ShopVisible™

Enhanced Reporting Guide

A Guide to Using Enhanced Reporting in the ShopVisible Platform.

ShopVisible Enhanced Reporting

Overview

This guide provides a high level overview of the ShopVisible Enhanced Reporting tool. This guide walks you through the tool by showing the basics of navigation, use, and generating a report, so you will be knowledgeable enough to work with this tool.

Goals of This Guide

After reading this guide, you will be able to:

- Describe the importance of the tool as it relates to creating customized reports
- Access Enhanced Reporting within the Site Manager
- Comfortably navigate through each tab of the tool and be familiar with the options accessible
- Understand the use of the relational database illustration
- Describe how data in a basic report is built and can be organized through visual grouping, subtotals and a summary.
- Identify the various chart options available to select to visually illustrate report data and label chart components.
- Identify how to access, edit or delete a report and specify header and footer details
- Schedule a report to auto run and setup a distribution list
- Identify the various methods to export a report
- Describe how to configure a dashboard view

Topics Covered

The following topics will be covered in this guide.

- Accessing and Navigating within the Enhanced Reporting Tool
- Building a Report
- Saving and Accessing a Report
- Overview of Exporting Report Options
- Adding and Adjusting Data in an Existing Report
- Visually Grouping Data
- Working with Charts and Graphs
- Advanced Options for Charts and Graphs
- Adding a Chart Title
- Setting Auto Distribute Options
- Configuring the Enhanced Reporting Dashboard

Introduction

While the ShopVisible platform offers many reports for you to access under the Analytics Tab, these are standardized reports. Constructed to provide you with data and results from the system, these reports while effective for their purposes don't provide you many options to pull or look at the data in different ways.

Through ShopVisible's Enhanced Reporting services, the reports are only limited to the information you want to analyze. This tool provides you with the access to generate reports based on the data you deem important and critical to your business needs and processes. Reports built through the Enhanced Reporting service can be as complex and as involved as you like… constructed to show you years of data or a day's worth and incorporating information from a vast selection of available data fields.

Enhanced Reporting is a tool that is relatively easy to learn and use for the depth and power of reporting that it can provide.

Not only does this tool provide you multiple ways to compare, sort, and analyze results, it's a tool that matches your needs and schedule, since you can access real-time data when you need it.

When you generate a report, you can customize it to match your business needs, without involving ShopVisible IT or database experts. This is something our standardized reports do not provide.

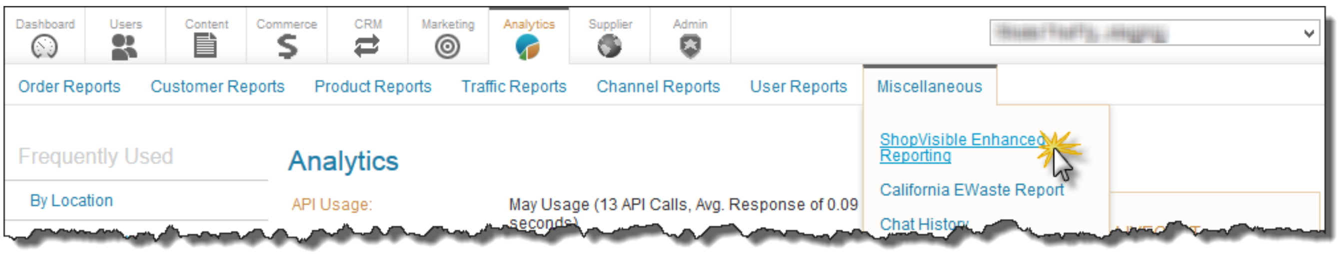
Information is key to running any business. Business owners and decision makers rely on reports to run their operations for an array of reasons — to make better decisions, to increase efficiencies, to service customers more effectively and to respond more quickly to threats and opportunities. Enhanced Reporting provides you unparalleled access to mission critical data in the form you need, when you need it.

For those that say knowledge is the answer, then this tool is the key that's needed to unlock that door.

Accessing and Navigating within the Tool Area

Accessing Enhanced Reporting

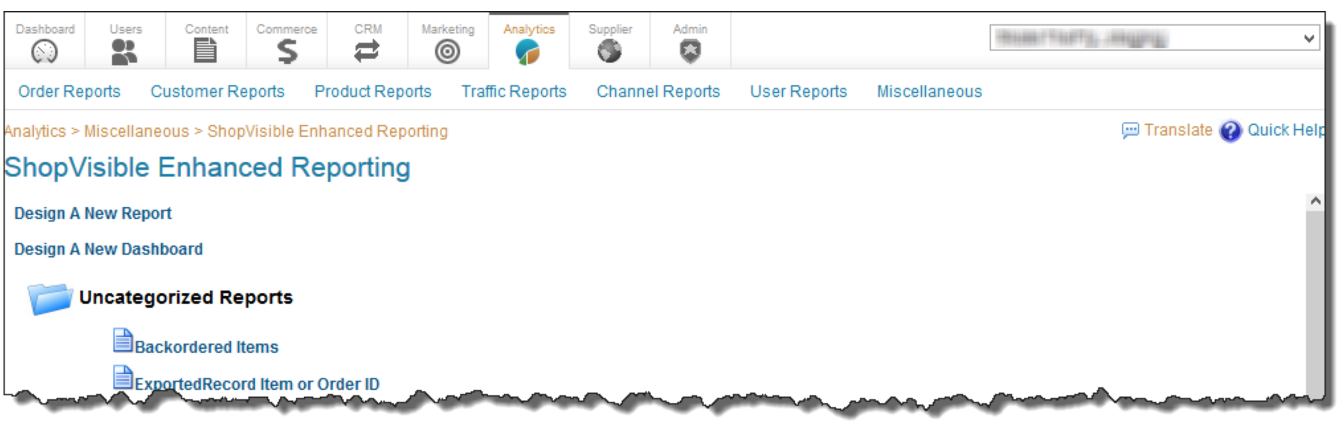
After accessing the Site Manager, navigate to the Enhanced Reporting tool. Follow this path: Analytics > Miscellaneous > **ShopVisible Enhanced Reporting** and the Enhanced Reporting tool will load.



Understanding the Report List Window

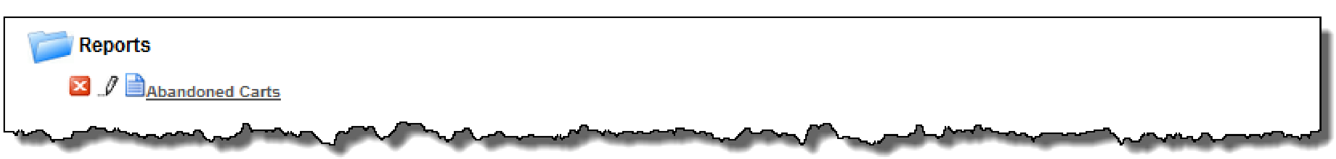
When the Enhanced Reporting tool loads, the **Report List** view will display. Click on a folder to show or hide its reports content. When reports are created, they can be grouped within folders and new folders also can be created to hold reports.

Reports are identified by a report icon and are located within folders. The report's name is a link that when clicked, will run the report and then display its results.

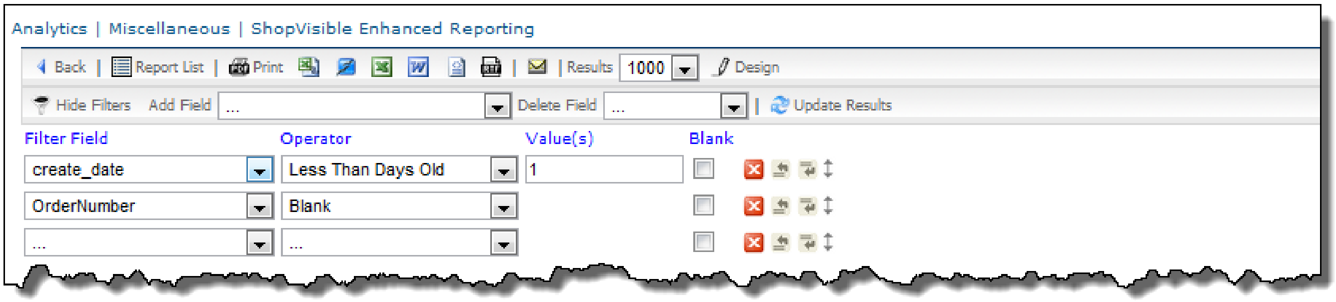


Mouse over an existing report's link and you'll see its edit and delete functionality. Click the red **"X" box** to delete a report. Click on the **pencil** to view and edit a report.

Click on the **report's name** and a loading graphic will appear while the report is querying the database. This can take several seconds depending upon the size of the data query.

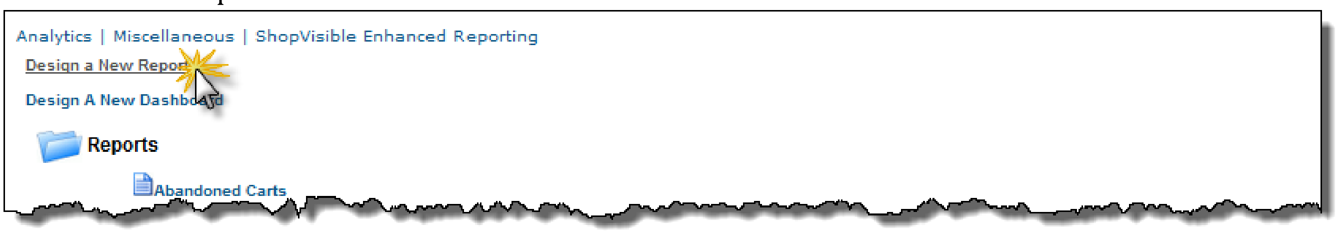


The settings of this report will appear. From here you can add, edit, or remove fields. You can also choose to print or export the report by using the operators located at the top of the window. These will be discussed later in this guide. The reports that are created contain real time data.



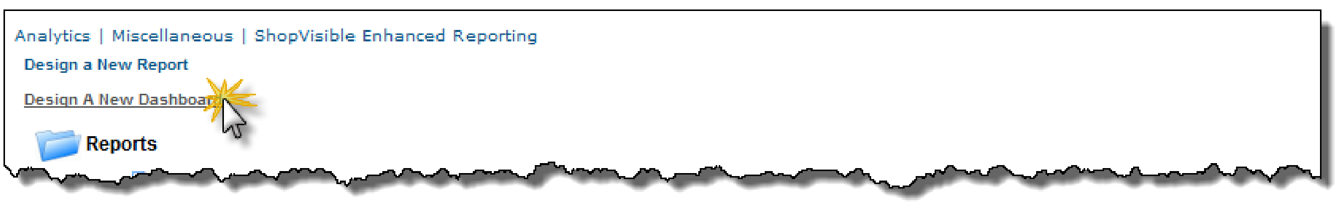
Designing a Report

To open the controls to design a new report, click **Design a New Report.** Later in this guide, a high level overview of the options available will be covered.



