



# Intellicus Dashboards

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Intellicus Web-based Reporting Suite

-  Enterprise
-  Professional
-  Smart Developer
-  Smart Viewer

**intellicus**   
Enterprise Reporting  
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## **Acknowledgements**

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

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

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## Introduction

In Intellicus, dashboard is a special screen that keeps you updated with the latest information. For example, if you place a report on the dashboard and instruct Intellicus to refresh the report every 15 minutes, Intellicus will show you the report auto-refreshed every 15 minutes.

This completely eliminates the need to bring in report list under a category and then clicking run or quick run button at every 15 minutes interval. Intellicus does it for you.

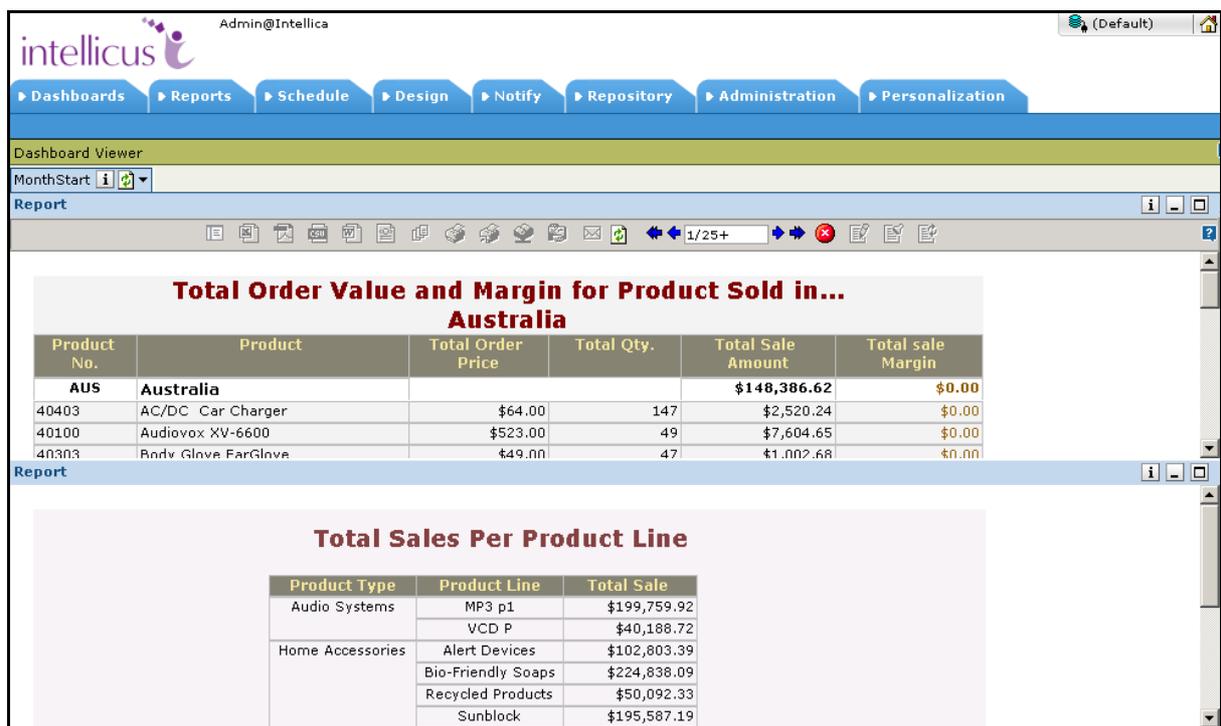


Figure 1: Dashboard

Intellicus supports multiple dashboards. You can create multiple-dashboards and set your preferences for viewing the dashboard or keeping it saved for later use. Each of these dashboards may have multiple items.

### What can you place on a dashboard?

You can place the following information on dashboard:

- **Reports:** Reports designed and uploaded in Intellicus. This also includes the published reports.
- **Use Cases:** These are functionalities available in Intellicus. By placing use cases on dashboard, you can access a use case without leaving t Introduction

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## Introduction

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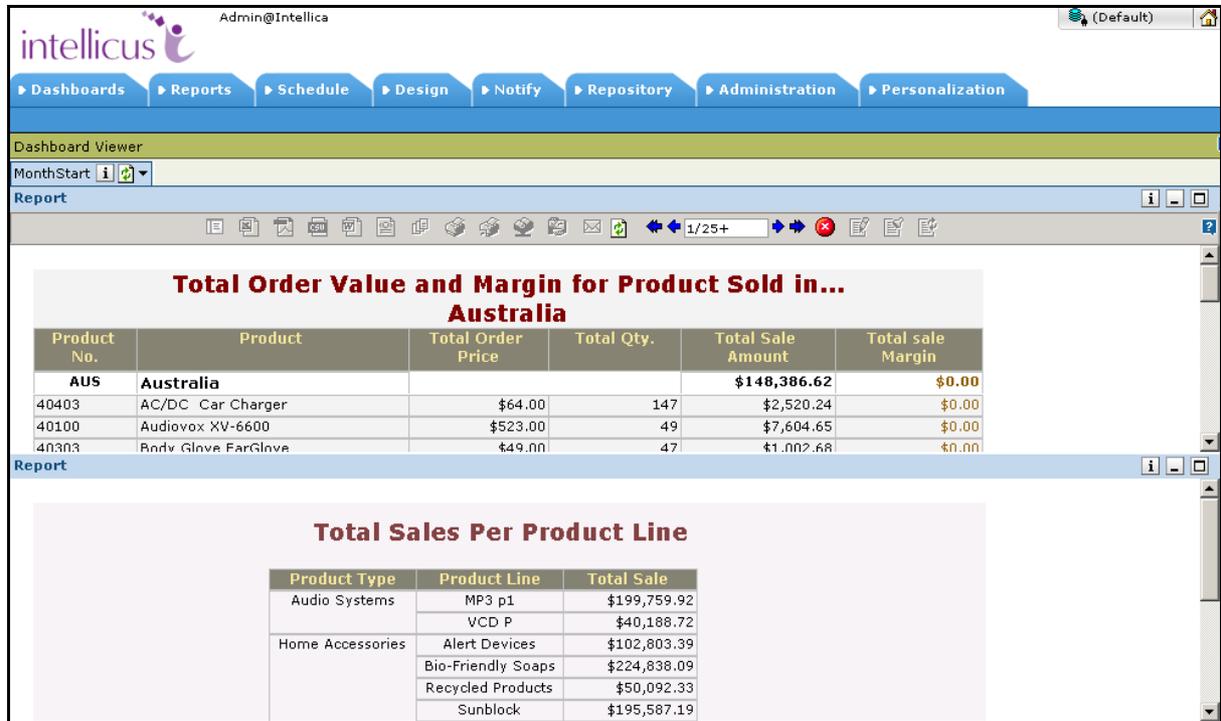


