop, or mobile device. The preferred browser for viewing reports is Chrome, followed by Safari. You can view the reports on Internet Explorer, but this is not a recommended browser.

Search

You can perform quick searches for any term by typing it into the search bar at the top right-hand corner of your screen. This will filter the report to any items that match your search terms.



Totals

You will see a Totals row at the bottom of each page of your report. Totals are for the entire report, rather than the page displayed. If you apply a filter, the new total will reflect the filtered data.

Lines Per Page

For large reports, you will find an option at the bottom left-hand corner to display 100 items, 500 items, or 1000 items per page.

Sort Order

Click on a column header to change whether the column is sorted by ascending or descending order.

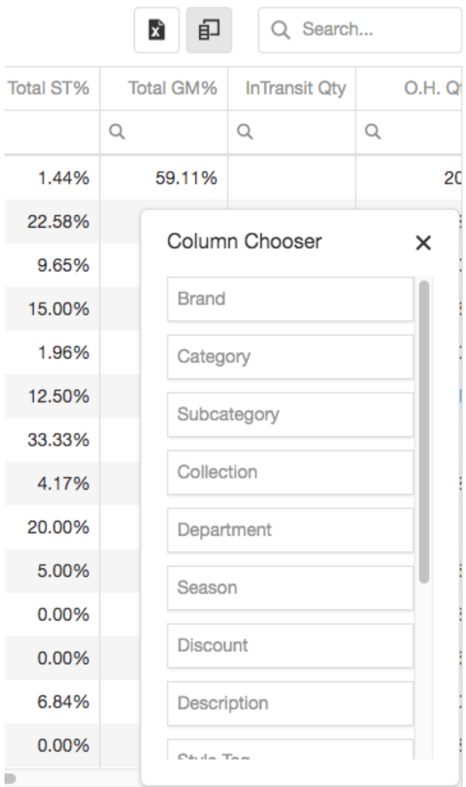
Note on Total Qty, Total ST%, and Total GM% Columns

For styles and SKUs that are older than the last RMS data cleanup, ignore the Total Qty, Total ST%, and Total GM% in the Style Performance Report, as these columns may not be accurate.

We recommend that you use the Column Chooser to remove these columns from the report to avoid confusion. This will not affect the usefulness of the report.

Column Chooser

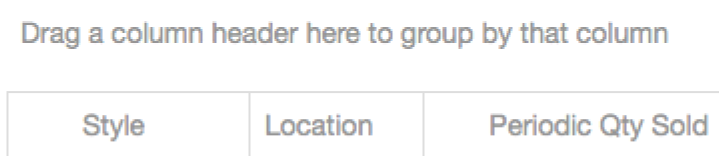
To add a column to the report, drag the column from the Column Chooser into the report. To remove a column from the report, drag the column from the report into the Column Chooser.



Grouping Your Report Results

Any groupings you add in these steps will be saved in your browser's cache and reflected in any tabs open to the report. These changes will also be reflected in any exports of the report as well.

1. To group your report results by a particular column, drag the column header to the top of the report to where it says "Drag a column header here to group by that column." Alternatively, you can right-click on the column header and select "Group by This Column."



2. You may add more groupings by dragging more column headers into the top of the report. The report will group the results in the order of the columns you have selected.

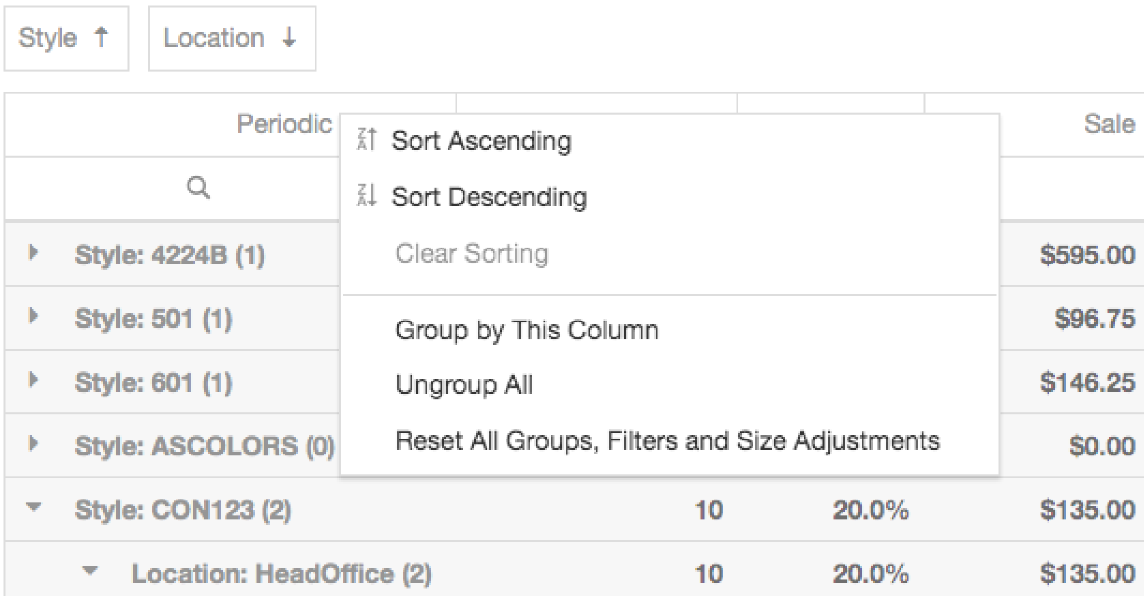
3. If needed, click the column header to change whether the results are ascending or descending. You can sort one column by ascending, and another by descending, if needed.

