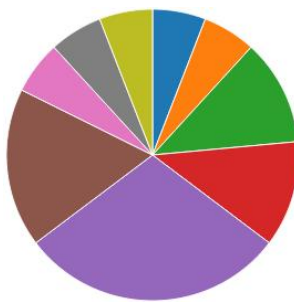


New Features

Analytic Reporting Tool PRO

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Last updated: January 7, 2017

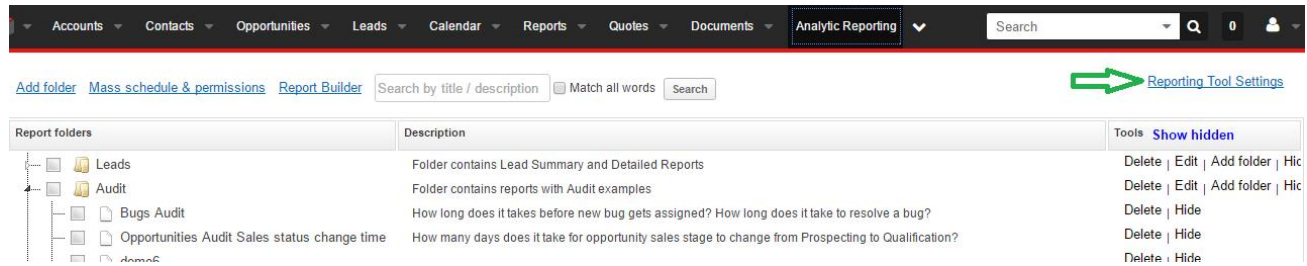
SNAPSHOT REPORTING FROM AUDIT HISTORY

It is now possible to create a Snapshot report for a given time period as well as periodically generate new snapshot data (i.e. by the end of each day, week or month). The Snapshot report is using data from Sugar/SuiteCRM history audit (this means that to keep track of changes - Audit History has to be enabled in Sugar/SuiteCRM via Module Builder).

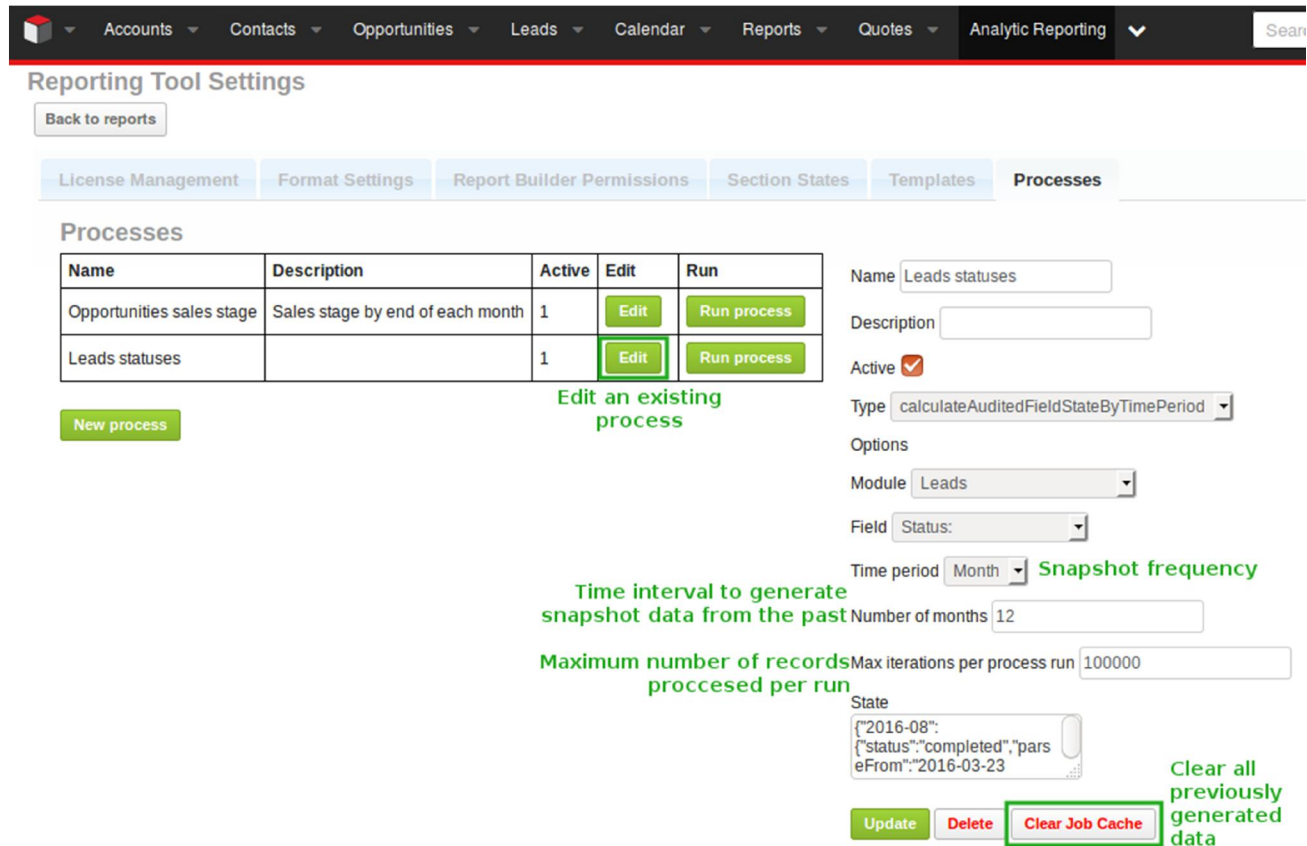
If this is the first time you want to start using the Audit History data for Snapshot reports, you need to generate the necessary data first.

