Oracle® Retail XBR Loss Prevention and Store Analytics

Web Application Training Guide

Release 7.0

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Oracle® Retail XBR Loss Prevention and Store Analytics Web Application Training Guide, Release 7.0

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C H A P T E R 1

XBR Store Analytics

OVERVIEW

Note: The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.

The Web application provides remote users' access to the XBR Loss Prevention Analytics application via a web browser on the desktop. It is designed to work in conjunction with the XBR Loss Prevention Analytics Desktop application. Users can access both applications or either depending upon their application needs and user setup defaults.

The XBR Loss Prevention Analytics - Web Application allows users to access the following functionality:

- **Dashboard User Interface** - Provides the users with a portal, which allows them to customize various components on their screen.
- **Query List** - Adhoc reports can be run either Offline or Immediately, set parameters, input pre-filter criteria, select date parameters, perform Top Level X reporting, sort, filter, export, link and print.
- **My Report** -Storage area for user-defined saved Adhoc reports.
- **Exceptions** - Review exception results that were detected from by Control Queries set to run in the Desktop application.
- **Scheduling**- Schedule Adhoc queries to run automatically.
- **Alerts** - User-defined criteria that automatically generate Alert report results.
- **Store and Employee Watch list** capability - Flag a visual indicator to mark a store or employee activity as being watched more closely.

Access to both the XBR Web Application and/or the Desktop application is driven by the specific needs and functionality of individual users determined by your organization.

LEARNING OBJECTIVES

Upon completion of this section, you will know:

- Launch the XBR Loss Prevention Analytics Web application URL
- Login to the XBR Loss Prevention Analytics Web application
- Overview of the Dashboard screen

LOGGING IN

Each organization that purchases the XBR Loss Prevention Analytics Web Application will be provided a URL specific to that organization. Once the URL is launched through a web browser, each user will be prompted to login to the application with a unique user ID and password. The initial password must be changed after the first login and the new password must meet the established complexity requirements.

How to Log In to Analytics

1. Type the provided URL into the Address field of your web browser. The Web Application login screen is displayed.

Figure 1-1: XBR Web Application Log In Screen

2. Type your **User ID**.

> Once you have logged in successfully, the dialog box remembers your **User ID** and automatically places the cursor in the **Password** box for you the next time you log in on the same computer.

3. Click in the **Password** text box and type your password. Passwords are case sensitive.
4. Click the **Sign In** button or press the **[ENTER]** key.

5. If this is the first time you have logged in or if you are got a new password in an email, you will be asked to change your password:

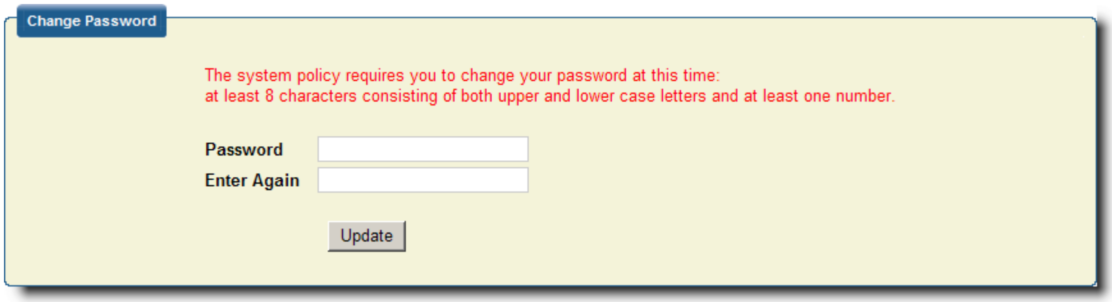


Figure 1-2: Change Password Dialog Box

Enter your new password twice.

Overview of the Dashboard Screen

The Dashboard allows the remote user to access Adhoc queries and other functionality of Analytics. Users can customize their home page of the Dashboard by determining which applets they prefer displayed automatically once they've logged in to the application. The application menu on the left side of the screen is used to navigate throughout the application.

- Home (Analytics home page)
- Alerts
- Exceptions - displays exception report results that users can then investigate for patterns of activity, watch status levels for cashiers and stores, notes written against cashiers/stores, etc.
- Query List
- My Reports
- Links

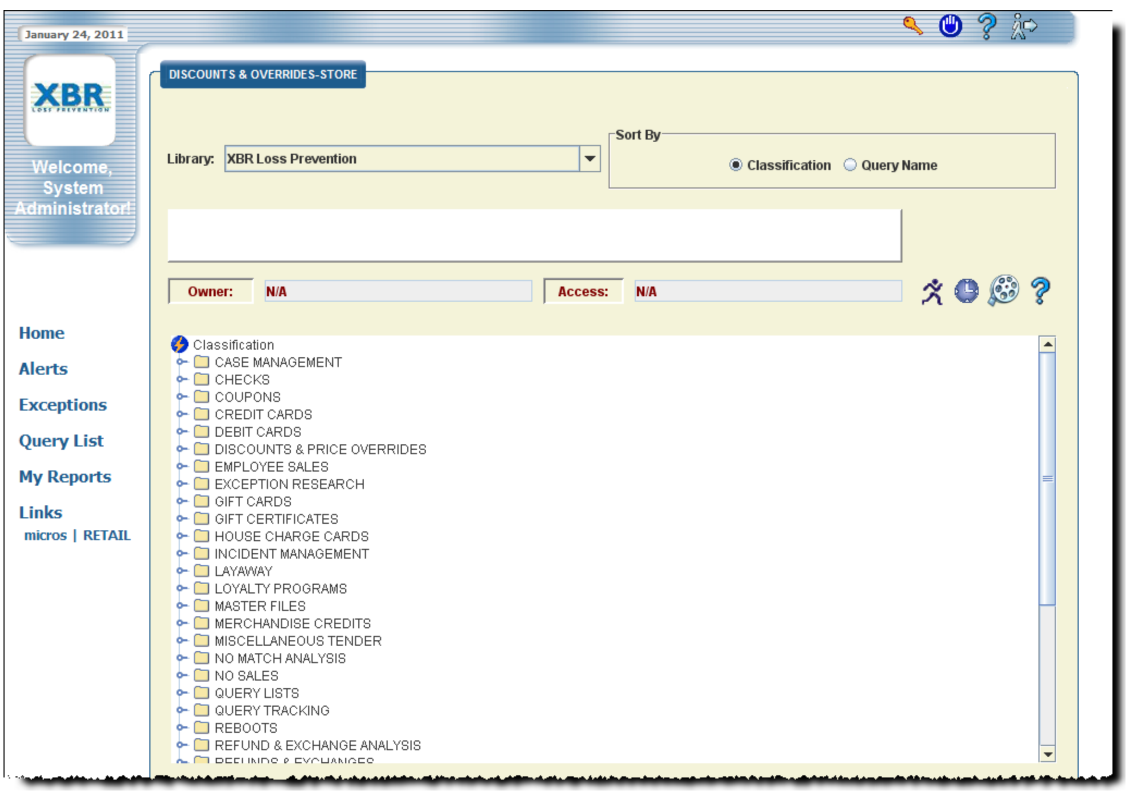


Figure 1-3: Dashboard Screen

The right side of the screen contains the various portals and Analytics functionality and can be customized by user. It can include any variation of the portlets available in a user's profile. Please refer to Chapter 8, “Customizing the Home Page" on page 111 for more detailed information.

REPORT WINDOWS

Starting with version 7.0, when a query is run, the results are displayed in their own, separate window. Having reports in separate windows makes it easy to switch from one report to another.

Depending on display size, reports can be displayed side-by-side or one over another making it easy to compare data in one report with that of another.

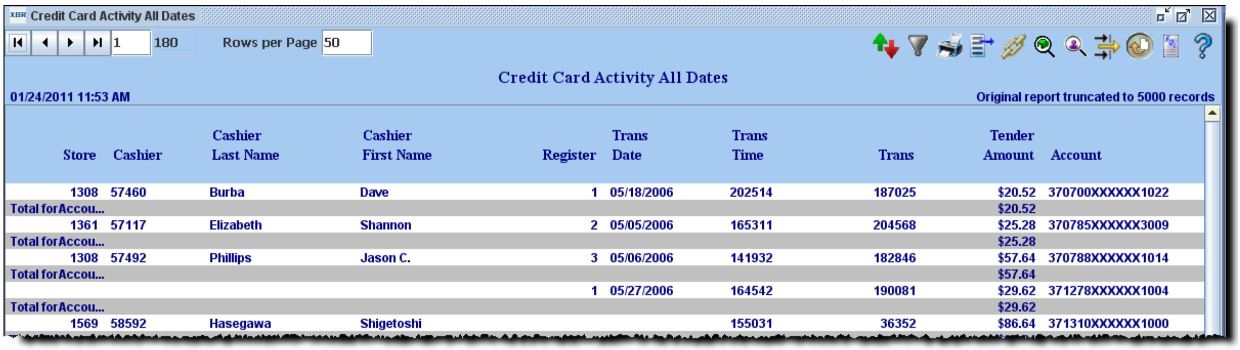
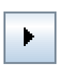
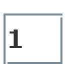


Figure 1-4: Report Window

Page Controls

You can navigate through the pages of your report by using the page controls.

Control	Description
	Takes you to the first page of the report.
	Takes you to the previous page in the report.
	Takes to the next page in the report.
	Takes you to the last page in the report.
	Allows you to specify which page in the report to go to. Enter the desired page number and press **[Enter]**.

Report Controls

The report controls allow you to perform various tasks on the data. The table below gives a general description of each function that is described in detail in later chapters.

Icon	Description
	**Sort** - allows you to change the order of the records that appear in the report results.
	**Filter** - allows you to focus on specific result(s) of the query after the query has been run.
	**Print** - allows you to print the report in a PDF format.
	**Export** - allows you to save the file permanently until the file is manually deleted. You can retain Adhoc results with having to rerun the query.
	**Link** - allows you to review associated queries based on the results of another query.
	**Store Watch List** - allows you to assign a watch status to a store.
	**Employee Watch List** - allows you to assign a watch status to an employee.
	**Query Filter Display** - displays the parameters and criteria that were set for the query.
	**Update Report Format** - makes any changes to column width or order permanent.
	**Report SQL** - displays the SQL code that generated the report.
	**Help** - provides detailed information and/or instructions about working with query results.

CHAPTER 2

Adhoc Queries

Overview

This section will cover how to run an Adhoc query. Once the run window is accessed, users can designate a time frame to run queries for, set parameters or pre-filter criteria to help narrow query results, and select a Top X Level filter.

Learning Objectives

LEARNING OBJECTIVES

Upon completion of this section, you should be able to:

- Run an Adhoc query
- Select a time frame
- Recognize and set parameters
- Specify criteria to pre-filter query results
- Run Top X level queries
- Setting Session Parameters
- Run graphed queries

RUNNING ADHOC QUERIES FROM THE QUERY LIST

Adhoc queries report information at various levels of analysis - for example, summary reports by store, by cashier, by account number (such as credit card or gift card), or detailed reports by specific transaction numbers. Adhoc queries can link to one another allowing users to start at a summarized level of analysis and link down to the specifics of a transaction. Adhocs are located in the Query List and can be sorted by classification or alphabetically by query name. When running a query, various criteria can be specified in order to pre-filter the data that is returned.

How to Run an Adhoc Query

1. Click the **Query List** link from the application menu or from the Query List portlet on the Dashboard, if available.

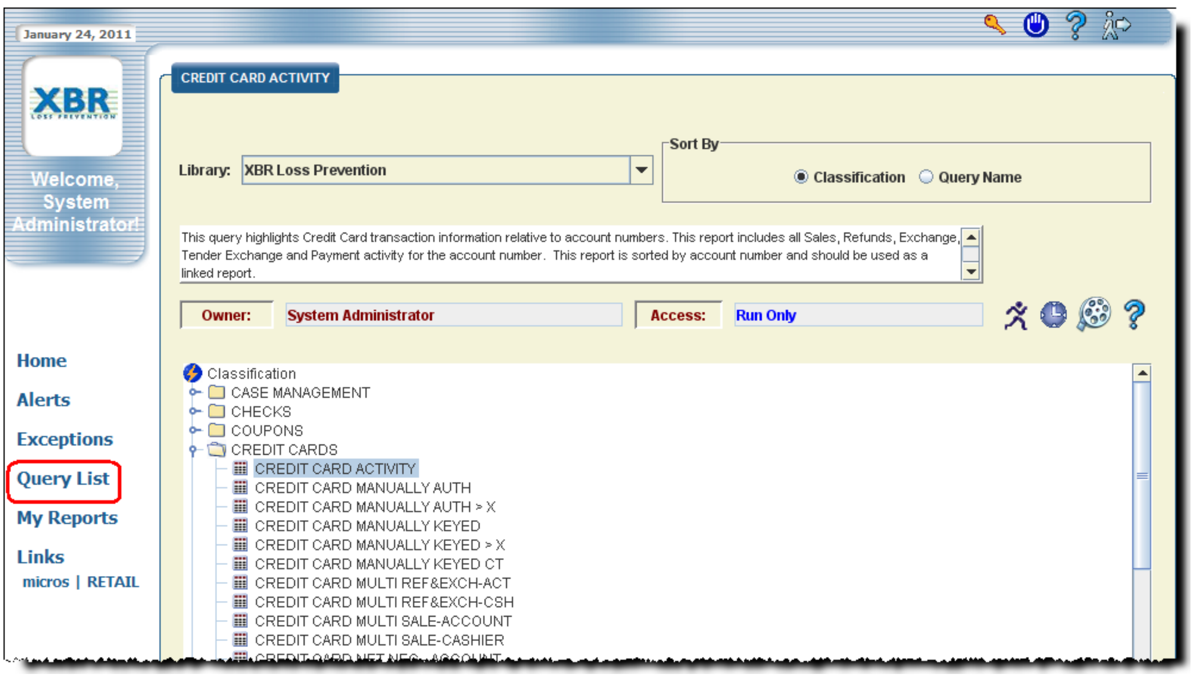


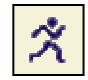
Figure 2-1: Query List

2. Select the appropriate **Library** where the query is located.

> XBR Loss Prevention is a commonly used library.

3. By default, queries are sorted by **Classification**. Expand the **Classification** by double-clicking the folder.

   To sort alphabetically by query name, select the **Query Name** option from the **Sort By** section.



4. Double-click a query name to run it or select the query name and click the **Run** button. The **Run** window will appear providing a variety of options.

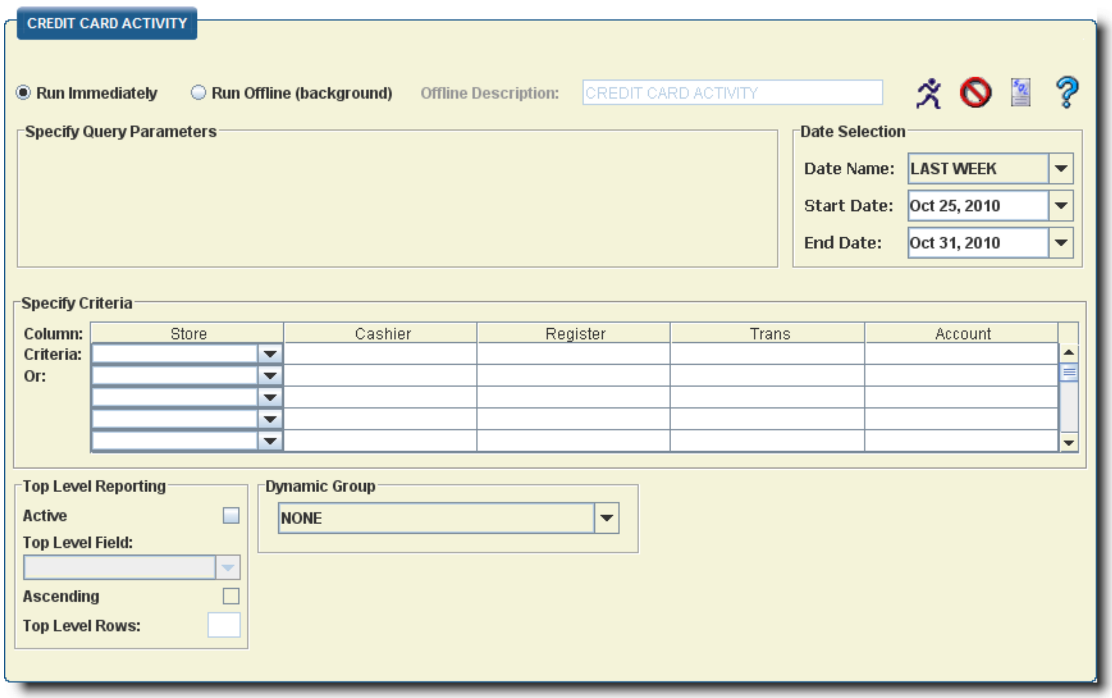


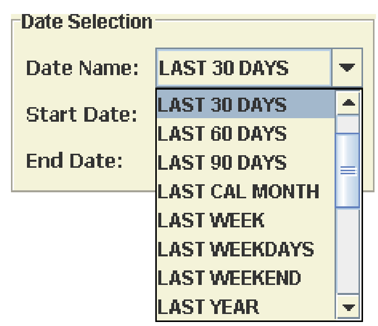
Figure 2-2: Run Window

Option	Description
Run: Immediately	Select this option if you want to wait for the query to run and display the results. Once the results are displayed you can sort, filter, export,.etc. However, the results are not saved you will have to rerun the query to view the results.
Run: Offline (background)	A report can be scheduled to run in the background and saved. This allows the user to access the report at anytime in My Reports, since the data is stored with the report and the application does not have to regenerate the data. Select Run Offline (background) to run the report in the background so you can then move on to perform another task. Type a description in the Offline Description text box.
Date Selection	Define the time period that you would like to represent in your query results. The Date Name area contains a list of pre-defined time frames. Commonly selected Date Names include: Yesterday, Last Week, Last 30 days. A custom time period can be selected instead of a date name by using the Start Date and End Date options.

Option	Description
Specify Query Parameters	■ Greater than or less than X parameters allow customers to report data over or under a certain amount or quantity (for example, Cash Refunds > X). ■ Multi-use prompts allow customers to report information, such as checking account numbers or credit card numbers that have been used multiple times. ■ Time prompts allow users to report information that occurred before or after a specific time (for example, Post Voids Before and After Hours).
Specify Criteria	Pre-filter information on fields such as store, cashier, or account number. The columns that appear in this section vary depending on the report that is being used.
Top Level Reporting	The ability to display the top # of rows for a specific field that the user chooses.
Dynamic Group	Select a group from the drop down list. A group can only be created in the Desktop application. Criteria were set to create the group so that the query will only gather and display results for that group. For example: A group may be created for any associate that is a Manager and is Part Time. If you select this group from the drop down menu the results for the query would only report on Managers who are part time. If there are groups that you consistently want to run reports against contact your Analytics System Admin to have them create the group.

Date Selection

To identify the time period of a query, select a date range from the **Date Name** list. The Date Names that appear in the drop-down list were pre-defined during software installation. Your System Administrator can create additional Date Names, if needed.

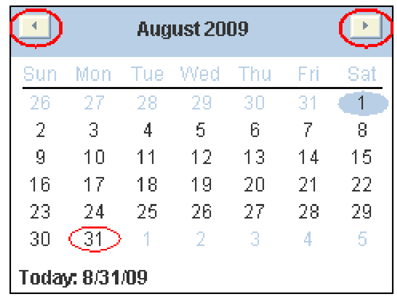


Use the **Start Date** and **End Date** prompts to define a custom time period that does not appear as a **Date Name** in the drop-down list.

How to Use a Custom Time Period

*The custom time period that you select using the **Start Date** and **End Date** options takes precedence over the **Date Name** selection.*

1. Click the down arrow in either the **Start Date** or **End Date** area. A calendar of the current month is displayed.
2. Use the arrows to display the month you would like to select from. The left arrow moves to a previous month and the right arrow moves to a later month.
3. Click on the day that you would like to use as either the start date or end date.



Parameters

Parameters allow you to identify a value as a method of pre-filtering data in a query. For example, in a *Cash Refunds & Exchanges > X* query where X is the parameter value, the value might be "-50". When the query is run, the results will be any Refund or Exchange greater than -50. The following is an example of some of the parameters that are available in some of the queries:

TIP *Refund Dollars are expressed as a negative number. For example: -100.00 represents a refund of $100.00.*

Greater than X parameters are used to report data over an amount or quantity you choose. When running the *Cash Refund & Exchanges > X* query, enter the refund or exchange amount (as a negative) above which you want to research.

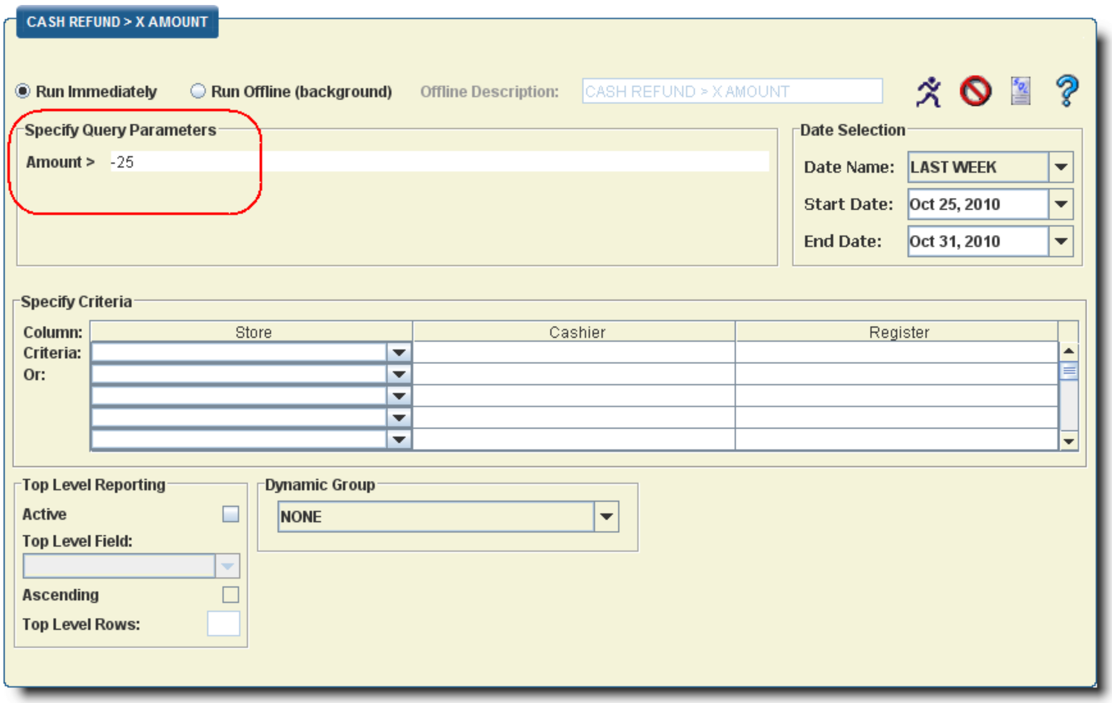


Figure 2-3: Specify Query Parameters - Greater Than X

Multi use reports are used to display account numbers that have had multiple sales or refunds processed against them or account numbers that have been issued and redeemed against multiple times.

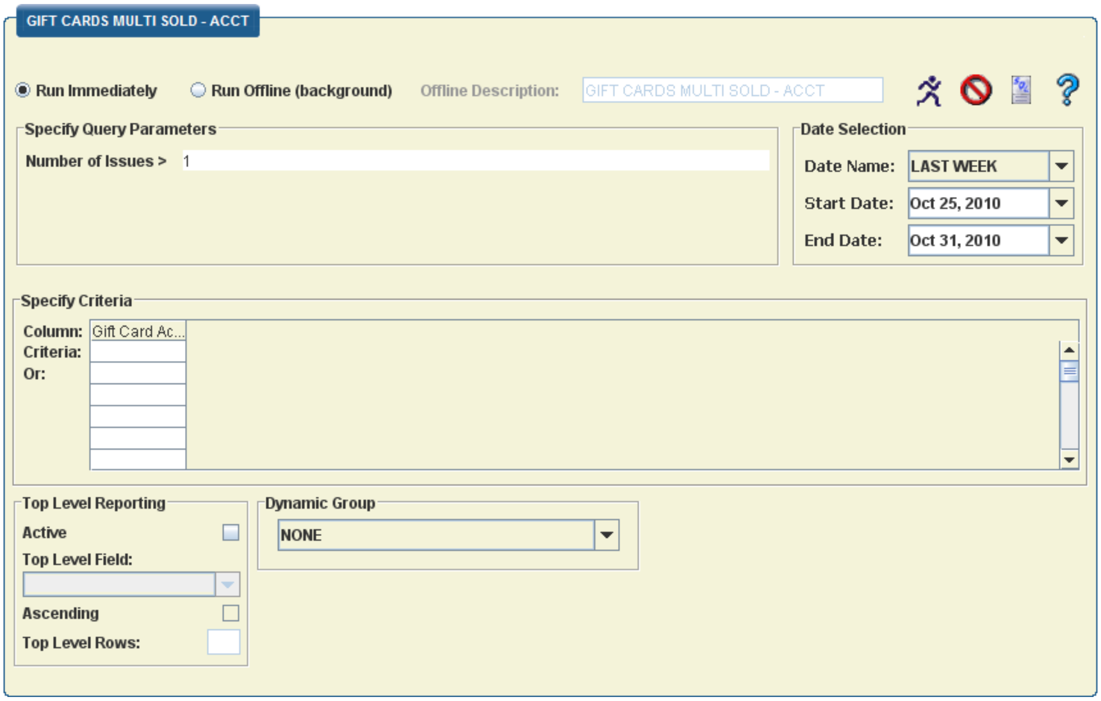
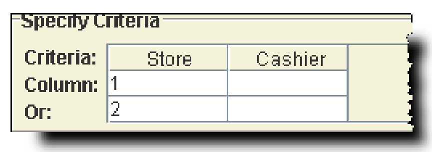


Figure 2-4: Specify Query Parameters - Multi Use

Specify Criteria

The **Specify Criteria** section allows you to pre-filter a query using report fields in an effort to narrow the query results. For example, instead of displaying data for all stores within your organization, you can enter specific store(s) to view in the query results.

The criteria shown to the right reports all credit card activity for stores 1 and 2.



The criteria show to the left reports all credit card activity for cashiers 22334455 and 66778899.

The parameters, date selection, and criteria in the figure below Reports all Noncash Refunds & Exchanges greater than $100 for Store 15 for last 30 days. The down arrow on the Tender Type box indicates a Lookup.

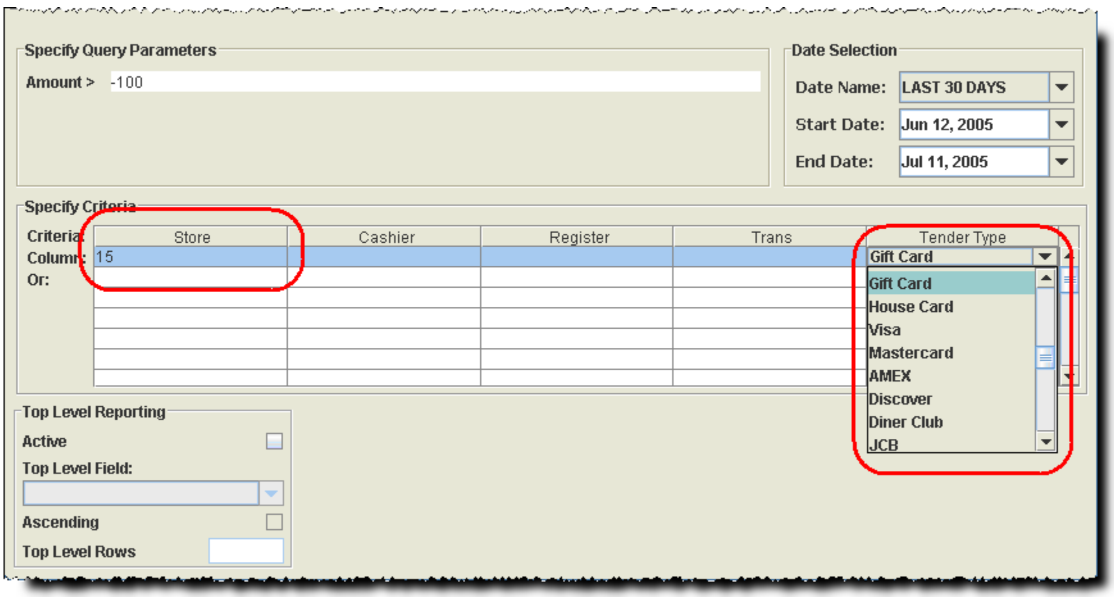


Figure 2-5: Specify Criteria - Lookup

Lookup Tables translate database values into more meaningful text. In the example on the right, the text "Gift Card" will be listed in the query results instead of the database value, which could be "25."

Top X Level Reporting

The Top Level Reporting section allows you to display a certain number of top-level rows of data. Instead of running a query and getting back 500 rows of data you can limit the number and only display the top 25 rows based on a specific field in the query such as a count or amount.

