SHERKETY BYTES ALIGN

Sharing Reports and Supporting Decisions

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Exploring the Analytics Page Reporting Area

On the Reporting & Analytics page in Sherkety ERP & Website Platform, the reporting area is built around the same visual elements you already reviewed in Understanding Dashboards KPIs and Drill Down Analysis. What matters here is how those on-screen analytics are presented as something you can discuss with other people, not just inspect by yourself.

Expect the page to center attention on **KPI summaries**, **chart widgets**, and **report-style visual blocks** that make performance easier to explain in a meeting. KPI summaries give quick totals or headline values. Chart widgets show patterns over time or comparisons between categories. Together, these elements create a report-like view that is easier to present to managers, finance reviewers, or decision-makers than a raw list of numbers.

[SCREENSHOT: Reporting & Analytics page showing KPI cards at the top and chart widgets below]

As you move through the page, look for **share-related controls** attached to the analytics view. In Sherkety ERP & Website Platform, these controls may appear as a **Share** button, an action menu, or a report-level option near the charts or summary area. These entry points indicate that the current analytics view can be prepared for discussion with stakeholders.

The page also uses buyer-facing language to position analytics as a decision tool. Instead of showing metrics without context, the surrounding text emphasizes outcomes such as clearer visibility, easier collaboration, and stronger executive reporting. This messaging helps you understand that the page is meant for more than monitoring performance on-screen.

A useful distinction is this:

- **Viewing live analytics** means reading the current page, adjusting filters, and exploring results directly.

- **Preparing a shareable report view** means keeping the right metrics, date range, and chart context in place so another person can review the same story you are seeing.

That difference is what turns the analytics page from a dashboard into a stakeholder communication tool.

Understanding What Buyers Can Share with Stakeholders

When you share from the analytics page in Sherkety ERP & Website Platform, the most useful content is the information already visible in the current report view. That usually includes **KPI totals**, **trend charts**, **selected metrics**, and the **date range** currently applied on the page. If you have narrowed the page to a specific time period or focused on a particular set of results, that context becomes part of what makes the shared view meaningful.

This matters because stakeholders rarely need every available detail. A finance leader may want headline totals and movement over time. An operations manager may care more about trends, changes, or exceptions. An executive reviewer may need a concise view that combines top-level KPIs with one or two supporting charts. The analytics page supports this kind of audience-focused discussion by presenting data in a format that can be read quickly and discussed easily.

[SCREENSHOT: Analytics page with date range, selected metrics, KPI cards, and charts highlighted]

What you share is shaped by the current state of the page, including:

- The **date range** you selected
- Any **filters** currently applied
- The **metrics** visible in KPI cards
- The **charts** shown in the current view
- The overall report context used during your review

If you change the date range or switch to a different set of metrics before sharing, the report discussion changes too. That is why it helps to confirm the page view before opening the share action.

The messaging around the analytics page also suggests a broad stakeholder audience. The wording supports conversations with:

- **Finance leaders** reviewing business visibility

- **Operations managers** checking performance patterns
- **Executives** comparing outcomes and priorities
- **Evaluation teams** discussing ERP fit and reporting value

This makes the reporting experience feel collaborative rather than isolated. Instead of treating analytics as a private dashboard, Sherkety ERP & Website Platform presents it as a shared reference point that helps teams align around the same numbers, the same trends, and the same business questions.

Sharing Reports for Team Collaboration

To share a report view from the analytics page in Sherkety ERP & Website Platform, start by setting up the page exactly the way you want other people to see it. Confirm the **date range**, review the visible **KPI cards**, and make sure the **charts** on screen match the discussion you want to have. Once the page reflects the right story, use the visible sharing control.

1. Open the Reporting & Analytics page and adjust the view you want to discuss. Keep the correct KPI summaries, trend charts, and filters on screen.
2. Click the **Share** button or open the report action menu if the sharing option appears there.
3. In the share window, review the available choices. Depending on the screen, you may see options such as recipient entry, a generated link, access choices, or a message box.
4. Confirm that the current filtered view is the one being shared so collaborators receive the same date range, metrics, and chart context.
5. Complete the action by sending the share item or copying the generated link.