4. To expand the report details by your selected groupings, click on the triangles found next to each row.

Periodic Qty Sold	Periodic Qty O.H.	ST%	Sale	GM$	GM%	Total Qty	Total ST%
Style: 4224B (1)	206	0.5%	$595.00	$363.23	61.0%	3	1.44%
Style: 501 (1)	24	4.2%	$96.75	$37.97	39.2%	1	4.17%
Style: 601 (1)	15	6.7%	$146.25	$81.60	55.8%	2	12.50%
Style: ASCOLORS (0)	30	0.0%	$0.00	$0.00	0.0%	0	0.00%
Style: CON123 (2)	10	20.0%	$135.00	$15.30	11.3%	2	20.00%
Location: HeadOffice (2)	10	20.0%	$135.00	$15.30	11.3%	2	20.00%
2	10	20.0%	$135.00	$15.30	11.3%	2	20.00%

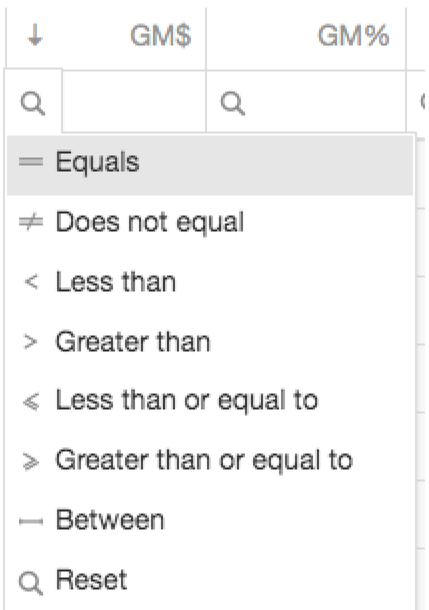
Undoing a Grouping

To undo a grouping, right-click on the column header and select “Ungroup” to undo the current selection, or “Ungroup all” to undo all grouping selections. You can also drag a column header back into the report to undo the grouping.



Filters

1. You can apply filters for each column by clicking on the search icon below the column header. Each column will show the filter settings that can be applied to the column's data.



2. Enter the text that you wish to be applied to the filter. The filter "Does not contain" will <u>exclude</u> any results you enter into the filter.

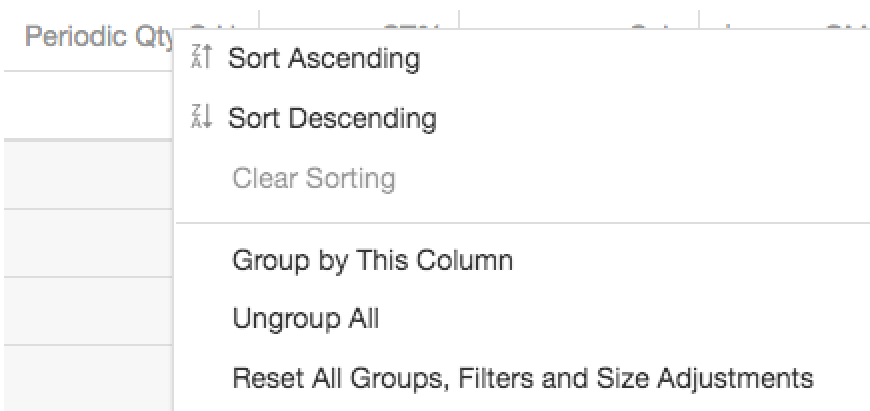
3. To filter by a percentage, convert the number to decimal point format before entering it into the filter.

Saving Your Filters and Groupings

Your browser's cache will remember any filters or groupings that you have applied to your report. If you have the report open in more than one tab, it will save those settings across multiple tabs.

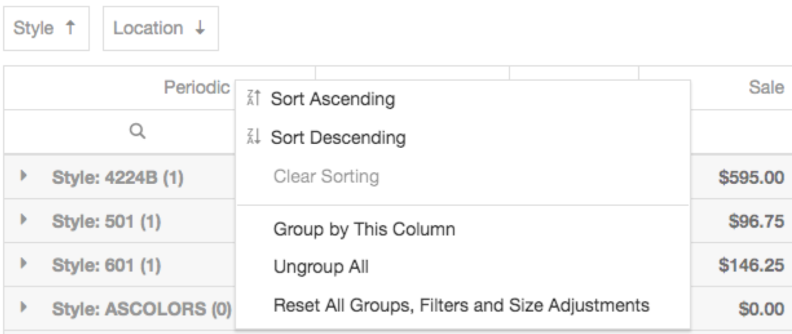
If you clear your browser's cache, the saved filters and groupings will be deleted.

