

**Version**

**1.0**

IZENDA REPORTS

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Self-Service Reporting for ASP.NET Application

# Izenda Reports Dashboard Guide

IZENDA REPORTS LLC

# Dashboard Guide

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# Table of Contents

Keys to Creating a Successful Dashboard .....	1
Dashboard Elements.....	2
Steps to create a Dashboard SubReport.....	8
Creating a Dashboard .....	10

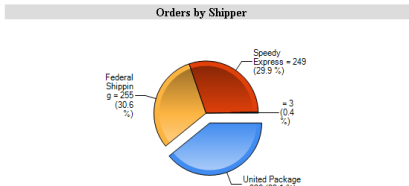
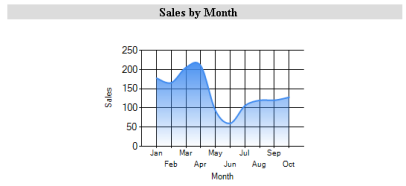
# Keys to Creating a Successful Dashboard

This section will show the dashboard capabilities and functionality. Below is an example of a dashboard with a pivot report at the top, gauges and pie chart. Within the design of the dashboard you can choose which element of your report that you want to appear in the dashboard (such as chart, fields, gauge and summary)

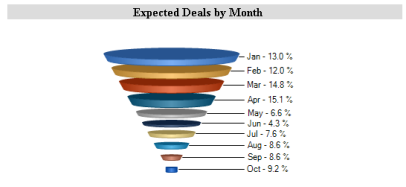


Back | Report List | Design

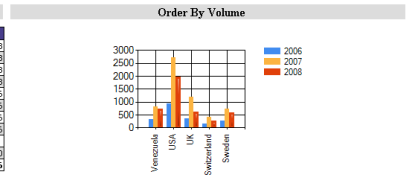
USA						
Ship City	Total	2006	2007	2008		
Albuquerque	\$4,268.42	\$1,219.94	\$1,714.54	\$1,233.94		
Anchorage	\$1,967.06	\$683.66	\$481.00	\$802.40		
Boise	\$13,367.40	\$859.98	\$6,227.00	\$6,280.42		
Butte	\$259.92	\$0.00	\$230.10	\$29.82		
Elgin	\$114.16	\$100.83	\$13.24	\$0.00		
Eugene	\$2,175.22	\$0.00	\$552.22	\$1,623.00		
Kirkland	\$140.02	\$0.00	\$126.02	\$14.00		
Lander	\$1,117.94	\$62.96	\$155.10	\$99.28		
Portland	\$683.90	\$61.94	\$395.60	\$36.75		
San Francisco	\$404.22	\$0.00	\$222.28	\$181.94		
Seattle	\$2,706.12	\$55.70	\$992.84	\$1,657.58		
Walla Walla	\$38.80	\$0.00	\$38.80	\$0.00		
	\$27,342.58	\$3,944.70	\$11,638.74	\$11,959.14		



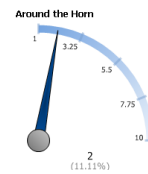
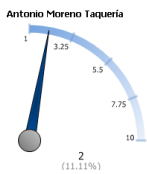
Top Employees		
First Name	Last Name	Count(Order ID)
Michael	Suzana	265
Margaret	Peacock	624
Janet	Leaveling	508
Andrew	Fuller	384
Nancy	Dawilo	498
Laura	Callahan	416
Anne	Dodsworth	172
Beverly	Buchanan	168
Robert	King	288
		<b>3,326</b>



Top Countries		
Ship Country	Sum(Freight)	
Finland	\$1,821.79	
Brazil	\$9,760.38	
USA	\$27,942.59	
Italy	\$1,728.88	
Germany	\$2,566.56	
Mexico	\$2,245.56	
Argentina	\$1,197.16	
Switzerland	\$2,737.06	
Sweden	\$6,475.20	
	<b>\$76,075.16</b>	



