

# GETTING STARTED - *a quick guide*



## PowerStats Limited

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# WELCOME!

PowerStats is a cloud-based benchmarking platform, intended to place vital insight right at your fingertips, thus allowing to make better-informed business decisions, faster!

This generic “Quick Guide” is intended to provide you with an overview of only the basic PowerStats functions.

As the specification varies greatly from project to project, some of the options shown here may not be available for your use in your PowerStats account. Saying this, if you feel that a function SHOULD be available to you, but it's not, please don't hesitate to contact your project's administrator, or PowerStats, for support.

This Quick Guide covers (*click to jump to relevant section*):

- 1. General overview,**
- 2. Adding your data,**
- 3. Creating and editing reports,**

- 4. Arranging reports on your dashboard,**
- 5. Viewing reports,**
- 6. Exporting to Excel, and finally:**
- 7. Logging in and changing passwords.**

If you get stuck at any stage, please feel free to e-mail us on [support@powerstats.co](mailto:support@powerstats.co) or call us on +64-9-320-5144.

For advanced help, visit our knowledge base - just click on SUPPORT in the SETTINGS tile inside your account.

We hope you enjoy using PowerStats, and look forward to your feedback!



# GENERAL OVERVIEW

PowerStats is a real-time, online benchmarking and industry statistics service, with each one of our projects being customised for a particular industry.

The core functions of all projects are the same - and this is a brief overview of these core functions.

For this quick guide, we've used a demo project. Please apply the concepts in this guide to your own project.

The next page shows a dashboard with a few reports - this is what you will likely see when you log in.

If you don't see any reports at all when you log in, try either of these two steps:

1. Go to the SETTINGS tile, then choose "Dashboard Settings, and move any "hidden reports" to "Page 1"
2. If you can see the ADD REPORTS tile on the left, create some reports yourself! Learn how on the next few pages.

**There are 4 pages of reports**

**Who are you logged in as \*\***

**Some of your reports (p. 1 of 4)**

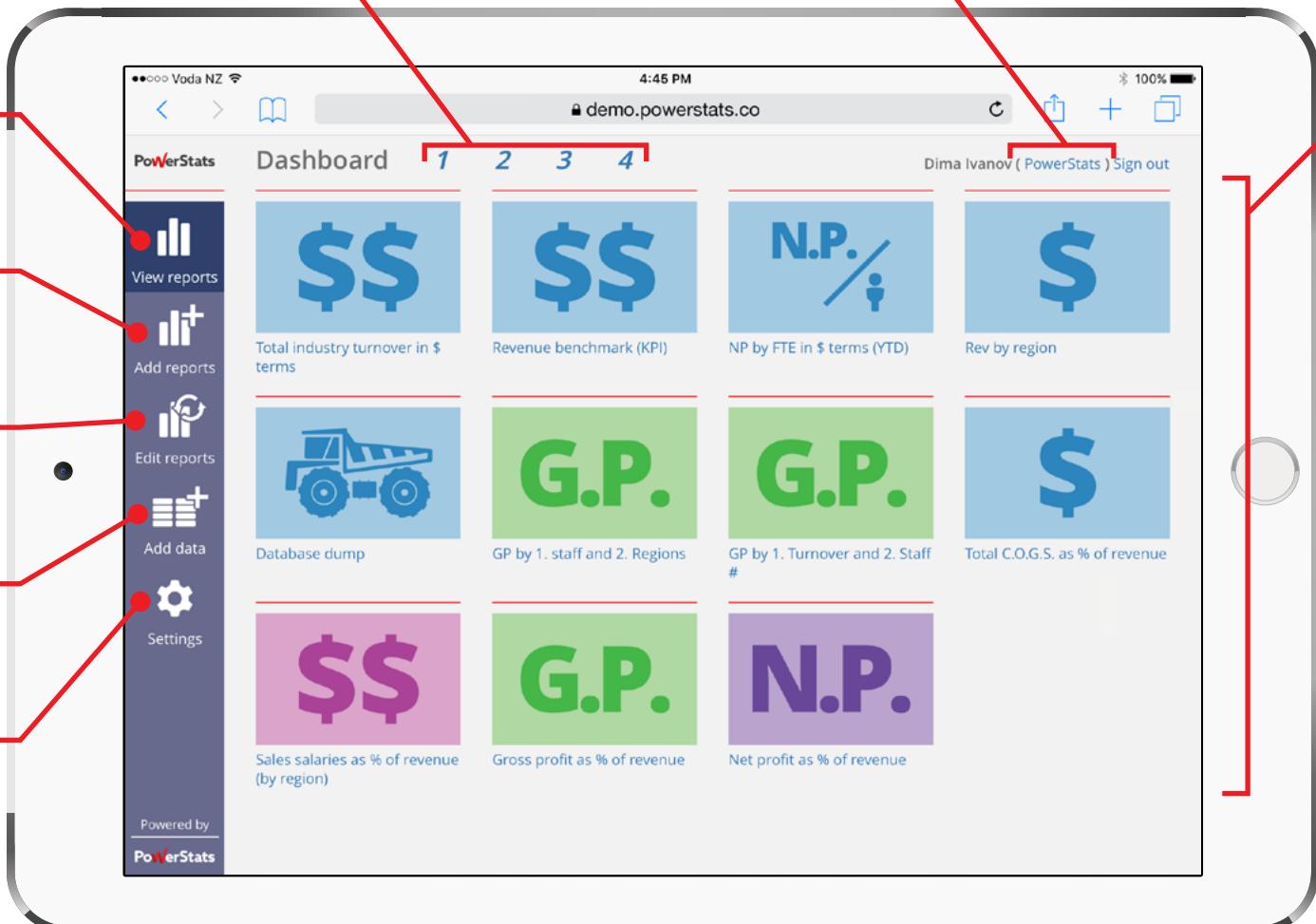
**Go back to the dashboard**

**Add new reports here \***

**Edit your reports here \***

**Add your data here \***

**Everything else is here**



\* These tiles may or may not be visible to you, depending on your permissions

\*\* If you can "switch" between accounts, click on this blue hyperlink

# ADDING YOUR DATA

Before we can show you insightful reports, we need to collect and aggregate a lot of data.

In most cases, before we can generate reports, this data needs to be entered into PowerStats by you and the other companies participating in your PowerStats project.

Depending on the set up of your project, you can add your data by:

1. Typing it into text fields and drop-down boxes, or
  2. Uploading it using a standard Excel file

Also, your data can be added automatically via an API, or, an agency that you are a client of is already providing your data into our system. In either of these two latter cases - you don't need to do anything, as we already have your data. You can [skip this section](#). Easy!

Read on for a short overview of adding data.

# TYPE YOUR DATA IN, or,

**Step 1:** Click on the ADD DATA tile

**Step 2:** Select the date of your data

**Exact data requirements specification \***

Description:	Value
Include total sales for quarter excluding GST	3,036,924.36
\$NZD (GST excl.)	3,276,061.58
\$NZD (GST excl.)	1,109,209.56
\$NZD (GST excl.)	166,852.02
\$NZD (GST excl.)	1,308,984.15
\$NZD (GST excl.)	311,860.68
\$NZD (GST excl.)	329,225.70
\$NZD (GST excl.)	140,807.29
Hours	55.31
Quotes	153.10
Quotes	57.70

**Step 3: Enter your data into required fields**

**Step 4: Submit your data into PowerStats**

Check your figures against previous data \*

# UPLOAD A FILE

**Download a blank file to add your data to**

**Read these notes to prep your data**

**Steps 1 and 2: Make required selections**

1. Brand of the data being added:  
Multiple Brands

2. Data being added is sold by:  
Multiple Distributors

3. Interval when the sales took place:  
Feb - 2016

4. Select the file to be uploaded:  
Select

Blank template file      Explanatory note      Cancel      Add data

**Step 3: Select the date of your data**

**Step 4: Find the Excel file with your data**

**Lastly, upload your Excel file**

\* These items may or may not be available, depending on the set up of your project



# CREATING AND EDITING REPORTS

There are three types of reports that you can work with inside PowerStats:

## 1. A “standard” report

These powerful, highly-flexible, customisable reports allow you to interact with the data right inside PowerStats (change time-range, graph types, comparisons, filters etc).

## 2. A “database dump” report

This report simply “dumps” all of the data that is available to you into a .CSV file. You can then import this file into an ERP software, or analyse it with pivot tables in Excel, etc.

## 3. A “custom” report

Your business needs may go beyond our standard reports, or, you may be used to legacy reports from an earlier stats system. In either case, we can develop highly-customised reports to help you make better business decision, faster.

Before showing you how to create standard reports (being the only report type you can create), let’s see how to differentiate these types of reports from each other:

# Standard reports, and,

The screenshot shows a PowerStats dashboard titled "Total industry turnover in \$ terms". It features a stacked area chart representing quarterly turnover from Q1 2012 to Q4 2015. The Y-axis ranges from \$0 to \$15M. The legend lists several companies: Capture Associates, Hugh and Co., Jackson Matches, Seven Points, Synergy International, Top Fusion, and Western Media Corporation. A specific data point for Q3 2014 is highlighted with a callout: "Q3 - 2014 + Capture Associates: \$587,446.9 (5.46%)". Above the chart are filter controls: "From the start of:" (Q1 - 2012), "To the end of:" (Q4 - 2015), "Intervals:" (Quarter), "Compare with:" (Disabled), and "Distributor filters: Tag Filters" (Active). Below the chart are buttons for "Edit graph" and "Data status: Partial". To the left is a sidebar with options: View reports, Add reports, Edit reports, Add data, and Settings.

**Set defaults to pre-configure the report**

**Compare data from different time-ranges**

**Change the graph type in seconds**

**See how complete the data is**

**Adjust FROM / TO dates, and INTERVALS**

**Segment data with just one or many filters**

**Interactive mouse-overs for quick facts**

**Export to Excel, PDF, or receive both by e-mail**

**Graphs take up the full size of your screen**

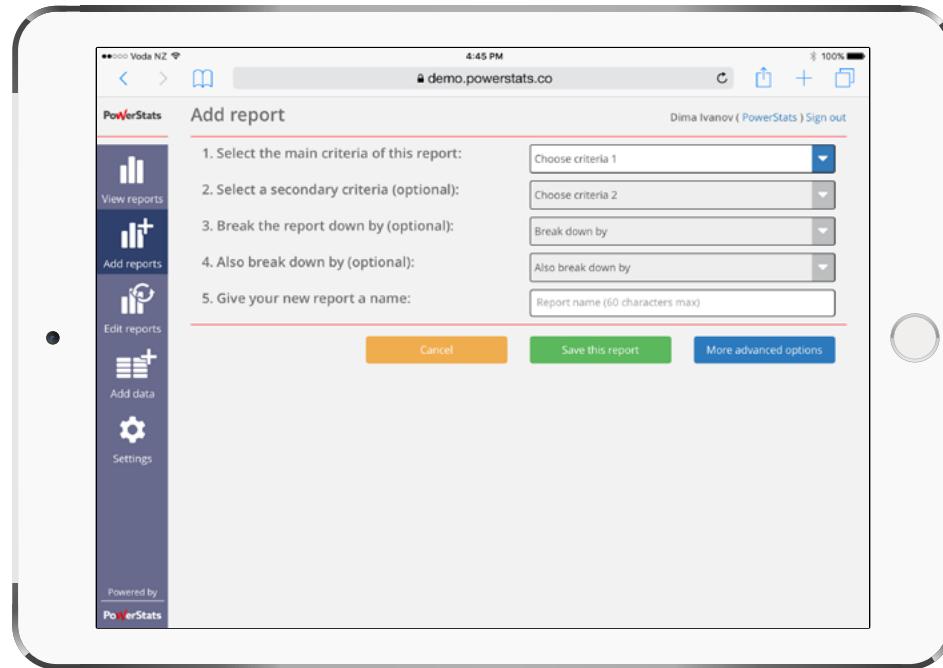
# database dump / custom

The screenshot shows a mobile phone displaying a "Database dump" screen. The screen has two main sections: "From the start of:" (Q4 - 2015) and "To the end of:" (Q4 - 2015). Below these is a green "Download" button. To the left of the phone is a sidebar with options: View reports, Add reports, Edit reports, Add data, and Settings. The phone's status bar shows the time as 4:45 PM and the battery level at 100%.

