



**Spider
Strategies®**

What's New in 5.0

Guide to new features in Spider Impact 5.0
Updated October 16th, 2021

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Your success is important to us!

The defining feature of Spider Impact 5 is Datasets. It's business intelligence that powers strategic management. With Datasets you can track and explore low-level data, and then aggregate that data into scored KPIs. Data governance & security controls make sure everyone can see exactly the data they should, and nothing more.

Even without datasets, Impact 5 would be a huge software release. We're introducing a full-featured report writer that creates beautiful, customized reports for scorecards, initiatives, and datasets. We've got a brand-new chart designer with powerful display options like predictive analytics and reference lines & bands. There are 8 new infographic widgets for your dashboards, including process charts, waffle charts, funnels, pyramids, and filled containers.

Simply put, Spider Impact 5 is a massive leap forward in strategic management.

Please don't be intimidated by the 200-page document you're reading. We wanted to make sure we fully explained Datasets, and almost half of this "what's new" guide focuses solely on that. Use the Table of Contents liberally, and know that full interactive documentation is available in our knowledge base at <https://support.spiderstrategies.com/hc/en-us/categories/360002648452-Using-Spider-Impact>

To help you discover everything Spider Impact has to offer, we have free training videos on our website, and we've put together new functionality guides like this one. We're also hosting a series of free online webinars to walk you through the new features.

If you want to maximize your return on investment, we offer paid formal training courses and dedicated consulting engagements. Most of our customers prefer the flexibility of contracting for remote (web-based) assistance, but we also have on-site services available if they're a better match for your requirements.

We have more information about all of our free and paid services at <https://www.spiderstrategies.com/services/>

Datasets

Exploring dataset data

Overview

Spider Impact tracks three types of performance data.

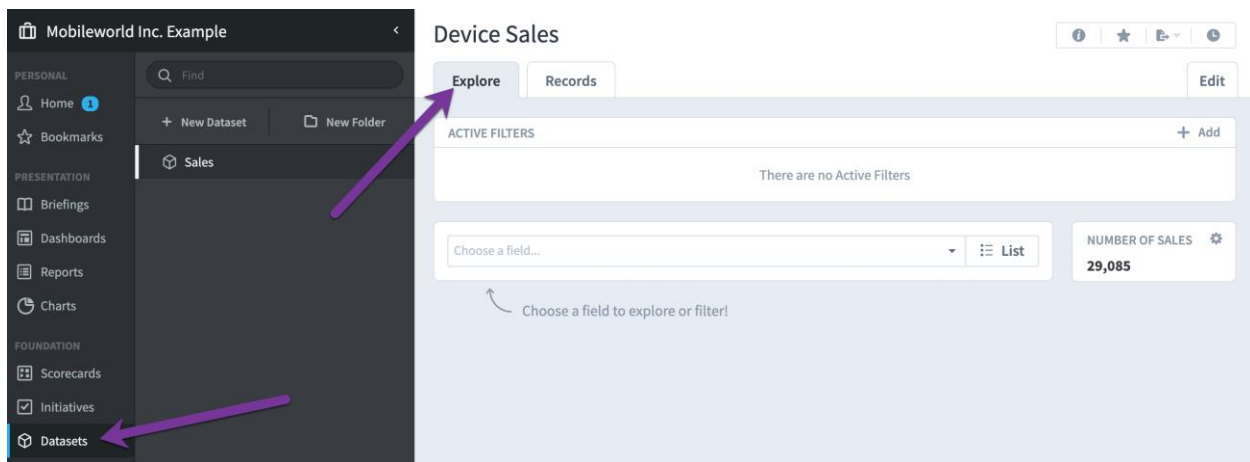
1. Scorecards measure the same things over and over. They're all about setting goals for KPIs, and then using that information to see how you're performing with your big-picture strategy. The KPIs you measure this year will usually be the same KPIs you measure next year.
2. Initiatives are temporary. They have start and end dates and usually last less than 18 months. You put initiatives in place to fix the problems you find in the Scorecards section.
3. Datasets track unstructured raw data that isn't scored. They're the business intelligence layer underneath your strategic management. You can analyze and report on dataset data directly, and you can aggregate dataset data to power KPIs in the Scorecards section.



This section focuses on Datasets. We'll cover how they're used, and what makes them such a powerful addition to Spider Impact.

The Explore tab

The Datasets section is great for exploring your data and quickly answering questions. It's all about slicing and dicing your data on the fly to get the answers you need immediately.

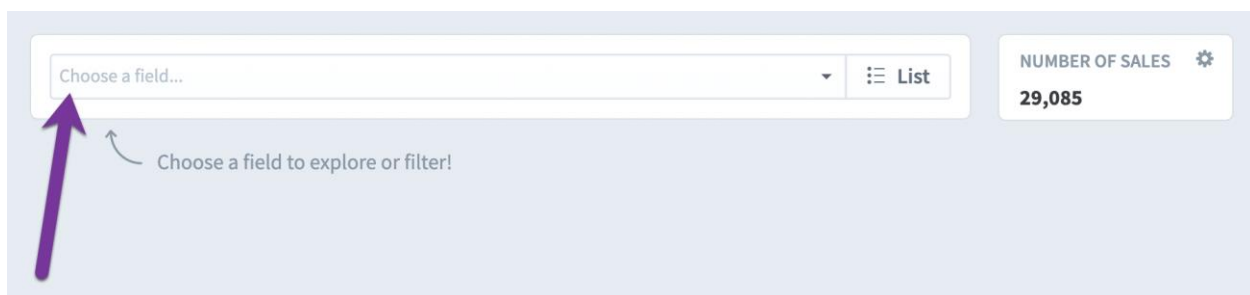


It's important to keep in mind that the Datasets section is not a presentation tool. It's the place where you store and explore all of your data. When it's time to show your dataset data to other people, the Dashboards, Charts, and Reports sections have everything you need.

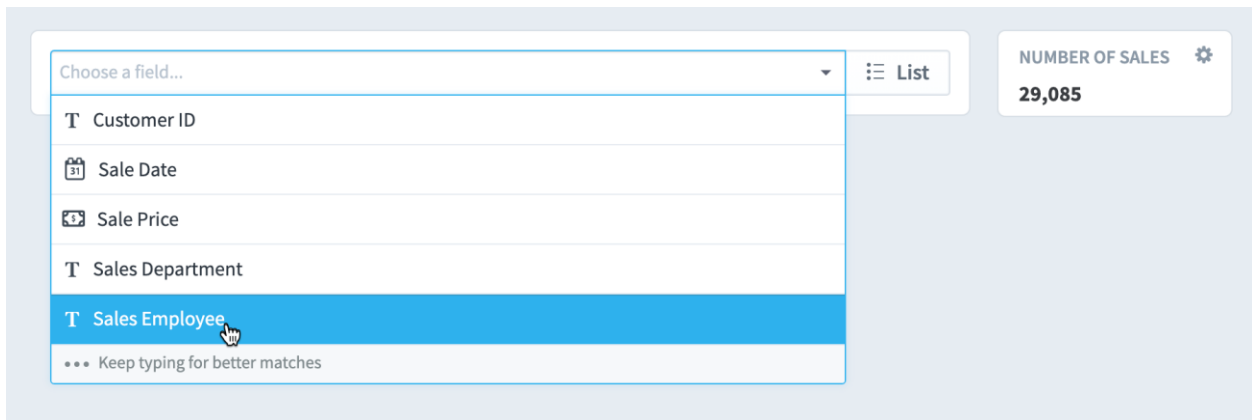
Viewing and filtering fields

We'll start with a Device Sales dataset. It contains information about the 29,085 devices our company has sold. At this point we don't know much about the data, so we'll start to explore.

To choose a field to view, click on the field menu.



This lists all of the dataset's fields. As you can see, there's information about things like the sale date, the price, and the customer. We'll chose Sales Employee.



This adds a table breaking down all of the sales in this dataset by sales employee. Issac Bernhardt is in the lead with 5,717 sales.

SALES EMPLOYEE		
SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	5,717	19.66%
Odell Sheler	5,104	17.55%
Hollie Pennigton	4,943	17%
Micheline Turkasz	4,713	16.2%
Delphine Calmes	4,228	14.54%
Other (Show 3 More)	4,380	15.06%

Next, we're going to choose the Sales Date field in the main field menu. This adds another table that breaks the sales down by date. As you can see, May 2021 was our best sales month.

Choose a field... List

NUMBER OF SALES **29,085**

SALES EMPLOYEE		
SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	5,717	19.66%
Odell Sheler	5,104	17.55%
Hollie Pennigton	4,943	17%
Micheline Turkasz	4,713	16.2%
Delphine Calmes	4,228	14.54%
Other (Show 3 More)	4,380	15.06%

SALE DATE		
SALE DATE	NUMBER OF SALES	SALES %
May 2021	728	2.5%
July 2021	726	2.5%
June 2021	703	2.42%

If we want to see only the sales for May 2021, we can just click on that row in the Sale Date table.

Choose a field... List

NUMBER OF SALES **728**

SALES EMPLOYEE		
SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	168	23.08%
Odell Sheler	133	18.27%
Hollie Pennigton	126	17.31%
Micheline Turkasz	111	15.25%
Delphine Calmes	104	14.29%
Other (Show 3 More)	86	11.81%

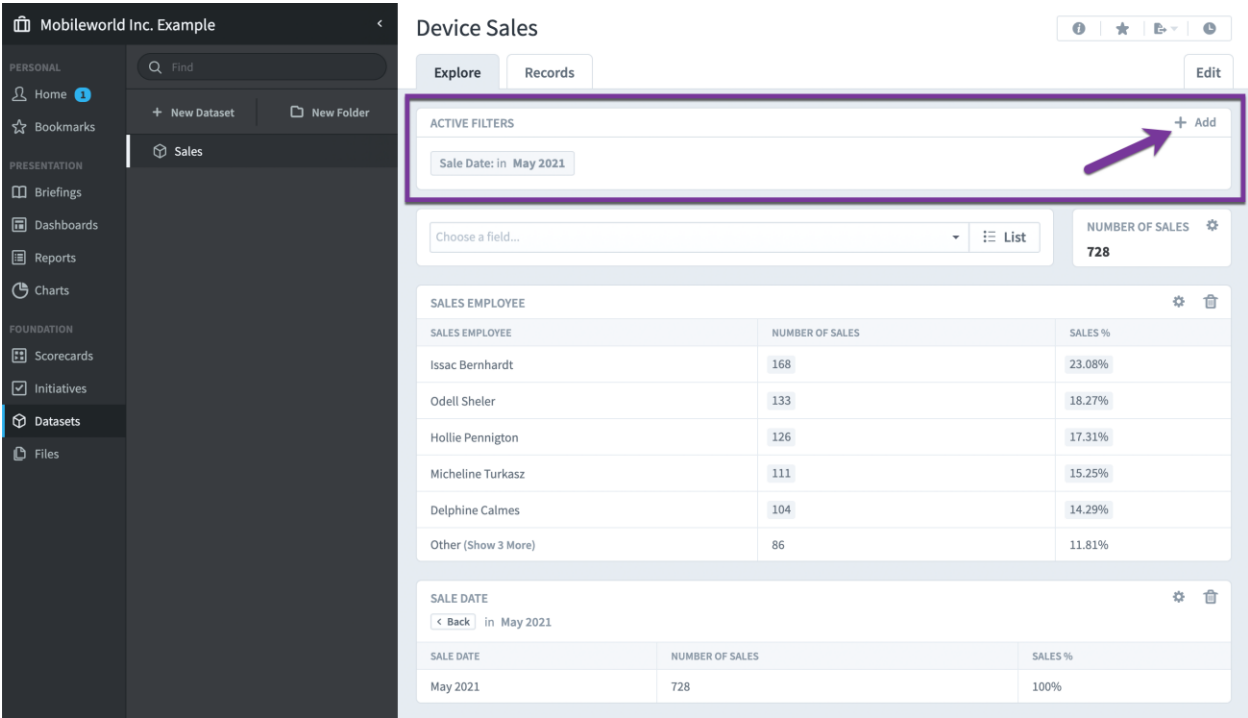
SALE DATE		
< Back in May 2021		
SALE DATE	NUMBER OF SALES	SALES %
May 2021	728	100%

This applies a "Sale Date = May 2021" filter to all of the data on the screen. In the upper right corner, we can see that the number of sales has been updated to 728. All of the numbers in the Sales Employee table now reflect only May 2021 sales. To remove the filter, just click the back button in the Sale Date table.

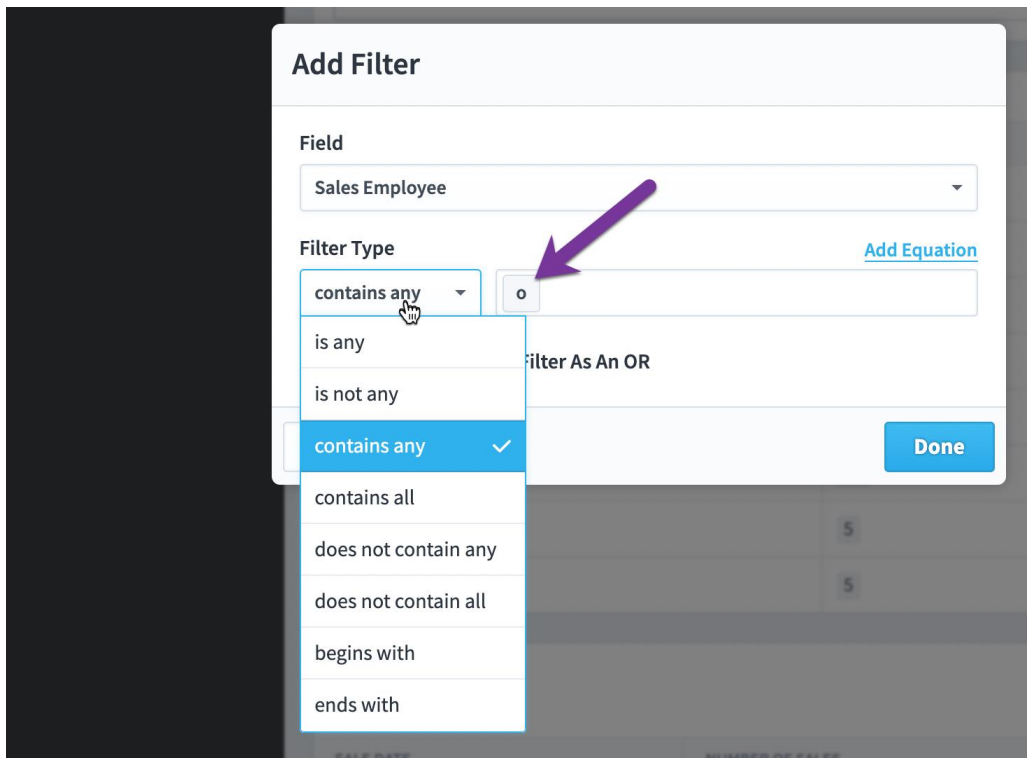
Although you can do advanced data exploration on the Datasets Explore tab, this is what most of your analysis will look like. You choose fields to view, and then you click on a row to filter.

Advanced filters

At the top of the Explore tab you can see all filters that are currently applied to the dataset. In this example we can see the "Sale Date = May 2021" filter that we applied by clicking on the "May 2021" row on the bottom. Another way to add a filter is to click on the "Add" button in the corner.



Just for the sale of this example we'll only show sales employees that have an "O" in their names.



The results of the filter are the same as before, except now we're only showing data for four of the sales reps.

ACTIVE FILTERS + Add

Sale Date: in May 2021 Sales Employee: contains o

Choose a field... List NUMBER OF SALES 340

SALES EMPLOYEE Back contains o

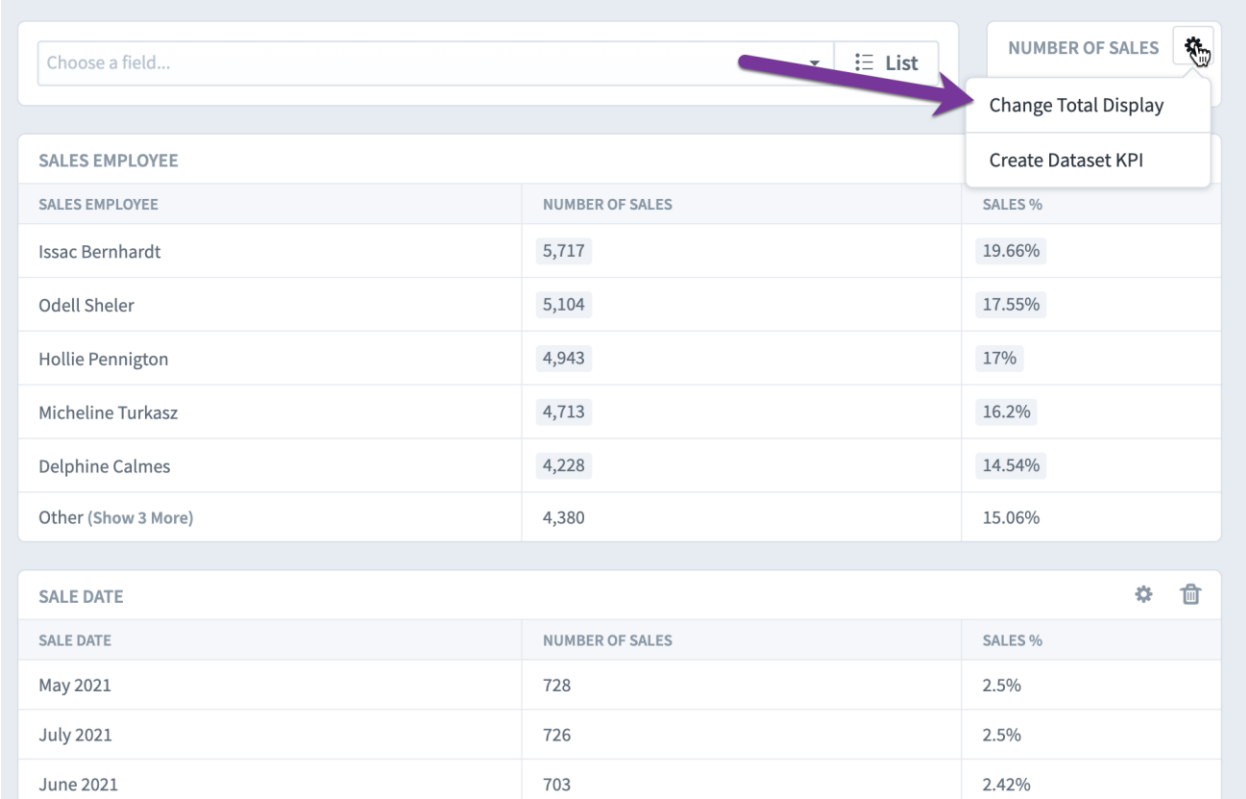
SALES EMPLOYEE	NUMBER OF SALES	SALES %
Odell Sheler	133	39.12%
Hollie Pennigton	126	37.06%
Edmond Zehrbach	76	22.35%
Russell Corrick	5	1.47%

SALE DATE Back in May 2021

SALE DATE	NUMBER OF SALES	SALES %
May 2021	340	100%

Changing total display

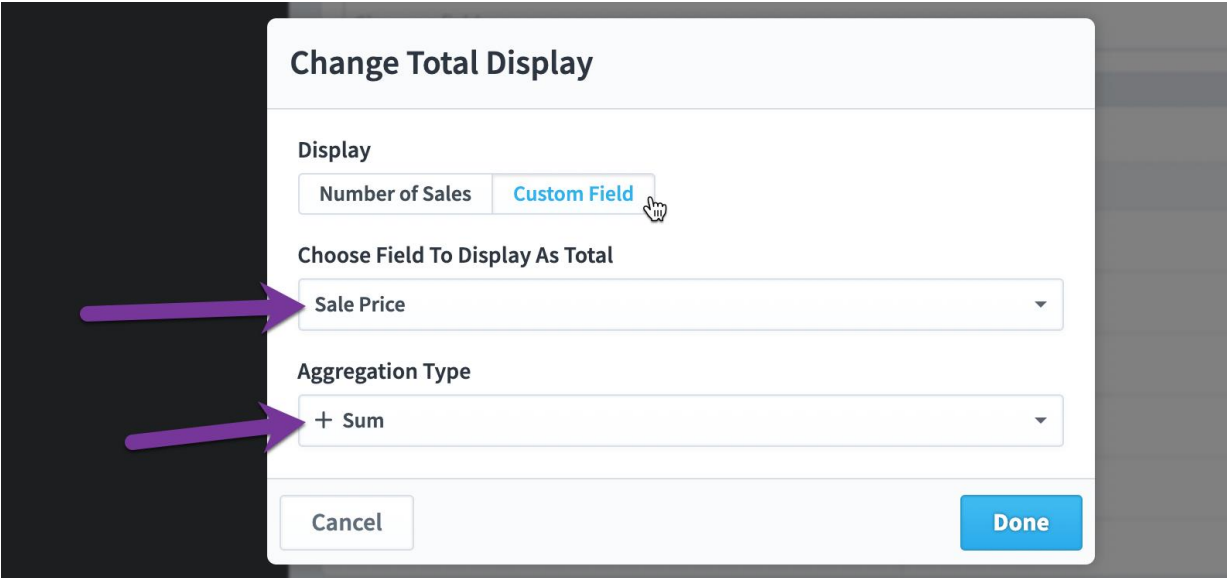
Seeing the total number of sales is interesting, but what we probably care the most about is the total value if the sales. The quickest way is to change the total display in the upper right corner.



SALES EMPLOYEE		
SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	5,717	19.66%
Odell Sheler	5,104	17.55%
Hollie Pennigton	4,943	17%
Micheline Turkasz	4,713	16.2%
Delphine Calmes	4,228	14.54%
Other (Show 3 More)	4,380	15.06%

SALE DATE		
SALE DATE	NUMBER OF SALES	SALES %
May 2021	728	2.5%
July 2021	726	2.5%
June 2021	703	2.42%

We'll change the display from "Number of Sales" to "Custom Field", choose "Sale Price" as the field we want to see, and "Sum" for the aggregation type.



Change Total Display

Display

Number of Sales Custom Field

Choose Field To Display As Total

Sale Price

Aggregation Type

+ Sum

Cancel Done

The sales price tells a completely different story. We now see that Kym Lavender is our top salesperson with \$6.1M in total sales, and that July 2021 was actually our top sales month by revenue.

SALES EMPLOYEE	SALE PRICE SUM	SALE PRICE %
Kym Lavender	\$6.17M	21.41%
Russell Corrick	\$5.07M	17.6%
Issac Bernhardt	\$3.52M	12.23%
Odell Sheler	\$3.15M	10.95%
Hollie Pennigton	\$3.08M	10.68%
Other (Show 3 More)	\$7.81M	27.13%

SALE DATE	SALE PRICE SUM	SALE PRICE %
July 2021	\$797K	2.77%
March 2020	\$743K	2.58%
August 2020	\$709K	2.46%

In this example, sale price is obviously better than the number of sales, so we're going to go to the Edit tab and change the "Defaults for Total Display".

Mobileworld Inc. Example

Device Sales

Explore Records Edit

Name: Device Sales

Individual Records Track (Plural Noun): Sales

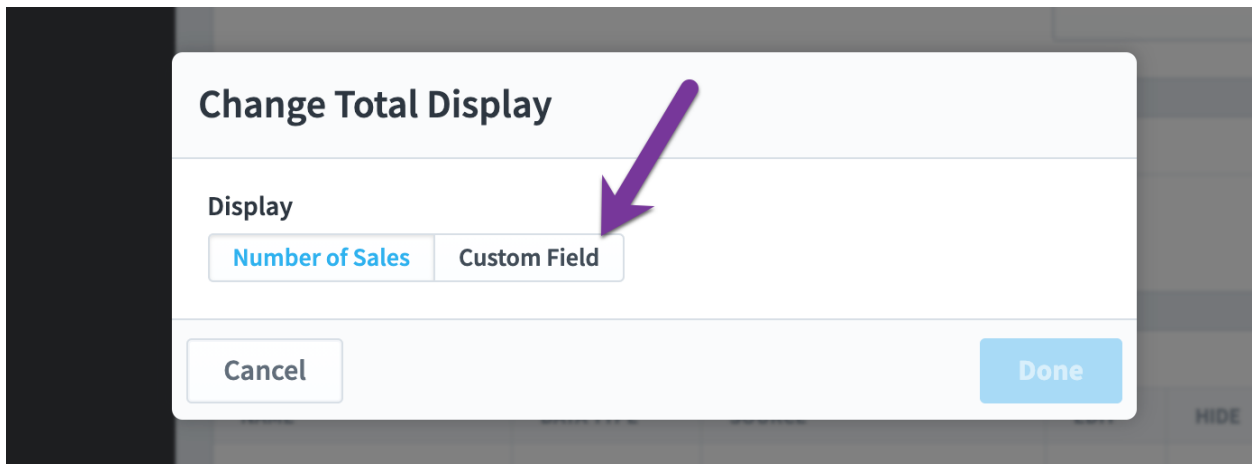
Default App Calendar Field: None (Show all time)

Primary Key Column (From Source Data): No Primary Key

Allow manually adding new records

Defaults for Total Display

We can make the change from "Number of Sales" to "Custom Field" so that next time someone explores the Device Sales dataset it will default to showing Sales Price.



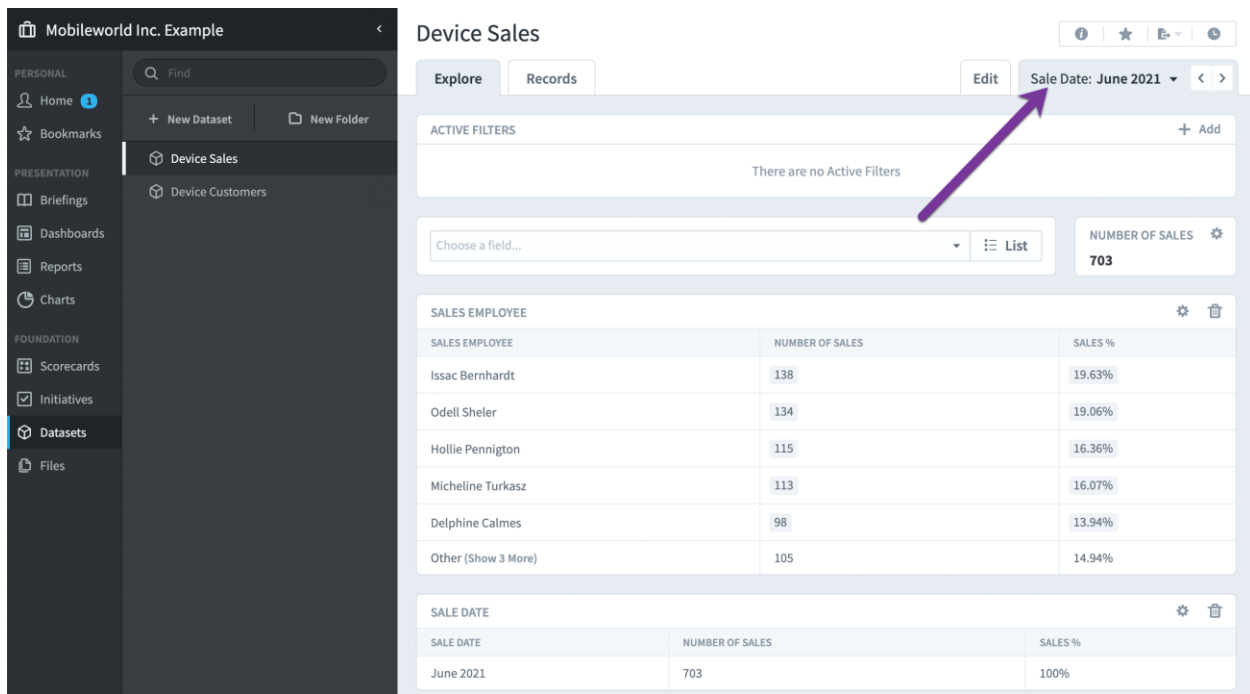
App calendar

Date fields have a "Set as App Calendar" toggle in their Options menus.

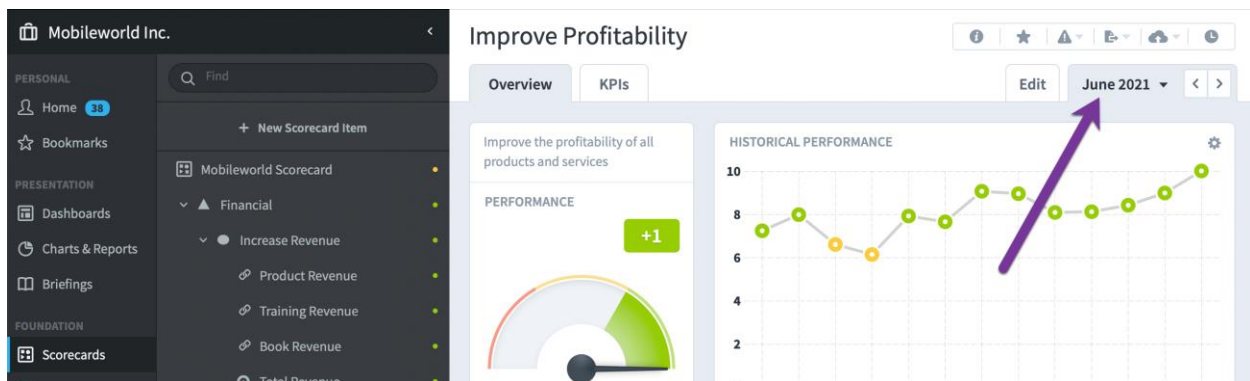
SALES EMPLOYEE	SALE PRICE SUM
Kym Lavender	\$6.17M
Russell Corrick	\$5.07M
Issac Bernhardt	\$3.52M
Odell Sheler	\$3.15M
Hollie Pennigton	\$3.06M
Other (Show 3 More)	\$7.81M

SALE DATE	SALE PRICE SUM	SALE PRICE %
July 2021	\$797K	2.77%
March 2020	\$743K	2.58%
August 2020	\$709K	2.46%

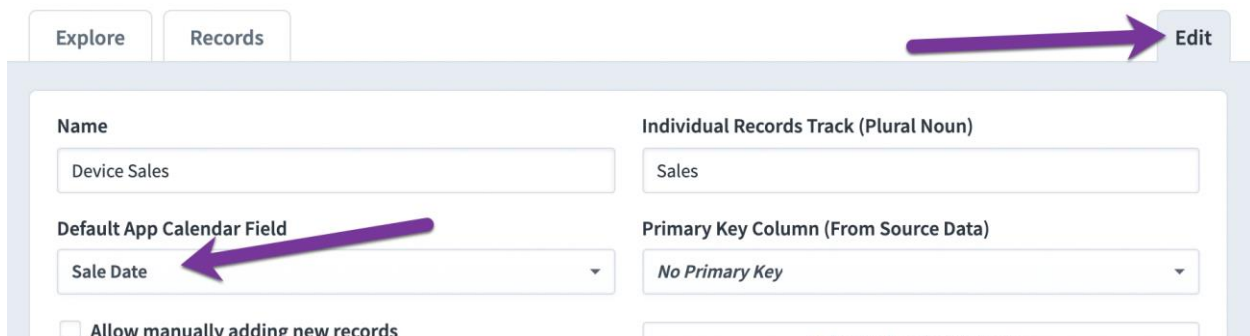
When turned on, the app calendar now shows in the Datasets section, and it's tied to the field that you've chosen. This is helpful when working with datasets that have different versions of the same data over time and you only want to show the data for one calendar period at once.



The app calendar in the Datasets section is the same selector as in other sections like Scorecards.

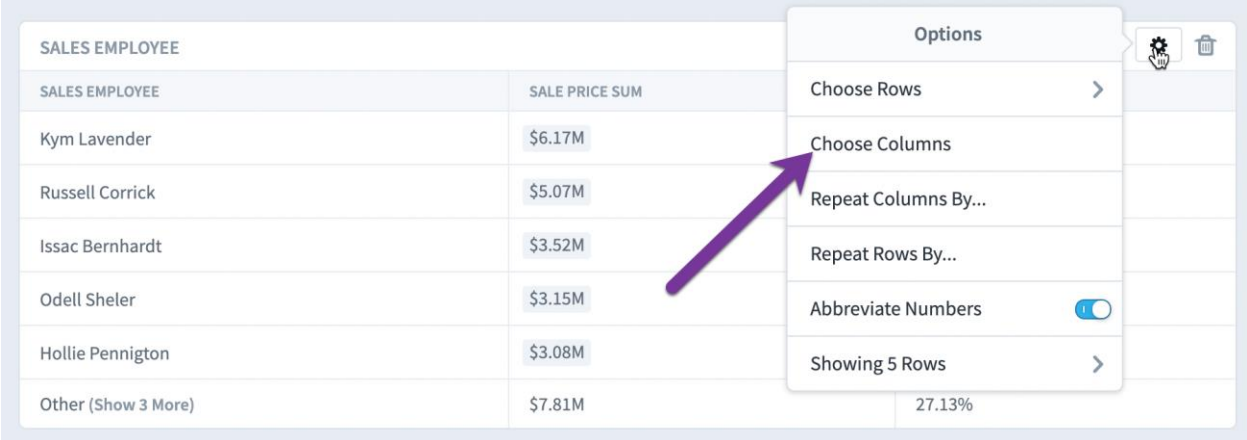


Finally, if you want a dataset to show the app calendar for a field by default, you can set the Default App Calendar Field on the Datasets Edit tab.



Choosing columns

Another way to change the data being displayed is to manually choose a table's columns.

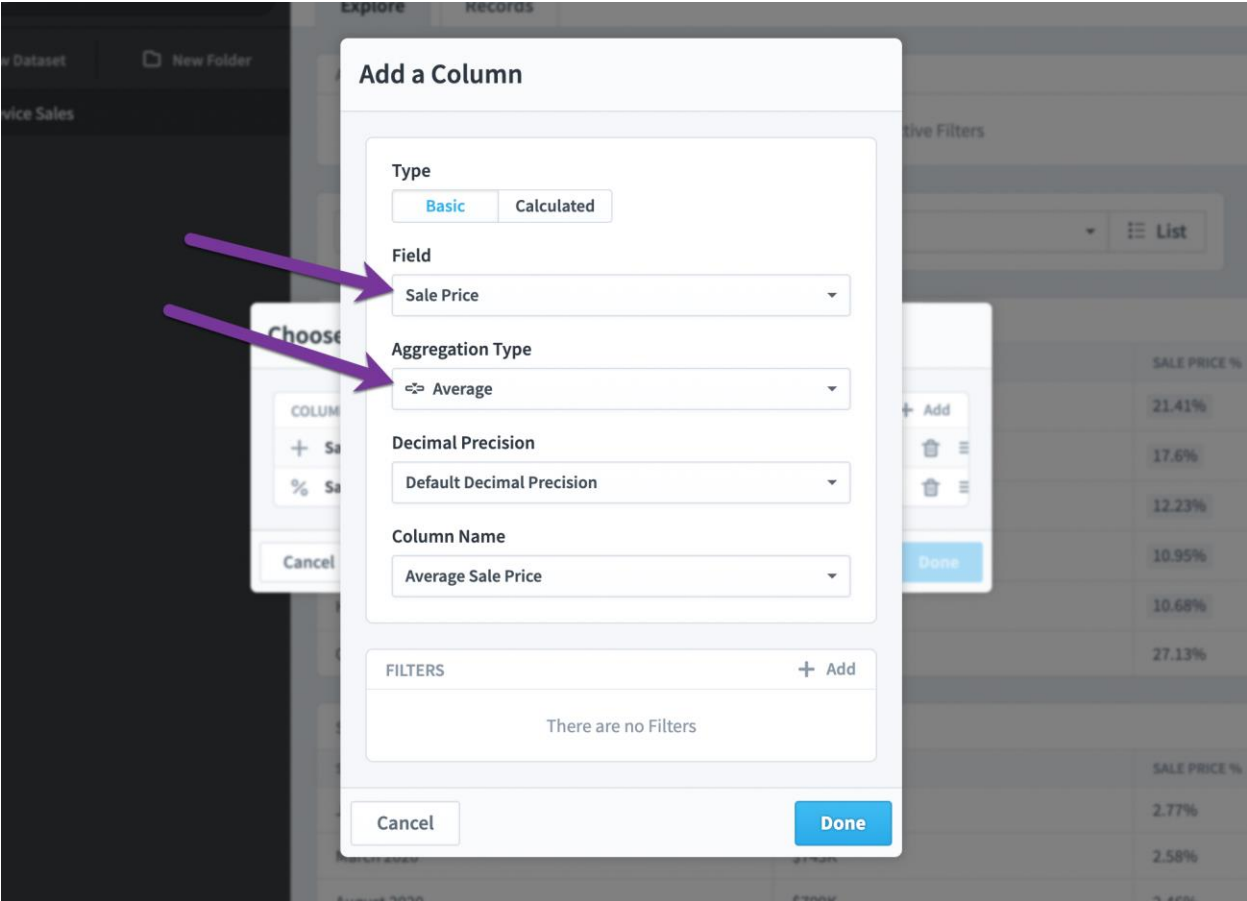


SALES EMPLOYEE	
SALES EMPLOYEE	SALE PRICE SUM
Kym Lavender	\$6.17M
Russell Corrick	\$5.07M
Issac Bernhardt	\$3.52M
Odell Sheler	\$3.15M
Hollie Pennigton	\$3.08M
Other (Show 3 More)	\$7.81M

Options

- Choose Rows >
- Choose Columns
- Repeat Columns By...
- Repeat Rows By...
- Abbreviate Numbers
- Showing 5 Rows >

We're going to add an Average Sale Price column to the Sales Employee table to figure out why our employee rankings changed so much when we switched from number of sales to total sales value.



Add a Column

Type: Basic Calculated

Field:

Aggregation Type:

Decimal Precision:

Column Name:

FILTERS:

Buttons: Cancel, Done

Sure enough, Kym and Russel had average sales around \$18,000 while everyone else was averaging less than \$700.

SALES EMPLOYEE			
SALES EMPLOYEE	SALE PRICE SUM	SALE PRICE %	AVERAGE SALE PRICE
Kym Lavender	\$6.17M	21.41%	\$17.7K
Russell Corrick	\$5.07M	17.6%	\$18K
Issac Bernhardt	\$3.52M	12.23%	\$616
Odell Sheler	\$3.15M	10.95%	\$618
Hollie Pennigton	\$3.08M	10.68%	\$622
Other (Show 3 More)	\$7.81M	27.13%	\$1,847

Repeating rows and columns

Here’s a simple table showing the sum and average sales price by month.

SALE DATE		
SALE DATE	SALE PRICE SUM	AVERAGE SALE PRICE
July 2021	\$797K	\$1,097
March 2020	\$743K	\$1,232
August 2020	\$709K	\$1,085
June 2021	\$707K	\$1,006
June 2020	\$684K	\$1,131
Other (Show 5 More)	\$25.2M	\$61.1K

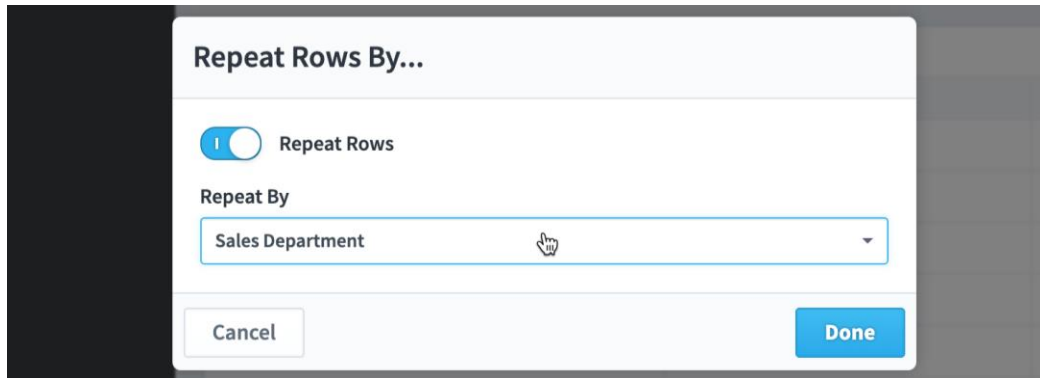
We want to see those numbers by sales department, however, so we’ll choose “Repeat Rows By…” from the options menu.

SALE DATE	
SALE DATE	SALE PRICE SUM
July 2021	\$797K
March 2020	\$743K
August 2020	\$709K
June 2021	\$707K
June 2020	\$684K
Other (Show 5 More)	\$25.2M

Options

- Choose Rows >
- Choose Columns
- Repeat Columns By...
- Repeat Rows By...
- Set As App Calendar
- Abbreviate Numbers
- Showing 5 Rows >

And we'll choose the Sales Department field.



We can now see the sum and average sale price for each of our two sales departments for every month.

SALE DATE	SALES DEPARTMENT	SALE PRICE SUM	AVERAGE SALE PRICE
July 2021	Corporate	\$357K	\$18.8K
	Retail	\$440K	\$622
June 2021	Corporate	\$280K	\$18.7K
	Retail	\$427K	\$621
May 2021	Corporate	\$196K	\$19.6K
	Retail	\$454K	\$632
April 2021	Corporate	\$139K	\$17.4K
	Retail	\$389K	\$626

Similarly, you can also choose "Repeat Columns By..." In this example we're repeating the sum and average sales columns by salesperson.

SALE DATE	SALES EMPLOYEE: DELPHINE CALMES		SALES EMPLOYEE: EDMOND ZEHRBACH		SALES EMPLOYEE: HOLLIE PENNINGTON		SALES EMPLOYEE: ISSAC BERNHARDT		SALES EMPLOYEE: KYM LAVENDER		SALE MICHE
SALE DATE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM
July 2021	\$53.6K	\$602	\$52K	\$619	\$85.5K	\$620	\$92K	\$622	\$119K	\$17K	\$74.6K
June 2021	\$61.2K	\$624	\$54.8K	\$609	\$72.6K	\$632	\$85K	\$616	\$125K	\$17.8K	\$70.1K
May 2021	\$64.9K	\$624	\$49.1K	\$647	\$79.8K	\$633	\$109K	\$650	\$94.6K	\$18.9K	\$66.6K
April 2021	\$49.9K	\$616	\$49.1K	\$606	\$68K	\$624	\$76.2K	\$630	\$32.2K	\$16.1K	\$65.8K
March 2021	\$56.8K	\$638	\$52.5K	\$617	\$69.8K	\$629	\$82.5K	\$620	\$69.3K	\$9,903	\$61.6K
February 2021	\$56.9K	\$632	\$55.5K	\$646	\$68.1K	\$636	\$79.4K	\$616	\$77.4K	\$12.9K	\$66.7K
January 2021	\$65.8K	\$621	\$52.6K	\$627	\$71.3K	\$625	\$77.4K	\$619	\$97K	\$13.9K	\$71.7K

Saving views

As mentioned earlier, the Datasets section is not meant to be a presentation tool. There are times, however, when you'll want to save the tables and filters that are on the Explore tab so you can view them later. All you need to do is click the Save button on the bottom...

The screenshot shows the 'Device Sales' dataset view. The table displays sales data for various months and sales employees. The 'Save' button is located at the bottom right of the table area.

SALE DATE	SALES EMPLOYEE: DELPHINE CALMES		SALES EMPLOYEE: EDMOND ZEHRBACH		SALES EMPLOYEE: HOLLIE PENNINGTON		SALES EMPLOYEE: ISSAC BERNHARDT		SALES EMPLOYEE: KYM LAVENDER		SALE MICHE
	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM
July 2021	\$53.6K	\$602	\$52K	\$619	\$85.5K	\$620	\$92K	\$622	\$119K	\$17K	\$74.6K
June 2021	\$61.2K	\$624	\$54.8K	\$609	\$72.6K	\$632	\$85K	\$616	\$125K	\$17.8K	\$70.1K
May 2021	\$64.9K	\$624	\$49.1K	\$647	\$79.8K	\$633	\$109K	\$650	\$94.6K	\$18.9K	\$66.6K
April 2021	\$49.9K	\$616	\$49.1K	\$606	\$68K	\$624	\$76.2K	\$630	\$102K	\$16.1K	\$65.8K
March 2021	\$56.8K	\$638	\$52.5K	\$617	\$69.8K	\$629	\$82.5K	\$620	\$69.3K	\$9.903	\$61.6K
February 2021	\$56.9K	\$632	\$55.5K	\$646	\$68.1K	\$636	\$79.4K	\$616	\$77.4K	\$10.9K	\$66.7K
January 2021	\$65.8K	\$621	\$52.6K	\$627	\$71.3K	\$625	\$77.4K	\$619	\$97K	\$13.9K	\$71.7K

Give the Dataset View a name...

The 'New Dataset View' dialog box is shown with the following content:

New Dataset View

Name

Average and Total sales by Salesperson and Month

Cancel Save

And it will add your saved view underneath the dataset in the navigation pane.

Average and Total sales by Salesperson and Month

ACTIVE FILTERS: There are no Active Filters

SALE PRICE SUM: **\$28,804,269.46**

SALE DATE	SALES EMPLOYEE: DELPHINE CALMES	SALES EMPLOYEE: EDMOND ZEHRBACH	SALES EMPLOYEE: HOLLIE PENNINGTON	SALES EMPLOYEE: ISSAC BERNHARDT	SALES EMPLOYEE: KYM LAVENDER	SALES EMPLOYEE: MICHE
SALE DATE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE
July 2021	\$53.6K	\$602	\$52K	\$619	\$85.5K	\$620

You can use dataset views as starting points for further data exploration, and they're shared by everyone who uses the dataset.

Sales Leaderboard

ACTIVE FILTERS: There are no Active Filters

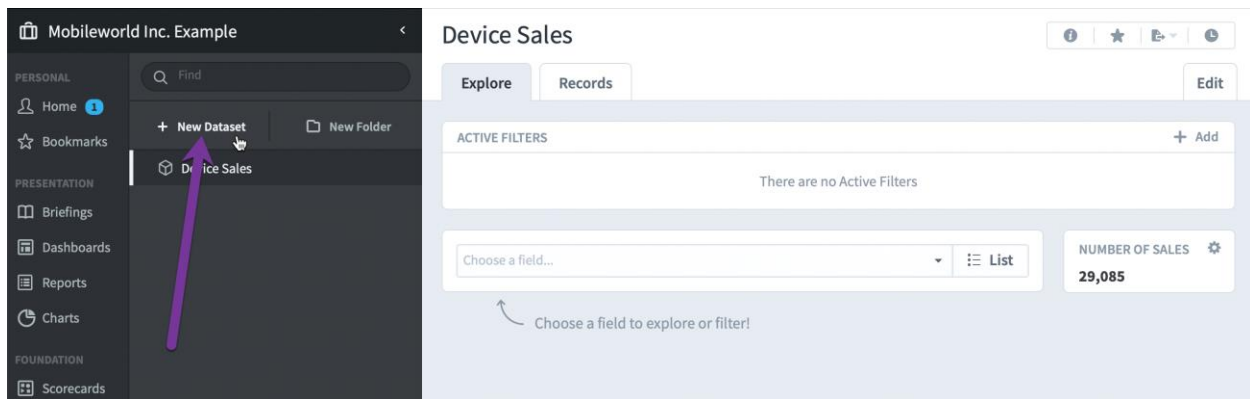
NUMBER OF SALES: **29,085**

SALES EMPLOYEE	SALE PRICE SUM	NUMBER OF SALES	AVERAGE SALE PRICE
Kym Lavender	\$6.17M	348	\$17.7K
Russell Corrick	\$5.07M	282	\$18K
Issac Bernhardt	\$3.52M	5,717	\$616
Odell Sheler	\$3.15M	5,104	\$618
Hollie Pennington	\$3.08M	4,943	\$622

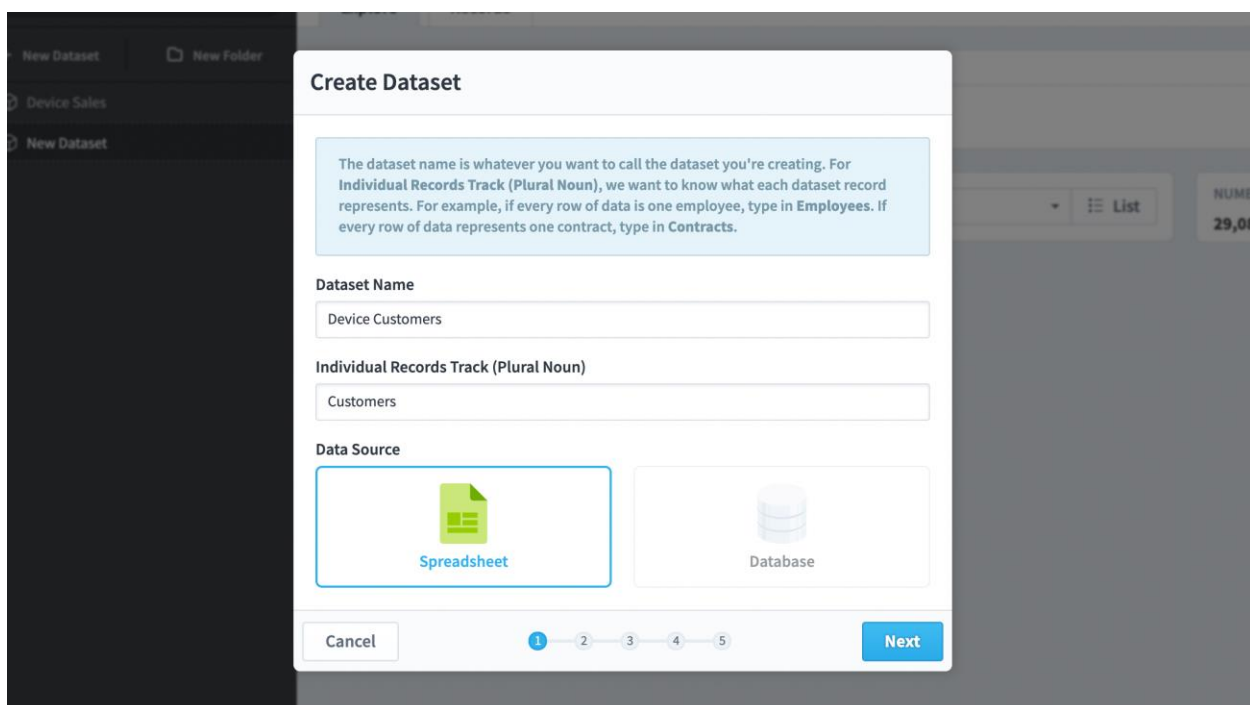
Creating and editing datasets

Creating a dataset

To create a new dataset, click on the "New Dataset" button at the top of the navigation pane.



This brings up the new dataset dialog. The “Dataset Name” is what you want to call your dataset, and it shows up in the navigation pane on the left. The answer to “Individual Records Track” should be the plural form of one row of your data. In this example, we’re tracking device customers, so we’re entering “Customers”. Finally, we can either get data from a database or spreadsheet, and we’re choosing spreadsheet.

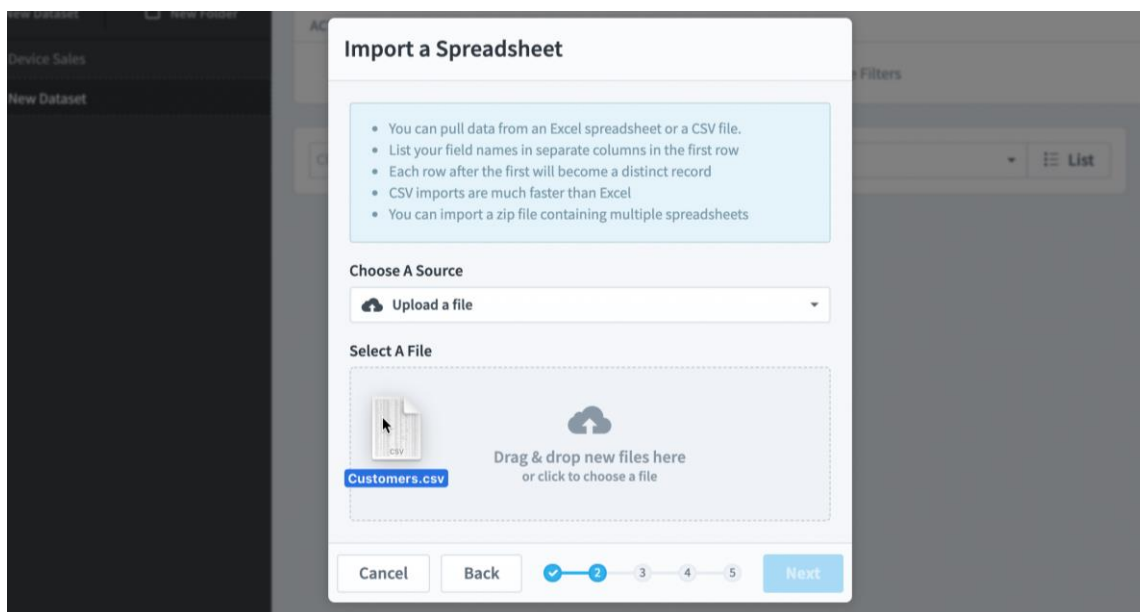


You can build a dataset from either a spreadsheet or a database. In this example we have a spreadsheet containing information about each of our customers that looks like this. Notice how each customer has a Customer ID in the first column.

Customer ID	POC First Name	POC Last Name	POC Phone Number	POC Email	Company	Address	City	County	State or Prov	Postal Code	Country
AAAV-22209	Seth	Galayda	503-365-5894	seth.galayda@gmail.com		4752 Main St #6713	Portland	Multnomah	OR	97209	United States
AABI-37357	Randy	Ferko	352-616-2023	randy@aol.com		3556 S 21st St	Ocala	Marion	FL	34470	United States
AACE-49383	Nieves	Denegre	510-635-8891	nieves.denegre@cox.net		6278 Pali Momi St #3	San Leandro	Alameda	CA	94577	United States
AACG-26513	Ema	Coodey	216-868-4825	ema.coodey@coodey.com		32 N Trimble Rd	Maple Heights	Cuyahoga	OH	44137	United States
AADO-16329	Ezequiel	Hitz	01528-767210	ehitz@hitz.co.uk		61 Maddox St	Bryanston and Dorset	Greater London		W1U 6BU	United Kingdom
AADU-61935	Clinton	Leitheiser	718-520-1697	clinton_leitheiser@hotmail.com		16573 Solano Way	Brooklyn	Kings	NY	11215	United States
AAEB-49062	Emmett	Disabato	615-984-8565	emmett@hotmail.com		6396 S Academy Blvd	Franklin	Williamson	TN	37064	United States
AAFP-40137	Gigi	Magsayo	973-383-8091	gigi@magsayo.com		517 Salina Meadows Pky	Newton	Sussex	NJ	7860	United States
AAGT-61111	Julian	Reinert	513-895-7160	julian_reinert@gmail.com		383 Old Columbia Pike	Cincinnati	Hamilton	OH	45202	United States
AAHE-89127	Bell	Hudson	856-257-8049	bell_hudson@hudson.org		69 Park Ave	Riverton	Burlington	NJ	8077	United States
AAHF-19505	Nga	Gantewood	780-399-3563	nga_gantewood@cox.net		96 E 67th St	Edmonton		AB	T6H 0H9	Canada
AAHT-21210	Lyle	Newes	03-1188-5037	lyle.newes@yahoo.com		27 Hazel St #3965	Bogong		VIC	3699	Australia
AAJF-36401	Randee	Engelkemier	301-971-4993	randee@gmail.com		7 Buena Vista Ave	Waldorf	Charles	MD	20601	United States
AAJN-83472	Shawana	Swamm	541-287-9653	shawana@gmail.com		4 Justice Rd	Eugene	Lane	OR	97402	United States
AAKG-23153	Andreas	Starek	973-634-3333	andreas.starek@cox.net		4 Veterans Blvd	Orange	Essex	NJ	7050	United States
AAKQ-27642	Angeles	Amsden	02-9557-3858	angeles@gmail.com		490 Fairfield Rd	Crows Nest		NSW	1585	Australia
AAKU-79994	Lora	Haran	514-616-2900	lharan@hotmail.com		63 N Magnolia Ave	Montreal		QC	H3T 1B8	Canada
AALE-46423	Filomena	Muschett	212-260-5945	filomena.muschett@cox.net		51632 W Oak St	New York	New York	NY	10016	United States
AALJ-34382	Jessica	Arris	01971-401513	jessica_arris@yahoo.com		5 Lord Nelson St	Rawcliffe	E Riding of Yorkshire		DN14 8TL	United Kingdom
AALZ-25758	Marcelo	Hinahon	02-3456-6002	marcelo@yahoo.com		711 Groesbeck Hwy	Carrington		NSW	2294	Australia
AAMI-65402	Gerry	Dubel	418-495-6994	gerry@hotmail.com		518 S Mullen St	Albanel		QC	G8M 3H5	Canada
AAMQ-81658	Shantelle	Demming	215-610-3435	sdemming@demming.com		6224 Fort Myer Dr	Ambler	Montgomery	PA	19002	United States
AAMV-72131	Loreta	Hutchins	01632-702159	lhutchins@gmail.com		6 Bedford St North	Addingham	West Yorkshire		LS29 0JQ	United Kingdom
AANI-24940	Ima	Breer	316-390-4501	ima_breer@yahoo.com		63703 Felix Valdez Ave	Wichita	Sedgwick	KS	67211	United States
AANM-57352	Emile	Trass	01356-426596	emile@hotmail.com		52 Anson St	Valley Ward	South Yorkshire		S65 3LR	United Kingdom
AAOI-10884	Quiana	Desjardins	973-619-1623	quiana.desjardins@aol.com		98 Hamilton Blvd	Short Hills	Essex	NJ	7078	United States
AAOV-36243	Jermaine	Snowden	01307-657754	jermaine@hotmail.com		4 Gresham St	Cwm Cadnant Comm	Isle of Anglesey		LL59 5NS	United Kingdom
AAOM-58435	Patricia	Pretzer	08-8231-8385	patricia.pretzer@pretzer.net.au		3584 S Michiean Ave #175	Sinaera		WA	6065	Australia

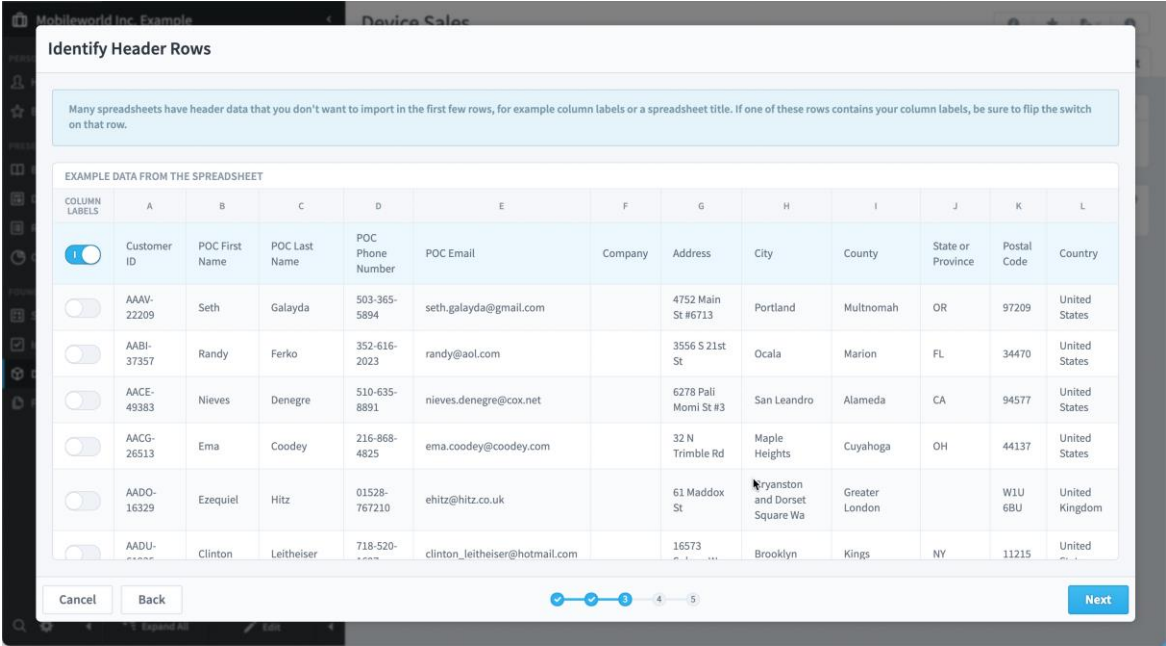
There are multiple options for where to get spreadsheets. To fully automate your data flow, you can schedule an import from Google Sheets or an (S)FTP server. If you want to build multiple datasets from the different worksheets in an Excel file, you'll probably want to store a single file in the Files section and build your datasets from that. See the *Updating Dataset Records* section below for more information.

For now, we'll just keep it simple and upload a file.

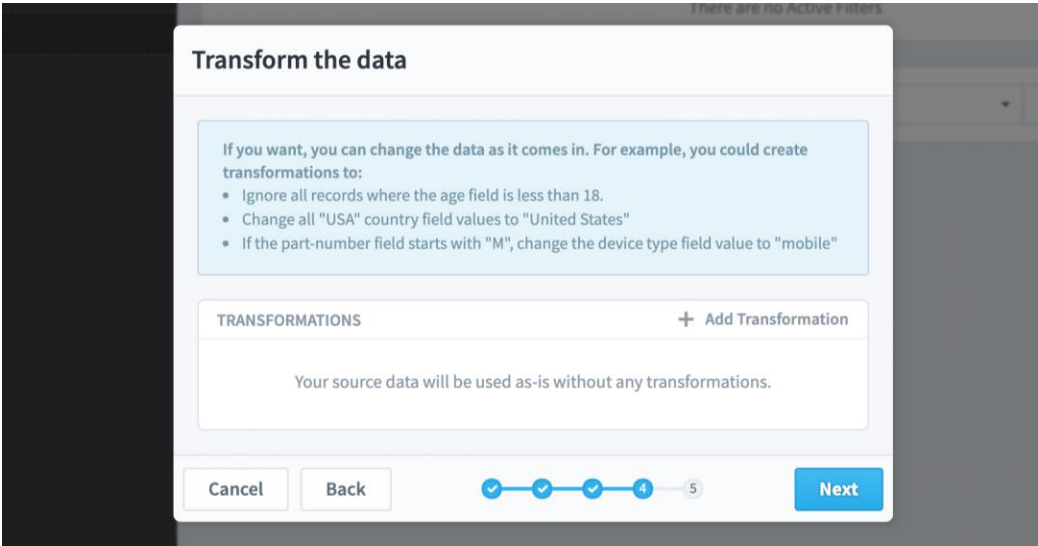


Once the spreadsheet is uploaded, Spider Impact starts to scan and process it. This may take anywhere between a few seconds and many minutes, depending on the size of your data.

When it's done processing, the next step is to choose the header row that contains the column labels. If you're using an Excel file with multiple worksheets, you'll choose which worksheet you want to use on this step too.

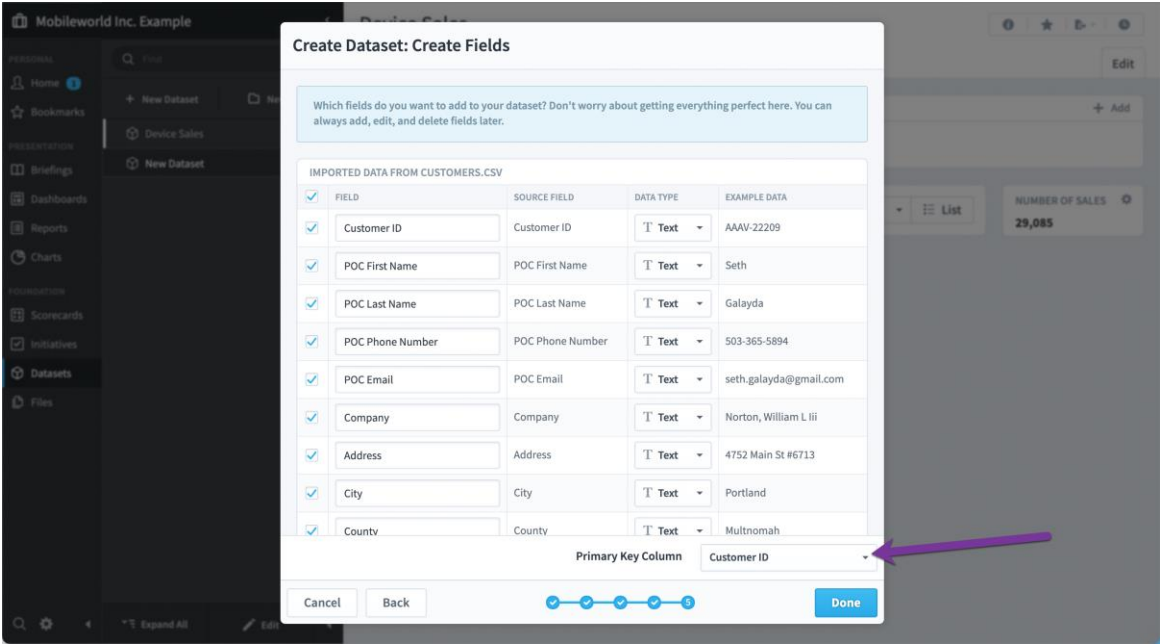


The data transformation step is next, and it allows you to apply powerful transformations to your data as it's imported. You can skip records, combine fields together, or clean dirty data.

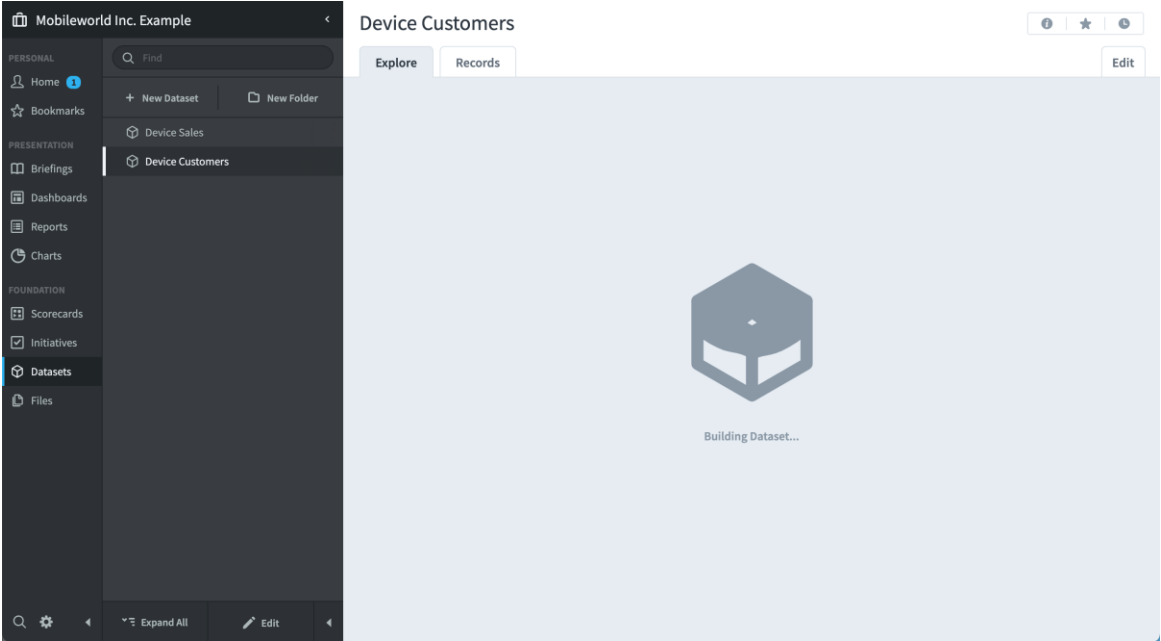


Finally, you choose which fields you want to include in your dataset. This is your first opportunity to choose a better name or data type for each field, but you can always edit fields on the Edit tab later.

In this example we're also setting Customer ID as the primary key, which allows us to update records later as well as link datasets together.

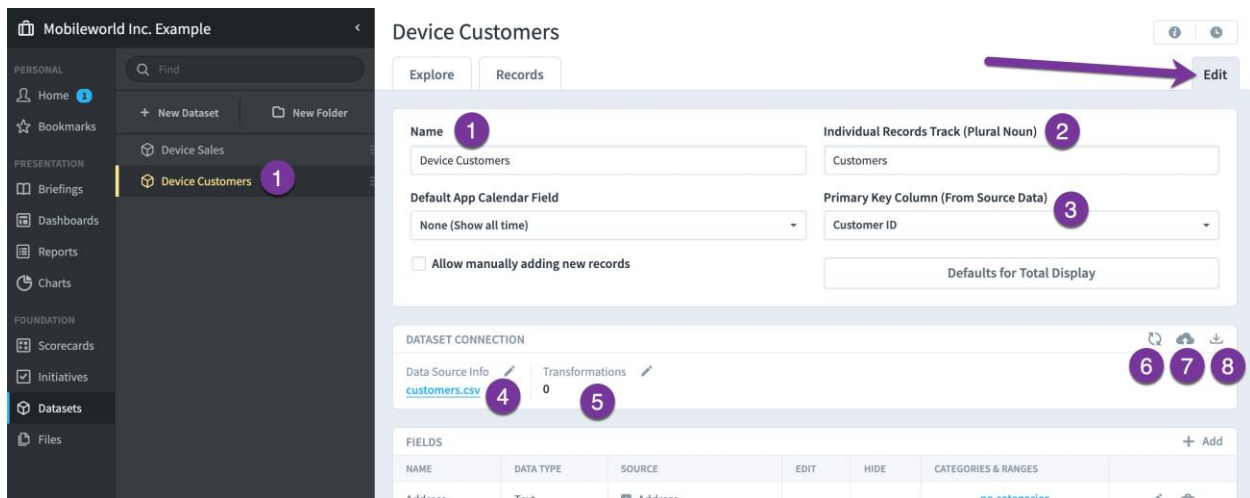


After you click Done it can take several minutes or longer for your dataset to build, depending on the amount of data.

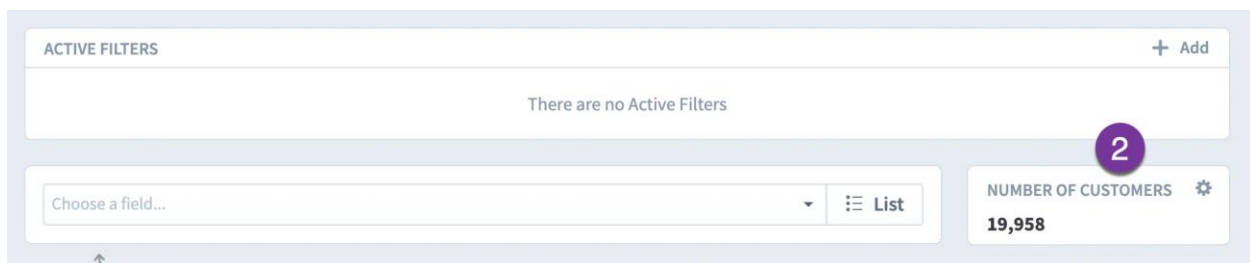


Editing datasets

To edit a dataset, just go to its Edit tab. Here you can modify several things that you set up when initially building the dataset.



1. The dataset name that shows in the navigation pane.
2. Used throughout the app to identify what is stored in the dataset, for example the total box.













3. The primary key field.
4. The data source.
5. Optional data transformations.
6. This rebuilds a dataset with the same data it had before. If you run into a problem, sometimes a rebuild can fix it.
7. Upload a new spreadsheet. For connections to Databases, Google Sheets, and (S)FTP this will be a "Fetch Data" button to pull in the latest data.
8. Download the most recently imported spreadsheet.

Editing fields


You can edit dataset fields on the Edit tab by clicking on their edit buttons.

Device Customers

Explore Records Edit

FIELDS						+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Address	Text	Address			no categories	 
City	Text	City			no categories	 
Company	Text	Company			no categories	 
Country	Text	Country			no categories	 
County	Text	County			no categories	 

Expand



This opens the Edit Field dialog.

nc. Example

Device Customers

Find

+ New Dataset New Folder

Device Sales

Device Customers

Expand All Done

Move Delete

Edit Field

1 Name: City

2 Data Type: Text

3 Type: Basic

4 Column (From Source Data): City

Field Group: Choose or create a Field Group (optional)

Allow This Field's Values To Be Overridden

Hide From Non-Administrators

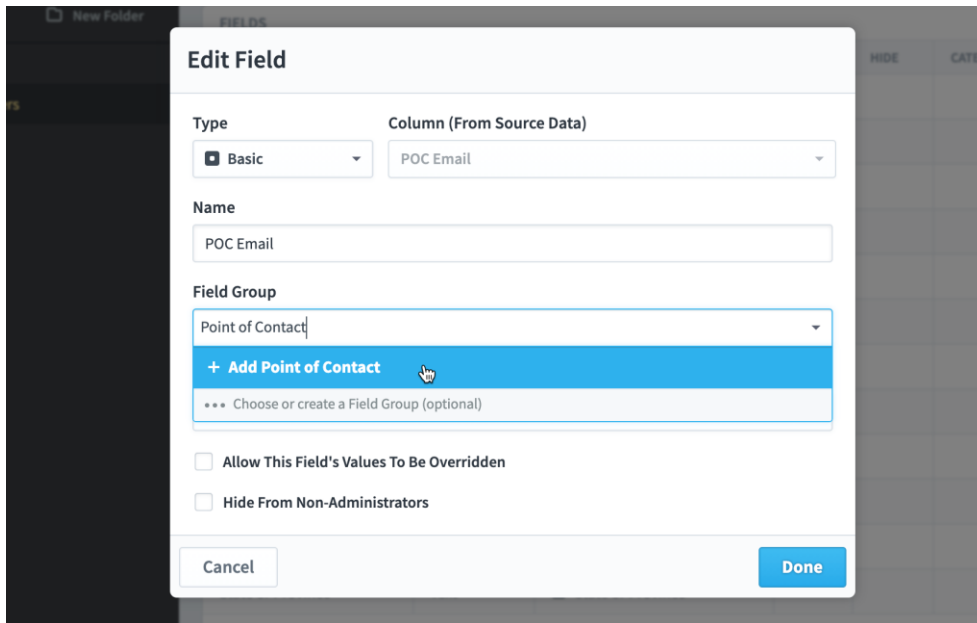
Cancel Done

1. The field name
2. The field's data type, for example Text, Date, Number, Etc.
3. A Basic field is simple, it's just one column of data. You can also create fields that are Calculated or Data Clusters, which are covered below.
4. The column to use for the basic field.

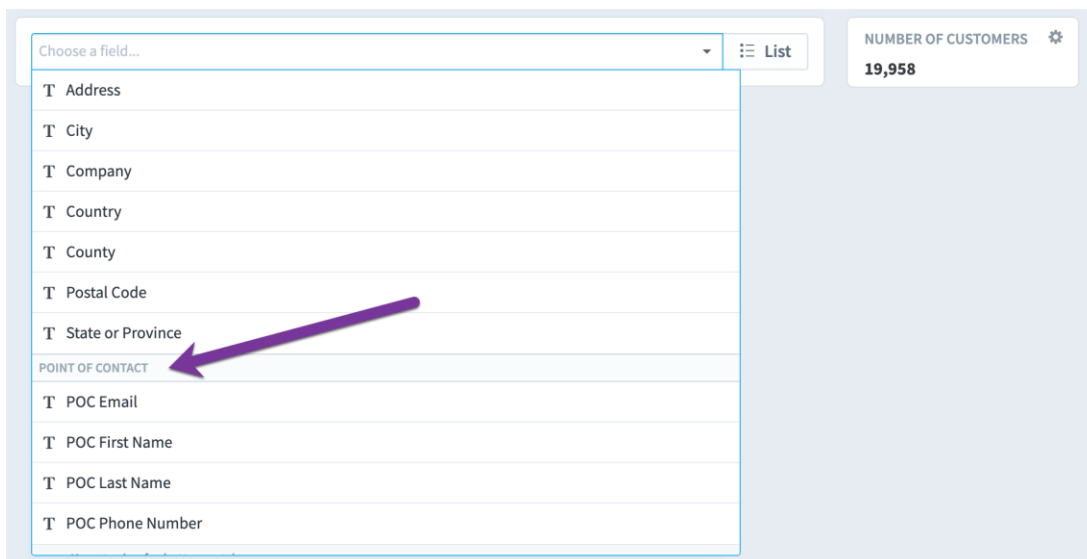
5. Hide From Non-Administrators allows you to prevent a field from showing in Spider Impact. For example, if you're using a private ID number to link multiple datasets together, you could use that field for linking on the Edit tab, but choose to hide that field everywhere else.

Field groups

Field Groups allow you to organize your fields into groups. Here we're creating a "Point of Contact" field group and adding several fields to it.



Now whenever we see a list of fields for this dataset, the Point of Contact fields will be grouped together.

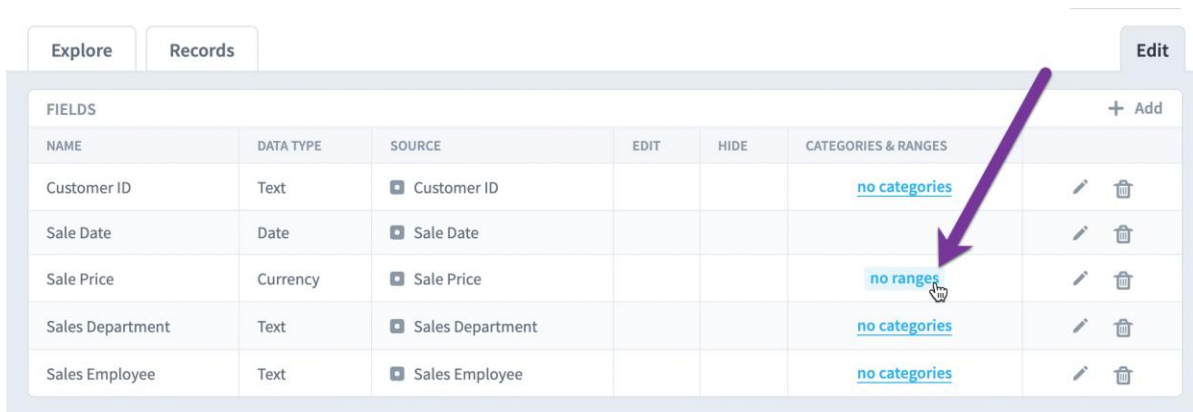












Field categories and ranges

When we add the Sale Price field to the Explore tab, it lists every single unique price in the table. This isn't particularly helpful because the most common sale price of \$411 only appeared on 6 sales.

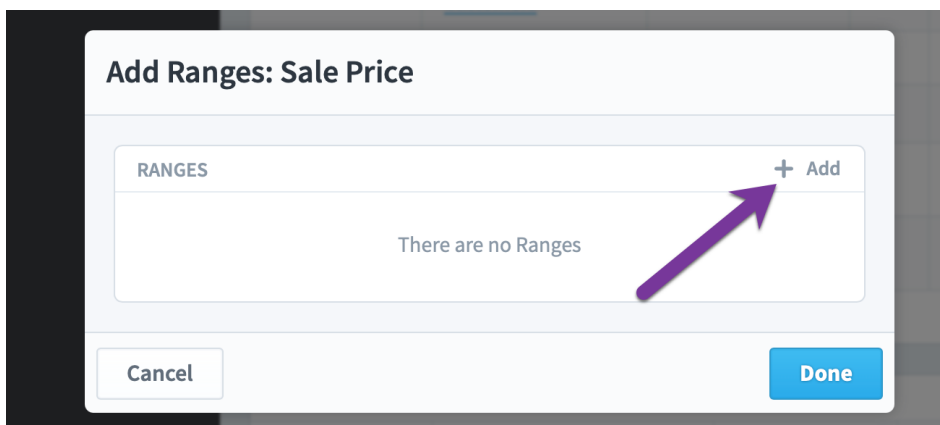
SALE PRICE	NUMBER OF SALES	SALES %
\$411	6	0.02%
\$675	6	0.02%
\$683	6	0.02%
\$702	6	0.02%
\$377	5	0.02%
Other (Show 5 More)	29.1K	99.9%

To fix this, let's visit the dataset's Edit tab, scroll down to the Fields table, and click on the Sale Price field's Ranges button.



NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Customer ID	Text	Customer ID			no categories	 
Sale Date	Date	Sale Date				 
Sale Price	Currency	Sale Price			no ranges	 
Sales Department	Text	Sales Department			no categories	 
Sales Employee	Text	Sales Employee			no categories	 

To add a range, click on the add button in the corner.



Add Ranges: Sale Price

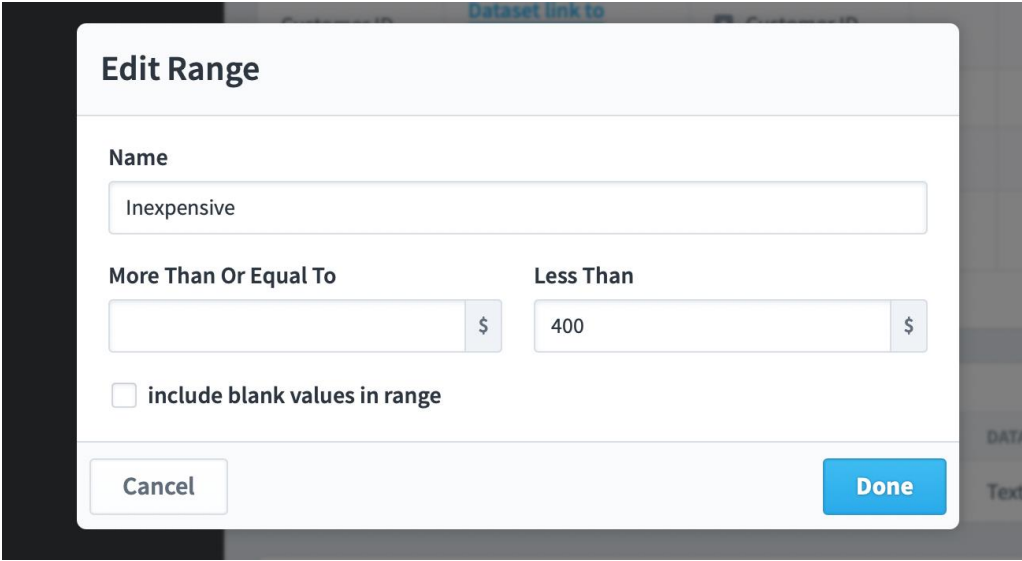
RANGES

There are no Ranges

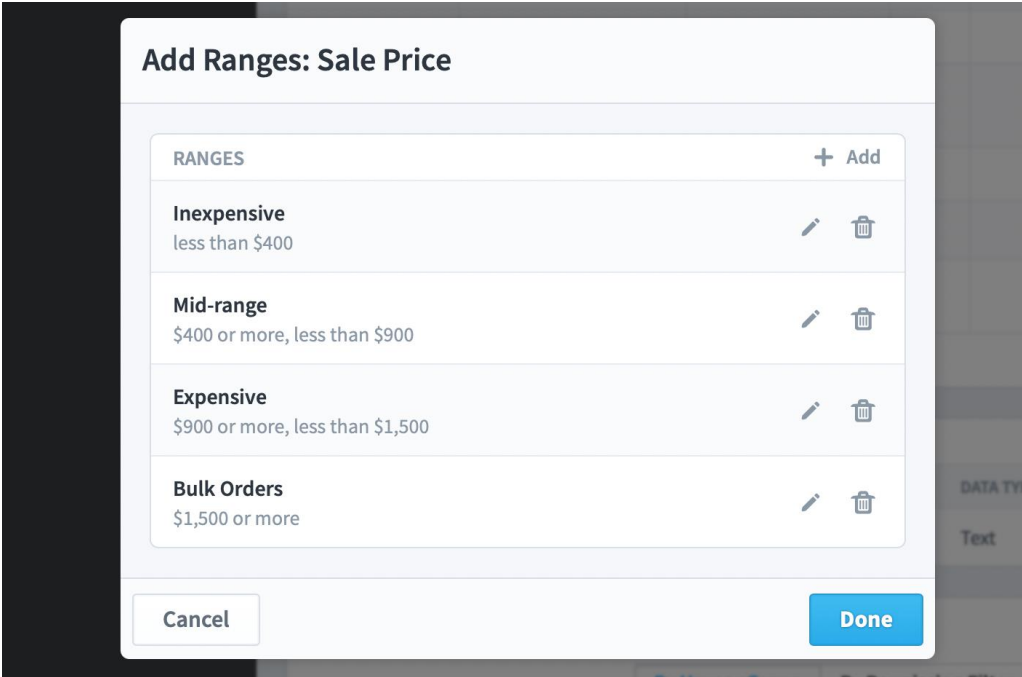
[+ Add](#)

Cancel Done

Then we'll create our first range. In this example, the "inexpensive" range is anything less than \$400.



Then we'll add three more ranges.



Now when we explore Sales Price, it defaults to showing the four ranges we created. This is much more usable information.

SALE PRICE ⚙️ 🗑️		
SALE PRICE	NUMBER OF SALES	SALES %
Inexpensive	2,611	8.98%
Mid-range	24.5K	84.35%
Expensive	1,339	4.6%
Bulk Orders	603	2.07%

At any point you can switch back to showing every sales price.

SALE PRICE ⚙️ 🗑️		
SALE PRICE	NUMBER OF SALES	
Inexpensive	2,611	
Mid-range	24.5K	
Expensive	1,339	
Bulk Orders	603	

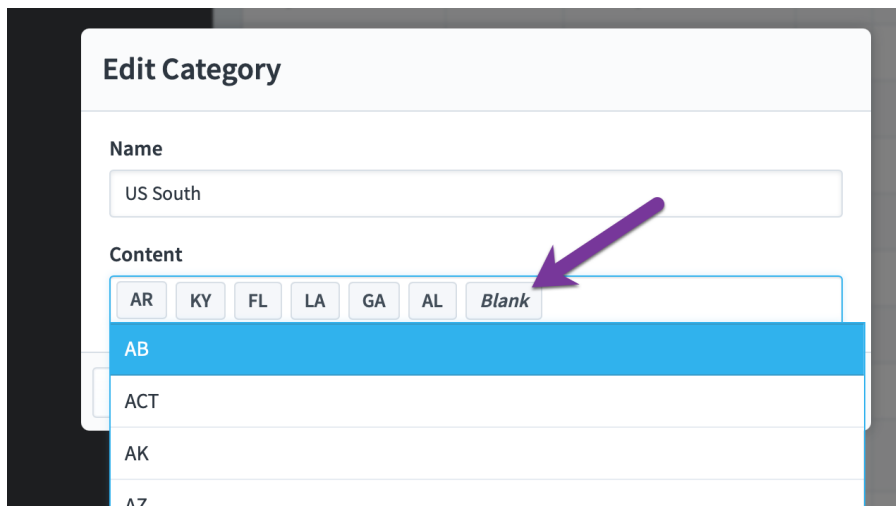
< Choose rows

- Every Sale Price
- Every Sale Price Range
- Sum Everything
- Average Everything
- Minimum
- Maximum
- Number Of Unique

Fields with data types like Text have categories instead of ranges.

POC Phone Number	Text	<input type="checkbox"/> POC Phone Number	no categories	✎ 🗑️
Postal Code	Text	<input type="checkbox"/> Postal Code	no categories	✎ 🗑️
State or Province	Text	<input type="checkbox"/> State or Province	no categories	✎ 🗑️

The idea is the same, but you choose specific values for every category. Note how in this category we've also included blank values.



Dataset field & filter equations

Calculated dataset fields

You can build dataset fields that are calculations based on other dataset fields. This includes fields in other datasets. To do this, we'll click the "Add" button in the Fields panel on the Datasets Edit tab.



This opens the Add Field dialog. We'll choose Calculated for the type and we'll click "Set Equation".

Add Field

Type Calculated **Equation** Set Equation

Name
Customer Name

Field Group
Choose or create a Field Group (optional)

Data Type
Text

Allow This Field's Values To Be Overridden

Hide From Non-Administrators

Cancel Done

Now we can build the field's equation by choosing dataset fields on the bottom, clicking the "add" button to add them to the equation panel above, and by typing text directly in the equation panel.

Add Field

Equation
if([Company] != "", [Company] , [POC First Name] + " " + [POC Last Name])

ALLOWED INPUT: +-*/()

CHOOSE SOURCE FIELD OR COLUMN

Dataset Customers **Column (From Source Data)** POC Last Name Add

Cancel Done

In this example, we've got a Customers dataset and we're building a calculated field to track the customer's name. The equation says to use the "Company" field for the customer name if it's not empty. If there's no company specified, use a combination of the point of contact first and last names.

```
if([Company] != "", [Company], [POC First Name] + " " + [POC Last Name])
```

Once we build the calculated field, it is listed with all of our other fields in the Fields panel.

NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Address	Text	Address			no categories	
City	Text	City			no categories	
Company	Text	Company			no categories	
Country	Text	Country			no categories	
County	Text	County			no categories	
Customer ID	Text	Customer ID			no categories	
Customer Name	Text	if([Company] != "", [Company], [POC First Name] + " " + [POC Last Name])			no categories	
Postal Code	Text	Postal Code			no categories	

Here's our new customer name field on the Records tab.

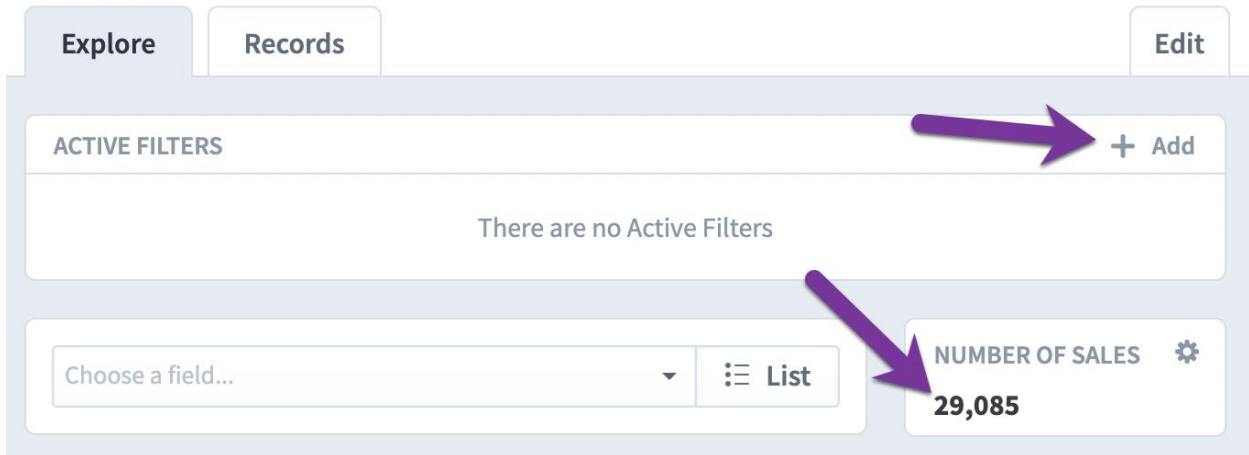
ADDRESS	CITY	COMPANY	COUNTRY	COUNTY	CUSTOMER ID	CUSTOMER NAME	POC EMAIL	POC FIRS NAME
4752 Main St #6713	Portland		United States	Multnomah	AAAV-22209	Seth Galayda	seth.galayda@gmail.com	Seth
3556 S 21st St	Ocala		United States	Marion	AABI-37357	Randy Ferko	randy@aol.com	Randy
6278 Pali Momi St #3	San Leandro		United States	Alameda	AACE-49383	Nieves Denegre	nieves.denegre@cox.net	Nieves
32 N Trimble	Maple		United	Cushara	AACG-	Ema	ema.coadey@roadway.com	Ema

For information about all of the functionality that equations support, see the Equations article in the knowledge base.

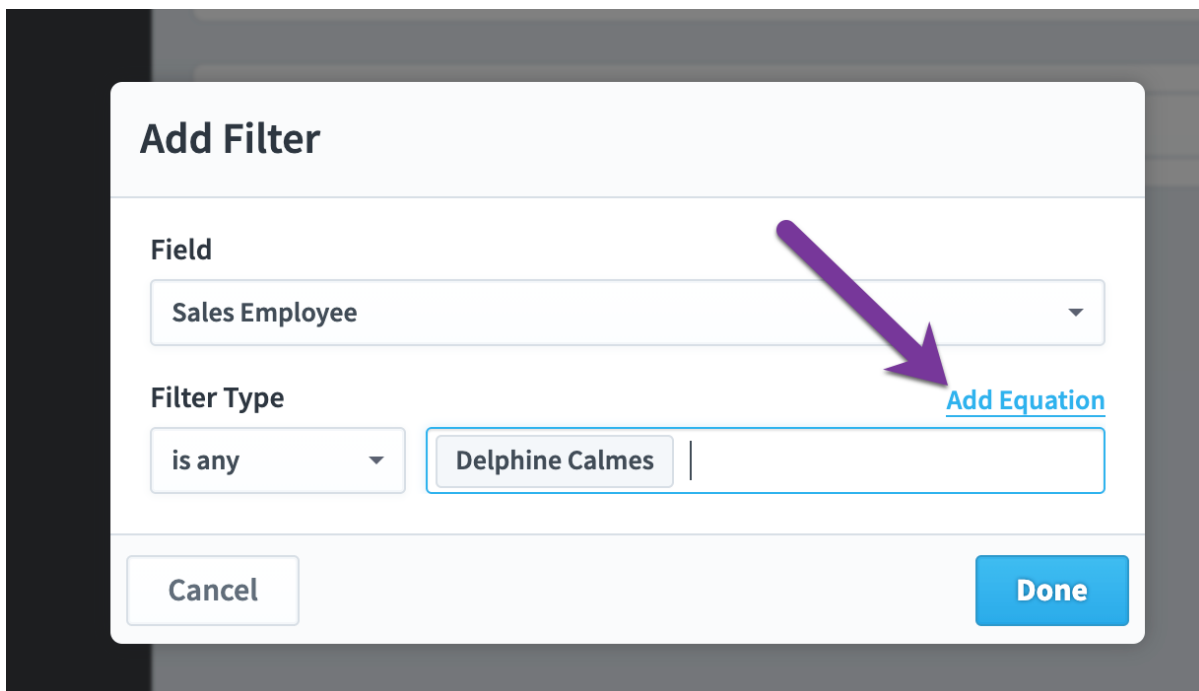
<https://support.spiderstrategies.com/hc/en-us/articles/4407643362452-Equations>

Filter equations

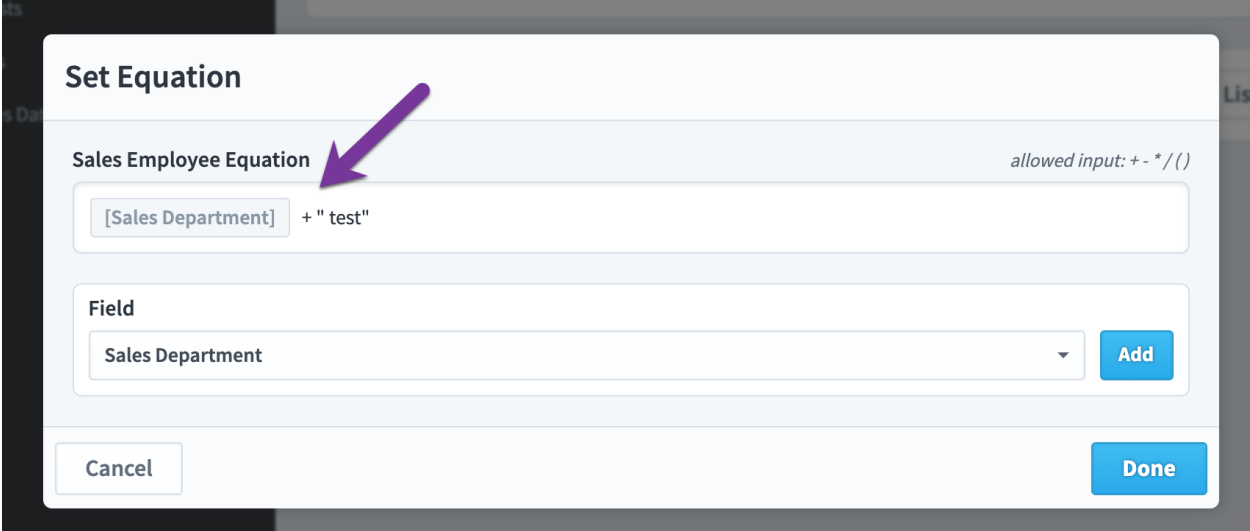
Dataset filters are used throughout Impact. For example, here we're on the Datasets Explore tab seeing all 29,085 total records. We'll add a filter by clicking on the "add" button in the Active Filters panel.



