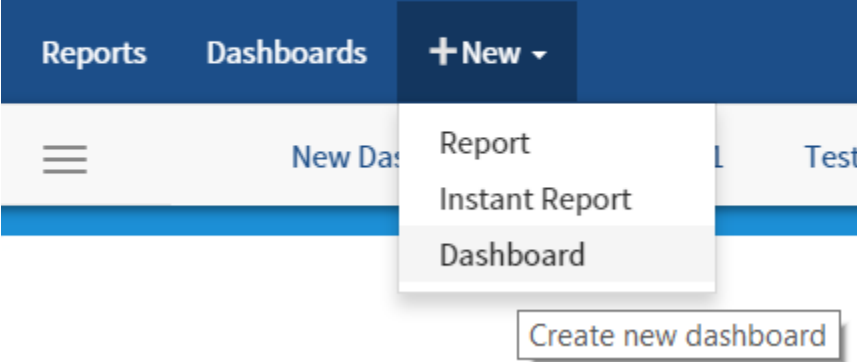


Business Intelligence User Guide

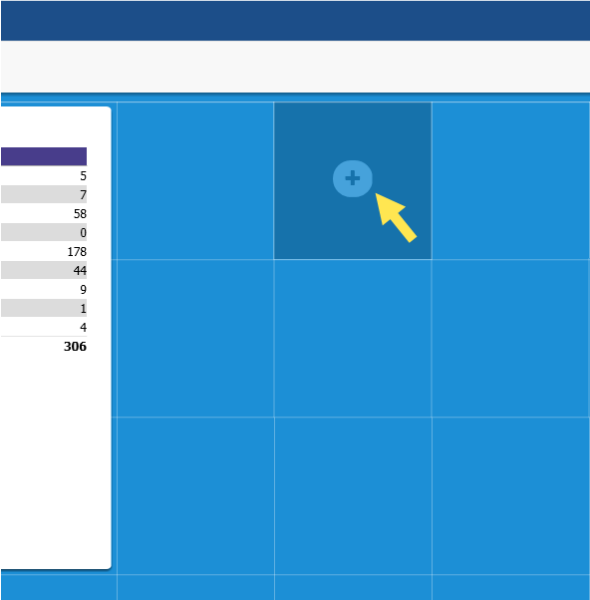
Creating a New Dashboard

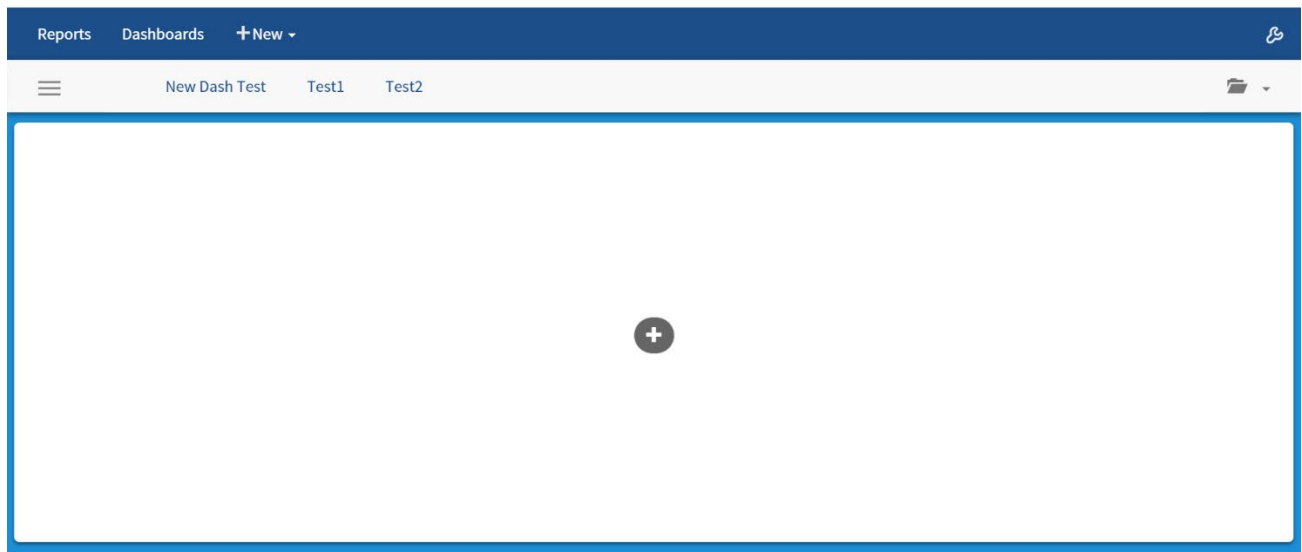
1. Click on the arrow to expose the menu under New.
2. Select Dashboard from the Menu drop down. A New Blank Dashboard will be exposed with a blank tile.



