Better Decisions Start Here

Vea Cloud

User Guide

Revision 2.0 | 12 February 2019

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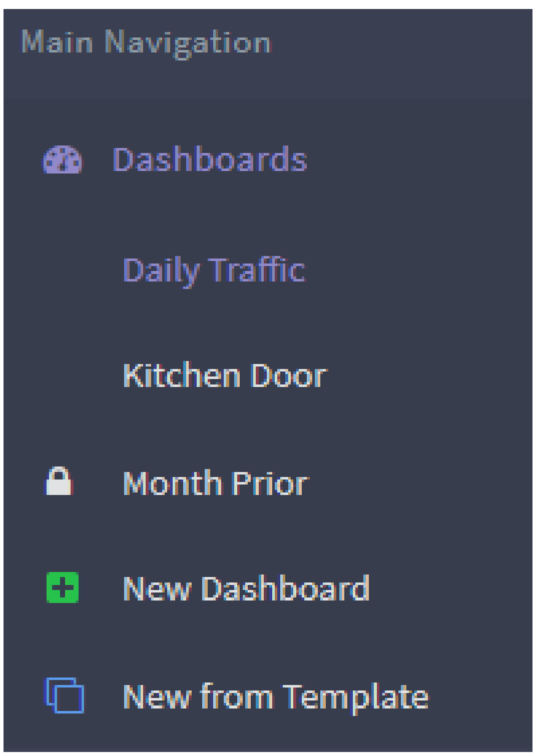
1.0 Dashboards

Overview:

Dashboards give you a visually appealing way to view your traffic data. They are customizable and shareable between your users. You will also have the ability to Email the dashboards out of the system on demand or on a predefined schedule.

Under Dashboards you will see the individual dashboards you have created and dashboards that have been shared with you. Shared dashboards that have been shared with you are denoted with a lock next to them as they are view only and you cannot adjust them. Shared dashboards that you have shared with others will have the people icon next to them, you can edit these shared dashboards and its changes will show to everyone who has access to it. You can also choose to create a new dashboard or select a dashboard that has been saved as a template by a SenSource representative.

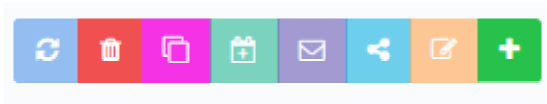
1.1 Creating a Dashboard:



- Start by clicking Dashboards on the main navigation pane. Click on New Dashboard to start creating your first dashboard.
- Once created, you will be greeted with a blank panel and several buttons in the top right hand side of your screen. We will go through what each of these buttons do while setting up your first dashboard.
- At the top of the screen you will see My Dashboard. You can click on this and rename your dashboard. Let's go ahead and rename this dashboard.
- You can also put a description in to help describe it more. Clicking the Green checkmark saves your name and description.
- Now that your dashboard is created, we can move on to the action buttons in the upper right hand corner.

1.2 Dashboard Action Buttons:

In the upper right hand corner of the screen you will see a row of buttons. These actions are used to manipulate your new dashboard.



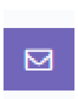
- **Refresh**: When you have data on the screen this button will update all of the widgets with the most recently available data, without reloading the entire website.

- **Delete**: This will delete the dashboard from your account. This cannot be undone, so you will want to be cautious when using it.

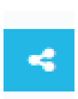
- **Duplicate**: Once you have a dashboard laid out and want to create another dashboard that looks similar you can select this option and it will create a copy of the first dashboard for you to edit.

Note: The next four buttons will become available after a widget has been added to the dashboard.

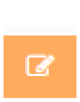
- **Schedule Dashboard**: This light green icon with the calendar on it allows you to schedule this dashboard to be emailed out automatically.



- **Email Immediately**: This is just a quick send report option. You can click this option pick a user or type an email address, Assign a subject and hit send. This will trigger the dashboard you are looking at to be sent immediately to someone.



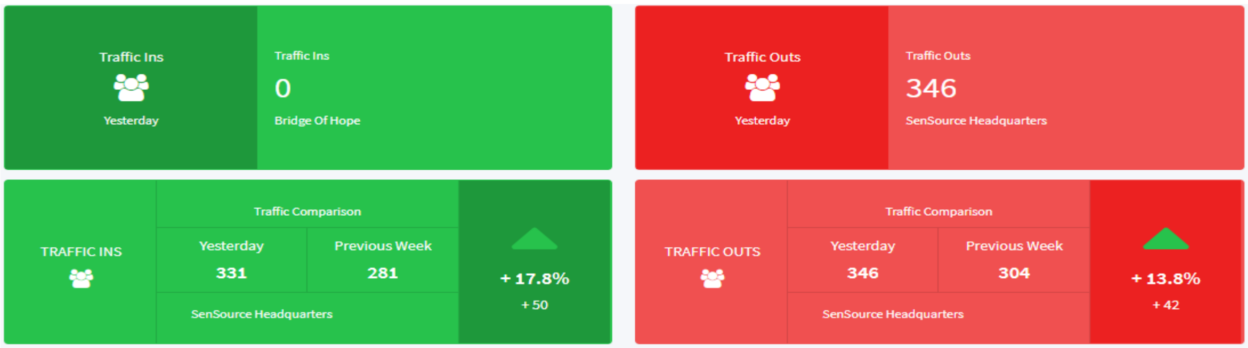
- **Share**: This allows you to share the dashboard with another user on the system. Just type in a name and hit Share. This creates a copy of the dashboard on that person's account. They can see / edit / delete like it is their own and it has no effect on yours.



