

REPORTING & THE DATA CUBE





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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for Go Reporting and the Data Cube.

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INTRODUCTION

Based on the Green 4 concept that..."We give you the tools and provide a framework for you to develop your business", the overall BI offering, including the Advanced Find function, Reports, Dashboard information, the Data Cube etc. have been further enhanced to provide the ability to 'drill down' to the raw data captured by the Go systems.

REPORTING & THE DATA CUBE



REPORTING & THE DATA CUBE

1. ADVANCED FIND

2. REPORTING

3. DATA CUBE

Advanced find is a tool in Microsoft Dynamics that allows users to look up data, based upon criteria important to them, which can subsequently be used for reporting purposes.

The tool allows searches on multiple fields in the primary record type, as well as multiple fields within a related record. Go modules offer a number of Reports which allow organisations to view and manage the data collected in CRM. Many Reports use filters which can be set so that specific data can be chosen to be displayed in the Reports. Report data can be further analysed so that feedback and future marketing campaigns can target specific areas. The Data Cube uses Excel to extract data from CRM so that it can be analysed and used even further. This is especially relevant to sales data such as particular Fixtures, Series or other types of products.

The Data Cube enables users to drill down and dig deep into the data. For example to find out the payments received per Channel on a particular date. The Data Cube is a tool which allows organisations to make even further use of the data that is collected from within CRM



1. ADVANCED FIND

Advanced find is a tool in Microsoft Dynamics that allows users to look up data based criteria important to them which can subsequently be used for reporting purposes. The tool allows you to search on multiple fields in the primary record type, as well as multiple fields within a related record.

If for example a user wanted to search for a Contact that had the last name 'Smith', they would look for Contacts that had the last name 'Smith' and the query would look like this:

FILE	ADVAN	ICED FINE	>				Microsoft Dyn	amics CRM	System Administrator 🕜 go ය
Query	Saved Views Show	Results	New	Save	Gave As Edit Columns Edit Properties	Clear	[{≣ Group AND [{≣ Group OR ⊡ Details Query	Download Fetch XML Debug	
Look fo	or: Conta	acts				~	Use Saved View:	[new]	
	Last Name <u>Select</u>	2		<u>Equals</u>	i	Smith			

This query would return all contacts that had the last name 'Smith'.

By adding a **related** field, the user can search the content of a related record form. For example, if a user wanted to find out if any of the contacts were associated with an account where the City field on the account was 'Lutterworth', a related field would need to be added to the query:

								Microsoft Dyna	amics CRM	System Administrator 💡
FIL	E	ADVAN	ICED FINE	D						go a
Que		Saved Views	Results	New	Save	Edit Columns	Clear	[문 Group AND [문 Group OR 금 Details	Download Feto XML	tch
		Show			1	View		Query	Debug	
Loc	ok fo	or: Cont	acts				\checkmark	Use Saved View:	[new]	V
	v <u>i</u>	Last Nam	2		Equals	2	<u>Smit</u>	h		
		<u>Select</u>								
	۷.	Parent Cu	stomer (A	Account)						
		✓ Addre	ess 1: City	1	<u>Ec</u>	quals	L	utterworth		
		<u>Selec</u>	t							

By doing this, the Advanced Find will return all the contacts with last name 'Smith' and by adding the related field – the Advanced Find will then search on the Account form to return the contacts associated with an account that has a City of 'Lutterworth'. This is possible when the relationship between the two contacts already exists.



1.1. RUNNING AN ADVANCED FIND

To run an Advanced Find in Microsoft CRM:

- a) Go to the entity you want to search on (In this example we will search for contacts, therefore select **Contacts** from the **Navigation Bar**).
- b) Select the **Advanced Find** button on the ribbon. This is found by clicking on the more commands symbol as demonstrated below.



c) The Advanced Find form will be displayed. Select the Details menu option.

FILE	ADVANCED FIND			Microsoft Dyna	mics CRM	System Administrator 🕜 go 💩
Query	Saved Views Show	New Sav	Edit Columns	(E Group AND (E Group OR Clear Query	Download Fetch XML Debug	
Look fo	or: Contacts			✓ Use Saved View:	Active Contacts	V
	<u>Status</u>	Equ	ials	Active		
	<u>Select</u>					

d) Next, in the **Look For** drop down menu choose what the Advanced Find is to search for before choosing in the **Use Saved View** drop down an appropriate view. In this example as we are searching for contacts select Look For - Contacts and Use Saved View - Active Contacts.

FILE	ADVAN	CED FIND					Microsoft Dyn	amics CRM	System Administrator 🕝 go 💩
Query	Saved Views Show	Results	New	Save	Edit Properties	Q Clea	(t≣ Group AND t≣ Group OR ar Query	Download Fetch XML Debug	
Look fo	or: Conta	cts				~	Use Saved View:	Active Contacts	
Statu	us Equals	<u>Active</u>					•		

e) The Advanced Find dialog will be updated as shown below. The search parameters to the view will automatically be added but may differ depending on what you are searching for. In this instance one parameter is automatically listed: **Status Equals Active**. This means that if the Results button was selected now, all active contacts would be searched for and found.



