©2012 Entrinsik, Inc.

Table of Contents

Chapter 1: Introduction 3

Introduction 4

Chapter 2: Creating a Dashboard 5

Setting up Parameters 6

Choosing a Data Provider 7

..... 8

Scheduling Background Refresh 9

Chapter 3: Adding Graphs and Charts to your Dashboard 10

Visualizations 11

Bar Graph 12

Pie Chart 13

Line Chart 13

Area Chart 14

Chapter 4: Adding Filters 15

Input Controls – Adding Filters to the Dashboards 16

Auto-Suggest Box 16

Select Box 17

Date Range 18

Layout 19

..... 20

Editing an Existing Dashboard 20

Embed a Link 21

Chapter 1: Introduction

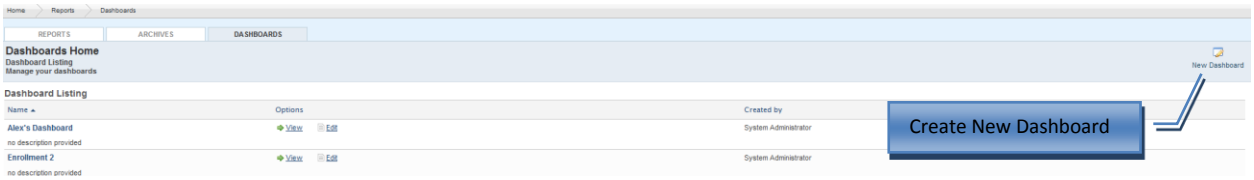
Introduction

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.

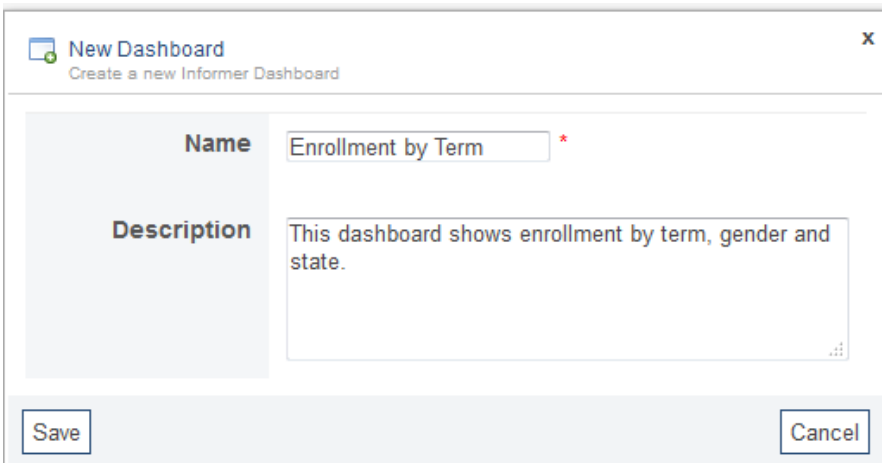
Chapter 2: Creating a Dashboard

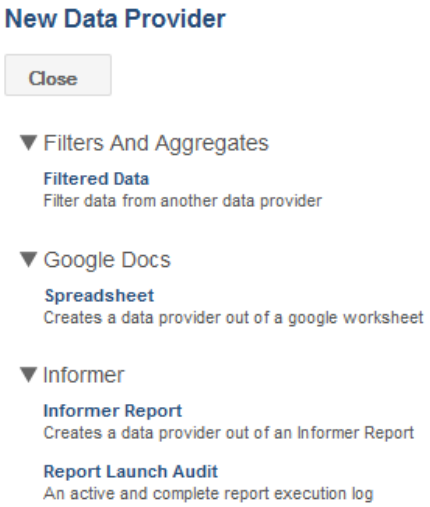
Setting up Parameters

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.





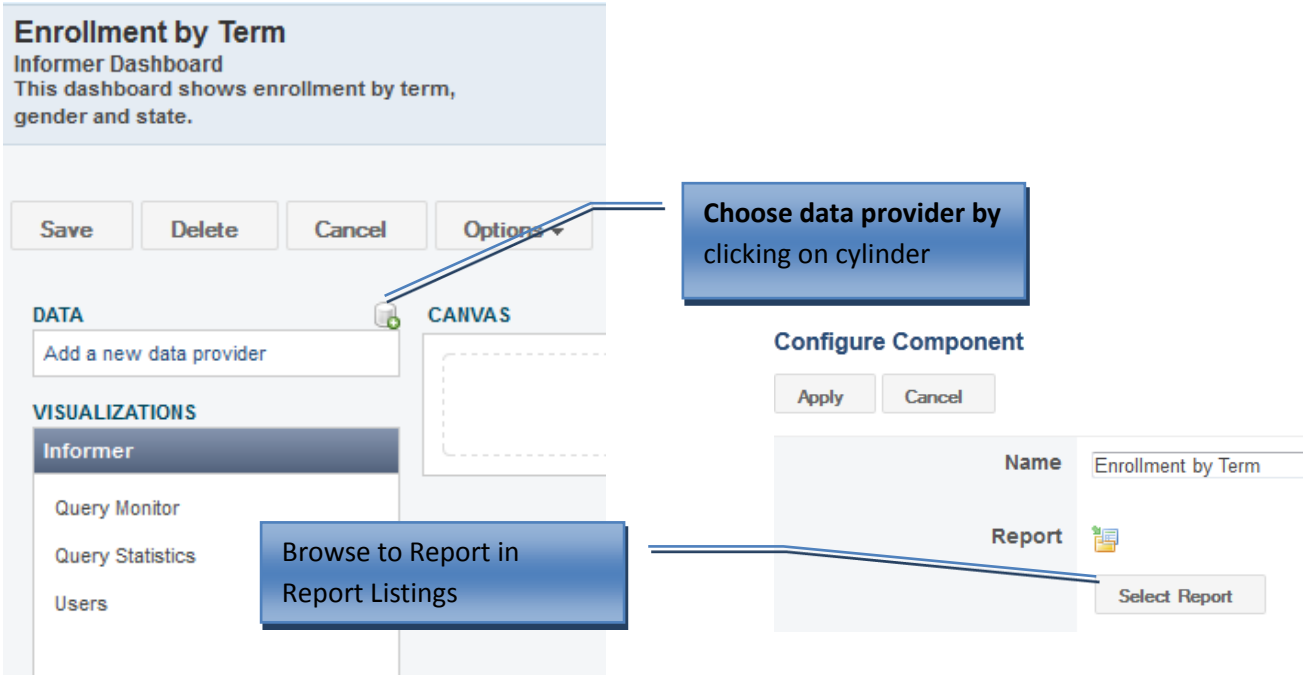
The user has a choice of using previously filtered data, data from a Google docs spreadsheet, or an existing Informer report. There are also options to add other data providers.