**Step 1: Select FROM and TO dates**

**Step 2: Download a .CSV file**

# CREATE A REPORT



If you can see the “Add reports” tile on the left, you are able to create, edit and delete standard reports. Since each report can be highly customised, a large selection of reports will help you analyse data QUICKLY. The settings saved here simply define how the report opens by default.

Remember, a report is simply a “window” to the data - editing or deleting a report doesn’t change any data.

The below numbering follows PowerStats’ interface:

## 1. Select the main criteria

This defines the TOPIC of the report. What data are we looking at? You must select something here. *NB: if your project only measures one criteria, this will be pre-selected*

## 2. Select a secondary criteria

If you wish to simultaneously compare two criteria (e.g. sales of apples to sales of oranges), you can select a second criteria here.

## 3. Break the report down by...

Make a selection here to define HOW your report is broken up. Keeping with apples, do you want to look at sales of big vs small apples (i.e. size), or green vs red (i.e. colour).

## 4. Also break the report down by...

Interested in a finer cross-section of your market? Want to see how much market share “big AND green” apples take up? Use this secondary option.

## 5. Name your report

Use a name that’s easy for you to recognise.

Once you’ve done the above, click “Save” and you’re done! But if you want more customisation, read on...

# CUSTOMISE A REPORT

The screenshot shows the 'Add report' page of the PowerStats application. On the left, a sidebar menu includes 'View reports', 'Add reports', 'Edit reports', 'Add data', and 'Settings'. The main area contains 17 numbered steps for report configuration:

- Select the main criteria of this report: Choose criteria 1
- Select a secondary criteria (optional): Choose criteria 2
- Break the report down by (optional): Break down by
- Also break down by (optional): Also break down by
- Give your new report a name: Report name (60 characters max)
- Select an icon for the dashboard: \$ (selected)
- and additionally, choose a color theme: Blue
- In addition to points 3 and 4 above, you can define your filters now. Doing so will exclude certain data from this report (by default, all data is included). Leave "Inactive" to include all data, or, set your filters below:  
Distributor filters: Inactive  
Tag Filters: Inactive
- Select the default intervals for this report: Quarter
- Define the default time range for this report below:  
From the start of: 3 years back  
To the end of: Last quarter
- Do you want this to be a "Comparison report"? If yes, choose the start of the comparison time range:  
No comparison
- Select external data (if available) to display:  
No external data
- Set additional options for external data:  
Set external data options
- Select data overlays (if available):  
No overlay data
- Set additional options for data overlays:  
Set data overlays options
- Define which series are displayed by default:  
Select display defaults
- Give your report a short description (shown next to the report name): Please tell us what this report is about
- Select a default graph type: Bar chart (selected)

At the bottom are three buttons: 'Cancel', 'Save this report' (highlighted in green), and 'Less options'.

If you click the blue “More advanced option” button next to the “Save” button after Step 5, here are the customisation options that will become available to you:

## 6. Select an icon for the dashboard

All reports on the dashboard have an icon to help you find them quicker. Select your favourite icon here - there's usually quite a selection available. Additionally, you can select a colour for your icon too - this can help you quickly distinguish your reports from one another (e.g. All “unit” reports are blue, all “\$-value” reports are red etc).

## 7. Pre-set your filters

Let's assume you only sell red apples, and have no interest in any other colours. Using these filters, you can exclude all apples apart from red, so when your report opens, it ALREADY looks ONLY at red apples (saving you time). The same thinking can apply to any filters inside your project - for example, you could pre-set your filter to all red apples (excluding other colours), grown organically (exclude GM), which are exported (exclude domestic sales).

## 8. Select the default intervals

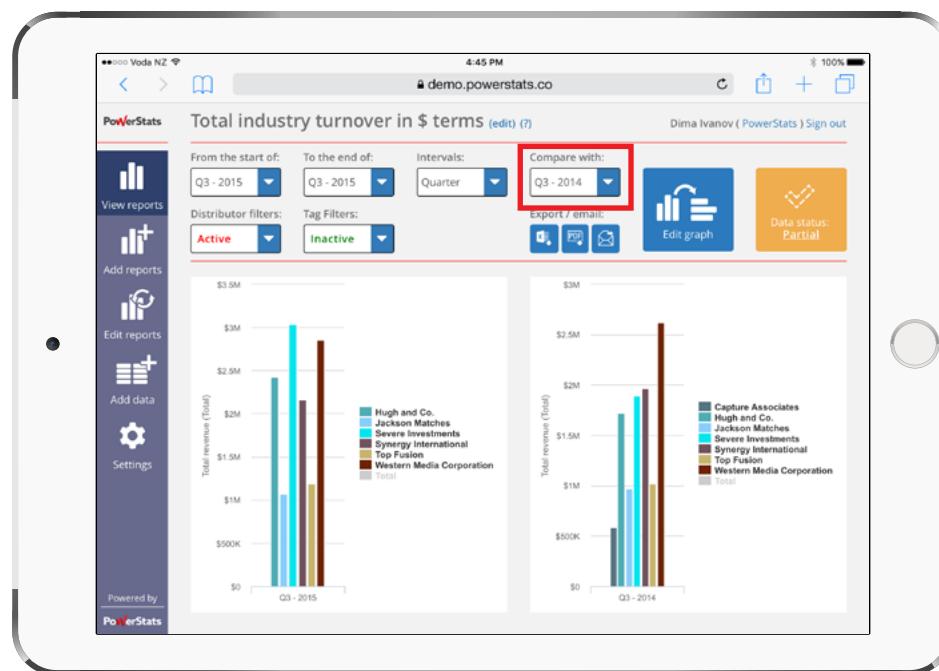
Do you want to look at this report “by month”, “by quarter” or by “Financial year (Starting April)”? There are other project-specific options too. Choose the default interval here. Remember - you can always change it later!

## 9. Define the default time-range

Use this step to set the “From the start of:” and “To the end of:” fields of the report. Make your choices dynamic (e.g. from 1 year back), year-to-date (e.g. from last January) or static (e.g. from May 2015).

## 10. Is this a comparison report?

Say you wanted to compare your performance this year so far (year-to-date) with the same period last year. Select “one year back” in this step 10 to make the report load with a comparison by default. Example of a comparison report is shown below - the graph area is split into two:



## 11. Select external data (if available)

Your project may or may not work with external data (e.g. your project looks at “apple production” - external data can be “average monthly rainfall”). If you want external data superimposed on this report, define it here.

## 12. Additional options for external data

Use this step to hide or show external data by default, and choose which axis it appears on (main, secondary or new)

## 13. Select data overlays (if available)

Using “Data overlays” allows you to compare various data on one screen, and is quite useful for deeper analysis.

## 14. Additional options for data overlays

Same as external data - define the display defaults here.

## 15. Select display defaults

Do you want the “Total” to be displayed on this report? Or the “Median” and “Mean”? Define these settings here.

## 16. Give your report a description

You might want to write a few words about this report, so you and your colleagues can understand its significance.

## 17. Select a default graph type

Define your favourite graph here using available options.

# EDIT A REPORT

Good news - you can edit standard reports as easily as you can create them! Editing an existing report provides you with identical controls to those that we have just looked at for "[creating new reports](#)".

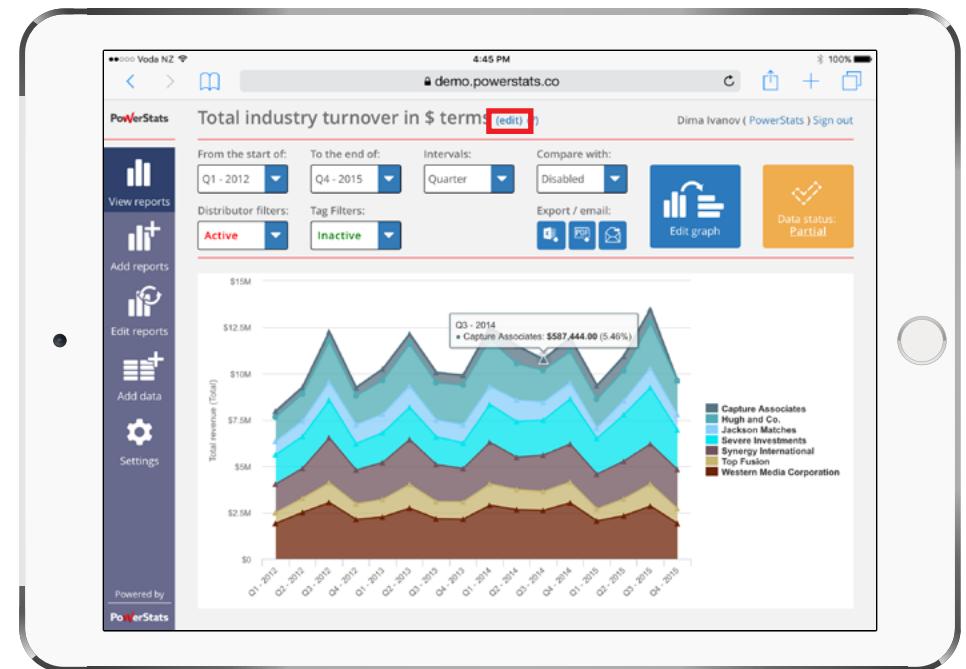
To edit a report, click on the "Edit reports" tile on the left, find the report you want to edit, and click the green "Edit" button. Or if you don't need the report anymore, just delete it! Deleting a report won't affect any data.

