QUICK START GUIDE

Version 4.00

November, 2018

Summary

1 What is BXBdashboard

BXBdashboard is a Business Intelligence (BI) software that improves the visualization of an organization, department or project performance indicators.

Speedometers, thermometers and charts can show the business performance.

Figure 1 – Dashboard sample

2 Accessing the tool

The user must login informing his username and password, unless when BXBdashboard is called by some application with the login automatically passed as a parameter. If the database contains more than one company, the company code must also be informed.

After logging in, if you are positioned in another module, you must select BXBdashboard in the combo-box at the upper left corner of the screen.

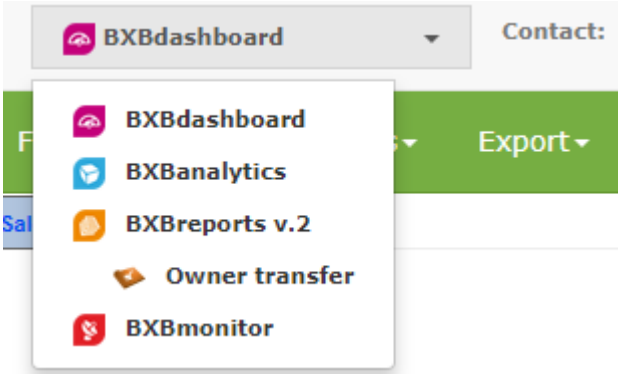

Figure 2 – Modules combo-box

3 BXBdashboard features

BXBdashboard allows to:

- Create new dashboards*
- Configure charts and gauges*
- Insert and remove charts and gauges from the dashboard*
- Apply filters (on gauges, charts or on all the dashboards)
- Drill down from charts and gauges
- Show and hide dashboards
- Manage the access permissions*
- Export dashboard to *.PDF* and *.PNG* image format.
- Send a dashboard image by e-mail

*These features are not available for *Viewer edition* users.

3.1 Adding/opening a dashboard

Click on the ***File*** > ***Open*** button.

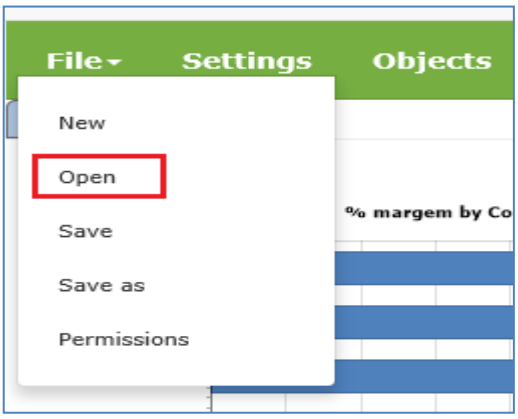

Figure 3 – Dashboards File menu

If there is some previously configured dashboard available, the list of existing (and not openend) dashboards will be displayed. Select a dashboard and then click on ***Open*** (Figure 4).

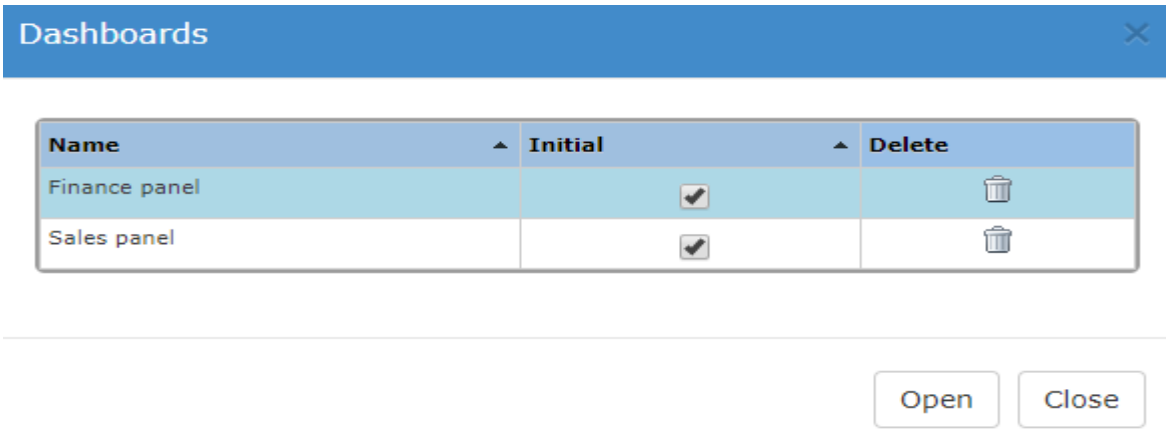

Figure 4 – Open dashboard

Note: Once you have selected the *check box* ***Initial***, the respective dashboard is automatically displayed every time the user enter BXBdashboard.

3.2 Creating a new dashboard

To create a new dashboard (without any related object), click on ***File*** > ***New***.

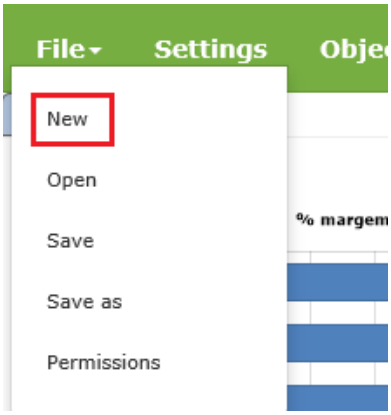

Figure 5 – Creating new Dashboard

Give the new dashboard a name. Then click on ***Save***.

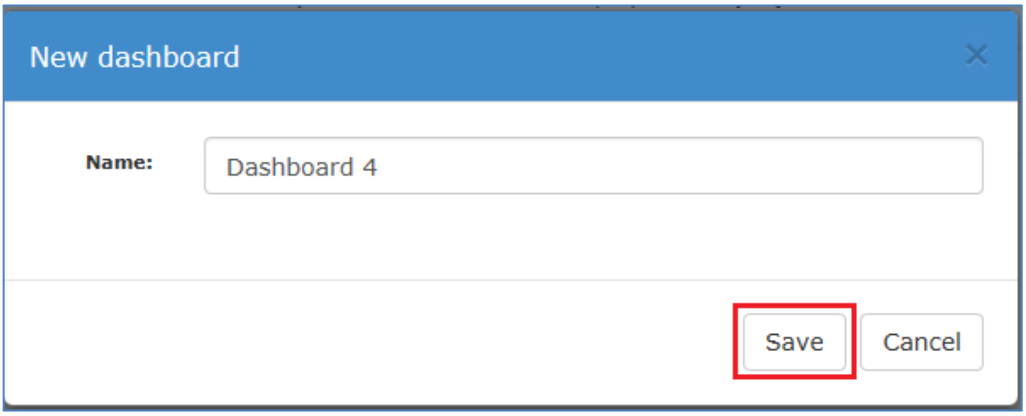

Figure 6 - New Dashboard

Once you set a name to the dashboard, the ***Objects*** screen will be displayed for you to insert previously configured objects (charts or gauges) on the dashboard or to create new ones. To insert objects in the dashboard, just check the desired ones at the column ***Insert in the dashboard*** and click ***OK***.

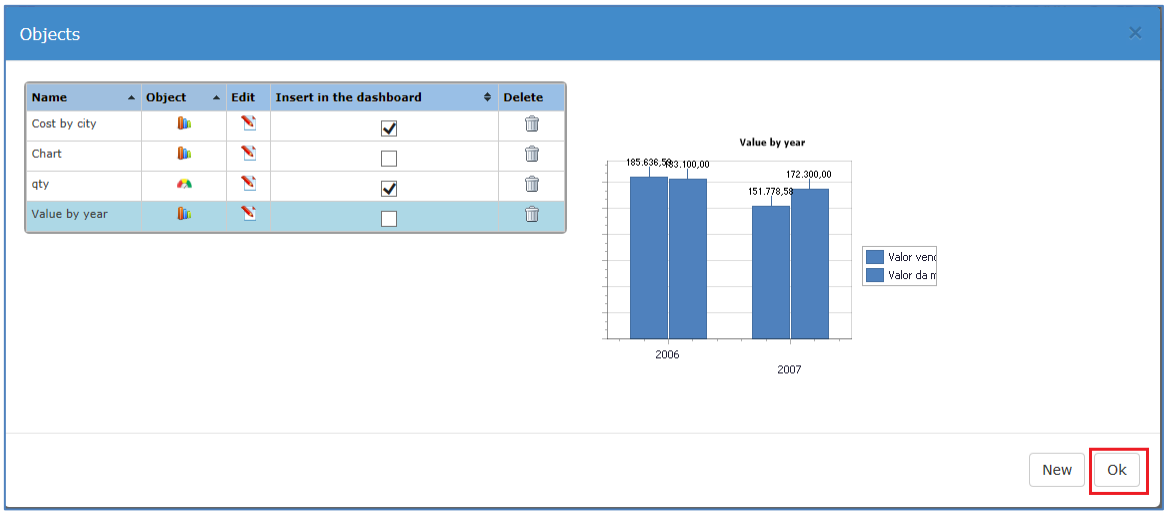

Figure 7 - List of objects

3.3 New gauges

To create a new gauge, click on the **"*Objects*"** button.

