



Creating Dashboards

Intellicus Enterprise Reporting and BI Platform



©Intellicus Technologies
info@intellicus.com
www.intellicus.com

Copyright © **2011** Intellicus Technologies

This document and its content is copyrighted material of Intellicus Technologies. The content may not be copied or derived from, through any means, in parts or in whole, without a prior written permission from Intellicus Technologies. All other product names are believed to be registered trademarks of the respective companies.

Dated: - December 2011.

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> .

Contents

Creating Dashboards	4
Dashboard Viewer	5
Adding a dashboard	7
Adding dashboard-widgets on the dashboard.....	7
Saving the dashboard	8
Saving As a Dashboard.....	9
Removing a dashboard	9
Removing a dashboard from repository	11
Viewing Dashboard	12
Editing a Dashboard.....	12
Setting Dashboard Preferences	15
Repository Explorer	16

Creating Dashboards

Dashboard displays multiple pieces of information arranged on a single screen so that it can be viewed and monitored at a glance. A dashboard can have reports as well as web content. It acts as an interface for business analysts and application administrators to analyze their systems in a comprehensive and personalized manner.

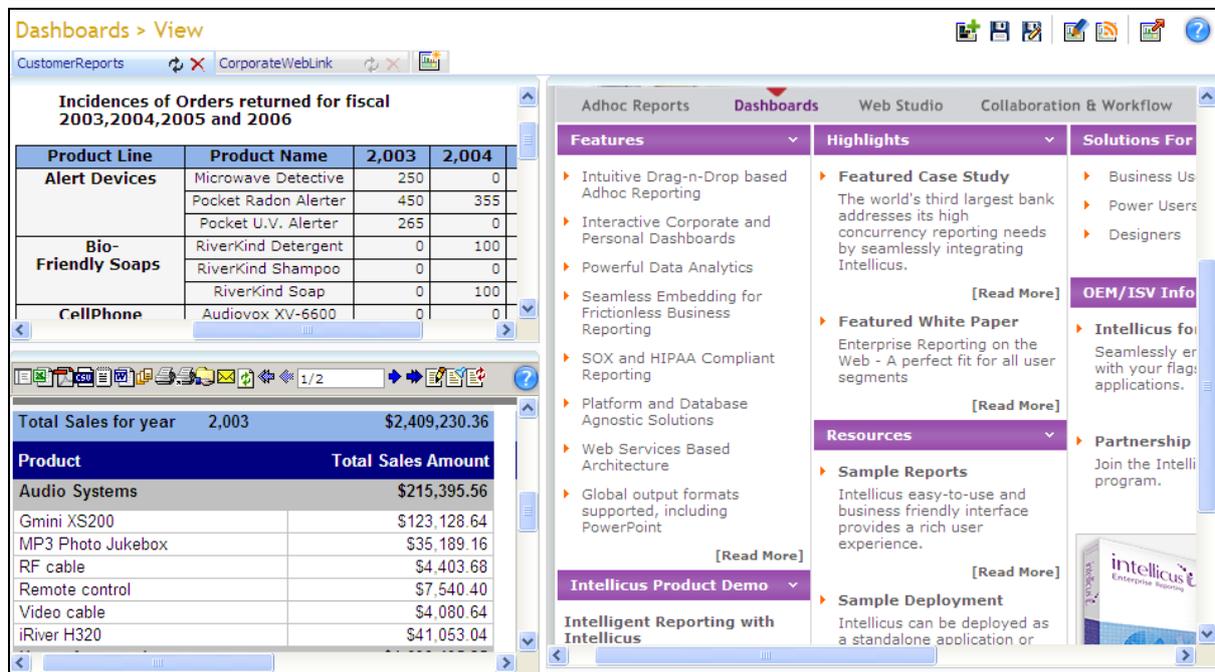


Figure 1: Dashboard

When using Intellicus Enterprise edition, you can design multiple-dashboards. Each of the dashboards may have multiple widgets on them.

Your dashboard may have:

- **Reports:** This includes Adhoc reports, standard reports as well as OLAP reports.
- **Published reports:** These are the reports that are already executed and saved on report server.
- **Web links:** The way we specify URL of a web site on browser, you can set a URL to be viewed on dashboard.

Report, Published report or web link is set on dashboard-widgets. Multiple widgets are then placed on dashboard.

As an **End user**, you can make use of pre-designed dashboard widgets and design dashboards for private use. You can also subscribe to dashboards made available to you by Administrator / super administrator.

Dashboard Viewer

On dashboard, in addition to viewing information, you can open a new tab to create a new dashboard or subscribe to an existing dashboard as well as add, re-position or remove a dashboard-widget.

