SPS COMMERCE

SPS Commerce

Dashboards & Alerts User Guide

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Introduction

This is a user guide designed to provide guidance while becoming familiar with the Enterprise Dashboards and reading the reports generated by the Enterprise reporting tool. This guide can be referenced at any time for many frequently asked questions.

We recommend that a copy be kept available during any live training sessions attended so that notes can be made where appropriate.

Additional Resources

In addition to this guide, SPS Commerce offers many other additional training resources.

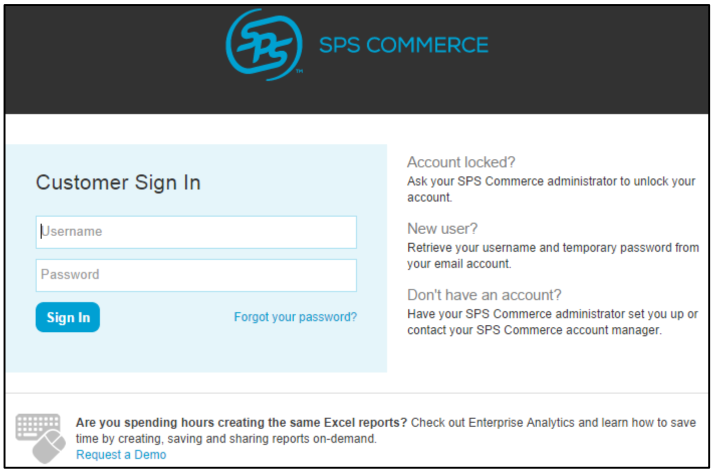
- Regularly scheduled live webinars with members of our training team
    - The calendar can be accessed at Training tab > Attend a Webinar
- Videos
- Additional written guides
- Custom training sessions for your company

Please contact the training team at POSTraining@spscommerce.com or visit http://analytics.spscommerce.com/training if you need further assistance.

Logging In

Once your account is set up, you will receive an email confirming this and including your username and introductory password.

1. Navigate to https://analytics.spsocommerce.com/

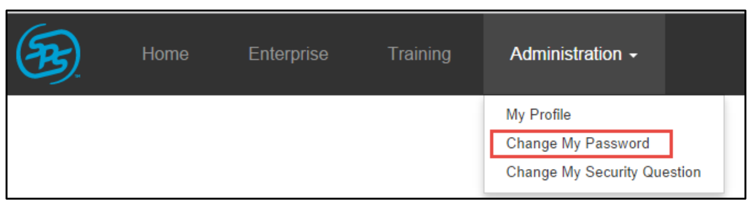


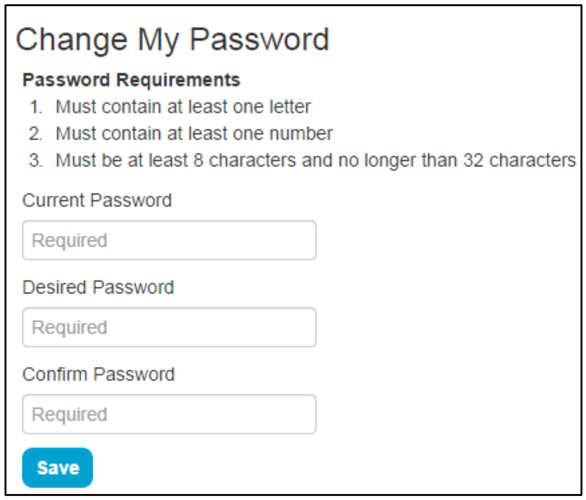
2. Enter your username.
3. Enter your password.
4. Click **Sign In**.

Changing your password

Once logged in, you'll be brought to the homepage of the portal. In the navigation bar, there are several tabs available. Passwords can be changed through the Administration tab.

