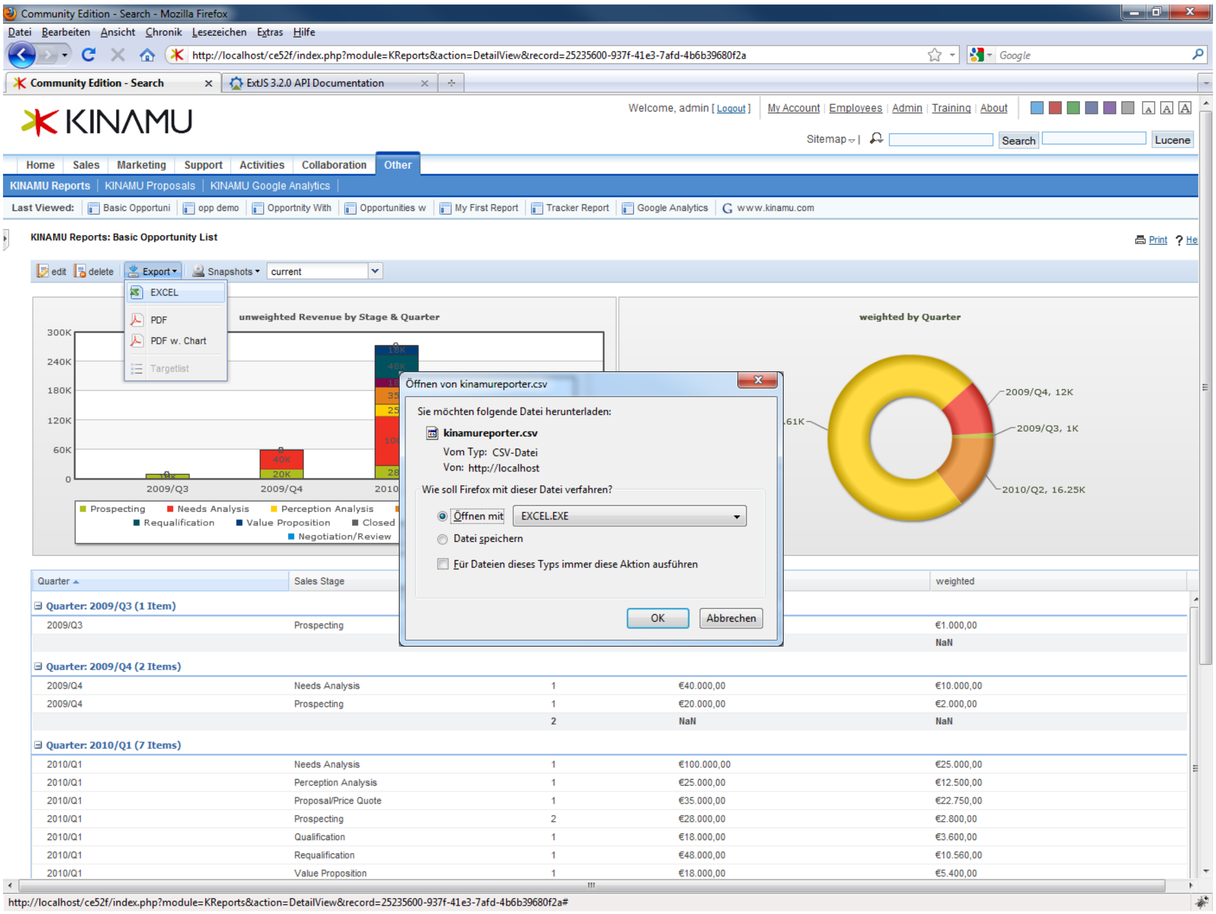
Exporting Data

Export to Excel

Data for Reports can be exported as Excel or as PDF with or without Charts. To Export to Excel select "EXCEL" from the Export Menu and the report will be exported as CSV File prompting you with a Dialog to either open the file or save it to Disk.

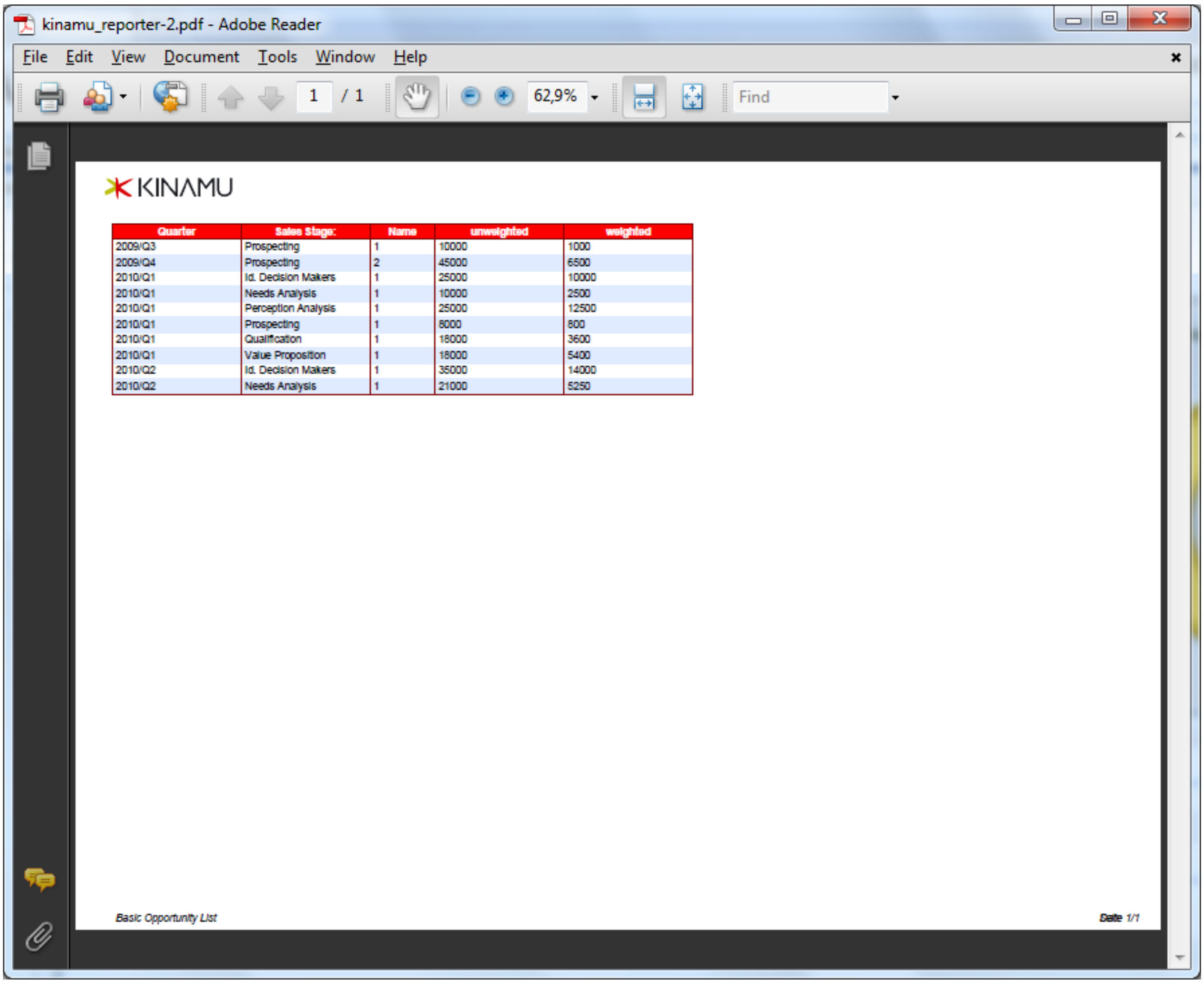


Screenshot 30 - EXCEL Download

Important for the Export to Excel are the users settings for the "*Export Delimiter*" as well as the "Import/Export Character Set". To ensure proper file creation as well as proper exporting of Unicode Characters please ensure that these settings are defined and set for each user.

