

Work effectively with dataslicers and reports

You'll learn how to:

- Work effectively with dataslicers
- Combine dataslicers and reports
- Create a new report
- Create a "Top 10" report
- Create special reports: delta and movement reports



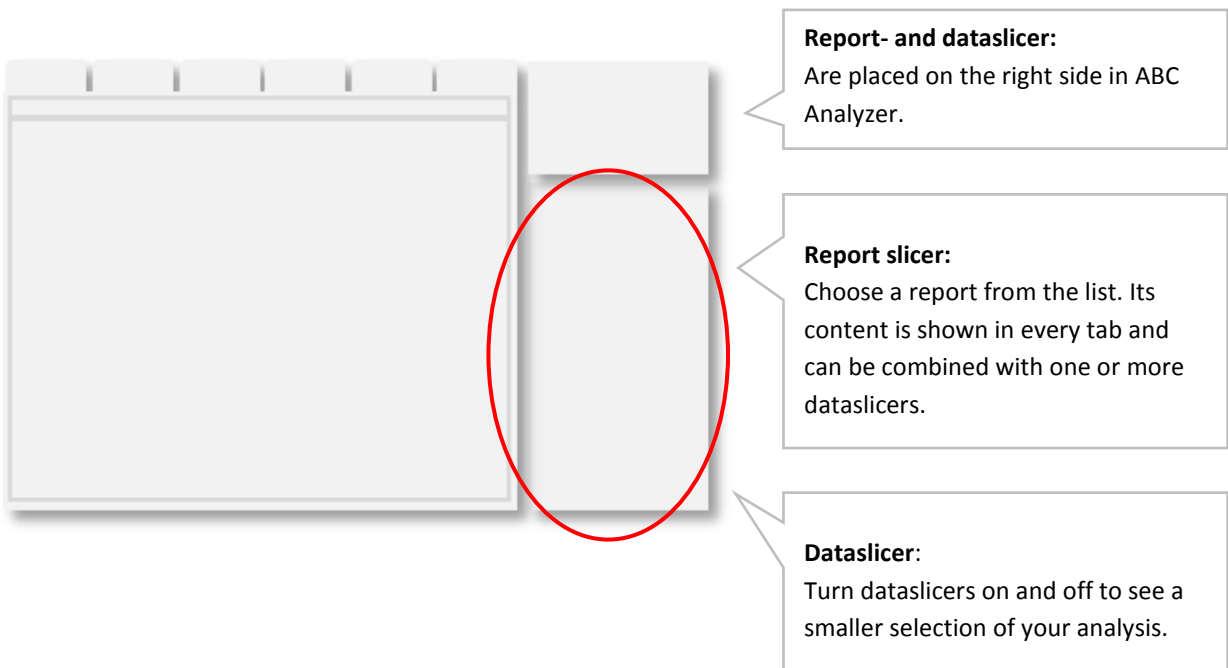
Manual updated October 2015

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Reports and dataslicers

Reports and dataslicers are two of your most important functions in ABC Analyzer. Learn how to work effectively with dataslicers, set up reports and “Top 10” reports which both you and your colleagues can use over and over again.



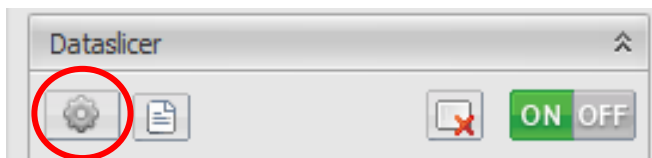
Dataslicers

What is dataslicers?