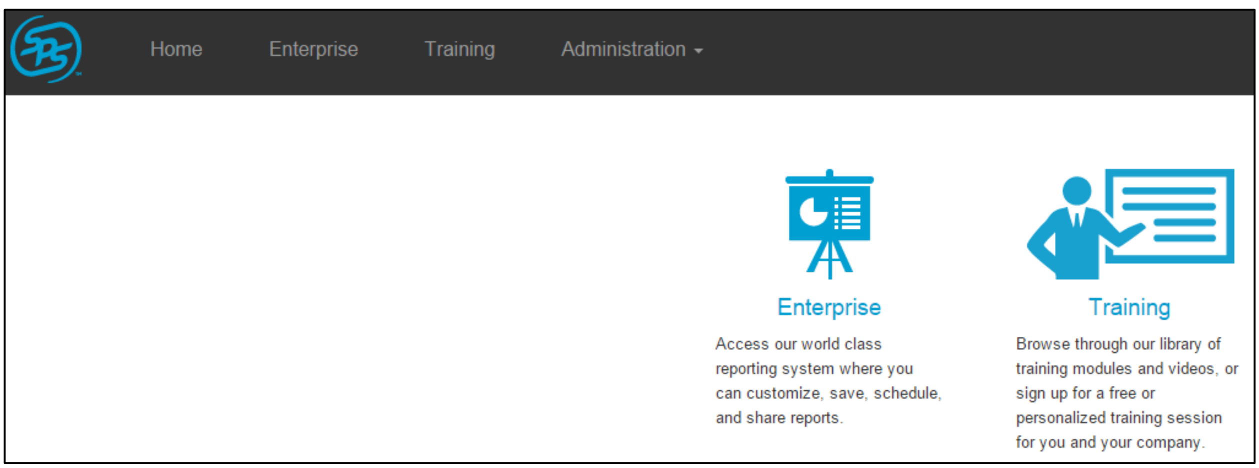
1. Click **Administration**
2. Select **Change My Password**.
3. Enter in your **Current Password**.
4. Enter in your **Desired Password**.
5. Confirm your password and click **Save**.





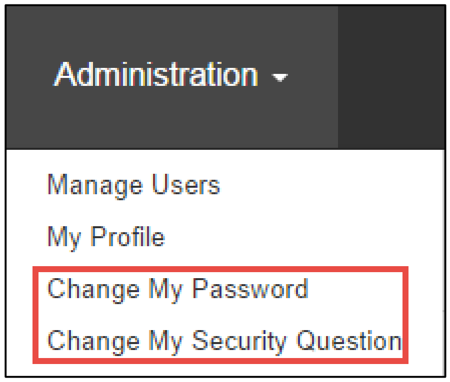
The Portal Homepage

Logging in opens the homepage of the Portal. You are presented with a series of icons centered in the page as well as a black navigation bar running across the top. The navigation bar includes tabs with the same names as those centered below. From the navigation bar across the top, it's possible to access any of the same areas within the portal as the icons. The difference is that the icons open the new area within the same tab in the browser while using the navigation bar opens that area in a new tab within the browser.



Administration

The administration tab is the area where security preferences can be updated. Passwords and security questions can be changed by clicking on **Administration** and choosing either **Change My Password** or **Change My Security Question**.



My Reports

My Reports in the portal is an area that will only be available if there are Shared View reports. This area allows for access to several pre-designed Excel pivot table report views and dashboards. Users will only see the reports and dashboards to which they have been given access by their administrator. Therefore, it's possible that different users have different shortcuts within this area.

Dashboards

The Dashboards available through the portal are the Shared View dashboards. There are six in total that provide a snapshot of information. The time frame can be adjusted to provide week to date, month to date, season to date or year to date information based on the retailer's calendar. These dashboard reports can also be exported into pdf format to be printed or emailed.

Total Retail Sales: Provides a glimpse into the total sales volume TY to LY, accounting for store closings.

Key Performance Indicators: Information for several key metrics are provided with a comparison of TY to LY and the variance calculated.

Class % to Total Vendor *(Retail Sales $)*: Breaks down the total vendor sales by merchandise class.

Retail Sales by Week: A week by week comparison of TY sales to LY sales.

Top 10 Styles: A list of the top 10 styles as determined by sales volume for the chosen time period with other key metrics provided.

