

Smoke Jumpers XVI

Next Generation Analytics

October 2017



Today's Topics



Enhanced FORGE Analytics Portal

- Main Goal = Ease of Use
- Newest Release/Patch
- Accessibility
- Intuitive Design
 - Centralized Report Location
 - Dynamic Searching
 - Simplified User Account Options
 - Streamlined Export/Scheduling

New Analytics Report Package

- Standard Layout
- Prompt(s)
- Interactive
- Visualization(s)
- Interactive Dashboards

Continued Heavy Investment

- Interactive Dashboard(s)
- Collaboration with consulting partners
- Collaboration with clients

Deployment Timing



Deployment Timing



Enhanced FORGE Analytics Portal & New Standard Report Deployment

- Begin deploying to clients subscribed to FORGE Analytics early in 2018
- Complete Deployment by July 2018
- Provide an estimated deployment week/month for each of our clients in December 2017.

Current State Analytics



Current State – Launch Pad



Welcome: **Administrator** | Applications ▾ Preferences Help menu ▾ | Log off

Home Documents

- My Recently Viewed Documents**
 - 1. Sales Analysis Dashboard
 - 6. Street Chain Review
 - 4. Margin Analysis Package
 - Ret 4. Retail: Distributor P&L
 - 5. Analysis - Spending by Componenti...
 - Ret 3. Retail Margin Analysis Package...
 - Ret 2. Retail Analysis Package
 - 3. Allowance Benchmarking Analysis
 - Ret 1. Planning Calendar and Volume...
 - 2. GPO Analysis Package
- My Recently Run Documents**
 - Casting Director
 - Casting Director
 - Casting Director
 - Casting Director
 - Casting Director
 - Casting Director
 - Casting Director
 - Casting Director
 - Casting Director
 - Casting Director
- 0 unread messages in My Inbox**

No unread messages

[See more...](#)
- 10 or more Unread Alerts**
 - ANALYTICS01.APS.WebIDSLBridge V...
 - ANALYTICS01.APS.Visualization Wat...
 - ANALYTICS01.APS.WebI Watch Caut...
 - ANALYTICS01.APS.Search Watch Ca...
 - ANALYTICS01.APS.Auditing Watch C...
 - Core Services Watch Caution Event
 - ANALYTICS01.APS.Search Watch Ca...
 - Lumira Server Services Watch Dange...
 - Lifecycle Management Services Watc...
 - Core Services Watch Caution Event

[See more...](#)
- My Applications**
 - Microsoft Office Word
 - Microsoft Office Excel
 - Microsoft Office PowerPoint
 - Microsoft Office OneNote
 - Microsoft Office Outlook
 - Microsoft Office Access
 - Microsoft Office Publisher
 - Microsoft Office Visio
 - Microsoft Office Project
 - Microsoft Office SharePoint Designer
 - Microsoft Office InfoPath
 - Microsoft Office Word 2010
 - Microsoft Office Excel 2010
 - Microsoft Office PowerPoint 2010
 - Microsoft Office OneNote 2010
 - Microsoft Office Outlook 2010
 - Microsoft Office Access 2010
 - Microsoft Office Publisher 2010
 - Microsoft Office Visio 2010
 - Microsoft Office Project 2010
 - Microsoft Office SharePoint Designer 2010
 - Microsoft Office InfoPath 2010

Current State – Report Location(s)



My Documents:

The 'My Favorites' & 'Inbox' are found within the 'My Documents' Drawer

The screenshot shows a software interface with a 'Documents' tab selected. Below the tab is a menu bar with 'View', 'New', 'Organize', 'Send', 'More Actions', and 'Details'. The main area is divided into two panes. The left pane, titled 'My Documents', shows a tree view with 'My Favorites' (highlighted), '~WebIntelligence', 'Inbox' (highlighted), 'My Alerts', and 'Subscribed Alerts'. The right pane, titled 'Title', shows a list of files and folders:

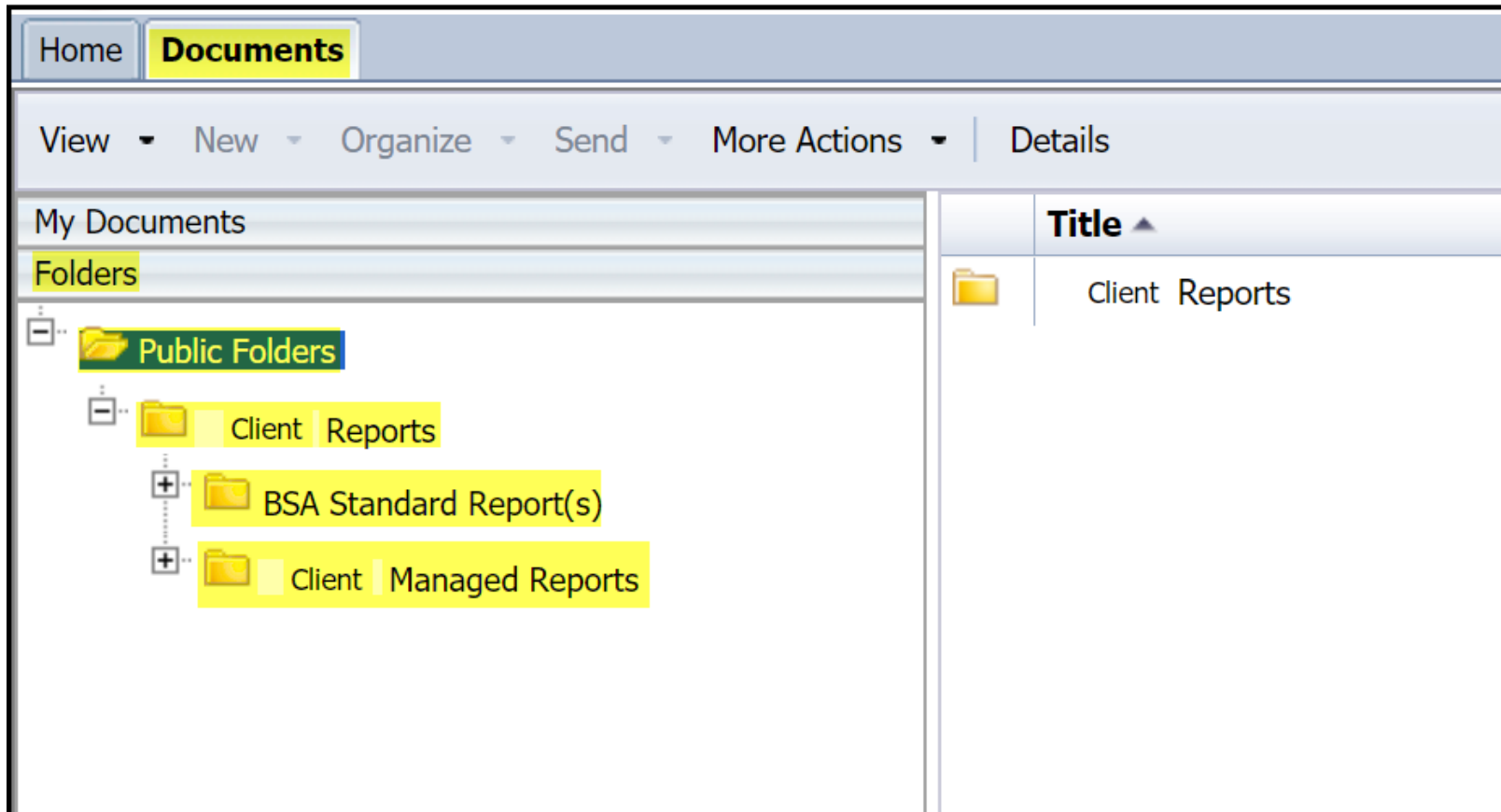
Title ▲	
~WebIntelligence	Folder icon
ANA - GPO Analysis Package	Document icon with red dot
Analysis - Approved Margin Analysis Package - All	Document icon with red dot
Analysis - Current Margin Analysis Package - All	Document icon with red dot
Analysis, Margin (P&L) By Division	Document icon with red dot

Current State – Report Location(s)



Folders:

The 'BSA Standard' & 'Client Managed' Reports are found within the 'Folders' Drawer

