SHERKETY BYTES ALIGN

Understanding Dashboards KPIs and Drill Down Analysis

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Reading the reporting page at a glance

In Sherkety ERP & Website Platform, the reporting page is easiest to understand when you read it from top to bottom. The top area usually acts as the **dashboard summary**. This is where you look first for **KPI cards** that highlight the most important numbers on the page. Each card is designed to answer a quick management question, such as whether a result is improving, falling behind, or staying stable.

A KPI card typically includes:

- A **metric label** that tells you what the number represents
- A **current value** shown prominently in larger text
- A **comparison value** or **trend indicator**
- A visual cue such as **color**, **arrow direction**, or emphasis that helps you spot movement quickly

Below the KPI cards, the main body of the page usually contains **charts**, **report blocks**, or other visual summaries. These help you move beyond the headline number and see patterns, such as whether performance changed over time or whether one segment is driving the result.

You will also rely on the **filter controls** on the page. These controls narrow the reporting scope before you interpret the numbers. Common examples include a **date range picker** and selectors for business dimensions such as company or team. When you change these controls, the KPI cards and report visuals update to reflect that selection.

Managers usually use this page differently from day-to-day operational users. Instead of starting with individual records, they:

- Scan the **headline KPI cards**
- Notice any unusual movement or underperformance
- Open a **drill-down view** only when a number needs explanation

That makes the reporting experience feel layered rather than overwhelming:

- **Dashboard summary**
- **KPI selection**
- **Filtered detail view**
- **Record-level investigation**

[SCREENSHOT: reporting page showing KPI cards at the top, charts in the middle, and filter controls above the report area]

If you need a broader introduction to the reporting area before focusing on KPI behavior, see Exploring Reporting and Analytics Capabilities.

Understanding what each KPI is telling you

A **KPI card** turns a large amount of business activity into one clear number. On the reporting page in Sherkety ERP & Website Platform, each card is meant to be read as a compact summary, not as a full explanation. Start by checking the **metric name**, then the **aggregated value**, and then the **time period** currently applied through the page filters.

When you read a KPI card, pay attention to these parts:

- The **metric title**, which tells you what is being measured
- The **main value**, which shows the current result for the selected filters
- The **comparison area**, which may show direction, difference, or relative change
- The **visual status cue**, such as an upward arrow, downward arrow, or color emphasis

Comparison behavior matters because a number on its own can be misleading. A KPI becomes useful when you can tell whether it is:

- Better than the **previous period**
- Behind or ahead of a **target**
- Moving in a positive or negative **trend direction**

The page filters directly affect what each KPI means. If you change the **date range**, the card recalculates for that period. If you narrow the view to one **company**, **business unit**, or other reporting dimension, the card reflects only that slice. This is why two users can look at the same KPI label and see different values depending on the active filters.

During a product demo, buyers should ask to see KPI cards that reflect common management questions, such as:

- **Revenue growth**
- **Overdue items**
- **Margin movement**
- **Pipeline conversion**
- Other role-based headline measures relevant to finance, sales, or operations

A strong KPI card helps you answer, at a glance, whether something deserves attention. It should not force you to guess what period is being shown or what comparison is being made. Clear labels, visible trend indicators, and obvious filter context are what make the card useful in real management reviews.

Changing filters to focus on the right business slice

The filter bar is what turns a general dashboard into a decision-making tool. In Sherkety ERP & Website Platform, you use the reporting page filters to control exactly which business slice the KPI cards and charts should represent. The most common starting point is the **date range**. When you choose a different period, the page refreshes so the KPI cards and visual summaries reflect that selection.

A typical filtering workflow looks like this:

- Open the **date range picker**
- Choose the period you want to review
- Watch the **KPI cards** and report visuals update
- Narrow further using business selectors if needed

Beyond time filters, the reporting page may include selectors for business dimensions such as:

- **Company**
- **Team**
- **Department**
- **Region**
- **Salesperson**

These controls help you isolate the exact segment you want to review. For example, a manager might begin with an all-company view, then switch to a single branch to see whether the same KPI trend still holds. You can also compare the same KPI across different periods, such as changing from **this quarter** to **last quarter**, to understand whether a result is part of a longer pattern or a recent shift.

