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# Creating Dashboards

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Intellicus Enterprise Reporting and BI Platform



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## **Acknowledgements**

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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.

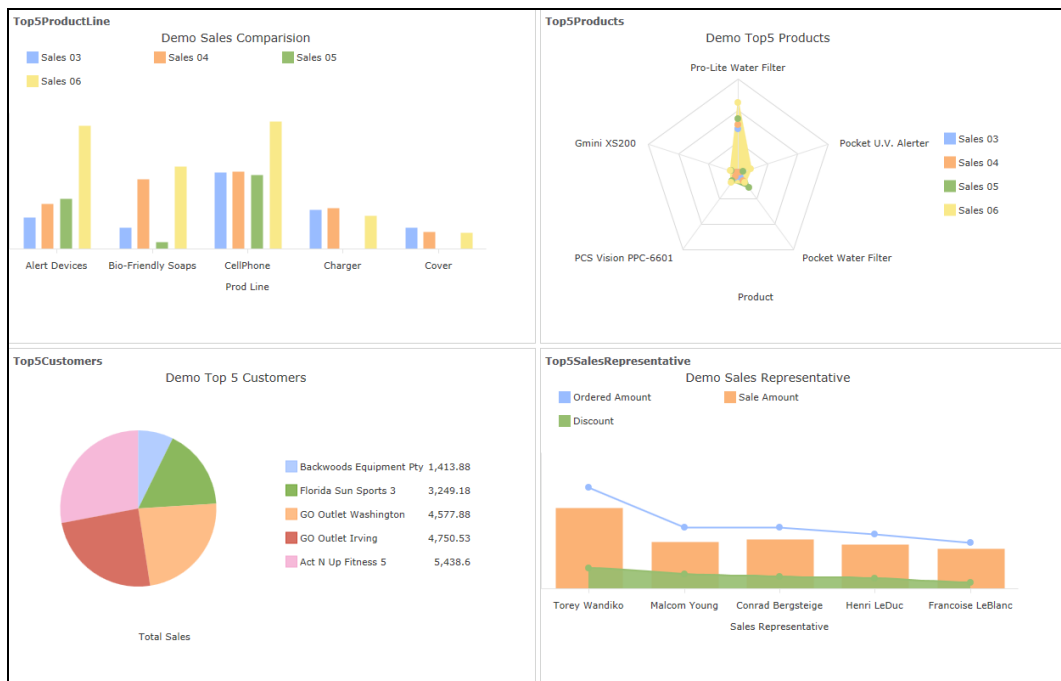


Figure 1: Dashboard

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 Ad hoc 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.


By default, dashboard is displayed in the View Mode. Click  button to select **Switch to Edit Mode** option.







Figure 2: Dashboard Viewer (Edit Mode)

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.

When you hover the mouse pointer on widget-title, title-bar opens up and remains open for a few seconds (if Auto Hide Widget Tile Bar property is checked under Edit Dashboard). Title-bar has following buttons:

- Click  button to reset the widget to its original state.
- 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.

To save the changes made on a dashboard, click Save option.

## Adding a dashboard

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 after clicking the **Add Widget** 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 **Add Widget**. Object Selector area will open where you navigate to the desired folder and select the widget to add.

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.

In case the Report Format is SMART for the added dashboard widget, you can see the following Report Options while viewing the dashboard:

Refresh Data	Refreshes data under dashboard view (reruns query to fetch data from server)			
Export	You can export your report in MS EXCEL, ACROBAT PDF, COMMA SEPARATED, TEXT and MS WORD formats			
	<b>MS EXCEL Options</b>	Remove Blank Rows, Columns	Check/Uncheck	Check = Compact the Excel Report by removing blank rows and columns
		Repeat Page Header and Footer	Check/Uncheck	Check = Repeat column headers on each page  Uncheck = Merge all detail data under a single instance of column headers
	<b>COMMA SEPARATED Options</b>	Separator	Select (under Predefined) or Type yourself (under	Select the separator character to be inserted between




## Adding widget-container

Click **Add Widget Container** option under Add Widget in order to add widget container. You can specify a **Widget Category** for widget container that contains widgets which would rotate automatically or manually at defined interval.

Specify number of Min(s) or Sec(s) under **Default Rotation Interval**. Dashboard would refresh with specified widgets upon the given time interval.

