

DASHBOARDS

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FILTERS & DASHBOARDS


The Filter, which is added to a Dashboard Template has the following additional properties:

- **Category** allows assigning the filter to any of existing filter categories. Useful when the Dashboard Template has a lot of filters to help categorize them into panels.
- **Multi-Select** applicable only to list filters. Allows multiple list items selection.
- **Default Date Range Preset** applicable only to Date Range filter. Allows to select a dynamic default value, e.g. Last Week selected will always show the previous week.
- **Default Date Preset** applicable only to Date filter. Allows to select a dynamic default value, e.g. Yesterday selected will always show the previous date.
- **Required** defines if the Filter value required to be defined in the particular Dashboard Template. If Required is selected, Default Value selection is required.
- **Default Value** has to be defined for all required filters. For Date Range would be automatically defined if Default Date Range Preset is selected.
- **Hidden** allows the administrator to hide a Filter from end users. This means that the filter value will be applied but the filter itself will not be visible on the Dashboard Template.

FILTER (List)

CATEGORY	▼
MULTI-SELECT	<input type="checkbox"/>
REQUIRED	<input type="checkbox"/>
DEFAULT VALUE	<input type="text"/>
HIDDEN	<input type="checkbox"/>

FILTER (Date Range)


DATE RANGE	
DEFAULT PRESET	
CATEGORY	▼
REQUIRED	<input type="checkbox"/>
DEFAULT VALUE	<input type="text"/>
HIDDEN	<input type="checkbox"/>

FILTER (Numeric)

CATEGORY	▼
REQUIRED	<input type="checkbox"/>
DEFAULT VALUE	<input type="text"/>
HIDDEN	<input type="checkbox"/>


REPORT 1 	REPORT 2 
REPORT 3 	REPORT X 

DASHBOARD TEMPLATE 1



All required filters default values will be automatically applied to the Dashboard Template on NEW.





The Filters added into a category will be grouped by the category in the dashboard template filter menu.

 DASHBOARD TEMPLATE 1

FILTER CATEGORY 1

FILTER (List)	FILTER (Date Range)
CATEGORY	DATE RANGE DEFAULT PRESET
MULTI-SELECT	CATEGORY
REQUIRED	REQUIRED
DEFAULT VALUE	DEFAULT VALUE
HIDDEN	HIDDEN

