# wBenchmark User Guide

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# wBenchmark User Guide

## Overview

wBenchmark for Sugar is a paid add-on that can capture and store KPIs from any Sugar standard or user-defined module at specific points in time such as daily, weekly, monthly, quarterly, and yearly periods. Create custom goals, metrics, and visualizations for your organization's unique needs. This guide covers how administrators and users can engage with the wBenchmark plug-in after it has been installed to your Sugar instance. For more information on installing wBenchmark, please refer to the W-Systems Product Installation Guide.

**Note**: This guide pertains to the latest release of wBenchmark. If you are not using the latest version, then you may not have access to some of the features listed on this page. Please refer to the W-Systems Supported Platforms page for more information on the latest package versions.

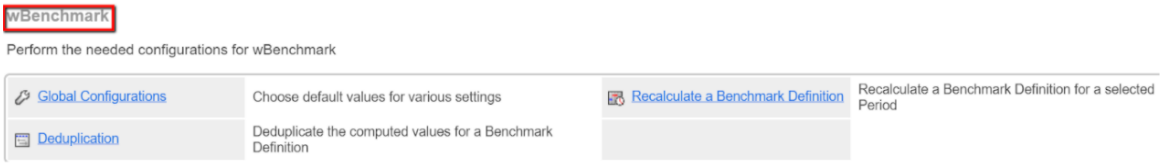
## Features

- **Build Beautiful Charts**: wBenchmark enables you to create chart dashlets containing easy to follow data on your KPIs, and add them to your Sugar dashboard.
- **Metrics Definitions**: wBenchmark automatically adds a new **Metrics Definition** module, where users can add new metric definition sets and detailed metric definitions.
- **User and Team Goals**: wBenchmark adds a **Goals module** where Goal sets can be added for users, teams or users in teams. Goals can be defined for any recurring time period and may be different at different points in the year. wBenchmark also adds a **Default Goal Value** tab.
- Goal Import Tool: If you need to create several goals for your metric definitions, wBenchmark enables you to import goals and skip the record creation process.
- **Leaderboard Visualization**: wBenchmark adds a new leaderboard chart type to visualize a team's relative performance on a specific KPI. The leaderboard chart can track progress to goals or compare against an average.
- **Time Series Visualization**: wBenchmark adds a new Time Series chart dashlet that displays metrics over time as either an **Area Chart,** a **Line Chart**, or **Stacked Bar Chart** .
- **Track KPIs From Any Time Period**: wBenchmark allows you to measure and compare performance from any time period and can be customized to your specific targets, fiscal years, and company policies.

# wBenchmark Administration

Before using the wBenchmark package, an administrator must configure the necessary settings from the **wBenchmark** section on the **Administration** page. There are available three configuration options, and an administrator must also Create Destination Module of wBenchmarkTarget type.

- Global Configurations
- Deduplication
- Recalculate a Benchmark Definition

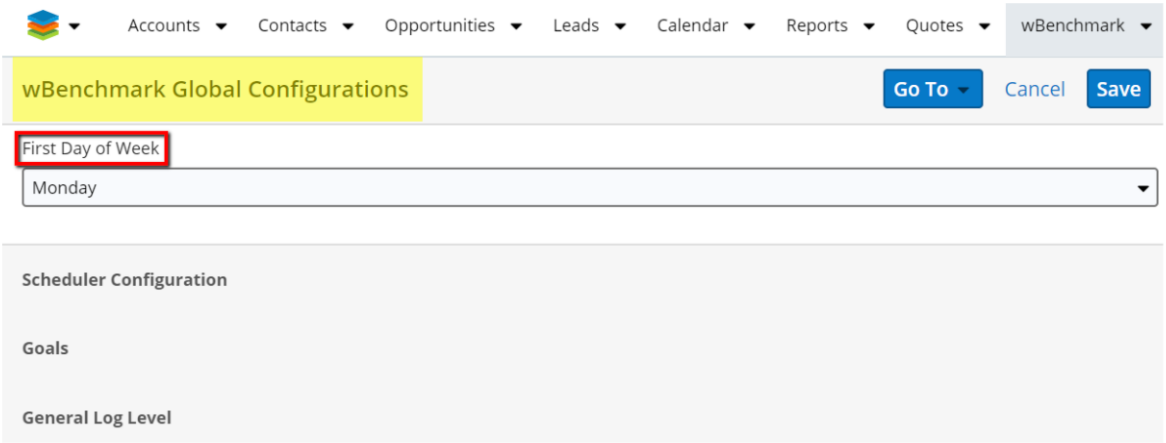



## Global Configurations

On the Administration page go to the wBenchmark section and click on the Global Configurations link. Users can configure more setup options in this section.

**First Day of the Week**.

This dropdown menu allows users to select which weekday represents the first day of the week. Weekly, on the selected day, Benchmarks will be generated.

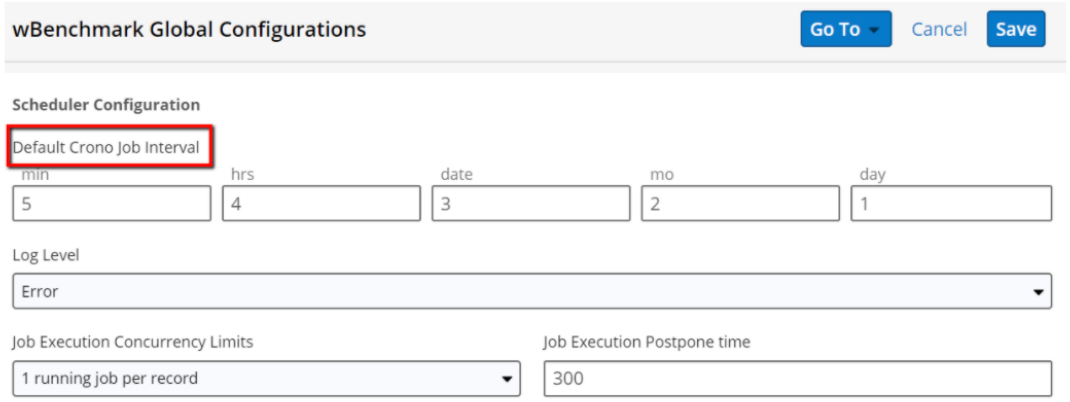



**Scheduler Configurations.**

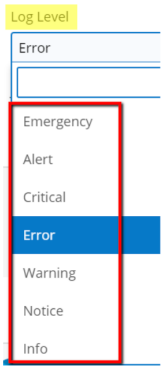
In the Scheduler Configurations section of the **wBenchmark Global Configurations** panel are available 4 configuration options: Default Chrono Job Interval, Log Level, Job Execution Concurrency Limits, and Job Execution Postone

Time.

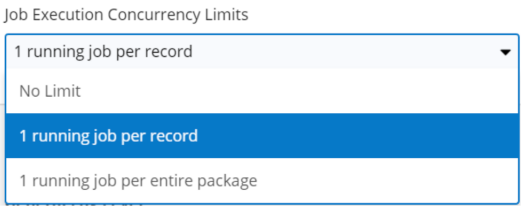
**Default Chrono Job Interval section.** Here are configured the default settings for the generated wBenchmark scheduled jobs.




**Log Level**. This dropdown field allows users to set the message that will be displayed when errors occur.




**Job Execution Concurrency Limits**. This dropdown field allows users to set the limit of running jobs per record.

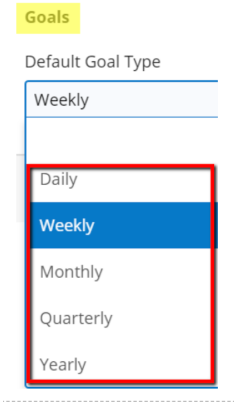



**Job Execution Postpone Time**. This field allows users to set the number of seconds the Job Execution will be delayed by if the record is not available for the Job at the scheduled time.

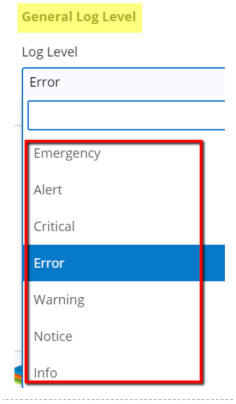
**Note**: Please note that wBenchmark jobs should run daily for the Benchmarks to be created and the calculated values to be updated accordingly.

**Goals.**

The **Goals** section lets users set **Daily, Weekly, Monthly, Quarterly, Yearly** goal definitions for the Benchmarks. The default value of this field is Weekly.

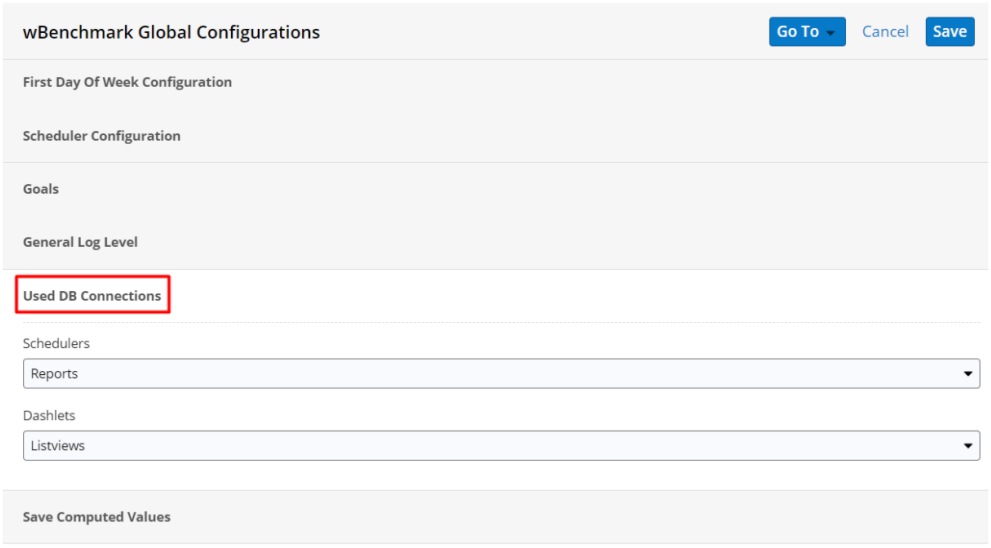



**General Log Level.** This field allows users to set the Log Level to any value they choose from the dropdown.




**Used DB Connections**

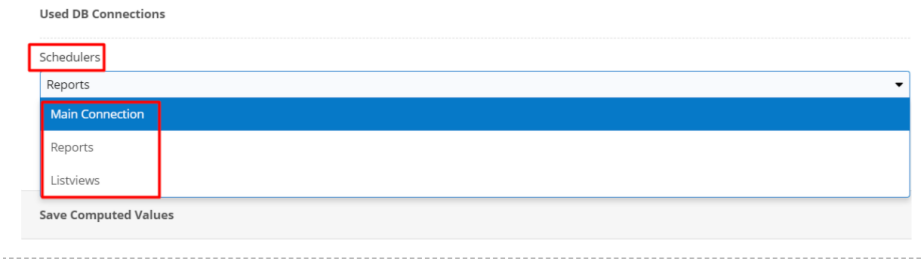
This area lets you to **Configure the Preferred DB Instance for Performing Selects:**




- If you have a DB instance (read replica - for example: reports instance or listview instance ) on which the needed queries can be executed you can select it from here.
- By default the value is set to **Main Connection.** All Updates / Inserts are always executed via Sugar Default Connection.

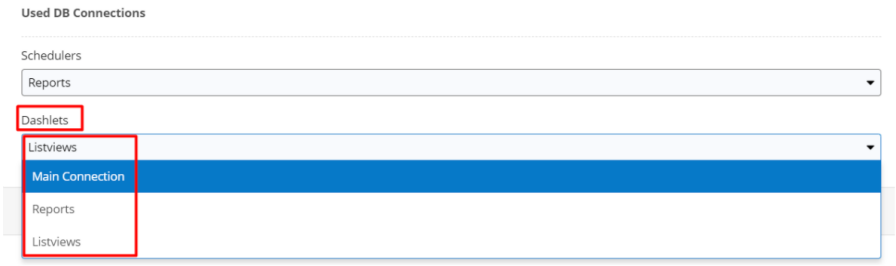
**Schedulers:**

- The Connection used on Computation Logic.
- The complexity of the queries used by the schedulers are directly influenced by the definitions, filters used on definitions and the number of teams/users linked to a wBenchmark record.
- If you have a faster/powerful db instance it is strongly recommended to use it




**Dashlets:**

- The Connection used for retrieve the needed data for display the dashlets
- If you have a faster/powerful db instance it is preferable to use it.



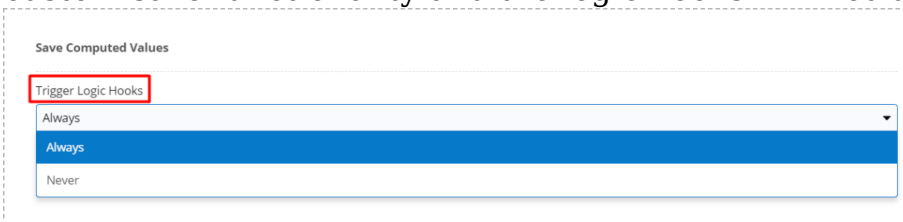

### Save Computed Value

This area let you Configure the How the new Computations are saved.

### Trigger Logic Hooks:

This option is used for config if SugarCRM Logic Hooks will be triggered or not when save the computed values on the destination bean

- Default value is **Always**
- Available Options are:
  - **Always** - The save of the destination bean is performed via default SugarCRM save functionality (the Logic Hooks are triggered)
  - **Never** - The save of the destination bean is performed with a custom save functionality and the logic hooks will not be triggered.

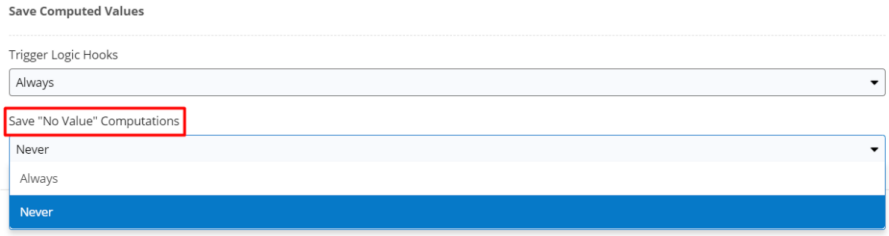



### Save "No Value" Computations:

When a computation is performed it can result in a no value / result for a given user / team + group by field + period + filter applied to definition + definition. It is possible that a wBenchmark record to have no value / result for all of its definitions for a given user / team + group by field + period and in this case, the resulted record is named "No Value"

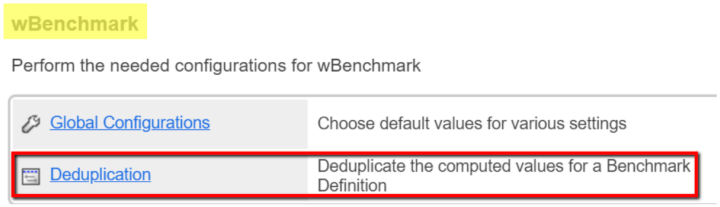
- Default value is **Never**

- Available Options are:
    - **Always** - All the generated records will be saved.
    - **Never** - Will be saved on the resulted record which has at least one definition with result.



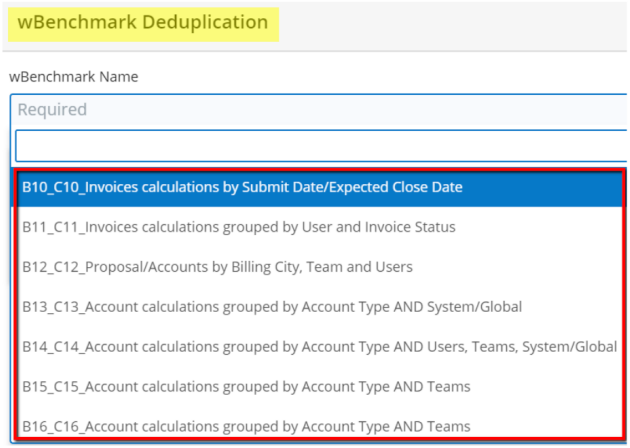

## Deduplicate Calculated Benchmarks

The wBenchmark package allows users to remove the computed values for a Benchmark Definition that are duplicated. On the **Administration** page, go to the wBenchmark section and click on the **Deduplication** link.




The **Deduplication** action will not recalculate any values. It will only delete them.

Clicking on the Deduplication link will take the user to a w **Benchmark Deduplication** page where they can configure the Deduplication settings. **wBenchmark Name** is a dropdown field that displays all existing benchmarks.



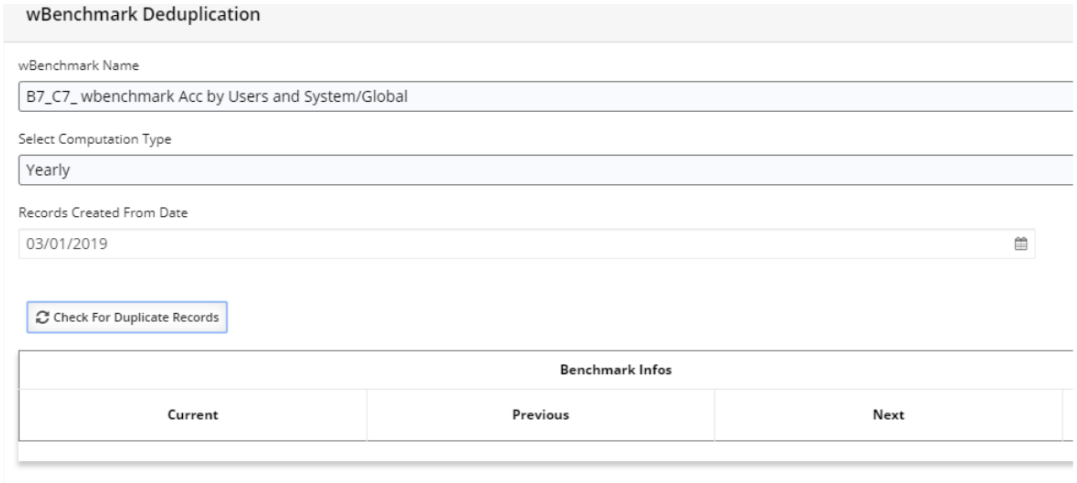
Once a benchmark record is selected, three other fields become editable.

**Select Computation Type**. This is a dropdown field with the following values: Daily/Weekly/Monthly/Quarterly/Yearly. These values allow the user to set how frequently the benchmarks are generated.

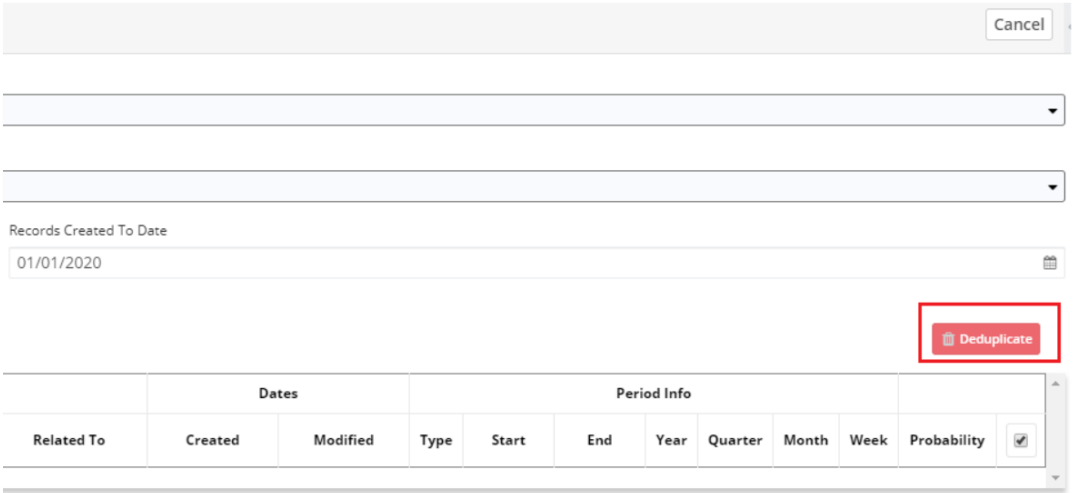
**Records Created From Date**. This is a date-type field.

**Records Created to Date**. This is a date-type field.

Pressing on the "**Check for Duplicate Records**" button to see if there are any duplicated records. If there are, they will be displayed in a table like in the image below:

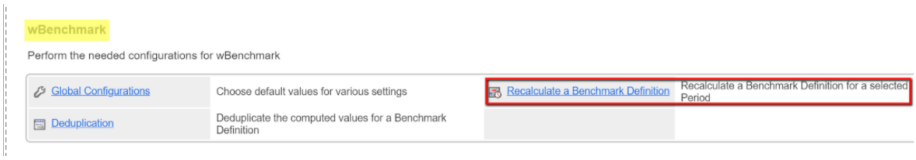



To delete duplicate records, select and delete those by using the "**Deduplicate**" button on the right side of the panel.

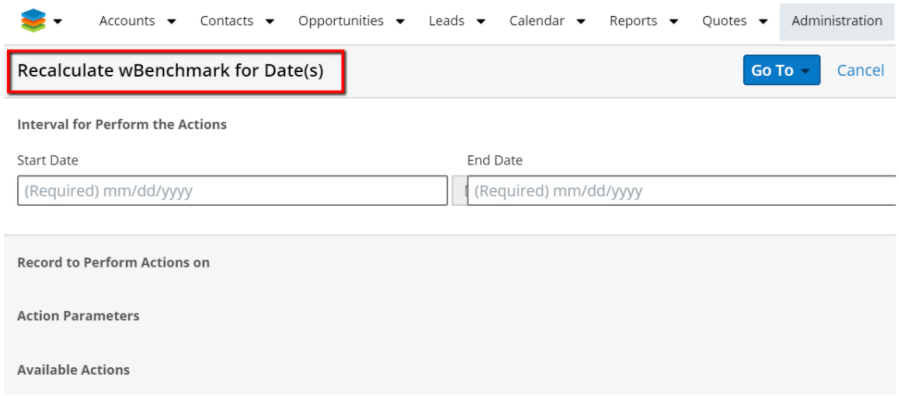


## Recalculate a Benchmark Definition

Admin users can run the scheduled job of a wBenchmark record for a selected period. To do so, go on the **Administration** page on the **wBenchmark** section. Click the "**Recalculate a Benchmark Definition**" link.

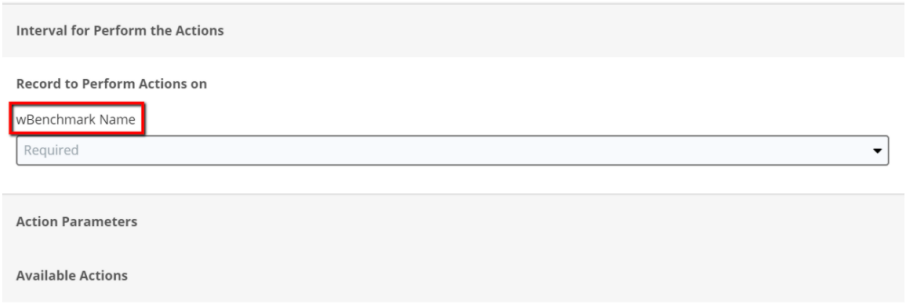



This will take you to the **Recalculate a Benchmark Definition** page.

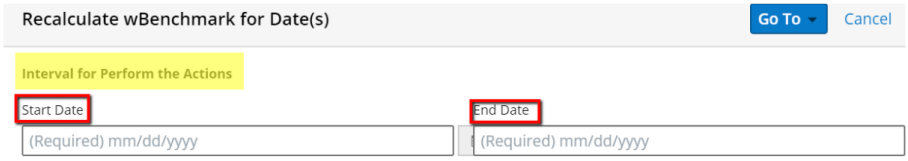



Here, users can set up the following:

**wBenchmark Name**. This is a dropdown field with all wBenchmark records from Sugar.

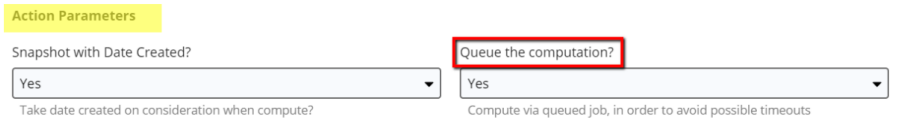



**Start Date** and **End Date** are date picker fields. Users can set up the period in which the wBenchmark scheduled job will run.

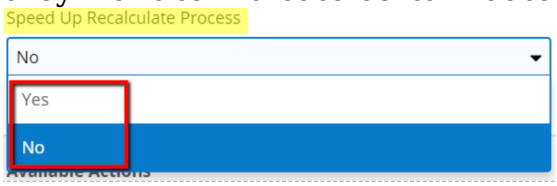


**Snapshot with Date Created?** This setting lets users decide if they want to take or not into account the **Date Created** of the records when calculating the benchmarks.

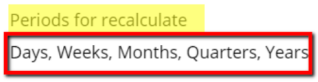
**Queue the Computation?** This is a setting that allows users to Compute via Queued Jobs, to avoid possible timeouts.



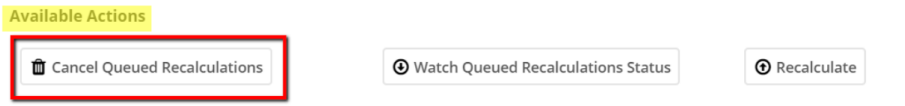

**Speed Up Recalculate Process**. This **Yes/No** field type allows users to decide if they want to indicate certain dates to perform computations.



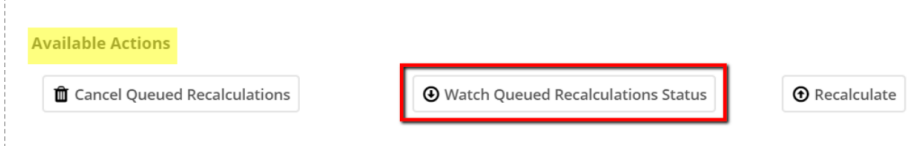

**Periods for Recalculate**. This is a read-only field type that is available only if the **Speed Up Recalculate Process** option is set to **Yes**. It indicates the dates for which the computations will be performed.



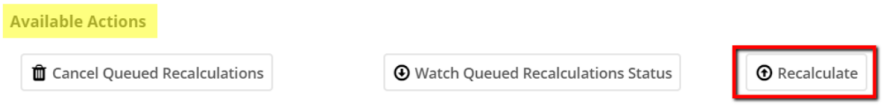

**Cancel Queued Recalculations**. This button lets admin users cancel the scheduled recalculations.




**Watch Queued Recalculations Status**. This button lets users see the status of all Queued Recalculations.

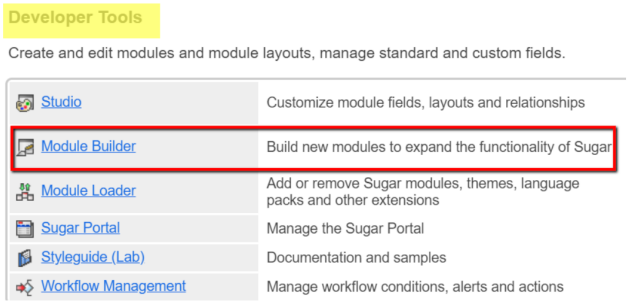



**Recalculate**. Pressing this button will recalculate the Queued Recalculations.

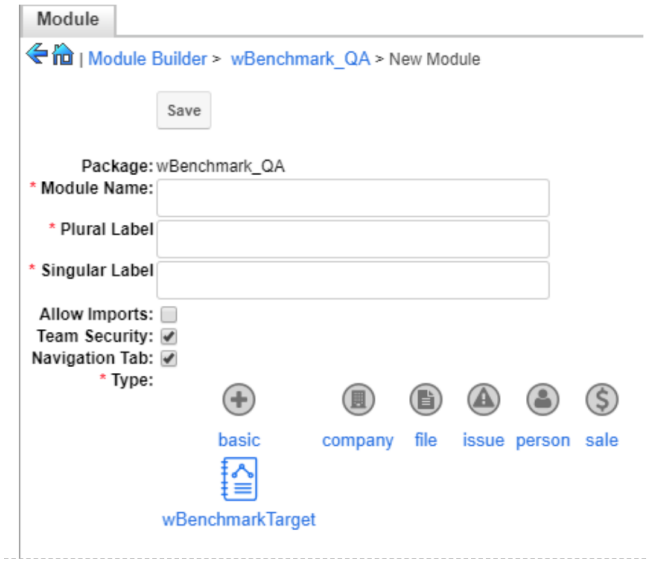



## Create Destination Module of wBenchmarkTarget Type

To create a **wBenchmarkTarget** type module, go to the **Developer Tools** section on the Administration page. Click the **Module Builder** link in the section.



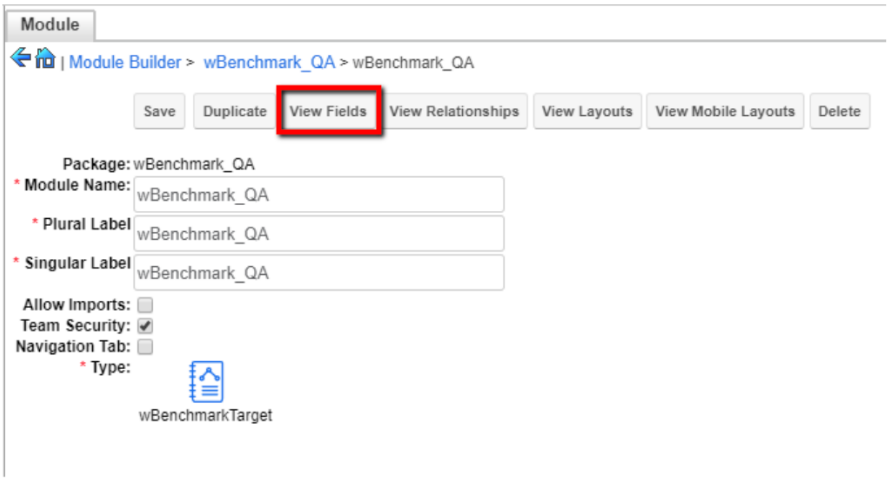

Add "**wBenchmarkTarget**" module types. These will be used as a destination module for the compound values.



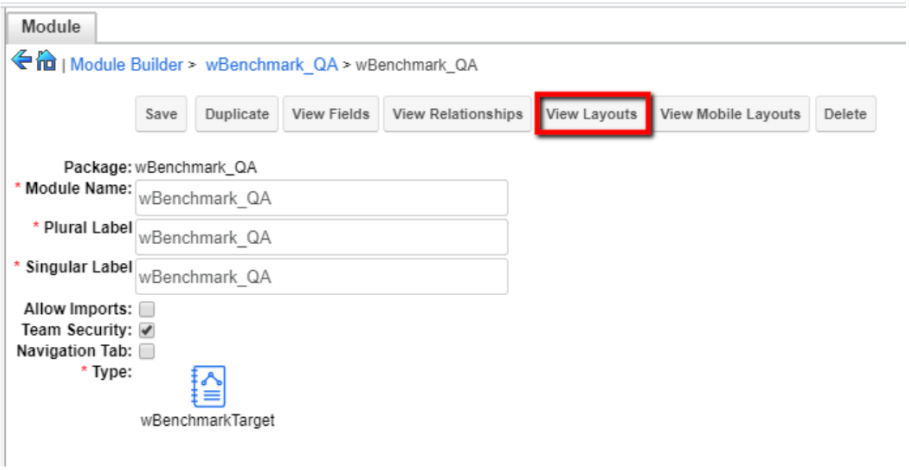

The **wBenchmarkTarget** module type is available only after the

**BenchmarkTargetTemplate** package is installed on your Sugar instance. **wBenchmarkTarget** modules are not displayed in the Navigation Bar. To access this module types, click on the **Target Module** hyperlink.

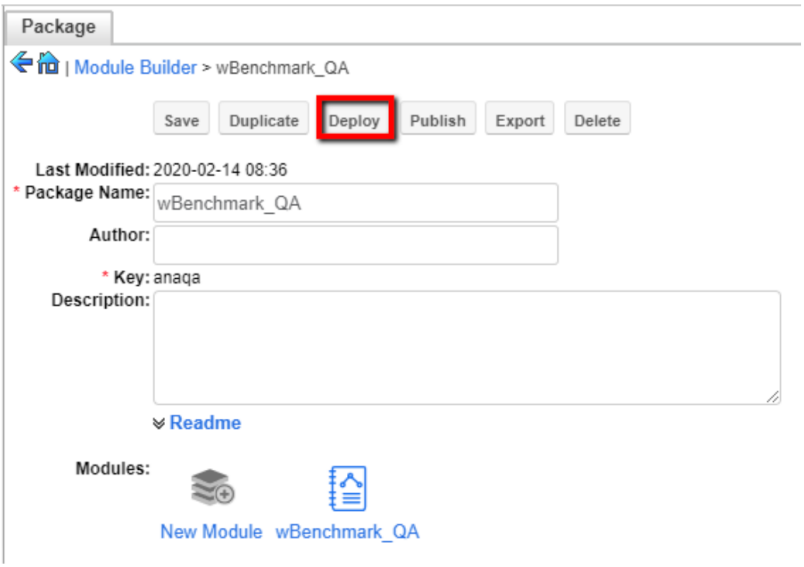
After creating the desired modules, users need to navigate to **View Fields** and create destination fields for the calculated Benchmarks.




Users must configure the fields they create for both **List View** and **Record View**. To manage this, navigate to **View Layouts**.

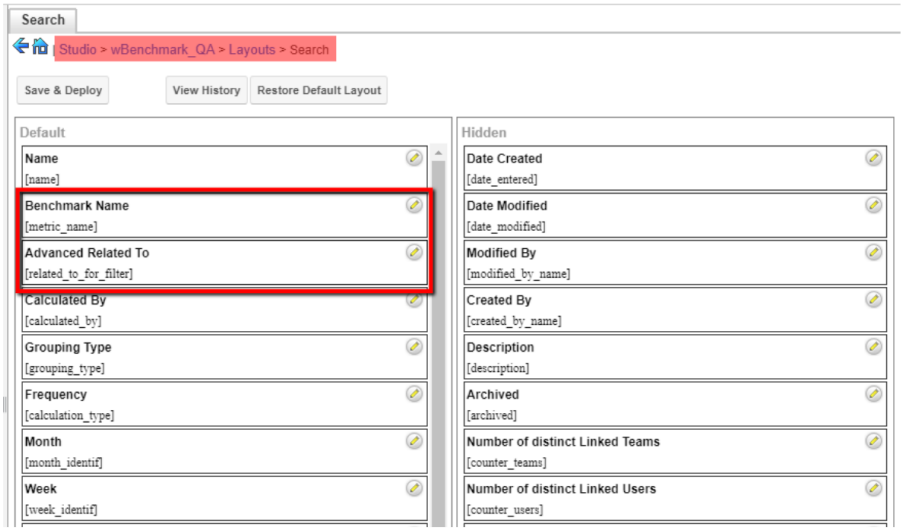



To save your configurations, **Deploy** the package.




**Important Note**: Please ensure that the Package Name is not equal to "wBenchmark", since this module already exists on your Sugar instance.

Navigate to **Studio > Target Module > Layouts > Search** to add the "**Benchmark Name**" and "**Advanced Related To**" fields to the column.




**Save and Deploy** your changes.

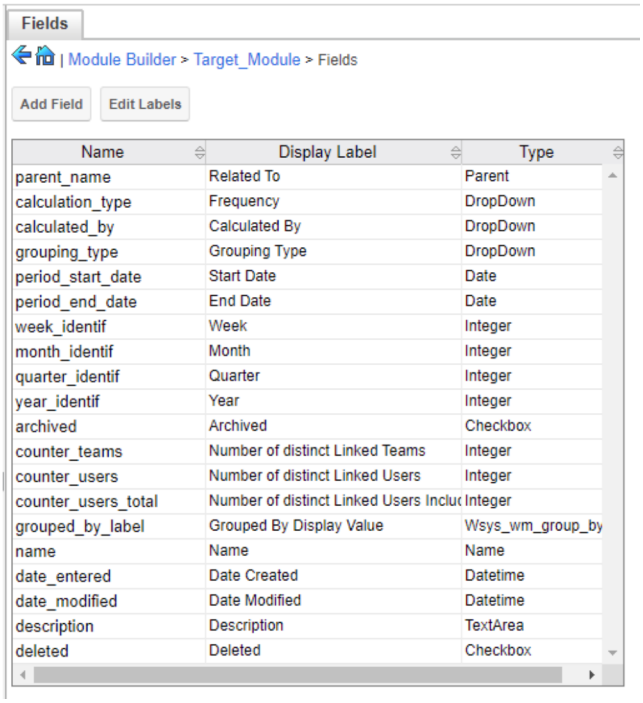
# Using the wBenchmark Module


- Target Module
- wBenchmark Buttons
- Examples of wBenchmark Records

- Goals
- wBenchmark Dashlets

## Target Module

Target Modules have the following default fields:




| Name | Display Label | Type |
|---|---|---|
| parent_name | Related To | Parent |
| calculation_type | Frequency | DropDown |
| calculated_by | Calculated By | DropDown |
| grouping_type | Grouping Type | DropDown |
| period_start_date | Start Date | Date |
| period_end_date | End Date | Date |
| week_identif | Week | Integer |
| month_identif | Month | Integer |
| quarter_identif | Quarter | Integer |
| year_identif | Year | Integer |
| archived | Archived | Checkbox |
| counter_teams | Number of distinct Linked Teams | Integer |
| counter_users | Number of distinct Linked Users | Integer |
| counter_users_total | Number of distinct Linked Users Inclu | Integer |
| grouped_by_label | Grouped By Display Value | Wsys_wm_group_by |
| name | Name | Name |
| date_entered | Date Created | Datetime |
| date_modified | Date Modified | Datetime |
| description | Description | TextArea |
| deleted | Deleted | Checkbox |

**Name**: has the format  "Benchmark Name – Calculated By #Relate To – Frequency – Start Date".

**Calculated by**: depending on the Related to Field, this field can be User or Team

**Grouped by Display Value**: This is a system field that displays the value used when using the Group by Source Field

**Grouping Type**: This is a dropdown field that displays the definition of the Grouping Type (USer / Source Field / User & Source Field)

**Related To**: this is a hyperlink to the user or team where the benchmark is calculated from.

**Frequency**: this field can have the values of Daily, Weekly, Monthly, Quarterly, or Yearly, depending on the period for which the benchmark was generated.