Gauge

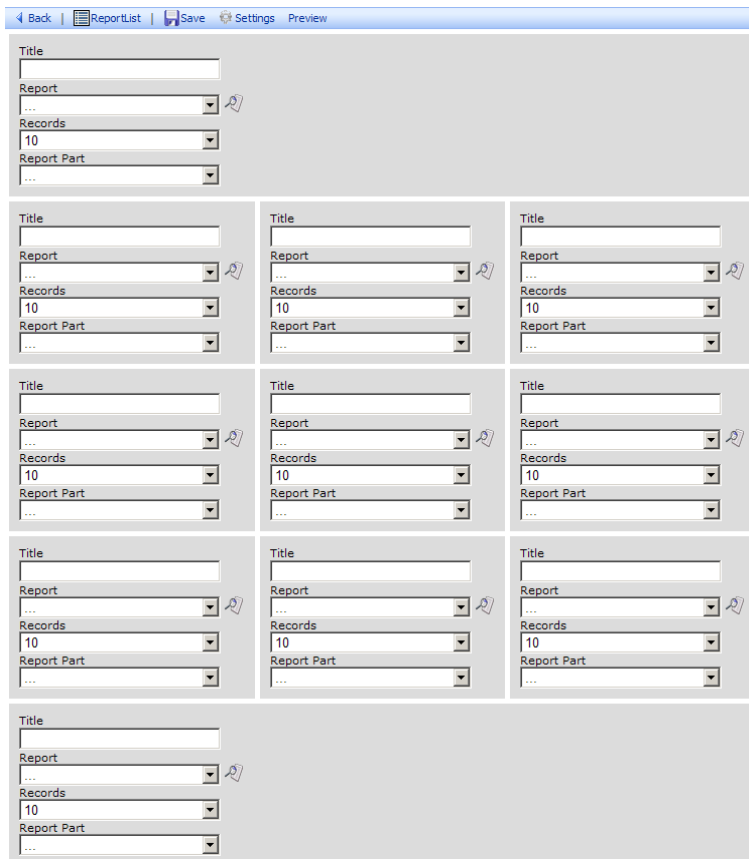


## Dashboard Elements

There are four main elements for each section of the Dashboard:

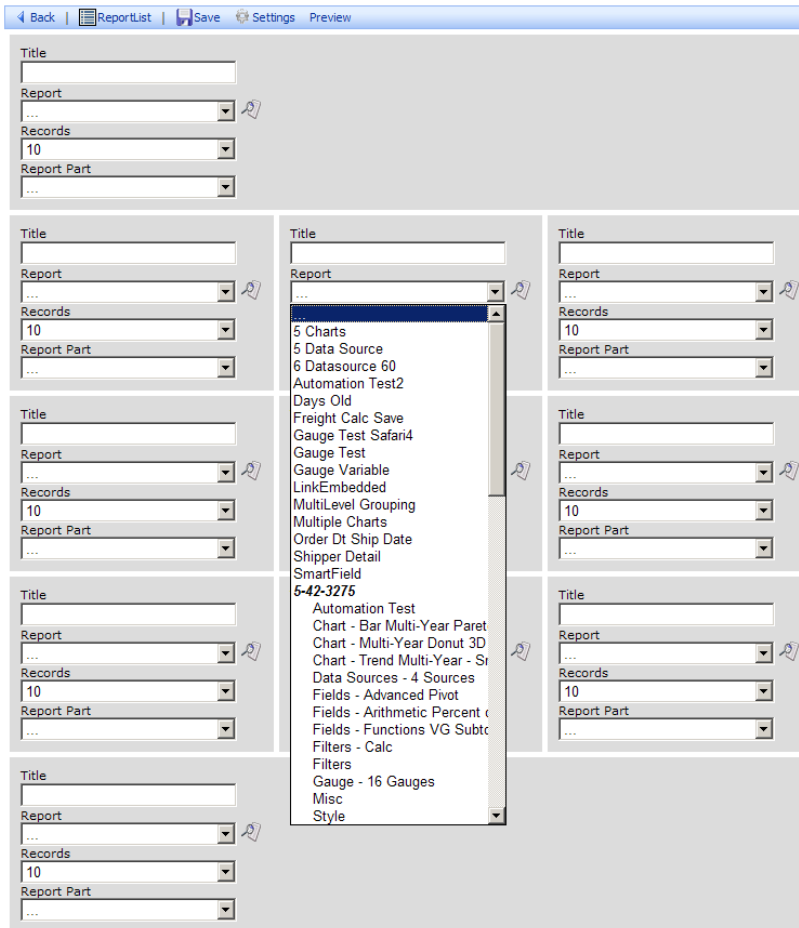
1. Title – Title for the section of the dashboard.
2. Report – this is used to select the report in which you want included in the Dashboard.
3. Records – Sets the number of records you want to display in the dashboard, such as 10.
4. Report Part – this is used to select which element of your report that you wish to show on the dashboard (such as – Fields, Summary, Chart or Gauges)

Figure 1: This is the basic Dashboard Designer. There are a total of 11 fields that can be currently set in the designer. 2 large (used for pivots and larger columns) and 9 small (used for gauges, charts, smaller field reports).



## DASHBOARD CUSTOMIZATION

Figure 2: Report – This drop down is used to select the report in which you would like included within the Dashboard. You can use any report that is in you ReportList that you have authorization to see. The icon next to the Report dropdown is used to open the selected report in a separate window.



## DASHBOARD CUSTOMIZATION

Figure 3: Records – this will allow the user to select how many records to be displayed in the dashboard for the report. It is set in increments of 5, you do have the option if All and All(No Scroll Bar) also, however these option may make the dashboard non-functional due to the amount of records in your report.