FILTER (Numeric)
CATEGORY
REQUIRED
DEFAULT VALUE
HIDDEN

REPORT 1	REPORT 2	REPORT 3	REPORT X
			

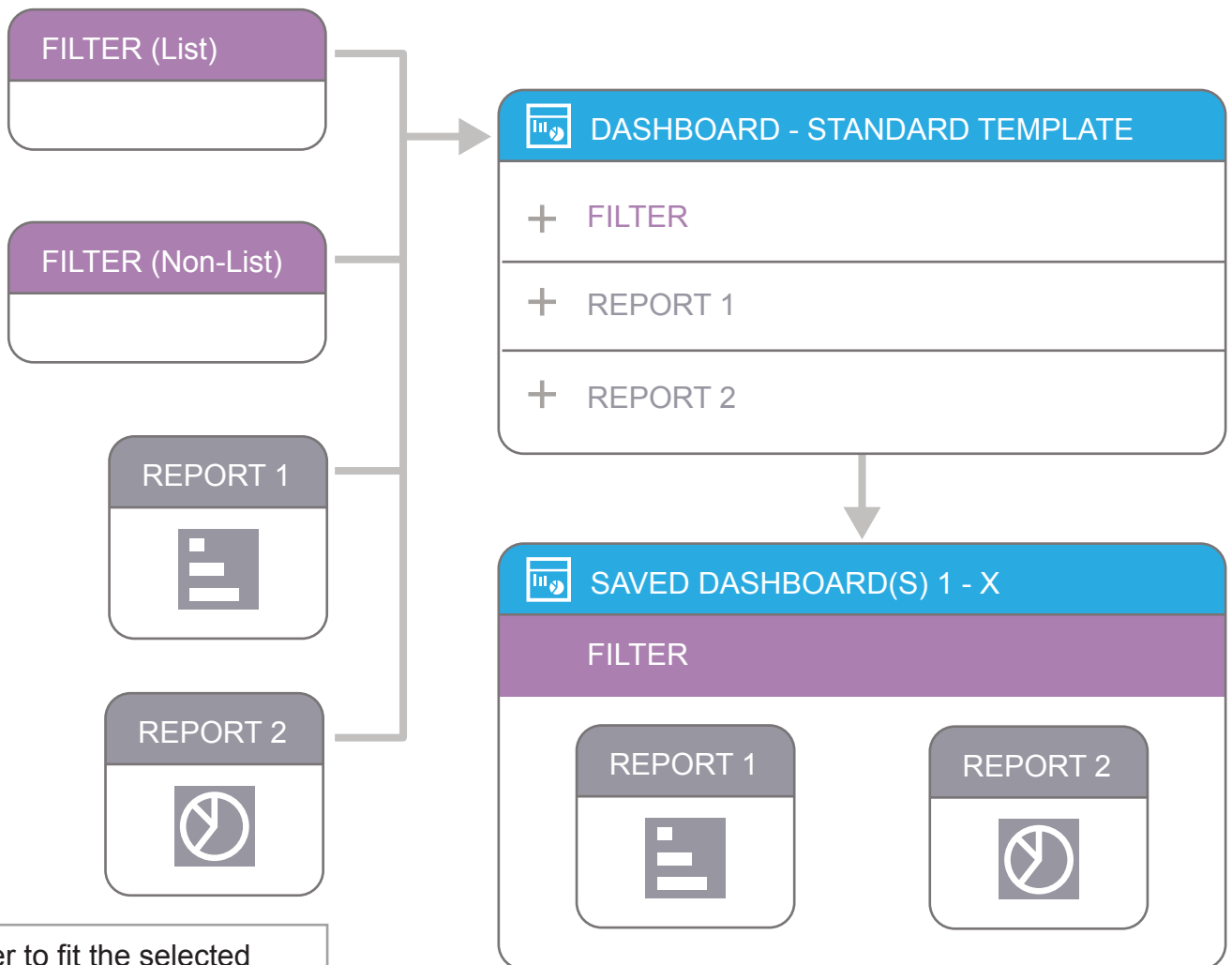
STANDARD LAYOUT

DASHBOARD EXPERIENCE

STANDARD LAYOUT is the most basic layout for a Dashboard Template.

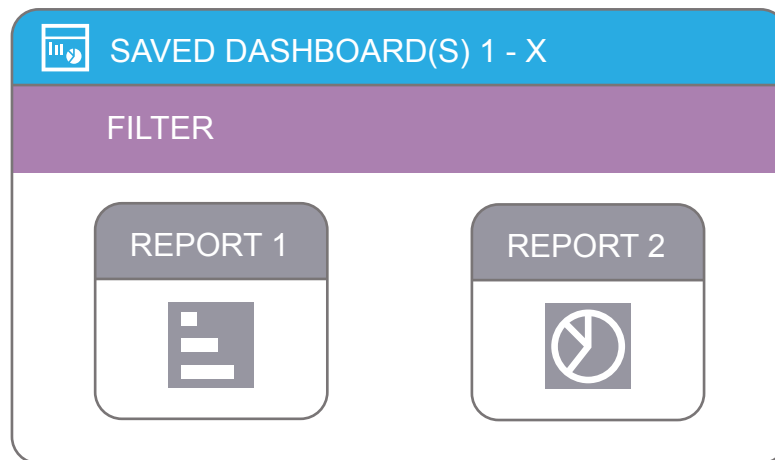
It displays multiple reports simultaneously but does not support COMPARISON FILTERS or "Repeat Reports".

STANDARD LAYOUT supports Fixed and Responsive layout types.



In order to fit the selected dashboard layout type, each report can predefine width and height.

SAVED DASHBOARDS



SAVE DASHBOARD is a feature within the dashboard template which allows you to save predefined reports and filters.

Each time the Saved Dashboard is visited it restores the state of all reports and filters based on the last save made.

Each dashboard template can have multiple Saved Dashboards by multiple users. The Saved Dashboards can also be shared with specified users.

The Saved Dashboard itself is editable and can be resaved as a new Saved Dashboard.