Figure 2: Dashboard

Intellicus supports multiple dashboards. You can create multiple-dashboards and set your preferences for viewing the dashboard or keeping it saved for later use. Each of these dashboards may have multiple items.

## What can you place on a dashboard?

You can place the following information on dashboard:

- **Reports:** Reports designed and uploaded in Intellicus. This also includes the published reports.
- **Use Cases:** These are functionalities available in Intellicus. By placing use cases on dashboard, you can access a use case without leaving the dashboard page.
- **External Links:** Any URL that you want onscreen while you are in Intellicus dashboard.

## Dashboards: Design, view and availability

## Introduction

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You can design dashboards if you are an end-user, administrator or a super administrator.

- **End user:** Can design and use dashboards privately. Cannot make the dashboards available to other users.
- **Administrator:** Can design and use dashboards privately as well make them available to users of his/her organization (public dashboards).
- **Super Administrator:** Can design and use dashboards privately as well make them available to all Intellicus-users.



**Important:** Facility of being able to provide dashboard view access rights to selected users is available in Intellicus running under Corporate license.

## Dashboard Examples

Here are examples of dashboards:

- Production report (previous date), Production Planning details (today), Weekly production (current week). This dashboard will give you three sets of production related information each time you start Intellicus.
- Sales report.

## Designing a dashboard

As an Intellicus-user, you can design and place multiple-dashboards on-screen. Each of the dashboards may have multiple items. Dashboards are designed using the Dashboard designer screen.

### The dashboard designer screen

Dashboard designer screen has many items that are to be set for a dashboard.

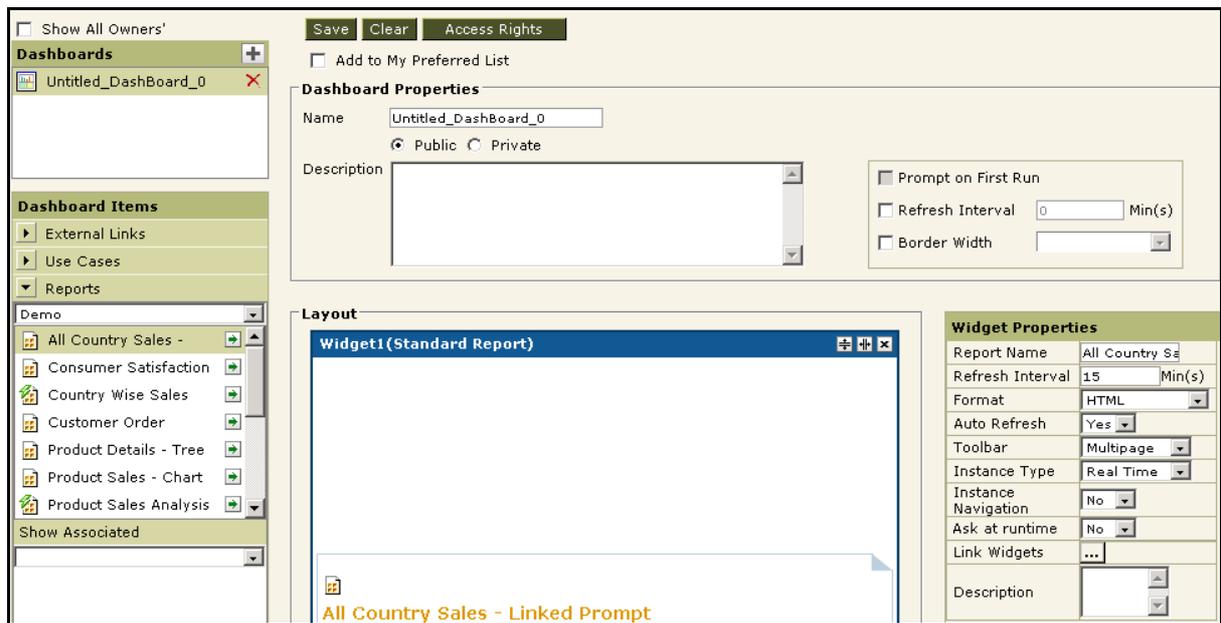


Figure 3: Designing a Dashboard

### Show All Owners' checkbox and Dashboard List

Dashboard list will have dashboards based on the user who logs in and selection status of Show All Owners' checkbox.