Export to PDF

For the PDF Export you can either Export to PDF without the Charts. To Export without Chart hit the "*Export to PDF*" Menu Item. A Dialog will pop up with the downloaded PDF File that without Chart will look as follows opened in Acrobat.



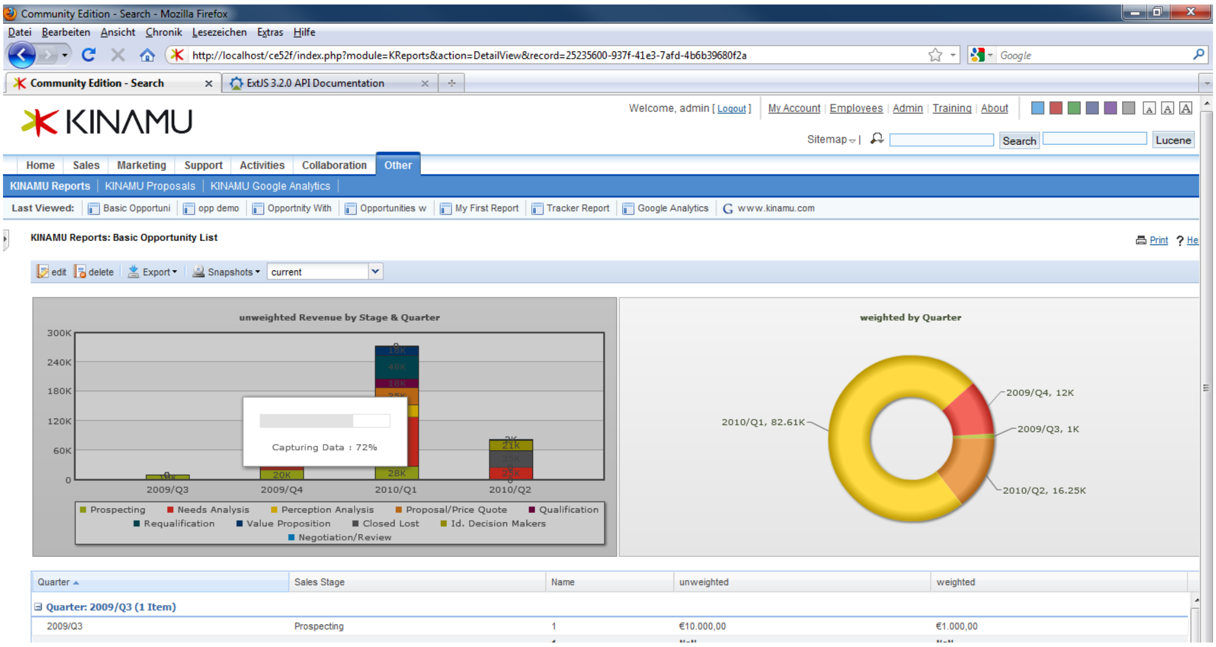
Quarter	Sales Stage:	Name	unweighted	weighted
2009/Q3	Prospecting	1	10000	1000
2009/Q4	Prospecting	2	45000	6500
2010/Q1	Id. Decision Makers	1	25000	10000
2010/Q1	Needs Analysis	1	10000	2500
2010/Q1	Perception Analysis	1	25000	12500
2010/Q1	Prospecting	1	8000	800
2010/Q1	Qualification	1	18000	3600
2010/Q1	Value Proposition	1	18000	5400
2010/Q2	Id. Decision Makers	1	35000	14000
2010/Q2	Needs Analysis	1	21000	5250

Screenshot 31 - PDF Export without Chart

To Export including the Chart select the "*Export to PDF w. Chart*" Menu Item. The System will capture the Charts and once finished prompt you with the complete PDF File.

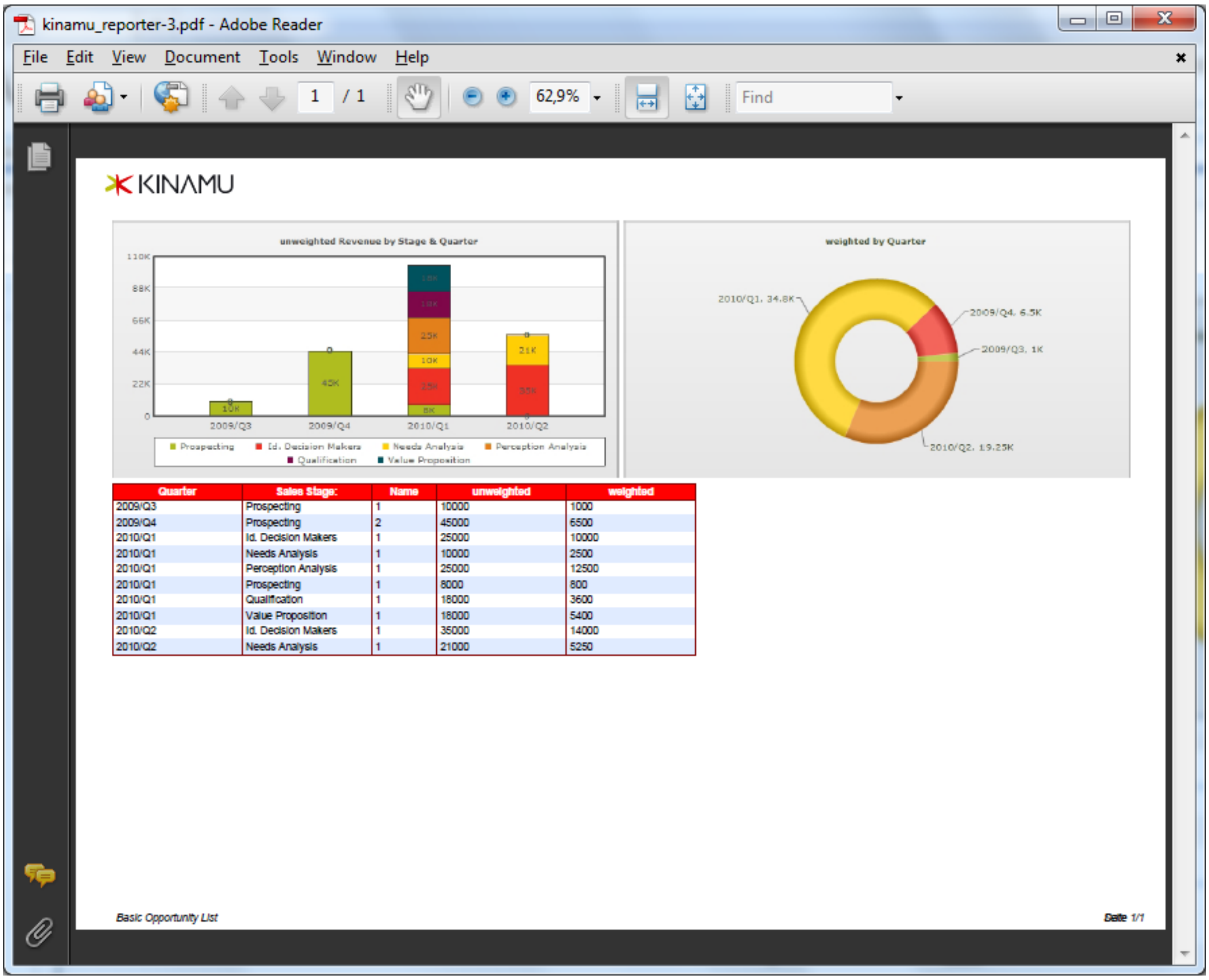
The Format (Portrait or Landscape) can be defined in the List Fields Section where you can choose the PDF layout option.

The Exporter also makes no checks if the number of Fields will fit onto the page nor if the size of the table cells as defined in the List Fields Section is long enough. This is your responsibility to setup the report properly.