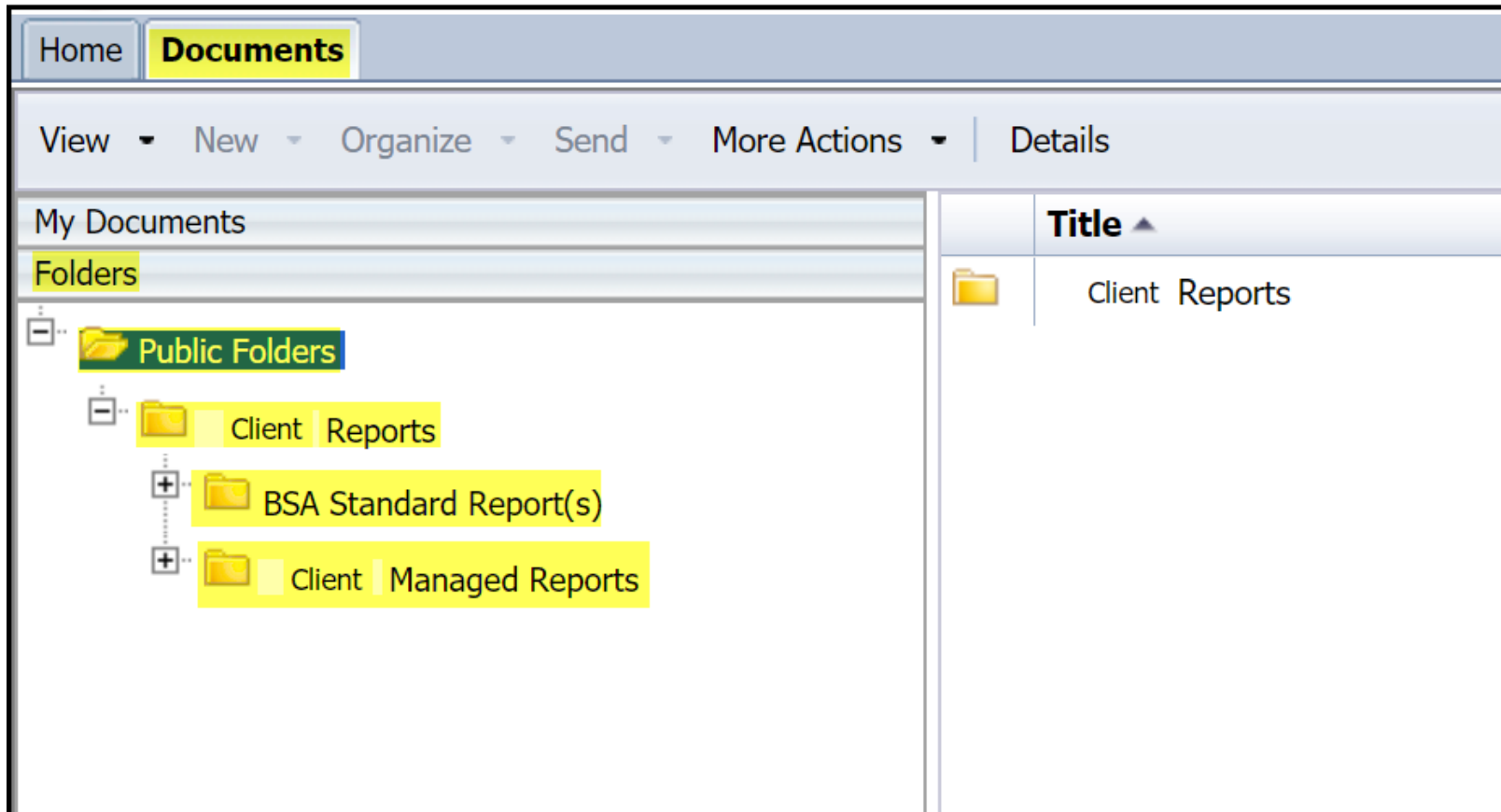


Current State – Report Location(s)



Folders:

The 'BSA Standard' & 'Client Managed' Reports are found within the 'Folders' Drawer



Current State – Standard Report(s)



Division Sales, YTD vs. Prior YTD

Sorted By Descending Sales Cases Chg





Division Name	Sales Cases CY	Sales Cases PY	Sales Cases Chg	Sales Cases Chg %
1 FS Commodity Sales	551	16	535	3,317.42%
1 FS Intl Asia	13,207	6,000	7,207	120.12%
1 FS Intl Mexico	15,307	11,662	3,645	31.26%
1 FS C-Stores	504,116	420,713	83,403	19.82%
1 FS National Accounts	2,070,759	3,373,961	-1,303,202	-38.63%
1 FS Intl Carrib Cntrl/So America	58,601	98,393	-39,792	-40.44%
1 FS East	6,463,603	14,376,902	-7,913,299	-55.04%
1 FS Industrial Sales Culinary	3,727,068	9,995,733	-6,268,665	-62.71%
1 FS House Account Sales	521,082	1,466,526	-945,444	-64.47%
1 FS West	2,548,271	7,650,800	-5,102,529	-66.69%

Enhanced FORGE Analytics Portal



Accessibility



	Programs <hr/>	
	Create Program	Reassign
	Search Program	
	Billbacks <hr/>	
	Create Billback	Search Customer Invoice
	Advanced Search Billbacks	
	Search Billbacks	
	Deployment <hr/>	
	Invoices	Forge Analytics
	Tools <hr/>	
	Settings	About
	Reports Central	Master Data Search
	Clause Library	
	Change Password	
	Browser Settings	



Forge Analytics:

The link will open a new browser window populated with the new Forge Analytics Portal.

Accessibility



Apple Device(s):



Browser Agnostic:



Android Device(s):



Intuitive Design



FORGE ANALYTICS

Search for a report

administrator ▾

- Preferences
- Change Password
- Scheduled Reports
- Logoff

Home

Standard Reports

Custom Reports

My Reports

Inbox

Create Report

Dynamic Searching

Intuitive Preferences

Centralized Report Access

The image shows a screenshot of the Forge Analytics dashboard. The top navigation bar includes the logo, a search bar, and a user profile dropdown. A sidebar on the left contains navigation links. Three callout boxes with dashed blue borders and arrows point to specific features: 'Dynamic Searching' points to the search bar, 'Intuitive Preferences' points to the 'Preferences' option in the user dropdown, and 'Centralized Report Access' points to the sidebar navigation menu.