- **End user:** Show All Owners' checkbox is hidden for End-users. The list contains self-created dashboards. Dashboards created by Administrator as well as Super administrator (for which administrator has given access rights to view) are also listed.
- **Administrator:** When Show All Owners' checkbox is clear, the list contains self created dashboards and dashboards created by other Administrator user(s) as well as Super administrator (for which respective user has given access rights to view). When Show All Owners' checkbox is checked, the list contains self created dashboards and dashboards created by other Administrator user(s) as well as Super administrator (for which respective

## Designing a dashboard

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user has given access rights to view) and all the dashboard created by end users of his/her organization.

- **Super Administrator:** When Show All Owners' checkbox is clear, list contains self created dashboards and all the public dashboards (dashboards created by all the administrators). When Show All Owners' checkbox is checked, the list contains self-created dashboards, all the public dashboards (dashboards created by all the administrators) as well as private dashboards.

### Other items on the page

- **Dashboard List:** List of dashboards created.
- **Dashboard Items:** Reports, Use cases and External links are listed here. To put any of these items on dashboard, you will drag them from here. Alternatively, select the item and click . The selected item will be placed in the empty widget.
- **Dashboard Properties:** This includes information that is common for the dashboard being created / modified.
- **Layout:** Items placed on this area will be displayed on your dashboard viewer.
- **Widget Properties:** A layout may have one or multiple areas known as Widgets. Various dashboard items are placed on widgets. A widget may have properties based on the type of information placed on a widget. For example, parameters for a report, URL for an external link, etc.

## General steps of creating a dashboard

Here are the general steps of creating a dashboard.

1. Add an empty dashboard.
2. Specify dashboard properties. (Optional step).
3. Place items on dashboard.
4. For each item (widget) placed, specify widget properties. (Optional Step).
5. Save the work.

### Access Rights to view a Dashboard

This feature is available only to administrators and super administrators. To provide access rights for selected dashboard,



Figure 4: Access rights to view a dashboard

6. Select the dashboard and click the **Access Rights** button.
7. Select organization name to provide rights to all the users within that organization.
8. Select checkbox to provide rights to respective user / role.
9. Click the **Set** button to save the changes and close the dialog box.

Click the **Reset** button to get back the preferences that were set at the time of opening the dialog box.

### Adding an empty dashboard

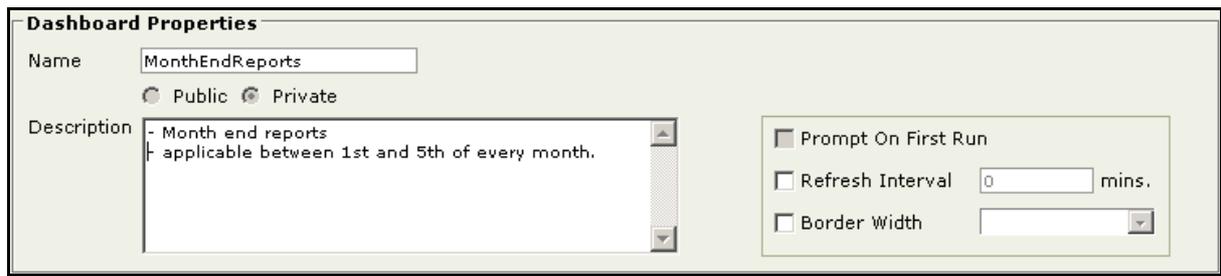
Dashboards are created on **Dashboard Designer** page. To get this page, from the menu-pad, click **Dashboard > Design**.

1. Click  available on top right of Dashboard list. A dashboard with empty layout will open up.
2. In **Name**, specify a unique name to identify the dashboard.
3. Specify dashboard properties. Detail is provided after these steps.
4. Click the **Save** button.
5. To place this dashboard in the list of selected dashboards, click **Add to My Preferred List** checkbox.

Click the **Clear** button to clear selected dashboard. It clears:

- Layout area
- Input parameters if any
- Widget properties

## Dashboard Properties



**Dashboard Properties**

Name:

Public  Private

Description:

Prompt On First Run

Refresh Interval:  mins.

Border Width:

Figure 5: Specifying Dashboard properties

- **Name:** A name to identify the dashboard.
- **Description:** A piece of information describing the dashboard.
- **Border width:** Check (select) the checkbox to have border around the widgets of the dashboard and select the width from dropdown box.
- **Public / Private options:** This option will be available only to Administrator and Super Administrator. Select **Private** to make this dashboard available to you. Select **Public** to make this dashboard available to everyone. If you are not an administrator, this will be auto-set as **Private**.



**Note:** You need to provide access rights to the users for whom this dashboard is made public.

- **Prompt on first run:** This is applicable when any of the report placed on dashboard has parameter objects and they are set as dashboard parameters. Keep it clear to load the dashboard with default values of dashboard parameters. Check the checkbox to get parameter entry form when this dashboard is run for the first time after login.
- **Refresh Interval:** Set the time in minutes to refresh all the reports on dashboard. So, if refresh interval for a report is more than refresh interval for the dashboard, refresh interval set at report level will have no effect.

## Creating Widgets

When a new dashboard is created, it has one widget on the layout. Click  (Split Horizontal) and  (Split Vertical) to create multiple widgets by splitting respective widget. Click  (Close) to remove the widget.



