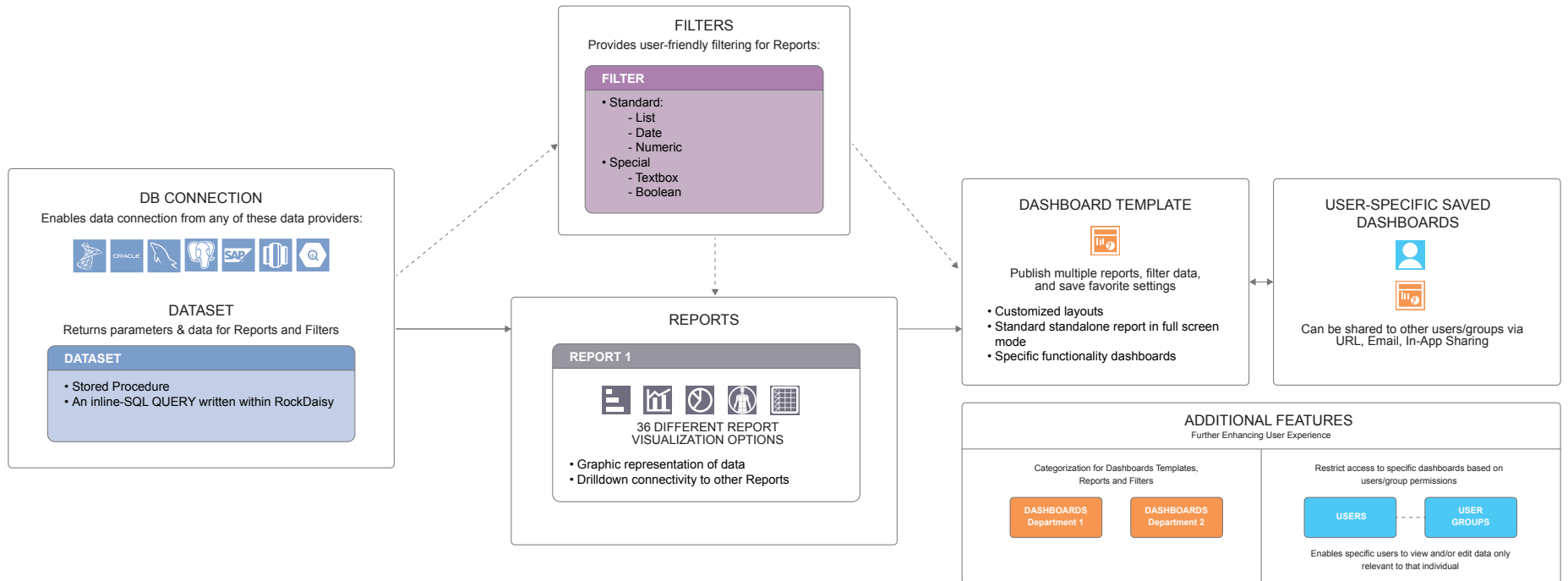


# ROCK DAISY

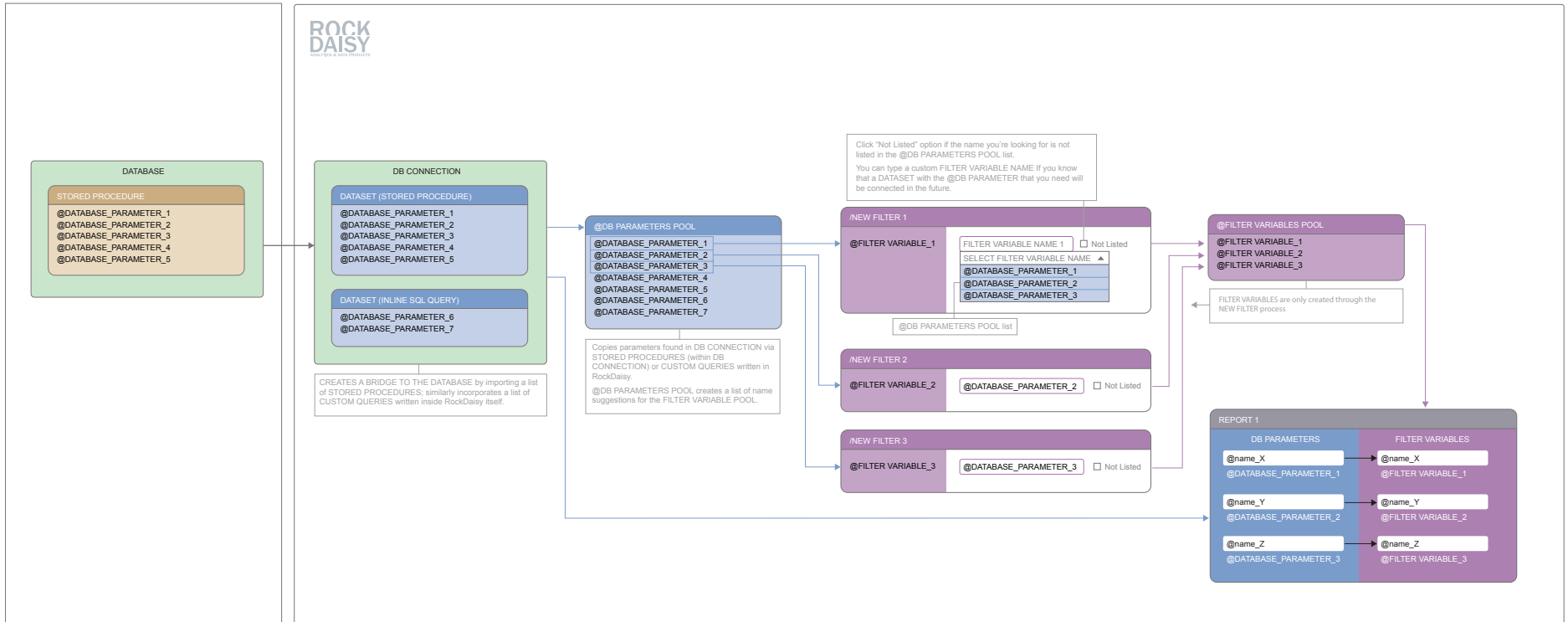
ANALYTICS & DATA PRODUCTS

DOCUMENTATION

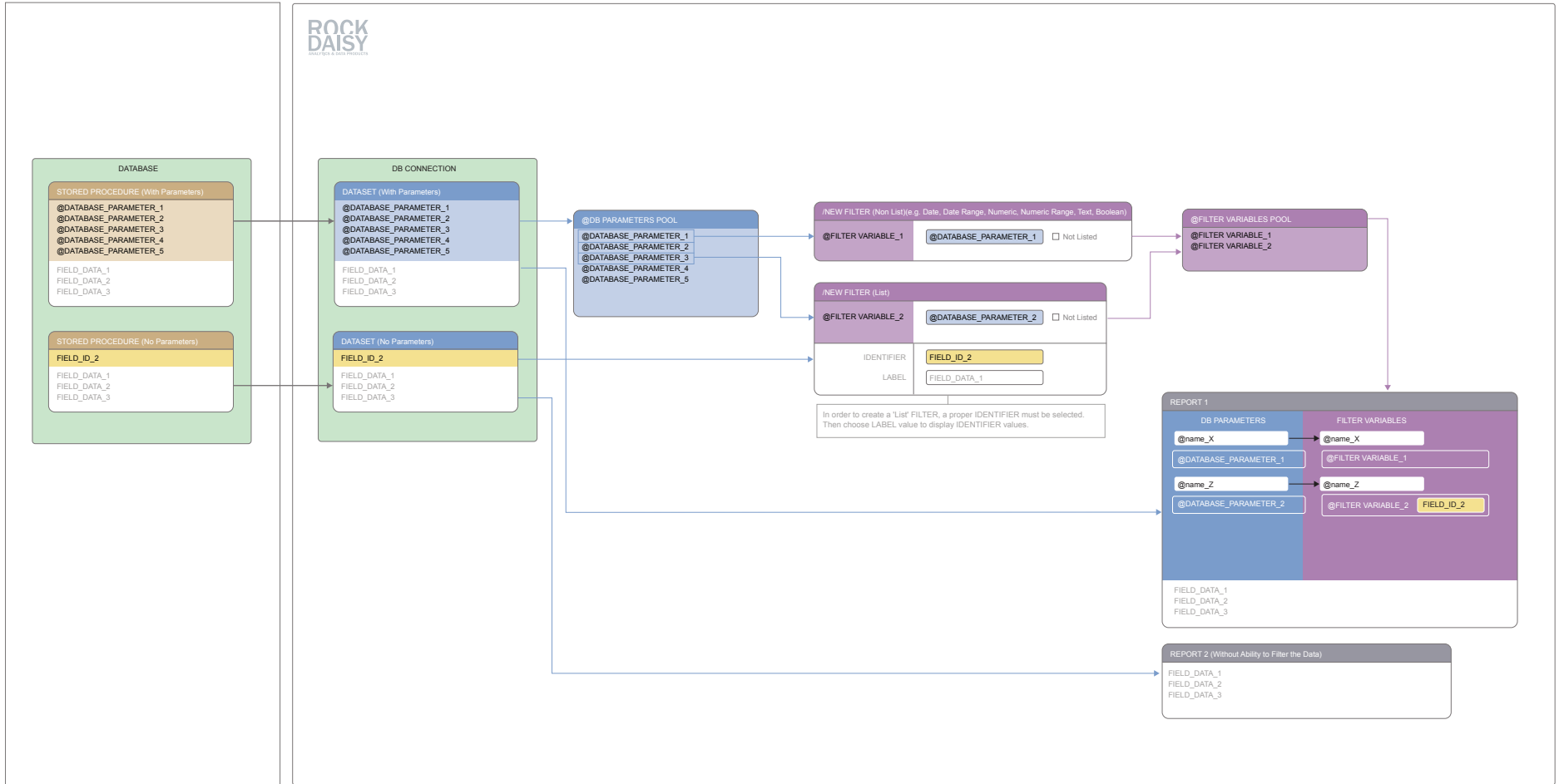
## PLATFORM COMPONENTS OVERVIEW



# FILTERS OVERVIEW



# FIELDS FLOWCHART



# FILTERS

# LIST FILTERS


A LIST FILTER should return a list of items for filtering.

