



entrinsik

The logo features a stylized green plant with a single leaf at the top, a blue stem, and three black seeds. A large, curved green line arches over the seeds, resembling a protective shield or a growing path.

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Chapter 1: Introduction

Introduction

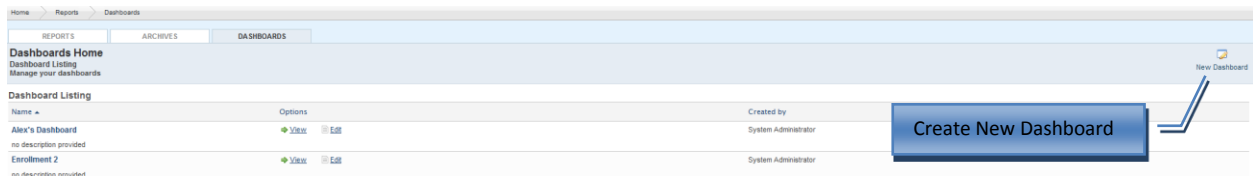
Dashboards allow Informer users to combine data that is extracted from their own datasources by using existing Informer reports in addition to other types of data sources. This feature brings the data together in a dashboard environment, which in turn allows the user to visualize that same data in a variety of ways.



Chapter 2: Creating a Dashboard

Setting up Parameters

To create a new dashboard, login in to Informer and click on the Dashboard tab next to the Archives tab. In the upper right hand corner choose New Dashboard.



It is important to create a relevant name and detailed description of your dashboard. This helps to explain to other viewers how the dashboard is displaying your data.

New Dashboard
Create a new Informer Dashboard

Name Enrollment by Term *

Description This dashboard shows enrollment by term, gender and state.

Save Cancel

New Data Provider

Close

▼ **Filters And Aggregates**
Filtered Data
Filter data from another data provider

▼ **Google Docs**
Spreadsheet
Creates a data provider out of a google worksheet

▼ **Informer**
Informer Report
Creates a data provider out of an Informer Report

Report Launch Audit
An active and complete report execution log

The user has a choice of using previously filtered data, data from a Google docs spreadsheet, or an existing Informer report. There are also options to add other data providers.

To choose an existing Informer report, choose Informer Report and then navigate to the report in the report listings.

Choosing a Data Provider

Choose the data providers by clicking on the cylinder to browse to the correct Informer report or other datasource. It is possible to have multiple data providers.

Using an Existing Informer Report as the Data Provider

Enrollment by Term
Informer Dashboard
This dashboard shows enrollment by term, gender and state.

Save Delete Cancel Options

DATA
Add a new data provider

CANVAS

VISUALIZATIONS
Informer
Query Monitor
Query Statistics
Users

Configure Component
Apply Cancel

Name Enrollment by Term

Report Enrollment by Term

Select Report

Choose the data source from the list of Informer reports available.

Select Informer Report

Apply Cancel

Filter Reports
By Set
All Sets 67
My Favorites 3
By Datasource
All Datasources 67
College ERP 32
College ERP (U2) 33
Informer 2
By Tag
All Tags 67
(empty) 45
Course 4
Demo 2
Enrollment 2

Reports Listing
Search Reports X

Report	Options	Last Executed
Active Employee List - Stored Function Example	Details	Yesterday
Alex's Tuition Balance	Details	3:06 PM
Alex's Tuition Balance - demo	Details	1:55 PM
Alex's Tuition Balance Brad	Details	2:57 PM
City Test	Details	Never
Code File Example	Details	Tuesday
Course Listing	Details	Tuesday
Courses by Student	Details	6/7/12
Employee List	Details	Tuesday
Employee List (U2)	Details	3/1/12
Enrollment	Details	Yesterday
Example Report	Details	2/7/12
Example Report	Details	Never

Name the data provider and then select the report using the browser. If the report has runtime parameters, you can fill in the parameters here, but keep in mind that the dashboard will always reflect those parameters. If the parameters are left blank and you can add filters to the dashboard at a later

time. Check whether or not the users are allowed to view the data on demand. This allows the user to “drill down” and see the underlying data that comprises any of the visualizations. It also allows the user to click “View Data” on the data providers at the Dashboard Viewer screen.

Warning **This option will ignore any security settings the user may have in the rest of the application, and will give access to all the data.**

Check whether or not the users will be allowed to refresh the data on demand. (If the report houses a huge amount of data, it might be more beneficial to uncheck this box and create a schedule for refreshing the data).