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

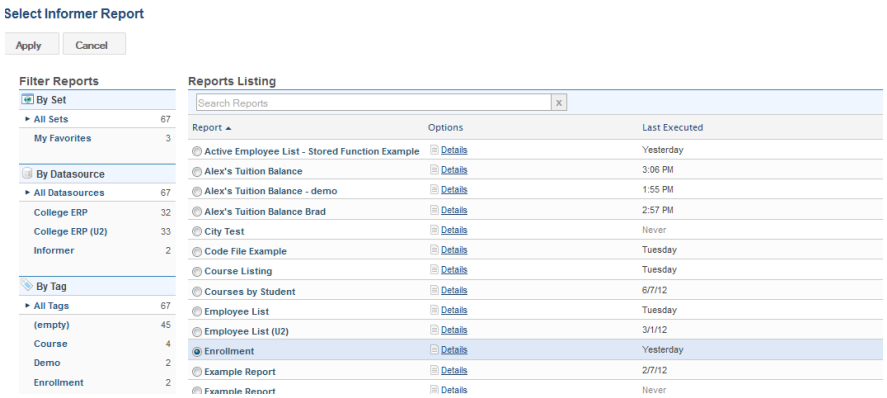
Choosing a Data Provider

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



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

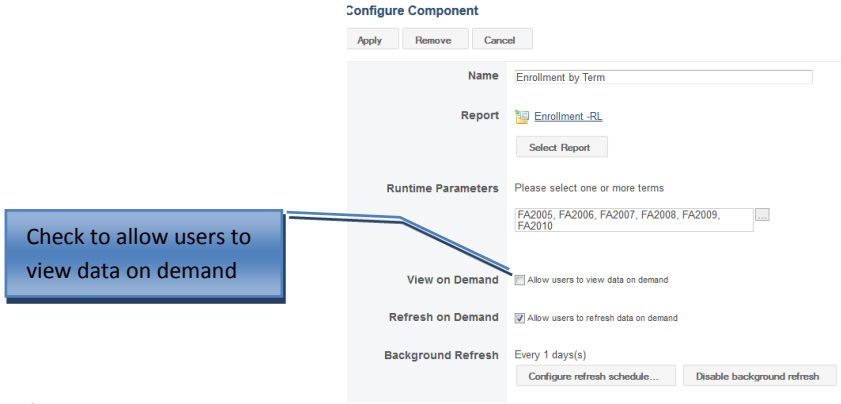


Name the data provider and then select the report using the browser. If the report has runtime parameters, you can fill in the parameters here, but keep in mind that the dashboard will always reflect those parameters. If the parameters are left blank and you can add filters to the dashboard at a later

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.

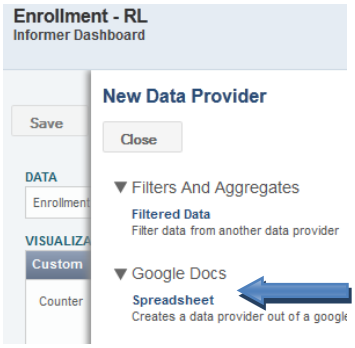
Warning **This option will ignore any security settings the user may have in the rest of the application, and will give access to all the data.**

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).

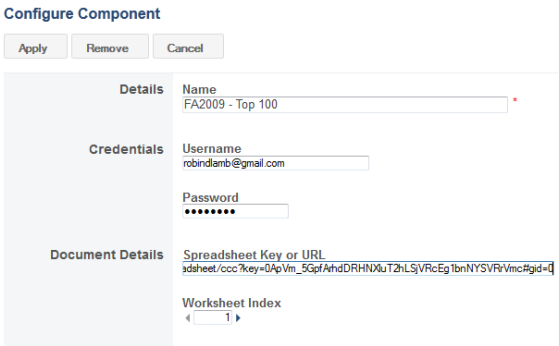


Enabling Background Refresh allows the dashboard owner (or user with Edit capabilities).

Selecting a Google Docs Spreadsheet as a Data Provider



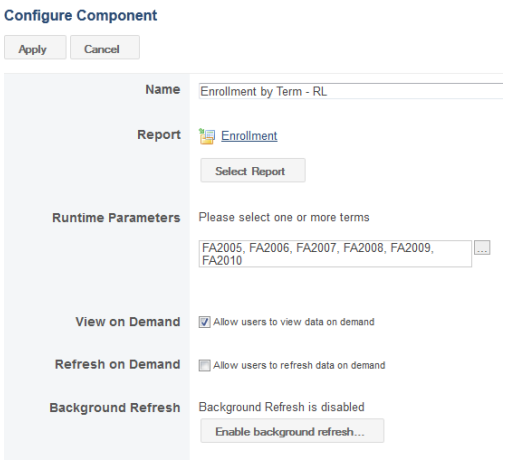
Click on the Spreadsheet to browse to a Docs spreadsheet.



work

Google

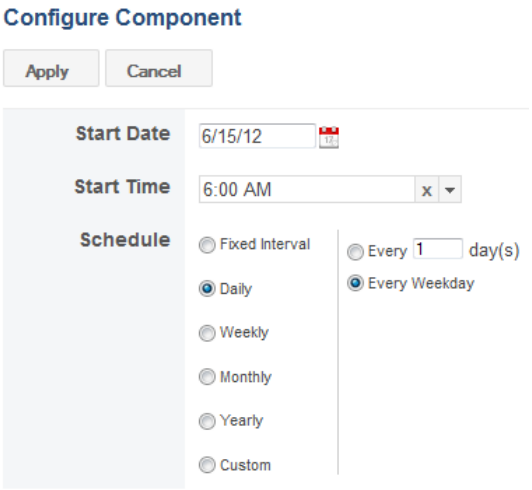
Fill in the Name of the datasource. The credentials are your login and password to GoogleDocs. When pasting the URL for the GoogleDocs spreadsheet, delete the #gid=0 off the end of the URL or paste the key part of the URL without the #gid=0 at the end.