Figure 8 – Objects

For a new gauge, click on the button ***New***.

Figure 9 – New object

The ***Edit object*** screen will be displayed.

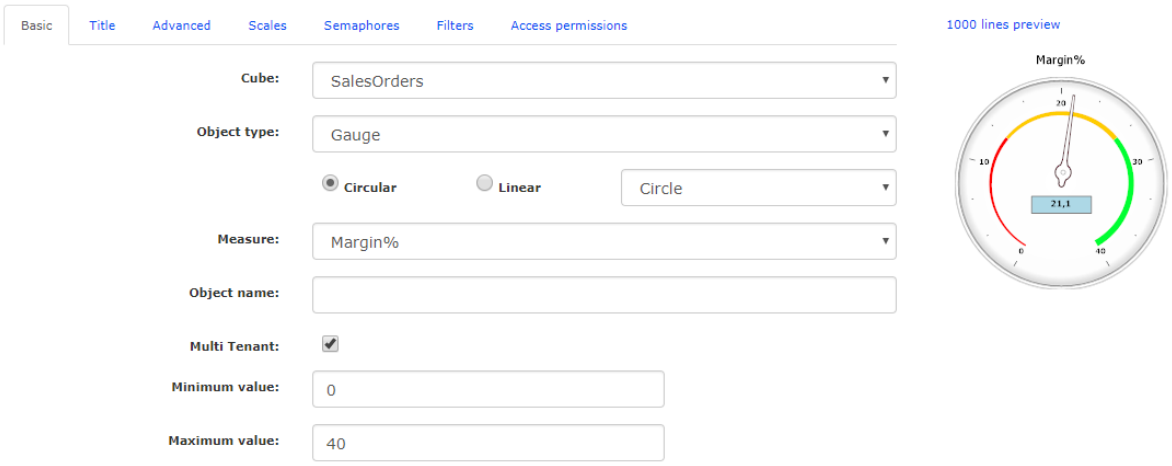

Figure 10 – Edit object: Gauge's basic tab

3.3.1 - Gauge's **Basic** tab:

- **Cube:** List of cubes that the logged in user have access permission.
- **Object type:** To choose, between gauge or chart.
- **Circular or Linear:** Gauge models to choose from.
- **Measure:** List with measures defined at the selected cube.
- **Object name**: Name of the object to be shown in the gauges list.
- **Multi tenant**: this check box is offered when the respective cube is multi tenant, and once the check box is checked, this gauge can be shared with all the provided companies of this environment.
- **Minimum value**: Value that determines the minimum scale of the gauge.
- **Maximum value**: Value that determines the maximum scale of the gauge.

3.3.2 - Gauge's **Title** (to be shown above the gauge) tab:

Title that will be displayed on the dashboard along with the gauge. It can be formed by up to 4 lines and the content of the first 3 lines is free for the user to define what he wants. The first line suggests the gauge's measure label (that the user can keep or change) and the 4th (last) row the user can choose to fill with the last cube's update date and time.

Figure 11 - Gauge's title set up form

3.3.3 - Gauge's **Advanced** tab:

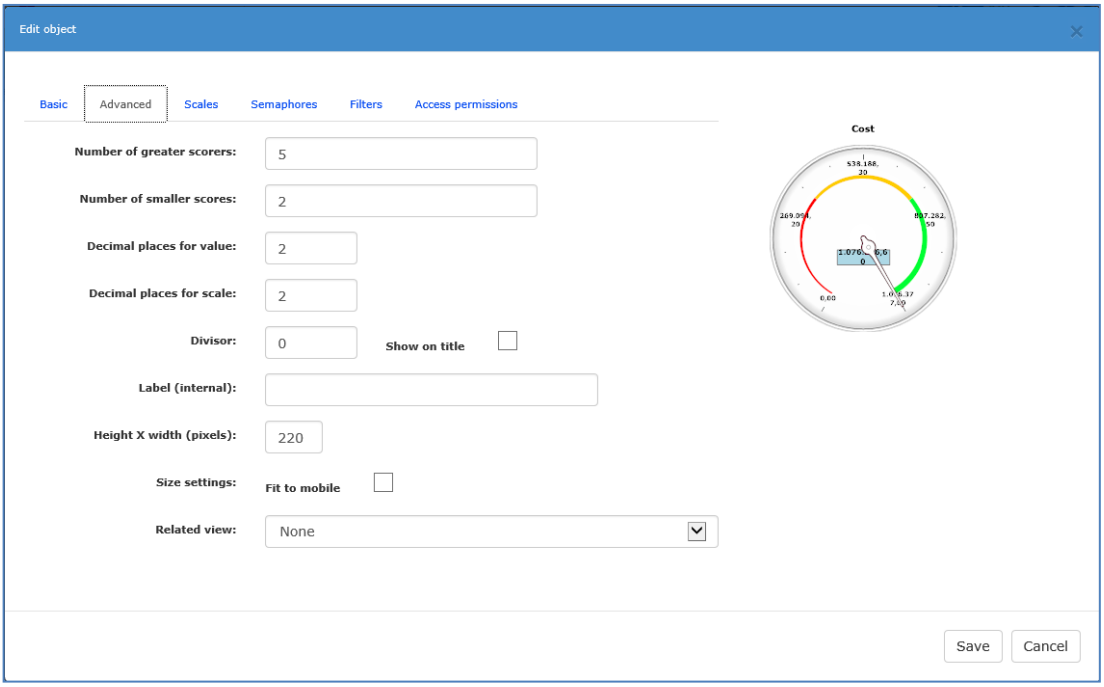

Figure 12 - Gauge's advanced tab

- **Number of greater scorers**: Quantity desired for greater markers to separate the scale values.
- **Number of smaller scorers**: Quantity desired for smaller markers to separate the scale values.
- **Decimal places (value)**: Sets the number of decimal places for the value of the gauge's selected metric.
- **Decimal places (scale)**: Sets the number of decimal places for the scale of the gauge's selected metric.
- **Divisor**: Allows dividing the total value of the measure.
- **Show in title**: Allows inserting the divisor automatically in the gauge's title.
- **Label (Internal):** Gauge's internal label, limited to 18 characters.
- **Height x Width (pixels):** Allows you to resize the gauge by changing the height and width in pixels.
- **Fit to mobile:** If activated and using a mobile device, the gauge will ignore it's size set by the user and will use the width from the mobile device as its own width.
- **Related view:** If the user has access permission to BXBanalytics, it will be possible to associate a view for the gauge in order to navigate between the gauge and the view from BXBanalytics.

3.3.4 - **Scales** tab: Options for customizing the gauge colors according to the range of values.

3.3.5 - **Semaphores** tab: Except for semi-circle gauge, allows enabling a semaphore that changes its colors according to the cursor position.

3.3.6 - **Filters** tab: Allows applying persistent filters to the cube's data, so that the gauge is displayed only with part of the cube's data.

3.3.7 - **Access permissions** tab**:**

To modify or delete: allows to define whether the deletion or modification is only allowed for who is creating the object or can be deleted or modified by any of the users marked in the "To view" check boxes.

To view: shows the list of users and the possibility of marking the respective check box for the user with the right to view this object.

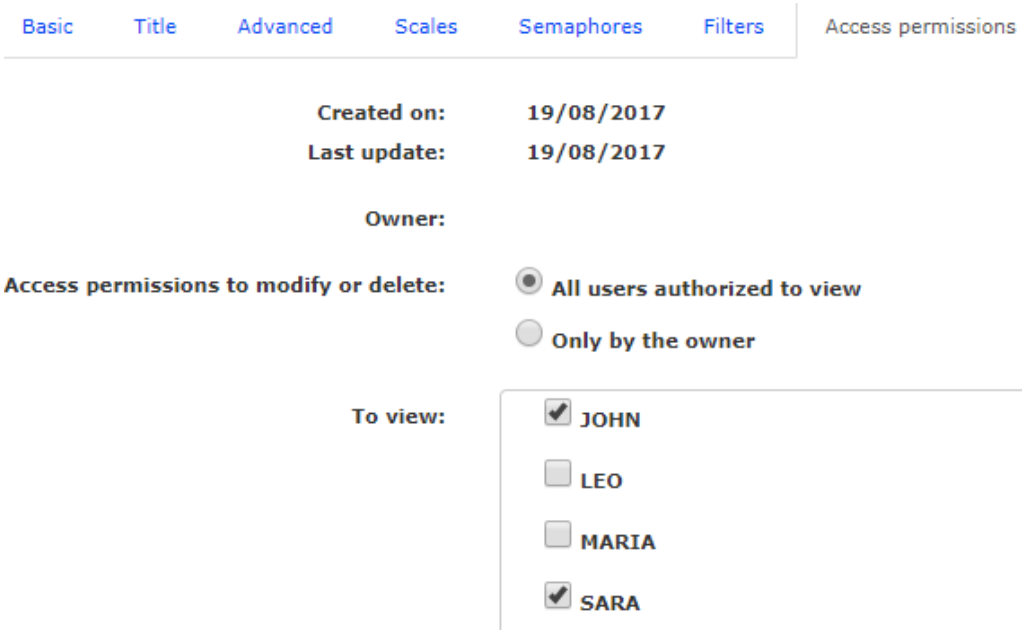

Figure 16 – Edit object: Access permissions

After configured and saved, the new gauge will be available at the list and already checked, to be inserted in the dashboard.

