Set up your template server and share using templates
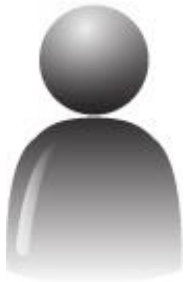
Understand the concept behind and set up your template server correctly before sharing you first analysis.

The concept

1. You build an analysis in

ABC Analyzer

2. You share the analysis using

Template
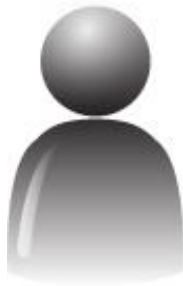
3. Your colleagues access the analysis in

ABC Viewer

Analysis X

The advantage:

You build an analysis in

ABC Analyzer

Your colleagues use the analysis in

ABC Viewer

Once → Over and over

How?

Using the template server

All your analyses will be accessible from the

Template Server
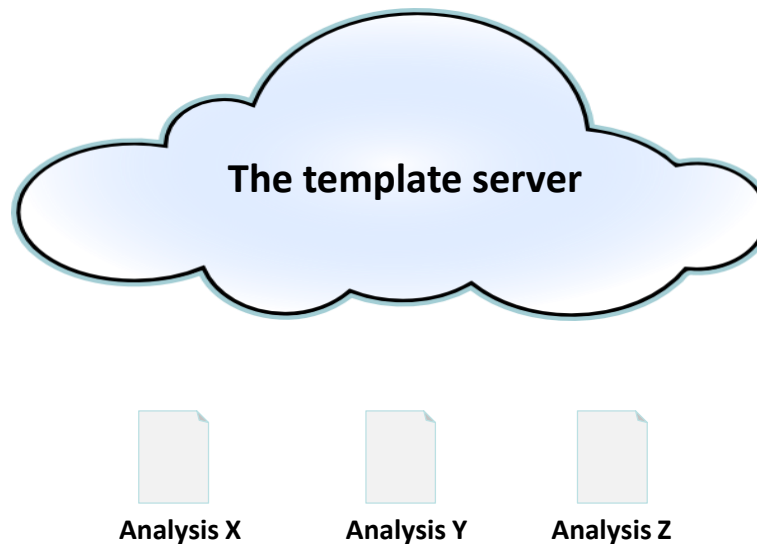
The template server

Analysis X   **Analysis Y**   **Analysis Z**

Share using the Template Server

You upload the analyses, your colleagues access them and load them with the newest data
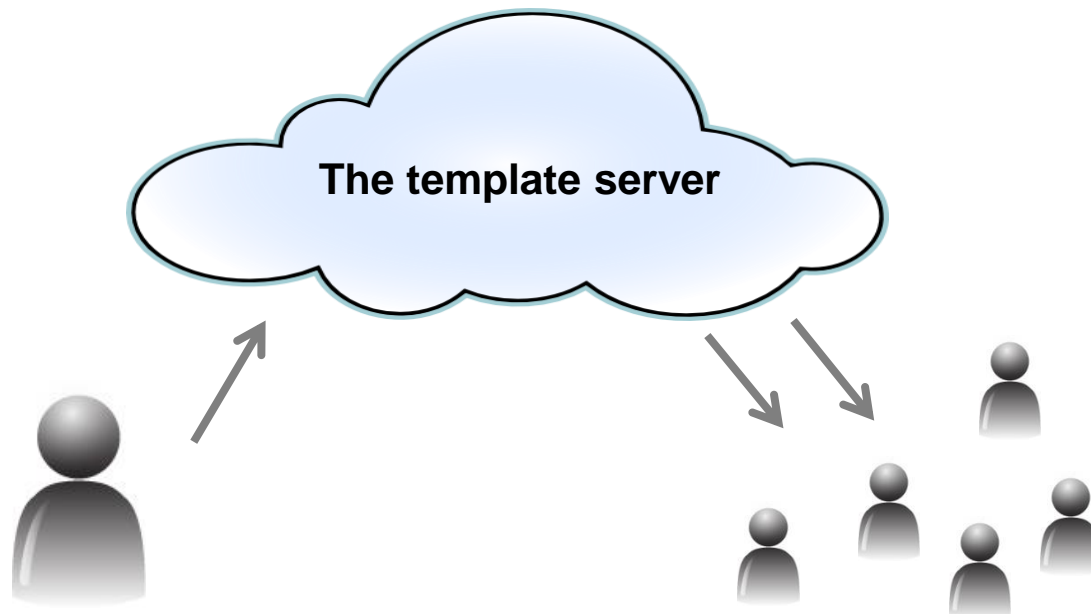
The template server

What is an template?