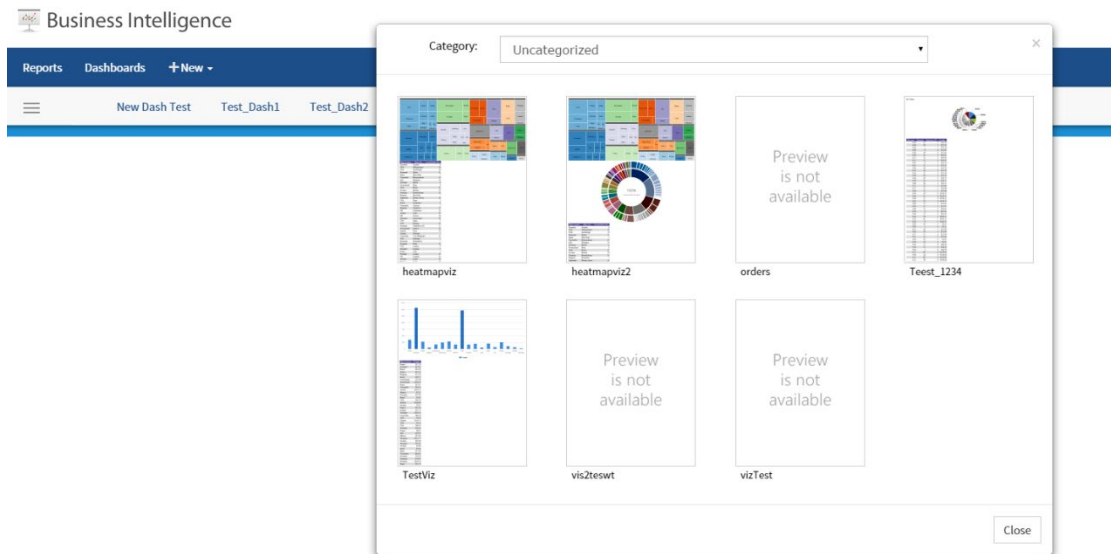
Adding Report Parts to the Dashboard Tile