3.4 New charts

To create a new chart, click on the ***Objects*** menu button and, into the opened window, click on **New**. Then the screen ***Edit Objects*** will be displayed.

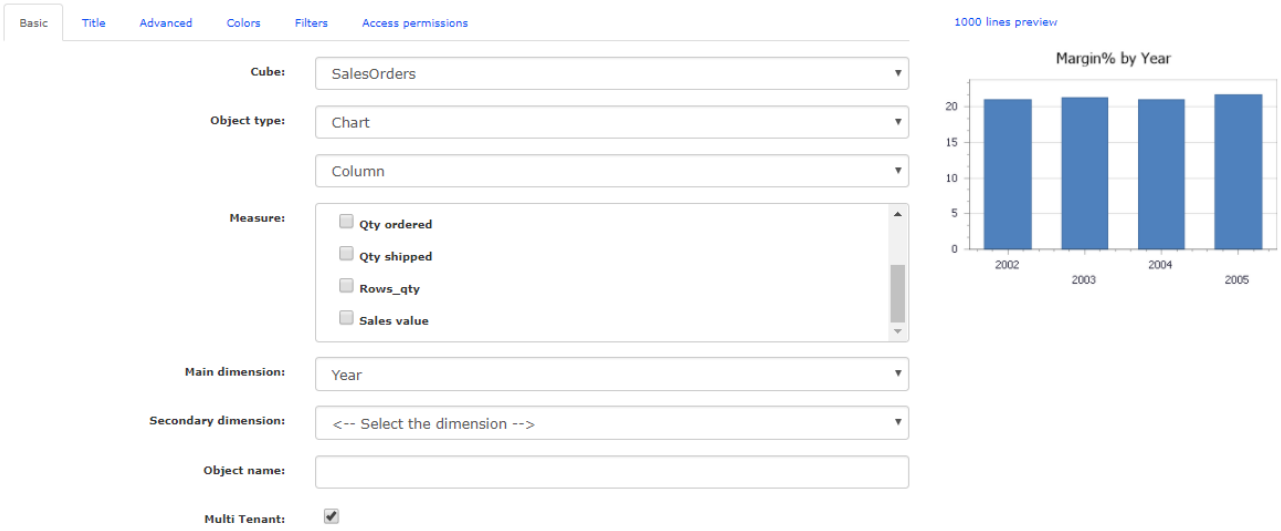

Figure 11 – Edit Object: Chart's "Basic" tab

3.4.1 - Chart's **Basic** tab:

- **Cube:** List of cubes that the logged in user have access permission.
- **Object type:** To choose between:
  . Chart: with the possibility to choose different formats of charts
  . Gauge: with 2 options: Circular or Linear
- **Measure:** List with the measures defined at the selected cube.
- **Main dimension:** The list with the dimensions defined at the selected cube will be displayed for the main dimension of the object. When selecting a date field with decomposed dates, a new list on the right will be displayed with their decomposed dates.
- **Secondary dimension:** The list with the dimensions defined at the selected cube will be displayed for the secondary dimension of the object. When selecting a date field with decomposed dates, a new list on the right will be displayed with their decomposed dates.
- **Object name**: To be displayed for selection in the charts list.
- **Multi tenant**: Check box offered when the cube is "multi tenant" and turns the gauge available to be shared with other companies in the environment.

3.4.2 - Chart's **Title** tab:

Title which will be displayed on the dashboard along with the chart. It can be formed by up to 4 lines and the content of the first 3 lines is free for the user to define what he wants. The first line suggests the chart's name (that the user can keep or change) and the 4th (last) row the user can choose to fill with the last cube's update date and time.

3.4.3 - Chart's **Advanced** tab:

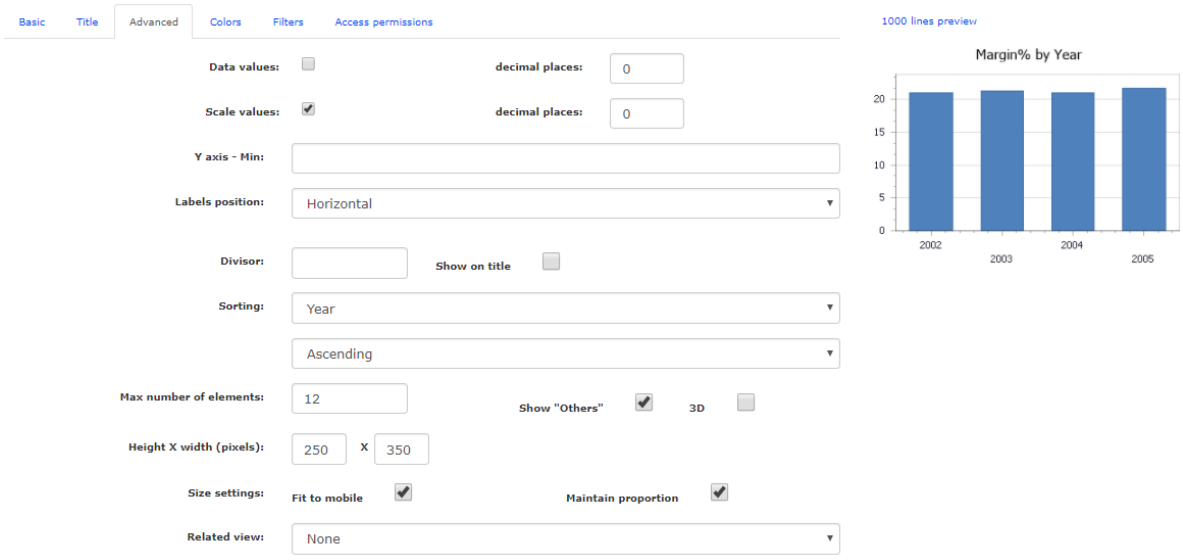

Figure 12 – Chart's advanced tab

- **Data values**: Allows hiding the data values at the chart. At the right, there is an option to set the number of decimal places (if not filled, the original definition of the cube will be considered).
- **Scale values**: Allows hiding the scale values at the chart. At the right, there is an option to set the number of decimal places (if not filled, the original definition of the cube will be considered).
- **Value as percent**: Displays the values converted into percentages. This option is available only for pie charts.
- **Y axis – Min:** Defines the minimum value to be displayed at the Y axis.
- **Labels position**: Allows choosing the position in which the legend has to be shown: "Right", "Left", "Top", "Bottom" or "Do not show". This property is shown only at Pie charts or charts using a secondary dimension.
- **Divisor**: Allows dividing the total value of the measure.
- **Sorting**: Options to sort, by measure or dimension, in ascending or descending order.
- **Max number of elements:** Allows limiting the number of elements that will be displayed at the chart.
- **Show "Others":** By checking this option, the chart will show as an additional element the sum of the rest of the elements.
- **3D:** By checking this option the chart will be transformed in a 3D model.
- **Height x Width (pixels):** Allows resizing the gauge by changing the height and width in pixels.
- **Maintain proportion:** If checked, when you change the width, the height is re-adjusted and vice versa.
- **Fit to mobile:** If activated and using a mobile device, the chart will ignore it's size set by the user and will use the width from the mobile device as its own width.
- **Related view:** If the user has access permission to BXBanalytics, it will be possible to associate a view for the gauge in order to navigate between the gauge and the view from BXBanalytics.

3.4.4 - **Colors** tab: Options for customizing the chart colors.

3.4.5 - **Filters** tab: Allows applying persistent filters to the cube's data, so that the chart is displayed only with part of the cube's data.

3.4.6 - **Permissions** Tab**:**

To modify or delete: allows to define whether the deletion or modification is only allowed for who is creating the object or can be deleted or modified by any of the users marked in the "To view" check boxes.

To view: shows the list of users and the possibility of marking the respective check box for the user with the right to view this object.

ATENTTION
Option ***"Value in percentage***" is exclusive to ***Pie*** type charts***.***
Option ***"Label position"*** is exclusive to ***Pie*** type charts or charts with more than two selected measures.

3.5 Drill down

You can drill down (detailing the information to the next level) both in gauges and charts.

Clicking on a chart or gauge, a temporary toolbar is displayed whith some icons: **Drill down**, **Navigation to BXBanalytics** **, **filter (funnel)**, **information about the chart/gauge, edit** * and **remove (X)** *. Another click on the chart or gauge hides the icons.

*These features are not available for *Viewer edition* users.

** Only if the user has permission for accessing views of the same cube and if allowed to use BXBanalytics

Figure 20 – Drill down Icon

The highlighted icon at the illustration above displays the Drill Down screen with ***Dimension***, ***chart type*** and ***sorting*** suggestion.