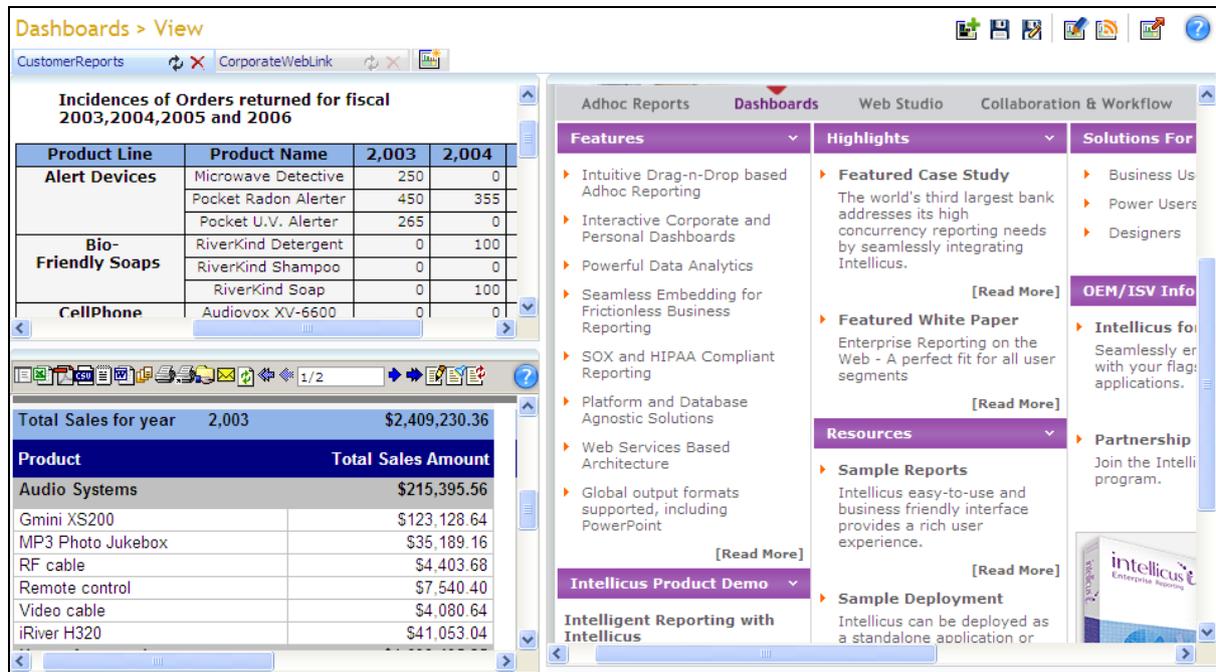


Figure 2: Dashboard

To refresh data on the dashboard, click button on corresponding dashboard tab.

By default, dashboard is displayed in viewer area. Click button to open full-screen mode. It opens as a new window. After opening the viewer in full-screen, when you change the viewer-width, pane size will change accordingly. You can change widget height and pane width.



Figure 3: Dashboard opening in full-screen view

Dashboard may have one or more vertical/horizontal panes. A pane may contain one or more widgets arranged one below other or side by side. A widget may contain a report or a web link. If some of the information on widget is not visible due to its size, you can change widget height as well as pane width to make the information visible.

ConsSatisTrnds		
Incidence of Orders Returned for Reason		
2003,2004,2005 and 2006		
Product Line	Product Name	2,003
Alert Devices	Microwave Detective	250
	Pocket Radon Alerter	450
	Pocket U.V. Alerter	265
Bio-Friendly Soaps	RiverKind Detergent	0
	RiverKind Shampoo	0
	RiverKind Soap	0

Figure 4: Dashboard Widget

When you hover the mouse pointer on widget-title, title-bar opens up and remains open for a few seconds. Title-bar has buttons.

- Click button to maximize the widget. When you maximize a widget, it gets spread across the entire viewer area.
- Click button to minimize the widget. When you minimize a widget, it is reduced to just the title-bar.
- Click button to refresh the data displayed inside a widget.
- Click button to restore widget to its original size. To remove the widget from dashboard, click button.

You can re-position widgets on your dashboard. To re-position a widget, click title-bar of the widget, drag it to the new position and drop it there. The widget will be placed at the new position. Other widgets in the pane will get adjusted automatically.

