

SedonaAnalytics

Presented By: Brad Swindell OPT Business Services, Inc.

Identify, Analyze, Visualize



SedonaAnalytics Leverage the Power of *Your* Data



SedonaAnalytics is SSBI

- Self Service Business Intelligence
- (SSBI) is an approach to data analytics that enables business users to access and work with data without the IT department's involvement.



What does it do?

- With SedonaAnalytics you can access all of your data to create your own insights.
- Analyze your data by grouping, filtering, sorting, and aggregating by using the simple controls.
- Create and save your own visualizations and dashboards with a few clicks of the mouse.
- Create reports from your data visualizations and even include your dashboard elements.



How does it work?

- SedonaAnalytics is a web portal that will be setup on your internal web server as an Intranet or a Internet website just like SedonaWeb.
- Once installed all of your data will be accessible to start creating your reports and dashboards immediately.
- Each user creates their own elements and saves them to their own portal. However these reports and dashboards can be shared between users.

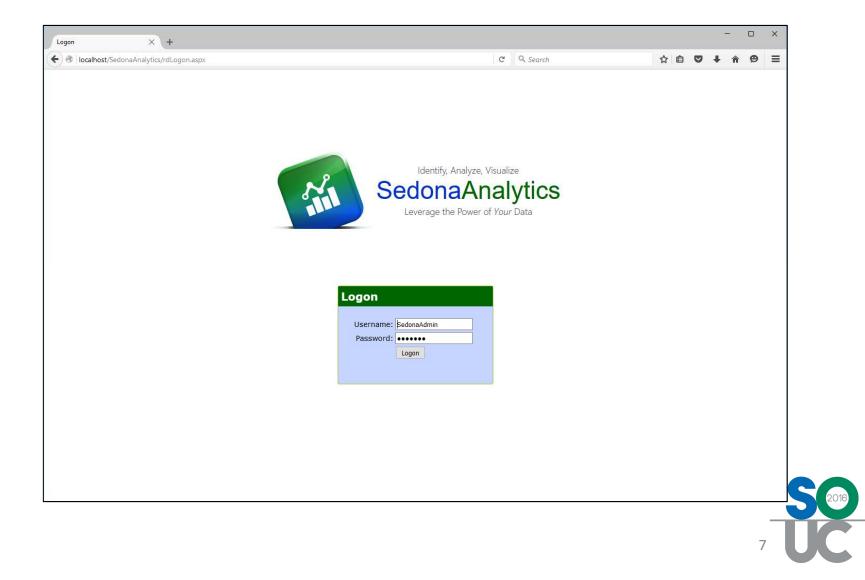
And the Best Part?

Included with SedonaOffice – No Charge

- SedonaAnalytics is a Self Install Application, however we will provide a step by step installation guide.
- We will be doing a series of training webinars shortly after the final release which will also be posted to our websites.
- Additional 1-on-1 training and installation support is available through SedonaOffice or OPT Business Services for a fee.



Login Methods

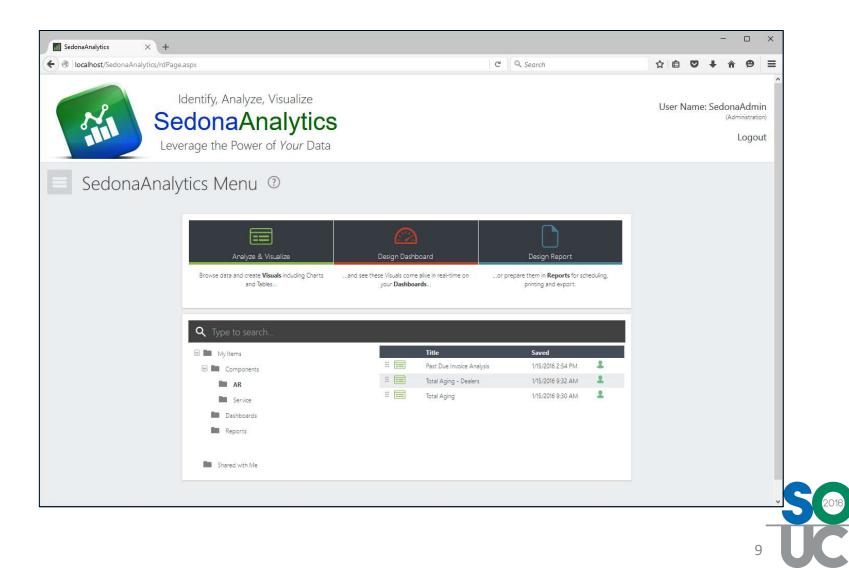


Login Methods

- Login via SedonaOffice
- Login via Portal Directly



Home Page – Key Components

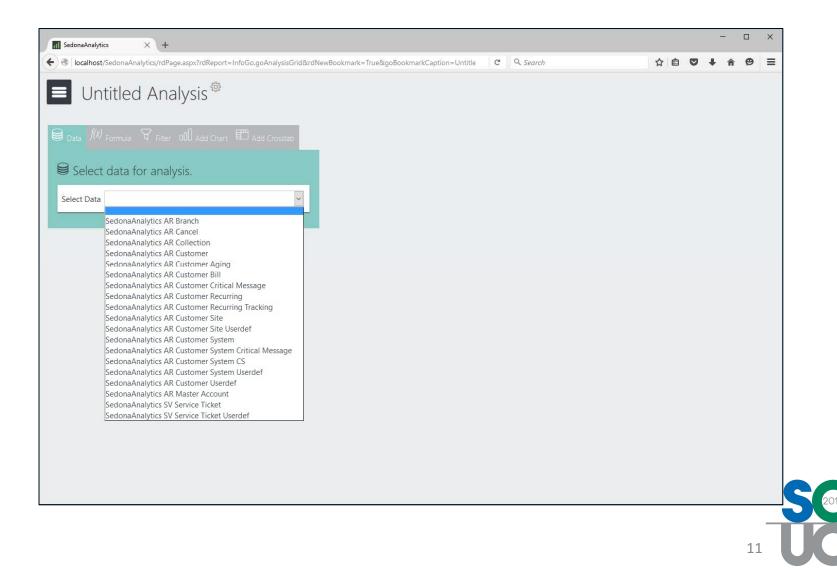


Home Page – Key Components

- Analyze and Visualize
- Design Dashboard
- Design Report
- Bookmark Organizer
 - Private Folders
 - Shared with Me
 - Schedule Report
 - Sharing Item