The STORED PROCEDURE/CUSTOM QUERY connected to a LIST FILTER should not contain any @DATABASE\_PARAMETERS.

To filter REPORT data, all filtering logic must be contained in the STORED PROCEDURE/CUSTOM QUERY connected to the REPORT.

To add multi-select filtering functionality, please use the fnSplit function, e.g.:  
JOIN dbo.fnSplit (@Parameter, ',') a ON Table.FieldName = a.item

LIST
DATASET
IDENTIFIER
LABEL
Pass @Filter_Variable as Identifier comma-separated, e.g.: 1, 2,3

LIST with IMAGE
DATASET
IDENTIFIER
LABEL
 IMAGE URL
Pass @Filter_Variable as Identifier comma-separated, e.g.: 1, 2,3

# NON-LIST FILTERS

Non-List Filters do not require an additional dataset to create the filter.

## DATE-RELATED FILTERS

### DATE

Date value is passed in UTC format by DATE filter e.g.:

```
2018-01-01T00:00:00.000Z;
```

Within the report's dataset:

```
CAST (@Filter_Variable AS DATE)
```

### DATE RANGE

Passing @Filter\_Variable as CAST AS DATE is required for DATE RANGE filter.

Example within a dataset:

```
DECLARE @StartDate DATE
DECLARE @EndDate DATE
SELECT @StartDate = MIN(CAST (item as DATE)),
@EndDate = MAX(CAST (item as DATE)) FROM
dbo.fnSplit(@GameDate, ' - ') as a
```

Pay attention to the delimiter in fnSplit function, it is '-' for DATE RANGE

## NUMERIC-RELATED FILTERS

### NUMERIC

Numeric filter value is passed as a number.

### NUMERIC RANGE

Example within a dataset:

```
DECLARE @startNumber float
DECLARE @endNumber float
SELECT @startNumber = min(cast(item as float))
FROM dbo.fnSplit(@NumericRange, ' - ') x
SELECT @endNumber = max(cast(item as float))
FROM dbo.fnSplit(@NumericRange, ' - ') x
```

Pay attention to delimiter in fnSplit function, it is '-' for NUMERIC RANGE (dash includes spaces to the left and right). Negative values are allowed; e.g. '-7 - -2'

## SPECIFIC FILTERS

### TEXT


Textbox filter value is passed as a text.

### BOOLEAN


Boolean filter value is passed as 'true' or 'false.'  
Labels for 'true' and 'false' are customizable.

# COMPARISON FILTERS

COMPARISON LIST
DATASET
IDENTIFIER
LABEL
Pass @Filter_Variable as Identifier comma-separated, e.g. 1, 2, 3

COMPARISON LIST with IMAGE
DATASET
IDENTIFIER
LABEL
 IMAGE URL
Pass @Filter_Variable as Identifier comma-separated, e.g. 1, 2, 3

COMPARISON CARD LAYOUT
DATASET
IDENTIFIER
LABEL
Pass @Filter_Variable as Identifier comma-separated, e.g. 1, 2, 3

COMPARISON CARD LAYOUT with IMAGE
DATASET
IDENTIFIER
LABEL
 IMAGE URL
Pass @Filter_Variable as Identifier comma-separated, e.g. 1, 2, 3

COMPARISON LIST HTML FORMATTED
DATASET
IDENTIFIER
LABEL
</> LIST HTML CARD
</> SELECTED HTML CARD
Pass @Filter_Variable as Identifier comma-separated, e.g. 1, 2, 3



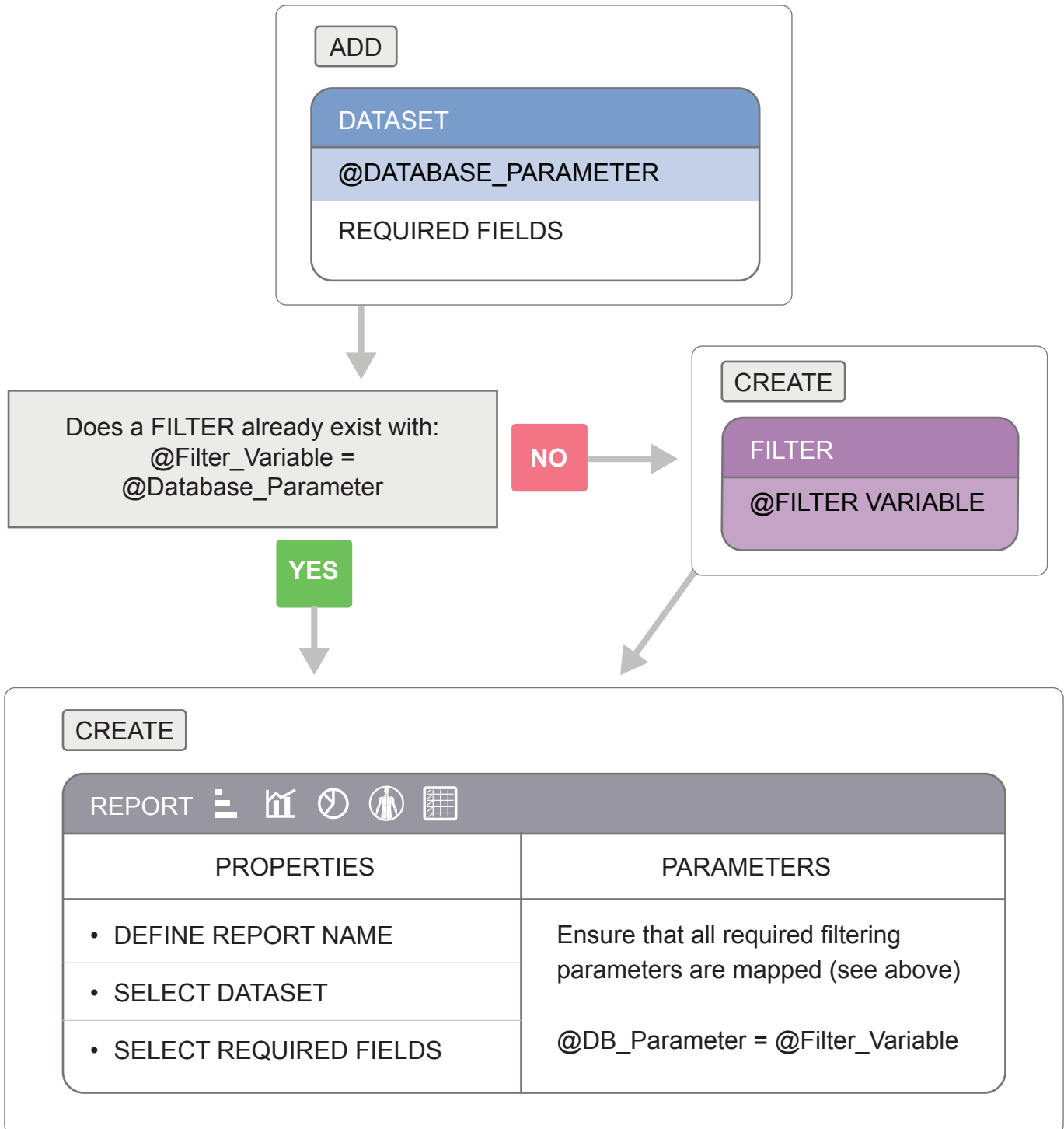
# REPORTS

# REPORTS

All filtering logic starts from the report's Stored Procedure/Query and then utilizes the RD Developer Toolkit's @Filter\_Variable functionality

Appropriate logic to map filter is @Filter\_Variable = @DB\_Parameter

## REPORT CREATION FLOWCHART



# REPORT TYPES

## COMMON CHART

CHART - COMMON
@DATABASE_PARAMETER
METRIC
SERIES

## CLUSTERED CHART

CHART - CATEGORIZED
@DATABASE_PARAMETER
METRIC
SERIES
CATEGORY

## MULTI-SERIES CHART



Multi-Series charts can have multiple axes and series. It is also possible to set a custom color for each series.

MULTI-SERIES CHART
@DATABASE_PARAMETER
METRIC 1...METRIC X (optional)
SERIES 1...SERIES X (optional)
CATEGORY

## TABLE



Make sure that the Dataset does not contain any of the following items within the Field name: blank space, forward slash (/), hash sign (-), leading number characters.

TABLE
@DATABASE_PARAMETER
FIELD 1...FIELD X

## HTML



HTML report should return all content as one row.

HTML	
@DATABASE_PARAMETER	
CONTENT	

## VIDEO



Make sure that the identifier for each video is unique.  
In addition to the MEDIALIST report, RockDaisy supports TVTI and XOS integration.

MEDIA LIST	
@DATABASE_PARAMETER	
IDENTIFIER	
MEDIA LABEL	
MEDIA DESCRIPTION	
VIDEO URL	
THUMBNAIL URL (optional)	

## SCORECARD



SCORECARD data should be passed as one row.  
SCORECARD is one of the Report types which supports sub-items; e.g. each Stat can be added as a sub-item.

SCORECARD	
@DATABASE_PARAMETER	
LEFT LABEL	RIGHT LABEL
MIDDLE LABEL (optional)	
LEFT STAT 1... (optional)	RIGHT STAT 1... (optional)
LEFT STAT X (optional)	RIGHT STAT X (optional)

## KPI



KPI CARD supports sub-items; each Stat can be added as a sub-item (up to five).

KPI
@DATABASE_PARAMETER
LABEL (optional)
IMAGE URL (optional)
BACKGROUND COLOR (optional)
INNER COLOR (optional)
STAT 1... (optional)
STAT 5 (optional)

## BOARD



BOARD supports sub-items; each Stat can be added as a sub-item.

