

# Getting Started

## Choose a Starting Point



Pick an analysis.

-or-



Select a starting bookmark.

**1**

## Select the Dates

Choose the date range for the situation in question.

Additional resources:

An extensive help section is available within SIM.

**6**

## Save & Share

Save as bookmark (private or shared/global). Export, email, or copy visuals to clipboard.

**5**

## Customize

Customize formatting and display options, highlight, sort, etc.

**4**

## Narrow Down to Find Root Cause



Double-click to drill down on an area of interest.

Other options include adding a filter, turning on a collection, and more.

**2**

## Choose the Context

Select how to group the data (1st By, 2nd By, etc.) or list out members.

**3**

## Insert Metrics



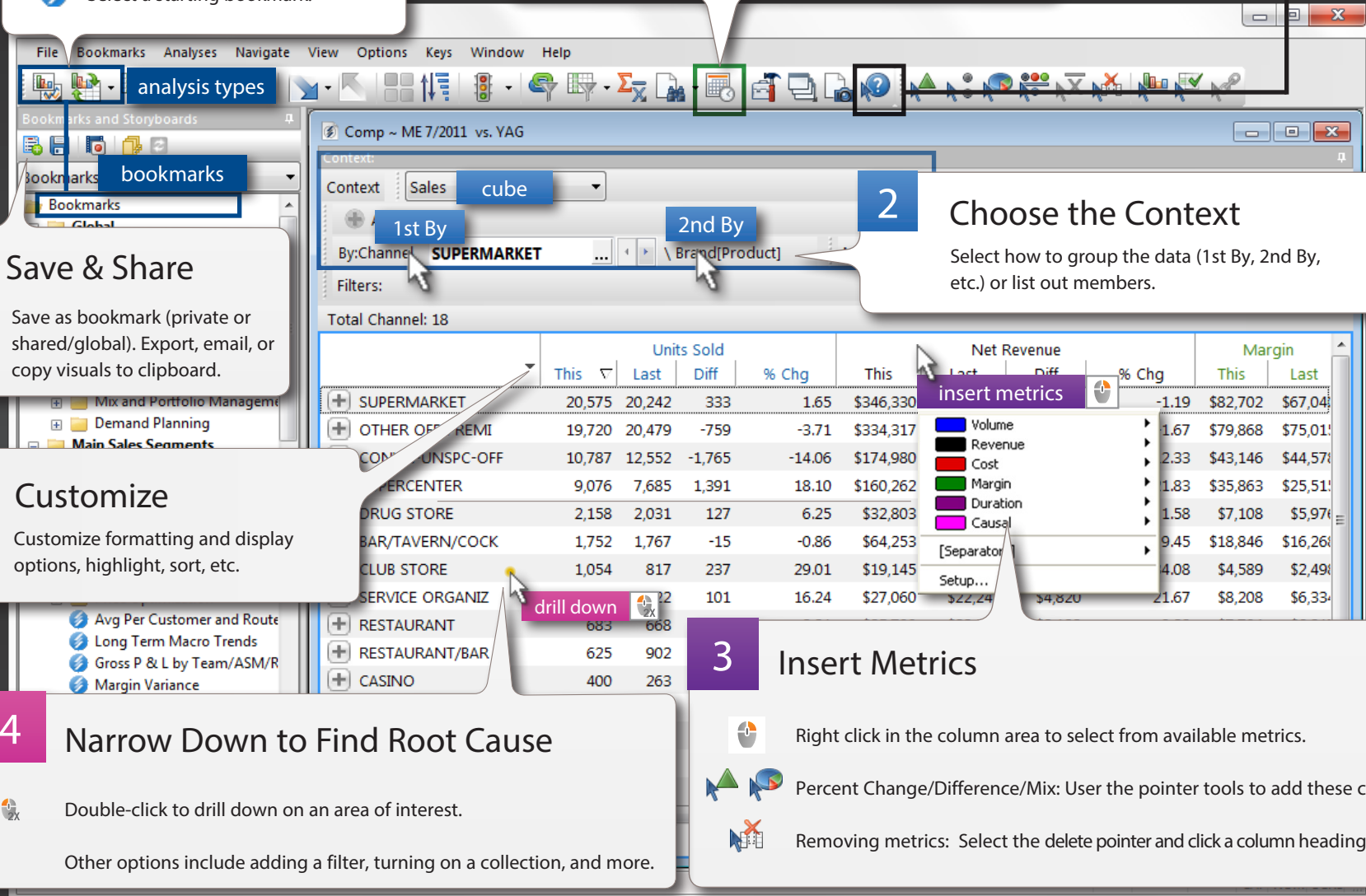
Right click in the column area to select from available metrics.