Create Analysis Components

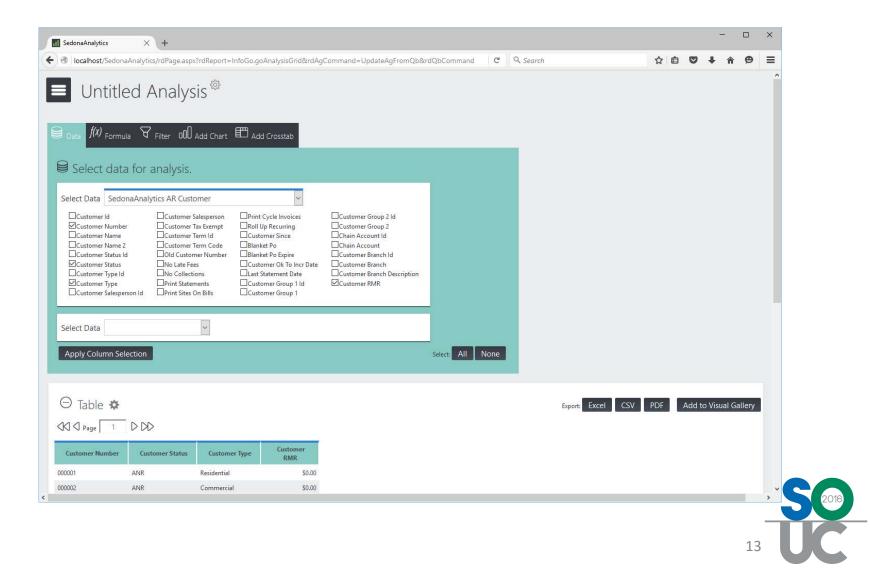


Create Analysis Components

- Select Primary DataSet to Start
- Additional DataSets can be Added Once the Primary DataSet is Selected
- More DataSets will be Available After the Rollout Period



Analysis - Data

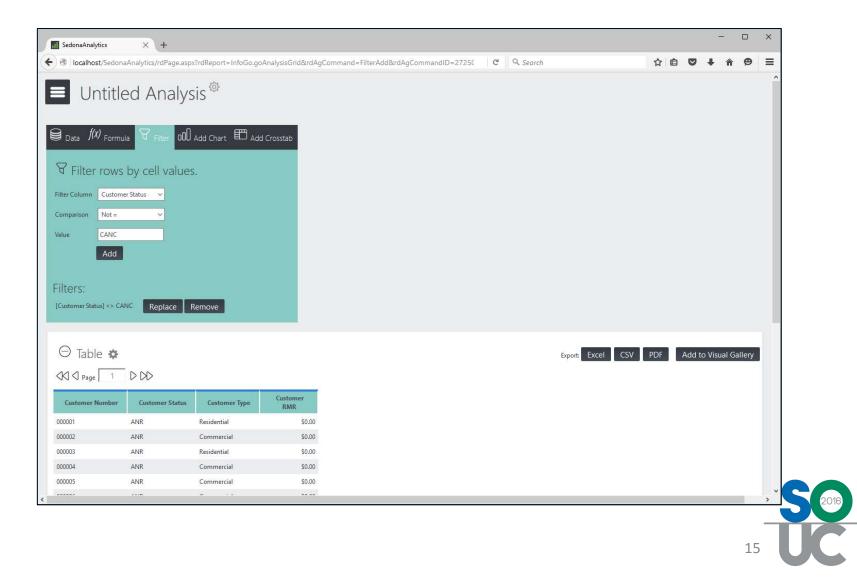


Analysis - Data

- Select Data Columns for Analysis
- Add Additional Data Sets
- Create Formula Columns



Analysis - Filters

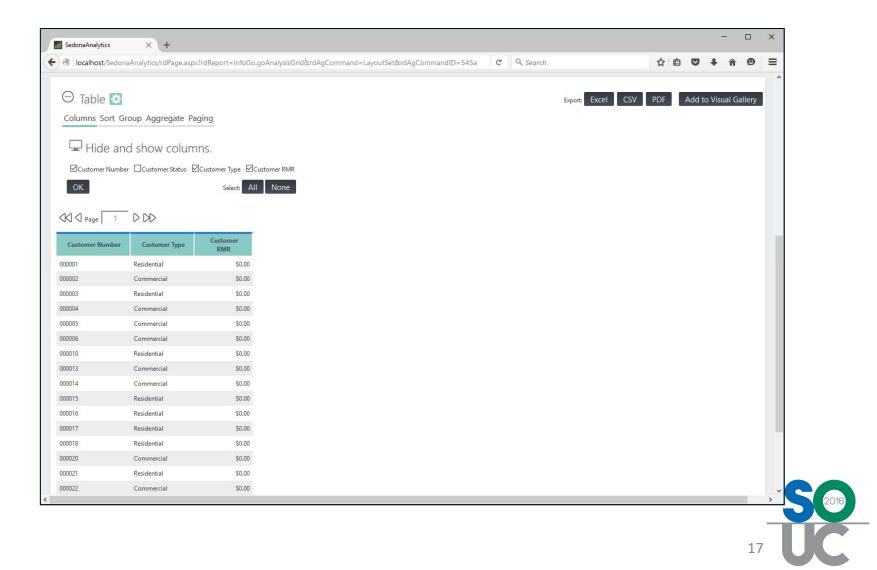


Analysis - Filters

- Filter Data to be Analyzed
- Standard Boolean Operators
- Group Filters for OR Statements
- Filters Apply to Entire Analysis