BOARD
@DATABASE_PARAMETER
PRIMARY COLUMN LABEL
AREA LABEL
GROUP LABEL
COLUMN LABEL
CELL ID
CELL LABEL
STAT 1...
STAT X

# DASHBOARDS

# 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)**

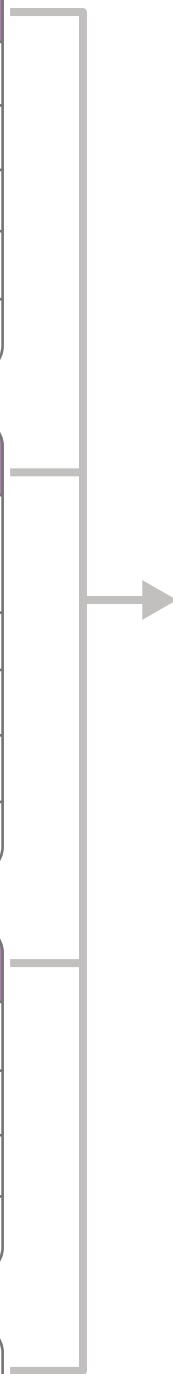

DATE RANGE	
DEFAULT PRESET	
CATEGORY	▼
REQUIRED	<input type="checkbox"/>
DEFAULT VALUE	<input type="text"/>
HIDDEN	<input type="checkbox"/>

**FILTER (Numeric)**

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

<b>REPORT 1</b> 	<b>REPORT 2</b> 
<b>REPORT 3</b> 	<b>REPORT X</b> 


**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
			

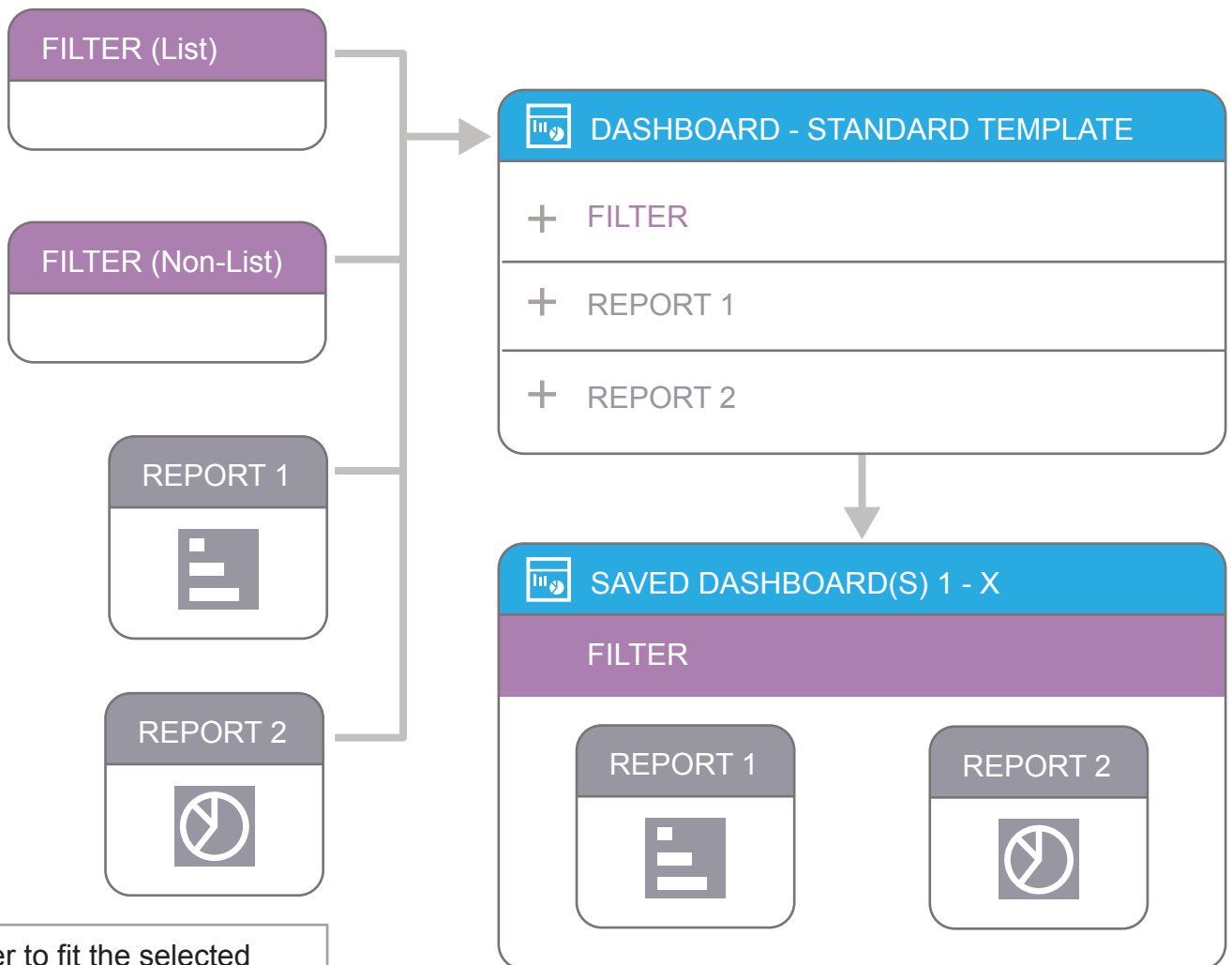
# STANDARD LAYOUT

## DASHBOARD EXPERIENCE

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

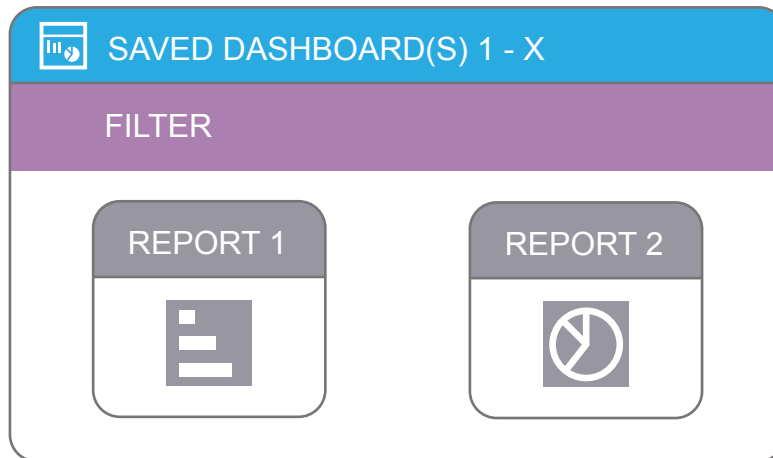
It displays multiple reports simultaneously but does not support COMPARISON FILTERS or "Repeat Reports".