Percent Change/Difference/Mix: Use the pointer tools to add these columns.



Removing metrics: Select the delete pointer and click a column heading.



The screenshot displays the SIM software interface with several callouts and annotations:

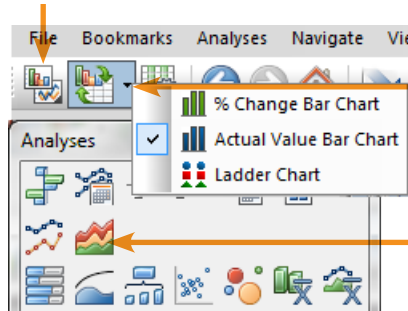
- Callout 1 (Green box):** Points to the 'Date Range' selector in the top toolbar.
- Callout 2 (Blue box):** Points to the 'Context' dropdown menu, which is set to 'Sales cube'.
- Callout 3 (Purple box):** Points to the '1st By' and '2nd By' dropdowns, which are set to 'Channel' and 'Brand[Product]' respectively.
- Callout 4 (Pink box):** Points to the 'drill down' icon in the bottom left corner.
- Callout 5 (Red box):** Points to the 'Customize' button in the bottom left corner.
- Callout 6 (Orange box):** Points to the 'Save & Share' button in the bottom left corner.
- Callout 7 (White box):** Points to the 'insert metrics' button in the bottom right corner.

The main data table shows the following columns: This, Last, Diff, % Chg, This, Last, Diff, % Chg, This, Last, Diff, % Chg. The rows represent different categories, including SUPERMARKET, OTHER OFF REMI, COM UNSPC-OFF, PERCENTER, DRUG STORE, BAR/TAVERN/COCK, CLUB STORE, SERVICE ORGANIZ, RESTAURANT, RESTAURANT/BAR, and CASINO.

Select a Starting Point:

## Analysis Types

Select a mode of analysis based on what you want to find out (e.g., compare, identify trends, find outliers, etc.)









Change between graph or numbers. Click the arrow to select a graph format.



Tip: Left-click to go directly to the analysis; right-click to open the setup dialog.

### Analysis types




#### Date comparisons

-  Compare members for two date ranges
-  Compare over two date ranges
-  MTD and YTD comparison
-  1 week, 4 weeks, 13 weeks and year vs YAG
-  Any number of date comparisons
-  Compare by two attributes








#### Trends over time

-  Trend over time
-  Share trend over time for multiple members





#### Mix or share

-  Mix (percent of total) for two date ranges
-  Mix (percent of total)
-  Mix (percent of total) over time

#### Exceptions and outliers

-  Exception (pass/fail) test
-  Exception (pass/fail) over time
-  Distribution over ranges
-  Scatter by two metrics (key level)
-  Plot by two metrics (attribute level)
-  Average per passing member
-  Average per member over time

#### Other

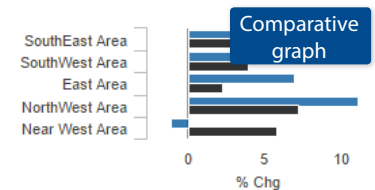
-  P&L format/scorecard
-  Geo location intelligence
-  Line item details
-  Non-transactional details

### Examples:

**Comparative numbers**

	Units Sold	% Chg	Net Revenue	% Chg
	This	% Chg	This	% Chg
SouthEast Area	69,324	7.12	\$622,179	5.16
SouthWest Area	65,067	6.87	\$553,981	3.97
East Area	58,896	6.98	\$464,027	2.26
NorthWest Area	56,410	11.16	\$501,003	7.32
Near West Area	20,919	-1.08	\$216,440	5.84

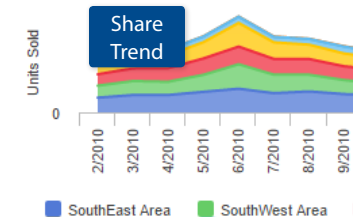
Compare performance by any attribute between two date ranges.



