

#### **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.

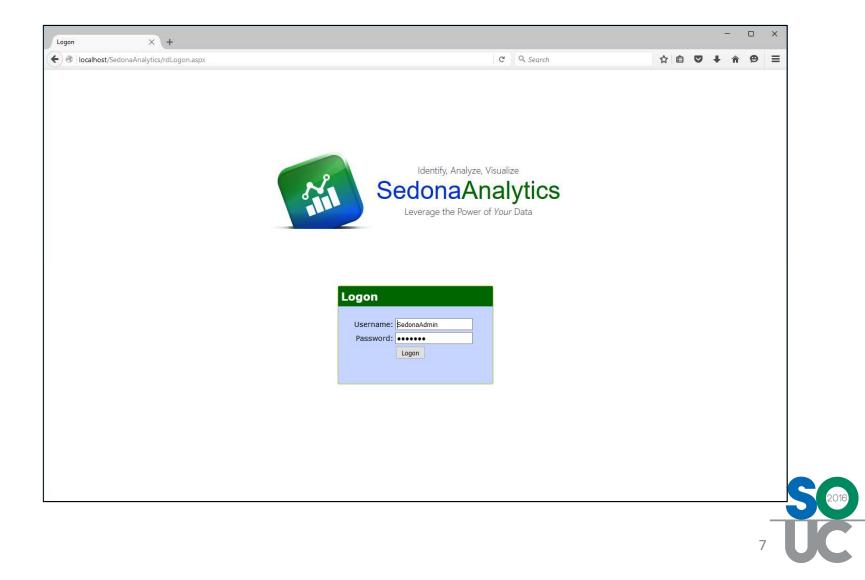
# And the Best Part?