- **Publish**: Once you have a layout created you can publish it to other users in your organization. If we click on Publish it will ask if you want to publish it or not. The next option is whether you want every user to see it or just a specific user or users. This creates a Read only copy of the dashboard for those people you specify

1.3 Dashboard Widgets:

At the top of the widget list you will see different categories depending on which sensors and services you have purchased. There are a lot of widgets you can choose from here. These widgets are used to see your data at a quick glance, allowing you to leave your dashboard on a separate monitor or TV screen.



1.4 Widget Configuration:

Let's begin by clicking the green plus sign icon and adding the first widget on the list. Once added, you will see the '**Configure Widget'** box.

1.4.1 Widget Options:

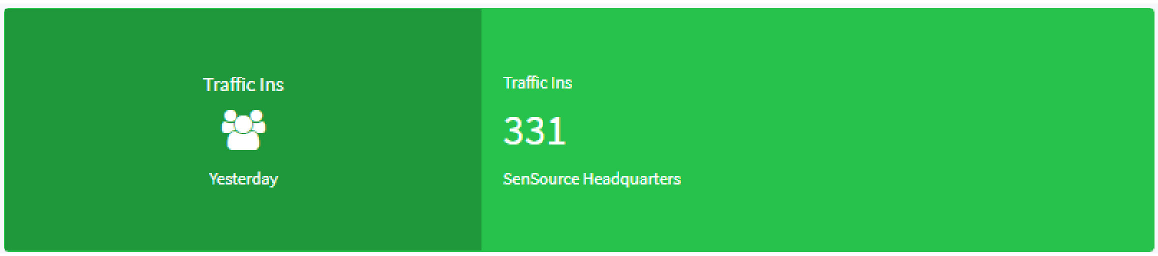
- **Refresh Interval**: This will tell the widget to refresh automatically if the dashboard is on screen for a long period of time. Leave this at 0 if you wish to manually refresh.
- **Color Theme**: You can setup a Color Theme if you have different locations or different data you want to identify by its color. Blue for in and Red for Out. Or Blue for Today and Red for yesterday.
- **Icon**: Set the icon which will show on the widget.
- **Label**: You can retitle the Widget as needed using the Label Textbox.
- **Data Format**: You can also change the Data Format where needed. (Rarely Used)

1.4.2 Data Options:

- **Input Values**: The Input Values field allows you to pick what data you want to see. Traffic in or Traffic out.
- **Date Range**: The Date Range field allows you to set a Date Range to view.
- **Data Grouping**: The Data Grouping Option allows you to pick what level of data you want to view. Location, Site, Sensor, Zone.
- **Groups to Show**: Groups to show will allow you to pick individual items based on your previous selection.
- **Exclude Closed Hours**: Coming up I will explain more about operating hours. But this option will ignore data the system has collected during your closed hours

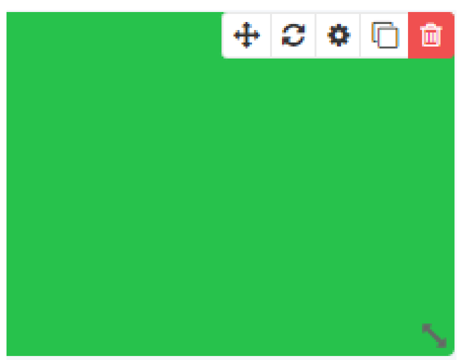
1.4.3 Widget Setup Example:

- Set the ‘Refresh Interval’ to 0. In this example, we’re going to be scheduling our dashboard to be sent out on a recurring basis.
- Set the ‘Color Theme’ to green, we’ll use this to denote INS.
- Change the ‘Label’ to “Traffic Ins”.
- Set the ‘Input Values’ to Traffic Ins. We’ll want to pull all IN counts from the database.
- Set the ‘Date Range’ to Yesterday. This dashboard will be used as a daily count. You can also set this to ‘Today’ if you would like today’s up-to-date counts.
- Set the ‘Data Grouping’ to Location. This will show all IN counts across every sensor in your location.
- Set the ‘Groups to Show’ as your organizations location
- Click ‘save widget’. You should see the following added to your dashboard.



1.4.4 Widget Action Buttons:

Putting your mouse over the widget will show you have some more controls. These widget action buttons will allow you to customize your dashboard widgets even further.



- **Move**: When you have multiple widgets on the screen you can move them around to suit.
- **Refresh**: This allows you to manually refresh the data of this widget.
- **Configuration Options**: This will bring up the widget configuration window.
- **Duplicate**: If you want to duplicate a widget you can do it here. This will add an exact copy of the widget onto the dashboard.
- **Delete**: This will prompt you to delete the selected widget from you dashboard.
- **Resize Widget**: In the lower right hand corner of the widget you will see a resize arrow. By clicking you can drag and resize the control.

1.4.5 Duplicating a Widget Example:

Duplicating widgets could help save you time when setting up new dashboards. Let's duplicate our Traffic Ins widget we made in the last example to show traffic outs.