Designing a Dashboard View

To open the controls to setup and **Design a New Dashboard** for the Enhanced Reporting tool, this link is clicked.

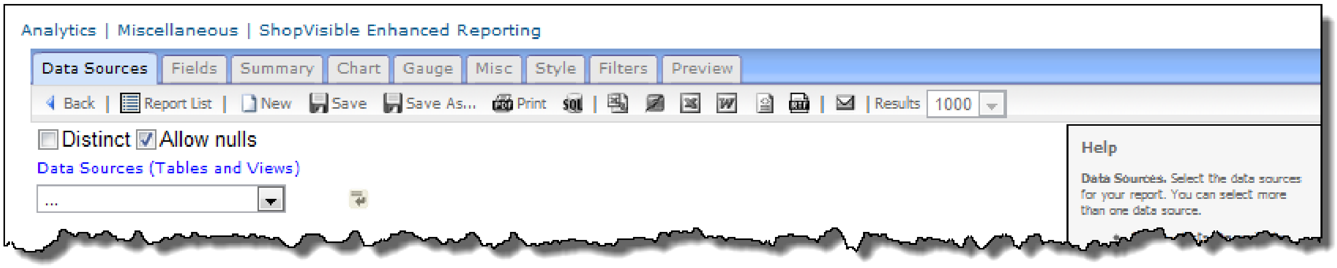


The dashboard provides you the ability to specify which report's graphs and charts will display upon accessing this tool. More on this aspect of the tool is provided later in this guide.

Navigating Within the “Design a New Report” Area

Designing a new report can be relatively straight forward. Open the Designing a New Report link to open the New Report Area and review the following navigational options. While not all options are enabled when this page loads, the following general navigation options are available:

- **Back –** This option returns the user to the main ShopVisible enhanced reporting page.
- **Report List –** This option returns the user to the main ShopVisible enhanced reporting page.
- **New –** This option loads a blank report page so a new report can be created.



The other options on this tab and even other tabs are disabled until a report is created.

Building a Report

Distinguishing Between Report Options

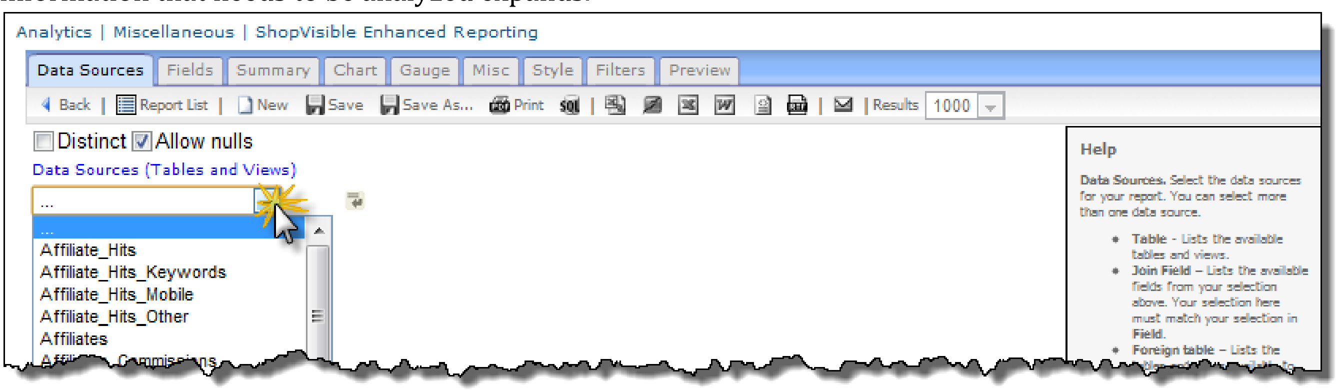
There is a difference between the distinct and the allow nulls options.

- **Distinct –** This option means there won't be any duplicates returned when the report is created.
- **Allow Nulls –** This option means that you will allow data to be returned when some of the data points do not have values and are blank.

Selecting Data Sources

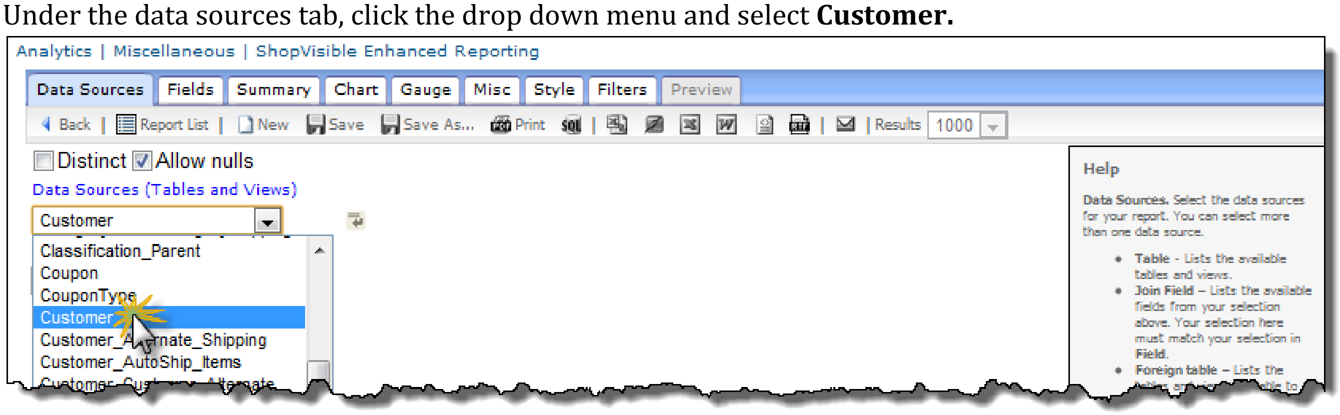
Click the drop down box to view all accessible **Data Sources** that you have to choose from. You can select more than one data source if you need to work with data from more than one data table.

In this lesson you will build a report to see the ease of which the Enhanced Reporting tool can be used. This initial report will form the core and you can add additional data sources and fields as the scope of the information that needs to be analyzed expands.



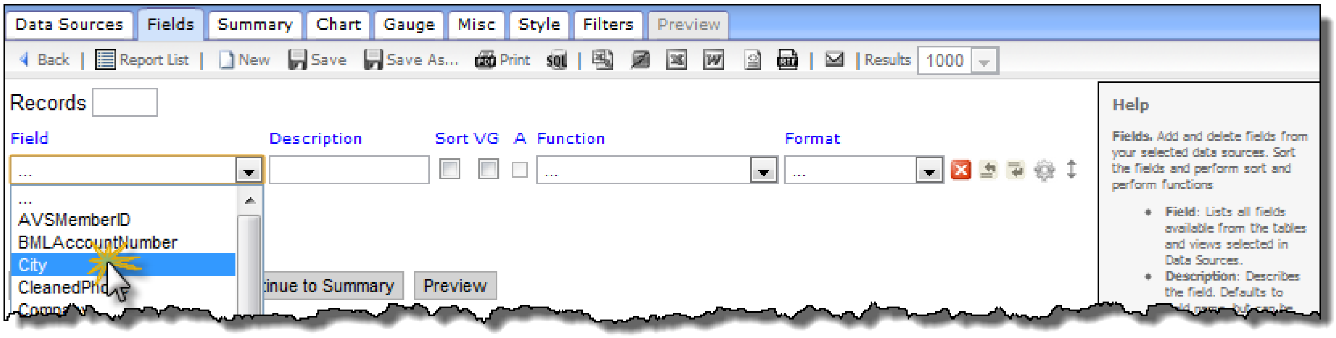
Let’s generate a report that displays customer data that’s been collected in the system. This will be for those who have purchased items and have an order history, as well as those who have registered on the site by providing these details and clicking on their contact information, but who may not have ever purchased anything.

Under the data sources tab, click the drop down menu and select **Customer.**

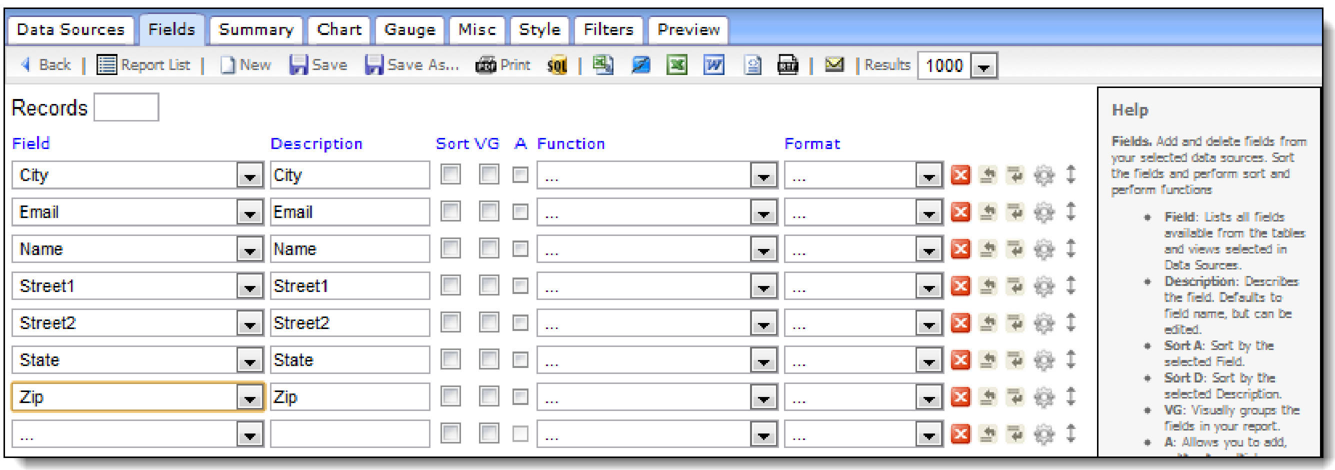


Fields

Next we'll identify the use of the **Fields** drop down menu based on the data tables specified on the Data Source tab. The fields of the data tables, from those specified on the first tab, can be selected to direct the report to access and pull in record details.