#### 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**

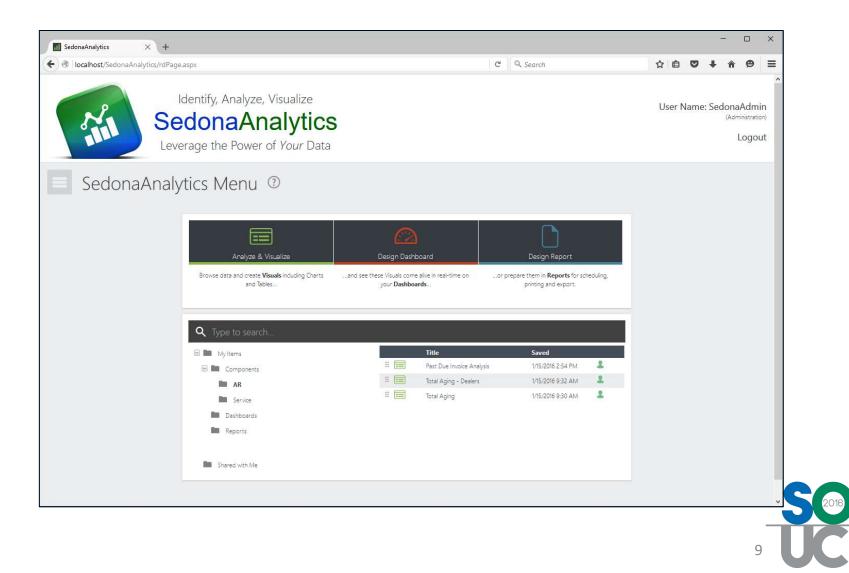


# **Login Methods**

- Login via SedonaOffice
- Login via Portal Directly



#### Home Page – Key Components

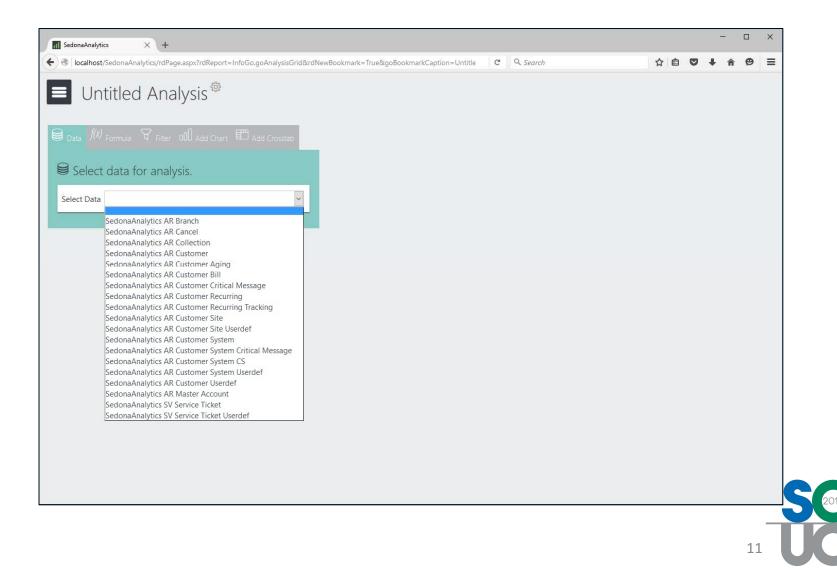


#### Home Page – Key Components

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



# **Create Analysis Components**

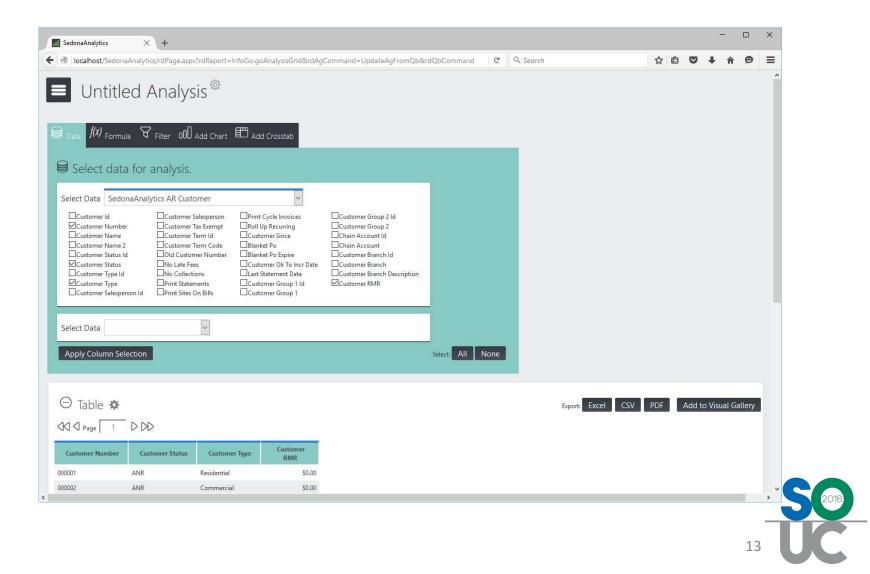


