Mueller's Reporting Platform User Guide

1.0

Table of Contents

Getting started

System requirements

Mueller's Reports Platform is web-based and does not require users to install any special software locally on their computers. The site is compatible with all modern web browsers that allow JavaScript.

The following browsers have been tested and are known to be compatible:

- Chromium/Google Chrome
- Mozilla Firefox 4.0 or higher
- Internet Explorer 8.0 or higher

While other browsers may work just fine, they have not been tested.

> **Tip**
>
> The reporting platform makes extensive use of the JavaScript programming language, which may run slowly in older versions of Internet Explorer. This is an issue with Internet Explorer, not Mueller's reporting site. If you are restricted to using an older version of Internet Explorer, consider installing the Google Chrome Frame [http://www.google.com/chromeframe/?quickenable=true] plug-in, which allows you to use the faster Chrome engine within Internet Explorer.

Logging in

To log in, open your web browser and go to the Reports login page [https://reporting.mueller-inc.com]. From the login screen, enter your username and password, then click the Login button. See Figure 1 on page 2 .

Figure 1. Login page

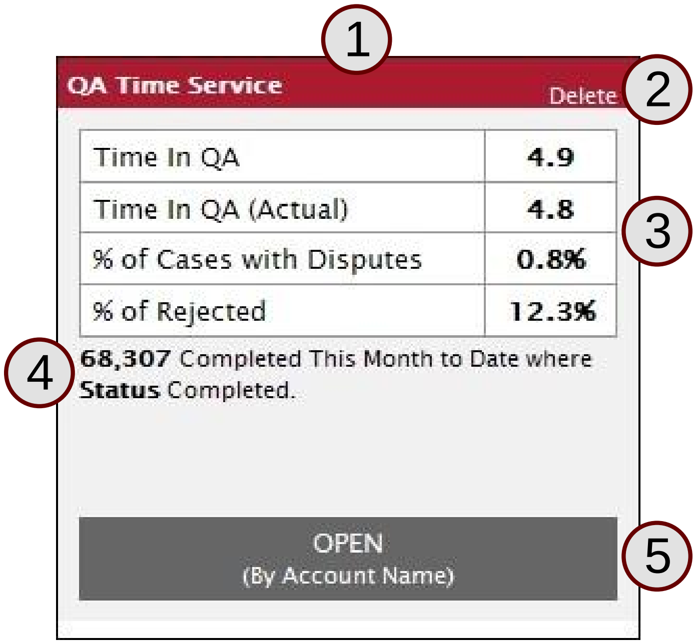
The Management Reports login page (left) and forgot password screen (right).

If you cannot remember your password, you can reset it by clicking the Forgot Password? button. Type your full email address with domain that was used to create your account (e.g. jdoe@example.com) into the text box, then click the Send button. See Figure 1 on page 2 .

Dashboard

The Dashboard displays widgets that summarize each report, with one widget representing one report. The information in widgets will vary, depending on the type of report.

Figure 2. The Dashboard



A widget from the dashboard. (1) widget title bar (2) delete link (only available for user-created reports) (3) metrics for the report (4) total number of data points in this report with date and filter settings applied (5) button to open report

Procedure 1. Rearranging dashboard widgets

1. Hover the mouse over the title bar of the widget you want to move.
2. Click and hold the left mouse button.
3. Drag the widget to a new location and release the left mouse button; other widgets will automatically adjust their location.