Centralized Report Access



FORGE
ANALYTICS

☰ Search for a report

🏠 Home ← **Home:**

🕒 Standard Reports

📅 Custom Reports

👤 My Reports

📧 Inbox

✎ Create Report

The Home 'Page' will be the landing spot for a user upon login. It can be customized to allow the user to always land on their desired Report, Dashboard, Relevant Folder, Etc.

Centralized Report Access



The screenshot displays the FORGE ANALYTICS interface. On the left is a dark sidebar with the logo 'FORGE ANALYTICS' at the top. Below the logo are menu items: 'Home', 'Standard Reports', 'Custom Reports', 'My Reports', 'Inbox', and 'Create Report'. A blue arrow points from the text 'Standard Reports:' to the 'Standard Reports' menu item. At the top right of the main content area is a search bar with a hamburger menu icon and the text 'Search for a report'.

Standard Reports:

The Standard Reports Folder houses the new set of BSA Standard Analytics Package.

Centralized Report Access



FORGE
ANALYTICS

☰ Search for a report

- 🏠 Home
- 📊 Standard Reports
- 📄 Custom Reports
- 👤 My Reports
- 📧 Inbox
- ✎ Create Report

Custom Reports:

The Custom Reports Folder houses the client managed public reports. Commonly these reports are custom reports built by Blacksmith for the client

Centralized Report Access



FORGE
ANALYTICS

☰ Search for a report

- 🏠 Home
- 📊 Standard Reports
- 📅 Custom Reports
- 👤 My Reports**
- 📧 Inbox
- ✍️ Create Report

My Reports:

The My Reports Section houses the reports which were formerly found in the users 'My Favorites' reports.

Centralized Report Access



FORGE
ANALYTICS

☰ Search for a report

- 🏠 Home
- 📊 Standard Reports
- 📄 Custom Reports
- 👤 My Reports
- ✉ Inbox
- ✎ Create Report

Inbox:

The Inbox Section will direct the user to the reports which have been sent to them in their FORGE Analytics Inbox.

Centralized Report Access



The screenshot shows the Forge Analytics dashboard. On the left is a dark sidebar with the 'FORGE ANALYTICS' logo at the top. Below the logo are navigation items: 'Home' (with a house icon), 'Standard Reports' (with a pie chart icon), 'Custom Reports' (with a grid icon), 'My Reports' (with a person icon), 'Inbox' (with an envelope icon), and 'Create Report' (with a pencil icon). At the top of the main content area is a dark header with a blue menu icon and the text 'Search for a report'. A blue arrow points from the text 'Create Report:' to the 'Create Report' item in the sidebar.

FORGE ANALYTICS

Home

Standard Reports

Custom Reports

My Reports

Inbox

Create Report

Search for a report

The Create Report option allows the user to create Analytics Reports on an Ad Hoc basis.


Create Report:

Centralized Report Access



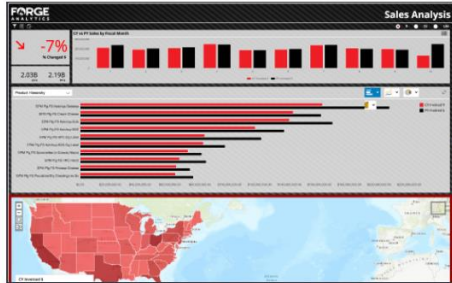
Large Thumbnail Views into Report List:

- When viewing the report lists the users will have options for how to see the reports in the selected folder.

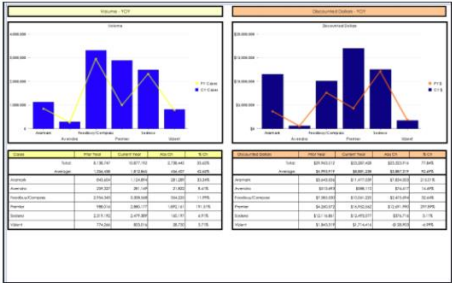


administrator ▾

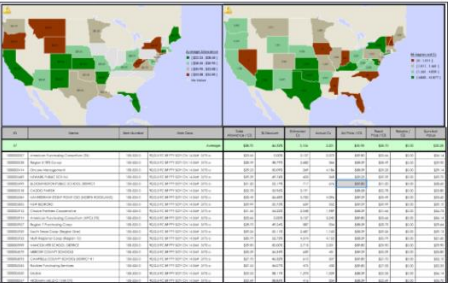
- Home
- Standard Reports
- Custom Reports
- My Reports
- Inbox
- Create Report




1. Sales Analysis Dashboard



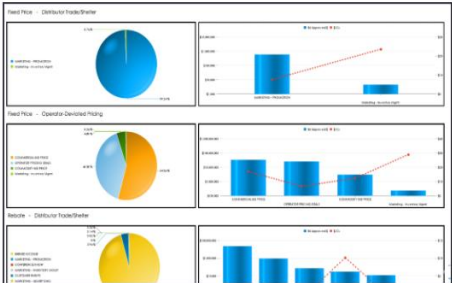
2. GPO Analysis Package



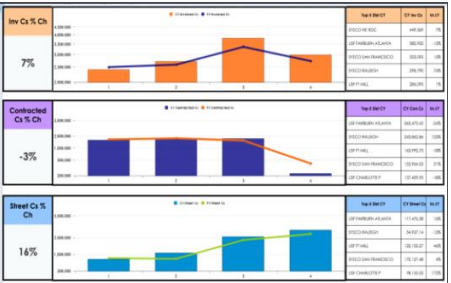
3. Allowance Benchmarking Analysis




4. Margin Analysis Package





5. Analysis - Spending by Component - Current Year To Date - By Paid Date



6. Street Chain Review







analytics4.stage.awayx.com:8008/test_Do

Centralized Report Access



Thumbnail/Desc Views into Report List:

- When viewing the report lists the users will have options for how to see the reports in the selected folder.

