



Customized Dashboards Tutorial

1.

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Welcome Webinar Demo Logout

Dashboard's Name Dashboard 1

Export All Portlets Make Default

Add Data To This Snapshot

Add Data to this Snapshot

To create a new dashboard, first select the green "+" in the top right corner. Then name your dashboard and select "OK".

A screenshot of a web application interface for creating a dashboard. At the top right, there is a copyright notice and a link to 'View Full Copyright'. Below that is a navigation bar with 'Welcome Webinar Demo' and a 'Logout' link. The main area shows a form for 'Dashboard's Name' with the text 'Dashboard 1' entered. To the right of the text input are two circular icons: a green one with a white plus sign and a red one with a white minus sign. A blue callout box on the left contains text explaining the steps to create a new dashboard, with a blue arrow pointing from the text to the green plus icon. Below the form, there are two links: 'Export All Portlets' and 'Make Default'. At the bottom, there is a section titled 'Add Data To This Snapshot' with a green plus icon and a scrollable area containing the text 'Add Data to this Snapshot'.

2.

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Data Analysis | Reports | Account Management | Adm

Current Dashboard Period: September 2012

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Now that you've created your new dashboard, you'll notice that you now have eight blank "Dashboard Pods".

To add data to a "Pod," select the green "Customization" button in the top right corner.

3.

Title: []

Data Metric: Brand Growth

Time Period: Most Recent Month

Display Type: Table

Load By Default in Center Section:

Territories

- Total US
- Mid Atlantic
- Midwest
- Mountain
- Northeast
- Northwest
- Southeast
- Southwest

Select All Categories (except 60, 70, 71)

Select All Territories

Manufacturers: All Manufacturers Select Manufacturers

Brand: All Brands Select Brands

Update Cancel

The first step to customizing your "pod" is to give it a name. For example, Composite Share YTD or Scalars Growth, etc

4.

Title:

Time Period:

Data Metric:

Display Type:

Display Data As: Dollars Units

Load By Default in Center Section:

Categories: 07 Plastic Ware & Organizers 08 Disposables Select All Categories (except 60, 70, 71)

Territories: Total US Mid Atlantic Midwest Mountain Northeast Northwest Southeast Southwest Select All Territories

Manufacturers: All Manufacturers Select Manufacturers

Brand: All Brands Select Brands

5.

Title:

Time Period:

Data Metric:

Display Type:

Display Data As: Dollars Units

Load By Default in Center Section:

Manufacturers: All Manufacturers Select Manufacturers

Brand: All Brands Select Brands

Currently available Data Metrics include:

- Brand Growth: sales & market share by brand vs. prior period & year ago
- Category Share: dollar sales growth by category vs. prior period & year ago
- Manufacturer Share: sales & market share by manufacturer vs. prior period & year ago
- Pricing Trends: average unit price by brand or manufacturer vs. prior period & year ago
- Territory Share: sales & market share by territory vs. prior period & year ago

6.

The screenshot shows a data selection interface. At the top, there is a 'Title' field, a 'Time Period' dropdown set to 'Most Recent Month', and a 'Display Type' dropdown set to 'Table'. Below this, the 'Data Metric' is 'Brand Growth'. The 'Display Data As' section has radio buttons for 'Dollars' (selected) and 'Units'. There are two main selection panes: 'Categories' with tabs for 'Custom', 'Major', and 'All Categories', and 'Territories' with tabs for 'Custom' and 'Pre-Defined'. The 'Territories' pane lists regions like 'Total US', 'Mid Atlantic', 'Midwest', 'Mountain', 'Northeast', 'Northwest', 'Southeast', and 'Southwest'. At the bottom, there are 'Manufacturer' and 'Brand' selection options, both set to 'All'. 'Update' and 'Cancel' buttons are at the bottom center.

You can then decide whether you'd like to view your data as Dollars or Units. This is helpful when you'd like to look at Market Share or Sales Volume on a unit basis rather than a Dollar basis.

