

# Getting Started

## Choose a Starting Point

Select a starting bookmark.  
-or-  
Pick an analysis.

## Additional resources:

An extensive help section is available within SIM.

## 6 Save & Share

Save bookmarks, run macros, export, etc.

## 1 Select the Dates

Choose the date range for the situation in question.

## 2 Group By and List

Select attributes for grouping the data (1st By, 2nd By, etc.) or list out members.

## 3 Insert Data Fields

Right click in the column area to select from available data fields.

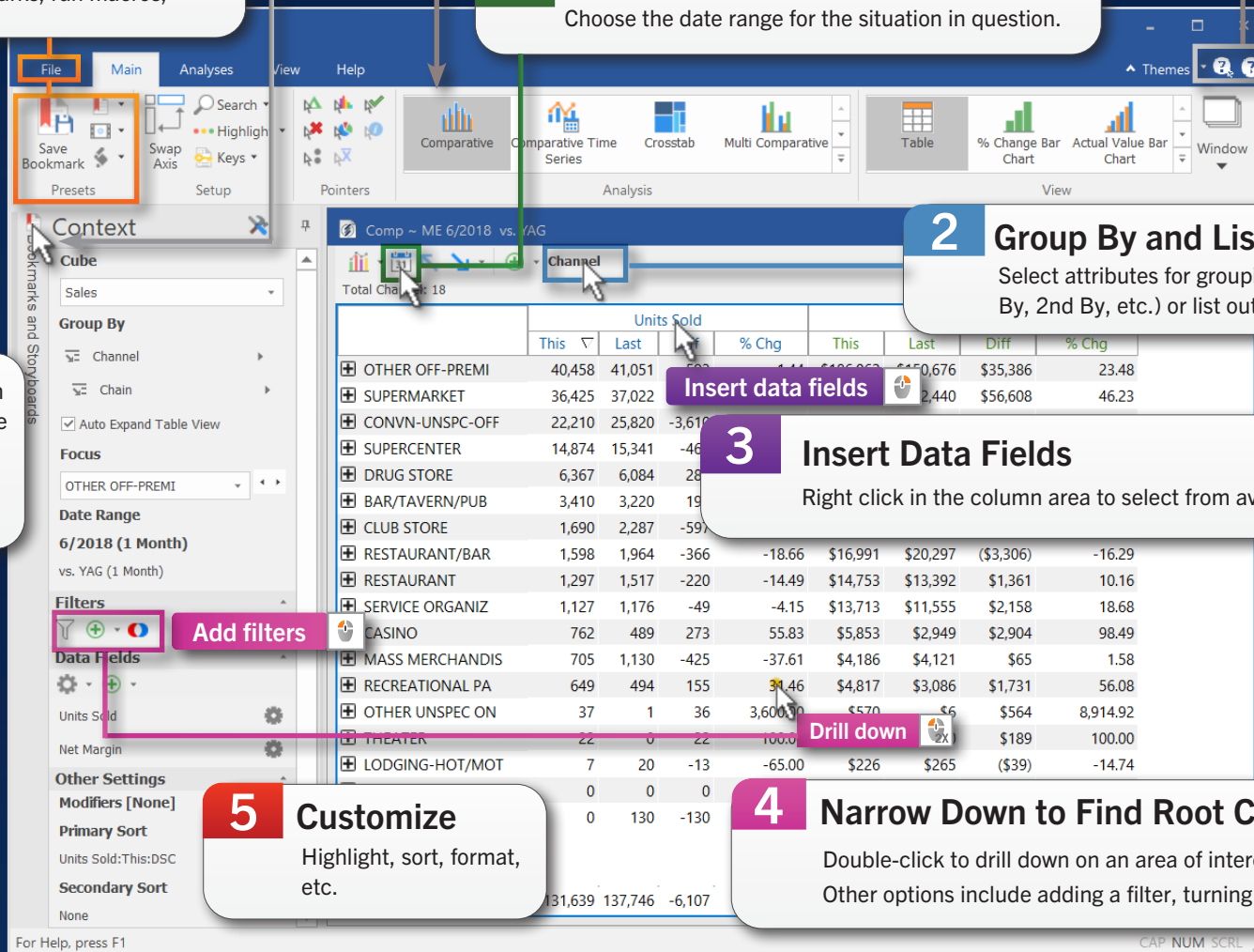
## 4 Narrow Down to Find Root Cause

Double-click to drill down on an area of interest.  
Other options include adding a filter, turning on a collection, etc.