Figure 3: Adding a widget container on dashboard

## Refreshing a dashboard

Clicking **Refresh Now**  refreshes widget data under dashboard view (reruns query to fetch data from server). This can be configured by setting **Refresh Dashboard** property under Navigation > Administration > Configure > Portal Menu > Dashboards > View. By default this property is disabled.

## Saving a dashboard

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

## Removing a dashboard

Click **Delete** on the down arrow of dashboard name to remove that dashboard (in Edit Mode).

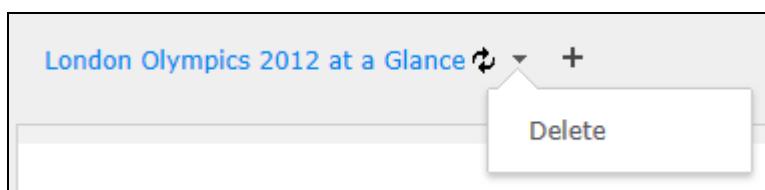


Figure 4: Removing Dashboard

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.

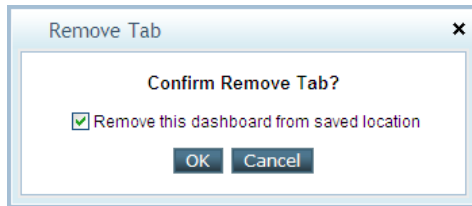


Figure 5: Remove Tab dialog

## 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).

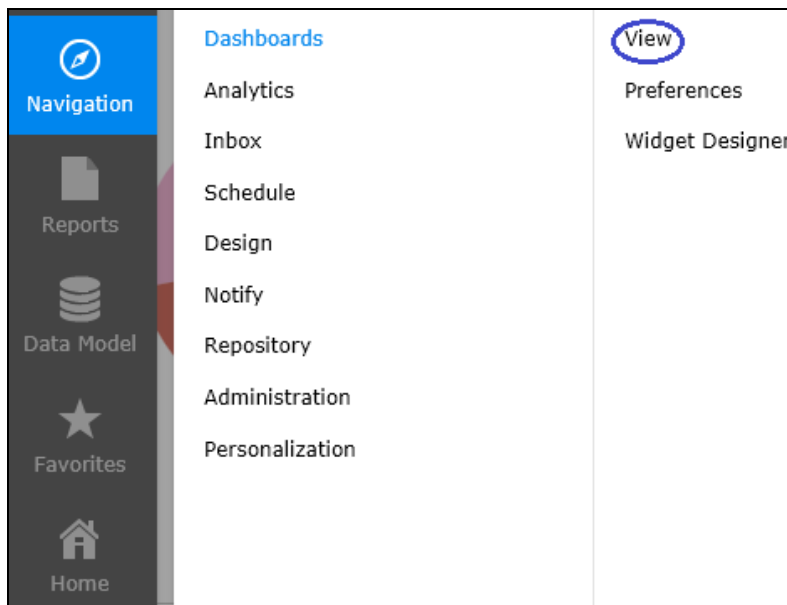


Figure 6: Viewing Dashboard from Viewer

- Click Favorites > select the dashboard > View Dashboard to view the selected dashboard.

If dashboard is added as favorites then only this option will be available.