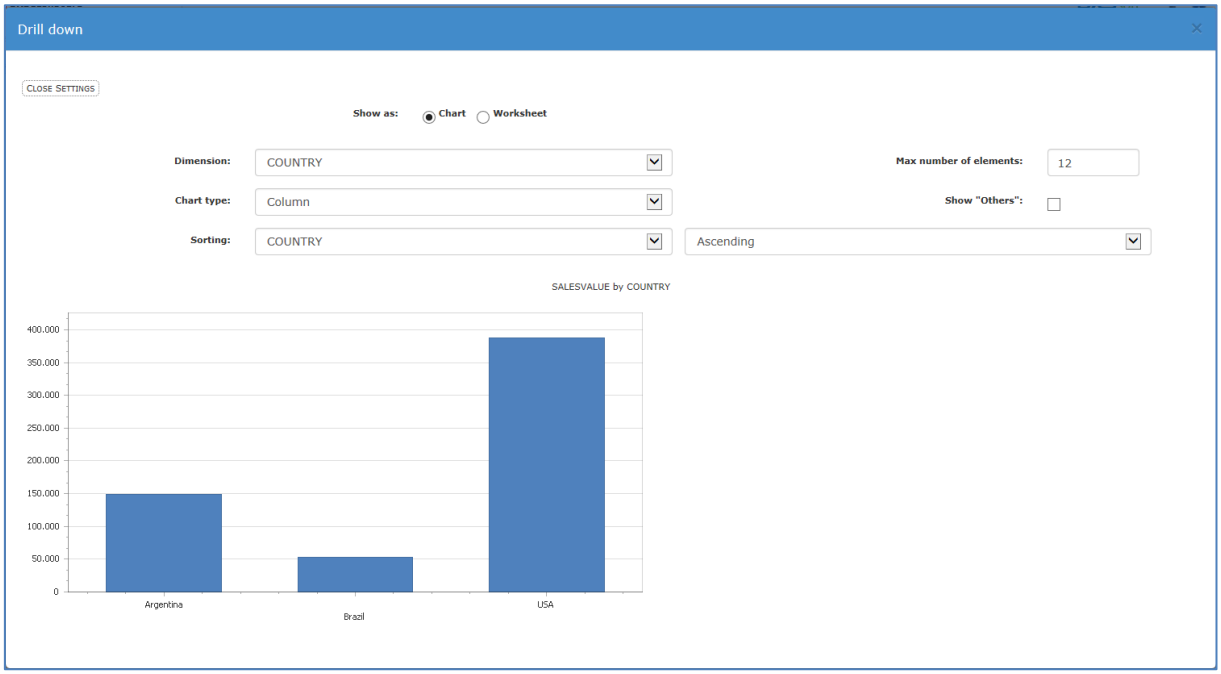

Figure 21 – Drill Down settings

Click on the specific area of the chart where you want to open details.

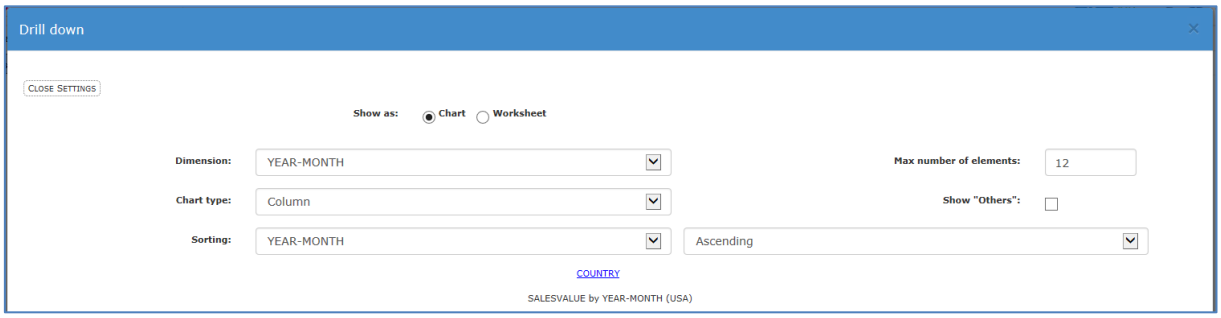

Figure 22 – Next Level on Drill Down

Change the chart type to *Column* and click ***Ok.*** The chart is shown at the same screen of *Drill Down*. When the number of elements is very large, the top 7 are displayed and the remaining ones are accumulated in the element ***Other***. The maximum number can be changed at the **Max number of elements** field.

By clicking on a column, there's a new *drill down*, allowing you to select the dimension and the **Chart Type**, which can be: ***column, pie, area, line*** or ***bar***.

Note: Once the user has chosen the sequence of dimensions, measures, sort orders and chart types at the drill down process, BXBdashboard will repeat this sequence for the next drill down.

3.6 Drill down as worksheet

Another way to drill down the data is through a worksheet, which will be obtained by:

a) A drill down from the dashboard when the drill comes from a chart with two dimensions (if the chart in the dashboard has only one dimension, the default drill mode is through a chart);

b) Selecting the "Worksheet" option at the "Show as" radio button in the Drill down Settings panel.

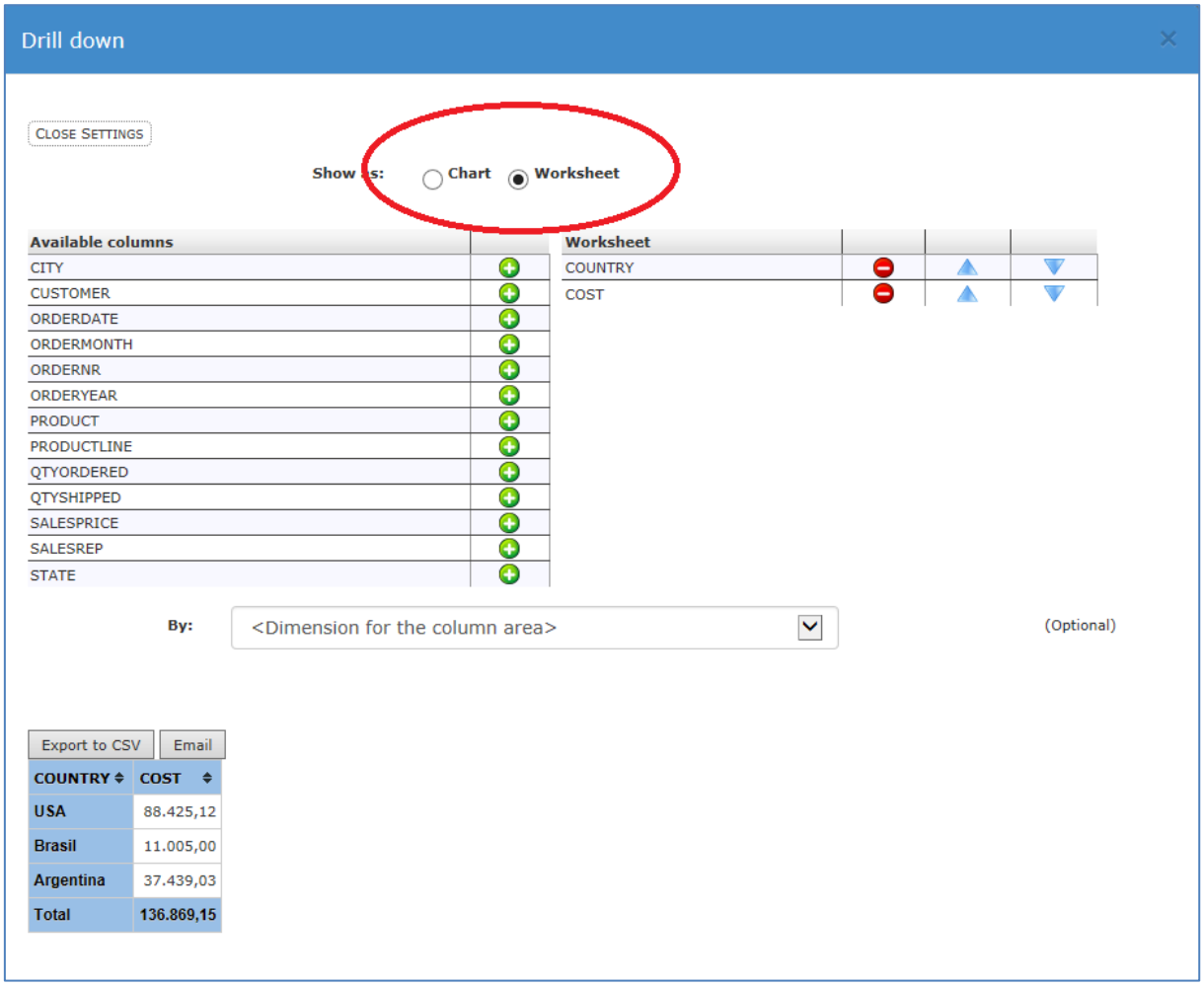

Figure 23 - Drill down on worksheet

When selecting this option, a list of available columns will be displayed on the left side, a list of used columns on the right side and the sheet will be displayed below.

