

Working with Dashboards

Version: 16.0

intellicus

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For details, visit: <http://www.intellicus.com/acknowledgements.htm>

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1 Introduction

Dashboards display business information arranged on a single screen so that it can be viewed and monitored at a glance. With Intellicus' interactive dashboards, you can achieve drill-down, parameter-driven and personalized insights of your data. Dashboards help organizations visualize real-time business data, monitor overall performance and make informed business decisions.

You can design, edit and save dashboards if you have Write permissions on dashboards. Any user who has Read or Execute access rights can view the dashboards. These access rights on dashboards are provided by the super administrator.



Figure 1: A sample Dashboard in Intellicus

Key Features

Here are some of the key things you can do with Intellicus' dashboards:

- Drag and drop the reports and widgets (already created on the Dashboard Widget screen) on the dashboard. Reports include smart, ad hoc, standard and high speed. Widgets get automatically created when you drop a report on the dashboard.
- Link items in one widget to other widgets. When you click an item in a widget, the linked widget's data will get refreshed.
- Add Placeholders like Rich Text Editor, Slideshow and External URL onto the dashboard. The rich formatted text along with images and tables can be used to create a customized dashboard. You can add multiple widgets from multiple categories in the Slideshow placeholder. You can also insert an external URL to view the web site on your dashboard.
- Filter the report data by choosing parameters to see the changed visualization on dashboards.
- Intellicus' dashboards are available in two modes: Edit and View. We will discuss the various operations in these modes in detail later in this document.
- Select the dashboard you wish to view upon login by adding them to preferences.
- Save the dashboard for future reference or to share with other users.

2 Viewing Dashboards

If a default dashboard is specified in user dashboard preferences, then this dashboard opens up in view mode (To know more about Preferences, please refer “Managing dashboard’s default view” section on page 26). As an End User, you are able to see a default dashboard on logging into application as shown in Figure 2.

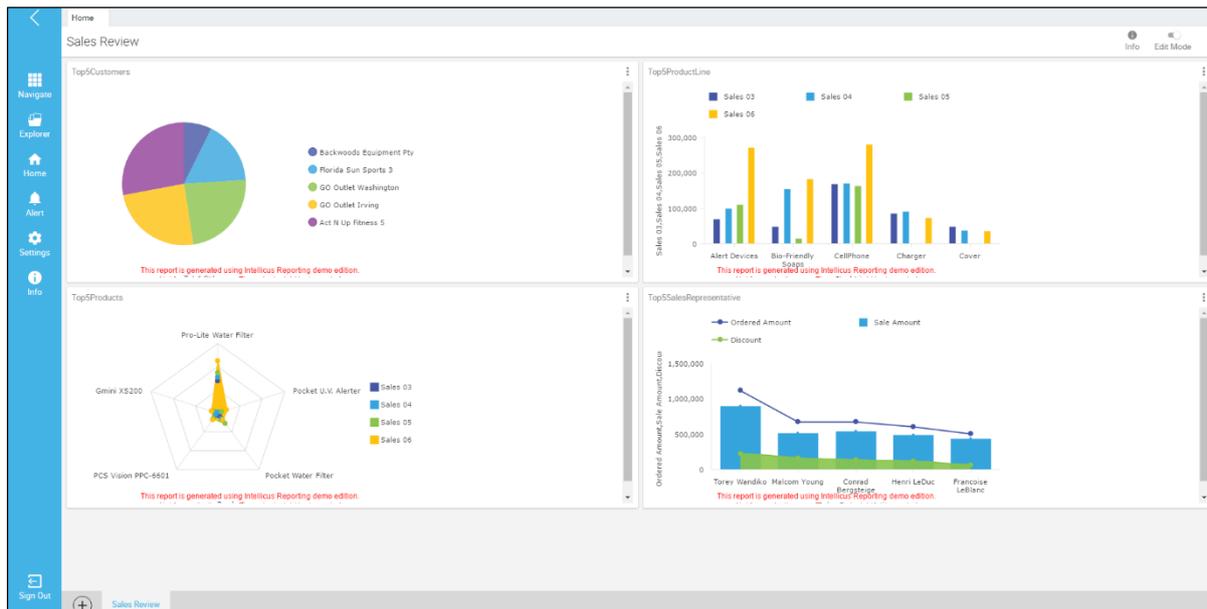


Figure 2: Viewing Dashboard

While viewing the dashboard, you can choose how the widgets should appear on the dashboard.

Under Dashboard Menu (View Mode) in upper right corner, you have the following options.

- You can click Unpin/ Pin Title to unpin/ pin the dashboard title.
- Clicking Revert restores the dashboard to its last saved state (also available on right-clicking the dashboard tab at the bottom of the screen). You will get a checkbox on the confirmation message to confirm reverting the changes.
- The Help option would enable you to view the online help regarding dashboard properties.

When you click the menu icon on the widget, you can perform the following:

- Click Maximize (or double-click the widget header) to maximize the widget. When you maximize a widget, it gets spread across the entire viewer area. Alternately, you can click Restore to reset the widget to its original state.
- You can click Unpin/ Pin Header to unpin/ pin the widget title.
- Click Reset to reset the widget to its last saved state.

In case you have a parameterized report on dashboard, you can change selection of values on the applied parameters while in the View mode. Refer the “Filtering data on a dashboard” section on page 21 to know about the various filtering options.

Click Info icon  on main menu at the top of the screen to view the Dashboard information. This can be set under Settings in the Edit Mode as mentioned on page 22.

At any time, click  to switch to the Edit Mode to design the dashboard. We will discuss designing dashboards in detail in the next chapter.

In addition to viewing information, you can click  at the bottom left of the screen to open a new dashboard to design from View Mode.

3 Designing Dashboards

Let us start designing a dashboard. You need Write permissions on dashboards to design. You can access dashboards from Navigate > Analytics > Dashboard. The screen that appears in Figure 3 enables you to create a new dashboard.

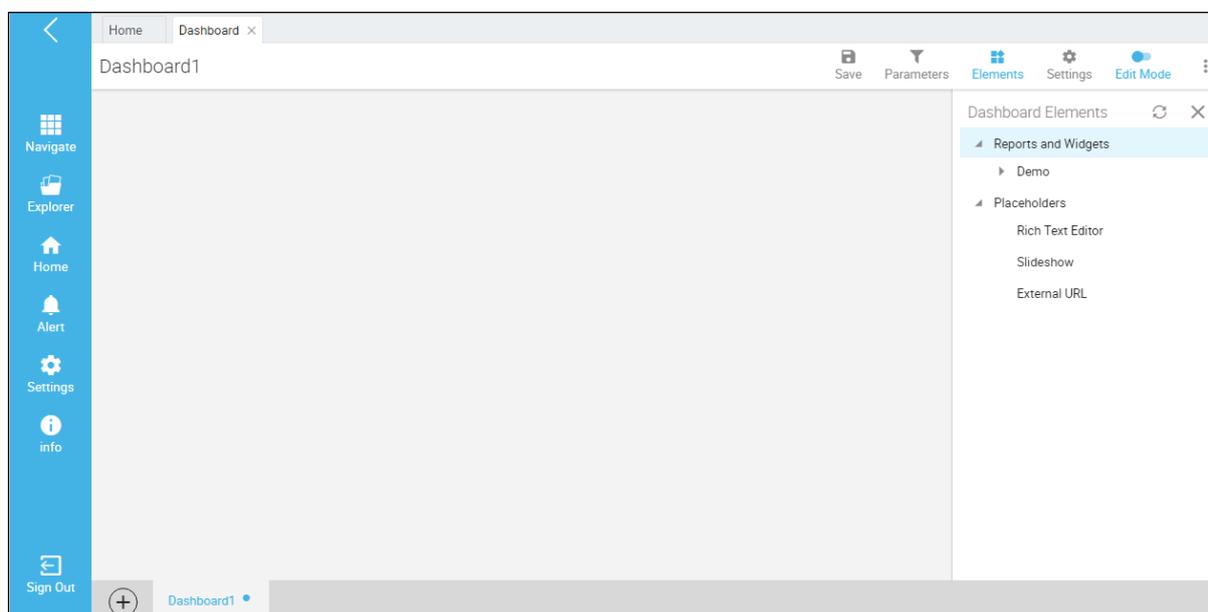


Figure 3: Designing Dashboard in Edit Mode

Adding a new dashboard

By default, a tab titled Dashboard1 opens up on the Dashboard. Next step is to add either reports or existing widgets on the dashboard.