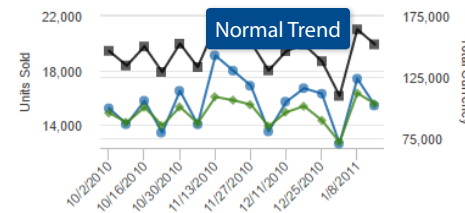
See what increased or decreased and how much.



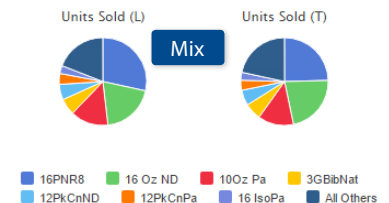
Trend performance over two date ranges.



Compare performance over time by any attribute.



Trend any number of performance metrics over time.



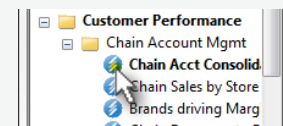
Compare percent of the total.

**Exception**

	Totals	Passed	% Passed	Failed	% Failed
All Others	5,498	901	16.4	4,597	83.6
College Full Service	173	71	41.0	102	59.0
DJ Inc.	94	33	35.1	61	64.9
Overring Inc.	37	22	59.5	15	40.5
Lakeside Garage	36	22	61.1	14	38.9
D & C Group	33	19	57.6	14	42.4

See how many passed or failed a test (e.g., sales greater than or equal to 1).

Tip: You may want to use a bookmark as a starting point rather than creating an analysis from scratch.



## 1 Select the Dates

Click the Period button.



Access timeframe options in the dialog.

Set the resolution (days, weeks, etc.)

Filter on certain days (if applicable)

Choose the timeframe ("This" date range)

Select previous period to compare against ("Last" date range).

Options may be disabled based on the current mode of analysis. Change the analysis mode to enable relevant settings if desired.

### Incomplete month options

Select an option for incomplete months:

On View menu, select Modifiers. In MTD/YTD Calculation Method section, select an option:

Tip: If these options are greyed out, make sure you have the current month selected on the timeline.

**MTD/YTD Calculation Method**

- ☐ Full Month: Incomplete month vs. complete month last year—"gap" or "goal" perspective.
- ☒ Calendar Days: Compares same number of days this year and last—most precise "gain/loss" vs last.
- ☐ Weighted Days: Must be set up by your system administrator.

## 2 Choose the Context

1<sup>st</sup> By: data cube

Next By (2<sup>nd</sup> By \ 3<sup>rd</sup> By \ 4<sup>th</sup> By \ 5<sup>th</sup> By)

Context: Sales

By: Region NorthWest Area

Modifiers: Calendar Days

Filters: Sales Rep \ Key Account \ Prod Name

	This	Last	Diff	% Chg	Mix (T)	This	Diff
SouthEast Area	45,246	66,844	-21,598	-32.31	26.8	\$9.68	\$4.4
SouthWest Area	40,085	56,164	-16,079	-28.63	23.8	\$9.36	\$4.4
East Area	36,941	50,624	-13,683	-27.03	21.9	\$8.63	\$2.2
NorthWest Area	32,800	52,182	-19,382	-37.14	19.4	\$9.98	\$1.0
Johnson, Louise	14,302	22,262	-7,960	-35.76	43.6	\$9.65	\$7.7
Markey, Ciro	12,279	17,140	-4,861	-28.36	37.4	\$10.20	\$8.8
Allen, Chris	3,354	9,540	-6,186	-64.84	10.2	\$8.79	\$1.5
Village North	1,762	6,188	-4,426	-71.53	52.5	\$8.16	\$1.5

To change the groupings/subgroupings and list out members

By: Region SouthEast Area

Set 1<sup>st</sup> By

Set Next By

Customer

Product

Driver

ActualSalesRep

Asset

CustBrandPack

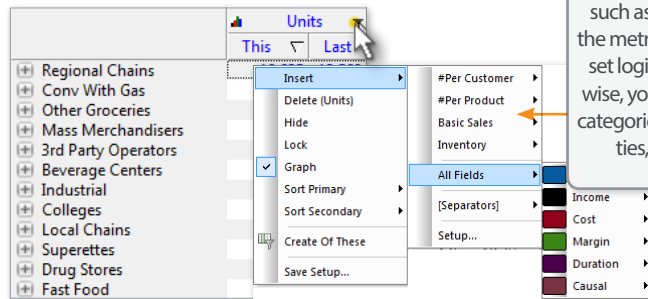
List Product for SouthEast Area

List out customers, products, etc.