# **Create Analysis Components**

- 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**

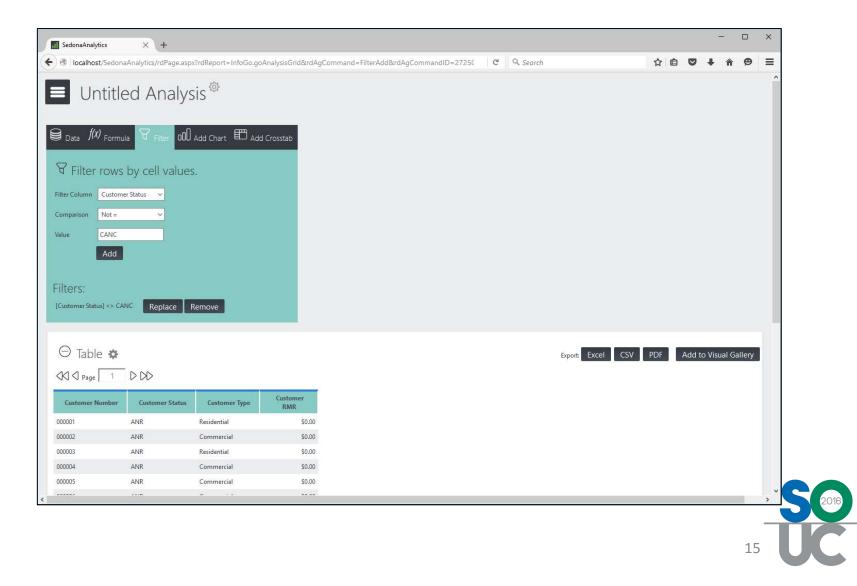


#### **Analysis - Data**

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



#### **Analysis - Filters**

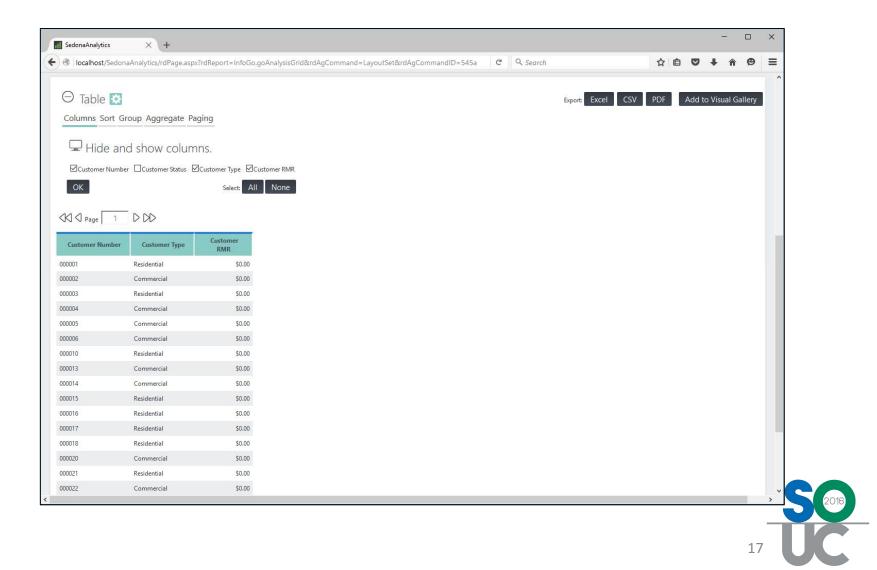


# **Analysis - Filters**

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



# Analysis – Grid Columns

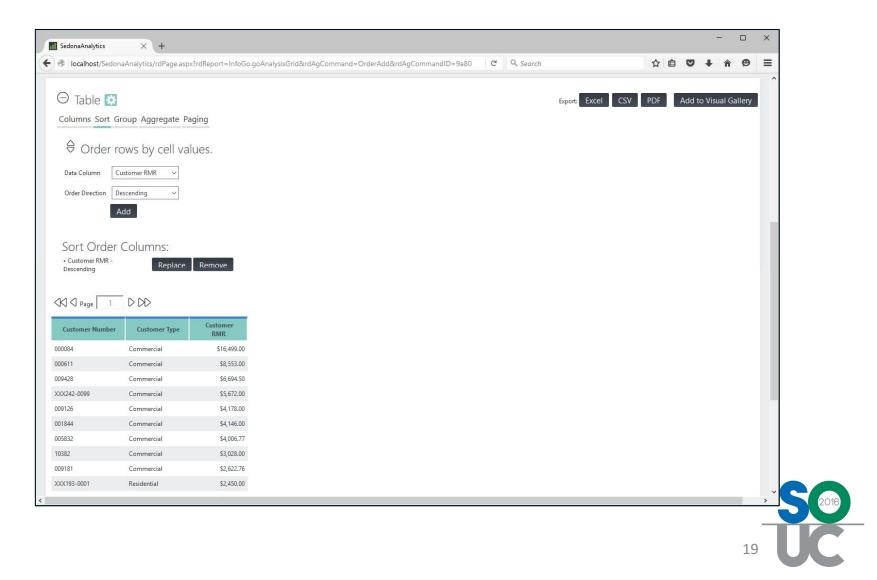


# Analysis – Grid Columns

- 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**