Adding reports or dashboard-widgets on the dashboard

Under Elements  menu option, you can see the reports or existing widgets under categories. You can either drag and drop or double-click the report or widget onto the dashboard. A dashboard widget gets automatically created under the category (same as that of the report) when adding a report to the dashboard. You should have “Widget Designer” System Privileges to be able to design a widget on the dashboard.

The widgets appear with a  symbol in front of their names in Elements pane on the right panel. The report when added to the dashboard is shown in Figure 4.

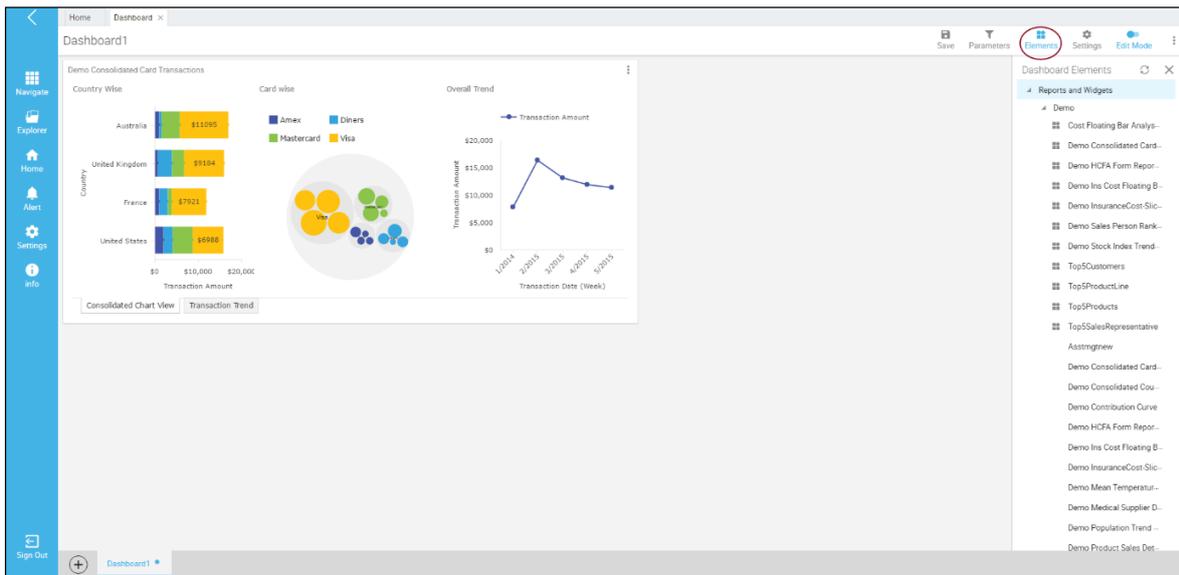


Figure 4: Adding Report on Dashboard

A Slideshow gets automatically created if you add a category onto the dashboard. We will discuss slideshows in detail later in this document (under the Slideshow section on page 19).

You can reposition and resize the widgets on the dashboard simply by dragging them. Double-clicking the widget header maximizes the widget so that you can better visualize the report or widget data.

Dashboard Widget Menu

Let us explore the actions that can be performed on a dashboard widget.

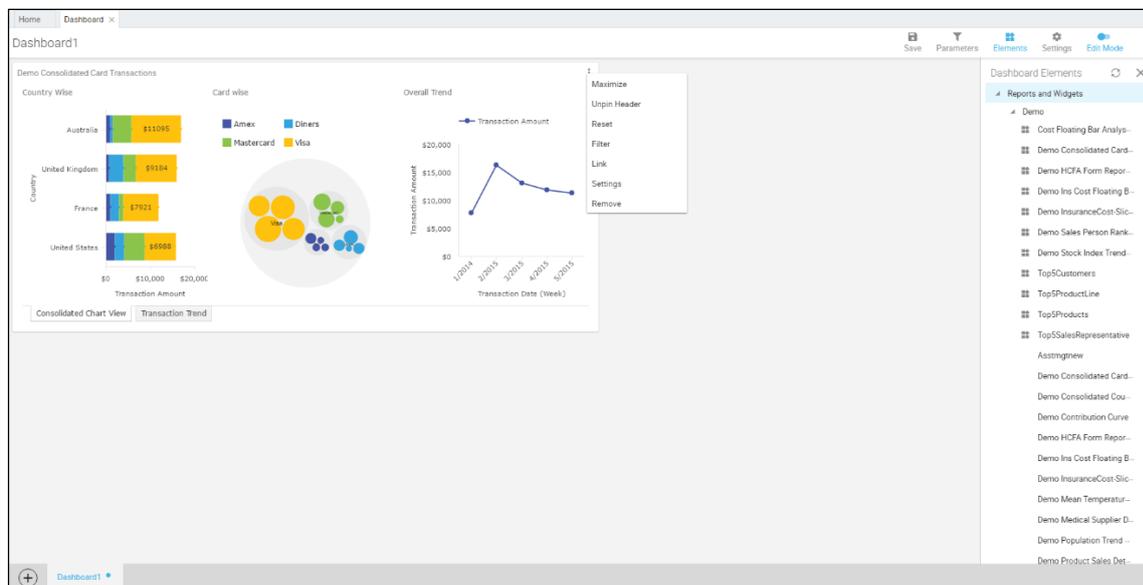


Figure 5: Dashboard Widget's Menu

Each widget's menu (under the ellipsis icon ) has various options that are explained below.

- Click Maximize (or double-click the widget header) to maximize the widget. When you maximize a widget, it gets spread across the entire screen. Alternately, you can click Restore to reset the widget to its original state.
- You can click Unpin/ Pin Header to unpin/ pin the widget title.
- Click Reset in case you wish to reset the widget to its last saved state after you have made changes to it.
- You can use the Filter option to provide the parameter values at run time in case the report needs user parameters.
- With the Link option, you can link one widget with another widget. This menu option will appear if report has a chart, grid or map component. When you click this button, a dialog box will open. On the dialog, select the series (under Items), and select the widget (under Widgets) to be opened when the selected series is clicked. Both the widgets need to be placed on the dashboard. You can add more links by clicking the plus sign. Place the widgets on the dashboard. When you click the item on one widget you would notice that the linked widget gets refreshed. Widget Linking is discussed in detail later in this document on page 11.
- You can specify the following options under Settings:
 - Name:** You can specify a name different from the default for your dashboard widget.
 - Report Name:** Select the report for the dashboard widget.
 - Auto Refresh:** If the report-data changes frequently, you may wish to refresh (regenerate) the report to view the latest report-data. Select this checkbox to automatically refresh the report.
 - Duration:** If Auto Refresh checkbox is checked, specify the time in seconds after which the report should be regenerated.
 - Description:** You can describe the widget if you wish to.

Settings options (In case an ad hoc/smart report is added on the dashboard):

Report Format: Select the format in which report should be displayed on the dashboard-widget. It could be HTML, JVista, iHTML or Smart format.

Viewer Toolbar: Using the Viewer toolbar, you can switch between different views like chart, grid etc. of smart report. In case of an ad hoc report, you have export, print, publish, email, upload and refresh report options on the Viewer toolbar. Select *Yes* to always show the toolbar, *No* to keep the toolbar in hidden state and *On Multipage* to show toolbar only if the report is a multi-page report.

Parameter Toolbar: The report selected for dashboard-widget may have parameters. Parameter value for such a report needs to be provided during dashboard-widget design. Select *Yes* if the user should provide values at runtime (when the report is actually executed) so that Input Parameter Form in collapsed state will be displayed on dashboard viewer to allow user to provide parameter values. Select *No* to provide parameter values during dashboard-widget design only. Select *Yes Expanded* so that the Input Parameter Form will be displayed in expanded format.