7.

The screenshot shows the same data selection interface as in step 6. The 'Time Period' dropdown is now set to 'Most Recent Month'. The 'Display Type' dropdown is set to 'Table'. The 'Categories' pane is expanded to show a list of categories: '01 Alloys & Accessories', '02 Anesthetics', '03 Cements/Liners/Bases', '04 Restoratives', '05 Prosthetics', '06 Bonding Agents', '07 Plastic Ware & Organizers', and '08 Disposables'. The 'Territories' pane shows 'Northwest', 'Southeast', and 'Southwest'. The 'Update' and 'Cancel' buttons are at the bottom center.

You then need to define a time period for your data. Depending on your current data subscription you may either see Monthly-based options or Quarterly-based options.

8.

The screenshot shows a dashboard configuration interface. At the top, there is a 'Title' field, a 'Time Period' dropdown set to 'Most Recent Month', a 'Data Metric' dropdown set to 'Brand Growth', and a 'Display Type' dropdown set to 'Table'. Below these are radio buttons for 'Display Data As' (Dollars selected) and 'Units'. A 'Load By Default in Center Section' checkbox is present. The main area contains two selection windows: 'Categories' and 'Territories'. The 'Categories' window has tabs for 'Custom', 'Major', and 'All Categories', with a list of categories from 01 to 08 and a 'Select All Categories' option. The 'Territories' window has tabs for 'Custom' and 'Pre-Defined', with a list of regions and a 'Select All Territories' option. At the bottom, there are 'Manufacturer' and 'Brand' selection options, and 'Update' and 'Cancel' buttons.

Dashboards are most commonly viewed as Tables. However, some data metrics allow you to view your data as a chart. For example, Pricing Trends can be viewed as a line graph. This can be very helpful when comparing the pricing trends of competitive brands.

9.

This screenshot is identical to the one above, showing the dashboard configuration interface. A blue callout box is overlaid on the 'Categories' selection window. An arrow points from the callout box to the '04 Restoratives' category in the list. The callout box contains the following text:

The Category selection window works similarly to other areas of the portal. Just select which category, or categories you wish to view or select all categories.

10.

Title:

Time Period:

Data Metric:

Display Type:

Load By Default in Center Section:

Display Data As: Dollars Units

Categories

Custom Major **All Categories**

- 01 Alloys & Accessories
- 02 Anesthetics
- 03 Cements/Liners/Bases
- 04 Restoratives
- 05 Prosthetics
- 06 Bonding Agents
- 07 Plastic Ware & Org
- 08 Disposables

Select All

Territories

Custom Pre-Defined

- Total US
- Mid Atlantic

Manufacturer: All Manufacturers Select Manufacturers All Brands Select Brands

To view minor or sub-minor categories, select the "All Categories" tab.

11.

Title:

Time Period:

Data Metric:

Display Type:

Load By Default in Center Section:

Display Data As: Dollars Units

Categories

Custom Major **All Categories**

- 01 Alloys & Accessories
- 02 Anesthetics
- 03 Cements/Liners/Bases
- 04 Restoratives
- 05 Prosthetics
- 06 Bonding Agents

Territories

Custom Pre-Defined

- Total US
- Mid Atlantic
- Midwest
- Mountain
- Northeast
- Northwest
- Southeast
- Southwest

Select All Territories

Manufacturer: All Brands Select Brands

Next, you need to select the territories you'd like to view. To view all data, select "Total US." If you have custom territories set-up, you can select those by choosing the "Custom Tab." This is very useful when viewing the "Territory Share" metric.

12.

Title:

Time Period:

Data Metric:

Display Type:

Display Data As: Dollars Units

Load By Default in Center Section:

Categories: Custom Major All Categories

- 01 Alloys & Accessories
- 02 Anesthetics
- 03 Cements/Liners/Bases
- 04 Restoratives
- 05 Prosthetics
- 06 Bonding Agents
- 07 Plastic Ware & Organizers
- 08 Disposables

Select All Categories (except 60, 70, 71)

Territories: Custom Pre-Defined

Manufacturers: All Manufacturers Select Manufacturers

Brand: All Brands Select Brands

Now, select the Manufacturers you'd like to view in your report. If you'd like to view the market as a whole, select "All Manufacturers." If you'd like to select specific manufacturers, choose "Select Manufacturers" then select and add them.