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

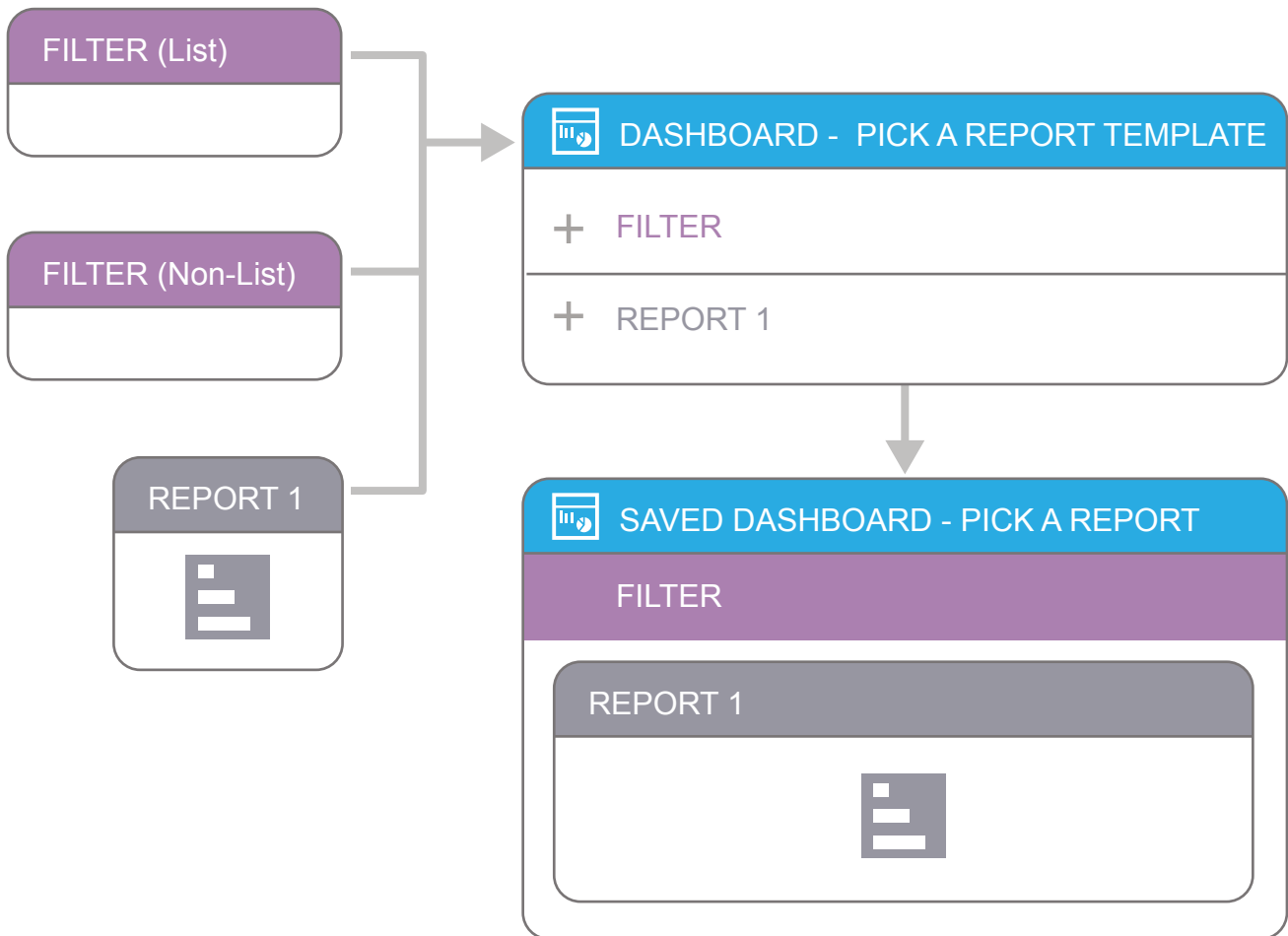
## DASHBOARD EXPERIENCE

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

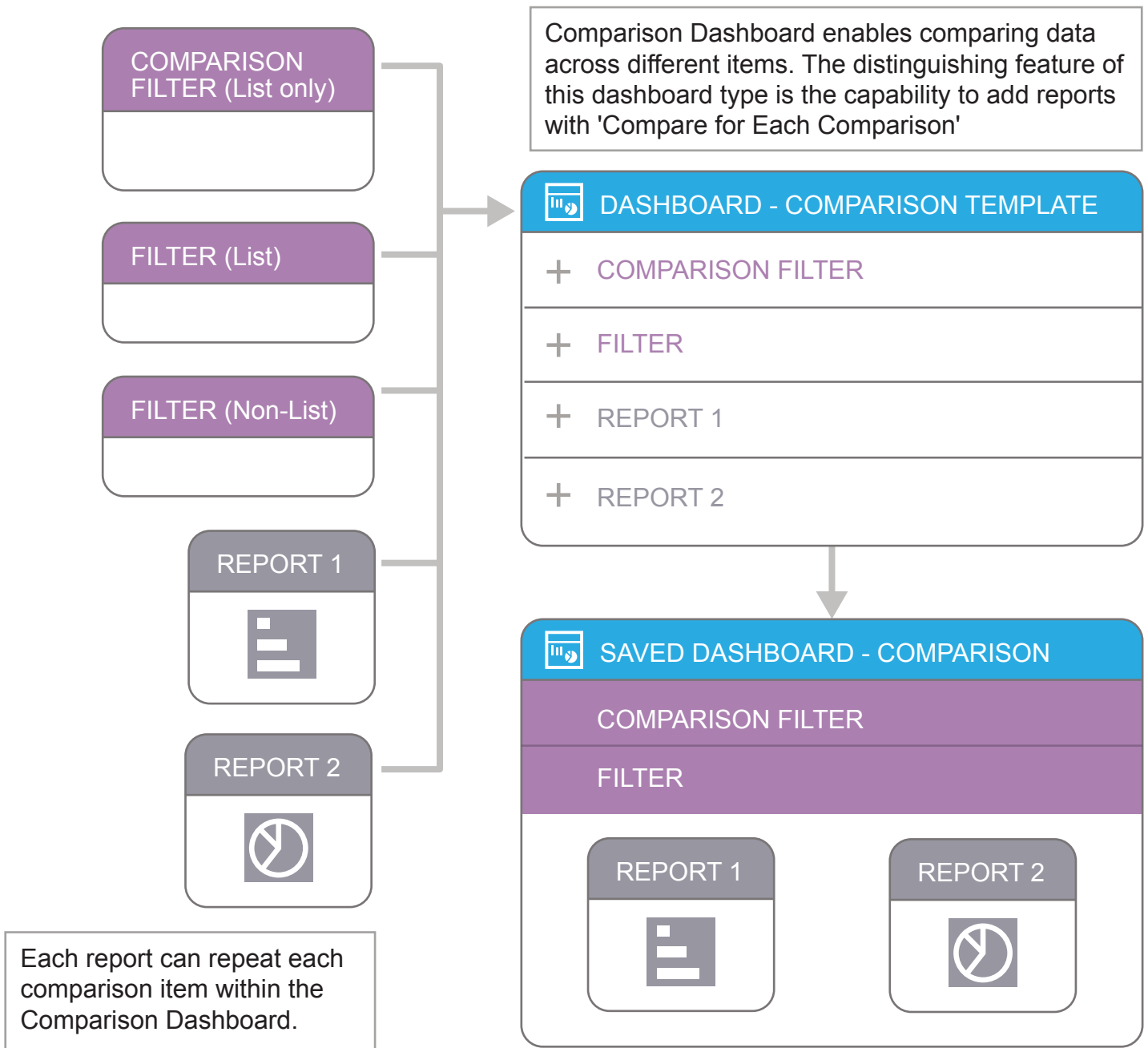
## DASHBOARD EXPERIENCE

Filter Types: Comparison and Non-Comparison

This dashboard types 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.

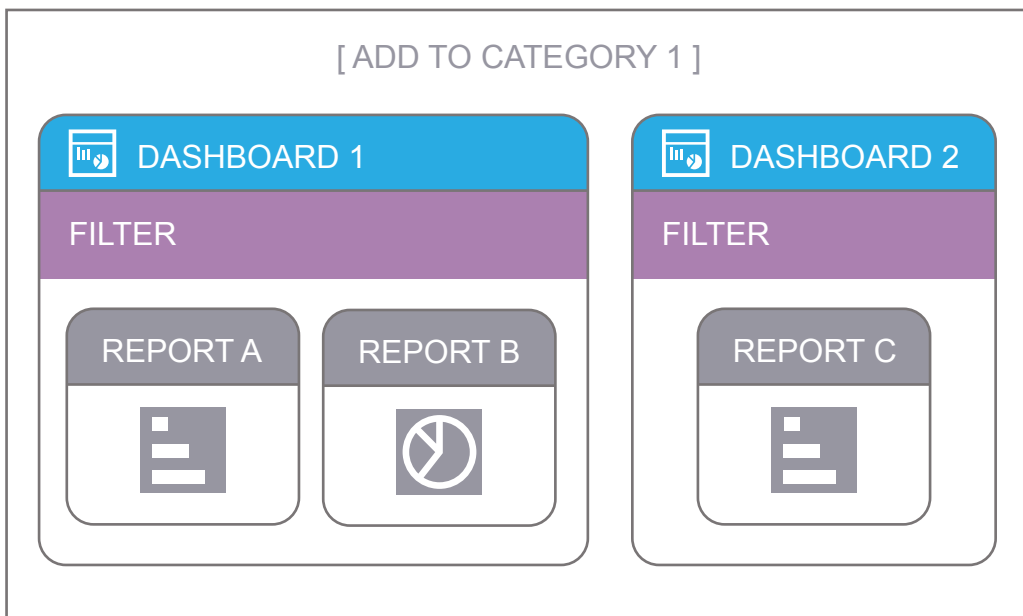
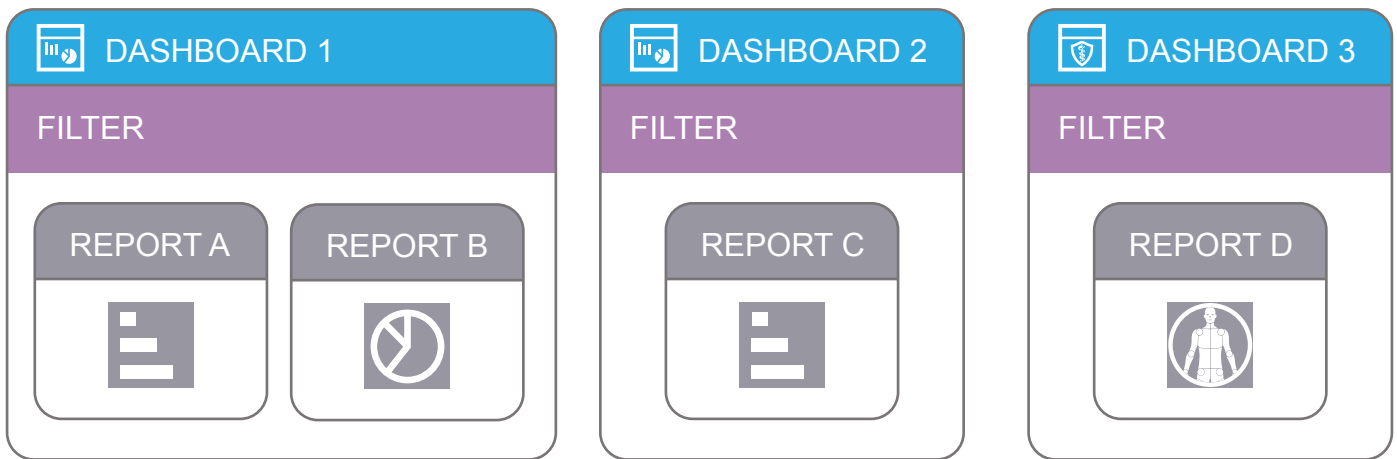


# DASHBOARD CATEGORIES

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.

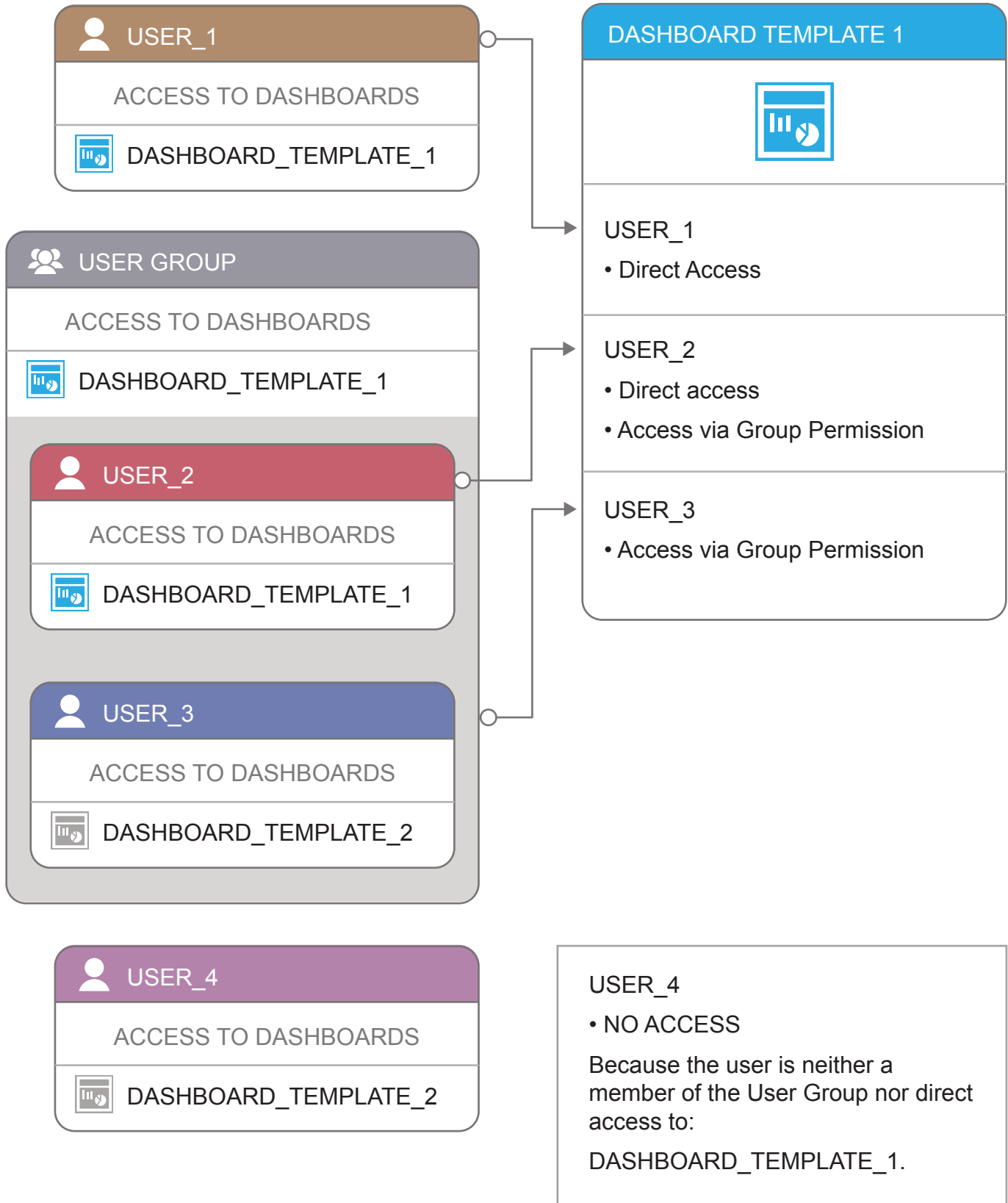
Dashboard Template categorization allows content separation between different users groups (e.g. marketing and sales departments)