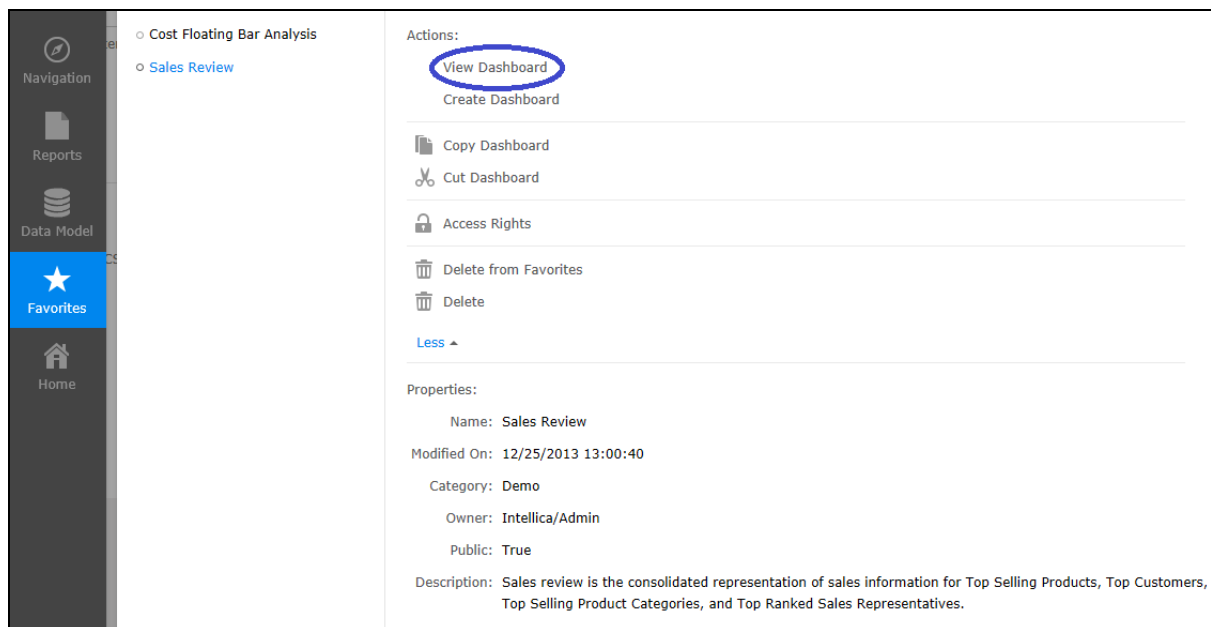


Figure 7: Viewing from Favorites

- Click Data Model > select category > Dashboards > select the dashboard > View Dashboard to view the selected dashboard.

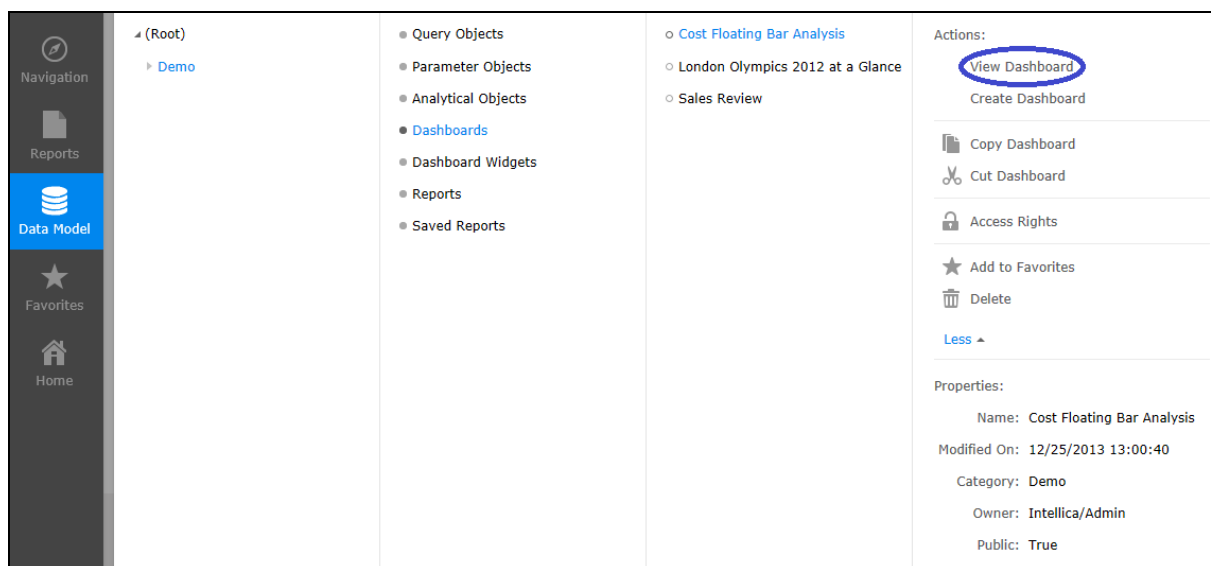


Figure 8: Viewing from Data Model

There are more actions that can be performed if dashboard is viewed from Favorites or Data Model like Create Dashboard, Copy Dashboard, Cut Dashboard, provide Access Rights information, Add to or Delete from Favorites and Delete the dashboard.

## Editing a Dashboard

When you click the **Settings** option, **Properties**, **Layout**, **Information** and **Dashboard Parameters** area of the dashboards opens up.

