BF Admin Module Dashboard.doc

Last Updated: 12-Aug-2014

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1 Modification History

Date	Who	Comments
7-Sep-11	Solveda	Split from initial "BF Admin Module" document.
4-Oct-11	Solveda	- Clarified that $Sales should only include ITEM amounts (not shipping or tax). This applies to dashboard Summary, Top Products and Daily Counter - Top Products: on dashboard and detail pages; sort by Sales$, highest first. - Top Products: Clarified Virtual vs Variant; added a total line to the display
17-Oct-11	Solveda	- DashBoard "top products" rounded to whole dollars (currency)
3-Nov-11	Solveda	Corrected % computation on Recent and Prior "Trending"; added guidance for "Daily Average"
7-Nov-11	Solveda	Styling changes: recent and prior dollars changed to dark red (% still show in green or red); daily average should apply standard rounding; daily average displays #days.
7-Nov-11	Solveda	Modified the trending % again; algorithm needs to be split to consider sales<trend and sales>trend.
10-Nov-11	Solveda	Displayed dates in "Recent" and "Prior" trend are now links
30-Nov-11	Solveda	Added "Stores" to main navbar
6-Dec-11	Solveda	Added a "sub-category" display to the Top Products screen
23-Dec-11	Solveda	Do NOT truncate product name on the Analysis screen; added Item# to the Analysis display
27-Dec-11	Solveda	Added a link from Product-ID to the Product-Detail page.
27-Jan-12	Solveda	Changes to consider "Pickup-In-Store" orders (exclude from the main order analysis, and create a new section on the dashboard). **NICK TO COMPLETE**
1-Nov-12	Solveda	Use parameters for ORDER_STATUS when including sales
2-Nov-12	Solveda	Removed "Operations" items to respective sections (Orders and Ratings – see appropriate specs); removed "Best Reviewed Products" section (moved to Ratings spec).
21-Jan-13	Solveda	Added "scroller" for date selection
15-May-14	Solveda	Added Alerts
12-Aug-14	Solveda	Processing for new parameters ADM_SHOW_DASHBOARD, ADM_SHOW_DAILY_COUNTER, and ADM_SHOW_ALERTS

2 Dashboard / Home Page

2.1 Processing Introduction

- The intent of this dashboard is to provide an across-the-board snapshot of performance, best sellers and work to be done (operational)
- The basic Order Status Codes are illustrative only. Regular OFBiz status codes should be reflected in the final implementation.
- If the parameter ADM_SHOW_DASHBOARD is set to FALSE
  - Then do NOT display ANY of the dashboard sales calculations
  - Replace the primary heading with "Admin Module"

2.2 Dashboard: Online Sales

- Restricted to ONLINE sales only:
  - ORDER_ATTRIBUTE
    - ATTR_NAME = "DELIVERY_OPTION"
    - ATTR_VALUE = "SHIP_TO"
- Status Code Filter:
  - Shows ALL placed or completed orders (this applies to #Orders, $Sales and $Trend).
  - Should include Status Codes based on the system parameter ORDER_STATUS_INC_DASHBOARD
    - This parameter contains a comma-separated list of Order Status values which need to be matched to the STATUS_ID on the ORDER_HEADER entity
- Link should pass control to the Order List page, showing appropriate orders in the display. If the value is ZERO then do not display a link.
- Sales$ should be represented by ITEM sales amounts only. Shipping and Tax should NOT be included. This also applies to Recent and Prior amounts.