**Start Date**: This field states the start date of the period for which the benchmark is calculated.

**End Date**: the end date field states the end date of the period for which the benchmark is calculated.

**Week**: this is a field that attributes a unique week identifier that states the week for which the benchmark was created. **Example**: If Week equals 201810, this means that the benchmark was generated for the 10th week of 2018.

**Month**: this field's value is a unique month identifier that stands for the month for which the benchmark was calculated. **Example**: if Month equals 201803, the benchmark was generated for the third month (March) of 2018.

**Quarter**: this is a unique quarter identifier that stands for the quarter for which the benchmark was calculated. **Example**: if the quarter field equals the value 201801, then the benchmark was generated for the first (1) quarter of 2018.

**Year**: users can identify here the year for which the benchmark was generated.

**Number of distinct Linked Teams**: this field will display the number of distinct teams linked in the Users subpanel.

**Number of distinct Linked Users**: this field displays the number of distinct users linked in the Users subpanel.

**Number of distinct Linked Users Including from teams**: this field displays the number of distinct users linked in the Users subpanel and the members of teams linked in the Teams subpanel.

Three relationships fields will be automatically created as well:

**Benchmark Name** - this is a hyperlink to the related wBenchmark record.

**Previous Benchmark Name** - This is a hyperlink to a previously generated Benchmark record with the same **Benchmark Name, Related To, Calculated By, Frequency** filters. This field is populated only if the Benchmark for the previous period exists.

**Example**: A generated Benchmark for February will have the **Previous Benchmark Name** the generated Benchmark for January.

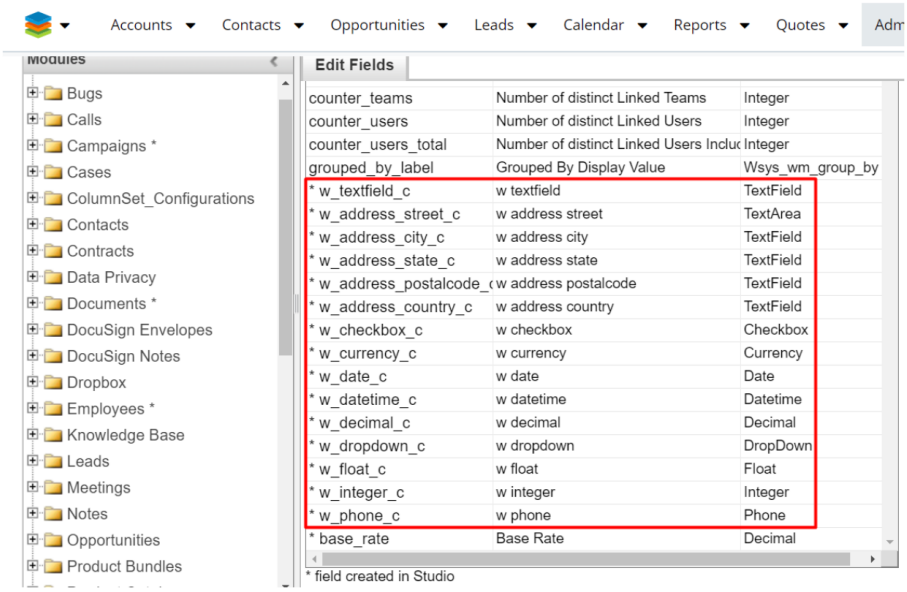
**Next Benchmark Name**: this is a hyperlink to a to-be-generated Benchmark record with the same **Benchmark Name, Related To, Calculated By, Frequency**. This field is populated when the Benchmark for the next period is generated.

**Example**: A Benchmark generated for February will have the **Next Benchmark Name** the generated Benchmark for March.

**Assigned To** - this is the assigned user of the related wBenchmark record.

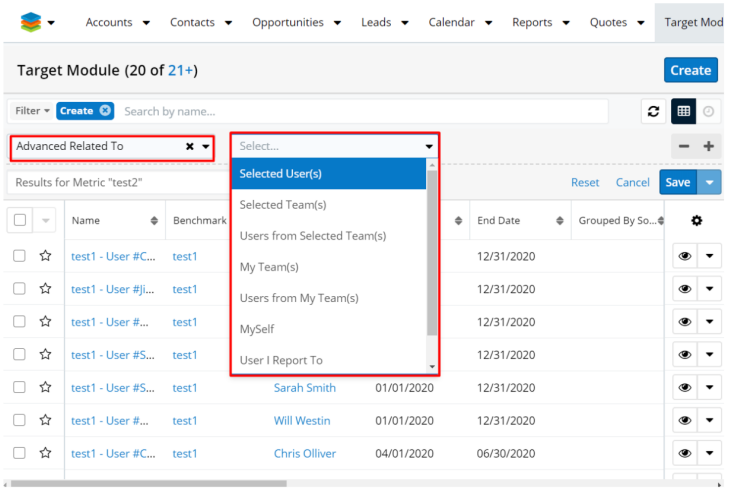
**Teams** - the value of this field is set to Global for all records. This allows all users to see these records.

All the other fields needed for benchmark calculations must be configured from the **Administration** page, **Studio,** the **Target Module** option.




## Custom Target Module Filter

The custom field **'Advanced Related To**' is available for **Targets Modules** in the **Search** dropdown menu.



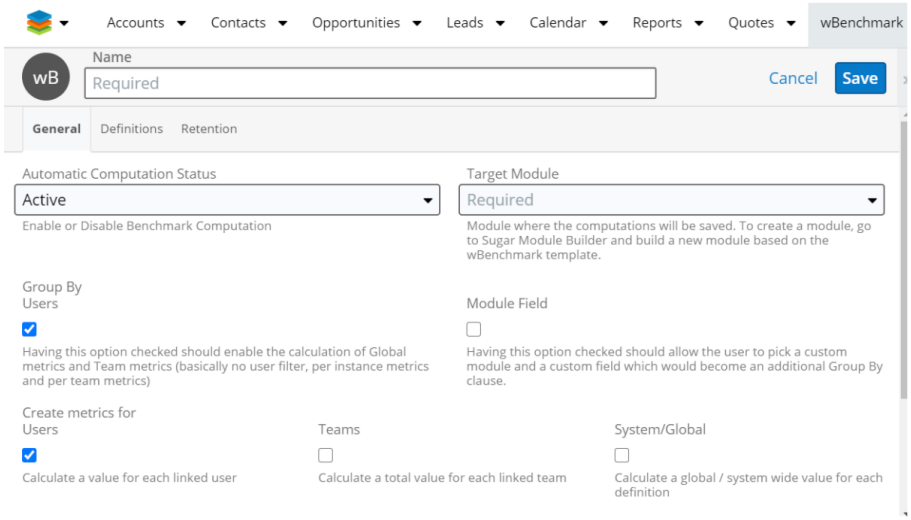

If a filter is created for '**Advanced Related To**' the following operators are available:

- **Selected User(s)** - Displays only the records related to the selected user(s)
- **Selected Team(s)** - Displays only the records related to the selected team(s)
- **Users from Selected Team(s)** - Displays only the records related to the users from the selected team(s)
- **MySelf** - Displays only the records related to the current user
- **My Team(s)** - Displays only the records related to the teams where the current user is a member
- **Users from My Team(s)** - Displays only the records related to users from the teams where the current user is a member
- **User I Report To** - Displays only the records related to the user which current user reports to
- **Users That Report To Me** - Displays only the records related to users that report to current user

**Note**: For existing Target Modules the field must be made visible from Studio > Target Module > Layouts > Search.

## wBenchmark Record

A wBenchmark record contains the following tabs and fields:



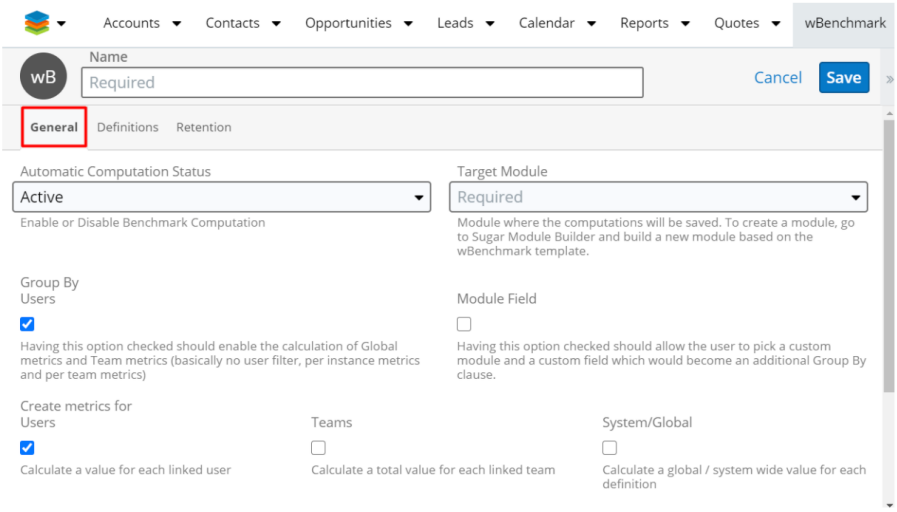

### General Tab

**Benchmark Name** is a required field that displays the name of the benchmark

**Target Module:** Help text: Module where the computations will be saved.

To create a module, go to **Sugar Module Builder** and build a new module based

on the wBenchmark template.



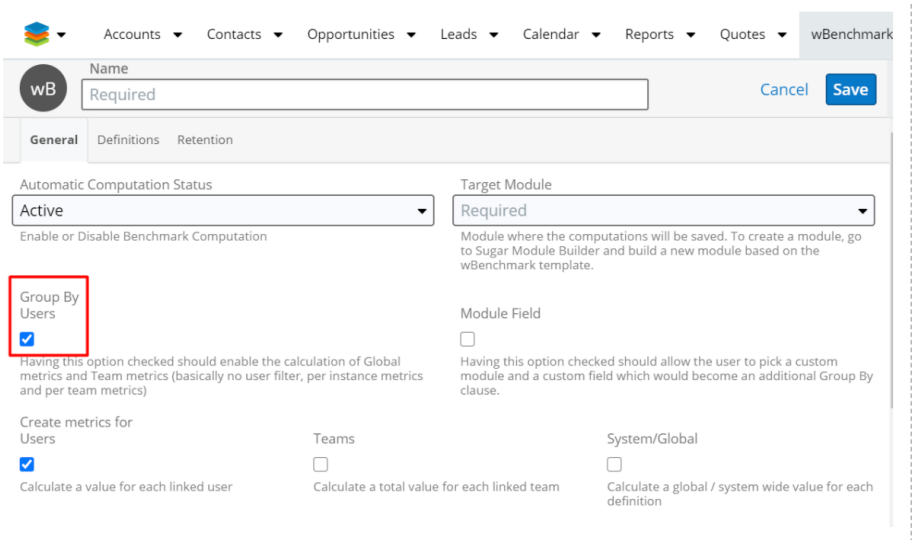

The **Target Module** dropdown field displays the modules of type **wBenchmarkTarget** and cannot be changed if a definition was created for the current wBenchmark record.

On an existing wBenchmark record, the Target Module is a hyperlink that will open in a new tab the **Target Module** List View filtered by the current related wBenchmark record.

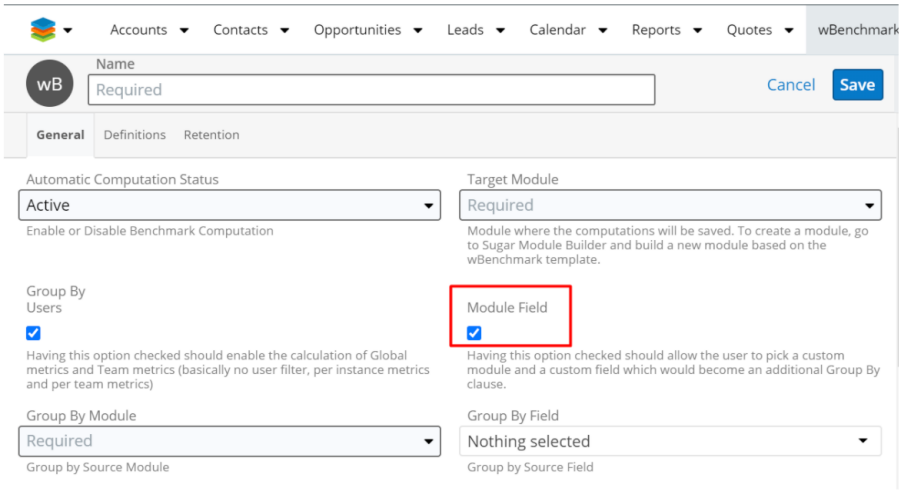
**Note**: For the list view of the target module to be correctly filtered, the Benchmark Name field needs to be available on Search.(Studio -> Target Module -> Layout -> Search - Add wBenchmark Name)

**Group By:**

**Users** - Having this option checked should enable the calculation of Global metrics and Team metrics (basically no user filter, per instance metrics and per team metrics). This field is checked by default.




**Module Field** - Having this option checked should allow the user to pick a custom module and a custom field which would become an additional **Group By** clause.




When this option is selected the two other fields are available:

**Group By Module** - this option requires the creation of a dropdown field that displays all the Modules available.

**Group By Field** - Group by Source Field

**Create Metrics For** - The following options are available only if the **Group By User** option is checked:

**Users** - checked by default, then Benchmarks will be generated for each user from the Users subpanel and for each user from the linked teams in the Teams subpanel

**Teams** - not checked by default, then Benchmarks will be generated for each user from the Users subpanel and for each user from the linked teams in the Teams subpanel. If a user is linked in the Users subpanel but he is also a member of a linked team, only a Benchmark record will be generated for him.

If Checked, then Benchmarks will be generated for each team selected in the Teams subpanel and for each user from the Users subpanel and for each user from the linked teams in the Teams subpanel.

**System/Global** - The calculations are global and are ignoring the users and teams assigned to the Source module records.

**Calculate For**

**Day** - checked by default; a record will be created per day with the values computed based on the Benchmark Definitions defined on the wBenchmark record. A daily record will not be created and the "**Delete daily Benchmarks older than X days**" option is not available.

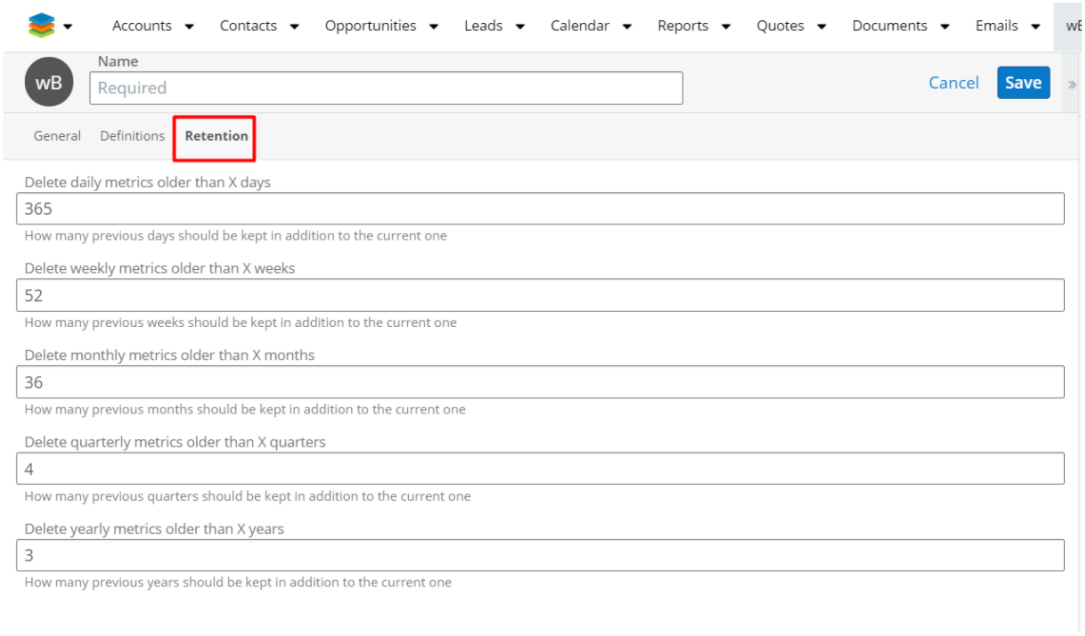
**Week** - checked by default; a record will be created at the beginning of the week with the values computed based on the Benchmark Definitions defined on the wBenchmark record. The calculated values will be updated each time the job will run on that week and only a weekly record will be created for a week.

**Month** - checked by default; a record will be created at the beginning of the month with the values computed based on the **Benchmark Definitions** defined on the **wBenchmark record** . The calculated values will be updated each time the job will run on that month and only a monthly record will be created for a month.

**Quarter** - checked by default; a record will be created at the beginning of each quarter based on each **Benchmark Definition** defined on the **wBenchmark record** . The calculated values will be updated each time the job will run on that quarter and only a quarterly record will be created for a quarter.**Year** - checked by default; a record will be created at the beginning of the year with the values computed based on the **Benchmark Definitions** defined on the **wBenchmark** record. The calculated values will be updated each time the job will run on that year and only a yearly record will be created for a year.

**Retention Tab:**

Old records can be deleted by the benchmark job using the configurations defined in the Retention tab:




### Delete daily metrics older than X days

The user can decide how many previous computed days should be kept in addition to the current one by adding a numeric value to the field "Delete daily Benchmarks older than X days" .

This field is not available if Calculate by Day checkbox is false.

### Delete weekly metrics older than X weeks

By adding a numeric value to the "**Delete weekly Benchmarks older than X weeks** " field, the user can decide how many previous weeks should be kept in addition to the current one. The beginning of the week can be configured by an admin user on **Administration - wBenchmark Global Configurations** page.

**Note**: This field is not available if the Calculate by Week checkbox is unticked.

### Delete monthly metrics older than X months

The user can decide how many previous computed months should be kept in addition to the current one by adding a numeric value to the field "**Delete monthly Benchmarks older than X months**". This field is not available if the **Calculate by Month** checkbox is unticked.

### Delete quarterly metrics older than X quarters

The user can decide how many previous computed quarters should be kept in

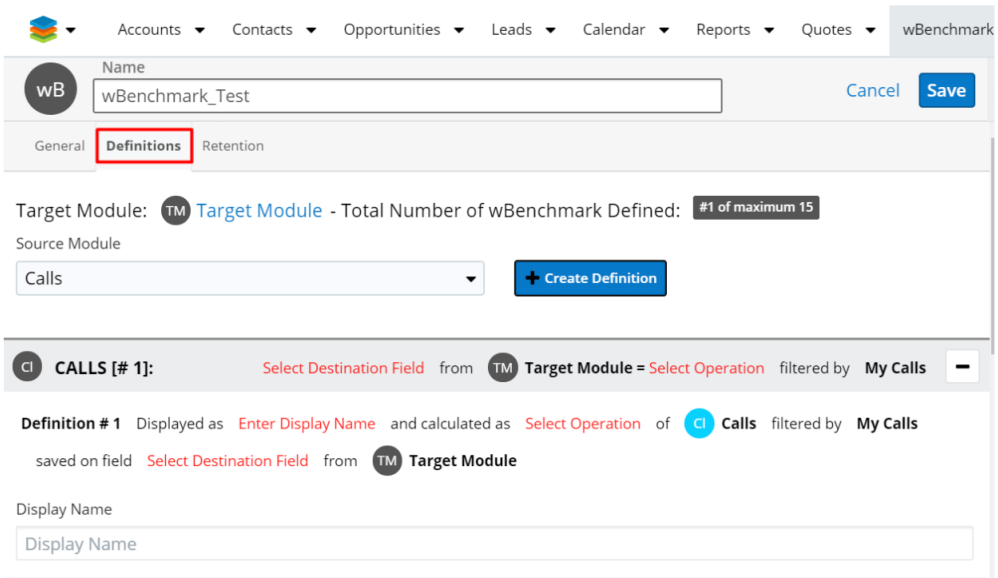
addition to the current one by adding a numeric value to the "**Delete quarterly Benchmarks older than X quarters**" field. This field is not available if the **Calculate by Quarter** checkbox is unticked.

**Delete yearly metrics older than X years**

The user can decide how many previous computed years should be kept in addition to the current one by adding a numeric value to the field "**Delete yearly Benchmarks older than X years**". This field is not available if the **Calculate by Year** checkbox is unticked.

## Benchmark Definition Tab:

The user can create definitions for Benchmarks equal to the number of numeric fields added to the **Target Module**.




**Target Module** - The icon and name of the Target Module selected on the General tab will be displayed. On an existing wBenchmark record, the Target Module is a hyperlink that will open in a new tab the Target Module list view filtered by the current related wBenchmark record.

**Note**: For the list view of the target module to be correctly filtered, the Benchmark Name field needs to be available on Search.

**Total Number of Benchmarks Defined** - Displays the total number of Benchmarks defined and the maximum number of Benchmarks that can be defined. The maximum number of Benchmarks that can be defined is given by the number of fields available from the target module. This excludes the numeric fields that are calculated.

If the user tries to add more definitions to a wBenchmark record that the number of available fields defined for the target module, an error message will be displayed.

**Select Source Module** - All modules from the system will be available.

Generate Definition Template For Selected Module: Is a button that start the creation of a new definition. The creation of a new definition is enabled when the record is in edit mode and only if a Target Module was selected.

**Definitions** - A definition has the following sections:

**Definition Header**: Displays a summary of that definition

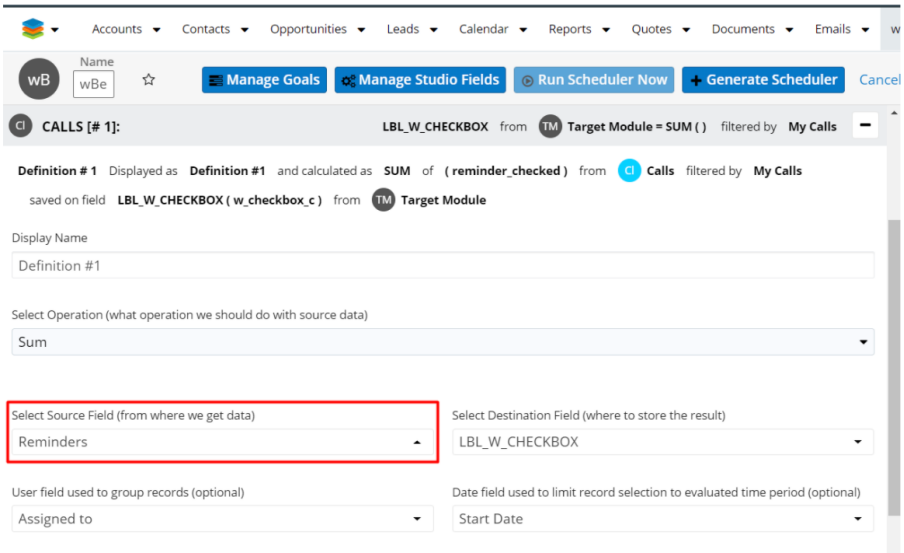
**Definition # <number> Displayed as <Display Name> and calculated as <Select Operation> of <Icon of Source Module> <Select Source Module> filtered by <Default Data Filter> *saved on field* <Select Destination Field> from <Icon of Target Module> <Target Module>Definition**

**Body**:

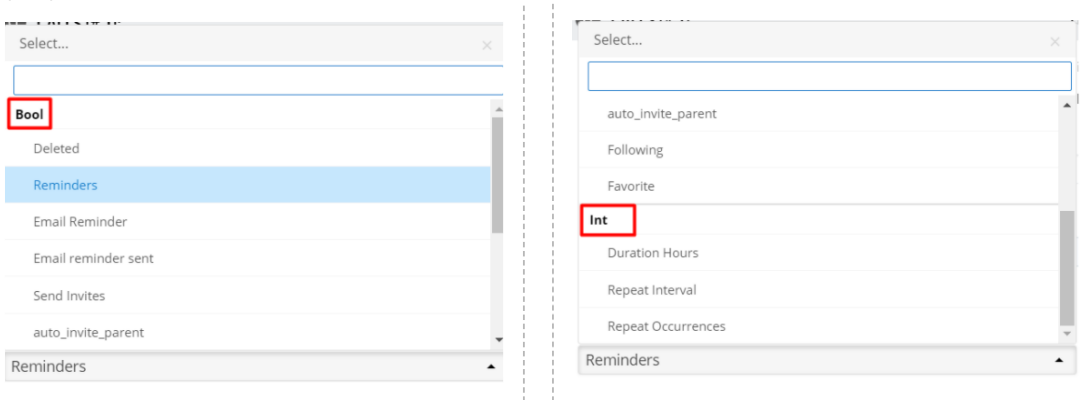
**Display Name**: The user can enter a name for the definition.

**Select Operation** (what operation we should do with source data): A dropdown field that contains the values Sum, Count, Avg, Min, Max, Copy, SQL Calculation representing the operation that will be performed.

**Select Source field:** the field from where wBenchmark will pull data for benchmark computations.



All fields from the source module, that support the selected operation, are available in this dropdown field. The fields displayed in the dropdown are grouped by type:




The field is visible for **Sum, Avg, Min, Max, Copy, SQL Calculation** operations and is **not visible** for **Count**.

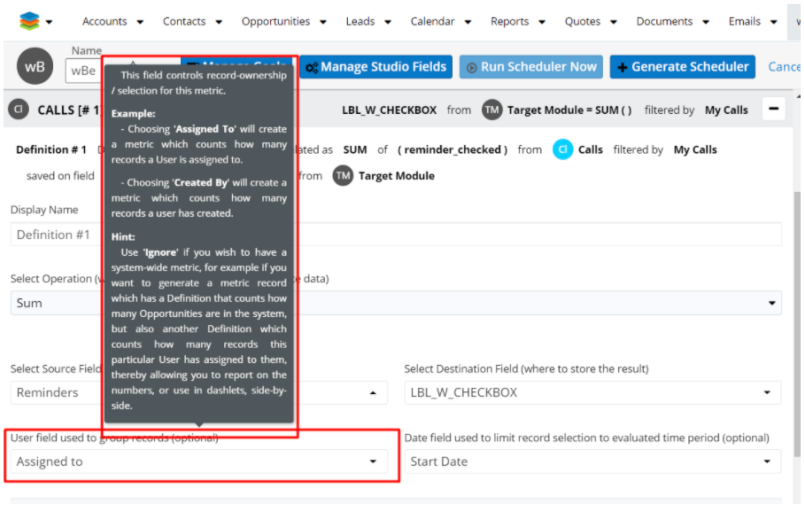
**Select Destination Field** (where to store the result): All fields from the target module are available in this dropdown field, excluding the calculated fields.

All field types from the Target Module are available in dropdown as it follows, and the operations logic is the next one:

- **SUM** - accept as source field all numeric fields (int, float, decimal, currency) and bool, then store them on numeric or bool fields
- **COUNT** - store in any numerical field
- **AVG** - accept as source field numeric, date, time, datetime, datetimecombo, text, bool and enum + multienum and store on numeric, date, time, datetime, datetimecombo, text, bool and enum + multienum
- **MIN / MAX** - any field type ex accept as source numeric, date, time, datetime, datetimecombo, text, bool and enum + multienum and store on numeric, date, time, datetime, datetimecombo, text, bool and enum + multienum
- **COPY** - accept any field type and store on the same field type
- **SQL Operation** - store in any field type

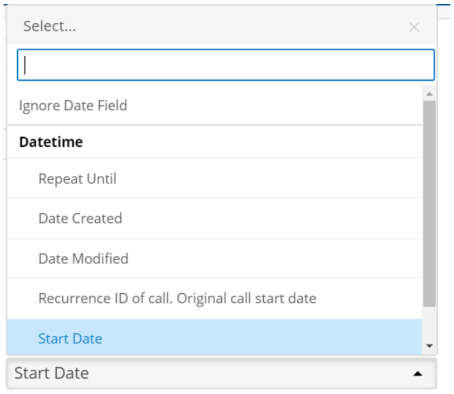
**Important Note**: Except for the **COPY** operation, for the others, the user is responsible for choosing the correct destination field type. The fields displayed in the dropdown are grouped by type.

**Note**: A destination field cannot be used for more than one definition for a wBenchmark record. A tooltip is also available for this field:

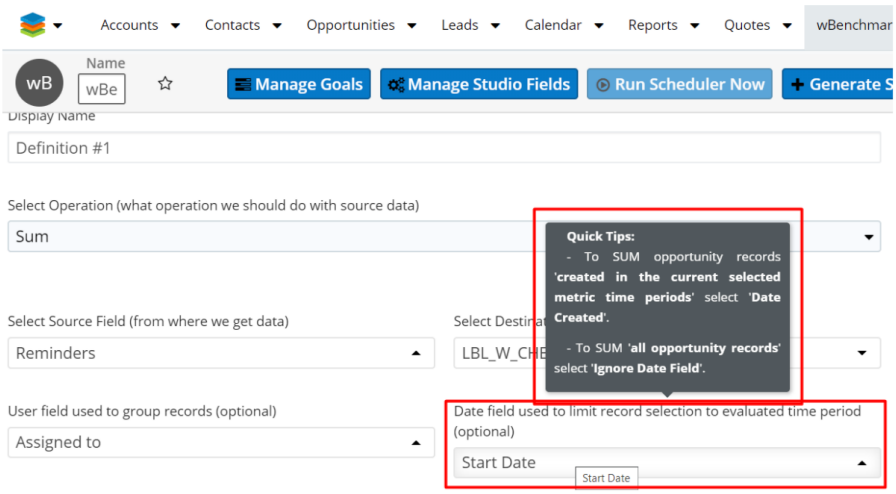



**User field used to group records (optional)**: a dropdown field that contains relationship fields with all users related to the source module records (***Assigned To, Created By, Modified By***). The field has the "**Ignore user field**" option available to calculate global values in a wBenchmark record with when the "**Create metrics for System/Global**" value is false. This field is not available in cases when only "**Create metrics for System/Global**" is true and "**Create metrics for Users and Teams**"  is false.

**Date field used to limit record selection to evaluated time period (optional)** – this is a dropdown field that contains all date fields from the source module. The fields displayed in the dropdown are grouped by type:

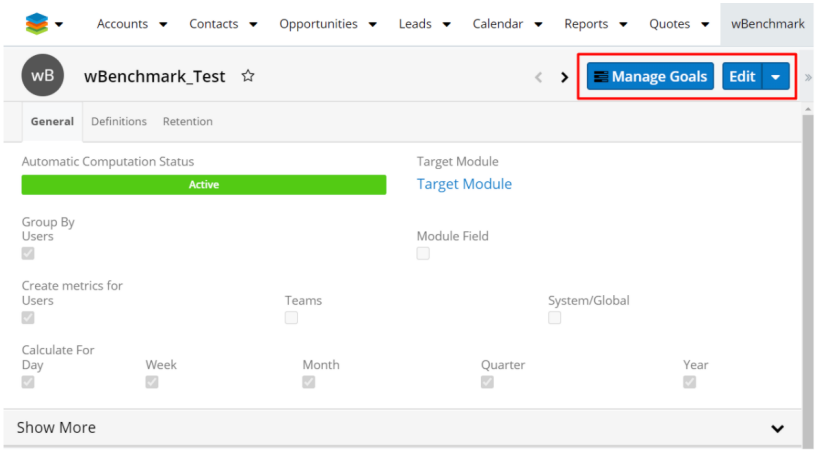



A Tooltip is available for this field:



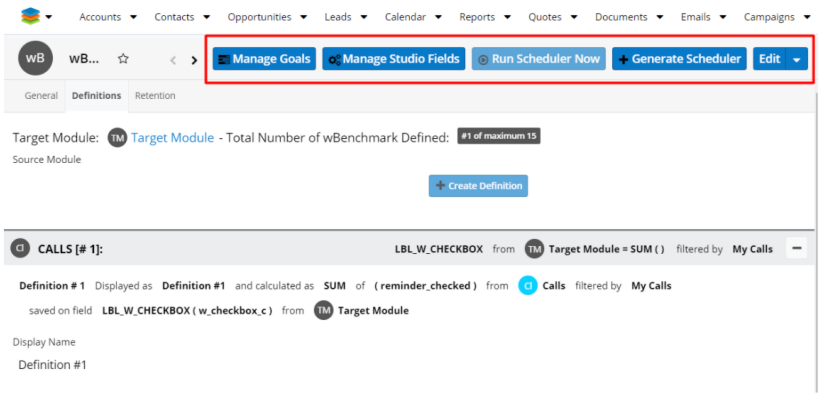

## wBenchmark Buttons

On a wBenchmark record, in Record View, are available two custom buttons **Manage Goals** and **Edit** (from the Actions dropdown menu).




Admin users will have the access to more wBenchmark custom buttons:

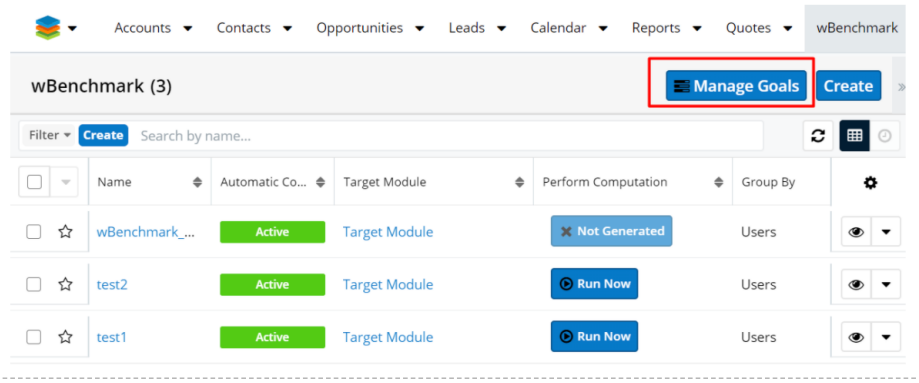
- Manage Goals
- Manage Studio Fields
- Run Scheduler Now
- Generate Scheduler
- Configure Scheduler
- Enable Scheduler
- Edit




## Manage Goals

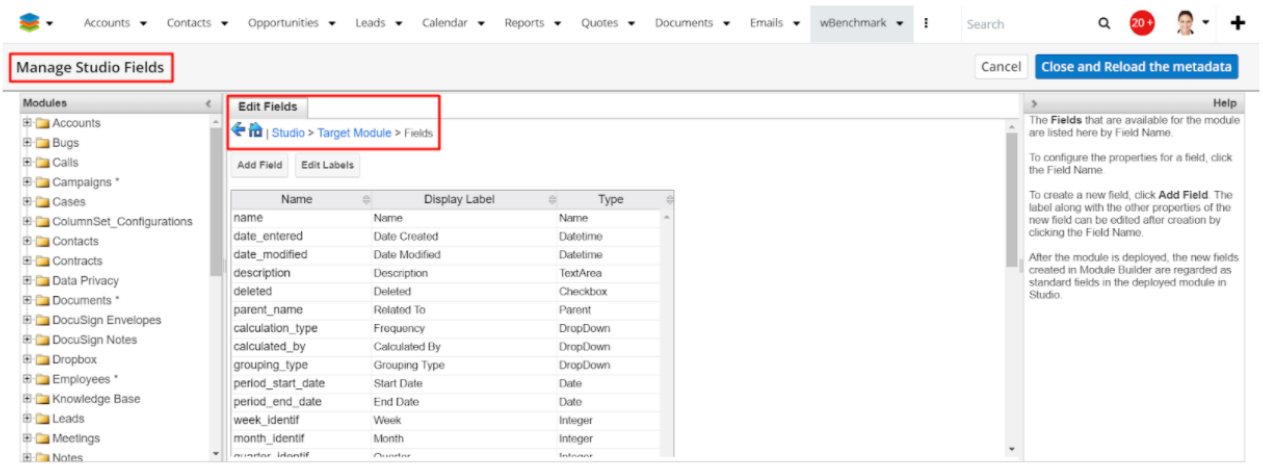
The **Manage Goals** button is available for both admin and regular users. The button redirects users to the **wBenchmark Goal Group** module (#sys_wBenchmarkGoals). (For more details, check the Creating Goals chapter).

This button is also available on wBenchmark list view, next to the **Create** button.




## Manage Studio Fields

This button opens in a drawer the Studio module on the path **Studio -> Target Module -> Fields**.



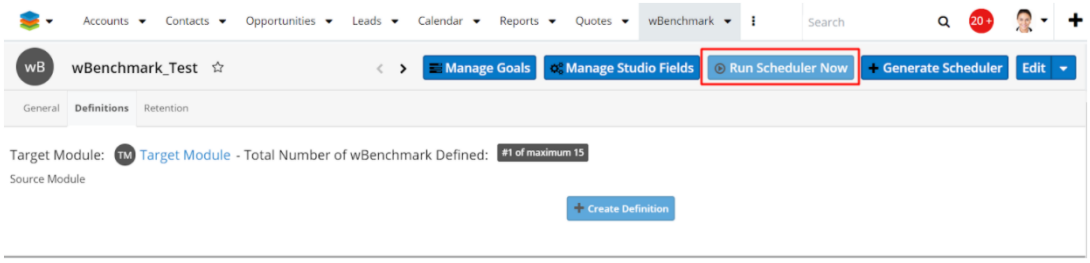

On the opened drawer, the user can add new fields and then press the **Close and Reload the Metadata** button. The wBenchmark record view is reloaded and the Maximum Number of Definitions Available will be increased if any numeric fields were created.