3. Click on the + sign to add a Report Part to the new Dashboard



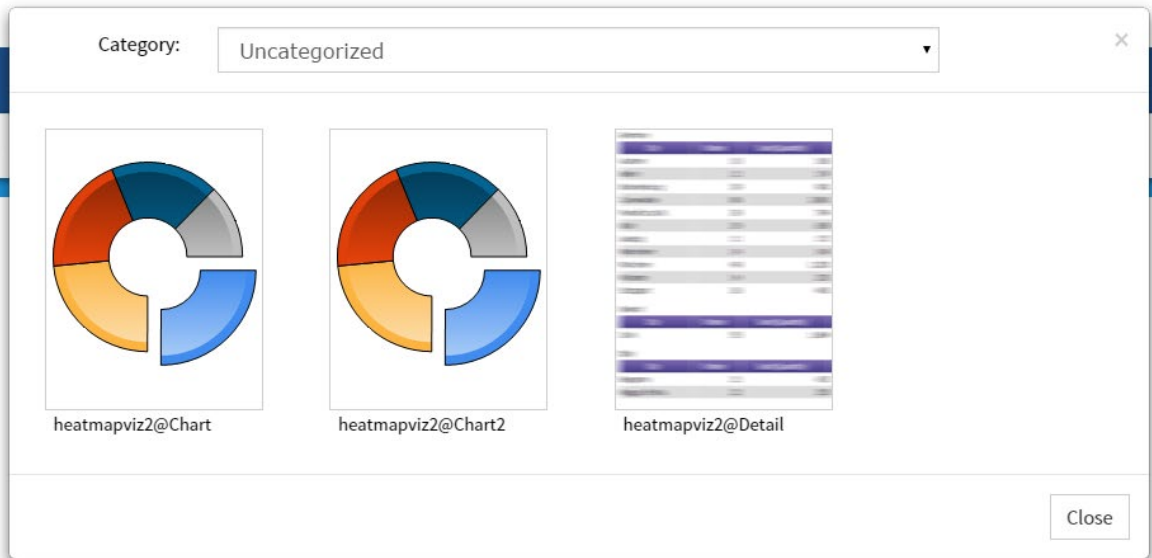


4. The user can now select a report to use in the dashboard.

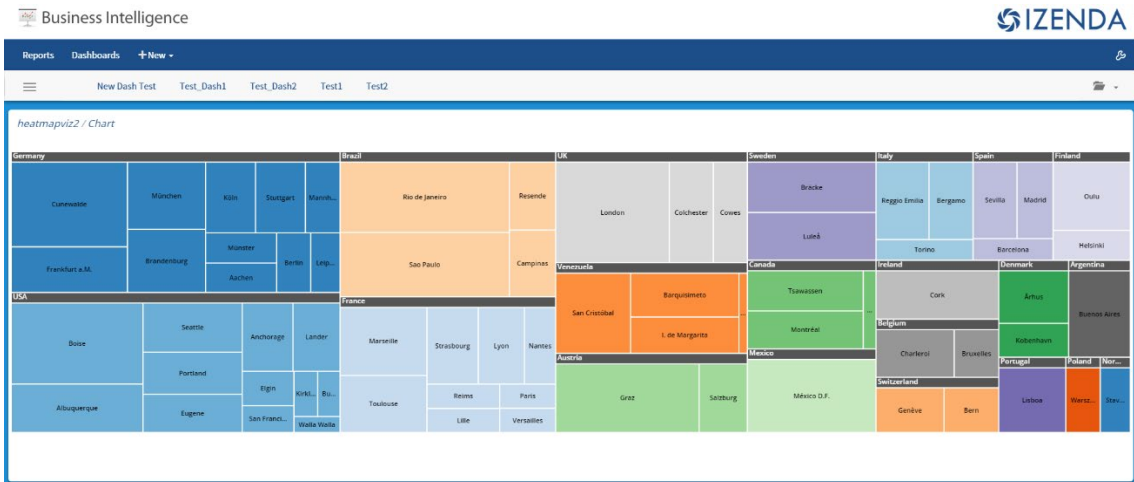


5. When a report is selected, the user is presented with a window displaying all of the report parts as options to add to the new dashboard. These can include charts, maps, gauges, summaries, or report details.