Ad hoc Toolbar: Dashboard Designers can display the Ad hoc toolbar on the widget containing smart or Ad hoc report. This facilitates the end user to change the parameters, sorting order or grouping etc. as per their need and see the effects on the dashboard immediately. Select *Yes* to always show the Ad hoc toolbar, *No* to keep the toolbar in hidden state and select *Yes Expanded* to show the Ad hoc toolbar in expanded format.

Ad hoc Toolbar Tabs: If the Ad hoc toolbar is set to *Yes*, you can select multiple tabs (using ctrl or shift key with mouse click) that you wish to see on the toolbar. Example, Fields, Filter, Group etc.

You can see the Report Options (under the ellipsis icon ) on the report if both the Viewer and Ad hoc Toolbars are set to *Yes*. To know more about the report options, please refer WorkingwithSmartView.pdf for smart reports or DesigningAdhocReports.pdf for ad hoc reports.

Instance Navigation: This is applicable when the pre-generated report placed on the dashboard was already run and saved multiple times. Click *Yes* to get a dropdown box to select one of the saved reports and view it. Click *No* to view report as per preference set in Instance Type.

Settings options (in case a High Speed report is added on the dashboard):

Mode: You can choose to display a High Speed report either in View or Edit mode.

Filter: Select whether to show or hide the filters applied to the High Speed report.

Drill Operations: Select enable/disable to allow/restrict user to perform drilling actions on the High Speed report.

Expand Operations: Select enable/disable to allow/restrict user perform expand or collapse actions on the High Speed report.

Selection Operations: You can enable this option to be able to select specific data on the High Speed report.

Change Cube: Choose the Enable option to allow user to change the cube object for the High Speed report.

Fields Selection: If enabled, user can add or remove fields to the Crosstab view of existing High Speed report.

Add/Remove Views: You can choose to enable or disable this option, to allow or restrict user to add and remove views to the High Speed report.

Change Visualizations: Select Enable to allow user to change the visualization type of the High Speed report.

Report Properties: Report Properties like the Report Name, Default View, etc. can be shown or hidden.

View Properties: Properties specific to a selected view can be shown or hidden using this option.

Save: To show or hide the option of saving the High Speed report on the dashboard.

- Clicking Remove would permanently remove the widget from the dashboard. In case of an auto-created widget, you can choose whether to delete widget permanently or not.

Widget Linking

Multiple widgets can be placed on a dashboard. You can link items in one widget to other widgets. When you click an item in a widget, the linked widget's data will get refreshed. Widgets should contain a grid, chart or map to link them. To link widgets based on same query object, you need to select the Link option from the Widget menu. Select the item in one widget to link it to the other widget. Let us understand widget linking with the below example.

Example: Widget one is a map report that shows sales figures for various US states. Widget two is a chart report with Target Sales (y-axis) and Sales Person (x-axis). Widget three is a report with grid having fields: Sales Person name, Target Sales value, Sales Achieved etc. The widget one is linked with widget two and widget two is linked to widget three. When you click on state name in widget one, all the sales persons under the selected state are displayed in widget two. When you click on a sales person's name in widget two, the widget three displays the detailed report of selected sales person for the already selected state (in widget one).

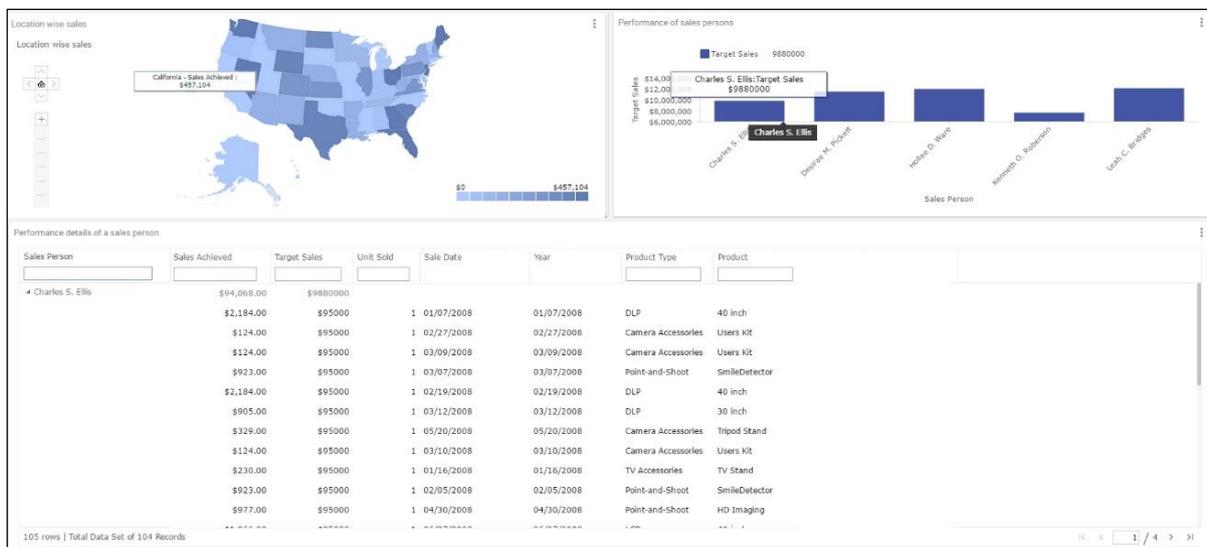


Figure 6: Widget Linking

Adding placeholders on the dashboard

The user should have “Widget Designer” System Privileges to be able to add a placeholder on the dashboard. You can add your customized text using Rich Text Editor, multiple widgets in a Slideshow or an External URL from Placeholders under the Dashboard Elements by either double-clicking or dragging them onto the dashboard.

Rich Text Editor

You can drag and drop or double-click the Rich Text Editor under Dashboard Elements > Placeholders to add to the dashboard. Intellicus dashboard allows you to enhance your dashboard by adding rich formatted text, along with images, URL links and HTML content to enrich your dashboard with relevant contextual information and styling. You can also use the HTML code to provide the formatted text.

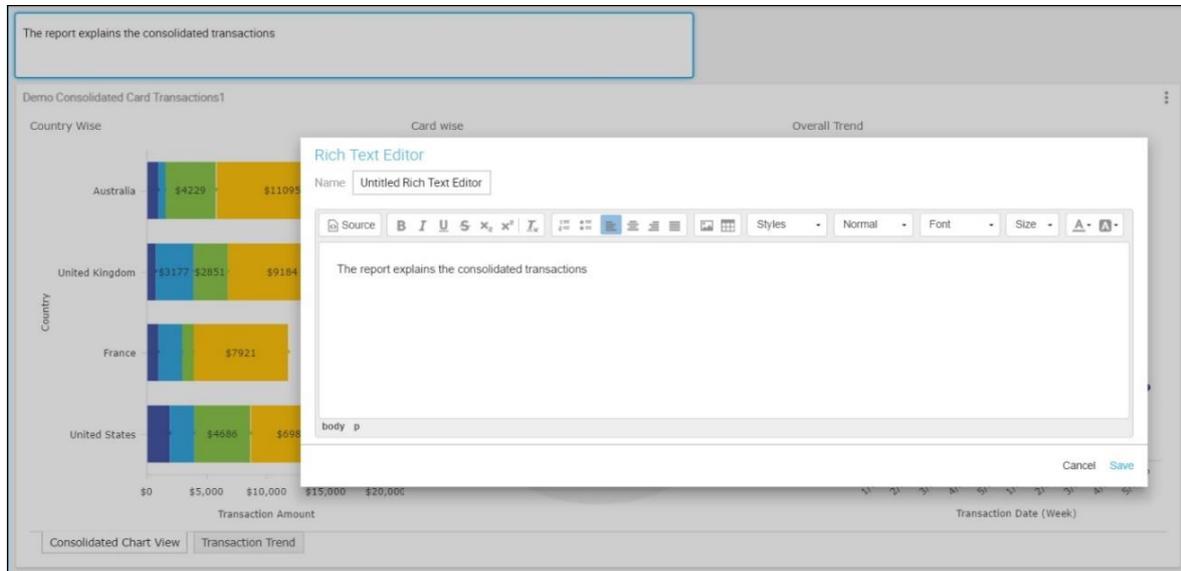
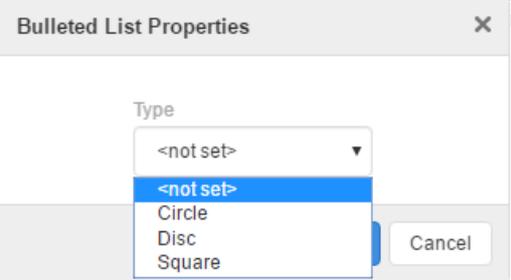
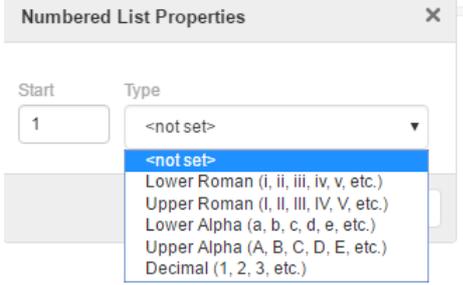