Screenshot 32 - Chart Capture for PDF Export

The final PDF will look as follows:

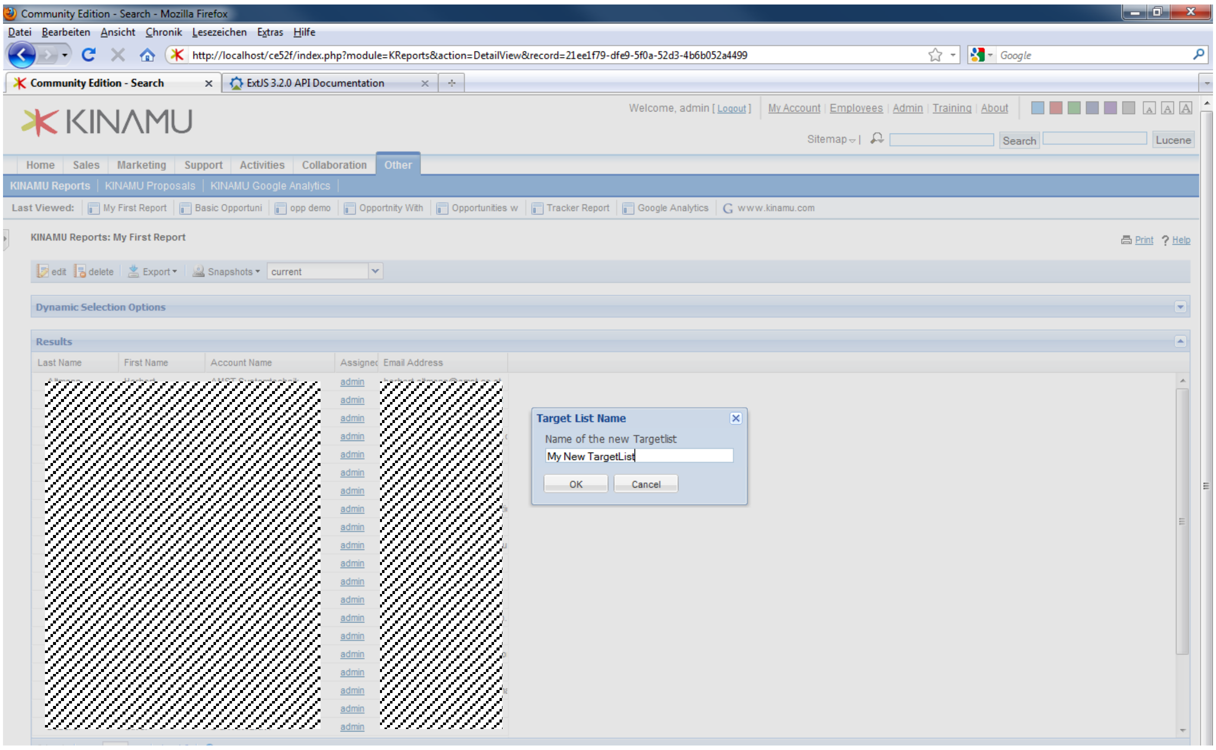


Screenshot 33 - PDF Exported with Charts

Export to Targetlist

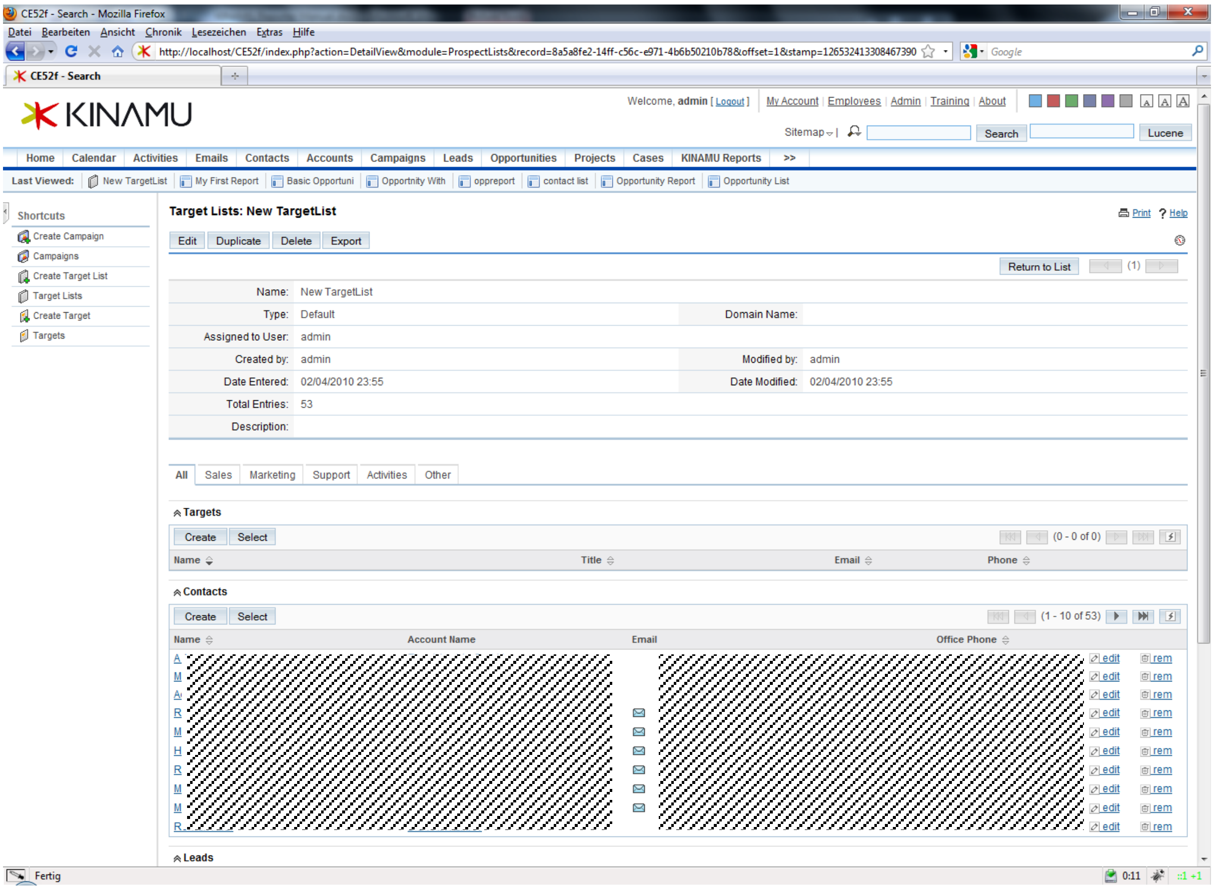
If you create a Report where the root report module can be linked in a Target List in SugarCRM (by Default these are either Contacts, Leads, Targets or Users but depending on your customization might also be Accounts or other objects) the menu item for Export to Target List will be enabled in the Export menu. The Result from our First Report we created at the beginning of the Document was for contacts and thus also had that Menu Item enabled.

If you select that Menu Item a Dialog will prompt you to specify the name for a new target list. When you confirm the Dialog the System will evaluate the Report and create a new target list which you will afterwards find in the Campaigns Module and can use it there for a new Campaign.



Screenshot 34 - Report with Export to target List Button (actual data grayed out)

With that Functionality you will be able to use the flexible Selection engine from the KINAMU Reporter to define target Lists for your campaigns. You cannot update a target list or add entries to a target list in the current version. To join multiple selections cerate multiple target lists and add those lists to one campaign.