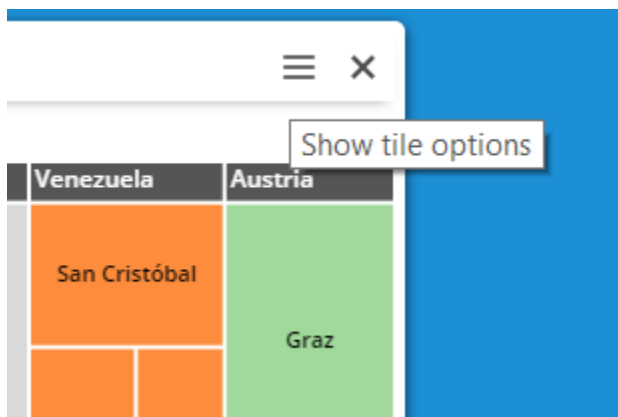
Test_Dash2



6. The report part selected will then be displayed to the user.



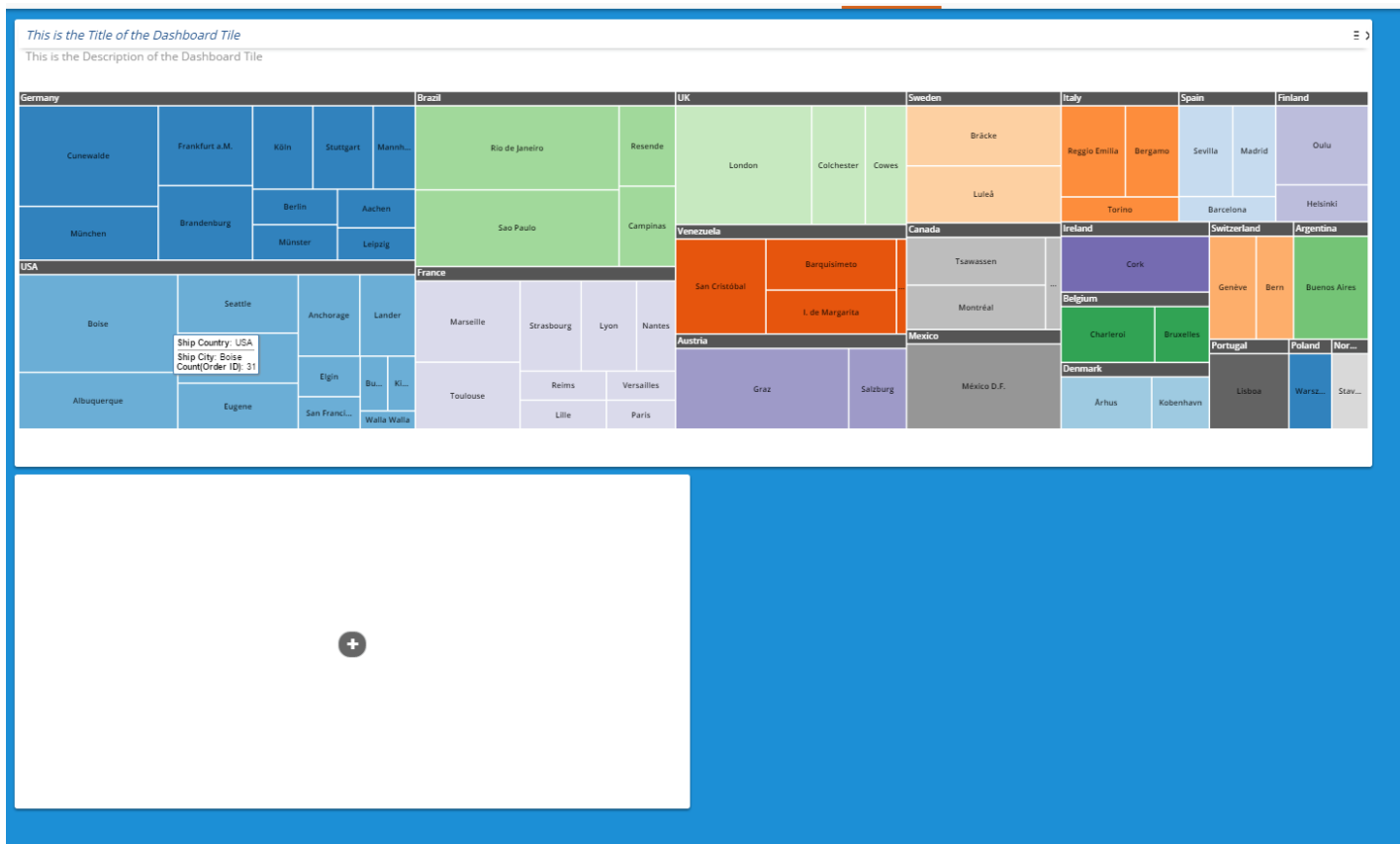
7. To remove a tile, simply click the "X" in the top right corner of the tile.



- To add additional tiles to the dashboard, the user can click on a blank area of the dashboard background.



A new blank tile will then be displayed.

