

# Dashboards & Reports

## KPI tables

### Introduction

#### Introduction

This Quick guide will show you how to Add and edit tables in the dashboard. The data that needs to be filled in is; data, customers, products, data columns and filter. In the end you have setup a table in dashboard.

#### Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

On the last page it is described how to set up the Security to activate, view and edit the described tool.



The guide *may* contain important general notices. These will be marked with an exclamation icon.



Tips and tricks are marked with an Info-icon.



Questions & Answers note relevant to the topic at hand.

### 1 Add element

Open *My dashboard* in the ribbon. A new tab opens. Click *Edit Layout* and choose *Add Element*. A window opens. Click *Tables*.

*This functions the same way in my dashboard as in shared dashboard and any report.*



You should start experiment adding elements in *My dashboard*, and when you feel comfortable you can start setting up the *Shared dashboard*. In this way, the *Shared dashboard* will not be edited by several users.



### 2 Configure the KPI table

The table is set up with customers and products on the left side, and with KPIs in the top above the values.

You can set up your table to different KPIs to customers and/or products. This will be explained later in this guide.

### 3 Placing elements

When you have added elements you need to figure out where to place the element on the dashboard.

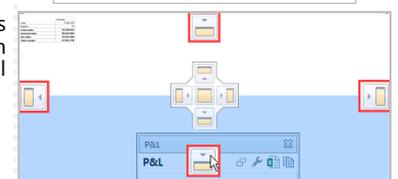
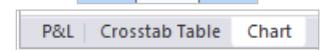
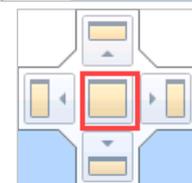
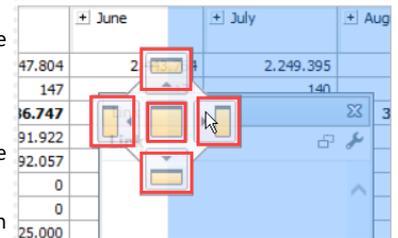
The first element you add will automatically fill the working area.

The second will appear in a pop-up window next to the cursor on the screen.

Click the element to move it. A docking assistant appears on the screen where you can dock the element in the appropriate position. Drag the element to one of the five docking areas (highlighted in red) to dock the position in the middle of the screen. Each docking area indicates the position of the element after it has been docked. The area in blue indicates where the element will be docked.

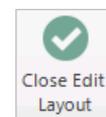
If you place the element in the middle docking area of an existing element (second picture), the window will be placed in another tab than the first one. This creates different tabs in the bottom of the first tab (third picture).

The docking area in the outer edges (fourth picture) of the tab places the element in the outer edges. If you place the element in the bottom of the tab, and then remove the first element, the second element will remain in the bottom of the tab.



### 4 Save layout

Click Close edit layout in the ribbon to save your new layout.



## Quick guide for BMS



You can edit a current chart table by clicking the screw-driver icon in the header of the P&L.

**Configuration**

View
[-] [x]

Header:  Crosstab Table  Show header

**Data**  Fast reporting & Planning level  SKU level

Expanded levels: 0

**Customers**  Customer group 1  Customer group 2  Top level customer name  Banner level customer name  
 Customer group code 1  Customer group code 2  Top level customer code  Banner level customer code

**Products**  Brand Name  Planning mask name  Planning level  
 Brand Code  Planning group name  Planning section name  
 Exclude:  Displays  Components  Loose Products

Data column	Value	Scenario	Version	Stream	Year	Month/Week	Metrics	Target version	Custom column name	Color	Tag
Search...											
Consumer units	Forecast			Total	Current year		Value				

**Filter**  No filter applied  Edit filter

Above you see the window that appears when you add a table. Here is a description of the different marked areas.

1. BMS selects Fast reporting & planning level by default. If you select SKU level you can configure the table to a single product and promotion. However, this functionality takes longer time for BMS to load.
2. If you want to set up your columns with different customers: Here you select the level of the customer hierarchy by name or code you want in your columns.
3. If you want to set up your columns with different products: Here you select the product hierarchy you want. In *Exclude*, you can filter the products. Check if you want to exclude either displays, components and/or loose products.
4. Here you add the columns and configure the values to every column.
  - Value: The value you want the column to show.
  - Scenario: The scenario you want.
  - Version: The version of time you want to show.
  - Stream: The stream you want for every column. E.g. you can select Total, Launch, Returns etc.
  - Year: The year the values for the column should be displayed.
  - Month/Week: The month/week the column should display.
  - Metrics: The calculation method or value of the values in the column.
  - Custom column name: Here you can enter a name for the column for easy reference. This deleted the default name of the column.
  - Color: Here you can select a color for the table.
5. In this section you can add or remove filters to the table.