## 5 Customize

Highlight, sort, format, etc.

Tip: Most tasks can be performed in the context panel on the left side of the screen.



The screenshot shows the SIM interface with the following elements:

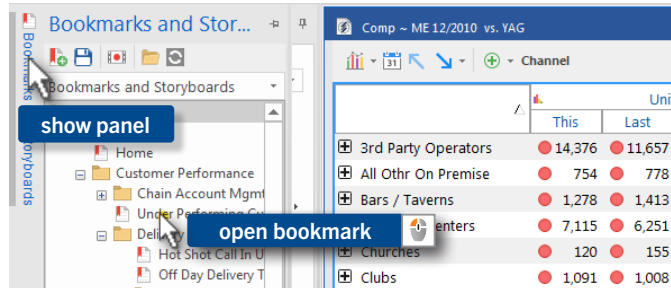
- File Menu:** Contains 'Save Bookmark' and 'Presets' options.
- Main Menu:** Includes 'Analyses', 'View', and 'Help'.
- Analysis Tab:** Shows 'Comparative' and 'Comparative Time Series' options.
- View Tab:** Includes 'Table', '% Change Bar Chart', and 'Actual Value Bar Chart'.
- Context Panel (Left):**
  - Cube:** 'Sales'.
  - Group By:** 'Channel' and 'Chain'.
  - Focus:** 'OTHER OFF-PREMI'.
  - Date Range:** '6/2018 (1 Month)' vs. 'YAG (1 Month)'.
  - Filters:** Includes a filter icon and a plus sign.
  - Data Fields:** Includes 'Units Sold' and 'Net Margin'.
  - Other Settings:** Includes 'Modifiers [None]', 'Primary Sort' (Units Sold:This:DSC), and 'Secondary Sort' (None).
- Main Data Table:**

	This	Last	% Chg	This	Last	Diff	% Chg
OTHER OFF-PREMI	40,458	41,051	-1.48	\$16,991	\$20,297	(\$3,306)	-16.29
SUPERMARKET	36,425	37,022	-1.62	\$14,753	\$13,392	\$1,361	10.16
CONVN-UNSPC-OFF	22,210	25,820	-13.59	\$13,713	\$11,555	\$2,158	18.68
SUPERCENTER	14,874	15,341	-3.04	\$5,853	\$2,949	\$2,904	98.49
DRUG STORE	6,367	6,084	4.64	\$4,817	\$3,086	\$1,731	56.08
BAR/TAVERN/PUB	3,410	3,220	5.90	\$4,186	\$4,121	\$65	1.58
CLUB STORE	1,690	2,287	-26.14	\$226	\$265	(\$39)	-14.74
RESTAURANT/BAR	1,598	1,964	-18.66	\$16,991	\$20,297	(\$3,306)	-16.29
RESTAURANT	1,297	1,517	-14.49	\$14,753	\$13,392	\$1,361	10.16
SERVICE ORGANIZ	1,127	1,176	-4.15	\$13,713	\$11,555	\$2,158	18.68
CASINO	762	489	55.83	\$5,853	\$2,949	\$2,904	98.49
MASS MERCHANDIS	705	1,130	-37.61	\$4,186	\$4,121	\$65	1.58
RECREATIONAL PA	649	494	31.46	\$4,817	\$3,086	\$1,731	56.08
OTHER UNSPEC ON	37	1	3,600.00	\$570	\$6	\$564	8,914.92
THEATER	22	0	100.00	\$189	\$189	\$0	0.00
LODGING-HOT/MOT	7	20	-65.00	\$226	\$265	(\$39)	-14.74
TOTAL	131,639	137,746	-6.107				

## Choose a Starting Point

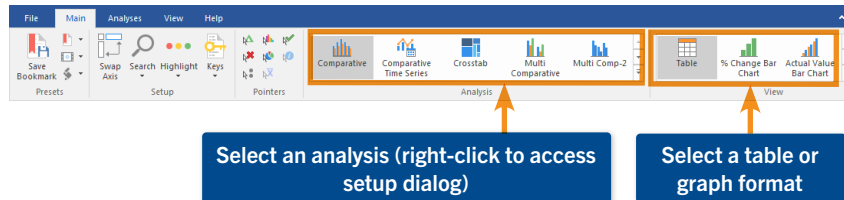
### Option 1: Start from a bookmark

To access the bookmarks panel, mouse over the tab (if it's in autohide mode). Then, click on a bookmark to open it.