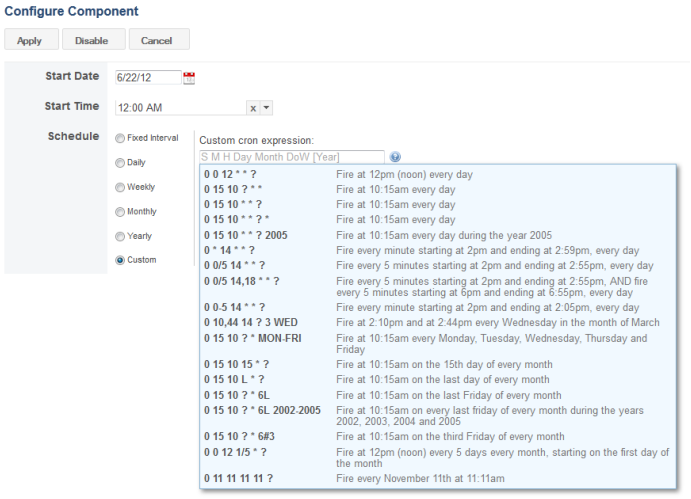


Scheduling Background Refresh

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

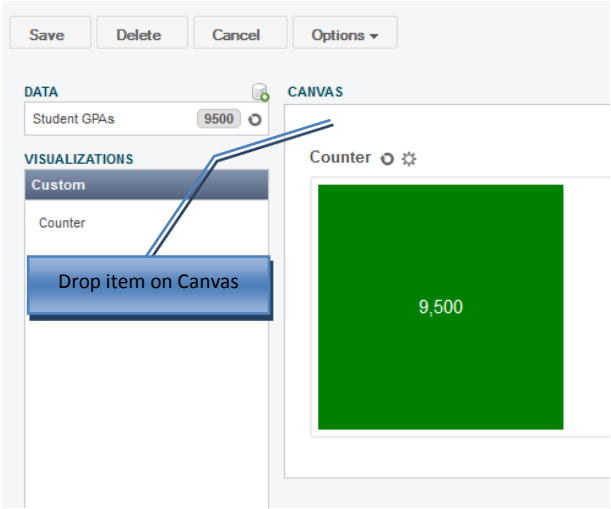
There are multiple choices for scheduling. For example, it is possible to schedule reports to run daily, monthly, biweekly, or annually. There is also the option to customize your schedule by using Cron expressions. If you choose Custom, and click on the help button, there is a drop down list of sample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





Chapter 3: Adding Graphs and Charts to your Dashboard

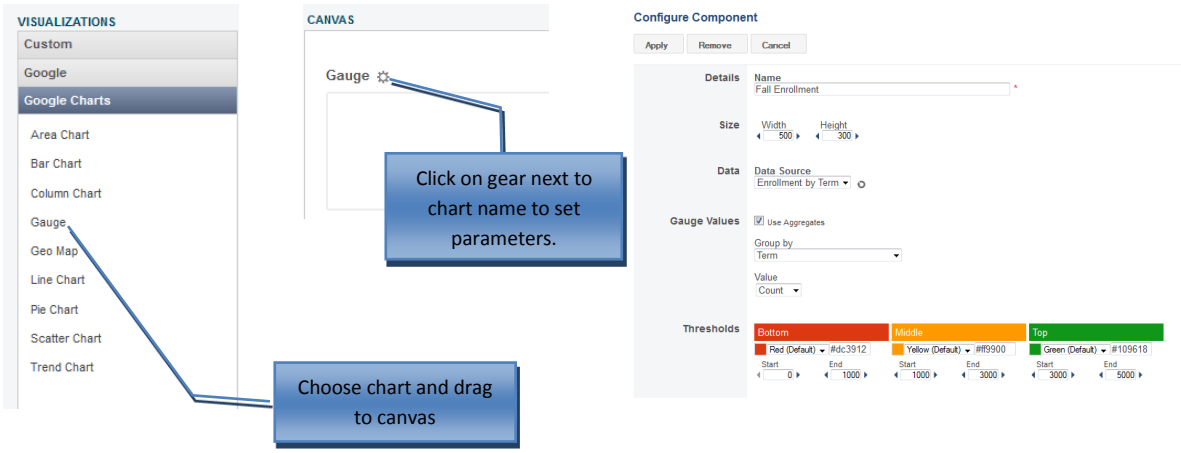
Visualizations



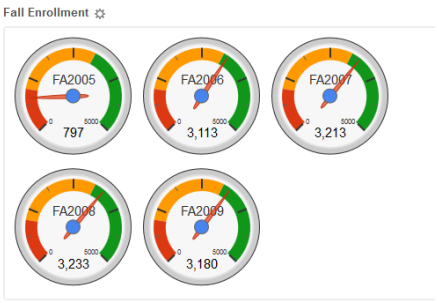
The next step is to create the dashboard by adding different images reflecting the data from the chosen report. Under Visualizations, the choices are Custom, Google, Google Charts, Informer, Input Controls, and Layout. To add a graph or chart to the dashboard, choose a type and drag and drop to the canvas.

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.

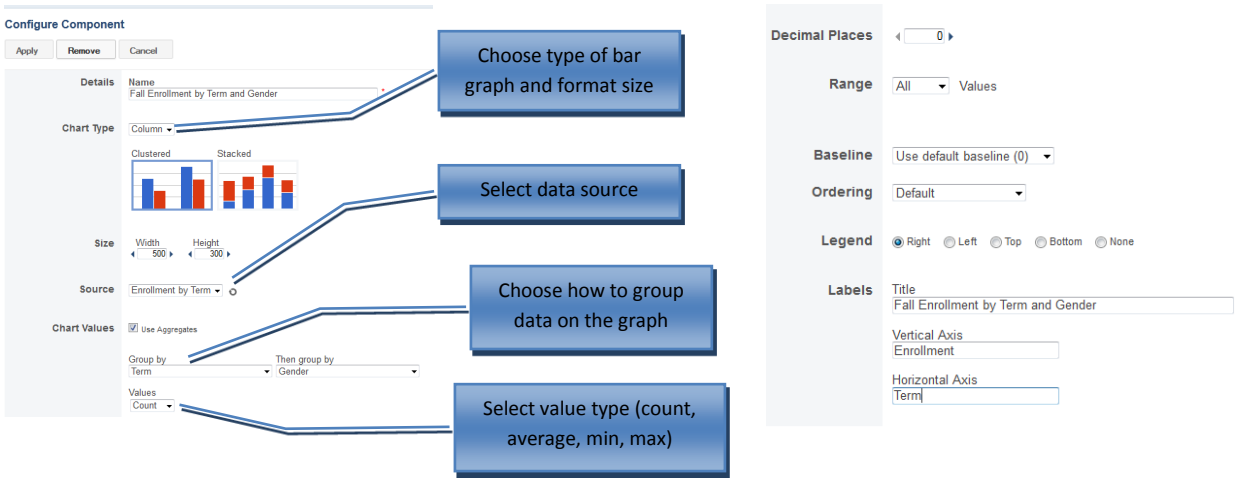


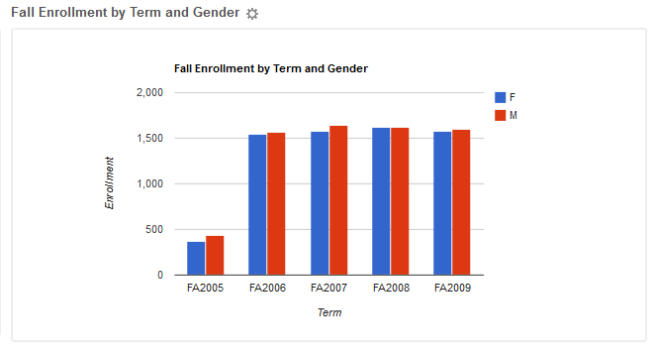
Set the parameters of the chart, by choosing a title, size and data source. Configuring the gauge requires the user to choose values to group by. You can choose the count, min, max, average, or total value to be displayed on the dashboard. Thresholds can be set to utilize colors to demonstrate bottom,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