To add columns at the worksheet, simply click on the green icon next to the respective column available. To remove a column, click the red icon in column list on the right.

To change the display order of each column, click on the blue **arrows up** or **down** in the list to the right.

To export the worksheet to a CSV file, simply click the "Export to CSV" button. The following screen will appear:

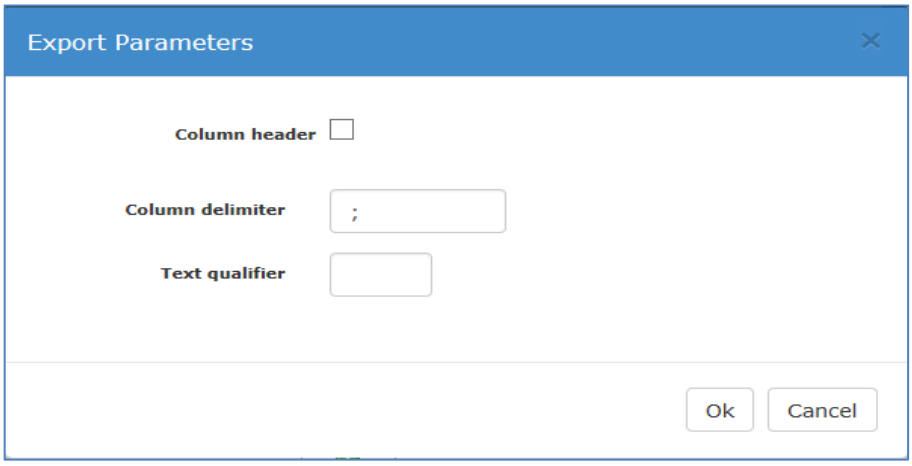

Figure 24 – Export parameters screen

- **Column header:** Check box to export the header.
- **Column delimiter:** Field to inform the column delimiter. The default value is ";"
- **Text qualifier:** Field to inform the text qualifier, if it is necessary.

After setting up the desired options, simply click "OK".

To send the CSV file by e-mail, click on "Email" button and the screen below will appear:

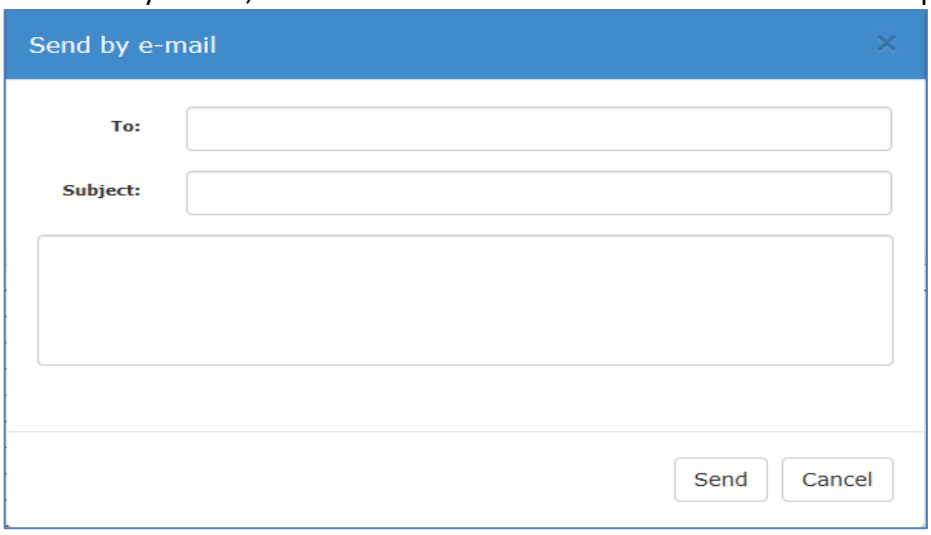

Figure 25 - Send worksheet by e-mail

3.7 Navigation to a BXBanalytics view

Figure 26 - Navigation to BXBanalytics

In this item, it's possible to open a view in BXBanalytics according to the related view set in the edit object screen. If the user doesn't have access permission for BXBanalytics, this item will not be shown. If the object doesn't have a related view:

a) for *Viewer edition* users this icon will not be shown.

b) and a *Personal or Professional edition* user clicks on this icon, BXBanalytics will open with a list of views from the cube of the dashboard's object or, if there are no views available, a new view will be opened according to the dimensions and measures selected for the object.

3.8 Data infos and cube reload

If the user has permission to load the cube, it's possible to update the cube from a chart or gauge in the dashboard. The load permission is assigned in the module "**Database**", as seen in the screen below:

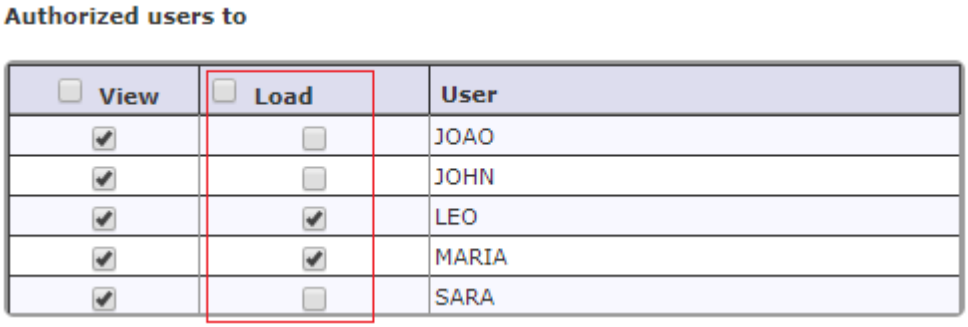

Figure 13 - Load permissions

When the ***Cube infos*** icon has an ***"i"***, it means that the user will only see the name of the respective cube and some information about the last cube load run, but cannot reload the data of the cube.

Figure 30 – Without load permission

If the ***Cube infos*** icon is displayed as illustrated below, it means that the user can see the same information and has the possibility to update the data of the respective cube.

Figure 31 – Cubes info icon with load permission

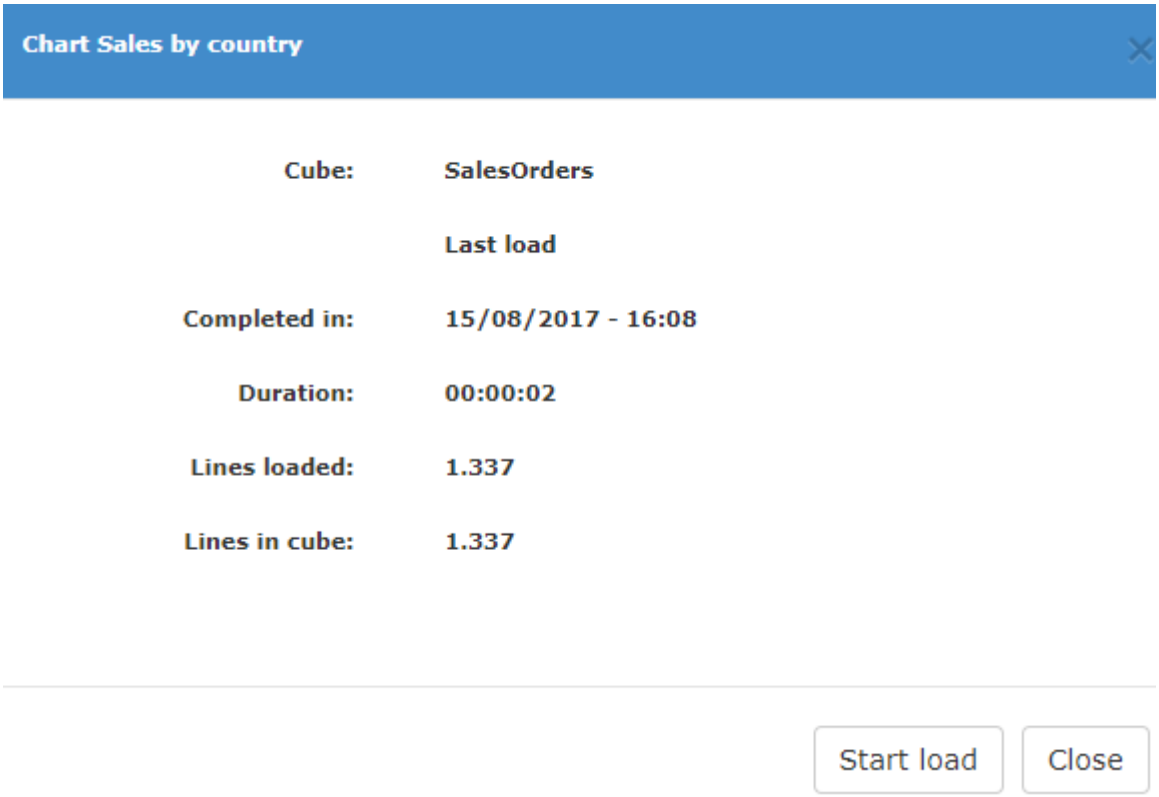

Figure 32 – Cube last loading infos with reload option

In both cases an info box will be displayed, but the “Start load” button will be available only if the user has the load permission. Clicking this button, the cube update process will start.