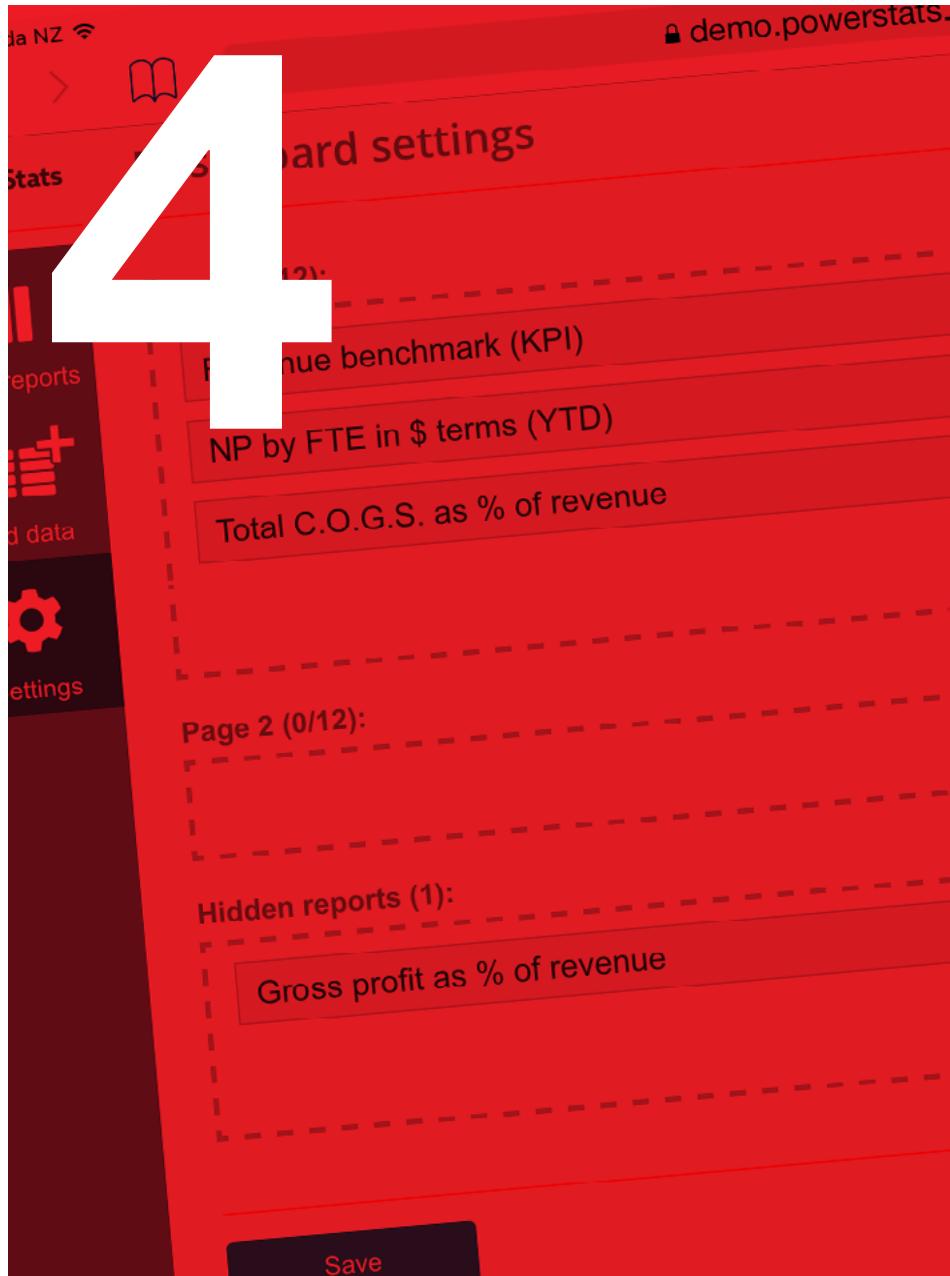
The screenshot shows a mobile application interface for PowerStats. On the left, a vertical sidebar menu includes 'View reports', 'Edit reports' (which is highlighted with a red box), 'Add data', and 'Settings'. The main content area is titled 'Edit reports' and lists ten reports with two actions per report: 'Edit' (green button) and 'Delete' (red button). The reports are:

- (test report - don't remove)
- COGS (by turnover)
- Dir lab costs
- Dir mat vs np
- GP
- GP by 1. staff and 2. Regions
- GP by 1. Turnover and 2. Staff #
- GP vs NP (scatter)
- Gross profit as % of revenue
- Net profit as % of revenue
- NP by FTE in \$ terms (YTD)
- Number of staff

Alternatively, you can just click on the word "(edit)" next to the report's name, while you are viewing it.

Please note: if you didn't create the report, you may not have the ability to edit it - in which case you won't see the "(edit)" link.

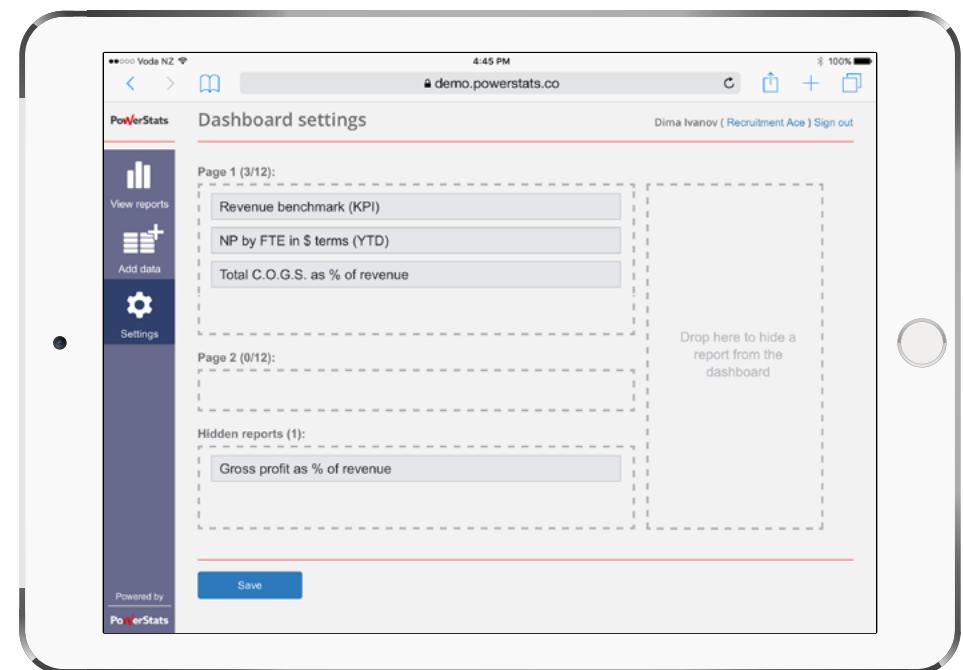


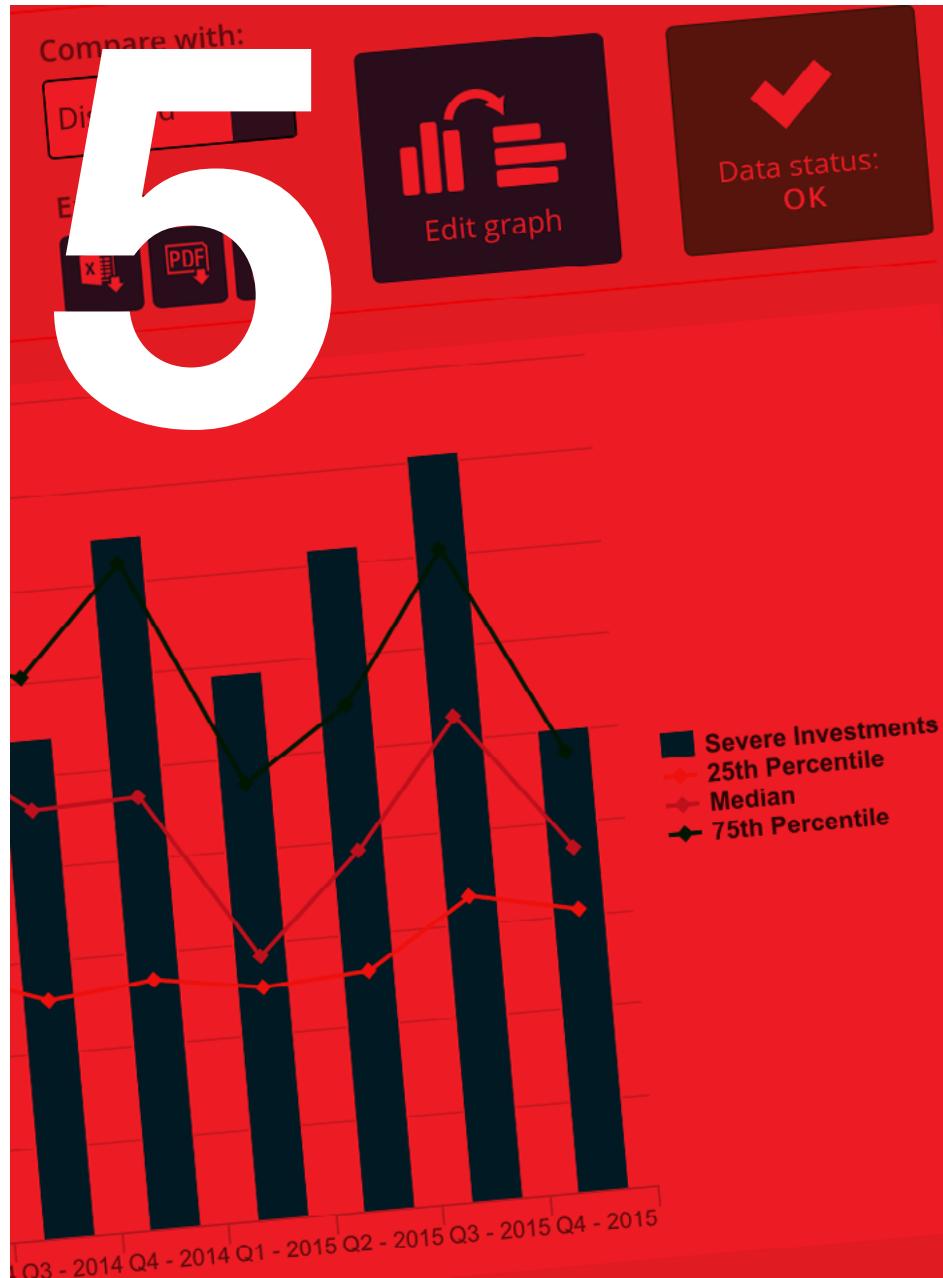


# ARRANGING REPORTS ON YOUR DASHBOARD

It's very easy to customise the order of your reports on your dashboard - including which pages the reports appear on. You can group your reports into as many pages as you like, or, hide reports that you no longer use.

1. Click “dashboard settings” in SETTINGS,
2. Drag-and-drop your reports to arrange them,
3. and lastly, don’t forget to click SAVE!





# VIEWING REPORTS

As mentioned in “[Creating reports](#)”, there are three types of reports that you can work with in PowerStats - and this section applies only to “standard” reports.

Here are the actions you can take while viewing standard reports (all other actions can be done by “Editing”):

- view the report’s description
- adjust the time range
- change the intervals
- turn the comparison on and off
- set one or many filters
- export your data to Excel or PDF
- email the report to yourself as an attachment
- change the type of graph used to display your data
- check the “Data status”
- using mouse-overs for quick facts
- turn data series on and off by using the legend

The following pages address each of the above points.

Firstly, let’s look at data confidentiality and disclosure.

