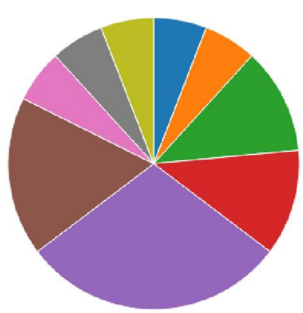
New Feature Description

Analytic Reporting Tool PRO

Contents



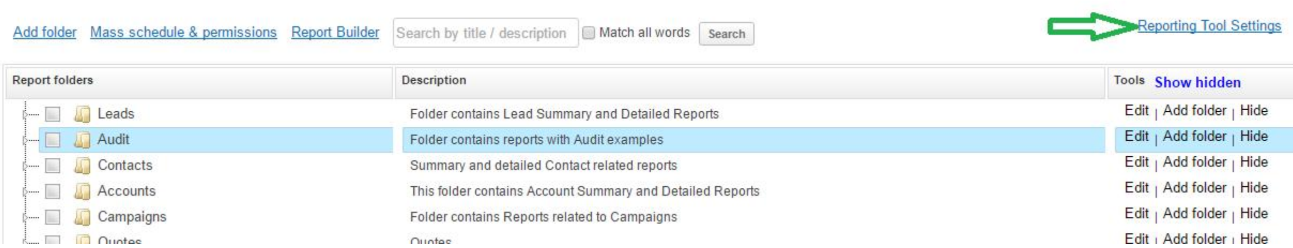
Last updated: October 22, 2016

ADDING YOUR OWN EXCEL TEMPLATES

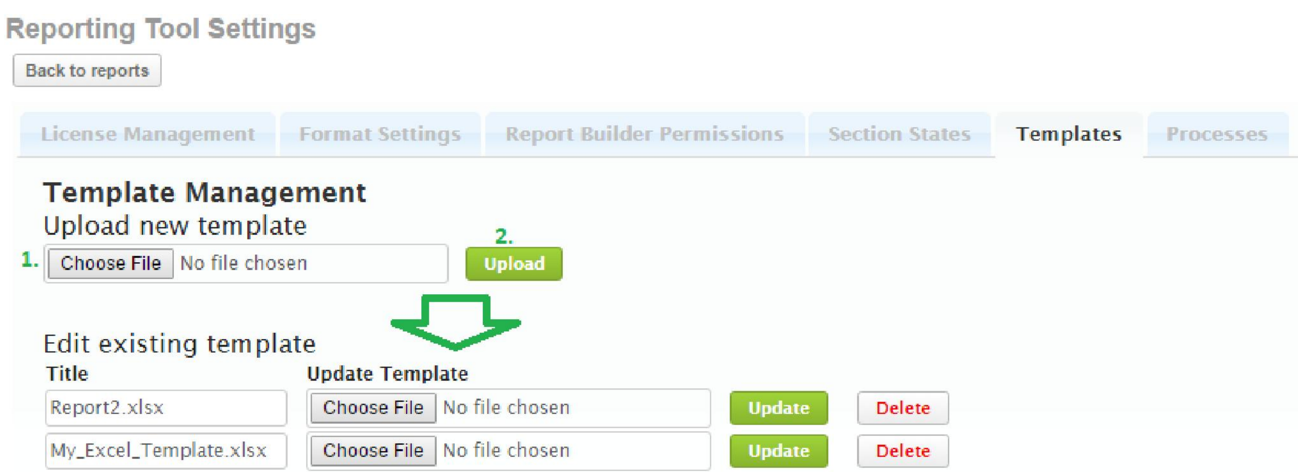
You can format your own Excel templates in order to have the Analytic Reporting Tool output the report data in your formatted Excel template.

In order to do this, start by creating an Excel file that you will use as a template. In your Excel template you can add logos, colors, define the text format, formulas and even Excel charts.

When the Excel file is ready, an admin user can upload it under Analytic Reporting Tool Settings-> 'Templates' tab:

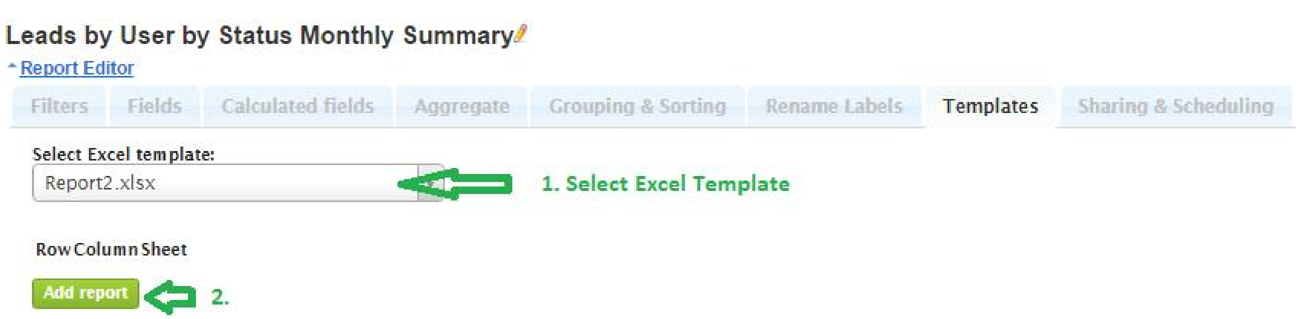


The uploaded templates can later be changed, via the 'Update' button or removed via the 'Delete' button.