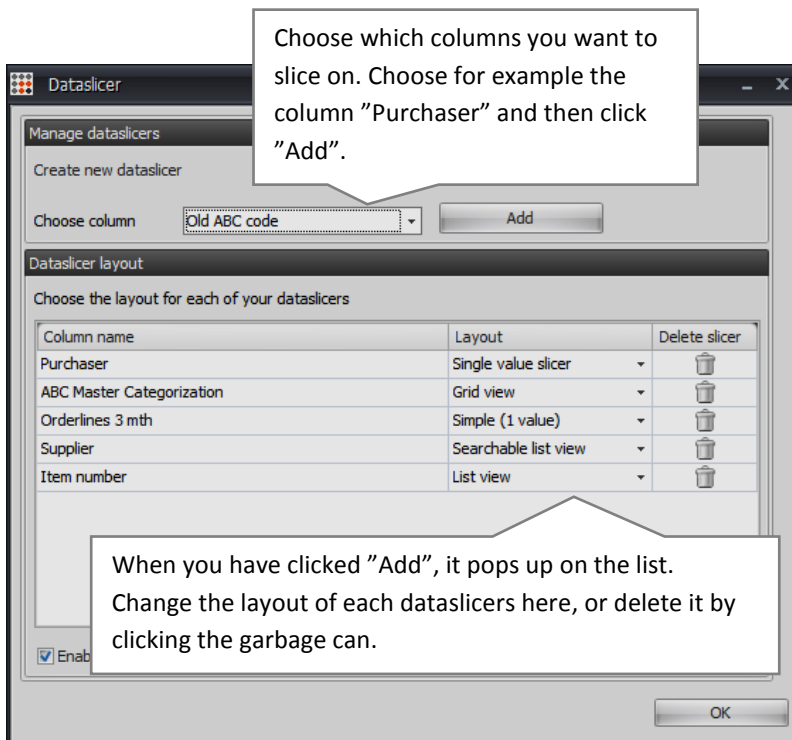
Dataslicers allow you to dive quickly and efficiently into data and to see a smaller selection of your analysis. For example choose only to see items from a certain purchaser or from one or more suppliers. You can combine several dataslicers when you are working on your analyses.

Set up dataslicers

Click the cogwheel in the right side control of ABC Analyzer



Then this window turns up:



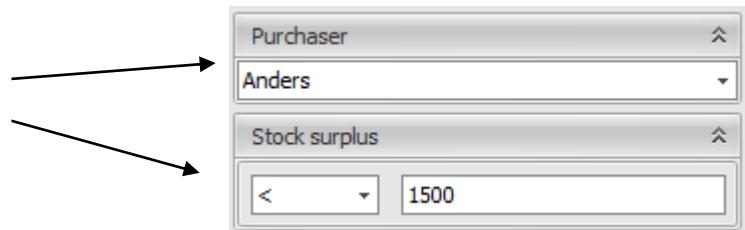
You can delete, edit, or add slicers using the cogwheel, anytime.

Use dataslicers

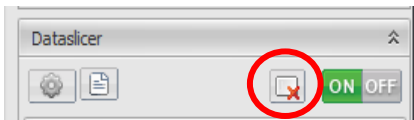
When you turn on a dataslicer you will see the chosen selection in the different tabs, except Reports. If you have set up a slicer on the column "Purchaser" and chosen "Anders", then you only will see his items in Overview, KPI etc.

Combine several dataslicers: For each dataslicer you turn on, the selection is narrowed. Meaning: If you are slicing on both "Purchaser" and the column "Stock surplus", you will only see items for which:

- Anders is responsible
- The stock surplus is greater than (>) 1500 EURO.



Shortcut to delete/clear dataslicer(s)



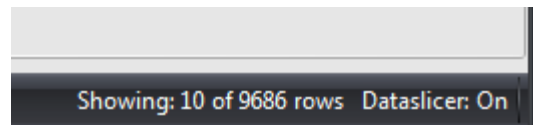
Click "Clear all dataslicers" (the bottom with a red cross) to remove all markings, but keep the slicers. Right click a slicer to delete it, to clear its markings or to mark all values.

- See "all values except one": Mark all values using a right click and remove afterward the one which you do not want to see.

Dataslicers on/off

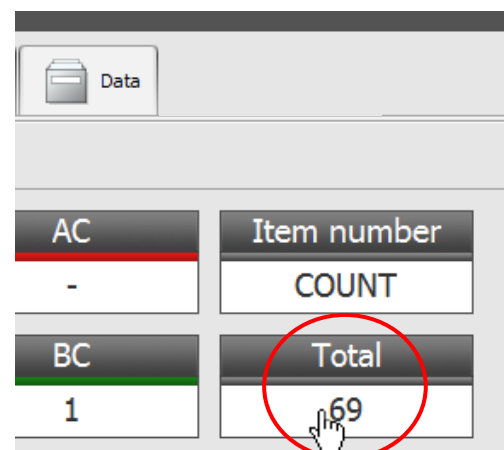
At the bottom in the right corner, you can always see how many items that are left "after slicing".