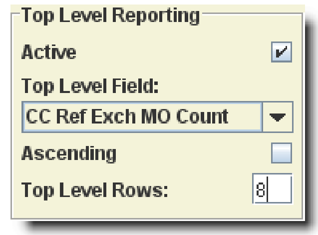
How to Select Top Level Reporting Options

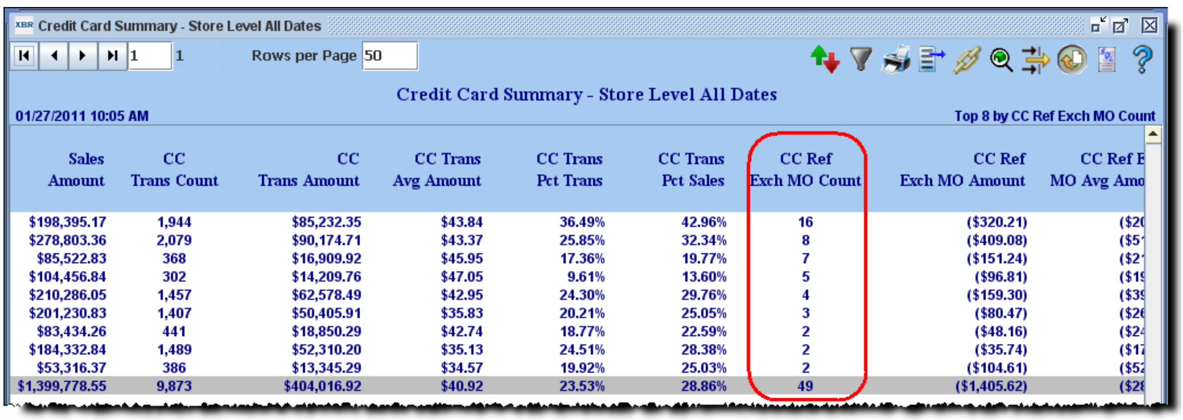
1. Check the **Active** box in the **Top Level Reporting** section when running an Adhoc.
2. Choose a field from the **Top Level Field** drop-down box. The field you select from the list will be the field that is filtered and will only return the number of rows as typed in the Top Level Rows: text box.
3. Select **Ascending** if you want the query results to be sorted in ascending order. Leave it unchecked if you want descending.

4. Type the number of rows you want returned for the query results in the **Top Level Rows** text box.

> The number of rows returned may be a few more than what you entered in the Top Level Rows number box. The reason is that the data may have duplicate values for the field that was selected in the top level reporting section.

Example: If you choose to return the top 8 rows of data for the field Credit Card Refund & Exchange MO Count (CC Ref Exch MO Count) in the *Credit Card Summary - Store* query, you may get 9 rows returned because there are 3 count values of 2. Instead of the application selecting which record to return it returns all records and you end up with the top 9 instead of the top 8.





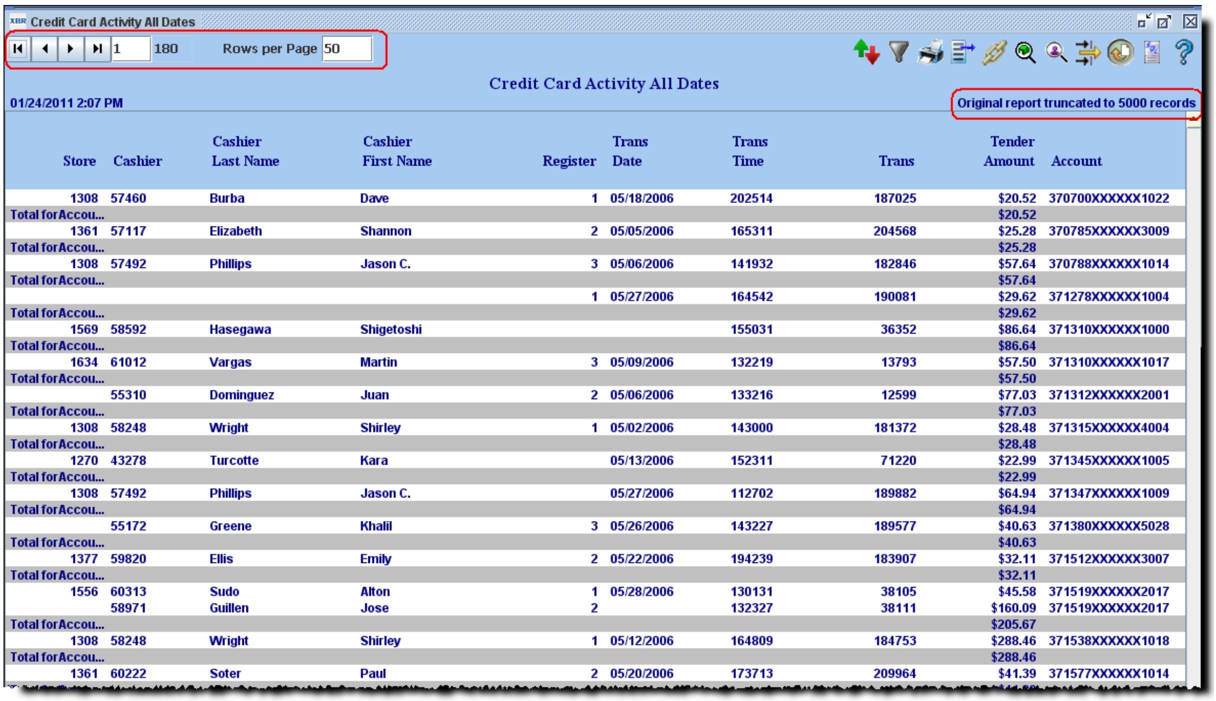
Sales Amount	CC Trans Count	CC Trans Amount	CC Trans Avg Amount	CC Trans Pct Trans	CC Trans Pct Sales	CC Ref Exch MO Count	CC Ref Exch MO Amount	CC Ref E MO Avg Amo
$198,395.17	1,944	$85,232.35	$43.84	36.49%	42.96%	16	($320.21)	($20
$278,803.36	2,079	$90,174.71	$43.37	25.85%	32.34%	8	($409.08)	($51
$85,522.83	368	$16,909.92	$45.95	17.36%	19.77%	7	($151.24)	($21
$104,456.84	302	$14,209.76	$47.05	9.61%	13.60%	5	($96.81)	($19
$210,286.05	1,457	$62,578.49	$42.95	24.30%	29.76%	4	($159.30)	($39
$201,230.83	1,407	$50,405.91	$35.83	20.21%	25.05%	3	($80.47)	($26
$83,434.26	441	$18,850.29	$42.74	18.77%	22.59%	2	($48.16)	($24
$184,332.84	1,489	$52,310.20	$35.13	24.51%	28.38%	2	($35.74)	($17
$53,316.37	386	$13,345.29	$34.57	19.92%	25.03%	2	($104.61)	($52
$1,399,778.55	9,873	$404,016.92	$40.92	23.53%	28.86%	49	($1,405.62)	($28

Figure 2-6: Top Level Reporting

Exceeding the Row Limit

Occasionally the retrieved data may exceed the row limit. When this happens, the report will be truncated to the limit and a note to this effect is placed in the report under the Report Title and to the right (Figure 2-7).

> Please contact your database administrator or system administrator to determine the row limit and increase it if necessary.


Credit Card Activity All Dates

1 180 Rows per Page 50

Credit Card Activity All Dates

01/24/2011 2:07 PM

Original report truncated to 5000 records

Store	Cashier	Cashier Last Name	Cashier First Name	Register	Trans Date	Trans Time	Trans	Tender Amount	Account
1308	57460	Burba	Dave	1	05/18/2006	202514	187025	$20.52	370700XXXXXX1022
Total forAccou...								$20.52	
1361	57117	Elizabeth	Shannon	2	05/05/2006	165311	204568	$25.28	370785XXXXXX3009
Total forAccou...								$25.28	
1308	57492	Phillips	Jason C.	3	05/06/2006	141932	182846	$57.64	370788XXXXXX1014
Total forAccou...								$57.64	
				1	05/27/2006	164542	190081	$29.62	371278XXXXXX1004
Total forAccou...								$29.62	
1569	58592	Hasegawa	Shigetoshi			155031	36352	$86.64	371310XXXXXX1000
Total forAccou...								$86.64	
1634	61012	Vargas	Martin	3	05/09/2006	132219	13793	$57.50	371310XXXXXX1017
Total forAccou...								$57.50	
	55310	Dominguez	Juan	2	05/06/2006	133216	12599	$77.03	371312XXXXXX2001
Total forAccou...								$77.03	
1308	58248	Wright	Shirley	1	05/02/2006	143000	181372	$28.48	371315XXXXXX4004
Total forAccou...								$28.48	
1270	43278	Turcotte	Kara		05/13/2006	152311	71220	$22.99	371345XXXXXX1005
Total forAccou...								$22.99	
1308	57492	Phillips	Jason C.		05/27/2006	112702	189882	$64.94	371347XXXXXX1009
Total forAccou...								$64.94	
	55172	Greene	Khalil	3	05/26/2006	143227	189577	$40.63	371380XXXXXX5028
Total forAccou...								$40.63	
1377	59820	Ellis	Emily	2	05/22/2006	194239	183907	$32.11	371512XXXXXX3007
Total forAccou...								$32.11	
1556	60313	Sudo	Alton	1	05/28/2006	130131	38105	$45.58	371519XXXXXX2017
	58971	Guillen	Jose	2		132327	38111	$160.09	371519XXXXXX2017
Total forAccou...								$205.67	
1308	58248	Wright	Shirley	1	05/12/2006	164809	184753	$288.46	371538XXXXXX1018
Total forAccou...								$288.46	
1361	60222	Soter	Paul	2	05/20/2006	173713	209964	$41.39	371577XXXXXX1014

Figure 2-7: Record Limit Exceeded

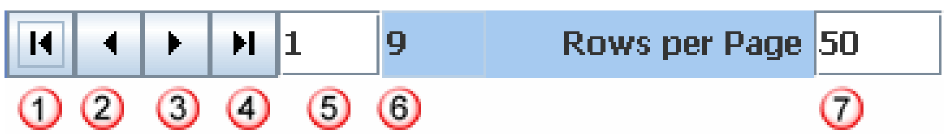
Query Report

Report rendering in the Web Application provides usability for report analysis, navigation, and manipulation. Some of the features include:

- Each report is rendered in its own full screen window.
- The user has the ability to change the order of the report columns.
- The user has the ability to change the width of the report columns.
- Multiple reports can be opened simultaneously.
- The user can easily switch between reports.
- Page navigation buttons are provided to browse content that spans multiple pages.

Report Navigation

If a report is more than 1 page, use the navigation controls shown below to navigate back and forth through the pages of the report.



1	Takes you to the first page of the report.
2	Takes you to the previous page of the report.
3	Takes you to the next page of the report.
4	Takes you to the last page of the report.
5	Tells you what page of the report you are currently on.
6	Tells you the total number of pages in the report.
7	Specifies the number of rows per page. You can change this to any number between 10 and 5000.

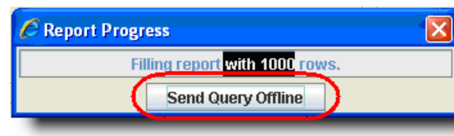
Closing the Report Window

If a query was run and you wish to close the query report, click on the **Close** button located in the upper right section of the report window.

How to Close the Query Report Window

1. After selecting a query, click the **Close** button ☒ .
2. The **Query** window will close.

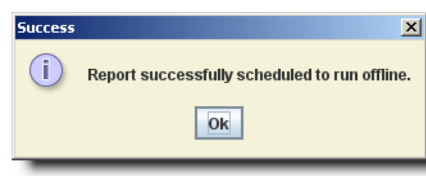
Switch from Running a Query to Sending it Offline



Users can decide to send a query offline while the query is running midstream. This might occur if a query is taking longer to return results than expected. While the query is a running, a Report Progress window will appear accumulating the number of rows that are filling the report. Users just need to click the **Send Query Offline** button to change the run process midstream. Once the report has completed running offline, there will be a saved copy found in the My Reports link from the application menu.

How to Switch the Run Process from Immediate to Offline

1. Click the **Send Query Offline** button from the Report Progress window. This window will appear after a user has clicked the **Run** button for a selected query. A popup window will appear telling you that the report was successfully scheduled to run offline.



2. Click the **My Reports** link from the Application menu.

Adhocs that run Offline are saved in the My Reports link.

3. Double click the applicable Adhoc report name to view results.

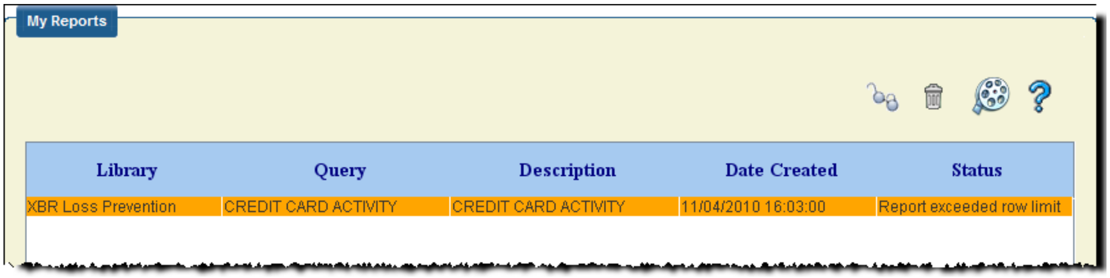


Figure 2-8: My Reports

Running a Graphed Query

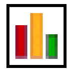
If a graph has been created for a query, query results can be viewed in a report format or a graph format. A graph icon  will appear next to the query name in the Query List view.

Figure 2-9: Graphed Query in the Query List

Running a Graphed Query

How to Run a Graphed Query

1. Double-click on the graphed query you wish to run from the Query List view. You can also click on the query name and click the **Run** button.

> TIP — *For graphed queries, it is helpful to narrow the results by entering pre-filter criteria. Graphs are more legible if there is less data to display.*

2. Enter desired Run criteria.

3. Click the **Run** button. The graph is displayed in a pop up window with the report view in the background.

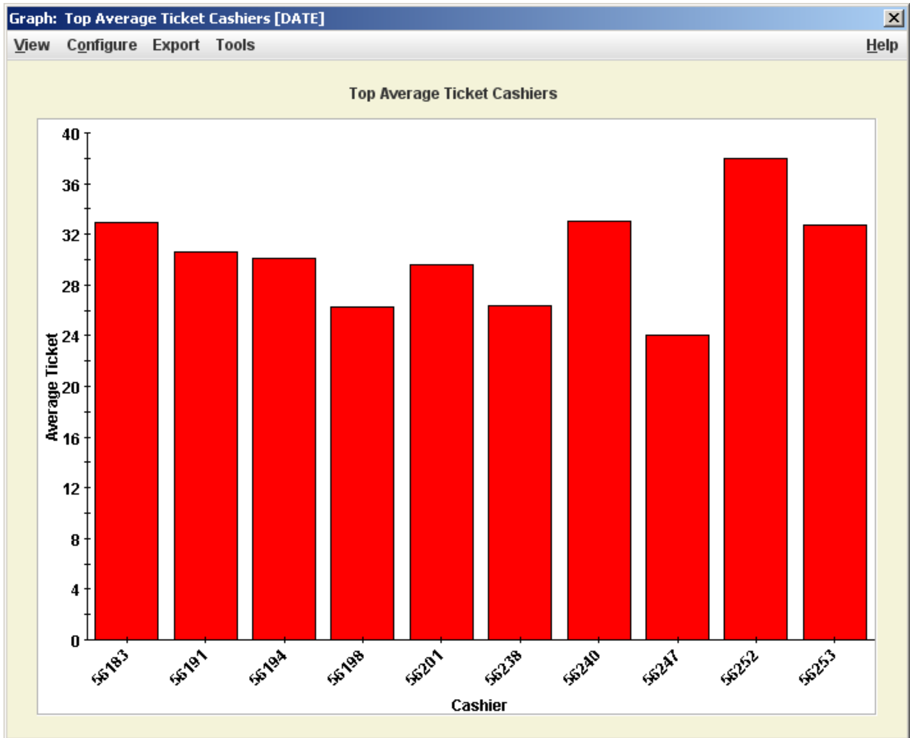


Figure 2-10: Bar Graph

4. To view the report view, click the **Close**  button in the upper right corner.

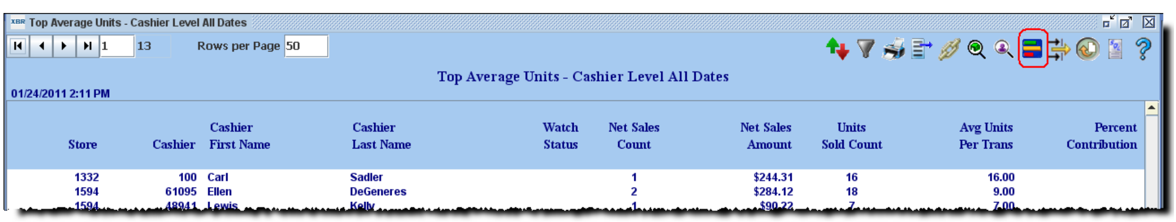


Figure 2-11: Report View - Graph Icon

5. Click the **Graph** Icon in the upper right section (Circled above) to switch from report view to graph view.
6. Click on the **View** menu to change the graph display. Toggle the following options on or off:

1	Chart Labels
2	Chart Legend
3	Chart Title

Click in the adjacent check box to display or not display the indicated options.

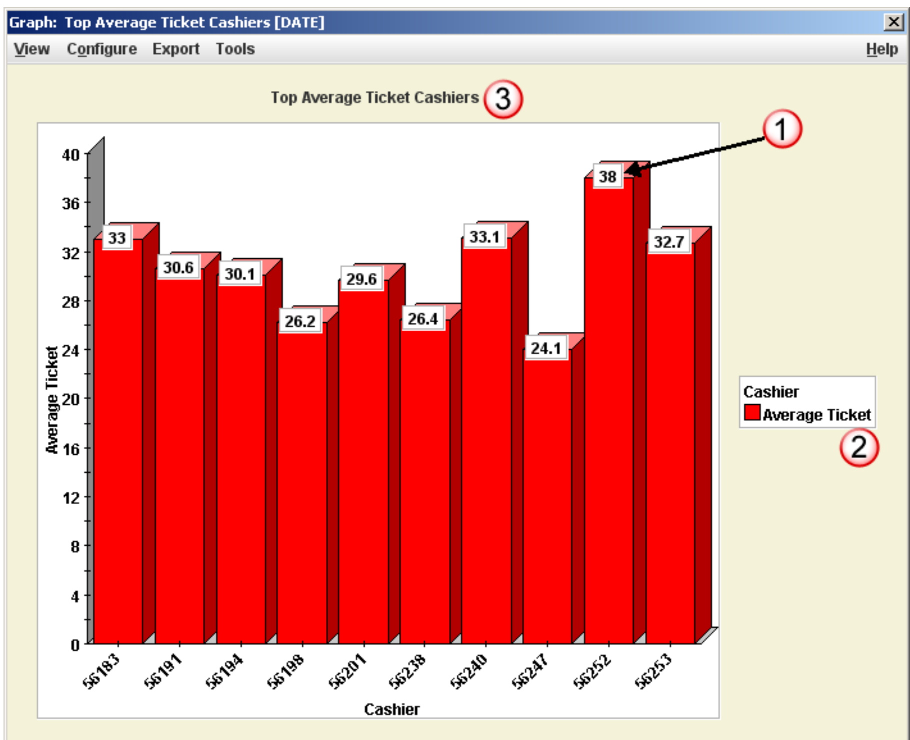


Figure 2-12: Bar Graph - Chart Options

7. The Configure Legend option allows you to select whether the legend is visible or not. You can also anchor the legend in various locations and change the legend orientation by selecting **Configure -> Configure Legend**.

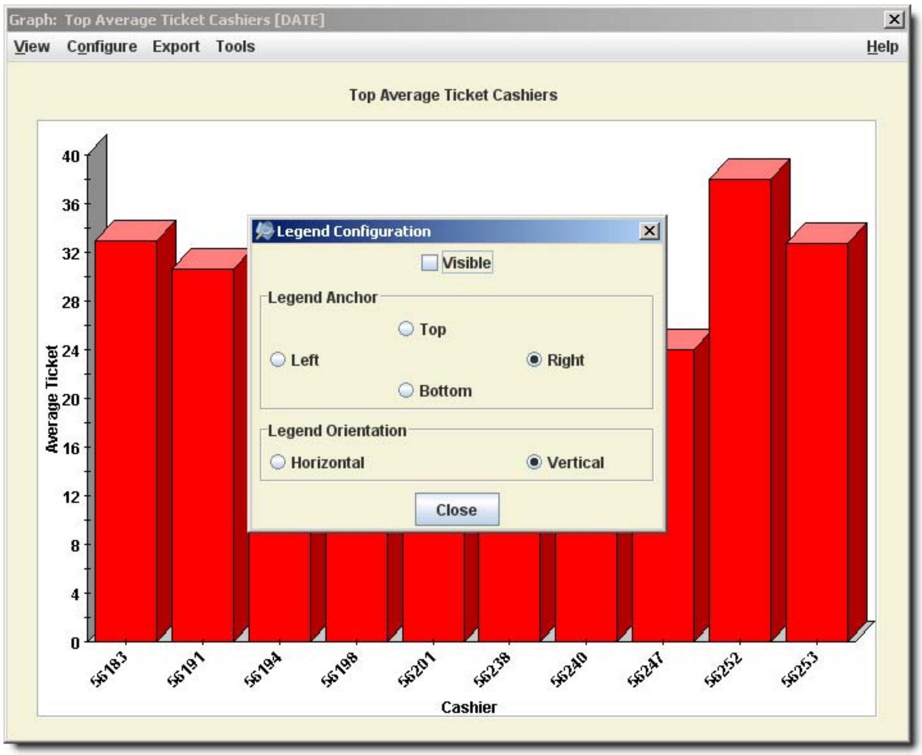


Figure 2-13: Bar Graph - Configure Legend

8. The **Configure Chart Type** option allows you select a different chart type and display the graph in a 3D view.

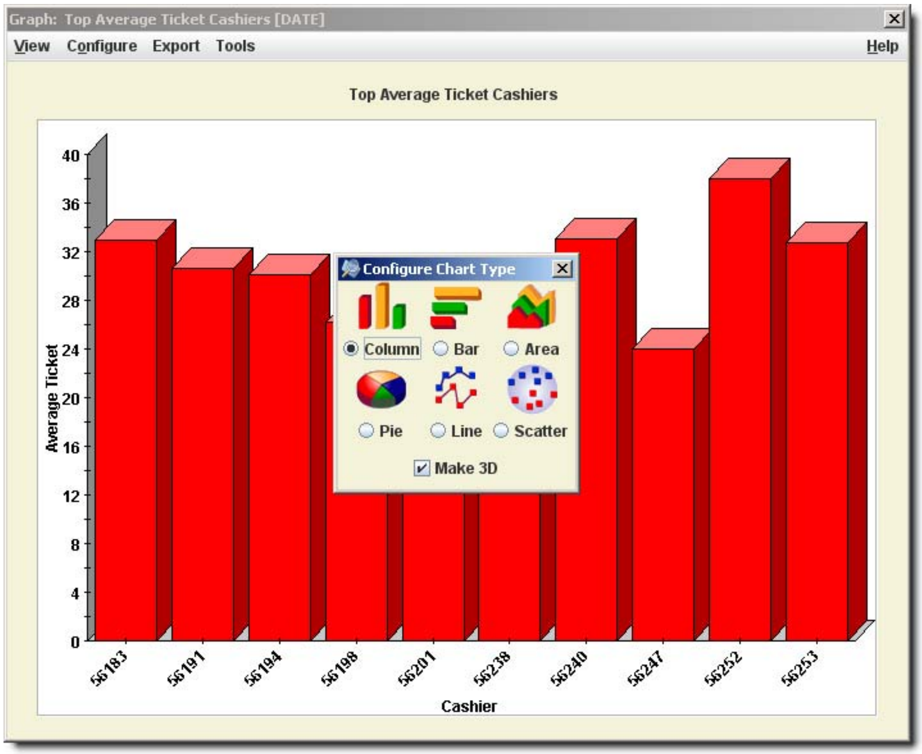


Figure 2-14: Bar Graph - Chart Types

Exporting a Graph

Graphs can be exported in a picture or object file format so they can be easily placed in other files such as PowerPoint presentations.

How to Export a Graph

1. While viewing a graph, click on the **Export** menu option and select **Export to File**.

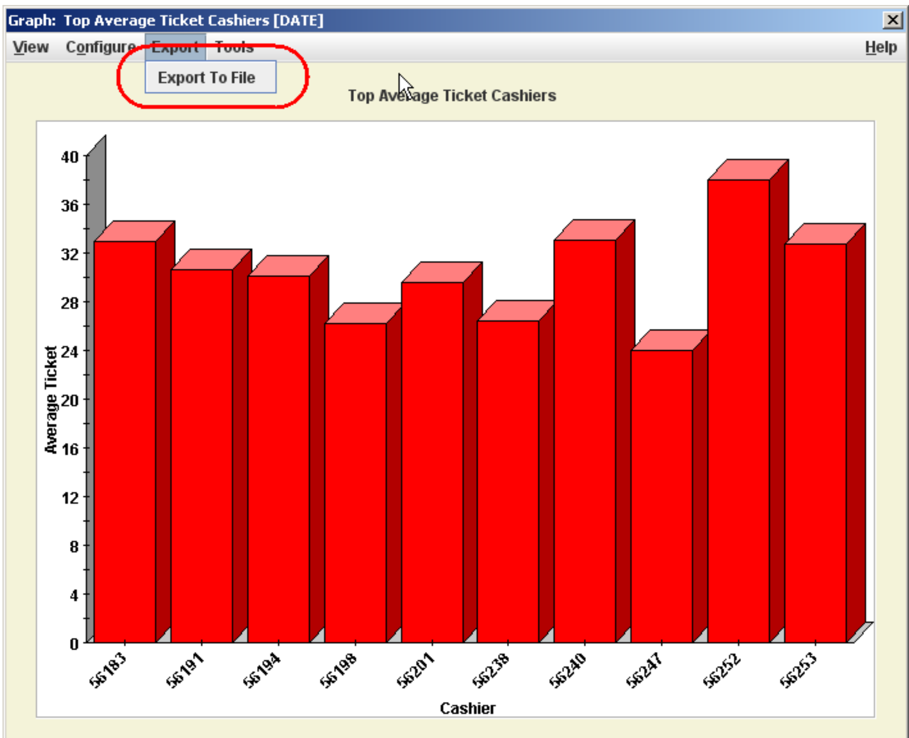


Figure 2-15: Bar Graph - Export to File

2. The **Save** window will appear. Select the desired file location from the **Save In** field and type a **File Name**.

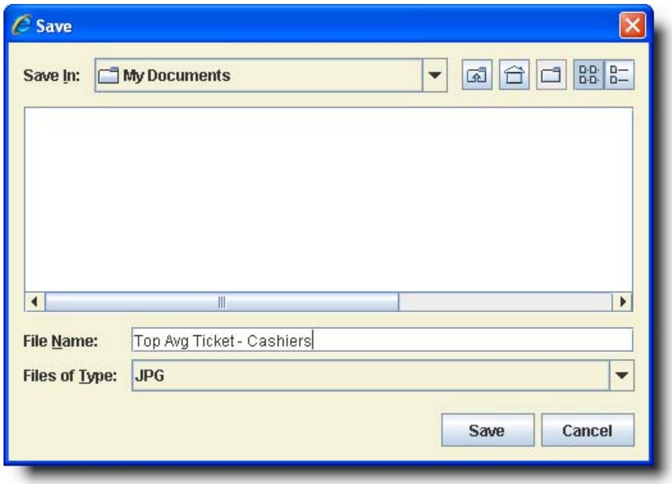


Figure 2-16:

3. Click the **Save** button.

Inserting a Graph into PowerPoint

How to Insert a Graph into Power Point

1. Launch the PowerPoint application and create either a new presentation or open an existing one using the File menu.
2. Click **Insert** on the menu and select **Picture/From Fil**e.

