

# Creating Dashboards

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Intellicus Enterprise Reporting and BI Platform



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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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# 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.

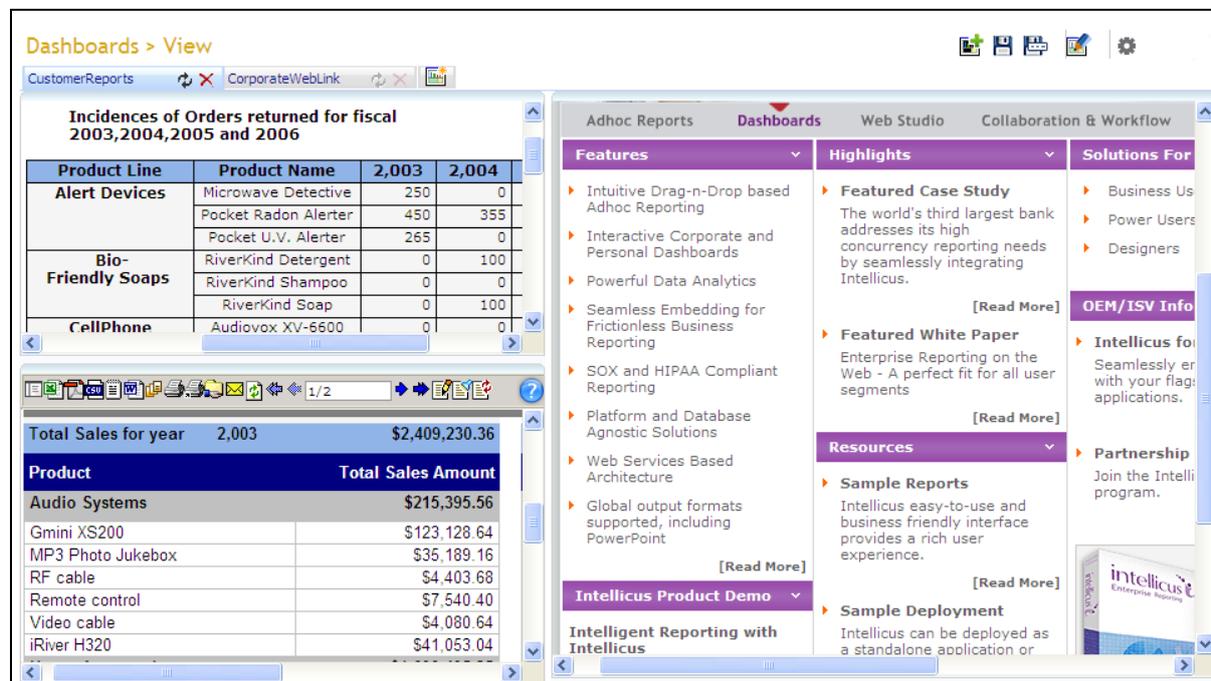


Figure 1: Dashboard

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.