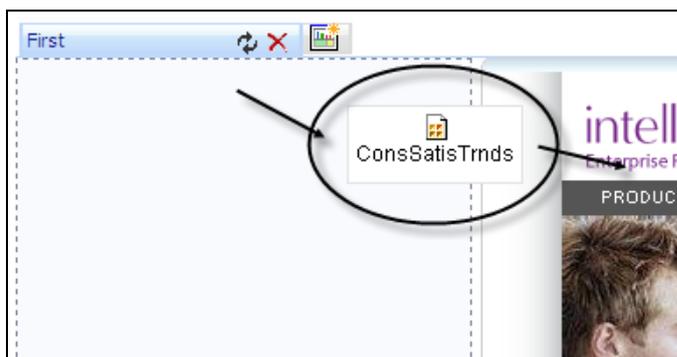


Figure 5: Re-positioning a widget on dashboard

To save the changes made on a dashboard, click button.

Adding a dashboard

Note: You can create multiple dashboards in Intellicus Enterprise Edition.

You may create a new dashboard as well as subscribe to an existing dashboard.

Click  button on dashboard tab to open a new dashboard tab. Next step is to drag and drop widgets on the dashboard.



Figure 6: New Dashboard button and Open Existing Dashboard button

To subscribe an existing dashboard, click  button on dashboard tab. Object Selector area will open where you navigate to the desired folder and select the dashboard you want to subscribe.

From the dashboards listed in Object Selector area, Double-click the dashboard you want to subscribe to.

Adding dashboard-widgets on the dashboard

You can add dashboard widgets on a dashboard (new or existing). Dashboard widgets are available in folders. (If you have not created a dashboard widget, create it before creating the dashboard).

Click  button. Object Selector area will open where you navigate to the desired folder and select the widget to add.

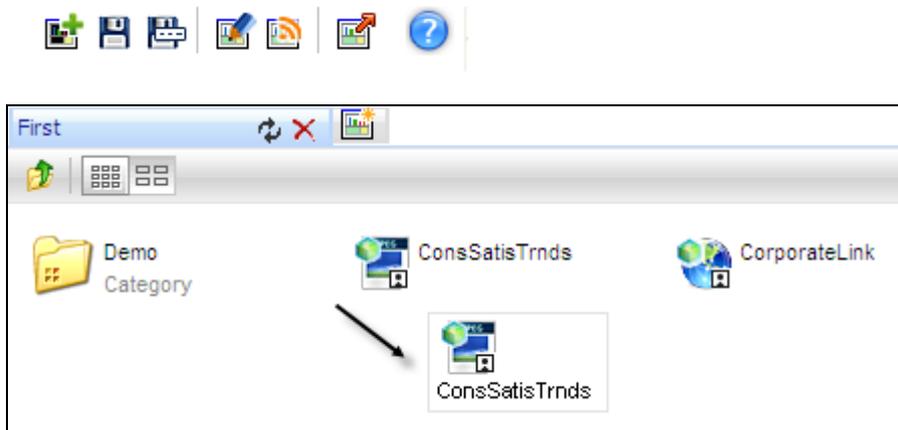


Figure 7: Adding a widget on dashboard

Saving the dashboard

To save the changes on the dashboard, click  button. To **Save As** a dashboard, click  button. When you Save As a dashboard, you can save the open dashboard like a new dashboard.

When you save a dashboard as Save As, there is an option to add description regarding the dashboard. The same description is available from Edit option in Dashboard.