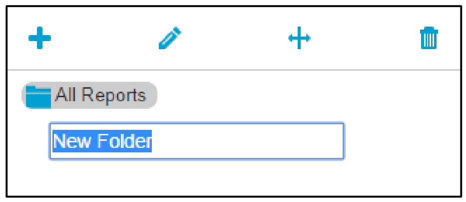
Top 10 Stores: A list of the top 10 stores as determined by sales volume for the chosen time period with other key metrics provided.

Creating a Folder Structure

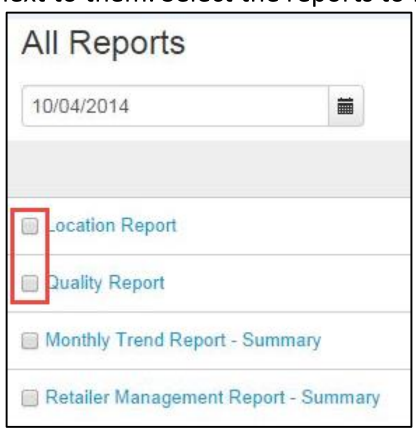
Creating a folder structure assists in organizing information and reports so that whatever is needed is easy to find. Enterprise Analytics offers this functionality within the My Reports area. Before reports can be organized, a folder structure must be in place. The icons in the tool bar across the top of the left hand navigation include the commands for creating, moving, editing, and deleting a folder.

Creating a New Folder

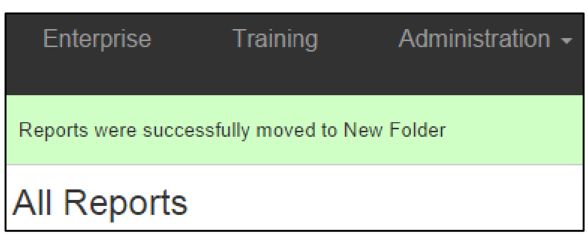
1. Click the + sign.
2. In the blue box that appears, type the name of the folder and tap enter.



3. The reports have check boxes next to them. Select the reports to be moved.



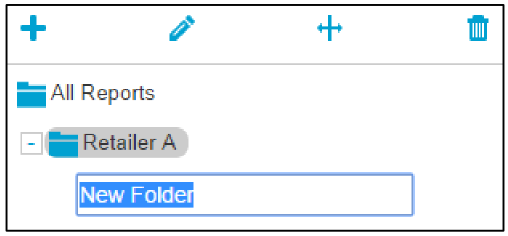
4. Click the double sided arrow icon to open the Move Reports dialogue box.
5. From the drop down, select the folder to which the report is being moved to. Click Move.
6. A green success notification appears across the top of the All Reports section that identifies the folder the reports were moved to.



Creating a Folder within a Folder

1. Select the main folder the new one will be under.

2. Select the + sign.



3. In the new box that appears, type the name of the new folder and click enter.

It is possible to create as many folders and levels of folders as desired.

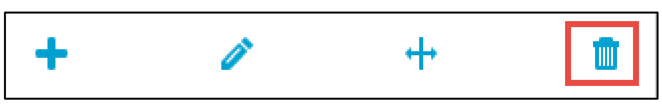
Editing a Folder Name

Once a folder structure is created, it may need to be altered as the needs of the user change over time. Edits can be done by clicking the pencil icon in the toolbar.

1. Select the folder to be edited.
2. Click the pencil icon in the toolbar.
3. The blue box seen when creating the folder appears and allows for the name to be edited.

Deleting a Folder

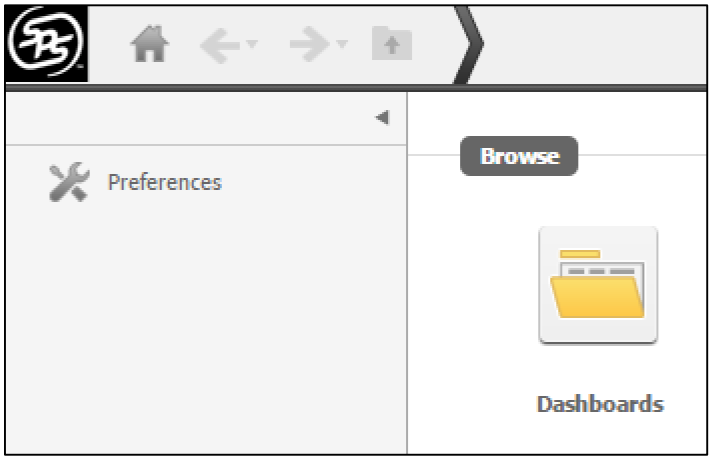
Occasionally, there is a need to delete a folder. The command for this is the trash can, also located in the tool bar. All reports sorted into the folder are returned to the general All Reports area.