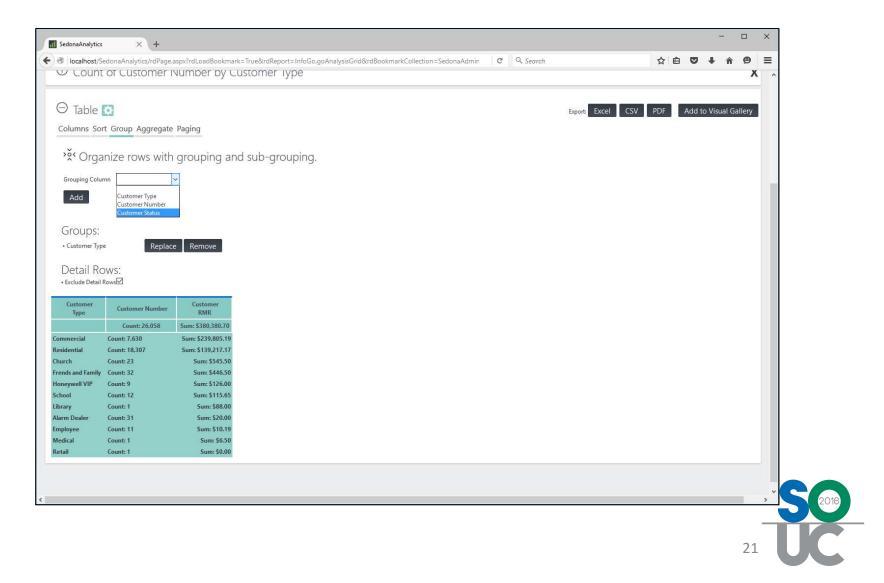


# **Analysis – Sorting**

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



# **Analysis – Grouping**

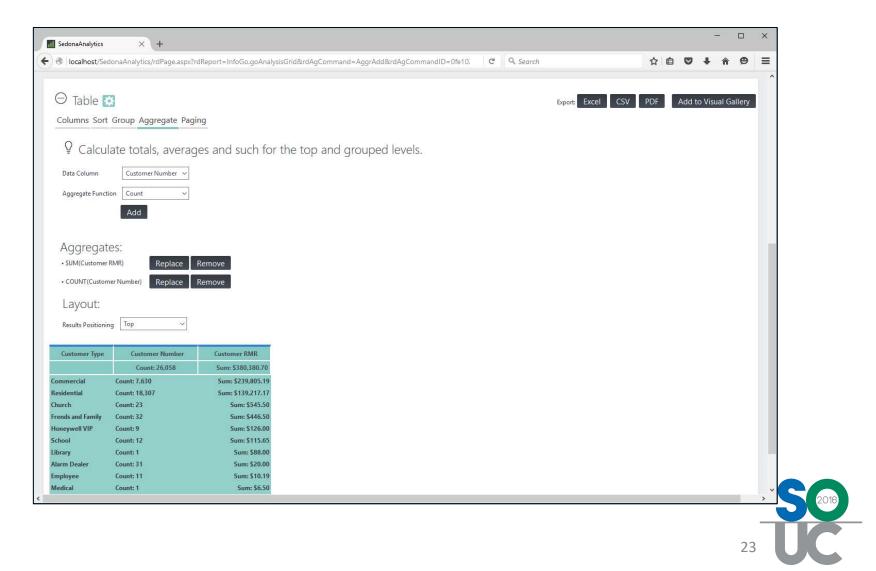


# **Analysis – Grouping**

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



# **Analysis – Aggregation**

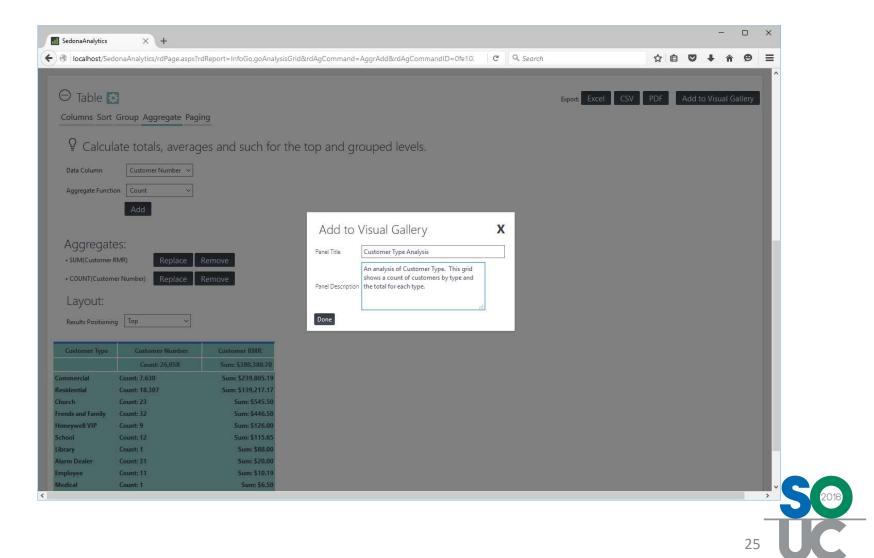


# **Analysis – Aggregation**

- 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

