



**XPERT
TECHNOLOGIES**

RELEASE 4 - METIS SMART MONITORING

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1. INTRODUCTION

METIS Smart Monitoring is a reporting tool.

It is mainly intended for managers such as sales, product or marketing managers.

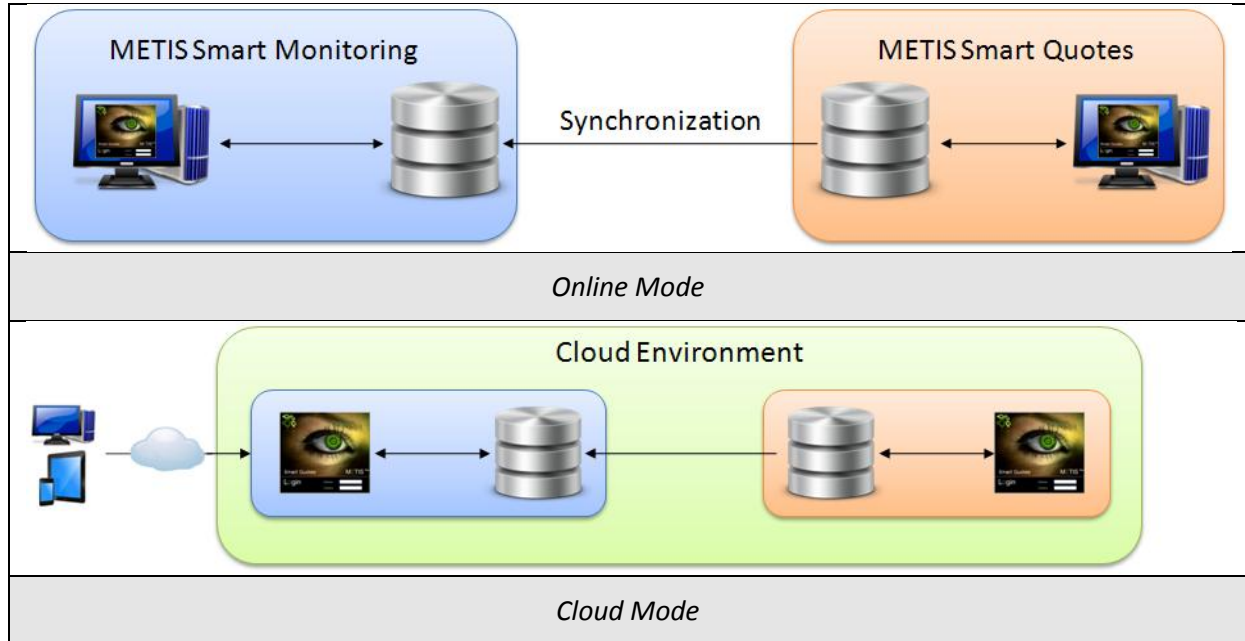
It supports those business professionals in gathering fundamental data and statistics about the generated offers, the sales trend or performance indicators.

This document aims at describing the functionalities and the features of METIS Smart Monitoring.

2. OPERATING MODE

METIS Smart Monitoring is a Web application.

METIS Smart Monitoring can work as shown in the following diagrams:



- **Online:** Offers made with Smart Quotes by the sales representatives are stored on a central database. Each time a Smart Monitoring user launches the execution of a report, offers are automatically synchronized from the Smart Quotes database to the Smart Monitoring database to always have up-to-date data.
- **Cloud:** The operating mode is identical to the online mode except that the Cloud environment is managed by Xpert Technologies. Smart Monitoring is accessible via the web (as well as the other METIS applications).

3. VERSION CONCEPT

Versions can be compared the various sales divisions or the different markets of a company. Each Smart Monitoring user gets a different access and contents depending upon the version he/she belongs to.

For more information, please refer to *METIS Smart Quotes' List of Features* document.