								Microsoft Dyn	amics CRM	System Administrator 💡
F	ILE	ADVA		>						ی میں system Administrator
Q	uery	Saved Views	Results	New	Save	Edit Columns	2 Clear	(佳 Group AND (佳 Group OR 글 Details	Download Fetch XML	
		Show			١	/iew		Query	Debug	
Ŀ	ook fo	r: Cont	tacts				v (Use Saved View:	Active Contacts	Y
[× 9	<u>Status</u>			<u>Equals</u>	<u>i</u>	<u>Active</u>	<u>1</u>		
	1	Select								

f) To add additional parameters and to narrow the search click Select (highlighted in the below image)

						Microsoft Dyn	amics CRM	System Administrator 🕜
FILE	ADVANCED FI	ND						go 😞
Query	Saved Result Views	s New	Save	Edit Columns	2 Clear	[{≣ Group AND [{≣ Group OR ☐ Details Query	Download Fetch XML Debug	
	or: Contacts		Equals	5	Active	Use Saved View:	Active Contacts	
	Select			-		-		

- g) A list of fields you can search for will be displayed. The list is divided into two sections:
 - Fields. The top section of the list shows the fields that are part of the record type you are currently searching on. In this example we can see all the fields that form part of a contacts record.
 - **Related.** The bottom section of the list shows all of the entities that are related to the current record type. So in this example we see a list of all record types that are related to a contact.

To use a **Field name** from the list:

h) Select the appropriate field name from the list. A new row will be added to the Advanced Find as is shown below. In this example I have chosen birthday. In the middle drop down I am able to select exactly what the Advanced Find should search for in relation to the birthday. Various options can be chosen and depending on what field has been chosen, different options to search for will be displayed.

FILE	ADVANCED FIND)				Microsoft Dyna	mics CRM	System Administrator 😵 go 🗞	
· · · v	aved Results	New	Save	Save As Edit Columns Edit Properties	Cle	🔁 Details	Download Fetch XML		
S	how			/iew		Query	Debug		
Look for:	Contacts				\checkmark	Use Saved View:	Active Contacts		\checkmark
∀ <u>Sta</u>	atus		Equals		_	tive			
✓ Birt	thday	\sim	On		✓ Ch	oose Date			
Sel	lect								

i) Any additional fields can be searched for by choosing **Select**. The above process can then be repeated to narrow down your Advanced Find.



- j) When all of your search criteria has been selected, click **Results** in the ribbon. A list of records meeting the conditions entered will be displayed.
- k) To return to the search terms, select the **Advanced Find** tab heading (highlighted below). The search item previously entered will be redisplayed allowing you to modify the details.



To use a **Related field** from the list.

 Select the appropriate record type from the related section of the list. A new row will be added to the Advanced Find as shown below. This row will be coloured blue to indicate that it is a related record type. In this example, the related field of **Payment Mandate** has been chosen.

							Microsoft Dyna	amics CRM	System Administrator 🕜
FILE	ADVAN	ICED FINI	D						go 🛆
Query	Saved Views	Results	New	Save	Edit Properties	2 Clear	[문 Group AND [문 Group OR 글 Details Query	Download Fetch XML Debug	
Look f	or: Conta					∨ ι	Use Saved View:	-	
LOOK	or: Conta	ICIS				•	use saved view:	Active Contacts	
~	<u>Status</u>			Equals	i i i i i i i i i i i i i i i i i i i	<u>Active</u>	1		
~	Birthday			<u>On or</u>	After	09/03	/1900		
	Select								
~	Payment I	Mandate:	s (Contact))					
						~			

- m) To set a search term based on the related entity, click **Select** below the blue related row. A list of fields will be displayed and as before the list will be divided into two sections.
 - Fields. The fields section will list all of the fields from the related record
 - **Related.** The related section will list all of the record types that are related to the current record type.
- n) Select the appropriate field or related item from the list. A new row will be added to the Advanced Find dialog. Complete the details of the new row as required, this will differ depending on what has been selected. As shown in the image below, Bank Name has been chosen from the list of Fields in this example.



								Microsoft Dyn	amics CRM	System Administrator 😮
FIL	.E	ADVA	NCED FIN	D						go a
Qu	-	Saved Views	Results	New	Save	Edit Columns	2 Clear	[는 Group AND [는 Group OR 글 Details	Download Fetch XML	1
		Show			1	View		Query	Debug	
Loo	ok f	or: Con	tacts				~	Use Saved View:	Active Contacts	V
	¥	<u>Status</u>			Equals	5	Active	2		
	Y	<u>Birthday</u>			<u>On or</u>	After	<u>09/03</u>	/1900		
		Select								
	۲.	<u>Payment</u>	Mandate	s (Contact)					
		∨ <u>Bank</u>	Name		Ec	quals	Sa	ntander		
		<u>Selec</u>	<u>t</u>							

- o) To view the results of your search, click **Results** on the ribbon. A list of records meeting the criteria will be displayed. Therefore in this example, the results will show all contacts with a birthday on or after 09/03/1900 and have a Payment Mandate created with a Bank Name of Santander.
- p) It is possible to export the contacts that have been gained from your Advanced Find results by exporting them to Excel via the **Export to Excel** button on the ribbon.

_		LIST TOOLS	Microsoft Dynamic	CRM	Syste	m Administrator 🔞
FILE	ADVANCED FIND	CONTACTS			1.70200	۵ og
New Contact	✓ ⁺ Edit	Send Direct Add Email	Aiil Merge 🗼 Unfo Aii Connect - Quick mpaign - 🏠 Follow	llow Share	Run Workflow	Run Report - Contacts
	Records		Collaborate		Process	Data

1.2. EXAMPLES OF ADVANCED FIND SEARCHES

There are many different ways that Advanced Finds can be used to find important data related to your needs. A number of Advanced Finds that are commonly used are highlighted below:



Note. The examples shown below are all dependant on the setup of the system and how this has been completed, therefore they may differ between setups.