If the share window includes multiple choices, use them to keep the report focused:

Option	What to check
Recipient	Make sure the intended stakeholder is selected or entered correctly
Link	Confirm you are copying the current report view
Access or permission	Choose the level that matches the discussion need
Message	Add a short note explaining what the recipient should review

[SCREENSHOT: Share dialog opened from the analytics page]

After sharing, watch for confirmation feedback on screen. Sherkety ERP & Website Platform may show a **success message**, **copied link notice**, or another sent-status indicator. These messages are important because they confirm that the report view was actually shared.

For collaboration, the biggest advantage is consistency. When everyone opens the same shared view, the meeting starts with the same KPIs, the same charts, and the same time period already in place.

Using Decision-Support Messaging to Build Executive Confidence

The analytics page in Sherkety ERP & Website Platform does more than display numbers. It also uses decision-support messaging to explain why those numbers matter in business terms. This is especially helpful when you need to present analytics to leaders who care less about screen details and more about outcomes such as visibility, planning confidence, and operational control.

You will notice this messaging in places such as:

- Supporting text near **KPI summaries**
- Explanatory copy around **chart widgets**
- Benefit-focused statements in **reporting sections**
- Executive-oriented wording that frames analytics as a tool for better decisions

[SCREENSHOT: KPI cards and nearby supporting text that explains business value]

These message placements help translate raw analytics into a clearer narrative. A KPI total becomes more than a number when the surrounding text positions it as a signal of performance, efficiency, or business health. A trend chart becomes more useful when the page language suggests how it can support planning, review, or leadership alignment.

For buyers evaluating reporting capabilities, this matters because executive conversations usually require more than data alone. Stakeholders want to know:

- What is changing?
- Why does it matter?
- What action or decision does this support?

The page’s decision-support wording helps answer those questions without forcing you to build the explanation from scratch. It gives you language that connects analytics to practical outcomes, such as stronger oversight, faster review cycles, and clearer cross-team communication.

Sherkety ERP & Website Platform also combines collaboration and executive reporting in the same experience. The message is not just “here are your analytics.” It is closer to “here is a report view you can use with other people to make better decisions.” That combination builds confidence because it shows that reporting is designed for discussion, not just observation.

Presenting Analytics in Executive Reporting Conversations

When you bring analytics into an executive conversation, the most effective approach is to use the Reporting & Analytics page in Sherkety ERP & Website Platform as a structured talking point. Start with the **KPI summaries** at the top of the page, then move into the **trend visualizations**, and finally use the shared report view to keep everyone focused on the same numbers.

A simple presentation flow works well:

1. Begin with the headline KPI cards to establish the current position.
2. Use the charts to show whether performance is improving, declining, or staying stable over time.
3. Point out exceptions, spikes, or unusual changes that need leadership attention.
4. Keep the selected date range visible so everyone understands the reporting period being discussed.
5. Share the same report view with attendees so they can follow along without rebuilding the page themselves.

This approach helps leadership teams treat analytics as decision input rather than background information. Executives usually respond best to patterns and comparisons, not dense detail. On the page, that means focusing on:

- Summary KPIs instead of every available metric
- Trend direction instead of isolated values
- Comparisons across periods where visible
- Notable exceptions that may require action

[SCREENSHOT: Executive-style analytics discussion view with KPI cards and one primary trend chart]

Shared report views are especially useful in recurring review routines. A team can use the same style of report for:

- Weekly operations check-ins
- Monthly finance reviews
- Leadership planning discussions
- ERP evaluation meetings with internal stakeholders

The value of a consistent shared view is that it removes confusion. Everyone sees the same date range, the same metrics, and the same chart context. That makes conversations faster and more productive because the group can focus on interpretation and decisions instead of debating which version of the dashboard is correct.