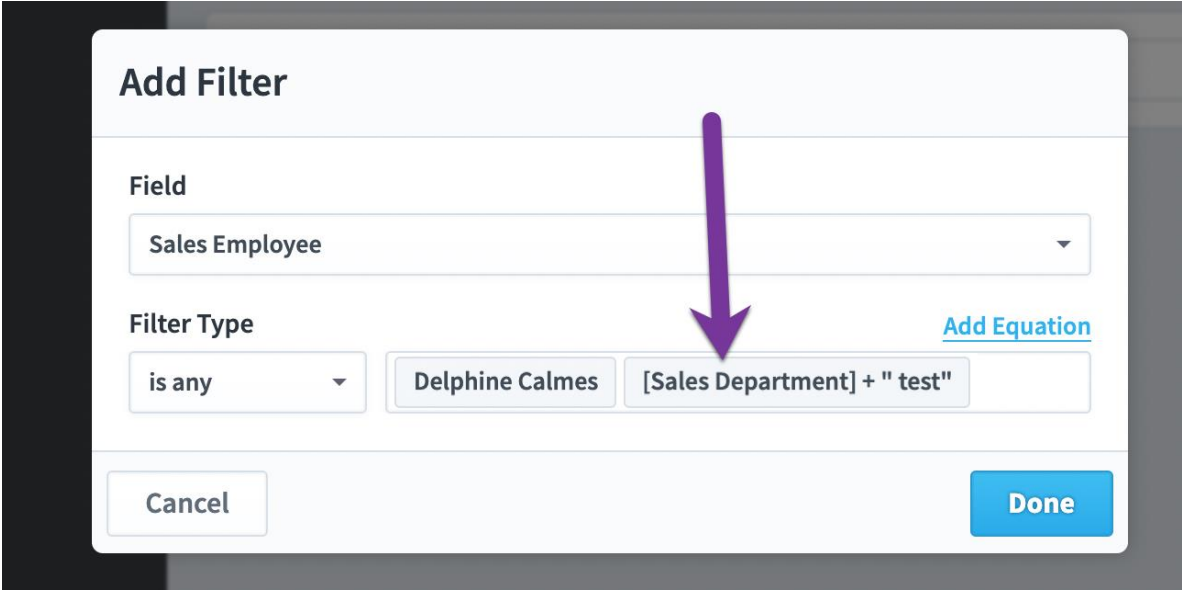
The "is any" filter allows you to choose specific field values. In this example we're showing records where the Sales Employee is "Delphine Calmes". You can also click the "add equation" button.



This opens a dialog where you can build an equation to match field values against. In this nonsense example, we're matching records where the sales employee field matches the sales department field with " test" added to the end.



Here's what our filter looks like when we're done.



You can write equations against more than just text. In this example we're adding an "after" filter to the Sale Date field.

Add Filter

Field
Sale Date

Filter Type
after...

Cancel 1 — 2 Next

On the next step of the wizard we'll change the date to calculated and click the Set Equation button.

Add Filter: Sale Date

CHOOSE BY Calendar Period **Date**

DATE Set Equation

Cancel Back ✓ — 2 Done

We can build an equation to compare the Sale Date against another date field, but instead we're going match all dates in the past year.

Set Equation

Sale Date Equation allowed input: +-*/()
subtract(today(), 1, "years")

Field
Choose a field... Add

Cancel Done

Here's our new filter in action, showing only 6,595 matching records.

The screenshot shows a filter interface. At the top, there is a section labeled 'ACTIVE FILTERS' with a '+ Add' button. Below this, a filter is applied: 'Sale Date: after subtract(today(), 1, "years")'. A purple arrow points to this filter. Below the filter, there is a dropdown menu labeled 'Choose a field...' and a 'List' button. A purple arrow points to the 'NUMBER OF SALES' summary card, which displays '6,595'. At the bottom, there is a prompt: 'Choose a field to explore or filter!' with a curved arrow pointing to the dropdown menu.

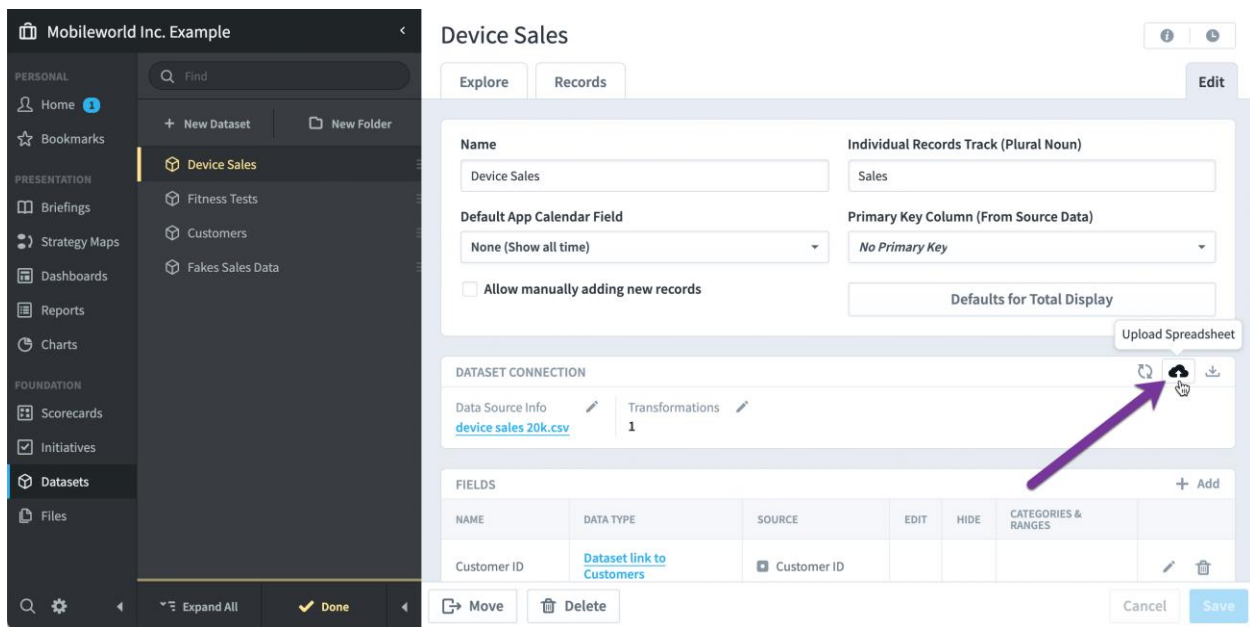
Updating datasets

Manually importing

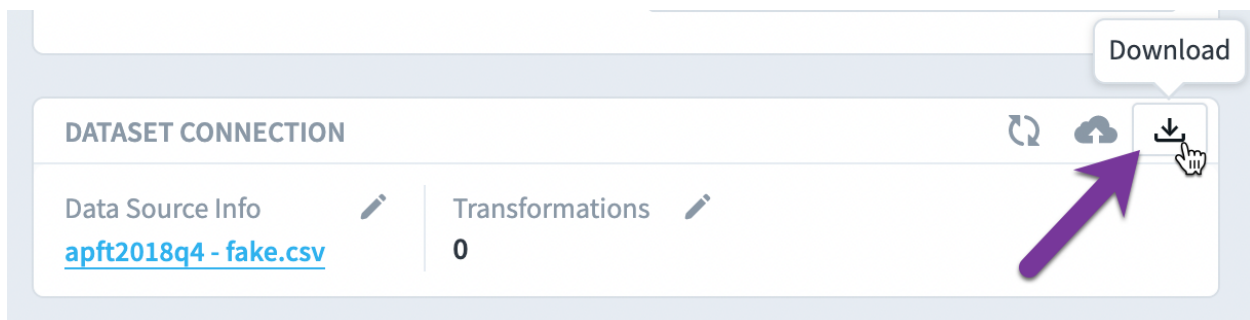
If you've created one or more datasets from a spreadsheet in the Files section, it will list those datasets on the file's Overview tab. Whenever you upload a new revision to that file in the Files section, Impact will automatically update the data in the corresponding datasets.

The screenshot shows a file overview page for 'Physical Fitness Tests Spreadsheet'. The page has a dark sidebar on the left with a navigation menu. The main content area is titled 'Physical Fitness Tests Spreadsheet' and has an 'Overview' tab selected. The overview shows a 'Download (30.54 MB)' button, a 'Drop a New Revision Here' area, and a 'REVISIONS' table with one entry: 'Apft2018Q4 - fake.csv'. On the right side, there is a 'RELATED ITEMS' section with '+ Add' and 'No related items', and a 'DATASETS' section with one entry: 'Fitness Tests from Files'. A purple arrow points to this dataset entry.

If a dataset was built by directly uploading a spreadsheet, you can update the dataset by uploading a new version of the spreadsheet on the Dataset Edit tab.



You can download a copy of the dataset's most recently uploaded spreadsheet there too.

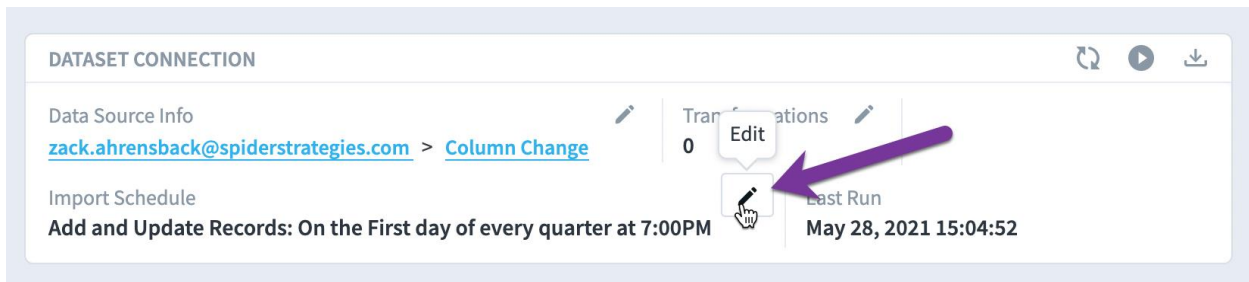


Scheduled imports

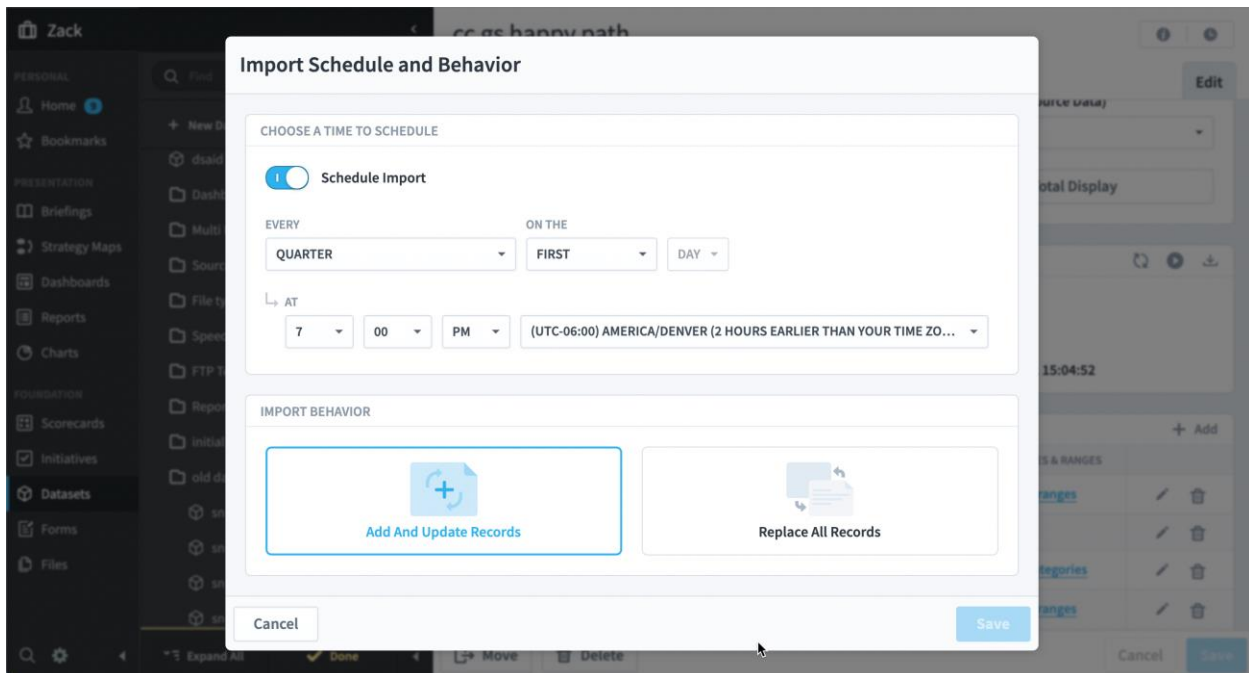
You can schedule imports for datasets that are built from databases, Google Sheets, or (S)FTP spreadsheets. See the [Managing Imports and Connections](#) knowledge base article for more information.

<https://support.spiderstrategies.com/hc/en-us/articles/360041568531-Managing-Imports-and-Connections>

To set or modify an import schedule, you can go to either the Administration > Imports screen or the Datasets Edit tab. Here we're clicking the edit button for a scheduled import.

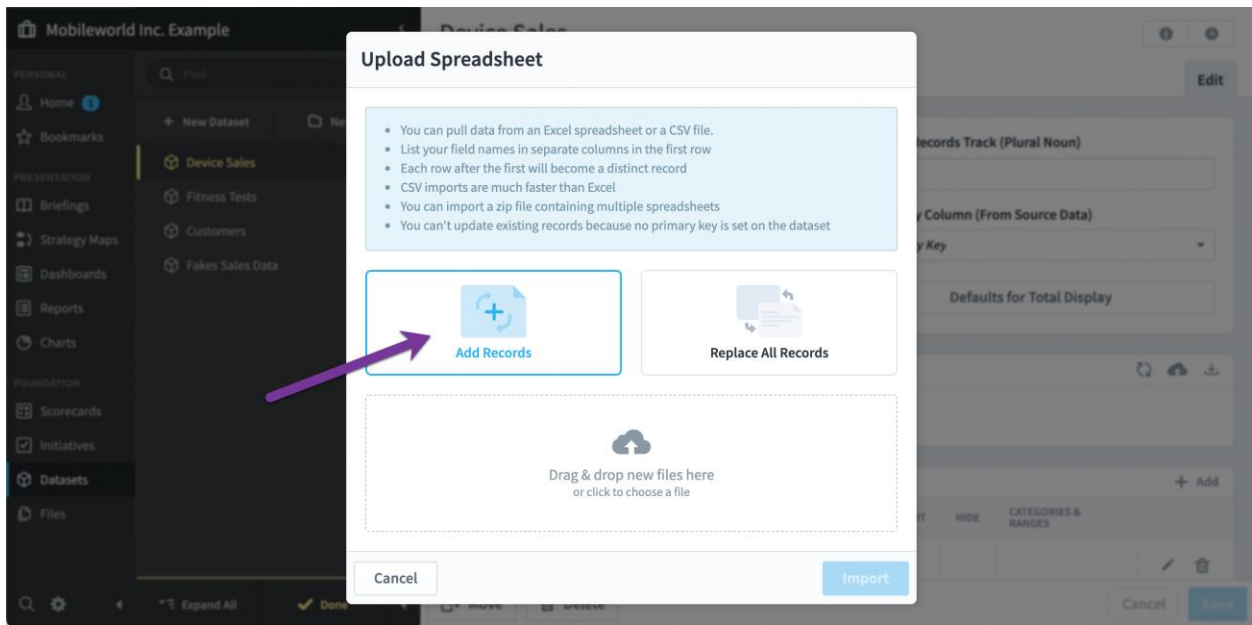


In this example we're importing from Google Sheets on the first day of every quarter at 7:00 PM.

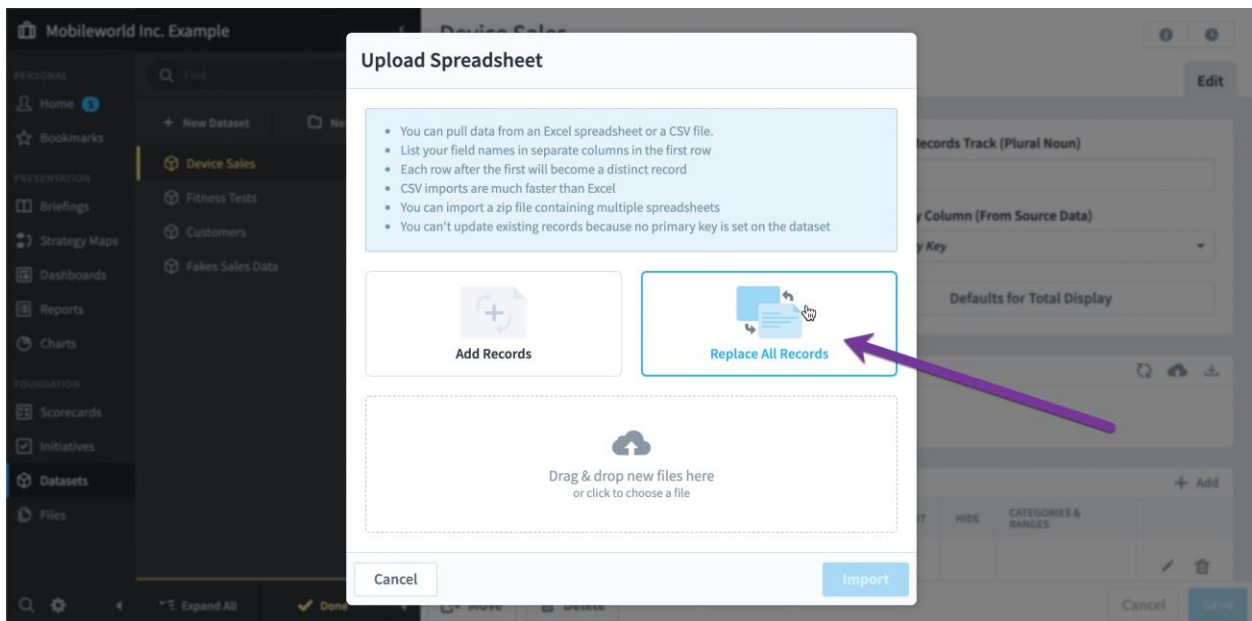


Add records vs. replace all records

The default behavior when importing new dataset data is to keep the existing records and add new ones. If your dataset has a primary key and a new record's key matches an existing record, the old record will be replaced. The "Add Records" option is used when the data you're importing represents transactions rather than all source data.



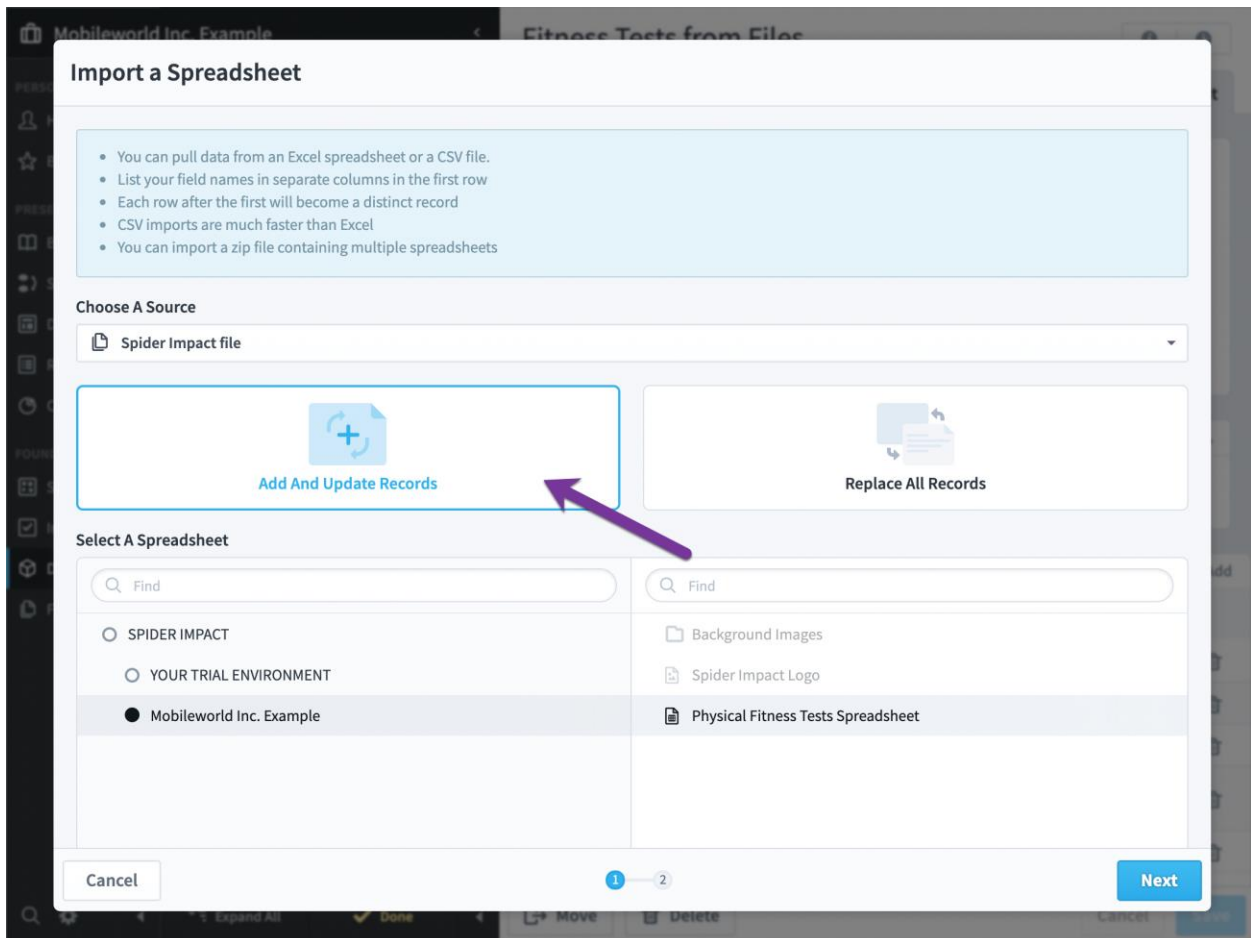
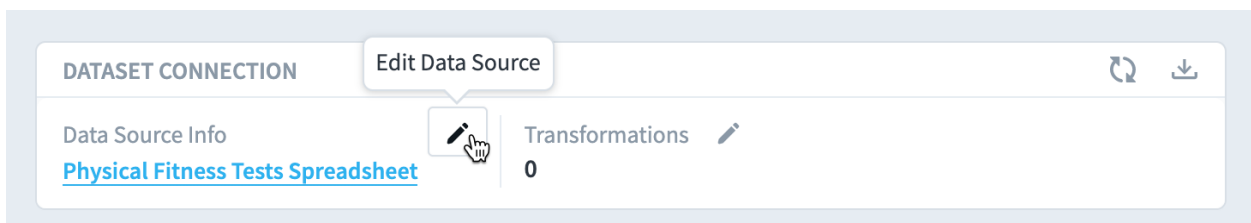
You can also choose to replace all records, which is used when the data you're importing represents all of the data from the system of record. All existing records will be removed, and all new records will be added. This is actually the most common option, but it does mean you lose your old data, so it's not the default.



If you accidentally add records instead of replacing them, don't worry. You'll notice the problem because you'll have more records than expected. All you need to do is re-import the data and choose "Replace All Records".

It's also important to note that regardless of whether you're adding or replacing all records, any custom changes you've made to data on the Records tab will not be replaced. New records that you've created, and any overrides you've done, will be mixed in with your newly imported data. See the *Manually Adding and Updating Records* section below for more info.

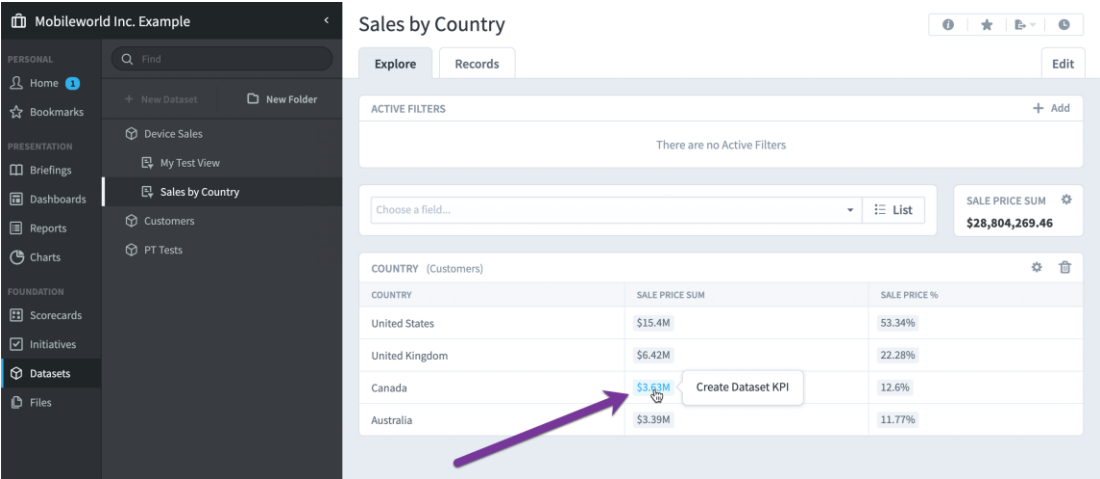
There are multiple ways to get to the import behavior choice. As shown above, you'll see it whenever editing an import's schedule. You'll also see it whenever you manually upload a file. Finally, you'll see it whenever editing the dataset's data source.



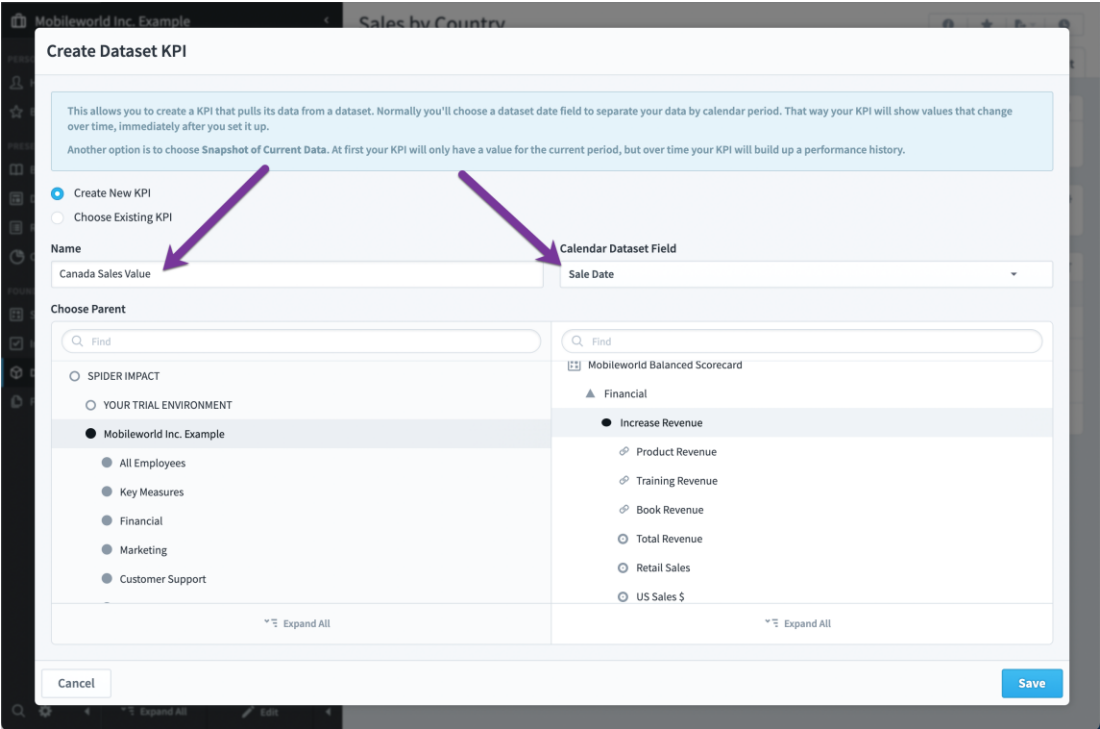
Dataset KPIs

Creating a dataset KPI

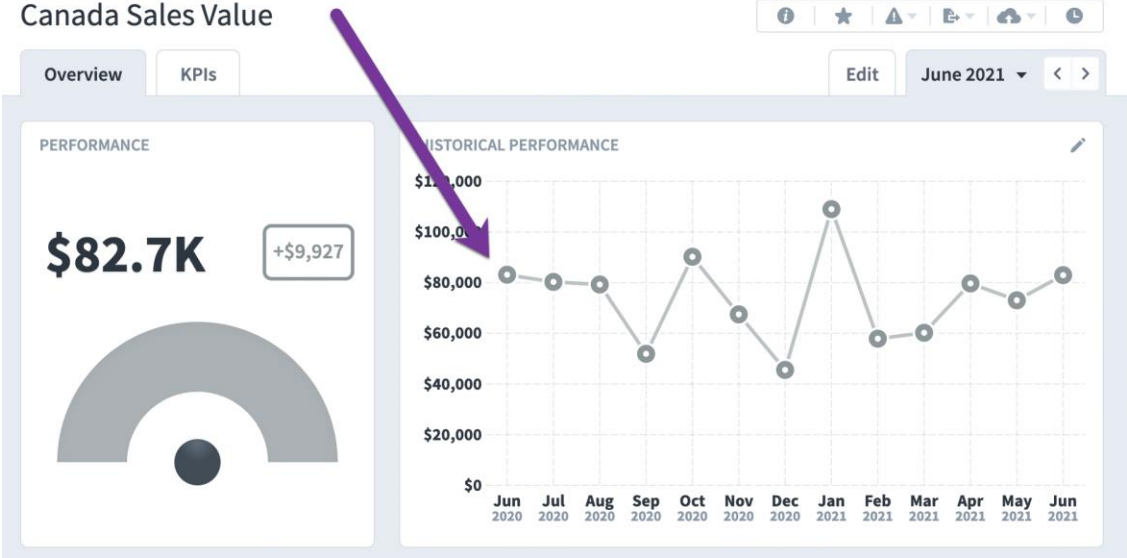
To create a KPI from dataset data, click on any number on the Datasets Explore tab, and then click the "Create Dataset KPI" link. In this example we'll click on the \$3.6M of total Canadian sales.



Here you can choose to create a new KPI or add data to an existing KPI. We'll choose to create a new KPI and we'll name it "Canada Sales Value". We'll also choose the Sale Date for the calendar field, and we'll find a good place for the new KPI to go.



After saving the new KPI, it looks like this. The \$3.6M in total Canada sales has been broken into months using the Sale Date field. In a few clicks we've created a KPI with data going back years. Even better, whenever the dataset is updated with new data, the KPI will automatically update.

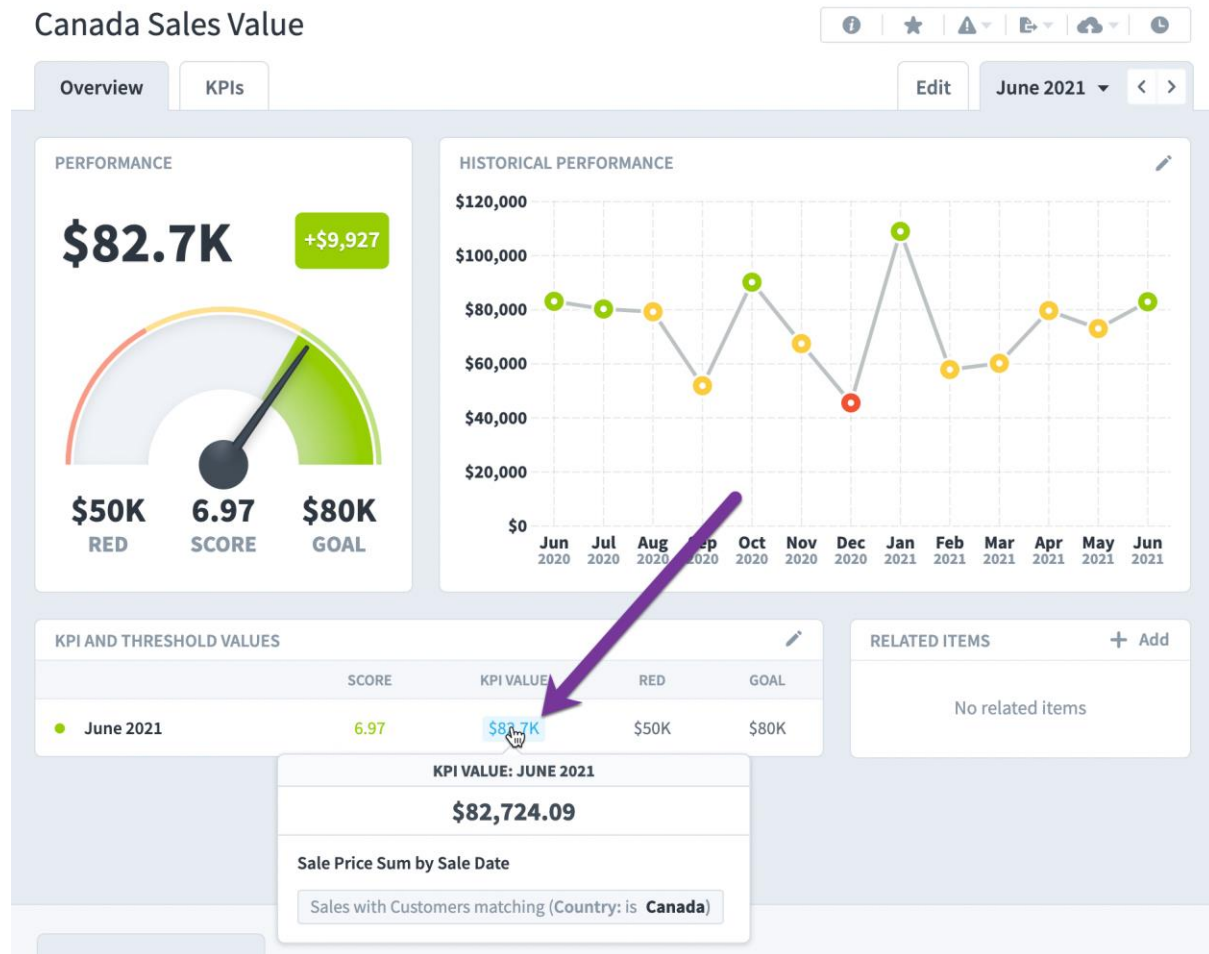


This dataset KPI is just like any other KPI, and we can give it thresholds if we want.

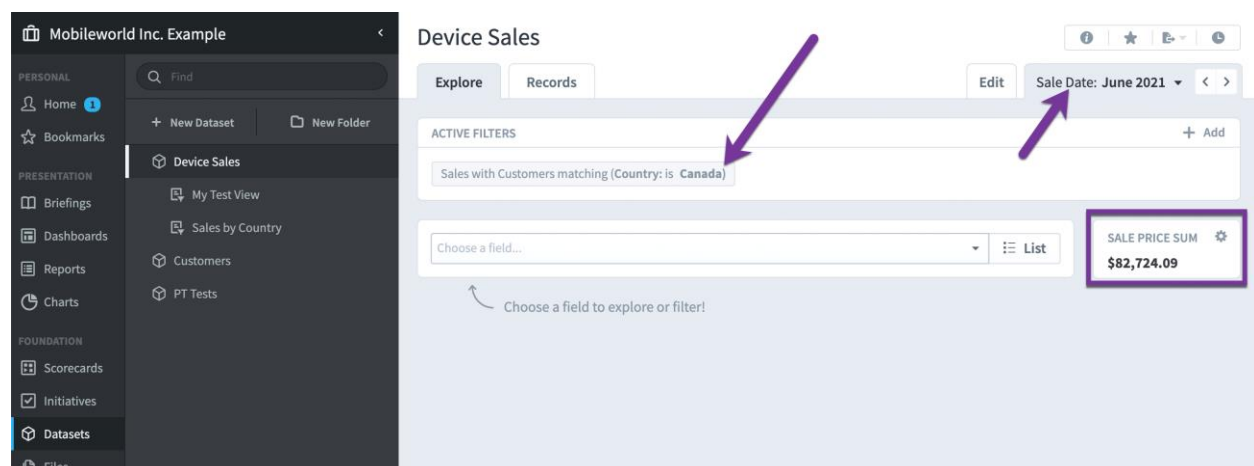
The screenshot shows the configuration page for the 'Canada Sales Value' KPI. It is divided into two main sections: 'KPI DETAILS' and 'FIELDS'. In the 'KPI DETAILS' section, the 'Scoring Type' is set to 'Goal/Red Flag', 'Calendar' is 'Monthly', and 'Data Type' is 'Currency'. The 'Aggregation Type' is 'Sum', 'Decimal Precision' is 'Default Decimal Precision', and 'Currency' is 'Default'. In the 'FIELDS' section, the 'KPI Value' is 'Dataset', 'Red Flag' is 'Manual' with a threshold of 50000, and 'Goal' is 'Manual' with a threshold of 80000. Purple arrows point to the 'Scoring Type' dropdown, the 'Red Flag' threshold input, and the 'Goal' threshold input.

Field	Value
Scoring Type	Goal/Red Flag
Calendar	Monthly
Data Type	Currency
Aggregation Type	Sum
Decimal Precision	Default Decimal Precision
Currency	Default
KPI Value	Dataset
Treat missing values as Blank	
Sale Price Sum by Sale Date	View
Change Existing KPI Updates	<input type="checkbox"/>
Red Flag	Manual (50000)
Goal	Manual (80000)

Now our KPI has colors, and we can create performance alerts. When you hover over the KPI value, you can see exactly where the data comes from.



If you click on the KPI value on the Scorecards Overview, you drill down to the Datasets Explore tab for further exploration. Here we have the "Country = Canada" filter automatically applied, with the date set to "June 2021".



Snapshot dataset KPIs

Let's create another dataset KPI.

COUNTRY (Customers)		
COUNTRY	SALE PRICE SUM	SALE PRICE %
United States	\$15.4M	53.34%
United Kingdom	\$6.42M	22.28%
Canada	\$3.63M	12.6%
Australia	\$3.39M	11.77%

In the previous example we chose Sale Date for the calendar field, but this time we're not going to choose any date field. Instead, we're going to make a new snapshot KPI.

Create Dataset KPI

This allows you to create a KPI that pulls its data from a dataset. Normally you'll choose a dataset date field to separate your data by calendar period. That way your KPI will show values that change over time, immediately after you set it up.

Another option is to choose **Snapshot of Current Data**. At first your KPI will only have a value for the current period, but over time your KPI will build up a performance history.

Create New KPI
 Choose Existing KPI

Name
Canada Sales Value (running total)

Calendar Dataset Field
None: Snapshot of Current Data

Calendar
Monthly

Choose Parent

Find

- SPIDER IMPACT
- YOUR TRIAL ENVIRONMENT
- Mobileworld Inc. Example**
 - Key Measures
 - Financial
 - Marketing
 - Customer Support
 - Sales

Expand All

Find

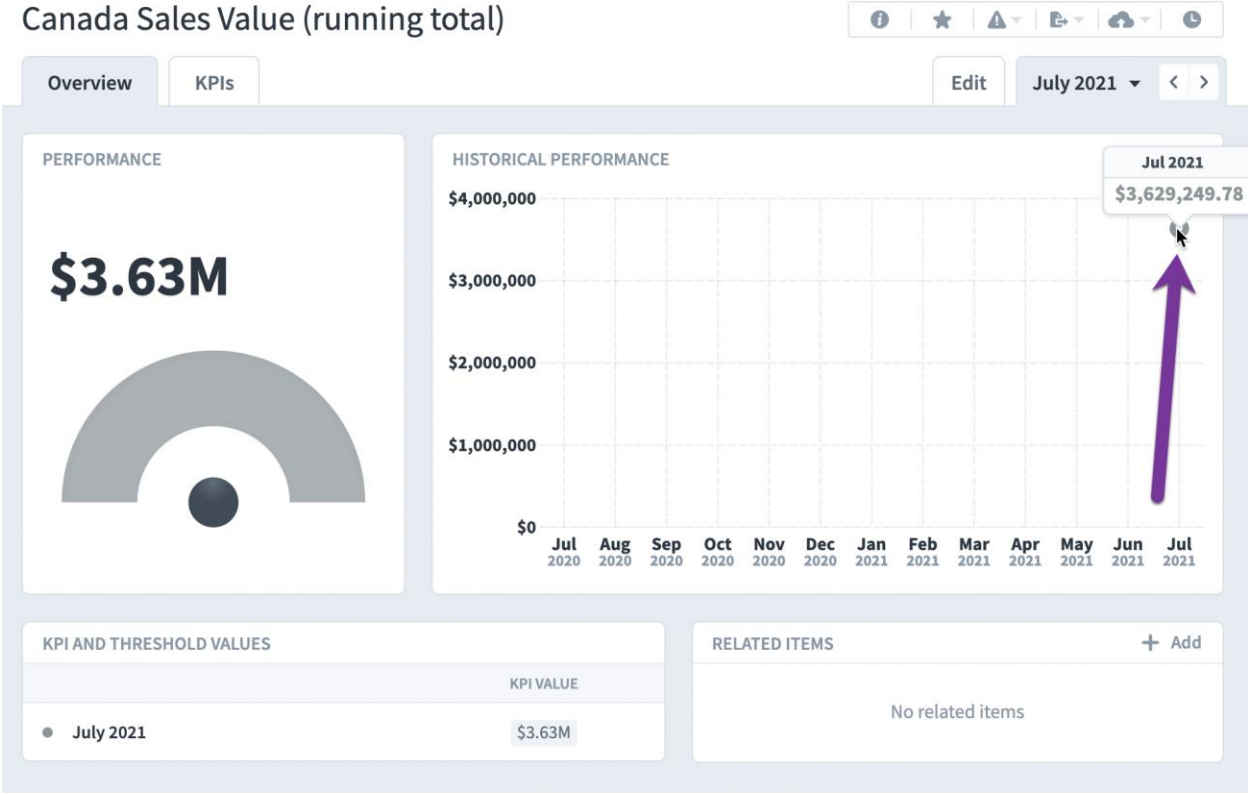
- Mobileworld Balanced Scorecard
 - Financial
 - Customer
 - Internal Processes
 - Organizational Capacity

Expand All

Cancel Save

Rather than spreading the \$3.6M over time, it saves the entire value in the current month of July 2021. Then, at the beginning of the next month, Spider

Impact will save whatever the total is at that time for August 2021. Over time the KPI will build a performance history.



Snapshot KPIs are often used when the data source doesn't contain historical data. For example, we may have an HR system that only contains information about our current employees. If we had a "Number of Employees" KPI, we'd create a snapshot that updates based on the total employees in our HR system.

Spider Impact manages all snapshot KPIs for you, but if you're curious, here's how the process works.

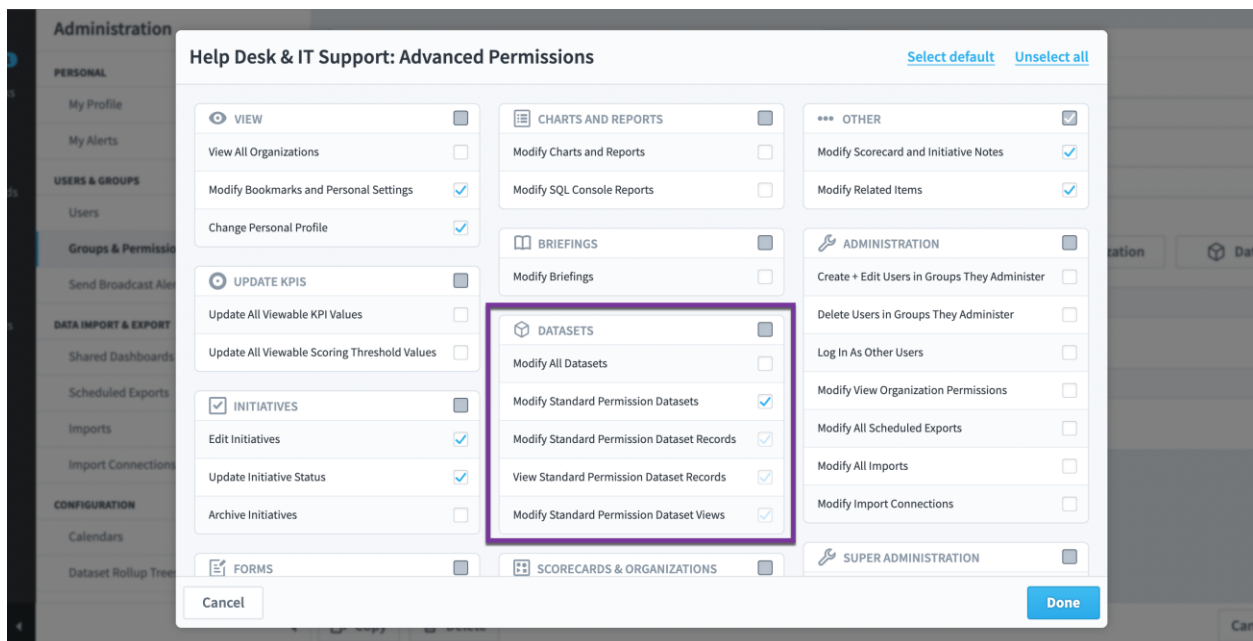
Every day, early in the morning, Impact looks to see if a new calendar period started. If so, it will create a new snapshot value. For example, if it's the first day of the month, all monthly KPIs will get new snapshot values. Whenever the dataset is updated with new data, it will also immediately update the current period for all of its dataset KPIs. Finally, when an administrator manually rebuilds the dataset, the snapshot KPI values for the current period are replaced.

It's important to note that Impact updates the data in the current period, not the previous period. By default, however, Impact shows the previous period when you log in. That means you'll often have to move one period forward to see the latest snapshot values.

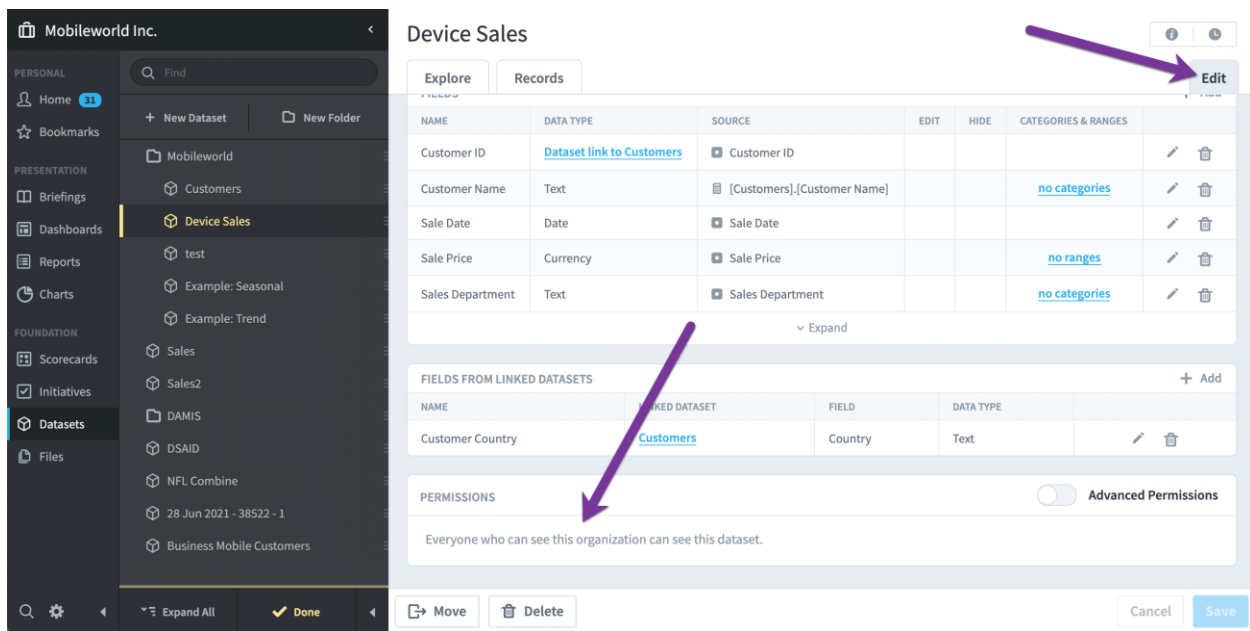
Dataset permissions

Standard dataset permissions

Standard datasets permissions are the same as permissions in every other section in Spider Impact. Administrators give dataset permissions to a group, and then give that group permission to view organizations. If someone is in a group that can see an organization, they can see its datasets. If someone is in a group with the "Modify Standard Permission Datasets" permission and that group can see the organization, that user will be able to modify all datasets with standard permissions in that organization.



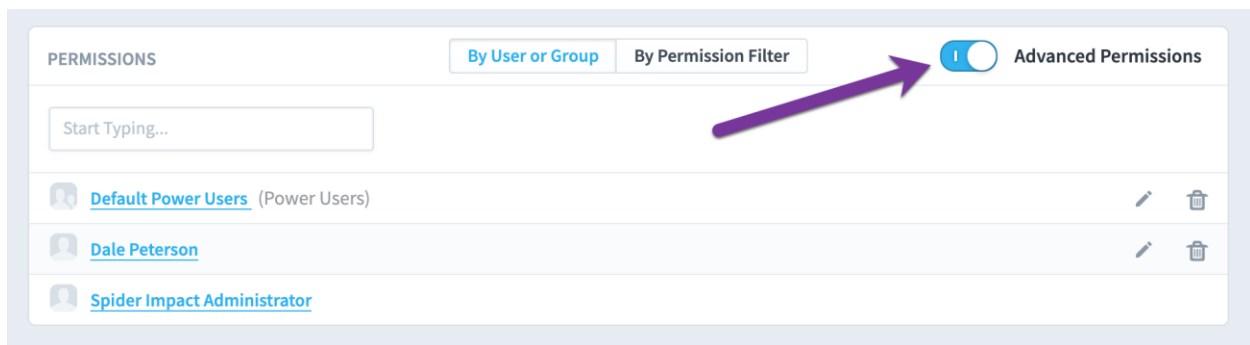
When you create a dataset, it defaults to using standard permissions. As you can see on the Datasets Edit tab, "everyone who can see this organization can see this dataset".



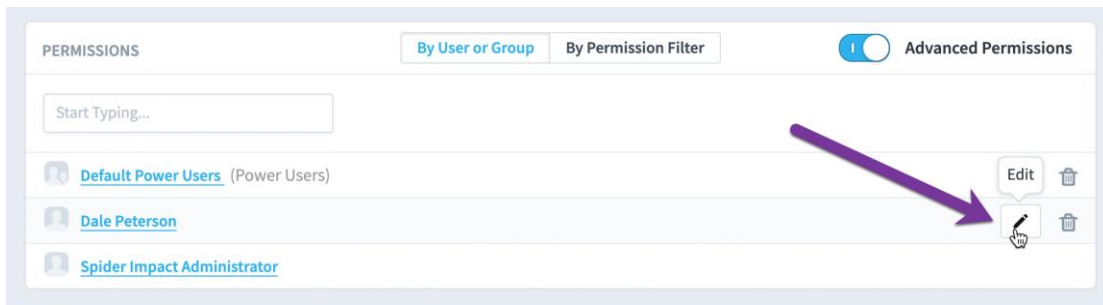
Advanced dataset permissions

There are times, however, when you don't want people to see all of a dataset's records. For example, you may want to allow everyone who can see the organization to only be able to see records where the "Restricted" field value is "False". Or you may want to limit a user to only see a subset of the records based on a "Region" field.

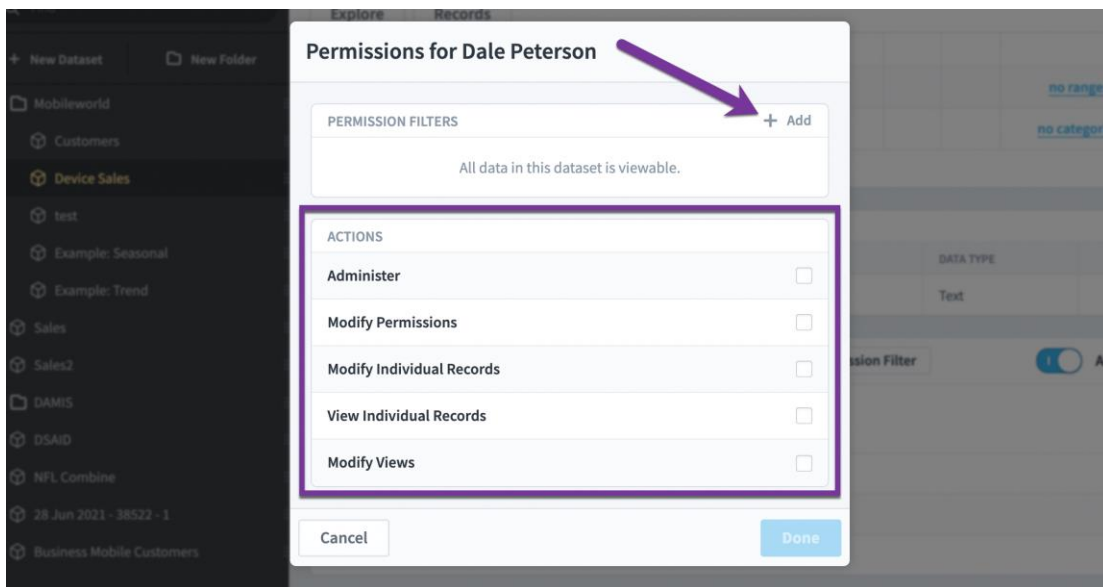
For these datasets you can turn on Advanced permissions. When advanced permissions is on, only the users and groups who have been given explicit permission to the dataset can see it.



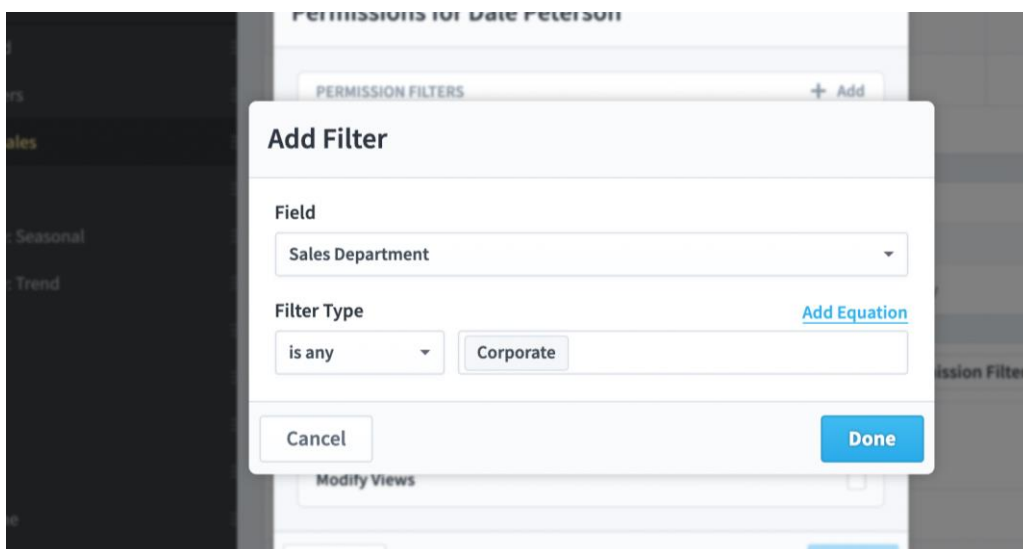
The users and groups that you add in the Permissions panel will be able to see all records by default, and they will only be able to view data. You can click on the Edit button to change this.



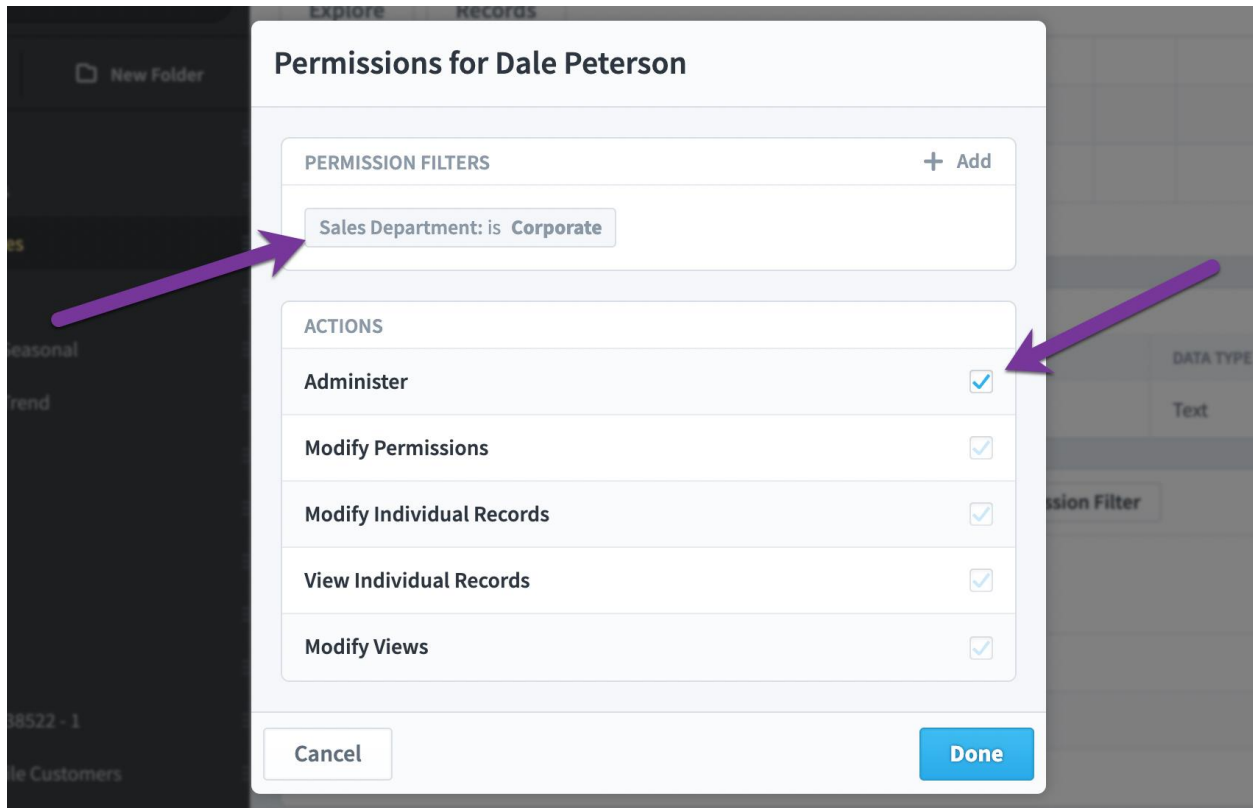
Here we can give the user any of the permissions in the purple box, and they only apply to this dataset. You can also add a permissions filter by clicking the add button in the permission filters panel.



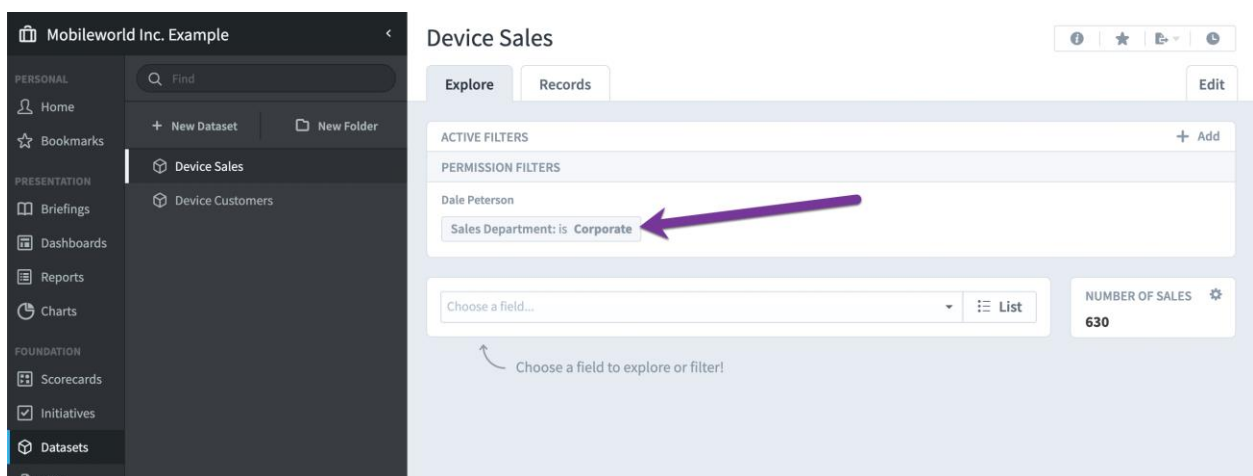
We're going to add a filter for Sales Department = "Corporate".



When we're done, the dialog looks like this. Dale Peterson can administer the dataset, but he can only see records where sales department is corporate.



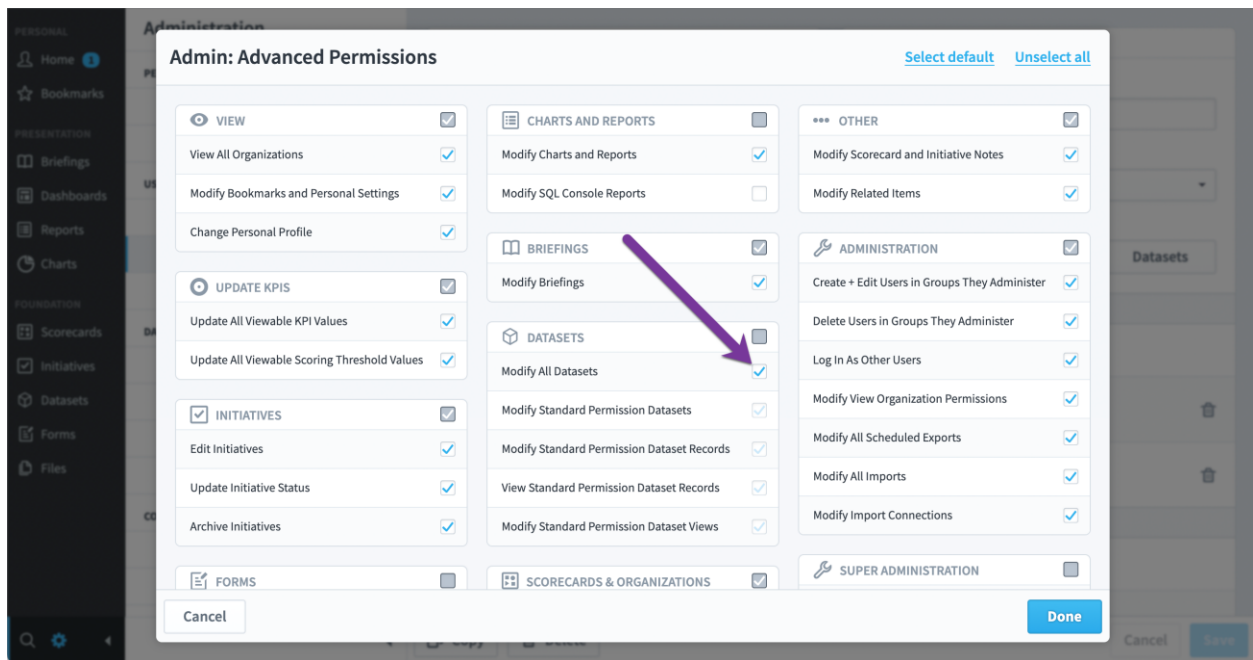
When Dale logs in, he'll see a permission filter permanently applied to every screen that shows dataset data.



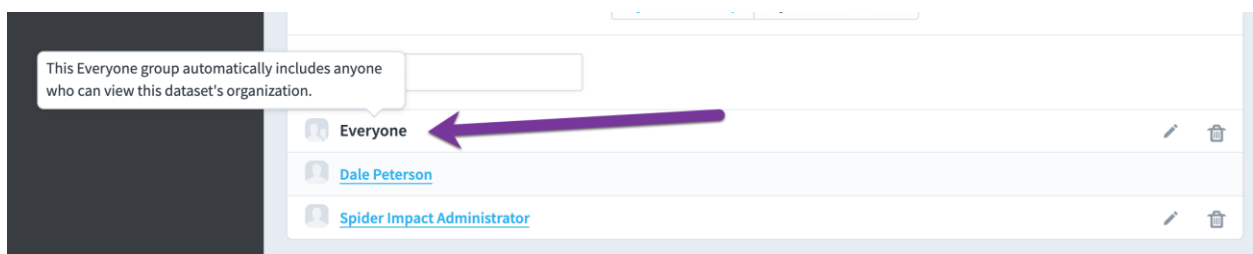
Viewing without explicit advanced permissions

There are two notable exceptions to the rule that only users and groups who are explicitly granted access can see advanced permissions datasets.

First is the “Modify All Datasets” permission. This is unchecked by default and allows members of the group to modify all datasets that the group can see, regardless of whether advanced permissions is on.



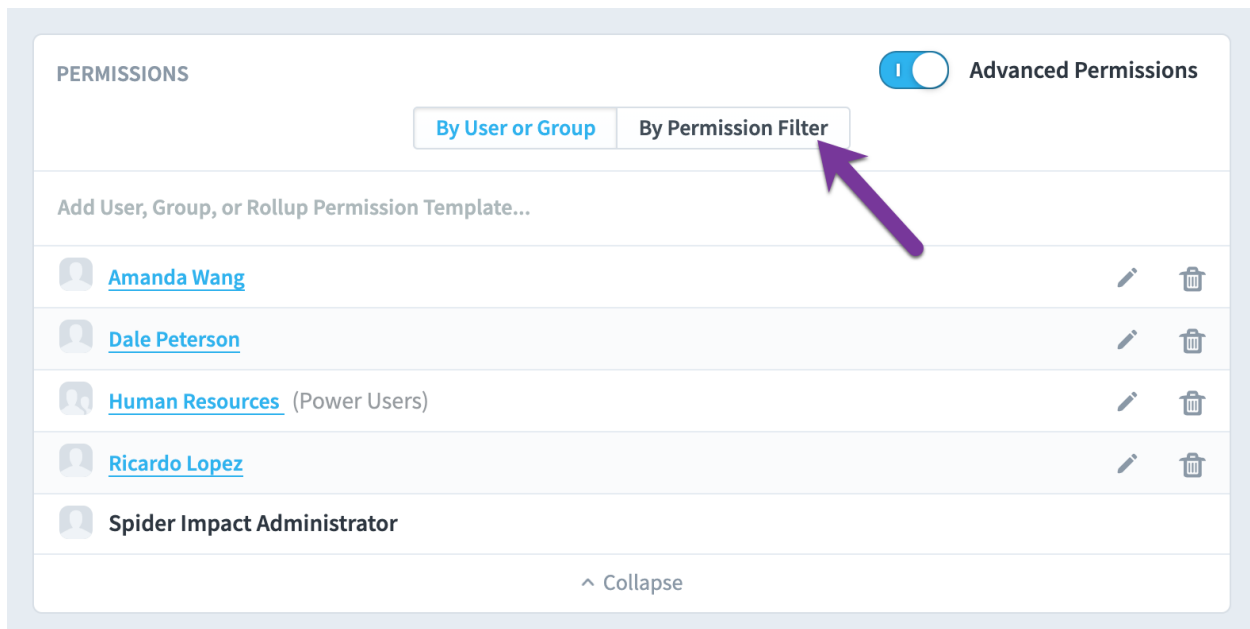
Second, you can add a user named “Everyone” when advanced permissions is on. This allows anyone who can see the dataset to view its data, and by editing the Everyone user’s permissions, you can restrict the records they can see or assign actions that every user can do.



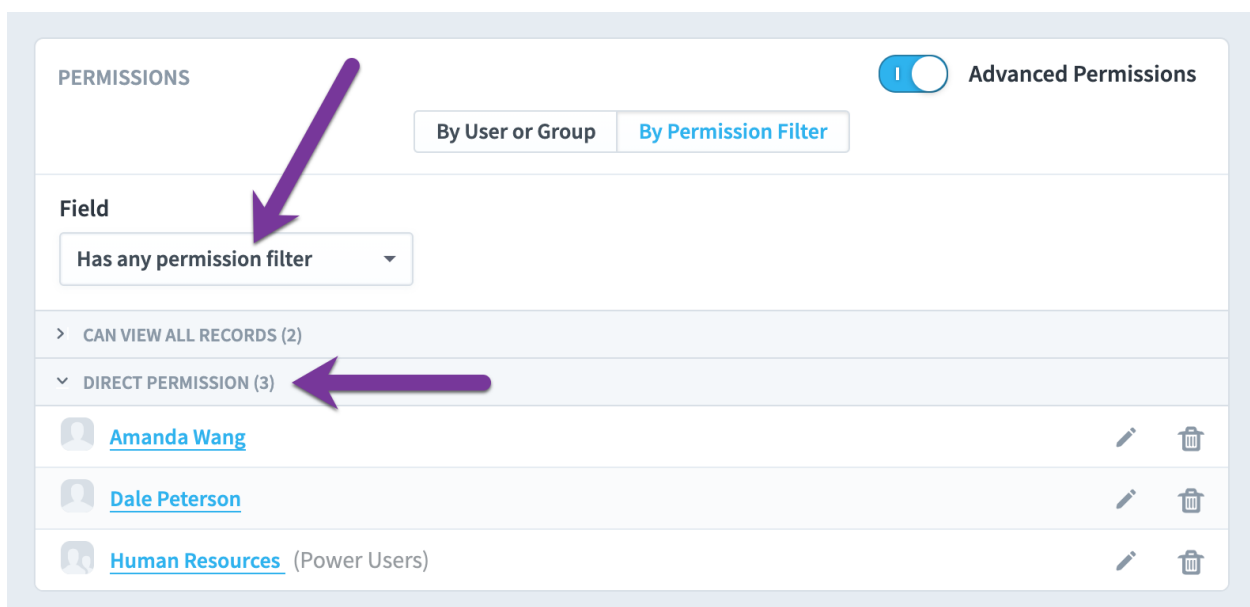
Auditing dataset permissions

The default view for advanced permissions is “By User or Group”. This allows you to see a list of everyone who can view the dataset, and you can edit their permission by clicking on the edit button on the right.

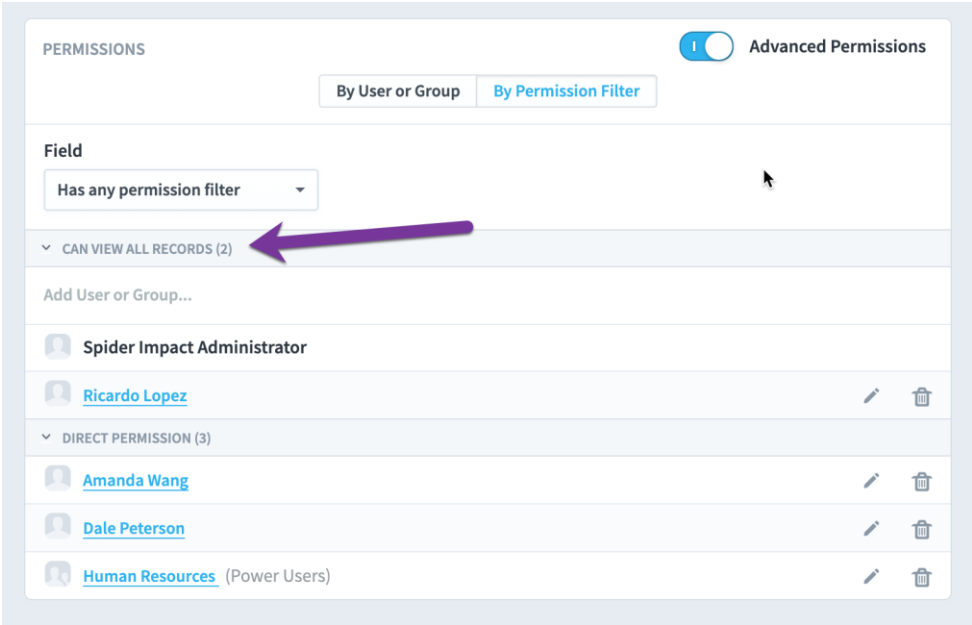
Instead of viewing permissions “by user or group”, you can also choose to view permissions “by permission filter”. This is helpful when auditing exactly what people can see within the dataset.



The default view is showing users and groups that have any permission filters at all. As you can see, there are two users and one group who have permission filters, which means they can't see all of the dataset records. Just like on the “by user or group” view, you can click on the edit button on the right to see and edit their permission filters.

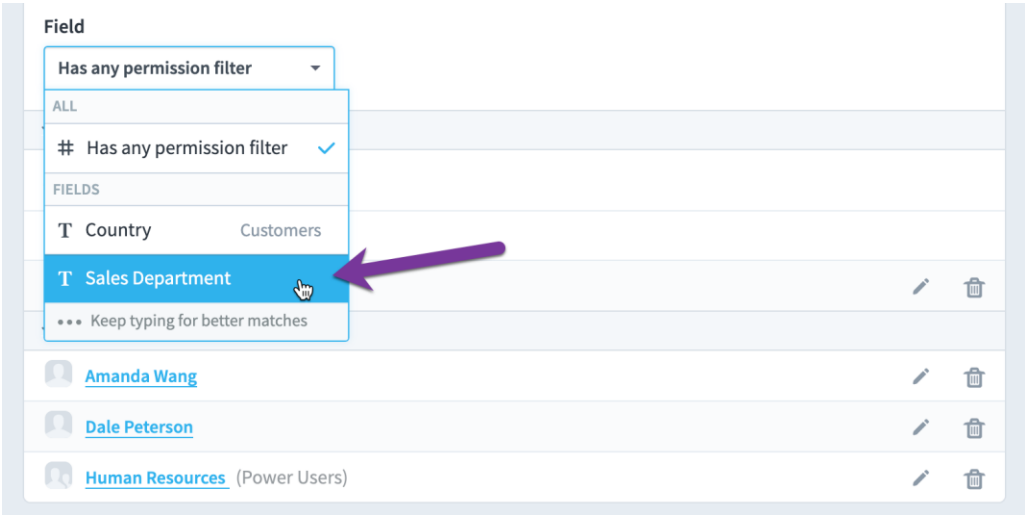


There's also a list of users and groups who can view all records. It's collapsed by default.

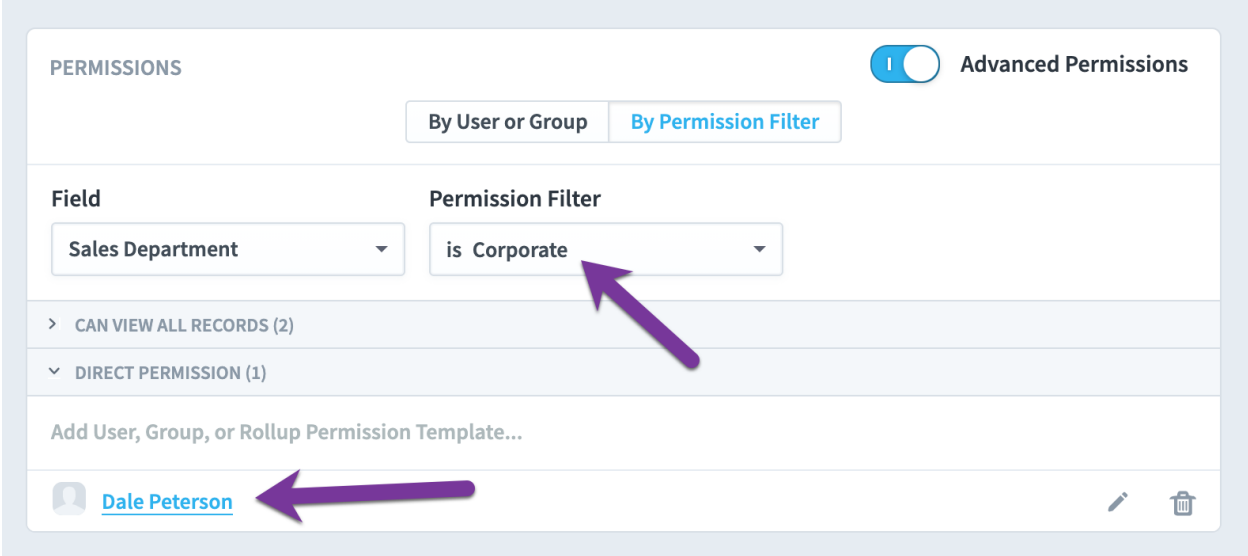


This gives us a good impression of what's going on. There are two users or groups who can view everything, and there are three users or groups who can view only some records. We can take our permissions audit quite a bit further, though.

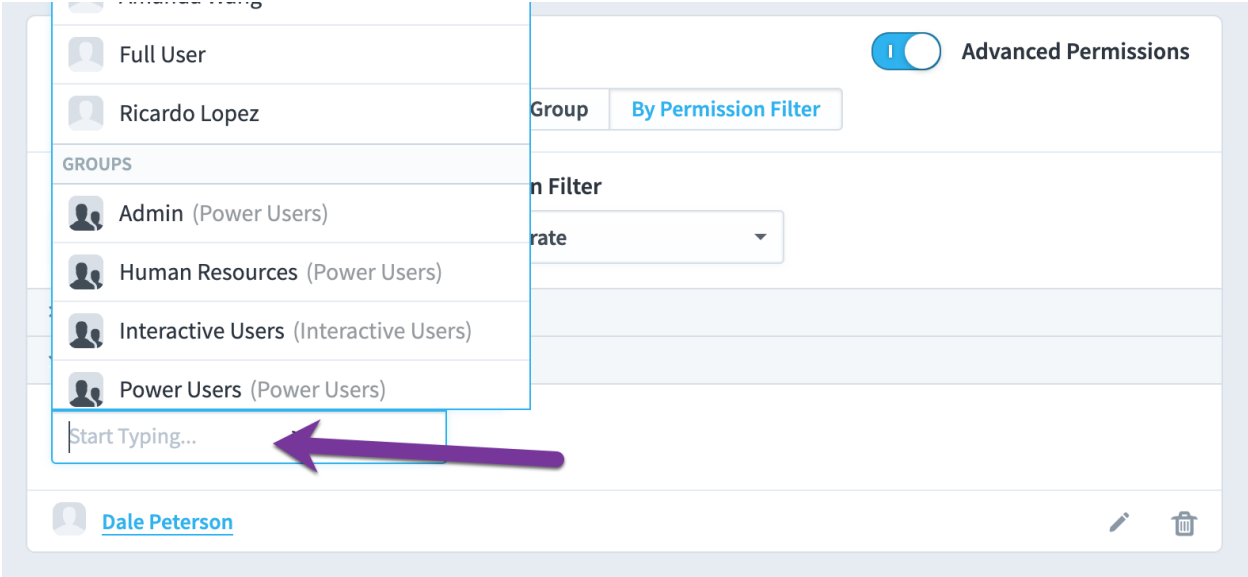
If we click the "Field" select, we can see all of the dataset's fields that have a user or group's permission filter applied to them. In this example, "Country" and "Sales Department" are the two fields with permission filters. We'll choose Sales Department.



We now see that Dale Peterson has a "Sales Department is Corporate" permissions filter directly applied to him. We also see the collapsed "view all" section with the same two users who can view all records. That means there are three users in the software who can view corporate sales department records.



You can also quickly assign other users and groups permission to see Corporate sales records.



When we click the "Permission Filter" dropdown we see that users or groups also have permission filters for the sales department being retail.

PERMISSIONS Advanced Permissions

By User or Group By Permission Filter

Field: Sales Department

Permission Filter:

- is Corporate
- is Corporate ✓
- is Retail

> CAN VIEW ALL RECORDS (2)

▼ DIRECT PERMISSION (1)

Add User, Group, or Rollup Permission Template...

Dale Peterson

By exploring your dataset permissions this way, you can quickly understand who has access to what, and you can ensure that only the correct users have access to sensitive data.

Advanced: Linking datasets

Creating links

You can unlock powerful insights by linking datasets together. In this example we have two datasets. The first is information about our customers, including their address and points of contact. The primary key is a Customer ID.

Device Customers






Explore Records Edit

FIELDS + Add						
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Address	Text	Address			no categories	
City	Text	City			no categories	
Company	Text	Company			no categories	
Country	Text	Country			no categories	
County	Text	County			no categories	
Customer ID	Text	Customer ID			no categories	
Postal Code	Text	Postal Code			no categories	

The second dataset is information about all of the sales we've had over time. There's a sale date, sale price, and the Customer ID of the organization who made the purchase. In order to link the Customer ID field to the customers dataset, we'll edit the Customer ID field in the device sales dataset.

Device Sales

Explore Records Edit

FIELDS						+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	Edit
Customer ID	Text	Customer ID			no categories	
Sale Date	Date	Sale Date				
Sale Price	Currency	Sale Price			no ranges	
Sales Department	Text	Sales Department			no categories	
Sales Employee	Text	Sales Employee			no categories	

We'll change the field type from Text to Dataset Link and choose the Device Customers dataset. This tells Spider Impact that the values for this Customer ID field match the primary key values of the Device Customers dataset.

Edit Field

Type: Basic Column (From Source Data): Customer ID

Name: Customer ID

Field Group: Choose or create a Field Group (optional)

Data Type: Dataset Link

Linked Dataset: Device Customers

Allow This Field's Values To Be Overridden

Hide From Non-Administrators

Cancel Done

The Customer ID field is now a dataset link, so we'll save the dataset.

Device Sales [Info] [Refresh]

Explore | Records | **Edit**

FIELDS + Add

NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Customer ID	Dataset Link	Customer ID				[Edit] [Delete]
Sale Date	Date	Sale Date				[Edit] [Delete]
Sale Price	Currency	Sale Price			no ranges	[Edit] [Delete]
Sales Department	Text	Sales Department			no categories	[Edit] [Delete]
Sales Employee	Text	Sales Employee			no categories	[Edit] [Delete]

PERMISSIONS By User or Group By Permission Filter Advanced Permissions

Add User, Group, or Rollup Permission Template...

- [Dale Peterson](#) [Edit] [Delete]
- [Spider Impact Administrator](#)

[Move] [Delete] [Cancel] **Save**

Fields from linked datasets

Our two datasets are now linked together and there is now a "Fields From Linked Datasets" panel on both datasets' Edit tabs. You can click the "Add" button to choose which fields you want to appear from the linked dataset.

Device Sales [Info] [Refresh]

Explore | Records | **Edit**

FIELDS + Add

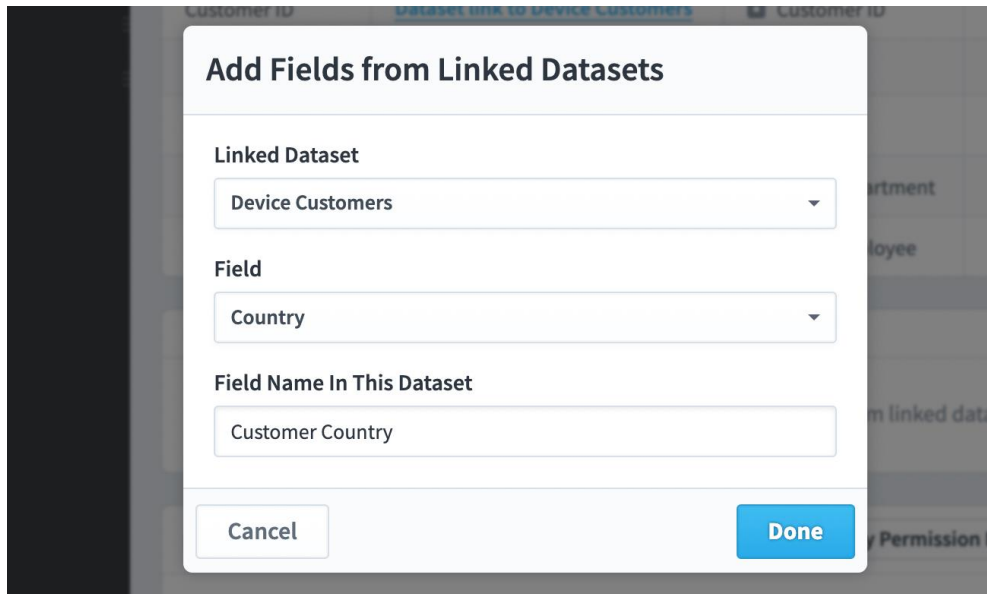
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Customer ID	Dataset link to Device Customers	Customer ID				[Edit] [Delete]
Sale Date	Date	Sale Date				[Edit] [Delete]
Sale Price	Currency	Sale Price			no ranges	[Edit] [Delete]
Sales Department	Text	Sales Department			no categories	[Edit] [Delete]
Sales Employee	Text	Sales Employee			no categories	[Edit] [Delete]

FIELDS FROM LINKED DATASETS + Add

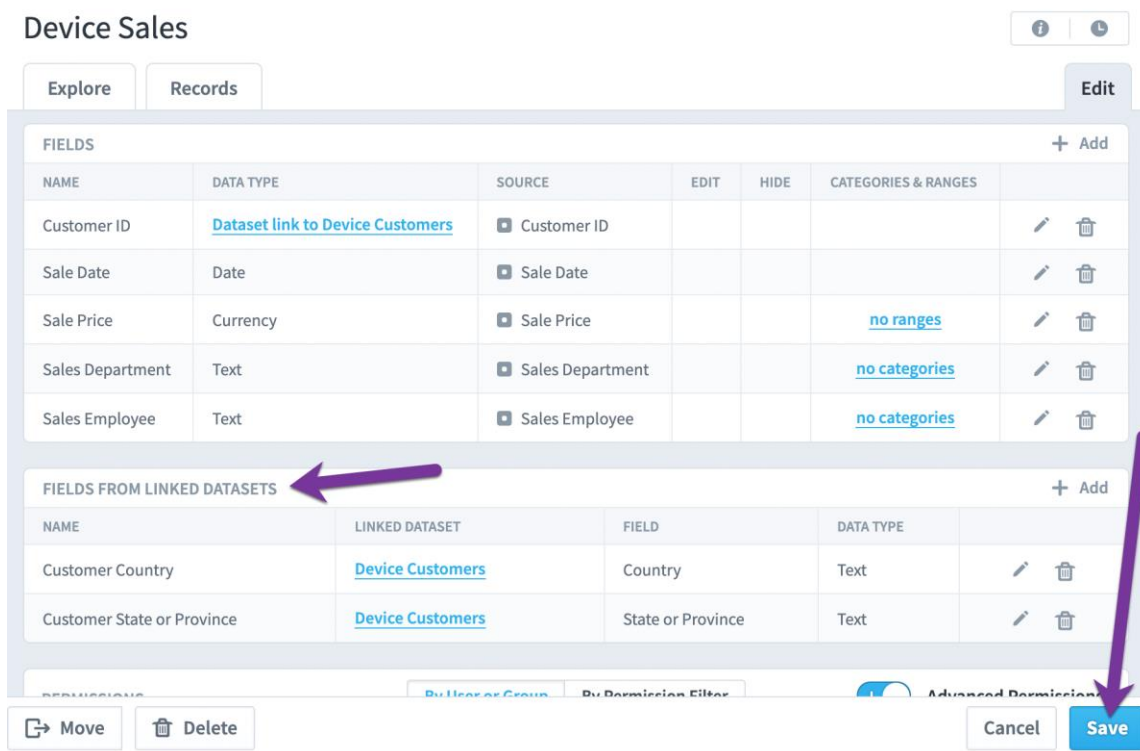
There are no fields from linked datasets

PERMISSIONS By User or Group By Permission Filter Advanced Permissions

In this example we'll choose to add the Customer Country to the Device Sales dataset.



And we'll save the dataset again.



We are now able to break down our sales totals by Country.

Device Sales

Explore Records Edit

ACTIVE FILTERS + Add

There are no Active Filters

Choose a field... List

SALE PRICE SUM \$28,804,269.46

CUSTOMER COUNTRY (Device Customers)

CUSTOMER COUNTRY	SALE PRICE SUM	SALE PRICE %
United States	\$15.4M	53.34%
United Kingdom	\$6.42M	22.28%
Canada	\$3.63M	12.6%
Australia	\$3.39M	11.77%

Complex linking

Dataset links are bidirectional. Once a link is set up between two datasets, you can set up fields on both sides of the link. In this example the "Fields From Linked Datasets" panel now shows for the Customers dataset too.

Device Customers

Explore Records Edit

FIELDS + Add

NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Address	Text	Address			no categories	
City	Text	City			no categories	
Company	Text	Company			no categories	
Country	Text	Country			no categories	
County	Text	County			no categories	

Expand

FIELDS FROM LINKED DATASETS + Add

There are no fields from linked datasets

Move Delete Cancel Save

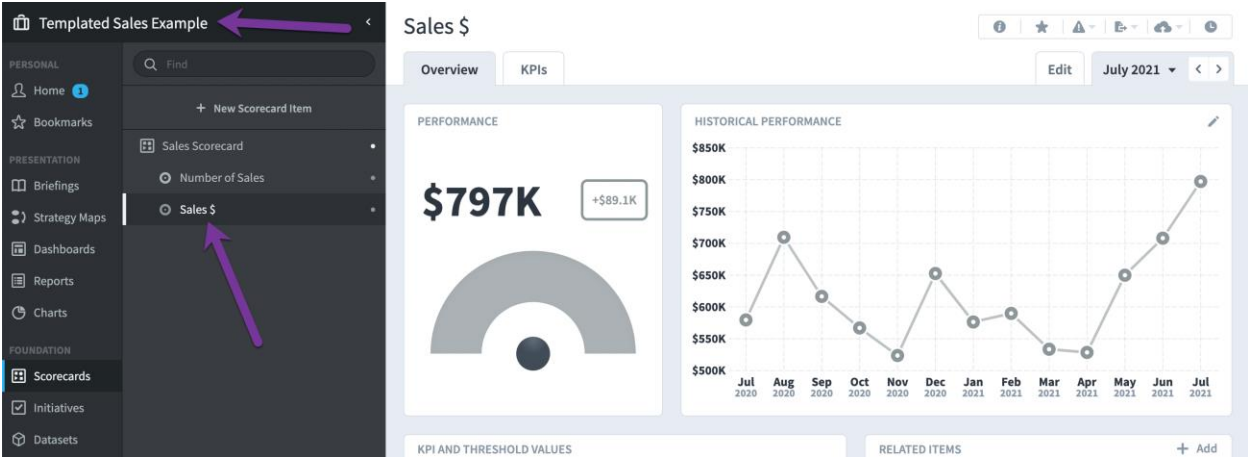
Linking isn't limited to two datasets either. If several datasets are linked together, datasets that aren't directly linked can share fields. You can even build calculated fields using data from multiple linked datasets.

Advanced: Dataset templates

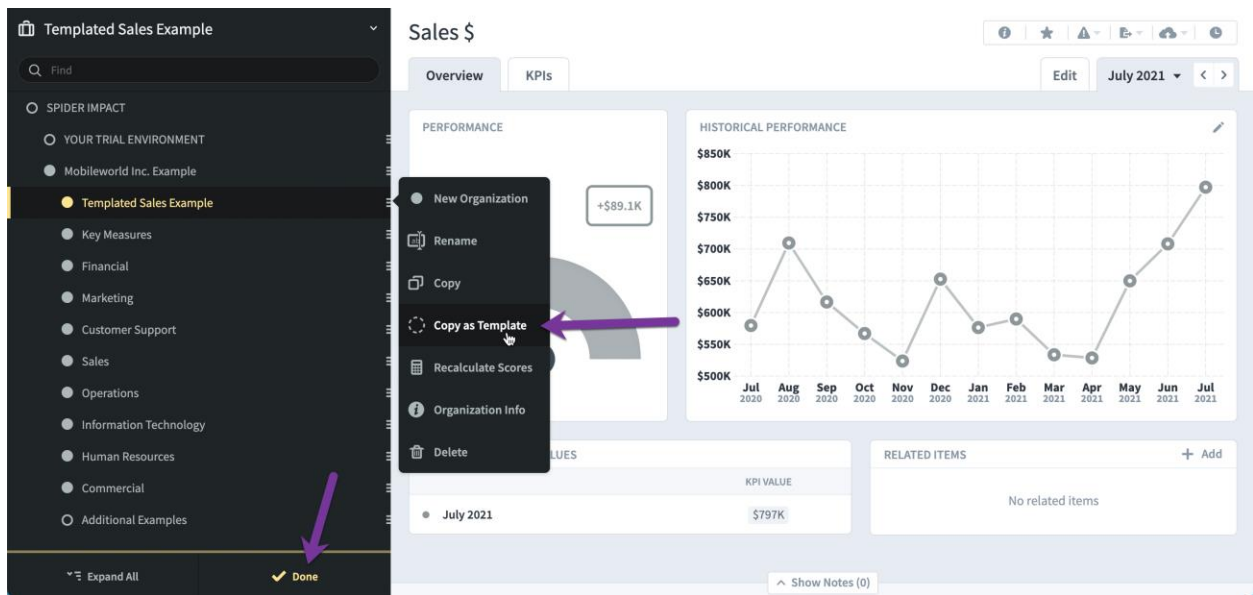
Templated organizations based on dataset values

Organization templates allow you to quickly roll out similar scorecard structures to multiple organizations. When your organizations have dataset KPIs, this process is even easier.

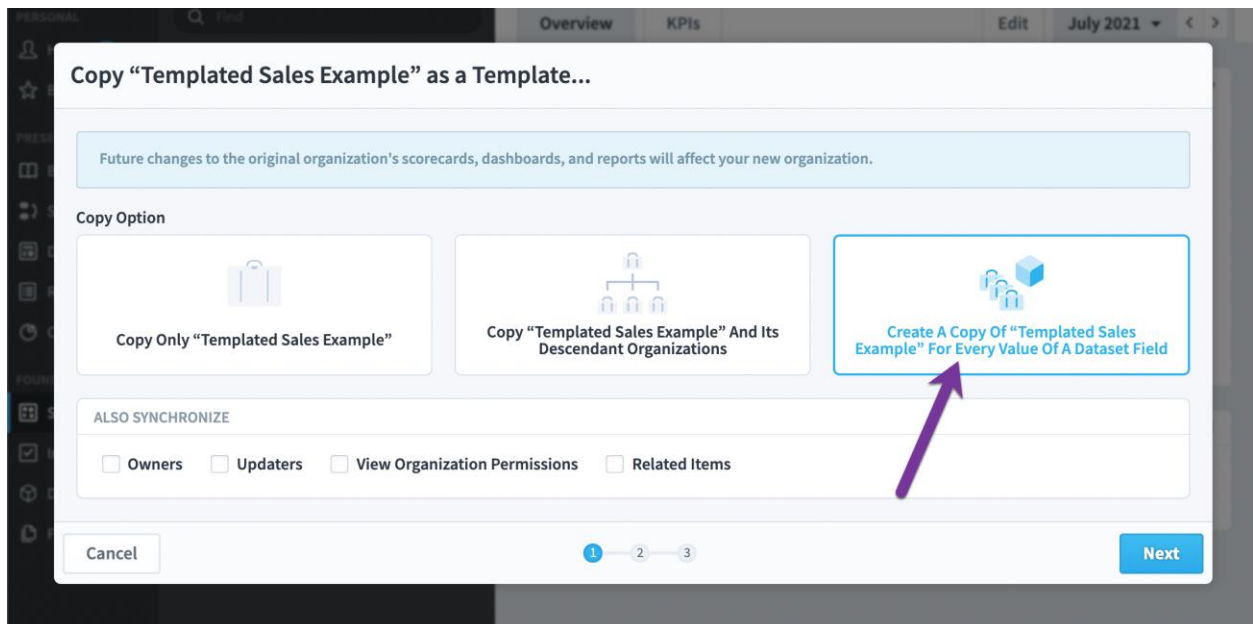
In this example we have an organization called "Templated Sales Example" that has two KPIs. "Number of Sales" tracks the total number of sales over time, and "Sales \$" tracks the value of sales over time. As you can see here, there were \$797,000 in sales in July 2021.