• All Active Season Ticket Holders. This advanced find enables you to find all contact information related to every Active Season Ticket Holder on your system.

File	Advanced Find				
Quer	Saved Views Show	New Save As View Save As Columns Edit Columns Edit Propertie View	Clear	Download Fetch XML Debug	
Look	for: Seat Allocatio	ons	~	Use Saved View: [new]	
-	Series	Equals	2014/15 SEASON		
	Select				
-	<u>Booking</u>				
		us <u>Equals</u>	Active;Reserved		
	Select				



The Number of Season Ticket Holders in each block.

	-	CAP	100	eloged.	Daniely .			
Look	for:	Seat Allocations				~	Use Saved View:	Number of season ticket holders in each block
	Sele	±1						
•	Serie	6						
	•	Series	Equals	League 2013-2014				
		Select						
•	500	king						
	•	Booking Status	Equals	Active Reserved				
		Select						
	-	Booking Products (Booking)						
		Select						
		 Product Variant 						
		Select						
		 Bookable Product 						
		 True 	Equals	Series				
		Select						

• Number of seat moves into a particular block for a certain fixture.

ook	10	n Se	ert Alliscations			¥	Use Saved View: Trumber of seat moves into Black X for Foture X
•	9	hain	al Seat Allocation	Containo Data			
-	Ē	idun	1	Equals	Bristol City v Crewe Alexan		
	1	lock		Equals	WEDLOCK STINUD WEDLOC.		
	3	ielect					
•	1	lookir					
	•	- 50	oking Satus	Counts.	Active		
		Se	Liai				
	•	- 34	aking Products (Sop	kina)			
			Select				
			Product Variant				
			Select				
			• Bookable Produ	at .			
			 Jos 	Caue	a <u>Pieturs</u>		
			Seint				

1.3. SAVING AND SHARING AN ADVANCED FIND

When you have created an Advanced Find you can save the criteria for future use. For example if you create an Advanced Find to identify bookings for a particular fixture, you can save the search details, and then when you need to report on the next fixture, you can re-use the search once you have adjusted the fixture name.

To save and share an Advance Find view complete the following:

a) On the Advanced Find tab with the search terms visible, select Save As from the ribbon.

HLE .	ADVANCED FIND	1				Hicrosoft Dyna		System Administrator 😨
11 3.07	Saved Results	New	Savet	Edit Properties	Q Oear	()E Group AND ()E Group OR S-Details	Download Petan XML	
	Show .			Edit Properties		-Details Guery	XML Detrog	

b) Choose an appropriate name and click **Save**. The view will be saved and can be accessed from the dropdown below the ribbon on the Advanced Find dialog.

Save as new View	×
Name *	
Description	
Saw	Cercel



c) To Share your view with other users, select **Saved Views** from the ribbon of the **Advanced Find** Form.



- d) Select the view you wish to share, and select **Share** from the ribbon.
- e) A new window will open; select **Add user/team** from the navigational panel on the left of the form.
- f) Add the user(s) you wish to share with and click **OK**.
- g) Select the relevant permissions you wish the user to have, and click OK



2. **REPORTING**

Go modules offer a number of Reports which allow organisations to view and manage the data collected in CRM. Many Reports use filters which can be set so that specific data can be chosen to be displayed in the Reports. Report data can be analysed so that feedback and future marketing campaigns can target specific areas.

2.1. ACCESSING REPORTS

To access the Reports that are currently available in your system, the following instructions should be completed.

a) Within CRM select the **Microsoft Dynamics CRM** tab on the navigation bar before choosing **Workplace** from the drop down.



b) Select Workplace on the navigation bar and from the drop down select Reports

A Microsoft Dynamics CRM 🖬 👘 👘 🖬 🖬	- Duriter ds -				⊕ onee	System Admittal	0 1
Ny Wole		_					
11 . B	. =		10	101	. 3	5 - Sati	
DEBECKERS ACTIVITE	CALINDRA .	B#IONTE	OUPLICATE DETECTION	D/IUIT	+00033	Holoins	

c) A new page will open displaying a list of the Available Reports in the system. To open a Report, hover over the applicable Report with your curser, before double clicking the Report to open.





d) A new window will be opened displaying the Report Viewer, some reports <u>will require filters</u> to be set whereas others will automatically generate.

110.00000000000000000000000000000000000		weet Goose 4 Contact Summary - Internet Exposer	A DECKARD
			8.9
wort filling cities			
Castaria			
Doir (Climat	H Hand St.		
- 200.4	Front	Active	
Seed .			
			Ina Payert 3 Clean

2.2. SETTING THE FILTERS OF A REPORT

Upon selecting a Report, it is possible with some of them, to set filters so that the Reports only show specific and targeted information. Filters work in a similar manner to the Advanced Find function where both Fields and Related Fields of content can be filtered to be shown in the Report.



Note. If no filters are set, the Report can still be generated, however all of the data applicable to the selected report will be applied and used in the Report.

The fields and related fields which can be filtered depend on the Report that is being used. For example in the Green 4 Contact Summary Report, the fields and related fields where filters can be selected, will comprise of those in or related to the Contact form.

It is possible to see where the fields and related fields are linked to, by viewing the content record type form name, below the Report Filtering Criteria title, as highlighted below.

Report Filtering Criteria	
Contacts	
🛅 Clear 🛛 📘 🖸 Group AND	Group OR
Select	

To Filter, complete the following instructions within the Report Viewer.

a) With the Report Filtering Criteria view open within the Report Viewer, choose Select to add a filter.

