Reporting Overview

Reports are used to retrieve and visualize statistics about orders, based on different details and topics. Several reports are provided out-of-the-box, while additional custom reports can be designed as needed. All reports can be viewed within the Kibo Composable Commerce Platform (KCCP) or exported as a file for external use.

Reporting Definitions

Before getting into the different aspects of the Reporting UI, here are some definitions that should be understood in order to browse reports:

- A **dashboard** is a homepage where all reports about a particular topic are displayed.
- **Filters** can be applied to those reports to specify the data being collected.
- Dashboards consist of **measures** and **tiles**.
    - A measure is an aggregated calculation. For example, an order has a tax total attribute that is the amount of tax charged to the customer. We could add a measure called Total Tax that is the sum of the tax total for all orders.
    - The dashboard is laid out as a series of tiles, which are the individual reports within the dashboard topic. These tiles display measures as well as additional data that are not aggregated calculations.
- **Explores** are a collection of data focused on a particular topic. They can be used for creating custom reports or ad hoc data exploration.
- Explores consist of **views**, which in turn are made up of measures, **dimensions**, and occasionally filters.
    - A view is a section of the explore that displays a group of related data. Views usually include an associated measure that indicates the total records for that element on the site, as well as a set of dimensions.
    - Dimensions are data values for a single record (like one order), in contrast to a measure that calculates the value for a set of records (like all orders). Dimensions are often related to API parameters; for instance, the Customer Explore includes a view that details customer datapoints found in the Customer APIs.

User Roles

Two types of user roles have the permissions necessary to access Reporting. A user can only view the Reporting application if they have one of these roles assigned to their account.

A **Report Viewer** can:

- View all the Kibo standard reports
- View any report in "Custom Reports" folder of the user's organization.
- Download an existing report/tile
- Send an existing report/tile to an email
- Setup a schedule to send a report/tile to an email

A **Report Editor** can:

- View all the Kibo standard reports
- Explore individual tiles in a report
- Create and save personal (visible to them), group (visible to other Editors), and custom reports
- Download an existing report/tile
- Send an existing report/tile to an email
- Setup a schedule to send a report/tile to an email

View Reports

There are report categories, or "dashboards," that are provided out-of-the-box as Kibo Standard Reports. Custom reports are detailed in their own section of this guide.