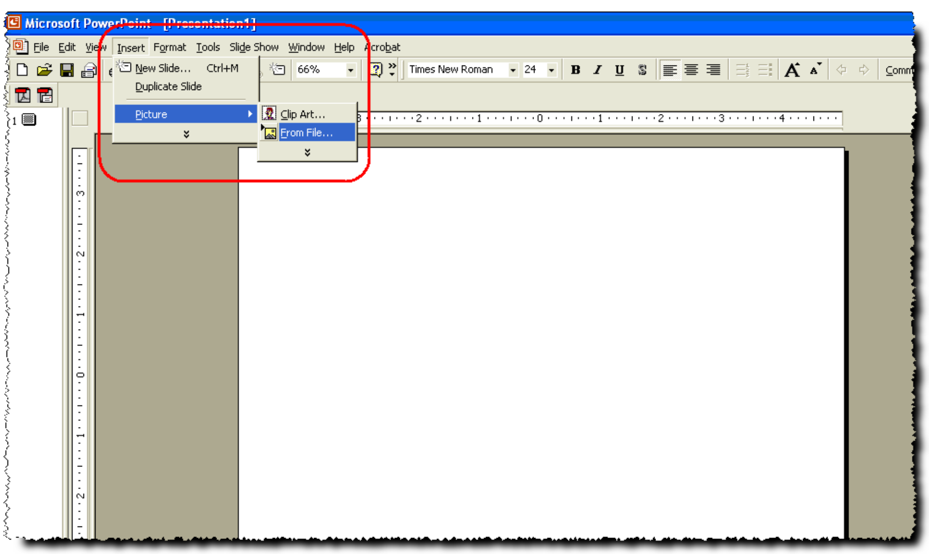


Figure 2-17: Power Point - Insert Picture/From File

3. Using the **Look In** field, navigate to the saved exported graph.

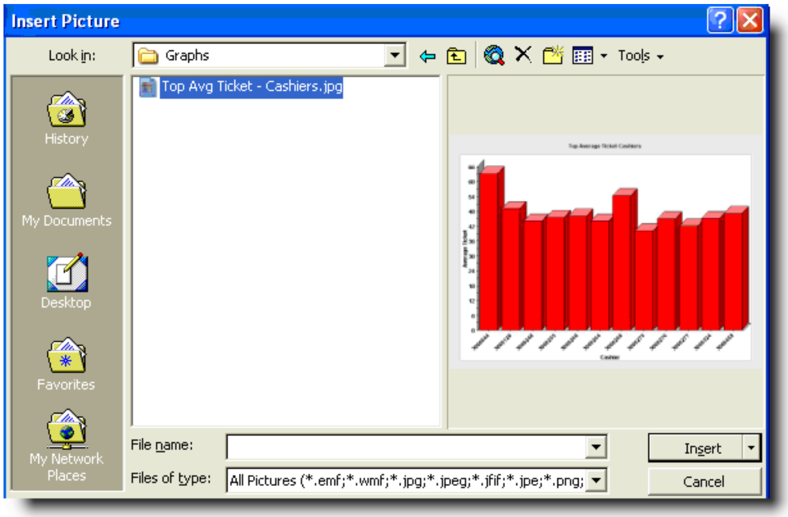


Figure 2-18: Power Point - Find File

4. Click on the graph name and click the **Insert** button. The graph will be placed on the current slide.

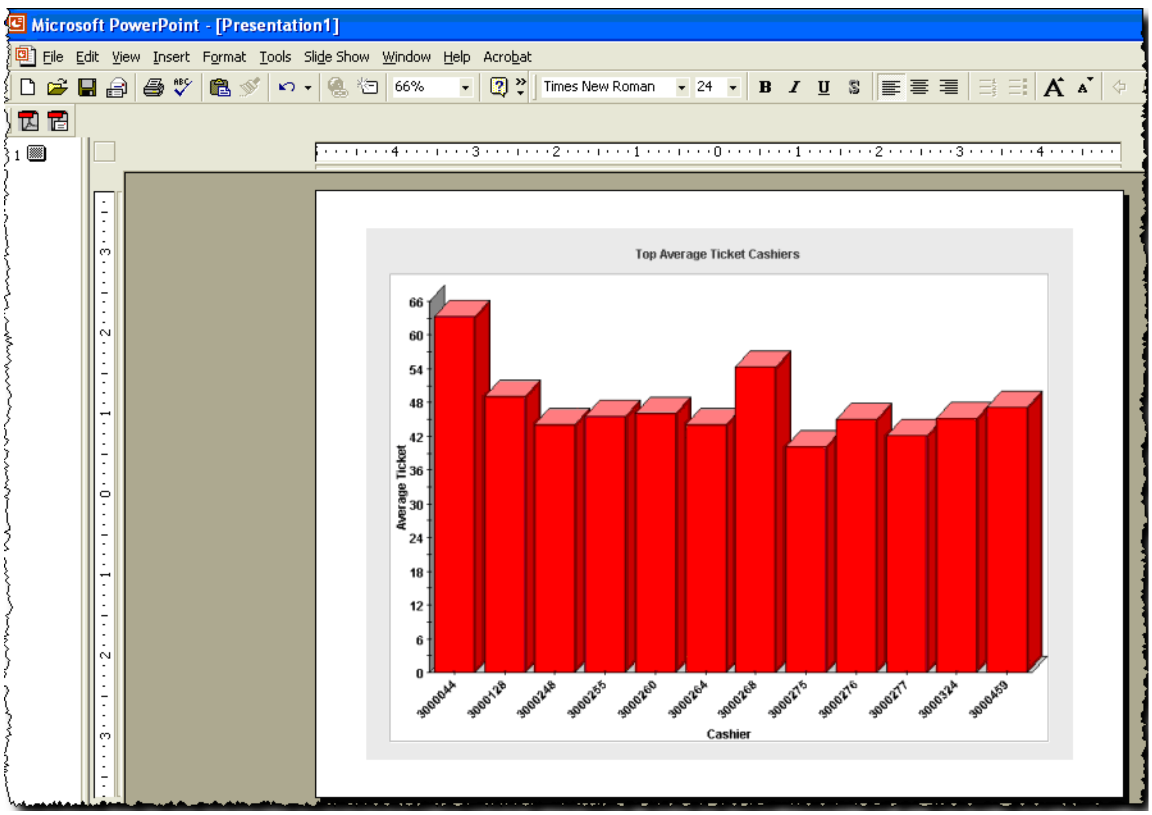


Figure 2-19: Power Point - Display

CHAPTER 3

Managing Query Results

Overview

Query results can be managed by sorting the data in ascending or descending order, filtering data to extract specific results and linking to other Adhoc queries for more detailed information. Sorting can occur within a single field or multi-level using the available fields within the query. Filtering can be accomplished using data values, text, lookups and wildcards. Both of these functions allow users to easily create customized and meaningful query results that can later be printed or exported for permanent referral.

When viewing query results, links are available to provide additional information based on the information users are viewing. Another feature when viewing query results is the ability to place a store or associate on 'watch' status. Various watch status' can be assigned, such as warning, watch or investigate, allowing users to monitor stores or associates who may have questionable or suspicious activity.

Learning Objectives

Upon completion of this section, you should be able to:

- Sort results in either ascending, descending, or multi-sort order
- Filter the data using values, text, lookups and wildcards
- Query Filter Display to display all criteria for the query
- Copy and Paste field data
- Link to other Adhoc queries for additional information
- Assign a watch status to a store or associate

> **!** *If you have multiple reports open and access another portal (i.e. Exceptions, Alerts, Query List, etc.), all report windows will be closed.*

SORTING

Sorting allows users to change the order of the records that appear in the query results. Each query has a default sort order. Changing the sort order of a query is a temporary function. When the query is closed and re-run again, the default sort order will be applied. System Administrators, System Managers and query owners can permanently change the sort order by modifying the underlying query in the Desktop environment. You can also perform a quick sort by clicking the column heading to sort by that column.

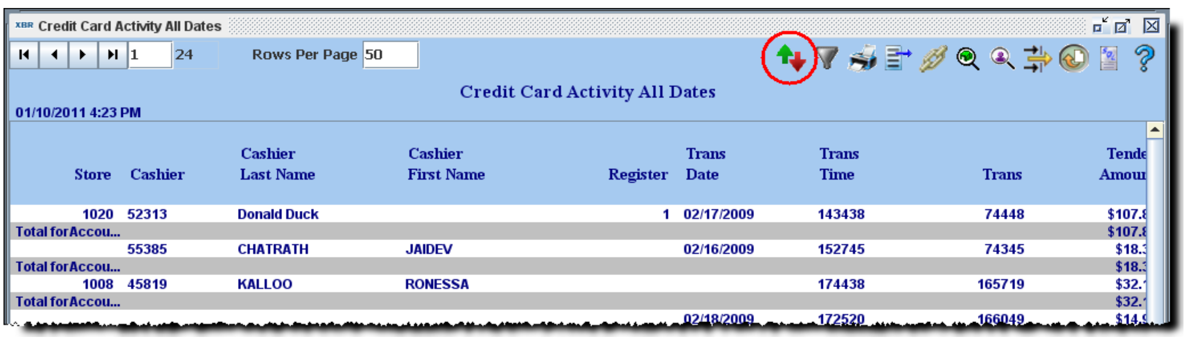
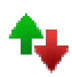
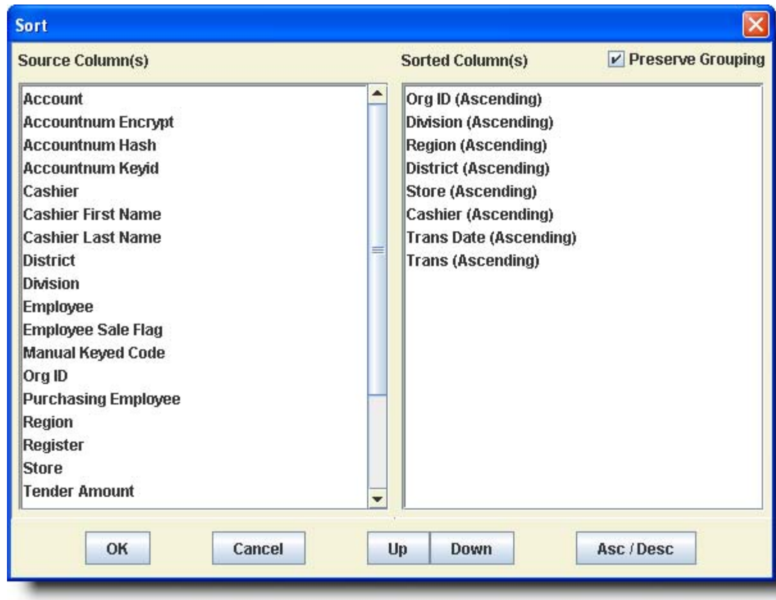


Figure 3-1: Query Report - Sort Button

How to Sort Query Results

1. When viewing query results, click the **Sort**  button. A **Sort** dialog box displays the current sort order for the query.

2. Double click on the columns to add or remove for sorting. Double clicking on the left, **Source Column(s)** area will add the field to the sort. Double clicking on the right, **Sorted Column(s)** area will remove the field from the sort.



3. Click on a Sorted Column field name and click the **Asc / Desc** button to sort in ascending or descending order.

   To change the priority of the sort order, click on a **Sorted Column** field name and click the **Up** or **Down** button to change the sort order priority.

> If **Preserve Grouping** is checked, then the sort order will group the data by a particular field that has the option **Break On** selected. When the value of the field that has this option turned on changes, the sort is reapplied to the next group.
>
> The **Break On** option is set up in the in the Desktop application on the Total tab of Adhoc Maintenance window.
>
> **Example:** If **Break On** is selected for Store Number and the Sort order is set to Store Number, Trans amount and Trans Time; subtotals will be calculated whenever the value in this field changes (breaks). For example, selecting this option for STORE would cause subtotals to be created for each change in Store Number. Turning off Preserve Grouping would remove the breaks when the data changes.

4. Click **OK**.

FILTERING

Filtering allows users to focus on a specific result of the query once the query has run. For example, a user may have run a Post Voids by Cashier query and decided that a few cashiers with seemingly excessive Post Voids need further review. Rather than reading and printing the entire query, users can create a filter to focus on the cashiers with a higher number of post voids to investigate. If a user selected Top-level Reporting when they originally ran the query, the Top Level Reporting option appears active in the Filter dialog box. Users can deactivate it at this time and create a new filter for all of the data. If a user creates a filter with the Top-level reporting active the application will first filter all the data based on the filter that was created and then it will apply the Top level reporting criteria within the filtered data.

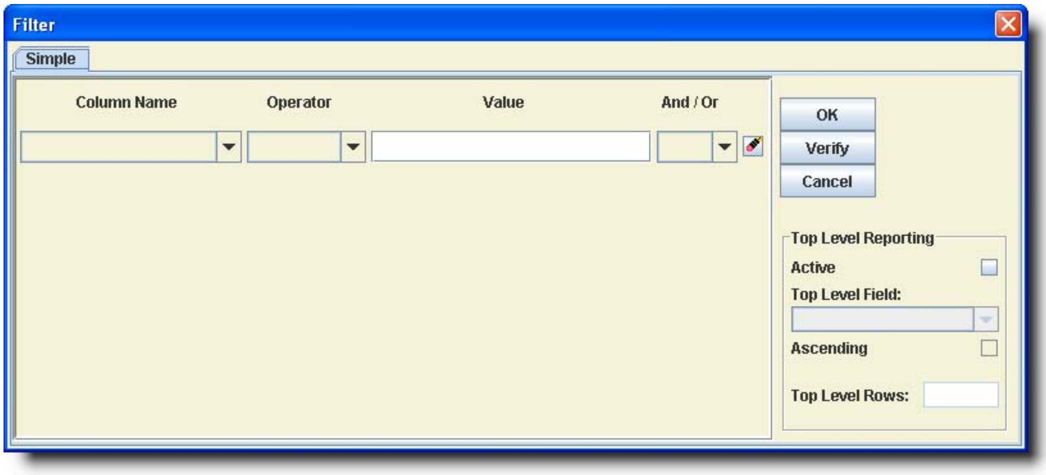


Figure 3-2: Simple Filter

How to Filter Query Results

1. When viewing query results, click the **Filter**  button.
2. In the **Column Name** area, select the column on which you will base your filter.
3. In the **Operator** area select an expression (=, <, >, >=, in, not in, etc.).
4. In the **Value** area, type the desired value(s).
5. **[OPTIONAL]** Select either “and” or “or” to add another filter.
6. **[OPTIONAL]** Repeat steps 2 - 4 to complete an additional filter.
7. **[OPTIONAL]** Activate the **Top Level Reporting** check box to display the top-level records based on a certain field.
   a. Choose a **Top Level Field** on which to report top-level data.
   b. Select **Ascending** or leave blank for descending.
   c. Type the number of rows to be returned in the **Top Level Rows** box.
8. Once you have added all necessary filters, click **OK** to display your changes.

Simple Filter

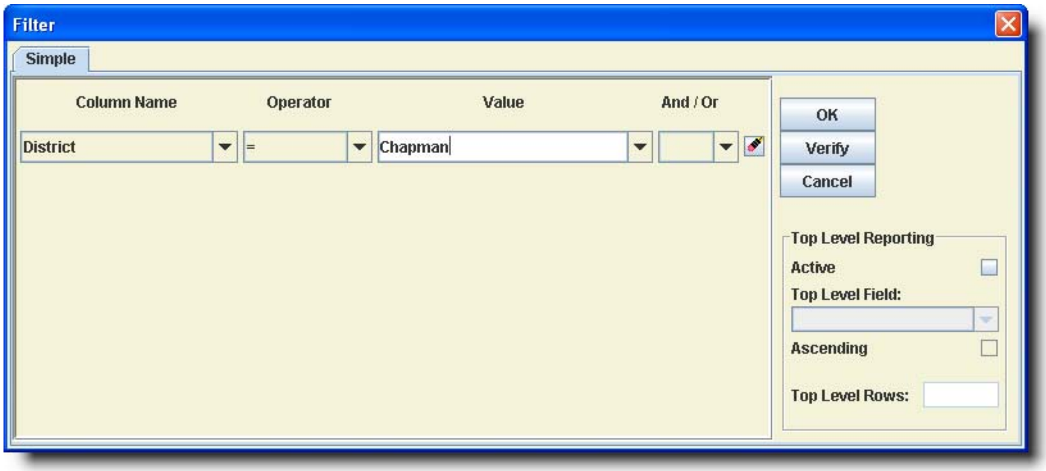


Figure 3-3: Simple Filter

> If the **Top Level Reporting** option was activated, the Simple filter is applied first for all of the data and the Top Level Reporting filter is applied next within the filtered data.

Combining Filters with Top Level Reporting

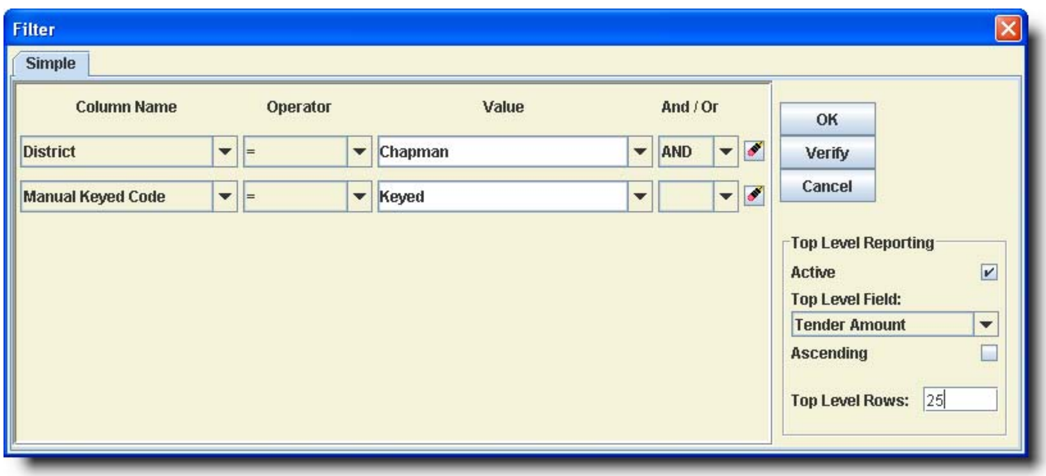


Figure 3-4: Combine Filters with Top Level Reporting

Filtering using a Wildcard

Wildcards are used to help filter data when the complete value is unknown. For example, a cashier's name may be unknown but users may know the first few characters or users may have part of an account number that they would like to retrieve data for. The wildcard symbol used is the "%" symbol.

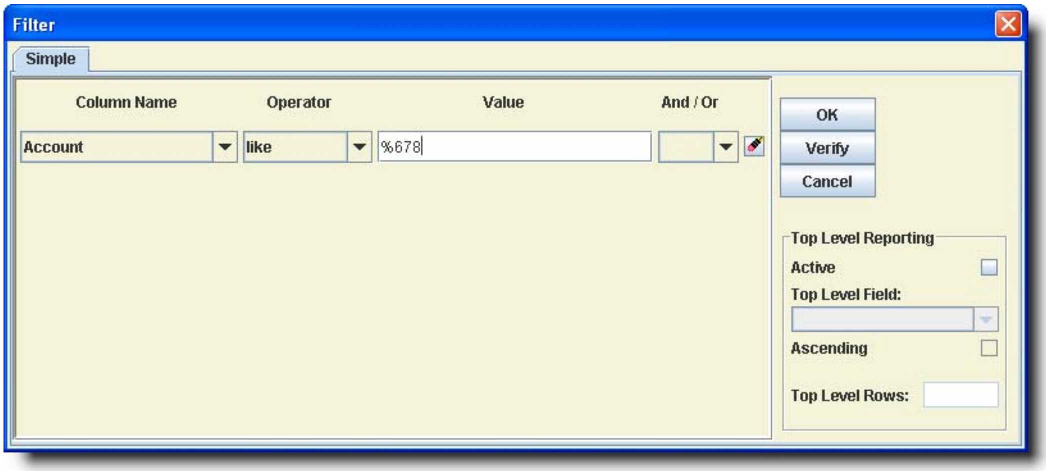


Figure 3-5: Filter Using Wildcard

Filtering on Lookup Values

Lookup tables are used to convert data values to display text. Fields such as tender types, reason codes, and swipe flags are often listed in tlog files as cryptic codes. Analytics converts these codes into meaningful text descriptions in the query results using a Lookup. When filtering on a Lookup, the Value field displays a down arrow that allows users to easily select the appropriate options for the filter.

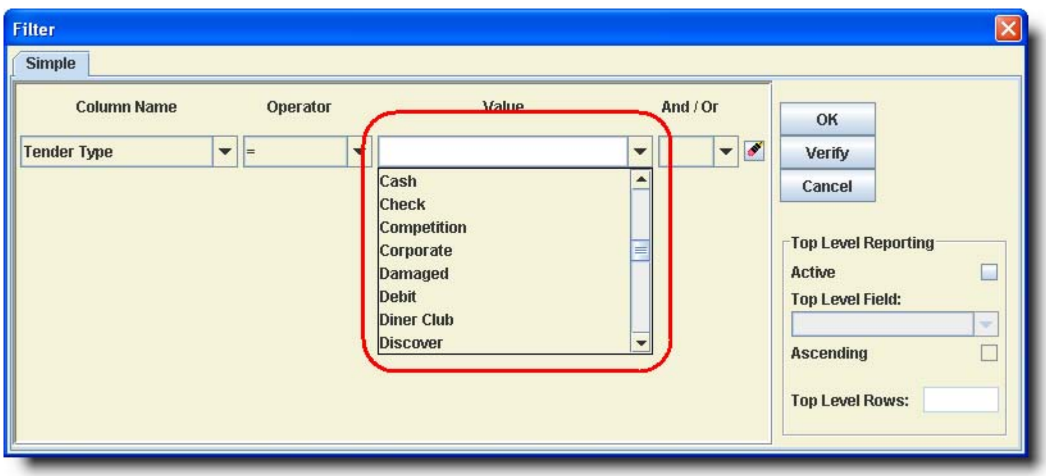


Figure 3-6: Filter on Lookup

Clearing a Filter

Original query results can be re-displayed by clearing any existing filters. *Don't take the time to exit the query and re-run it!* Simply click the **Filter** button then click the **Erase** button for each filter that has been created. Click **OK** to display the original query results.

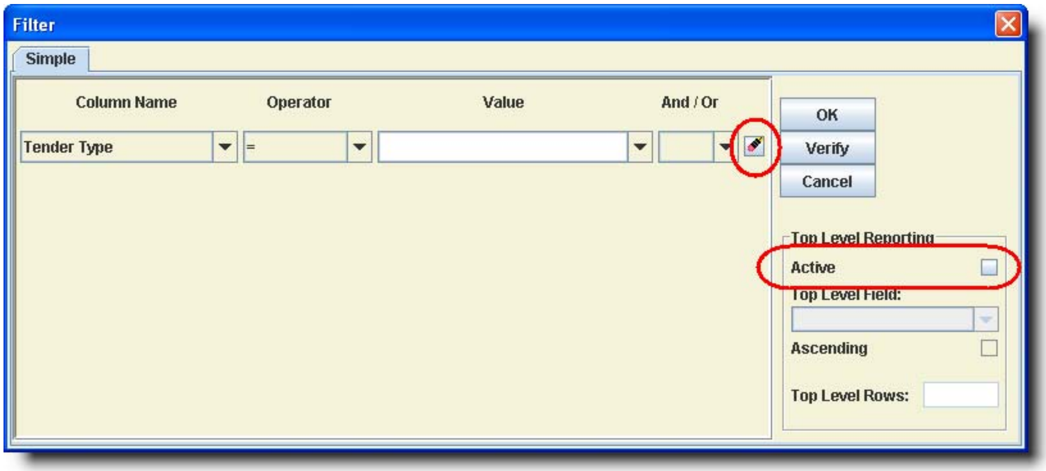


Figure 3-7: Clear Filter

If **Top Level Reporting** was selected before running a query, this filter can be cleared as well via the Filter function. Inactivate the **Top Level Reporting** by de-selecting this option in the Filter window. All rows of data will be returned if no active filter exists. The **Top Level Reporting** filter can be re-activated at any time using the Filter function.

Common Filters

This Filter….	Reports This Information:
Store number = 11	Store 11 only.
Store number in (4, 6, 39)	Stores 4, 6, and 39
Refund amount < -150	Refunds over $150. Remember to include the dash to indicate a negative value
Goal % > 5%	All Stores, regions, or districts that exceeded their goal dollars by more than 5%.
Trans Date > 10/01/05	Transactions after October 1, 2005.
Cashier Name like 'Sau%'	Cashier Names that begin with "Sau". Character fields are case-sensitive in this filter option. If cashier names have the first letter capitalized and the remaining characters in lowercase in the report, then the value needs to be typed in the same way for the Store Analytics database to return any values
Account like '%9455'	Credit card activity with credit card account numbers ending with the digits "9455"
Account like '6011%'	Credit card activity with credit card account numbers beginning with the digits "6011"

Operators Used in Filters

Some of the most common filtering commands are:

< >	Not equal to
=	Equal to
<	Less than
<=	Less than or equal to
>	Greater than
>=	Greater than or equal to
In ()	Used to list a group of valid values e.g. Store num in (1,5,7,8) Note that parentheses are used around multiple values.
Not In ()	Used to exclude a group of values e.g. Store num not in (2,3,4,6) Note that parentheses are used around multiple values.
Between	Used to specify a range of valid values. e.g. Store num between 1 and 8
Like	Used as a wild card to return similar values e.g. SKU like 123% would display all SKUs beginning with 123 and ending with anything.
Not Like	Used as a wild card to exclude similar values e.g. SKU not like 123% would return all SKUs that did not begin with 123.
And	Used to combine filters. Each row that appears on the query must meet the criteria of each filter combined with And. e.g. Refund_amount < - 50 and Store num = 16 would return all refunds greater than $50 that occurred in Store 16.
Or	Used to combine filters. Each row that appears on the query must meet the criteria of at least one filter combined with OR. e.g. Store num = 3 or Store num = 16 would return all rows from Store 3 and Store 16.

Combining Filters

You can combine filters to further narrow down the data. You can use the AND or OR statements in a filter.

Connecting Filters by AND

In order for data to appear on your query, it must meet the criteria of **ALL** filters connected by and.

If you create a filter like this:

Store = 15 AND number of units > 10

These lines *would* appear on your report:

Store	Trans Date	Number of Units	Total Amount
15	1/1/08	11	$2200
15	1/2/08	15	$1500

These lines *would not*:

Store	Trans Date	Number of Units	Total Amount
15	1/1/08	10	$1000
20	1/2/08	15	$1500

Connecting Filters by OR

In order for a line to appear on your report, data must meet the criteria of **at least one** filter connected by or.

If you create a filter like this:

Store = 15 OR number of units > 10

These lines *would* appear on your report:

Store	Trans Date	Number of Units	Total Amount
15	1/1/08	11	$2200
15	1/1/08	8	$800
18	1/2/08	12	$3600

These lines *would not*:

Store	Trans Date	Number of Units	Total Amount
5	1/1/08	10	$1000
20	1/2/08	5	$1500

REPORT CONTENTS

Change Order of Report Columns

> Changing column order is temporary. The next time the same query is run, the column order will be in its original state.

Use the following steps to change the order of the columns in a query:

How to Change the Order of the Columns in a Query Report

1. In the query report, click and hold the left mouse button in the column header of the column you want to move.

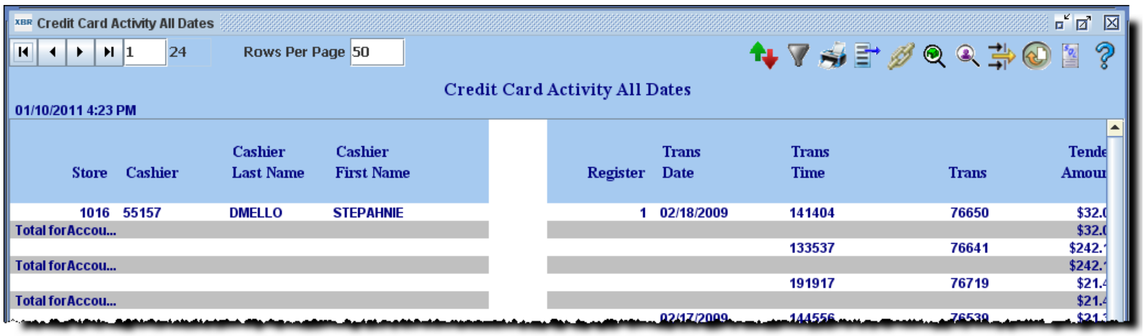


Figure 3-8: Change Column Order

2. Drag the column left or right to the desired location.

> As you drag the column over an adjacent column, at the halfway point, the adjacent column will move in the opposite direction you are moving the mouse so that, if desired, you can drop the column being moved.

3. Release the left mouse button. The dragged column will settle into its new location.

Change Width of Report Columns

Changing column width is temporary. The next time the same query is run, the column width will be in its original state.

Data in the report columns does not wrap when column width is decreased. Take care not to truncate data when decreasing column width.

Use the following steps to change the width of a column in a query:

How to Change the Width of a Column in a Query Report

1. In the column whose width is to be changed, slowly move the mouse pointer to the right of the column header until the pointer changes into a double-headed arrow (see below).

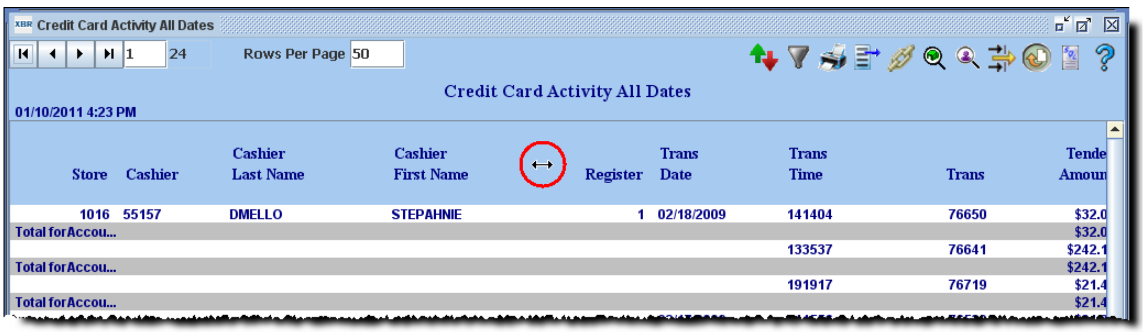
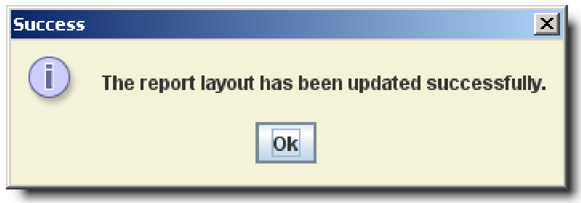


Figure 3-9: Change Column Width

2. Click and hold the left mouse button.
3. Drag the pointer left to decrease the width of the column or right to increase the width of the column.
4. When the desired column width is reached, release the left mouse button

Saving Report Layout Changes

System Administrators, System Managers and Query Owners can permanently save their report layout (column order and column width) changes by clicking the Update Report Layout  icon.



