

# DataServ Analytics Reference Manual

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## **Analytics Basics**

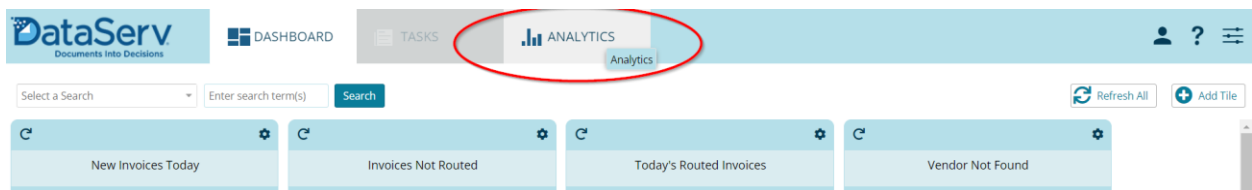
### **What is Analytics?**

The Analytics Dashboards allow you to quickly and cleanly see the data and metrics pertaining to your company's Accounts Payable health.

The Analytics tool delivers visibility into your financial liabilities and allows you to make better and faster decisions to manage invoices, processes, and vendors.

### **How Do I Access Analytics?**

You will access through the Analytics tab at the top of the Operational Dashboard.



### **How Do Users Get Access to Analytics?**

To give a user access to the Analytics tab, an Administrative User at your company will need to add the appropriate security group to the user's profile.

The Analytics security groups that are available:

- **P2P Analytics Viewer** - allows user to access Analytics tab and view all standard dashboards
- **P2P Analytics Designer** - along with access to the Analytics tab and all standard dashboards, also allows user to create & share new dashboards

A user can only be assigned **one** of these security groups.

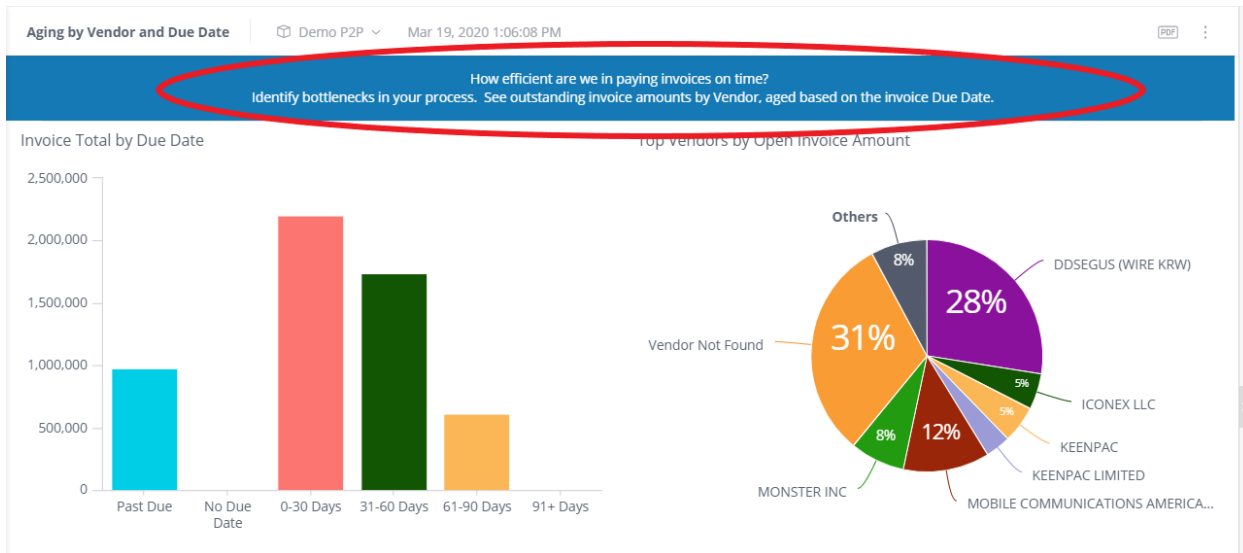
*Important Note: There is no field level security available in the Analytics tool. When a user is assigned access, they have access to all of the data in all of the fields.*

## **Analytics Dashboard**

### **What Is an Analytics Dashboard?**

An Analytics Dashboard is a collection of one or more widgets that visualize the selected data.

Each dashboard contains a description at the top that outlines what question the data on that dashboard intends to answer.



At the bottom of every standard dashboard, the background filters that are in place for that dashboard are listed. These indicate the data set that the dashboard starts with and cannot be changed on that standard dashboard.