**SECURITY**

# ACCESS TO DASHBOARDS

## SECURITY



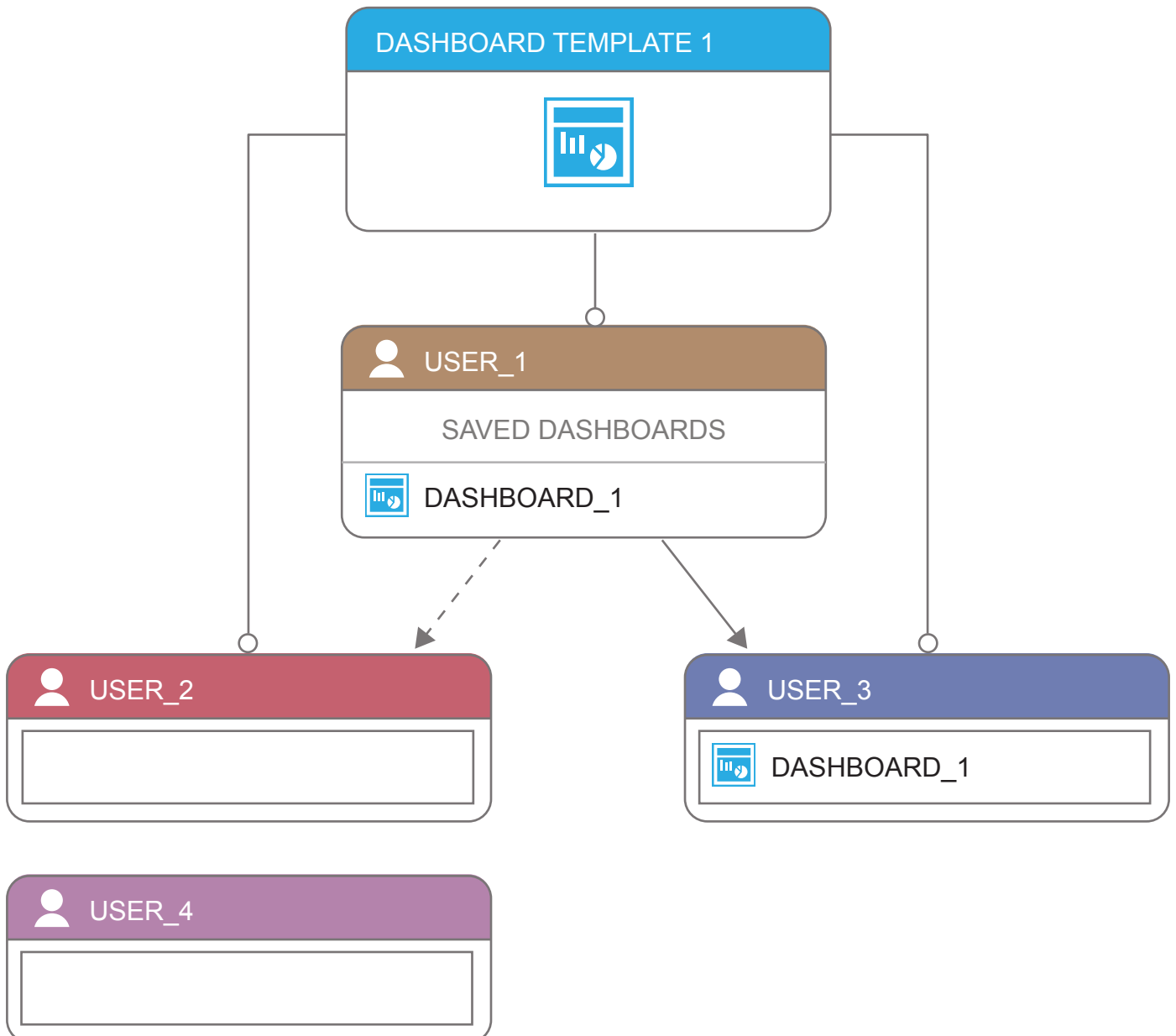


# ACCESS TO SAVED DASHBOARDS

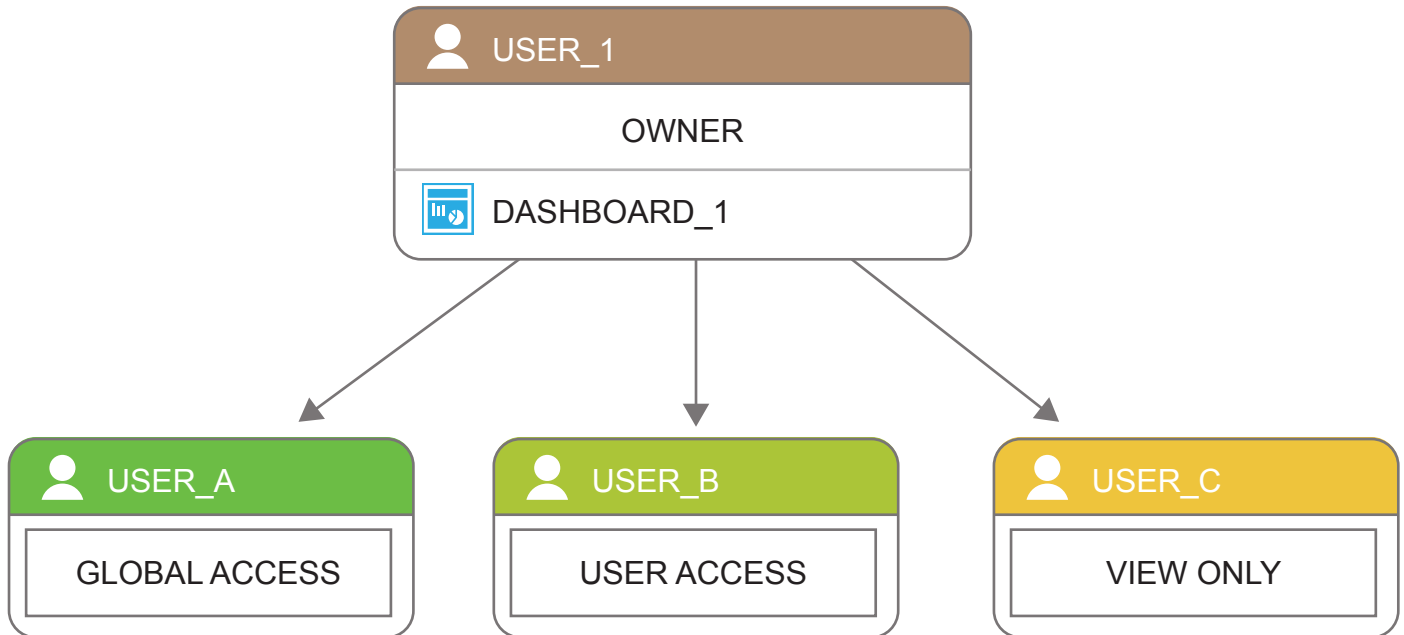
## SECURITY

It is possible for USER\_1 to share DASHBOARD\_1 with USERS 2 & 3 because they have access to DASHBOARD\_TEMPLATE\_1.  
It is not possible to share DASHBOARD\_1 with USER\_4 because they do not have access to DASHBOARD\_TEMPLATE\_1.

In order for a user to have access to any specific Dashboard saved by a User, the DASHBOARD owner must share the DASHBOARD with said user. USER\_3 has access to DASHBOARD\_1 because USER\_1 shared it with USER\_3. USER\_2 does not have access despite the fact that they both have access to DASHBOARD\_TEMPLATE\_1.



