ONESTREAM®

BI VIEWER

7.3.3 Release

ONESTREAM

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Introduction

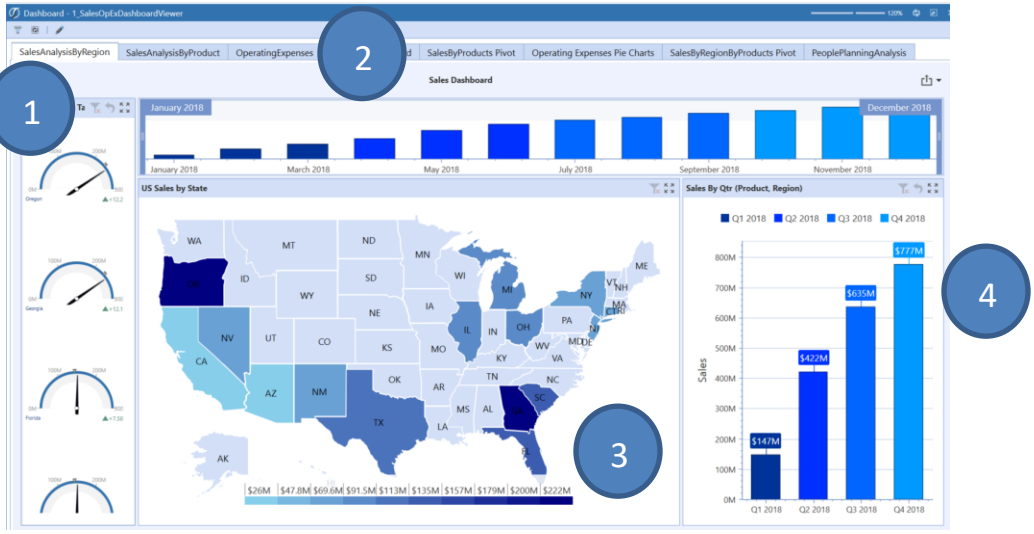
The purpose of the OneStream BI Dashboard Design and Reference Guide is to provide clarification, tips, best practices, and configurations for all XF implementers, administrators, and end users.

The OneStream BI DashboardDesign Guide is a collection of smaller guides and was created to enhance the XF experience by providing in depth explanations of specific functions, comprehensive reporting, and overall usage which can be applied to any XF application.

The OneStream BI Dashboard Reference Guide is an explanation of all properties, fields, and options found in XF. The Reference Guide is broken into four sub sections, XF Application, XF System, XF OnePlace, and XF Excel Add-in, and laid out in the same format as the XF application itself.

BI Viewer Overview: Sample Dashboard (runtime)

Here we will discuss and demonstrate a few of the dashboard items being used, how they are being used and their interactivity. This dashboard contains a series of dashboard items to visually demonstrate functionality that enables us to better review and analyze our data.



1. Gauges

The Gauge dashboard item displays a series of gauges. Each gauge can communicate two values, one with a needle and the other with a marker on the scale. The data items in the Gauge can control other dashboard items on the Dashboard by selecting (or multiselecting using Ctrl+click or Ctrl/Shift+click). This has been designed in the BI Designer for the end-user.

2. Range Filter

The Range Filter dashboard item allows you to apply date filtering to other dashboard items by using the slider on the dashboard items, selecting the respective month or right-click on the filter to get a custom filter to choose a range of months to filter. This item displays a chart (bar in this case) with selection thumbs that allow you to filter out values displayed along the argument axis.

3. Choropleth Map

Features available in the Map dashboard item, that allows you to colorize the required areas in proportion to the provided values. The data items (states) in the Map can control other dashboard items on the Dashboard by selecting (or multiselecting using Ctrl+click or Ctrl/Shift+click). This has been designed in the BI Designer for the end-user. See more info below on how to setup Single or Multiselect filtering

4. Bar Chart

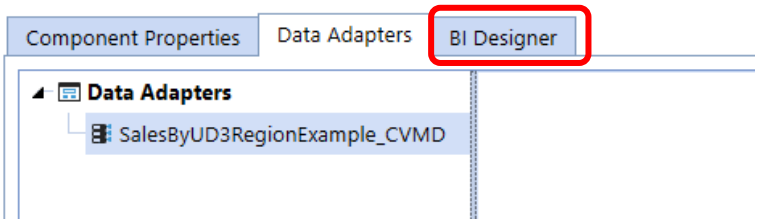
Item that displays information, with a single bar for each category. There are multiple data points in the Chart to allow the user to drill-through to obtain more information and analyze their data. This has been designed in the BI Designer for the end-user. The user can select or multiselect using Ctrl+click or Ctrl/Shift+click if defined at design time.

BI Viewer Component

The BI Viewer component is comprised of three main tabs; the Component Properties, Data Adapters and BI Designer.

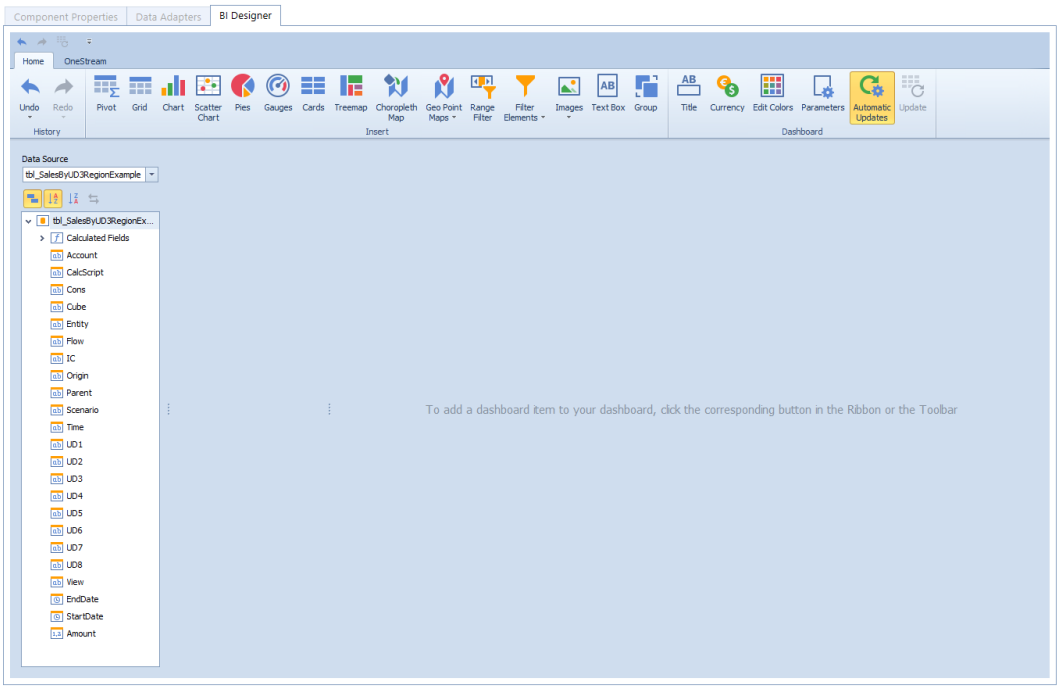
Once the BI Designer tab is selected within the BI Viewer component, a blank dashboard will display with the referenced Data Adapter as the Data Source with several dashboard items available to build the dashboard. In this area, Calculated Fields, and dashboard items will be added along with a few functional properties of each that will provide interactivity and drill down capabilities.

Next select the **BI Designer** tab to begin adding dashboard items



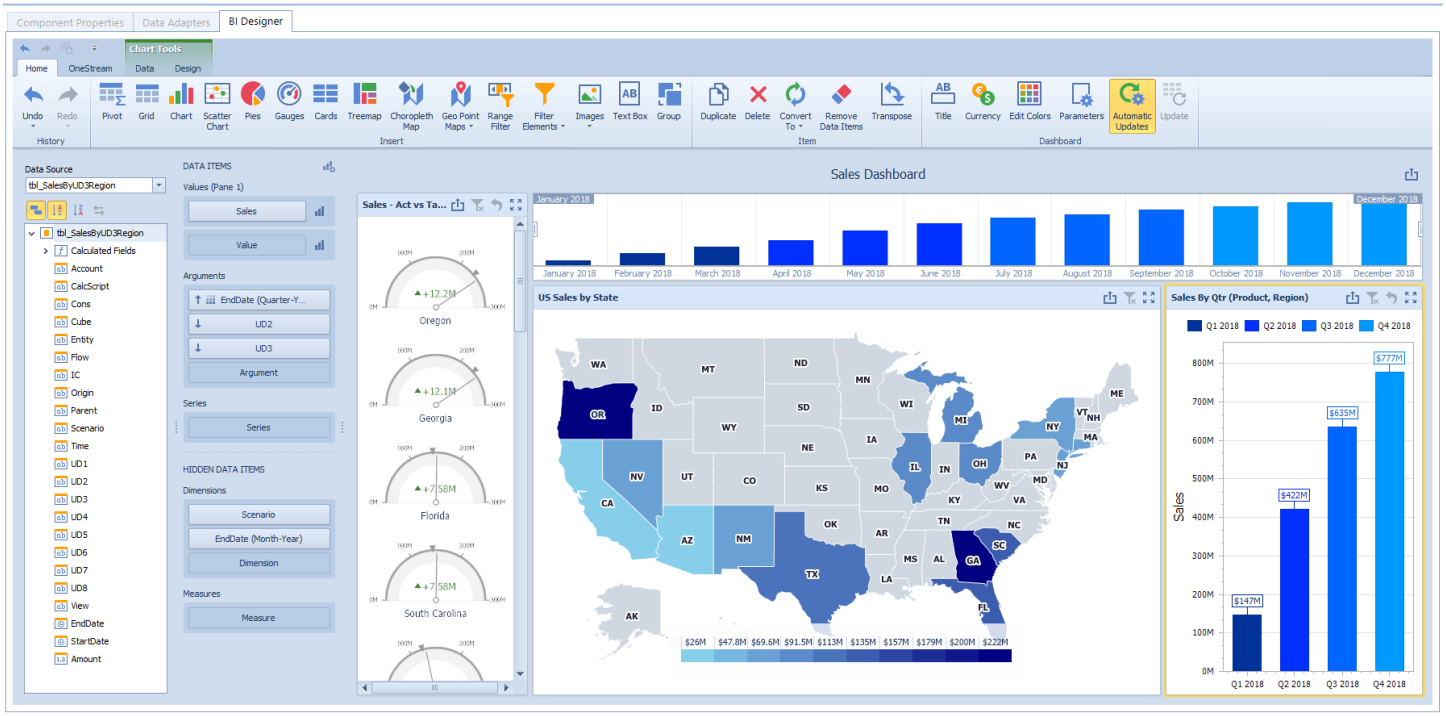
BI Designer Tab

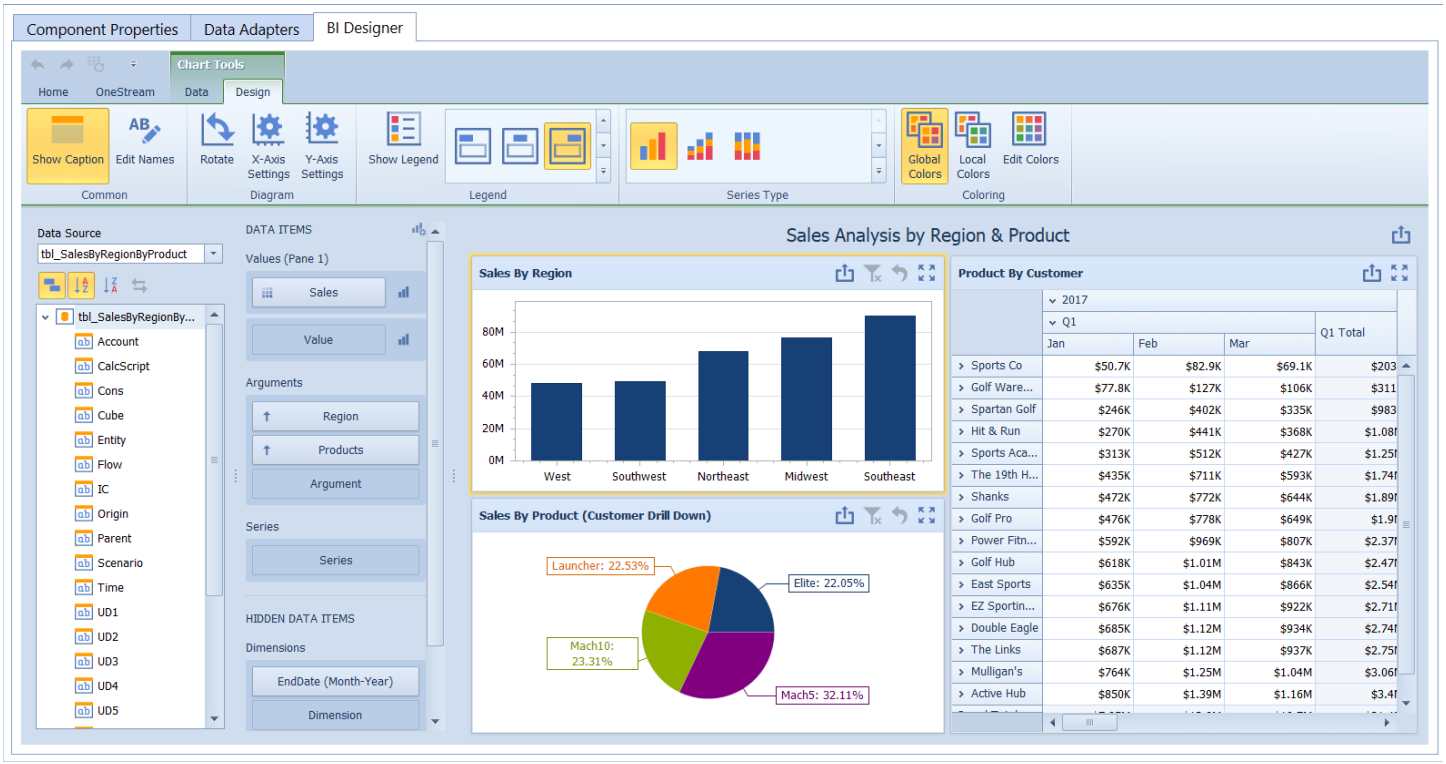
Once the BI Designer is selected the user is presented with the controls that provides the capability to build a functional dashboard. The dashboard provides elements that display visual or textual information in a dashboard known as dashboard items. These Dashboard items can be divided into the following groups: Data Visualization Items, Filter Elements and Dashboard Item Containers. To visualize data within dashboard items, you need to first establish a connection to a data source as mentioned above. The Data Source collects the Data Adapter data and passes it to the dashboard.



The BI Designer layout provides an intuitive user interface that facilitates data binding and shaping, and layout design. Many of these normally complex tasks can be accomplished with a simple drag-and-drop operation, allowing you to start creating dashboards immediately. This BI Designer contains rich, intuitive graphics and tools that will assist in analyzing data with functionality that requires little to no coding. Users would be able to combine multiple views of data to get better insight to their information, perform ad hoc analyses and quickly publish their dashboard to share it within the application.

Features of this solution assist with Ad Hoc Reports, Dashboard Data Analysis, Data Visualization, Key Performance Indicators, Drill down, filter(s) and interact with OneStream data and other sources of data.





Data Source

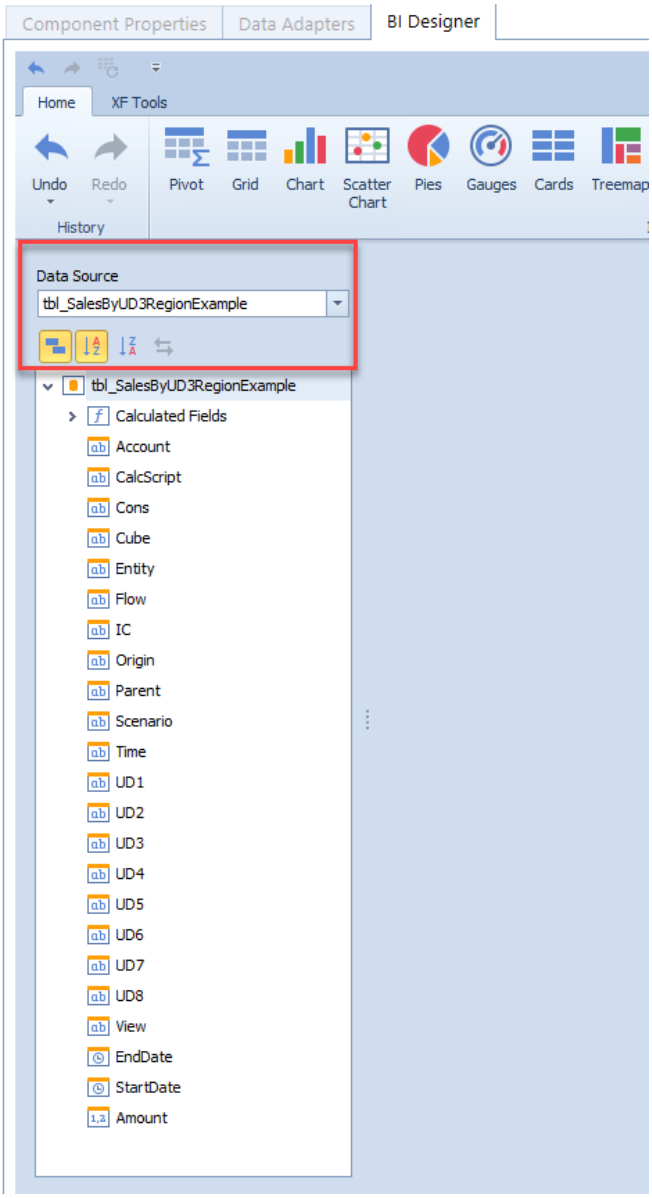
The **Data Source** section allows you to navigate through dashboard data provided from the Data Adapter. It displays the

data source structure and allows you to bind dashboard items to the required data source fields using drag-and-drop functionality. The Data Source section also enables you to manage calculated fields.

The Data Source Browser contains the following elements:

Data Source drop-down list allows you to select the required data source and its required data member.

The following **Command buttons** are available to sort or group fields in the browser:



Group Fields by Type.

and Sort Fields A to Z or Z to A.

The **Field List** displays data source fields. You can drag these fields to the data item placeholders to specify data binding.

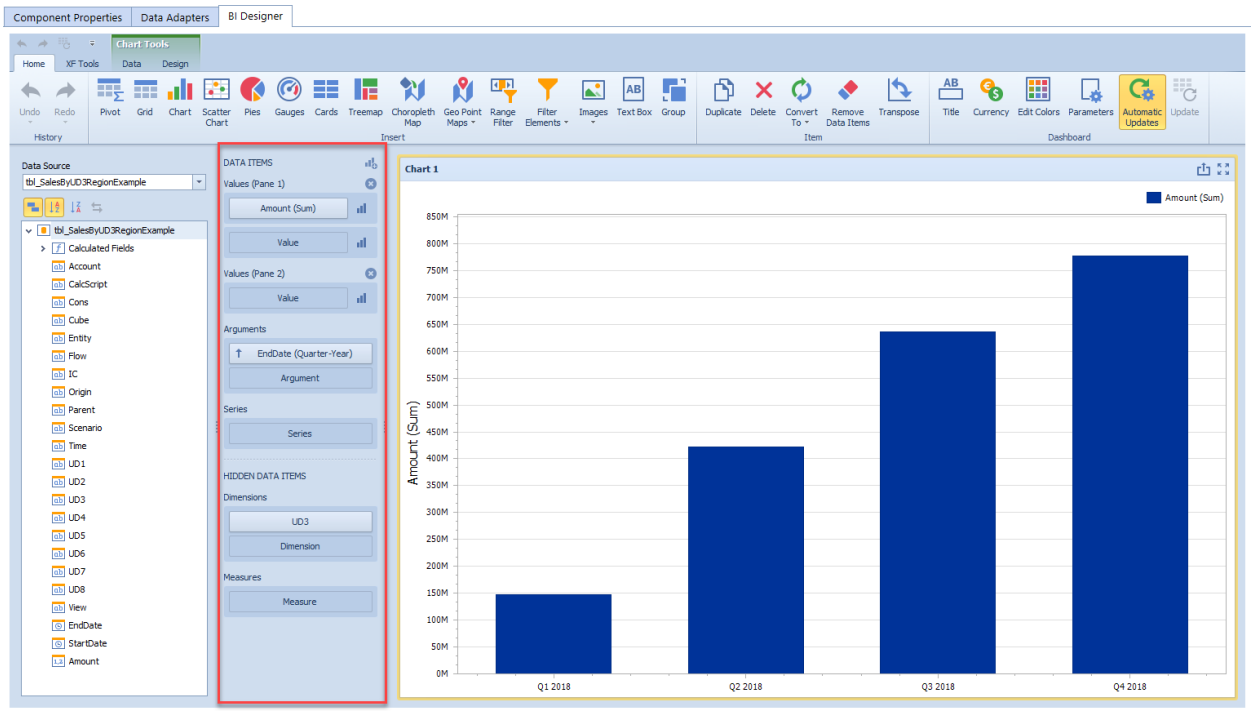
Data Source data field types define the field type of each field

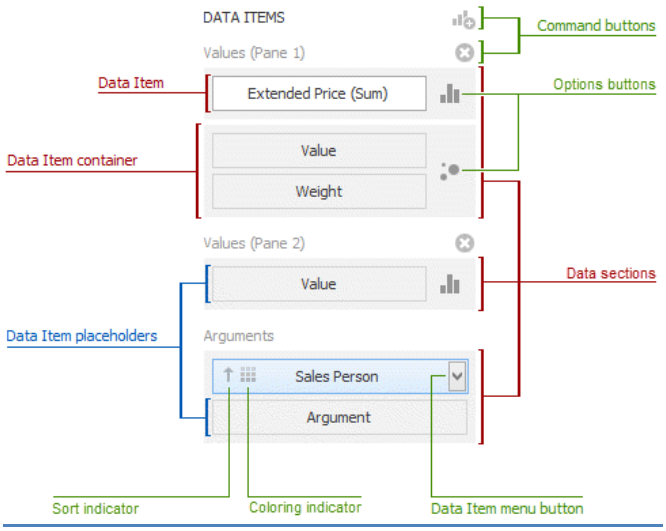
Icon	Description
	Boolean

Icon	Description
	Byte
	Date-time
	Numeric
	String
	Calculated field

DATA ITEMS pane

The DATA ITEMS pane is placed side-by-side with the Data Source Browser and allows you to create and modify data binding using drag-and-drop operations. The DATA ITEMS pane can contain the following elements.





Data Item placeholder

Creates data binding using drag-and-drop operations.

Data Item

Identifies data binding by mapping to a specified data source field. Each data item has the Data Item menu button, used to invoke a menu that allows you to perform various data shaping operations.

Data Section

Corresponds to a specified dashboard item area or element.

Data Item container

Provide *data item* sets (e.g., for calculating the difference between two measures). Data item containers have Options buttons that allow you to change specific dashboard item settings (e.g., to switch between chart series types or grid column types).

Sort indicator

Shows the current sort order for the data item.

Coloring indicator

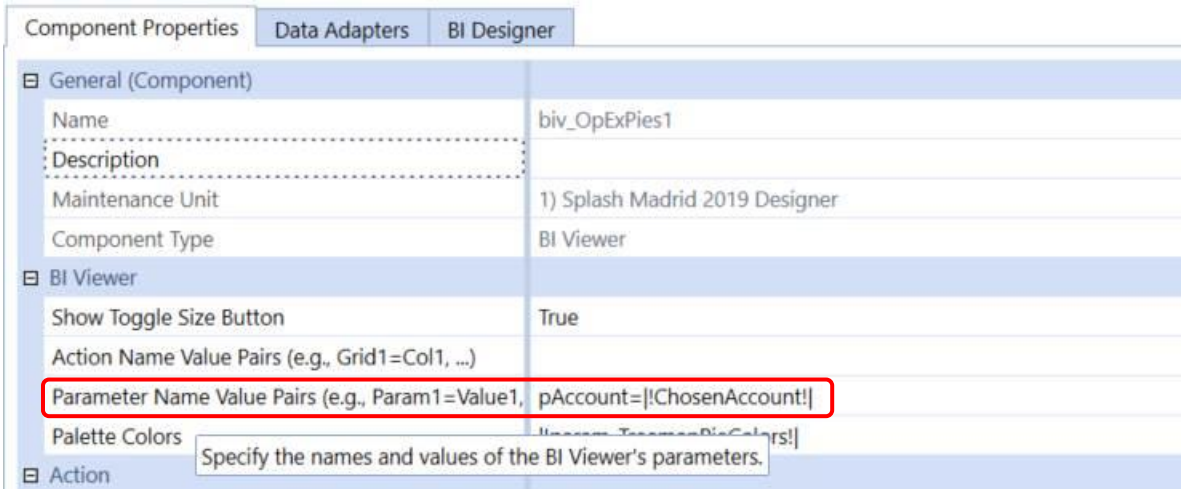
Indicates whether coloring by hue is enabled for the data item.

Parameters

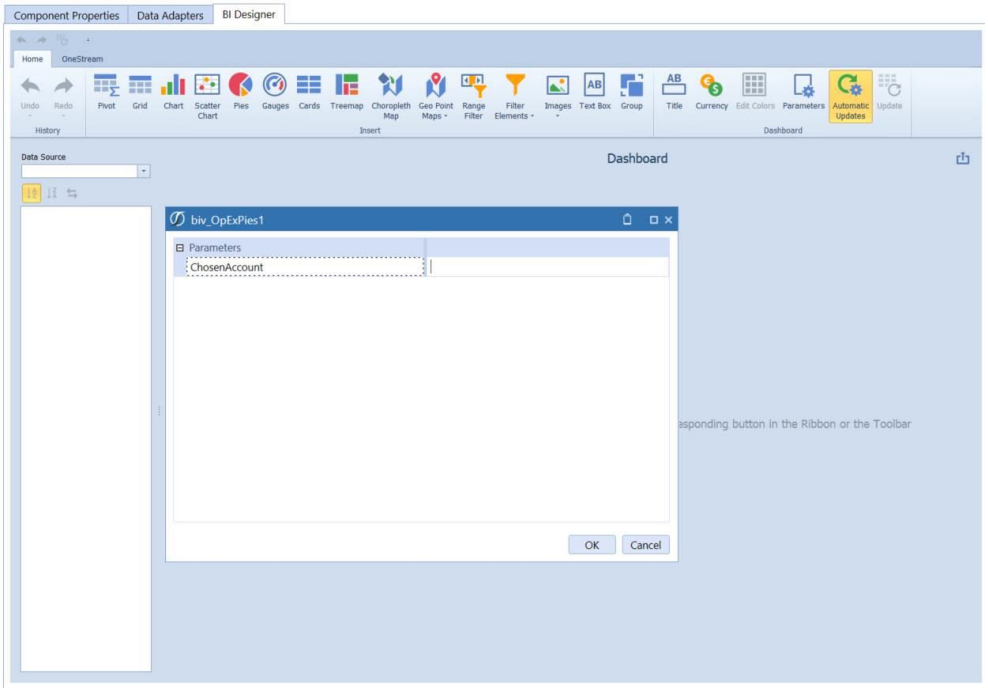
The BI Designer has its own section for parameters. These parameters can be used to filter on and drive the data shown in BI Viewer components (inbound parameter). There is also the ability for the BI Viewer to pass values from the BI Viewer components to other dashboard components (outbound parameters) outside of the BI Viewer.

Parameter Name Value Pairs (Inbound Parameter)

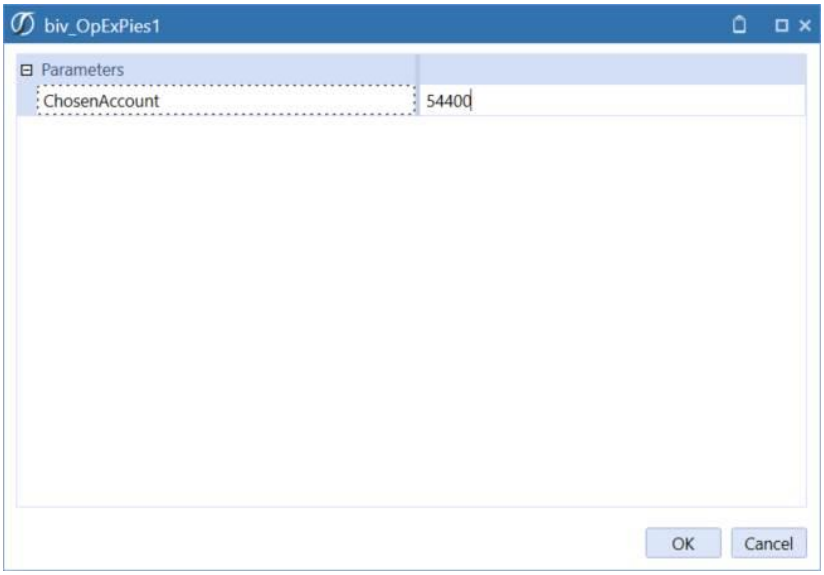
The Parameter Name Value Pairs property is used to assign a BI Viewer parameter to some value. This value can be a bound parameter.



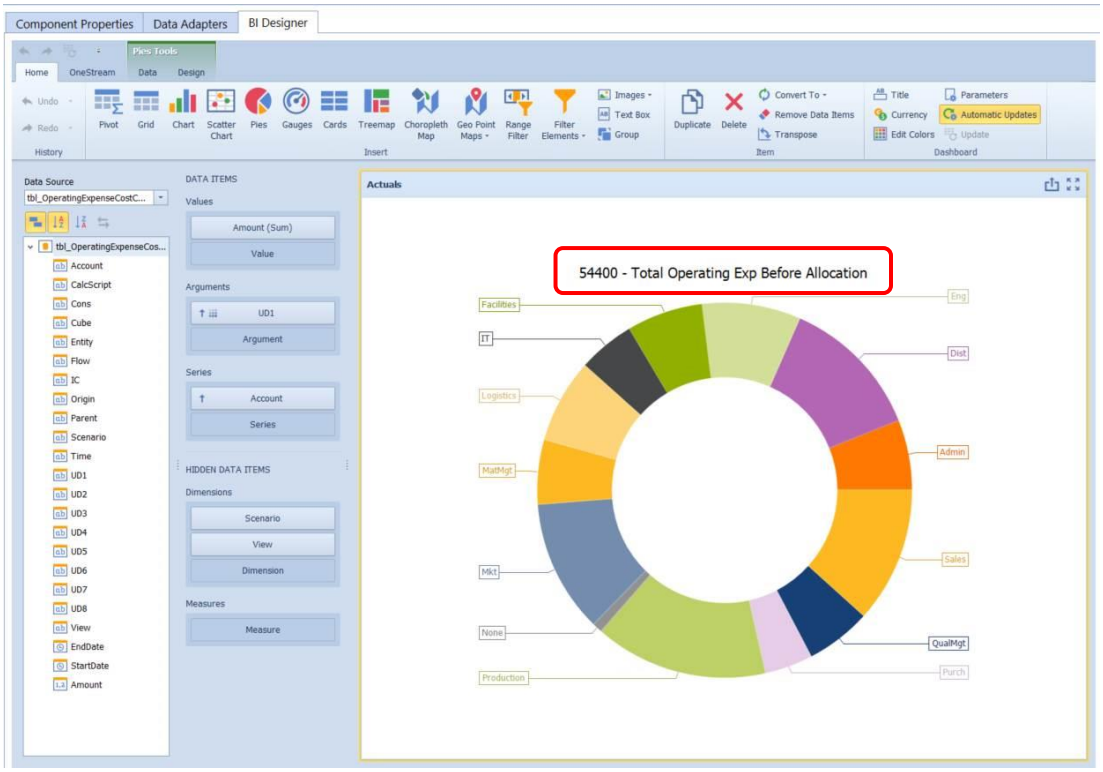
When the BI Designer is opened or the BI Viewer component is run inside a dashboard the specified BI Viewer parameter in the **Parameter Name Value Pairs** property (e.g. pAccount) will be set to the specified value (|!ChosenAccount!|) which in this case is set in the Cube View. If that value is a bound parameter, the value will be resolved before setting the BI Viewer parameter.



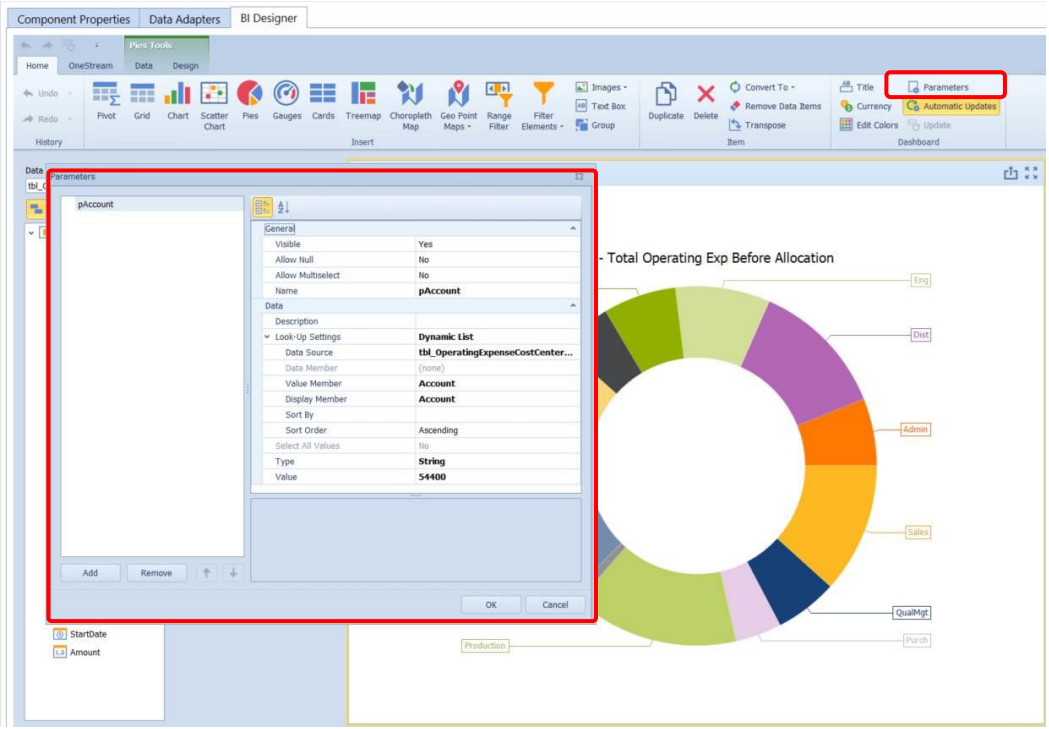
|!ChosenAccount!|is a dashboard bound parameter. In this case the value hasn't been resolved yet, so its value is prompted for.



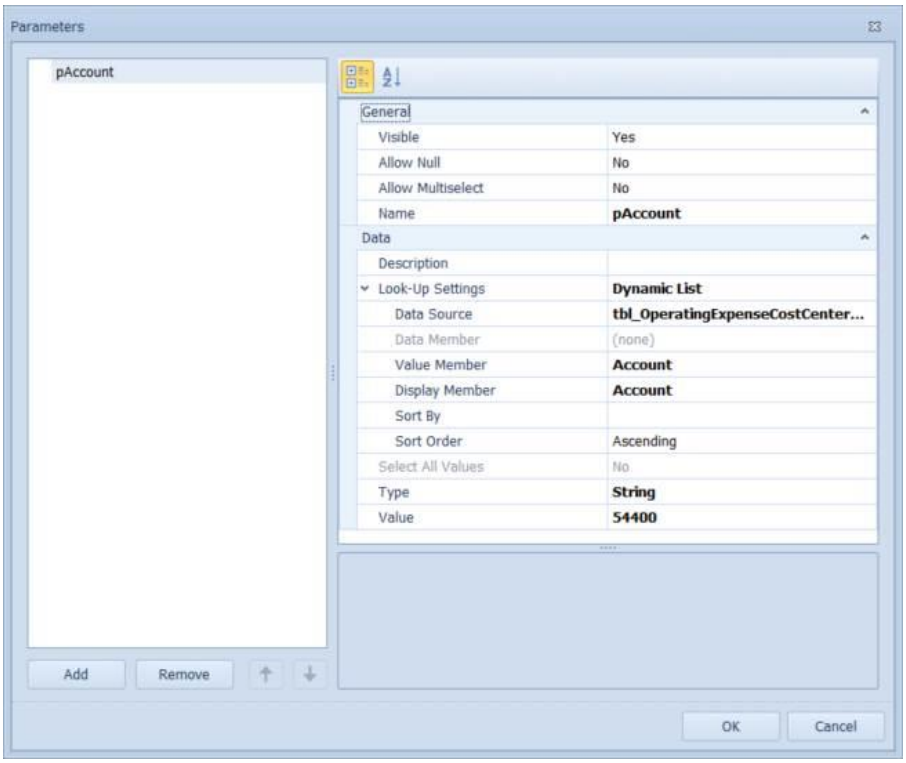
Once the value (54400) is entered at prompt time, the component (pie chart) will be displayed representing the value.



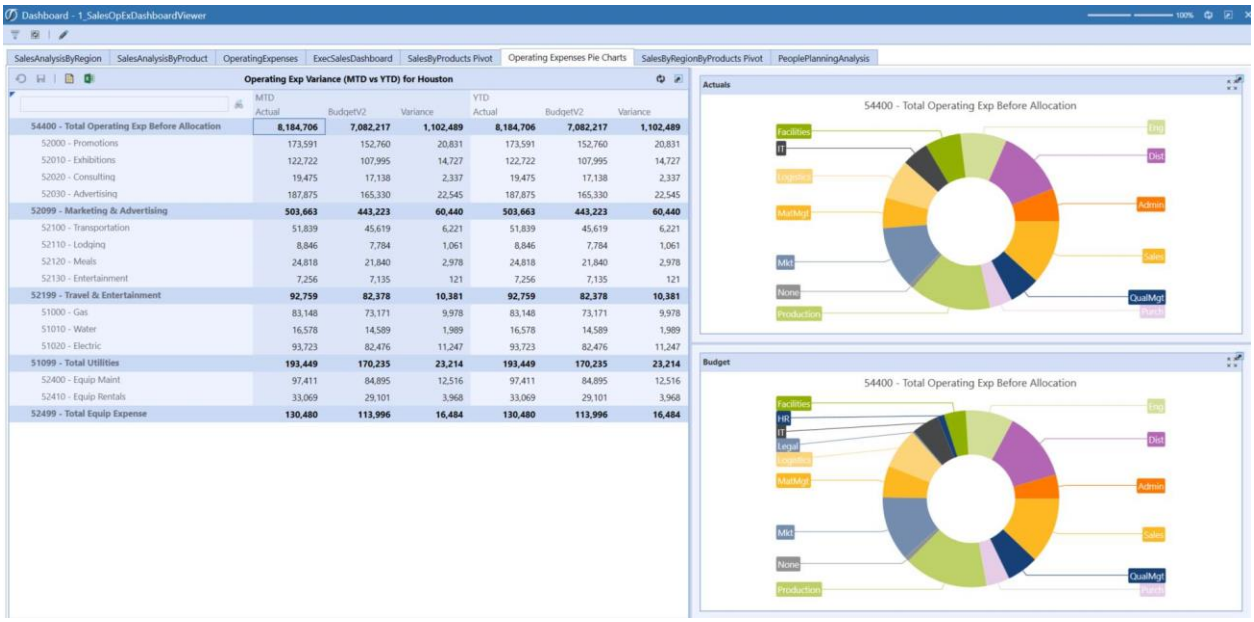
In the upper right corner of the toolbar inside the BI Designer there is a "Parameters" button. Clicking it will open the parameters dialog which is used to create BI Viewer parameters. Each parameter has its own settings for what values they can be set to and in what format.



In this case notice how the “Value” property was set to “54400”. This is due to the Parameter Name Value Pairs property set earlier (pAccount=|!ChosenAccount!|). The value of this BI Viewer parameter called pAccount was assigned to the value of the OneStream bound parameter |!ChosenAccount!|



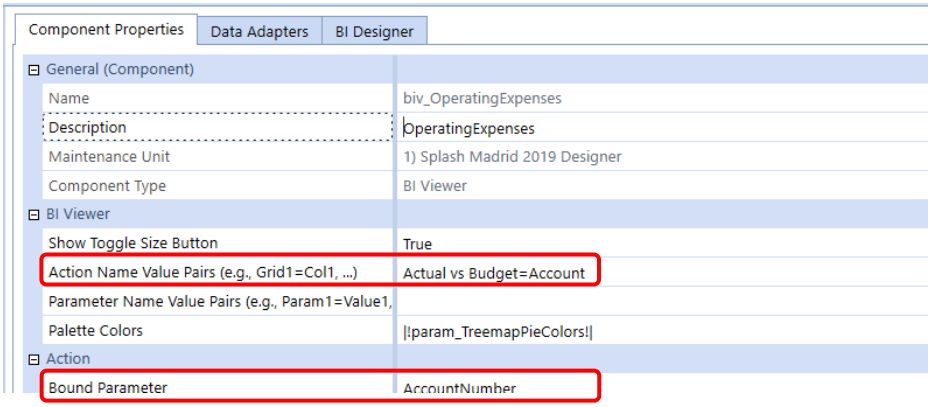
At runtime, the Pie Charts created in the BI Viewer will utilize the selected items (|!ChosenAccount!| from the Cube View to render its view.



Action Name Value Pairs (Outbound Parameter)/ Bound Parameter

The BI Designer has its own section for parameters. These parameters can be used to filter the BI Viewer and to pass values from the BI Viewer components to other dashboard components (outbound parameters) outside of the BI Viewer.

The Action Name Value Pairs property is used to assign a BI Viewer parameter to some value. This value can be a Bound Parameter.



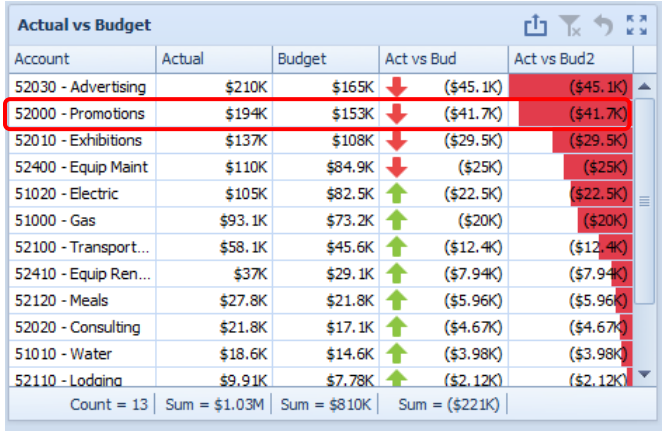
In the screenshot above, the Action Name Value Pairs property of “Actual vs Budget=Account” is used to assign that BI Viewer value to a Bound Parameter which is assigned “AccountNumber”.

In the screenshot below, the Grid component in the BI Viewer is the source of the Action Name Value Pairs property that is being used to assign a BI Viewer parameter to a Bound Parameter.

The name of the Grid component is “Actual vs Budget” and this along with the column “Account” is the source of the Action Name Value Pairs property used in the example above. The result is that anytime an Account (or multiple accounts -if setup) is selected at runtime, that selected Account value(s) will be passed to the designated Bound Parameter (AccountNumber).

If the row that contains “52000 – Promotions” is selected, the value of the Account from that row will be assigned to the

Bound Parameter.



Creating Dashboards

The following topics will guide you through the process of creating a dashboard.

Creating a Dashboard

Providing Data

Working with Data

Adding Dashboard Items

Binding Dashboard Items to Data

Designing Dashboard Items

Data Shaping

Interactivity

Appearance Customization

Data Analysis

Converting Dashboard Items

Dashboard Layout

Undo and Redo Operations

Automatic and Manual Updates

Saving a Dashboard

Printing and Exporting

The Dashboard Designer provides the capability to print or export the individual items of a dashboard, as well as the entire dashboard.

- Printing and Exporting

UI Elements

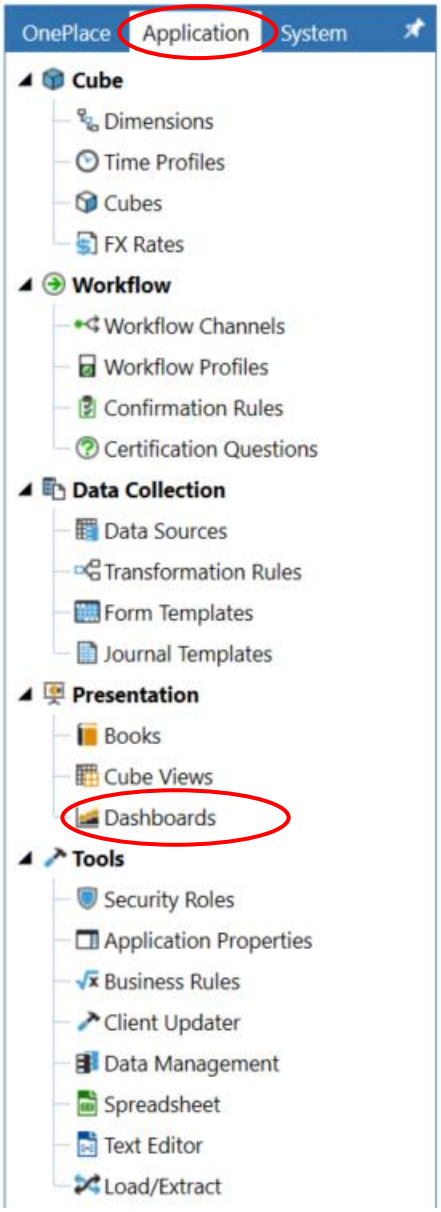
The topics in this section describe the main elements of a Dashboard Designer application.

- UI Elements

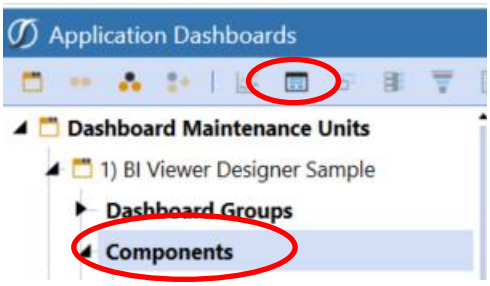
Creating a Dashboard

When you run an application containing the Dashboard Designer, it already contains an empty dashboard. To create a new dashboard, click the **New** button in the ribbon **Home** tab.

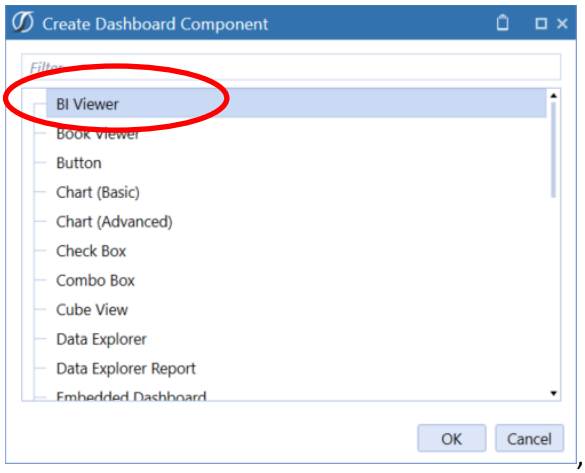
1. Go to **Application** tab and select **Dashboards.**



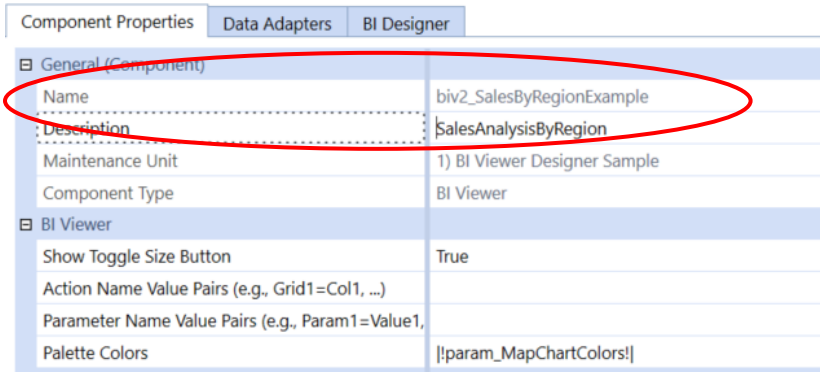
2. Select **Components** (in the Dashboard Maintenance Unit), then select **Create Dashboard Component**



3. Select **BI Viewer**



4. Enter a **Name: biv2_SalesByRegionExample**, **Description: SalesAnalysisByRegion** and select **Save**.



Providing Data

The topics in this section describe how to provide data to be visualized in the dashboard.

Data Adapters

Data Adapters specify the kind of data used within a Dashboard. Once the Data Adapter is configured and pointing to the desired data, attach it to a Dashboard Component in order to display it on a Dashboard.

General Properties

Name
The name of the Data Adapter.

Description
A quick description of the Data Adapter.

Maintenance Unit
The Maintenance Unit to which the Data Adapter belongs.

There are three command types:

Cube View

Choose a Cube View as the source of a Data Adapter. Additional options can be selected here to include supplemental information for the resulting tables. However, adding on to what is defaulted may have a slight impact on performance:

Cube View

This command type allows for a pre-configured Cube View to be the Data Source for a Dashboard. Click and begin typing the name of the Cube View in the blank field. As the first few letters are typed, the names are filtered making it easier to find and select the one desired. If the name is unknown, expand a Cube View Group and scroll through the list to select the correct one. Once the Cube View is selected, hit *CTRL* and *Double Click.* This will enter the correct name into the appropriate field.

Data Table Per Cube View Row
At the creation of the Data Adapter, the default is set to *True*. When set to *True*, a Data Table is created for each row in the Dashboard. This allows for conditional formatting per Cube View row. Set this to *False* in order to merge the rows into one table. This will omit any undefined Cube View row.

Include Title
At the creation of the Data Adapter, the default is set to False. When set to True, the title will be displayed from the Report section of the Cube View as the title for the Dashboard. Settings are True or False.

Include Header Left Label 1-4
At the creation of the Data Adapter, the default is set to *False.* When set to *True*, the left header labels will be displayed from the report section of the Cube View for the Dashboard.

Include Header Center Label 1-4
At the creation of the Data Adapter, the default is set to *False.* When set to *True*, the center header labels will be displayed from the report section of the Cube View for the Dashboard.

Include Header Right Label 1-4
At creation of the Data Adapter, the default is set to *False.* When set to *True,* the right header labels will be displayed from the report section of the Cube View for the Dashboard.

Include… POV

If set to *True,* the POV information for the Cube, Entity and all other Dimensions are included. Use these if the report or Dashboard needs this information.

Include Member Details
If set to *True,* additional Member property details are included in the results.

Include Row Navigation Link
If set to *True,* this data Adapter will include a row navigation link from a Cube View.

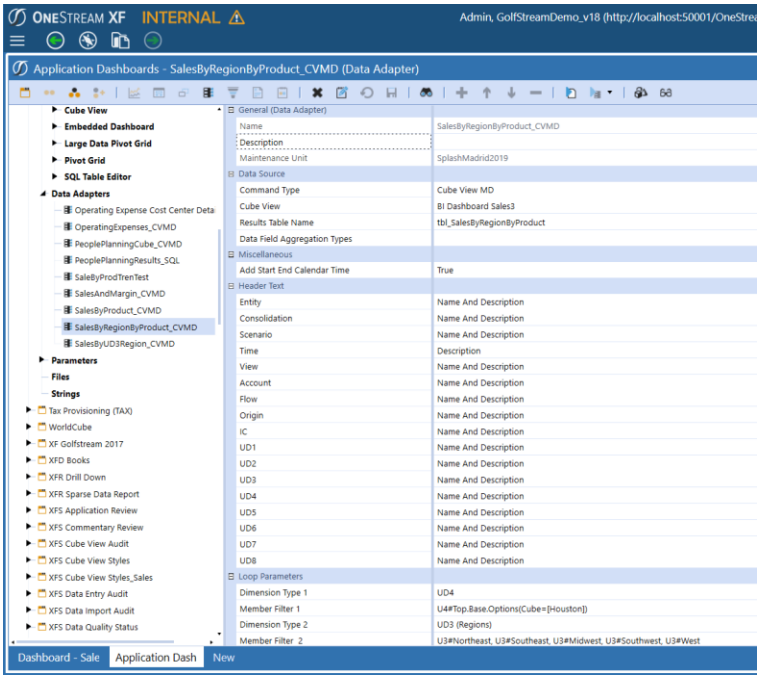
Include HasData Status
Includes additional true/false data on whether or not the row of results contains data for filtering purposes. Settings are True or False.

Include … View Member Text
This determines whether or not different Data Attachment text is going to be part of the results. This is necessary for showing text in a *Data Explorer* object or for using a *Waterfall Chart* and wanting to optionally show comments. Settings are True or False.

Results Table Name
This specifies the name of the resulting table generated when the Data Adapter is run, otherwise it will default with a name of *Table*.

Cube View MD

Choose a Cube View MD (Multi-Dimensional) as the source of a Data Adapter. This Command Type will return the selected Cube View as a Multidimensional Fact Table versus the reporting table that is returned by the Cube View Command Type. The results of the Cube View MD are OneStream Dimensions (Entity, Consolidation, Scenario, time, View, Account, Flow, Origin, IC, UD1-UD8) as columns. This simplifies the report building process in the BI Designer, Pivot Grid, Report Studio and Dashboard development. There are additional Loop Parameters options can be selected here to include supplemental information for the resulting tables. However, adding on to what is defaulted may have a slight impact on performance.



Cube View

This command type allows for a pre-configured Cube View to be the Data Source for a Dashboard. Click and begin typing the name of the Cube View in the blank field. As the first few letters are typed, the names are filtered making it

easier to find and select the one desired. If the name is unknown, expand a Cube View Group and scroll through the list to select the correct one. Once the Cube View is selected, hit *CTRL* and *Double Click.* This will enter the correct name into the appropriate field.

Results Table Name
This specifies the name of the resulting table generated when the Data Adapter is run, otherwise it will default with a name of *Table*. It is optional **but recommend that a name is defined here to distinguish between different Data Adapters if there are many assigned when using the BI Designer**.

For example; tbl_OperatingExpenses can be used to identify the Results Table Name and the Name of the Data Adapter (OperatingExpenses_CVMD in this example) associated with this table.

Add Start End Calendar Time
When set to *True*, the Data Table incorporates the Start and End Date used in the POV / Time Profile for the Cube View and creates two additional columns in a Date/Time Field Type Format; StartDate, EndDate for each row in the Dashboard. This allows for the ability to utilize the Date Grouping functions in the BI Designer. Set this to *False* to not add or display these Date Time fields.

Entity
At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and Description of the Entity. When set to Name, the Entity Name will be displayed in the results table from the Cube View. When set to Description, the Entity Description will be displayed in the results table from the Cube View.

Consolidation
At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and Description of the Consolidation. When set to Name, the Consolidation Name will be displayed in the results table from the Cube View. When set to Description, the Consolidation Description will be displayed in the results table from the Cube View.

Scenario
At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and Description of the Scenario. When set to Name, the Scenario Name will be displayed in the results table from the Cube View. When set to Description, the Scenario Description will be displayed in the results table from the Cube View.

Time
At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and Description of the Time. When set to Name, the Time Name will be displayed in the results table from the Cube View. When set to Description, the Time Description will be displayed in the results table from the Cube View.

View
At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and Description of the View. When set to Name, the View Name will be displayed in the results table from the Cube View. When set to Description, the View Description will be displayed in the results table from the Cube View.

Account
At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and Description of the Account. When set to Name, the Account Name will be displayed in the results table from the Cube View. When set to Description, the Account Description will be displayed in the results table from the Cube View.

Flow
At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and Description of the Flow. When set to Name, the Flow Name will be displayed in the results table from the Cube View. When set to Description, the Flow Description will be displayed in the results table from the Cube View.

Origin
At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and

Description of the Origin. When set to Name, the Origin Name will be displayed in the results table from the Cube View. When set to Description, the Origin Description will be displayed in the results table from the Cube View.

IC

At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and Description of the IC. When set to Name, the IC Name will be displayed in the results table from the Cube View. When set to Description, the IC Description will be displayed in the results table from the Cube View.

UD1-UD8

At the creation of the Data Adapter, the default is set to **Name And Description**. This will display both the Name and Description of the UD1-UD8. When set to Name, the UD1-UD8 Name will be displayed in the results table from the Cube View. When set to Description, the UD1-UD8 Description will be displayed in the results table from the Cube View.

Loop Parameters
This section allows changes to be made to the output of a Cube View definition being used in a table for reporting. The Loop Parameter filters the results and considers the additional parameters to be passed to the Cube View definition and add those results to the table accordingly.

The parameter(s) overrides the POV. So, if the Entity POV is set to CT, and the loop filter parameters are set to NY, MA, and NJ, then data for those will be returned and NOT CT. A Loop must be used in order to change parameters.

For example, a Loop Parameter may be used to loop through a list of Entities in the Cube View definition and return multiple Entities for that specific Cube View. The Dimension Type and Member Filters should be added here to pass along the appropriate Loop (e.g. Dimension Type=Entity, Member Filter= E#US.Base) which applies to each Entity included in the Loop.

Note: It is recommended to not loop on any Dimensions that already exist in the Cube View's rows or columns.

At the creation of the Data Adapter, the default for each Dimension Type (1 & 2) are set to (Not Used) and Member Filter (1&2) are greyed out. This will display the results without any consideration of additional parameters to pass to the query. When the Dimension Types are set along with the Member Filters, the results will consider the additional parameters to be passed to the Cube View definition and add those results to the table accordingly.

Dimension Type 1
The Dimension Type containing the list of Members. *e.g., Entity* or *Account*

At the creation of the Data Adapter, the default for each Dimension Type (1 & 2) are set to (Not Used) and Member Filter (1&2) are greyed out. This will display the results without any consideration of additional parameters to pass to the query. When the Dimension Types are set along with the Member Filters, the results will consider the additional parameters to be passed to the Cube View definition and add those results to the table accordingly.

Member Filter 1
Enter a Member Filter here to determine what is seen in the Parameter.

At the creation of the Data Adapter, the default for each Dimension Type 1 is set to (Not Used) and Member Filter 1 is greyed out. This will display the results without any consideration of additional parameters to pass to the query. When the Dimension Types are set along with the Member Filters, the results will consider the additional parameters to be passed to the Cube View definition and add those results to the table accordingly.

The name of the Dimension containing the list of Members. Start typing in the blank field OR click the ellipsis button in order to launch the Member Script Builder and enter a Member Script to change the Cube View definition. The example below is changing the POV for both the Products and Account.
Example: *UD2; U2#Top.Base*

Dimension Type 2
At the creation of the Data Adapter, the default for Dimension Type 2 is set to (Not Used) and Member Filter 2 is greyed out. This will display the results without any consideration of additional parameters to pass to the query. When the Dimension Types are set along with the Member Filters, the results will consider the additional parameters to be passed to the Cube View definition and add those results to the table accordingly.

Member Filter 2
Enter a Member Filter here to determine what is seen in the Parameter.

At the creation of the Data Adapter, the default for Dimension Type 2 is set to (Not Used) and Member Filter 2 is greyed out. This will display the results without any consideration of additional parameters to pass to the query. When the Dimension Types are set along with the Member Filters, the results will consider the additional parameters to be passed to the Cube View definition and add those results to the table accordingly.

The name of the Dimension containing the list of Members. Start typing in the blank field OR click the ellipsis button in order to launch the Member Script Builder and enter a Member Script to change the Cube View definition. The example below is changing the POV for both the Products and Account.
Example: *UD2; U2#Top.Base*

Method Query

Tip: In order to get an example of the Method Query format, leave the *Method Query* field blank in XF, press *Save,* and then press the *Test Data Adapter* icon. XF will then display the correct way to create the Method Query with an example.

Method Type

BusinessRule
Use the Business Rule option when creating a custom rule to incorporate within a Method Query. The Business Rule is used as the first set of {} within the Method Query.
Example Method Query: *{XFR_DataUnitCompare}{DataUnitComparisonDataSet}*
{Cube1=|!Members_Cubes!|, Entity1=|!Members_Entities_AllDims_Base!|, Parent1=[],
Cons1=|!Members_Cons_Statutory!|,
Scenario1=|!Members_Scenarios_AllDims_Base!|, Time1=|!Members_Time_WFYear_Base!|,
Cube2=|!Members_Cubes!|, Entity2=|!Members_Entities_AllDims_Base!|, Parent2=[],
Cons2=|!Members_Cons_Statutory!|, Scenario2=|!Members_Scenarios_AllDims_Base_Var!|,
Time2=|!Members_Time_WFYear_Base!|, View=|!Members_View_Numeric!|,
SuppressMatches=|!DataUnit_SuppressMatches!|}

CertificationforWorkflowUnit
This lists all Certification Questions for the particular Workflow Unit.
Example Method Query: *{Workflow Profile Name}{Scenario Name}{Time Name}{Include Descendants}{} or {Dallas}{Actual}{2011M2}{true}{}.*

ConfirmationforWorkflowUnit
This lists the Confirmation Rules results for a particular Workflow Unit.
Example Method Query: *{Workflow Profile Name}{Scenario Name}{Time Name}{Include Descendants}{Filter} or {Montreal}{Actual}{2011M6}{true}{} Name}{Include Descendants}{Filter} or {Montreal}{Actual}{2011M6}{true}{}*

DataUnit
This returns all rows of data related to the specified Data Unit *(i.e. Cube, Entity, Parent, Consolidation Member, Scenario, Time and View).*
Example Method Query: *{Cube}{Entity}{Parent}{Cons}{Scenario}{Time}{View} {True}{Empty String or Filter Expression}*

DataUnitComparison
This returns all rows from two different Data Units specified for comparison purposes.
Example Method Query: *{Cube1}{Entity1}{Parent1}{Cons1}{Scenario1}{Time1}*
{Cube2}{Entity2}{Parent2}{Cons2}{Scenario2}{Time2}{View}{True}{True}{Empty String or Filter Expression}

FormsStatusForWorkflowUnit
This lists detailed information about the Forms for a particular Workflow Unit.
Example Method Query: *{Workflow Profile Name}{Scenario Name}{Time Name}{Form Status}{Filter} or {Houston}{Actual}{2011M1}{All}{}*

Groups
This returns the Group ID, Name, Description and whether or not this is an Exclusion Group.
Method Query Example: *{GroupName = 'FinanceGroup'}*

GroupsforUsers
Select User properties and all of the Groups to which he/she belongs. This returns the same group properties as the *Group* Method Query.
Method Query Example: *{UserName = 'Administrator'}{}*

ICMatchingforWorkflowUnit
This returns a detailed Intercompany Matching Report table for the given Workflow Unit and several other Parameters. The Parameters here override what is already set up in the Workflow Profile.
Method Query Example: *{Workflow Profile Name}{Scenario Name}{Time Name}{Plug Account Override}{Suppress Matches Override}{Tolerance Override}{Filter}* or *{Flint}{Actual}{2011M1}{Empty String or A#MyPlugAccount}{Empty String or true/false}{Empty String or 0.0}{Empty String or Filter Expression}.*

ICMatchingPlugAccountsforWorkflowUnit
This returns the list of Intercompany Plug Accounts for a given Workflow Profile and Scenario Type configured for the Workflow Profile.
Method Query Example: *{MyWorkflowProfileName}{Actual}{2011M1}*
{PlugAccount for Workflow Parameter Set (Exclude A#)}{Empty String
or C#MyCurrencyOverride}{Empty String or V#MyViewOverride}{Empty String or
A#MyPlugAccountOverride}{Empty String or true/false}{Empty String or 0.0}{Empty String or
E#MyEntityOverride}{Empty String or E#MyPartnerOverride}{Empty String or MyDetailDimsOverride
(F#All:O#Top:U1#All:U2#All:U3#All:U4#All:U5#All:U6#All:U7#All:U8#All)}{Empty String or Filter Expression}

JournalforWorkflowUnit
This lists the Journals entered for a given Workflow Unit.
Example Method Query: *{Workflow Profile Name}{Scenario Name}{Time Name}{Journal Status}{Filter}* or *{Frankfurt}{Actual}{2011M3}{All}{}*

Members
This returns Dimension ID, Member information such as ID, Name and Description, and a few other properties for the chosen Dimension and Member Filter.
Method Query Example: *{Account}{MyAccountDim}{A#Root.TreeDescendants}*
{Empty String or Filter Expression}

UserCubeSliceRights
This lists each user's Data Access settings on a given Cube.
Example Method Query: *{UserName}{CubeName}{Filter}* or *{AllUsers}{AllCubes}{}.*

UserEntityRights
This returns the Cubes and Entities the user has access to according to the security settings under Entities.
Example Method Query: *{UserName}{CubeName}{Filter}* or *{US Clubs Controller}{AllCubes}{}.*

Users
This returns all properties associated for the chosen User Name.
Method Query Example: *{UserName = 'Administrator'}*

UserScenarioRights
This returns all accessible Scenarios and many related Scenario properties for the chosen User Name filter and Cube.
Method Query Example: *{AllUsers}{AllCubes}{Empty String or Filter Expression}*

UserinGroups
This returns a list of Users and selected User properties for the chosen User Group.
Method Query Example: *{GroupName = 'FinanceGroup'}{}*

UserWorkflowProfileRights
This lists the rights assigned to users for Workflow Profiles.

Example Method Query: *{User Name}{Workflow Cube Name}{Workflow Profile Type}{Filter}* or *{Administrator}{GolfStream}{AllProfiles}{}.*

WorkflowandEntityStatus
This returns properties for Workflow status, status code/description, last executed step, date/time information, completed steps, and data status for the chosen Workflow Unit including both the Workflow Profile level and individual Entity level.
Method Query Example: *{MyWorkflowProfileName}{Actual}{2011M1}*
{AllProfiles}{Descendants}{Empty String or Filter Expression}

WorkflowCalculationEntities
This lists the Entities that appear under Calculation Definitions for this Workflow Profile.

WorkflowConfirmationEntites
This lists the Entities that appear under Calculation Definitions with a *Confirmed* check box for this Workflow Profile.

WorkflowProfileandDescendantEntities
This creates a list of Entities and all descendants located under Entity Assignment for this Workflow Profile.

WorkflowProfileEntities
This creates a list of Entities located under Entity Assignment for this Workflow Profile.

WorkflowProfileRelatives
This lists related Workflow Profiles based on certain criteria.
Example Method Query: *{Workflow Profile Name}{Scenario Name}{Time Name}{Workflow Profile Type}{Relative Type}{Include Requesting Profile}{Filter}* or *{GolfStream}{Actual}{2011M1}{AllProfiles}{Descendants}{true}{}.*

WorkflowProfiles
This lists the Workflow Profiles.
Example Method Query: *{WorkflowProfileType}{Filter}* or *{AllProfiles}{Type = 'InputAdjChild'}.*

WorkflowStatus
This lists the status, lock status and last step completed of a given Workflow Unit.
Example Method Query: *{Workflow Profile Name}{Scenario Name}{Time Name}{Workflow Profile Type}{Relative Type}{Filter}* or *{Houston}{Actual}{2011M1}{AllProfiles}{Descendants}{}*

WorkflowStatusTwelvePeriod
This returns status value and text summary for 12 months for a given Workflow Profile, Scenario and Year. For Workflow Profile Type, options are *AllProfiles, CubeRoot, Default, Review, BaseInput, InputImportChild, InputFormsChild, InputAdjChild and ParentInput.*
Method Query Example: *{MyWorkflowProfileName}{Actual}{2011}{AllProfiles}*
{Descendants}{Empty String or Filter Expression}

Method Query
The query ran for this Data Adapter.

Results Table Name
This specifies the name of the resulting table generated when the Data Adapter is run, otherwise it will default with a name of *Table.*

Method Query Parameter Options

Workflow Profile Type
AllProfiles, AllProfilesExceptInputChild, AllProfilesWithTemplates, AllTemplates, BaseAndParentInputProfile, BaseInput, ClassStandardProfiles, ClassTemplateProfiles, CubeRoot, Default, InputAdjChild, InputChildren, InputFormsChild, InputImportChild, NonInputParentProfiles, ParentInput and Review.

Workflow Profile Relative Type
Ancestors, Descendants, FirstLevelChildren, Siblings and Unrelated.

Workflow Status or Forms Status
Completed, HasError, InProcess, NoStatus, NotExecuted and Unknown.

Journal Status
Approved, Posted, Rejected, Submitted

SQL

A SQL query against either the Application or Framework database can be written as a Data Source. Reference substitution variables such as *|WFProfile|* from within the SQL statement.

Database Location

Application
The current OneStream Application database where Stage and financial Cube data resides.

Framework
The connected OneStream Framework database where security and log data resides.

External
Any other database outside of OneStream.

External Database Connection
If *External* is the chosen *Database Location*, select the *External Database Connection* name here. This list is defined in the *OneStream Server Configuration Utility*.

SQL Query
The SQL statement ran for this *Data Adapter*.

Results Table List
This specifies the name of the resulting table generated when the Data Adapter is run, otherwise it will default with a name of *Table.*

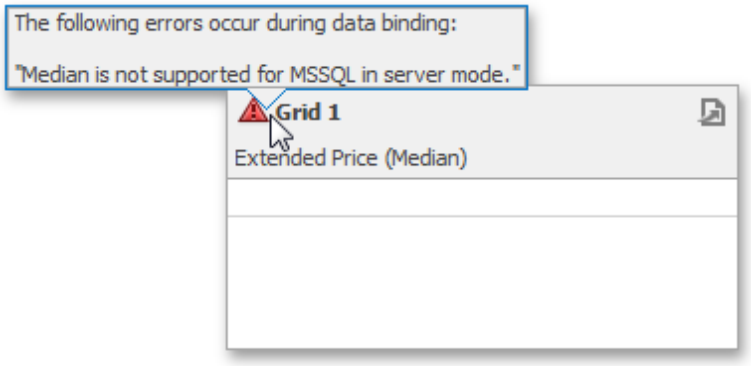
BI-Blend Data Adapter

The BI-Blend Adapter is used to simplify writing queries to the BI-Blend tables by eliminating the need for SQL scripting. As an Adapter, it cannot support the complete contents of very large BI-Blend tables. The BI-Blend Adapter should contain "where" clauses to slice the results into reporting slices. The BI-Blend Adapter does not support paging to manage large volumes of records.

⊟ General (Data Adapter)	
Name	BIBlend_DataAdapter
Description	BI Blend Adapter
Maintenance Unit	BIBlend
⊟ Data Source	
Command Type	BI-Blend
Results Table Name	BIBLEND1
Table Info	BIB_|AppName|_|WFText1|_|WFScenario|_|WFTime|
Group By	Entity,HoustonProducts,HoustonCustomers
Data Field Aggregation Types	AggType1 = [2018M1, Sum],AggType2 = [2018M1, Count]
Where Clause	HoustonCustomers= 'shanks'

Data Processing Errors

The Dashboard Designer provides the capability to display errors that occurred during data processing operations (such as changing measure summary types, calculation errors, etc.). For instance, the Grid below shows an error when the summary type of the E xten ded Price measure is set to Median in server mode.



To see the error message, hover the mouse pointer over the icon.

Working with Data

The topics in this section describe how to work with data in a connected data source.

This section contains the following topics.

Filter Queries

Pass Query Parameters Stored Procedures Preview Data

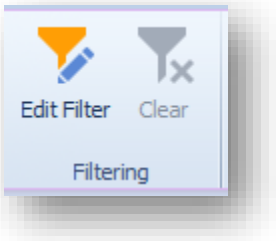
Creating Calculated Fields

Filter Editor

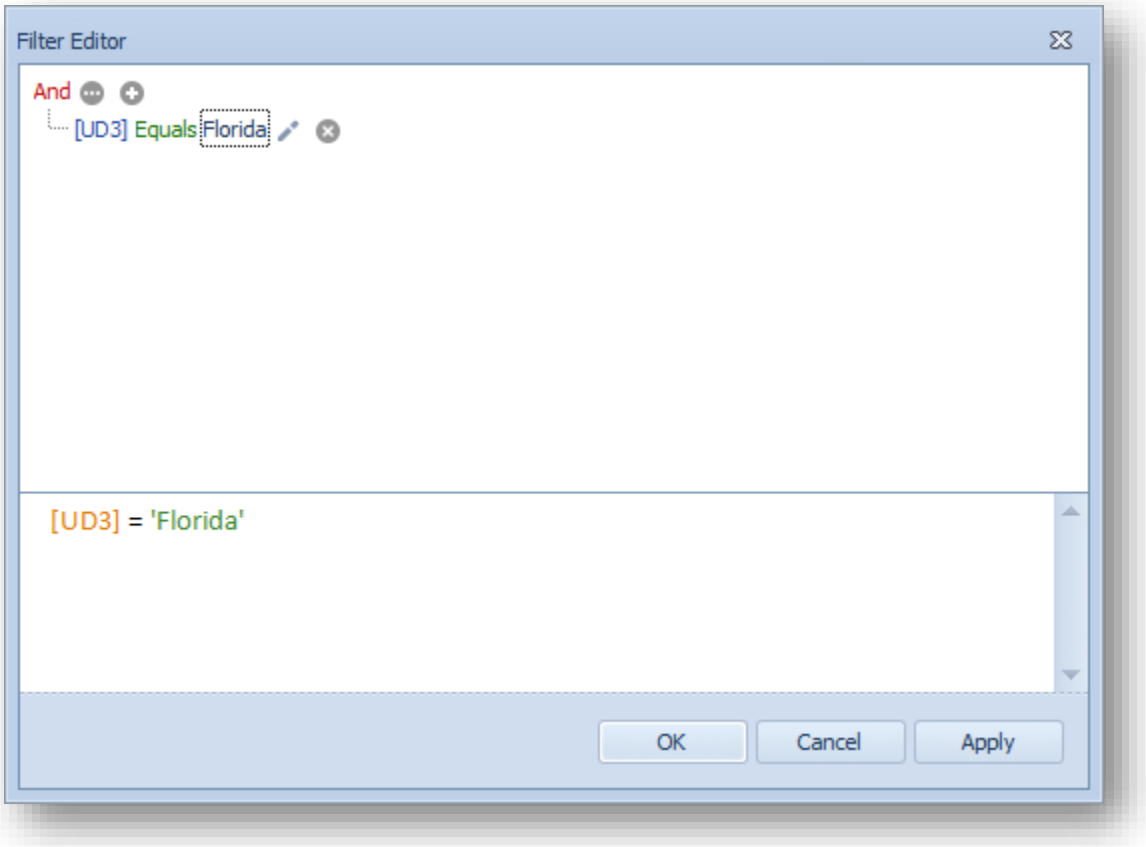
Filtering can be applied to either underlying or aggregated data.

Invoke the Filter Editor

To filter data in the , click the Edit Filter button in the Data ribbon tab.



... or right-click in dashboard item to invoke the Filter Editor dialog, which allows you to build filter criteria.



The Filter tab allows you to filter underlying data while the Group Filter tab provides the capability to filter data aggregated on the server side.

Filter Data

In the Filter Editor, you can compare a field value with the following objects.

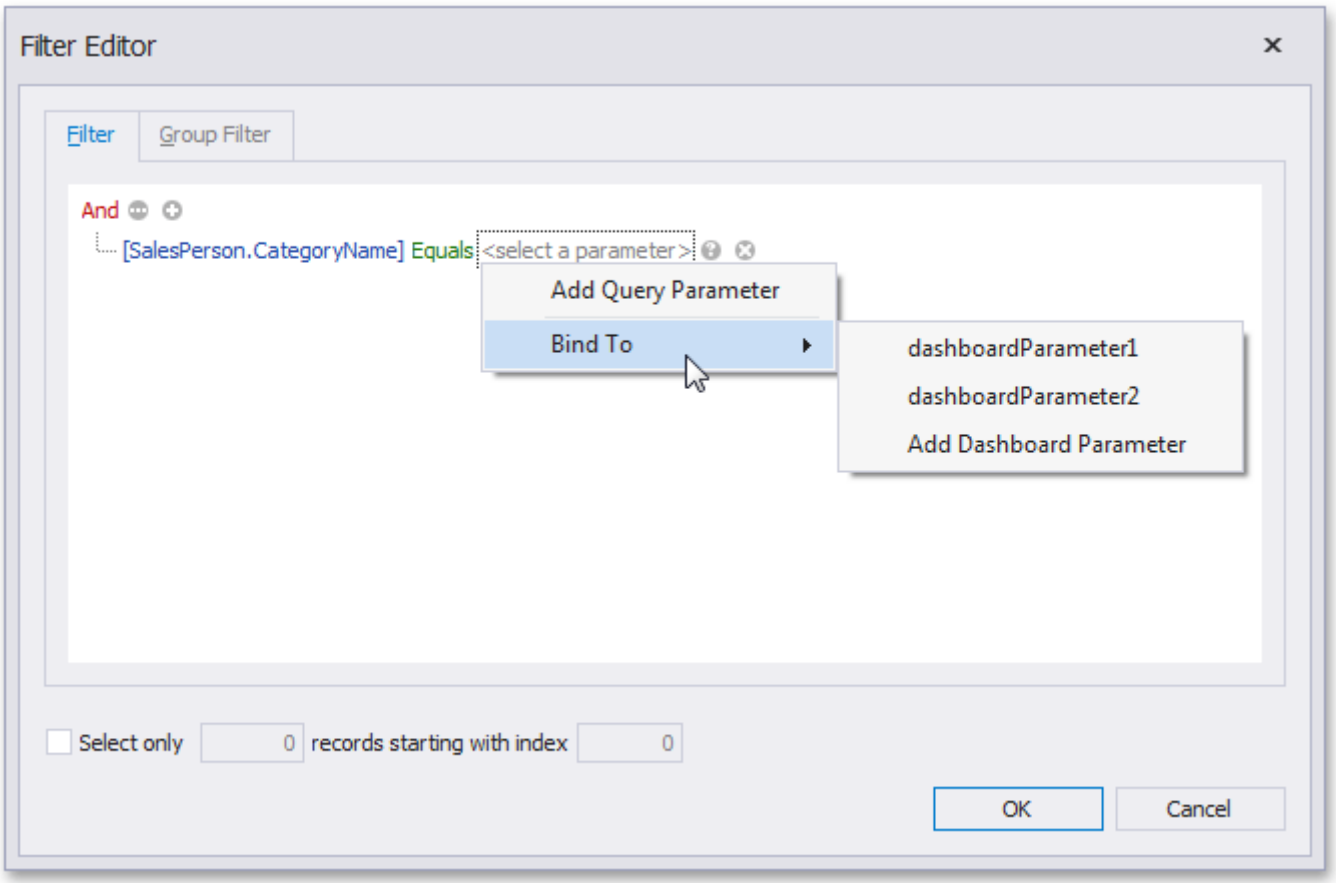
A static value (represented by the icon).

Click this button to switch to the next item mode ("another field value") to compare the field value with another field value.

An oth er field valu e (represented by the icon). Click this button to switch to the next item mode (parameter value) to compare the field value with a parameter value.

A parameter value (represented by the icon). Click this button to switch back to the initial mode ("static value") to compare the field value with a static value.

Thus, you can pass the query parameter to the filter string. To do this, click the button, then click the button and finally click <select a parameter>.

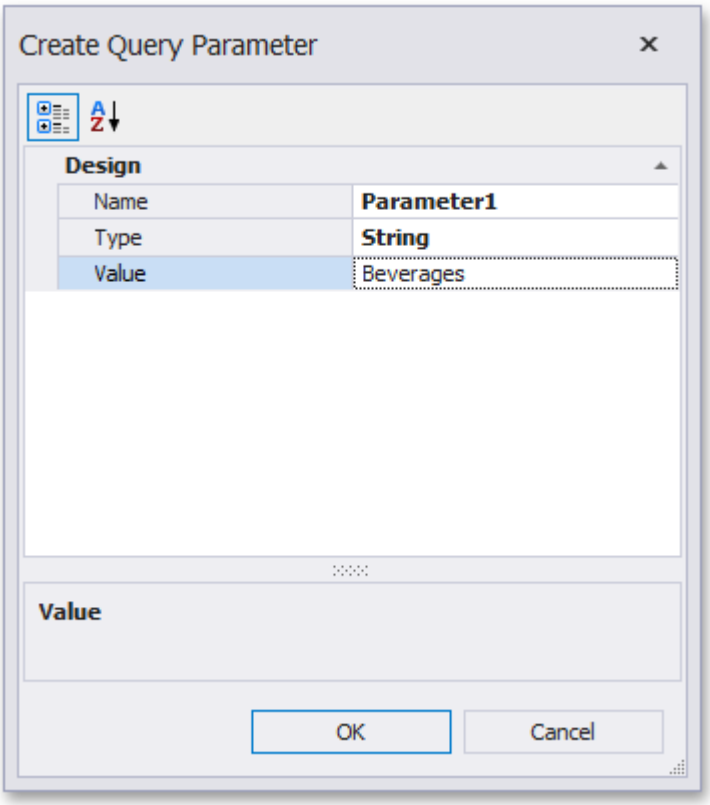


In the invoked popup menu, you can choose from the following options.

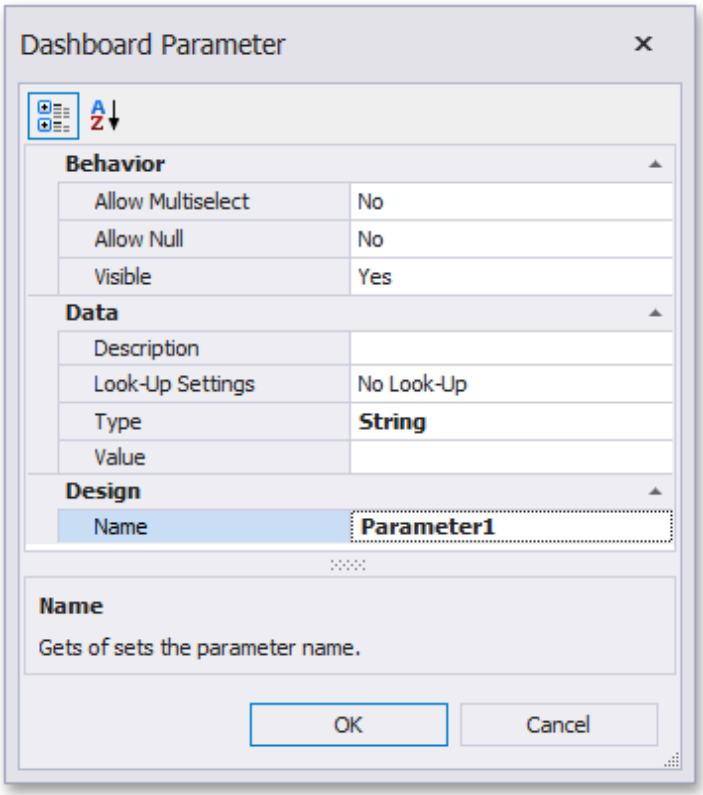
Add Query Parameter - allows you to create a new query parameter. The following dialog will be invoked.

In this dialog, you can specify a parameter's name (Name), type (Type) and value (Value).

If the current query already contains query parameters, they will be displayed within the popup menu.



Bind to - allows you to pass a dashboard parameter to a filter string. You can choose from the list of predefined dashboard parameters or create a new dashboard parameter by selecting Add Dashboard Parameter. If you selected Add Dashboard Parameter, the following dialog will be invoked.



Creating Calculated Fields

The Dashboard Designer provides the capability to create calculated fields that allow you to apply complex expressions to data fields that are obtained from the dashboard's data source. You can use these fields in data visualizations as regular data source fields.

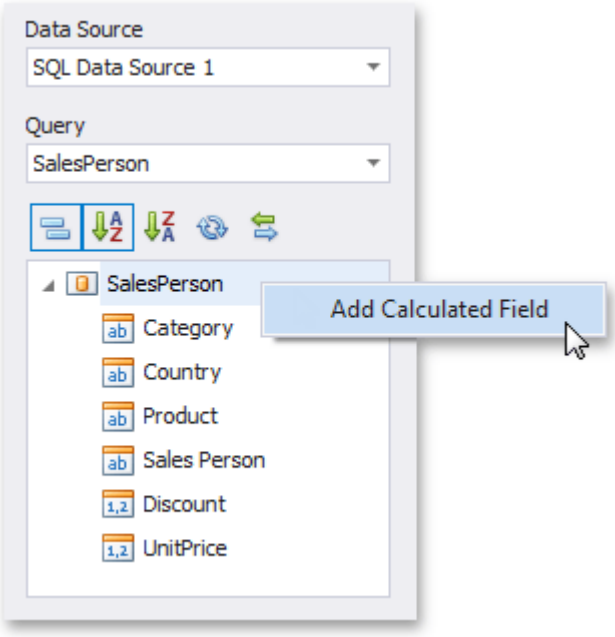
Creating a Calculated Field Editing a Calculated Field

Creating a Calculated Field

After you have created a data source, you can add a new calculated field based on the existing data source fields.

To create a calculated field, select the required data source (and the required query/data member, if applicable) in the Data Source Browser and click the Add Calculated Field button in the Ribbon's Data Source tab...

...or right-click the Field List and select Add Calculated Field in the context menu.



This invokes the Expression Editor dialog, which allows you to specify an expression that will be used to obtain calculated field values. Here, you can construct the required expression.

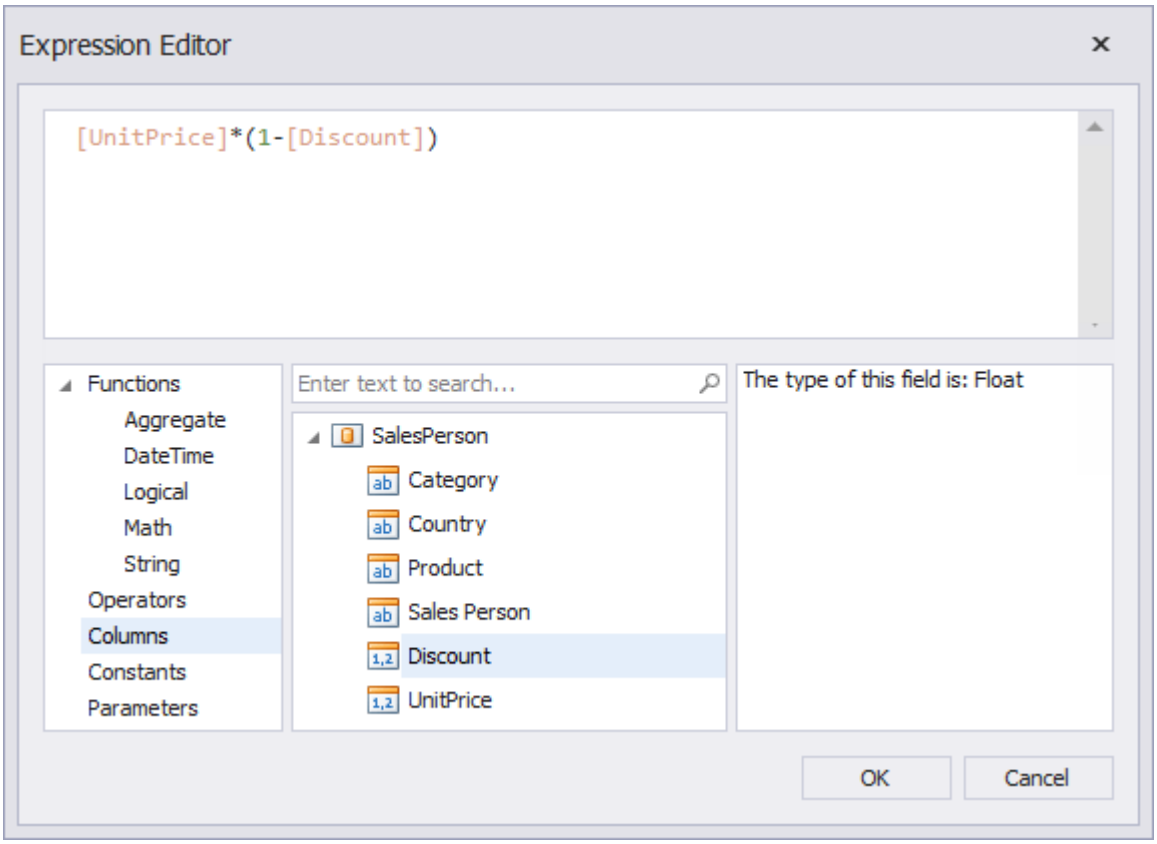
You can use the following elements in expressions.