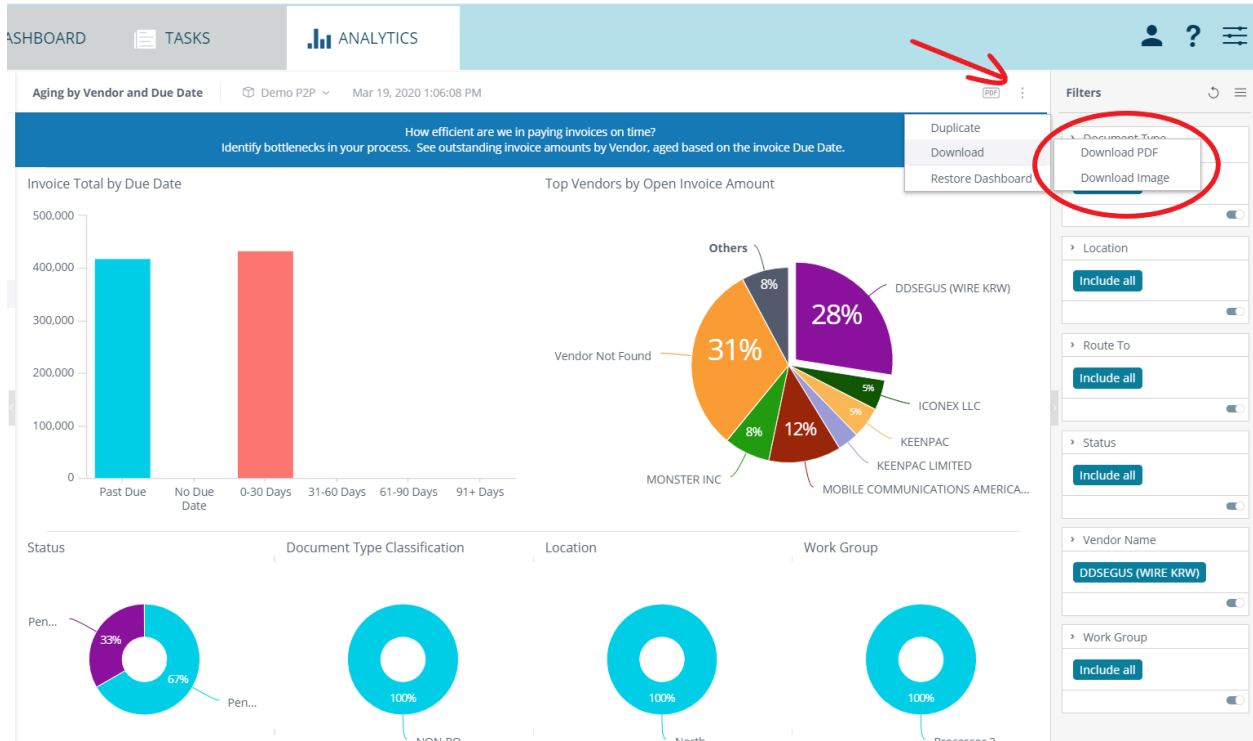
**Aging by Vendor and Due Date** Demo P2P Mar 19, 2020 1:06:08 PM

Invoice Number	PO Number	Invoice Date	Due Date	Vendor Name	Invoice Total	Status	Work Group	Location	Indexed Date	DIN
53347704	559102	2/2/20	5/23/20	GEORGIA-PA...	18,983.52	Pending App...	Processor 1	North	2/25/20	4021900000...
23898548	433787	2/20/20	4/18/20	APEX	2,558.67	Pending App...	Processor 1	North	3/6/20	4021900000...
70372623	472470	12/24/19	4/8/20	APEX	8,100.00	Pending App...	Processor 1	North	3/12/20	4021900000...
9403907633	883247	2/22/20	4/15/20	3M TJB8329	234.75	Pending App...	Processor 2	North	3/7/20	4021900000...
892849	180399	12/29/19	4/4/20	GENPAK	149.90	Pending App...	Processor 1	North	2/8/20	4021900000...
1816789	655180	1/23/20	5/18/20	CARLISLE FO...	1,515.90	Pending App...	Processor 1	North	2/13/20	4021900000...
89646941	431892	3/6/20	4/29/20	PROCESSOR ...	33.34	Pending App...	Processor 1	North	2/23/20	4021900000...
35772179	503745	2/1/20	4/7/20	SHIPPING C...	26.92	Pending App...	Processor 1	North	1/23/20	4021900000...
15617924	884152	12/31/19	4/29/20	TMR HOLDI...	7,498.10	Pending App...	Processor 2	North	1/16/20	4021900000...
42194687	763361	11/28/19	3/27/20	MONSTER INC	1,022.13	Pending App...	Processor 1	North	2/21/20	4021900000...
42194765	763733	12/21/19	3/24/20	MONSTER INC	58.90	Pending App...	Processor 1	North	3/9/20	4021900000...
29451147	432787	1/9/20	5/19/20	BUNZLETAIL ...	16.48	Pending App...	Processor 1	North	2/10/20	4021900000...
7610339700	326029	1/29/20	3/15/20	DUPONT TY...	-486.28	Pending App...	Processor 1	North	2/22/20	4021900000...
90114255	440585	2/12/20	5/22/20	BUCKEYE IN...	30,819.00	Pending App...	Processor 1	North	1/1/20	4021900000...
71412326-0...	881699	11/29/19	3/8/20	ANOR DONN...	2,362.50	Pending App...	Processor 2	North	12/25/19	4021900000...
827531	1111111111	2/20/20	4/30/20	PROFESSION...	-5,670.00	Pending App...	Processor 2	North	2/9/20	4021900000...
827532	846105	1/29/20	4/23/20	PROFESSION...	-6,615.00	Pending App...	Processor 2	North	3/12/20	4021900000...
49199974	846533	1/9/20	4/12/20	STAPLES AD...	-106.46	Pending App...	Processor 2	North	3/2/20	4021900001...
49272490	846533	2/16/20	6/7/20	STAPLES AD...	-243.47	Pending App...	Processor 2	North	3/11/20	4021900001...
49333292	846533	2/11/20	4/28/20	STAPLES AD...	-256.28	Pending App...	Processor 2	North	1/8/20	4021900001...
88885	763621	2/10/20	5/21/20	WESTERN PL...	851.66	Pending App...	Processor 1	North	2/28/20	4021900001...
178528	310498	2/7/20	5/11/20	MAX PACKA...	1,108.00	Pending App...	Processor 1	North	3/7/20	4021900001...

Background Filters: Status is not Complete, Duplicate/Void, Non-Invoice, Paid, or PT Complete. Document Type = Invoice.