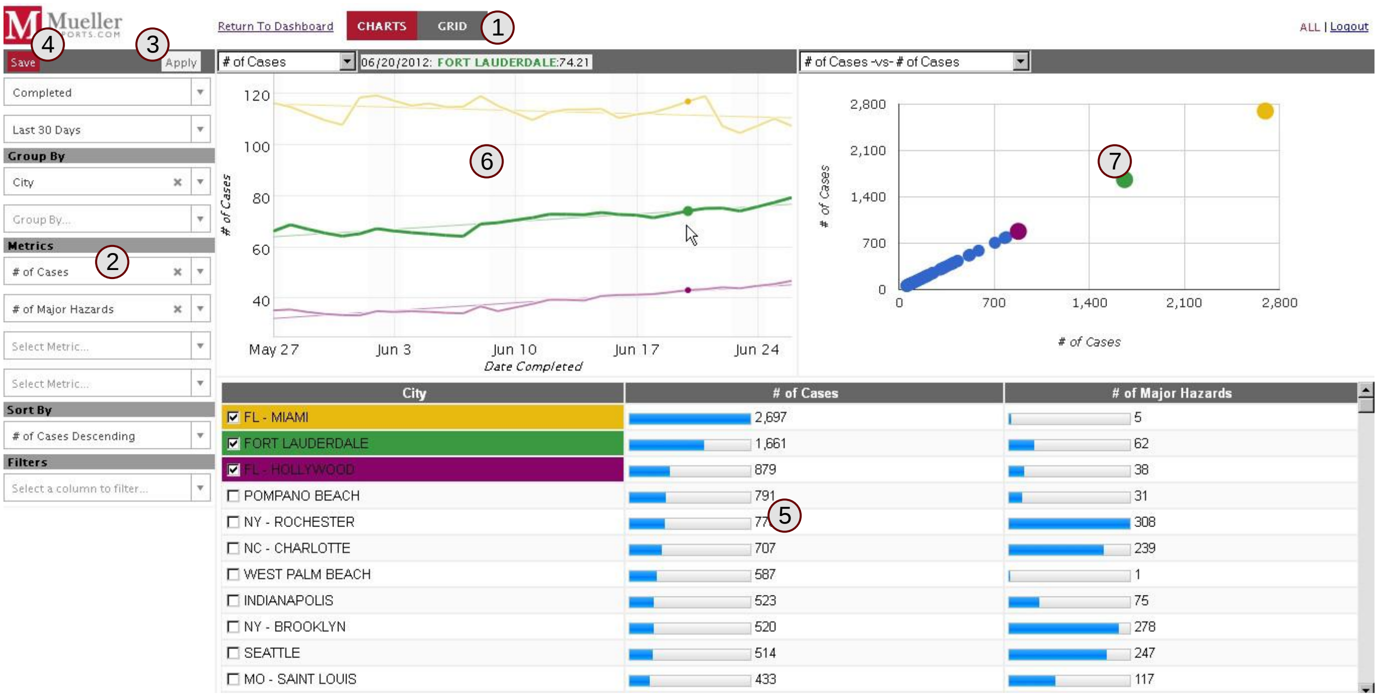
To open a report, click on the "OPEN" link at the bottom of the widget (#5 in Figure 2 on page 3). The "By..." on this button tells you how the report is grouped. For example, a report "By Account Name" will be grouped by the field "account name."

When you save a new report, its widget will appear at the bottom of the dashboard. Reports that you have created will have a delete link in the upper-right corner of the widget as well.

Viewing a report

The Report Screen is where you can view the details of a report, add filters, create charts, and view raw data points. It is divided into two views: Charts and Grid. Charts allows you to view and manipulate high level data; the Grid gives you access to individual data sets and allows you to export data points for use in other software.

Figure 3. The Report Screen



The Report Screen in charts view (1) Switch between Charts and Grid views (2) The sidebar (3) Apply filters button, grayed-out when there are no filters to apply (4) Save report button (5) Report data table (6) trend charts for currently selected report data (7) Scatter plot chart for all report data

Figure 3 on page 4 shows the Report Screen in chart view. Click the CHARTS GRID button to switch between the two views, or click the Return To Dashboard link to close the report and return to the dashboard. If you made any changes to it and you want to view those changes later, you'll need to save your report (Procedure 2 on page 4).

At the bottom of the reports screen, you can view the groups of data. Click the column title bar to sort data by that column; click it again to reverse the order.