**Note:** If there is only one widget on the dashboard, clicking  button will remove the content on widget. It will not remove the widget.

### Placing a report on dashboard

You can place following on dashboard:

- **Report layouts:** To execute a report when you view the dashboard. Here you select a report layout that will be executed when you view the dashboard.
- **Published reports (Saved Reports):** To view reports executed and published. Here you select a report layout followed by selecting its published instance name.
- **Jobs (Scheduled tasks):** To view reports executed through a job (scheduled task). Here you select a report layout followed by selecting job name through which that report was executed.

To place a report on a widget,

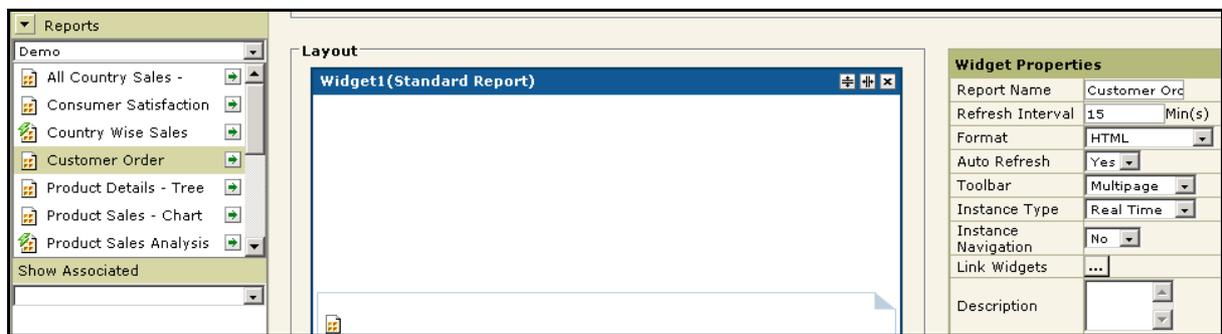


Figure 6: Placing a report on Widget

1. Expand **Reports** header by clicking on the header bar. The Report list will appear.
2. Select the category to view reports deployed in that category.
3. To place a report on a widget, click and drag the report to the widget in which you want to place the report.
4. Optionally select a report followed by selecting an option under **Show Associated**. Select *Saved Reports* to get a list of saved reports (published reports). Select *Scheduled Jobs* to get a list of jobs that has selected report.
5. Set **Widget properties** for the report. The details are provided after these steps.
6. If the report needs user parameters, specify the values of parameter in the area below the **Layout** area.

## Widget Properties (Reports)

Widget Properties	
Report Name	All Country Se
Refresh Interval	15 Min(s)
Format	HTML
Auto Refresh	Yes
Toolbar	Multipage
Instance Type	Real Time
Instance Navigation	No
Ask at runtime	No
Link Widgets	...
Description	

Figure 7: Widget properties for reports

- **Report Name:** This is the name of report that has been placed on the widget.
- **Refresh Interval:** This is the time in minutes. Report re-generation will take place at the end of specified number of minutes. For example, if you want the report to get refreshed after every 15 minutes, set 15 in this entry box.



**Note:** If you do not want to auto-refresh the report, set **Refresh Interval** to zero.

- **Format:** Select the output format in which you want to view the report. Available options are: PDF, HTML, Interactive, Jvista.
- **Auto Refresh:** Select **Yes**, if you want Intellicus to refresh the reports as per the **Refresh Interval**. Select **No** to view the report generated when dashboard was loaded for the first time.



**Note:** **Refresh Interval** and **Auto Refresh** will be disabled when you place a saved report on widget.

- **Toolbar:** Select the most appropriate one among **Yes** (always show toolbar), **No** (never show toolbar) and **MultiPage** (show toolbar only for multi page reports). This is applicable to output formats – HTML and Interactive.
- **Instance Type:** Select **Real Time** to always re-run the report (this way you can always have updated data on the report). Select **Last Instance** to display the report that was saved last time (this will not re-run the report each time, but will display the report that was saved most recently).

## Designing a dashboard

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- **Instance Navigation:** Click **Yes**, if you want to have a dropdown box to select one of the saved reports and view it. Click **No** for not having such a drop down box.
- **Link Widgets:** To link any of the charts available on report in this widget to another widget.
- **Description:** Description for the widget.
- **Ask At Runtime:** This will appear when the report placed on dashboard has run time parameters and **Instance Type** is set to **Real Time**. Select **Yes** to provide parameter values at run time also. Set **No** to provide parameter values only during dashboard designing.

### When report has parameters

Some of the reports need run time values for parameters from the user. For example, monthly sales report may need name of month; salary slip needs employee code for generating respective report, etc.

Parameters can be specified in any of the following ways:

- At the time of dashboard designing
- For the first time a report is run on a dashboard

### Report Parameters

When you select a widget having a report that needs run time user parameters, the screen just below the layout area opens a tab to provide value of these parameters. This is same as the one that appears while previewing, running or scheduling such reports.

The screenshot shows a dashboard layout with two widgets: 'All Country Sales Prompt' and 'Sales Representative Performance'. Below the widgets is a 'Report Parameters' dialog for the 'All Country Sales Prompt' report. The dialog has a title bar and two tabs: 'Select' and 'Sort'. Under the 'Mandatory' section, there are three parameter selection areas: 'Choose the Product Type:\*' (with a list including Audio Systems, Home Accessories, and Mobile Devices), 'Choose the Product Line:\*' (with a list including Alert Devices, Bio-Friendly Soaps, CellPhone, Charger, and Cover), and 'Choose a Country:\*' (with a list including Australia, Belgium, Brazil, Canada, and Chile). Each list has a search box and navigation arrows.