### Create a simple business tracker

On the following page you see a simple KPI table. It consists of three section:

- The first three columns show the current month unit performance. (The white columns).
- The next three show the trade spent. (The grey columns).
- The last five columns show a full year net sales. (The blue columns).

Top level cus... Δ	Brand name Δ	Actual Total Consumer units Mar 2017	Open Orders Total Consumer units Mar 2017	Actual +Open O... Total Consumer units Mar 2017	Actual (YTD) + ... Total Total promotion...	Actual Total Total promotion...	Actual (YTD) + ... Index Total Act...	Actual Total Net sales YTD (Year-to-d...	Forecast Total Net sales YTG (Year-to-g...	Actual (YTD) + ... Total Net sales	Actual Total Net sales	Actual (YTD) + ... Total Net sales Index Total Act...
Grand Total		0	0	0	220.754	28.847.306	1	0	68.210.514	68.210.514	178.931.553	38
Alld		0	0	0	0	0	0	0	0	0	5.879.706	0
COOP		0	0	0	1.631.816	0	0	0	4.196.409	4.196.409	54.274.235	8
Dansk Supermarked		0	0	0	64.585	20.984.728	0	0	63.337.614	63.337.614	45.782.073	138
Edeka		0	0	0	0	0	0	0	0	0	14.615.813	0
Food compagniet		0	0	0	0	0	0	0	0	0	0	0
INEX		0	0	0	0	0	0	0	0	0	476.777	0
KESKO		0	0	0	0	0	0	0	0	0	585.799	0
KIWI		0	0	0	0	50.000	0	0	0	0	951.946	0
LIDL		0	0	0	0	0	0	0	0	0	493.117	0
Netto		0	0	0	156.169	5.473.886	3	0	676.490	676.490	48.694.421	1
NORGESGRUPPEN		0	0	0	0	0	0	0	0	0	511.748	0
Pers hoved kunde		0	0	0	0	0	0	0	0	0	0	0
Rema		0	0	0	0	706.876	0	0	0	0	5.020.613	0
SuperGros		0	0	0	0	0	0	0	0	0	1.645.705	0

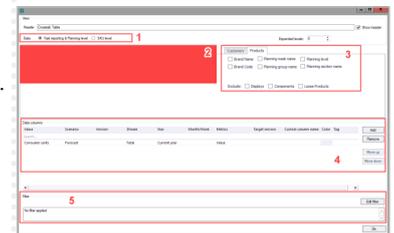
This section is a guide for how to configure a table for different periods. It is meant as inspiration for a specific table, you can set up for:

- Current month
- Year to date
- Year to go
- Total year

### 1 Select customer hierarchy

Select the level of customer hierarchy you want in the table. (Configure number 2).

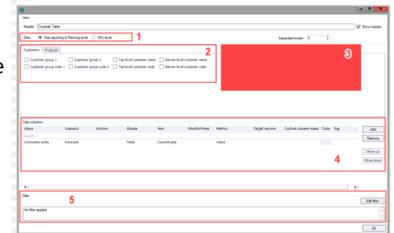
Here Top level customer name is checked.



### 2 Select product hierarchy

Select the level of product hierarchy you want in the table. (Configure number 3).

Here Brand name is checked.



### 3 Add KPIs column(s)

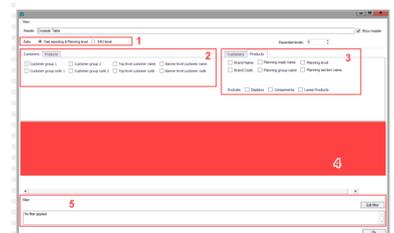
Click Add to the right to add KPIs to the table. You can add as many KPIs you want. (Configure number 4).

Now you can enter information into the different lines of KPI.

Here the following fields are filled out:

- Value
- Scenario
- Stream
- Year
- Month/Week
- Metrics (Index, % calculations etc.)
- Color (for the trade spent and full year net sales)

In the picture below you can see the information we have entered in our example.



The picture below shows how we have entered the columns into the configuration window.