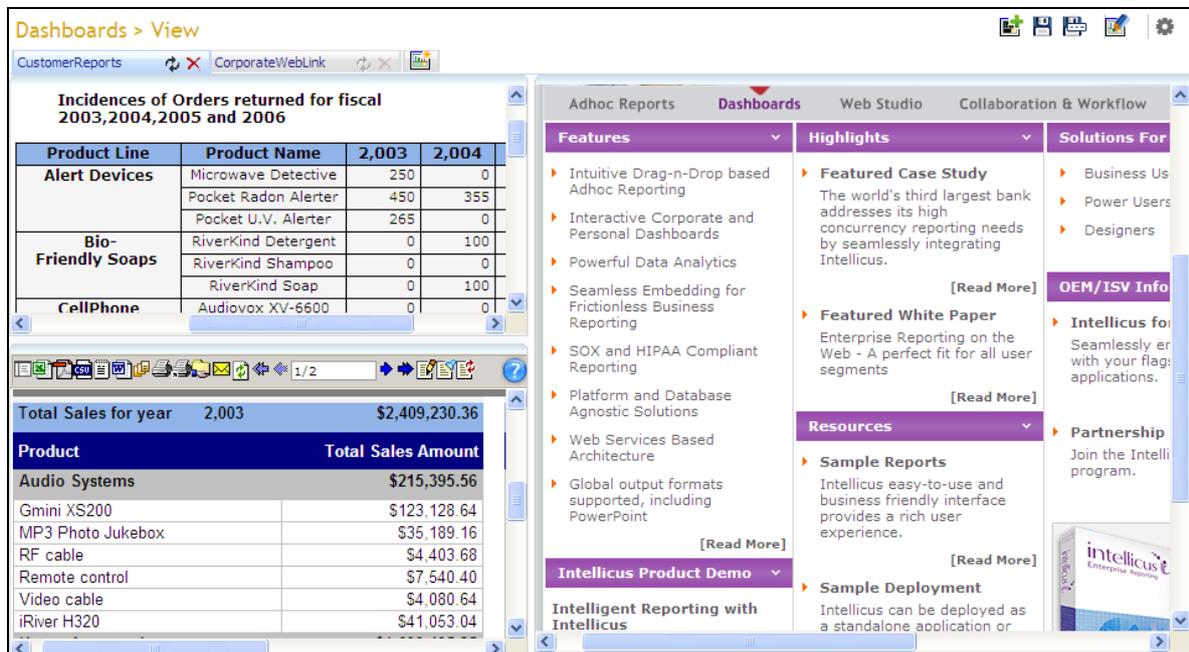


Figure 2: Dashboard

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

By default, dashboard is displayed in viewer area. Click button to select full-screen option. 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.

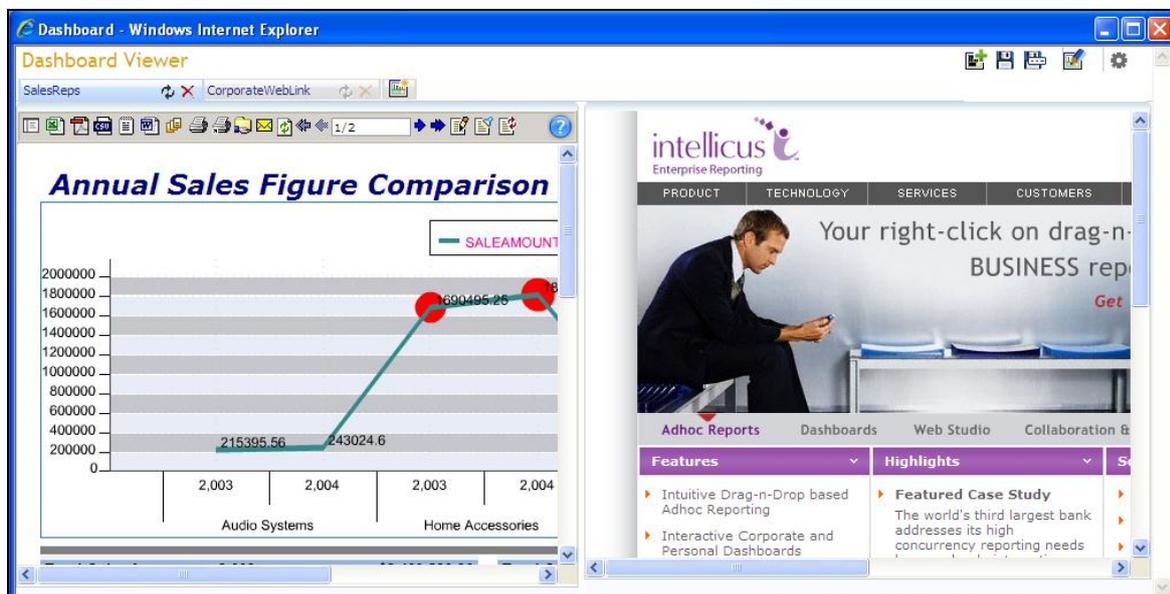


Figure 3: Dashboard opening in full-screen view

Dashboard widgets that contains chart alone can get seamlessly refreshed without showing a loading image. This helps in lag-free data display when the data is constantly changing.

Dashboard may have one or more vertical panes. A pane may contain one or more widgets arranged one below other. 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.



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 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.

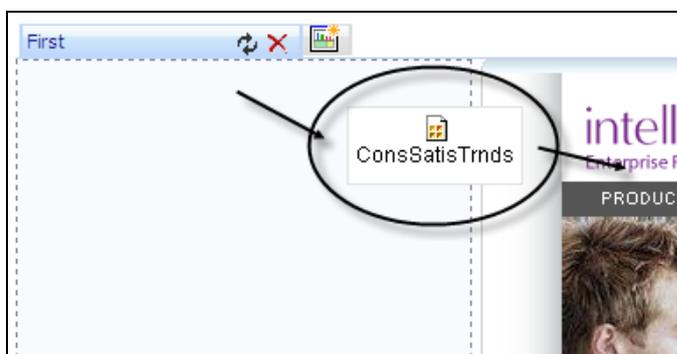


Figure 5: Re-positioning a widget on dashboard

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.