Figure 8: Parameter input form to provide values for user parameters

Specify the parameters and click the **Save** button.

## Dashboard Parameters

During dashboard design, when a report having user parameters is placed on dashboard, its parameters are listed on **Dashboard Parameters** box. When dashboard has multiple reports having user parameters, some of the parameters may be appearing on multiple reports.

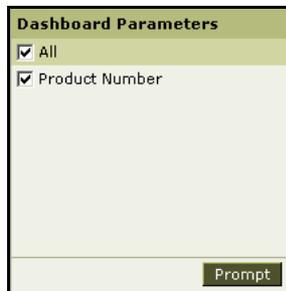


Figure 9: Dashboard parameters box on Dashboard designer

When dashboard report is run, separate parameter entry form appears for getting parameter values for each of such reports.

To get these parameters on a common parameter entry form, select those parameters from **Dashboard Parameters** box. Select **All** checkbox to include all the parameters on that common parameter entry form. Click the **Prompt** button.

Selected parameters are listed in the **Dashboard Level Parameters** page. Specify values here and click the **Save** button. Reports on the dashboard will run using the values specified in the parameters.

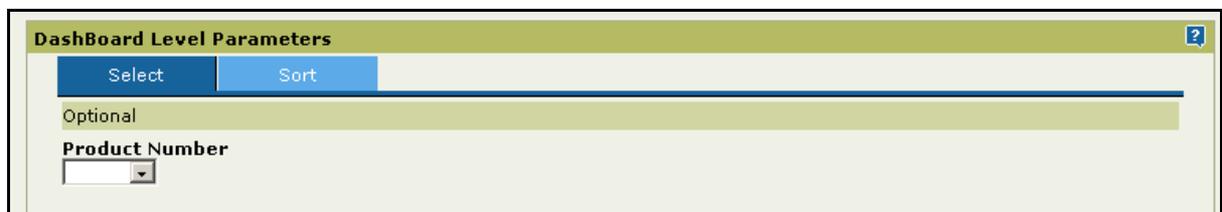


Figure 10: Dashboard Level Parameters form

Either provide values on this page or select **Prompt On first Run** checkbox under the **Dashboard Properties** to provide values for parameter objects when the dashboard is run for the first time.

## Linking widgets

You can link a widget having report (not saved reports) to another widget. The linked widget may have a use case, a report or an external link.



Figure 11: Linking widget

1. Select a widget to link to. (The widget being linked needs to have report with chart on it).
2. In **Widget Properties**, click  in front of **Link Widgets** property to open Link (Widget name) to dialog.
3. Select an Item (chart series) from Item(s) and link it to respective item in Widgets(s).
4. Click  to get one more row to specify link information with another widget/series.
5. Click **OK** to save the work and close the dialog.

Click  to delete a respective row.

### Placing a Use Case on dashboard

To place a use case on a widget,

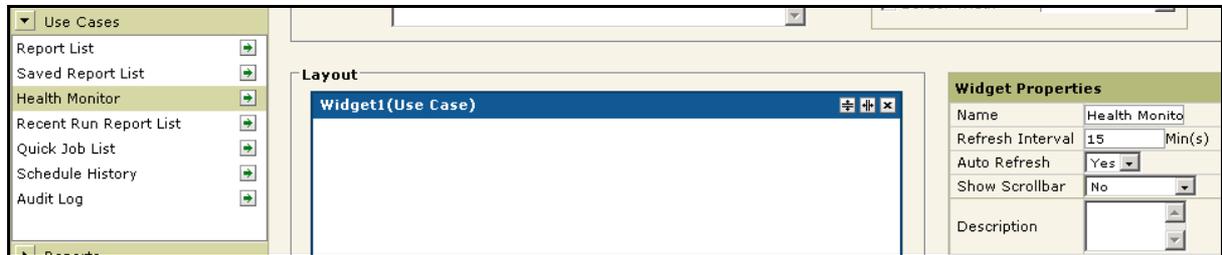


Figure 12: Placing a use case on widget

1. Expand **Use Cases** header by clicking the header bar. Use Case list will appear.
2. To place a use case on a widget, click and drag the use case to respective widget. The use case will be placed on selected widget.
3. Set Widget properties for the use case. The details are provided after these steps.

#### Widget Properties (Use Case)

- **Name:** Name of the user case placed on the widget.
- **Refresh Interval:** This is the time in minutes. The use case page will be refreshed at the end of the specified interval.
- **Auto Refresh:** Set this as **Yes**, if you want Intellicus to refresh the use case page as per **Refresh Interval**. If it is set as **No**, Intellicus will execute it only once (when dashboard is brought in front).
- **Show Scroll Bar:** Select **Yes** to get scroll bar if use case page does not fit in widget width.
- **Description:** Description for the widget.
- **Category:** This option appears when Report List, Saved Report List or Quick Job List is placed on widget. Select the category to carry out respective task (get a list of reports in selected category, get a list of saved reports or quick job lists for selected report).
- **Report:** This option appears when Saved Report List or Quick Job List is selected. Select the report for which saved report list or quick job list is to be viewed.

The use cases appearing in the list will depend on your logon type (Administrator / end-user). Other properties appear based on the use case.