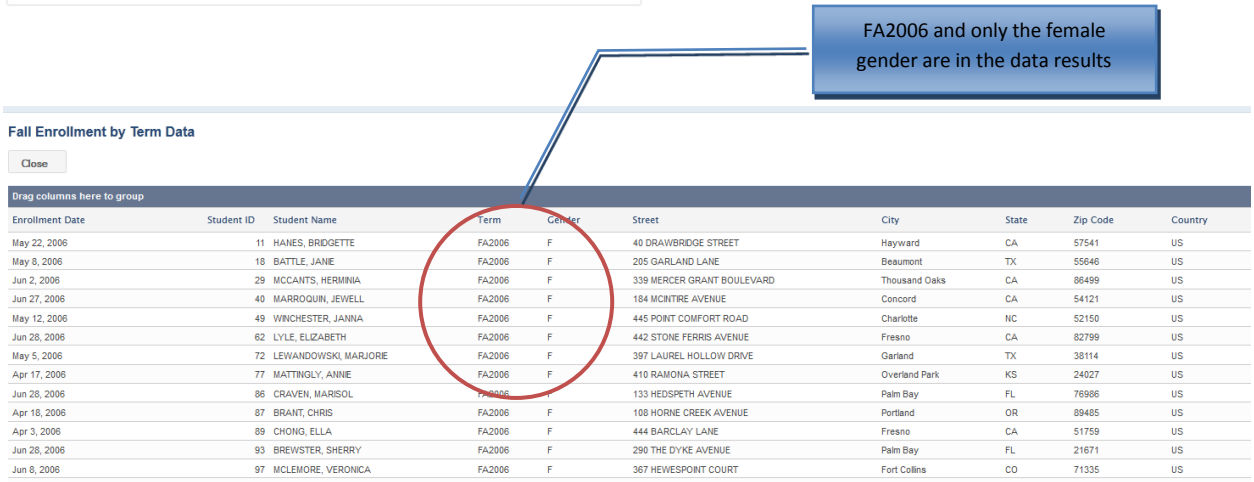
Bar Graph

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.





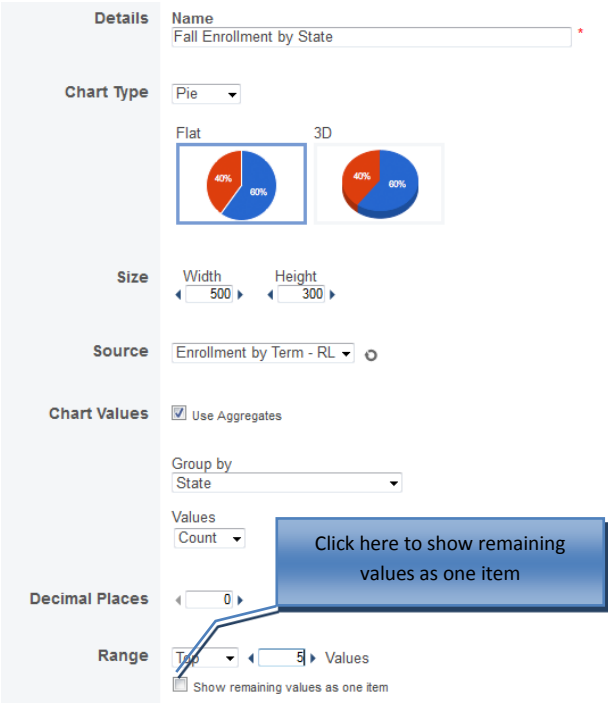
If you click on one of the data bars from the graph, it will return only those records of data. For instance, clicking on the females for FA2006 will return the below data.

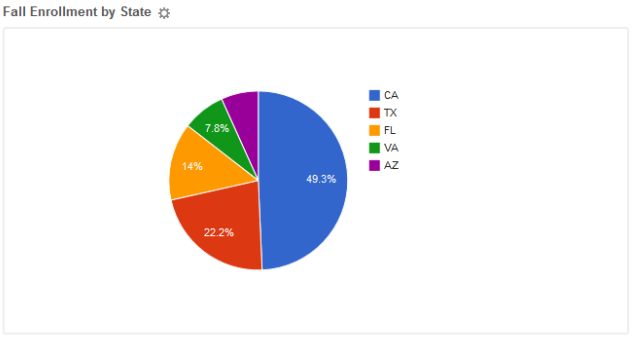


Enrollment Date	Student ID	Student Name	Term	Gender	Street	City	State	Zip Code	Country
May 22, 2006	11	HANES, BRIDGETTE	FA2006	F	40 DRAWBRIDGE STREET	Hayward	CA	57541	US
May 8, 2006	18	BATTLE, JANIE	FA2006	F	205 GARLAND LANE	Beaumont	TX	55646	US
Jun 2, 2006	29	MCCANTS, HERMINIA	FA2006	F	339 MERCER GRANT 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, JANNA	FA2006	F	445 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.

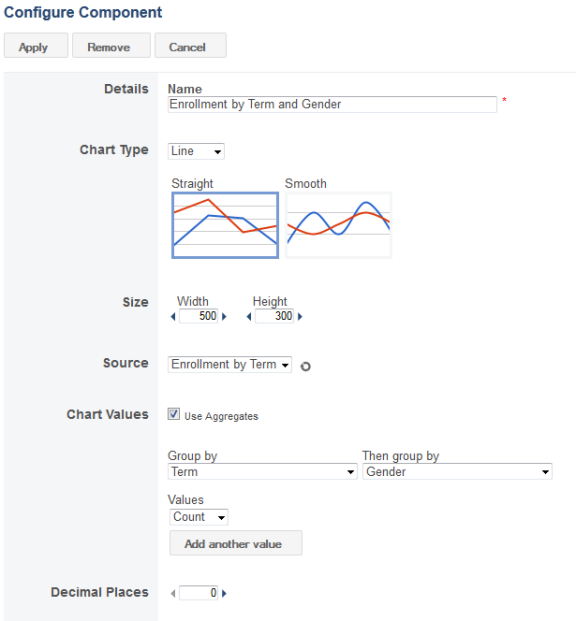


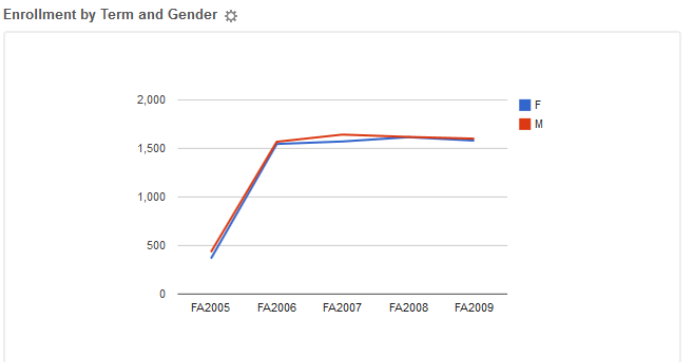


You can also click on one of the pie pieces to display the data for that particular section just as we did in the bar graph.