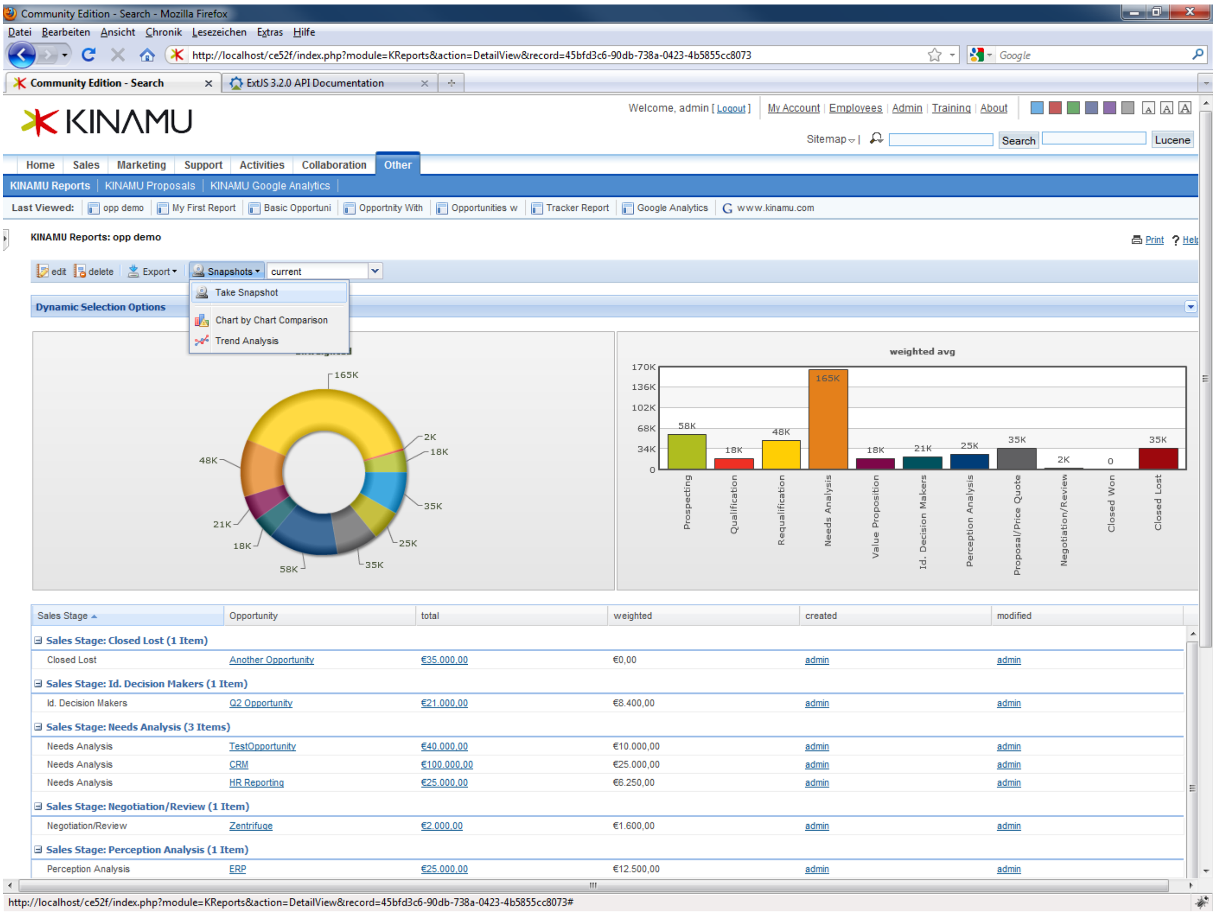
Screenshot 35 - target list created with the KINAMU Reporter (actual data grayed out)

Managing Snapshots

The KINAMU Reporter offers the capability to take Snapshots of Reports. A Snapshot is a capture of the Report Results at a given point in time. The basic idea behind the snapshot functionality is to allow capturing the report results at multiple points in time with the purpose to revisit the results and also to allow comparison of the results. A simple but typical example might e.g. be the capturing of Pipeline Data of opportunities within a company to monitor on the Pipeline Development over time.

Capturing Snapshots of Reports

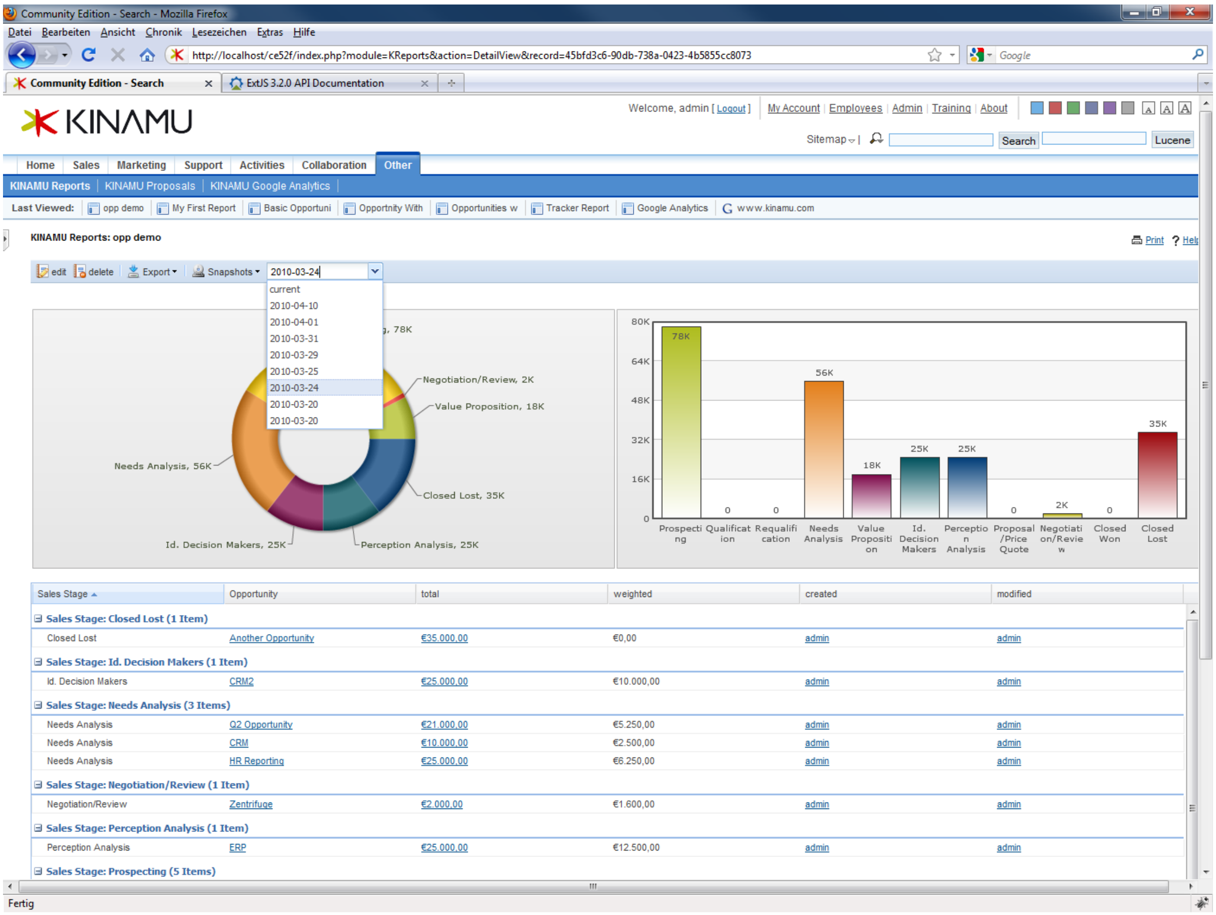
To take a Snapshot of the Report simply open the Report and select "*Take Snapshot*" from the Snapshots Menu.



Screenshot 36 - Taking a Snapshot

The System will gray out the browser window while taking a snapshot and then return. If you select the Snapshot Dropdown it will show you available Snapshots for this report. "*current*" is the entry for the actual results selected from the database. All other Snapshots are listed with the date they have been taken and are listed in chronological order backwards from the most recent one.

