

Aljex

Analytics

Version 1.0
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1.0 Introduction

Aljex users can now create a dashboard to analyze data metrics across selected time periods. Aljex Analytics provides a visual interface to create a chart or graph across a range of metrics including:

- Sales Rep
- Customer
- Office
- Ship Type
- Carrier

The dimensions to analyze the metrics are:

- Revenue (projected)
- Gross Profit
- Shipments

2.0 Analytics Overview

2.1 Accessing Aljex Analytics

Aljex Analytics can be accessed from the Reports dropdown in the Vision interface navigation:

Home	Shipments	Customers	Carriers	Equipment	Quotes	Reports	Reminders	Acco
						Activity Reports		
						Aging Reports		
						Analytics		
						AR Reports		
						Commission Reports ▶		
						Commission Reports		
						CRM Report		
						Financial IQ		
						Excel Reports		
						Flash Reports		
						Graphs		
						Radius Search		
						Safety Expirations		
						Search Shipments ▶		
						Trailers		
						Transcore vs Rates Paid		
						Unbilled Reports		

Users will only have access to office and shipment data assigned to them with respect to Agent Security.

2.2 Selecting a Date Range

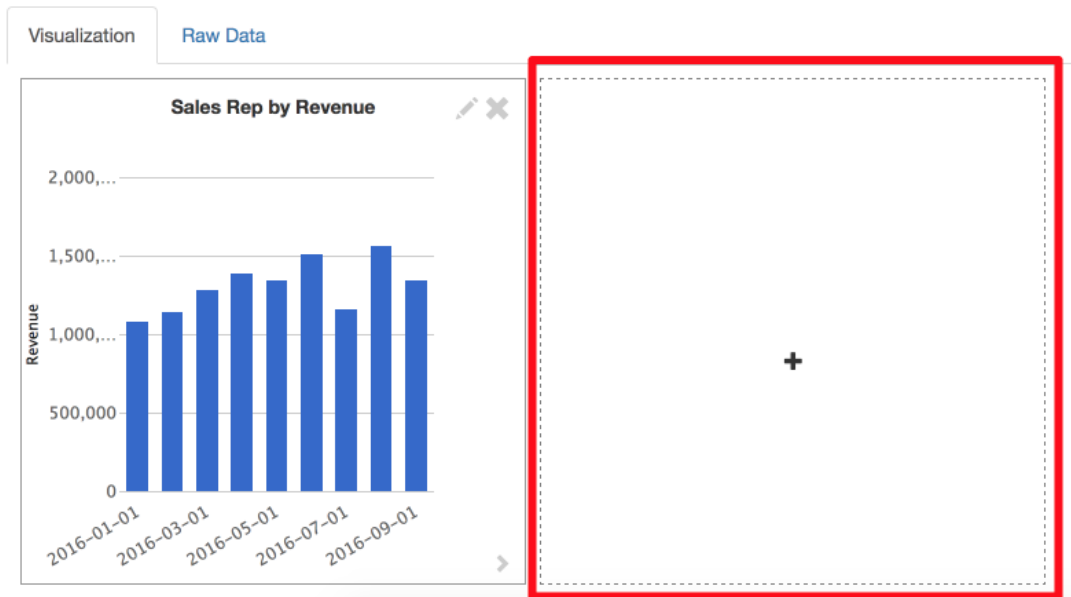
When logged in you can select the date range for reporting. By default, the past 365 days are selected. If a specific range is entered the system keeps it saved so that data can be examined across multiple sessions.

From:	<input type="text" value="01/05/2016"/>	To:	<input type="text" value="01/05/2017"/>	Invoice Date	<input type="button" value="Run Report"/>
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The date range can be designated by Invoice Date or by Ship Date as needed.

2.3 Creating Dashboard Reports

Dashboard reports appear in the Visualization tab. The module with dashed lines is where new reports are created.