1. Select the folder to be deleted.
2. Navigate up to the toolbar and click the trash can.
3. The folder is now deleted.

Enterprise Home Page

Once the Enterprise area is accessed, either through the navigation bar or the icon on the Portal homepage, only the Dashboards icon will be available.



- **Dashboards**: Provides a snapshot of the business as a graph.
- **Preferences**: Sets a variety of options such as report display, printing and exporting properties.

Enterprise Dashboards

The dashboards are available to all Enterprise users and are designed to provide a snapshot of the business. There are four dashboards available.

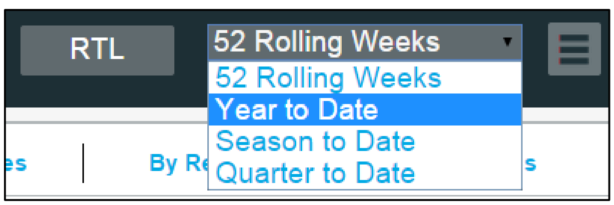
Business Overview: Monitors business performance through components such as Sales Trends, Category, Retailer and State performance.

Retailer Overview: Tracks key performance indicators year over year for sales, inventory, margin and more. Also, weekly sales trends are monitored and top performing stores are identified.

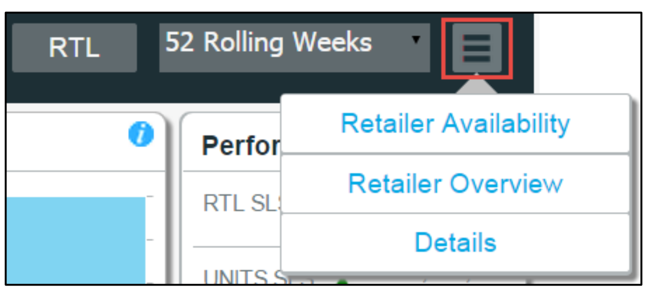
Business Details: Performs thorough analysis by Category, Retailer, State and Week. Also allows for switching between time periods and drilling down across values to a more grid level view.

Retailer Availability: Identifies which Retailers have submitted data for each week and allows users to determine the amount of historical data available per retailer.

By default, all dashboards are set to reflect data from a 52 Rolling Week time period. It's possible to adjust the time frame of the dashboards by clicking the drop down in the upper right hand corner. It offers, as selections, Year to Date, Season to Date, and Quarter to Date. Click one to update the information within the dashboards reflective of the new timeframe.

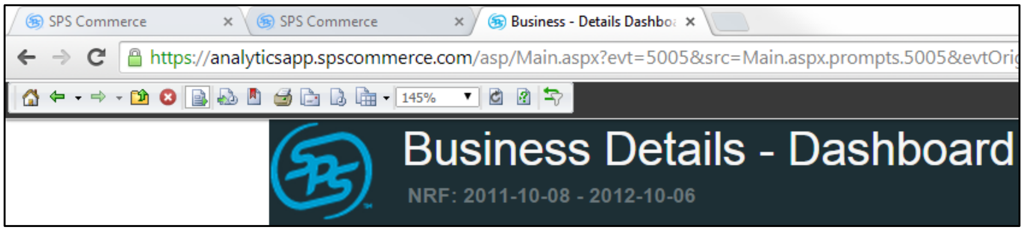


It's possible to jump between dashboards by clicking the icon with three lines in the upper right hand corner. It will generate a menu with the three other dashboards listed. Click one to jump to it.



Subscribing to Dashboards

Once you are in the dashboard, there is a tool bar in the upper left hand corner that offers access to many of the commands available and navigation back into Enterprise.