2.3 Dashboard: Pickup-In-Store Sales

- Restricted to Pickup-In-Store sales only:
  - ORDER_ATTRIBUTE
    - ATTR_NAME = "DELIVERY_OPTION"
    - ATTR_VALUE = "STORE_PICKUP"
- This dashboard component should ONLY be displayed if system parameter CHECKOUT_STORE_PICKUP is "true"
- Functionality is the same as "Dashboard: Online Sales" (in terms of date selectors, recent and prior sales, Order Status filtering) but will analyze Pick-up-in-Store sales only

2.4 Analysis: Top Online Products

- Should be restricted to ONLINE sales only
  - ORDER_ATTRIBUTE
    - ATTR_NAME = "DELIVERY_OPTION"
    - ATTR_VALUE = "SHIP_TO"
- Should only include up to 5 Top Products for the dates selected
- Show the INTERNAL_NAME and the PRODUCT_DESCRIPTION
- Sorted by Sales$, highest first
- The Product display should be truncated to avoid wrapping
- The "more …" link will pass control to the Top Products analysis screen

2.5 Analysis: Top Pickup-In-Store Products

- Should be restricted to Pickup-In-Store sales only
  - ORDER_ATTRIBUTE
    - ATTR_NAME = "DELIVERY_OPTION"
    - ATTR_VALUE = "STORE_PICKUP"
- This dashboard component should ONLY be displayed if system parameter CHECKOUT_STORE_PICKUP is "true"
- Functionality is the same as "Analysis: Top Online Products"

2.6 Last Order:

- this is only displayed on the main dashboard page.

2.7 Period:

- this should default to today's date
- the selection should be held as a session variable so if the user modifies the dashboard dates they should be set to those values when returning to the screen. The selections should NOT influence any other screens.
- ALL summary boxes should honor the period selection

2.8 Auto Date Selectors

The Auto Date Selectors will provide a quick and easy way to set the period, as follows:

- <

- Subtract one day from both FROM and TO date

- >
  - Add one day from both FROM and TO date

- Today:
  - set both the From and To date to the current system date

- Yesterday:
  - set both the From and To date to the current system date less one day

- WTD: Week-To-Date.
  - a prior Sunday is considered the beginning of the week;
  - the To date is set to the current system date.

- MTD: Month-To-Date.
  - the first of the current month is used for the From date;
  - the To date is set to the current system date.

- YTD: Year-To-Date.
  - the first of the current year is used for the From date;
  - the To date is set to the current system date

- All:
  - the From date is set to 01/01/2011 (or the "Production Date" in a configuration file);
  - the To date is set to the current system date.

2.9 Trend

The two "$Trend" dashboard captions are intended to provide two simple comparisons with similar periods in the past. Rules are as follows, and are based on the selection in the "Period" selector.

- First get the number of days between the From and To period selector

- If Days <= 7

  - Recent Trend FROM = Period FROM less 7
  - Recent Trend TO = Period TO less 7
  - Prior Trend FROM = Period FROM less 28
  - Prior Trend TO = Period TO less 28

Examples:

Single Day Selection (compares the same day of week to the one in a previous week and 4 weeks prior)

Period Selected	=	5/10/2011	to	5/10/2011
Recent Trend	=	5/3/2011	to	5/3/2011
Prior Trend	=	4/12/2011	to	4/12/2011

This-Week Selection (compares to last week and equivalent week 4 weeks prior)

Period Selected	=	4/17/2011	to	4/21/2011
Recent Trend	=	4/10/2011	to	4/14/2011
Prior Trend	=	3/20/2011	to	3/24/2011

- If Days <= 31
  - Recent Trend FROM = Period FROM less one month
  - Recent Trend TO = Period TO less one months
  - Prior Trend FROM = Period FROM less two months
  - Prior Trend TO = Period TO less two months

Examples:

Month-To-Date Selection (compares to the same relative period one and two months prior)eek and 4 weeks prior)

Period Selected	=	3/1/2011	to	3/25/2011
Recent Trend	=	2/1/2011	to	2/25/2011
Prior Trend	=	1/1/2011	to	1/25/2011

- If Days > 31 and <= 365
  - Recent Trend FROM = Period FROM less one year
  - Recent Trend TO = Period TO less one year
  - Prior Trend FROM = Not Applicable
  - Prior Trend TO = Not Applicable

Examples:

Year-To-Date Selection (compares to the same relative period last year)