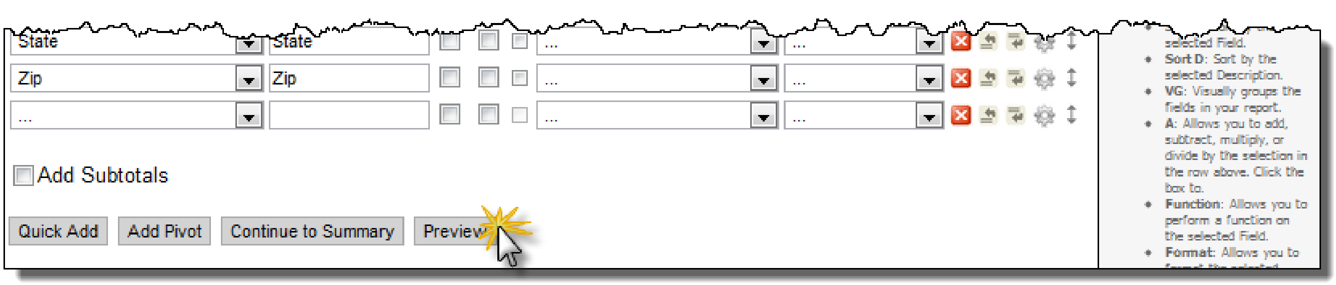


To continue building the example report, under the **Fields** drop down menu, click and add the following fields: City, Email, Name, Street 1, Street 2, State, and Zip. The **Descriptions** entry defaults to the same entry that's listed in the Field column. However, the information in these columns can be edited. For example, you can rename your columns with the same titles you may be already using elsewhere.

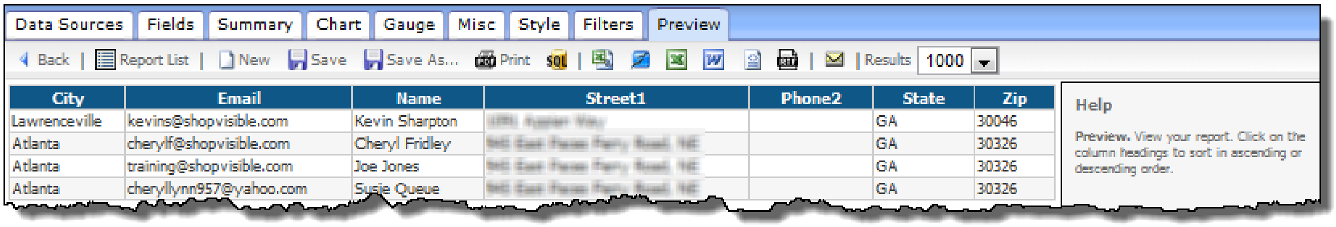


Previewing the Report

Click the **Preview** button to view the report given the data source and fields selected.



When the report loads, click on a **column header** to sort the data by that column. The report will show a list of customers with their contact information; however, the list will contain customers who have purchases on record and those guests to your site who have registered, but have not as yet purchased any items.

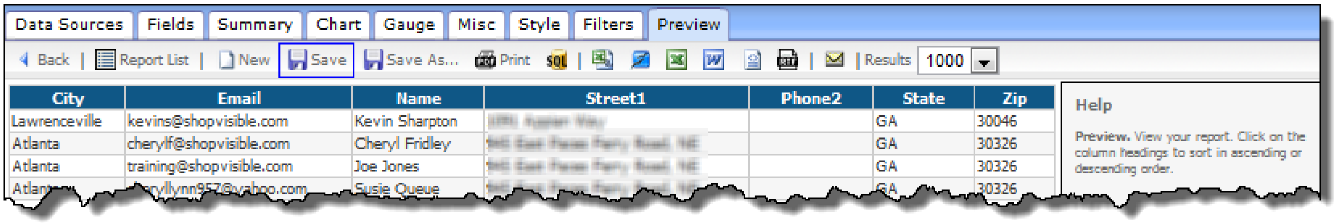


How do you know who has made purchases? We'll answer that question coming up when we add more fields to expand the scope of the report.

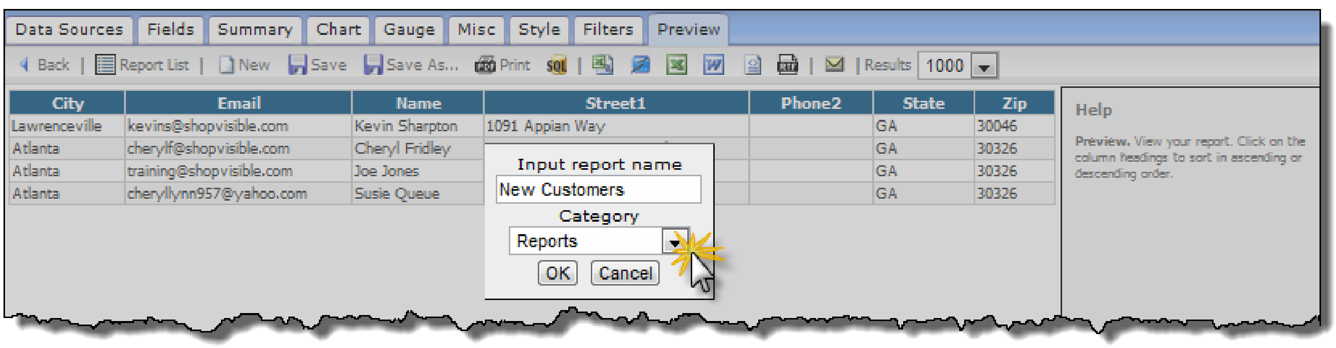
For now, let's save the report.

Saving and Accessing a Report

To save the report the first time, click **Save As** and then enter a title for the report. This will become the title displayed as the report's link in the Report's List. As with all reports, you should establish a pattern of saving the report regularly to ensure all details are preserved. Simply click Save from time to time to accomplish this.



When the small window appears, select the **Category** folder where the report will be saved, or create a new one. Click the **OK** button and you now have created and saved a basic Enhanced Report. Check your work by clicking the **Report List** button to return to the Report List window.



As you can see here, the **New Customers** report you just created, is now available in the Reports file.

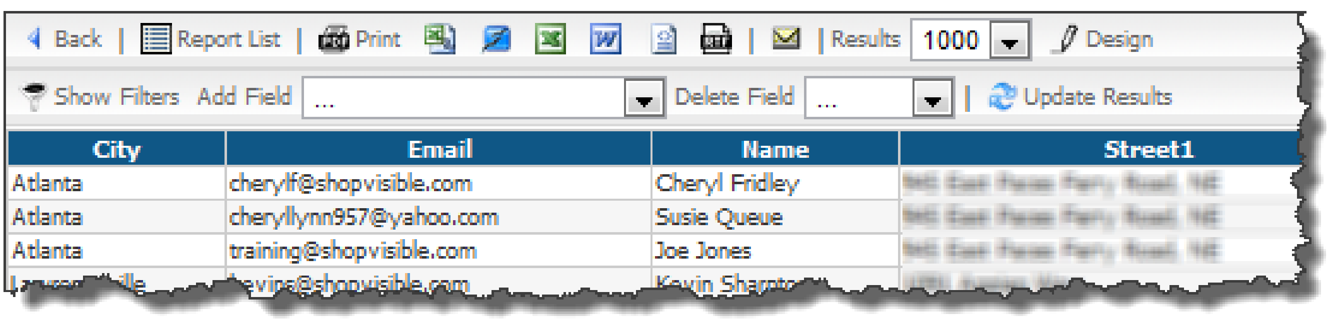
Exporting Report Options

Exporting and Editing a Report

Once a report is created, there are many options for exporting the report to work within other programs. You may want to do this to view the report or for further analysis outside the Enhanced Reporting tool.

- **CSV File –** Exports the report as a comma separated file that then can be loaded as a spreadsheet.
- **Open Office –** Exports the data as a file that is compatible with Open Office.
- **Excel -** Exports the data as an Excel spreadsheet file.
- **Word -** Exports the data as a Word file.
- **XML -** Exports the data as an XML file.
- **RTF -** Exports the data as an RTF file.

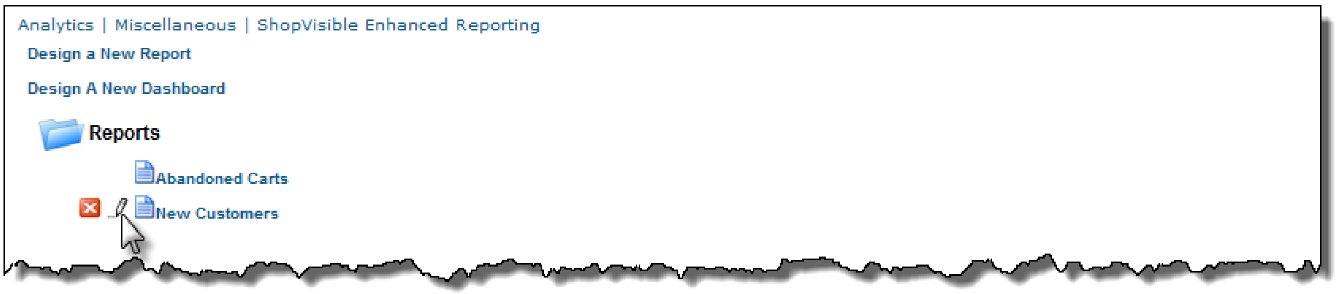
You can also export the report to **Print** which will create a .pdf file. The **Design** button will return you to the design interface.



Editing Data in Existing Reports

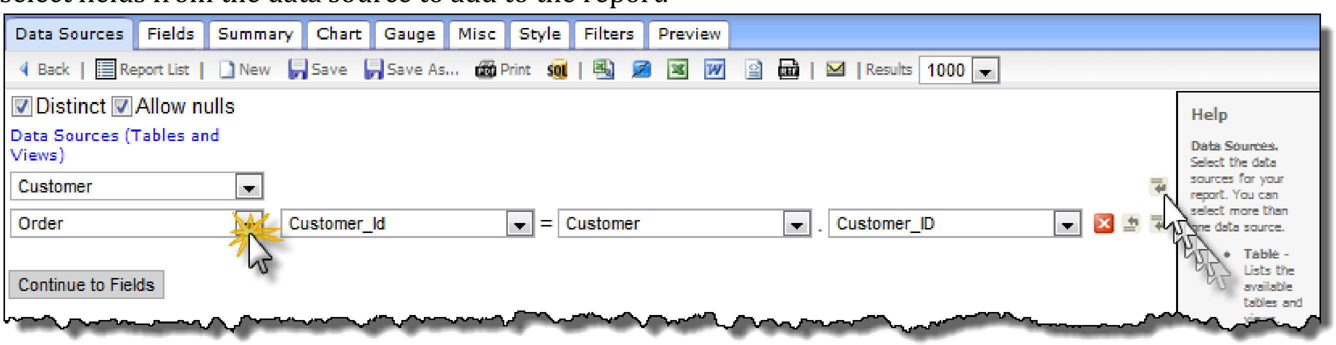
Adding More Data and Information to the Report

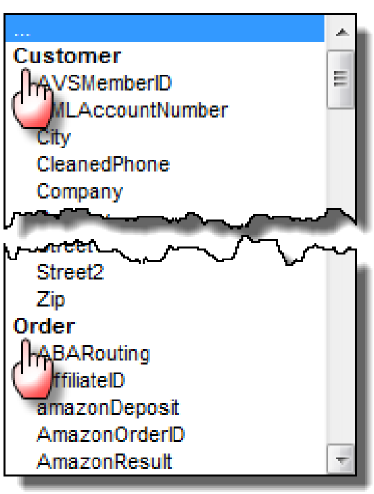
Since we have a report that shows customer information, let's see which entries correspond to actual customers who have made purchases by associating an order number in the system to customer data. To edit the report that was just created, click the pencil icon next to its name.