Click on the '+' icon to create a new report module. The module options will appear:

The screenshot shows a form for creating a new report module. The form is enclosed in a dashed box and contains the following fields and options:

- Name:** A text input field.
- Metric:** A dropdown menu with 'Salesrep' selected.
- Dimension:** A dropdown menu with 'Revenue' selected.
- Graph Type:** A dropdown menu with 'Column' selected.
- Group by:** Radio buttons for 'Metric' (selected), 'Month', and 'Series/Month'.
- Buttons:** 'Save' and 'Cancel' buttons.

- The Name field is free form text and any title can be entered
- Select the metric for the report
- Select the dimension for the report
- Choose the Graph Type for the visualization
 - Column: displays Metrics on Y axis and Dimension on X axis
 - Bar: displays Metrics on X axis and Dimension on Y axis
 - Pie: displays break out of Metrics as a component of Dimension
 - Line: displays break out of Dimension across the range selected
- Select the grouping – Metric is default

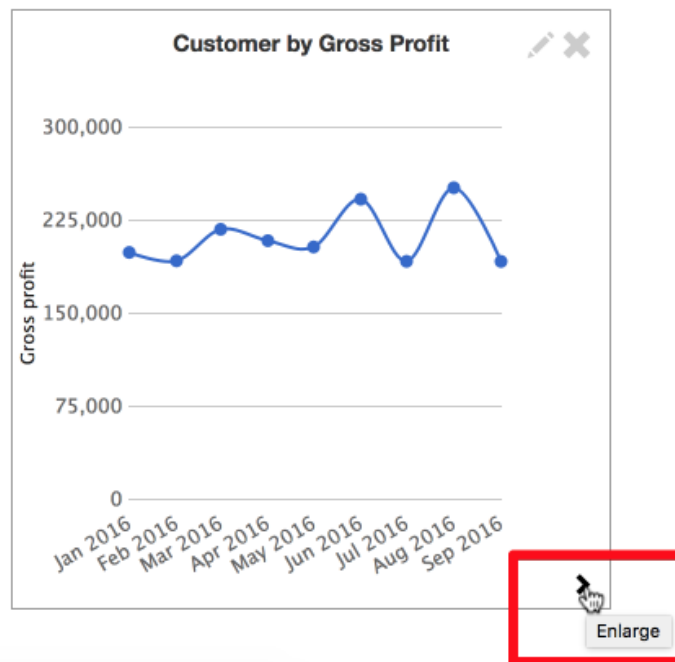
Click save and the dashboard report will appear.

Once a chart has been created you can modify the date range for the reporting period.