Otherwise, these changes will be temporary in nature and the next time the report is generated, the column order and width will be in their original state.

Copy Cell Contents

It is possible to copy the contents of one or more cells in a query report and paste the contents into another application such as a word processor or spreadsheet.

Use the following steps to copy the contents of one or more cells in a query:

How to Copy the Contents of One or More Cells in a Query Report

1. For a single cell, left-click the mouse pointer on the piece of data you want to copy.

For multiple cells, click and hold the left mouse button on the first piece of data you want to copy, drag the mouse pointer to the last piece of data you want to copy, and release the left mouse button.

> When selecting cell(s) to copy, there is no visual indication that the cells are selected. Make sure you click directly on top of the data you want to copy.

2. Press **[Ctrl]-[c]** to copy the selected data.

3. Move to your other application (word processor, spreadsheet, etc.) and press **[Ctrl]-[v]** to paste the data.

ADHOC LINKING

Linking allows users to review associated queries based on the results of another query.

Linking to Queries

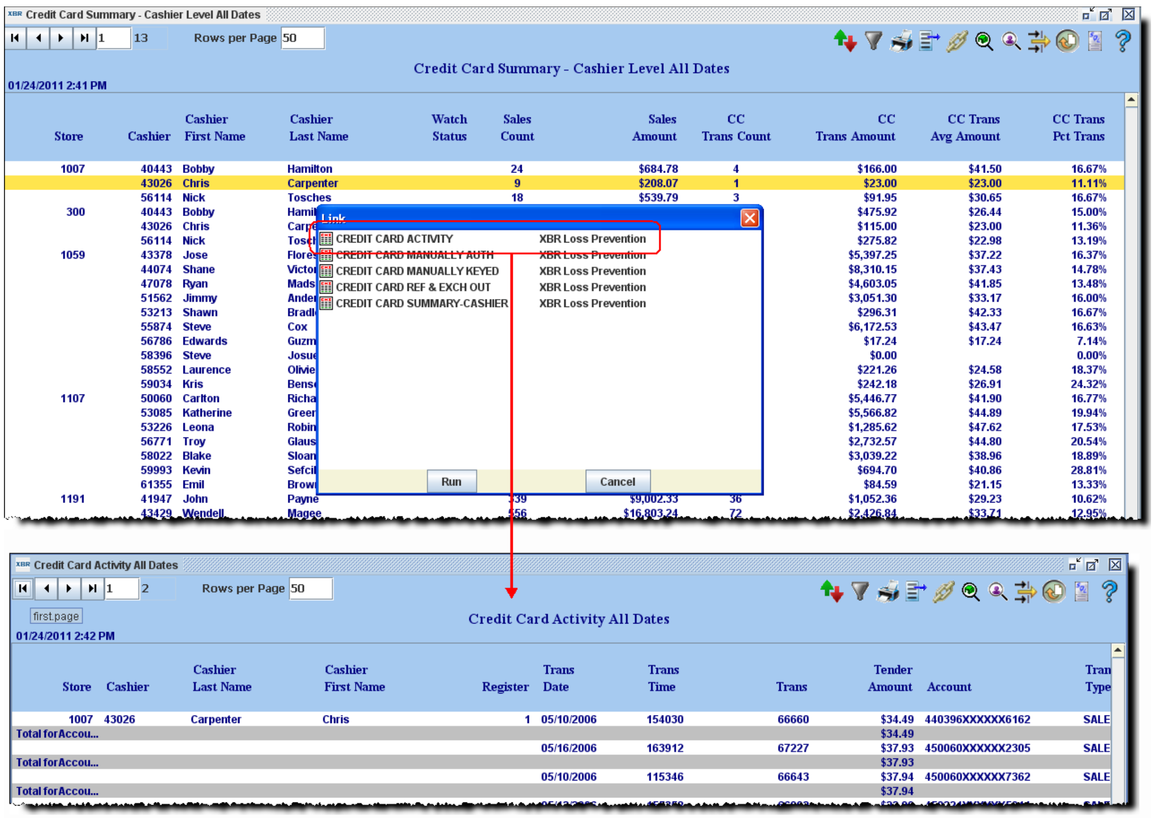


Figure 3-10: Linked Queries

When reviewing query results, users can link to another query if the **Link**  button is displayed. Queries can be linked to each other if there is at least one common field shared between them.

How to Link to Another Query

Link to another Query

Double-click a row in your query. When a query is selected to link to, the information within this row will be represented in the linked query.

Link on multiple rows that are non-adjacent:

1. Click the first row of data to research further.
2. Hold the **[CTRL]** key while clicking each additional row to research.

3. Release the **[CTRL]** key once all rows are selected.
4. Click the **Link** button.

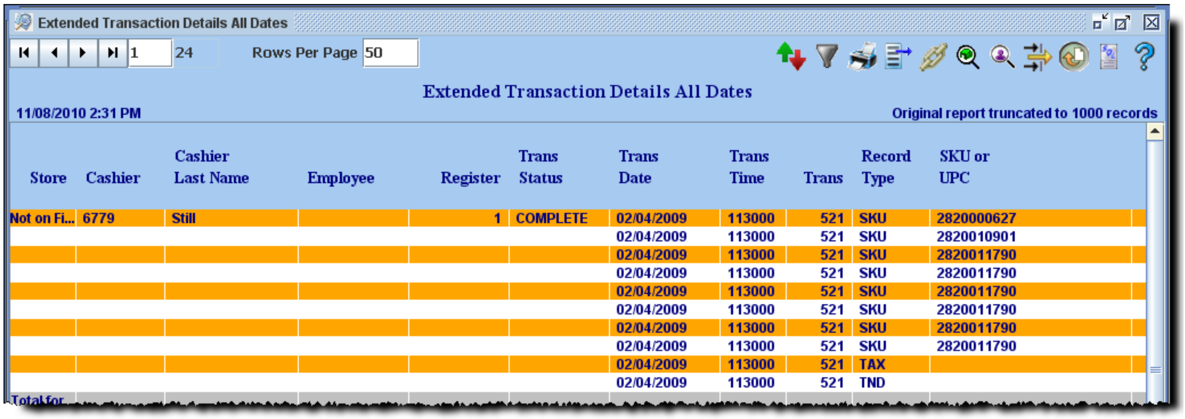


Figure 3-11: Multiple Non-Adjacent Rows

Linking on a list of adjacent rows:

1. Click the first row of data to research further.
2. Hold the **[SHIFT]** key while clicking the last row to research.

3. Click the **Link** button.

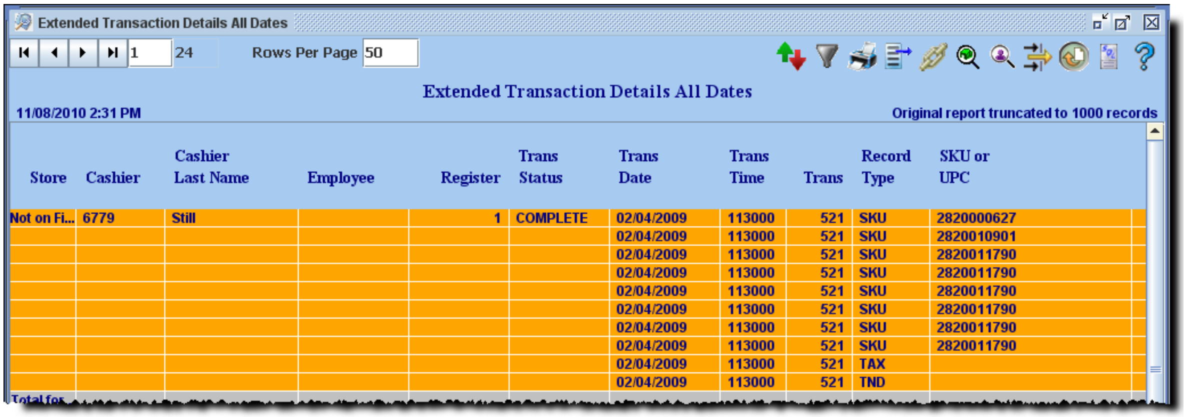
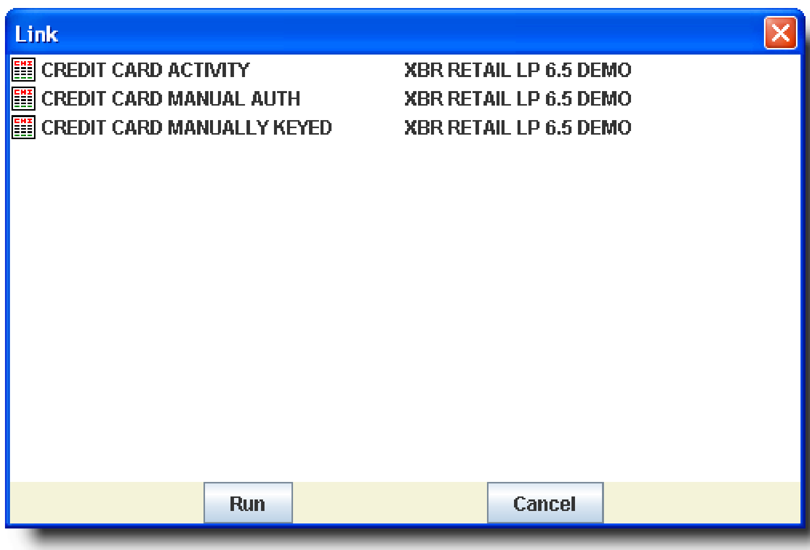


Figure 3-12: Multiple Adjacent Rows

- When linking, Analytics will go directly to the next query if there is only ONE query to link to.
- When there is a choice of queries to link to, a selection list is displayed similar to the one shown to the right. Double-click the query to link to or select it and then click the **Run** button.



- Depending on the options defined for the link, there may be a prompt for a date range or criteria for the linked query.
- The linked query results display in their own window separate from the original query results window. Use the taskbar to switch back and forth between the queries.
- The linked query results have the same functionality as the original results, including sort, filter, print, export, and the ability to link to additional queries.
- To exit any query results, click the **Close** ☒ button.

Linking to Video

The Video Link feature allows access to video for suspicious looking transactions that may be uncovered in XBR. When users link transactions to the video link, the transactions are automatically stored temporarily in the "Video Queue". Users have the option to save video links permanently by archiving them, thus creating a shortcut to the media clip for selected transactions. When the video links are archived, they are stored in a “Video Archive" that can be accessed from the Query List.

TIP

Video Links can only be accessed from queries built at Detail data levels (Header data levels as well for Retail and Grocery users) and most likely include the following standard fields in the report build:

- *Store*
- *Register*
- *Transaction Date*
- *Transaction Time*
- *Transaction Number*

Users can link to a Detail level report, from any other data level, in order to view the media clip for a selected transaction(s) or they can run the applicable report directly from the Query List.

Execute a Video Link from a Query

Use the following steps to link to a video from a query:

1. In the Query List, select and run a query.
2. From a header or detail query window, select and double-click a single row;

   or

   select multiple rows and click the Link icon. The Link dialog box appears.

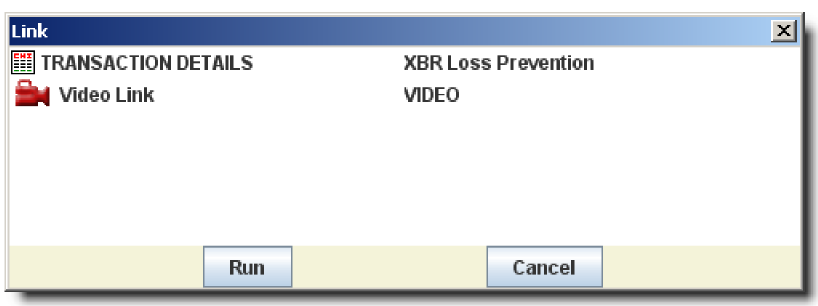
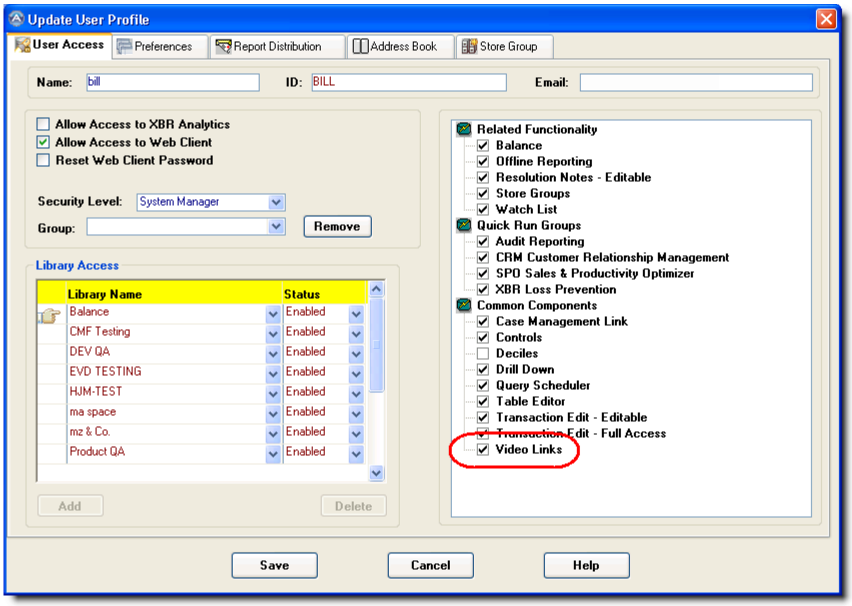


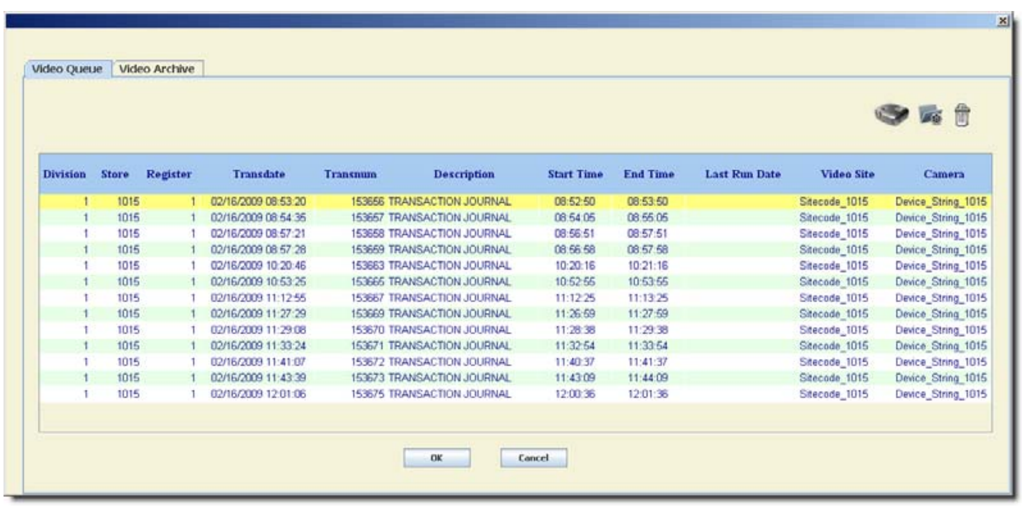
Figure 3-13: Figure 3-13: Link Dialog Box

If the user does not see a video link, have System Administrator verify that the user has access to video links.



The Video Link is only available to scheduled reports sent to My Reports. The Video Link is not available to scheduled reports sent to an inbox.

3. Select Video Link and click **Run**. The Video Queue appears with the selected transaction(s). They are temporarily stored in Video Queue and need to be archived to be permanently saved.



Division	Store	Register	Transdate	Transnum	Description	Start Time	End Time	Last Run Date	Video Site	Camera
1	1015	1	02/16/2009 08:53:20	153656	TRANSACTION JOURNAL	08:52:50	08:53:50		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 08:54:35	153657	TRANSACTION JOURNAL	08:54:05	08:55:05		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 08:57:21	153658	TRANSACTION JOURNAL	08:56:51	08:57:51		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 08:57:28	153659	TRANSACTION JOURNAL	08:56:58	08:57:58		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 10:20:46	153663	TRANSACTION JOURNAL	10:20:16	10:21:16		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 10:53:25	153665	TRANSACTION JOURNAL	10:52:55	10:53:55		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 11:12:55	153667	TRANSACTION JOURNAL	11:12:25	11:13:25		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 11:27:29	153669	TRANSACTION JOURNAL	11:26:59	11:27:59		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 11:29:08	153670	TRANSACTION JOURNAL	11:28:38	11:29:38		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 11:33:24	153671	TRANSACTION JOURNAL	11:32:54	11:33:54		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 11:41:07	153672	TRANSACTION JOURNAL	11:40:37	11:41:37		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 11:43:39	153673	TRANSACTION JOURNAL	11:43:09	11:44:09		Sitecode_1015	Device_String_1015
1	1015	1	02/16/2009 12:01:06	153675	TRANSACTION JOURNAL	12:00:36	12:01:36		Sitecode_1015	Device_String_1015

Figure 3-14: Video Queue

> *If a Video Link does not appear in the Link dialog box, it must be created and configured in the XBR Desktop application by the System Administrator or the owner of the query.*

4. Select a transaction to view.
5. If desired, edit the start time, end time, and/or camera before retrieving the video:
   - **a.** Double click on the desired field.
   - **b.** Make the desired changes.
   - **c.** Press **[Enter]** to save the changes.

> ***[Enter] must** be pressed after making a change in the Video Queue. Otherwise, the change will not be recognized or saved.*

6. Click the Projector  icon to complete the Video Link. The 3rd party video viewer or URL associated with this store/register combination will be called to retrieve the video clip.

> *If the 3rd party video viewer is not installed locally on your system or cannot be found using the installed path, contact your System Administrator.*

Archive a Video Shortcut

To save video links permanently as shortcuts, the selected transaction(s) needs to be archived. The shortcuts to the video are retained in the video archive indefinitely and can be accessed from the Query List.

The **Archive** feature retains shortcuts indefinitely.

Use the following steps to archive a video shortcut:

1. In the Query List, select and run a query.
2. From a header or detail query window, select and double-click a single row;

   or

select multiple rows and click the **Link**  icon. The Link dialog box appears.

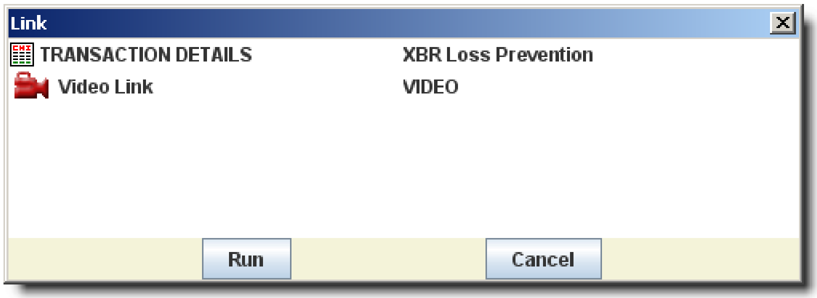


Figure 3-15: Link Dialog Box

3. Select Video Link and press **Run**. The Video Queue appears.

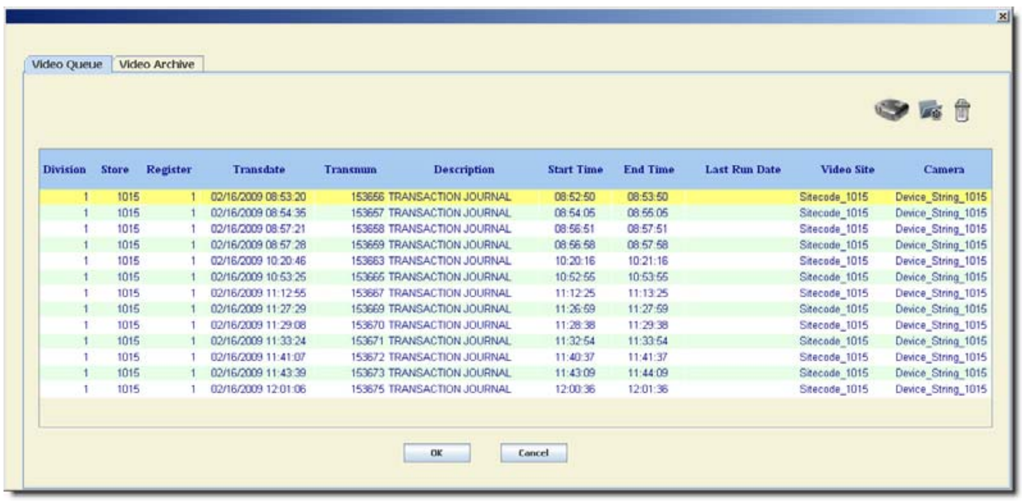


Figure 3-16: Video Queue

> **!** *If a Video Link does not appear in the Link dialog box, it must be created and configured in the XBR Desktop application by the System Administrator or the owner of the query.*

4. Select a transaction to archive.

5. Click the **Archive** icon. The Comments dialog box is displayed.

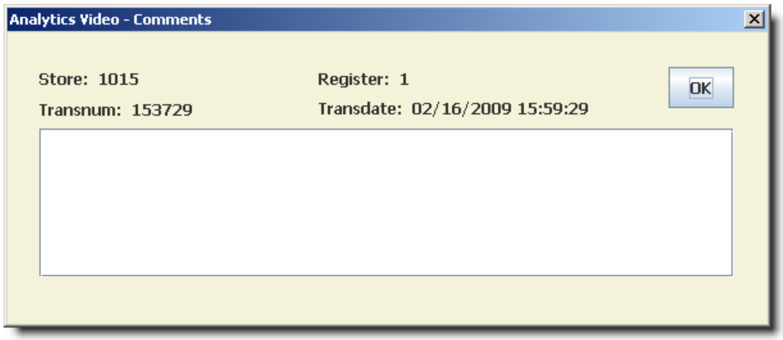


Figure 3-17: Comments Window

6. Enter a description to identify the archived shortcut at a later time and click OK. The Comments window will close and the comments entered will be displayed in the Comments block of the Video Archive window.

Execute a Video Link from Video Archive

> **!** *Depending on the age of the transaction, the video you select may no longer be available.*

1. Click the Video  icon either on the Query List page or the My Reports page. The Video Archive screen appears.
2. Select a transaction to view.
3. If desired, edit the start time, end time, and/or camera before retrieving the video:
   a. Double click on the desired field.
   b. Make the desired changes.
   c. Press **[Enter]** to save the changes.

> **!** ***[Enter] must** be pressed after making a change in the Video Archive. Otherwise, the change will not be recognized or saved.*

4. Click the **Projector**  icon to complete the Video Link. The 3rd party video viewer or URL associated with this store/register combination will be called to retrieve the video clip.

Delete an Archived Video Shortcut

Use the following steps to delete an archive video shortcut:

1. In the Video Archive window, select the video shortcut to be deleted.

2. Click the **Delete**  icon.

   The shortcut will not be immediately deleted, the shortcut will be deleted in the next processing run.

WATCH STATUS

The Watch Status feature is a visual flag that appears in selected query results. It can be added to any query by the System Administrator of your organization. Users can assign selected stores and/or associates a watch status in order to monitor questionable activity. There are various categories of watch status that can be assigned. For example, a status of warning, watch or high risk can be selected. Once stores or associates have been assigned a watch status, they can be reviewed easily by running a watch list Adhoc - Watch List - Associates or Watch List - Stores. These queries are organized in the Store & Associate Research classification.

> The classification may vary depending on deployment.

The Watch Status feature displays a permanent record of all watch status information that is entered about an employee. The entered information will be displayed in reverse chronological order, displaying the most recent note first. Any reports that include a Watch Status column, will distinguish stores or associates that have been assigned a status.

Users will see the following information for each entry added to a watch status:

- The date that the information was entered
- The watch status level that was entered (watch, warning, high risk, etc)
- The user ID of the person that entered the watch status
- The note that was entered for that cashier/store by the user

How to Assign a Watch Status to a Store or Associate

1. Select a row when viewing query results, click the **Store Watch List**  or **Employee Watch List**  button. A **Watch Status** dialog box displays.
2. Click the **Watch Status** drop down and select appropriate status.
3. Enter any descriptive information in the **Notes** section.
4. Click the **Update** button to save status update.

> Each time **Update** is clicked, the most recent note will appear first.

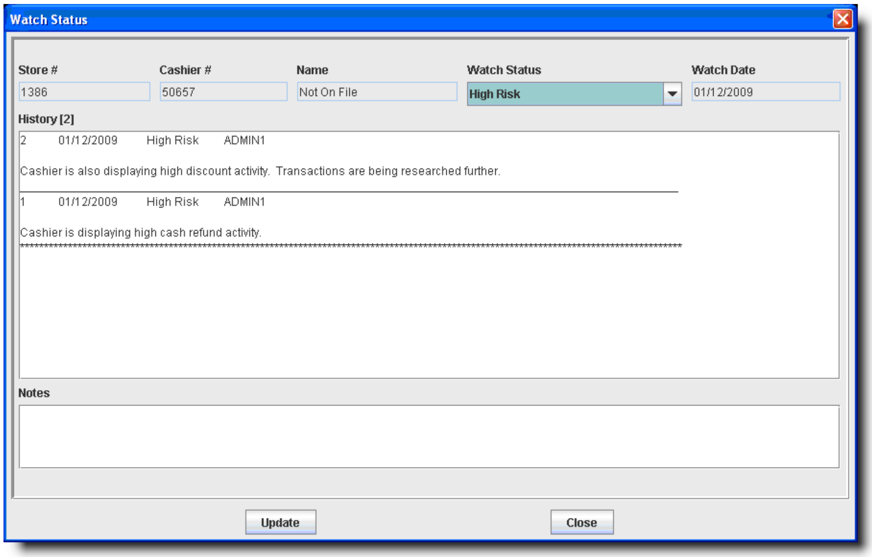
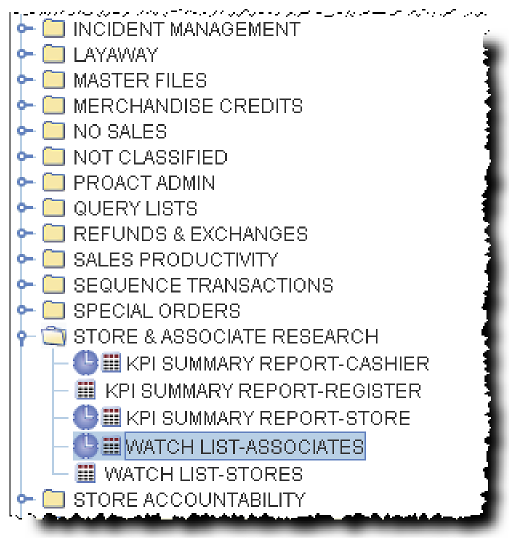


Figure 3-18: Watch Status Dialog Box

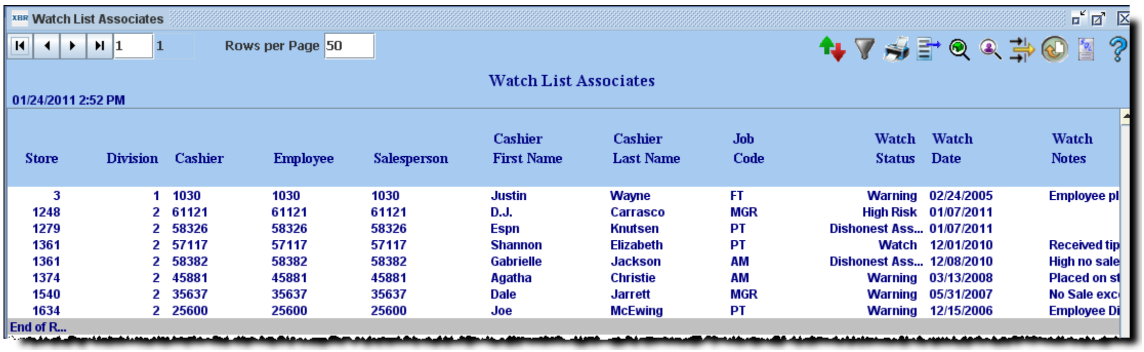
Running Watch List Adhocs

The Watch List - Associates and Watch List - Stores Adhoc queries are located in the Store & Associate Research classification (may vary). These queries will return a list of stores or associates that have been placed on watch along with the watch status, watch notes and date placed on watch.



How to Run a Watch List Query

1. Locate the *Store & Associate Research* classification (may vary) in the Query List.
2. Click either the *Watch List - Associates* or *Watch List - Stores* query.
3. Click the **Run**  button. Note the Date Range is set to None to bring back all records with a watch status therefore a specific date range isn't necessary.