Figure 7: Rich Text Editor

Below is an overview of all features available in the Rich Text Editor:

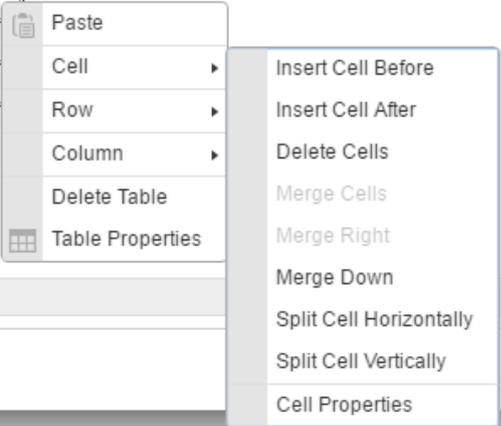
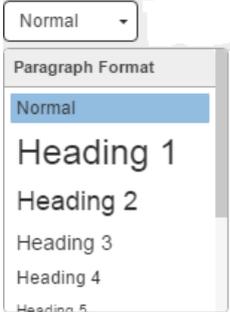
Toolbar Button	Description
 Source	View or edit the source code of the document. Rich Text Editor is a WYSIWYG editor that produces clean, standards-compliant HTML code. All you need to do is enter your text in the editing area and format it with a few simple clicks of the toolbar buttons. At any time you can check the

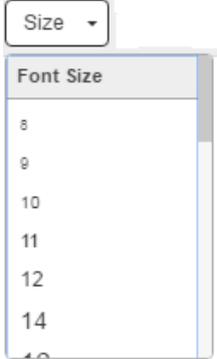
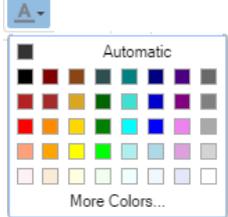
	HTML source code of your document using the Source button. The text in the editing area would then contain all the relevant HTML tags and attributes.
B I U S	Apply bold, <i>italic</i> , <u>underline</u> or strike-through formatting to the text.
x_2 x^2	Apply superscript or subscript formatting to the text.
I _x	Remove the formatting of the selected text. All text styling will be removed and the text will be displayed in the default font.
<ol style="list-style-type: none"> 1= 2= <ul style="list-style-type: none"> •= •= 	<p>Create a numbered or bulleted list. In Rich Text Editor, you can customize the appearance of the bulleted list/numbered list and modify the list marker. To change the list style, open the list context menu by clicking the right mouse button on a list item or using the <i>Menu/Application</i> key on your keyboard, and choose the Bulleted/Numbered List Properties menu option.</p> <p>The type of the bulleted list can be circle, disc or square.</p> 

	<p>You can choose the starting value of the numbered list and the type from the below pop-up:</p>  <p>If you want to remove list formatting, leaving the text of the list items intact, select the list in the document and press  or  button again on the toolbar. The list markers and indentation will be removed and each of the former list items will become a paragraph.</p>
	<p>Set text alignment (left, centered, right or justified).</p>
	<p>Insert an image into the document. Rich Text Editor allows you to add images to your documents in an easy and intuitive way.</p> <p>When you click the Image button on the toolbar, the Image Properties dialog window opens up to let you set configuration options that define image source, its size, display properties, or other advanced properties.</p> <p>The Image Properties dialog window includes three tabs that group image options:</p> <ul style="list-style-type: none"> Image Info Link Advanced <p>The Image Info tab is the tab that allows you to set the image URL and configure the way it will appear in the document.</p>

	<p>If the image is too big, you can alter its dimensions by entering new values into the Width and Height fields. By default the image ratio is locked due to the Lock Ratio  button. This means that when you change one of the size values (width or height), the other one will be adjusted automatically.</p> <p>If you want to freely modify both dimensions, click the  button to unlock the ratio. The button will now change to  and modification of one dimension will not automatically cause the other one to be adjusted. To lock the image ratio again, click the  button once more.</p> <p>You can easily return to original image size by pressing the Reset Size  button. This will reset the image size; the original width and height will then appear in appropriate text boxes.</p> <p>The Link tab lets you assign a link to an image inserted into the document, effectively converting the image into a clickable link. The link can point to any kind of object available in the Internet, like a simple URL address, a PDF document, or an online video.</p> <p>The Advanced tab lets you configure additional image options such as assign it an ID, a class, a longer description, a tooltip, or CSS style properties. It is meant for advanced users with knowledge of HTML as well as CSS, and gives nearly endless possibilities as far as the presentation of the image is concerned.</p>
	<p>Create a table with the defined number of columns and rows.</p> <p>To create a table in Rich Text Editor, press the Table button on the toolbar. The Table Properties dialog window that will open lets you</p>

	<p>set configuration options that define table size, its display properties, or other advanced properties.</p> <p>The Table Properties dialog window includes two tabs that group table options:</p> <p>Table Properties</p> <p>Advanced</p> <p>Once inserted into the document, the table can be modified. To edit the table, either double-click it, or open the table context menu by clicking it with the right mouse button or using the <i>Menu/Application</i> key on your keyboard.</p> <p>To delete the whole table and its contents, use the Delete Table option.</p> <p>When you choose the Table Properties option, the dialog window of the same name will appear. It allows you to change the configuration options that were set when the table was created, except the number of rows and columns which are grayed out.</p> <p>Additionally the table context menu lets you modify the rows, columns or particular table cells. This method makes it possible to insert new rows, columns or cells in specified locations as well as merge and split cells.</p>
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	<p>Table cells in Rich Text Editor can be further customized, creating a unique look and feel. Various configuration options can be set in the Cell Properties dialog window that is opened from the table cell context menu.</p> 
	<p>Apply pre-defined block and inline styles to the text.</p>
	<p>Apply pre-defined formatting options to your rich text.</p>

	<p>Change the typeface (font) of the text.</p>
	<p>Change the font size of the text.</p>
	<p>Change the color of the text.</p>
	<p>Change the background color of the text.</p>

Below options are available on the Slideshow menu:

- Click Maximize (or double-click the widget header) to maximize the slideshow area to fit the entire screen. Alternately, you can click Restore to reset the slideshow area to its original state.
- You can click Unpin/ Pin Header to unpin/ pin the slideshow title.
- Under Settings, you can specify a name for the slideshow and also the Auto Rotation time (in seconds) to rotate the widgets on the slider.
- Click Edit Slideshow to go back to the slideshow view from where you can add widgets/categories and also remove/reorder them.
- The Remove option would completely remove the slideshow from the dashboard.

External URL

You can drag and drop or double-click the External URL from Dashboard Elements > Placeholders to place it on the dashboard. This placeholder enables you to save a widget with a unique name for an external URL that would open up on the dashboard. Under Duration, specify time interval upon which the data would be fetched from the external server (in seconds) in case Auto Refresh option is checked.