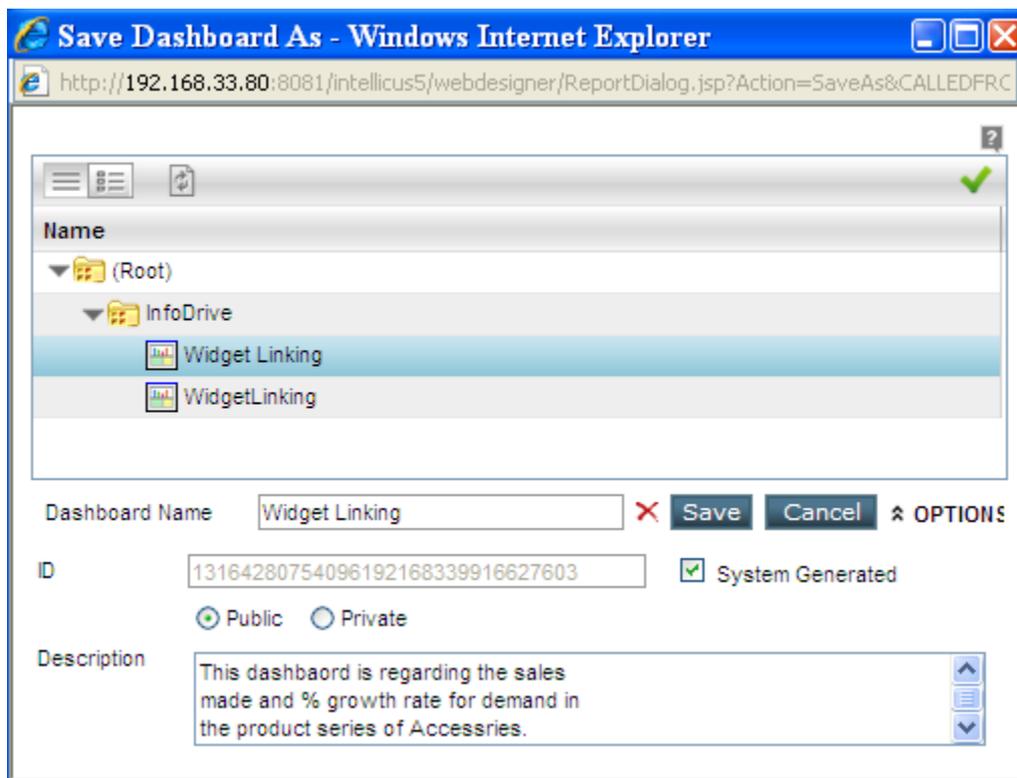


Figure 8: Save As a Dashboard



Figure 9: Description of Dashboard

Saving As a Dashboard

1. Open the Dashboard which already exists.
2. Click Save As button.
3. A Save As dialogue is available. Mention the name of the Dashboard. Click 'Options' to have access to more properties. There is a checkbox available "Copy Access Rights". This checkbox is to be checked if the access rights need to be the same for both dashboards, source and target (saved as). Keep the checkbox as unchecked if you want to assign different access rights for the dashboards.

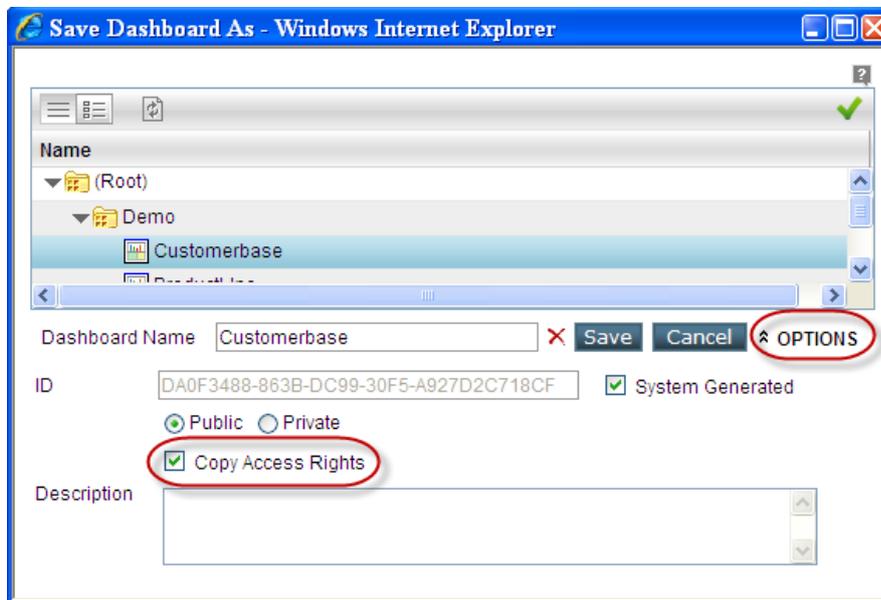


Figure 8: Save As a dashboard Object

4. Click Save. This will close the Save As dialogue after saving the settings.

Removing a dashboard

Click **X** button on the tab to remove that dashboard.



Product Line	Product Name	2,003
Alert Devices	Microwave Detective	250
	Pocket Radon Alerter	450
	Pocket U.V. Alerter	265
Bio-Friendly Soaps	RiverKind Detergent	0
	RiverKind Shampoo	0
	RiverKind Soap	0

Figure 10: Removing a dashboard

When you remove a dashboard, it will be removed from Dashboard Preferences list.

To remove it from saved location as well, check **Remove this dashboard from Saved location** check box on **Remove tab** dialog.

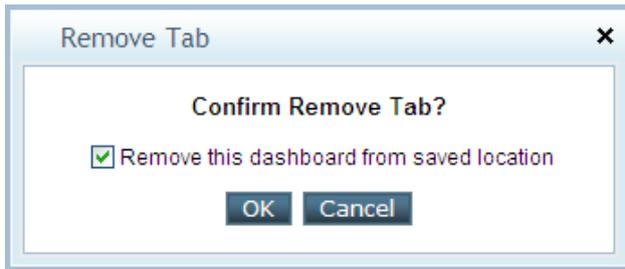


Figure 11: Remove Tab dialog

Removing a dashboard from repository

If a dashboard is not displayed (because it is not selected on **Dashboard Preferences** page) you can delete such a dashboard from **Repository Explorer**.

