



# **Dashboard Designer Introduction Guide**

**Basic step by step guide to creating a Dashboard**

**June 2012 – V1.2**

## **Table of Contents**

Introduction .....	3
webKPI BI Dashboards - Glossary.....	4
Install Dashboard Designer .....	5
Using Dashboard Designer .....	6
Saving and Publishing a Dashboard .....	8
Set Default Dashboard .....	8
Various Component Examples From webKPI.....	9
Dimensions component: .....	9
Dynamic table component:.....	9
Table component: .....	9
Chart created from Table component .....	10
Speedometer component: .....	10
Image components: .....	10
Text and cell components: .....	10
Map component:.....	11

## **Introduction**

Dashboard Designer is the tool used to create and publish dashboards to the webKPI platform. When it comes to building dashboards, think of it like designing a PowerPoint slide – you start with a blank screen, and then start adding data and elements to the slide. There are many, many options available in Designer to assist you in building your one-of-a-kind dashboard.

To get you started, this basic step-by-step guide has been created to assist you in creating your first dashboard.

(Tip: don't forget to save your dashboard often. To save, click the save icon .)

## **webKPI BI Dashboards - Glossary**

**Advisor** – alert and notification engine – can be used to schedule report delivery via email

**Alarm** – specific condition of an indicator. For example, you can set an alarm so that when revenue is above a certain threshold, the number will appear in green. When it's below a certain threshold, it will appear in red.

**Connector Manager** – application used to create new database connectors or modify existing connectors

**Dashboard** – graphical interface of data – contains charts, tables, graphs, etc. Sample dashboards include Top 15 Customers, Revenue trends, Cost Center Analysis, etc...

**Dashboard Designer** – tool used to create and publish new dashboards or modify existing dashboards

**Dimension** – data element that is used for grouping. Examples include: customer, product, product category, sales representative, cost center

**Dimension filter** – filter options available for dimensions

**Enterprise Analysis Server (EAS) / Decision Support System** – embedded tool in KPI Online, allows end users to build their own reports and save reports, dice / slice into data, schedule automatic delivery of reports, etc. (activated by left-clicking on any value or bar / line in charts and selecting a dimension)

**Indicator / Metric / KPI (Key Performance Indicator)** – data that can be measured. Examples include: revenue, cost of sales, units, gross profit, gross margin, accounts payable balance, etc.

**KPI Online** – brand name for the Bitam Business Intelligence application via software-as-a-service platform

**Model** – a KPI Online solution, such as Revenue model, Inventory model, Accounts Payable model

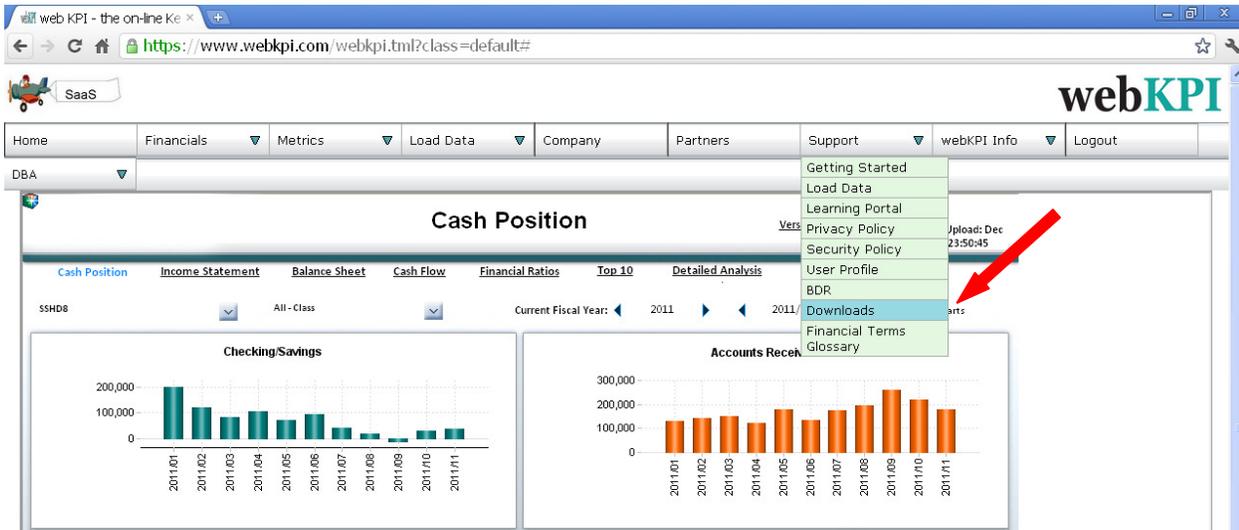
**Model Manager** – tool used to build new models or modify existing models, set user security levels, create alarms