Line Chart

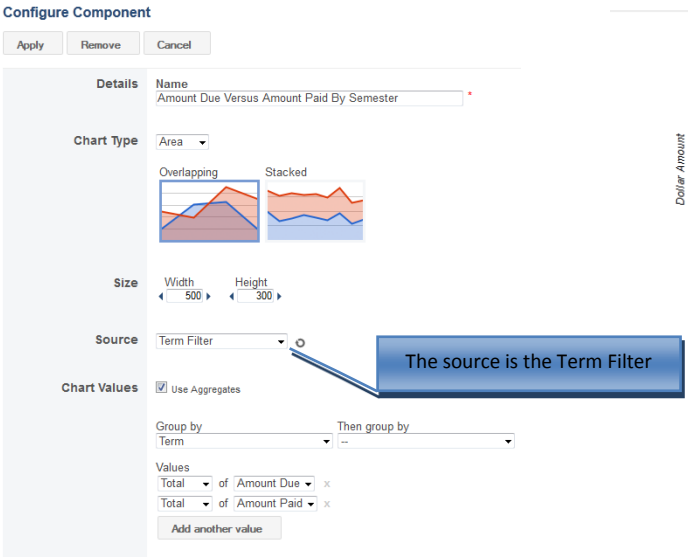
Line chart set up is very similar to the bar graph. Name your graph, choose whether you want straight or smooth transitions, your source, and then select the group by values.

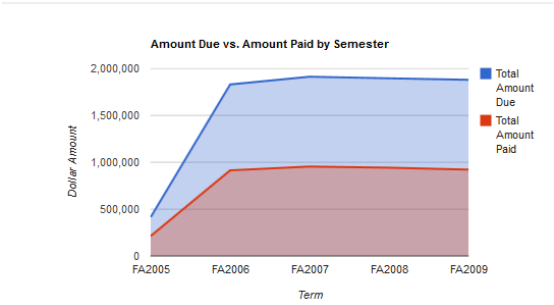




Area Chart

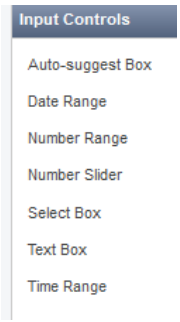
The area chart displays filled in colored areas to show the data. Choose your size and source, along with the Chart values. If you want your chart to reflect any filtered data, be sure to pick the correct source. You can add as many values as you need.





Chapter 4: Adding Filters

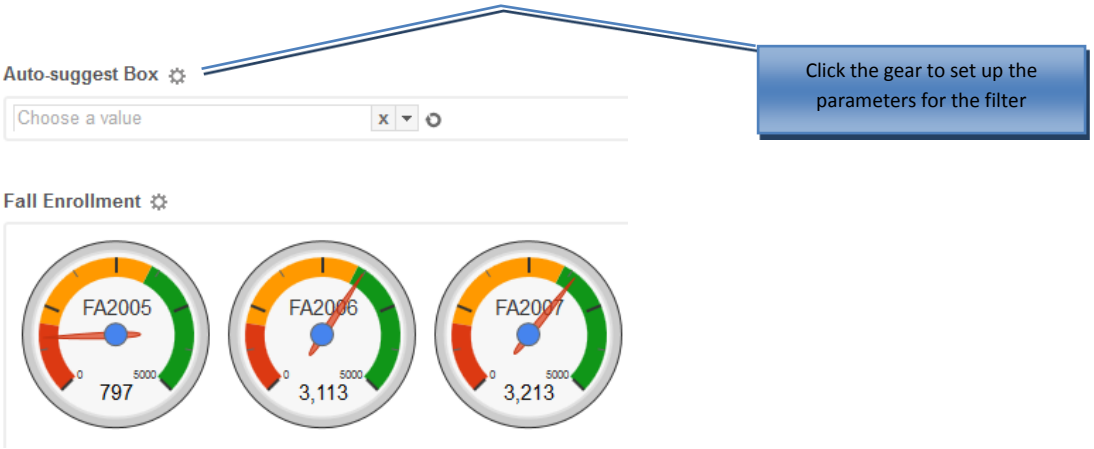
Input Controls – Adding Filters to the Dashboards



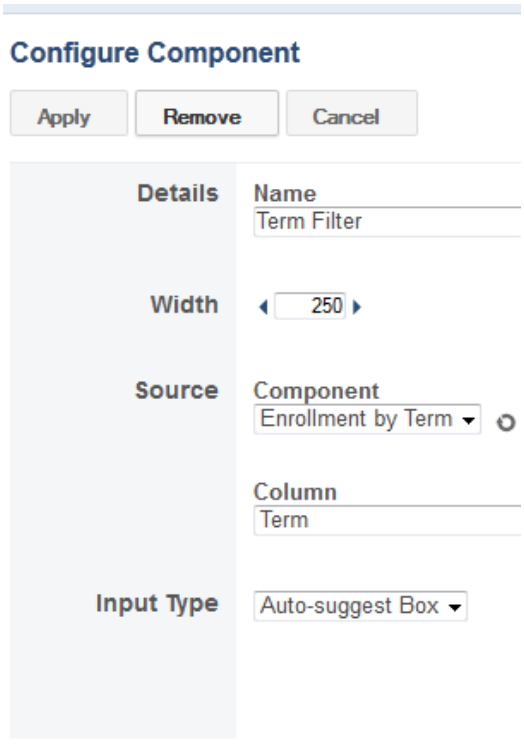
Drag and drop the type of input control needed on to the dashboard. It can be placed anywhere on the dashboard.