4. FEATURES AND CONTENTS MANAGEMENT

Some of the features described in this document can be enabled or disabled via a right. The set of data granted to the Smart Monitoring users is also managed via privileges.

The rights and the set of data are managed with another module of METIS Smart Suite named METIS Smart Modeling which is only accessible by an administrator.

5. LICENSE MANAGEMENT

To see the number of licenses currently activated, to whom, or when the user launched the application for the last time.

6. LOGIN

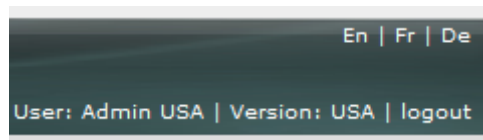
To access to certain versions or features depending upon the user's privileges:



- Password-protected application
- Access to customized features
- Access to customized set of data

7. LANGUAGE

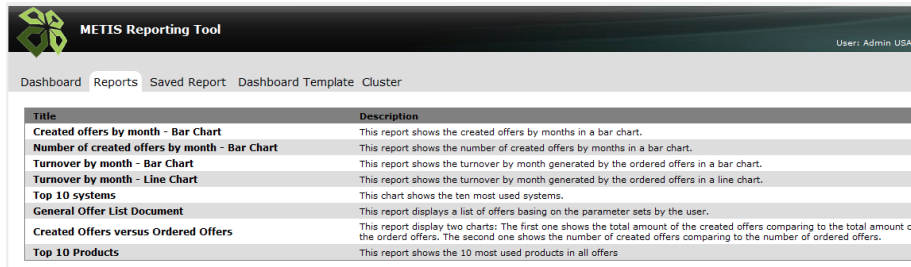
To select a preferred language for using Smart Monitoring.



- Several languages selectable depending upon the languages created and granted by the administrator
- Smart Monitoring' contents entirely translatable
- Support of Unicode characters (Chinese, Japanese, Russian, etc.)

8. LIST OF EMBEDDED REPORTS

To see the various types of reports that a Smart Monitoring user can generate by default.



Title	Description
Created offers by month - Bar Chart	This report shows the created offers by months in a bar chart.
Number of created offers by month - Bar Chart	This report shows the number of created offers by months in a bar chart.
Turnover by month - Bar Chart	This report shows the turnover by month generated by the ordered offers in a bar chart.
Turnover by month - Line Chart	This report shows the turnover by month generated by the ordered offers in a line chart.
Top 10 systems	This chart shows the ten most used systems.
General Offer List Document	This report displays a list of offers basing on the parameter sets by the user.
Created Offers versus Ordered Offers	This report display two charts: The first one shows the total amount of the created offers comparing to the total amount of the ordered offers. The second one shows the number of created offers comparing to the number of ordered offers.
Top 10 Products	This report shows the 10 most used products in all offers

- Line and bar charts
- Output of the “N” most used systems (“N” being a number defined by the Smart Monitoring user)
- Output of the 10 most used products
- Output of the revenue of all created offers per month
- Output of the amount of created offers per month
- Output of the turnover generated from the amount of ordered offers per month
- Output of the revenue generated from all created offers versus the revenue generated from all ordered offers
- Output of the number of created offers versus the number of ordered offers
- Output of customized reports

9. OUTPUT FORMATS

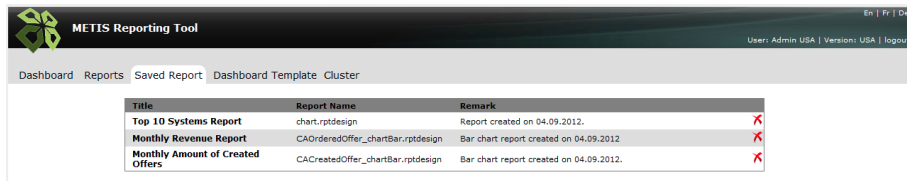
From a single report, it is possible to display the data in various ways (line chart, bar chart, table, etc.).

The reports can be generated in the following formats:

- Excel
- HTML
- PDF

10. LIST OF SAVED REPORTS

To see at a glance the list of reports saved by the Smart Monitoring user.