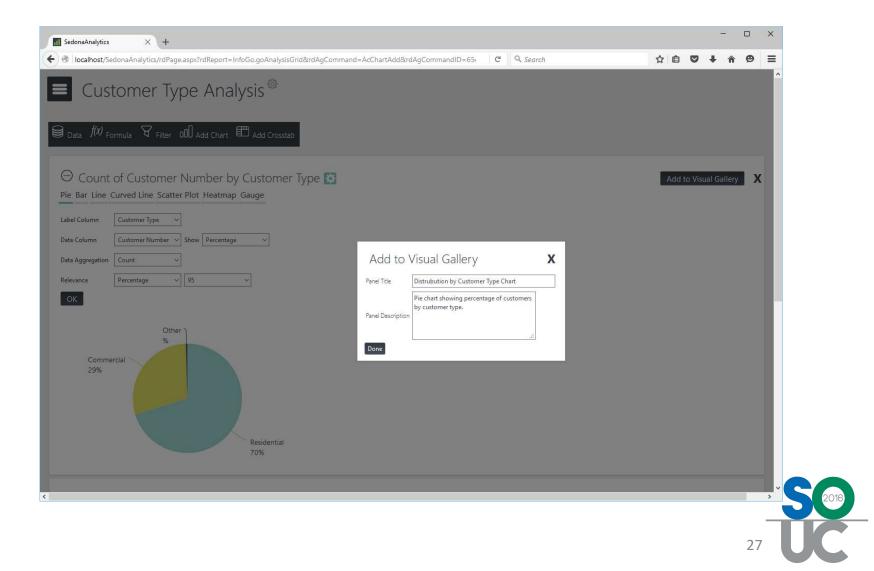


#### Analysis – Add to Visual Gallery

- 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**

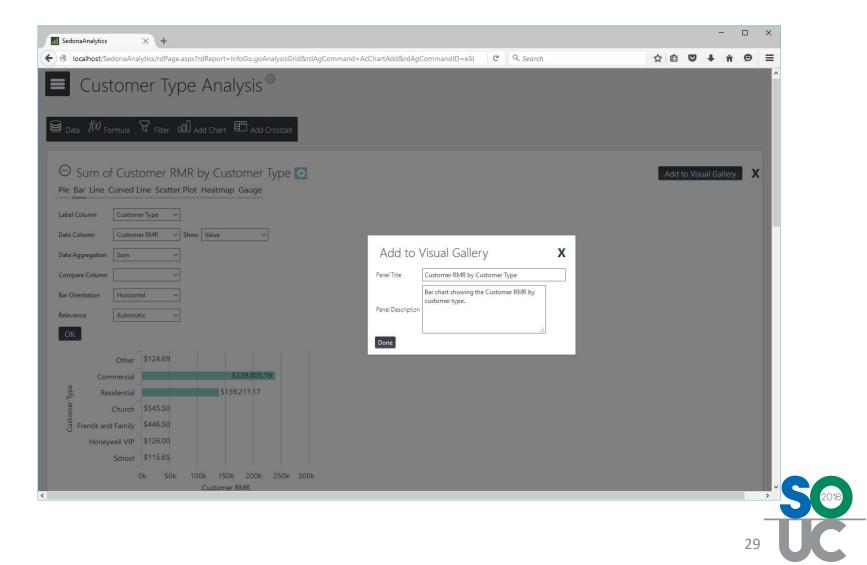


# **Analysis – Pie Chart**

- 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

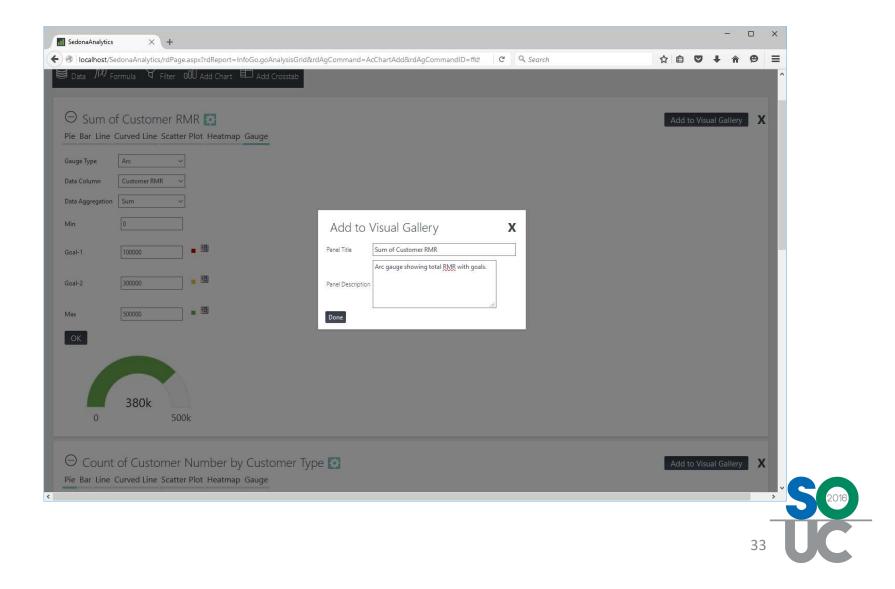
- Add Additional Charts for Different Visualizations of the Data to Gain Different Insights.
- Compare Columns: Additional Groups
- Add the Bar Chart to the Visual Gallery