Value	Scenario	Version	Stream	Year	Month/Week	Metrics	Target version	Custom column name	Color	Tag
Consumer units	Actual		Total	Current year	Current month	Value				
Consumer units	Open Orders		Total	Current year	Current month	Value				
Consumer units	Actual + Open Orders		Total	Current year	Current month	% of Total Forecast				
Total promotion allowance	Actual (YTD) + Forecast (YTG)		Total	Current year		Value				
Total promotion allowance	Actual		Total	Last year		Value				
Total promotion allowance	Actual (YTD) + Forecast (YTG)		Total	Current year		Index Total Actual Year - 1				
Net sales	Actual		Total	Current year	YTD (Year-to-date)	Value				
Net sales	Forecast		Total	Current year	YTG (Year-to-go)	Value				
Net sales	Actual (YTD) + Forecast (YTG)		Total	Current year		Value				
Net sales	Actual		Total	Last year		Value				
Net sales	Actual (YTD) + Forecast (YTG)		Total	Current year		Index Total Actual Year - 1				

Create a business tracker by SKU level

Below you see a KPI table based on the same KPI information as the previous KPI table. The difference is an additional promotion ID column. This is because we have added promotion ID.

The KPI table consists of:

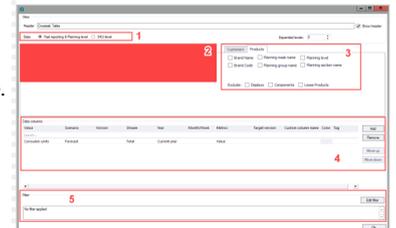
- The first three columns show the current month unit performance (The white columns).
- The next three show the trade spent (The grey columns).
- The last five columns show a full year net sales (The blue columns).

Top level cus...	Brand	Promotion ID	Actual Total Consumer units Mar 2017	Open Orders Total Consumer units Mar 2017	Actual+Open O... Total Consumer units Mar 2017	Actual (YTD) + ... Total Total promotion...	Actual Total Total promotion...	Actual (YTD) + ... Total Total promotion... Index Total Act...	Actual Total Net sales YTD (Year-to-d...	Forecast Total Net sales YTG (Year-to-g...	Actual (YTD) + ... Total Net sales	Actual Total Net sales
Grand Total			0	0	0	220.754	28.847.306	1	0	68.210.514	68.210.514	178.931.353
+ Aldi			0	0	0	0	0	0	0	0	0	5.879.706
- COOP Total			0	0	0,0	0	1.631.816	0	0	4.196.409	4.196.409	54.274.235
COOP			0	0	0	0	1.125.000	0	0	0	0	-30.114
- BODY Total			0	0	0	0	0	0	0	0	0	336.251
BODY			0	0	0	0	0	0	0	0	0	0
			293	0	0	0	0	0	0	0	0	0
			358	0	0	0	375.000	0	0	0	0	-119.396
			359	0	0	0	375.000	0	0	0	0	-114.545
			360	0	0	0	375.000	0	0	0	0	-132.424
- CANDY Total			0	0	0	0	0	0	0	0	0	182.991
CANDY			0	0	0	0	0	0	0	0	0	181.406
			392	0	0	0	0	0	0	0	0	1.575
			473	0	0	0	0	0	0	0	0	0
			474	0	0	0	0	0	0	0	0	0

1 Select customer hierarchy

Select the level of customer hierarchy you want to see in the table. (Configure number 2).

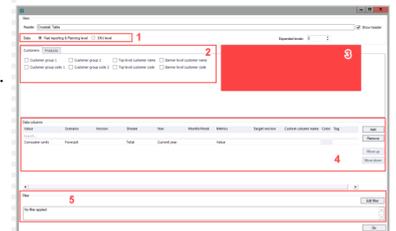
Here Top level customer name is checked.



2 Select product hierarchy

Select the level of product hierarchy you want to see in the table. (Configure number 3).

Here Brand name is checked.

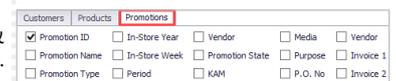


3 Select promotion information

When you have selected SKU level in data instead of Fast reporting & planning level, you can also add promotion data to your table. (Configure number 2).

Select the promotion information you want to see in the table.

Here Promotion ID is checked.