3.9 Settings

Figure 33 - Settings icon, for editing the object

Clicking this icon the “Edit object” (see *figure 10* or *17*) screen will be opened.

All fields can be edited as presented at the **3.3 New Gauges** and **3.4 New Charts** topics.

3.10 Removing objects from a dashboard

Figure 14 – Remove Object Button

A click on the "X" icon will remove the selected chart or gauge from the dashboard.

3.11 Filters

Filters can be applied to the entire dashboard or only to some gauge or chart. To apply a filter to the entire dashboard, click on the *Filters* menu and select the *Ad hoc filter* option.

To apply a filter on a simple object (gauge or chart), you may click on this object and then a little toolbar will appear. In this toolbar click on the funnel icon and the filter screen will be shown.

3.11.1 Ad hoc filter

The filter screen will be displayed (like illustrated in the *Figures 31-33*), where you can select the column to be filtered and the selection method, as follows:

- ***Range:*** The fields ***From*** and ***To*** can be filled with numeric values, alphanumeric data or dates. Clicking the button ***Filter***.
- ***Pattern:*** allows using the character "%" as a wildcard before and/or after the desired criterion. For example: filling this field with %store% for the column “Customer” and clicking the button ***Filter***, all the customers that have the word “Store” in any part of the name will be displayed.
- ***Selection List (discrete)***: Element by element. This option will only be shown if the total of items is equal or less than the quantity set in the field **“**Max. qty of members for filter list (discrete selection)”, found in the user settings.

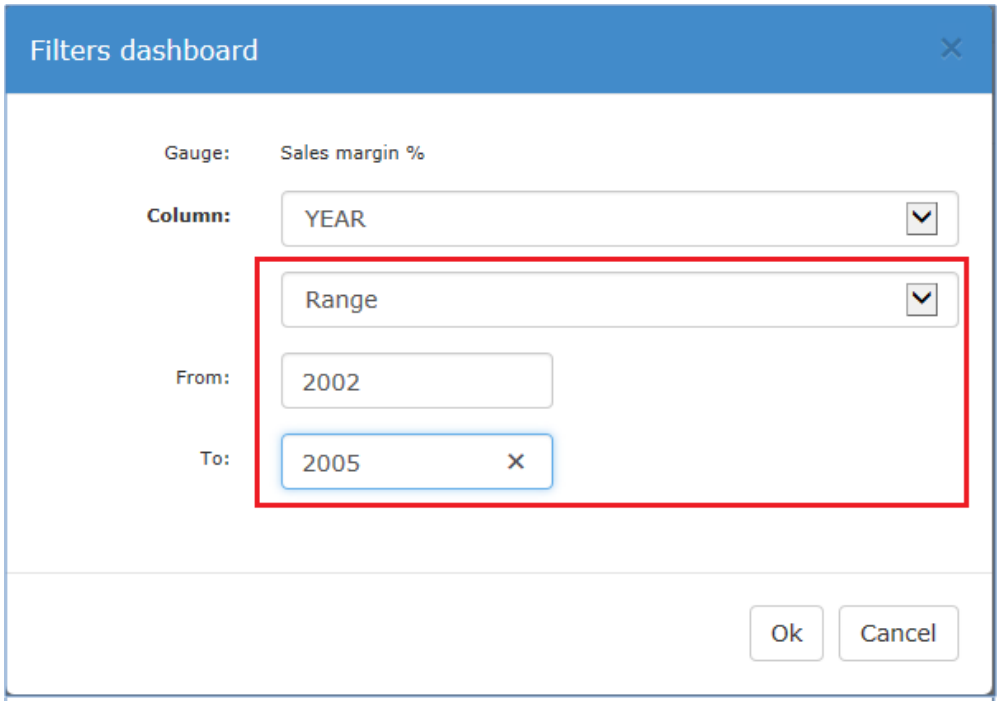

Figure 15 - Filter screen by range

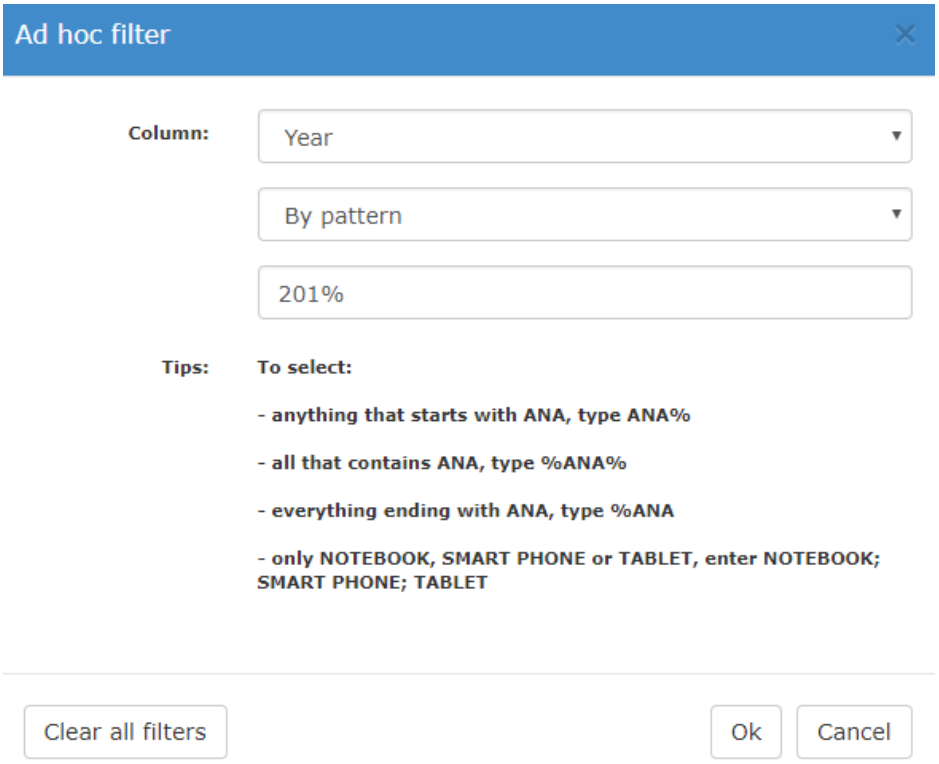

Figure 37 - Filter screen by pattern

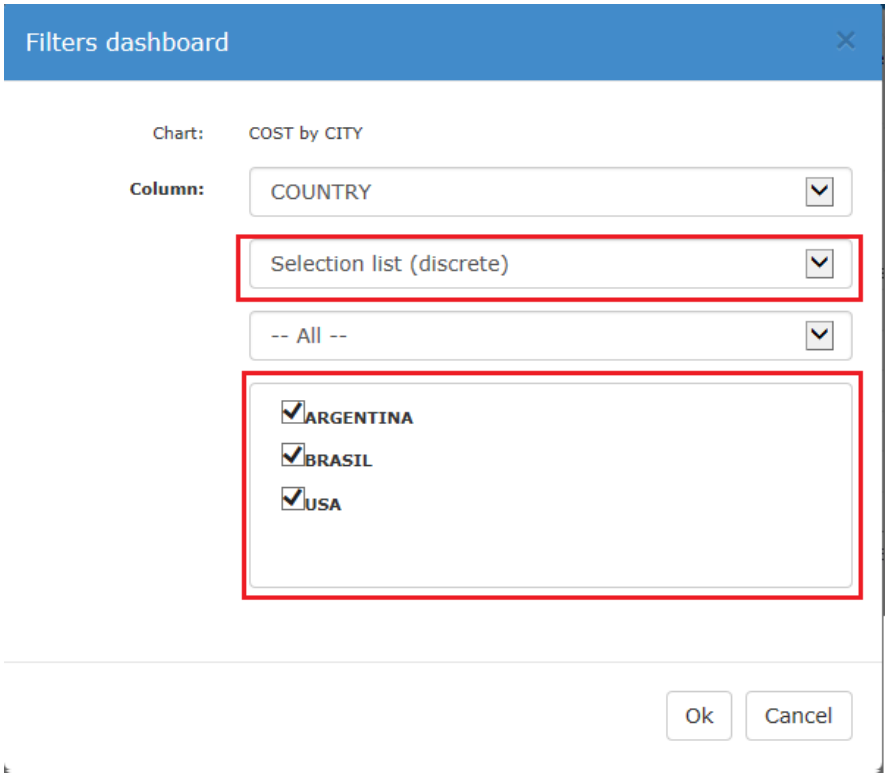

Figure 38 – Filters screen by Selection list

To confirm and conclude the operation, click on the ***Ok*** button.

3.11.2 Set initial filter

This option allows configuring a filter (Figure 34) to be applied by opening the dashboard, before loading the cube's data, where the user can use the filter window illustrated in Figures 40.