FORGE ANALYTICS

Search for a report administrator

- Home
- Standard Reports**
- Custom Reports
- My Reports
- Inbox
- Create Report

- 1. Sales Analysis Dashboard**
Interactive Dashboard to analyze Year over Year Sales Data related to \$'s, Cases, or Lbs. It provides key Year over Year KPI's along with the ability to visualize the data in a multitude of fashions.
- 2. GPO Analysis Package**
Allows the user to analyze their GPO Business in a Year over Year Fashion. It provides key KPI Metrics by Sales Area(s), Product Attribute(s), Distributor Attribute(s), and Geographical Location.
- 3. Allowance Benchmarking Analysis**
Allows the user to Analyze/Benchmark the depth of discount being offered by SKU to each operator. It provides visualizations by Geographical Map, Bubble, and Spreadsheet.
- 4. Margin Analysis Package**
Allows the user to analyze the Margin/Profitability at higher levels rather than at a program by program basis. The data is aggregated by Sales Area, Distributor Attribute(s), Product Attribute(s), Etc.
- 5. Analysis - Spending by Component - Current Year To Date - By Paid Date**
Allows the user to analyze spending based on Component/Spending Type. The data can be viewed at a Component/Spending Type level as well as by Program Type.
- 6. Street Chain Review**
Allows the user to analyze their street business. Each view will provide Sales, Contracted, and Street data at differing levels of aggregation. The data is presented at Distributor, Sales, and Product Levels. Each level also has a view incorporating the End User/Operator.

analytics4.stage.awayx.com:8008/test_Do

Dynamic Searching



The screenshot displays the FORGE ANALYTICS dashboard. On the left is a dark sidebar with the following navigation items: Home (with a house icon), Standard Reports (with a pie chart icon), Custom Reports (with a grid icon), My Reports (with a person icon), Inbox (with an envelope icon), and Create Report (with a pencil icon). At the top of the main content area is a dark header bar containing a blue menu icon (three horizontal lines) and a search input field with the placeholder text "Search for a report". A blue dashed rectangular box highlights the search input field, and a blue dashed arrow points from the text below towards this box.

Utilize the new search to dynamically locate desired reports in all folders you have access to.

Simplified User Account Options



Preferences:

- Easily set user preferences for what should be the view on the dynamic home page in the portal.

The screenshot shows the FORGE ANALYTICS user interface. On the left is a dark sidebar with navigation options: Home, Standard Reports, Custom Reports, My Reports, Inbox, and Create Report. The top navigation bar includes a search box and a user profile dropdown for 'administrator'. The main content area is titled 'User Preferences' and features a section for 'Home Page' with four radio button options: 'My Favorite Reports', 'Report List', 'FORGE Inbox', and 'Report'. The 'Report' option is selected. Below this, a list of report filters is shown, including 'Document: Analysis - GPO Analysis Package - PY vs CY - Prior 52 vs Current 52 Weeks Rolling - By Delivered End Date' and various 'IsMEnter value(s)' for fields like Broker Name, Market Name, Region Name, Division Name, Dist ID, Dist Name, Corp Parent, Buying Group, Item Number, Item Desc, Type Code, Type Group, and Q Brand. At the bottom are 'Save Preferences' and 'Cancel' buttons.

Simplified User Account Options



Change Password:

- Easily change password to access

The screenshot displays the Forge Analytics web application interface. On the left is a dark sidebar with the 'FORGE ANALYTICS' logo and navigation links: Home, Standard Reports, Custom Reports, My Reports, Inbox, and Create Report. The top navigation bar includes a search box 'Search for a report' and a user profile dropdown for 'administrator'. The main content area is titled 'Change Password' and contains three input fields: 'Current Password', 'New Password', and 'Repeat New Password'. A blue 'Change PW' button is positioned below the fields. A dropdown menu is open from the 'administrator' profile, listing 'Preferences', 'Change Password' (highlighted in blue), 'Scheduled Reports', and 'Logoff'.