1. Go to **Main** > **Reports**, if you are not already viewing the reporting dashboard on the KCCP homepage.
   - The landing page displays the Order Dashboard with default filter options (specifically, displaying orders from all sites from the current month).
2. Click the folder icon in the top right. A navigation menu of the folder directory appears.
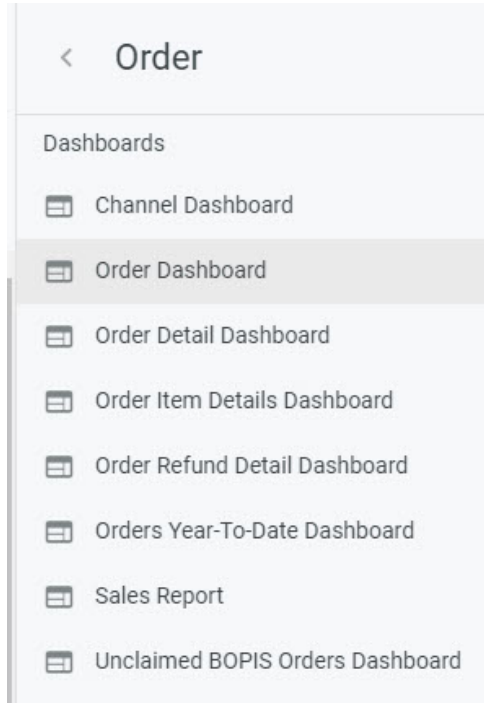3. Click **Shared**. Favorites and My Folder are personal folders that are empty by default.
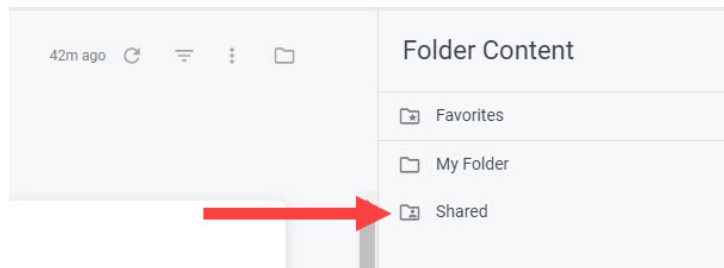
4. Click **Kibo Standard Reports**.
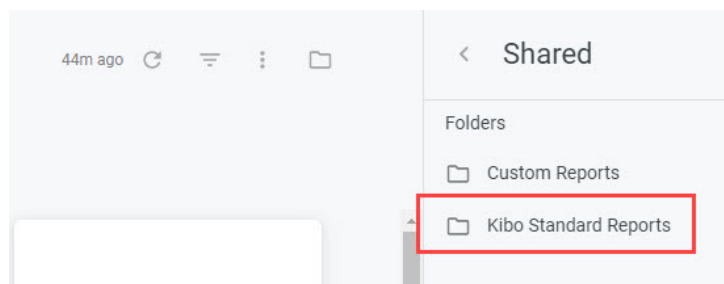
5. A list of all report topics is displayed. Select a topic.
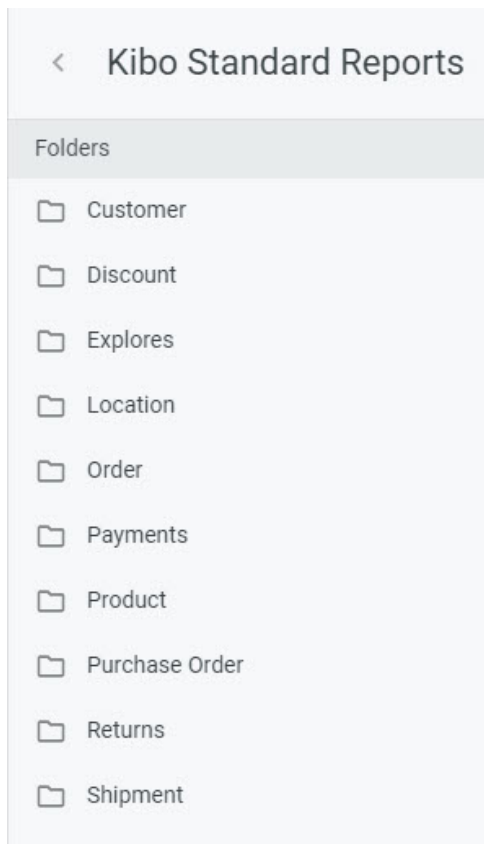
6. All of the dashboards within that report topic is displayed. Click any dashboard to view that specific report.

Dashboards

A dashboard is a homepage where all reports about a particular topic are displayed. There are numerous dashboards