You turn dataslicers "OFF" using the button in the right side controls. If dataslicers are "Off", you will see all data.



Save the current slicing as a report

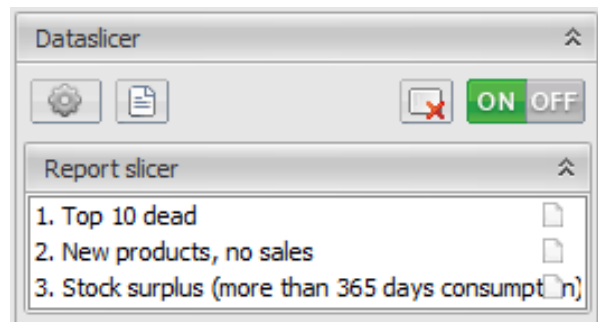
When you have sliced your data and reached a point where you want to save the current selection as a report, open it as a click report – using Overview or KPI (click on the Total box) - and then click "Save".



Reports

All reports are shown in the right side of the program below "Report slicer".

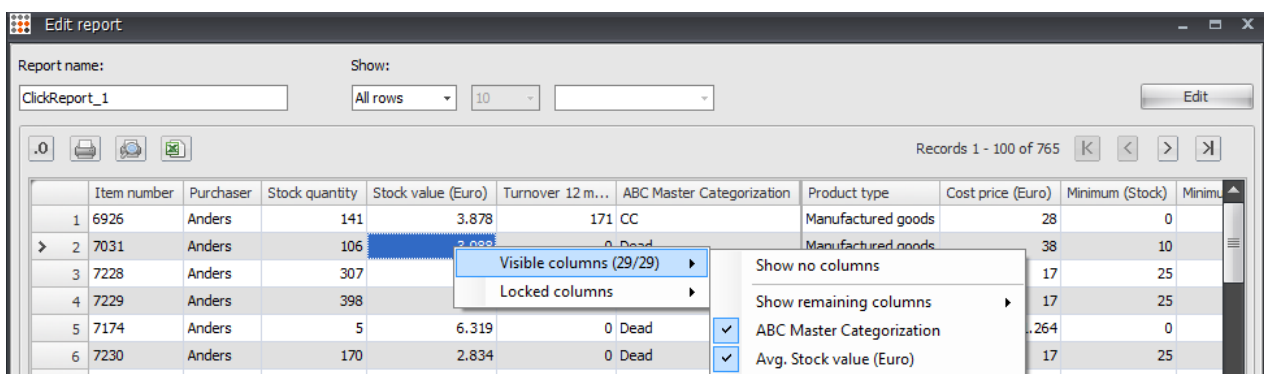
Each time you update data, your reports automatically update. So, if you have saved a report e.g. "AA items out of stock", you'll see an updated list with all AA products out of stock next time you update.



Set up and save a report

Set up a report:

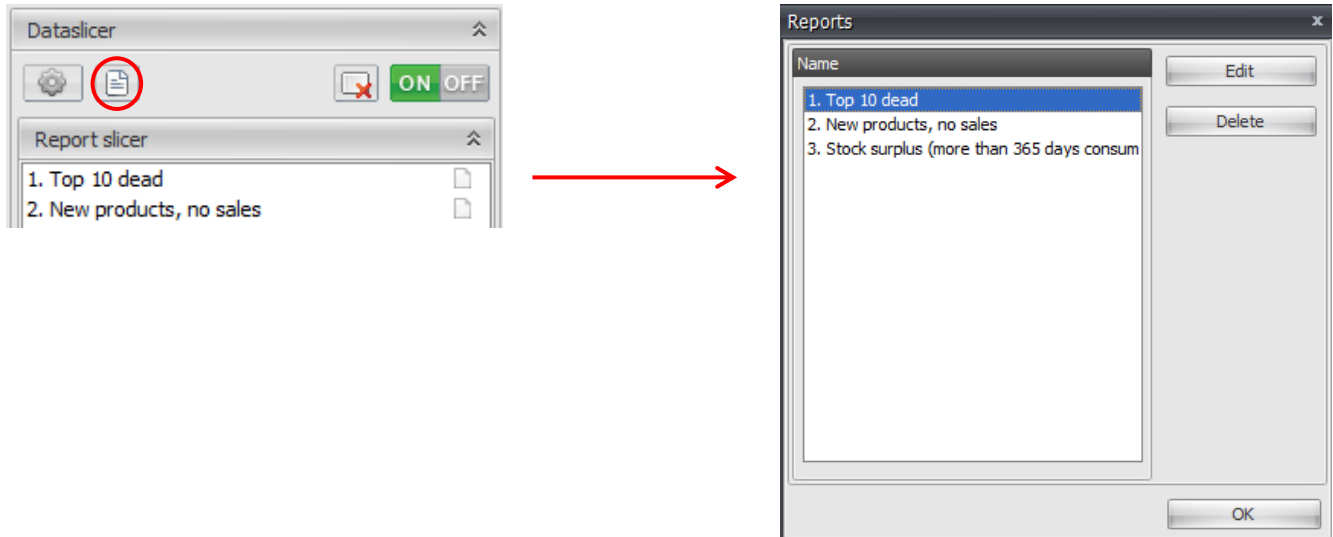
1. Open a click report.
2. Name the report.
3. Consider which columns you need in this report. Often less than 10 are appropriate.
4. Right-click inside the grid or use the cogwheel (see the screenshot below) to hide or lock columns.
A hint: Start by hiding all the columns and choose then which columns you want to see. The columns appear in the order they have been chosen.
5. Pull at the columns' headings to change the order.
6. Click "Save".



Edit a report

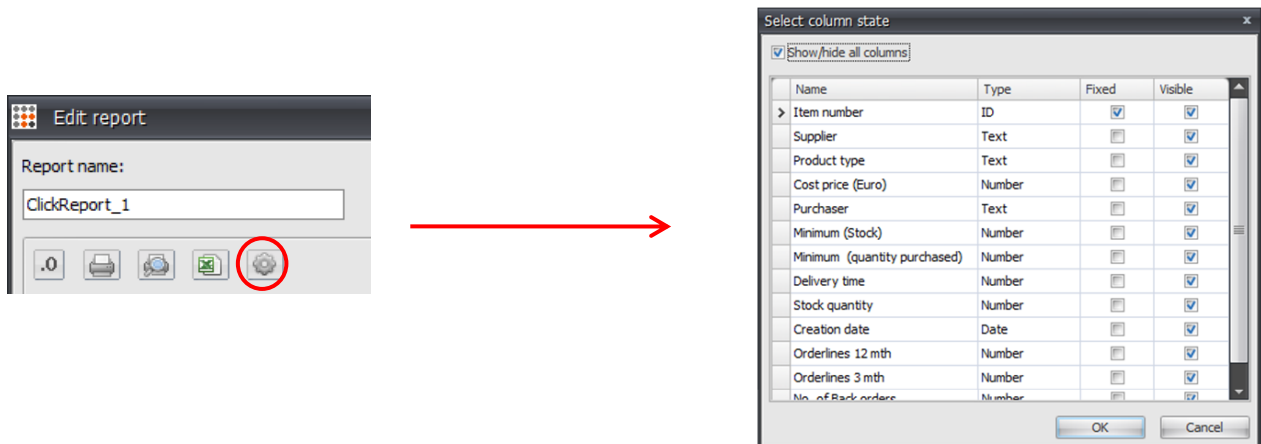
Edit a report by clicking the report icon on the left. (See Screenshot)

Do you wish to change the shown order of the reports you can add a number between 1 to 9, e.g.: "1. Top 10 dead", "2. Back orders", etc. If you wish to change the order later on, you only have to change the numbering of the reports.



Get an overview of your columns

Click the cogwheel at the top to see all your columns in a new pop-up window. Use checkmarks to control which columns that should/should not be locked and/or visible.



Combine reports and dataslicers

When you build your analyses, it is tempting to create a wide range of reports. Instead, you need to consider whether you can settle for a fewer number of reports and combine those with one or more dataslicers.