To list the results for a specific snapshot simply select the snapshot and the system will dynamically update the Charts and also the reports area.



Screenshot 37 - Selecting a Snapshot to Display

If you select the Export options this will also export the snapshot data which also allows you to export e.g. to Excel the list as it was some time ago.

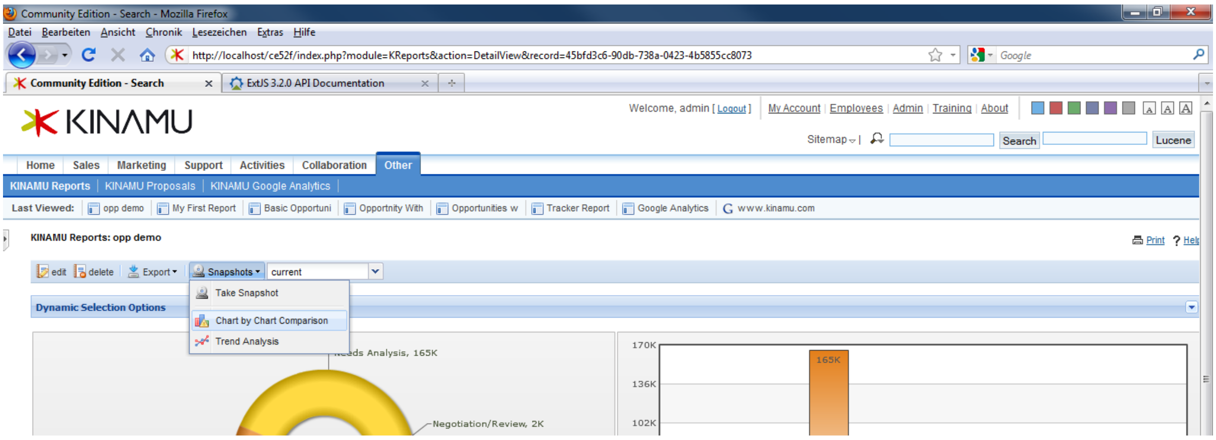
Important Things to know about Snapshots

1. Snapshots will at the time taken not consider any dynamic select options but take the options set in the report by default. This is done to secure comparison between snapshots taken.
2. Once you have taken a snapshot you can still change the report. There is no restriction (currently) to that change. Yet be careful when changing since the Snapshot only captures the report results. If you change list options or chart data the Snapshots might become not further useable since the main report parameters have changed. Edit Options might be restricted in the future.
3. Snapshots capture the full results of the report. Depending on the report this might be significant amounts of data. Be sure to only capture snapshots on those reports where the capability to go back in time is a requirement.
4. If you are viewing a snapshot there are no dynamic filter options. Filtering is only possible if viewing the current data.

Comparing Snapshots Chart By Chart

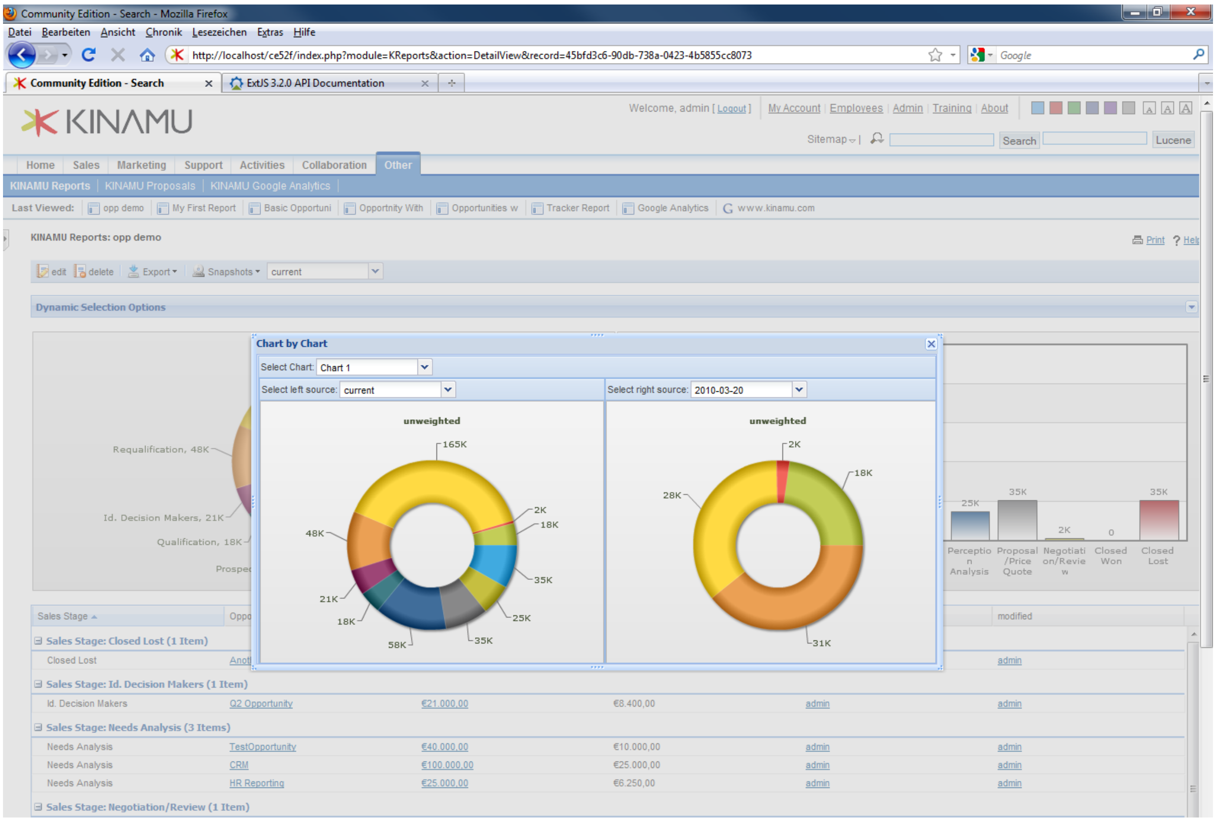
A key functionality for Snapshots is the comparison of data. The first Option is to compare Snapshots by viewing Charts for different Snapshots next to each other.

To compare two snapshots side by side select "*Chart by Chart Comparison*" from the Snapshots Menu.



Screenshot 38 - Selecting the Chart by Chart Comparison Option on the Snapshots Menu

Selecting the Option will open the Chart by Chart Comparison Window. In the Toolbar you can select the Chart you want to compare and then select for the left and the right side the Snapshot you want to compare. Change Snapshots and Chart to compare and the charts will dynamically update as you compare results.