Analysis – Grid Columns

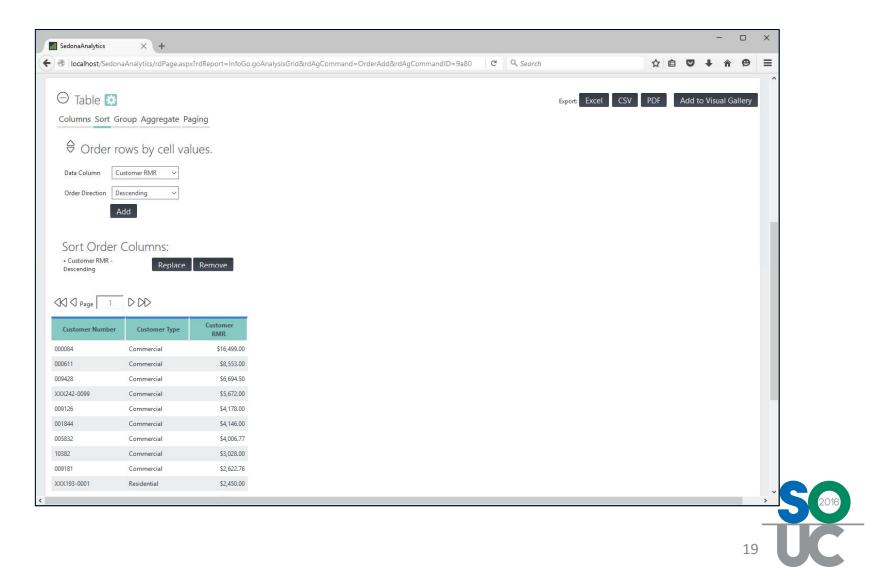


Analysis – Grid Columns

- Hide / Show Grid Data Columns
- Columns Must be Selected Above to be Available to be Displayed
- Hidden Columns are Still Available to be Sorted, Grouped, or Aggregated



Analysis – Sorting

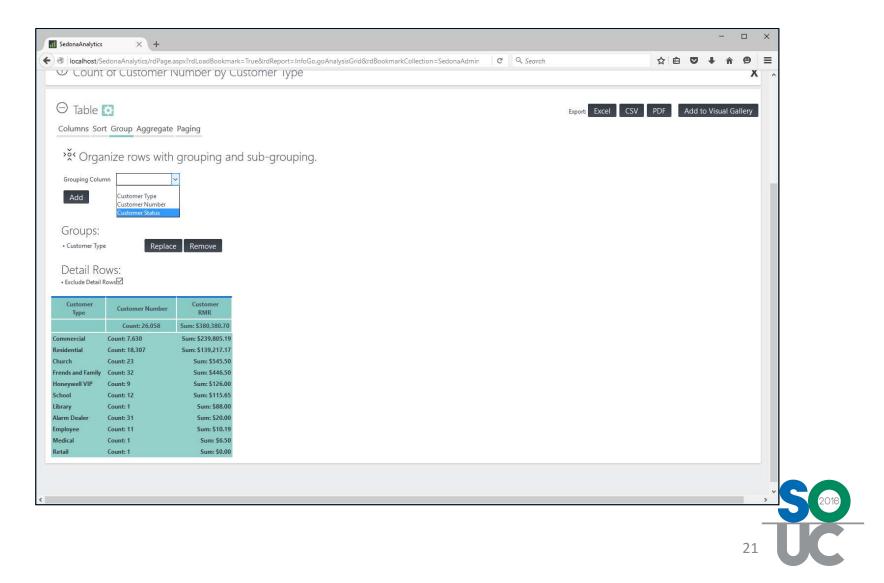


Analysis – Sorting

- Sort by One or More Analysis Columns
- Sort Ascending or Descending
- Grouping Automatically Sorts



Analysis – Grouping

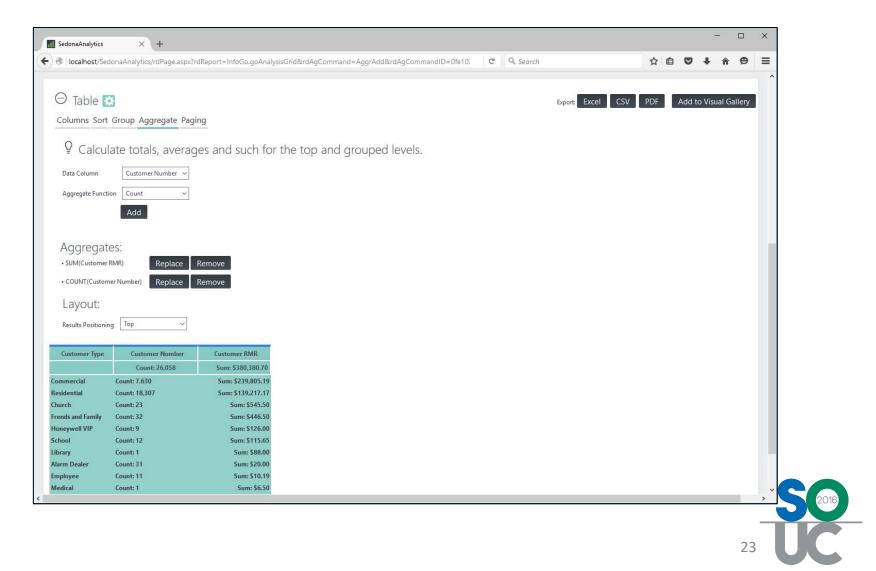


Analysis – Grouping

- Sort by One or More Analysis Columns
- Sort Ascending or Descending
- Grouping Automatically Sorts
- Show/Hide Detail Rows



