

DASHBOARDS

FILTERS & DASHBOARDS


The Dashboard Template's 'Filter' feature has the following additional properties:

- **Category** Enables assigning the filter to any of existing filter categories. Most useful to categorize many filters within a Dashboard Template into panels.
- **Multi-Select** Specifically for the 'List' filter enables selection of multiple items from a list.
- **Default Date Range Preset** Specifically for the 'Date Range' filter. Enables selecting a dynamic default value, e.g. selecting 'Last Week' will display the previous week.
- **Default Date Preset** Specific to the 'Date' filter. Enables selecting a dynamic default value, e.g. selecting 'Yesterday' will show the previous date.
- **Required** Determines whether or not the Filter value in the Dashboard Template is required. If 'Required' is selected, Default Value selection is required.
- **Default Value** Must be defined for any Required filter. If Default Date Range Preset is selected the 'Date Range' is automatically defined.
- **Hidden** Enables the administrator to hide a Filter from the view of users. The Filter value will be applied but the filter itself will be invisible 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 default values in Filters will be automatically applied upon creating a NEW Dashboard Template.





Filters added into a category will be grouped accordingly in the Dashboard Template filter menu.

 DASHBOARD TEMPLATE 1

FILTER CATEGORY 1

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

FILTER (Numeric)
CATEGORY
REQUIRED
DEFAULT VALUE
HIDDEN

REPORT 1	REPORT 2	REPORT 3	REPORT X
			

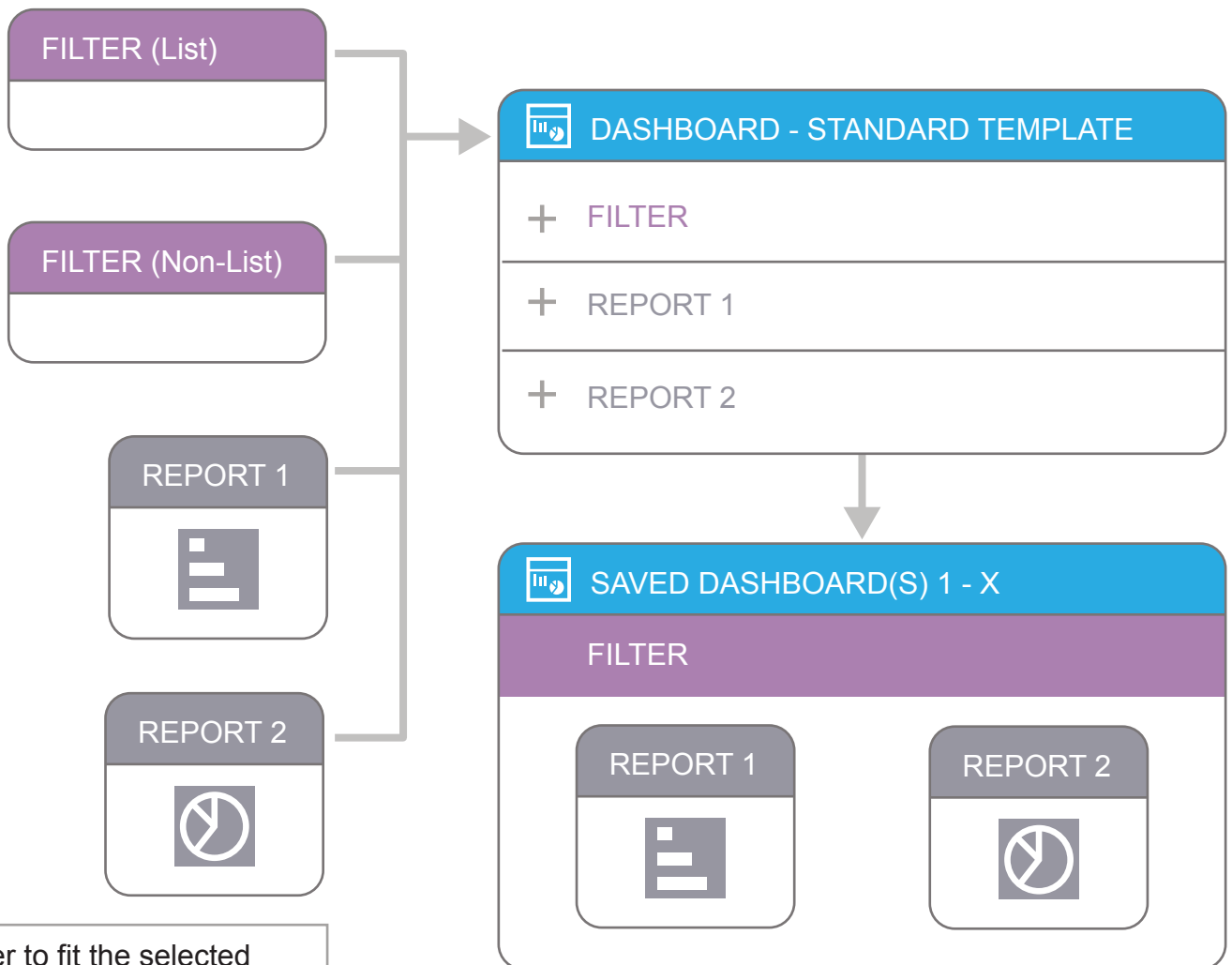
STANDARD LAYOUT

DASHBOARD EXPERIENCE

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

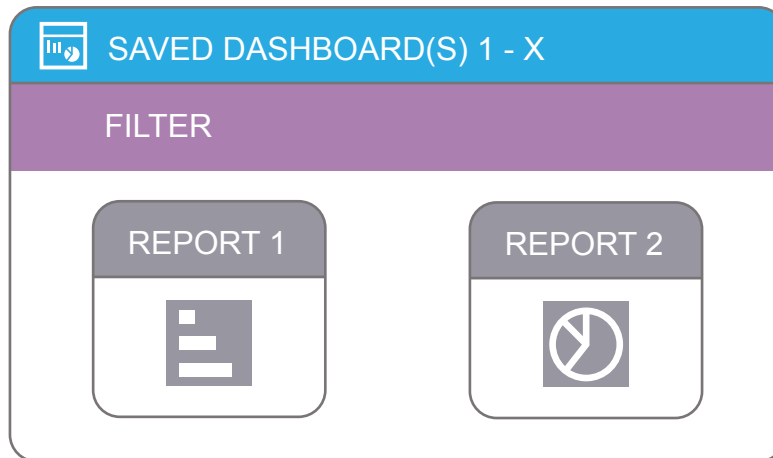
It displays multiple reports simultaneously but does not support COMPARISON FILTERS or "Repeat Reports".

STANDARD LAYOUT supports Fixed-width and Responsive layout types.



In order to fit the selected dashboard layout type, each report has predefined width and height options.

SAVED DASHBOARDS



The SAVE DASHBOARD feature within the dashboard template enables saving 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. Each saved Dashboard 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