The screenshot displays a dashboard customization interface with a navigation bar at the top containing 'Back', 'ReportList', 'Save', 'Settings', and 'Preview'. The main area is a grid of report widgets. Each widget has a 'Title' field, a 'Report' dropdown, a 'Records' dropdown, and a 'Report Part' dropdown. The central widget's 'Records' dropdown is open, showing a list of options: 'All (No Scroll Bar)', 'All', '5', '10' (highlighted), '15', '20', '25', '30', '35', '40', '45', '50', '55', '60', '65', '70', '75', '80', '85', '90', '95', and '100'. The '10' option is currently selected in the widget's dropdown menu.

## DASHBOARD CUSTOMIZATION

Figure 4: Report Part – this allows the user to determine which element of their report they wish to show on the dash board. If you have a report that has multiple charts or pivots, you can add the report into the dashboard several times and then select each element separately on the dashboard. One can show the pivot and another show the chart or trend.

The image displays a grid of configuration panels for report parts on a dashboard. Each panel includes the following fields:

- Title:** A text input field.
- Report:** A dropdown menu with a help icon.
- Records:** A dropdown menu with the value '10' selected.
- Report Part:** A dropdown menu.

The central panel in the grid has its 'Report Part' dropdown menu open, showing the following options:

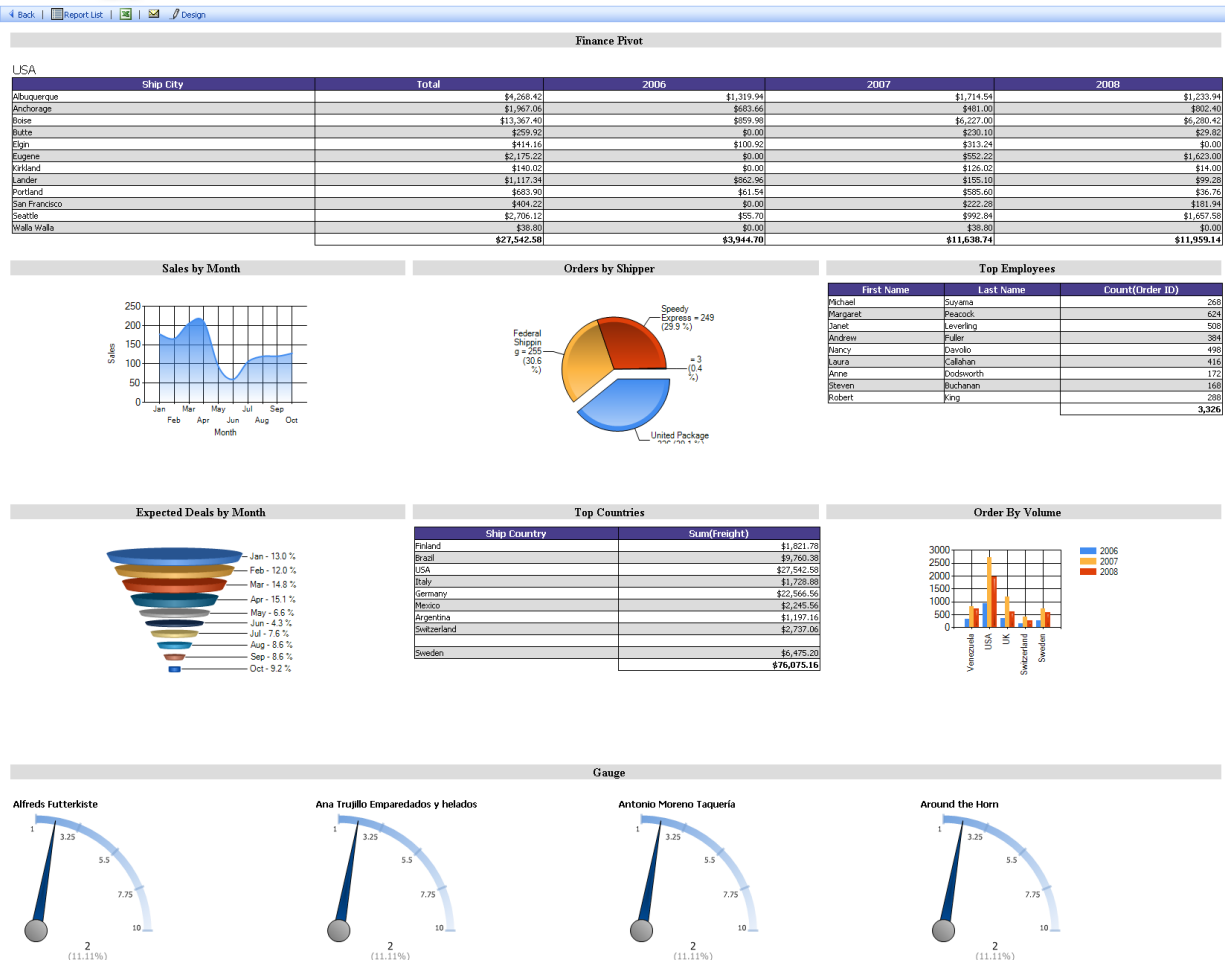
- Fields
- Summary
- Chart
- Gauge

The interface is designed to allow users to customize which report elements are displayed on their dashboard.