Analysis – Aggregation

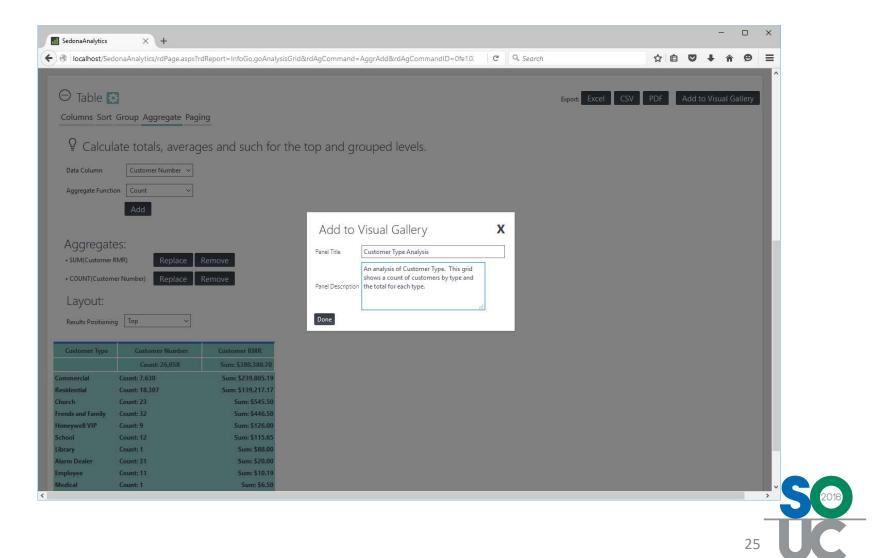


Analysis – Aggregation

- Aggregates are Calculations
 Preformed Against the Data
- Some Examples are:
 Count, Sum, Average
- Aggregates Apply to the Groups you Setup in Addition to the Gird



Analysis – Add to Visual Gallery

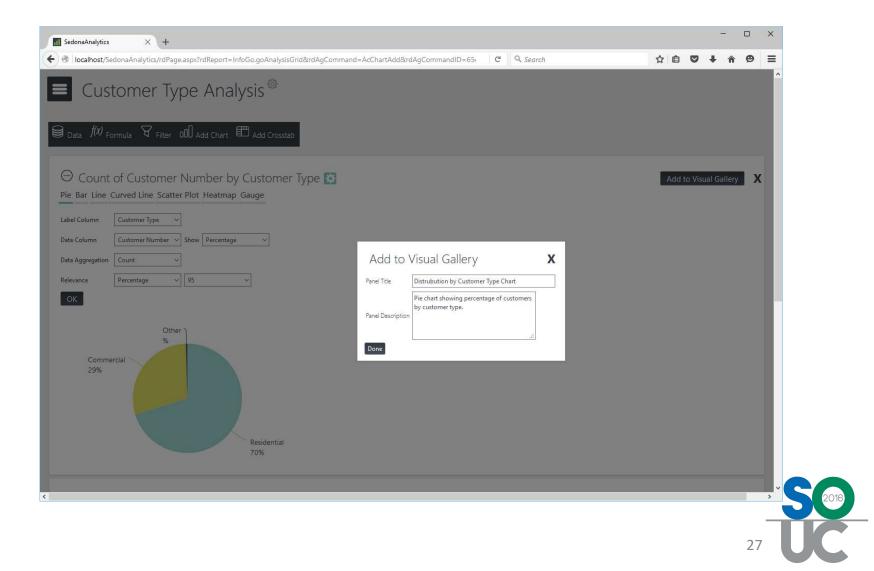


Analysis – Add to Visual Gallery

- Add Items to the Visual Gallery to be used in Dashboards and Reports
- Once Items are Added they Cannot be Changed Directly
 - Be Sure to Save the Analysis Page



Analysis – Pie Chart

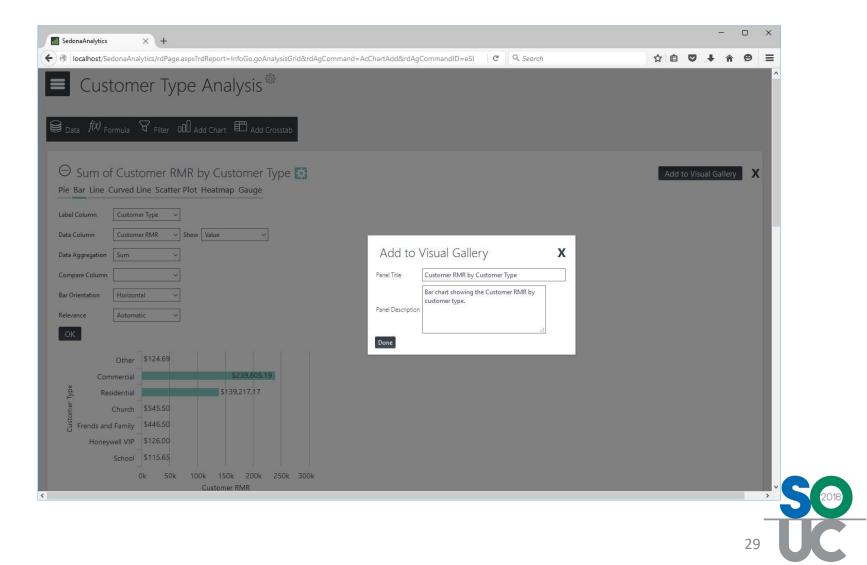


Analysis – Pie Chart

- Charts are Based on Analysis Data Only and do Not Reflect the Grid Options
- Label Column: The Chart Group
- Data Column: What is Measured
- Data Aggregation: Measured How
- Use the Relevance Filter to Hide Results with Little Impact or Importance.
- Add the Pie Chart to the Visual Gallery