A template is your analysis:

Template

- All categorizations
- All reports
- All settings

… Actually everything except data. But you define where it should look for it!

Each time a template is opened,
it is automatically loaded with the newest data

Txt

New data   ✚   Template X   →   Updated analysis

Data

Data is safely located on your own server

Your IT department updates your data file each day, week, or month

A template automatically "remembers" which data file is was created by – and its location

Make sure the data file always is placed in the same folder
and with the same name.

Set up your template server

You only have to do this once!

Consideration

Consider: How should your templates be arranged?
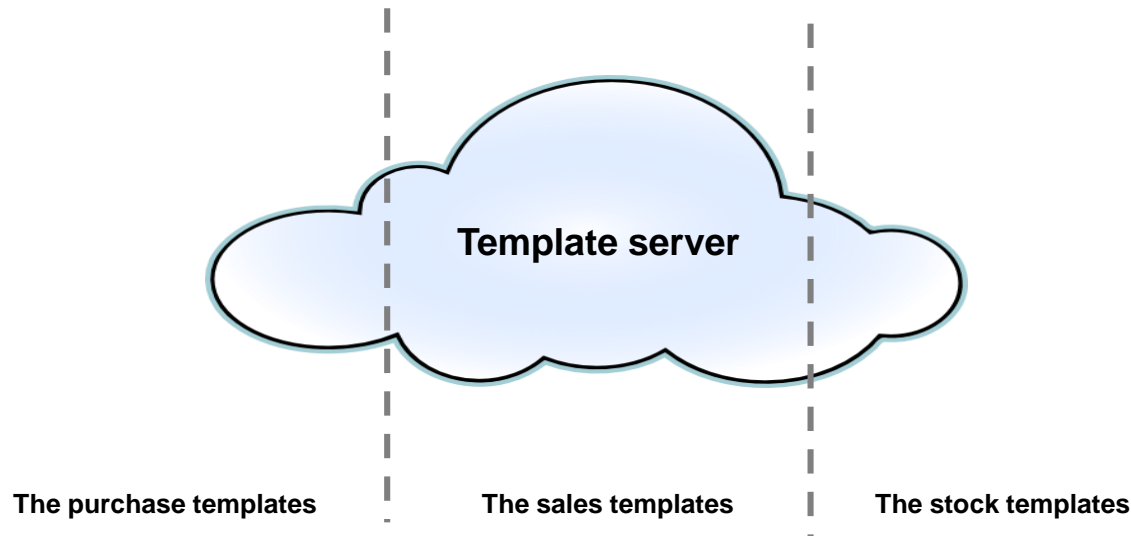
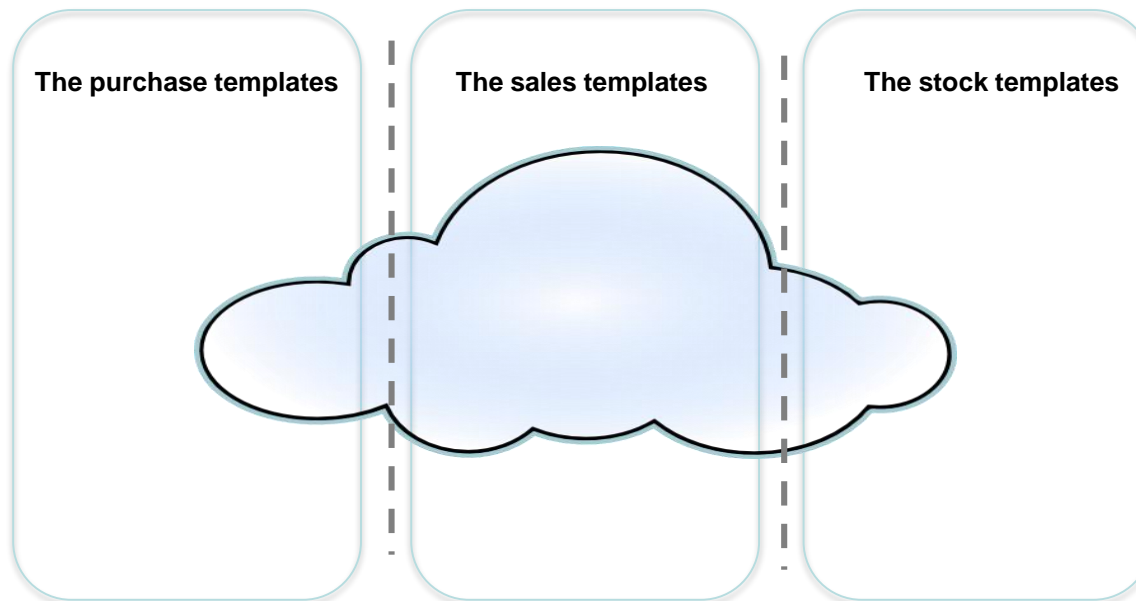**The purchase templates**   **The sales templates**   **The stock templates**