Simplified User Account Options



Scheduled Reports:

- Easily locate all reports which you have scheduled
- Easily alter the schedule

FORGE ANALYTICS

Search for a report

administrator ▾

Scheduled Reports

All Scheduled Reports ▾

<input type="checkbox"/>	Schedule Name ▾	Report Name ⇅	Frequency ⇅	Format ⇅	Distribution ⇅	Destination ⇅
<input type="checkbox"/>	Allowance Benchmarking	3. Allowance Benchmarking Analysis	Weekly : Monday	Excel	Email	administrator
<input type="checkbox"/>	Sysco Corporate Analysis	Analysis - Corporate Parent Analysis Package - PY vs CY Thru Current Period - Delivered End Date	Weekly : Thursday	Excel	Email	administrator

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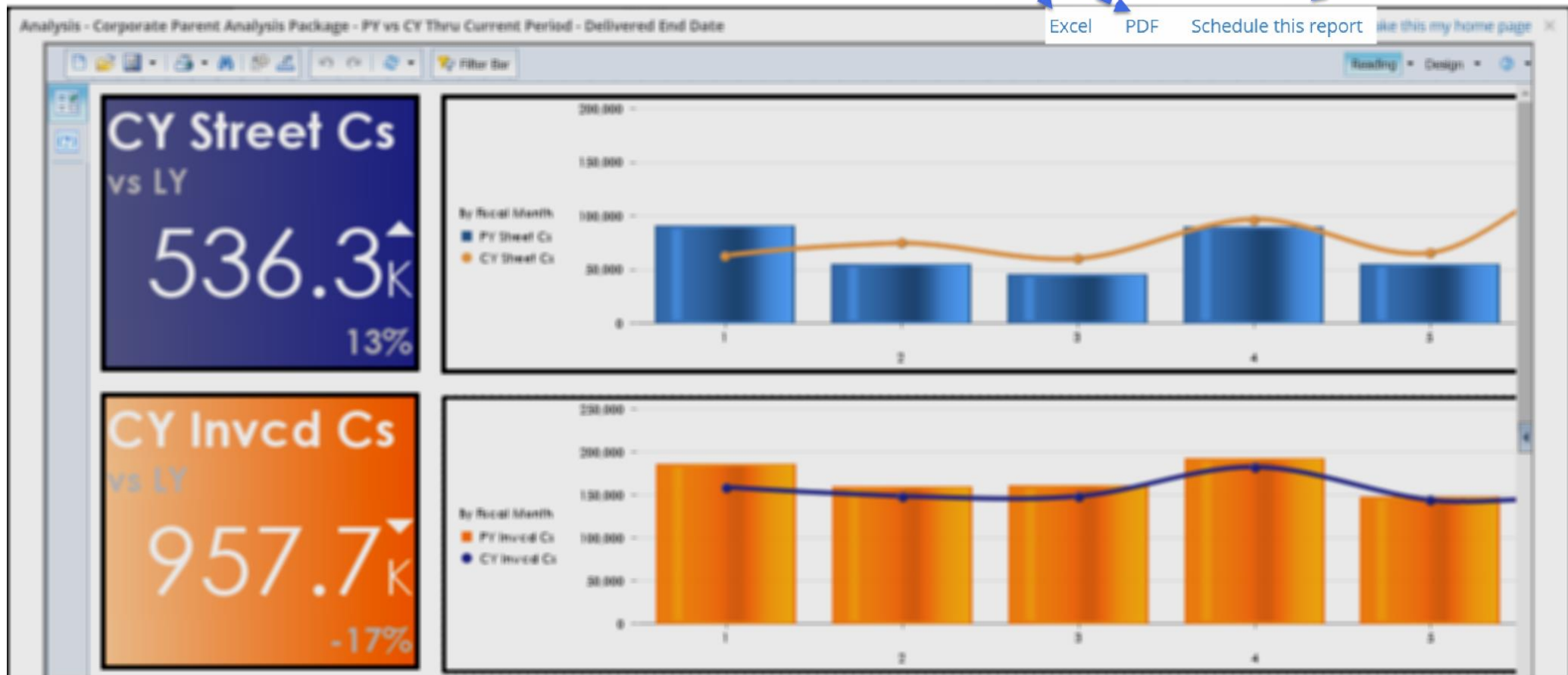
Streamlined Export/Scheduling



Export or Schedule the report to send via the new easy access links

Export Data using new links

Schedule report using new link




Streamlined Scheduling



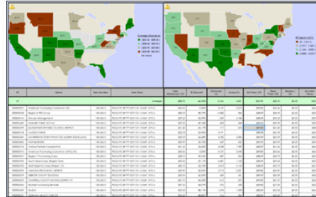
Step 1:

Select Prompts/Filters

Search for a reportadministrator

- Home
- Standard Reports
- Custom Reports
- My Reports
- Inbox
- Create Report

Schedule a Report



Analysis - Corporate Parent Analysis Package - PY vs CY Thru Current Period - Delivered End Date

The purpose of this Analysis Package is to allow users to analyze Invoiced & Actual Spending by the selecting of the Corporate Parent related to the Distributor. This report will return Invoice & Actual Billback Data for the current and prior fiscal year(s) through the current fiscal period which they are currently in. In this Analysis Package the Actual Billback Data is being associated to the Fiscal Period(s) based on the Delivered End Date of the underlying transactions associated to the contracted business.