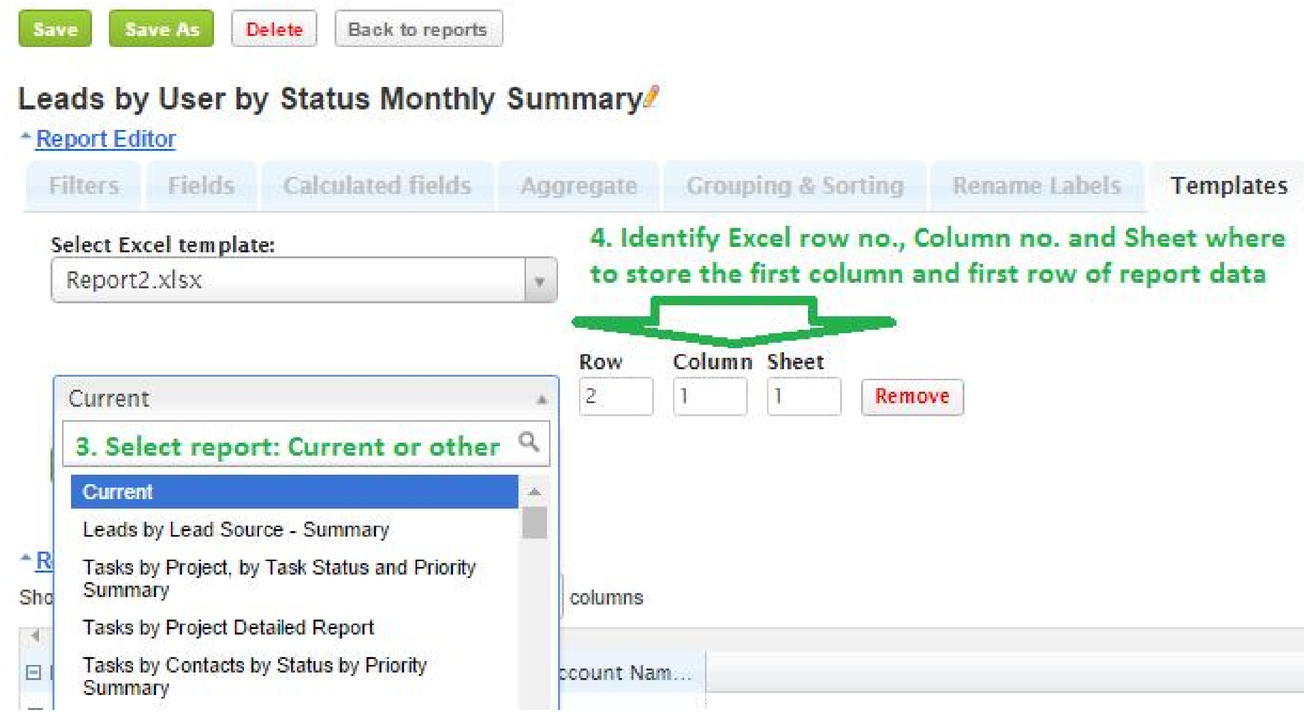


When this is done, you can open a report, which you want to relate to the template.

1. Under the 'Templates' tab you can select one of the uploaded Excel file templates.
2. Clicking 'Add report' will add a new row with settings for report data merging with the identified Excel template

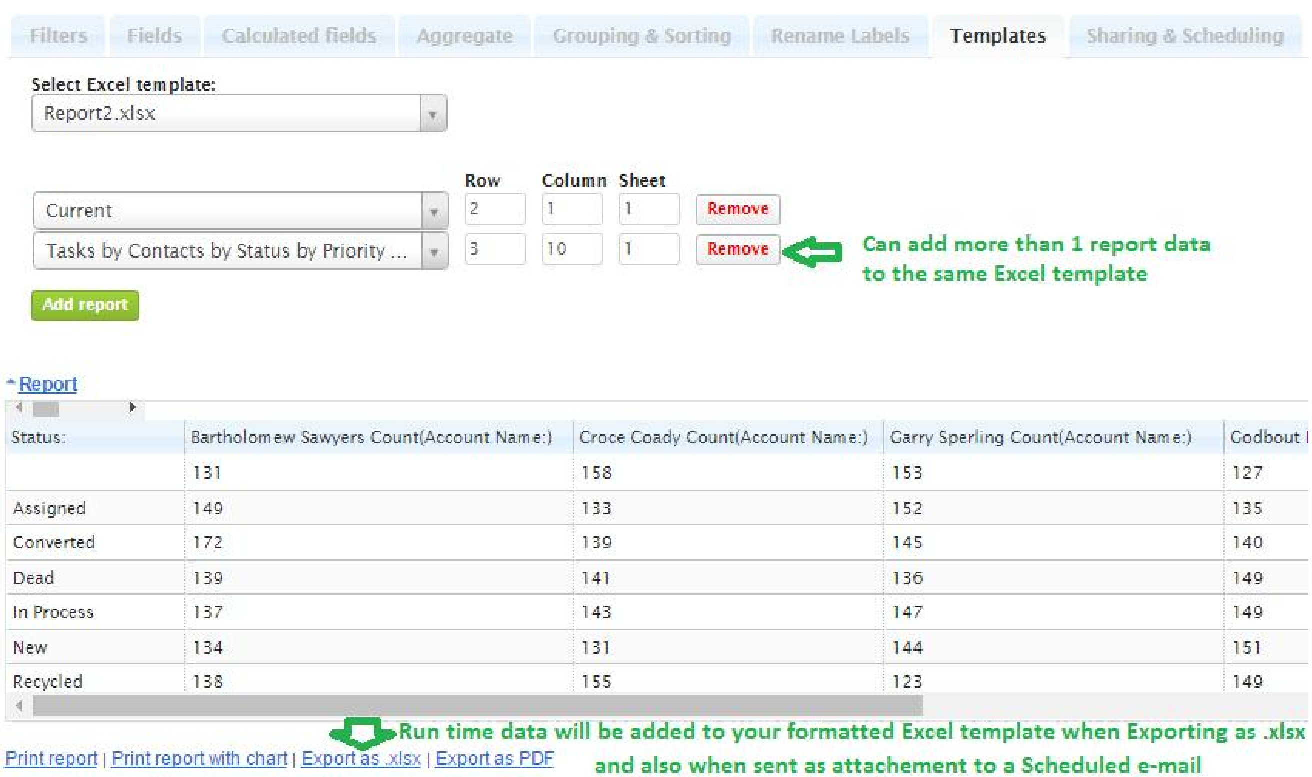


3. In the drop-down menu you can select which report will be merged with a template. Select 'Current' if you want to merge with the current report. You can also select any other report by its title.



4. You can identify where the very first row and column with the report data will be stored in the template.
5. You can add more than one report to the same Excel template. Click 'Add report' to add one more report to this template.