13.

Title:

Time Period:

Data Metric:

Display Type:

Display Data As: Dollars Units

Load By Default in Center Section:

Categories: Custom Major All Categories

Territories: Custom Pre-Defined

- US
- Atlantic
- West
- East
- South
- North
- South West
- North West
- South East
- North East

Select All Territories

Manufacturers: All Manufacturers Select Manufacturers

Brand: All Brands Select Brands

Then, select which Brands you'd like to be included in your report. Similar to the Manufacturer select, you can choose to view "All Brands" or pick and choose your brands using the "Select Brands" option.

14.

Title:

Time Period:

Data Metric:

Display Type:

Display Data As: Dollars Units

Load By Default in Center Section:

Categories

Custom Major All Categories

- 01 Alloys & Accessories
- 02 Anesthetics
- 03 Cements/Liners/Bases
- 04 Restoratives
- 05 Prosthetics
- 06 Bonding Agents
- 07 Plastic Ware & Organizers
- 08 Disposables

Select All Categories (except 60, 70, 71)

Territories

Custom Pre-Defined

- Total US
- Mid Atlantic
- Midwest
- Mountain
- Northeast
- Northwest
- Southeast
- Southwest

Select All Territories

Manufacturer: All Manufacturers Select Manufacturers

Brand: All Brands Select Brands

Finally, select "Update" and your dashboard pod will be created.

15.

Current Dashboard Period:

View Parameters For Data Below

Test Dashboard

Category	Period Sales	Qtr (Prior P)
Alloys & Accessories Amalgam Capsules	\$2,905,397.19	-14.8
Alloys & Accessories Amalgam Pellets	\$21,695.49	64.7
Alloys & Accessories Amalgam Powders	\$12,527.38	-42

A red outline around a pod indicates it is the currently "active" pod.

Add Data To This Snapshot

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Add Data to this Snapshot

Category	Time Period: Most Recent Month	Territory: Total U.S.	Manufacturer: All	Brand: All
	Period Sales	Growth (Prior Per.)	Growth (Last Year)	
Alloys & Accessories Amalgam Capsules	\$2,905,397.19	-14.84 %	-8.55 %	
Alloys & Accessories Amalgam Pellets	\$21,695.49	64.75 %	52.27 %	
Alloys & Accessories Amalgam Powders	\$12,527.38	-42.00 %	51.87 %	
Alloys & Accessories Amalgam Waste Management	\$72,253.64	-11.89 %	17.06 %	
Alloys & Accessories Amalgamators	\$311,258.39	8.65 %	-26.11 %	

16.

Current Dashboard Pending

By selecting the blue "+" in the left hand corner of any pod, you can make it the "active" pod and the data of that pod will be displayed in the larger, center area of the dashboard.

Add Data To This Snapshot

Category	Time Period	Most Recent Month	Territory	Total U.S.	Manufacturers	All	Brand	All
Category	Period	Sales	Growth (Prior Per.)	Growth (Last Year)				
Alloys & Accessories Amalgam Capsules	\$2,905,397.19	-14.84 %	-9.55 %					
Alloys & Accessories Amalgam Pellets	\$21,695.49	64.75 %	52.27 %					
Alloys & Accessories Amalgam Powders	\$12,527.38	-42.50 %	51.87 %					
Alloys & Accessories Amalgam Waste Management	\$72,253.64	-11.69 %	17.06 %					
Alloys & Accessories Amalgamators	\$311,258.39	8.65 %	-26.11 %					

17.

Current Dashboard Pending

By selecting the blue "+" in the left hand corner of any pod, you can make it the "active" pod and the data of that pod will be displayed in the larger, center area of the dashboard.