Store	Division	Cashier	Employee	Salesperson	Cashier First Name	Cashier Last Name	Job Code	Watch Status	Watch Date	Watch Notes
3	1	1030	1030	1030	Justin	Wayne	FT	Warning	02/24/2005	Employee pl
1248	2	61121	61121	61121	D.J.	Carrasco	MGR	High Risk	01/07/2011	
1279	2	58326	58326	58326	Espn	Knutsen	PT	Dishonest Ass...	01/07/2011	
1361	2	57117	57117	57117	Shannon	Elizabeth	PT	Watch	12/01/2010	Received tip
1361	2	58382	58382	58382	Gabrielle	Jackson	AM	Dishonest Ass...	12/08/2010	High no sale
1374	2	45881	45881	45881	Agatha	Christie	AM	Warning	03/13/2008	Placed on st
1540	2	35637	35637	35637	Dale	Jarrett	MGR	Warning	05/31/2007	No Sale exc
1634	2	25600	25600	25600	Joe	McEwing	PT	Warning	12/15/2006	Employee Di

End of R...

Figure 3-19: Watch List - Stores

QUERY FILTER DISPLAY

Click the Query Filter Display  icon to display the filters that are currently applicable to displayed data results. This criteria can be set in the Query run window or by clicking the Filter icon within the report results. The Query Filter Display icon is a nice feature to recall the user's filter selections..

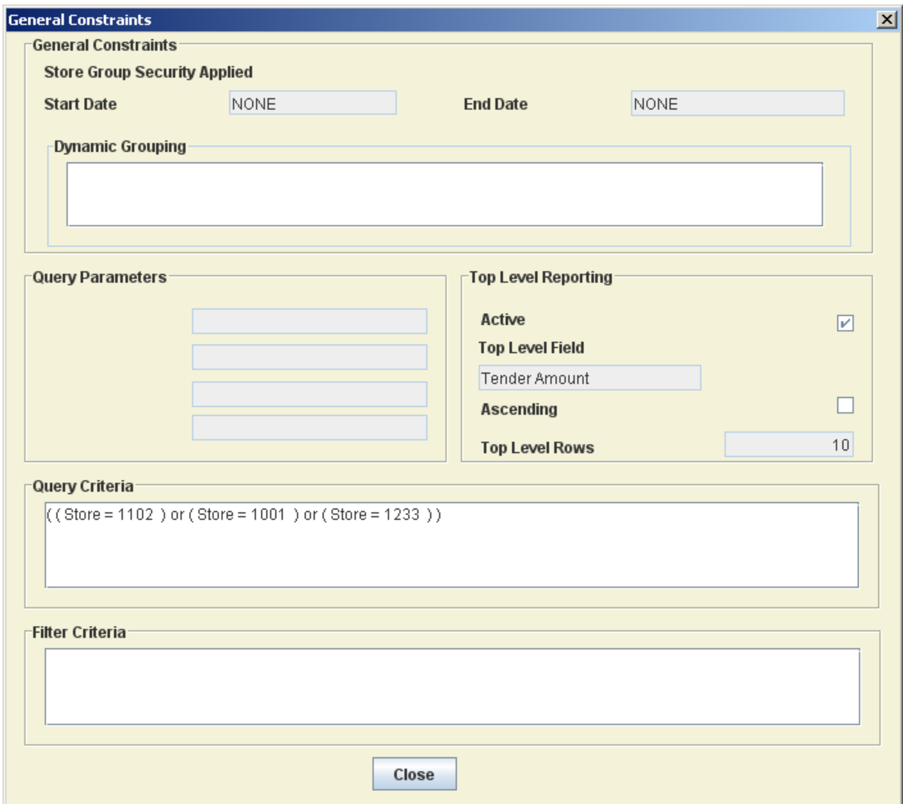


Figure 3-20: Query Filter Display Screen

XBR

CHAPTER 4

Exporting and Printing

OVERVIEW

Adhoc query results are displayed temporarily. Once the results window is closed, the query needs to be run again by re-running the query from the Query List in order to retrieve the same results. The export and print functions allow users to retain a permanent record of query results without having to rerun a query again.

Once the query results are exported, users can then email the file by attaching it to an email message or by using the email option provided in the exported file formats.

LEARNING OBJECTIVES

Upon completion of this section, you should be able to:

- Export query results
- Email query results
- Print query results

EXPORTING

Exporting allows users to save query results permanently until the file is manually deleted. This feature is a resourceful tool because it allows users to retain Adhoc results without having to re-run a query.

The Export button allows you to export your query results to various file formats. Users can then open and view the report without having to log in to Analytics. There are three formats available:

- Adobe Acrobat (PDF)
- Comma Separated Values (CSV)
- Microsoft Excel (XLS)

Helpful Hints:

- Information that is exported is saved independently of Analytics.
- The ability to link to other queries or to drill downs is not available for exported queries.
- Exporting is a time saver - especially for users connecting remotely. Users can send other users an export of the query results rather than re-running the query.
- It is recommended that users make a note to help remember the drive and folder the exported query was saved to.

How to Export a Query

1. When viewing query results, click the **Export**  icon.

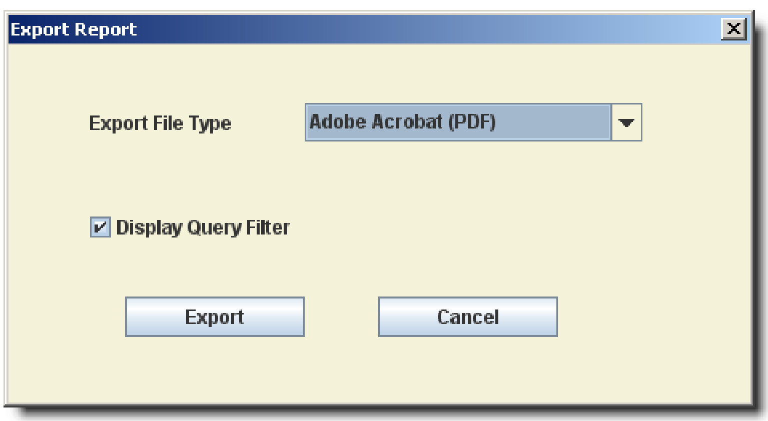


Figure 4-1: Export Report Dialog Box

2. Select a desired File Type from the drop down list:
   - Adobe Acrobat (PDF)
   - Excel (XLS)
   - Comma Separated Values (CSV)

> Query results exported as a PDF file will be 'fit to page'.

3. Select **Display Query Filter** if you want any filters and criteria set to display in the file.
4. Click the **Export** button.

   The Save dialog box will display.

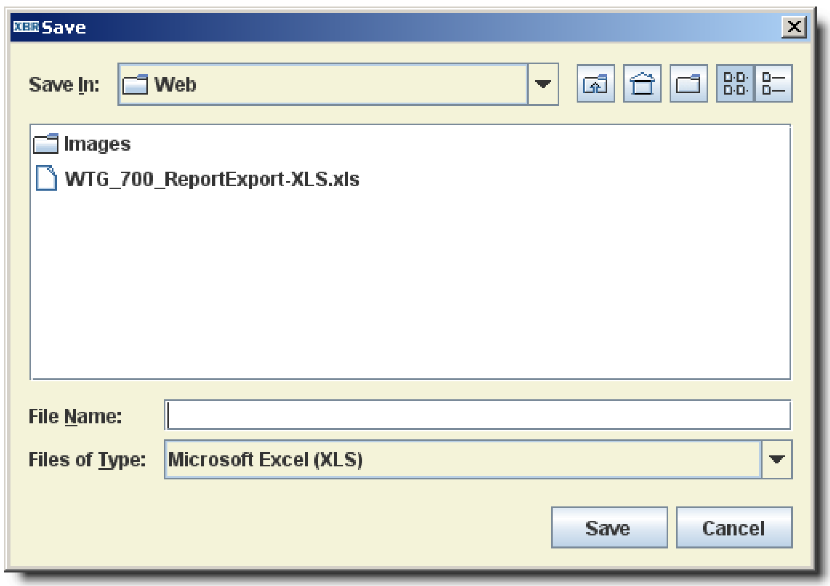
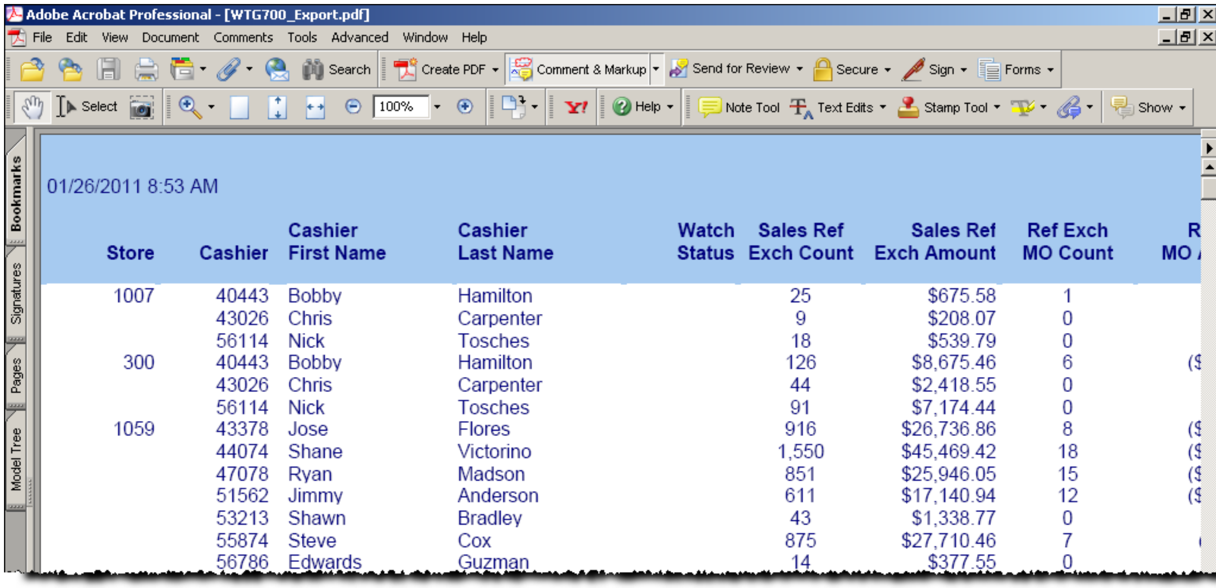


Figure 4-2: File Download

5. Navigate to the folder where the export file will be saved.
6. Enter a File Name for the export file.
7. Click the **Save** button.

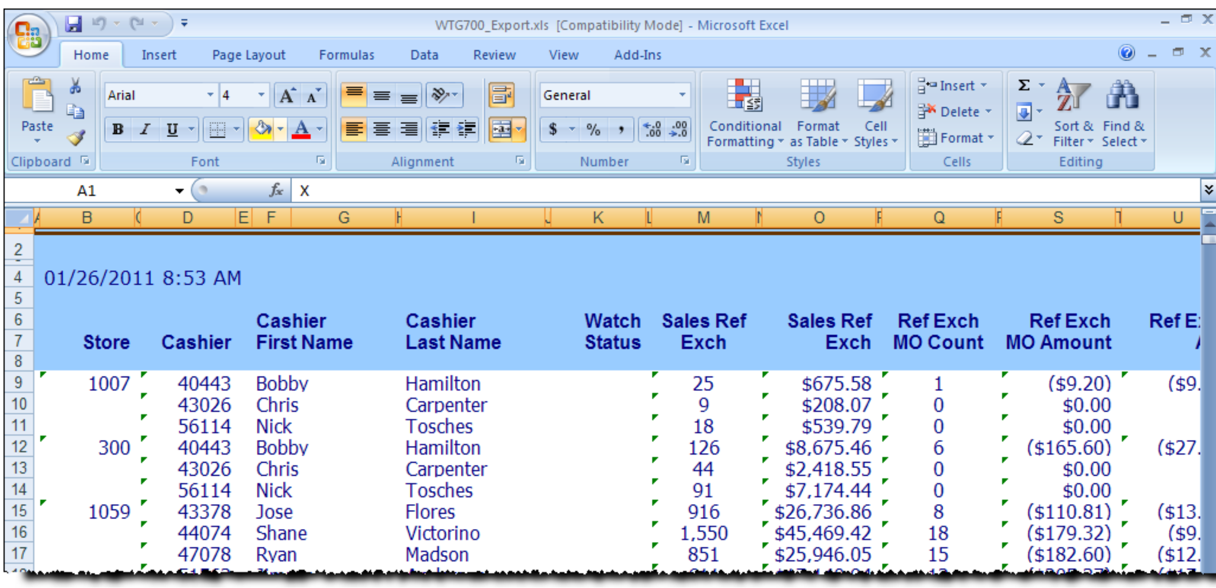
Sample PDF export



Store	Cashier	Cashier First Name	Cashier Last Name	Watch Status	Sales Ref Exch Count	Sales Ref Exch Amount	Ref Exch MO Count	R MO
1007	40443	Bobby	Hamilton		25	$675.58	1	
	43026	Chris	Carpenter		9	$208.07	0	
	56114	Nick	Tosches		18	$539.79	0	
300	40443	Bobby	Hamilton		126	$8,675.46	6	($
	43026	Chris	Carpenter		44	$2,418.55	0	
	56114	Nick	Tosches		91	$7,174.44	0	
1059	43378	Jose	Flores		916	$26,736.86	8	($
	44074	Shane	Victorino		1,550	$45,469.42	18	($
	47078	Ryan	Madson		851	$25,946.05	15	($
	51562	Jimmy	Anderson		611	$17,140.94	12	($
	53213	Shawn	Bradley		43	$1,338.77	0	
	55874	Steve	Cox		875	$27,710.46	7	(
	56786	Edwards	Guzman		14	$377.55	0	

Figure 4-3: PDF Export File

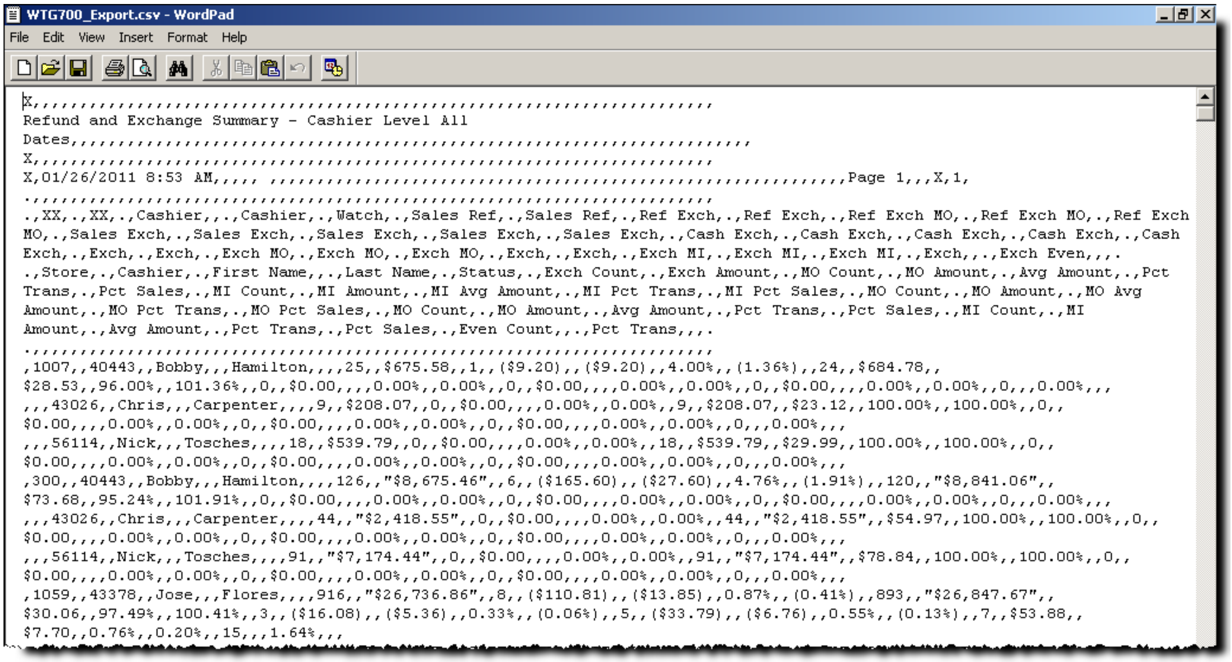
Sample Excel export



Row	Store	Cashier	Cashier First Name	Cashier Last Name	Watch Status	Sales Ref Exch	Sales Ref Exch	Ref Exch MO Count	Ref Exch MO Amount	Ref E…
9	1007	40443	Bobby	Hamilton		25	$675.58	1	($9.20)	($9.
10		43026	Chris	Carpenter		9	$208.07	0	$0.00	
11		56114	Nick	Tosches		18	$539.79	0	$0.00	
12	300	40443	Bobby	Hamilton		126	$8,675.46	6	($165.60)	($27.
13		43026	Chris	Carpenter		44	$2,418.55	0	$0.00	
14		56114	Nick	Tosches		91	$7,174.44	0	$0.00	
15	1059	43378	Jose	Flores		916	$26,736.86	8	($110.81)	($13.
16		44074	Shane	Victorino		1,550	$45,469.42	18	($179.32)	($9.
17		47078	Ryan	Madson		851	$25,946.05	15	($182.60)	($12.