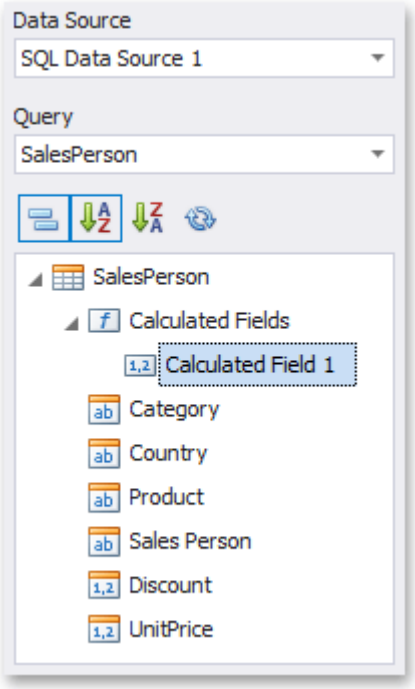
- Functions
- Operators
- Columns
- Constants
- Parameters

After the expression has been specified, click OK. This displays a new calculated field in the data source structure

Note

To learn how to use **Aggregate** functions, see Aggregations. The Expression Operators, Functions and Constants topic lists common functions (**DateTime**, **Math**, **String**, etc.) supported by expressions.

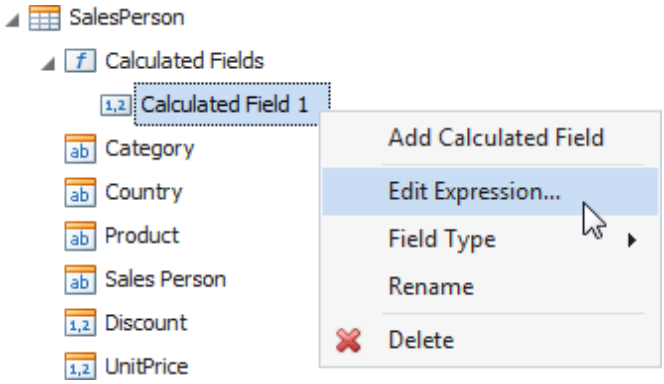




Now you can specify the required calculated field type, change its default name, etc.

Editing a Calculated Field

To edit a calculated field, use its context menu.

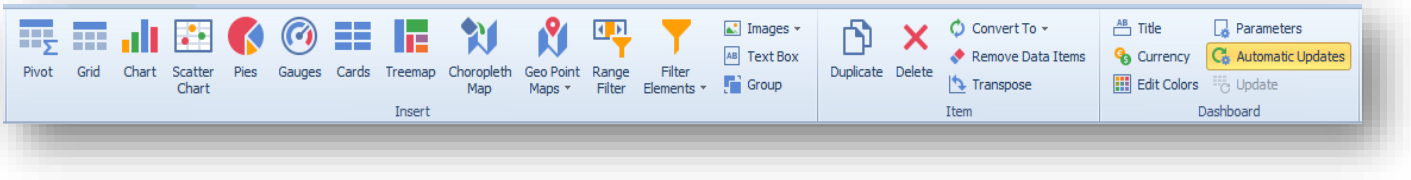


This menu contains the following items.

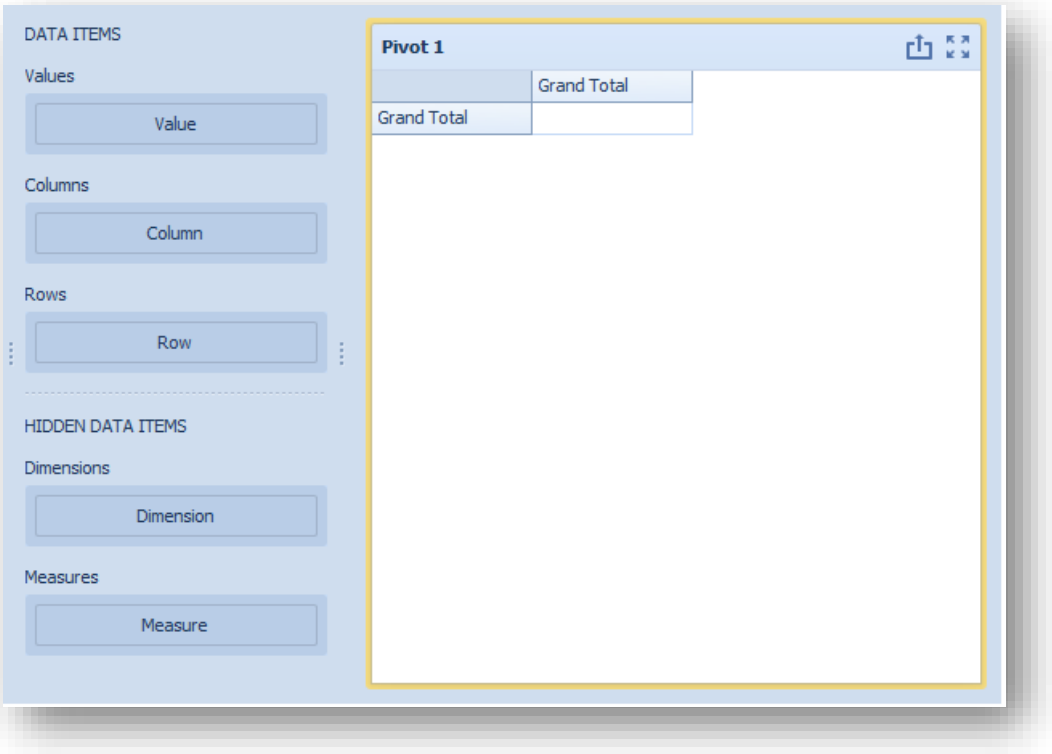
Item	Description
Edit Expression...	Invokes the Expression Editor dialog, which allows you to change an expression for an existing calculated field.
Field Type	Specifies the type of the calculated field.
Rename	Changes the calculated field name.
Delete	Removes the existing calculated field from the data source.

Adding Dashboard Items

To create a dashboard item in the Dashboard Designer, click the corresponding button in the Home ribbon tab.



This creates an empty dashboard item, and displays the required data sections for binding this item to data (for instance, the image below displays the Pivot dashboard item and corresponding data sections).



Perform the following steps to design a dashboard item.

- Bind the dashboard item to data.
- Perform the required data shaping operations (such as grouping, sorting and filtering). Use the interactivity features to enable interaction between various dashboard items.
- Adjust the dashboard item's position and size and specify the dashboard item caption settings.
- Specify specific dashboard item settings based on its type. To learn more, see Designing Dashboard Items

After you have created and designed the dashboard item, you can create an exact copy. To do this, click the

Duplicate button in the Home ribbon tab...

... or use the dashboard item's context menu. To remove the dashboard item from the dashboard, use the Delete button or the corresponding item in the context menu.

Binding Dashboard Items to Data

This section consists of the following topics.

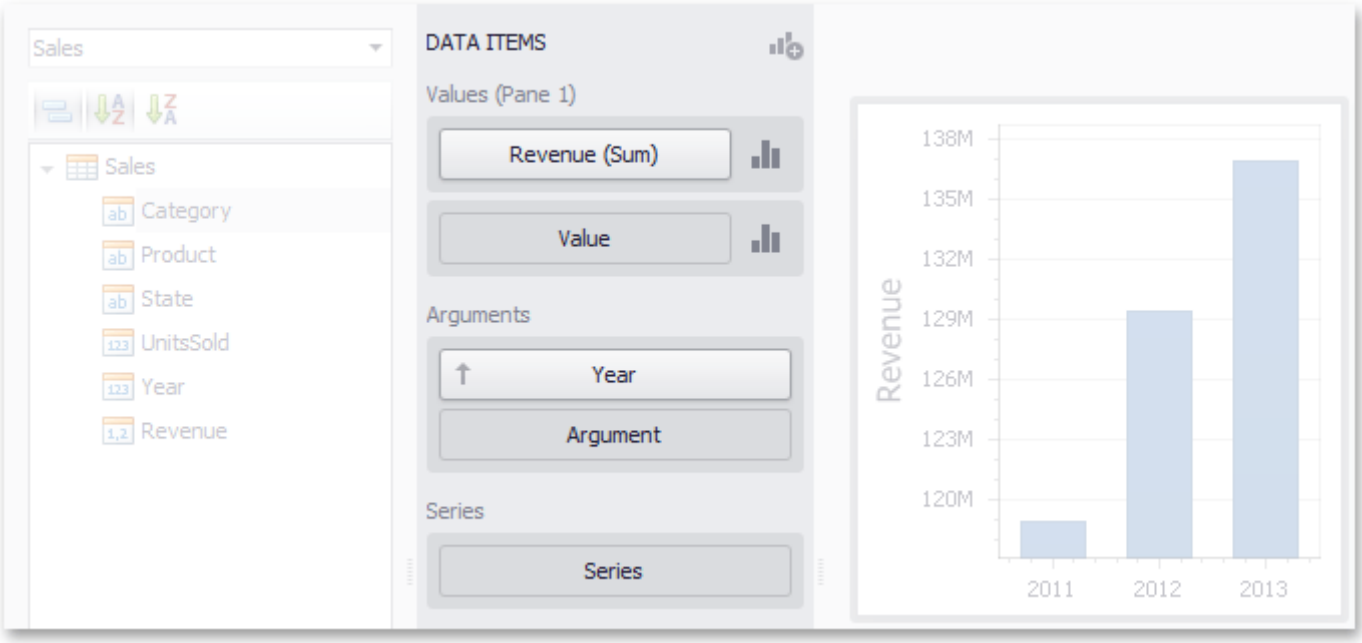
Binding Dashboard Items to Data Hidden Data Items

This topic explains how to bind the newly created dashboard item to data source fields, to display data.

- Binding Concepts
- Create Binding
- Modify Binding
- Clear Binding

Binding Concepts

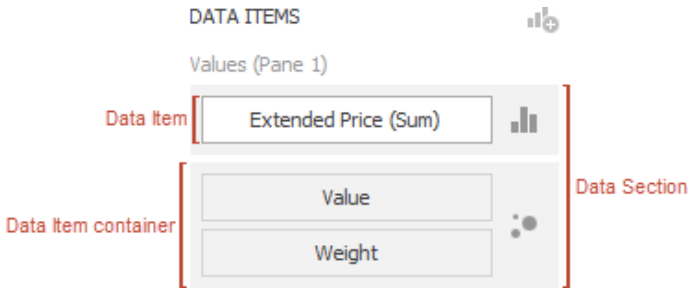
To bind dashboard items to data in the Dashboard Designer, the DATA ITEMS pane is used.



Each dashboard item type has a specific set of data sections, such as Values, Arguments and Series in the chart, Columns and Sparklines in the grid, and Values, Columns and Rows in the pivot grid. Each data section corresponds to a particular dashboard item area or element and should be mapped to data to be displayed within this area/ element.

Mapping is performed using data items - objects that are used to bind a dashboard item to data source fields. Data items are used to link the dashboard item to the required data source fields and, thus, visualize data within the dashboard item.

Another key concept in data binding is the data item container, which represents a set of data items. It can contain either a single data item or multiple data items, and allows you to specify various options related to how a specific dashboard item visualizes data.



The data item can process data in two ways - as dimensions or measures. This depends on the data section to which the data item is assigned, and the type of the data item container.

dimension - a data item whose values are not intended to be summarized.

These values can be of any type - string, date-time or numeric. In any case, the dashboard does not summarize the dimension values, but groups identical values. You can perform grouping, sorting, or display the top values for the dimension values. You can also customize data format settings for numeric and date-time values. To access the data shaping settings, use the data item's m en u bu tton.

For instance, dimensions are used to provide data for the chart argument axis, pivot grid column and row headers.

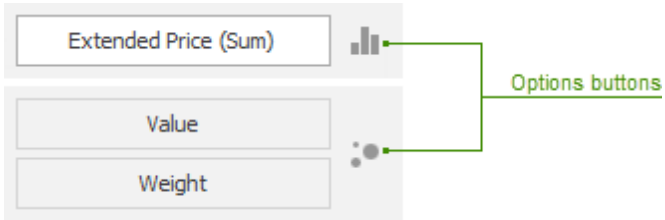
measure - a data item whose values are summarized before they are used in the dashboard.

These values can be of any type - numeric, date-time or string. In any case, the dashboard will calculate an appropriate summary function against measure values. You can also customize the data format settings that affect how summary values are displayed. To access these settings, use the data item's

menu button.

For example, measures are used to provide data for the chart's Y-axis, and to calculate pivot cell values.

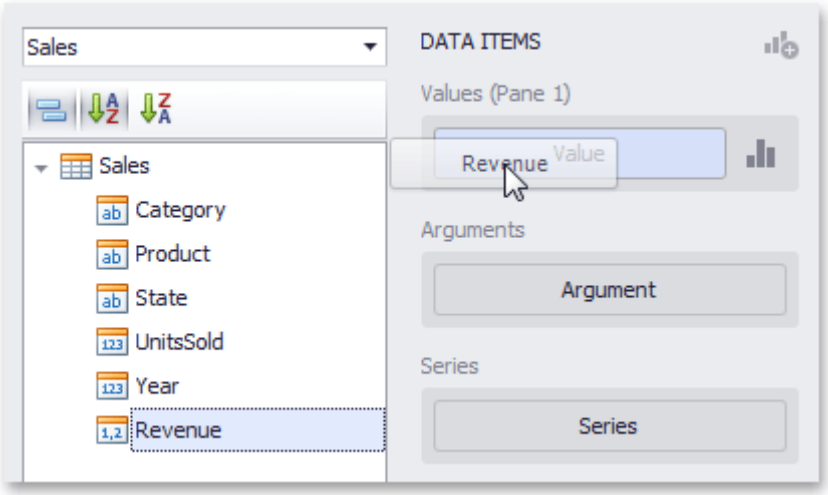
Specific data sections display Option s bu tton s for each data item container. Use these buttons to invoke a dialog that allows you to specify the settings of this data item container. These settings affect how a particular dashboard item's area/element displays the provided data.



Create Binding

The DATA ITEMS pane displays data sections of the selected dashboard item. It can be used to add, rearrange or remove data items.

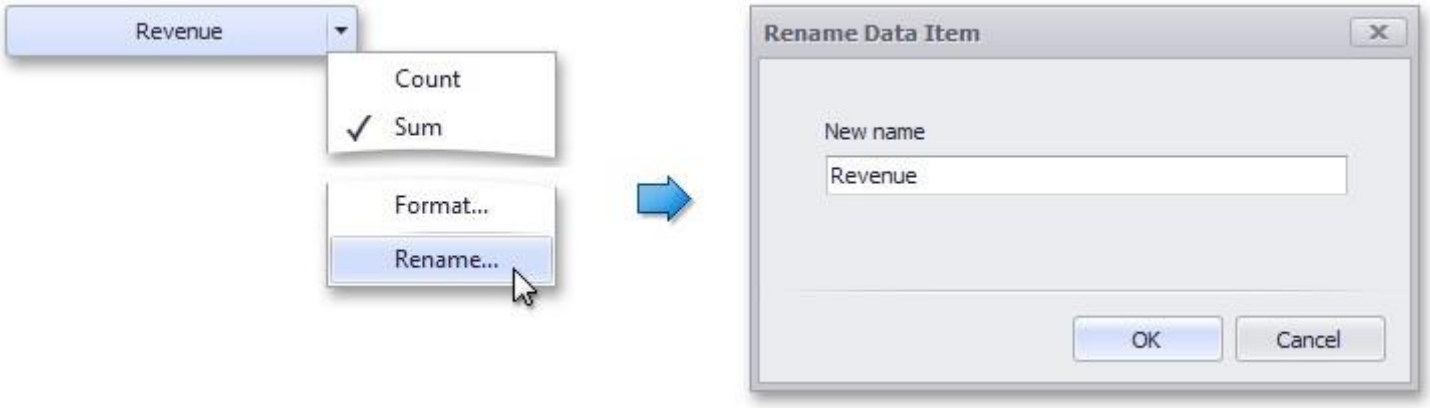
To bind a dashboard item to data, select the dashboard item. Then choose the required data field from the Data Source Browser and drop it onto the appropriate section in the DATA ITEMS pane.



You can remove the data item by dragging it outside the DATA ITEMS pane.

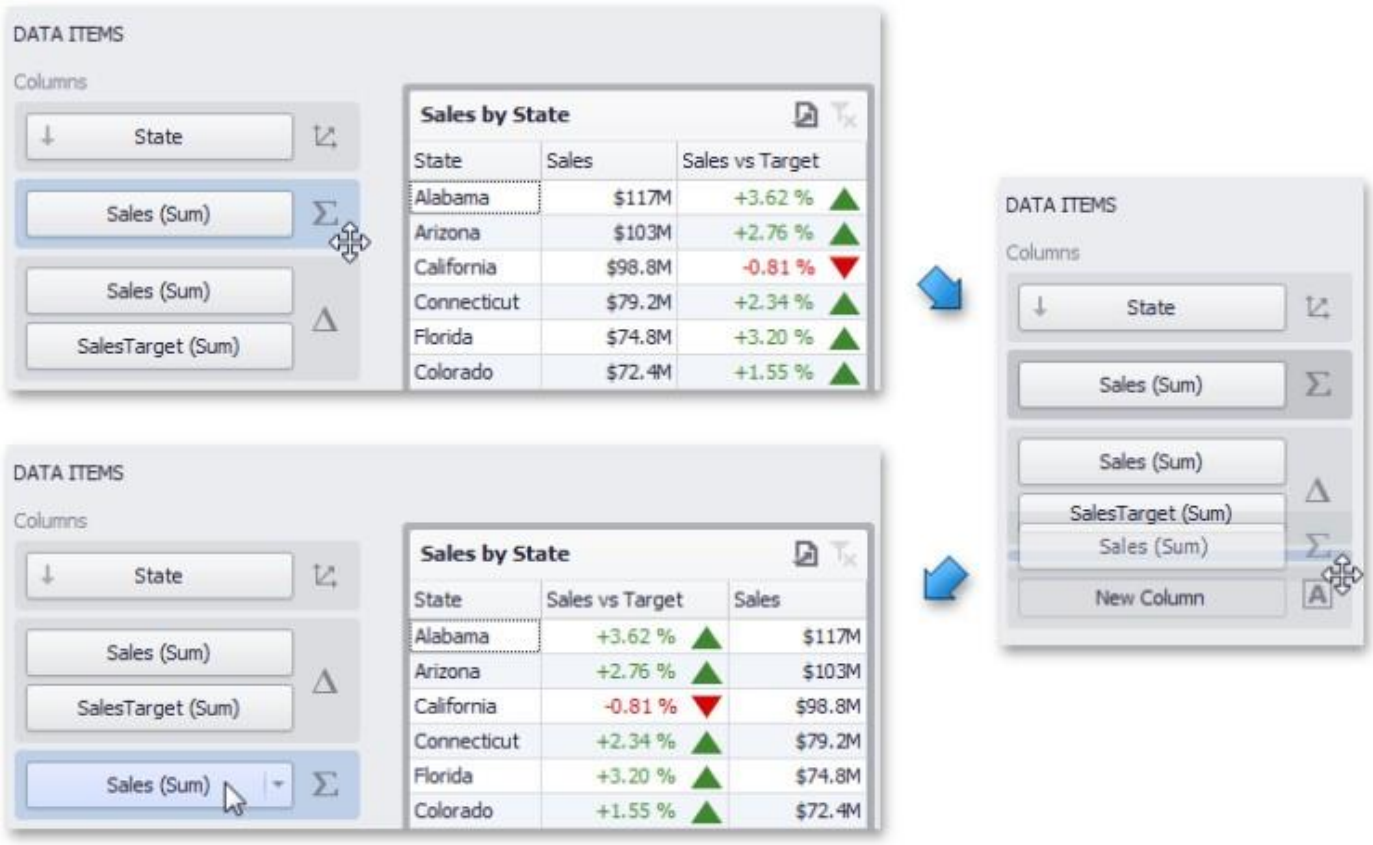
To learn how to bind a specific dashboard item to data, see the Providing Data topic for the required dashboard item.

To rename the data item, click its menu button and select Rename, to invoke the Rename Data Item dialog.



Modify Binding

You can modify data binding by dragging data item containers within a data section. To do this, drag the data item container to the required position.



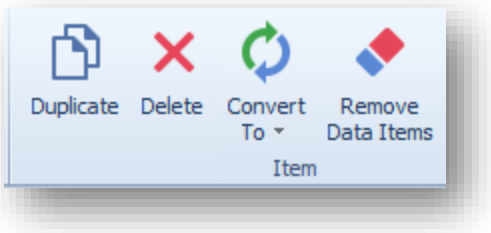
You can also modify data binding by dragging data items within the DATA ITEMS pane. This action has the following specifics.

If you drag the data item to a new position, the settings specified for the corresponding data item container will be restored to the default values.

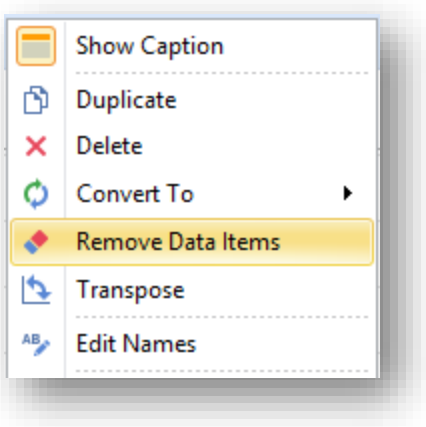
If you drag the data item to an existing data item placeholder, the settings of the corresponding data item container will be applied.

Clear Binding

To remove all data items for a selected dashboard item, use the Remove Data Items button in the Home ribbon tab.



You can also do this via the dashboard item's context menu.



Hidden Data Items

The HIDDEN DATA ITEMS area can be used to perform various data shaping and analysis operations by measures or dimensions that do not directly take part in the visual representation of data.

To create hidden data items, choose the required data field from the Data Source Browser and drop it onto the appropriate section in the HIDDEN DATA ITEMS area.

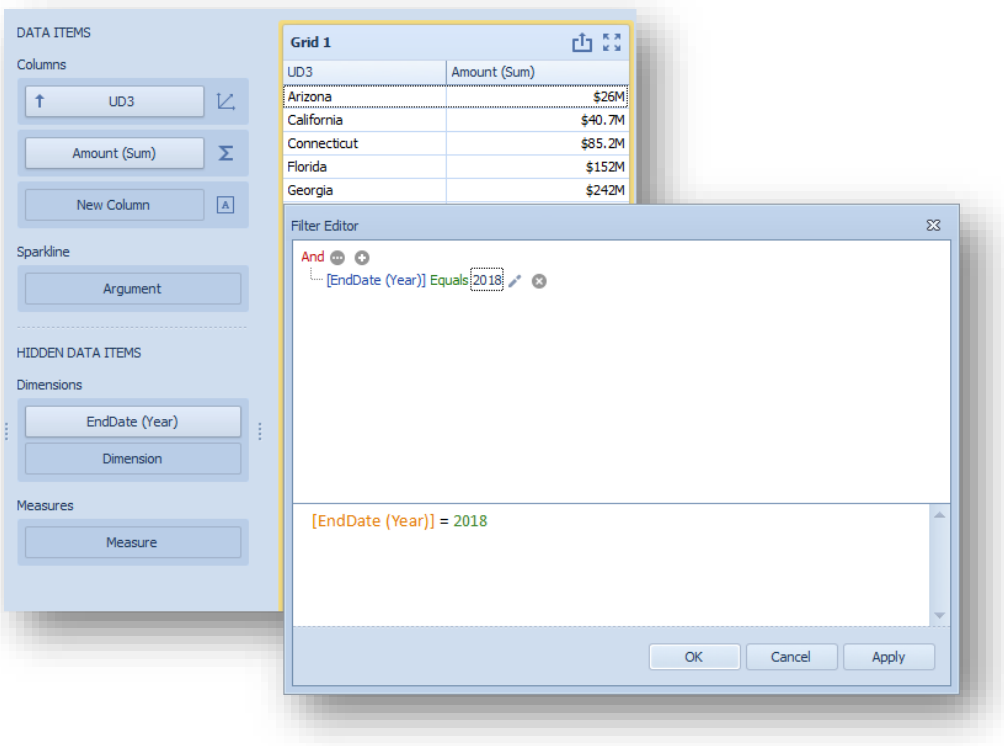
You can perform the following operations using hidden data items.

Filtering Sorting Top N

Conditional Formatting

Filtering

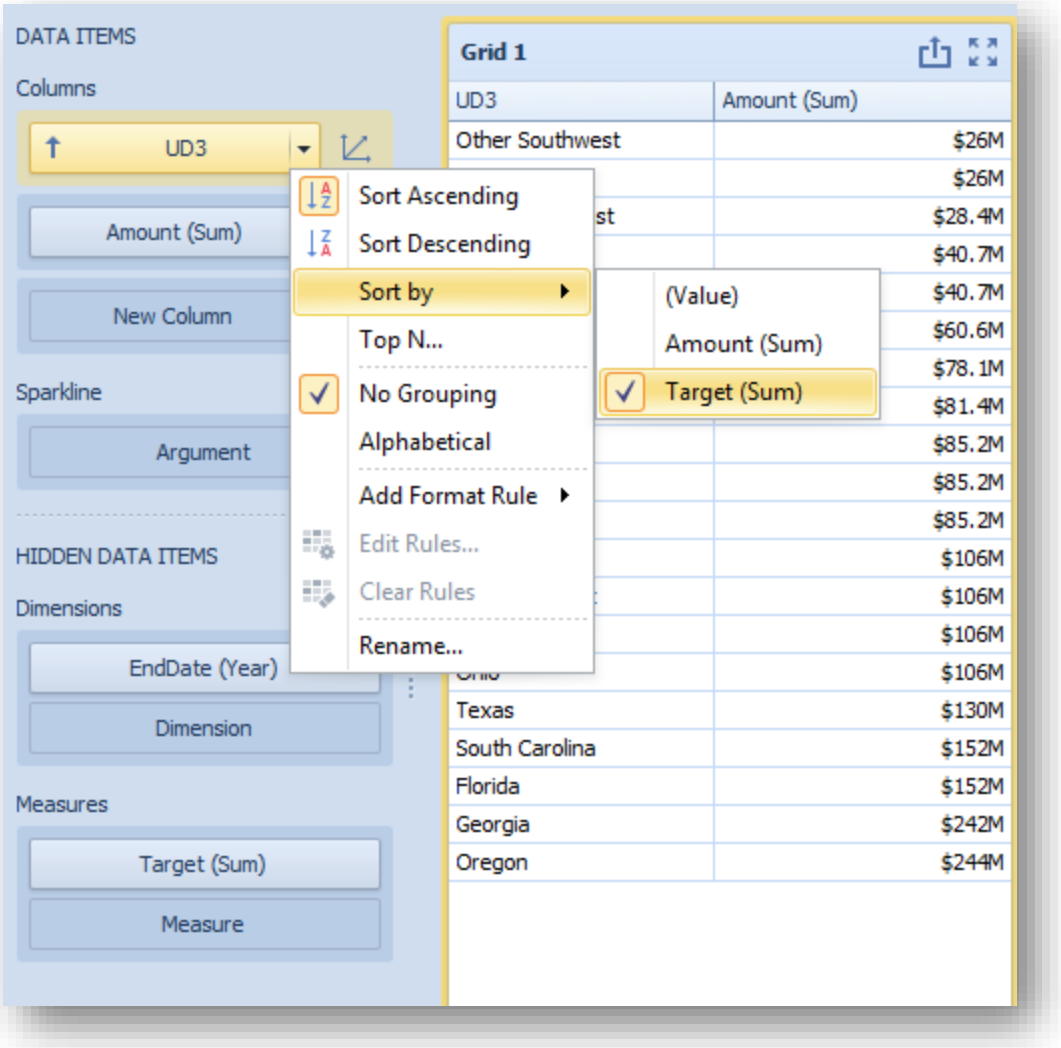
You can use hidden dimensions to apply filtering to the dashboard item. To do this, select the required hidden dimension in the Filter Editor dialog and specify the required condition.

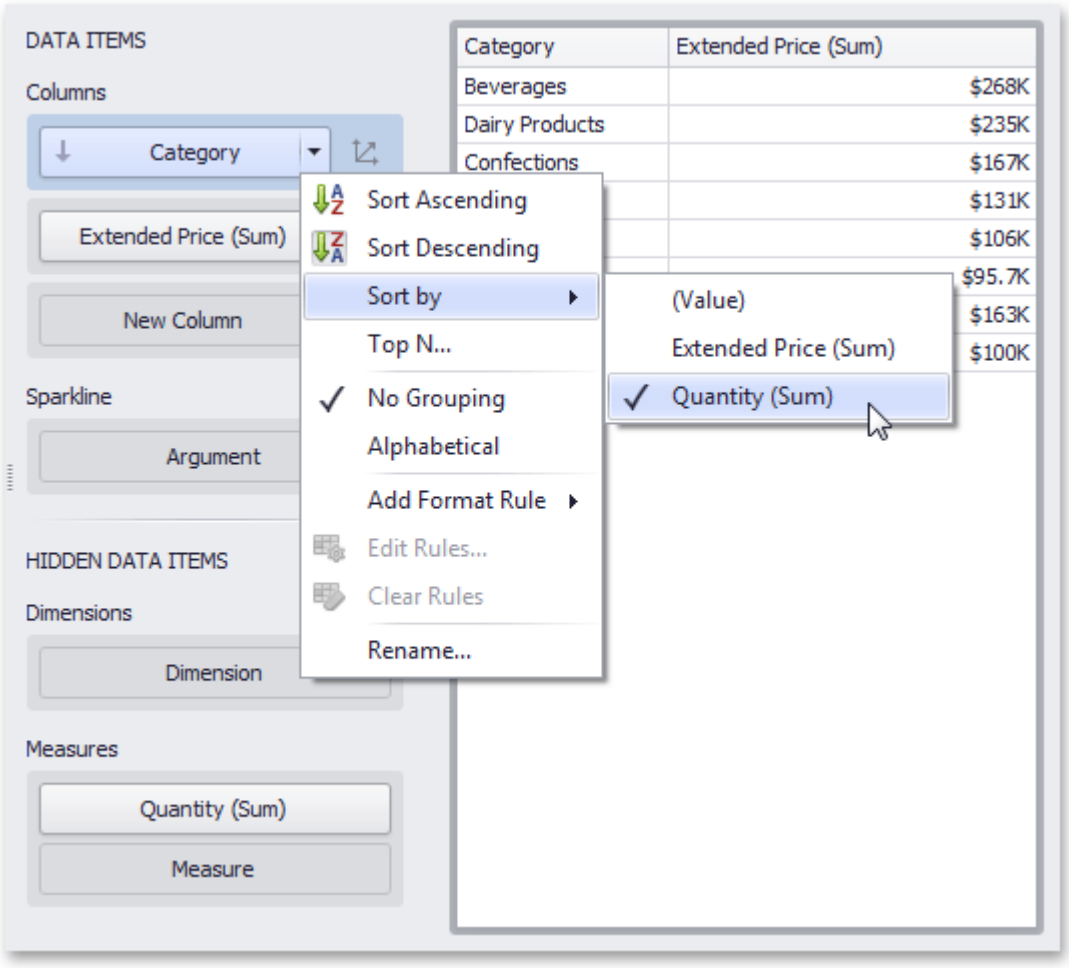


For instance, the Grid on the image above is filtered by the year of the EndDate(Year) dimension.

Sorting

You can sort values of the specified dimension by the hidden measure. To do this, select the required measure from the dimension's Sort By sub-menu.


DATA ITEMS
Columns
UD3
Amount (Sum)
New Column
Sparkline
Argument
HIDDEN DATA ITEMS
Dimensions
EndDate (Year)
Dimension
Measures
Target (Sum)
Measure
Sort Ascending
Sort Descending
Sort by
Top N...
No Grouping
Alphabetical
Add Format Rule
Edit Rules...
Clear Rules
Rename...
(Value)
Amount (Sum)
Target (Sum)
Grid 1
UD3
Amount (Sum)
Other Southwest $26M
$26M
$28.4M
$40.7M
$40.7M
$60.6M
$78.1M
$81.4M
$85.2M
$85.2M
$85.2M
$106M
$106M
$106M
$106M
Texas $130M
South Carolina $152M
Florida $152M
Georgia $242M
Oregon $244M

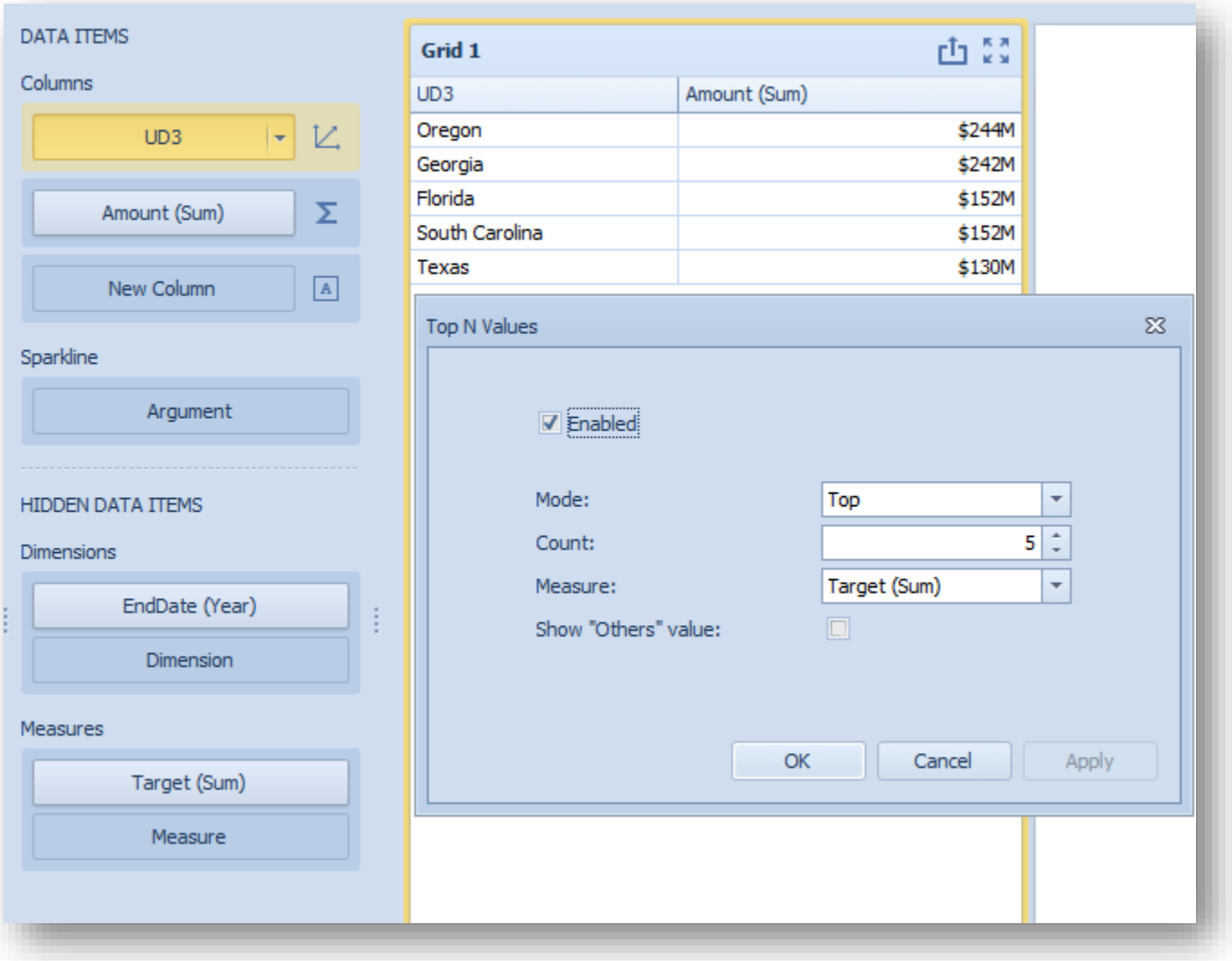


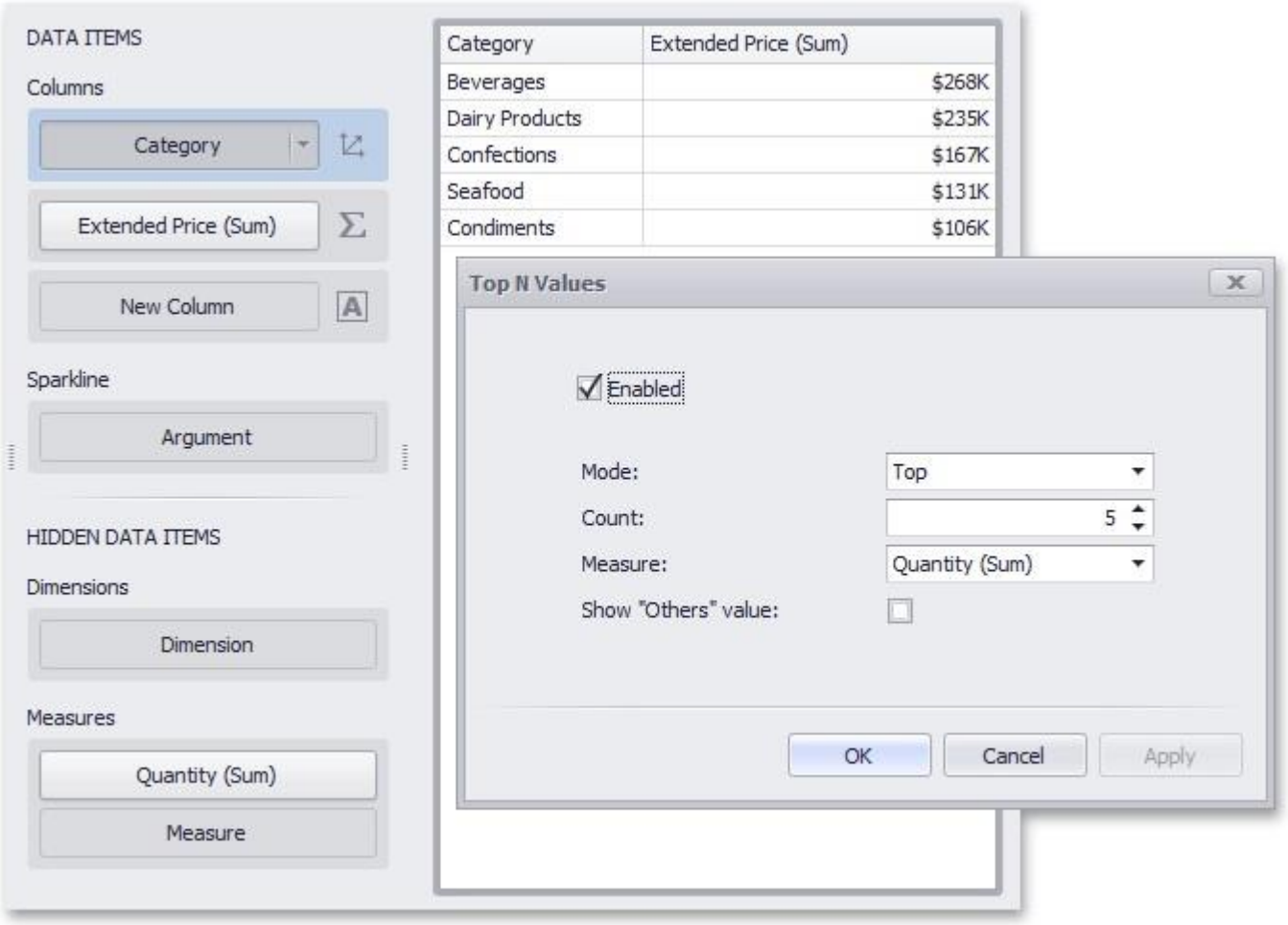
For instance, categories displayed in the Grid on the image above are sorted by values of the hidden Target (Sum) measure.

Top N

You can use hidden measures in Top N conditions. To do this, select the required measure from the Measure combo box in the Top N Values dialog.

For instance, the Grid on the image above displays top 5 categories for the Target (Sum) hidden measure.

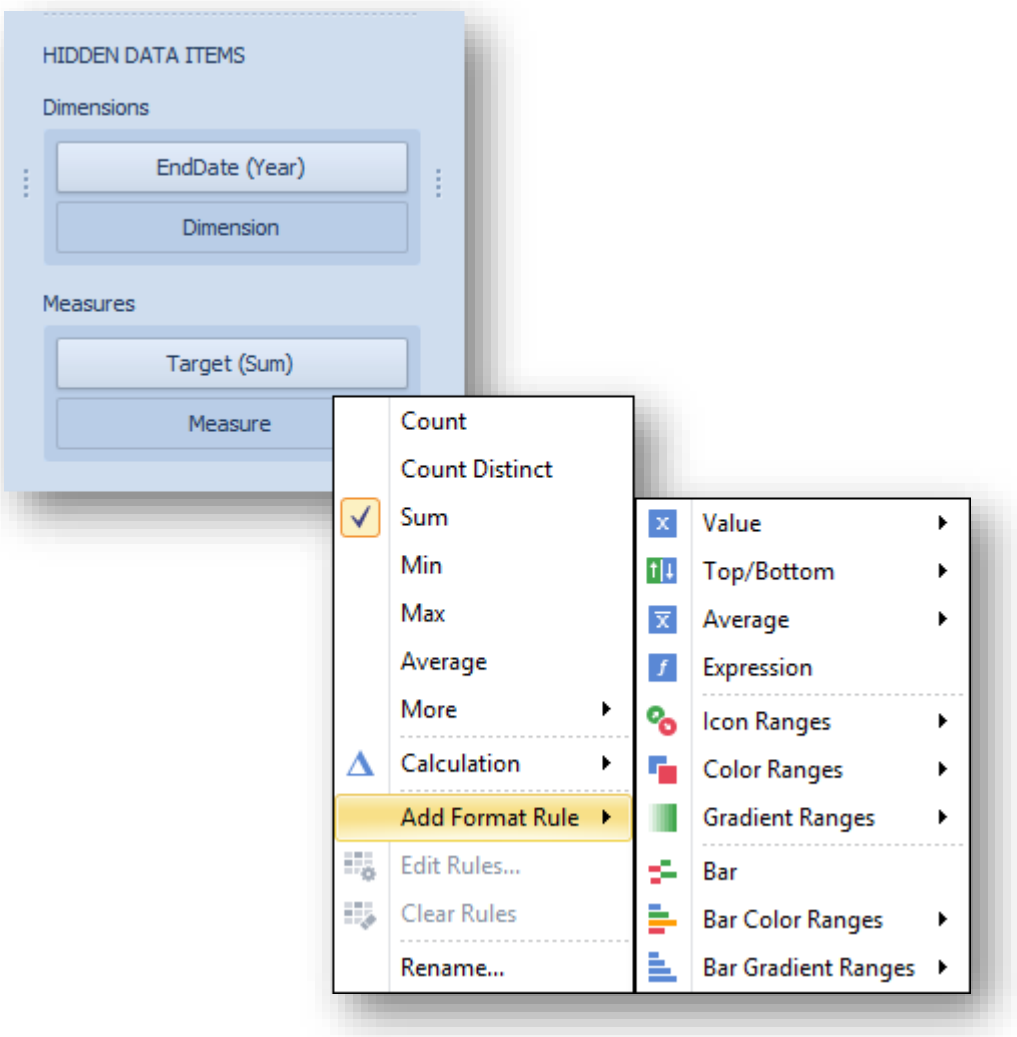




Conditional Formatting

You can create format rules based on hidden measures to apply conditional formatting to elements corresponding to visible values. To do this, use the Add Format Rule menu of the hidden measure.

For the Expression format condition, you can use the required hidden measure in the same manner as in the Filter Editor dialog.



See Also

Binding Dashboard Items to Data

Designing Dashboard Items

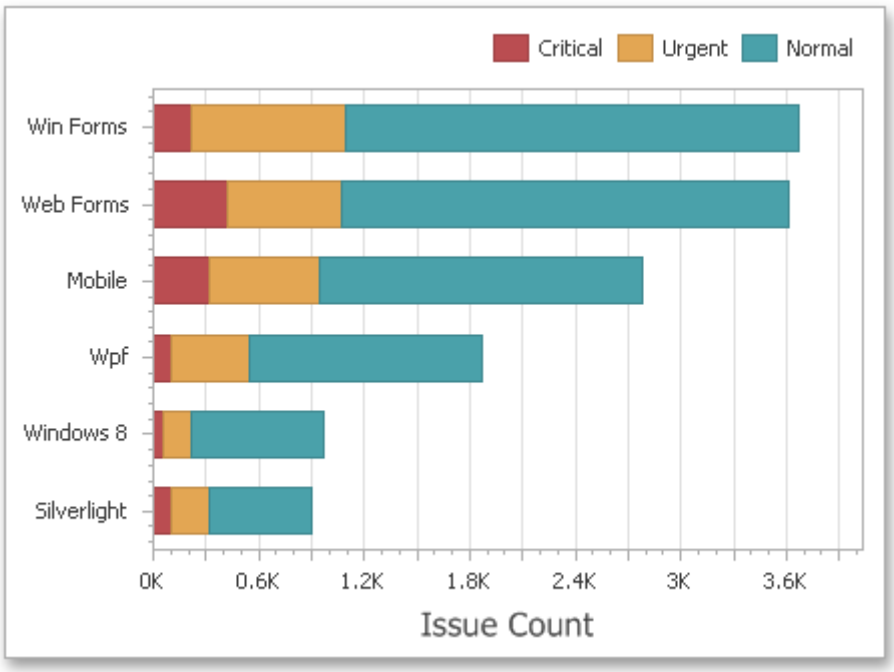
The BI Dashboard provides several visualization elements designed to present visual or textual information in a dashboard - dashboard items.

This section describes the available dashboard items.

- Chart
- Scatter Chart
- Grid
- Pies
- Cards
- Gauges
- Pivot
- Choropleth Map
- Geo Point Maps
- Range Filter
- Images
- Text Box
- Treemap
- Filter Elements
- Dashboard Item Group

Chart

The topics in this section describe the features available in the Chart dashboard item, and provide extensive information on how to create and customize charts in the Dashboard Designer.



This section is divided into the following subsections.

- Providing Data
  Provides information on how to supply the Chart dashboard item with data.
- Series
  Enumerates and describes different types of series that can be displayed within the Chart dashboard item.
- Panes
  Introduces the concept of chart panes (visual areas within a diagram that display chart series), and provides information on how to create them.
- Interactivity
  Describes features that enable interaction between the Chart and other dashboard items.
- Coloring
  Describes coloring capabilities of the Chart dashboard item.
- Axes
  Describes how to customize settings related to chart axes.
- Legend
  Provides information about the chart legend and its options.
- Orientation
  Describes how to toggle the chart's orientation.

Providing Data

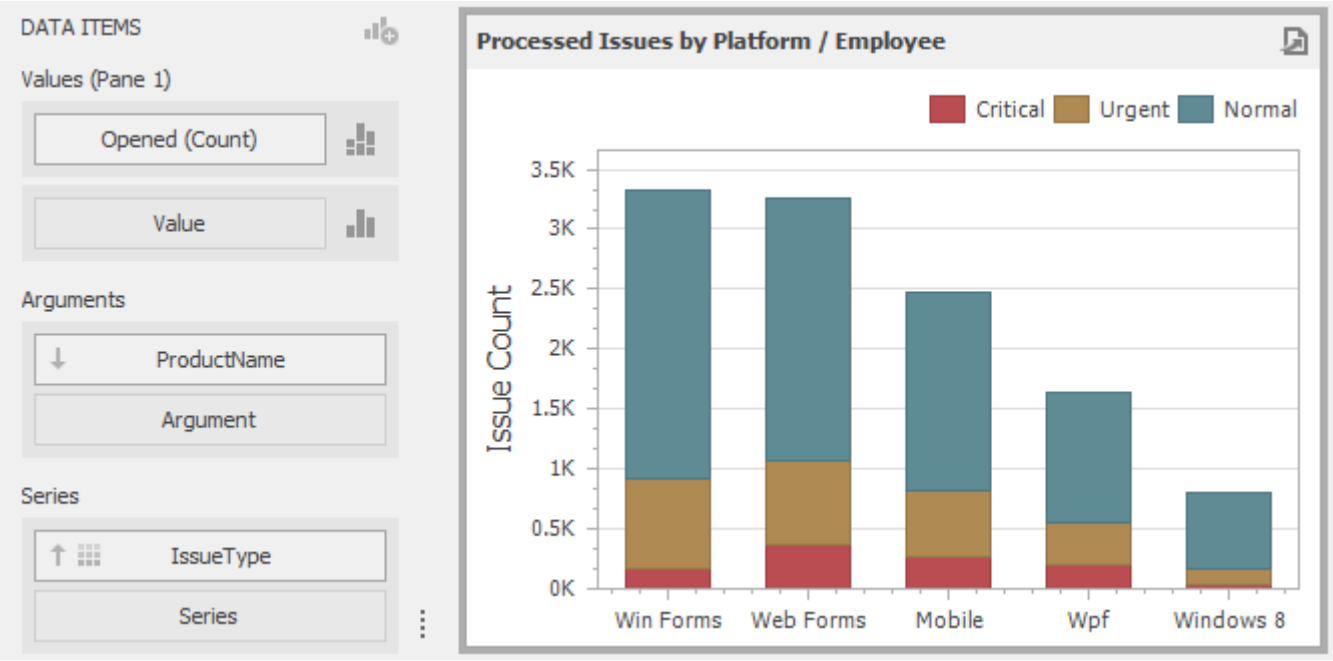
The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic.

The only difference is in the data sections that the required dashboard item has. This topic describes how to bind a Chart dashboard item to data in the Designer.

Binding to Data in the Designer Transposing Arguments and Series

Binding to Data in the Designer

The image below shows a sample Chart dashboard item that is bound to data.

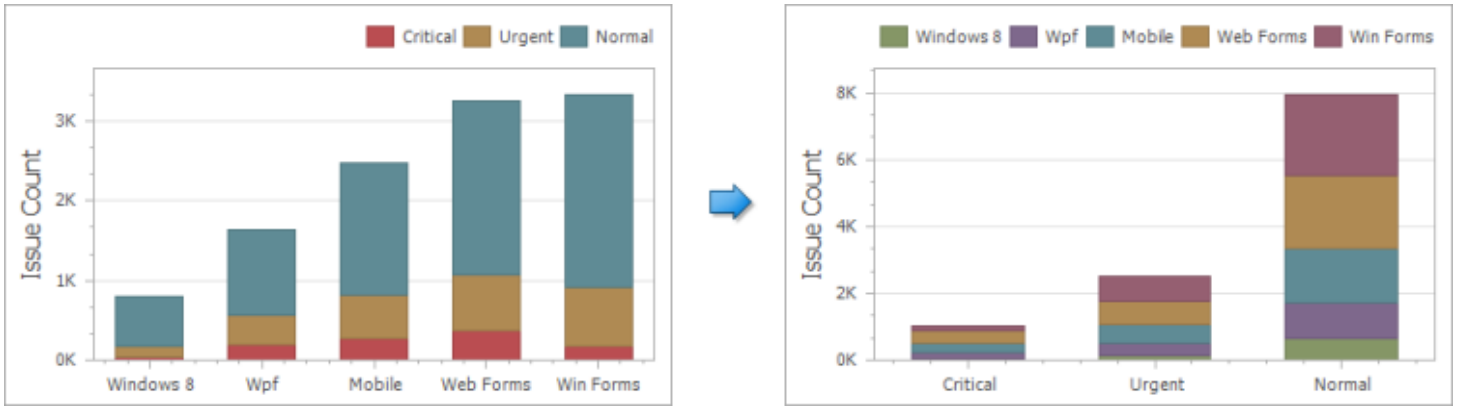


To bind the Chart dashboard item to data, drag and drop a data source field to a placeholder contained in one of the available data sections. The table below lists and describes the Chart's data sections.

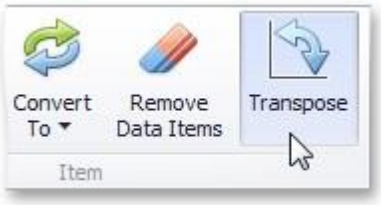
Section	Description
Values	Contains data items against which the Y-coordinates of data points are calculated. The Options button next to the **Value** data item allows you to select the series type and specify different options. Note that some types of series accept several measures. To learn more, see the documentation for the required series type.
Arguments	Contains data items that provide values displayed along the X-axis of the chart.
Series	Contains data items whose values are used to create chart series.

Transposing Arguments and Series

The Chart dashboard item provides the capability to transpose chart arguments and series. In this case, data items contained in the Arguments section are moved to the Series section, and vice versa.



To transpose the selected Chart dashboard item, use the Transpose button in the Home ribbon tab.



Series

This section describes how to select a desired series type in the overview topic, and lists the variety of available series types.

The section consists of the following topics.

Series Overview

Provides information on how to specify a series type in the Dashboard Designer.

Bar Series

Lists the available types of bar series.

Point and Line Series

Lists the available types of point and line series.

Area Series

Lists the available types of area series.

Range Series

Lists the available types of range series.

Weighted Series

Lists the available types of weighted series.

Financial Series

Lists the available types of financial series.

Series Overview

The Chart dashboard item supports a variety of series types - from simple bar and line charts to complex candle stick and bubble graphs.

Bar Series

Point and Line Series Area Series

Range Series

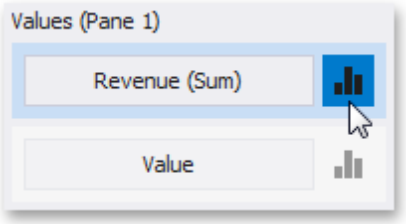
Weighted Series Financial Series

This topic describes how to change the series type and specify various series options (for instance, how to use secondary axis or enable point labels).

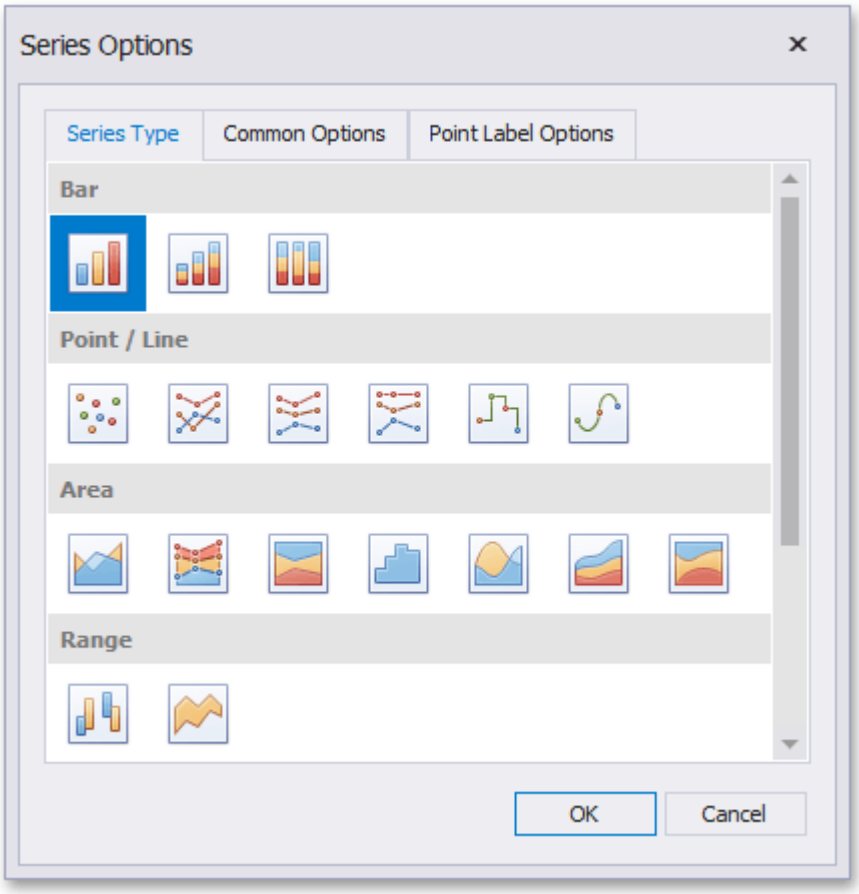
- Series Types
- Series Options
- Series Point
- Labels

Series Types

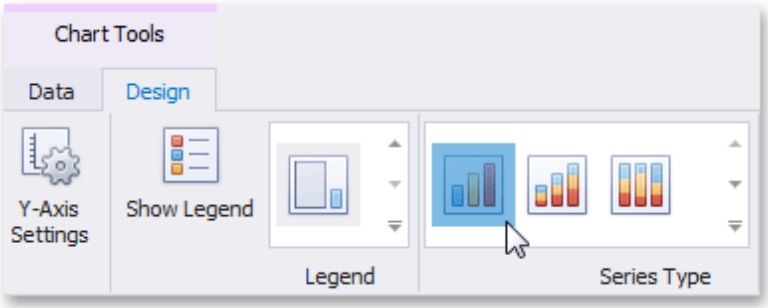
To switch between series types in the Dashboard Designer, click the Options button next to the required data item (or placeholder) in the Values section.



In the invoked Series Options dialog, select the required series type and click OK

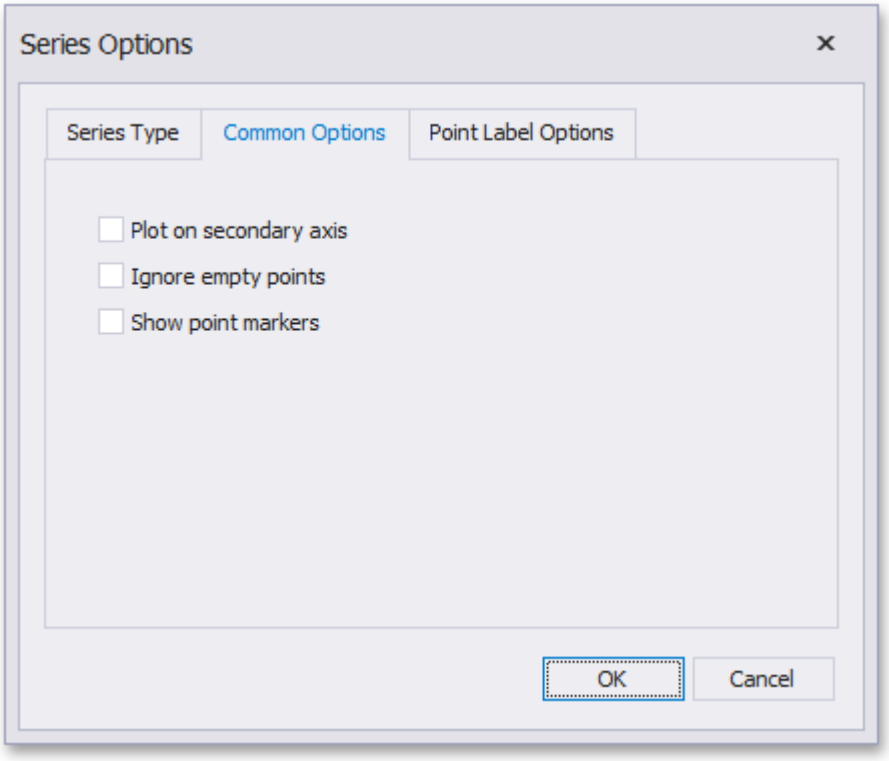


You can also do this using the Series Type gallery in the Design Ribbon tab.



Series Options

To manage common series options, use the Common Options tab of the Series Options dialog.



Plot on secondary axis - Specifies whether or not the secondary axis is used to plot the current series.

Ignore empty points - Specifies whether or not empty points are ignored when plotting the current series.

Note that this option is in effect for the Line, Area and Range Area series.

Show point markers - Specifies whether or not to show point markers for the current series.

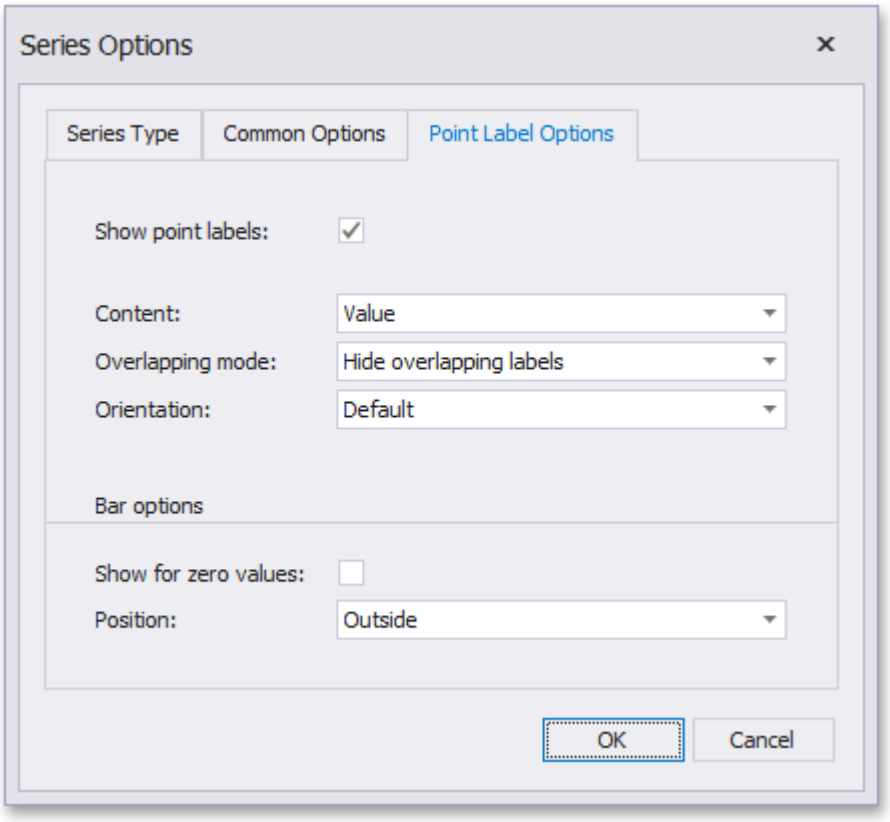
Note

Note that point markers are always shown when Master Filtering is enabled for the Chart dashboard item.

Note that this option is in effect for the Line and Area series.

Series Point Labels

The Point Label Options tab of the Series Options dialog allows you to enable series point labels and manage their settings.



Show point labels - Specifies whether or not to show point labels for the current series.

Content - Specifies the type of content displayed within point labels.

Overlapping mode - Specifies the label overlap mode.

Note

This option is not in effect when the dashboard is displayed in the Web Viewer.

Orientation - Specifies the orientation of point labels.

Bar options

Note

These settings are in effect for Bar series only.

Show for zero values - Specifies whether or not to show labels for points with zero values.

Position - Specifies the position of point labels relative to bars.

Bar Series

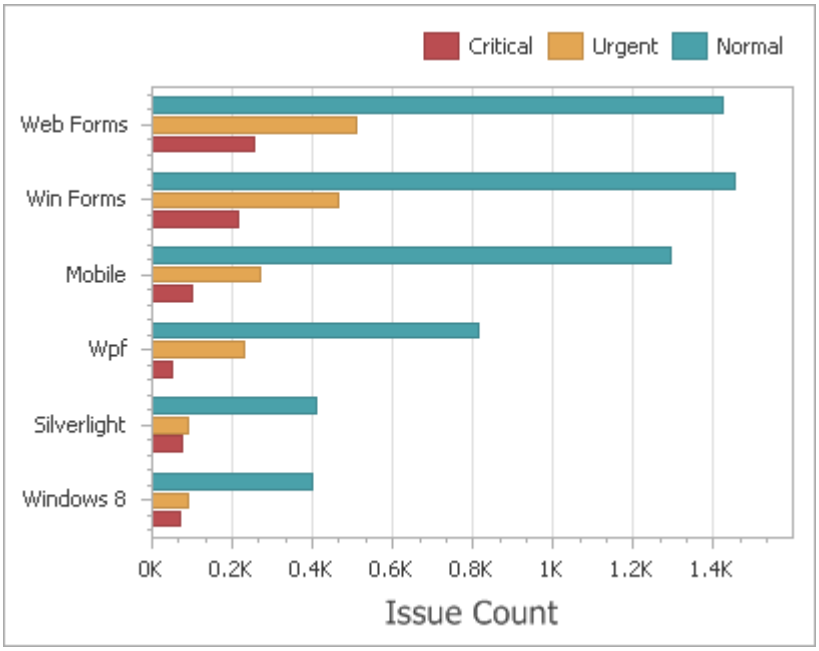
Bar series visualize data using rectangular bars with lengths proportional to the values that they represent.

The following types of Bar series are available.

- Bar Stacked Bar
- Full-Stacked Bar

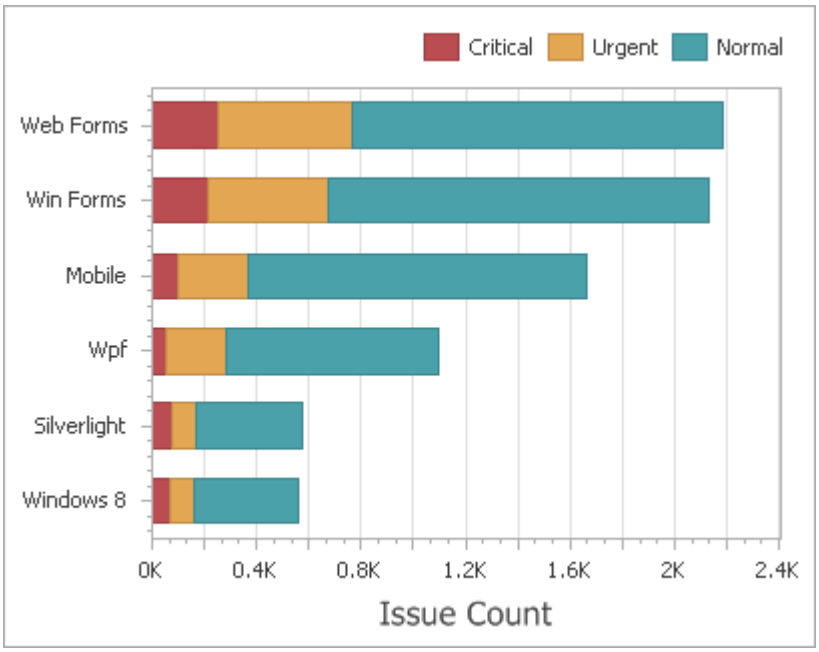
Bar

Bar series can be used to compare values across categories.



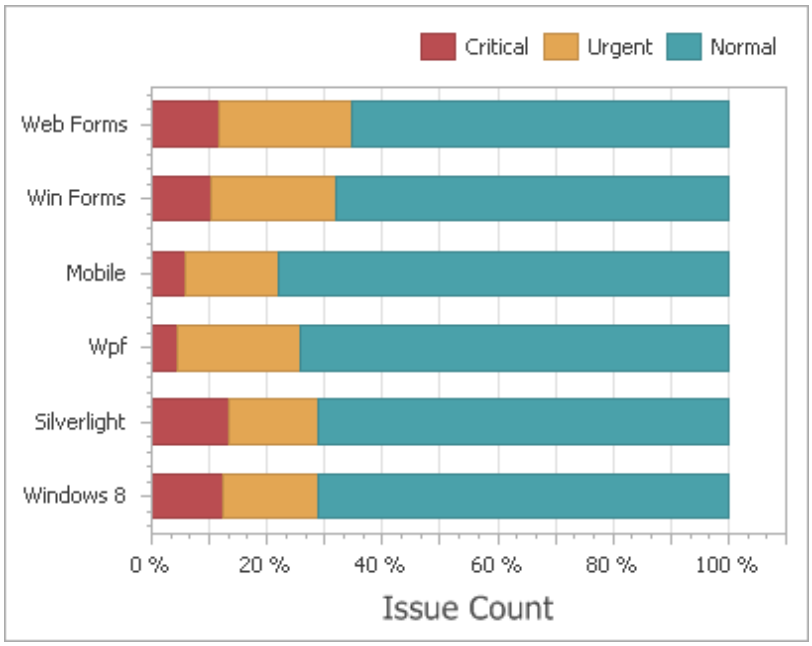
Stacked Bar

Stacked Bar series show the contribution of individual categories to the whole.



Full-Stacked Bar

Full-Stacked Bar series allow you to compare the percentage that each value contributes to a total across categories.



Point and Line Series

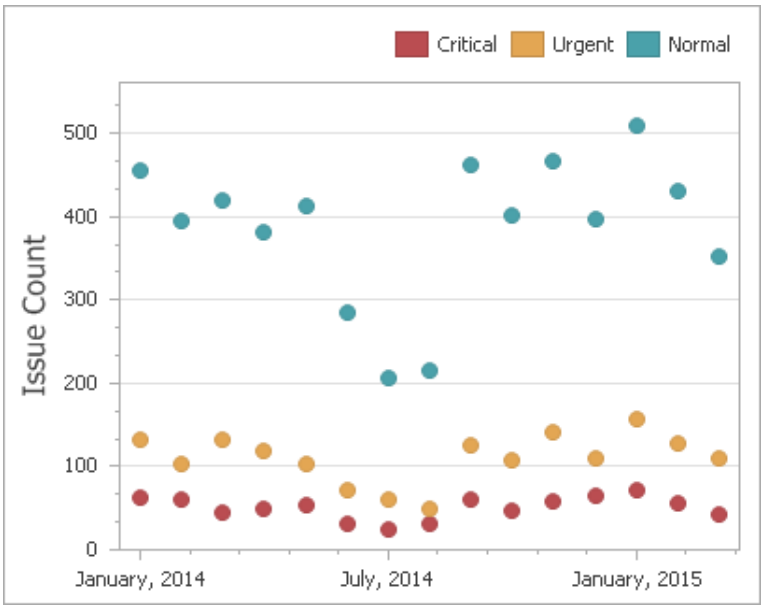
Point series visualize data as a set of individual numeric data points. Line series are used to connect numeric data points by different types of line segments.

The following types of Point and Line series are available.

- Point Line
- Stacked Line
- Full-Stacked Line Step Line
- Spline

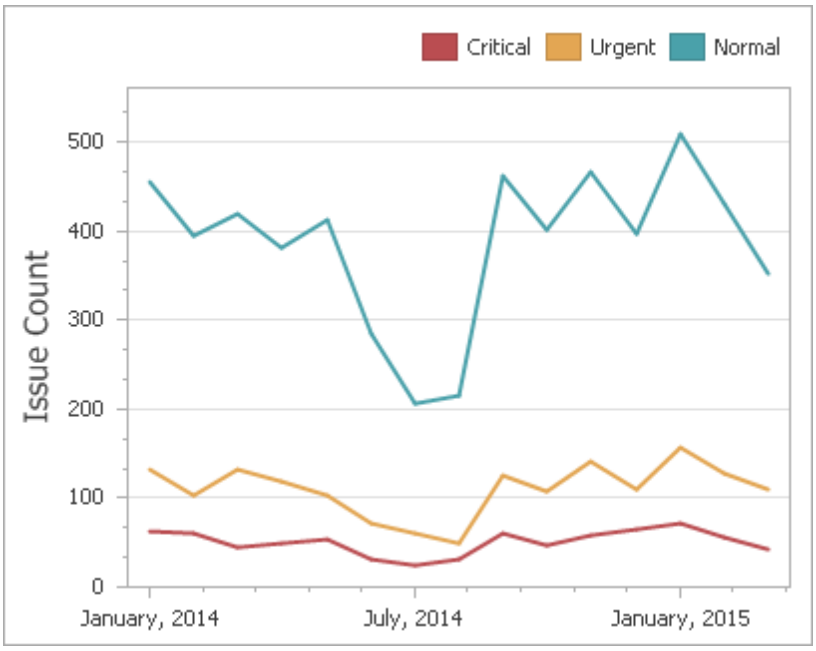
Point

Point series visualize data as a set of individual numeric data points.



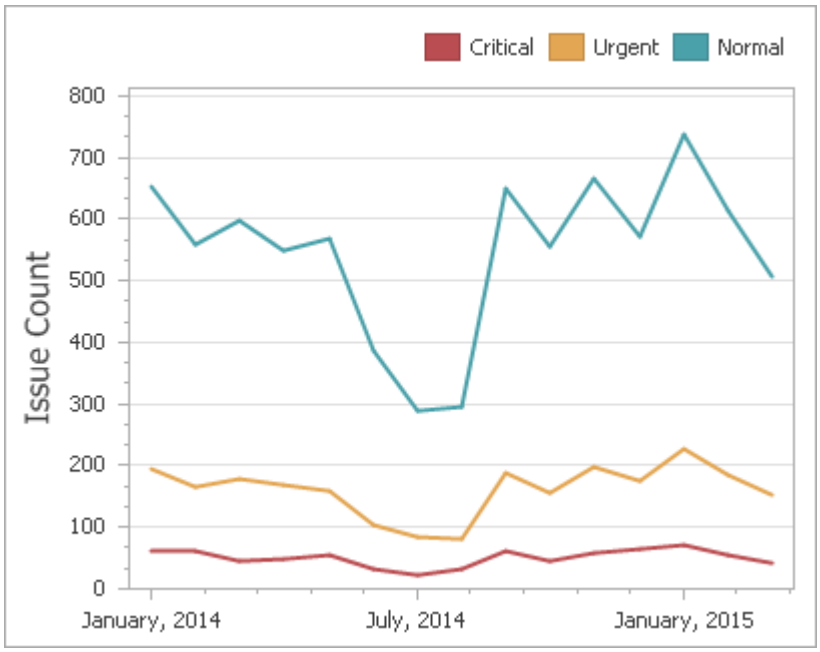
Line

Line series connect numeric data points by straight line segments.



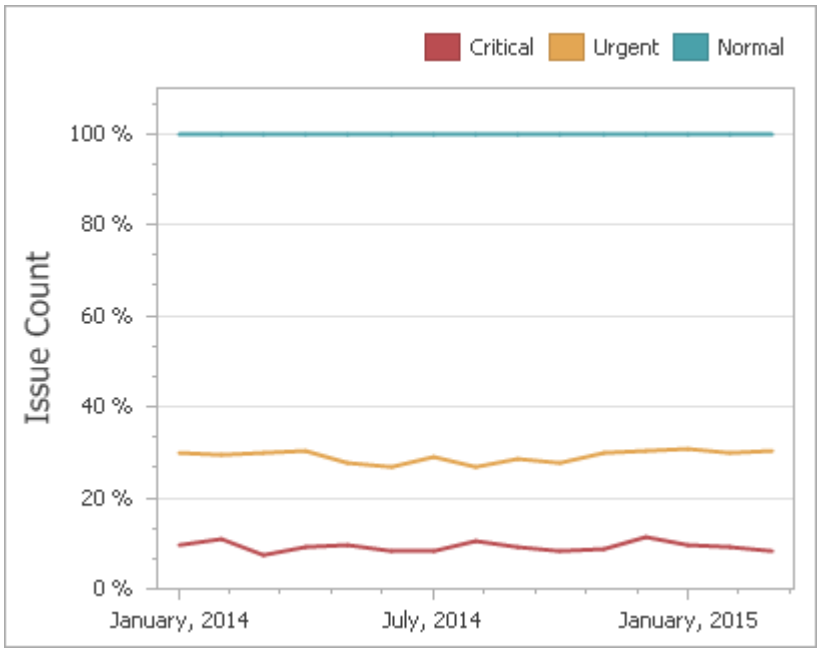
Stacked Line

Stacked Line series can be used to show the trend of the contribution for each value.



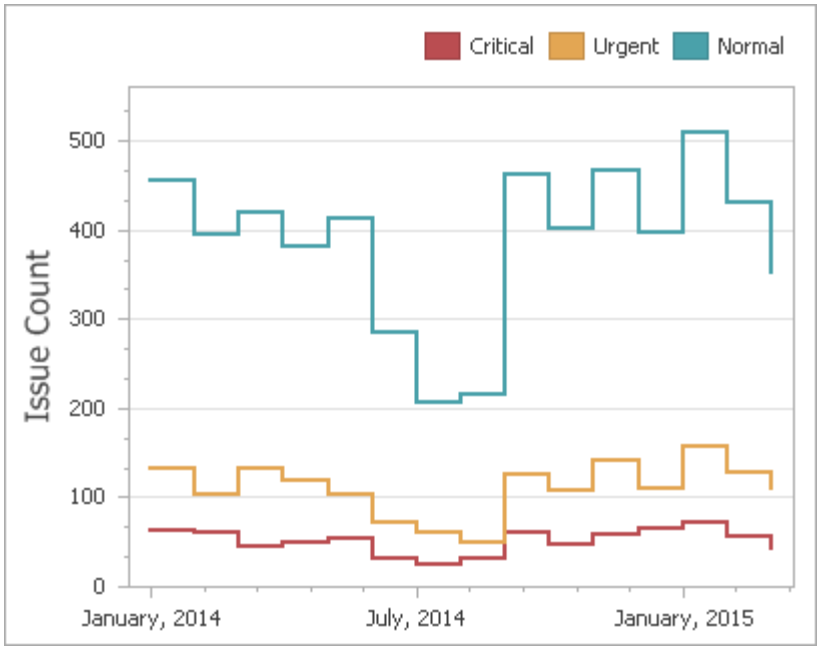
Full-Stacked Line

Stacked Line series are useful for showing the trend of the percentage for each value



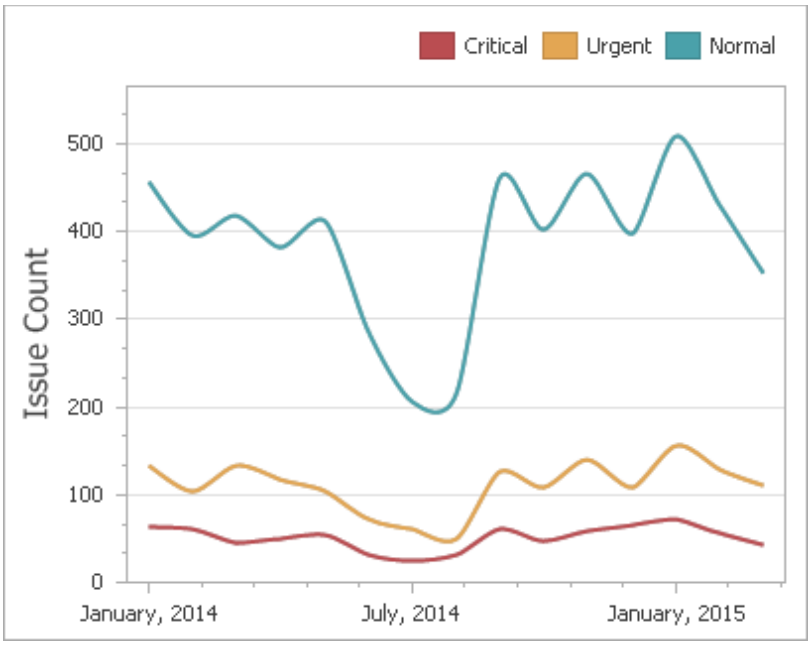
Step Line

Step Line series use vertical and horizontal lines to connect the numeric data points forming a step-like progression.



Spline

Spline series plot a fitted curve through each numeric data point.



Area Series

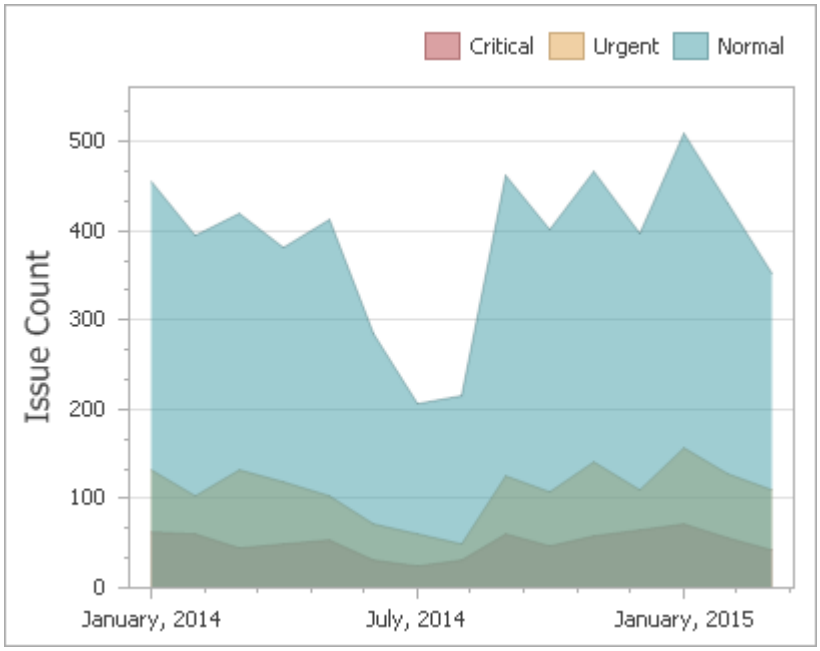
Area series connect numeric data points by different types of line segments and fill the area between the line and X-axis/other series.

The following types of Point and Line series are available.

- Area
- Stacked Area
- Full-Stacked Area
- Step Area
- Spline
- Area Stacked
- Spline Area
- Full-Stacked Spline Area

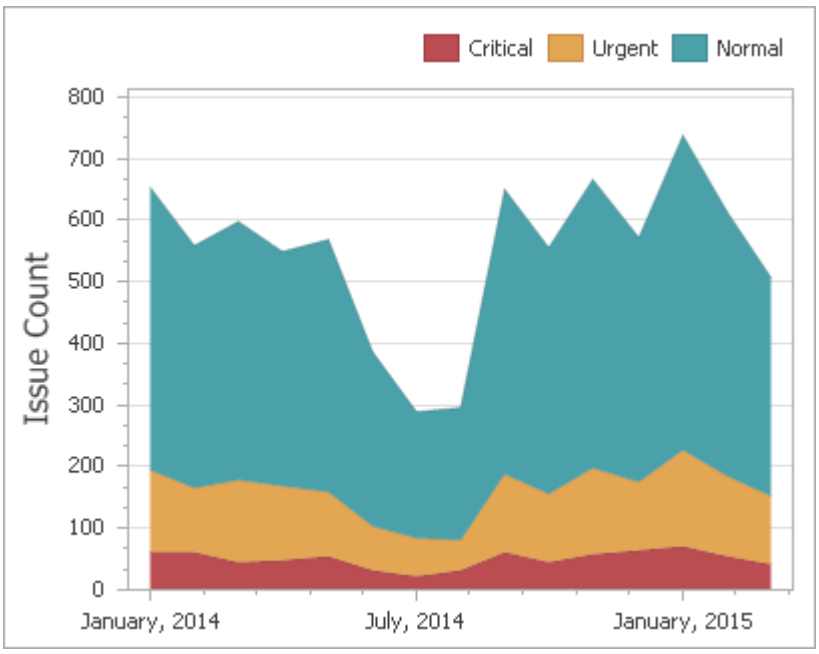
Area

Area series connect numeric data points by straight line segments and fill the area between the line and X-axis.



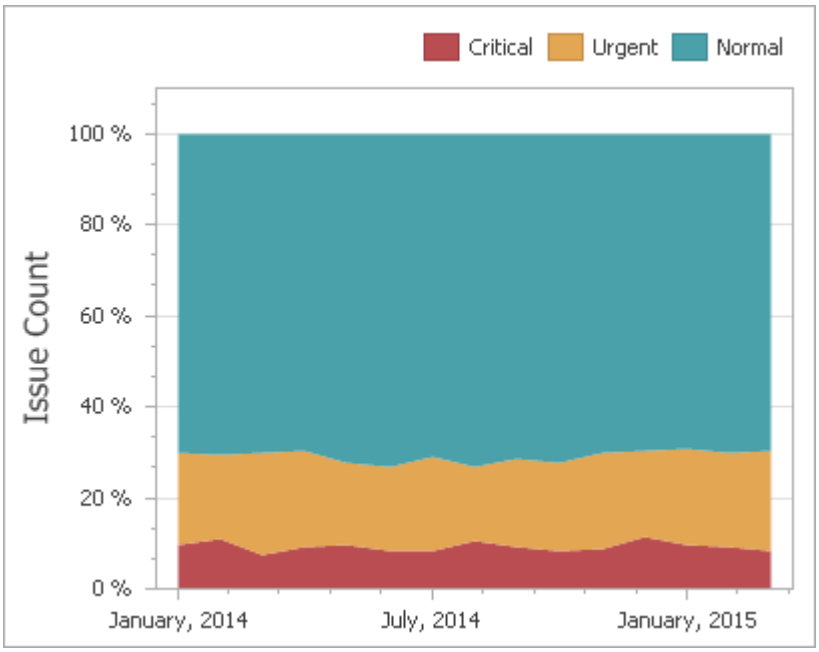
Stacked Area

Stacked Area series can be used to show the trend of the contribution for each value. Stacked Area series connect numeric data points by straight line segments and fill the area between the line and previous series.