Period Selected	=	1/1/2011	to	6/22/2011
Recent Trend	=	1/1/2010	to	6/22/2010
Prior Trend	=	N/A		

- If Days > 365
  - Recent Trend = Not Applicable
  - Prior Trend = Not Applicable

- Time consideration:
  - All FROM periods should use a time element of "00:00:00"
  - For the most part, all TO periods should use a time element of "23:59:59", with the following exception:
    i. If the Period TO selected is "today" then the results will be for today at the current system time
       1. Therefore, the time in the Recent Trend TO and the Prior Trend TO should also use the current system time

    ii. NOTE: this is simple because when comparing any sales for today we need to consider a similar historical TIME period.

Example:

6/28/2011 is assumed to be equal to "system date" or "today"

Period Selected	=	6/28/2011	to	6/28/2011
Recent Trend	=	6/21/2011 00:00:00	to	6/21/2011 14:00:00
Prior Trend	=	6/1/2011 00:00:00	to	6/1/2011 14:00:00

This will ensure that we are correctly comparing a current period of time with a relative recent period of time.

NOTE: in the above example (since 6/28/2011 is "today") we are only tracking sales from midnight to 2pm. In order to have a fair comparison we are comparing the same historical time period.

Example:

6/28/2011 is assumed to be equal to "system date" or "today"

Period Selected	=	6/27/2011	to	6/28/2011
Recent Trend	=	6/20/2011 00:00:00	to	6/21/2011 14:00:00
Prior Trend	=	5/31/2011 00:00:00	to	6/1/2011 14:00:00

- Trending
  - The trending is based upon DOLLAR computations
  - It's a simple comparison between the $Sales column and the $Trend columns (one for Recent, one for Prior)
  - The formula should be implemented as follows:

If Sales < Trend
    (Sales – Trend) / Sales * 100
Else
    (Sales – Trend) / Trend * 100

Examples:

Sales	=	$1,254;
$Recent-Trend	=	$1,350
$Prior-Trend	=	$1,198

Computations:

$Recent-Trend	=	(Sales - Recent-Trend-Dollar) / Sales * 100
	=	($1,254 - $1,350) / $1,350 * 100
	=	-7.65%
$Prior-Trend	=	(Sales - Prior-Trend-Dollar) / Prior-Doll * 100
	=	($1,254 - $1,198) / $1,198 * 100
	=	4.67%

Results:

$Sales	=	**$1,254**
$Recent Trend	=	**↓ 7.7%**
$Prior Trend	=	**↑ 4.7%**

- Captions
  - The captions should show either a single date, or a date range
  - The actual dates should be a smaller font

Example, single date:
$Recent Trend (5/3/11):
$Prior Trend (4/12/11):

Example, date range:
$Recent Trend (5/3/11 to 5/10/11):
$Prior Trend (4/12/11 to 4/19/11):

- NO results
  - When summing Sales for a Recent-Trend or Prior-Trend the number-of-orders should also be summed
  - If the number-of-orders is ZERO then display "N/A" in the field

Example:

$Sales	=	**$1,254**
$Recent Trend	=	**N/A**
$Prior Trend	=	**N/A**

  - the same is true if Sales for the Period-Selector is zero

- Date "links"
  - The dates displayed should provide an easy way to modify the main selection dates
  - Clicking on a date will modify from/to and execute the "change" function

2.10 Daily Average

- The Daily Average is a simple daily average for both Orders and Dollars.