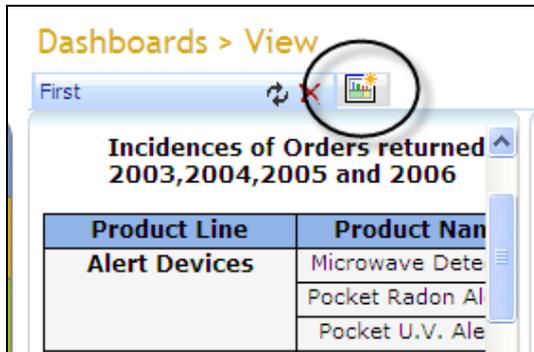


Figure 6: New Dashboard button and Open Existing Dashboard button

To subscribe an existing dashboard, select Subscribe under  button on dashboard tab. Object Selector area will open up where you can 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.

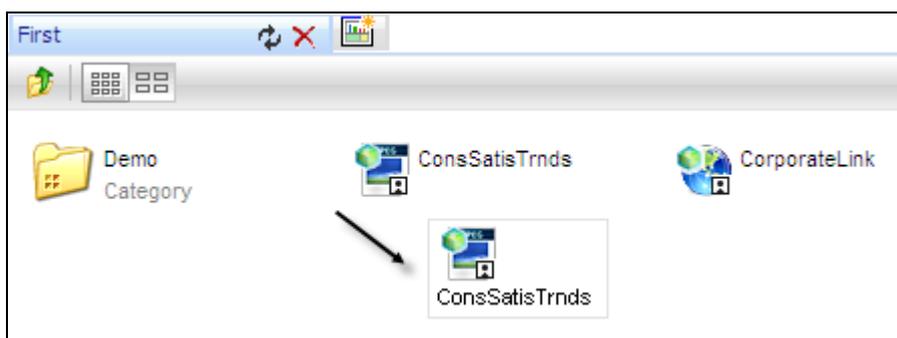


Figure 7: Adding a widget on dashboard

When widgets are listed on Object Selector area, select a widget to view its description on right side of the area. To get the selected widget on dashboard,

click the widget, drag and drop on the pane where you want to position the widget.

## 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.

## Removing a dashboard

Click  button on the tab to remove that dashboard.



The screenshot shows a dashboard tab titled "First" with a close button (X) highlighted. The dashboard content is a table with the following data:

Incidences of Orders returned for fiscal 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 8: 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.