Analysis – Bar Chart



Analysis – Bar Chart

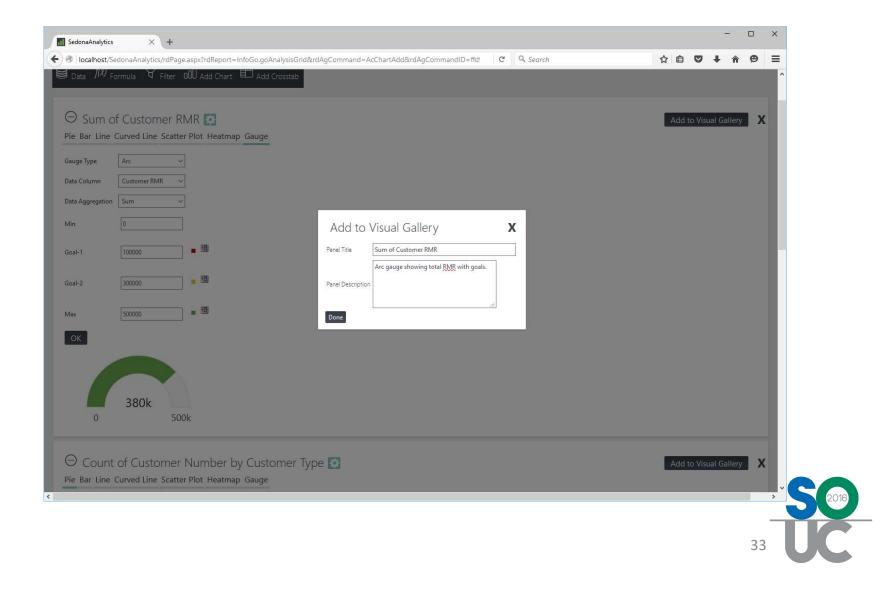
- Add Additional Charts for Different Visualizations of the Data to Gain Different Insights.
- Compare Columns: Additional Groups
- Add the Bar Chart to the Visual Gallery



| 📶 SedonaAnalytics 🛛 🗙 🕂 | | - 0 × |
|---|---|-------------------------|
| O I localhost/SedonaAnalytics/rdPage.aspx?rdReport=InfoGo.go/ | AnalysisGrid&rdAgCommand=AcChartAdd&rdAgCommandID=ffd! | ☆ 🖻 🛡 🖡 伦 🚍 |
| 😸 Data <i> (W</i>) Formula 🖌 Filter 💷 Add Chart 🖽 Add | Crosstab | ^ |
| ⊖ Sum of Customer RMR Pie Bar Line Curved Line Scatter Plot Heatmap Gauge | | Add to Visual Gallery X |
| Gauge Type Balloon Bar ~ Data Column Customer RMR ~ | | |
| Data Aggregation Sum | Add to Visual Gallery X | |
| Min 0 Geal-1 100000 | Panel Trile Sum of Customer RMR Gauge showing total RMR with Goals. | |
| Goal-2 300000 | Panel Description | |
| Max 500000 m 🗰 | | |
| ок [380k] | | |
| | | |
| 0 100k 200k 300k 400k 500k | | |
| Θ Count of Customer Number by Customer Pie Bar Line Curved Line Scatter Plot Heatmap Gauge | | Add to Visual Gallery X |
| | | > |
| | | _ |
| | | 31 |

- Gauges Visualize a Single Statistic and Allows for a Pair of Goal to be Set.
- Min: Bottom of the Gauge
- Max: Top of the Gauge
- Goal 1: Immediate Goal
- Goal 2: Long Term Goal
- Add the Gauge to the Visual Gallery

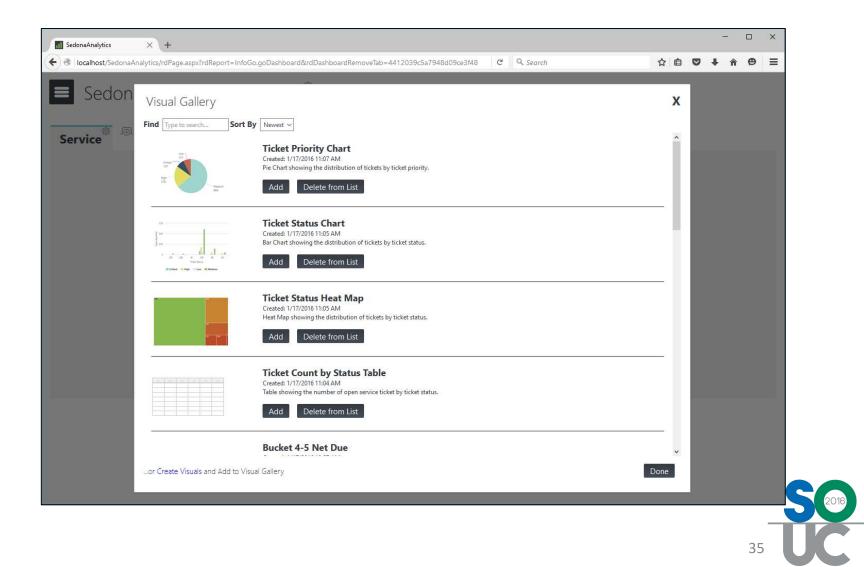




- Additional Gauge Types Include:
 - Arc (Shown)
 - Balloon Bar (Previous Slide)
 - Bullet Bar
- Additional Charts Include:
 - Line
 - Curved Line
 - Scattered Plot
 - Heatmap