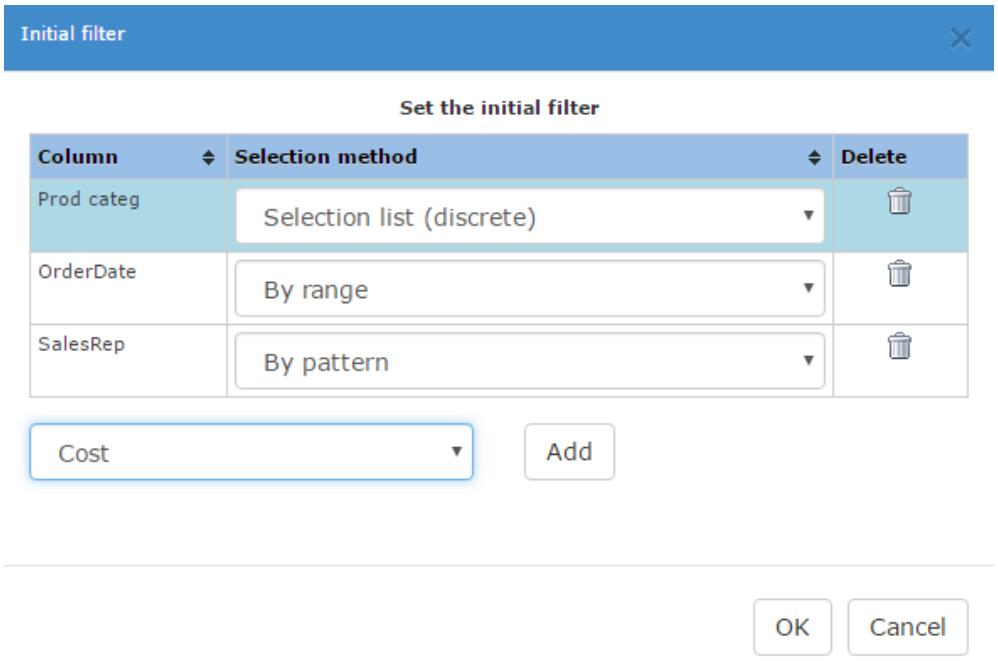

Figure 39 – Initial filter set up window

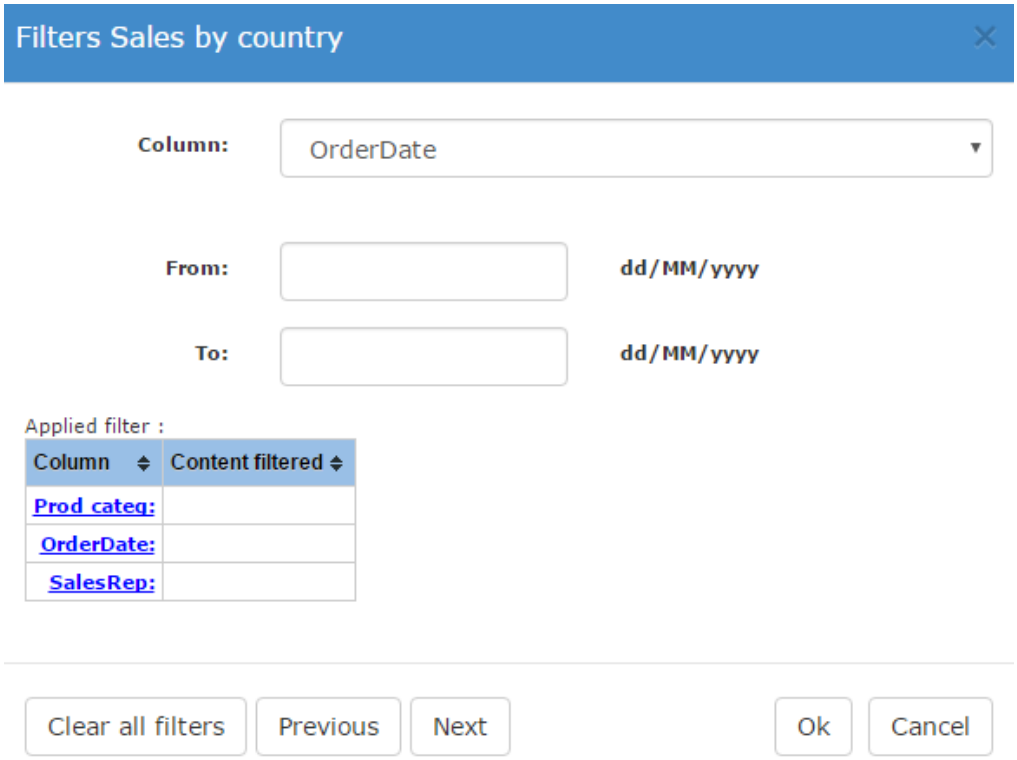

Figure 40 – Initial filter window for the end user

3.12 Exporting a dashboard to .PNG

Option to save the selected dashboard into a *PNG* format file, considering the selected filters. To export it, just click on the ***Export*** > ***PNG*** menu option.

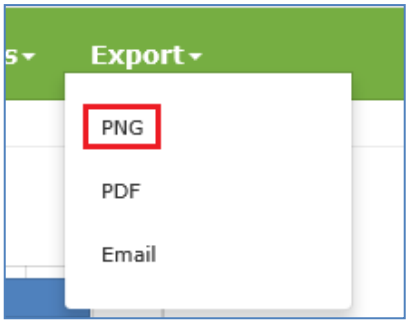

Figure 41 – Export dashboard to .PNG

3.13 Exporting a dashboard to PDF

Option to save the selected dashboard into a *PDF* format file. It will also consider the configured filters for the dashboard. To export it, click on the ***Export*** > ***PDF*** menu option

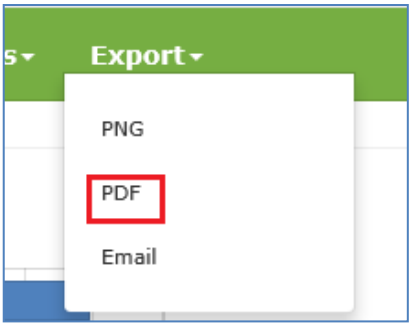

Figure 42 - Export dashboard to PDF

and the following screen will be shown:

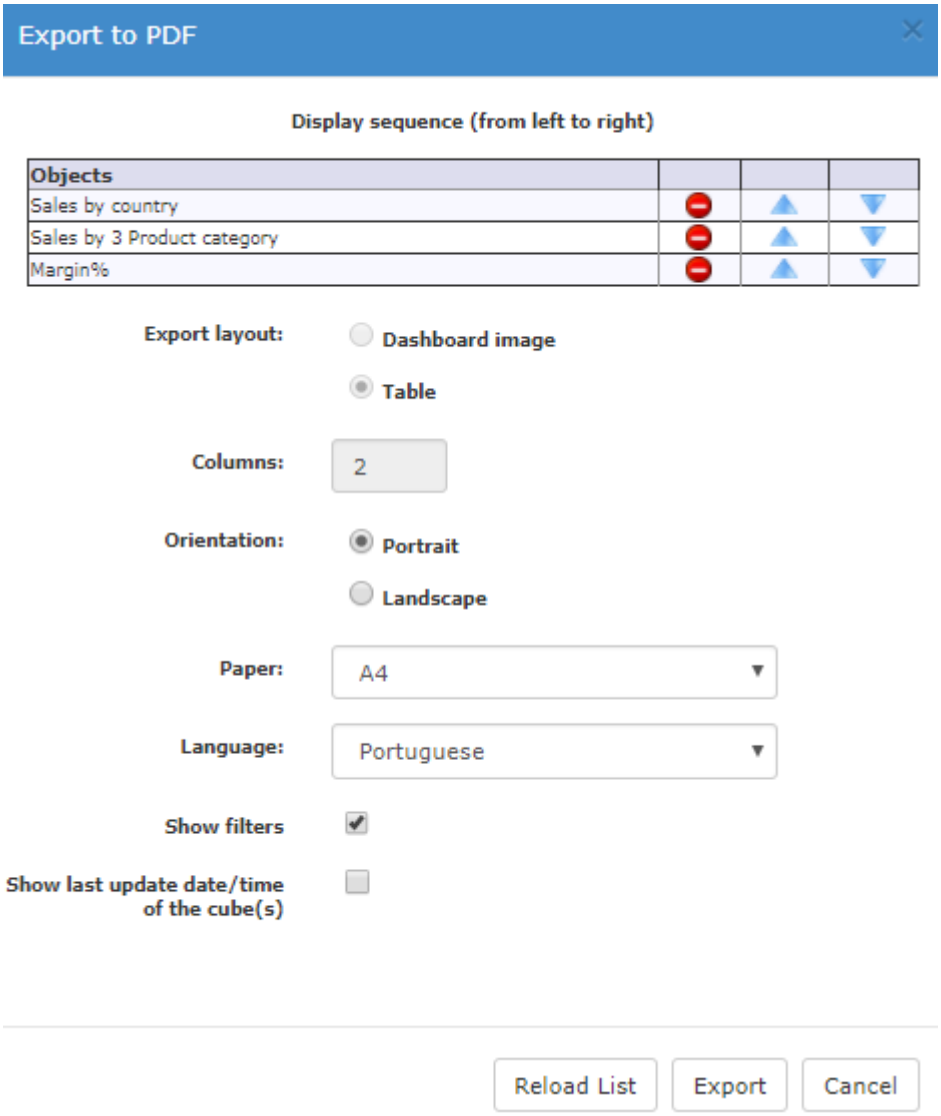

Figure 416 – Export to PDF set up screen

In this screen it's possible to remove and reorder the charts and gauges to be exported. If you want to "rescue" some removed objects or include objects newly inserted to the dashboard, click the "**Reload List**" button.