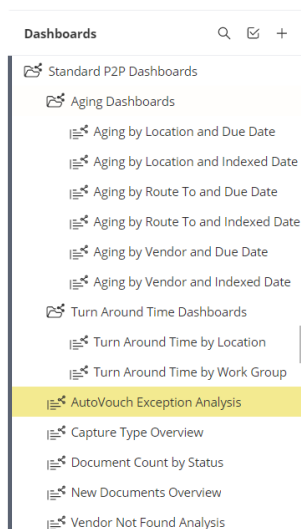
## How to Download Dashboards

You are able to export the entire dashboard to a PDF or download an image of the dashboard.



## Standard AP Dashboards

Every user with access to the Analytics tab has access to all of the standard dashboards. The data in these dashboards updates nightly and is intended to give insight into your company's historical trends.



## **Aging Dashboards**

### **Aging by Location and Due Date**

How efficient are you paying invoices on time?

See outstanding invoice amount by Location, aged based on invoice due date.

### **Aging by Location and Indexed Date**

How long have invoices been in process?

See outstanding invoice amounts by Location, aged based on the date the document was imported into DataServ.

### **Aging by Route To and Due Date**

How efficient are you in paying invoices on time?

See outstanding invoice amounts by Route To person, aged based on invoice due date.

### **Aging by Route To and Indexed Date**

How long have invoices been in process?

See outstanding invoice amounts based on Route To person, aged based on the date the document was imported into DataServ.

### **Aging by Vendor and Due Date**

How efficient are you in paying invoices on time?

See outstanding invoice amounts by Vendor, aged based on the invoice due date.

### **Aging by Vendor and Indexed Date**

How long have invoices been in process?

See outstanding invoice amounts by Vendor, aged based on the date the document was imported into DataServ.

## **Turn Around Time Dashboards**

### **Turn Around Time by Location**

How quickly are you completing invoices by Location?

Identify hold-ups in your process.

### **Turn Around Time by Work Group**

How quickly are we completing invoices by Work Group?

Pin-point bottlenecks in your process.

### **AutoVouch Exception Analysis**

What exceptions are causing invoices to not AutoVouch successfully?

Drill into your AutoVouch exceptions to identify patterns with exception reasons and specific vendors.

### **Capture Type Overview**

How well are vendors contributing to your paperless initiative?

Identify opportunities to convert to electronic invoice submission.

### **Document Count by Status**

How efficient are you at processing your invoices?

See the breakdown of invoices recently received and their status as of the last data refresh.

### **New Documents Overview**

How does your invoice volume ebb and flow?

See trends over time for volume peaks and valleys.

### **Vendor Not Found Analysis**

How can you reduce problems with vendor identification?

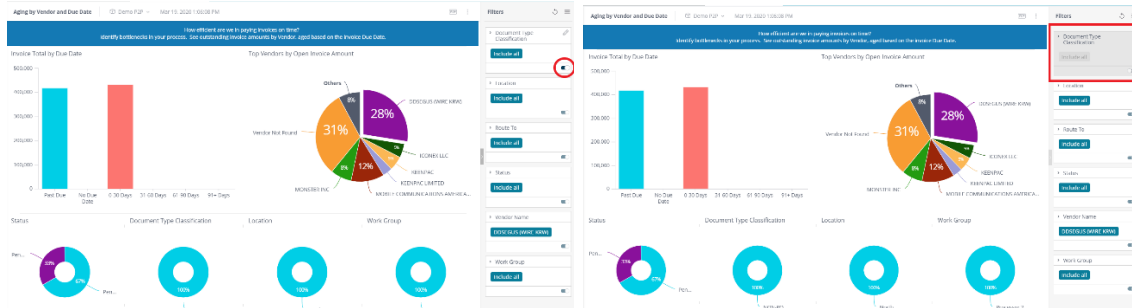
Identify Vendor Not Found trends to pinpoint vendor master or vendor invoices problems to correct.

## Filters

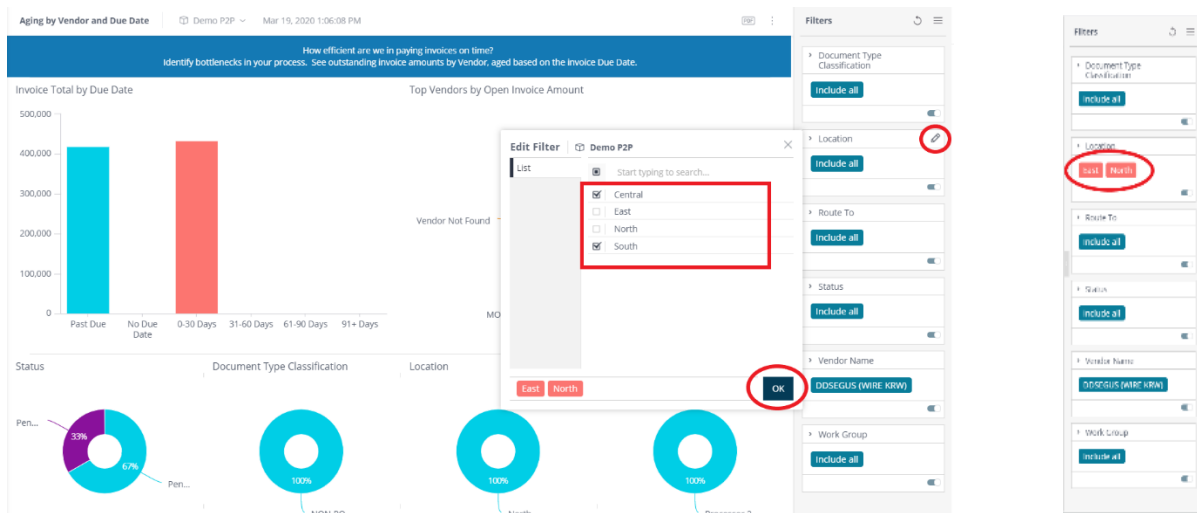
### Modify Filters

You can disable or exclude filters within an existing dashboard in the filter menu on the right side of the screen.