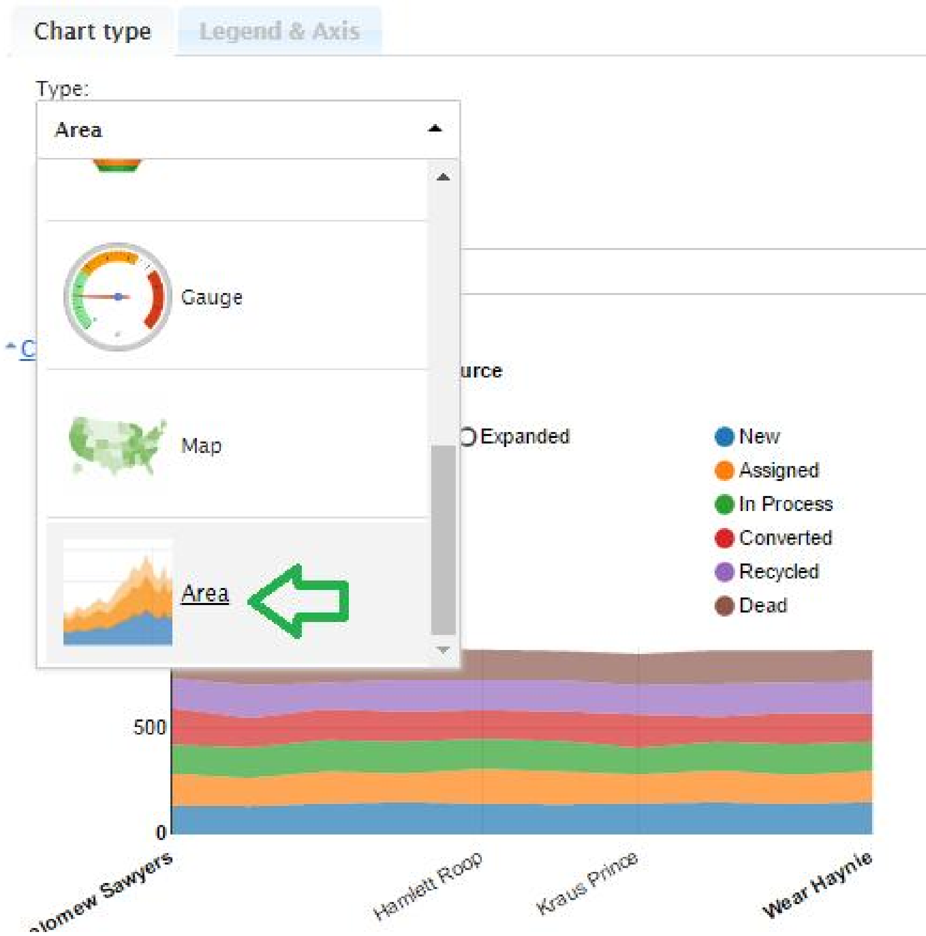
Important! *Make sure that multiple reports don't overlap with each other! To do this you can identify a different row, column and sheet.*



The report will be prepared in the new Excel template each time you click "Export as .xlsx" or when scheduled via e-mail as an Excel attachment.

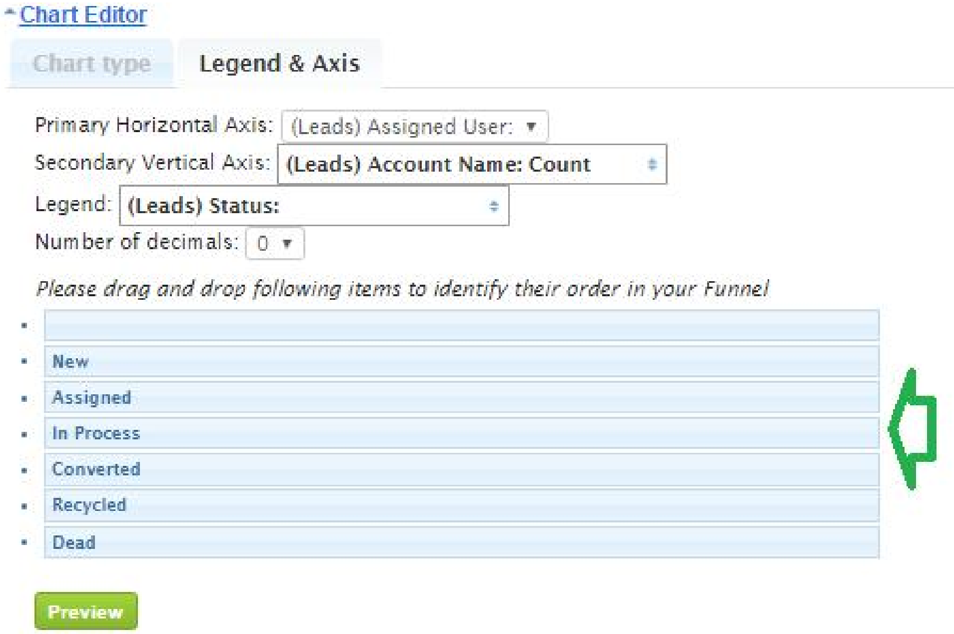
NEW CHART TYPE: AREA CHART

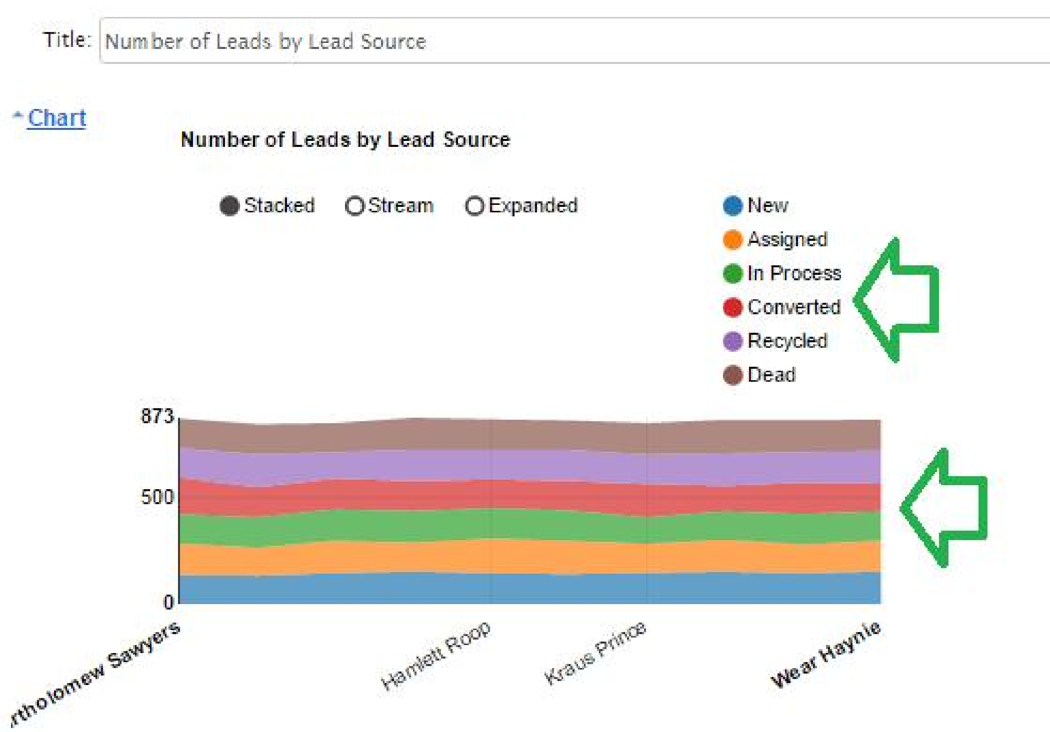
In order to select the new chart type “Area Chart”, please select the ‘Area’ Chart type under Chart Settings:



Under Legend & Axis you can now identify, what should be displayed in your Area Chart. The chart is using previously Saved Report settings (identified Aggregates under “Aggregates” tab and Groups under “Grouping and Sorting” tab).