📶 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		
$\Theta$ 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

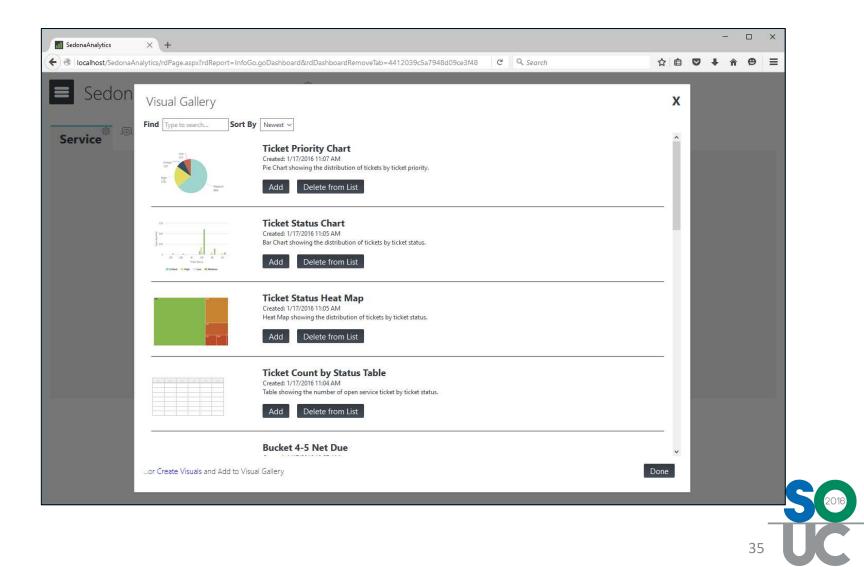




- Additional Gauge Types Include:
  - Arc (Shown)
  - Balloon Bar (Previous Slide)
  - Bullet Bar
- Additional Charts Include:
  - Line
  - Curved Line
  - Scattered Plot
  - Heatmap