The blue bars in the data table represent the percentage of that data of the largest value in that column. For example, if there is a dataset with the number of cases and the highest data entry as 100 cases, an entry with 50 cases will have a blue bar that is 50% full. The largest value will always be displayed at 100%.

If you make changes to filters, metrics, groups, etc, you'll need to save your report for those changes to persist. See Procedure 2 on page 4 .

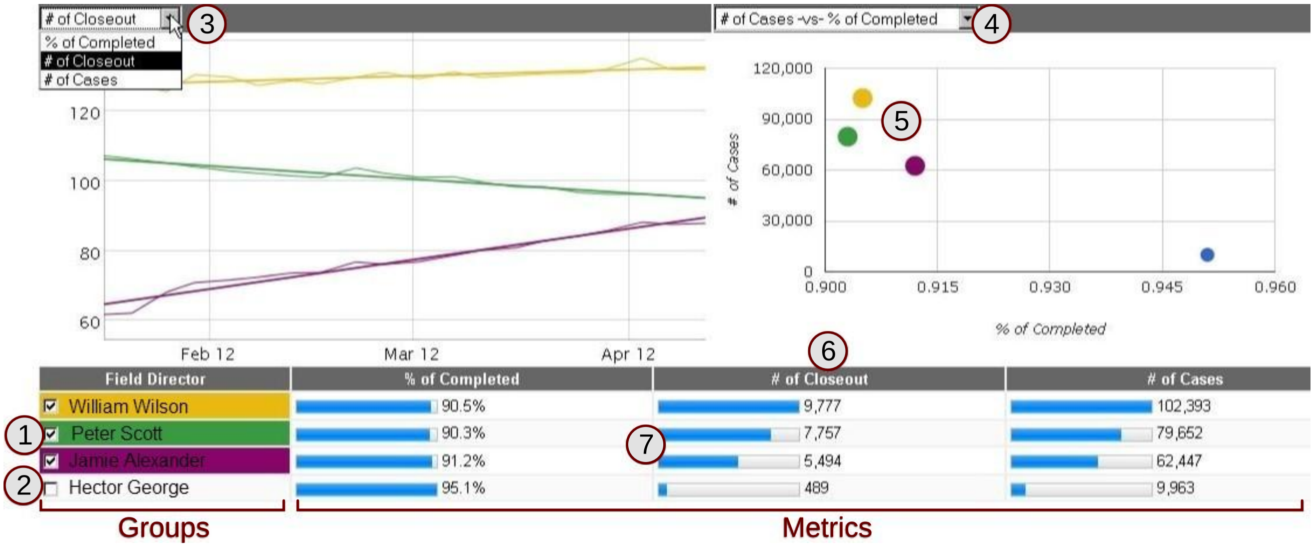
Procedure 2. Saving a custom report

1. Click the Save button above the filter list.
2. Type a name for your new report into the Report Name text box.
3. Click Save As to save your report.

Charts view

The charts view of the report screen shows a visual representation of the user's data. You can apply a filter(s) to hide some data and make graphs easier to read and understand. You can also add up to four metrics against which your data can be analyzed.

Figure 4. Charts view



The charts section of the report view. (1) A selected group (2) An unslected group (3) Select metrics to be used to generate the trend chart (4) Select metrics to be used to generate the scatter plot chart (5) Color-coded selected groups (6) A metric column (7) Percent indicator for a metric