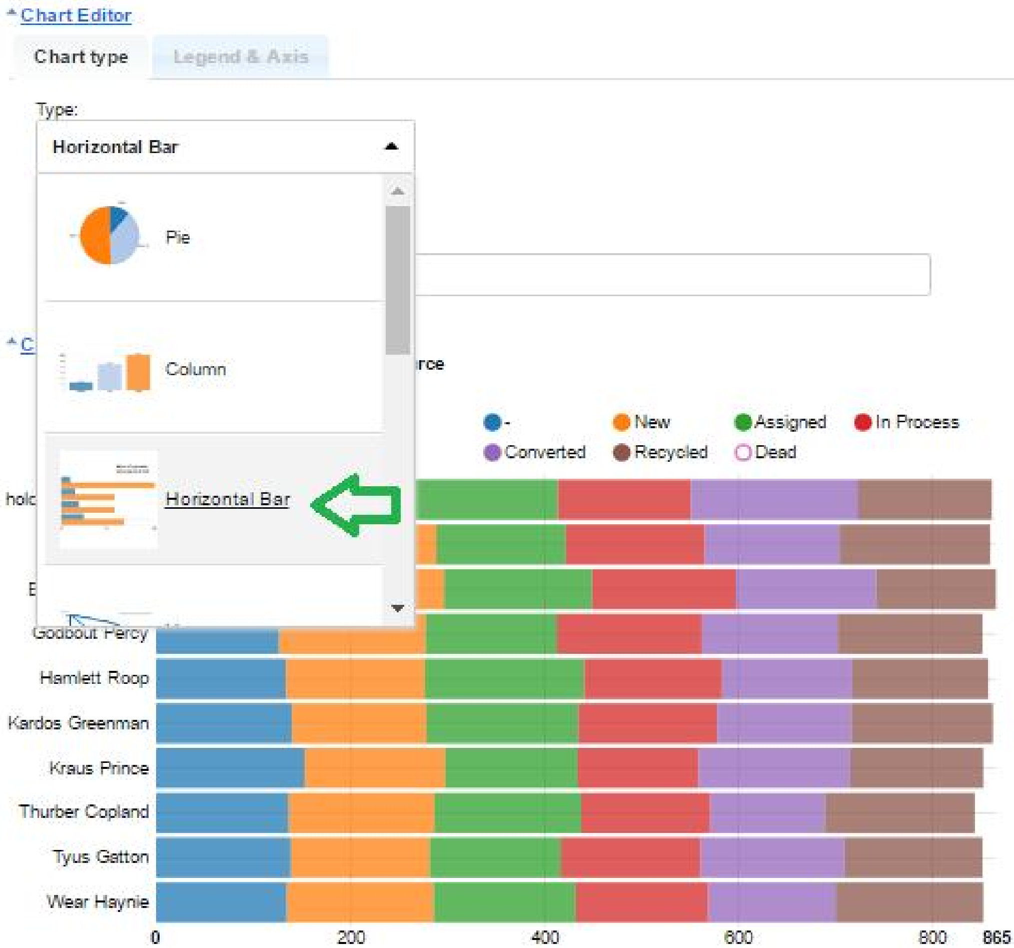
When choosing ‘Stacked’ and the selected ‘Legend’ source is a picklist type field, e.g. ‘Status’, you will be able to drag&drop the order of the values to be displayed in your Area chart.





HORIZONTAL BAR CHART

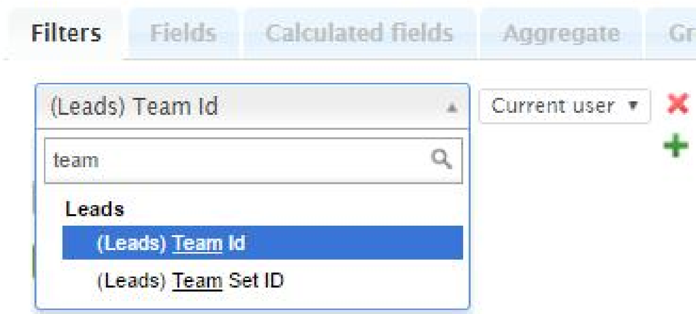
If you have selected the „Horizontal Bar" chart type, under „Legend and Axis" you can identify the group from your Report which should be represented by the Primary Horizontal Axis. The summary, count or average should be selected for the Secondary Vertical Axis. You can select more than one of the Summary Aggregates under Secondary Vertical Axis, in this case the „Legend" should be same as selected under Secondary Vertical Axis. Otherwise it can be any of the Groups from your report.



For Horizontal Bar chart you can select „Grouped” or „Stacked” data representation. Hovering or clicking on any chart area will display the data represented by this area. Clicking the circles next to the Chart Legend will hide/show the corresponding data in the chart.
It is important to Save the report if you want your new chart settings to be saved.

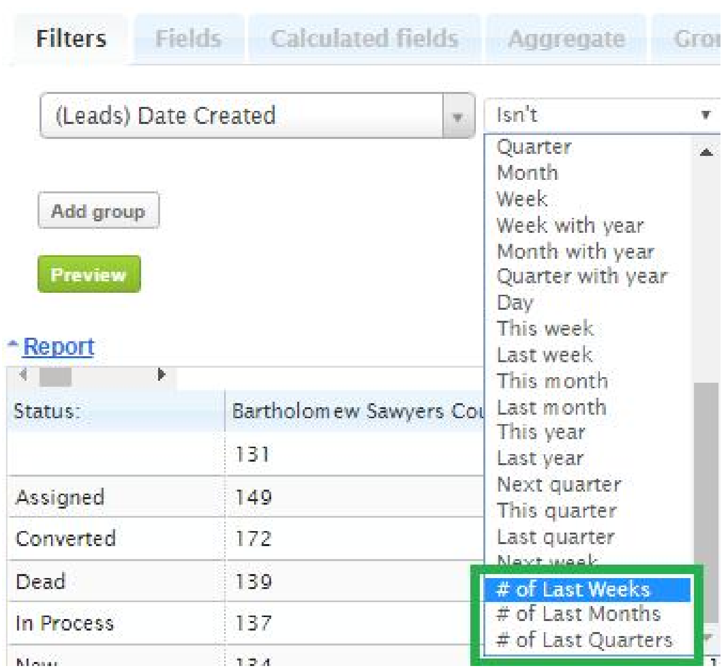
ADDITIONAL FILTERS: TEAM, # OF PASSED WEEKS, MONTHS, QUARTERS

It is possible to filter by the assigned main team or all teams assigned to the object. ‘Team Id’ will identify only the main assigned team. ‘Team Set ID’ identifies all assigned teams, not only the main team. If you need a User to see only their assigned team data, please use ‘Current user’ criteria as you can see below.