### Placing an external link

To place a use case on a widget,

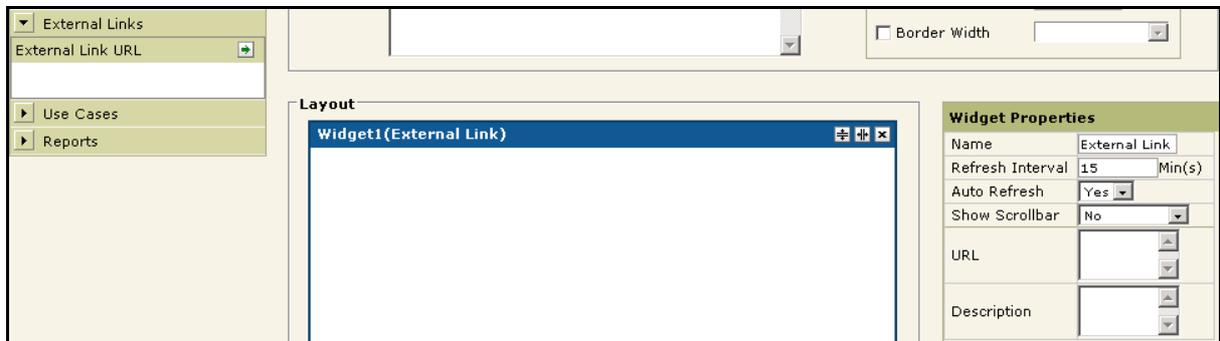


Figure 13: Placing an external link on widget

4. Expand **External Links** header. The **External Link URL** entry will appear.
5. To place an **External Link** on a widget, click and drag the **External Link URL** to prepare widget for a URL.
6. Set Widget properties for the URL. The details are provided after these steps.

#### Widget Properties (external link)

- **Name:** This indicates that it is an external link.
- **Refresh Interval:** This is the time in minutes. The URL will be refreshed at the end of the specified interval.
- **Auto Refresh:** Set this as **Yes**, if you want Intellicus to refresh the URL as per **Refresh Interval**. If it is set as **No**, Intellicus will execute it only once (when dashboard is brought in front).
- **Show Scroll Bar:** Select **Yes** to get scroll bar if external link page does not fit in widget width.
- **URL:** Specify the URL that you want to have in the widget.
- **Description:** Specify the description of the URL set for this widget.

#### Using the button

When you have opened up required widgets before placing items in each of them, you can click  button in respective row to add that item on the next available widget. This way, you do not have to actually drag each item to respective widget.

## Swapping items on widgets

You can swap items placed in widgets. To do this, just drag the item to the widget where you want to place it.

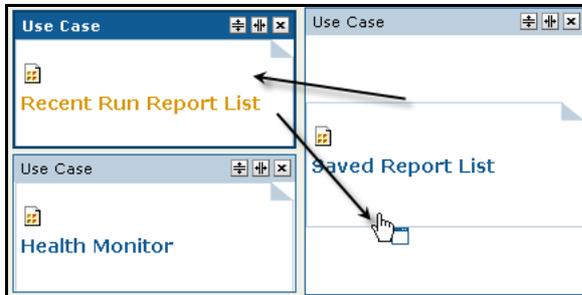


Figure 14: Swapping positions of widget items

In the above example the items **Recent Run Report List** and **Saved Report List** are swapped.

## Dashboard Preferences

Under dashboard preferences, you can specify two pieces of information:

- Select dashboards to be made available for viewing
- Decide the way dashboards are to be displayed

Dashboard Preferences related setups are made on the **Dashboard Preferences** page.

To get **Dashboard Preferences** page from menu pad, click **Dashboard > Preferences**.

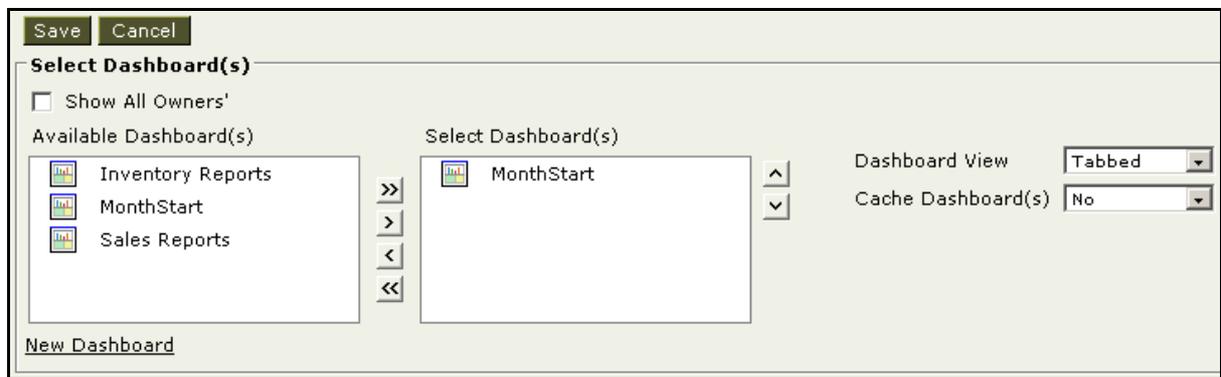


Figure 15: Selecting Dashboards for view



**Note:** To get dashboards made by all the users, check (select) Show All Owners' checkbox. The effect of selecting this checkbox is explained earlier in the document.