Common Issues When Sharing Reports and How to Fix Them

Most report-sharing problems on the analytics page come from mismatched context rather than missing data. If a stakeholder opens a shared report and says it looks different from what you presented, the first thing to check is the page state you shared. In Sherkety ERP & Website Platform, the usefulness of a shared analytics view depends on preserving the same **filters**, **date range**, and **selected metrics** that were visible when you opened the share action.

If the recipient sees different results, review these items:

- Confirm the **date range** matches the one used in your meeting
- Check whether the same **metrics** are visible in the KPI area
- Make sure the same **chart view** is being referenced
- Reopen the shared item and compare it with your original page

Another common issue is that stakeholders do not understand why the numbers matter. In that case, do not rely on the chart alone. Use the page's **decision-support messaging**, KPI labels, and supporting text to explain the business meaning behind the values. This is often enough to turn a confusing chart into a useful discussion point.

If the report does not feel executive-ready, simplify the view before sharing. Focus on:

- Headline KPI summaries
- One or two clear trend charts

- The most relevant reporting period
- A concise explanation of what changed

[SCREENSHOT: Focused analytics view prepared for stakeholder sharing]

Collaboration can also stall after the report is shared. If that happens, verify three things:

- The recipient actually received the link or shared item
- They can open the report view successfully
- They understand what they are expected to review or decide

A short message attached to the share action can help. Instead of sending a report with no context, share it with a note about the KPI trend, the reporting period, or the decision you want the group to discuss. That small step often makes the difference between passive viewing and useful collaboration.

Overview

Sherkety ERP & Website Platform positions the Reporting & Analytics page as both a viewing space and a communication tool. The page combines **KPI cards**, **charts**, and **decision-support text** so buyers can do more than inspect performance on screen. They can also prepare a clear report view for managers, finance reviewers, and executive stakeholders.

The key idea in this document is that sharing works best when the analytics page is already in the right state before you send it. The selected **date range**, visible **metrics**, and current **chart context** shape what other people will understand when they open the report. A shared view is most useful when it reflects the exact discussion you want to have.

Important points to remember:

- **Live analytics** are for exploring and reviewing on screen
- **Shared report views** are for aligning other people around the same numbers
- **KPI summaries** help leadership audiences grasp the headline picture quickly
- **Trend charts** support conversations about movement, change, and priorities
- **Decision-support messaging** helps translate data into business meaning
- **Share actions** are most effective when paired with a focused report view

This reporting experience is especially valuable when multiple people need to evaluate the same information without rebuilding dashboards manually. Whether the conversation is about operational performance, finance visibility, or ERP evaluation, a consistent shared view reduces confusion and improves alignment.

If you need a refresher on how to read the KPI cards and chart details before sharing them, return to Understanding Dashboards KPIs and Drill Down Analysis. The next step in this learning path is Understanding Reporting and Analytics Module Value, which connects these reporting features to the broader business case.

Prerequisites

Before using report sharing and decision-support messaging effectively in Sherkety ERP & Website Platform, make sure you are comfortable with the basic analytics page layout and can identify the main reporting elements on screen. This topic assumes you already know how to read KPI summaries and chart widgets from the previous lesson.

You should be able to do the following before applying the steps in this guide:

- Open the **Reporting & Analytics** page from the public ERP content area
- Recognize the main **KPI cards** and **chart widgets**
- Understand how the current **date range** or visible report context affects what you are seeing
- Identify the visible **Share** button or report action area if it appears on the page
- Read the page's supporting text and benefit-focused messaging alongside the analytics

Helpful background reading:

- Exploring Reporting and Analytics Capabilities
- Understanding Dashboards KPIs and Drill Down Analysis

It also helps to have a clear audience in mind before you share a report view. The page is easier to use when you already know whether you are preparing the report for:

- An executive overview
- A finance review
- An operations discussion
- An internal ERP evaluation meeting

If you are planning to present analytics in a meeting, decide in advance which KPI summaries and charts best support the conversation. That way, when you use the share action, the recipient opens a report view that already matches the discussion instead of a general dashboard state.