Dashboards – Visual Gallery

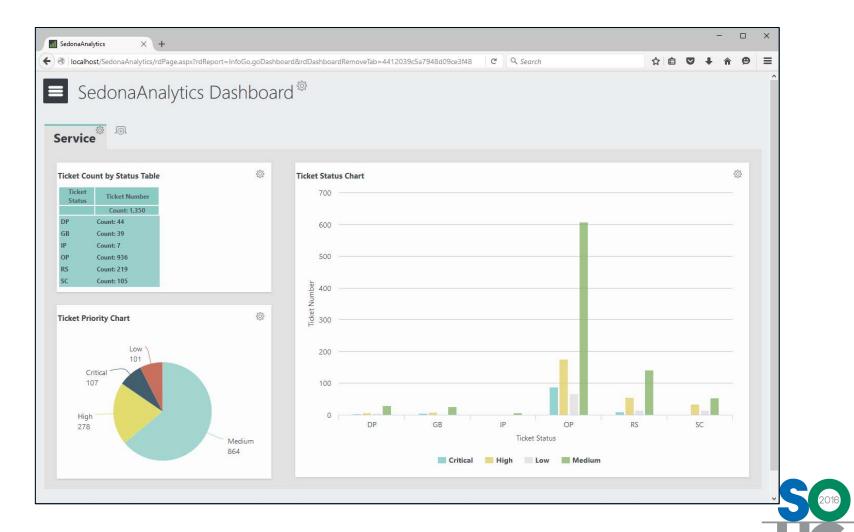


Dashboards – Visual Gallery

- Dashboards Display Previously Created Elements from the Analysis Configurations.
- These Items are Stored in the Visual Gallery.
- Each Users has their own Visual Gallery



Dashboards – Item Layout



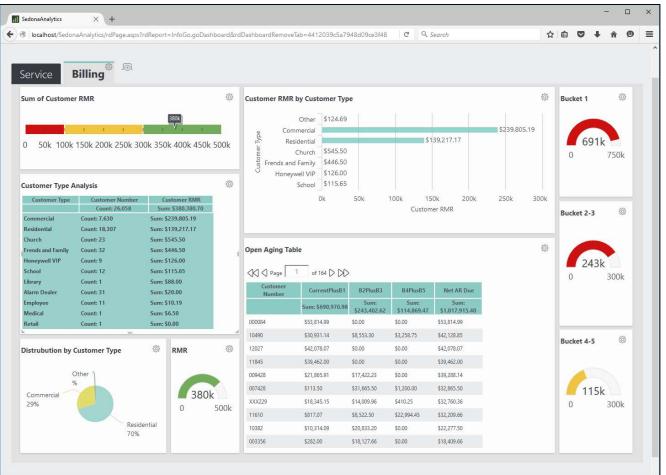
37

Dashboards – Item Layout

- Dashboards can Contain both Chart/Gauges and Analysis Grids.
- The Layout can be Customized from the Number of Columns.
- Elements will Snap into Place when Columns are Active.



Dashboards – Tabs / Flex



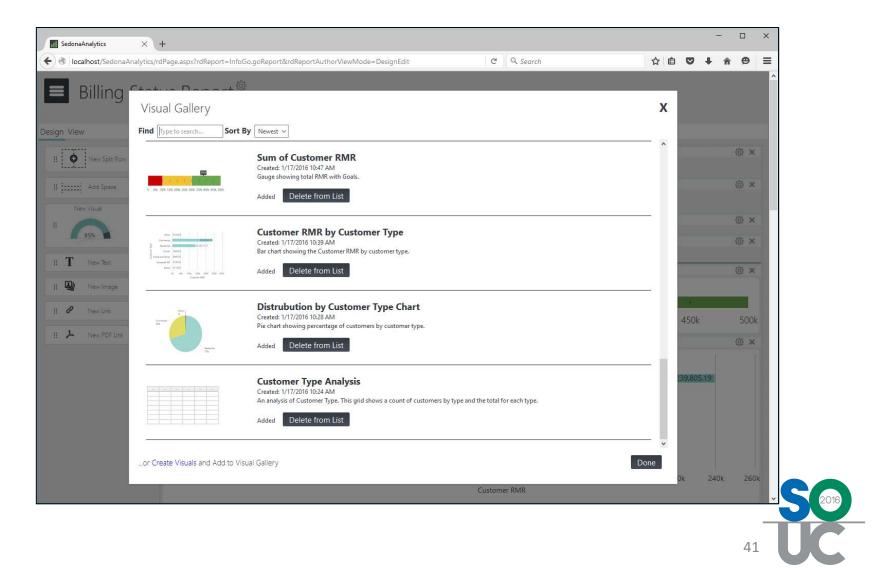


Dashboards – Tabs / Flex

- Additional Named Tabs can be Created.
- The Flex Layout Allows for Exact Positioning as Desired.
- Elements can be Moved, Resized, and Renamed as Needed.