We're going to click on the organization name on top to expand the organization pane, and then put the organization tree into edit mode by clicking on the Edit button on the bottom. Then we'll click on our "Templated Sales Example" organization and choose "Copy as Template".

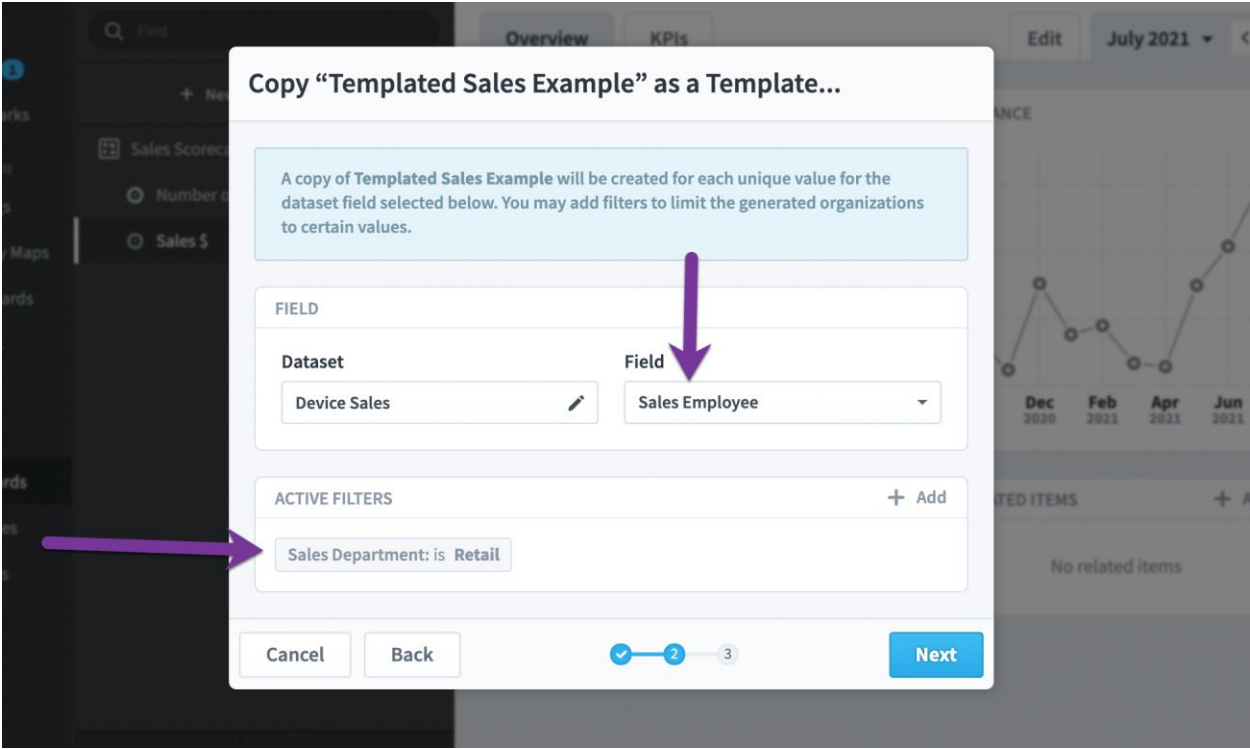


This opens the new template dialog. The first copy option would create a single copy of our organization. The middle option does the same thing, but would also copy any descendant organizations that we create later. We're going to choose the third option to "Create a copy of 'Templated sales example' for every value of a dataset field".



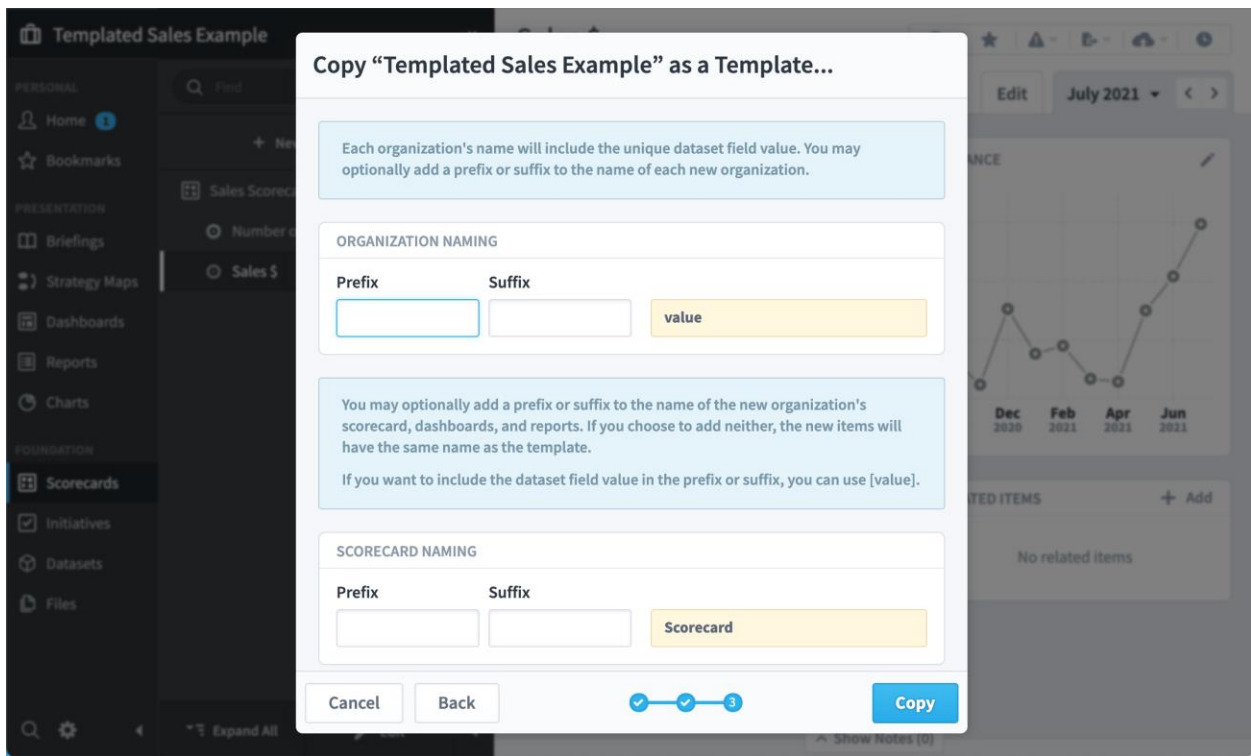
Our two KPIs are created from the Device Sales dataset, so we'll choose that here. We'll also choose the Sales Employee field. If we decide to not add any filters, Impact will create a separate organization for every sales employee.

Finally, we're going to add a filter to only include records where the sales department is Retail. When you apply a filter, it restricts the records, which in turn can restrict the number of organizations that are created. So, rather than creating an organization for every sales employee, we're going to create an organization for every *retail* sales employee.

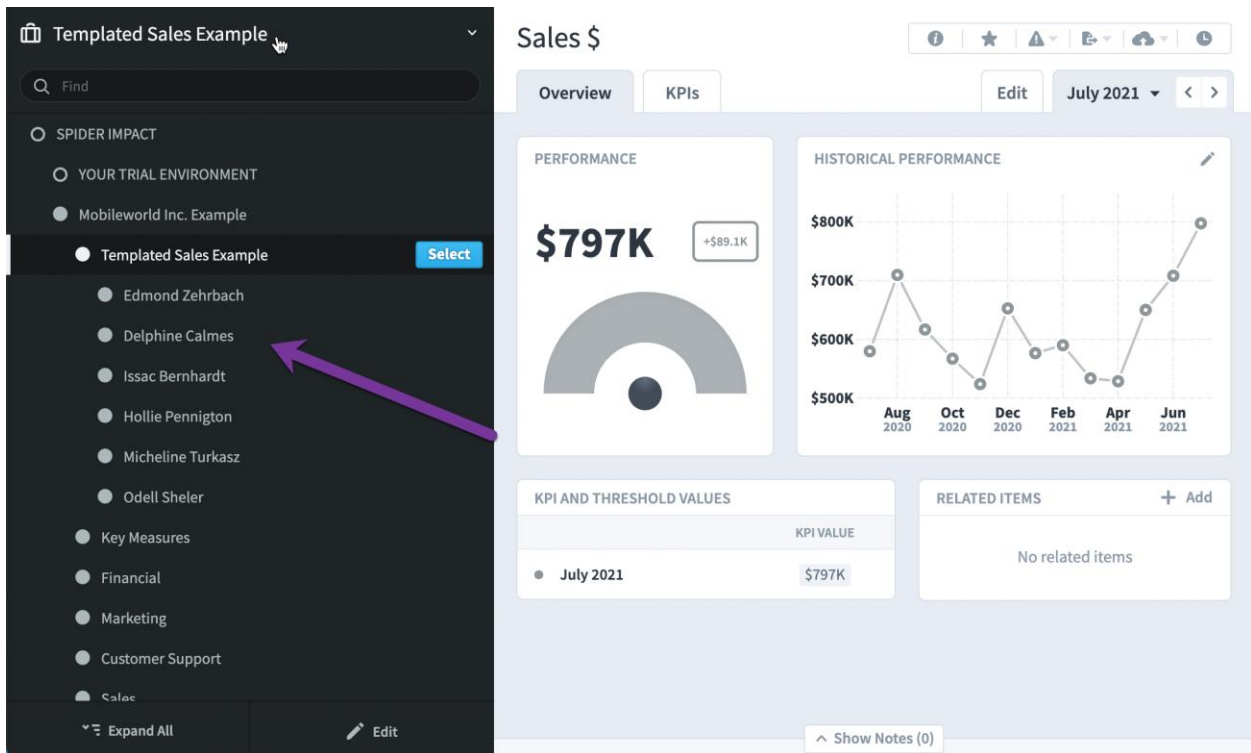


The one exception with filters is rollup trees. If the filter is for the same rollup tree field as the field you're using for the template, the filter restricts the organizations you create, but the descendant totals are always used for the KPIs.

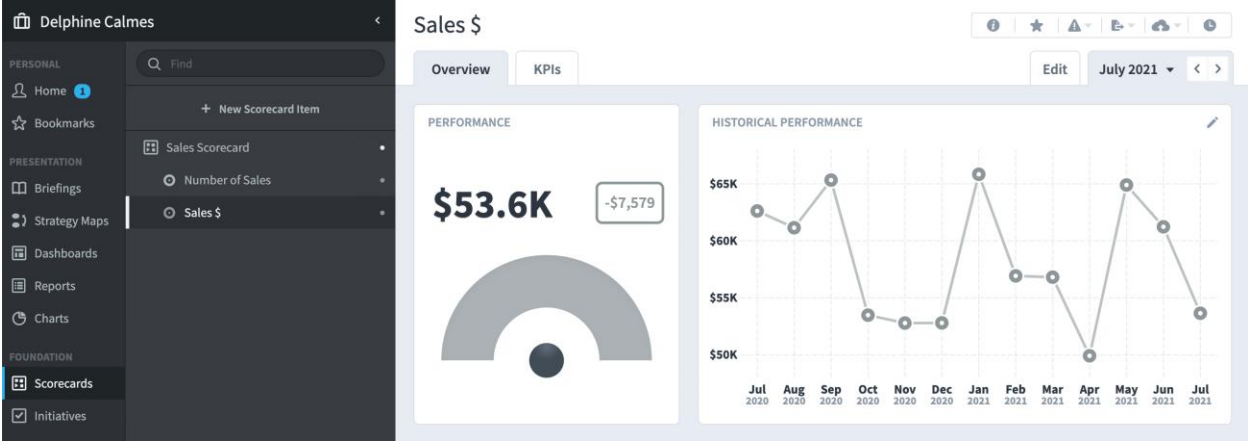
The last step in the wizard is to optionally add prefixes or suffixes to the names of templated items. We'll just click Copy.



After a few seconds, new organizations start to appear in the organization tree underneath our template. There are 6 organizations, one for every retail employee.



When we click on Delphine Calmes, we can see that the KPIs now show data specific to that employee. Delphine had \$53,000 in sales in July 2021.



Just like with all organization templates in Impact, you can create additional KPIs in the template and they'll be automatically copied to the templated copies. You can also create KPIs in the templated copy organizations to tracks things for only that organization.

Advanced: Dataset rollup trees

Using dataset rollup trees

Dataset rollup trees allow you to track hierarchical data. They're great for companies and governments that have large organization structures, as well as for geographic data (Country > State/Territory > Postal Code).

In this example we have a military fitness test dataset with 333,000 records. We've added the Unit Identification Code (UIC) field to the Explore tab, and we can see that the W4K9AA organization has the most fitness test records in this dataset.

Mobileworld Inc. Example

PERSONAL: Home, Bookmarks

PRESENTATION: Briefings, Strategy Maps, Dashboards, Reports, Charts

FOUNDATION: Scorecards, Initiatives, **Datasets**, Files

Fitness Tests

Explore | Records | Edit

ACTIVE FILTERS: + Add

There are no Active Filters

Choose a field... | List

NUMBER OF FITNESS TESTS: 333,000

UIC	NUMBER OF FITNESS TESTS	FITNESS TESTS %
W4K9AA	3,865	1.16%
W8AEFF	2,242	0.67%
W4K8AA	1,882	0.57%
W1D5D1	1,654	0.5%
W4K7AA	1,125	0.34%
W0Q101	1,054	0.32%
W1D5C2	849	0.25%

You haven't saved this view

Save

Militaries are very hierarchical organizations, so we're going to edit the UIC field and turn it into a rollup tree.

Mobileworld Inc. Example

PERSONAL: Home, Bookmarks

PRESENTATION: Briefings, Strategy Maps, Dashboards, Reports, Charts

FOUNDATION: Scorecards, Initiatives, **Datasets**, Files

Fitness Tests

Explore | Records | Edit

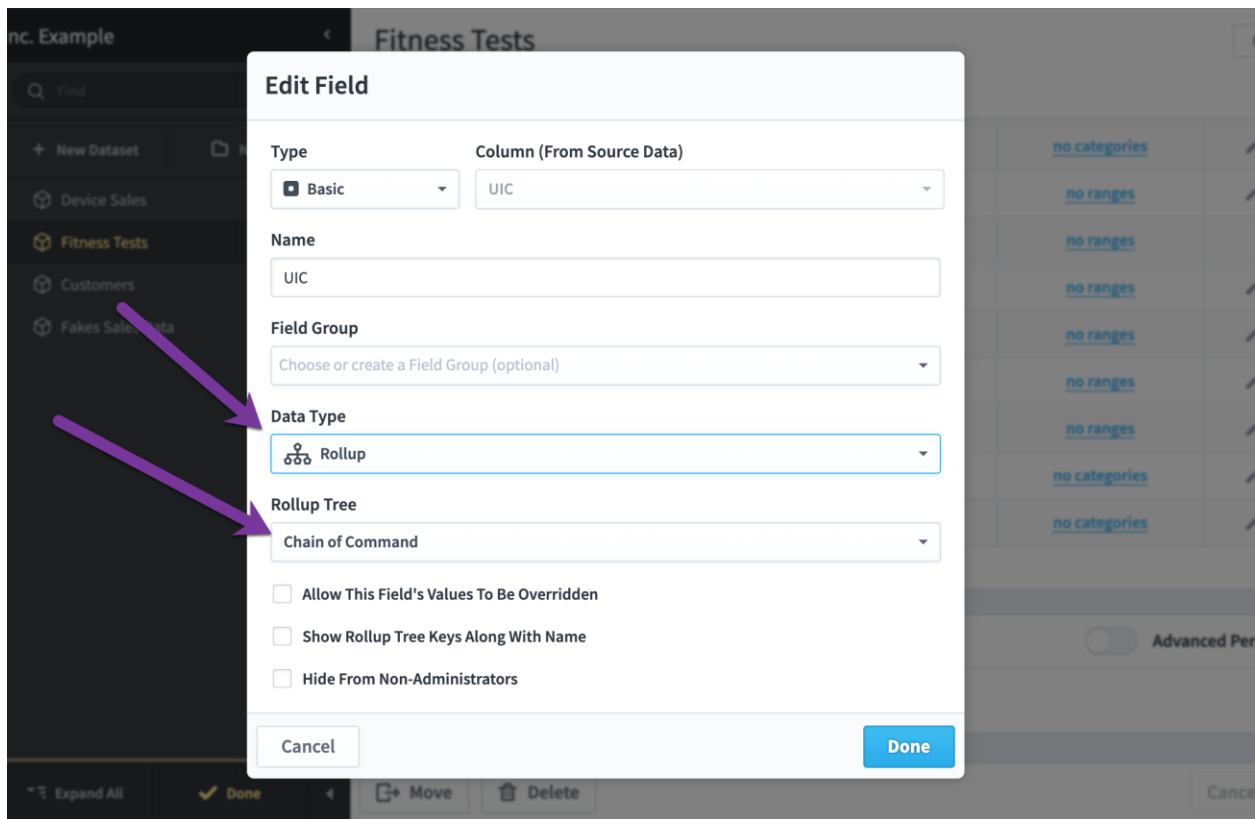
Field Name	Data Type	Field ID	Field Properties	Actions
RawRun	Text	RawRun	no categories	Edit, Delete
RawSU	Number	RawSU	no ranges	Edit, Delete
RecordID	Number	RecordID	no ranges	Edit, Delete
ScorePU	Number	ScorePU	no ranges	Edit, Delete
ScoreRun	Number	ScoreRun	no ranges	Edit, Delete
ScoreSU	Number	ScoreSU	no ranges	Edit, Delete
ScoreTotal	Number	ScoreTotal	no ranges	Edit, Delete
Sex	Text	Sex	no categories	Edit, Delete
UIC	Text	UIC	no categories	Edit, Delete

PERMISSIONS: Advanced Permissions

Everyone who can see this organization can see this dataset.

Move | Delete | Cancel | Save

We change the data type from Text to Rollup, and then choose which rollup tree we want. Rollup trees are build and managed in the Administration section, and we'll cover how to do that next. In this example we're choosing Chain of Command.



Now when you add the UIC field to the Explore tab, you see a tree instead of a list of UIC. That's because Impact has matched the UICs to items in the Chain of Command rollup tree and is now able to show you aggregated totals. And, just like every other field type, you can click on an item in the tree to drill down.

UIC		
UIC	NUMBER OF FITNESS TESTS	FITNESS TESTS %
U.S. Army	321K	96.47%
Dept of the Army	238K	71.33%
U.S. States and Territories	83.7K	25.15%
Blank	11.7K	3.53%

GENDER		
GENDER	NUMBER OF FITNESS TESTS	FITNESS TESTS %
M	277K	83.22%
F	55.9K	16.78%

At the top of the UIC panel it now shows the tree level that we've drilled down to, as well as a back button that will take us to where we were before. As you navigate up and down the tree, Impact automatically applies filters to restrict records to only that tree level. In this example you can see the Gender panel updating with new numbers as we go down the tree.

The screenshot shows two panels. The top panel, titled 'UIC', has a breadcrumb trail '< Back is Dept of the Army and all descendants'. Below it is a table with three columns: 'UIC', 'NUMBER OF FITNESS TESTS', and 'FITNESS TESTS %'. The bottom panel, titled 'GENDER', has a table with three columns: 'GENDER', 'NUMBER OF FITNESS TESTS', and 'FITNESS TESTS %'. A purple arrow points from the 'Dept of the Army' row in the UIC table to the 'M' row in the Gender table.

UIC	NUMBER OF FITNESS TESTS	FITNESS TESTS %
Dept of the Army	238K	100%
US Army Commands (WARCFF)	235K	99.06%
Headquarters Department of the Army (W0ZUFF)	1,557	0.66%
Office of the Secretary of the Army Controlled Activities	674	0.28%

GENDER	NUMBER OF FITNESS TESTS	FITNESS TESTS %
M	196K	82.49%
F	41.6K	17.51%

Here we've drilled down to a third tree level. Most rollup trees are fairly small, but Impact has been tested to perform well with trees as large as 50,000 items.

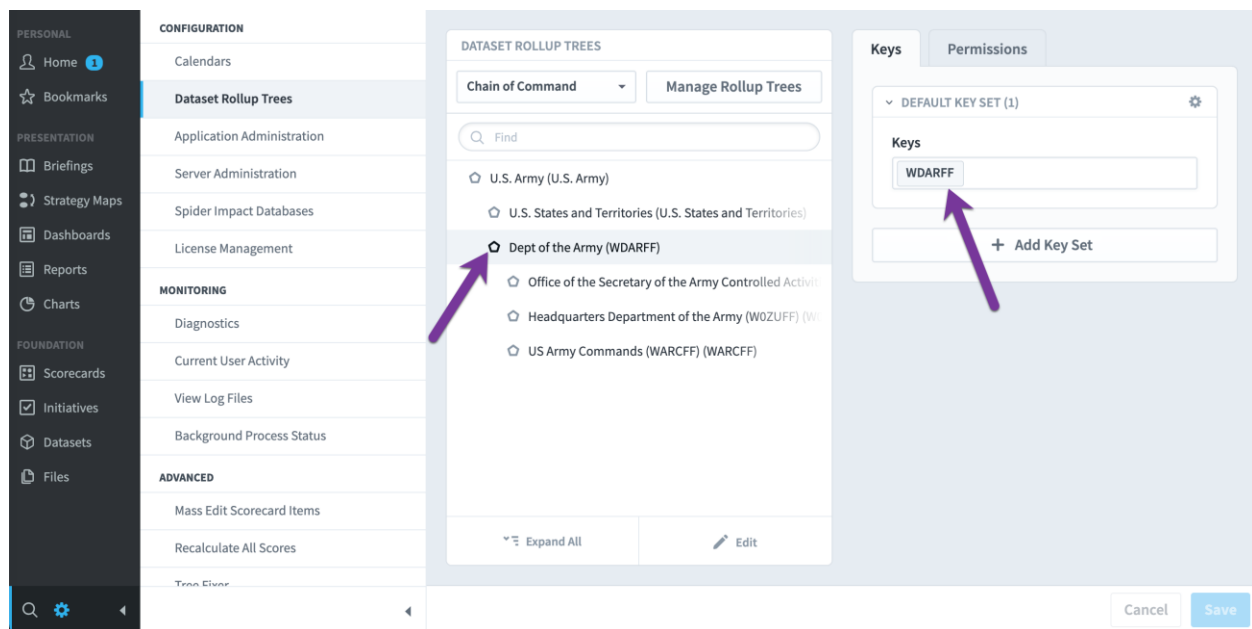
The screenshot shows two panels. The top panel, titled 'UIC', has a breadcrumb trail '< Back is US Army Commands (WARCFF) and all descendants'. Below it is a table with three columns: 'UIC', 'NUMBER OF FITNESS TESTS', and 'FITNESS TESTS %'. The bottom panel, titled 'GENDER', has a table with three columns: 'GENDER', 'NUMBER OF FITNESS TESTS', and 'FITNESS TESTS %'.

UIC	NUMBER OF FITNESS TESTS	FITNESS TESTS %
US Army Commands (WARCFF)	235K	100%
United States Army Reserve Command (W47AFF)	83.9K	35.65%
United States Army Forces Command (W3YBFF)	74.2K	31.52%
United States Army Training and Doctrine Command (W3YTFF)	32.2K	13.67%
United States Army Pacific (WJMZFF)	21.1K	8.95%
Other (Show 5 More)	24K	10.2%

GENDER	NUMBER OF FITNESS TESTS	FITNESS TESTS %
M	194K	82.53%
F	41.1K	17.47%

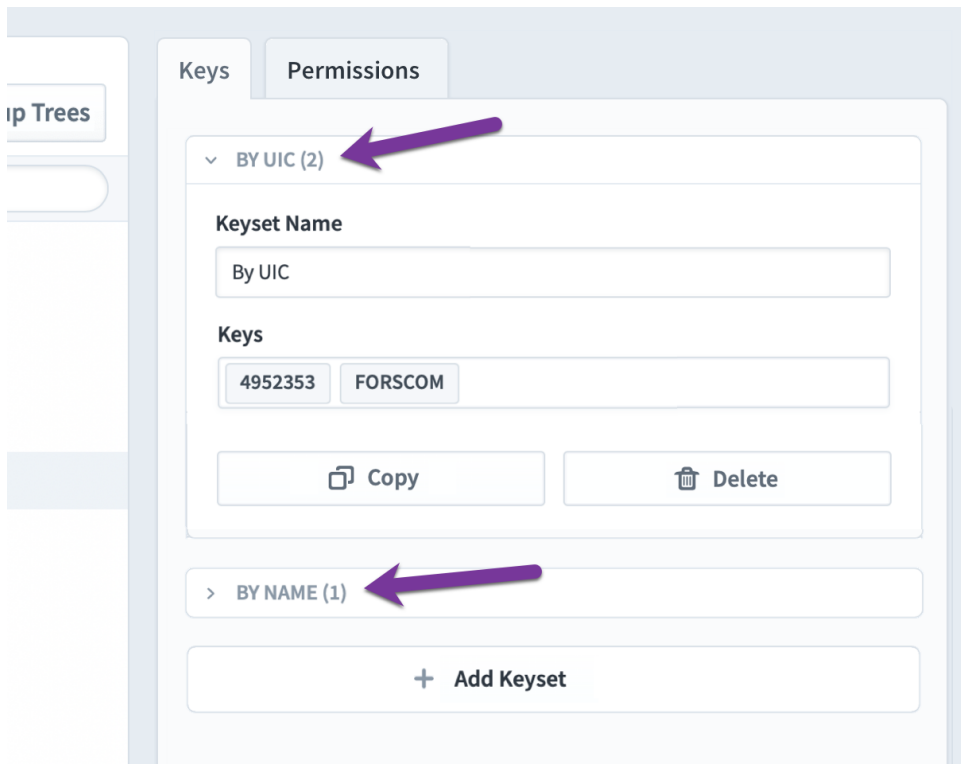
Managing dataset rollup trees

You can build and manage dataset rollup trees in the “Dataset Rollup Tree” page in Administration. On the left is the rollup tree that you choose in the dropdown above, and on the right, you can edit the keys for the selected tree item. In this example, any time a field’s value is “WDARFF”, it will match with the “Dept of the Army” item in the rollup tree.

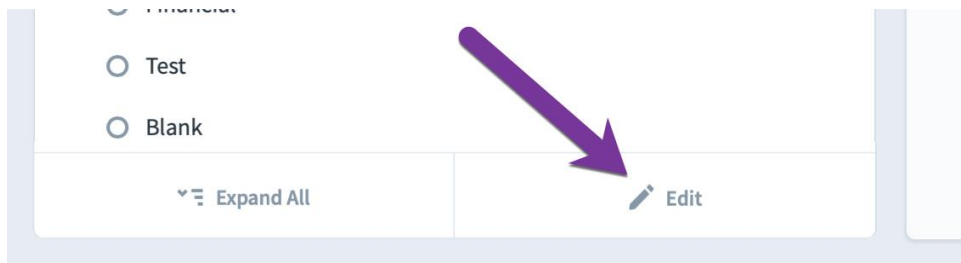


It's most common for every item in the rollup tree to have a single key. Sometimes, however, tree items will have no key at all and will instead be used only for showing aggregated data from its descendants. Other times a rollup tree item will have multiple keys.

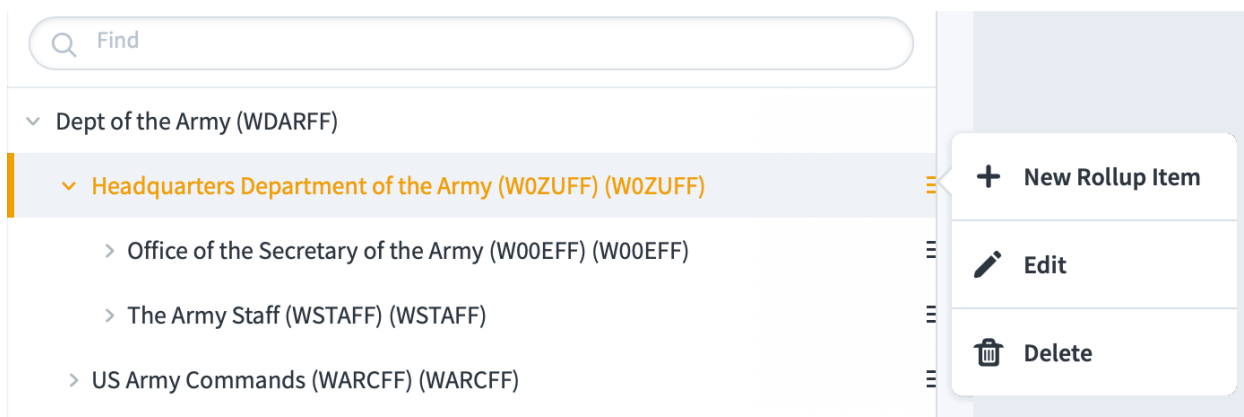
Because rollup trees are used across multiple datasets, each dataset may have a different way to reference the tree items. To support this, Impact allows you to create multiple keysets. For example, one keyset may be “By Payroll ID” and another keyset may be “By Human Resources ID”. When a rollup tree has multiple keysets, you’ll also need to choose which keyset to use when setting up a rollup tree field in your dataset. Keysets are important because different datasets can use the same key to refer to different items.



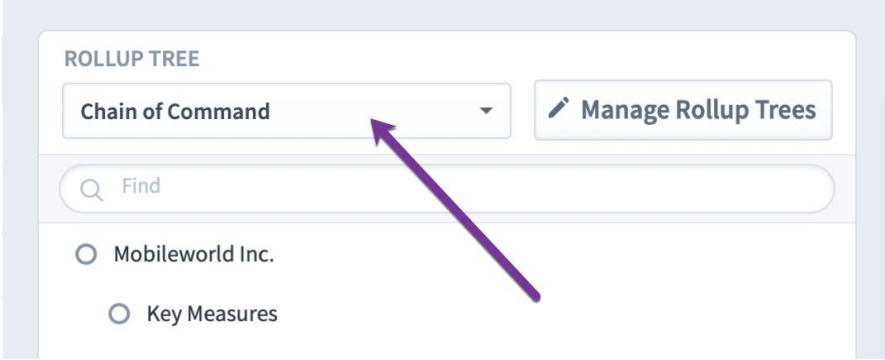
Just like other places in Impact, you can put the rollup tree in edit mode.



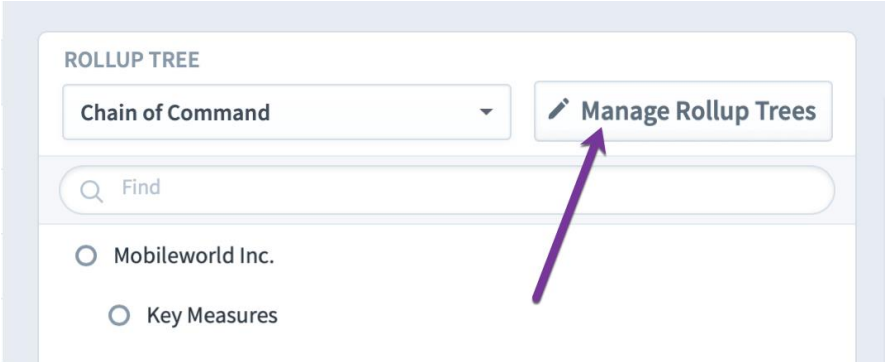
This allows you to drag and drop items to reorder the tree, and the selected item has a tooltip menu on it for modifying tree items.



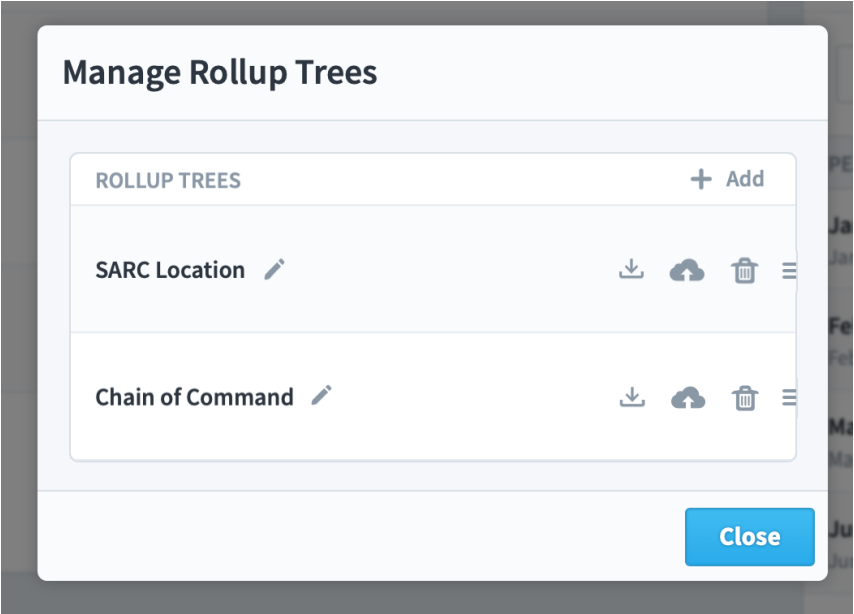
To change the rollup tree that you're editing, select the tree you want in the dropdown in the upper left.



Next to that is the Manage Rollup Trees button.

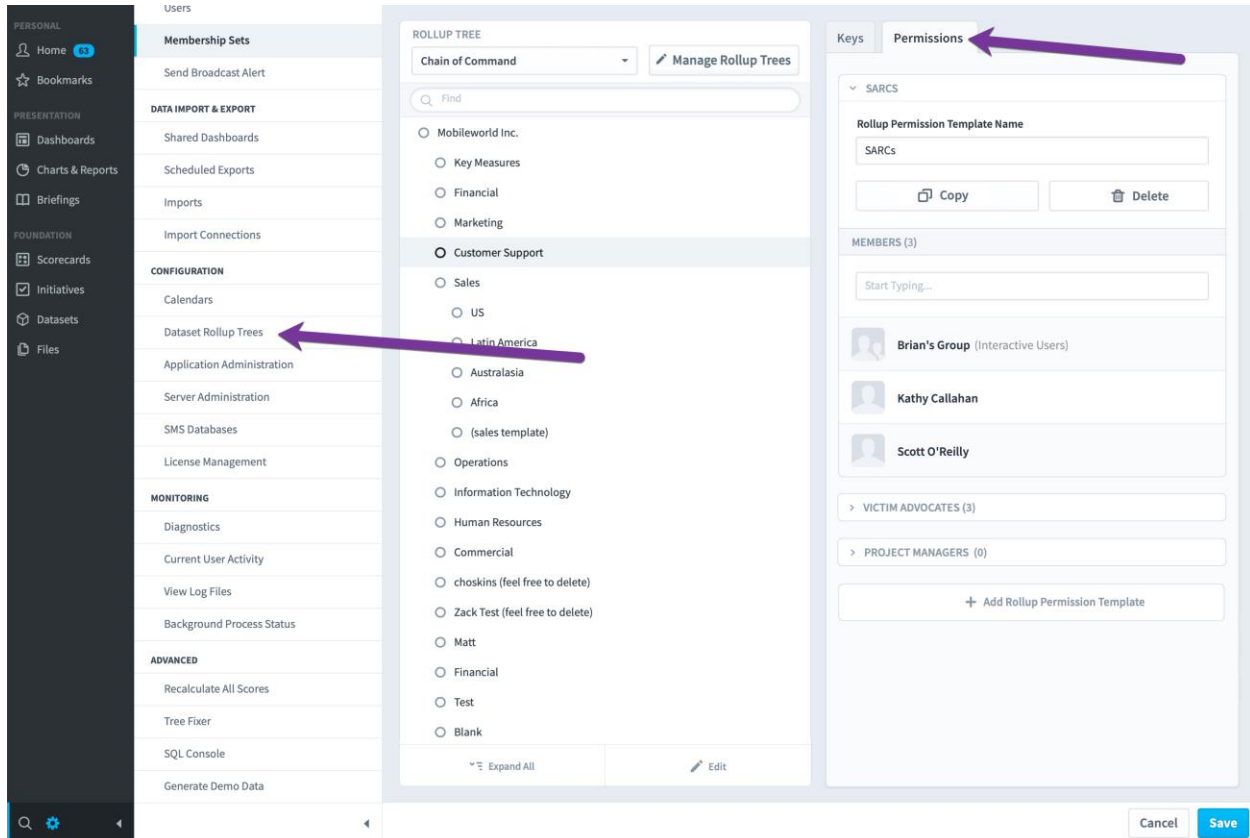


This opens a dialog where you can create, rename, reorder, delete, update, and download rollup trees.

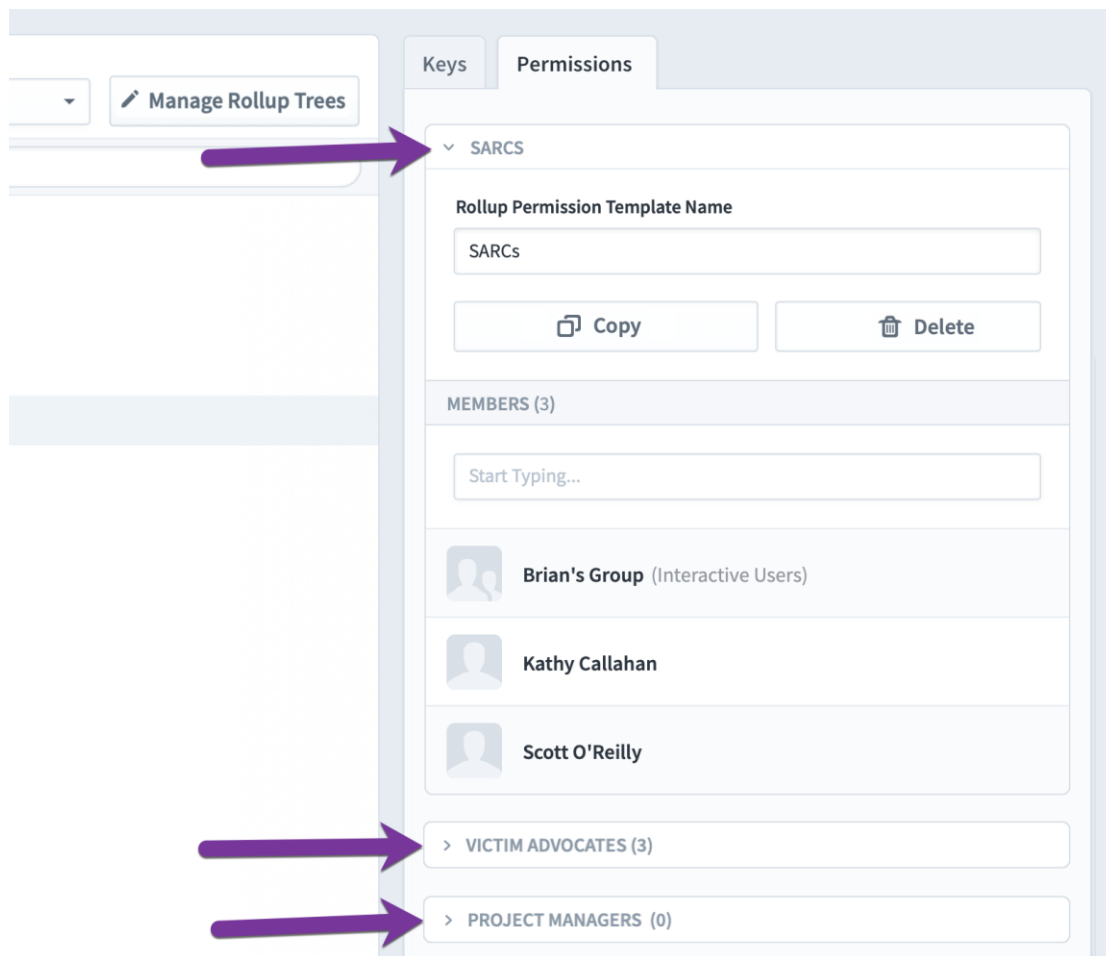


Dataset rollup permission templates

The other tab on the Admin > Dataset Rollup Trees page is Permissions. This is for creating Rollup Permission Templates, which can dramatically simplify the management of tree-based dataset permissions.



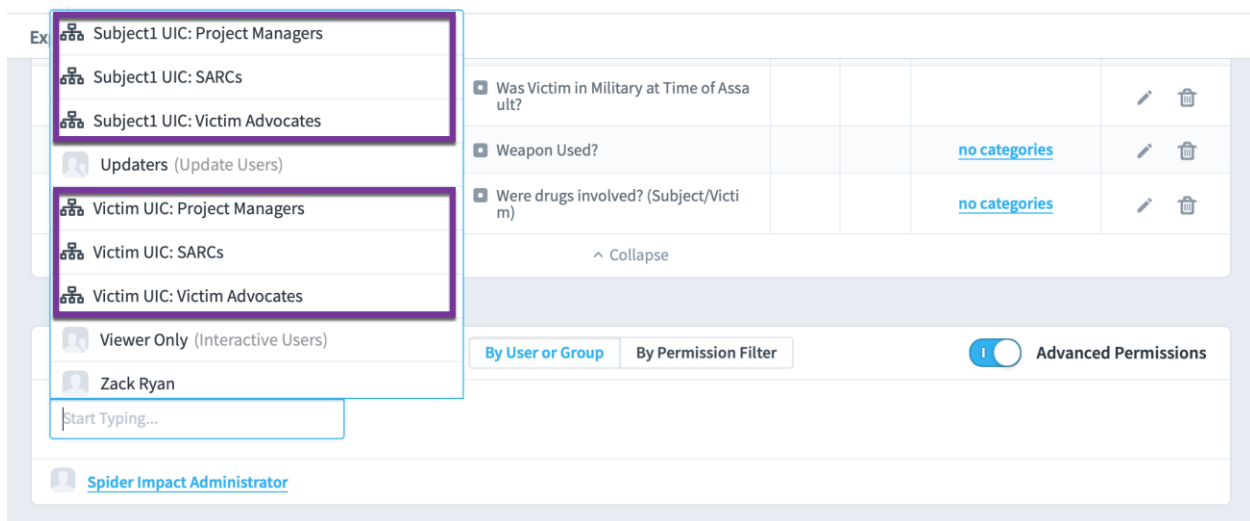
Each collapsible box on the Permissions tab is a rollup permission template. In this example we have created a rollup permission template for each of three different types of users: SARCS, Victim Advocates, and Project Managers. When you click on a rollup tree item on the left, you can assign users and groups to the different rollup permission templates on the right.



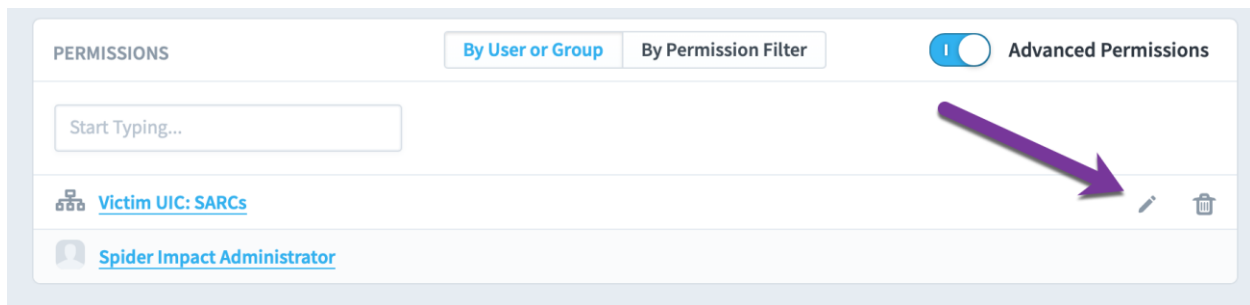
The most important thing to realize here is that a rollup permission template applies to an entire rollup tree. So, every rollup tree will have different rollup permission templates, but you'll see the same rollup permission templates as you're clicking on different items in a rollup tree. The only things that will change between items are the users and groups that are inside of each rollup permission template for the selected item.

In this example we're going to click through the various items in the UIC rollup tree and assign users and groups to the SARCS, PMs, and VAs permission templates.

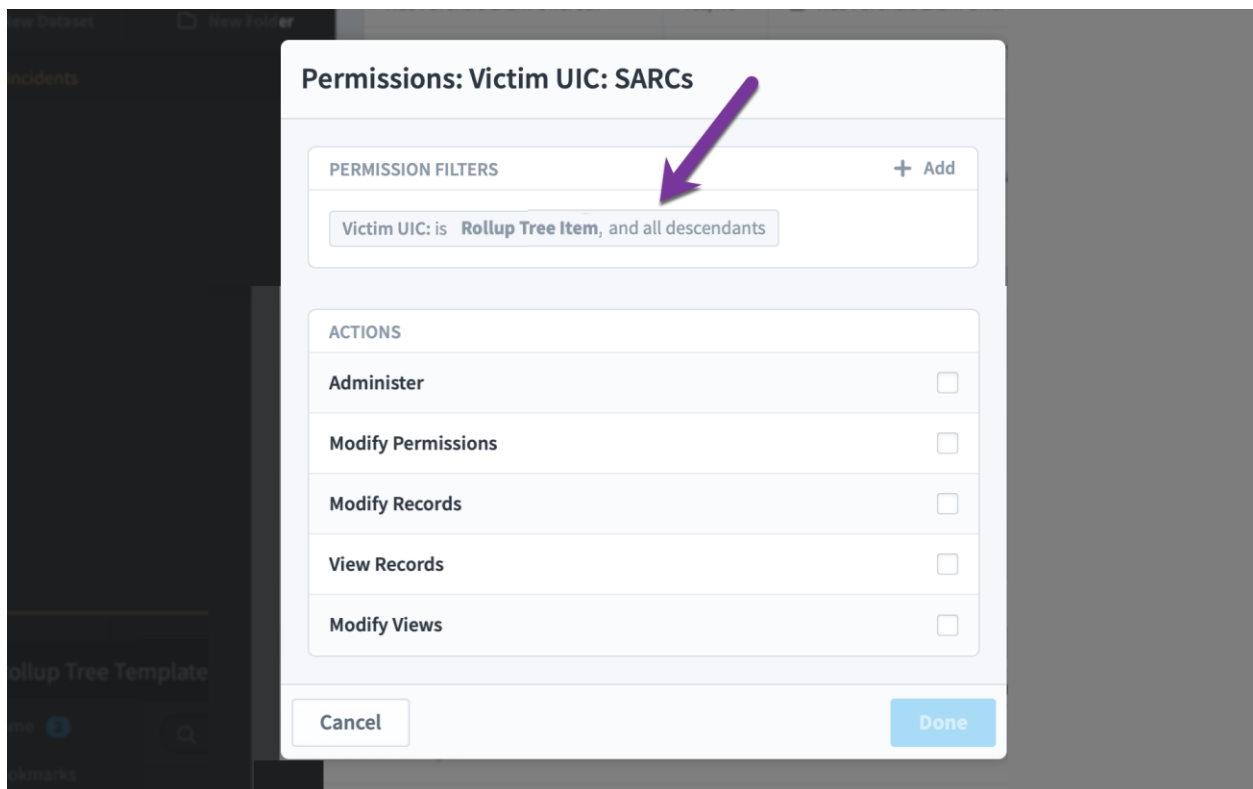
Once that's done, we can use these permission templates to quickly assign permissions to datasets. All you need to do is turn on advanced permissions for a dataset and then add your permission template like you would a user or a group. In this example there are two fields that use the UIC rollup tree, so there are two versions of each rollup template that we can choose from.



By adding the "Victim UIC: SARC's" to the dataset, every member of the SARC's permission template can now see records where the Victim UIC is in that SARC's UIC or below. You can edit this permission, just like you can with users or groups.



The only difference is that a permission template has a filter that can't be removed. This permanent filter shows that SARC's can see their rollup tree item and descendants for the Victim UIC field.

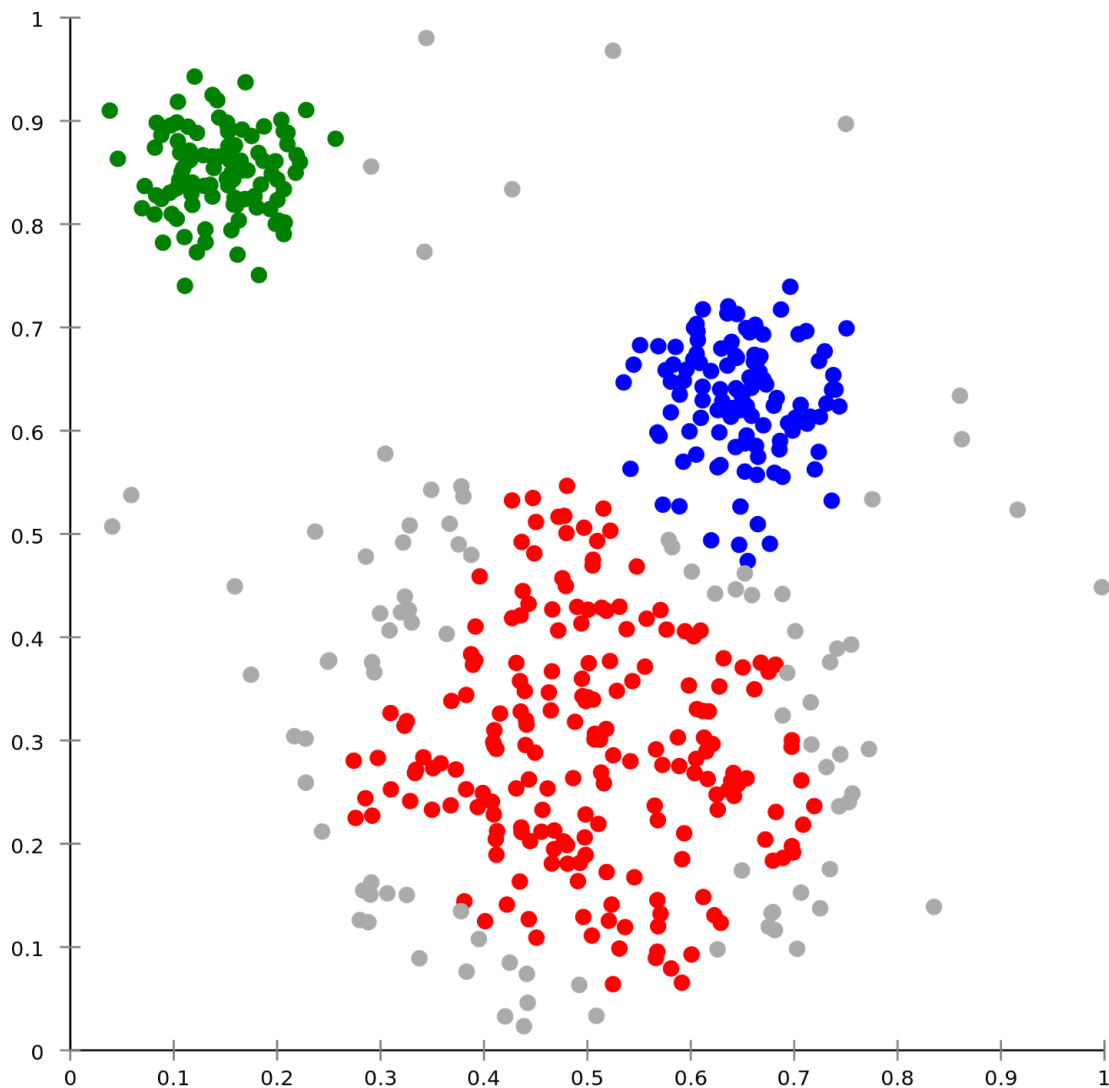


You can always add additional filters, though. For example, we could add a new filter that also limits access to only fields with a "Restricted" value of "False".

Advanced: Clustering analytics for datasets

With Datasets, Spider Impact can explore large amounts of unstructured data. With data clustering, you can unlock powerful insights by analyzing the relationships between your datasets' multiple fields. Clustering creates profiles in your data, helping you to understand the types of records most likely to show up in your dataset.

Clustering is best explained by example. Let's imagine that we have a dataset of customers, and we want to discover the types of people who buy our products. Each point on the scatter plots below represents a customer. Let's imagine that the X axis is age, and the Y axis is income.



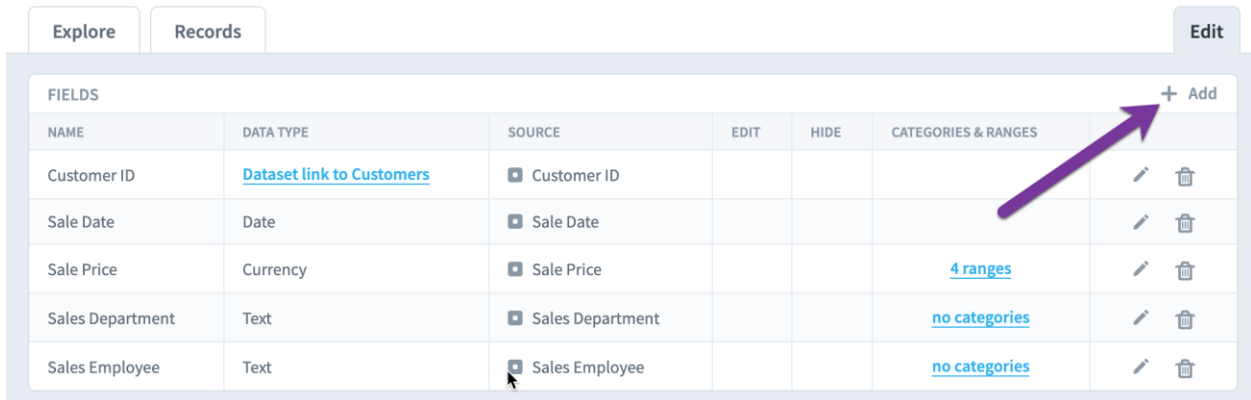
We can see that the clustering algorithm has found three clusters in the data. The three demographics of people who buy this product are young high-income people, middle-aged low-income people, and older middle-income people.

Looking at two dataset fields is interesting, but now let's imagine extending these scatter plots into a 3rd dimension by adding a Z axis. In addition to tracking age and income, let's say that we're also tracking years of formal education. By seeing points in 3-dimensional space, we could find even more interesting clusters of people. We could discover that our product is often purchased by older, higher-income people with little formal education, or middle-aged, low-income people with graduate degrees.

The human mind has trouble imagining data in more than 3 dimensions, but clustering algorithms do not. The more dimensions of data that you're able to

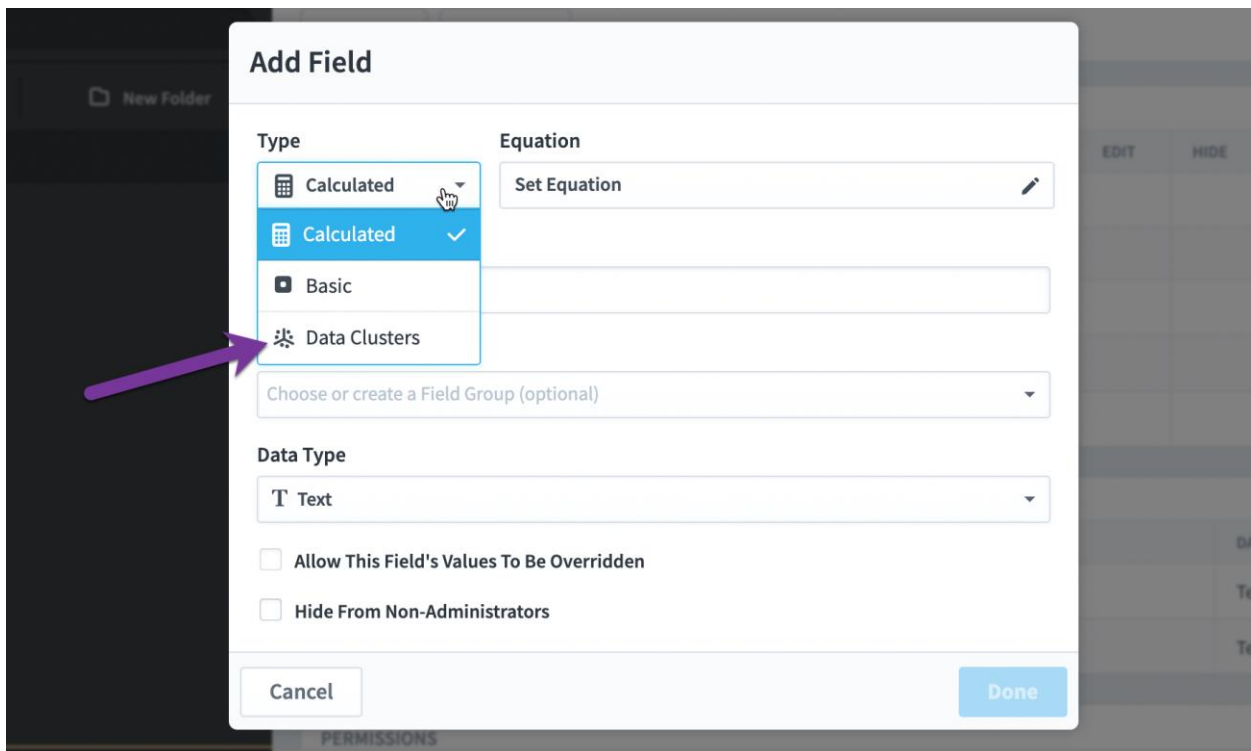
provide to Impact, the more powerful it becomes. Your datasets have dozens of fields, and there are meaningful insights to be discovered.

To create a clustering field in your dataset, click the "Add" button in the Fields table on the Edit tab.



FIELDS							+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES		
Customer ID	Dataset link to Customers	Customer ID					
Sale Date	Date	Sale Date					
Sale Price	Currency	Sale Price			4 ranges		
Sales Department	Text	Sales Department			no categories		
Sales Employee	Text	Sales Employee			no categories		

Then choose Data Clusters from the field type.



Add Field

Type: **Calculated** (selected), **Calculated** (checked), Basic, **Data Clusters** (indicated by arrow)

Equation: Set Equation

Choose or create a Field Group (optional):

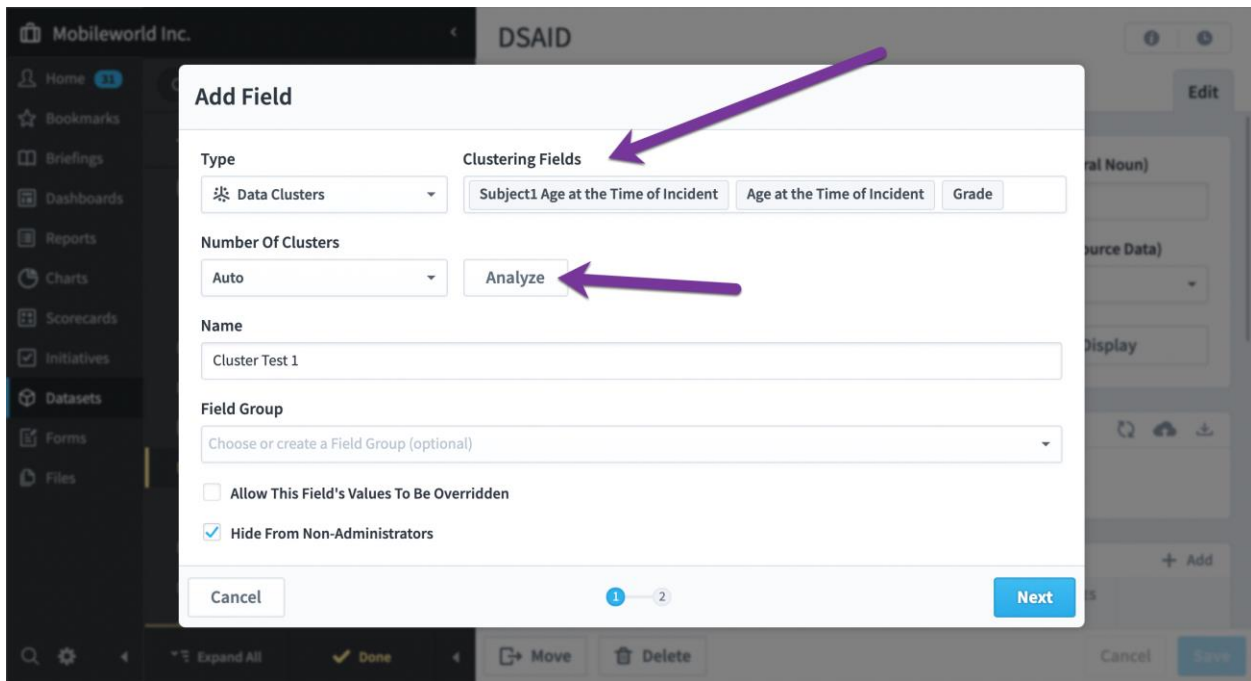
Data Type: Text

Allow This Field's Values To Be Overridden

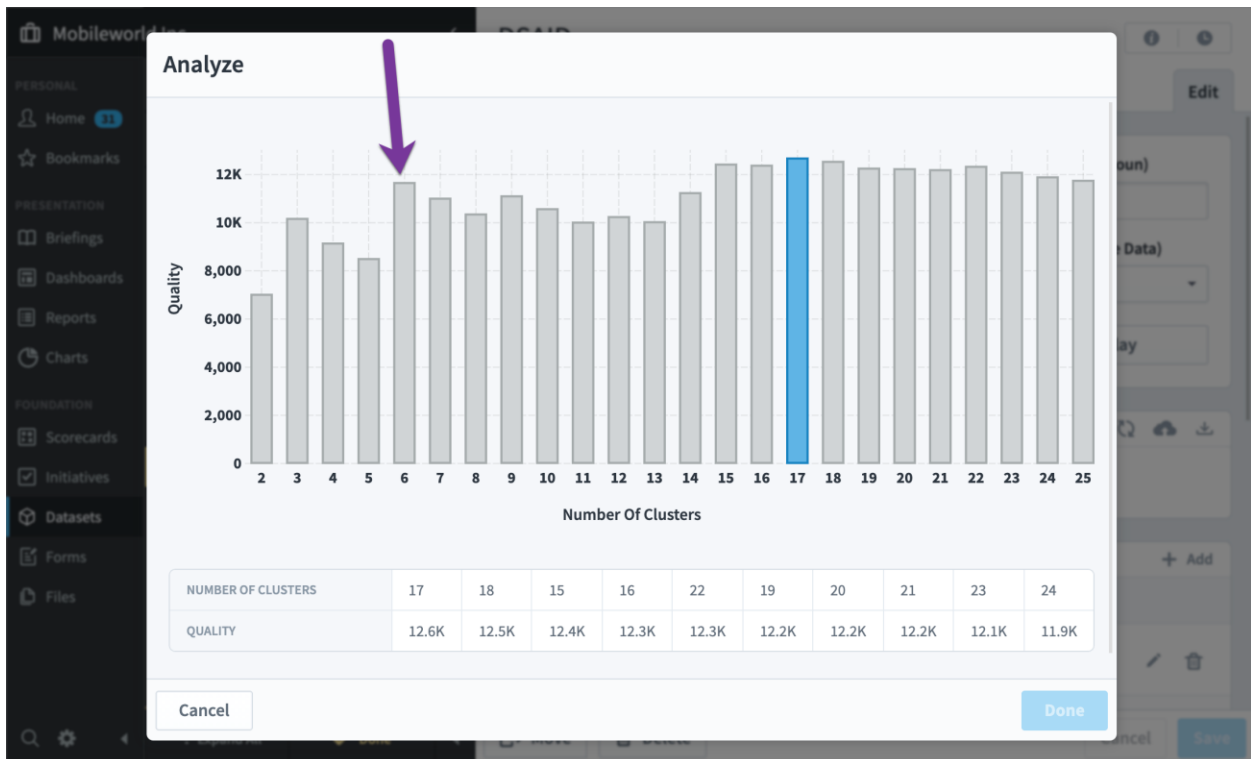
Hide From Non-Administrators

Buttons: Cancel, Done

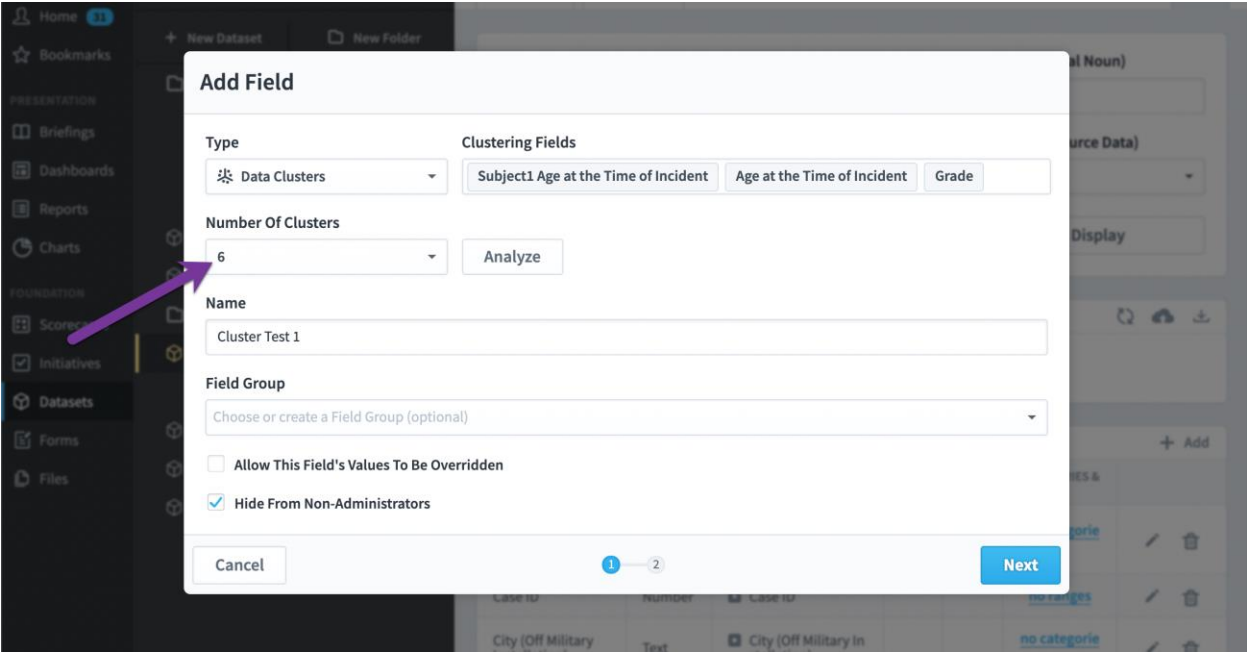
Next, choose which fields you want to cluster on and click the Analyze button.



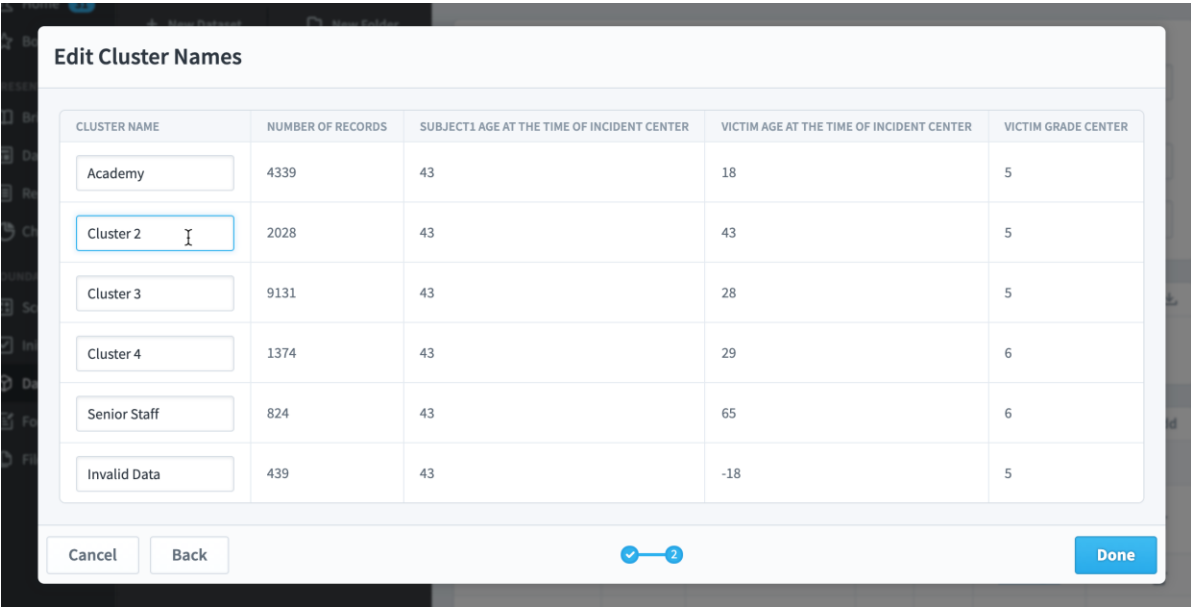
This opens a second-level dialog showing the quality of various numbers of clusters. You can see here that 17 clusters is the best fit for our data, but that 6 clusters is almost as good.



In this situation we want to go with 6 clusters to keep things simple, so we'll tell Impact that we want 6 clusters instead of "Auto".




Finally, we'll give each cluster a name based on its characteristics for each of the fields we've chosen.



We can now use our new data clusters field just like we would any other dataset field. The cluster that a record falls into is the cluster field's value. In this

example we've added the field to the Datasets Explore tab, but you can also use it in Reports, Charts, and Dashboards.



The screenshot shows two data tables. The first table, titled 'CLUSTER TEST 1', has three columns: 'CLUSTER TEST 1', 'NUMBER OF INCIDENTS', and 'INCIDENT %'. A purple arrow points to the first column header. The second table, titled 'RELATIONSHIP TO SUBJECT', has three columns: 'RELATIONSHIP TO SUBJECT', 'NUMBER OF ASSAULTS', and 'ASSAULTS %'. Below the title of the second table, there is a '< Back' button and the text 'is undefined'.

CLUSTER TEST 1	NUMBER OF INCIDENTS	INCIDENT %
Young Recruits	1,992	41%
Academy	1,799	37%
Senior Staff	566	11.7%
Ready to Retire	279	5.7%
Promotable	217	4.5%
Other	5	0.1%

RELATIONSHIP TO SUBJECT	NUMBER OF ASSAULTS	ASSAULTS %
Acquaintance	4,858	100%

Spider Impact uses the k-means++ algorithm for clustering, and each cluster's quality is evaluated using the Calinski Harabasz index.

https://en.wikipedia.org/wiki/K-means%2B%2B#Improved_initialization_algorithm

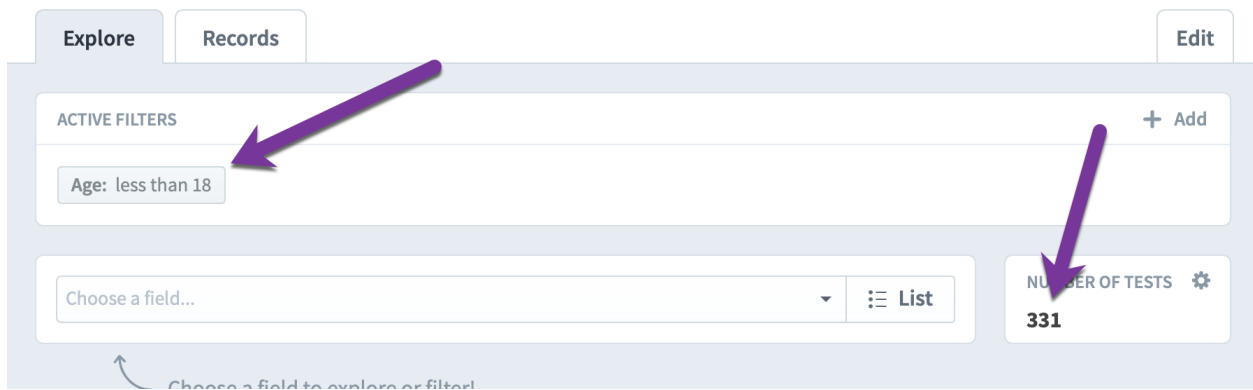
Advanced: Manually adding and updating records

Datasets are mostly about visualizing and exploring aggregated data. For users with the correct permissions, however, it can also be helpful to view the details of individual records. That's what's covered in this section.

There are also special circumstances when you'll want to override dataset values that you've imported, or create entirely new records that don't exist in your data source. It's almost always better to change the data at the source, so overriding values in Impact should only be used when that's not possible.

The Records tab

On the Datasets Explore tab, we've applied an "Age is less than 18" filter and there are 331 matching results.

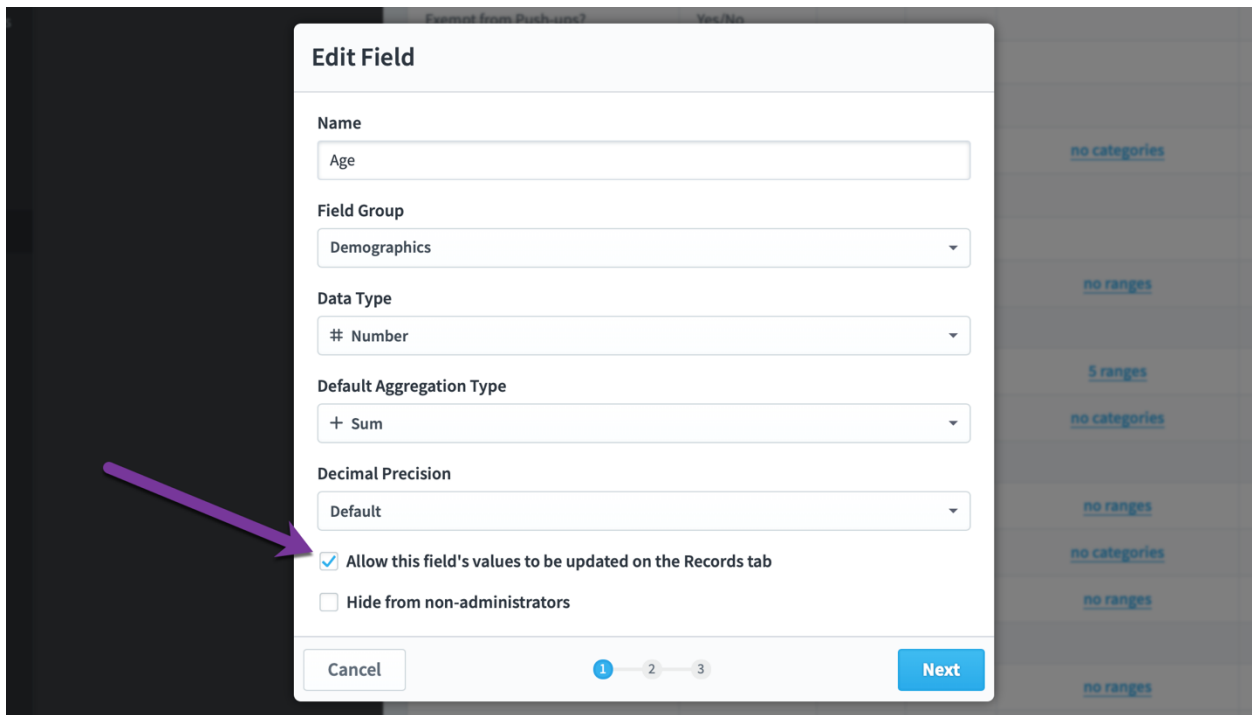


With the correct permissions, I can click to the Records tab to see the raw data.

AGE	ALTERNATE EVENT GO?	ALTERNATE EVENT NAME	ALTERNATE EVENT?	BCT SCORING?	CHAIN OF COMMAND	EXEMPT FROM PUSH-UPS?	EXEMPT FROM SIT-UPS?	FOR RECORD?	GENDER	PASS TEST?
17			No	No		No	No	Yes	M	No
17			No	Yes		No	No	No	M	No
17			No	No	Headquarters and Headquarters Detachment 484th	No	No	Yes	F	Yes

Editing record values

By default, records' values can't be changed in datasets. When editing a field, however, you can allow values to be overridden on the records tab.



When one or more fields are editable and you have the correct permissions, you can click on a record.

Explore Records Edit

ACTIVE FILTERS + Add

There are no Active Filters

RECORDS (1,000 OF 333,000)

AGE	ALTERNATE EVENT GO?	ALTERNATE EVENT NAME	ALTERNATE EVENT?	BCT SCORING?	CHAIN OF COMMAND	EXEMPT FROM PUSH-UPS?	EXEMPT FROM SIT-UPS?	FOR RECORD?	GENDER	ID
25			No	No	CIVIL AFFAIRS COMPANY, CIVIL AFFAIRS BATTALION	No	No	Yes	M	100
26			No	No		No	No	No	F	
28	Yes	2.5 MILE WALK	Yes	No		No	No	Yes	M	100

This shows a dialog where you can override record values. Datasets will remember the values you enter, even after new data is imported into your dataset.

Edit Record

Age EDITED UNDO

Gender UNDO

Explore **Records** Edit

ACTIVE FILTERS + Add

There are no Active Filters

RECORDS (1,000 OF 333,000)

Age, Gender	ALTERNATE EVENT GO?	ALTERNATE EVENT NAME	ALTERNATE EVENT?	BCT SCORING?	CHAIN OF COMMAND	EXEMPT FROM PUSH-UPS?	EXEMPT FROM SIT-UPS?	FOR RECORD?	GENDER	ID
E 99			No	No		No	No	No	M	
25			No	No	CIVIL AFFAIRS COMPANY, CIVIL	No	No	Yes	M	100

Note that you can only make a field editable when you have a primary key defined for your dataset. That's because the software needs to be able to uniquely identify the record that is being changed so that the same change will be made after you import data again later.

Explore **Records** Edit

Name What Does The Dataset Track?

Default App Calendar Field Primary Key (From Source Data)

Allow new records to be added on the Records tab

Adding new records

When editing a dataset, you can allow entirely new records to be added.

Explore Records Edit

Name: Fitness Tests

What Does The Dataset Track?: Tests

Default App Calendar Field: None (Show all time)

Primary Key (From Source Data): ID

Allow new records to be added on the Records tab

Defaults for Total Display

When enabled, there is an Add button on the Records tab.

Explore Records Edit

ACTIVE FILTERS + Add

There are no Active Filters

RECORDS (1,000 OF 333,000) + Add

AGE	ALTERNATE EVENT GO?	ALTERNATE EVENT NAME	ALTERNATE EVENT?	BCT SCORING?	CHAIN OF COMMAND	EXEMPT FROM PUSH-UPS?	EXEMPT FROM SIT-UPS?	FOR RECORD?	GENDER	ID
99			No	No		No	No	No	M	100
					CIVIL AFFAIRS COMPANY CIVIL					

Add Record

Age: Age

Alternate Event Go?:

Alternate Event Name:

Alternate Event?:

BCT Scoring?:

Chain Of Command: Clear

Exempt From Push-Ups?:

Cancel Save

Just like editing records, added records will be preserved even after future data is imported into the dataset.

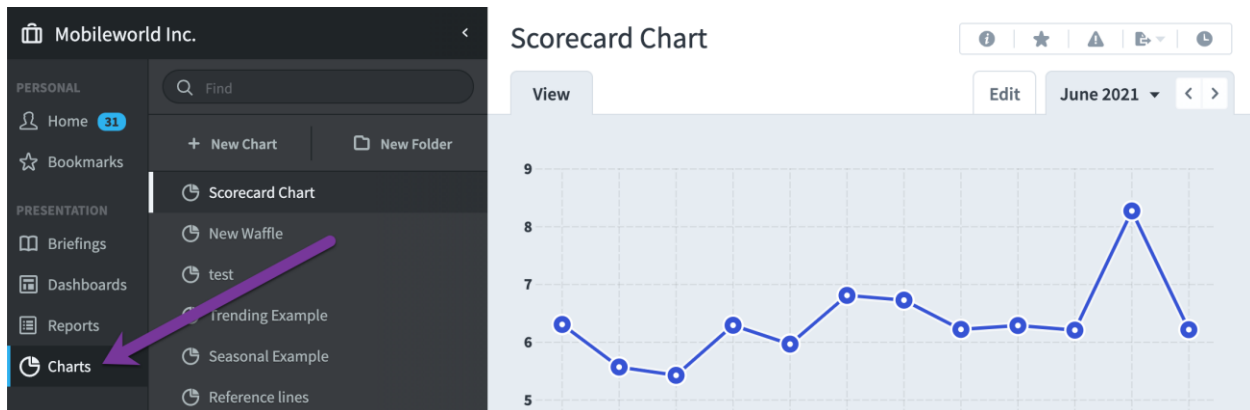
The screenshot shows a software interface with a dark sidebar on the left containing a 'New Folder' button. The main area has two tabs: 'Explore' and 'Records'. An 'Edit' button is in the top right. Below the tabs is an 'ACTIVE FILTERS' section with a '+ Add' button and a filter 'ID: is 123'. Below that is a 'RECORDS (1)' section with a '+ Add' button. A table with the following columns is visible: ALTERNATE EVENT NAME, ALTERNATE EVENT?, BCT SCORING?, CHAIN OF COMMAND, EXEMPT FROM PUSH-UPS?, EXEMPT FROM SIT-UPS?, FOR RECORD?, GENDER, ID, and P/T. The first row of the table has the value '19' in the ID column. A tooltip titled 'New Record' with the text 'This record was created on the Records tab' points to the '19' in the ID column. A purple arrow also points to the '19'.

ALTERNATE EVENT NAME	ALTERNATE EVENT?	BCT SCORING?	CHAIN OF COMMAND	EXEMPT FROM PUSH-UPS?	EXEMPT FROM SIT-UPS?	FOR RECORD?	GENDER	ID	P/T
								19	

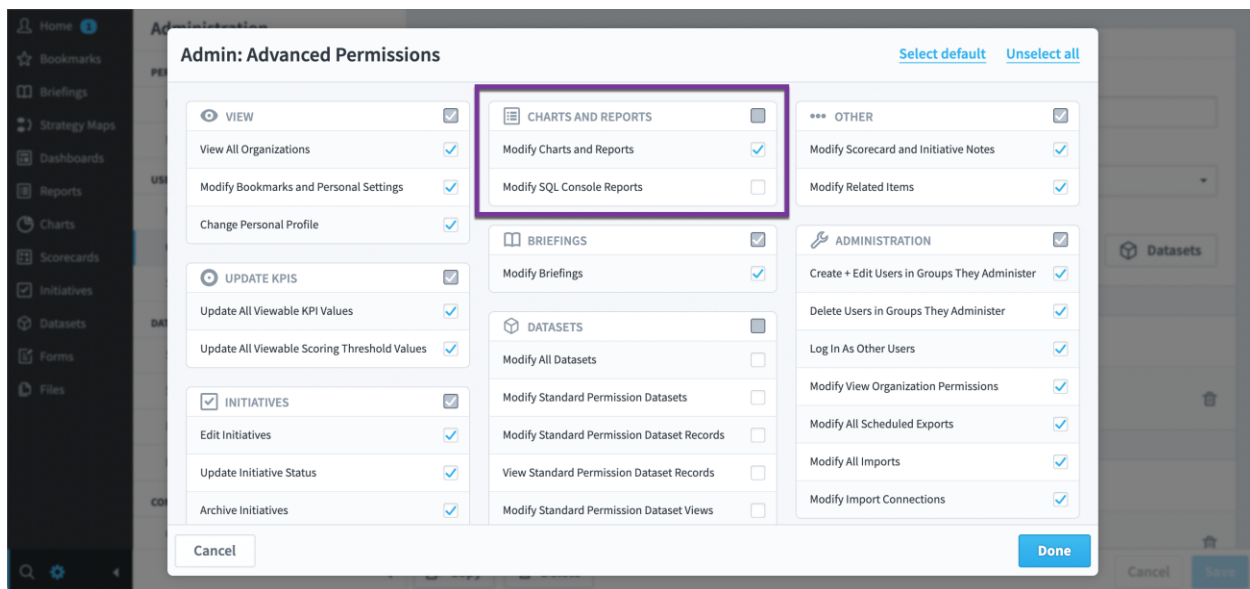
Charts

The Charts section

Charts are significantly more powerful in Spider Impact 5. Because of this, charts now have their own application section that is separate from Reports.

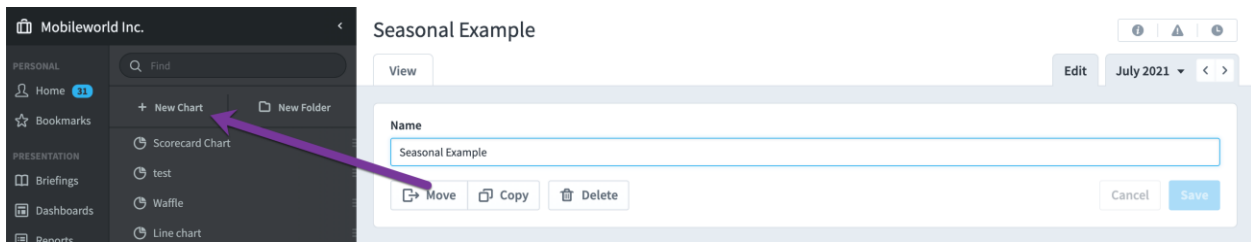


Charts and Reports continue to share the same modification permissions.

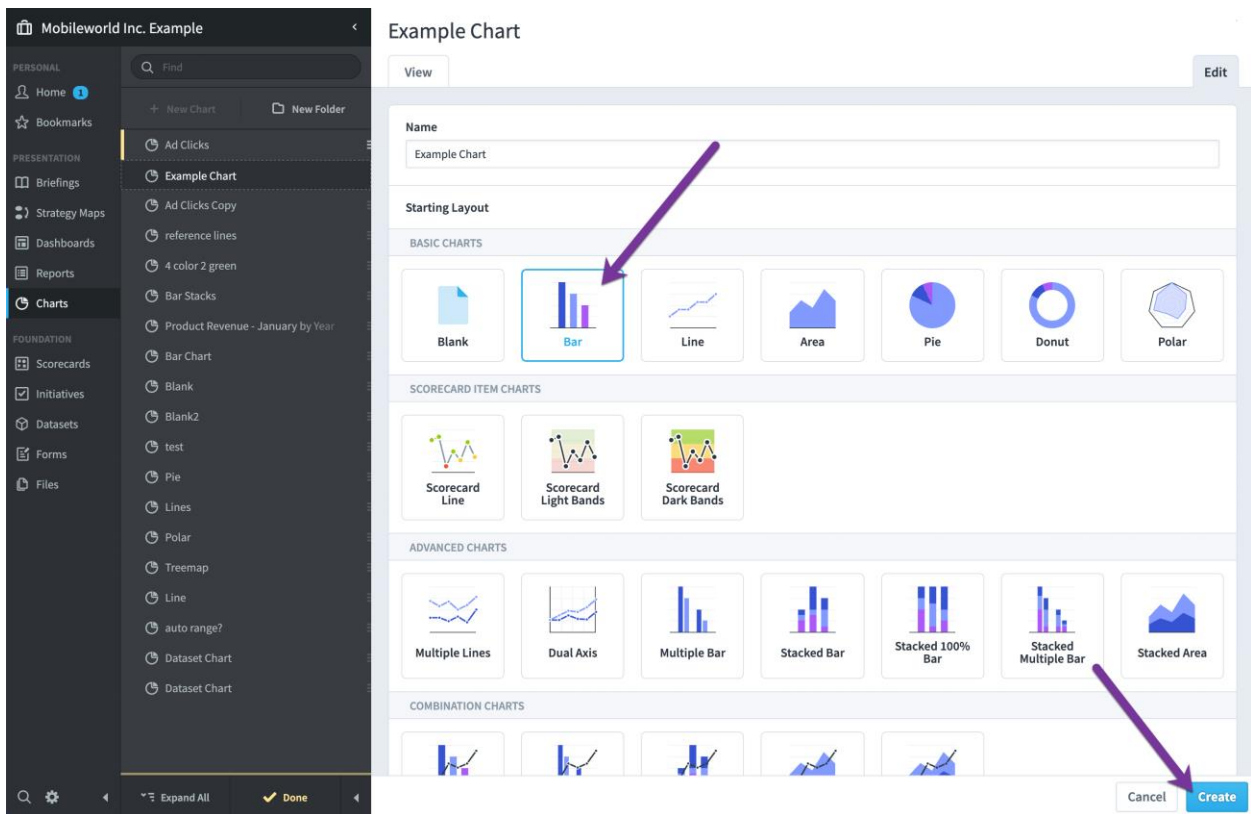


Creating a chart

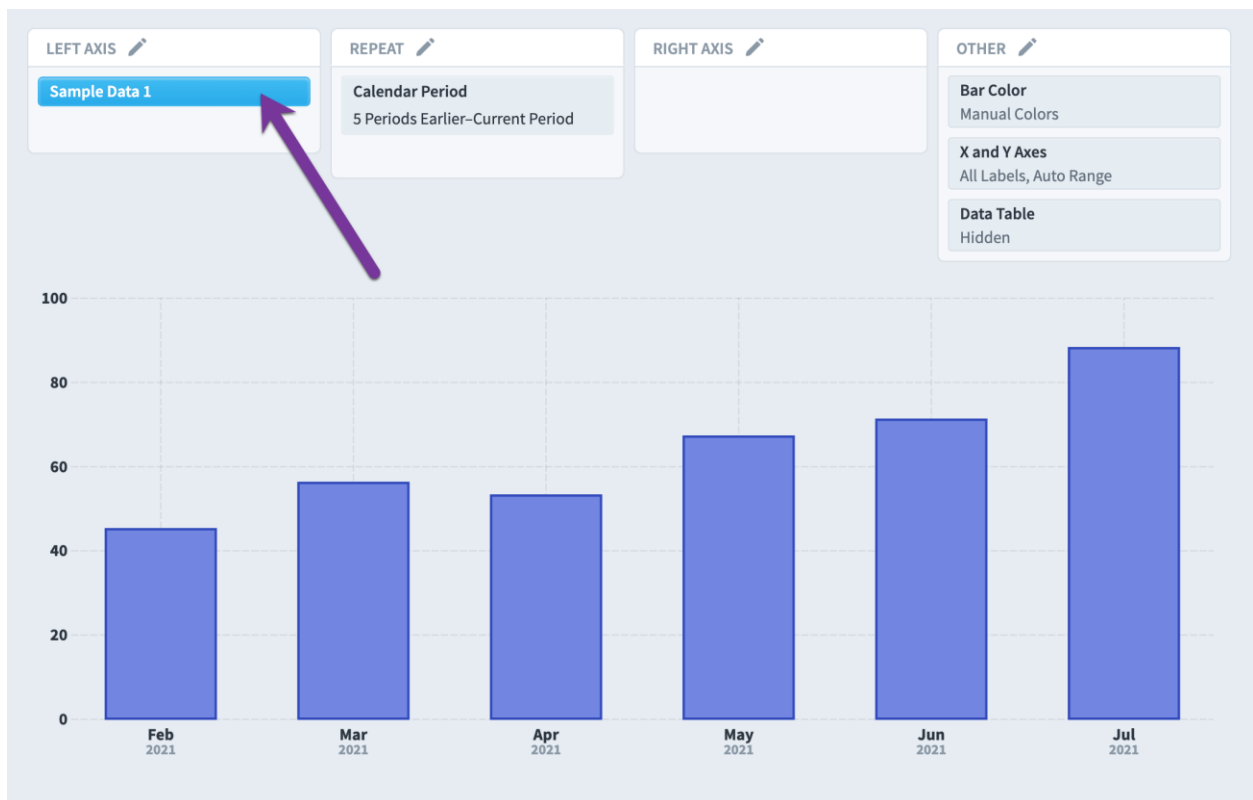
To create a chart, click the "New Chart" button.



From here you can name your new chart and decide what it should look like. The default chart type is Blank, but you can choose from a wide variety of example charts to get you started.

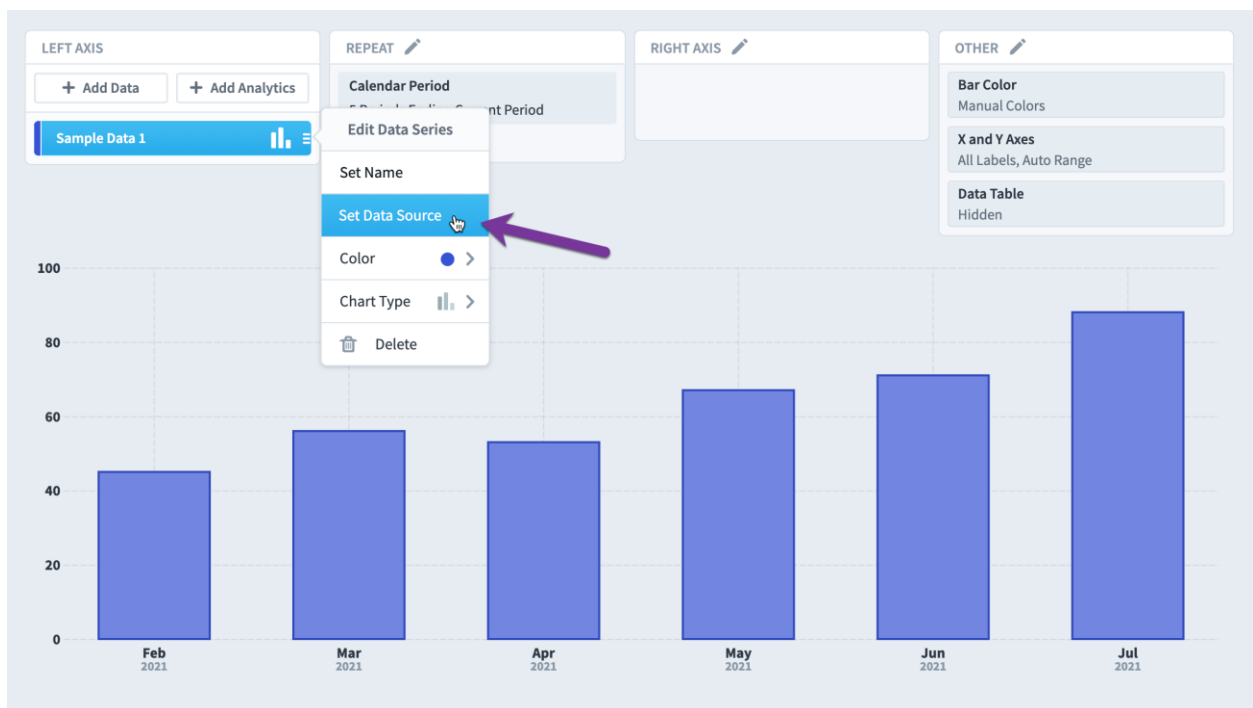


If you choose a pre-built chart example, you'll see a fully finished version of your chart with sample data. This allows you to build visualizations based on how they look rather than focusing on getting the data exactly right from the beginning. All sample data series are marked blue.