## DASHBOARD CUSTOMIZATION

Figure 5: This is an example of a section of the dashboard with various style of reports being displayed, such as:

1. Pivot
2. Smoothed trend
3. Pie Chart
4. Simple Grid
5. Funnel Chart
6. Summary
7. Bar Chart
8. Gauges



DASHBOARD CUSTOMIZATION

Figure 6: This example shows a pivot table using the Cell Highlight and Subreport functionality. By clicking on one of the links in the dashboard grid will open the supreport. If you were to select Anchorage from the link it would open the report as pass the parameter of Anchorage and show that subreport

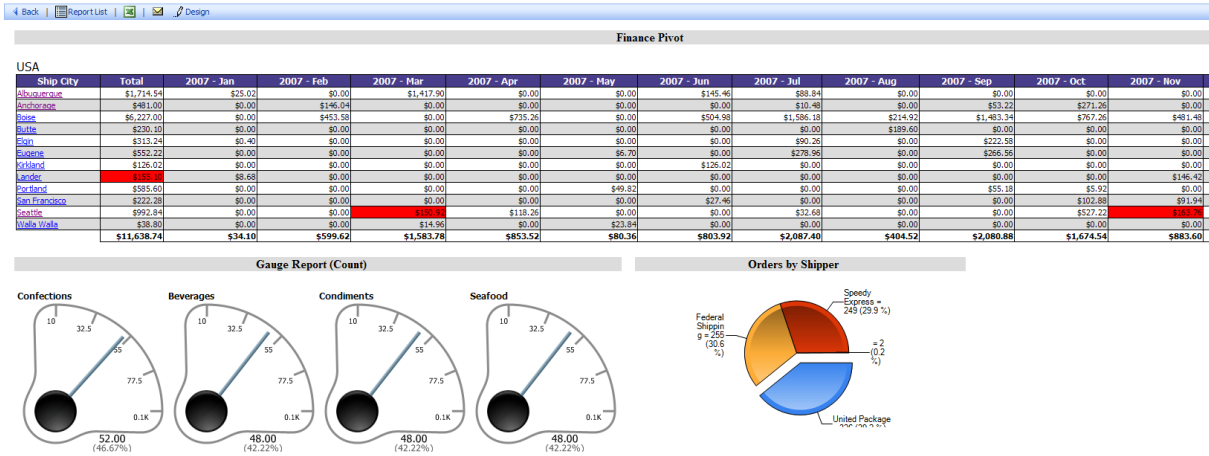
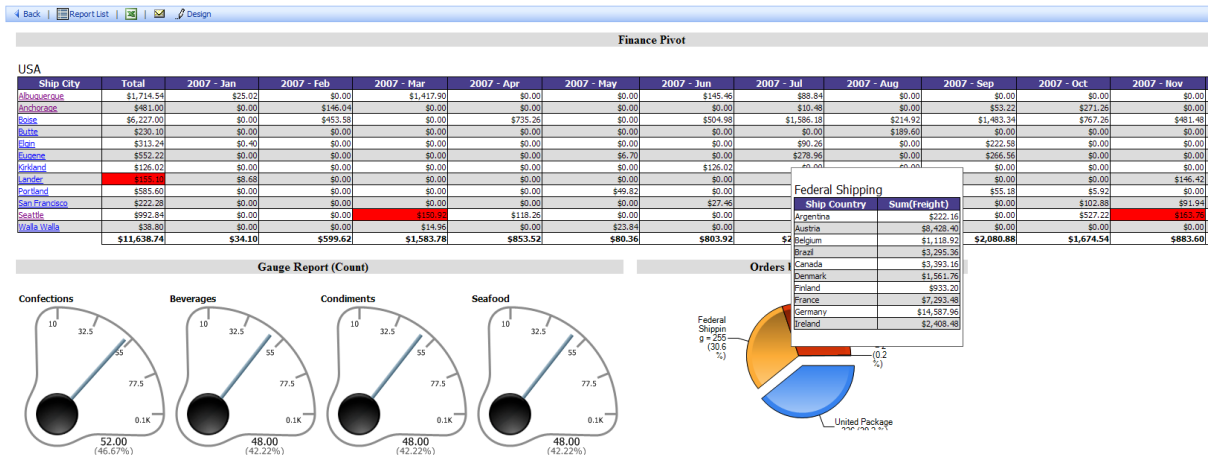


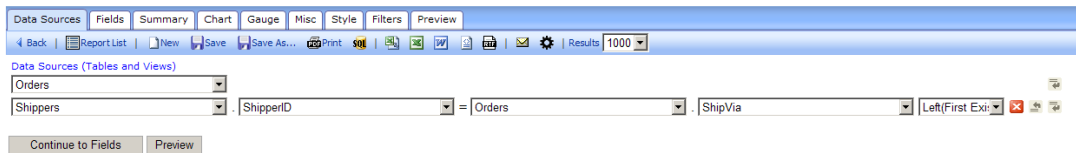
Figure 7: This is an example of a chart in the dashboard that has hover capabilities on the various sections of the pie chart.