‘# of Last weeks’ will return data within only fully ended weeks as of the selected date. For example, if you decide to filter the three last weeks, the system will filter three passed weeks starting from Monday to Sunday and omit the current week. If the current week is also necessary, you can add one more filter with the ‘or’ connector and add ‘This week’ in the additional filter.

Analogically filters of ‘# of Last Months’ and ‘# of Last Quarters’ will work for fully ended previous Months / Quarters.



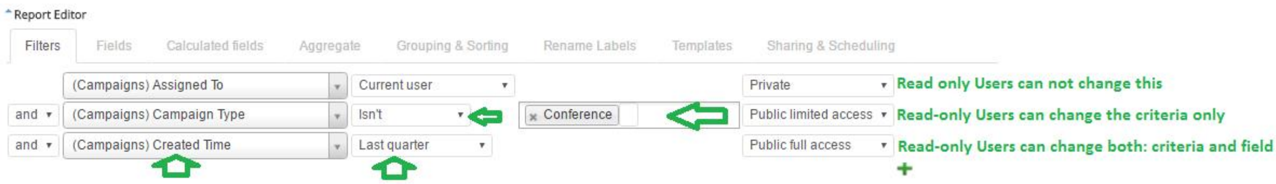
PERMISSIONS TO EDIT SELECTED FILTERS FOR READ-ONLY USERS

Users with 'View' report permissions, considered as 'Read-only users', can not edit any of the report settings at all. In some cases it is still necessary to allow a few filter changes by the Read-only users.

If you do not want to allow any edits to this filter from a Read-only user, keep the 'Private' setting for this filter.

If you want your 'Read-only' user to be able to change the filter criteria, without allowing to change the selected filter field, assign 'Public limited access'.

If the Read-only user should be able to change the filter field as well, assign 'Public full access' permission to the filter. In this case they will be able to change it to any other field, except those, selected as 'Private'.

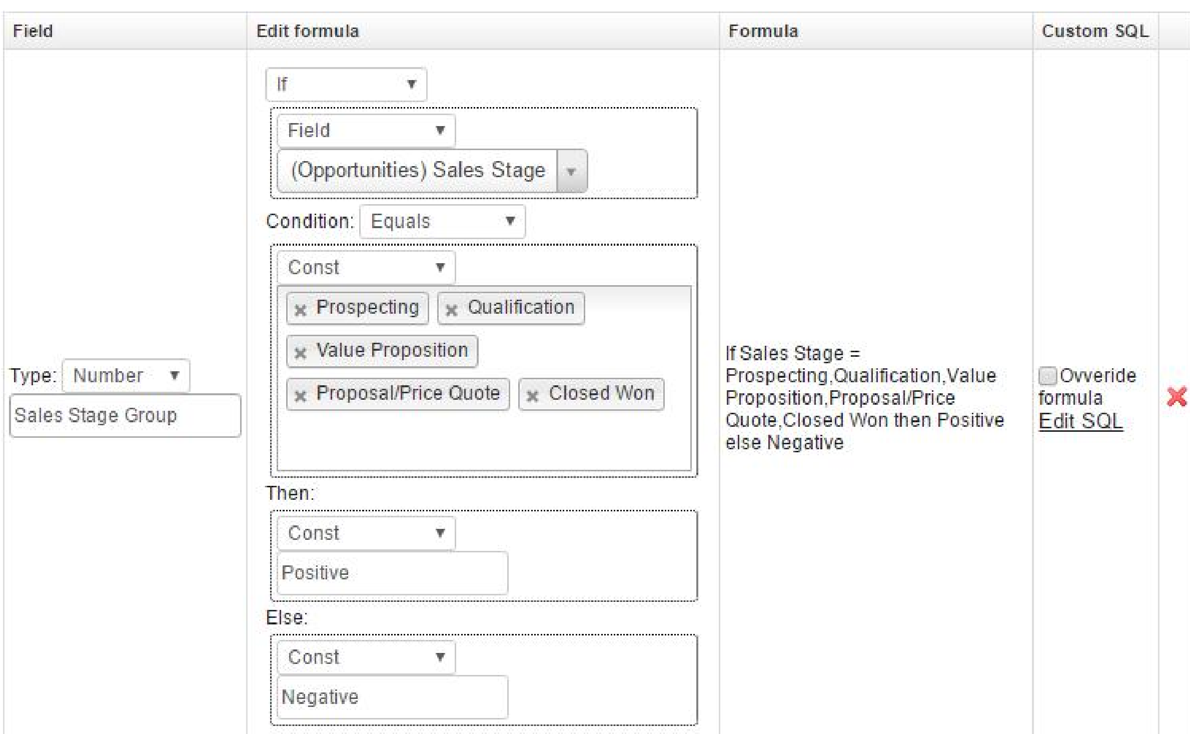


Please note, that any filter, even 'Private' will still be fully editable for all users having 'Edit' or 'Edit, Delete' permissions to this report.

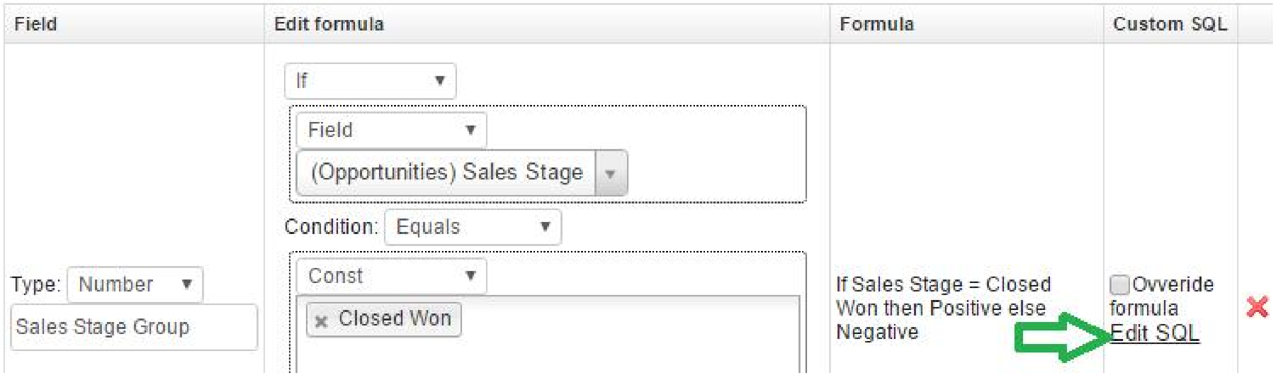
CALCULATED FUNCTION MANUAL EDITING & OTHER IMPROVEMENTS

You can now write the calculation script manually and several other improvements for Calculated functions.