Auto-Suggest Box

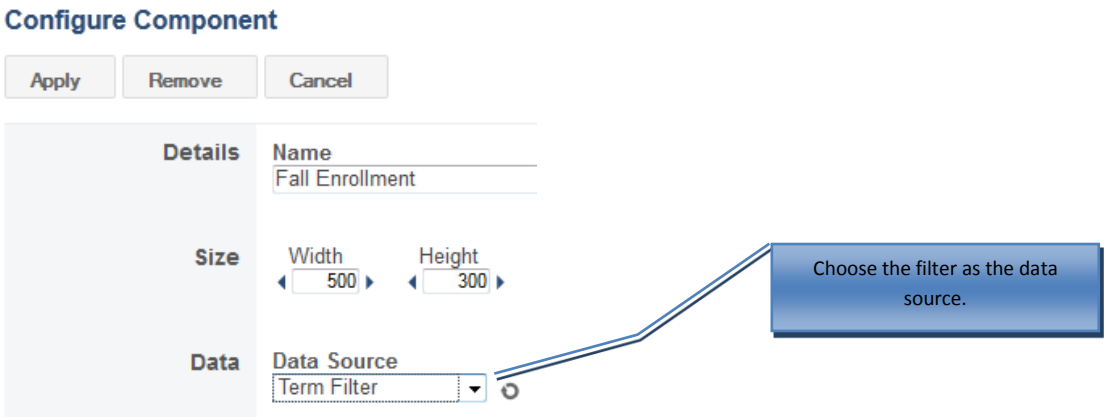
Click on the gear next to the Auto-suggest Box to set the filter criteria



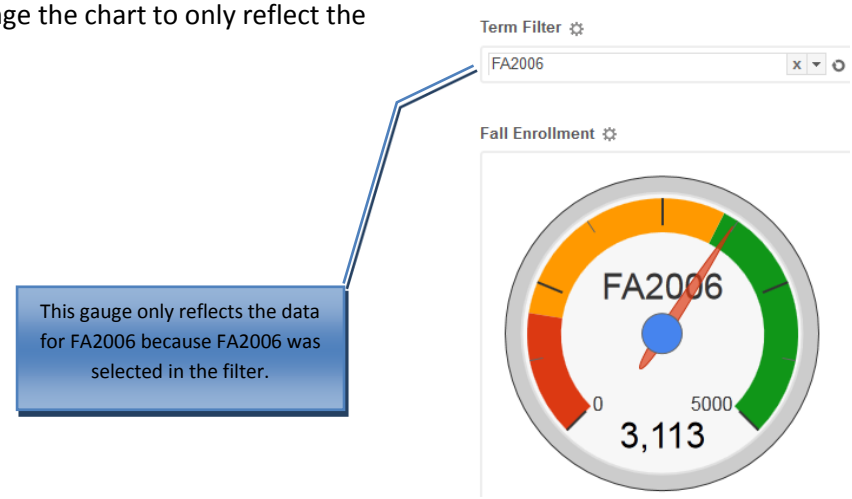
Fill in the filter name, the width, the source for the component, and the column which the report is being filtered by.



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

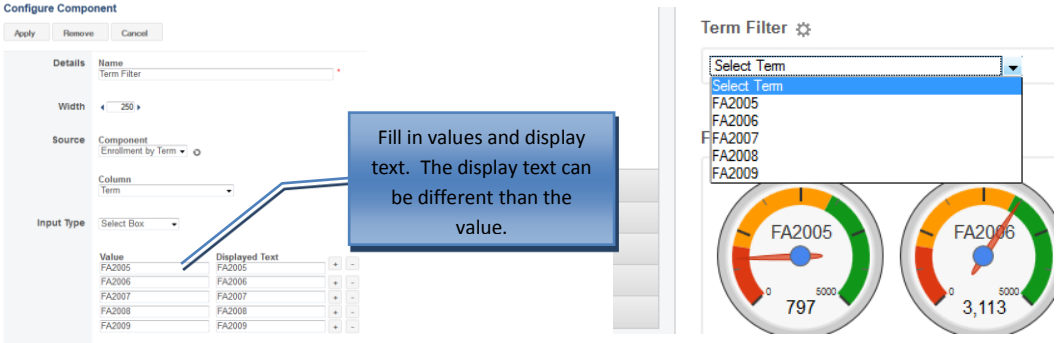


After choosing a filter, it will change the chart to only reflect the filtered data.



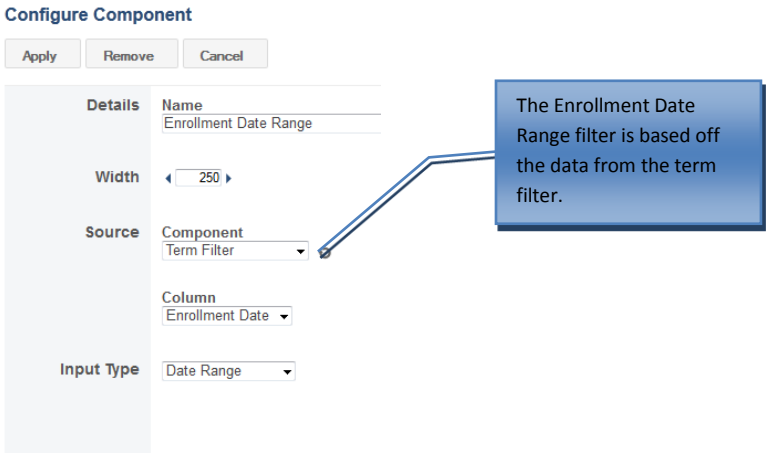
Select Box

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.