- Daily Average Formula:
  - #Days = (number of days being analyzed)
  - Average Orders = Total-Orders / #Days
  - Average Dollars = Total-Dollars / #Days

- Consider the following:

  - Dates: 5/18/2011 thru 5/20/2011
  - Summary for Period: 373 orders $108,987

  - Average:

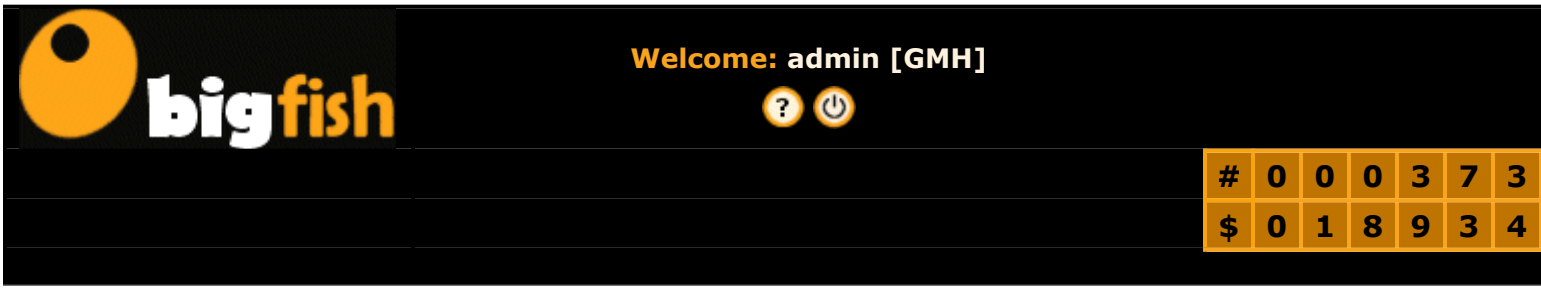
    - #Days = 3
    - Average Orders = 373 / 3
      = **124**

- Average Dollars = $108,987 / 3
  = **$36,329**

Daily Average (3 days):	**124**	**$36,329**

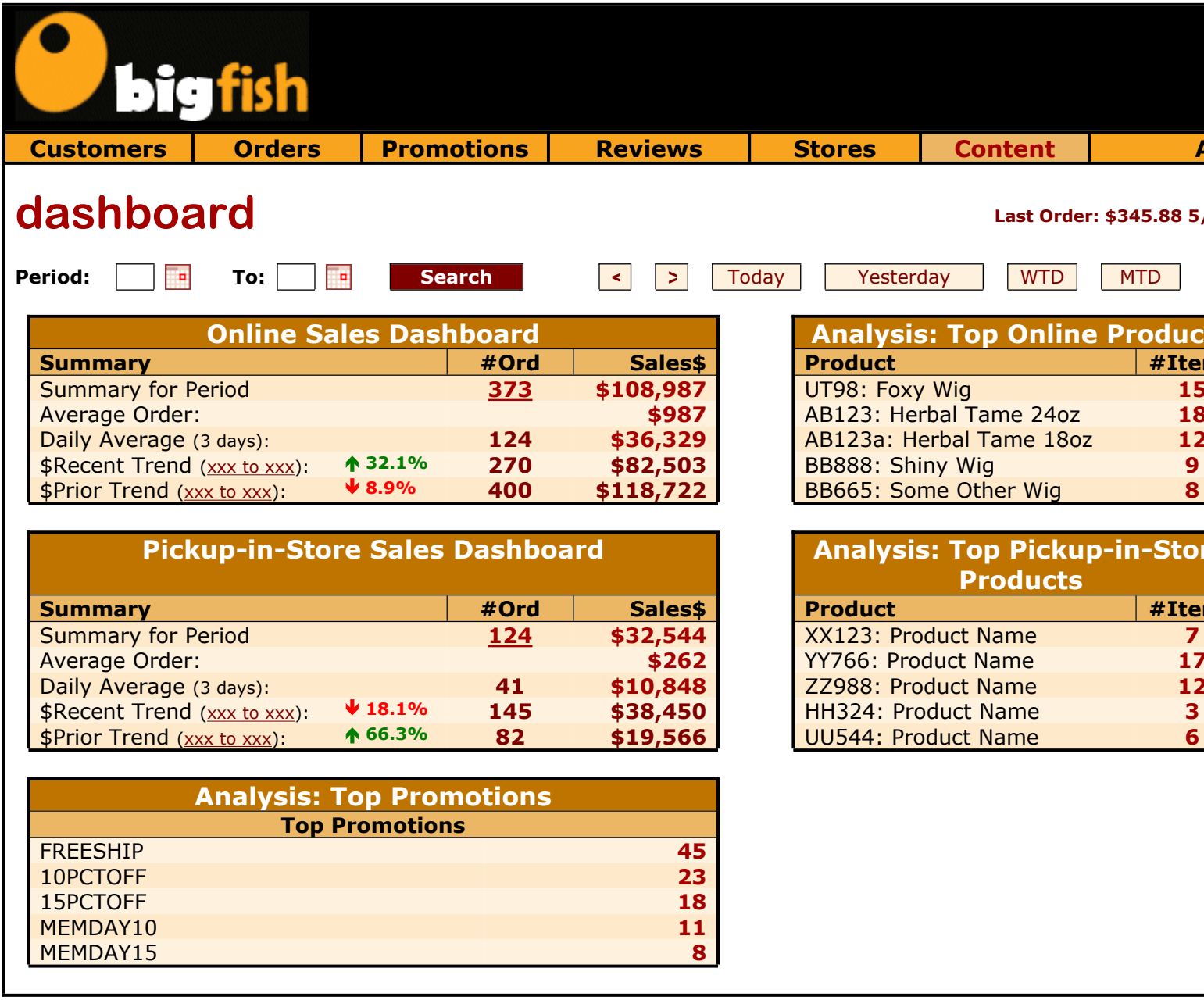
- Rounding: standard rounding should apply
- There is NO special processing if the from-date is equal to "today"
- The number of days should be displayed