Configure Component

Apply Remove Cancel

Name Enrollment by Term

Report Enrollment -RL
Select Report

Runtime Parameters Please select one or more terms
FA2005, FA2006, FA2007, FA2008, FA2009, FA2010

View on Demand ☐ Allow users to view data on demand

Refresh on Demand ☒ Allow users to refresh data on demand

Background Refresh Every 1 days(s)
Configure refresh schedule ... Disable background refresh

Enabling Background Refresh allows the dashboard owner (or user with Edit capabilities).

Selecting a Google Docs Spreadsheet as a Data Provider

Enrollment - RL
Inform Dashboard

Save Close

DATA Enrollment

VISUALIZATION Custom Counter

New Data Provider

Filters And Aggregates
Filtered Data
Filter data from another data provider

Google Docs
Spreadsheet
Creates a data provider out of a google

Click on the Spreadsheet to browse to a Docs spreadsheet.

Configure Component

Apply Remove Cancel

Details Name FA2009 - Top 100

Credentials Username robindamb@gmail.com
Password *****

Document Details Spreadsheet Key or URL
jsdsheet/ccc?key=0ApVm_5GpfAhdDRHNDuT2hLSVRcEg1bnNYSVR/Vmc#gid=0

Worksheet Index
< 1 >

work
Google

Fill in the Name of the datasource. The credentials are your login and password to GoogleDocs. When pasting the URL for the GoogleDocs spreadsheet, delete the #gid=0 off the end of the URL or paste the key part of the URL without the #gid=0 at the end.

Configure Component

Apply

Cancel

Name

Enrollment by Term - RL

Report

Enrollment

Select Report

Runtime Parameters

Please select one or more terms
FA2005, FA2006, FA2007, FA2008, FA2009, FA2010

View on Demand

☒ Allow users to view data on demand

Refresh on Demand

☐ Allow users to refresh data on demand

Background Refresh

Background Refresh is disabled
Enable background refresh...

Scheduling Background Refresh

Schedule the background refresh by setting start date, start time, and the interval to refresh data.

Click Apply.

There are multiple choices for scheduling. For example, it is possible to schedule reports to run daily, monthly, biweekly, or annually. There is also the option to customize your schedule by using Cron expressions. If you choose Custom, and click on the help button, there is a drop down list of sample Cron expressions, however, any Cron expressions can be utilized.

Configure Component

Apply

Cancel

Start Date

6/15/12

Start Time

6:00 AM

Schedule

☐ Fixed Interval

☒ Every 1 day(s)

☒ Daily

☐ Weekly

☐ Monthly

☐ Yearly

☐ Custom

☐ Every Weekday

Configure Component

Apply

Disable

Cancel

Start Date

6/22/12

Start Time

12:00 AM

Schedule

☐ Fixed Interval

☐ Daily

☐ Weekly

☐ Monthly

☐ Yearly

☒ Custom

Custom cron expression:

S M H Day Month DoW [Year]

0 0 12 * * ? Fire at 12pm (noon) every day

0 15 10 ? * * Fire at 10:15am every day

0 15 10 * * ? Fire at 10:15am every day

0 15 10 * * ? Fire at 10:15am every day

0 15 10 * * ? 2005 Fire at 10:15am every day during the year 2005

0 * 14 * * ? Fire every minute starting at 2pm and ending at 2:59pm, every day

0 0/5 14 * * ? Fire every 5 minutes starting at 2pm and ending at 2:55pm, every day

0 0/5 14,18 * * ? Fire every 5 minutes starting at 2pm and ending at 2:55pm, AND fire every 5 minutes starting at 6pm and ending at 6:55pm, every day

0 0.5 14 * * ? Fire every minute starting at 2pm and ending at 2:05pm, every day

0 10,44 14 ? 3 WED Fire at 2:10pm and at 2:44pm every Wednesday in the month of March

0 15 10 ? * MON-FRI Fire at 10:15am every Monday, Tuesday, Wednesday, Thursday and Friday

0 15 10 15 * ? Fire at 10:15am on the 15th day of every month

0 15 10 L * ? Fire at 10:15am on the last day of every month

0 15 10 ? * 6L Fire at 10:15am on the last Friday of every month

0 15 10 ? * 6L 2002-2005 Fire at 10:15am on every last Friday of every month during the years 2002, 2003, 2004 and 2005