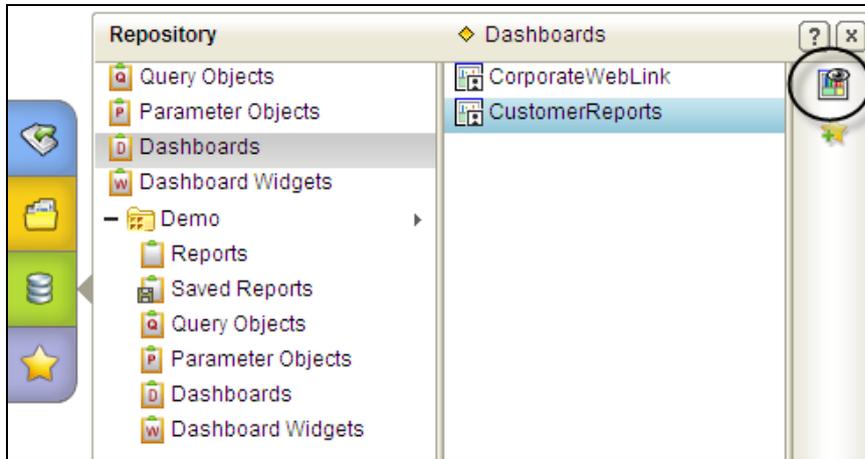


Figure 12: Repository Explorer

On **Explorer**, click **Repository** and navigate to the folder in which the dashboard to be deleted is located.

Select the dashboard to be deleted and open it to view by clicking  button. Only the selected dashboard will open in viewer.

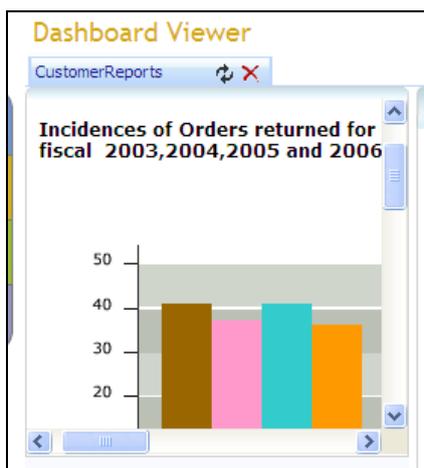


Figure 13: Dashboard open in Dashboard Viewer

Now you can follow the steps that you follow to remove a dashboard.

Users who have selected this dashboard for view, will no longer get this dashboard. For the reference of the users, such dashboard is still listed under **Selected Dashboards** on **Preferences** Page.

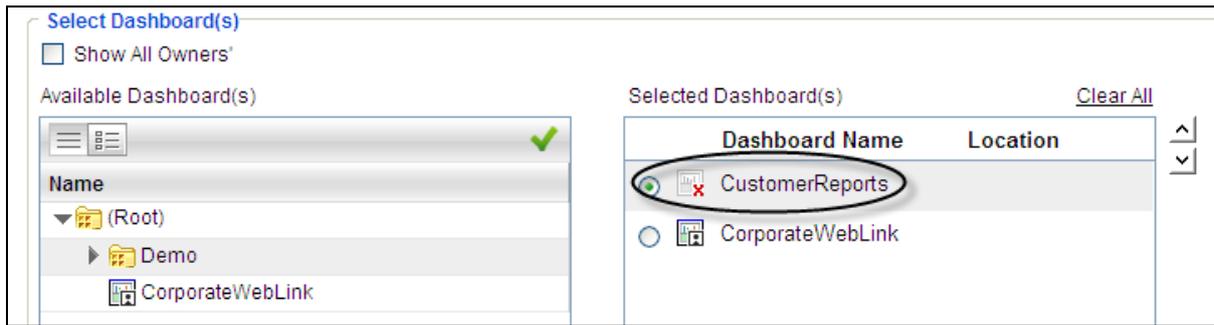


Figure 14: Notice the cross on deleted dashboard

You can select that dashboard and click  to remove the deleted dashboard from **Selected Dashboard(s)** list.

Viewing Dashboard

When you design a dashboard, it is automatically added in **Selected Dashboards** list of dashboard Preferences, and so is displayed when you login in Intellicus.

When you have navigated away from dashboard, click Navigation > Dashboards > View to view the selected dashboard(s).

Editing a Dashboard

When you click  button, **Properties**, **Layout** and **Information** area of the dashboards opens up.