ABC Softwork will set up your template server

| The purchase templates | The sales templates | The stock templates |

Access your template server

Choose "Filer"/"Manage templates" in ABC Analyzer and "Open" in ABC Viewer

Each "group" of templates is displayed as a tab
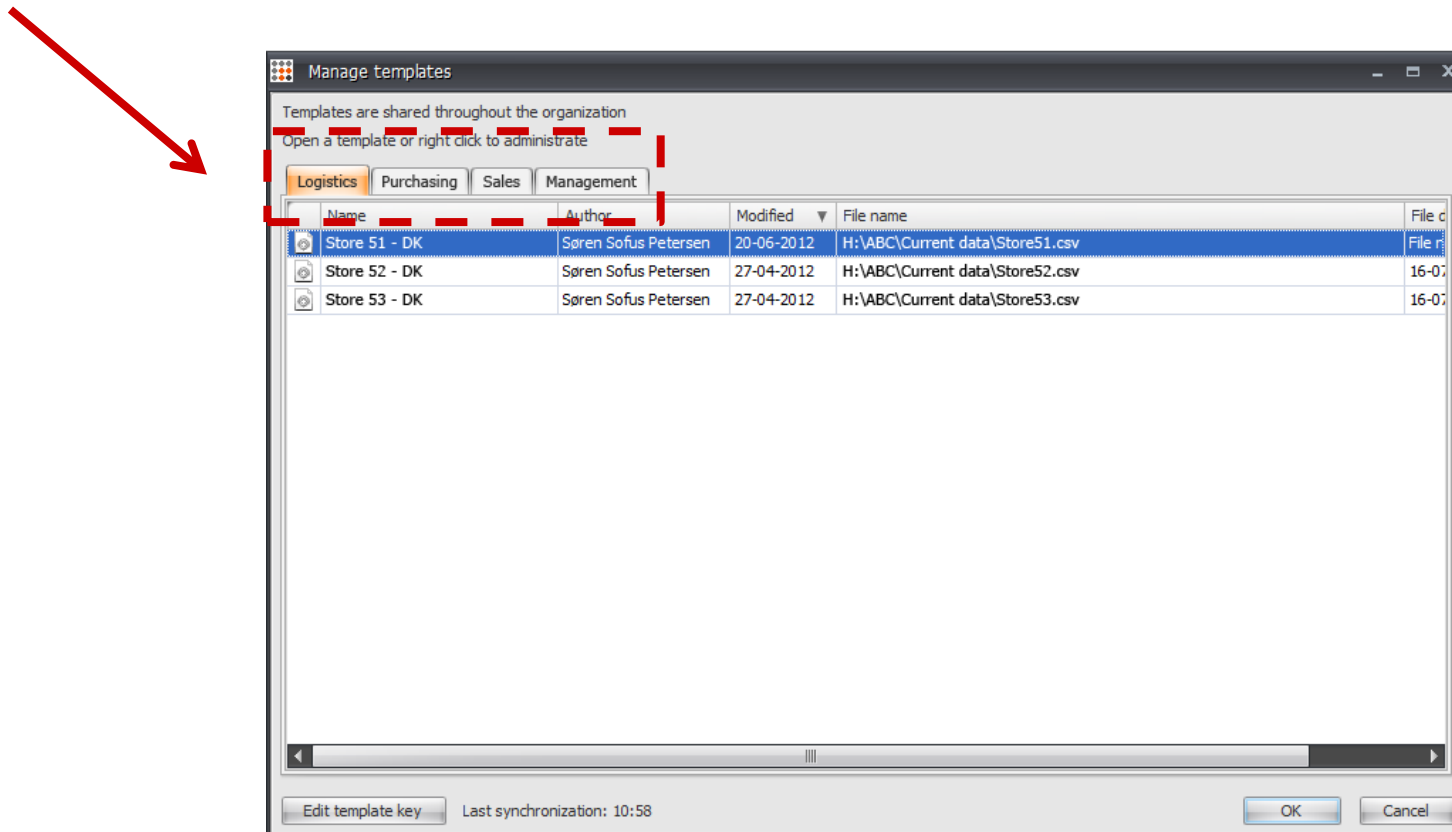
Manage templates