Report Filtering Criteria	
Contacts	
T Clear Group AND . Group OR	
Select	



- b) A drop down will appear, this list may be divided into two sections displaying the following:
 - **Fields.** The top section of the list shows the fields that are part of the content record type of the report.
 - **Related.** The bottom section of the list shows all of the entities that are related to the content record type of the report.
- c) From the drop down choose the applicable filters for the report.

If a **Field** has been chosen it will be possible to change the middle column (highlighted below) controlling what must then be selected/entered in the end column. The value chosen here will determine what data is to be found in the report and whether or not it should equal, contain, not contain, begin or end with (etc.) the value that is entered in the end column.

Depending on the filter and middle column value that has been chosen, the end column may require a value using a Look Up Records to be selected, text to be entered or a further value to be selected.

Report Filtering Criteria				
Contacts				
🛅 Clear 🛛 📘 💽 Group AND	Group OR			
✓ Address 1: City	Equals	l		
Select				

If a **Related** field has been chosen a blue box will appear, and beneath this a further Field or Related field must be selected from the drop down. Again, the middle column must be given an appropriate value which will control the value that is to be entered in the end column

Report Filtering Criteria				
Contacts				
📩 Clear 🛛 📘 🔁 Group AND	Group OR			
✓ Address 1: City	Contains	✓ Lutterworth		
Select				
	Equals	Cash		
Select				

d) To add further filters choose **Select** and repeat the above instructions of choosing filters from the drop down. Multiple filters can be selected to create a chain to filter down the results that are displayed in the Report.



2.3. GENERATING A REPORT

After entering any filters, the Report can then be generated. To generate a report the **Run Report** button within the Report Viewer must be selected. A message will appear showing that the report is generating before the finalised Report can be viewed.

a) Select Run Report in the Report Filtering Criteria area of the Report Viewer.



b) The report will be generated





3. THE DATA CUBE

The Data Cube uses Excel to extract data from CRM so that it can be analysed and used even further. This is especially relevant to sales data such as for particular Fixtures, Series or other types of products. The Data Cube enables users to drill down and dig deep into the data. For example to find out the payments received per Channel on a particular date. The Data Cube is a tool which allows organisations to make even further use of the data that is collected from within CRM.

3.1. CONNECTING TO THE DATA CUBE

This section describes how to connect to the data cube via Excel. The following assumes that the data cube has been deployed and that you have access to the cube. For more information please contact your System Administrator.

To connect to the cube, complete the following instructions:

a) In Excel, from the Data ribbon, select From Other Sources followed by From Analysis Services:



b) The Data Connection Wizard will be displayed.

Connect to Database Enter the information requi	Server red to connect to the database server.	Ř
1. <u>S</u> erver name:		
1 los the fellowing 1		
Use the following U User Name: Password:		



- c) Complete the following details:
 - Server Name. Enter the name of the database server. This information will be provided by your System Administrator.
 - Log on Credentials. Select the Use Windows Authentication option unless otherwise advised by your System Administrator.
- d) When the details are complete, select Next to continue.
- e) The Select Database and Table dialog will be displayed:

1999 A. C.	Database	and Table and Table/Cube which cor	ntains the c	data you want.
		t contains the data you w	ant:	
g4_cube		cube or table:	•	
Name	Description	Modified	Created	Туре
CUBE	3	9/3/2013 10:37:03 AM		CUBE
		Cance		< Back Next > Finish

- f) Select the g4_cube database and the relevant cube as shown above. Select Next to continue.
- g) The Save Data Connection File and Finish dialog will be displayed:

					-
Save Data	Connection F	ile and Finish			10
Enter a name save.	and description	for your new Data Co	nnection file, and	1 press Finish to	TR.
File Nome:					
greg-pc g4_cub	e CUBE.odc				Browsen,
		Save parried	d in file		
Description:					
	understand what	t your data connection	points to)		
(To help others	understand what	t your date connection	n points to)		
(To help others		t your data connection	i points to)		
(To help others Friendly Name: greg-pc g4_cub	e CUBE	t your data connectio	n poents to)		
(To help others Friendly Name: greg.pc.g4_cub Search Keyword	e CLBE	t your dats connection	n points to)		
To help others Friendly Name: grag-pc g4_ub gearch Keyword	e CLBE	e to refresh data	n points to)		

h) Finally, complete the settings in the File Name and select Finish.



Note. When you have added and saved the data cube connection settings, you will be able to re-connect using the **Existing Connections** option on the **Data** ribbon. It will be necessary to re-add the data cube connection every time you start a new pivot table (new sheet) within the workbook.



3.2. BASIC CONCEPTS

The Data Cube uses pivot tables within Excel to display data extracted from the CRM database. The data displayed is not real time data but instead is a snap-shot of data taken at a designated time. Contact your System Administrator if you wish to understand when this is. When a snap shot of data is taken the data is processed and aggregated on the basis of patterns within the data.

When the connection is made to a data cube, a blank grid for the pivot table will be added and the task area will be displayed on the right-hand side of the window as highlighted below:



The Task Area is divided into two sections:

• Show fields. The top half displays a list of fields that are available to add to the report. The fields are arranged into subsets, for example Bookings, Contacts and Payments. A full list is shown below:



Note. Selecting fields from different subsets could result in extraneous data.