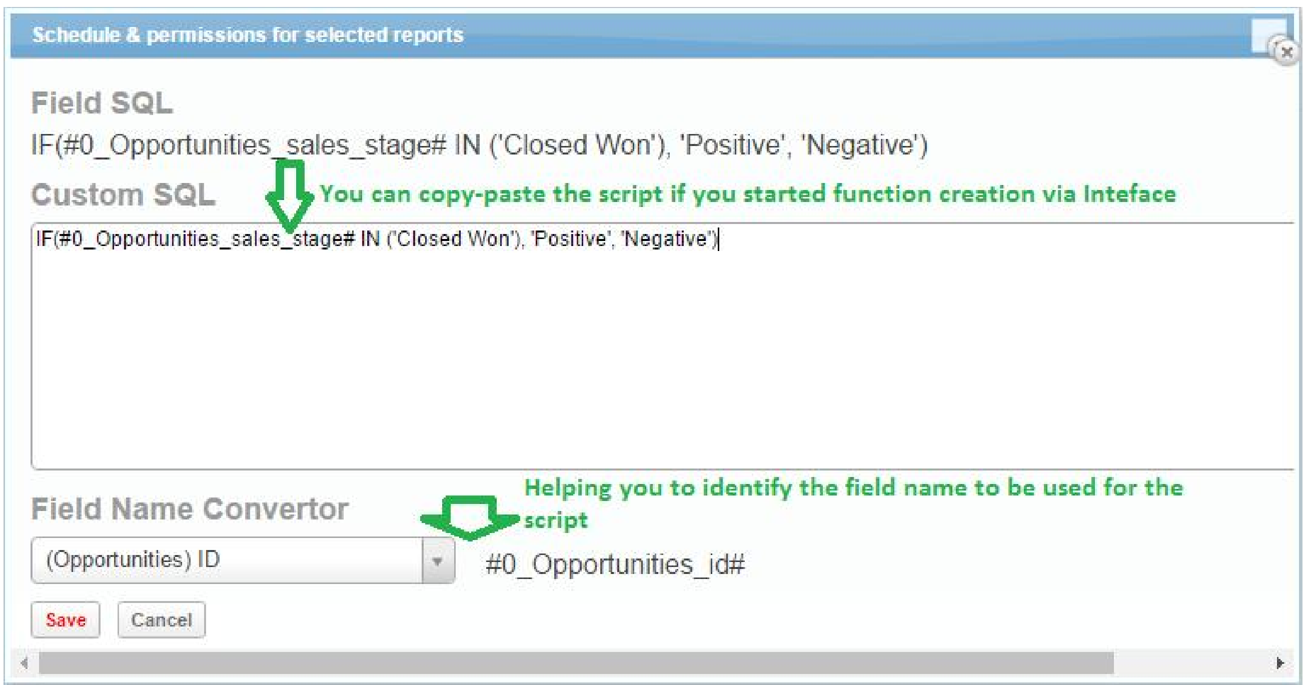
- Picklist values can now be selected under 'If…then' filters. You can select more than one picklist value at the same time.



- To edit the formula script manually, click ‘Edit SQL’ on the right side.



Important! If you edited and saved the custom script, you will no longer be able to edit it via the Interface. Added custom scripts can be further edited manually only.



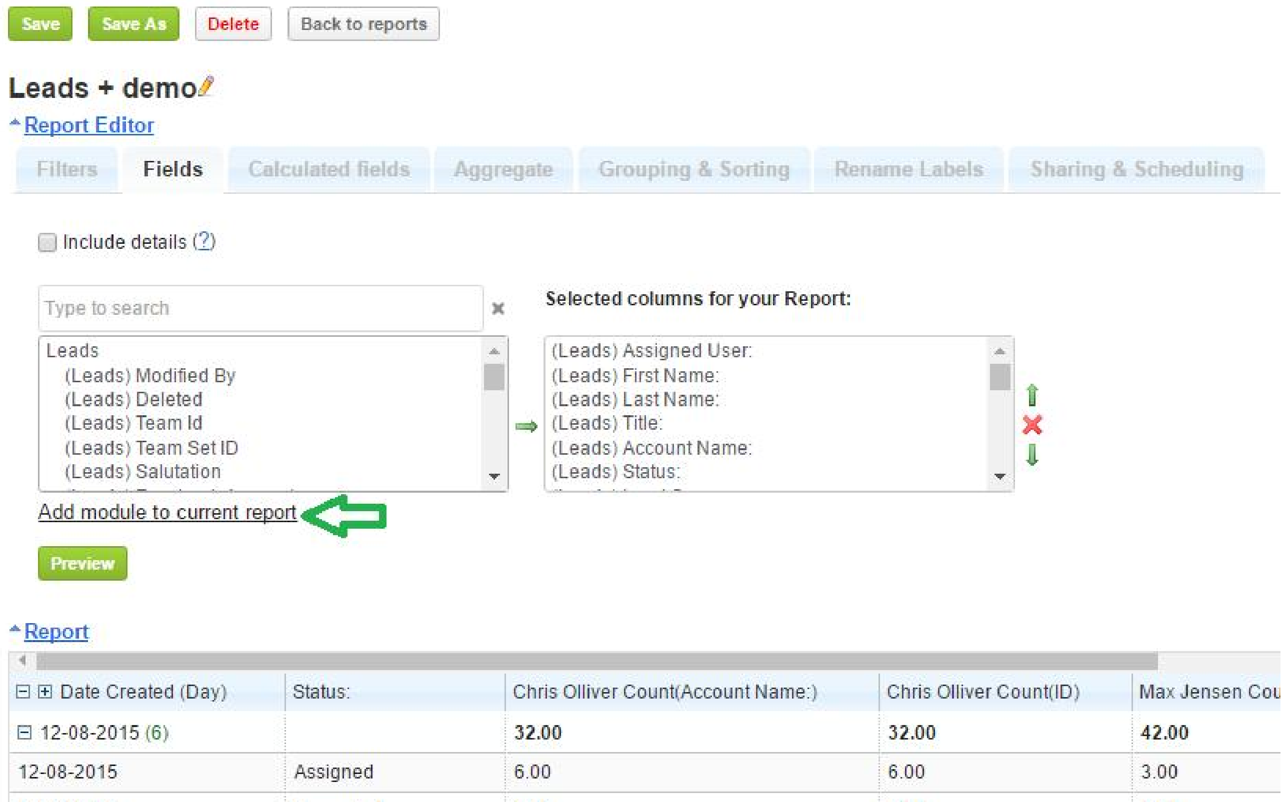
After editing the custom script, remember to save to make your function available for use.