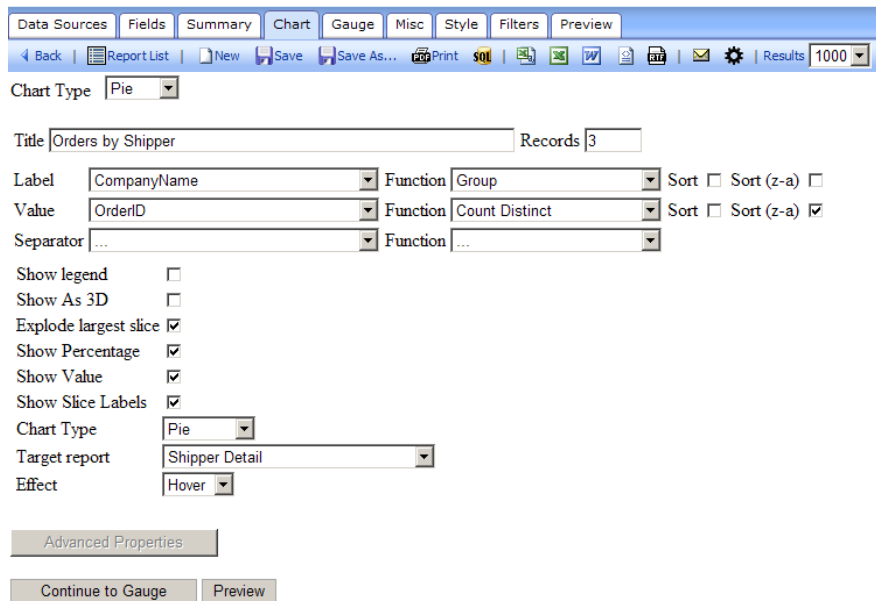
## Steps to create a Dashboard Sub-Report