To disable a filter, click on the disable button in the lower right corner of the filter. The filter will be grayed out when disabled.



To exclude a filter, click the pencil icon, select the filter options you would like to remove, and click "OK."

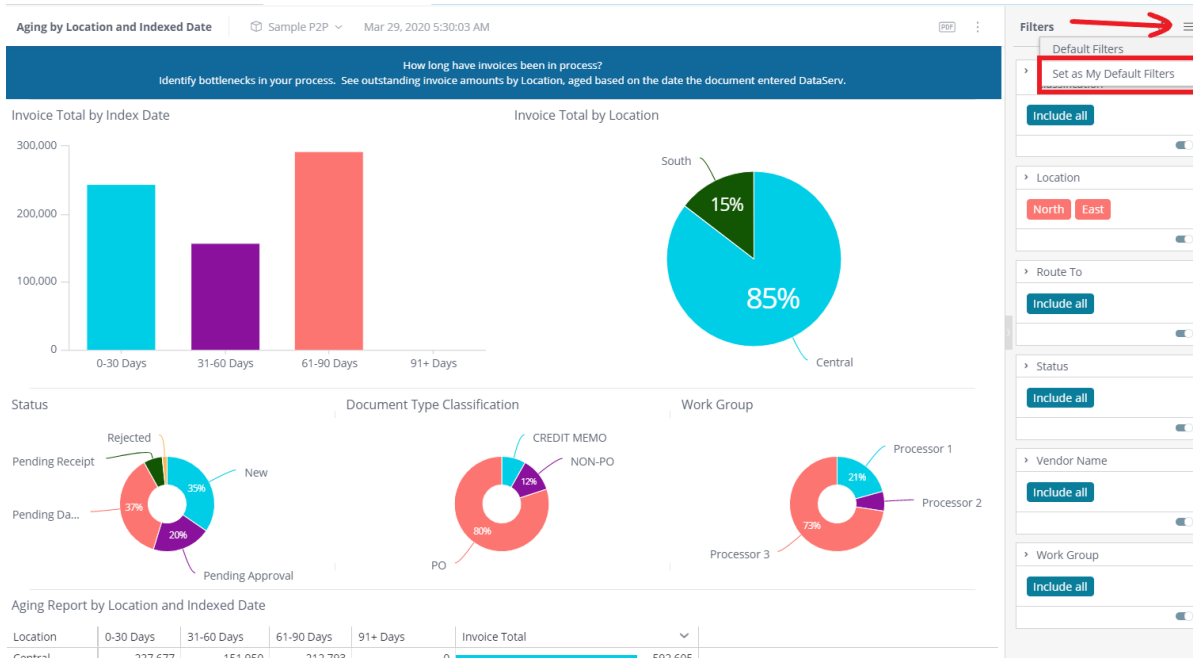


If a filter displays in red, it means that filter is excluded from that dashboard.

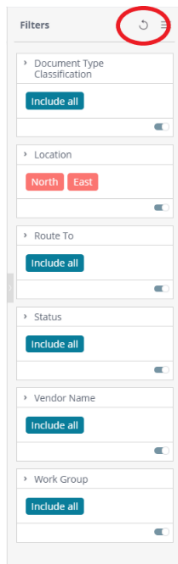
### Set Default Filters

You can determine your own default filters for any dashboard and set those in the filters section on the right side of the screen.

For example, if you'd like the dashboard to default to a specific location, you will modify that filter, and then select "Set as My Default Filters."



Once those defaults are set, if you modify any filters, you can always restore your defaults by clicking the circle icon here.