# DATA CONFIDENTIALITY AND DISCLOSURE

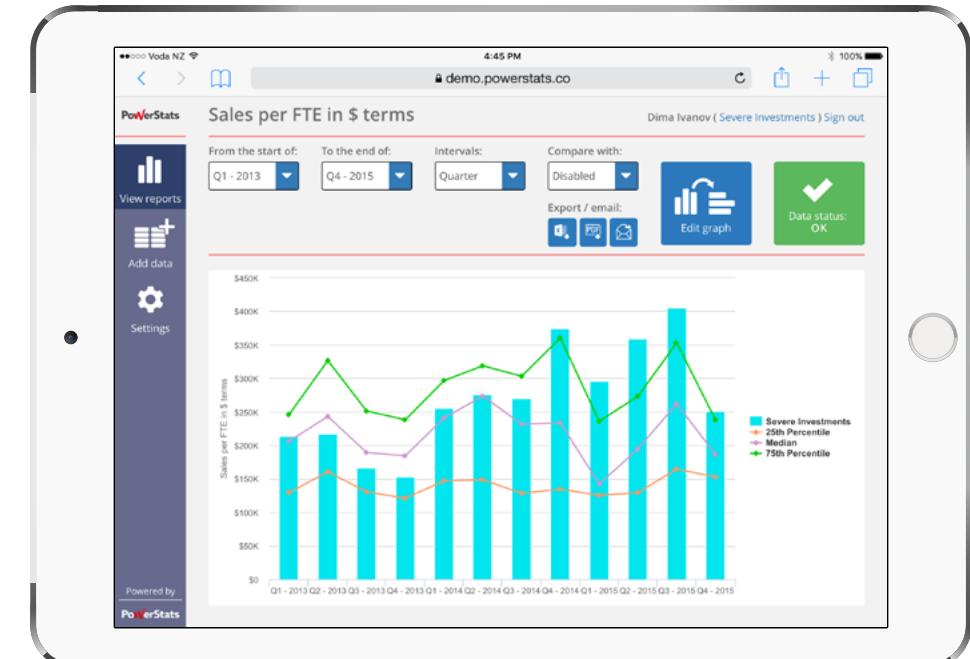
Lawfully sharing data for the benefit of all participants is the fundamental objective of the PowerStats platform.

However, sometimes, due to your project's specification (or if required by law in your country or region), we will prevent the disclosure of certain types of data. Usually, this is limited only to data that can identify YOU - i.e. brand of the item sold or the name of your business. This "Limited disclosure" can be temporary (e.g. keep brands/companies confidential for 3 months), or permanent.

In other cases, and as permitted by law, participants may wish to share their sensitive business data immediately and in full (i.e. "full disclosure"). Superusers - or project administrators - often have unlimited access to all data.

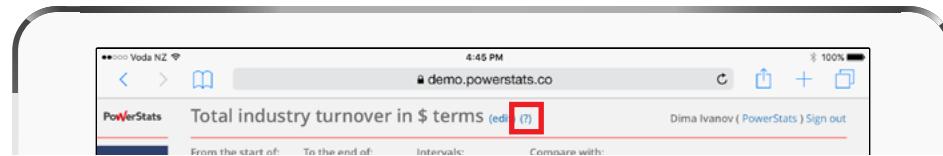
Top screen to the right shows a "superuser-view" with access to all companies' data - the lower screen shows a "company-view", where only "our data" and some averages are shown. Both screens show the same report.

(NB: please refer to our General Terms of Use, especially clause 4, for full details on what happens with your data)

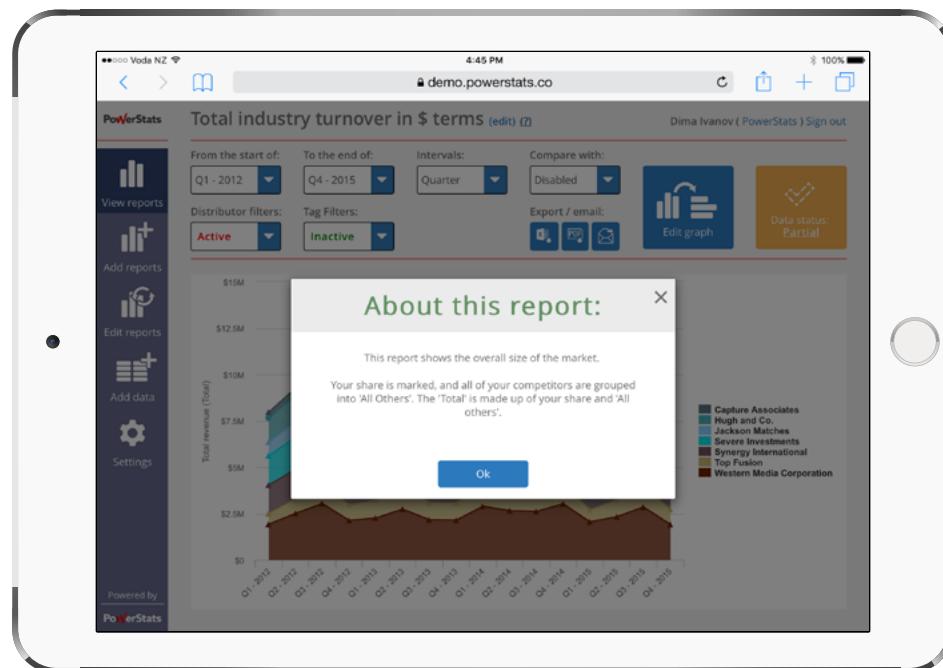


## View the report's description

If a description is available for a particular report, it'll appear as a "(?)" next to the name of the report up top. This description could help you understand the data.

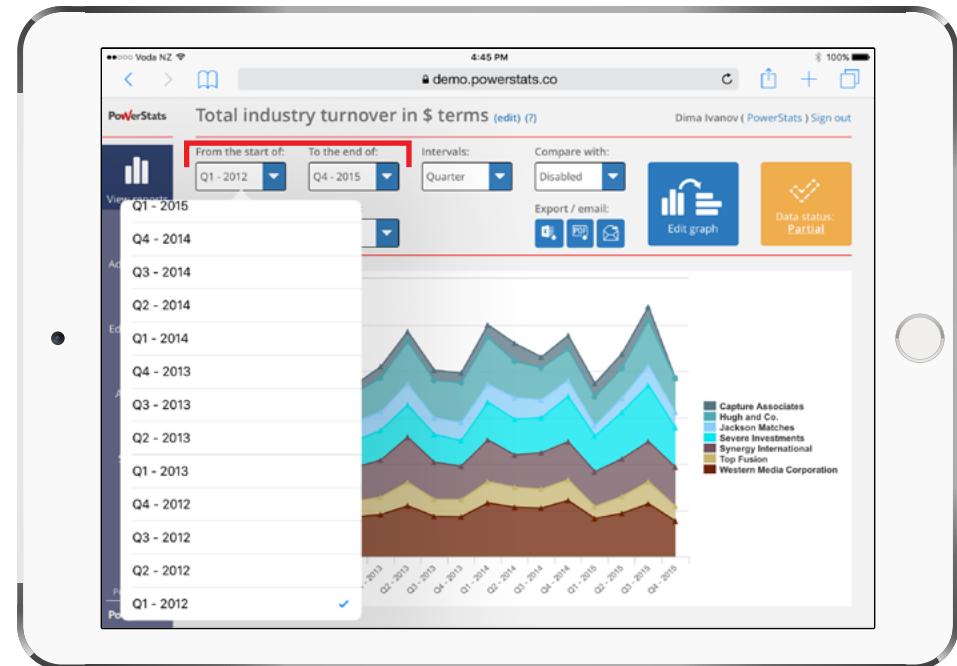


Clicking on this "(?)" will bring up the description:

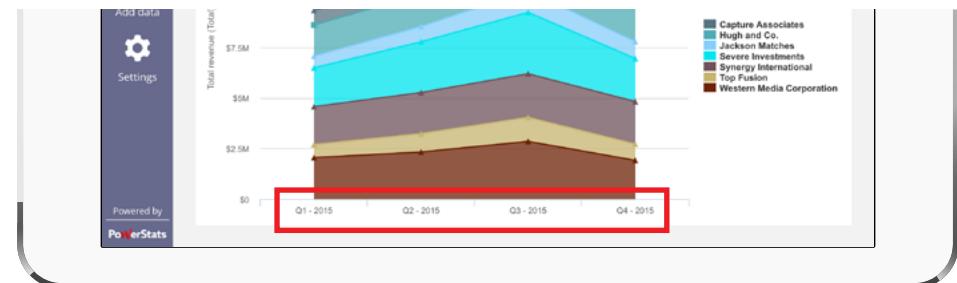


## Adjust the time range

Standard reports aren't fixed in terms of what time range they look at. You can look at just one month, one year, or many years - whatever you find useful!

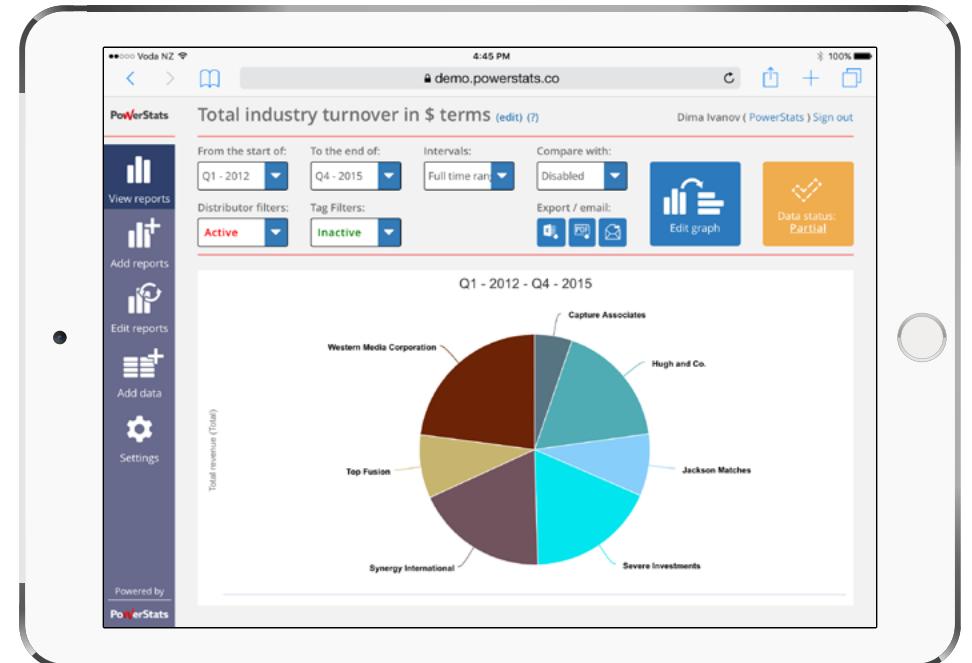
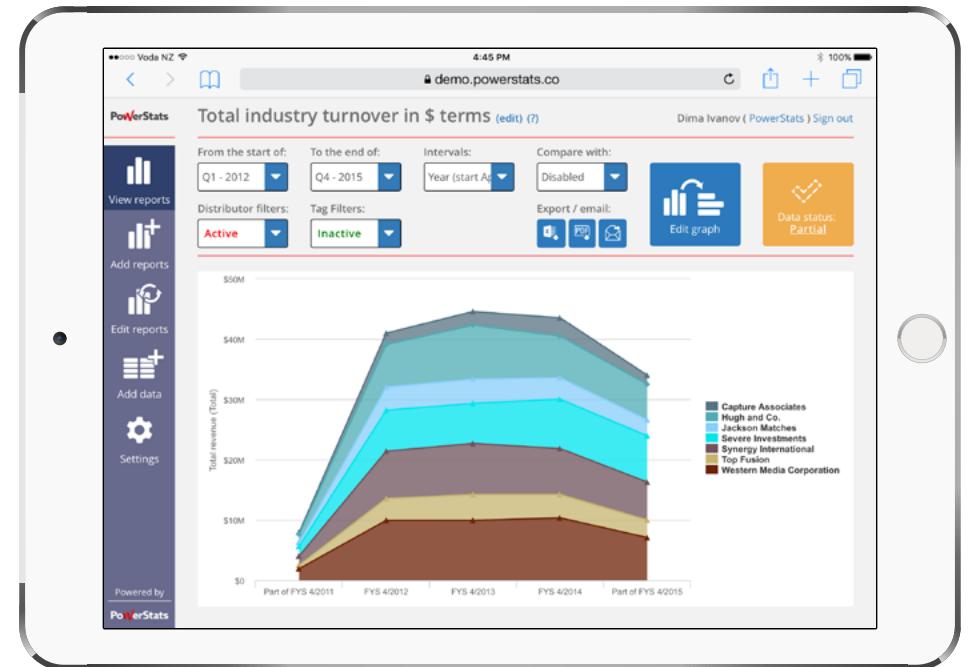
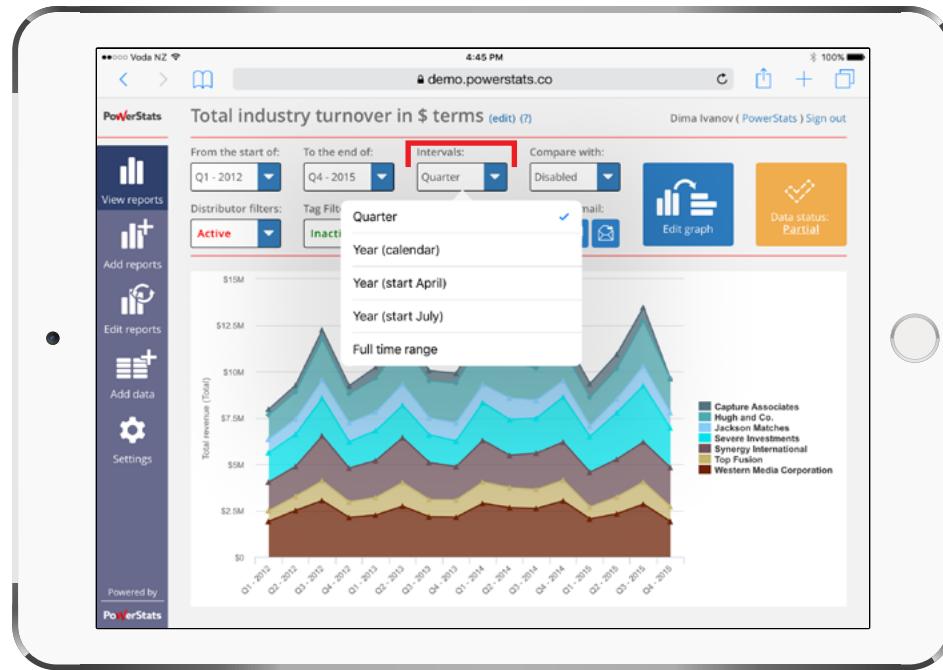