In ABC Analyzer: To edit, duplicate, delete, or move to another group:

Right-click the template
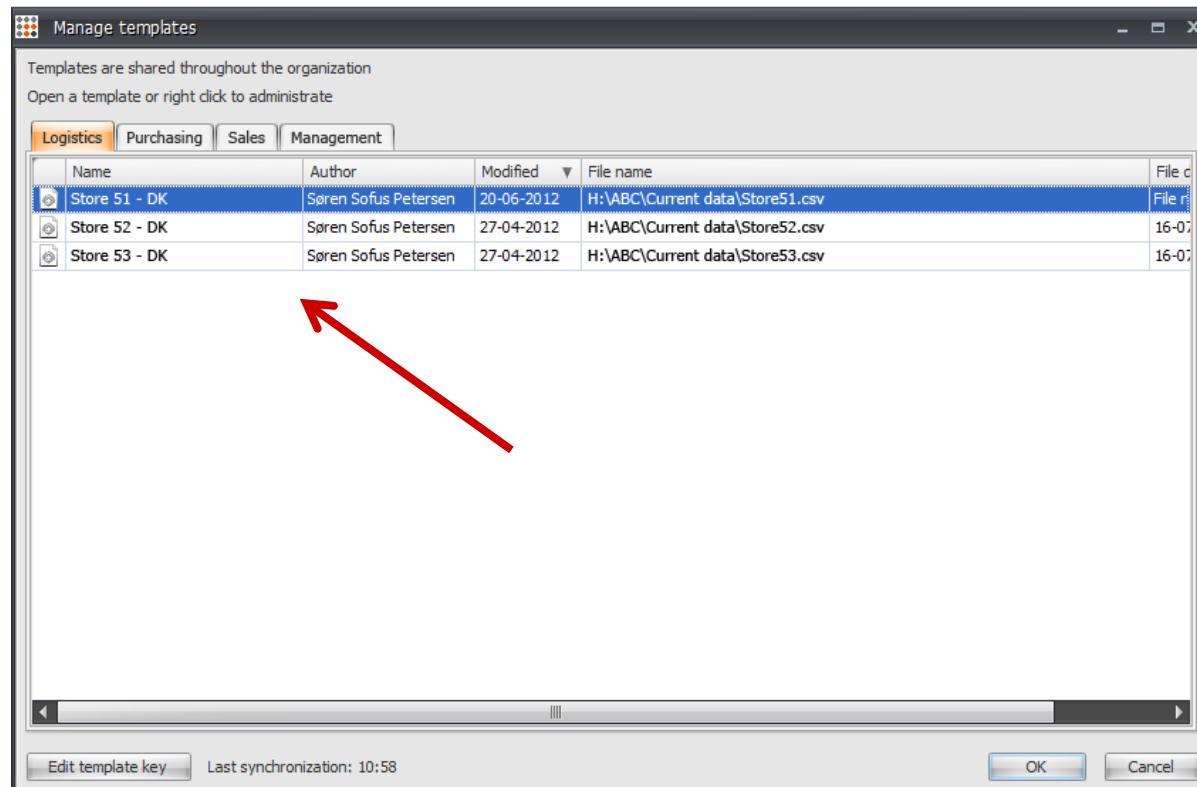
Access & safety

You receive two template keys – one for each program

ABC Analyzer
(Reading and writing access)

ABC Viewer
(Only reading access)

In ABC Analyzer you can change templates

You can create, edit, duplicate, or delete templates

In ABC Viewer you can *only* open templates

The ABC Viewer users can not change or destroy a template

Remember:

Explain your colleagues that templates *only* work when they have:
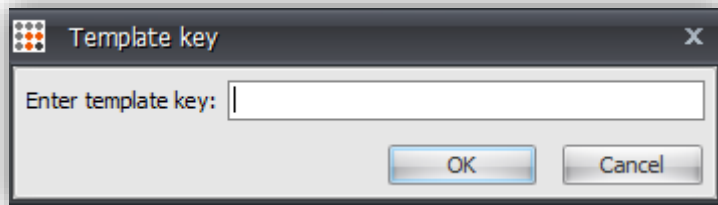
1. Access to templates (!)