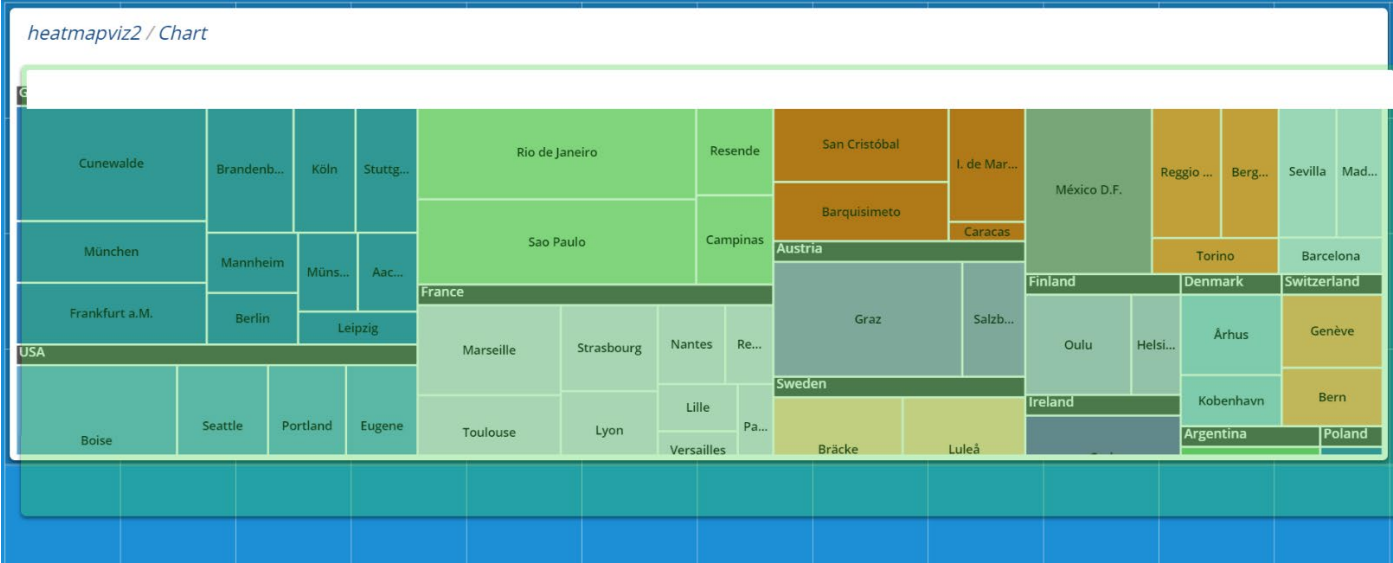


The user can repeat the process to add additional tiles.

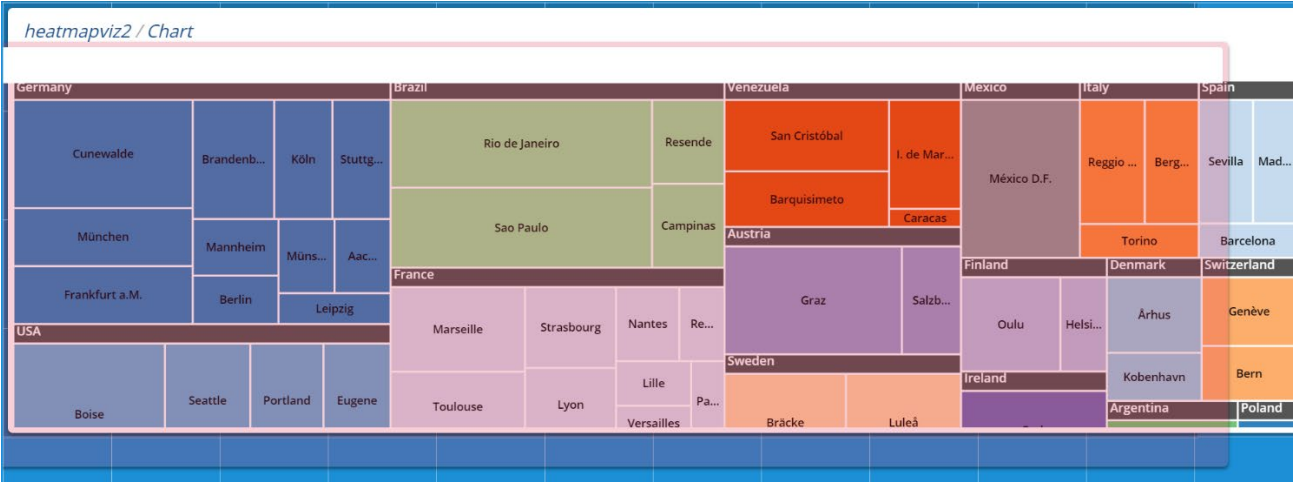
Moving & Resizing Dashboard Tiles

The tiles can be resized by dragging the corners to the desired length or width. Tiles can also be moved around the Dashboard. When the tile shows a green hue, it is positioned correctly and can be placed on the grid. If the tile shows a red hue, it is not positioned on the grid properly and cannot be moved.

Properly Positioned Tile for move (green hue).