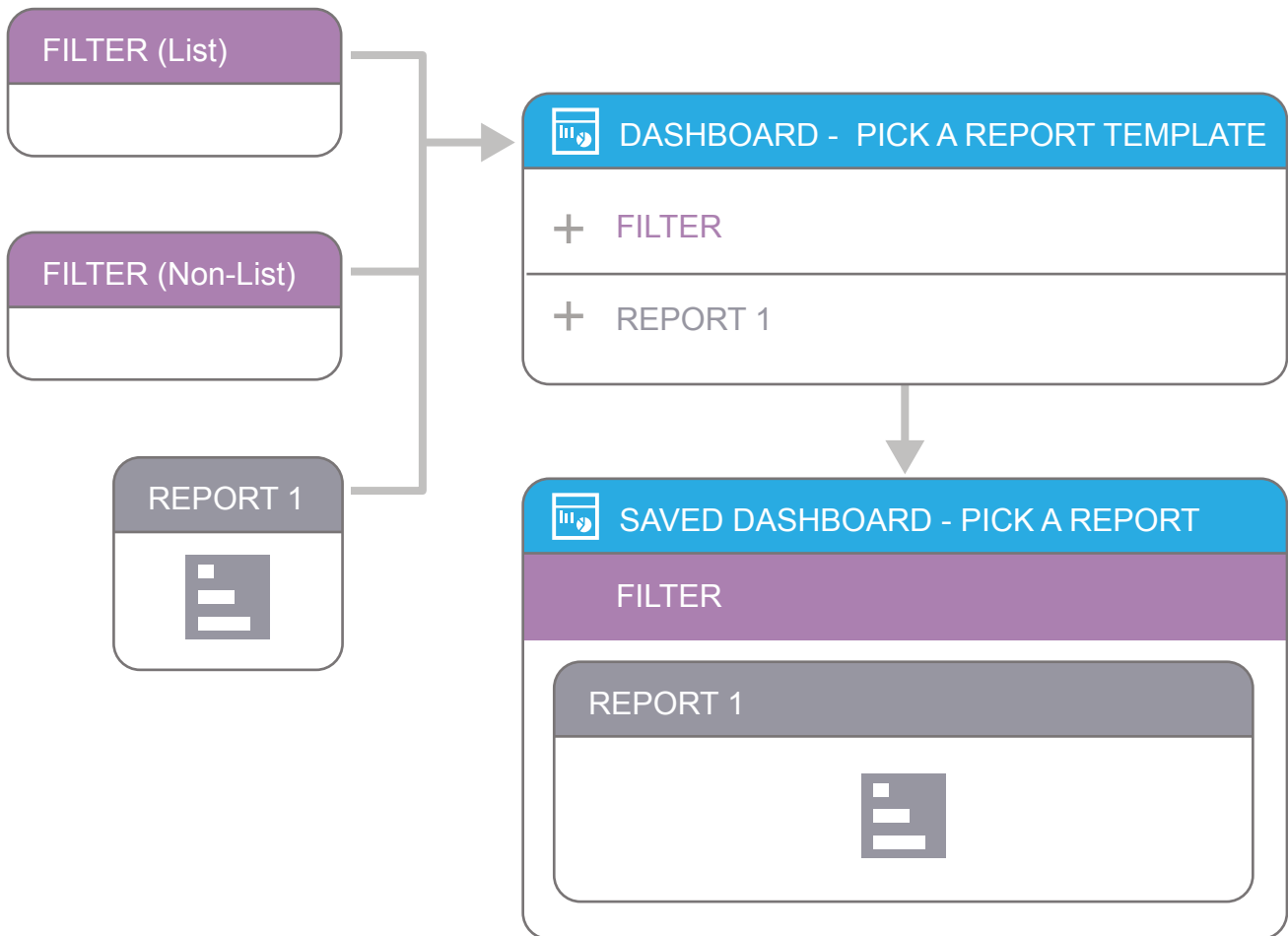
DASHBOARD EXPERIENCE

Neither of these two templates support COMPARISON FILTERS.

SINGLE REPORT - provides only one report within its Dashboard Template which displays automatically.

PICK A REPORT - Functions similar to the 'Single Report' dashboard, however a default report is not automatically displayed. User is required to choose one of the reports assigned to the dashboard template.

Both types only support a Fixed-width layout type.