PivotTable Fields				
Show fields:	(All) 🔻	-Ø		
	(All)			
Ung	Black Out			
	Booking Threads			
🖻 🚺 KPIs	Bookings			
4 🔲 Activity	Contact Emails			
	Contact Mobiles	-		
	Contact Telephones			
🔺 📃 Activity				
Mir	Loyalty			
. 🗖 Adama	Payments			
	Product Payments			
	Product Sales /ance Period.Segment			
	ance renoalsegment			



- The lower half of the Task Area displays the fields that have been added to the report. The area is divided into 4 areas as described below. The fields should be dragged and dropped into the relevant area from the field list.
 - **Filters.** This area contains the fields that have been added to the report to allow filtering of the table. For example you may add the Year field to allow you to filter for a single year, rather than looking at all historical data.
 - **Columns.** This area contains the fields that determine the arrangement of data shown in the columns of the pivot table. Multiple fields can be added.
 - **Rows.** This area contains the fields that determine the arrangement of data shown in the rows of the pivot table. Multiple fields can be added.
 - **Values.** This area contains the fields that determine which data are presented in the cells of the pivot table. For example you may select to display the number of contacts or number of bookings.

Drag fields between	areas below:
FILTERS	
■ ROWS	Σ VALUES



3.3. EXAMPLE REPORTS

The following section describes how to create some example reports using the Green 4 Ticketing Data Cube. The list of reports provided in this guide is not exhaustive, and we strongly advise that after creating the examples you investigate the full scope of the data.

CONTACTS IN THE DATABASE

To create a rolling count of contacts added to the database over time:

- a) Select Contacts in the Available Fields area in the Task Area.
- b) From the Σ Contact heading drag the Contacts and Contacts Running fields into the Σ Values area:



c) Next drag the Year - Quarter - Month field (listed under Take Date) into the Rows area:

PIVOLIADIE	Fields	* ×
Show Reids: Cor	Hacto + C	
≠ □ Gender □ Gender		
a 📑 Take Date	Juarter - Month	
1 UK Lietz		
a 🛅 Variant Type	Type:Wetternt	-
	Meridian	
+ DI Venue		
111 14140		
Diag fields become	m areas before	
T PRITERS	III COLUMNS	
	T. Values	
	_	
= eows	C VALUES	
	Contacts	*
Year - Galart	ContactiRunn	



d) The following basic report, which illustrates the number of contacts added per year and the total number of contacts in your database will be displayed:

	А	В	С
1	Row Labels 🛛 🔻	Contacts	ContactsRunningTotal
2	∃ Calendar 2013	10,450	10,450
3	∃ Calendar 2014	3,214	3,214
4	∃ Calendar 2015	808	808
5	Grand Total	14,472	14,472

e) To drill-down into the data, for example to view the contacts added each month, click on the + symbol alongside the year. This will show the data split into Quarters of the year. To drill further select the + symbol next to the individual Quarters, this will show the months that make up the selected quarter. To drill even further the + symbol can be chosen once more to show the individual weeks of the month and again the + symbol can be selected to show the individual days of the chosen week.

1	A	1	C
1.	Row Labels	- Contacts	ContactsilunningTotal
ż	#Calendar 2013	10,450	10,450
1	= Calendar 2014	1,214	3,214
4	= Quarter 1, 2014	1,075	1,075
	iii January 2014	492	10,942
Ð	Week 1, 2014	77	77
τ.	Wednesday, January 01 2014	1 11	11
5 6 7 8 9	Thursday, January 02 2014	20	26
8	Friday, January 03 2014	17	13
10	Saturday, January 64 2014	7	0 23
11	Sunday, January 05 2014	16	16
١Ż	# Week 2, 2014	180	180
12	# Week 3, 2014	175	175
14	= Week 4, 2014	29	25
15	# Week 5, 2014	25	25
16	# February 2014	214	11,156
17	@ March 2014	369	11.525
18	= Quarter 2, 2014	627	622
19	# Quarter 3, 2014	1,202	1,202
20	III Quarter 4, 2014	315	315
21	#Calendar 2015	808	806
22	Grand Total	14,472	14,472

f) To filter the data, for example to only view the number of contacts added during the current calendar year, select the arrowhead alongside the **Row Labels** column heading in the pivot table. From the dialog that is displayed, select the data that you are interested in before selecting **OK**:

	Row Labels	10,450
		3,214
Yea	·	
11	Sort A tu Z	1,075
11	Sprt Z to A	622
1	More Sart Options	1,202
		315
γ.,	Short Film Franc' Yant'	808
	Label Filters #	\$4,472
	Selve filten P	
	Search Year	
	19 Identiti A01 w 10 20 Controllar 2010 10 20 Controllar 2011 10 20 Controllar 2012 10 20 Controllar 2013 10 20 Controllar 2014 10 20 Controllar 2015 10 20 Controllar 2015 10 20 Controllar 2015	



VIEWING THE DATA AS A CHART

To view the report you have created as a chart carry out the following:

a) Select the **Row Labels** heading in the pivot table.

	А	В	С
1	Row Labels 🛛 💌	Contacts	ContactsRunningTotal
2	∃ Calendar 2013	10,450	10,450
3	∃ Calendar 2014	3,214	3,214
4	∃ Calendar 2015	808	808
5	Grand Total	14,472	14,472

- b) Press F11 on the keyboard.
- c) The data will be displayed in chart format in a new sheet of the workbook.





Note. The chart will automatically update when the data displayed in the corresponding pivot table is updated.