Here is an example of three reports and six dataslicers which you can benefit from combining:

Reports

- AA-items on back order
- Top 10 Dead items
- New items, no sale

Dataslicers with text

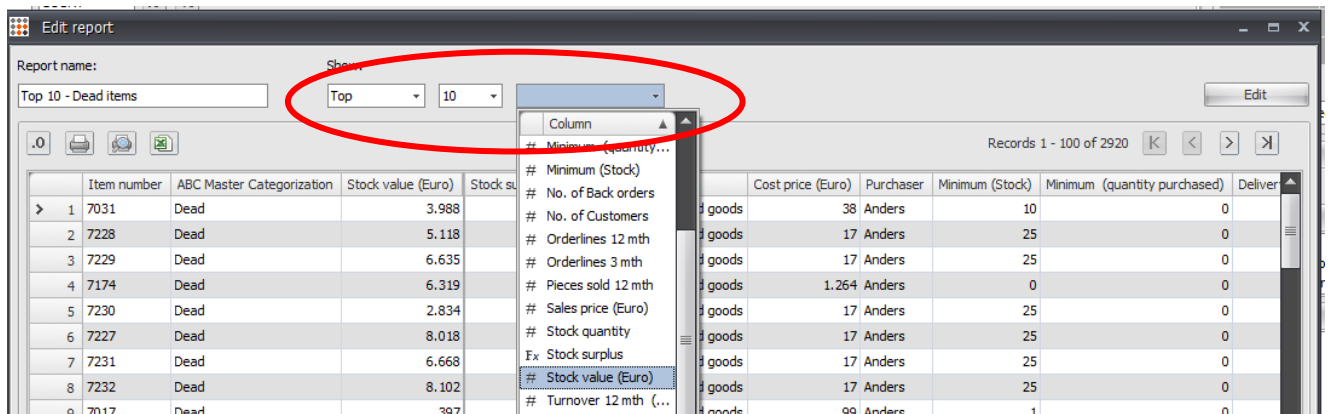
- Purchaser
- Supplier
- Product type

Dataslicers with numbers

- Turnover
- Stock surplus
- Number of back order

Top 10 reports

The "Top 10" function allows you to choose only to save the 10 most important items in a click report. Use the function when you want to build short easy-to-act-on lists, for example a list of dead products which have to be acted on.



In the click report window choose "Top" and then the column for which you want to make the "Top 10" list. E.g. choose "stock value" if you are making a top 10 of dead products. Immediately you will see the 10 items with the largest stock value below.

Top 10 reports always contain 10 item numbers

Combine a "Top 10" report with other dataslicers, you will notice that the list always contains 10 items. E.g. if you select a "Top 10 Dead items" and slice on a purchaser, you will always see "Top 10 dead for purchaser X".

Static reports

Save a report based on the ID number of the product instead of mathematic criteria. Use the new static report feature to track campaign periods, increased sales or phase out.

Why use static reports!

Sometimes, the only thing that defines a report is the product numbers it contains. If you convert a normal report into a static report, it will always contain the chosen product numbers – and nothing else.

Static reports help to monitor and track specific item numbers (ID)

- New products without sales, which have had extra marketing/campaign time.
- Dead products – where there have been an attempt to cut into the stock value.

In both cases, we are dealing with products, which at some point in time have lived up to mathematical criteria, e.g. a top 10 dead products. But since the initiatives, taken in the sales/marketing department works, the products are no longer among the "mathematical top 10"!

How to make a static report

Open a click report.

Report name: ClickReport_1 Show: Top 10 Lagerværdi Edit

Records 1 - 10 of

	Varenummer	Lagerværdi	Leverandør	Varetype	Kostpris	Disponent	Minimum	Mindste køb	Leveringstid	E
>	1	66	56.182	1173	Vare	113 Anders	500	300	60	
	2	16067	43.040	427	Stykliste	861 Anders	1	0	0	
	3	7800	26.414	1000	Stykliste	116 Anders	15	0	0	
	4	7063	25.048	864	Vare	1.933 Anders	7	0	30	
	5	16057	23.105	998	Stykliste	924 Anders	0	0	0	
	6	7796	21.031	1000	Stykliste	111 Anders	5	0	0	
	7	16062	18.798	998	Stykliste	1.581 Anders	2	12	0	
	8	4365	17.697	1015	Vare	8.849 Anders	0	0	0	
	9	11265	16.677	999	Stykliste	3.335 Anders	3	10	0	
	10	2344	16.334	23	Vare	3 Anders	250	0	30	