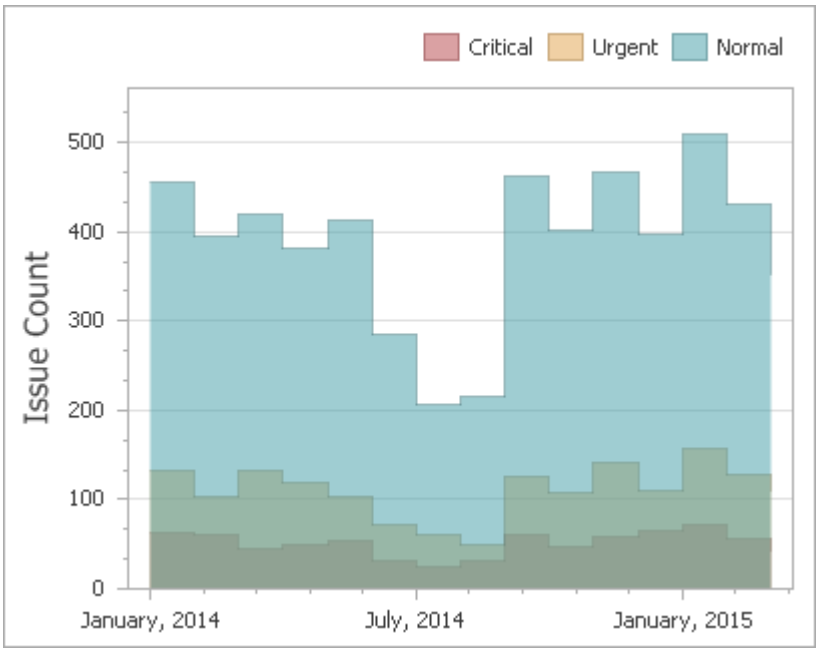
Full-Stacked Area

Full-Stacked Area series are useful to show the trend of the percentage for each value.



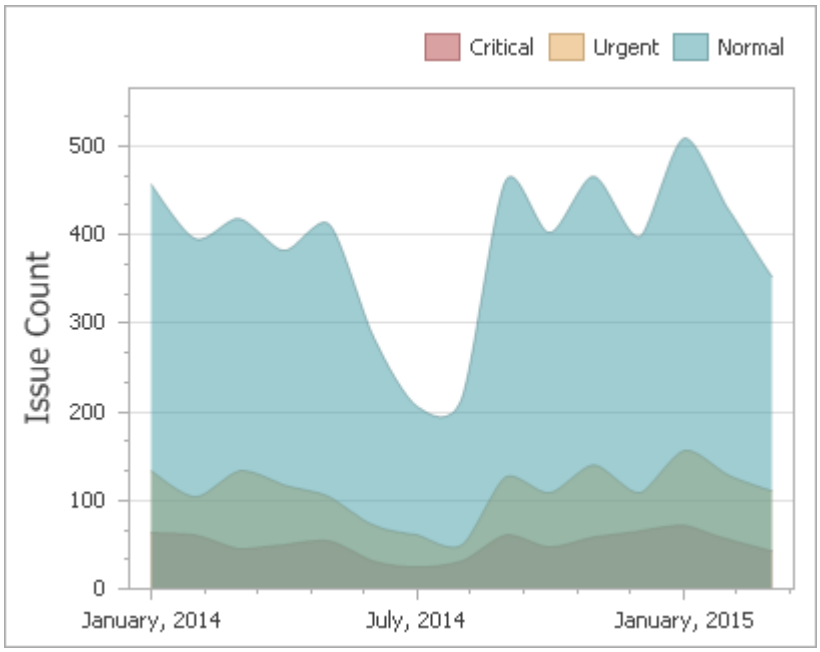
Step Area

Step Area series use vertical and horizontal lines to connect the numeric data points forming a step-like progression and fill the area between the line and X-axis



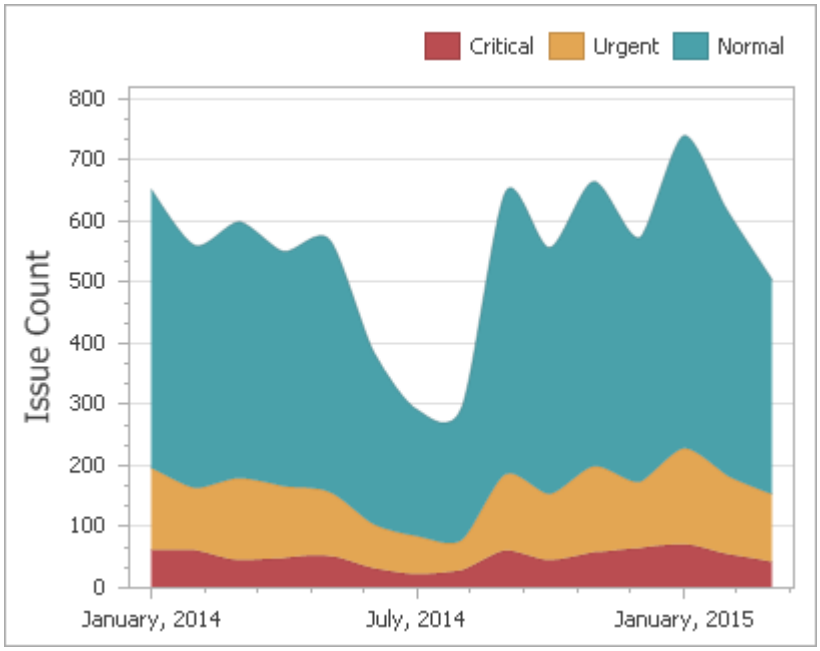
Spline Area

Spline Area series plot a fitted curve through each numeric data point and fill the area between the line and X- axis.



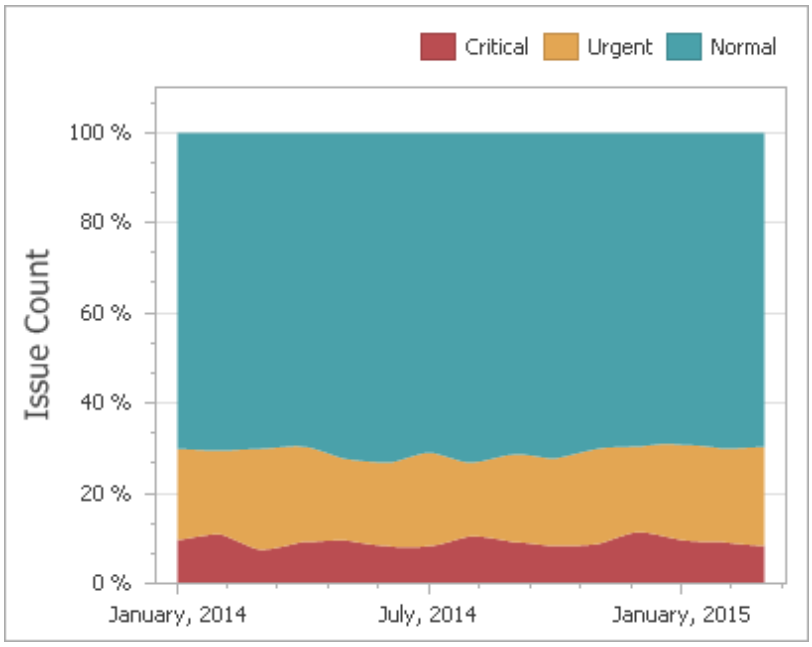
Stacked Spline Area

Stacked Area series can be used to show the trend of the contribution for each value. Stacked Area series plot a fitted curve through each numeric data point, and fill the area between the line and previous series.



Full-Stacked Spline Area

Full-Stacked Spline Area series are useful to show the trend of the percentage for each value.



Range Series

Range series are generally used to show variations in a specified time range like temperature, price, etc.

The following types of Range series are available.

- Range Bar
- Range Area

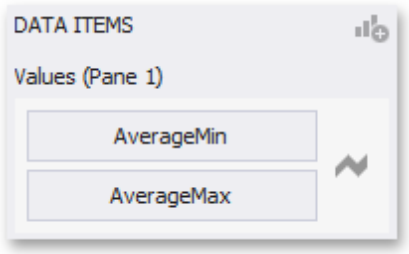
Data Binding Specifics

A range series is a space between two simple series displayed as a filled area (Range Area) or bars that stretch from a point in one series to the corresponding point in the other (Range Bar). Thus, you need to provide two measures instead of one to display a range series.

Value 1 - a measure against which the first set of values is calculated.

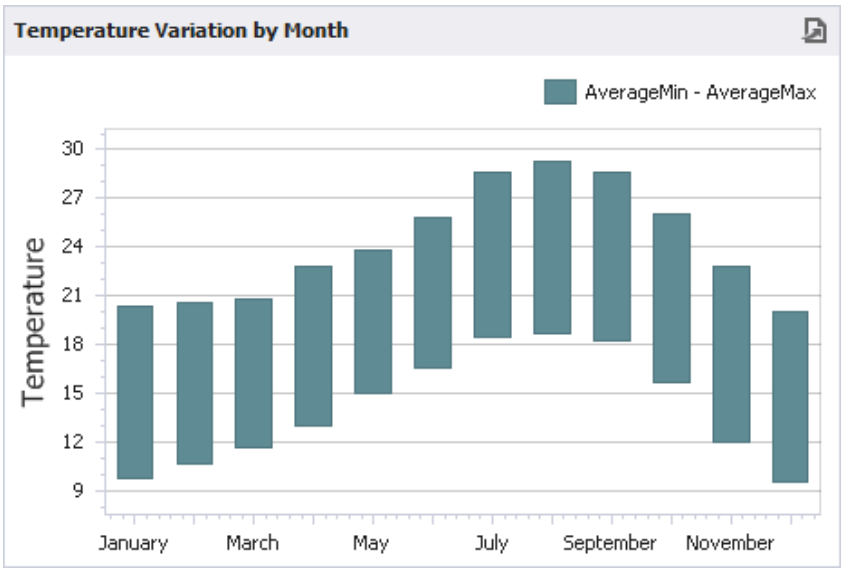
Value 2 - a measure against which the second set of values is calculated.

When you select the Range Bar or Range Area series type in the Designer, the DATA ITEMS area displays two data item placeholders. Drag and drop the required measures to corresponding placeholders.



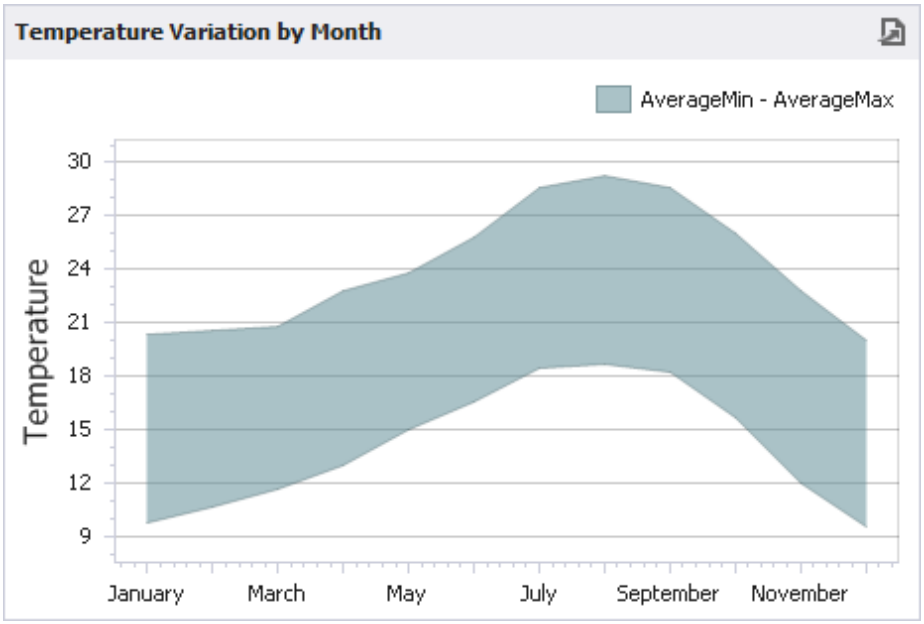
Range Bar

Range Bar series are similar to Bar series except that they are drawn between a range of values.



Range Area

Range Area series are similar to Area series except that their areas are filled between a range of values.



Weighted Series

Weighted series allow you to visualize data in three dimensions.

The following types of Weighted series are available.

Bubble

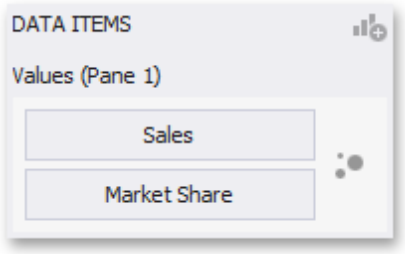
Data Binding Specifics

Data points in a weighted series present the following two measures.

Value - the Y-coordinate of series points.

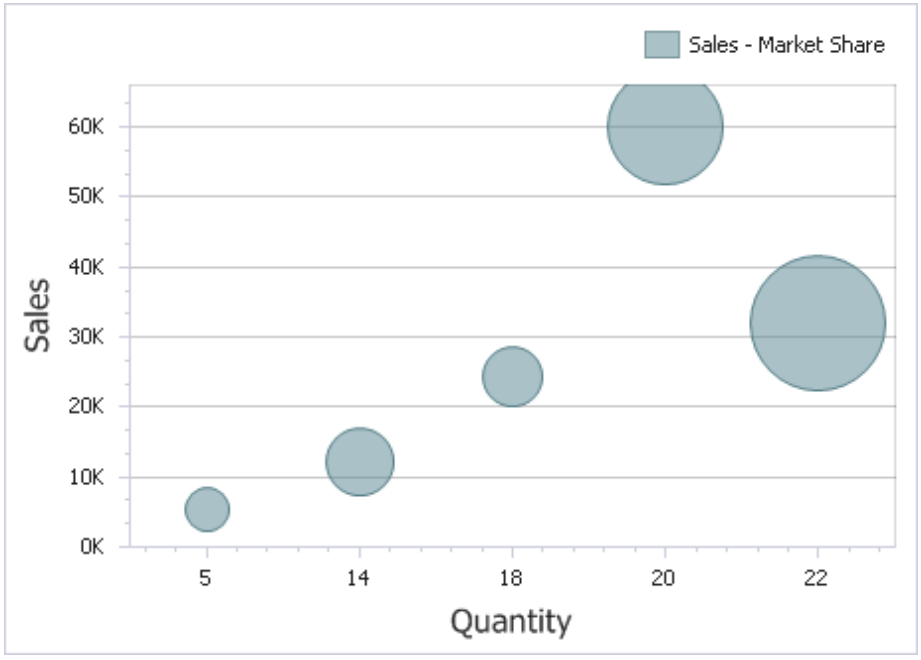
Weight - the size of series points.

When you select the Bubble series type in the Designer, the DATA ITEMS area displays two data item placeholders. Drag and drop the required measures to corresponding placeholders.



Bubble

Bubble series are similar to Point series except that they allow you to provide an additional measure whose values are expressed in a bubble size.



Financial Series

Financial series are used to illustrate stock prices.

The following types of Financial series are available.

- High-Low-Close Stock
- Candle Stick

Coloring Specifics

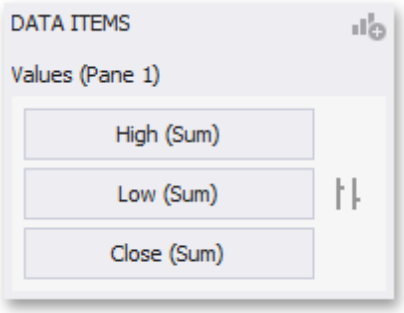
Note that financial series do not support a standard coloring mechanism used to color chart series points. The Chart dashboard item colors series points of financial series in the following way.

Black if the price at the end of the previous period is lower than the price at the end of the current period.

Red if the price at the end of the previous period is larger than the price at the end of the current period.

High-Low-Close

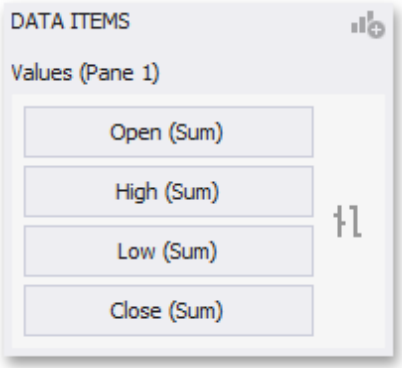
When you select the High-Low-Close series type in the Designer, the DATA ITEMS area displays three data item placeholders. High-Low-Close series require three measures to be provided.



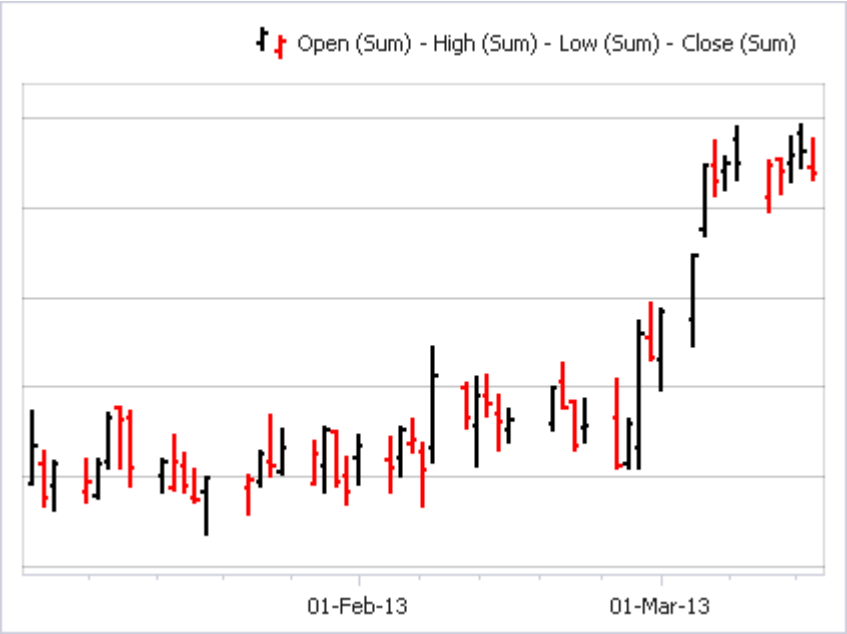
- **High** - the maximum price within the specified period (the top of the series point).
- **Low** - the minimum price within the specified period (the bottom of the series point). **Close** - the price at the end of the specified period (the tick mark).

Stock

When you select the Stock series type in the Designer, the DATA ITEMS area displays four data item placeholders. Stock series require four measures to be provided.

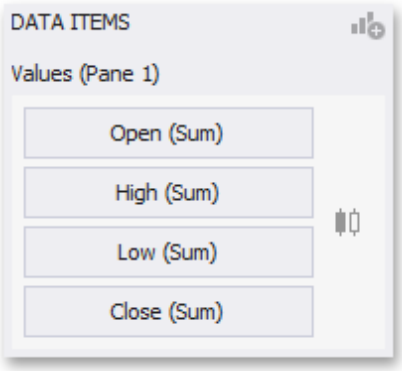


- **Open** - the price at the beginning of the specified period (the left tick mark).
- **High** - the maximum price within the specified period (the top of the series point).
- **Low** - the minimum price within the specified period (the bottom of the series
- point). **Close** - the price at the end of the specified period (the right tick mark).



Candle Stick

When you select the Candle Stick series type in the Designer, the DATA ITEMS area displays four data item placeholders. Candle Stick series require four measures to be provided.



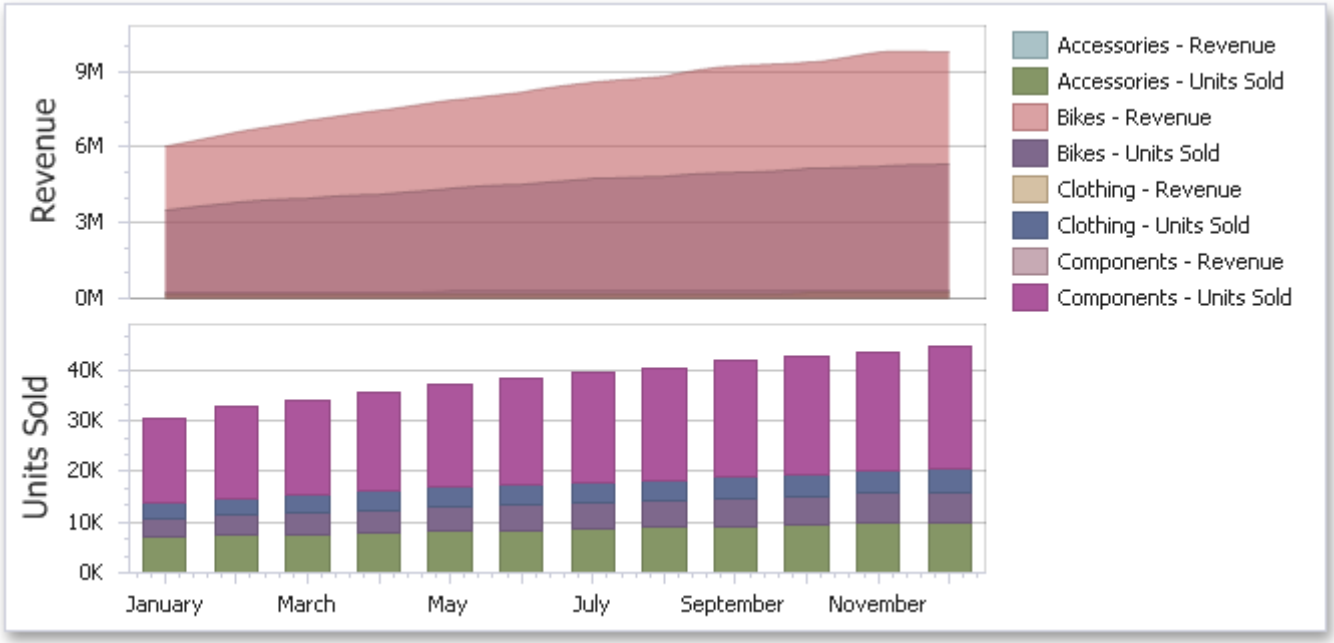
- **Open** - the price at the beginning of the specified period.
- **High** - the maximum price within the specified period (the upper shadow top).
- **Low** - the minimum price within the specified period (the lower shadow
- bottom). **Close** - the price at the end of the specified period.

Open (Sum) - High (Sum) - Low (Sum) - Close (Sum)
01-Feb-13
01-Mar-13

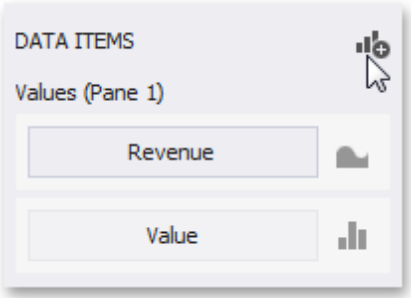
Panes

The Chart dashboard item can contain any number of panes. Panes are visual areas within a diagram that display chart series.

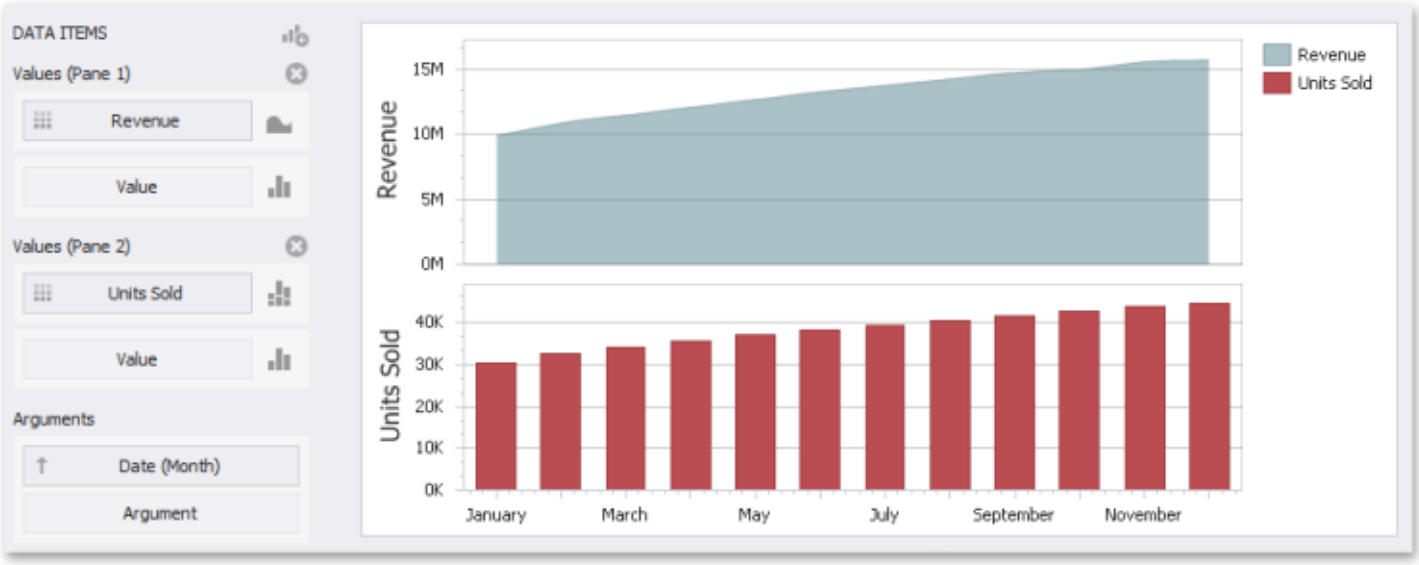
Each pane has its own Y-axis and displays a specific set of series. All panes in a chart share the same X-axis.



To add a pane, click the Add Pane button (the icon) at the top right of the DATA ITEMS pane.



Once a new pane is added, the Dashboard Designer creates another Values section in the DATA ITEMS pane.



Use this section to provide data items that supply values to be displayed in the new pane (see Providing Data for details on data binding).

To remove a pane, click the Remove Pane button (the icon) displayed in the corresponding Values section.

Interactivity

This section describes features that enable interaction between the Chart and other dashboard items. These features include Master Filtering and Drill-Down.

The section contains the following topics.

- Master Filtering
- Drill-Down

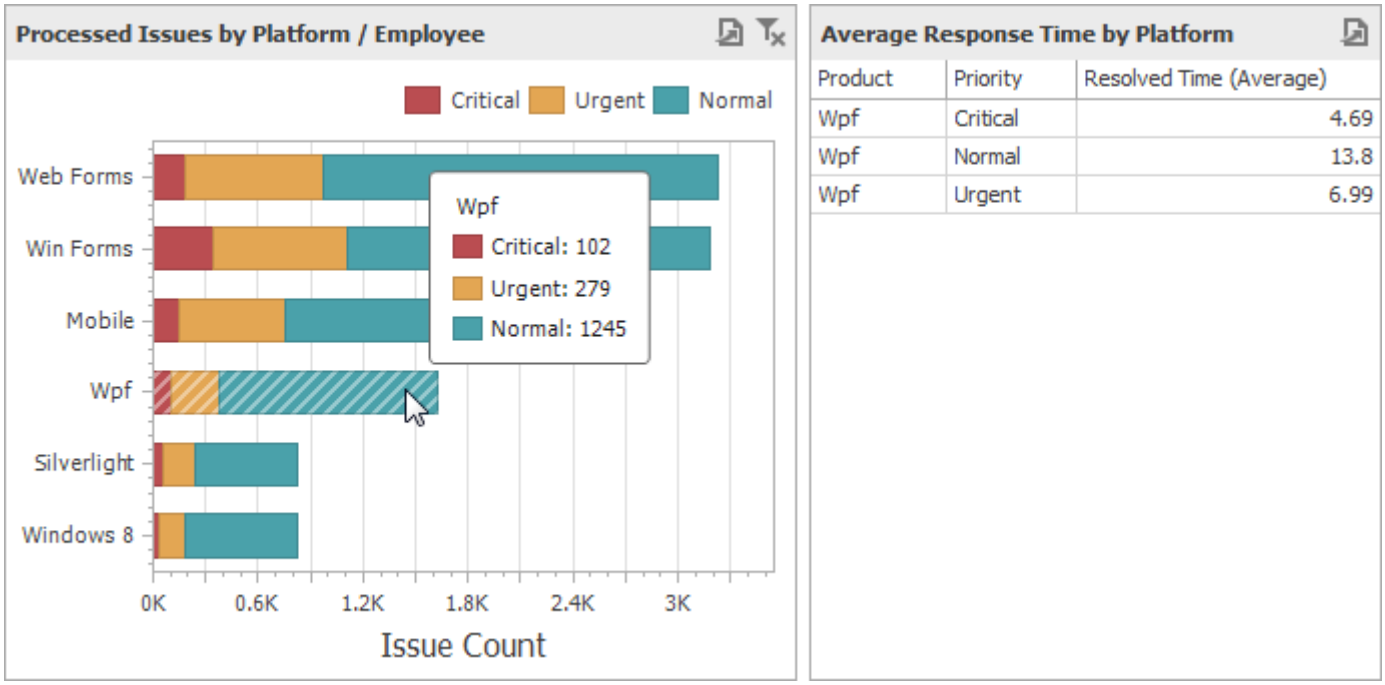
Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

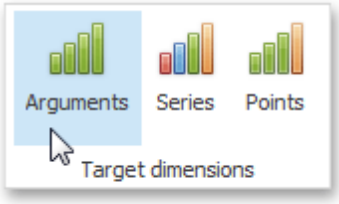
The Chart dashboard item supports filtering by argument, series or points.

Filtering by Arguments

When filtering by arguments is enabled, you can click series points to make other dashboard items only display data related to selected argument values.

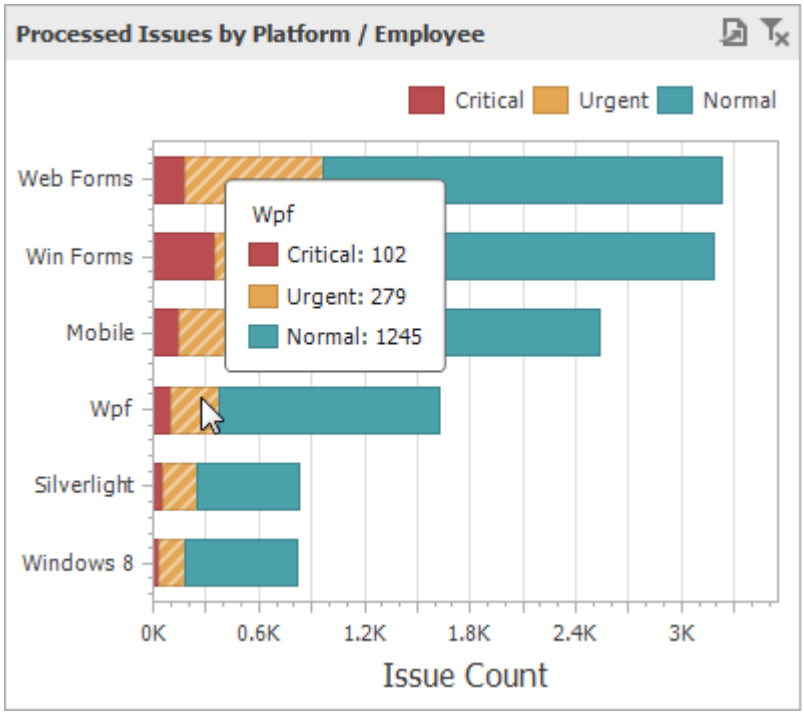


To enable filtering by arguments in the Designer, set the required Master Filter mode and click the Arguments button in the Data Ribbon tab (or the button if you are using the toolbar menu).



Filtering by Series

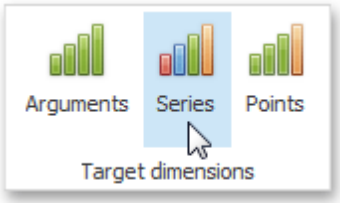
When filtering by series is enabled, you can click a series point to make other dashboard items only display data related to the selected series.



Average Response Time by Platform

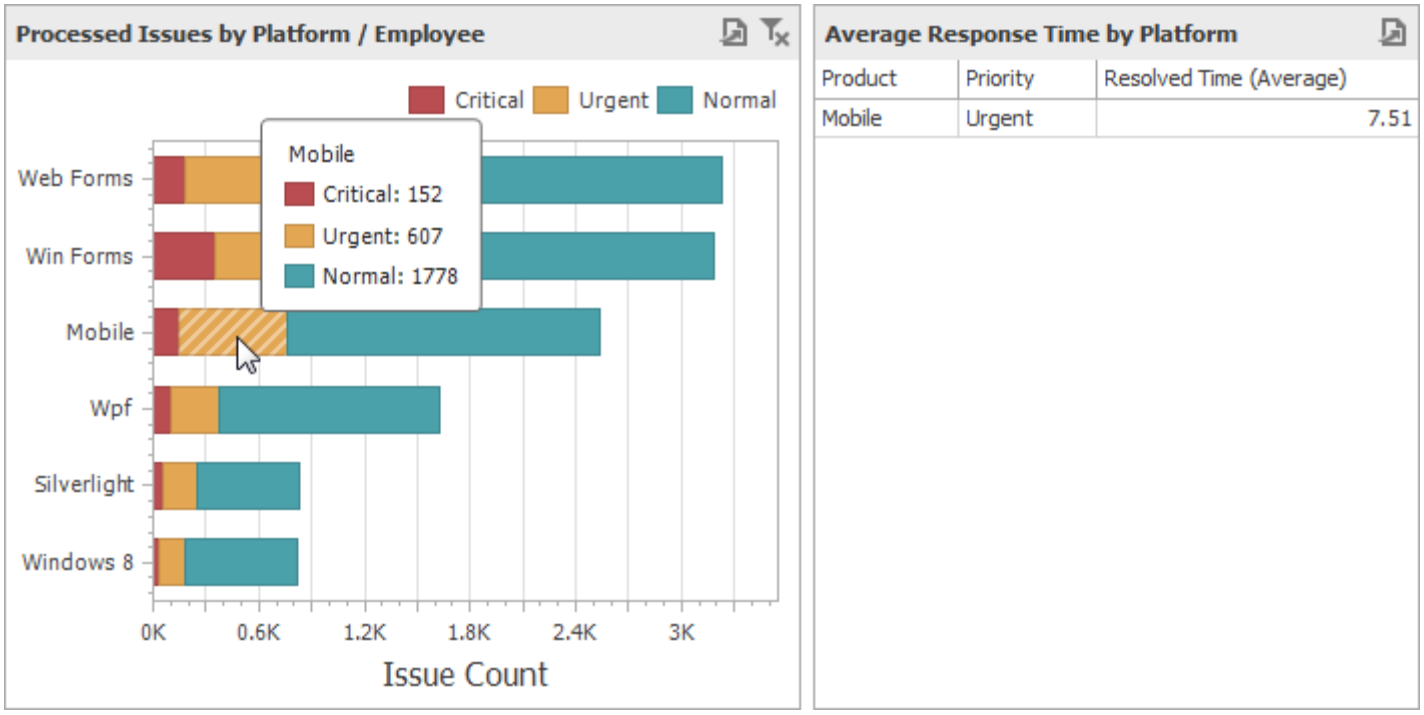
Product	Priority	Resolved Time (Average)
Wpf	Urgent	6.99
Windows 8	Urgent	7.55
Win Forms	Urgent	6.94
Web Forms	Urgent	7.54
Silverlight	Urgent	7.45
Mobile	Urgent	7.51

To enable filtering by series in the Designer, set the required Master Filter mode and click the Series button in the Data Ribbon tab (or the button if you are using the toolbar menu).

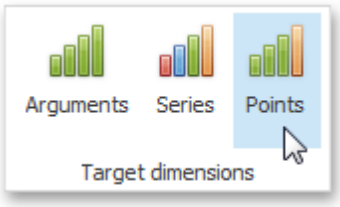


Filtering by Points

When filtering by points is enabled, you can click a individual point to make other dashboard items display only data related to the selected point.

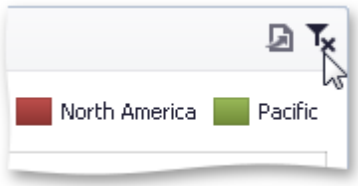


To enable filtering by points in the Designer, set the required Master Filter mode and click the Points button in the Data Ribbon tab.

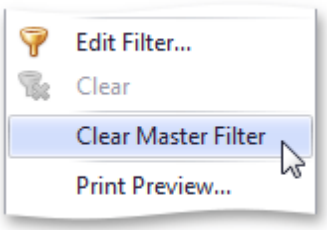


Reset Filtering

To reset filtering, use the Clear Master Filter button in the Chart's caption area



or the corresponding command in the Chart's context menu.



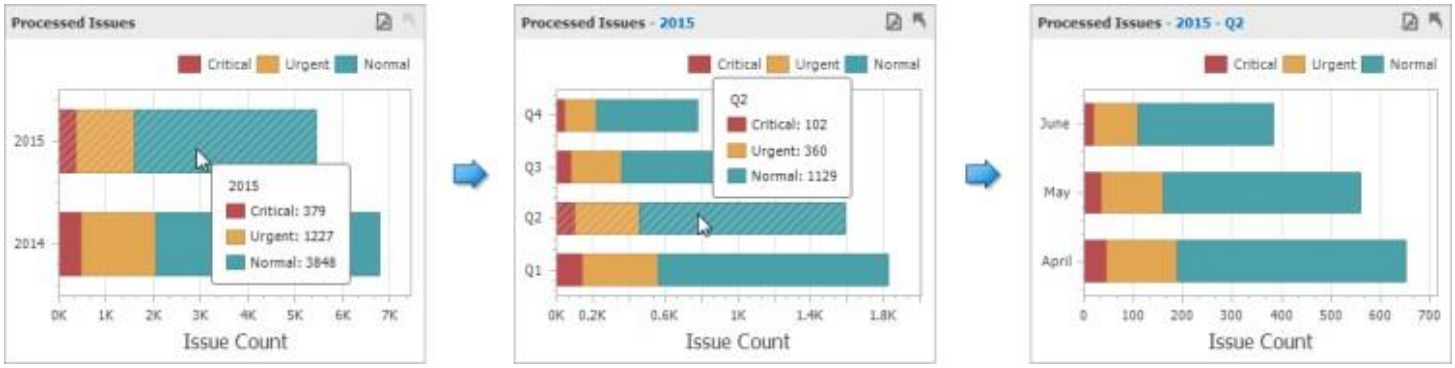
Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more about drill-down concepts common to all dashboard items, see the Drill-Down topic.

The Chart dashboard item supports drill down on argument or series values.

Drill Down on an Argument

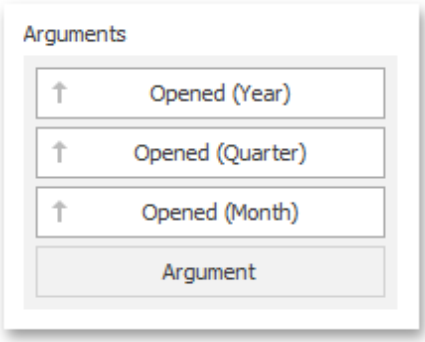
When drill down on arguments is enabled, you can click a series point to view a detail chart for the corresponding argument value.



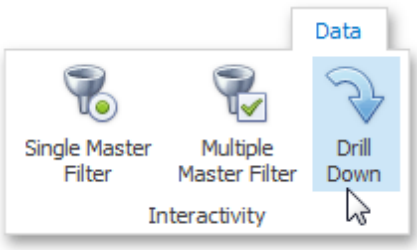
Note

When Filtering by Arguments is enabled, you can view the details by double-clicking a series point.

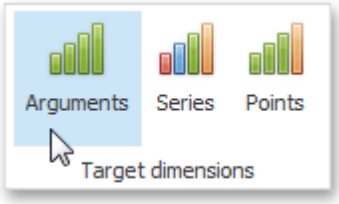
Drill down on arguments requires that the Arguments section contains several data items, from the least detailed to the most detailed item.



To enable drill down on arguments, click the Drill Down button in the Data Ribbon tab (or the button if you are using the toolbar menu)...



...and the Arguments button (or the button if you are using the toolbar menu).



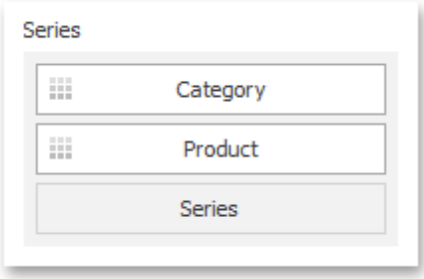
Drill Down on a Series

When drill down on a series is enabled, you can click a series point (or corresponding legend item) to view a detail chart for the corresponding series.

Note

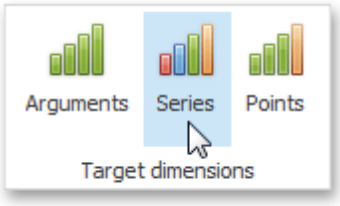
When Filtering by Series is enabled, you can view the details by double-clicking a series point.

Drill down on a series requires that the Series section contains several data items, from the least detailed to the most detailed item.



To enable drill down on a series, click the Drill Down button in the Data Ribbon tab (or the button if you are using the toolbar menu)...

...and the Series button (or the button if you are using the toolbar menu).



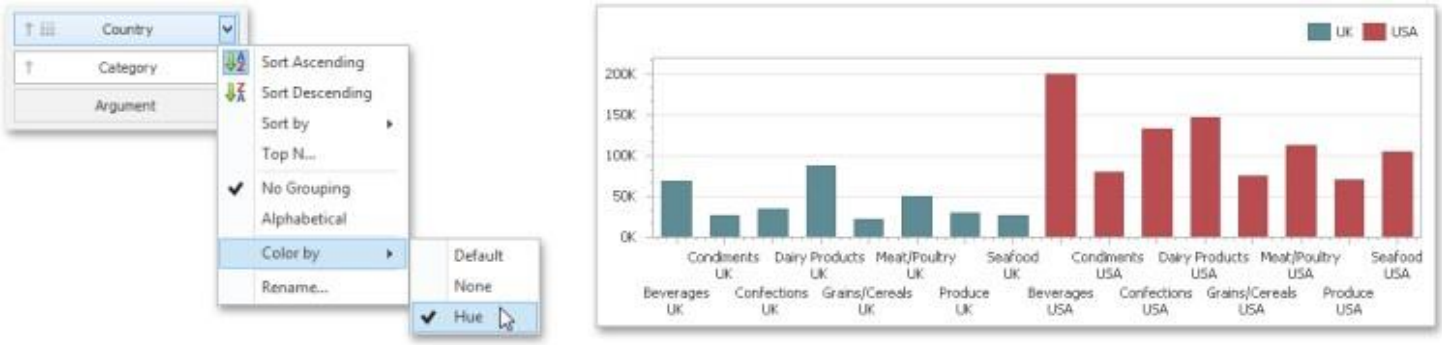
Drill Up

To return to the previous detail level (drill up), use the Drill Up button within the Chart caption or in the context menu.

Coloring

Certain dashboard items provide the capability to color dashboard item elements by associating dimension values/ measures and specified colors. You can choose whether to use a global color scheme to provide consistent colors for identical values or specify a local color scheme for each dashboard item. To learn more about coloring concepts common for all dashboard items, see the Coloring section.

By default, the Chart dashboard item colors different measures and series dimensions by hue. In the example below, series points corresponding to different countries (U K and U SA) are painted in different colors.

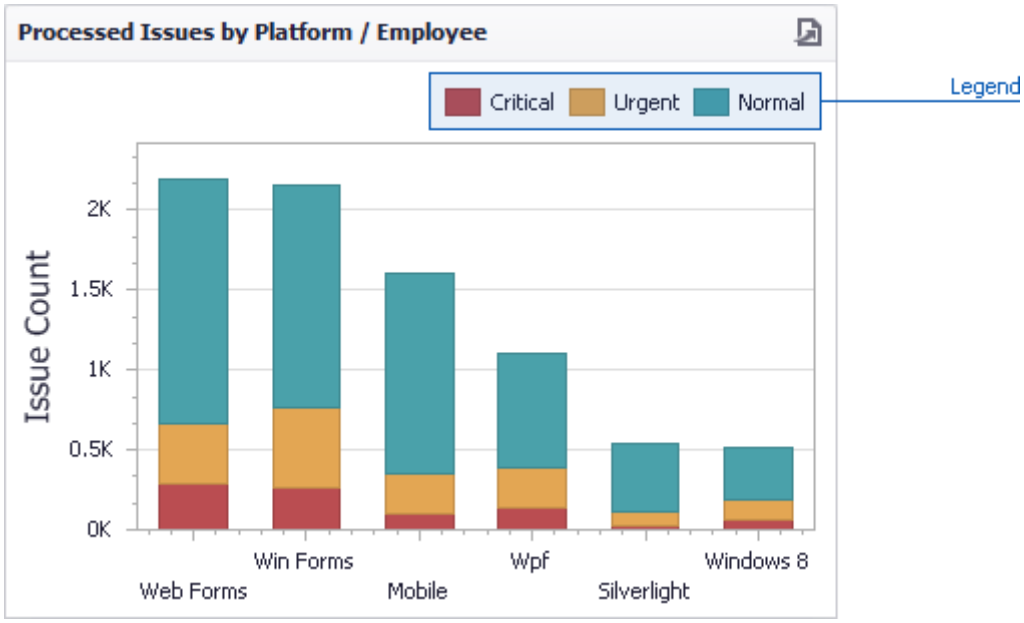


Note

Note that the Chart dashboard item does not support coloring for the financial series.

Legend

A legend is an element of a chart that identifies chart series and series points (for instance, colored points corresponding to argument values).

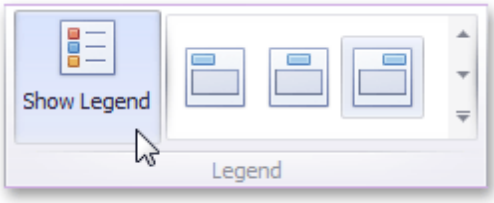


This topic describes how to customize various legend settings.

Visibility

You can specify whether or not a chart should display a legend.

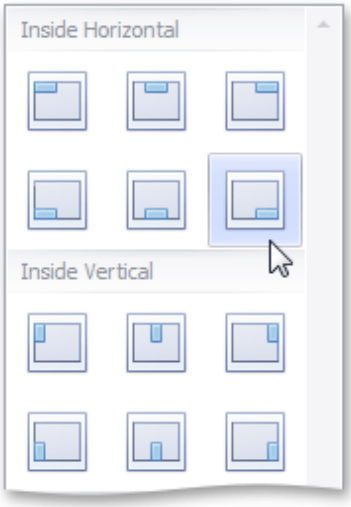
In the Designer, use the Show Legend button in the Legend section of the Design Ribbon tab.



Position and Orientation

To specify the legend's position and orientation, select one of the predefined options from the gallery in the

Design Ribbon tab.



Axes

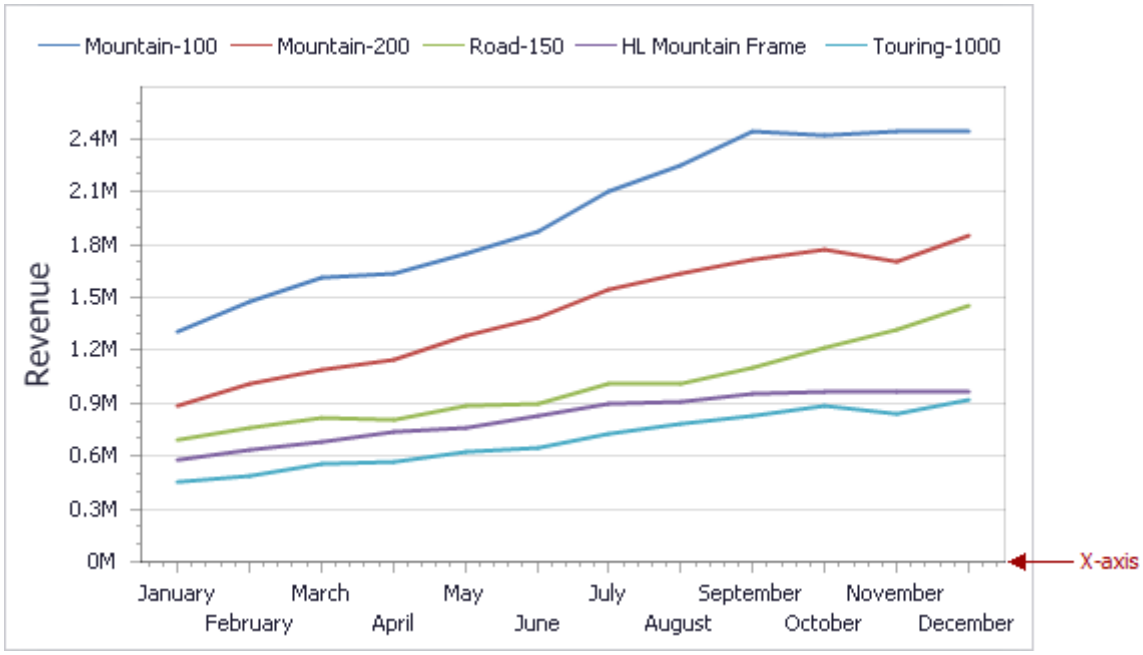
The Chart dashboard item displays two axes by default: the X-axis and the Y-axis. The topics in this section describe how to customize axis settings.

The section contains the following topics.

X-Axis
Y-Axis

X-Axis

The X-axis is the axis of arguments.



This topic consists of the following sections.

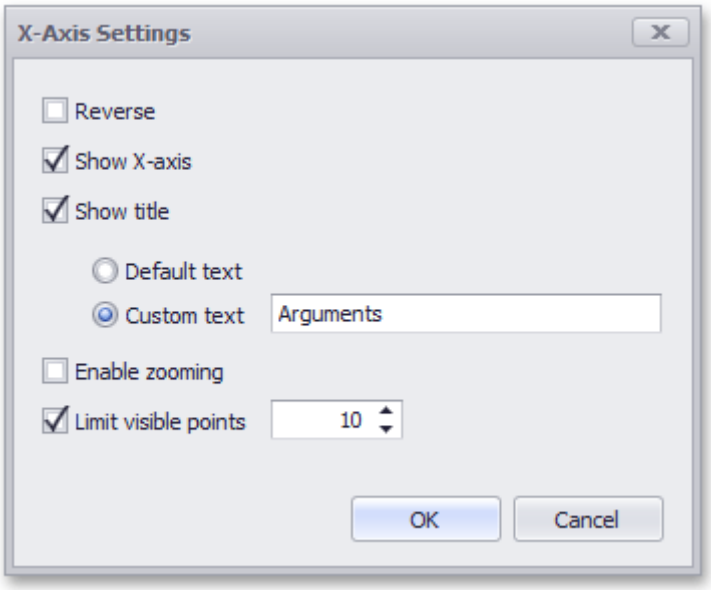
- General X-Axis Settings
- Continuous and Discrete X-Axes

General X-Axis Settings

To access X-axis settings, use the X-Axis Settings button in the Diagram section of the Design Ribbon tab.

This will invoke the X-Axis Settings dialog.

This dialog contains the following settings.

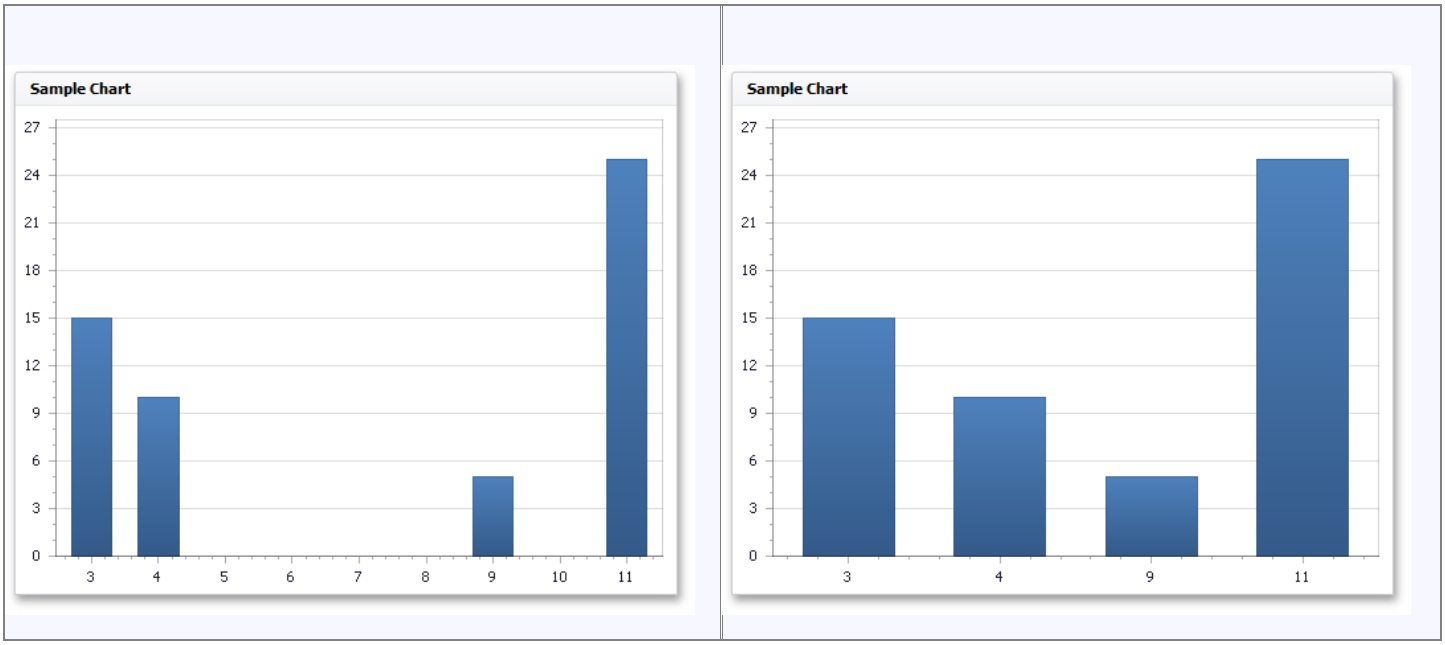


Reverse	Allows you to reverse the X-axis. If the X-axis is reversed, its values are ordered from right to left.
Show X-axis	Allows you to hide and show the X-axis.
Show title	Allows you to hide and show the X-axis title. You can choose whether to use the default text or specify a custom string.
Enable zooming	Allows you to enable zooming for the X-axis. The X- axis' scroll bar provides the capability to perform navigation in the zoomed diagram.
Limit visible points	Allows you to limit the number of points displayed on the chart's diagram along the X-axis. The X-axis' scroll bar provides the capability to perform navigation if the number of all points exceeds the number of visible points.

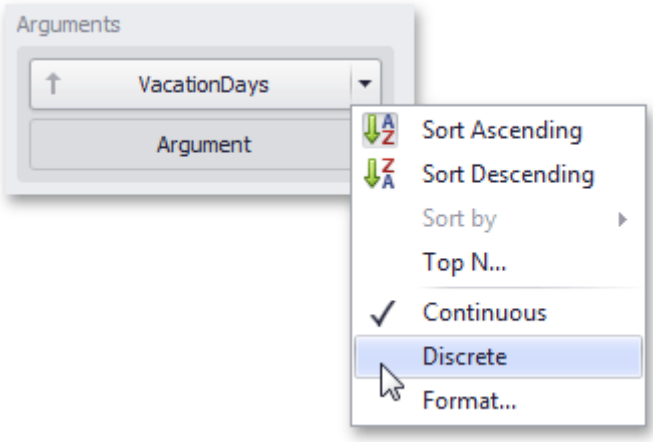
Continuous and Discrete X-Axes

If the dimension in the Arguments section contains numeric data, the Chart can create either a continuous X-axis or a discrete X-axis.

Continuous X-axis	Discrete X-axis
If a continuous axis is used, the distance between argument values is proportional to their values.	On a discrete axis, all argument values are an equal distance from each other.

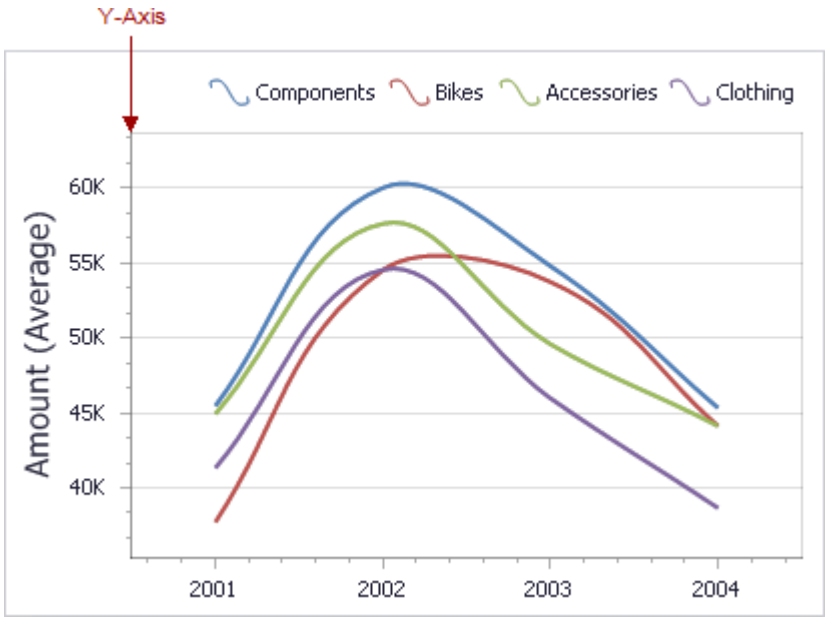


To specify the X-axis type in the Designer, invoke the data item menu for the argument dimension and select the axis type.



Y-Axis

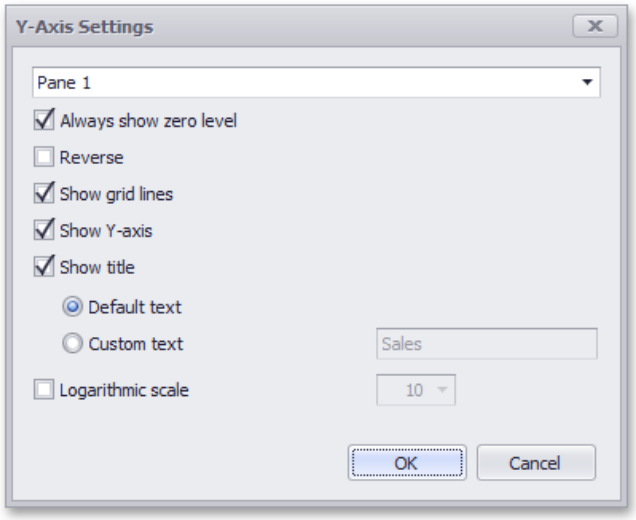
The Y-axis is the numerical axis of values.



General Settings

To access the Y-axis settings, use the Y-Axis Settings button in the Diagram section of the Design Ribbon tab.

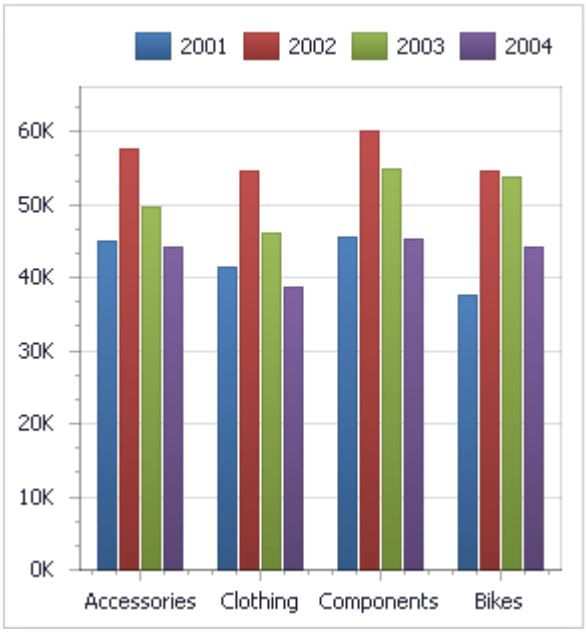
This will invoke the Y-Axis Settings dialog.



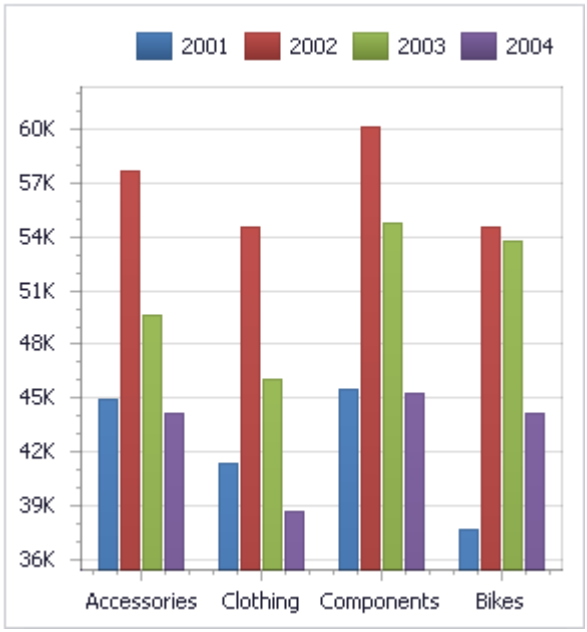
Use the combo box at the top to select the pane for the Y-axis settings you need to edit. The dialog contains the following settings.

Always show zero level - Specifies whether or not the axis' zero level is visible. If this option is unchecked, the visible axis range is defined based on the values plotted in the chart.

AlwaysShowZeroLevel == true



AlwaysShowZeroLevel == false



Reverse - Allows you to reverse the X-axis. If the X-axis is reversed, its values are ordered from top to down.

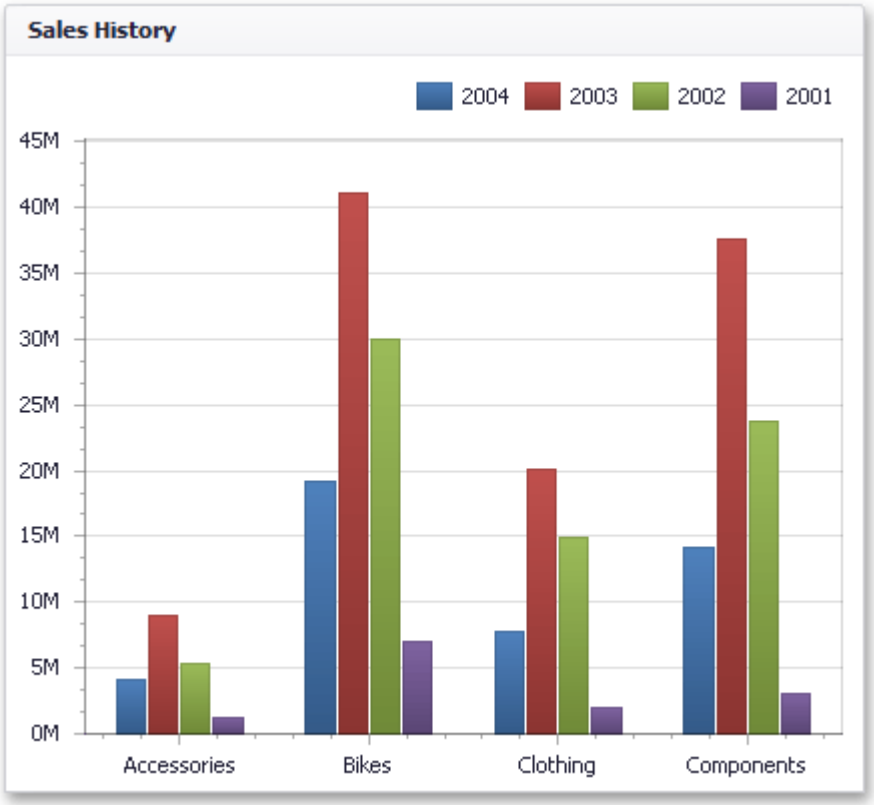
Show grid lines - Allows you to hide and show grid lines for the Y-axis.

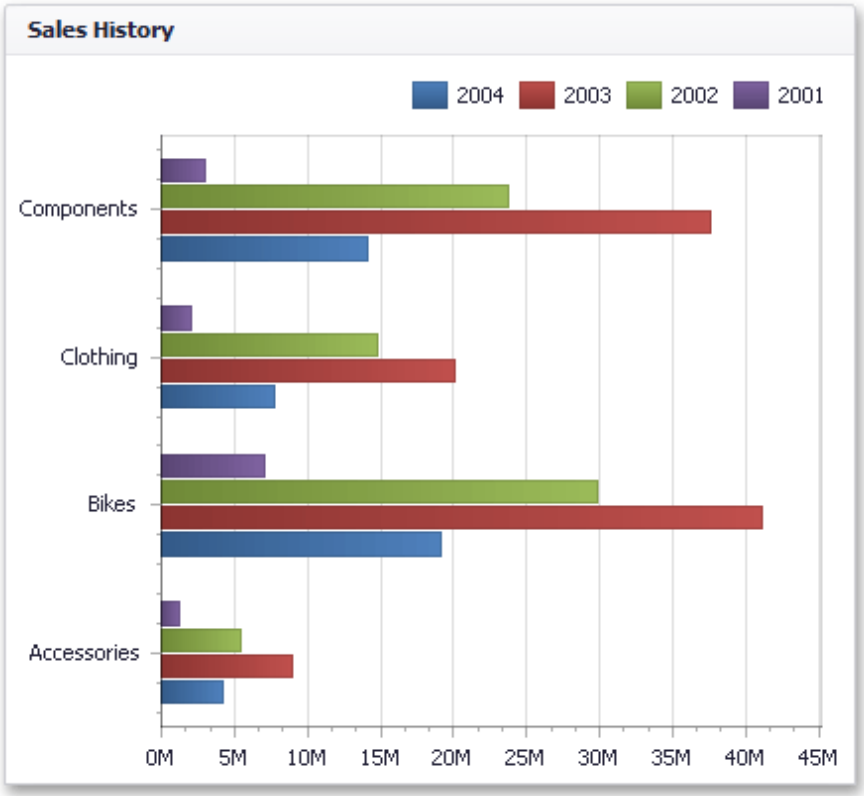
Show Y-axis - Allows you to hide and show the Y-axis.

Show title - Allows you to hide and show the Y-axis title. You can choose whether to use the default text or specify a custom string.

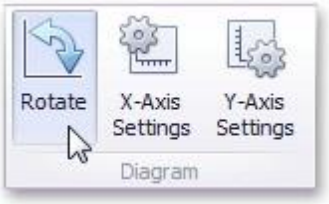
Orientation

You can rotate the Chart so that the X-axis becomes vertical, and the Y-axis becomes horizontal.



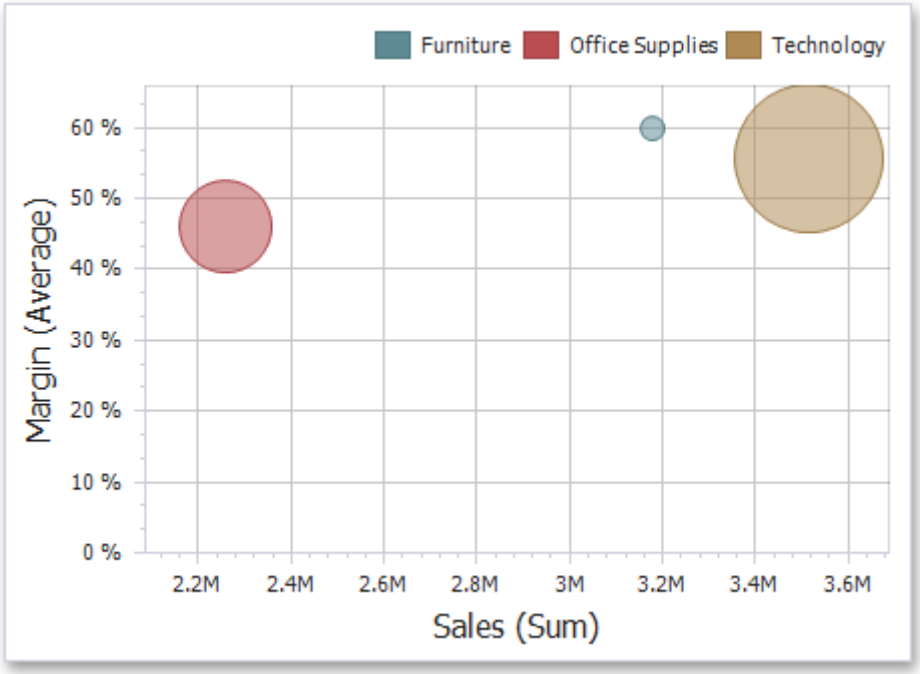


To rotate a Chart in the Designer, use the Rotate button in the Diagram group of the Design Ribbon tab.



Scatter Chart

The topics in this section describe the features available in the Scatter Chart dashboard item, and provide information on how to create and customize scatter charts in the BI Dashboard.



This section is divided into the following subsections.

- Providing Data
  Provides information on how to supply the Scatter Chart dashboard item with data.
- Interactivity
  Describes features that enable interaction between the Scatter Chart and other dashboard items.
- Coloring
  Describes coloring capabilities of the Scatter Chart dashboard item.
- Legend
  Provides information about the chart legend and its options.
- Axes
  Describes how to customize settings related to chart axes.
- Orientation
  Describes how to toggle the chart's orientation.
- Labels
  Provides information about point labels and tooltips that contain descriptions of data points.

Providing Data

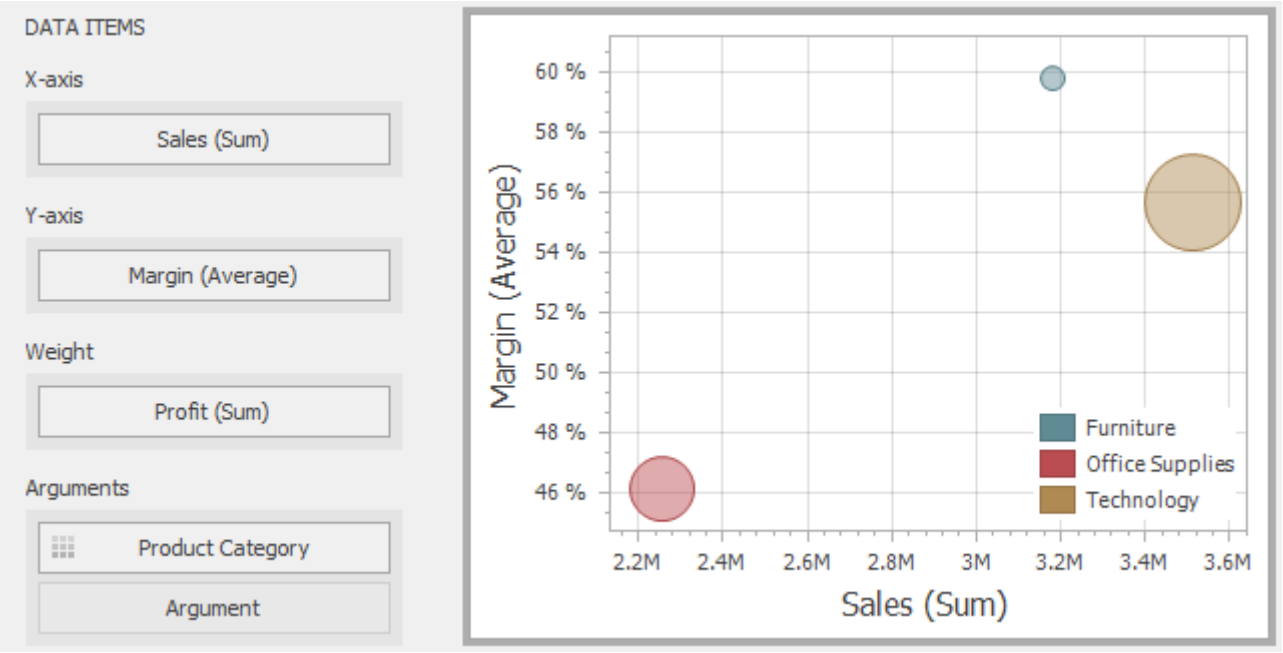
The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic.

The only difference is in the data sections that the required dashboard item has. This topic describes how to bind a Scatter Chart dashboard item to data in the Designer.

- Binding to Data in the Designer
- Transposing X- and Y-axis

Binding to Data in the Designer

The image below shows a sample Scatter Chart dashboard item that is bound to data.

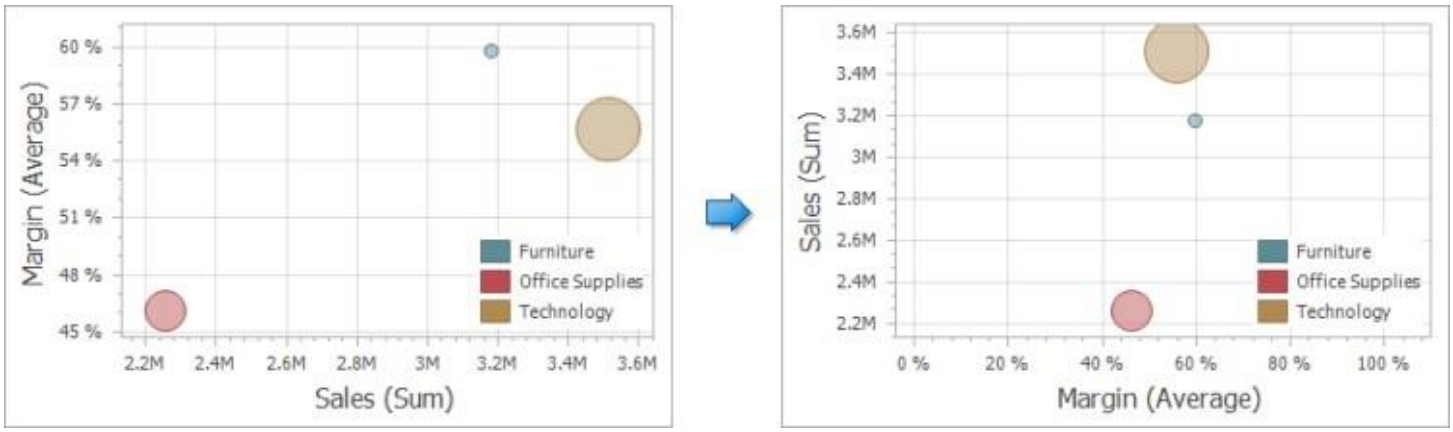


To bind the Scatter Chart dashboard item to data, drag and drop a data source field to a placeholder contained in one of the available data sections. A table below lists and describes Scatter Chart data sections.

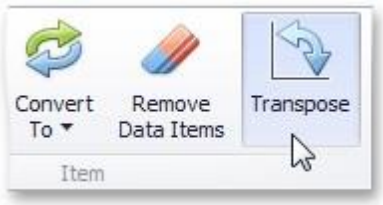
Section	Description
X-Axis	Contains the data item against which the X- coordinates of data points are calculated.
Y-Axis	Contains the data item against which the Y- coordinates of data points are calculated.
Weight	Contains the data item whose values are used to calculate the weight of data points.
Arguments	Contains data items providing scatter chart arguments that are used to create data points.

Transposing X- and Y-axis

The Scatter Chart dashboard item provides the capability to transpose its axes. In this case, the data item contained in the X-Axis section is moved to the Y-Axis section, and vice versa.



To transpose the selected Scatter Chart dashboard item, use the Transpose button in the Home ribbon tab.



Interactivity

This section describes features that enable interaction between the Scatter Chart and other dashboard items. These features include Master Filtering and Drill-Down.

The section contains the following topics.

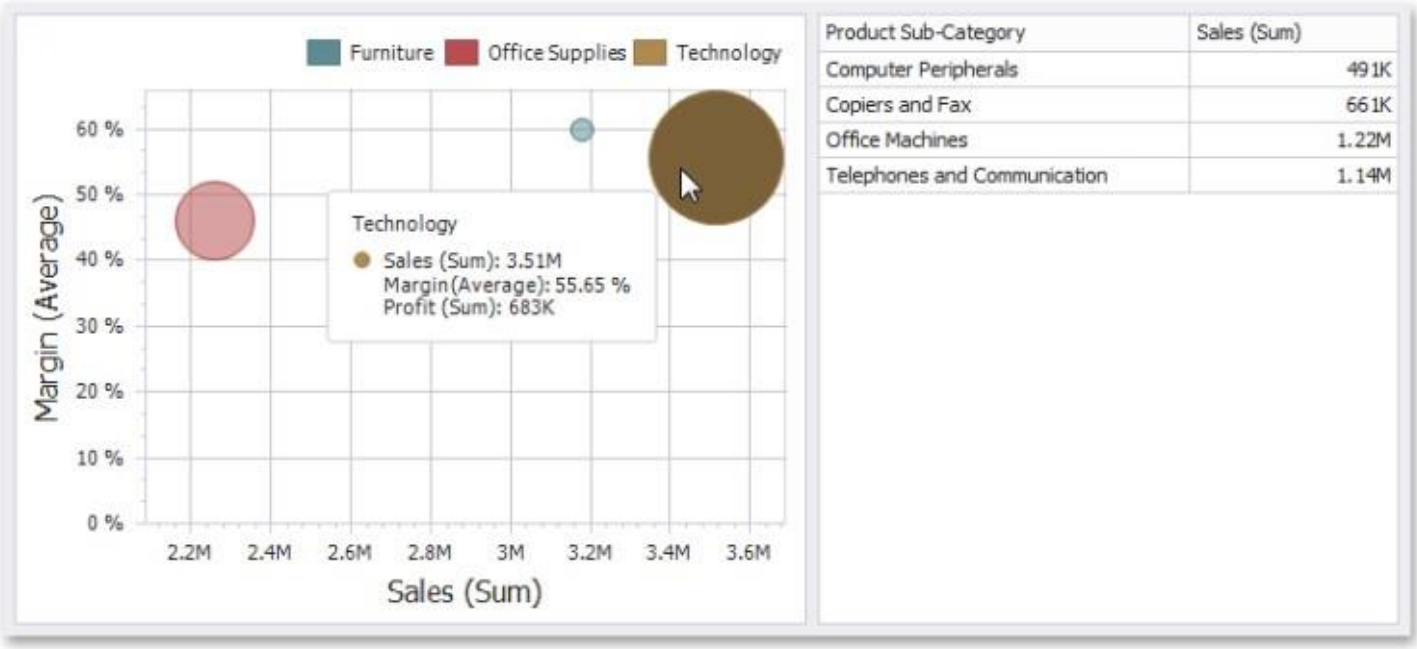
- Master Filtering
- Drill-Down

Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

The Scatter Chart dashboard item supports filtering by points that correspond to specific argument values or their combinations.

When Master Filtering is enabled, you can click a point (or multiple points by holding down the CTRL key) to make other dashboard items only display data related to the selected point(s).



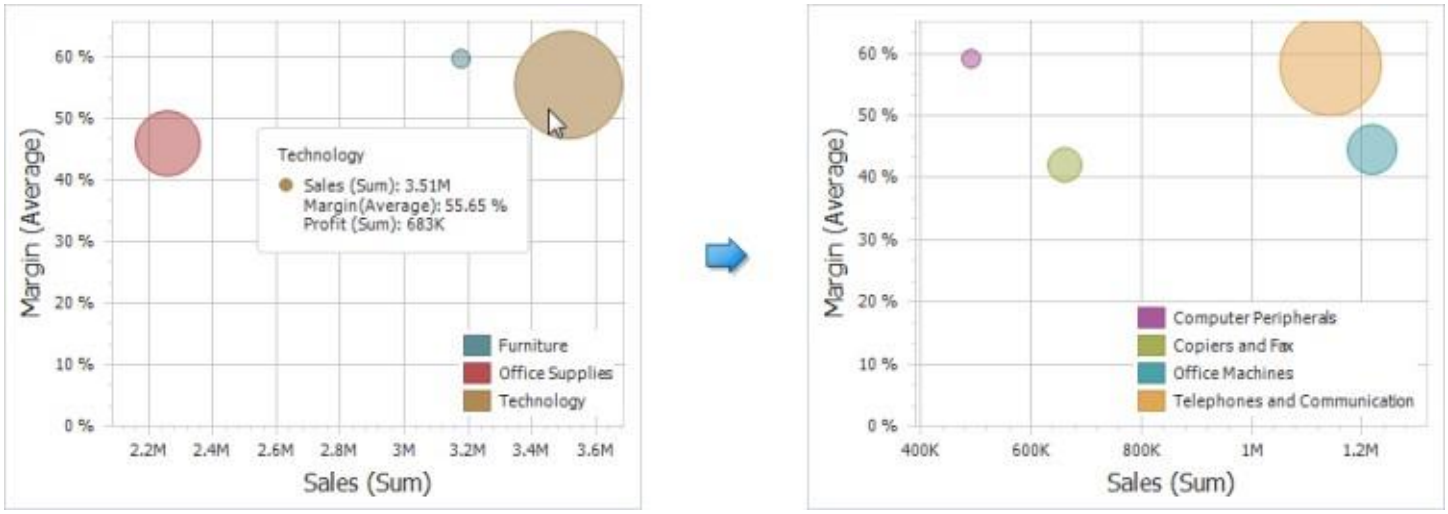
To learn how to enable Master Filtering in the Designer, see the Master Filtering topic.

To reset filtering, use the Clear Master Filter ( ) button in the Chart's caption area, or the Clear Master Filter command in the context menu.

Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more about drill-down concepts common to all dashboard items, see the Drill-Down topic.

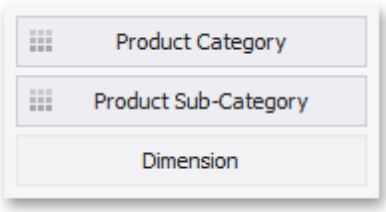
When drill-down is enabled, you can click a point to view the details.



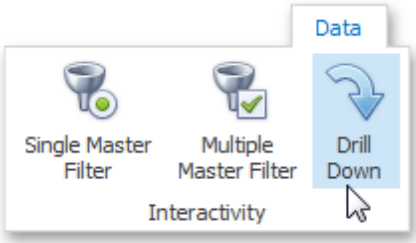
Note

When Master Filtering is enabled, you can view the details by double-clicking a point.

Drill-down requires that the Arguments section contain several dimensions, from the least to the most detailed dimension.



To enable drill-down, click the Drill Down button in the Data Ribbon tab (or the button if you are using the toolbar menu).

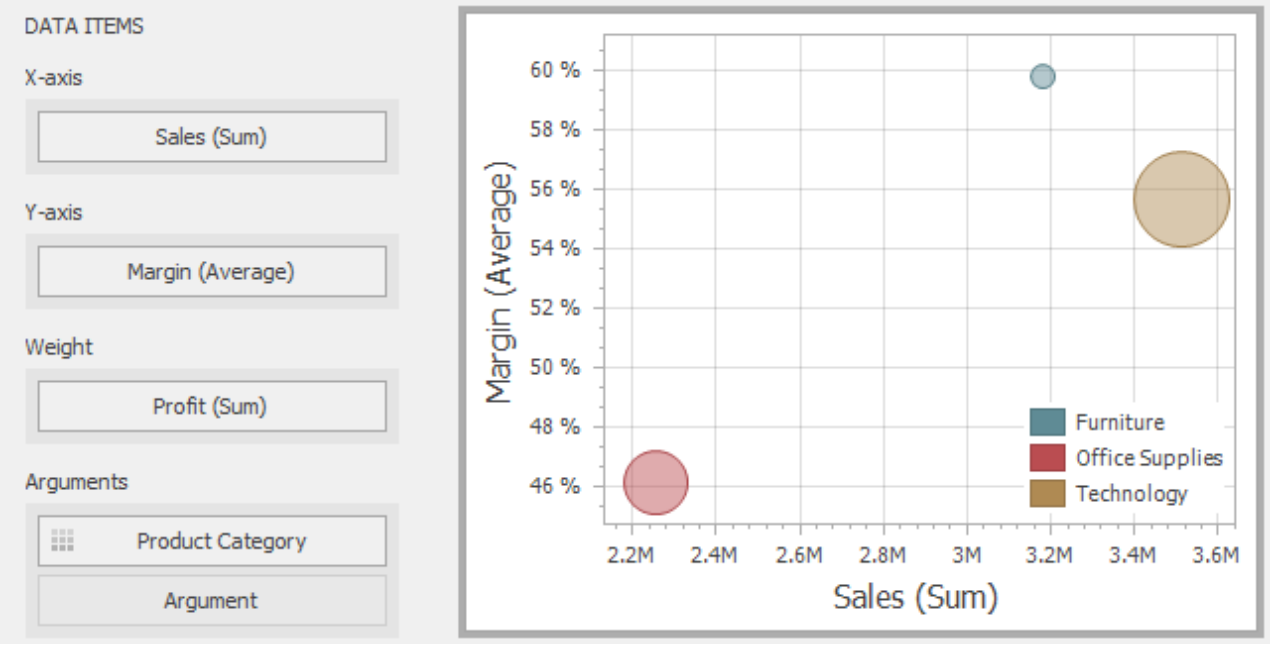


To return to the previous detail level (drill up), use the Drill Up ( ) button in the caption of the Scatter Chart dashboard item, or the Drill Up command in the context menu.

Coloring

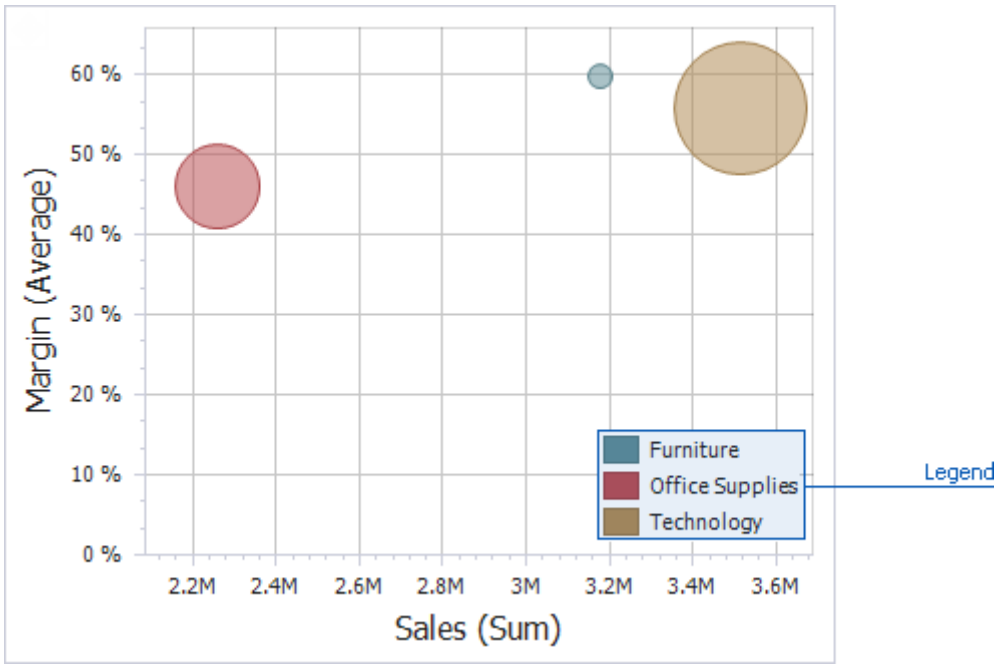
Certain dashboard items provide the capability to color dashboard item elements by associating dimension values/ measures and specified colors. You can choose whether to use a global color scheme to provide consistent colors for identical values or specify a local color scheme for each dashboard item. To learn more about coloring concepts common for all dashboard items, see the Coloring section.

By default, the Scatter Chart dashboard item does not color its arguments. If necessary, you can change this behavior. For instance, the image below displays the Scatter Chart dashboard item whose Produ ct Category points are colored by hue.



Legend

A legend is an element of a scatter chart that identifies chart points (for instance, colored points corresponding to argument values).