0 15 10 ? * 6#3 Fire at 10:15am on the third Friday of every month

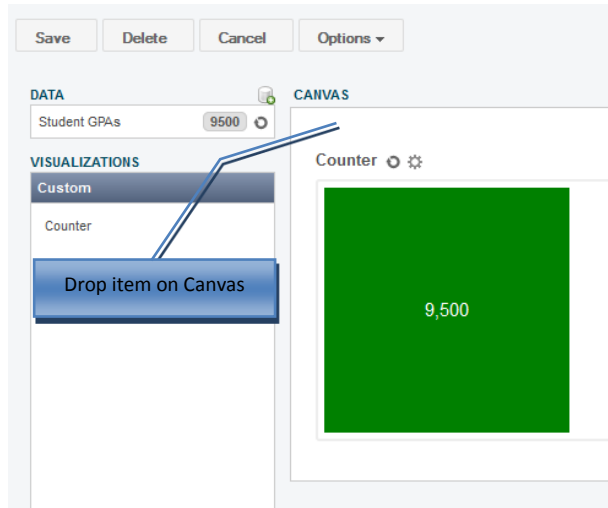
0 0 12 1/5 * ? Fire at 12pm (noon) every 5 days every month, starting on the first day of the month

0 11 11 11 11 ? Fire every November 11th at 11:11am



Chapter 3: Adding Graphs and Charts to your Dashboard

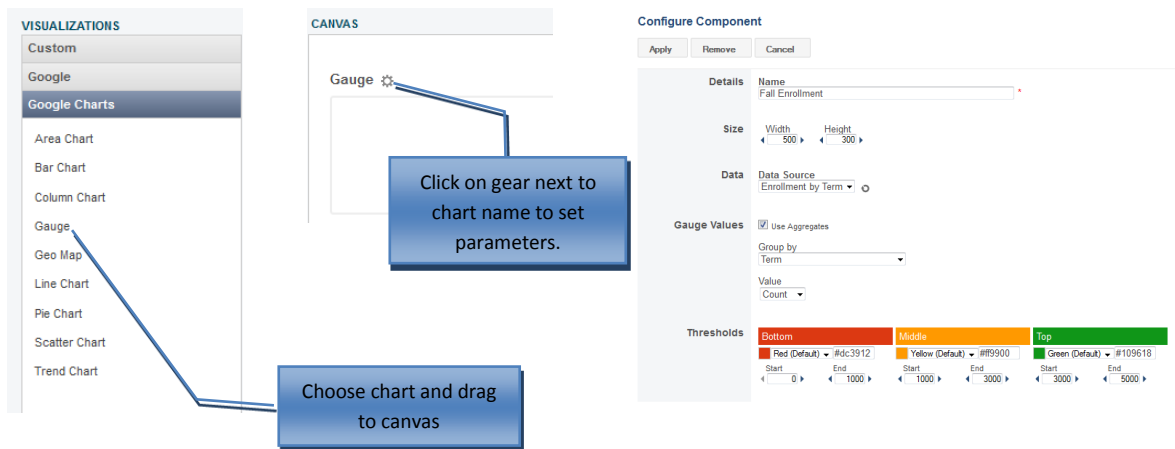
Visualizations



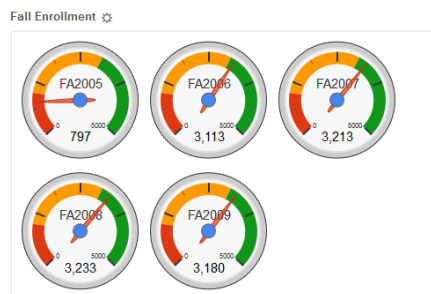
The next step is to create the dashboard by adding different images reflecting the data from the chosen report. Under Visualizations, the choices are Custom, Google, Google Charts, Informer, Input Controls, and Layout. To add a graph or chart to the dashboard, choose a type and drag and drop to the canvas.

The Counter displays the number of records reported from this data provider.

To add another chart to the dashboard, expand the Google Charts tab and drag and drop the chart on to the canvas. Click on the gear next to the chart title to set the parameters for dashboard item.



Set the parameters of the chart, by choosing a title, size and data source. Configuring the gauge requires the user to choose values to group by. You can choose the count, min, max, average, or total value to be displayed on the dashboard. Thresholds can be set to utilize colors to demonstrate bottom, middle, and top numbers.



Bar Graph

Drag and drop the column chart option to the canvas. Fill in the type of bar chart and size parameters. Choose the data source by choosing from the drop down selection next to Source. Then choose your groupings and type of value. The range gives the user the ability to report all values or just a portion such as (Top or Bottom 5). Choose where the legend will be located and give the chart a title and a label on each axis and click apply. Remember to save as you go.