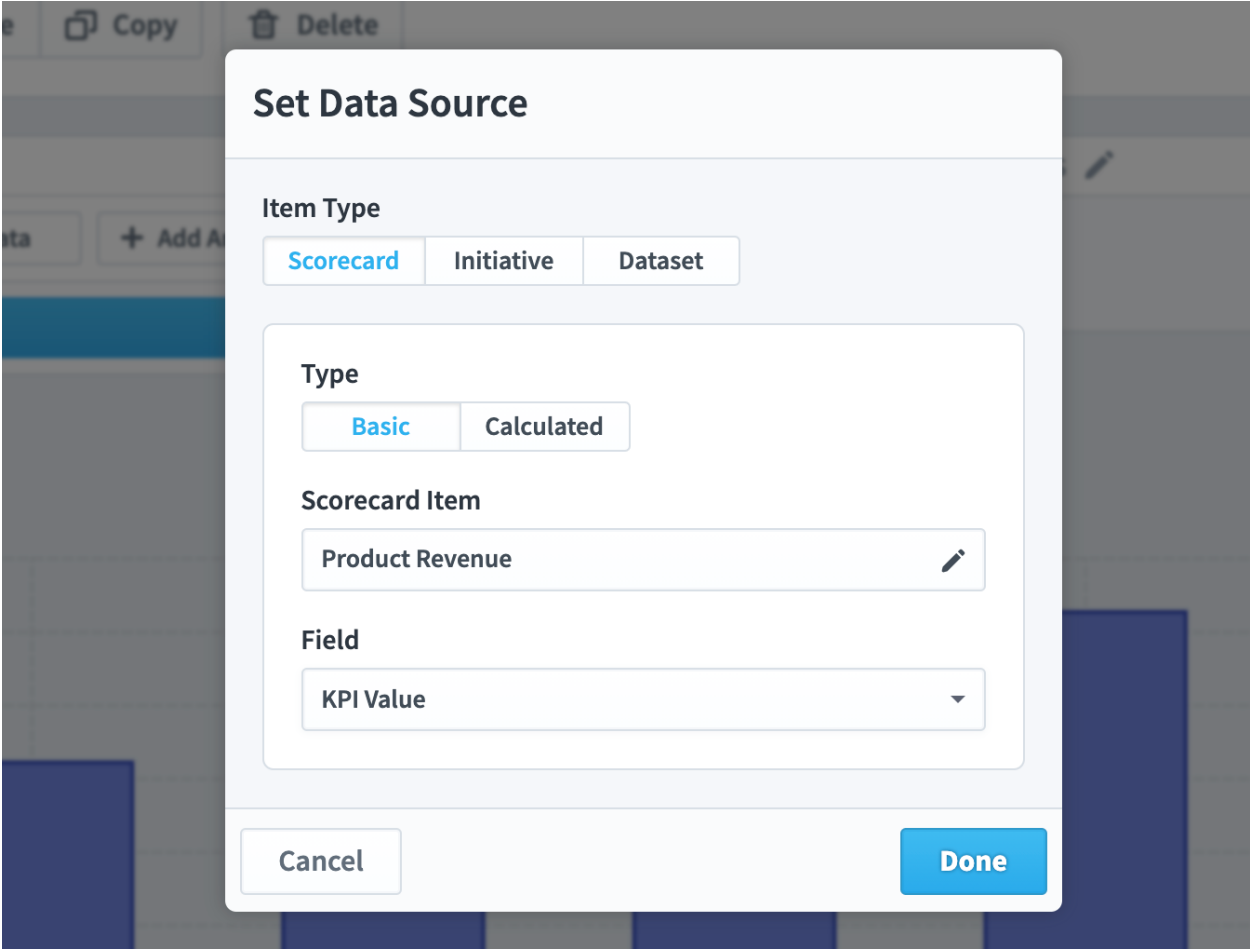


Editing chart data

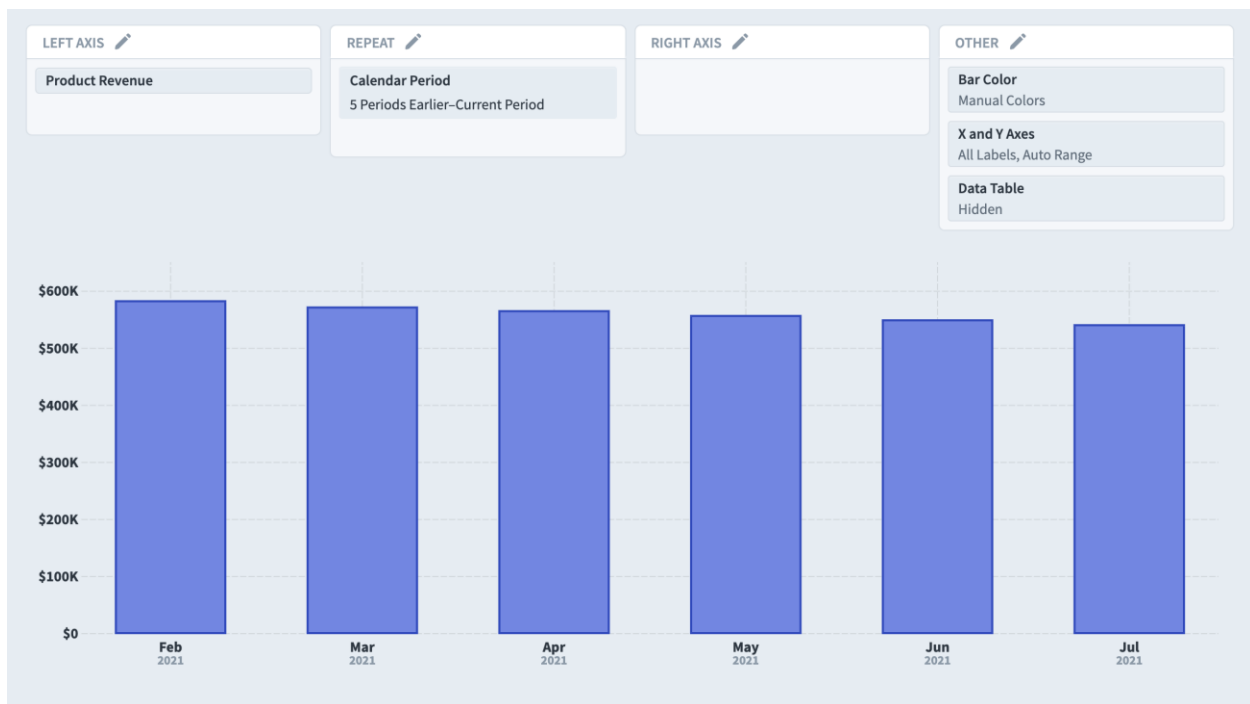
Whenever you're ready to see your own data on the chart, just edit the data source on a sample data series. In this example there's a sample bar series on the left axis, so we'll click on it and choose "Set Data Source".



This allows you to choose to show any type of data from scorecard items, initiative items, or dataset fields. We'll choose to show the KPI Value for Product Revenue.

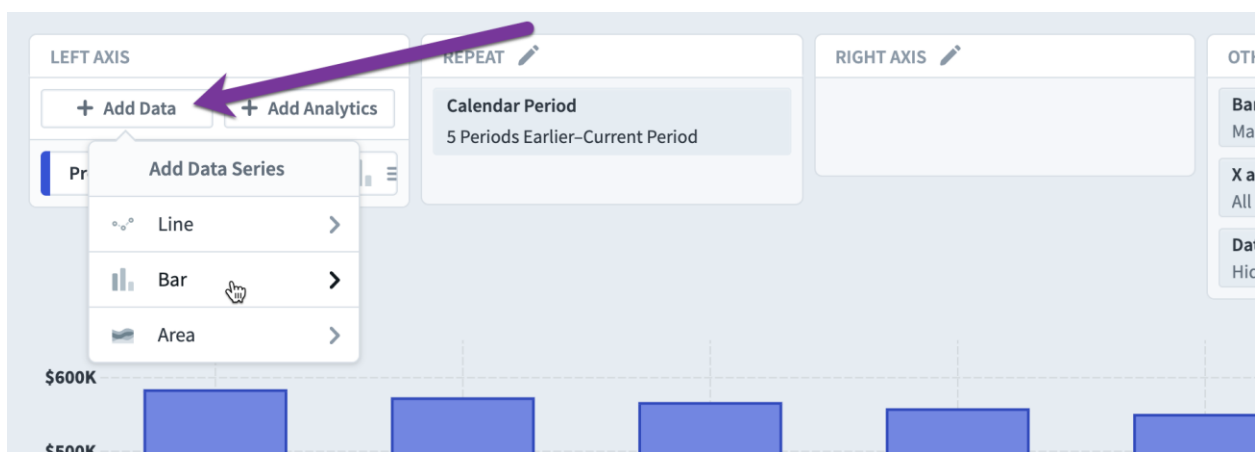


Now our chart is showing real data. All that's changed is the height of the bars.

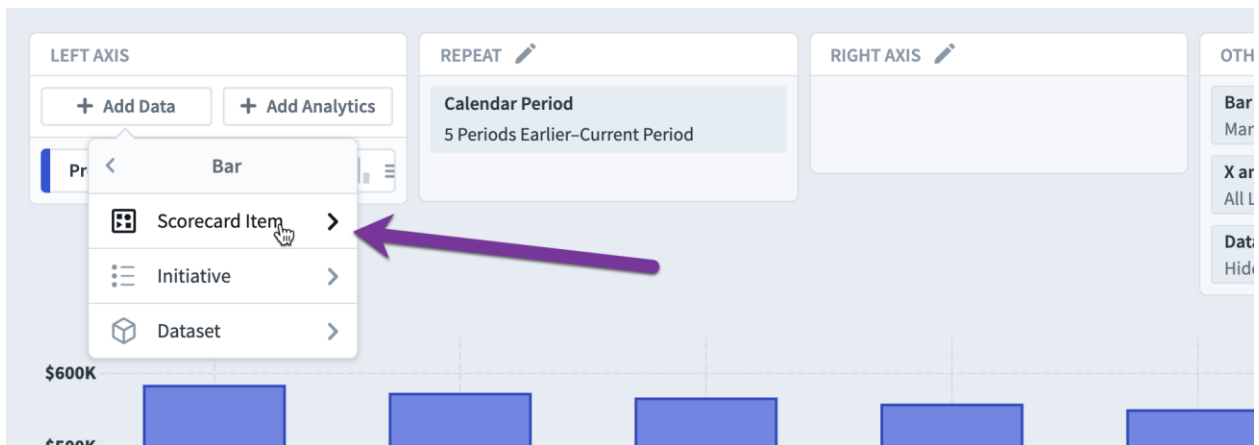


Adding chart data

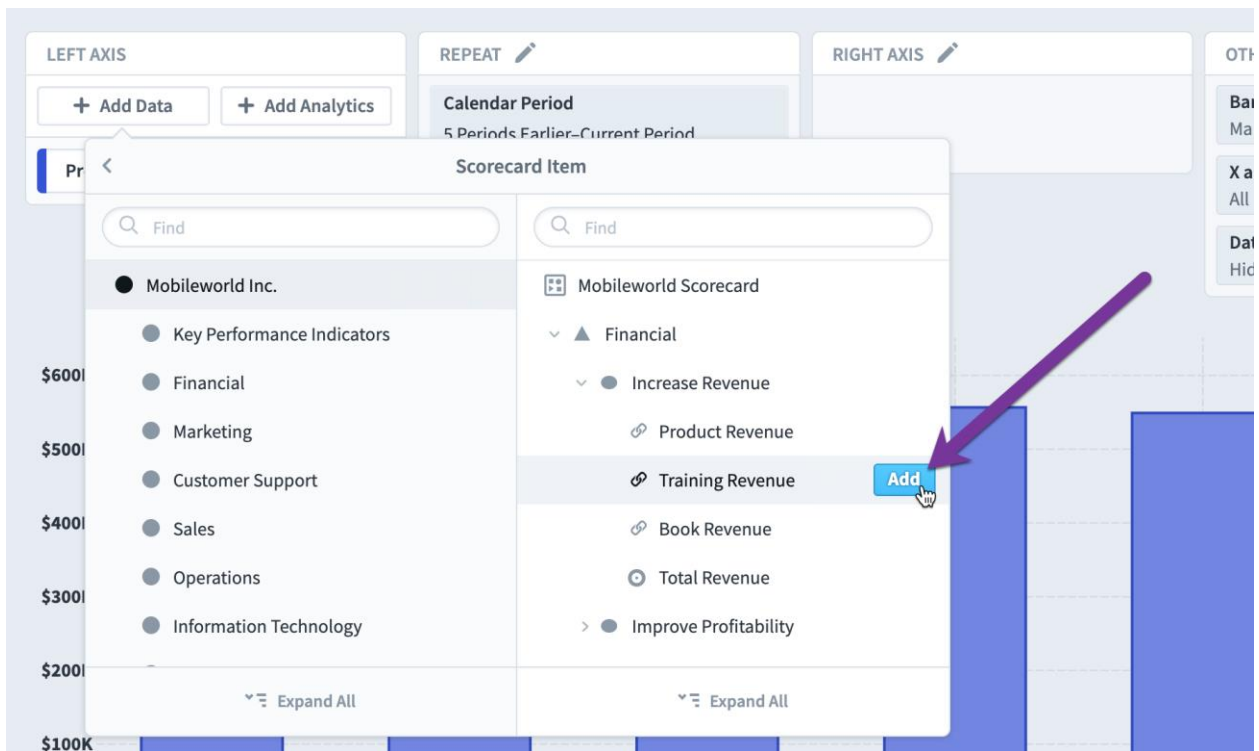
You can also add data series to your chart one at a time by clicking the "Add Data" button. Some chart types will ask what kind of data series you want. In this example the options are a new Line, Bar, or Area data series. We'll choose Bar.



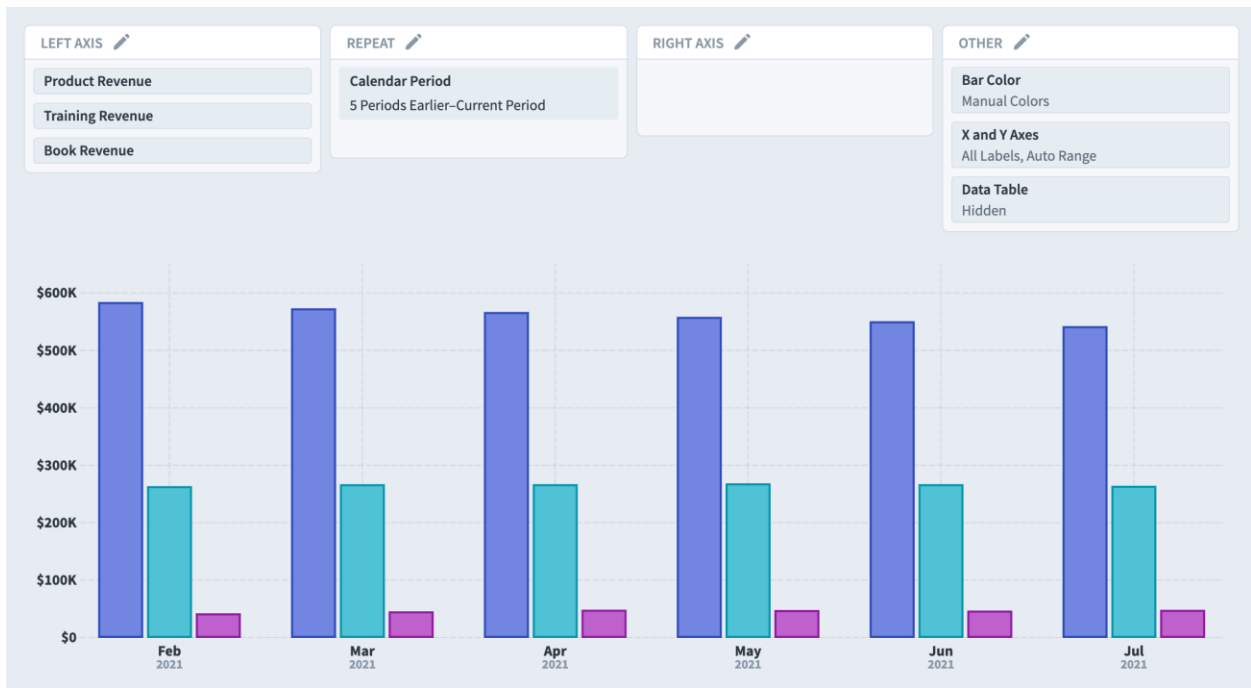
Next, choose where in Impact to get your data. You can choose a scorecard item like a KPI, an initiative, or low-level data from a dataset. We'll choose Scorecard Item.



From here you can add bars directly to the chart. Every time you click the add button, it adds a bar for that scorecard item.

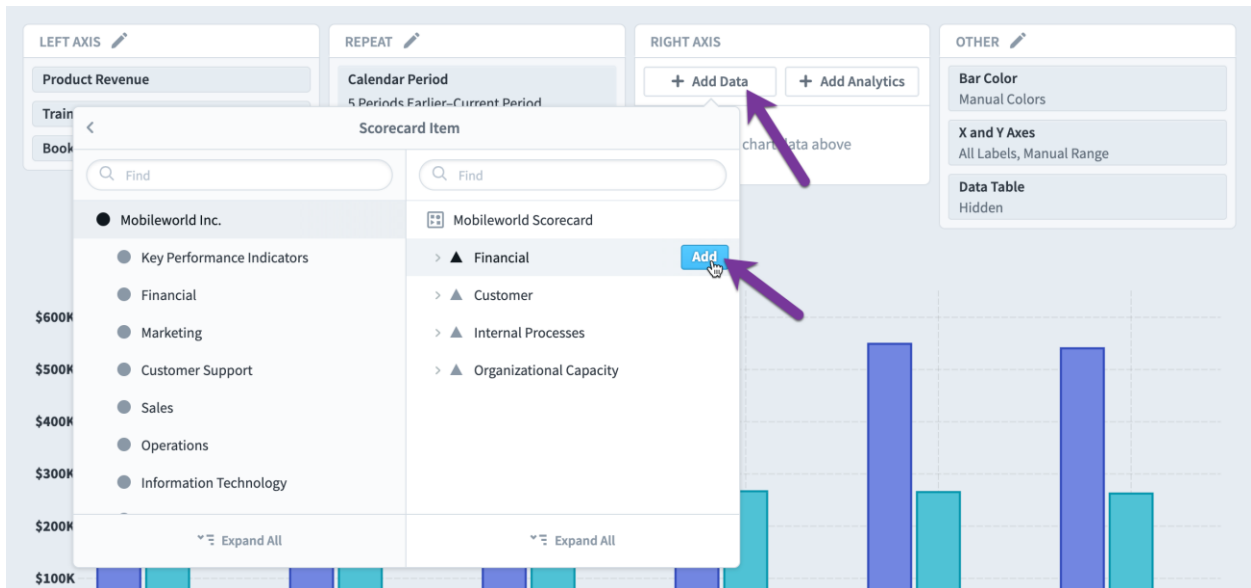


After two clicks of the Add button, we have a chart that looks like this.

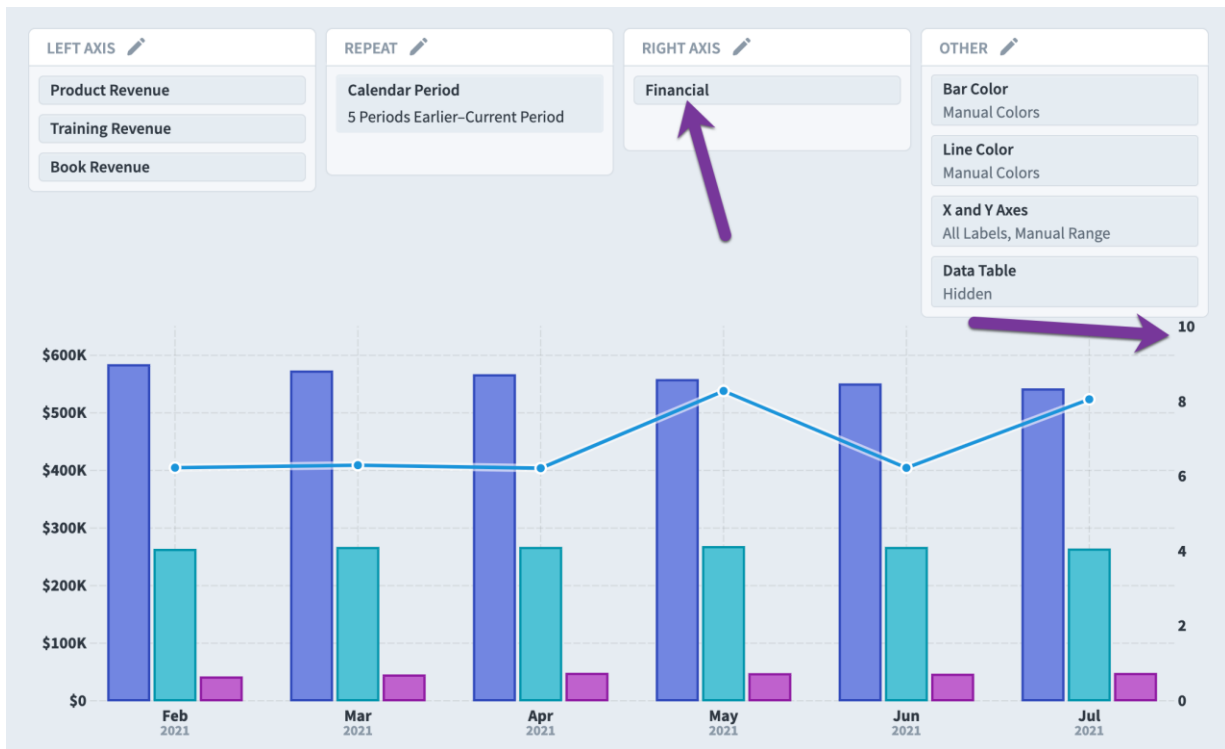


Right axis

Adding data to the right axis is exactly the same process. Here we'll add a line for a scorecard item's score.

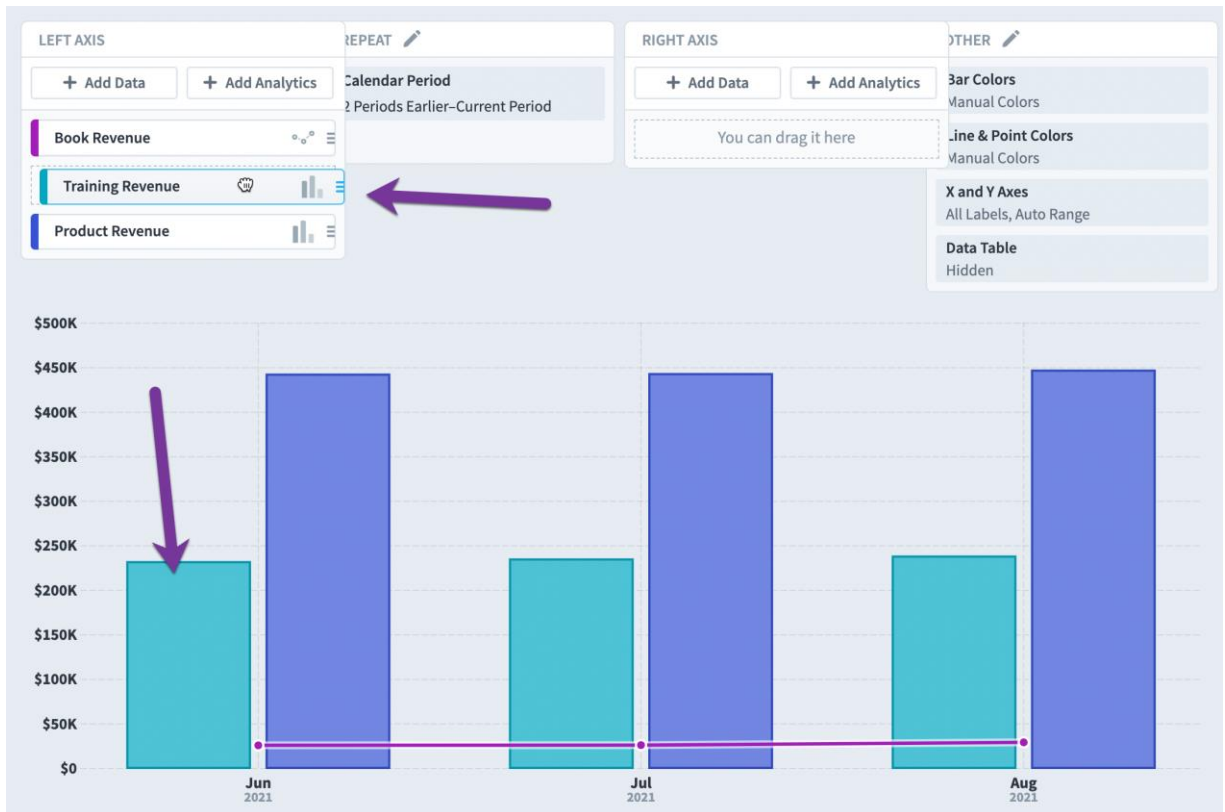


This 0-10 score line is now showing on the right axis while the three bars' \$100k+ Revenue are graphed on the left axis.

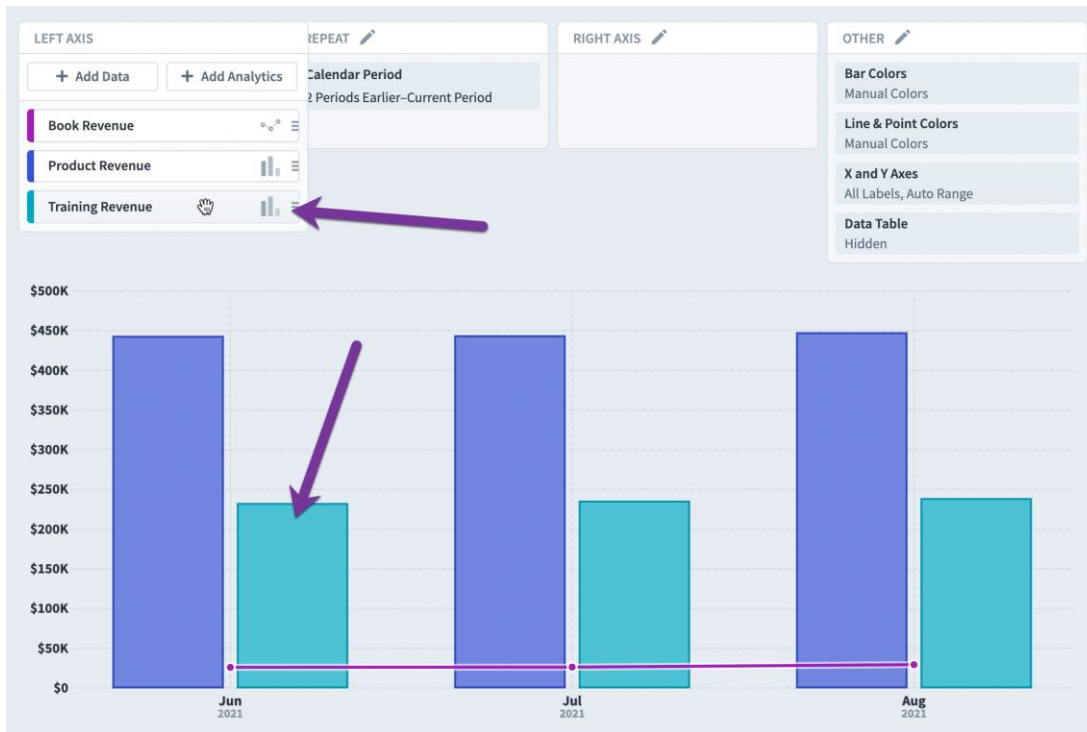


Reordering with drag and drop

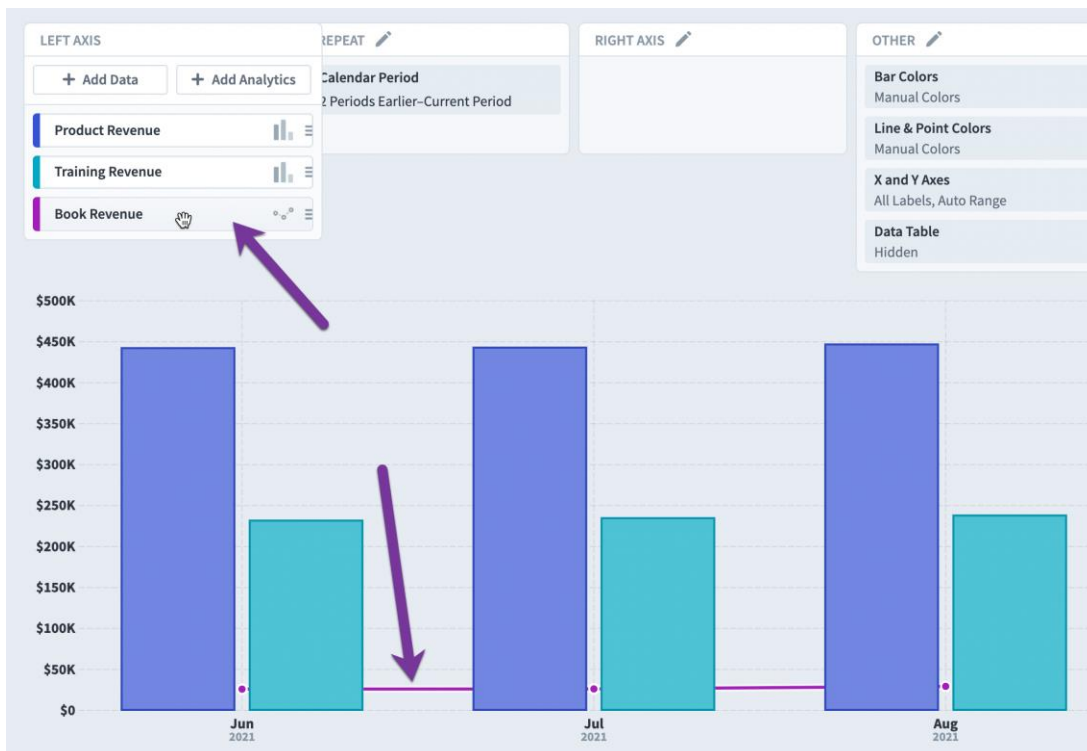
You can reorder anything on your chart by dragging and dropping. In this example, the Training Revenue bar comes before the Product Revenue bar.



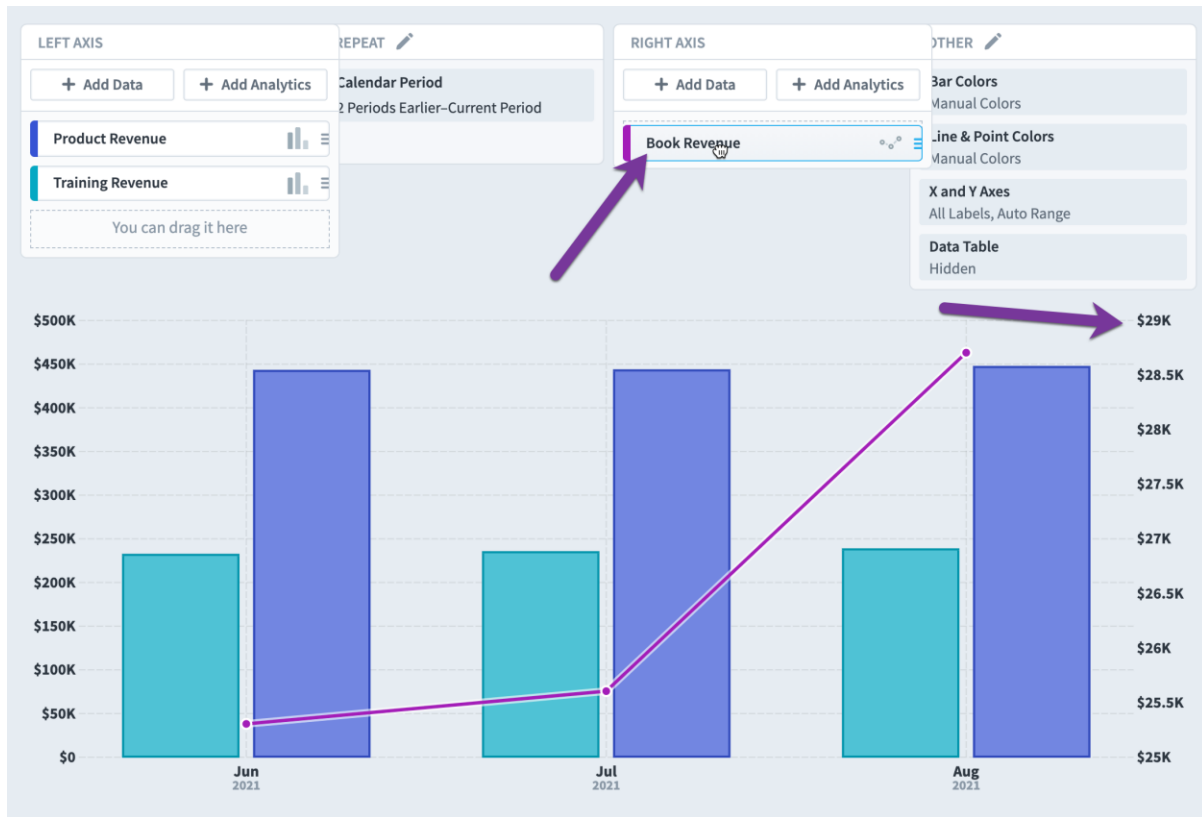
After moving Training Revenue to the bottom of the list, its bar is now on the right.



The order also affects the order above and below other items. Here we've moved the Book Revenue line to the bottom so that it's underneath the bars.

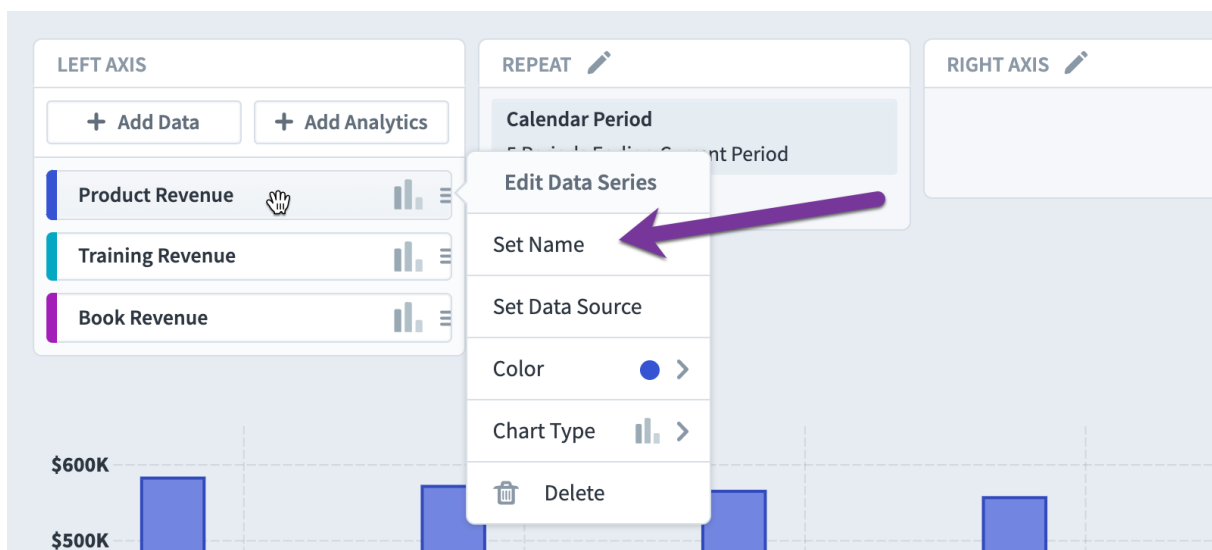


You can even drag items to the other axis. Here we've moved Book Revenue to the right axis so that it has its own scale.

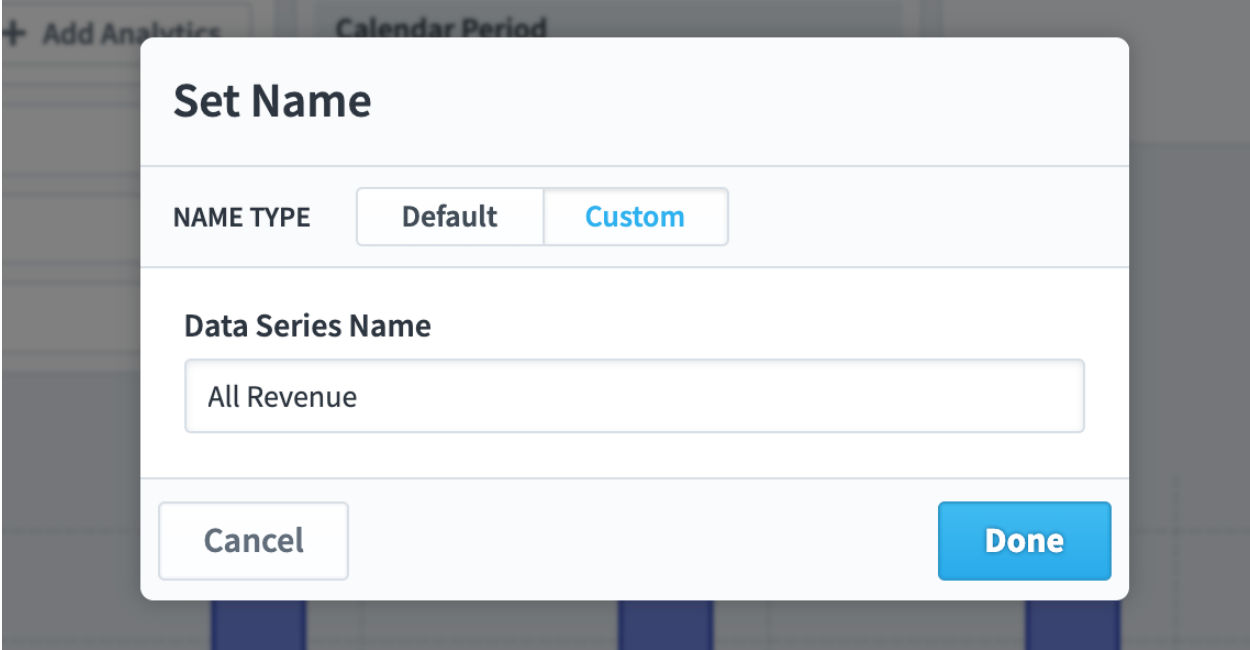


Setting data series names

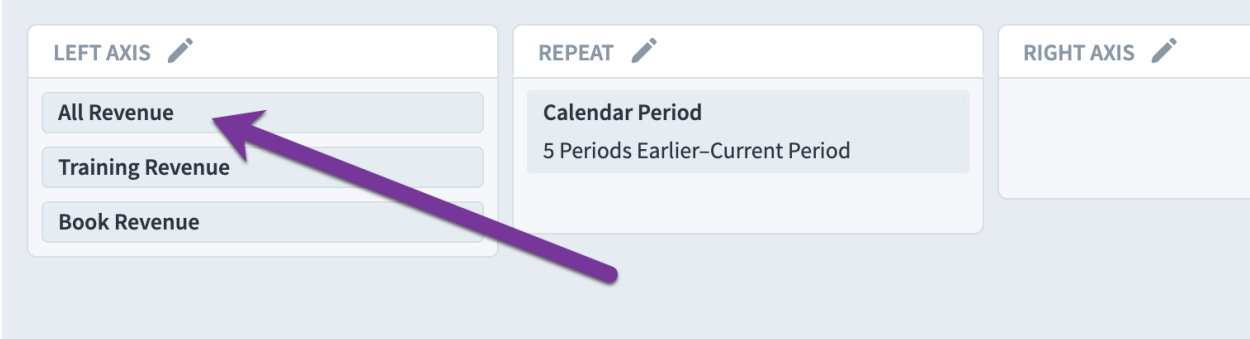
Data series names are used in various places like chart labels, tooltips, and legends. Spider Impact chooses a default name for each data series, but you can override this by choosing Set Name in the edit tooltip.



Here we've decided to change the Product Revenue scorecard item's name on the chart to All Revenue.

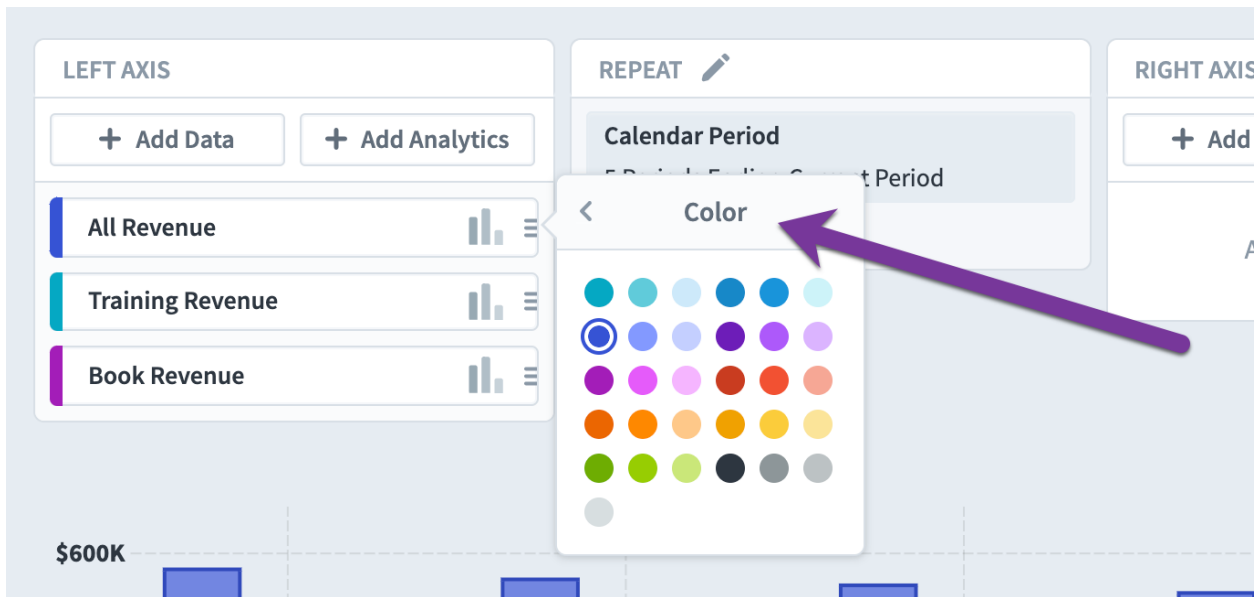


This new name is now used everywhere for that data series.

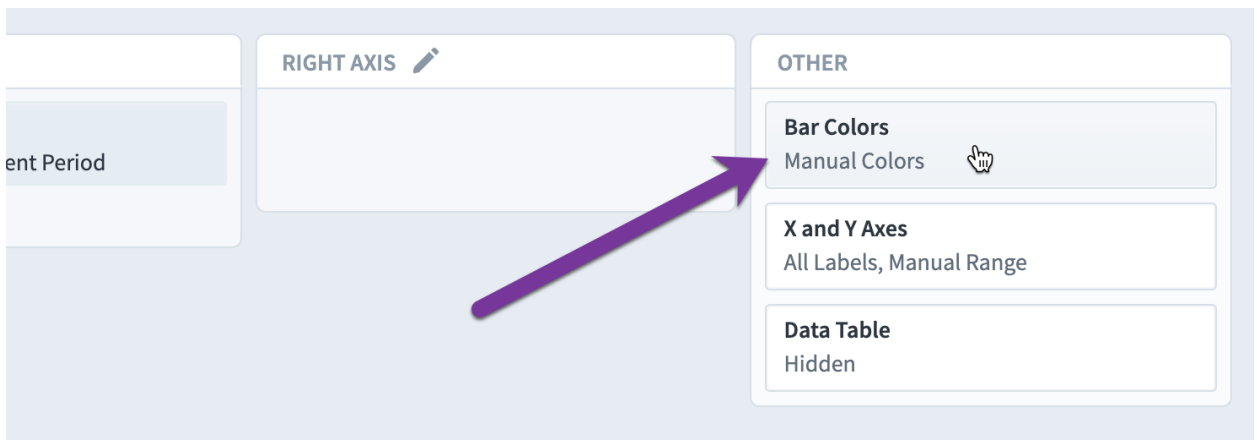


Setting colors

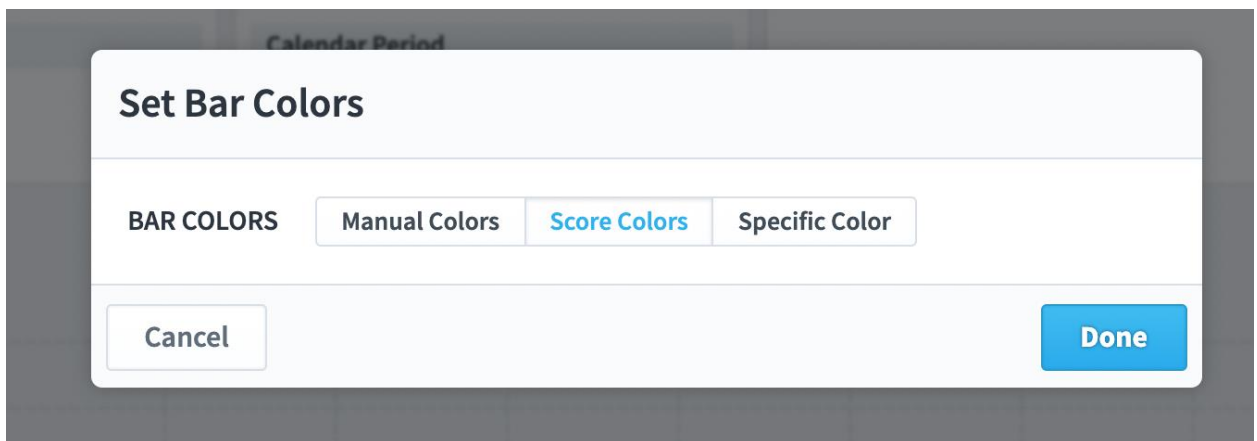
By default, chart data series use automatically assigned colors. You can also choose to manually change any automatically assigned color.



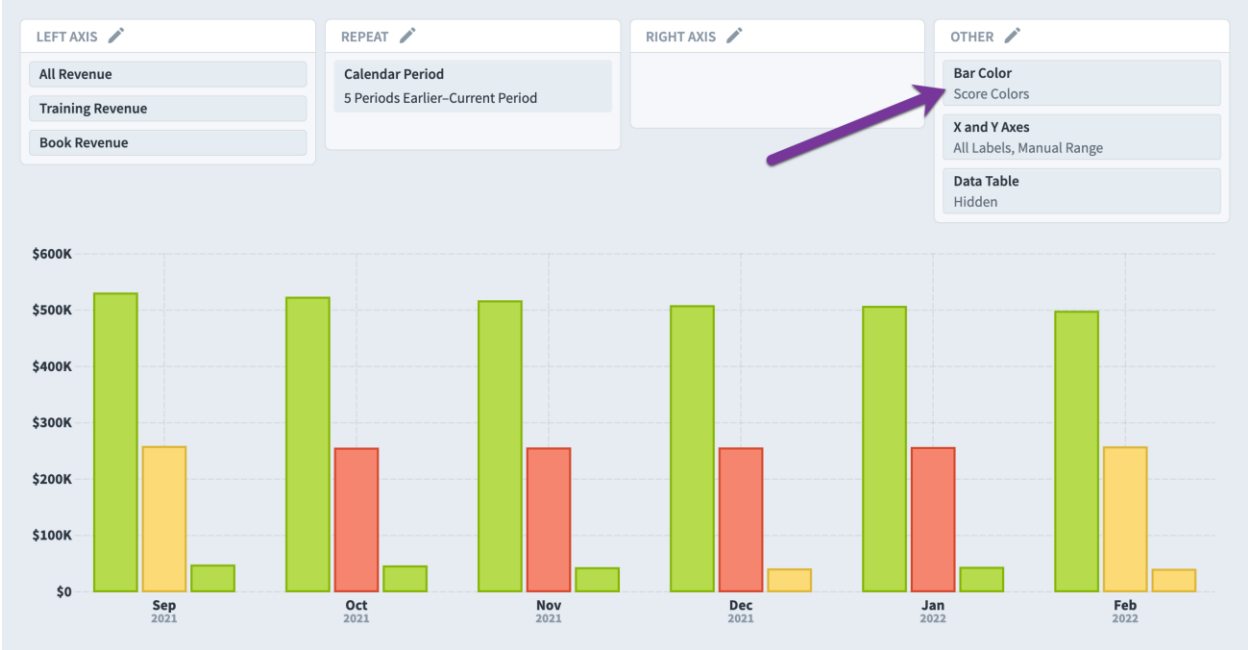
You can choose a different way to color the data series, however. In this example we're going to click on Bar Colors in the Other panel.



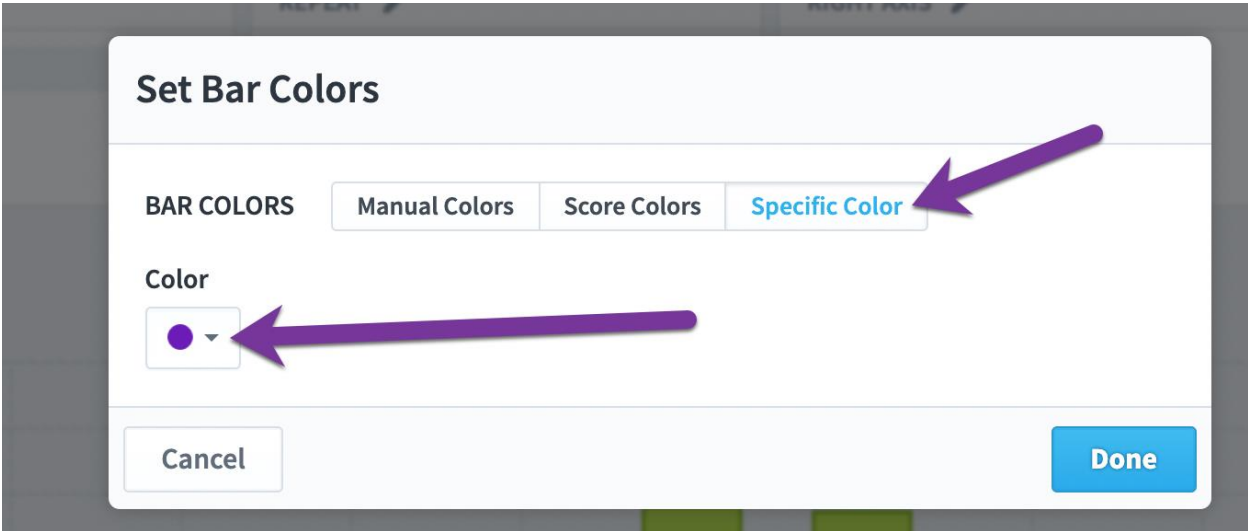
And we'll change from Manual to Score.

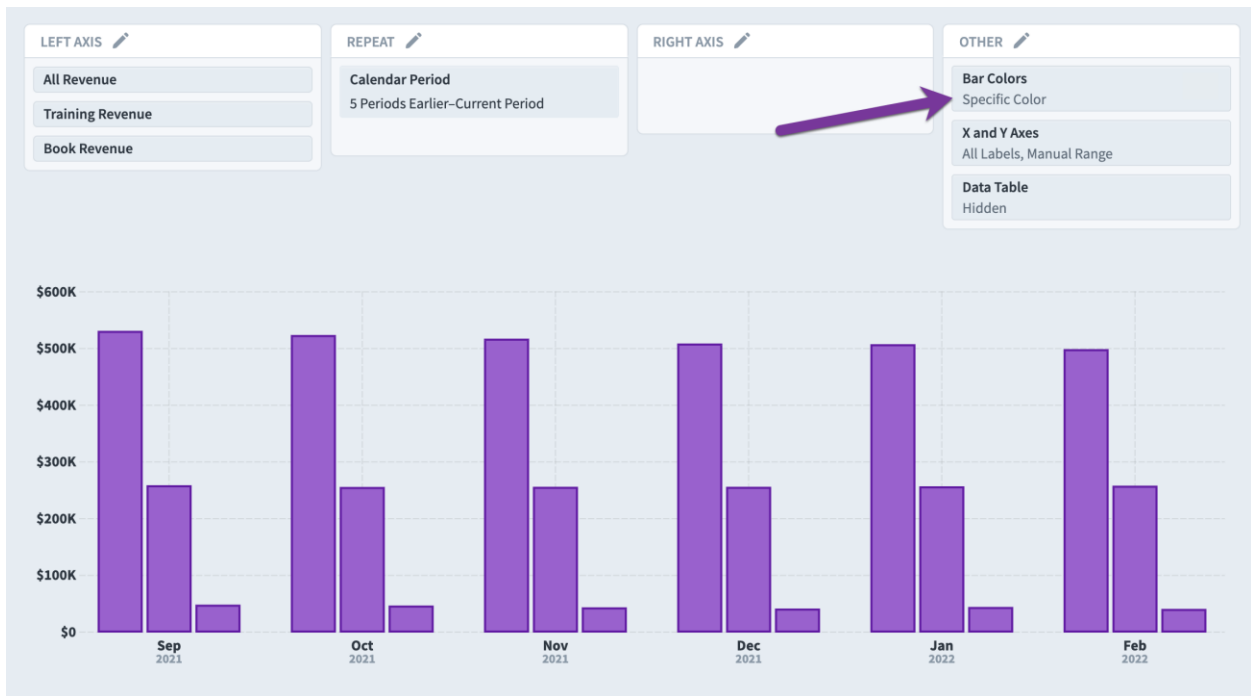


This changes the bars to be colored based on each scorecard item's score for that period.



You can also force all the bars for all data series to a single color by choosing Specific Color. This is the same as manually setting all data series to the same color individually.





X and Y axes

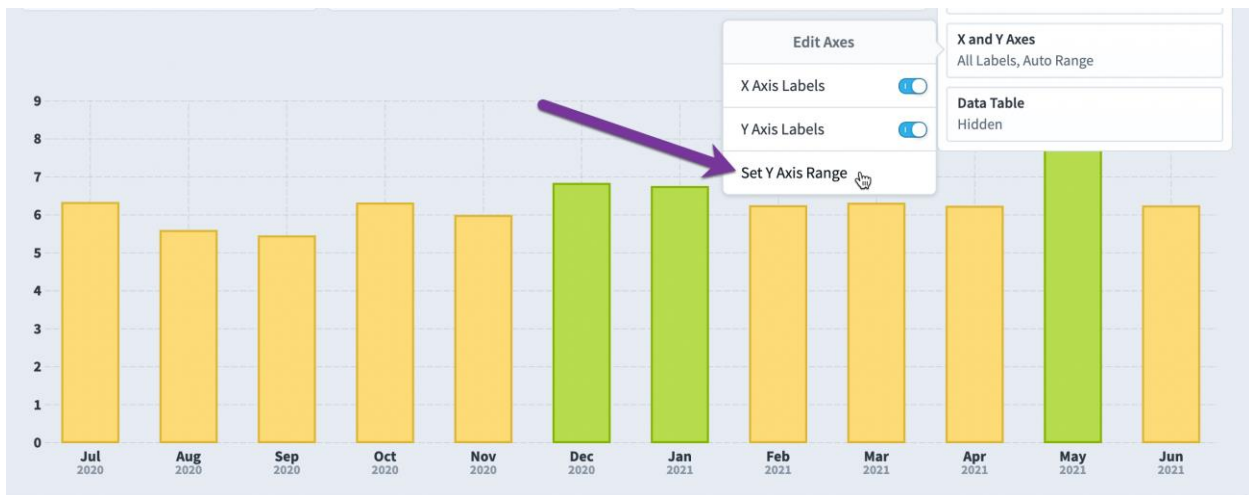
You can configure a chart's axes through the X and Y Axes box in the Other panel.



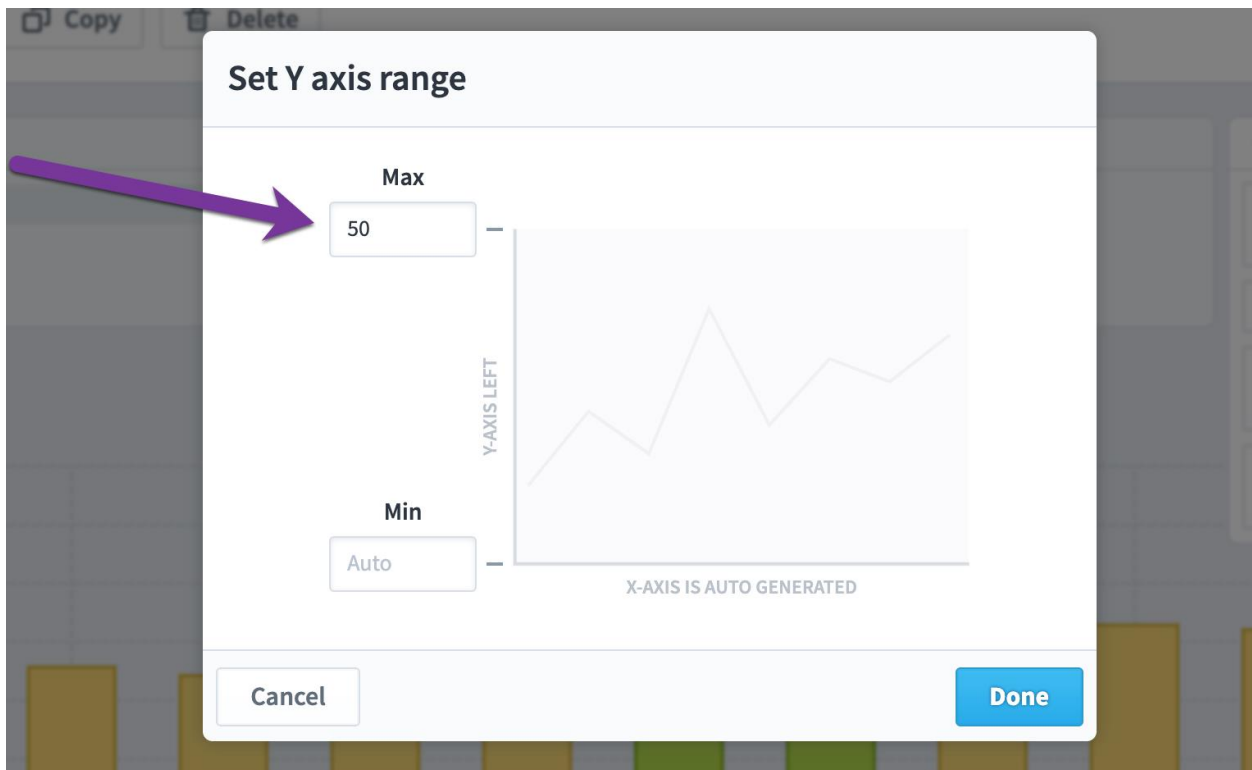
The X and Y axis labels default to on, but you can turn one or both off here.



You can also set the Y axis range.



This opens a dialog where you can choose the chart's maximum and minimum Y axis values. By default, they're automatically set, but here we're overriding the maximum value to 50.

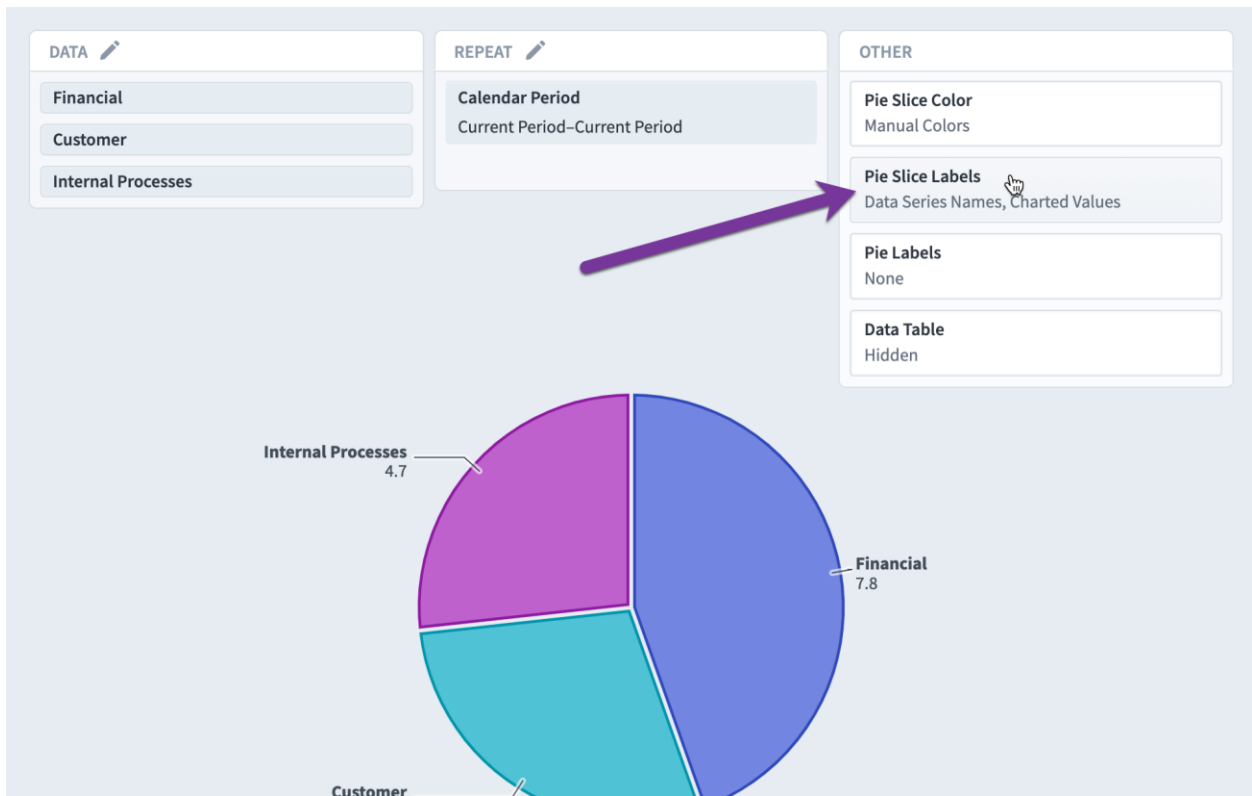


As you can see, the chart now shows a maximum value of 50, regardless of what data is being graphed.

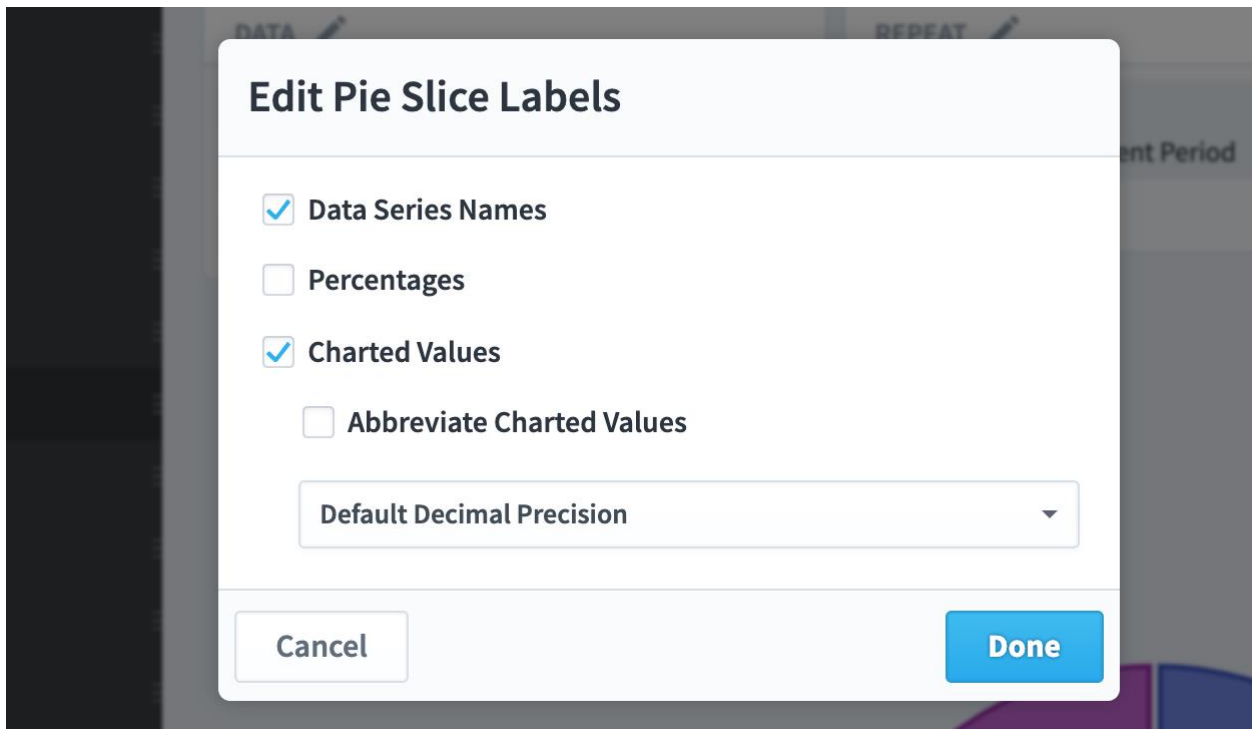


Chart labels

Most chart types have labels that you can configure. In this pie chart example, you can see a Pie Slice Labels option in the Other menu.

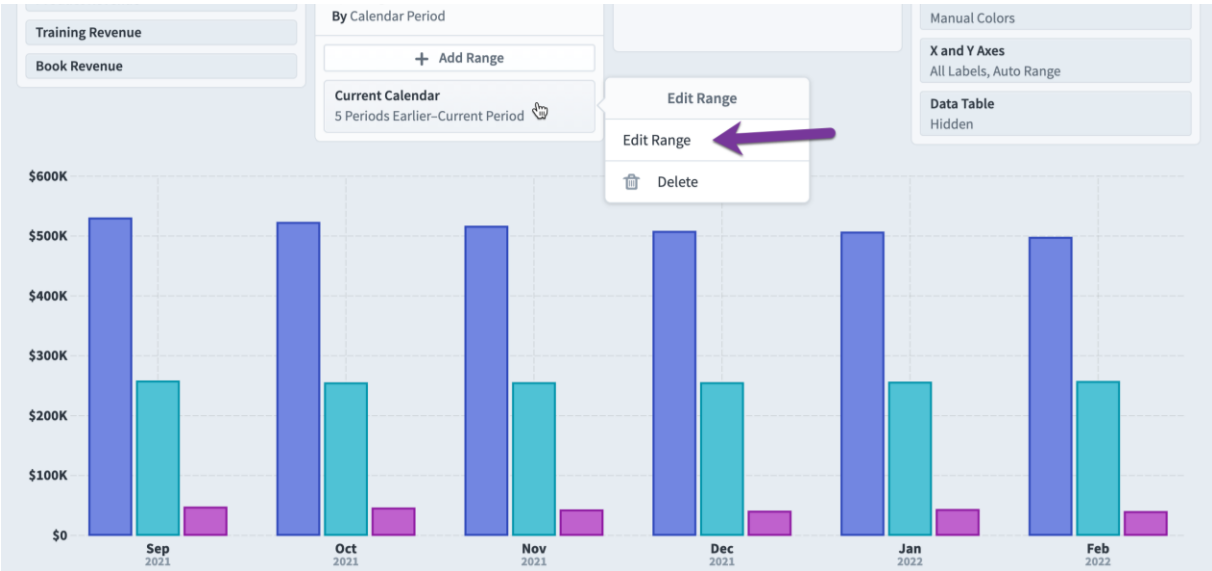


When we click it, we can see the various label options, including the ability to show percentages and abbreviated chart values.



Repeating left & right axes

When you're graphing scorecard items, you'll always be able to set your calendar period range in the Repeat panel. Here we're showing 6 periods of data for three KPIs. We can edit the calendar period range by clicking on it and choosing "Edit Range".



This is the standard date range selector where you can choose either a range based on the current calendar, or choose a specific calendar and choose a relative or date range.

Edit Range

Range Type

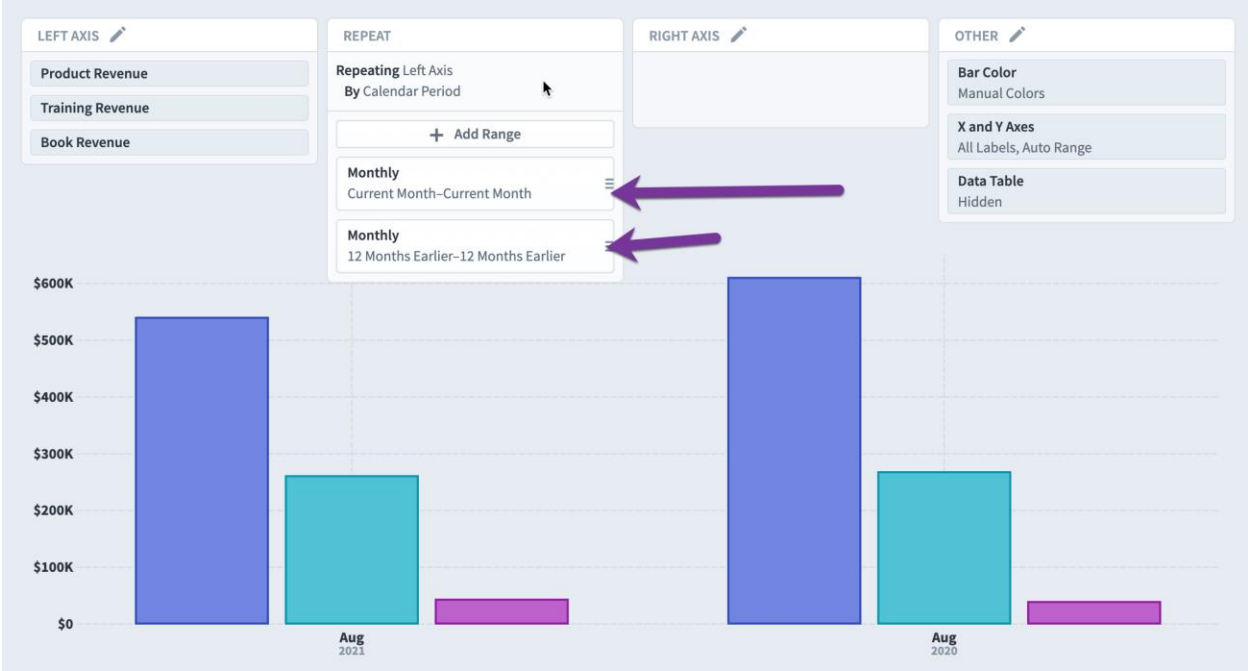
- Standard Date Range
- Group Similar Date Ranges

CALENDAR: Current Calendar

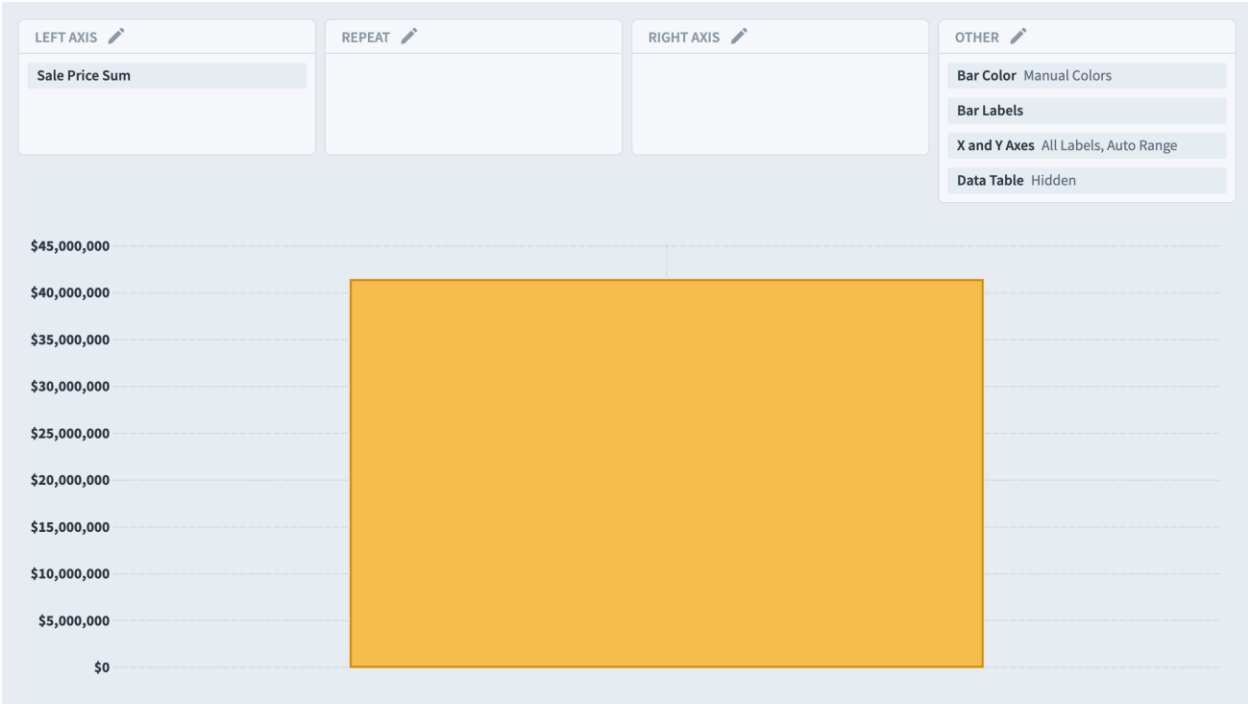
SHOW: 5 Periods Earlier TO: Current Period

Buttons: Cancel, Done

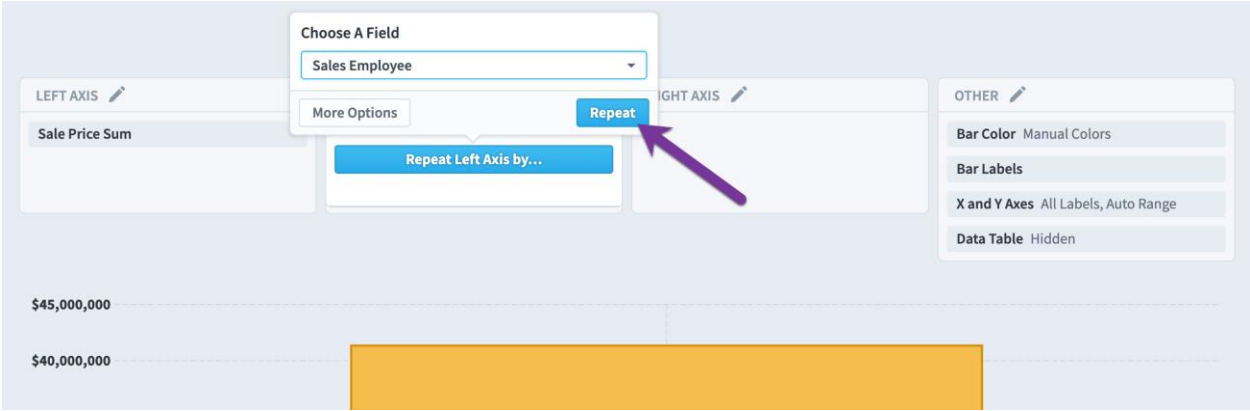
You can even show data for multiple ranges. Here we're showing the data for the current month as well as the data for the month one year earlier.



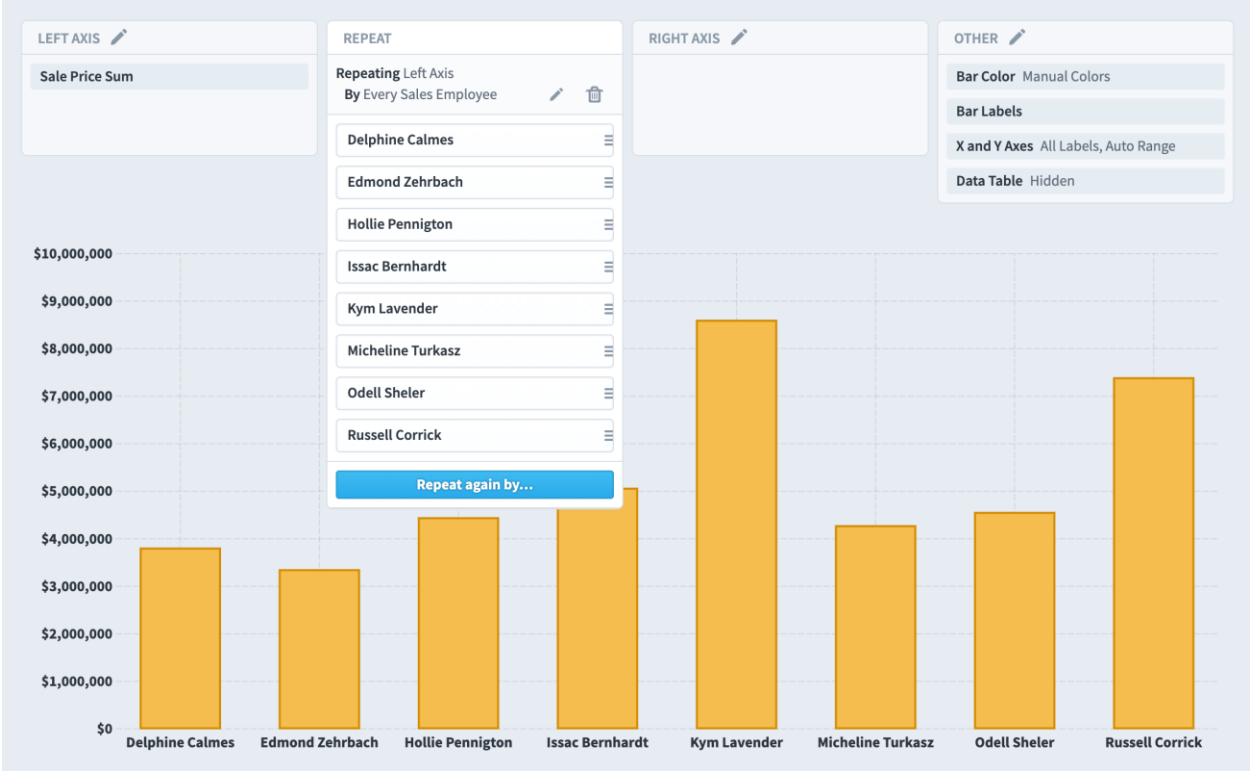
While scorecard items have a built-in repeating by calendar period, datasets and initiatives do not. In this dataset example, we have a single bar showing the total sales dollars for all time.



Repeating values aren't required for datasets, but they are very useful. Here we're going to the Repeat panel and choosing to repeat by the Sales Employee field.

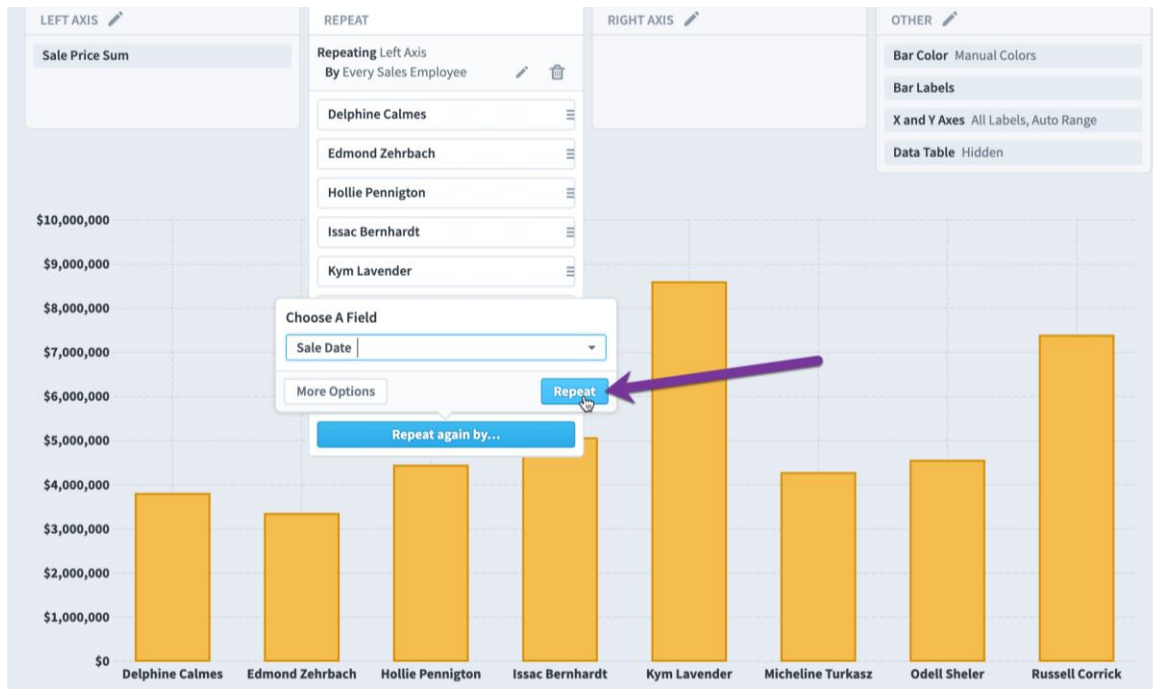


We now have a separate bar showing the all-time sales totals for every employee. Whenever the dataset is updated to include new employees, they'll automatically show up in this chart.

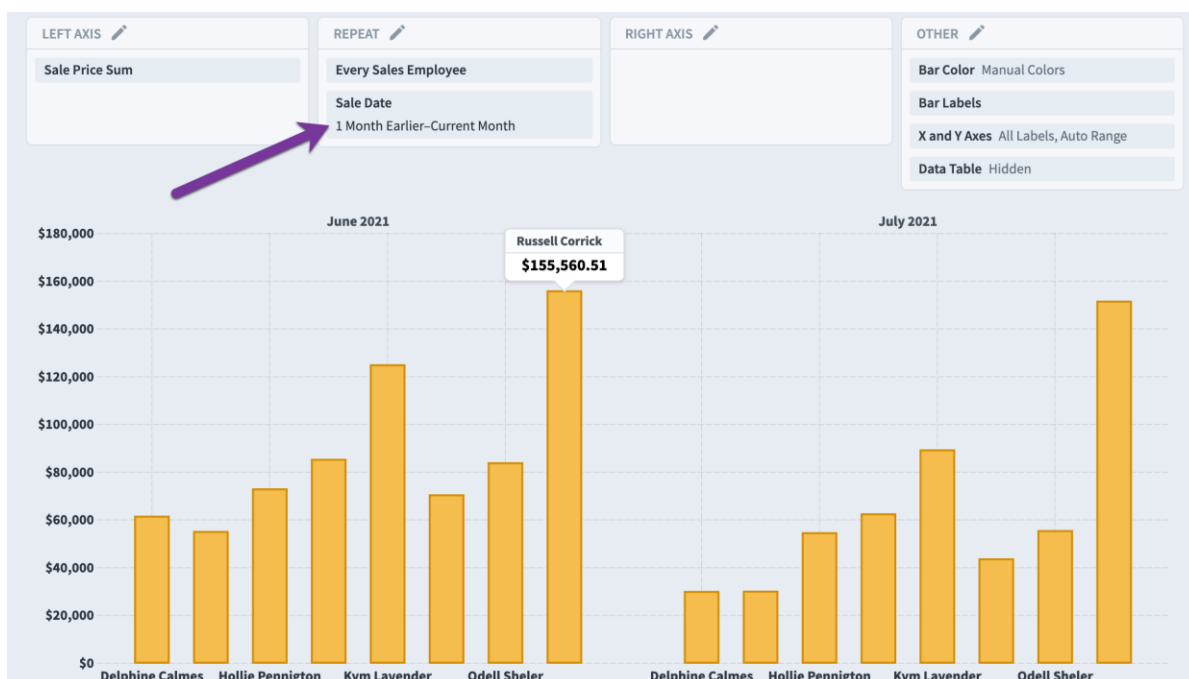


Repeating again

You can choose to repeat your data series a second time. To do this, click on the "Repeat again by..." button and choose a field. Here we're going to choose Sale Date.

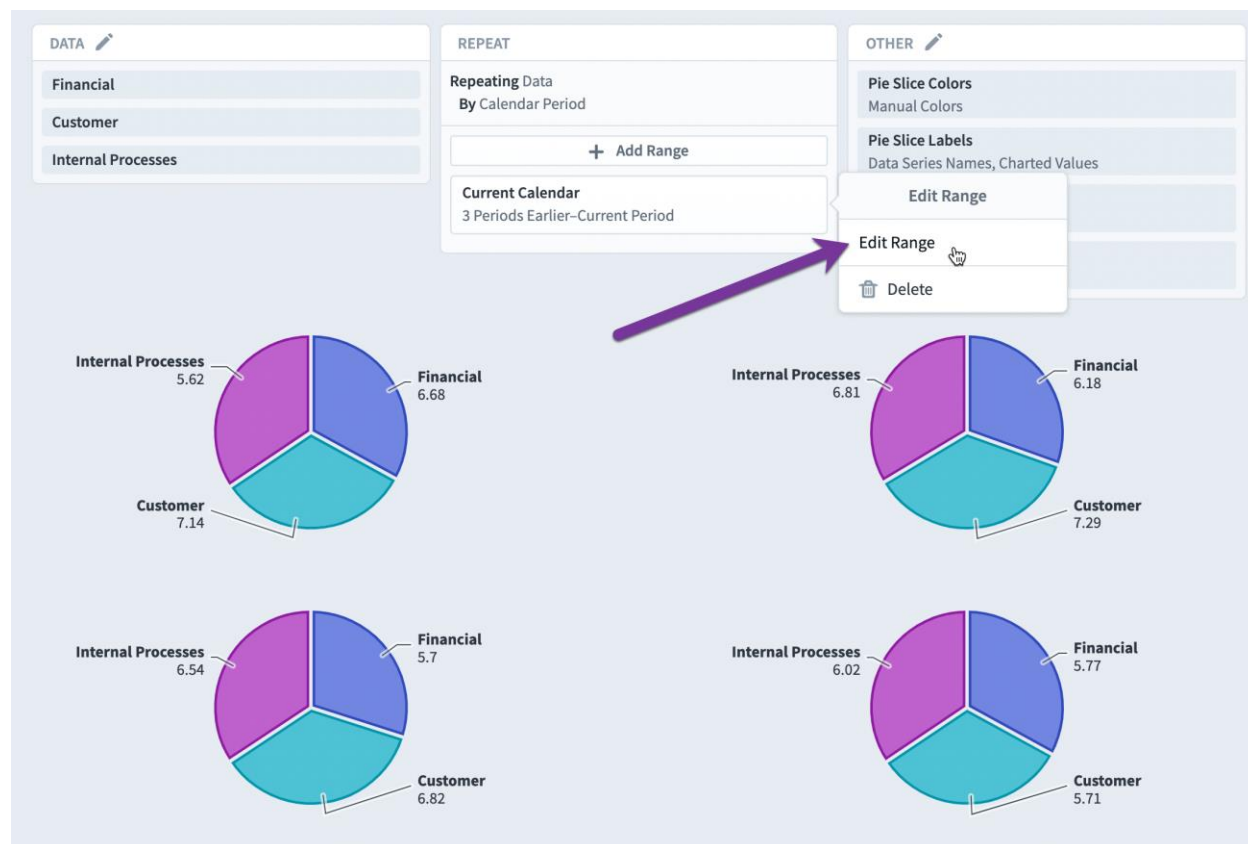


The chart is now showing the sales totals for the last two months for all employees.

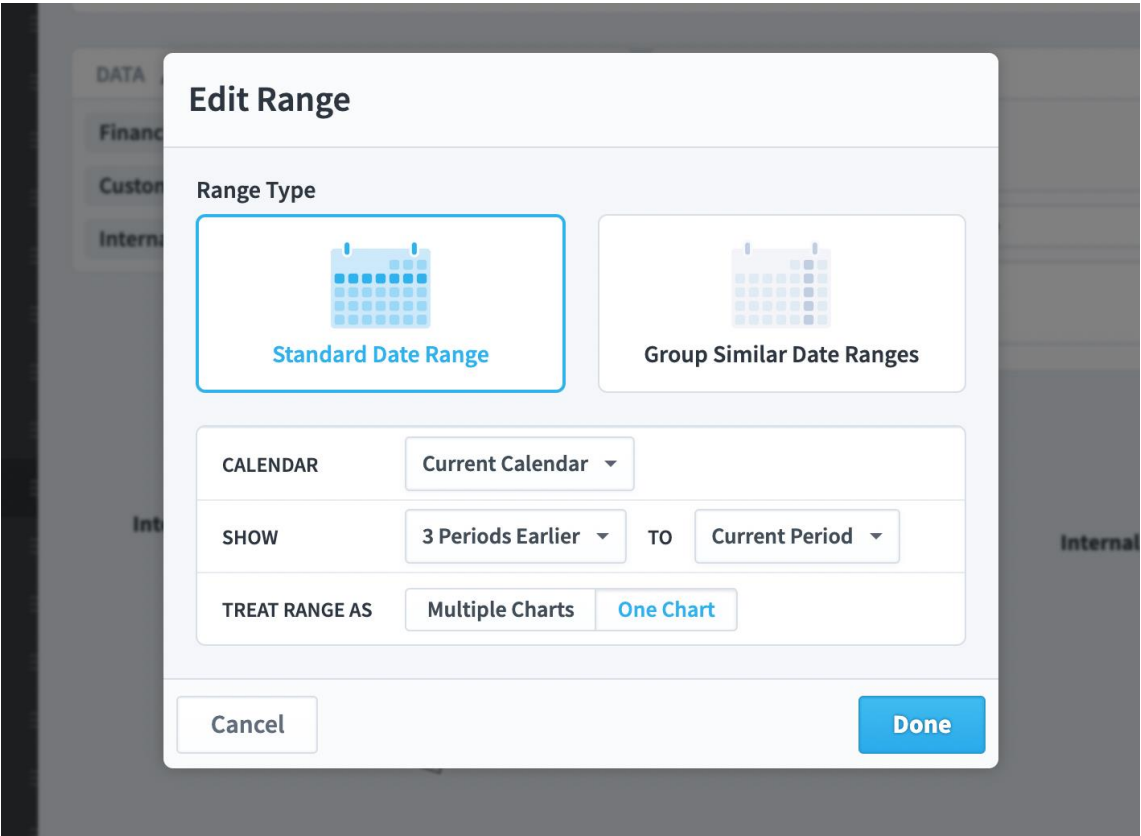


Repeating non-axis charts

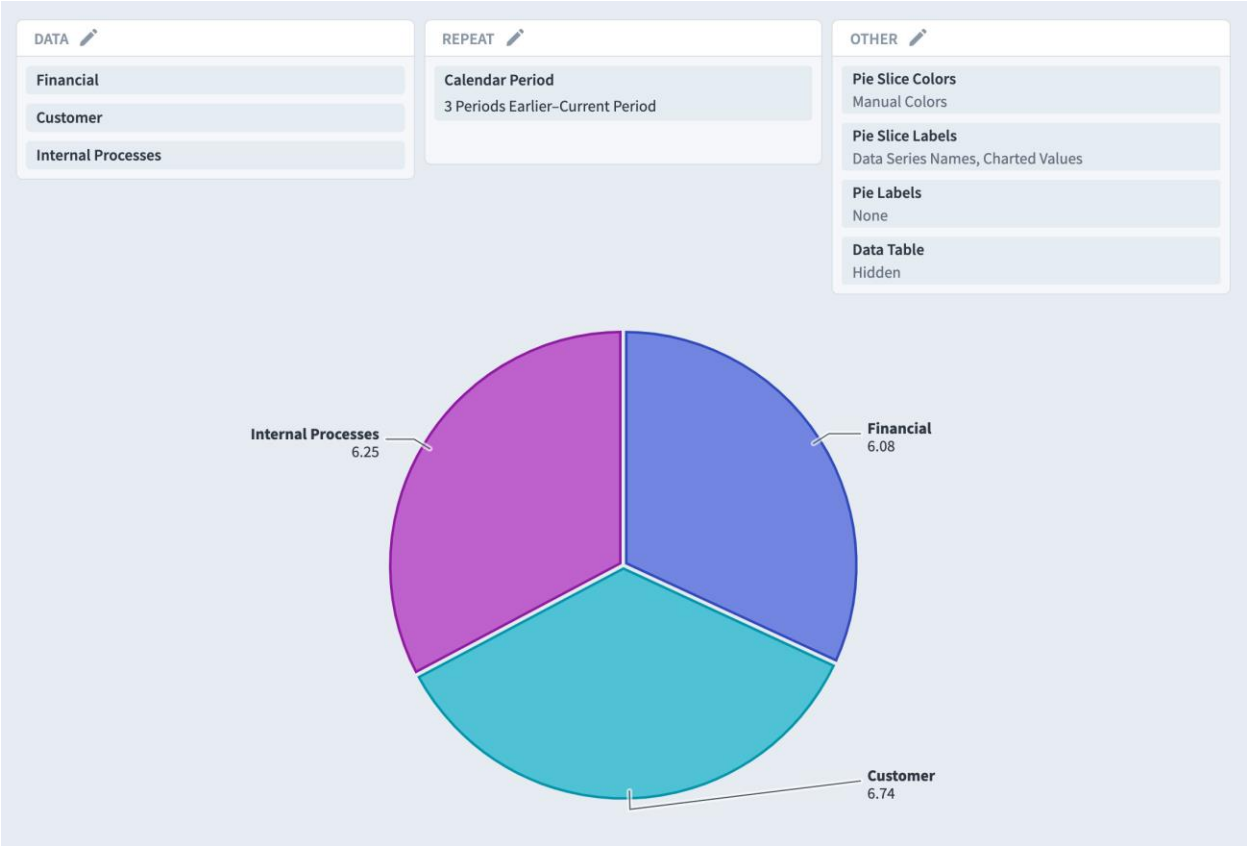
Repeating works the same for non-axis charts. In this example we're repeating three KPIs for four calendar periods. By default, each calendar period is its own pie chart, but you can change this by clicking on the calendar period range and choosing "Edit Range".



For non-axis charts there's a "Treat Range As" toggle, allowing you to show one chart for the entire range.

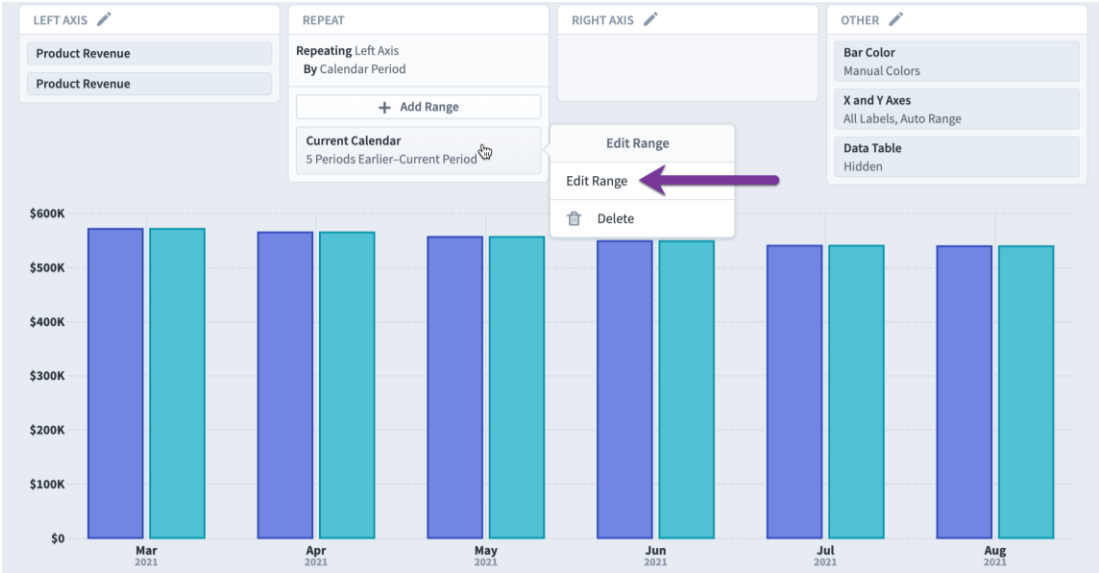


The result is this single pie chart that shows four periods of data.



Grouping similar date ranges

In addition to graphing standard date ranges like all the months in 2021, you can also graph data like months of the year or days of the week. In this example we have two identical data series for Product Revenue, and we'll choose "Edit Range".