### Cache Dashboards

- **On:** Once the dashboard is brought on front, reports will keep on getting refreshed in background. So, next time you get the dashboard in front you will get a faster response.
- **Off:** Reports will be refreshed only when you bring the dashboard in front. Reports that needs to process higher volumes of data, may give slower response.

## Dashboard view

You can setup and view multiple dashboards. At a time, only one dashboard can be viewed. There are two ways you can decide how a dashboard should appear:

Arrange all the dashboards as tabs of a dialog box. You will click a tab header (of respective dashboard) to bring it in front.

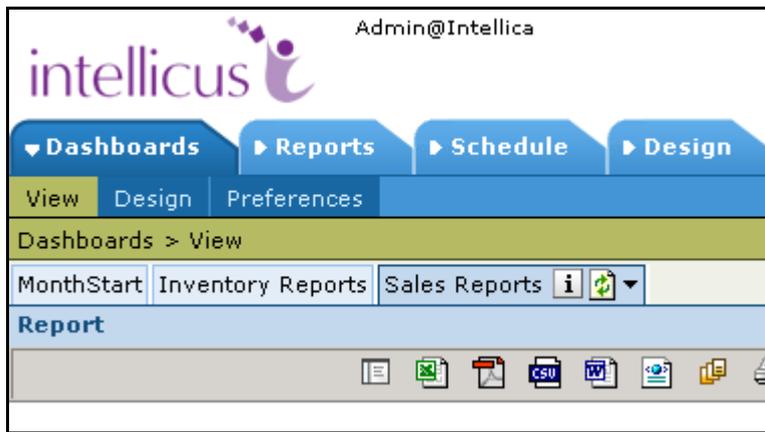


Figure 16: Tabbed view of the dashboard

Display the dashboard placed on the top in **Selected Dashboard(s)** list. Intellicus will provide the **Select Dashboard** dropdown box in top left corner, having a list of all the dashboards. From this dialog box, you can select the option representing the dashboard you want to view.

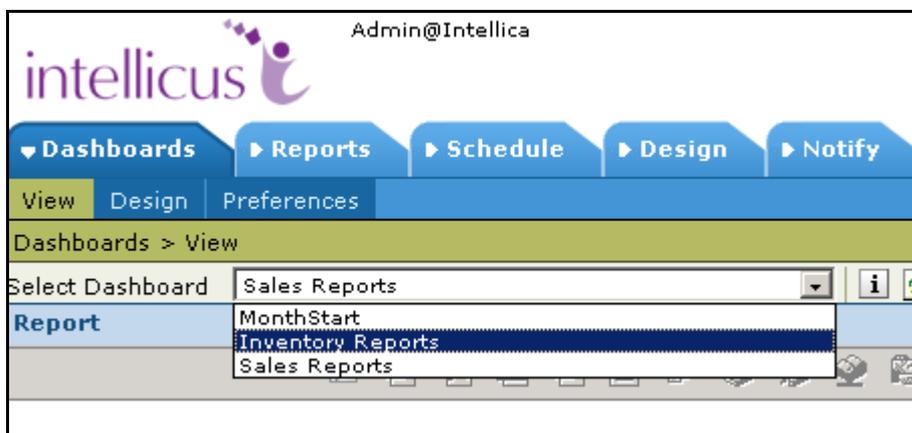


Figure 17: Dropdown box view of dashboard

To setup how a dashboard-view can be selected, you need to select the right option using **Dashboard View** dropdown box.

- **Combo:** To get **Select Dashboard** dropdown box to select the dashboard to view.
- **Tabbed:** To get tabbed appearance of all the dashboards.

### Selecting Dashboards for viewing

To shift a dashboard in the **Selected Dashboard(s)** list,

From **Available Dashboard(s)** list, select the dashboard by clicking it and click  button. The selected dashboard is also shifted to **Selected Dashboard(s)** list. Click  button to shift all the dashboards to **Selected Dashboard(s)** list.

To remove a dashboard from **Selected Dashboard(s)** list, select the dashboard from the list, and click  to remove the selected dashboard. To remove all the dashboards, click  button.

To decide sequence of dashboard tabs (left to right) and dashboard options in combo (up to down), make use of  and  button placed on the right of the **Selected Dashboard(s)** list.



**Note:** To get dashboards made by all the users, check (select) **Show All Owners'** checkbox. The effect of selecting this checkbox is explained earlier in the document.

## The Dashboard Viewer

Dashboard viewer appears when you launch Intellicus and login using your user name and password. To view dashboard when you are already in Intellicus,

- Click  (Home) button. This button appears on top left of the page.
- Click Menu pad **Dashboard > View**.

Generally all you do on a dashboard is view the contents of various items placed on dashboard.