When you change filters, focus on how the KPI behaves under each combination:

- Does the issue appear only in one branch?
- Does the trend improve when you switch to a different team?
- Does a weak result disappear when you move to a different time period?

This kind of comparison is where the reporting page becomes practical for management review.

If your analysis starts to feel too narrow, clear the active filters and return to the broader dashboard view before beginning a new investigation path. That reset is important because it prevents you from drawing conclusions from an overly limited slice of data.

[SCREENSHOT: filter bar with date range and business selectors above KPI cards]

For more help with date controls and filter-style interactions elsewhere in Sherkety ERP & Website Platform, see Selecting Single Dates and Date Ranges.

Drilling down from a KPI into detailed analysis

A KPI card tells you **what** changed. The drill-down view helps you find **why** it changed. In Sherkety ERP & Website Platform, you typically begin by clicking a **KPI card** or a related chart element when a number needs explanation. That action opens a more detailed report while carrying over the filters already selected on the dashboard.

This matters because you should not have to rebuild your analysis after leaving the summary view. A useful drill-down keeps the same context, including the active **date range** and any selected business dimensions, so you can continue investigating without starting over.

Once the detailed analysis opens, the screen usually replaces the single KPI value with richer information such as:

- **Grouped rows** that break the number into categories
- **Charts** that show where the movement is concentrated
- **Transaction lists** or detailed entries behind the total

At this stage, use the extra controls available in the detailed view to narrow the cause. Depending on the report, that may include options for:

- **Grouping** results by a business dimension
- **Sorting** to bring the largest contributors to the top
- Applying **secondary filters** for a more focused review

This is how you move from a broad headline metric to a specific explanation, such as one team, one region, one product line, or one customer segment driving the result.

If the grouped report still does not answer the question, open an individual result from the drill-down list to inspect the underlying record. That record-level step is especially useful when you need to confirm whether the issue is caused by a few large items or by a wider pattern across many smaller entries.

[SCREENSHOT: drill-down report opened from a KPI card, showing grouped rows and detailed results]

The best drill-down experience feels continuous: summary first, detail second, evidence third.

Using drill-down analysis to answer management questions

Drill-down analysis is most valuable when you use it to answer a real management question instead of browsing numbers without a purpose. In Sherkety ERP & Website Platform, a common workflow starts with a KPI that shows a decline or an unusual spike. From there, you open the detailed report and isolate the dimension responsible for the change.

A simple variance investigation often follows this pattern:

- Spot a KPI with a negative trend or unexpected movement
- Open the **drill-down view**
- Compare the detailed results by segment
- Identify which slice is driving the variance
- Open supporting records if you need proof at the document level

This process helps managers separate a temporary fluctuation from a structural issue. For example, if a KPI weakens in one period, compare it with another period using the same filters. Then compare across segments such as region, department, or salesperson. If the issue appears only in one slice, it may be local and manageable. If it appears across multiple slices and periods, it may indicate a broader business problem.

The dashboard-to-detail workflow supports practical questions such as:

- Why did **sales drop** this period?
- Which **region** is missing target?
- Where are **overdue items** concentrated?
- Which segment is pulling down overall performance?

What matters during evaluation is how quickly you can move between these layers. A mature reporting experience lets you switch from KPI cards to filtered reports and then to supporting records without losing context. If users have to manually rebuild filters, reselect time periods, or search again for the same slice, the analysis becomes slower and less reliable.

[SCREENSHOT: manager comparing a declining KPI with segmented drill-down results by region or team]

If you are evaluating whether the reporting area is practical for leadership use, look for fast context switching and clear evidence trails. Those two qualities usually determine whether dashboards are genuinely useful in review meetings or only attractive on first look.