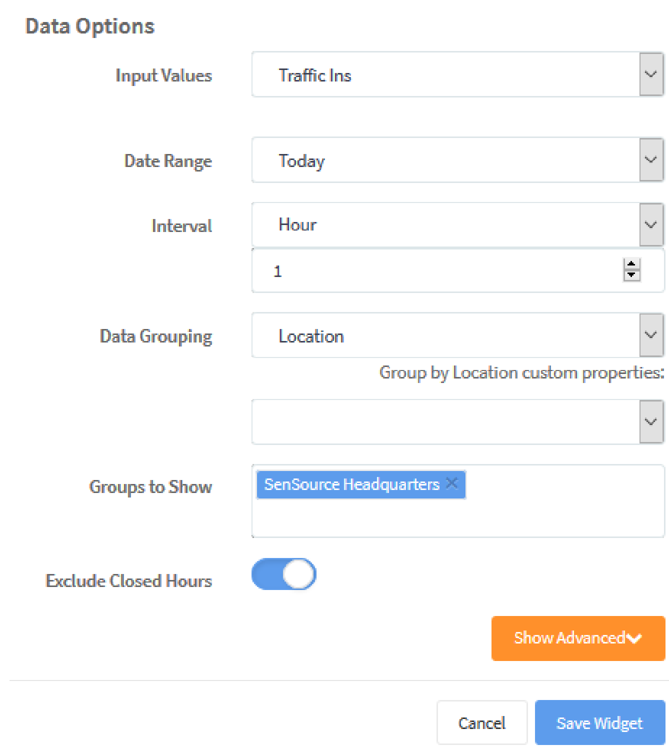
- First we click the duplicate button in the top right hand corner of the widget.
- Hover over the new widget that was created and click on the gear icon to open the Configure Widget Box.
- Set the 'Color Theme' to Red/Danger.
- Set the 'Label' to "Traffic Outs".
- Set the 'Input Values' to Traffic Outs.

Now you can use the first icon to move them so they are next to each other. You should now have a quick view of your Traffic Ins and Outs on your dashboard.

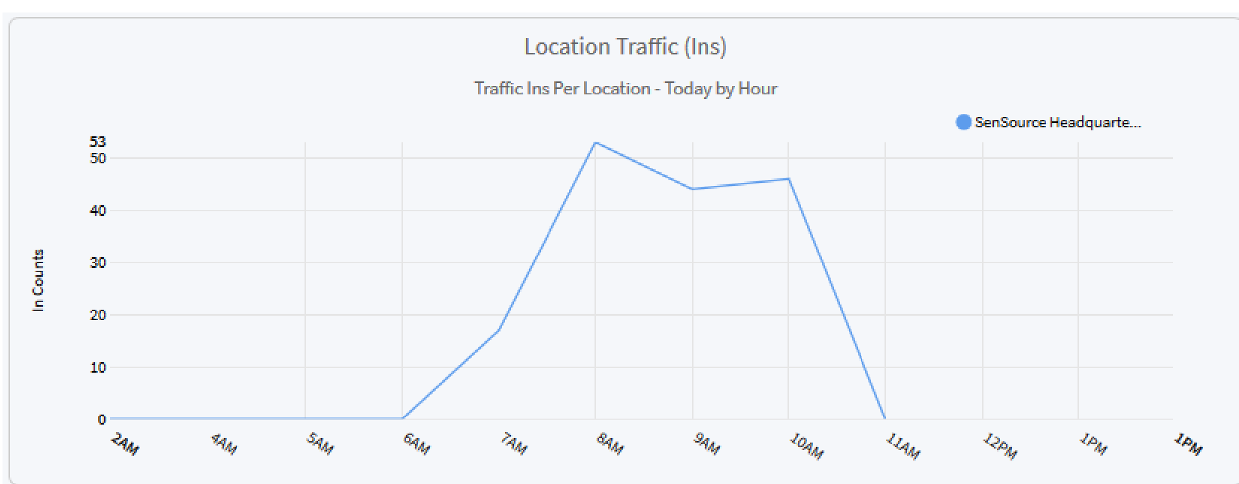
1.4.6 Adding a Graph Widget:

Ok now let's wrap up creating a dashboard by adding a Graph to our screen.

- Go to the Green add widget button in the upper right hand corner of the screen.
- Let's Scroll down to the first Location Traffic Graph and click on it.
- Again we are prompted with the widget configuration options.
- Now again we have the display options on the left of the page. We can leave these as is for now.
- On the right side we have our data options.
- Again we can choose out input Value. Set this to Traffic Ins
- Pick a date range for the amount of data we want. Let's set this to Today
- Set the interval of the data points. We want to see the hourly data, so set this to hour.
- Pick your Data grouping and specific data you want to see. Let's set this to Location and pick our location in the groups to show field.
- Select operating hours only and save.