Configure Component

Apply Remove Cancel

Details

Name

Fall Enrollment by Term and Gender

Chart Type

Column

Clustered

Stacked

Size

Width

500

Height

300

Source

Enrollment by Term

Chart Values

Use Aggregates

Group by

Term

Then group by

Gender

Values

Count

Choose type of bar graph and format size

Select data source

Choose how to group data on the graph

Select value type (count, average, min, max)

Decimal Places

0

Range

All

Values

Baseline

Use default baseline (0)

Ordering

Default

Legend

☒ Right
 ☐ Left
 ☐ Top
 ☐ Bottom
 ☐ None

Labels

Title

Fall Enrollment by Term and Gender

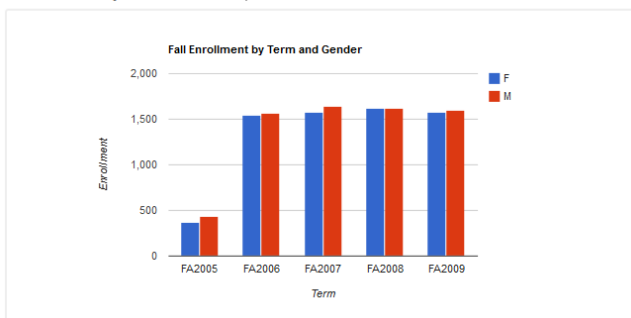
Vertical Axis

Enrollment

Horizontal Axis

Term

Fall Enrollment by Term and Gender



If you click on one of the data bars from the graph, it will return only those records of data. For instance, clicking on the females for FA2006 will return the below data.