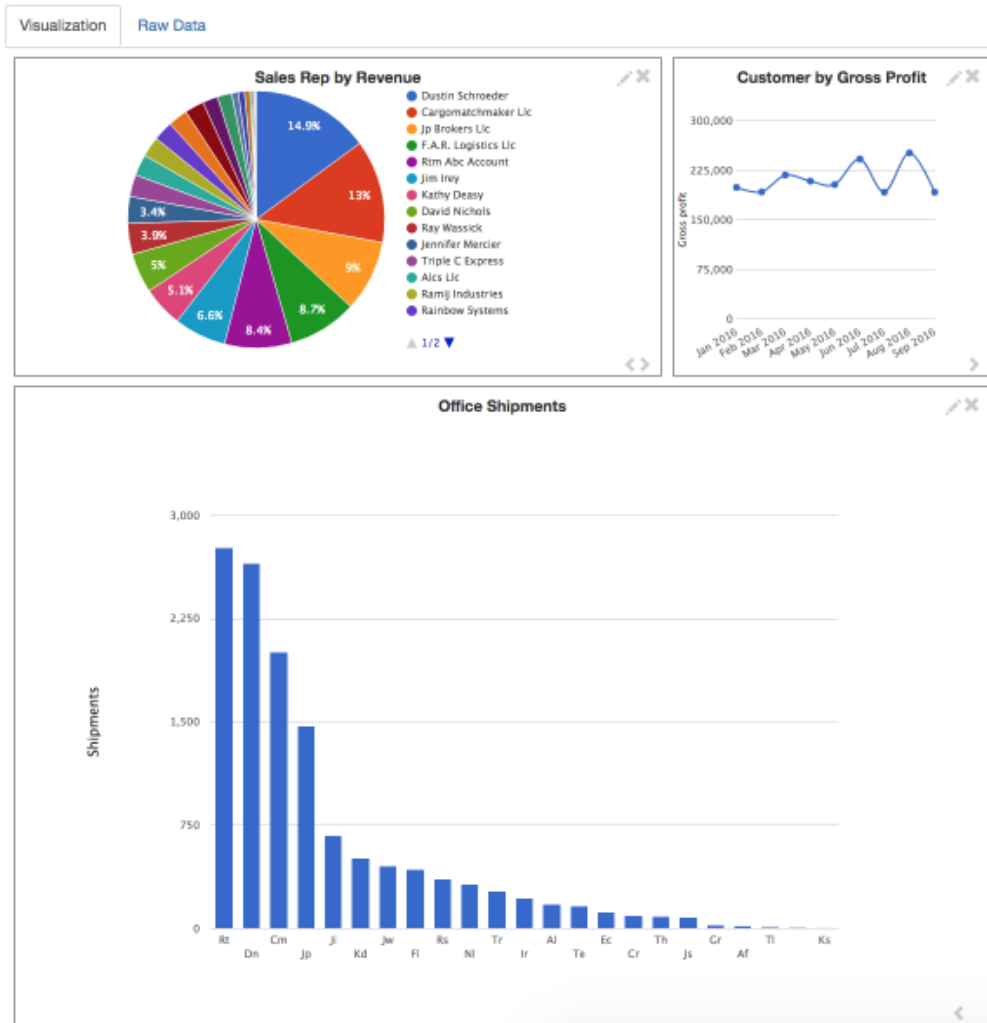
The report modules are automatically saved and will reappear on subsequent visits to the Aljex Analytics.

2.4 Extending Module View

Once a module has been created it can be extended by clicking the arrow at the bottom right corner of the module:



There are three sizes for the module. New modules always default to the smallest size.



2.5 Modifying and Deleting Existing Dashboard Modules

To modify an existing module, click the pencil icon in the upper right-hand corner. This will bring up the module creation fields.



To delete a module, click the X icon next in upper right-hand corner.



Note: This will immediately delete the module and cannot be undone.

2.6 Raw Data Export

A full export of the data is available on the “Raw Data” tab. Data that appears is for the selected timeframe.

From:	01/05/2016	To:	01/05/2017	Invoice Date	Run Report					
Visualization	Raw Data									
Download CSV										
Pro #	Ship Dt	Customer	Origin	Destination	Carrier	Proj Revenue	Proj Expense	Proj Gross Profit	Ratio	Salesrep
98553	12/25/20	Guided Logistics	Middlesex, NJ	Middlesex, NJ	n/a	0.00	0.00	0.00	n/a	Raytrans Management
						0.00	0.00	0.00	n/a	
Pro #	Ship Dt	Customer	Origin	Destination	Carrier	Proj Revenue	Proj Expense	Proj Gross Profit	Ratio	Salesrep
98430	12/25/16	Guided Logistics	Middlesex, NJ	Middlesex, NJ	n/a	0.00	0.00	0.00	n/a	Raytrans Management
98433	12/25/16	Guided Logistics	Middlesex, NJ	Middlesex, NJ	n/a	0.00	0.00	0.00	n/a	Raytrans Management
98443	12/25/16	Guided Logistics	Salt Lake City, UT	Heyburn, ID	n/a	0.00	0.00	0.00	n/a	Raytrans Management
98444	12/25/16	Guided Logistics	Salt Lake City, UT	Heyburn, ID	n/a	0.00	0.00	0.00	n/a	Raytrans Management
98445	12/25/16	Guided Logistics	Salt Lake City, UT	Heyburn, ID	n/a	0.00	0.00	0.00	n/a	Raytrans Management

The data is broken out into a table with the following columns:

- Pro #
- Ship Date
- Origin
- Destination
- Carrier
- Projected Revenue
- Projected Expense
- Projected Gross Profit
- Ratio
- Sales Rep

The data can be exported as a CSV for further reporting needs.