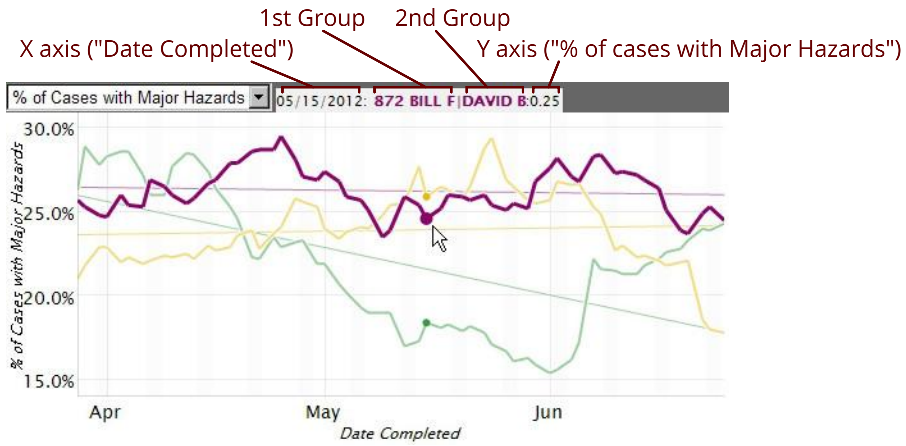
The bottom of the screen shows the current dataset after the date range and filters have been applied. You must have at least one group selected at any given time; the first column (or two columns if two groups are selected) will always be the currently selected group. In Figure 4 on page 5, Field Director is the first assigned group. The rest of the columns represent the current metrics. See Groups on page 7 and Metrics on page 8 .

> **Tip**
>
> Adding more groups means creating more groups in the dataset display (#7 in Figure 4 on page 5); adding more metrics will give you more axis options (#3 and #4).

To set what group will be displayed, click on the checkbox next to it. When a group is selected, it will be automatically assigned a unique color, which will be used to represent that group on the trend and scatter charts.

The trend chart displays two lines for each group; the jagged line represents actual data points, while the straight line show the trend of the actual data. As you move your mouse over the trend chart, you will see dots appear vertically on each of the lines. These dots represent data entries in your current dataset; more dots means that the data is higher resolution. You will also see the actual data displayed above the graph.

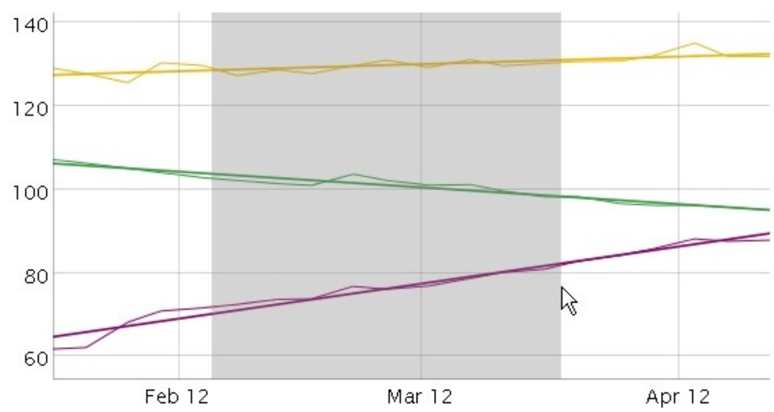
Figure 5. Trend chart



The trend chart, with the mouse hovering over an individual data point. The actual values and group names are displayed above the chart for the current data point.

The trend chart axises will automatically scale based on the current data that is displayed. You can zoom in on the data by clicking the left mouse button and dragging horizontally or vertically. This will zoom in on your data, but not affect the data resolution. The X and Y axises will scale appropriately to the new zoom level. To return to the normal zoom level, double click the left mouse button.

Figure 6. Zooming on the trend chart

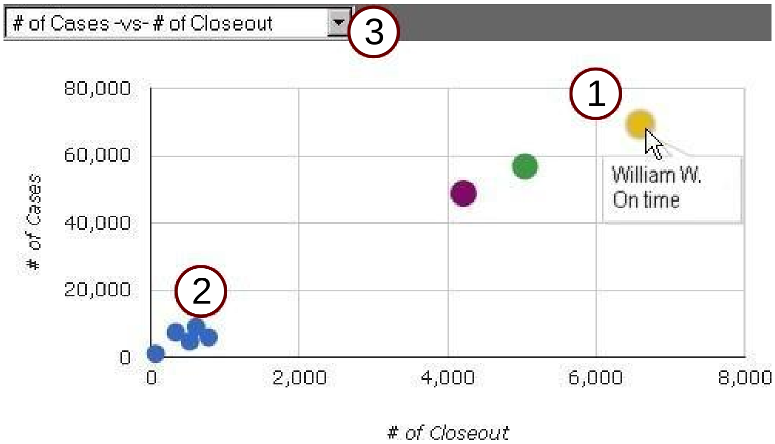


Zooming horizontally on the trend chart by clicking the left mouse button and dragging horizontally. You can also zoom vertically.