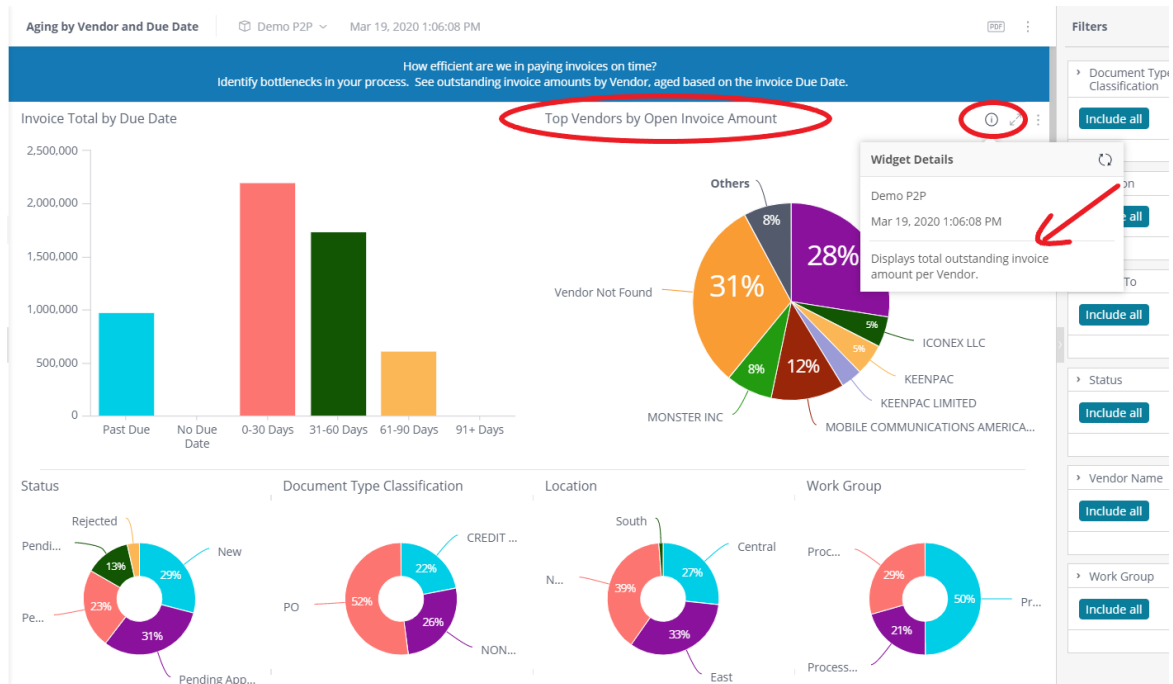




## Widgets

Each individual section of the Dashboard is called a Widget. Widgets are a mini-report that can display your data in a number of presentation styles, including simple numeric metrics, tables and charts.

Hover over or click on the information icon for a description of any widget.



Within each widget, you can download or print, or pop out the individual widget to a full screen view.

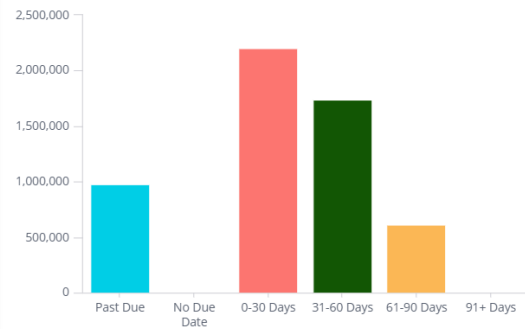
### Filter Within a Widget

Hover over any individual section within the widget to see a summary of the data in that section or click on that portion of the graph to filter down into the details of that section. This will cause the entire dashboard to update to reflect the details related to that specific data segment.

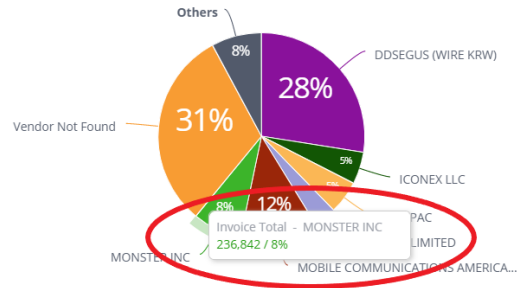
For example, to see the details related to the Monster Inc invoices, click that section of the graph, and the entire dashboard updates to show those details. Click "Clear Selection" in the upper right to restore the default filters on the dashboard.

How efficient are we in paying invoices on time? Identify bottlenecks in your process. See outstanding invoice amounts by Vendor, aged based on the invoice Due Date.

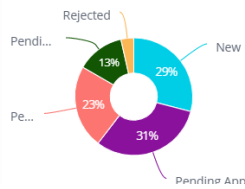
Invoice Total by Due Date



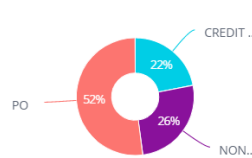
Top Vendors by Open Invoice Amount



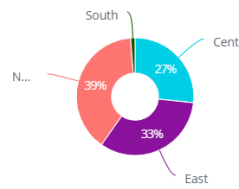
Status



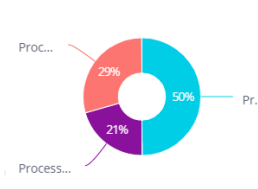
Document Type Classification



Location

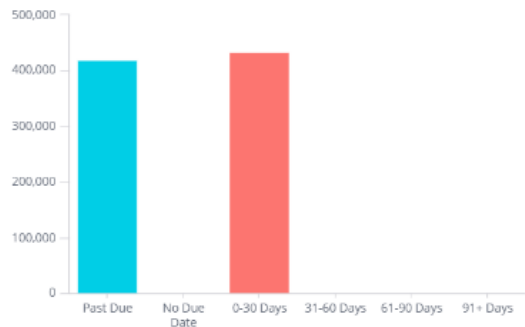


Work Group

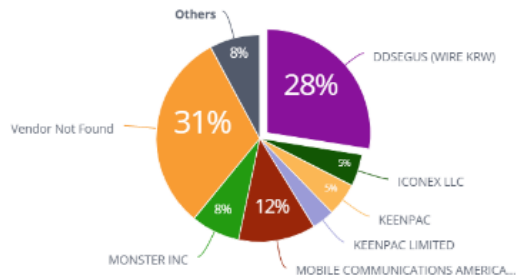


How efficient are we in paying invoices on time? Identify bottlenecks in your process. See outstanding invoice amounts by Vendor, aged based on the invoice Due Date.