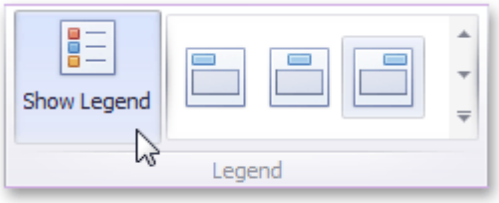


This topic describes how to customize various legend settings.

Visibility

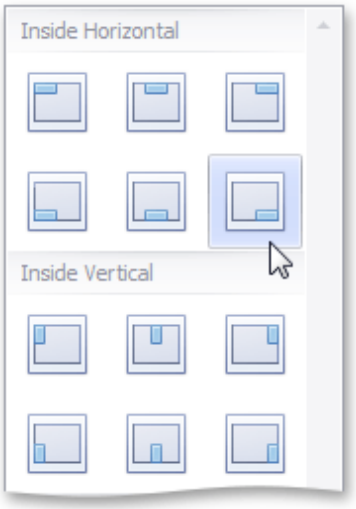
You can specify whether or not a chart should display a legend.

In the Designer, use the Show Legend button in the Legend section of the Design Ribbon tab.



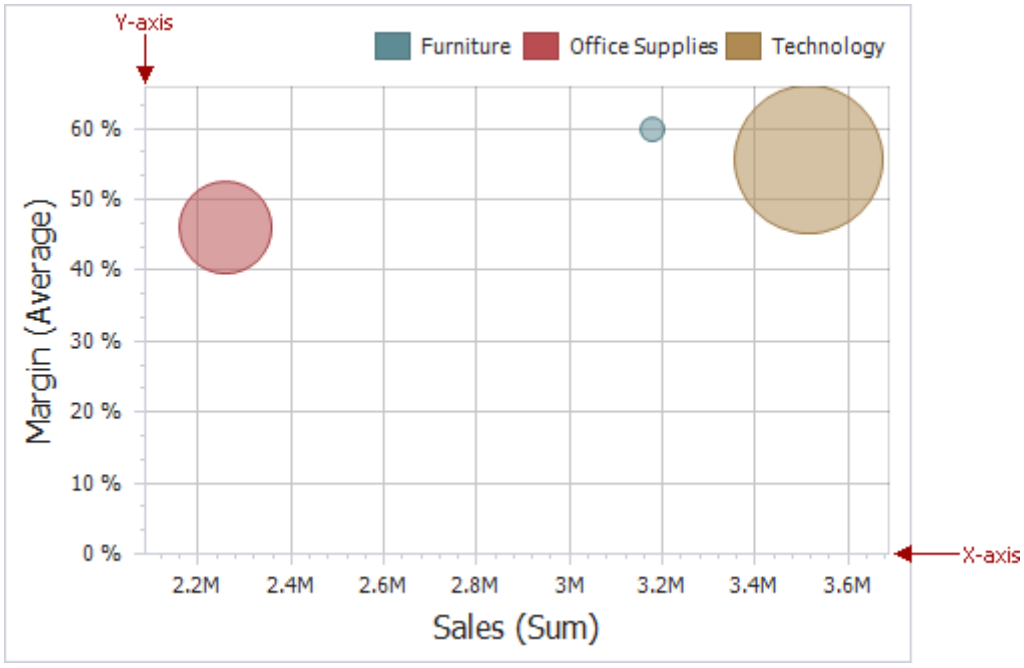
Position and Orientation

To specify the legend's position and orientation, select one of the predefined options from the gallery in the Design Ribbon tab.



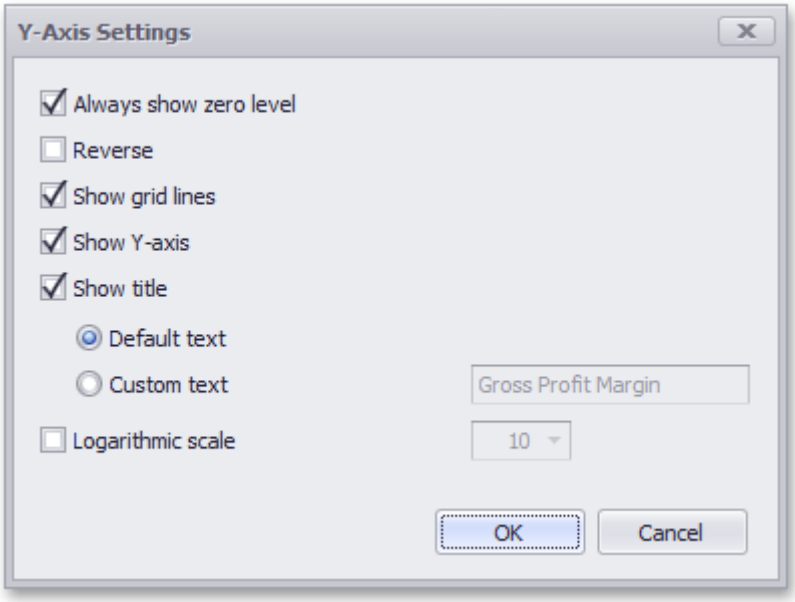
Axes

Scatter Chart X and Y-axes are numerical axis of values. You can specify various axes settings to change visual data presentation.



To access X and Y-axis settings, use the X-Axis Settings/Y-Axis Settings buttons in the Diagram section of the Design Ribbon tab.

This will invoke the X-Axis Settings/Y-Axis Settings dialog.



In this dialog, you can specify the following settings.

Always show zero level - Specifies whether or not the axis' zero level is visible. If this option is unchecked, the visible axis range is defined based on the values plotted in the chart.

Note

Note that the **X-Axis Settings** dialog does not contain this option.

Reverse - Allows you to reverse the axis. If the axis is reversed, its values are ordered from top to down.

Show grid lines - Allows you to hide and show grid lines for the axis.

Show axis - Allows you to hide and show the axis.

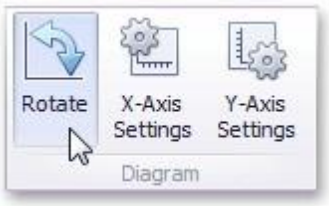
Show title - Allows you to hide and show the axis title. You can choose whether to use the default text or specify a custom string.

Logarithmic scale - Specifies whether or not the axis should display its numerical values using a logarithmic scale. The combo box next to this option allows you to select the logarithmic base from one of the predefined values.

Orientation

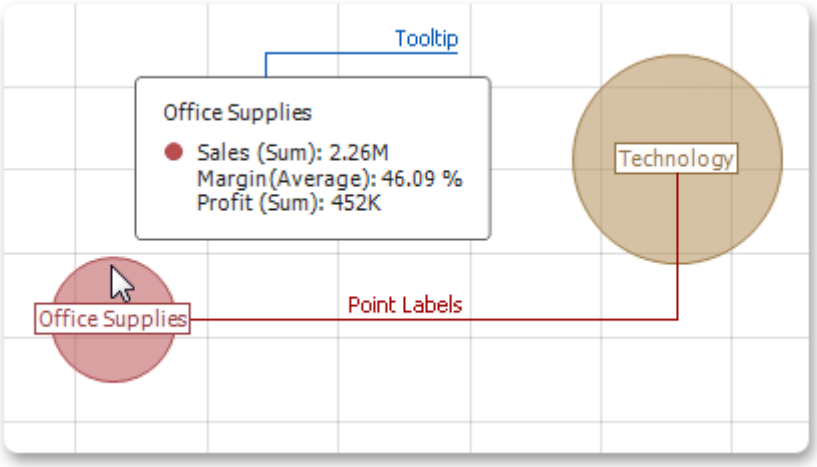
You can rotate the Scatter Chart so that the X-axis becomes vertical, and the Y-axis becomes horizontal.

To rotate a Chart in the Designer, use the Rotate button in the Diagram section of the Design Ribbon tab.



Labels

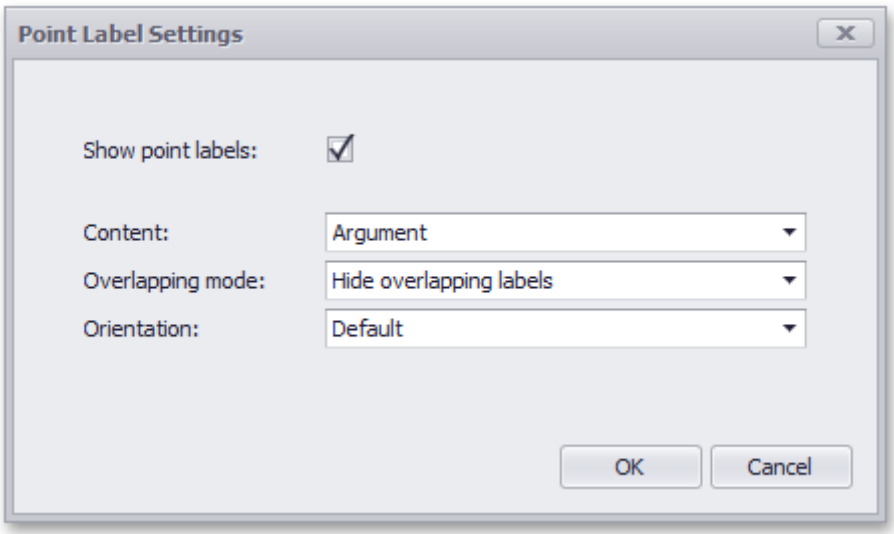
The Scatter Chart display can display point labels that contain descriptions for data points, and provide tooltips with additional information.



Point Labels

To manage the visibility of point labels, click the Point Labels button in the Design ribbon tab.

In the invoked Point Label Settings dialog, enable the Show point labels check box to show point labels.

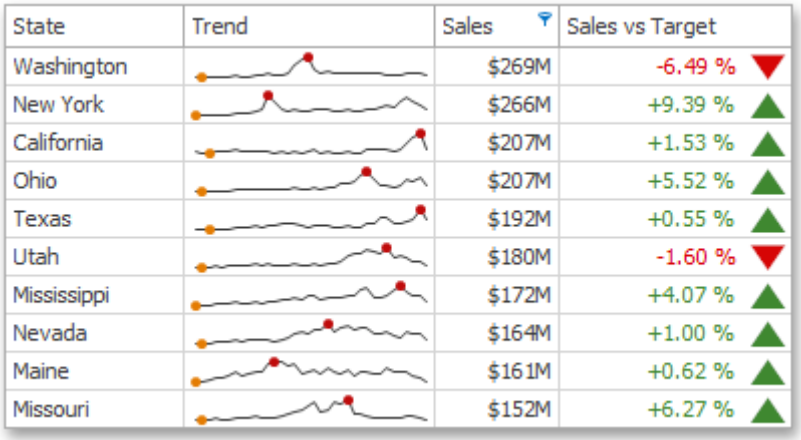


You can specify the following settings for point labels:

- Content - Specifies the type of content displayed within point labels. You can select one of the following options.
- Values - Point labels show summary values from X and Y-axes.
- Argument - Point labels show argument values.
- Argument and values - Point labels show argument values and corresponding summary values.
- Weight - Point labels show the weight summary value.
- Argument and weight - Point labels show the argument value and the corresponding weight summary value.
- Overlapping mode - Specifies the label overlap mode. The following options are available.
- Hide overlapping labels - If two or more labels overlap, some of them are automatically hidden to avoid overlapping.
- None - The overlapping resolving algorithm is disabled.
- Reposition overlapping labels - The default algorithm to re-position point labels in a random way, and avoid overlapping labels.
- Orientation - Specifies the orientation of point labels. The following options are available.
- Default - A point label is displayed in its default orientation.
- Rotate to the Righ t - A point label is rotated 90 degrees clockwise.
- Rotate to the Left - A point label is rotated 90 degrees counter clockwise.

Grid

The topics in this section describe the features available in the Grid dashboard item, and provide extensive information on how to create and customize grids in the Dashboard Designer.



State	Trend	Sales	Sales vs Target
Washington		$269M	-6.49 %
New York		$266M	+9.39 %
California		$207M	+1.53 %
Ohio		$207M	+5.52 %
Texas		$192M	+0.55 %
Utah		$180M	-1.60 %
Mississippi		$172M	+4.07 %
Nevada		$164M	+1.00 %
Maine		$161M	+0.62 %
Missouri		$152M	+6.27 %

This section consists of the following subsections.

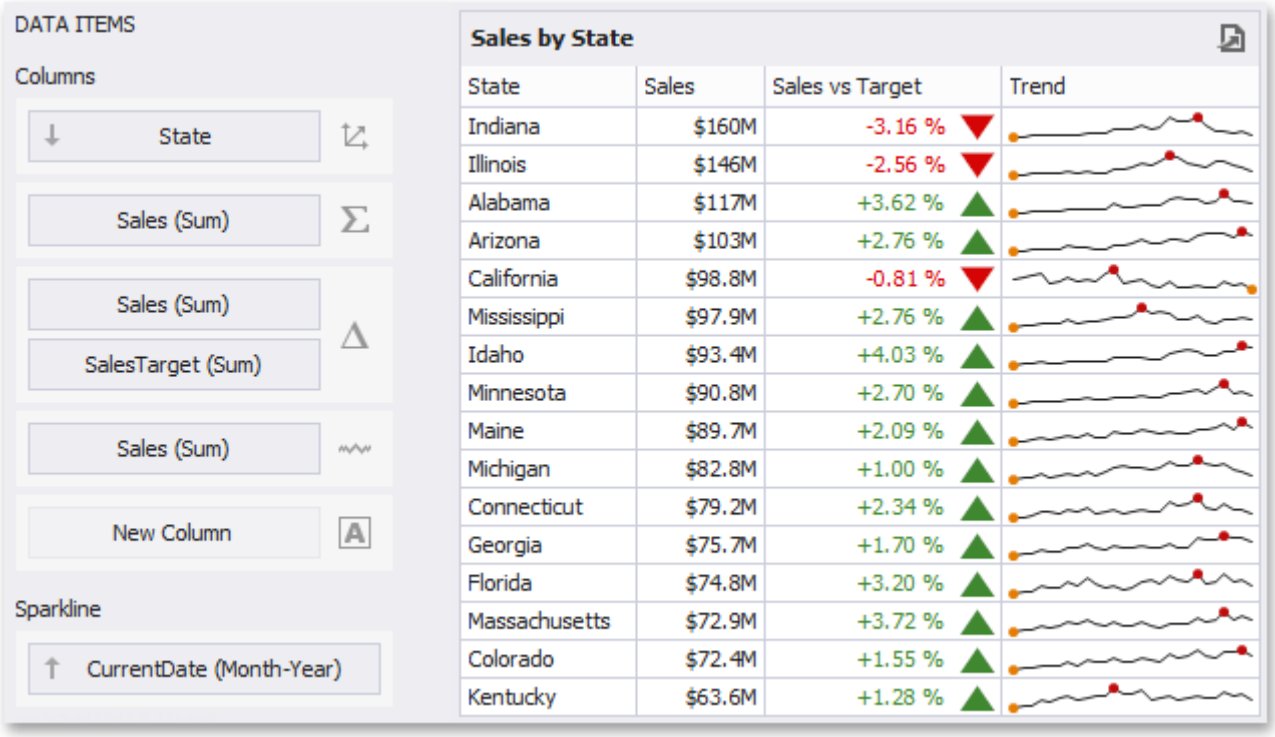
- Providing Data
  Provides information about how to supply the Grid dashboard item with data.
- Columns
  Describes different types of grid columns.
- Interactivity
  Describes features that imply interaction between the Grid and other dashboard items.
- Conditional Formatting
  Describes the conditional formatting feature that provides the capability to apply formatting to grid cells whose values meet the specified condition.
- Totals
  Describes totals that allow you to calculate summaries against values displayed within Grid columns.
- Layout
  Describes the Grid's layout options.
- Style
  Describes the Grid's style settings.

Providing Data

The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic.

The only difference is in the data sections that the required dashboard item has. This topic describes how to bind a Grid dashboard item to data in the Designer.

The image below shows a sample Grid dashboard item that is bound to data.



To bind the Grid dashboard item to data, drag and drop a data source field to a placeholder contained in one of the available data sections. A table below lists and describes a Grid's data sections.

Section	Description
Columns	Contains data items that provide values for grid columns. The Option s button next to the Column data item allows you to select the column type and specify their options.
Sparkline	Contains a data item that provides arguments for sparkline columns. To learn more, see Sparkline Column.

Columns

The topics in this section describe the different types of grid columns, and contain information on when to use each column type and how to customize them based on the type.

This section consists of the following topics.

Column Type Overview

Provides general information about column types and describes how to change the type of a particular column.

Dimension Column

Describes dimension column specifics.

Measure Column

Describes measure column specifics.

Delta Column

Describes delta column specifics.

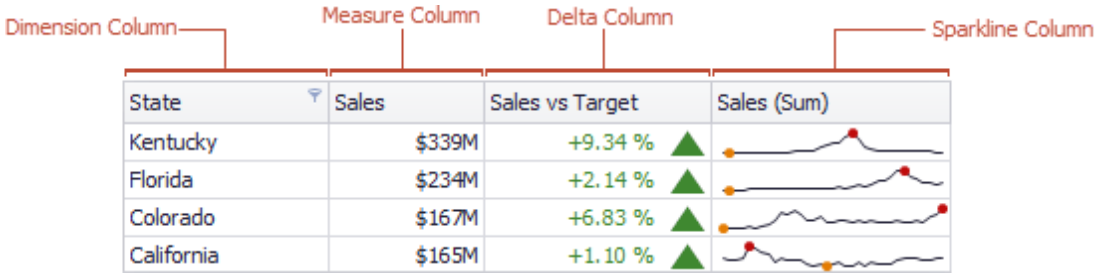
Sparkline Column

Describes sparkline column specifics.

Column Type Overview

The Grid dashboard item supports four types of columns.

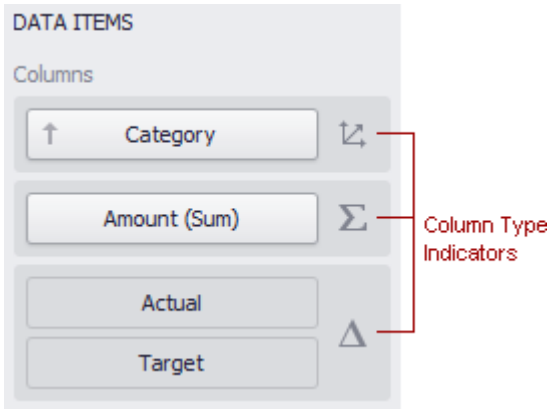
- Dimension Column
- Displays values in the bound data item "as is".
- Measure Column
- Displays summaries calculated against data in the bound data item.
- Delta Column
- Bound to two measures, it calculates summaries for both measures, and displays the difference between these summaries.
- Sparkline Column
- Displays values in the bound data item using sparklines.



When you drop a data item into the **Columns** section, the type for the new column is determined automatically, based on the data type.

Column Type Indication

The type of the column is indicated within the corresponding data item container in the DATA ITEMS area.

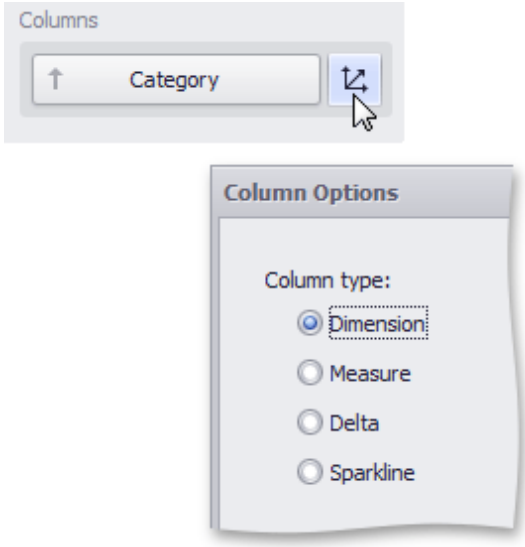


Column type indicators are defined as follows:

	Dimension Column
Σ	Measure Column
Δ	Delta Column
	Sparkline Column

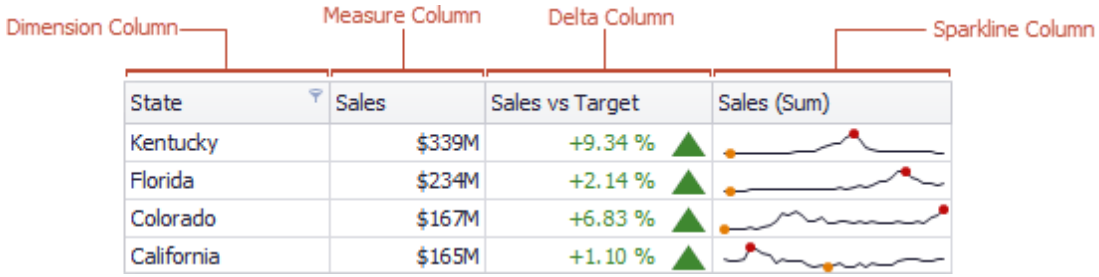
Changing Column Type

To change the column type, click the column type indicator. In the invoked Column Options window, select the required column type in the Column type section.



Dimension Column

The dimension column displays values from the bound data item "as is".



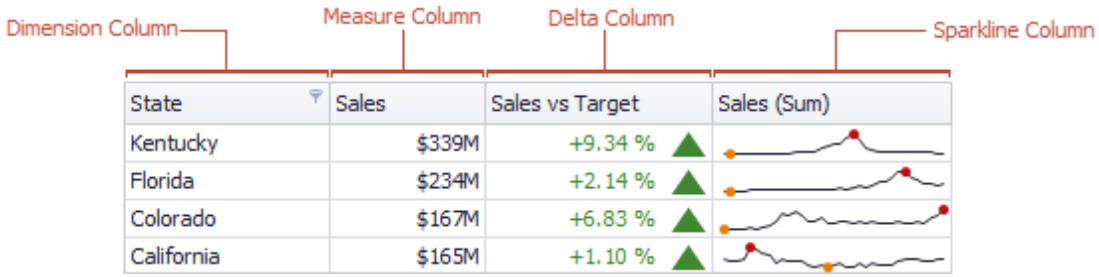
If the dimension column is bound to a data source containing images, it can display images.

See Also

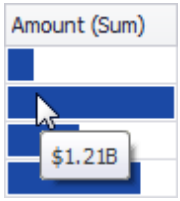
- Column Type Overview
- Measure
- Column Delta
- Column Sparkline Column

Measure Column

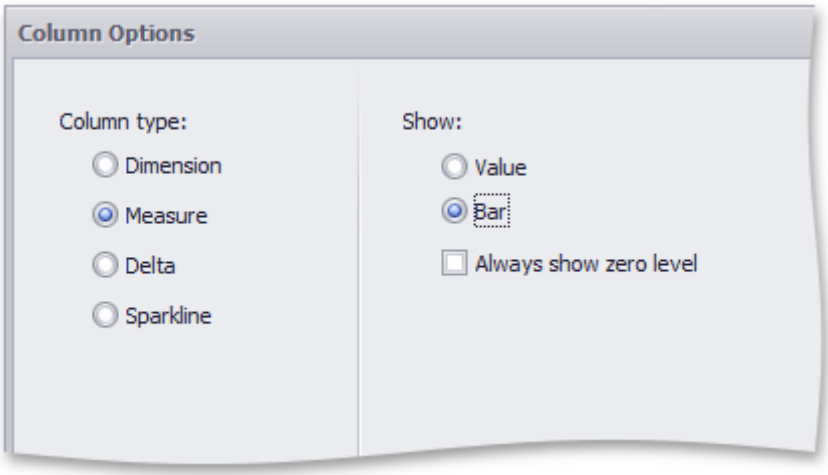
A measure column displays summaries calculated against data in a bound data item.



Values in the measure column can be displayed as text or represented by bars.



To select between these modes, invoke the Column Options window (see Column Type Overview to learn how to do this) and select Value or Bar.



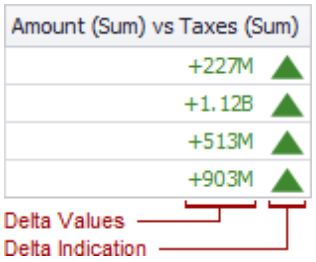
If bars are displayed, use the Always show zero level check box to specify whether the bar's zero level is always visible.

See Also

- Column Type Overview
- Dimension Column
- Delta Column
- Sparkline Column

Delta Column

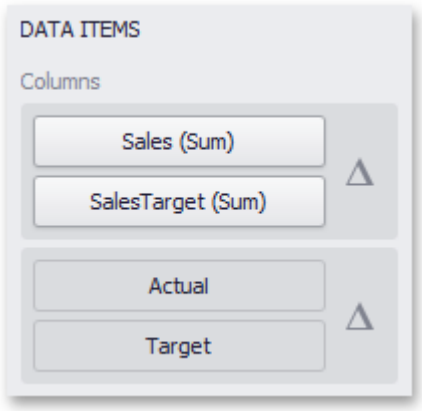
A delta column calculates summaries against two measures, and displays the difference between these summaries. This difference can be indicated with a numeric value displayed within the delta element and an additional delta indication.



Data Binding Specifics

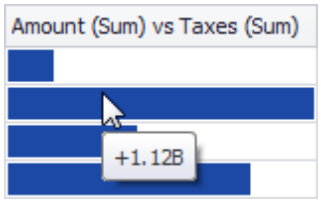
Delta columns are bound to two measures that provide two values: the Actual value and the Target value. The difference between these values is displayed in the column.

When you switch the column type to Delta, the data item container is changed, to accept the Actual and Target measures.

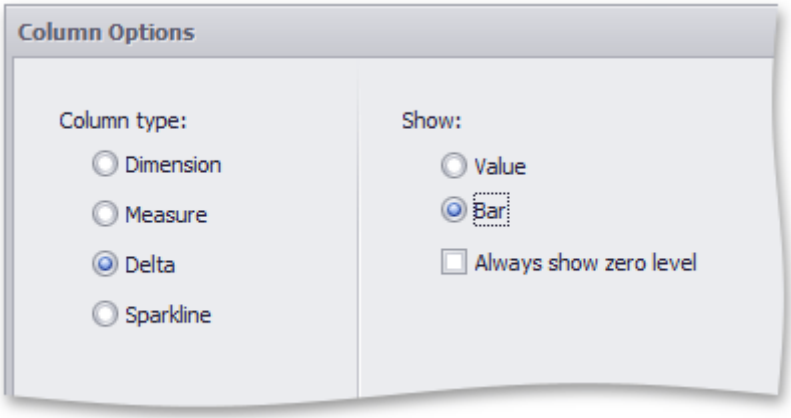


Display Mode

Values in the delta column can be displayed as text, or represented by bars.



To select between these modes, invoke the Column Options window (see the Column Type Overview topic to learn how to do this) and select Value or Bar.



If bars are displayed, use the Always show zero level check box to specify whether the bar's minimum value is zero (checked) or an automatically selected value that ensures that the difference between bars is clearly displayed (unchecked).

`AlwaysShowZeroLevel == true`

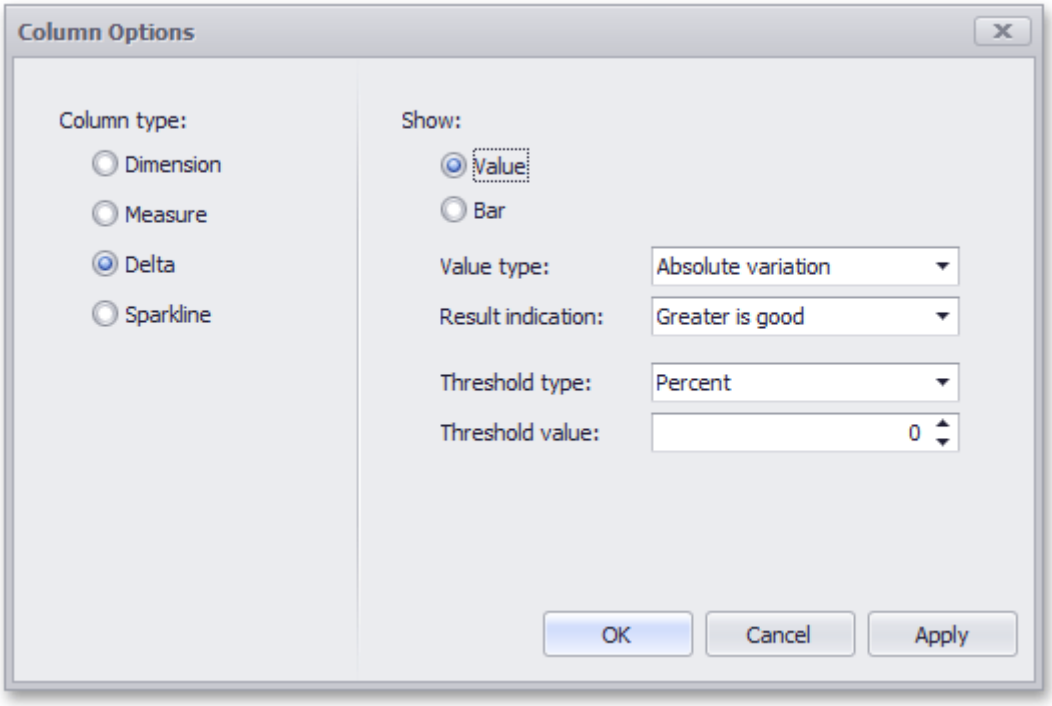
Sales	Sales
	$79.5M
	$80.3M
	$85.6M
	$86.6M
	$87.3M

`AlwaysShowZeroLevel == false`

Sales	Sales
	$79.5M
	$80.3M
	$85.6M
	$86.6M
	$87.3M

Delta Values and Indication

If the display type is set to Value, the Column Options window displays options that allow you to configure delta values and indication.



You can specify which values should be displayed in the delta column. To do this, use the Value type combo box in the Column Options window.

Actual value	Absolute variation	Percent variation	Percent of target
Sales vs Target	Sales vs Target	Sales vs Target	Sales vs Target
$113M ▲	+5.7M ▲	+5.32 % ▲	105.32 % ▲
$106M ▼	-1.02M ▼	-0.95 % ▼	99.05 % ▼
$104M ▲	+7.72M ▲	+8.02 % ▲	108.02 % ▲
$90.3M ▼	-1.38M ▼	-1.51 % ▼	98.49 % ▼

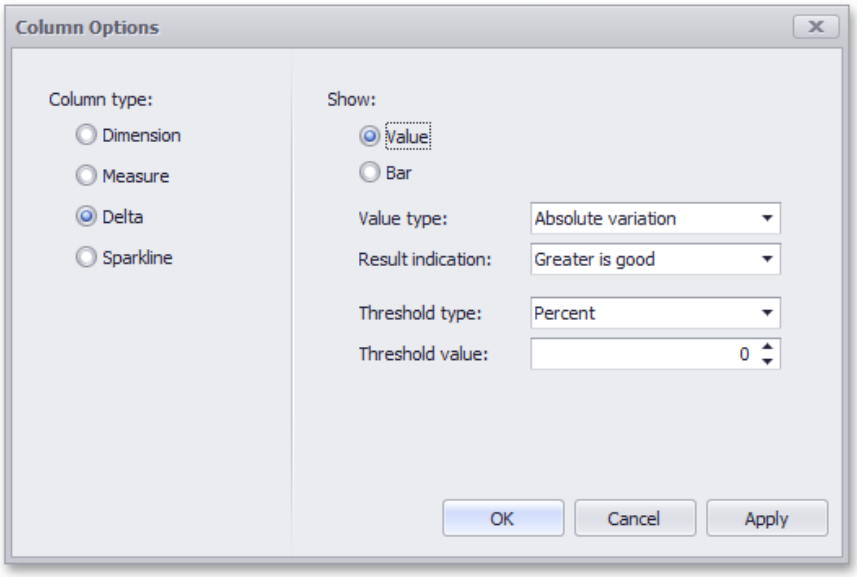
To specify the condition for displaying delta indication, use the **Result indication** combo box in the **Column Options** window.

Greater is good	Less is good	Warning if greater	Warning if less	No indication
Sales vs Target	Sales vs Target	Sales vs Target	Sales vs Target	Sales vs Target
+5.32 % ▲	+5.32 % ▲	+5.32 % ●	+5.32 %	+5.32 %
-0.95 % ▼	-0.95 % ▼	-0.95 %	-0.95 % ●	-0.95 %
+8.02 % ▲	+8.02 % ▲	+8.02 % ●	+8.02 %	+8.02 %
-1.51 % ▼	-1.51 % ▼	-1.51 %	-1.51 % ●	-1.51 %

Comparison Tolerance

The comparison tolerance allows you to specify more advanced conditions for displaying delta indication. For instance, you can set a specific indication to be displayed when the actual value exceeds the target value by 1 0 % or by $ 2 K.

Use the Threshold type combo box to select whether you wish to specify the comparison tolerance in percentage values or in absolute values. Then use the Threshold value box to specify the comparison tolerance.

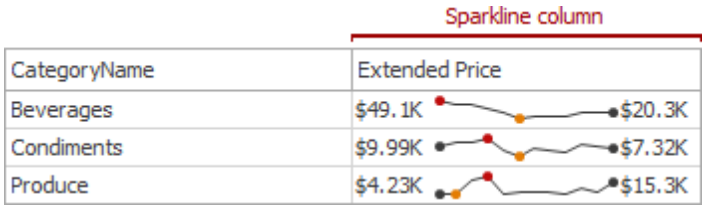


See Also

- Column Type Overview
- Dimension Column
- Measure Column
- Sparkline Column

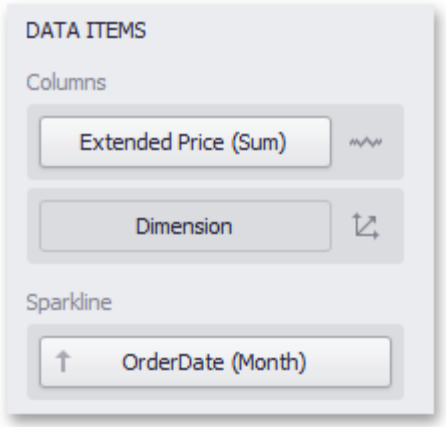
Sparkline Column

A sparkline column visualizes the variation in summary values over time.



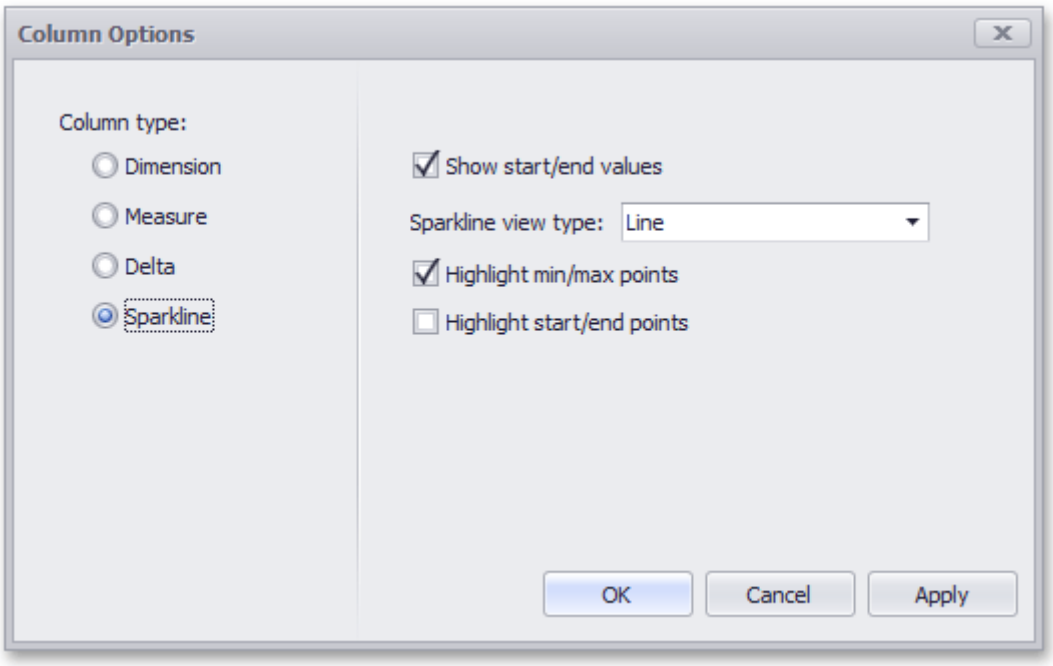
Data Binding Specifics

The sparkline column is bound to a measure providing sparkline values and to a dimension providing a date-time interval.

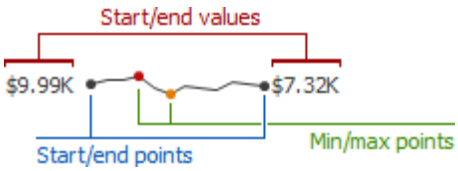


Sparkline Options

You can control sparkline appearance settings using the Column Options dialog. To invoke this dialog, click the column type indicator ( ).



In this dialog, you can control various settings that affect how the sparkline is displayed within a grid cell.



Sparkline Options	Description
Show start/end values	Species whether or not to display sparkline start/end values within a grid cell.
Sparkline view type	Defines the view type of a sparkline. Sparkline view types include **Line**, **Area**, **Bar**, and **Win/Loss**.
Highlight min/max points	Specifies whether or not to highlight the minimum/ maximum points of a sparkline.
Highlight start/end points	Specifies whether or not to highlight the start/end points of a sparkline.

See Also

- Column Type Overview
- Dimension Column
- Measure Column
- Delta Column

Interactivity

This section describes features that enable interaction between the Grid and other dashboard items. These features include Master Filtering and Drill-Down.

The section consists of the following topics.

- Master Filtering
- Drill-Down

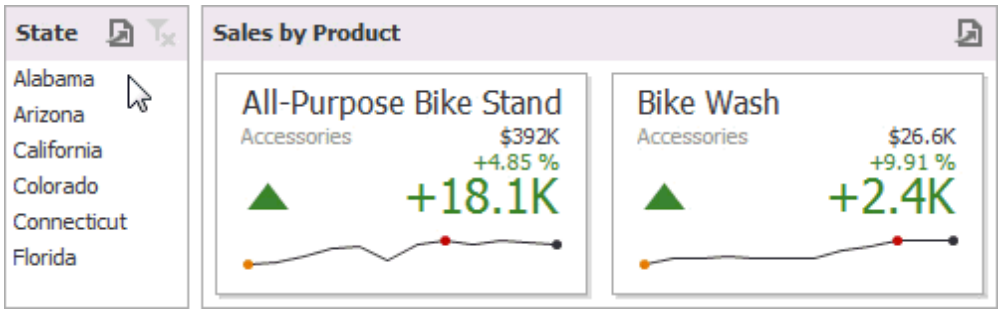
Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

Configure Master Filters in the Designer

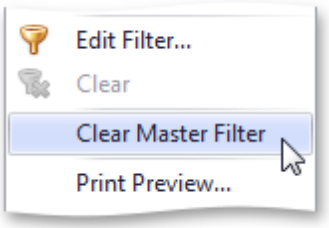
The Grid dashboard item supports filtering by rows.

When Master Filtering is enabled, you can click a grid row (or multiple rows by holding down the CTRL key) to make other dashboard items only display data related to the selected record(s).



To learn how to enable Master Filtering in the Designer, see the Master Filtering topic.

To reset filtering, use the Clear Master Filter button (the icon) in the grid's caption area, or the Clear Master Filter command in the grid's context menu.

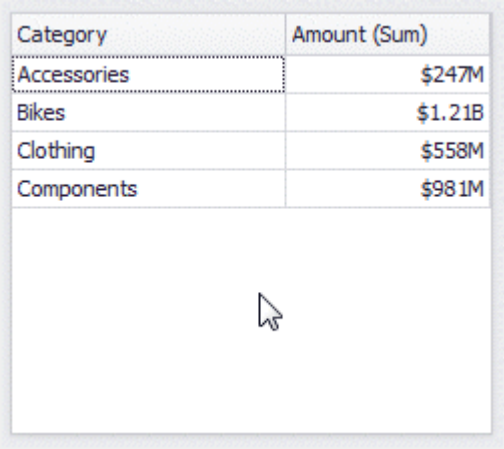


Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more about drill-down concepts common to all dashboard items, see the Drill-Down topic.

The Grid dashboard item supports drill-down for rows.

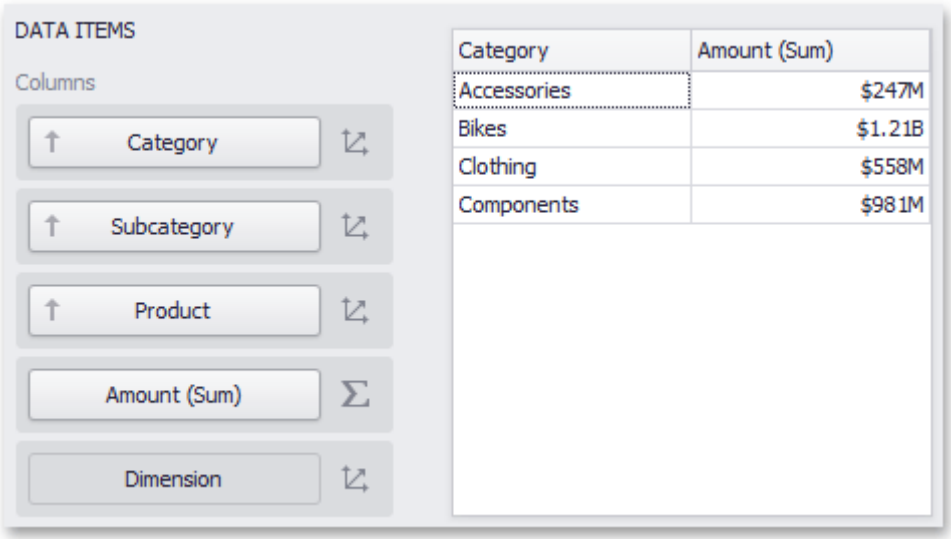
When drill-down is enabled, you can click a grid row to view the details.



Note

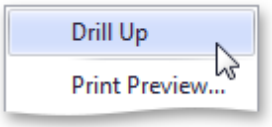
When Master Filtering is enabled, you can view the details by double-clicking a grid row.

Drill-down requires that the Columns section contains several dimensions at the top, from the least detailed to the most detailed dimension.



To enable drill-down, click the Drill Down button in the Data Ribbon tab (or the button if you are using the toolbar menu).

To return to the previous detail level (drill up), use the Drill Up button (the icon) within the grid's caption area, or the Drill Up command in the grid's context menu.



Conditional Formatting

The Grid dashboard item supports the conditional formatting feature that provides the capability to apply formatting to grid cells whose values meet the specified condition. This feature allows you to highlight specific cells or entire rows using a predefined set of rules. To learn more about conditional formatting concepts common for all dashboard items, see the Conditional Formatting topic.

- Conditional Formatting
- Overview Create a Format Rule
- Edit a Format Rule

Conditional Formatting Overview

The Grid dashboard item allows you to apply conditional formatting to data items providing data to the following column types.

- dimension column;
- measure column;
- sparkline column.

Note

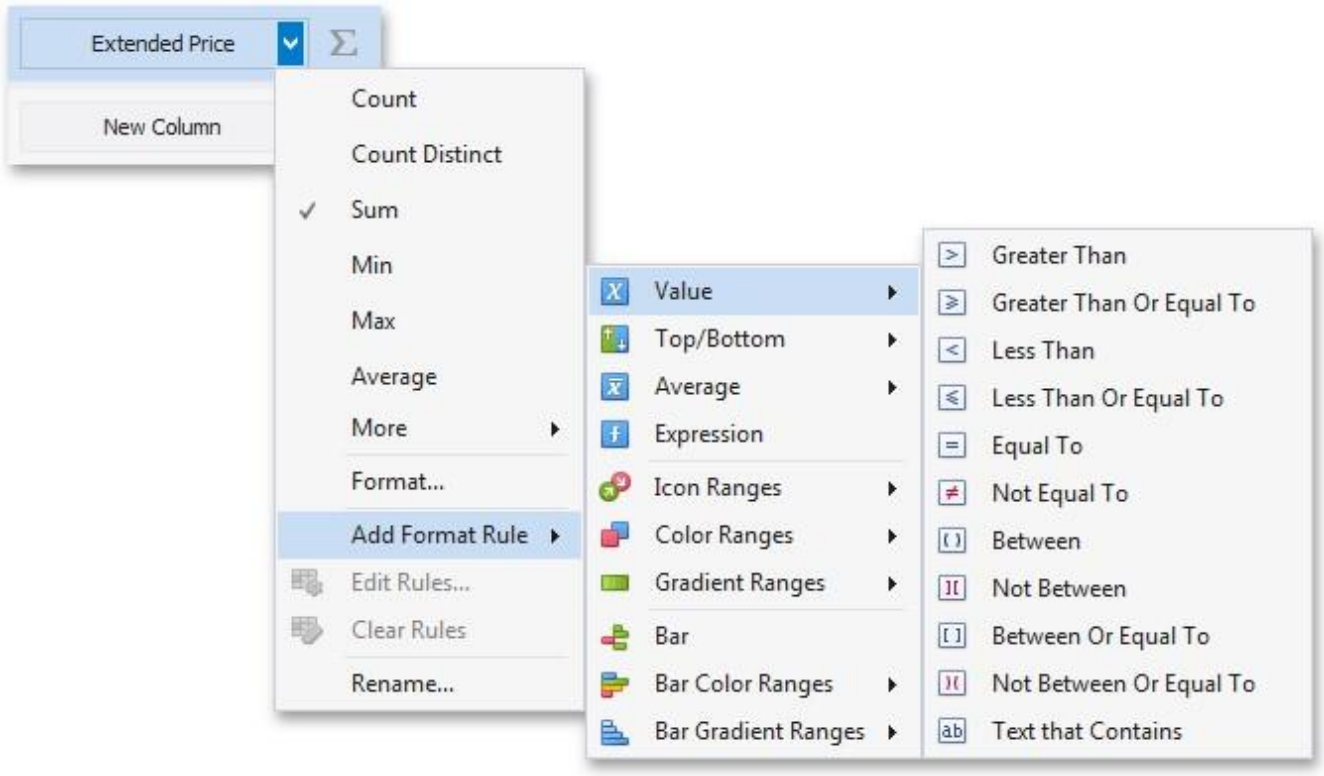
Note that you can use hidden measures to specify a condition used to apply formatting to visible values.

New appearance settings are applied to grid cells corresponding to the target dimension/measure values.

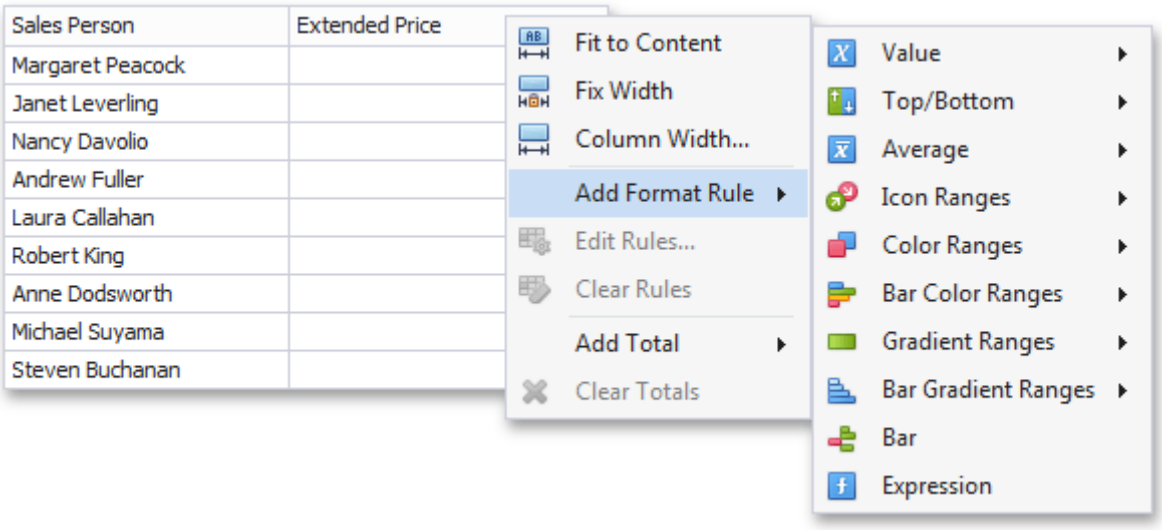
Create a Format Rule

To create a new format rule for the Grid's dimension/measure, do one of the following.

Click the Options button next to the required measure/dimension, select Add Format Rule and choose the condition.

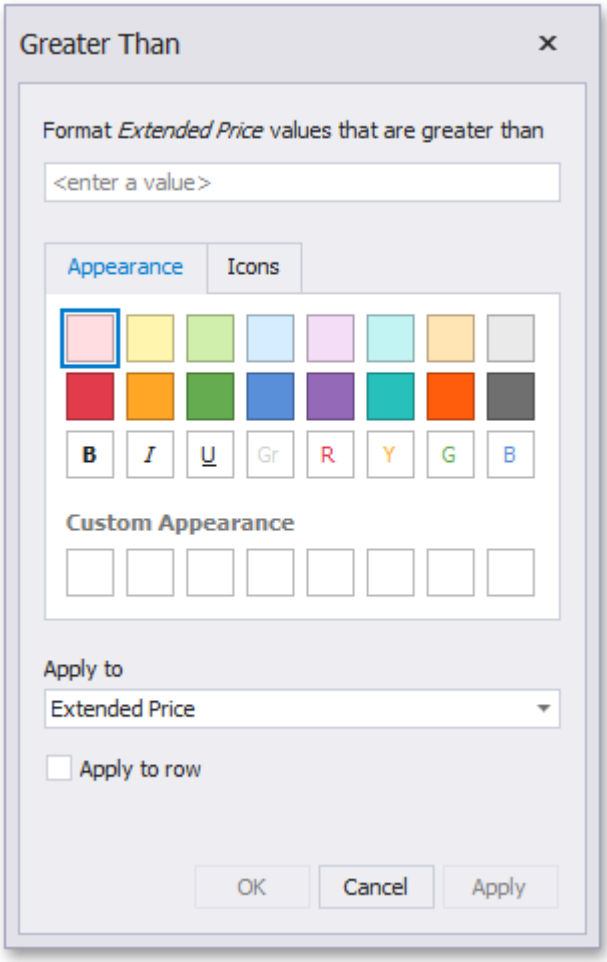


Right-click the column header corresponding to the required measure/dimension and select **Add Format Rule.**



- Use the Edit Rules dialog.

Depending on the selected format condition, the dialog used to create a format rule for Grid contains different settings. For instance, the image below displays the Greater Than dialog corresponding to the Value format condition.



The Apply to row check box allows you to specify whether to apply the formatting to the entire grid row.

Edit a Format Rule

To edit format rules for the current Grid dashboard item, use the following options.

Click the Edit Rules button in the Home ribbon tab or use corresponding item in the Grid context menu.

Click the menu button for the required data item and select Edit Rules. As an alternative, right-click the column header corresponding to the required data item and select Edit Rules.

All of these actions invoke the Edit Rules dialog containing existing format rules. To learn more, see Conditional Formatting.

Totals

The Grid dashboard item enables you to add a summary value (a total) calculated against displayed values of an individual column, and show the result under this column. Note that you can add any number of totals for each column. For example, you can obtain the number of column records, average or maximum value, etc.

Category	Extended Price (Sum)	Discount (Average)
Beverages	$268K	6.19 %
Condiments	$106K	5.26 %
Confections	$167K	5.69 %
Dairy Products	$235K	5.34 %
Grains/Cereals	$95.7K	4.53 %
Meat/Poultry	$163K	6.45 %
Produce	$100K	4.54 %
Seafood	$131K	6.02 %
Count = 8	Max = $268K	Avg = 5.50 %
	Sum = $1.27M	

Totals

This topic describes how to create, edit or clear totals. The topic consists of the following sections.

- Totals Overview
- Create and Edit
- Totals Clear
  Totals

Totals Overview

You can use the following summary functions when creating totals.

- **Count** - The number of records.
- **Sum** - The sum of the values.

$$Sum = \sum_i v_i$$

- **Min** - The smallest value.
- **Max** - The largest value.
- **Average** - The average of the values.

$$\bar{v} = \frac{1}{n} \cdot \sum_i v_i$$

- **Auto** - The total is calculated using the type of summary function specified for the measure corresponding to the current Grid column. Note that in this case, the total is calculated based on values of the corresponding data field from the underlying data source.

You can create totals using different sets of summary functions. This depends on the type of the data source field providing data for the target column.

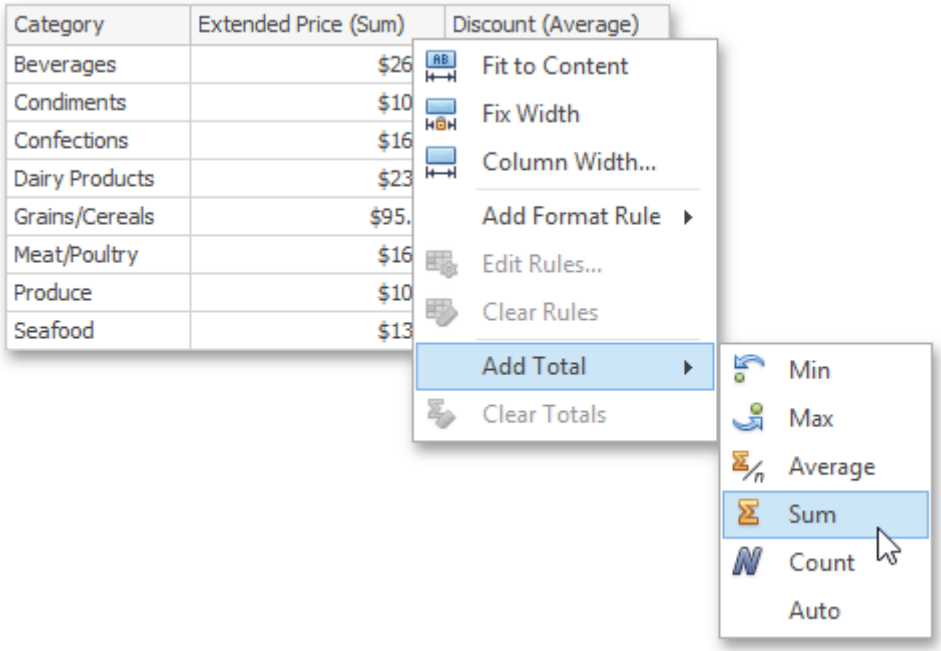
Icon	Data Source Field Type	Supported Totals
	Boolean	Count
	Byte	Count
	Date-time	Min, Max, Count
	Numeric	All available types
	String	Min, Max, Count

Important

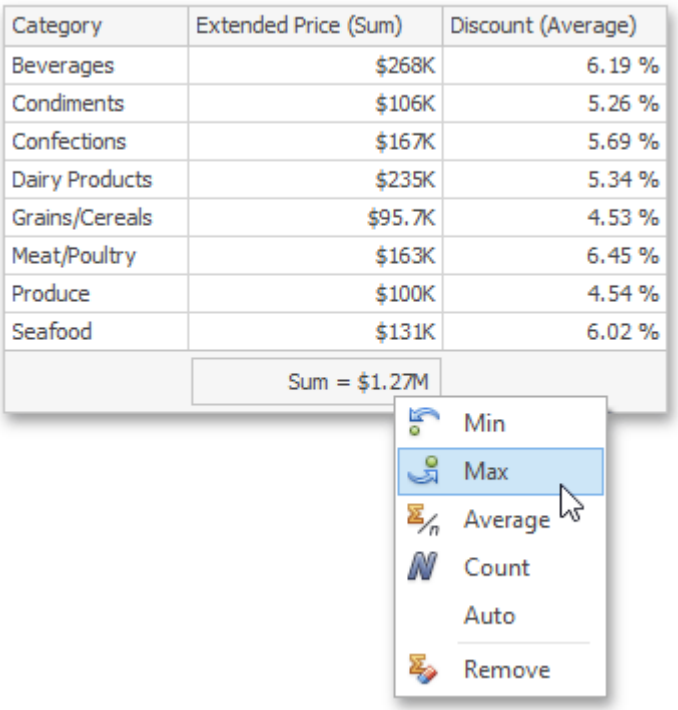
Note that the **Auto** type is available only for the Measure column.

Create and Edit Totals

To create a total, use the context menu of the column header. Right-click the required column header, select Add Total and specify the type of summary function used to calculate a total.



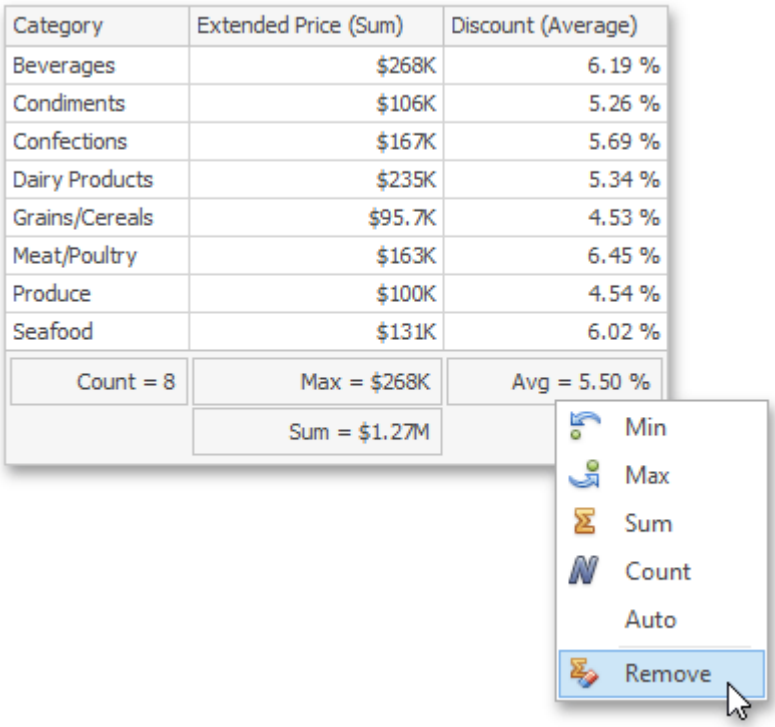
To change the total type, right-click the required total and select a new total type.



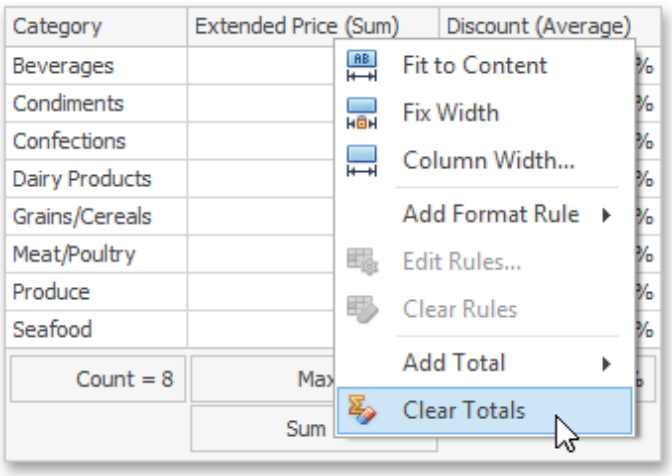
Clear Totals

You can delete one total or all the totals in a particular column.

- To delete a single total, right-click a total and select **Remove**.



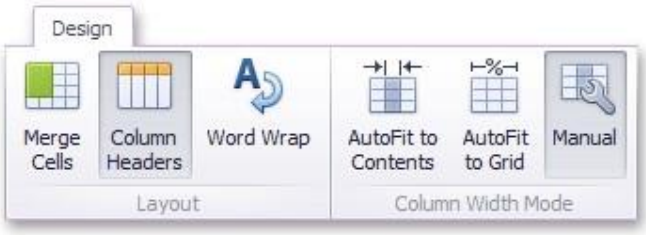
To delete all column totals, right-click the column header and select Clear Totals in the invoked context menu.


Category
Extended Price (Sum)
Discount (Average)
Beverages
Condiments
Confections
Dairy Products
Grains/Cereals
Meat/Poultry
Produce
Seafood
Count = 8
Max
Sum
Fit to Content
Fix Width
Column Width...
Add Format Rule
Edit Rules...
Clear Rules
Add Total
Clear Totals

Layout

The Grid dashboard item allows you to customize its layout in various ways. You can manage the width of grid columns, specify the visibility of column headers, enable cell merging, etc.

To do this, use the Layout and Column Width Mode groups in the Design Ribbon tab.



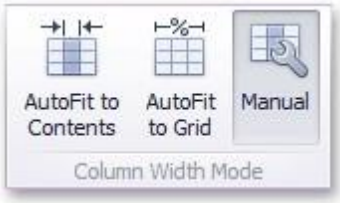
Column Width Modes Column Header

Cell Merging

Word Wrapping

Column Width Modes

The Grid dashboard item allows you to manage column widths using different modes. Use buttons in the Column Width Mode group to manage the column width modes.

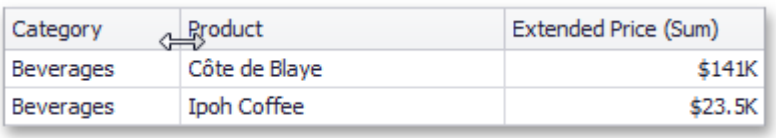


The following modes are available.

- AutoFit to Contents
- The grid adjusts columns to the minimum width required to completely display their content automatically. If the entire content cannot be displayed within the dashboard item, horizontal scrolling is enabled..
- AutoFit to Grid
- The grid adjusts the width of all columns to fit their content in an optimal way. If you are changing the size of the dashboard item, the width of columns is changed proportionally..
- Manual
- The grid allows you to adjust column widths manually.

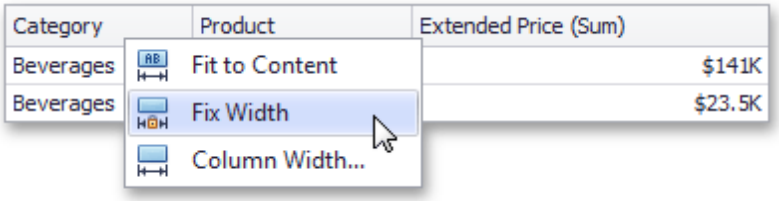
In this mode, you can adjust the width of individual columns in the following ways.

Specify the width of the required column by dragging the right edge of the column header.

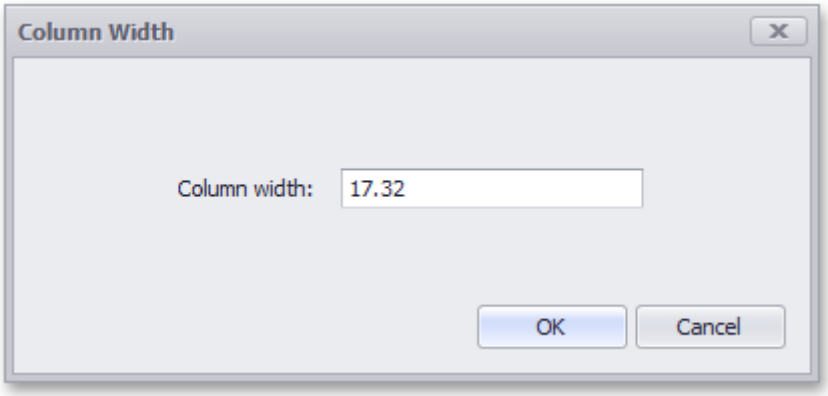


In this case, all columns preserve their relative size when the grid width is changed.

Specify the column width and fix it by right-clicking the required column header and selecting Fix Width.



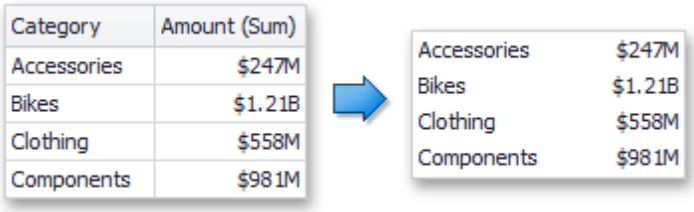
You can also specify the fixed column width by selecting Column Width... This invokes the Column Width window that allows you to specify the width of the column in characters.



Fit the column width to its content and fix it by right-clicking the required column header and selecting Fit to Content.

Column Header

Use the Column Headers button to toggle column header visibility.



Cell Merging

The Grid allows you to merge neighboring cells with identical values . To do this, use the Merge Cells button.

Category	Product	Extended Price (Sum)
Beverages	Côte de Blaye	$141K
Beverages	Ipoh Coffee	$23.5K
Confections	Tarte au sucre	$47.2K
Confections	Sir Rodney's Marmalade	$22.6K
Confections	Gumbär Gummibärchen	$19.8K

Category	Product	Extended Price (Sum)
Beverages	Côte de Blaye	$141K
	Ipoh Coffee	$23.5K
Confections	Tarte au sucre	$47.2K
	Sir Rodney's Marmalade	$22.6K
	Gumbär Gummibärchen	$19.8K

Note

Note that banded rows are not available when cell merging is enabled.

Word Wrapping

The word wrapping feature enables the capability to display cell content on multiple lines if the size of a dashboard item is insufficient to completely display the cell content on a single line.

Category	Product	Extended Price (Sum)
Beverages	Côte de Blaye	$141K
Beverages	Ipoh Coffee	$23.5K

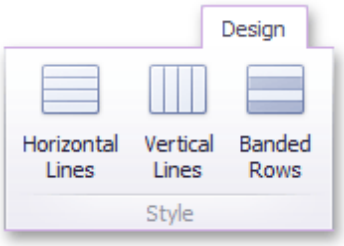
Category	Product	Extended Price (Sum)
Beverages	Côte de Blaye	$141K
Beverages	Ipoh Coffee	$23.5K

Note

The word wrapping feature is not in effect when the **AutoFit to Contents** column width mode is enabled.

Style

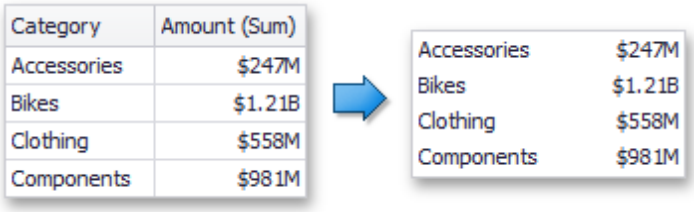
The Grid dashboard item allows you to specify various style settings. To do this, use the Style group in the Design Ribbon tab.



- Grid
- Lines
  Banded
  Rows

Grid Lines

The Horizontal Lines and Vertical Lines buttons control grid line visibility.



Category	Amount (Sum)
Accessories	$247M
Bikes	$1.21B
Clothing	$558M
Components	$981M

Accessories	$247M
Bikes	$1.21B
Clothing	$558M
Components	$981M

Banded Rows

To paint the background of odd and even rows differently, use the Banded Rows button.

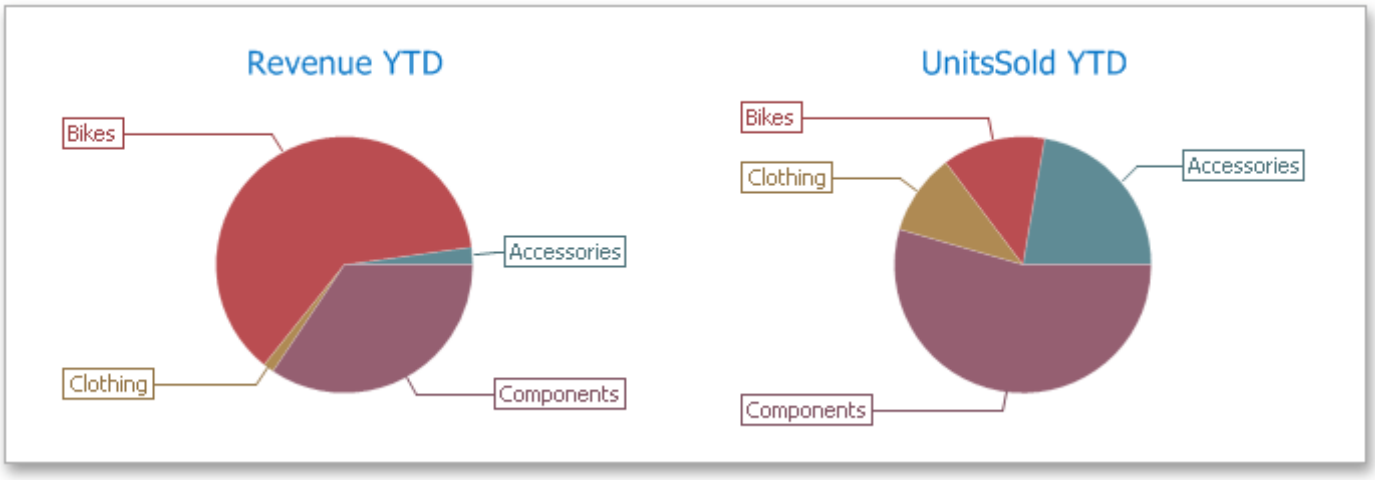
Category	Product	Extended Price (Sum)
Beverages	Côte de Blaye	$141K
Beverages	Ipoh Coffee	$23.5K
Confections	Tarte au sucre	$47.2K
Confections	Sir Rodney's Marmalade	$22.6K
Confections	Gumbär Gummibärchen	$19.8K

Note

Note that banded rows are not available when cell merging is enabled.

Pies

The Pie dashboard item displays a series of pies or donuts that represent the contribution of each value to a total.



This section consists of the following subsections:

Providing Data

Describes how to supply the Pie dashboard item with data.

Interactivity

Describes features that enable interaction between the Pie dashboard item and other items.

Coloring

Describes coloring capabilities of the Pie dashboard item.

Layout

Describes layout options of the Pie dashboard item.

Labels

Explains how to customize data labels and tooltips.

Style

Describes how to select the style of pie charts.

Providing Data

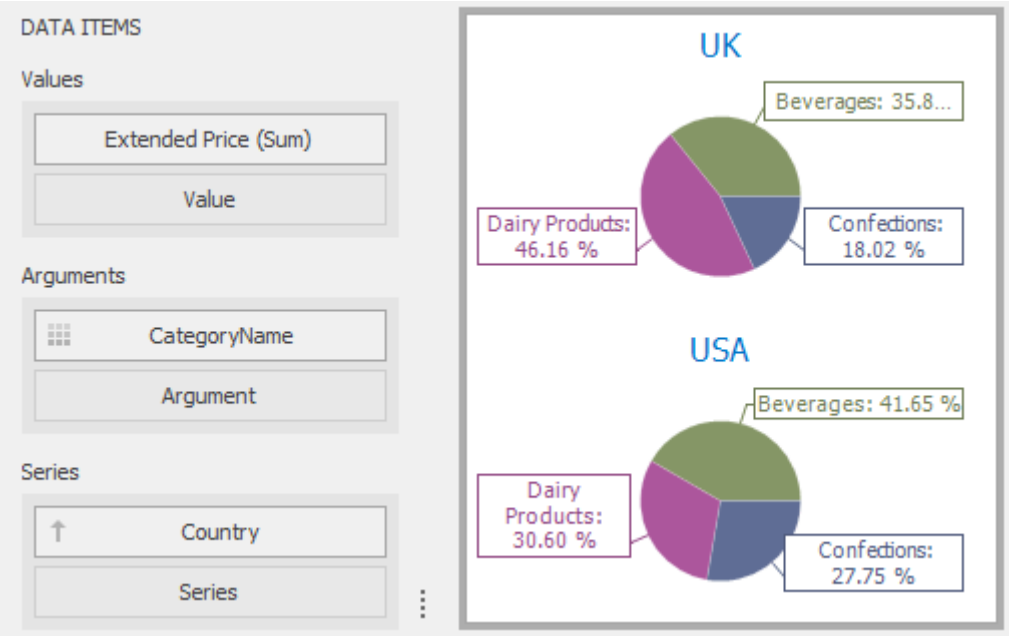
The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic.

The only difference is in the data sections that the required dashboard item has. This topic describes how to bind a Pie dashboard item to data in the Designer.

Binding to Data in the Designer Transposing Arguments and Series

Binding to Data in the Designer

The image below shows a sample Pie dashboard item that is bound to data.

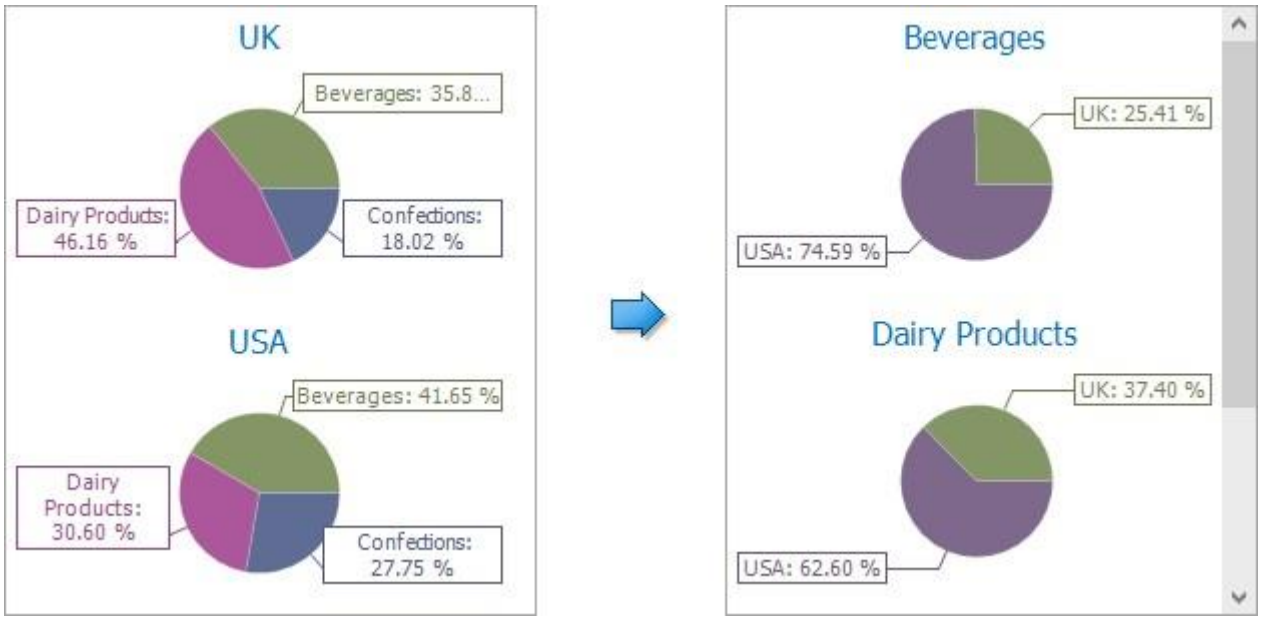


To bind the Pie dashboard item to data, drag and drop a data source field to a placeholder contained in one of the available data sections. A table below lists and describes Pie's data sections.

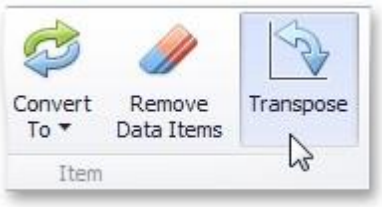
Section	Description
Values	Contains data items that define the share of pie segments. In case of negative measure values, Pie uses their absolute values.
Arguments	Contains data items that provide values used to label pie segments.
Series	Contains data items whose values are used to label pie charts.

Transposing Arguments and Series

The Pie dashboard item provides the capability to transpose pie arguments and series. In this case, data items contained in the Arguments section are moved to the Series section, and vice versa.



To transpose the selected Pie dashboard item, use the Transpose button in the Home ribbon tab.



Interactivity

This section describes features that enable interaction between the Pie dashboard item and other items. These features include Master Filtering and Drill-Down.

The section contains the following topics.

- Master
- Filtering
  Drill-Down

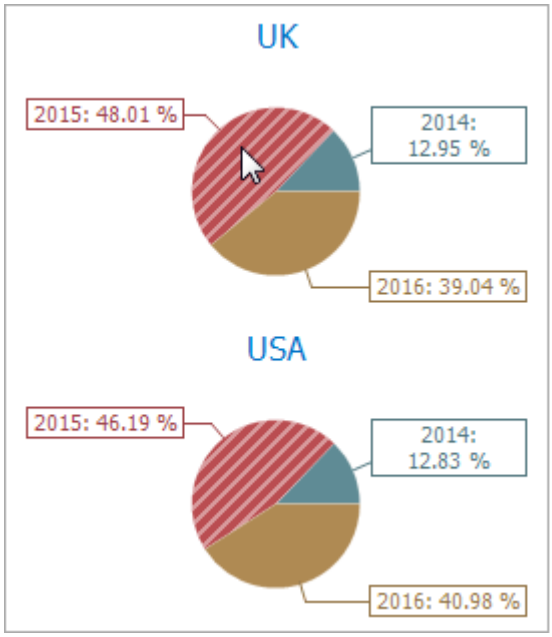
Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

The Pie dashboard item supports filtering by argument or series values.

Filtering by Arguments

When filtering by arguments is enabled, you can click a pie segment to make other dashboard items only display data related to the selected argument value.



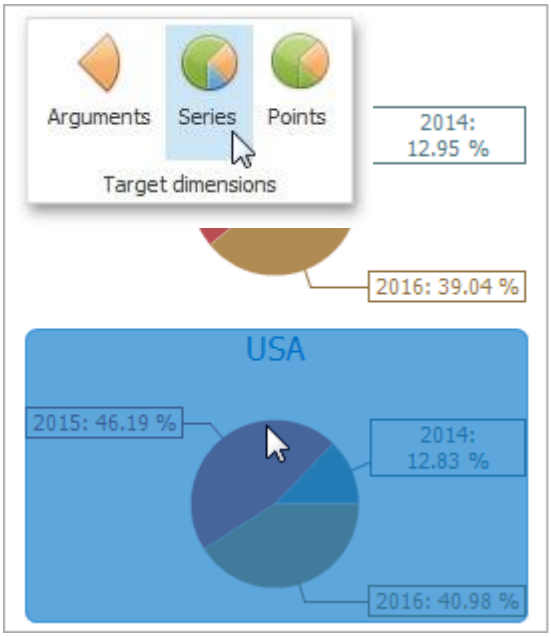
Year	Quarter	Country	Extended Price
2015	Q1	UK	$34.3K
		USA	$111K
	Q2	UK	$35.1K
		USA	$110K
	Q3	UK	$40.7K
		USA	$93.9K
	Q4	UK	$55.3K
		USA	$111K

To enable filtering by arguments in the Designer, set the required Master Filter mode and click the Arguments button in the Data Ribbon tab (or the button if you are using the toolbar menu).

Filtering by Series

When filtering by series is enabled, you can click a pie to make other dashboard items display only data related to the selected pie.

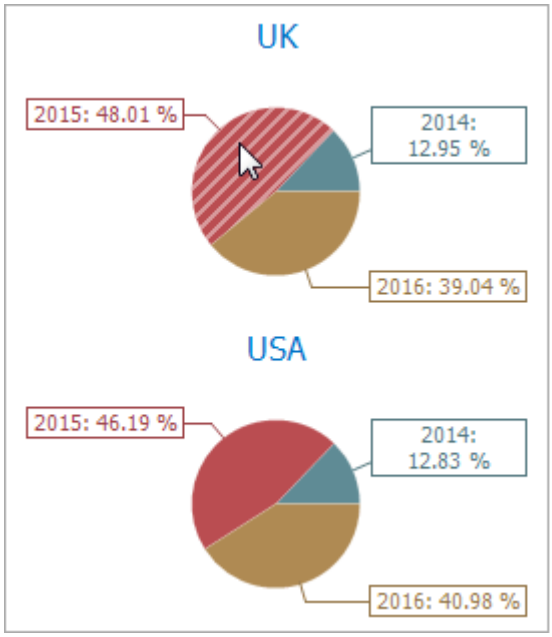
To enable filtering by series in the Designer, set the required Master Filter mode and click the Series button in the Data Ribbon tab (or the button if you are using the toolbar menu).



Year	Quarter	Country	Extended Price
2014	Q3	USA	$41.8K
	Q4		$76.5K
2015	Q1		$111K
	Q2		$110K
	Q3		$93.9K
	Q4		$111K
2016	Q1		$196K
	Q2		$182K

Filtering by Points

When filtering by points is enabled, you can click a single pie segment to make other dashboard items display only data related to the selected segment.



Year	Quarter	Country	Extended Price
2015	Q1	UK	$34.3K
	Q2		$35.1K
	Q3		$40.7K
	Q4		$55.3K

To enable filtering by points in the Designer, set the required Master Filter mode and click the Points button in the Data Ribbon tab.

Reset Filtering

To reset filtering, use the Clear Master Filter button (the icon) in the caption area of the Pie dashboard item, or the Clear Master Filter command in the Pie's context menu.

Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more about drill-down concepts common to all dashboard items, see the Drill-Down topic.

The Pie dashboard item supports drill-down on argument or series values.

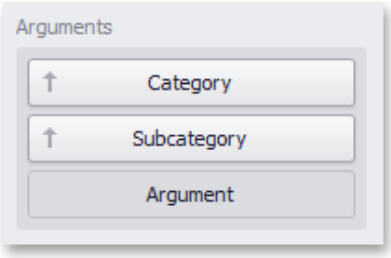
Drill Down on an Argument

When drill down on an argument is enabled, you can click a pie segment to view a detail diagram for the corresponding argument value.

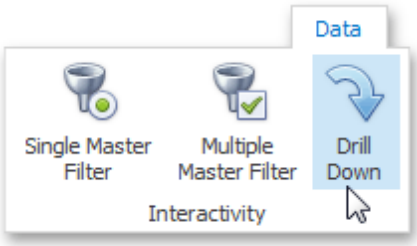
Note

When Filtering by Arguments is enabled, you can view the details by double-clicking a pie segment.

Drill down on an argument requires that the Arguments section contains several data items, from the least detailed to the most detailed item.



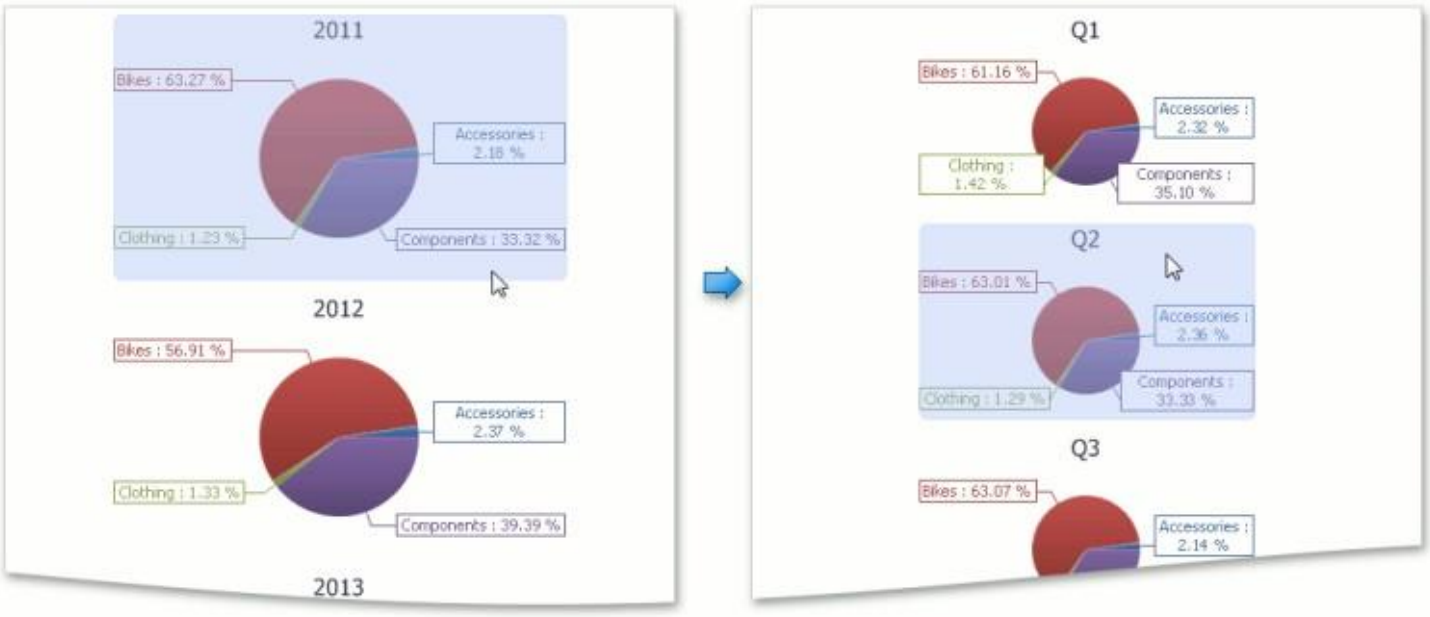
To enable drill down on an argument, click the Drill Down button in the Data Ribbon tab (or the button if you are using the toolbar menu)...



...and the Arguments button (or the button if you are using the toolbar menu).

Drill Down on a Series

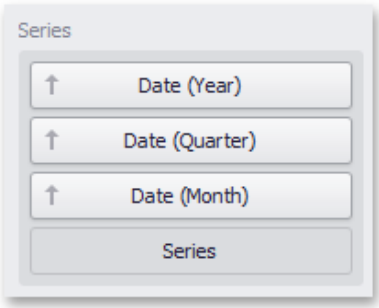
When drill down on a series is enabled, you can click a pie chart to view a detail diagram for the corresponding series value.



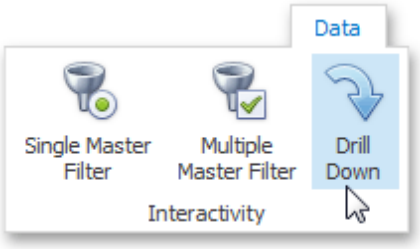
Note

When Filtering by Series is enabled, you can view the details by double-clicking a pie chart.

Drill down on a series requires that the Series section contains several data items, from the least detailed to the most detailed item.



To enable drill down on a series, click the Drill Down button in the Data Ribbon tab (or the button if you are using the toolbar menu)...



...and the **Series** button (or the button if you are using the toolbar menu).

Drill Up

To return to the previous detail level (drill up), use the Drill Up button (the icon) in the caption area of the Pie dashboard item, or the Drill Up command in the context menu.

Coloring

Certain dashboard items provide the capability to color dashboard item elements by associating dimension values/ measures and specified colors. You can choose whether to use a global color scheme to provide consistent colors for identical values or specify a local color scheme for each dashboard item. To learn more about coloring concepts common for all dashboard items, see the Coloring section.

By default, the Pie dashboard item colors its segments in the following way.

If the Pie dashboard item contains measures (the Values section) and series dimensions (the Series

section), only values corresponding to different measures are colored by hue.