**Note**: The wBenchmark record should be saved before using the "Manage Studio Fields" button to save and not lose any changes that were made to that record. The "Manage Studio Fields" button can be used when the maximum available definitions has been reached and the user needs more numeric fields on the Target Module.

### Run Scheduler Now

The **Run Scheduler Now** button forces the related scheduler job to run for the current date; it is disabled until a scheduled job is generated.

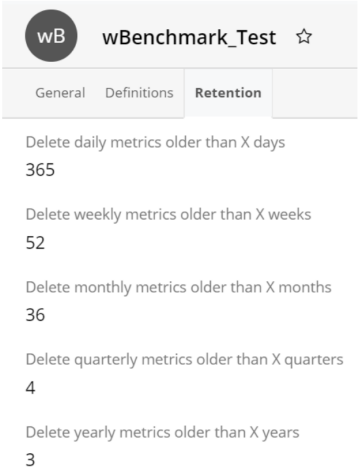
By using this button, the records will be created/updated based on the related wBenchmark, but the old records will not be deleted if the CRON is not set to run automatically.




### Generate Scheduler

After a wBenchmark record is created with at least 1 definition, the **Generate Scheduler** button will be displayed next to the **Edit/Save** button on the wBenchmark **Record View** .

The **Generate Scheduler** button creates a scheduler job that will execute the corresponding wBenchmark. When the scheduled job will run, the Benchmark records will be created in the target module based on the corresponding wBenchmark. The job also deletes the records defined in Retention tab:




**Note**: The wBenchmark record can be updated even if the scheduled job was generated. On the next run the job will take the new configurations.

### Configure Scheduler

On a wBenchmark record that has its scheduler job generated, the **Configure Scheduler button** is displayed instead of the "**Generate Scheduler**" button. The Configure Scheduler opens in a new tab of the related scheduler job in **Edit** mode.

### Enable Scheduler

If the related scheduler job has the status '**Inactive**' this button will be displayed. The **Enable Scheduler** action opens in a new tab the related scheduler job in **Edit** mode.

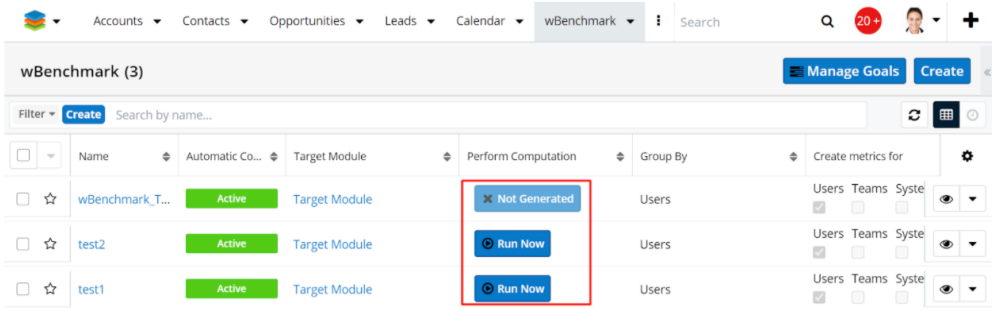
### Copy

Using the Copy button will create a new wBenchmark record with the following details copied from the original record:

- General tab fields
- Definitions
- User and Teams

### Run Scheduler

The scheduler job can also be executed manually from **wBenchmark List View**, by using the **Run Now** button available on the **Perform Computation** column. If the job is not generated yet, then the button is disabled and **Not Generated** is displayed instead.




### Manually run

The generated wBenchmark Scheduled job can be manually run by accessing the following URL:

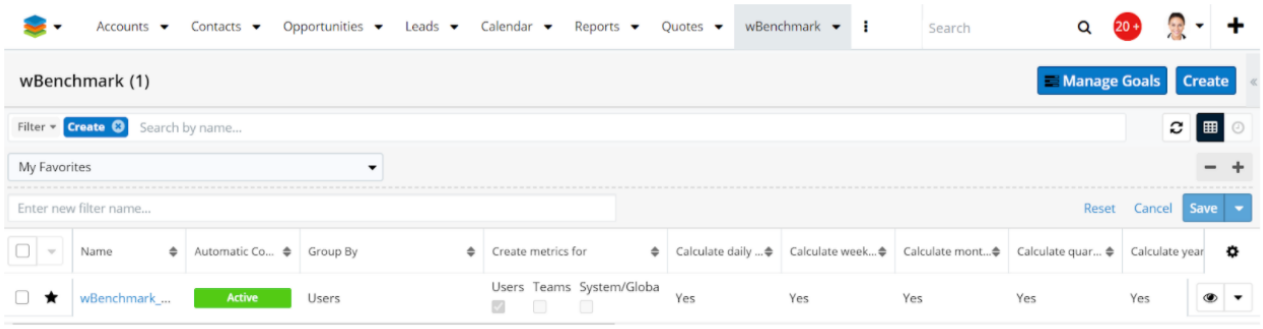
<instance_url>/index.php?entryPoint=wMetricCronoEntryPoint&cronoIDS=<ScheduledJobID>&runNow=true&runForDate=<date: format YY-M-D (2018-03-28)>&debugLog=true

## Examples of Benchmark records

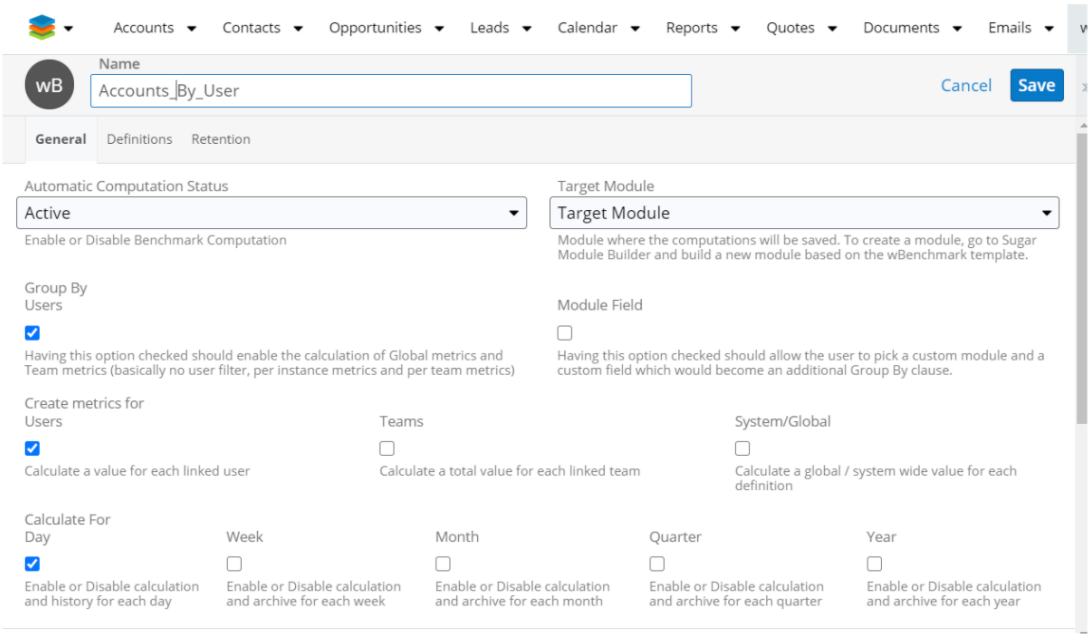
The following benchmarks are created and calculated based on **Grouping Type** (**Users, Module Field**), **Calculate Metrics for** (**Users, Teams, System/Global**) and **Frequency** (**Day, Week, Month, Quarter, Year**).

### Case 1: Group By Users

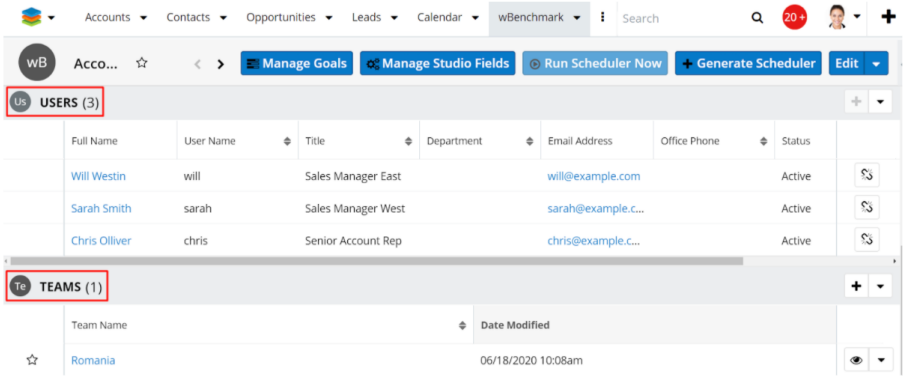
### Calculate Metrics for User; Frequency: Day



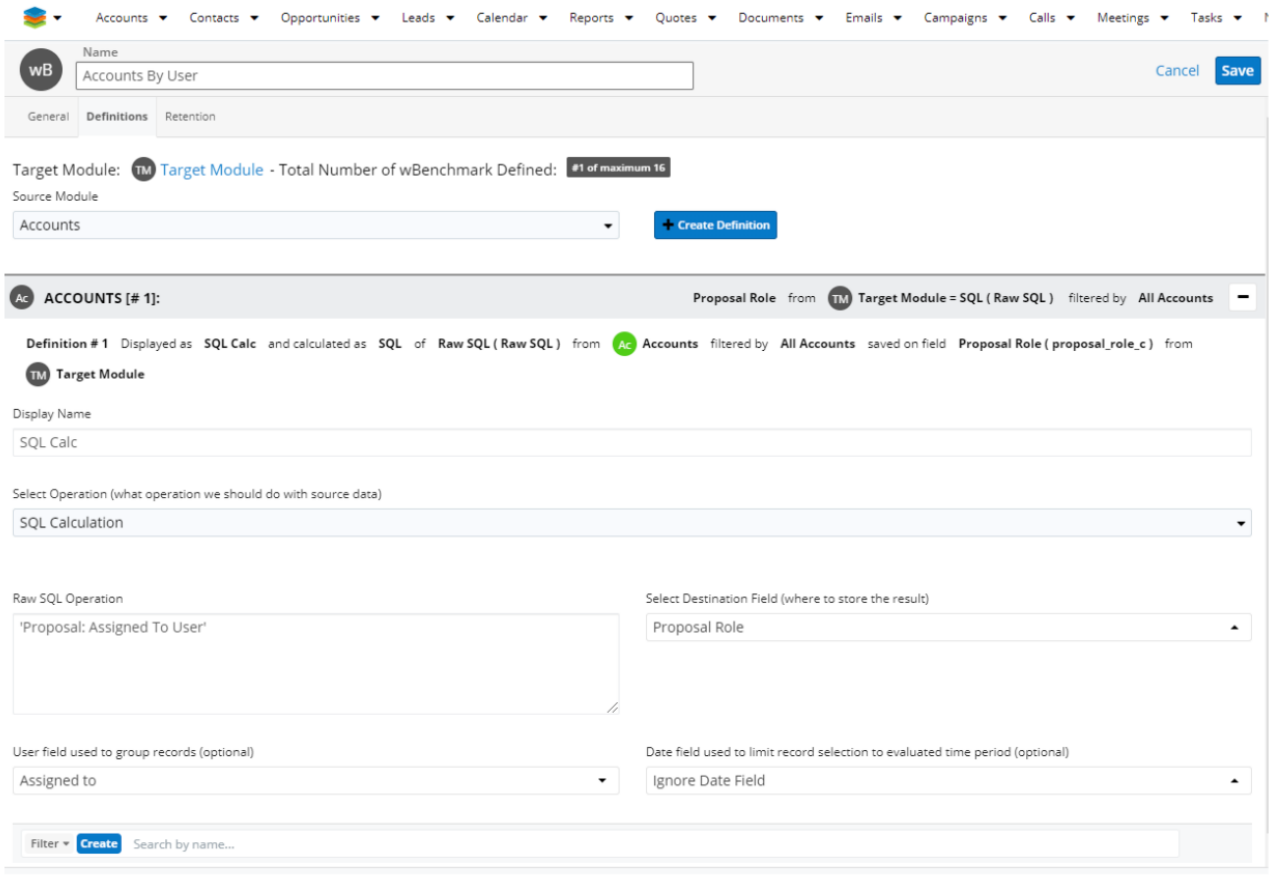

To use this record type, ensure that you create a new benchmark record and fill in all the fields from the image below.



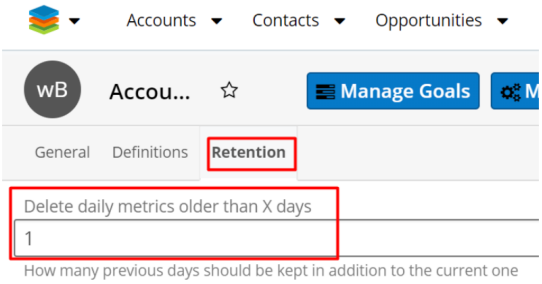

Ensure to also add the attached users and teams.



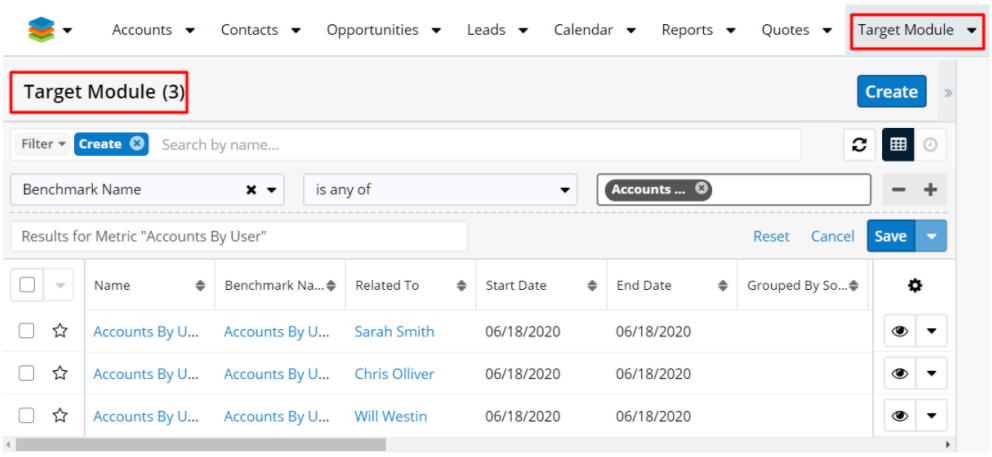

Go to the **Definitions** tab and add two definitions as it follows:




Go to the **Retention** tab and set the **Delete Daily Metrics** option to a value higher than X days =1:



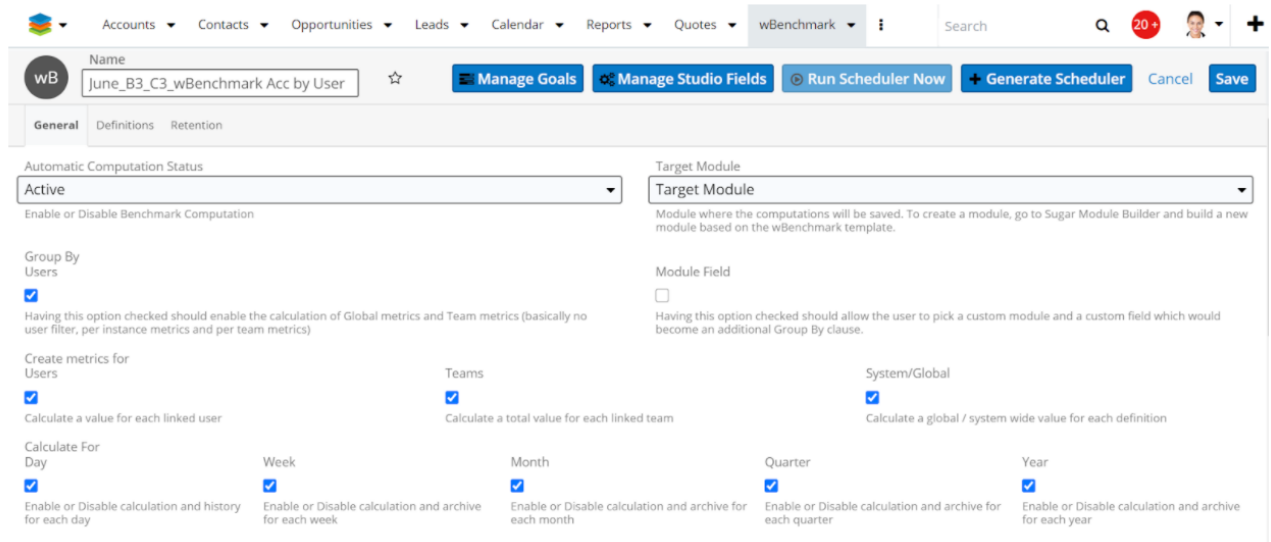

Save the benchmark record, **Generate Scheduler Job**, **Configure** and **Run Scheduler Now**. Go to the **Target Module** and see that the following computations are generated:



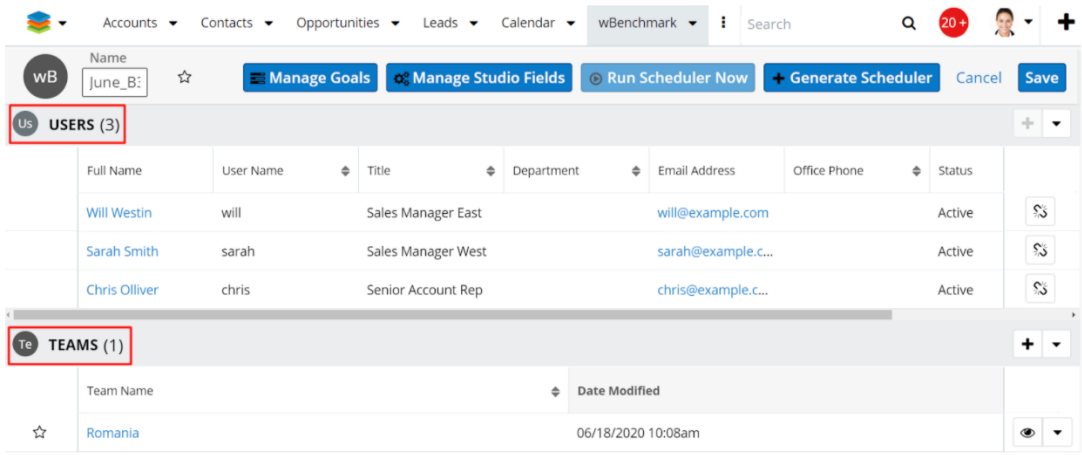

The benchmark computations are calculated only for linked Users, Users form linked Team and for the day when the computation was performed.

**Calculate metrics for: User, Teams and System/Global; Frequency: Day, Week, Month, Quarter, Year**

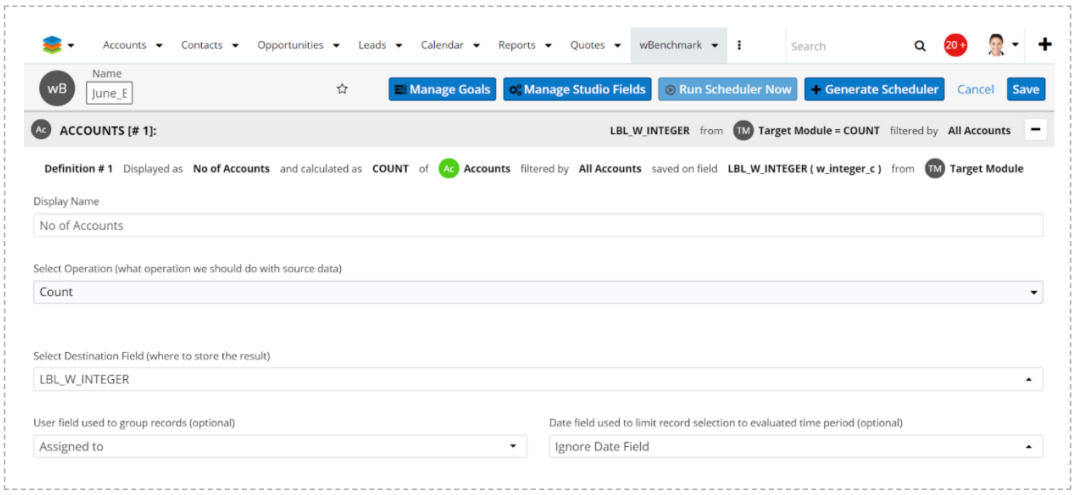
Create a new benchmark record and fill in all the fields from the following image. Ensure to also add the attached users and teams.

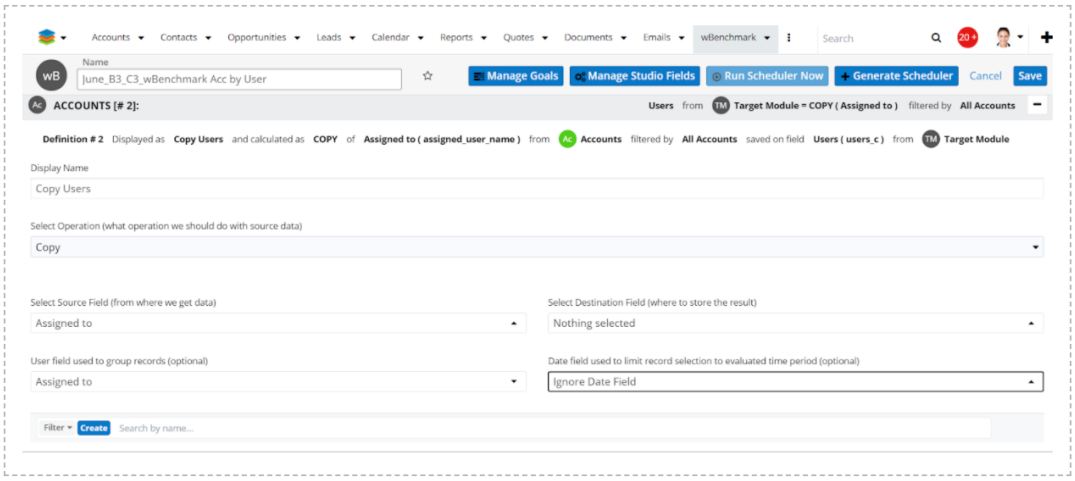


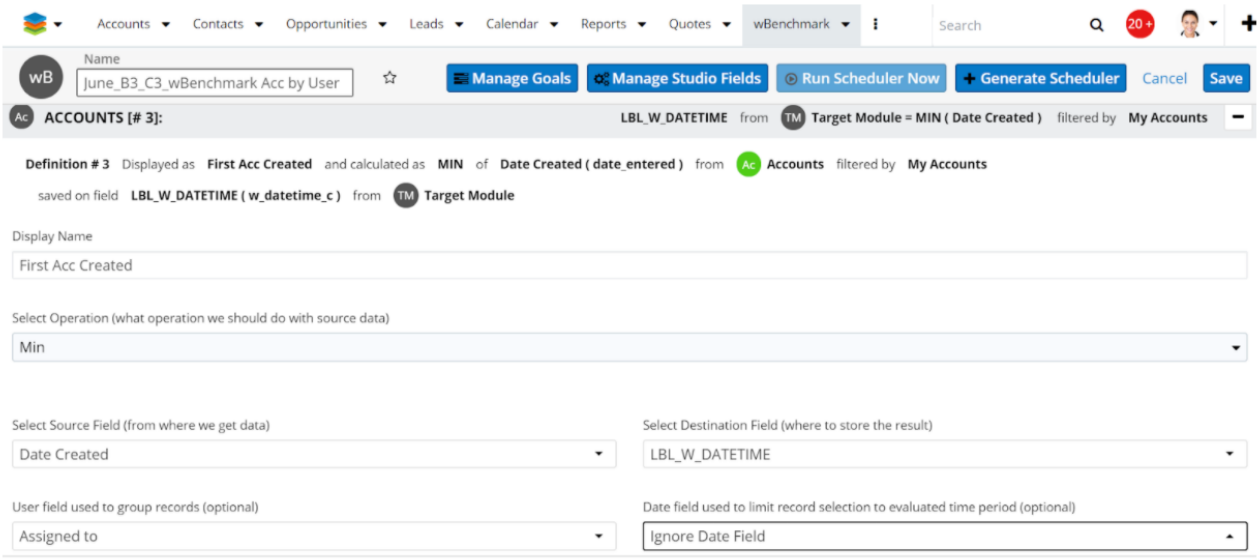

Ensure to also add the attached **Users** and **Teams**.



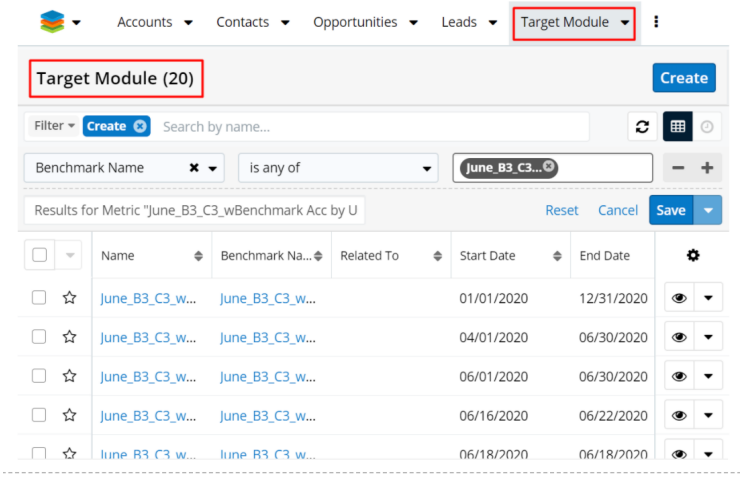

Go to the **Definitions** tab and add three definitions as follows:



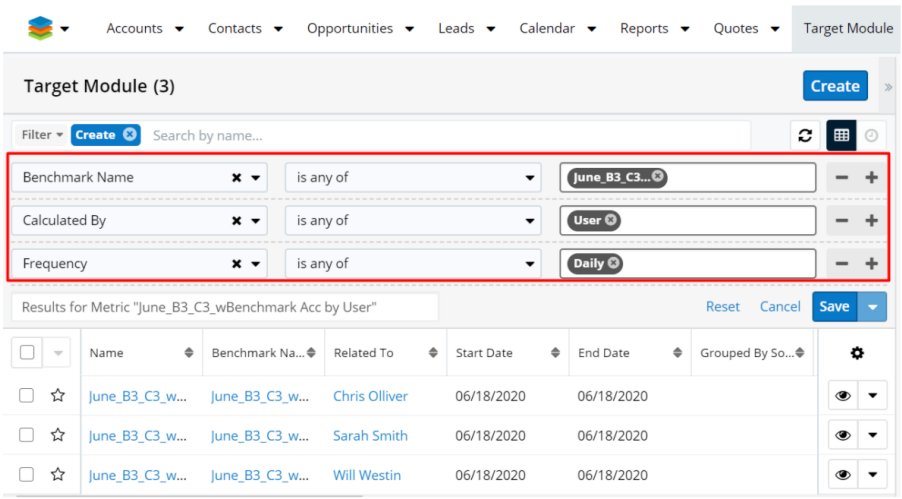



Save the benchmark record, Generate Scheduler Job, Configure and Runs Scheduler Now. Go to **Target Module** and see that the following computations are generated.

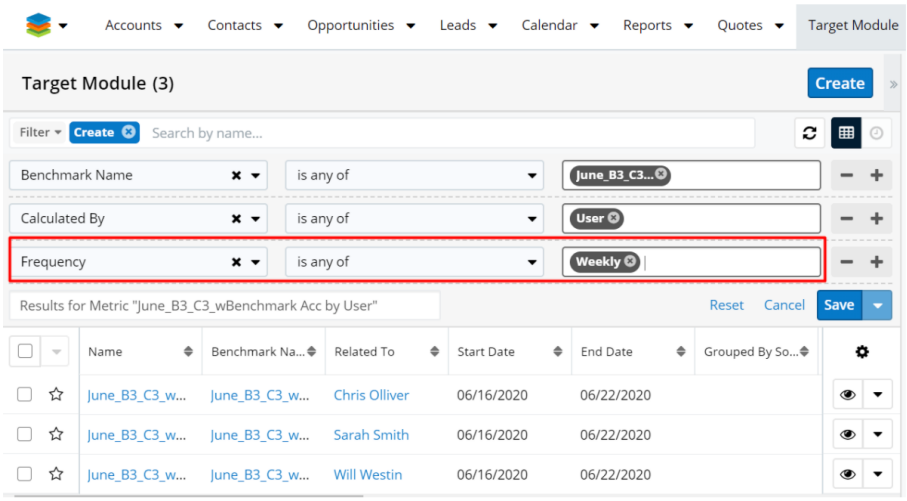



## User Daily Computations:

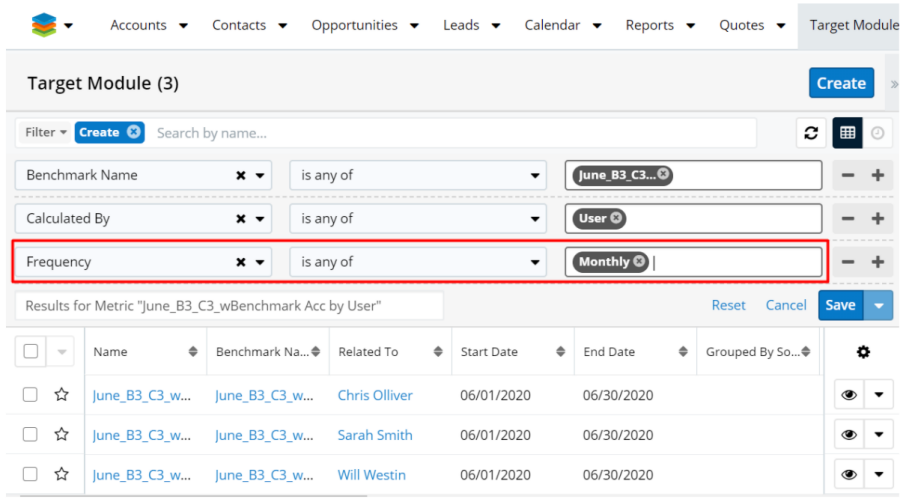
The benchmark computations are calculated for the linked **Users**, **Users form the linked Team**, and for the **Day** when the computation was performed.




## User Weekly Computations:

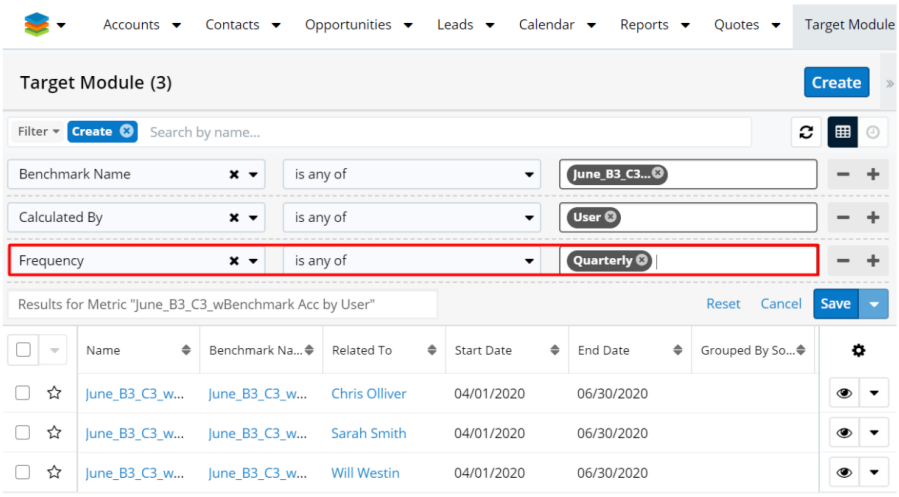



## User Monthly Computations:



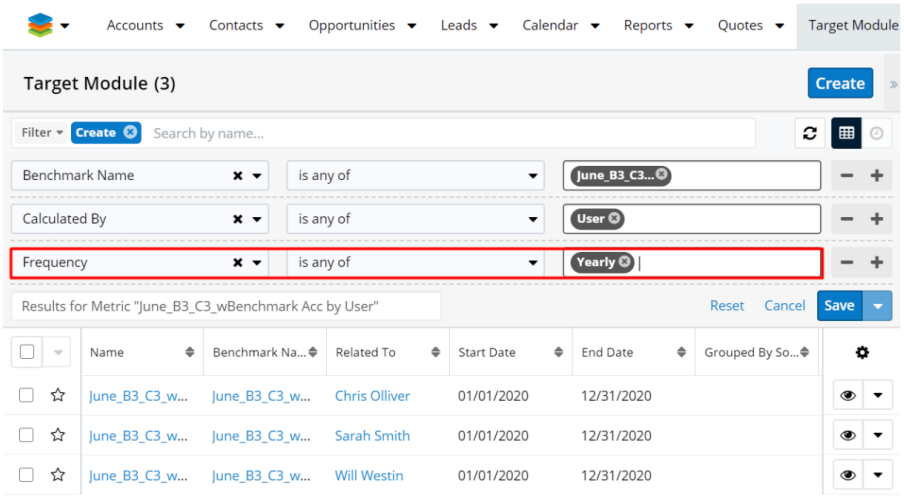
The benchmark computations are calculated for linked the **Users** , **Users form the linked Team,** and for the **Month** when the computation was performed.

### User Quarterly Computations




The benchmark computations are calculated for the linked **Users**, **Users form the linked Team**, and for the **Quarter** when the computation was performed.

### User Yearly Computations



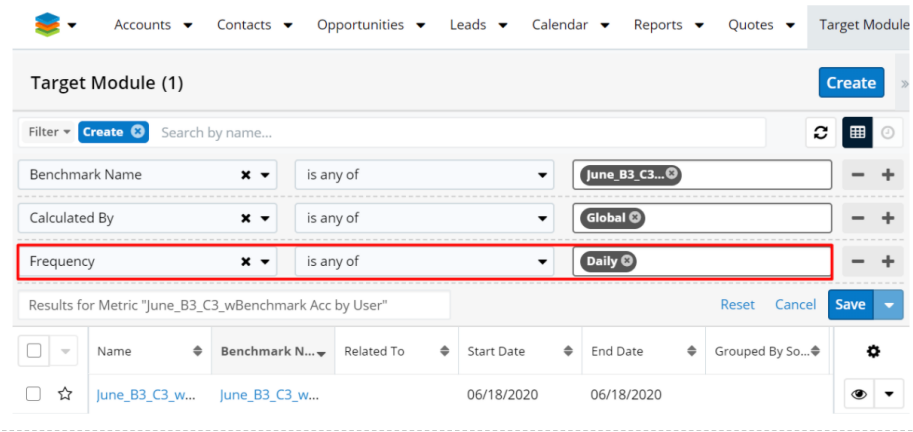

The benchmark computations are calculated for the linked Users, Users form the linked Team and for the year when the computation was performed.

### Team Daily, Weekly, Monthly, Quarterly and Yearly Computations

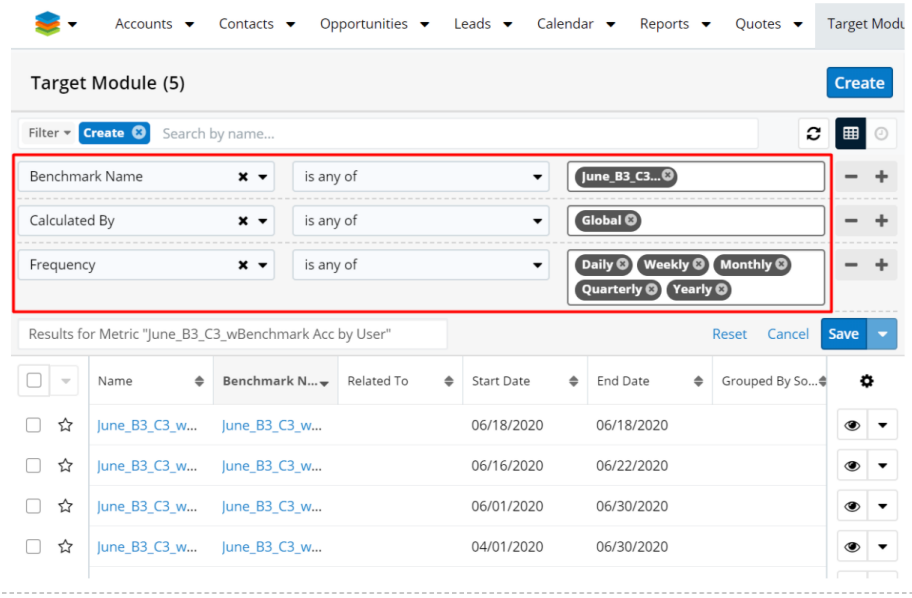
The benchmark computations are calculated also for the linked Team, as a whole,

and for the day, week, month, quarter, year when the computation was performed.