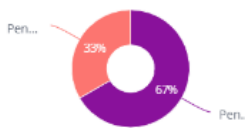
Invoice Total by Due Date



Top Vendors by Open Invoice Amount



Status



Document Type Classification



Location



Work Group



## Create Your Own Dashboard

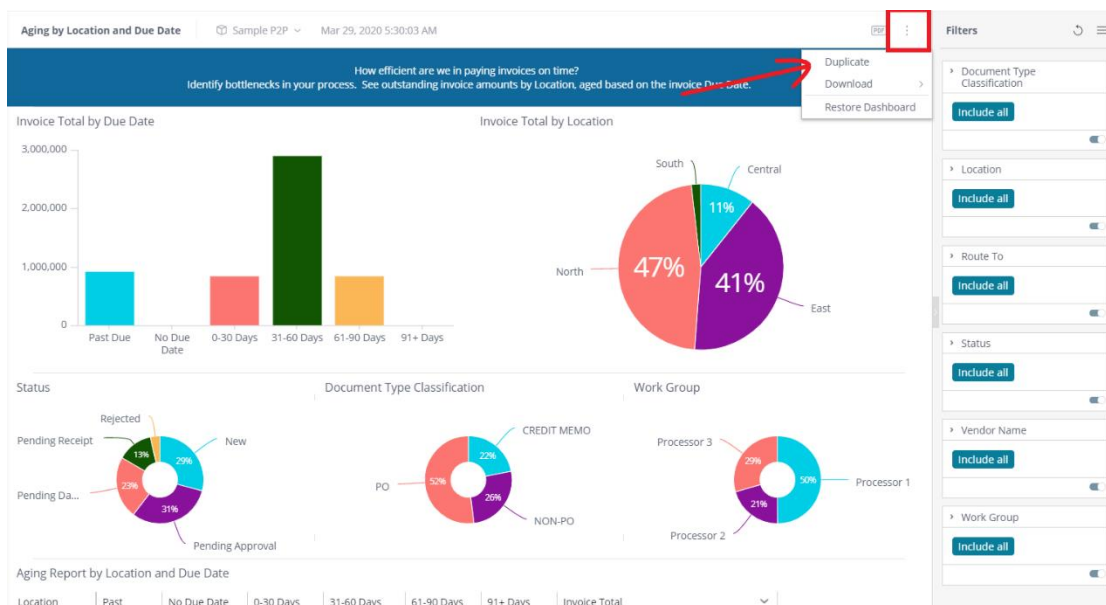
With Analytics Designer security, you have the ability to create your own Analytics Dashboards. You can define which widgets appear in the dashboard, their design, how they are organized and the filtering of data that appears.

We recommend duplicating an existing dashboard and modifying the filters when creating your own dashboard, but you can also create your own.

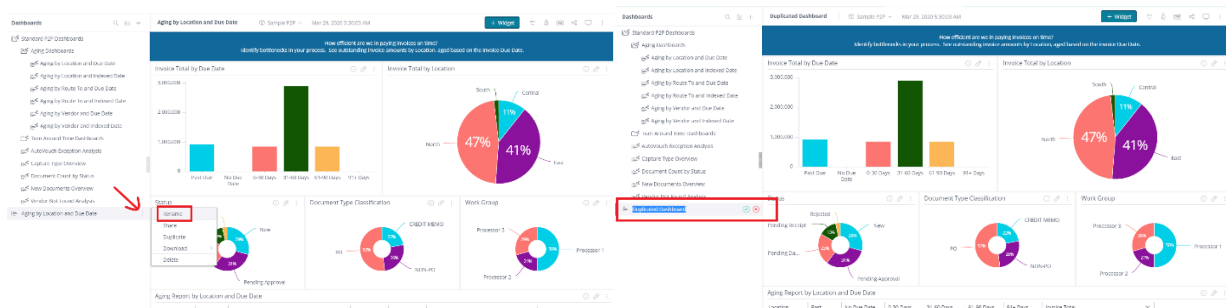
DataServ allows you to create as many Analytics Dashboards as you need, and they can be shared with others.

## Duplicate an Existing Dashboard

Open the dashboard you'd like to duplicate, click on the options icon in the upper right, and select "Duplicate."



Rename the duplicate dashboard by clicking the options menu next to the title, type in the new name, and click the green check mark icon to save.



Modify or delete any of the existing filters on the right side of the screen in the filters section.

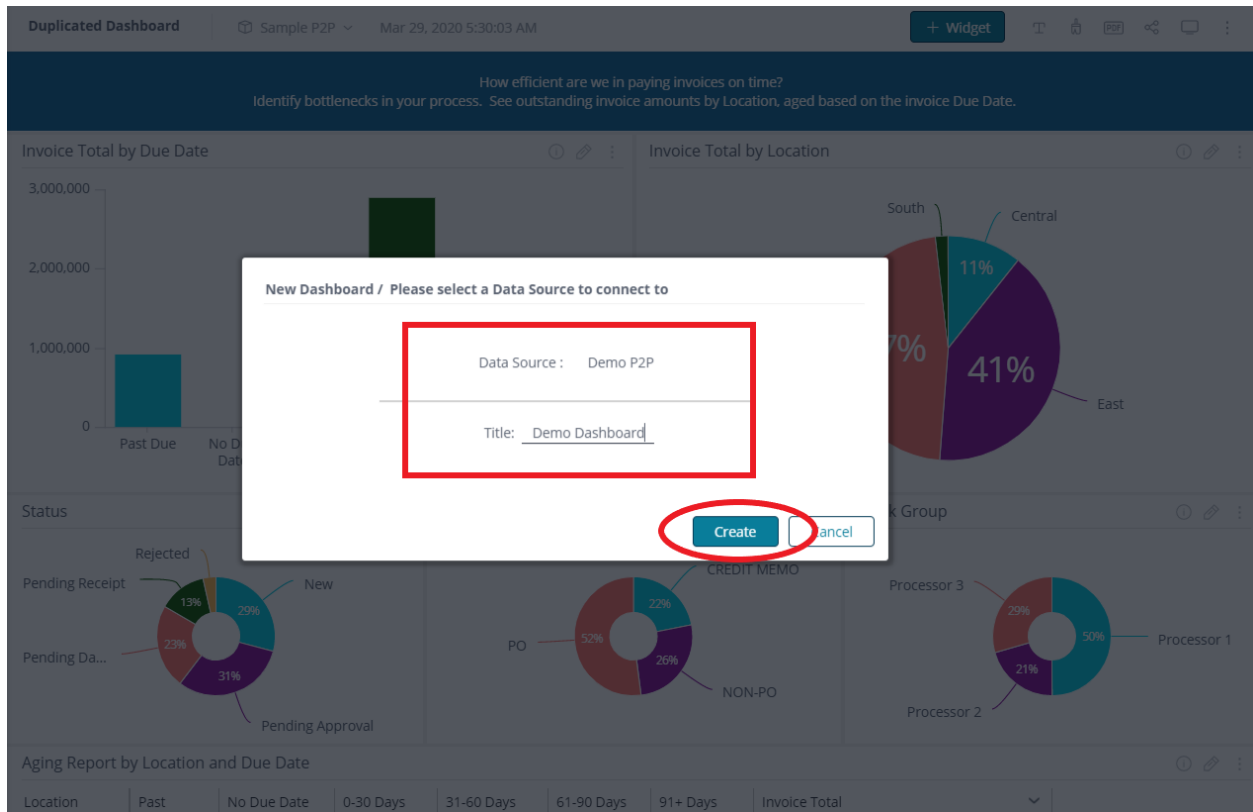
Add a new filter by clicking the plus sign icon and selecting the filter options.