You need a template key and an Internet connection to reach the template server.

(Once a template has been retrieved it is not necessary to be online)

2. Access to data

Templates do not contain data therefore the analysis can only be displayed if the user has access to the data.

If you want to work from home you will need to "take data home" or set up a VPN connection.

Save, edit or delete a template

Create a template in ABC Analyzer
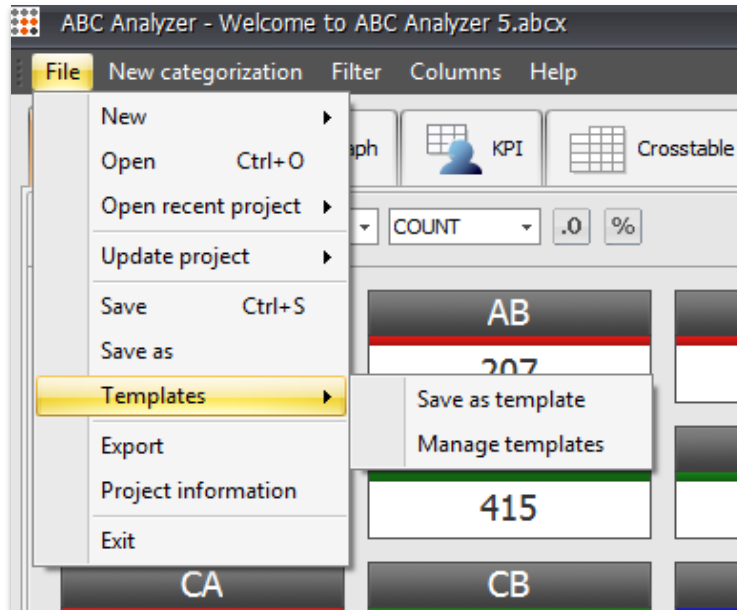
When you are satisfied with your analysis, save it as a template.

Your template is immediately available in ABC Viewer.

Save a template
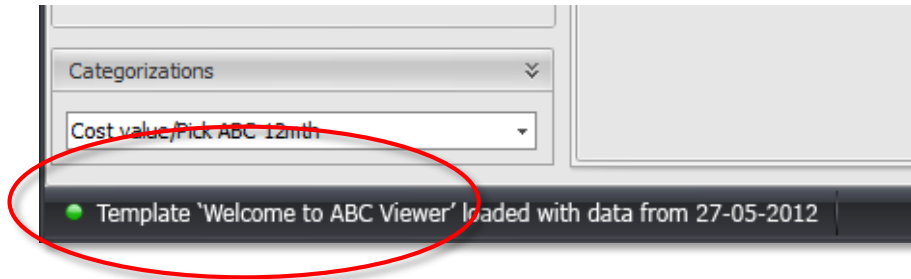
When you save a template, ABC Analyzer saves a "copy" of your project file, but **it is still your project file you see in ABC Analyzer.**

In the lower right corner you can see whether a template or a project file is loaded.

Overwrite/update a template
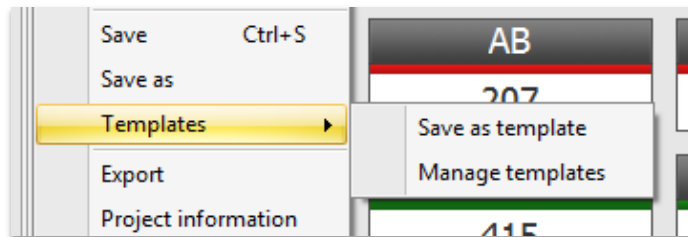
Always choose "Save as template" to overwrite/update a existing template.

(If you choose "Save", you will only save a project file locally on your computer.)