### System/Global Daily Computations

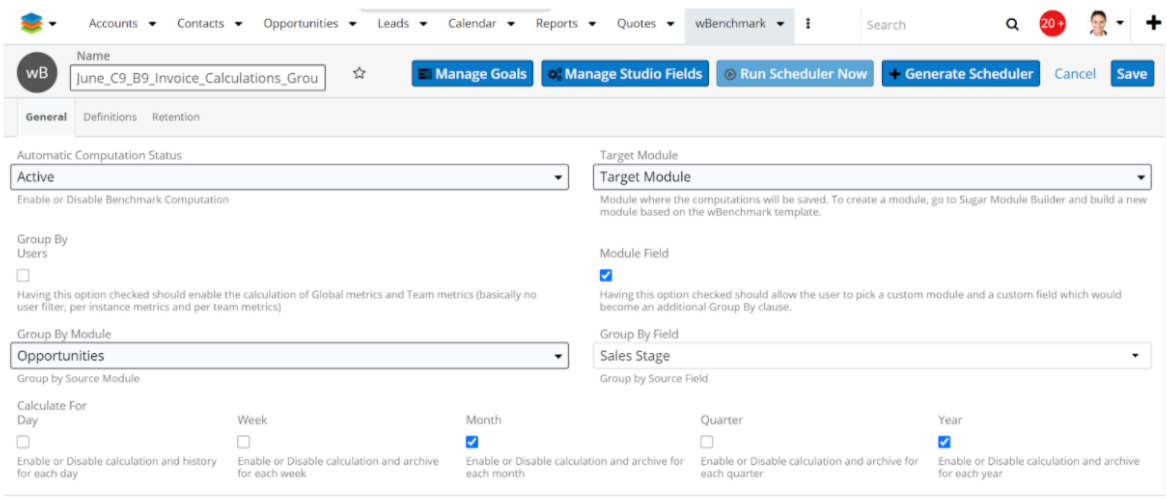



The benchmark computations are also calculated for **System/Global,** for the **Day**, **Week**, **Month**, **Quarter**, or **Year** when the computation was performed.

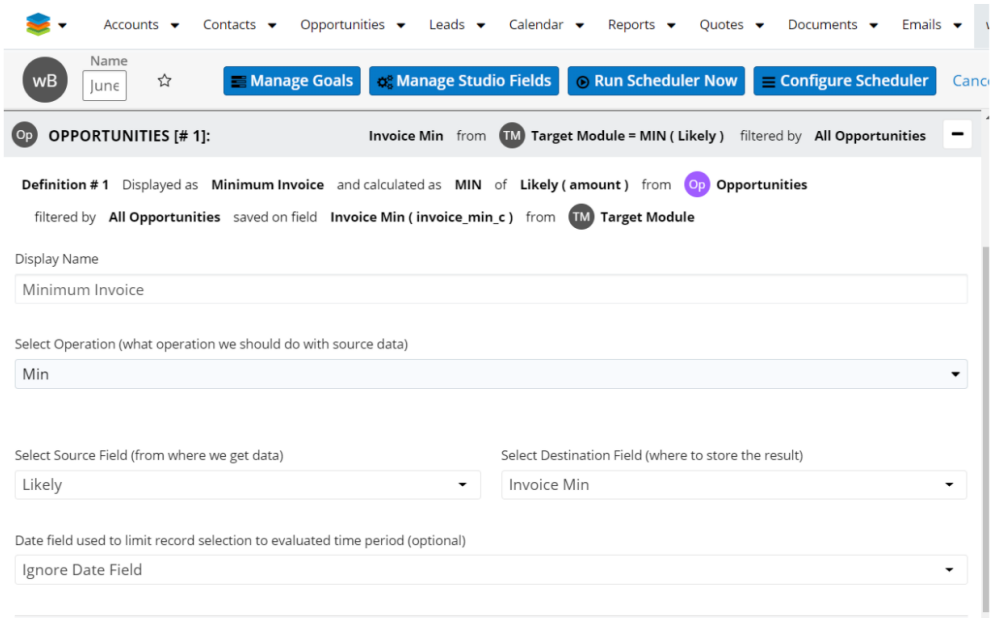


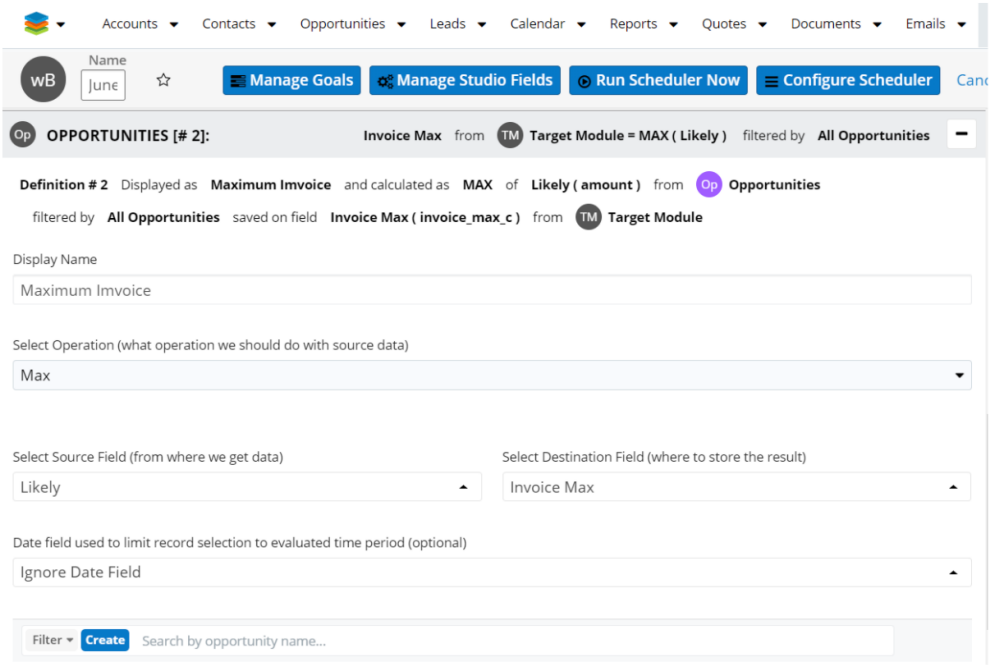

### Case 2: Group by Module Field

Create a new benchmark record and fill in all the fields from the following image. Also ensure that the Users/Teams subpanels are NOT available.



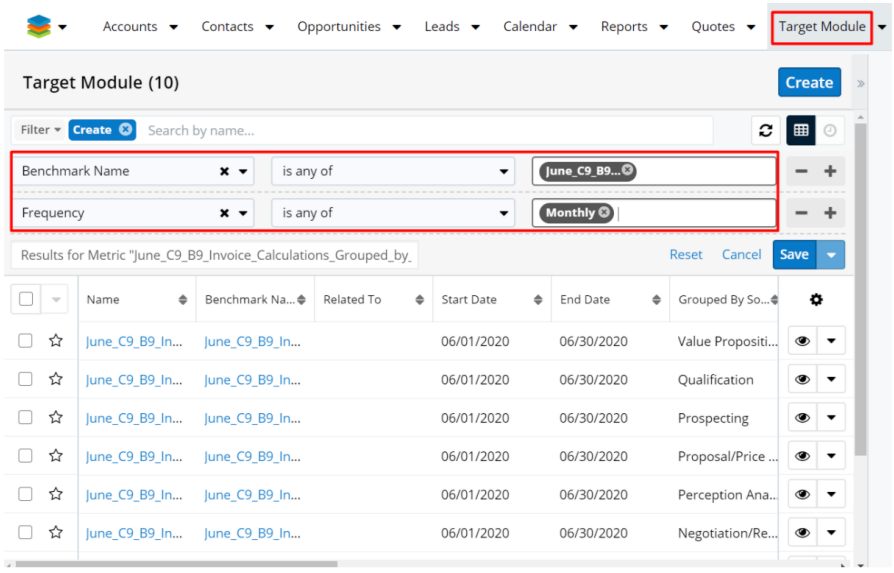

Go to the **Definitions** tab and add two definitions as follows:





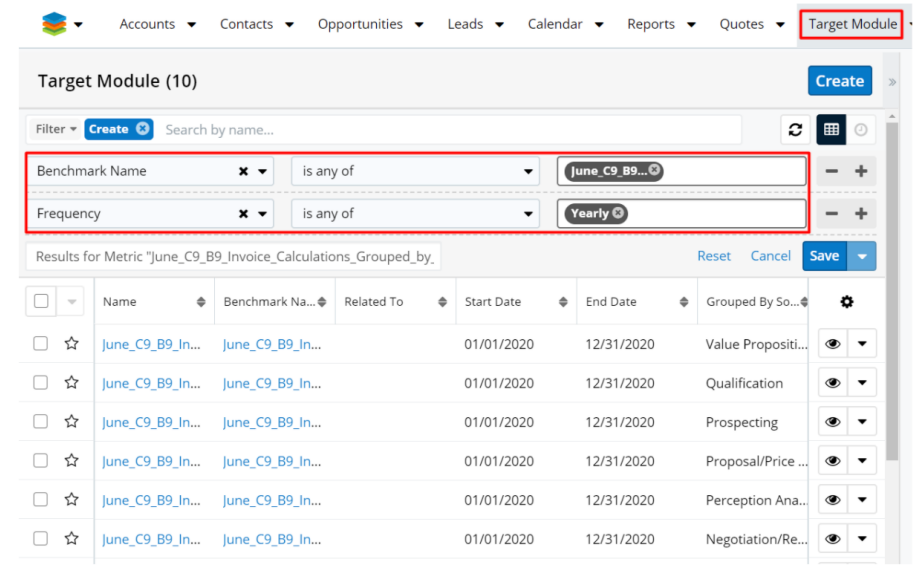

Save the benchmark record, Generate Scheduler Job, Configure and Runs Scheduler Now. Go to Target Module and see that the following computations are generated.

### Monthly Computations Grouped by Module Field for the Sales Stage




The benchmark computations are calculated for each value of the selected **Module Field** , for the **Month** when the computation was performed.

### Yearly Computations Grouped by Module Field for the Sales Stage




The benchmark computations are calculated for each value of the selected **Module Field** and for the **Year** when the computation was performed.

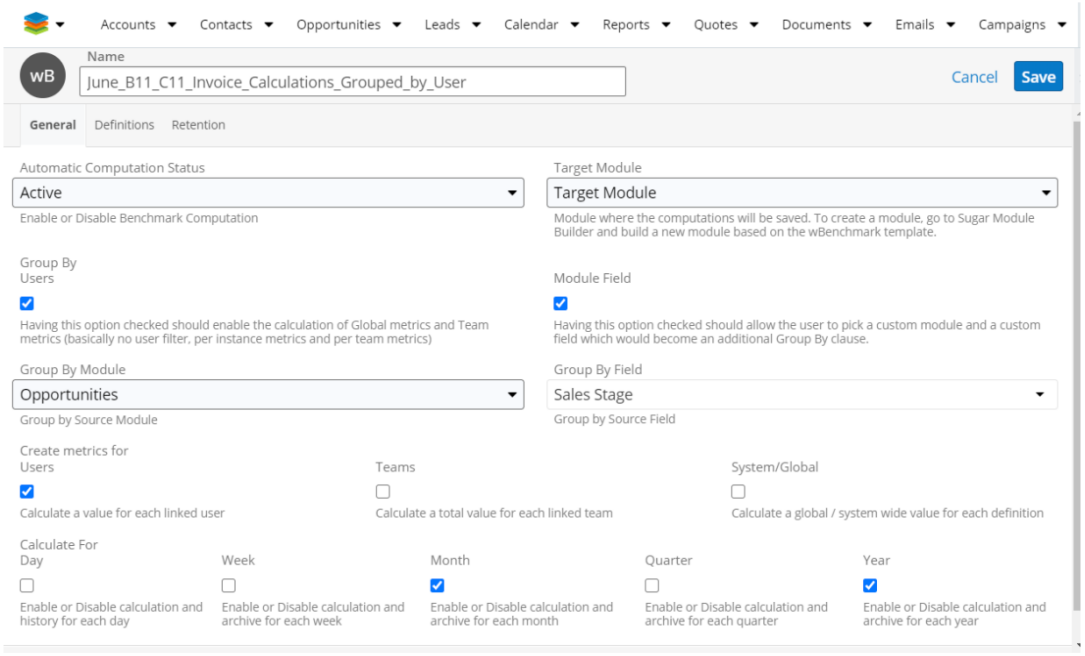
### Case 3: Group by Users and Module Field

### 1. Calculate metrics for: Users

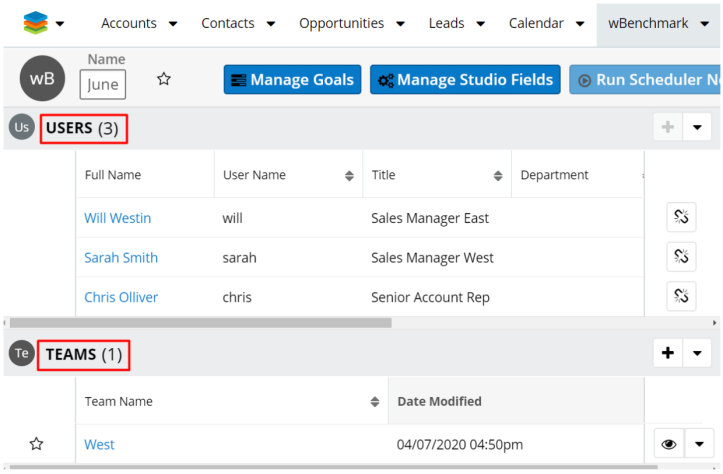
### Module Field: Sales Stage

### Frequency: Month, Year

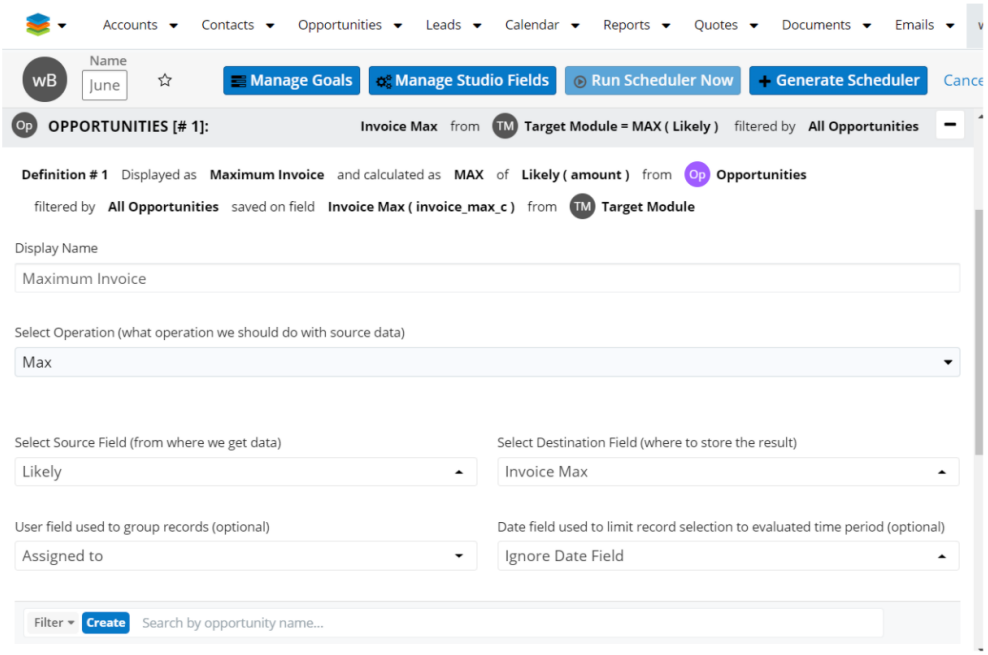
Create a new benchmark record and fill all the fields from the following image.

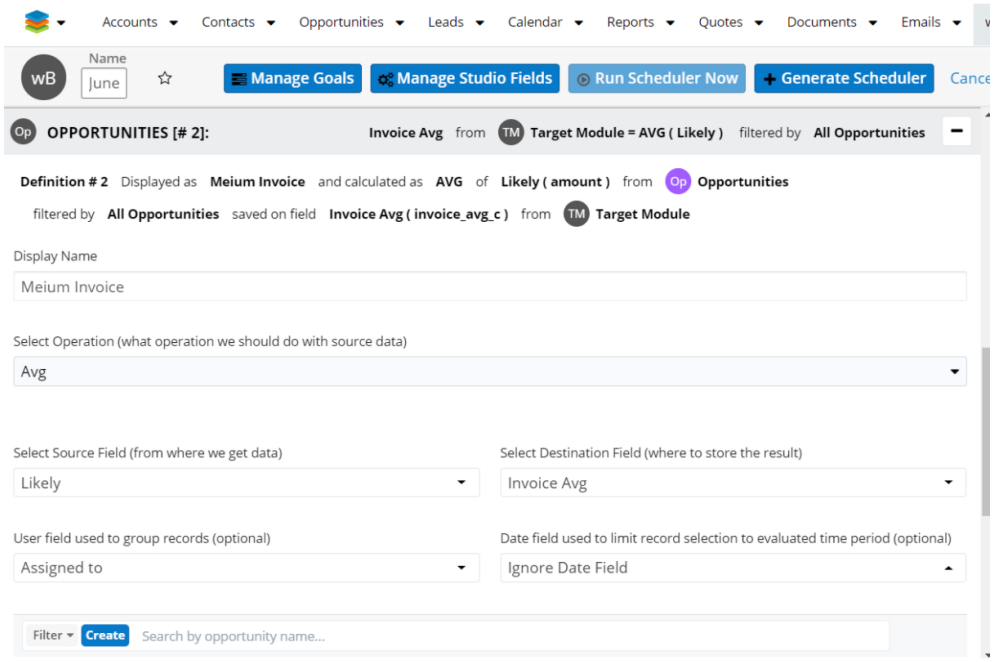



Ensure that the **Users** and **Teams** subpanels are available and will be filled with the attached details.



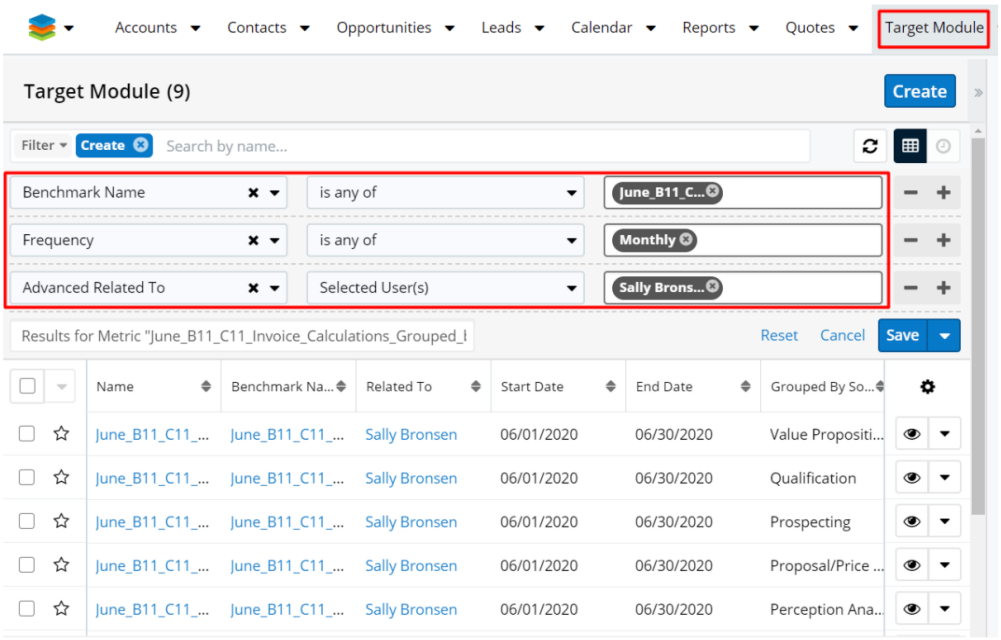

Go to the **Definitions** tab and add two definitions as follows:



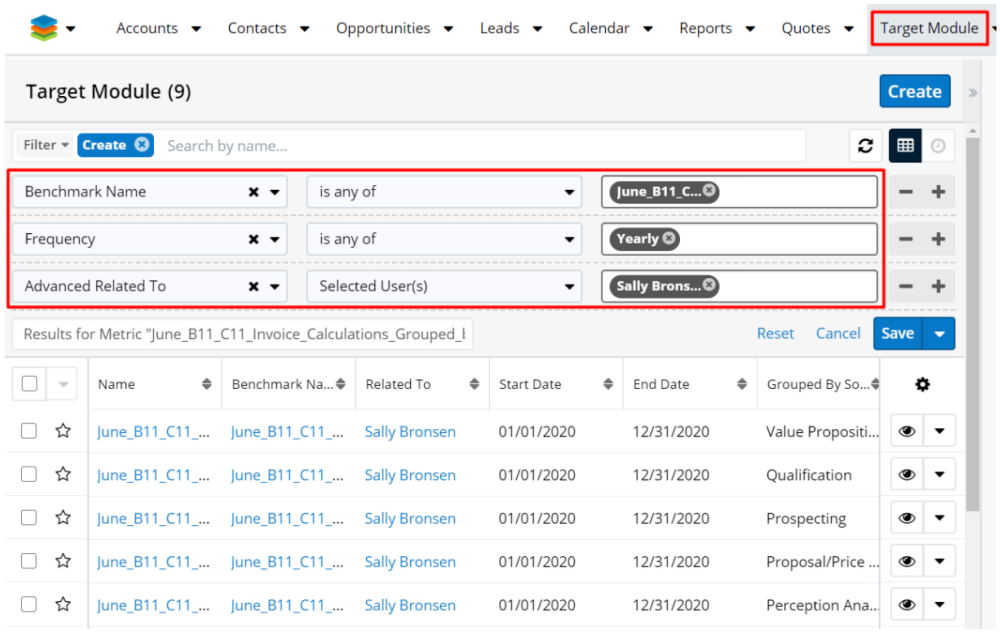




Save the benchmark record, Generate Scheduler Job, Configure and Runs Scheduler Now. Go to Target Module and see that the following computations are generated.

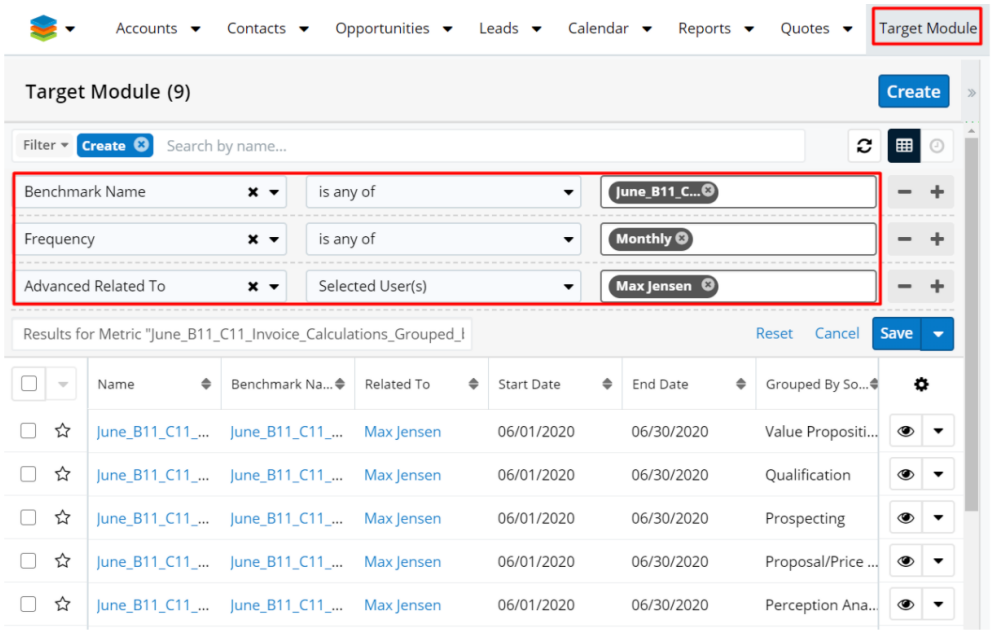
Monthly computations **Grouped by User = Sally Bronsen** and module field **Sales Stage:**



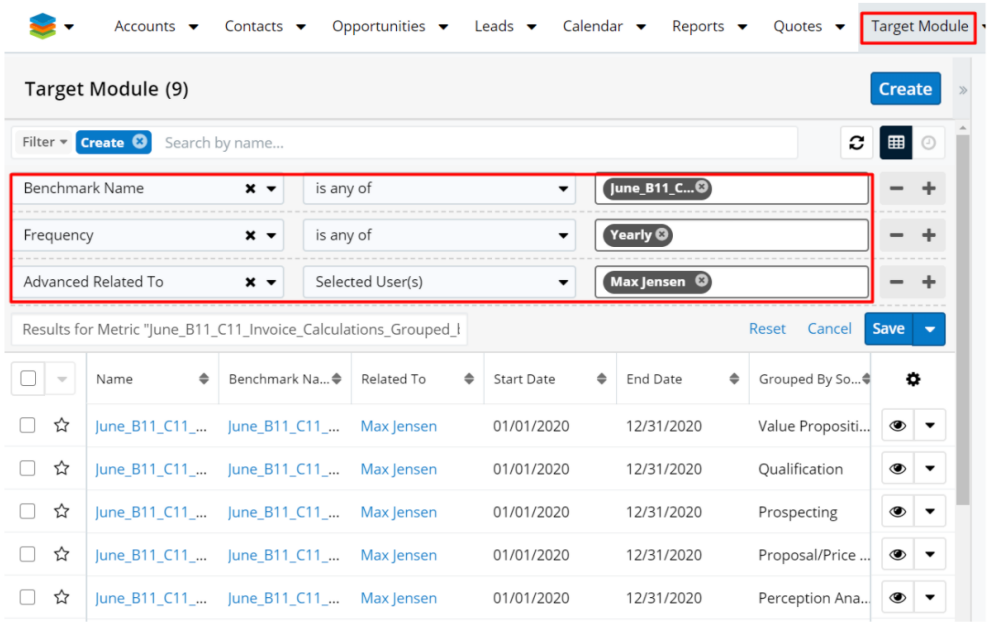

Yearly computations **Grouped by User = Sally Bronsen** and module field **Sales Stage**:



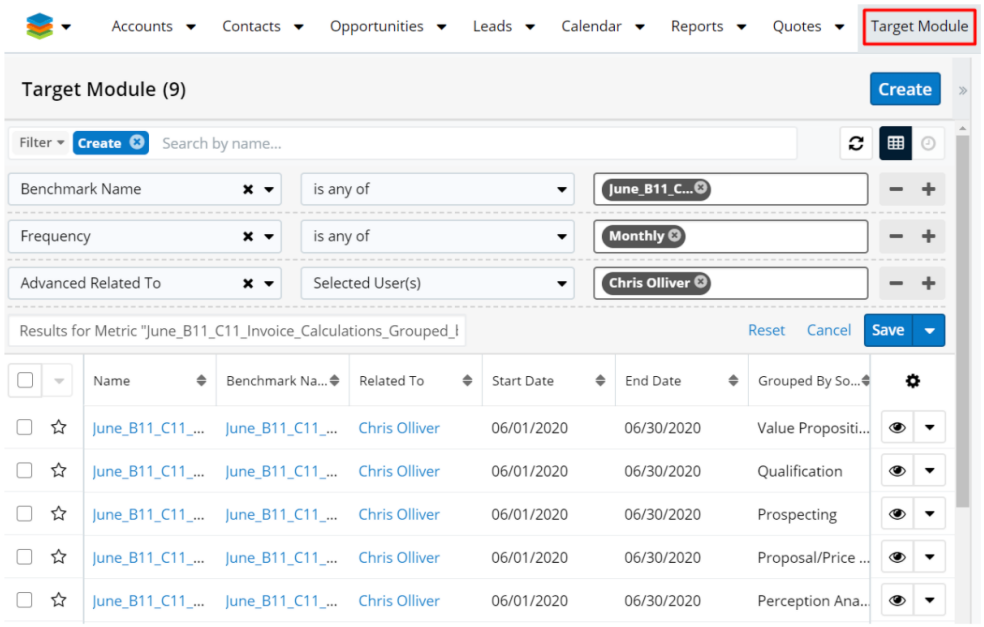

Monthly computations **Grouped by User = Max Jensen** and module field **Sales Stage**:



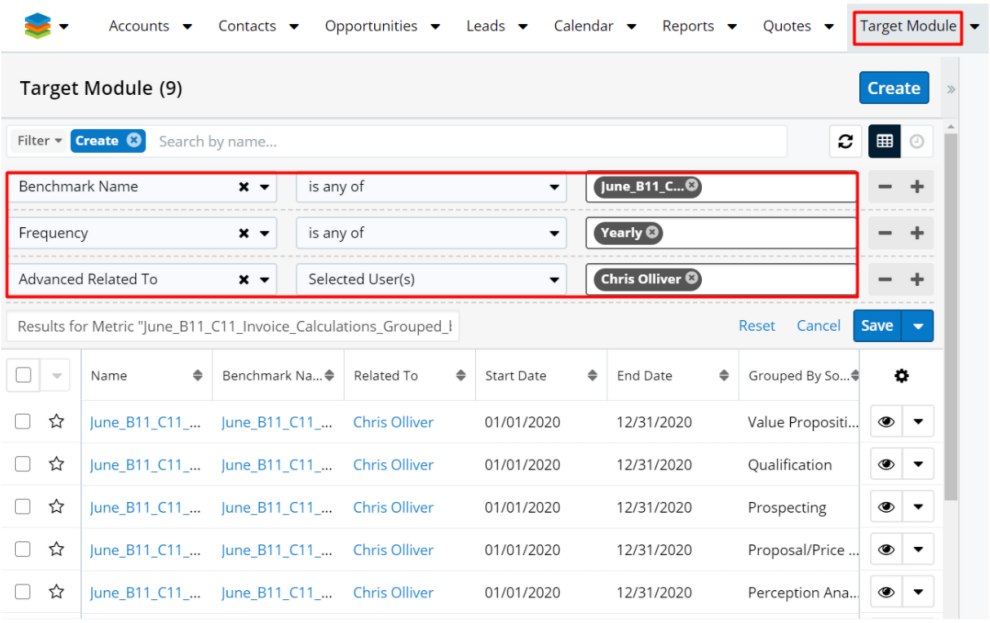

Yearly computations **Grouped by User = Max Jensen** and module field **Sales Stage**:



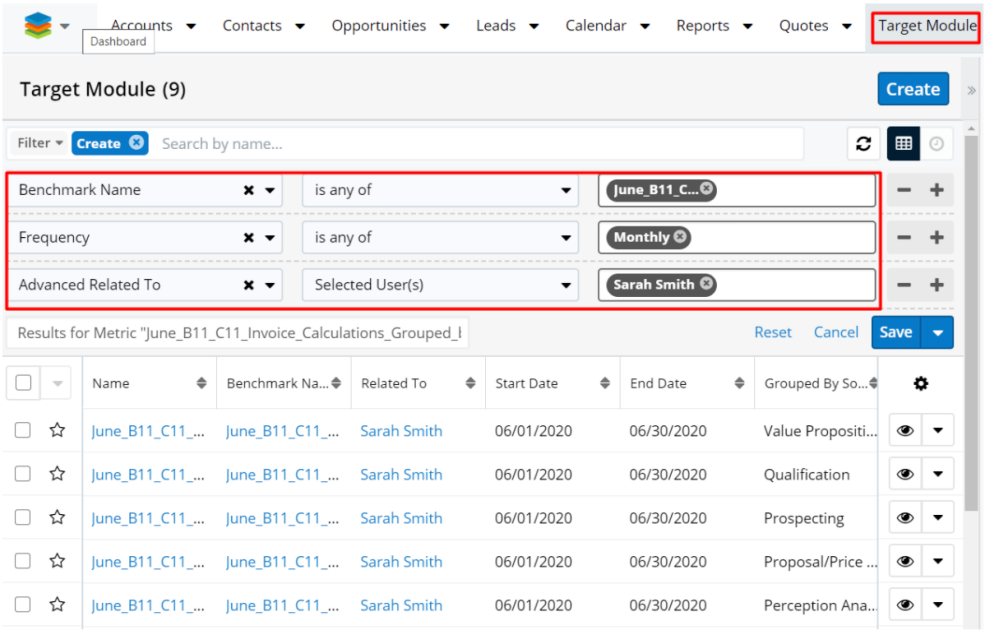

Monthly computations **Grouped by User = Chris Oliver** and module field **Sales Stage**:



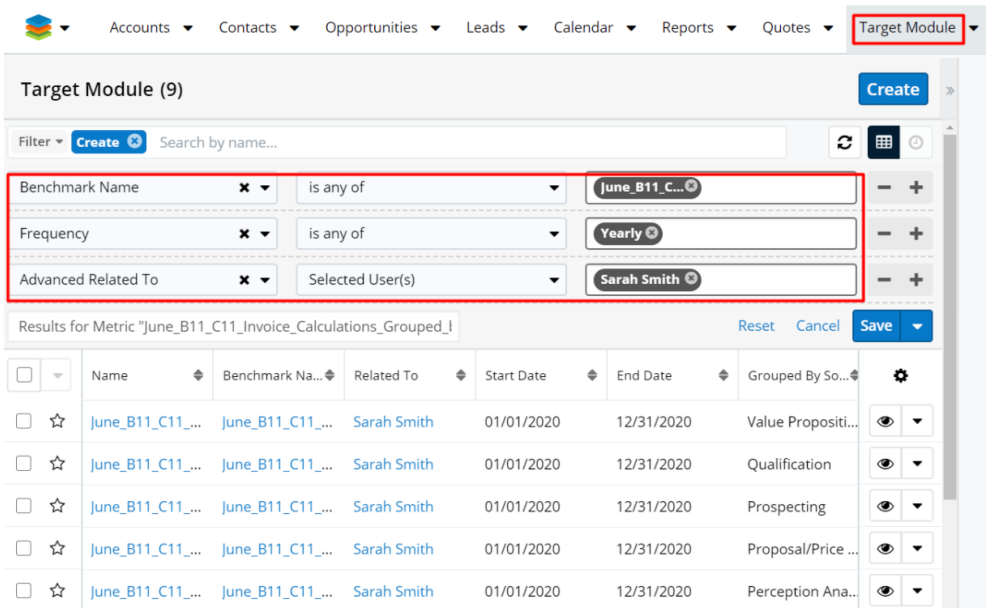

Yearly computations **Grouped by User = Chris Oliver** and module field **Sales Stage**:



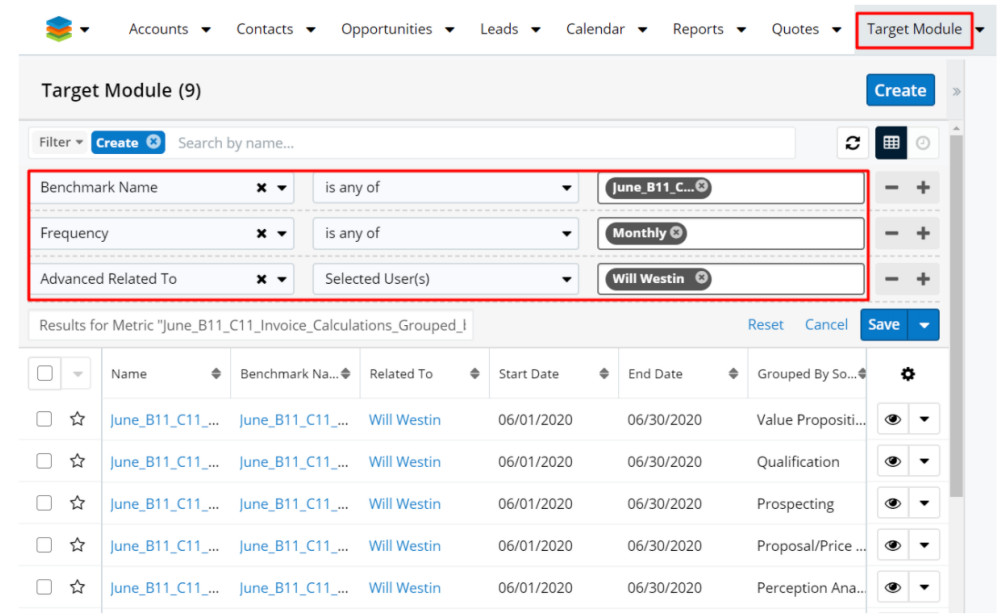

Monthly computations **Grouped by User = Sarah Smith** and module field **Sales Stage**:



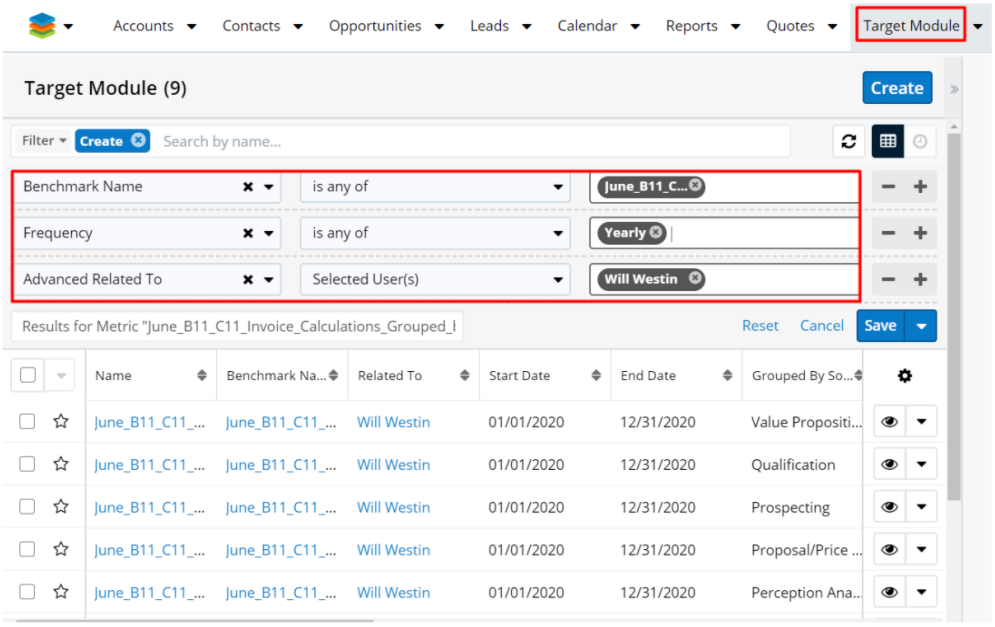

Yearly computations **Grouped by User = Sarah Smith** and module field **Sales Stage**:



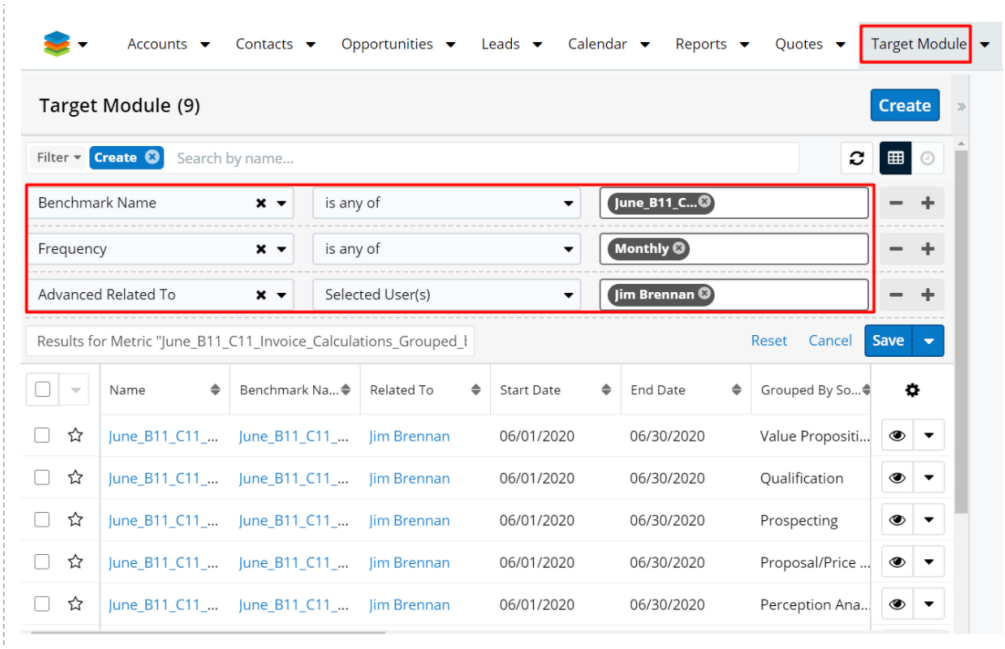

Monthly computations **Grouped by User = Will Westin** and module field **Sales Stage**:



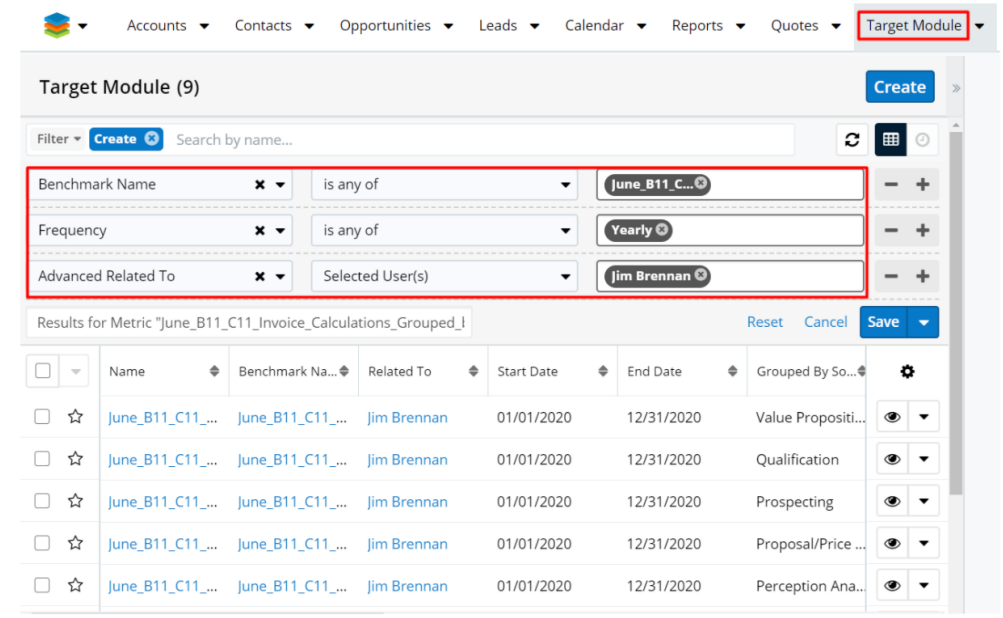

Yearly computations **Grouped by User = Will Westin** and module field **Sales Stage**:




Monthly computations **Grouped by User = Jim Brennan** and module field **Sales Stage:**




Yearly computations **Grouped by User = Jim Brennan** and module field **Sales Stage**:

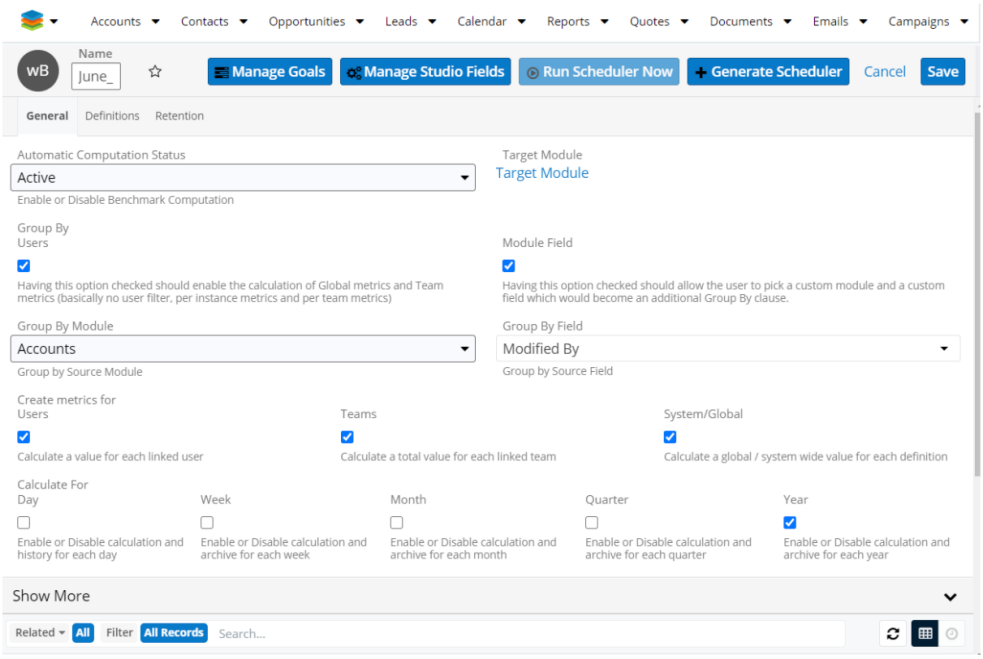



## 2. Calculate metrics for: Users, Teams, and System/Global

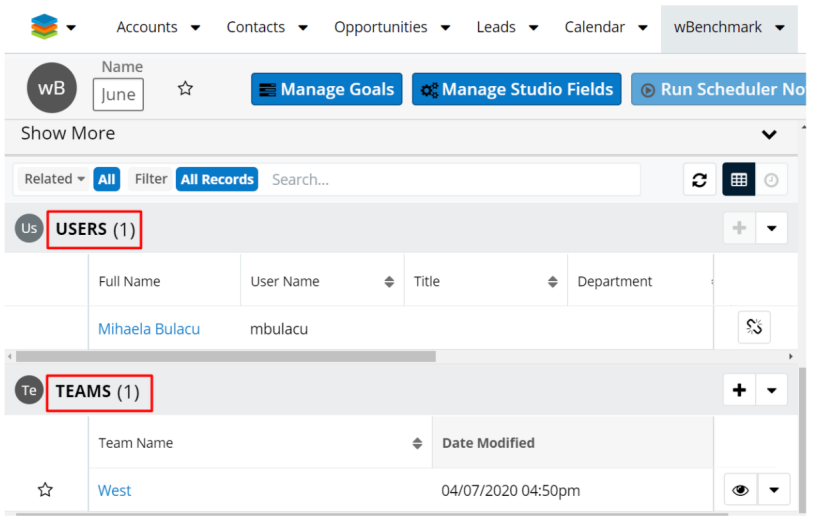
## Module Field: Account - Type

## Frequency: Yearly

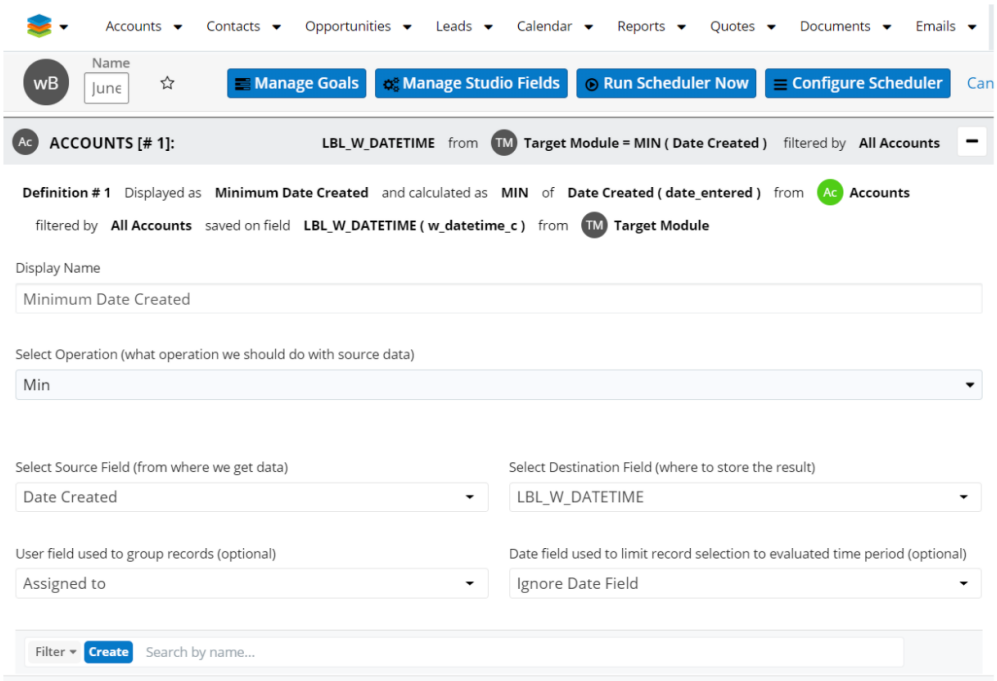
Create a new benchmark record and fill in all the fields from the following image.

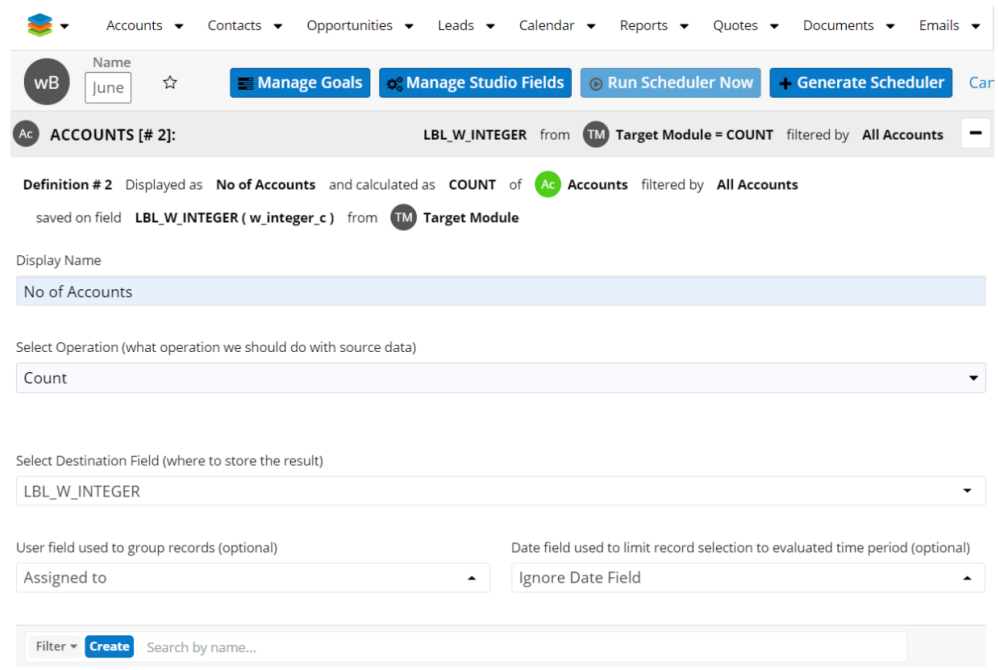



Ensure that the **Users** and **Teams** subpanels are available and will be filled with the attached details.



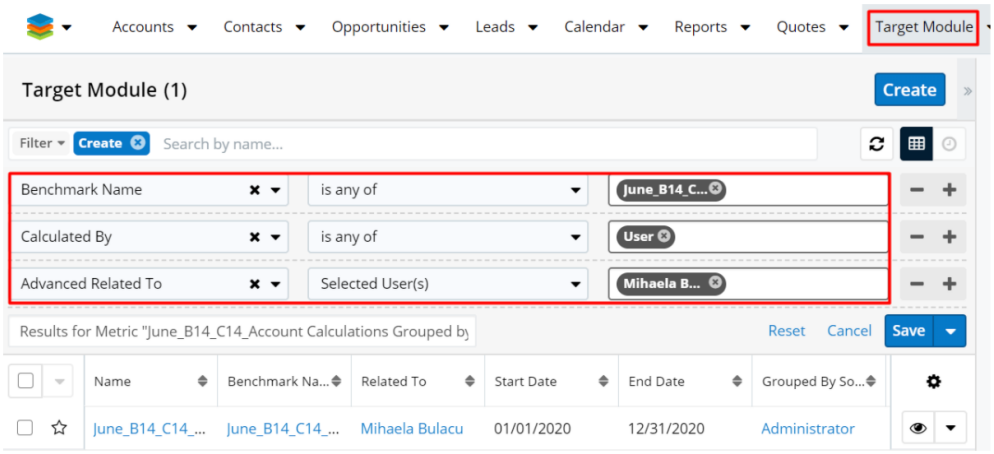

Go to the **Definitions** tab and add two definitions as follows:




Save the benchmark record, Generate Scheduler Job, Configure and Runs Scheduler Now. Go to Target Module and see that the following computations are generated.

**Yearly Computations Grouped by User and Module Field Set to Account Type:**



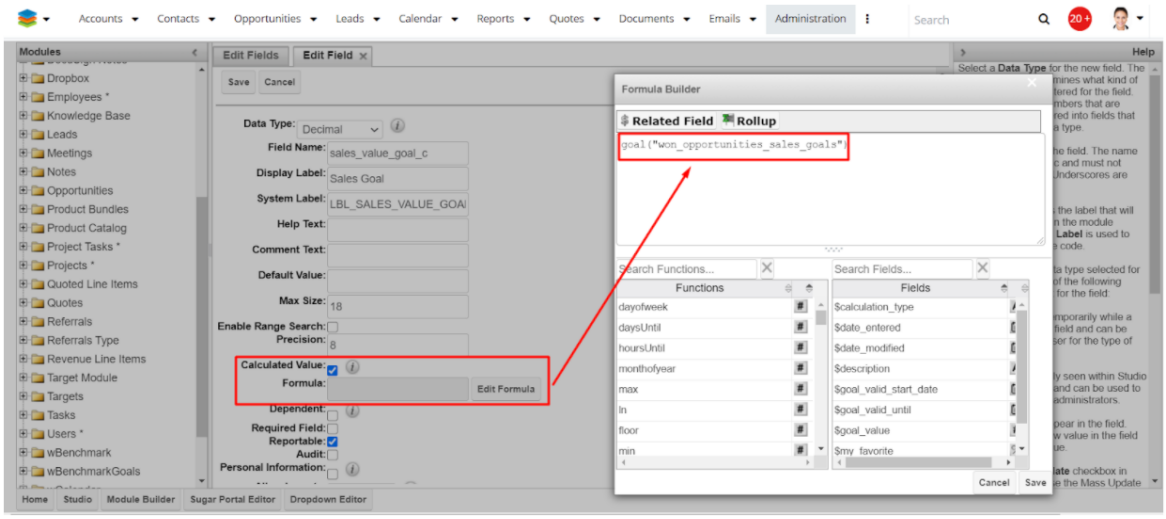

The benchmark computations are calculated for each value of the selected **Module Field** , for each **Linked User** , and for the **Year** when the computation was performed.

# Goals

- Goal Formulas
- Creating Goals
- Uploading Goals

## Goal Formulas

The **Goal Formula** will be added in the **Formula Builder** ( **on Target Module)** of a **calculated field in Sugar Studio**:

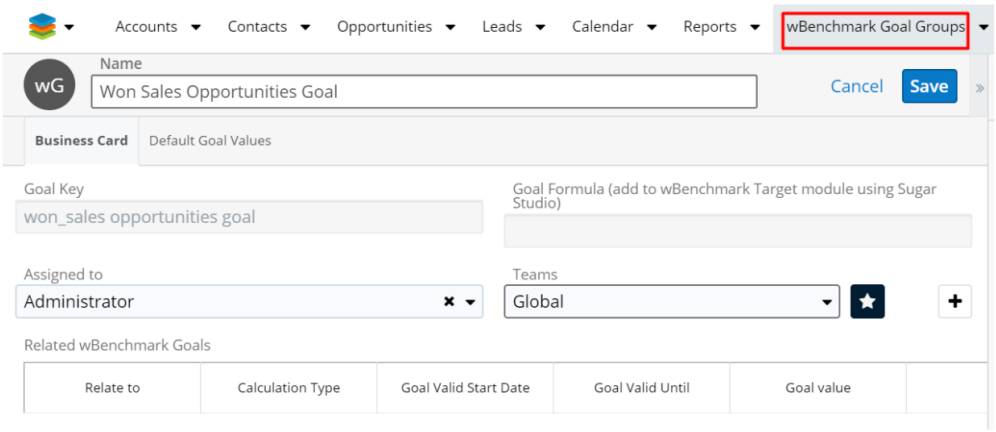


### Creating Goals

Two modules are used to create a goal:

- **The wBenchmark Goal Group module** (#sys_wMetricGoals) this is the main module, where we will define types of goals. The module can be accessed via "Manage Goals" buttons from wBenchmark list view and record view.
- **'wBenchmark Goal Detail' module** (#sys_wTargetGoals) this module will store the Related wBenchmark Goals. The module is hidden by default as these records are created from a wBenchmark Goal Group record view.

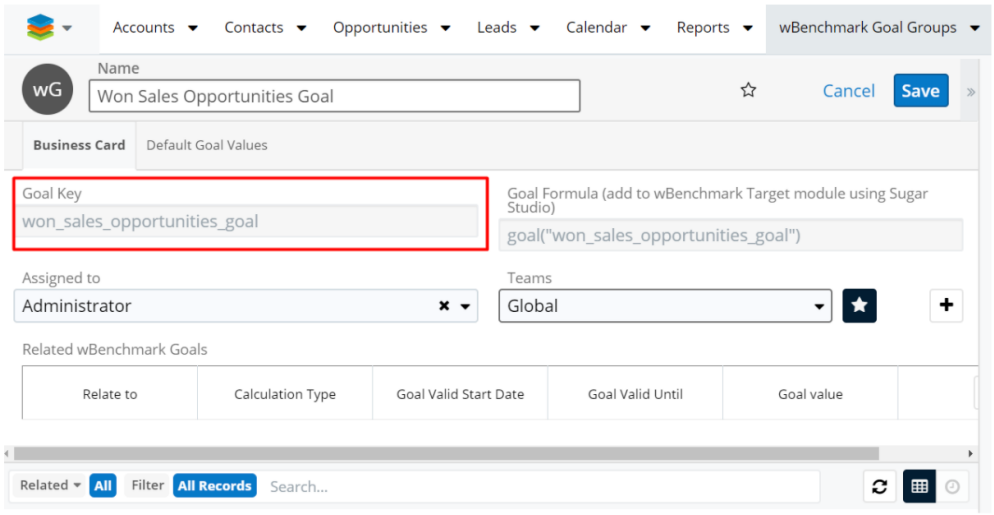
The first step is to create a record on '**wBenchmark Goal Group**' (sys_wMetricGoals) module.




Name is required and the other fields are calculated.

**Note**: The name should always have a unique value, therefore the record cannot be saved if a duplicate record is found. If the name is changed to a unique value and click on the drawer, the record can be saved.

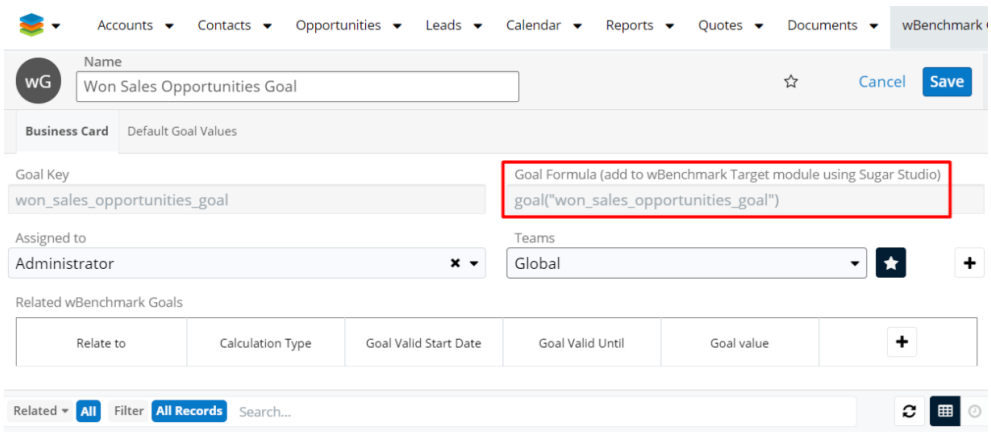
**The Goal Key** is calculated with the text from Name to lowercase where spaces are replaced with under- score ("_")




**Note**: If the name of the wBenchmark Goal Group record is "Won Sales Opportunities Goal" the Goal Key will be "won_sales_opportunities_goal".

'Goal Formula (add to wBenchmark Target module using Sugar Studio)' - this is an auto generated goal formula based on the Goal key.

**Note**: If the value of Goal Key is won_sales_opportunities_goal the value for Goal Formula will be goal("won_sales_opportunities_goal").

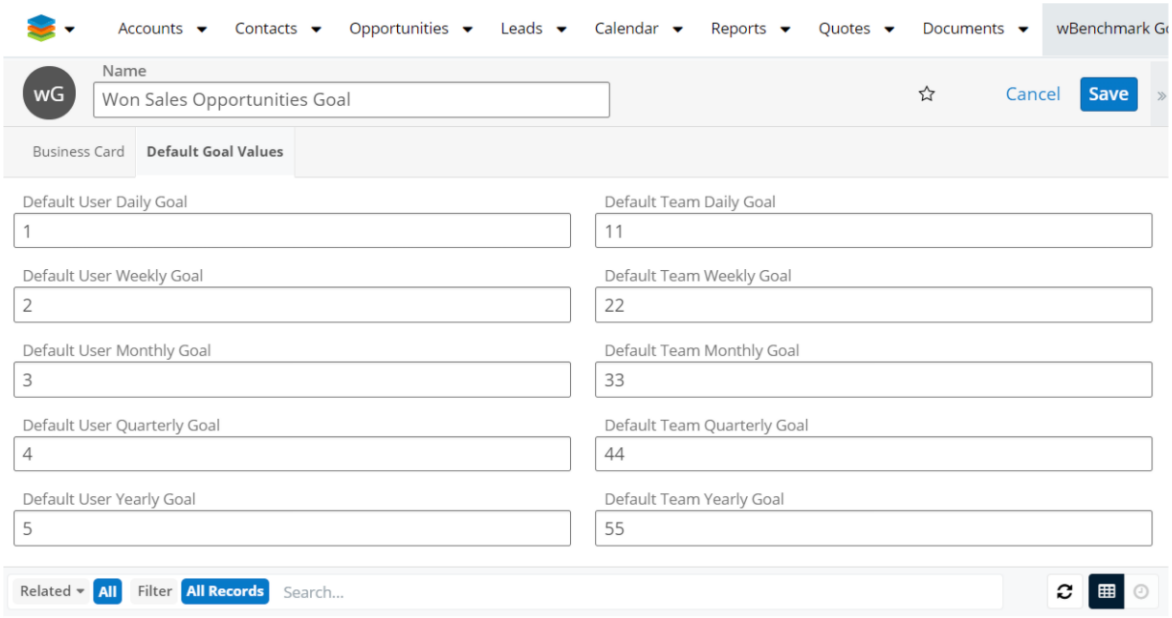



**Note**: This formula will be added to a calculated numeric field from the wBenchmarkTarget module.

**The Default Goal Values** tab contains fields that will be used for users and teams that do not have Related wBenchmark Goals defined individually or if the defined Related wBenchmark Goals are in a different time period.

The fields are the following:

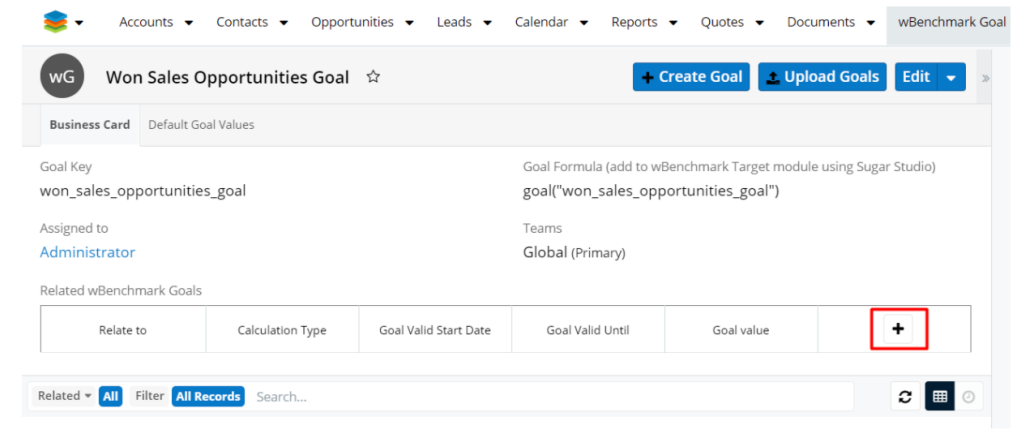
- **Default User Daily Goal**: for daily goal calculated for user
- **Default User Weekly Goal:** for weekly goal calculated for user
- **Default User Monthly Goal**: for monthly goal calculated for user
- **Default User Quarterly Goal**: for quarterly goal calculated for user
- **Default User Yearly Goal**: for yearly goal calculated for user
- **Default Team Daily Goal**: for daily goal calculated for team
- **Default Team Weekly Goal**: for weekly goal calculated for team
- **Default Team Monthly Goal**: for monthly goal calculated for team
- **Default Team Quarterly Goal**: for quarterly goal calculated for team
- **Default Team Yearly Goal**: for yearly goal calculated for team



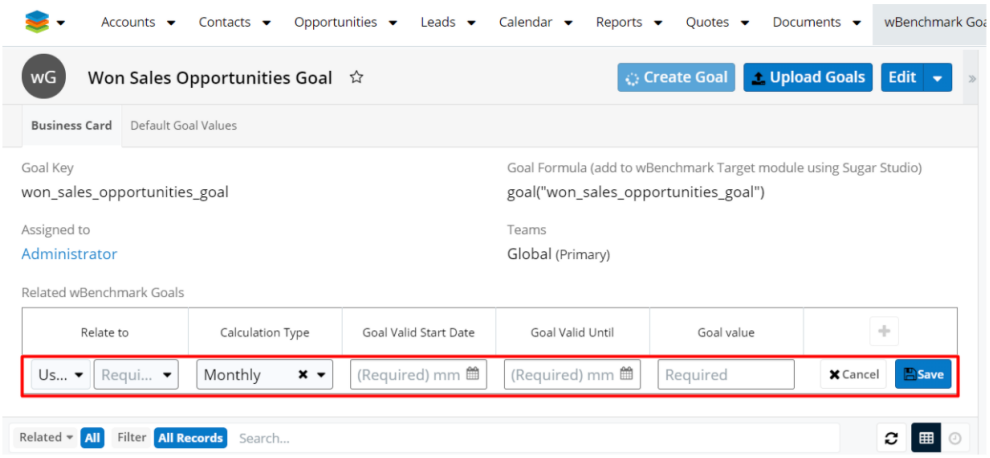

After saving the "**wBenchmark Goal Group**" record, the following section is available on record view:

The Related **wBenchmark Goals** are wTargetGoal records linked to the current **wBenchmark Goal Group**.

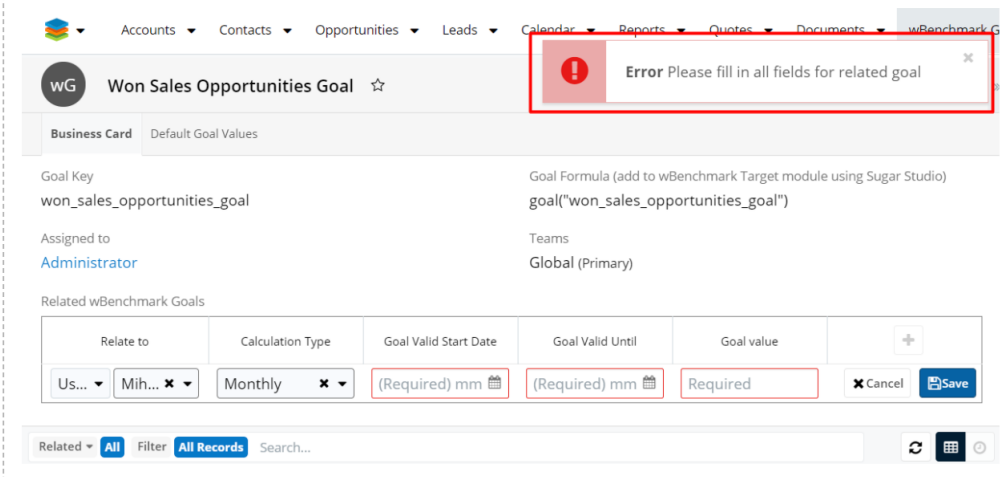
On the **Related wBenchmark Goals** sections, from **'wBenchmark Goal Group'** record view, new goals can be added by using the **"+"** button.




When the **"+"** button is pressed, a new row in edit mode is added to the Related wBenchmark Goals.

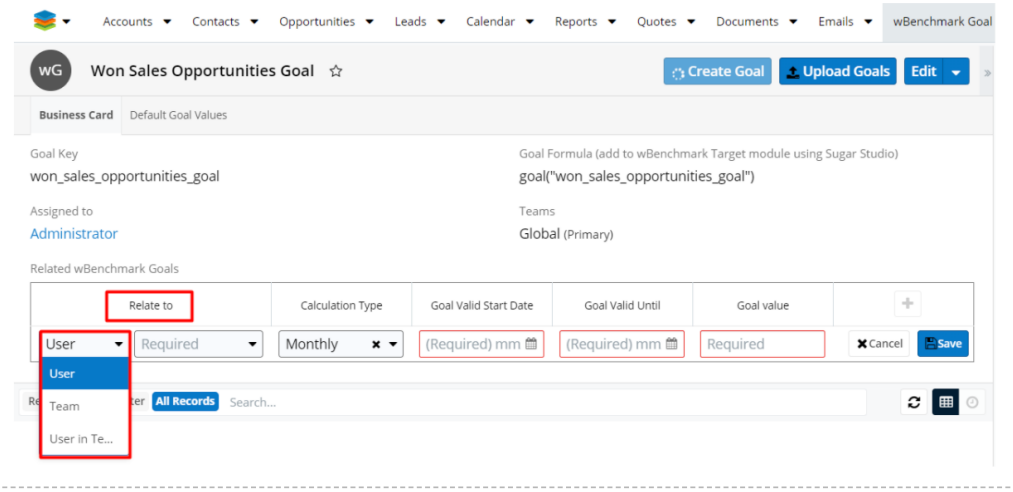



On Related wBenchmark Goals all fields are required; an error will be displayed if a field is empty:

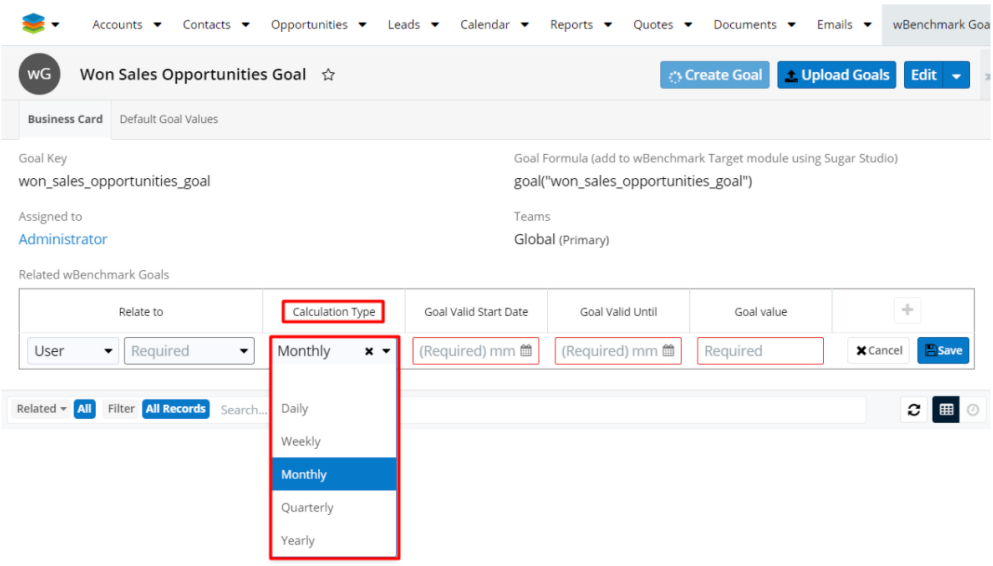


**Relate To**: On the **Relate To** column, the following options are available:

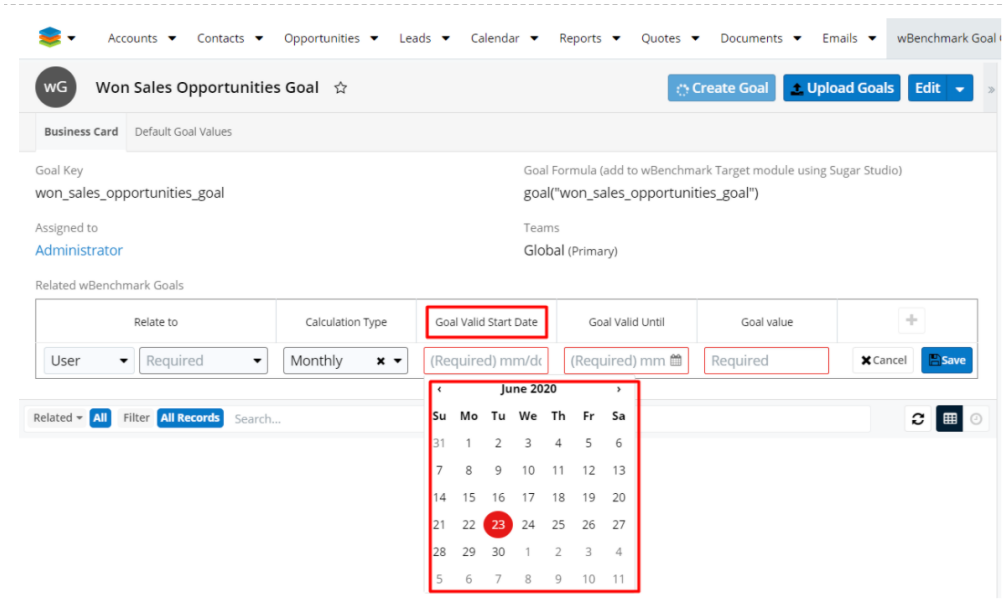
- **User:** a user can be selected and goals can be defined for that user
- **Team**: a team can be selected and goals can be defined for that team
- **User in Team**: a team can be selected and goals can be defined for the users from that team



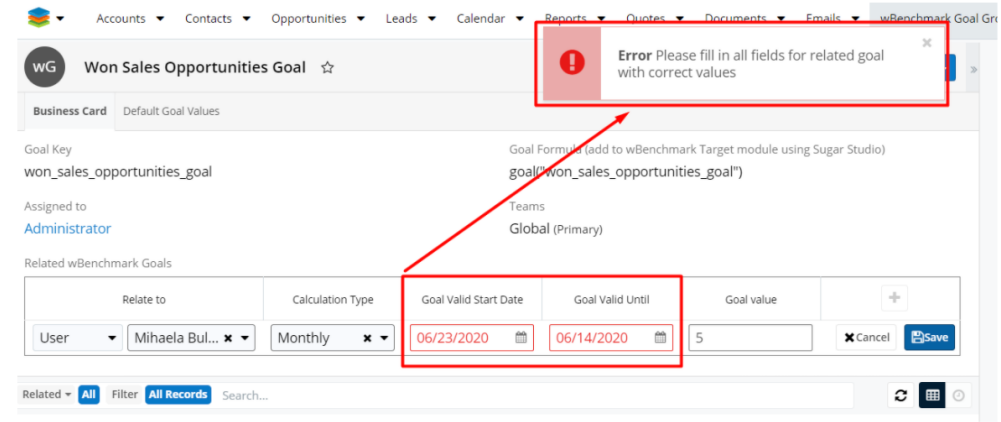

**Calculation Type** is the equivalent for the **Frequency** field from a wBenchmarkTarget module. The calculation types are: Daily, Weekly, Monthly, Quarterly, Yearly.