Figure 4-4: Excel Export File

Sample CSV export

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Refund and Exchange Summary - Cashier Level All
Dates,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
X,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
X,01/26/2011 8:53 AM,,,,, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,Page 1,,,X,1,
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.,XX,.,XX,.,Cashier,,.,Cashier,.,Watch,.,Sales Ref,.,Sales Ref,.,Ref Exch,.,Ref Exch,.,Ref Exch MO,.,Ref Exch MO,.,Ref Exch
MO,.,Sales Exch,.,Sales Exch,.,Sales Exch,.,Sales Exch,.,Sales Exch,.,Cash Exch,.,Cash Exch,.,Cash Exch,.,Cash Exch,.,Cash
Exch,.,Exch,.,Exch,.,Exch MO,.,Exch MO,.,Exch MO,.,Exch,.,Exch,.,Exch MI,.,Exch MI,.,Exch MI,.,Exch,,.,Exch Even,,,.
.,Store,.,Cashier,.,First Name,,.,Last Name,.,Status,.,Exch Count,.,Exch Amount,.,MO Count,.,MO Amount,.,Avg Amount,.,Pct
Trans,.,Pct Sales,.,MI Count,.,MI Amount,.,MI Avg Amount,.,MI Pct Trans,.,MI Pct Sales,.,MO Count,.,MO Amount,.,MO Avg
Amount,.,MO Pct Trans,.,MO Pct Sales,.,MO Count,.,MO Amount,.,Avg Amount,.,Pct Trans,.,Pct Sales,.,MI Count,.,MI
Amount,.,Avg Amount,.,Pct Trans,.,Pct Sales,.,Even Count,,.,Pct Trans,,,.
.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
,1007,,40443,,Bobby,,,Hamilton,,,,25,,$675.58,,1,,($9.20),,($9.20),,4.00%,,(1.36%),,24,,$684.78,,
$28.53,,96.00%,,101.36%,,0,,$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,,0.00%,,,
,,,43026,,Chris,,,Carpenter,,,,9,,$208.07,,0,,$0.00,,,,0.00%,,0.00%,,9,,$208.07,,$23.12,,100.00%,,100.00%,,0,,
$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,,0.00%,,,
,,,56114,,Nick,,,Tosches,,,,18,,$539.79,,0,,$0.00,,,,0.00%,,0.00%,,18,,$539.79,,$29.99,,100.00%,,100.00%,,0,,
$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,,0.00%,,,
,300,,40443,,Bobby,,,Hamilton,,,,126,,"$8,675.46",,6,,($165.60),,($27.60),,4.76%,,(1.91%),,120,,"$8,841.06",,
$73.68,,95.24%,,101.91%,,0,,$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,,0.00%,,,
,,,43026,,Chris,,,Carpenter,,,,44,,"$2,418.55",,0,,$0.00,,,,0.00%,,0.00%,,44,,"$2,418.55",,$54.97,,100.00%,,100.00%,,0,,
$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,,0.00%,,,
,,,56114,,Nick,,,Tosches,,,,91,,"$7,174.44",,0,,$0.00,,,,0.00%,,0.00%,,91,,"$7,174.44",,$78.84,,100.00%,,100.00%,,0,,
$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,$0.00,,,,0.00%,,0.00%,,0,,,0.00%,,,
,1059,,43378,,Jose,,,Flores,,,,916,,"$26,736.86",,8,,($110.81),,($13.85),,0.87%,,(0.41%),,893,,"$26,847.67",,
$30.06,,97.49%,,100.41%,,3,,($16.08),,($5.36),,0.33%,,(0.06%),,5,,($33.79),,($6.76),,0.55%,,(0.13%),,7,,$53.88,,
$7.70,,0.76%,,0.20%,,15,,,1.64%,,,
```

Figure 4-5: CSV Export File

EMAILING QUERY RESULTS

An exported file can be emailed by opening your email system and attaching the exported file to the message. Alternatively, once the query results have been exported into a specific file format, they can then be emailed using the file format's email option.

Emailing an Exported File

How to Email an Exported File

1. Open your email system on your PC and create a new mail message.
2. Depending on your email system, use the **Insert** or **Attach File** option to locate and attach your exported file.
3. When finished, click **Send**.

Emailing a PDF file from Adobe Acrobat Reader

How to Email a PDF File

> Adobe Acrobat Reader is necessary for these steps.

4. After exporting the query results as a PDF file, locate the exported PDF file on your PC.
5. Open the PDF file - it will open using the Adobe Acrobat Reader.
6. Click the File menu option and select **Send Mail**.

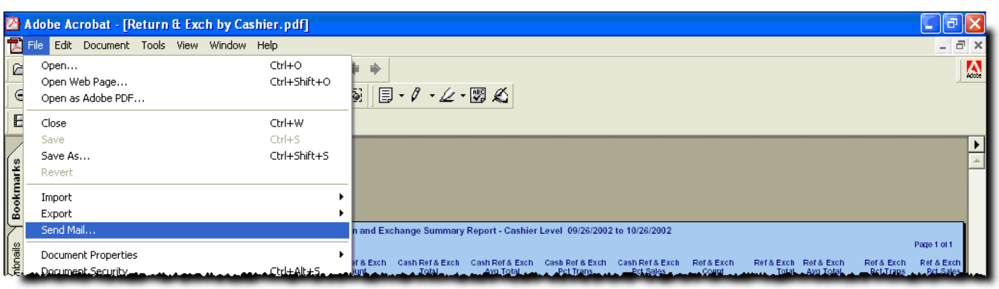
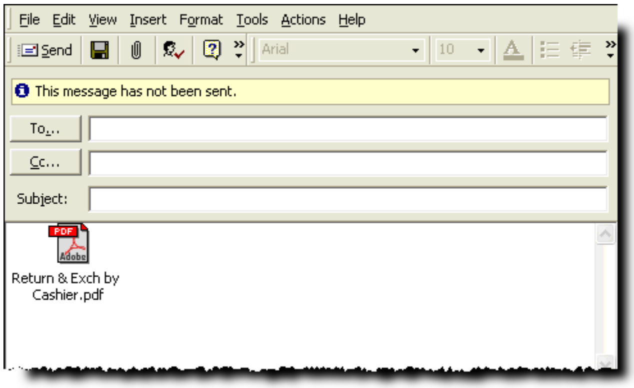


Figure 4-6: Email PDF File

7. Based on the email system you are using, a **Send** window will appear. Complete the To: and Subject: fields. Enter any descriptive body text in the email message and click the Send button.



Emailing an Excel file from Excel

How to Email an Excel File

The Excel version may differ from the example displayed.

1. After exporting the query results as an Excel file, locate the exported Excel file on your PC.
2. Open the Excel file.
3. Click the **File** menu option and select **Send To**.

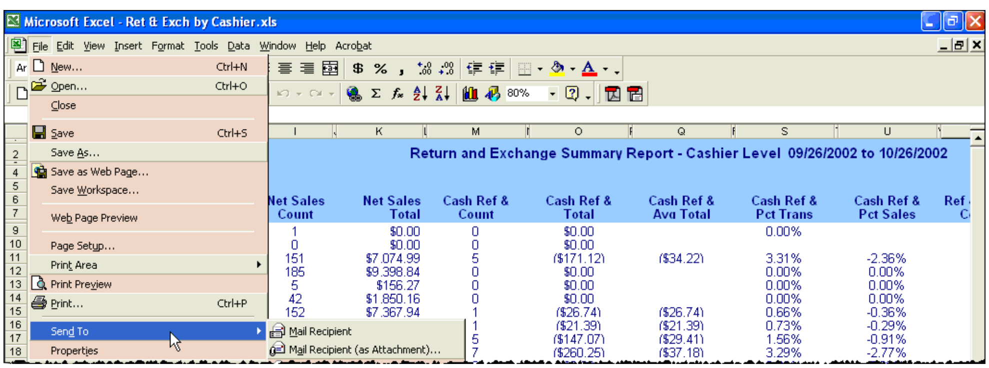
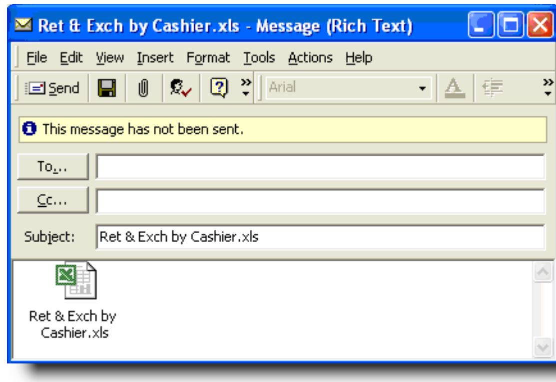


Figure 4-7: Email Excel File

4. Select Mail Recipient (as Attachment).

5. Based on the email system you are using, a Send window will appear. Complete the To: and Subject: fields. Enter any descriptive body text in the email message and click the Send button.



PRINTING

Query results can be printed from within the Web Application by using the "print" icon. The print feature will automatically print the query results in a PDF format. Users can also print query results directly from exported PDF, Excel or CSV file formats.

Printing Query Results

How to Print Query Results

1. Click the **Print**  icon from the toolbar.

2. The print function will automatically print the query results in a PDF format. Select the **Print**, **Print Direct**, or **Print Preview** buttons.

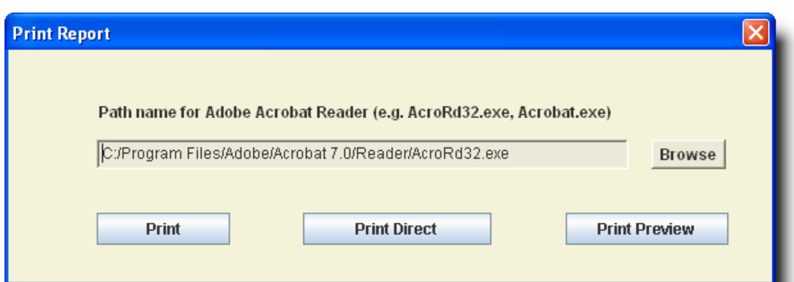


Figure 4-8: Print Results

a. If **Print** is selected, then a standard print window will appear where users can make additional print options like the number of copies to print, the specific pages to print or which printer the query results should be sent to.

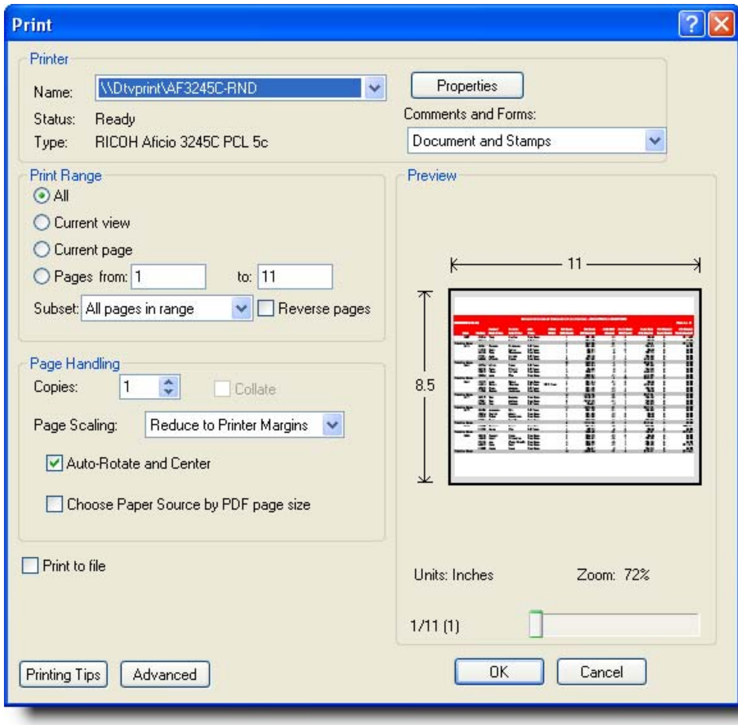


Figure 4-9: Printer Options

b. If **Print Direct** is selected, then the query results will automatically be sent to the user's default printer. Users will not see a print window nor the results in PDF format prior to the report printout.

c. If **Print Preview** is selected, then the query results will open into a print preview window. Users will see how the data is formatted on a selected page size in PDF format prior to sending the report results to a printer.

Printing a Saved PDF file from Adobe Acrobat Reader

How to Print a PDF File

Adobe Acrobat Reader is necessary for these steps.

1. After exporting the query results as a PDF file, locate the exported PDF file on your PC.
2. Open the PDF file - it will open using the Adobe Acrobat Reader.

3. Click the **File** menu option and select **Print**.

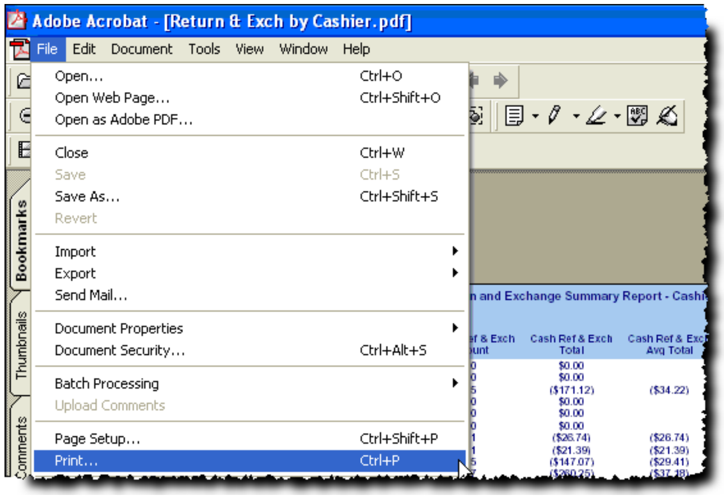


Figure 4-10: Print from PDF

4. The Print dialog box will appear. Select desired print options and click **OK** to print.

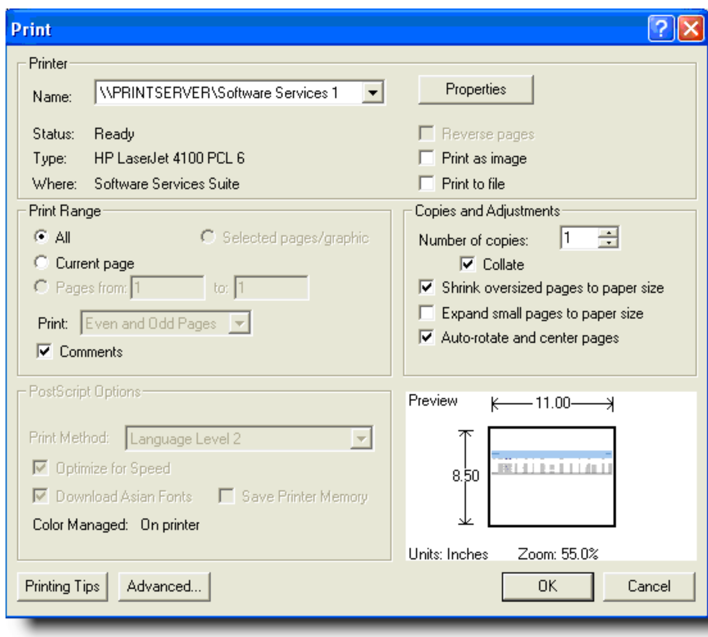


Figure 4-11: Print Dialog Box

Printing an Excel file from Excel

How to Print an Excel File

1. After exporting the query results as an Excel file, locate the exported Excel file on your PC.
2. Open the Excel file.
3. Click the **File** menu option and select **Print**. The Print dialog box will appear.

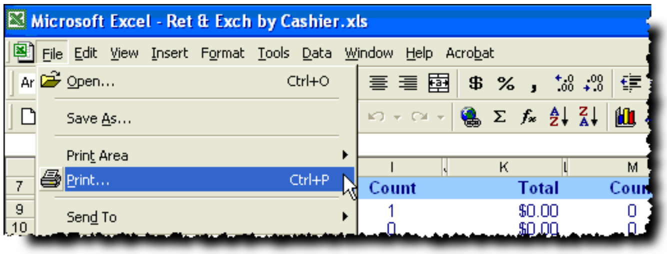


Figure 4-12: Print Excel File

4. Select desired print options and click **OK** to print.

Click the **Preview** button to view how the report will appear when printed.

CHAPTER 5

Scheduling Adhocs, Alerts, and EVD Reports

OVERVIEW

Queries can be scheduled to run automatically on a regular basis. By automating Adhocs, the query results can be waiting in My Reports.

In addition to scheduling queries, users can set specific criteria that will create an alert and/ or Employee Violation Dashboard (EVD) report. Alerts are generated by specific criteria that is set up by the user that typically focuses on more specific activity occurring from a selected report. Alerts can be reviewed upon logging into Analytics, via e mail, as an attachment to a mobile device. You will most likely want reports to run overnight but probably do not want to page anyone with an alert until the morning. Therefore alerts can be distributed in the morning after queries are run.

Employee Violations Dashboard (EVD) reports can be generated and distributed. EVD reports are generated for each employee/cashier that exceeds one or more alert filters. EVD reports are distributed as PDF attachments via email to users assigned to the run.

Scheduled queries are identified on the query list with a small clock icon next to the query name, indicating that there is at least one scheduled run for that query. A query could potentially have more than one scheduled run assigned to it. For example, some users might prefer a weekly generated report and other users may prefer monthly generated report of the same Adhoc.

LEARNING OBJECTIVES

Upon completion of this section, You should be able to:

- Schedule Adhoc queries
- Modify a scheduled query
- Delete a scheduled query
- Set Alerts for Adhocs
- Generating EVD Reports

PROCEDURES

SCHEDULING ADHOCS

Adhocs can be scheduled to run automatically on a regular basis such as weekly, monthly or for a specified time period. Users can be alerted if specific criteria are exceeded in the Adhoc results when the query is run.

How to Schedule Adhocs

1. Select an Adhoc from the Query List

2. Click the **Schedule**  button. The **Schedule** dialog box is displayed.

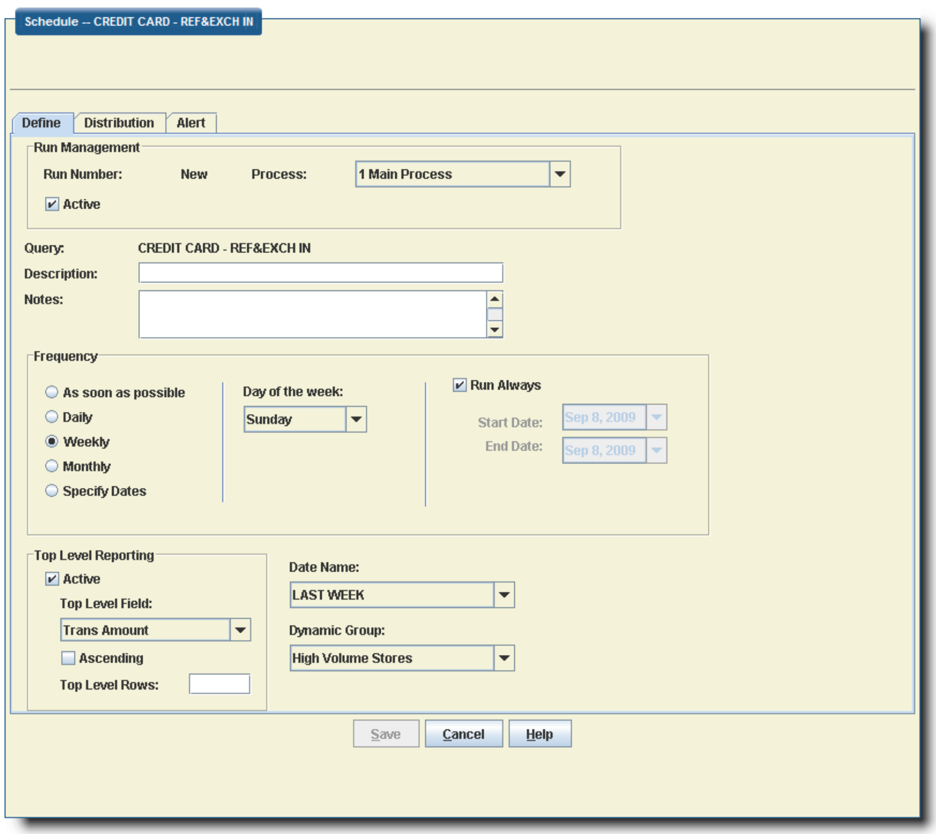


Figure 5-1: Schedule Window - Define Tab

3. On the Define tab, select a **Process** number, which defines the time of day this query will run. The scheduled times for each process are configured in the scheduling software that runs on the server.

4. The Active check box will be selected by default. It can be unchecked to temporarily deactivate and then re-activated a later date.

5. **[OPTIONAL]** Type more detailed notes in the **Notes** text box. For example, explain the purpose of scheduling the query as well as the data it will generate.
6. **[REQUIRED]** Type a short description in the **Description** field.
7. Select the **Frequency** of how often the query should run. When you select **Weekly** or **Monthly**, you are prompted to select the day of the week or month the query should run.

   Run Always will be selected by default, which will run the query indefinitely for the **Frequency** you selected.

   To run the query automatically for a specific period of time, de-select **Run Always** and choose specific Start and End dates.
8. Select the **Date Name** for the time period to return query results. For example, if a query is scheduled to run weekly, a **Date Name** of **Last Week** would be appropriate.
9. **[OPTIONAL]** If you want to receive only X number of rows, activate **Top Level Reporting**. Choose a field from the Top Level Field list box to filter on. This will filter the query and only return the top number of rows (the number indicated in the Top Level Rows box) based on the field chosen. Indicate the number of rows you want returned in the Top Level Rows box.
10. **[OPTIONAL]** Select a **Dynamic Group** from the drop down list, (which was set up by a System Admin. in the Analytics Desktop application) from the list. The results will only include data from the group you selected.
11. Select the **Distribution** tab.

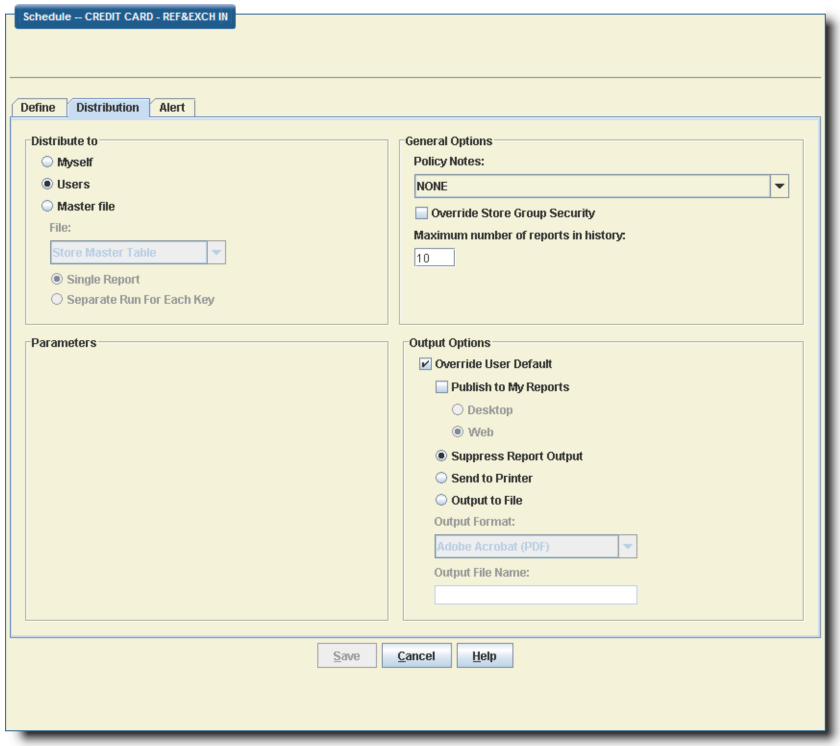


Figure 5-2: Schedule Window - Distribution Tab

12. Select who to **Distribute** the results to:

User - Distribute the results to individual users that you assign.

Myself - Only you will receive the report.

Master File - Distribute results based on a Master file, (i.e. Store, Region). Store Group Security is not applied when using Master File Distribution.

File - Used with the Master File option to select which Master File will be used to distribute the query results

Single Report - Used with the Master File option. One report will be generated and distributed to the designated people based on the Master File.

Separate Run for Each Key - Used with the Master File option. The query results will be separated by a key field (i.e. store number, region, district) and distributed to the assigned person for the key field, so the regional manager for region one will only receive query results for region one and not the entire query results.

13. If you are scheduling a query that has a parameter such as a “multi-use” report or a “> X” query, enter the value in the **Parameters** area.

14. Select a **Policy Note** that will be attached to the query results.

15. **Override Store Group Security** - Check this box if you do not want to use Store Group Security when distributing the results. This option is not available when the Master File option is selected.
16. Enter the number of this specific report you would like to keep in history (**Maximum number of reports in history**). Once the number is reached the oldest of this run report will be deleted.
17. If you want the users to receive the results a specific way, select **Override User Default**. You can choose to have users receive the query results one of the following ways:

    Publish to My Reports - The query results will be sent to the assigned recipients My Reports Window.

        Desktop - Select Desktop to have the results place on the Analytics Desktop My Reports window.

        Web - Select Web to have the results place on the Analytics Web application My Reports window.

18. Select **Suppress Report Output** to not generate results. Use this if you are running queries to check for alert conditions only and you are not planning to send the results to other users.
19. Select **Send To Printer** to send the results directly to a printer. The printer used will be the default printer for the server that the Query Launcher runs on.
20. The **Output to File** option writes the results out as a file, which can be emailed to users or copied to a directory on a network. The file can be output in any file format available from the Output format list. Specify an Output File Name and the Output Format if you choose this option.
21. Click the Alert tab. An alert does not need to be set on every query that you schedule. Setting an alert allows a user to be notified if the query returns data that met the criteria of the alert.

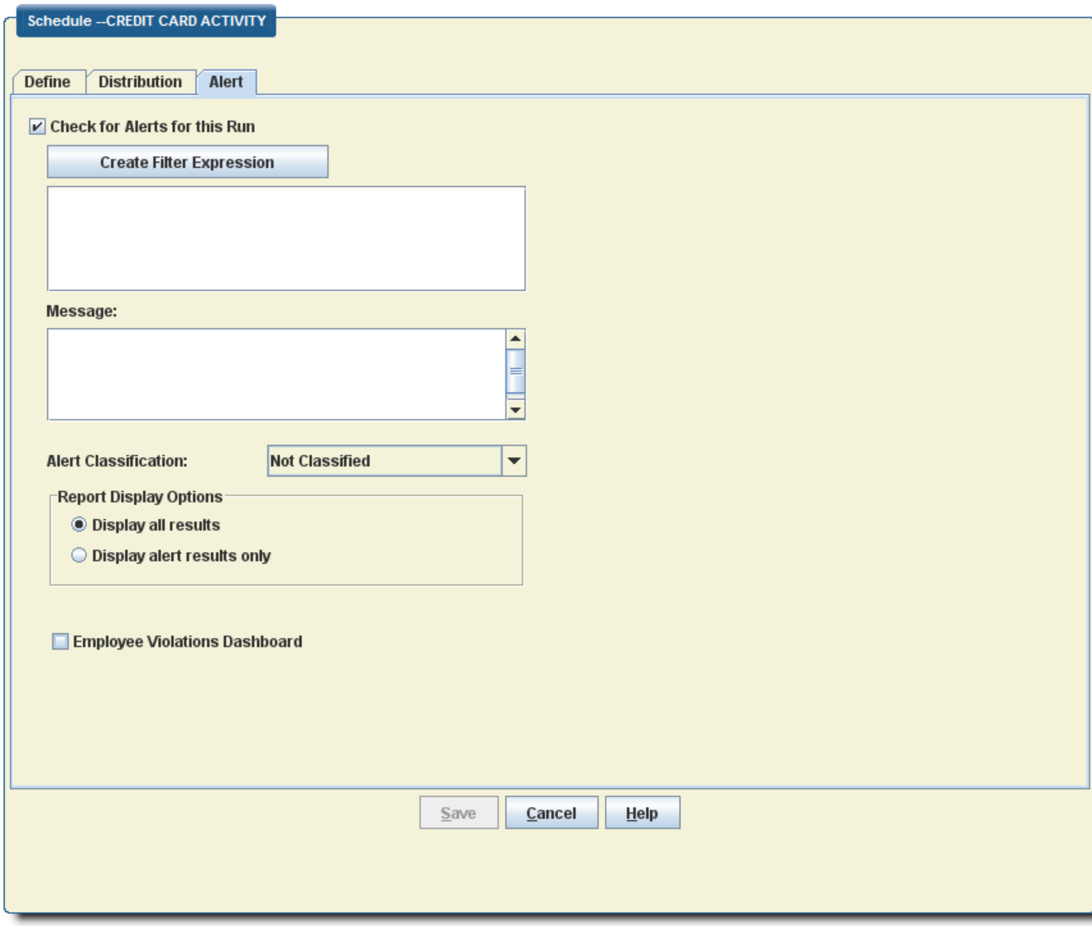


Figure 5-3: Schedule Window - Alert Tab

22. Select **Check for Alerts for this Run**.

23. Click the **Create Filter Expression** button to create criteria for the alert. The **Filter** dialog box will display.

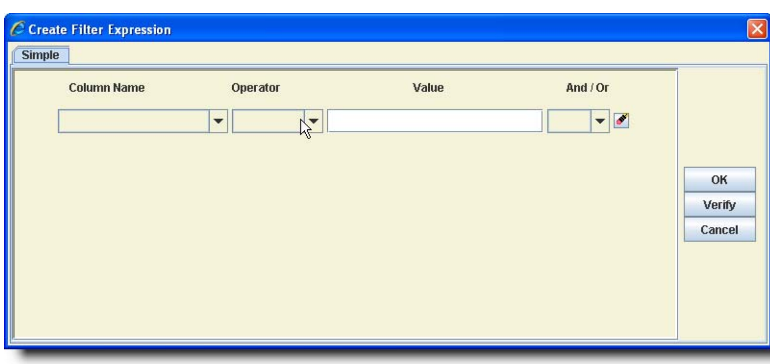


Figure 5-4: Create Filter Expression Dialog Box

  a. Build an expression to check for a specific condition or value that needs to be met or exceeded in order to generate an alert notification when the report runs. If a specific filter is not created, the user will receive an alert whenever the Adhoc report is generated.

  b. Use the **Verify** button to validate the format of your filter.

  c. Click the **OK** button.

24. Type a message in the **Message** (Figure 5-3) text box. This message will be sent to users (based on their alert options) any time an alert condition is detected. This message appears both in an email alert as the Subject and in the Alert window when logged into Analytics.

25. Select an **Alert Classification** of where you want the alert to appear on the Alert list in Analytics. This will be covered in the Reading Alert Messages in Analytics section.

26. Select one of the **Report Display Options**:

    Display All Results - the records that meet the alert criteria will be highlighted.

    Display Alert Results Only - will only return records that meet the alert criteria.

27. Check **Employee Violations Dashboard** (EVD) if PDF EVD reports are to be emailed to the recipients indicated in the Distribution tab. See "Employee Violations Dashboard Reports" on page 80 for more information on EVDs.

28. Click the **Save** button. The **Scheduling** dialog box displays (System Administrators and System Managers only).

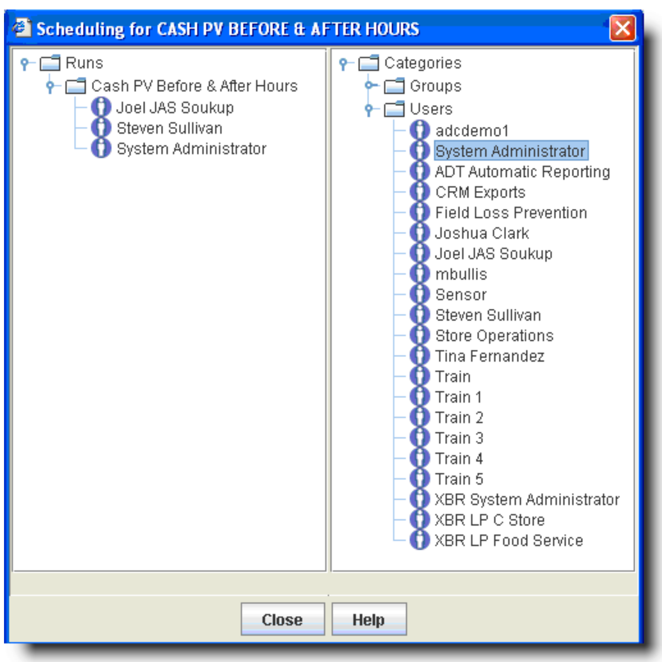


Figure 5-5: Scheduling Dialog Box

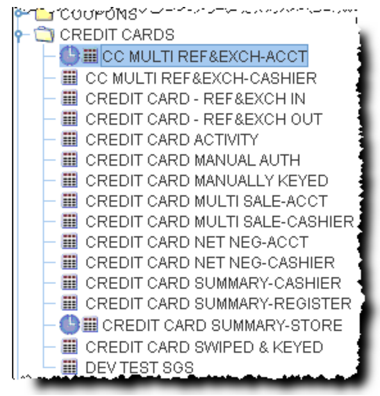
29. On the right side of the pop up window double-click on **Users** or click on the expand button adjacent to **Users**. A list of available users will display.

System Administrators and *System Managers* can assign users to the scheduled query by clicking and dragging the User ID from the right side to the left side.

Analyst users can schedule queries to themselves only. They will not have a split window with User IDs on the right side.

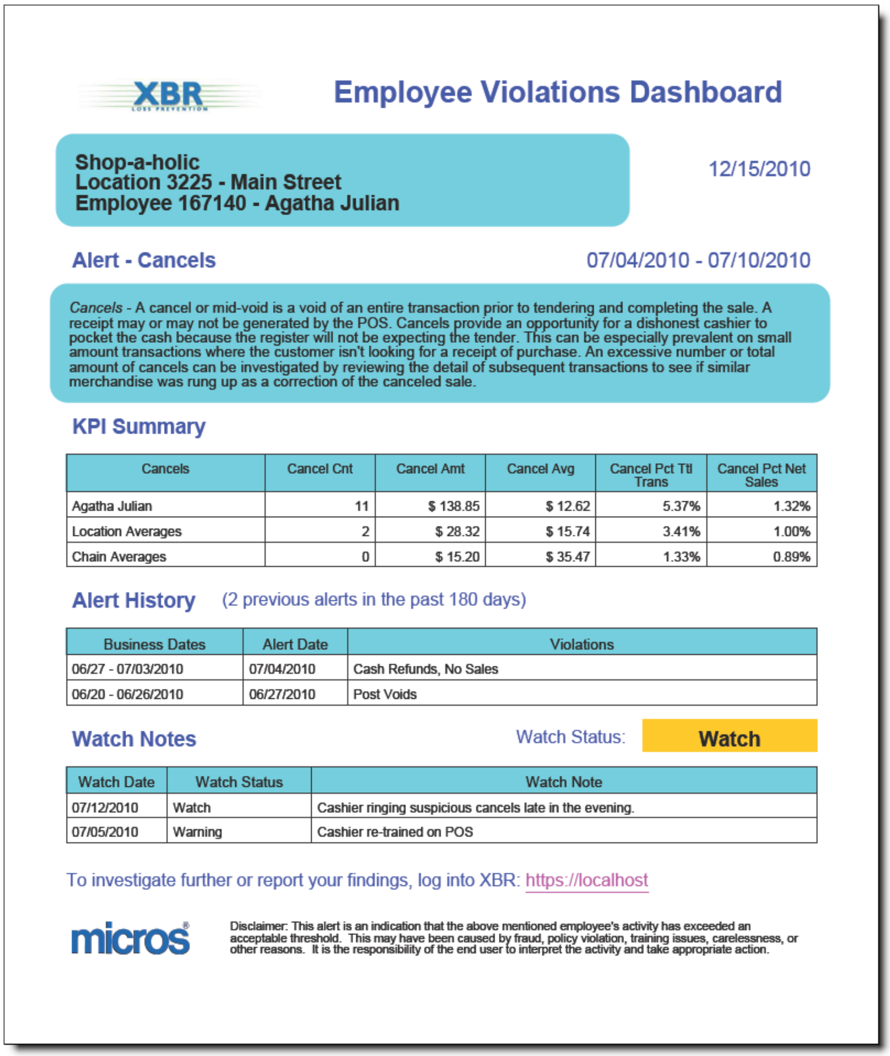
30. Click the **Close** button.

31. The scheduled query will appear on the **Adhocs** tab with a clock icon adjacent to it.



Employee Violations Dashboard Reports

The Employee Violations Dashboard (EVD) report is an employee alert report sent from XBR to end-users. These reports are automatically generated in a PDF format when employees exceed specified criteria for activity. These reports are optional for XBR end-users but are considered a beneficial tool in alerting users of any associate who frequently exceeds set thresholds which can be a threat to company profitability and morale. EVD reports can only be generated if an Alert report is enabled on a scheduled Adhoc. The EVD reports can represent one or more risk areas, depending on the build of the originating Adhoc query.



XBR

Employee Violations Dashboard

Shop-a-holic
Location 3225 - Main Street
Employee 167140 - Agatha Julian

12/15/2010

Alert - Cancels

07/04/2010 - 07/10/2010

Cancels - A cancel or mid-void is a void of an entire transaction prior to tendering and completing the sale. A receipt may or may not be generated by the POS. Cancels provide an opportunity for a dishonest cashier to pocket the cash because the register will not be expecting the tender. This can be especially prevalent on small amount transactions where the customer isn't looking for a receipt of purchase. An excessive number or total amount of cancels can be investigated by reviewing the detail of subsequent transactions to see if similar merchandise was rung up as a correction of the canceled sale.

KPI Summary

Cancels	Cancel Cnt	Cancel Amt	Cancel Avg	Cancel Pct Ttl Trans	Cancel Pct Net Sales
Agatha Julian	11	$ 138.85	$ 12.62	5.37%	1.32%
Location Averages	2	$ 28.32	$ 15.74	3.41%	1.00%
Chain Averages	0	$ 15.20	$ 35.47	1.33%	0.89%

Alert History (2 previous alerts in the past 180 days)

Business Dates	Alert Date	Violations
06/27 - 07/03/2010	07/04/2010	Cash Refunds, No Sales
06/20 - 06/26/2010	06/27/2010	Post Voids

Watch Notes

Watch Status: Watch

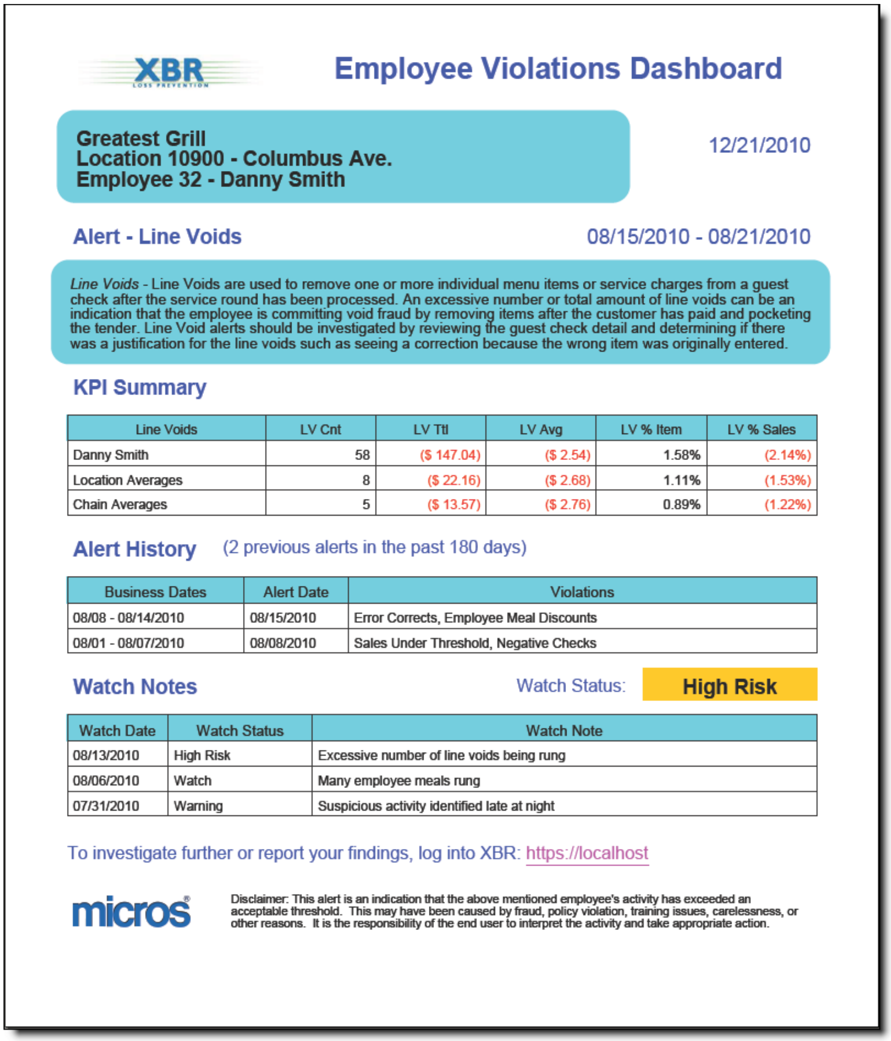
Watch Date	Watch Status	Watch Note
07/12/2010	Watch	Cashier ringing suspicious cancels late in the evening.
07/05/2010	Warning	Cashier re-trained on POS

To investigate further or report your findings, log into XBR: https://localhost

micros

Disclaimer: This alert is an indication that the above mentioned employee's activity has exceeded an acceptable threshold. This may have been caused by fraud, policy violation, training issues, carelessness, or other reasons. It is the responsibility of the end user to interpret the activity and take appropriate action.

Figure 5-6: Sample Retail/Grocery EVD Report



Employee Violations Dashboard

Greatest Grill
Location 10900 - Columbus Ave.
Employee 32 - Danny Smith

12/21/2010

Alert - Line Voids

08/15/2010 - 08/21/2010

Line Voids - Line Voids are used to remove one or more individual menu items or service charges from a guest check after the service round has been processed. An excessive number or total amount of line voids can be an indication that the employee is committing void fraud by removing items after the customer has paid and pocketing the tender. Line Void alerts should be investigated by reviewing the guest check detail and determining if there was a justification for the line voids such as seeing a correction because the wrong item was originally entered.

KPI Summary

Line Voids	LV Cnt	LV Ttl	LV Avg	LV % Item	LV % Sales
Danny Smith	58	($ 147.04)	($ 2.54)	1.58%	(2.14%)
Location Averages	8	($ 22.16)	($ 2.68)	1.11%	(1.53%)
Chain Averages	5	($ 13.57)	($ 2.76)	0.89%	(1.22%)

Alert History (2 previous alerts in the past 180 days)

Business Dates	Alert Date	Violations
08/08 - 08/14/2010	08/15/2010	Error Corrects, Employee Meal Discounts
08/01 - 08/07/2010	08/08/2010	Sales Under Threshold, Negative Checks

Watch Notes

Watch Status: High Risk

Watch Date	Watch Status	Watch Note
08/13/2010	High Risk	Excessive number of line voids being rung
08/06/2010	Watch	Many employee meals rung