### Option 2: Choose an analysis

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










### Analysis types

#### Date comparisons



-  Compare members (1 or 2 date ranges)
-  Compare over 2 date ranges
-  MTD and YTD comparison
-  1 week, 4 weeks, 13 weeks & year vs YAG
-  Any number of date comparisons
-  Compare by 2 attributes

#### Exceptions and outliers




-  Exception (pass/fail) test
-  Exception (pass/fail) over time
-  Distribution over ranges
-  Scatter by 2 data fields (key level)
-  Plot by 2 data fields (attribute level)
-  Average per passing member
-  Average per member over time

### Analysis types (continued)





#### Trends over time

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

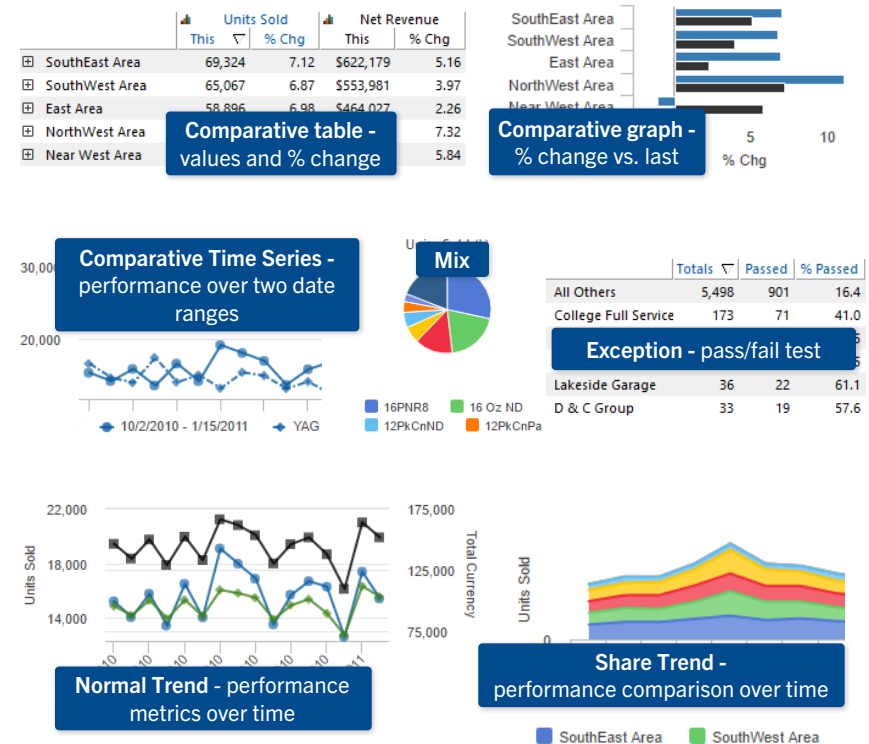
#### Mix or share

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

#### Other

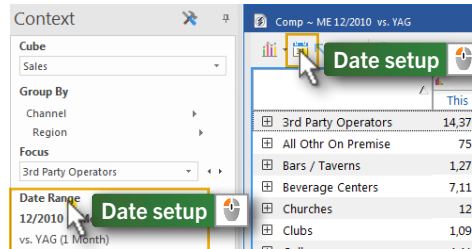
-  P&L format/scorecard
-  Geo location intelligence
-  Line item details
-  Non-transactional details

### Examples



## 1 Select the Dates

Click the Period button in the analysis toolbar or Date Range in the context panel.