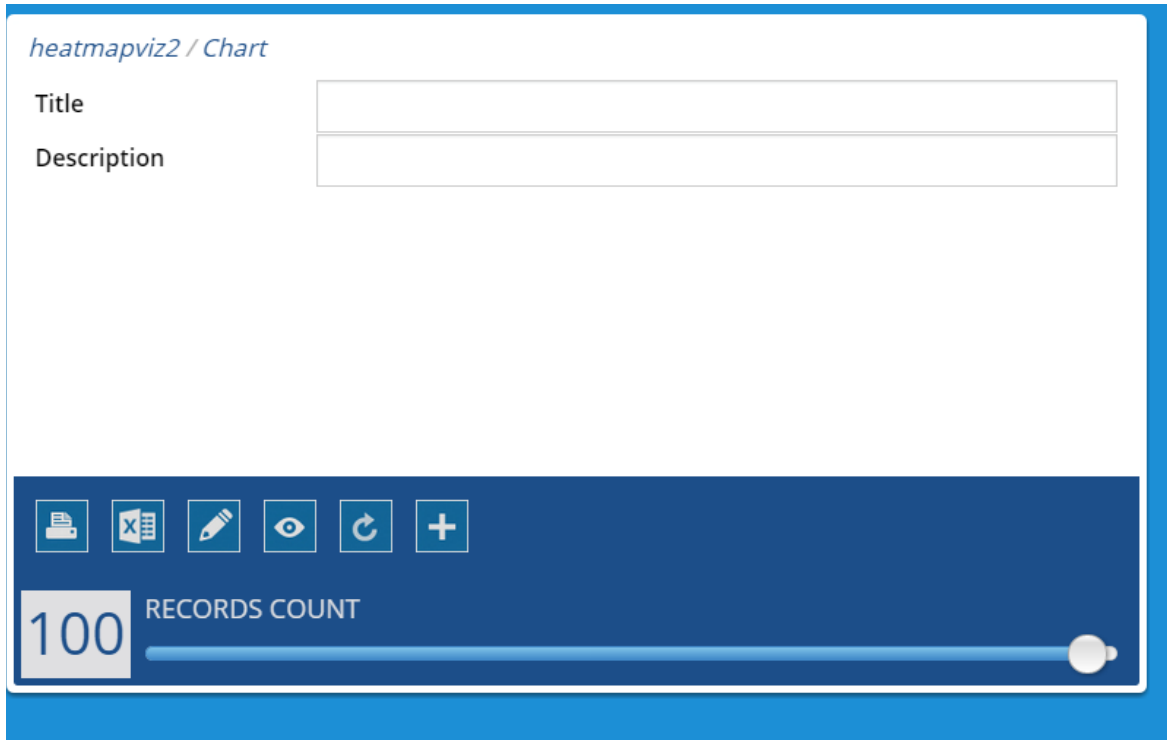


Improperly Placed Tile for move (red hue).