Once the editable fields open, click the **Data Sources** tab and you can now add other data sources. Click the add **Data Sources** button and then with the next drop down arrow, choose **Order.** After you do this, the fields should automatically populate. For this example, verify the summary and data table that was added associates the following keys correctly: **ORDER, CUSTOMER_ID = CUSTOMER, CUSTOMER_ID.**

Once the additional data table has been made accessible to the report, click the Fields tab to locate and select fields from the data source to add to the report.



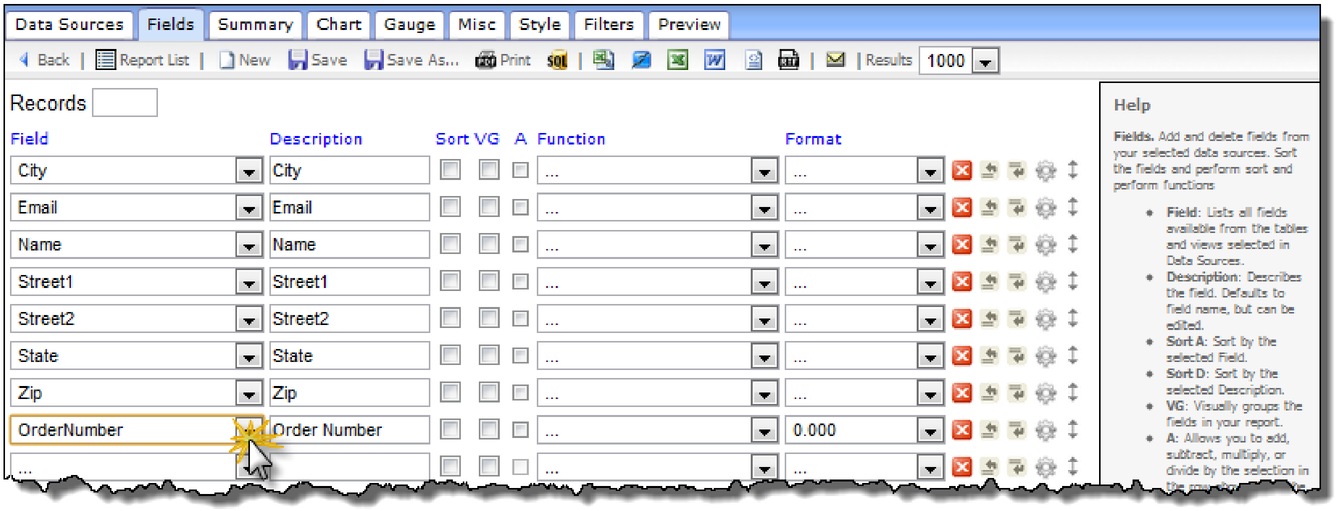


Identify that the Field drop down menu now includes a list of fields that are accessible from the **Customer** table and the **Order** table.

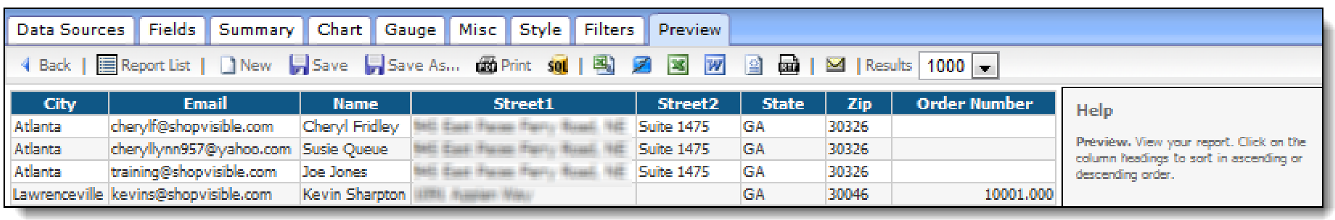
If you continue to build this report, the information in this data table will appear once you have set it in the Data Sources tab. For example if you set Product as a Data Source, once you return to the Fields tab, you will see all of the record options for Product available from the drop down field.

You can continue to build an extremely detailed report by selecting as many Data Sources as needed for a robust report.

Select the Order Number field from the Order section of the list.



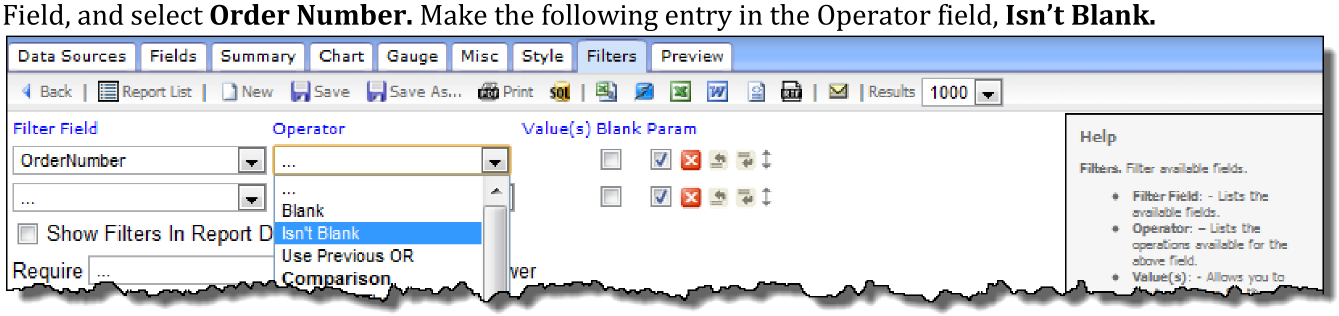
Click the preview button to view the updated report, which will now contain order numbers that are associated to customers. For customer data where there have been no orders, the column will have a blank cell.



Modifying the Report to Display Order Data

Since our order numbers do not have decimal points, the formatting of the Order Number column can be cleaned up to only show the number with no decimal places and since there are some blank cells, this indicates customer data that is not associated with an order so it can be removed from the list as well. To reformat the **Order Number** column, click the Fields tab and change the formatting to display as the numbers are pulled from the database.

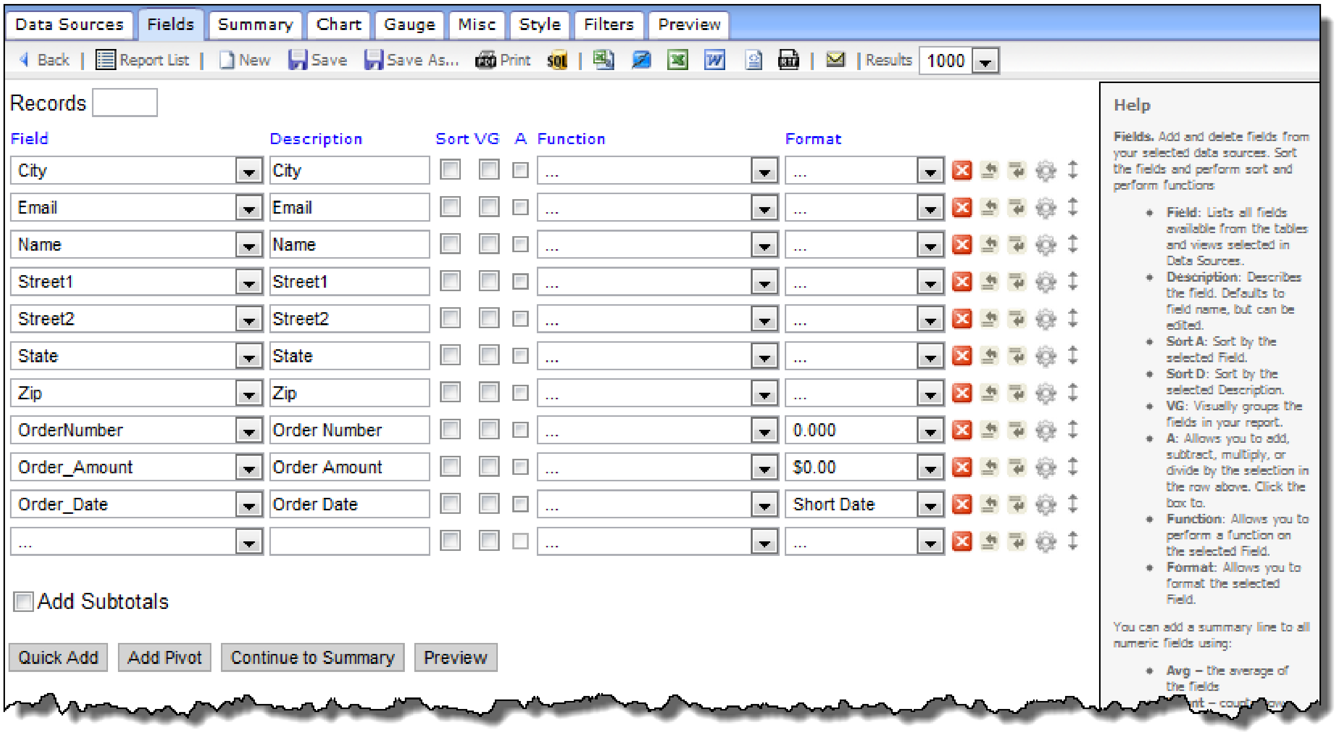
To remove the blank cells, where there is not any order data associated with a customer entry, and since the customer has not a made a purchase, click the **Filters** tab, scroll down to the Order area in the Filter Field, and select **Order Number.** Make the following entry in the Operator field, **Isn't Blank.**



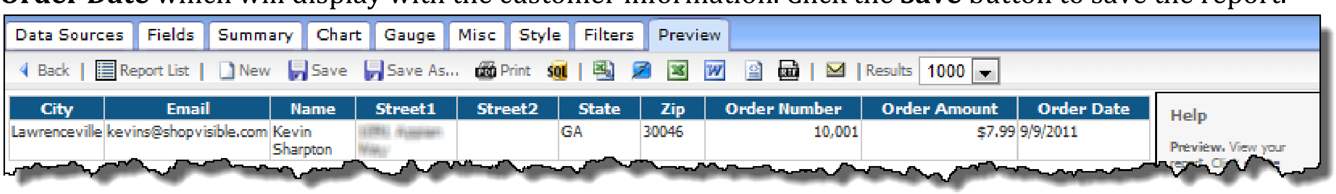
Numerous options are available under the Operator menu field. All of these options will help you to fully customize your report.

Go back to the Fields tab. To pull in the amount of these orders, add the **Order Amount** field. This field automatically changes its format to currency ($0.00).

In our example, let's add some more order information, which is helpful when analyzing data. Let's add the date of these orders in the report. To do this, add the following field, **Order Date.** Click to **Preview** the report.