Reports – Visual Gallery



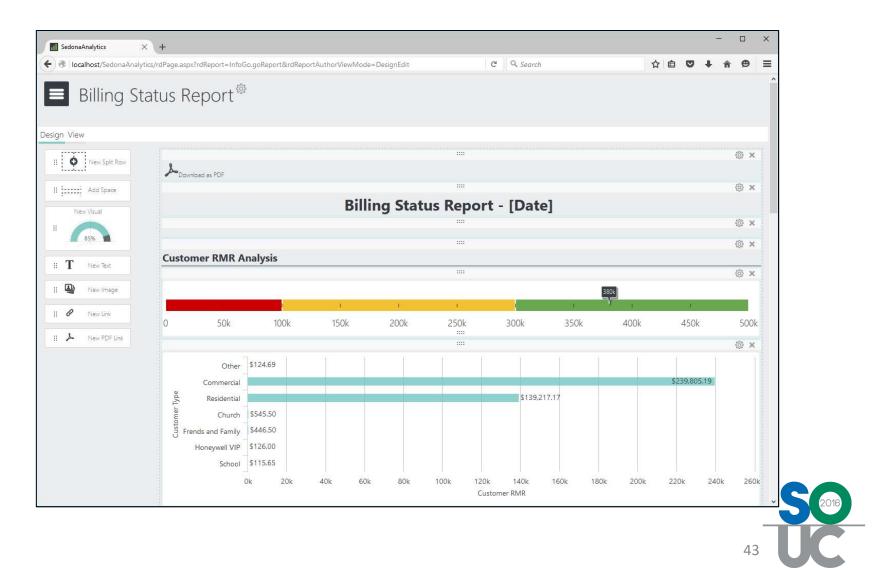
Oper

Reports – Visual Gallery

- Reports Display Previously Created Elements from the Analysis Configurations.
- The Visual Gallery can be Searched and Sorted.
- Take Advantage of the Description Field to Describe the Elements.



Reports - Layout

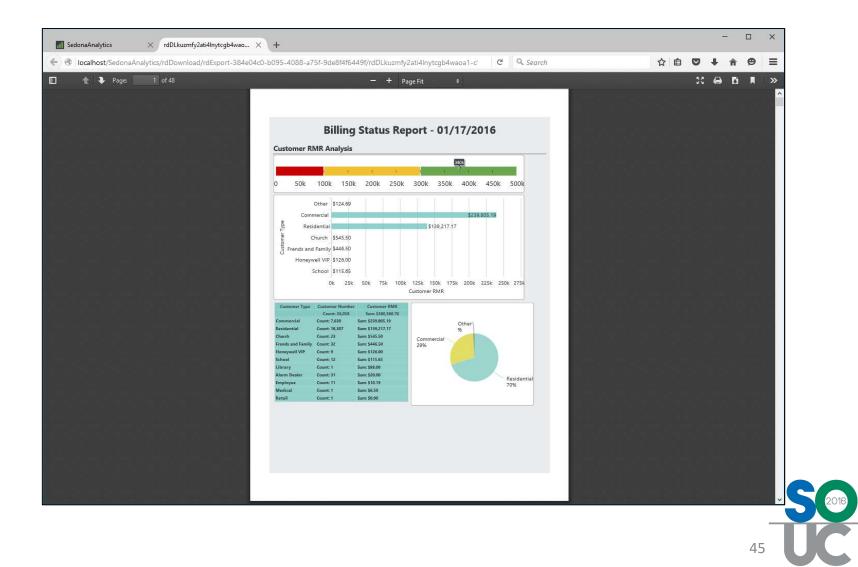


Oper

Reports - Layout

- Flexible Report Layout
- Create Columns and Nested Tables
- Add Static Text (ie: Header/Footer)
- Include Images (ie: Logos)
- Include Links to Other Reports/Dashboards
- PDF Export Support