Figure 15: The area that opens when you click Edit Dashboard button

To auto-refresh a dashboard at a regular interval, check the **Auto-refresh every** check-box and specify time in terms of minutes in **Min(s)**. This will automatically refresh the dashboard after the set number of minutes.

Check **Prompt on First Run** checkbox to display Input Parameter Form to get value of Dashboard parameters before reports on dashboard are run for the first after displaying the dashboard.

Note: This is not applicable to the reports that have parameters that are not dashboard parameters.

In **Layout** area, you can select number of panes the dashboard should have.

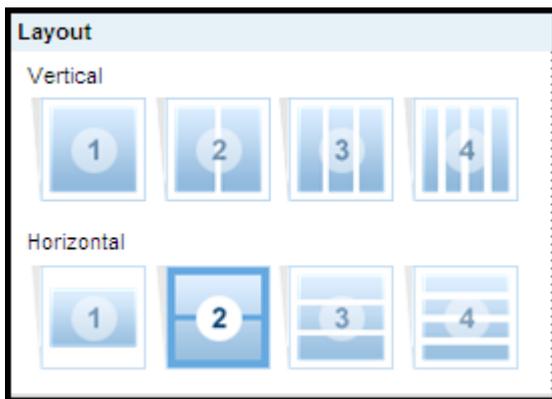


Figure 16: Layout area having dashboard layout options

When changing a layout having less panes to more panes, panes will be added as per selected layout. Vertical layout will have panes added to the right and horizontal layout will have it added one below the other. Similarly, when changing the layout from more panes to less panes, then panes would also be adjusted so there will be no loss of any widget.

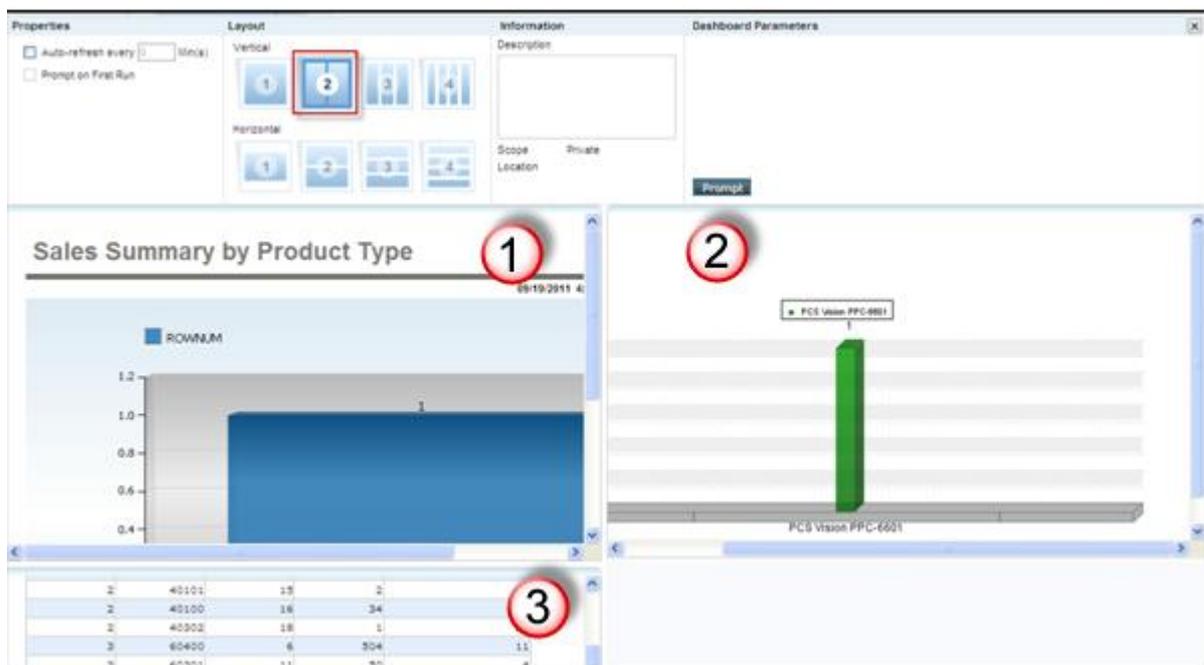


Figure 17: Layout Vertical style 2 is selected.

In Fig.17, there are three panes 1, 2 and 3. When we move to vertical layout style as 1 then in Fig.18, panes 1, 2 and 3 are adjusted and no data is lost.