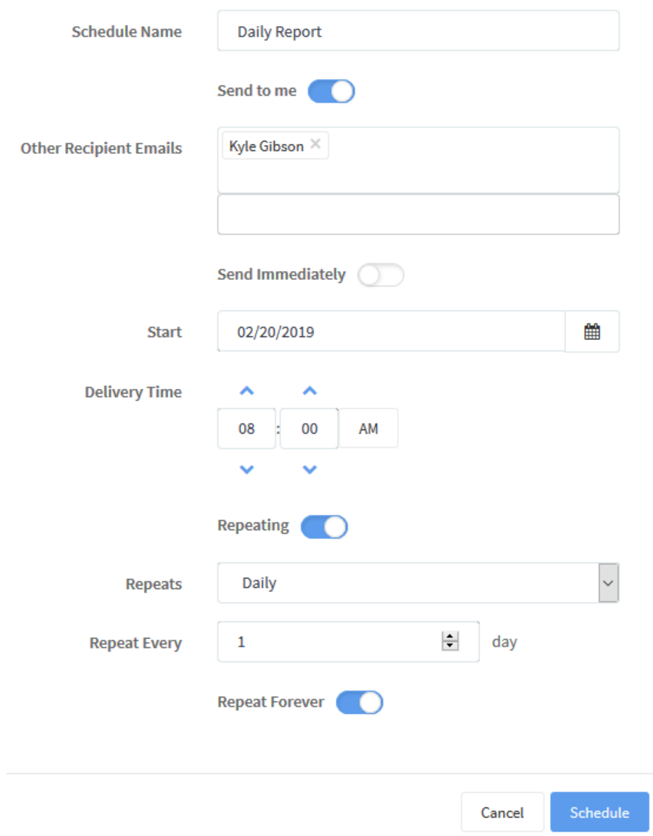
Now you have a nice graph as well to see the hour by hour traffic for the day.

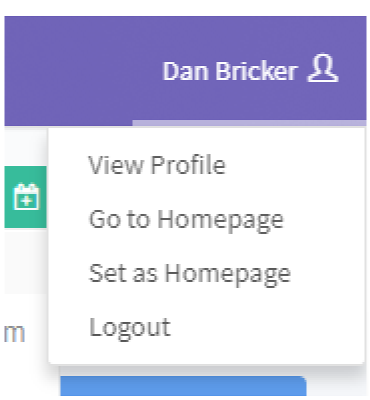


1.5 Scheduling Dashboards

Now that we have a basic dashboard setup, let's schedule it to be sent out daily.

- Click on the green calendar dashboard action button.
- Enter a schedule name. For example: Daily Report.
- The next option asks whether you should be included in this scheduled email. This is handy for system admins who do not need to see this data daily and are just setting it up for someone else.
- Next you can pick users on the system to send this to or in the second box type any valid email address even if they are not a user of the system.
- Send Immediately will do what it says and not allow you to schedule it.
- The next area is for setting the start date of this report and the delivery time.
- Set the delivery time to a preferred time. For example, if you want the report at 8:00 AM every morning, set this option to 8:00 AM.
- If we want this to happen every day you can choose repeating and then choose your interval and whether you want it to repeat forever or set an end date for the report.
- Click Schedule and you are all set for an automatic recurring report.





One Neat side note for you here. After you have a nice daily reporting dashboard setup. Click on your name in the upper right hand corner and choose SET AS HOMEPAGE. Upon logging in, you will see this dashboard as your homepage.

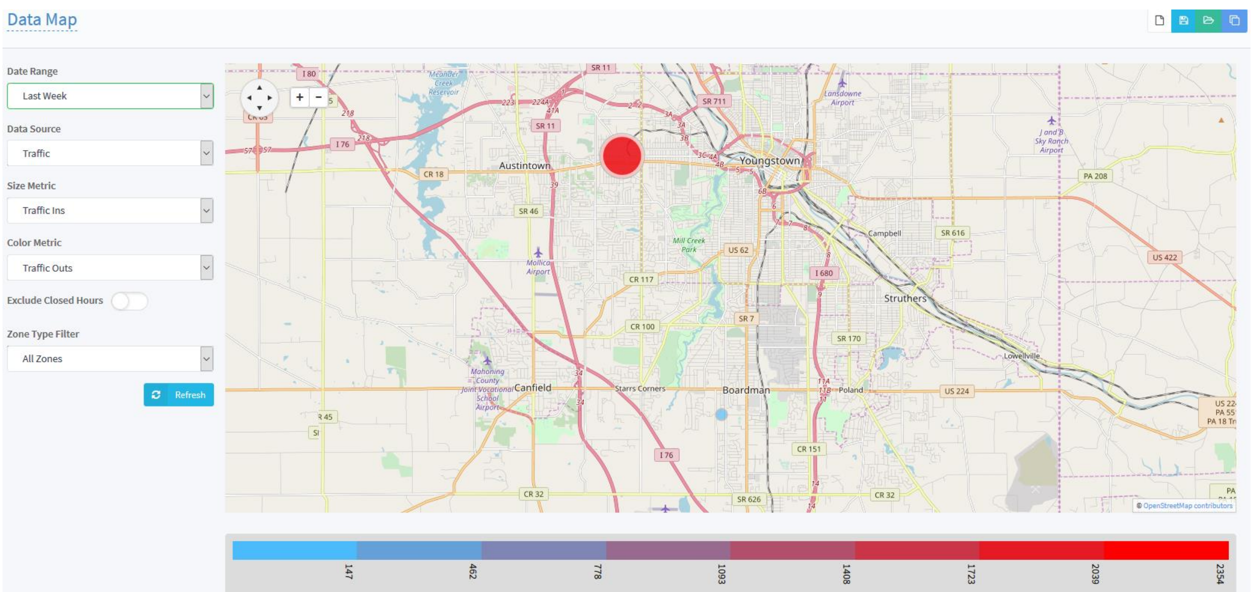
2.0 Data Views:

2.1 Data Map:

The first Data View we have is the Data Map. This view is geared more towards organizations with multiple locations. Your locations are placed on the map with the settings you choose from the left side of the page. Choose your date range and Data source.