2.11 Daily Sales Counter



- If the parameter ADM_SHOW_DAILY_COUNTER is set to FALSE
  - Do NOT display the daily counter on any of the Admin Module screens
- Counter represents #sales and total-dollars for TODAY (always TODAY, no other options)
  - Filter the ORDER_STATUS based on system parameter ORDER_STATUS_INC_DASHBOARD
- Total-Sales should be ITEM amounts only, shipping and taxes should NOT be included
- Displayed on every page, updated on every page refresh
- The "?" will display, on hover, "# of units and $ sales for TODAY"

2.12 Visual Guideline



3 Analysis: Top Products

3.1 Page Title:

- top products

3.2 Processing

- The intent is for the sum of all results on this page to match to the Dashboard Summary totals
- Date selection helper buttons operate exactly the same as the DashBoard page
- ALL products are shown for the dates selected, do not restrict to top sellers
- Sorting:
  - Default sort sequence is Sales$
  - Column-click-sort should be applied (see BF Admin General)
- Columns:
  - #Items: is the total number of items that the product has been ordered
  - #Orders: is the total number of orders
  - Sales$: is the total sales for that product. Since this is an ITEM evaluation it will NOT include Shipping or Tax amounts.

For Example:

- Assume the following Orders

Order#	Item	Desc	Qty	Price	Total Price
WS10001	UT98	Foxy Wig	2	$20.00	$40.00
	AB123	Herbal Tame 24oz	6	$3.00	$18.00
WS10002	AB123	Herbal Tame 24oz	3	$3.00	$9.00
WS10003	UT98	Foxy Wig	1	$20.00	$20.00

- Display as follows (sorted by #Items):

Product ID	Description	#Items	#Orders	Sales$
AB123	Herbal Tame 24oz	9	2	$27.00
UT98	Foxy Wig	3	2	$60.00

- Virtual vs Variant
  - This function should always show products at the VIRTUAL level.