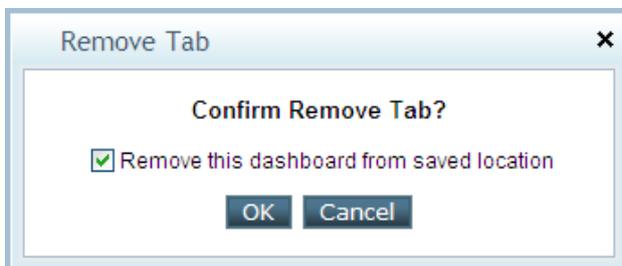


Figure 9: Remove Tab dialog

## Removing a dashboard from data model

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

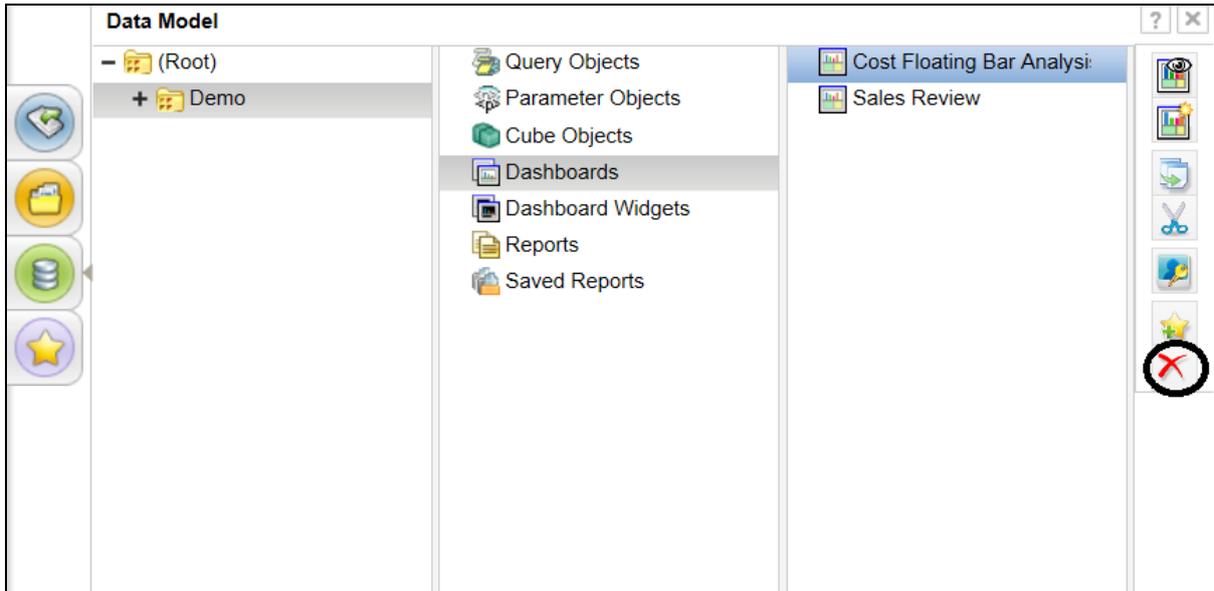


Figure 10: Data Model Explorer- Delete

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

Select the dashboard to be deleted and remove it by clicking  button. Click **Yes** on the confirmation pop-up window.

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.

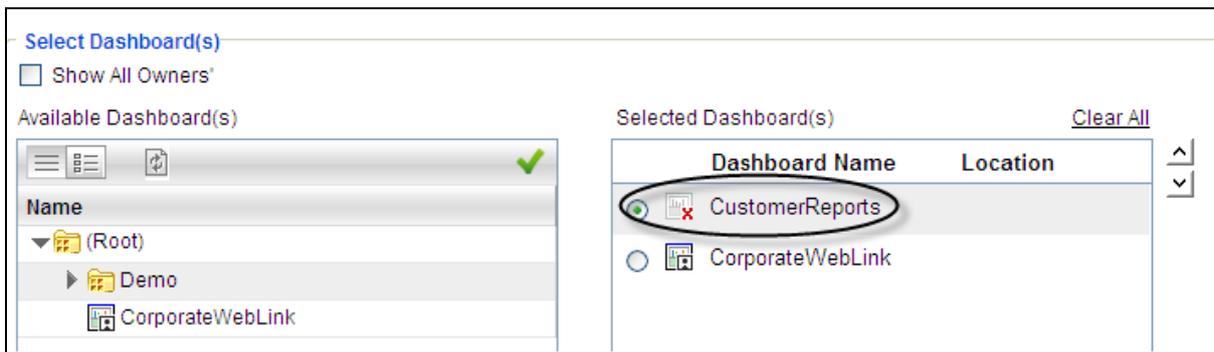


Figure 11: Notice the cross on deleted dashboard

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).

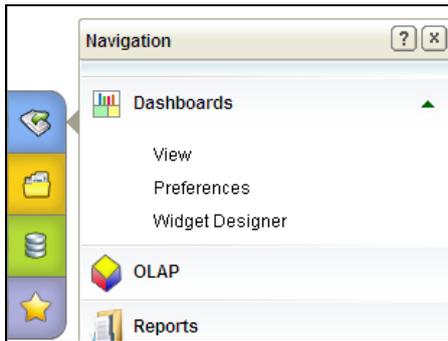


Figure 12: Viewing Dashboard from Viewer

- Click Favorites > Dashboards > View to view the selected dashboard(s).  
If dashboard is added as favorites then only this option will be available.

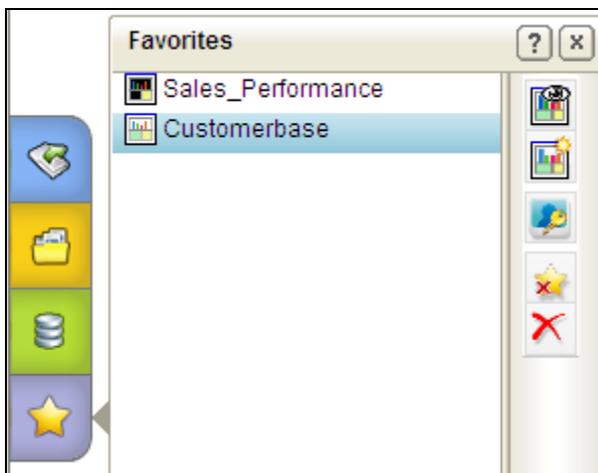


Figure 13: Viewing from Favorites

- Click Data Model > Dashboards > Select the Dashboards> View to view the selected dashboard(s).