SAVED DASHBOARD can be shared by Owner to other Users with next permissions: Owner, Global Access, User Access, View Only



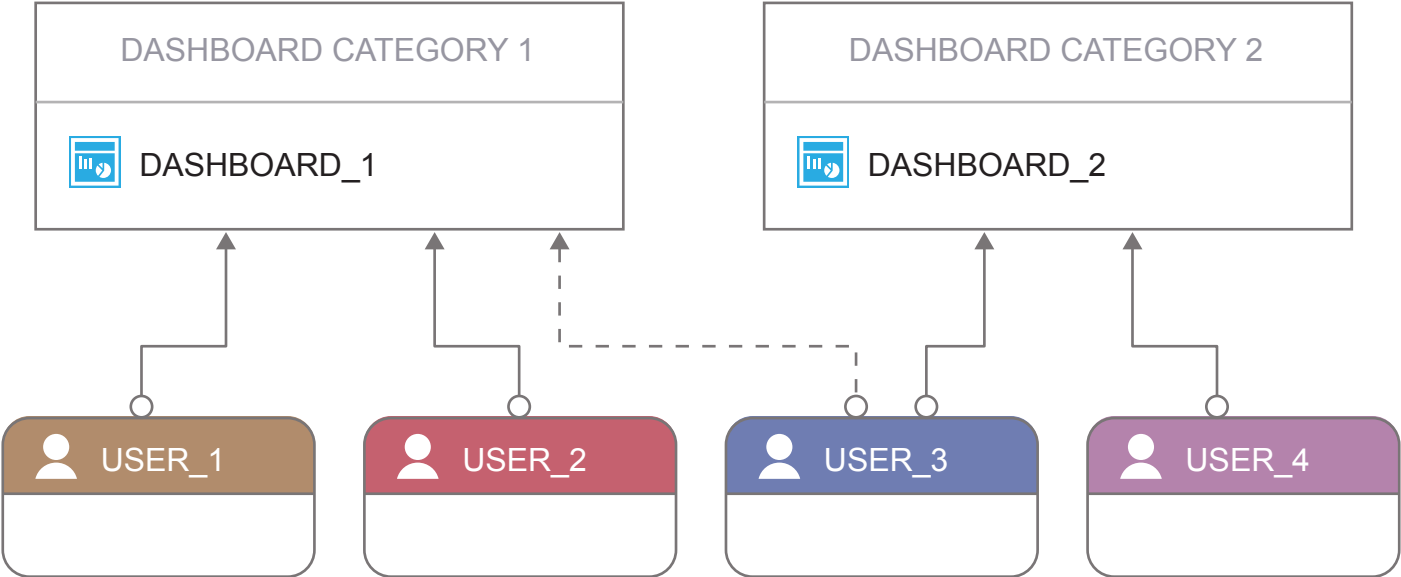
**OWNER:** Can share and change SAVED DASHBOARD (report or filter values) and re-save/update or save as a completely new dashboard. The Owner can delete an existing SAVED DASHBOARD.

**GLOBAL ACCESS:** Can share and change SAVED DASHBOARD (report or filter values) and re-save/update or save as a completely new dashboard. **Global Access cannot delete an existing SAVED DASHBOARD.**

**USER ACCESS:** can change an existing SAVED DASHBOARD (report or filter values) and re-save as a completely new dashboard. **User Access cannot update or delete an existing SAVED DASHBOARD.**

**VIEW ONLY:** can only see SAVED DASHBOARD but does have the ability to change report or filter values. **'View Only' cannot re-save, update, or delete SAVED DASHBOARD.**

USER has access to the DASHBOARD CATEGORY if they have access to at least one DASHBOARD included within said DASHBOARD CATEGORY.

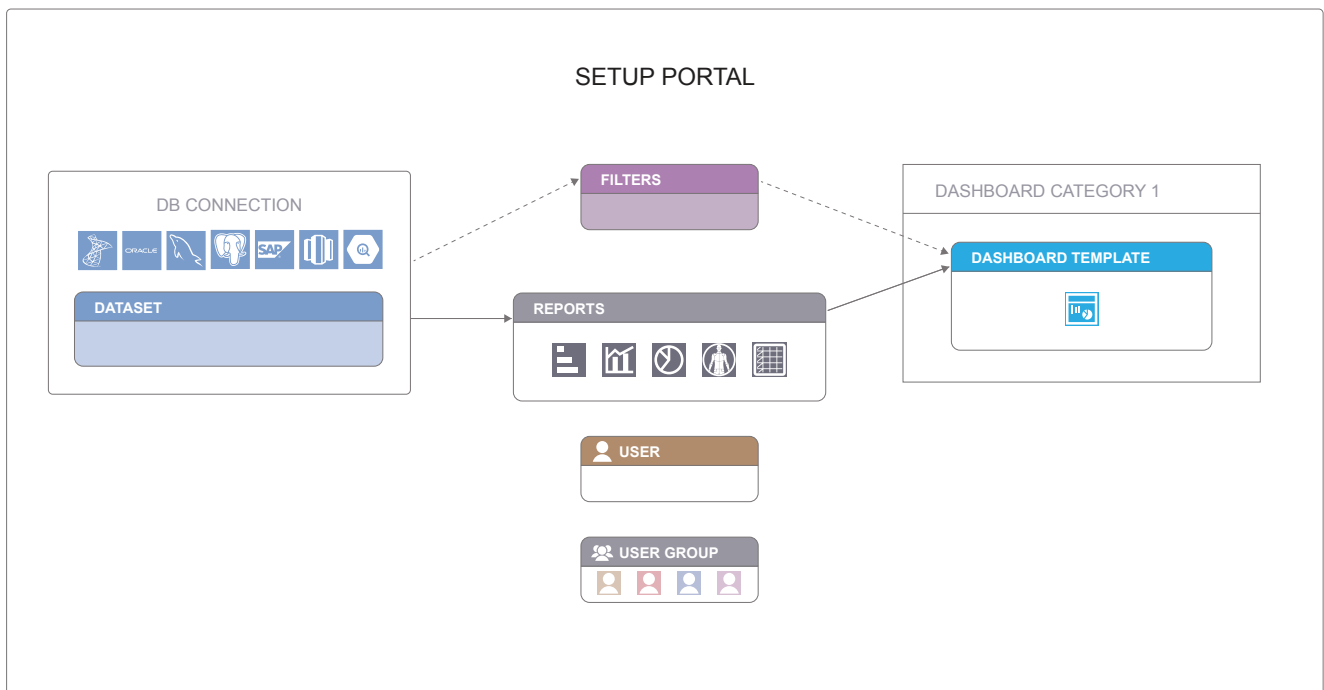


# SETUP PORTAL

# SETUP PORTAL

The Setup Portal is where the creation and configuration of Reports and Filters take place. It allows the developer to assign them to the appropriate Dashboard Template. In addition, the Setup Portal is where User creation and permission control is managed.

This division between the Setup Portal and Main Application makes the RockDaisy platform easy to use for the End User.

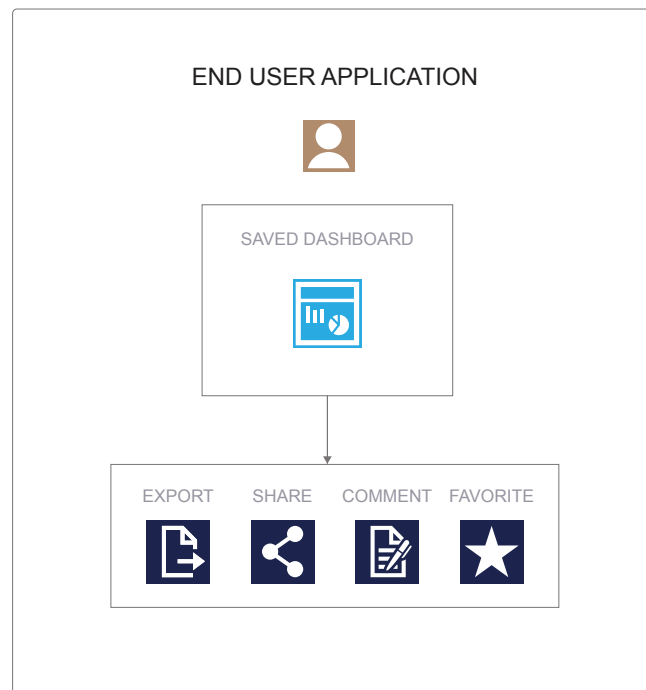


# END USER APPLICATION

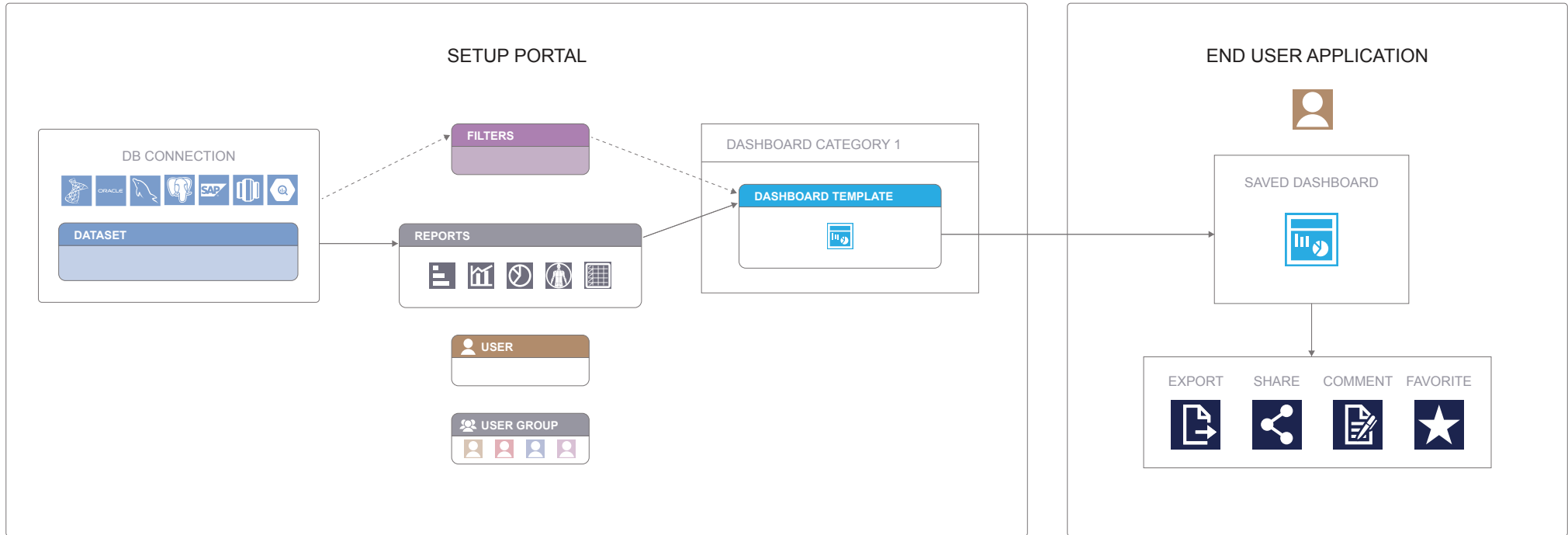
Dashboard Templates may be grouped into the Dashboard Categories, which organize access to the Dashboard Templates.

Dashboard Templates provide the ability to export the data.

Saved Dashboards allow sharing via in-app sharing feature or email, commenting and adding Saved Dashboard to Favorites.