The screenshot shows a dashboard titled 'Sample P2P' with a date of 'Mar 29, 2020 5:30:03 AM'. A red arrow points to a plus sign icon in the top right corner of the dashboard area. Another red arrow points to the 'Add Filter' dialog box, which is open and shows a search bar and a list of filter options. The 'Completed By' filter is highlighted in yellow. The dashboard itself contains several charts: a bar chart 'Invoice Total by Due Date' showing values for 'Past Due', 'No Due Date', '0-30 Days', '31-60 Days', '61-90 Days', and '91+ Days'; a status pie chart with categories 'Rejected', 'New', 'Pending Receipt', 'Pending Da...', and 'Pending Approval'; and a document type classification pie chart with categories 'CREDIT MEMO', 'NON-PO', and 'PO'. A filters sidebar on the right lists various filter categories like 'Document Type Classification', 'Location', 'Route To', 'Status', 'Vendor Name', and 'Work Group', each with an 'Include all' button.

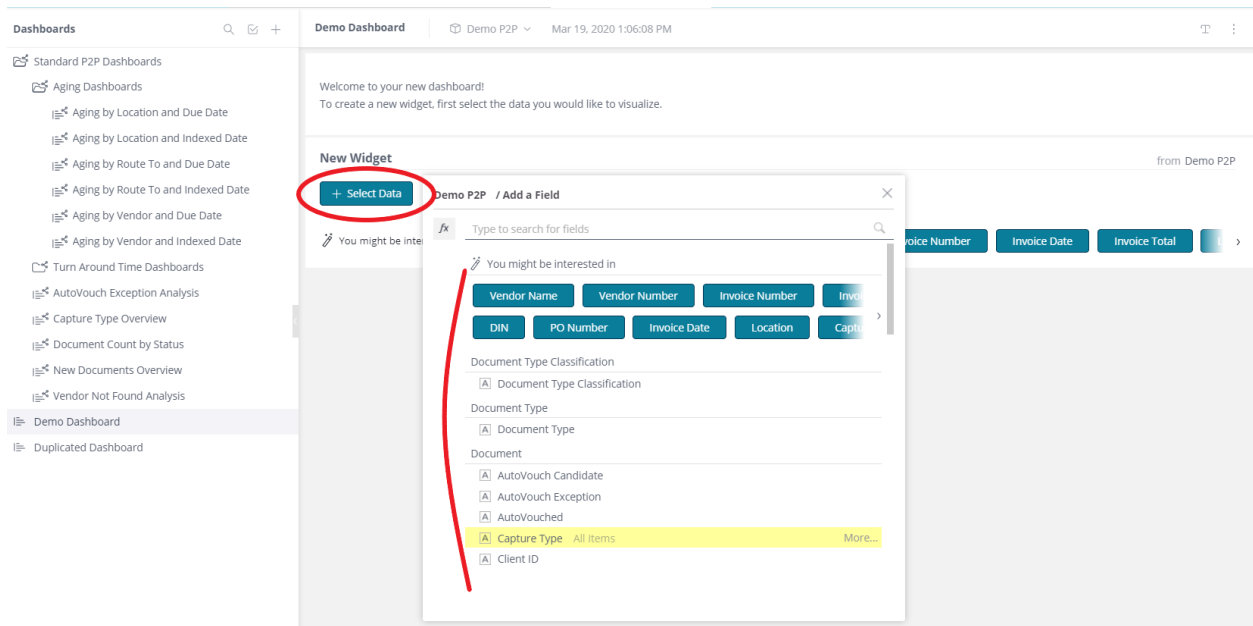
## Create New Dashboard

Click the plus sign icon above the list of standard dashboards, then select your data source and title for the dashboard.

The screenshot shows the 'DataSery' dashboard creation interface. A red arrow points to a plus sign icon above the list of standard dashboards. A 'New Dashboard' dialog box is open, showing options for 'New Folder' and 'New Folder'. The background shows a preview of a dashboard with various charts: a bar chart 'Invoice Total by Due Date', a pie chart 'Invoice Total by Location' with categories 'North', 'South', 'Central', and 'East', a status pie chart, a document type classification pie chart, and a work group pie chart. The dashboard also includes an 'Aging Report by Location and Due Date' table with columns for 'Location', 'Past', 'No Due Date', '0-30 Days', '31-60 Days', '61-90 Days', '91+ Days', and 'Invoice Total'.



Then select the fields to create the widgets within the dashboard.