07/31/2010	Warning	Suspicious activity identified late at night

To investigate further or report your findings, log into XBR: https://localhost

Disclaimer: This alert is an indication that the above mentioned employee's activity has exceeded an acceptable threshold. This may have been caused by fraud, policy violation, training issues, carelessness, or other reasons. It is the responsibility of the end user to interpret the activity and take appropriate action.

Figure 5-7: Sample Foodservice EVD Report

To generate an EVD report from an Adhoc query, the query must contain summary level data which returns rolled up statistics at the cashier/employee level. Summary level data returns one record per cashier/employee in the results of an Adhoc query. EVD reports can not be generated for specific transactions or any other data level in the database.

There are eight (8) Core EVD Key Performance Indicators (KPI) violations that can be achieved by creating an alert filter using a key metric in one of these areas. The content of the EVD will be based upon the field used in the filter.

The EVD KPIs are:

Retail/Grocery KPIs	Foodservice KPIs
Cash Refunds	Line Voids
Post Voids	Error Corrects
Cash Post Voids	Subtotal Discounts
Cancels	Employee Meal Discounts
Line Voids	Tips Over Threshold
No Sales	Sales Under Threshold
Line Discounts	Zero Amount Checks
Price Overrides	Negative Checks

The EVD report will include statistical totals and averages for the employee, location, and chain. In addition, the report will also include:

- Policy Notes for each of the risk areas listed in the letter
- EVD Alert History for the cashier/employee
- Watch Status and notes for the cashier/employee
- Hyperlink to the XBR Web Application

To generate an EVD report, the user needs to have scheduling rights. The standard scheduling setup is followed, including setting up the Alert expression.

Example 1:

If the Alert expression is set to view any cashiers that exceed ten (10) No Sale Transactions, then the EVD report will also generate, if enabled, a report for each of the cashiers that actually met this filter expression. The Alert filter expression would be:

No Sales >= 10

To view more than one risk area on a given EVD report, the Alert criteria must have multiple filter expressions. This is called a "compound filter". Compound filters require parentheses around each individual filter expression with an "OR" separating them and there must be at least one (1) space before ***and*** after the math operators. For example:

Good: No Sales Count > 10
Bad: No Sales Count> 10

.

Compound filters can only be created in XBR Desktop.

Example 2:

If the Alert expression is set to view cashiers that exceed threshold values for multiple risk areas, like both Line Voids and No Sales, then the Alert filter expression would need to be set as follows (ensuring that there are applicable spaces left between the column name, operator, criteria value and OR)

(No Sales >= 10) OR (Line Voids >= 25)

Once the EVD option is enabled, the users that are assigned as recipients of the scheduled Adhoc will receive an EVD report in their email inbox for each cashier exceeding the alert expression(s). The report will be sent as a PDF attachment to the email.

Policy Notes

Policy Notes will automatically be included in the EVD report. The policy name is already configured to the applicable EVD KPI by a Micros-Retail resource. System Administrators and the System Managers can go to the Administration menu within the XBR Desktop to modify the text content of the policy note(s).

Watch Status

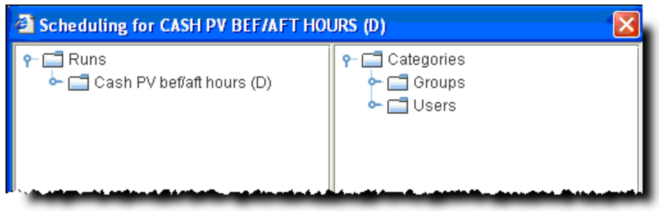
If the Watch Status and Notes are updated for a given associate, then this information will automatically populate the EVD report as well. The report will include the date that the associate was added to Watch as well as the applicable status level and any notes.

MODIFY A SCHEDULED QUERY

Scheduled queries can be modified by changing properties such as the frequency or the alert criteria, if an alert has been set.

How to Modify a Scheduled Query

1. Click the **Query List** option and select the scheduled query you would like to modify. Scheduled queries display a clock icon in the queries list.
2. Click the **Schedule** button.
3. Double-click the name of the scheduled query to access the **Schedule** dialog box (or right-click on the scheduled query name and select Edit Run Properties).



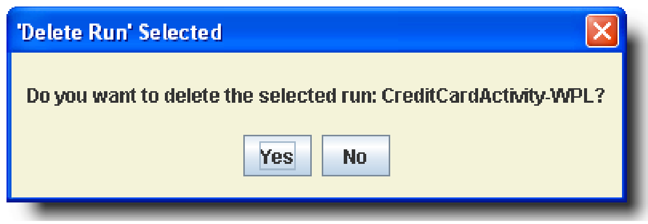
4. Make necessary edits.
5. Click the **Save** button.

DELETING A SCHEDULED RUN

Scheduled queries can be deleted so they no longer automatically run. This also removes any alerts that were associated with that scheduled query.

How to Delete a Scheduled Query

1. Click the Query List option and select the scheduled query you would like to delete. Scheduled queries display a clock icon in the queries list.
2. Click the **Schedule** button.
3. Right-click over the name of the scheduled query and select **Delete Run** from the short-cut menu.
4. Click **Yes** to confirm the deletion of the scheduled query.
5. Click the **Close** button.



SCHEDULED REPORT DISTRIBUTION PREFERENCES

A user profile can be customized in the Desktop Application of Analytics to indicate how scheduled queries and alerts will be received. The only time a user would not receive a query or alert this way is if the user setting up the scheduled query and distribution of the query selects the Override User Default option. If you do not have access to the Desktop Application of Analytics, contact your System Administrator to set up your user profile preferences.

How to Set Your User Report Distribution Preferences

1. When logged into the Desktop Application of Analytics, select **Administration -> User Profile** from the menu.
2. *(System Administrators only)* Double-click on the **User ID**.
3. Select the **Report Distribution** tab.

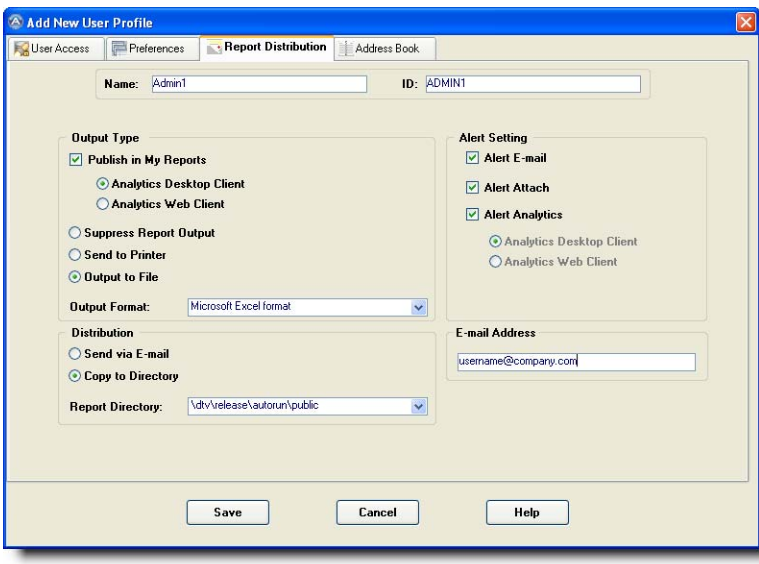


Figure 5-8: Report Distribution

4. Select the **Output Format** for reports. This is used when the user will receive scheduled reports and sent out automatically. If Offline reporting is being used, check Publish in My Reports. Select the application for which the user has access to: The Desktop or Web application. If both, then select which My Reports window they want to receive their reports.
5. Select one of the following **Output Types**:

   Suppress Report Output means that no query output will be generated. Use this if you are running queries to check for alert conditions only and you are not planning to send the query results to any users.

Send to Printer can be used to have the query sent directly to a printer. The printer used will be the default printer for the server that the Query Launcher runs on. If any users need to print reports on their local printer, they should have the query sent to them as a file, which they can then print themselves.

Output to File will write the query out as a file, which can be e-mailed to a user or copied to a directory. The file can be output in any of the file formats available to Analytics such as text, HTML, spreadsheet, or Analytics report format (PSR). Specify an Output Format from the drop down list.

6. Set how the alert will be received in the **Alert Settings** area:

   Alert Email - Click this option to have alert messages sent via email. The address in the **Email** text box is used for this option. It may be an Email address or a text pager address.

   Alert Attach - Click this option to send the query results as an attached report along with an alert warning via e-mail. This option isn't recommended if the alert were being e-mailed to a text pager. The file format is the format designated in the Output Format setting. Not available for the web Application.

   Alert Analytics - Click this option if you would like to review alert warnings in Analytics upon logging in.

7. In the **Distribution** area indicate if queries should be copied to a directory or sent as an attachment via email

   Send via E-mail - If the query will be e-mailed, enter an e-mail address. For multiple addresses, separate entries with a space.

   Copy to Directory - If the query will be copied to a directory, use the drop down arrow in the Report Directory area to specify where the file will be placed. The options that appear here are the servers' drive mappings, which are set up by the Database Administrator (DBA).

8. Click the **Save** button.

TROUBLESHOOTING SCHEDULED REPORTS?

This section provides solutions for problems that may occur with scheduling queries.

Problem 1:	**Cannot schedule queries.**
Solution:	Have the System Administrator modify the User Profile to be able to schedule queries. Scheduling access is assigned in each user's profile in the Desktop application. A System Administrator can login and turn the scheduling option on for any users who will be responsible for scheduling reports.

How to Set Up Users to Schedule Queries

1. When logged into the Desktop application of Analytics, select **Administration -> User Profile**.
2. Double-click the appropriate **User ID**.

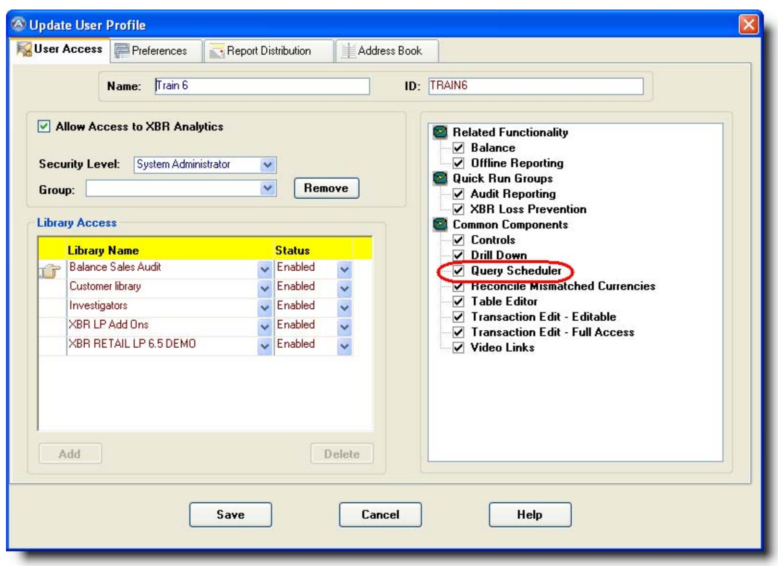


Figure 5-9: User Access Tab

3. On the **User Access** tab check the Query Scheduler option listed in the Common Components section.
4. Click the **Save** button. The next time this user logs in, he/she will be able to use the Schedule function.

Problem 2:	**Not receiving scheduled reports.**
Solution:	■ Go to the Query List and find the query. There should be a Schedule icon next to query name. ■ Select the query from the Query List and click the Schedule icon. Verify that the information on the Define tab is correct. ■ Verify the distribution settings for the scheduled query.

CHAPTER 6

Alert Reports

OVERVIEW

Alert reports are generated as an option when scheduling Adhocs to run automatically. Alert reports are generated when user-defined criteria are met. The reports can be viewed via email or within Analytics. If viewed within Analytics, then users can flag stores/cashiers to a "Watch" status, link to other Adhoc reports for more detail and use standard Analytics functionality like sorting and filtering when reviewing alert records.

LEARNING OBJECTIVES

Upon completion of this section, you should be able to:

- Access and review Alerts
- Close alert records
- Manage alert resolution activity

PROCEDURES

ALERT REPORTS

Alert reports automatically generate records that are detected based on user defined criteria for a specific time frame. For example, if a user required a report to display all cashiers that exceed 10 Post Void Transactions in a given week, then the Adhoc report would return just those results. The results of an Alert report can be reviewed in two locations, either email or the Analytics application (both desktop and web application versions).

Reading Alert Messages in Email

Email notifications can be sent to display alert messages. Users can e-mail a group of people, which can be defined in Analytics Desktop. The Adhoc query that caused an alert can be emailed as an attachment. This is defined in the user's profile.

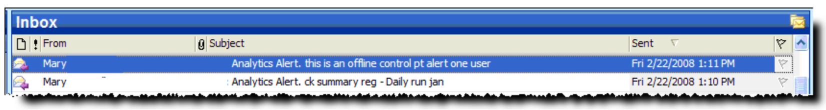


Figure 6-1: Alert Messages in Email

Reading Alert Messages in Analytics

Alert messages can be read via the **Alert** window on the Home page of Analytics. Alerts can also be accessed by clicking the **Alerts** link on the side menu. New and unread alerts will display in bold font.

How to Access and View Alerts

1. If Alerts are not currently displayed, click the **Alerts** link on the side menu. The Alert list displays.
2. Alert notifications can be sorted by **Alert Classification** or by **Date**.

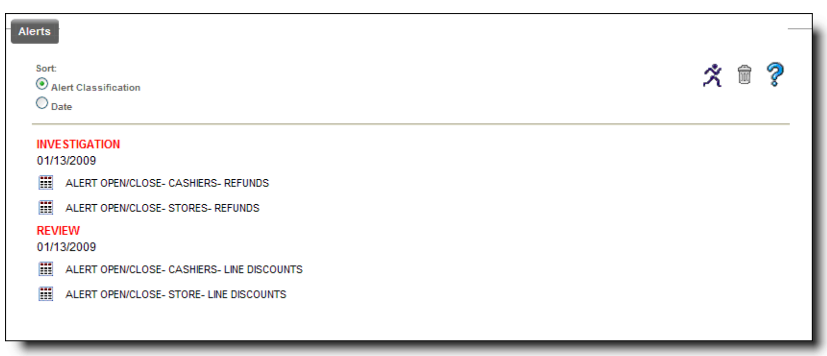


Figure 6-2: Alert List

3. Select an alert message and click one of the following buttons:

   Run - Displays the query results that generated the alert. Users can also double-click an alert to display the query. The records that met the Alert condition will be displayed in the query. If the alert is defined to show all records, the entire report will be displayed with the alert records that met the Alert condition highlighted in yellow.

   Delete -Removes the selected alert from the Alerts window. Use this after you have read an alert and reviewed the query results that generated it.

Alert reports are separate from Adhoc reports in the sense that they are based on user-defined criteria and are automatically generated whereas Adhocs are delivered as a set of standalone reports that are always available to retrieve data for any time frame at any given point in time.

Although Alert reports are automatically generated and only display records that meet user-defined criteria, they are also different from the Exception reports in that the Exception reports establish historical statistics and patterns in transaction activity whereas Alert reports do not.

Open vs. Closed Alert Records

Alert reports automatically display "open" records. An Open record is defined as a record that does not have an updated Resolution Status or Note attached to it. Once a record is reviewed, a user can easily update the status of that record by adding the record to a Watch Status to that record. Once this is done, the record is considered "closed" in terms of an Alert record.

The "Open" alert record feature is only activated when the following column headings are part of the Adhoc query build:

- Resolution Date
- Resolution Status

How to "Close" an Alert Record

1. Click the **Alert** link from the menu bar on the Left.
2. Double click the applicable Alert report from the Alert portlet.
3. Select an alert record (a row of activity).

4. Click either the **Store Watch Status** or **Employee Watch Status** buttons from the toolbar.

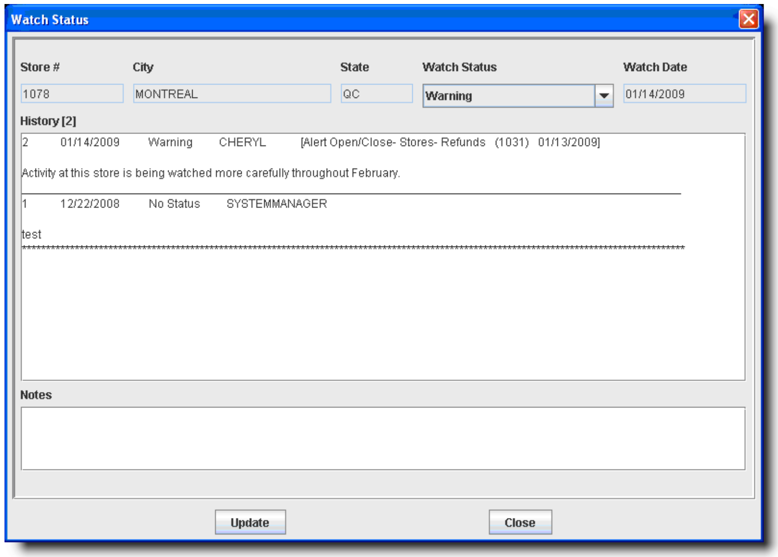


Figure 6-3: Watch Status

5. Click the **Watch Status** drop down and select an applicable level of watch status.
6. Click in the **Notes** section at the bottom and type a note relative to the record and why it is being placed on a Watch status.
7. Click the **Update** button. Since the record is automatically updated to "Closed" status, it no longer appears in the report.

How to View Closed Alert Records

1. Open an Alert report.
2. Click the **Filter** button.

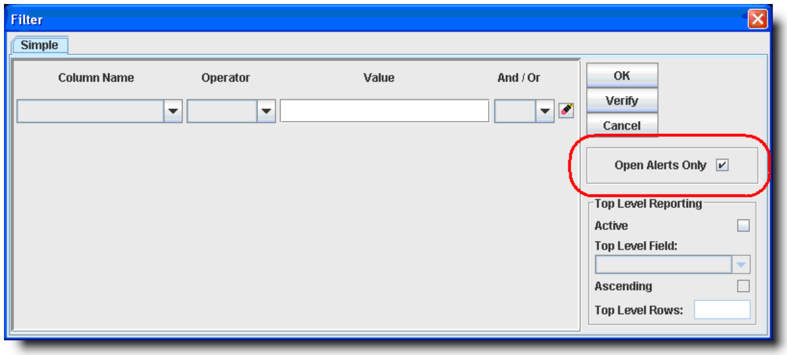


Figure 6-4: Simple Filter

3. Click **Open Alerts Only** to de-select the option.
4. Click **OK**. The report will now display all Alert records regardless of whether they are "Open" or "Closed".

TROUBLESHOOTING

If the option to filter "open" or "closed" alert records does not exist, then the original Adhoc report is missing the required column headings or this feature is not enabled in your deployment. A user within your organization with System Administrator rights will need to modify the query build on the desktop by adding the required fields and updating the column headings accordingly. They can refer to the XBR Intermediate Training Guide for further assistance on building and modifying Adhoc reports.

C H A P T E R 7

Exception Review

OVERVIEW

This section will cover reviewing exceptions in the Web Application. The Controls are run on the Desktop Application and can be reviewed on the Web application from the Review window. From an Exception set you can drill down to the detail, see previous exceptions and link to an Adhoc.

LEARNING OBJECTIVES

Upon completion of this section, you should be able to:

- Navigate and understand the Exception Review screens
- Display details of each exception set
- Change the Status of the exception
- Link to the Adhoc for more details about the exception

EXCEPTION OVERVIEW

Exception review is available in the Web Application Main Menu. Controls are run in the Desktop Application and users accessing the Web Application can review the exceptions. Controls (Control Points and Control Groups) are a special type of query designed to let you capture and track exception conditions. Controls are based on Adhoc queries. When reviewing the exceptions that have been run, you can drill down and link to the appropriate Adhoc to review details behind the exceptions, look at exception history, maintain notes on how you deal with specific exceptions, and perform other tasks to help you resolve exceptions and improve the performance of your stores and associates. Controls identify activity that exceeds a threshold over a specified period of time.

- The Exceptions option on the Main menu will take you to the Review Screen. This is where you can review Exception Sets and the details of Controls that were run in the Desktop Application.
- Controls maintain a history of exceptions, which allows you to pinpoint troublesome trends or identify training issues. Controls show when a pattern is developing and quickly identify repeat offenders by displaying:
  - A red flag
  - The number of previous exceptions
  - The date range in which the last exception occurred
  - Default exception history graph
- Scheduled Controls from the Desktop Application can automatically Alert users when there are excessive previous occurrences or when an Alert threshold, customized for your business, has been surpassed.
- When researching a Control query in Analytics, a stoplight signals users that an Alert condition has been detected.
- You can add Resolution notes to maintain comments about how you are researching an exception. This can be a convenient area to document any corrective action that is taken. Each entry is time/date stamped and lists your User ID.
- Unlike Adhocs, reports generated by Controls are saved on the Review screen. This allows all users to access exceptions that are detected without having to run the same query multiple times.
- If your organization has implemented Store Group Security be aware it will alter the way exceptions are calculated and the exceptions that display for each user.

Exception review lets you review, track, resolve and manage the exceptions that have been run. Exceptions are presented through a series of windows that let you drill down to see the detail behind each set of exceptions. You will drill down through the following three windows:

Window	Description
Exception Set	All of the exception sets that have been found according to the criteria of the control point.
Exception Review	Lists the individual exceptions within each set. The ones with the most exceptions or the greatest deviation from the threshold value will be listed first.
Exception Detail	Details regarding the individual exception. Displays any previous exceptions, the actual value, the threshold value, rank score and rank. Exception history is also provided on this screen.
Analytics Adhoc Queries	Additionally, you can link to Adhoc queries from the Exception Details window to further research the exceptions.

Display Exceptions

1. Click the **Exceptions** option on the Main menu. The Exception Set screen will display. This is where you can review Exception Sets and the details of Controls that were run in the Desktop Application.

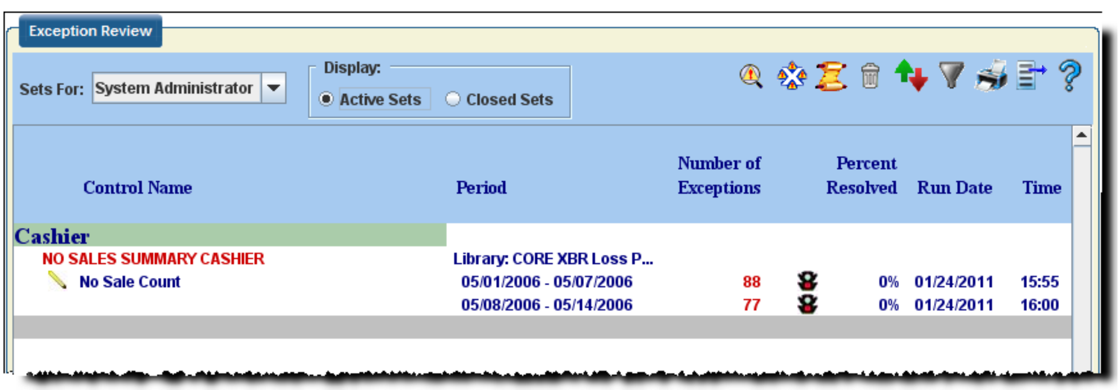


Figure 7-1: Exception Review Window

EXCEPTION SETS

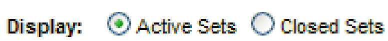
The Exception Sets screen displays the exception sets that have been generated in the Analytics Desktop Application, either manually or automatically run. The exception sets displays the following information about the exceptions found:

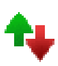
- A header record, which tells you, the name of the Query.
- The Library the query is located in.
- The control point name.
- The date range the control was run for.
- The number of exceptions found.
- In Parenthesis (X) the number of exceptions found if Top X level reporting was used.
- A stoplight if an alert was set.
- The percent resolved (used to track which exception sets have been investigated and resolved. If the percent resolved is less than 100%, then the corresponding set still has some open exceptions).
- The run date and time.
- The user who ran the control.

Exception sets are listed according to the user who ran the Control Point or Control Group or which user was assigned to review the exception set. To review an exception set generated by another user, click Sets For drop down list box and choose a different user name. Listed will be the controls that were run and assigned to the selected user.