The last two options allow you to set which value is tied to the Size of the circle and which value is tied to the color of the circle. You could set the Size to Traffic in and the color to Conversion Rate. This would allow you to see which locations have more traffic and which locations have more transactions at the same time. Clicking on a circle on the map will show you the data used to generate that circle.

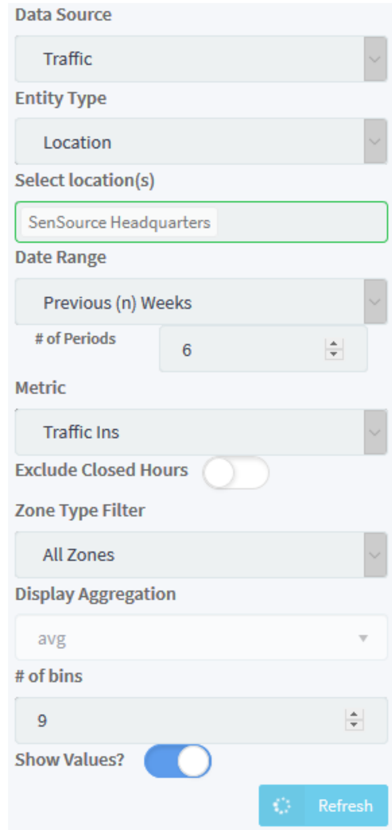
In the upper left you will see you can name your configuration and in the upper right hand corner you will see a set of controls for saving – loading and duplicating your configurations. Clicking on the Green folder will show you a list of your saved configurations and also give you the option to delete any that need removed.

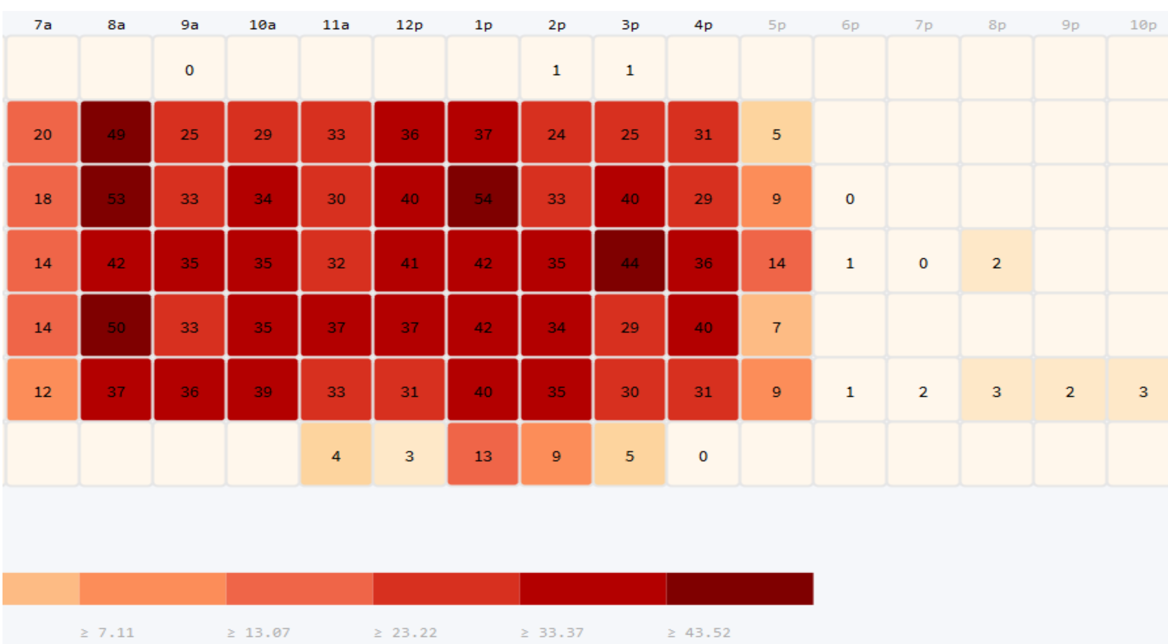


2.2 Day Hour Heat map:

Your Next Item in the Left Navigation is the Day Hour Heat map. This Utility allows you to view your average data for a time span. You can view, side by side, all hours in the week including which ones are busy and which ones are slow.

- You can start by Picking your Data Source and Entity Type.
- Select your location.
- Pick how much data you want to use in your analyzation.
- Then Pick your Metric and Aggregation style.
- Decide if you want to include or exclude closed hours.
- The last section just allows you to define the degree of color scale you want to see. Think shades of color. Click Refresh and your data is displayed. You can see here which hours of the day are your busiest and slowest for the data you selected.
- And again in the upper left you will see you can name your configuration and like the Data Map in the upper right you have the icons for save - load – duplicate and delete your different saved configurations.





2.3 Data Grid:

The Data Grid option allows you to view the raw data for your organization. It also allows you to export that data to an excel file (XLSX or CSV) to further manipulate the data.