The drop-down above the trend chart allows you to change the Y-axis of the chart; the X-axis will always by the date. The available options in this drop-down are determined by your current metrics. See Metrics on page 8 .

The scatter point chart (Figure 7 on page 7) shows all of your groups, both selected and unselected. Unselected groups will be displayed as a , while selected groups are color-coded to match the table at the bottom of the screen. If you hover over a point, you will see the name of the group(s) for that dataset.

Figure 7. Scatter point chart



The drop-down menu above the scatter point chart is used to change the X and Y axises for the chart. The first metric listed is the Y-axis; the second metric is the X-axis.

Groups

Groups are used to *separate* data. For example, say that you have a set of 100 cases. If you set the first group to Agent Name, your data will be separates and grouped by individual agents. If you select a second group, your data will be further separated. Table 1 on page 7 shows how one dataset can be broken into smaller chunks by adding groups.

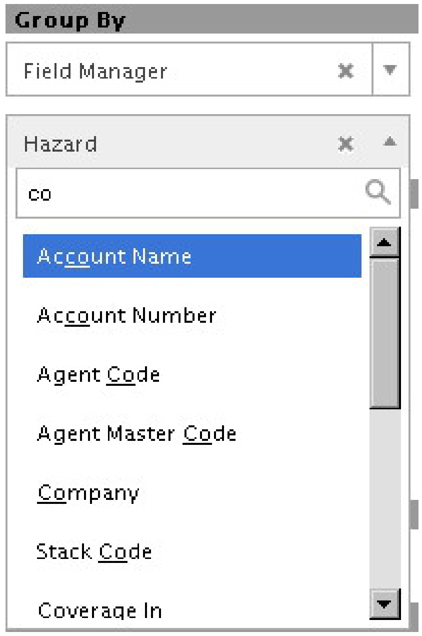
> **Note**
>
> Need an explanation of what a specific group is actually includes? Take a look at the Group and Metrics Reference Documentation [../../reports/docs].

Table 1. Group usage affect on data

No groups	Agent		Agent & Status	
100 cases	Jane	65 cases	Jane & completed	34 cases
			Jane & incomplete	31 cases
	John	35 cases	John & completed	25 cases
			John & incomplete	10 cases

Combo boxes across the Management Reports use fuzzy string matching, meaning you'll find what you type, even if what you type is in the middle or at the end of a word. This is very useful if all you can remember is that the group you want is called the "something code."

Figure 8. Adding a group



Adding a group.

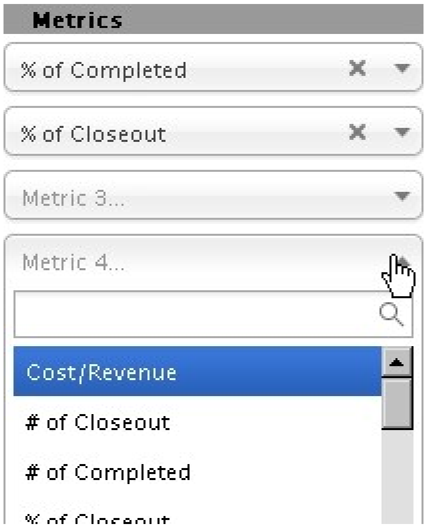
A maximum of two groups may be used. Each dataset grouping can be represented on the trend chart and the scatter plot chart by activating it in the dataset display list at the bottom of the screen.