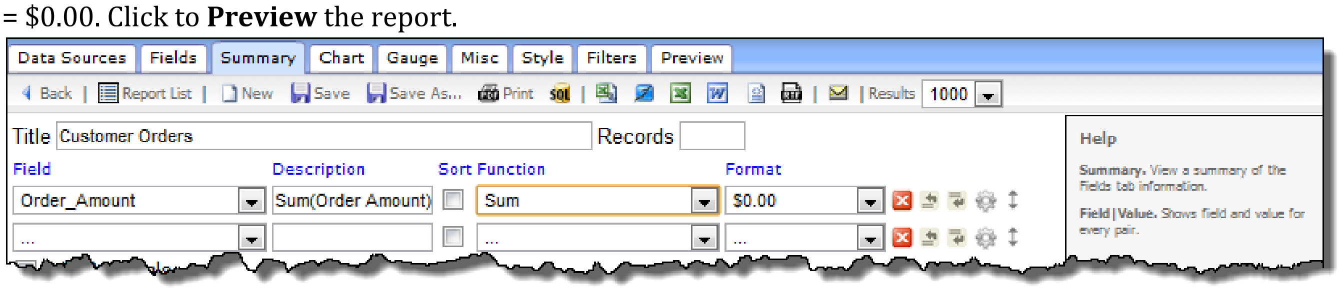


When the report opens, you will see the additional information of **Order Number, Order Amount, and Order Date** which will display with the customer information. Click the **Save** button to save the report.

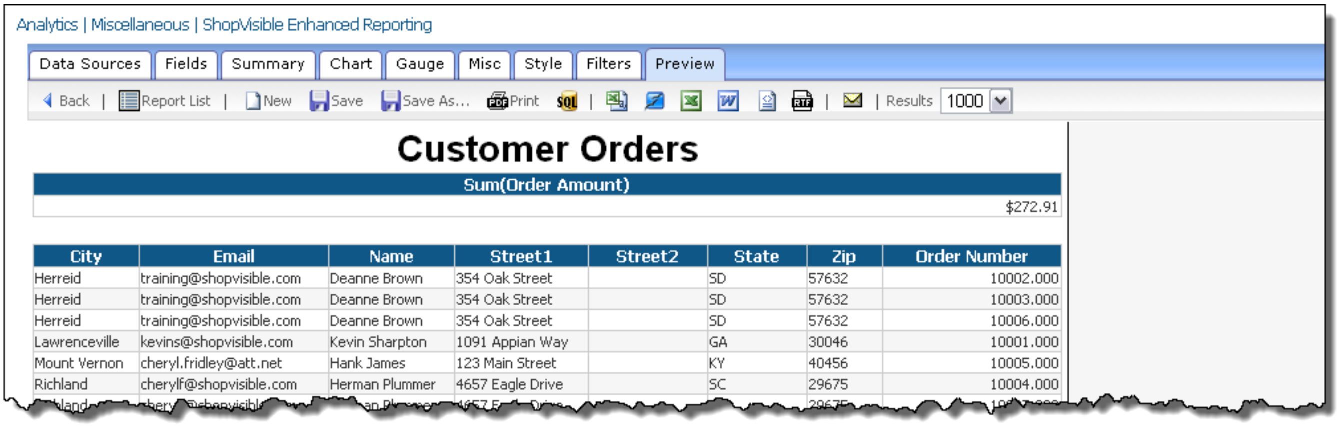


Adding a Summary to a Report

Add a summary to help provide an at-a-glance feature to the report. Click the Summary tab and complete the following items. Add a Title to the summary area of the report. Select the field of data that will be summarized. In this example make the following entry: Field = Order Amount, Sort Function = Sum, Format = $0.00. Click to **Preview** the report.



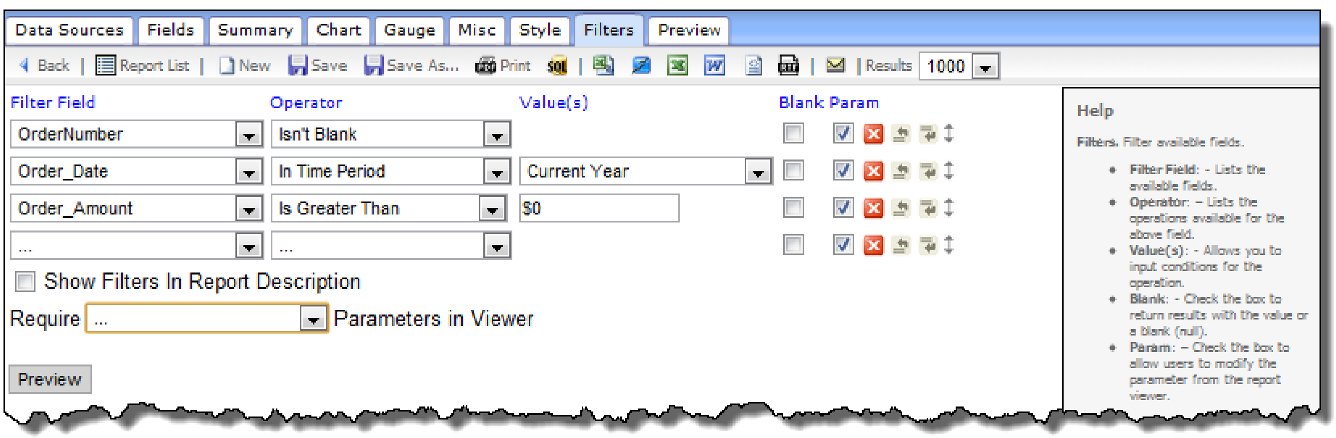
Along with the previous information that is still visible, you will see the **Sum (Order Amount)** for all customer orders.



Adjusting Filers

Since the report includes data from all orders, let's narrow this information, such as a header and footer to display customer orders from only this year. We will use filters for this. Click the Filters tab and add the following two filters. In the Filter Field choose Order Date, set the Operator to In Time Period, and the Value at Current Year. In the next field choose Order Amount, the Operator Is Greater Than, and the value should be set to $0.

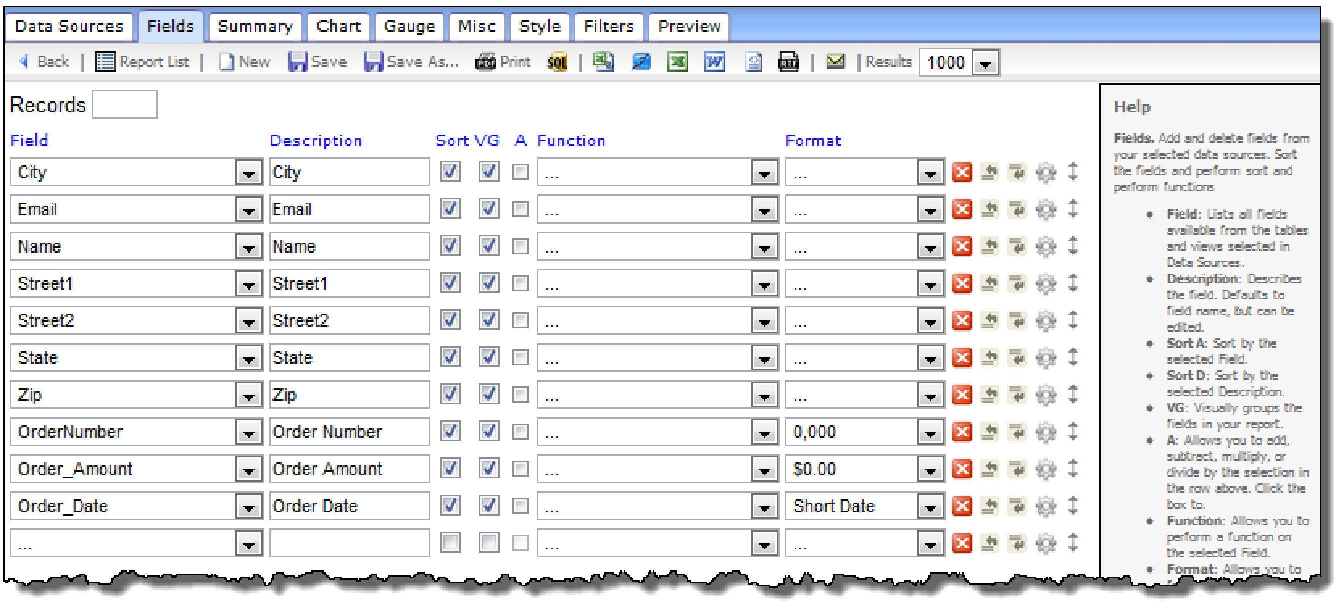
As you can see, these Field and Operator selections automatically added the Values fields, where the Order Number selection did not. The **Param** option can be left checked to allow for further control of this data aspects from the report view. Click the Save button to save the report. Click Report List to return to it.



Visually Grouping Data

Next, let's group individual customer purchases together so there is a total for each and visually separate one customer from the next.

Visually Grouping allows the report to separate information between unique data points. We can visually group the report per customer by checking the check box to **VG,** which stands for visually group. When this is done, the checkbox next to VG, **Sort** also checks itself by default. Leave this checked and preview the report.



We now have a report that is separated and sorted by customer name (first name) and includes each customers' total purchases summed.

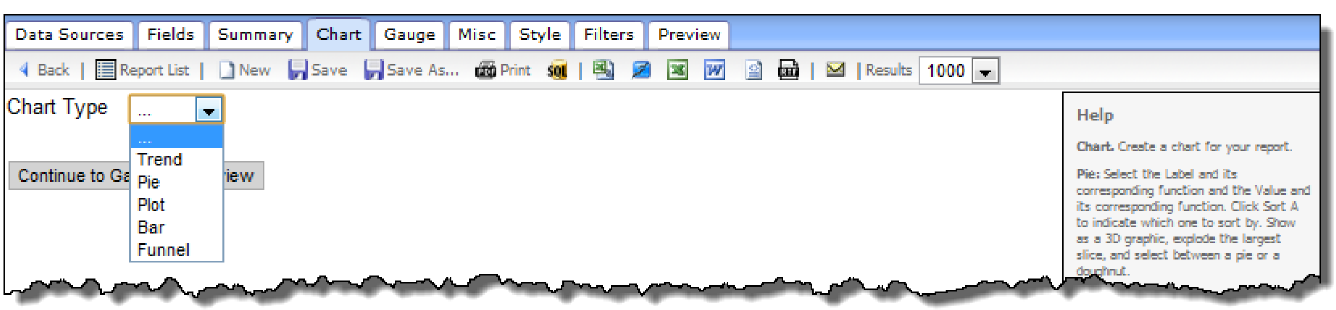
Working with Charts & Graphs

Chart and Graph Options

We've established that we can specify data tables and select fields from within those tables to pull into a report. Furthermore, we've filtered aspects of a report and added titles. Next, let's add some visual representation of the data in the report by configuring a chart to display.