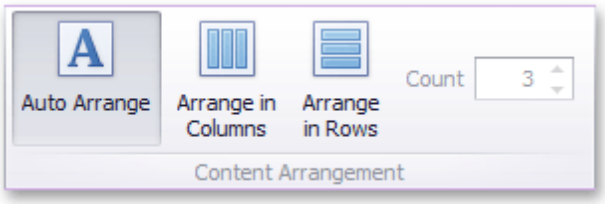
If the Pie dashboard item contains arguments (the Arguments section), different argument values are colored by hue.

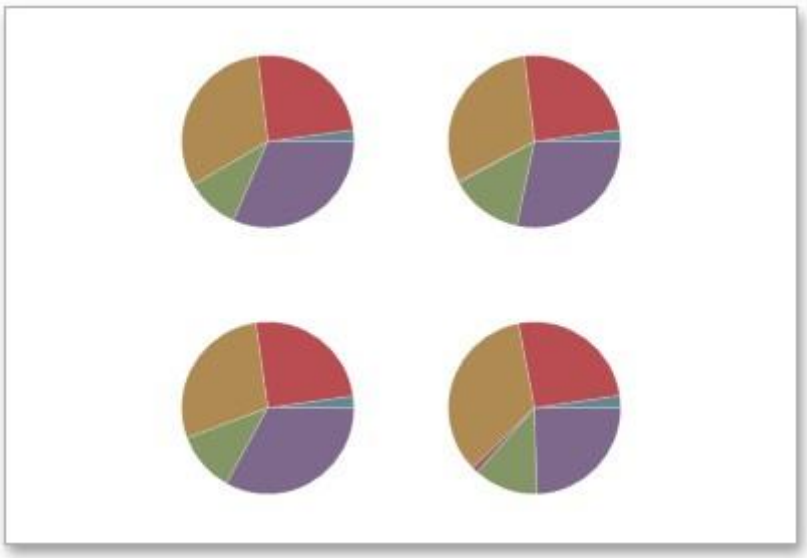
If necessary, you can change the default behavior. For instance, the image below shows the Pie dashboard item whose measures and argument values are colored by hue.

Layout

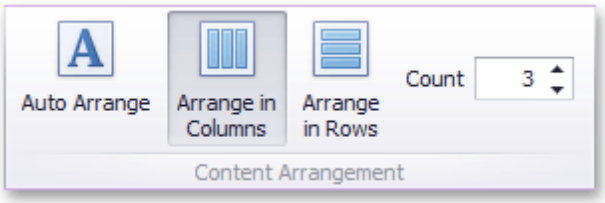
The Pie dashboard item allows you to specify the number of columns or rows in which individual diagrams are arranged.

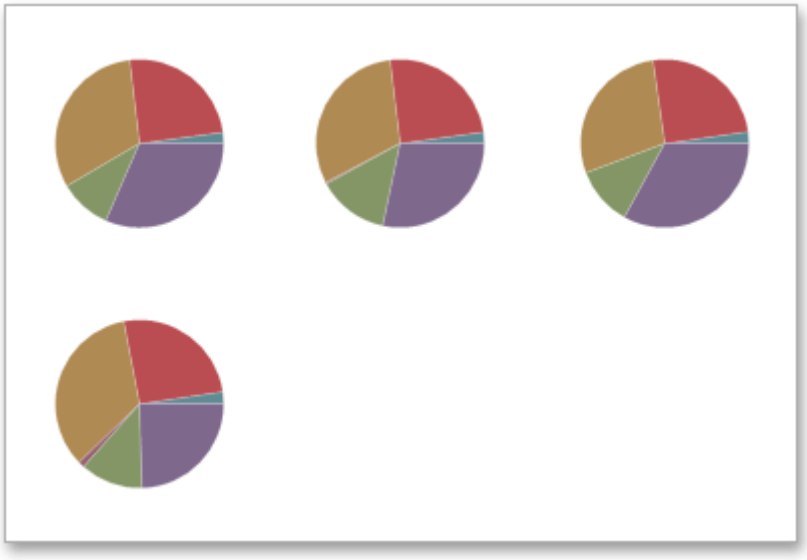
To control how pies are arranged, use the buttons in the Content Arrangement group of the Design Ribbon tab. By default, the Auto Arrange option is enabled, which automatically resizes pies to fit within the dashboard item.



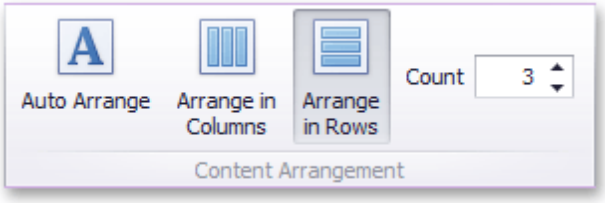


You can also specify the number of columns in which pies are arranged. Click the Arrange in Columns button and specify the appropriate number in the Count field.

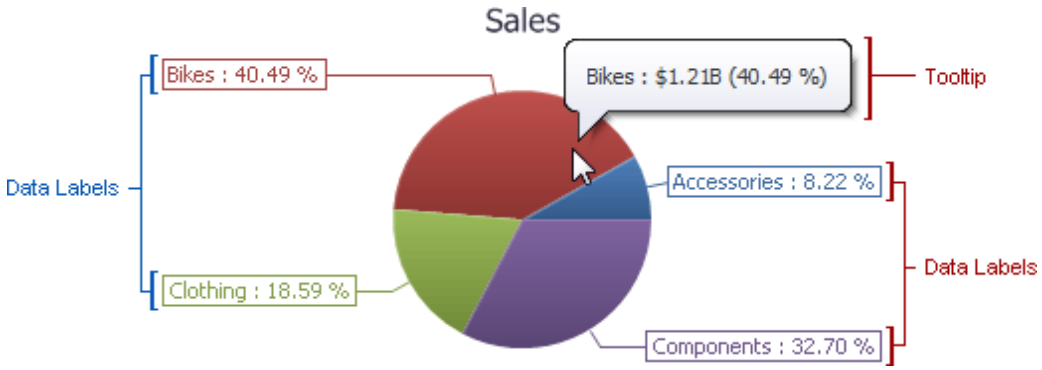




Similarly, you can arrange pies in a specific number of rows.

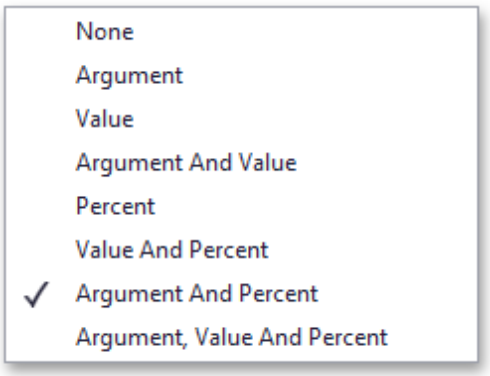


Labels



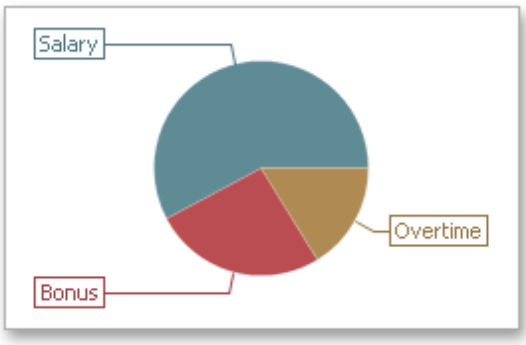
You can specify which information should be displayed within data labels and tooltips. To do this, use the Data Labels and Tooltips buttons in the Labels group of the Design Ribbon tab.

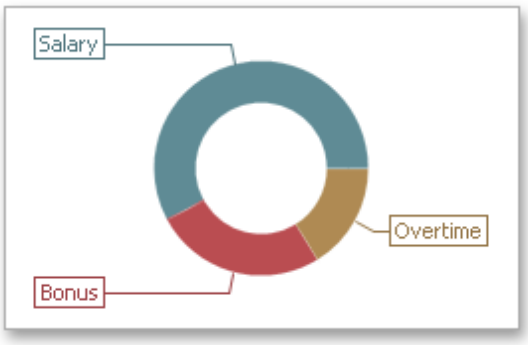
These buttons invoke a drop-down menu that is similar for both buttons. This menu allows you to specify which values are displayed within data labels or tooltips.



Style

The Pie dashboard item allows you to select whether diagrams should be painted as pies or donuts.

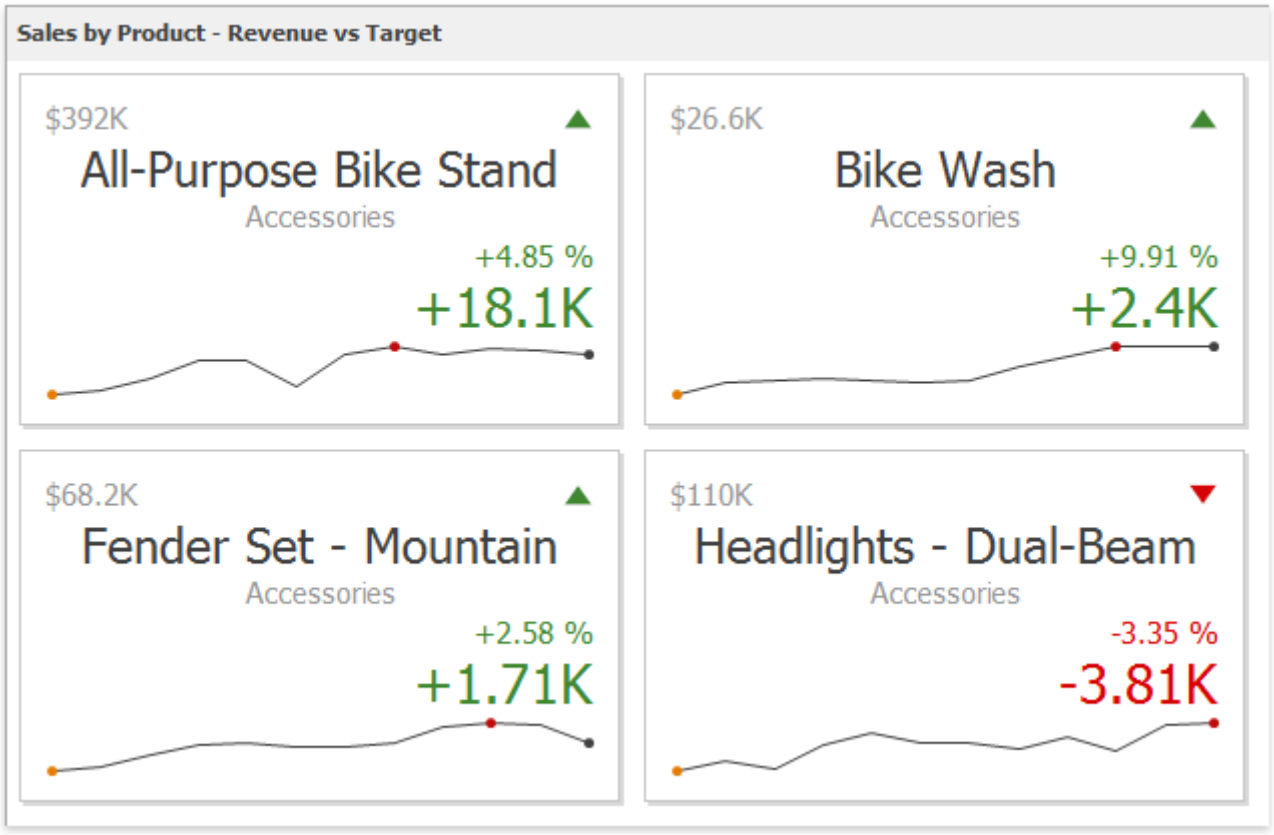




To select the diagram style, use the Pie and Donut buttons in the Style section of the Design Ribbon tab.

Cards

The Card dashboard item displays a series of cards. Each card illustrates the difference between two values. This difference can be expressed as an absolute value, an absolute variation or a percentage variation.



This section consists of the following

- subsections: Providing Data
  Provides information about how to supply the Card dashboard item with data.
- Layout
  Describes how to manage the position and visibility of elements within a card.
- Delta
  Provides an overview of the Card dashboard item's capability to display the difference between two parameters.
- Sparkline
  Provides an overview of the Card dashboard item's capability to visualize data using sparklines.
- Formatting
  Shows how to format values displayed within a card.
- Interactivity
  Describes features that enable interaction between the Card dashboard item and other items.
- Cards Arrangement
  Describes how to arrange cards within the Card dashboard item.

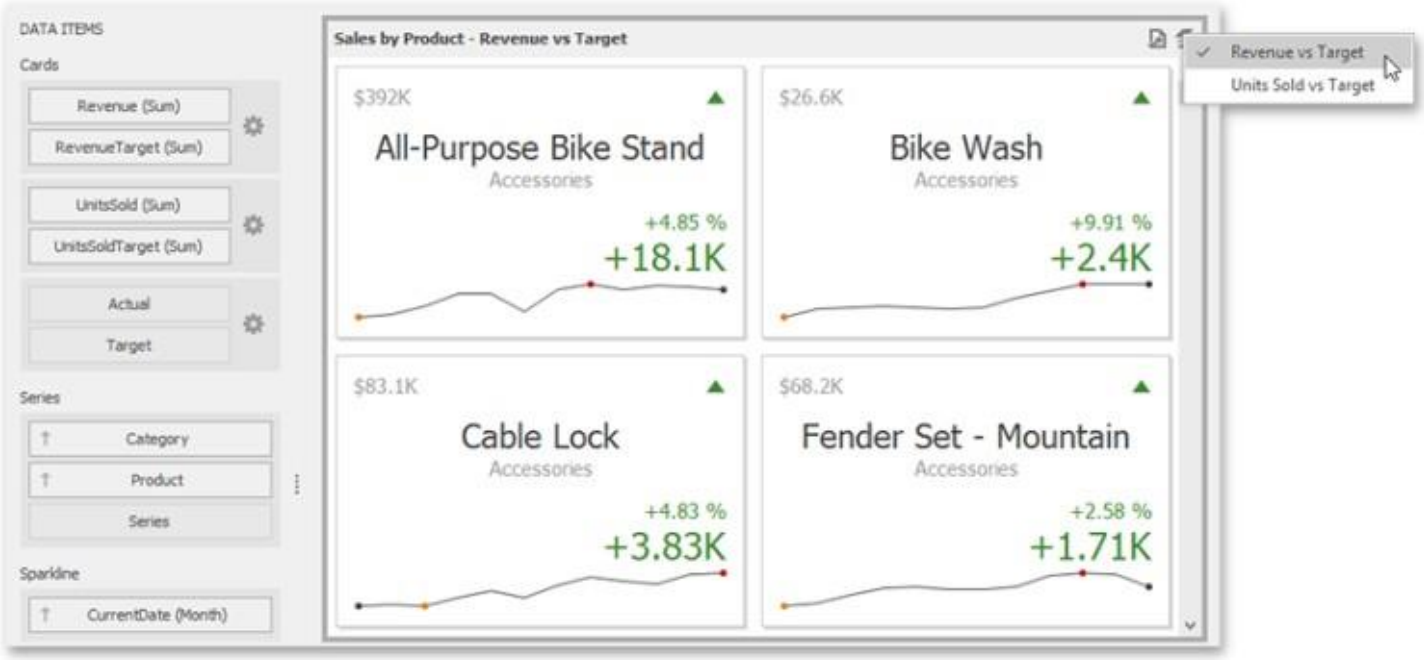
Providing Data

The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic.

The only difference is in the data sections that the required dashboard item has. This topic describes how to bind a Card dashboard item to data in the Designer.

Binding to Data in the Designer

The image below shows a sample Card dashboard item that is bound to data.



To bind the Card dashboard item to data, drag and drop a data source field to a placeholder contained in one of the available data sections. A table below lists and describes Card data sections.

Section	Description
Cards	Contains data items used to calculate values displayed within cards. Data items are arranged in containers. Each data item container can hold two data items. The first item contains actu al data and the second item (optional) contains target data. If both items are provided, cards show the difference between actual and target values. You can fill several data item containers in the Cards section and use the **Values** drop-down menu to switch between the provided values. To invoke the **Values** menu, click the icon in the dashboard item caption or use its context menu. This drop-down menu is available if the Series section is not empty. Otherwise, a separate card is created for each data item container, and all cards are displayed simultaneously.
Series	Contains data items whose values are used to label cards.
Sparkline	Provide a dimension whose data will be used to visualize values using sparklines

Layout

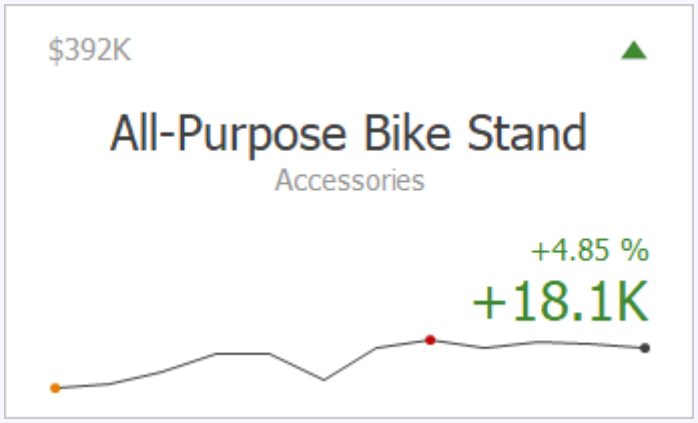
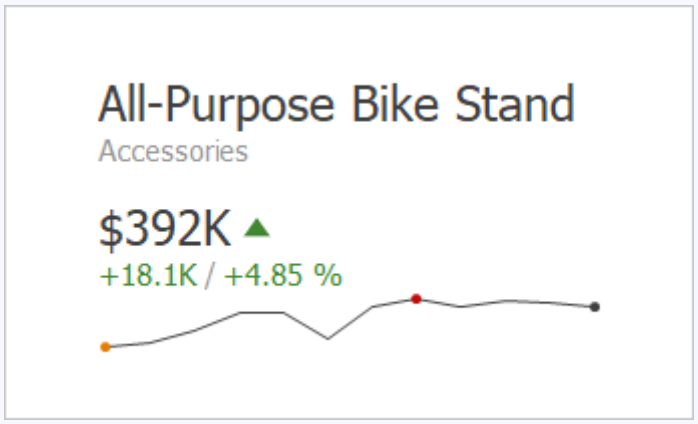
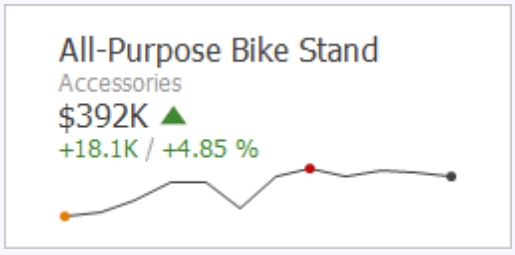
The Card dashboard item allows you to manage the position and visibility of elements displayed on cards. These elements include actual and target values, a delta indicator and corresponding delta values, a sparkline, etc.

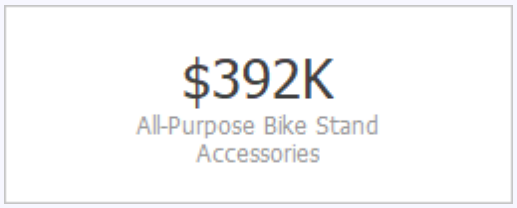
To manage the position and visibility of card elements, choose a predefined layout template and customize its settings.

- Available Layout
- Templates Default Layout
- Change Layout

Available Layout Templates

The table below contains information about the available layout templates:

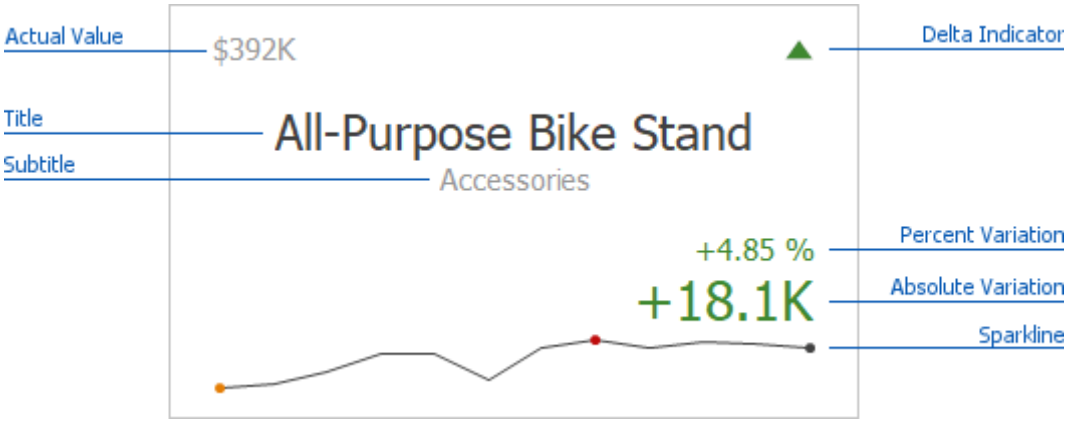
Layout Type	Example	Description
Stretched		The Stretched layout template arranges card elements so that they occupy an entire card area.
Centered		The Centered layout template is used to center card elements so that they occupy a specified width/ height.
Compact		The Compact layout template is used to arrange card elements so that they occupy the minimum area.

Lightweight		The Lightweight layout template displays the minimum set of elements within a card.

For all layout types, you can change the visibility of its elements, or you can specify the display value type for data-bound elements. To learn more, see the Change Layout paragraph below.

Default Layout

The Card dashboard item uses the Stretched layout template that arranges card visual elements in the following way by default:



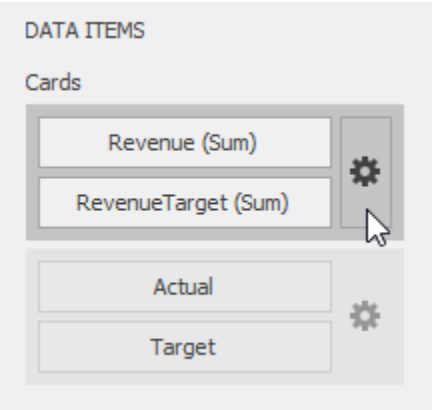
To learn more about the available value types and visual elements, see Change Layout.

Note

Delta Indicator and delta values (such as **Percent Variation** or **Absolute Variation**) are colored depending on delta settings. To learn how to manage delta settings, see Delta.

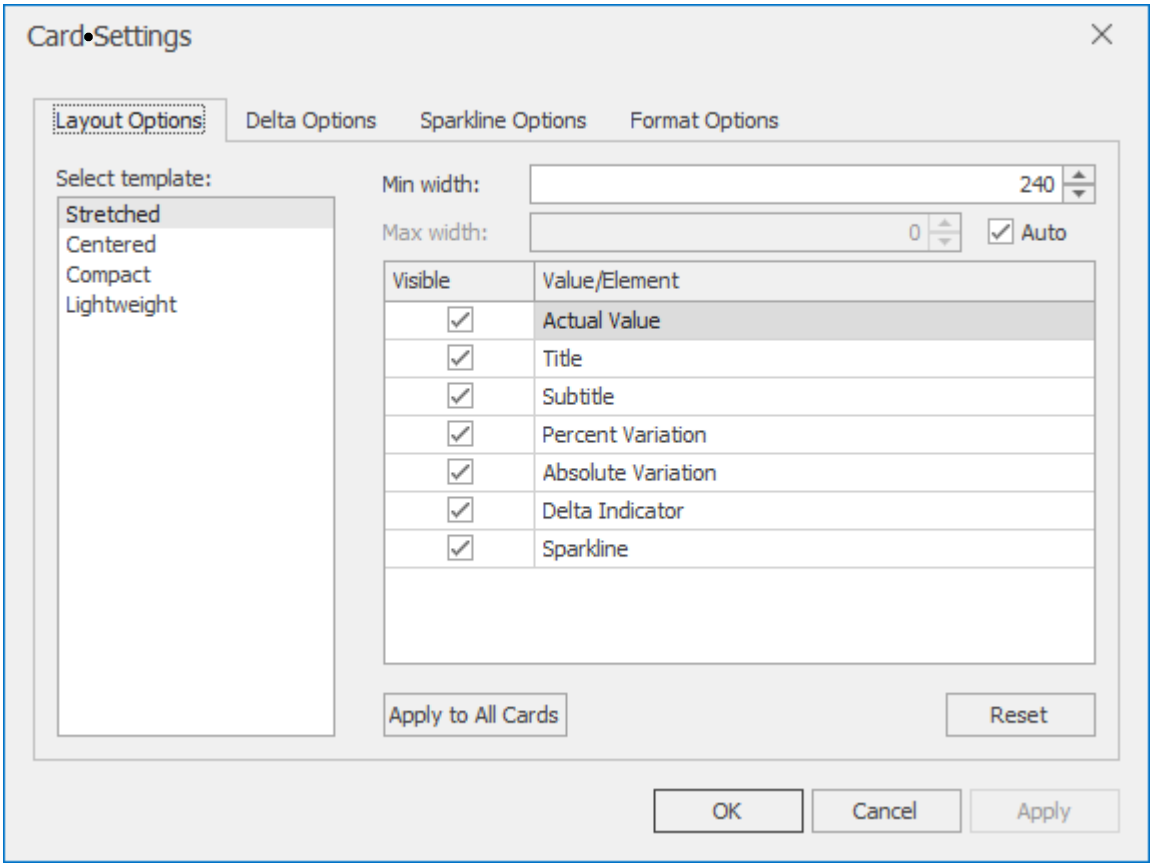
Change Layout

To change a card's layout in the Dashboard Designer, click the Options button (the ⚙ icon) displayed next to the data item container in the Cards section.



This invokes the Card Settings dialog

On the Layout Options tab, select the required layout type in the Select template list and specify its settings:



Min width - Specifies the minimum width of the card content.

Max width - Specifies the maximum width of the card content. Use the Auto option to determine the maximum width automatically.

You can show/hide the following values and visual elements within the card:

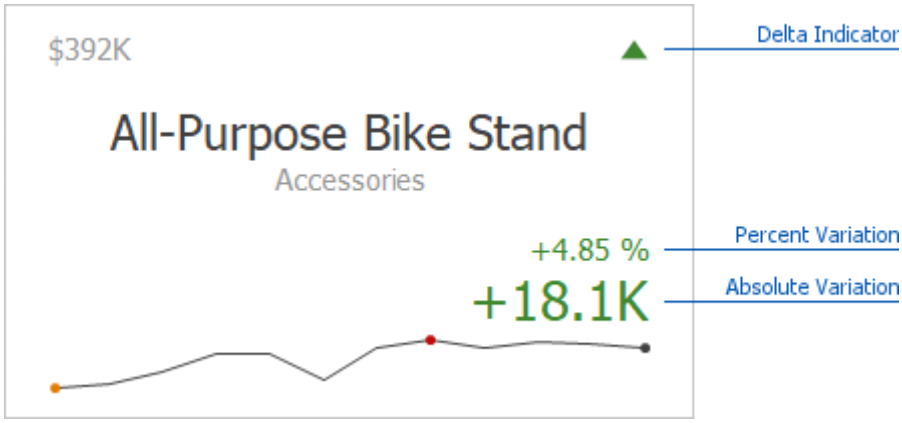
Value	Description	Exanple
Title	Displays values of the last (bottommost) dimension placed in the **Series** section.	M icros oft Office Keyboard
Subtitle	Displays combined values of all dimensions except the last (bottommost) dimension.	Tech n ology - Com pu ter Periph erals
Absolute Variation	An absolute difference between the actual and target value (see Delta).	+1 8 .1 K
Actual Value	A summary value for a measure placed in the **Actual** placeholder.	$ 3 9 2 K
Card Name	A card name.	Reven u e vs . Target
Percent of Target	A percent of a target	1 0 4 .8 5 %

	value (see Delta).	
Percent Variation	A percent difference between the actual and target value (see Delta).	4 .8 5 %
Target Value	A summary value for a measure placed in the **Target** placeholder.	$ 3 7 4 K
Dimension {Name}	Allows you to display values of a specific dimension placed in the **Series** section.	Tech n ology
Element	**Description**	**Example**
Delta Indicator	Indicates whether the actual value is less or greater than the target value (see Delta).	
Sparkline	Visualizes the variation of actual or target values. To learn more, see Sparkline.	

Use the Apply to All Cards button to propagate the specified layout settings to all cards corresponding to Actual- Target pairs. The Reset button resets all setting to their default values.

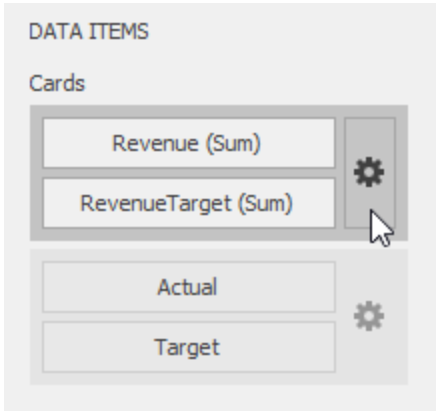
Delta

Cards allow you to visualize the difference between the actual and target values using special delta values and a delta indicator. If the default layout is used (Stretched layout type), the card displays the following delta values/ elements:

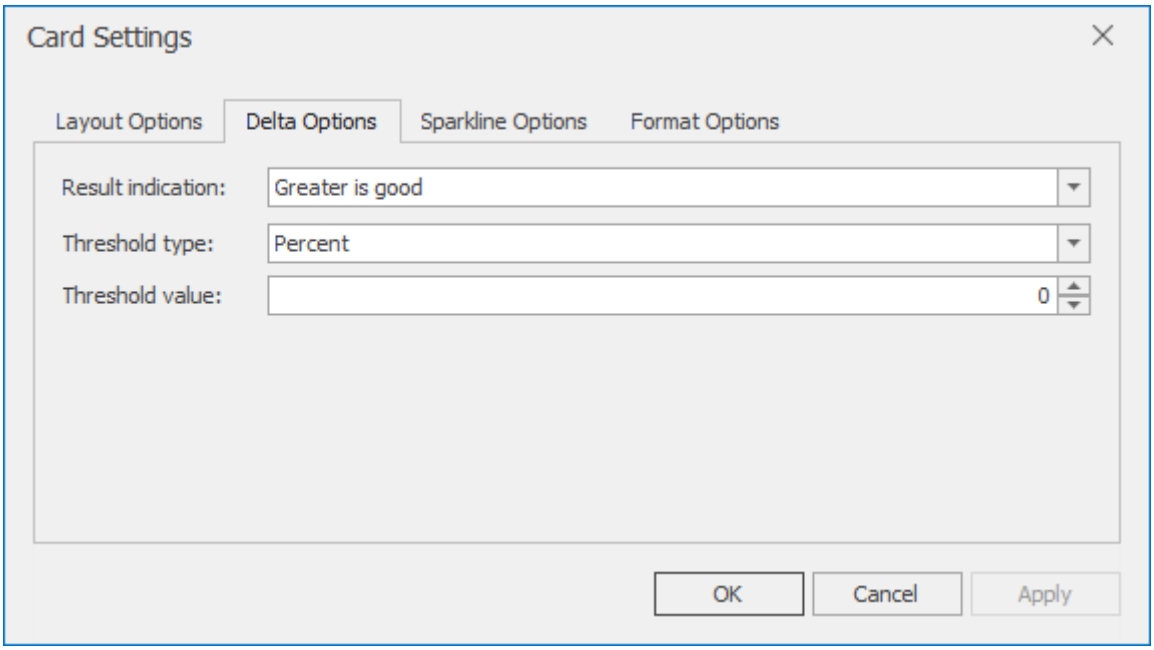


- **Delta Indicator** - Indicates whether the actual value is less or greater than the target value.
- **Percent Variation** and **Absolute Variation** - delta values that show a difference between the actual and target value. You can also display the **Percent of Target** value. To do this, customize the card's layout.

To customize settings that relate to the calculation and display of delta values/elements, use the Options button (the icon) displayed next to the data item container in the Cards section.

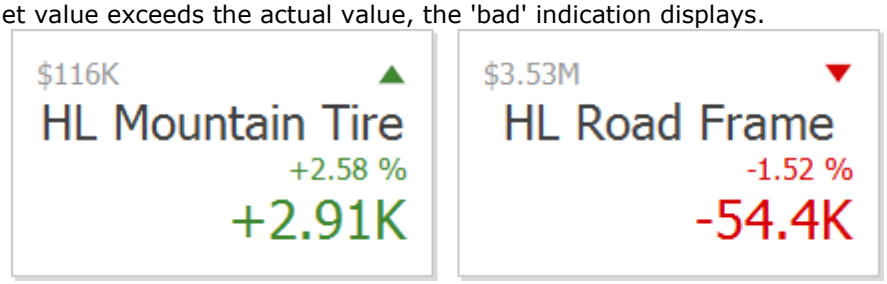


In the invoked Card Settings dialog, go to the Delta Options tab:

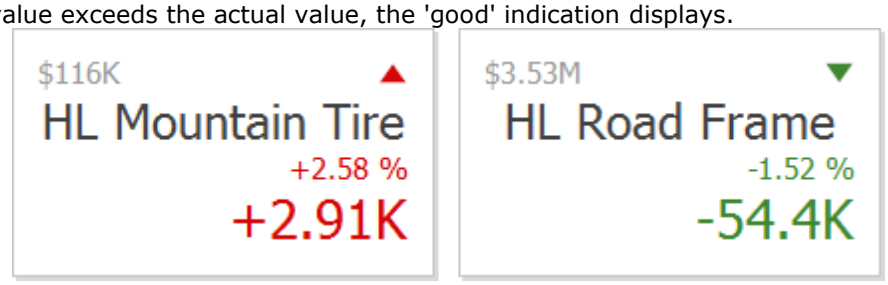


Then, specify the following settings:

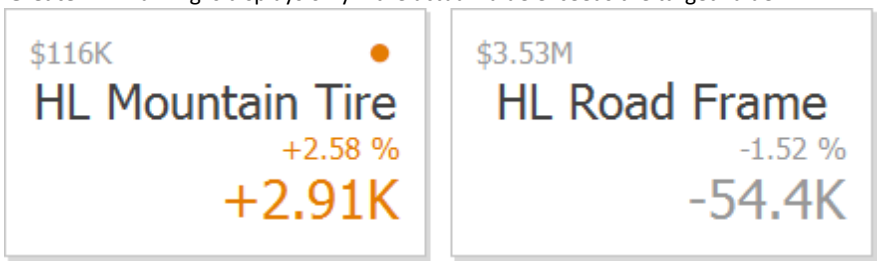
- **Result Indication** - You can specify the condition for displaying delta indication.
  - **Greater is Good** - The 'good' indication is displayed if the actual value exceeds the target value; if the target value exceeds the actual value, the 'bad' indication displays.



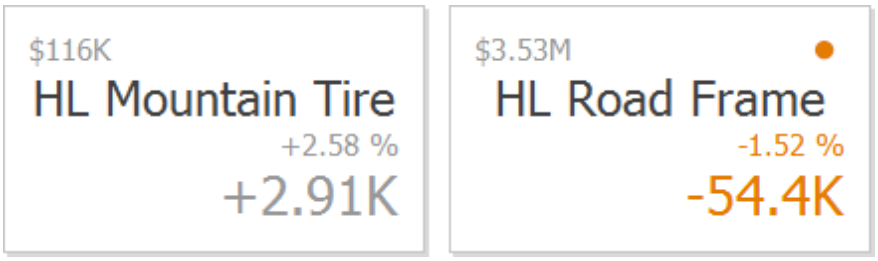
  - **Less is Good** - The 'bad' indication displays if the actual value exceeds the target value; if the target value exceeds the actual value, the 'good' indication displays.



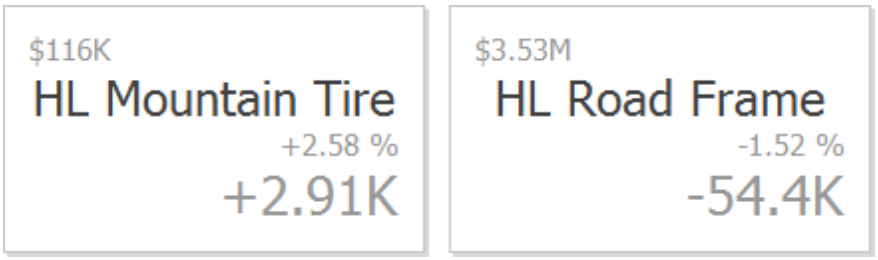
  - **Warning if Greater** - A warning is displays only if the actual value exceeds the target value.



  - **Warning if Less** - A warning is displays only if the target value exceeds the actual value.



No Indication - Indication does not display.

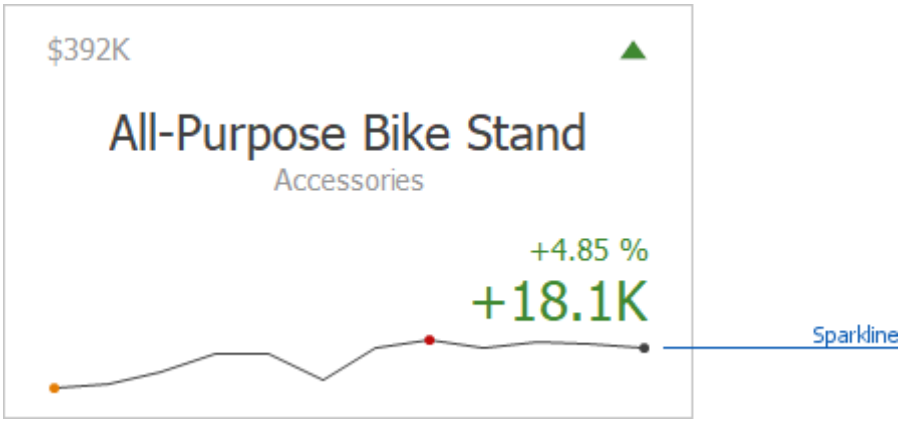


Threshold type / Threshold value - For instance, you can specify that a specific indication should display when the actual value exceeds the target value by 1 0 % or by $ 2 K. Use the Threshold type combo box to select whether you wish to specify the comparison tolerance in percentage values or absolute values.

Then use the Threshold value box to specify the comparison tolerance.

Sparkline

Sparklines can be used to visualize the variation of actual or target values (for instance, over time).

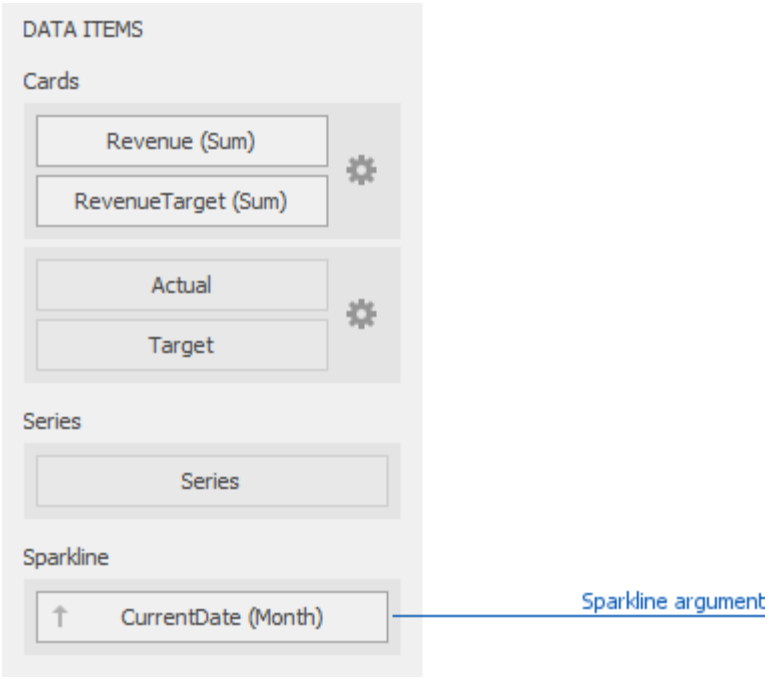


To learn how to display the sparkline for different layout types, see Layout.

- Data Binding Specifics
- Change Sparkline Options

Data Binding Specifics

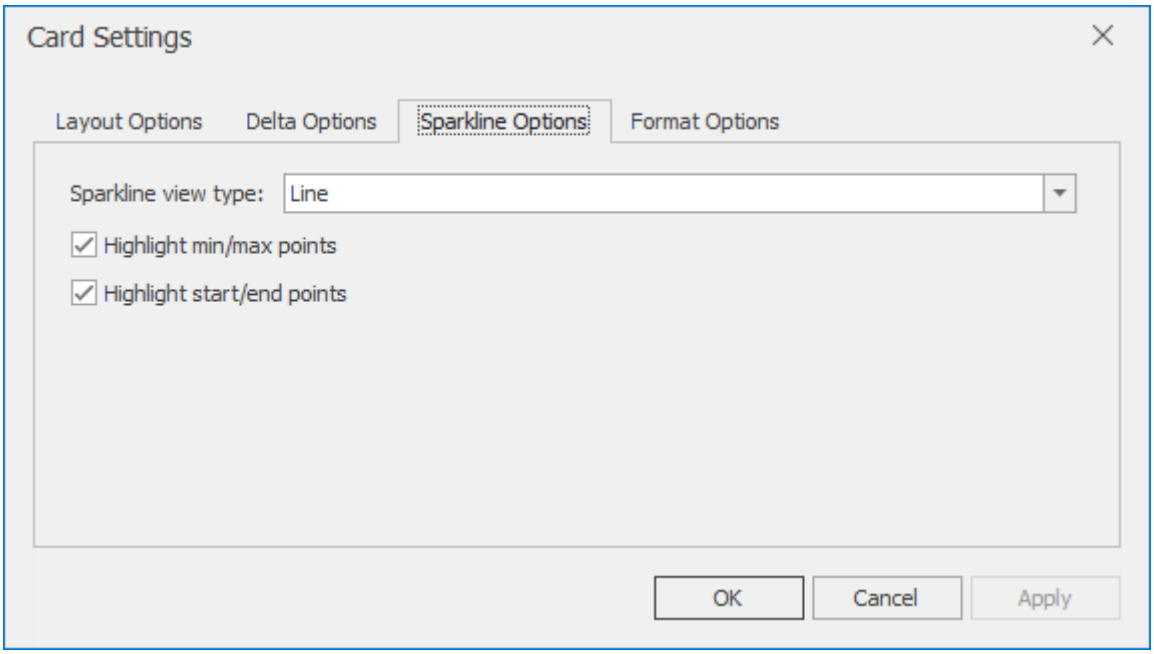
You need to provide a date-time or numeric dimension whose data is used as argument values to display a sparkline within the card.



If you have provided both actual and target values, a sparkline visualizes the actual value's variation.

Change Sparkline Options

To manage sparkline settings, click the Options button (the ⚙ icon) displayed next to the data item container. In the invoked Card Settings dialog, go to the Sparkline Options tab:

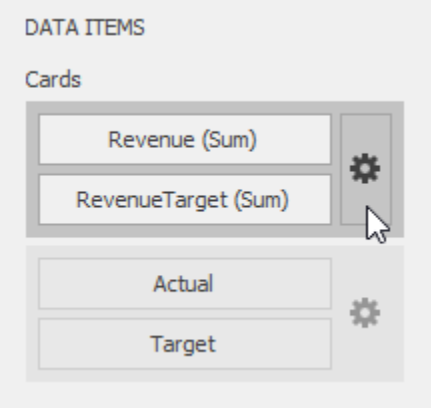


The following options are available:

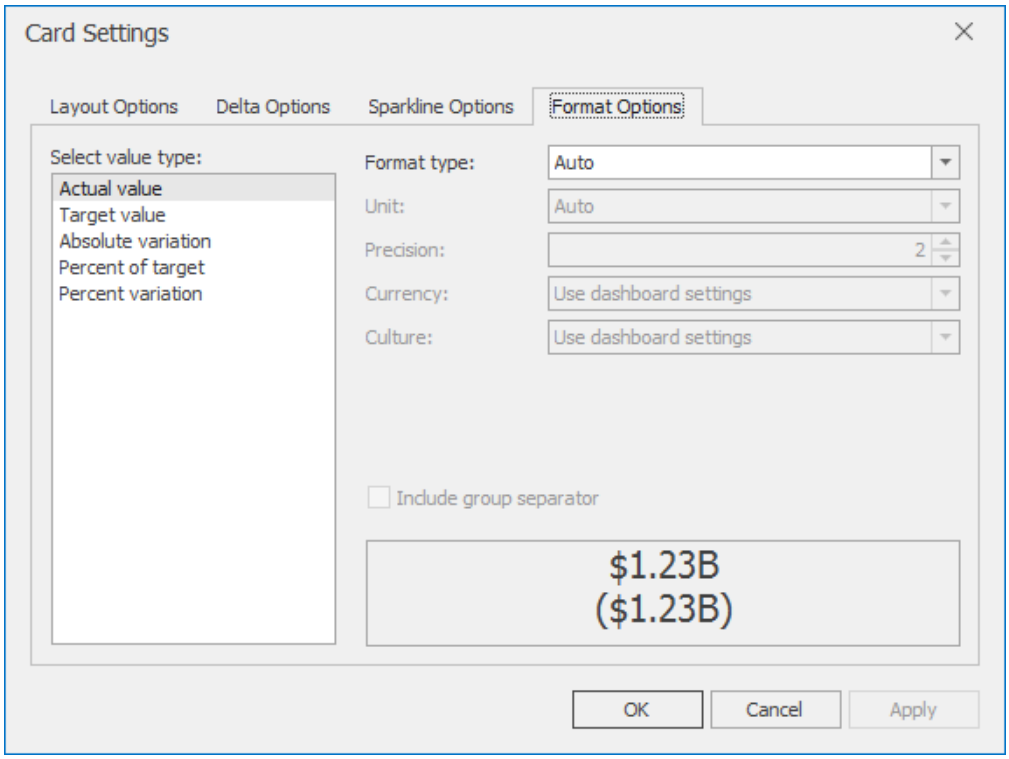
Sparkline Options	Description
Sparkline view type	Defines the sparklines view type. Sparkline data points can be represented as area, line, bars, or win and loss squares.
Highlight min/max points	Specifies whether to highlight the minimum/maximum points of a sparkline.
Highlight start/end points	Specifies whether to highlight the start/end points of a sparkline.

Formatting

The Card dashboard item formats the actual and target values displayed within cards using format settings specified for data items. Click the options buttons (the ⚙ icon) displayed next to the data item container in the Cards section to change format settings for other values.



In the invoked Card Settings dialog, go to the Format Options tab and use the Select value type option to specify which values format settings should change.



You can change format settings for the following value types:

- Actual Value
- Target Value
- Absolute Variation
- Percent of Target
- **Percent Variation**

To learn more about format settings, see Formatting Numeric Values in the Formatting Data topic.

Interactivity

This section describes features that enable interaction between the Card dashboard item and other items. These features include Master Filtering and Drill-Down.

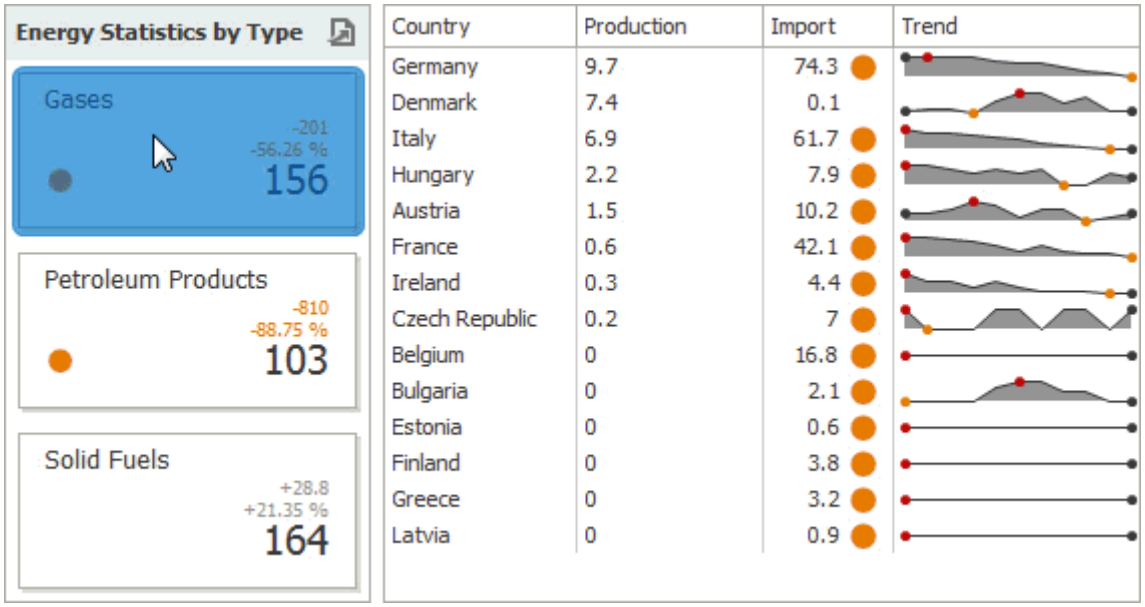
The section contains the following topics.

- Master Filtering
- Drill-Down

Master Filtering

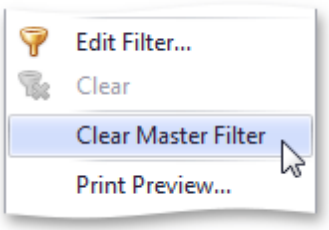
The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

When Master Filtering is enabled, you can click a card (or multiple cards by holding down the CTRL key) to make other dashboard items only display data related to the selected card(s).



To learn how to enable Master Filtering in the Designer, see the Master Filtering topic.

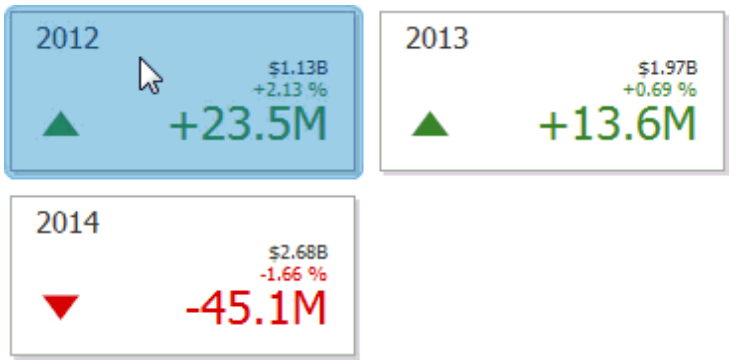
To reset filtering, use the Clear Master Filter button (the icon) in the caption of the Card dashboard item, or the Clear Master Filter command in the Card's context menu.



Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more about drill-down concepts common to all dashboard items, see the Drill-Down topic.

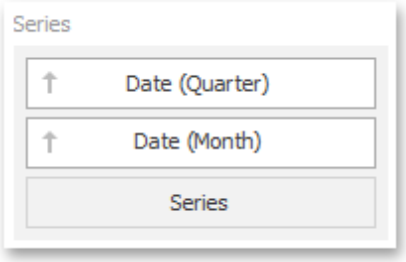
When drill-down is enabled, you can click a card to view the details.



Note

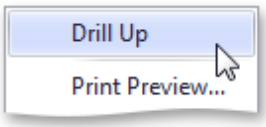
When Master Filtering is enabled, you can view the details by double-clicking a card.

Drill-down requires that the Series section contains several dimensions, from the least to the most detailed dimension.



To enable drill-down, click the Drill Down button in the Data Ribbon tab (or the button if you are using the toolbar menu).

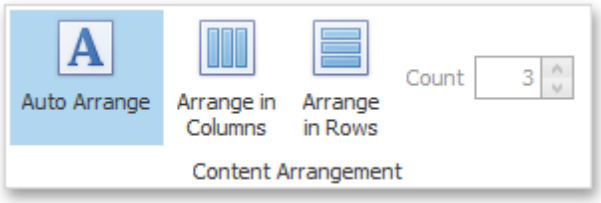
To return to the previous detail level (drill up), use the Drill Up button (the icon) in the caption of the Card dashboard item, or the Drill Up command in the Card's context menu.

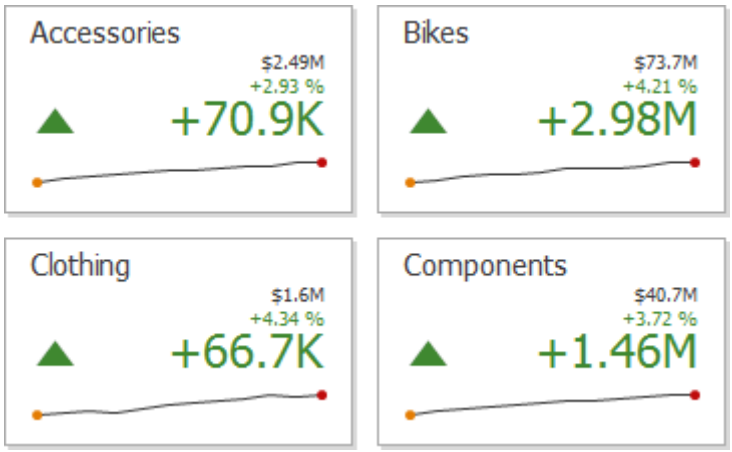


Cards Arrangement

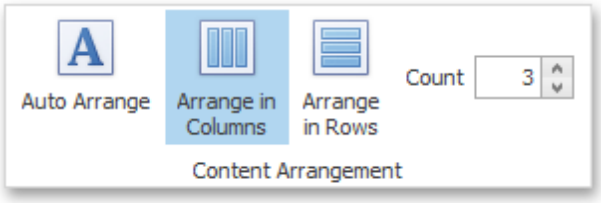
The Card dashboard item allows you to specify the number of columns or rows in which individual cards are arranged.

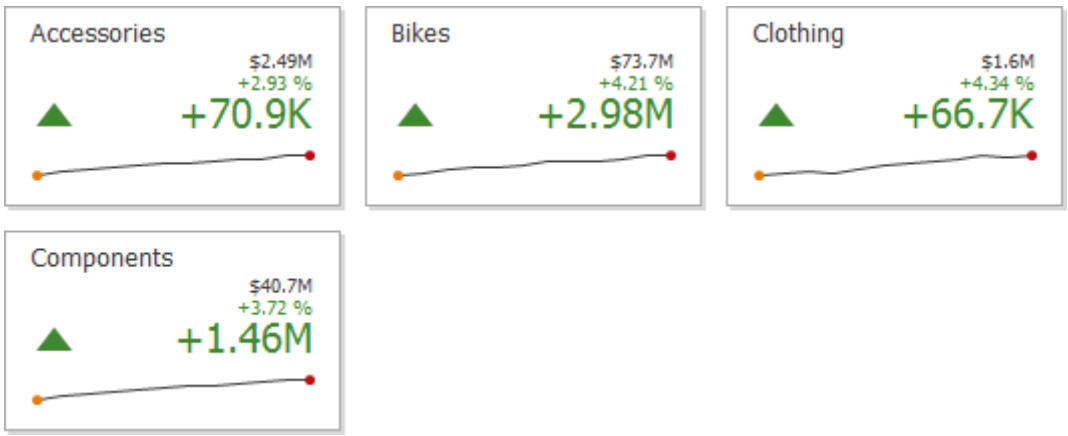
Use the buttons in the Content Arrangement group of the Design Ribbon tab to control how cards are arranged. The Auto Arrange option is enabled by default, which automatically resizes cards to fit within the dashboard item.



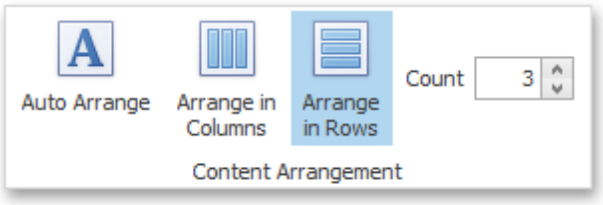


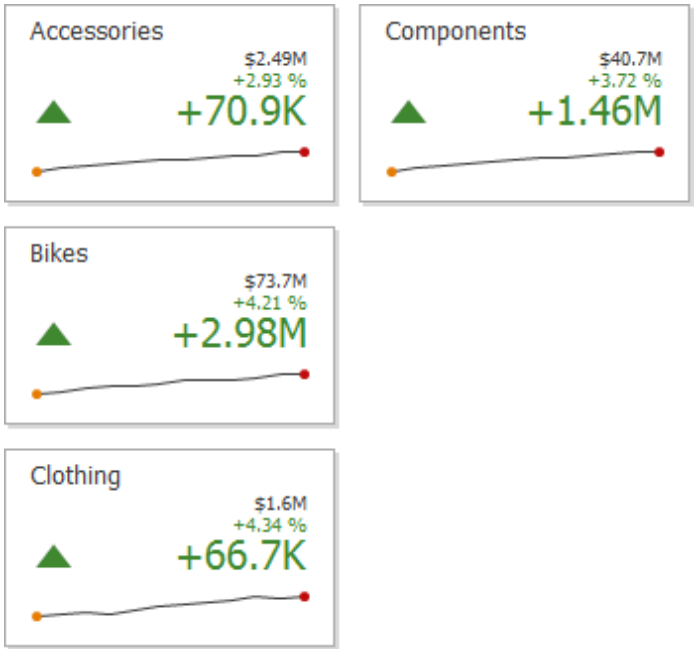
You can also specify the number of columns in which cards are arranged. Click the Arrange in Columns button and specify the appropriate number in the Count field.





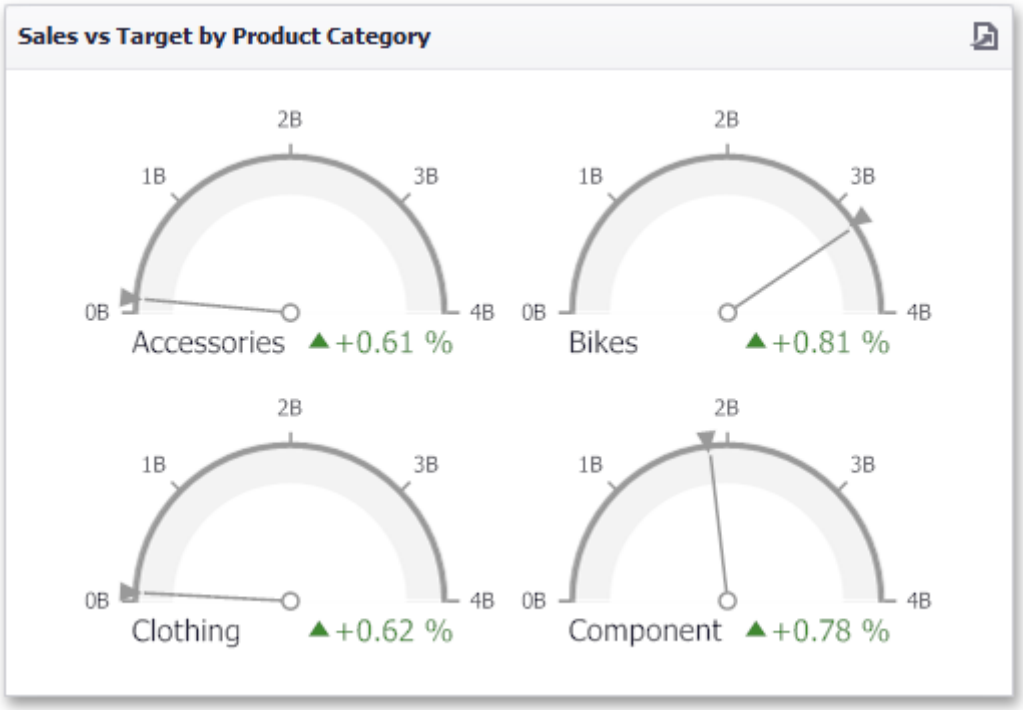
Similarly, you can arrange cards in a specific number of rows.


Auto Arrange
Arrange in Columns
Arrange in Rows
Count
3
Content Arrangement


Accessories
$2.49M
+2.93 %
+70.9K
Components
$40.7M
+3.72 %
+1.46M
Bikes
$73.7M
+4.21 %
+2.98M
Clothing
$1.6M
+4.34 %
+66.7K

Gauges

The Gauge dashboard item displays a series of gauges. Each gauge can communicate two values - one with a needle and the other with a marker on the scale.



This section consists of the following subsections:

- Providing Data
  Provides information about how to supply the Gauge dashboard item with data.
- Delta
  Provides an overview of the Gauge dashboard item's capability to display the difference between two parameters.
- Gauge Scale
  Describes options that relate to the gauge scales.
- Interactivity
  Describes features that enable interaction between the Gauge dashboard item and other items.
- Layout
  Describes layout options of the Gauge dashboard item.
- Style
  Provides information about how to specify the gauge style.

Providing Data

The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic.

The only difference is in the data sections that the required dashboard item has. This topic describes how to bind a Gauge dashboard item to data in the Designer.

The image below shows a sample Gauge dashboard item that is bound to data.

To bind the Gauge dashboard item to data, drag and drop a data source field to a placeholder contained in one of the available data sections. A table below lists and describes Gauge's data sections.

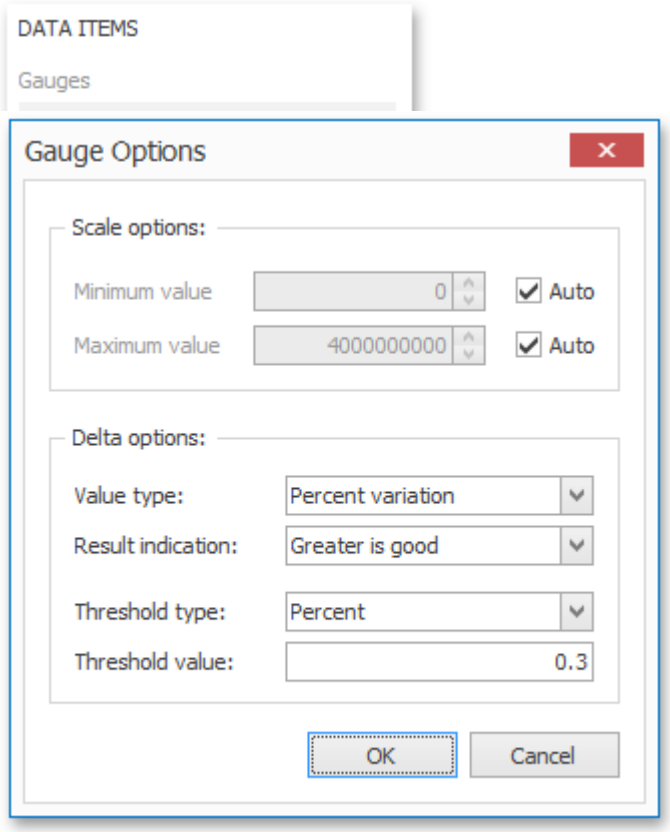
Section	Description
Gauges	Contains data items used to calculate values displayed by gauges. Data items are arranged in containers. Each data item container can hold two data items. The first item contains actu al data and the second item (optional) contains target data. If both items are provided, gauges show the difference between actual and target values. You can fill several data item containers in the Gauges section and use the **Values** drop-down menu to switch between the provided values. To invoke the **Values** menu, click the icon in the dashboard item caption. This drop-own menu is available if the Series section is not empty. Otherwise, a separate gauge is created for each data item container, and all gauges are displayed simultaneously.
Series	Contains data items whose values are used to label gauges.

Delta

Gauges allow you to display the difference between the actu al and target values of a particular parameter. This difference is called delta.

Delta is shown with a delta in dicator (indicating whether the actual value is less than or greater than the target value) and delta valu es (representing this difference as an absolute value or a variation).

To customize settings that relate to the calculation and display of deltas, use the options buttons (the icon) displayed next to the data item container in the Gauges section of the DATA ITEMS pane.



These buttons invoke the Gauge Options dialog.

Use it to define the condition for displaying delta indication, specify which delta values should be displayed, and introduce the comparison tolerance.

- Delta
- Values
  Delta
  Indication
- Comparison Tolerance

Delta Values

You can specify which values should be displayed within gauges. Use the Value type combo box in the Gauge Options window to select the value that will be displayed as the delta value.

Value Type	Result
Actual Value	
Absolute Variation	

Percentage Variation	
Percentage of Target	

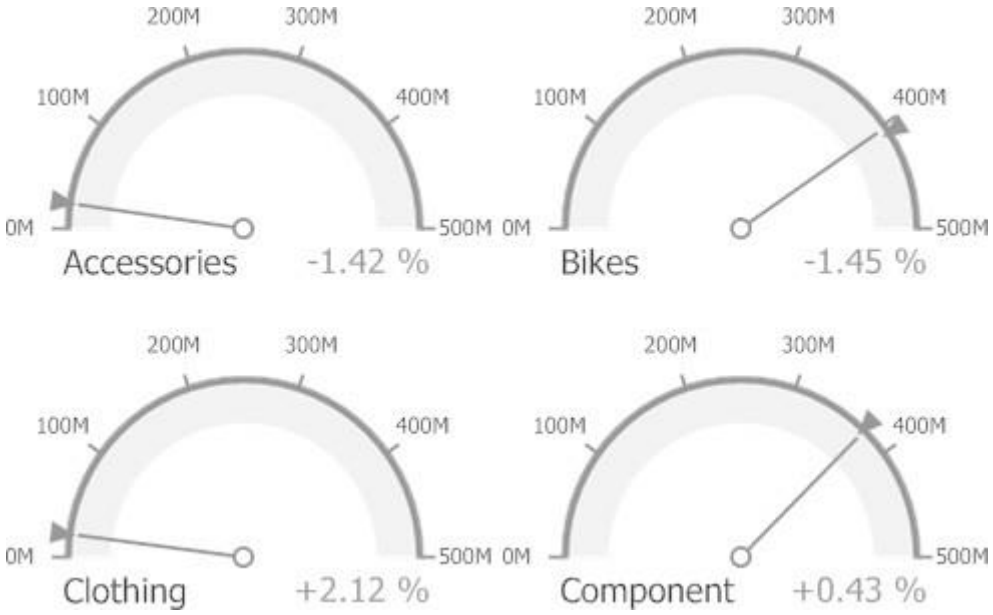
Delta Indication

You can specify the condition for displaying delta indication. To do this, use the Result indication combo box in the Gauge Options window.

- Greater is Good - The 'good' indication is displayed if the actual value exceeds the target value; if the target value exceeds the actual value, the 'bad' indication is displayed.

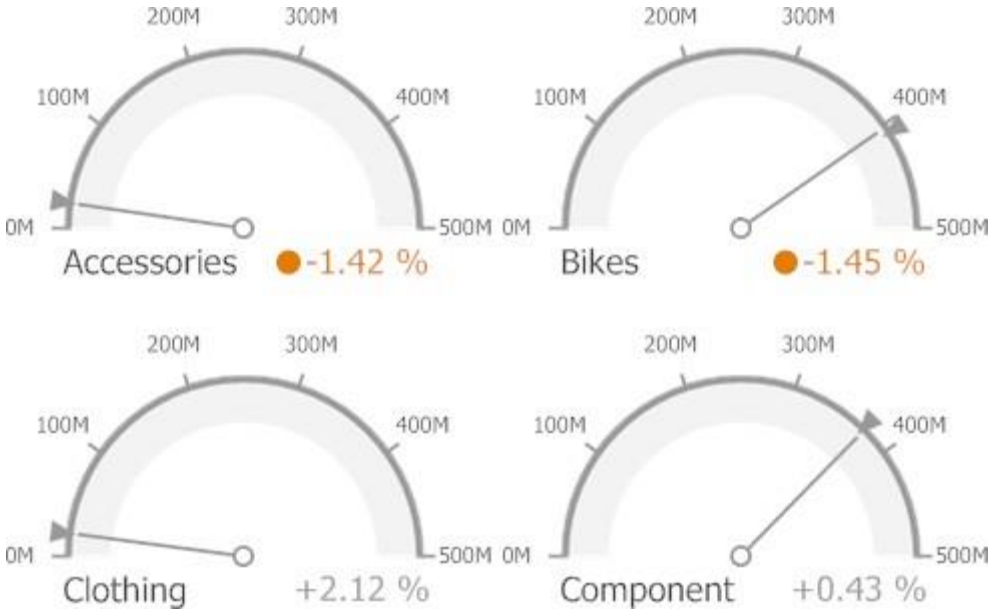
- Less is Good - The 'bad' indication is displayed if the actual value exceeds the target value; if the target value exceeds the actual value, the 'good' indication is displayed.

No Indication - Indication is not displayed.



Warning if Greater - A warning is displayed if the actual value exceeds the target value; otherwise, no indication is displayed.

Warning if Less - A warning is displayed if the target value exceeds the actual value; otherwise, no indication is displayed.



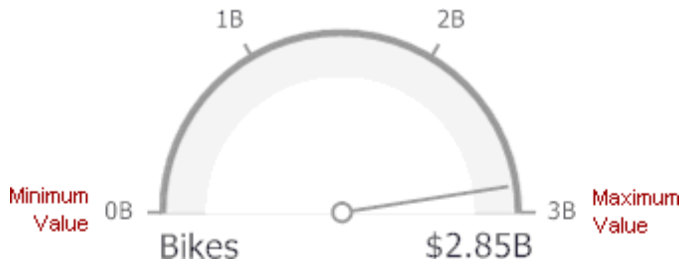
Comparison Tolerance

The comparison tolerance allows you to create more advanced conditions for displaying delta indication. For instance, you can specify that a specific indication should be displayed when the actual value exceeds the target value by 1 0 % or by $ 2 K.

Use the Threshold type combo box to select whether you wish to specify the comparison tolerance in percentage values or in absolute values. Then use the Threshold value box to specify the comparison tolerance.

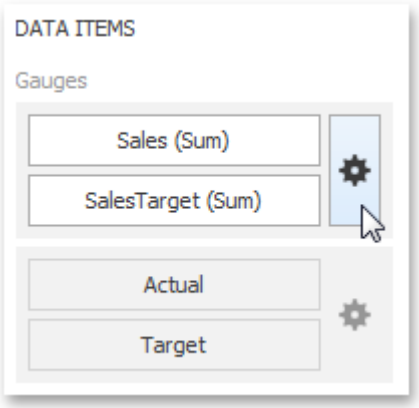
Gauge Scale

By default, the Gauge dashboard item automatically determines the range of the gauge scales based on the values they display.

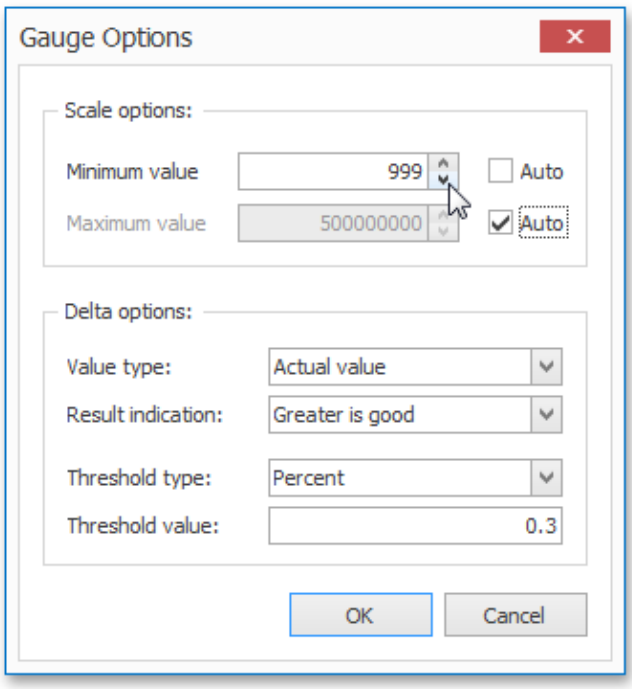


You can override this behavior and specify the maximum and minimum values on the scale.

To do this, invoke the Gauge Options window using the Options button displayed in the data item container in the Gauges section of the DATA ITEMS pane.



In the Gauge Options window, uncheck the Auto check box for the maximum or minimum value, and specify this value in the corresponding field.



Interactivity

This section describes features that enable interaction between the Gauge dashboard item and other items. These features include Master Filtering and Drill-Down.

The section contains the following topics.

- Master Filtering
- Drill-Down

Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

When master filtering is enabled, you can click a gauge (or multiple gauges by holding down the CTRL key) to make other dashboard items only display data related to the selected gauge(s).

To learn how to enable master filtering in the Designer, see the Master Filtering topic.

To reset filtering, use the Clear Master Filter button (the icon) in the caption of the Gauge dashboard item, or the Clear Master Filter command in the Gauges context menu.

Drill-Down

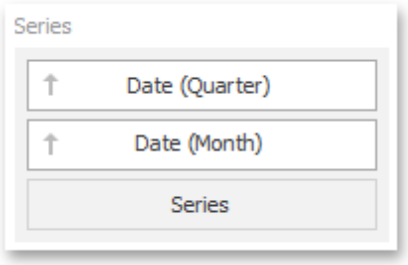
The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more about drill-down concepts common to all dashboard items, see the Drill-Down topic.

When drill-down is enabled, you can click a gauge to view the details.

Note

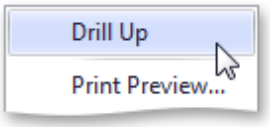
When Master Filtering is enabled, you can view the details by double-clicking a gauge.

Drill-down requires that the Series section contains several dimensions, from the least detailed to the most detailed dimension.



To enable drill-down, click the Drill Down button in the Data Ribbon tab (or the button if you are using the toolbar menu).

To return to the previous detail level (drill up), use the Drill Up button (the icon) in the caption of the Gauge dashboard item, or the Drill Up command in the Gauges context menu.

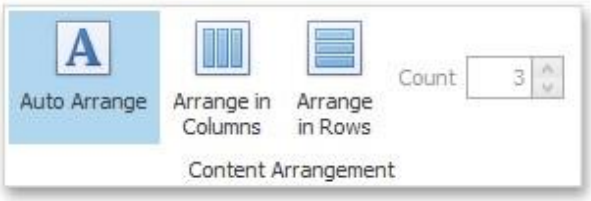


Layout

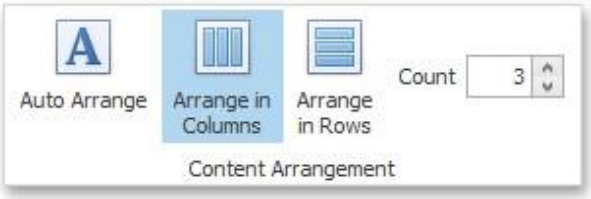
The Gauge dashboard item allows you to specify the number of columns or rows in which individual gauges are arranged.

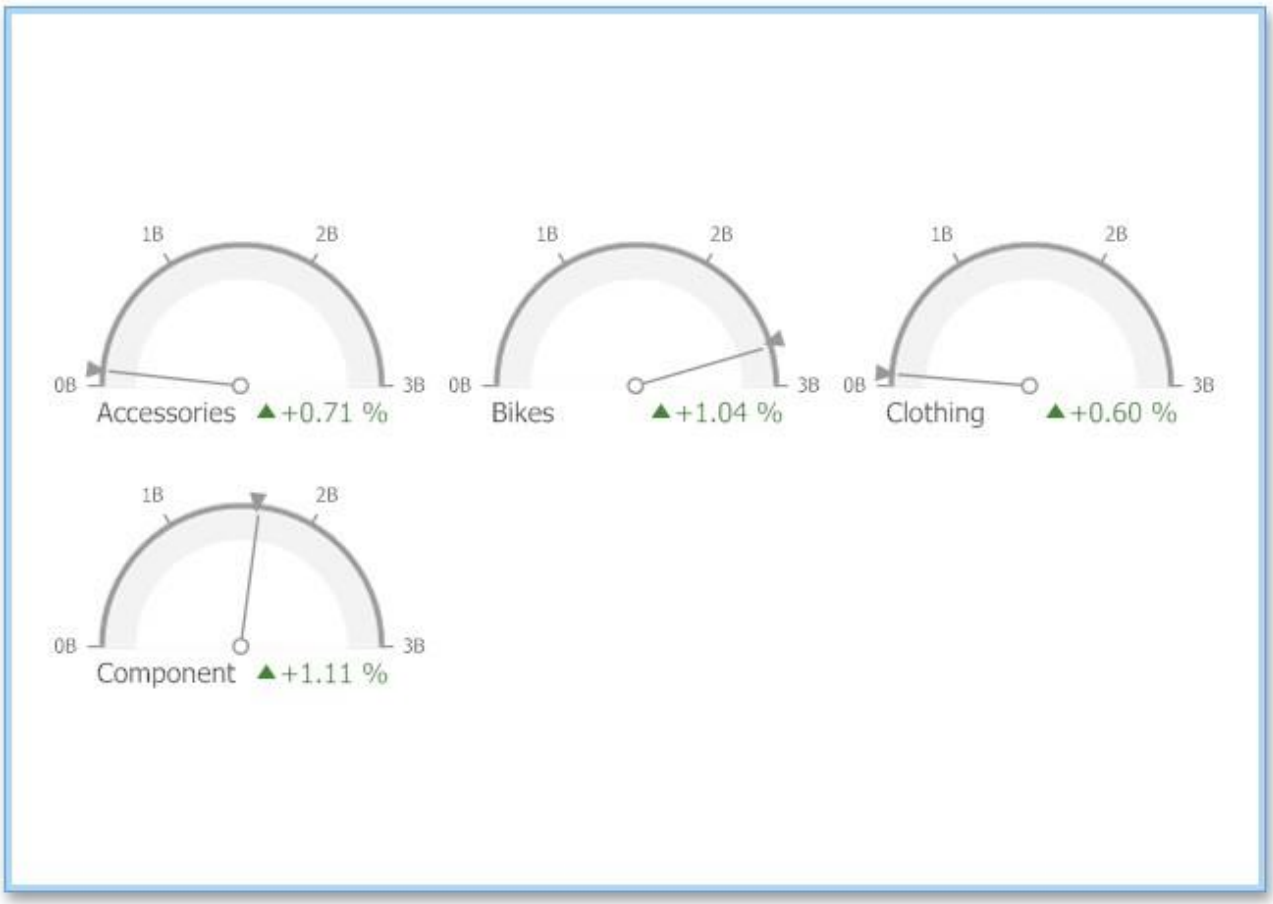
To control how gauges are arranged, use the buttons in the Content Arrangement group of the Design Ribbon tab.

By default, the Auto Arrange option is enabled, which automatically resizes gauges to fit within the dashboard item.

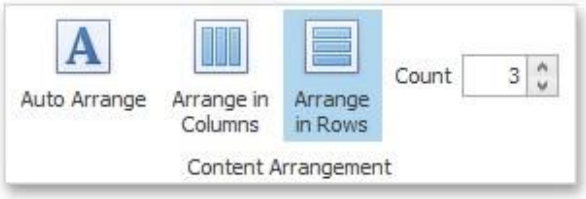


You can also specify the number of columns in which gauges are arranged. Click the Arrange in Columns button and specify the appropriate number in the Count field.





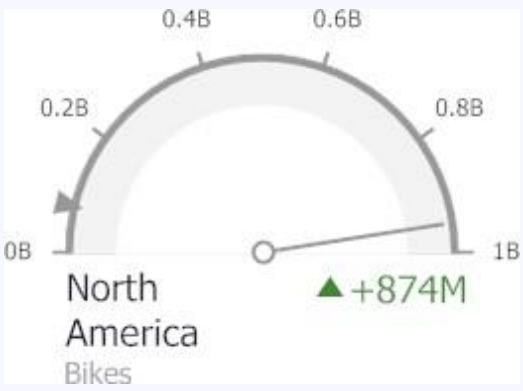
Similarly, you can arrange pies in a specific number of rows by clicking the Arrange in Rows button.

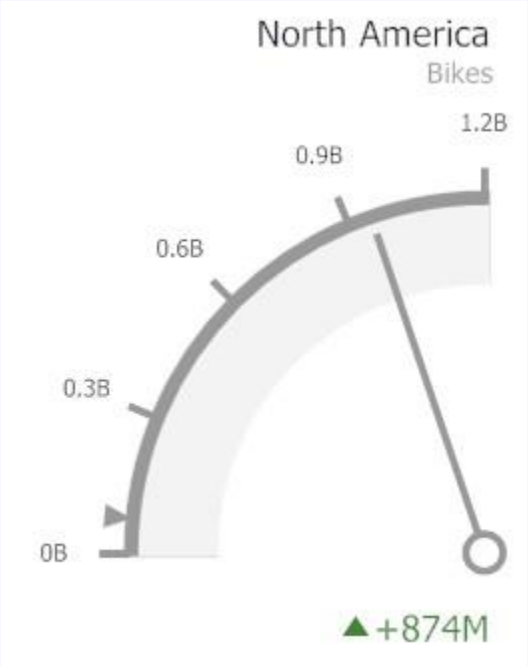
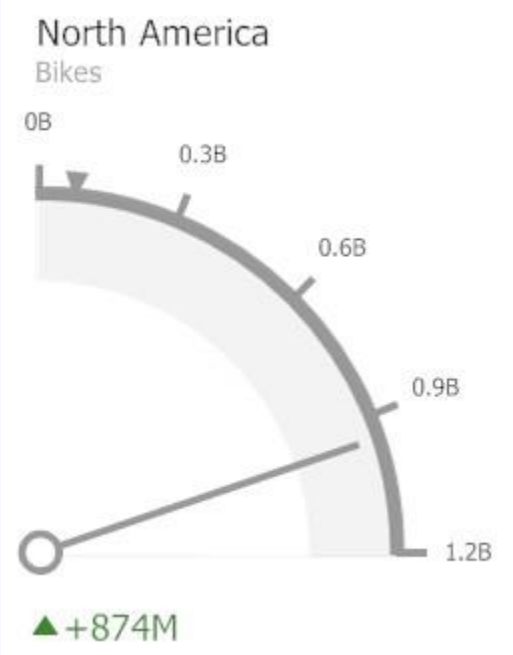

Auto Arrange
Arrange in Columns
Arrange in Rows
Count
3
Content Arrangement

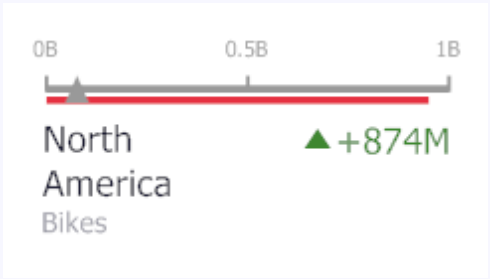
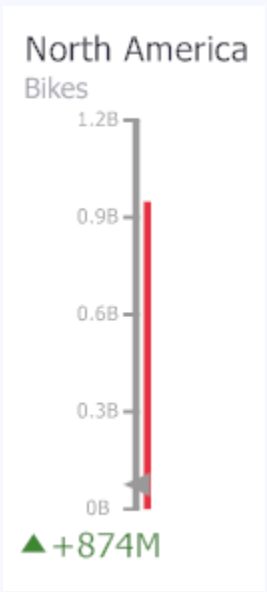
1B
2B
0B
3B
Accessories
+0.71 %
1B
2B
0B
3B
Component
+1.11 %
1B
2B
0B
3B
Bikes
+1.04 %
1B
2B
0B
3B
Clothing
+0.60 %

Style

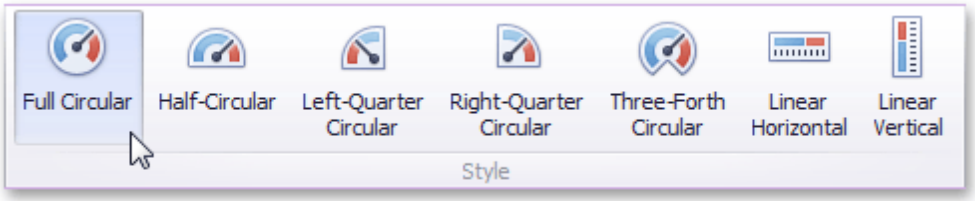
The Gauge dashboard item allows you to select the gauge type. The following types are supported.

Full Circular	
Half Circular	

Left-Quarter Circular	
Right-Quarter Circular	

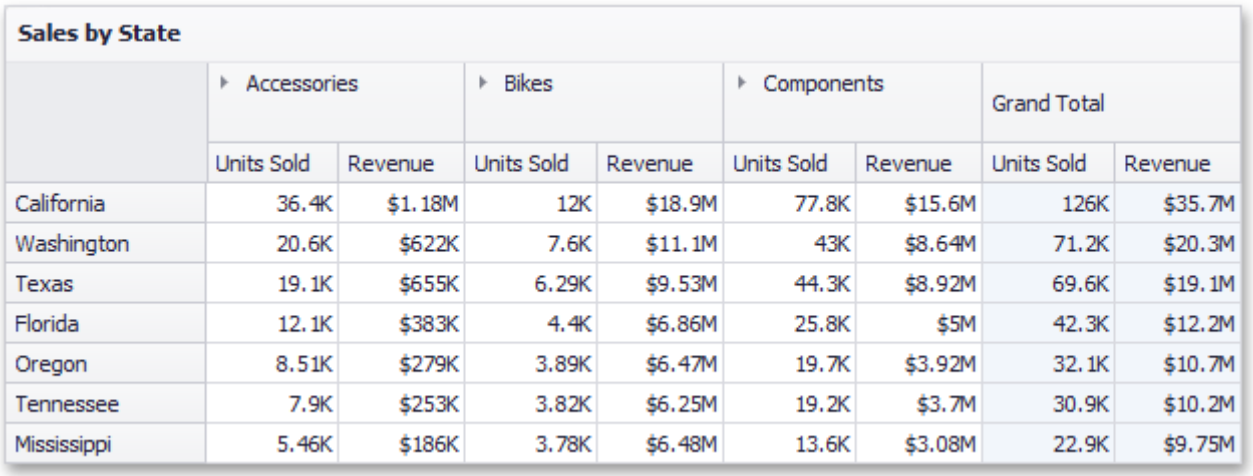
Three-Fourths Circular	
Linear Horizontal	
Linear Vertical	

To select the gauge type, use the buttons in the Style group of the Design Ribbon tab.



Pivot

The Pivot dashboard item displays a cross-tabular report that presents multi-dimensional data in an easy-to-read format.



Sales by State

	Accessories		Bikes		Components		Grand Total	
	Units Sold	Revenue	Units Sold	Revenue	Units Sold	Revenue	Units Sold	Revenue
California	36.4K	$1.18M	12K	$18.9M	77.8K	$15.6M	126K	$35.7M
Washington	20.6K	$622K	7.6K	$11.1M	43K	$8.64M	71.2K	$20.3M
Texas	19.1K	$655K	6.29K	$9.53M	44.3K	$8.92M	69.6K	$19.1M
Florida	12.1K	$383K	4.4K	$6.86M	25.8K	$5M	42.3K	$12.2M
Oregon	8.51K	$279K	3.89K	$6.47M	19.7K	$3.92M	32.1K	$10.7M
Tennessee	7.9K	$253K	3.82K	$6.25M	19.2K	$3.7M	30.9K	$10.2M
Mississippi	5.46K	$186K	3.78K	$6.48M	13.6K	$3.08M	22.9K	$9.75M

This section consists of the following

- subsections: Providing Data
  Explains how to supply the Pivot dashboard item with data.
- Interactivity
  Describes features that enable interaction between the Pivot and other dashboard items.
- Conditional Formatting
  Describes the conditional formatting feature that provides the capability to apply formatting to cells whose values meet the specified condition.
- Layout
  Describes the Pivot dashboard item's layout options.
- Expanded State
  Describes how to specify whether to expand column/row groups by default.