for different topics in KCCP covering locations, discounts, shipments, products, orders, payments, purchase orders, returns, and more.
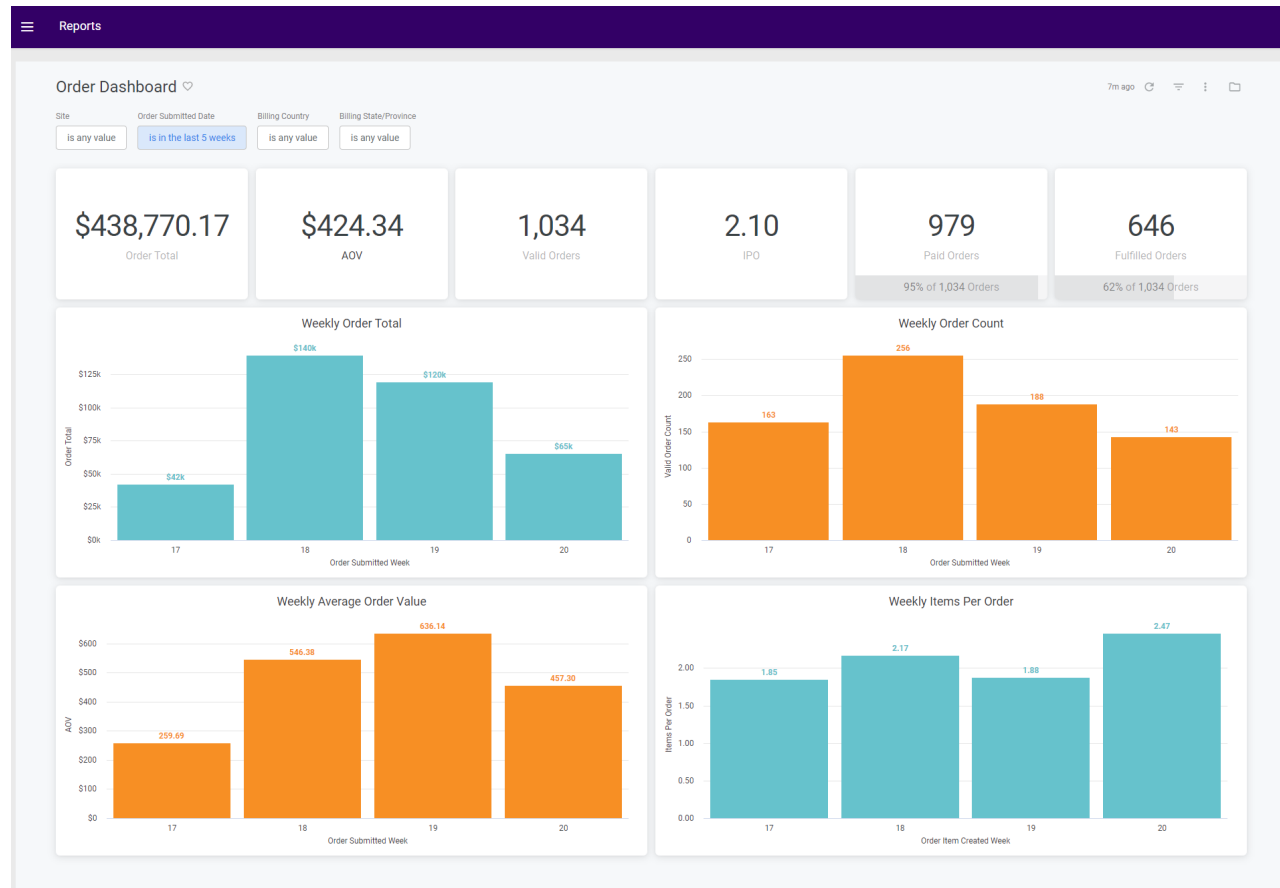
Dashboards consist of measures and tiles. A measure is an aggregated calculation. For example, an order has a tax total attribute that is the amount of tax charged to the customer. We could add a measure called Total Tax that is the sum of the tax total for all orders.

The dashboard is laid out as a series of tiles, which are the individual reports within the dashboard topic. These tiles display measures as well as additional data that are not aggregated calculations.

For example, the Order Dashboard shown above includes tiles for Order Total (which is an aggregated measure) and Weekly Order Total (which is not a measure). The former is displayed as simply a number, while the latter is displayed as a chart.

Explores and Views

Explores are a collection of data focused on a particular topic. They can be used for creating custom reports or ad hoc data exploration and can be found at Kibo Standard Reports → Explores.

Each of these explores contains at least one view that displays data. Views usually include an associated measure that indicates the total records for that element on the site, as well as a set of dimensions.

Dimensions are data values for a single record (like one order), in contrast to a measure that calculates the value for a set of records (like all orders). Dimensions are often related to API parameters; for instance, the Customer Explore

includes a view that details customer data points found in the Customer APIs.

Apply Filters

Each dashboard has a set of filters that can be applied to reports to specify the data being collected. Most reports will automatically open with the default filter options; however, some may require the user to provide a filter value before loading the report. Two common filters that are used for all dashboards are:

- Site: A multi-value filter to select specific sites in the organization. Set to all sites by default.
- Date: A single value filter indicating the date range in which to evaluate orders/shipments based on their creation date. This is set to the current month by default.

Filters are displayed at the top of the dashboard, but can be toggled on or off using a button in the top right.
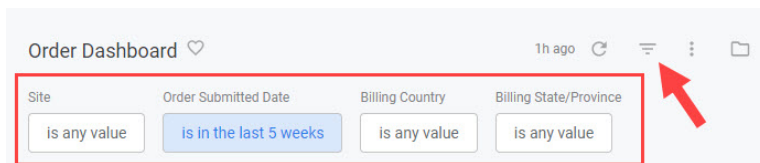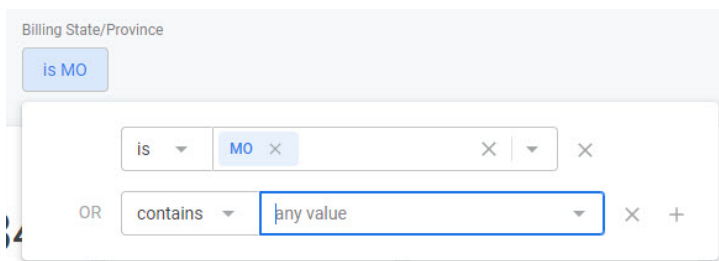