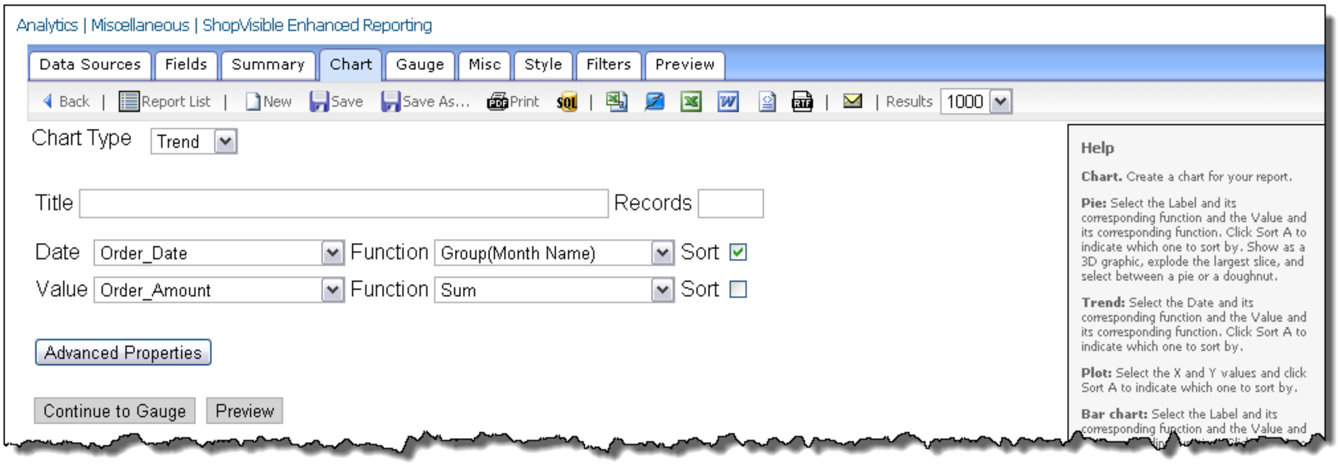
Click on the Chart tab. In the Chart Type drop down field, you will see there are five different types of charts and graphs available.

- **Trend –** Select the Date and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.
- **Pie –** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by. Show as a 3D graphic, explode the largest slice, and select between a pie or a doughnut.
- **Plot –** Select the X and Y values and click Sort A to indicate which one to sort by.
- **Bar Chart –** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.
- **Funnel Chart –** Displays a greater to less illustration in a funnel shape to illustrate at the top the data point that has the most and then continues downward.

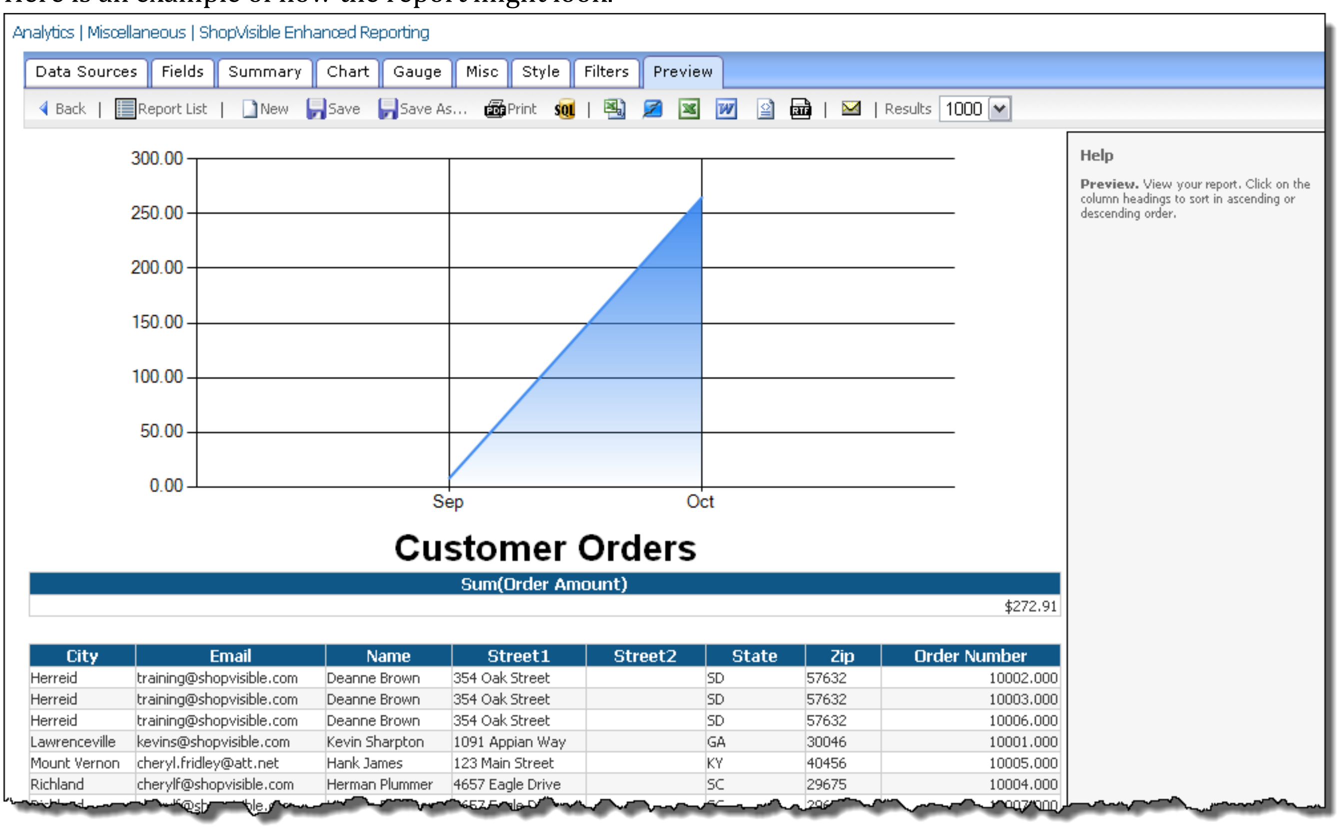


Viewing a Trend Chart

Let's work with a trend chart to see what trends exist with our data and make the following selections. Select the **Trend** Chart Type. Type in a **Title** for your chart. For this example for the **Date** choose "Order Date" and "Group (Month Name)" as the date **Function.** Choose "Order Amount" for the **Value** and "Sum" for the **Function.** This will position a chart above the data summary and customer entries. Click to **Preview** the report.

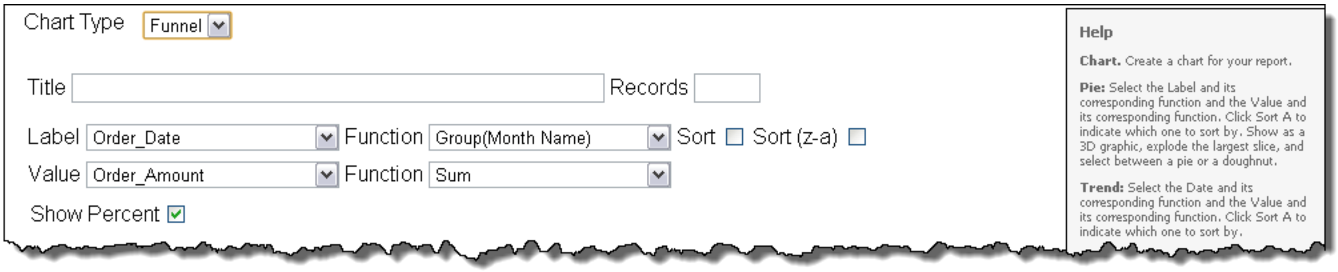


Here is an example of how the report might look.

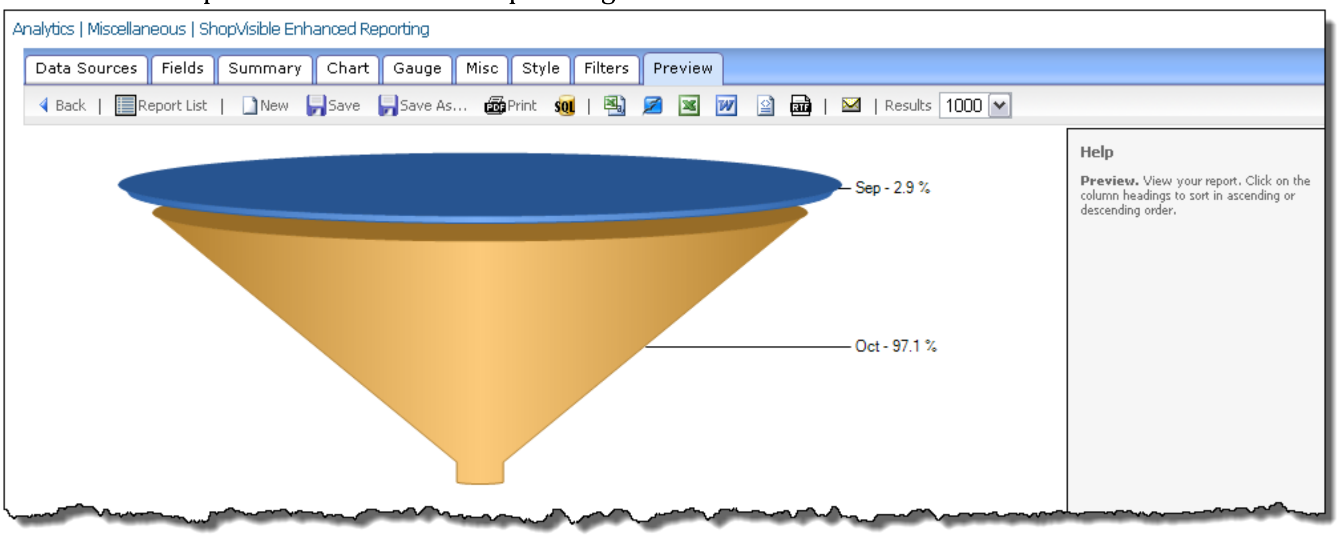


Viewing a Funnel Chart

Click on the **Chart** tab and choose **Funnel** for the **Chart Type.** The options for this type of chart change to Label and Value.

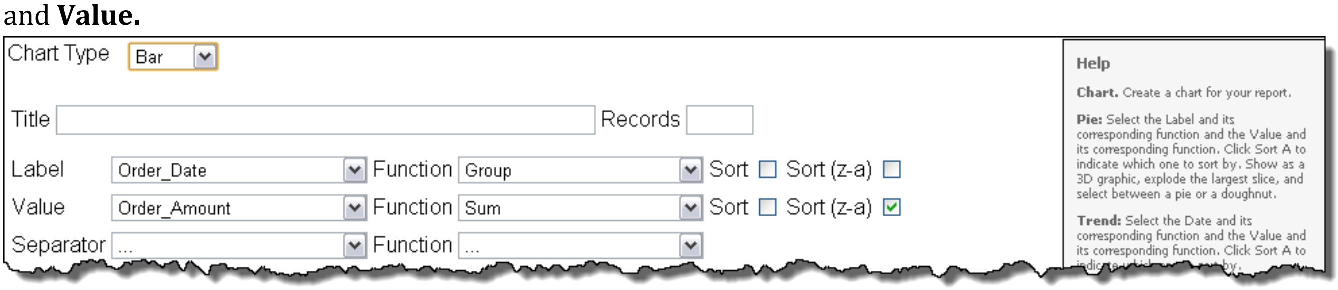


Here is an example of what the funnel report might look like.