CONTACTS BY GENDER

To further drill down into the data and view the number of contacts based on gender add the **Gender** field to the **Rows** area:

PivotTable Fi	elds 👻 🗙
Show fields: Contac	ts 🔻 🗘 🔻
✓ Gender ✓ Gender	A
✓ Take Date ▷ ✓ Year - Quant ▷ Image More Fields ▷ Image Sets	rter - Month
✓ ■ Variant Type □ Variant Type	e.Variant
Venue	•
Drag fields between a	reas below:
T FILTERS	
	Σ Values \bullet
■ ROWS	Σ VALUES
Year - Quart 🔻	Contacts 🔻
Gender 🔻	ContactsRunn 🔻
	te UPDATE
Defer Layout Upda	UPDATE

The resulting report will illustrate the number of contacts based on gender that have been added to the database during the time period selected:

	А	В	С
1	Row Labels 🛛 🔻	Contacts	ContactsRunningTotal
2	🗄 Calendar 2013	10,450	10,450
3	Female	17	17
4	Male	73	73
5	Unknown	10,359	10,359
6	Unknown	1	1
7	🗄 Calendar 2014	3,214	3,214
8	Female	2	2
9	Male	9	9
10	Unknown	3,203	3,203
11	🗄 Calendar 2015	808	808
12	Female	1	1
13	Male	6	6
14	Unknown	801	801
15	Grand Total	14,472	14,472



CONTACTS BY AGE

To further segment the data you could add age categories to the report (drag Age into the Rows area):



The resulting report will illustrate the number of contacts based on gender and age that have been added to the database during the time period selected:

	А	В	С
1	Row Labels 🛛 🔻	Contacts	ContactsRunningTotal
2	🗄 Calendar 2013	10,450	10,450
3	Female	17	17
4	0 to 9	4	4
5	10 to 19	3	3
6	30 to 39	1	1
7	40 to 49	1	1
8	90+	1	1
9	Unknown	7	7
10	Male	73	73
11	0 to 9	11	11
12	10 to 19	10	10
13	20 to 29	1	1
14	30 to 39	1	1
15	40 to 49	10	10
16	50 to 59	4	4
17	60 to 69	2	2
18	70 to 79	1	1
19	Unknown	33	33



3.4. PAYMENTS TAKEN PER CHANNEL

To view the payments taken by each channel over time carry out the following:

- a) Select **Payments** in the Available Fields area in the Task Area.
- b) From the Σ Payments heading drag the Payment into the Σ Values area

how fields: [All]	- 112	
✓ Σ Payments		100
- Paymana	COMPR.	
 E Product Pays Amount 		
No Of Per		
 E Froduct Sales 		
🗌 Attesdan	155	
Days Adv	2010 0.00 March 1990	
C) Days Man	ior	
Drag fields between	areas below:	
₩ FILTERS	II COLUMNS	
# ROWS	IC VALUES	
L	Paymant	-

c) Next drag the Month of Year and Date fields (listed under Use Date > More Fields) into the Rows area

PivotTable Fields 🔹 👻		
Show fields: (All)	• Ø •	
More Fields	Aonth Quarter Veek 'ear te yOfWeek onths reas below:	
T FILTERS	COLUMNS	
■ ROWS Month Of Year ▼ Date ▼	∑ VALUES Payment ▼	



d) Next drag the Channel Name field (listed under Channel) into the Columns area



e) Finally, drag the Year column (listed under Use Date > More Fields) into the Filters area





f) The Task Area should appear as follows:

Drag fields between areas below:		
T FILTERS		
Year 🔻	Channel Name 🔻	
ROWS	Σ VALUES	
Month Of Year 🔻	Payment 🔻	
Date 🔻		

g) At the top of the pivot table set the filter for the year you are interested in viewing data for – for example the current year:



h) The resulting report will display a list of the payments received per channel per date. Note any values shown in brackets, e.g. (500.50) represents a negative value.

Year	Calendar 201	3 .T				
Payment Row Labels	Column Labe	5.7	Bar	POS	Kiosk	Grand Total
S Month 1	25	9.00	8,328.20	104,109.20	12,470.10	125,166.50
Tuesday, January 01 2013			249.10			249.10
Wednesday, January 02 2013				1,533.00		1,533.00
Thursday, January 03 2013				520.50		520.50
Friday, January 04 2013			894.00	19,882.50		20,776.50
Saturday, January 05 2013				3,344.60		3,344.60
Monday, January 07 2013				3,115.30		3,115.30
Tuesday, January 08 2013	18	3.80	545.10	1,719.00	1,355.50	3,803.40
Wednesday, January 09 2013				7,107.00		7,107.00
Thursday, January 10 2013				1,129.00		1,129.00
Friday, January 11 2013			1,393.90	4,795.50	8,153.70	14,343.10
Saturday, January 12 2013			787,40	533.00		1,320.40
Monday, January 14 2013				857.80		857.80
Tuesday, January 15 2013				985.00		985.00
Wednesday, January 16 2013			91.20	(500.50)		(409.30)
Thursday, January 17 2013				501.00		501.00
Friday, January 18 2013			343.70	(183.00)		160.70
Saturday, January 19 2013			1,481.50	3,295.50		4,777.00
Sunday, January 20 2013		5.20	1,740.40	8,790.00	2,960.90	13,566.50



3.5. TICKET SALES PER FIXTURE

To view the tickets sales for a particular fixture:

a) Select Product Sales in the Available Fields area in the Task Area.