It's possible to choose between portrait or landscape orientation for exporting, as well as to define whether exporting it in the way the objects are arranged in the dashboard (by choosing "Dashboard image") or in a table format. If the option you select is "Table" you can change the quantities of table columns in the "Columns" field.

On "Paper" field you may set the respective paper size.

After configuring the exporting, click the "**Export**" button to generate the PDF file.

3.14 Sending PNG by e-mail

Option to send a picture at.PNG format from the selected dashboard to the destination e-mail you want. To do this, simply click on the *"Send by Email"* button and fill in the *"To"* and *"Subject"* fields.

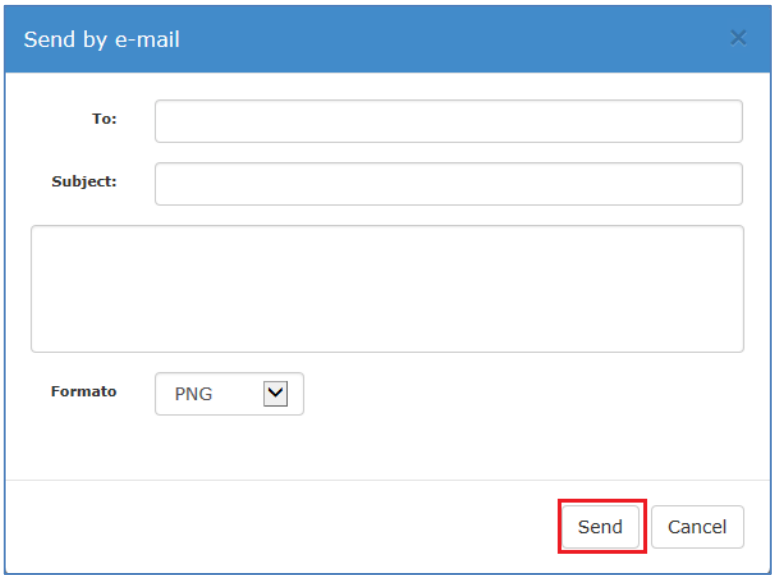

Figure 44 – Send dashboard by e-mail

3.15 Permissions

The ***"Permissions"***button shows the users list and allows defining which users will have access to the selected dashboard.

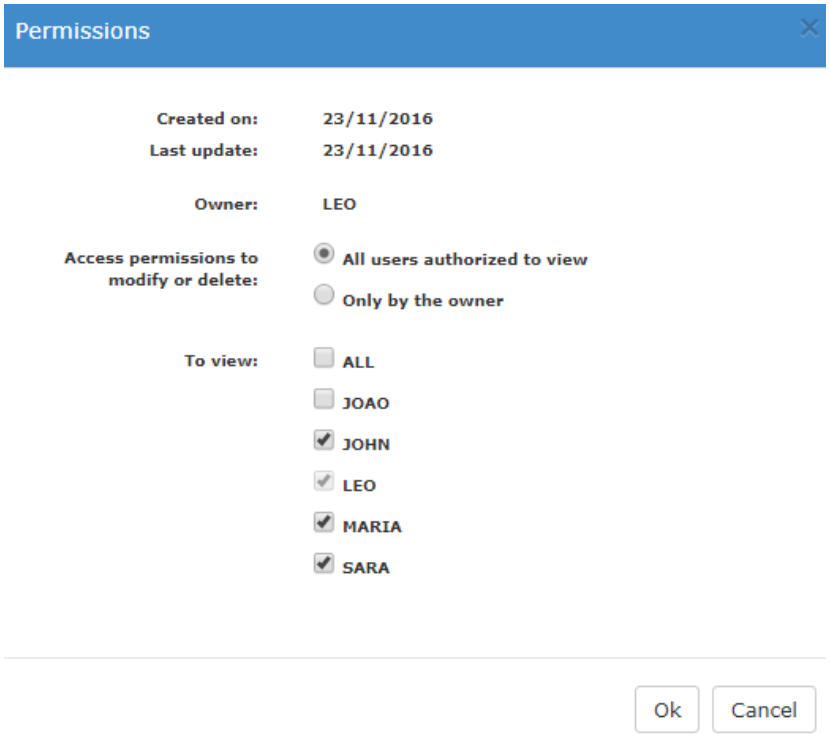

Figure 45 - Permissions

3.16 Hiding a dashboard

If you don't want to have a specific dashboard displayed on the screen, just click on the "x" near the name of the dashboard, which appears on the respective tab.

This operation transfers the hidden dashboard to the list of available dashboards which can be viewed, changed or deleted by clicking on the ***"Dashboards"*** button of the toolbar.

3.17 Renaming a dashboard

To change the name of a dashboard, click on the ***"Settings"*** button of the toolbar. At the opened window, change the name and click "***Save***".

3.18 Interval for automatic update

If you want to leave the dashboard opened on the screen with automatic data update:

- It will be necessary to schedule the cube load/update process, preferably in the same interval that a screen refresh is desired;
- The option ***"Settings"*** of the toolbar menu opens a window that also allows configuring how often (in minutes) the screen should have its data updated. Filling with 0 (zero) in this field, there is no automatic update, remaining on screen the data displayed on the dashboard at the time it has been opened.

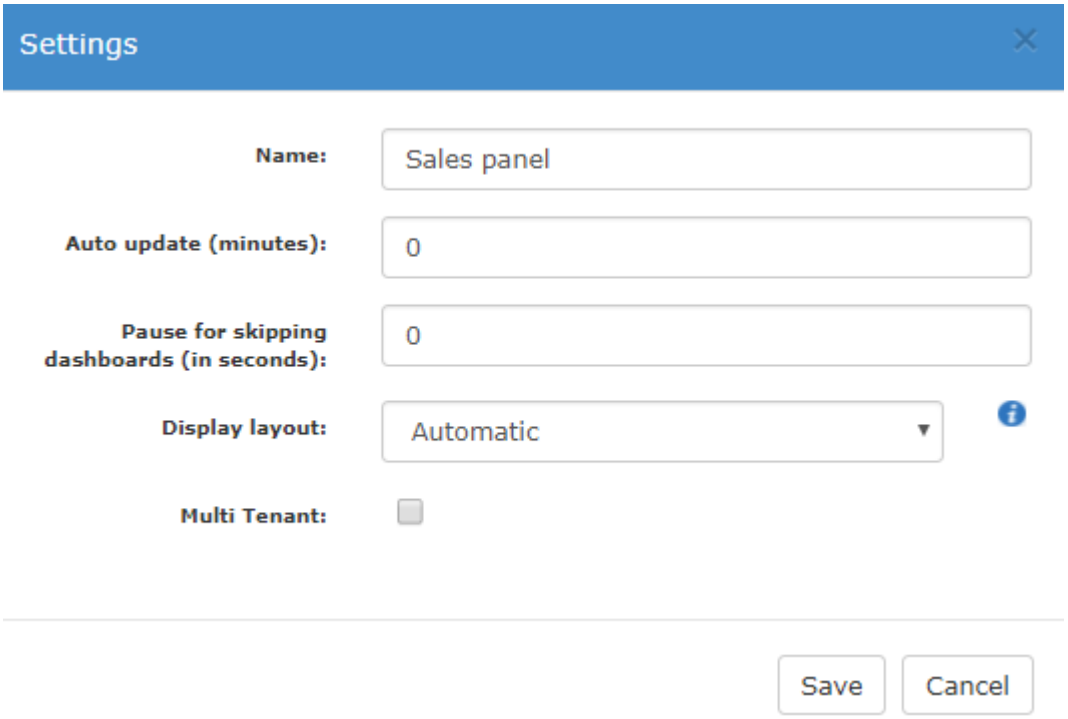

Figure 46 – Dashboard settings

Note: The auto refresh process only happens on the dashboard that is being displayed (where the objects are being viewed).

3.19 Pause for skipping dashboards

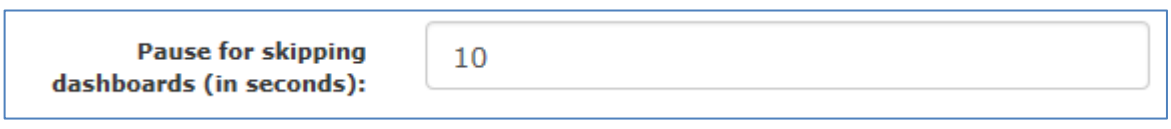

Figure 47 - Pause for skipping dashboards

The interval for skipping dashboards can be set for each dashboard, but it will work only when the value set in the user settings screen is different from zero.

If the value for the dashboard is 0 (zero), it will be considered the informed value in the user settings screen.