FA2006 and only the female gender are in the data results

Fall Enrollment by Term Data

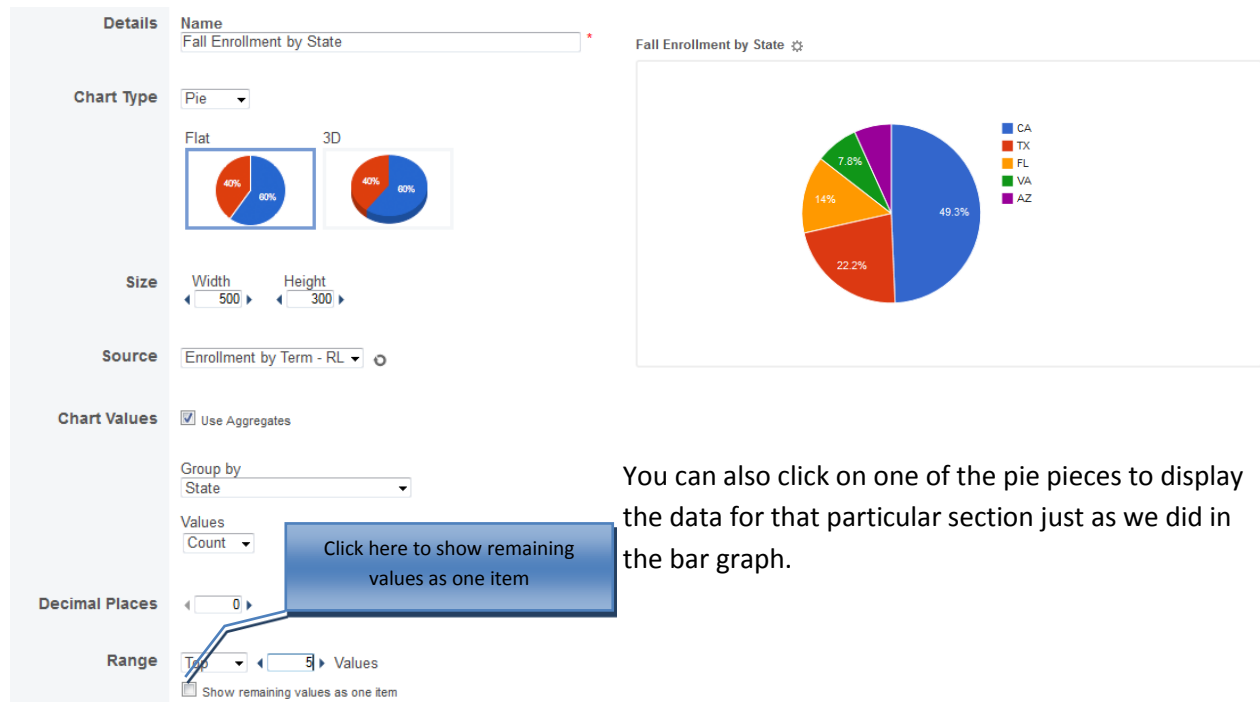
Close

Drag columns here to group

Enrollment Date	Student ID	Student Name	Term	Gender	Street	City	State	Zip Code	Country
May 22, 2006	11	HANES, BRIDGETTE	FA2006	F	40 DRAWBRIDGE STREET	Hayward	CA	57541	US
May 8, 2006	18	BATTLE, JANE	FA2006	F	205 GARLAND LANE	Beaumont	TX	55646	US
Jun 2, 2006	29	MCCANTS, HERMINIA	FA2006	F	339 MERCER GRANT BOULEVARD	Thousand Oaks	CA	86499	US
Jun 27, 2006	40	MARROQUIN, JEWELL	FA2006	F	184 MCINTIRE AVENUE	Concord	CA	54121	US
May 12, 2006	49	WINCHESTER, JAINNA	FA2006	F	444 POINT COMFORT ROAD	Charlotte	NC	52150	US
Jun 28, 2006	62	LYLE, ELIZABETH	FA2006	F	442 STONE FERRIS AVENUE	Fresno	CA	82799	US
May 5, 2006	72	LEWANDOWSKI, MARJORIE	FA2006	F	397 LAUREL HOLLOW DRIVE	Garland	TX	38114	US
Apr 17, 2006	77	MATTINGLY, ANNIE	FA2006	F	410 RAMONA STREET	Overland Park	KS	24027	US
Jun 28, 2006	86	CRAVEN, MARISOL	FA2006	F	133 HEDSPETH AVENUE	Palm Bay	FL	76986	US
Apr 18, 2006	87	BRANT, CHRIS	FA2006	F	108 HORNE CREEK AVENUE	Portland	OR	89485	US
Apr 3, 2006	89	CHONG, ELLA	FA2006	F	444 BARCLAY LANE	Fresno	CA	51759	US
Jun 28, 2006	93	BREWSTER, SHERRY	FA2006	F	290 THE DYKE AVENUE	Palm Bay	FL	21671	US
Jun 8, 2006	97	MCLEMORE, VERONICA	FA2006	F	367 HEWESPOINT COURT	Fort Collins	CO	71335	US

Pie Chart

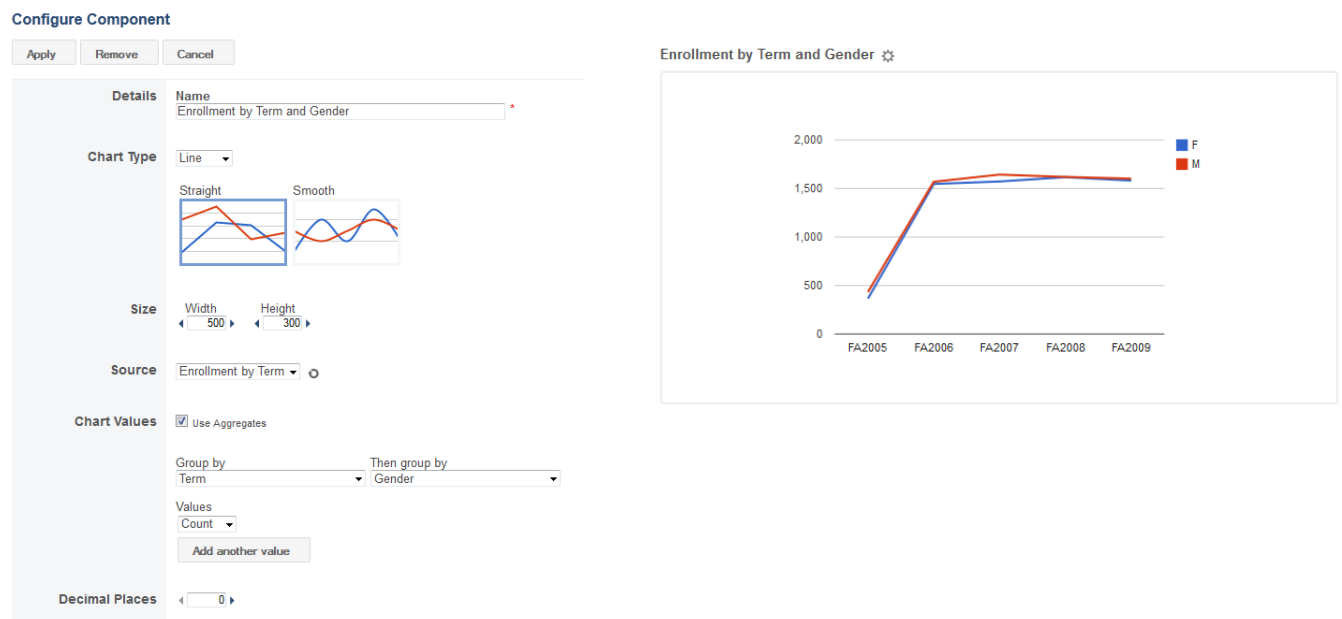
Drag and drop each component and choose parameters. When creating a pie chart, there is a choice to choose a range (Ex. Top 5) and then choose to display the rest of the data in one pie piece or to just choose the range to display. To Show Remaining Values as One Item, click the check box.



You can also click on one of the pie pieces to display the data for that particular section just as we did in the bar graph.

Line Chart

Line chart set up is very similar to the bar graph. Name your graph, choose whether you want straight or smooth transitions, your source, and then select the group by values.