In order to do that, open the "Reporting Tool Settings" found in the top-right corner of the Analytic Reporting Tool report and folder list.

(Please note that 'Reporting Tool Settings' are available only for users with Admin privileges.



If necessary you can edit the process before running it under 'Processes':



For the job type select 'calculateAuditedFieldStateByTimePeriod' as the other option 'calculateAuditedFieldStateByMonth' is there only for backwards compatibility and can be considered redundant.

Select the Module and Field of interest and choose the time period. The time period defines the snapshot frequency. A time period of "Day" will create snapshot data for each day. The 'Week' and 'Month' options will create snapshots at the end of each week and month respectively.

Click 'Run process' in order to create historical data for a given time period. The following example will create leads with leads statuses at the end of each month.

Reporting Tool Settings

[Back to reports](#)

License Management

Format Settings

Report Builder Permissions

Section States

Templates

Processes

Processes

Name	Description	Active	Edit	Run
Opportunities sales stage	Sales stage by end of each month	1	Edit	Run process
Leads statuses		1	Edit	Run process

[New process](#)

Process finished execution.Process with name 'Opportunities sales stage' fully completed.

Need to Run process and then wait till it completes. Please repeat it until this message appears

In the case of lots of data, you might need to run the process several times by clicking the same button 'Run process' again until the following green text appears: "Process finished execution".

On a more technical level 'Max iterations per process' defines the maximum number of records from the audit tables processed each run to create snapshot data. This setting can prevent the process from timing out on a lot of unprocessed audit data. This is why it might be necessary to run the process repeatedly initially. However, once all the initial snapshot data is generated and schedulers are set up data will be generated continuously. For instructions setting up the Scheduler see below.

Once the initial data is generated it is necessary to set up a Scheduler to automate continuous snapshot data generation. To set up a scheduler go to the Admin panel and select "Scheduler". Select the "Analytic Reporting Processes" job and choose a Job Name and interval settings most suitable to you and save the scheduled job. Once this is done everything is set up to start using the Snapshot report.

Go to the Report Builder and create your Snapshot report as any other report- select the report folder, enter the preferred report name and description, keep the report type 'Standard' and then select the necessary module.

It is important to remember to select 'Add custom tables' checkbox, as you can see in the example below:

[Back to reports](#) [Extended](#)

Report Builder

Report Folder
Leads

Report Name
Leads snapshot

Report Description

Report type
Standard

Add audit tables

Add custom tables **This checkbox will add generated snapshot table data**

+ Leads **Select necessary module**

[Save](#) **Please Save, than open saved report**

'Save' and open your new report.

Under the 'Fields' tab please select the fields "Date" and "Value" - those are the names of the generated snapshot data and can be found in the fields list under the "Snapshot" category.

[Save](#) [Save As](#) [Delete](#) [Back to reports](#)

Leads statuses

[Report Editor](#)

[Filters](#) [Fields](#) [Calculated fields](#) [Aggregate](#) [Grouping & Sorting](#) [Rename Labels](#) [Templates](#) [Sharing & Scheduling](#)

Include details (?)

Type to search

- Leads
- (Leads) ID
- (Leads) Date Created
- (Leads) Date Modified
- (Leads) Modified By
- (Leads) Created By

Selected columns for your Report:

- (Leads) Date
- (Leads) Value

Under 'Aggregate' please select Leads(Value) to 'Count'.

Leads statuses

[Report Editor](#)

[Filters](#) [Fields](#) [Calculated fields](#) [Aggregate](#) [Grouping & Sorting](#) [Rename Labels](#) [Templates](#) [Sharing & Scheduling](#)

Include details (?)