Note: Mousing over each command will provide the name of that command.

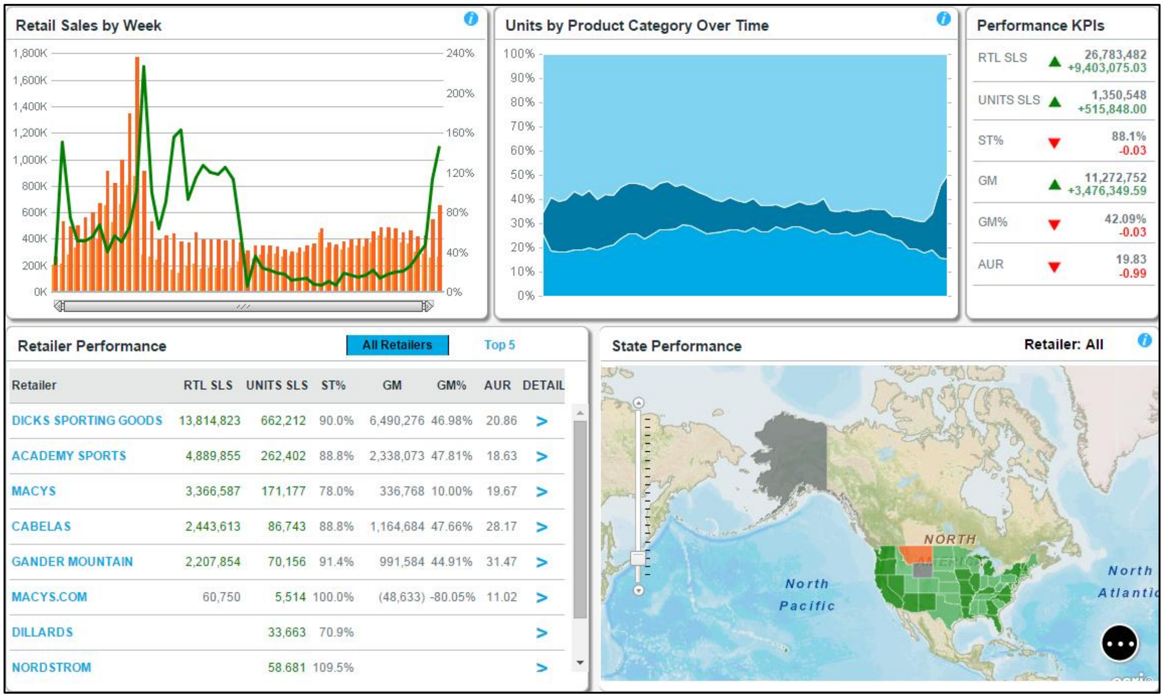
Setting Up an Emailed Dashboard Subscription

1. From the toolbar, click on **Send Now**…
2. This opens the **Send Now** Dialogue box.
3. Click **To:** to select recipients receiving the emailed Dashboards.
4. From the dropdown, select the delivery format.
5. Create an email subject.
6. *Optional* Create an email message.
7. Click **OK**.

You will then be returned to the dashboard.

Business Overview Dashboard

The **Business Overview** Dashboard provides insights into the overall health and well-being of the business. It includes all of the retailer data available to produce totals utilized within the Dashboard.



Note: When there is an “i” icon in the upper right hand corner of a graph, there is a key or legend available. Click the icon to open the key.

Retails Sales by Week: Includes a bar graph that compares TY to LY, with a variance line plotted over it.

Units by Product Category Over Time: Breaks the TY dollar amount down by category and displays it so that sales trends within the categories can be tracked.

Performance KPIs: The six top metrics displayed with an indication of whether or not they are up or down compared to the prior year.

Retailer Performance: The same six metrics from the Performance KPIs are now broken down by individual Retailer.