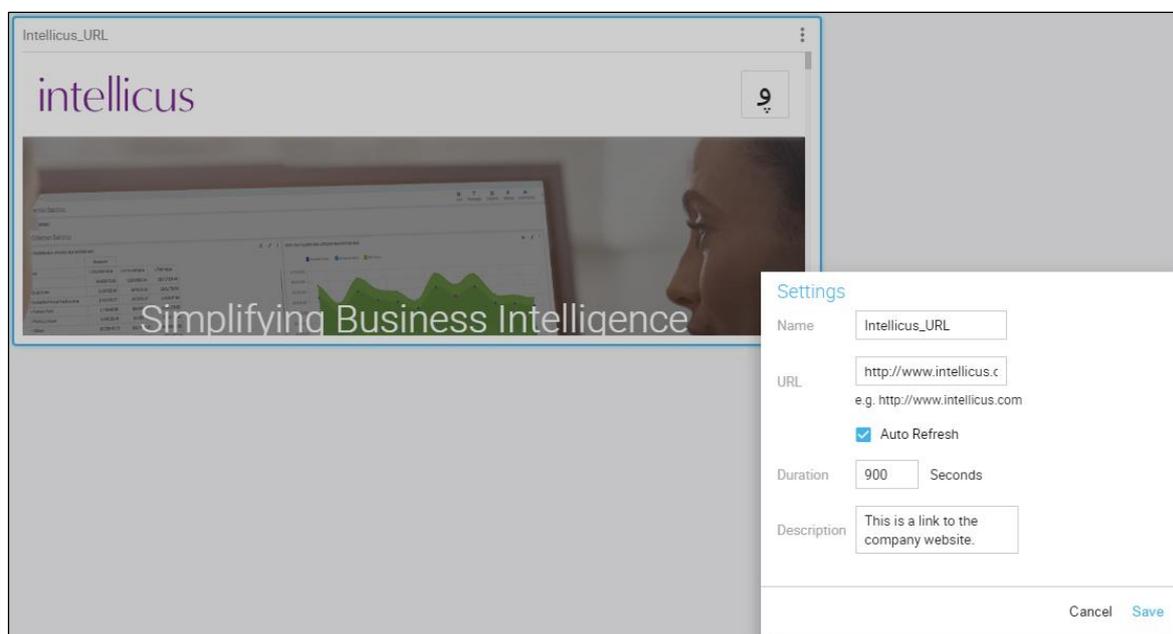


Figure 10: External URL

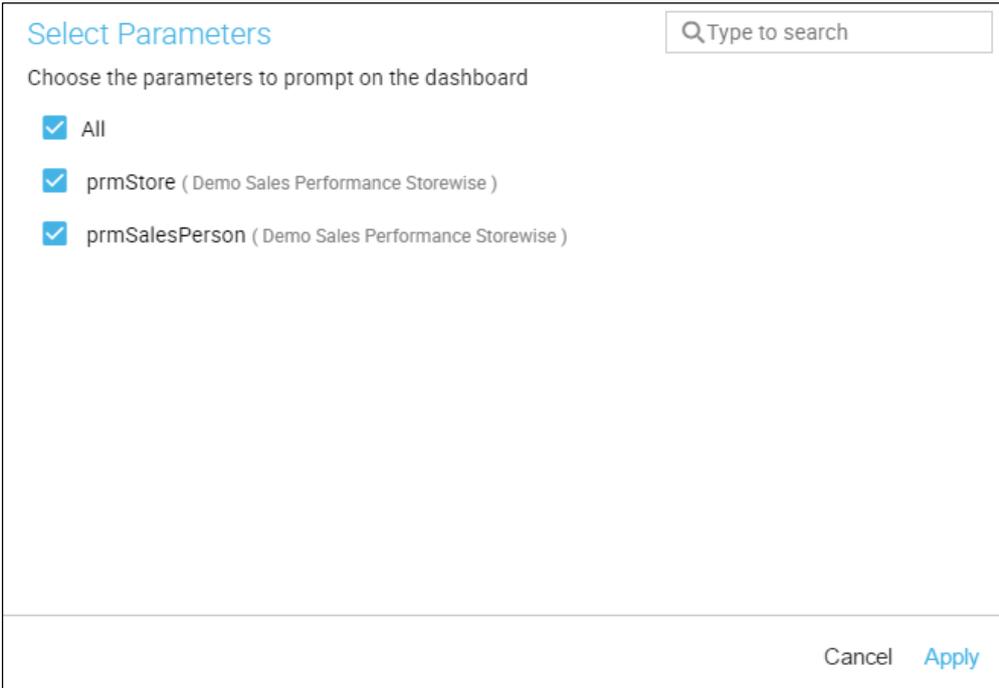
Below options are available on the External URL menu:

- Click Maximize (or double-click the widget header) to maximize the widget area to fit the entire screen. Alternately, you can click Restore to reset the widget area to its original state.
- You can click Unpin/ Pin Header to unpin/ pin the widget title.
- Click Reset to reset the widget to its last saved state.
- Under Settings, you can specify a name for the widget, an external web site URL to open in that widget and also the Duration in case Auto Refresh option is checked.
- Clicking the Remove option would completely remove the External URL placeholder from the dashboard.

Filtering data on a dashboard

Dashboard filters allow you to narrow the scope of one or more reports on a single dashboard. By selecting values in the filter, you can change the values displayed in the report without changing the report definitions.

In case you have a parameterized report (that needs user inputs at run time), you can filter the report data by choosing parameters to see the changed visualization. Click Parameters icon  to select parameter(s) you want to prompt on the dashboard. Click the Apply button after selecting parameters as shown in Figure 11.



The screenshot shows a dialog box titled "Select Parameters". At the top right, there is a search bar with the placeholder text "Type to search". Below the search bar, the text "Choose the parameters to prompt on the dashboard" is displayed. There are three checked checkboxes: "All", "prmStore (Demo Sales Performance Storewise)", and "prmSalesPerson (Demo Sales Performance Storewise)". At the bottom right, there are "Cancel" and "Apply" buttons.

Figure 11: Select Parameters

The parameters pane that appears on the dashboard has the below options:

- **Reset:** Click Reset in case you wish to reset the parameter values to its last saved state after you have made changes to it.
- **Pin to top:** You can pin the parameters pane to the top of dashboard (Option type parameters cannot be pinned to top).
- **Pin to right/left:** You can pin the parameters pane to the right/left of dashboard.
- **Dropdown View:** In case of Dropdown parameters that are not searchable, you can have 3 views (in case the parameters pane is pinned to either right or left):
 - List View:* select from the list of all the values on the parameters pane. In case of multi-select values, you can select multiple values by pressing the ctrl or shift key.
 - Dropdown View:* In case of multi-select values, you can select multiple values from the dropdown list using checkbox.

Expanded Dropdown View: In case of multi-select values shown in the expanded view, you can select multiple values from the list using checkbox.

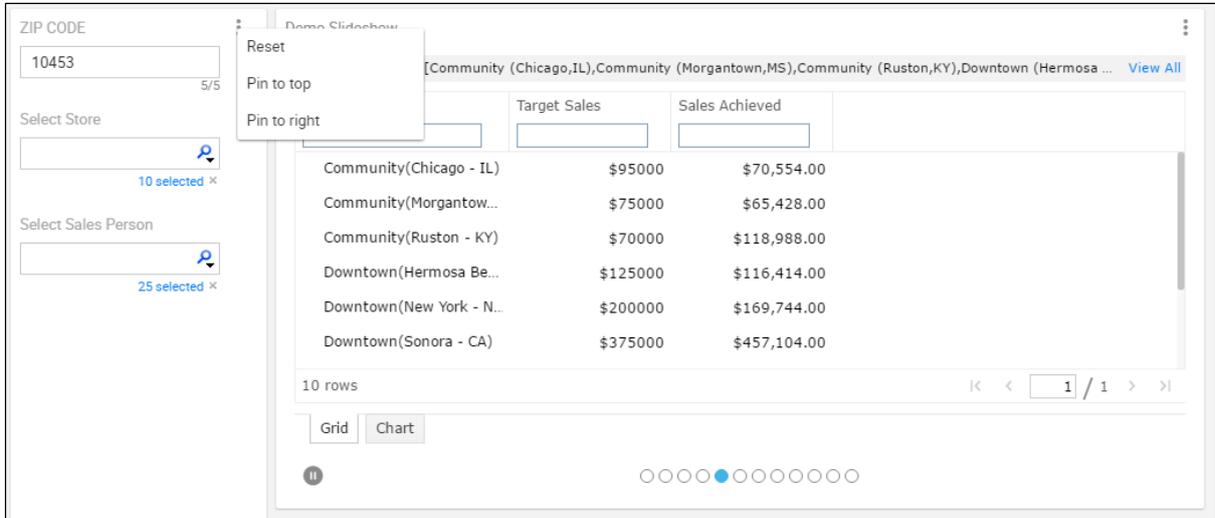


Figure 12: Filtering Options

You can also select the Filter option from Widget Menu to run report with the specified parameters.