Field	Min	Max	Sum	Average	Count	
(Leads) Value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

+

Under 'Grouping & Sorting' select the grouping and sorting options for your Summary report according to example below:

Include details (?) Pivot (Matrix) (?) Aggregates as column Empty values as 0

Level	Action	Group by	Sort	Position	
1	Group ▾	(Leads) Value ▾		Row ▾	✘
2	Group ▾	(Leads) Date ▾ Month with year ▾		Column ▾	✘

+

Select summaries to show in this report:

Group	Count(Value)
Value	<input checked="" type="checkbox"/>
Date (MonthAndYear)	<input checked="" type="checkbox"/>
Grand Total <input type="checkbox"/> On both sides	<input type="checkbox"/>

Preview

Report

Value	2016-Mar Count(Value)	2016-Apr Count(Value)	2016-May Count(Value)	2016-Jun Count(Value)	2016-Jul Count(Value)	2016-Aug Count(Value)
	1,407	1,407	1,407	1,407	1,407	1,407
Assigned	1,457	1,457	1,457	1,457	1,457	1,457
Converted	1,421	1,421	1,421	1,421	1,421	1,421
Dead	1,447	1,447	1,447	1,447	1,447	1,447
In Process	1,401	1,401	1,401	1,401	1,401	1,401
New	1,431	1,431	1,431	1,431	1,431	1,431
Recycled	1,436	1,436	1,436	1,436	1,436	1,436

The summary report is now ready for use.

Continuing with our Lead status report we will create a chart for our report as well. In this example we will create an Area Chart that illustrates the changes in Lead statuses over the course of time.

For the horizontal axis and legend we choose the 'Date Month with year' grouping and for the vertical axis the value count aggregate. Since the Value grouping we have defined we will get nice data series for each individual Lead status.

DETAILED INFO ON TOP FIRST/LAST GROUPED ITEMS

There are cases when you need to see detailed information of the first or last activity or opportunity by customer or by user, for example. Till now, if you could group by User, Customer etc., then you could either see all detailed information of all activities (without the option to filter first/last) or you could see the first/last date of the activity, opportunity or other (or any other min/max value), but there was no way to see detailed information, like Subject, description etc. of this first/last entry.

Now you can select to filter one or several first/last/min/max grouped entries.

In our example we want to see the last task information for each opportunity. We need to see Account Name, Opportunity name, Opportunity ID and Task Subject, Description and Date Created. In order to do this,

1. We select the necessary fields under 'Fields' tab and keep 'Include details' checked.

Include details (?)

Type to search x

- (Opportunities) Sales Stage:
- (Opportunities) Probability (%):
- (Opportunities) checkbox
- (Opportunities) decimaltest
- (Opportunities) floatest
- Tasks
- (Tasks) ID

→

Selected columns for your Report:

- (Accountsss) Name:
- (Opportunities) ID
- (Opportunities) Opportunity Name:
- (Tasks) Subject:
- (Tasks) Description:
- (Tasks) Date Created

↑
✖
↓

[Add module to current report](#)

Preview

2. Under 'Grouping and sorting' we first select to group by 'Opportunity ID' field and then for the second level 'Group & sort' option - 'Task Date Created'. We select 'Descending' to see the most recent dates (or 'Ascending' if we wished to see the first or oldest ones). Define the number of 'Show Top' entries. Type '1' if you need to see only the latest detailed Task information by each Opportunity.

Level	Action	Group by	Sort	
1	Group ▼	(Opportunities) ID ▼	Show Top <input type="text" value="All"/>	✖
2	Group & Sort ▼	(Tasks) Date Created ▼ Original Value ▼	Descending ▼ Show Top <input type="text" value="1"/>	✖



You can choose any value for 'Show Top' in case you wish to see several last activities by opportunity.

ADDED CITIES TO GEOGRAPHIC CHART

Geographic charts are a great way to visualize your data! Besides Country and State you can now also show data on Cities. City data is currently available for the United States of America, Canada, Brazil and major European countries.

We are constantly extending the list of supported Countries for the Geographic chart. Please email us at info@itsapiens to inquire about specific Country support and we will add support for Cities in that Country in case it is currently unsupported.

To create a Geographic chart with Cities you will need a report that has Grouping by Country and City and some cases also State/Province for disambiguation.

In our example we will create a Geographic Chart to display Accounts by Industry on a City to City basis. Our grouping options are as follows:

Filters Fields Calculated fields Aggregate **Grouping & Sorting** Rename Labels Templates Sharing & Scheduling

Include details Pivot (Matrix) Aggregates as column Empty values as 0

Level	Action	Group by	Sort	Position	
1	Group & Sort	(Accounts) Shipping State:	Shipping State: Ascending	Row	✗
2	Group & Sort	(Accounts) Shipping City:	Shipping City: Ascending	Row	✗
3	Group & Sort	(Accounts) Shipping Country:	Shipping Country: Ascending	Column	✗
4	Group & Sort	(Accounts) Industry:	Industry: Ascending	Row	✗

+

We have grouped our report by Country, State and City. We have also grouped and aggregated the count of our field of interest – Industry. The report is ready at this point but you might also want to change other Report options like Filters.