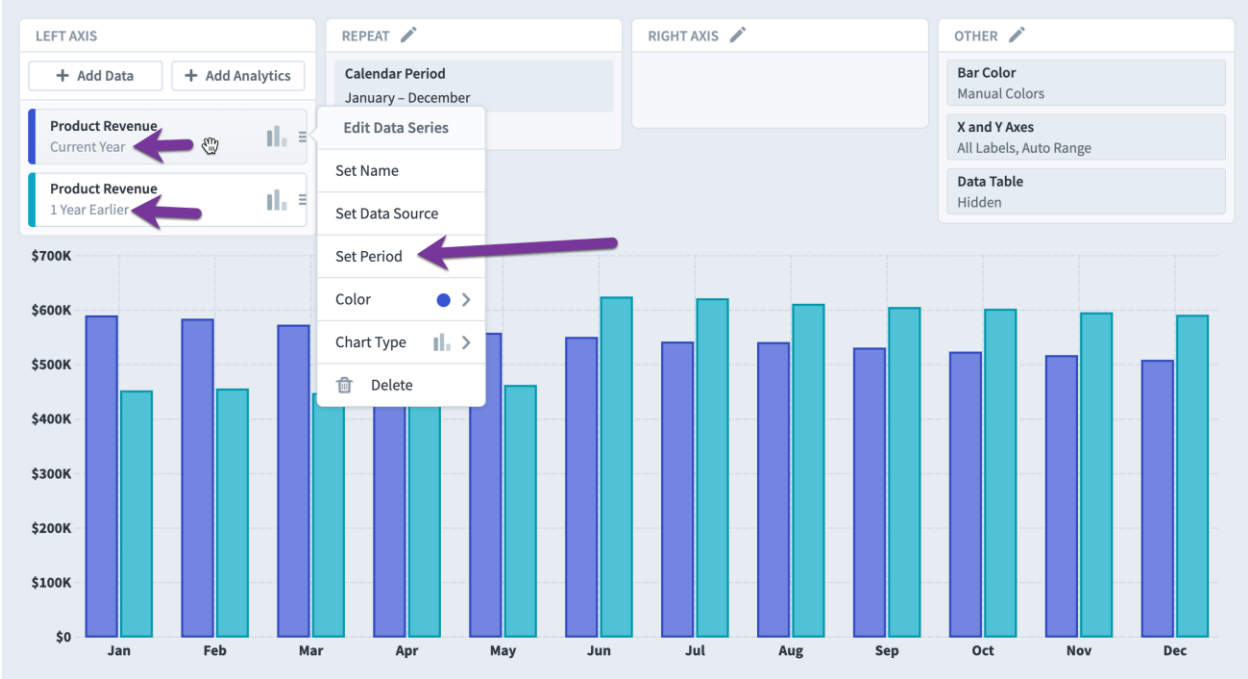


We'll change to "Group Similar Date Ranges" and then choose to group yearly data by monthly.

The 'Edit Range' dialog box is shown with the following settings:

- Range Type: Group Similar Date Ranges (selected)
- GROUP: Yearly
- DATA BY: Monthly
- TYPE: By Date
- SHOW: January TO December

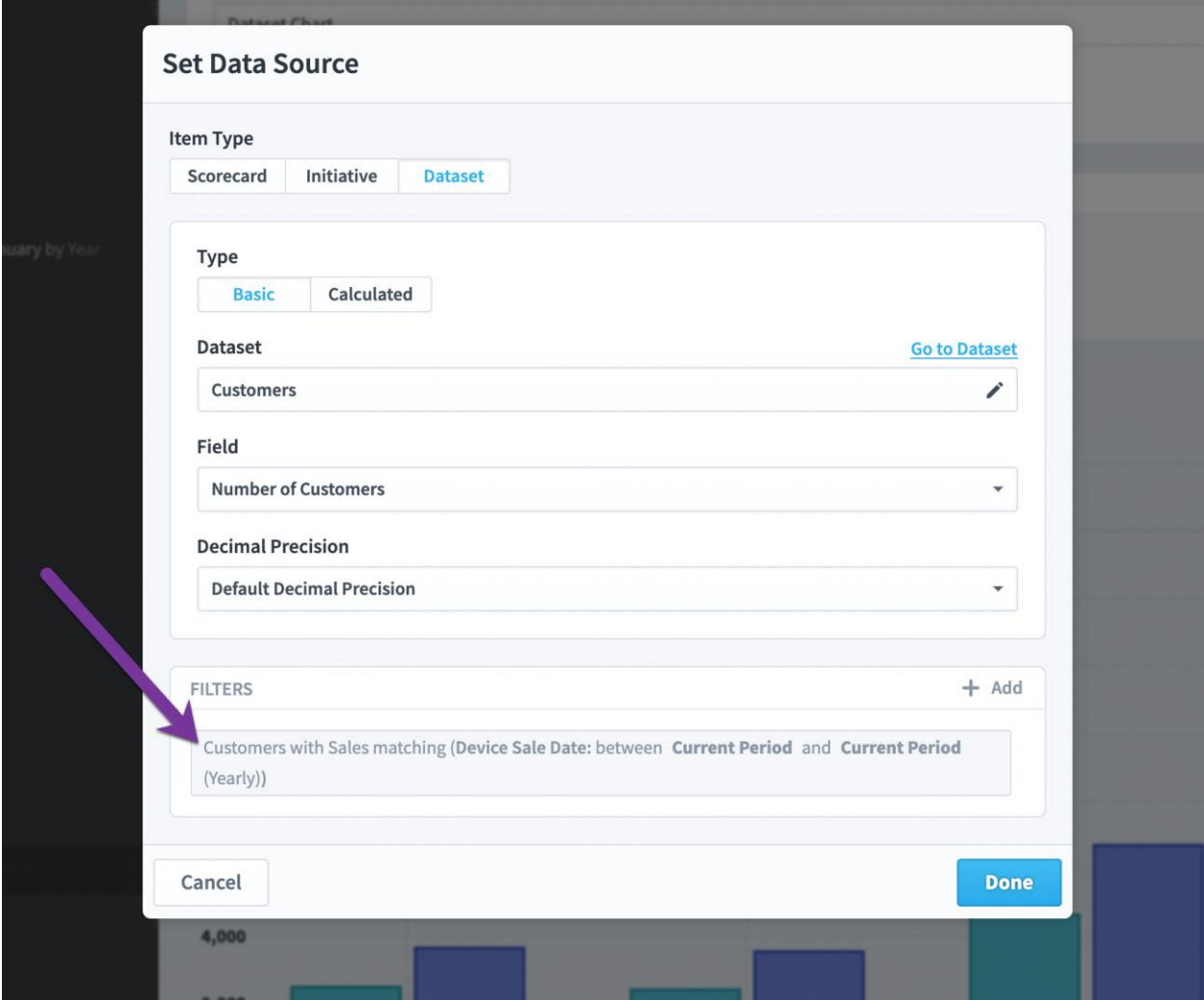
When we're done, we see a completely different kind of graph. As you can see, it now lists the months across the X axis but no years. Our chart now shows product revenue for the current year compared against product revenue for the previous year.



Every scorecard data series has a "Set Period" menu item. This only shows up when you've chosen to "Group Similar Date Ranges" and it allows you to choose which period to use for each data series. That's how we choose Product Revenue for this year vs. last year.

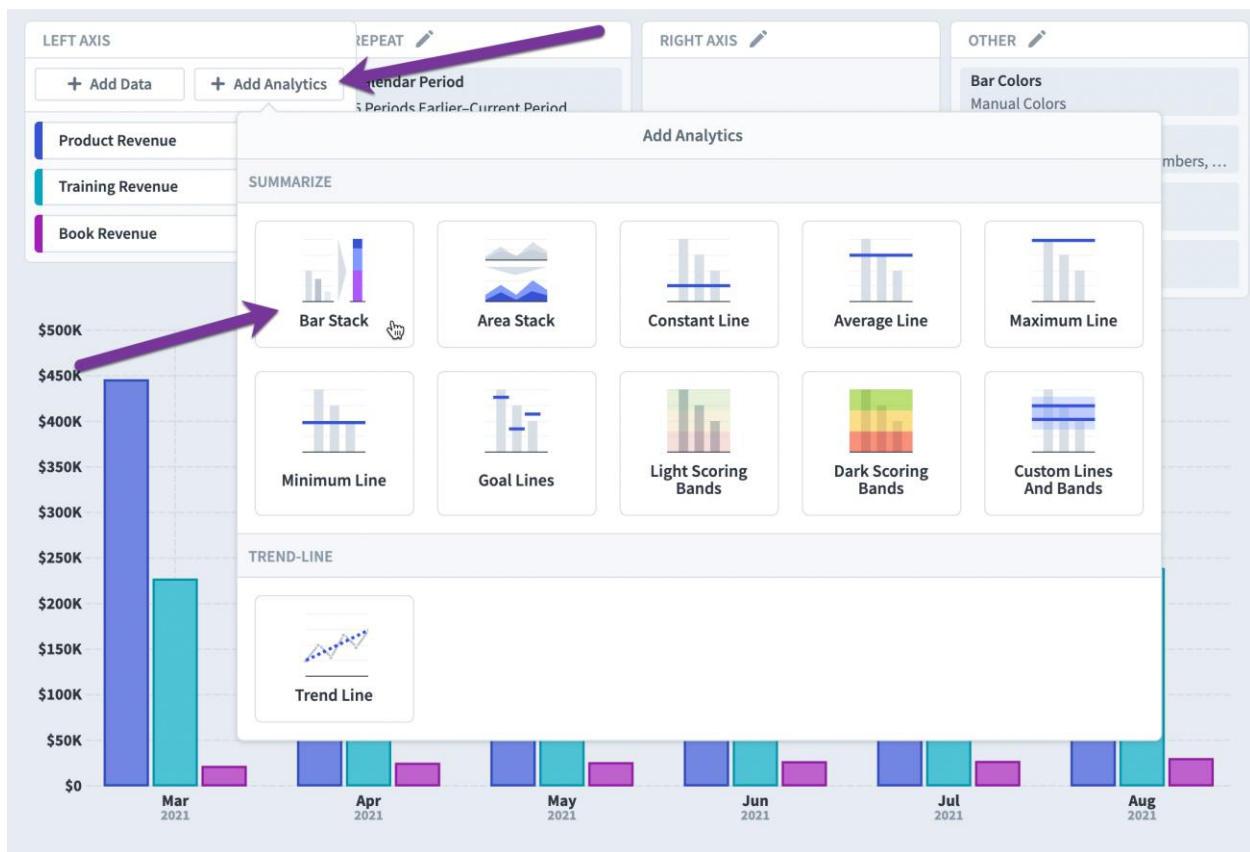
The screenshot shows the 'Set Period' dialog box. It has a title 'Set Period' and a 'CHOOSE A YEAR' section. Below this, there are two options for 'TYPE': 'Relative' (selected) and 'By Date'. There is also a 'SHOW' dropdown menu set to 'Current Period'. At the bottom, there are 'Cancel' and 'Save' buttons.

There's no "Set Period" menu item for datasets. Instead, you can just choose which date range you want as a filter in the "Set Data Source" menu.

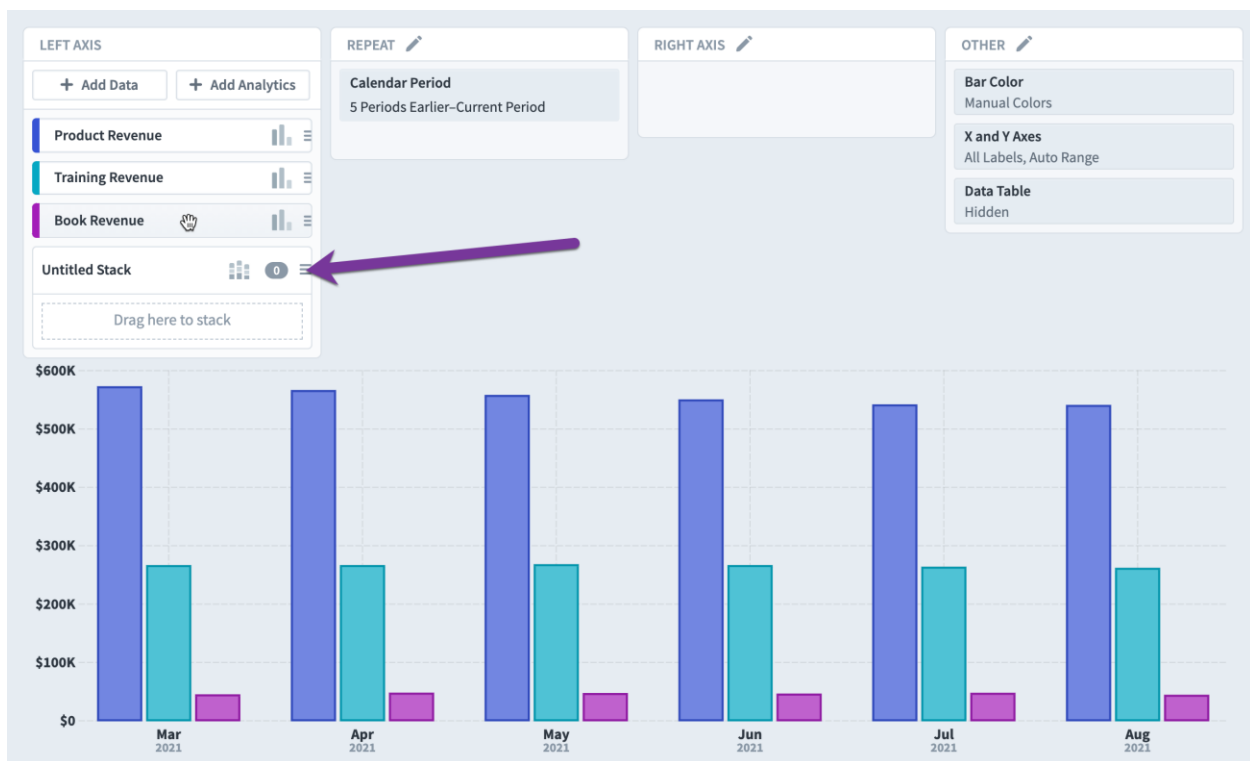


Bar and area stacks

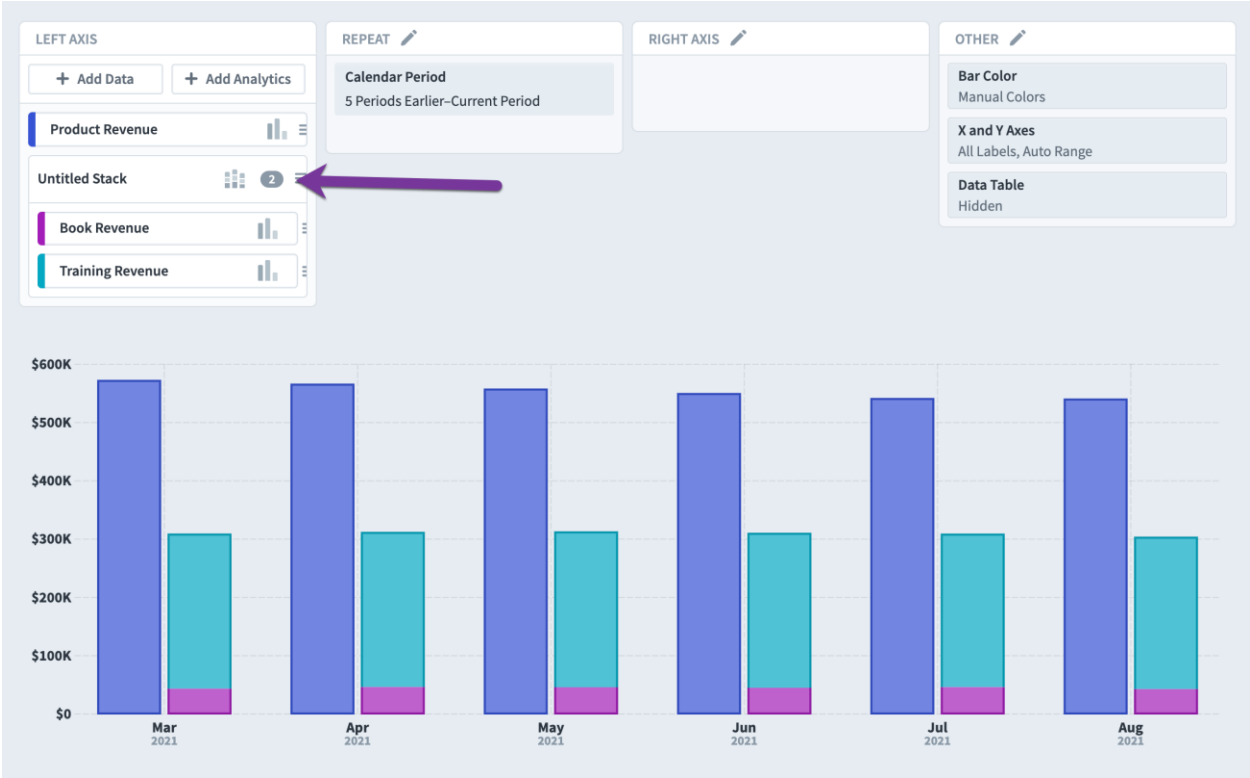
You can create bar or area stacks by choosing them from the "Add Analytics" menu on either the left or right axis.



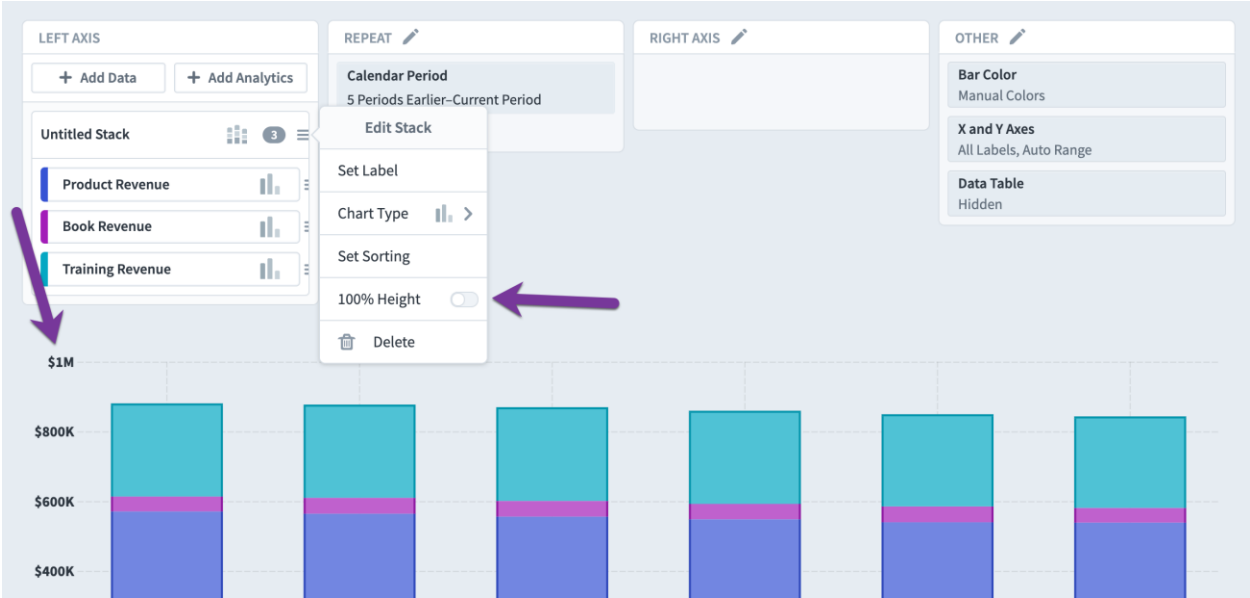
This adds an empty stack to the axis.



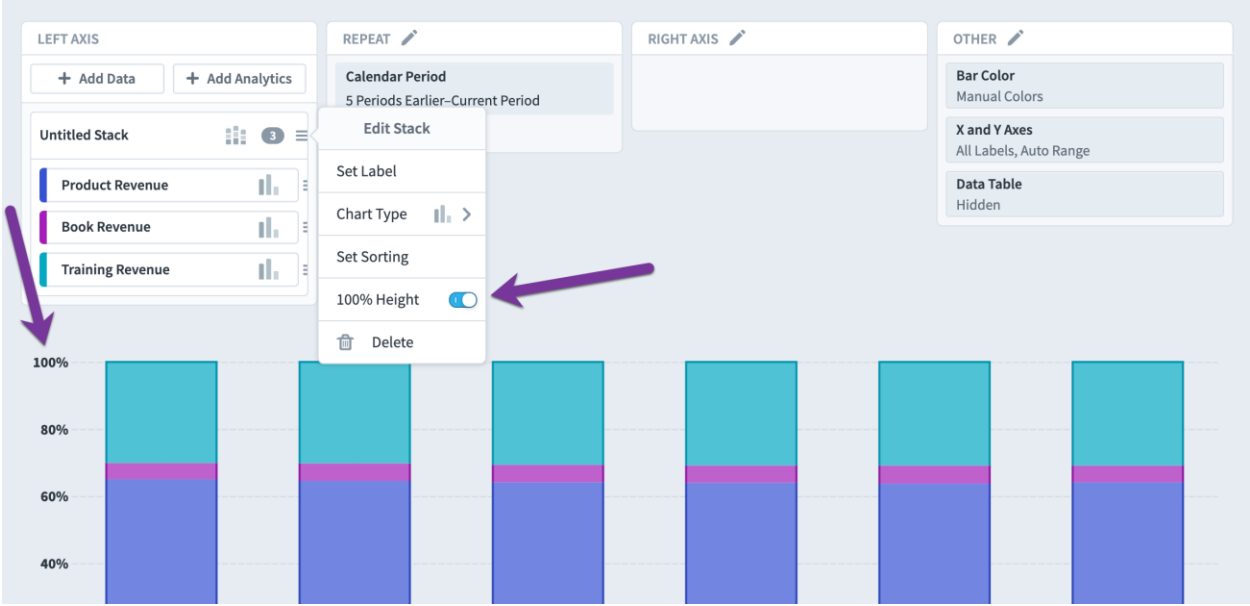
All you need to do is drag and drop data series into the stack. Here we've added book and training revenue to the stack while product revenue is its own bar. This allows you to have multiple stacks and non-stacked bars at the same time.



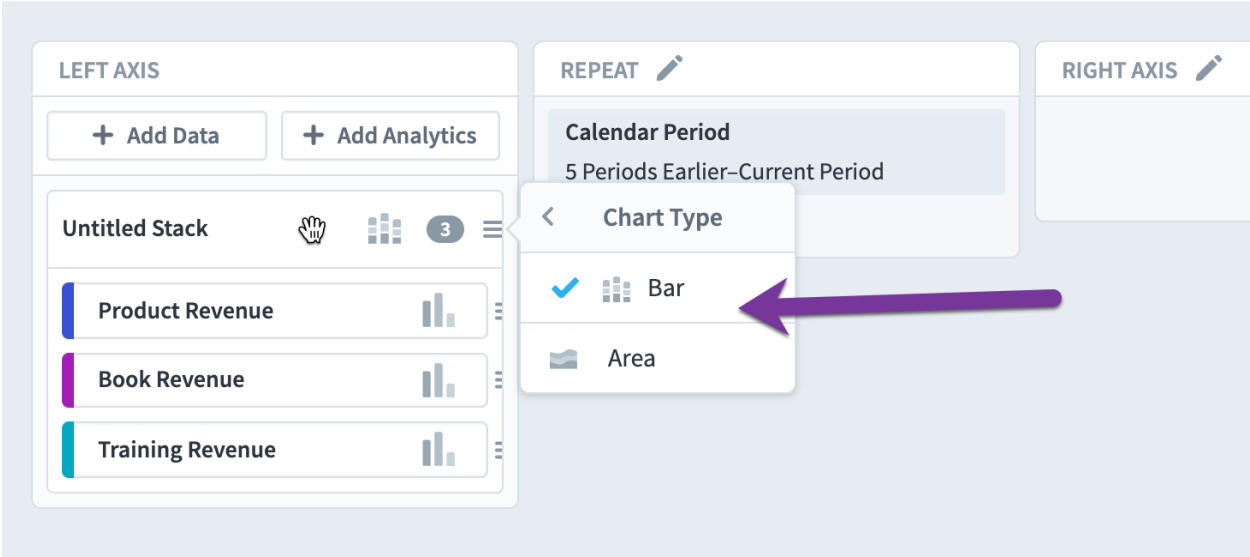
You can configure the stack by clicking on it. By default, 100% height is off, and you can see how the Y axis goes up to \$1M.



When we turn on the 100% Height toggle, the Y axis changes to percentages and all repeating stacks become full height.

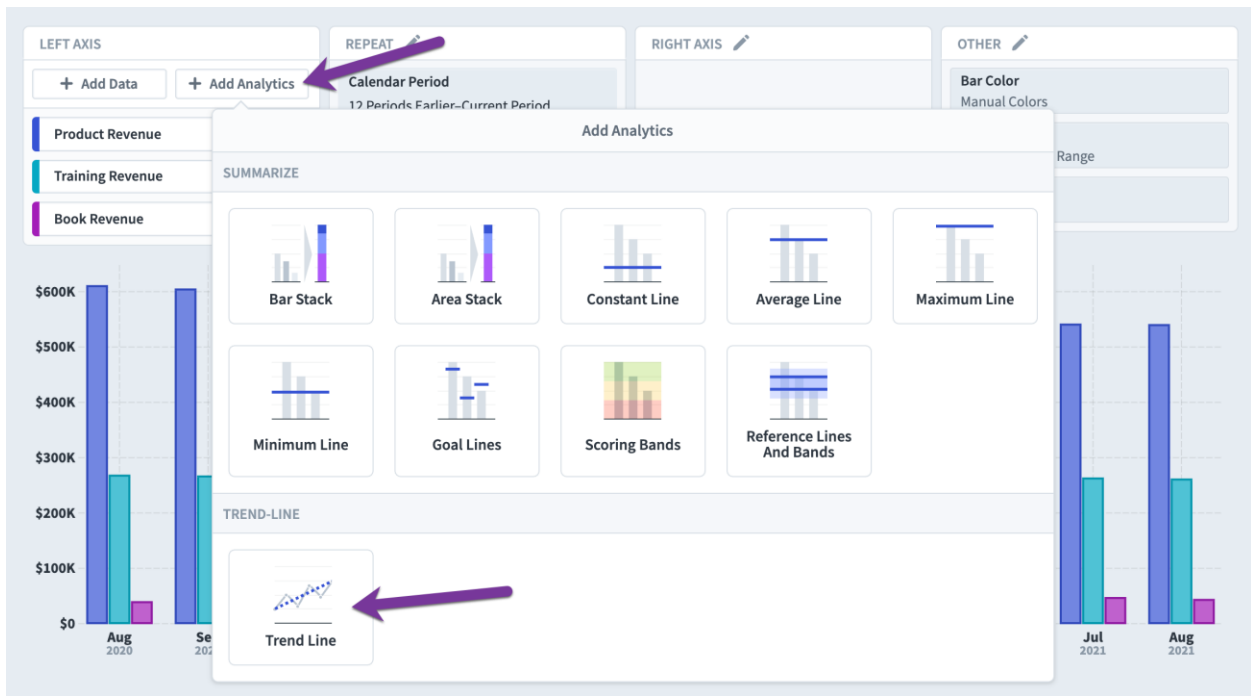


You can also change between Bar and Area stacks.

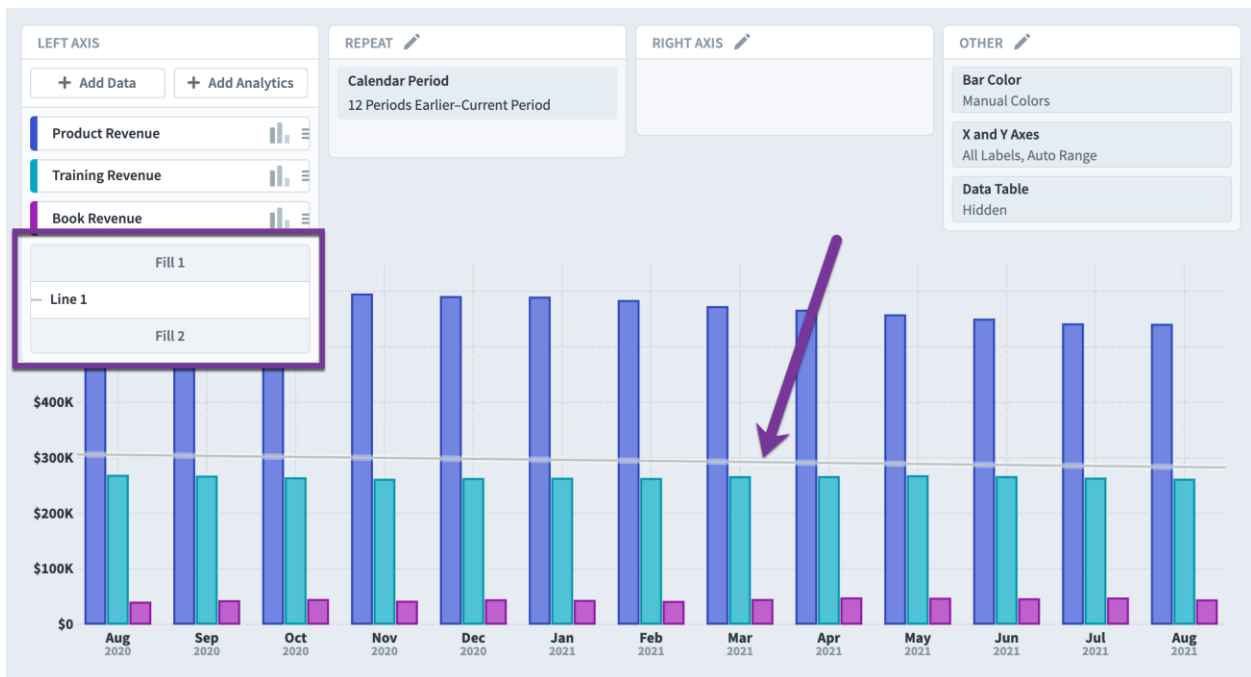


Trend lines

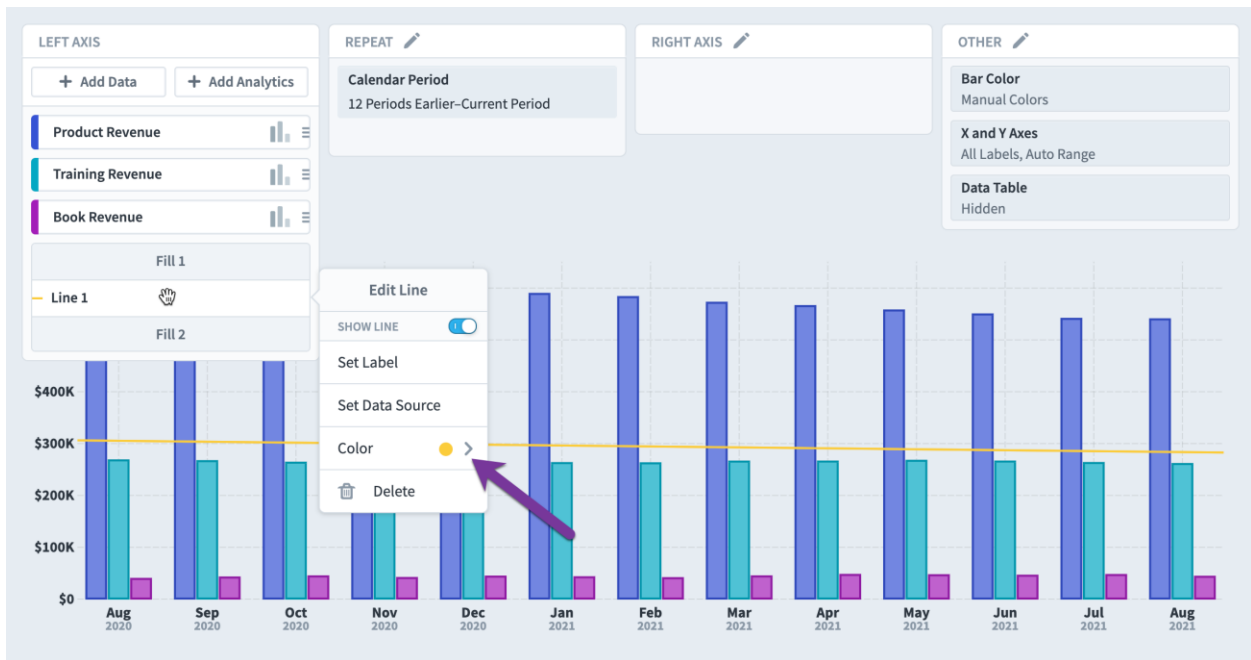
You can add a trend line from each axis' Add Analytics menu.



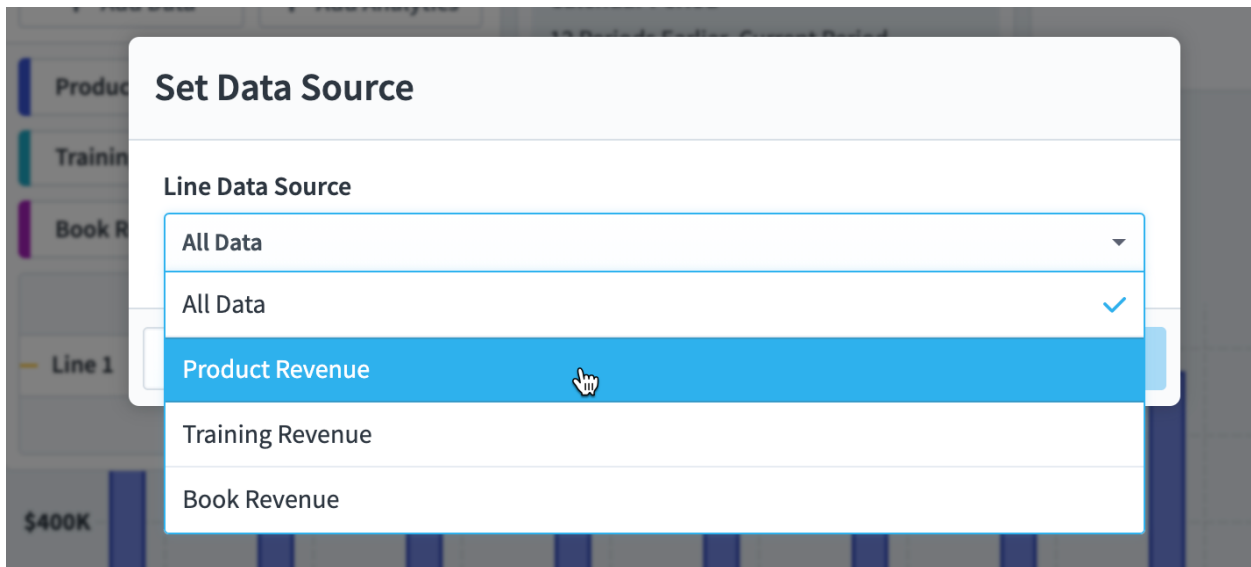
We now see a trend line object in the left axis panel. There's also a trend line showing each month's average of the three series.



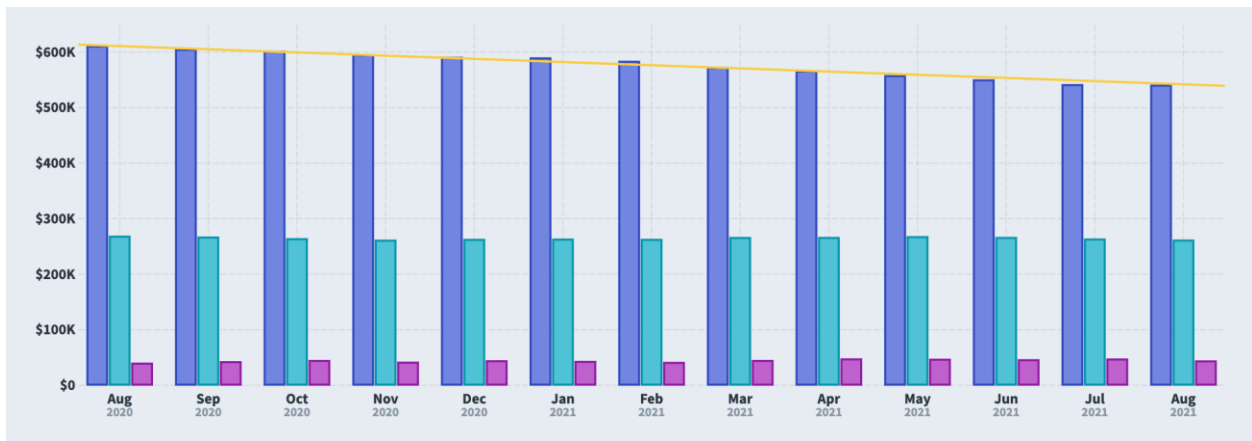
You can change the line's color.



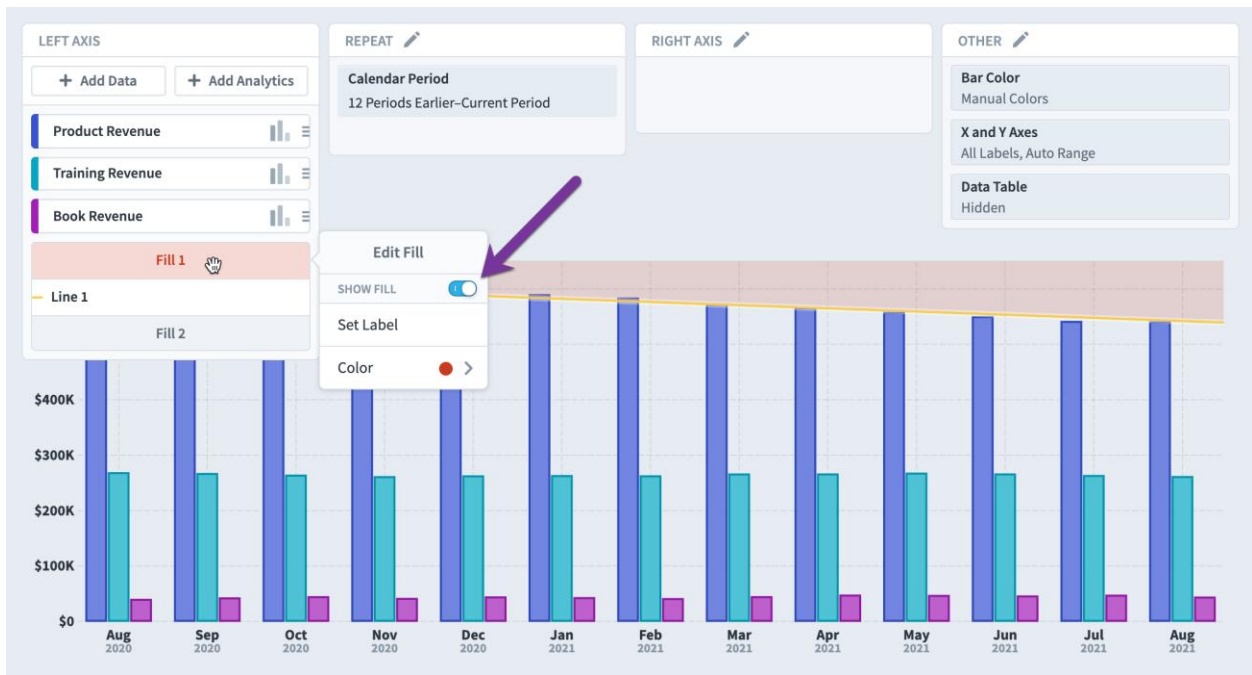
You can also set its data source. Here we're changing it to Product Revenue rather than All Data.



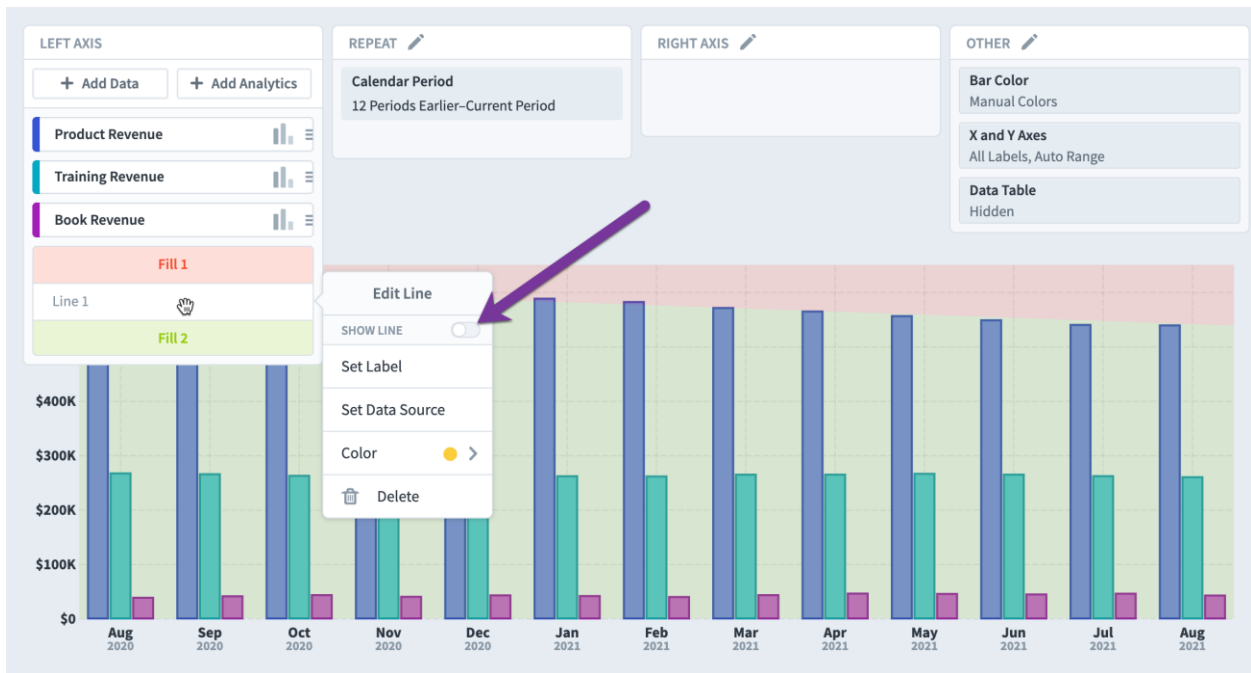
The chart now looks like this.



Trend lines have an optional fill above and below. Here we're filling red above the yellow trend line.

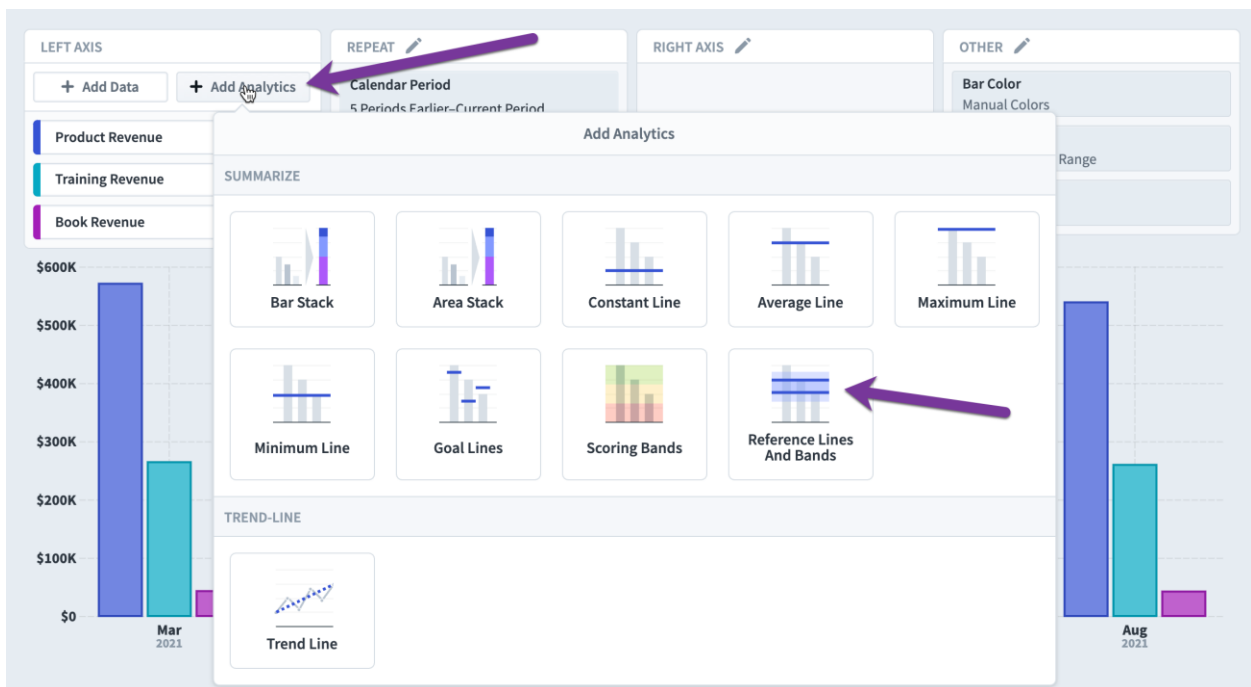


Here we've turned off the display of the line and are showing a red fill above the trend and a green fill below.

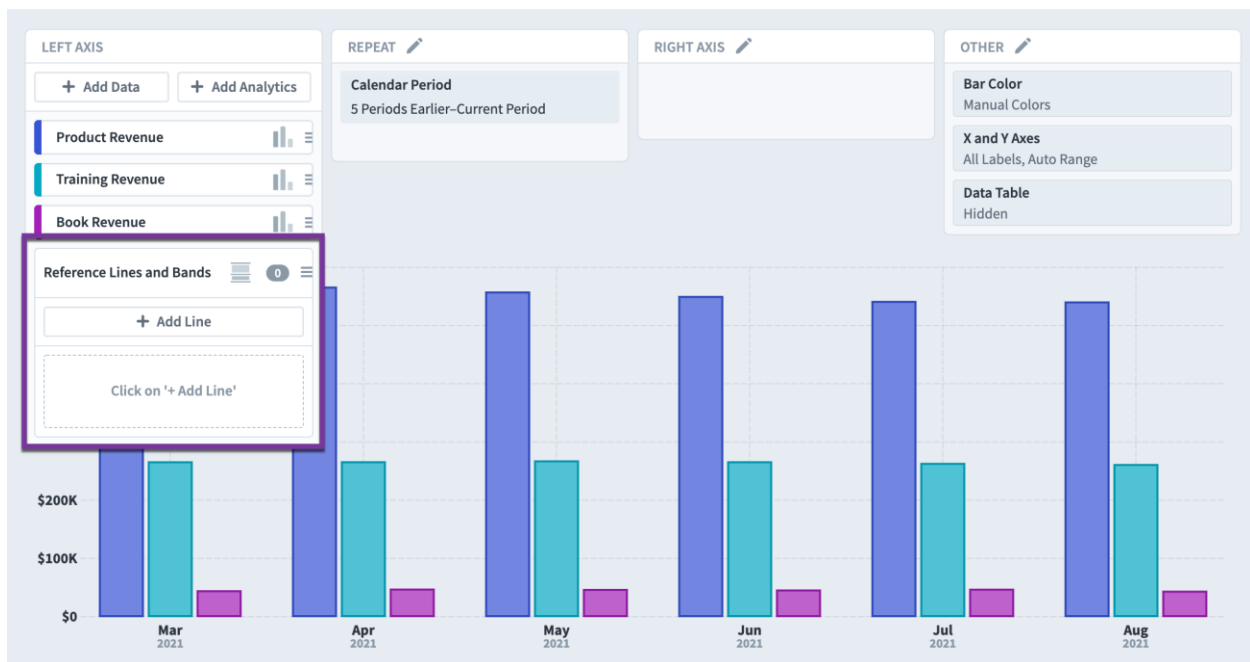


Reference lines and bands

You can add reference lines and bands from the Add Analytics menu for an axis. There are several pre-configured lines and bands to choose from, but in this example we'll choose a blank Reference Lines and Bands item.



This adds a Reference Lines and Bands item to the axis.



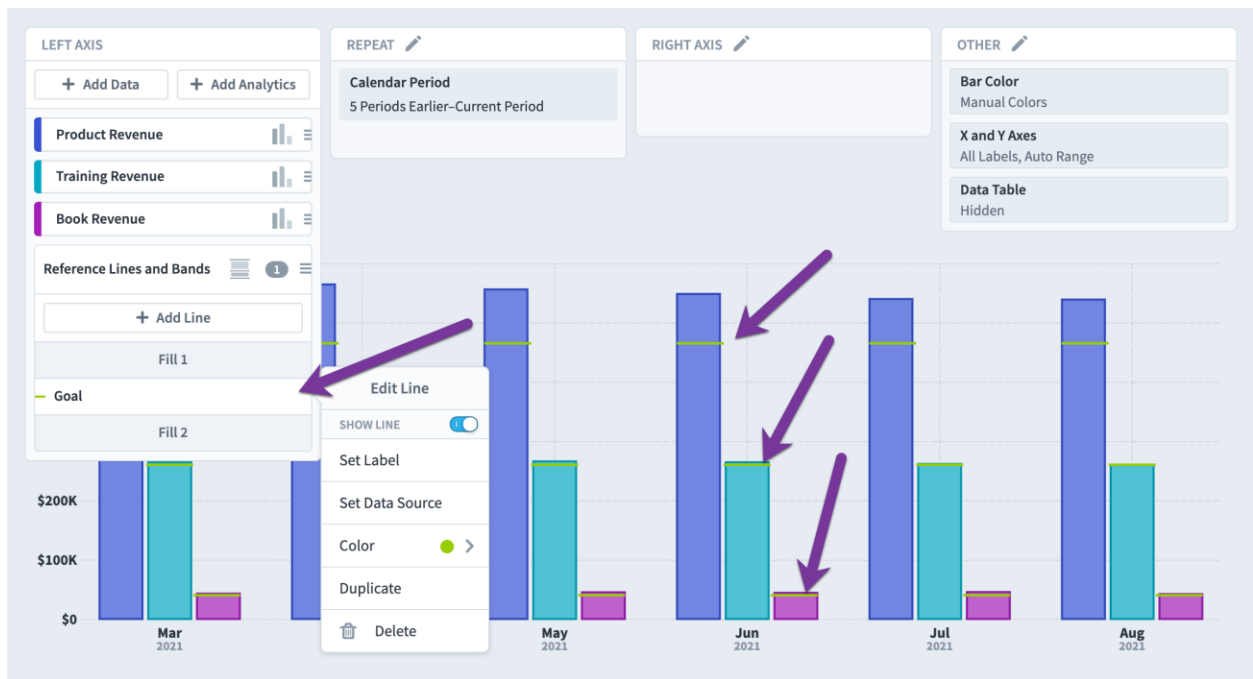
We'll click "Add Line" and then set the data source. First, we'll choose to show each scorecard item's goal.

The 'Set Data Source' dialog box is shown with the following configuration:

- Line Data Source:** Scorecard Item Field
- Scorecard Item Field:** Goal

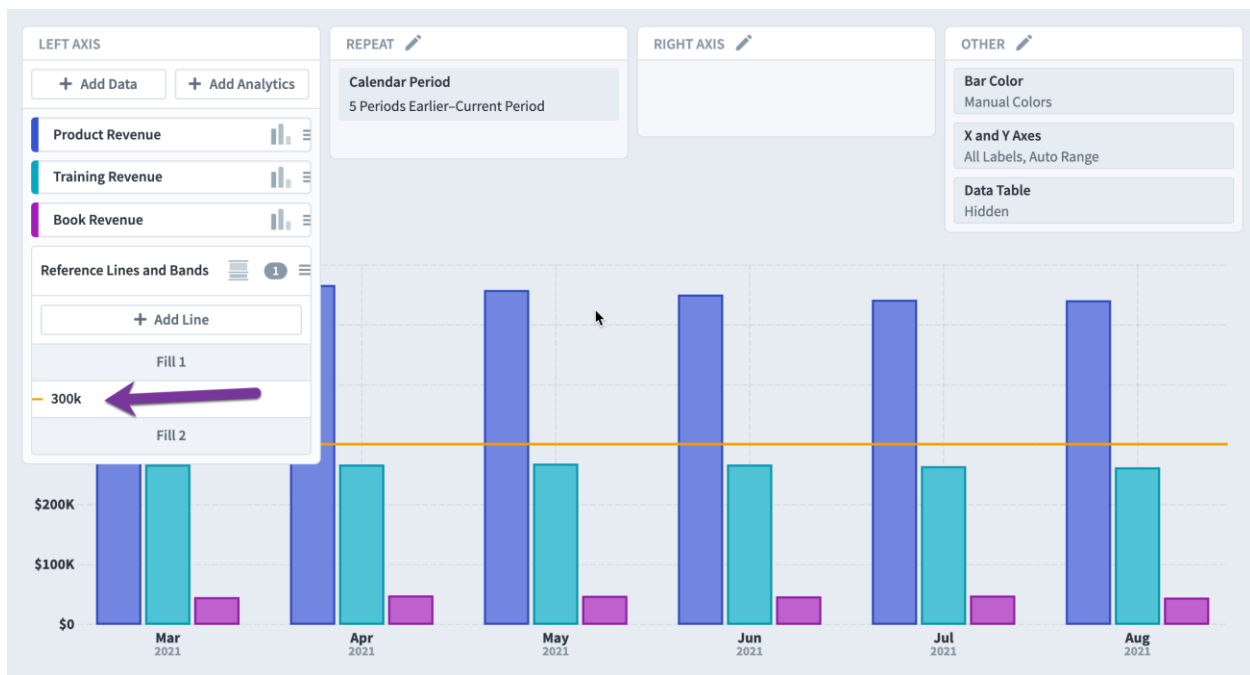
Buttons: Cancel, Done

The chart now looks like this. There's a goal line on every bar that we've made green, and we've chosen "Goal" for the line's label.

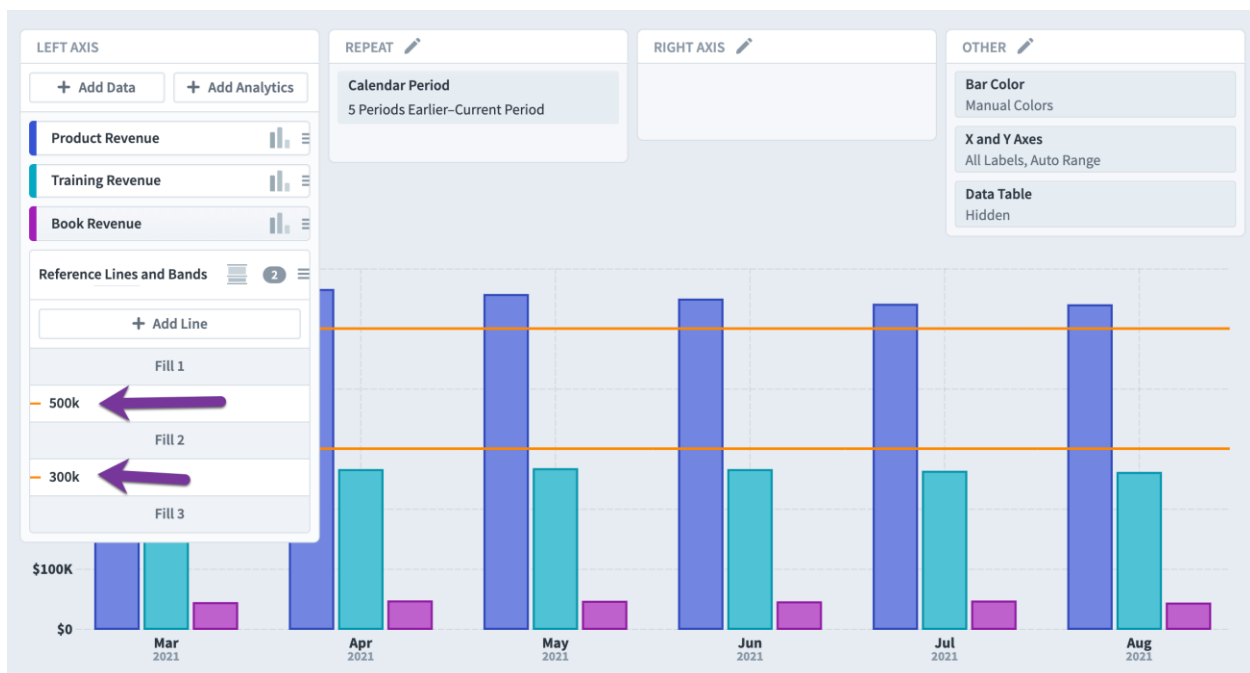


Let's see what a different data source looks like for the line. Here we'll choose a constant number of 300,000.

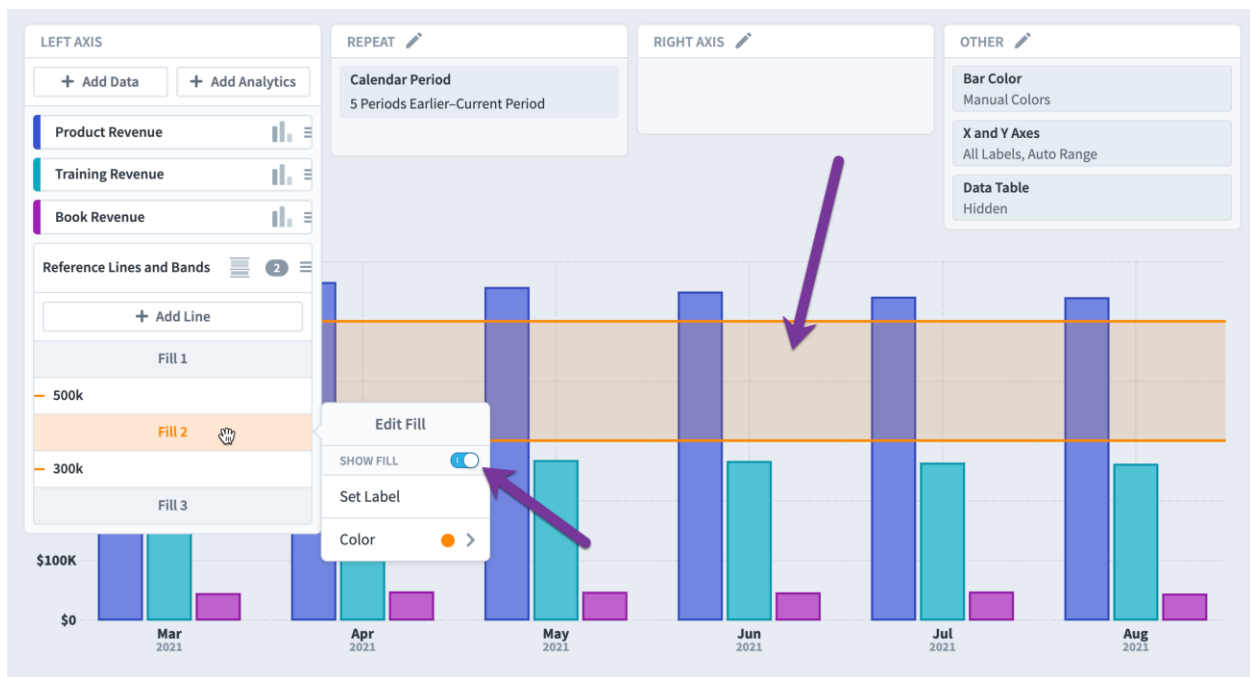
After changing the line color and label, it now looks like this.



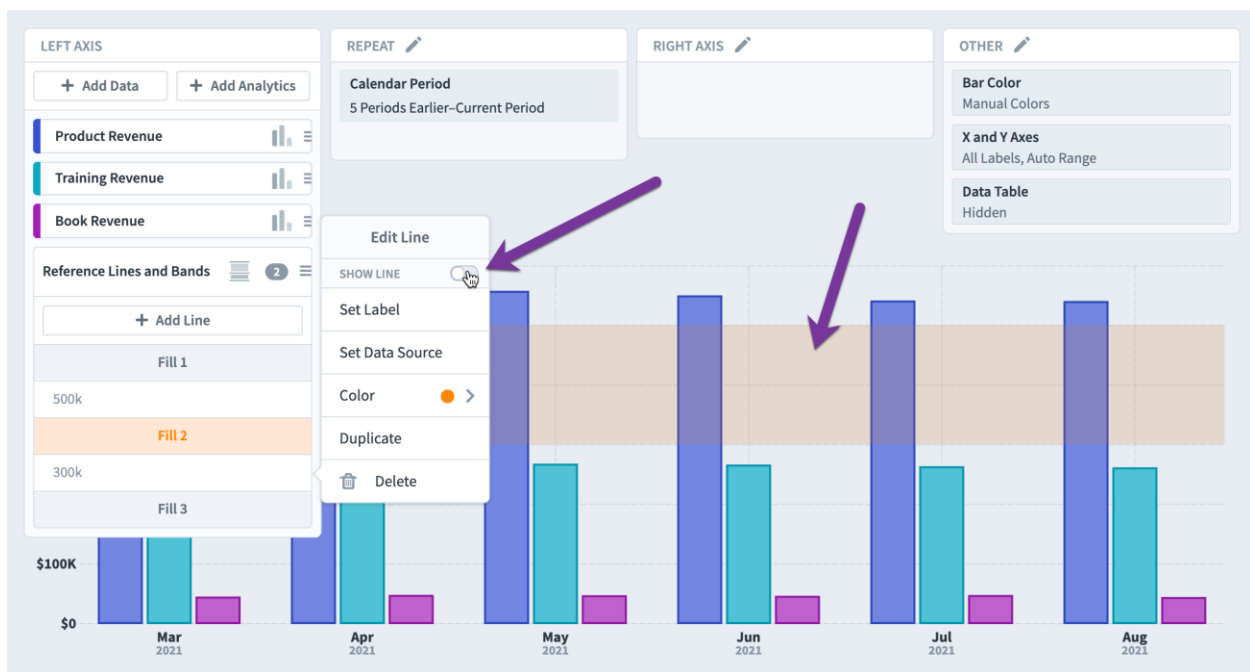
You can add as many lines as you want, each with its own data source. Here we've added a second orange line, this one at 500,000.



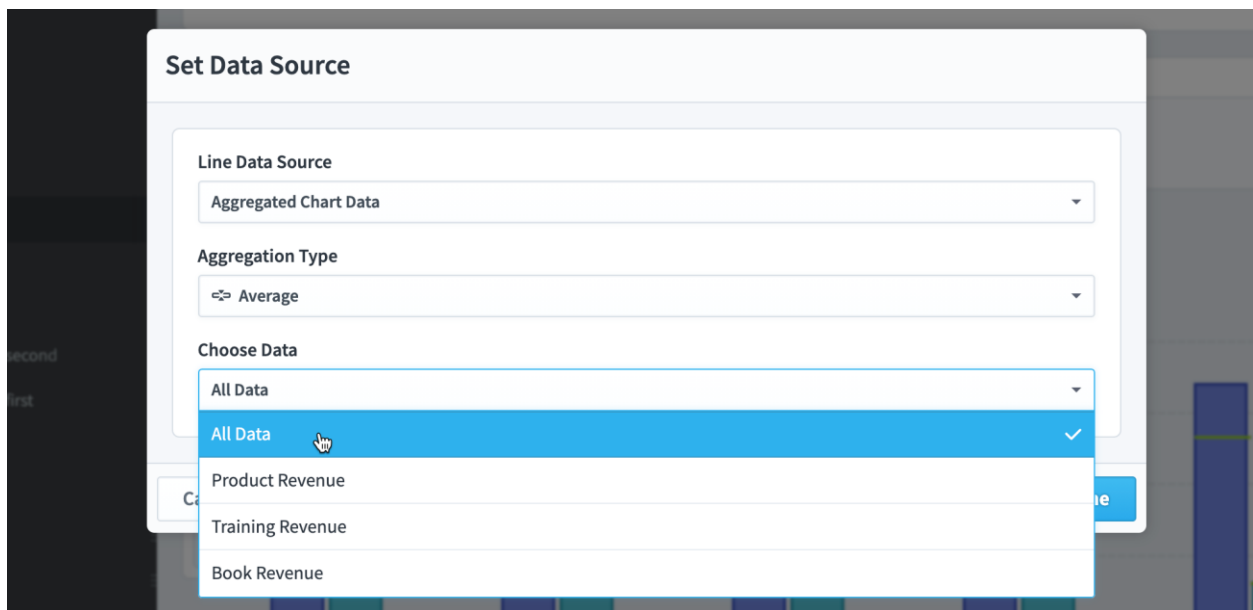
There are optional fills above, below, and between lines. Here we're setting the middle fill to orange. A fill between two lines is also called a band.



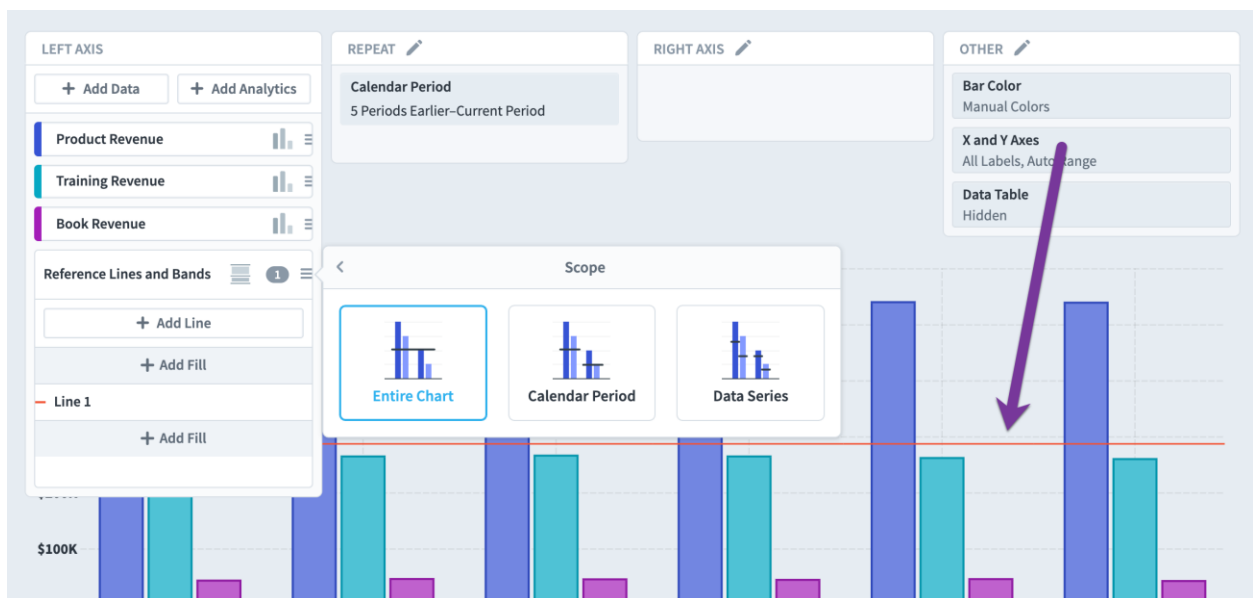
You can even turn off the display of the lines to just show the fill.



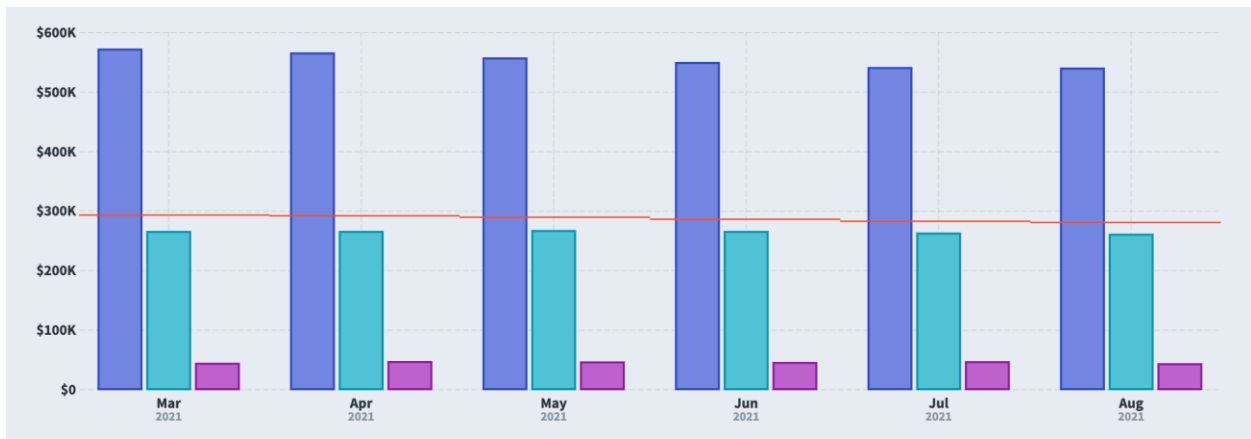
Finally, we'll change the line to show the average of all data series.



By default, the scope is the Entire Chart, so you'll see a single line across the entire chart.

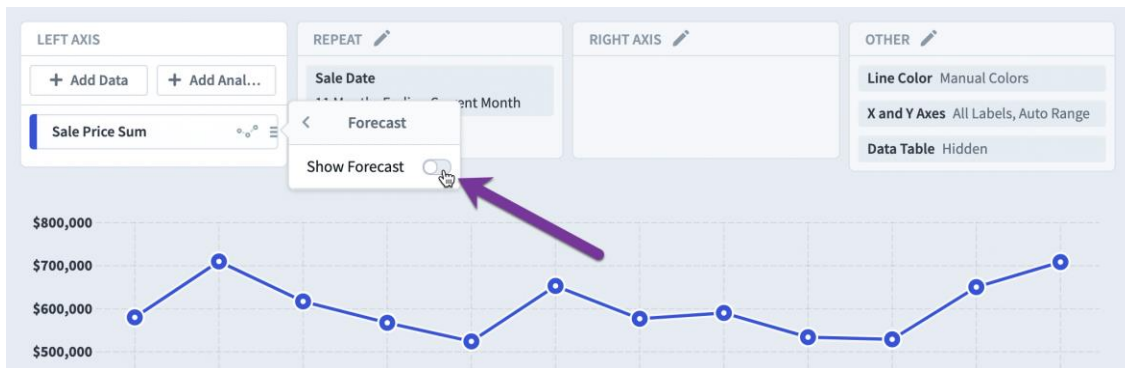


When we change the Scope to "Calendar Period", however, you'll see the chart is now only averaging the series inside of each calendar period, with a separate red line for each. Notice how the red line jumps slightly from period to period.



Forecasting

Line data series have a "Show Forecast" toggle.



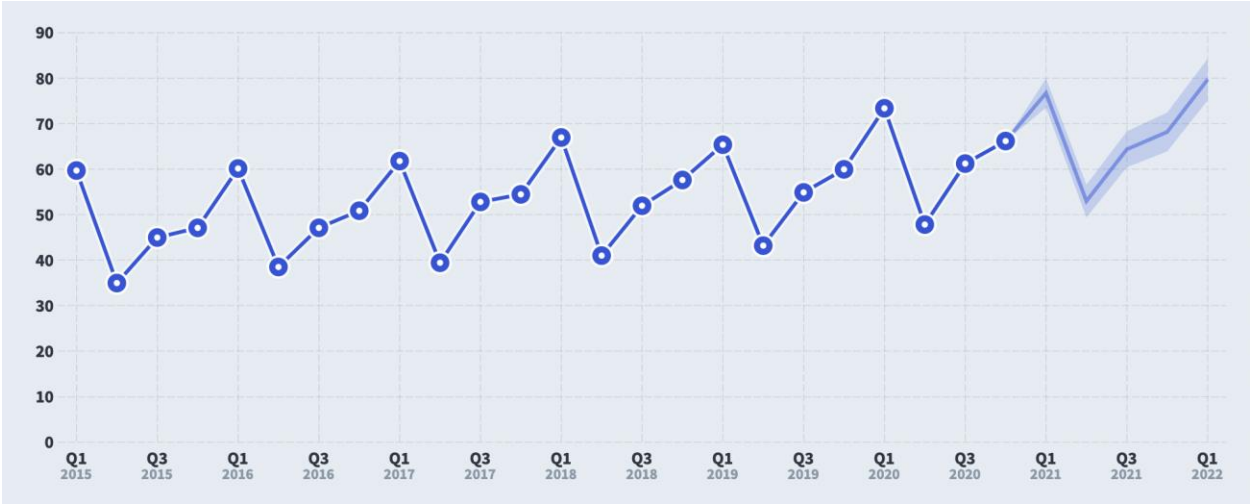
When forecasting is turned on, Spider Impact will show predictions based on historical values. The area around the predicted line is the confidence interval.



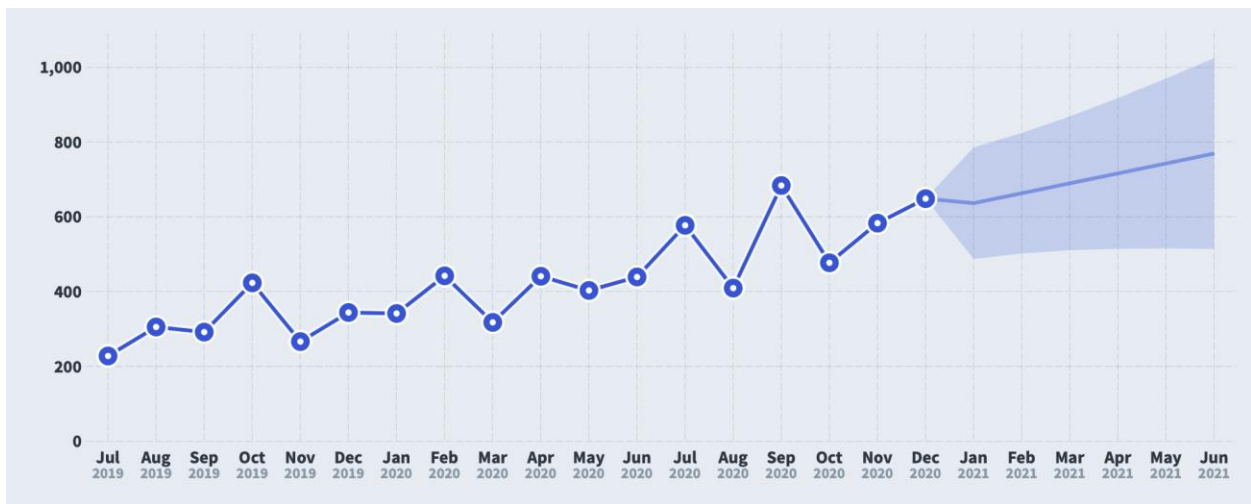
By default, the confidence interval is 95%, meaning that based on the data provided, the line has a 95% chance of being in that shaded region in the future. You can change this to 90%, 99%, or turn it off all-together.



Here's an example of Spider Impact detecting a seasonal trend.



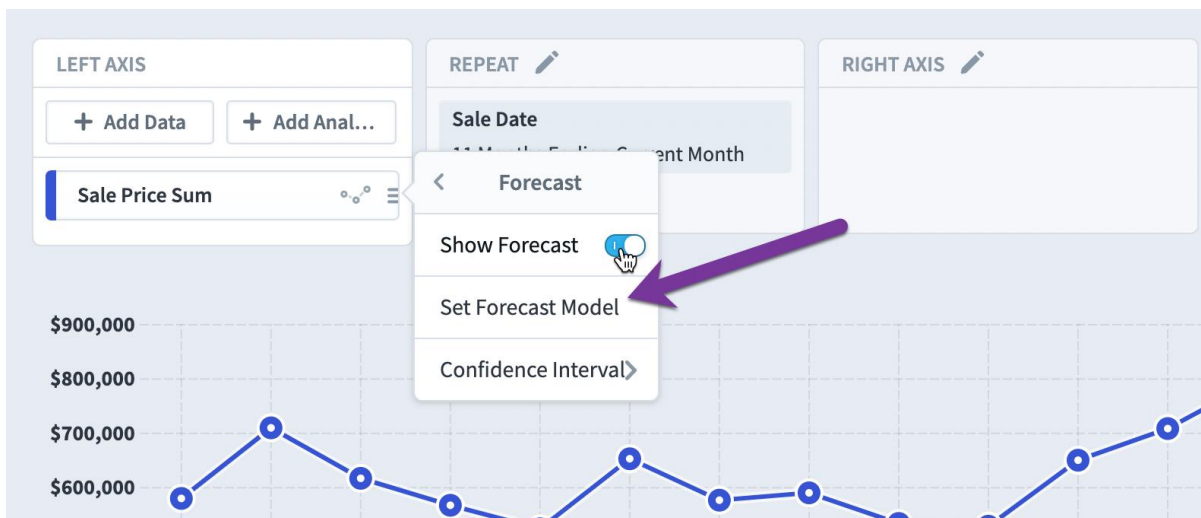
Here's a non-seasonal positive trend example.



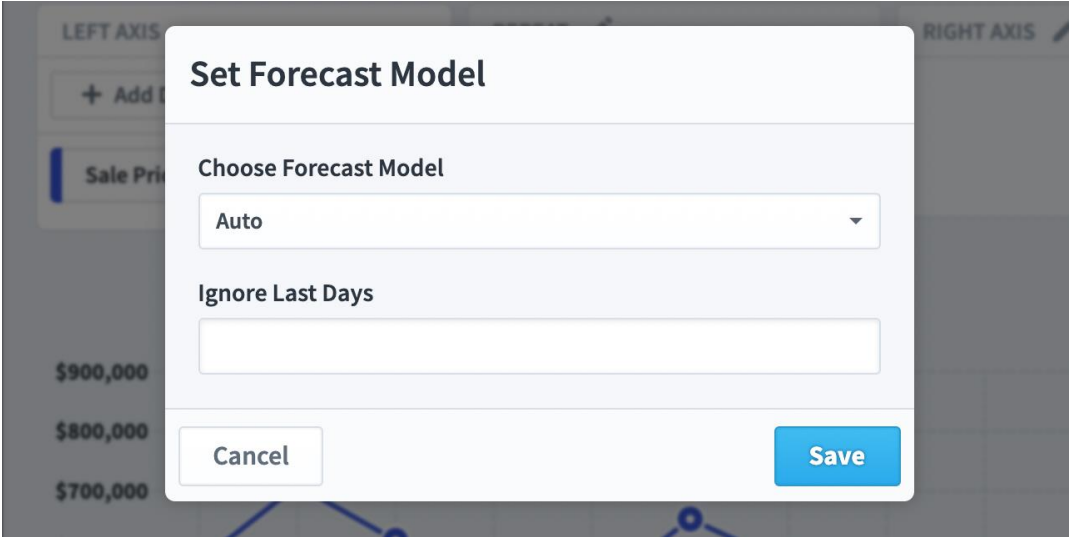
Here's an example of no trend.



You can tweak the forecast settings by choosing "Set Forecast Model".

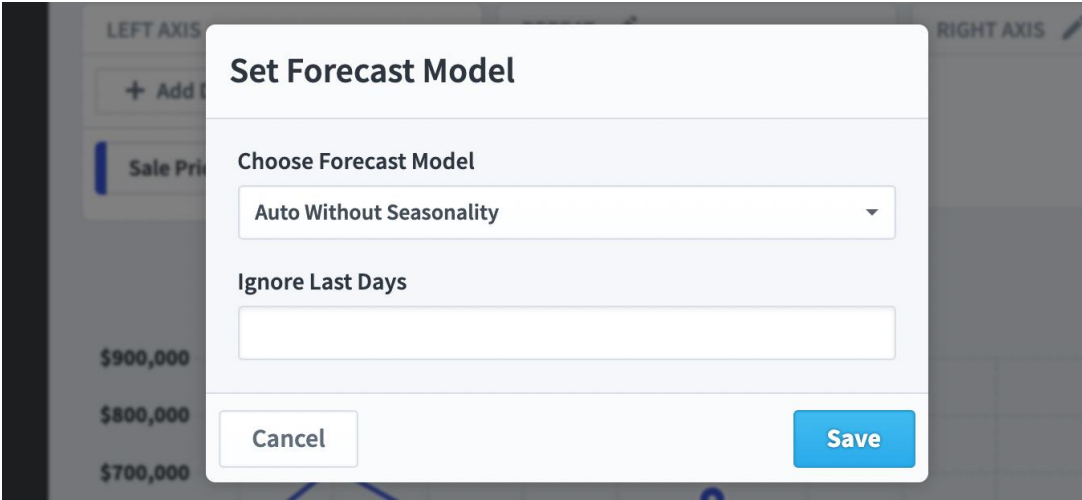


The default forecast model is Auto, and it's often all you'll need. You can also choose to ignore recent days, which is helpful for data sources where recent data is still in flux.



When the model is set to Auto, Spider Impact tries out several algorithms and chooses the best fit. If it doesn't detect a trend, it uses Simple Exponential Smoothing. If it detects a trend but no seasonality, it uses Holt's linear trend (also known as Double Exponential Smoothing). If it detects seasonality, it uses the Holt-Winters model (also known as Triple Exponential Smoothing). Both trend and seasonality are additive, as opposed to multiplicative.

If you prefer to choose the algorithms yourself, you can definitely do that. Auto Without Seasonality just means it prevents Spider Impact from detecting seasonality.



When you choose a Custom model, you can choose Ignore or Additive for trend and season. If you choose Additive for season, you can also choose if your seasonality is quarterly, yearly, etc.

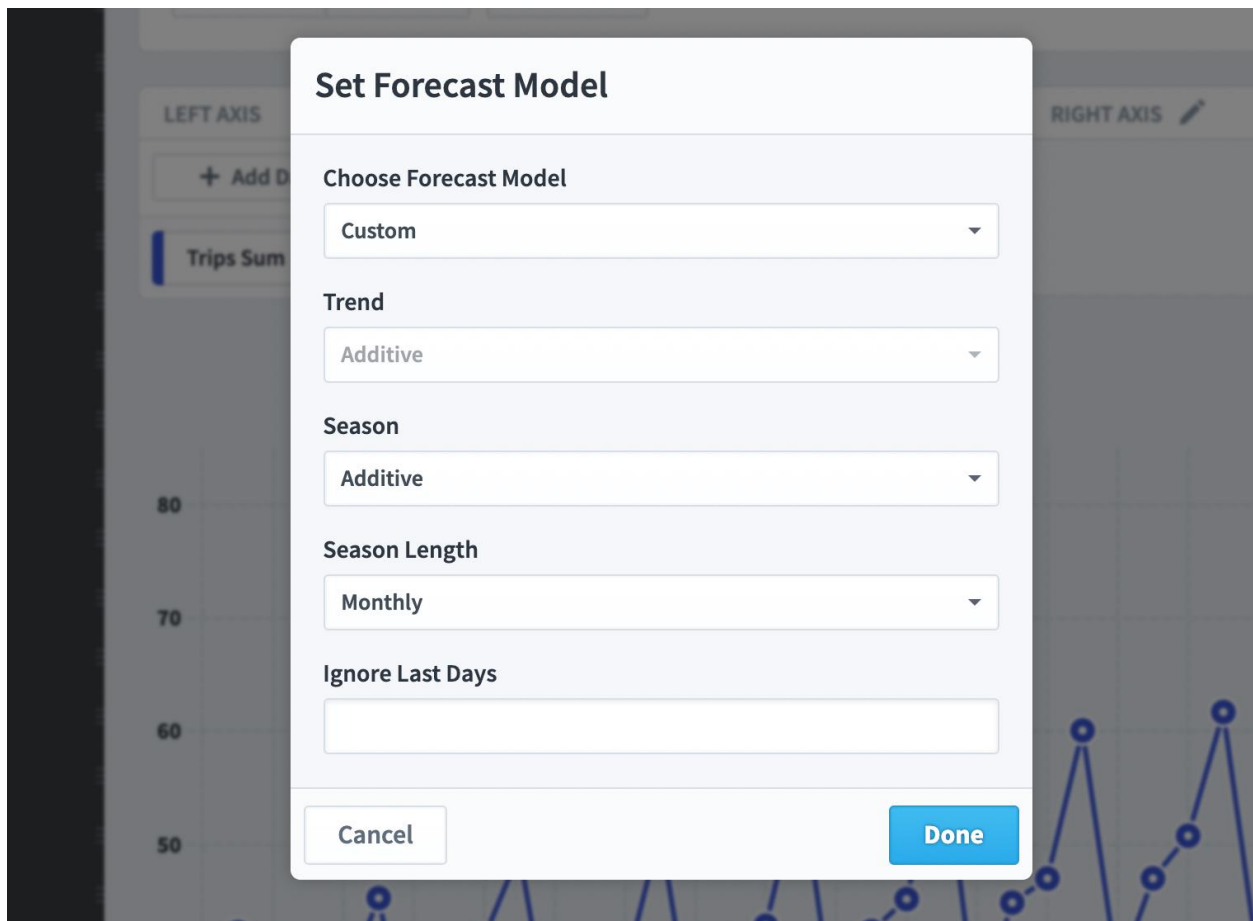
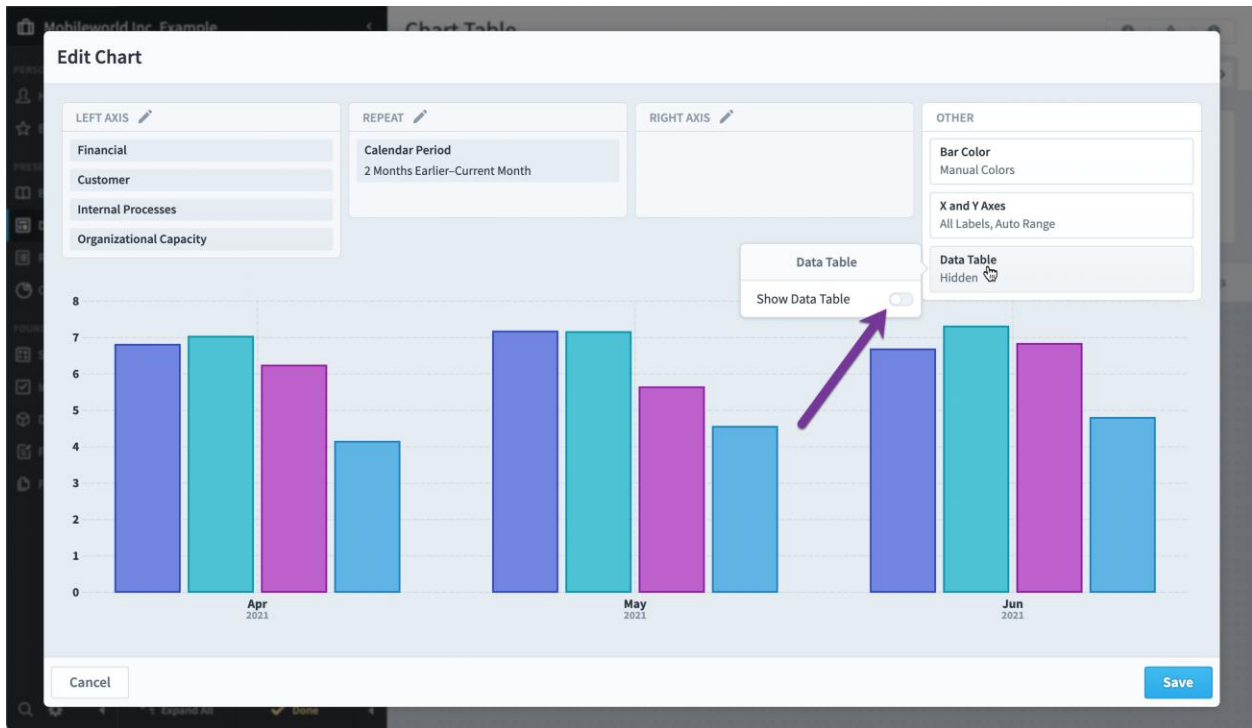


Chart data table

To add a data table to a chart, turn on the "Show Data Table" switch in the chart's Other panel.



On dashboards, the data table is separately configurable with options to adjust the font and margin sizes.

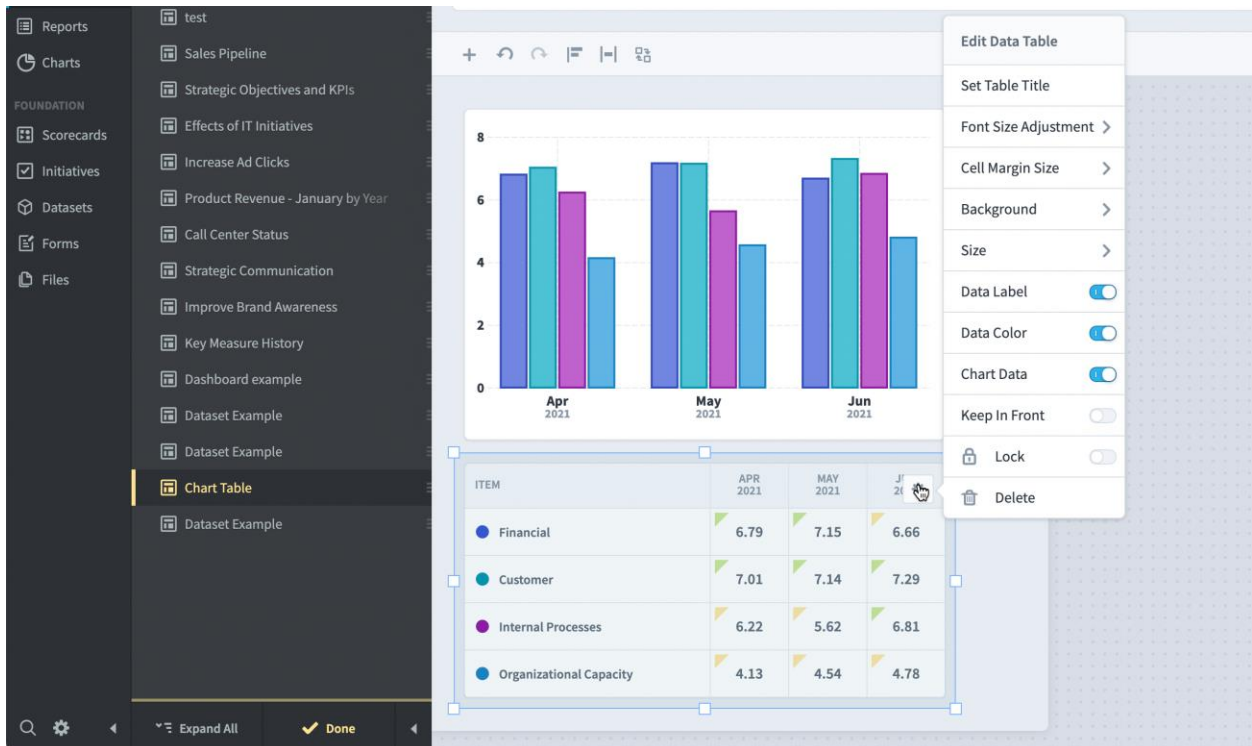
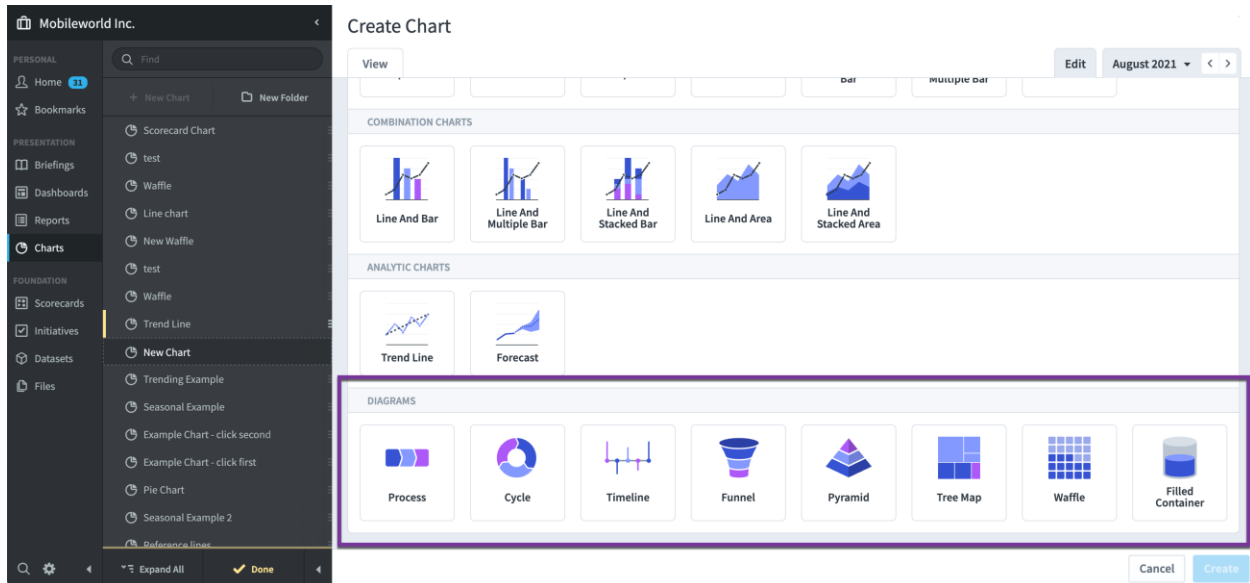


Diagram charts

There are 8 new diagram charts that you can choose from when creating a new chart. These infographic-style charts are great for visualizing processes, relationships, or percentages.

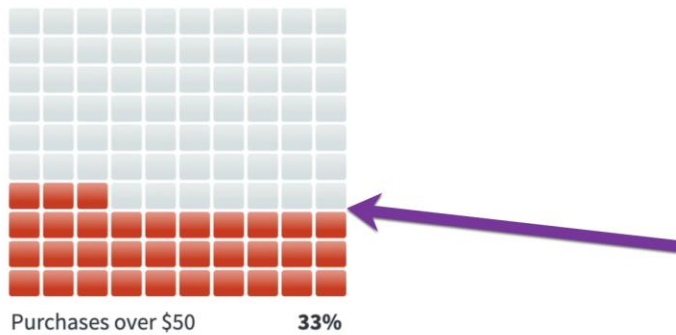


All diagram charts have similar configuration options. We'll cover the waffle chart in detail first, and then summarize the other charts.

Waffle charts

Waffle charts are particularly good at showing percentages. Like all diagram charts, they can be used in the Charts section on their own, but they're most useful on dashboards.

Waffle



COSTS



OPERATING EXPENSES

\$5,313



\$243K



\$64.7K

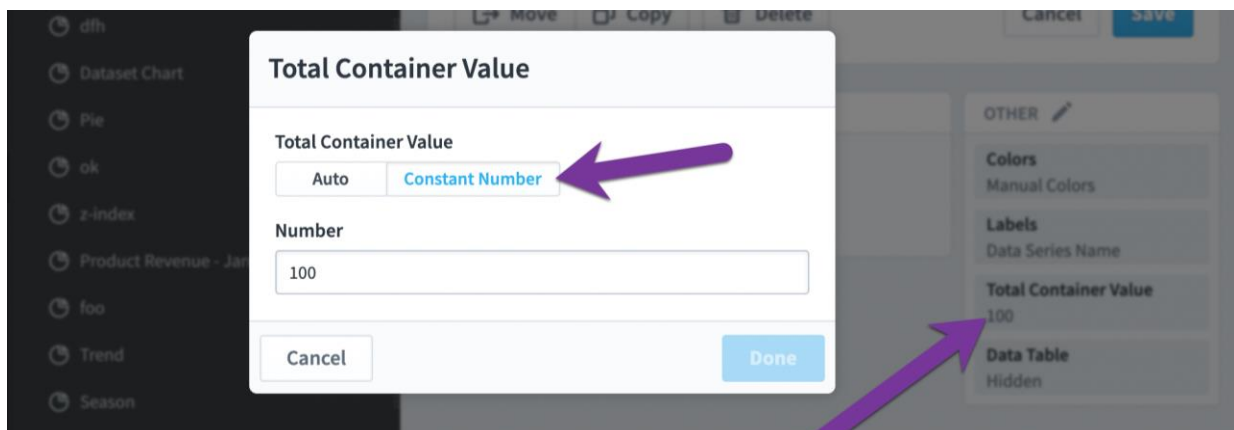


\$46.1K

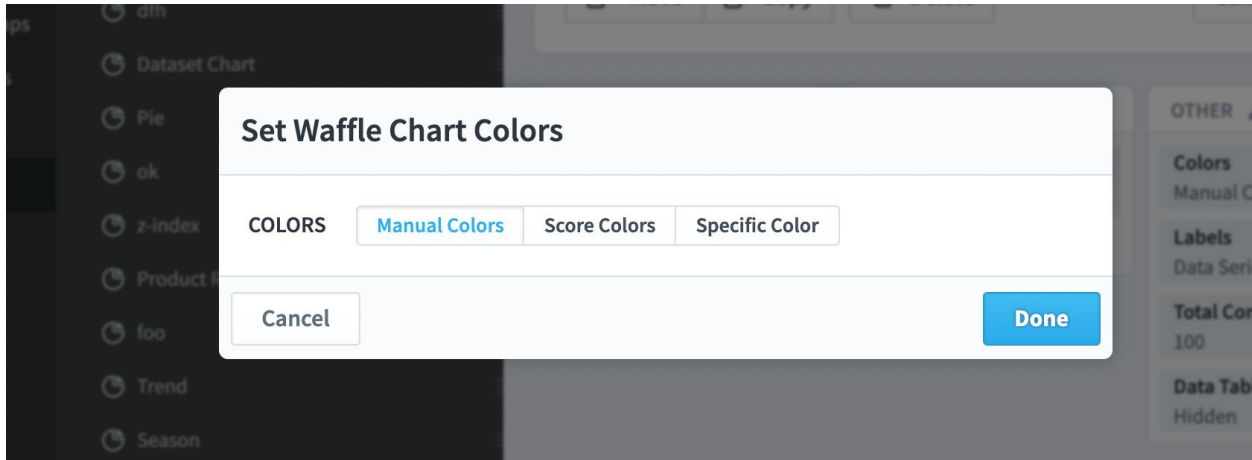


As with all charts, waffle charts can show data from scorecard items, initiatives, and datasets.