The screenshot shows a settings window with four tabs: Properties, Layout, Information, and Dashboard Parameters. The Properties tab is active, showing options for Auto Refresh (Every 0 Min(s) or Sec(s)), Select Values While Run, Show Widgets Border, and Auto Hide Widget Title Bar. The Layout tab shows two options: Vertical and Horizontal, each with four numbered widget icons. The Information tab shows a Description field and Scope/Location fields. The Dashboard Parameters tab is empty.

Figure 9: The area that opens when you click Settings

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

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. 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 10: 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 fewer panes, panes (including widgets if any) will be removed from right side.

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

**Information**

**Description**

Dashboard displaying Customer orders and latest updates on Corporate web site.

**Scope** Private

**Location** (Root)

Figure 11: 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.

**Dashboard Parameters**

Parameter Form

☐ All

☒ Select Country

☐ Select Product Type

Max. Columns: 0

Column Width: 200

Prompt

Figure 12: 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 **Max. Columns** and **Column Width** for the parameters to appear on the IPF. The up and down arrows enable to re-position the parameters.

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.

You can open the Parameter Form screen upon clicking **Parameters...** on the down-arrow of the dashboard name.

Margin Velocity 1 ▾ Sales Review1 ▾ GIS Weather Check ▾ +

Parameters...

Delete

Figure 13: Dashboard Parameters

## 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.

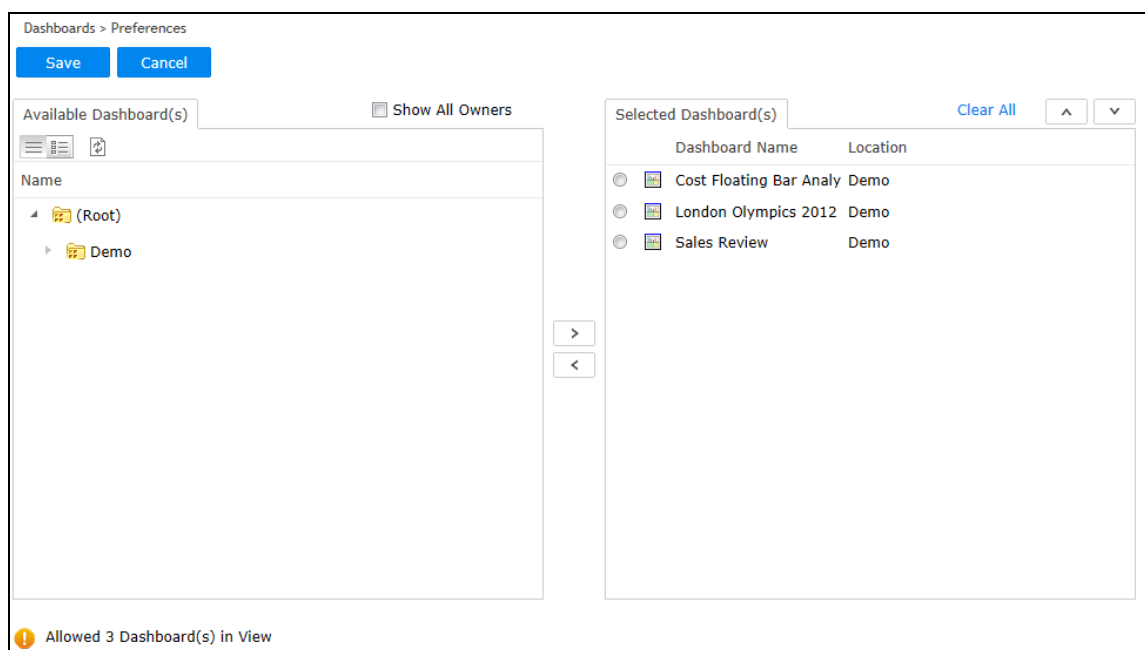





Figure 14: Dashboard Preferences

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.

Click  to get Detailed View of the list. In Detail View, you can also view Id, owner, last modified date, (Public / Private) and Type of the dashboard. Click  to get back to List view.

Refresh List fetches the refreshed list of dashboards from the server.

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  buttons placed on the right of the **Selected Dashboard(s)** list.

**Clear All** removes all the selected dashboards.

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