Changing the "From" selection to "Q1-2015" will look like:



## Change the intervals

Use this adjustment to define the intervals used to display your data. Basically, this setting “combines” many smaller intervals into bigger chunks (e.g. months into years).



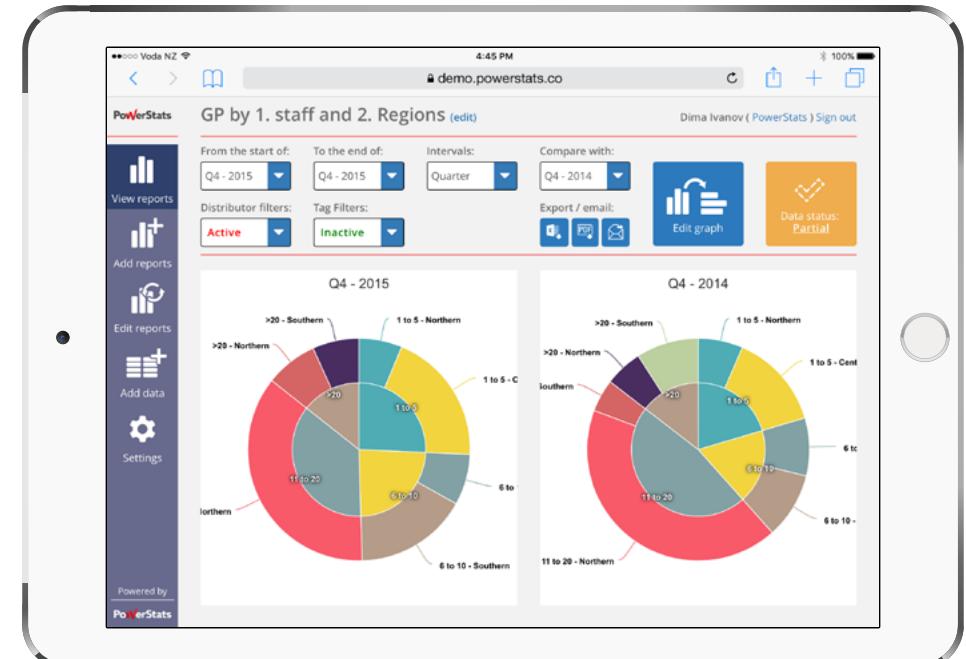
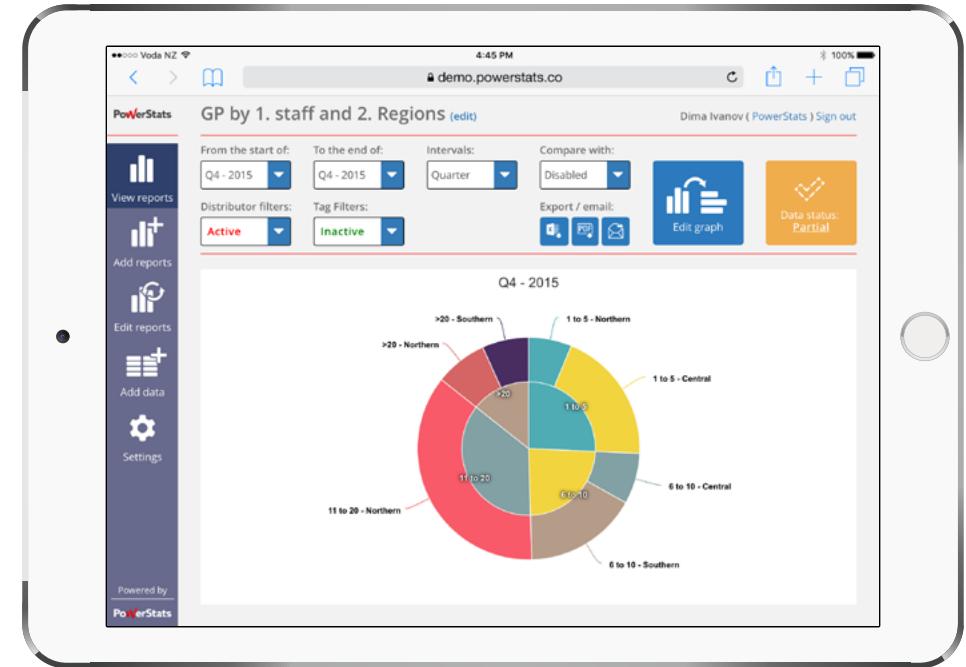
Our demo project collects data by quarter, which is the “data collection interval” - your data collection interval may be “month”, for example.

To the right, we change interval to “Year (start April)”, and on the bottom, to “Full time range”. Remember - the data is the same in all 3 screens - it’s just displayed differently:

## Turn the comparison on and off

If you need to compare data with an earlier time range, you can do this easily with just two clicks!

The screenshot shows the PowerStats interface on a mobile device. The main screen displays a donut chart with segments labeled '11 to 20 - Northern' (red), '6 to 10 - Central' (brown), '1 to 5 - Northern' (yellow), and '1 to 5 - Central' (teal). Above the chart are several filter and report configuration buttons. A red box highlights the 'Compare with:' dropdown menu, which is currently set to 'Disabled'. Below this menu, a list of time intervals is visible, starting from Q4 - 2015 and ending at Q1 - 2013. The 'Active' and 'Inactive' distributor filters are also shown.



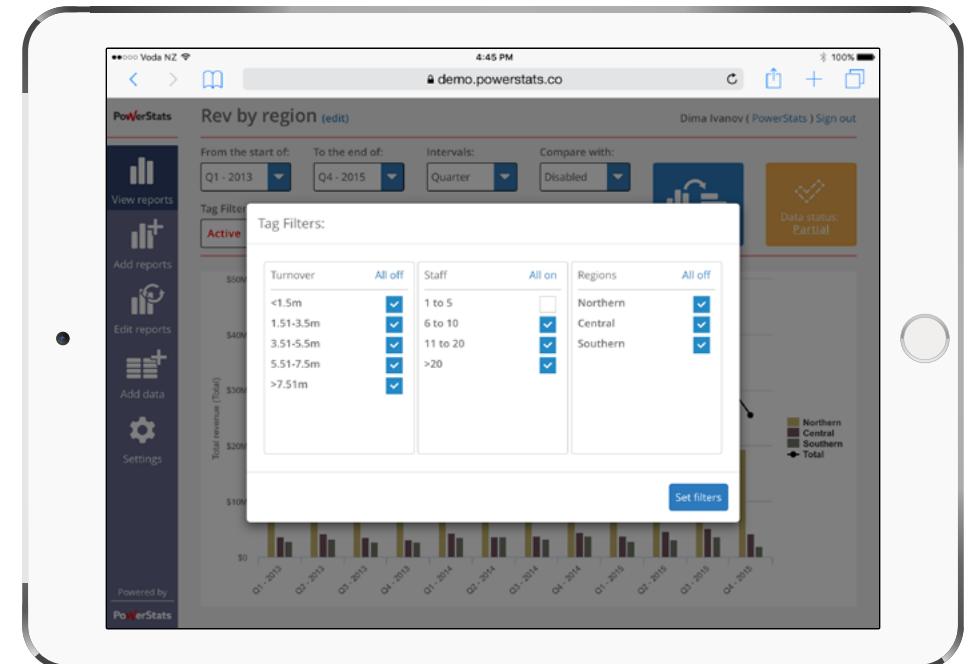
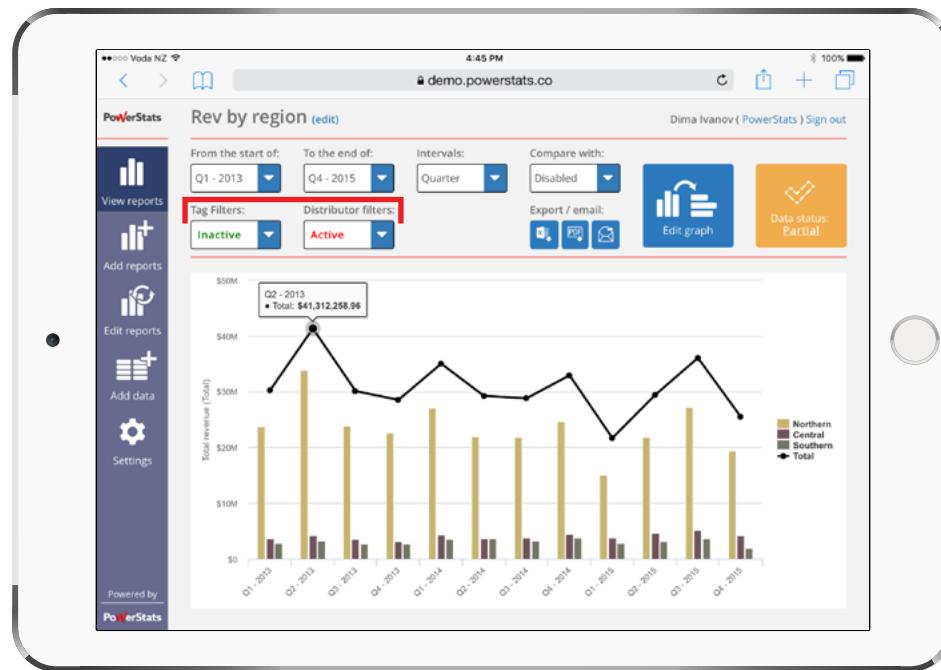
Selecting an interval in the “Compare with:” drop down will define the START of the comparison time range, which will appear on the right half of the screen. The END of the comparison time range is set automatically to copy the length of the primary time range.