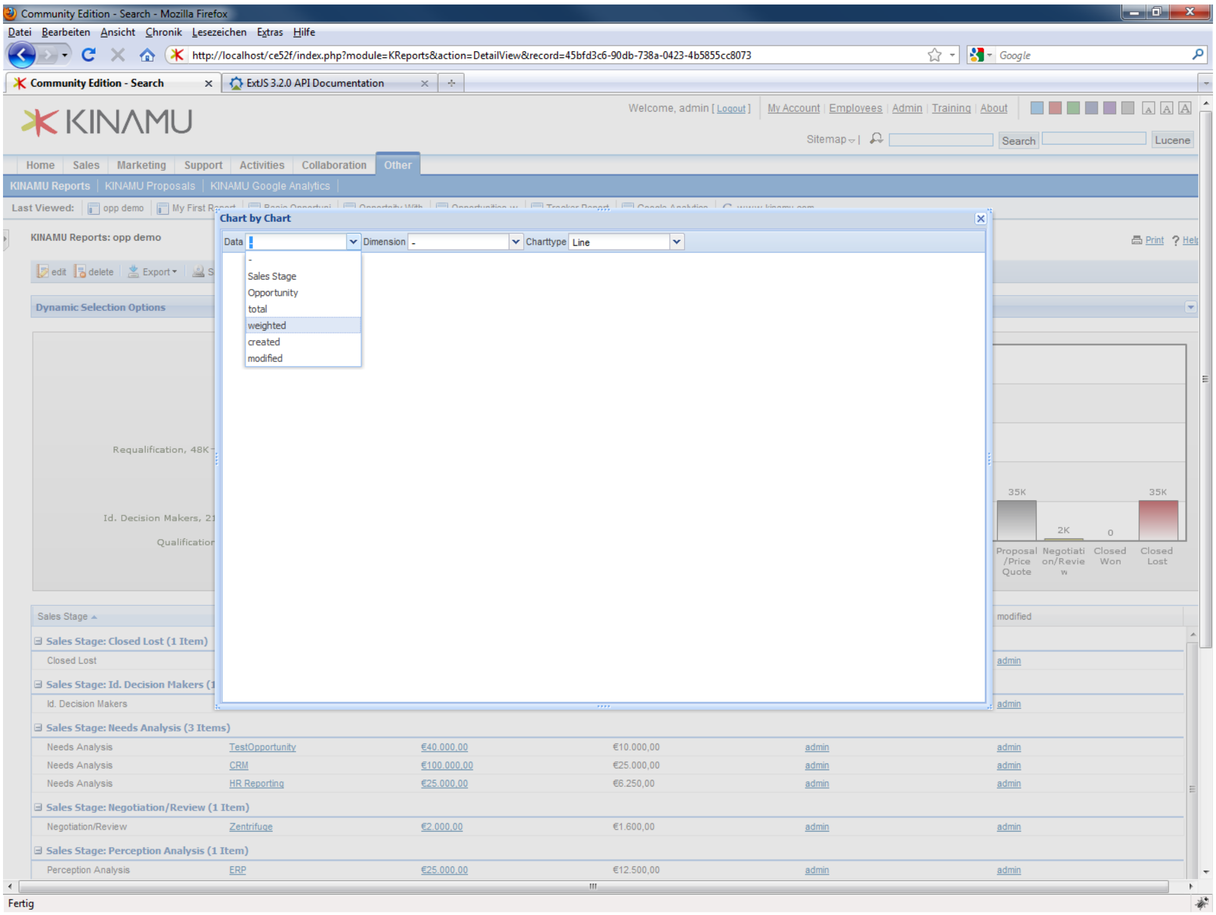
Screenshot 39 - Chart By Chart Comparison Window

The Chart will be representing the Chart as defined for the report using the given data from the Snapshot.

Comparing Snapshots using the Trend Analysis

Another powerful option is to compare snapshots using the Trend Analysis. Trend Analysis allows you to select a single Value from the Charts and compare it over the curse of all Snapshots taken showing the development of the specific value (e.g. the Opportunity Value). Furthermore you can break that value up by another dimension (e.g. the Sales Stage or the assigned user) to further detail and compare developments.

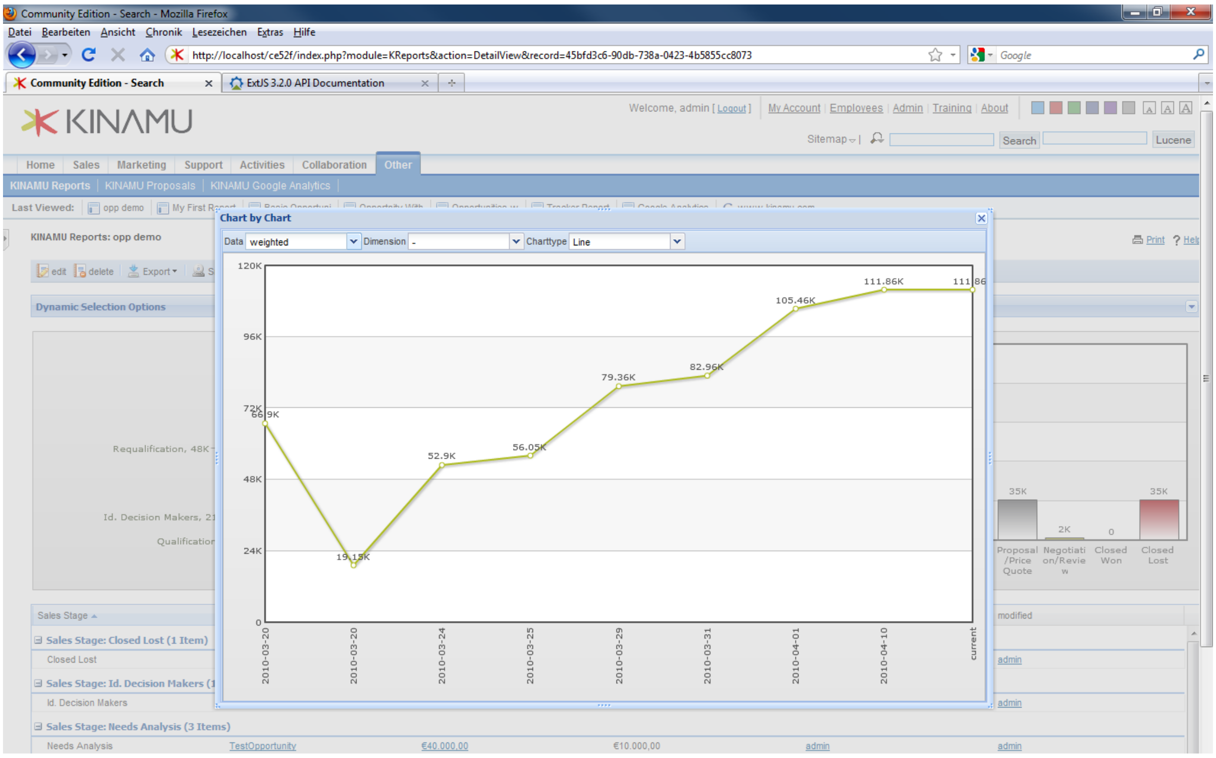
To start the trend analysis select "*Trend Analysis*" from the Snapshots Menu. The Trend Analysis Window Opens.



Screenshot 40 - the Snapshot Trend Analysis Window

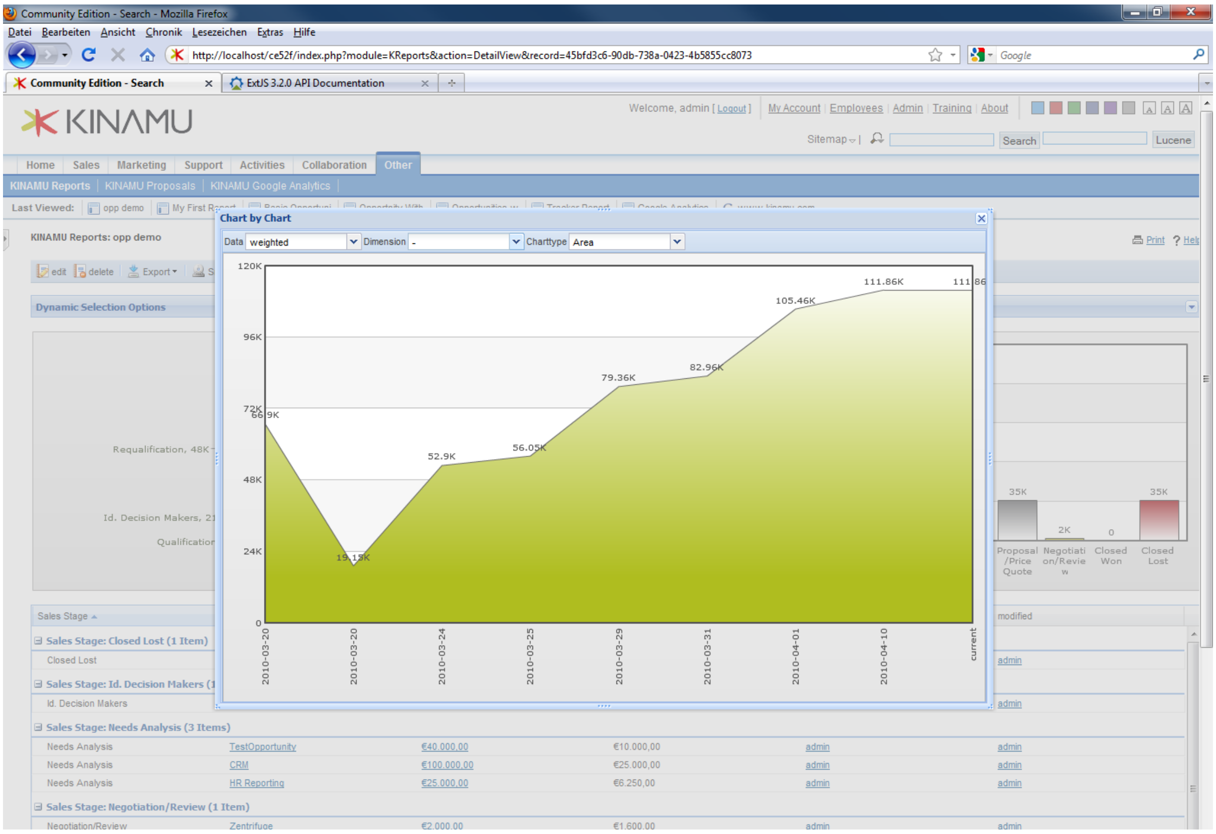
The Options to select are (1) the Data to use from the report results for the trend analysis, (2) the Dimension as an additional category to break down the results and (3) the Chart Type to use.