Providing Data

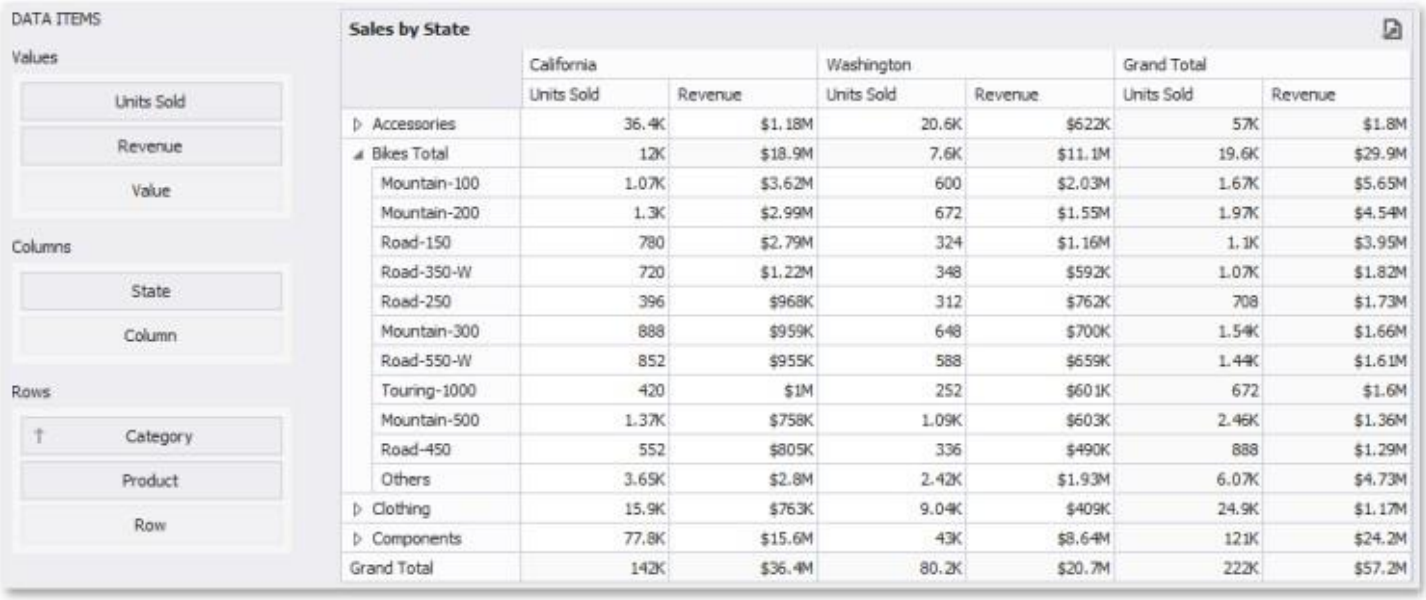
The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic.

The only difference is in the data sections that the required dashboard item has. This topic describes how to bind a Pivot dashboard item to data in the Designer.

- Binding to Data in the Designer
- Transposing Columns and Rows

Binding to Data in the Designer

The image below shows a sample Pivot dashboard item that is bound to data.



To bind the Pivot dashboard item to data, drag and drop a data source field to a placeholder contained in one of the available data sections. A table below lists and describes a Pivot's data sections.

Section	Description
Values	Contains data items used to calculate values displayed in the pivot table.
Columns	Contains data items whose values are used to label columns.
Rows	Contains data items whose values are used to label rows.

Transposing Columns and Rows

The Pivot dashboard item provides the capability to transpose pivot columns and rows. In this case, data items contained in the Columns section are moved to the Rows section and vice versa.

	2013	2014	2015	Grand Total
Bikes	$72.2M	$79.3M	$83.6M	$235M
Components	$42.2M	$45.3M	$48.2M	$136M
Accessories	$2.77M	$2.99M	$3.15M	$8.91M
Grand Total	$117M	$128M	$135M	$380M

	Bikes	Components	Accessories	Grand Total
2013	$72.2M	$42.2M	$2.77M	$117M
2014	$79.3M	$45.3M	$2.99M	$128M
2015	$83.6M	$48.2M	$3.15M	$135M
Grand Total	$235M	$136M	$8.91M	$380M

To transpose the selected Pivot dashboard item, use the Transpose button in the Home ribbon tab.

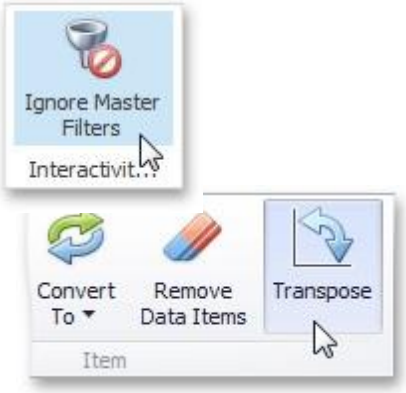
Interactivity

This document describes the features that enable interaction between the Pivot and other dashboard items. These features include Master Filtering.

Master Filtering

The Dashboard allows you to use any data-aware dashboard item as a filter for other dashboard items (Master Filter). To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

Data displayed in the Pivot dashboard item can be filtered by other master filter items. You can prevent the pivot from being affected by other master filter items using the Ignore Master Filters button on the Data Ribbon tab.



Conditional Formatting

The Pivot dashboard item supports the conditional formatting feature that provides the capability to apply formatting to cells whose values meet the specified condition. This feature allows you to highlight specific cells or entire rows/columns using a predefined set of rules. To learn more about conditional formatting concepts common for all dashboard items, see the Conditional Formatting topic.

- Conditional Formatting
- Overview Create a Format Rule
- Edit a Format Rule

Conditional Formatting Overview

The Pivot dashboard item allows you to use conditional formatting to measures placed in the Values section and dimensions placed in the Columns/Rows sections.

Note

Note that you can use hidden measures to specify a condition used to apply formatting to visible values.

New appearance settings are applied to pivot data cell or cells corresponding to column/row field values.

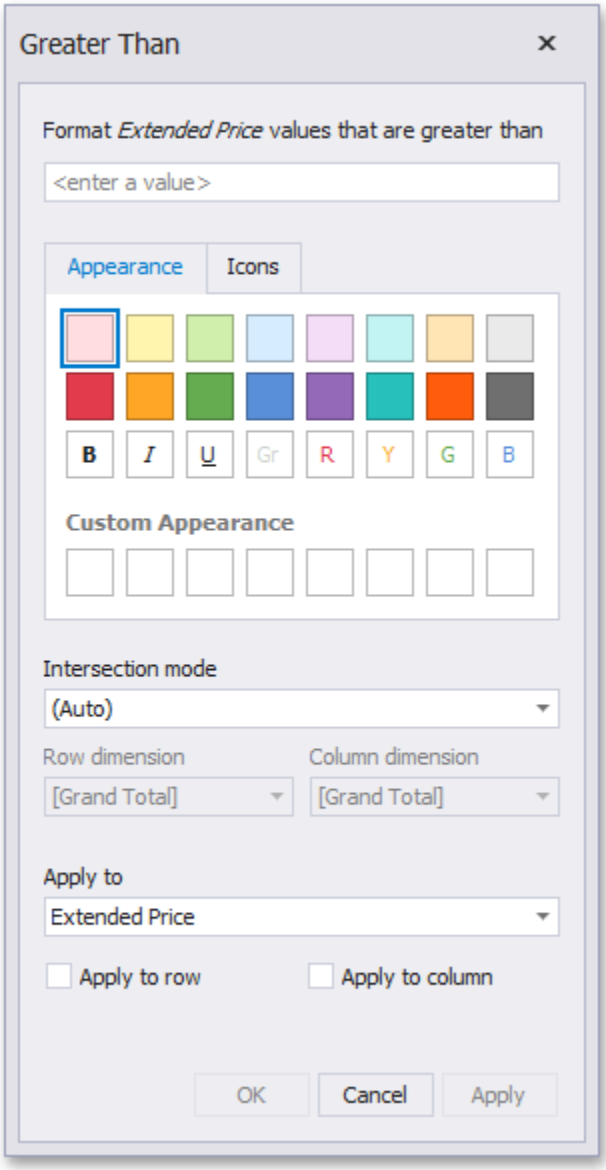
Create a Format Rule

To create a new format rule for the Pivot's dimension/measure, do one of the following.

Click the Options button next to the required measure/dimension, select Add Format Rule and choose the condition.

Use the Edit Rules dialog.

Depending on the selected format condition, the dialog used to create a format rule for Pivot contains different settings. For instance, the image below displays the Greater Than dialog invoked for the measure.



This dialog contains the following settings specific to Pivot.

- **Intersection mode** specifies the level on which to apply conditional formatting to pivot cells. The following levels are supported.
  .1.Auto - Identifies the default level. For the Pivot dashboard item, Au to identifies the F irs t L evel.
  .2.First Level - First level values are used to apply conditional formatting.
  .3.Last Level - The last level values are used to apply conditional formatting.
  .4.All Levels - All pivot data cells are used to apply conditional formatting.
  .5.Specific Level - Values from the specific level are used to apply conditional formatting.
- If you specified the **Intersection mode** as Specific L evel, use the **Row dimension** and **Column dimension**

  combo boxes to set the specific level.
- The **Apply to row** and **Apply to column** check boxes allow you to specify whether to apply the formatting to the entire pivot row/column.

Note

If you are creating a new format rule for the dimension from the **Columns/Rows** section, the corresponding format condition dialog would not contain any Pivot specific settings.

Edit a Format Rule

To edit format rules for the current Grid dashboard item, use the following options.

Click the Edit Rules button in the Home ribbon tab or use corresponding item in the Pivot context menu. Click the menu button for the required data item and select Edit Rules.

All of these actions invoke the Edit Rules dialog containing existing format rules. To learn more, see Conditional Formatting.

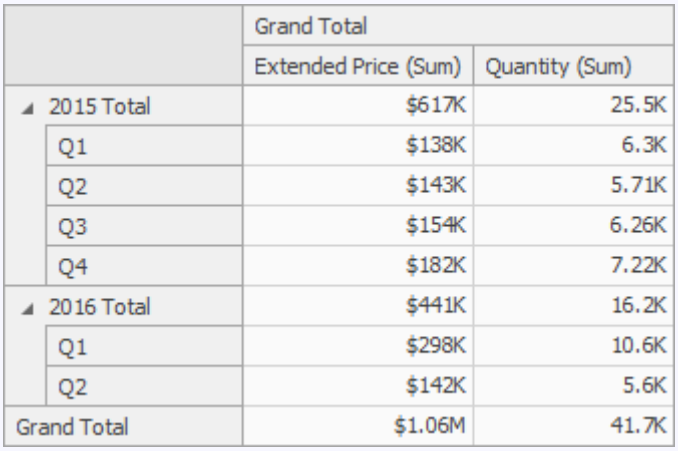
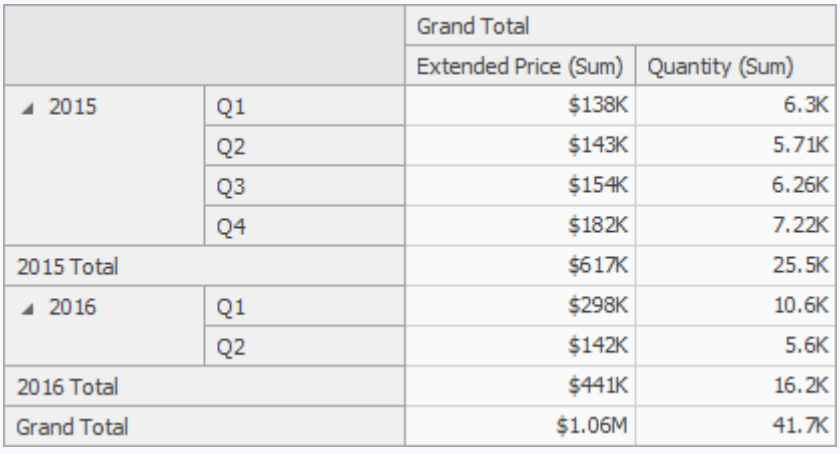
Layout

This topic describes how to control the Pivot dashboard item layout, the visibility of totals and grand totals, etc.

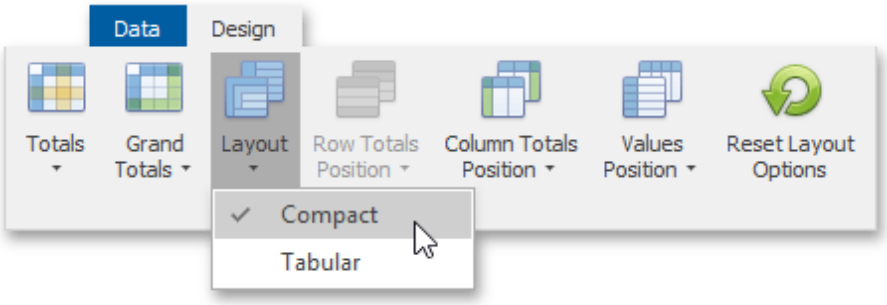
- Layout
- Type
- Totals
- Visibility
- Totals
  Position
  Values
  Visibility
  Values
  Position
- Reset Layout Options

Layout Type

If the Pivot dashboard item contains a hierarchy of dimensions in the Rows section, you can specify the layout used to arrange values corresponding to individual groups.

Layout type	Example	Description
Compact		Displays values from different Row dimensions in a single column. Note that in this case totals are shown at the top of a group, and you cannot change totals position.
Tabular		Displays values from different Row dimensions in separate columns.

Use the Layout button in the Design ribbon tab to change the Pivot layout.



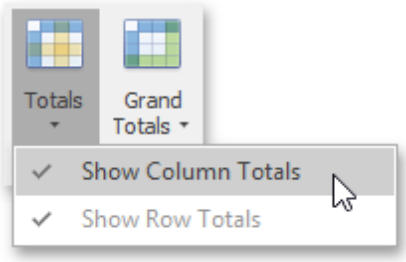
Totals Visibility

You can control the visibility of totals and grand totals for the entire Pivot dashboard item. For instance, the image below displays the Pivot dashboard item with the disabled row totals.

		Grand Total	
		Extended Price (Sum)	Quantity (Sum)
◢ 2015	Q1	$138K	6.3K
	Q2	$143K	5.71K
	Q3	$154K	6.26K
	Q4	$182K	7.22K
2015 Total		$617K	25.5K
◢ 2016	Q1	$298K	10.6K
	Q2	$142K	5.6K
2016 Total		$441K	16.2K
Grand Total		$1.06M	41.7K

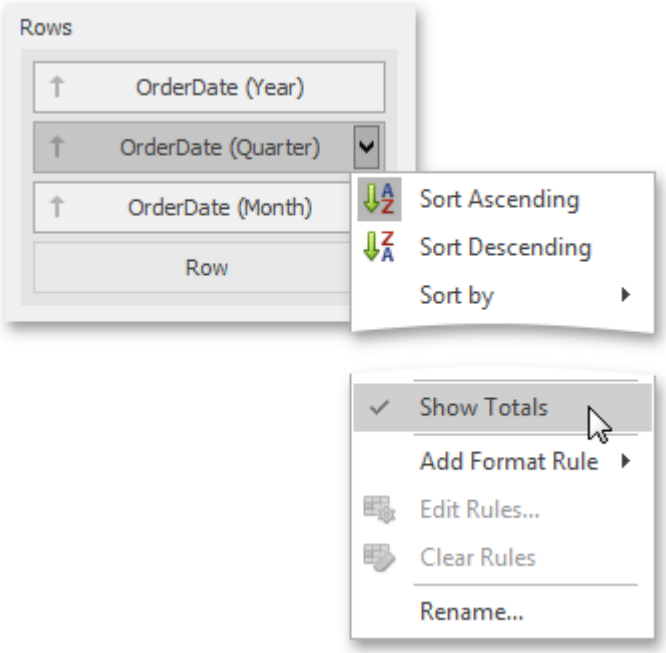
		Grand Total	
		Extended Price (Sum)	Quantity (Sum)
◢ 2015	Q1	$138K	6.3K
	Q2	$143K	5.71K
	Q3	$154K	6.26K
	Q4	$182K	7.22K
◢ 2016	Q1	$298K	10.6K
	Q2	$142K	5.6K
Grand Total		$1.06M	41.7K

To manage the visibility of totals and grand totals, use the Totals and Grand Totals buttons in the Design ribbon tab, respectively.



These buttons invoke a popup menu that allows you to manage the visibility of column and row totals/grand totals separately.

Moreover, you can control the visibility of totals for individual dimensions/measures by using the data item's context menu (Show Totals and Show Grand Totals options).



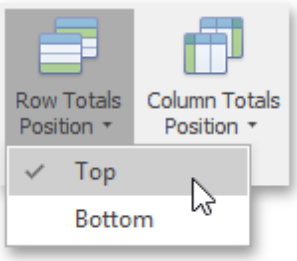
Totals Position

If necessary, you can change the Pivot dashboard items totals/grand totals position. For instance, in the image below the row totals are moved from the bottom to the top.

		Grand Total	
		Extended Price (Sum)	Quantity (Sum)
2015	Q1	$138K	6.3K
	Q2	$143K	5.71K
	Q3	$154K	6.26K
	Q4	$182K	7.22K
2015 Total		$617K	25.5K
2016	Q1	$298K	10.6K
	Q2	$142K	5.6K
2016 Total		$441K	16.2K
Grand Total		$1.06M	41.7K

		Grand Total	
		Extended Price (Sum)	Quantity (Sum)
Grand Total		$1.06M	41.7K
2015 Total		$617K	25.5K
2015	Q1	$138K	6.3K
	Q2	$143K	5.71K
	Q3	$154K	6.26K
	Q4	$182K	7.22K
2016 Total		$441K	16.2K
2016	Q1	$298K	10.6K
	Q2	$142K	5.6K

To manage totals position, use the Row Totals Position and Column Totals Position buttons in the Design ribbon tab.



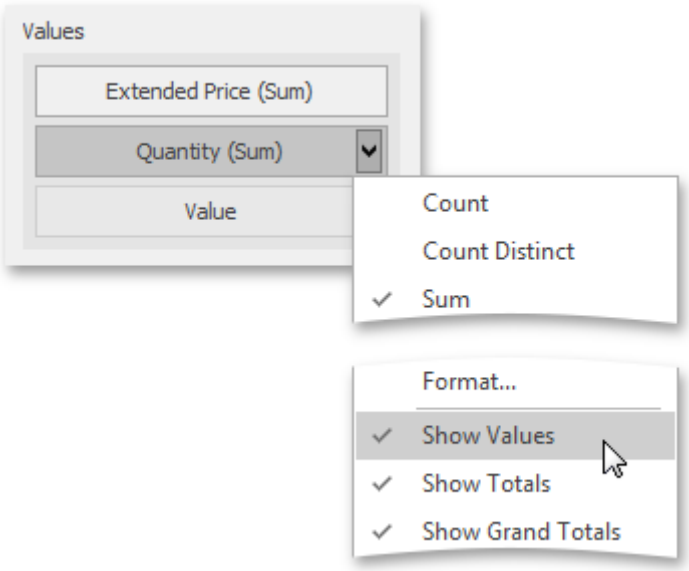
Values Visibility

The Pivot dashboard item can contain several measures in the Values section to hide summary values corresponding to specific measures. For instance, the image below shows the Pivot with hidden Qu an tity values.

		UK		USA	
		Extended Price (Sum)	Quantity (Sum)	Extended Price (Sum)	Quantity (Sum)
◢ 2015	Q1	$27.8K	1.24K	$110K	5.06K
	Q2	$38.1K	1.65K	$105K	4.06K
	Q3	$53.3K	1.86K	$101K	4.4K
	Q4	$41.3K	1.71K	$140K	5.51K
◢ 2016	Q1	$79.1K	3.04K	$219K	7.6K
	Q2	$44.7K	1.59K	$97.4K	4.01K

		UK	USA
◢ 2015	Q1	$27.8K	$110K
	Q2	$38.1K	$105K
	Q3	$53.3K	$101K
	Q4	$41.3K	$140K
◢ 2016	Q1	$79.1K	$219K
	Q2	$44.7K	$97.4K

To do this, use the Show Values command in the measure menu.



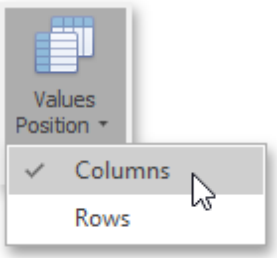
Values Position

The Pivot dashboard item allows you to control the position of headers used to arrange summary values corresponding to different measures. For instance, you can display values in columns or rows.

		Grand Total	
		Extended Price (Sum)	Quantity (Sum)
◢ 2016	Q1	$298K	10.6K
	Q2	$142K	5.6K
2016 Total		$441K	16.2K
Grand Total		$441K	16.2K

			Grand Total
◢ 2016	Q1	Extended Price (Sum)	$298K
		Quantity (Sum)	10.6K
	Q2	Extended Price (Sum)	$142K
		Quantity (Sum)	5.6K
2016 Total		Extended Price (Sum)	$441K
		Quantity (Sum)	16.2K
Grand Total		Extended Price (Sum)	$441K
		Quantity (Sum)	16.2K

To manage this position, use the Values Position button in the Design ribbon tab.



Reset Layout Options

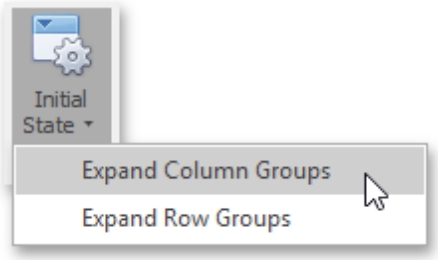
To reset layout options, click the Reset Layout Options button in the Design ribbon tab.

Expanded State

If the Columns or Rows section contains several data items, the Pivot column and row headers are arranged in a hierarchy and make up column and row groups.

	UK	USA	Grand Total
2016 Total	$124K	$317K	$441K
Q1 Total	$79.1K	$219K	$298K
January	$25.5K	$68.7K	$94.2K
February	$32.9K	$66.6K	$99.4K
March	$20.7K	$84.2K	$105K
Q2	$44.7K	$97.4K	$142K
Grand Total	$124K	$317K	$441K

You can collapse and expand row and column groups using the and buttons. However, the current expanded state of column and row groups do not save in the dashboard definition. If necessary, you can specify the default expanded state using the Initial State button in the Design ribbon tab.

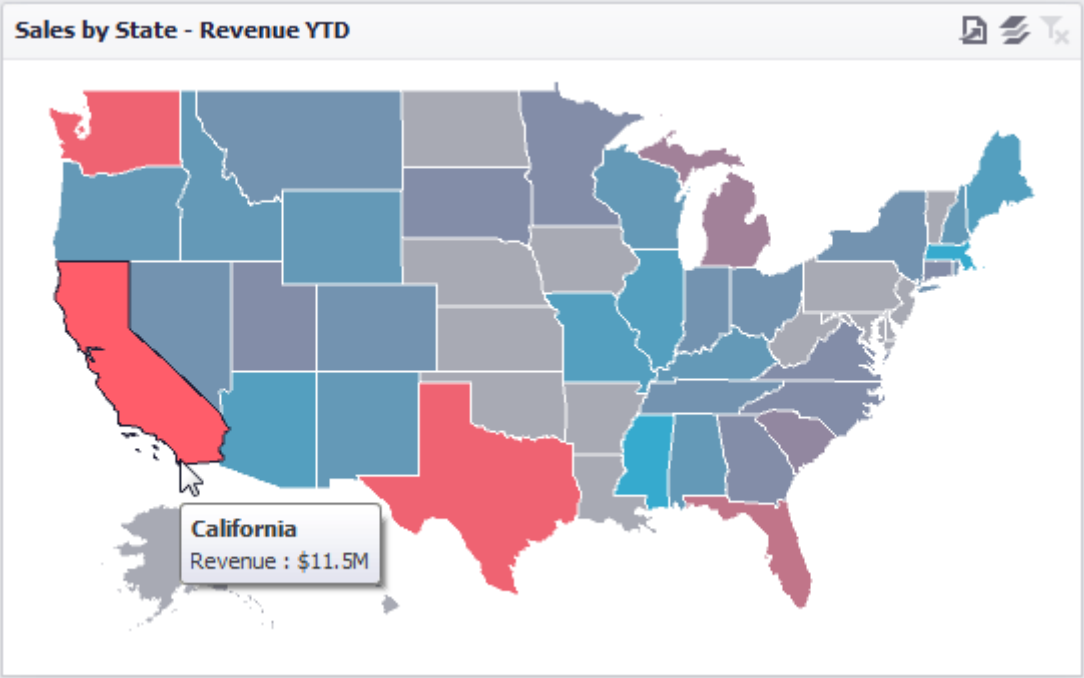


This button invokes the popup menu that allows you to select whether column and row groups should be collapsed or expanded by default.

Choropleth Map

The topics in this section describe the features available in the Choropleth Map dashboard item.

The Choropleth Map dashboard item allows you to colorize the required areas in proportion to the provided values.



This section consists of the following

- subsections: Providing Maps
  Describes how to use default dashboard maps or provide custom maps.
- Providing Data
  Explains how to supply the Choropleth Map dashboard item with data.
- Map Coloring
  Details how to color map shapes based on the values provided.
- Map Navigation
  Explains how to manage map zooming and scrolling.
- Interactivity
  Describes features that enable interaction between the Choropleth Map and other dashboard items.
- Labels
  Describes how to display additional information related to map shapes.
- Legend
  Explains the map legend and its options.

Providing Maps

This document explains how to use the default BI Dashboard maps, or provide custom maps.

Default Maps

The BI Dashboard ships with a set of default maps showing various parts of the world. The following maps are included.

World Countries - a world map.

Europe - a map of Europe.

Asia - a map of Asia.

North America - a map of North America. South America - a map of South America. Africa - a map of Africa.

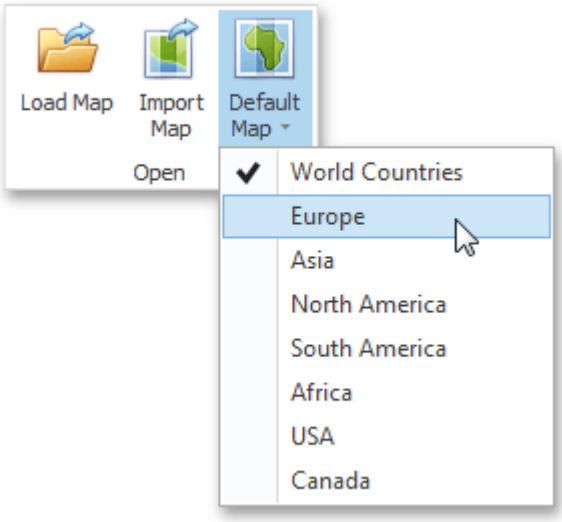
USA - a map of the USA.

Canada - a map of Canada.

Note

Note that the **World Countries** map has a lower level of detail than maps of specific regions and may not contain some countries. As an alternative, you can load a custom map with the required granularity.

To select the required default map, use the Default Map button in the Open group of the Design ribbon tab.



As an alternative, use the corresponding command in the map context menu.

Custom Maps

A Shapefile vector format to provide custom maps. Commonly, this format includes two file types.

.shp file - holds map shapes (points/lines/polygons).

.dbf file - contains attributes for each shape.

To open an existing shapefile, use the Load Map or Import Map button in the Ribbon, or the command in the context menu (Load Map... or Import Map...).

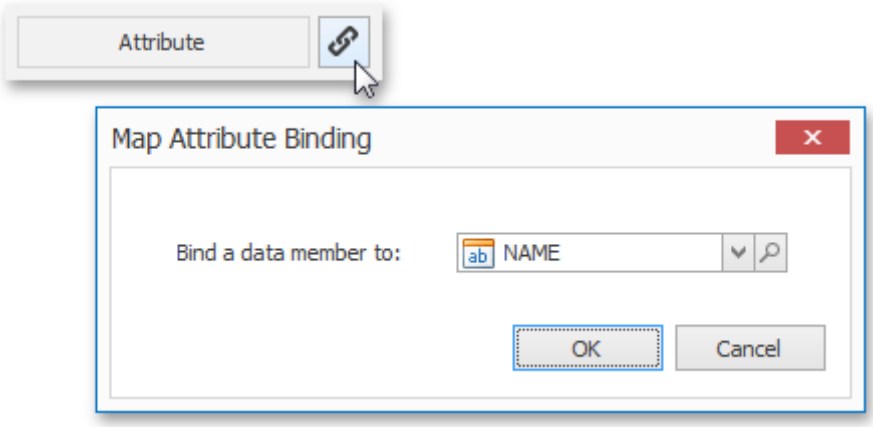
In the invoked dialog, locate the required .shp file. Note that custom maps created in the Cartesian coordinate system are not supported.

Note

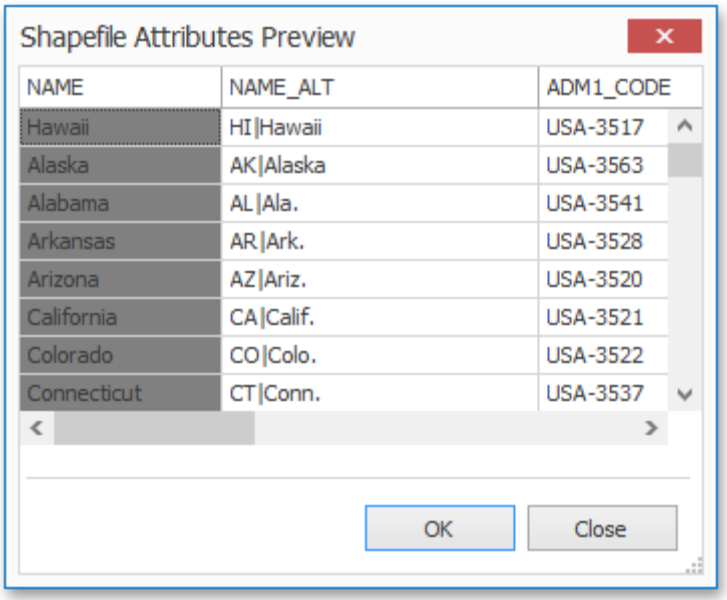
If the map is opened using the **Load Map** button, the dashboard XML definition will contain the path to a map shapefile. If the map is opened using the **Import Map** button, the dashboard XML definition will contain the map itself.

Map Attributes

After you select the default map or a custom map, you can view supplemental information (such as the name of the country, state, etc.). To do this, click the Options button next to the Attribute placeholder.



In the invoked Map Attribute Binding dialog, click Preview.



This table displays the available attributes for the current map. Each set of attribute values is related to a specific map shape.

To learn how to bind the map attribute to a data source field, see the Providing Data topic.

See Also

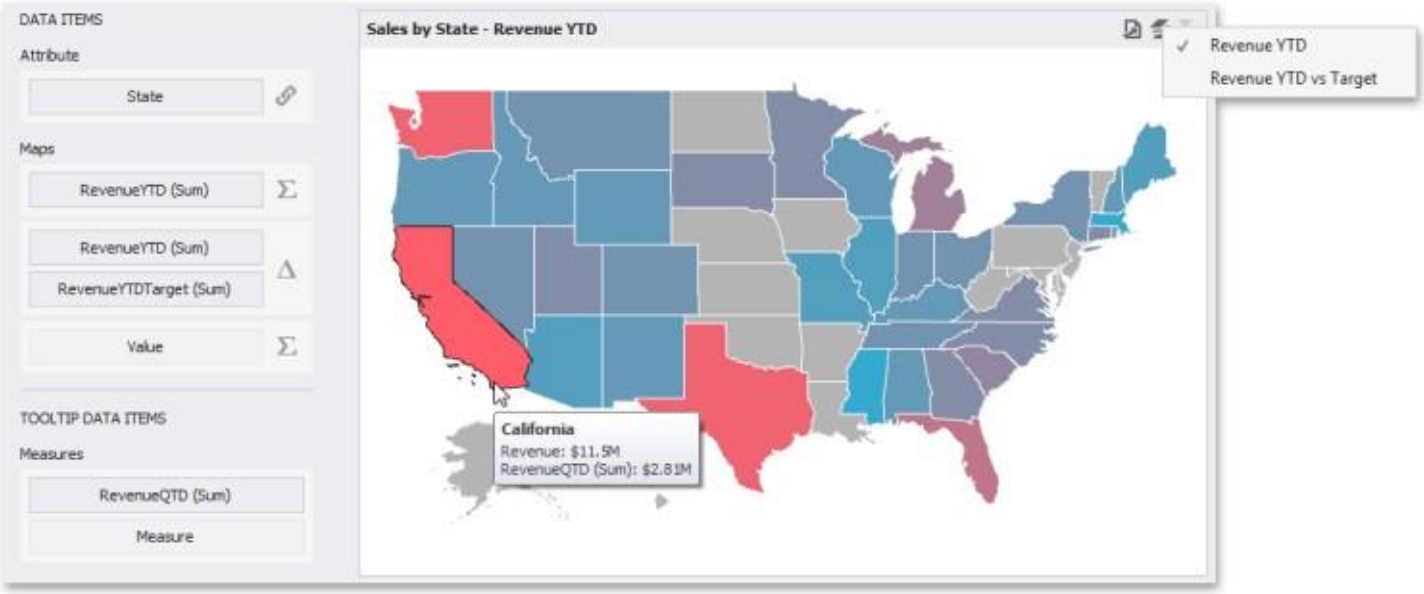
Providing Data

Providing Data

The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic.

The only difference is in the data sections that the required dashboard item has. This topic describes how to bind a Choropleth Map dashboard item to data in the Designer.

The image below shows a sample Choropleth Map dashboard item that is bound to data.

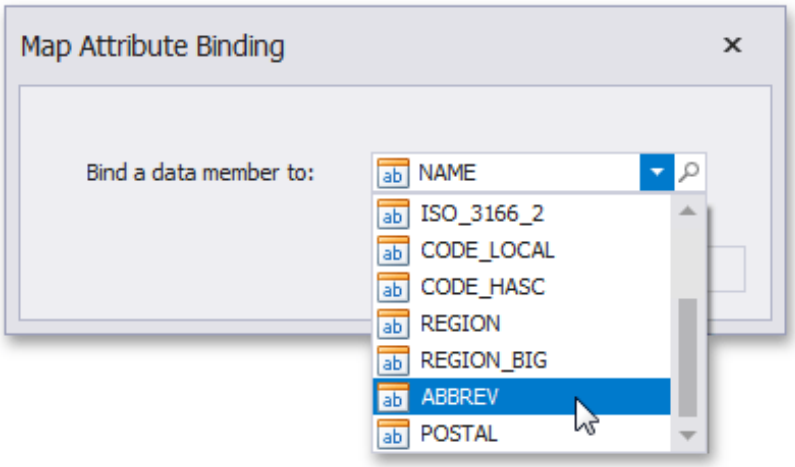


To bind the Choropleth Map dashboard item to data, drag and drop a data source field to a placeholder contained in one of the available data sections. The Choropleth Map provides two data item groups for data binding: DATA ITEMS and TOOLTIP DATA ITEMS. Tables below list the available data sections.

Data items

Attribute - Allows you to associate map shapes with data source field values.

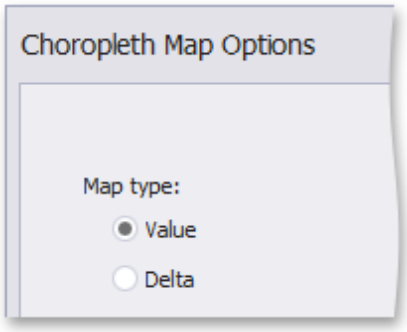
To associate map shapes with data source field values, drag-and-drop the required dimension to the data item's placeholder and select the required attribute in the Map Attribute Binding dialog. To invoke this dialog, click the Options button (the icon) next to the Attribute placeholder.



Select the required attribute and click OK.

Maps - Contains data items whose values are used to color map shapes. Map shape colors vary based on the map type.

Click the Options button (the Σ or Δ icon depending on the map type) next to the **Value** placeholder and select the required map type in the invoked **Choropleth Map Options** dialog.



If you select **Value**, the Choropleth map colors map shapes depending on the values provided. To learn more, see Map Coloring.

If you select **Delta**, the Choropleth map colors map shapes depending on the difference between two values. To learn how to specify delta indication settings, see Delta.

Note

You can fill several data item containers in the **Maps** section and use the **Values** drop-down menu to switch between the provided values. To invoke the **Values** menu, click the icon in the dashboard item caption.

Tooltip data items

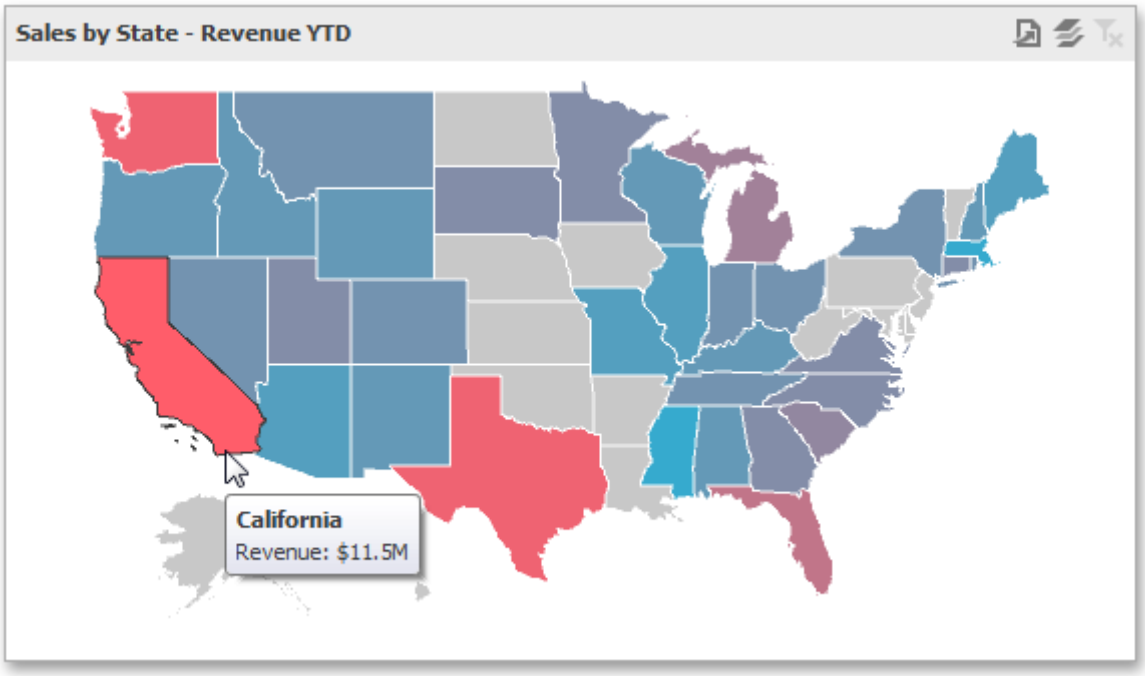
Measures - Allows you to add supplementary content to the tooltips. Drag and drop the required measures to provide additional data.

See Also

- Map
- Coloring
- Delta

Map Coloring

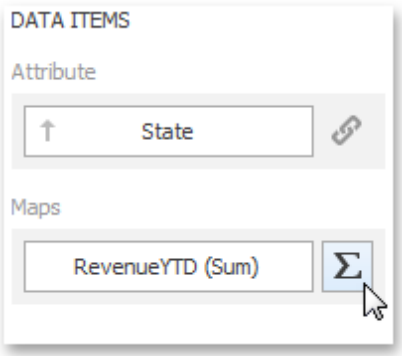
The Choropleth Map dashboard item colors map shapes depending on the data provided. For instance, you can visualize a sales amount or population density.



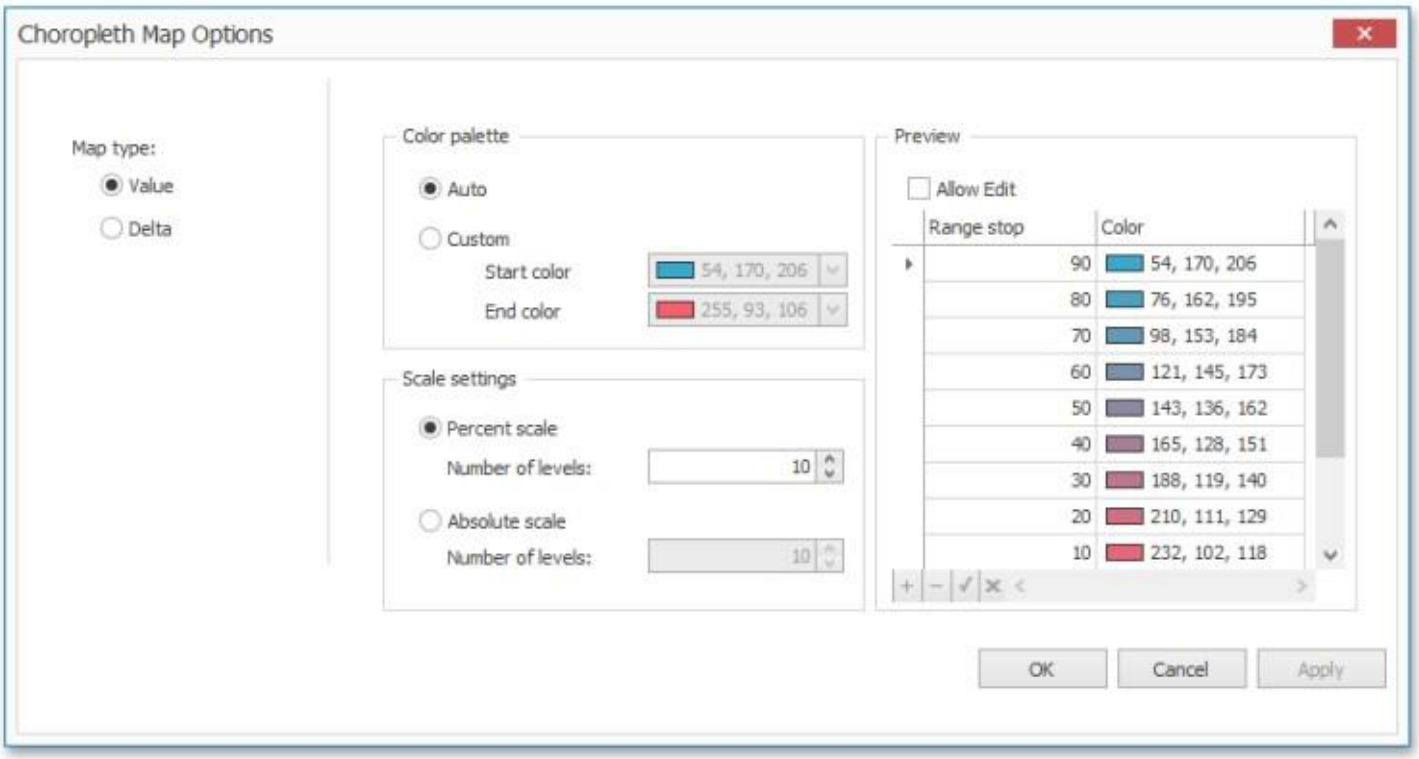
Palette and Scale Settings

The Choropleth Map automatically selects palette and scale settings to color map shapes.

If you need to customize these settings, click the Options button next to the data item that contains these values.



This invokes the Choropleth Map Options dialog.



You can specify the following settings in this window.

Color palette - allows you to specify the start and end color of the palette.

Scale settings - specifies whether a percent scale or an absolute scale is used to define a set of colors. You can specify the number of levels that represent the number of colors used to color the map.

Preview is used to display a full set of palette colors generated based on the start/end colors and the number of levels. Use the **Allow Edit** check box to automatically change the generated colors or specify value ranges for each color.

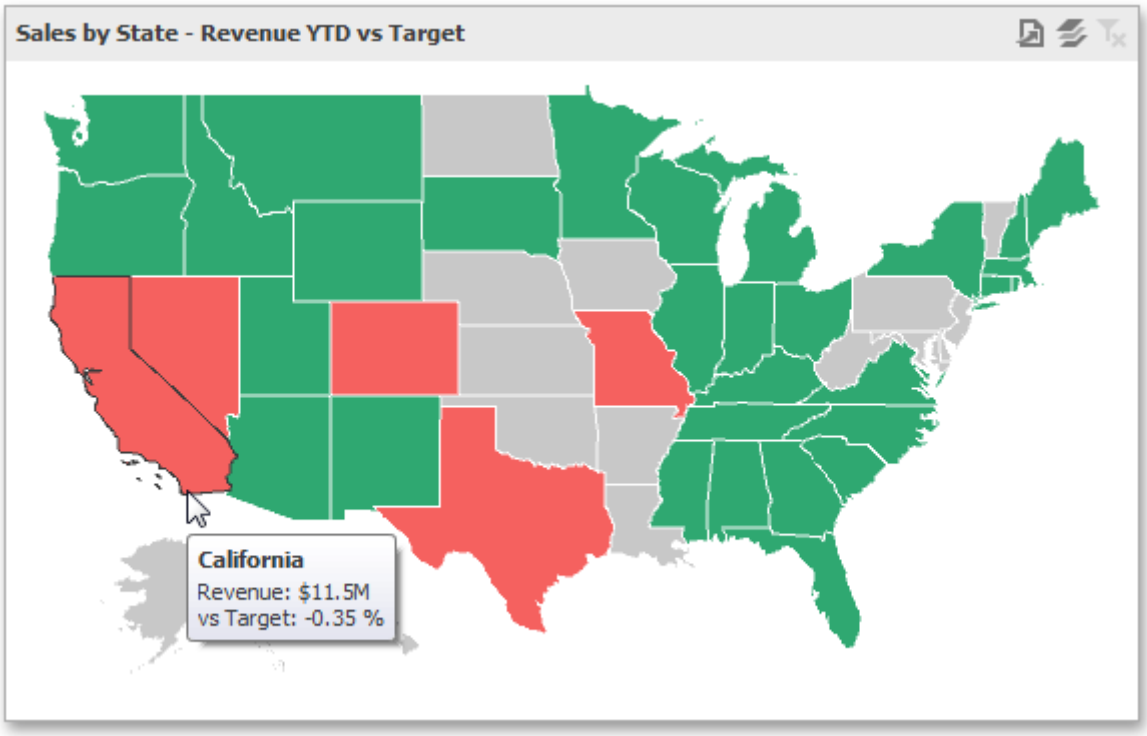
To learn how to display a map legend, see Legend.

Also, the Choropleth Map allows you to visualize the difference between the actu al and target values of a particular parameter. To learn more, see the Delta topic.

See Also Delta Legend

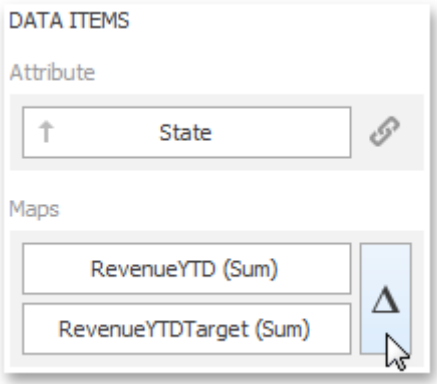
Delta

The Choropleth Map allows you to indicate the difference between the actu al and target values of a particular parameter. This difference is called delta.

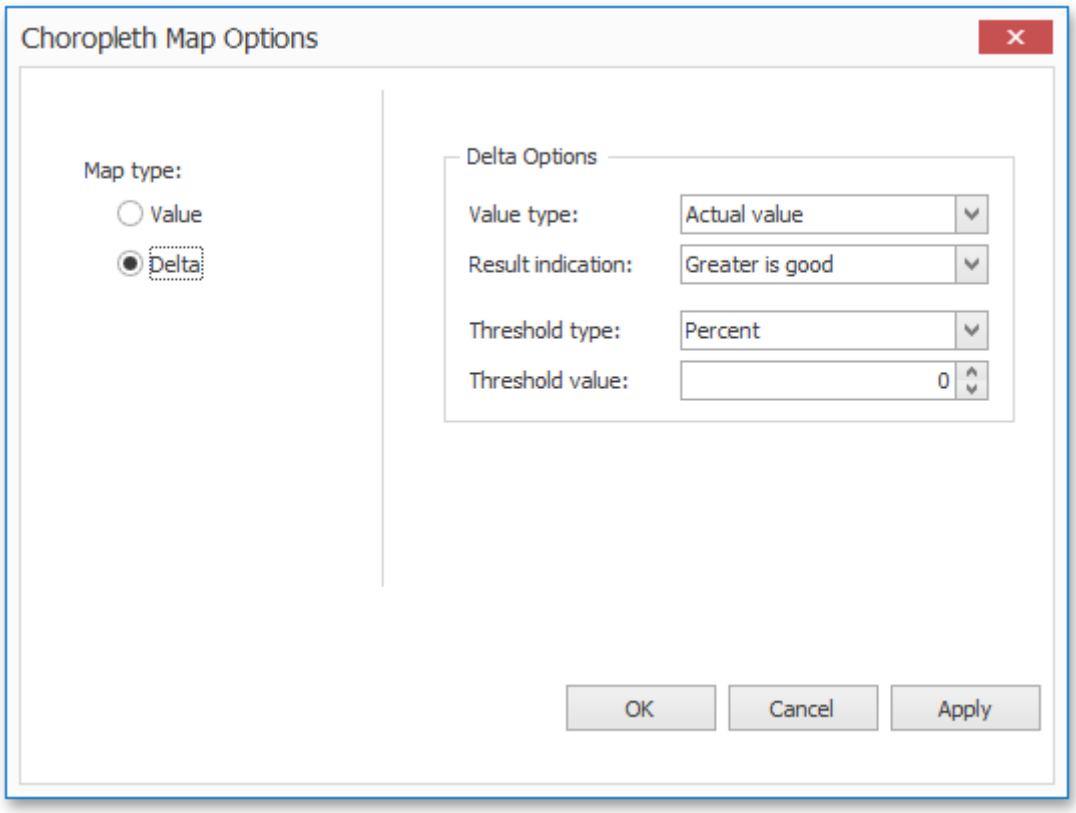


Delta Options

To specify delta indication settings, click the Options button next to the data item container.

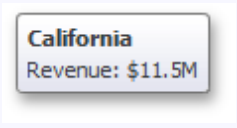
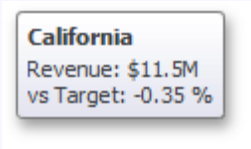
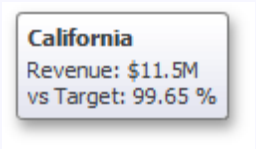


This invokes the Choropleth Map Options dialog. When the map type is set to Delta, this dialog contains the following settings.



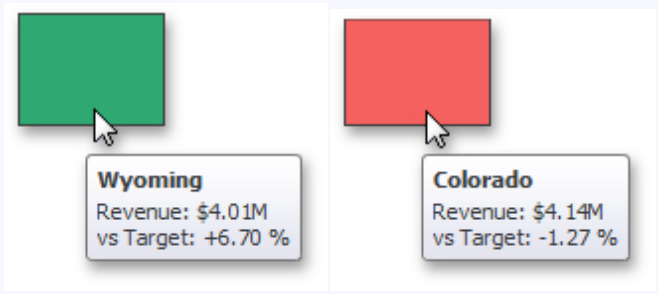
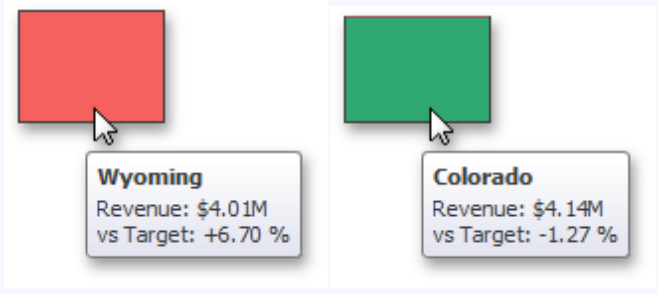
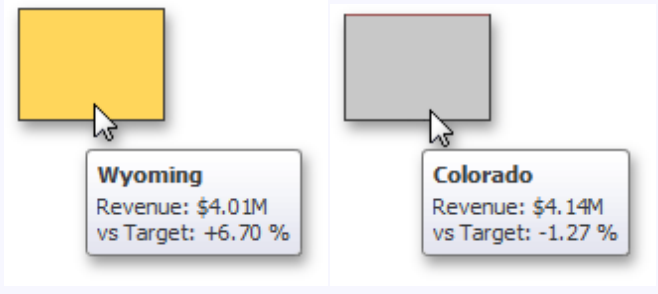
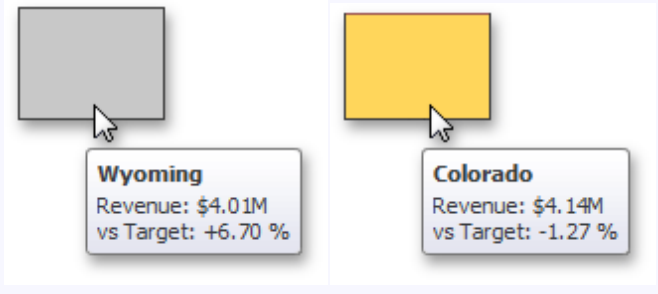
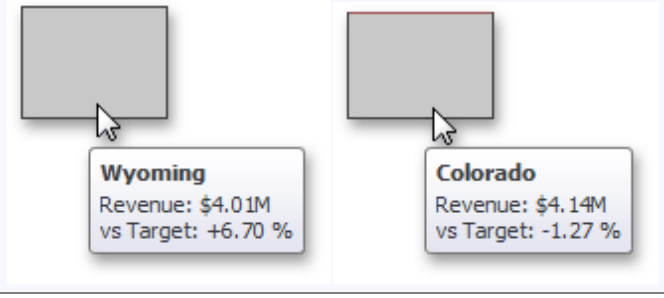
Value type

You can specify which values to display within map tooltips. Use the Value type combo box to select the value that will be displayed as the delta value.

Actual value	
Absolute variation	
Percent variation	
Percent of target	

Result Indication

You can specify the condition that will be used to select the indicator color. To do this, use the Result indication combo box.

Greater is good	
Less is good	
Warning if greater	
Warning if less	
No indication	

Threshold type and Threshold value

You can specify that a required indicator should only be displayed when the difference between the actual and target values exceeds a specified value. For instance, the actual value exceeds the target value by 10%, or by $2K.

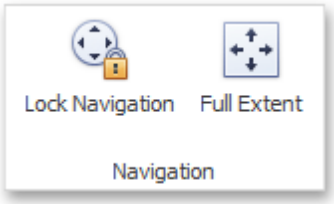
Use the Threshold type combo box to select whether you wish to specify the threshold in percentage values or in absolute values. Then use the Threshold value box to specify the threshold value.

Map Navigation

The Choropleth Map dashboard item allows you to perform navigation actions such as zooming and scrolling.

The Dashboard Designer allows you to specify the initial zooming/scrolling state for the Choropleth map using the mouse.

You can disable the capability to scroll/zoom the map using the Lock Navigation button in the Design ribbon tab.



Use the Full Extent button to display the entire map within the dashboard item.

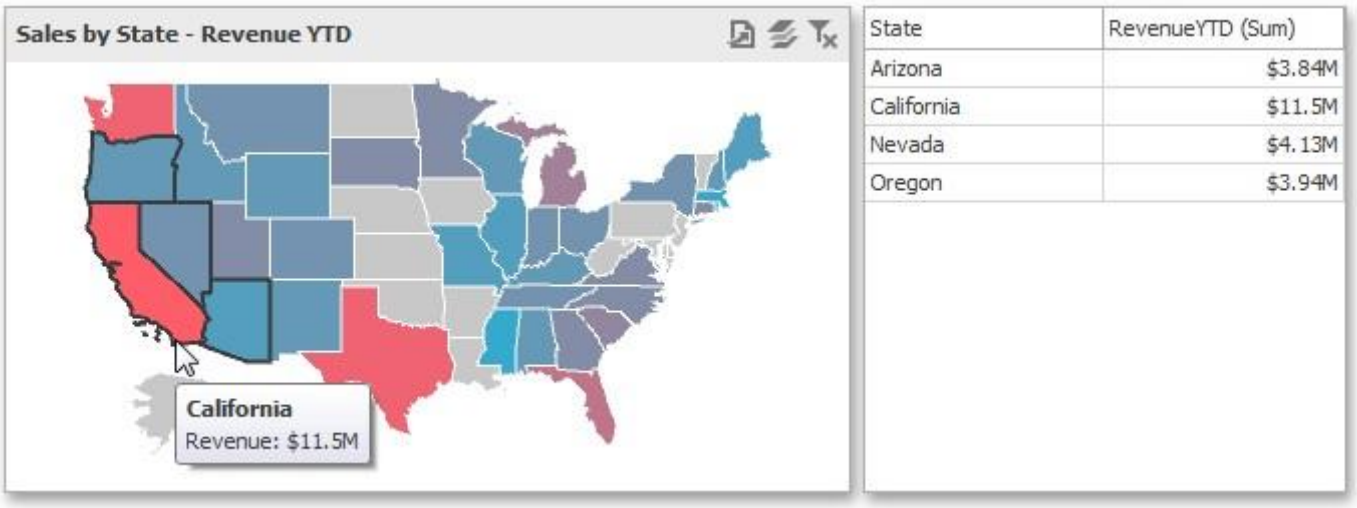
Interactivity

This document describes the Master Filtering feature, which enables interaction between the Choropleth Map and other dashboard items.

Master Filtering

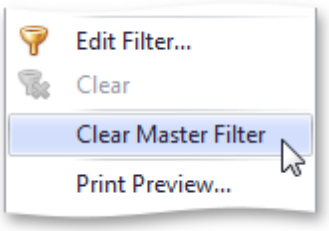
The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter).To learn more about the filtering concepts common to all dashboard items, see the Master Filtering topic.

When Master Filtering is enabled, you can click a shape (or multiple shapes by holding down the CTRL key) to make other dashboard items only display data related to the selected shape(s).



To learn how to enable Master Filtering in the Designer, see the Master Filtering topic.

To reset filtering, use the Clear Master Filter button (the icon) in the map's caption, or the Clear Master Filter command in the map's context menu.

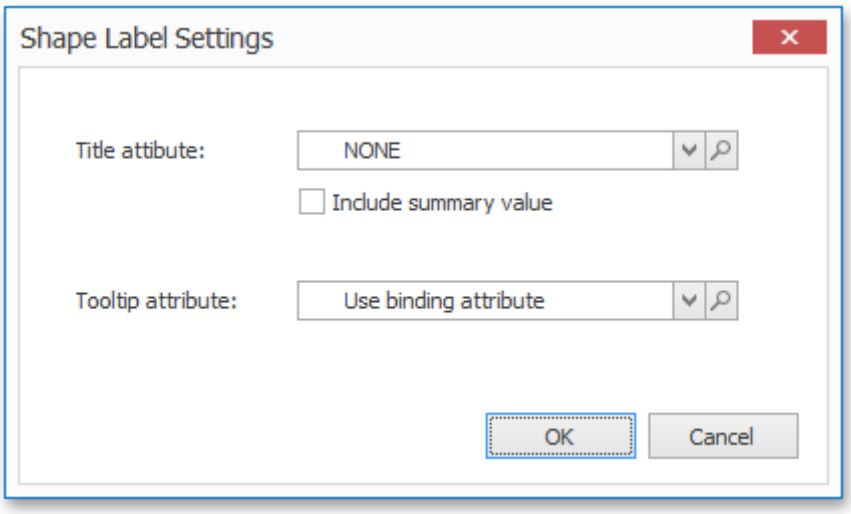


Labels

A Choropleth map provides the capability to display titles within map shapes and allows you to manage what data to show in the shape tooltips.

To manage map titles and tooltips, click the Shape Labels button in the Design ribbon tab.

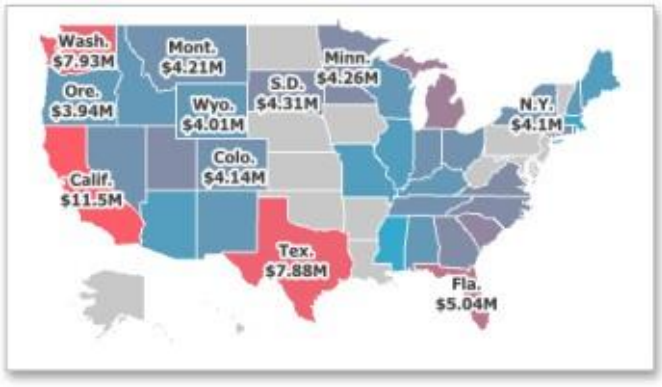
This invokes the Shape Label Settings dialog.



In this dialog, you can specify attributes whose values will be displayed within shapes and tooltips. Use the button to preview the available attributes and their values for the current map.

Shape Titles

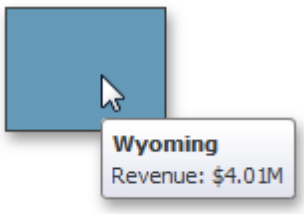
The Title attribute option allows you to select the attribute whose values are displayed within corresponding map shapes.



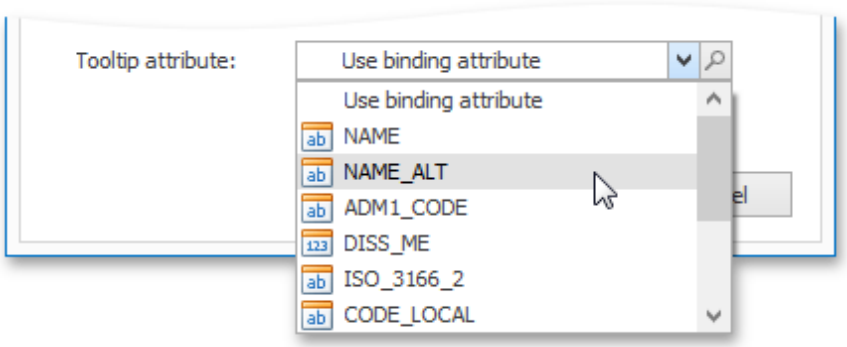
You can also use the Include summary value option to add summary values to shape titles.

Tooltips

The Choropleth Map dashboard item displays a tooltip that shows information related to a hovered shape.



You can choose whether to use a binding attribute to display as the title of shape tooltips (the Use binding attribute option) or specify a custom attribute using the Tooltip attribute option.



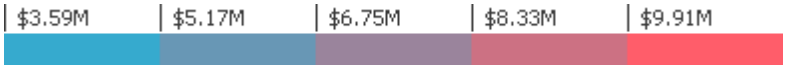
The Choropleth Map also allows you to add supplementary content to the tooltips using the TOOLTIP DATA ITEMS area. To learn more, see the Providing Data topic.

See Also

Providing Data

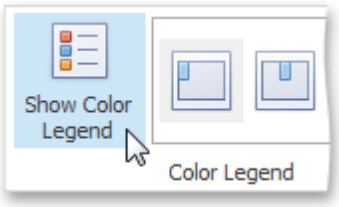
Legend

A legend is an element of a map that shows values corresponding to each color.



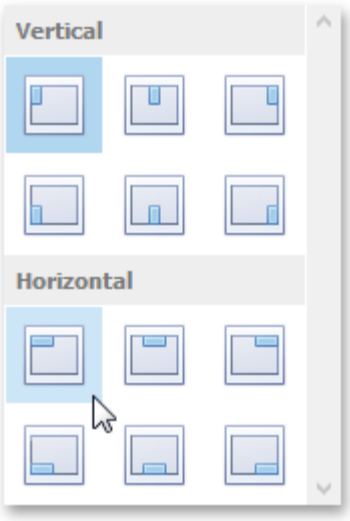
Visibility

To display a legend within a map, use the Show Legend button in the Legend group of the Design Ribbon tab.



Position and Orientation

To specify the legend's position and orientation, select one of the predefined options from the gallery in the Design Ribbon tab.



See Also

Map Coloring

Geo Point Maps

The topics in this section describe various types of Geo Point Map dashboard items that allow you to place callouts, bubbles or pies on the map using geographical coordinates.

This section consists of the following subsections.

[Map Types Overview]
Lists the available types of Geo Point maps and their features.

[Providing Maps]
Explains how to use default dashboard maps or provide custom maps.

[Geo Point Map] | [Bubble Map] | [Pie Map]
Describe specific capabilities of various Geo Point Map types.

[Clustering]
Describes the feature that enables grouping of neighboring map objects.

[Interactivity]
Describes features that enable interaction between the Geo Point maps and other dashboard items.

[Labels]
Describes how to display additional information related to map shapes.

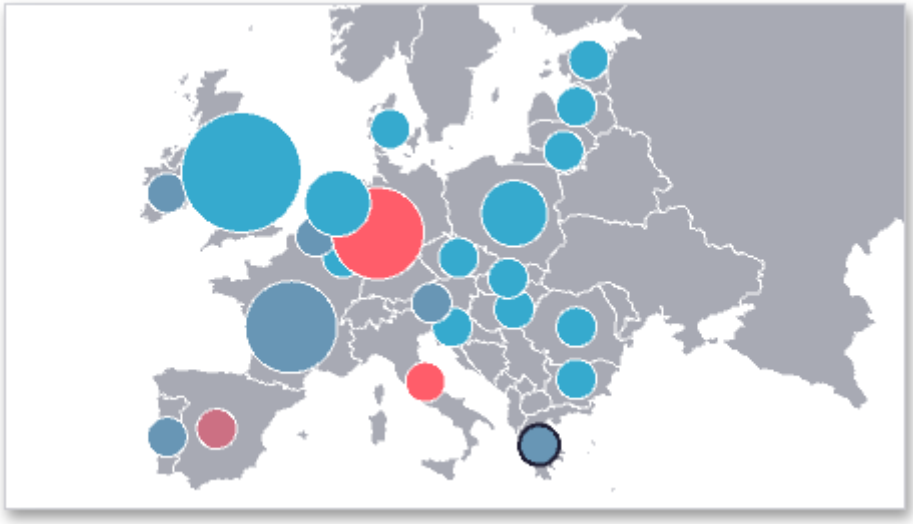
[Map Navigation]
Explains how to manage map zooming and scrolling.

Map Types Overview

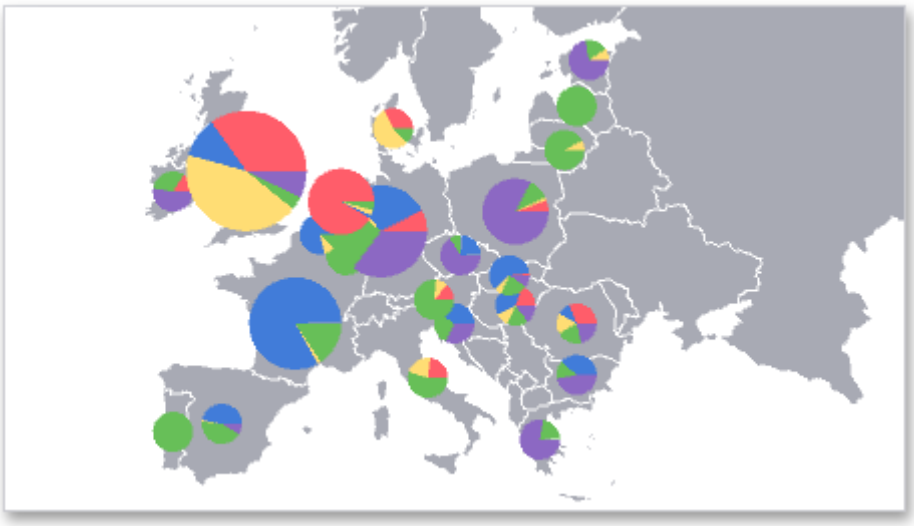
The Dashboard Designer allows you to create three types of Geo Point maps.

The **Geo Point Map** dashboard item allows you to place callouts on the map using geographical coordinates.

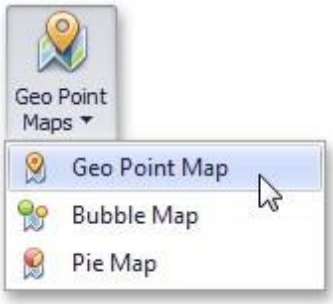
The **Bubble Map** dashboard item allows you to place bubbles on the map. Each bubble can represent data using its weight and color.



The **Pie Map** dashboard item allows you to display pies on the map. Each pie visualizes the contribution of each value to the total.



To create the required Geo Point Map dashboard item, use the Geo Point Maps button in the Home ribbon tab.



To learn more about common capabilities of all Geo Point map types, see the following topics.

[Providing Maps]
Explains how to use default dashboard maps or provide custom maps.

[Clustering]
Describes the feature that enables grouping of neighboring map objects.

[Interactivity]
Describes features that enable interaction between the Geo Point maps and other dashboard items.

[Labels]
Describes how to display additional information related to map shapes.

[Map Navigation]
Explains how to manage map zooming and scrolling.

Providing Maps

This document explains how to use the BI Dashboard maps or provide custom maps.

Default Maps

The BI Dashboard contains a set of default maps showing various parts of the world. The following maps are included.

World Countries - a world map.

Europe - a map of Europe.

Asia - a map of Asia.

North America - a map of North America. South America - a map of South America. Africa - a map of Africa.

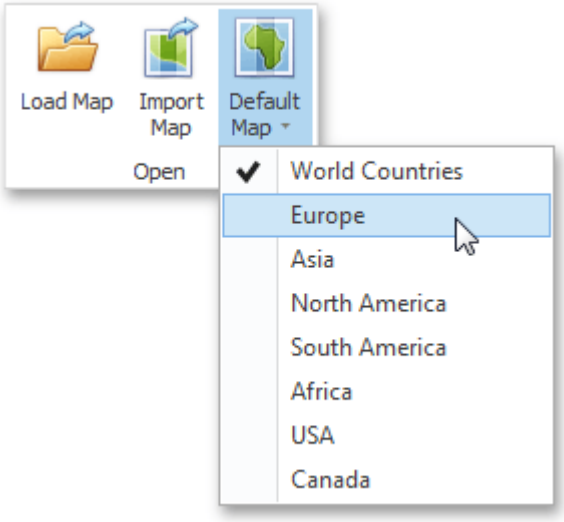
USA - a map of the USA.

Canada - a map of Canada.

Note

Note that the **World Countries** map has a lower level of detail than maps of specific regions and may not contain some countries. As an alternative, you can load a custom map with the required granularity.

To select the default map, use the Default Map button in the Design ribbon tab.



As an alternative, use the corresponding command in the map's context menu.

Custom Maps

A **Shapefile** vector format to provide custom maps. Commonly, this format includes two file types.

.shp file - holds map shapes (points/lines/polygons).

.dbf file - contains attributes for each shape.

To open an existing shapefile, use the Load Map or Import Map button in the Ribbon, or the command in the context

menu (Load Map... or Import Map...).

In the invoked dialog, locate the required .shp file. Note that custom maps created in the Cartesian coordinate system are not supported.

Note

If the map is opened using the **Load Map** button, the dashboard XML definition will contain the path to a map shapefile. If the map is opened using the **Import Map** button, the dashboard XML definition will contain the map itself.

Geo Point Map

The Geo Point Map dashboard item allows you to place callouts on the map using geographical coordinates.

Topics in this section describe specific capabilities of the Geo Point Map dashboard item.

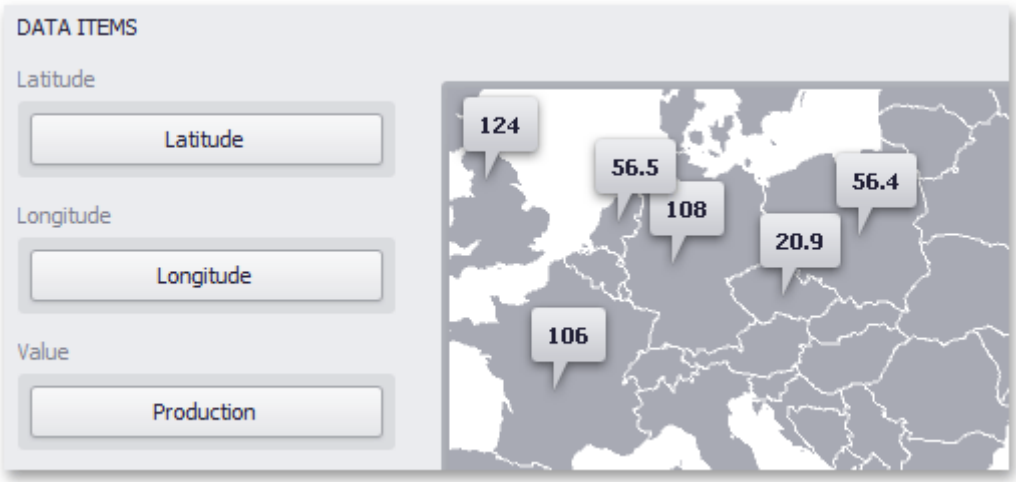
[Providing Data]

Providing Data

This topic describes how to bind the Geo Point Map dashboard item to data using the Dashboard Designer.

The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner (see Binding Dashboard Items to Data for details). The only difference is in the data sections that these dashboard items have.

The image below shows a sample Geo Point Map dashboard item that is bound to data.



Note that the Geo Point Map provides two data item groups for data binding: DATA ITEMS and TOOLTIP DATA ITEMS. Tables below list the available data sections.

Data items

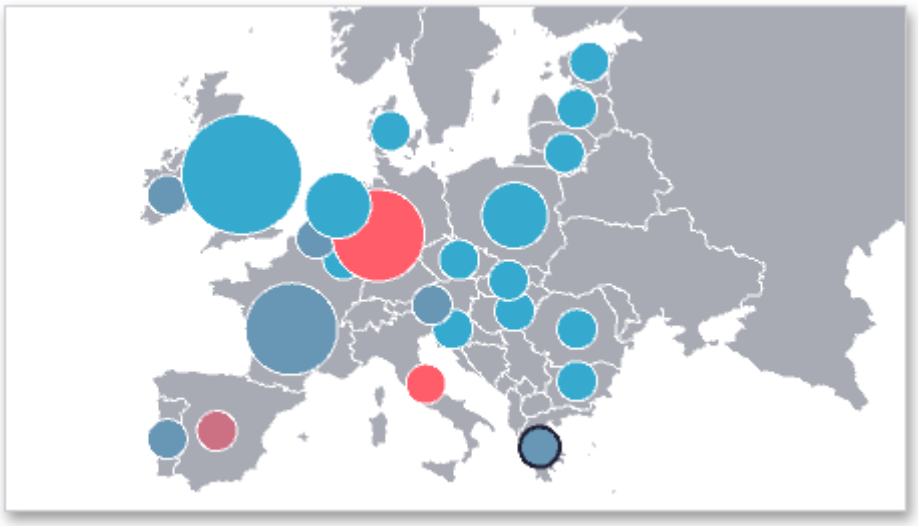
Section	Description
Latitude	Accepts a dimension used to provide geographic latitude.
Longitude	Accepts a dimension used to provide geographic longitude.
Value	Accepts values related to geographic points. These values are displayed within map callouts.

TOOLTIP DATA ITEMS

Section	Description
Dimensions	Accepts dimensions allowing you to add supplementary content to the tooltips.
Measures	Accepts measures allowing you to add summaries to the tooltips.

Bubble Map

The Bubble Map dashboard item allows you to place bubbles on the map. Each bubble can represent data using its weight and color.



Topics in this section describe specific capabilities of the Bubble Map dashboard item.

Providing

Data

Coloring

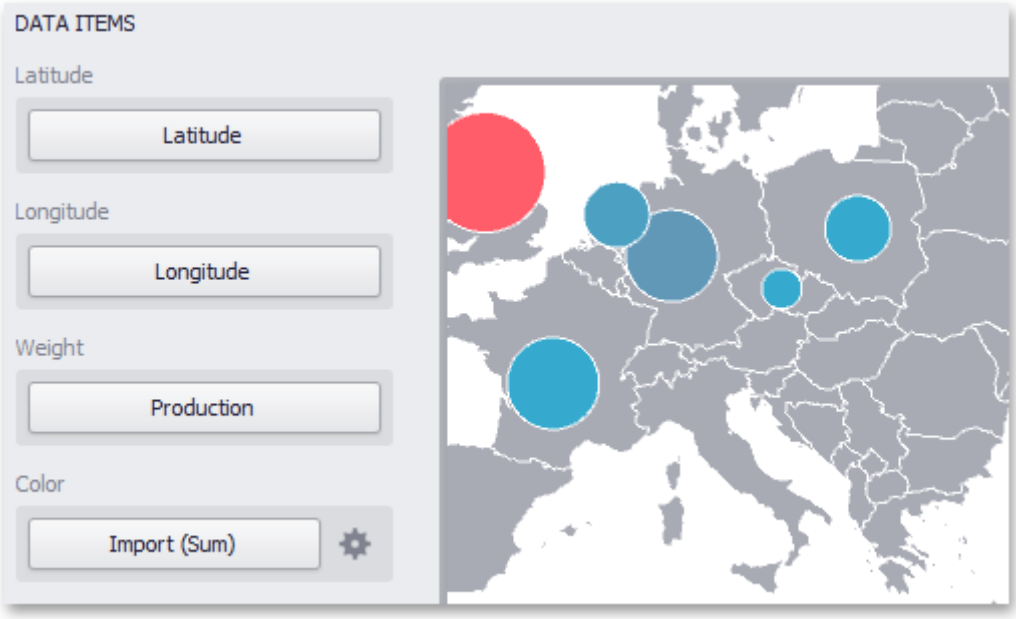
Legends

Providing Data

This topic describes how to bind the Bubble Map dashboard item to data using the Dashboard Designer.

The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner (see Binding Dashboard Items to Data for details). The only difference is in the data sections that these dashboard items have.

The image below shows a sample Bubble Map dashboard item that is bound to data.



Note that the Bubble Map provides two data item groups for data binding: DATA ITEMS and TOOLTIP DATA ITEMS. Tables below list the available data sections.

Data items

Latitude - Accepts a dimension used to provide geographic latitude.

Longitude - Accepts a dimension used to provide geographic longitude.

Weight - Accepts a measure used to evaluate the bubble's weight.

Color - Accepts a measure used to evaluate the bubble's color.

The Bubble Map dashboard item automatically selects palette and scale settings used to color bubbles. To customize these settings, click the **Options** button next to the **Color** placeholder. This invokes the **Color Scale Options** dialog, which allows you to specify the palette and scale options. To learn how to use this dialog, see Coloring.

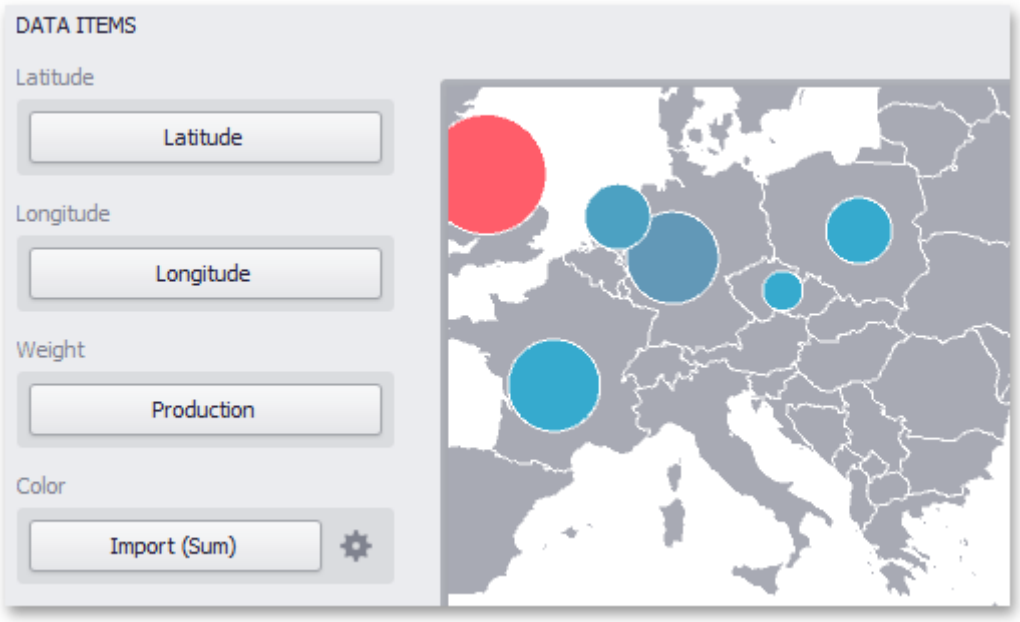
Tooltip data items

Dimensions - Accepts dimensions allowing you to add supplementary content to the tooltips.

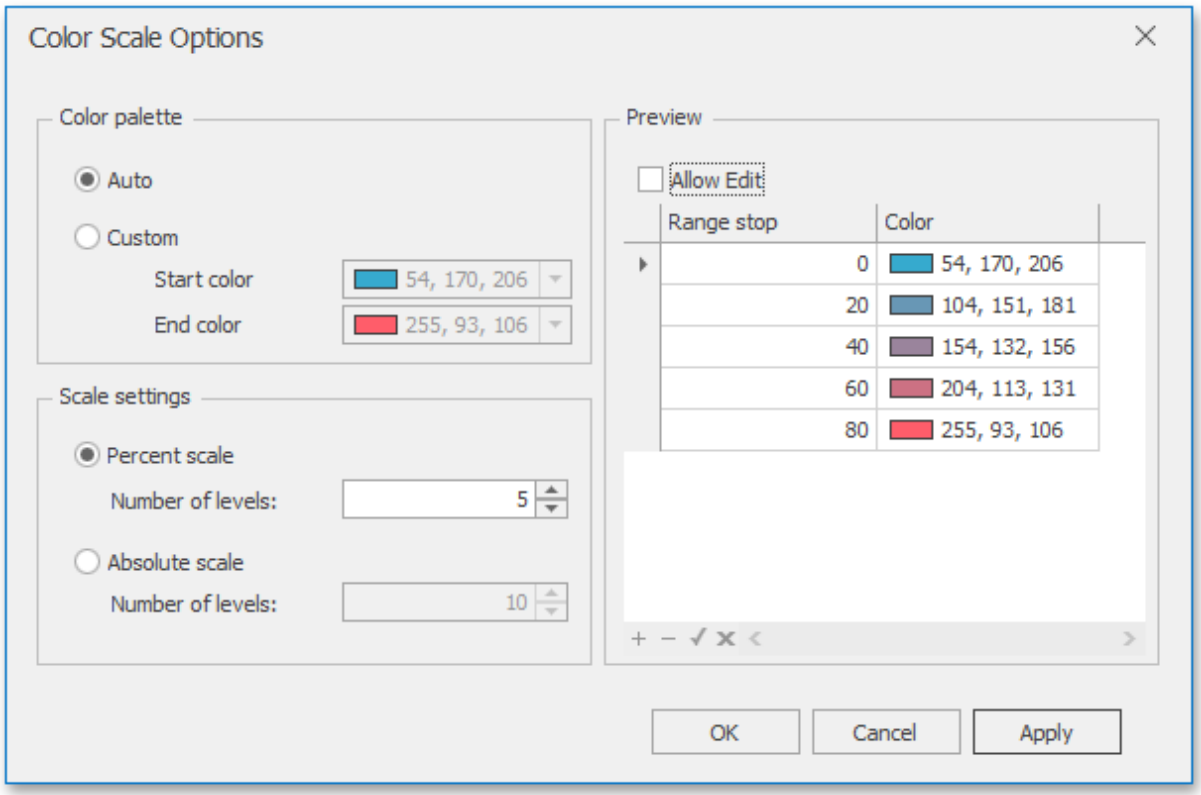
Measures - Accepts measures allowing you to add summaries to the tooltips.

Coloring

The Bubble Map dashboard item automatically selects palette and scale settings used to color bubbles depending on the provided values.



To customize these settings, click the Options button next to the Color placeholder. This invokes the Color Scale Options dialog, which allows you to specify the palette and scale options.



You can specify the following settings in this window.

Color palette - allows you to specify the start and end color of the palette.

Scale settings - specifies whether a percent scale or an absolute scale is used to define a set of colors. You can specify the number of levels that represent the number of colors used to color the map.

Preview is used to display a full set of palette colors generated based on the start/end colors and the number of levels. Use the **Allow Edit** check box to automatically change the generated colors or specify value ranges for each color.

Legends

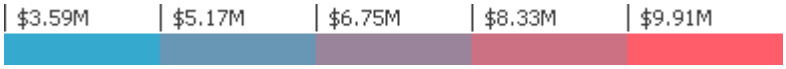
Bubble Map provides two types of legends used to identify map objects - color and weighted legends.

Color Legend

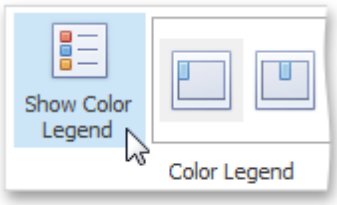
Weighted Legend

Color Legend

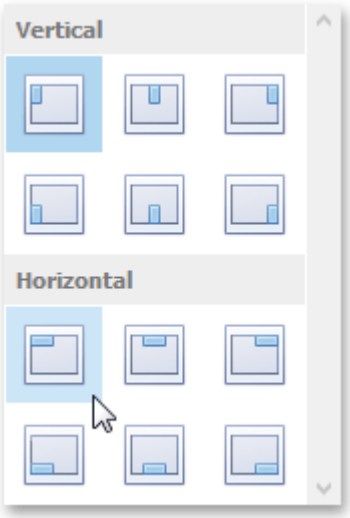
The color legend helps you to identify which colors correspond to specific values.



To display a color legend within a map, use the **Show Color Legend** button in the **Color Legend** section of the **Design** Ribbon tab.

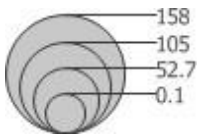


To specify the legend's position and orientation, select one of the predefined options from the gallery in the Design Ribbon tab.

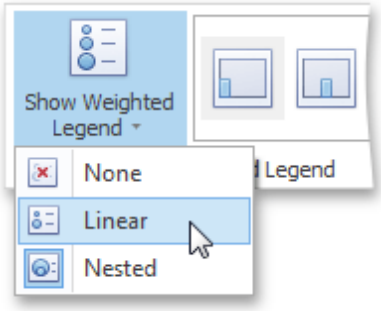


Weighted Legend

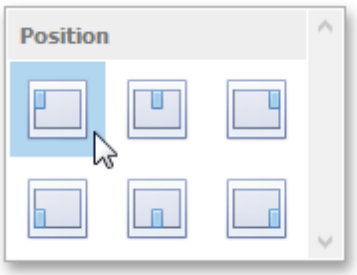
The weighted legend allows you to identify values corresponding to specific bubble sizes.



To select the required weighted legend type, use the Show Weighted Legend button in the Weighted Legend section of the Design Ribbon tab.