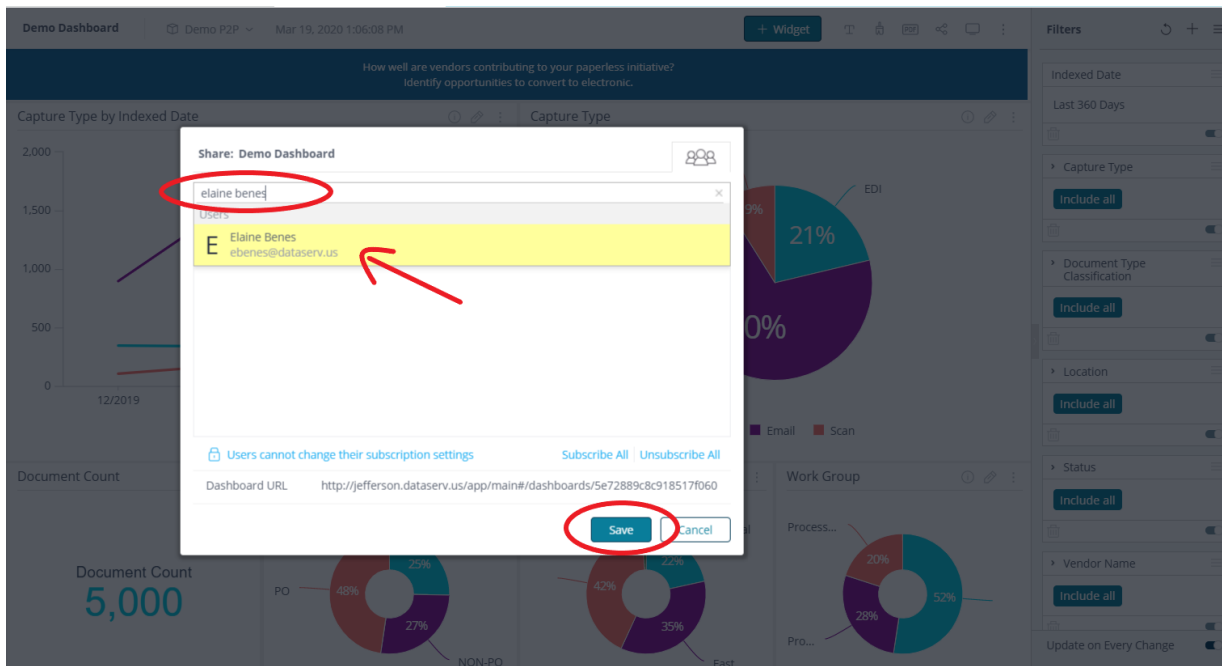
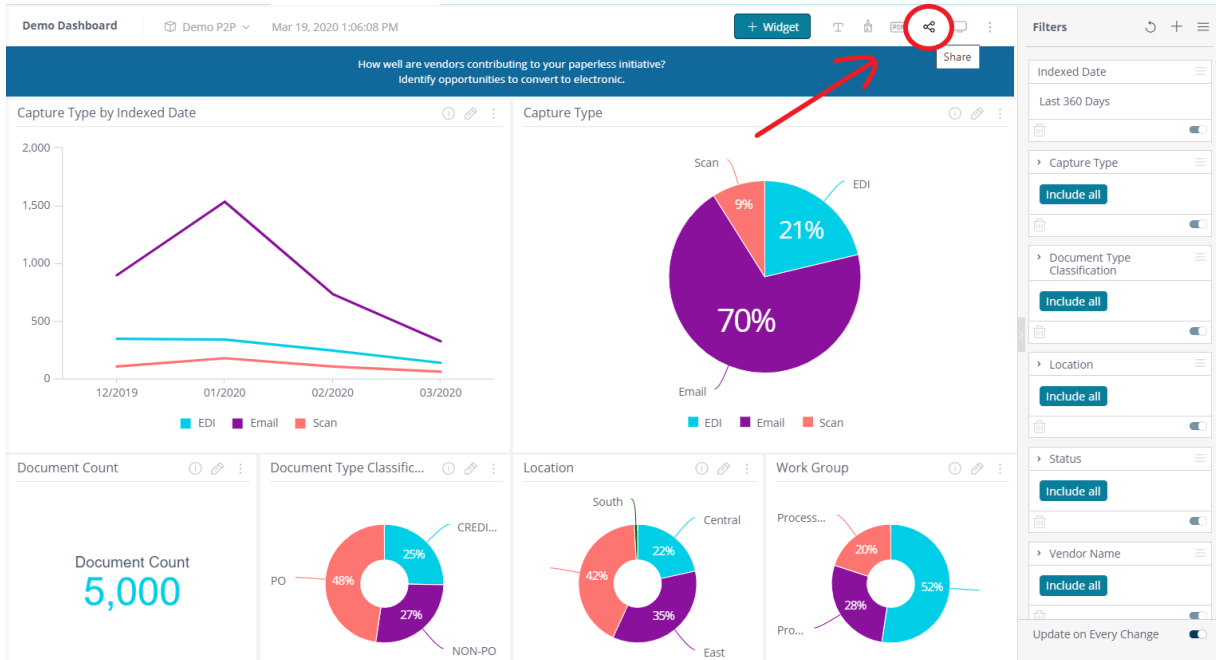


For more detailed instructions on creating your own dashboard, you can download the [Analytics Help Guide](#).

## Share a Dashboard

You can share any dashboard you create, whether it's a duplicated dashboard or a new dashboard.

To share, click the share icon in the upper right of the dashboard.



Type in the name of the person you want to share with, select that person, and click "Save."

# How to Search for Analytics Dashboard

If you have a large number of dashboards, you can search for a specific dashboard by typing the title in the Search field. As you begin typing, any relevant results are displayed.