> When reviewing Exception sets the total number of exceptions listed may not be the total number displayed. This occurs if the Store Group Security feature is in place at your company. You will only see the exceptions that are in your assigned stores or groups.

There are a number of housekeeping tasks that may be performed on this window. An exception set may be closed (and reactivated if necessary), deleted from the list but saved to a history file or deleted entirely from the system. The list may also be sorted or filtered to help you zero in on specific exception sets. You may select multiple records to delete, close, activate, commit to history.

Button	Function
 Close  Activate  	Highlight the set of exceptions and click the Close Set button. This option is provided simply to help clean up your screen by moving some exception sets from the Active Sets to the Closed Sets display. The Closed Set button provides a different window (or folder) to store exception sets in. No information or functionality is lost this is simply a means of making the exception list more manageable. For example, when you have resolved all of the exceptions in a set, you might want to move it to the closed list. This way, you can still review the set if you want to but it won't clutter up your list of open sets. When you are sure that you no longer need to review the set, you can remove it permanently from the list by committing the exceptions to history or deleting them. You may switch between lists of closed and active exception sets by selecting either **Active Sets** or **Closed Sets** from the Display options. When looking at closed sets, you can move a set back to the active list by clicking the **Activate Set** button (the **Close Set** button changes to **Activate Set** when you are looking at closed sets).
	Deletes the highlighted exception set header from your list but saves the individual exceptions associated with the set to a history file. When future exceptions sets are generated, those exceptions that are saved to the history file will display with a previous exception flag, thus establishing previous activity in history for that employee, store or account number.

Button	Function
	All exceptions associated with this set will be deleted and no history of the exception set will be maintained anywhere in the system. Deleting old sets of exceptions will impact more recent sets of exceptions where previous exceptions were detected for a given employee, store or account number. For example, if cashier #348965 displays "5" previous exceptions, but a previous exception set is deleted, then the number of previous exceptions will change to "4". You may want to delete all of the exceptions generated by a query if you ran the query for the wrong date range or if the threshold value you set was too low, resulting in an excessive number of exceptions.
	Display Exception Review screen. Highlight the set by clicking on it then choose the Review Set button, or double-click the exception set.
At this and other levels of the review, you have several options available to help you work with the results:	
	Go back to the previous screen.
	Change the sort order of the results. **Note:** You can also perform a quick sort by clicking the column heading for the column you wan to sort by.
	Filter the results.
	Prints the information displayed in the open window in a PDF format.
	Export the results to an Excel format, PDF, or comma-delimited format.

EXCEPTION REVIEW

The Exception Review window lists all stores, associates, etc. in the exception set selected previously from the Exception Set. The results depend on the level at which the Control Point or group was created. For example, if you ran a Control Point to look for stores with exceptions, you will see a list of stores. If you ran a query to catch associate-level exceptions, you will see a list of associates, etc.

The list of exceptions shows all stores, associates, etc. that were found to have exceptions during the run of the Control Point or group that created this exception set. The data is sorted by Actual Value column. Those with a higher number of exceptions, or with more serious exceptions, are at the top of the list. A Control Group is sorted by the Overall Rank column.

How To Review Exceptions

1. From the Exception Set screen double click an Exception Set to review the exceptions.

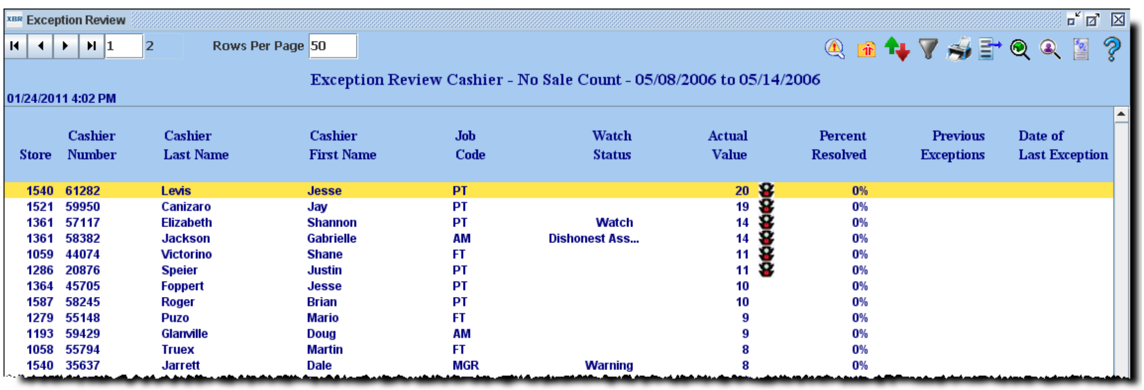


Figure 7-2: Exception Review

TIP

You can change exceptions sets to select by changing the ***Sets For*** *option. This option is who the exceptions were assigned to when they were run on the Desktop App.*

The **Exception Review** screen displays the following:

- The **Store** and/or **Associate** - depending on what the exception was run for.
- The **Actual Value** displays the value the store or associate received according to the criteria for a single control that is run. For a Control Group the actual value displays in each Control column. Next to the actual value in parenthesis is the individual rank for that specific control.
- A stop light icon displays if there has been an alert set and the exceptions have met the criteria of the alert.
- The **Percent Resolved** column is used to track, which stores or associates have had their exceptions investigated and resolved. If the percent resolved is less than 100%, then the corresponding store or associate still has some open exceptions in this set. See page 3-15 for details on how to change the Percent.
- **Previous Exceptions** and **Date of Last Exception** columns lists if the store or associate has had past exceptions, along with a red flag that will display next to this column. The number of previous exceptions and the date of the last exception (prior to this one) will be displayed. If this is the case, you can get more details by double clicking and drilling down to the Exception detail report.
- **Watch Status** - The status of the Store or Associate. You can add or edit the status. See Chapter 3, “Managing Query Results" on page 31 for details.
- **Overall Rank** - Control Group only - Displays the Overall ranking based on the individual controls that make up the group. NOTE: If the Control Target used for the Control point or Control group has the Rank Score/Overall Score featured active (checked), there will be an additional column. Rank Score will display for a single Control, which ranks the exceptions form highest (worst offenders) to lowest. For a Control Group the column Overall Score will display, which shows you the overall score of the combined controls that make up the group

From the **Exception Review** screen you can:

Button	Function
	Select a row and click the **Exception Detail** button to review specific details about the exception being investigated.
	Select a row and click the **Store Detail** button (if available) to view specific store information from the Store Master such as Store Manager name and Store phone number. Close this window to return to the Exception Review screen.
	Select a row and click the **Associate Detail** button (if available) to view specific information about the employee from the Employee Master such as hire date and job code. Close this window to return to the Exception Review screen.
	Add or change the Watch Status of the Store. See Chapter 3, “Managing Query Results" on page 31 for details.

Button	Function
	Add or change the Watch Status of an Associate. See Chapter 3, “Managing Query Results" on page 31 for details.
You can also, Sort, Filter, Print, Export and Go back to the previous screen. See page 61 for details.	

Exception Details

The Exception Details window lists all of the individual exceptions that were found for a particular store, associate, etc. during the run of the Control Point or Group that created the exception set. This is the level at which exceptions can be closed. When an exception has been closed, it means that it has been investigated and resolved. There is also the Exception History on this window, which lists previous exceptions for the store or associate selected.

How To Display Exceptions Details

1. From the **Exception Review** screen double click an Exception to display the details of the exception.

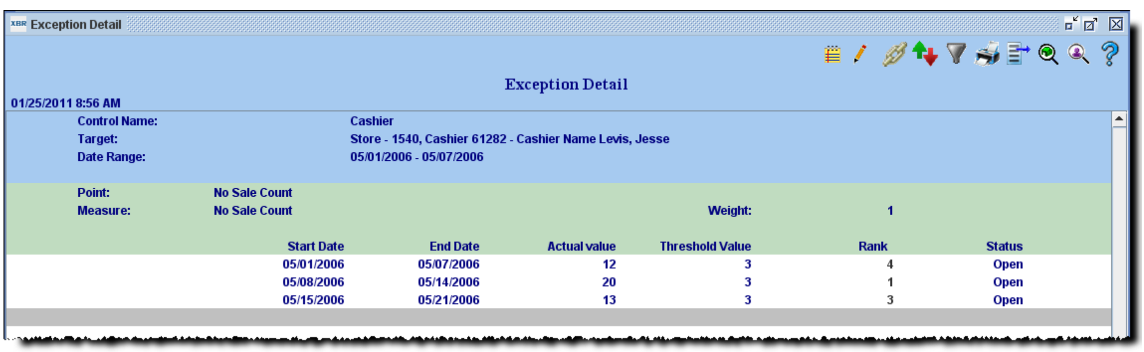


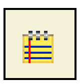
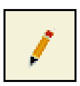
Figure 7-3: Exception Detail Window

The **Exception Detail** screen displays the following:

- The **Control Name**, **Target**, and **Date Range** are at the top of the query - This shows you the control that was run along with the Store and/or cashier you selected from the Exception Review screen.
- **Control Point and Measure** - Indicates which was used to find the exceptions.
- **Start** and **End** dates - The dates the exception occurred between. If there are multiple dates listed than there have been previous exceptions for this store or cashier.
- **Weight** - Single control points are assigned a weight of one, which is used in the Rank Score calculation.

- **Actual Value** - The actual activity that occurred during the time frame that the control point ran.
- **Threshold Value** - The customized criteria above which to detect exceptions.
- **Rank** - The placement of this exception compared to all of the other exceptions with 1 being the worst offender.
- **Status** - Can be changed to the following options: Open, In Progress or Closed.
- **Resolution Note** icon  - Displays if a Resolution note has been created for this exception.
- **Previous Exceptions** - Are listed by date.
- **Alert** icon - A traffic light  appears when an Alert threshold has been exceeded or when there are excessive repeat occurrences.

From the **Exception Detail** screen you can:

Button	Function
	Add, edit or view notes for this store or associate. You can add a resolution note if there is not one created. If there is a note already added for the store or associate the icon  will display.
	To identify those exceptions, which you have reviewed and resolved to your satisfaction you can change the Status for each exception. All exceptions are open to begin with, you have the choice of changing the status to In Progress or Closed. An "In Progress" exception is considered 50% closed in the percent resolved calculation. When you close the Exception Detail window, you will see a change in the Percent Resolved column for this store, or associate in both the Exception Sets and Exception Review windows. The status allows you to keep track of any sets that still have open exceptions.
	You can link to Adhoc queries for additional information related to the highlighted exception.
You can also, Sort, Filter, Print, Export and Go back to the previous screen. See page 61 for details.	
You can also add or change Store and Employee Watch list status, see page 64 for details.	

Linking to an Adhoc from the Exception Detail screen

How To Link to Adhocs

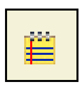
1. From the **Exception Detail** window, verify the exception is selected. You can select more than one row to link on multiple weeks of history.

Use the **[Ctrl]** or **[Shift]** key to select more than one week of exception history.

2. Click the **Link** button. If there is more than one query available to link to, the **Select a Query to Link** to dialog box will display.
3. Double click a query from the list to run and display the results.
4. After reviewing the Adhoc you can return to the **Exception Detail** window to update the **Status** or post a **Resolution Note**, by selecting the Exception Detail report from the windows toolbar.

Adding Resolution Notes

How to Add Resolution Notes

1. Select an Exception from the Exception Detail screen
2. Click the Resolution **Note**  button.

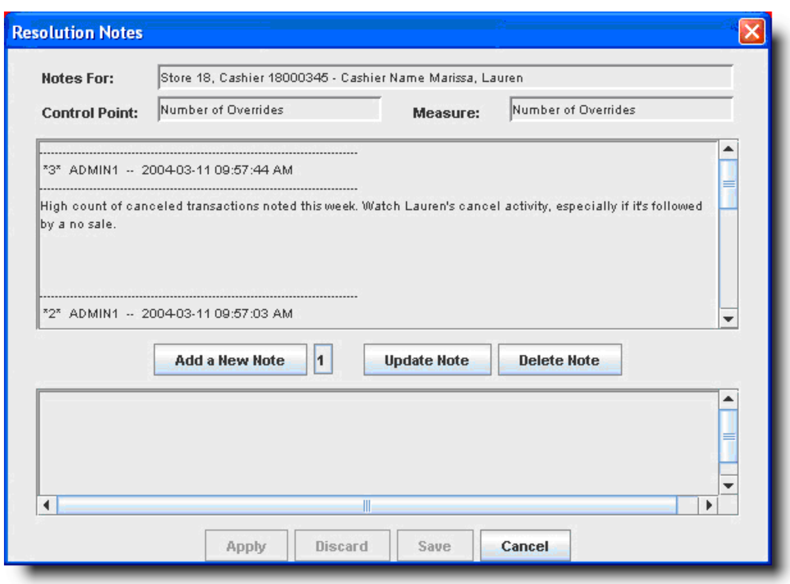


Figure 7-4: Resolution Note Dialog Box

3. Click the **Add a New Note** button.

4. Type the note in the bottom text box.
5. Click the **Apply Add** button. Who added the note, the time and number of the note is recorded.
6. Click the **Save** button.
7. Click the **Cancel** button to close the dialog box.

How to Edit and View Resolution Notes

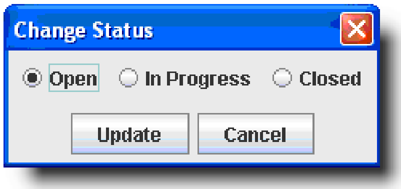
1. Select an Exception with a Resolution Note already created.
2. Click the **Resolution Note** button.
3. Select which note number from the drop down list to edit.
4. Click the **Update Note** button.
5. Make necessary changes to the note.
6. Click the **Apply Update** button.
7. Click the **Save** button.
8. Click the **Cancel** button.

Change the Exception Status

The Status and Percent Resolved columns are used to track which stores or associates have had their exceptions investigated and resolved. If the percent resolved is less than 100%, then the corresponding store or associate still has some open exceptions in this set.

How to Change The Exception Status

1. Select an Exception from the Exception Detail screen.
2. Click the **Change Status** button. The Change Status dialog box is displayed.



3. Select **In Progress** or **Closed**.
4. Click the **Update** button. The Exception will display the option you selected in step 3. When you go back to the **Exception Review** screen the Percent Resolved fields will display 50% if you selected **In Progress** or 100% if you selected **Closed**.

XBR

C H A P T E R 8

Customizing the Home Page

OVERVIEW

The Dashboard allows users to customize the look of their Home page, add new pages and personalize existing pages.

LEARNING OBJECTIVES

Upon completion of this section, you should be able to:

- Customize your Dashboard screen
- Personalize pages with color schemes and layout

PROCEDURES

CHANGING CONTENT

The **Content** icon allows users to change color preferences, personalize pages, and change the layout of the Dashboard. Upon clicking the **Content** icon, the following screen will appear.

There are two options at the top of the window:

- Change Colors
- Personalize Pages

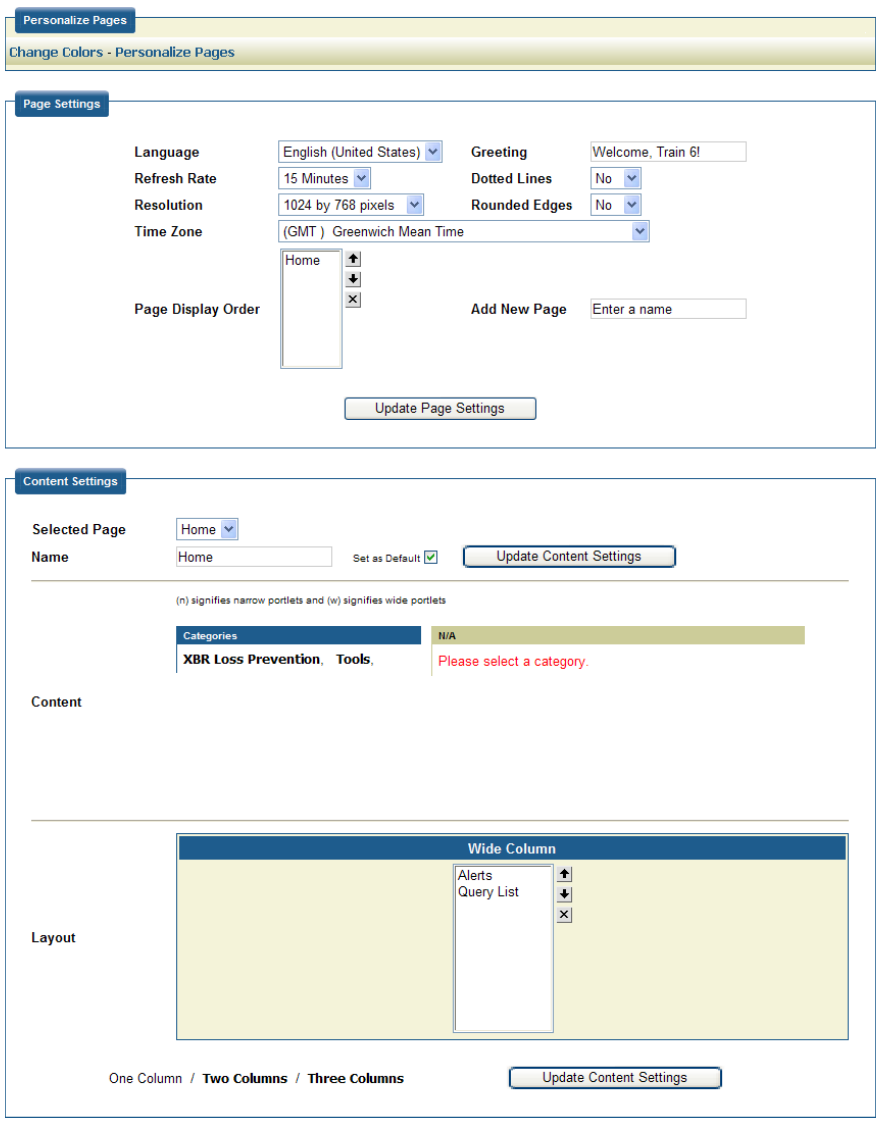


Figure 8-1: Dashboard

Changing Color Preferences

Users can either click pre-designed color scheme for pre-selected color combinations or they can click the Custom Theme link which allows users to create their own color scheme, such as creating a scheme that uses the company's logo colors.

To change color preferences, click on the **Change Colors** option.

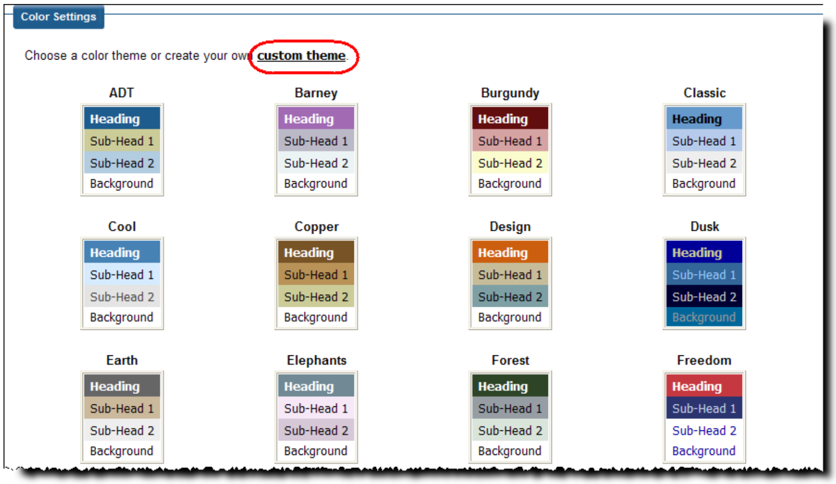


Figure 8-2: Color Settings

To select a pre-determined color scheme, users need to click the title of one of the options displayed. The change will occur instantaneously. Users can then click the Home Link on the far left to return to the home page. The new color scheme will be immediately reflected.

To create a custom color scheme, users need to click the **Custom Theme** link at the top of the color settings page.

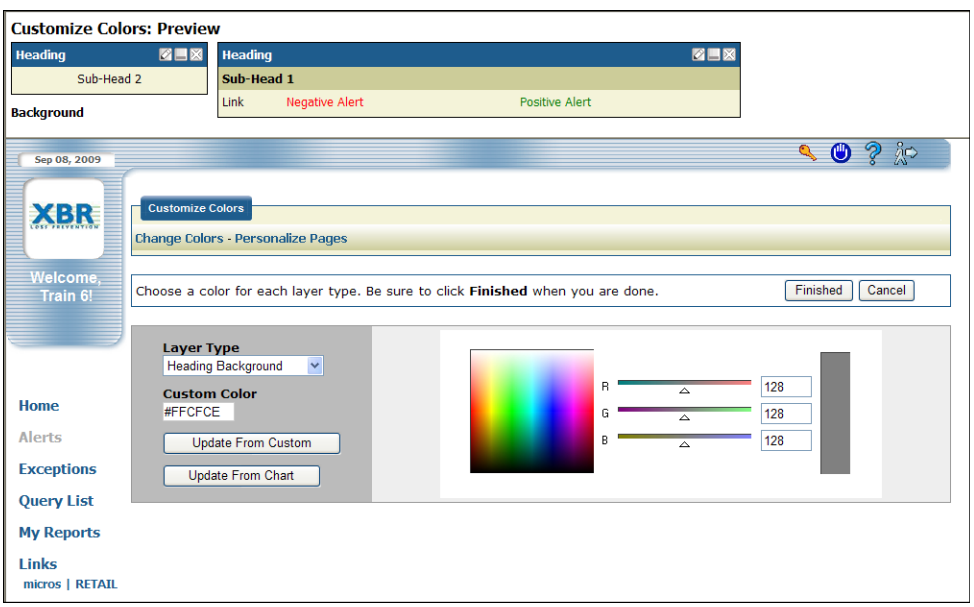


Figure 8-3: Custom Color Settings

Customizing color schemes using this method will require a variety of options. The **Layer Type** drop down list allows users to determine which part of the window the color will be reflected in. For example, if **Page Text** is selected, then the user can use the hue selections to determine the color that the text on the page will be displayed in.

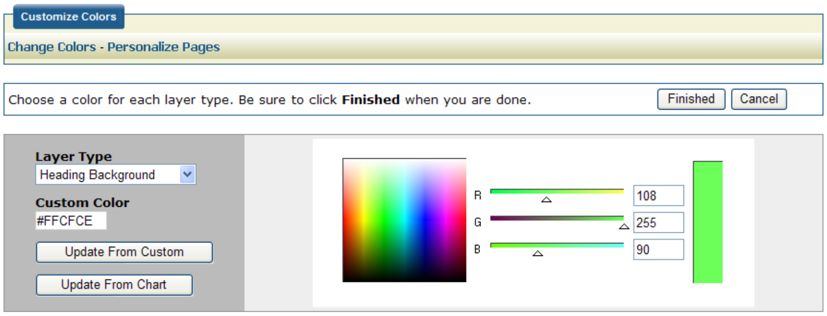


Figure 8-4: Customer Colors

Select the **Layer Type** from the drop down list. Use the following steps to change the color for the selected layer:

1. Enter the hex code for the color in the **Custom Color** text box.
2. Click the **Update from Custom** button.

   or

3. Use the color chart on the right to select the correct hues. To create a custom color using the color chart, do one of the following:

The new color is shown to the right of the chart.

   a. Click the color square to alter the color.
   b. Drag the triangles for the R, G, and B selections left or right.
   c. Type in the numeric values for the R, G, and B combination for the desired color.

4. Click the **Update From Chart** button to apply the color selection.
5. Use the **Layer Type** drop down menu to continue creating custom colors using steps 1 and 2 or 3 and 4.
6. Click the **Finished** button when colors have been selected and the custom color theme will be applied.

Personalizing Pages

Users can also use the Content icon to customize what they are viewing on their pages. For instance, some users may want to add the weather to their home page while other users may want to view the stocks. To personalize pages, users need to click the Content icon and then click on the Personalize Pages link. Three sections will be listed where users can customize each area of their pages independently:

- Page Settings
- Content
- Layout

The **Page Settings** section allows users to update current settings such as Time Zone and Greeting in addition to updating the page display order of links on the left side menu or add a new page with personalized content. Please refer to Adding a New Page.

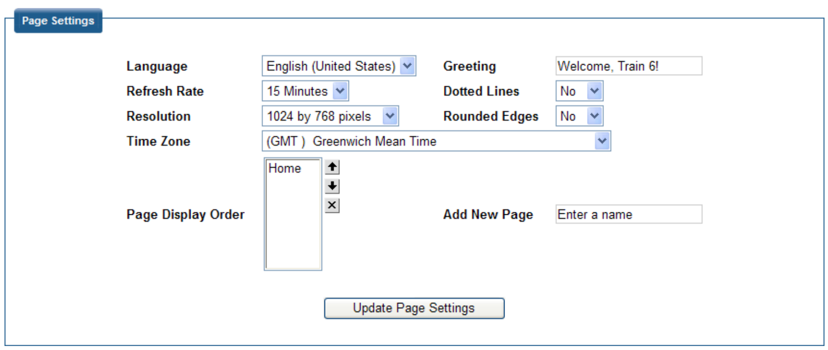


Figure 8-5: Page Settings

The **Content** section allows users to select one of the categories options on the right. The various menu options, like Query Lists, will be available within the Category and will be listed in the section on the right side. Users can check which options they prefer to set up as defaults on their home page(s). Upon selecting options, a check mark will appear in the adjacent box. These options will appear in the Layout area as described in the following section.

For example, selecting **XBR Loss Prevention** will display Alerts, Query Lists, My Report and XBR Exception Window as options to select:

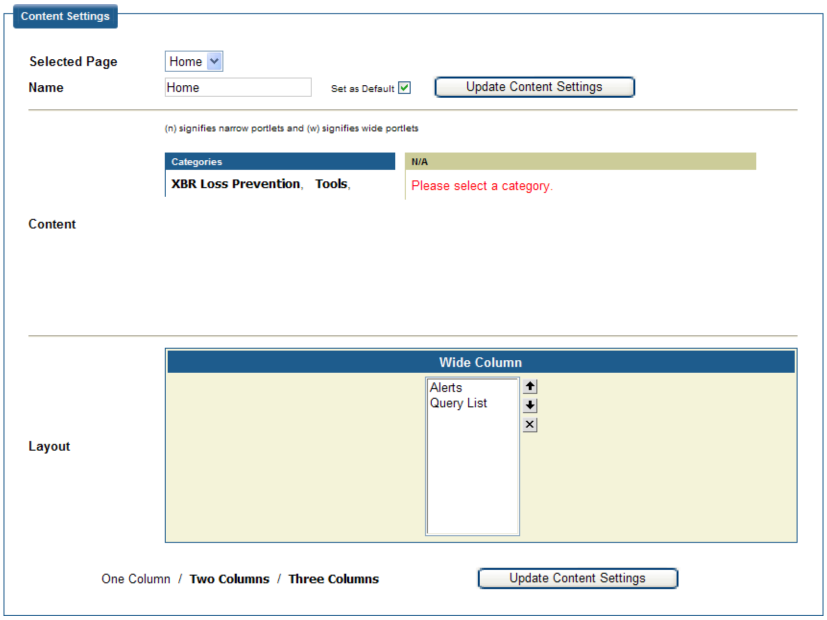


Figure 8-6: Content Settings

The (w) or (n) indicates Wide or Narrow portlet as explained in the column layout below.

The **Layout** section is used to determine how each of the selected items from the **Content** section will be displayed on the page. Contents can be displayed using a one, two or three column layout. Examples of the Layouts:

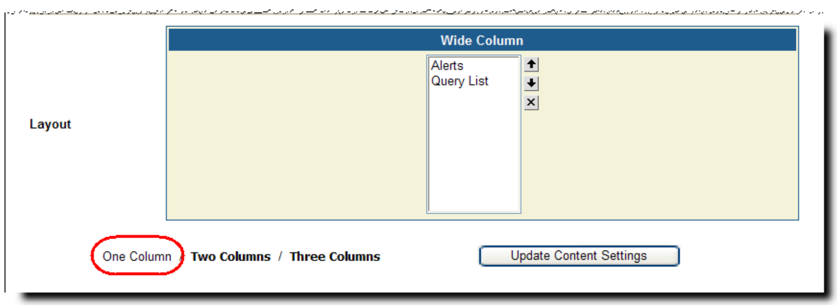


Figure 8-7: One Column Layout

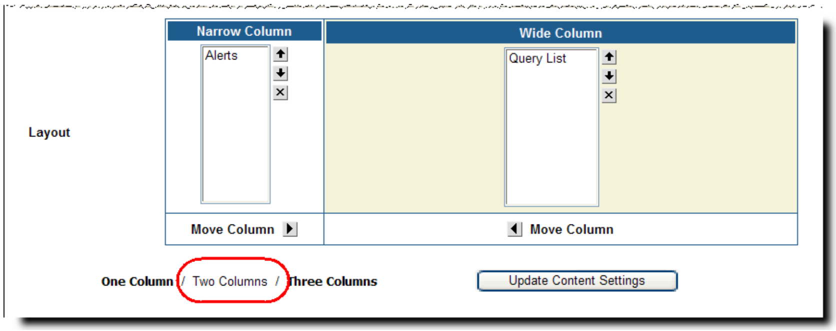


Figure 8-8: Two Columns with Narrow and Wide Selections

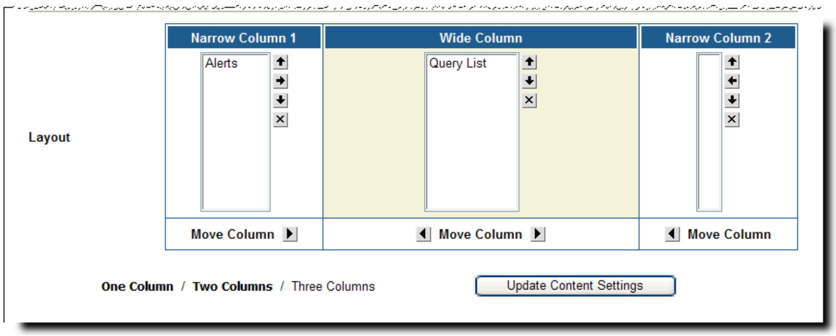


Figure 8-9: Three Column Layout

Applying Custom Settings

When users are finished making custom selections, click the **Update Content Settings** button at the bottom of the page. Click the page name's link on the left side menu to refresh the page. Custom selections will be automatically displayed once options have been updated.

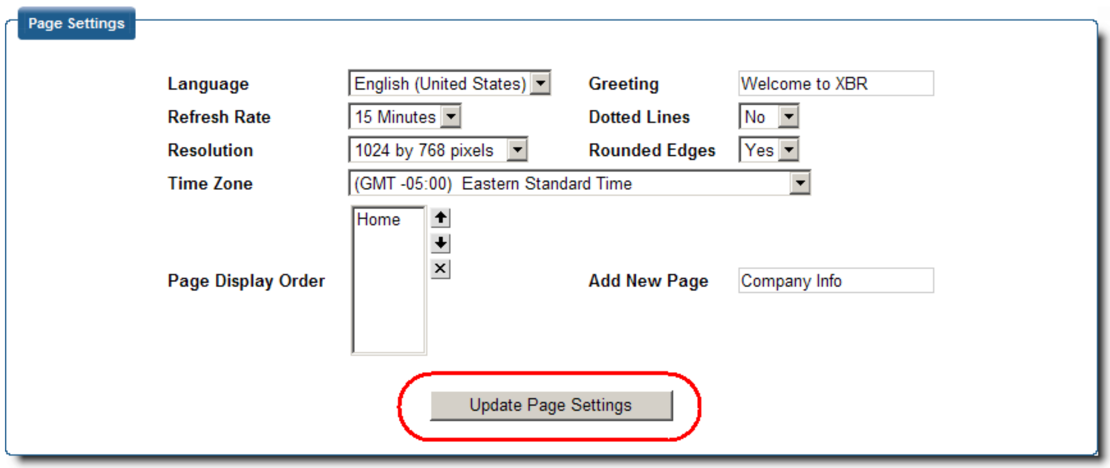
Updating Page Preferences

Each section of the page is referred to as a portlet. Each portlet has a **Minimize/Maximize** button in the upper right corner. When a portlet is minimized, the page displays with the header only displayed for that portlet. In a minimized portlet's window, the minimize button is replaced with a restore button, which is used to restore the portlet back into its default view.

When portlets are minimized and maximized, they are automatically resized to their default size when relaunching the web application.

Adding a New Page

Users can add new pages that will appear on the Application menu on the left side. Click the **Content** icon in the upper right corner of the screen. In the **Add New Page** field, type a name to describe the page.



Click the **Update Page Settings** button and the new page name will now appear in the **Page Display Order** to the left. It will also appear in the **Content Settings** section allowing the user to customize the information that will appear.

To add content to the new page, select from the **Category** options in the Content section and the selected options will appear in the column display in the Layout section that follows.

Click the **Update Content Settings** button when selections are complete. The new page name will appear in the links menu on the left. Click the new page name to view changes.

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