**SaaS ETL Engine / Database connector** – tool used to schedule data upload jobs

# Install Dashboard Designer

Install the webKPI development tool kit and Dashboard Designer:

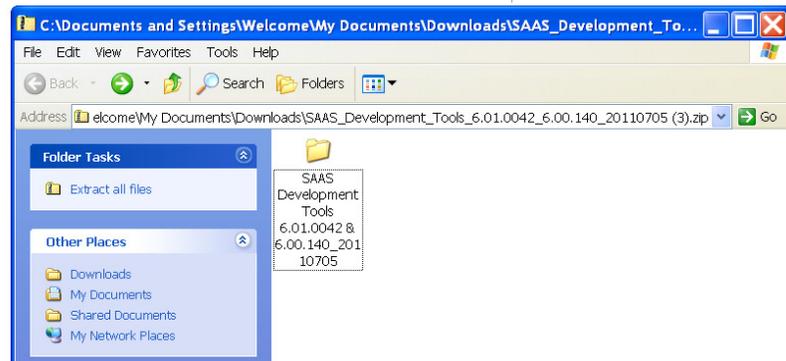
- Log into your webKPI account.
- Click the Support tab and then click Downloads



- Double-click Dashboard Designer



- Unzip SaaS Development Tools and extract to c:\program files\
- If you get the message that you need to install the MySQL Driver, go to the webKPI Support tab and double-click MySQL ODBC Connector (4<sup>th</sup> down in list from the top). You'll need to reboot your computer to make this effective.

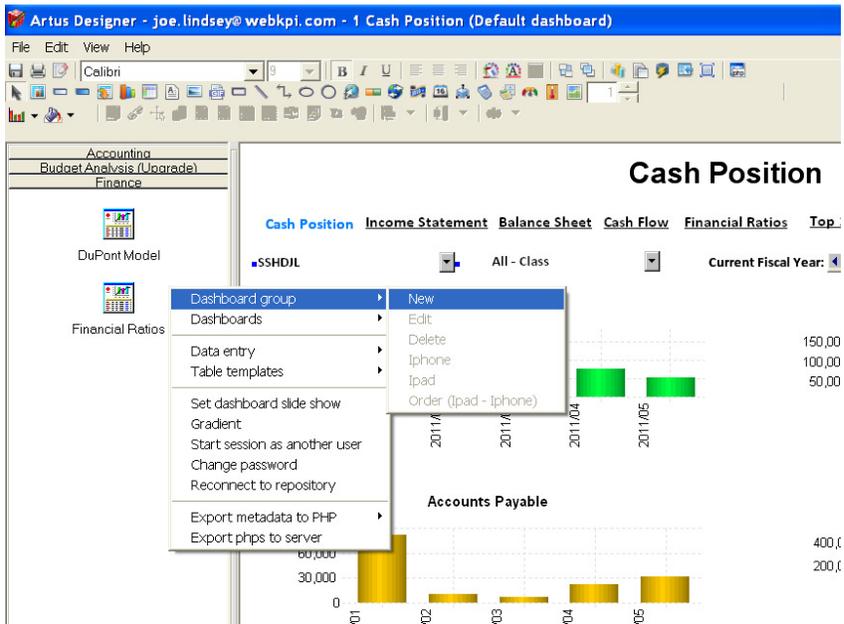


# Using Dashboard Designer

- After installation, launch the Dashboard Designer application by clicking the Windows Start button and going to All Programs, Bitam SaaS, Dashboard Designer. For step-by-step instructions on starting webKPI Dashboard Designer, see this video: <http://www.screencast.com/t/0ADEVXa7M>

- The Designer login window will appear. Login to the Designer using your webKPI id and password.