We select the Geographic Chart type and under Legend & Axis we set all the options and fields to match our report. Match the Country, State and City fields and identify the value which will be displayed on the density-colored Map

Chart type Legend & Axis

Map For: City **Map mode: Country, State or City**

Identify Country: (Accounts) Shipping Country: **Selection of Country, State and City fields from the report**

Identify State: (Accounts) Shipping State:

Identify City: (Accounts) Shipping City:

Value: (Accounts) ID Count

Map with pie chart **Various options for displaying data on the chart.**

Legend: (Accounts) Industry:

Value: (Accounts) ID Count

Map with pie chart allows for more detailed information.

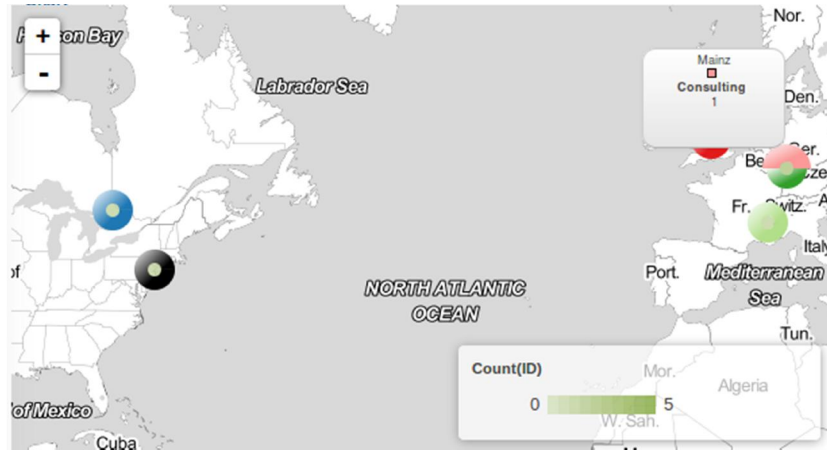
Preview

Markers.

The “Map with Pie chart” adds a small Pie Chart on top of the Regular Map Marker with a more detailed breakdown of the data. You can display different values for the regular markers and the Pie Chart.

Regular Map Markers are heat colored for better visibility of low density regions. Adding Pie Charts changes the coloring to a green shaded scale for less color clutter.

As an end result we get all our data beautifully displayed on the Geographic Chart with great visual insights and flexibility.




COUNT UNIQUE VALUES


Simply selecting 'Count' under 'Aggregate' tab would count all records in the report, while 'Count Distinct' would count unique values only.

For example, create a report of Organizations with Opportunities, where 5 Organizations are related to 10 Opportunities in Total. If you need to count, how many Organizations there are, you should select 'Count Distinct' – for 'Organization Name'. This will return the correct number: '5'. If you select just 'Count' for 'Organization Name' instead, it will return 10 (no matter, if you choose 'Count' for Account Name or Opportunity, since 'Count' returns the total count of all rows).

Filters Fields Calculated fields **Aggregate** Grouping & Sorting Rename Labels Templates Sharing & Scheduling

Include details (?) 

Field	Min	Max	Sum	Average	Count Distinct	Count	
(Opportunities) Organization Name ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✗
(Opportunities) Opportunity Name ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗



Report

Show records per page Freeze first columns

Organization Name	Count Distinct(Organization Name)	Count(Organization Name)	Count Distinct(Opportunity Name)
X-CEED INC 99	1	1	1
vtigerCRM Inc	1	1	1
t3M Invest A/S	1	1	1
Sunny Days Hotel	1	2	2

If you have missed the previous updates, you will learn more about them by reading this document:

http://www.bisapiens.com/public/file/news/2016/NewFeatures_AnalyticReportingPRO_Sept_2016.pdf

It covers:

- ADDING YOUR OWN EXCEL TEMPLATES
- NEW CHART TYPE: AREA CHART
- HORIZONTAL BAR CHART
- ADDITIONAL FILTERS: TEAM, # OF PASSED WEEKS, MONTHS, QUARTERS
- PERMISSIONS TO EDIT SELECTED FILTERS FOR READ-ONLY USERS
- CALCULATED FUNCTION MANUAL EDITING & OTHER IMPROVEMENTS
- ADDITIONAL MODULE ADDING TO ALREADY CREATED REPORTS
- ADDING DATA FROM SUGAR/SUITECRM HISTORY AUDIT TO YOUR REPORT

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