Title	Report Name	Remark
Top 10 Systems Report	chart.rptdesign	Report created on 04.09.2012.
Monthly Revenue Report	CAOrderedOffer_chartBar.rptdesign	Bar chart report created on 04.09.2012
Monthly Amount of Created Offers	CACreatedOffer_chartBar.rptdesign	Bar chart report created on 04.09.2012.

- Saving of the parameters of a report
- Re-run of a saved report at any time
- Usage of these reports within a dashboard template

11. REPORT PARAMETERS & FILTERS

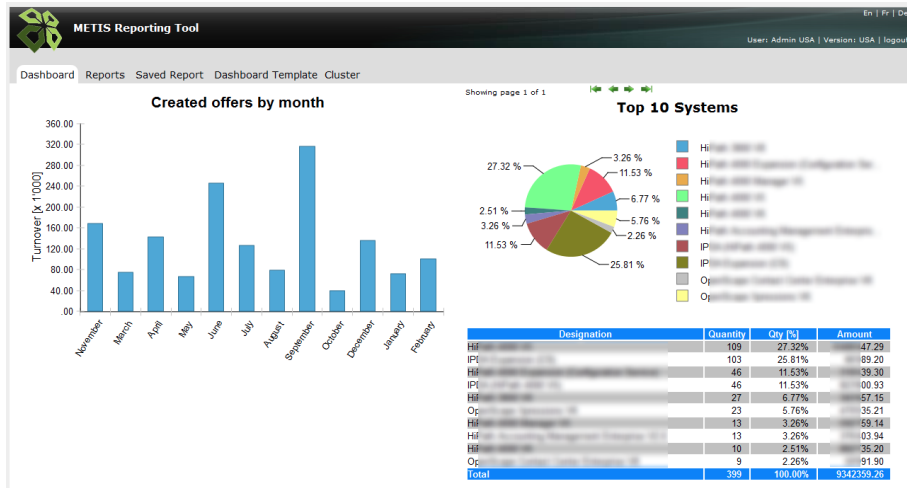
To generate reports from various input parameters or filters.

Description	Value
Output Format	HTML
Send By Mail	
Creation Date	Today
Office	
Include only active offer	
Include only ordered offer	
Amount greater than or equal to	
Amount lower than or equal to	
System	
Offer Type	
Sales Group	
Client	
Margin greater than or equal to [%]	
Margin lower than [%]	
Markup greater than or equal to [%]	
Markup lower than [%]	
Ordered Date	
Included Positions	

- Filter to include only offers created during a specific period
- Filter to include only offers ordered within a specific period
- Filter to include only offers for which the amount is comprised between a specific range
- Filter to include only offers for which the margin is comprised between a specific range
- Filter to include only offers for which the markup is comprised between a specific range
- Filter to include only active or ordered offers
- Filter to include only offers containing a specific system
- Filter to include only offers containing a specific product
- Filter to include only offers with a specific model type (generally new or extension offers)
- Filter to include only offers made by users belonging to a specific sales group
- Filter to include only offers made by users belonging to a specific office
- Filter to include only offers that include a specific customer