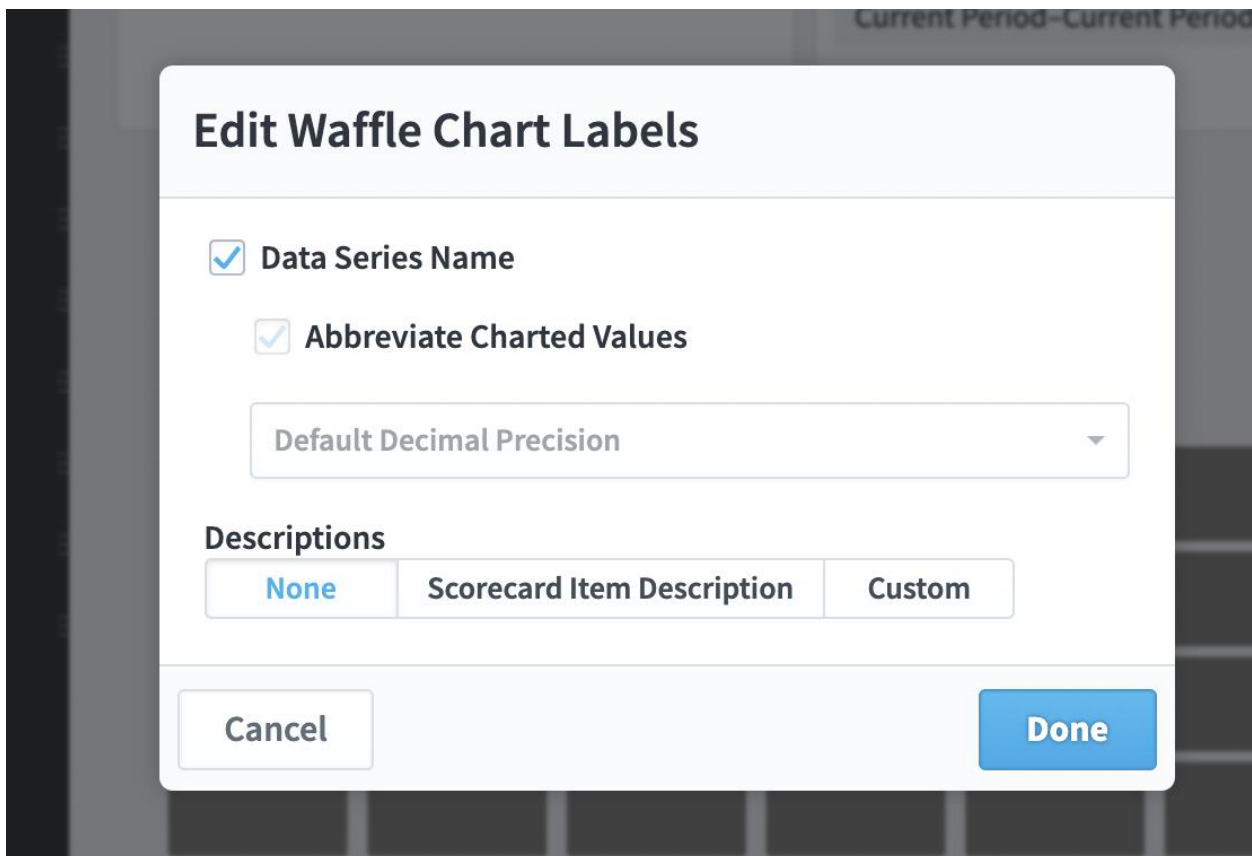
The size of the container will automatically adjust based on your data. For example, if your data series is a percentage or has a value between 0 and 1, waffle charts will assume your data is a percentage and will set the container size to 100%. You can also choose a specific container size by clicking on "Total Container Value" in the Other panel.



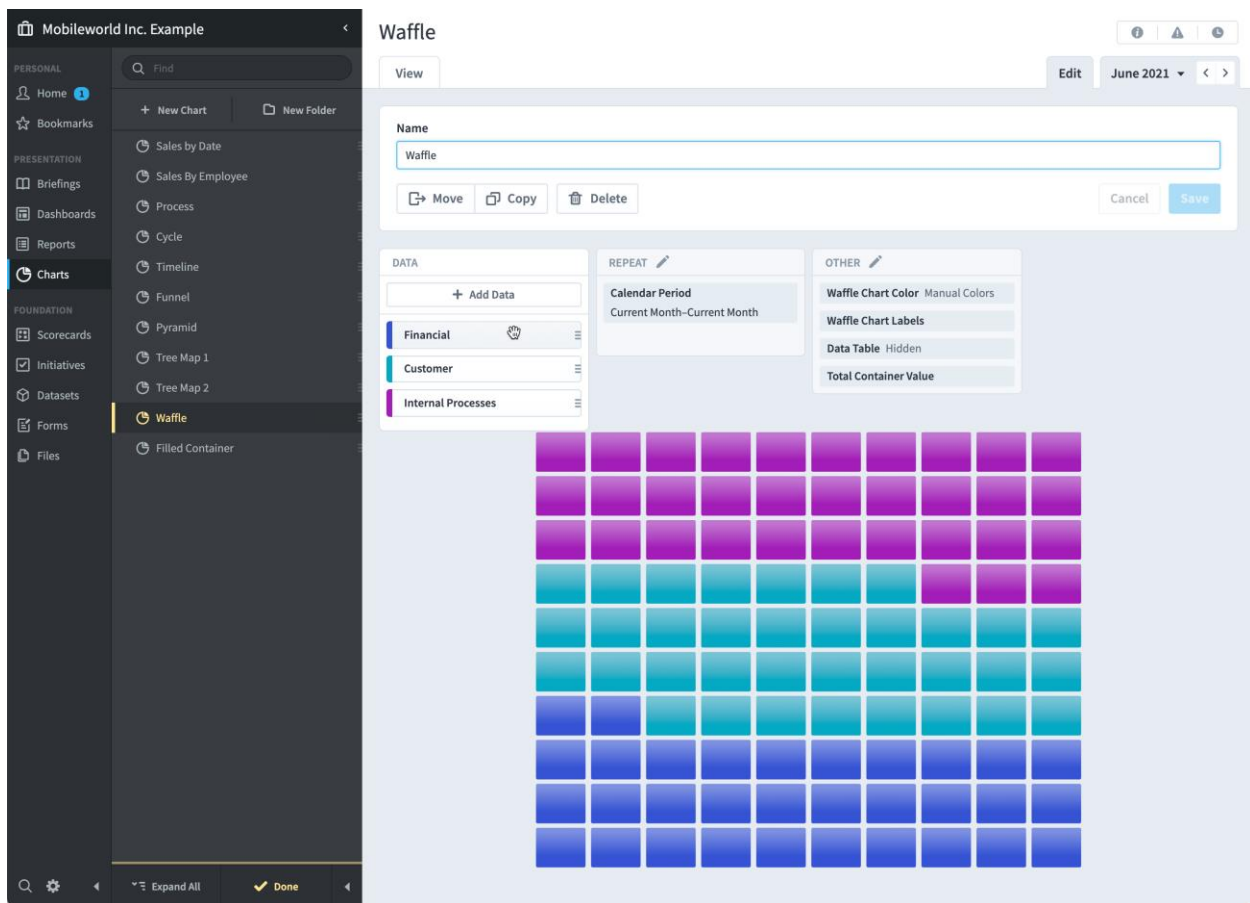
Just like every other chart, you can choose to color the filled squares manually or by performance.



You can also configure what labels to show and how to show them.

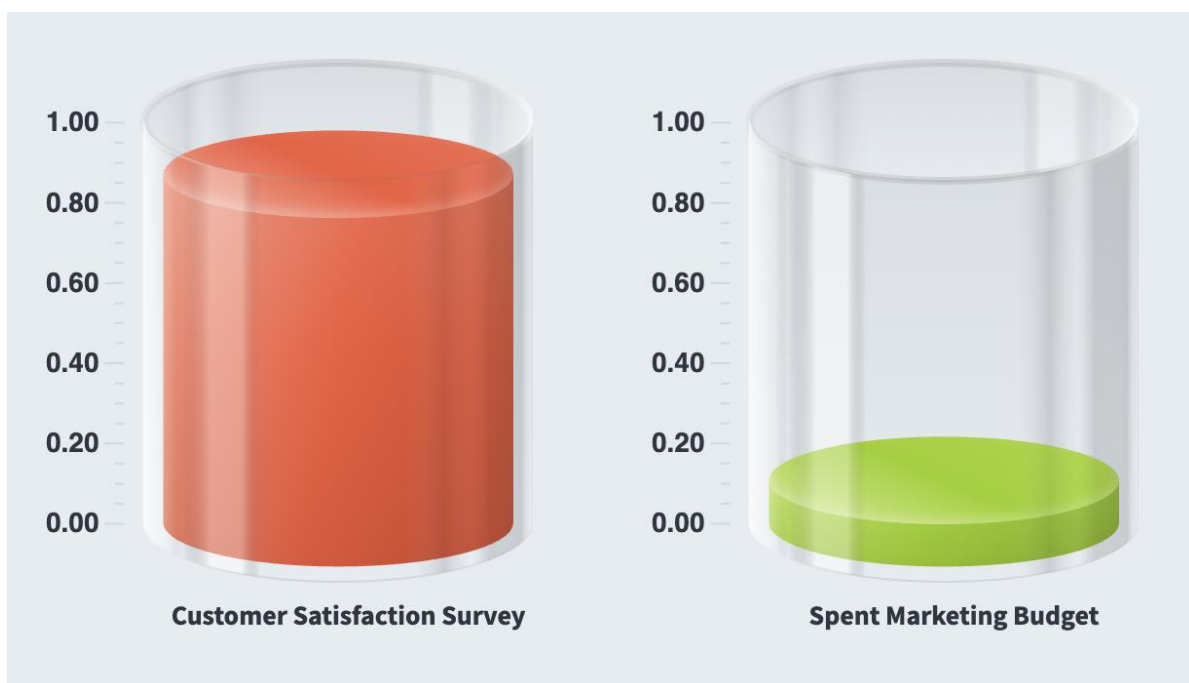


You can even add multiple data series to a waffle chart. In this example we're showing three different data series.



Filled container chart

Filled container charts visualize your data as liquid in a container. They are configured exactly the same as waffle charts.



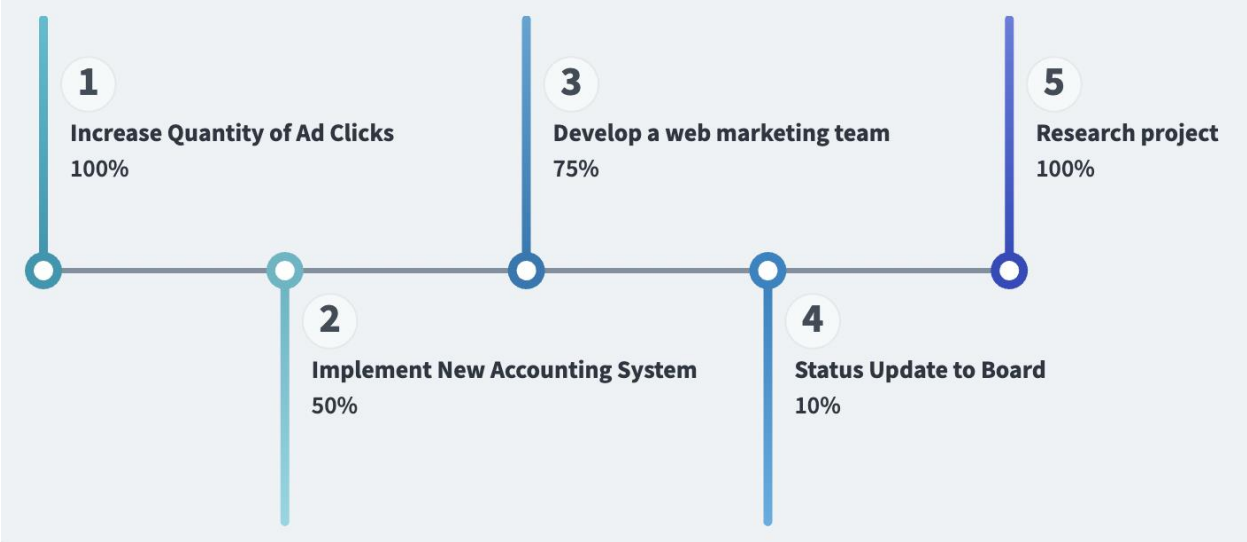
Process chart

Process charts show a series of discrete stages with a clear progression from one step to the next. Each stage is represented by a chart data series.



Timeline chart

Timeline charts are similar to process charts, but they're better at visualizing specific events. Like all charts, however, the timeline chart can still show data from scorecard items, initiatives, and datasets.



Cycle chart

Cycle charts are great at showing repeating processes.



Pyramid chart

Pyramid charts visualize data that builds on a previous level. Like all charts, they can be colored based on performance...

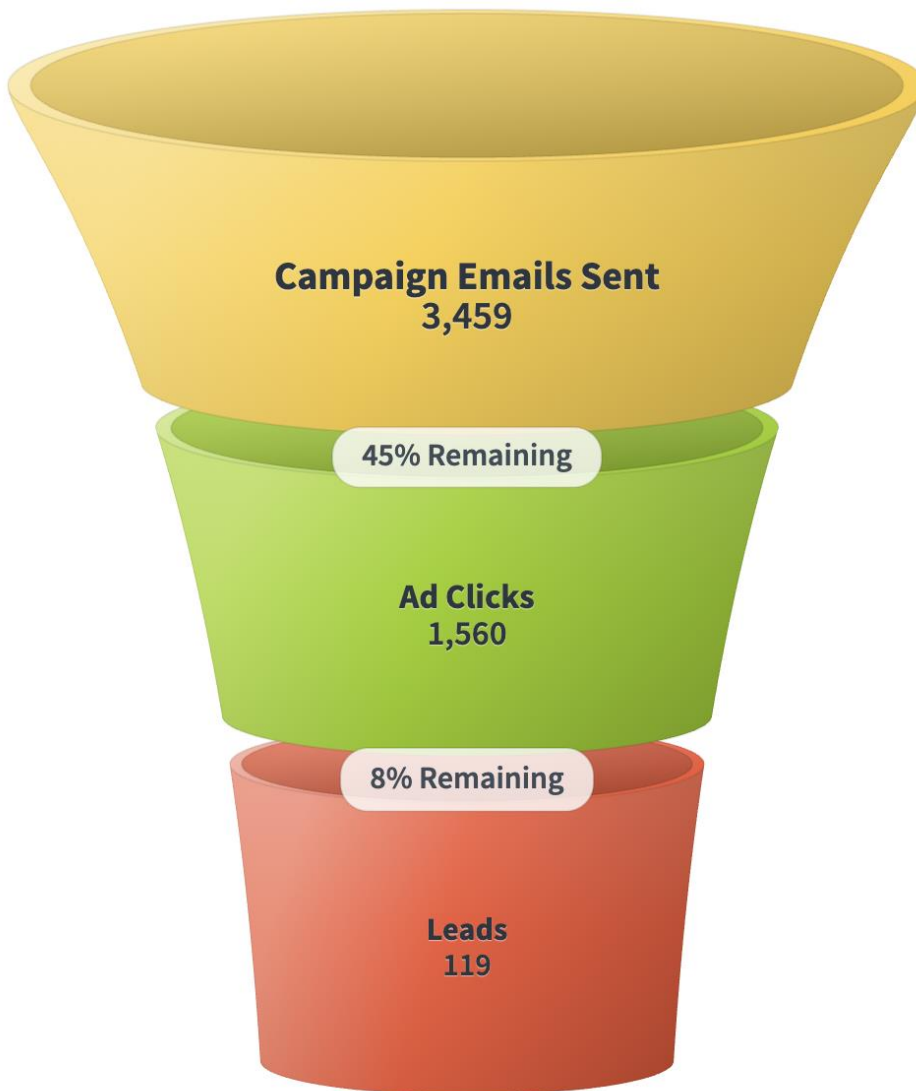


... or they can be colored based on manually chosen colors.



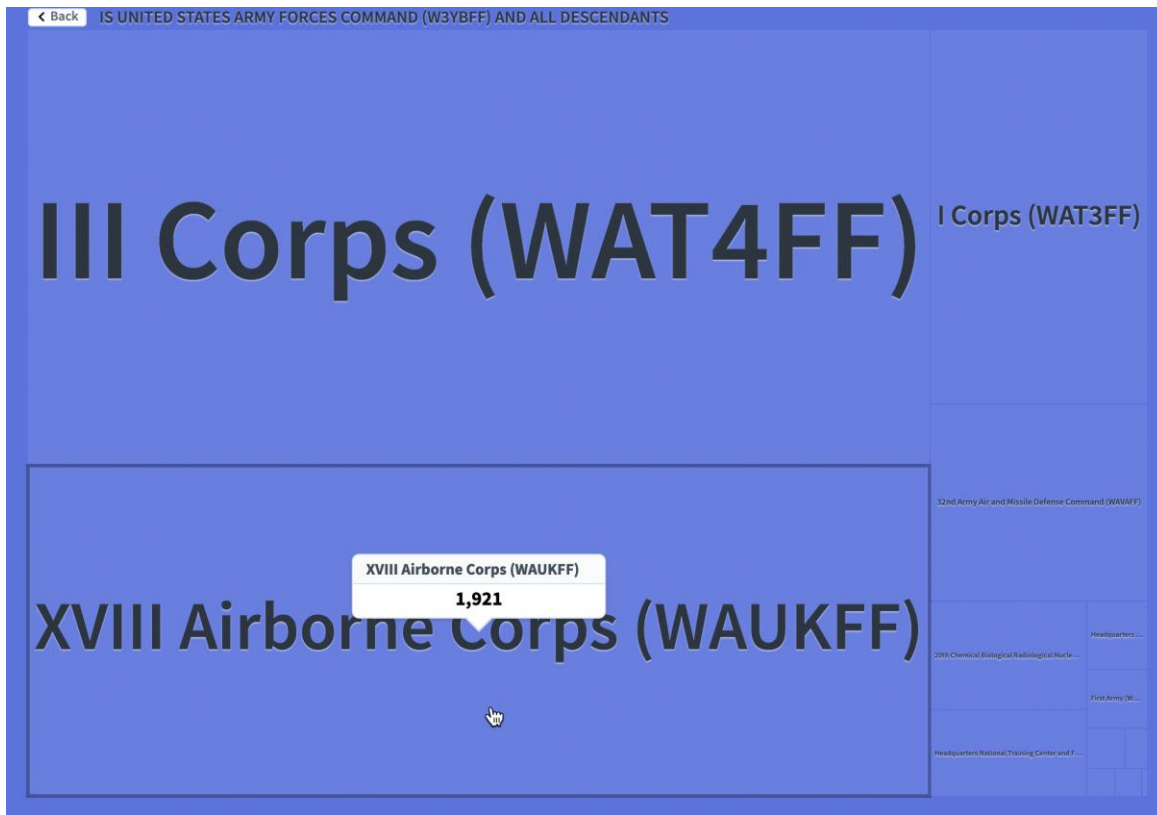
Funnel chart

Funnel charts visualize a process where numbers decrease. The chart can automatically show the percentage remaining between stages.

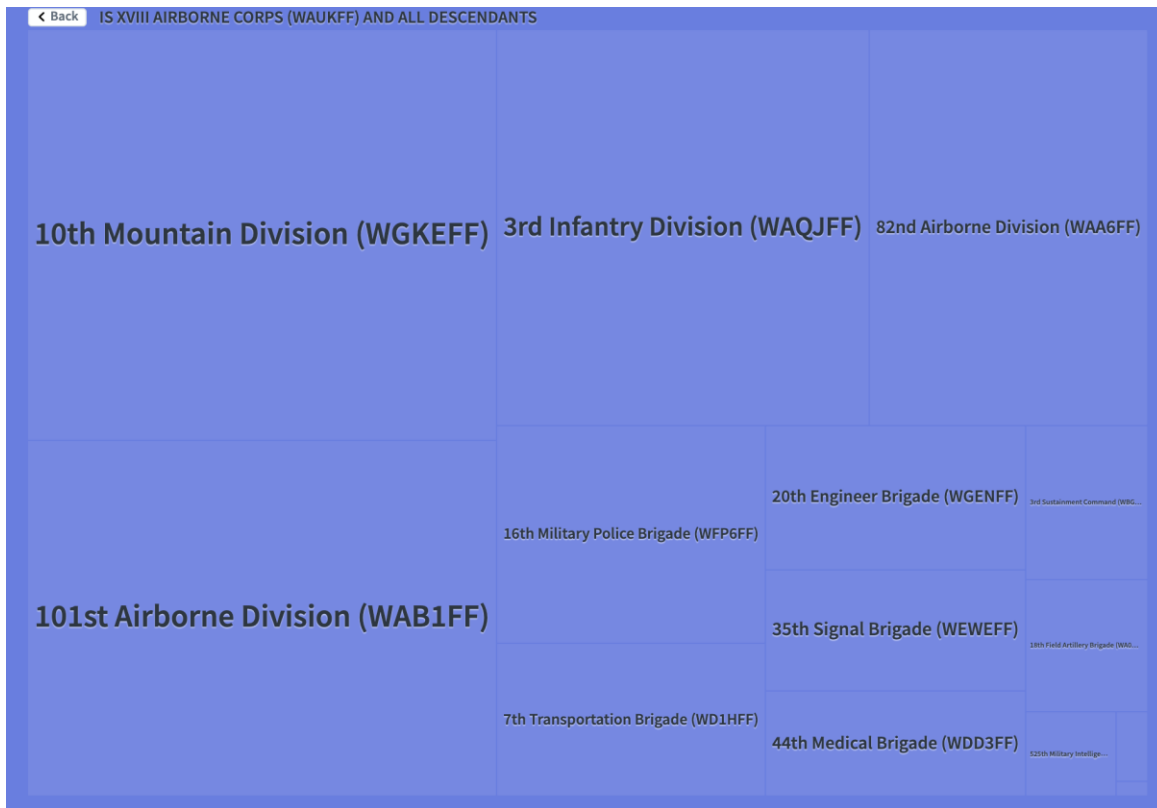


Treemap chart

Treemap charts are slightly different than the other diagram charts because they only show data from dataset rollup trees. They work by showing the relative size of data at various levels of the tree. In this example we're showing data for a military organization, and we're about to click on a box to drill down.



Spider Impact plays a drilldown animation, and you can then see that item's children in the rollup tree.

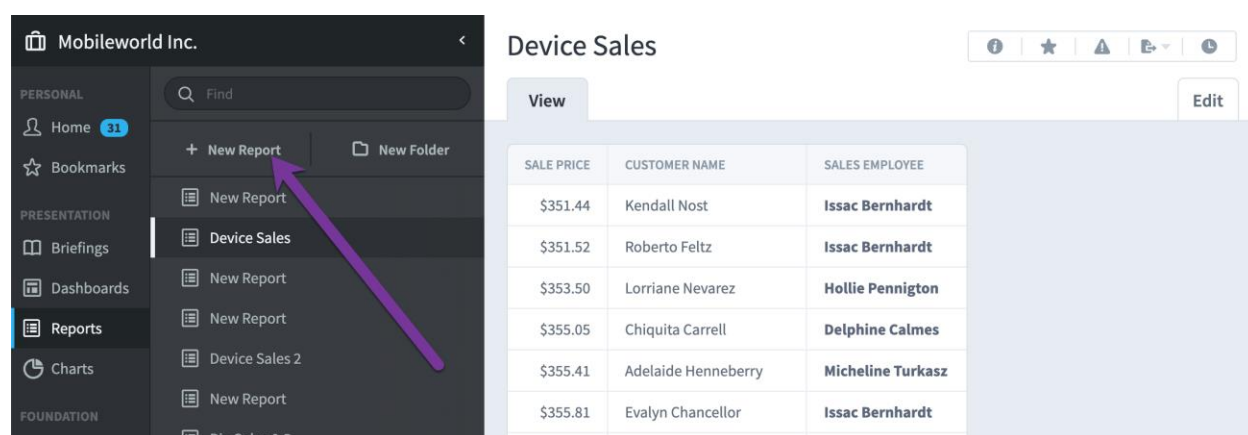


Reports

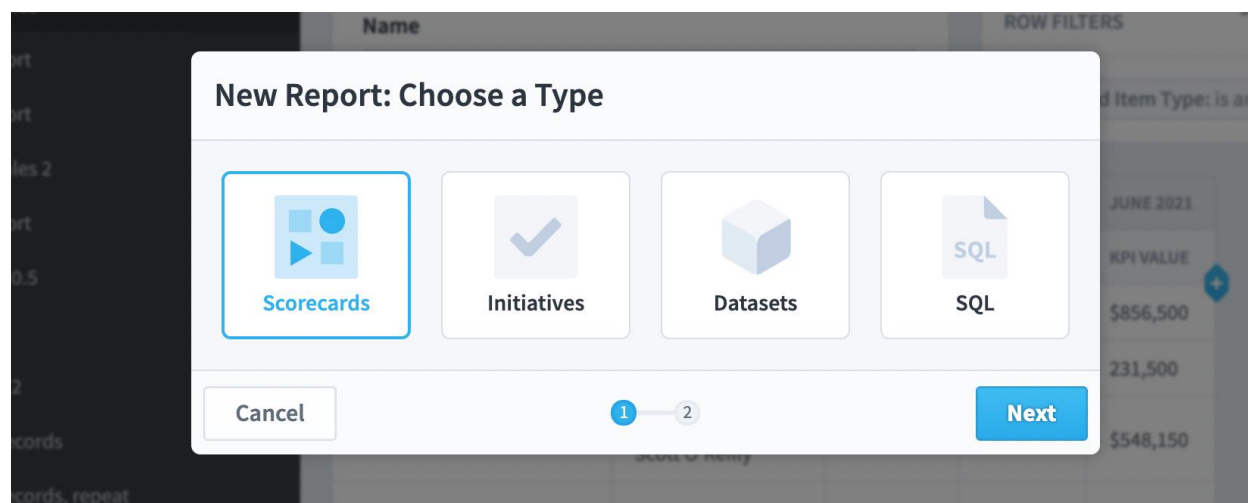
Reports in Spider Impact 5 are completely new and represent a major step forward in functionality. They show data for Scorecard items, Initiative items, and Datasets. They have formatting, grouping, sorting, filtering, and aggregating. In short, Spider Impact now has a full-featured report designer for all of the data it tracks.

Creating a report

To create a new report, click the "New Report" button in the Reports section.

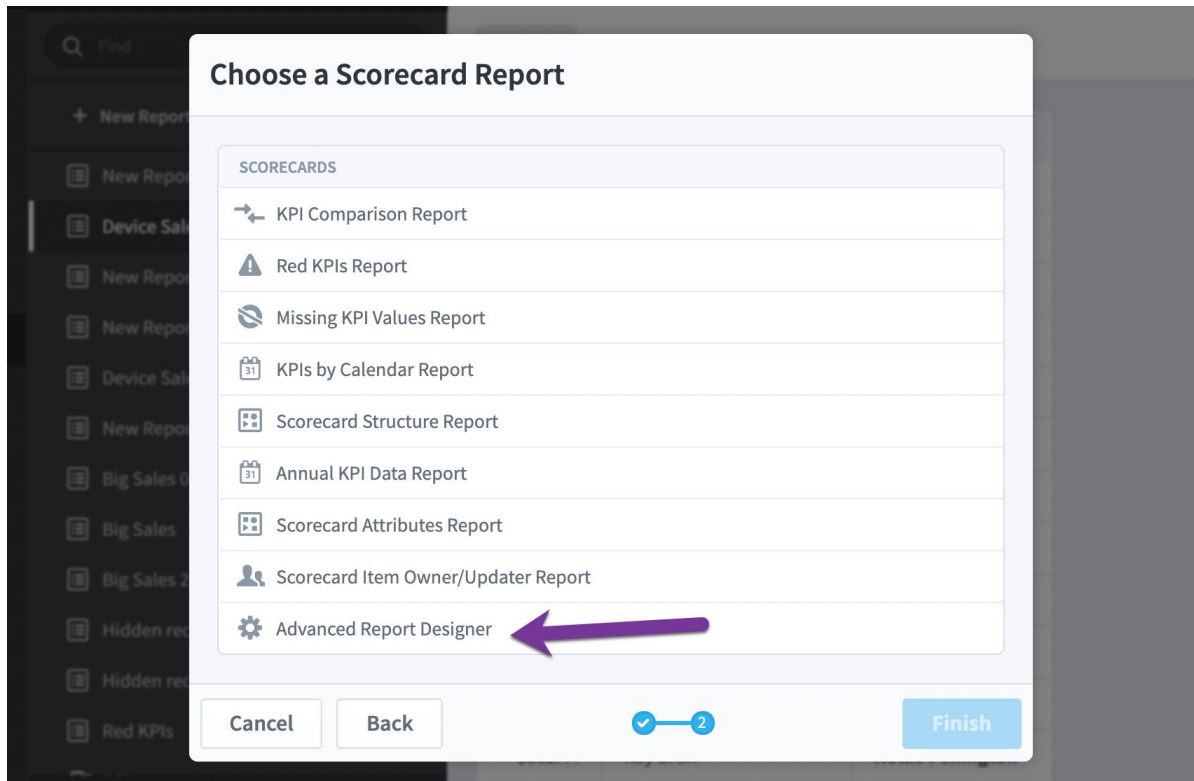


Each report is for a single type of data. First, we'll choose Scorecards.

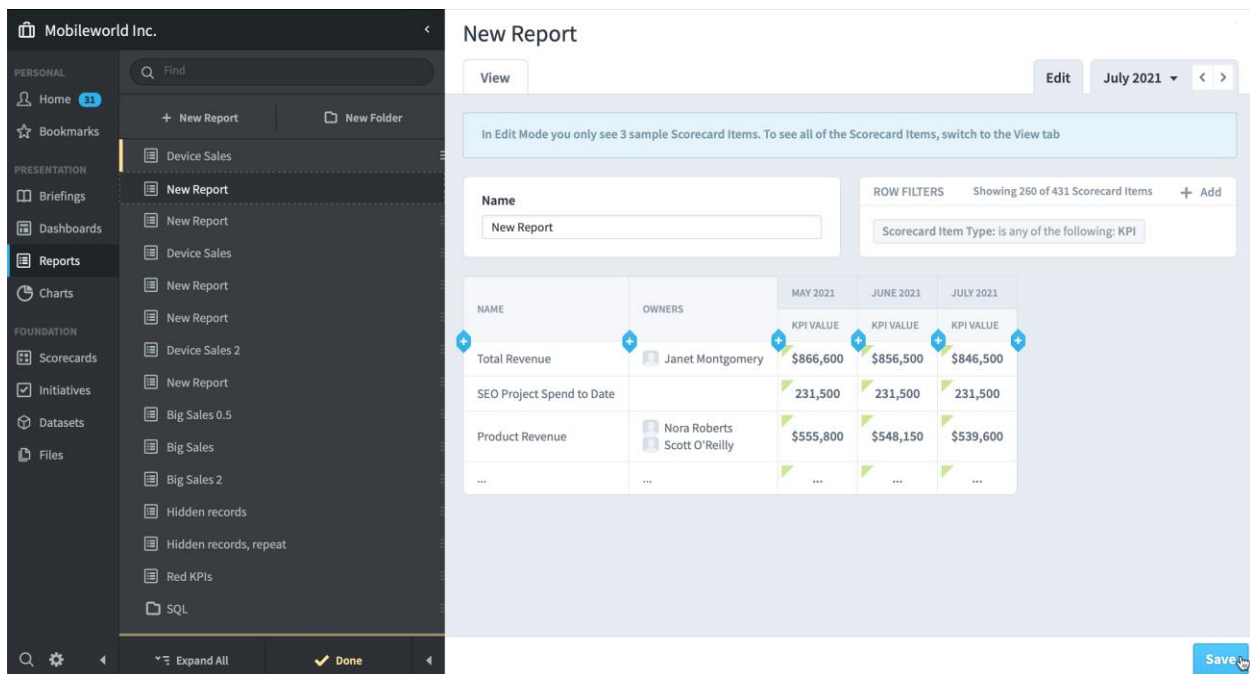


You can choose between several pre-built reports like the Red KPIs report and Missing KPI Values report. These reports get you started with "canned" reports

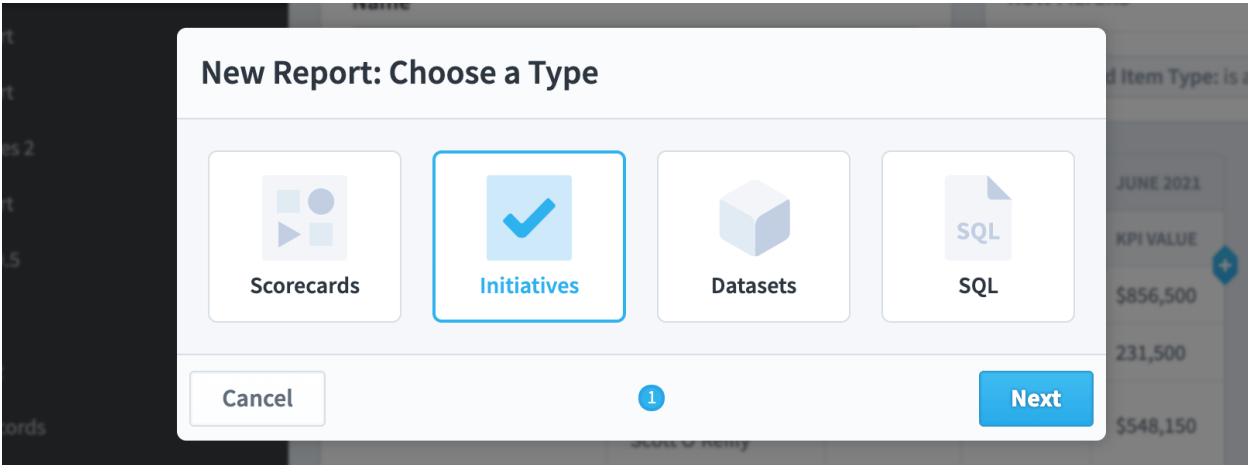
that you can configure. Instead, we'll build a report from scratch by choosing the Advanced Report Designer option on the bottom.



The Advanced Report Designer for scorecard items starts by showing the scorecard item name, owners, and three periods of data for all KPIs.



Let's start a new report, and this time we'll choose Initiatives.

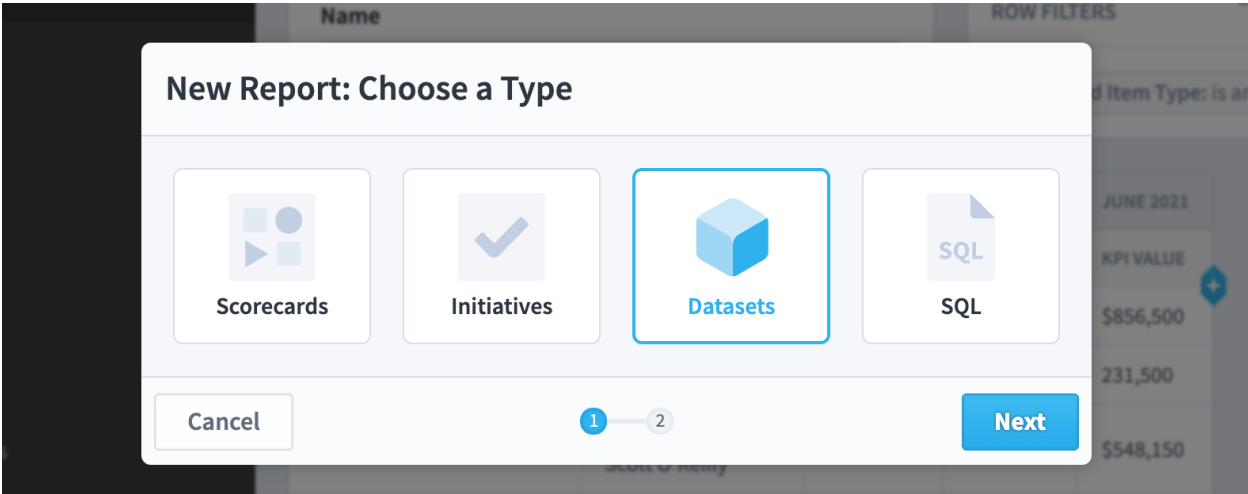


A new Initiatives report starts with showing the budget and schedule information for all non-archived initiative items.

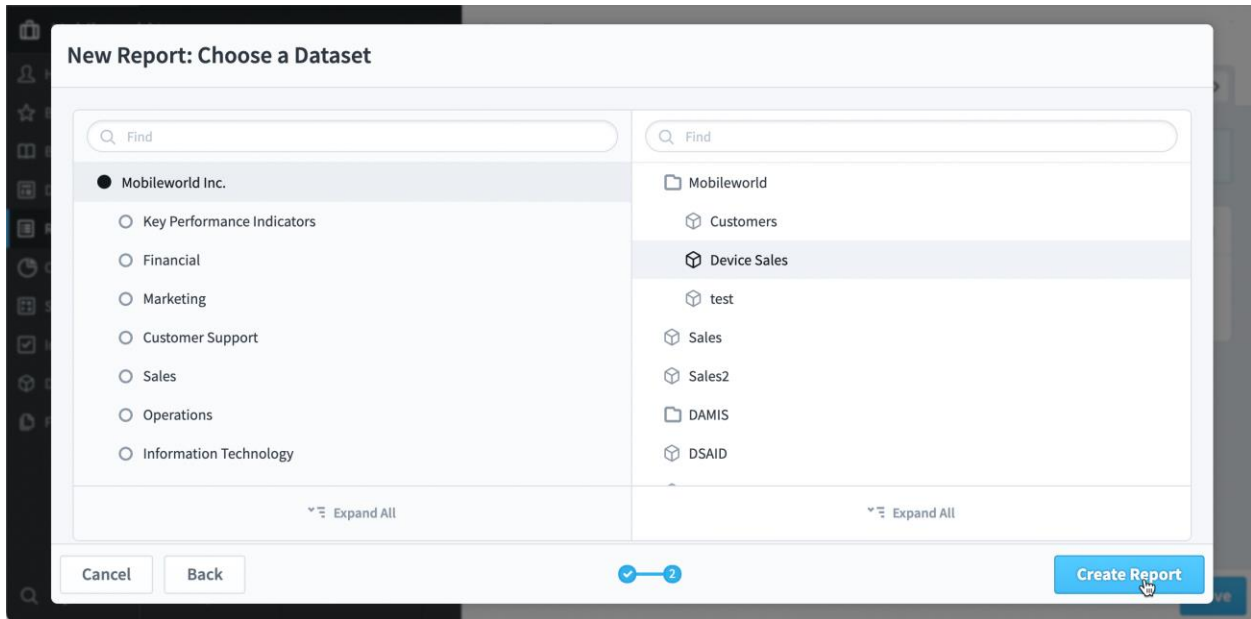
The screenshot shows a report interface with a table of initiative items. The table has columns for Name, Assigned Users and Groups, Projected Budget Variance, and Projected Schedule Variance. A filter is applied for "Archive Status: is Not Archived".

NAME	ASSIGNED USERS AND GROUPS	PROJECTED BUDGET VARIANCE	PROJECTED SCHEDULE VARIANCE
Research project and write a report		\$3,500 under budget	On schedule
Status Update to Board			
Develop a web marketing team	Sam Smith	\$42,500 under budget	19 days early
...

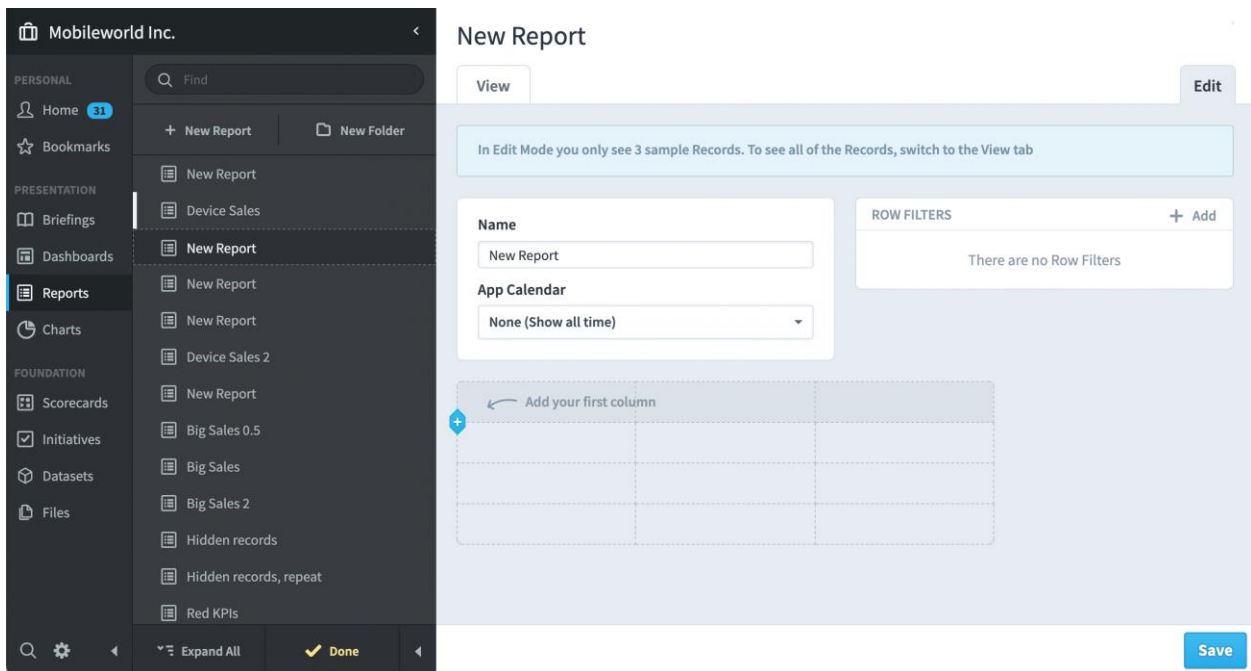
The third type of report is Datasets.



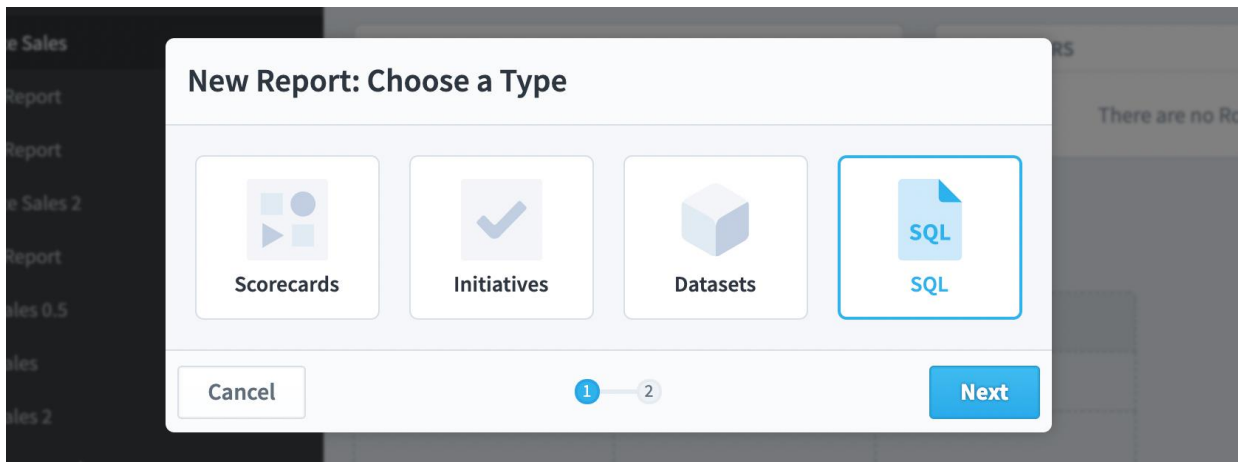
A dataset report shows data from a single dataset, which we'll choose next.



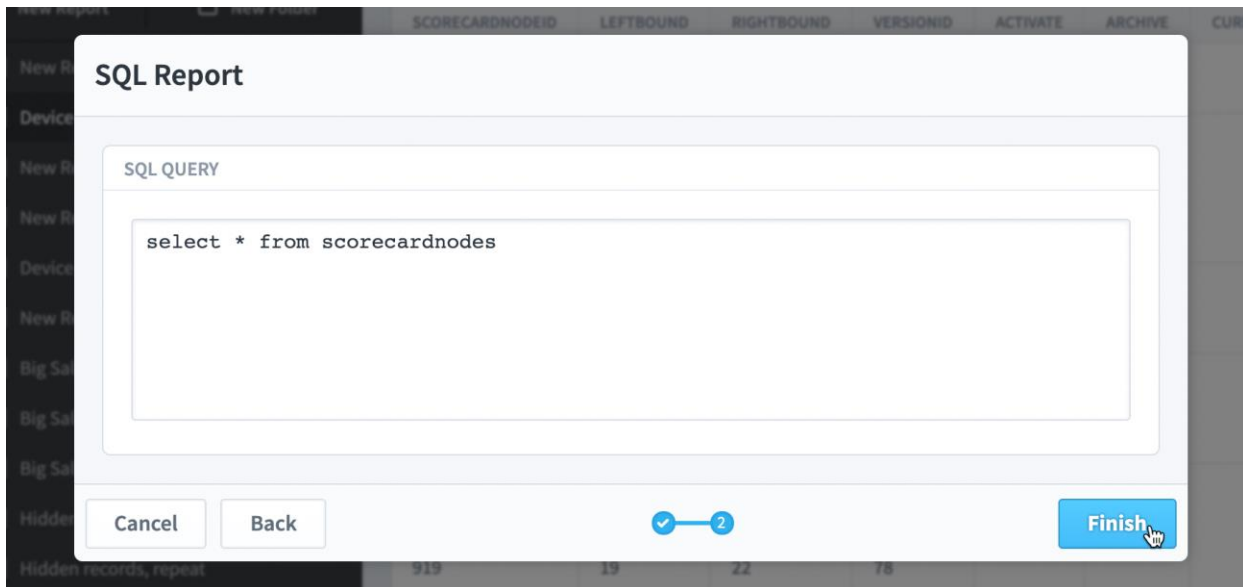
Dataset reports are a little different from Scorecard and Initiative reports because every dataset field is unique to each dataset. Because of this, dataset reports start blank.



Finally, users with the right permissions can choose SQL reports.



This allows them to write SQL queries against the Spider Impact database.



SQL reports appear the same as other reports, except they can't have advanced formatting.



The View and Edit tabs

Regardless of whether you're writing reports for Scorecards, Initiatives, or Datasets, the general flow is the same. The Reports Edit tab always shows the first three records so you can get a preview of what your report will look like.

In Edit Mode you only see 3 sample Scorecard Items. To see all of the Scorecard Items, switch to the View tab

ROW FILTERS Showing 290 of 436 Scorecard Items + Add

Scorecard Item Type: is any of the following: KPI

NAME	OWNERS	MAY 2021	JUNE 2021	JULY 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue		\$697,574	\$697,974	\$701,874
SEO Project Spend to Date		231,500	231,500	231,500
Product Revenue	Full User	\$443,424	\$441,624	\$442,224
...

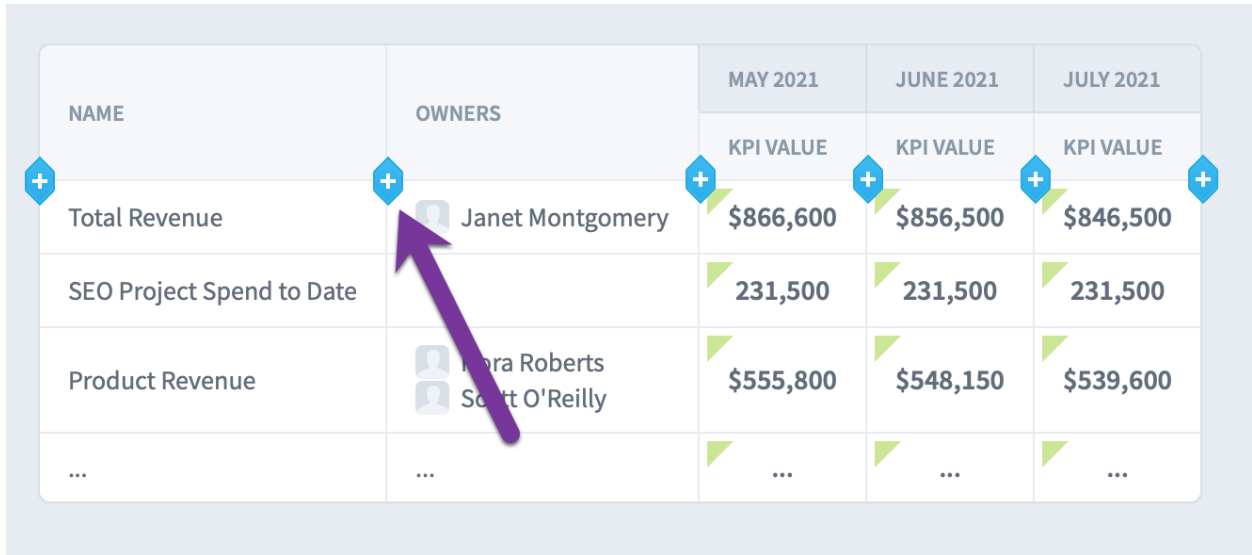
When you switch to the View tab, you'll see your entire report.

View Edit July 2021 < >

NAME	OWNERS	MAY 2021	JUNE 2021	JULY 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue		\$697,574	\$697,974	\$701,874
SEO Project Spend to Date		231,500	231,500	231,500
Product Revenue	Full User	\$443,424	\$441,624	\$442,224
Training Revenue	Full User	\$229,900	\$231,050	\$234,050
Book Revenue	Full User	\$24,250	\$25,300	\$25,600
Product Costs		\$275,799	\$275,832	\$275,732
Training Venue Costs		\$39,590	\$39,181	\$38,606
Book Production Costs		\$8,339	\$7,905	\$7,797
Total Costs		\$321,533	\$322,833	\$323,758

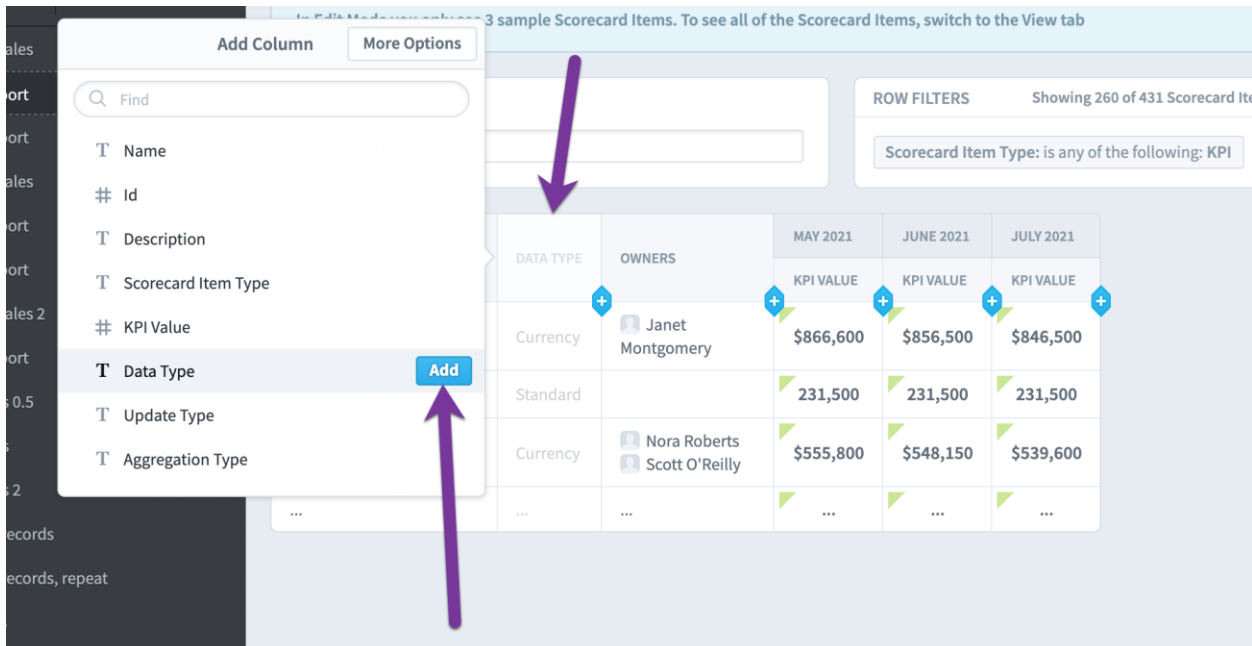
Adding and reordering columns

To add a new column, click the "Add" button where you want the new column to go.



NAME	OWNERS	MAY 2021	JUNE 2021	JULY 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue	Janet Montgomery	\$866,600	\$856,500	\$846,500
SEO Project Spend to Date		231,500	231,500	231,500
Product Revenue	Nora Roberts Scott O'Reilly	\$555,800	\$548,150	\$539,600
...

This brings up a list of all available fields from which to create columns. Here you can see the placeholder where the new column will go, right before we click to add the "Data Type" field as a column.



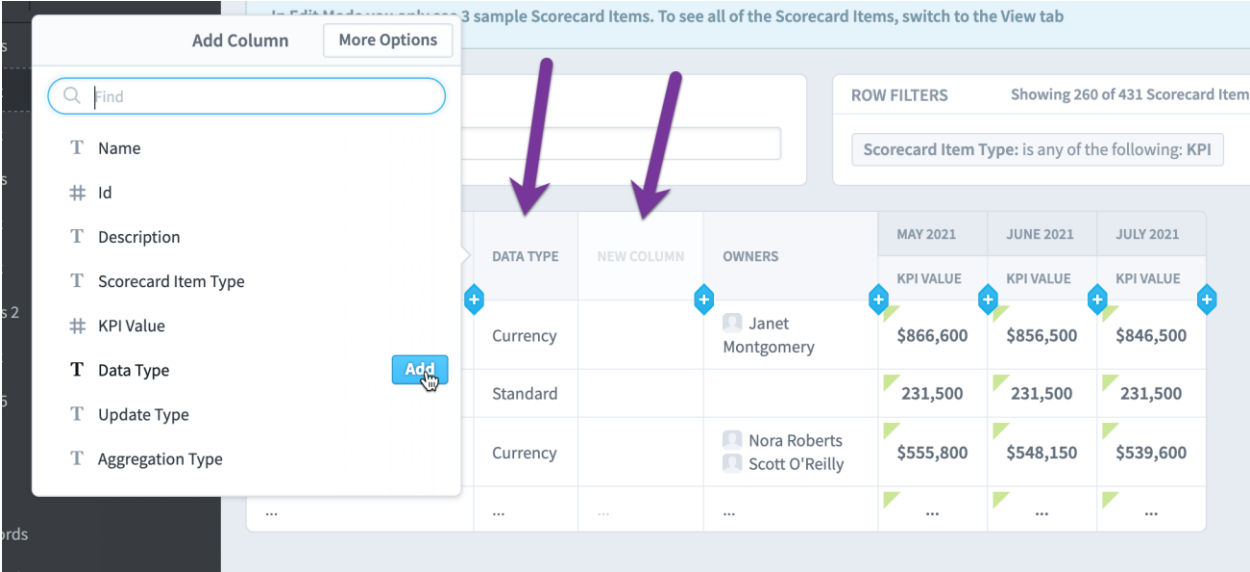
3 sample Scorecard Items. To see all of the Scorecard Items, switch to the View tab

ROW FILTERS Showing 260 of 431 Scorecard Items

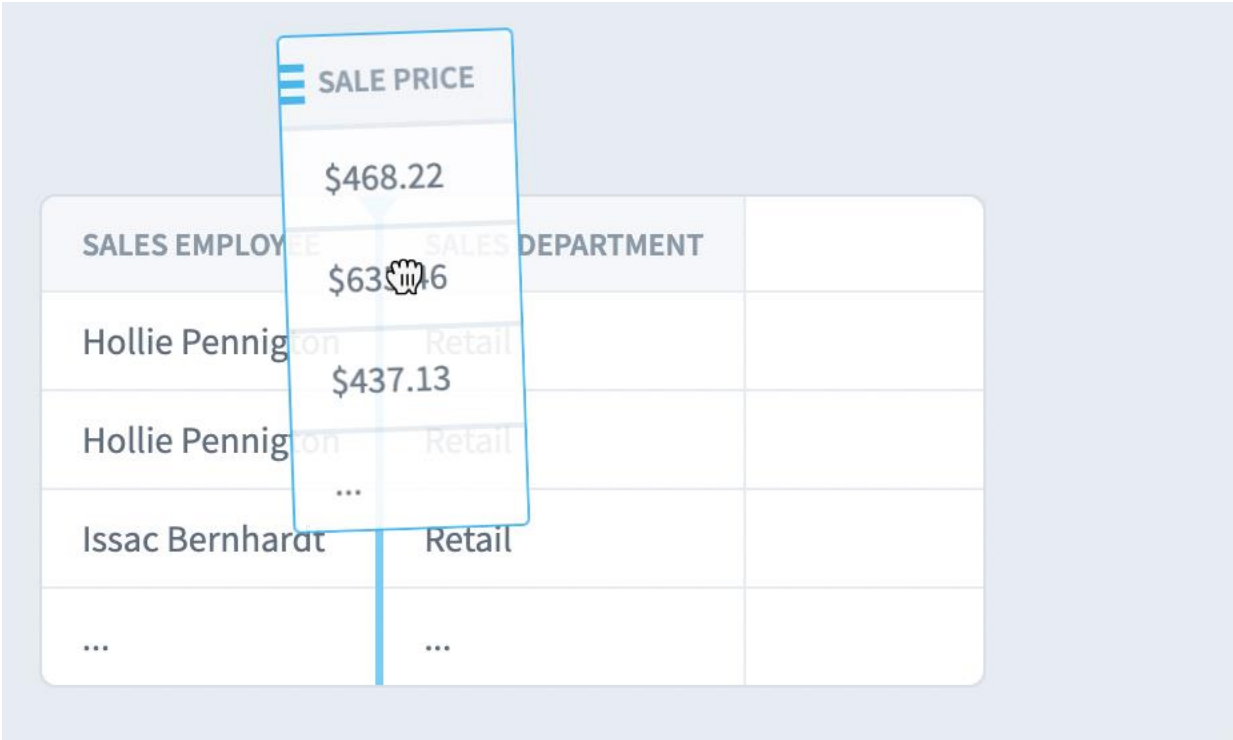
Scorecard Item Type: is any of the following: KPI

DATA TYPE	OWNERS	MAY 2021	JUNE 2021	JULY 2021
KPI VALUE		KPI VALUE	KPI VALUE	KPI VALUE
Currency	Janet Montgomery	\$866,600	\$856,500	\$846,500
Standard		231,500	231,500	231,500
Currency	Nora Roberts Scott O'Reilly	\$555,800	\$548,150	\$539,600
...

Immediately after the new column is added, the "Add Column" tooltip stays open, and you can see a new placeholder column to the right of the new column. This allows you to add multiple columns quickly with a few clicks.

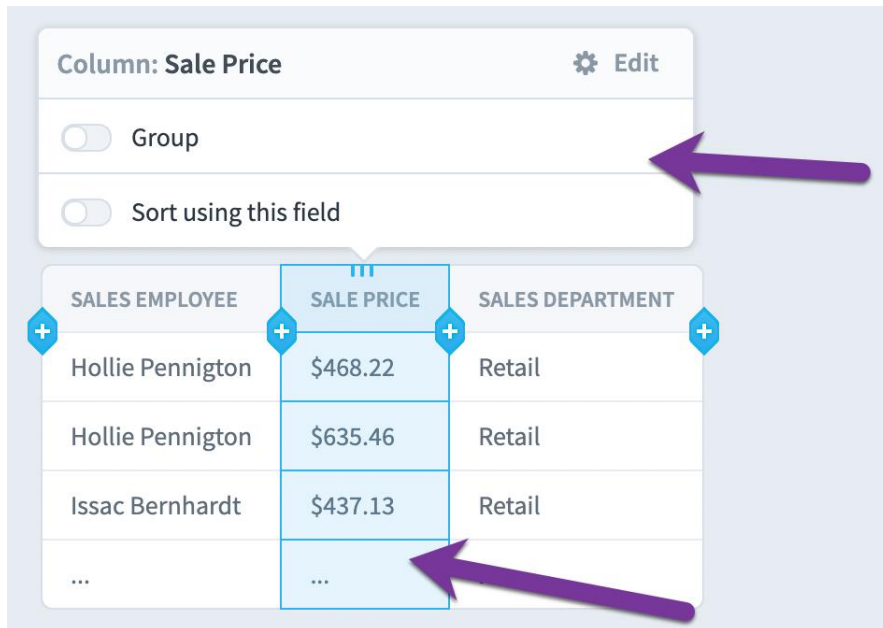


To change the order of columns, you can just drag and drop them to where you want them to be.

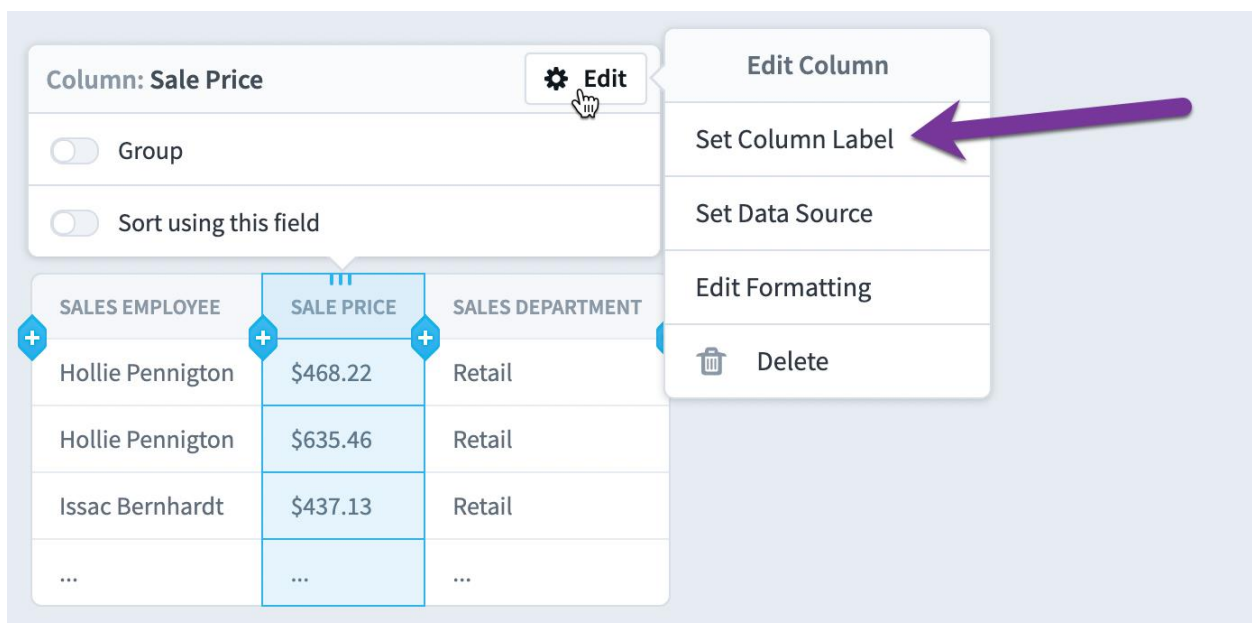


Setting column labels

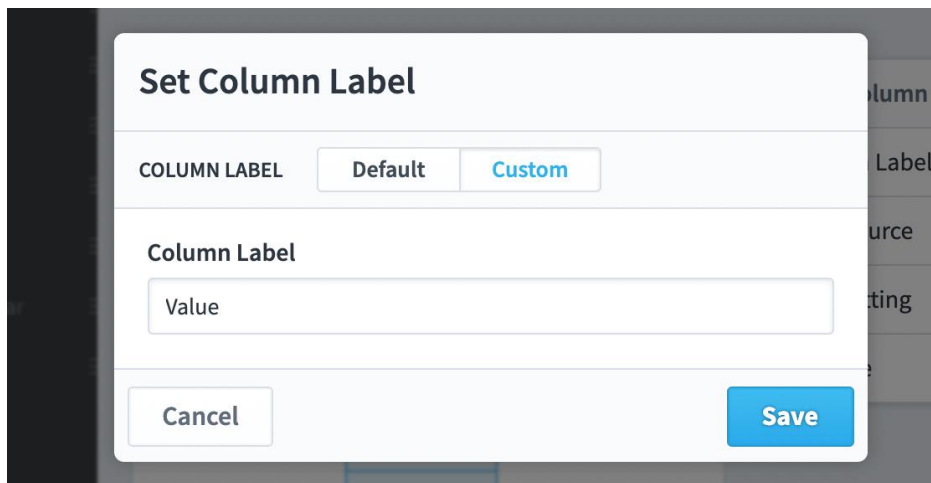
To edit a column, just click on it. You'll see the column that you're going to edit highlighted, and it shows a tooltip with your editing options.



In this example we'll click the Edit button, and we'll choose "Set Column Label."



This opens a dialog where you can choose to override the Default column label and type a value of your own. In this example we're going to change the "Sale Price" label to "Value."

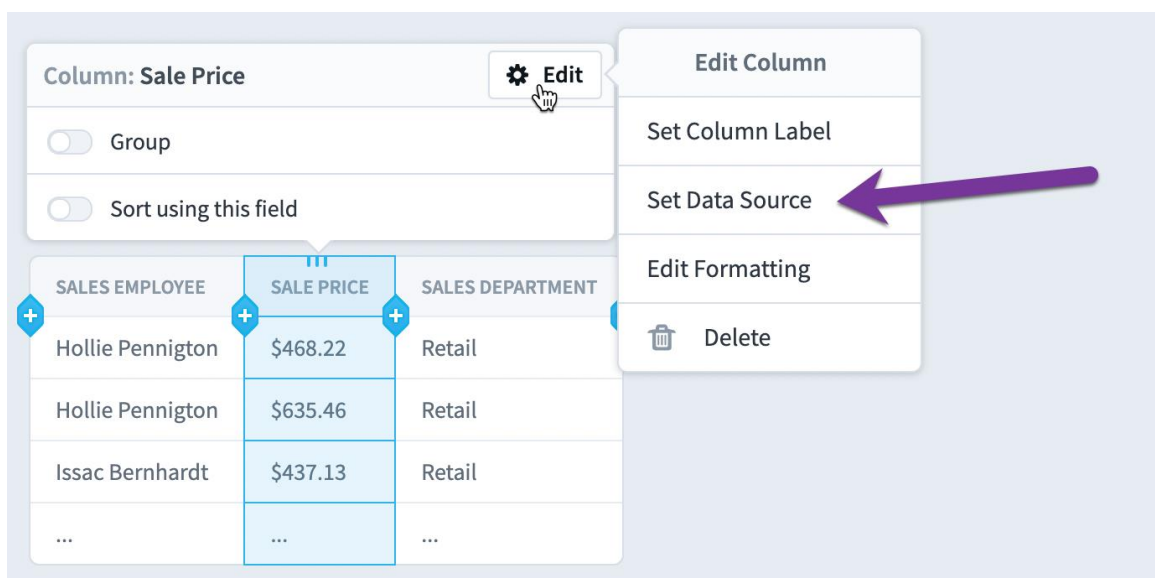


Here's what the report looks like with the new column label.

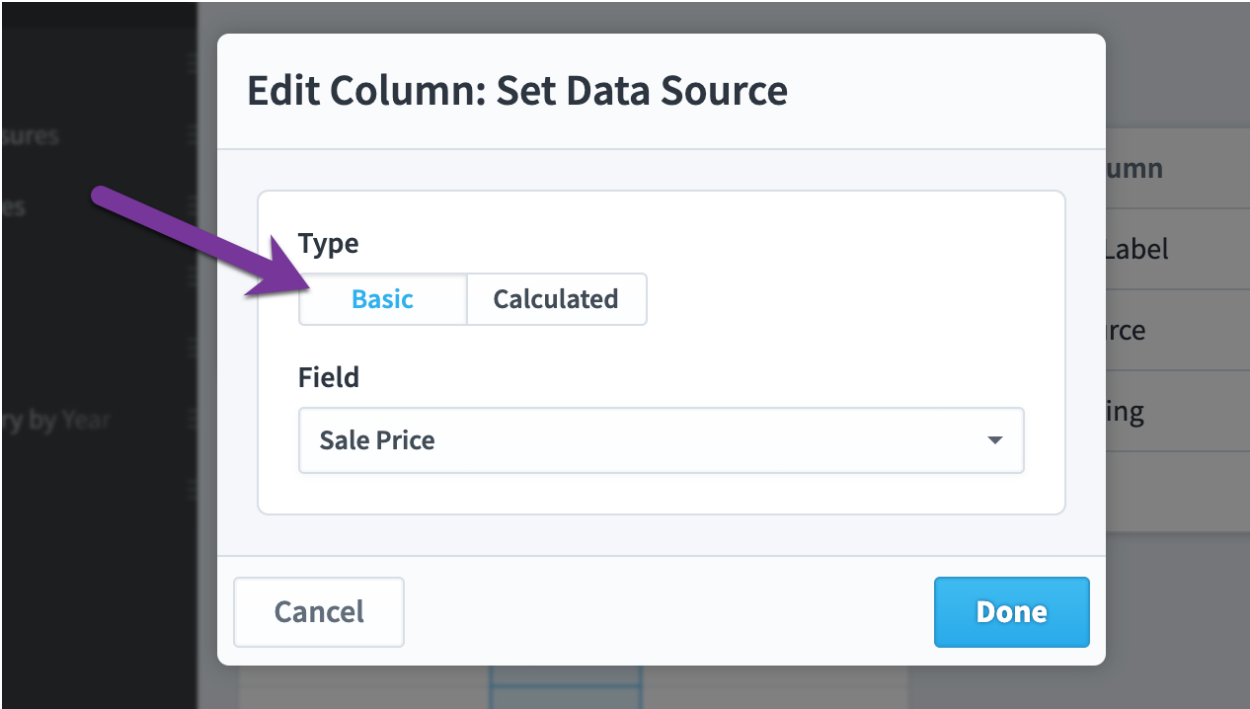
SALES EMPLOYEE	VALUE	SALES DEPARTMENT
Hollie Pennigton	\$468.22	Retail
Hollie Pennigton	\$635.46	Retail
Issac Bernhardt	\$437.13	Retail
...

Editing column data

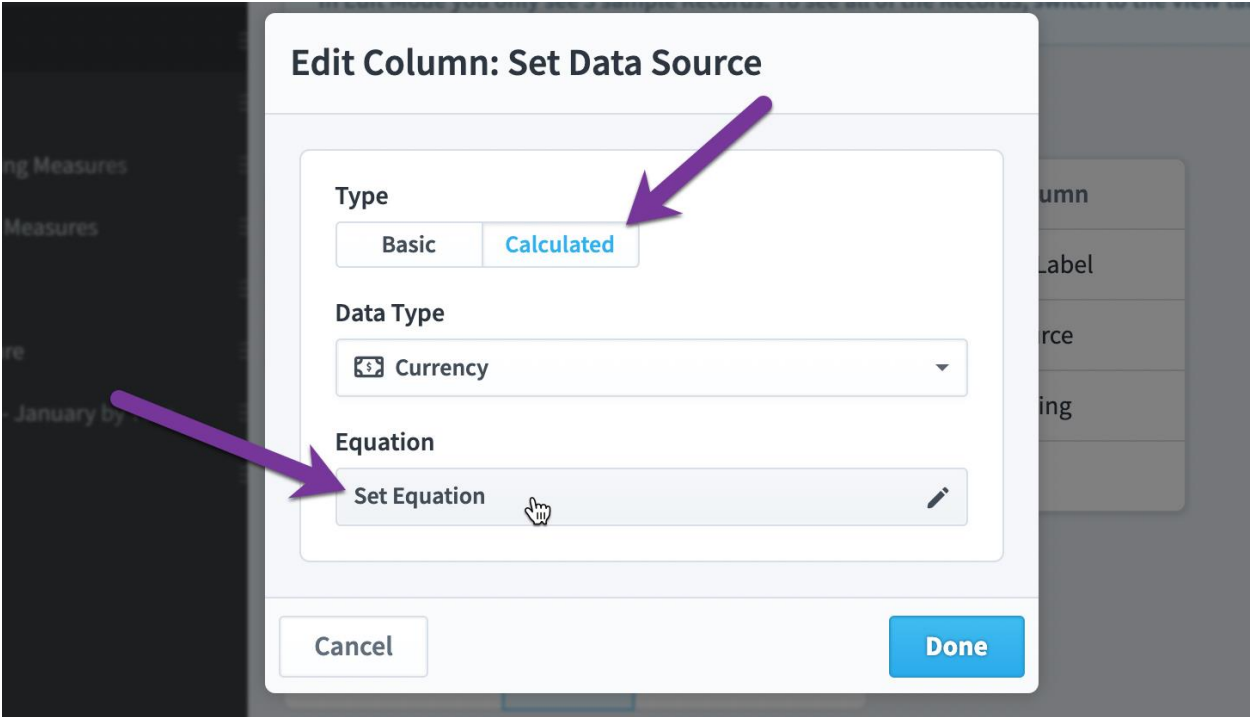
Every report column gets its data from somewhere, and to edit what data is showing, choose "Set Data Source" from the Edit Column menu.



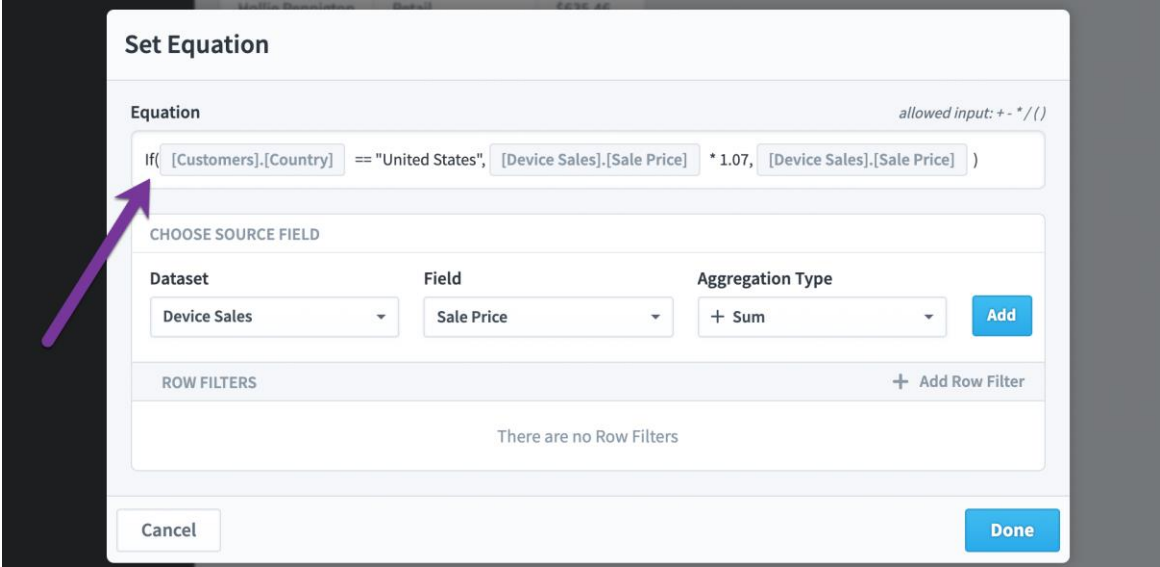
The default column type is Basic. This means the column is showing the value for a single field.



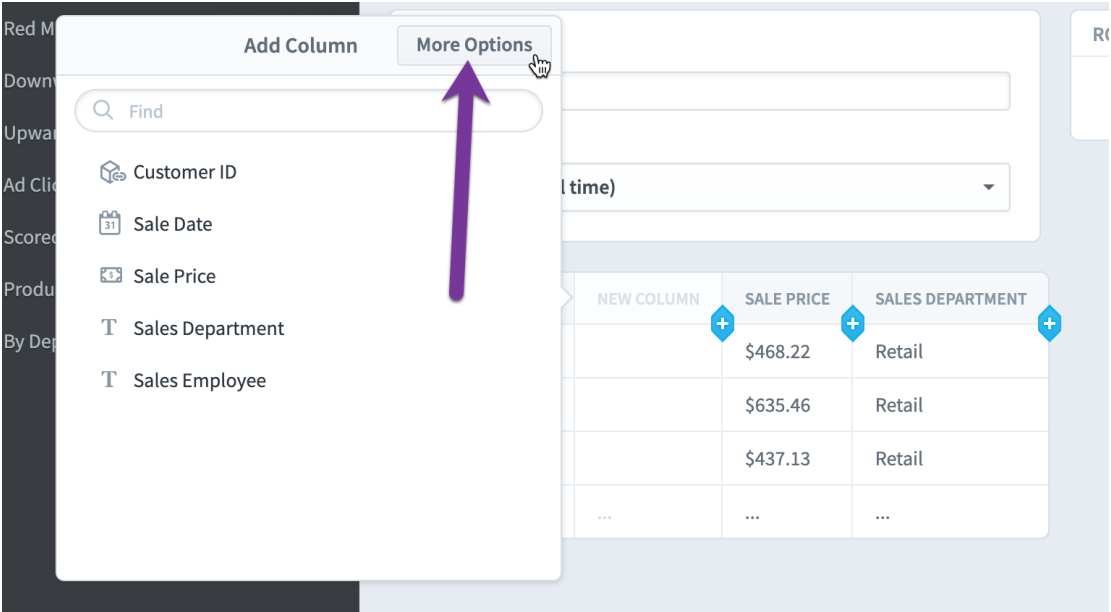
You can also choose to show a Calculated value in a column. Here we'll change the Type to Calculated and we'll click the "Set Equation" button.



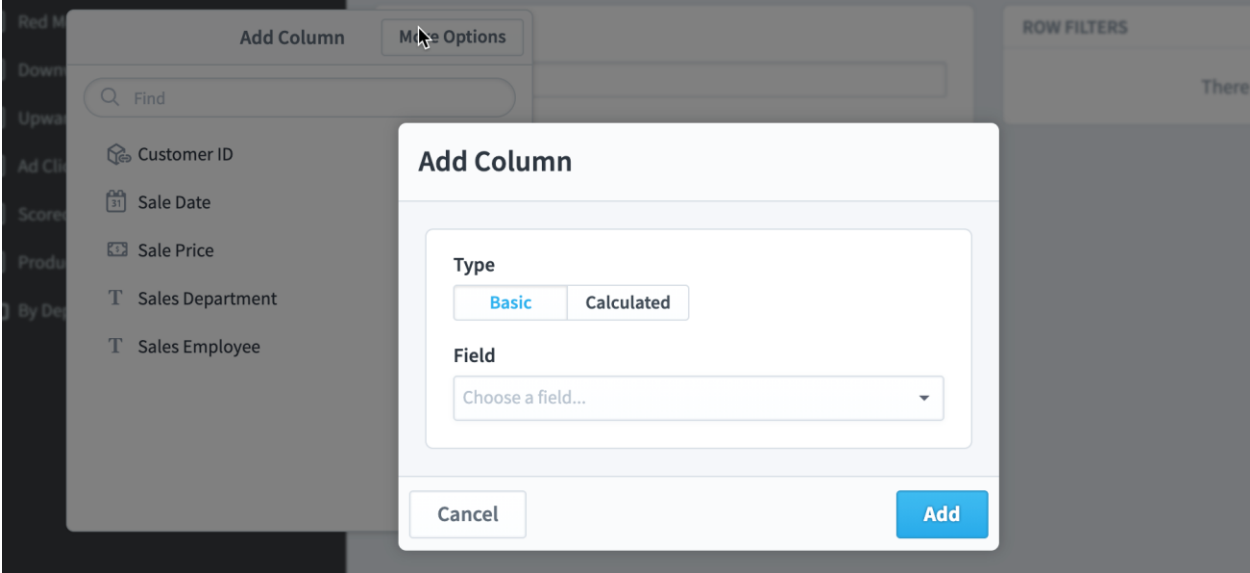
In this example we're building an equation that shows the value of the "Sales Price" field, but with an additional 7% sales tax added if the value of the Country field is "United States." For more information, see the Equations knowledge base article: <https://support.spiderstrategies.com/hc/en-us/articles/4407643362452>



Finally, it's important to note that you can reach this "Set Data Source" menu when adding a new column. Most of the time you'll want to choose a field from the list when adding a column. But, if you know your new column is going to be more complicated than that, you can just click the "More Options" button that's in the "Add Column" tooltip.

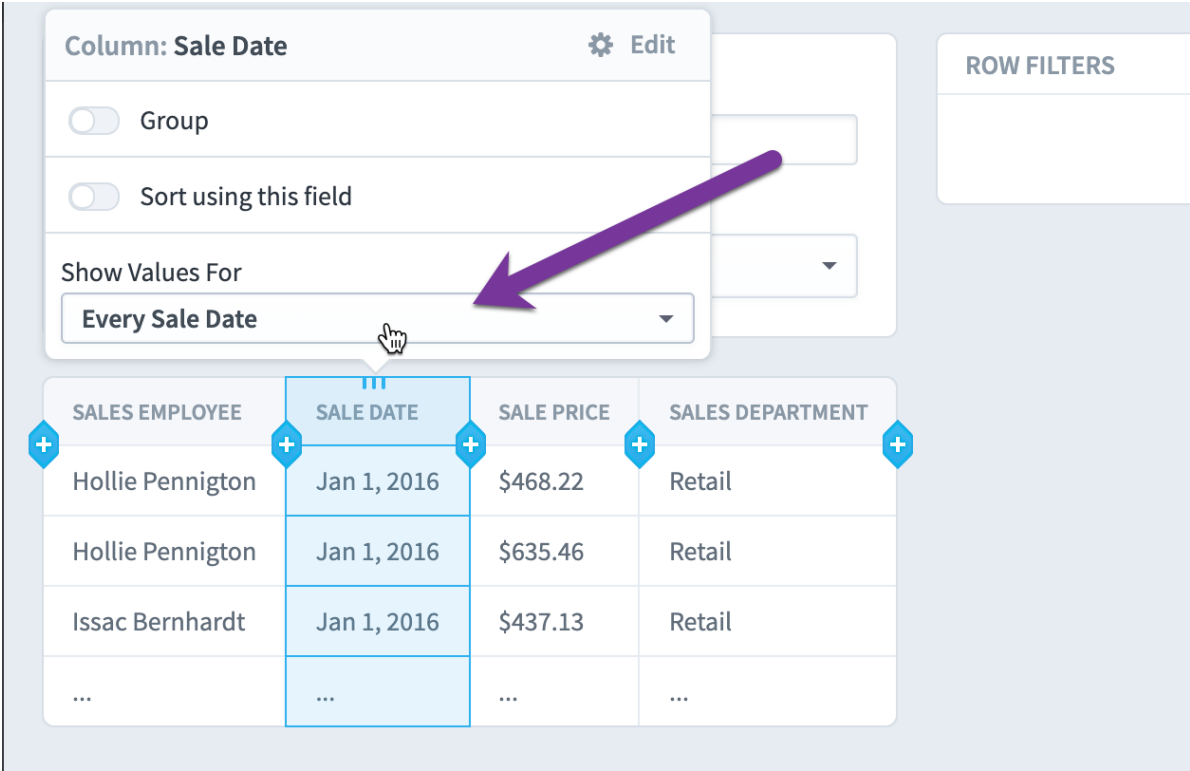


This shows the same "Set Data Source" menu, but this time it's for a column that hasn't been created yet.



Show values for

Sometimes when you click on a column, you'll have a "Show Values For" dropdown. In this example we've clicked on a date column that's showing data from the Sale Date field, and we're currently showing "Every Sale Date".



Here we've chosen to show values for the Quarterly calendar. The column now shows which quarter the sale happened in instead of the specific date.

The screenshot shows a configuration panel for a column named "Sale Date". The "Show Values For" dropdown is set to "Quarterly". Below the panel is a table with the following data:

SALES EMPLOYEE	SALE DATE	SALE PRICE	SALES DEPARTMENT
Edmond Zehrbach	Quarter 1, 2021	\$522.30	Retail
Issac Bernhardt	Quarter 1, 2021	\$621.02	Retail
Odell Sheler	Quarter 1, 2021	\$444.41	Retail
...

You'll see other options in the "Show Values For" dropdown depending on what data your column is showing. For example, our dataset has four ranges set up for the Sale Price field.

The "Add Ranges: Sale Price" dialog box displays the following ranges:

- Small Sale**: less than \$400
- Medium Sale**: \$400 or more, less than \$700
- Large Sale**: \$700 or more, less than \$2,000
- Very Large Sale**: \$2,000 or more

When we click on the column showing the Sale Price field, we can see that it defaults to "Every Sale Price".

The screenshot shows a configuration menu for the 'Sale Price' column. The menu includes options for 'Group', 'Sort using this field', and 'Show Values For'. The 'Show Values For' dropdown is open, showing 'Every Sale Price' as the selected option. Below the menu, a table displays sales data with columns for 'SALES EMPLOYEE', 'SALE MONTH', 'SALE PRICE', and 'SALES DEPARTMENT'. The 'SALE PRICE' column shows values like '\$621.02' and '\$344.41'. A purple arrow points from the 'Every Sale Price' option in the dropdown to the 'SALE PRICE' column in the table.

SALES EMPLOYEE	SALE MONTH	SALE PRICE	SALES DEPARTMENT
Edmond Zehrbach	January 2021	\$621.02	Retail
Issac Bernhardt	January 2021	\$344.41	Retail
...

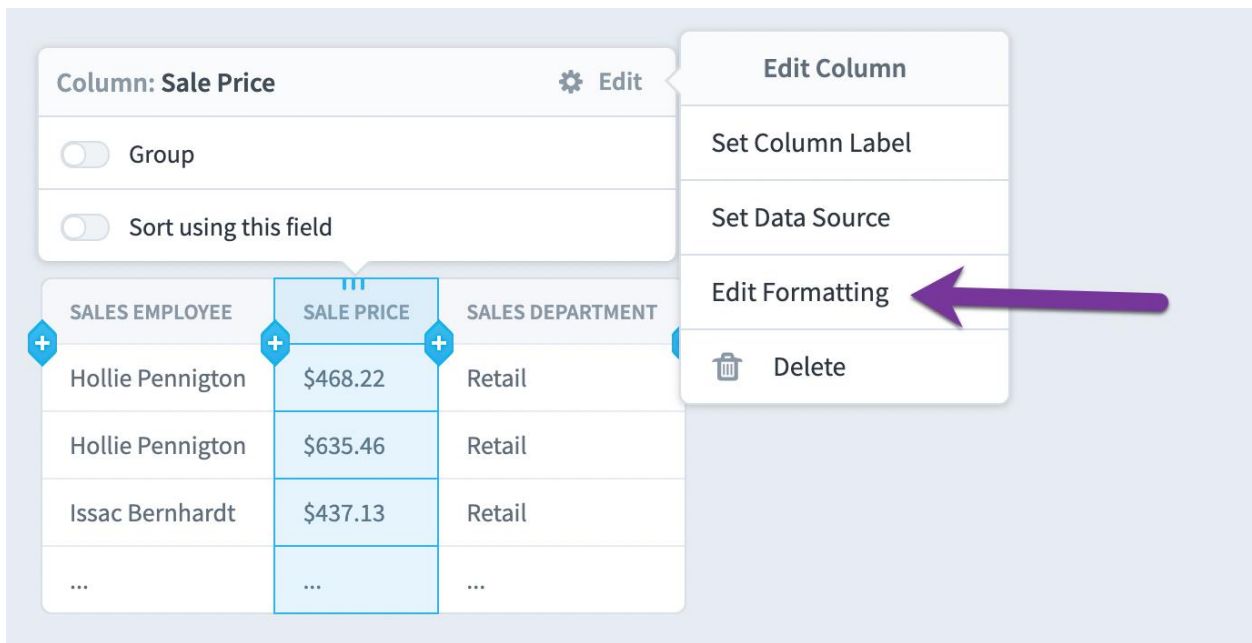
If we change "Show Values For" to "Every Sale Price Range", we'll see values that look like this.

The screenshot shows a table with columns for 'SALES EMPLOYEE', 'SALE MONTH', 'SALE PRICE', and 'SALES DEPARTMENT'. The 'SALE PRICE' column shows values like 'Medium Sale' and 'Small Sale'. A purple arrow points from the 'Retail' department column to the 'SALE PRICE' column.

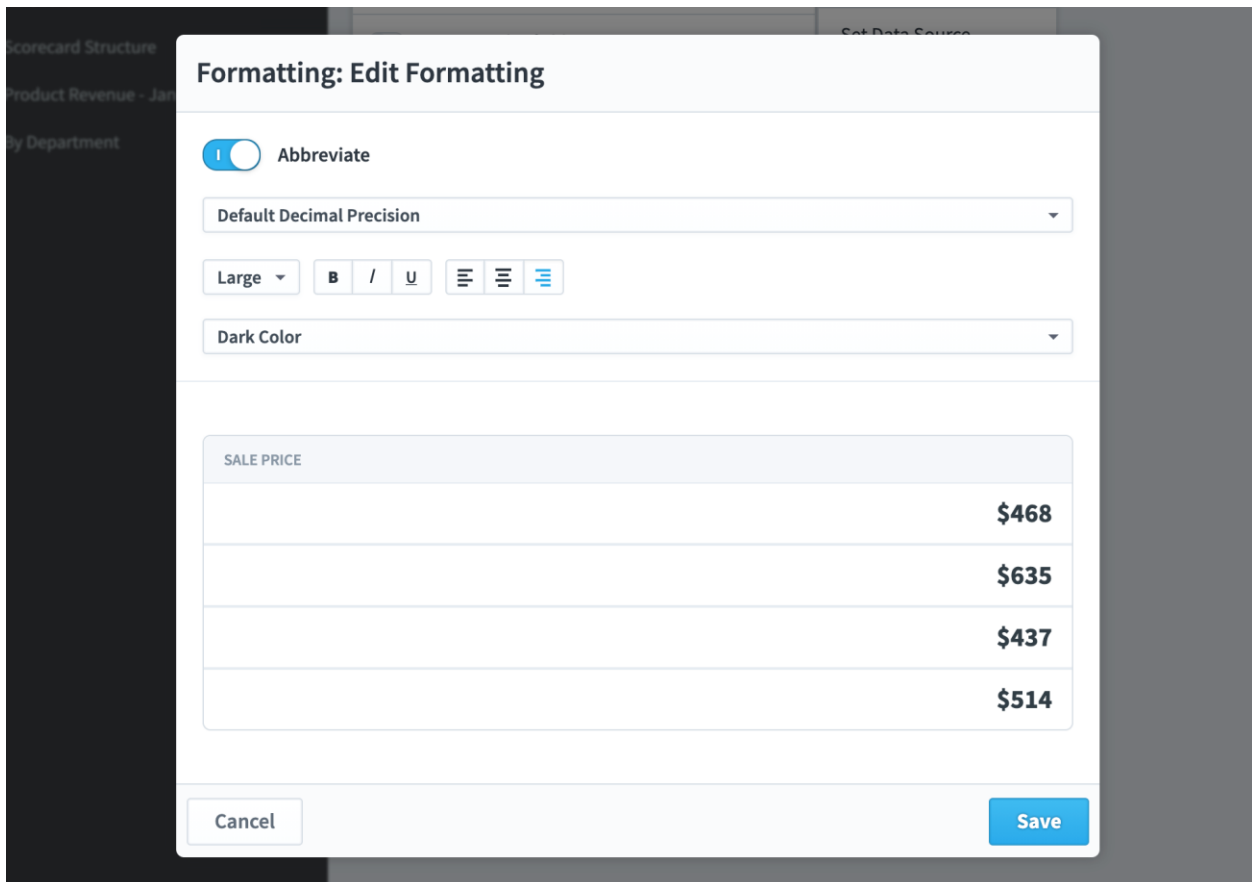
SALES EMPLOYEE	SALE MONTH	SALE PRICE	SALES DEPARTMENT
Edmond Zehrbach	January 2021	Medium Sale	Retail
Issac Bernhardt	January 2021	Medium Sale	Retail
Odell Sheler	January 2021	Small Sale	Retail
...

Column formatting

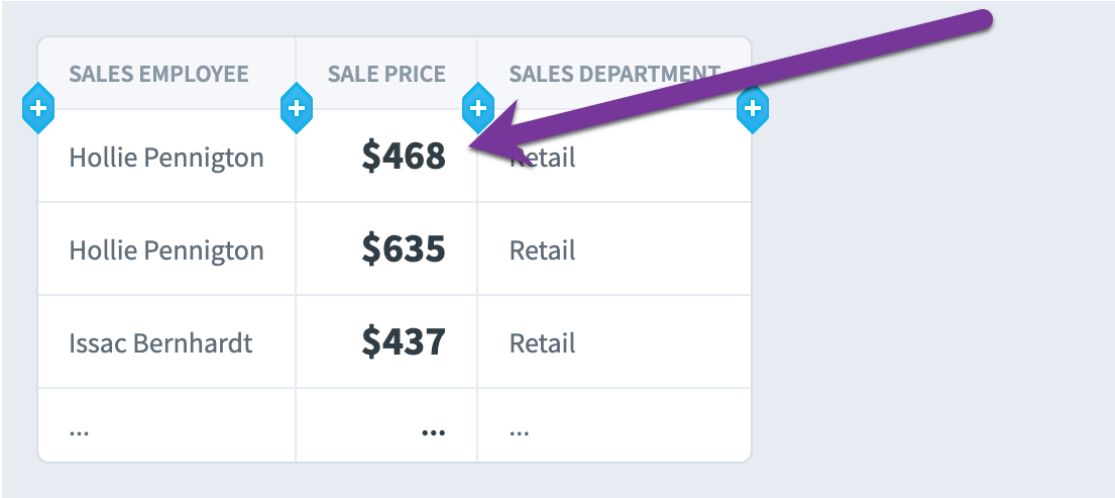
To edit a column's formatting, choose "Edit Formatting" from the Edit tooltip.



The Edit Formatting dialog gives you a preview of what your formatted data will look like. Here we've changed the font size to large, changed the color to dark, abbreviated the data, and aligned everything right.