2.3.1 Data Grid Options:

Across the top of the data grid, you will notice a few drop down boxes. These boxes tell Vea what data you would like to pull from the database.

From left to right, these options are:

- **Data Type**: The type of data you would like to pull. 'Traffic' is almost always used here.
- **Date Range**: The range of data would you like to pull. This can go from days to months, depending on your selection. There is also a 'custom' option, use this to select a specific date range.
- **Data Interval**: How you will view the data in that range. It can be by minute, by hour, by day, by week, or by month. This will change depending on the Date Range you have selected.
- **Data Grouping**: This will group the data based on your location, site, sensor, or zone. If you want data from all sensors in your organization, you would choose location. If you want to pick specific sites (i.e. Back door, Front Door) you would choose site.
- **Limit Data to Operating Hours**: If this is turned on, the data grid will only show data that has been collected within your set operating hours (section 6).
- **Data Zones**: This section should almost always be set to 'All Zones' by default. For further instruction on using this, please contact SenSource support.

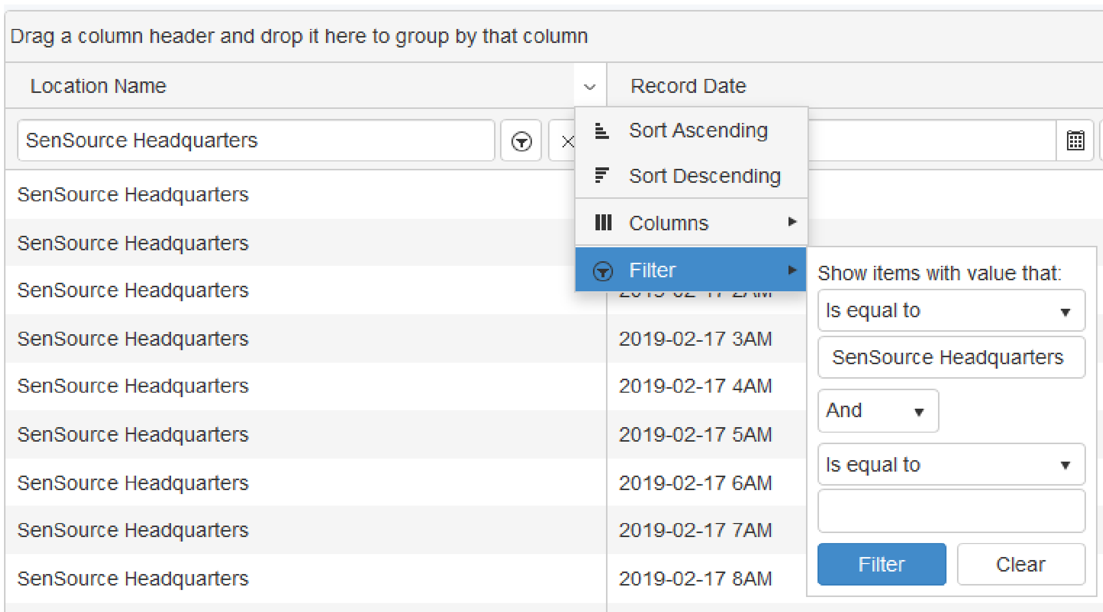
2.3.2 Setting up a Data Grid

Let's start by creating a data grid for Yesterday by Hour:

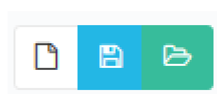
- Choose 'Traffic' for your data type
- Choose 'Yesterday' for your date range
- Choose 'Hour' for your interval. Choose '1' for 1 hour.
- Choose 'location' for your Data Grouping and click refresh.

2.3.3 Data Grid Filtering and Scheduling

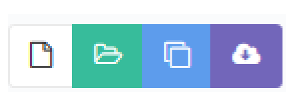
- Once the data is displayed below you can click on the column headers to sort the data.
- You have the option to add or remove columns using the down arrow next to any of the column names.
- You can also use the sort boxes at the head of each column to narrow your search even more.



- In the upper left you will see you can name your configuration and in upper right you have the icons for **new** - **save** – **load/delete** your different saved configurations.



- After saving your data view using the blue save icon, you will then see a Purple Cloud Icon for sharing this data with other people or scheduling automatic reports.



- Clicking on this icon gives you options to download your data in CSV, EXCEL or PDF format to your computer.
- You have the options to schedule a future email or emailing immediately. If you schedule a data grid email, it shows the same familiar dialog like in the dashboard area. (Section 1.5)

3.0 Locations:

The locations section in the Navigation allows you to setup different locations for your organization. By organizing your locations properly you can do report filtering based on different organizational information. Under each of the locations you can add custom fields using the blue icon at the top right corner to add more details like sales region / supplier / district. You can then use those fields in your data grids for further data consolidation.