To the right, the bottom screen shows a “comparison report” version of the original screen (the top screen).

## Set one or many filters

You may have a particular interest in a narrow segment of your entire market, or, a certain geographical location.

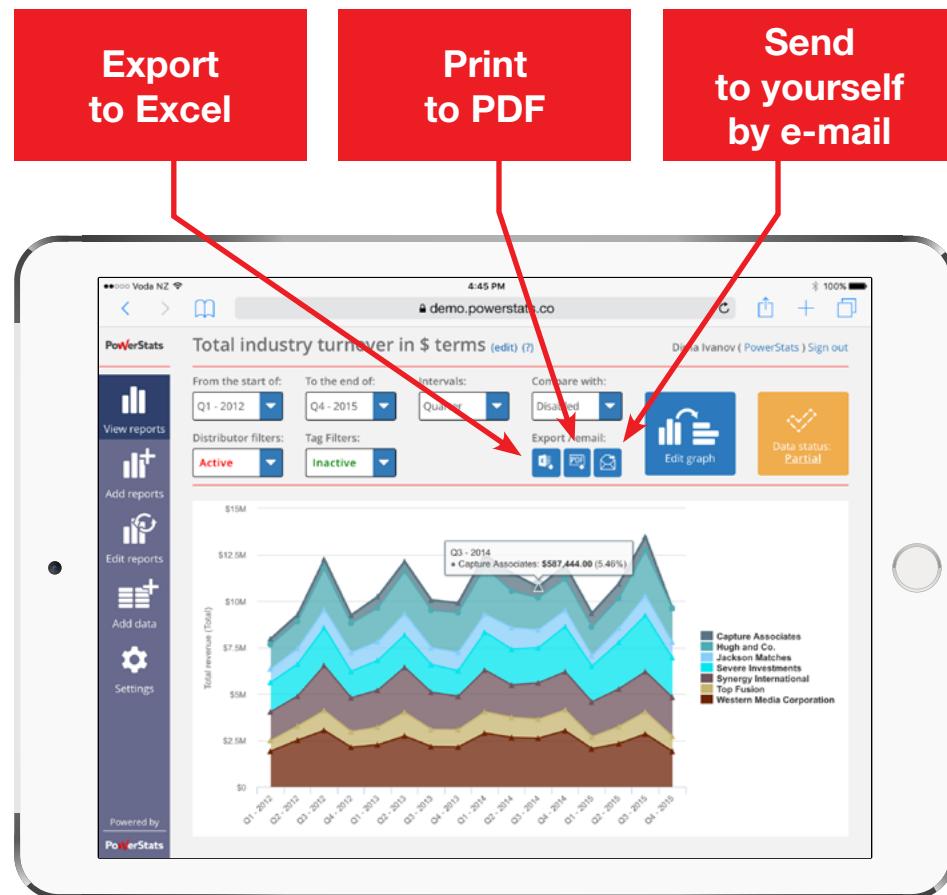
You can use a filter, or combination of many filters, to narrow down the data that is DISPLAYED in a standard report. Simply click on the filter you wish to adjust, and de-select any items you wish to EXCLUDE from the data.



As you see above, there's a total of \$41.3m in revenue for Q2-2013. Then, (top-right), we remove all companies with less than 6 staff. As a result, the revenue drops to \$37.6m, meaning companies with 1-5 staff make up for \$3.7m.

## Export data to Excel or PDF, or, email the report to yourself as an attachment

There may be times you need to analyse the data further, or just want to see it in a table format. You can download any standard reports as an Excel file, print it to PDF or send it to yourself by e-mail - all accomplished with just one click of a button!

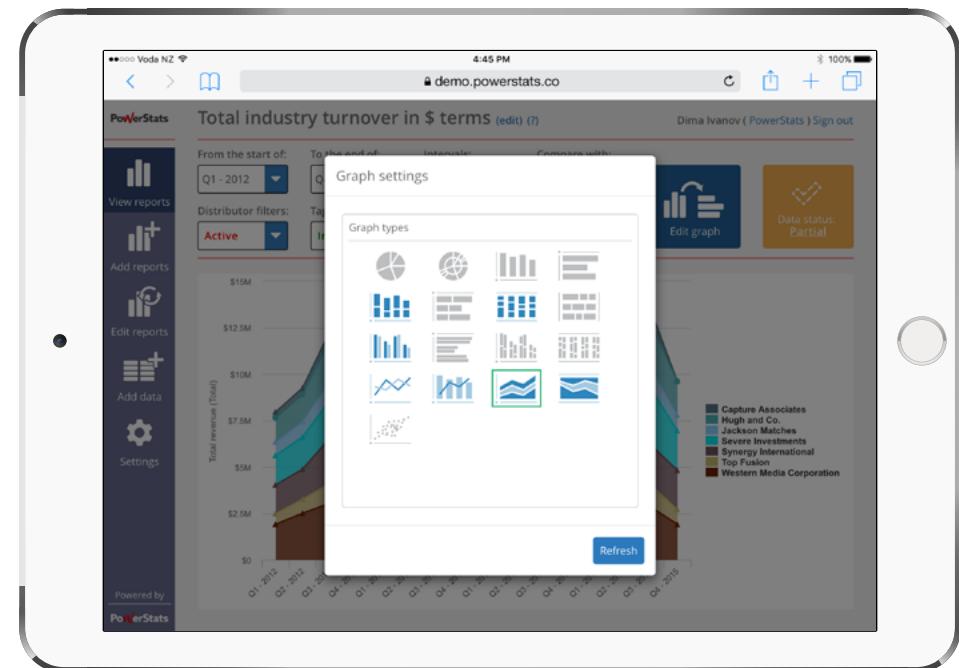


## Change the type of graph

Often, a different type of graph can do a better job of explaining the same data. Remember: changing the graph type doesn't change any data, it's just displayed differently.

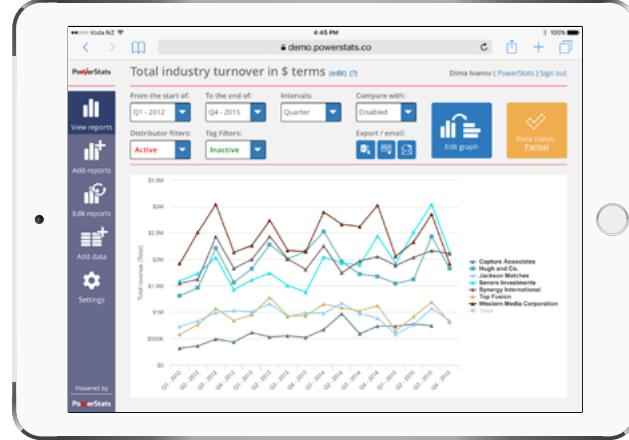
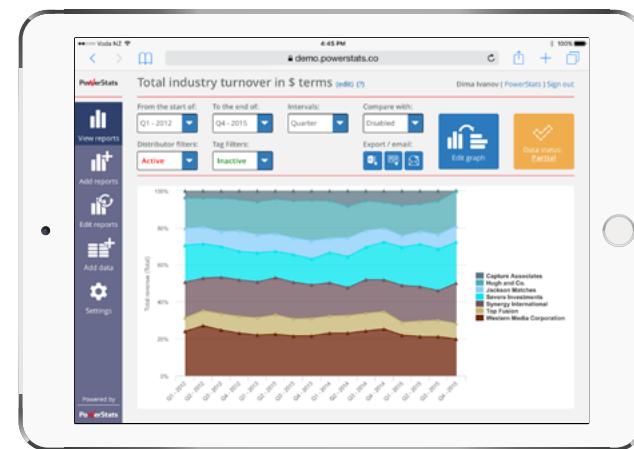
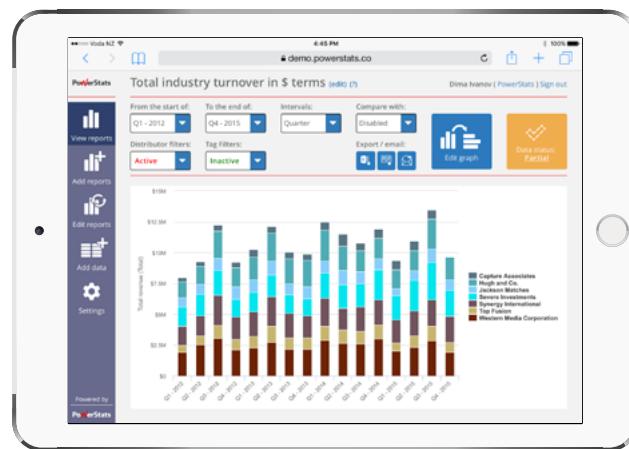


Clicking "Edit graph" we can see the available graph types:



## Same data - same report - different graphs!

The 6 screenshots on this page are all of exactly the same report and the same data as shown on the previous page - they are, however, using different graph types:

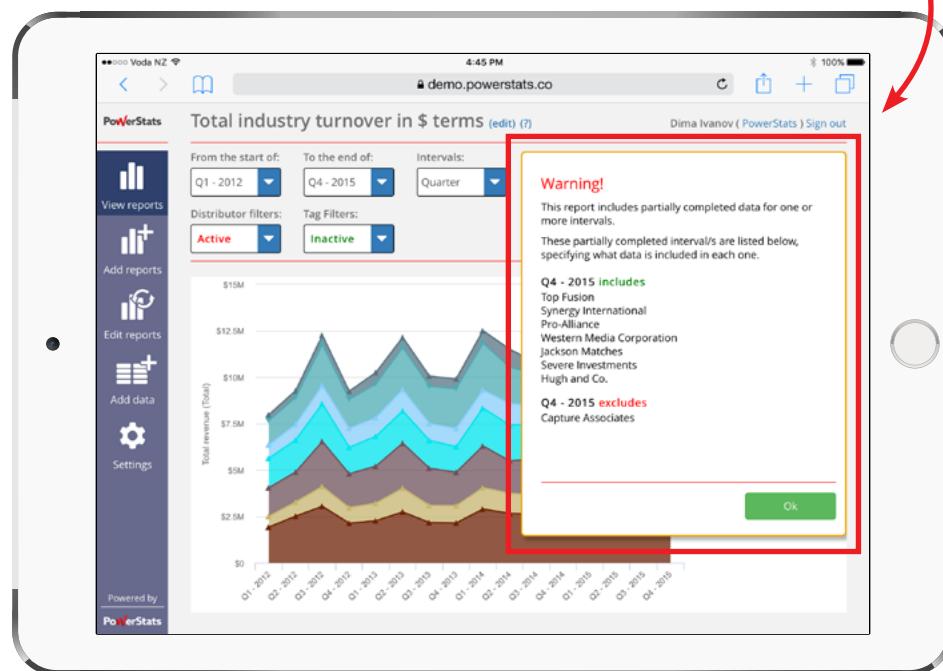


## Check the “data status”

Depending on your project’s set up, you may or may not see this tile coloured in orange. If you do, you can click the DATA STATUS tile to see how complete the data is.