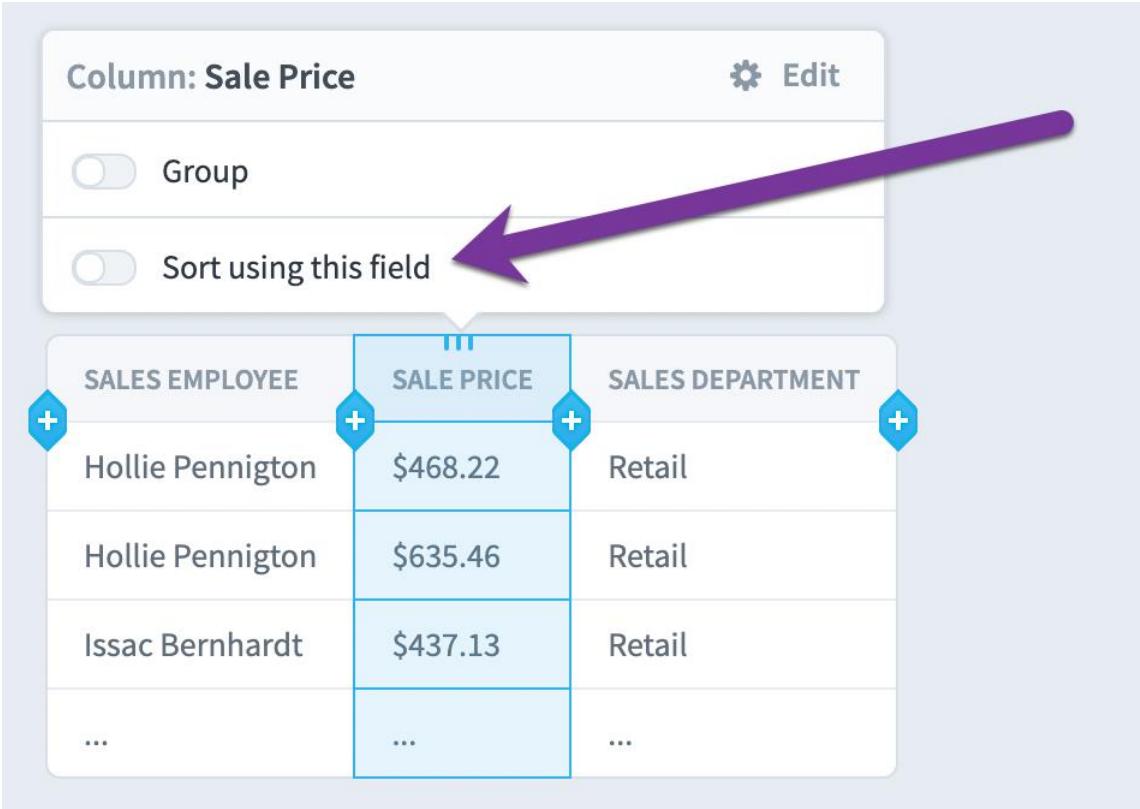
We end up with a report that looks like this.



SALES EMPLOYEE	SALE PRICE	SALES DEPARTMENT
Hollie Pennigton	\$468	Retail
Hollie Pennigton	\$635	Retail
Issac Bernhardt	\$437	Retail
...

Column sorting

You can choose to sort on any field in your report. The default sorting for scorecard and initiative reports is first by organization, and then by tree order. You can change this default sorting by clicking on a column and turning on "Sort using this field."



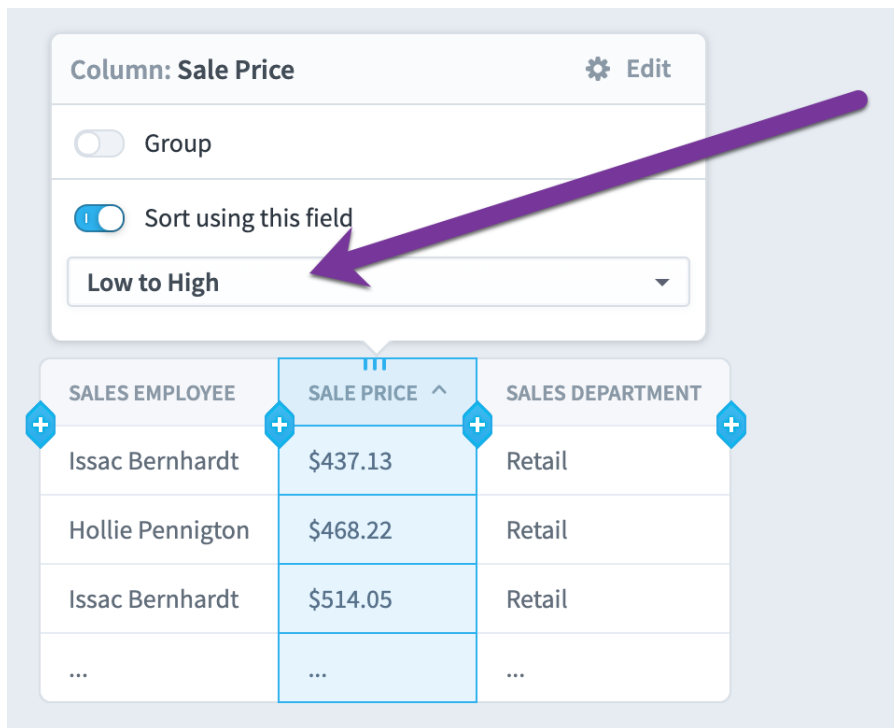
Column: Sale Price ⚙️ Edit

Group

Sort using this field

SALES EMPLOYEE	SALE PRICE	SALES DEPARTMENT
Hollie Pennigton	\$468.22	Retail
Hollie Pennigton	\$635.46	Retail
Issac Bernhardt	\$437.13	Retail
...

You can then choose to sort that column ascending or descending.

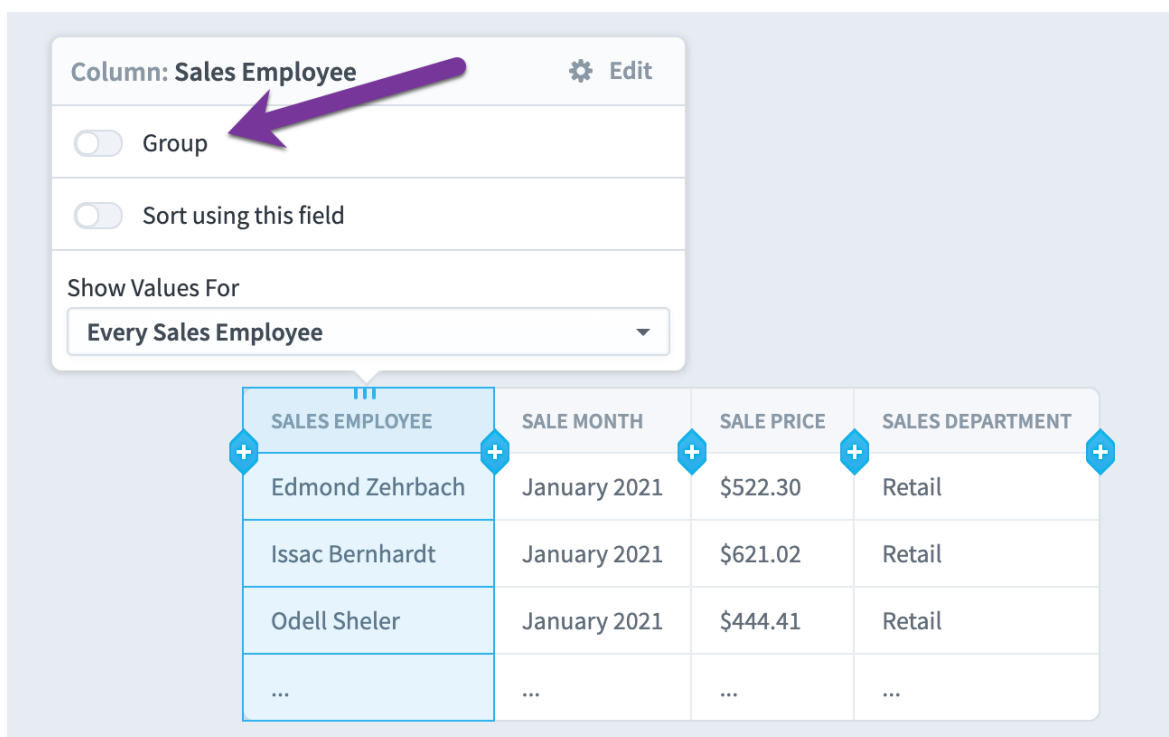


The screenshot shows a configuration panel for the 'Sale Price' column. The 'Group' toggle is off, and the 'Sort using this field' toggle is on. A dropdown menu is set to 'Low to High'. A purple arrow points from the dropdown to the table below.

SALES EMPLOYEE	SALE PRICE ^	SALES DEPARTMENT
Issac Bernhardt	\$437.13	Retail
Hollie Pennigton	\$468.22	Retail
Issac Bernhardt	\$514.05	Retail
...

Grouping

You can group by a column by clicking on the column and turning on the Group switch.



The screenshot shows a configuration panel for the 'Sales Employee' column. The 'Group' toggle is on, and the 'Sort using this field' toggle is off. The 'Show Values For' dropdown is set to 'Every Sales Employee'. A purple arrow points from the 'Group' toggle to the table below.

SALES EMPLOYEE	SALE MONTH	SALE PRICE	SALES DEPARTMENT
Edmond Zehrbach	January 2021	\$522.30	Retail
Issac Bernhardt	January 2021	\$621.02	Retail
Odell Sheler	January 2021	\$444.41	Retail
...

This shows all unique values for that column as large group headers, and then lists all of the records with that value underneath. In this example we've grouped by the Sales Employee column, so each group is a different sales employee. The Edit tab only shows the first three groups, but switching to the View tab will show the full report.

Sales Employee: Delphine Calmes		
SALE MONTH	SALE PRICE	SALES DEPARTMENT
July 2021	\$746.76	Retail
July 2021	\$390.12	Retail
July 2021	\$608.76	Retail
...
Sales Employee: Edmond Zehrbach		
SALE MONTH	SALE PRICE	SALES DEPARTMENT
July 2021	\$708.99	Retail
July 2021	\$566.96	Retail
July 2021	\$716.73	Retail
...
Sales Employee: Hollie Pennigton		
SALE MONTH	SALE PRICE	SALES DEPARTMENT
February 2020	\$725.93	Retail
February 2020	\$596.53	Retail
February 2020	\$648.47	Retail
...
...		
SALE MONTH	SALE PRICE	SALES DEPARTMENT
...

You can create another level of grouping by selecting another column and turning on "Group Again".

Column: Sales Department ⚙ Edit

Group Again ←

Sort using this field

Show Values For

Every Sales Department ▼

Sales Employee: Delphine Calmes		
SALE MONTH	SALE PRICE	SALES DEPARTMENT
July 2021	\$746.76	Retail
July 2021	\$390.12	Retail
July 2021	\$608.76	Retail
...

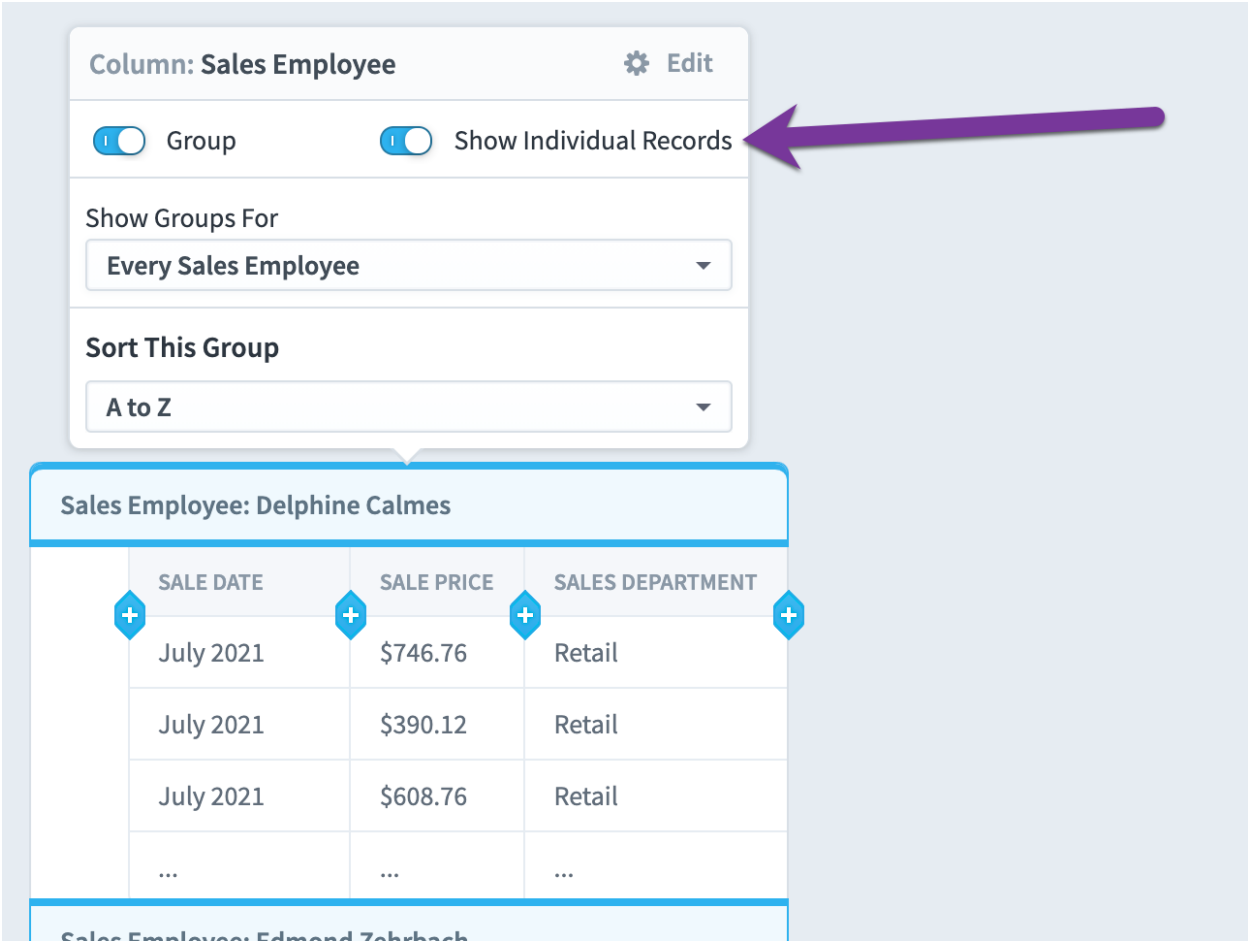
Sales Employee: Edmond Zehrbach		
SALE MONTH	SALE PRICE	SALES DEPARTMENT
July 2021	\$708.99	Retail
July 2021	\$566.96	Retail

In this example the Sales Employees are also grouped by Sales Department.

Sales Department: Corporate	
Sales Employee: Kym Lavender	
SALE MONTH	SALE PRICE
July 2020	\$16,308.81
July 2020	\$785.54
August 2020	\$6,497.68
...	...
Sales Employee: Russell Corrick	
SALE MONTH	SALE PRICE
August 2018	\$2,070.60
October 2018	\$31,485.14
August 2018	\$25,334.06
...	...
Sales Department: Retail	
Sales Employee: Delphine Calmes	
SALE MONTH	SALE PRICE
July 2021	\$608.76

Hiding individual records

Adding a group to your report opens the door to many new data presentation possibilities. The most powerful is the ability to turn off "Show Individual Records". In this example, we're grouping records by the Sales Employee column, and we're showing columns for the Sale Date, Sale Price, and Sales Department.



When you turn off "Show Individual Records", the report now only shows the groups. As you can see, the columns remain the same, but now they're showing aggregated data for each group. Number columns like Sale Price are summed by default. The default aggregation type of Date and Text columns is counting the number of unique values.

Column: Sales Employee Edit

Group Show Individual Records

Sort This Group

A to Z

SALES EMPLOYEE	# UNIQUE: SALE DATE	SALE PRICE SUM	# UNIQUE: SALES DEPARTMENT
Edmond Zehrbach	1,666	\$2,305,532.83	1
Delphine Calmes	1,687	\$2,598,137.46	1
Hollie Pennigton	1,795	\$3,076,958.48	1
...

Let's say we want to show the Average sale price for a group instead of the Sum of all sale prices. To do this, just choose Set Data Source like we did before.

Column: Sale Price Edit

Group Again

Sort Using This Field

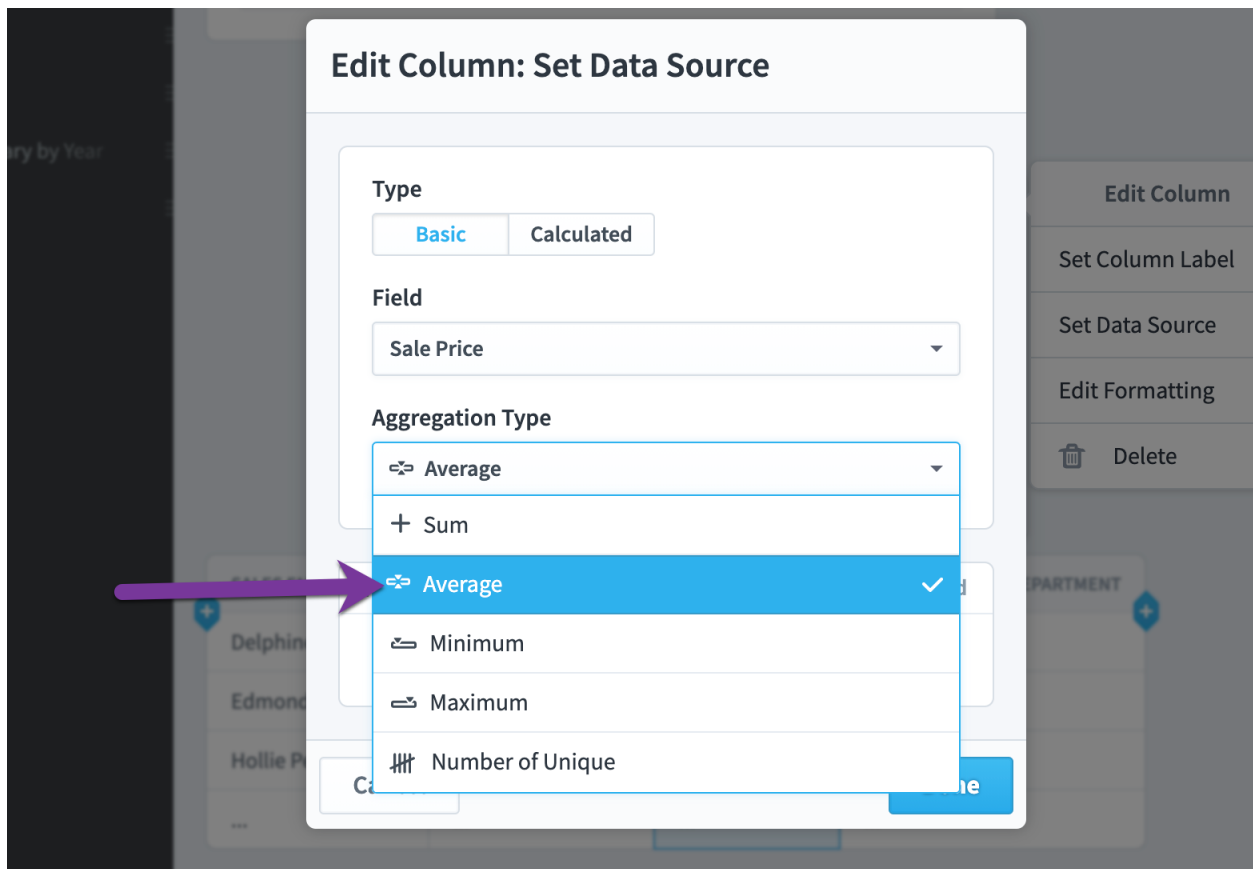
Repeat this column by...

Edit Column

- Set Column Label
- Set Data Source
- Edit Formatting
- Delete

SALES EMPLOYEE	# UNIQUE: SALE DATE	SALE PRICE SUM	# UNIQUE: SALES DEPARTMENT
Edmond Zehrbach	1,666	\$2,305,532.83	1
Delphine Calmes	1,687	\$2,598,137.46	1
Hollie Pennigton	1,795	\$3,076,958.48	1
...

Now that we're showing aggregated data, however, we have an Aggregation Type choice in this dialog. We'll choose Average.



Once we click Done, we have a report showing the average sale price for each employee.

SALES EMPLOYEE	# UNIQUE: SALE DATE	AVERAGE SALE PRICE	# UNIQUE: SALES DEPARTMENT
Edmond Zehrbach	1,666	\$614.81	1
Delphine Calmes	1,687	\$614.51	1
Hollie Pennigton	1,795	\$622.49	1
...

Finally, we'll change the Sale Date aggregation type to "Latest Date". Our finished report looks like this on the Edit Tab.

SALES EMPLOYEE	# UNIQUE: SALE DATE	AVERAGE SALE PRICE	# UNIQUE: SALES DEPARTMENT
Edmond Zehrbach	1,666	\$614.81	1
Delphine Calmes	1,687	\$614.51	1
Hollie Pennigton	1,795	\$622.49	1
...

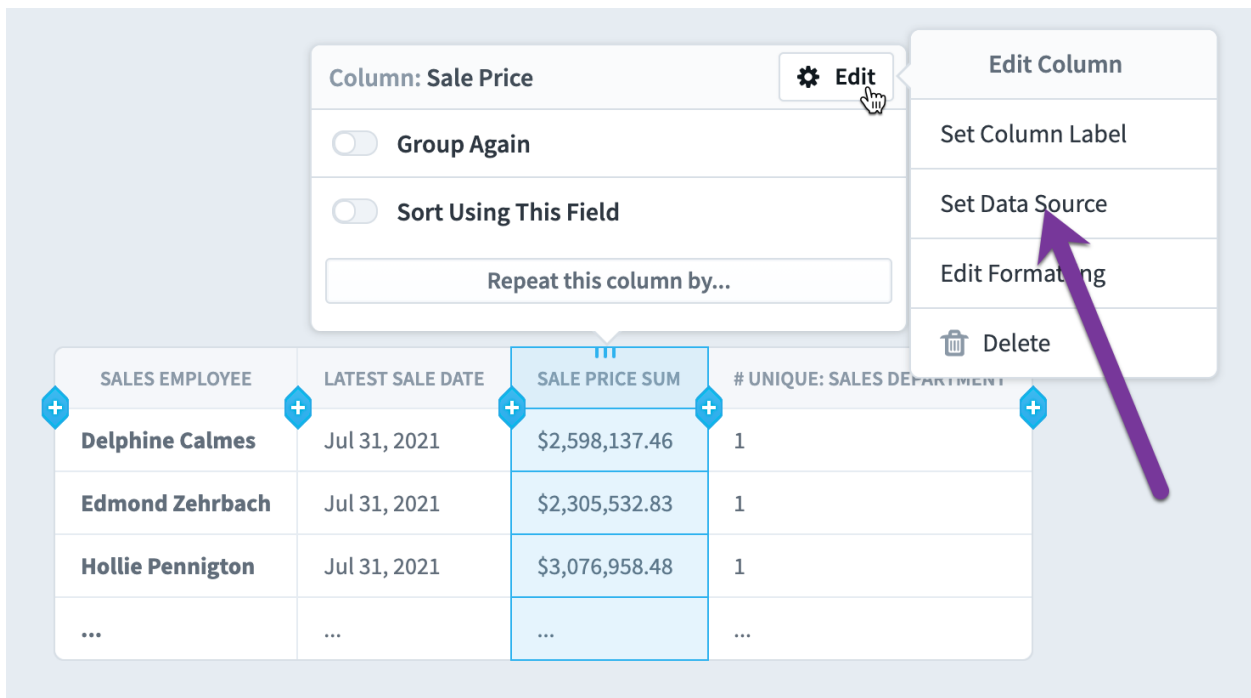
And like this on the View tab.

View

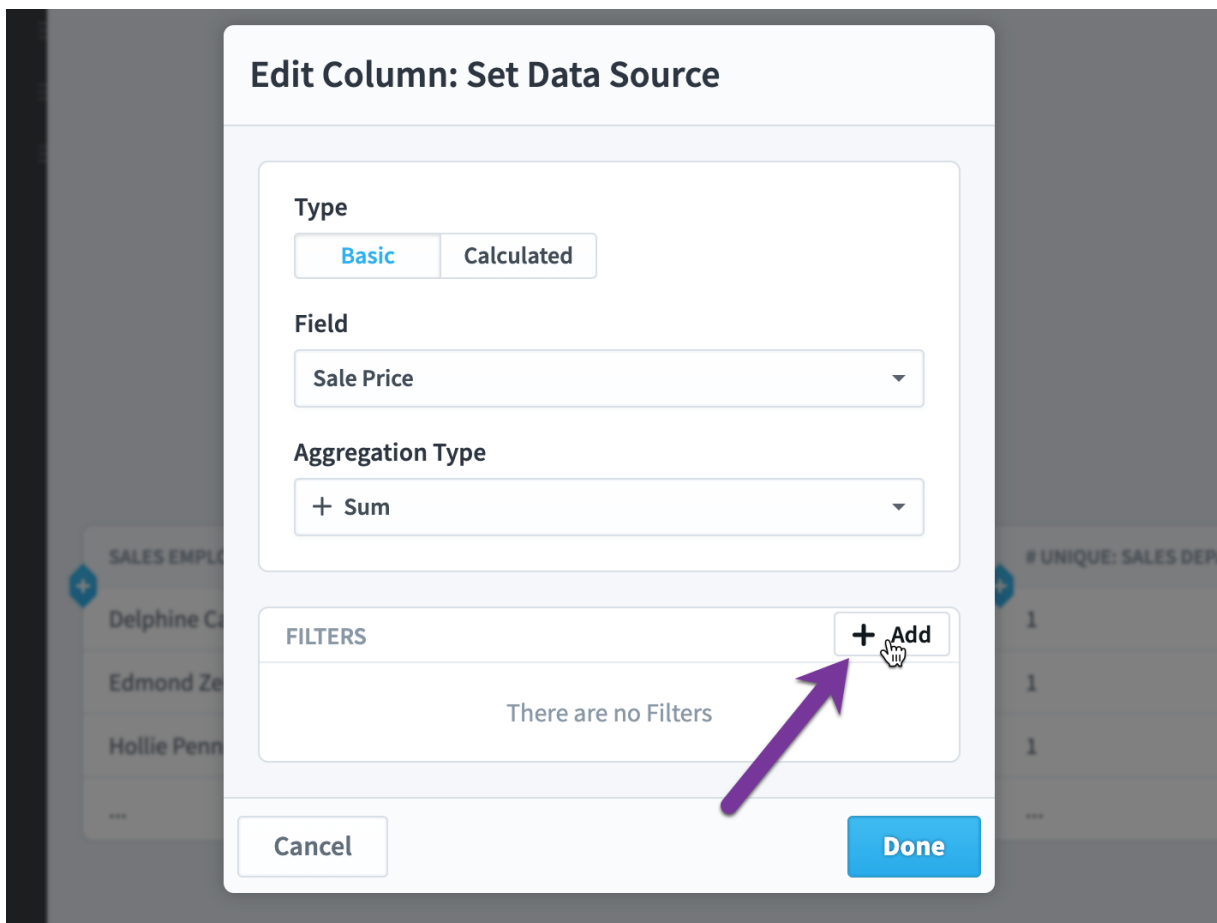
SALES EMPLOYEE	LATEST SALE DATE	AVERAGE SALE PRICE	# UNIQUE: SALES DEPARTMENT
Delphine Calmes	Jul 31, 2021	\$614.51	1
Edmond Zehrbach	Jul 31, 2021	\$614.81	1
Hollie Pennigton	Jul 31, 2021	\$622.49	1
Issac Bernhardt	Jul 31, 2021	\$616.34	1
Kym Lavender	Jul 28, 2021	\$17,721.23	1
Micheline Turkasz	Jul 31, 2021	\$617.45	1
Odell Sheler	Jul 31, 2021	\$617.82	1
Russell Corrick	Jul 29, 2021	\$17,977.49	1

Column filters when hiding individual records

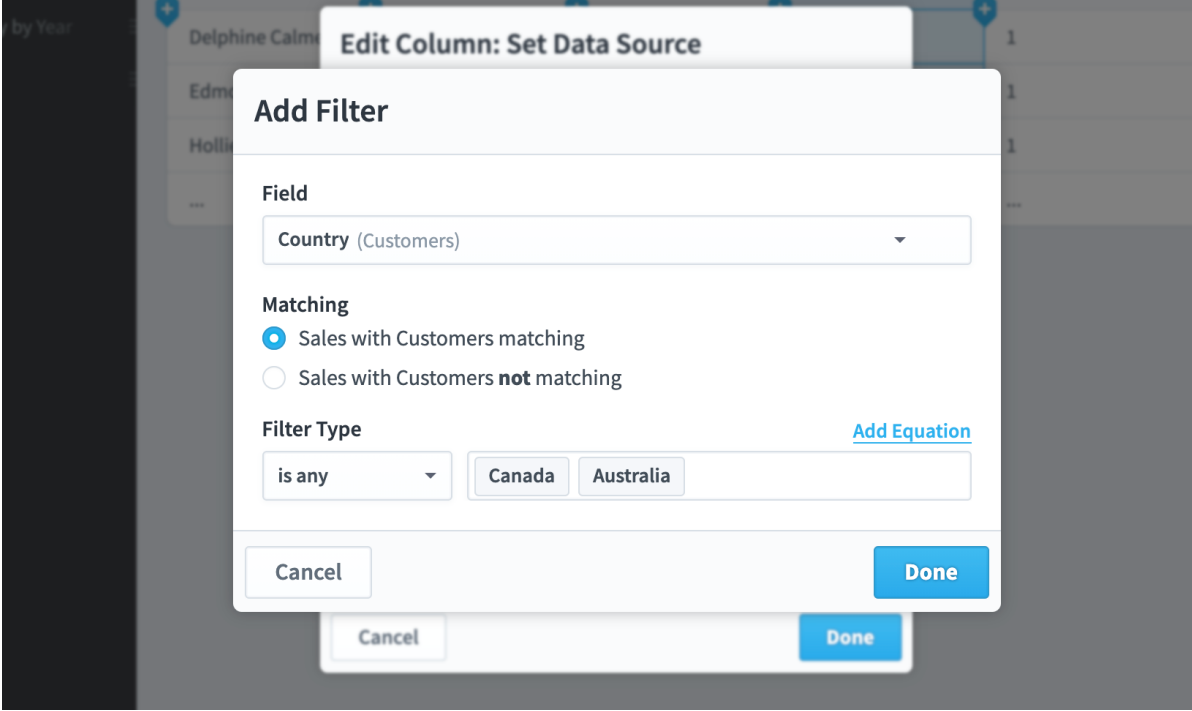
Once you're hiding individual records and your report is showing aggregated data, you can start adding filters to your columns. In this example we're going to choose "Set Data Source" for a Sale Price column.



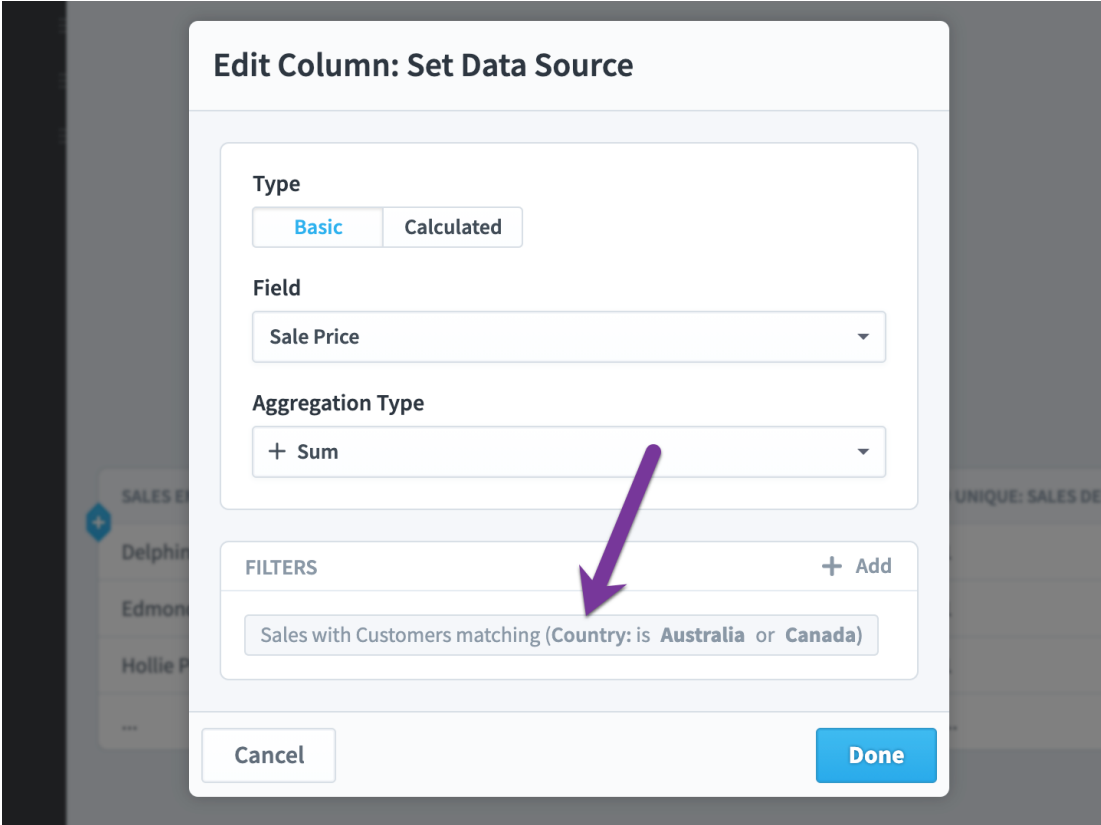
We'll leave the aggregation type as sum and click the "Add" button in the filters panel.



Next, we'll create a filter to only include data from records where the sales country is Canada or Australia.



This is what our new column filter looks like.



When we click Done, we now have a column showing the sum of all sales in Australia and Canada for each employee.

SALES EMPLOYEE	LATEST SALE DATE	AUSTRALIA & CANADA	# UNIQUE: SALES DEPARTMENT
Delphine Calmes	Jul 31, 2021	\$645,452.38	1
Edmond Zehrbach	Jul 31, 2021	\$558,641.06	1
Hollie Pennigton	Jul 31, 2021	\$750,574.47	1
...

Repeating columns for scorecards

You can create repeating columns for Scorecards, Initiatives, and Datasets reports, but they're a little bit different for every report type. For Scorecards, values that change over time are always inside of a repeating column. Whenever you add a column like KPI Value or Goal, you'll automatically see that field repeating by calendar period. As you can see in this example, it doesn't make sense to show a KPI value without knowing what period that KPI value is for.

NAME	ORGANIZATION	MAY 2021	JUNE 2021	JULY 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Sales Revenue	Sales	\$5,117,300	\$5,240,300	\$4,821,600
New Customers	Sales	32	33	34
Number of Renewals	Sales	40	39	37
...

To edit repeating columns, just click on them. Just like when you select a column, selecting a repeating column header shows a tooltip. We'll click the Edit button.

Repeating columns: Monthly

NAME	ORGANIZATION	JUNE 2021	JULY 2021	AUGUST 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue	Mobileworld Inc. Example	\$698K	\$702K	\$711K
SEO Project Spend to Date	Mobileworld Inc. Example	232K	232K	232K
Test KPI	Mobileworld Inc. Example		6	6
...

This opens the Edit Repeating Columns dialog. We'll change the calendar to Quarterly, and we'll choose a range of 4 periods.

Edit Repeating Columns

CHOOSE A CALENDAR PERIOD

CALENDAR: Quarterly

TYPE: Relative (selected) | By Date

SHOW: 3 Periods Earlier TO Current Period

Buttons: Cancel, Done

When we click Done, we now see the KPI value being repeated for four quarters.

NAME	ORGANIZATION	QUARTER 4, 2020	QUARTER 1, 2021	QUARTER 2, 2021	QUARTER 3, 2021
		KPI VALUE	KPI VALUE	KPI VALUE	KPI VALUE
Sales Revenue	Sales	\$13,839,900	\$14,591,600	\$15,230,600	\$13,483,100
New Customers	Sales	115	114	96	92
Number of Renewals	Sales	121	127	120	109
...

Repeating columns for initiatives

As we mentioned above, repeating columns work a little differently for every report type. Repeating columns for Initiatives are similar to repeating columns for Scorecards because there are values like Money Spent that change over time. Initiatives are different, however, because their repeating columns aren't required and aren't added by default. Whenever you have a column for a field that changes over time and it's not repeating, the report will just show the latest value.

In this example we have a column showing the projected budget variance for every initiative item. The projected budget variance field does change over time, but because this column isn't inside of a repeating column header, the report just shows the most up-to-date values for the projected budget variance. We do, however, see a "Repeat this column by calendar period" button.

Column: Projected Budget Variance ⚙ Edit

Group

Sort Using This Field

Repeat this column by calendar period

NAME	ASSIGNED USERS AND GROUPS	PROJECTED BUDGET VARIANCE	PROJECTED SCHEDULE VARIANCE
Migrate Servers to Cloud	Full User	\$2,500 under budget	21 days late
Build a SEO Capability	Full User	\$46K under budget	14 days early
Implement New Accounting System		\$15K over budget	61 days late
...

When we click the button, we now have repeating columns showing how the projected budget variance has changed over time.

NAME	ASSIGNED USERS AND GROUPS	JUNE 2021	JULY 2021	AUGUST 2021	PROJECTED SCHEDULE VARIANCE
		PROJECTED BUDGET VARIANCE	PROJECTED BUDGET VARIANCE	PROJECTED BUDGET VARIANCE	
Migrate Servers to Cloud	Full User	\$14.5K under budget	\$2,500 under budget	\$2,500 under budget	21 days late
Build a SEO Capability	Full User	\$46K under budget	\$46K under budget	\$46K under budget	14 days early
Implement New Accounting System		\$15K over budget	\$15K over budget	\$15K over budget	61 days late

Repeating columns for datasets

You can only add repeating columns to dataset reports when individual records are turned off. That’s because we need to first aggregate dataset records for each group before we can disaggregate the data into repeating columns. Scorecard and Initiative reports don’t have this restriction because their repeating columns can show values that change over time.

In this example we’re grouping by Sales Employee and are hiding individual records. We now see a “Repeat this column by…” button when you click on any column other than the one you’re grouping by.

The screenshot shows a configuration menu for the 'Sale Price' column. The menu includes options for 'Group Again' and 'Sort using this field', both of which are currently disabled. Below these is a 'Show Values For' dropdown menu set to 'Every Sale Price'. At the bottom of the menu is a button labeled 'Repeat this column by...'. A purple arrow points to this button. Below the menu, a table is visible with columns: SALES EMPLOYEE, # UNIQUE: SALE DATE, SALE PRICE SUM, and # UNIQUE: SALES DEPARTMENT. The table contains three rows of data for employees: Delphine Calmes, Edmond Zehrbach, and Hollie Pennigton.

SALES EMPLOYEE	# UNIQUE: SALE DATE	SALE PRICE SUM	# UNIQUE: SALES DEPARTMENT
Delphine Calmes	1,687	\$2,598,137.46	1
Edmond Zehrbach	1,666	\$2,305,532.83	1
Hollie Pennigton	1,795	\$3,076,958.48	1
...

We'll click the "Repeat this column by..." button and then choose to repeat by Country.

The screenshot shows a data table with columns: SALES EMPLOYEE, # UNIQUE: SALE DATE, SALE PRICE SUM, and # UNIQUE: SALES DEPARTMENT. A dialog box titled 'Column: Sale Price' is open, showing options for 'Group Again', 'Sort using this field', and 'Show Values For' set to 'Every Sale Price'. A 'Repeat this column by...' button is highlighted. A 'Repeat By' dialog is also open, listing options: Customer ID, Sale Date, Sale Price, Sales Department, Country (Customers), and Customer Name (Customers). The 'Country (Customers)' option is selected and highlighted with a purple arrow, and a 'Repeat' button is visible next to it.

We now have a separate Sale Price column for every country.

SALES EMPLOYEE	# UNIQUE: SALE DATE	CANADA	AUSTRALIA	UNITED STATES	UNITED KINGDOM	# UNIQUE: SALES DEPARTMENT
Delphine Calmes	1,687	\$308,250.63	\$337,201.75	\$1,365,454.05	\$587,231.03	1
Edmond Zehrbach	1,666	\$267,421.59	\$291,219.47	\$1,224,105.67	\$522,786.10	1
Hollie Pennigton	1,795	\$360,376.61	\$390,197.86	\$1,607,217.55	\$719,166.46	1
...

Multiple blocks of repeating columns

You're not limited to one range of repeating columns. In this example we're going to add a new column outside of the first block of repeating columns.

NAME	OWNERS	JUNE 2021	JULY 2021	AUGUST 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue		\$697,974	\$701,874	\$712,124
SEO Project Spend to Date		231,500	231,500	231,500
Test KPI			6	
...

We'll choose to add another KPI Value column, and now we have two identical blocks of repeating columns.

NAME	JUNE 2021			JULY 2021			AUGUST 2021			OWNERS
	KPI VALUE	KPI VALUE	KPI VALUE	KPI VALUE	KPI VALUE	KPI VALUE	KPI VALUE	KPI VALUE		
Total Revenue	\$697,974	\$701,874	\$712,124	\$697,974	\$701,874	\$712,124	\$697,974	\$701,874	\$712,124	
SEO Project Spend to Date	231,500	231,500	231,500	231,500	231,500	231,500	231,500	231,500	231,500	
Test KPI		6			6			6		
...

Finally, we'll edit each repeating column block to contain a single period, and we'll drag and drop the blocks next to each other. Now we have a report showing the KPI value for the current month and the KPI value from the month one year ago.

NAME	OWNERS	AUGUST 2020	AUGUST 2021
		KPI VALUE	KPI VALUE
Total Revenue		\$963,303	\$712,124
SEO Project Spend to Date		131,500	231,500
Test KPI			
...

Repeating columns again

Scorecard, Initiative, and Dataset reports can all repeat columns a second time when individual records are turned off. For Scorecard and Initiative reports, repeating again is almost always used when multiple organizations have the same initiative or scorecard items and you want to compare them across organizations. For datasets, repeating again is common with all field types.

To repeat again, click on the repeating column header to select it.

SALES EMPLOYEE	# UNIQUE: SALE DATE	AUSTRALIA	UNITED STATES	CANADA	UNITED KINGDOM	# UNIQUE: SALES DEPARTMENT
Delphine Calmes	1,687	\$337,201.75	\$1,365,454.05	\$308,250.63	\$97,231.03	1
Edmond Zehrbach	1,666	\$291,219.47	\$1,224,105.67	\$267,421.59	\$522,761.10	1
Hollie Pennigton	1,795	\$390,197.86	\$1,607,217.55	\$360,376.61	\$719,166.46	1
...

Then click "Repeat again by" and choose a field. Here we'll repeat by Sales Department.

Repeating columns by: Country

Repeat again by

Show Values For: Every Country

Repeat again by More Options

- Customer ID
- Sale Price
- T Sales Department** Repeat
- T Country (Customers)
- T Customer Name (Customers)

The result is a report with two levels of repeating columns, first by Sales Department and then by Country.

SALES EMPLOYEE	# UNIQUE: SALE DATE	RETAIL				CORPORATE				# UNIQUE: SALES DEPARTMENT
		UNITED KINGDOM	AUSTRALIA	CANADA	UNITED STATES	UNITED KINGDOM	AUSTRALIA	CANADA	UNITED STATES	
		SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	
Delphine Calmes	1,687	\$587,231.03	\$337,201.75	\$308,250.63	\$1,365,454.05	\$0	\$0	\$0	\$0	1
Edmond Zehrbach	1,666	\$522,786.10	\$291,219.47	\$267,421.59	\$1,224,105.67	\$0	\$0	\$0	\$0	1
Hollie Pennigton	1,795	\$719,166.46	\$390,197.86	\$360,376.61	\$1,607,217.55	\$0	\$0	\$0	\$0	1
...

On the Edit tab there are all 0s for Corporate sales, but when you go to the View tab you can see that in this example employees either sell retail or corporate, never both.

View											Edit
SALES EMPLOYEE	# UNIQUE: SALE DATE	RETAIL				CORPORATE				# UNIQUE: SALES DEPARTMENT	
		UNITED KINGDOM	AUSTRALIA	CANADA	UNITED STATES	UNITED KINGDOM	AUSTRALIA	CANADA	UNITED STATES		
		SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM		
Delphine Calmes	1,687	\$587,231.03	\$337,201.75	\$308,250.63	\$1,365,454.05	\$0	\$0	\$0	\$0	1	
Edmond Zehrbach	1,666	\$522,786.10	\$291,219.47	\$267,421.59	\$1,224,105.67	\$0	\$0	\$0	\$0	1	
Hollie Pennigton	1,795	\$719,166.46	\$390,197.86	\$360,376.61	\$1,607,217.55	\$0	\$0	\$0	\$0	1	
Issac Bernhardt	1,859	\$819,492.07	\$419,403.16	\$425,678.93	\$1,859,041.49	\$0	\$0	\$0	\$0	1	
Kym Lavender	314	\$0	\$0	\$0	\$0	\$1,306,166.74	\$603,707.45	\$916,574.81	\$3,340,537.35	1	
Micheline Turkasz	1,755	\$665,379.83	\$365,327.40	\$373,668.11	\$1,505,650.29	\$0	\$0	\$0	\$0	1	
Odell Sheler	1,777	\$716,828.74	\$398,856.70	\$397,922.11	\$1,639,753.17	\$0	\$0	\$0	\$0	1	
Russell Corrick	269	\$0	\$0	\$0	\$0	\$1,081,364.71	\$585,248.26	\$579,356.99	\$2,823,682.38	1	

Changing header order

In this example we're showing KPI Value and Goal columns, repeating for 3 periods. The columns are on the bottom and the calendar periods are on top.

NAME	ORGANIZATION	OWNERS	APRIL 2021		MAY 2021		JUNE 2021	
			KPI VALUE	GOAL	KPI VALUE	GOAL	KPI VALUE	GOAL
			Total Revenue	Mobileworld Inc. Example		\$693,274	\$765,000	\$697,574
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	5,000	231,500	5,000	231,500	5,000
Product Revenue	Financial	Full User	\$441,024	\$465,000	\$443,424	\$465,000	\$441,624	\$465,000
...

To put the columns on top, just drag and drop them vertically.

NAME	ORGANIZATION	OWNERS	KPI VALUE	GOAL	KPI VALUE	GOAL	KPI VALUE	GOAL	21
Total Revenue	Mobileworld Inc. Example		\$693,274	\$765,000	\$697,574	\$765,000	\$697,974	\$765,000	
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	5,000	231,500	5,000	231,500	5,000	
Product Revenue	Financial	Full User	\$441,024	\$465,000	\$443,424	\$465,000	\$441,624	\$465,000	
...

Now the report first groups by column, showing the three periods for KPI Value and then the three periods for Goal.

NAME	ORGANIZATION	OWNERS	KPI VALUE			GOAL		
			APRIL 2021	MAY 2021	JUNE 2021	APRIL 2021	MAY 2021	JUNE 2021
Total Revenue	Mobileworld Inc. Example		\$693,274	\$697,574	\$697,974	\$765,000	\$765,000	\$765,000
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	231,500	231,500	5,000	5,000	5,000
Product Revenue	Financial	Full User	\$441,024	\$443,424	\$441,624	\$465,000	\$465,000	\$465,000
...

Hiding repeating column headers

Some reports have only one column, for example KPI Value. Other reports have only one repeating value, for example a single calendar period. In these situations, you can choose to hide either the column or the repeating value header.

For example, here we’re showing the KPI Value for three months. The KPI Value isn’t adding a lot to the report in this situation, so we’ve dragged the column header to the top.

NAME	ORGANIZATION	OWNERS	KPI VALUE		
			APRIL 2021	MAY 2021	JUNE 2021
Total Revenue	Mobileworld Inc. Example		\$693,274	\$697,574	\$697,974
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	231,500	231,500
Product Revenue	Financial	Full User	\$441,024	\$443,424	\$441,624
...

We then select the column and turn on "Hide This Header". On the Edit table the header now has an icon showing that it's hidden.

Column: KPI Value ⚙ Edit

Sort using this field

Hide This Header

NAME	ORGANIZATION	OWNERS	KPI VALUE		
			APRIL 2021	MAY 2021	JUNE 2021
Total Revenue	Mobileworld Inc. Example		\$693,274	\$697,574	\$697,974
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	231,500	231,500
Product Revenue	Financial	Full User	\$441,024	\$443,424	\$441,624
...

On the View tab the column header is no longer visible.

View
Edit
June 2021
<
>

NAME	ORGANIZATION	OWNERS	APRIL 2021	MAY 2021	JUNE 2021
Total Revenue	Mobileworld Inc. Example		\$693,274	\$697,574	\$697,974
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	231,500	231,500
Product Revenue	Financial	Full User	\$441,024	\$443,424	\$441,624
Training Revenue	Financial	Full User	\$228,650	\$229,900	\$231,050
Book Revenue	Financial	Full User	\$23,600	\$24,250	\$25,300
Product Costs	Financial		\$275,841	\$275,799	\$275,832

When you're repeating again, you can even hide two levels of headers. In this example we're showing data for a single field and for a single calendar period. We've chosen to hide all of the headers except the KPI name.

	KPI VALUE						
ORGANIZATION	AUGUST 2021						
	SALES REVENUE	PRODUCT SALES REVENUE	TRAINING SALES REVENUE	BOOK SALES REVENUE	NEW CUSTOMERS	NUMBER OF RENEWALS	CLOSE RATIO
(sales template)	663K	402K	225K	35.7K	5	8	0.33
Africa	318K	128K	167K	23.2K	3	7	0.39
Australasia	505K	244K	243K	18.1K	4	2	0.23
...

Notes columns

When you add a notes column to your report, there's a "Set Note Display" option in the menu.

NAME	NOTES	JUNE 2021	JULY 2021	AUGUST 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue	<i>Applies to All Time by Spider Impact Administrator on May 15, 2018:</i> I'm excited about how we're tracking revenue. For the first time, we have ERP systems talking with our data visualization tools. Great work team!	\$698K	\$702K	\$712K
SEO Project Spend to Date		232K	232K	232K
Test KPI			6	6
...

This allows you to choose not only the type of notes to show for your report, but also the information from each note you want to see.

Set Notes Display

NOTES TO SHOW

NOTE TYPE: All Period Specific Only General Only

CALENDAR: Current Calendar

SHOW: 2 Periods Earlier TO Current Period

NOTE DETAILS

- Created Date
- Author
- Calendar Period
- Scorecard Item
- Replies
- Notes from Descendants

Cancel Done

Weight columns

A scorecard item's weight can change over time, but it often doesn't. If you add a Weight column to your report, it will show the most recent weight for that item.

NAME	WEIGHT	JUNE 2021	JULY 2021	AUGUST 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue	25%	\$698K	\$702K	\$712K
SEO Project Spend to Date	75%	232K	232K	232K
Test KPI	20%		6	6
...

If you add a Weight column inside of repeating calendar periods, it will show what the weight was at the end of the period. In the example, the "SEO Project Spend" KPI weight changes in August.

NAME	JUNE 2021		JULY 2021		AUGUST 2021	
	KPI VALUE	WEIGHT	KPI VALUE	WEIGHT	KPI VALUE	WEIGHT
Total Revenue	\$698K	25%	\$702K	25%	\$712K	25%
SEO Project Spend to Date	232K	50%	232K	50%	232K	75%
Test KPI			6	20%	6	20%
...

"Scorecard items in multiple organizations" filter

There's a new report filter called "Scorecard Items in Multiple Organizations".

Report Writer: Add Row Filter

Choose something that you want to filter on. This will limit your report to only showing rows for scorecard items that match your filter.

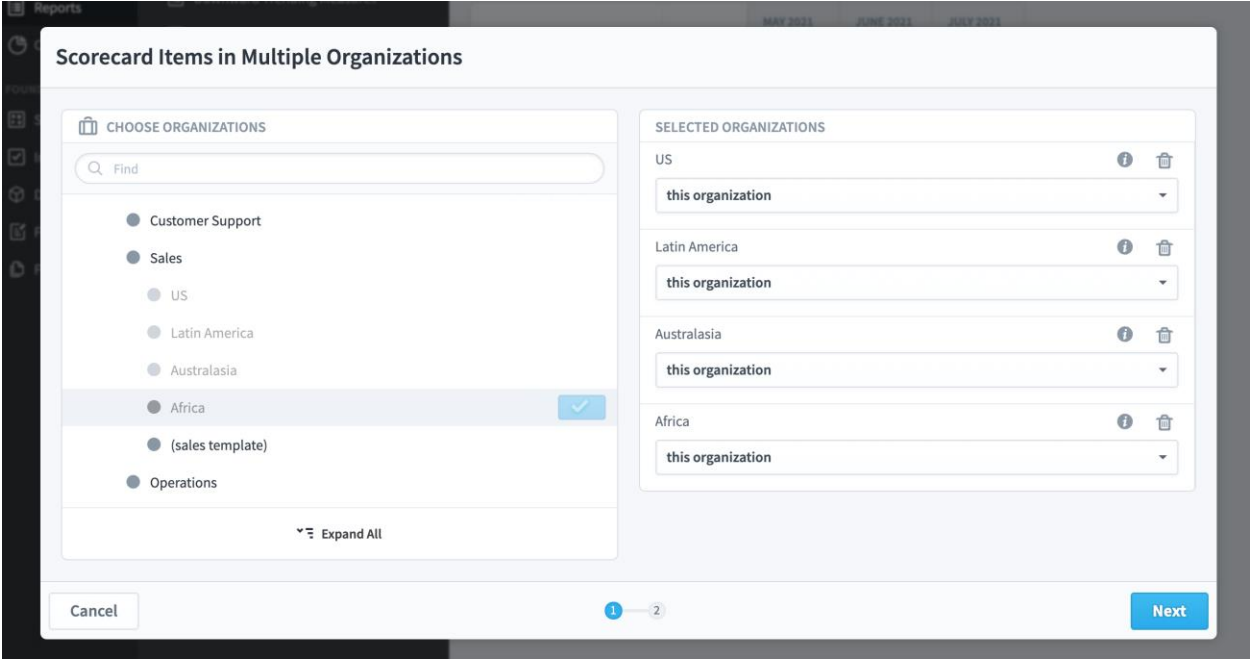
Some types of row filters have calendar period ranges. These are different from the calendar period range you choose for columns. By keeping row filter ranges separate from column ranges, your reports can be much more flexible. For example, you can show the current performance of all KPIs that were red at any point in the last year.

Filter On

Scorecard Items in Multiple Organizations

Cancel Done

This allows you to select scorecard items that are similar across multiple organizations. First you choose which organizations you want to include. In this example we're choosing four organizations that share the same template.

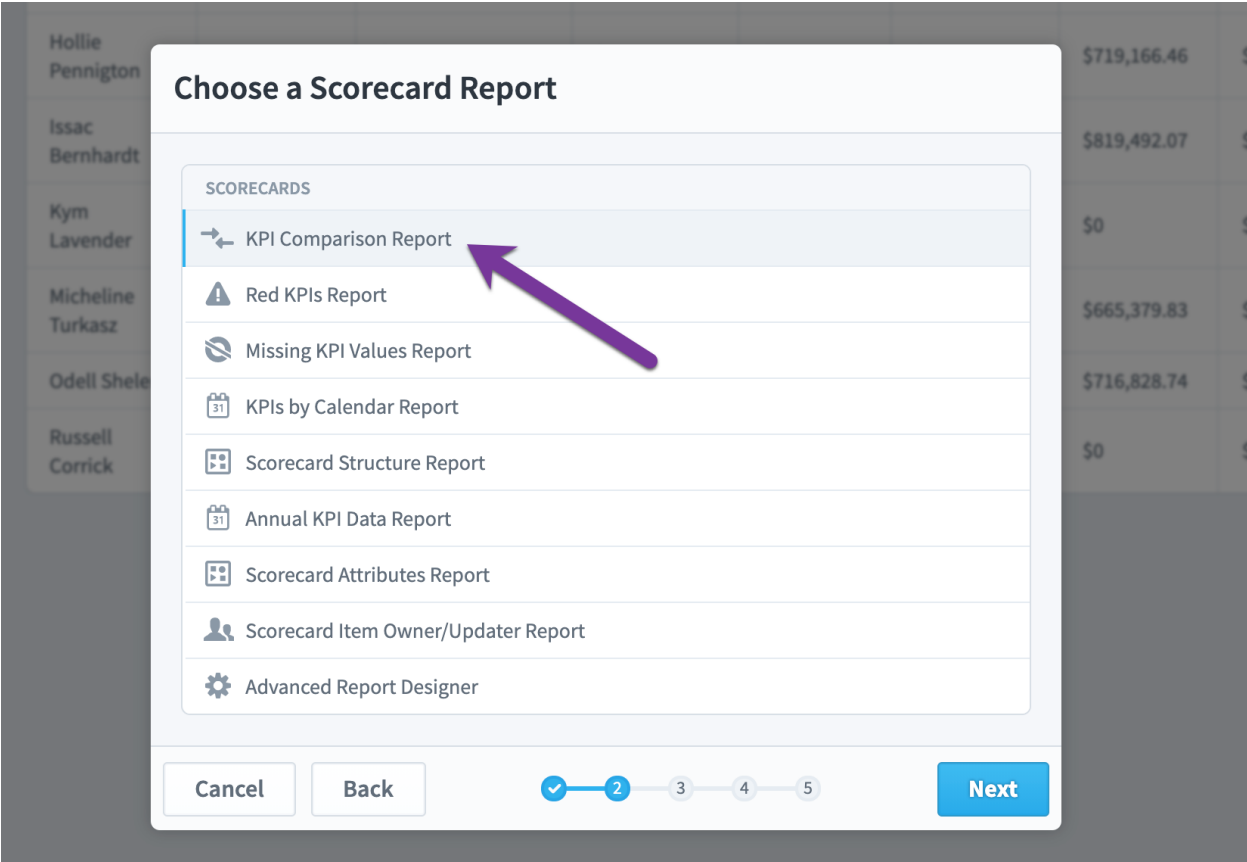


Then you choose which scorecard items you want. When you're done you end up with the same scorecard items for multiple organizations.

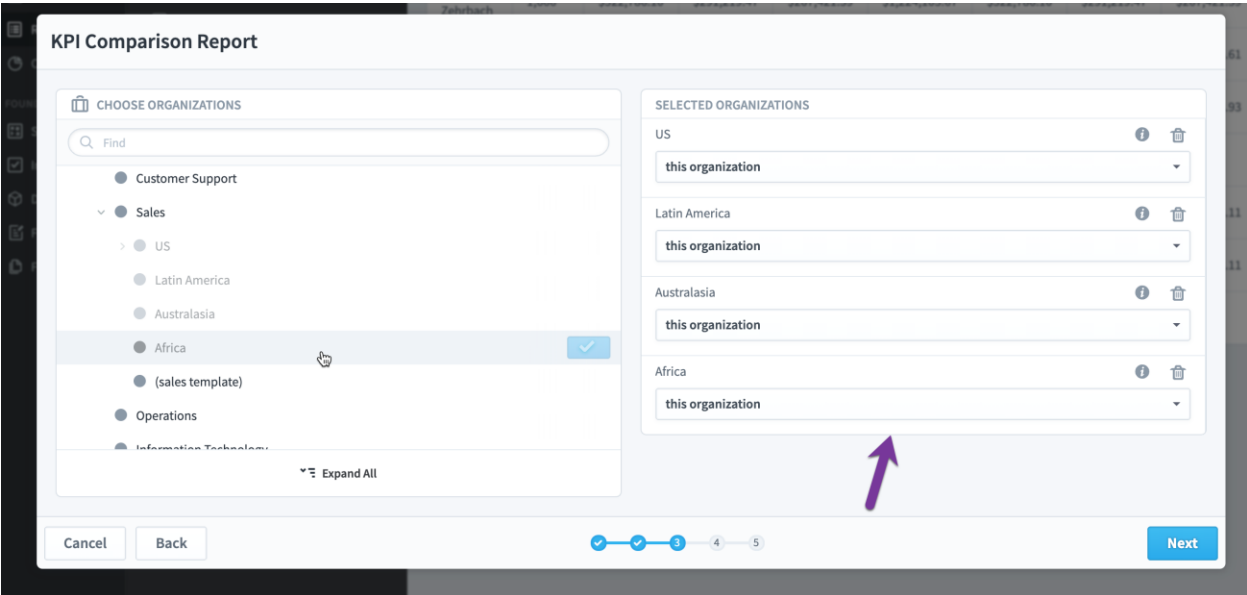
View		Edit	July 2021	<	>
NAME	ORGANIZATION	MAY 2021	JUNE 2021	JULY 2021	
		KPI VALUE	KPI VALUE	KPI VALUE	KPI VALUE
Sales Revenue	Sales	\$5,117,300	\$5,240,300	\$4,821,600	
New Customers	Sales	32	33	34	
Number of Renewals	Sales	40	39	37	
Close ratio	Sales	32.06%	31.01%	30.63%	
Sales Revenue (US)	US	\$3,471,500	\$3,495,500	\$3,262,400	
New Customers (US)	US	24	26	25	
Number of Renewals (US)	US	23	23	23	

KPI comparison report built on report designer

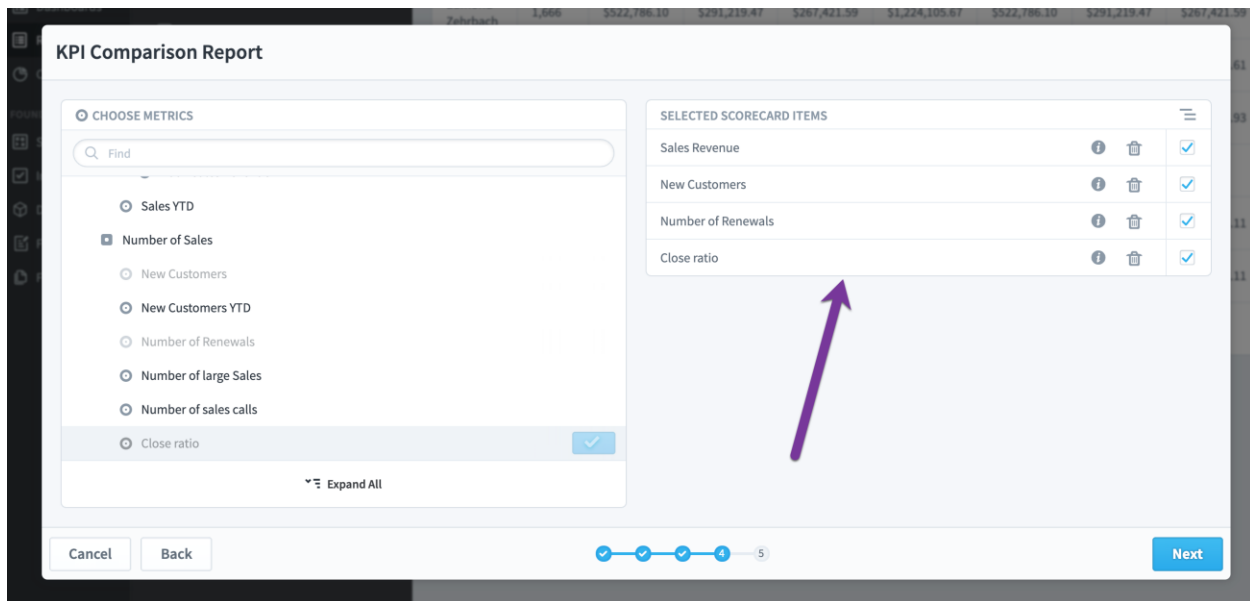
Creating a KPI comparison report in Impact 5 is exactly the same as it was before.



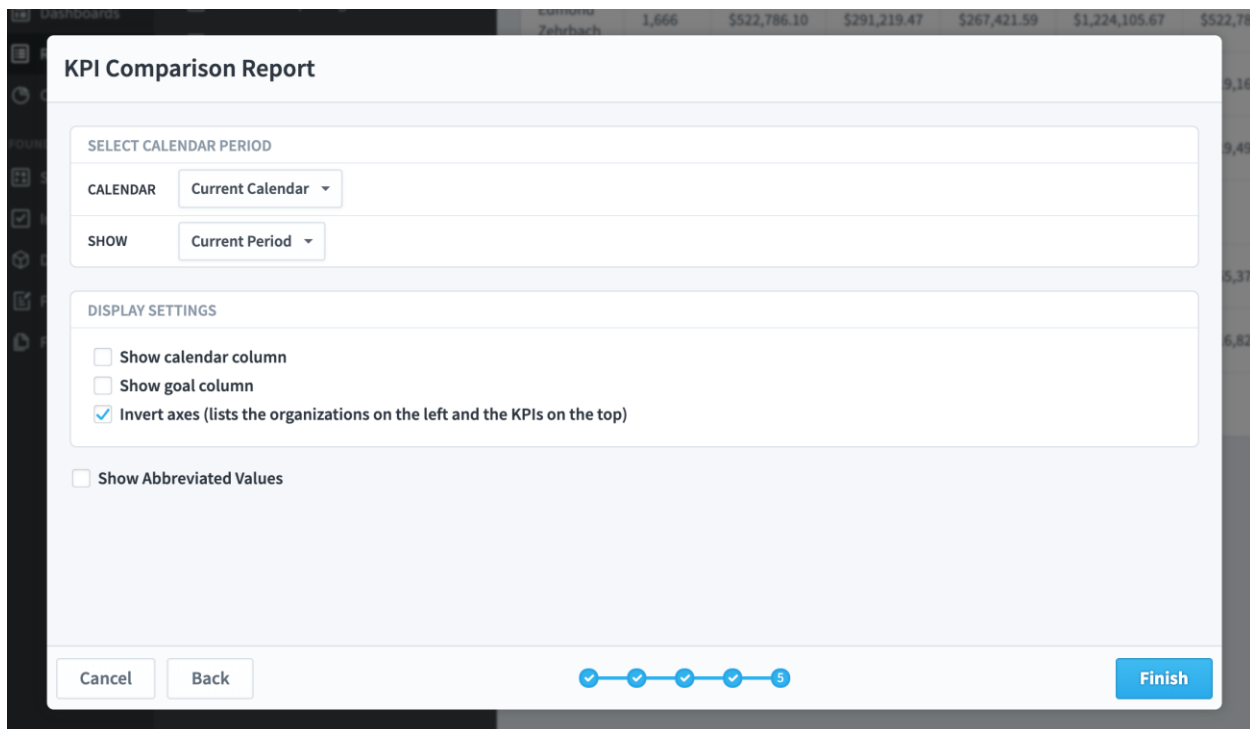
First you choose which organizations you want.



Then you choose the KPIs.



And finally you choose your report options.



The result is a report showing the KPI values across the organizations.

ORGANIZATION	KPI VALUE									
	AUGUST 2021									
	SALES REVENUE		PRODUCT SALES REVENUE		TRAINING SALES REVENUE		BOOK SALES REVENUE		NEW CUSTOMERS	NUMBER OF RENEWALS
Africa	\$318K	\$128K	\$167K	\$23.2K	\$3	\$7	\$0.39			
Australasia	\$505K	\$244K	\$243K	\$18.1K	\$4	\$2	\$0.23			
Latin America	\$579K	\$390K	\$147K	\$42.3K	\$1	\$6	\$0.34			
...			

What's new in Impact 5, however, is that the KPI comparison report is built on the new report designer. That means you have full formatting capabilities as well as the ability to show additional information. For example, here we're showing both the KPI's value and its Goal.

ORGANIZATION	AUGUST 2021													
	SALES REVENUE		PRODUCT SALES REVENUE		TRAINING SALES REVENUE		BOOK SALES REVENUE		NEW CUSTOMERS		NUMBER OF RENEWALS		CLOSE RATIO	
	KPI VALUE	GOAL SUM	KPI VALUE	GOAL SUM	KPI VALUE	GOAL SUM	KPI VALUE	GOAL SUM	KPI VALUE	GOAL SUM	KPI VALUE	GOAL SUM	KPI VALUE	GOAL SUM
Africa	\$318K	\$890K	\$128K	\$600K	\$167K	\$250K	\$23.2K	\$40K	\$3	\$6	\$7	\$6	\$0.39	\$0.40
Australasia	\$505K	\$890K	\$244K	\$600K	\$243K	\$250K	\$18.1K	\$40K	\$4	\$6	\$2	\$6	\$0.23	\$0.40
Latin America	\$579K	\$890K	\$390K	\$600K	\$147K	\$250K	\$42.3K	\$40K	\$1	\$6	\$6	\$6	\$0.34	\$0.40
...

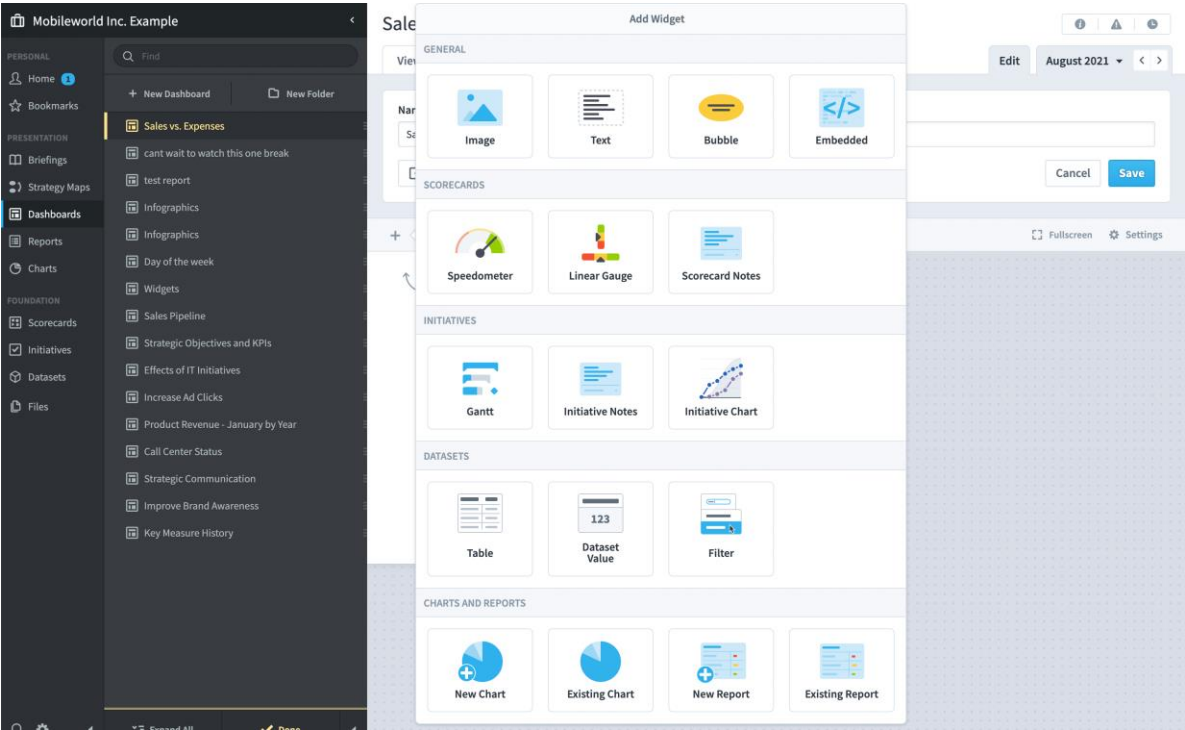
And here we're showing the KPI values for two periods.

ORGANIZATION	KPI VALUE													
	SALES REVENUE		PRODUCT SALES REVENUE		TRAINING SALES REVENUE		BOOK SALES REVENUE		NEW CUSTOMERS		NUMBER OF RENEWALS		CLOSE RATIO	
	JULY 2021	AUGUST 2021	JULY 2021	AUGUST 2021	JULY 2021	AUGUST 2021	JULY 2021	AUGUST 2021	JULY 2021	AUGUST 2021	JULY 2021	AUGUST 2021	JULY 2021	AUGUST 2021
Africa	\$477K	\$318K	\$477K	\$318K	\$477K	\$318K	\$477K	\$318K	\$477K	\$318K	\$477K	\$318K	\$477K	\$318K
Australasia	\$418K	\$505K	\$418K	\$505K	\$418K	\$505K	\$418K	\$505K	\$418K	\$505K	\$418K	\$505K	\$418K	\$505K
Latin America	\$665K	\$579K	\$665K	\$579K	\$665K	\$579K	\$665K	\$579K	\$665K	\$579K	\$665K	\$579K	\$665K	\$579K
...

Dashboards

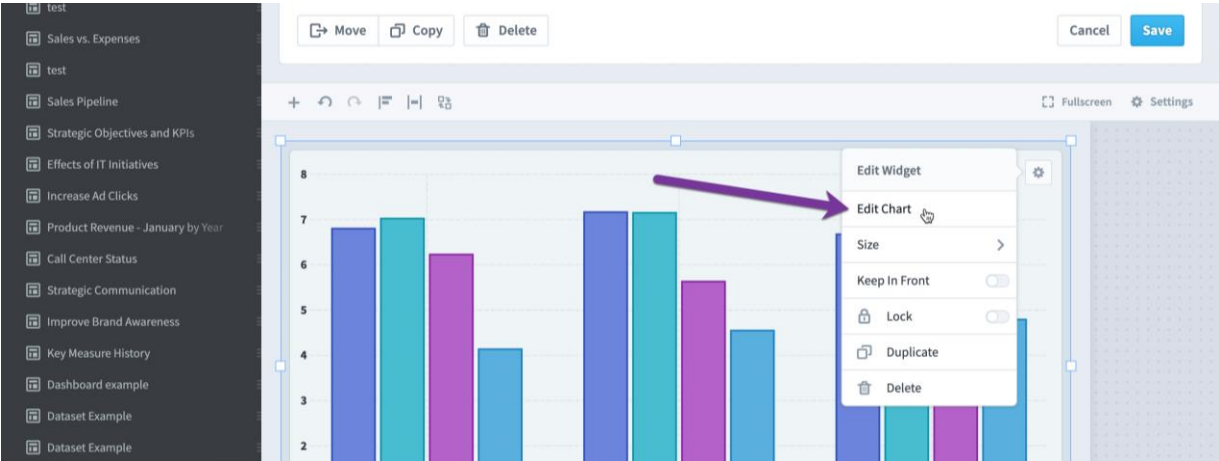
Reorganized dashboards "add widget" menu

The "Add Widget" menu for dashboards has been reorganized to make adding widgets more intuitive. There are now sections for both Datasets and Charts & Reports.

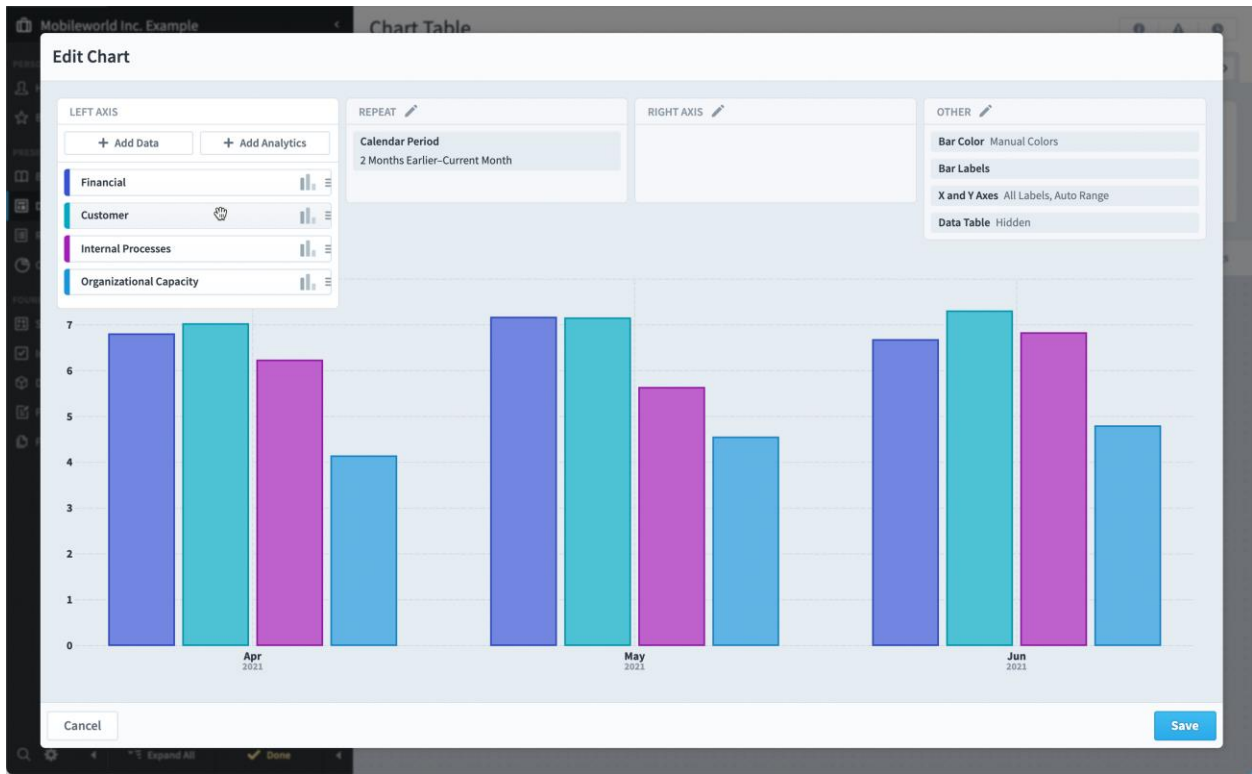


Editing reports and charts on dashboards

Editing charts and reports on dashboards is now done in a full-screen dialog. Here we're choosing "Edit Chart" on a dashboard widget.



The dialog that opens has all of the chart building functionality from the Charts section. You can see the changes you make to your chart instantly.



Similarly, you can now edit Reports directly on dashboards.

report

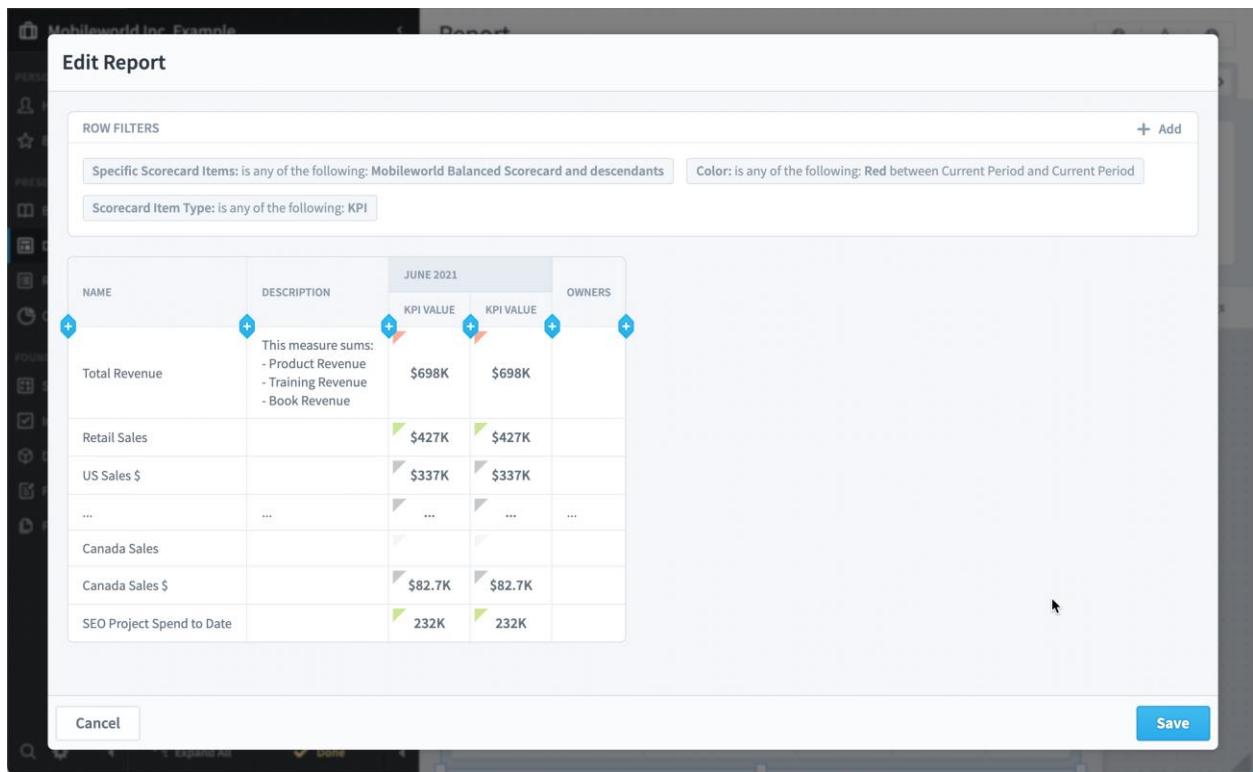
Move Copy Delete Cancel

Fullscreen

NAME	DESCRIPTION	JUNE 2021		OWNER
		KPI VALUE	KPI VALUE	
Total Revenue	This measure sums: - Product Revenue - Training Revenue - Book Revenue	\$698K	\$698K	
Retail Sales		\$427K	\$427K	
US Sales \$		\$337K	\$337K	
US Sales \$		\$337K	\$337K	
Canada Sales				
Canada Sales \$		\$82.7K	\$82.7K	
SEO Project Spend to Date		232K	232K	

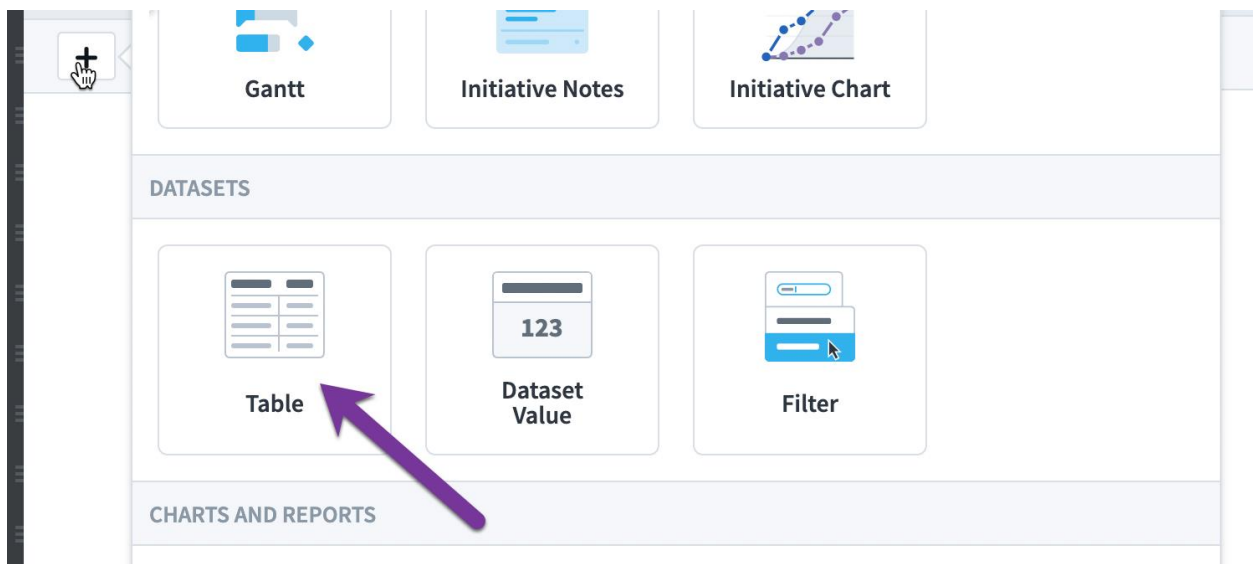
- Edit Widget
- Edit Report
- Set Report Title
- Font Size Adjustment >
- Cell Margin Size >
- Background >
- Size >
- Column Headers
- Keep In Front
- Lock
- Duplicate
- Delete

Again, this is exactly the same way as you'd edit reports in the Reports section.

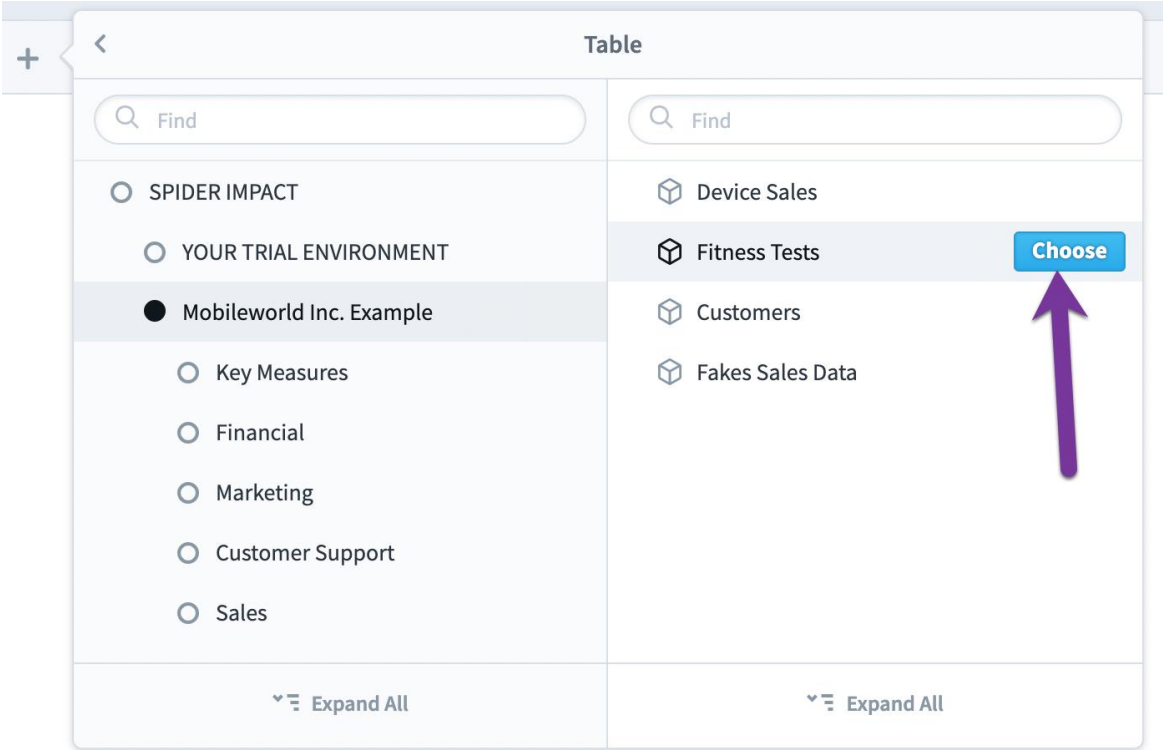


Dataset table widgets

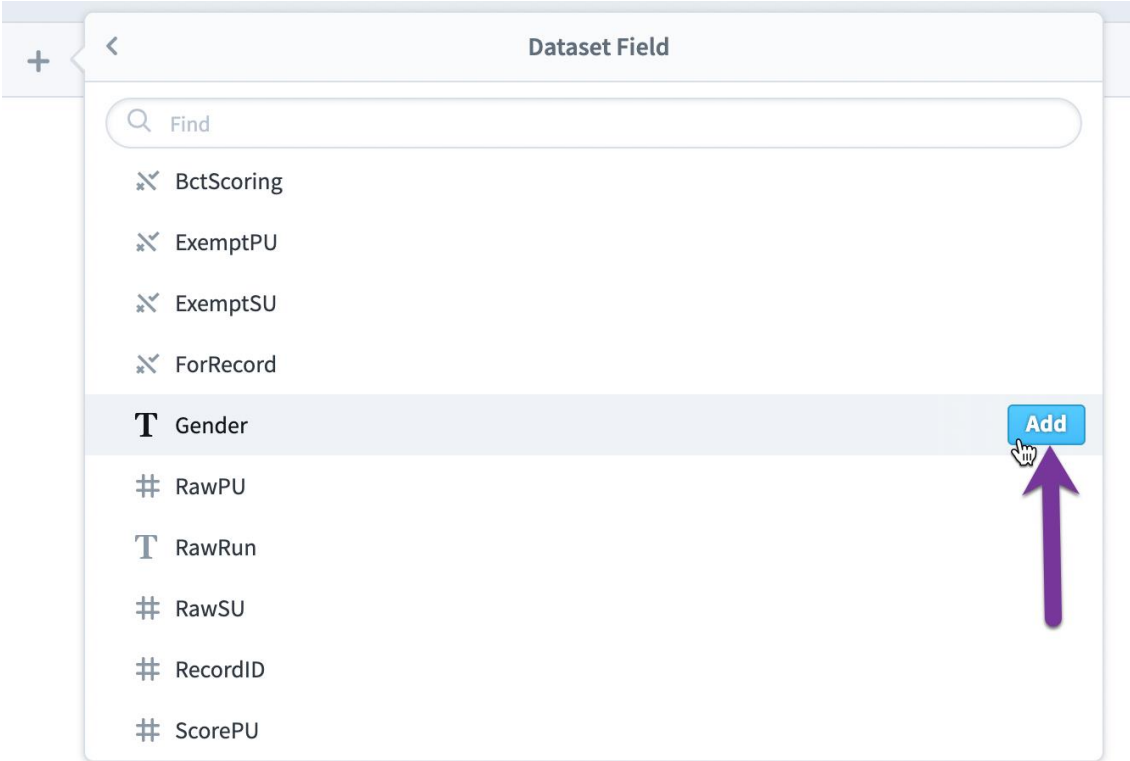
The first type of dashboard widget we'll add is the Datasets Table widget. To do this, we'll click the + button in the upper left corner and choose the Table widget in the Datasets section.



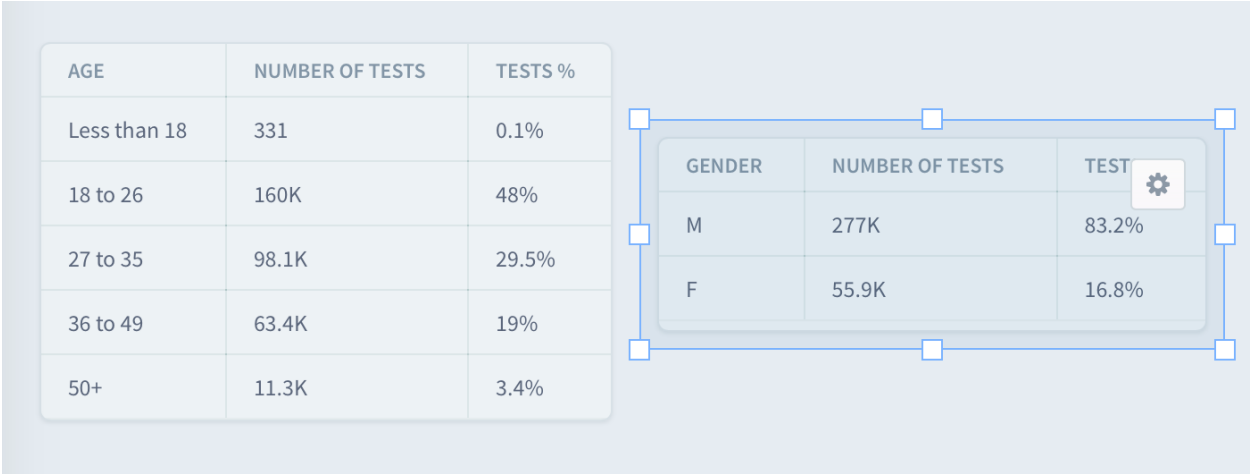
Then we'll choose the Fitness Tests dataset.



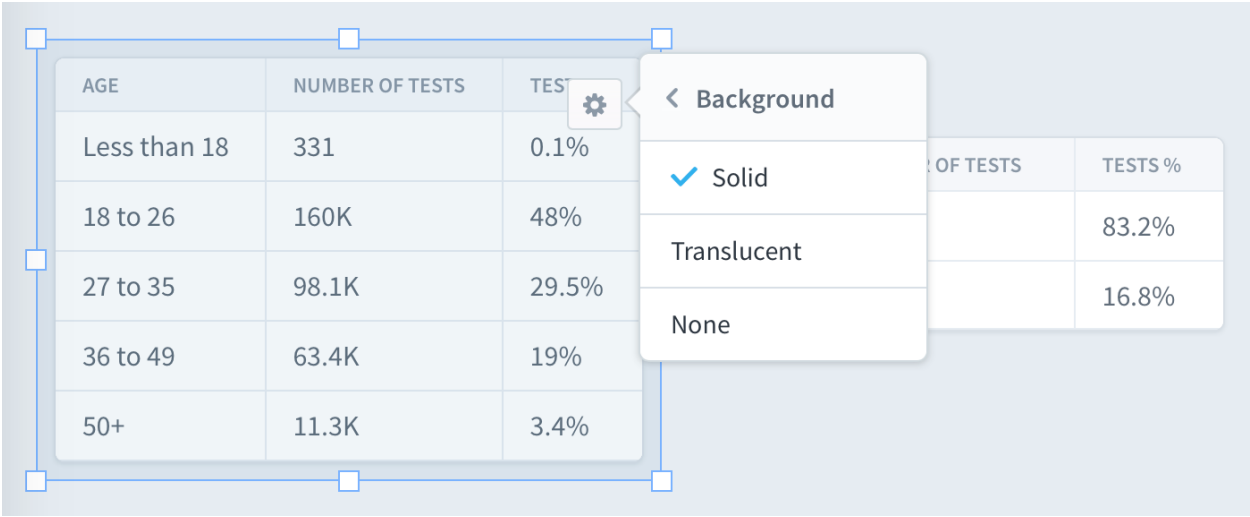
Then click the "add" button for the Age and Gender fields.



This adds two field tables to our dashboard canvas. They're exactly the same as the tables that we're used to seeing on the Datasets Explore tab, except that we can drag and resize them on our freeform dashboard canvas.



We can change all kinds of widget formatting options like background, font size, and rounding of numbers.



This is what it looks like when we save and click to the Dashboards View tab.

View Edit May 2019 < >

AGE	NUMBER OF TESTS	TESTS %
Less than 18	331	0.1%
18 to 26	160K	48%
27 to 35	98.1K	29.5%
36 to 49	63.4K	19%
50+	11.3K	3.4%

GENDER	NUMBER OF TESTS	TESTS %
M	277K	83.2%
F	55.9K	16.8%

Just like on the Datasets Explore tab, when you click on a row in a Dataset Table widget, it filters all of the results on the dashboard including the other widgets.