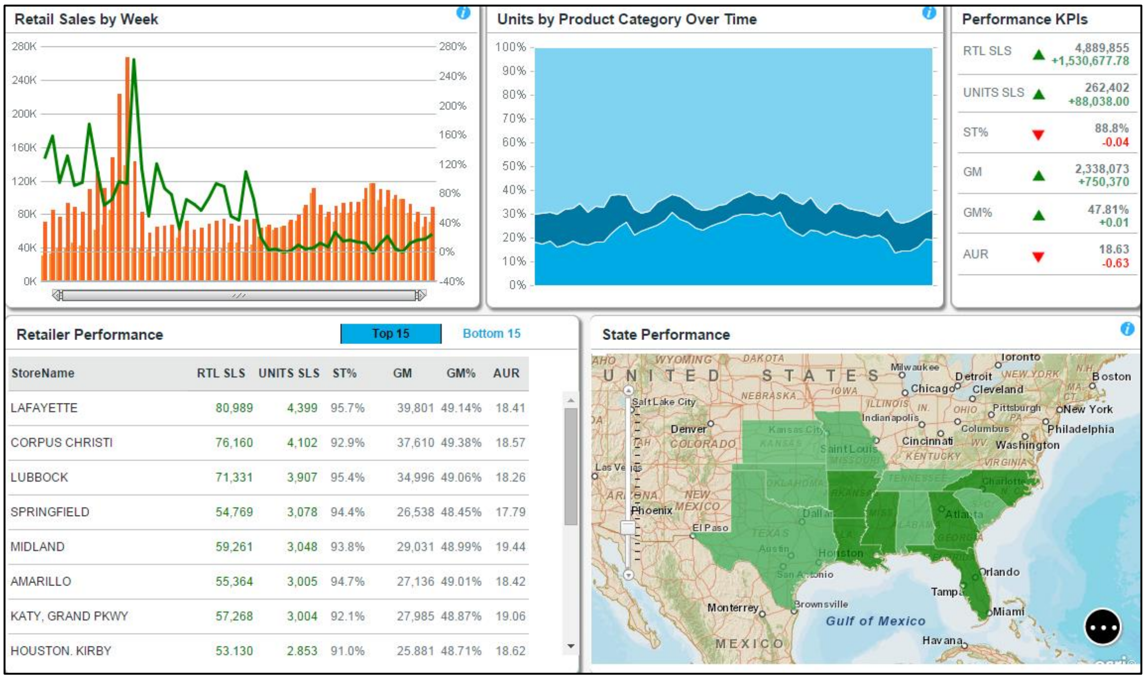
State Performance: Provides an overview of the business on a state by state comparison. Click a state to see the TY/LY comparison for that specific state.

To update the state performance map for a specific retailer, click the name of the retailer in the **Retailer Performance** graph.

To navigate from this page to the Retailer Overview Dashboard, click the arrow under the Details column, but in the row of the retailer you would like to drill down into.

Retailer Overview Dashboard

The **Retailer Overview Dashboard** tracks key performance indicators year over year for sales, inventory, gross margin and more. Also, weekly sales trends are monitored and top performing stores are identified.



Retails Sales by Week: Includes a bar graph that compares TY to LY, with a variance line plotted over it that is specific to the retailer chosen.

Units by Product Category Over Time: Breaks the TY dollar amount of the business done with that specific retailer down by category and displays it so that sales trends within the categories can be tracked.

Performance KPIs: The six top metrics displayed with an indication of whether or not they are up or down compared to the prior year for the retailer chosen.

Retailer Performance: The same six metrics from the Performance KPIs are now broken down by individual store. It defaults to the top 15 stores, but can be updated to reflect the bottom performing 15 stores.

State Performance: Provides an overview of the business for that retailer on a state by state comparison. Click a state to see the TY/LY comparison for that specific state.

Business Details Dashboard

The **Business Details Dashboard** performs analysis by Week, Category, Retailer and State utilizing the same six key metrics. This dashboard also allows for switching between time periods and drilling down across values to a more grid level view.