COMPARISON FILTER

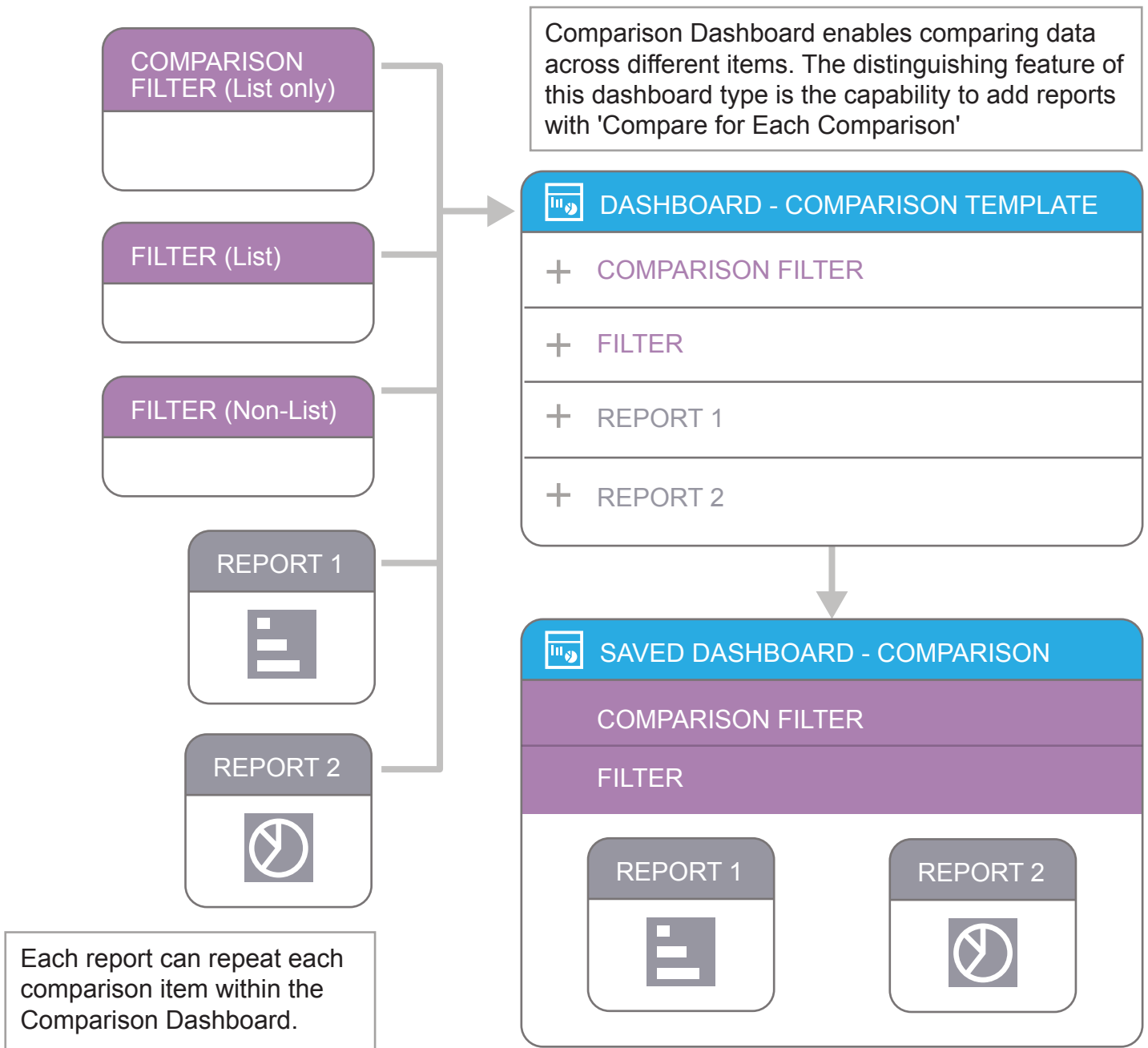
DASHBOARD EXPERIENCE

Filter Types: Comparison and Non-Comparison

This dashboard type provides the feature of repeating 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: Fixed-width and Responsive

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



DASHBOARD CATEGORIES

Dashboard Templates 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 in a specified category in order to access said Dashboard Templates Category.

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