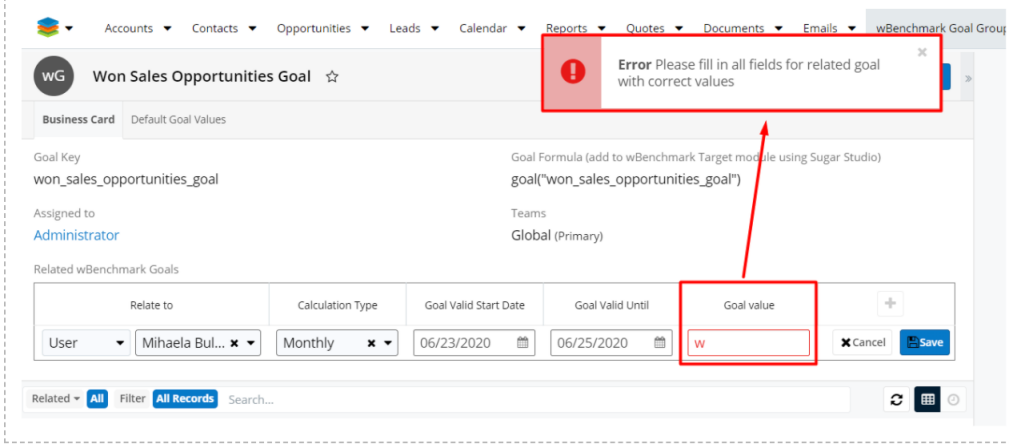

**Goal Valid Until** and **Goal Valid Start Date** are date pickers:



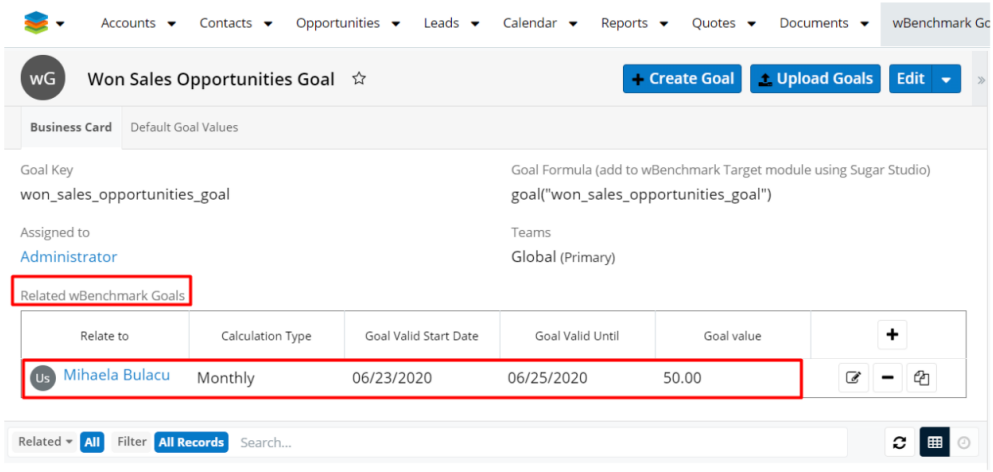

The value of the **Goal Valid Until** field must be a date equal or earlier than the **Goal Valid Start Date** value, otherwise an error will be raised:



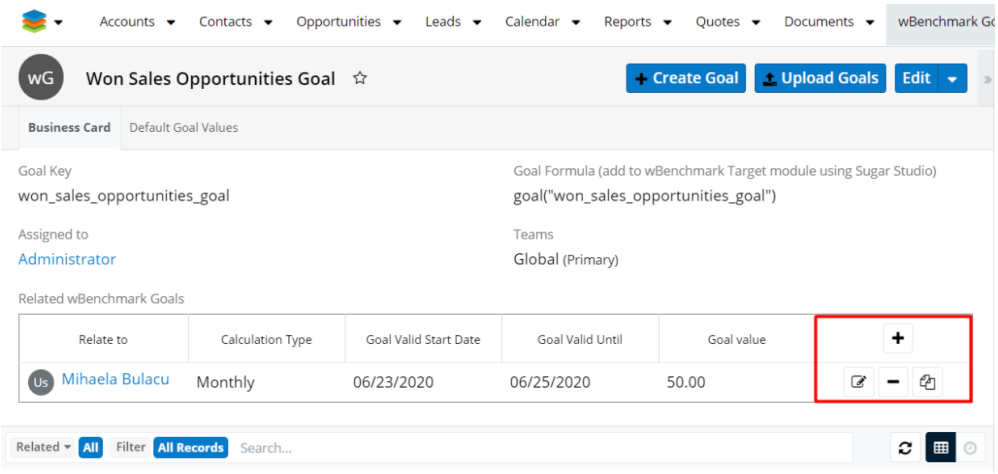

**Goal value** is a numeric field; an error will be raised if its value is not numeric:



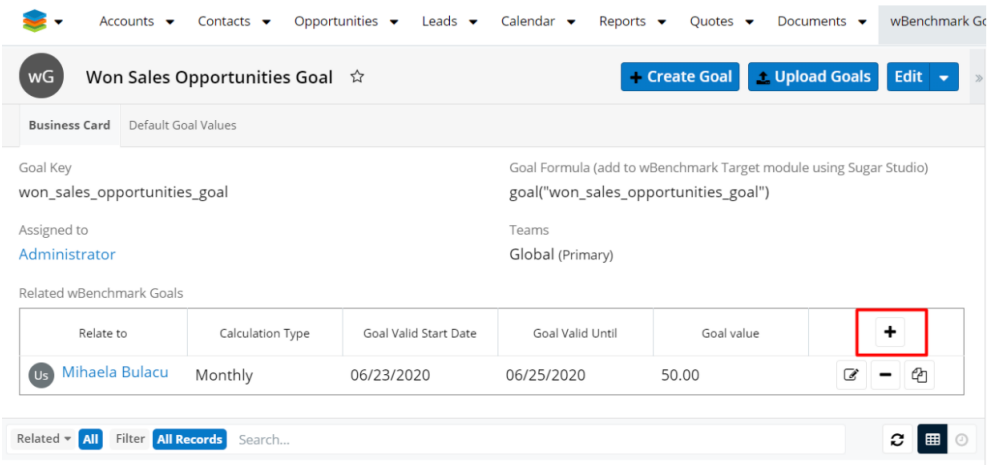
After all fields are filled in, upon clicking the **Save** button, a new **wTargetGoal** record will be created and will be displayed in the **Related wBenchmark Goals** section.



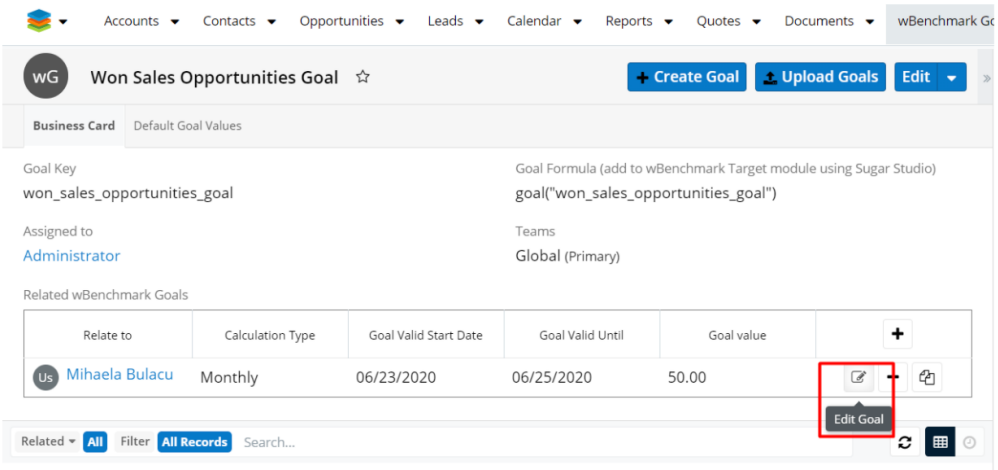

On the **Related wBenchmark Goals** section, the following buttons are available:



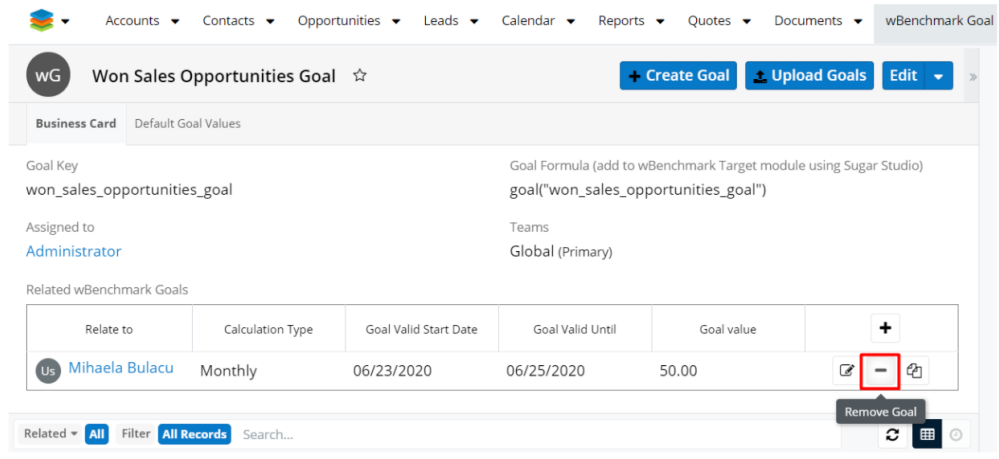

**Create Goal** - pushing this button will add another row of fields necessary to define a new goal.



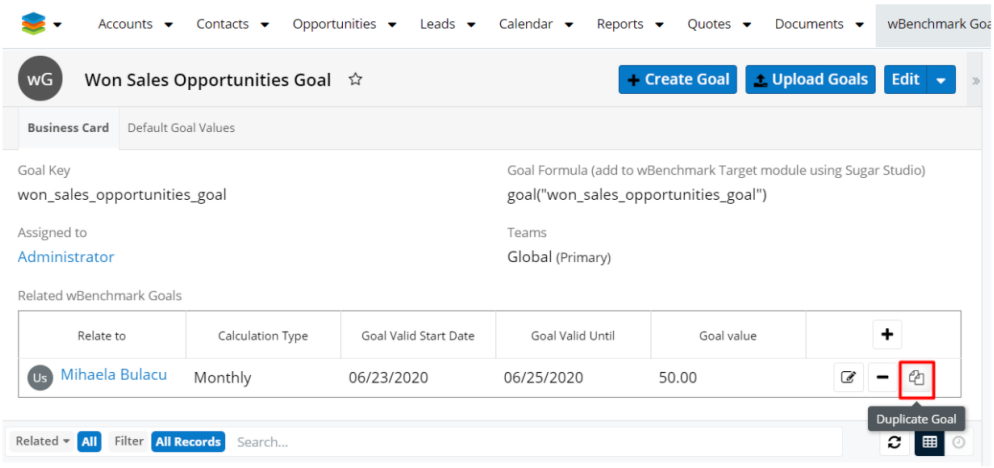

**Edit Goal** - pushing this button will open a goal previously created in Edit mode.




**Remove Goal** - pushing this button will remove the goal from the wTargetGoal module.



**Duplicate Goal** - this option allows the user to create another goal with the same field values.




## Related wBenchmark Goals Visibility

When a Related wBenchmark Goal record is created, the **Assigned To** field is by default populated with the **System Administrator.**

If the **Related To is a user**, the teams of the Related wBenchmark Goal record will be:

- User private team
- If the user reports to another user then the private team of that user will be added
- Teams from goal group except for Global team
- Administrator team

If the **Related To is a team**, the teams of the Related wBenchmark Goal record will be:

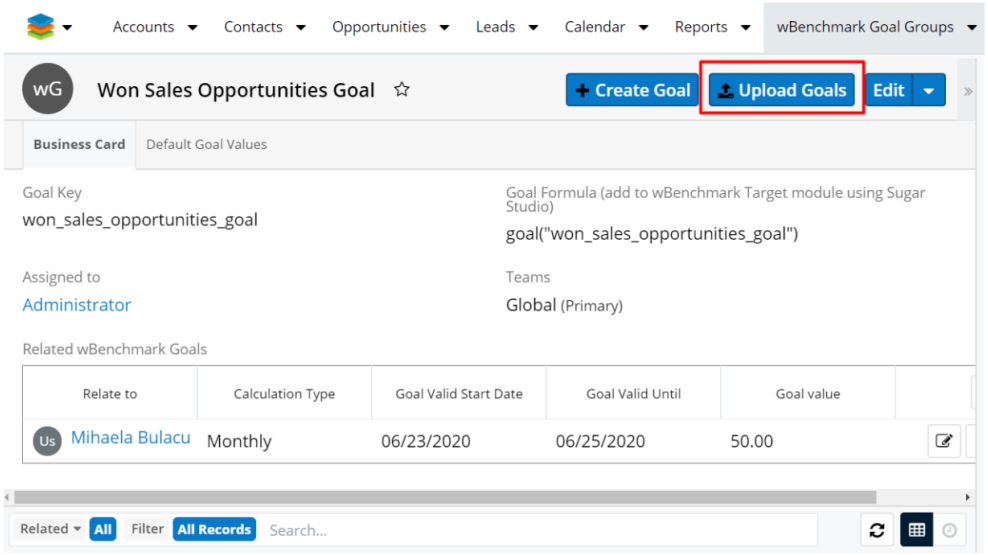
- Teams from goal group except for Global team
- Related To team
- Administrator team

Due to the above, user and team assignment, the Goals visibility is as follows:

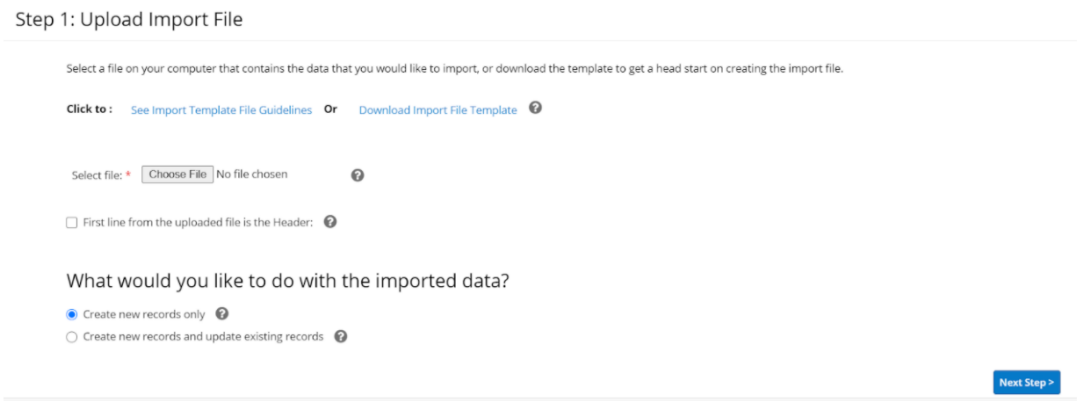
- An admin user will see all Goals from the system
- A regular user will see:
- Their Goals
- Goals of users that report to him
- Goals of teams he is a member of
- Goals of other users from the same team that he is a member of, only if that team was added on the wBenchmark Goal Group record

## Uploading Goals

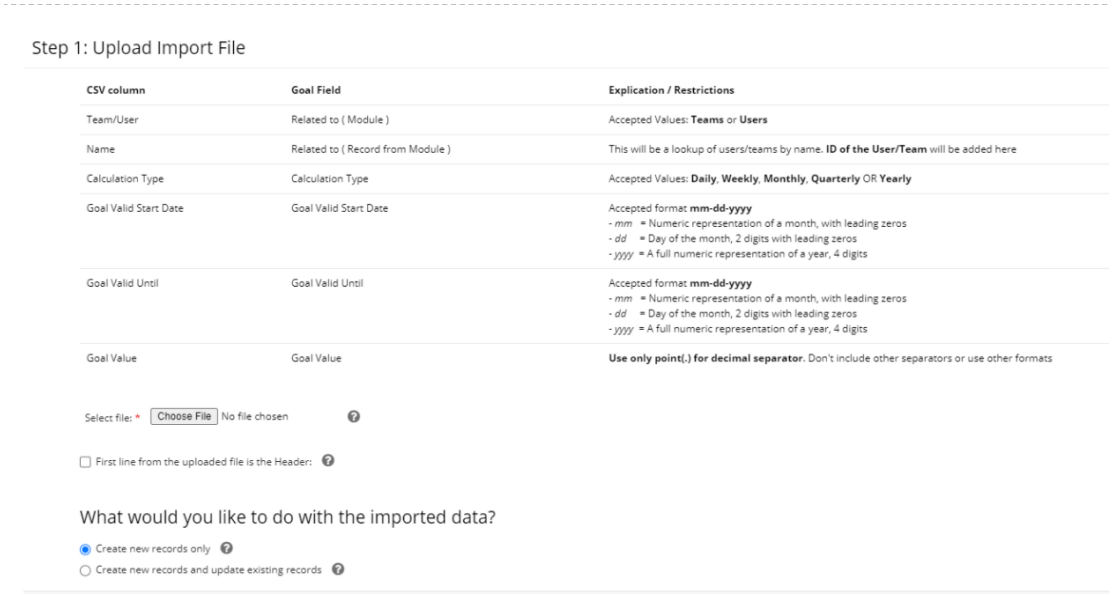
On the header of wBenchmark Goal Group record view the button "**Upload Goals**" is available for admin users and regular users that have the role "**Market Admin**" or "**Market Admin - Goals**".



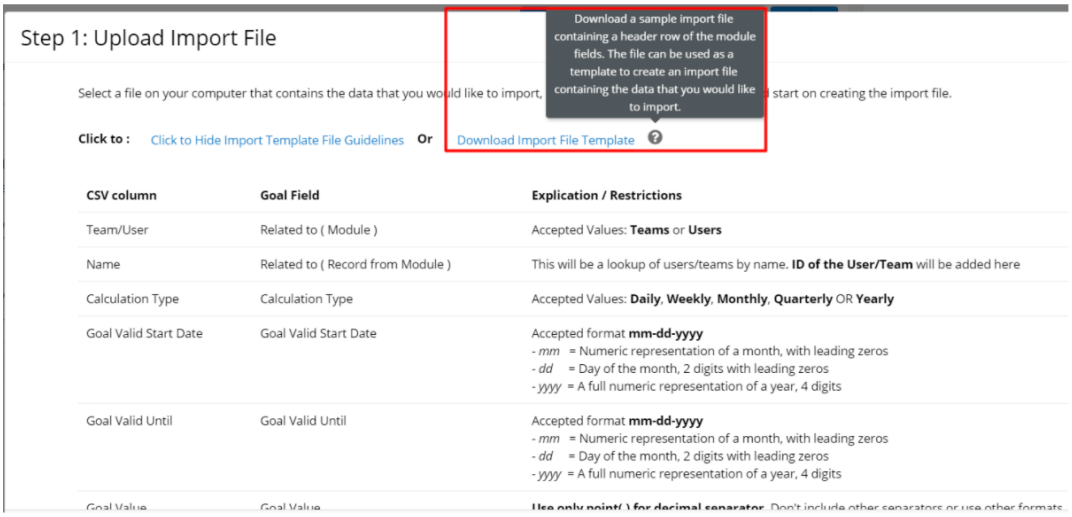

The button opens a page where the user can upload a **CSV** file containing Goals for users and teams. Each row in the CSV will be used to create a new Goal record. The goal record that is created will be related to the wBenchmark Goal Group record where the Upload Goal button is clicked.




By clicking on the **Click to See Import Template File Guidelines** hyperlink, details about the fields imported in the csv file will be displayed.




Users can download a template of the **CSV** by clicking on the **Download Import File Template** hyperlink.




The header of the CSV file that will be imported is:

**"Team/User","Name","Calculation Type","Goal Valid Start Date","Goal Valid Until","Goal Value"**

The CSV columns are set up as below:

- **Team/User**: the values accepted are Teams or Users
- **Name**: here will add the ID of the User/Team
- **Calculation Type**: the values accepted are Daily, Weekly, Monthly, Quarterly OR Yearly
- **Goal Valid Start Date**: accepted format mm-dd-yyyy

mm = Numeric representation of a month, with leading zeros

dd = Day of the month, 2 digits with leading zeros

yyyy = A full numeric representation of a year, 4 digits

- **Goal Valid Until**: accepted format mm-dd-yyyy

mm = Numeric representation of a month, with leading zeros

dd = Day of the month, 2 digits with leading zeros

yyyy = A full numeric representation of a year, 4 digits

- **Goal Value:** a numeric value is accepted here and point(.) as decimal separator

The **First line from the uploaded file is the Header** option needs to be checked if the CSV file contains the header:

**"Team/User","Name","Calculation Type","Goal Valid Start Date","Goal Valid Until","Goal Value"**

What would you like to do with the imported data?

**Create new records only**: if this is selected new records will be created

**Create new records and update existing records**: if this option is selected, the existing record will be updated. The Goal Value will be updated on existing records if a match will be found based on the following fields: Related To, Calculation Type, Goal Valid Start Date, Goal Valid Until

If the **Related Tovalue is a user**, the teams of the created record will be:

- User private team
- If the user reports to another user then the private team of that user will be added
- Teams from goal group except for global team
- Administrator team

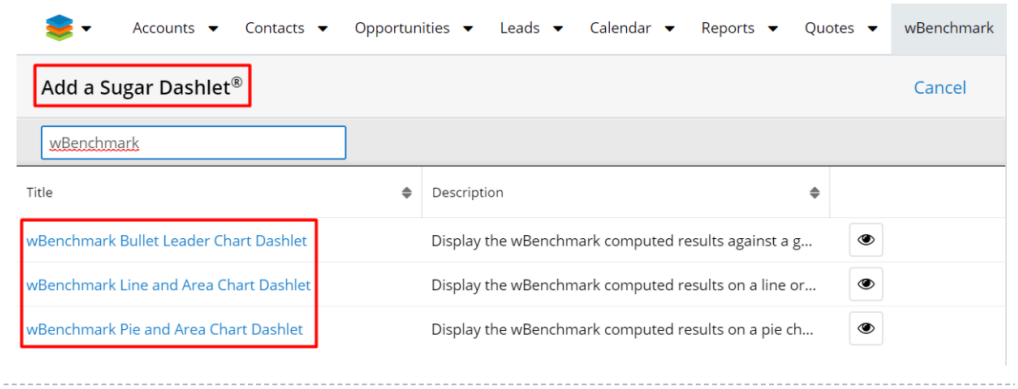
If the **Related To is a team**, the teams of the created record will be:

- Teams from goal group except for global team
- Related To team
- Administrator team

## wBenchmark Dashlets

The **wBenchmark package** provides 3 dashlets:

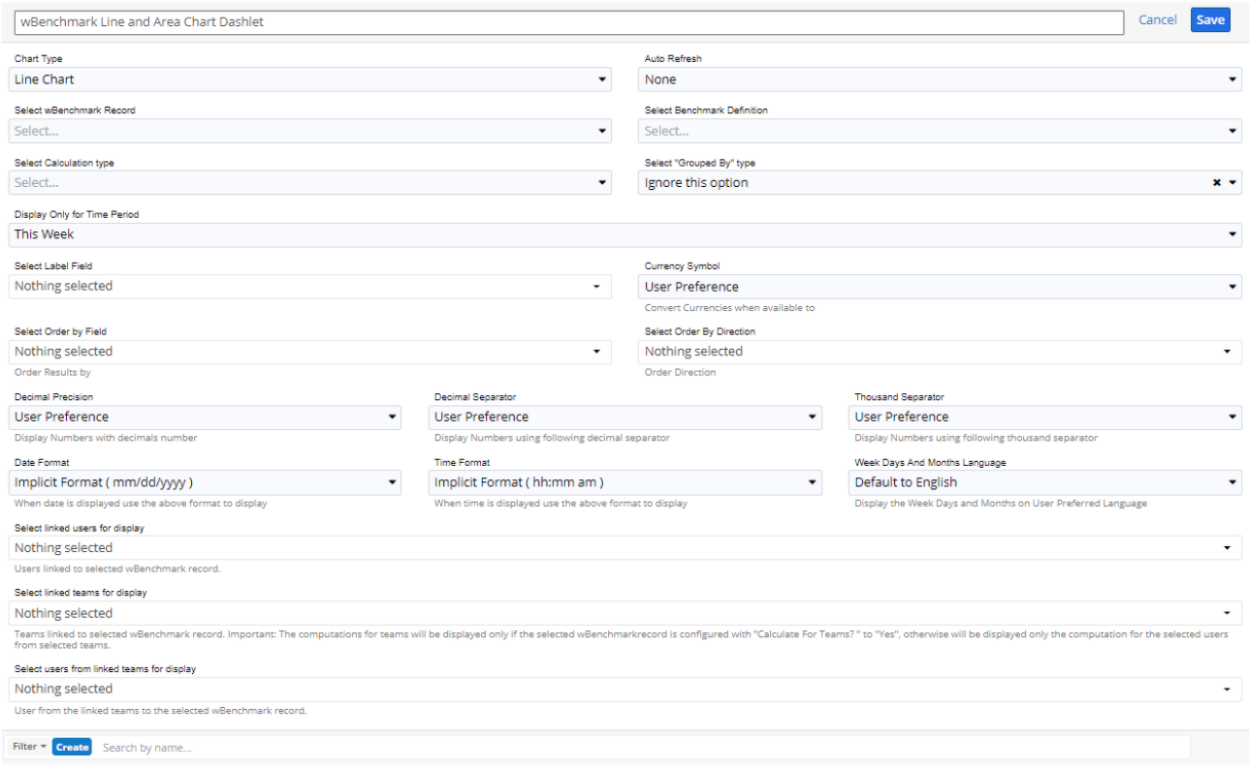
- wBenchmark Line and Area Chart Dashlet
- wBenchmark Bullet Leader Chart Dashlet
- wBenchmark Pie and Area Chart Dashlet




The new dashlets will be available on both the **Home** dashboard and **Intelligence Pane** of all modules' **List Views** and **Record Views**.

### wBenchmark Line and Area Chart Dashlet

The dashlet displays the computed results of the wBenchmark record on a chart.

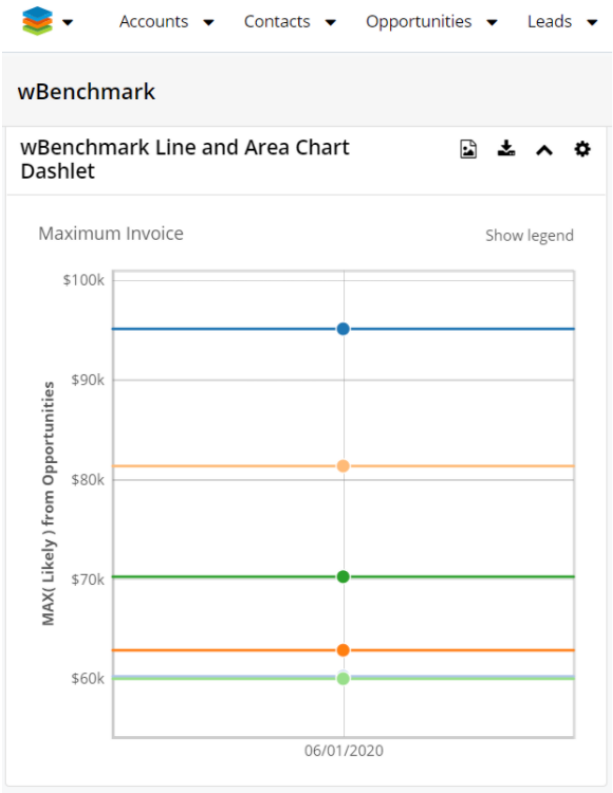


The wBenchmark Line and Area Chart Dashlet configuration drawer contains:

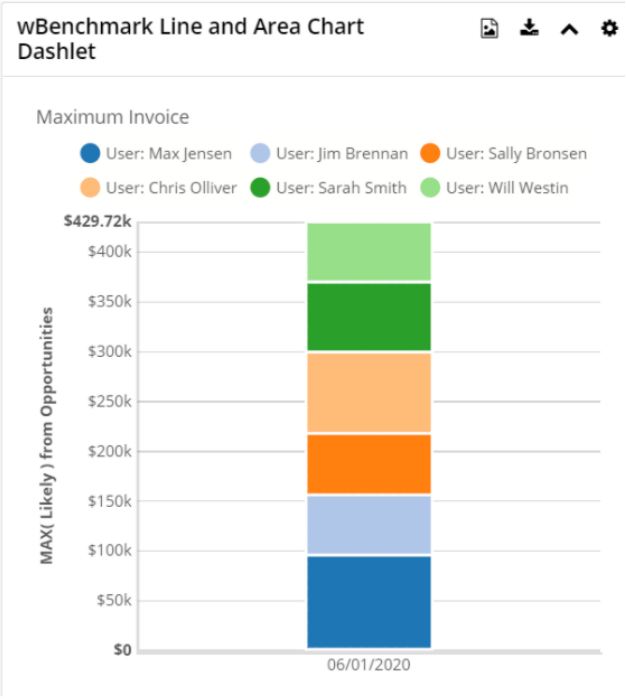
**Name** - this field is set by default to **wBenchmark Line and Area Chart Dashlet** and can be changed by the user. The Name field should not be empty.

**Chart Type** - The chart type options are:

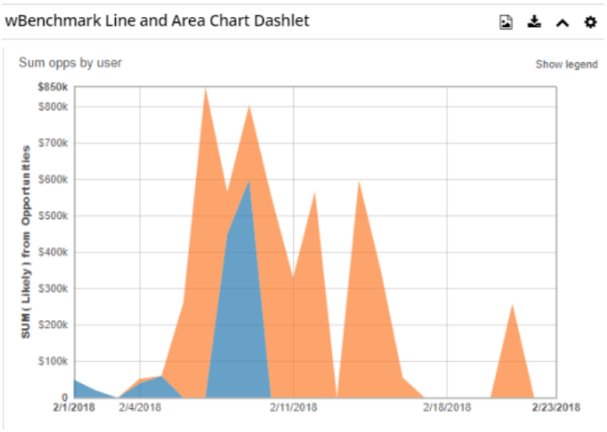
- Line Chart



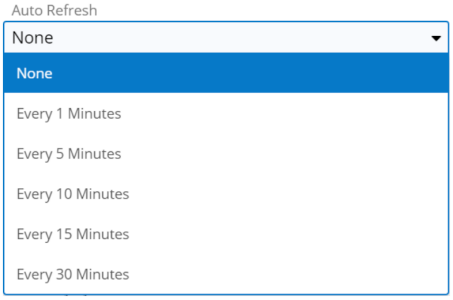

- Vertical Stacked Bar




- Stacked Area




**Auto Refresh** - this option will automatically refresh the dashlet.




**Select wBenchmark Record** - Is a dropdown with all wBenchmark records. The field is required and needs to be selected first for the next fields to be populated.

**Select Benchmark Definition** - Is a required dropdown field that contains the definitions from the selected wBenchmark record.

**Select Calculation Type** - Is a required dropdown field that contains the calculations types (Daily, Weekly, Monthly, Quarterly, Yearly) marked with "Yes" on the selected wBenchmark record.

**Select "Grouped By" type** - This field could have four options: User, Module Field, Users & Module Field, and Ignore this option. See that only the selected benchmark grouped by type is available.

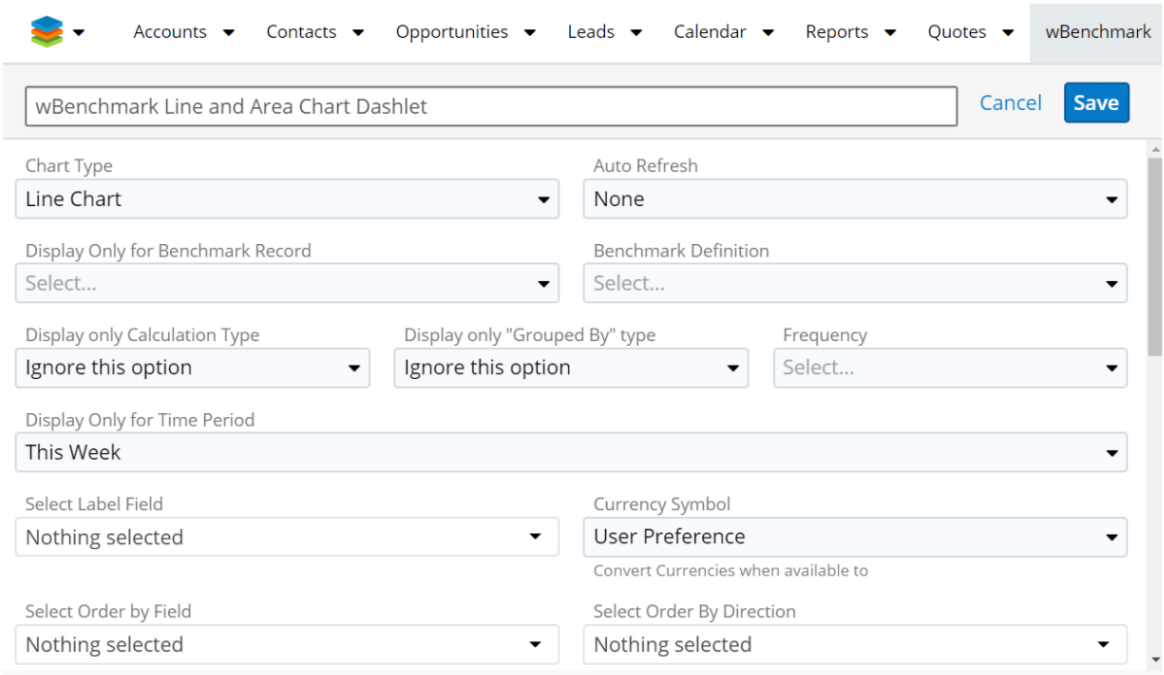
**Display Only for Time Period** - Is a dropdown list that will define the period displayed on the chart. The options are: This Week, Last Week, This Month, Last Month, This Quarter, Last Quarter, This Year, Last Year, All Times, Custom Date Range

**Select Label Field** - This field defines the label. The value of this field will almost always be the **Relate To** (parent_name) field.

**Currency Symbol** - This field displays all system currency values and Convert Currencies when available

**Select Order by Field** - Order results by the selected field

**Select Order By Direction** - This field have two options available: Ascending and Descending



**Decimal Precision** - Display Numbers with decimals number

**Decimal Separator** - Display Numbers using following decimal separator

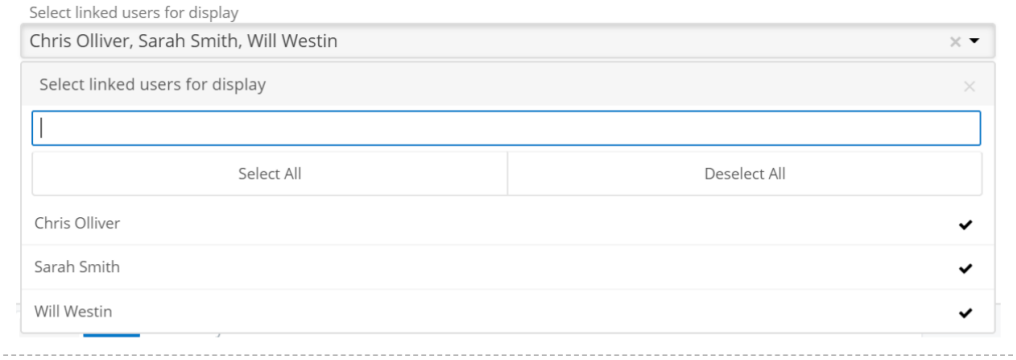
**Thousand Separator** - Display Numbers using following thousand separator

**Date Format** - When date is displayed use this format to display

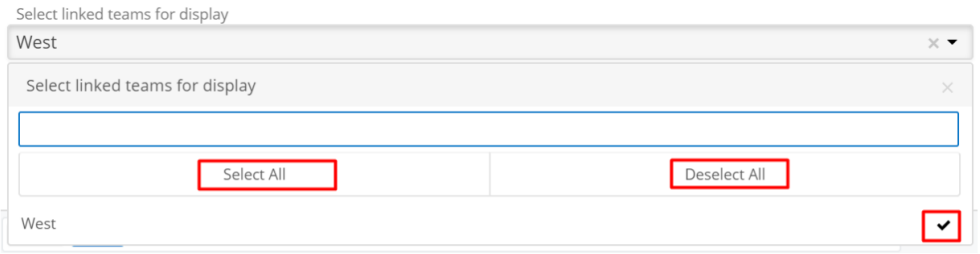
**Time Format** - When time is displayed use this format to display

**Week Days And Months Language** - Display the Week Days and Months on User Preferred Language

**Select linked users for display** - This is a multi-select box with **Select All** and **Search** feature that contains the **Users** linked to the selected wBenchmark record. The users displayed can be selected/deselected all by using the buttons "**Select All** " and "**Deselect All**"; users can also be selected/deselected one by one.