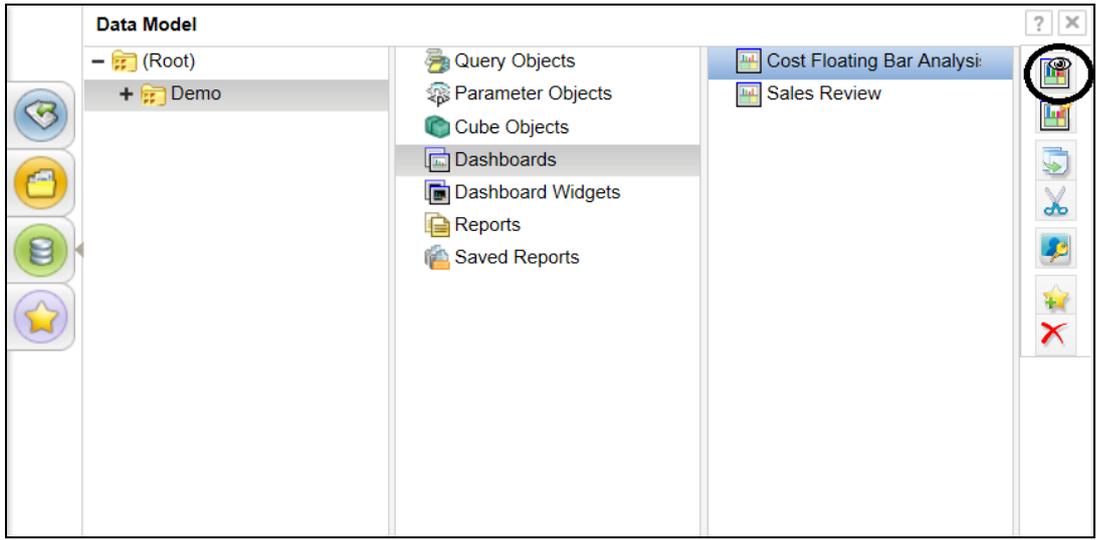


Figure 14: Viewing from Data Model

### 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 **Refresh Every x Minutes** 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 **Select Values While 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.

Select **Show Widgets Border** to enable whether you wish to see the widgets on the dashboard with borders.

You can now configure widget bar to appear fixed on the top of the widget. This is useful to show the title of the widget or KPI. The title space inside the widget, chart or report can be saved by this. You can configure this by unchecking the property - **Auto Hide Widget Title Bar**.

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

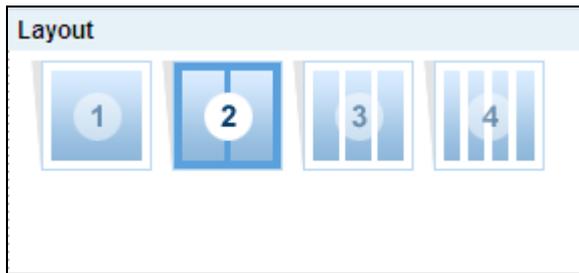


Figure 16: Layout area having dashboard layout options

When changing a layout having less panes to more panes, panes will be added on the right side. Similarly, when changing the layout from more panes to less panes, panes (including widgets if any) will be removed from right side.

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

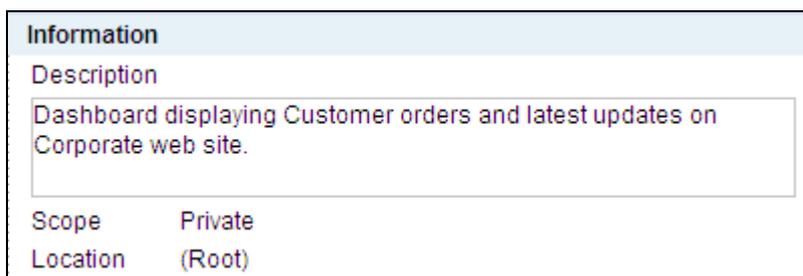


Figure 17: Information area of dashboard

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 18: 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.

You can also specify the **Position** as Top or Left, **Size**, **Max. Columns** and **Column Width** for the parameters to appear on the IPF.

Checking the **Auto Hide** option will not show up the dashboard parameters upon running the dashboard.

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.