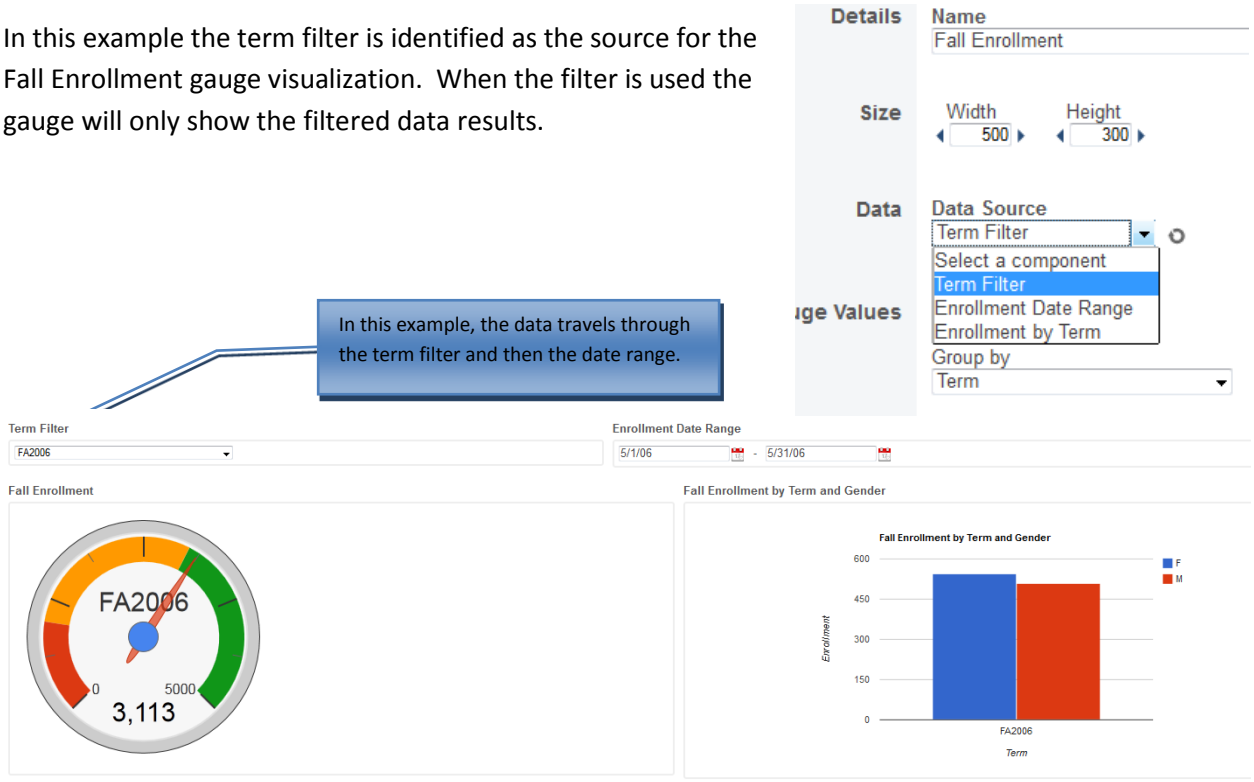


Date Range

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.

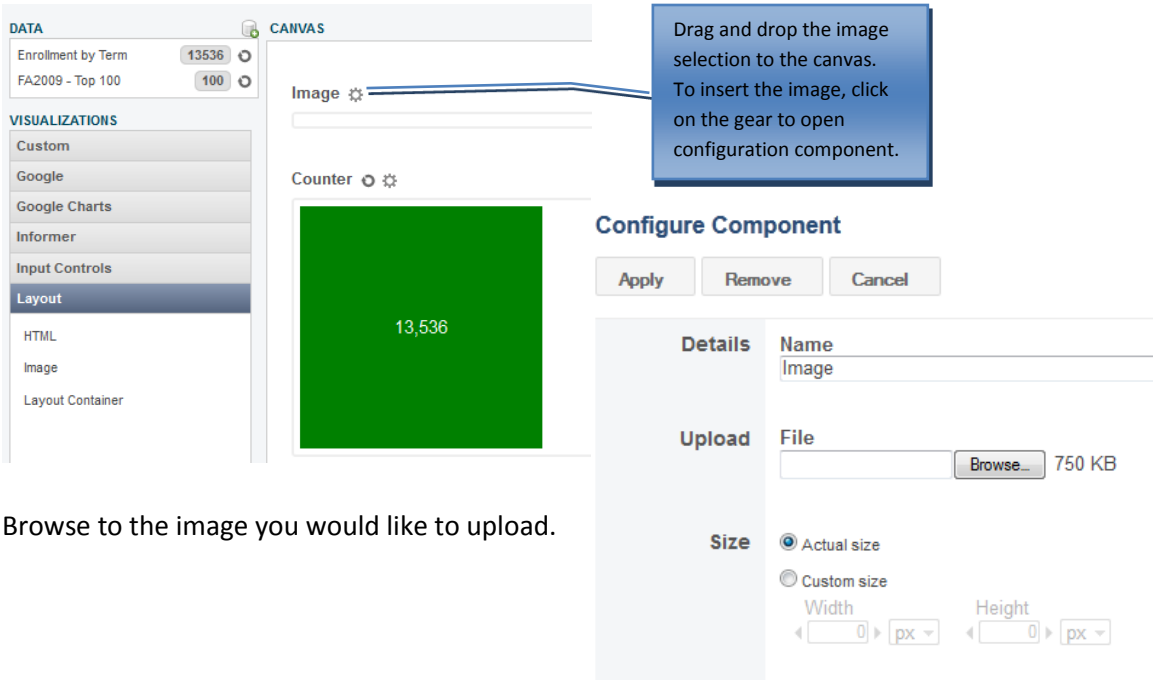


In this example the term filter is identified as the source for the Fall Enrollment gauge visualization. When the filter is used the gauge will only show the filtered data results.

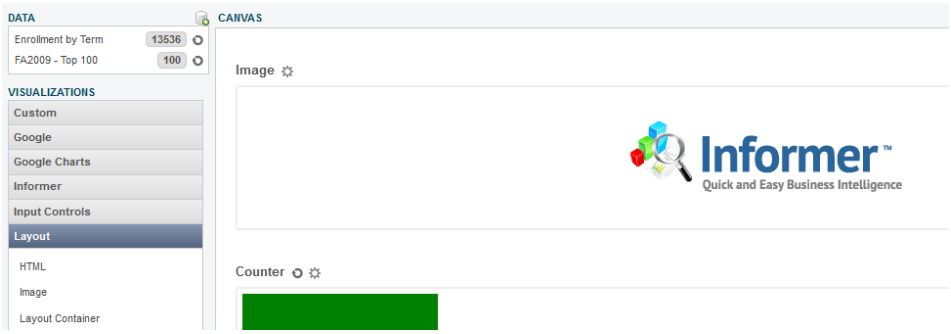


Layout

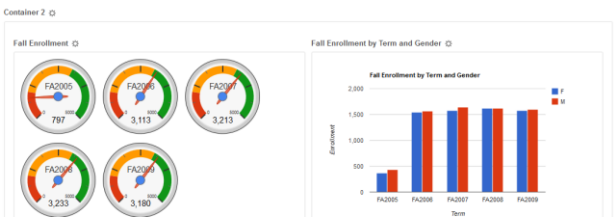
The layout tab allows you to customize the look of your dashboard. You can insert HTML code to create a web design with your dashboard, or you can import images such as logos and pictures. As with the other elements, you drag and drop the menu item of your choice to the canvas.