b) From the Σ Product Sales heading drag the People and Quantity into the Σ Values area



c) Next drag the Product Type, Product and Variant fields into the Rows area

PivotTable Fields 🔹 👻			
Show fields: Product Sales 🔻			
 ✓ Product On Sale ✓ Product ✓ Product Type ☐ Report Category 			
 Product Category Parent Category More Fields Category Name Product Variant Variant 			
Drag fields between areas below:			
T FILTERS	III COLUMNS Σ Values ▼		
■ ROWS Product Type ▼ Product ▼ Variant ▼	Σ VALUES People ▼ Quantity ▼		



d) Finally, drag the **Fixture** column into the **Filters** area

PivotTable Fields 🔹 💌				
Show fields: Produ	uct Sales 🔻 😫 🔻			
Postcode				
Entry Time Entry Time Name				
 ✓ Fixture ✓ Fixture Season 				
⊿ 📃 Gender □ Gender				
Initial Advance Period Trag fields between areas below:				
T FILTERS				
Fixture 🔻	Σ Values \bullet			
ROWS	Σ VALUES			
Product Type 🔻	People 🔻			
Product 🔹	Quantity 🔹			
Variant -				

e) The Task Area should appear as follows:

Drag fields between areas below:		
T FILTERS		
Fixture 🔻	Σ Values \bullet	
■ ROWS	Σ VALUES	
Product Type 🔻	People 🔻	
Product 🔻	Quantity 🔻	
Variant 🔻		



f) At the top of the pivot table set the filter for the fixture you are interested in viewing data for – for example Crawley Town v Wolverhampton Wanderers in the image below:

А		В	
Fixture	Crawley Town v Wol	verhampton Wanderers (Home Tickets Only) 📃	
		Search Fixture	
Row Labels	People	Crawley Town v Wolverhampton Wander	
Fixture	<u> </u>	Crawley Town v Woodbridge Town	
Academy		Crawley v Brighton & Hove Albion - Frier	
Adult		Crawley v Milwall - Friendly	
Away Comps		Crewe Alexandra Crewe Alexandra V Crawley Town	
Adult		Dagenham and Redbridge	
Away Directors		damon test	
Adult		Doncaster Rovers	
Community		< >	
Adult		Select Multiple Items	
Directors Box Only			
Adult		OK Cancel	
Directors Guests			

- g) Next, further filter the report to show only the product type Fixture. To set the filter, select the arrow head next to the Row Labels column heading.
- h) Select **Product Type** in the drop down list at the top of the filter conditions dialog.
- i) Remove all selections except for the one alongside **Fixture** at the bottom of the dialog before clicking **OK**.

-1	A	×.	
1	Fixture	Crawley Town v Wolverhampton Wate	deners (Home Tickets Only) 📑
2	CONTRACTOR NO.	ALC: NO.	
A,	Row Labers	• eopia	
1.0	and there		3,820
Pe	ustart Type		34
24	2018107	1.1	24
11	Sart 2 to it.		36
Ĩ	Mice Sart Ophanu		14
Ť,	Save free from Thomas Appr		
	Labor Filters	*:	40
	Value Filters	ž.	40
	Jasimh Proshitt Type		400 400 403 409 400 572 560 2 4 4 4
		21.	14
	- M Geneti Alli		40
	+ 2 hituri		\$22
	in C2 More		566
	181 L. Szekresvéré		3
	ili 🗋 Malaxian		
			404
			116
			63
	- DR Carnet		
	A STATE WANTED		51

j) The resulting report will display a list of product purchases of type fixture for the selected fixture:

4	A.	the second secon	. E .
1	Fixture	Crawley Town v Wolverhampton Wanderers (Home Tickets Only)	
ž.			
3.	Now Labels	J People	Quantity
ŧ.	II Flature	3,826	3,826
8	= Academy	34	
6	Adult	34	34
7	Away Comps	м	36
8	Adult	36	
8	Away Directors		
267894	Adult		
<u>1</u>]	= Community	40	40
ų,	Adult	.40	
9	Directors Box Only	32	
54	Adult	32	
15	#Directors Guests	49	45
15	Adult	49	-49
17	= East Stand Away Seat	572	\$72
18	Adult	508	566
÷.	Junior Under 18	1	2
20	Cater	4	· 4
11	= East Stand Home Seat	498	458
ti	Adult	138	335
13	Junior Under 18	63	63
24	Carer	45	-46
23	Semiar 65+	31	51



3.6. FOOD & BEVERAGE SALES PER TERMINAL PER FIXTURE (NUMBER OF PRODUCTS)

To report on the food and beverage product sales per terminal carry out the following:

a) Select Product Sales in the Available Fields area in the Task Area.

PivotTable Fields		+ x	
Show fields: Product Sales		•	\$ v

b) From the Σ Product Sales heading drag the Quantity and Price into the Σ Values area

PivotTable F	ields 🔹 👻	
Show fields: Produc	ct Sales 🔻 😫 🔻	
 Converted Quantity Days Advance Discount Games Initial Days Advance Payment Allocated People ✓ Price Product Count Promo ✓ Quantity 		
Drag fields between a		
▼ FILTERS	III COLUMNS ∑ Values	
■ ROWS	Σ VALUES Quantity ▼ Price ▼	



c) Next drag the Fixture, Hierarchy (from under Terminal) and Product into the Rows area

PivotTable Fields **	
how fields: Product Sales 🔻 🗔 🔻	
Gender 🔺	
 Initial Advance Period Initial Advance Period.Period Initial Advance Period.Segm 	
 Product On Sale Product Product Type Report Category 	
Product Category	
Drag fields between areas below:	
T FILTERS	III COLUMNS ∑ Values ▼
≡ ROWS	Σ VALUES
Fixture 👻	Quantity 🔻
Hierarchy 🔻	Price 🔻
Product 👻	

d) The Task Area should appear as follows:

Drag fields between areas below:	
FILTERS	
	Σ Values \bullet
	· ·
ROWS	Σ VALUES
Fixture 🔻	Quantity -
Hierarchy 🔻	Price 🔻
Product 🔻	



- e) Next, it is necessary to filter the data to display the fixture of interest:
 - To set the filter, select the arrow head next to the **Row Labels** column heading.
 - Select **Fixture** in the drop down list at the top of the filter conditions dialog.
 - Remove all selections except for the one alongside the fixture of interest at the bottom of the dialog before clicking **OK**.