The checkbox ‘Override formula’ allows you to switch between the manually edited script and the original formula (before editing). Keep the checkbox selected, if you wish to use the edited formula. Deselecting the checkbox will use the original function.

REVIEW OF PREVIOUSLY ADDED IMPROVEMENTS (released by June 6th)

ADDITIONAL MODULE ADDING TO ALREADY CREATED REPORTS

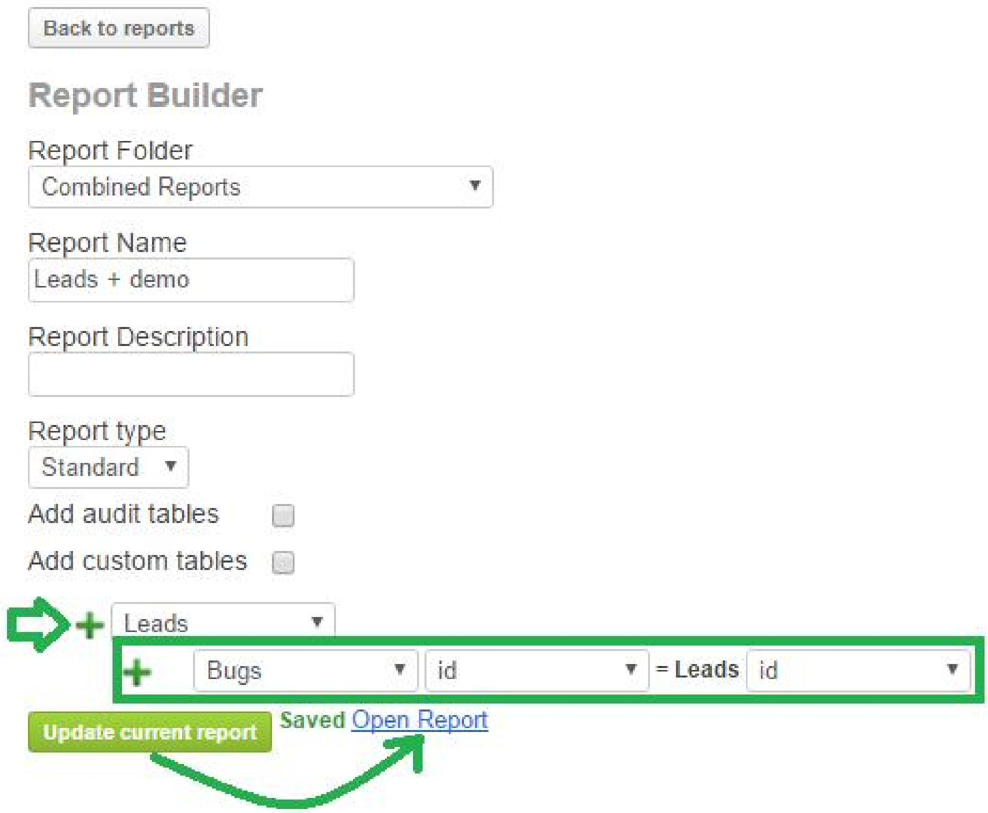
If your report or report template is already created with all the settings identified and later you need to add some fields from a module, which is not yet available under the “Fields” tab, it is possible to do so under the “Fields” tab.



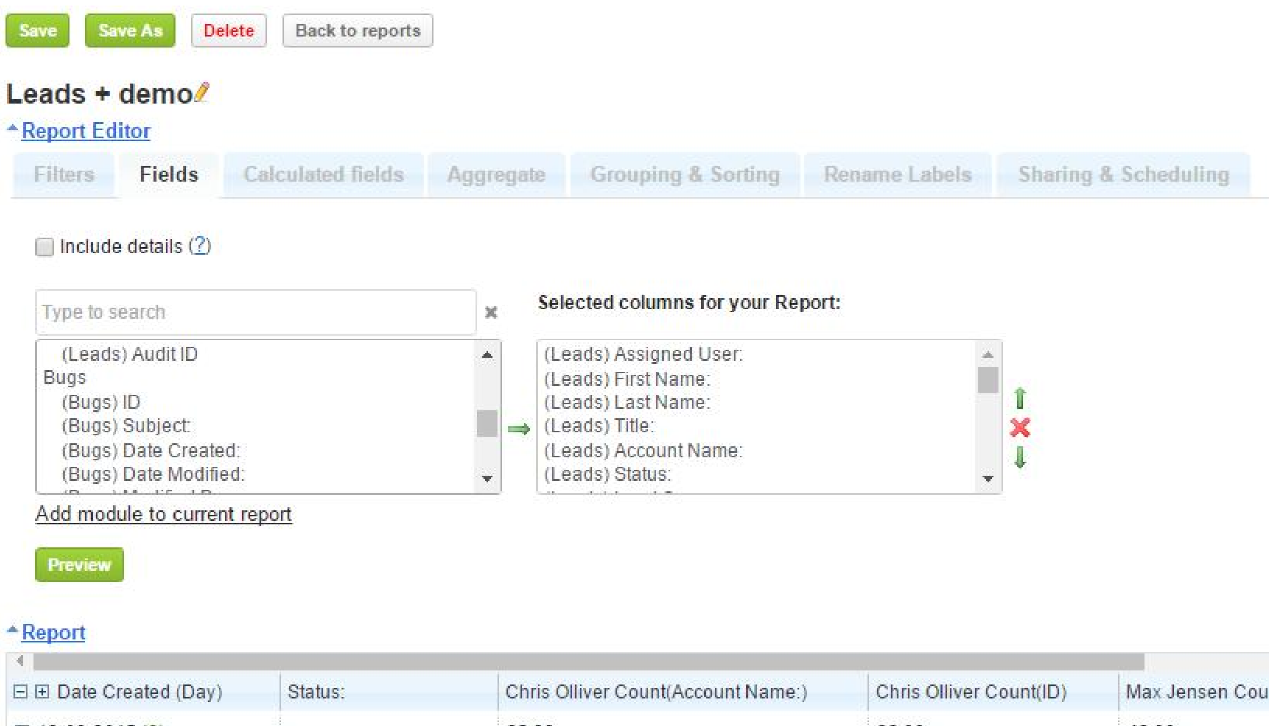
For data security purposes, only admin users can add modules to already created reports. This option is visible only to admin users.