SINGLE REPORT / PICK A REPORT

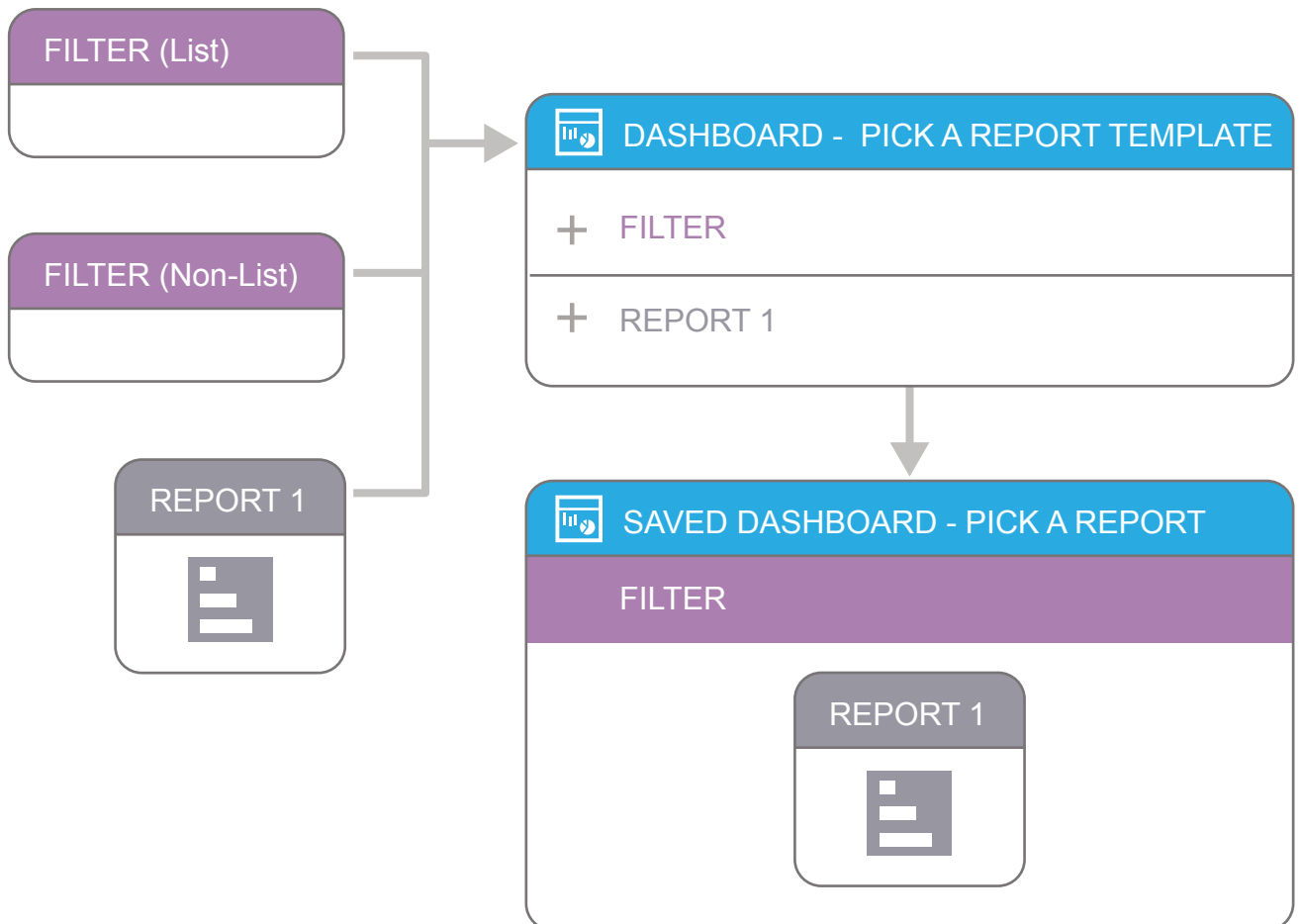
DASHBOARD EXPERIENCE

SINGLE REPORT and PICK A REPORT dashboard templates do not support COMPARISON FILTERS.

SINGLE REPORT - provides only one report within its dashboard template which will display automatically.

PICK A REPORT - provides one or more reports assigned to the dashboard template.

Both support only fixed layout type.