264.326

Convert to static report Add to: This report Save Cancel

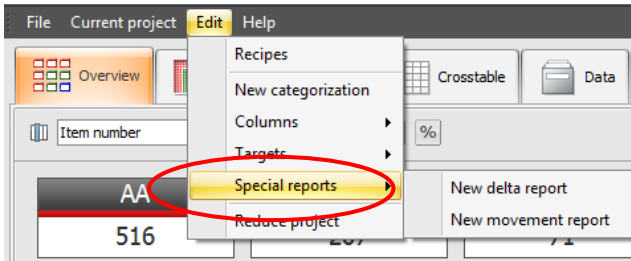
Choose "convert to static report". Before the report is converted, you will see a pop-up; if you choose "ok" all mathematical criteria are replaced with "ID-criteria." From here it is only the product number that defines whether a product number is in the report or not.

It is recommended that you name the report so it stands out from the rest in the report slicer. E.g. add the word "static" before the report name.

This is how the criteria looks for a static report.

When the report is converted, "new criteria" is shown in the pop-up window "edit report criteria".

Special reports

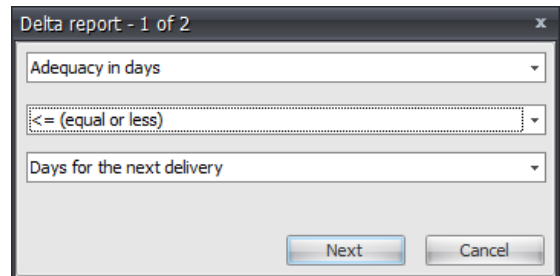


Add special reports; **delta and movement reports** to your analyse and identify items that change ABC category or items that potentially are going on back order before a new delivery arrives.

Delta-reports

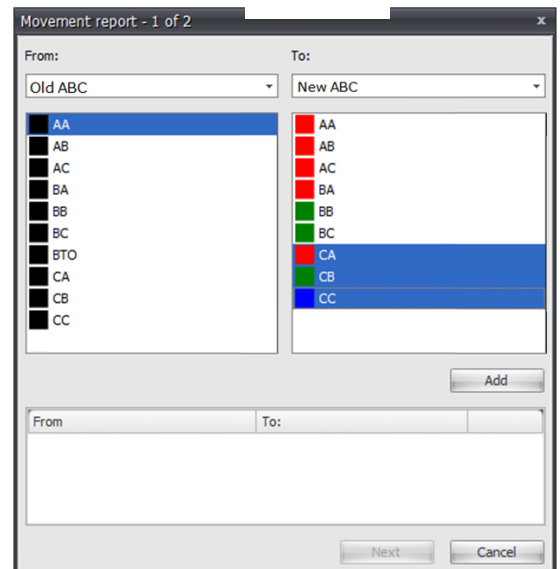
Using delta-reports you can e.g. identify items that are going on back order before a new delivery arrives, if the consumption continues as expected (see the screenshot). Consider to calculate adequacy using "Recipes"¹ in ABC Analyzer.

Set up a delta-report by choosing "New delta-report" in the top menu "Edit" and compare "Adequacy in days"¹ with "Days for the next delivery".



Movement reports

Use movement reports to monitor leaps between the different ABC categories when updating your data. Set up a movement report by choosing "New movement report" (below the top menu "Edit") and compare for example "AA" items from the Old ABC with "CA, CB and CC" items in the new ABC.



Read more about delta and movement reports here: <http://blog.abcsoftwork.com/2013/01/delta-and-movement-reports/>

¹ Use "Recipes" (in the menu "Edit") to calculate "Adequacy in days" or read more about recipes at: <http://recipe.abcsoftwork.com/en/>

Curious to know more?

Check out all our tutorials [here](#).

Or read about new features and get tips & trick on how to create cool analyses on our blog:

blog.abcsoftwork.com