For Example:

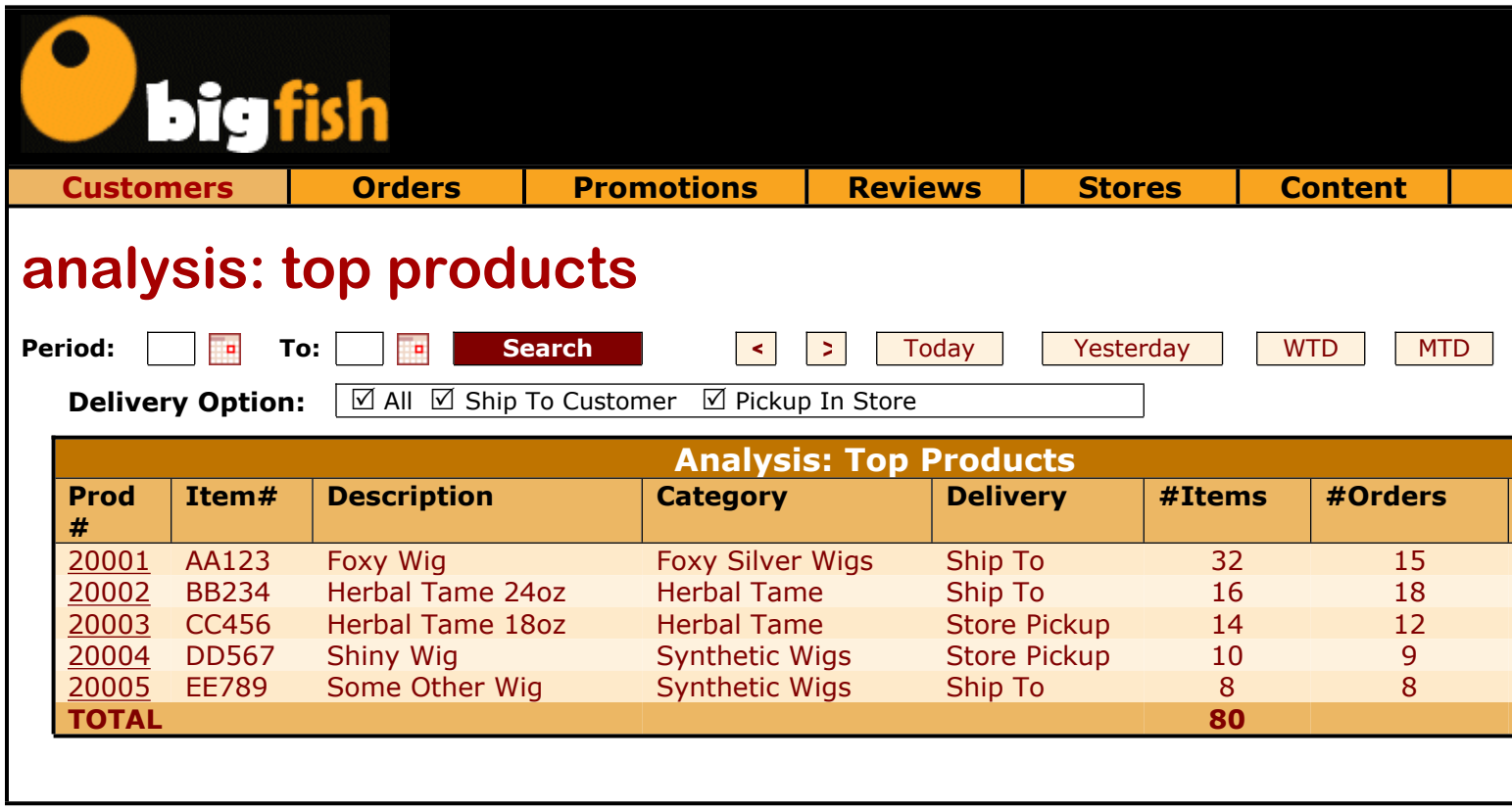
- Assume the following Orders

Order#	Virtual	Virtual Desc	Variant	Variant Desc	Qty	Price	Tota Price
WS10001	W231	KENDA	W231-MB	KENDA, Medium	2	$20.00	$40.00
WS10002	W231	KENDA	W231-DB	KENDA, Dark	6	$3.00	$18.00

- Display as follows:

Product ID	Description	#Items	#Orders	Sales$
W231	KENDA	8	2	$58.00

3.3 Visual Guideline



- Unlike the display on the main DashBoard page, the Product Description should NOT be truncated, the description can be allowed to wrap
- Product ID links to the Product Detail Page (see *BF-Admin-Module-Catalog*)

3.4 Technical Notes

- The Product-ID may be a Virtual-Only product OR a Variant product.