Tip: If you don't see the key or dimension, you may need to change the data cube.

### 3 Insert Metrics




In numbers views:



Tip: Select a metric grouping such as Basic Sales and then the metric if your company has set logical groupings. Otherwise, you can select from data categories that include Quantities, Income, Cost, etc.

Variance, mix and other computations:

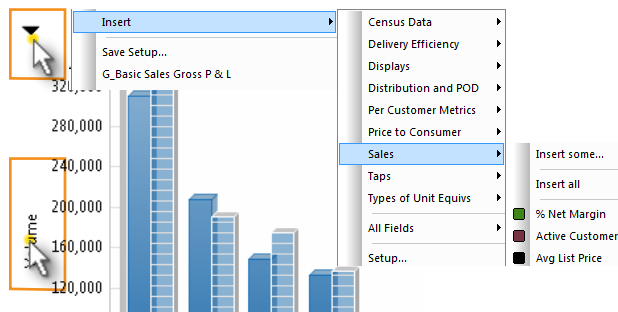
Click on a pointer tool and then click on the column.

-  **Delta**—shows changes difference and % Change.
-  **Average**—shows average value per period.
-  **Mix**—shows mix % versus the total.

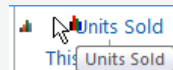
Units Sold	Last
310,631	323,609
208,037	190,686
147,991	175,411
133,267	137,369

In graphs:

Open the tools menu or click the label to access options for selecting the data.



Tip: Sometimes columns must be marked using the graph pointer to show them in the graph.



### 4 Narrow Down

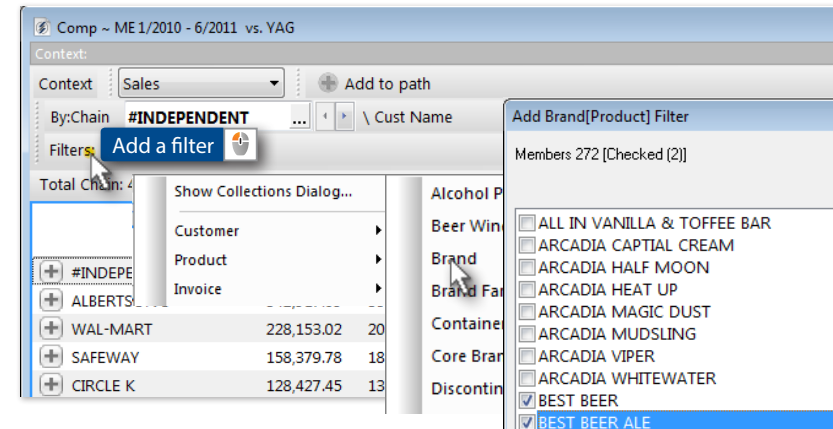
Drill down:

By: Channel Regional Chains

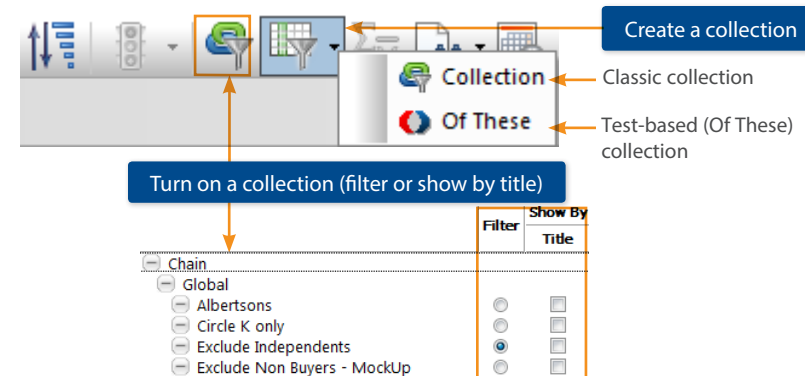
Double-click on a member

	This	Last	Diff	% Chg
Regional Chains	12,635	13,569	-934	-6.88
Conv With Gas	6,432	7,436	-1,004	-13.50
Other Groceries	4,500	4,575	-75	-1.64
Mass Merchandisers	3,808	2,452	1,356	55.30