Metrics

Metrics are used to *analyze* datasets. The # of cases metric is always available by default; users can add up to four additional metrics.

> **Note**
>
> Need an explanation of what a specific metric actually measures? Take a look at the Group and Metrics Reference Documentation [../../reports/docs].

Figure 9. Metrics



The metrics section of the sidebar, with two metrics added and the add metric drop-down displayed.

Procedure 3. Adding a user defined metric

1. Click the box for the metric you want to add or modify from the sidebar.
2. Find the desired metric in the scroll list; you can filter the list by typing into the search box
3. Click the Apply button for your metric to be added.

To remove a metric, click the × button on the right side of the metric, then click the Apply button.

When you add a new metric, it will be available from the drop-down menu above the trend chart and scatter plot chart. For more information see Charts view on page 4 .

Filters

Filters allow users to reduce the amount of visible data to find the information they want. For example, a "Coverage In" filter can be used to only display cases within a given "coverage in" range. Only data that meets the criteria of all currently active filters will be displayed.

> **Tip**
>
> If you got the filters the way you like it, you can save your current settings as a new report. See Procedure 2 on page 4 .

The date filter found at the top of the sidebar is one of the most common filters used. For some selections, you'll need to enter a range of dates (Figure 10 on page 10).

Figure 10. Date filter

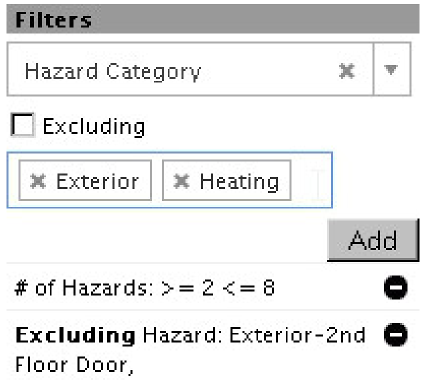
Procedure 4. Using the date filter

1. Select the starting point for the filter (e.g. from the date ordered) from the first drop-down menu.
2. Select the time period to go back using the second drop-down menu.
3. Click the Apply button to make your filter take effect.

> **Tip**
>
> A report can contain thousands or tens of thousands of individual data points. Using the date filter can not only hide information you don't need but can also improve the management reports' performance.

All other filters are found under the Filters heading on the sidebar. All of these filters require the user to specify a value(s) or range. For example, if you select the "City" filter, a secondary menu will appear below it where you will need to select the city for your filter. You can also add filters that exclude specific data. This would be useful, for example, if you wanted to include all data from a specific county, but exclude data from a specific city in that county.

Figure 11. Filters



The filters; click within the box containing "Exterior" and "Heating" to add another value to this filter.

Procedure 5. Adding a new filter

1. Find the desired filter from the filter drop-down located in the filter section of the sidebar.
   a. If the filter requires additional information, such a numerical range, enter that information now using the appropriate controls.
   b. If you want the filter to exclude values from your report rather than include them, check ☐ Excluding.
2. Click the Add button
3. Click the Apply button to make your filter take effect.