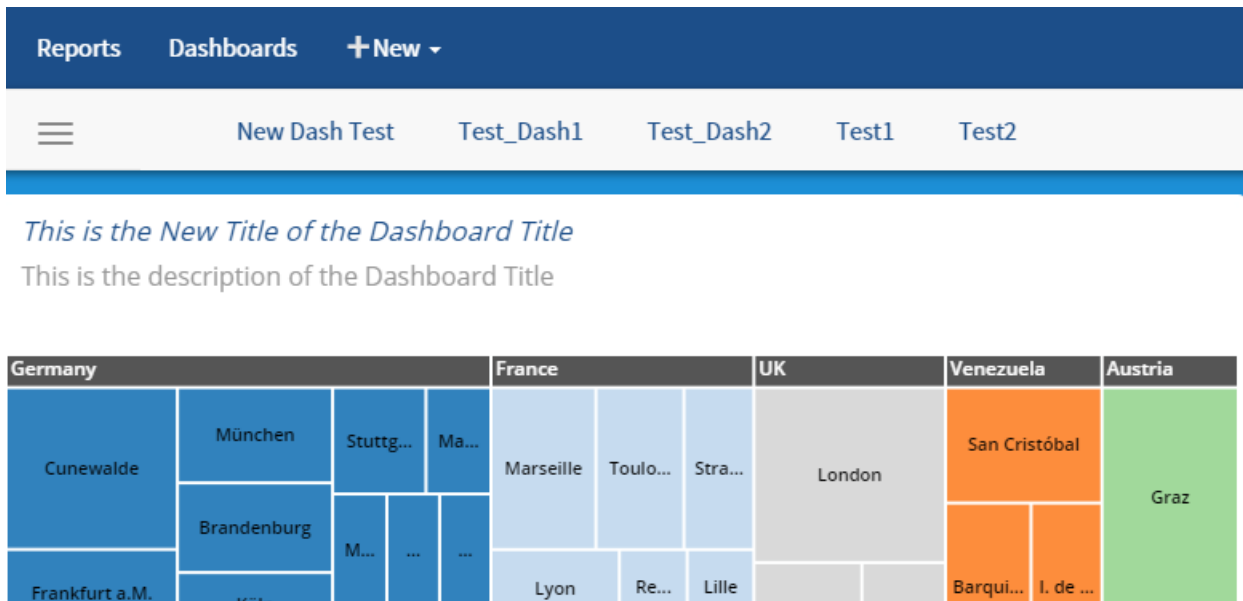


Tile Customizations


There are several options available for customizing a tile. These options can be found by clicking on the menu button in the top right corner of the specific tile. The tile will then spin to the reverse side, revealing the additional options.




The user can now choose to add a Tile that is displayed on the front of the tile along with a Description that is also displayed on the tile.










The additional following menu items are available for use on the back of each dashboard tile.



100 RECORDS COUNT



Appearance	Description
	Print tile report – prints the tile from dashboard
	Export tile report to Excel
	Opens the Report the tile is created from in report editor
	Opens the Report the tile is created from in the report viewer
	Reloads the tile from report
	Add a new report part to tile (change report part selected from original report)
	Change the Number of Records to be displayed in the tile

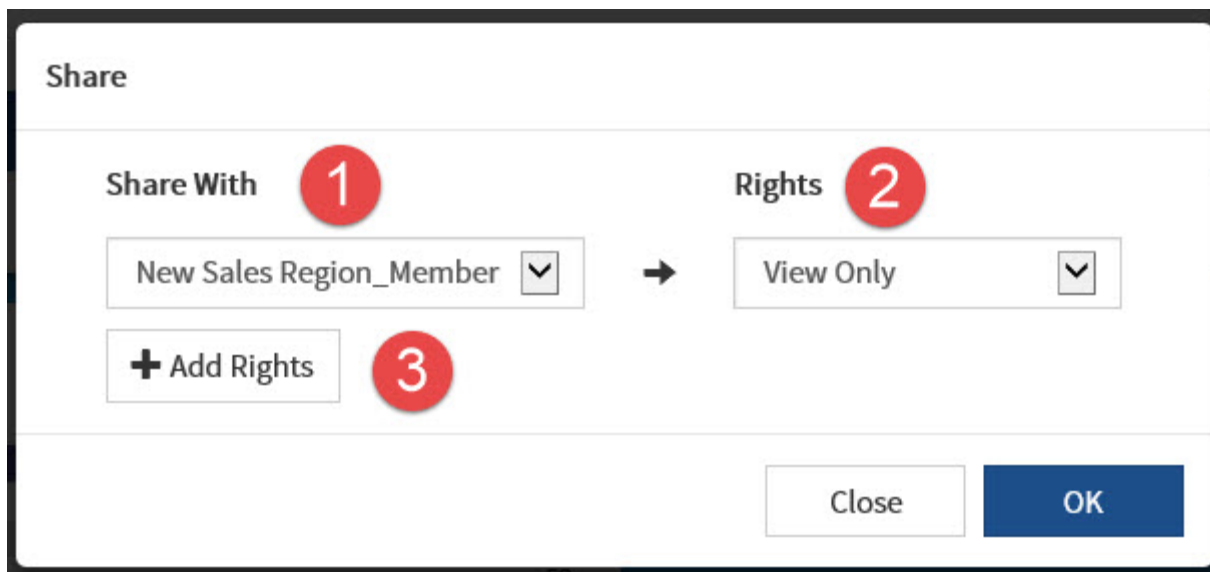
Securing the Dashboard

Now that you have created your dashboard you will want to secure it to insure that it is available to the appropriate audience with the appropriate rights. To secure the dashboard click the **Main menu** icon and select the **Share** icon.