If you wish to export your report, keep in mind that the exported file will reflect any filters and groupings that have been applied. If you wish to export your report without any filters or groupings, be sure to follow the instructions below for reverting the report to its original state.

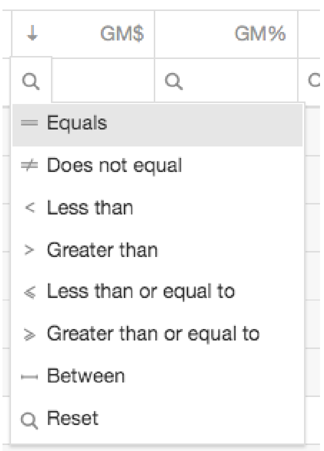


Resetting Your Filters and Groupings

1. To undo a grouping, right-click on the column header and select “Ungroup” to undo the current selection, or “Ungroup all” to undo all grouping selections. You can also drag a column header back into the report to undo the grouping.

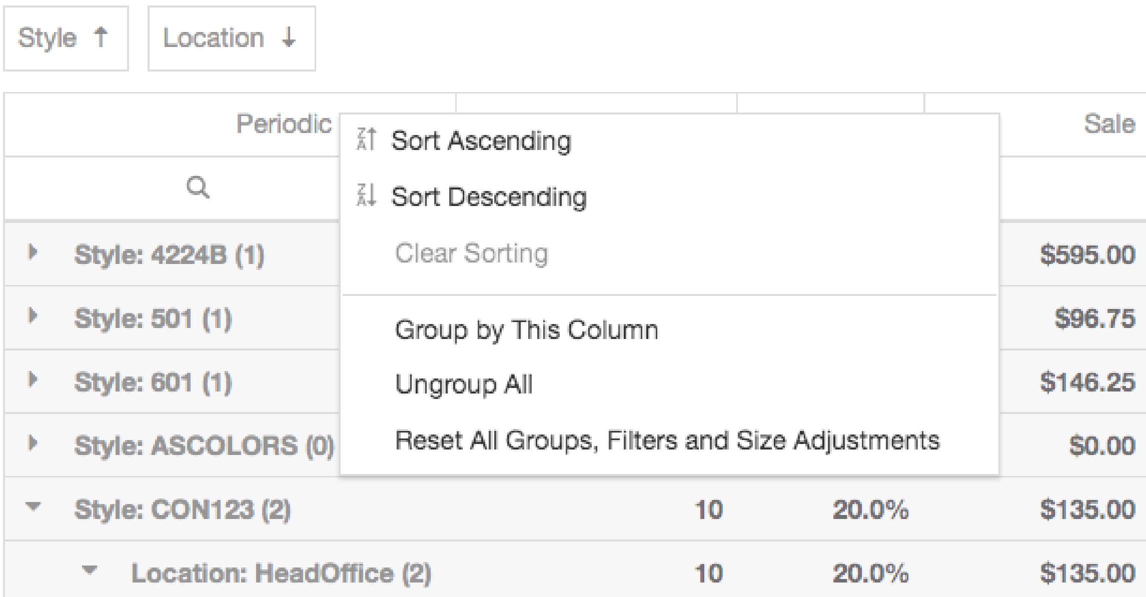


2. To reset a filter, click on the search icon in the column and select “Reset” from the filter menu.



3. To revert the report to its original form, right click on any column header and select "Reset All Groups, Filters, and Size Adjustments," as seen in the screenshot below.

   If you added or removed any columns, you will need to revert those changes manually by using the Column Chooser.



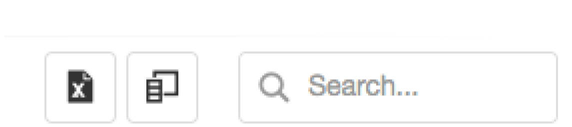
Report Link & Sharing

You can copy and forward the link that you see in your browser's location bar when you view the report. This link can be sent to anyone so that they may view the report. They do not need to be a MultiFlex Business Intelligence Tool user to view the report.

Exporting Your Report

Before you export your report, note any filters or groupings that have been applied to the report. If you do not want any filters or groupings applied to the exported report, be sure to reset these settings before you proceed.

To export your report, click the Export icon found next to the Column Chooser icon. The icon is a file with an "X" on it.



Deleting Reports

If you wish to delete a report, you can click "Delete" in the Report menu. The system will ask you to confirm that you wish to delete the report. Reports are kept in the system for up to 90 days if you do not delete them.

Test Report 2	Style Performance Report	1/16/2020, 3:48 PM	10089	carolynmduncan@...	Delete