Area Chart

The area chart displays filled in colored areas to show the data. Choose your size and source, along with the Chart values. If you want your chart to reflect any filtered data, be sure to pick the correct source. You can add as many values as you need.

Configure Component

Apply Remove Cancel

Details

Name
Amount Due Versus Amount Paid By Semester *

Chart Type

Area ▾

Overlapping

Stacked

Size

Width
500

Height
300

Source

Term Filter ▾

Chart Values

☒ Use Aggregates

Group by
Term ▾

Then group by
-- ▾

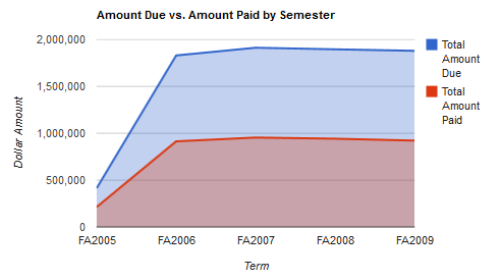
Values

Total ▾ of Amount Due ▾ x

Total ▾ of Amount Paid ▾ x

Add another value

The source is the Term Filter





Chapter 4: Adding Filters

Input Controls – Adding Filters to the Dashboards


Input Controls




- Auto-suggest Box
- Date Range
- Number Range
- Number Slider
- Select Box
- Text Box
- Time Range

Drag and drop the type of input control needed on to the dashboard. It can be placed anywhere on the dashboard.


Auto-Suggest Box

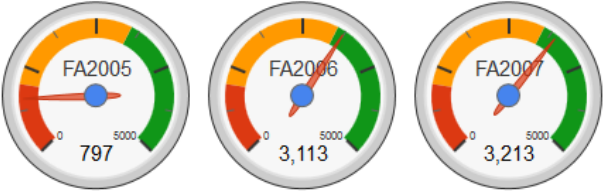
Click on the gear next to the Auto-suggest Box to set the filter criteria

Auto-suggest Box 

Choose a value   

Click the gear to set up the parameters for the filter

Fall Enrollment 



Fill in the filter name, the width, the source for the component, and the column which the report is being filtered by.

Configure Component

Apply

Remove

Cancel

Details

Name


Term Filter

Width

250

Source

Component

Enrollment by Term 

Column

Term

Input Type

Auto-suggest Box

Click on the gear for each individual chart that will be using the new filter.

Configure Component

Apply Remove Cancel

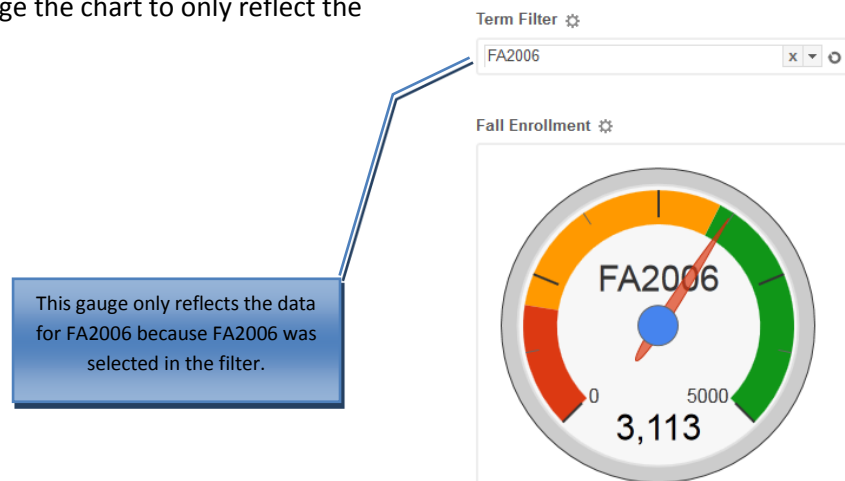
Details Name
Fall Enrollment

Size Width 500 Height 300

Data Data Source
Term Filter

Choose the filter as the data source.

After choosing a filter, it will change the chart to only reflect the filtered data.



Select Box

Another type of input control is the Select Box. This displays a drop down list of available values to use within the filter. As seen below, it is necessary to build the table used for the Select Box menu. The steps to set up the filter include naming the filter, choosing the width, picking the source and the column where the data resides, and then building the table.

Configure Component

Apply Remove Cancel

Details Name
Term Filter

Width 250

Source Component
Enrollment by Term

Column Term

Input Type Select Box

Fill in values and display text. The display text can be different than the value.