See whose data is missing from which intervals:



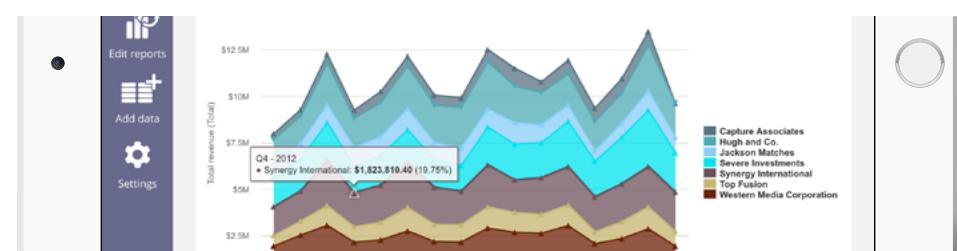
## Using “mouse-overs” for quick facts

If you only need to obtain one or two numbers from a particular graph, you can usually get these by simply hovering your mouse above a point on the graph (or if you’re using a touch-enabled device, touch a point).

The mouse-over pop-up usually contains all the key data such as: name of what you’re looking at, time, value and percentage share of total (if applicable).

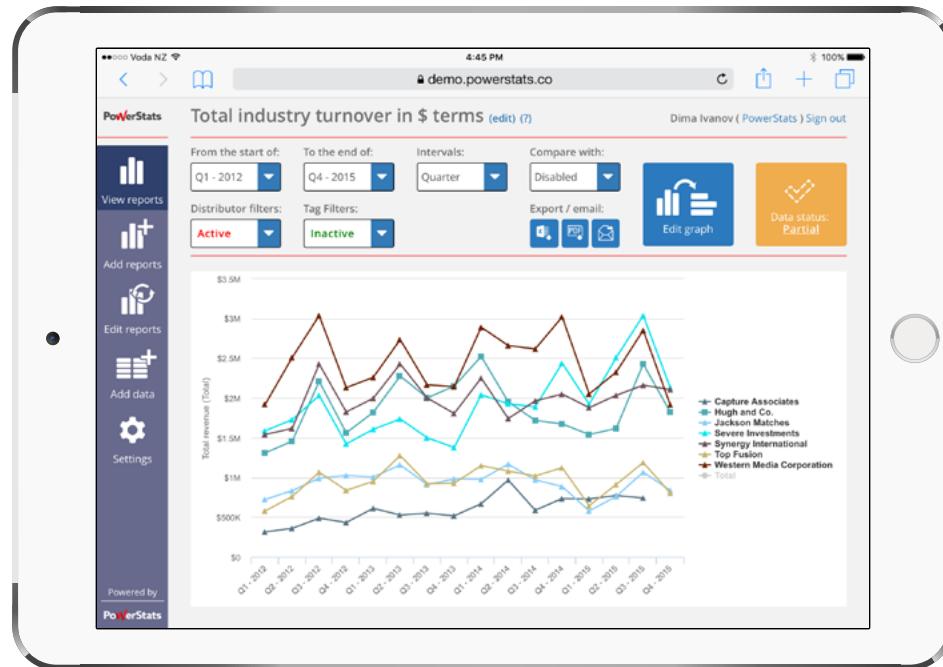


Selecting another point shows you other data:

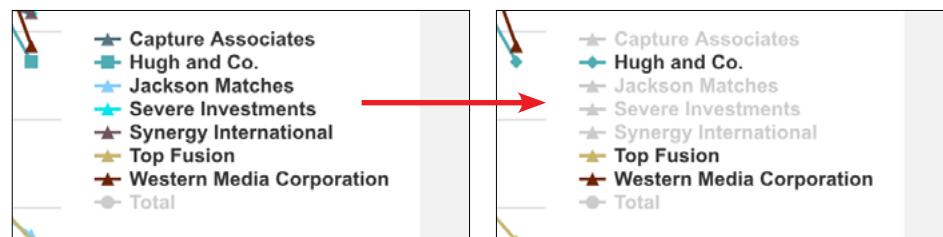


## Turn data series on and off by using the legend

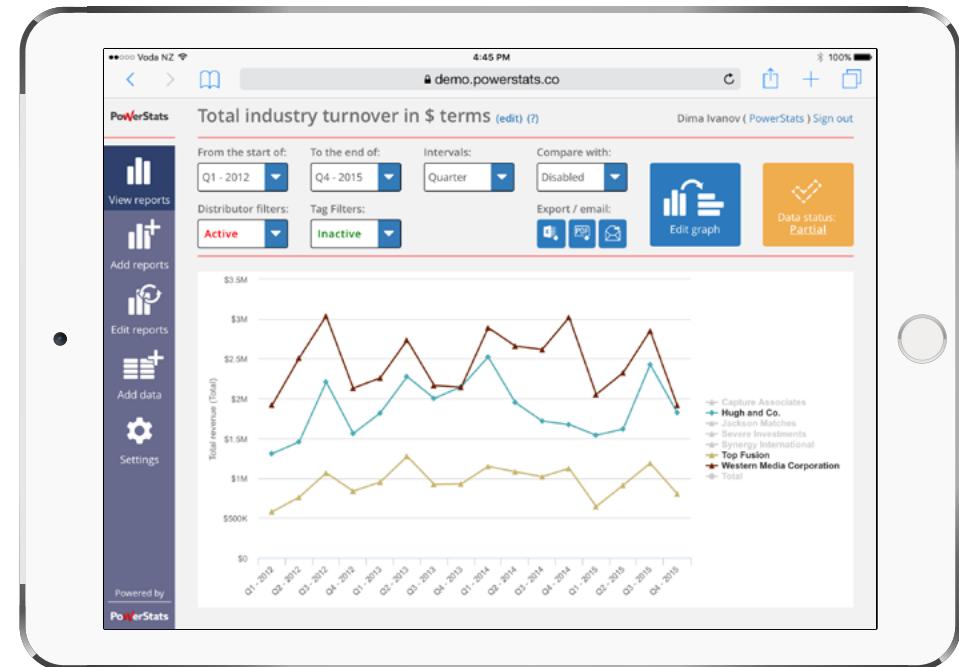
By default, all of the series are shown on a given report (saying this, you can show/hide “All others” and “Total”). Having a lot of series on one graph can clog it up, and make the graph a little difficult to understand:



De-selecting 4 series from the original line graph leaves only the 3 lines that are of interest to us:



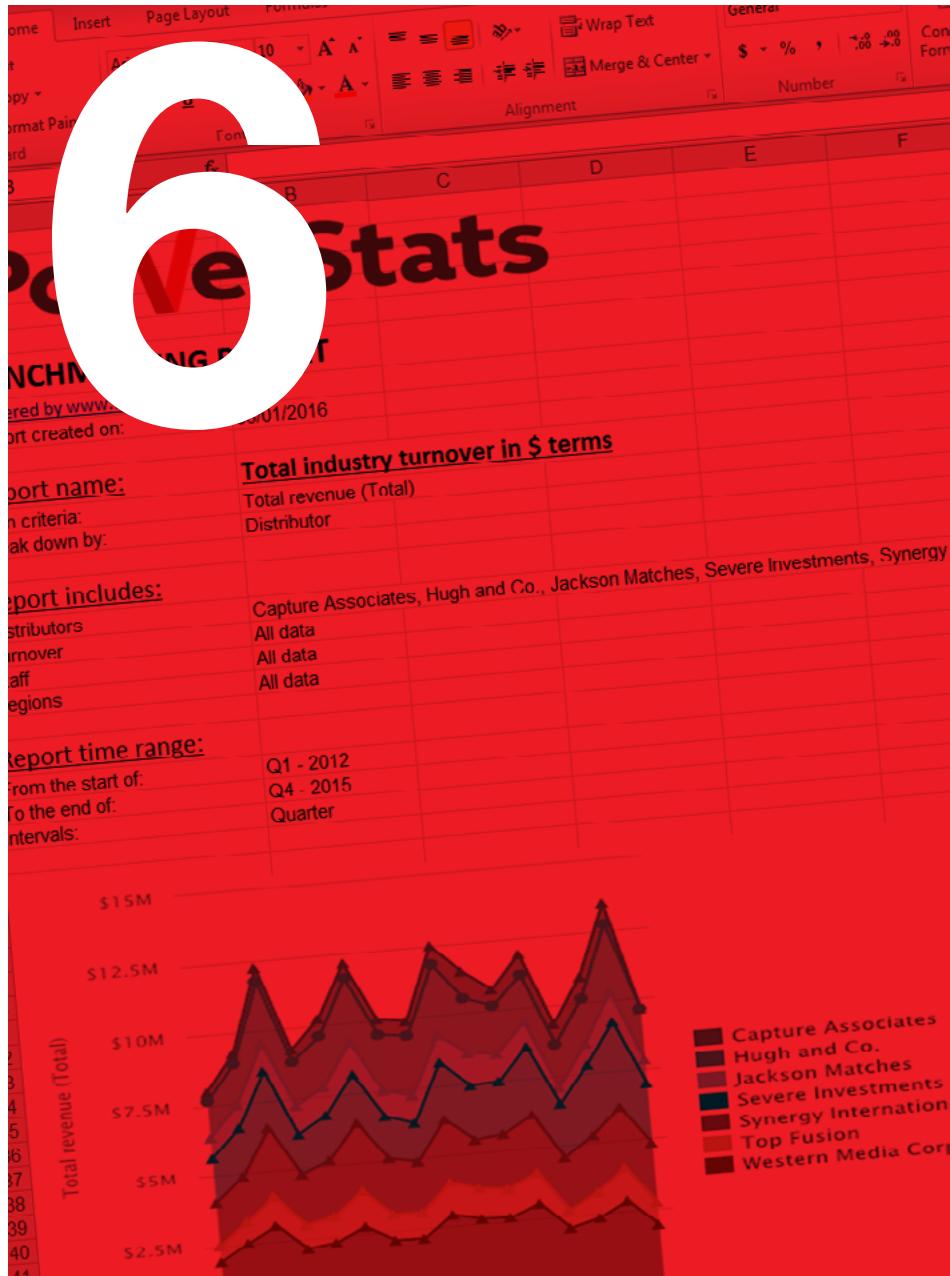
With the four lines removed, the graph is now easier to read:



**BE CAREFUL:** turning off a series simply hides it - but hidden series still count towards AVERAGES and TOTALS.

The rule is - if you can see the name of the series in grey in the legend on the right - it COUNTS towards averages and totals.

To make a series NOT count towards averages and totals, you must exclude the relevant series using filters (how to do this is covered in “[Set one or many filters](#)”).