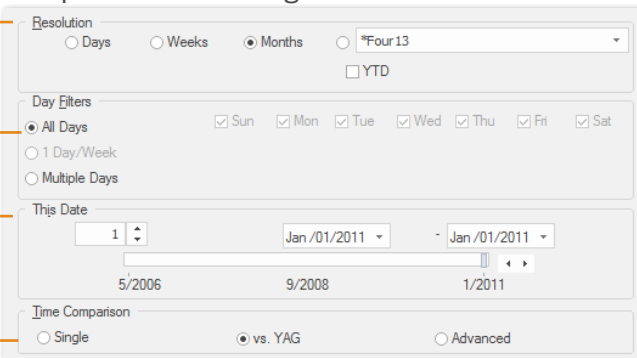
Choose timeframe options in the dialog.

Set the resolution (days, weeks, etc.)

Filter on certain days (optional)

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.

### Incomplete month options

#### Other Settings

Modifiers [None]

Primary Sort

Units: This.DSC

In the context panel, click on Modifiers; then select an MTD/YTD calculation method (only available if the date range is set to the current month).

#### MTD/YTD Calculation Method

☐ Full Month

☐ Calendar Days

☐ Weighted Days

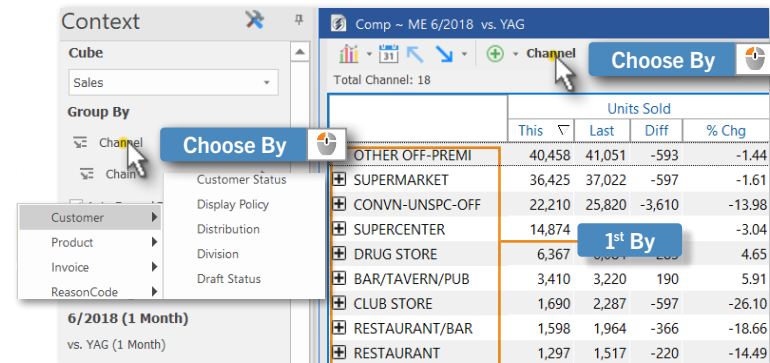
Incomplete month vs. complete month last year—"gap" or "goal" perspective.

Compares same number of days this year and last—most precise "gain/loss" vs last.

Must be set up by your system administrator.

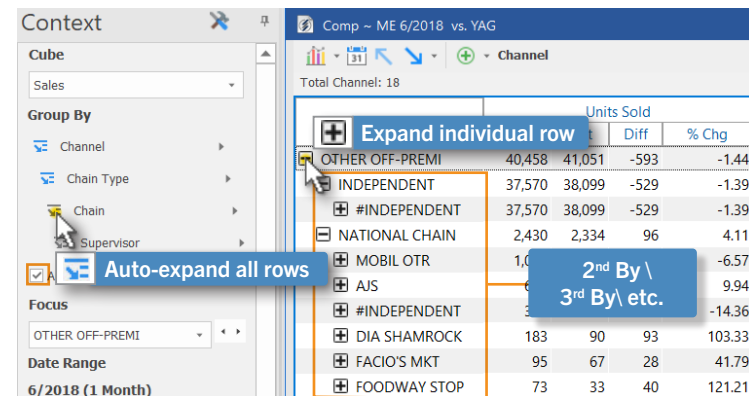
## 2 Group By and List

The "Group By" controls how data is organized into categories for comparison. The top-level of groupings is called the 1st By.



**Tip:** To list out key members (e.g., customers), choose a "list" as the 1st By.

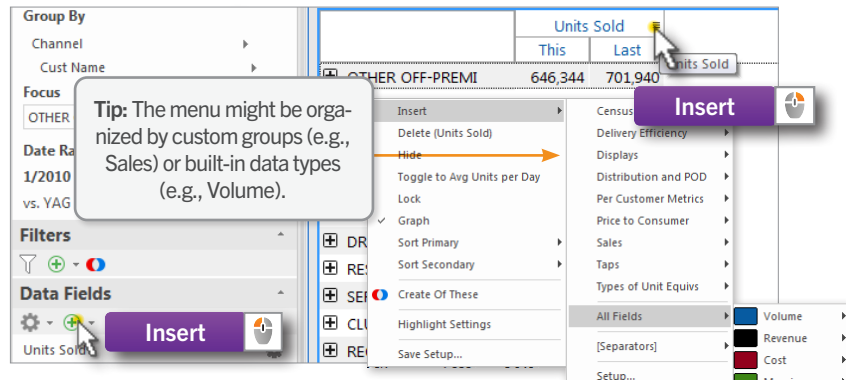
You can expand data into additional levels (2nd By, 3rd By, etc.) to see more details. You can expand rows individually or auto-expand all rows of a dimension.