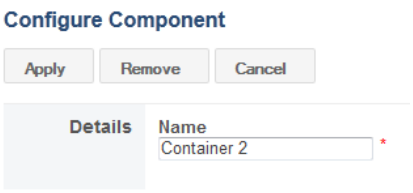


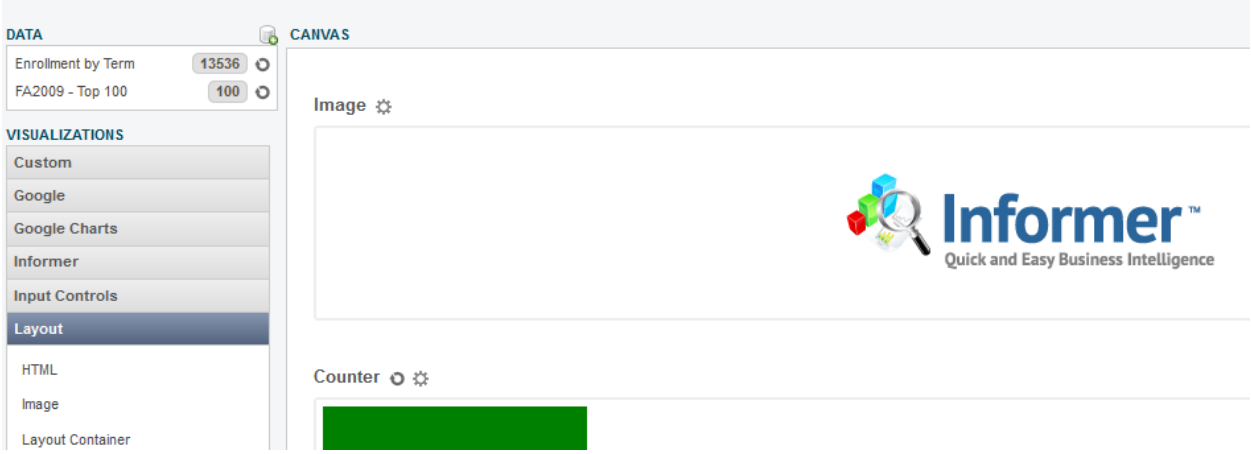
Browse to the image you would like to upload.



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.

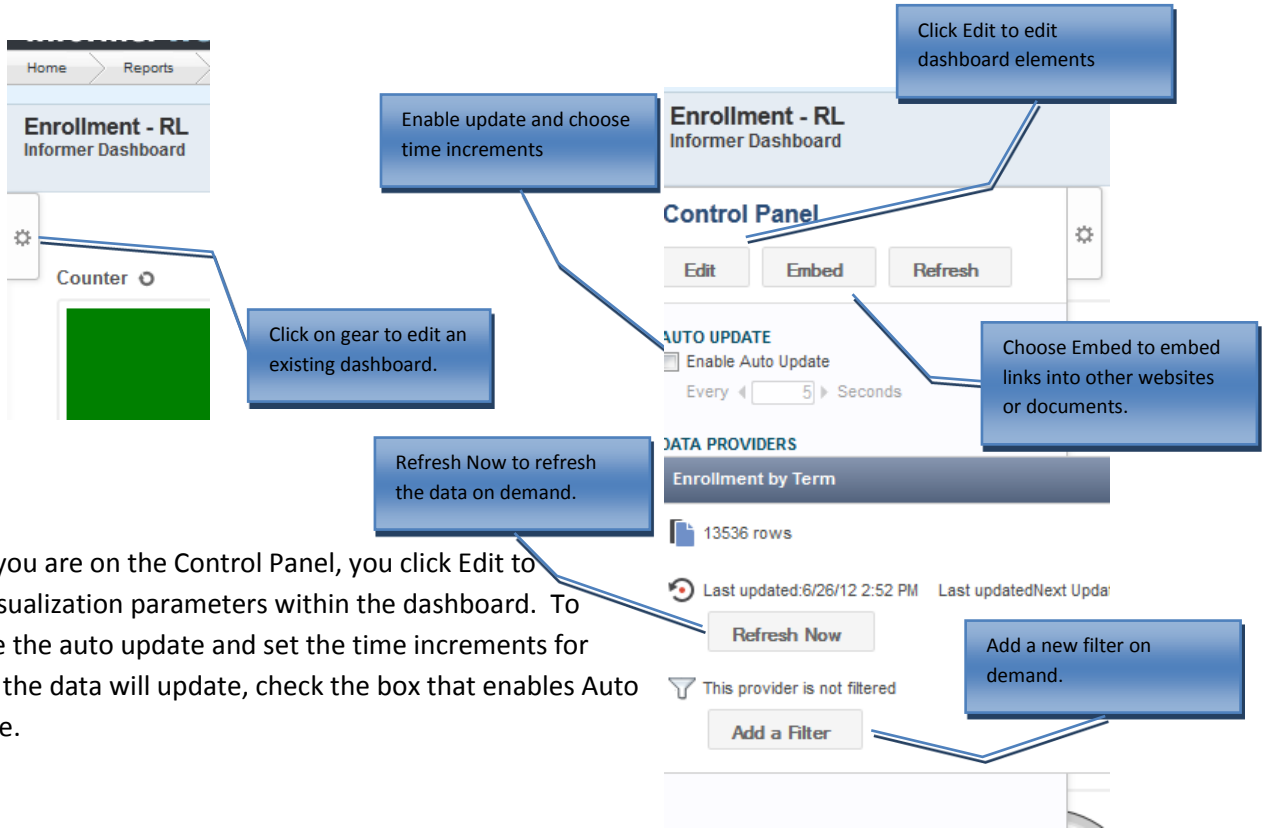






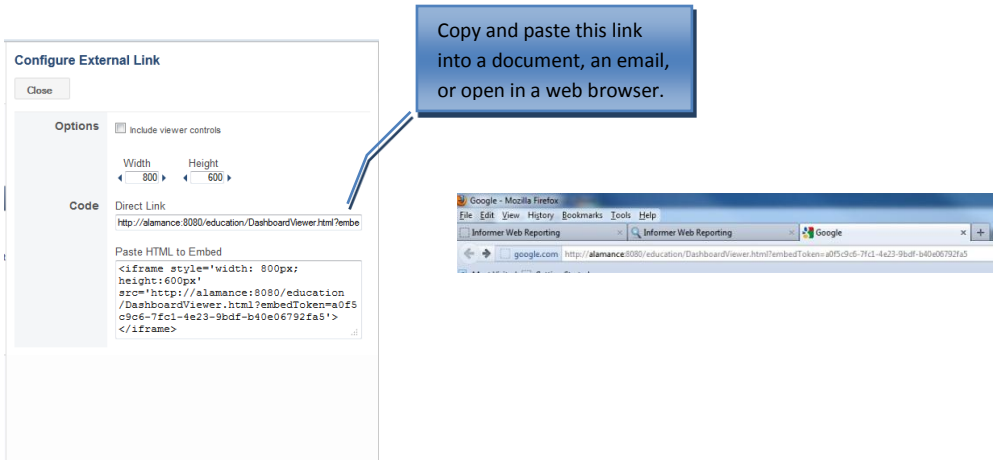
Editing an Existing Dashboard

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.



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.