You will be presented with a dialog window allowing you to set the following:

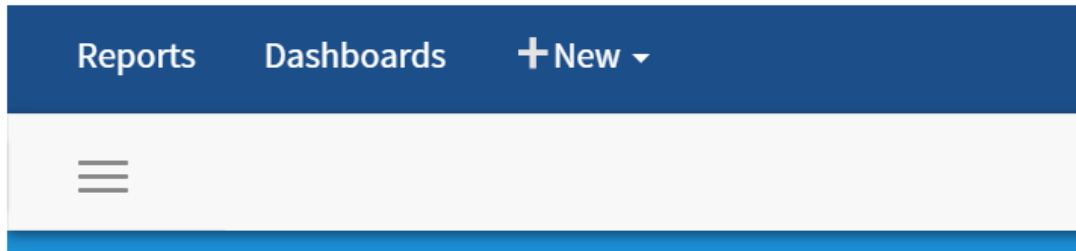
1. Group with which to share the dashboard.
2. Rights for that group.
3. Add additional groups and rights.

A dialog window titled "Share". It contains two main sections: "Share With" and "Rights".
- "Share With" (1) is a dropdown menu currently showing "New Sales Region_Member".
- "Rights" (2) is a dropdown menu currently showing "View Only".
- Below "Share With" is a button labeled "+ Add Rights" (3).
- At the bottom right are two buttons: "Close" and "OK".

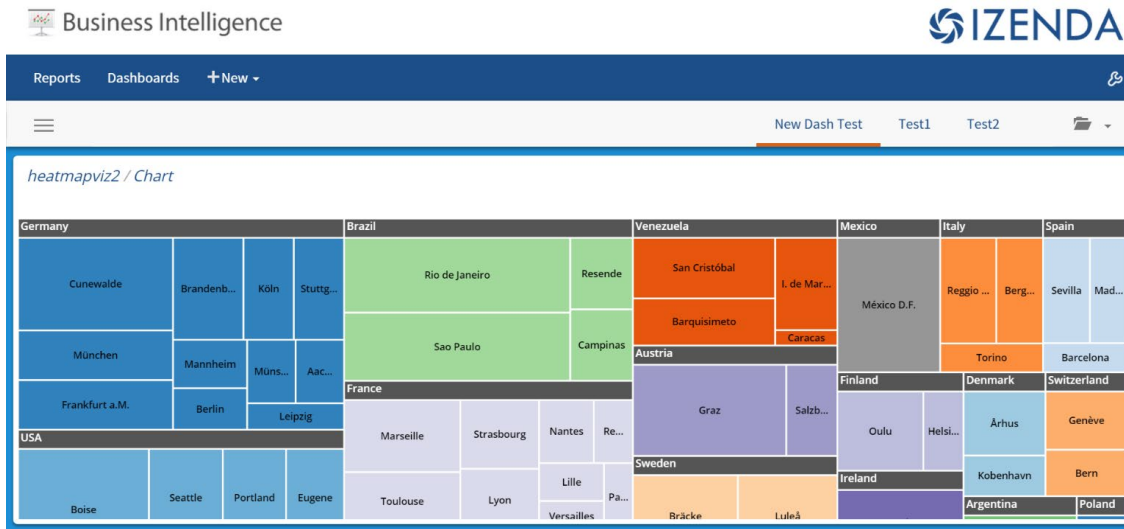
Make the appropriate security changes and then save the dashboard.

Viewing an Existing Dashboard

1. Click on Dashboard at the Top Navigation Bar














Dashboards will be displayed as tabs in the window with the active window highlighted from below:



Main Dashboard Menu

This menu offers the following menu options are available from the menu button in the top left navigation bar when expanded.



Appearance	Description
	Collapse Menu
	Presentation Mode – Allows the user to scroll through the Dashboard tiles in a carousel
	Create a New Dashboard
	Refresh Dashboard
	View Filters – Each report in the dashboard must share the same filter to be displayed
	Share Dashboard with other users
	Schedule Dashboard - Sends dashboard via email at a scheduled time Requires you to save the schedule, then save the associated Dashboard
	Print Dashboard = Prints Dashboard HTML or Report PDF
	Save Dashboard - Saves dashboard as different name or pdf file
	Send via Email – Send dashboard as a link or embedded pdf document
	Change Dashboard - Changes background image