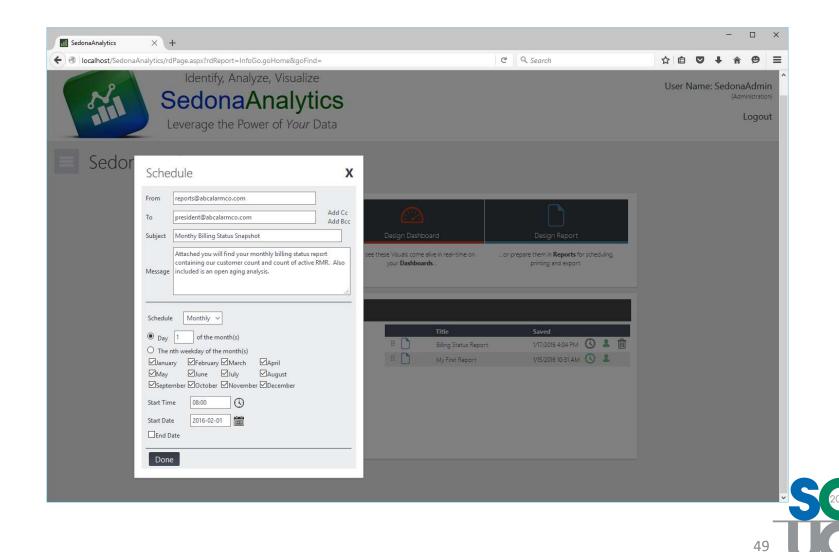


| Page: 2 of 48 | 1 | | | 4e04c0-b095-4088-a75f-9de8f4f6449f/rdDLkuzmfy2ati4lnytcgb4waoa1-c C Q Search | | | | | | | | | |
|---------------|-----------------|----------------------------|----------------------|--|----------------------------|-----------|------|--|--|--|---|-----|---|
| | | - + Page Fit ÷ | | | | | | | | | 8 | £ . | » |
| | | | | | | | | | | | | | ^ |
| | | | | | | | | | | | | | |
| | Open Aging | Analysis | | | | | | | | | | | |
| | Customer Number | | | B4PlusB5 | Net AR Due | Bucket 1 | | | | | | | |
| | | Sum: \$690,970.98 | | Sum: \$114,869.43 | | | | | | | | | |
| | 000064 | \$53,814.99 \$30,931.14 | \$0.00 \$8,553.30 | \$3,258.75 | \$53,814.99 \$42,128.85 | | | | | | | | |
| | 12027 | \$42,078.07 | \$0.00 | \$0.00 | \$42,078.07 | | | | | | | | |
| | 11845 | \$39,462.00 | \$0.00 | \$0.00 | \$39,462.00 | 69 | | | | | | | |
| | 009428 | \$21,865.91 | \$17,422.23 | \$0.00 | \$39,288.14 | 0 | 750k | | | | | | |
| | 007428 | \$113.50 | \$31,665.50 | \$1,200.00 | \$32,865.50 | | | | | | | | |
| | X00229 | \$18,345.15 | \$14,009.96 | \$410.25 | \$32,760.36 | Ducket 2 | - | | | | | | |
| | 11610 | \$817.07 | \$8,522.50 | \$22,994.45 | \$32,209.66 | Bucket 2- | -3 | | | | | | |
| | 10382 | \$10,314.09 | \$20,833.20 | \$0.00 | \$22,277.50 | | | | | | | | |
| | 003356 | \$282.00 | \$18,127.66 | \$0.00 | \$18,409.66 | | | | | | | | |
| | 11952 | \$4,888,13 | \$8,487.26 | \$2,919.57 | \$16,294,96 | 24 | 3k | | | | | | |
| | 009576 | \$4,696.37 | \$123.29 | \$9,897.19 | \$14,716.85 | 0 | 300k | | | | | | |
| | 005832 | \$17,252.16 | \$123.29 | \$246.58 | \$14,274.85 | h | | | | | | | |
| | 001844 | \$14,260.44 | \$0.00 | \$0.00 | \$14,107.58 | | | | | | | | |
| | 009930 | \$3,829.87 | \$7,864.45 | \$2,147.51 | \$13,841.83 | Bucket 4- | -5 | | | | | | |
| | 10128 | \$13,795.18 | \$0.00 | \$0.00 | \$13,795.18 | 1000 | | | | | | | |
| | 11051 | \$13,058.35 | \$1,190.25 | \$0.00 | \$11,976.56 | | | | | | | | |
| | 11672 | \$868.45 | \$7,750.23 | \$0.00 | \$8,618.68 | 11. | 54 | | | | | | |
| | 11212 | \$123.39 | \$0.00 | \$8,226.07 | \$8,349.46 | 0 | 300k | | | | | | |
| | 003844 | \$7,862.29 | \$0.00 | \$0.00 | \$7,862.29 | Ľ | JUON | | | | | | |
| | 004296 | \$7,574.85 | \$199.33 | \$0.00 | \$7,774.18 | | | | | | | | |
| | 000605 | \$108.38 | \$1,470.95 | \$6,151.96 | \$7,731.29 | Net Due | | | | | | | |
| | 001322 | \$6,900.41 | \$123.29 | \$0.00 | \$7,023.70 | | | | | | | | |
| | 002213 | \$170.66 | \$4,900.08 | \$1,477.96 | \$6,904.80 | | | | | | | | |
| | 004094 | \$87.32 | \$87.32 | \$6,301.02 | \$6,475.66 | | | | | | | | |
| | 000104 | \$4,071,81 | \$1,853.14 | \$0.00 | \$5,924.95 | 1.02 | | | | | | | |
| | 009181 | \$5,735.94 | \$519.23 | \$0.00 | \$5,899.74 | 0 | 1M | | | | | | |
| | 006783 | \$5,665.34 | \$0.00 | \$0.00 | \$5,665.34 | | 4 | | | | | | |
| | 010221 | \$5,626.50 | \$0.00 | \$0.00 | \$5,626.50 | | | | | | | | |
| | 005374 | \$3,616.77 | \$1,731.34 | \$45.12 | \$5,393.23 | | | | | | | | |
| | 12210 | \$4,923.02 | \$0.00 | \$0.00 | \$4,923.02 | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | 1 |

- Report Exports as Printable PDF
- Setup Page Settings including Page Size and Orientation
- Multi Page Support



Bookmark Organizer – Scheduler

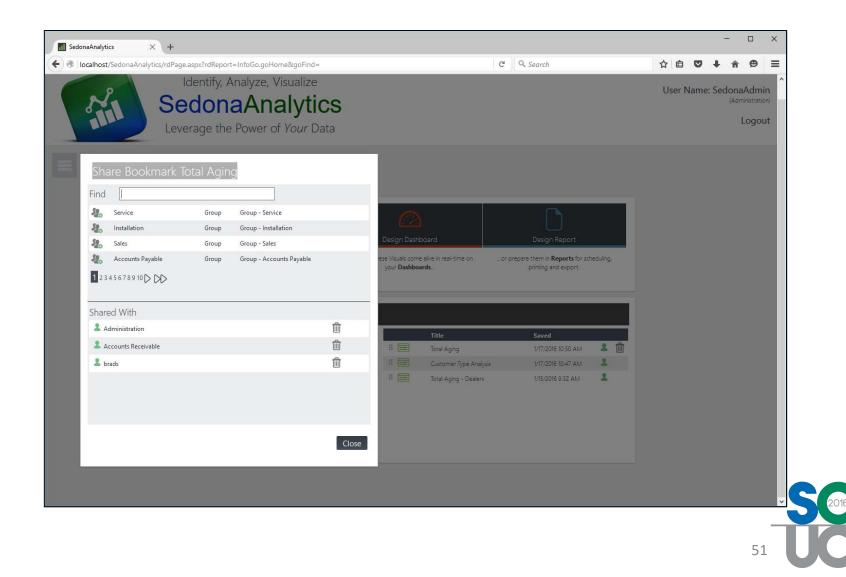


Bookmark Organizer – Scheduler

- Schedule Automatic Distribution of Reports via Email as an Attachment
- Configure Send and Recipient Info
- Configure Email Subject and Body.
- Flexible Frequency Based Scheduler



Bookmark Organizer – Sharing



Bookmark Organizer – Sharing

- Share Items with Other
 SedonaOffice Users or Entire
 Departments
- Analysis Pages
- Dashboards
- Reports



Questions ?





SedonaAnalytics

Presented By: Brad Swindell

OPT Business Services, Inc.