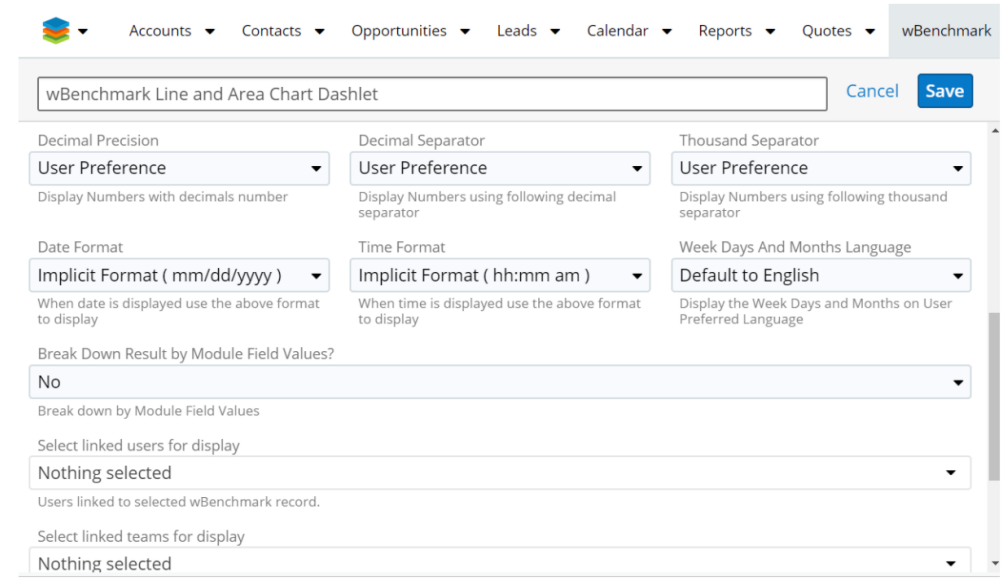



**Select linked teams for display** - this is a multi-select box with both a **Select All** and **Search** feature that contains the **Teams** linked to the selected wBenchmark record. The teams displayed can be selected/deselected all by using the buttons "**Select All**" and "**Deselect All** ; teams can also be selected/deselected one by one.

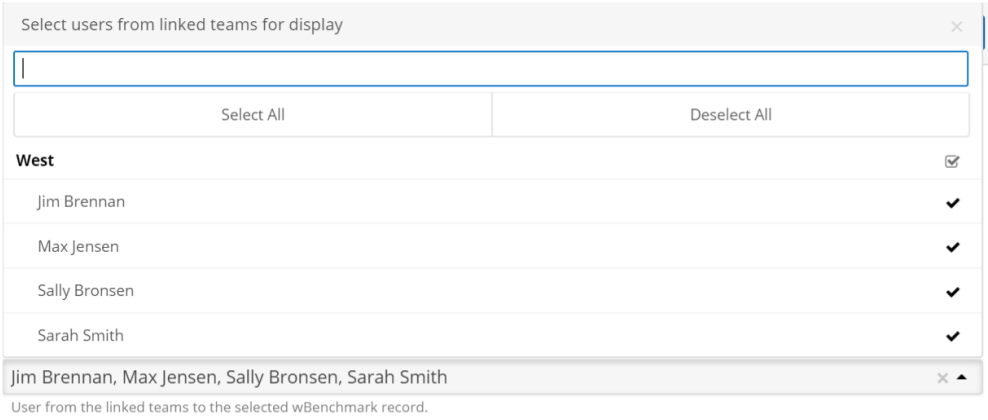



**Select users from linked teams for display** - Is a multi-select box with Select All and Search feature that contains the members of all teams linked to the

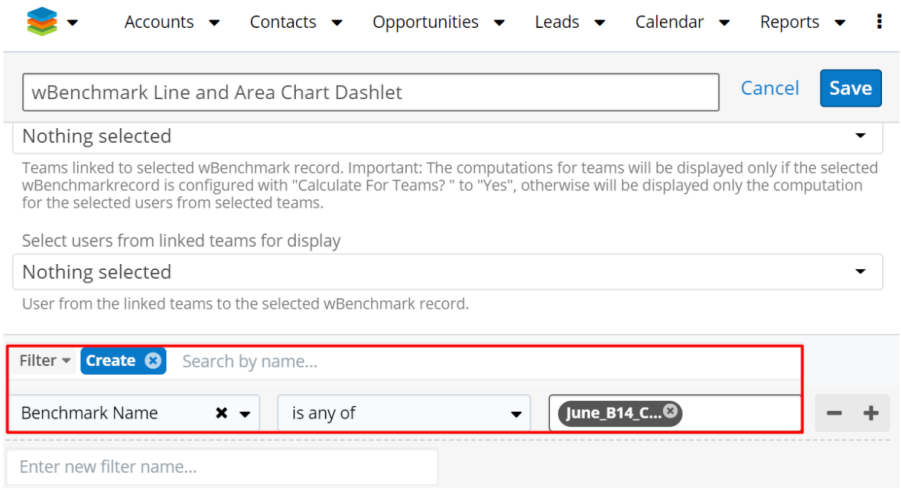
wBenchmark record. The users displayed can be selected/ deselected all by using the buttons "**Select All**" and "**Deselect All**" or can be selected/deselected one by one.




The available users are grouped by team; all members of a team can be selected if the checkbox corresponding to that team is checked.



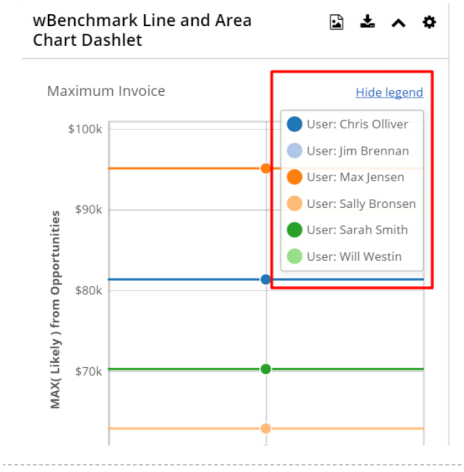

**Filter** - a filter can be created for wBenchmarkTarget Module records that will be displayed on the chart. This section is populated with the corresponding filters of the target module only after a wBenchmark record is selected on the dashlet.



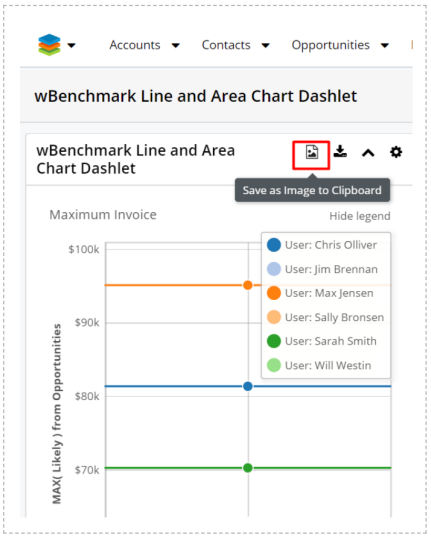

**Save** - Saves the configurations made for the dashlet

**Cancel** - The configurations made for the dashlet are canceled

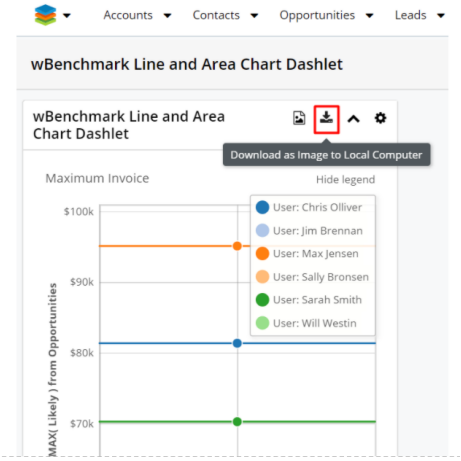
**Legend** - Users and teams that are represented on the chart can be selected/deselected from the Legend option from the upper right corner of the dashlet.



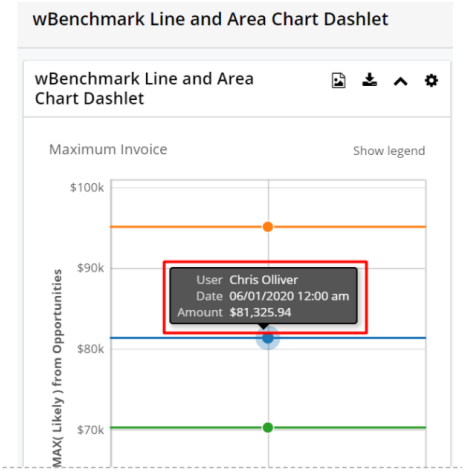

**Save as Image to Clipboard** - This button is displayed on the dashlet header. When this button is clicked a popup will appear on the screen with the image of the chart generated. The users can download the image via right click and "**Save image as...**" or they can click on the image in order to copy it on clipboard:



**Save as Image to Local Computer at Full HD Resolution** - This button will download the chart as a PNG image.

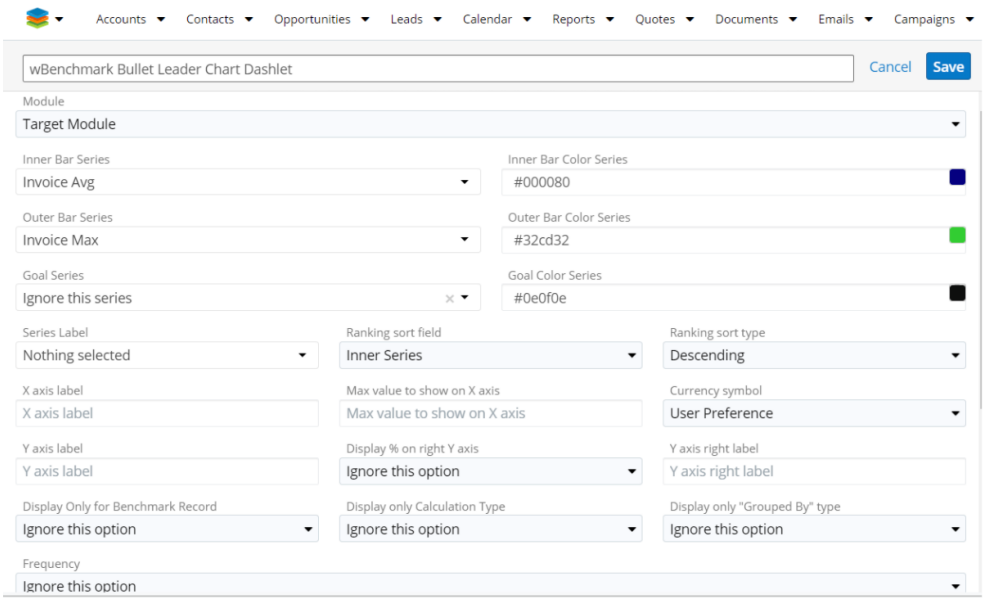



The available tooltips will display the details on all types of chart.



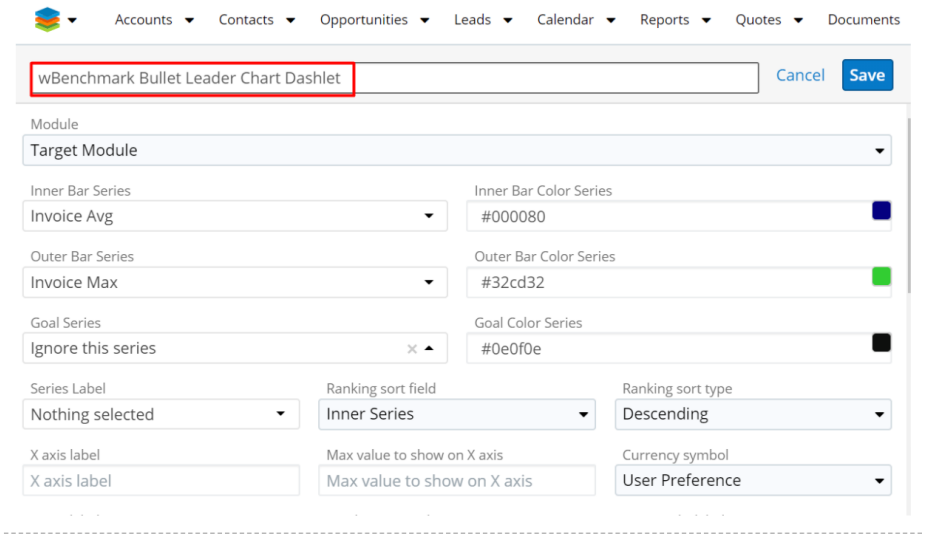

## wBenchmark Leader Bullet Chart

The **wBenchmark Leader Bullet Chart Dashlet** is a dashlet that displays the computed results against a goal.

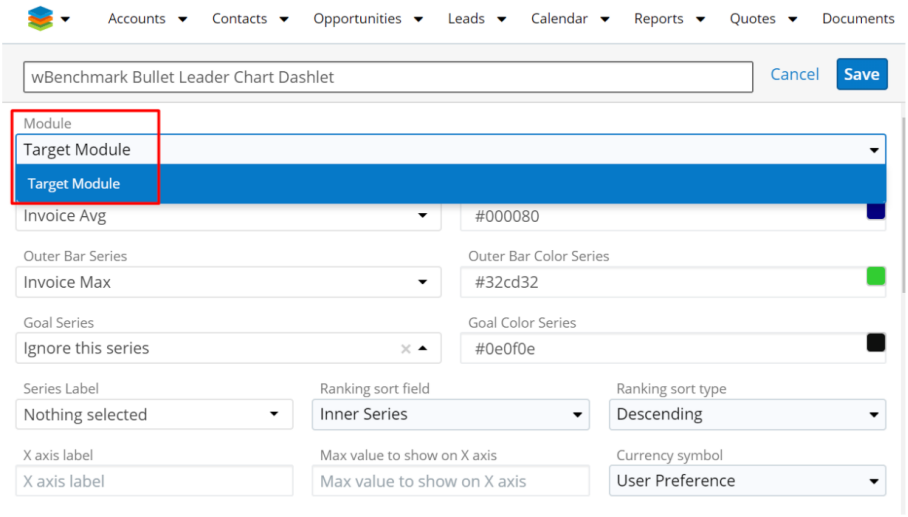



The configuration drawer for wBenchmark Line Chart Dashlet contains the following fields:

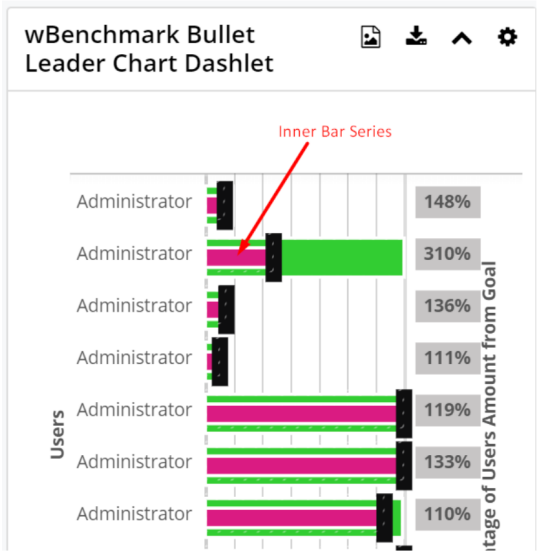
**Name** - By default is "**wBenchmark Bullet Leader Chart Dashlet**" and can be changed by the user. This field should always be populated.



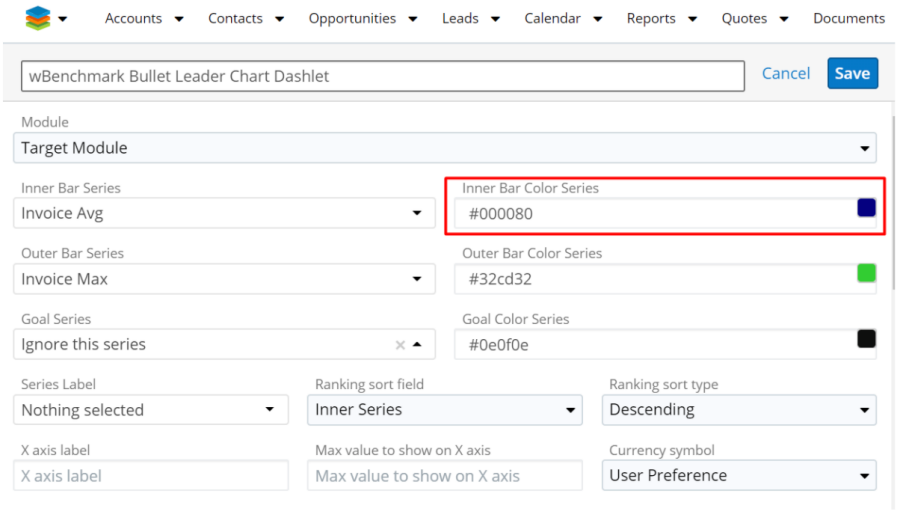

**Module** - Is a dropdown with all modules of type wBenchmarkTarget that have wBenchmark records created for them. This field needs to be selected first in order to be able to select the series fields.



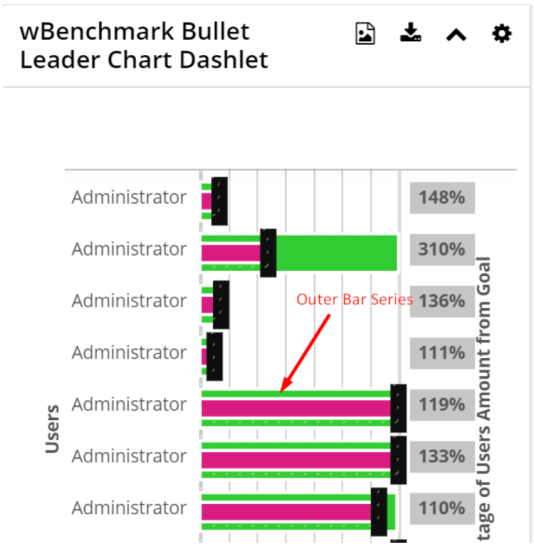

**Inner Bar Series** - is a dropdown with all types of fields from the selected wBenchmarkTarget module. This field is required and its value will be displayed on the chart on top of the Outer Bar Series if that is selected.



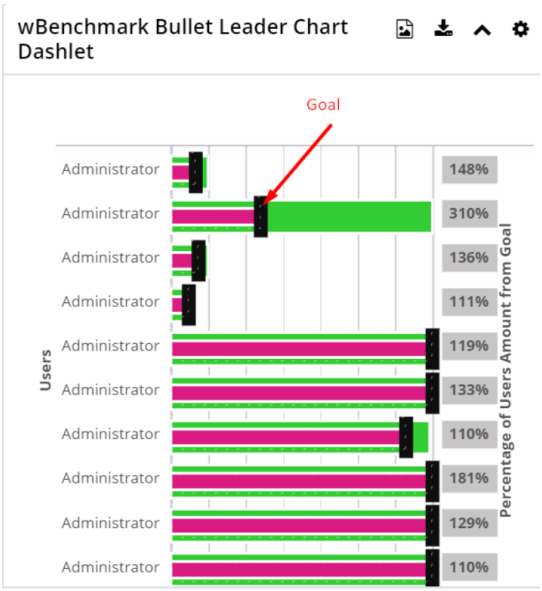

**Inner Bar Color Series** - is a color picker with the default value #000080 (blue) and represents the color displayed for each of the Inner Bar Series.




**Outer Bar Series** - is a dropdown with all numeric fields (integer, decimal, float, currency) from the selected wBenchmarkTarget module. Its value will be displayed on the chart under Inner Bar Series. This field has the option "Ignore this series".

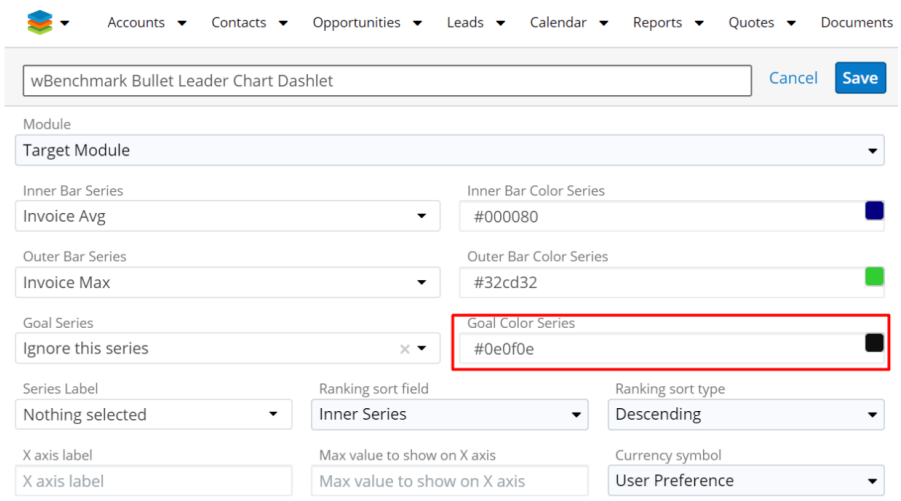



**Goal Series** - is a dropdown with all fields from the selected wBenchmarkTarget module. The value of this field represents the value used as the Goal amount and is represented by a vertical line. This field has the option "Ignore this series".




Usually, this field is a calculated field using a formula generated by a wBenchmark Goal Groups record. The creation of the Goal formula will be detailed in the next chapters.

**Goal Color Series** - is a color picker with the default value #0e0f0e (black) and represents the color displayed for each of the Goal Series.

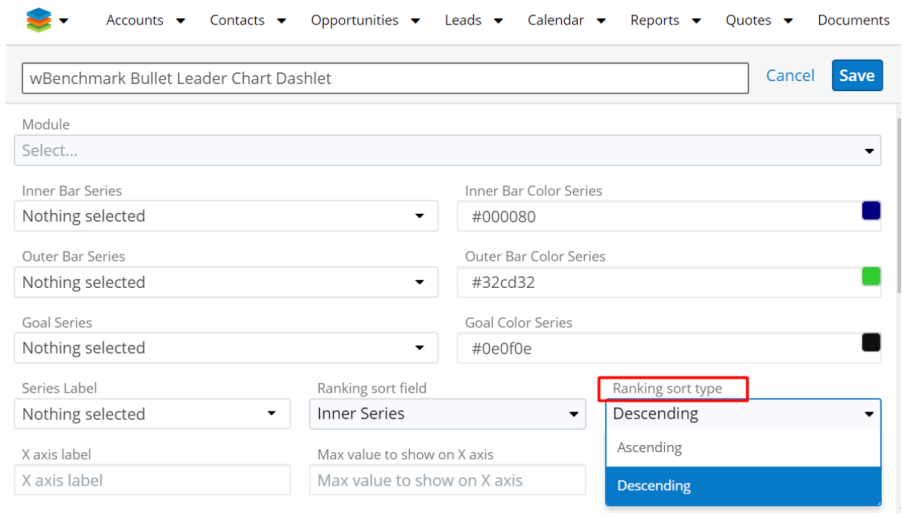



**Series Label** - is a dropdown with all fields from the selected wBenchmarkTarget module and represents what is to be used as a Y–axis value. The value of this field will almost always be the **Relate To** (parent_name) field.

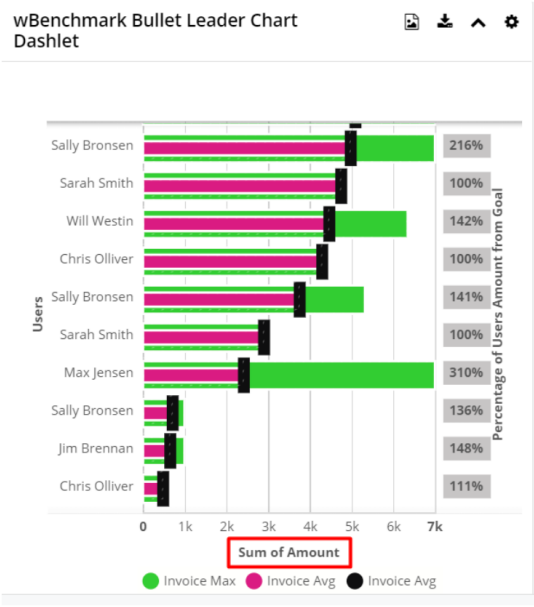
**Ranking Sort Field** - this field represents which series field is to be used as a Y–axis value. This is a dropdown list with the following values:

- 'Inner Series' – the resulting value of the Inner Bar Series
- 'Outer Series'– the resulting value of the Outer Bar Series
- 'Series Label' – the resulting value of the Series Label

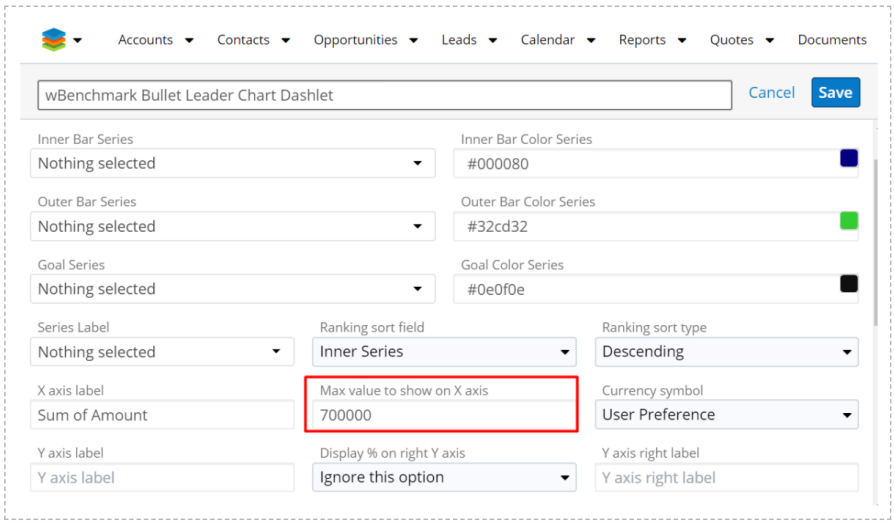
**Ranking sort type** - is a dropdown field and represents the sorting type for the chosen field in the Ranking Sort Field. The default value is set to 'Descending'.

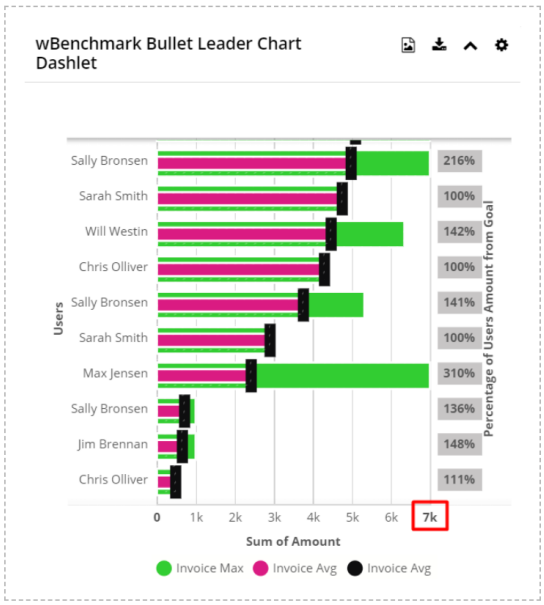



**X axis label** - what text should be displayed under the X–axis values.



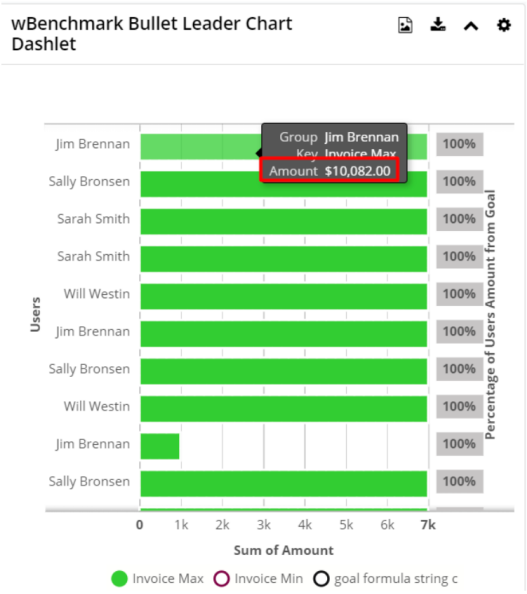

**Max value to show on X axis** - a number value to use as the farthest right X axis value. Users can use this to determine the white space between the longest bar and the right edge of the chart.



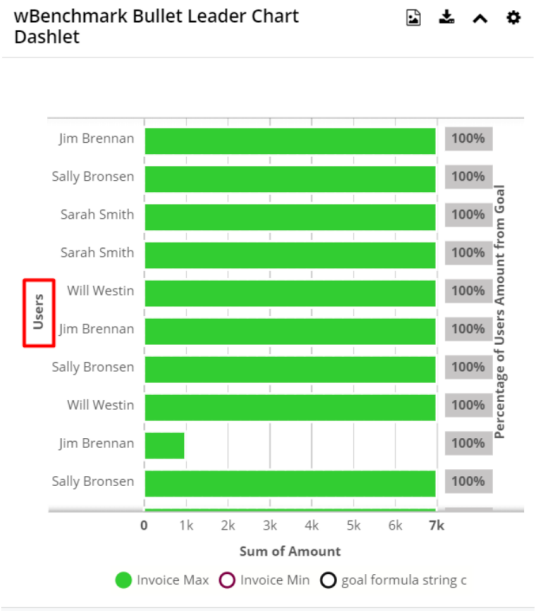




If the User leaves this field blank, the white space needed will be auto calculated.

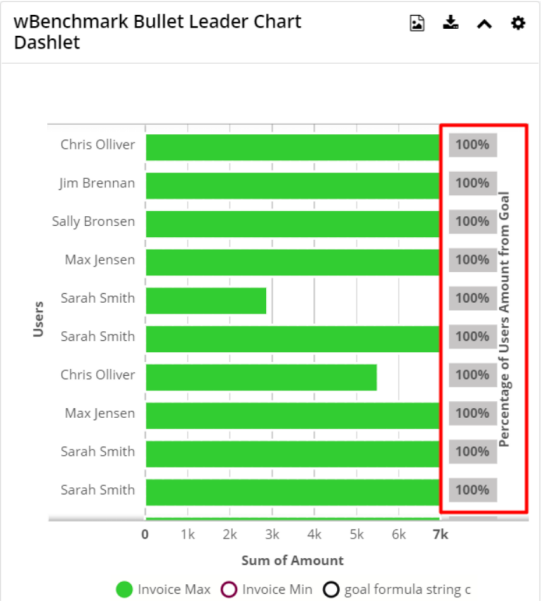
**Display currency symbol** - option to display the currency symbol on the tooltip that will pop up on the chart.




**Y axis label** - what text should be displayed outside the Y–axis values.




**Display % on right Y axis** - Is a dropdown with the option generated based on the selected series. When this is selected a percentage will be displayed on the right Y axis.




If the following fields are selected on the series fields:

- Inner Bar Series = Sales Amount
- Outer Bar Series = Company Average
- Goal Series = Goal
- The options available on "**Display % on right Y axis**" will be:
- Ignore this option
- Sales Amount / Company Average %
- Sales Amount / Goal %
- Company Average / Sales Amount %
- Company Average / Goal %

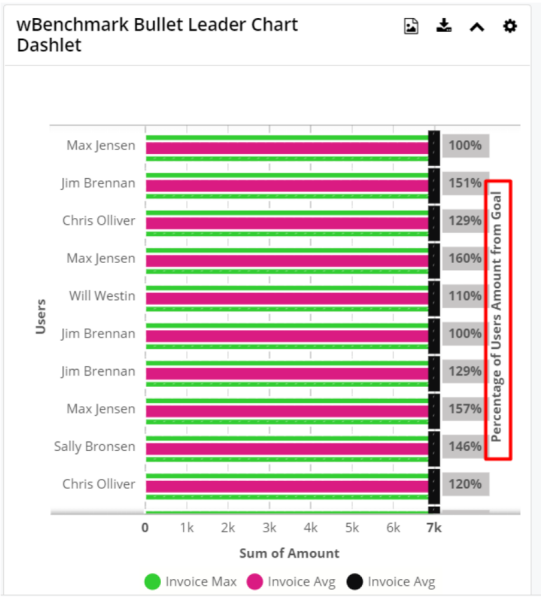
For very big values these are displayed abbreviated:

4 000 000 000 => 4B

2 000 000 => 2M

297 342 => 297K

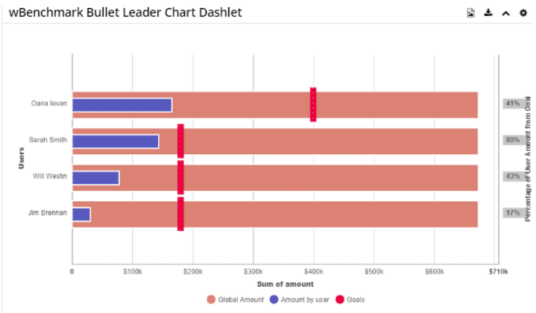
**Y axis right label** - what text should be displayed outside the right Y axis values. The right Y axis is the Percentages values area.



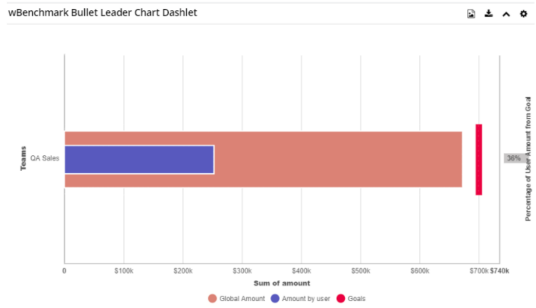

The Y axis right label is not displayed on the chart if the value of the **Display % on the right Y axis** field is set to **Ignore this option**.

**Calculated By** - is a required dropdown field with the following options:

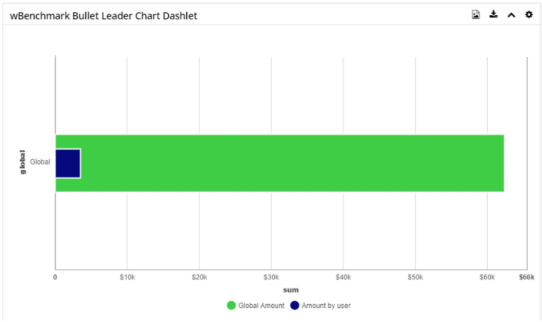
- **Users** - shows on chart the values calculated by users from the selected wBenchmarkTarget module.



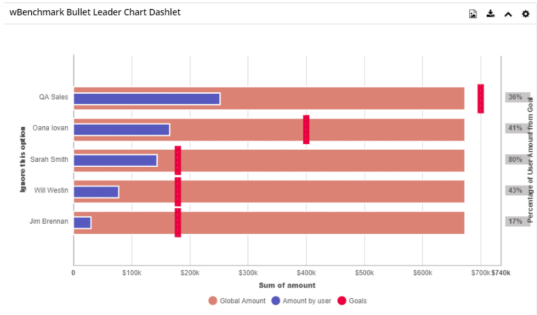

- **Teams** - shows on chart the values calculated by teams from the selected wBenchmarkTarget module.




- **Global** - shows on chart the global values calculated from the selected wBenchmarkTarget module




- **Ignore this option** - shows on chart all the values calculated from the selected wBenchmarkTarget module




**Display only Grouped by computations** - This field could have four options: User, Module Field, Users & Module Field, and Ignore this option. See that only the selected benchmark grouped by type is available.

**Decimal Precision** - Display Numbers with decimals number

**Decimal Separator** - Display Numbers using following decimal separator

**Thousand Separator** - Display Numbers using following thousand separator

**Date Format** - When date is displayed use this format to display

**Time Format** - When time is displayed use this format to display

**Week Days And Months Language** - Display the Week Days and Months on User Preferred Language

**Frequency**: - is a required dropdown field with the following options:

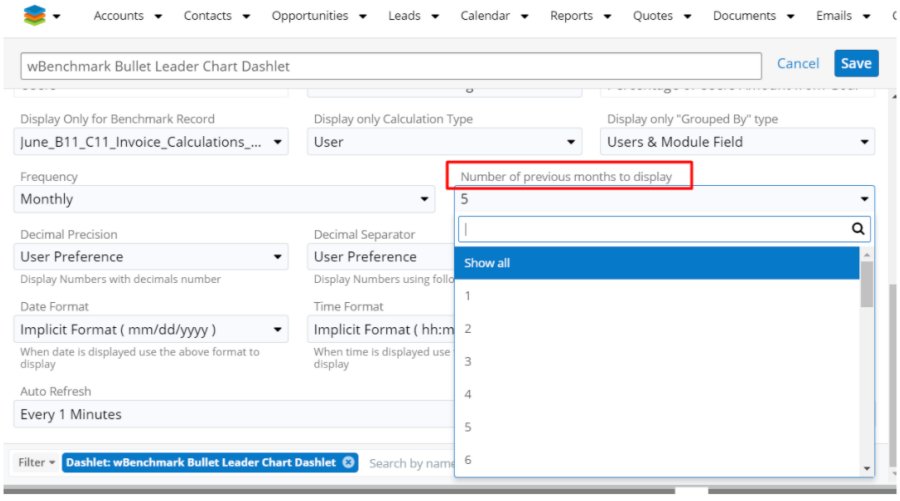
- Daily - shows on chart all the values calculated for days; Frequency is Daily on the records from the selected wBenchmarkTarget module
- Weekly - shows on chart all the values calculated for weeks; Frequency is Weekly on the records from the selected wBenchmarkTarget module
- Monthly - shows on chart all the values calculated for months; Frequency is Monthly on the records from the selected wBenchmarkTarget module
- Quarterly - shows on chart all the values calculated for quarters; Frequency

is Quarterly for the records from the selected wBenchmarkTarget module
- Yearly - shows on chart all the values calculated for years; Frequency is Yearly on the records from the selected wBenchmarkTarget module
- Ignore this option - shows on chart all the values calculated; shows the records from the selected wBenchmarkTarget module with all types of Frequency

Number of previous days/weeks/months/quarters/years to display -> Has a dynamic label which changes based on the Frequency selected:

- If Frequency is **Daily**, then the label is "**Number of previous days to display**"
- If Frequency is **Weekly**, then it will show "**Number of previous weeks to display**"
- If Frequency is **Monthly**, then it will show "**Number of previous months to display**"
- If Frequency is **Quarterly**, then it will show "**Number of previous quarters to display**"
- If Frequency is **Yearly**, then it will show "**Number of previous years to display**"
- If the value of the **Frequency** field is set to "**Ignore this option**", then the field is not displayed.