- After logging in, you will be viewing the default dashboards we have built for your use. On the left hand side, you will find a variety of dashboard groups, such as Accounting, Finance, etc. Click on one of the dashboard groups to open that group and see the dashboards related to the dashboards in the group.



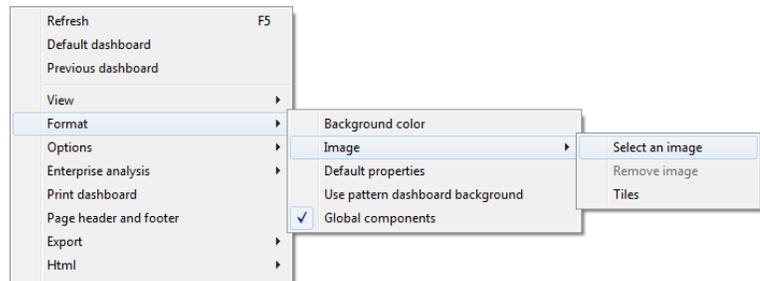
- To create a new dashboard group, right click in the empty white area under one of the dashboard groups and select Dashboard Group, New.

- Enter the new dashboard group name and click OK.

- To create a new dashboard, click the appropriate dashboard group. Right click in the white area and select Dashboard → New.

- Enter the name of the new dashboard and click OK.

- Once you have created a new dashboard, you will have a blank screen to the far right. This is your new dashboard.



To begin creating your dashboard, you should first add a background image. Right click in the new dashboard and go to Format, Image, Select an Image. Browse out to the location of your image.

- webKPI will be happy to provide you with our standard background images. Please ask your webKPI representative for these images, or you can create your own images. Background images must be saved in the C:\Bitam\ Folder.

- Once you have placed a background image, you are now ready to start adding components to your new dashboard. Components can be added by clicking the appropriate component icon on the icon bar near the top of the screen.



 - Table component

 - Cell component

 - Plus cell component

 - Pivot table component

 - Chart component

 - Dynamic table component

 - Text component

 - Image component

 - Gif component

 - Rectangle component

 - Line component

 - Multi-line component

 - Ellipse component

 - Circle component

 - Linker component

 - Progress bar component

 - Internet URL Address component

 - Banner component

 - Periods component

 - Dimension component

 - Operand component

 - Divisor operand component

 - Speedometer component

 - Thermometer component

 - Map component

- After selecting the appropriate component, draw the component on the dashboard. Based on the type of component selected, you will need to either identify the data elements for the component, enter text, etc. Examples below:
  1. To use the text component – click the text icon and draw the text box on your dashboard. Enter the text in the text dialog box and click OK.
  2. To use the cell component – click the cell or plus cell icon and draw the cell on your dashboard. Open the metadata tab and drag the metric and a time period into the cell.
  3. To use the dynamic table component – click the dynamic table icon and draw the table on your dashboard. Open the metadata tab and drag the appropriate dimension under the appropriate metric and a time period into the table. (You will need to expand the metric list in order to see the dimensions – with the dynamic table you must use a dimension and time period.)
  4. To use the table component – click the table icon and draw the table on your dashboard. Open the metadata tab and drag the appropriate metric and time period(s) into the table.
  5. To create a chart easily – build the table first and right click on the table, select draw chart. Chart will appear. Click the chart properties icon to change the properties of the chart.
  6. To add a time period filter on the dashboard – select the Periods icon and draw the time filter box on the dashboard. Right click on the time filter box and select period to choose the time period format. Synchronize the time filter option by right clicking on the time filter box and

selecting synchronize – choose the components that need to be synchronized to the time period.