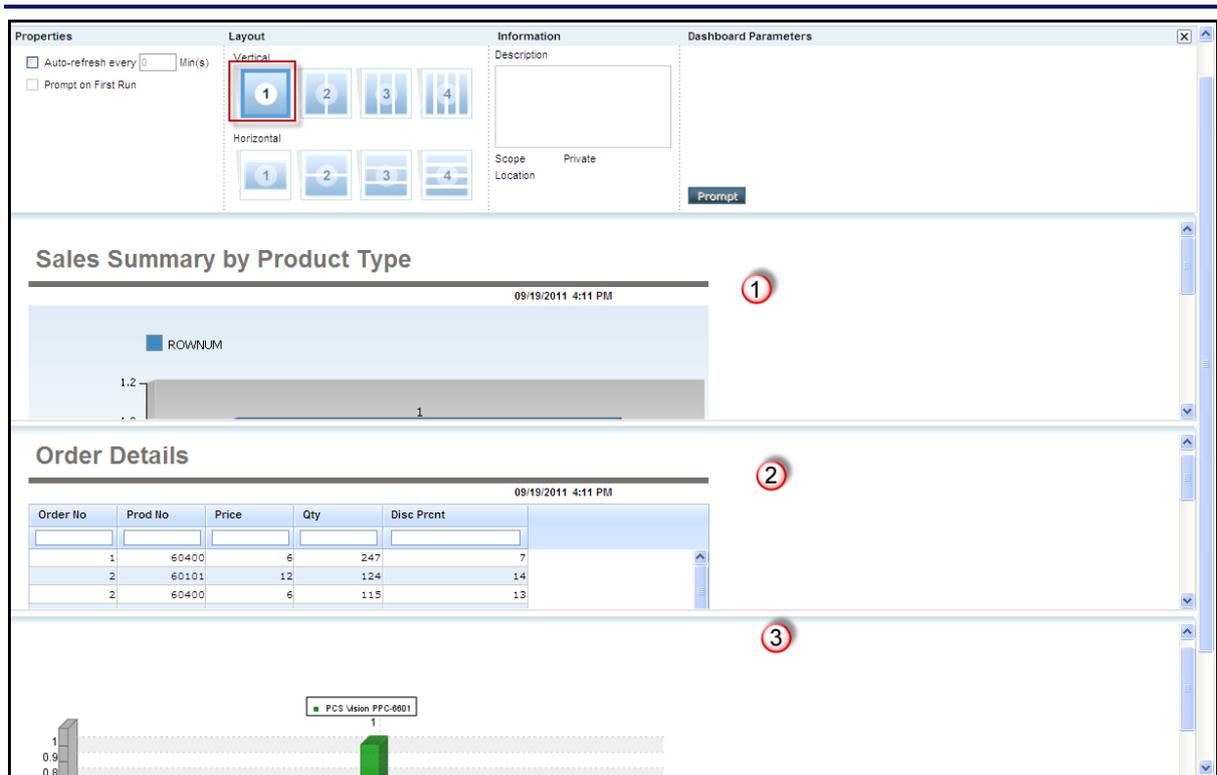


Figure 18: Layout Vertical style 1 is selected.

Information area displays Description, Scope and Location where the dashboard is saved.

Many a times, same parameter, for example "Report Date" might have been used "By Ref" in multiple dashboard-reports. Such parameters are known as **Dashboard Parameters**. Value of such a parameter will be used by all the reports where this parameter is used.

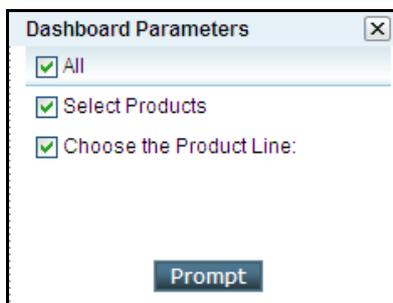


Figure 19: Selecting Dashboard parameters to be placed on common IPF

Check the parameters for which you want to provide values on a common Input Parameter Form (IPF) and click **Prompt** button to open the IPF.

On IPF, provide parameter values and click **Run** to start report generation. Value specified on common IPF is saved when you save the dashboard viewer. Click **Reset** button to cancel the changes made and revert to previously parameter saved values.

Setting Dashboard Preferences

Out of the dashboards you designed or the dashboards available to you, you need to select dashboards that you wish to view. This task is performed on **Dashboard Preferences** page.