If the value selected for the **Number of previous days/weeks/months/quarters/years to display** field is set to **Show All**, all records generated for that Frequency will be represented on the chart.



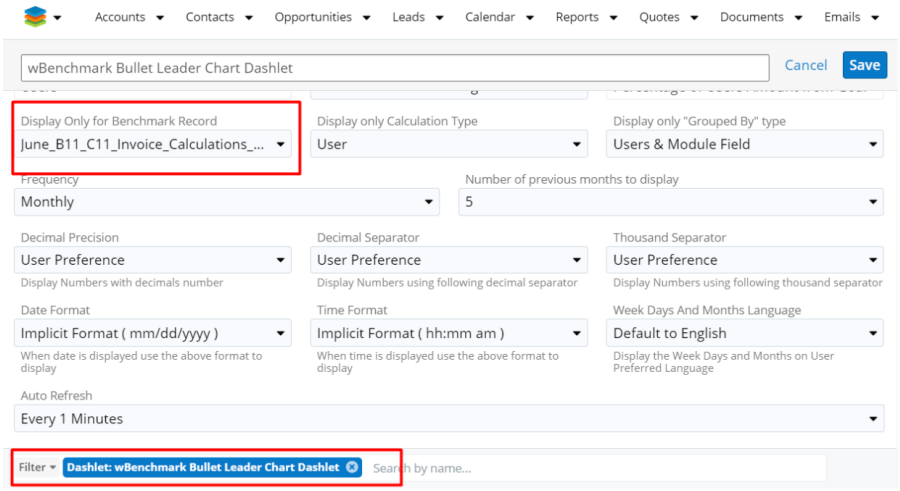

If the value selected for the **Number of previous days/weeks/months/quarters/years to display** field is **1**, then the records generated for the current day/week/month/quarter/year will be represented on the chart.

If the value selected for the **Number of previous days/weeks/months/quarters/years to display field** is **2**, on the chart will be the records generated for the current day / week / month / quarter / year and the records generated for the previous day/week/month/quarter/year.

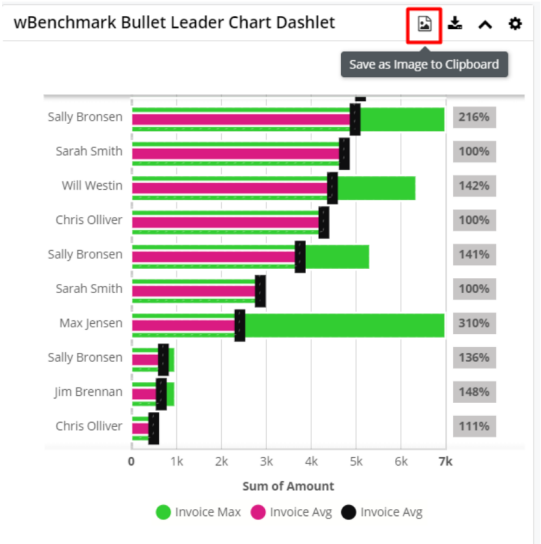
**Display Only for Benchmark Record** - A dropdown with all records from wBenchmark module. This field is used to filter the records by a wBenchmark record in case the Module selected holds the computed Benchmarks for multiple wBenchmark records.

**Auto Refresh** - used to determine the refresh rate of the chart.

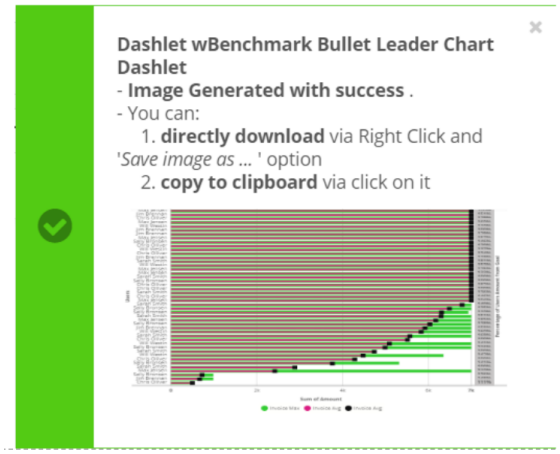
**Filter** - a filter can be created for wBenchmarkTarget Module records that will be displayed on the chart. This section is populated with the corresponding filters of the target module only after a Module is selected on the dashlet.



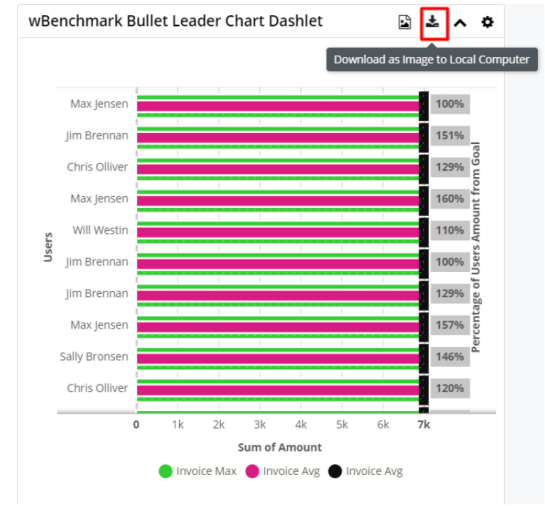

**Save as Image to Clipboard** - This button is displayed on the dashlet header



When this button is clicked, a popup will appear on the screen with the image of the chart generated. The users can download the image via right click and "***Save image as...***" or they can click on the image in order to copy it on clipboard:

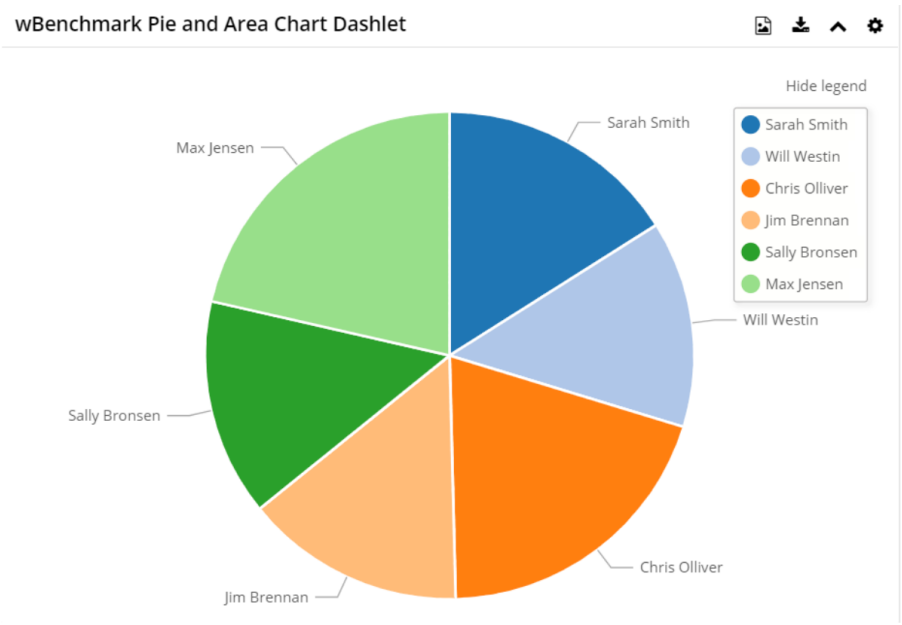



**Download as Image to Local Computer** - This button displayed on the dashlet header will download the chart as a PNG image.

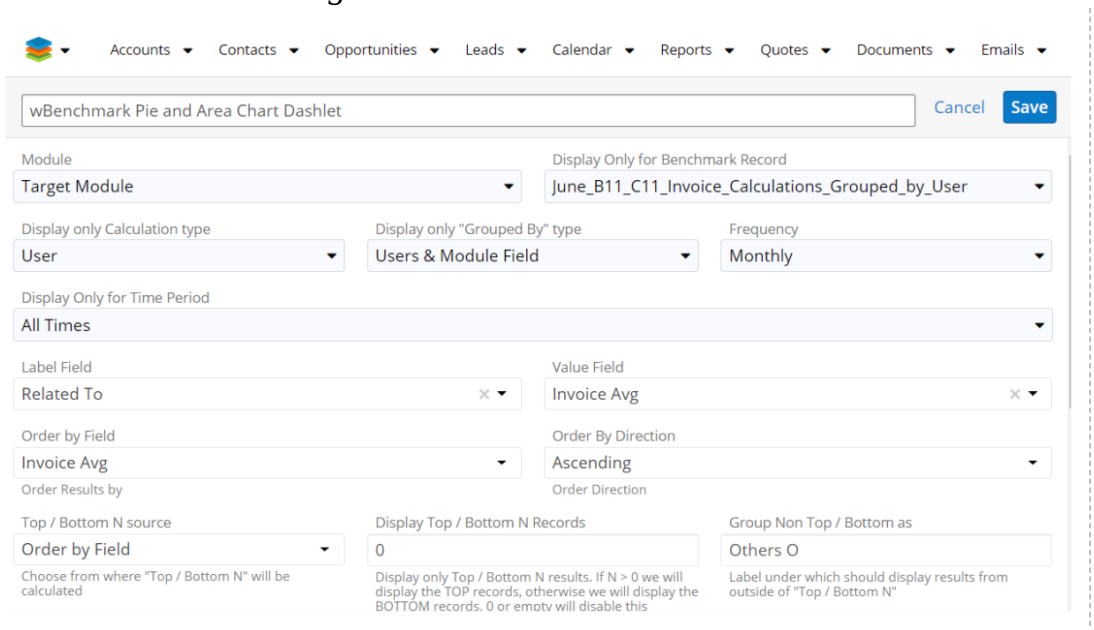



## wBenchmark Pie and Area Chart

The dashlet displays the computed results of the wBenchmark record on a chart.

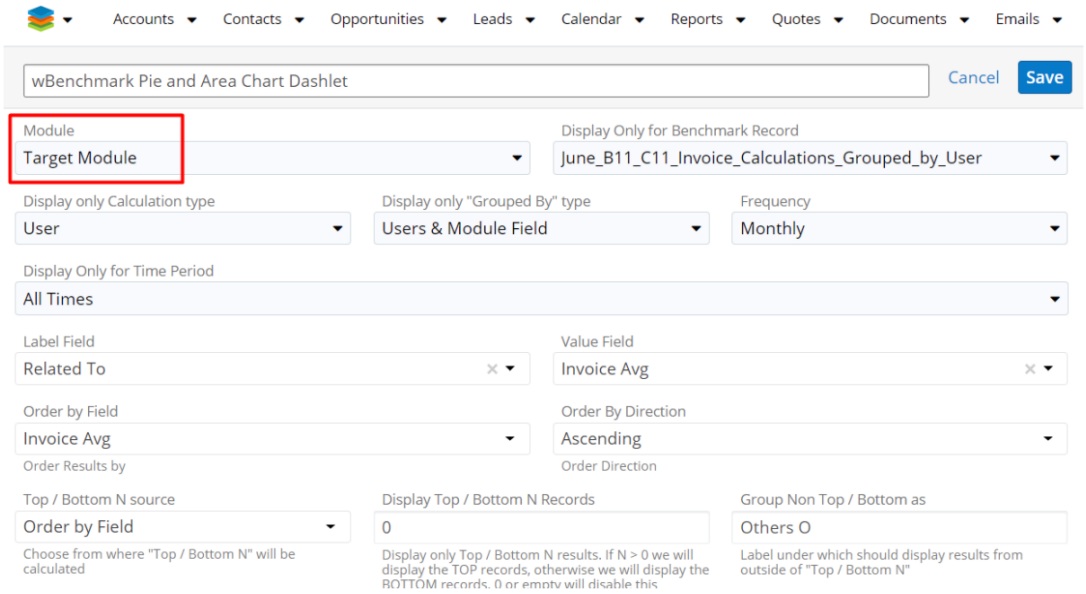



The configuration drawer for **wBenchmark Pie and Area Chart Dashlet** contains the following fields:

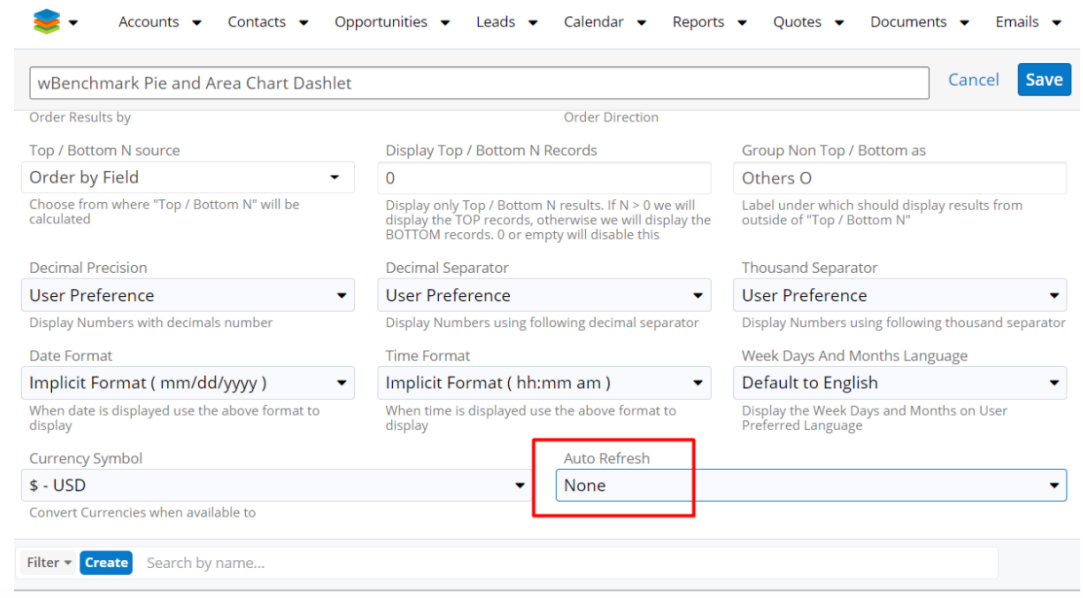



**Name** - is by default "**wBenchmark Line and Area Chart Dashlet**" and can be changed by the user. The Name field should not be empty.

**Module** - this is a dropdown list that displays all the existing Target Modules.




**Auto Refresh** - Option that will automatically refresh the dashlet at the set interval.




**Display Only for wBenchmark Record** - Is a dropdown with all wBenchmark records. The field is not required and if Ignore this Option is selected, then all computed records from the selected Target Module will be displayed on the chart.

**Display only Calculation type** - Is a required dropdown field that contains the calculations types (Daily, Weekly, Monthly, Quarterly, Yearly) marked with "Yes" on the selected wBenchmark record. Ignore this Option is also available, and if this is selected then all types of calculations will be displayed.

**Display only "Grouped By" type** - This field could have four options: User, Module Field, Users & Module Field, and Ignore this option. See that only the selected benchmark grouped by type is available.

**Display Only for Time Period** - Is a dropdown list that will define the period displayed on the chart. The options are: This Week, Last Week, This Month, Last Month, This Quarter, Last Quarter, This Year, Last Year, All Times, Custom Date Range

**Label Field** - This field defines the label. This will almost always be the **Relate To** (parent_name) field.

**Value Field** - there are available all fields from the selected Target Module

**Currency Symbol** - This field displays all system currency values and Convert Currencies when available

**Select Order by Field** - Order results by the selected field

**Select Order By Direction** - This field have two options available: Ascending and Descending

**Top/Bottom N source** - this option allows the user to choose from where "Top / Bottom N" will be calculated

**Display Top/Bottom N Records** - Display only Top / Bottom N results. If N > 0 we will display the TOP records, otherwise we will display the BOTTOM records. 0 or empty will disable this

**Group Non Top/Bottom as** - label under which should display results from outside of "Top/Bottom N"

**Decimal Precision** - Display Numbers with decimals number

**Decimal Separator** - Display Numbers using following decimal separator

**Thousand Separator** - Display Numbers using following thousand separator

**Date Format** - When date is displayed use this format to display

**Time Format** - When time is displayed use this format to display

**Week Days And Months Language** - Display the Week Days and Months on User Preferred Language

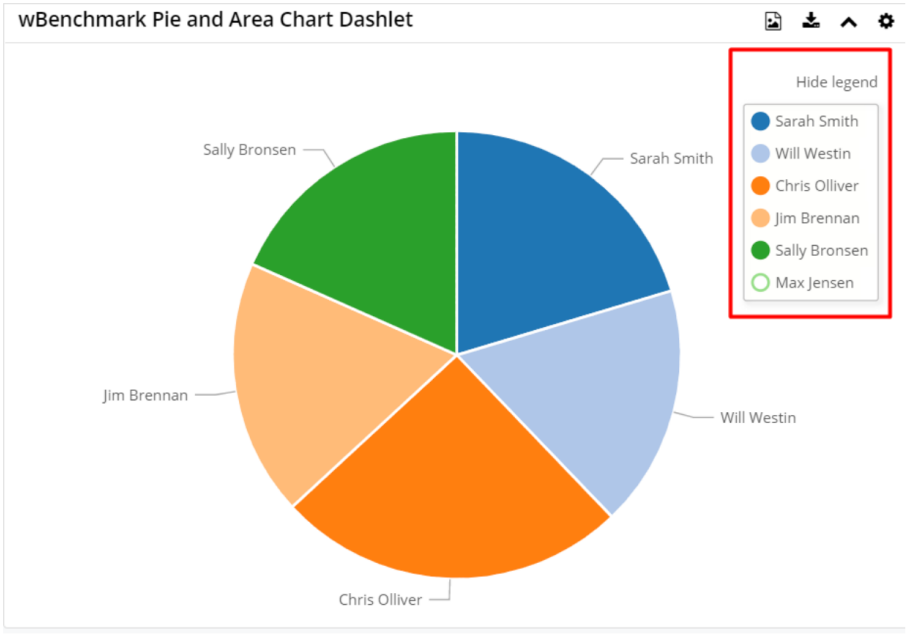
**Filter** - a filter can be created for wBenchmarkTarget Module records that will be

displayed on the chart. This section is populated with the corresponding filters of the target module only after a Target Module is selected on the dashlet.

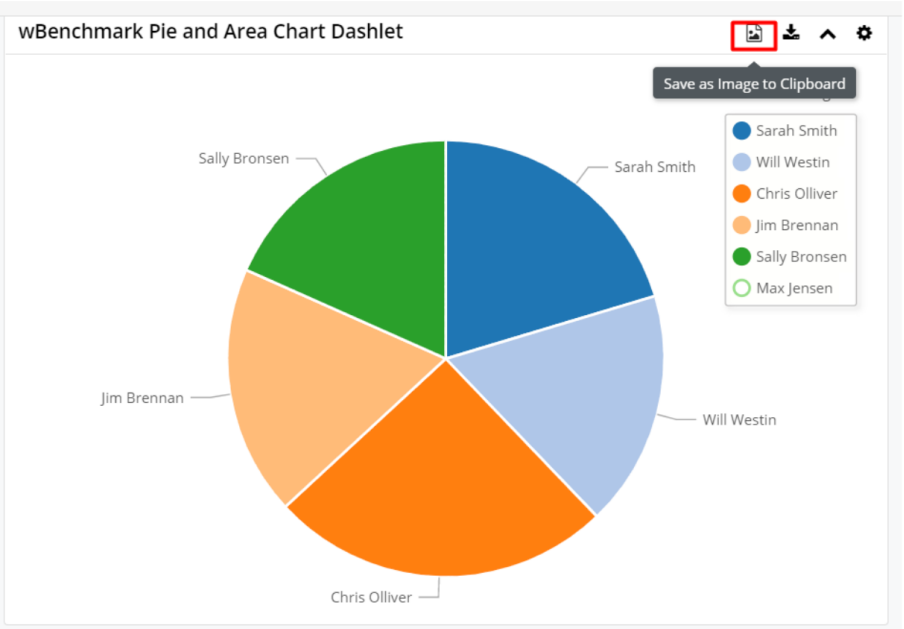
**Save** - Saves the configurations made for the dashlet

**Cancel** - The configurations made for the dashlet are canceled

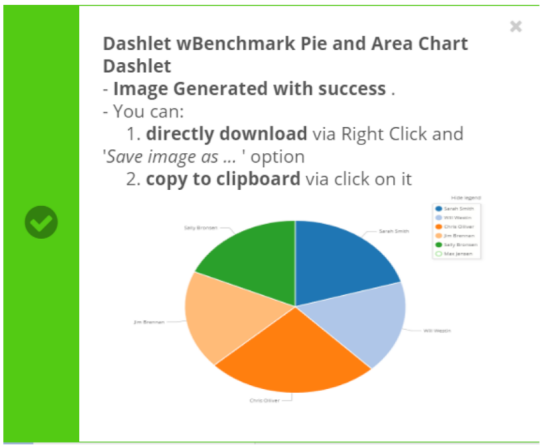
**Legend** - Users and teams that are represented on the chart can be selected/deselected from the Legend option from the upper right corner of the dashlet.



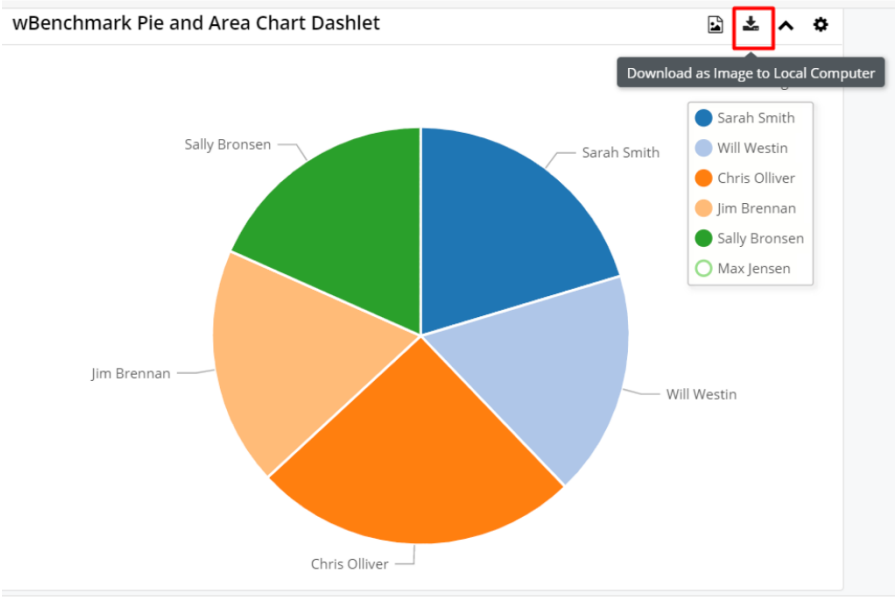

**Save as Image to Clipboard** - This button is displayed on the dashlet header:



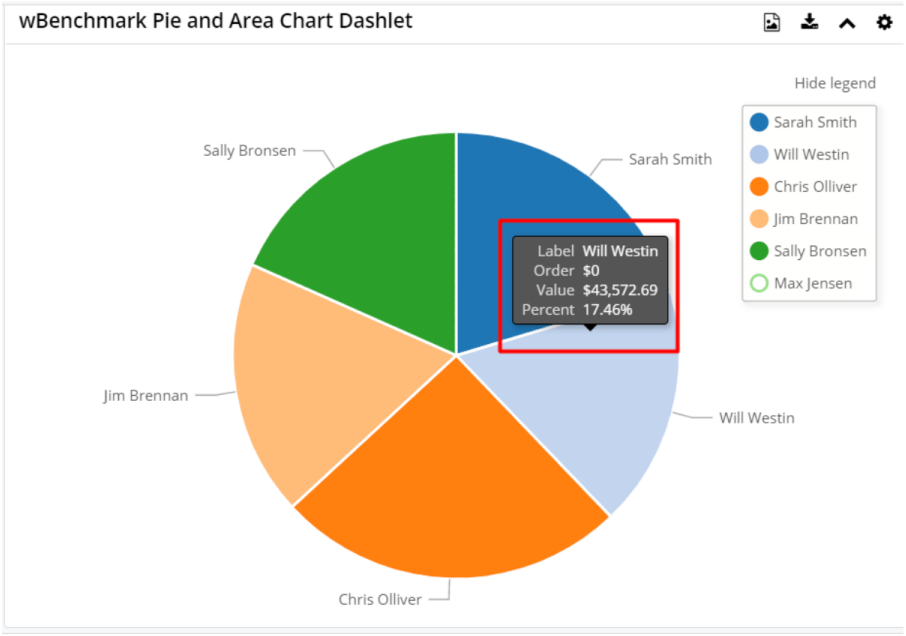
When this button is clicked a popup will appear on the screen with the image of the chart generated. The users can download the image via right click and "**Save image as...**" or can click on the image in order to copy it on clipboard:




**Download as Image to Local Computer** - This button will download the chart as a PNG image.




The tooltip will display the details on the chart.

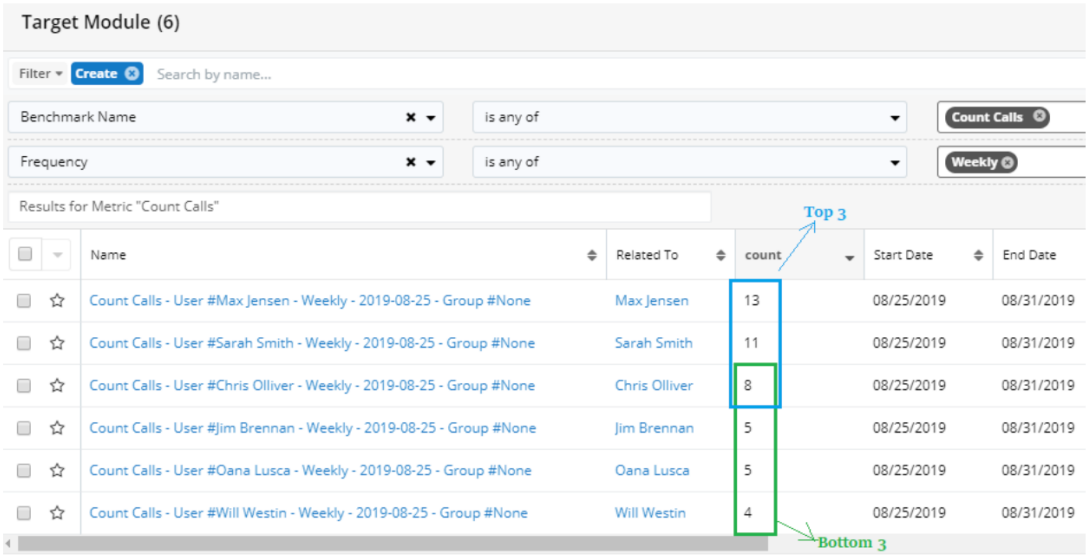



### The Top/Bottom N Functionality

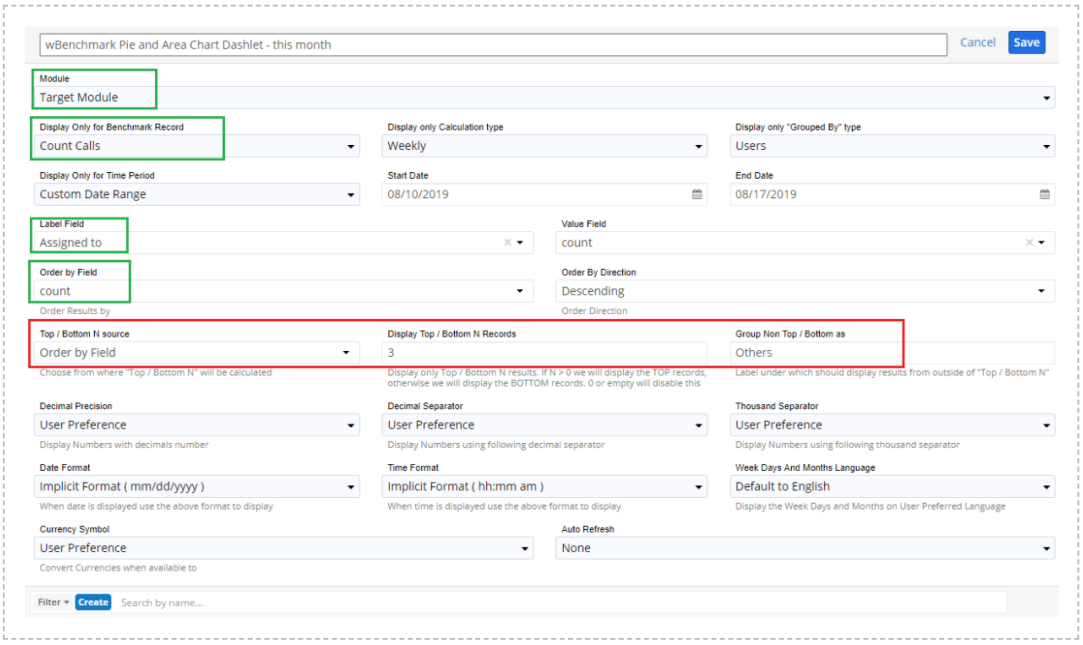
The **TOP N/BOTTOM N** function sorts the incoming data ascending or descending and then only returns a specific N number of records. Additionally, the records not included in the N number can be grouped together as a summary.

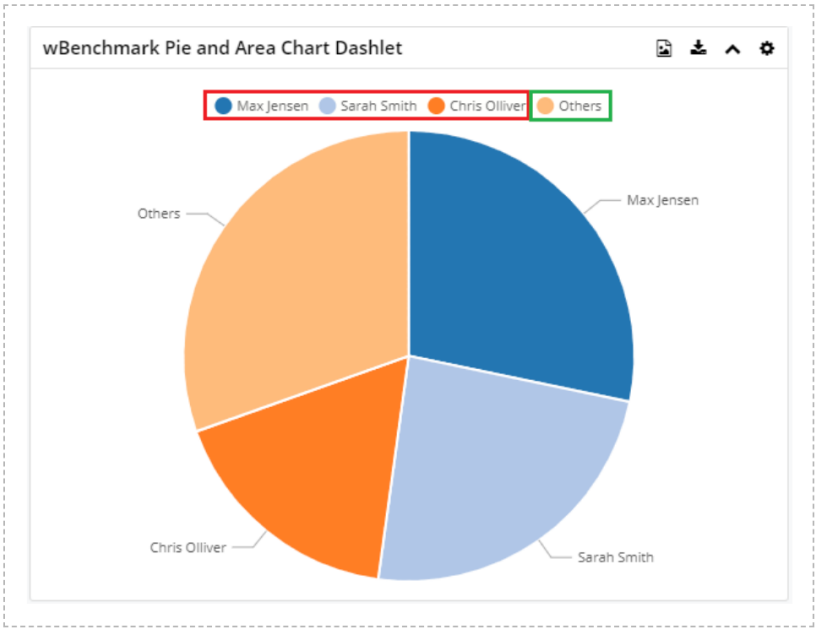
### Example 1: Top N

A client wishes to have a pie chart that displays all numbers of the Calls by user, in a given time period. However, the users have too many calls that can be easily displayed on a pie chart. The chart either is unreadable or won't display at all. Instead, the pie chart would be based on this result set and display the "top 3" Users with the bigger number of Calls. All other records would be grouped in an "Others" category.



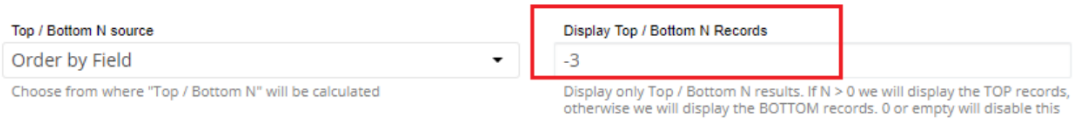

In the above case the **Top/Bottom N Source** is created by "**Order by Field = count**", and only the first three Users are displayed, all the other results being grouped as "Others":



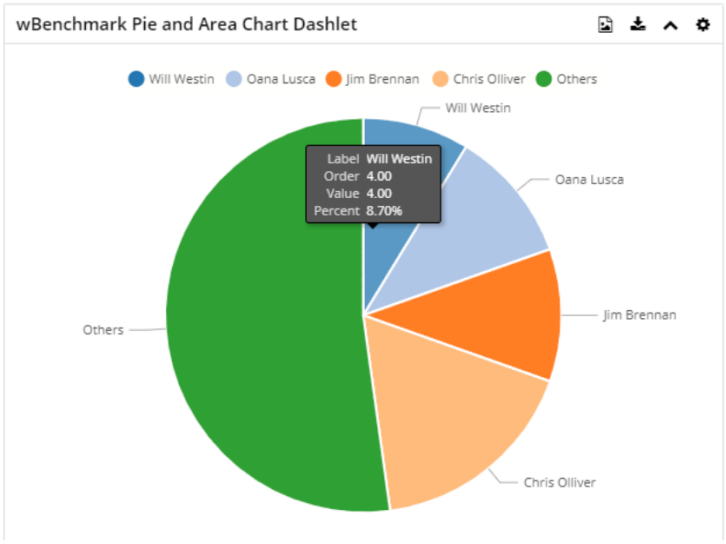




## Example 2: Bottom N

A client wishes to have a pie chart that displays all numbers of the Calls by user, in a given time period. However, the users have too many calls that can be easily displayed on a pie chart. The chart either is unreadable or won't display at all. Instead, the pie chart would be based on this result set and display the "bottom 3" Users with the lower number of Calls. All other records would be grouped in an "Others" category.

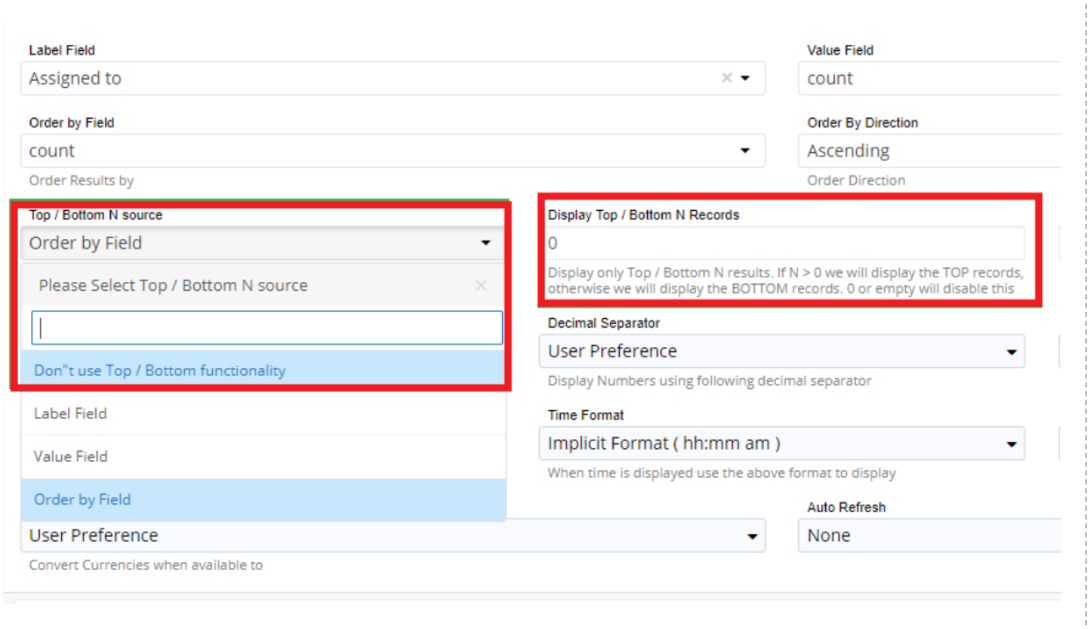



**Note**: When a negative value is used for the 'Display Top/Bottom N Records' field then, only the bottom record will be displayed.

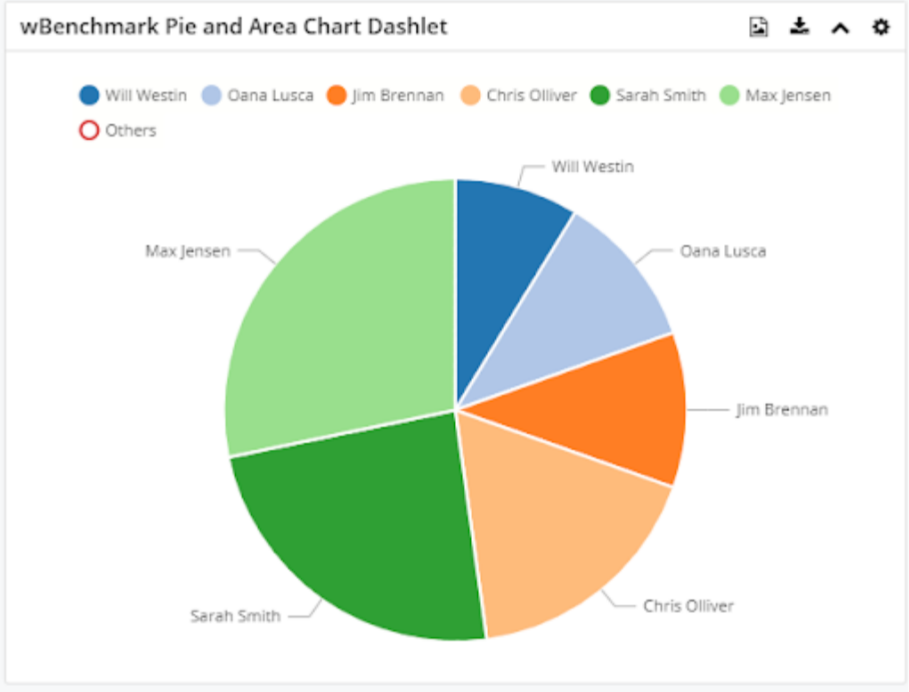



## Example 3: Disable the Top/Bottom N functionality

If the user needs to disable the Display Top/Bottom N Functionality, then the field Display Top / Bottom N Records = 0 or Top/Bottom N source = Don't Use Top/Bottom Functionality.



In this case all records will be displayed, not only top or bottom.

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