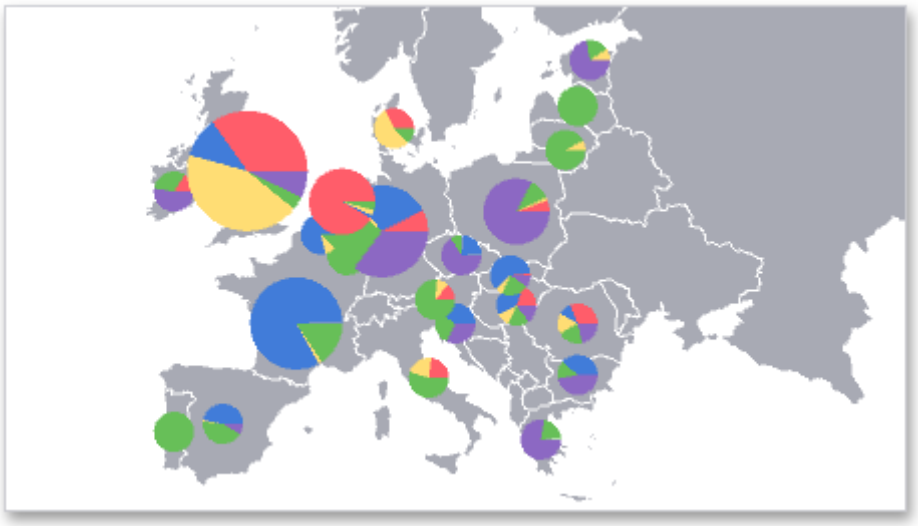


To specify the legend's position, select one of the predefined options from the gallery in the **Design** Ribbon tab.



Pie Map

The Pie Map dashboard item allows you to display pies on the map. Each pie visualizes the contribution of each value to the total.



Topics in this section describe specific capabilities of the Pie Map dashboard item.

Providing

Data Pie

Options

Coloring

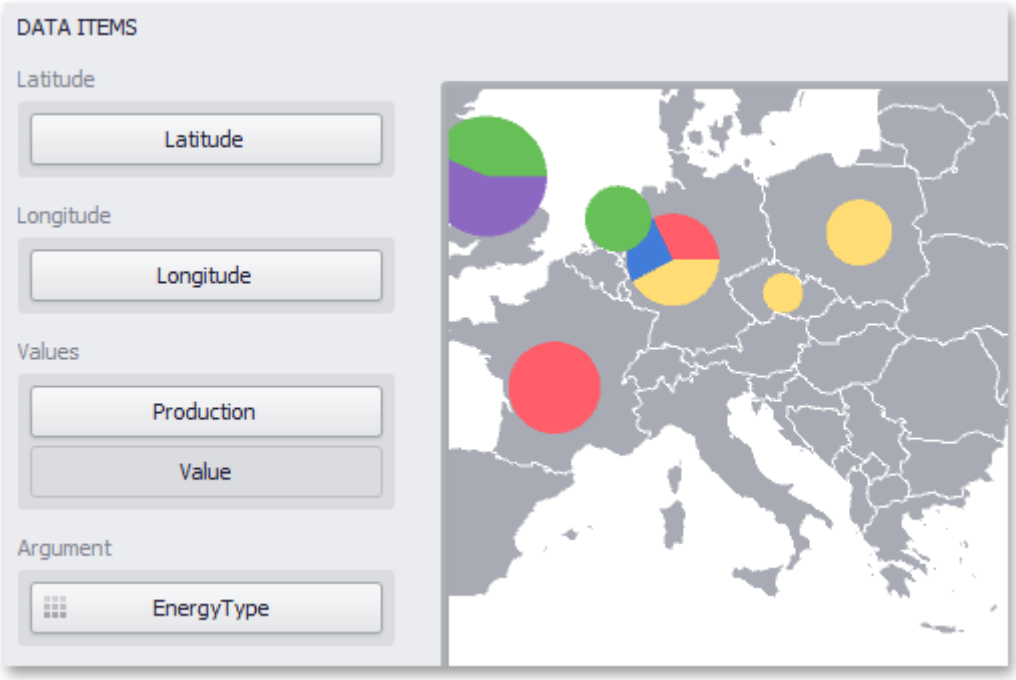
Legends

Providing Data

This topic describes how to bind the Pie Map dashboard item to data using the Dashboard Designer.

The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner (see Binding Dashboard Items to Data for details). The only difference is in the data sections that these dashboard items have.

The image below shows a sample Pie Map dashboard item that is bound to data.



Note that the Pie Map provides two data item groups for data binding: DATA ITEMS and TOOLTIP DATA ITEMS. Tables below list the available data sections.

Data items

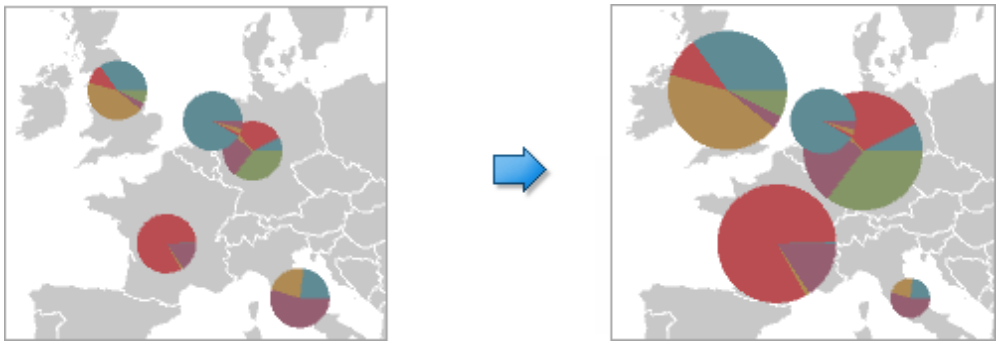
Section	Description
Latitude	Accepts a dimension used to provide geographic latitude.
Longitude	Accepts a dimension used to provide geographic longitude.
Values	Accepts measures used to calculate pie values. In case of negative measure values, Pie Map uses their absolute values. If you added a data item to the **Argument** section and several data items to the **Values** section, you can use the **Values** drop-down menu to switch between the provided values. To invoke the **Values** menu, click the icon in the map's caption or use the map's context menu.
Argument	Allows you to provide data for pie arguments.

TOOLTIP DATA ITEMS

Section	Description
Dimensions	Accepts dimensions allowing you to add supplementary content to the tooltips.
Measures	Accepts measures allowing you to add summaries to the tooltips.

Pie Options

The Pie Map dashboard item allows you to take into account the weight of pies. In this case, the relative sizes of the pies depend on the corresponding summary values.

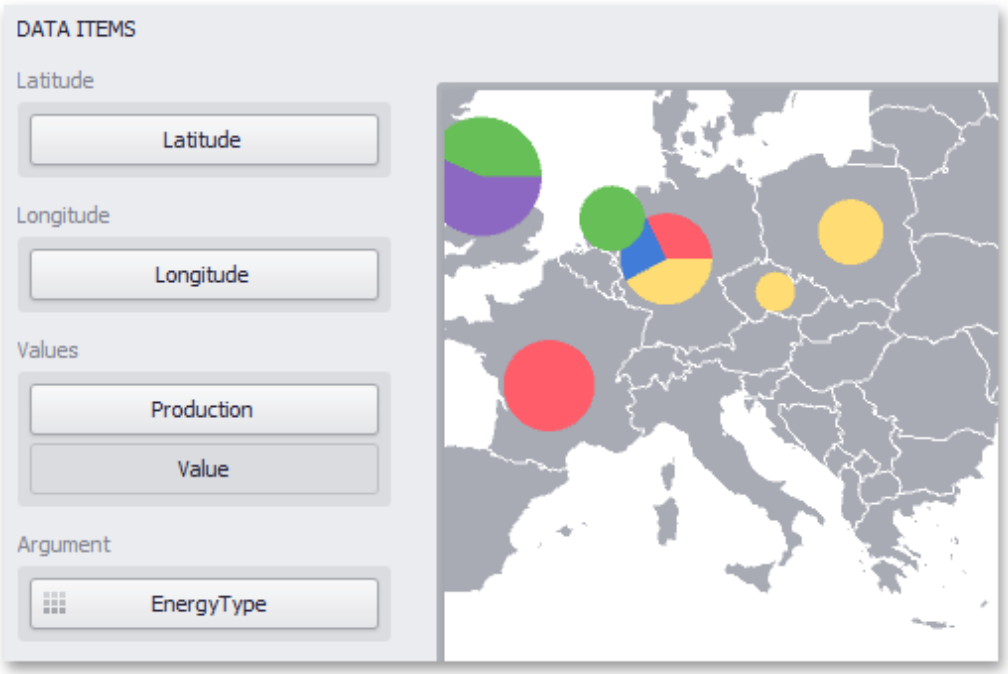


To enable this capability, use the Weighted Pies button in the Design ribbon tab.

Coloring

Certain dashboard items provide the capability to color dashboard item elements by associating dimension values/ measures and specified colors. You can choose whether to use a global color scheme to provide consistent colors for identical values or specify a local color scheme for each dashboard item. To learn more about coloring concepts common for all dashboard items, see the Coloring section.

The Pie Map dashboard item allows you to manage the coloring of segments corresponding to various dimension values/measures. For instance, the image below illustrates the Pie Map dashboard item whose argument values are colored by hue.



Legends

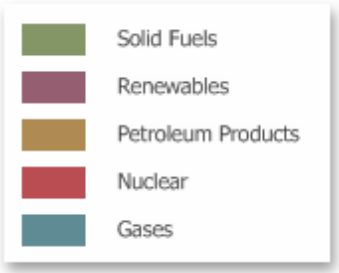
The Pie Map provides two types of legends used to identify map objects - color and weighted legends.

Color Legend

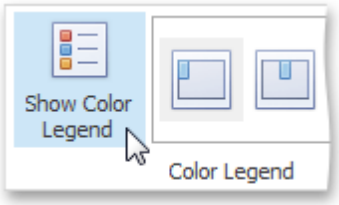
Weighted Legend

Color Legend

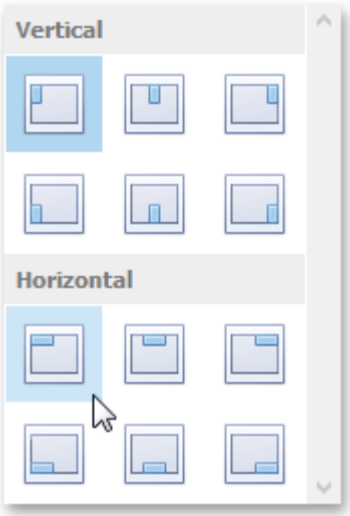
The color legend helps you to identify which colors correspond to specific argument values.



To display a color legend within a map, use the Show Color Legend button in the Color Legend section of the Design Ribbon tab.

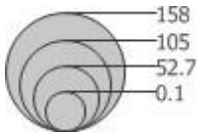


To specify the legend's position and orientation, select one of the predefined options from the gallery in the Design Ribbon tab.



Weighted Legend

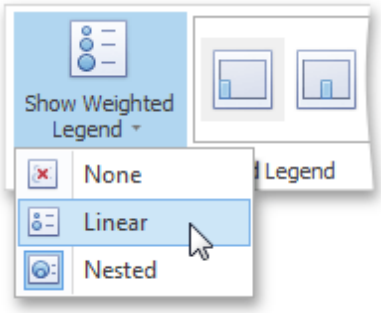
The weighted legend allows you to identify values corresponding to specific pie sizes.



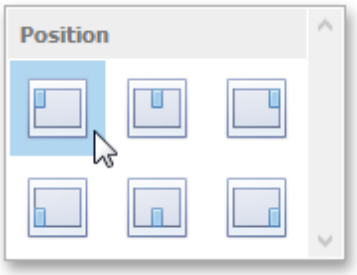
Note

The Pie Map dashboard item does not display the weighted legend if weighed pies are disabled.

To select the required weighted legend type, use the Show Weighted Legend button in the Weighted Legend section of the Design Ribbon tab.



To specify the legend's position, select one of the predefined options from the gallery in the **Design** Ribbon tab.



Clustering

When a Geo Point map contains a large number of objects (callouts, bubbles or pies), showing each object individually on the map is not useful. The Dashboard Designer provides the capability to group neighboring map objects. This feature is called Clustering.

For instance, the Geo Point Map dashboard item combines callouts to bubbles.

The Bubble Map and Pie Map dashboard items cluster bubbles/pies with other bubbles/pies.

To enable clustering in the Designer, use the Enable Clustering button in the Data ribbon tab.

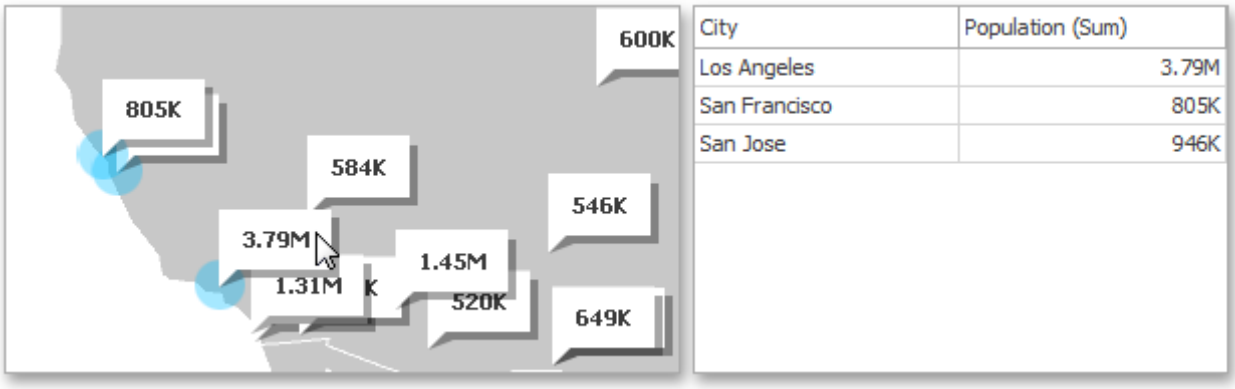
Interactivity

This document describes the Master Filtering capability, which enables interaction between the Geo Point Map and other dashboard items.

Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more about the filtering concepts common to all dashboard items, see the Master Filtering topic.

When Master Filtering is enabled, you can click a callout/bubble/pie (or multiple callouts/bubbles/pies by holding down the CTRL key) to make other dashboard items only display data related to the selected callout(s)/bubble(s)/ pie(s).



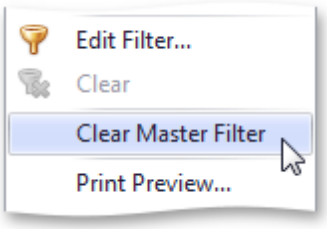
City	Population (Sum)
Los Angeles	3.79M
San Francisco	805K
San Jose	946K

Note

When you select a clustered bubble or pie, master filtering is applied by all points that are clustered into this bubble/pie.

To learn how to enable Master Filtering in the Designer, see the Master Filtering topic.

To reset filtering, use the **Clear Master Filter** button (the icon) in the map's caption, or the **Clear Master Filter** command in the context menu.



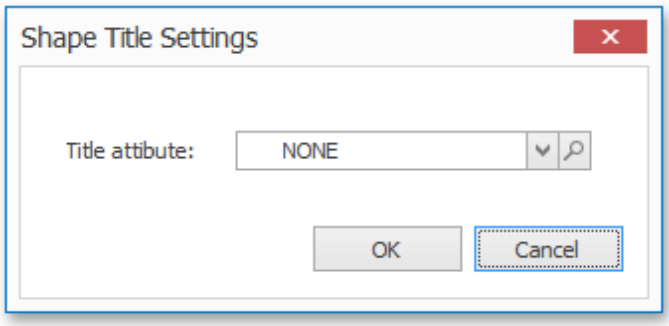
Labels

Geo Point maps provide the capability to display titles within map shapes and allows you to add supplementary content to the callout/bubble/pie tooltips.

Shape Titles

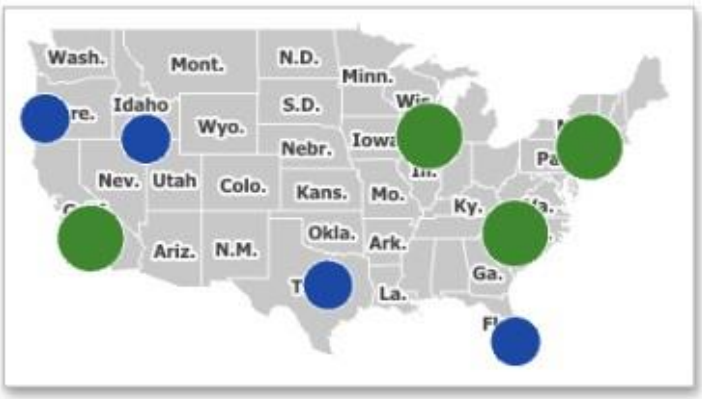
To manage map titles, click the **Shape Title** button in the **Design** ribbon tab.

This invokes the **Shape Title Settings** dialog.



In this dialog, you can specify attributes whose values will be displayed within shapes. Use the button to preview the available attributes and their values for the current map.

The **Title attribute** option allows you to select the attribute whose values are displayed within corresponding map shapes.



Tooltips

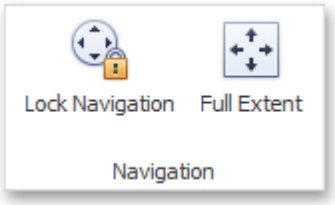
Geo Point maps also allow you to add supplementary content to the callout/bubble/pie tooltips using the TOOLTIP DATA ITEMS area. To learn more, see the Tooltip Data Items paragraph in the Providing Data topic.

Map Navigation

Geo Point maps allow you to perform navigation actions such as zooming and scrolling.

The Dashboard Designer allows you to specify the initial zooming/scrolling state for the Geo Point map using the mouse.

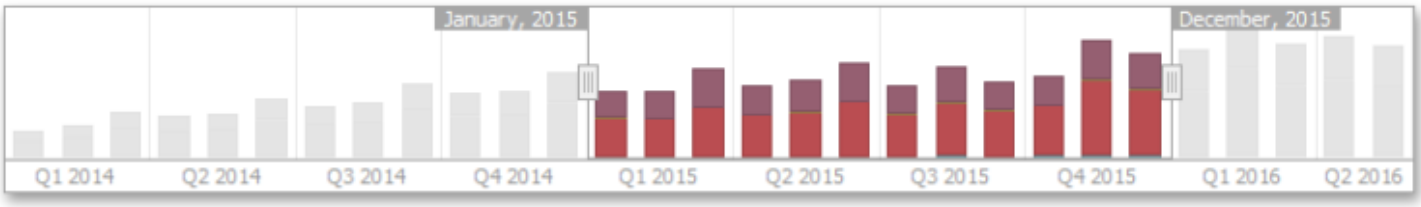
You can disable the capability to scroll/zoom the map using the Lock Navigation button in the Design ribbon tab.



Use the **Full Extent** button to display the entire map within the dashboard item.

Range Filter

The Range Filter dashboard item allows you to apply filtering to other dashboard items. This item displays a chart with selection thumbs that allow you to filter out values displayed along the argument axis.



This section consists of the following subsections.

Providing Data

Explains how to supply the Range Filter dashboard item with data.

Series

Enumerates and describes different types of series that can be displayed within the Range Filter dashboard item.

Interactivity

Describes features that enable interaction between the Range Filter and other dashboard items.

Predefined Ranges

Shows you how to add predefined date-time periods that can be used to perform a selection (for instance, year-to-date or qu arter-to-date).

Coloring

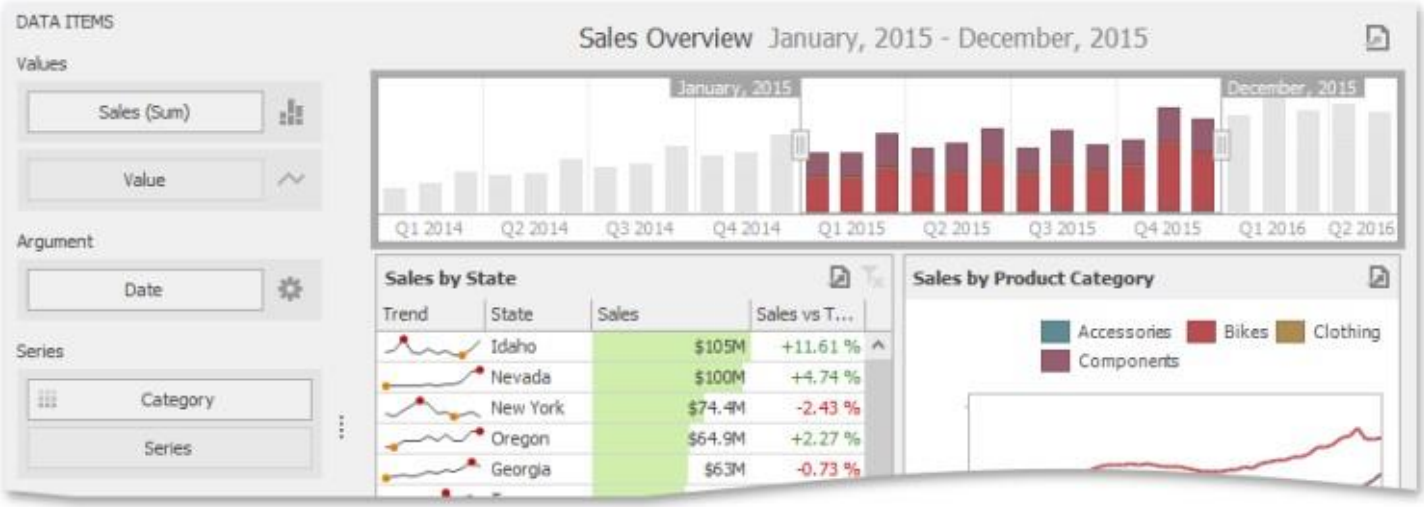
Describes coloring capabilities of the Range Filter dashboard item.

Providing Data

The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic.

The only difference is in the data sections that the required dashboard item has. This topic describes how to bind a Range Filter dashboard item to data in the Designer.

The image below shows a sample Range Filter dashboard item that is bound to data.



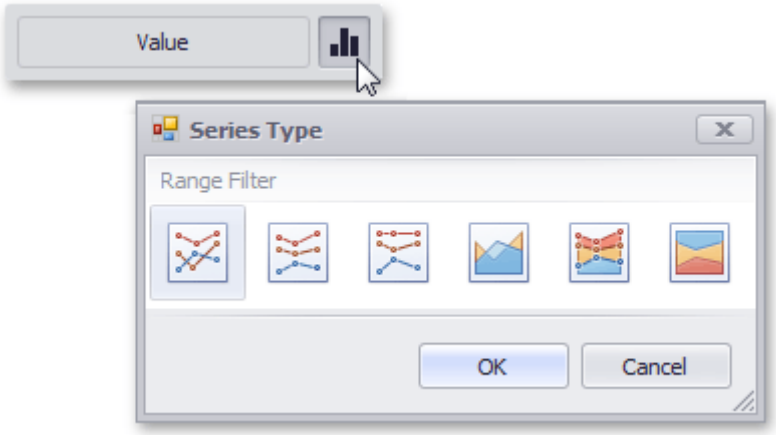
To bind the Range Filter dashboard item to data, drag and drop a data source field to a placeholder contained in one of the available data sections. A table below lists and describes Range Filter data sections.

Section	Description
Values	Contains data items against which the Y-coordinates of data points are calculated.
Argument	Contains a data item that provides values displayed along the horizontal axis of the Range Filter. Filtering is performed based on these values. Note that the Options button (the ⚙ icon) allows you to create predefined ranges used to select the required date-time interval.
Series	Contains data items whose values are used to create chart series.

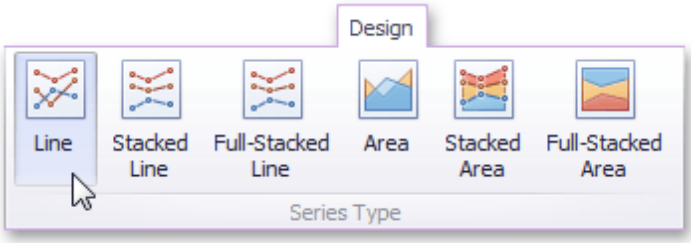
Series

The Range Filter dashboard item supports various Line and Area series types.

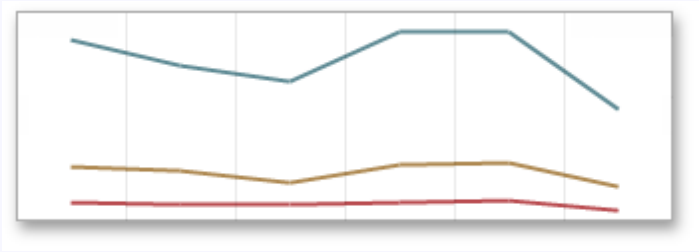
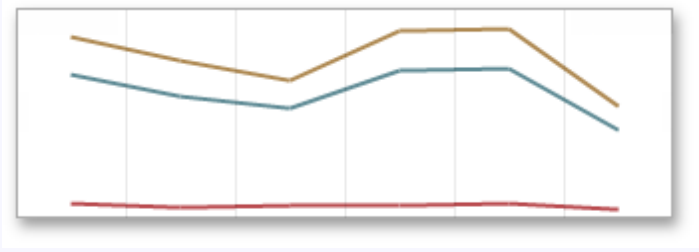
To switch between series types in the Designer, click the options button next to the required data item in the Values section. In the invoked Series Type dialog, select the required series type and click OK.

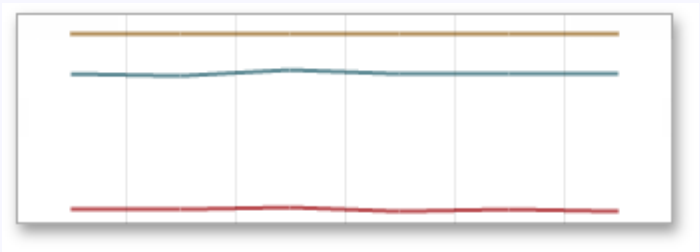
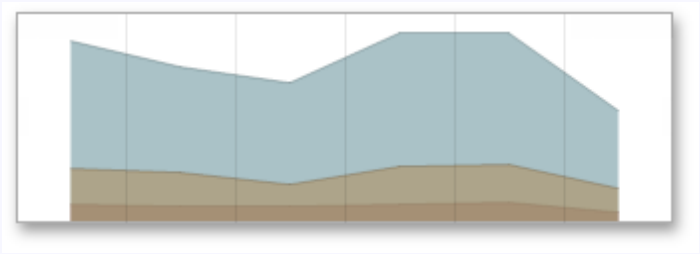
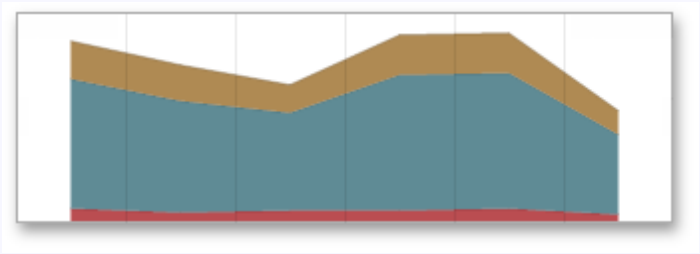
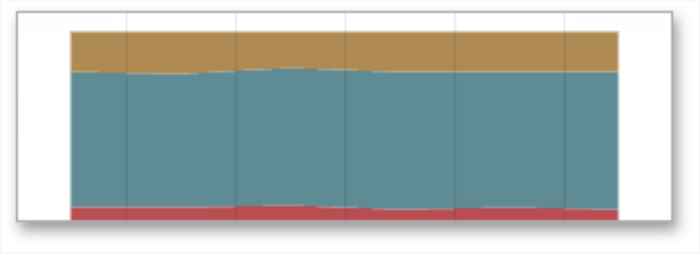


You can also do this using the buttons in the **Series Type** group of the **Design** Ribbon tab.



The Range Filter supports the following series types.

Line	
Stacked Line	

Full-Stacked Line	
Area	
Stacked Area	
Full-Stacked Area	

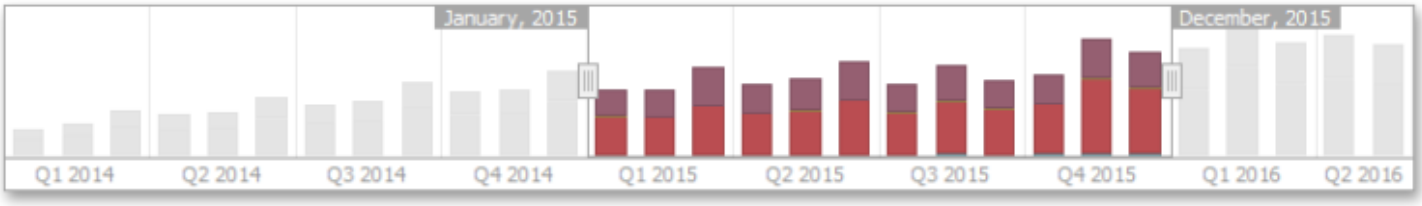
Interactivity

This document describes the features that enable interaction between the Range Filter and other dashboard items. These features include Master Filtering.

Master Filtering

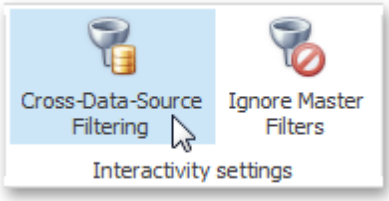
The Dashboard allows you to use any data-aware dashboard item as a filter for other dashboard items (**Master Filter**). To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

Master filtering is always enabled for the Range Filter dashboard item. This Range Filter displays a chart with selection thumbs that allow you to filter out values displayed along the argument axis.



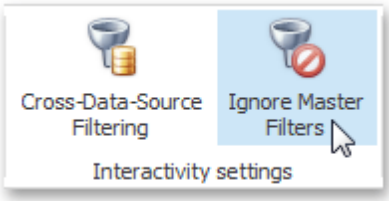
To enable filtering across data sources for the Range Filter, use the Cross-Data-Source Filtering button in the

Data Ribbon tab.



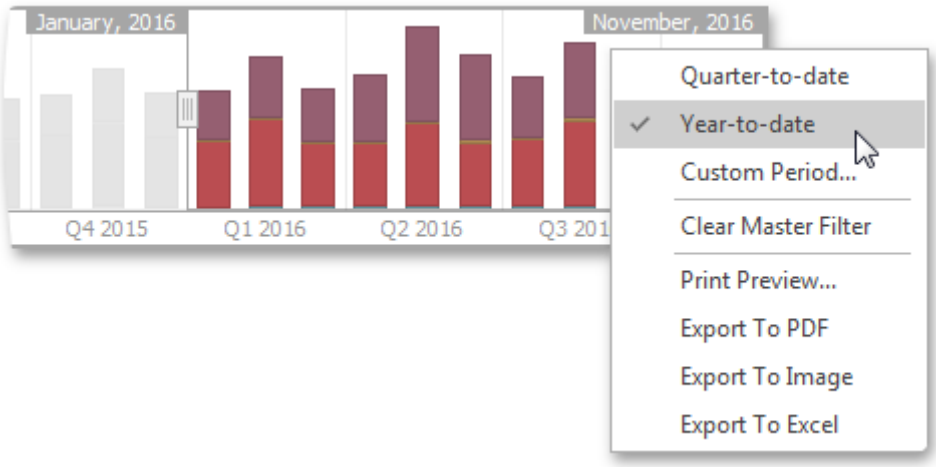
You can enable/disable ignoring of other master filter items using the Ignore Master Filters button in the Data

Ribbon tab.

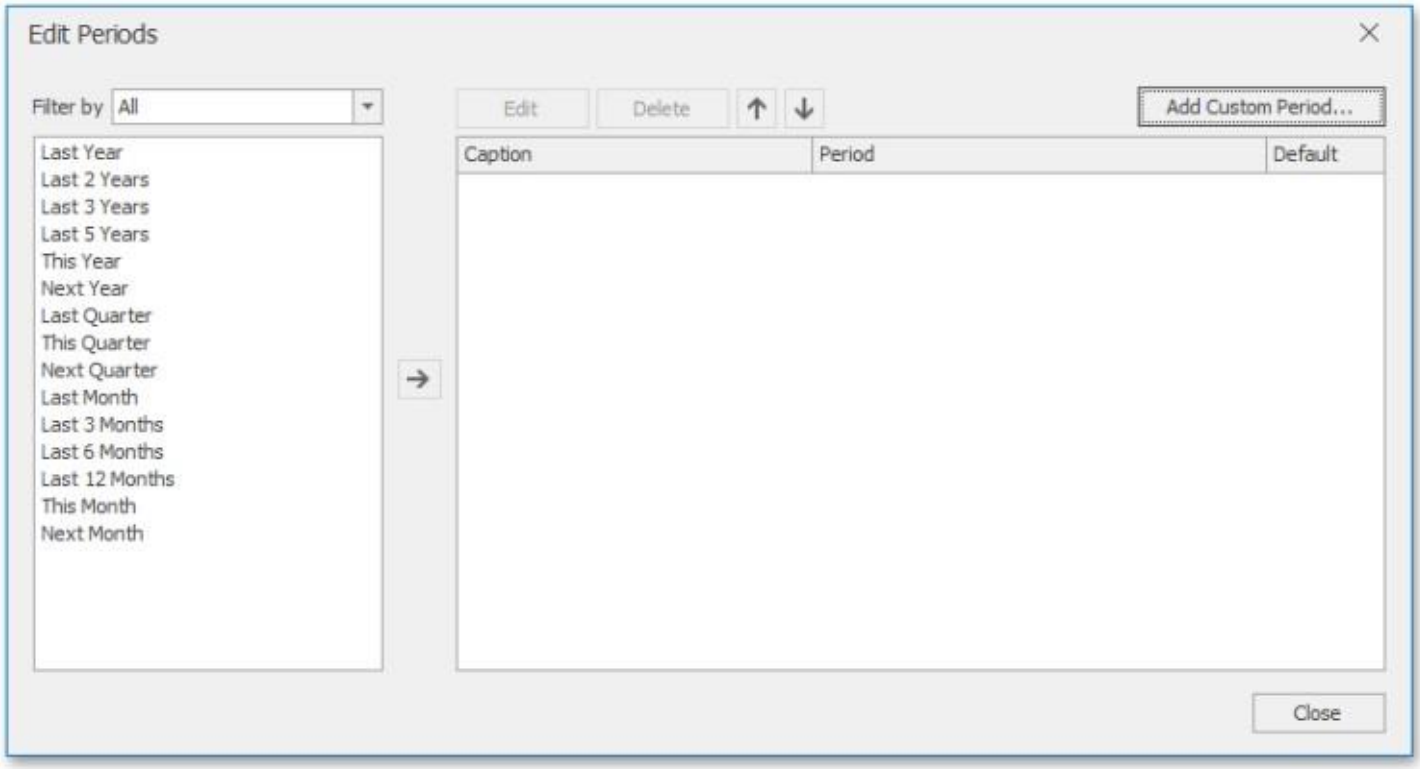


Predefined Ranges

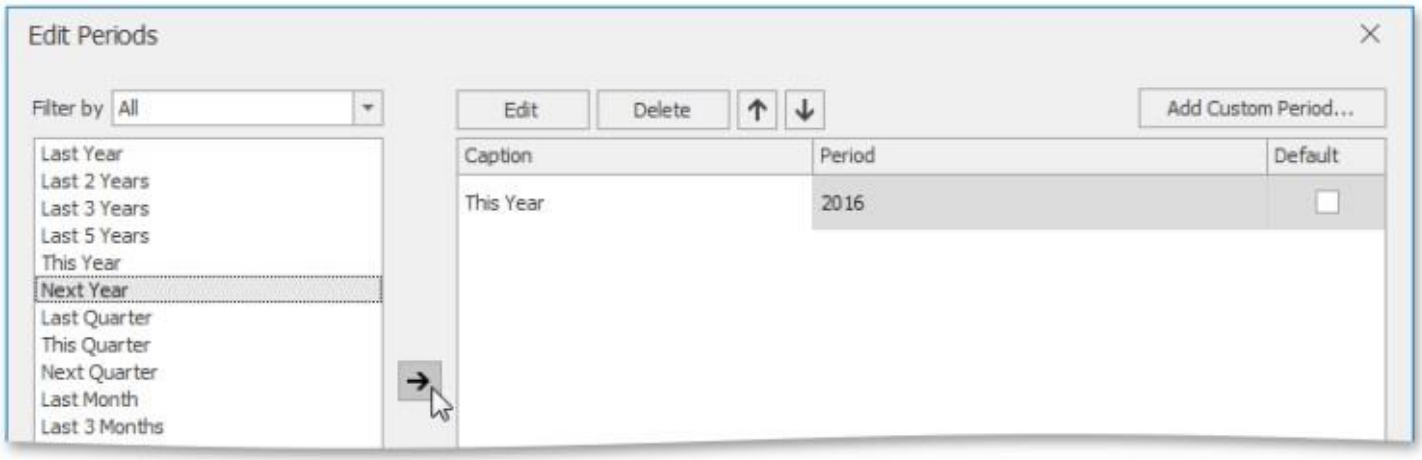
The Range Filter dashboard item allows you to add a number of predefined date-time periods that can be used to perform a selection (for instance, year-to-date or qu arter-to-date).



To add a period, click the Option s button (the ⚙ icon) next to the Argument placeholder or use the Edit Periods button in the ribbon's Design tab. This invokes the Edit Periods dialog.



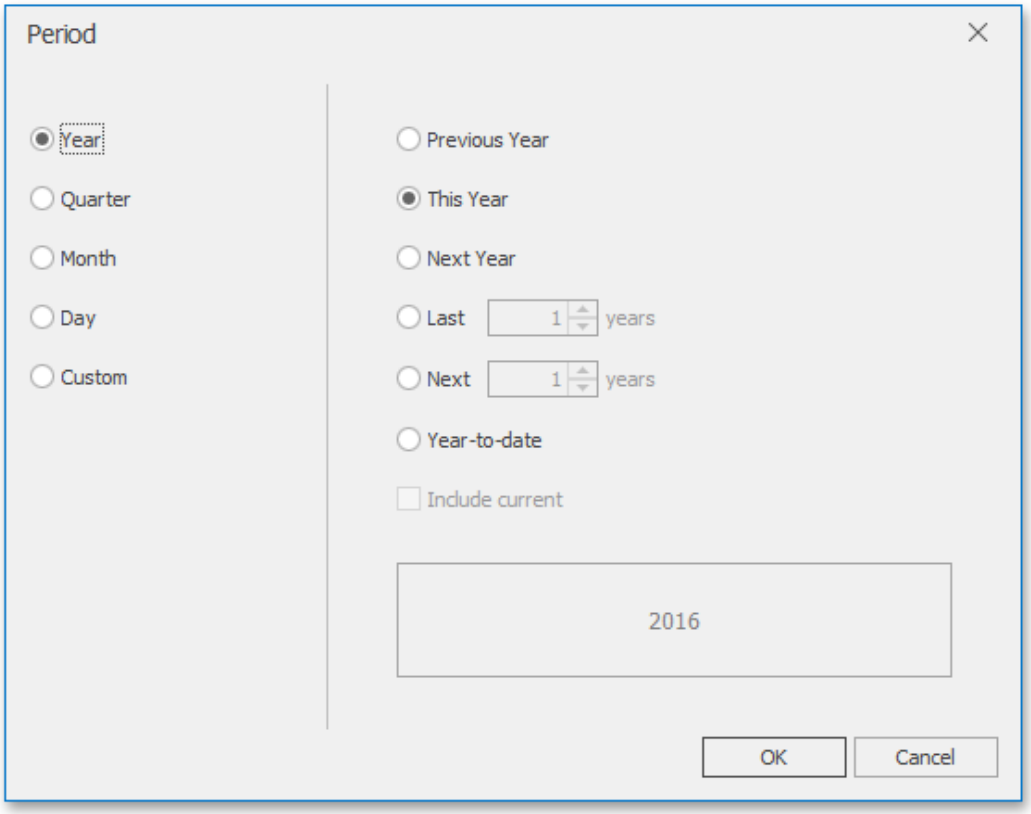
To add the selected period, use the → button or double-click this period.



This period will be added to the right pane of the Edit Periods dialog. The following settings are available for the added period.

- **Caption** - Specifies the caption corresponding to the period.
- **Period** - Displays the date-time interval corresponding to the period.
- **Default** - Allows you to use the selected period as the default selection in the Range Filter dashboard item.

If necessary, you can customize the selected period by clicking the **Edit** button in the Edit Periods dialog. This invokes the **Period** dialog.



Note

Note that the **Edit** dialog above contains the displayed periods (**Year**, **Quarter**, **Month**, **Day**) if the group interval of the Range Filter argument is set to **Day-Month-Year**.

This dialog allows you to add the following periods.

Year - A period duration is measured in years.

Previous Year - Identifies the entire previous year.

- **This Year** - Identifies the entire current year.

Next Year - Identifies the entire next year.

Last Years - Identifies a specific number of previous years. Use the **Include current** option to specify whether or not the period is ended with the current year.

Next Years - Identifies a specific number of next years. Use the **Include current** option to specify whether or not the period is started from the current year.

Year-to-date - A period from the beginning of the current year and up to the current day.

Quarter - Period duration is measured in quarters.

- **Previous Quarter** - Identifies the entire previous
- quarter. **This Quarter** - Identifies the entire current

quarter.

Next Quarter - Identifies the entire next quarter.

Last Quarter - Identifies a specific number of previous quarters. Use the **Include current** option to specify whether or not the period ends with the current quarter.

Next Quarter - Identifies a specific number of following quarters. Use the **Include current** option to specify whether or not the period starts from the current quarter.

Quarter-to-date - A period from the beginning of the current quarter and up to the current day.

Month - Period duration is measured in months.

- **Previous Month** - Identifies the entire previous
- month. **This Month** - Identifies the entire current

month.

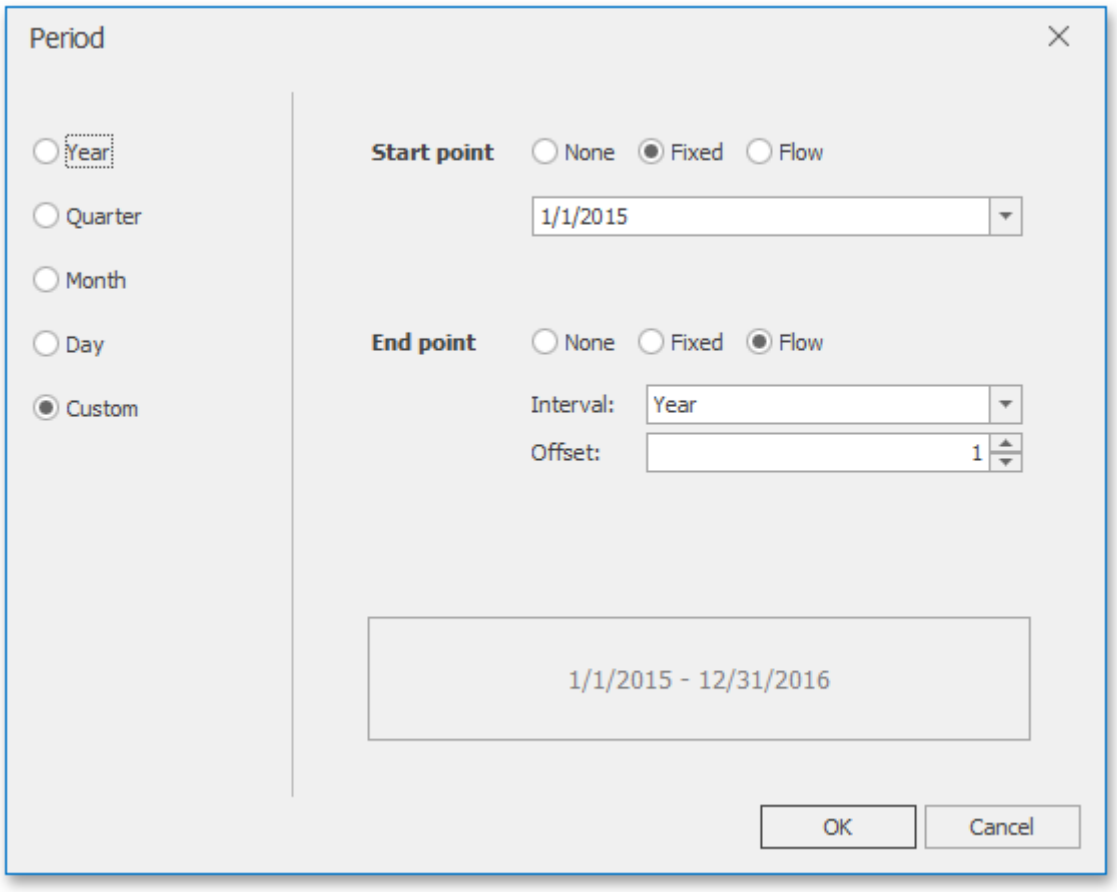
- **Next Month** - Identifies the entire next month.
- **Last Month** - Identifies a specific number of previous months. Use the **Include current** option to specify whether or not the period ends with the current month.
- **Next Month** - Identifies a specific number of the following months. Use the **Include current** option to specify whether or not the period starts with the current month.
- **Month-to-date** - A period from the beginning of the current month and up to the current day.

- **Day** - Period duration is measured in days.
  - **Previous Day** - Identifies the entire previous
  - day. **This Day** - Identifies the entire current

    day.
  - **Next Day** - Identifies the entire next day.
  - **Last Day** - Identifies a specific number of previous days. Use the **Include current** option to specify whether or not the period ends with the current day.
  - **Next Day** - Identifies a specific number of the following days. Use the **Include current** option to specify

whether or not the period starts with the current day.

- **Custom** - A custom period.
  - Allows you to specify a period with the custom boundaries (**Start point** and **End point**)



You can specify the following settings for the start/end boundaries. **None** - The selection will begin from the start/end of

- the visible range. **Fixed** - Allows you to select a specific date value
- using the calendar.
- **Flow** - Allows you to select a relative date value. The **Interval** option specifies the interval between the current date and the required date. The **Offset** option allows you to set the number of such intervals.

Note

Note that the **Offset** option can accept negative and positive values. Negative values correspond to dates before the current date, while positive values correspond to future dates.

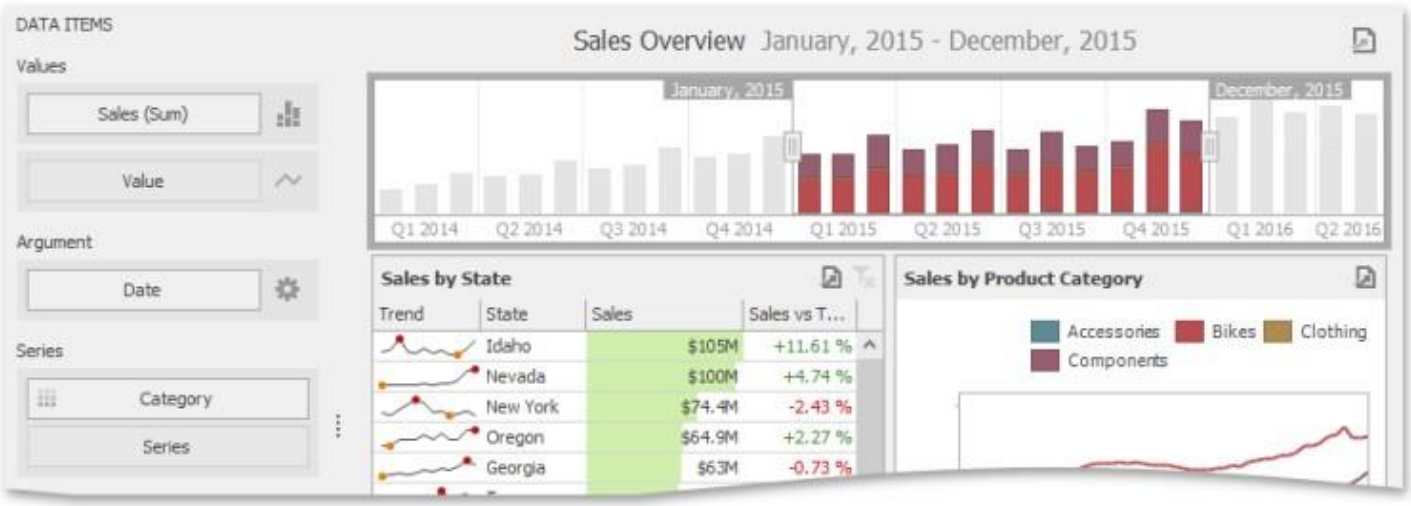
See Also

Interactivity

Coloring

Certain dashboard items provide the capability to color dashboard item elements by associating dimension values/ measures and specified colors. You can choose whether to use a global color scheme to provide consistent colors for identical values or specify a local color scheme for each dashboard item. To learn more about coloring concepts common for all dashboard items, see the Coloring section.

By default, the Range Filter dashboard item colors different measures and series dimensions by hue. The image below illustrates the Range Filter dashboard item whose series points corresponding to different categories are colored in different colors.



Images

The Dashboard Designer allows you to add images to a dashboard.

You can either add a static image or you can use the Bound Image as a detail item along with the Master Filtering feature.

Image Types

Overview Providing

Images

Interactivity

Image Settings

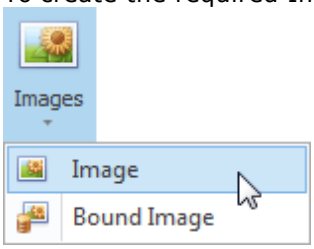
Image Types Overview

The Dashboard Designer allows you to create two types of an Image dashboard item.

The Image dashboard item allows you to add static images to a dashboard.

The **Bound Image** dashboard item can be bound to a set of images (for instance, stored in the database). You can use the Bound Image as a detail item along with the Master Filtering feature.

To create the required Image dashboard item, use the **Images** button in the **Home** ribbon tab.



Providing Images

Providing Static Images

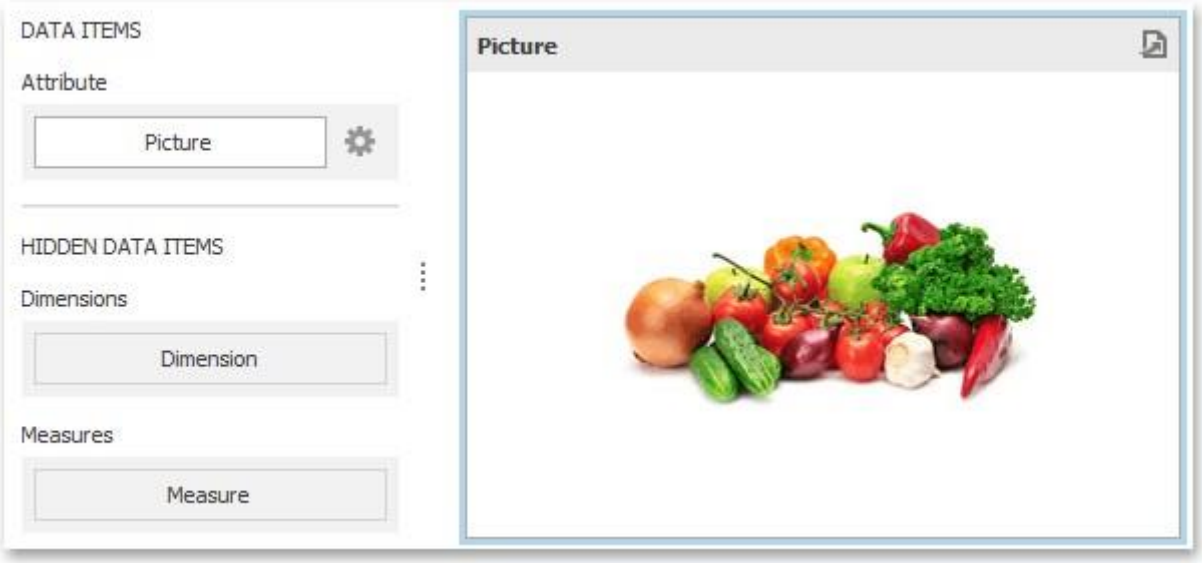
To load an image to a dashboard item, use the Load Image and Import Image buttons in the Ribbon, or commands in the context menu (Load Image... and Import Image..., respectively).

These commands invoke the Open dialog, which allows you to locate the desired image.

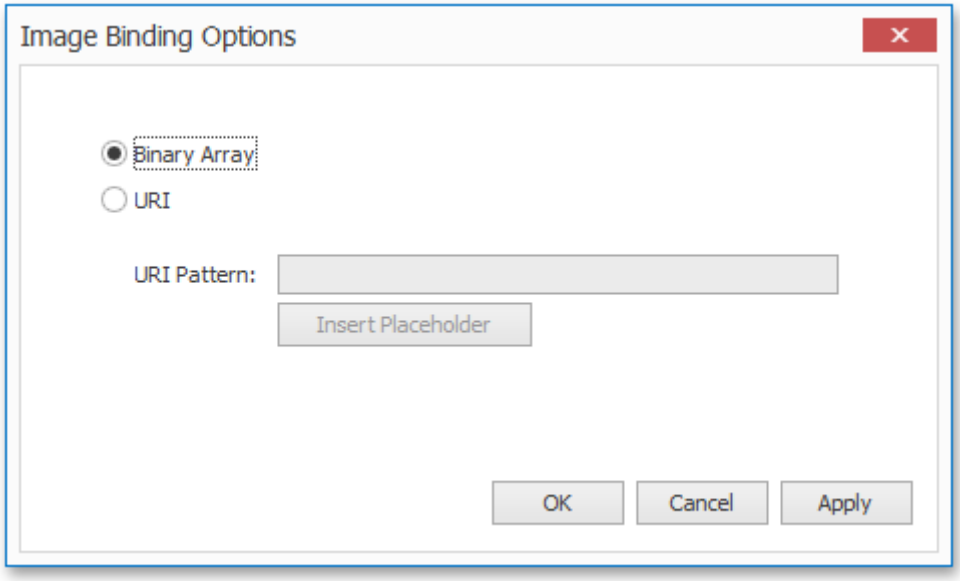
The Load Image command saves the path to the image in the dashboard definition, while the Import Image command saves the image itself.

Binding the Bound Image to Data

The Bound Image dashboard item provides the Attribute data section containing the corresponding placeholder.



Specify the binding mode for the Bound Image by clicking the Options button (the icon) next to the Attribute placeholder. This invokes the following dialog

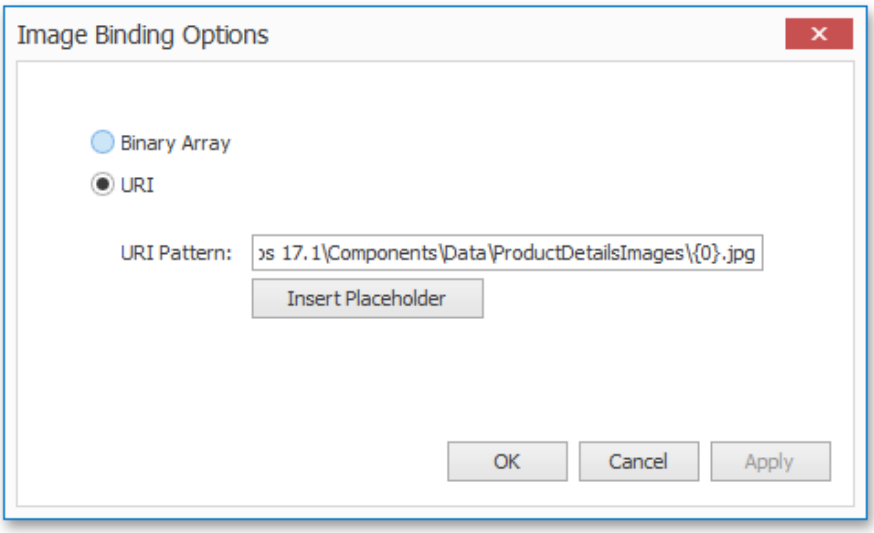


This dialog provides two options.

Binary Array - Use this mode if images are stored in the data source as byte arrays.

URI - Use this mode to locate images accessible by a predefined URI. In this case, the data source field should return strings that are parts of URIs to these images.

For instance, the URI pattern in the form below specifies the path to the folder containing the required images.



Data source field values will be inserted to the position of the {0} placeholder. Thus, the Bound Image maps the current dimension value with the image placed at the specified URI.

Note

Note that the Bound Image can display only a single image simultaneously. If Master Filtering is not applied to the Bound Image, it selects the displayed image in the following ways.

- In the **Binary Array** mode, the displayed image cannot be predicted precisely as a result of sorting limitations for the im age/bin ary data types. Use the Master Filtering feature to display the specified image.
- In the **URI** mode, the Bound Image displays an image corresponding a first attribute value taking into account the attribute's sort order.

Interactivity

This document describes the features that enable interaction between the Bound Image and other dashboard items. These features include Master Filtering.

Master Filtering

The Dashboard allows you to use most of the data-aware dashboard items as a filter for other dashboard items (Master Filter). To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

Data displayed in the Bound Image dashboard item can be filtered by other master filter items. For instance, the

Bound Image below shows an image corresponding to a category selected in the Grid dashboard item.

You can prevent the Bound Image from being affected by other master filter items using the Ignore Master Filters

button on the Data ribbon tab.

Image Settings

You can customize the representation of Image and Bound Image dashboard items in different ways.

Image Alignment

To specify how the image is aligned within the dashboard item, use the Alignment group in the Design ribbon tab.

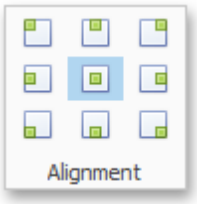
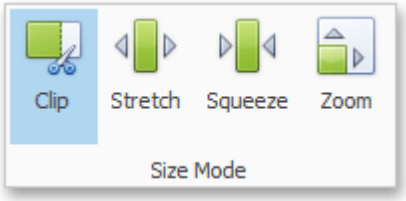


Image Size Mode

You can specify the image size mode that defines how the image fits within the dashboard item. To do this, use the Size Mode group in the Ribbon's Design tab.



The following table illustrates each size mode in two cases: when the image is smaller than the dashboard item, and vice versa.

Size Mode	Image Smaller than Dashboard Item	Image Larger than Dashboard Item	Description
clipped			The image is clipped if it is larger than the Image dashboard item.

Stretch			The image is stretched or shrunk to fit the size of the **Imag e** dashboard item.
Squeeze			If the dim en sio ns of the **Imag e** dashboard item exceed those of the image it contains, the image is shown in full - size. Other wise, the ima ge is resized to fit the dimensions of the **Image** dashboard item.

Zoom			The image is sized proportionally (without clipping), so that it best fits the Image dashboard item. If the aspect ratio of the Image dashboard item is the same as the aspect ratio of the image, it will be resized to fit into the Image dashboard item while maintaining its aspect ratio. Otherwise, the image will be resized in the closest fitting dimension (either the height or the width), and the remaining dimension will be resized while maintaining the image' s aspect ratio.

Text Box

Use the Text Box dashboard item to display rich text within a dashboard.

You can either add a static text or you can use the Text Box as a detail item along with the Master Filtering or Filtering features.

- Editing Text
- Providing
- Data Interactivity

Editing Text

To edit the text within the Text Box, click the Edit button in the ribbon's Design tab or use the corresponding item in the context menu.

This adds the **Text Box Editor** context category to the Dashboard Designer's ribbon and allows you to modify the content within the Text Box.

To learn how to edit the content within the Text Box, see Rich Text Editor. After you change the document, click **Edit** again to finish editing.

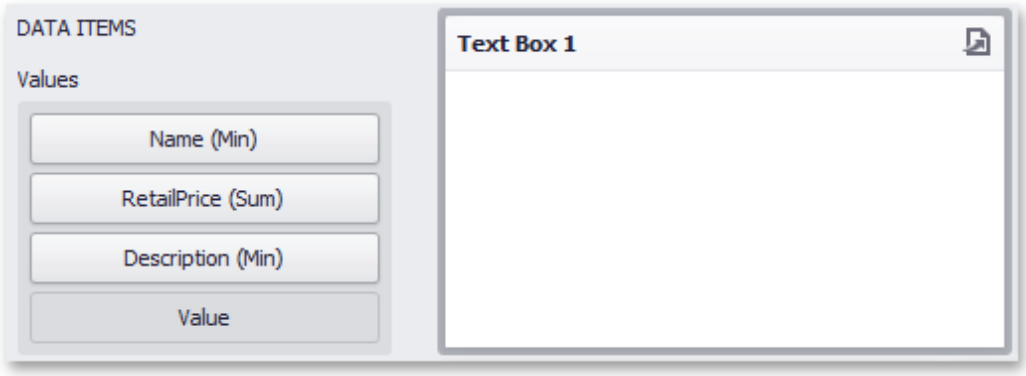
Note

Note that the Text Box can be bound to data. To learn how to do this, see Providing Data.

Providing Data

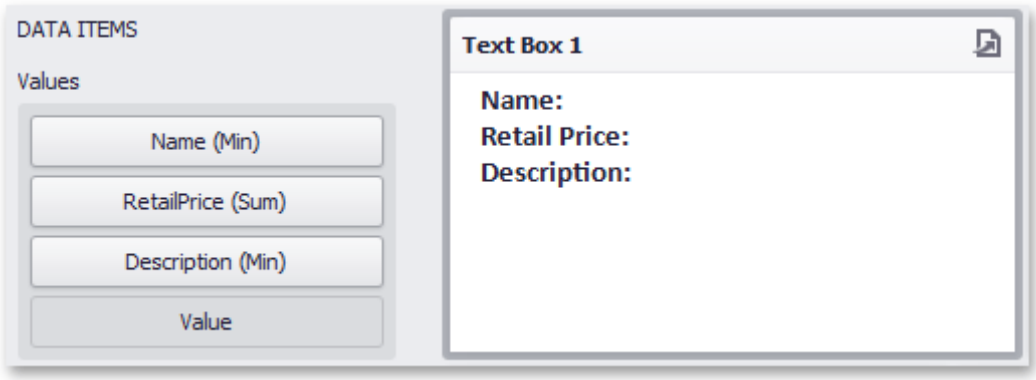
The Text Box dashboard item can be bound to data as other data-aware dashboard items. To do this, perform the following steps.

1. Drop the Name, RetailPrice and Description data source fields from the Products table to the **Values** section of the Text Box.

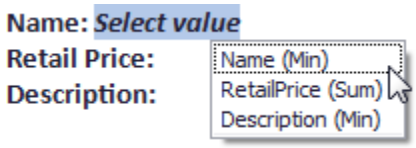


Note that summary types of the created measures are **Min**, **Sum** and **Min**, respectively.

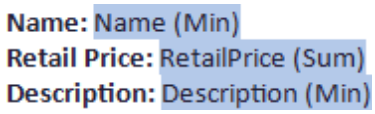
2. Click the Edit button in the **Design** ribbon tab and add the Name, Retail Price and Description strings to the document.



3. Place the pointer next to Name, right-click the document and select **Insert Field** (or use the Insert Field button in the ribbon). Then, click the Select value placeholder and select the Name (Min) measure.



4. Perform the third step for Retail Price and Description.



5. Click the Edit button again to leave the editing mode. The Text Box will show data in the following way

You can use this Text Box as a detail item along with the Master Filtering feature to filter data according to the selected product.

Interactivity

This document describes the features that enable interaction between the Text Box and other dashboard items. These features include Master Filtering.

Master Filtering

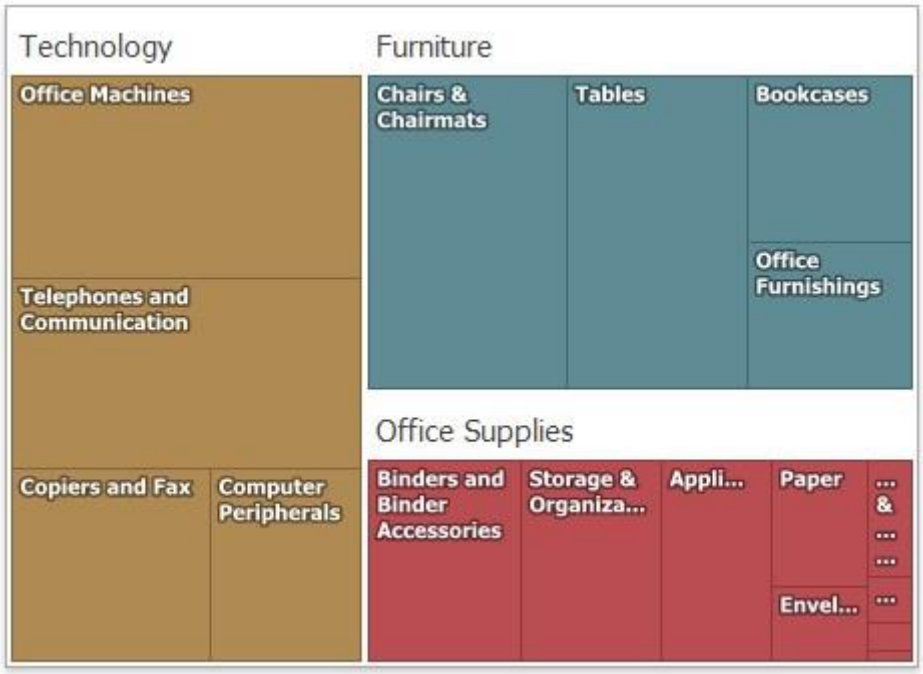
The Dashboard allows you to use most of the data-aware dashboard items as a filter for other dashboard items (Master Filter). To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

Data displayed in the Text Box dashboard item can be filtered by other master filter items. For instance, the Text Box below shows data corresponding to a product selected in the List Box dashboard item.

You can prevent the Text Box from being affected by other master filter items using the Ignore Master Filters button on the Data ribbon tab.

Treemap

Use the Treemap dashboard item to visualize data in nested rectangles that are called tiles.



This section is divided into the following subsections.

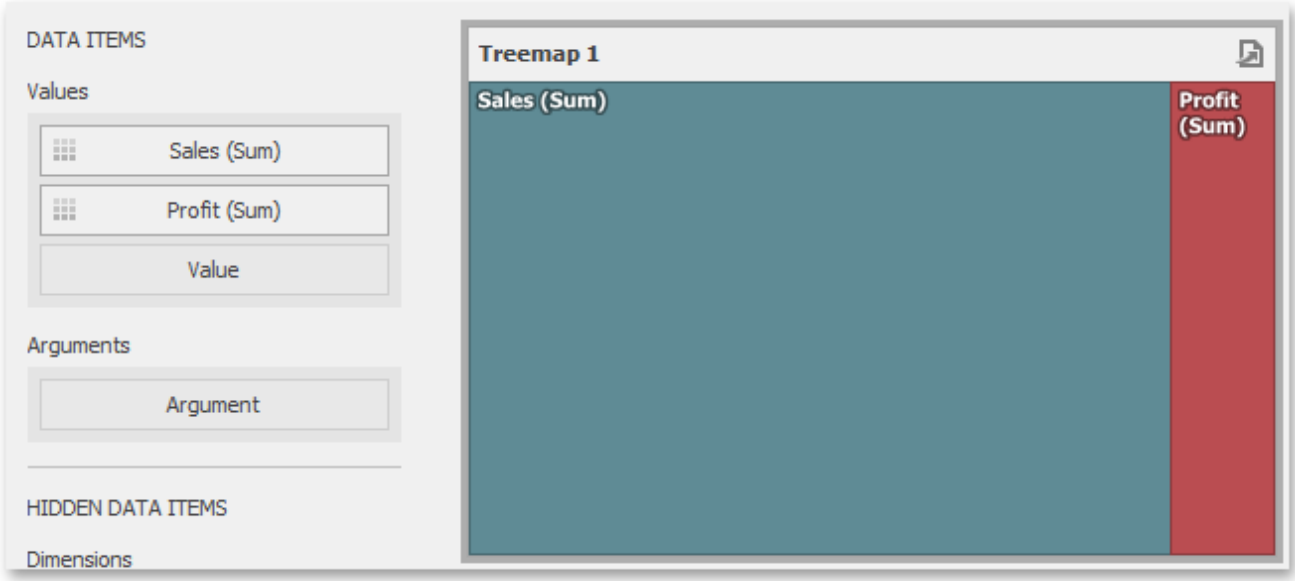
- Providin
- g Data
- Interacti
- vity
- Layout
- Grouping
  Coloring
  Labels

Providing Data

The Dashboard Designer allows you to bind various dashboard items to data in a virtually uniform manner. To learn more, see the Binding Dashboard Items to Data topic. The only difference is in the data sections that the required dashboard item has.

The Treemap dashboard item has the Values and Arguments data sections that provide numeric and discrete categorical data, respectively. The steps below provide the most common scenarios of binding a Treemap to data.

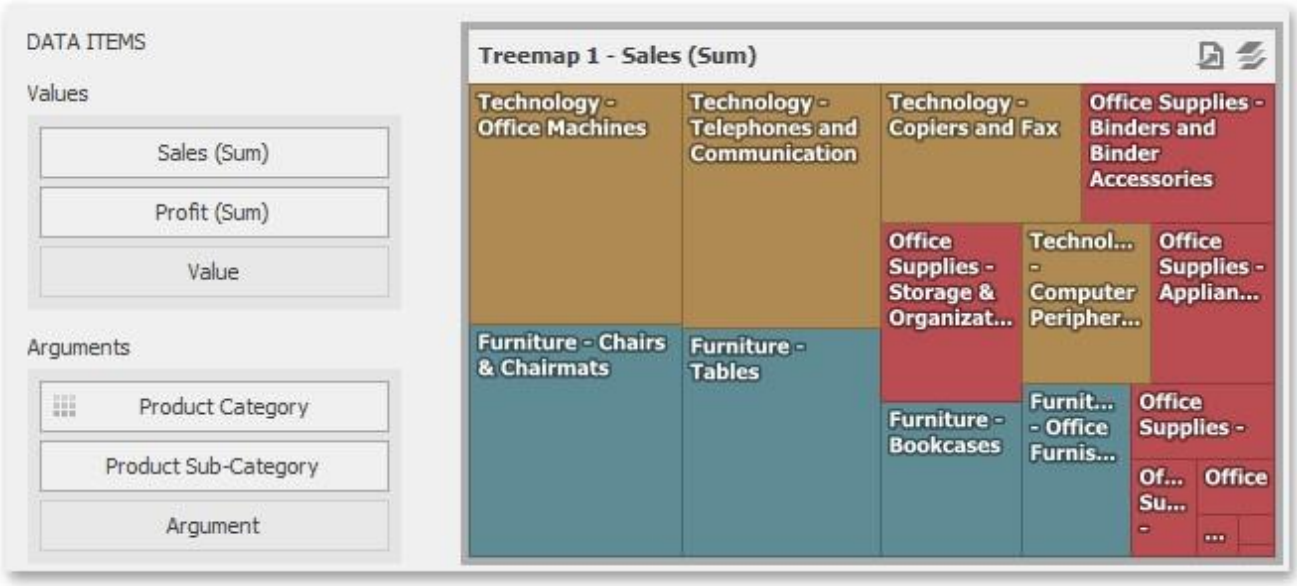
1.Drop the Sales and Profit fields to the **Values** section.



The Treemap will draw two tiles whose sizes correspond to the Sales and Profit summary values. 2.Drop the Produ ct Category field to **Arguments**.

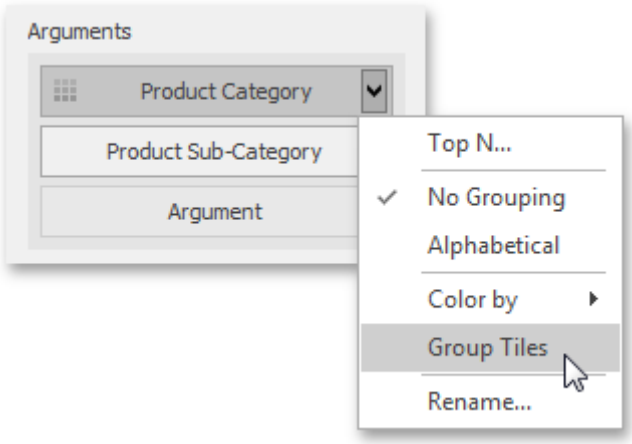
Treemap will create individual tiles for all categories. You can switch between Sales and Profit values by clicking the icon in the item's caption or you can use its context menu.

3. Drop the child Product Sub-Category field into **Arguments**.

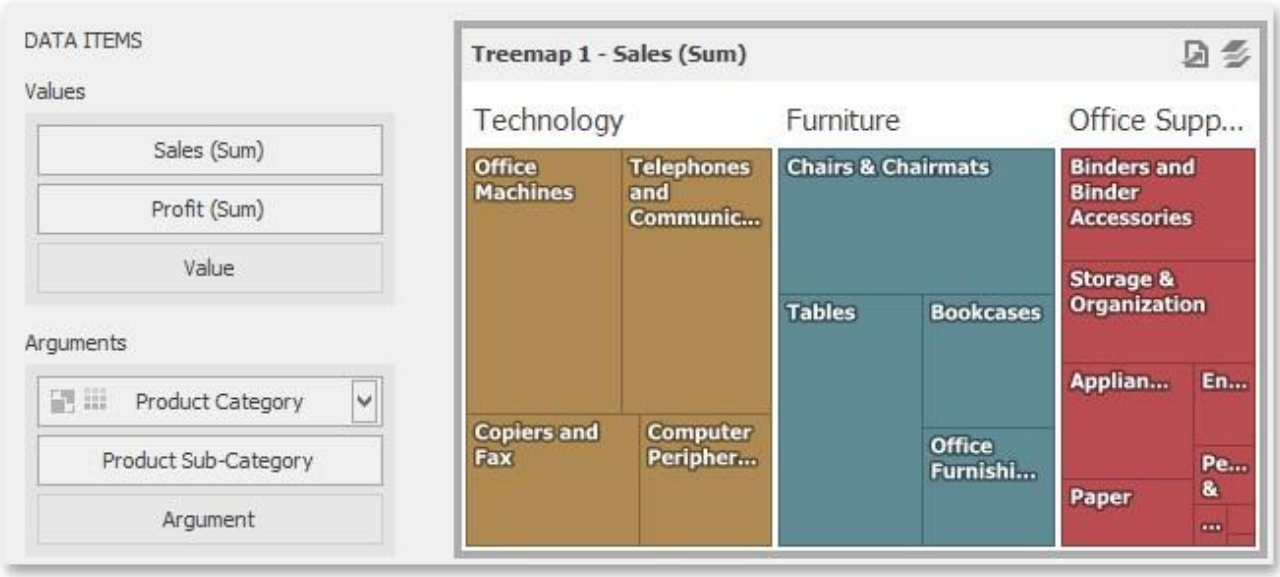


The Treemap will visualize all combinations of categories and corresponding sub-categories using individual tiles.

If the Arguments section contains several dimensions, you can group child tiles by values of the parent dimension. To group sub-categories inside corresponding categories, click the CategoryN am e menu button and select Group Tiles.



Sub-category tiles will be grouped into category groups.


DATA ITEMS
Values
Sales (Sum)
Profit (Sum)
Value
Arguments
Product Category
Product Sub-Category
Argument
Treemap 1 - Sales (Sum)
Technology
Furniture
Office Supp...
Office Machines
Telephones and Communic...
Copiers and Fax
Computer Peripher...
Chairs & Chairmats
Tables
Bookcases
Office Furnishi...
Binders and Binder Accessories
Storage & Organization
Applian...
En...
Pe... &
Paper
...

Interactivity

This section describes features that enable interaction between the Treemap dashboard item and other items. These features include Master Filtering and Drill-Down.

The section contains the following topics.

- Master Filtering
- Drill-Down

Master Filtering

The Dashboard Designer allows you to use any data aware dashboard item as a filter for other dashboard items. To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

The Treemap dashboard item supports filtering by tiles/groups. When Master Filtering is enabled, you can click a tile or group caption (or multiple tiles/groups by holding down the CTRL key) to make other dashboard items only display data related to the selected tile/group(s).

Category	Sub-Category	Sales
Furniture	Bookcases	507K
	Chairs & Chairmats	1.16M
	Tables	1.06M
Technology	Computer Peripherals	491K
	Copiers and Fax	661K
	Office Machines	1.22M
	Telephones and Communication	1.14M

Note

If the Single Master Filter is used, you can select only tiles corresponding to the bottommost level.

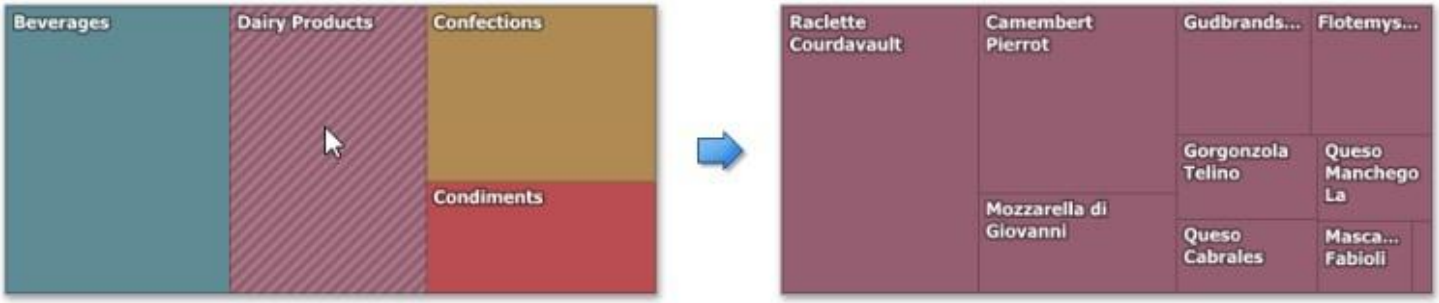
Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more about drill-down concepts common to all dashboard items, see the Drill-Down topic.

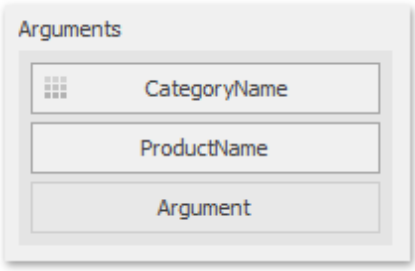
When drill-down is enabled, you can click a tile to view its details.

Note

When Master Filtering is enabled, you can view the details by double-clicking a tile.



Drill-down requires that the **Arguments** section contains several dimensions, from the least detailed to the most detailed dimension.



To enable drill-down, click the **Drill Down** button in the **Data** Ribbon tab (or the button if you are using the toolbar menu).

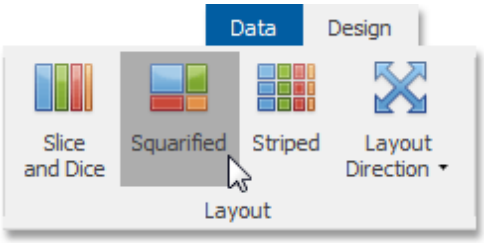
To return to the previous detail level (drill up), use the **Drill Up** ( ) button in the caption of the Treemap dashboard item, or the **Drill Up** command in the context menu.

Note

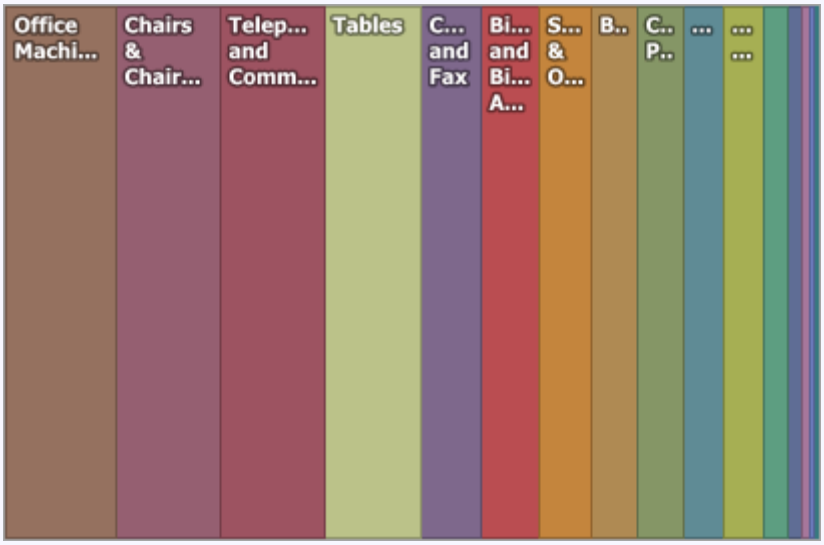
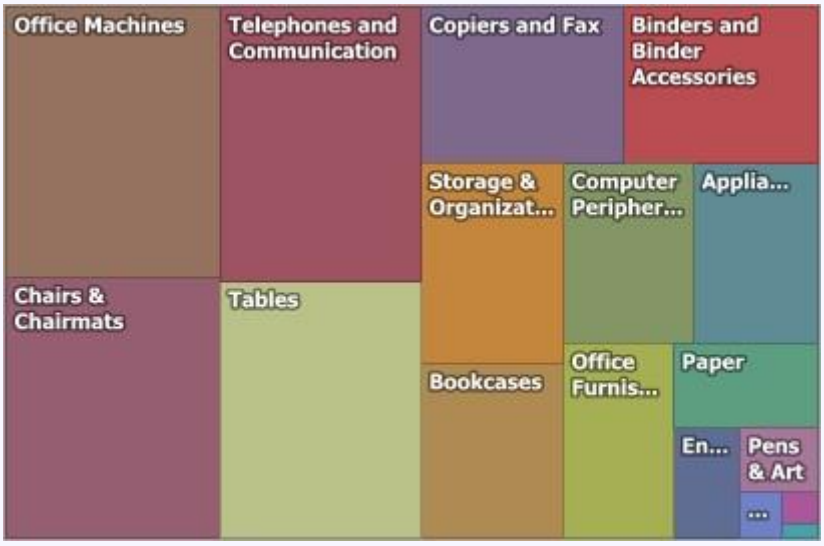
Grouping is not in effect when the drill-down is enabled.

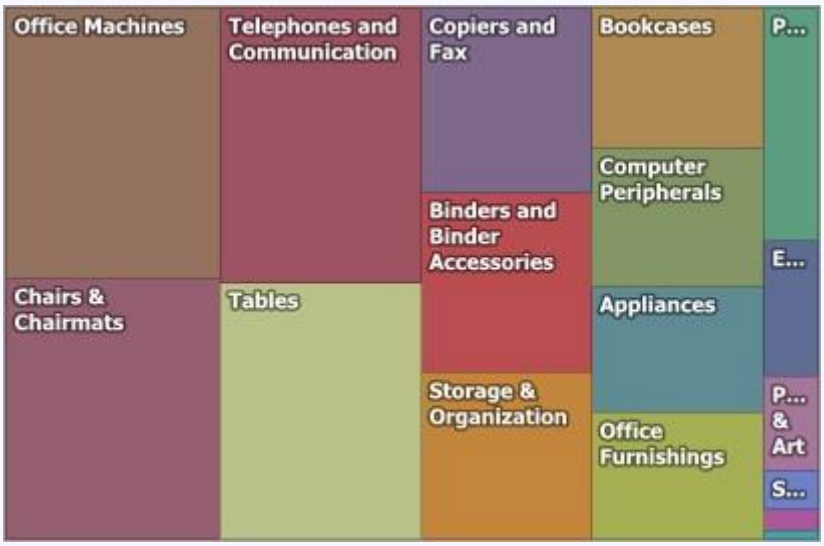
Layout

This topic describes how to change a layout algorithm used to arrange Treemap tiles. To do this in the Designer, use buttons from the Layout group placed in the Design ribbon tab.

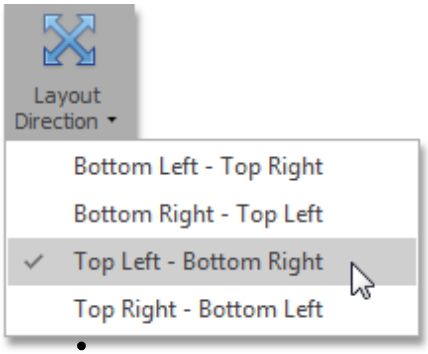


The following algorithms are available.

Algorithm	Example	Description
Slice and Dice		This layout algorithm divides the space between items, slicing it in the specified direction depending on item value.
Squarified		The Squarified algorithm arranges tiles so that their width/height ratio will be closer to 1.

Striped		This algorithm is a modified version of the Squarified algorithm. The difference here is that tiles are drawn side by side as columns or rows.

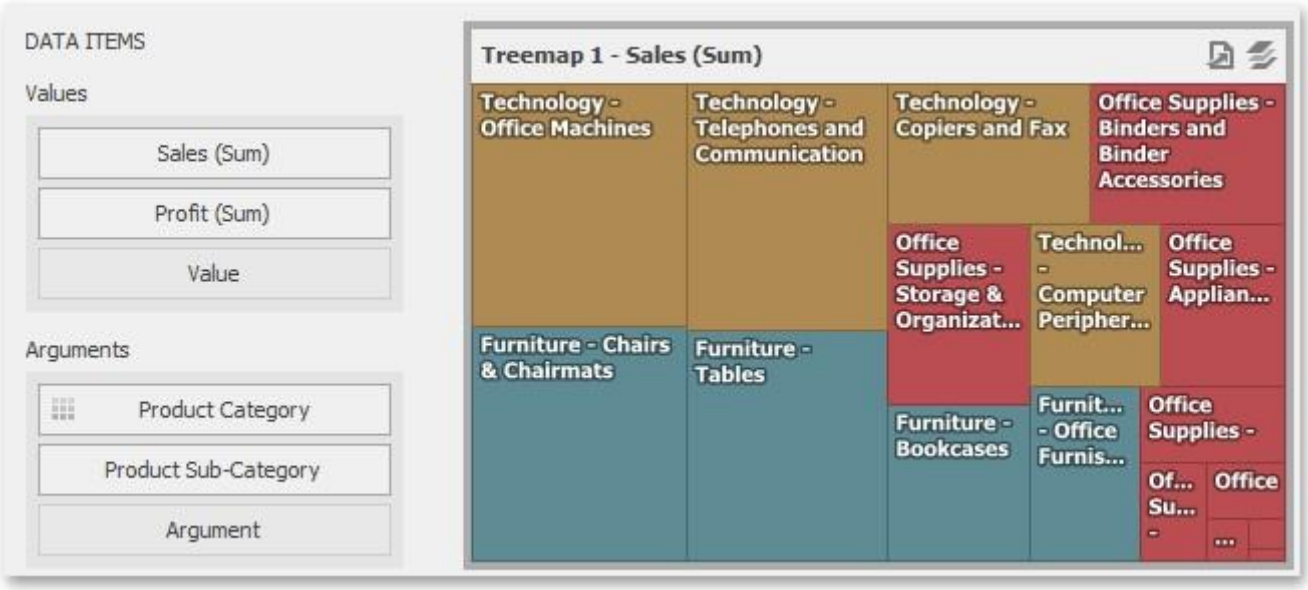
You can also set a layout direction to specify an arrangement of tiles depending on their sizes. To do this, click the Layout Direction button and select the required direction.