7. To add a dimension filter on the dashboard – select the Dimensions icon and draw the dimension filter box on the dashboard. Click the metadata option and drag the correct dimension into the filter box. Synchronize the dimension filter option by right clicking on the dimension filter box and selecting synchronize – choose the components that need to be synchronized to the dimension period.
- Components can be easily moved on the dashboard by clicking in the component until blue lines around the component flash. Once the lines flash, simply drag the component to the desired area.

## **Saving and Publishing a Dashboard**

- After creating or modifying a dashboard, you are ready to publish the dashboard.
  1. First, save the dashboard by clicking on the . It's a good idea to click on the disk symbol from time to time as you are working on your dashboard design.
  2. When you're ready to publish your dashboard, go to File → Dashboards → Publish – select User Group, select Client Dashboards in the drop-down list, click Apply and click OK.
- This section prepares the code to transmit to the server.
  3. click the PHP icon  on the tool bar. Drag the new or updated dashboards from the left pane to the right pane. Select "All" for users, select "All Cubes: select "Replace Images" and click OK. The dashboards will then be exported to a PHP format.
  4. After the PHP format export is complete, click File on the top menu bar, select Export Metadata to php and click All Users. This will start the dashboard upload process to your account. When the upload process completes, click OK
  5. Click File on the top menu bar, select Export phps to server and, if using Backgrounds, click to put check in box for Replace Image, click OK, and when Export is complete, click OK.
- Once the dashboards have been uploaded to webKPI, you can now view them by logging into webKPI and going to the Dashboard Explorer. (To access Dashboard Explorer, click the colored block icon in the upper left hand corner and go to Dashboard Explorer.
- If when you log into webKPI and either default to a particular Company, or select View for a particular Company and then you are unable to access dashboards – you'll see a funny icon – then the Admin will need to log into the Dataspace as the Dataspace owner, open the Dashboard Library, open the Tools folder, Click on KPI Model Manager, click Users which will display the users for this dataspace. Check to see if each user has a Default Dashboard defined by clicking on the users Long Name. If their Default Dashboard is set to none, you'll need to click on the pencil icon, select a Default Dashboard from the drop down and click Save.

## **Set Default Dashboard**

- When the webKPI users accesses a webKPI Company, either by the Company automatically appearing in the opening dashboard (user only has access to one webKPI dataspace), or user has access to multiple Companies and clicks View in the Company Detail, the opening dashboard is the default dashboard for that webKPI user in that dataspace. While in Dashboard Designer, to set a

dashboard as the default, click the name of the Dashboard and press the F6 key or right-click on the Dashboard.

- When you press the F6 key, Dashboard Designer will request a confirmation to set the dashboard as the default for the dataspace.

## Various Component Examples From webKPI

To assist in selecting the appropriate component to add to your new dashboard, below you find examples from the standard webKPI dashboards, and the type of component that was used to create it.

### Text component

**AR Balance**

### Cell component

**6,248,264**

**Linker components:** Used to link to dashboards or call a command, such as print.

[Home](#)

[Revenue](#)

[Inventory](#)

[Expenses](#)

[Accounts Receivable](#)

[Accounts Payable](#)

**Periods component:** Used to change the time period on a dashboard



**Dimensions component:** Used to add a dimension filter to a dashboard



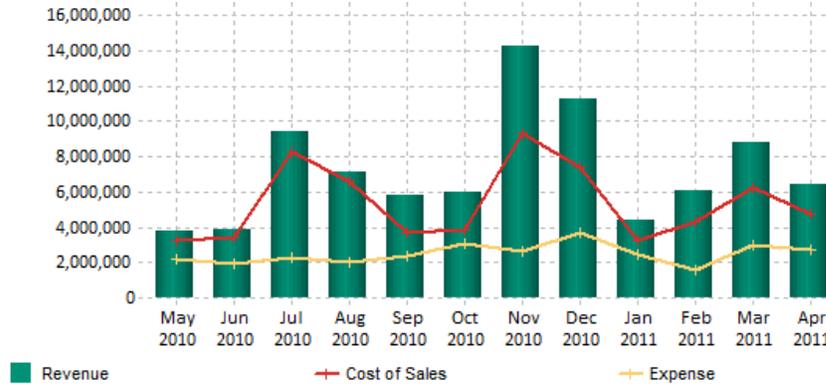
**Dynamic table component:** Used to create table with various metrics based on a dimension(s)