Selecting only the Data Series will produce a Graph using the chosen Chart Type over the available Snapshots.



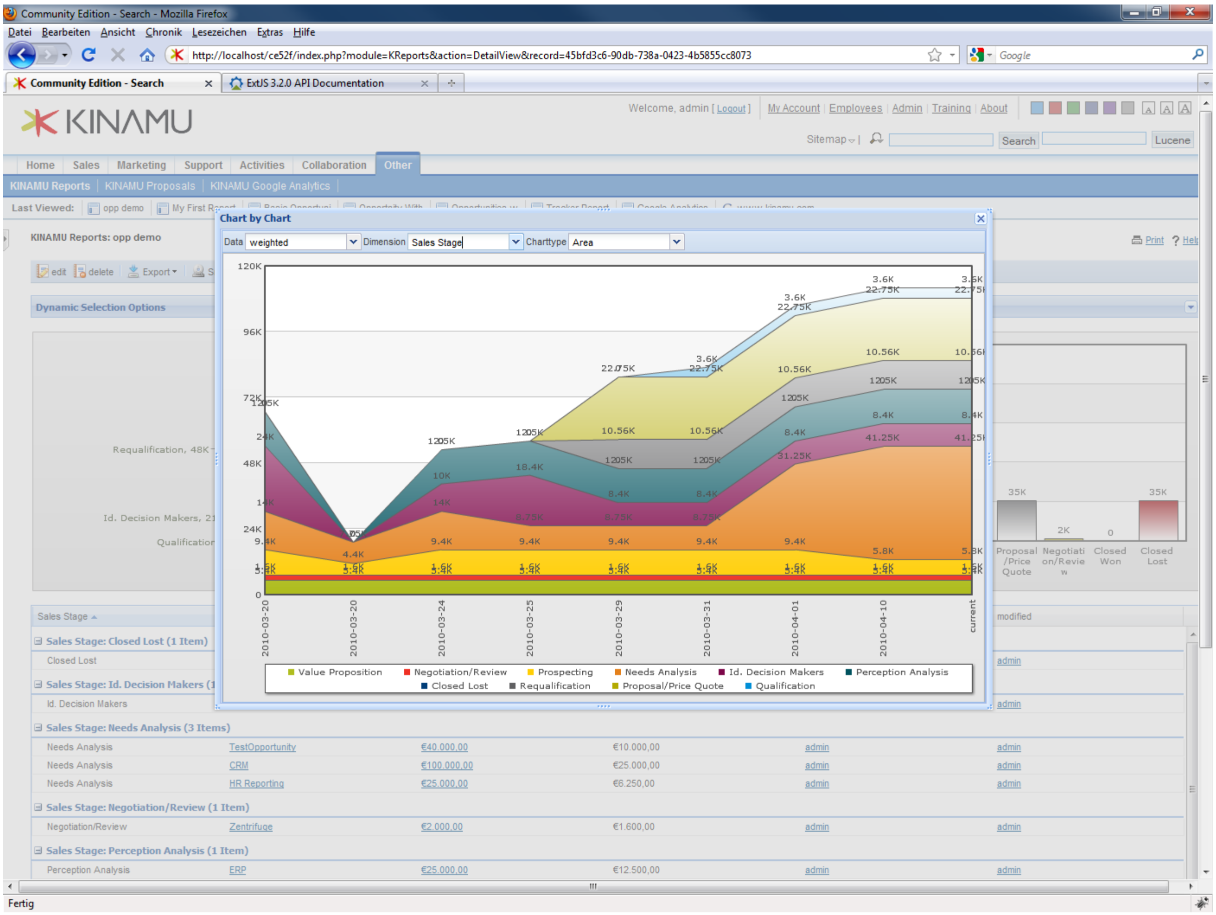
Screenshot 41 - Trend Analysis for a data series without Dimension

To change the Chart Type simply choose another type from the dropdown and the chart will reload dynamically.



Screenshot 42 - Changing the Chart Type for the Trend Analysis

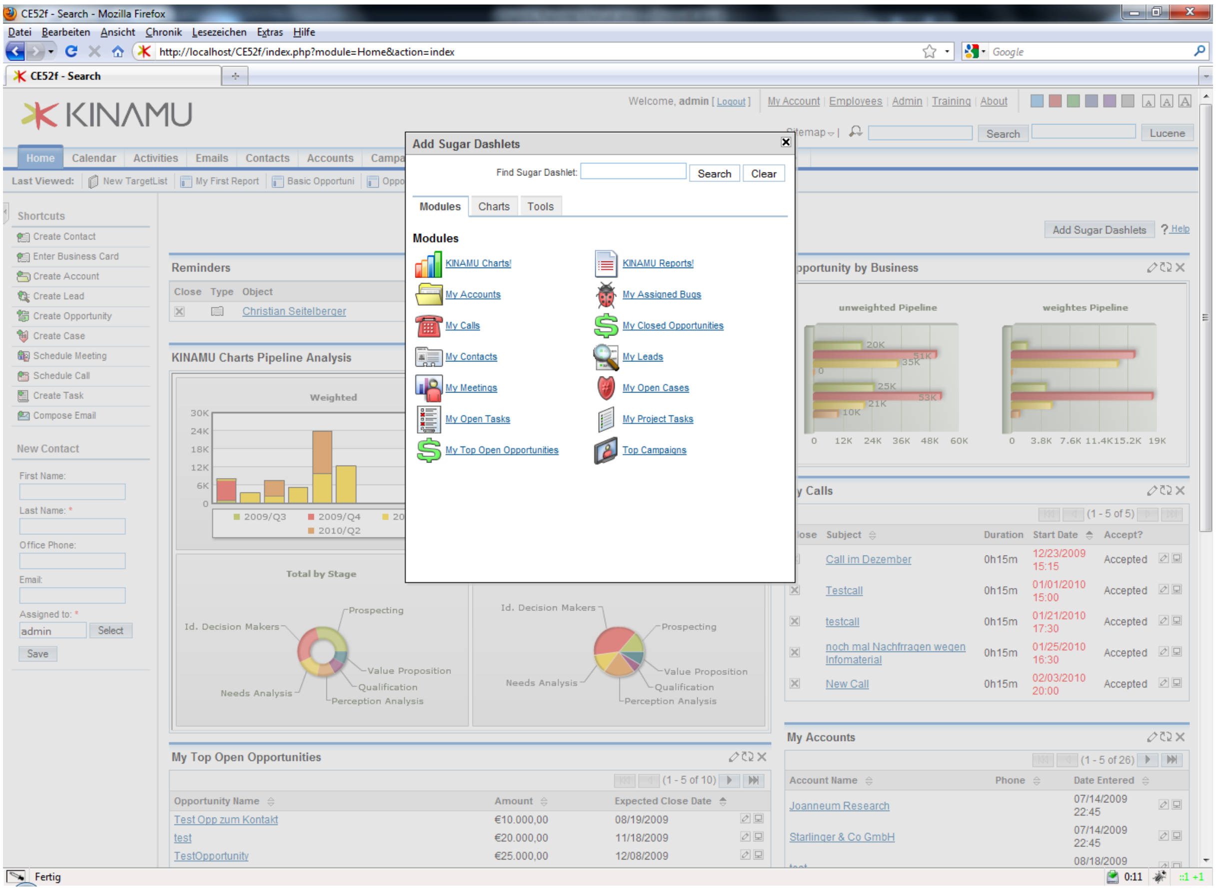
If you also choose Dimension from the available Options this will produce a Multiseries Chart with a Series per Dimension on the given Datapoint. In our example this will be the weighted revenue over the Sales Stage. If we also change the dimension the chart updates dynamically and shows development of the data over the snapshots by dimension.