Delete, rename or move
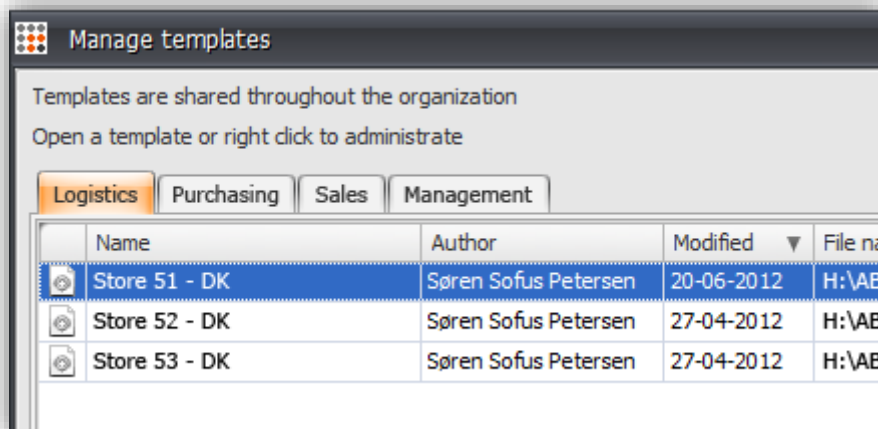
Right-click a template name to delete, rename, copy, or move a template.

Changes in your data

We recommend that you only make changes to your data file, if absolutely necessary.

Add new columns to your data file
- new columns ALWAYS have to be added in the end
of the data file

..so your templates can be updated to the new data file

Update your templates when the new data file is ready

If you do not update a template, so it fits the new data file,
both you and your colleagues will get an error message
in ABC Analyzer and ABC Viewer.

# Update the template to a new data file

1. Open the template you want to update with an "old" data file for example last week's data file.

2. Choose "Current project/Update project"/"Edit data setup".

3. Choose the new data file.

4. The importer starts, and you have to define the new data columns' type of data (ID, number, text etc.).

5. Save the changes in your template.

6. Now the Viewer users can see the updated template!
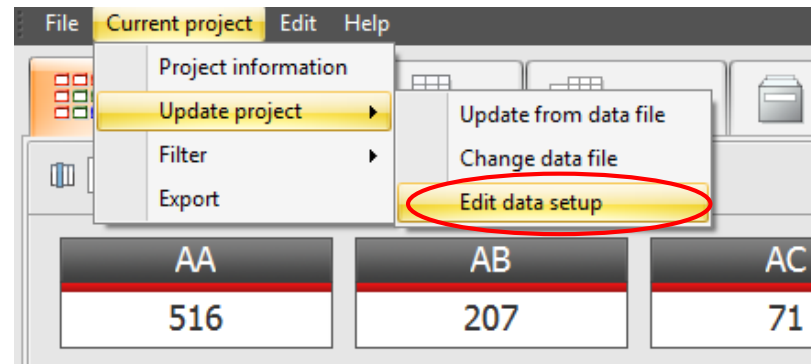
Before you hand over template keys to your colleagues..

Test that your setup works and supports your needs

- ✅ **Set up** your **template server** and define groupings and rights

- ✅ Check with your IT department that the **update of data** works

- ✅ **Set up good templates** and save them on your template server

Check list for communicative errors(!)

1. Put yourself in the user's place

Reports and dataslicers are the two most important elements for an ABC Viewer user.

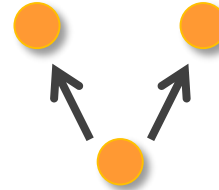**Consider:** Which reports and dataslicers support the purchasers tasks the best?

2. Eliminate noise and misunder-standings

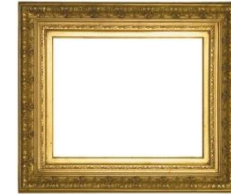Remove all unnecessary columns in the reports and lock the most important ones. Often 10 or less are enough.

Set up the appropriate dataslicers.

Rename columns, reports and categorizations if they are misleading or difficult to understand.

3. Test & Share

It is important that the analysis is self-explanatory. Test it on a colleague before sharing.

4. Create a good framework

Success depends on whether the Viewer user perceives ABC Viewer as a useful tool.

Spend time educating the ABC Viewer users, and ask continuously for feedback to ensure that your templates fit their everyday challenges ☺

Find more hints about how to build succesful analyses

In our tutorial: "Set up kick-ass analyses for ABC Viewer"