*Care needs to be taken here, when deleting and moving sites you risk permanently deleting your traffic data for a given sensor or sensors, this **CANNOT** be undone.*

4.0 Sensors:

In this section, you will see a list of all sensors in your organization. Let's go over some of the columns:

- **Health**:
  - Green means the sensor is reporting properly and is currently healthy.
  - Orange means the sensor has missed two scheduled check in's in a row and is starting to fail.
  - Red means the sensor has missed 3 check-ins in a row and is considered offline.
- **Type**: This shows the type of sensor.
- **Sensor Info**: This will show some sensor information. Such as the sensor name, location, and site.
- **MAC**: The MAC address of the sensor.
- **IP**: The external IP address of the sensor.
- **Firmware**: The firmware version the sensor is currently running.
- **Created**: When the sensor first checked into the system via Data push.
- **Commissioned**: When the sensor was commissioned by a technician at SenSource.
- **Last Push**: The time since the sensor last communicated with Vea via a data push.
- **Expected**: The push interval on the sensor. Typically sensors are set to push data to Vea every 15 minutes.
- **Mute**: If you have a sensor that is routinely going offline for any number of reasons you can MUTE offline sensor notifications here. (See Section 8 for offline notifications).
  - After muting the sensor, you can see it in the list again by checking the box on the top right labeled "Show Periodic Use Sensors".

Note: Sensors that are offline but still powered up may continue to count. When the network connection is restored and the sensor can communicate with Vea, it will begin to back fill all retained data. The backfill could be from 1 week up to 120 days, depending on the type of sensor and its settings.

5.0 Users:

This section will give you a list of all of your organizations users and anyone you have invited that has not signed up yet.

Users:

In this top section you can see a list of the users and a few options to manage them:

- **Username**: Clicking on a person's email address in this top section allows you to assign different locations and roles to a user.
    - **Location Assignment**: If you want a user to only see a specific location, you would highlight it under the 'unassigned locations' and use the right arrow to assign it.
    - **Role Assignment**: If you would like to change a user from 'organization user' to an 'Organization Administrator' or vice versa, you would change that here.
- **Disable**: This will disable the users account until an administrator re-enables it.
- **Delete**: This will be used to delete a user's account. This action cannot be undone.

Note: If a user forgets their password, they should follow the instructions on the login page for forgotten password. The system will send them an automated password reset to the email associated with their account.

My Invitations:

This section will be used to invite users to your organization:

- **Invite New User by Email**: Enter the email of the user you would like to invite to your organization.
- **Organization Role**: Choose whether this person will be an 'Organization User' or 'Organization Administrator'.
- **Invite User**: Send the invite to the user. They will receive an automated email with the sign-up link.
- **Cancel**: If you've entered an incorrect email address or decide to not grant the user access, you can cancel the invitation. This option will disappear once the user signs up.

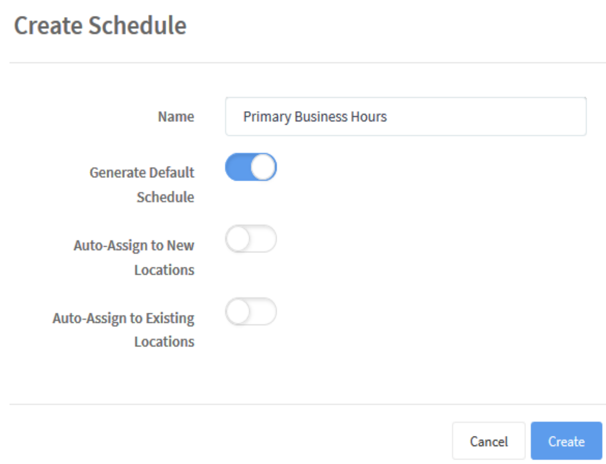
Note: If a user does not receive their invitation email, you can send that invite code manually and have them signup at https://vea.sensourceinc.com/#/register

6.0 Operating Hours:

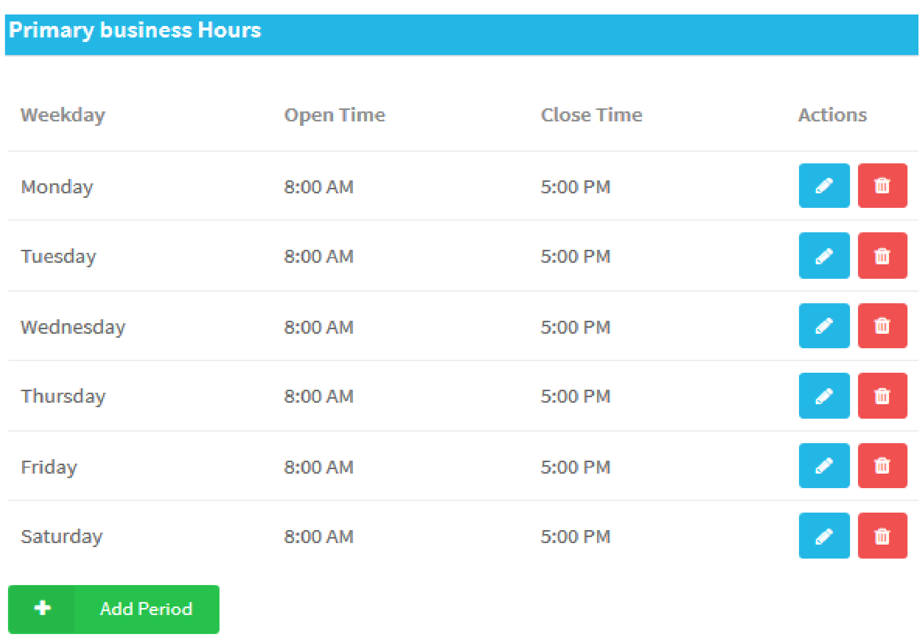
Operating Hours allow you to filter your data to include only pertinent traffic information and not include after hour's traffic.