# **Dashboards – Visual Gallery**

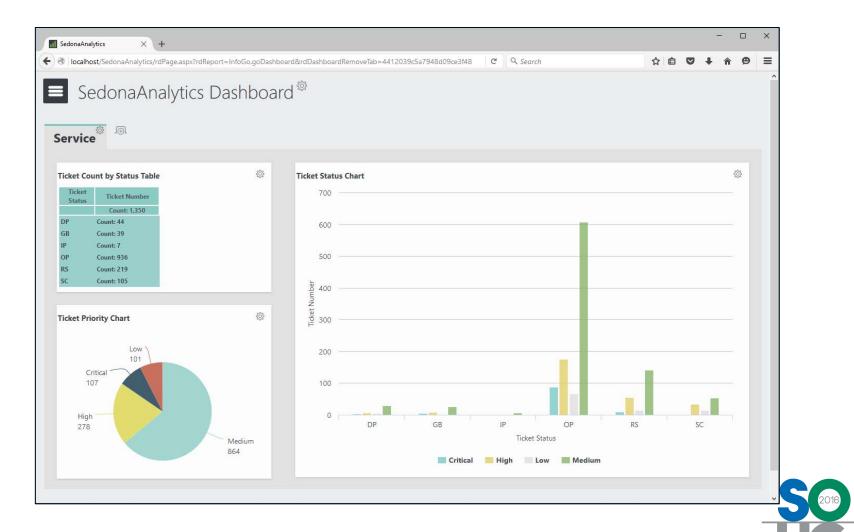


# **Dashboards – Visual Gallery**

- 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**



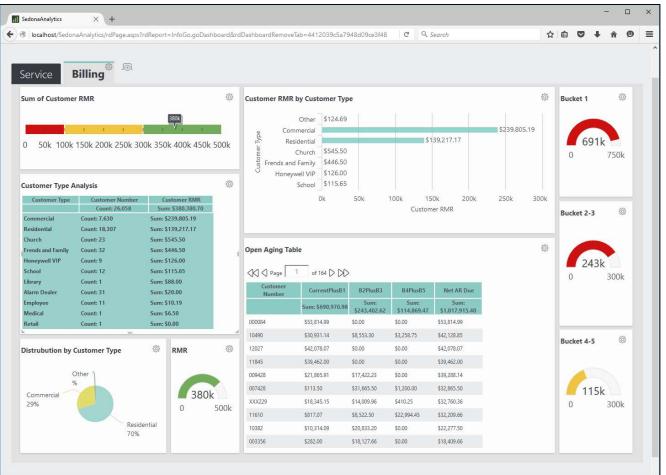
37

## **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**



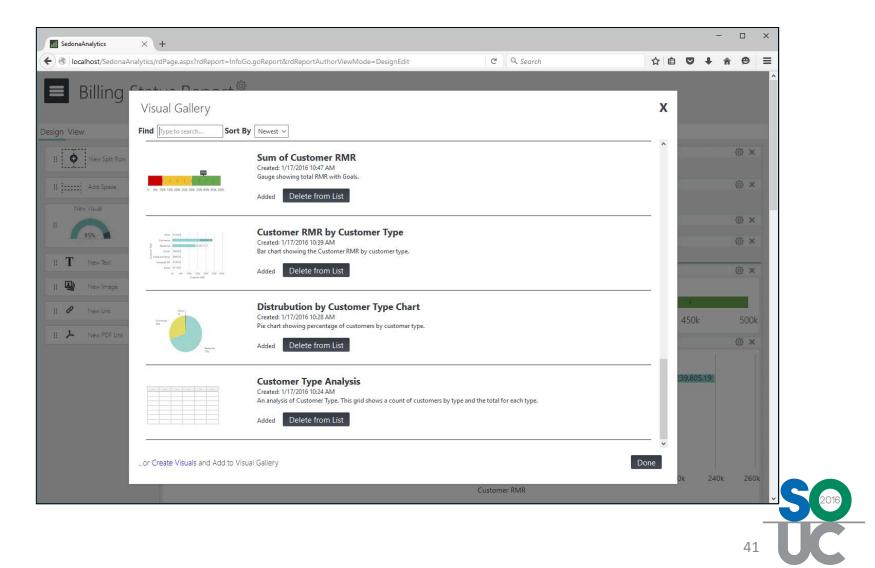


## **Dashboards – Tabs / Flex**

- 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**



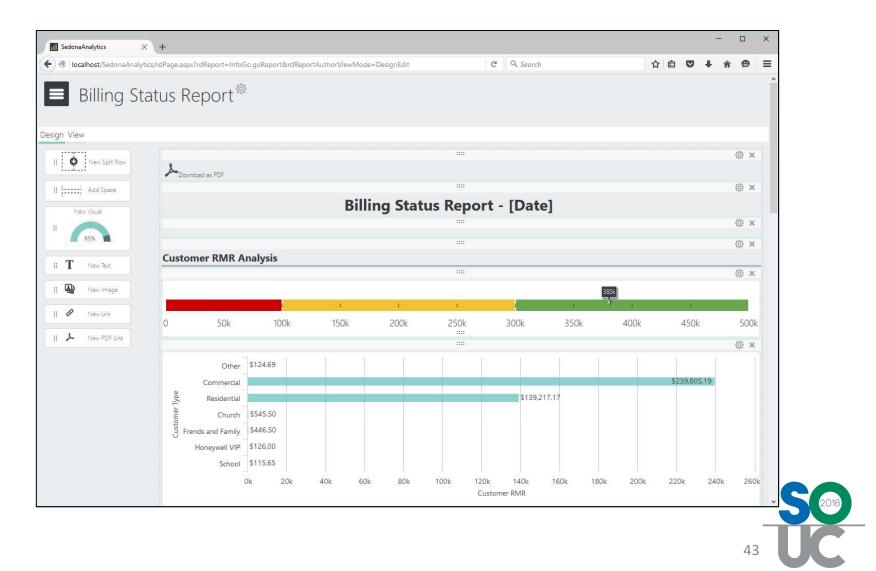
Oper

# **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**

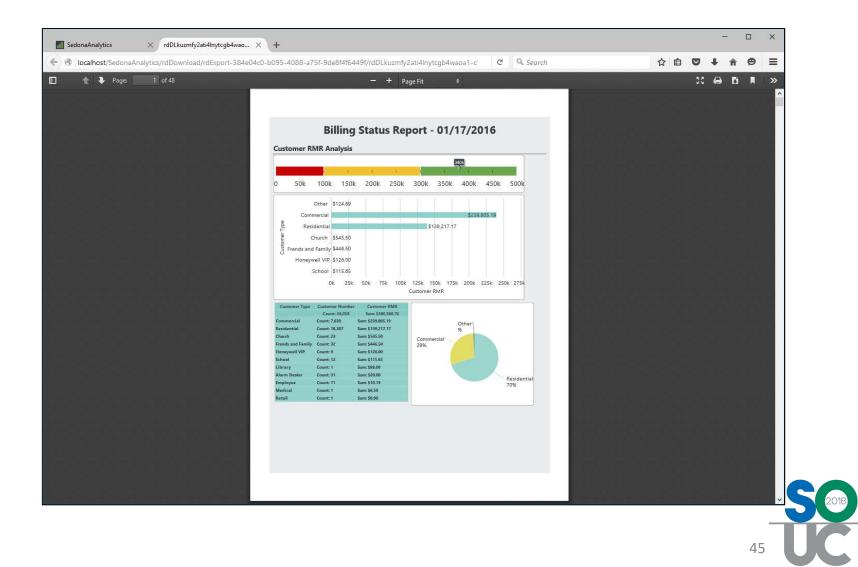


Oper