Value	Displayed Text
FA2005	FA2005
FA2006	FA2006
FA2007	FA2007
FA2008	FA2008
FA2009	FA2009

Term Filter ⚙

Select Term

Select Term

FA2005

FA2006

FA2007

FA2008

FA2009

FA2005

0 5000

797

FA2006

0 5000

3,113

Date Range

To create a date range filter, drag and drop that choice from the Input Controls list to the canvas. For the source, you may want to choose the original report that you are extracting data from or you can choose to use another filter. If you choose the source to be another filter, the data will be filtered by the source component assigned and then through the filter you are creating. It is also necessary to change each of the charts to point to the correct source.

Configure Component

Apply

Remove

Cancel

Details

Name

Enrollment Date Range

Width

◀ 250 ▶

Source

Component

Term Filter ▼

Column

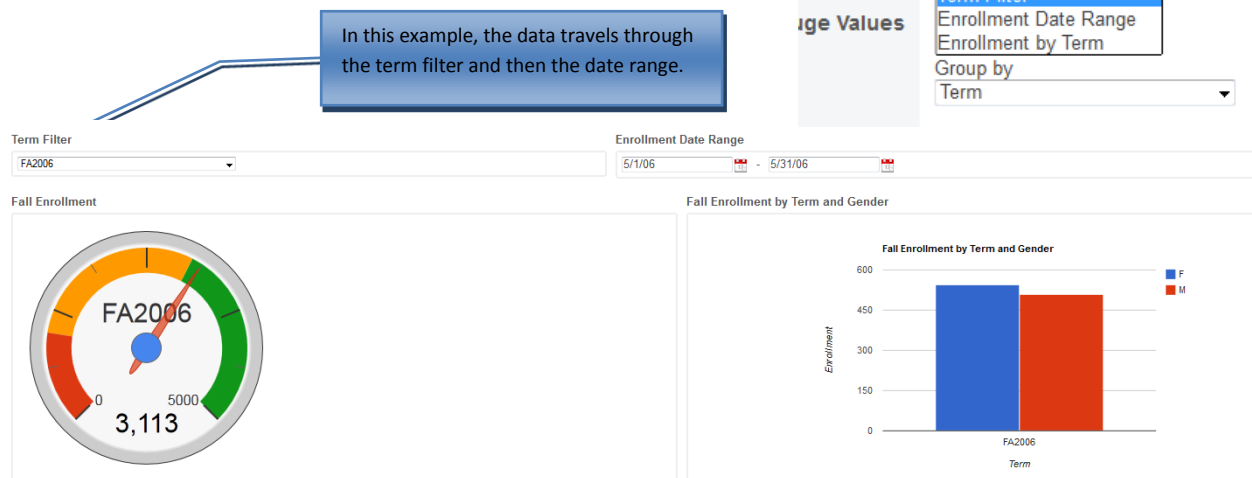
Enrollment Date ▼

Input Type

Date Range ▼

The Enrollment Date Range filter is based off the data from the term filter.

In this example the term filter is identified as the source for the Fall Enrollment gauge visualization. When the filter is used the gauge will only show the filtered data results.



Layout

The layout tab allows you to customize the look of your dashboard. You can insert HTML code to create a web design with your dashboard, or you can import images such as logos and pictures. As with the other elements, you drag and drop the menu item of your choice to the canvas.

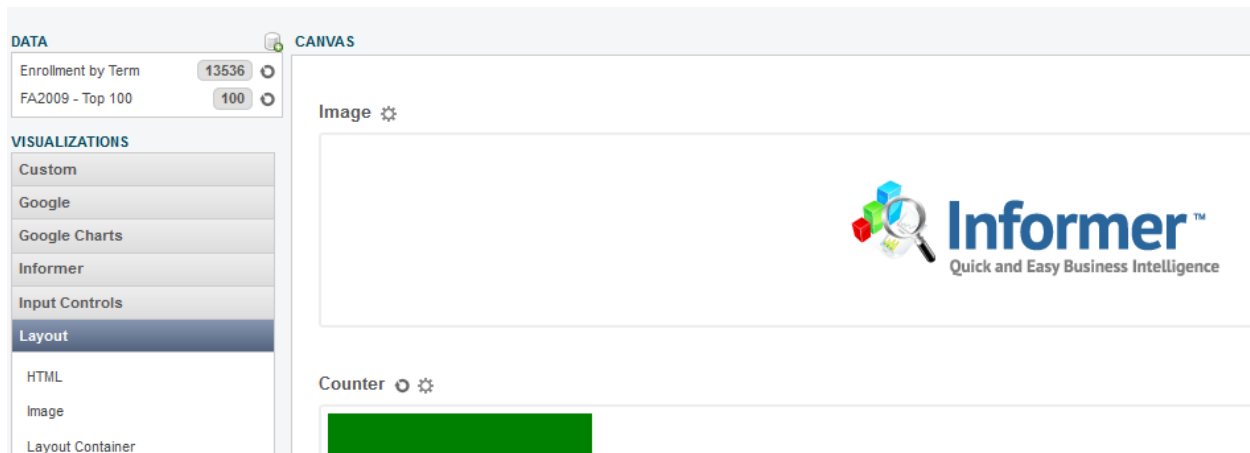
The screenshot shows the Informer dashboard layout editor. On the left, the 'DATA' section displays 'Enrollment by Term' with a value of 13536 and 'FA2009 - Top 100' with a value of 100. The 'VISUALIZATIONS' section lists various options, with 'Layout' selected. The 'CANVAS' area shows a green square representing the 'Image' component, with a 'Counter' component below it displaying '13,536'. A blue callout box points to the 'Image' component, stating: 'Drag and drop the image selection to the canvas. To insert the image, click on the gear to open configuration component.' The 'Configure Component' dialog is open, showing the 'Details' tab with the 'Name' field set to 'Image'. The 'Upload' section has a 'File' field with a 'Browse...' button and a '750 KB' limit. The 'Size' section has radio buttons for 'Actual size' (selected) and 'Custom size', with 'Width' and 'Height' fields set to '0 px'.