By Week

By Week | By Categories | By Retailers | By States

Week		UNITS SLS	LY	VAR		RTL SLS	LY	VAR	
2011-10-08	2011 35	14,600	8,491	71.9%	▲	264,919	208,218	27.2%	▲
2011-10-15	2011 36	24,157	8,581	181.5%	▲	533,310	212,166	151.4%	▲
2011-10-22	2011 37	22,859	10,373	120.4%	▲	496,351	283,911	74.8%	▲
2011-10-29	2011 38	22,855	11,705	95.3%	▲	504,943	332,352	51.9%	▲
2011-11-05	2011 39	24,168	13,104	84.4%	▲	562,837	372,012	51.3%	▲
2011-11-12	2011 40	26,341	13,784	91.1%	▲	602,593	387,904	55.3%	▲
2011-11-19	2011 41	28,336	13,897	103.9%	▲	667,430	398,318	67.6%	▲
2011-11-26	2011 42	36,501	21,700	68.2%	▲	915,156	651,327	40.5%	▲
2011-12-03	2011 43	34,534	18,231	89.4%	▲	818,402	523,366	56.4%	▲
2011-12-10	2011 44	43,662	23,837	83.2%	▲	999,292	664,099	50.5%	▲
2011-12-17	2011 45	58,769	30,034	95.7%	▲	1,348,676	810,550	66.4%	▲
2011-12-24	2011 46	79,631	34,408	131.4%	▲	1,772,682	877,304	102.1%	▲
2011-12-31	2011 47	40,926	10,826	278.0%	▲	910,252	278,341	227.0%	▲
2012-01-07	2011 48	24,619	10,797	128.0%	▲	536,548	267,012	100.9%	▲
2012-01-14	2011 49	19,459	9,700	100.6%	▲	393,496	239,965	64.0%	▲
2012-01-21	2011 50	21,520	9,364	129.8%	▲	425,445	222,208	91.5%	▲

Click the blue heading of the category to be viewed. This updates the dashboard to reflect the data for that heading. It will always be displayed in a week by week grid.

Drilling Down

Several of the headings within the Business Details Dashboard allow for the ability to drill down. These include the Categories, Retailers, and States. If the term listed in the column to the far left is blue, it can be clicked to drill down further.

By Category

Category	Rank
Footwear	1
Accessories	2
Apparel	3
Total	1

This launches the report building tool. Click **Run Report**. This generates the new report with the next level data.

Retailer Availability Dashboard

The **Retailer Availability Dashboard** indicates what data is provided by the retailer as well as whether or not the data from has been received.

Retailer	Stores	Sales Retail	Owned Retail	Adjusted Cost	Acquired Cost	Units	2012-09-15	2012-09-22	2012-09-29	2012-10-06
ACADEMY SPORTS	185	✔	✔	✔	✔	✔	●	●	●	●
CABELAS	55	✔	-	✔	✔	✔	●	●	●	●
DICKS SPORTING GOODS	586	✔	✔	✔	-	✔	●	●	●	●
DILLARDS	289	-	-	✔	-	✔	●	●	●	●
GANDER MOUNTAIN	158	✔	-	✔	-	✔	●	●	●	●
MACYS	617	✔	-	✔	-	✔	●	●	●	●
MACYS.COM	5	✔	-	✔	-	✔	●	●	●	●
NORDSTROM	244	-	-	✔	-	✔	●	●	●	●

If there is a green check in the column for that retailer, it's data that is provided. If there is a green circle, we have received it. If there is an orange circle, it hasn't yet come in.

Receiving System Generated Email

A Dashboard and Alerts user may receive either an exported report attached to an email and/or an email alert with an attached exported report.

Emailed reports are sent on a weekly basis and are fully automated. Alerts are only generated when the data calculations meet a specified threshold established by the report builder. Additionally, the emails will only be received if the report builder designates the Dashboard and Alerts user as a recipient. The Dashboard and Alerts user does not have the ability to adjust the settings of the alert or the details of the report, nor the ability to adjust the subscription settings either.

Modifying Preferences

Preferences can be set so as to impact many aspects of the Enterprise application. **Preferences** is located in the left hand navigation on the **Home** page. There are **General** preferences that cover things like the language and time zone, fonts, saving and copying options. **Grid Display** impacts things like the maximum rows and columns included in the report upon execution as well as the default settings for pivot and sort buttons, as well as the page by axis. **Export Reports** sets preferences for file types, inclusion of the page by axis when present, and even which excel version. At any time, the default settings can be reinstated by clicking **Load Default Values**.