Viewing a Bar Chart

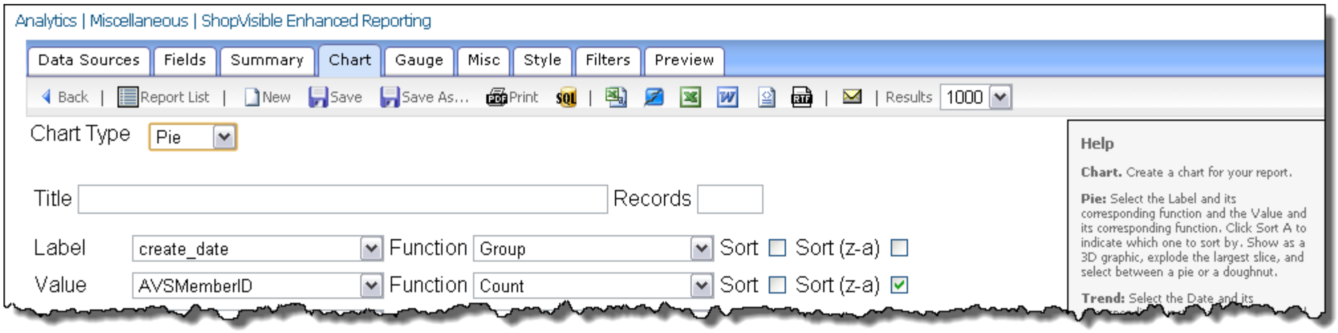
Click the **Chart** tab and choose **Bar** for the **Chart Type.** The options for this type of chart change to **Label** and **Value.**



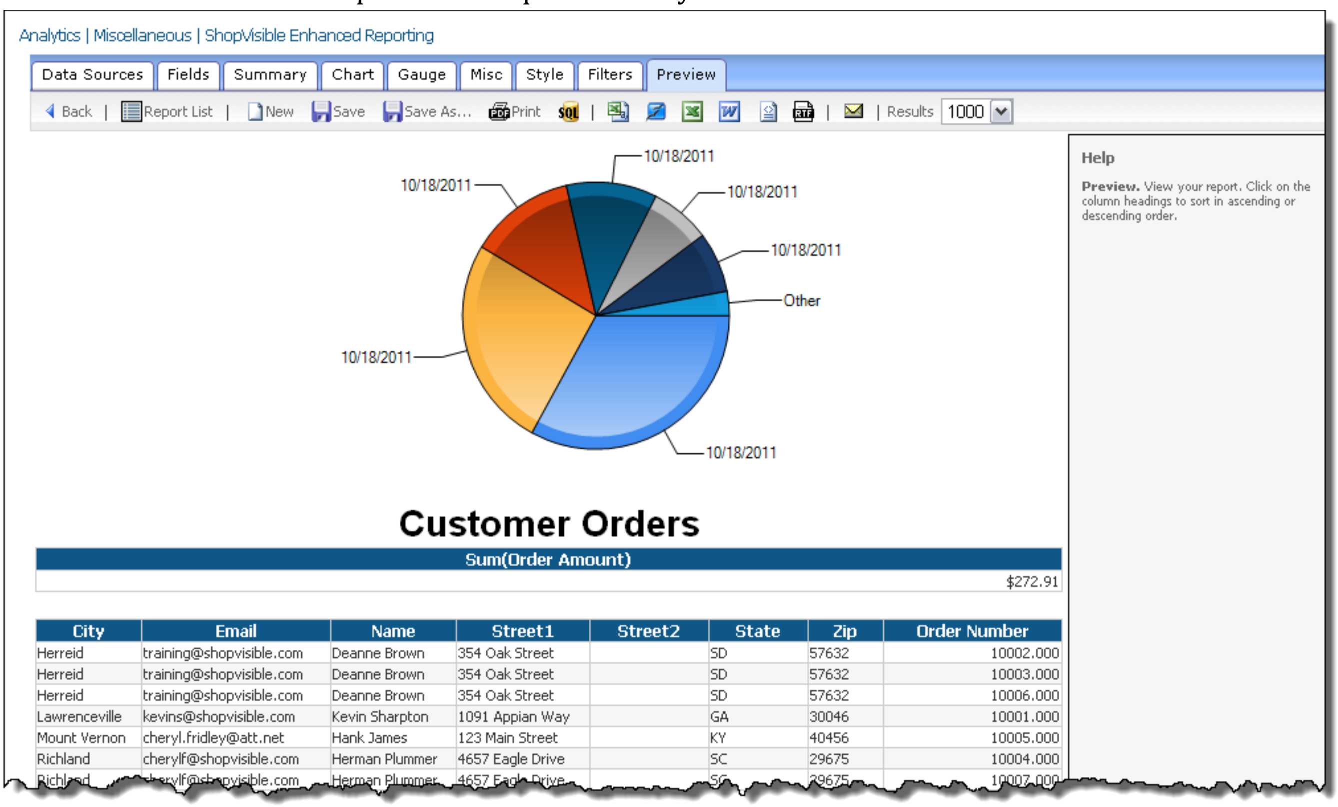
As with other reports, click to **Preview** the report.

Viewing a Pie Chart

As with the other reports, click on the Chart tab and select Pie for the Chart Type. Click to Preview the report.



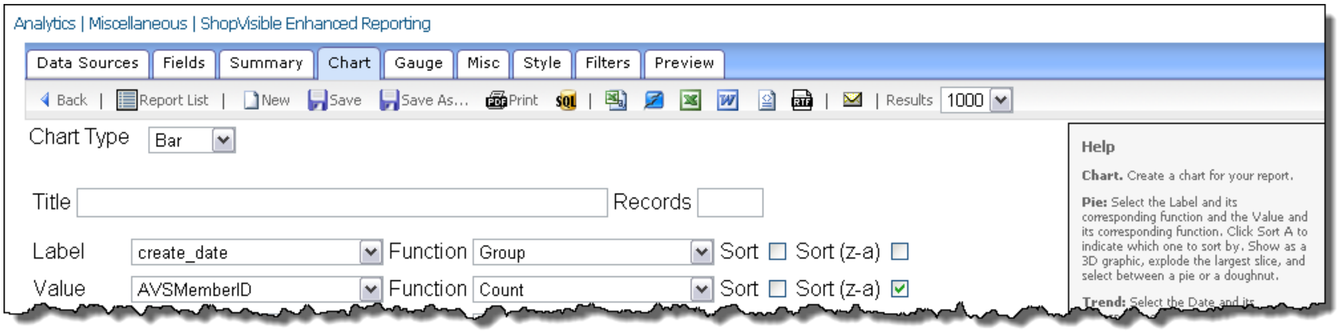
Illustrated below is an example of what a pie chart may look like.



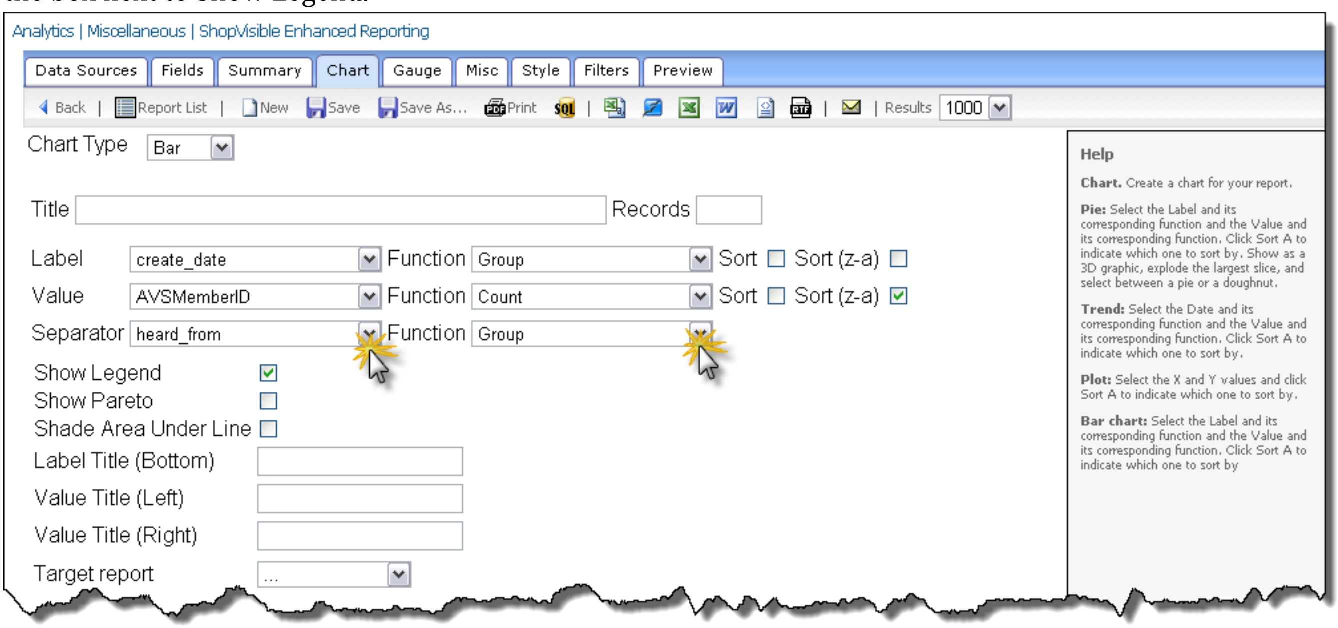
Advanced Options

Adding a Separator to a Bar Chart

To add a separator to a bar chart, click the **Chart** tab and then click on **Advanced Properties.** This will add more options to this screen.