Browse to the image you would like to upload.

The screenshot shows the Informer dashboard layout editor. The 'Image' component in the 'CANVAS' area now displays the Informer logo, which includes a magnifying glass icon and the text 'Informer™ Quick and Easy Business Intelligence'. The 'Counter' component below it is still present and displays '13,536'.

The layout container allows you to group graphs together in a container. Drag and drop the layout container on the canvas and then drag and drop any visualizations into the container. Click on the gear next to Container 2 to name the component.

The screenshot shows the Informer dashboard layout editor. The 'Container 2' component is visible, containing a bar chart titled 'Fall Enrollment by Term and Gender' and a gauge chart titled 'Fall Enrollment'. The 'Configure Component' dialog is open, showing the 'Details' tab with the 'Name' field set to 'Container 2'.



Editing an Existing Dashboard

To edit an already existing dashboard, click on gear in the upper left hand corner of the dashboard located below the title of the dashboard.

The screenshot shows the 'Enrollment - RL Informer Dashboard' Control Panel. Callout boxes provide instructions for various controls:

- Click Edit to edit dashboard elements:** Points to the 'Edit' button in the Control Panel.
- Enable update and choose time increments:** Points to the 'Enable Auto Update' checkbox and the 'Every 5 Seconds' dropdown in the AUTO UPDATE section.
- Click on gear to edit an existing dashboard:** Points to the gear icon in the top left corner of the dashboard.
- Choose Embed to embed links into other websites or documents:** Points to the 'Embed' button in the Control Panel.
- Refresh Now to refresh the data on demand:** Points to the 'Refresh Now' button in the DATA PROVIDERS section.
- Add a new filter on demand:** Points to the 'Add a Filter' button in the DATA PROVIDERS section.

The Control Panel includes buttons for 'Edit', 'Embed', and 'Refresh'. The AUTO UPDATE section has a checkbox for 'Enable Auto Update' and a dropdown for 'Every 5 Seconds'. The DATA PROVIDERS section shows 'Enrollment by Term' with 13536 rows, a 'Refresh Now' button, and an 'Add a Filter' button.

Once you are on the Control Panel, you click Edit to The visualization parameters within the dashboard. To enable the auto update and set the time increments for which the data will update, check the box that enables Auto Update.

Embed a Link

To embed a link, click on the embed button and copy the link to a search engine or into an email for other users to be able have direct access to the dashboard.

To embed the link into another website or SharePoint site, copy and paste the HTML code. If you would like the viewer to have viewer controls click the Options box.

The image shows a 'Configure External Link' dialog box on the left and a web browser window on the right. A blue callout box points from the 'Direct Link' field in the dialog to the browser's address bar.

Configure External Link

Close

Options ☐ Include viewer controls

Width: 800 Height: 600

Code

Direct Link
<http://alamance.8080/education/DashboardViewer.html?embedToken=a0f5c9c6-7fc1-4e23-9bdf-b40e06792fa5>

Paste HTML to Embed

```
<iframe style='width: 800px; height:600px' src='http://alamance.8080/education/DashboardViewer.html?embedToken=a0f5c9c6-7fc1-4e23-9bdf-b40e06792fa5'></iframe>
```

Copy and paste this link into a document, an email, or open in a web browser.

Google - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Informer Web Reporting

google.com <http://alamance.8080/education/DashboardViewer.html?embedToken=a0f5c9c6-7fc1-4e23-9bdf-b40e06792fa5>