- In order to retrieve the parent CATEGORY it is necessary to handle each conditions separately.

- The combination of the following 2 queries should provide the total result (or equivalent services):

Query (1): handles Virtual-Only products with a simple join to the PRODUCT_CATEGORY_MEMBER table.

```
select        oi.product_id, internal_name, item_description,
              pcm.product_category_id, pc.category_name,
              sum(oi.quantity) as "Total Quantity",
              sum(oi.quantity * oi.unit_price) as "Total Dollars",
              count(distinct oh.order_id) as "From #Orders"
from          order_item oi,
              order_header oh,
              product p,
              product_category_member pcm,
              product_category pc
where         oi.order_id = oh.order_id
and           oi.product_id = p.product_id
and           p.product_id = pcm.product_id
and           pcm.product_category_id = pc.product_category_id
and           date (oh.order_date) > "from-date"
and           date (oh.order_date) < "to-date"
group         by product_id, item_description
order         by sum(oi.quantity) desc
```

Query (2): handles Variant products by joining to the PRODUCT_ASSOC table

```
Select        oi.product_id, internal_name, item_description,
              pcm.product_category_id, pc.category_name,
              sum(oi.quantity) as "Total Quantity",
              sum(oi.quantity * oi.unit_price) as "Total Dollars",
              count(distinct oh.order_id) as "From #Orders"
from          order_item oi,
              order_header oh,
              product p,
              product_category_member pcm,
              product_assoc pa,
              product_category pc
where         oi.order_id = oh.order_id
and           oi.product_id = p.product_id
and           p.product_id = pa.product_id_to
and           pa.product_id = pcm.product_id
and           pa.product_assoc_type_id = 'PRODUCT_VARIANT'
and           pcm.product_category_id = pc.product_category_id
and           date (oh.order_date) > "from-date"
and           date (oh.order_date) < "to-date"
group by product_id, item_description
order by sum(oi.quantity) desc
```

4 Dashboard Alerts

4.1 Overview

- Dashboard Alerts will be displayed in a separate following primary Dashboard display
- If the parameter ADM_SHOW_ALERTS is set to FALSE
  - Then do NOT display any information in this section

4.2 Processing

- Processing is determined by the thresholds defined in the parameters_alerts.xml file

ALERT_JOB_SANDBOX_ROWS	If the total number of rows in the JOB_SANDBOX entity exceeds the parameter value then trigger an alert. The default value for this parameter is 100000.
TBD	

4.3 Visual Guideline

dashboard alerts

Alerts
 The database entity JOB_SANDBOX has in excess of [n] rows. This normally indicates a large number of scheduled jobs. Each scheduled job, when completed, will generate a FINISHED job entry. Eventually the table of scheduled jobs gets large and requires routine maintenance. To perform routine maintenance use the following function: Admin -> Tools -> System Health Check -> Scheduled Job Click on the "Scheduled Jobs Analysis" and use the helper functions to clean up.
 Another alert
 Another alert To modify the threshold for any alert use the following function:  Admin -> Tools -> BigFish Parameters Select the parameters_alerts.xml file and click Search. From the list the alert thresholds can be modified.

- The "Info" should only be displayed if there are alerts displayed

- In other words, if there are no alerts to display then the entire component should not be displayed

4.4 Actions

- "Scheduled Job" link: go to the appropriate function
- "BigFish Parameters" link: go to the appropriate function