## **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





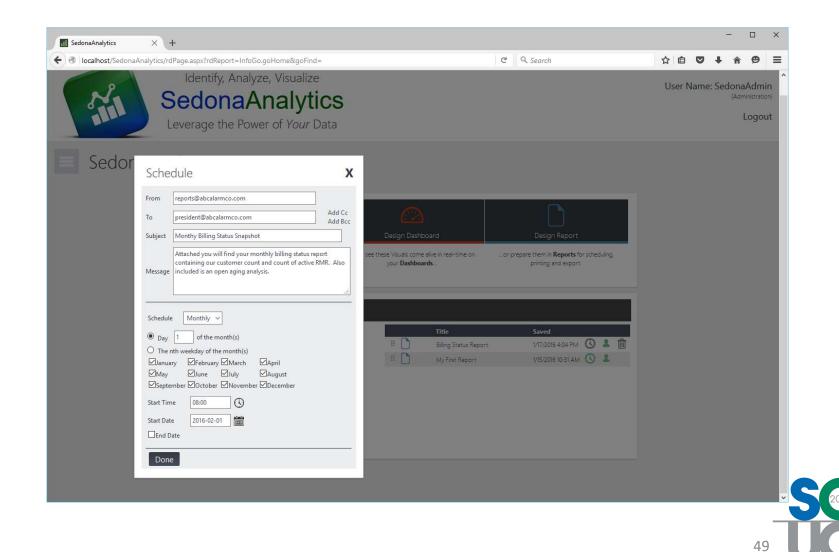


Page: 2 of 48	1			4e04c0-b095-4088-a75f-9de8f4f6449f/rdDLkuzmfy2ati4lnytcgb4waoa1-c C Q Search									
		- + Page Fit ÷									8	£ .	»
													^
	Open Aging	Analysis											
	Customer Number			B4PlusB5	Net AR Due	Bucket 1							
		Sum: \$690,970.98		Sum: \$114,869.43									
	000064	\$53,814.99 \$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**

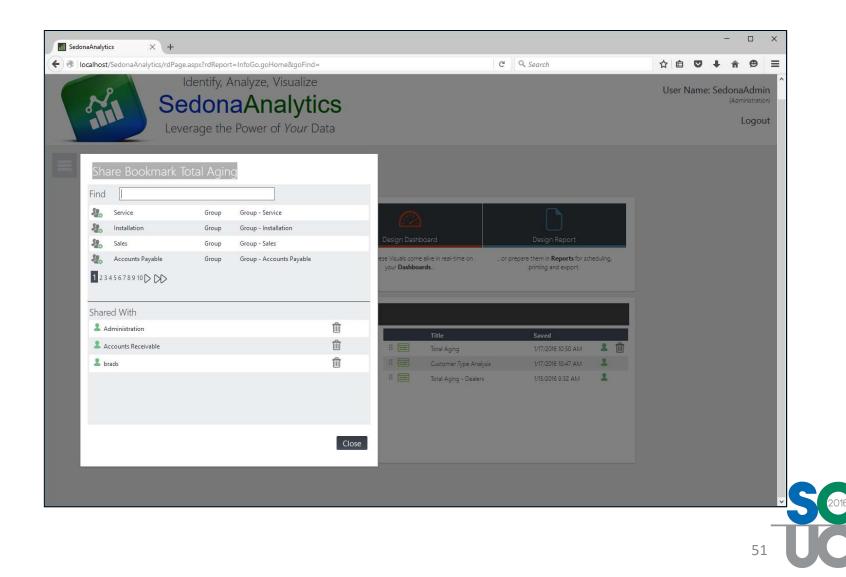


#### **Bookmark Organizer – Scheduler**

- 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.