Dashboard Settings

While designing, you can set the properties that you wish to apply to the dashboard. You can edit the dashboard name and description along with the following properties when you click the Settings icon .

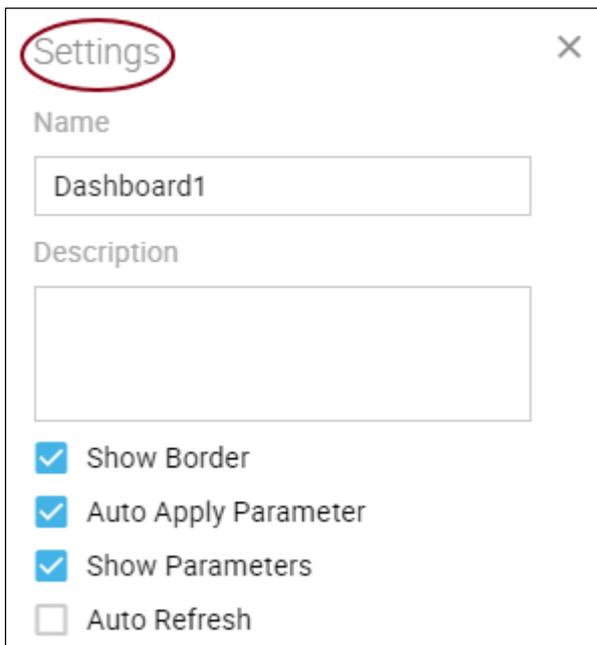


Figure 13: Dashboard Settings

Other options available under Settings include:

- **Show Border:** Select Show Border to enable whether you wish to see the widgets on the dashboard with borders.
- **Auto Apply Parameter:** Check this option to automatically apply parameters on selecting parameter values. You need not explicitly click the Apply button to apply multiple filter values.
- **Show Parameters:** Check/uncheck Show Parameters to show/hide the parameter pane on the dashboard.
- **Auto Refresh:** To auto-refresh a dashboard at a regular interval, check the Auto Refresh check-box and specify time in seconds. This will automatically refresh the dashboard after the set number of seconds.

Dashboard Menu

After you have designed the dashboard, there are various operations that can be performed on it. The options available under the Dashboard Menu  are discussed below.

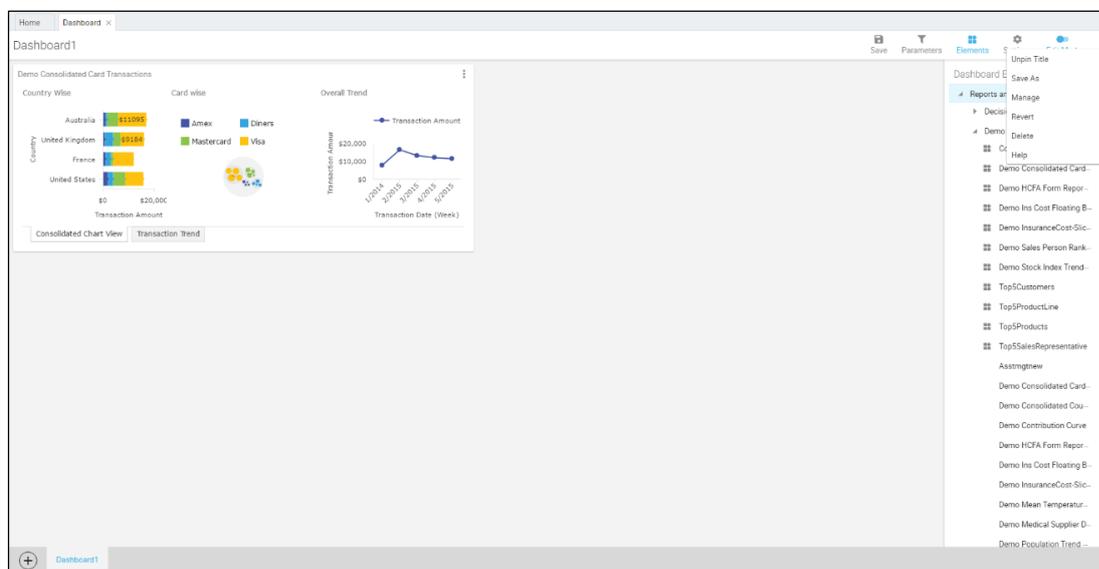


Figure 14: Dashboard Menu options

- You can click Unpin/ Pin Title to unpin/ pin the dashboard title.
- Click Save As to save the dashboard with a unique name under a selected category. You can also save an already saved dashboard with a new name.
- From the dashboards you designed or the dashboards available to you, you can select dashboards that you wish to view. The Manage option enables you to add/remove the dashboards (under categories) to Preferences by pinning/unpinning them. This is discussed more under the section titled 'Managing Dashboard's Default View'.
- Clicking Revert restores the dashboard to its last saved state (also available on right-clicking the dashboard tab at the bottom of the screen).
- You can click Delete to remove the saved dashboard on clicking Apply on the confirmation pop-up.
- The Help option would enable you to view the online help regarding dashboard properties.

Click  button towards the bottom-left of the screen to add a new dashboard tab if required.

Refreshing an existing dashboard

To fetch the updated data for your dashboard, you can refresh the dashboard. Clicking Refresh from the Dashboard menu refreshes widget data under dashboard as it reruns query to fetch data from server. This is a configurable property set by the administrator (under Navigate > Administration > Configure > Portal Menu, set 'Refresh Dashboard' as "true" in Portal > Analytics > Dashboard).

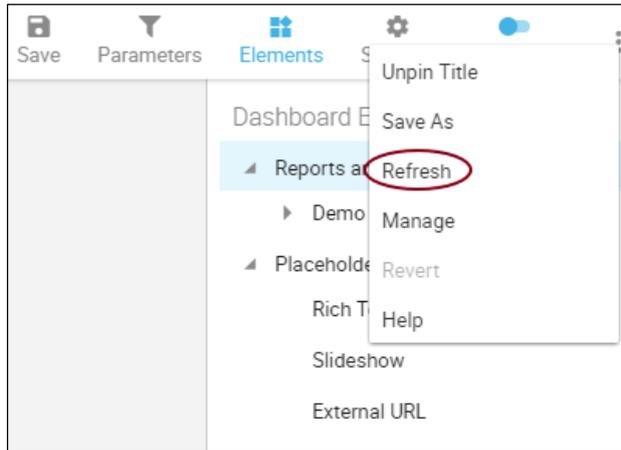


Figure 15: Refresh Dashboard from menu

You can also refresh the dashboard on right-clicking the dashboard tab at the bottom of the screen.