# SETUP PORTAL / END USER APPLICATION FLOWCHART





# QUICK LINKS



The home page of the Setup Portal provides a QUICK LINKS section for shortcut navigation to new entity creation or to edit 'existing'; e.g. Reports, Filters, Datasets, etc.

EDIT      ADD

USERS		
-------	---	---



EDIT      ADD



USER GROUPS		
-------------	---	---

DB CONNECTIONS		
----------------	--	--

DATASETS		
----------	--	--

FILTERS		
---------	---	---

REPORTS		
---------	---	---

DASHBOARD TEMPLATES		
---------------------	---	---

ENTITY CATEGORIES		
-------------------	---	---




SETUP  
PORTAL  
DESIGN PREVIEW

# DESIGN PREVIEW

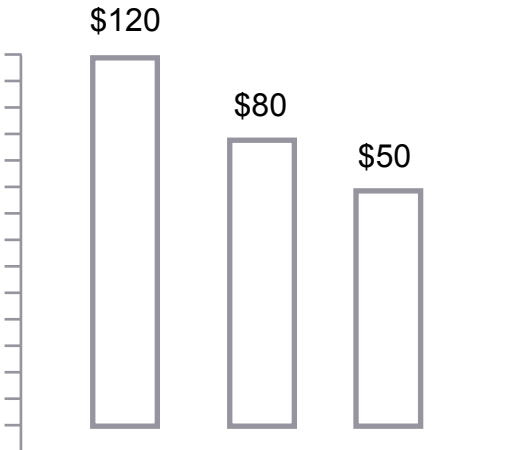
## SETUP PORTAL

When editing existing Reports, the Design Preview Tab will be open by default. This tab contains report options grouped in the following sections: Settings, Design, Plot Bands, Interactions, Layout and Advanced.

 REPORT

**SAVE** **DELETE** **COPY**

**PROPERTIES** **DESIGN PREVIEW** **PUBLISH SHORTCUT**



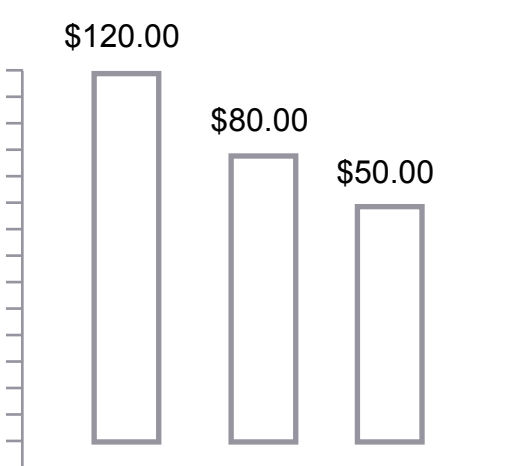
Value
\$120
\$80
\$50

- SETTINGS ▼
- DESIGN ▼
- PLOT BANDS ▼
- INTERACTIONS ▼
- LAYOUT ▼
- ADVANCED ▼

# SETTINGS

The Settings options controls the data format; e.g. allows developer to represent the data value as a currency.

PROPERTY DESIGN PREVIEW PUBLISH SHORTCUT



SETTINGS ▲

Format CURRENCY ▼

Decimal Places 2 ▲▼

Value
\$120.00
\$80.00
\$50.00

# DESIGN

Design options control the report data appearance; e.g. enable zoom ability for the report, show/hide report legend, change font size, etc.

Design options have a tree structure to make navigation easier.

PROPERTY DESIGN PREVIEW PUBLISH SHORTCUT



DESIGN ▲

Zoomable

Border

Width 2 px ▲▼

Color   ▼

Label

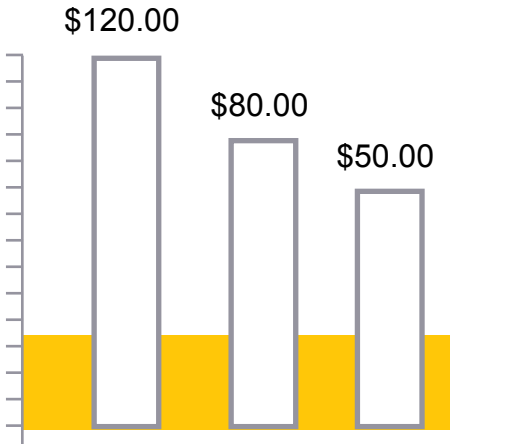
Font 16px Arial, sans-serif

Value
\$120
\$80
\$50

# PLOT BANDS

Plot Bands settings control colored ranges, the purpose of which is to highlight areas of the chart by changing its background in a predefined axis range.

PROPERTY DESIGN PREVIEW PUBLISH SHORTCUT




A bar chart with three bars. The first bar is labeled \$120.00, the second \$80.00, and the third \$50.00. The chart has a vertical axis with tick marks. The area under the bars is highlighted with a yellow color, representing the plot bands. The plot bands are defined by the 'From' and 'To' settings in the adjacent panel.

Bar	Value
1	\$120.00
2	\$80.00
3	\$50.00

PLOT BANDS ▲

From 0 ▲▼

To 20 ▲▼

Color  ▼

# INTERACTIONS

## CHARTS (INTERACTIONS)

Chart 'Interactions' enable passing a report value through to a different report/dashboard template.

Two Interaction Types are supported in Charts:

- DRILLDOWN
- JUMP TO DASHBOARD

## DRILLDOWN

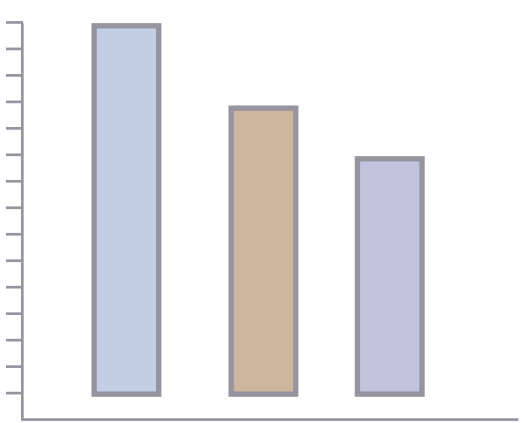
'Drilldown' enables popping up a separate report from within the same dashboard and therein is not required to be added to the dashboard template of its parent report. Setting up this type of interaction requires the following steps:

- 'Drilldown to Report' Choose which report will pop open
- 'Filter Variable' Any existing Filter Variable
- 'Filter Variable Identifier' Any field from the parent Report dataset



REPORT 1

PROPERTIES DESIGN PREVIEW PUBLISH SHORTCUT



INTERACTIONS ▲

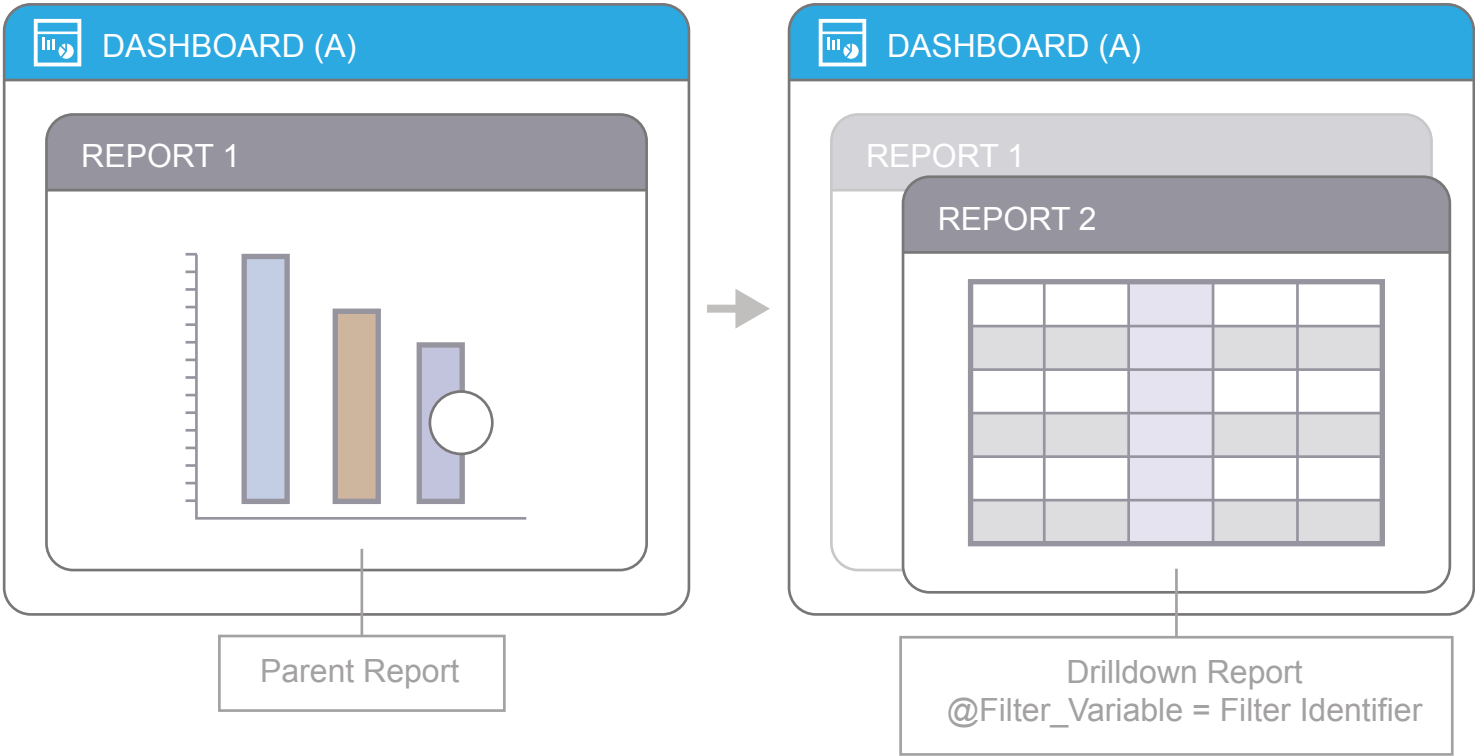
Interaction Type

Filter Variable

Filter Identifier

Drilldown Report

In the main application Drilldown report would be opened by clicking on the Parent report. The Filter Variable value, defined in the parent report, will be passed to the Drilldown.