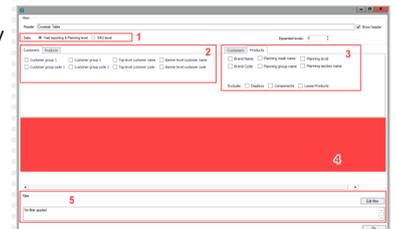


4 Add KPIs

Click Add to the right to add KPIs to the table. You can add as many KPIs you want. (Configure number 4). Now you can enter information into the different lines of KPI.

Here the following fields are filled out:

- Value
- Scenario
- Stream
- Year
- Month/Week
- Metrics
- Color (for some)



## Quick guide for BMS

The picture below shows how we have entered the columns into the configuration window.

Data columns										
Value	Scenario	Version	Stream	Year	Month/Week	Metrics	Target version	Custom column name	Color	Tag
Search...										
Consumer units	Actual		Total	Current year	Current month	Value				
Consumer units	Open Orders		Total	Current year	Current month	Value				
Consumer units	Actual + Open Orders		Total	Current year	Current month	% of Total Forecast				
Total promotion allowance	Actual (YTD) + Forecast (ITG)		Total	Current year		Value				
Total promotion allowance	Actual		Total	Last year		Value				
Total promotion allowance	Actual (YTD) + Forecast (ITG)		Total	Current year		Index Total Actual Year - 1				
Net sales	Actual		Total	Current year	YTD (Year-to-date)	Value				
Net sales	Forecast		Total	Current year	YTG (Year-to-go)	Value				
Net sales	Actual (YTD) + Forecast (ITG)		Total	Current year		Value				
Net sales	Actual		Total	Last year		Value				
Net sales	Actual (YTD) + Forecast (ITG)		Total	Current year		Index Total Actual Year - 1				

### Add filter

#### 1 Edit filter

You can add or remove filters for the table. Click *Edit filter* to add or remove a filter.

Edit filter

#### 2 Select filter

Select the customer or product hierarchy you want to filter in your table in the menu to the left. Check the customers/products you want to hide. Click Ok to apply filter.

	Value
<input type="checkbox"/>	COOP
<input checked="" type="checkbox"/>	Dansk Supermarked
<input type="checkbox"/>	Edeka
<input type="checkbox"/>	Food compagniet
<input checked="" type="checkbox"/>	Helsam

### Other options

#### Remove KPIs

To remove a KPI, click *Remove* in the right side of the configuration window.

Remove

Security - User Roles

For a user to view and edit the Reports in the system, access needs to be granted from Security settings by a super-user/admin.

**Security**

From "File" select "Security" and the window with all the users in the system and the roles assigned to each one will open. Select a role to open the corresponding settings.



**Allow View & Edit Reports**

Check mark the boxes to allow the role to view and edit:

**Standard reports** - mark "System" to allow to work with standard BMS reports.

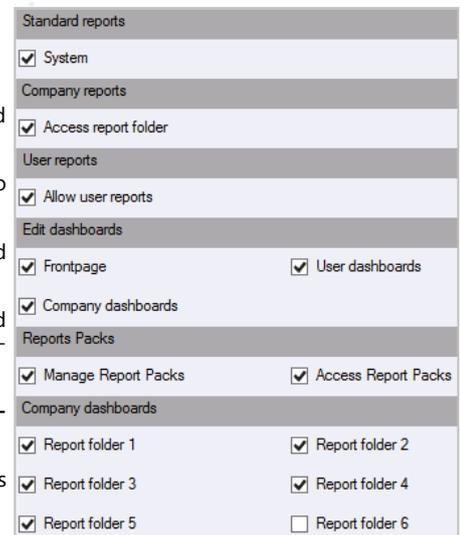
**Company reports** - mark "Access report folder" to allow access to the corresponding folder with company specific reports.

**User reports** - mark "Allow user reports" to allow the role to build his/her private reports.

**Edit dashboard** - mark "Frontpage", "User dashboards" and "Company dashboards" to allow access to the corresponding dashboards.

**Report Packs** - mark "Manage Report Packs" and " Access Reports Packs" to allow view and edit of the report packs.

**Company dashboards** - mark the "Report folder X" to allow access to the corresponding report folders.



## Dashboards & Reports: KPI tables

### Questions & Answers



*Can I combine all sorts of data?*

Yes.



*Can I export the KPI table to Excel?*

Yes, click the Excel icon in the upper right corner of the element window.



*My KPI table is slow. What can I do?*

It can be two things. Either you have selected SKU level in the configuration window, or you have too many columns. You can select to save these options in a report instead of having them in a dashboard.