Add Data To This Snapshot

Category	Time Period	Most Recent Month	Territory	Total U.S.	Manufacturers	All	Brand	All
Category	Period	Sales	Growth (Prior Per.)	Growth (Last Year)				
Alloys & Accessories Amalgam Capsules	\$2,905,397.19	-14.84 %	-9.55 %					
Alloys & Accessories Amalgam Pellets	\$21,695.49	64.75 %	52.27 %					
Alloys & Accessories Amalgam Powders	\$12,527.38	-42.50 %	51.87 %					
Alloys & Accessories Amalgam Waste Management	\$72,253.64	-11.69 %	17.06 %					
Alloys & Accessories Amalgamators	\$311,258.39	8.65 %	-26.11 %					

18.

Current Dashboard Period: [Dropdown]

View Parameters For Data Below

Test Dashboard

Category	Period Sales	Growth (Prior Per.)
Alloys & Accessories Amalgam Capsules	\$2,905,397.19	-14.8%
Alloys & Accessories Amalgam Pellets	\$21,695.49	64.7%
Alloys & Accessories Amalgam Powders	\$12,527.38	-42.5%

Add Data To This Snapshot

Add Data to this Snapshot

Table:

Category	Time Period	Most Recent Month	Territory	Total U.S.	Manufacturers All	Brand All
Alloys & Accessories Amalgam Capsules	Period Sales				Growth (Prior Per.)	Growth (Last Year)
Alloys & Accessories Amalgam Pellets	\$21,695.49				64.75 %	52.27 %
Alloys & Accessories Amalgam Powders	\$12,527.38				-42.50 %	51.87 %
Alloys & Accessories Amalgam Waste Management	\$72,253.64				-11.89 %	17.06 %
Alloys & Accessories Amalgamators	\$311,258.39				8.65 %	-26.11 %

By selecting the small excel icon in the left corner, you are able to export each dashboard pod to either an excel format or a PDF.

19.

Current Dashboard Period: **September 2012**

View Parameters For Data Below

Test Dashboard

Category	Period Sales	Growth (Prior Per.)
Alloys & Accessories Amalgam Capsules	\$2,905,397.19	-14.8%
Alloys & Accessories Amalgam Pellets	\$21,695.49	64.7%
Alloys & Accessories Amalgam Powders	\$12,527.38	-42.5%

Add Data To This Snapshot

Add Data to this Snapshot

Table:

Category	Time Period	Most Recent Month	Territory	Total U.S.	Manufacturers All	Brand All
Alloys & Accessories Amalgam Capsules	Period Sales				Growth (Prior Per.)	Growth (Last Year)
Alloys & Accessories Amalgam Pellets	\$21,695.49				64.75 %	52.27 %
Alloys & Accessories Amalgam Powders	\$12,527.38				-42.50 %	51.87 %
Alloys & Accessories Amalgam Waste Management	\$72,253.64				-11.89 %	17.06 %
Alloys & Accessories Amalgamators	\$311,258.39				8.65 %	-26.11 %

The data within your dashboards will be updated automatically every time that we publish new data to the portal. The drop-down seen here will indicate which is the most recently published period. Using this drop-down you are also able to change the current dashboard period to view data from other periods.

20.

	A	B	C	D
1	Parameters			
2	Current Month	Sep-12		
3	Time Period	Most Recent Month		
4	Categories	Hand Instruments Hygiene Instruments Currettes/Scalers		
5	Territories	Total US		
6				
7				
8	Brand	Average Price	Growth (Prior Per.)	Growth (Last Year)
9	AMERICAN EAGLE	\$32.09	2.56%	4.63%
10	HU-FRIEDY	\$33.68	1.42%	2.03%
11	PDT	\$23.44	1.31%	-0.32%
12	PRIVATE LABEL	\$15.98	0.20%	4.12%
13				
14				

When exported to excel, your dashboard data will look similar to this.