Add filter:



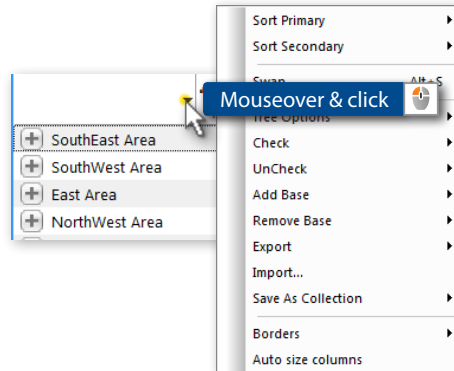
Collections:



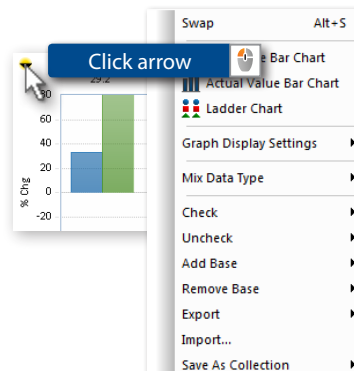
## 6 Customize

### Tools menu

To access in numbers views:



To access in graphs:



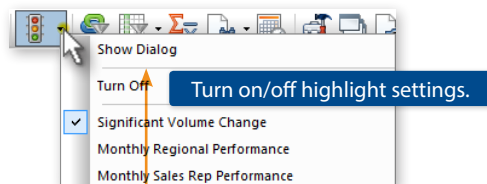
### Sort

	This	Last	Diff	% Chg
12Pk Cn	79,432	59,433	19,739	33.21
16PNR8				6.95
6Pk Cn				6.72
16 Oz ND				6.46
100z Pa				6.10

Click column heading

Click again to reverse sort

### Highlight

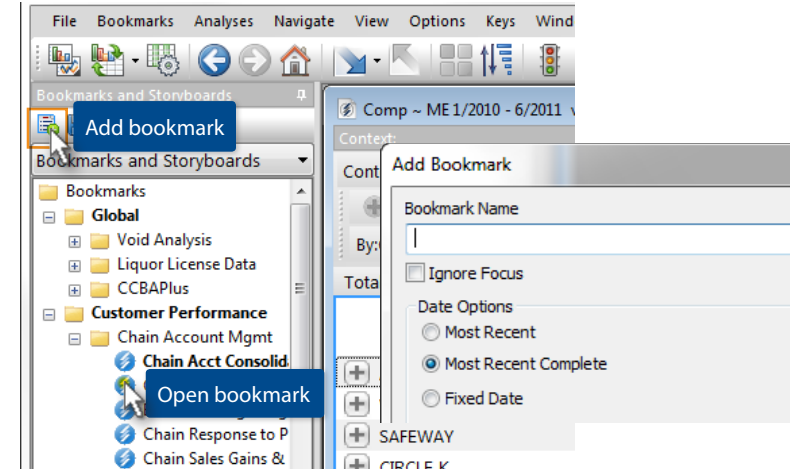


Tip: Select "Show Dialog" to configure and save highlight settings.

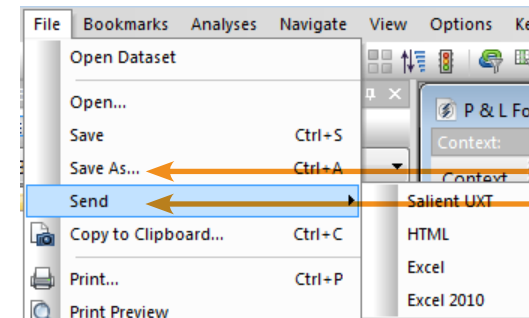
## 6 Save and Share

### Bookmarks

Configure a view and then add it as a bookmark to re-use it and/or share it with other users.



### Export and Email



Several different formats are available depending on whether you are exporting a numbers view or graph. Options may be restricted by user ID.

Tip: You can set up macros to automatically export and email data. Select Options > Macros on the menu.