Report Prompts | Frequency | Delivery Options | Review

Enter value(s) for Corp Parent*

Showing all 7

Filter

→ →

- A&W - CANADA
- ENGLISH BAY BATTER INC
- F A S LANTHIER LTEE
- NADOR INC PARENT
- NATIONAL GROCERS WEST PARENT
- TDL GROUP LTD
- YEN BROS. FOOD SERVICE LTD.

Showing all 1

Filter

← ←

- SYSKO FOODSERVICE


Previous | Next | Cancel

Streamlined Scheduling

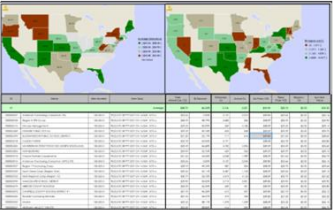


Step 2:

Select Frequency

Search for a reportadministrator

Schedule a Report



Analysis - Corporate Parent Analysis Package - PY vs CY Thru Current Period - Delivered End Date

The purpose of this Analysis Package is to allow users to analyze Invoiced & Actual Spending by the selecting of the Corporate Parent related to the Distributor. This report will return Invoice & Actual Billback Data for the current and prior fiscal year(s) through the current fiscal period which they are currently in. In this Analysis Package the Actual Billback Data is being associated to the Fiscal Period(s) based on the Delivered End Date of the underlying transactions associated to the contracted business.

Report Prompts Frequency Delivery Options Review

Daily

Runs daily at the time specified.

10am


Previous Next Cancel

Streamlined Scheduling



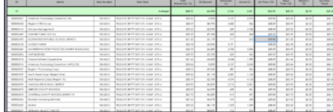

Step 3:

Delivery Options



Search for a report administrator ▾

Schedule a Report



Analysis - Corporate Parent Analysis Package - PY vs CY Thru Current Period - Delivered End Date

The purpose of this Analysis Package is to allow users to analyze Invoiced & Actual Spending by the selecting of the Corporate Parent related to the Distributor. This report will return Invoice & Actual Billback Data for the current and prior fiscal year(s) through the current fiscal period which they are currently in. In this Analysis Package the Actual Billback Data is being associated to the Fiscal Period(s) based on the Delivered End Date of the underlying transactions associated to the contracted business.

Report Prompts | Frequency | **Delivery Options** | Review

Report Format

Adobe PDF

Microsoft XLS

My Distribution

Email to me

Send to my FORGE Inbox

FTP to reports.ftp02.unilever.com

Email to others

[administrator](#)


Previous | **Next** | **Cancel**

Streamlined Export/Scheduling



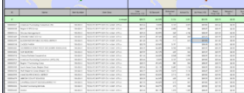

Step 4:

Review

☰ administrator ▾

- Home
- Standard Reports
- Custom Reports
- My Reports
- Inbox
- Create Report

Schedule a Report



Analysis - Corporate Parent Analysis Package - PY vs CY Thru Current Period - Delivered End Date

The purpose of this Analysis Package is to allow users to analyze Invoiced & Actual Spending by the selecting of the Corporate Parent related to the Distributor. This report will return Invoice & Actual Billback Data for the current and prior fiscal year(s) through the current fiscal period which they are currently in. In this Analysis Package the Actual Billback Data is being associated to the Fiscal Period(s) based on the Delivered End Date of the underlying transactions associated to the contracted business.

Report Prompts | **Frequency** | **Delivery Options** | **Review**

Schedule Name

Report Name:
Analysis - Corporate Parent Analysis Package - PY vs CY Thru Current Period - Delivered End Date

Report Prompts

Oper Name =
Enter value(s) for Broker Name =
Enter value(s) for Market Name =
Enter value(s) for Region Name =
Enter value(s) for Division Name =
Enter value(s) for Dist ID =
Enter value(s) for Dist Name =
Enter value(s) for Corp Parent = SYSCO FOODSERVICE
Enter value(s) for Buying Group =
Enter value(s) for Item Number =
Enter value(s) for Item Desc =
Enter value(s) for Type Code =
Enter value(s) for Type Group =
Enter value(s) for Q Brand =

Frequency

Daily : 10am - Runs daily at the time specified.

