

Data View Designer 4.0

Shiloh's Data View Designer allows users to build queries and save them, append graph /chart/ map / pivot / gauge, publish as a dashboard item, a Quick View, or an Excel template report, or use in Shiloh explorer, forecasting, order writer, and trait matrix. This is where the users learn the power to truly leverage the capabilities of Shiloh. Anyone responsible for building or changing reports, Quick Views, dashboards, datasets for order writing, forecasting, or trait matrix will want to learn Data View designer.

Class length: 6 hours

Who should attend: Most users should attend – I would exclude those that would only be using what has already been built for them (like higher executives that will just drive what their analysts have pre-built).

Prerequisites: Shiloh Basic 4.0

Topics will include:

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| <ul style="list-style-type: none"> ▪ Introduction to Data View Designer (DVD) <ul style="list-style-type: none"> – DVD function – How data views are used in Shiloh ▪ Data View Designer Controls <ul style="list-style-type: none"> – Dataset Name – Column Selection Pane – Data Set Builder (Center Screen) – Result Set view ▪ Build a Simple Data Set/View <ul style="list-style-type: none"> – Item Nbr – Item Desc – POSSales ▪ Run the Data Set ▪ Reintroduce the Parms Screen ▪ Results Set ▪ Export to Excel-Select or All ▪ How to Change Captions <ul style="list-style-type: none"> – Discuss overrides ▪ Creating Dashboards <ul style="list-style-type: none"> – Maps – Gauges – Pivots | <ul style="list-style-type: none"> ▪ Explorer <ul style="list-style-type: none"> – Setting up Data Sets – Need to exclude Calcs – Creating Calcs in Explorer setup ▪ Calculations <ul style="list-style-type: none"> – Standard – Custom Numbers – Custom Text ▪ Results Filters <ul style="list-style-type: none"> – Filter based on a number – Filter by comparing the values from different fields in the Data Set ▪ Sorting ▪ Visible Check Box ▪ Ribbon Controls <ul style="list-style-type: none"> – Columns Control Group ▪ Weeks Across and Pivoting ▪ Column Store/Item Group Overrides ▪ Copy Data Sets ▪ Import/Export Data Sets <ul style="list-style-type: none"> – Remove Specific Item and Store Group filters – Remapping fields that don't exist |
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