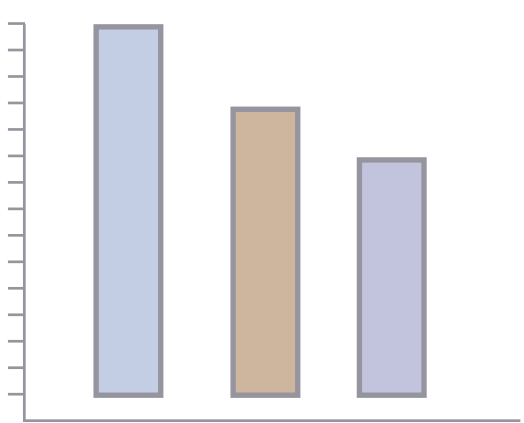
## JUMP TO DASHBOARD

'Jump to Dashboard' provides navigation to another dashboard template/saved view, set up includes the following:

- 'Dashboard Template Filter Variable' Any existing Filter Variable
- 'Dashboard Template Filter Identifier' Any field from parent Report dataset
- 'Jump to Dashboard Template' Any Dashboard Template to jump to

REPORT 1

PROPERTIES DESIGN PREVIEW PUBLISH SHORTCUT



INTERACTIONS

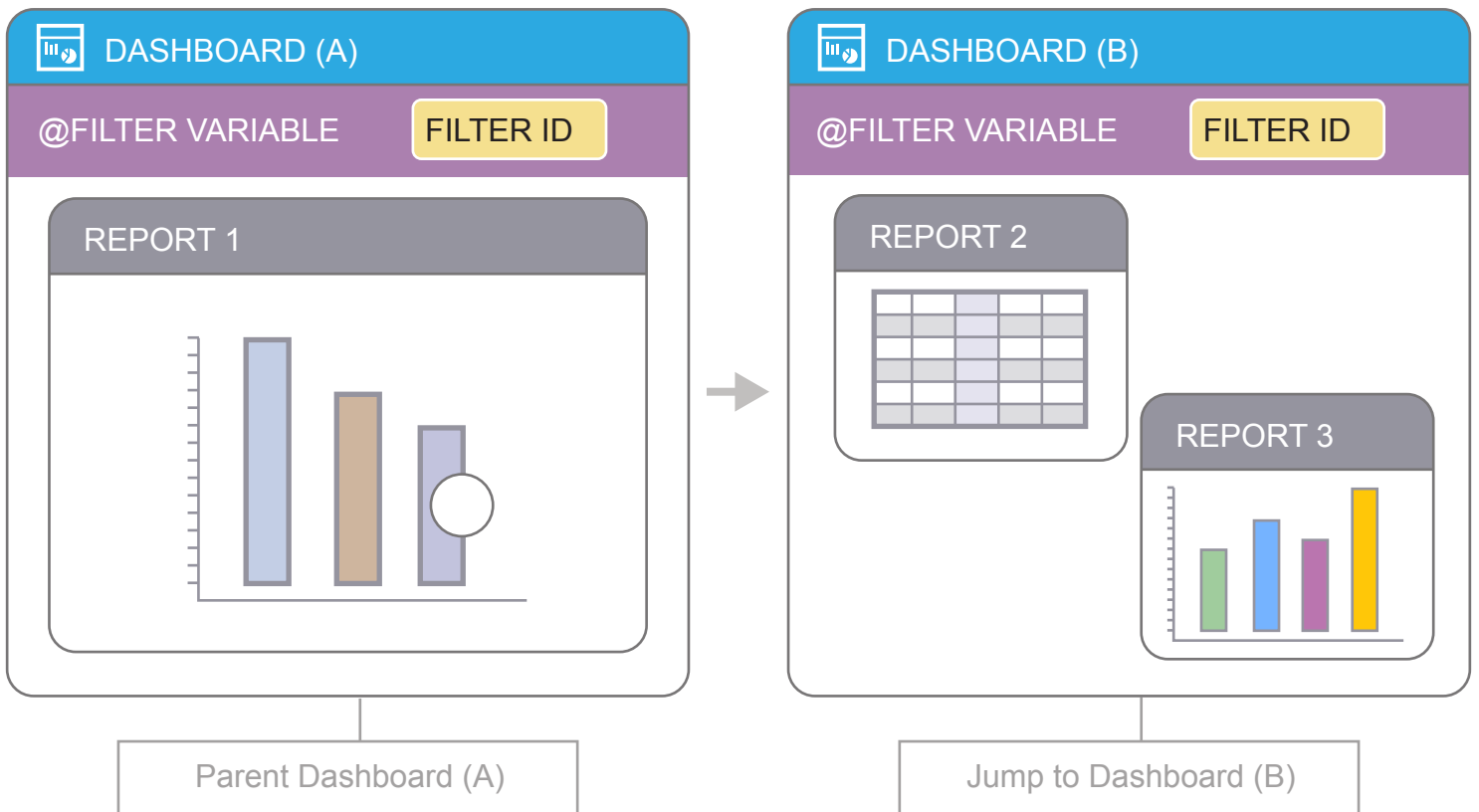
Interaction Type

Filter Variable

Filter Identifier

Jump to Dashboard

In the main application Jump to Dashboard would be open by clicking on the Parent report. Filter Variable value, defined in the Parent report, will be passed to the Jump to Dashboard.



## TABLES (INTERACTIONS)

The Table report type supports several Interaction options:

### DRILLDOWN

*Cell Drilldown, Multi-Cell Drilldown, Row Drilldown, Multi-Row, Drilldown, Row Expand Drilldown*

Cell Drilldown: Pass different values from different table columns; the Filter Variable Identifier must be set per column. Row Drilldown has the same settings as a Common Chart.

### FILTER CONTROL

*Single Cell Filter Control, Multi-Cell Filter Control, Row Filter Control*

Filter Control: Control other reports added to the same dashboard as the parent report. Clicking on a cell in the parent table enables additional Filter Variable to pass through to all other reports in the same dashboard. For Cell Filter Control the Filter Variable Identifier must be set on a per column basis.

### JUMP TO DASHBOARD

*Single Row Jump to Dashboard and Multi-Row Jump to Dashboard*

Multi-Row Jump to Dashboard: Select multiple rows in the table in order to pass multiple values into the Filter Variable.



REPORT 1

PROPERTIES

DESIGN PREVIEW

PUBLISH SHORTCUT


#### INTERACTIONS

Interaction Type

Filter Control 

Filter Variable

@Filter\_Variable 

Filter Identifier

Id 



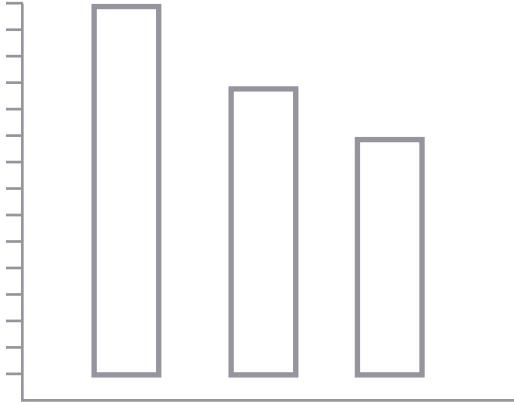
In the main application Parent report allows to control another report added to the same dashboard by passing defined Filter Variable value.



# LAYOUT

Layout options control the default report size, ability to toggle to other reports, etc. Toggle to other reports feature provides an ability to switch between different reports inside the report window.

PROPERTY DESIGN PREVIEW PUBLISH SHORTCUT



LAYOUT

Default Width 8

Default Height 8

Disable Title Bar Area

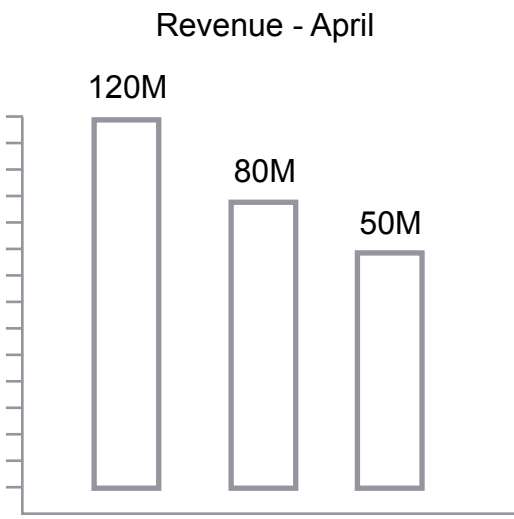
Enable Toggle to Other Reports

Reports Selections +

# ADVANCED

Advanced options control dynamic titles, custom metric display, tooltip display settings, etc.

PROPERTY DESIGN PREVIEW PUBLISH SHORTCUT



ADVANCED

Dynamic Title Month

Custom Metric Metric 2

Tooltip Display Standard

# REPORT SPECIFIC OPTIONS

All visualization types, different from charts have their own specific options.

## TABLE

Table Design options control table-specific settings, such as an ability to sort and filter the data, reorder columns, etc.

PROPERTIES DESIGN PREVIEW PUBLISH SHORTCUT


### DESIGN

- Sortable
- Filterable
- Reorderable

PDF Export

File Name

Each Table report column has its own Design options, which control column-specific settings, such as column Data Type, Data Alignment, Custom CSS styles, etc.

PROPERTIES DESIGN PREVIEW PUBLISH SHORTCUT


### COLUMN DESIGN

Column Type

Column Data Style


Alignment

Column CSS

# KPI CARD

KPI Card and some other report types have Sub Item section

PROPERTY DESIGN PREVIEW PUBLISH SHORTCUT



Sub Item 1


Sub Item 2

SUB ITEMS ▲

- ☰ ✎ 🗑 Sub Item 1
- ☰ ✎ 🗑 Sub Item 2

Each Sub Item has its own menu with specific settings.

PROPERTY DESIGN PREVIEW PUBLISH SHORTCUT



Sub Item 1

Sub Item 2

PROPERTY ▲

Data Format Currency ▼

Label Currency ▼

INTERACTIONS ▲

Interaction Type Drilldown ▼

Filter Variable @Filter\_Variable ▼

Filter Identifier Id ▼

Drilldown Report Report 2



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New York, NY 10016  
[info@rockdaisy.com](mailto:info@rockdaisy.com)