### 3 Insert Data Fields

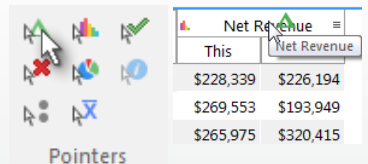
#### In tables:

Insert data fields by clicking in the Context panel or right-clicking a column heading.



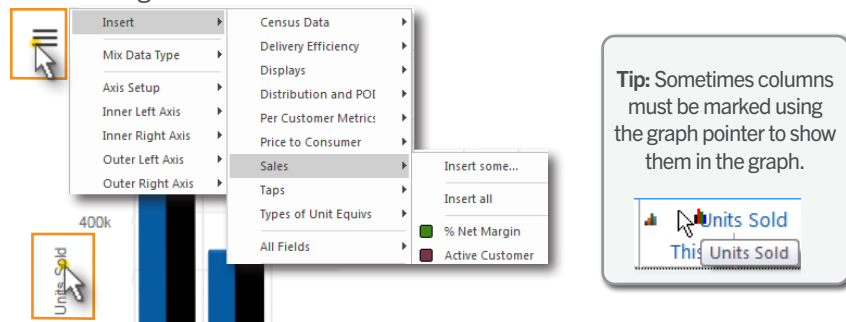
#### Variance, mix and other computations:

Click on a pointer tool in the ribbon control and then click on the column.



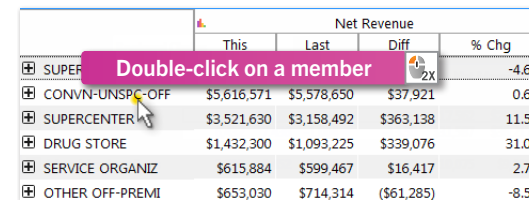
#### In graphs:

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



### 4 Narrow Down

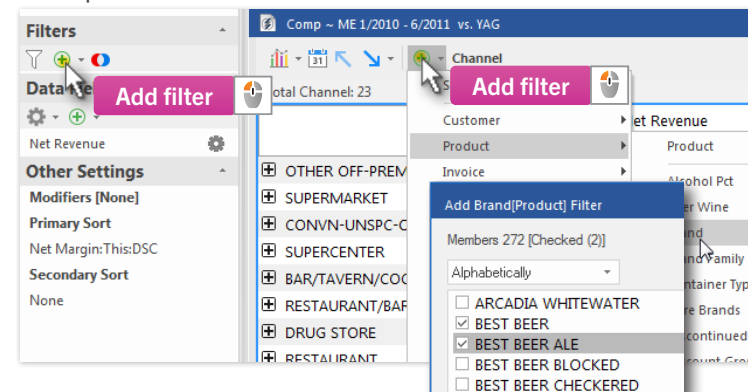
#### Drill down:



	This	Last	Diff	% Chg
SUPER				-4.67
CONVN-UNSPC-OFF	\$5,616,571	\$5,578,650	\$37,921	0.68
SUPERCENTER	\$3,521,630	\$3,158,492	\$363,138	11.50
DRUG STORE	\$1,432,300	\$1,093,225	\$339,076	31.02
SERVICE ORGANIZ	\$615,884	\$599,467	\$16,417	2.74
OTHER OFF-PREMI	\$653,030	\$714,314	(\$61,285)	-8.58

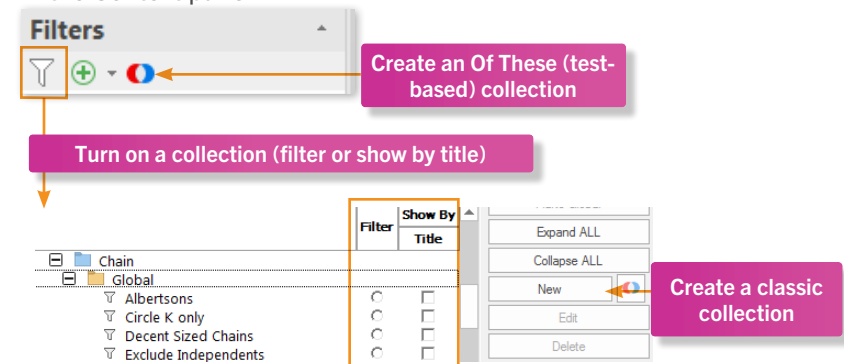
#### Add filter:

Click the "Add Filter" button in the Context panel or analysis toolbar. Then pick what to show.