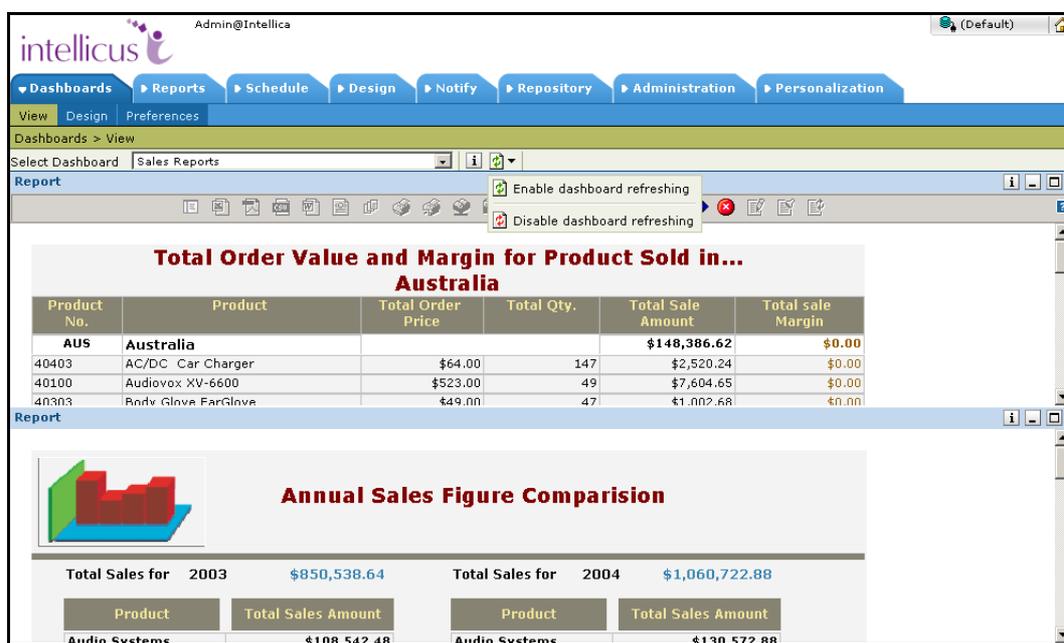


Figure 18: Viewing the dashboard

Depending on the setup, a dashboard may have one or more items on it. Each item on a dashboard is displayed in its own widget (*window* or *box*). The title bar of each of the widget has item type listed: Report, External URL or name of the use case.

The buttons on the right side of title bar are:

	To view the description of widget.
	To minimize the widget.
	To maximize the widget
	To re-store the size of widget.

### Selecting the dashboard to view

Dashboards may have a tabbed view or dropdown box view.

If you have tabbed view of the dashboard, select the tab representing the respective dashboard. If you have dropdown box view, select the respective dashboard name from options appearing in the dropdown box.

### Refreshing reports on dashboard

Click  button to refresh the dashboard.

- If the screen has  icon, click  to get dropdown options. Click  button to bring it on the page. The button changes to **Refresh Now**.
- To disable dashboard refreshing, click  to get dropdown options. Click  button.

### When dashboard reports have Parameters

When dashboard reports having parameters are viewed on dashboard, you will be prompted for parameter values based on settings done during dashboard design:



The screenshot shows a web interface for a dashboard. At the top, there are navigation tabs: Dashboards, Reports, Schedule, Design, Notify, Repository, Administration, and Personalization. Below these, there are sub-tabs: View, Design, and Preferences. The main content area is titled 'Dashboards > View' and shows 'Product Reports' with a dropdown menu. Below this, there is a section titled 'Select Parameter Values'. This section contains a 'Select' button, an 'Optional' checkbox, and two dropdown menus: 'Product Line' (set to 'CellPhone') and 'Product Type' (set to 'Home Accessories'). At the bottom right of the form, there are 'Run' and 'Reset' buttons.

Figure 19: Common parameter form for dashboard parameters

- Common parameter form will appear for all the parameters that are selected as Dashboard parameters and **Prompt on First Run** checkbox is checked.
- Separate parameter forms will appear for report parameters (not selected as dashboard parameters) and **Prompt at Runtime** checkbox is checked.

Specify values in parameters and click the **Run** button to run reports.



**Note:** Please refer to IntellicusEnduserReference.pdf for instructions on providing values for parameters.

### Using Dashboard Drilldown feature

When a widget is hyperlinked with another widget, you can refresh another widget by clicking its respective chart series.

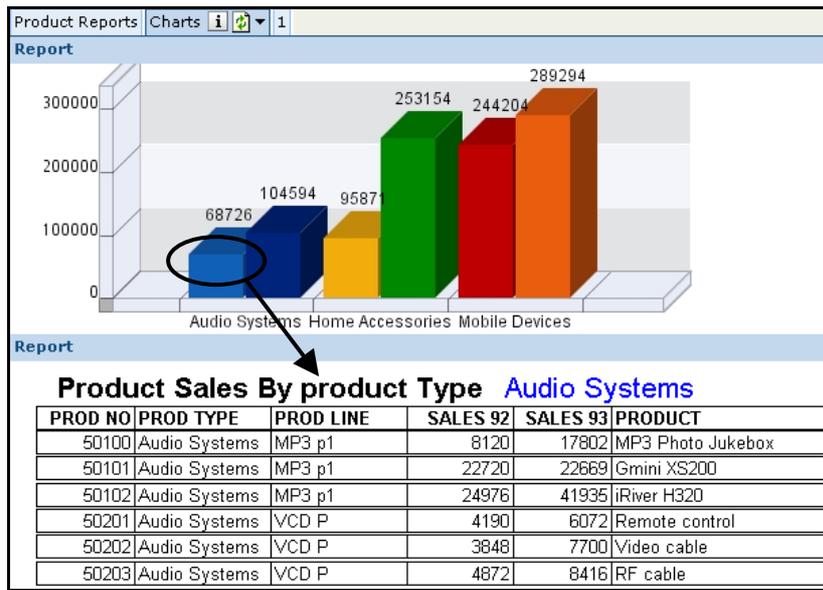


Figure 20: Linked widgets

In the above example, if you click chart series from *Audio Systems*, it will refresh the report on lower part. The refreshed report will have data of *Audio Systems*.