1. Create the subreport – in this example we will create a pie chart with hover functions.

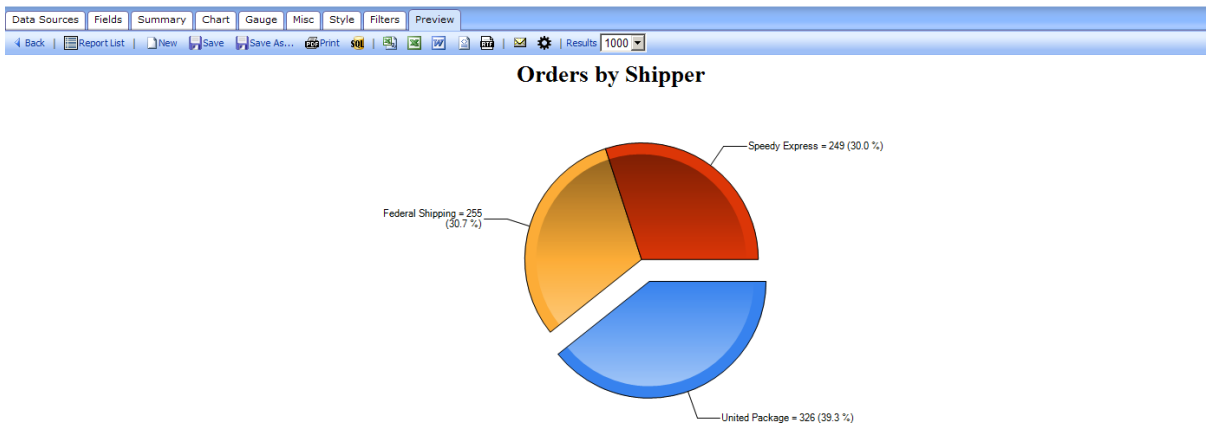
Step 1: Select your datasources



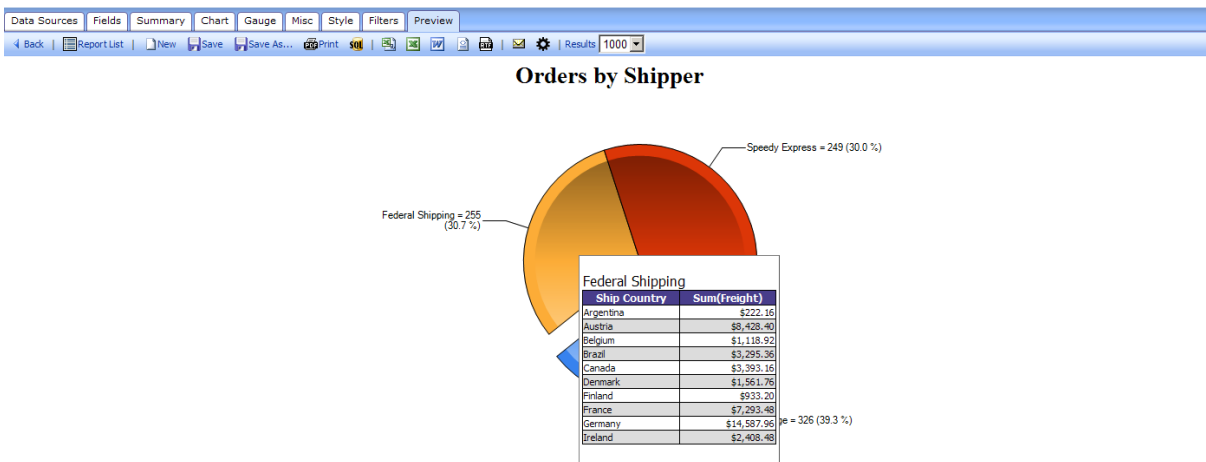
Step 2: Go to the chart tab and select “Pie” from the chart type field, Insert a Title for your chart in the Title field. Select your lable and value for the chart. IN this example we used CompanyName as the label and OrderID as the value. Click on the Advanced Properties button, in the advanced properties select the chart type of “Pie”. The target report will be the report that will present the data when you hover over the sections of the pie chart. Once you have determined your target report, then select the effect you want. In this case “Hover” and then save the report.



This is what the report will look like once completed.



To see the hover report, all you have to do is place your mouse over one of the sections of the pie chart. This will be the results you will see.



## Creating a Dashboard

Step 1 – Create your sub reports. In the Dashboard there is room for 11 different parts of various reports. The top and bottom section are used for larger reports, such as pivots and multiple gauges. The other 9 sections are used for Charts and smaller grid reports.

Step 2 – open the dashboard by going to your ReportList and clicking on the link “design a new dashboard”.

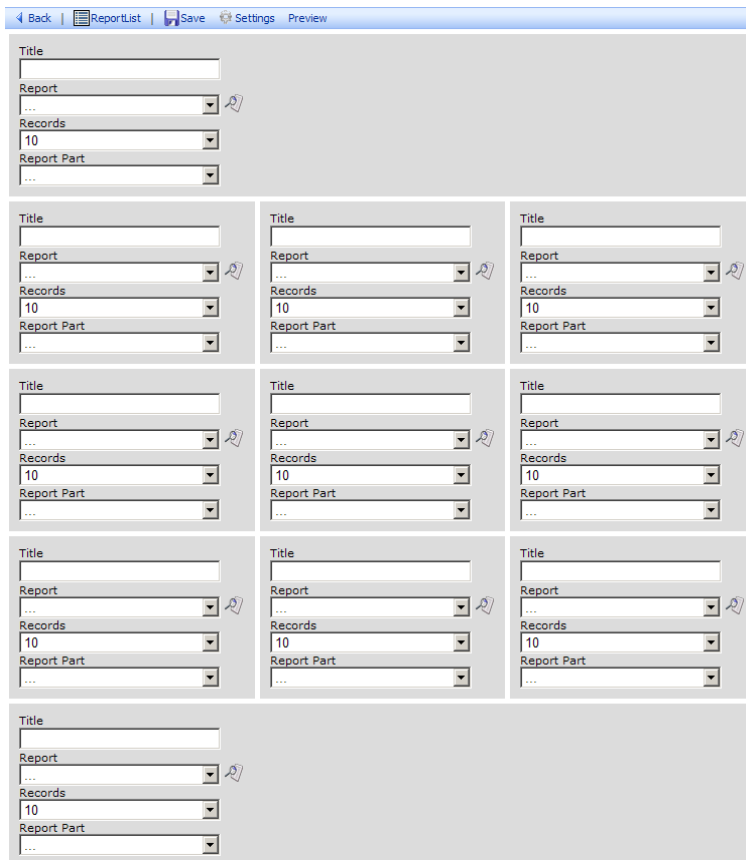


[Design a New Report](#)

[Design A New Dashboard](#)