Screenshot 43 - Multidimensional Trend Analysis

The KINAMU Reporter Charts Dashlet

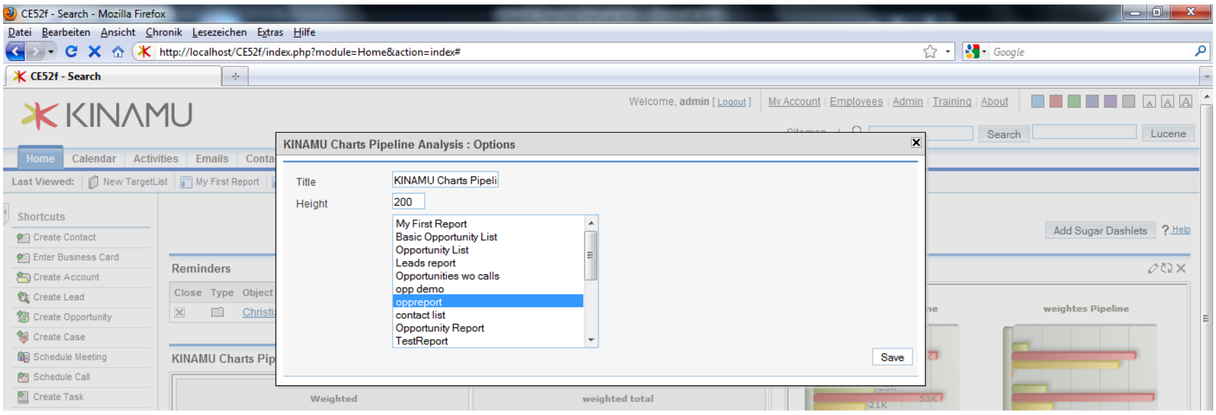
Charts generated with the KINAMU Reporter can also be displayed as part of the Home Screen in SugarCRM with a custom Dashlet that is part of the Module. To add a Chart go to the Home Screen and select "*Add Sugar Dashlet*" in the CE Edition or add a Dashlet for one of your tabs in SugarCRM Professional.



Screenshot 44 - Adding the KINAMU Charts Dashlet

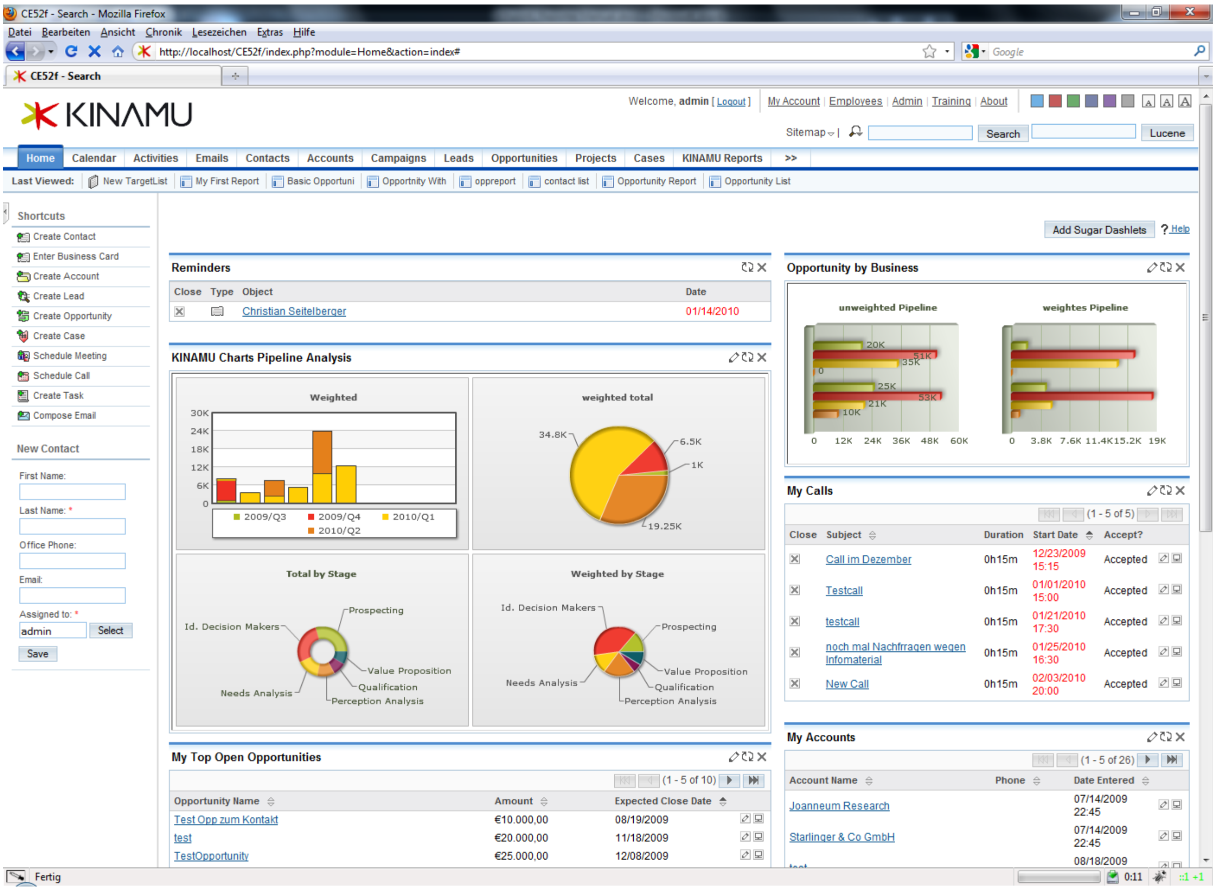
Select "KINAMU Charts!" and after Sugar has added the Dashlet reload it. To select a Report click the Configure Button in the Dashlet and

- specify a Name for the Dashlet
- specify the heights for the Charts in the Dashlet. This will help you to ensure that your Home Screen still is useable but also your charts are readable.
- Select a Report from the Dropdown. Currently there is no evaluation if the Report has Charts or not – so this is up to you to select the proper one. Some checks might be added in the future – in the meantime we hope you can manage to select a proper report by your own.



Screenshot 45 – KINAMU Charts Dashlet Configuration Dialog

Reload the Page and your Chart will show in the same layout as it did in the Report.



Screenshot 46 - Home Screen with KINAMU Reports Charts Dashlets