Getting the most from dashboard KPIs during product evaluation

When you evaluate dashboard reporting in Sherkety ERP & Website Platform, do more than look at whether the KPI cards appear polished. The real test is whether the page supports quick, believable analysis when business questions change. Ask to see the same KPI recalculated live with different filters so you can judge how responsive the reporting page feels.

During a demo, focus on these checks:

- Change the **date range** and confirm the KPI updates immediately
- Switch from a broad view to a narrower business slice such as one company or team
- Open the **drill-down view** and verify that the selected filters stay in place
- Move from summary results to detailed entries without re-entering the same context

This last point is especially important. A dashboard is far more useful when drill-down actions preserve the selected scope from the KPI card. If a manager clicks a KPI for one period and one segment, the detailed report should open with that same period and segment already applied.

Also look for clear visual cues throughout the reporting flow, including:

- **Trend indicators** on KPI cards
- Visible **active filter labels**
- Obvious paths from the summary view to the detailed report
- Clear links from detailed results to the underlying records

These details reduce hesitation during analysis. A manager should not need to guess whether a card is showing this month or last quarter, or whether a drill-down result still reflects the selected branch.

The strongest reporting pages let managers move from a headline metric to actionable detail in only a few clicks. That is often the difference between a dashboard that looks impressive in a presentation and one that actually supports day-to-day decision-making.

The next step in this learning path is Sharing Reports and Supporting Decisions, which focuses on how reporting outputs help teams communicate findings and act on them.

Overview

This document focuses on how **dashboard KPI cards** and **drill-down analysis** work together on the reporting page in Sherkety ERP & Website Platform. It is written for readers who already understand the broader reporting area from Exploring Reporting and Analytics Capabilities and now want to read the page more confidently.

The core idea is simple: the reporting page is designed as a layered workflow. You begin with a summary, use filters to define the business scope, and then open detailed views only when a KPI needs explanation. That structure helps managers review performance quickly without getting lost in raw records too early.

The guide explains how to work with these visible page elements:

- **KPI cards** at the top of the reporting page
- **Charts** and report widgets in the main content area
- **Filter controls** such as date range and business selectors

- **Drill-down views** that open from a KPI or chart
- **Detailed rows and records** used for investigation

You will learn how to:

- Read a KPI card beyond its headline number
- Understand how filters change the meaning of a metric
- Narrow the dashboard to a specific company, team, region, or period
- Open a drill-down report and follow the analysis to supporting records
- Use the reporting flow to answer management questions with evidence

This guide stays focused on what users see and do on the reporting page. It does not repeat the broader introduction to reporting concepts, and it does not cover report sharing in depth. That next topic is handled in Sharing Reports and Supporting Decisions.

Prerequisites

Before this guide is useful, you should already be comfortable moving around Sherkety ERP & Website Platform and recognizing common page elements such as filters, charts, and navigation controls. You do not need technical knowledge, but you should know how to read a business dashboard and interact with the reporting screen.

You will get the most value from this guide if the following are already true:

- You have read Exploring Reporting and Analytics Capabilities
- You can identify the **reporting page** and its main sections
- You understand basic filter concepts such as choosing a **date range**
- You are familiar with visual cues like **status colors**, **trend arrows**, and highlighted metrics

Helpful background reading includes:

- Reading Charts Badges and Status Colors
- Understanding Visual Priority and Highlighted Metrics
- Selecting Single Dates and Date Ranges
- Understanding Loading Placeholders Empty States and Errors

This guide is especially relevant for:

- **Managers** reviewing performance at a glance
- **Team leads** comparing results across segments

- **Prospective buyers** evaluating reporting depth during a product demo
- **Decision-makers** who need to move from summary metrics to supporting detail quickly

If you are still learning the public-facing ERP module pages rather than the reporting workflow itself, you may want to review Using ERP System Landing Pages to Evaluate Offerings or Evaluating ERP Modules From Catalog to Detail Pages before returning to KPI and drill-down behavior.