# EXPORTING TO EXCEL

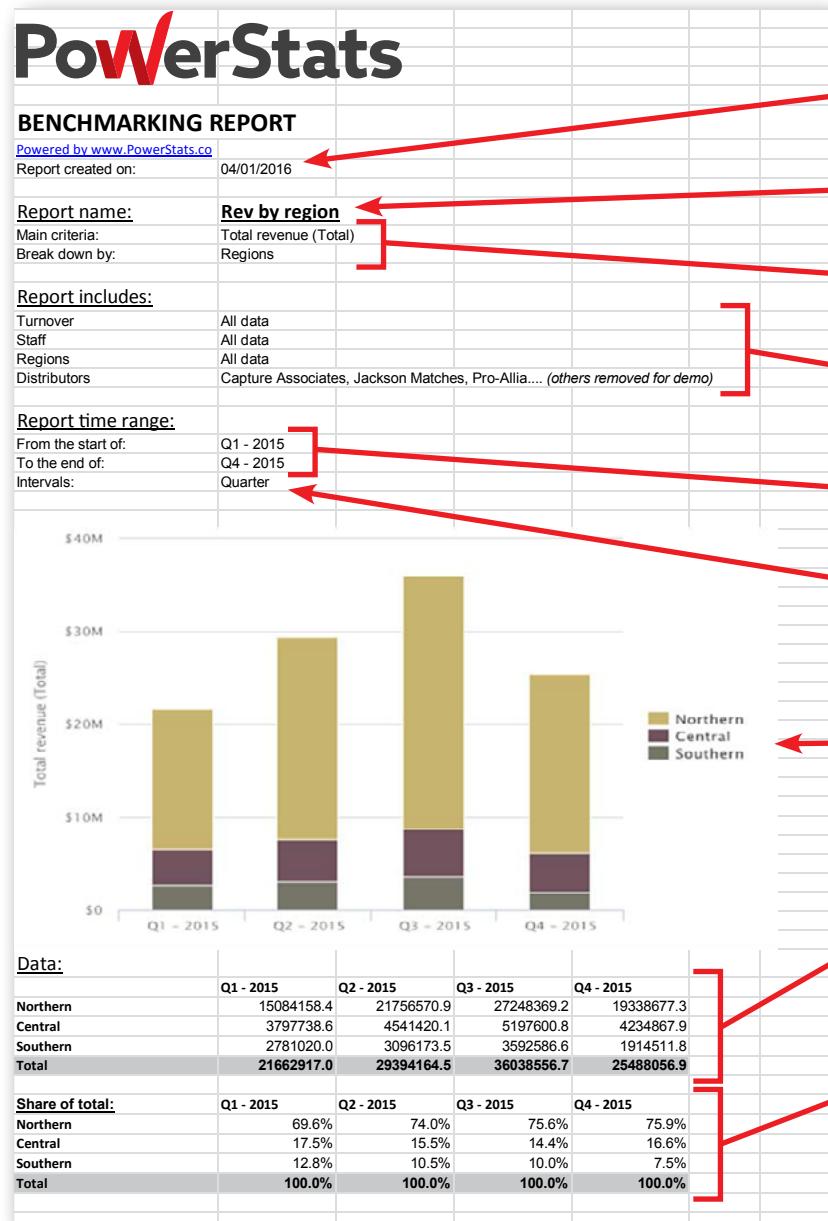
All standard reports within PowerStats can be exported to Excel with just one click of a button!

This could be useful for many reasons:

- Share insight with colleagues not using PowerStats
- Copy-paste the graph from Excel into other applications like Word or PowerPoint
- See the data in a table format
- Easily see the “share of total” percentages
- Manipulate the data further with more complex graphs and/or pivot tables
- Copy-paste the data into other applications
- For comparison reports, easily see the quantity and percentage growth/decline between the two time ranges

This section explains the parts of the Excel export file.

## Standard report export (no comparison)



Date (when you exported the report from PowerStats)

Name that you gave to the report

What the report is all about - criteria and any break-downs

Information on any active filters

Date range of the report

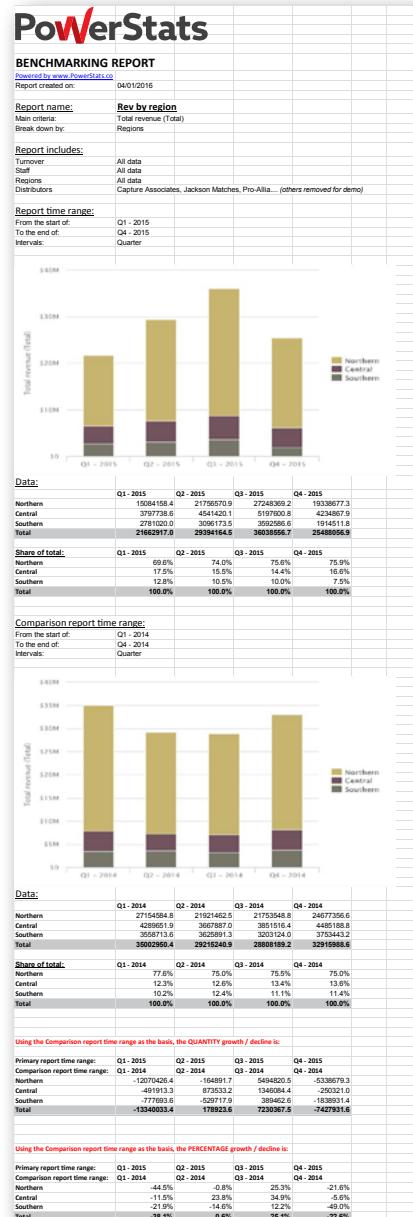
Interval setting of the report

Copy of the graph as a PNG file (Note: this doesn't always look the same as it did on your screen inside PowerStats)

The actual raw data that makes up the report

“Share of total” table: this automatically calculates the significance of each data point as a percentage of the total - useful for quickly comparing market share, significant market opportunities, growth areas etc.

## “Comparison” export



Same content as a non-comparison export (already covered on the previous page)

Comparison time-range data (same as the primary data)

Using the Comparison report time range as the basis, the QUANTITY growth / decline is:

Primary report time range:	Q1 - 2015	Q2 - 2015	Q3 - 2015	Q4 - 2015
Comparison report time range:	Q1 - 2014	Q2 - 2014	Q3 - 2014	Q4 - 2014
Northern	-12070426.4	-164891.7	5494820.5	-5338679.3
Central	-491913.3	873533.2	1346084.4	-250321.0
Southern	-777693.6	-529717.9	389462.6	-1838931.4
Total	-13340033.4	178923.6	7230367.5	-7427931.6

Using the Comparison report time range as the basis, the PERCENTAGE growth / decline is:

Primary report time range:	Q1 - 2015	Q2 - 2015	Q3 - 2015	Q4 - 2015
Comparison report time range:	Q1 - 2014	Q2 - 2014	Q3 - 2014	Q4 - 2014
Northern	-44.5%	-0.8%	25.3%	-21.6%
Central	-11.5%	23.8%	34.9%	-5.6%
Southern	-21.9%	-14.6%	12.2%	-49.0%
Total	-38.1%	0.6%	25.1%	-22.6%

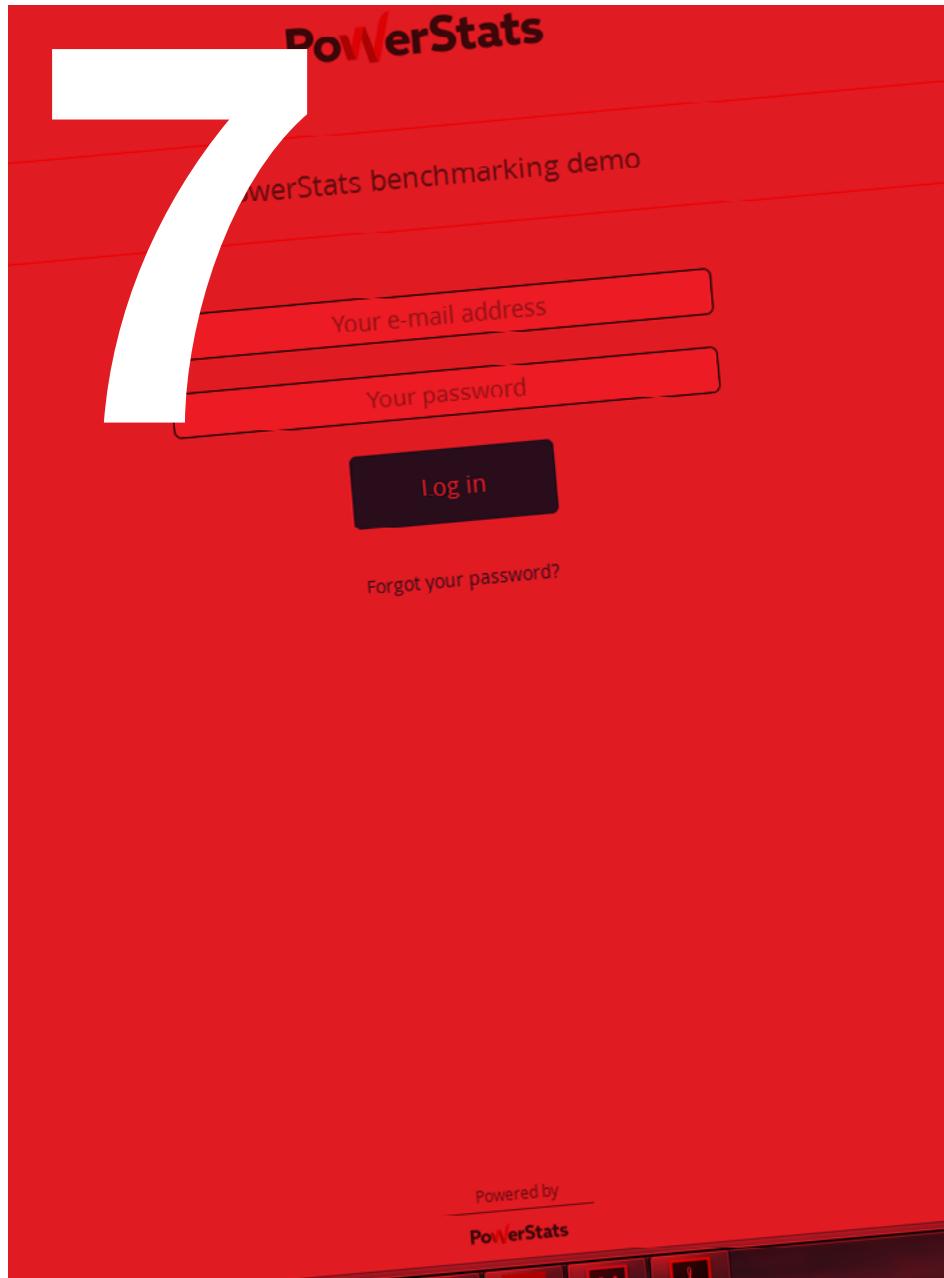
When you export a standard report that has a comparison graph, you will see two additional tables at the very bottom of the Excel file:

### Top table: Quantity growth / decline

This table subtracts the COMPARISON value from the PRIMARY value, thus quickly showing you the growth or decline for this particular data point.

### Bottom table: Percentage growth / decline

This table shows the growth or decline as a percentage value (using the COMPARISON value as the basis for the growth / decline percentage value shown).



# LOGGING IN AND CHANGING PASSWORDS

Before you can log into your PowerStats service, someone must firstly create a License Key for you - which will be sent to you automatically by PowerStats.

As you follow the process outlined in the e-mail invitation, you will need to set up your password for the first time and accept the Terms of Use, as applicable to your project.

After this, you'll be able to log in and use PowerStats!

If you forget your password, or decide that you should change it for security reasons, there are two ways that you can re-set your password:

1. Using the "**Forgot your password?**" link on the home page, or:
2. Editing your password via the "**Personal settings**" page inside the SETTINGS tab of PowerStats (assuming you are logged in, of-course).

# That's all folks! Thank you.

Please feel free to get in touch on the details below if we can be of help.

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