Schedules:

- **Add Schedule**: This will create a new schedule
    - **Name**: Set the name of the schedule. For example, "Primary Business Hours".
    - **Generate Default Schedule**: This will generate a Sunday to Saturday week period, allowing you to go in and edit the times.
    - **Auto-Assign to New Locations**: All new locations added to your organization will automatically have this scheduled assigned to them
    - **Auto-Assign to Exiting Locations**: All existing locations in your organization will have this schedule assigned to them.



- After creating your schedule, you will want to 'Add Period' with your day of the week, open time, and close time.
- Once it is created you can setup your weekly normal operating hours. You can setup multiple schedules here for different locations and different times of the year.

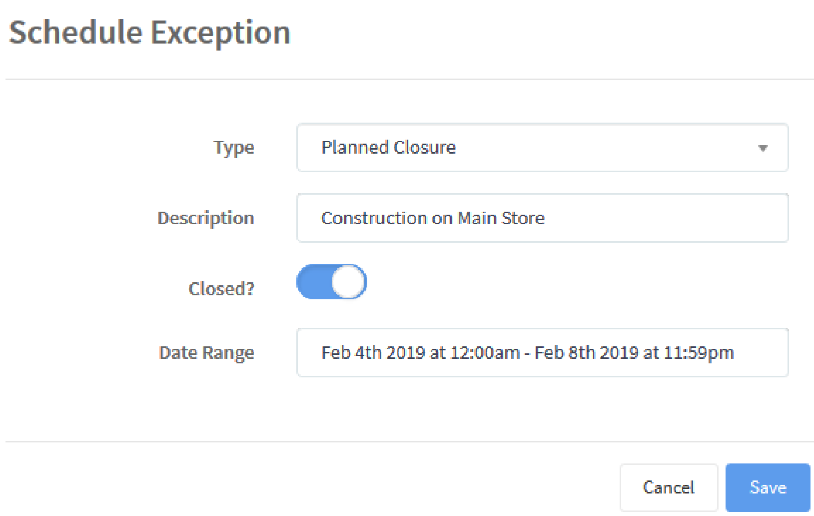


Weekday	Open Time	Close Time	Actions
Monday	8:00 AM	5:00 PM	
Tuesday	8:00 AM	5:00 PM	
Wednesday	8:00 AM	5:00 PM	
Thursday	8:00 AM	5:00 PM	
Friday	8:00 AM	5:00 PM	
Saturday	8:00 AM	5:00 PM	

Global Schedule Exceptions:

The next tab at the top of the screen is the global schedule exceptions. This will allow you to put organization wide schedule exceptions in place. Start by clicking the green 'Add Exception' button:

- **Type:** The type of exception you would like to setup. This can be a holiday, planned closure, extended hours, or other. Use the description box to provide further details.
- **Description:** The description of the exception. This could be the name of the holiday or reason for your organization to be open/closed on that day. For example, "Construction" could mean that the store is closed but workers are still entering. You do not want those workers included in your counts, so you would exclude them.
- **Closed?**: This slider tells the exception whether your location was closed that day. Change the slider to right – blue if you ARE closed.
- **Date Range:** Set the date range for your closure or extended hours.



Schedule Assignment:

The next Tab is the Schedule Assignment tab. Here is where you can pick a location and then assign the schedule to that location.

- First, select your location from the list on the left hand side.
- **Assign Schedules**:
  - Here you will assign those schedules that are setup in the 'Schedules' tab.
  - You can add, edit, or delete an assignment using this.
- **Add Location Exceptions**:
  - This is similar to the Global Schedule Exceptions; however, this allows you to setup an exception on the location level. This is useful if only one location in your organization is closed/open at a different time than your schedule.

7.0 Scheduled Deliveries:

The Scheduled Deliveries page is the next Item in the navigation. This allows you to review what dashboards and data grids have been sent out from the system.

Single Jobs:

- The top section shows you the single one time scheduled deliveries.
- You have options here to edit the schedule and delete the job here.
- This will also show you the status of the last time the job was processed and

Recurring Jobs:

- The bottom section shows you recurring jobs you have setup
- You have the open to edit or delete the schedule. This is useful if you need to add users to the list of recipients or change the date/time you the report runs.

Note: If you are scheduling a dashboard/data grid, for example on the 1st of the month for the previous month, your dashboard/data grid needs to be setup for 'Last Month' in all of the widget date range configurations.

8.0 Organization Settings:

- **System Notification Email Recipients**: If Vea Cloud is down for any reason, all users on this list will receive a notification via email.
- **Sensor Notification Email Recipients**: If any sensors in your organization are offline, all users on this list will receive a notification via email. This is triggered by the 'health' status in the sensors section.
- **Permit Comparison Views**: If this is enabled, you will permit non-admin users to compare data across the entire organization. For example, if your organization is broken up by location by store number, you may not want the users assigned to those locations to compare themselves with other stores.

9.0 Integrations:

Integrations Section allows advanced connections into VEA to pull data into your own data collection systems. Discussions about Integration are handled on a one on one basis between your developers and our integration team.