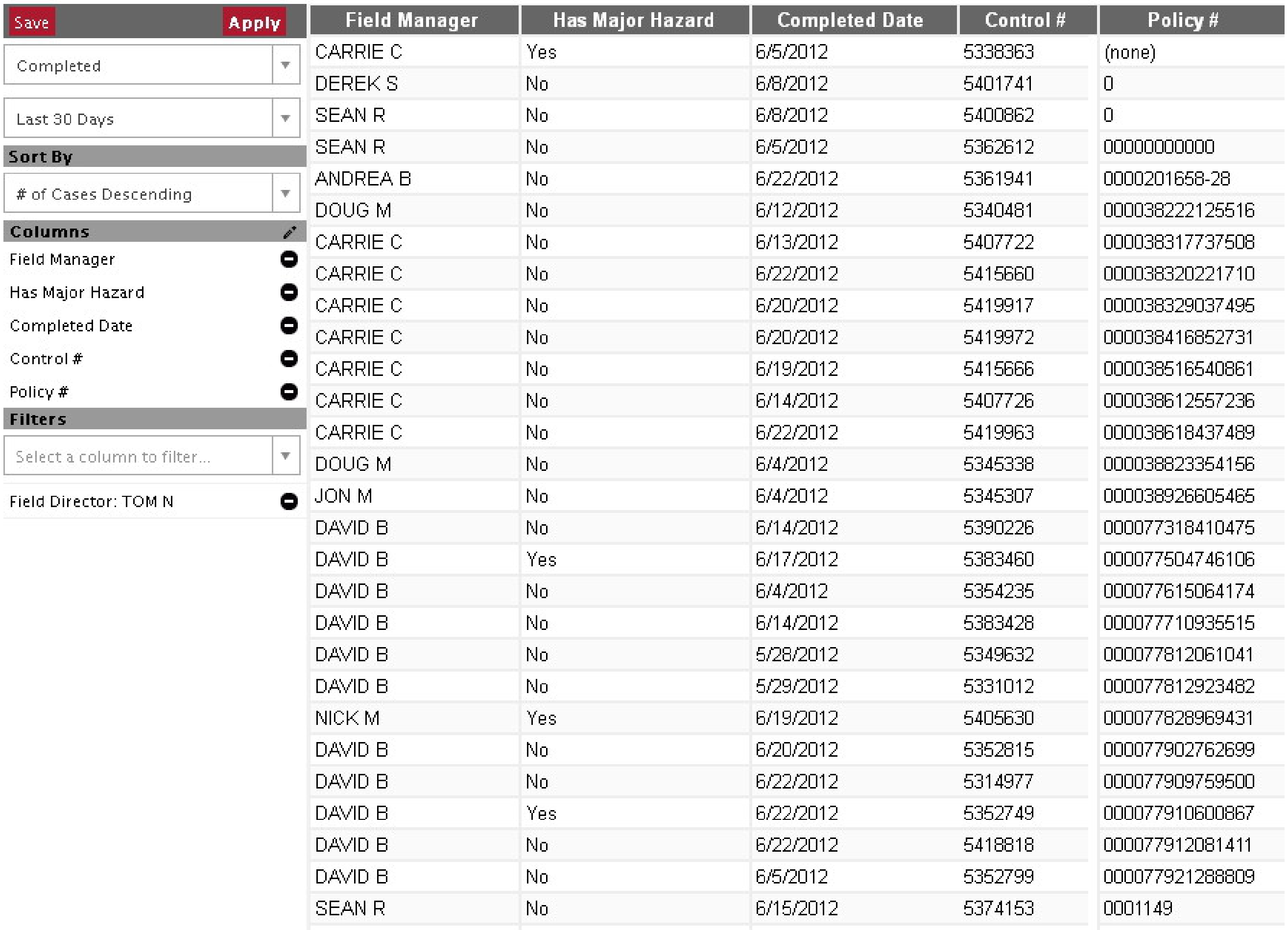
If the filter you are using requires you to select specific values (e.g. stack codes), you can select more than one value for the same filter. Click the blue box where your first value appears and the appropriate menu will be displayed again. To remove any values before adding the filter, click the ✖ button on the left side of the value.

To remove a filter after it has been added, click the ⊖ to the right of the filter. If you want to revise a filter after it has been added to a report, you'll need to remove it first, then the filter again.

Grid screen

The Grid is used to view the actual data that was used to generate a report. To access it, click GRID.