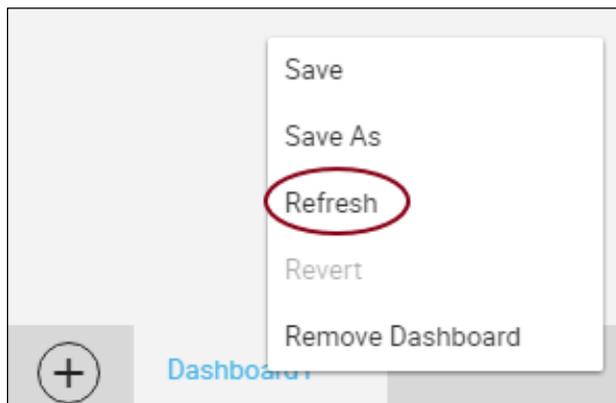


Figure 16: Refresh Dashboard from dashboard tab

Saving a dashboard

After you have designed the dashboard, you may want to save it for future use or share it across with other users. To save the dashboard with a unique name, click the Save As button under the dashboard menu. When you Save As an existing dashboard, you can save that dashboard with a new name.

Click Save (available on the Dashboard title pane) to save changes to an existing dashboard or save a new dashboard with a name.

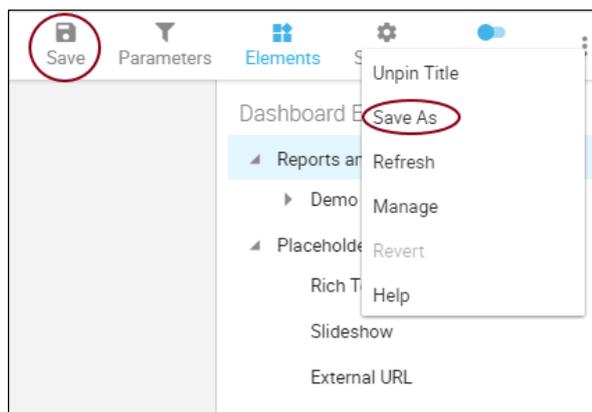


Figure 17: Save Dashboard from menu

Along with the Name, Intellicus also saves Owner (the organization and user ID who created the dashboard) and Last Modified Date as shown under the Detailed View on the Save Dashboard pop-up window in Figure 18.

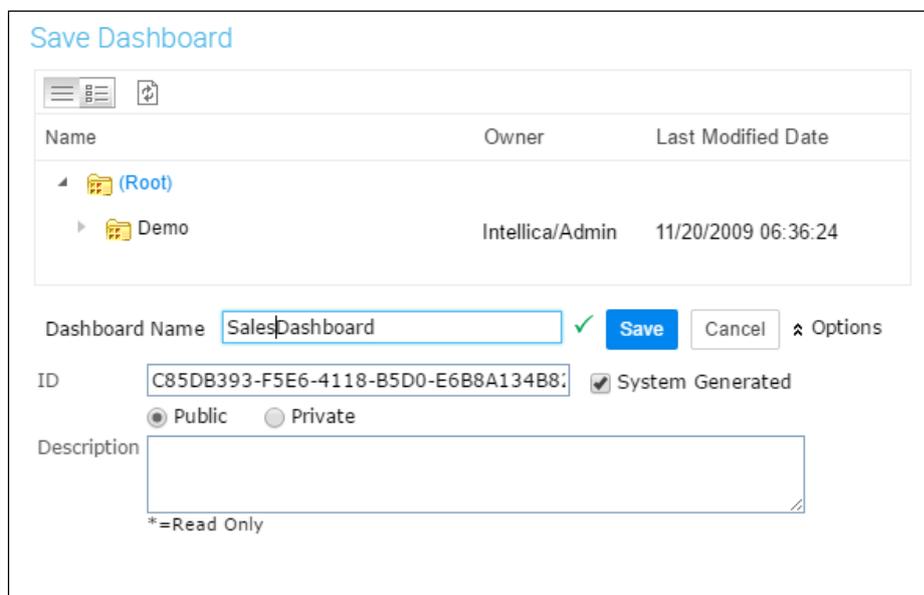


Figure 18: Save Dashboard Options

Click Options to see the ID and Description options. Each dashboard has a unique ID. By default it is system generated. To provide self-defined unique ID, uncheck System Generated checkbox and specify the ID.

Select Public to make this dashboard available to all the users. Select Private to make sure only you are able to access this dashboard. If you are a super administrator, you can set a dashboard as public, which will be available to all users of all organizations. If you are an administrator, a public dashboard will be

available to users of your organization. If you are an end-user having access privileges required to create a dashboard, you can create only private dashboards.

In Description, specify information about the dashboard.

Save options are also available on right-clicking the dashboard tab located at the bottom of the dashboard.

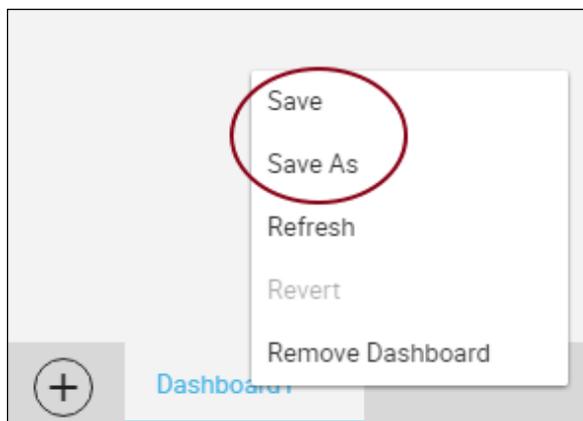


Figure 19: Save Dashboard from dashboard tab

Managing dashboard's default view

Whenever a dashboard is added to Preferences, you are able to view it at the time of logging into Intellicus. The Manage option on the main menu enables you to add/remove the dashboards (under categories) to Preferences by pinning/unpinning them. Click Add to Preferences  to add the chosen dashboard to Preferences.

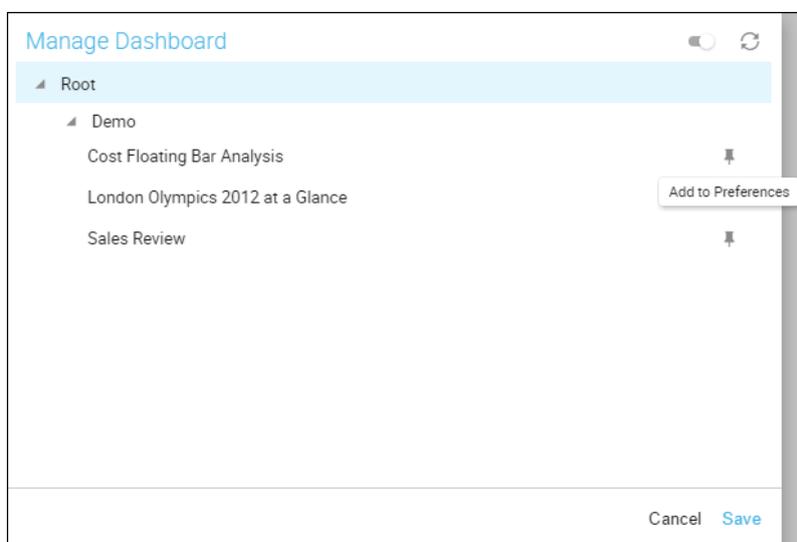


Figure 20: Manage Dashboard

Clicking Switch to Dashboard Preferences  would list the pinned dashboards (as shown in Figure 21). You can remove (by clicking ) or reorder (using ) these pinned dashboards on Dashboard Preferences. Click Save to save your preferences.

The Reload button  fetches the refreshed list of dashboards from the server. You can quickly search the dashboard from the list in the Search box.