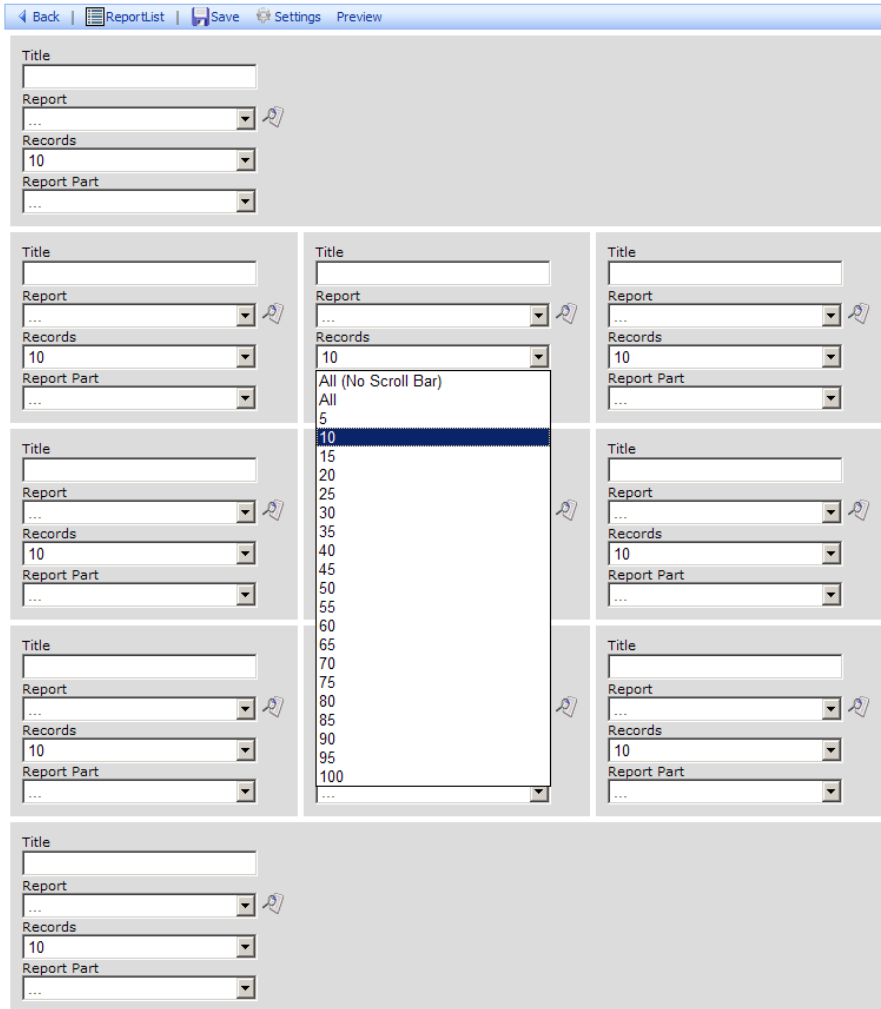
### Uncategorized Reports

Step 3 – Once the Dashboard designer is open , you can chose what grid or section of the dashboard that you would like to palce your report. In this example we will use the center grid of the smaller sections.





Step 3B – Select the records. This will be the number of rows of data that you want displayed in your dashboard.



Step 3C – Select report part. This will be the section of the report that you want displayed in the dashboard. Such as: Fields, Summary, Chart or Gauge.

The image displays a grid of dashboard configuration widgets. Each widget contains the following fields:

- Title: A text input field.
- Report: A dropdown menu with a help icon.
- Records: A dropdown menu with the value '10' selected.
- Report Part: A dropdown menu.

The central widget in the grid has its 'Report Part' dropdown menu open, showing the following options:

- Fields
- Summary
- Chart
- Gauge

Step 4 – Finish completing the various sections of the dashboard with your reports.

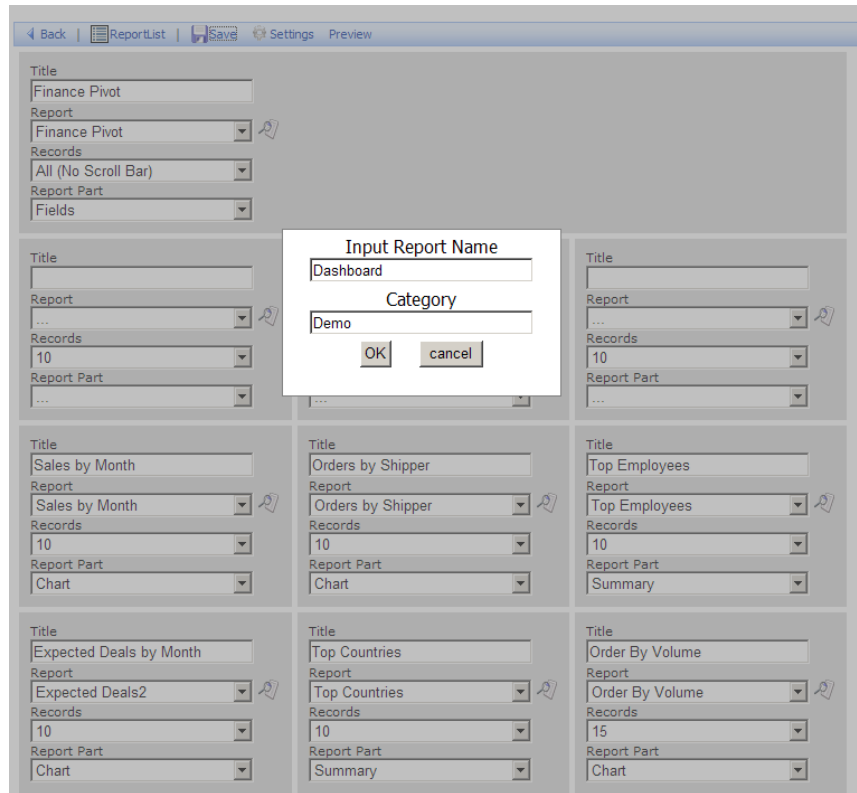
The screenshot displays a web-based report configuration interface. At the top, there is a navigation bar with the following items: a back arrow, 'ReportList', a save icon, 'Settings', and 'Preview'. Below this, the interface is organized into a grid of report configuration panels. Each panel contains the following fields:

- Title:** A text input field.
- Report:** A dropdown menu with a help icon.
- Records:** A dropdown menu.
- Report Part:** A dropdown menu.

The panels are arranged as follows:

- Top Left:** Title: Finance Pivot; Report: Finance Pivot; Records: All (No Scroll Bar); Report Part: Fields.
- Row 2 (3 panels):** All three panels have empty Title fields, '...' in the Report dropdown, '10' in the Records dropdown, and '...' in the Report Part dropdown.
- Row 3 (3 panels):**
  - Panel 1:** Title: Sales by Month; Report: Sales by Month; Records: 10; Report Part: Chart.
  - Panel 2:** Title: Orders by Shipper; Report: Orders by Shipper; Records: 10; Report Part: Chart.
  - Panel 3:** Title: Top Employees; Report: Top Employees; Records: 10; Report Part: Summary.
- Row 4 (3 panels):**
  - Panel 1:** Title: Expected Deals by Month; Report: Expected Deals2; Records: 10; Report Part: Chart.
  - Panel 2:** Title: Top Countries; Report: Top Countries; Records: 10; Report Part: Summary.
  - Panel 3:** Title: Order By Volume; Report: Order By Volume; Records: 15; Report Part: Chart.

Step 5 – The last step is to save your dashboard by clicking on the save button in the navigation bar. This will open a dialog box where you can name your dashboard and category where you wish to save it to.



Step 6 – Finished Dashboard - Once you have enter report parts in your various sections, it is easy to create a dashboard like the one shown below with little effort and in only a few moments.



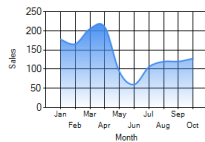
Back | Report List | Design

Finance Pivot

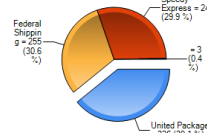
USA

Ship City	Total	2006	2007	2008
Albuquerque	\$4,268.42	\$1,319.94	\$1,714.54	\$1,233.94
Anchorage	\$1,967.06	\$653.66	\$461.00	\$852.40
Boise	\$13,367.40	\$859.98	\$6,227.00	\$6,280.42
Butte	\$259.92	\$0.00	\$230.10	\$29.82
Elgin	\$414.16	\$100.92	\$313.24	\$0.00
Eugene	\$2,175.22	\$0.00	\$552.22	\$1,623.00
Kirkland	\$140.02	\$0.00	\$126.02	\$14.00
Lander	\$1,117.34	\$862.96	\$155.10	\$99.28
Portland	\$683.90	\$61.54	\$585.60	\$36.76
San Francisco	\$494.22	\$0.00	\$222.28	\$119.94
Seattle	\$2,706.12	\$55.70	\$992.84	\$1,657.58
Walla Walla	\$38.80	\$0.00	\$38.80	\$0.00
	\$27,542.58	\$3,944.70	\$11,638.74	\$11,959.14

Sales by Month



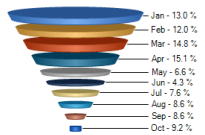
Orders by Shipper



Top Employees

First Name	Last Name	Count(Order ID)
Michael	Soyons	280
Margaret	Pezoski	654
Janet	Leverling	508
Andrew	Fuller	384
Nancy	Dawilo	490
Keita	Callahan	410
Anne	Dodsworth	172
Steven	Buchanan	168
Robert	King	280
		<b>3,326</b>

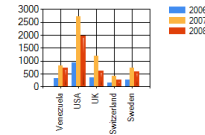
Expected Deals by Month



Top Countries

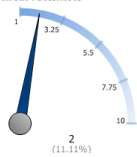
Ship Country	Sum(Freight)
Finland	\$1,821.78
Brazil	\$9,760.98
USA	\$27,542.58
Italy	\$1,728.88
Germany	\$22,566.56
Mexico	\$2,345.56
Argentina	\$1,197.16
Switzerland	\$2,737.06
Sweden	\$6,475.30
	<b>\$76,075.16</b>

Order By Volume

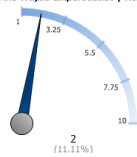


Gauge

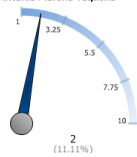
Alfreds Futterkiste



Ana Trujillo Emparedados y helados



Antonio Moreno Taqueria



Around the Horn