Figure 12. Grid view



Field Manager	Has Major Hazard	Completed Date	Control #	Policy #
CARRIE C	Yes	6/5/2012	5338363	(none)
DEREK S	No	6/8/2012	5401741	0
SEAN R	No	6/8/2012	5400862	0
SEAN R	No	6/5/2012	5362612	00000000000
ANDREA B	No	6/22/2012	5361941	0000201658-28
DOUG M	No	6/12/2012	5340481	000038222125516
CARRIE C	No	6/13/2012	5407722	000038317737508
CARRIE C	No	6/22/2012	5415660	000038320221710
CARRIE C	No	6/20/2012	5419917	000038329037495
CARRIE C	No	6/20/2012	5419972	000038416852731
CARRIE C	No	6/19/2012	5415666	000038516540861
CARRIE C	No	6/14/2012	5407726	000038612557236
CARRIE C	No	6/22/2012	5419963	000038618437489
DOUG M	No	6/4/2012	5345338	000038823354156
JON M	No	6/4/2012	5345307	000038926605465
DAVID B	No	6/14/2012	5390226	000077318410475
DAVID B	Yes	6/17/2012	5383460	000077504746106
DAVID B	No	6/4/2012	5354235	000077615064174
DAVID B	No	6/14/2012	5383428	000077710935515
DAVID B	No	5/28/2012	5349632	000077812061041
DAVID B	No	5/29/2012	5331012	000077812923482
NICK M	Yes	6/19/2012	5405630	000077828969431
DAVID B	No	6/20/2012	5352815	000077902762699
DAVID B	No	6/22/2012	5314977	000077909759500
DAVID B	Yes	6/22/2012	5352749	000077910600867
DAVID B	No	6/22/2012	5418818	000077912081411
DAVID B	No	6/5/2012	5352799	000077921288809
SEAN R	No	6/15/2012	5374153	0001149

The grid view. This table represents all the data in a report

While all of the data for the report is available, it won't all be loaded at once. As you scroll down the page, additional rows will automatically be loaded and displayed.

Filters and metrics that were applied in Charts View will still be in effect in Grid View.

> **Note**
>
> Metrics are found in the "Sort by" drop-down in Grid View.

Working with columns

Data points are represented as a table, similar to a spreadsheet. Like a spreadsheet, you can add new columns that contain additional data.

Procedure 6. Adding a column

1. Click the  next to "Columns" in the sidebar.
2. Find the desired column to add in the combo box by typing into the search box or scrolling through the list.

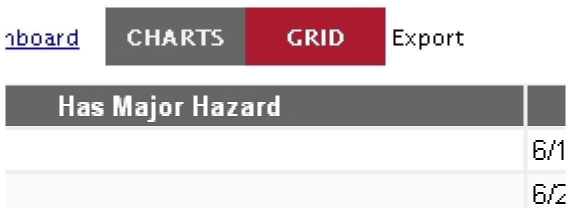
3. Click the icon next to the desired column.
4. Once all columns have been added, click the pencil icon again to close the combo box.
5. Click the Apply button.

You can sort by a column by clicking the header cell for the column; clicking it again will reverse the sort order.

Exporting a CSV file

Report data points can be exported to a comma separated value (CSV) file. Many spreadsheet programs, such as Microsoft Excel and LibreOffice Calc, can open this type of file.

Figure 13. Exporting grid data



*Exporting report data to a *.CSV file that can be read by Microsoft Excel.*

To export report data from grid view, click Export to the right of the CHARTS GRID. Save the `*.csv` file to your computer and open with your spreadsheet program.

Frequently asked questions

Q: Why didn't adding a filter, group, or metric do anything?
A: After adding or changing anything in the sidebar, you must click the Apply button.
Q: Why are all my filters, groups, etc lost when I close a report?
A: You need to save your changes as a new report. Do this by clicking the Save button on the top-left of the sidebar.
Q: Why didn't my data change after removing a filter, group, or metric?
A: Like adding a filter, group, or metric, you must click the Apply button after removing an item for your change to take affect.
Q: I zoomed in on the trend chart; how do I zoom back out?
A: Double click the left mouse button anywhere on the trend chart to return to the original zoom level
Q: Where can I find out what a group or metric actually measures?
A: See the Groups and Metrics Reference Documentation [../../reports/docs].