In our example we have a report, which is related to the “Leads” module only. If we need to add the “Bugs” module, we click the “Add module to current report” link. This will open the “Report builder” screen. The identified report folder and report name is already identified, no need to change it. With the green “+” near the “Leads” module name, we add second row, where we select the “Bugs” module.

When the necessary additional module and the relationship are identified, we can click the “Update current report” button. The “Saved” text will verify the success of the update and the “Open Report” link will appear:



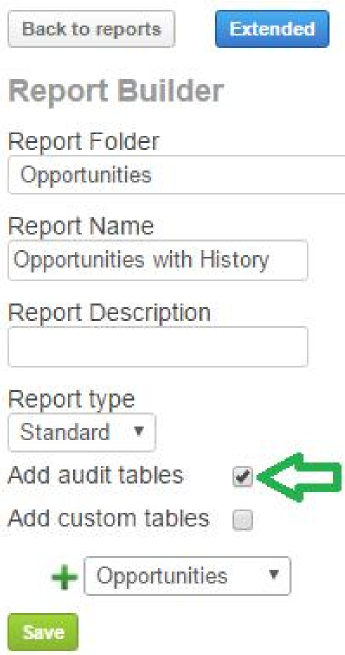
Please click the "Open Report" link to go back to your original report with the new module. Now, you can open again the "Fields" tab and you will see the new module with its fields added – they are now available to the report.



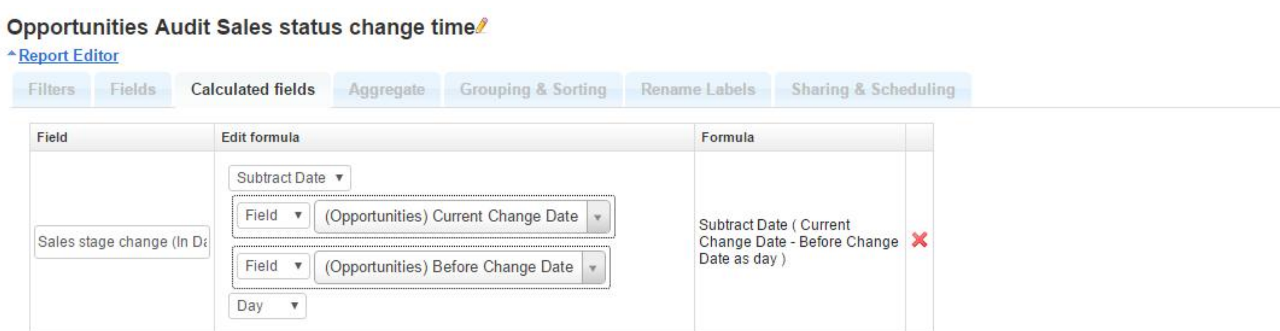
ADDING DATA FROM SUGAR HISTORY AUDIT TO YOUR REPORT

Sometimes it is necessary to see, for example, how long it took for one status to be changed to another. The system only shows you the current status, but if you keep your system data history audit, it is possible to analyze this data in a report as well. In order to add the data from history audit open the Report Builder.

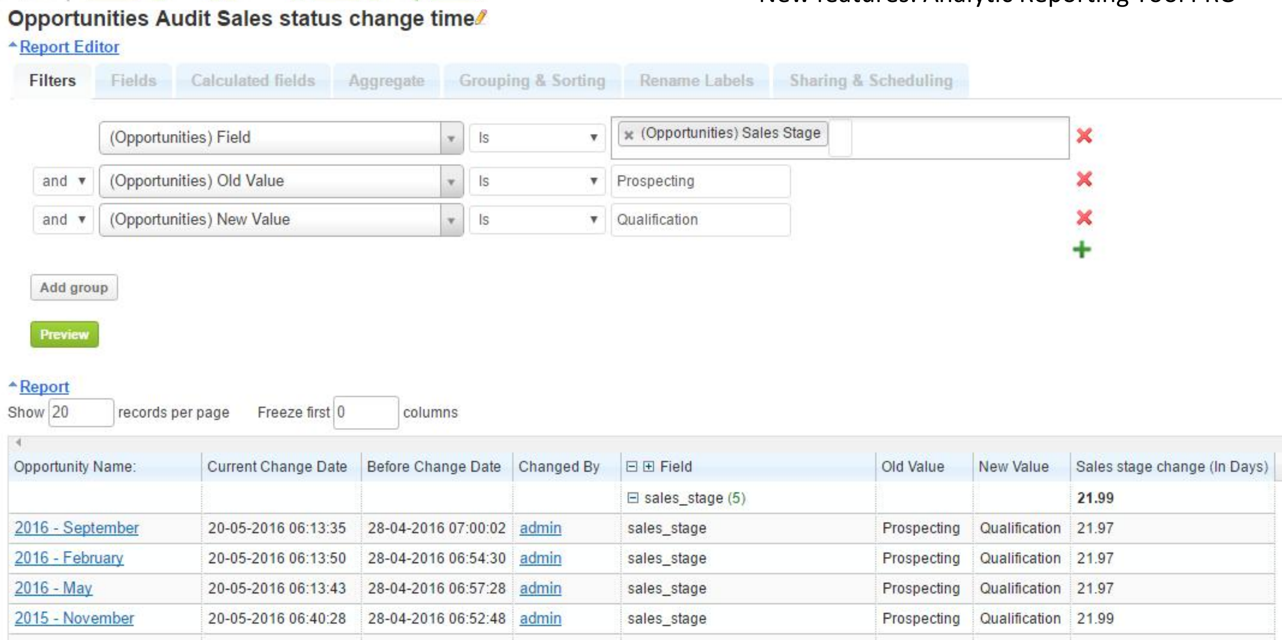
Select the necessary module and simply mark the ”Add audit tables” checkbox. Save and open the new report.



Now you can select the necessary fields from the audit table as well. If we want to calculate the time it took from the old value being changed to the new value, you can use “Calculated fields”, “Subtract Date” function as in the example below:



Normally you need to analyze the time, how long it took from one status value to be changed to another, please identify these necessary values in a filter, and you can already Preview the outcome:



Important: Please try to identify all your necessary filters before you click the “Preview” button, otherwise it might take a very long time to run, because the history audit can have a lot of data.

You are welcome to contact our IT Sapiens team at: info@itsapiens.eu for further questions!