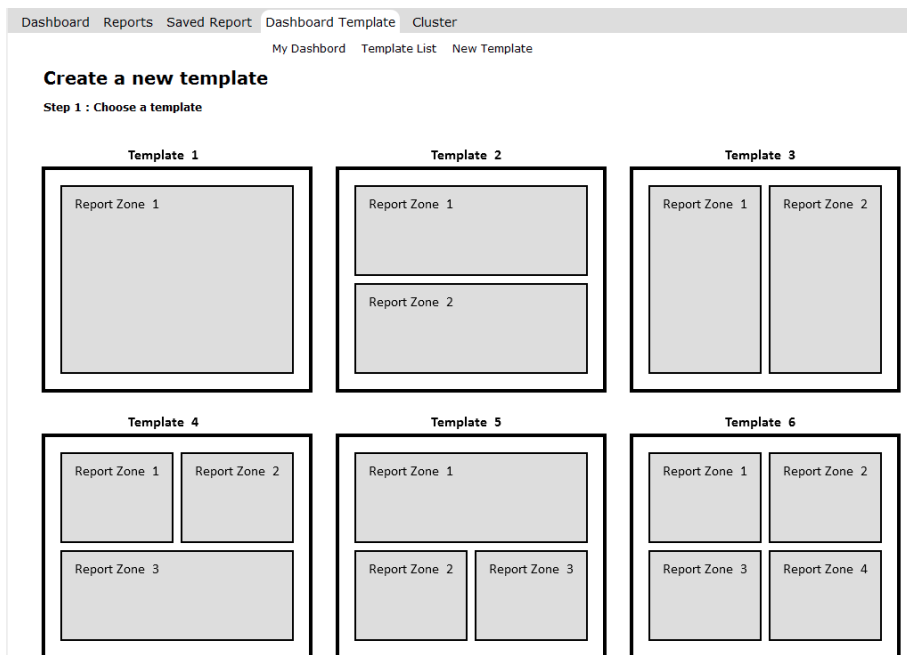
12. DASHBOARD

To see at a glance up to four reports at the same time.



13. DASHBOARD TEMPLATE

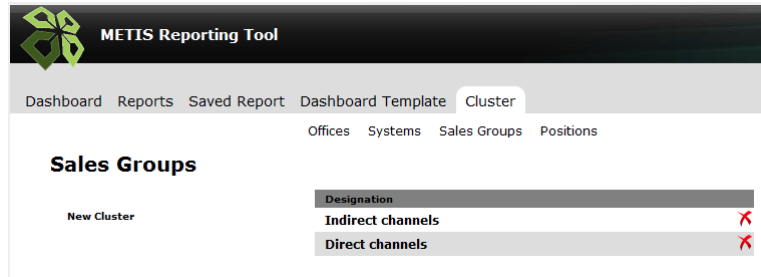
To create or use personal dashboard templates.



- Creation of personal dashboard templates
- Display of the list of created dashboard templates
- Selection of a default dashboard from a list of personal dashboard templates

14. CLUSTER

To create a set of parameters.



- Usage of a set of parameters as input for the reports
- Creation of one or several set of offices
- Creation of one or several set of systems
- Creation of one or several set of sales groups
- Creation of one or several set of positions

15. E-MAILING OF REPORTS

To send generated reports by e-mail.

Description	Value	
Output Format	HTML	
Send By Mail		

- Sending of the report automatically, upon generation of the report
- Sending of reports to oneself or to defined recipients

16. SCHEDULER

To plan the automatic execution of reports.

17. AUTOMATIC SYNCHRONIZATION OF OFFERS

Each time a report is generated then, beforehand, the offers made by the Smart Quotes user are automatically synchronized to the Smart Monitoring database. This task is performed as a background process.

18. SYNCHRONIZATION OF DATA

The set of data of the Smart Monitoring users is automatically updated and synchronized with the settings defined by the administrator. This task is performed as a background process.

However, if a piece of information has been deleted from the actual Smart Quotes database and that it is still in use in the offers present in the Smart Monitoring database (e.g. a sales person, a system, a product etc.), this piece of information is not deleted from the Smart Monitoring database (e.g. for use in sales history reports).

19. ABOUT METIS SMART MONITORING

To see details about the release and the user's version:

- Access to the Software License agreement
- Details about the logged-in user and database(s) to which the user is connected
- Details about the installation (release date, version of the components, etc.)
- Details about the contents granted to the Smart Monitoring user by the administrator

20. FURTHER CUSTOMIZATIONS UPON REQUEST

Xpert Technologies values the feedback of our customers.

New or additional functionalities can be integrated in METIS according to customer's needs on project basis by the Xpert Technologies development group.