COMPARISON FILTER

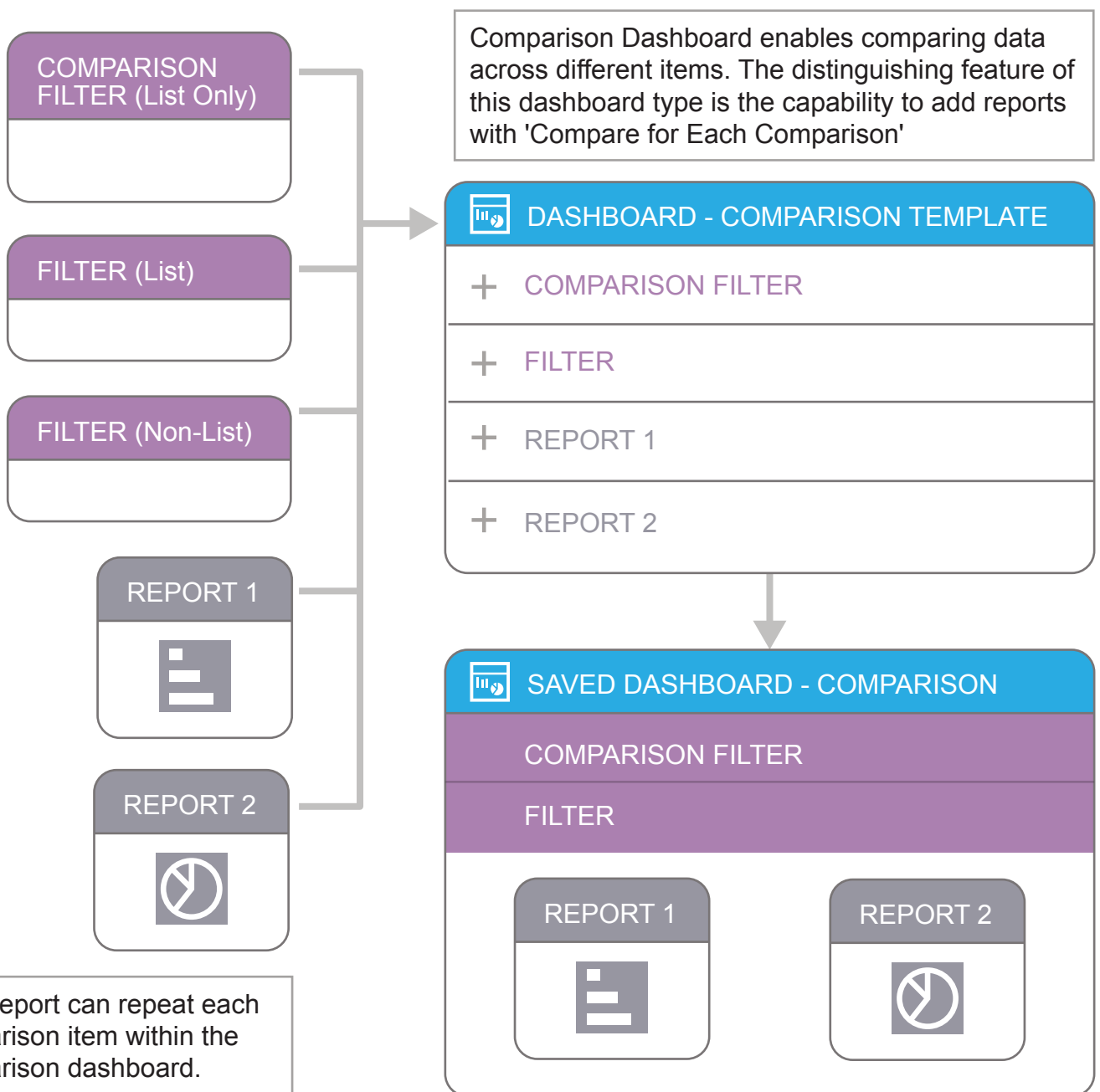
DASHBOARD EXPERIENCE

Filter types (2): Comparison and Non-Comparison

This type of dashboard can repeat a report for each selected comparison item. In order to use this feature, these reports should set `@DATASET_PARAMETER` with the same name as the `@FILTER_VARIABLE` name from `COMPARISON_FILTER`

Layout types (2): Fixed and Responsive

This option provides for predefined content area width for the display of reports.



DASHBOARD CATEGORIES

Dashboard Templates itself also support categorization - any Dashboard Template can be added to a category.

Each Dashboard Template has its own security settings, User must have access to at least one Dashboard Template, included into the category in order to have access to the Dashboard Templates Category.

Dashboard Template categorization allows content separation between different users groups (e.g. marketing and sales departments)