Report Format

Excel

Distribution

Email to me

Previous | **Save Schedule** | **Cancel**

New Standard Analysis Package

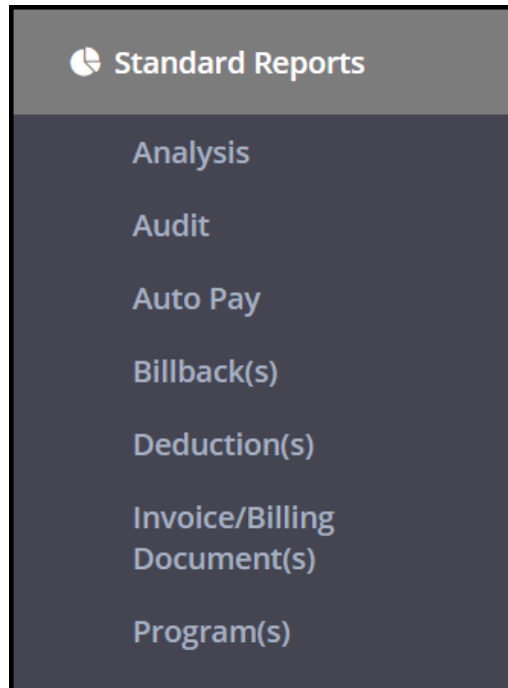


New Standard Package

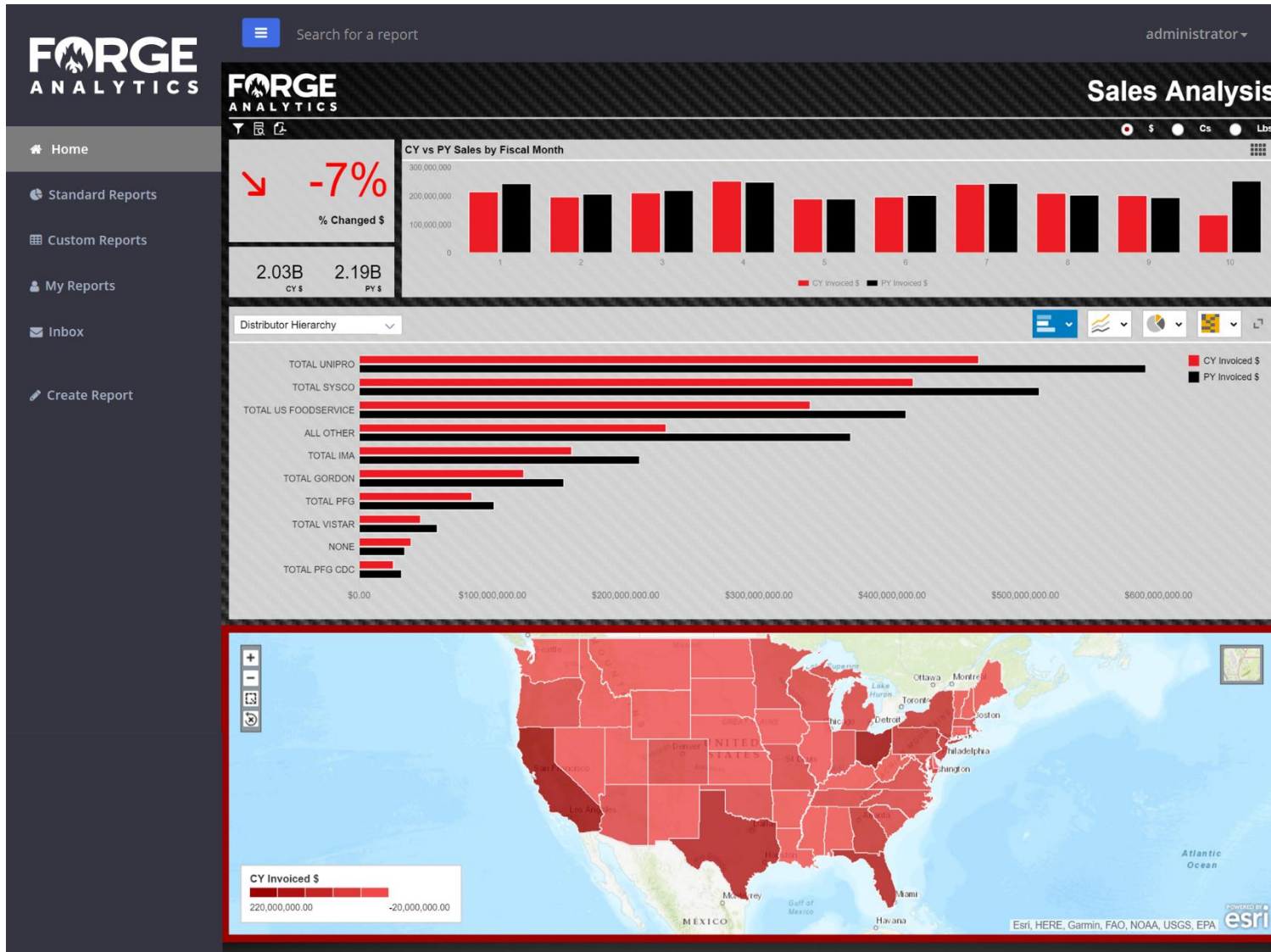


New Analytics Report Package Count by Type:

- Analysis = 126
- Audit = 10
- Auto Pay = 5
- Billback(s) = 70
- Deduction(s) = 23
- Invoice/Billing Document(s) = 19
- Program(s) = 26



New Standard Package



Interactive Dashboards:

- Highly Interactive
- Export to Excel
- Export to PDF



Let's Take a look



THANK YOU!!!!
For being such great
clients!!