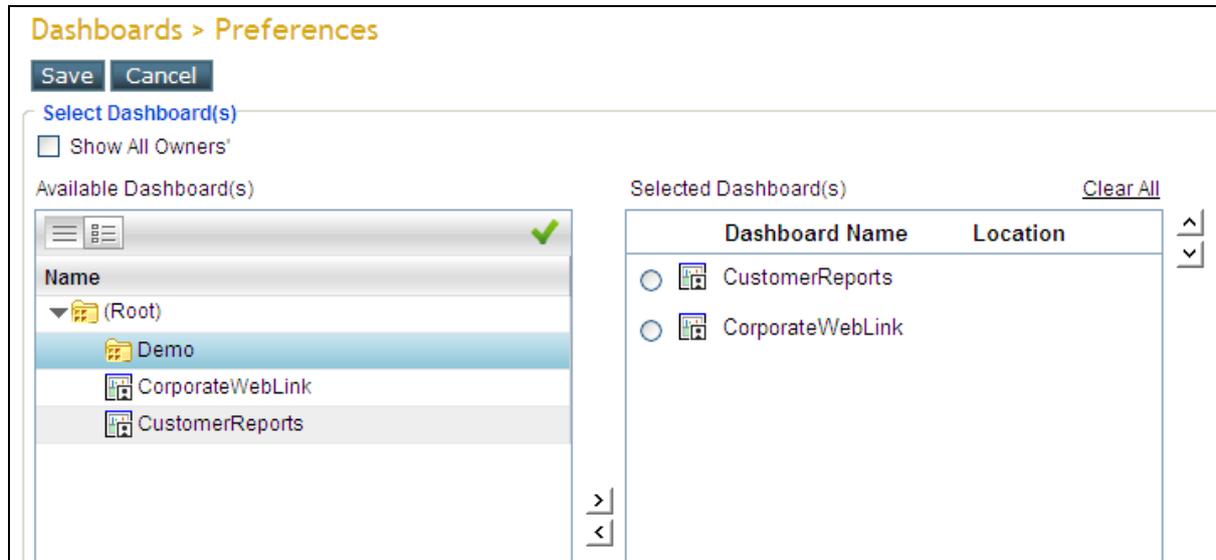


Figure 20: Dashboard Preferences

Dashboards are available in folders. To get dashboards made by all the users, check **Show All Owners'** checkbox (available only to application administrators).

Navigate to the folder in which a dashboard is available, and click to select it.

To shift a dashboard in **Selected Dashboard(s)** list, from **Available Dashboard(s)** list, select the dashboard by clicking it and click the **>** button. The selected dashboard's name is also displayed in **Selected Dashboard(s)** list.

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

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

Important: You can have multiple dashboards in Selected Dashboard(s) list when you are running Intellicus Enterprise Edition.

Repository Explorer

You can access a dashboard from Repository Explorer. Repository Explorer not only provides hierarchical view of folders and Dashboard within each folder, it also allows you to carry out many operations on selected dashboard.

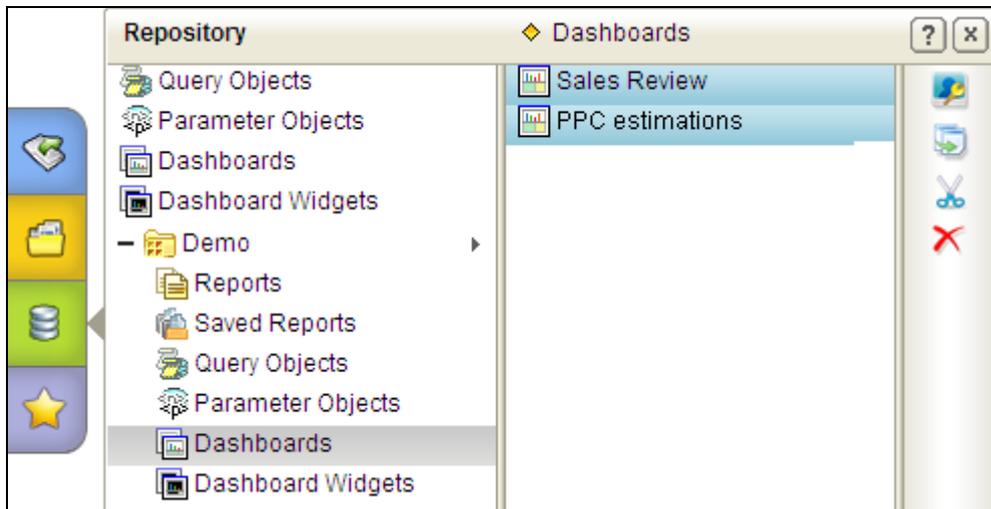


Figure 21: Dashboards visible on Explorer

You can do following when you select multiple dashboards at a time:

- Set Access Rights
- Copy, paste and cut paste the dashboard
- Delete the dashboard

If you select only one dashboard, you can also do following in addition to the above:

- View / Edit the selected dashboard
- Add the selected widget to favorites

Refer to online help to know more on for each of these actions.