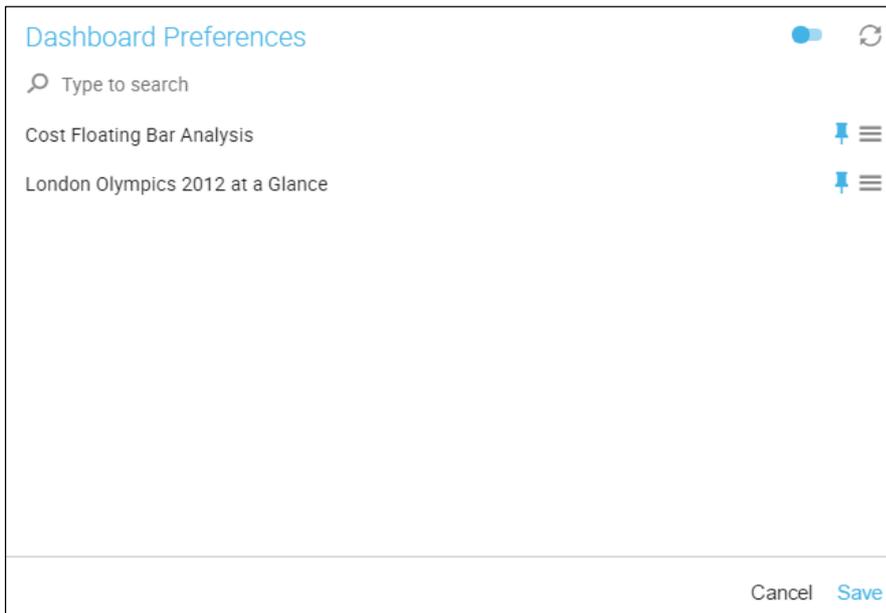


Figure 21: Dashboard Preferences

If you do not wish to see the default dashboard, you have the option of Remove Dashboard on right clicking the dashboard tab. This lets you remove the dashboard from Dashboard Preferences.

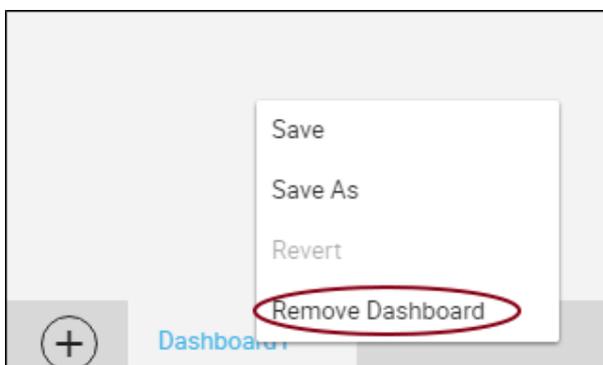


Figure 22: Remove Dashboard from Preferences

Opening an existing dashboard

The dashboards pinned under Dashboard Preferences get displayed when you login into Intellicus.

You can also open a dashboard from the Explorer. Click Explorer > select category and select Dashboard under Object Type to get a list of all dashboards under the selected category. Double clicking the dashboard name would open up the dashboard.

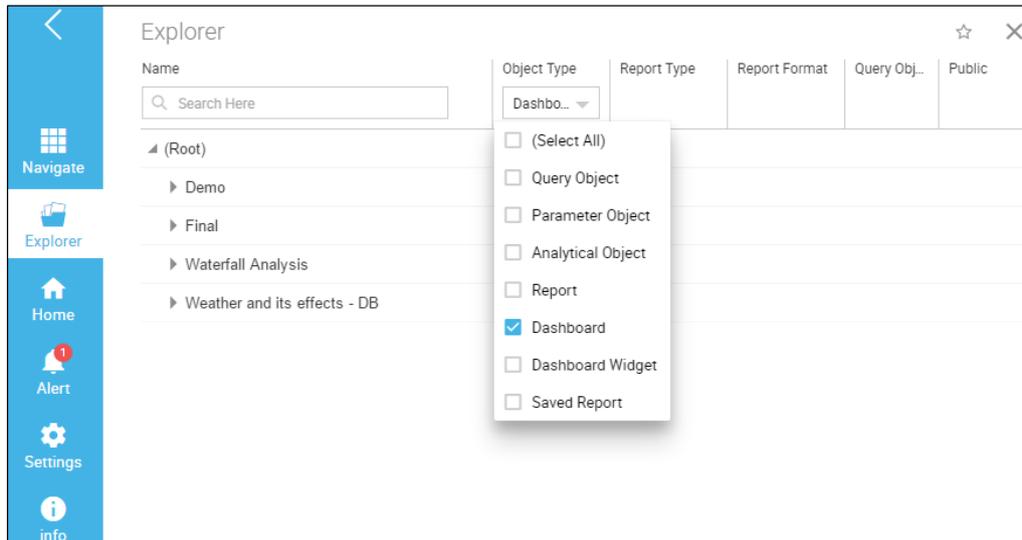


Figure 23: Opening Dashboard from Explorer

There are more actions that can be performed on right clicking the dashboard from Explorer.

If you right-click only one dashboard, you can do the following operations:

- View Dashboard: Opens up the selected dashboard to view and edit
- Create Dashboard: Opens a new dashboard to design
- Copy/ Cut Dashboard: To copy or cut the selected dashboard and paste in a new or existing folder
- Add to Favorites: Adds the selected dashboard to favorites
- Delete: Deletes the selected dashboard

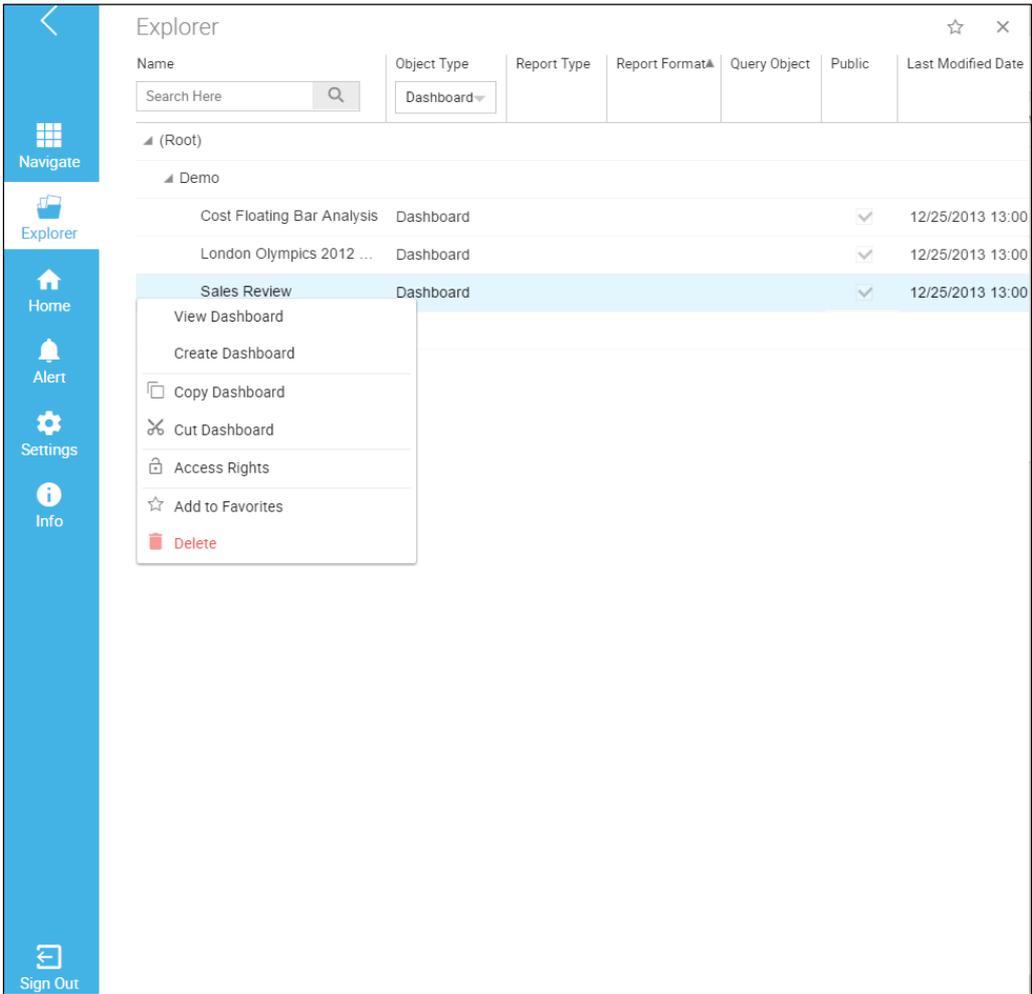


Figure 24: Dashboards' Operations from Explorer

You can perform copy, cut and delete operations when you right-click multiple dashboards at a time.