- f) Next, it is necessary to filter the data to display the terminals used to sell F&B only:
 - To set the filter, select the arrow head next to the **Row Labels** column heading.
 - Select **Till Group** in the drop down list at the top of the filter conditions dialog.
 - Remove all selections except for the one alongside the till groups used to sell F&B:

1	A	
1	Row Labels	3
Se	lect field:	
Til	l Group	
₽↓	Sort A to Z	
Z↓	S <u>o</u> rt Z to A	
	More Sort Options	
K	Clear Filter From "Till Group"	
	Label Filters	>
	Value Filters	•
	Search Till Group	<u> </u>
1	E Kiosk 01	
	🗄 🗹 Kiosk 02	
	E Viosk 03	-
	E Kiosk 04	
	E Kiosk 05	E
	⊞ I Kiosk 06	2
	⊞ I Kiosk 07	15
	E - Kiosk 08	
	⊞ · I Kiosk 09	
		-
	ОК	Cancel
	1 10 10 10 10 10 10 10 10 10 10 10 10 10	



g) The resulting report will display a list of the products sold via the selected till groups. The report will display the number of product sales and the total value of the products sold (using the listed selling price and not necessarily the price actually paid):

Row Labels	T Price	Quantity
St Helens Vs Leeds Rhinos	24,820.50	8,654
🗄 Kiosk 01	4,686.80	1,650
Bottled Beer 1-2-4-6-8	80.50	18
Shirley's Steak & Saints Gold Pie	102.30	31
Kiosk Burgers	102.30	31
Kiosk Fosters	1,226.50	377
Programmes	15.00	5
Kiosk Hot Dog	488.40	148
Meal Deal 1	215.00	37
Cottoms Hotpots	108.90	33
Misc	64.00	14
Kosk Crisps & Chocolate	239.00	169
Kiosk Saints Gold	1,163.90	344
Kiosk Softs	253.00	129
Kiosk Hot Drinks	628.00	314
🗄 Kiosk 02	5,686.00	1,883
Meal Deal 2	215.00	41
Bottled Beer 1-2-4-6-8	86.70	20
Shirley's Steak & Saints Gold Pie	112.20	34

3.7. FOOD & BEVERAGE SALES PER TERMINAL AND OPERATOR (REVENUE)

To report on the food and beverage revenue per terminal and payment type carry out the following:

a) Select **Payments** in the Available Fields area in the Task Area.



b) From the Σ Payments heading drag the Payment into the Σ Values area





c) Next drag the **Hierarchy** (from under **Terminal**), **Operator** and **Payment Method Name** into the **Rows** area



Next you need to select the fixture date as the filter. To achieve this drag Date (listed below Take Date > More Fields) into the Filters area.

PivotTable Fields 🔹 👻	
Show fields: Payme	nts 🔻 🗘 🔻
 ▲ Take Date ▷ Year - Quar ▲ More Fields ✓ Date Day Of N Day Of Q Day Of Y FiscalDat FiscalMat FiscalWat 	Month Quarter 'ear te yOfWeek onths teeks
T FILTERS	
Date 🔻	
ROWS	Σ VALUES
Hierarchy 🔻	Payment 🔻
Operator	
Payment Me 🔻	



e) At the top of the pivot table set the filter for the fixture date you are interested in viewing data for - for example August 30th 2013 in the image below:



- f) Next, it is necessary to filter the data to display the terminals used to sell F&B only:
 - To set the filter, select the arrow head next to the **Row Labels** column heading.
 - Select **Till Group** in the drop down list at the top of the filter conditions dialog.
 - Remove all selections except for the one alongside the till groups used to sell F&B before selecting **OK**:

ow Labels ct field: jroup Sort A to Z Sgirt Z to A More Sort Options Glear Filter From 'Till Group' Label Filters Yalue Filters		,, ,
sroup Sort A to Z Sort Z to A More Sort Options Glear Filter From 'Till Group' Label Filters		•
Sort A to Z Sgrt Z to A More Sort Options Glear Filter From "Till Group" Label Filters		,
– S <u>o</u> rt Z to A <u>M</u> ore Sort Options ⊆lear Filter From "Till Group" Label Filters		,
More Sort Options Clear Filter From "Till Group" Label Filters		,
<u>C</u> lear Filter From "Till Group" Label Filters		•
Label Filters		,
<u>V</u> alue Filters		
Search Till Group		0-
Kiosk 01		
😟 🗹 Kiosk 02		
		-
		E
	NR.	
		+
	Kiosk 01	

g) The resulting report will display a breakdown of the payments taken by operators using the selected terminals:

Date Friday,	August 30 2013
Row Labels -7 Payment	
= Klosk 01	4,402.40
⊟bar	1,897.10
Cash	1,882.10
= kiosk	2,520.30
Cash	2,529.30
Credit	
# Riosk 02	4,990.00
- bar	3,800.40
Cash	1,800.40
# kiosk	1,179.60
Cally	1,179.60
= Klosk 03	2,202.00
if ber	454.80
Cash	454.80
-kiosk	1,747.20
Cash	1,747.20
# Klosk 04	1,309.20
The	1, 309, 20
Cash	1,309.20
an address to war	3 338 60

End of Document