#### Collections (saved sets of members):

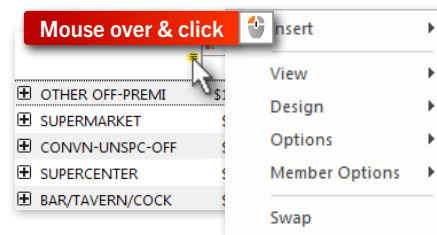
In the Context panel:



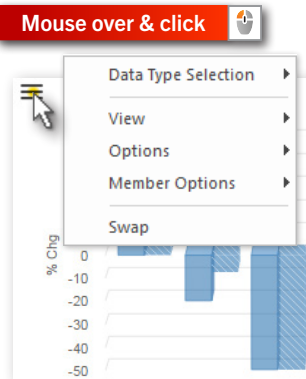
## 5 Customize

### Tools menu

To access in tables:



To access in graphs:



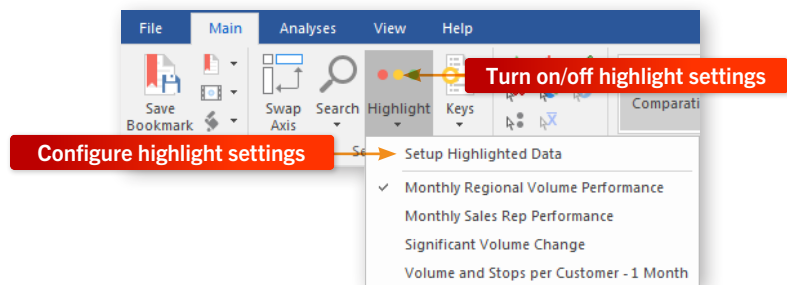
### Sort

	Units Sold			
	This	Last	Diff	% Chg
OTHER OFF-PREMI	41,114	39,832	1,289	3.24
SUPERMARKET	23,088	26,272	-3,184	-12.12
CONVN-UNSPC-OFF	23,088	26,272	-3,184	-12.12
SUPERCENTER	6,737	6,521	216	3.31
DRUG STORE	6,737	6,521	216	3.31

Click column heading

Click again to reverse sort

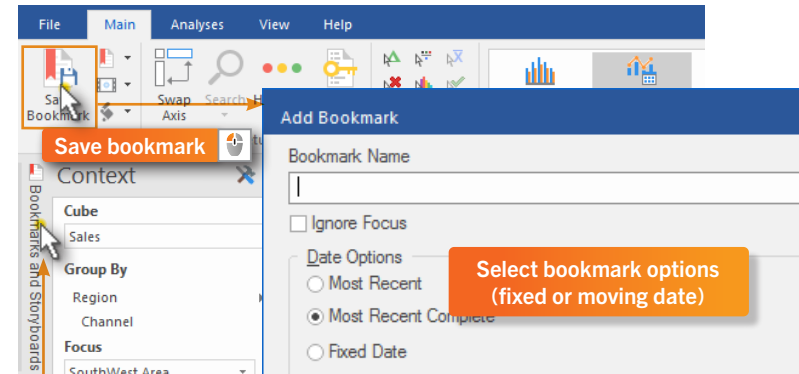
### Highlight



## 6 Save and Share

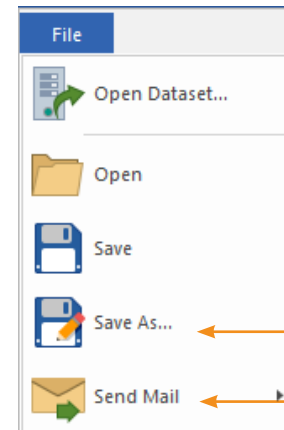
### Bookmarks

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



Tip: Mouse over the tab to access the bookmarks panel.

### Export and Email



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

Tip: You can set up macros to automatically export and email data.