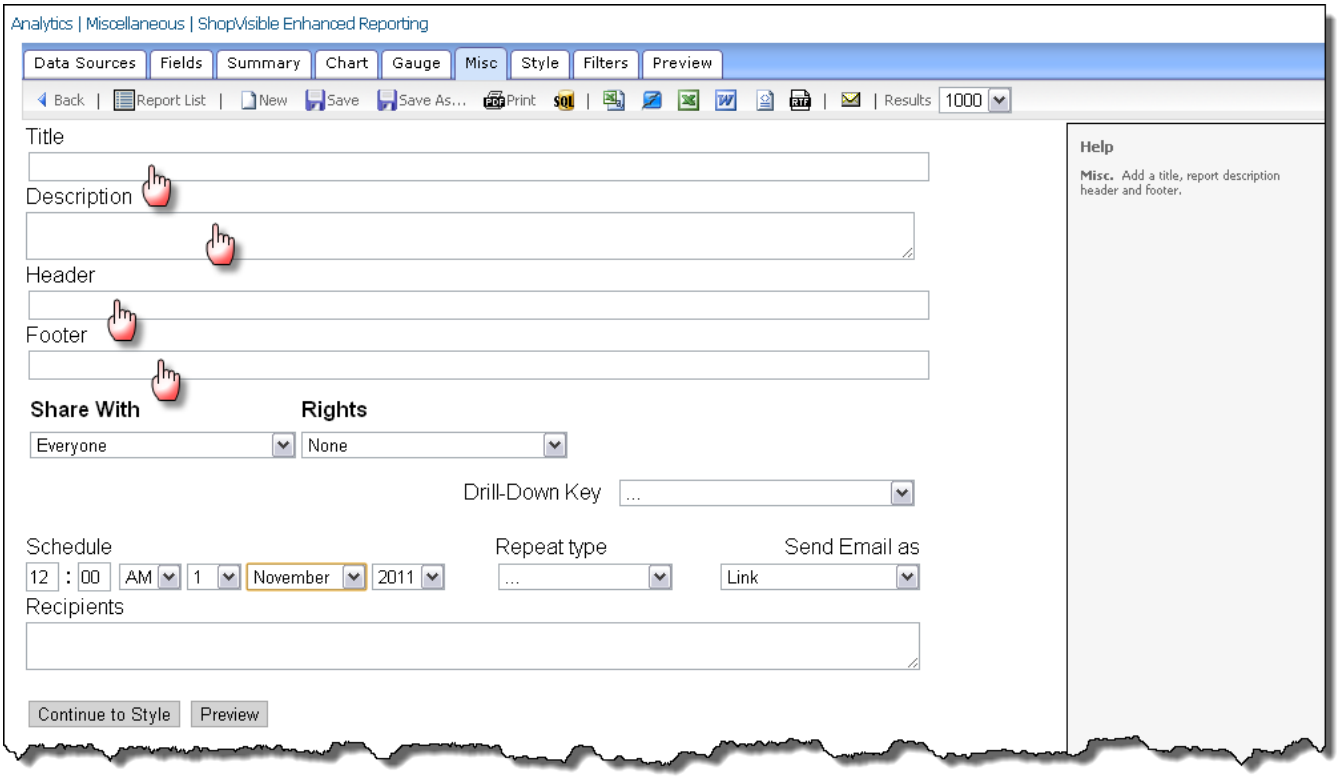
You will add the **Separator** “heard_from” and the **Function** should be set to Group. Place a checkmark in the box next to Show Legend.



Titling the Chart

Adding a Chart Title

To add a title to a chart, click the **Misc.** tab to add the following to the report. Type the **Title** of your report in the field. Type in the **Description.** You can also type in the **Header** and **Footer.**

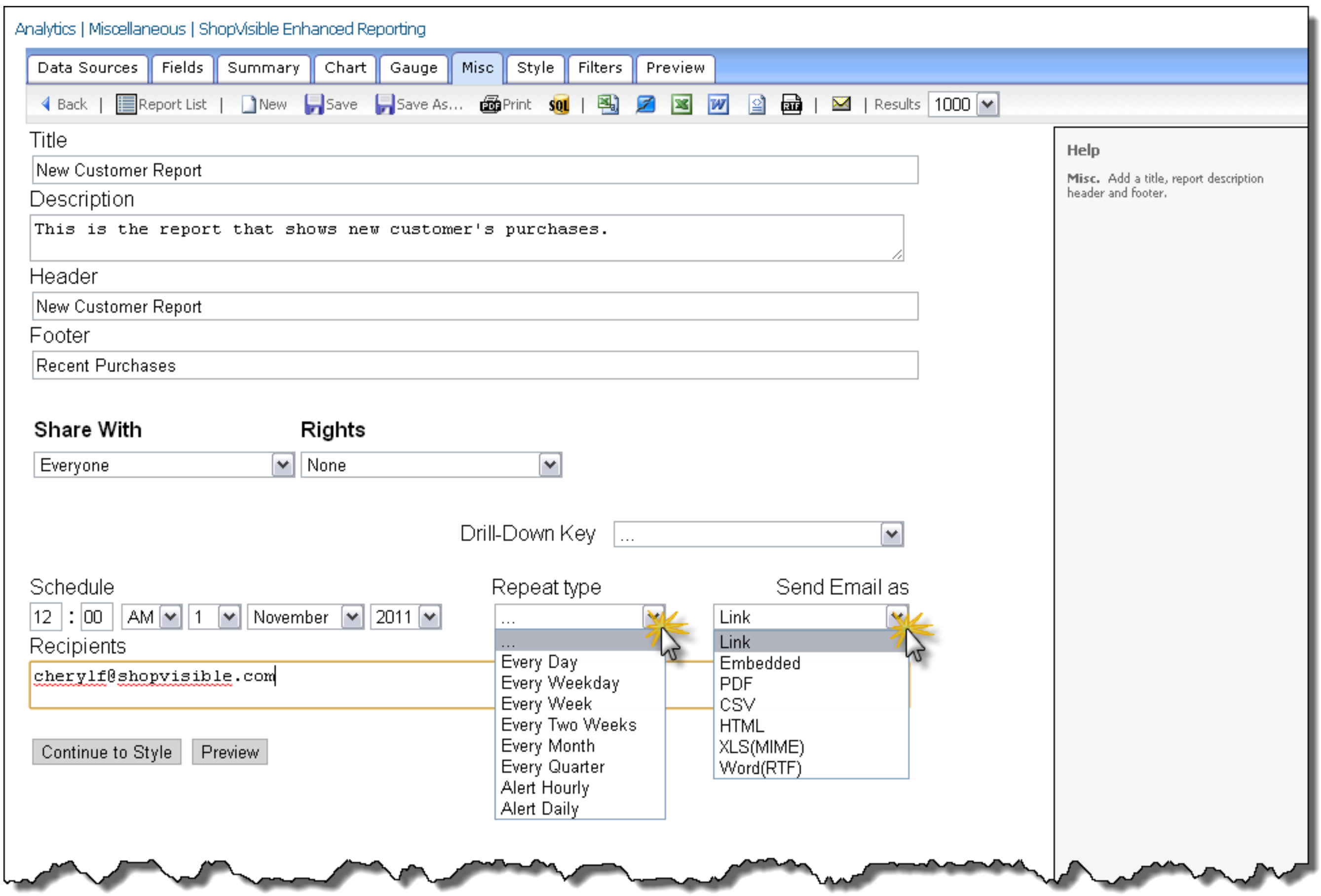


Setting Auto Distribute Options

Specifying an Email Schedule

Complete the bottom section of the **Misc.** tab which includes the following options: **Share With** and **Rights.** You can also schedule for the report to run at set time intervals by choosing the **Repeat Type** from the drop down list.

You can choose to **Send Email as** one of several types of file formats. Separate **Recipients** emails by commas. When you're finished, click on **Preview** to view how the report will look.



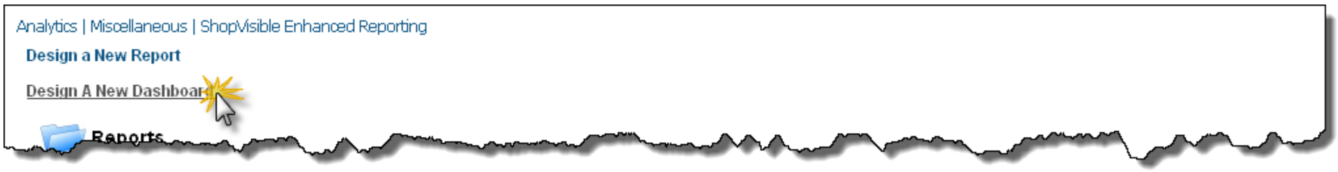
Configuring the Dashboard

Dashboard Overview

You may want to set up a Dashboard in order to see a quick at-a-glance view of some of your reports.

Configuring the Dashboard

Click on **Design a New Dashboard** to access the Dashboard designer.



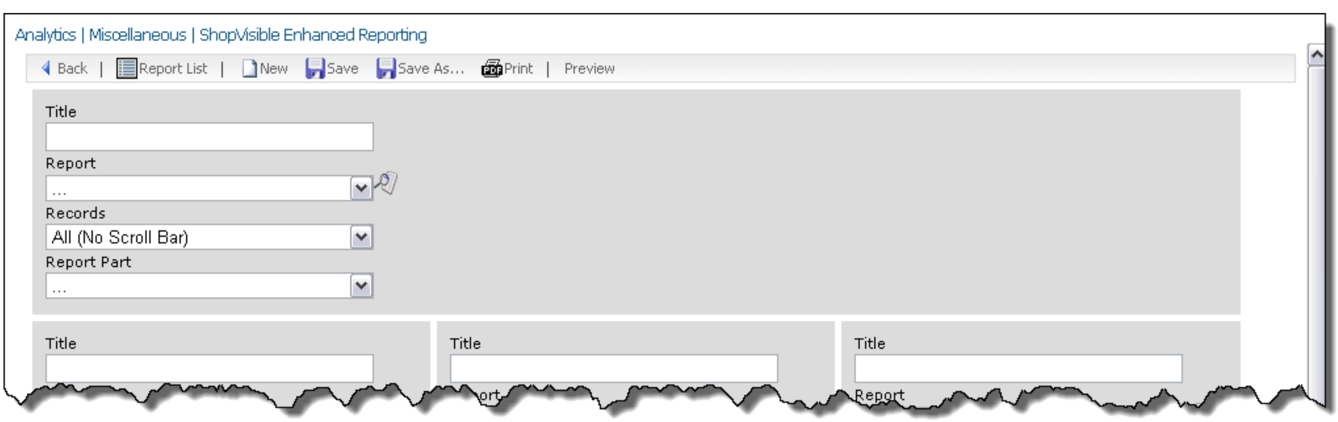
Here is an overview of the report fields available with the Dashboard designer. A total of 11 reports can be configured to display. Two reports are larger and nine reports are smaller.

- **Title**

- **Report –** Use the drop down to select the report that will be included on Dashboard. Any report can be selected that is in the REPORT LIST. The icon next to the REPORT DROP DOWN MENU is used to open the selected report in a separate window for viewing.

- **Records –** This option allows for the selection of the number of records to display for the report. Can be adjusted in increments of 5 and there are settings for All and All (No Scroll Bar).

- **Report Part –** This option allows the user to identify which element of a selected report will display on the dash board. If there is a report that has multiple charts or pivots that need to be displayed, then that report will need to be added multiple times to the dashboard. Afterward, each part of the report can be set separately to display on the dashboard as one entry may be set to display a pivot table where another report setup can be configured to display a chart or trend graph.



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