**Note:** You can toggle between the View and Edit modes from under Tools  icon.

## 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.

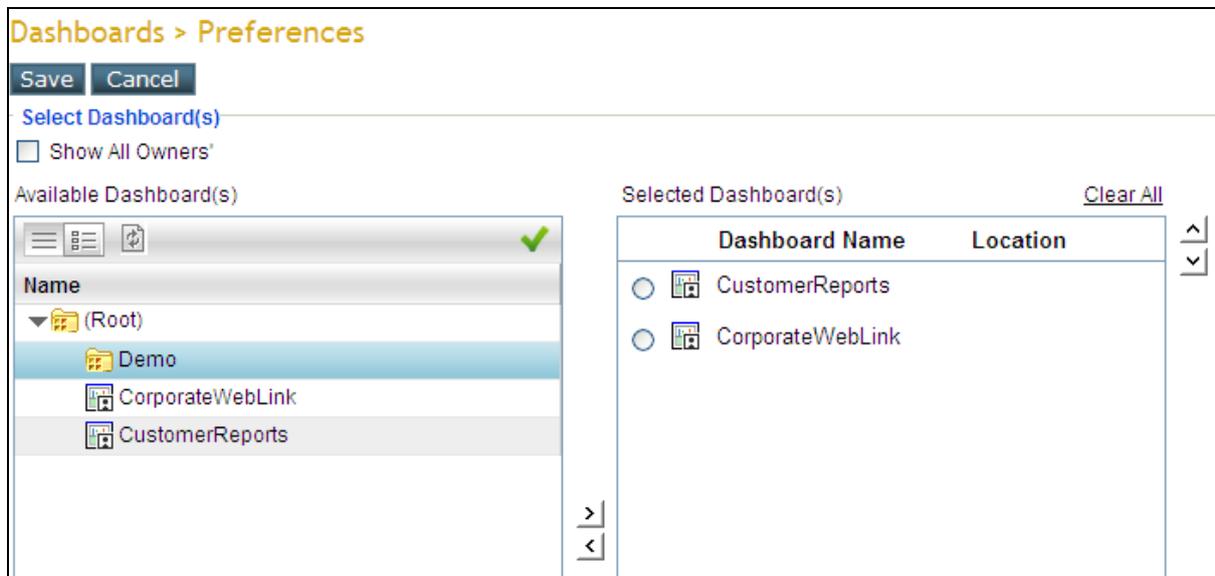


Figure 19: Dashboard Preferences

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.

## Data Model Explorer

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

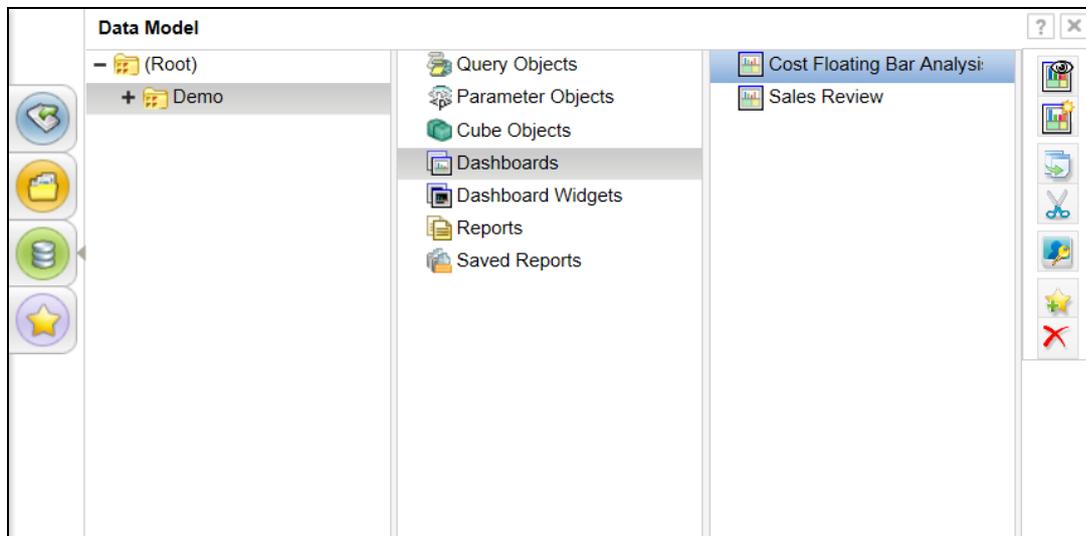


Figure 20: Dashboards visible on Data Model Explorer

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.