View Edit May 2019 < >

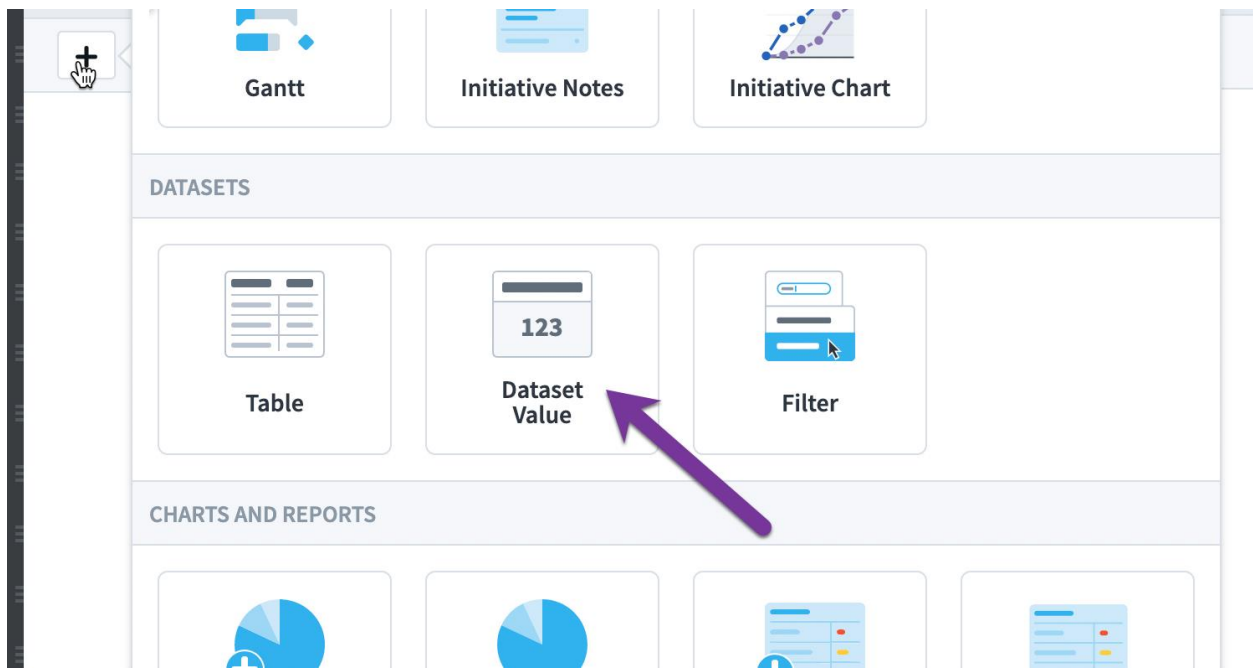
AGE	NUMBER OF TESTS	TESTS %
Less than 18	105	0.2%
18 to 26	28.2K	50.5%
27 to 35	16K	28.6%
36 to 49	9,707	17.4%
50+	1,881	3.4%

< Back is F

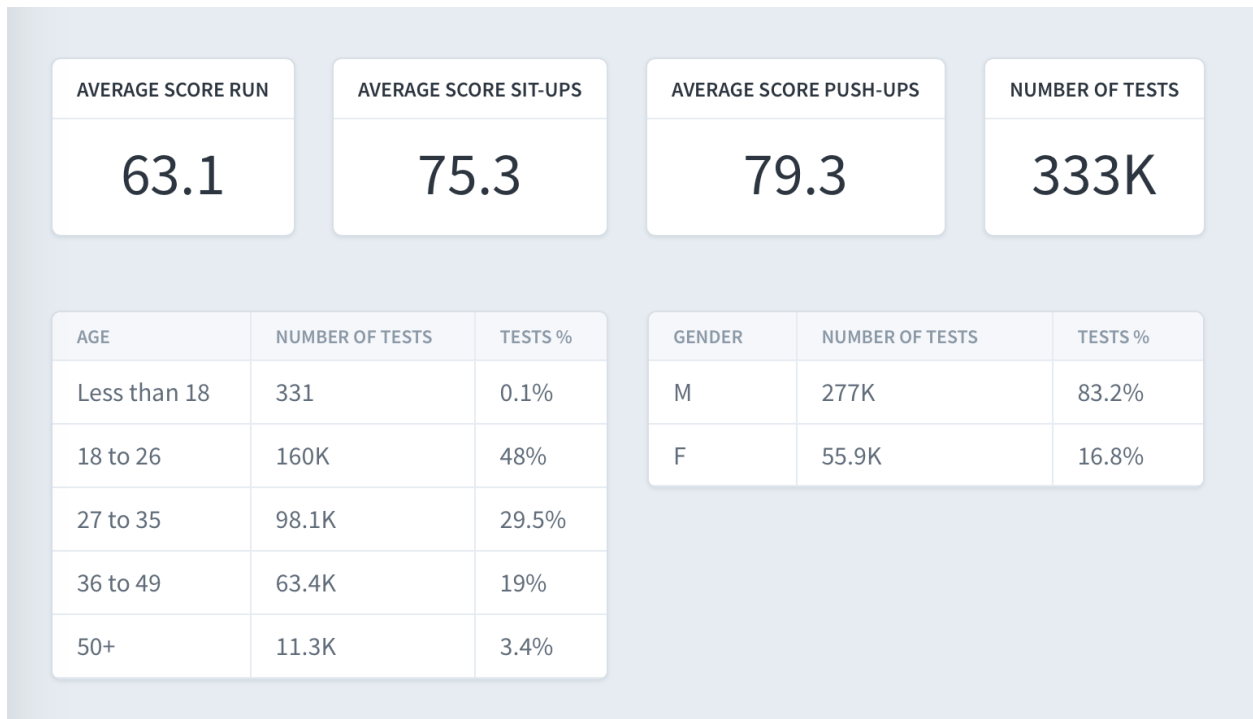
GENDER	NUMBER OF TESTS	TESTS %
F	55.9K	100%

Dataset value widgets

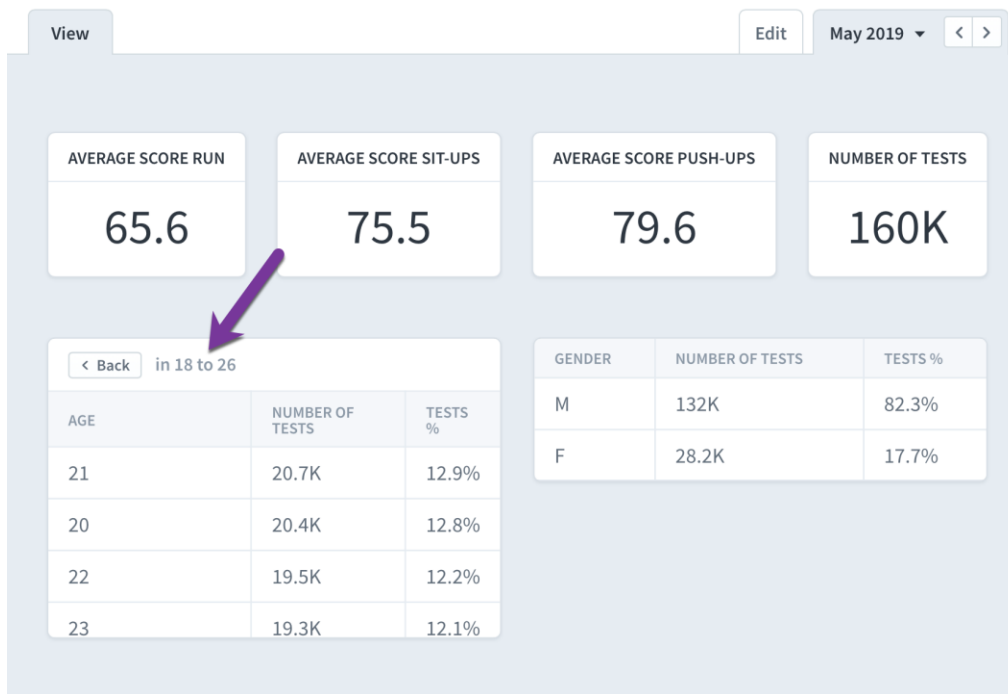
The next type of widget that we'll add to the dashboard are Dataset Value widgets. These are similar to Dataset Table widgets except that they only show a single value.



In this example we'll add the average sit-up score, the average push-up score, the average run score, and the total number of tests.

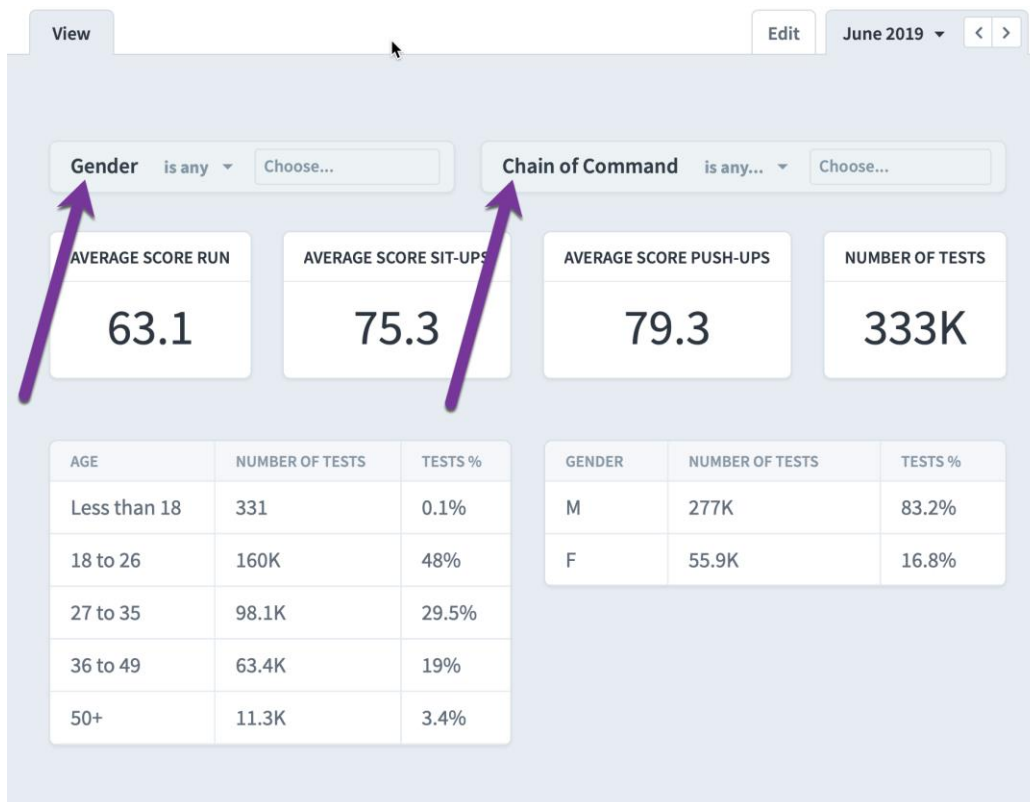


As before, if you click on a row in a table widget, all of the widgets on the dashboard update with new values, including the Single Value widgets.

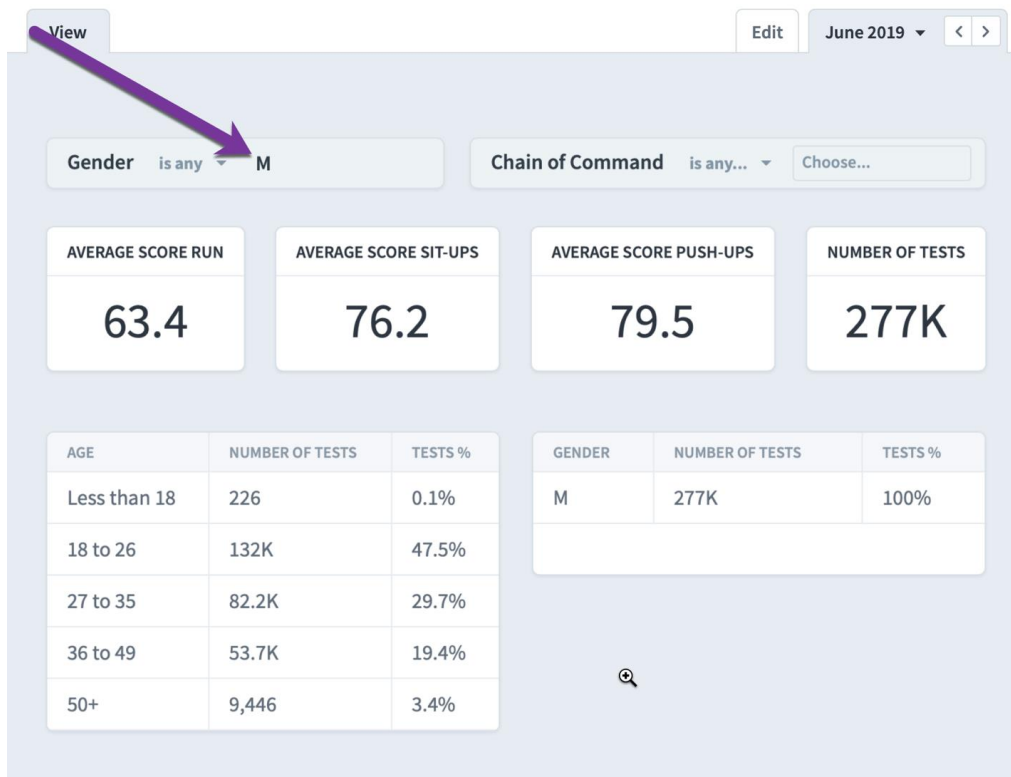


Dataset filter widgets

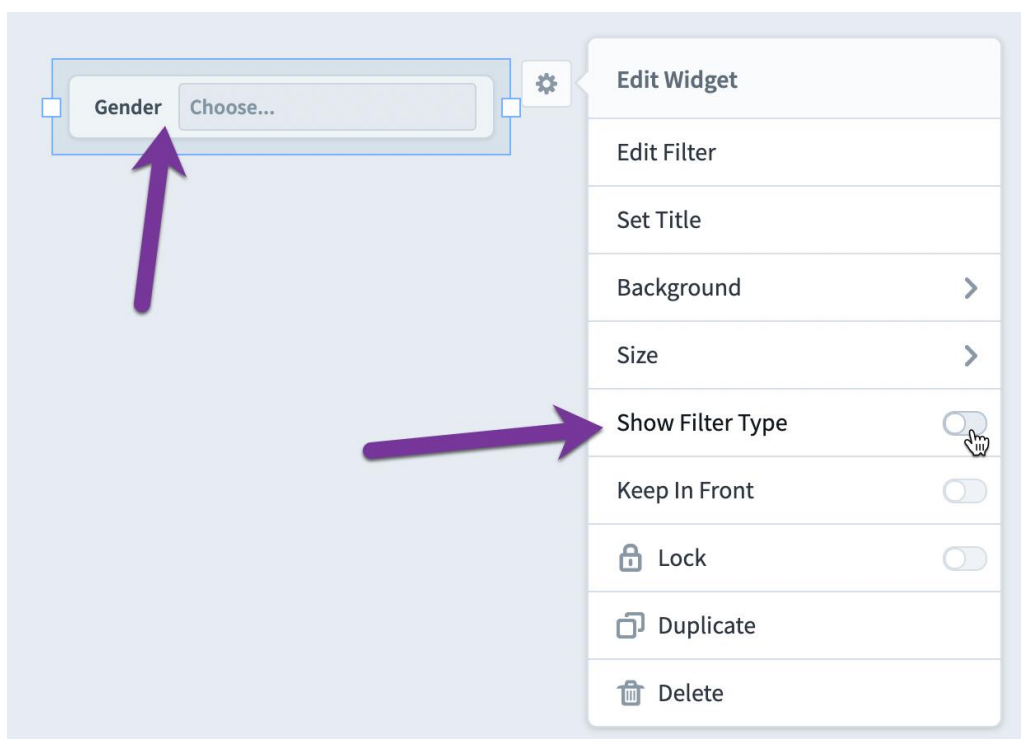
Another type of dataset dashboard widget are Dataset Filter widgets. They allow you to quickly apply filters to your dashboard, without taking up as much space as a Dataset Table widget.



Here we've clicked on the Gender dataset filter widget, and we've applied a filter of Male.



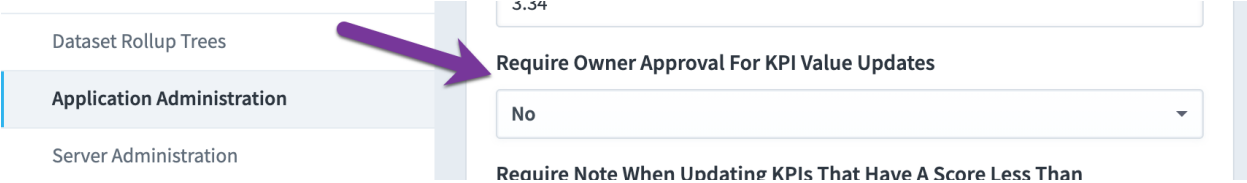
Turning off the filter type allows filter widgets to be even more compact.



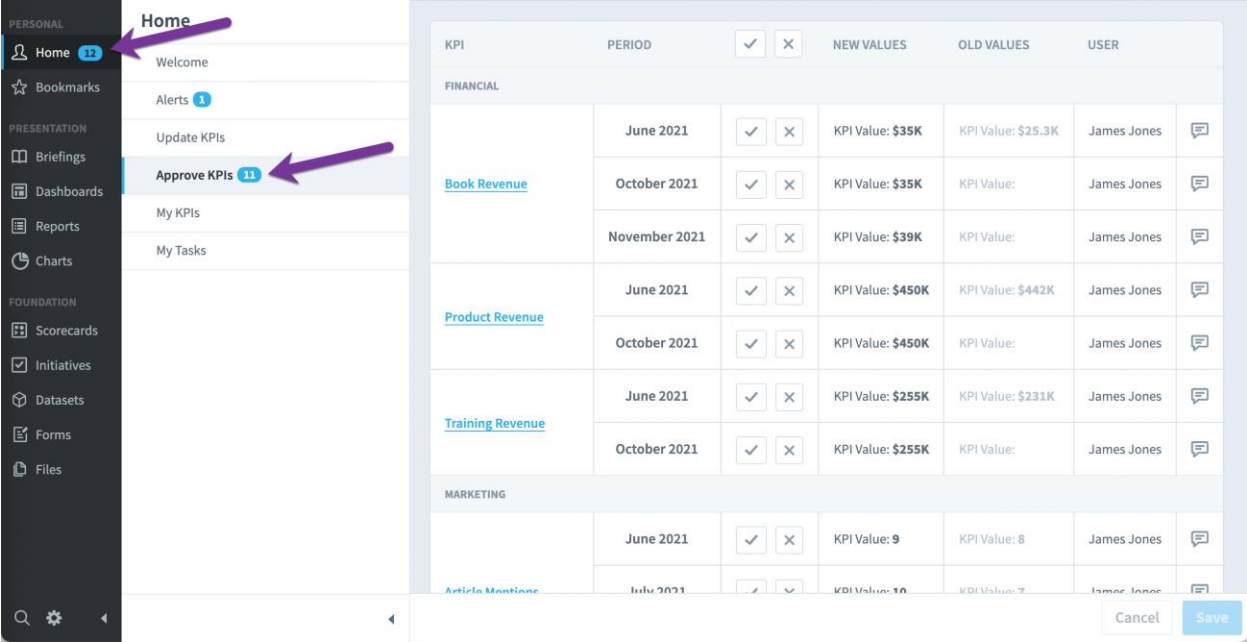
Scorecards

KPI update approval

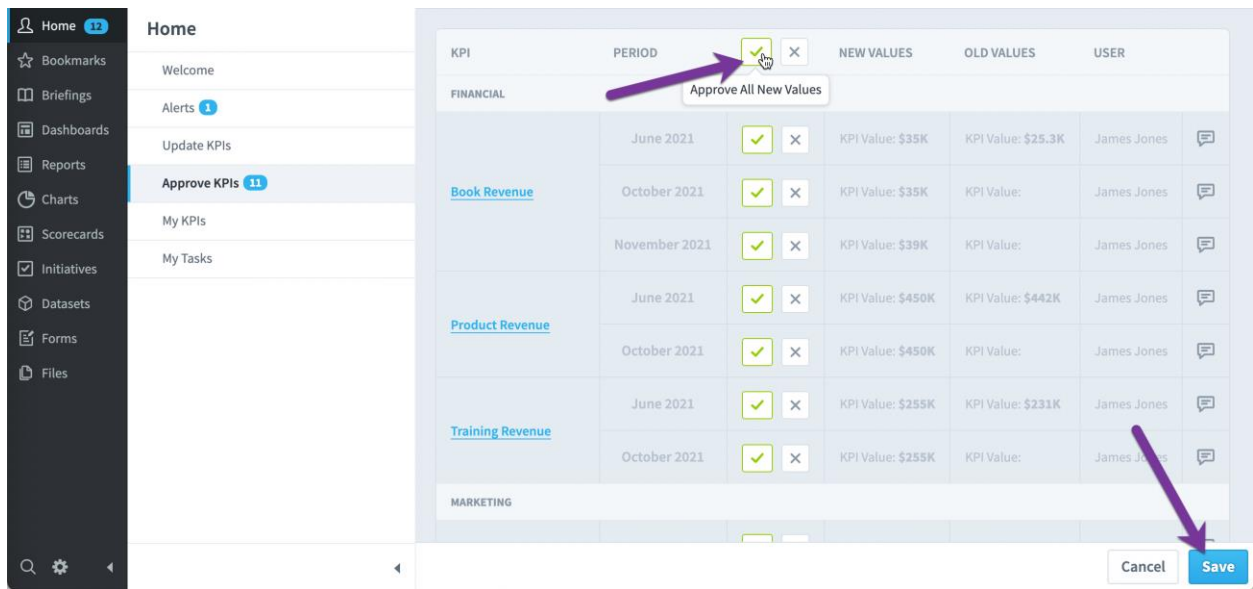
There's a new application configuration setting called "Require Owner Approval For KPI Value Updates" that defaults to off.



When enabled, all updates to KPIs that have owners will go into an approval queue. KPI owners will receive an alert that they have values to approve, and they can visit the Approve KPIs screen in the Home section to do this.



You can approve or reject all pending updates in your queue by clicking on one of the "all" buttons on the top of the list and then clicking Save.



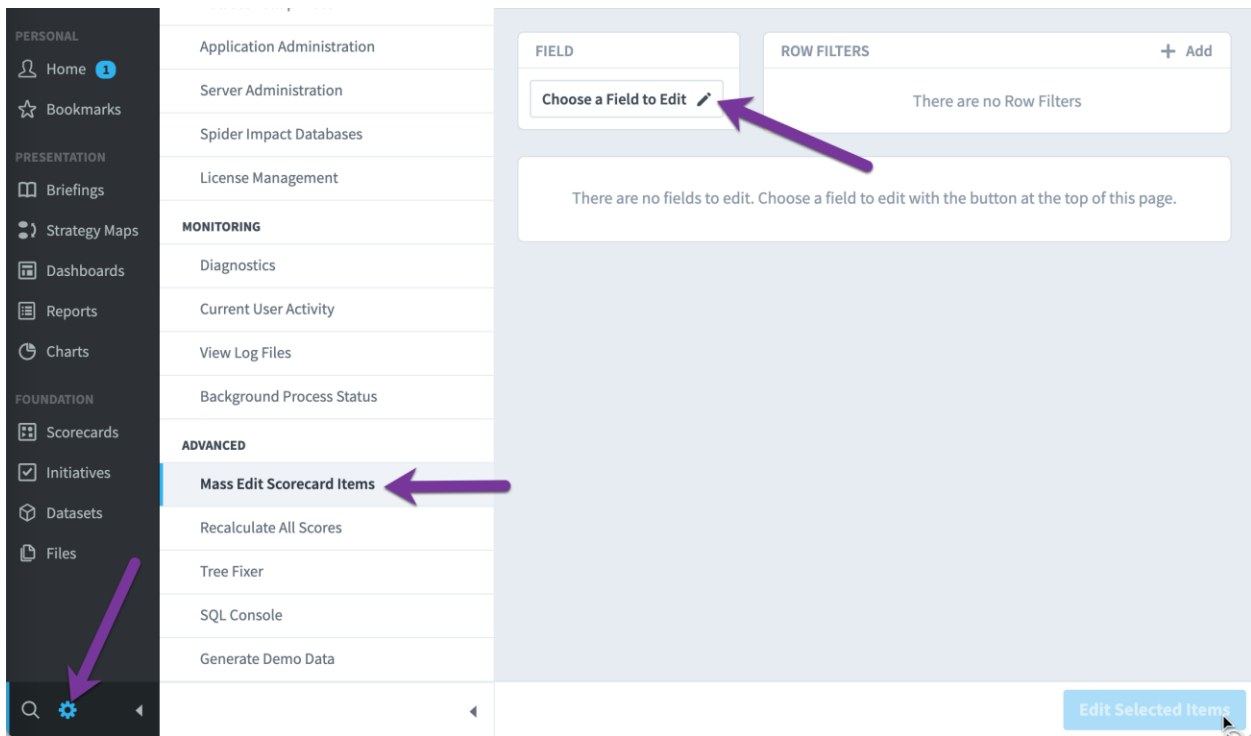
You can also select individual updates to be approved or rejected.

KPI	PERIOD	<input type="checkbox"/>	<input type="checkbox"/>	NEW VALUES	OLD VALUES	USER
FINANCIAL						
Book Revenue	June 2021	<input type="checkbox"/>	<input type="checkbox"/>	KPI Value: \$35K	KPI Value: \$25.3K	James Jones
	October 2021	<input type="checkbox"/>	<input type="checkbox"/>	KPI Value: \$35K	KPI Value:	James Jones
	November 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	KPI Value: \$39K	KPI Value:	James Jones
Product Revenue	June 2021	<input type="checkbox"/>	<input type="checkbox"/>	KPI Value: \$450K	KPI Value: \$442K	James Jones
	October 2021	<input type="checkbox"/>	<input type="checkbox"/>	KPI Value: \$450K	KPI Value:	James Jones
Training Revenue	June 2021	<input type="checkbox"/>	<input type="checkbox"/>	KPI Value: \$255K	KPI Value: \$231K	James Jones
	October 2021	<input type="checkbox"/>	<input type="checkbox"/>	KPI Value: \$255K	KPI Value:	James Jones
MARKETING						

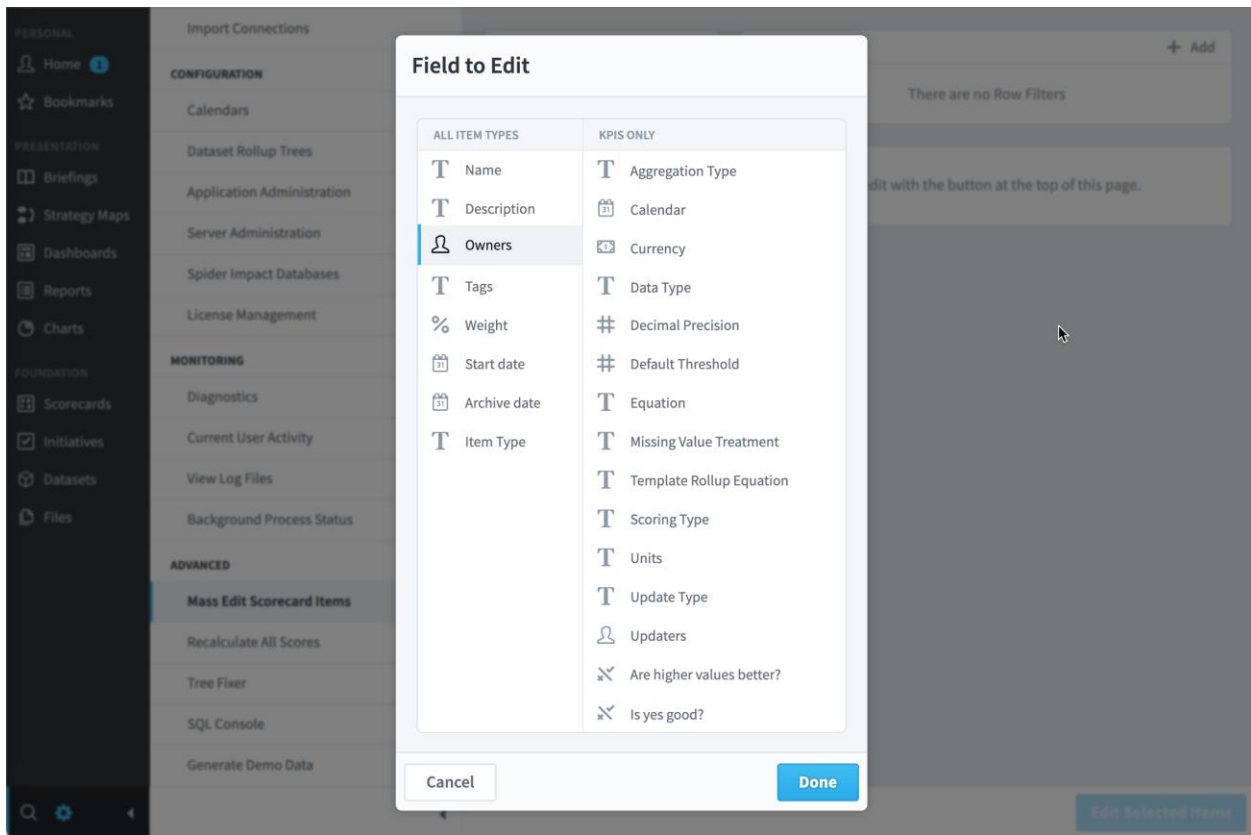
If a KPI has no owners, or if its only owner is the person who updated the KPI with a new value, the update will not go into the approval queue and will instead appear immediately.

Editing multiple scorecard items at once

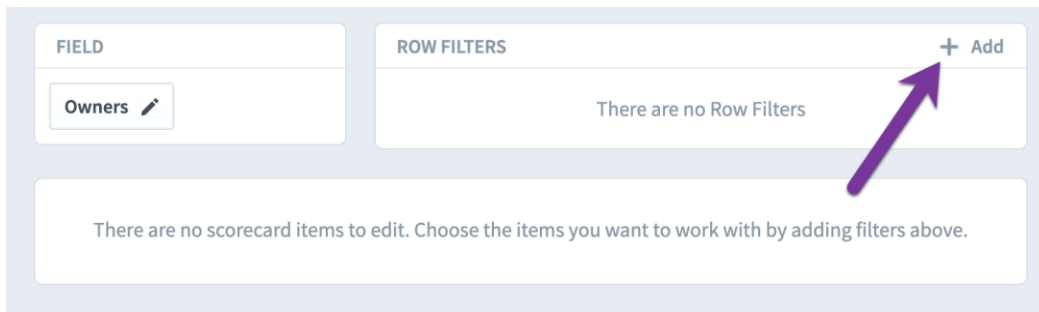
Mass-edit functionality has been moved to the Administration section. And has been redesigned to be optimized only for editing. To start, click the "Choose a Field to Edit" button.



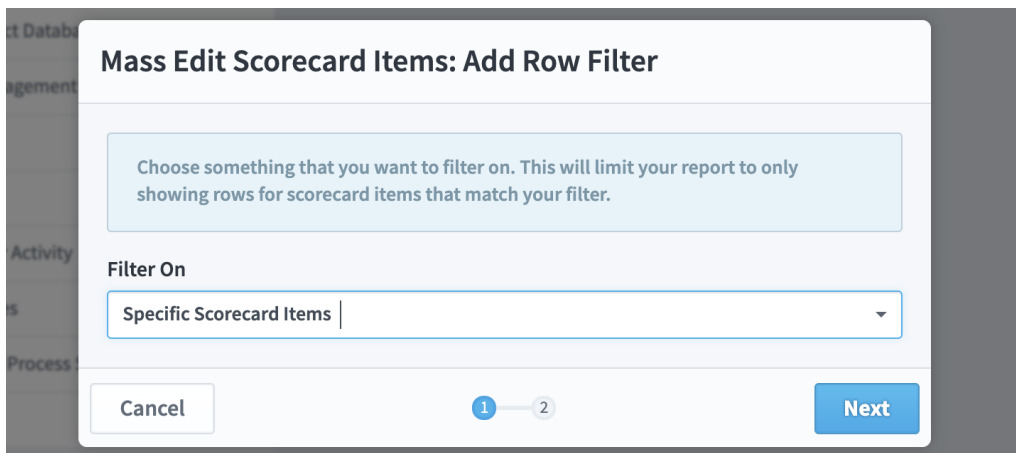
In this example we'll choose Owners.



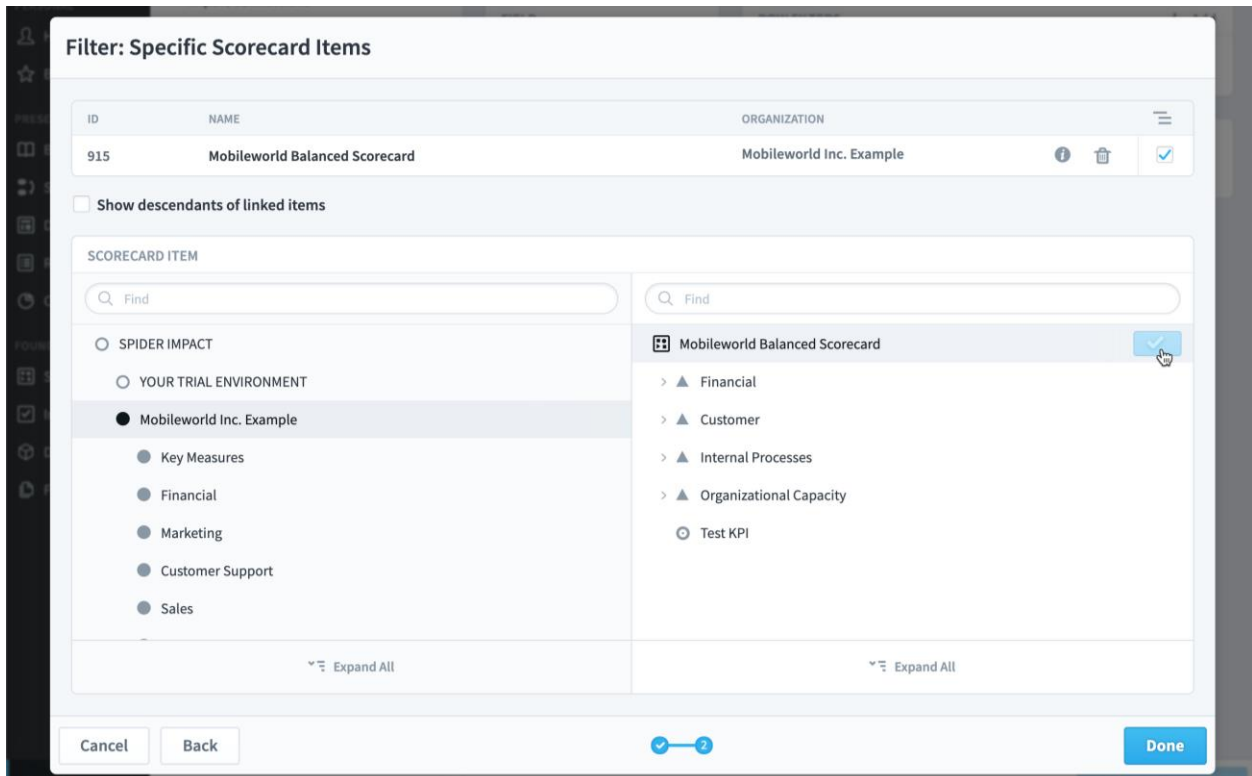
Next, we'll add a filter to choose which scorecard items show up to edit.



The default filter is "Specific Scorecard Items," and we'll use that here.



We'll add the entire "Mobileworld Balanced Scorecard" and click Done.



Now we can see all of the scorecard items for the Mobileworld Balanced Scorecard. You can edit a few at a time, but we're going to select all and click "Edit Selected Items".

The screenshot shows a web interface for managing scorecard items. On the left is a navigation menu with categories like CONFIGURATION, MONITORING, and ADVANCED. The 'Mass Edit Scorecard Items' option is selected. The main area displays a table of 37 scorecard items, all of which are checked. A purple arrow points to the first checkmark. At the top right, a 'ROW FILTERS' box shows a filter for 'Mobileworld Balanced Scorecard and descendants'. At the bottom right, a blue button labeled 'Edit Selected Items' is highlighted with a purple arrow.

	FIELD	NAME	ORGANIZATION	OWNERS
<input checked="" type="checkbox"/>	Owners			
<input checked="" type="checkbox"/>		Mobileworld Balanced Scorecard	Mobileworld Inc. Example	
<input checked="" type="checkbox"/>		Financial	Mobileworld Inc. Example	
<input checked="" type="checkbox"/>		Increase Revenue	Mobileworld Inc. Example	
<input checked="" type="checkbox"/>		Product Revenue	Mobileworld Inc. Example	Full User
<input checked="" type="checkbox"/>		Training Revenue	Mobileworld Inc. Example	Full User
<input checked="" type="checkbox"/>		Book Revenue	Mobileworld Inc. Example	Full User
<input checked="" type="checkbox"/>		Total Revenue	Mobileworld Inc. Example	
<input checked="" type="checkbox"/>		Improve Profitability	Mobileworld Inc. Example	
<input checked="" type="checkbox"/>		Net Operating Profit (before tax)	Mobileworld Inc. Example	
<input checked="" type="checkbox"/>		% Net Operating Profit	Mobileworld Inc. Example	
<input checked="" type="checkbox"/>		Reduce Sales Overhead Cost	Mobileworld Inc. Example	
<input checked="" type="checkbox"/>		Sales & General Admin	Mobileworld Inc. Example	

We'll add the Human Resources group as owners.

The screenshot shows a modal dialog titled 'Edit Selected Items: Owners'. It has an 'ACTION' dropdown set to 'Add the following owners'. Below is an 'OWNERS' section with a search input field containing 'Start Typing...'. A list item for 'Human Resources (Update Users)' is shown with a trash icon to its right. A purple arrow points to the 'Human Resources' entry, and another purple arrow points to the 'Save' button at the bottom right. A 'Cancel' button is at the bottom left.

After clicking Save, we see a message summarizing all of the changes that were made. If some of the changes didn't work, it explains why as well.

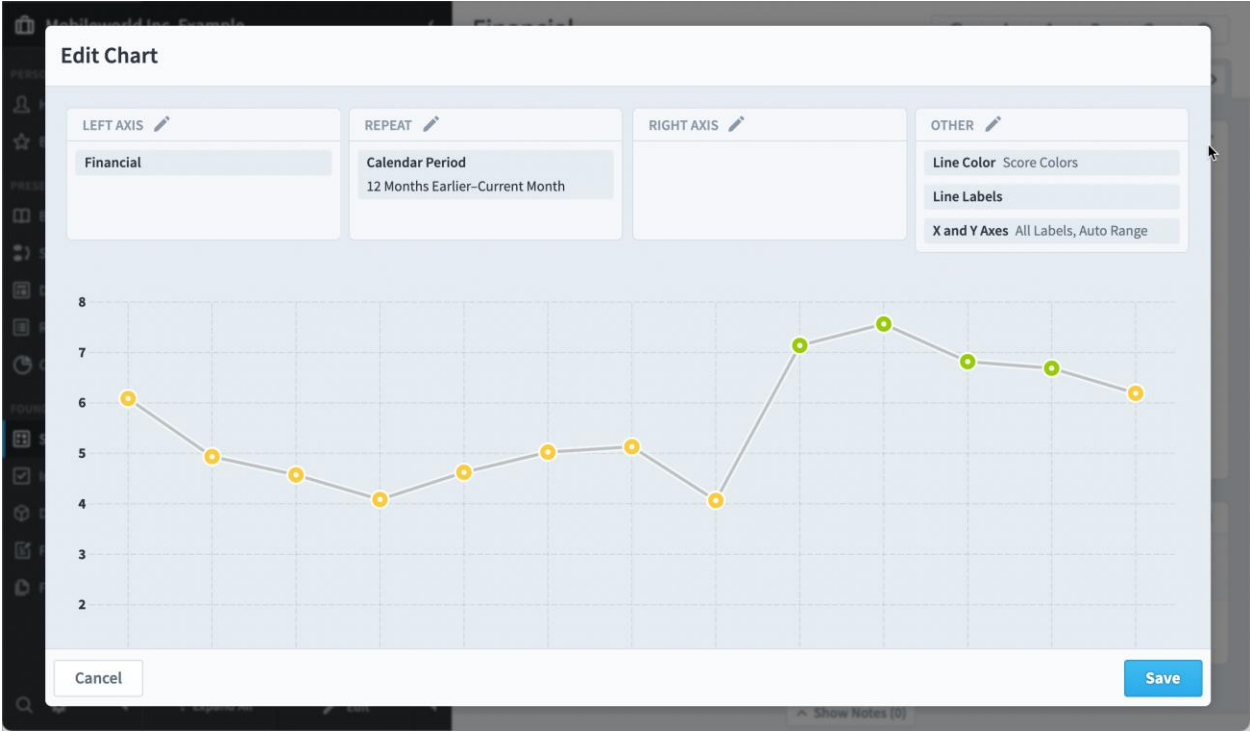
The screenshot shows a user interface for editing scorecard items. At the top, there are sections for 'FIELD' (containing 'Owners') and 'ROW FILTERS' (showing 'Showing 37 of 440 Scorecard Items' and a '+ Add' button). A message box states: 'You successfully edited 0 scorecard items.' Below this, it lists items that were not updated for two reasons: 'These items were not updated because they are linked items:' (Product Revenue, Sales & General Admin, Customer Churn, 14 more....) and 'These items were not updated because the assignees do not have permission to the item:' (Organizational Capacity, Improve Knowledge and Skills, Improve Contract Management, 17 more....). At the bottom, a table header is visible with columns: NAME, ORGANIZATION, and OWNERS.

Editing charts on Scorecards Overview

You can edit charts on the Scorecards Overview by clicking on the chart's edit button.

The screenshot shows a 'Financial' scorecard overview. On the left is a navigation sidebar for 'Mobileworld Inc. Example' with categories like PERSONAL, PRESENTATION, and FOUNDATION. The main content area is titled 'Financial' and includes an 'Overview' tab and 'KPIs' (1). A gauge chart shows a '6.18 SCORE' with a '-0.5' change. To the right is a 'HISTORICAL PERFORMANCE' line chart showing data from Jun 2020 to Jun 2021. A purple arrow points to an 'Edit' button in the top right corner of the line chart.

This opens a chart editing dialog with all of the functionality of the new Charts section. You can add things like background thresholds, reference bands, and other data series.



Import and Export

Regular expression transformations

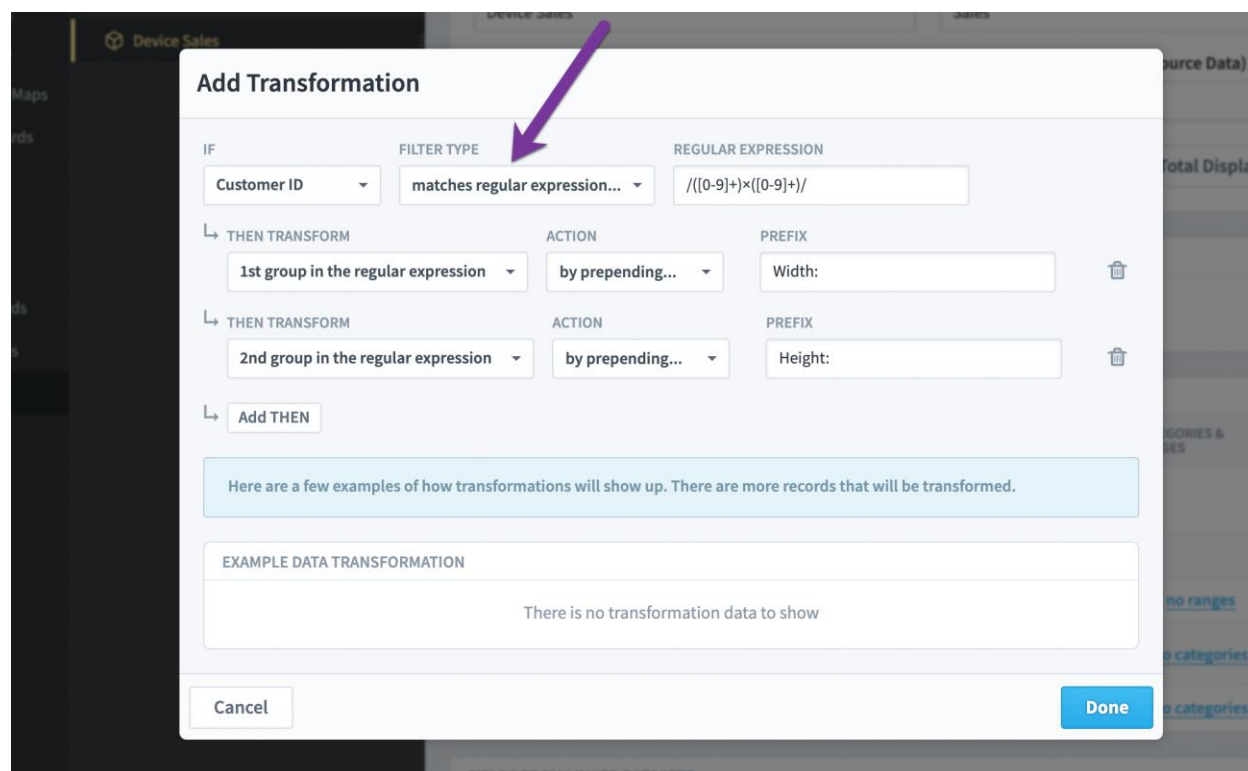
Regular expressions are incredibly powerful for text matching, but they can also be used to transform your data. For example, let's say you have a field that has text values like this:

- 1440×900 pixels
- 1600×900 pixels
- 800×600 inches

And you want to convert it to values like this:

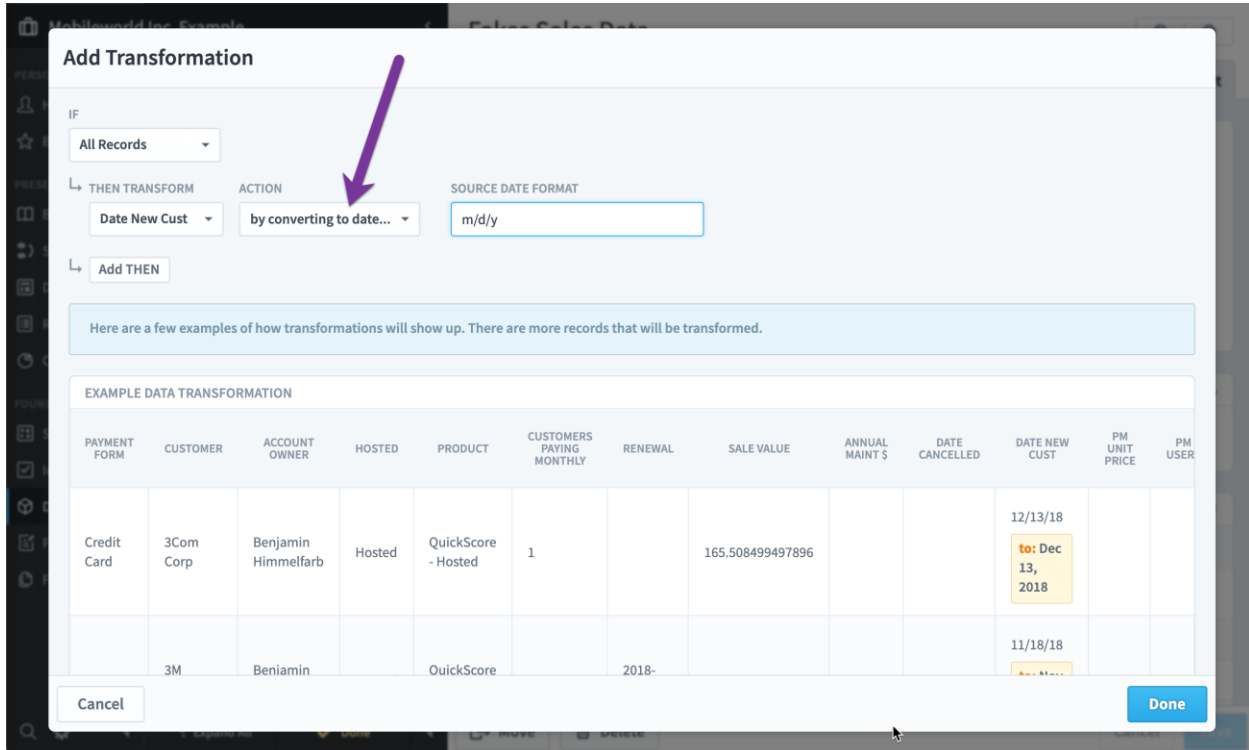
- Width: 1440×Height: 900 pixels
- Width: 1600×Height: 900 pixels
- Width: 800×Height: 600 inches

You can do this by choosing the "matches regular expression" filter type and writing a regular expression with groups. You can then manipulate the groups as separate transformations.



"By converting to date" transformation

There is a new transformation called "by converting to a date" that you can apply to any type of data that you're importing. You tell the software where to find the day, month, and year, and it turns text into dates.



The screenshot shows the 'Add Transformation' dialog box. The 'IF' section is set to 'All Records'. The 'THEN TRANSFORM' section has 'Date New Cust' selected. The 'ACTION' dropdown is set to 'by converting to date...' and is highlighted with a purple arrow. The 'SOURCE DATE FORMAT' is set to 'm/d/y'. Below the configuration, there is a preview table showing data transformation examples.

PAYMENT FORM	CUSTOMER	ACCOUNT OWNER	HOSTED	PRODUCT	CUSTOMERS PAYING MONTHLY	RENEWAL	SALE VALUE	ANNUAL MAINT \$	DATE CANCELLED	DATE NEW CUST	PM UNIT PRICE	PM USER
Credit Card	3Com Corp	Benjamin Himmelfarb	Hosted	QuickScore - Hosted	1		165.508499497896			12/13/18 to: Dec 13, 2018		
	3M	Benjamin		QuickScore		2018-				11/18/18 to: Nov 18, 2018		

Days, months, and years are represented by the following characters:

- d
- m
- y

To separate the days, months, and years, any number of the following characters can be used

- space ()
- hyphen (-)
- comma (,)
- forward slash (/)

For example, if your dates look like 5/15/2020, you'd use m/d/y for the source date format. If your dates look like 3-Mar-19, you'd use d-m-y for the source date format. As long as you tell Spider Impact where to find the data, it's smart enough to determine that Jan, January, and 1 are the same thing.

There are times, of course, where you'll come across date formats that Spider Impact can't parse on its own. For example, February 20th, 2018 could be stored as 022018. In these situations, you can apply regular expression transformations to the data before converting it to a date.

Here we:

1. Start with text like 022018
2. Convert it to text like 02-20-18
3. Parse it into a date with m-d-y

The screenshot shows the 'Add Transformation' dialog box in Spider Impact. It is configured with the following steps:

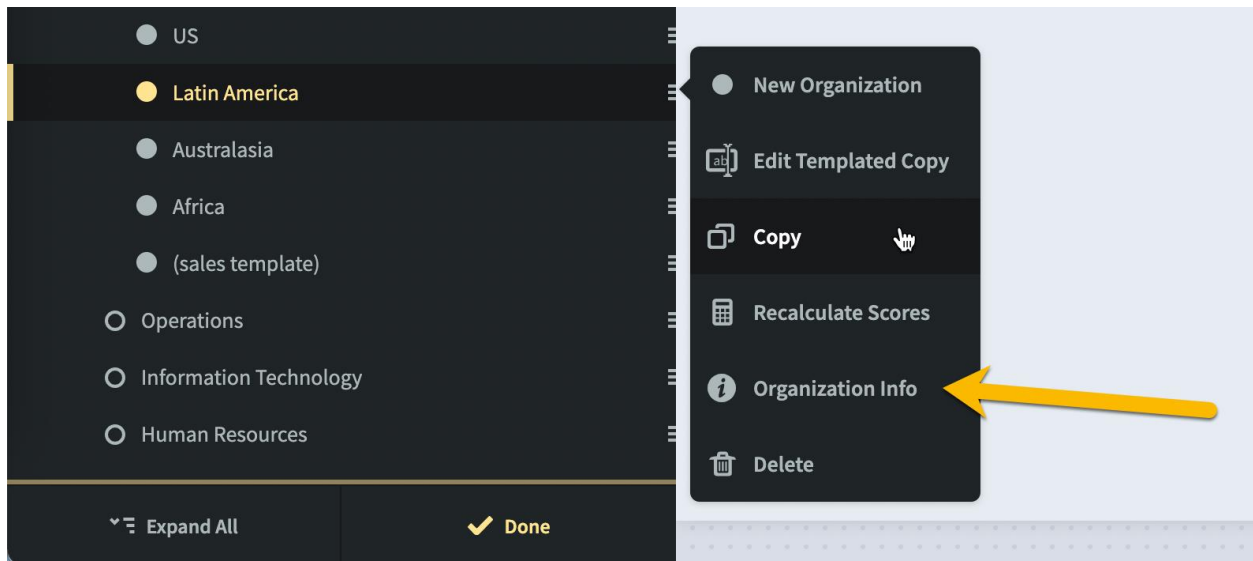
- IF:** Sale Date (dropdown), matches regular expression... (dropdown), REGULAR EXPRESSION: (..)(..)(..)
- THEN TRANSFORM:** 1st group in the regular expression (dropdown), ACTION: by appending... (dropdown), SUFFIX: -
- THEN TRANSFORM:** 2nd group in the regular expression (dropdown), ACTION: by appending... (dropdown), SUFFIX: -
- THEN TRANSFORM:** Sale Date (dropdown), ACTION: by converting to date... (dropdown), SOURCE DATE FORMAT: m-d-y

At the bottom, there is an 'Add THEN' button.

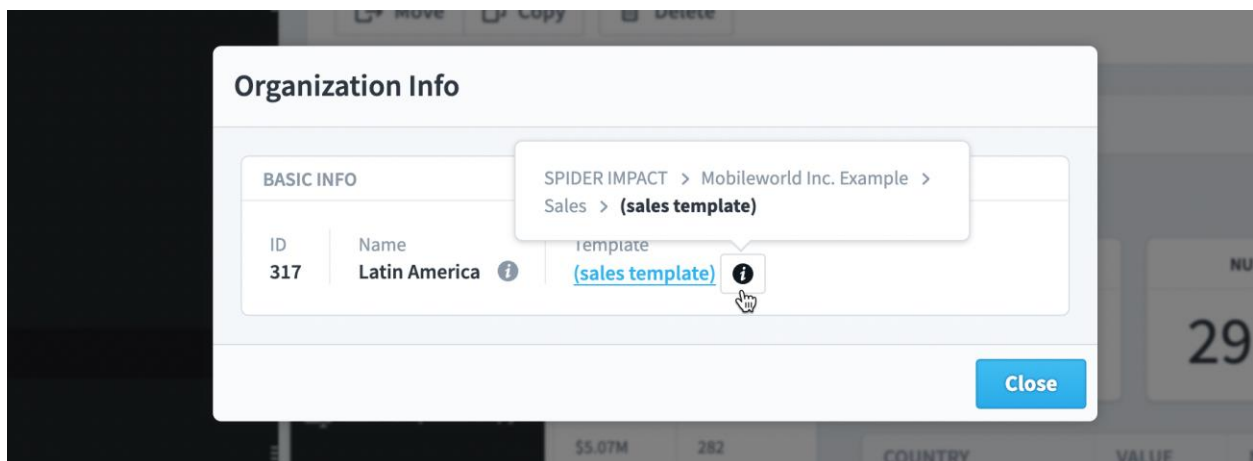
Organizations and Templates

New Organization Info dialog

There is a new menu option when editing organizations called Organization Info.



Clicking this opens a dialog showing information about the organization, including its name, ID, source template, templated copies, etc.

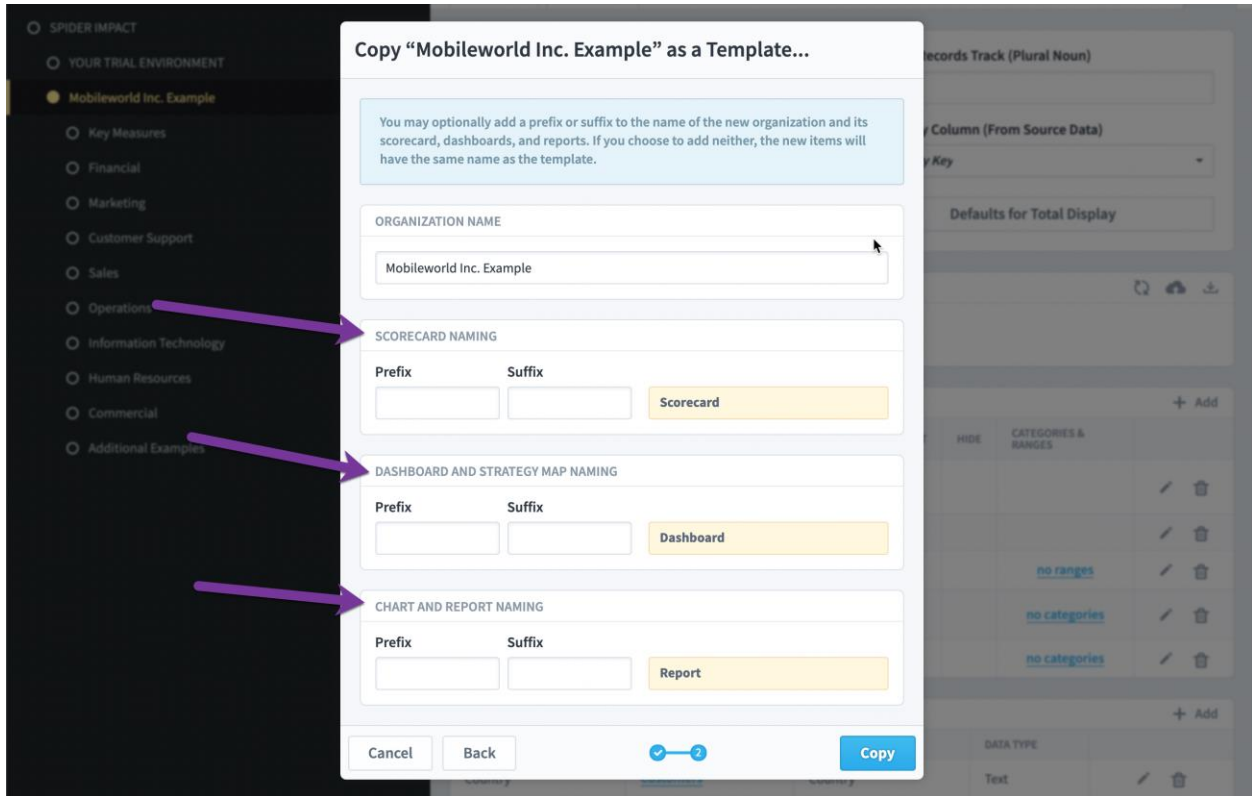


All new templates are for organizations

With the addition of the Charts section and full-featured support for Organization templating, all new templates must now be created at the Organization level. Existing item-level templates for Reports, Dashboards, and

Strategy Maps will continue to work, but you will not be able to create new item-level templates.

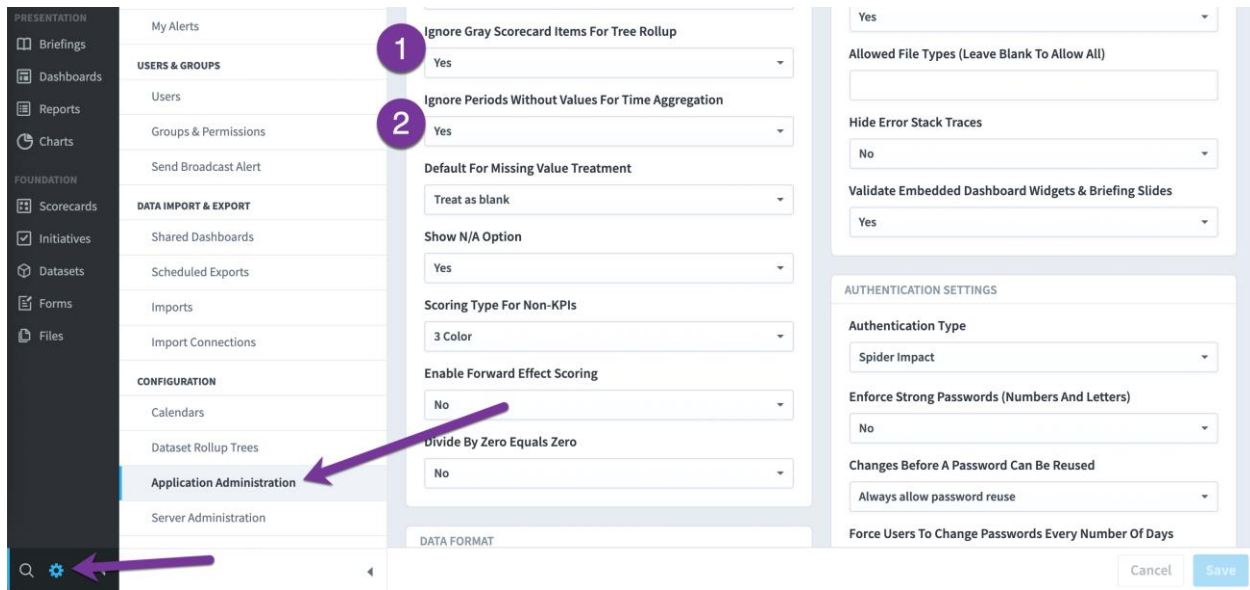
Organization-level templates can do everything item-level templates could do, and more. Organization-level templates also support more item types, including Scorecards, Dashboards, Strategy Maps, Charts, and Reports.



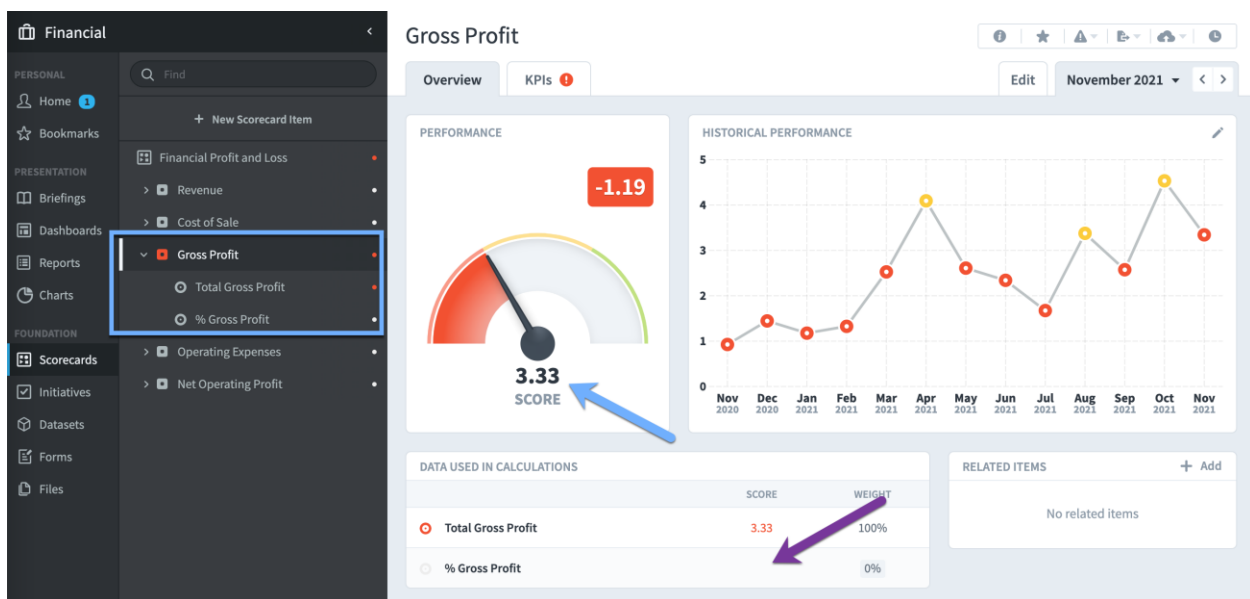
Administration

Configuration settings for missing values

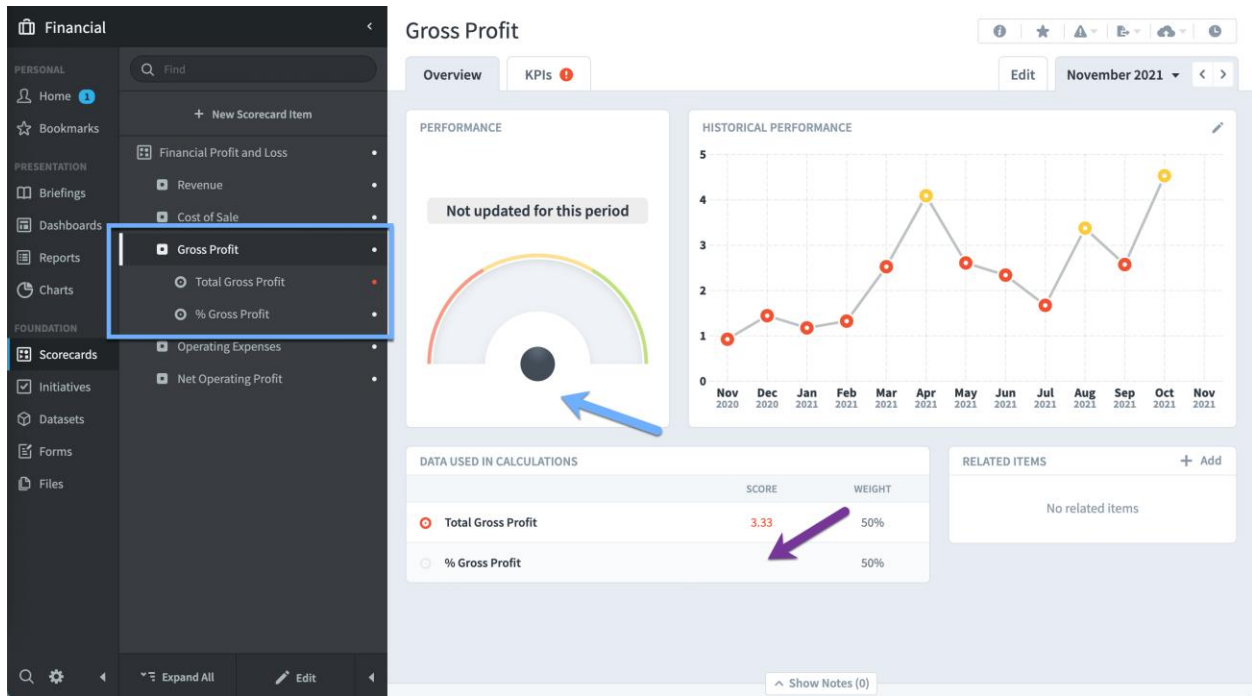
There are now two configuration options in the Administration section for choosing how you want to treat missing values.



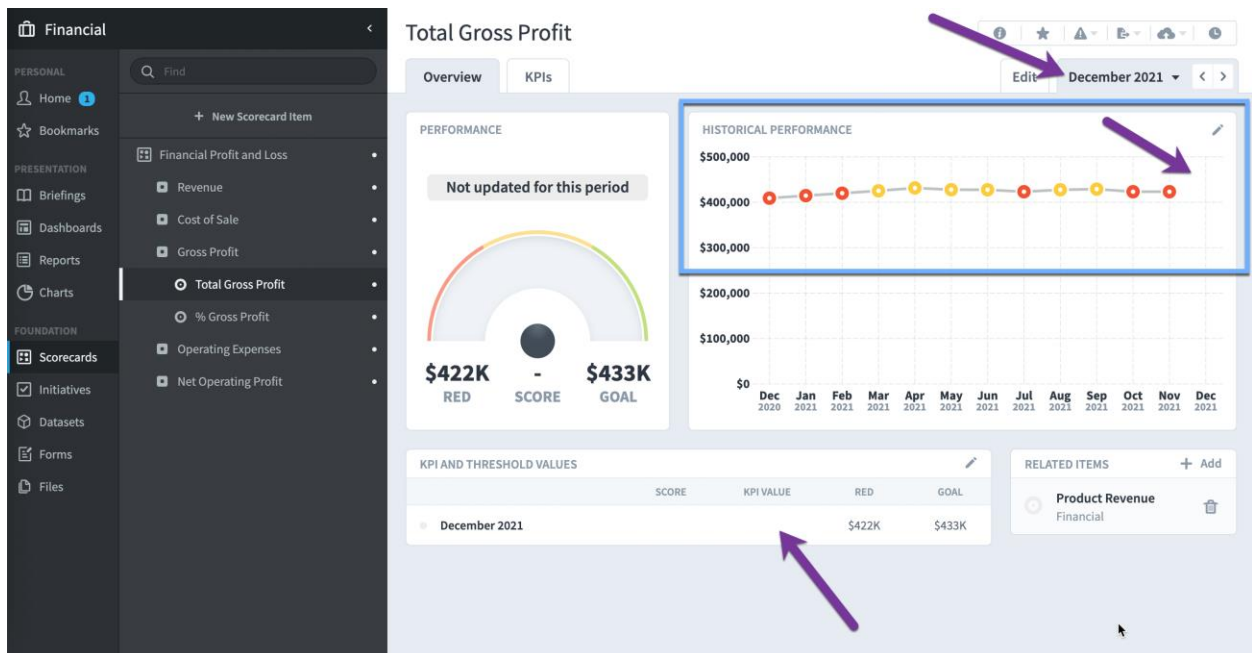
1. "Ignore Gray Scorecard Items For Tree Rollup" is for missing values when rolling scores up a scorecard tree. By default, missing values are ignored, which means that a parent will have a score if at least one of its children has a score.



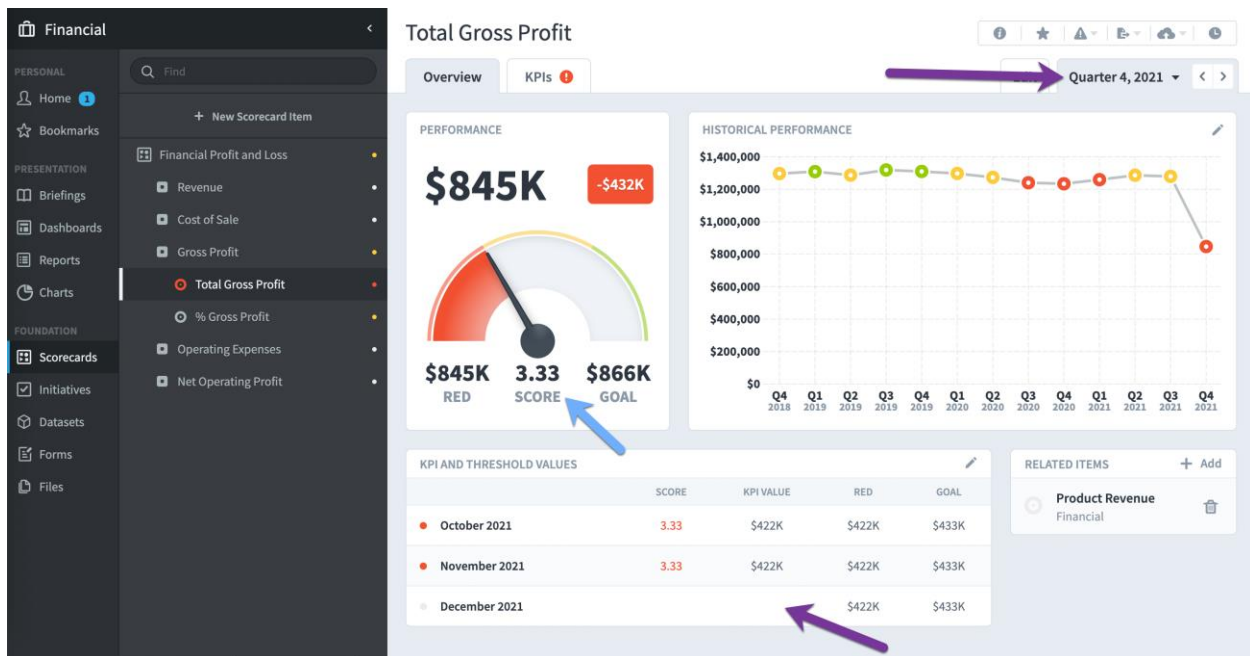
When "Ignore Gray Scorecard Items For Tree Rollup" is off, a single missing KPI value will cause everything in the tree above it to have no score.



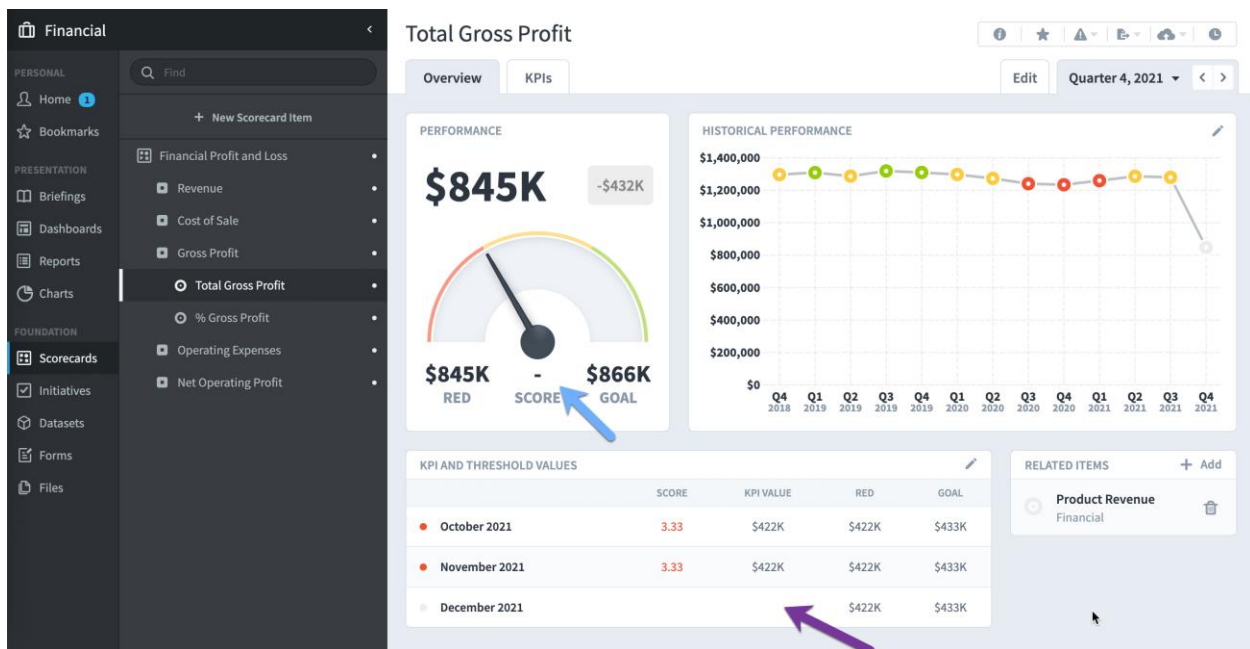
2. "Ignore Periods Without Values For Time Aggregation" is for missing values over time. By default missing values are ignored, so a larger period is scored even when not all of the smaller periods are complete. In this example the Total Gross Profit KPI does not yet have a value for December 2021.



When you change the calendar to Quarter 4, 2021, the Total Gross Profit KPI has a score for that quarter, even though one of the months in the quarter doesn't have a value.

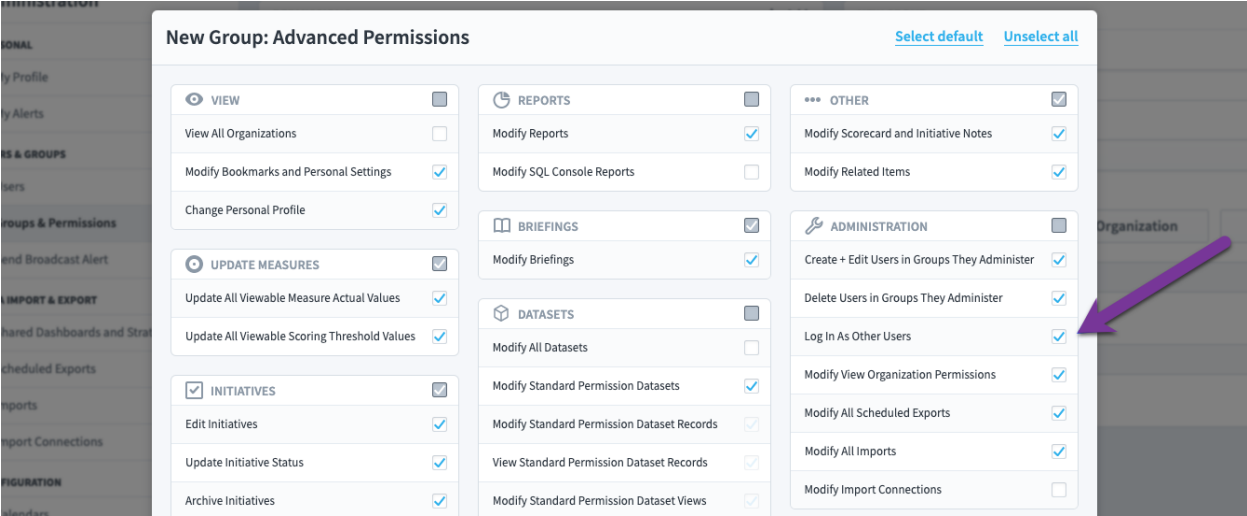


When "Ignore Periods Without Values For Time Aggregation" is off, Quarter 4, 2021 now has a blank score because not all of the months in the quarter have values.



New "log in as other users" permission

There's a new permission for Administrator groups called "log in as other users". This makes it more obvious who can log in as other users, and it allows large organizations to set up a more decentralized approach to user management.



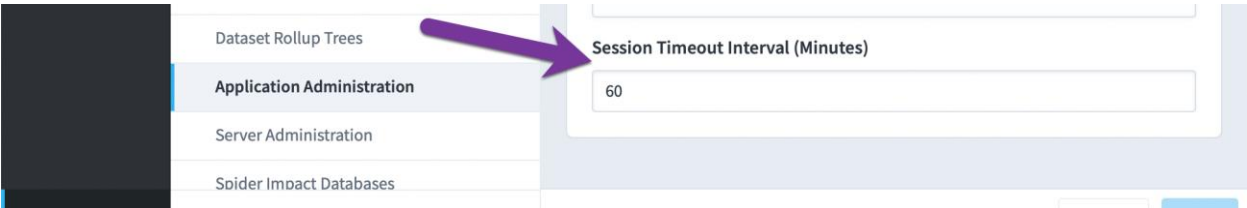
Users will be able to log in as other users if both criteria are met:

- 1. They are members of a group that has the "Log in as other users" permission.
- 2. They have the same or more permissions as the person they're logging in as, including viewable organizations, advanced group permission checkboxes, and dataset permissions.

In other words, logging in as another user will not allow you to see or do anything that you can't already see or do.

Setting logout time

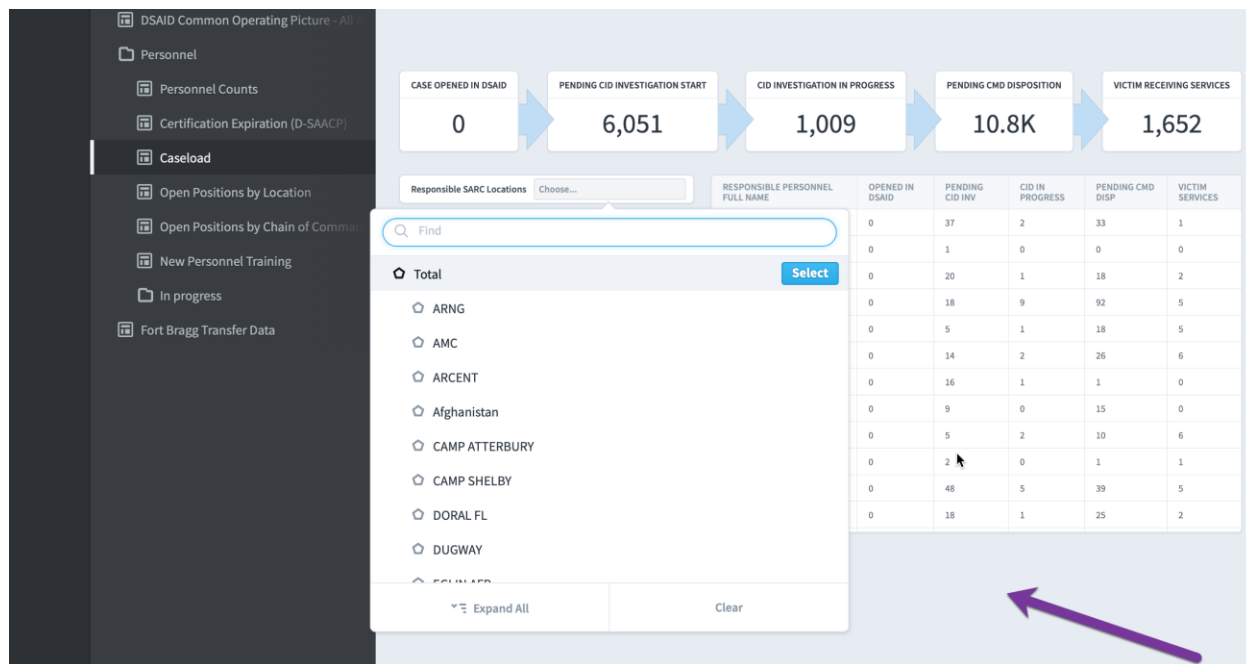
System administrators can now set the number of minutes of inactivity to automatically log users out of Impact.



Usability

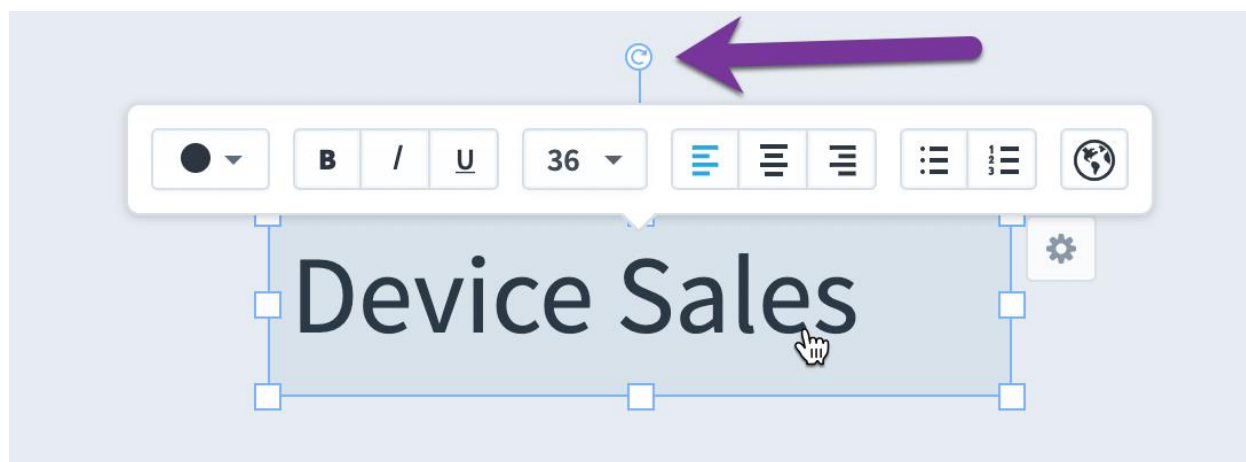
Closing open filter widget doesn't zoom

Users close open filter widgets by clicking on empty dashboard space. This action no longer zooms in on the dashboard.

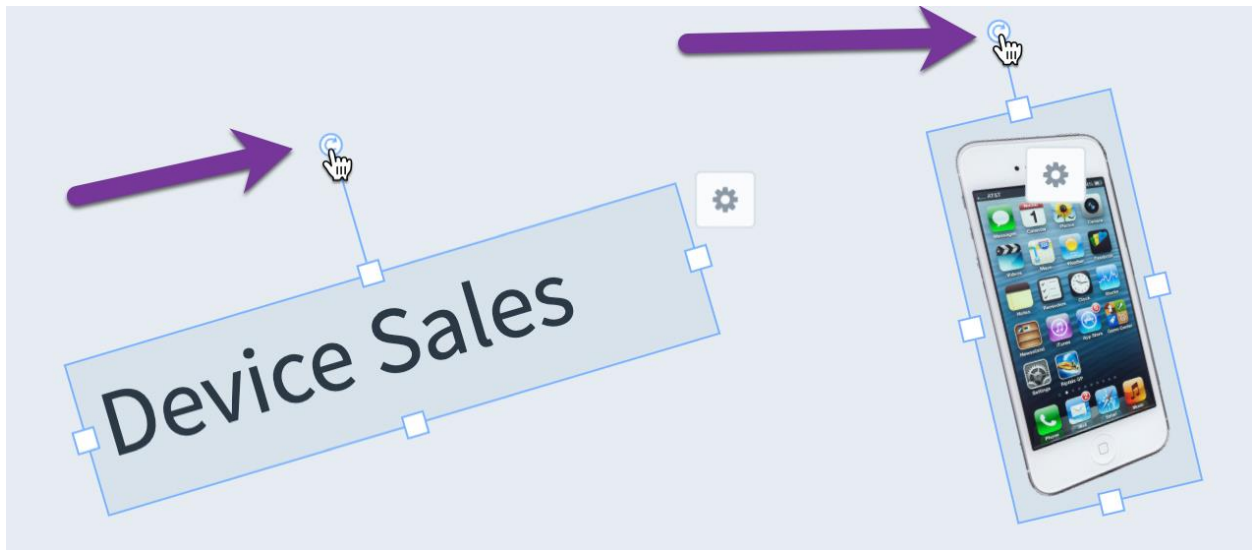


Dashboard widget rotation handle icon

There is now an icon inside of the rotation handle for text and image dashboard widgets.

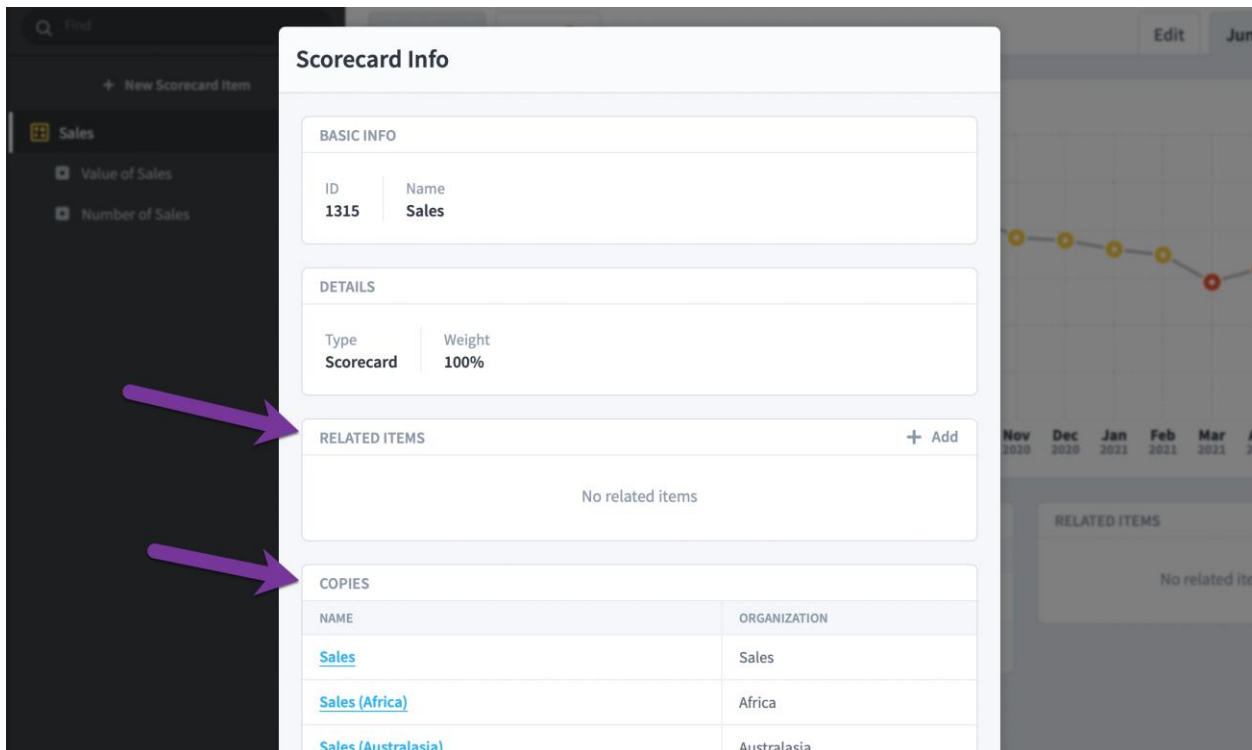


This makes it clearer what the rotation handle does.



Rearranged info dialogs

The list of templated copies can be quite long, so related items are now shown above them in info dialogs.

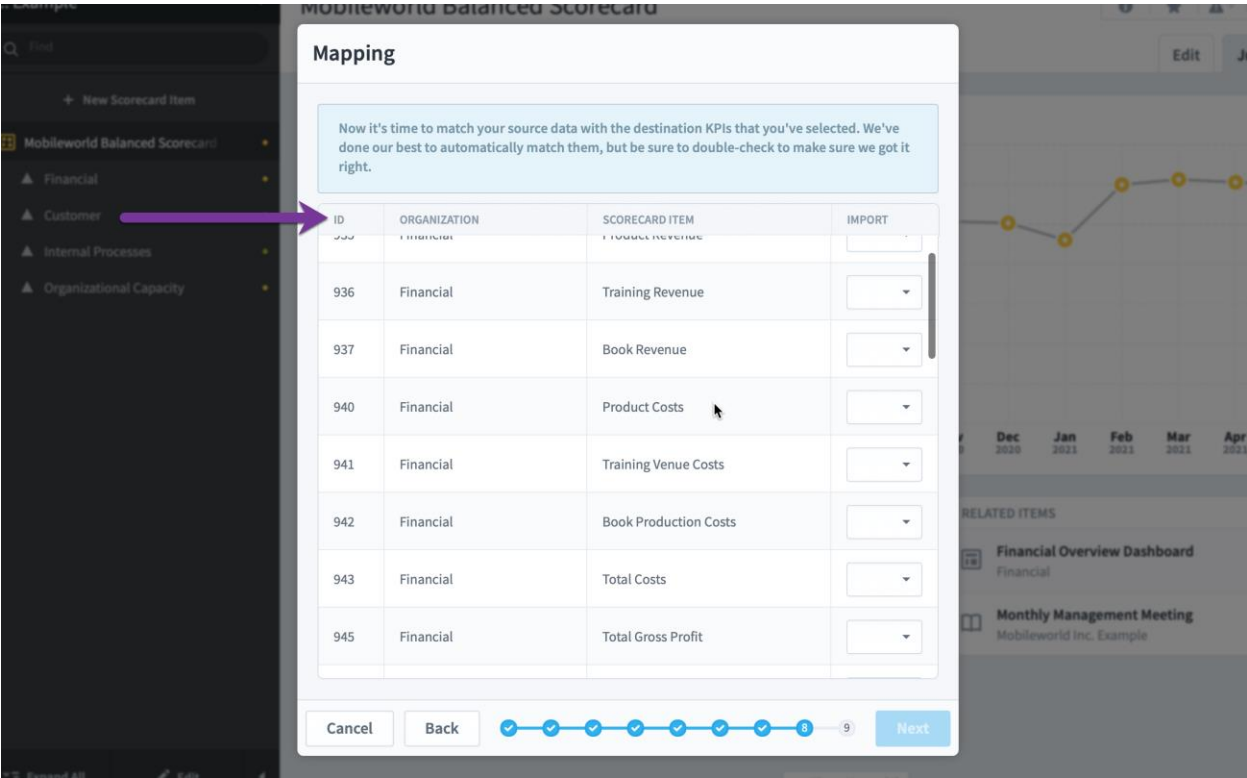


Better email alert subject lines

The subject lines on all emails have been rewritten to provide more information. Rather than just saying you've received an alert, they now tell you what kind of alert you've received.

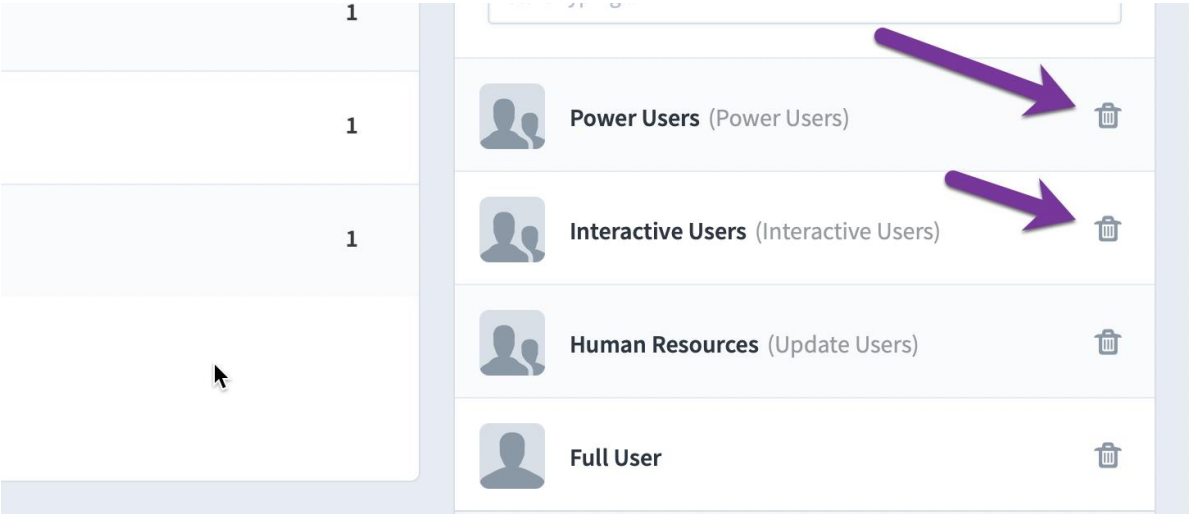
Mapping column headers locked while scrolling

The column headers are locked into place when scrolling on data import mapping.



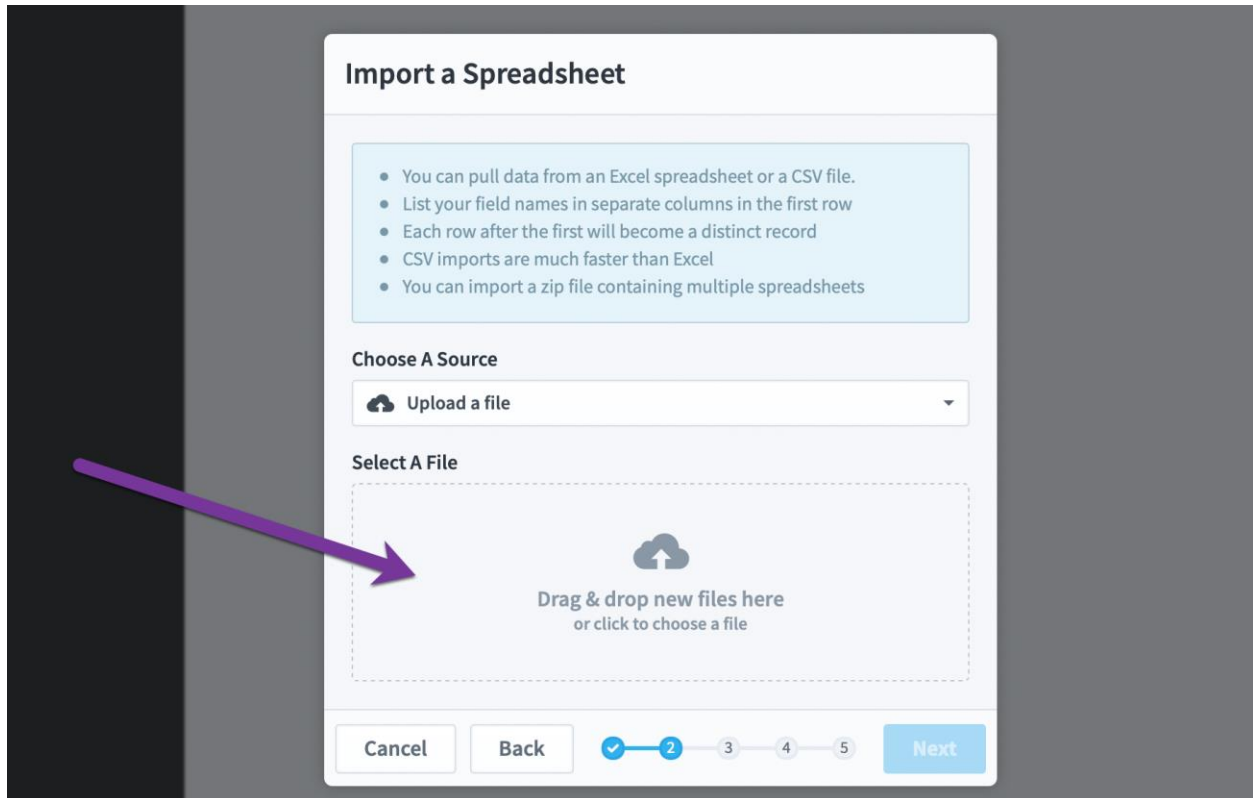
Show buttons without hover

All buttons and controls now show regardless of whether you're hovering your mouse over them. This increases usability by making all actions easier to discover.



New upload controls

There are new upload controls used throughout Impact that make it easier to choose a file. You can either drag a file into the window, or you can click on the box to open a file chooser.



Other

In addition to many bug fixes, there were several other notable enhancements in this release, including:

- Replace thumbs up/down icons
- Prevent missing X axis labels
- RMF Requirement: Show Successful Logout
- Update "powered by" text on login page
- Don't strip querystring off mailto links
- Slightly reduce the space above chart X axis labels
- Unify "actual value" language
- Add message explaining when only 100 users or groups are shown
- Change order of dashboard/chart colors
- Import notes column when dates are in header row
- Alert users of failed exports
- All FTP & Google Sheet imports now share the same UI
- Change message when only percent weightings need to be calculated
- Support for 2-digit years in date transformations
- Don't include the time and number of results in SQL reports
- Only folders have hover/active states in FTP list