To edit a filter:

1. Click the box underneath a filter name that indicates the current value.
2. Editable fields appear to select the filter's comparison logic and value.
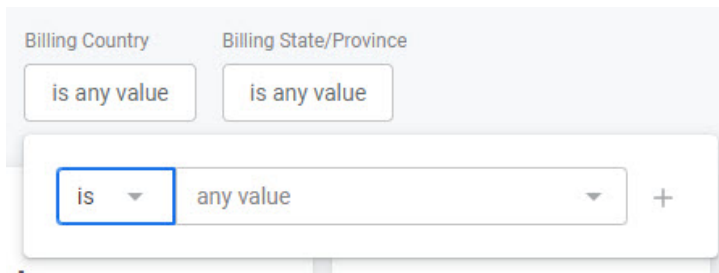
3. You can add additional criteria with the plus sign. Clicking the X will remove a criterion.
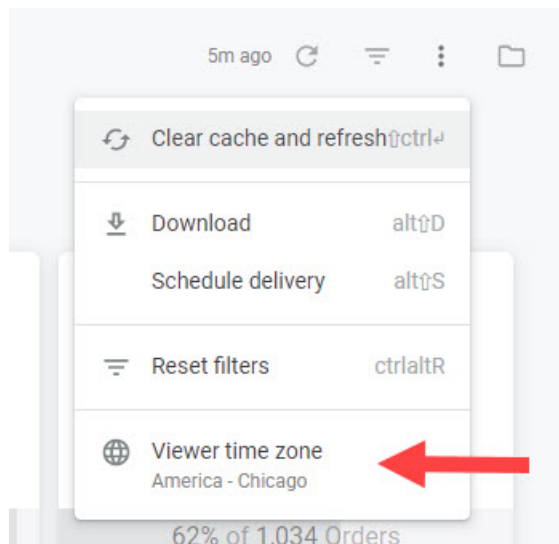

4. After changing filters, rerun the report with the button in the top right to update its data with the new configuration.
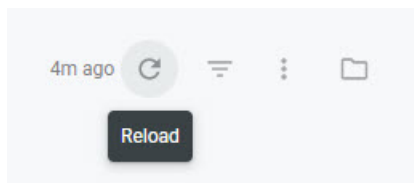
Update the Time Zone

All reports default to US Central Time (CST, or "America – Chicago") to perform date comparisons. This time zone preference can be changed in the top right by expanding the options menu, clicking **Viewer time zone**, and selecting a zone from the pop-up that appears.

As with filters, re-run the report after changing the time zone to regenerate the data based on the updated date comparison.

Reporting Currencies

Standard out-of-the-box reports and dashboards display all values in USD by default, and will convert any non-USD values when ingesting that data into the report. This conversion uses the exchange rate of the date that the originating event occurred (usually when the order was placed), as exchange rates are updated on a daily basis.

If you want your standard reports and dashboards to use a non-USD currency, you can have your default set to a different currency during the implementation process. Kibo recommends making this change during implementation rather than after it goes live, as this will not convert any historical reporting data to the new currency value. Any data that is compiled by reports after the setting change will be in the new currency and any data compiled before the change will remain in USD.

Alternatively, you can create custom reports based on "transactional" data fields instead. These fields will display values in their original currency without conversion, matching the order and shipment details in the Admin and Fulfiller UIs and API data. You can also use these fields to perform your own conversions if desired.

Explore

Order Refunds

Find a Field

🔍 order total ✕

All Fields | In Use

| Shipping Total |
| Shipping Total (Transactional) |
| Subtotal |
| Subtotal (Transactional) |
| Tax Total |
| Tax Total (Transactional) |
| Total |
| Total (Transactional) |
| Total Collected |
| Total Collected (Transactional) |

500 fields

▶ Filters (2) Order Refund Payment Interaction Interaction Type is "Credit"

▼ Visualization 📊 📈 📉 ⏱ ⋯ ✨ F

	Order Parent Checkout Number ⌄	Order Number	External Orde
1	25858	25859 ⋯	25858-25859
2	25858	25859 ⋯	25858-25859
3	25858	25859 ⋯	25858-25859
4	25739	25861 ⋯	25739-25861
5	25739	25861 ⋯	25739-25861

▼ Data | Results | Add calculation | Row Limit 500

Order Refund Reason	⚙	Order Refund Payment Interaction Created	⚙	Order Refund Order Number	⚙	Order External Order ID	⚙	Order Fir Name