Customer	Revenue	Revenue (%)	Growth Previous Period	Growth Previous Year	Cost of Sales	Gross Profit	Gross Margin	Avg Price
1 SP RICHARDS COMPANY	551,122	8.53 %			268,197	282,925	51 %	41,283
2 ABBOOD/HOLLORAN ASSOCIATES, INC.	476,452	7.38 %			394,564	81,888	17 %	16,741
3 ACTIVE CONTROL EXPERTS, INC.	371,242	5.75 %			231,287	139,955	38 %	35,526
4 DONNEGAN SYSTEMS	319,779	4.95 %			216,709	103,070	32 %	2,589
5 AEA TECHNOLOGY PLC@	313,253	4.85 %			309,936	3,317	1 %	31,388
6 ITOYA	275,364	4.26 %			199,775	75,589	27 %	8,888
7 AIT ASSOCIATES, INC.	250,751	3.88 %			173,100	77,651	31 %	6,066
8 INDUSTRIAL COST ENGINEERING	235,740	3.65 %			130,096	105,644	45 %	11,279
9 INNOVATIVE SALES BROKERS, INC.	174,842	2.71 %			122,249	52,593	30 %	4,195
10 JENST CO.	172,368	2.67 %			157,670	14,698	9 %	7,319

**Table component:** Displays indicators based on various time periods (this table is not displayed on the webKPI dashboard, it was used to develop the chart below)

Key performance indicator	May 2010	Jun 2010	Jul 2010	Aug 2010	Sep 2010	Oct 2010	Nov 2010	Dec 2010	Jan 2011	Feb 2011	Mar 2011	Apr 2011
Revenue	3,764,174	3,837,966	9,433,978	7,173,209	5,787,585	6,031,113	14,228,557	11,232,382	4,394,401	6,035,688	8,823,259	6,457,532
Cost of Sales	3,257,689	3,397,848	8,297,309	6,617,468	3,716,298	3,833,250	9,324,624	7,360,504	3,284,269	4,284,266	6,217,979	4,752,166
Expense	2,245,692	1,980,431	2,288,206	2,038,251	2,388,869	3,079,147	2,605,412	3,735,305	2,501,611	1,586,475	3,017,850	2,760,361

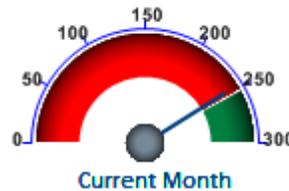
## Chart created from Table component



## Create the Series

For the chart above, the Series (the display of the items included on the chart as icons (Revenue, Cost of Sales & Expense as shown above) is created by clicking the Show Series Icon - the 8<sup>th</sup> icon from the left on the lower icon bar.

## Speedometer component:



**Image components:** with links to call out commands / functions



**Text and cell components:** 13 text components, 40 cell components

	Apr 2011	Var PP	Var PY	YTD	Var
Revenue	6,457,532	-27 %	8 %	25,710,881	8 %
Cost of sale	4,752,166	-24 %	9 %	18,538,680	9 %
Gross Profit	1,705,365	-35 %	7 %	7,172,200	4 %
Expense	2,760,361	-9 %	23 %	9,866,298	-100 %
Profit	-1,054,996	156 %	64 %	-2,694,098	-139 %
Gross Margin	26 %	-11 %	-1 %	28 %	0 %
Net Margin	-16 %	249 %	52 %	-10 %	-136 %
Avg Price	2,312	-19 %	0 %	2,191	0 %

**Map component:**