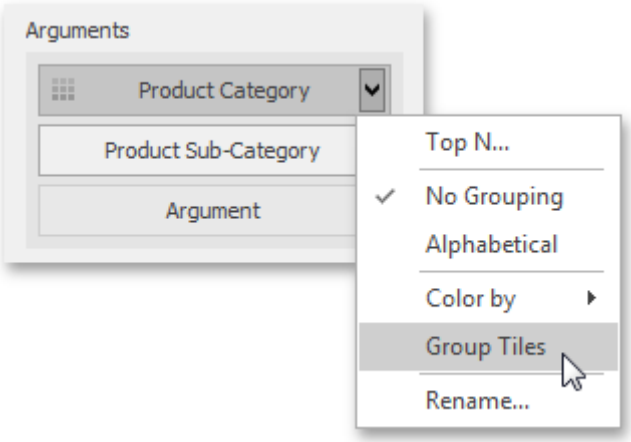
- **Bottom Left - Top Right** - Arrange tiles from the bottom-left to the top-right corner. **Bottom Right - Top Left** - Arrange tiles from the bottom-right to the top-left corner. **Top Left - Bottom Right** - Arrange tiles from the top-left to the bottom-right corner. **Top Right - Bottom Left** - Arrange tiles from the top-right to the bottom-left corner.

Grouping

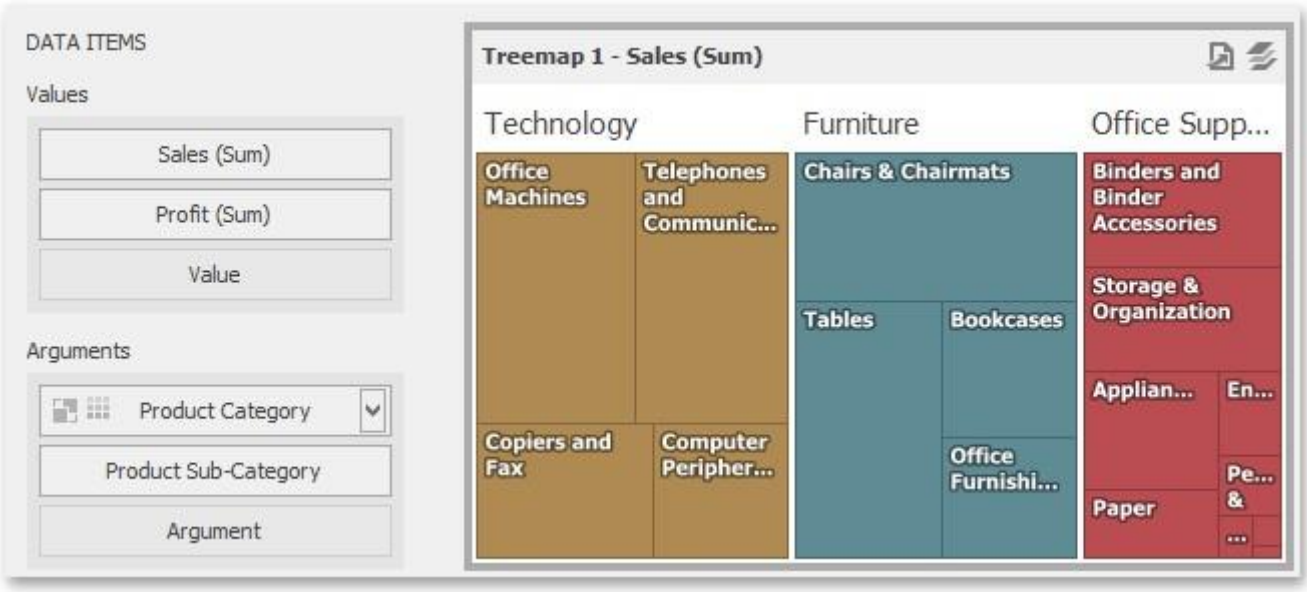
If you use several arguments in the Treemap, you can group tiles corresponding to child values by parent values. For instance, the following Treemap dashboard item displays combinations of categories and sub-categories.



To group sub-categories inside corresponding categories, click the Product Category menu button and select **Group Tiles**.



Product tiles will be grouped into category groups.



Note that the icon will be displayed within the Produ ct Category dimension.

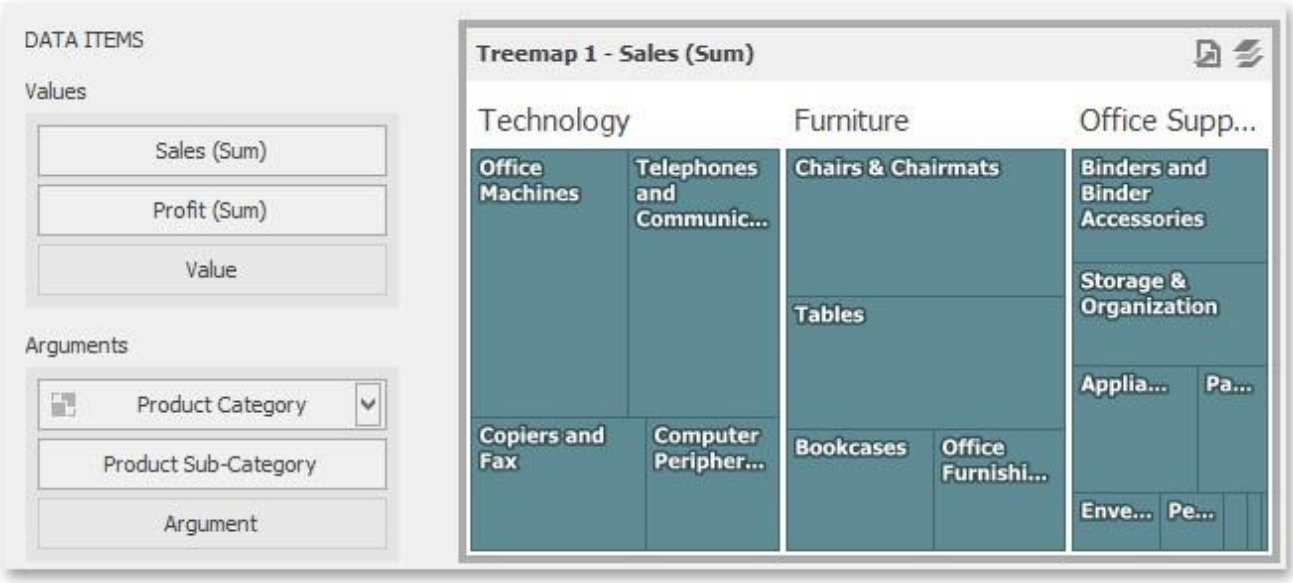
Coloring

Certain dashboard items provide the capability to color dashboard item elements by associating dimension values/ measures and specified colors. You can choose whether to use a global color scheme to provide consistent colors for identical values or specify a local color scheme for each dashboard item. To learn more about coloring concepts common for all dashboard items, see the Coloring section.

By default, the Treemap dashboard item colors its tiles in the following way.

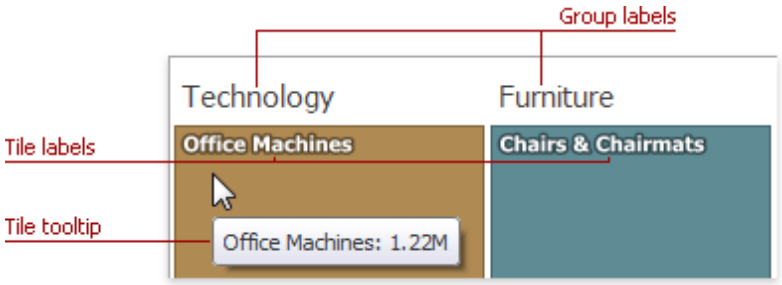
- If the Treemap dashboard item contains only measures (the **Values** section), values corresponding to different measures are colored by hue.
- If the Treemap dashboard item contains arguments (the **Arguments** section), values corresponding to the first argument are colored by hue.

If necessary, you can change the default behavior. For instance, the image below shows the Treemap dashboard item whose measures and argument values are painted with the same color.

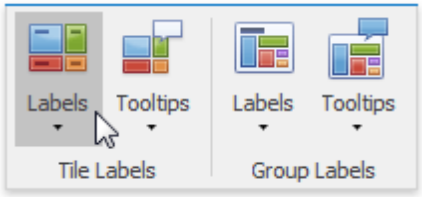


Labels

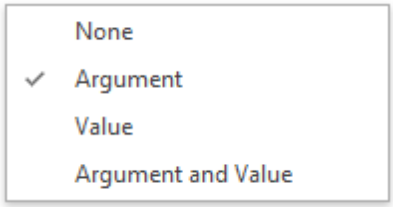
The Treemap displays labels that contain descriptions for tiles and groups, and provide tooltips with additional information.



You can specify which information should be displayed within tile and group labels separately. To do this, use the **Labels** and **Tooltips** buttons in the **Design** Ribbon tab.



Use buttons within the **Tile Labels**/**Group Labels** ribbon groups to manage tile and group labels, respectively. These buttons invoke the drop-down menu, which is similar for all buttons.



Filter Elements

Filter elements represent a special type of dashboard item that allows you to apply filtering to other dashboard items.

Topics in this section.

- Filter Elements
- Overview Providing
- Data Interactivity

Filter Elements Overview

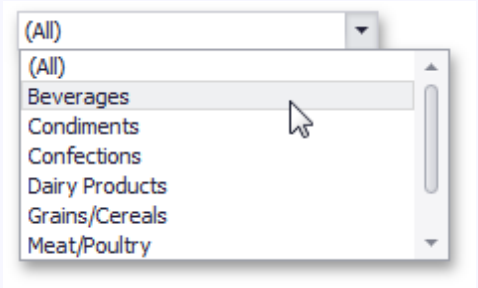
The Dashboard Designer allows you to create three types of filter elements that provide the capability to filter other dashboard items.

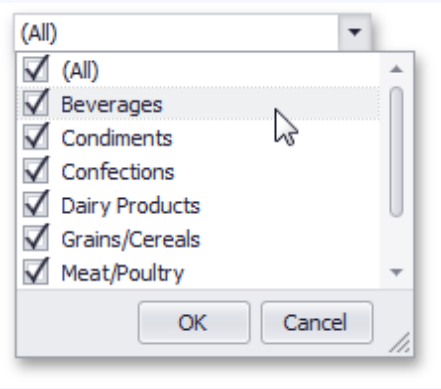
- Combo Box
- List Box
- Tree View

To add the required filter element to the dashboard, use the **Filter Elements** button in the **Home** ribbon tab.

Combo Box

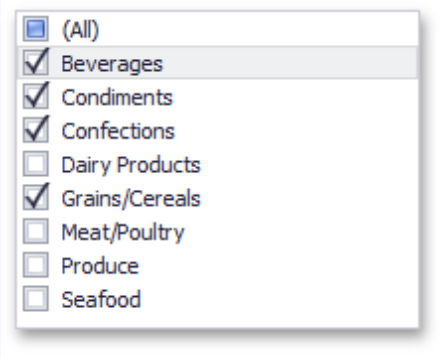
The **Combo Box** dashboard item allows you to select a value(s) from the drop-down list. You can switch the combo box type in the ribbon **Design** tab.

Combo Box Type	Example	Description
Standard		Allows yous to select only a single value.

Checked		Allows you to select multiple values in the invoked drop-down list.

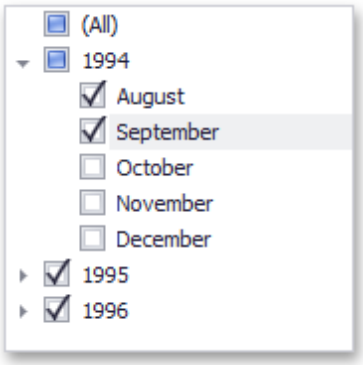
List Box

The **List Box** dashboard item allows you to select a value(s) from the list. You can switch the list box type in the ribbon **Design** tab.

List Box Type	Example	Description
Checked		Allows you to select multiple values in the list box.
Radio		Allows you to select only a single value in the radio group.

Tree View

The **Tree View** dashboard item displays values in a hierarchical way and allows you to expand/collapse nodes.



You can manage the initial expanded state of filter values using the **Auto Expand** button in the **Design** ribbon tab.

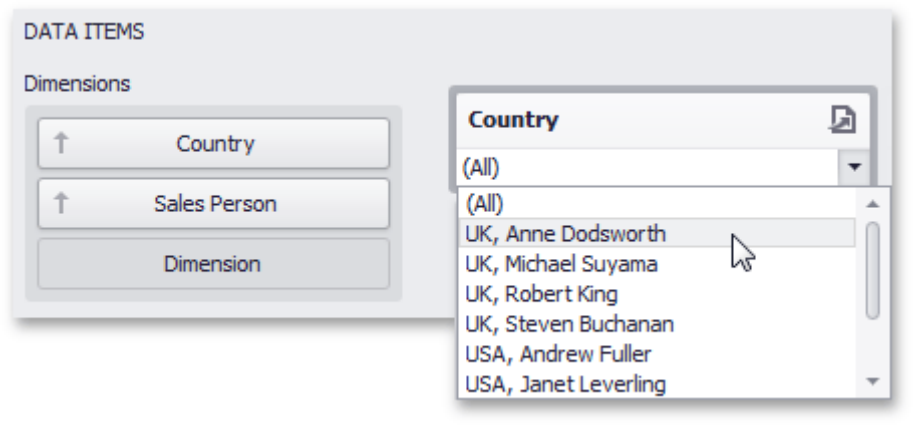
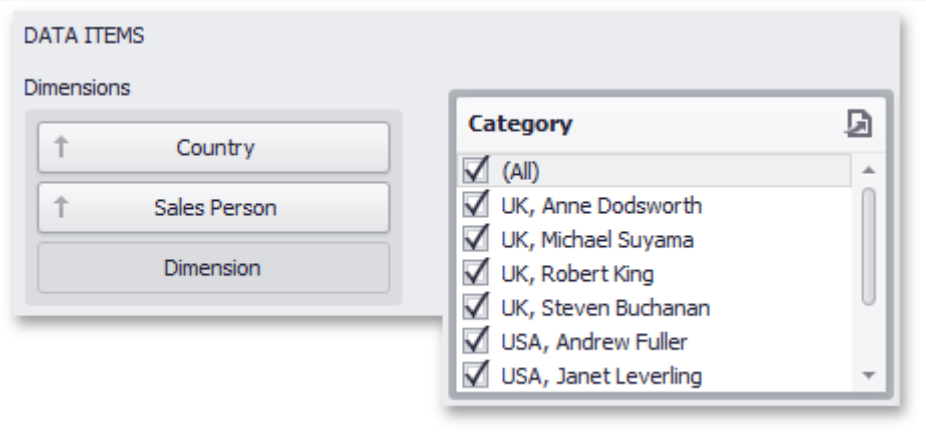
Providing Data

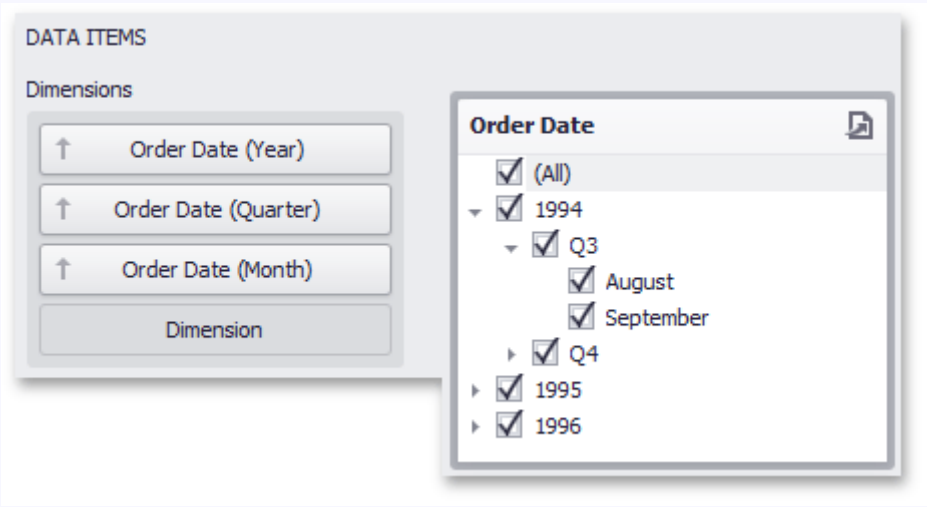
This topic describes how to bind filter elements to data using the Dashboard Designer.

The Dashboard Designer allows you to bind various dashboard items to data in a consistent manner (see Binding Dashboard Items to Data for details), the only difference being the data sections that these dashboard items comprise.

Binding Overview

All filter elements provide the **Dimensions** data section, which accepts dimensions used to provide filter values. To learn about the specifics of binding various filter elements to data, see the table below.

Dashboard Item	Data Sections	Description
Combo Box		The Combo Box filter element can contain several dimensions at the **Dimensions** data section. In this case, the drop-down list will contain combinations of dimension values.
List Box		The List Box filter element can contain several dimensions at the **Dimensions** data section. In this case, the list will contain combinations of dimension values.

Tree View		The Tree View filter element allows you to display dimension values in a hierarchical way. This can be the set of dimensions with different group intervals (for instance, Year/ Quarter/ Month) or the set of related dimensions (for instance, geographical data such as continents/ countries/ cities).

Interactivity

This document describes the filtering capabilities supported by filter elements. You can use filter elements to apply master filtering to other dashboard items or introduce hierarchical filtering by adding several connected filters.

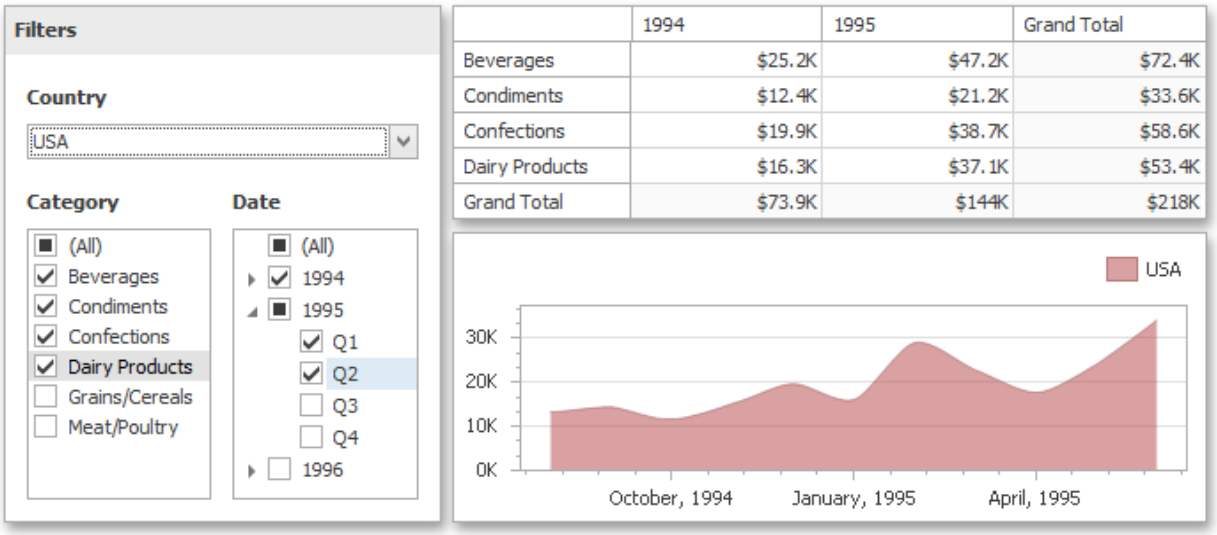
Master Filtering

The **Dashboard** allows you to use any data aware dashboard item as a filter for other dashboard items (**Master Filter**). To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

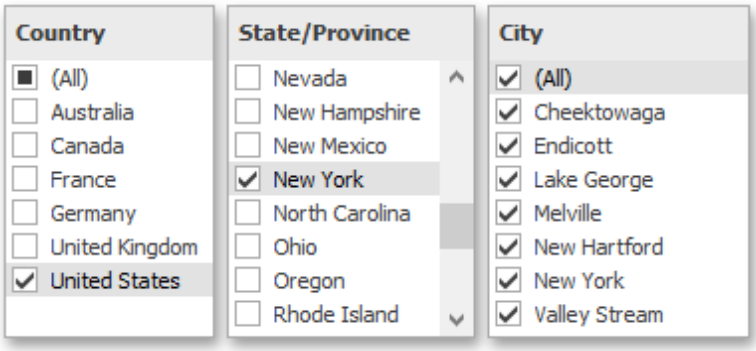
Important

Note that filter elements do not support Master Filter selection modes. You can switch the selection mode by changing the type of the required filter element.

Depending on the filter element type, you can select a value(s) to make other dashboard items display only data related to the selected value(s).



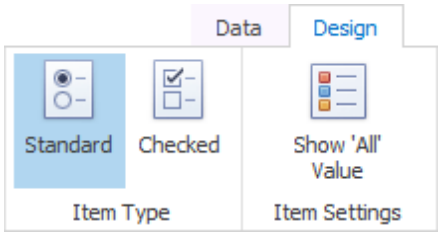
You can also create a set of related filter elements containing relevant filter values. For instance, in the image below, the State/Province filter element contains states related to the 'United States' value, while the City filter element contains cities related to the 'New York' value.



Disable the **Ignore Master Filters** option for the required filter element to allow applying filtering to this element.

Filter Element Options

Filter elements provide the capability to specify whether to enable the (All) option that allows you to apply filtering by all values. To do this, use the Show 'All' Value button in the Design ribbon tab.



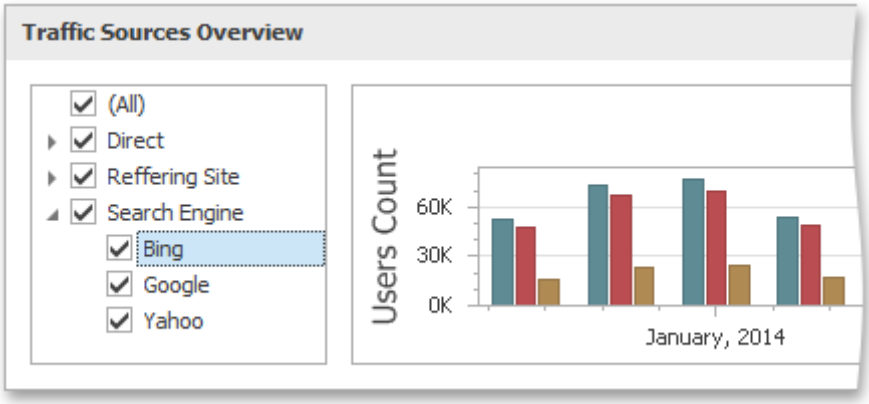
Note that this capability is supported by the 'Standard' Combo Box and 'Radio' List Box filter elements.

Dashboard Item Group

The BI Dashboard provides the capability to combine dashboard items into a group. The dashboard item group serves two main purposes.

- Combine dashboard items within the dashboard into a separate layout group.
- Manage interaction between dashboard items within and outside the group.

For instance, you can combine related filter elements and data visualization dashboard items into a group.



- Create a Group
- Interactivity

Create a Group

To create a new group, use the **Group** button in the **Home** ribbon tab.

You can add dashboard items to a group and manage item layout using drag-and-drop. To learn how to manage a group's caption, see the Dashboard Item Caption topic.

Note

Note that a dashboard item group cannot be added to another group.

Interactivity

The dashboard item group provides the capability to manage interaction between dashboard items within and outside the group.

The Master Filter button allows you to specify whether the current group allows you to filter external dashboard items using master filter items contained within the group. If this option is disabled, master filter items contained within the group can filter only dashboard items from this group.

The Ignore Master Filters button allows you to isolate dashboard items contained within the group from being filtered using external master filter items.

Data Shaping

This section describes how to perform various data shaping operations (such as grouping, sorting and filtering) in the Dashboard Designer.

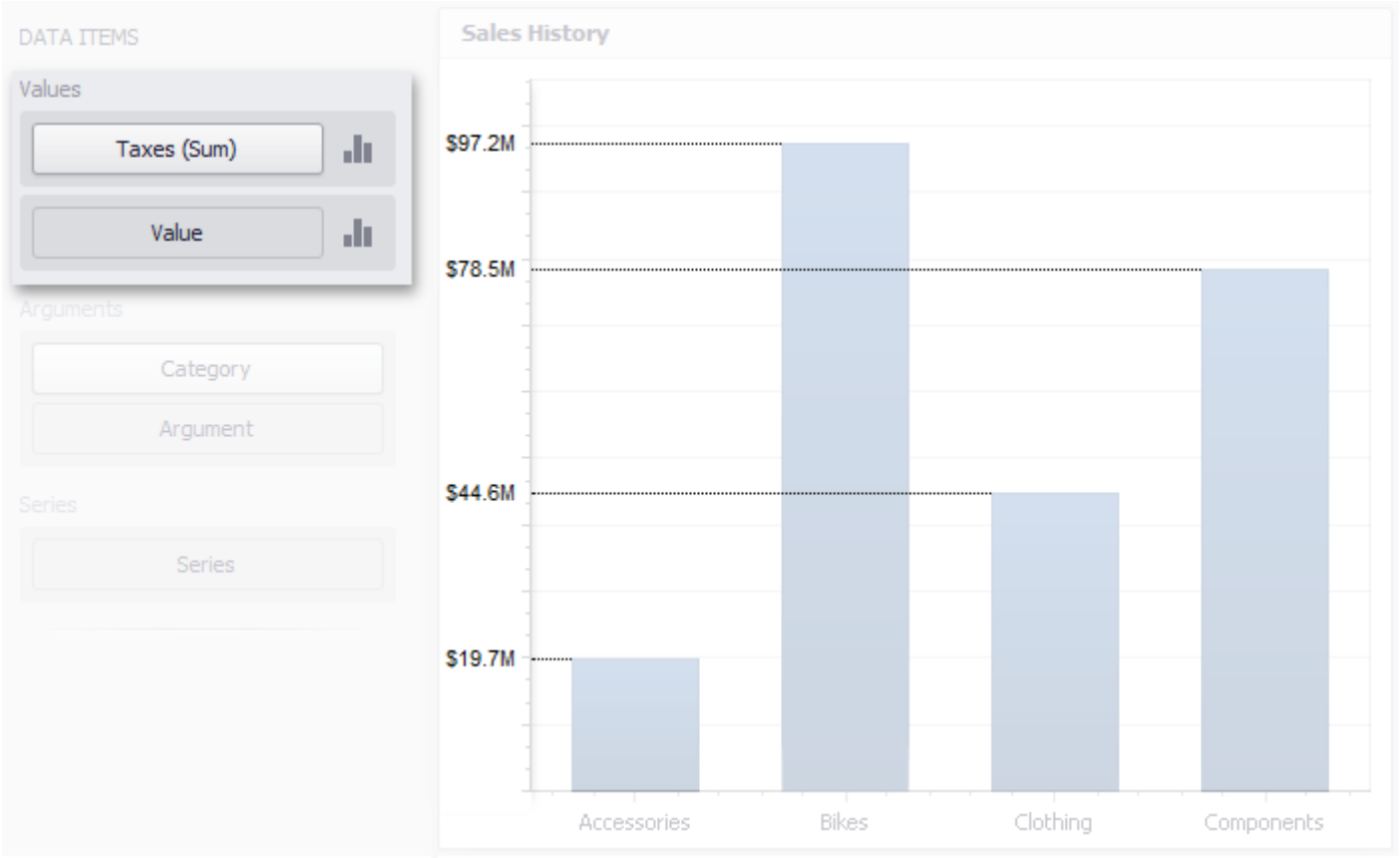
The section contains the following topics.

Summarization

- Grouping
- Sortin g
- Filterin g
- Top N
- Formatting Data

Summarization

To obtain numeric values that should be displayed within a dashboard item, Dashboard calculates a summary function against the specified measure.



This topic describes how to specify which summary function should be calculated against a particular measure. The following sections are available.

- Summary Function Types Changing Summary Type

Summary Function Types

The following summary functions are available.

- **Count** - The number of values (excluding **Null** and **DBNull** values).

  This is the only summary type that can be calculated against non-numeric data.

- **Count Distinct** - The number of distinct values.
- **Sum** - The sum of the values.

$$Sum = \sum_{i} v_i$$

- **Min** - The smallest value.
- **Max** - The largest value.

- **Average** - The average of the values.

$$\bar{v} = \frac{1}{n} \cdot \sum_i v_i$$

$$StdDev = \sqrt{\frac{1}{n-1} \cdot \sum_i (v_i - \bar{v})^2}$$

- **StdDev** - An estimate of the standard deviation of a population, where the sample is a subset of the entire population.

  StdDevP - The standard deviation of a population, where the population is the entire data to be summarized.

$$Stddevp = \sqrt{\frac{1}{n} \cdot \sum_i (v_i - \bar{v})^2}$$

- **Var** - An estimate of the variance of a population, where the sample is a subset of the entire population.

$$Var = \frac{1}{n-1} \cdot \sum_i (v_i - \bar{v})^2$$

- **VarP** - The variance of a population, where the population is the entire data to be summarized.

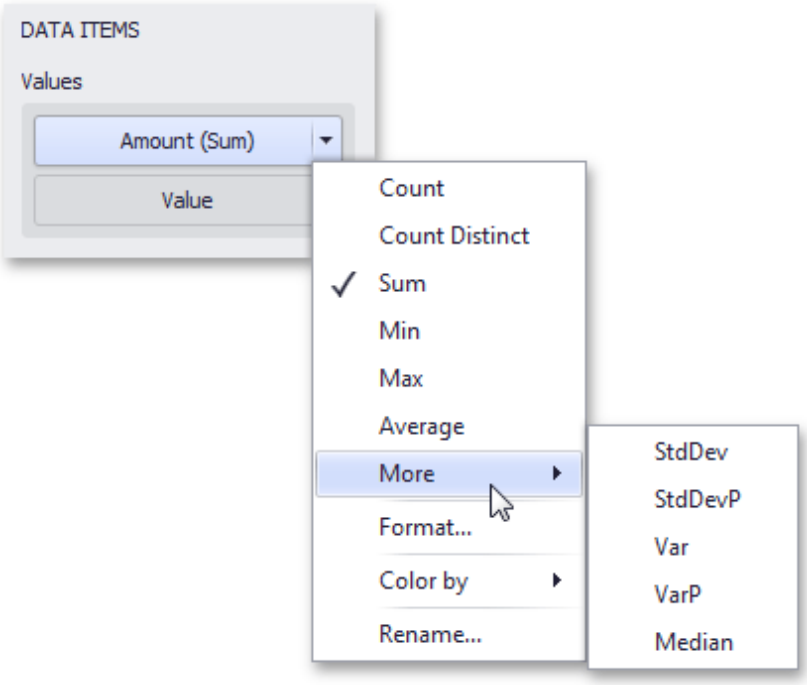
$$Varp = \frac{1}{n} \cdot \sum_i (v_i - \bar{v})^2$$

- **Median** - The m edian of the values (excluding **Null** and **DBNull** values). A m edian is the number separating the higher half of a value range from the lower half.

Changing Summary Type

By default, Dashboard calculates Sum for numeric measures and Count for measures that contain another type of data.

You can change the summary function type for numeric measures. To do this in the Designer, invoke the data item menu and select the desired summary type. Less common summary types are organized in the More submenu.



Grouping

The Dashboard Designer allows you to group dimension values and display summaries for entire groups rather than individual values.

You can arrange dimension values in groups of different sizes by specifying the appropriate group interval. For instance, date-time values can be grouped by years, months, quarters, etc.

This topic lists the supported text and date-time group intervals, and describes how to change the group interval. The following sections are available.

- Text Group Intervals
- Date-Time Group Intervals
- Changing Group Interval

Text Group Intervals

String values support the following grouping intervals.

No Grouping	Each value is displayed "as is".
Alphabetical	Values are grouped alphabetically (e.g., A, B, C, ... Z).

Date-Time Group Intervals

Date-time values support the following group intervals.

Note

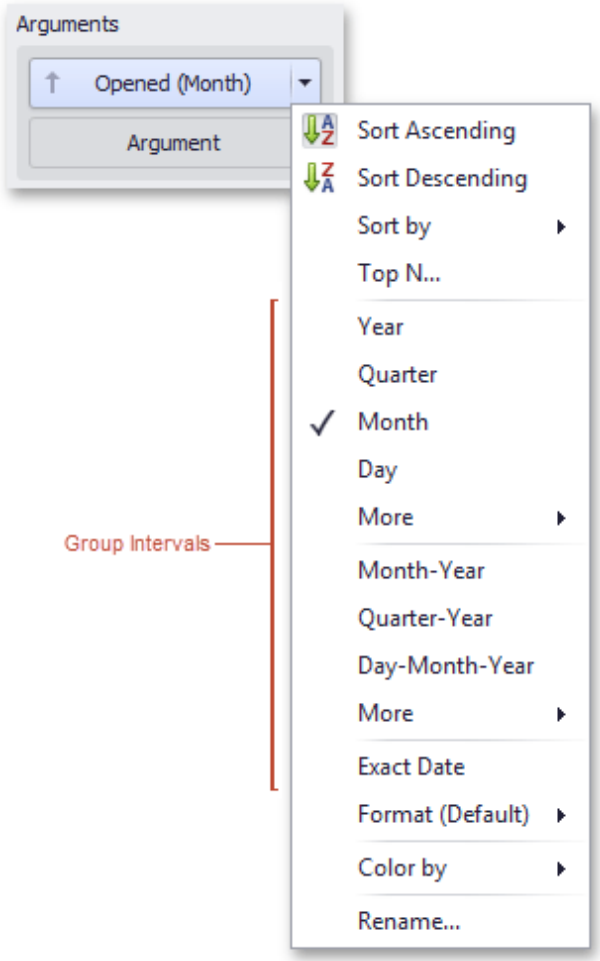
Examples in the table below are formatted using the default settings. To learn how to customize format settings, see Formatting Data.

Group interval	Description	Examples
Year	Values are grouped by the year.	2010, 2011, 2012
Quarter	Values are grouped by the quarter.	Q1, Q2, Q3, Q4
Month	Values are grouped by the month.	January, February, March, ... December
Day	Values are grouped by the day of the month.	1, 2, 3, ... 31
Hour	Values are grouped by the hour.	0, 1, 2, ... 23
Minute	Values are grouped by the minute.	0, 1, 2, ... 59
Second	Values are grouped by the second.	0, 1, 2, ... 59
Day of the Year	Values are grouped by the day of the year.	1, 2, 3, ... 365
Day of the Week	Values are grouped by the day of the week.	Sunday, Monday, Tuesday, ... Saturday
Week of the Year	Values are grouped by the week of the year.	1, 2, 3, ... 52
Week of the Month	Values are grouped by the week of the month.	1, 2, 3, 4, 5

Month-Year	Values are grouped by the year and month.	January 2012, February 2012, ... December 2012, January 2013, ...
Quarter-Year	Values are grouped by the year and quarter.	Q3 2012, Q4 2012, Q1 2013, Q2 2013, ...
Day-Month-Year	Values are grouped by date.	3/4/2012, 3/5/2012, 3/6/2012, ...
Date-Hour	Values are grouped by date with the hour value.	3/4/2012 0:00 AM, 3/4/2012 1:00 AM, 3/4/2012 2:00 AM, ...
Date-Hour-Minute	Values are grouped by date with the hour and minute values.	3/4/2012 0:00 AM, 3/4/2012 0:01 AM, 3/4/2012 0:02 AM, ...
Date-Hour-Minute-Second	Values are grouped by date with the hour, minute and second values.	3/4/2012 0:00:00 AM, 3/4/2012 0:00:01 AM, 3/4/2012 0:00:02 AM, ...
Exact Date	Each value is displayed "as is".	2009, Q2 2009, 6/15/2009 1:45:30 PM, ...

Changing Group Interval

To specify the group interval in the Designer, invoke the data item menu and select the desired group interval. Less common group intervals are organized in the **More** submenus.



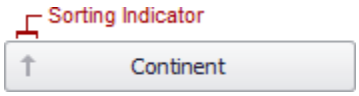
Sorting

The Dashboard Designer allows you to easily change the sort order of values within a dashboard item. You can also enable sorting by parameter values.

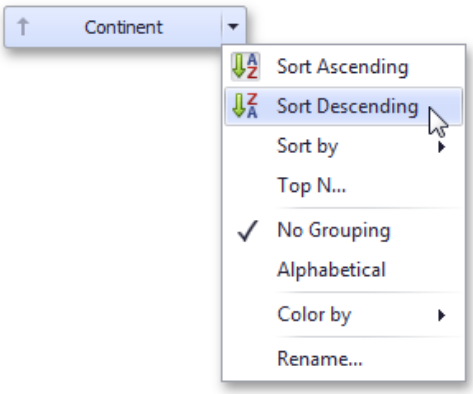
- Changing Sort Order
- Sorting by Measure
- Specifics

Changing Sort Order

The sort order of dimension values is indicated with an arrow.

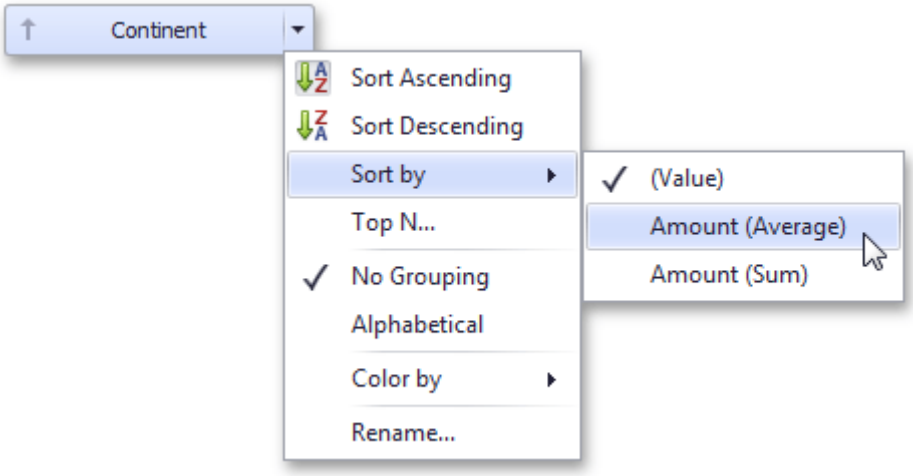


To change the sort order in the Designer, click the data item. You can also toggle sorting from the data item menu.



Sorting by Measure Values

Dashboard allows you to sort dimension values by summary values calculated for a specific measure. To enable sorting by measure in the Designer, use the Sort by submenu in the dimension's menu.



You can also sort dimension values by the values of hidden measures.

Filtering

The Dashboard allows you to filter a query of the SQL Data Source or apply filtering to a specific data-aware dashboard item.

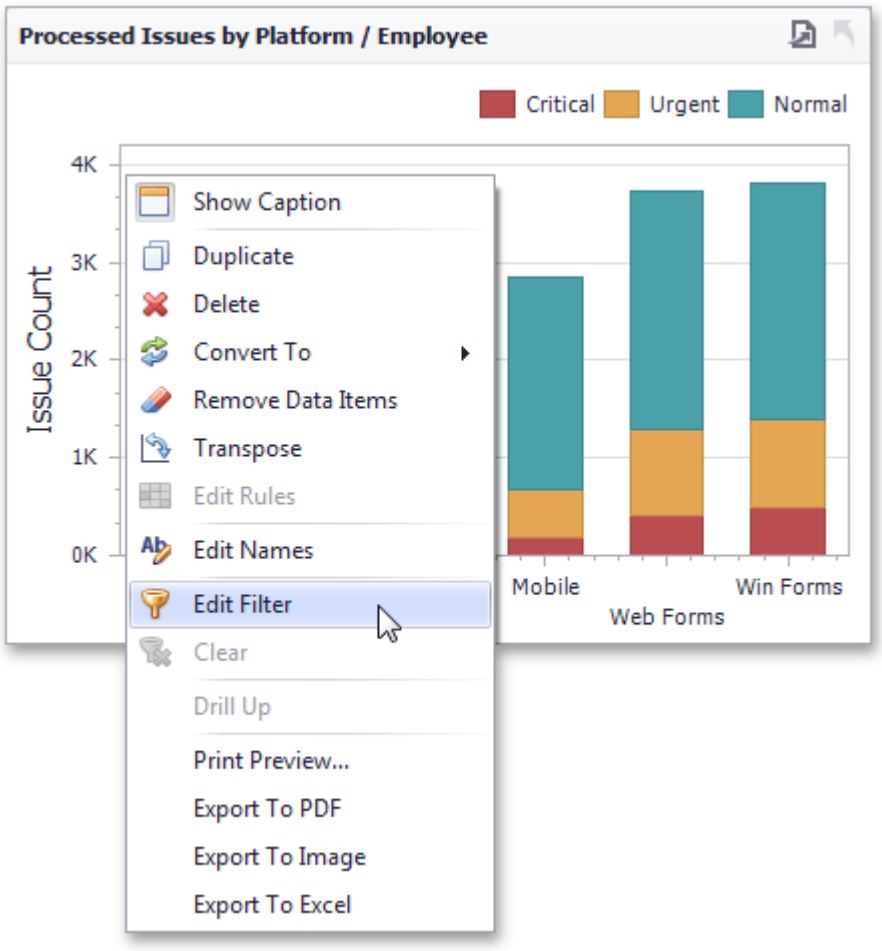
This topic describes how to enable and reset filtering.

Apply Filtering

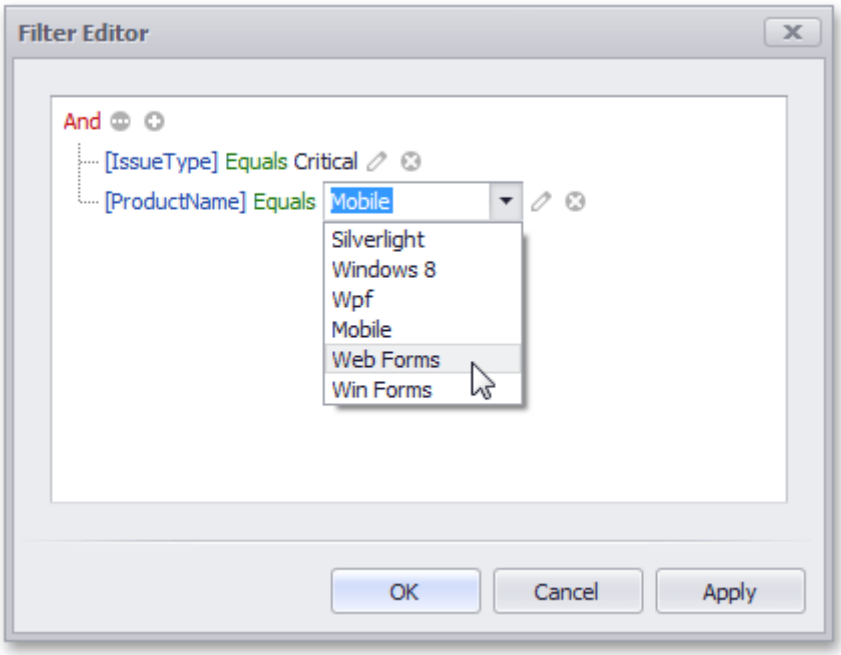
To configure filtering, select the target dashboard item and do one of the

- following. If you are using a Ribbon menu, click the **Edit Filter** button in the **Data** tab.

- Right-click a dashboard item and select **Edit Filter** from its context menu.



This will invoke the **Filter Editor** dialog. Use this dialog to build filter criteria with a convenient tree-like interface.



You can use hidden dimensions within the Filter Editor dialog, allowing you to filter data based on their values.

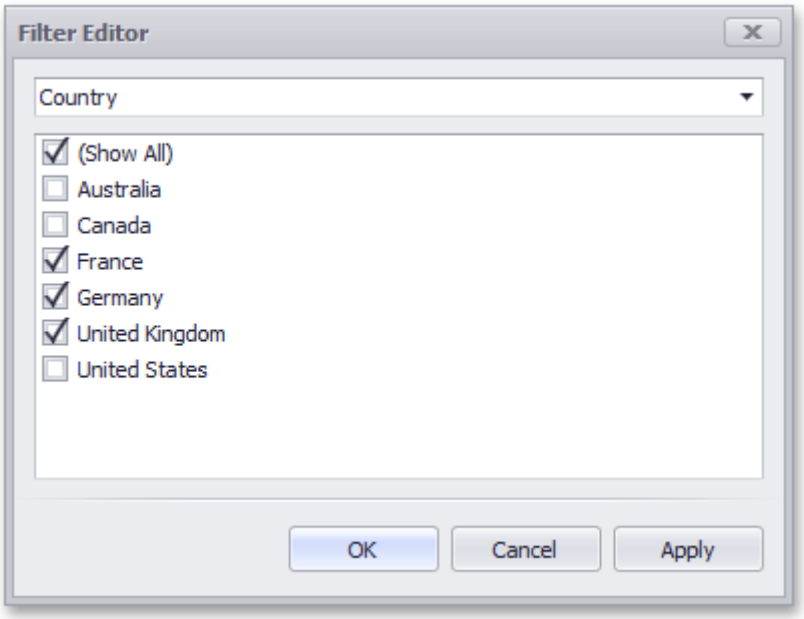
Clear Filtering

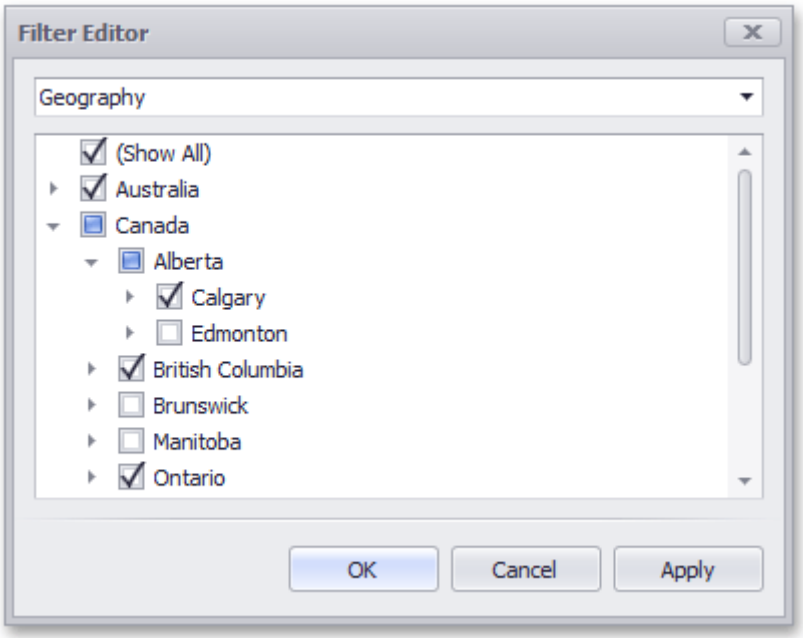
To clear filtering in the Designer, select the target dashboard item and do one of the following.

- If you are using a Ribbon menu, click the **Clear** button in the **Data** tab.

Right-click a dashboard item and select **Clear** from its context menu.

For hierarchies, a tree is displayed instead, allowing you to filter individual values at any hierarchy level.





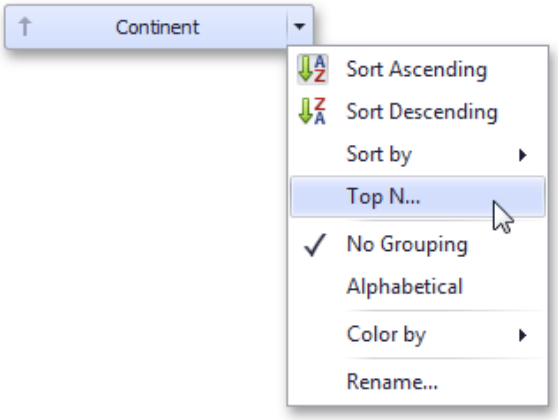
See Also

[Pass Query Parameters]

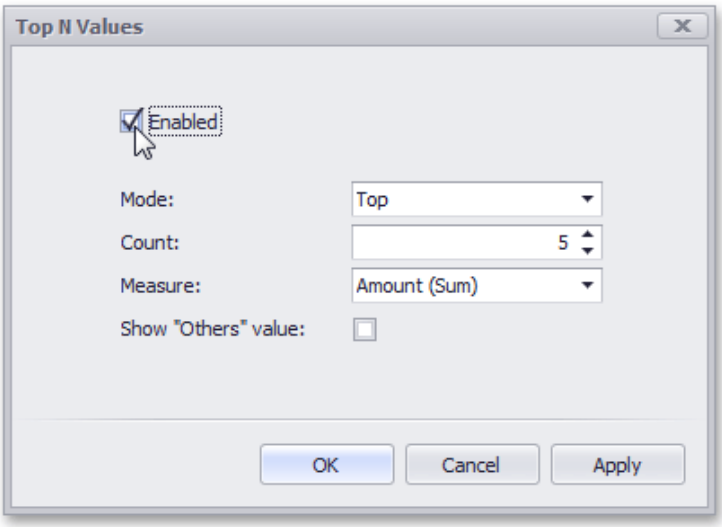
Top N

The Top N feature allows you to display only a limited number of values that correspond to the highest or lowest values of a particular measure.

To display the top values in a dimension, select Top N from the data item menu.



This invokes the **Top N Values** dialog.



In this dialog, check the **Enabled** check box and specify the following settings.

Mode	Specifies whether top or bottom values should be displayed.
Count	The number of values to be displayed.
Measure	The parameter that will determine the top or bottom value.
Show "Others" value	If enabled, all values that are not the top/bottom values are consolidated in the "Others" value.

You can use the hidden measure as a parameter that will determine the top or bottom value.

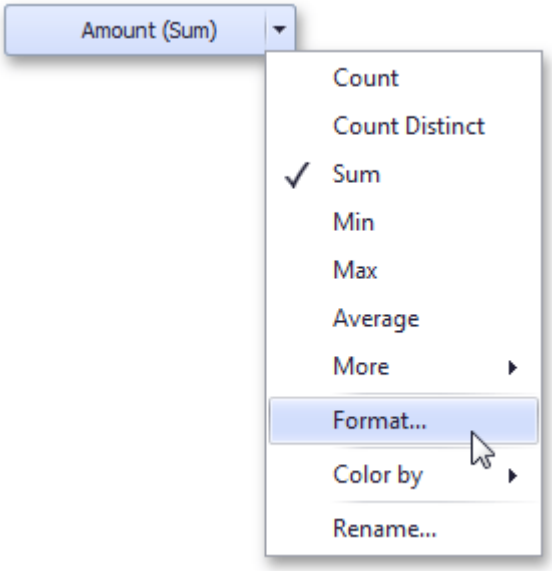
Formatting Data

Dashboard allows you to customize various data format settings for numeric and date-time values.

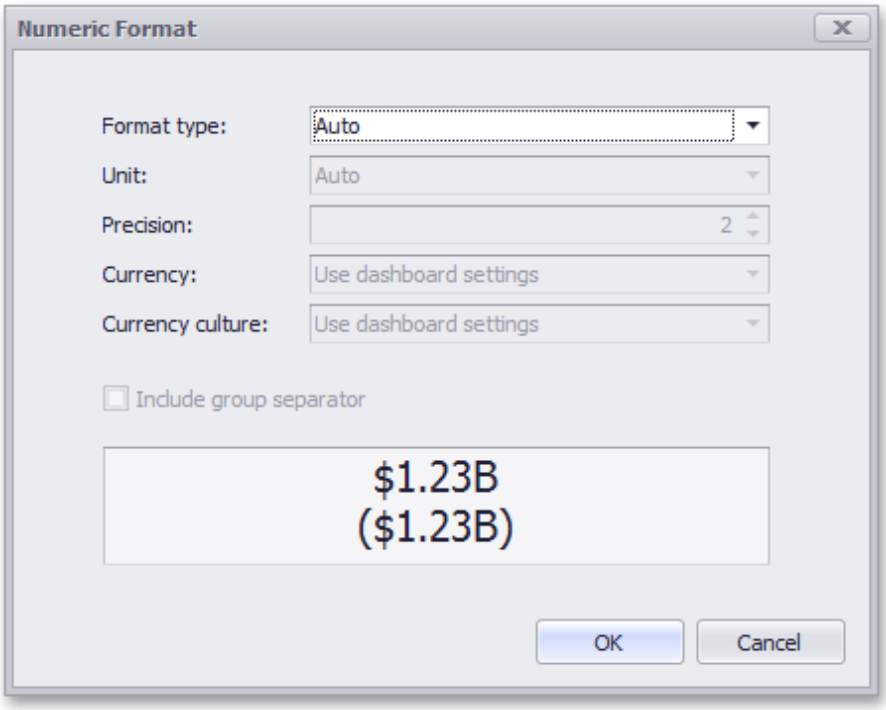
- Formatting Numeric
- Values Formatting Date-
- Time Values Currency
  Formatting Specifics

Formatting Numeric Values

To specify a format for numeric values, select **Format** from the data item menu.



This invokes the **Numeric Format** window.



In the **Format type** field, select the required format type.

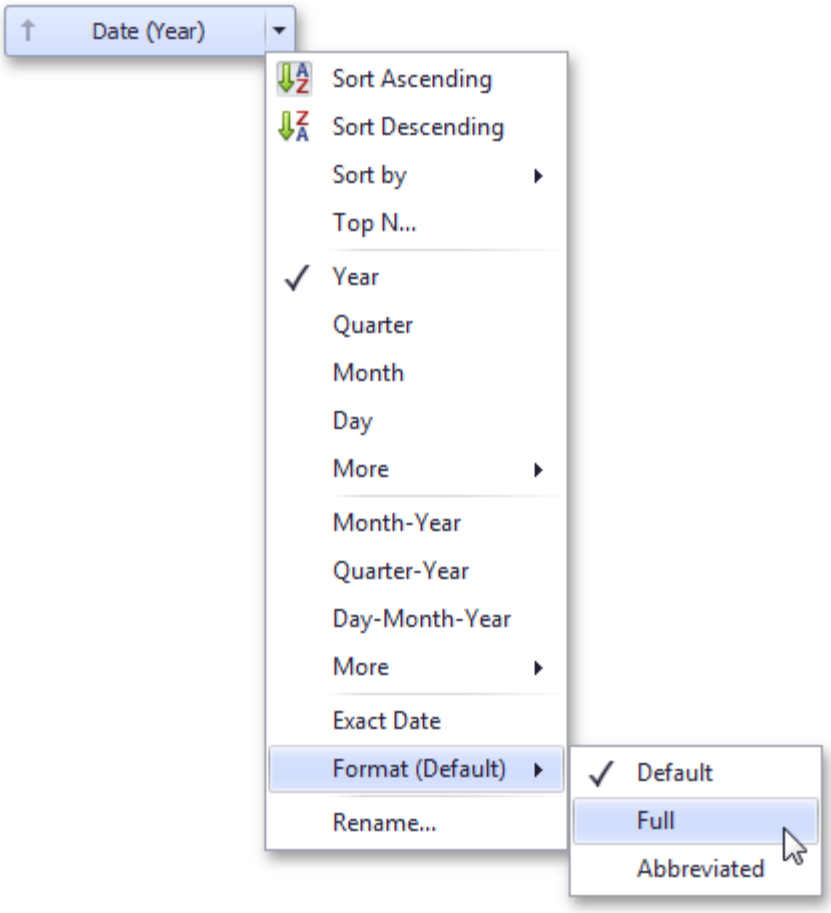
Auto	Format settings are automatically determined based on the data type.
General	Converts a number to the most compact of either fixed-point or scientific notation, depending on the type of the number.
Number	Converts a number to a string of the "-d,ddd,ddd.ddd" form where "-" indicates a negative number symbol (if required), "d" indicates a digit (0-9), "," indicates a group separator, and "." indicates a decimal point symbol.
Currency	Converts a number to a string that represents a currency amount. To learn about currency formatting specifics, see the Currency Formatting Specifics section of this document.
Scientific	Converts a number to a string of the "-d.dddE+ddd" or "-d.ddde+ddd" form where each "d" indicates a digit (0-9).
Percent	Multiplies a number by 100 and converts it to a percentage string.

Other format settings are in effect for only specific format types.

Setting	Description	Format Types
Unit	The unit to which values should be converted.	Number, Currency
Precision	The number of fractional digits that should be displayed.	Scientific, Percent
Currency	Defines the currency sign and format settings that should be used to display currency values. To learn about currency formatting specifics, see the Currency Formatting Specifics section of this document.	Currency
Currency culture	For currencies used in a region with several cultures, specifies the culture that defines format settings.	Currency
Include group separator	Specifies whether or not separators should be inserted between digit groups.	Number, Currency, Percent

Formatting Date-Time Values

To specify a format for date-time values, use the **Format** submenu in the data item menu.



This submenu lists the available format types that depend on the selected group interval (for details on group intervals, see Grouping).

Note

Specific group intervals do not have format options. This means that corresponding values can only be presented in a single manner. The **Format** submenu is not displayed for such group intervals.

The following list shows format types by group interval.

- Year
  - Full - The full year pattern (Example - 6/15/2017 1:45:30 PM -> 2017 (en-US)).
  - Abbreviated - The year from 00 to 99 (Example - 6/15/2017 1:45:30 PM -> 17 (en-US)).
- Quarter
  - F u ll - The full quarter pattern (Example: 6/15/2017 1:45:30 PM -> Q2 (en-US)).
  - N u m eric - The quarter from 1 through 4 (Example: 6/15/2017 1:45:30 PM -> 2 (en-US)).
- Month
  - F u ll - The full name of the month (Example: 6/15/2017 1:45:30 PM -> June (en-US)).
  - Abbreviated - The abbreviated name of the month (Example: 6/15/2017 1:45:30 PM -> Jun (en-US)).
  - N u m eric - The month from 1 through 12 (Example: 6/15/2017 1:45:30 PM -> 6 (en-US)).
- Hour
  - L on g - Long hour pattern, 12-hour format (Example: 6/15/2017 1:45:30 PM -> 1:00 PM).
  - Sh ort - Short hour pattern, 24-hour format (Example: 6/15/2017 1:45:30 PM -> 13).
- Day of Week
  - F u ll - The full name of the day of the week (Example: 6/15/2017 1:45:30 PM -> Monday (en-US)).

- Abbreviated - The abbreviated name of the day of the week (Example: 6/15/2017 1:45:30 PM -> Mon (en-US)).
- Numeric - The day of the week from 1 through 7 (Example: 6/15/2017 1:45:30 PM -> 2 (en-US)).

- Day-Month-Year
  - Long - Long date pattern (Example: 6/15/2017 1:45:30 PM -> Monday, June 15, 2017 (en-US)).
  - Short - Short date pattern (Example: 6/15/2017 1:45:30 PM -> 6/15/2017 (en-US)).
- Date-Hour
  - Long - Long date pattern, long hour pattern (Example: 6/15/2017 1:45:30 PM -> Monday, June 15, 2017 1:00 PM (en-US)).
  - Short - Short date pattern, long hour pattern (Example: 6/15/2017 1:45:30 PM -> 6/15/2017 1:00 PM (en-US)).
  - Timeonly - Long hour pattern (Example: 6/15/2017 1:45:30 PM -> 1:00 PM (en-US)).
- Date-Hour-Minute
  - Long - Long date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> Monday, June 15, 2017 1:45 PM (en-US)).
  - Short - Short date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> 6/15/2017 1:45 PM (en-US)).
  - Timeonly - Long time pattern (Example: 6/15/2017 1:45:30 PM -> 1:45 PM (en-US)).
- Date-Hour-Minute-Second
  - Long - Long date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> Monday, June 15, 2017 1:45:30 PM (en-US)).
  - Short - Short date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> 6/15/2017 1:45:30 PM (en-US)).
  - Timeonly - Long time pattern (Example: 6/15/2017 1:45:30 PM -> 1:45:30 PM (en-US)).

The list below illustrates format types related to the **Exact Date** group interval.

- Year
  - Full - The full year pattern (Example: 6/15/2017 1:45:30 PM -> 2017 (en-US)).
  - Abbreviated - The year from 00 to 99 (Example: 6/15/2017 1:45:30 PM -> 17 (en-US)).
- Quarter
  - n/a - The default year and full quarter pattern (Example: 6/15/2017 1:45:30 PM -> Q2 2017 (en-US)).
- Month
  - n/a - The default year pattern and the full name of the month (Example: 6/15/2017 1:45:30 PM -> June, 2017 (en-US)).
- Day
  - Long - Long date pattern (Example: 6/15/2017 1:45:30 PM -> Monday, June 15, 2017 (en-US)).
  - Short - Short date pattern (Example: 6/15/2017 1:45:30 PM -> 6/15/2017 (en-US)).
- Hour
  - Long - Long date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> Monday, June 15, 2017 1:00 PM (en-US)).
  - Short - Short date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> 6/15/2017 1:00 PM (en-US)).
  - Timeonly - Long time pattern (Example: 6/15/2017 1:45:30 PM -> 1:00 PM (en-US)).
- Minute
  - Long - Long date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> Monday, June 15, 2017 1:45 PM (en-US)).
  - Short - Short date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> 6/15/2017 1:45 PM (en-US)).

Tim e on ly - Long time pattern (Example: 6/15/2017 1:45:30 PM -> 1:45 PM (en-US)).

Second

L on g - Long date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> Monday, June 15, 2017 1:45:30 PM (en-US)).

Sh ort - Short date pattern, long time pattern (Example: 6/15/2017 1:45:30 PM -> 6/15/2017 1:45:30 PM (en-US)).

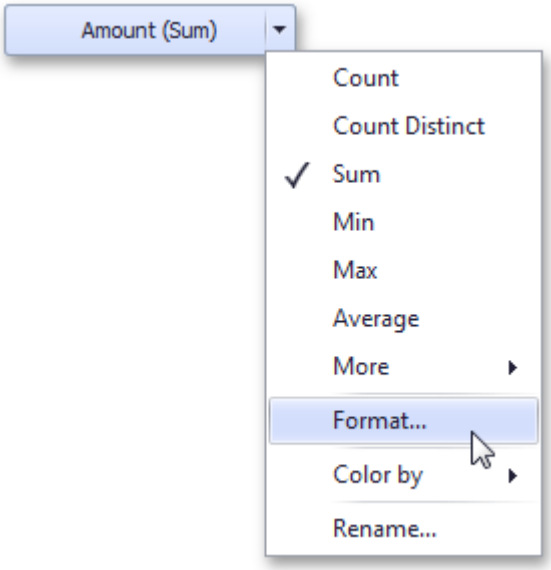
Tim e on ly - Long time pattern (Example: 6/15/2017 1:45:30 PM -> 1:45:30 PM (en-US)).

Currency Formatting Specifics

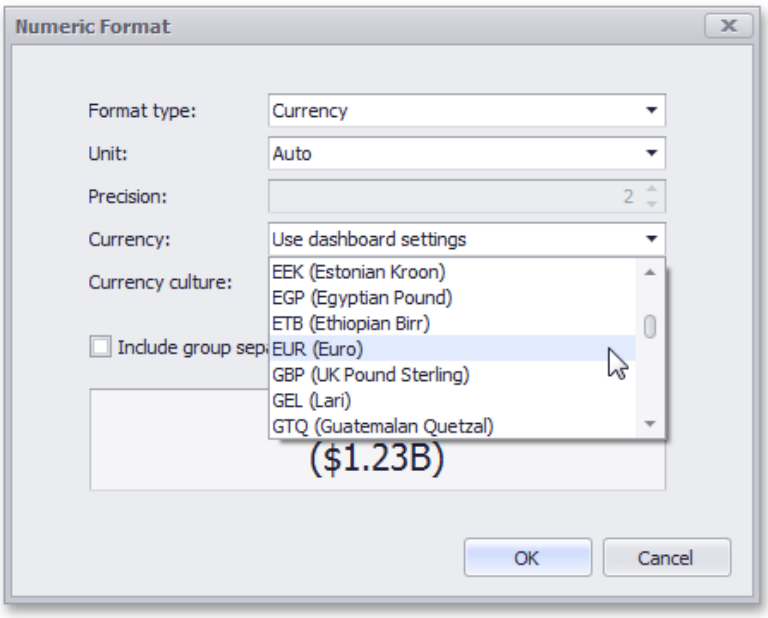
The Dashboard allows you to specify a currency format at two levels: for the entire dashboard and for individual data items.

Data Item Currency

To specify which currency to use for a particular data item, select **Format** from the data item menu.



In the Numeric Format dialog, select Cu rren cy in the Format type field and use the Currency combo box to select the required currency.



Note

This option only affects the way values are displayed. The Dashboard **does not** convert monetary amounts from one currency to another.

For regions with several cultures, you can also select the culture that will be used to format currency values.

You can also apply the default dashboard currency by selecting U s e das h board s ettin gs in the Currency

field.

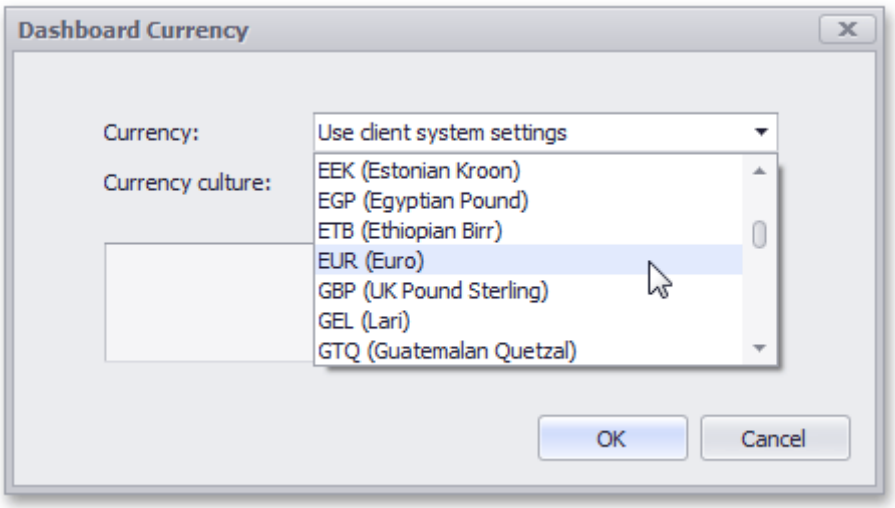
Dashboard Currency

You can also specify the default currency for the dashboard. This setting will be applied to dashboard items that have no currency defined.

To set the dashboard currency, click the Currency button in the Ribbon.

This invokes the Dashboard Currency window. In this window, select the required currency using the

Currency combo box.



Note

This option only affects the way values are displayed. The Dashboard **does not** convert monetary amounts from one currency to another.

For regions with several cultures, you can also select the culture that will be used to format currency values.

Additionally, you can specify the client culture that should be used for the dashboard by selecting the U s e clien t s ys tem s ettin gs item. In this instance, the current system culture will be used in WinForms applications, and the client culture will be used in Web applications.

Interactivity

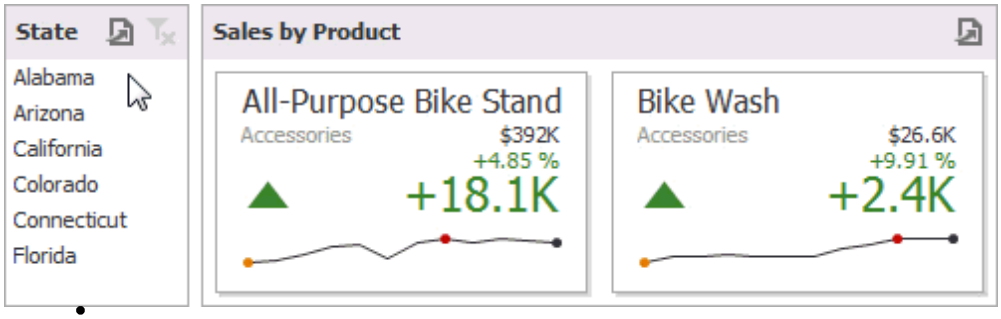
This section describes features that enable interaction between various dashboard items. These features include Master Filtering and Drill-Down.

The section consists of the following topics.

- Master Filtering
- Drill-Down

Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). You can select elements in a Master Filter item (grid records, chart bars, pie segments, etc.) to filter data in other dashboard items by the selected values.



- Master Filtering
- Overview Master Filter Settings Apply Filtering

Master Filtering Overview

Dashboard items can be divided into four groups by their master filtering capabilities.

Data visualization dashboard items allow you to enable master filtering by specifying the selection mode. The following dashboard items allow you to manage their master filtering mode.

Chart Scatter Chart Grid

Pies Cards Gauges

Choropleth Map Geo Point Maps Treemap

To learn how to manage master filtering for these items, see Master Filter Settings.

1. Filter elements represent a special type of dashboard item whose main purpose is to apply filtering to other dashboard items. This capability is always enabled for these dashboard items.

   - The following filter elements are available.

   Combo Box List Box Tree View

Instead of switching between standard master filtering modes, some filter elements allow you to switch their type. This allows you to select a single value or multiple values.

To learn more, see the Filter Elements section.

1. Range Filter is a special type of dashboard item that displays a chart with selection thumbs and allows you to filter out values displayed along the argument axis.

To learn more, see the Range Filter section.

2. **Dashboard item group** allows you to manage interaction between dashboard items in and out of the group.

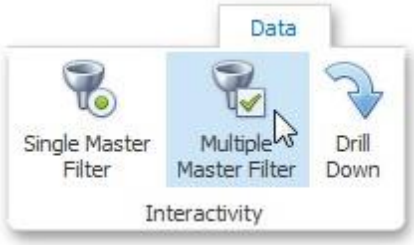
To learn more about the interactivity capabilities of the dashboard item group, see the Interactivity paragraph in the Dashboard Item Group topic.

The Master Filter item supports two selection modes.

- M u ltiple - Allows you to select multiple elements in the Master Filter item.
- Sin gle - Allows you to select only one element in the Master Filter item. When this mode is enabled, the default selection will be set to a Master Filter element. You can change this selection, but cannot clear it.

To enable/disable master filtering, use the **Multiple Master Filter** or **Single Master Filter** buttons in the **Data**

Ribbon tab.



Note

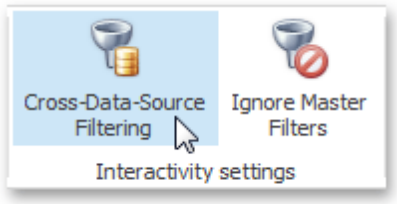
If the selected dashboard item contains several types of elements that can be used for filtering, the Ribbon or Toolbar will provide the appropriate buttons to switch between these types (e.g., the **Arguments** and **Series** buttons in the Chart). For details, refer to the documentation for individual dashboard items in the Designing Dashboard Items section.

Filtering Across Data Sources

When different items in a dashboard are bound to different data sources, you can specify that a particular Master Filter should be applied across data sources. This means that it will apply filtering to fields with matching names in all data sources.

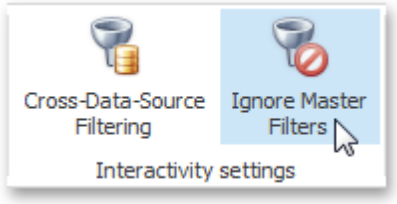
Fields are matched by their full names. For fields in other data sources to be affected by Master Filtering, their names must match the name of the field in the current data source, and they must belong to the same hierarchy level so that their full names also match. For instance, Customer.City and Customer.Address.City will not be treated as matching fields.

To enable filtering across data sources, use the **Cross-Data-Source Filtering** button in the **Data** Ribbon tab.



Preventing Items from Being Filtered

You can prevent specific dashboard items from being affected by Master Filters. To do this, use the **Ignore Master Filters** button in the **Data** Ribbon tab.

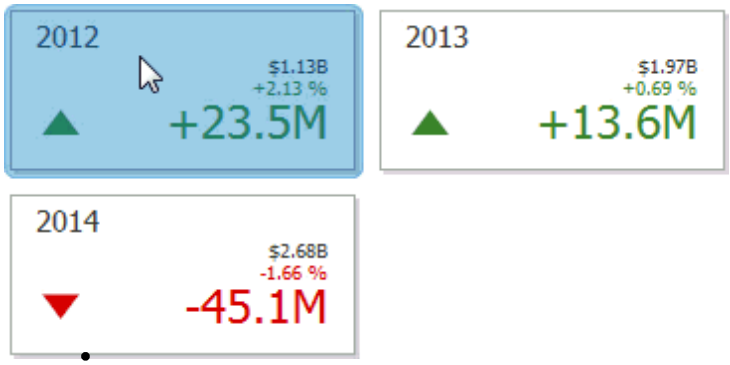


Apply Filtering

To learn how to apply filtering in a specific dashboard item, refer to the **Master Filtering** topic in the **Interactivity** section for this item.

Drill-Down

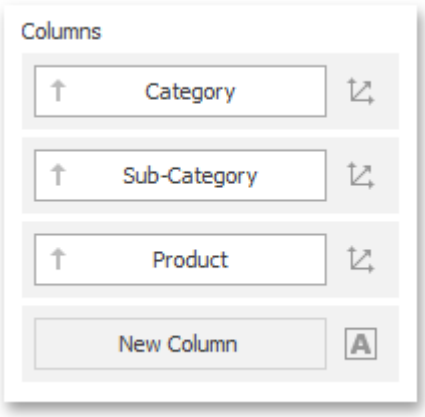
Dashboard provides the Drill-Down feature, which allows you to change the detail level of data displayed in a dashboard item. The Drill-Down feature enables users to drill down to display detail data, or drill up to view more general information.



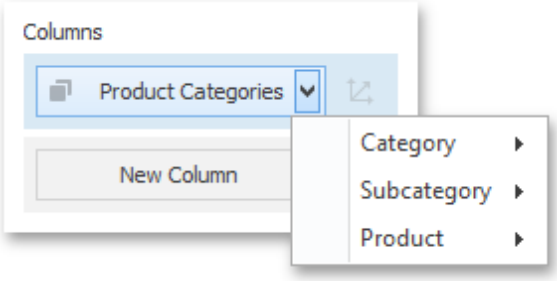
- Enable Drill-Down
- Perform Drill-Down

Enable Drill-Down

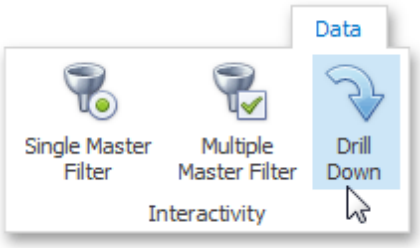
Drill-down requires that the data section contains several dimensions...



... or a hierarchy data item.



To enable drill-down, click the **Drill-Down** button in the **Data** Ribbon tab (or the button if you are using the toolbar menu).



Note

If the selected dashboard item contains several types of elements that can be used for drill-down, the Ribbon or Toolbar will provide the appropriate buttons to switch between these types (e.g., **Arguments** and **Series** buttons in a Chart). For details, refer to the documentation for the individual dashboard items in the Designing Dashboard Items topic.

The following dashboard items support the Drill-Down feature.

- Chart
- Scatter
- Chart
  Grid
- Pies Cards
- Gauges
- Treemap
-

Perform Drill-Down

To learn how you can drill down using a particular dashboard item, refer to the **Drill-Down** topic in the **Interactivity** section for this item.

Appearance Customization

The topics in this section describe how to customize the appearance of a dashboard or any of its elements using conditional formatting and coloring.

This section contains the following topics.

- Conditional
- Formatting

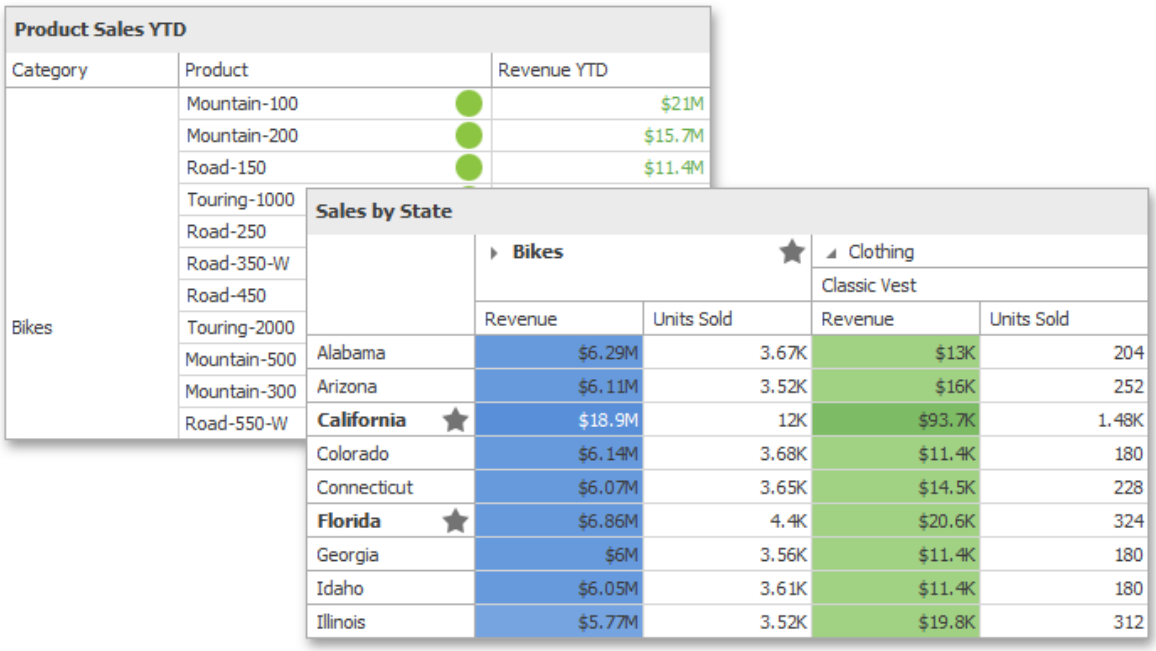
  Coloring

Conditional Formatting

The Dashboard Designer provides the capability to apply formatting to dashboard item elements whose values meet the specified condition. This feature allows you to highlight specific elements using a predefined set of rules.

To learn more about specifics of using a conditional formatting feature for different dashboard items, see the following topics.

- Conditional Formatting -
- Grid Conditional Formatting - Pivot



The current topic describes the following common concepts.

- Conditional Formatting
- Overview Create a Format Rule
- Specify Appearance
- Settings Edit a Format Rule

Conditional Formatting Overview

Comparison rules used in conditional formatting can be divided into the following groups.

- Value - Allows you to compare static values (such as Greater Than, Less Than, Between,
- etc.). Top-Bottom - Highlights a specific number of topmost/bottommost values.
- Average - Highlights values above the average value or below the average value.
- A Date Occurring - Allows you to highlight date-time values that fall into a specified interval.
- Expression - Allows you to use complex conditions to apply formatting. You can also pass dashboard parameters to expressions.
- Icon Ranges - Allows you to apply formatting by displaying specific icons for different ranges of values. You can select a predefined set of icons or use a specific icon for each range.

- Color Ranges - Allows you to apply formatting using specific colors for different ranges of values. You can

select a predefined set of colors or use custom appearance settings to highlight values within specified ranges.

- Gradient Ranges - Allows you to apply formatting using gradient color scales.
- Bar - Allows you to visualize numeric values using bars. You can also color bars corresponding to positive and negative values using different colors.
- Bar Color Ranges - Allows you to visualize numeric values using bars whose colors are contained in the specified color set.
- Bar Gradient Ranges - Allows you to visualize numeric values using bars whose colors are contained in the specified color gradient.

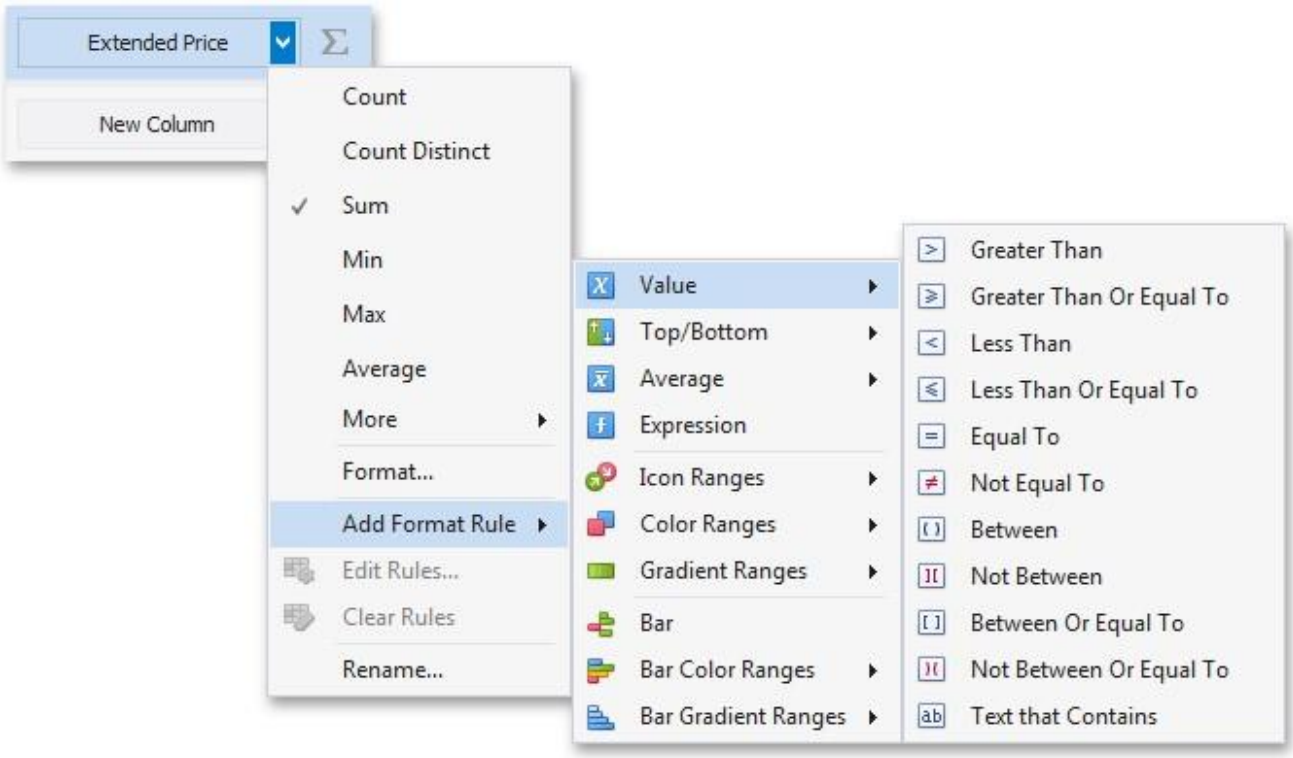
You can create comparison rules for measures or dimensions. The list below shows format conditions that can be applied to different types of data items.

- Measure/numeric
  - Dimension Value
  - Top-Bottom
  - Average
  - Expression
  - Icon Ranges
  - Color Ranges
  - Gradient
  - Ranges
    Bar
  - Bar Color
  - Ranges Bar
    Gradient
    Ranges
- string Dimension
  - Value with the condition type set to E qu al To, N ot E qu al To or Text th at Con tain s
  - Expression
- date-time
  - Dimension Value
  - A Date Occuring for dimensions with the continuous date-time group interval
  - Expression
  - Icon
  - Ranges
  - Color
  - Ranges
    Gradient
    Ranges
    Bar
  - Bar Color
  - Ranges Bar
    Gradient
    Ranges

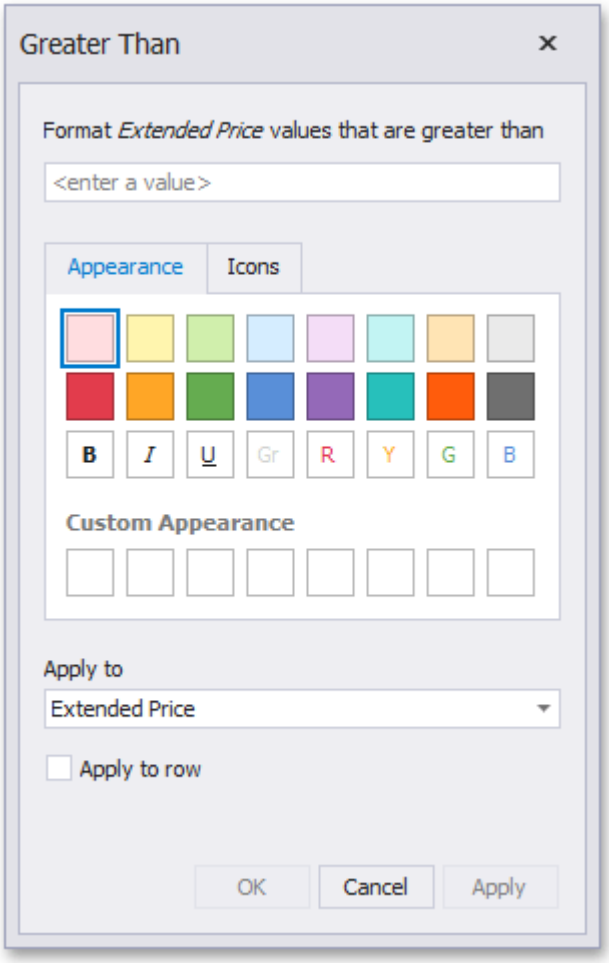
Create a Format Rule

To create a new rule used to apply formatting according to the required condition, do the following.

1. Choose a measure/dimension by whose values a format condition will be calculated. Click the measure/ dimension menu button, select Add Format Rule and choose the condition



2. This invokes the dialog that depends on the selected format condition and the type of dashboard item. For instance, the image below displays the Greater Than dialog corresponding to the Value format condition for the Grid dashboard item.



In this dialog, specify settings specific for the selected condition (for instance, specify a value to compare with dimension/measure values). To learn more, see the documentation for the required condition.

1. Specify appearance settings applied to elements whose values meet the specified condition. 4.Specify the data item to whose values conditional formatting is applied using the **Apply to** combo box.

Thus, you can create a format rule for one data item and apply new appearance settings to the other data item. You can also create format rules for hidden measures and apply formatting to values of visible data items.

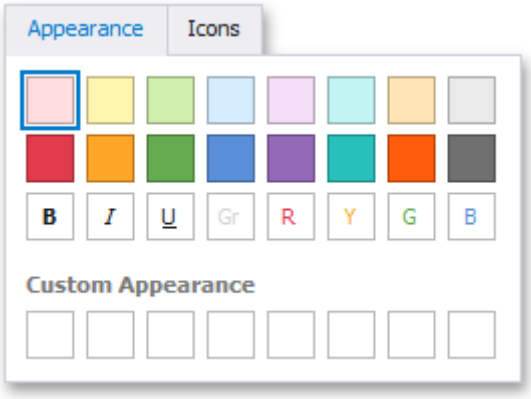
Note

Different dashboard items can provide additional capabilities for creating a new format rule. To learn more, refer to documentation for the required dashboard item.

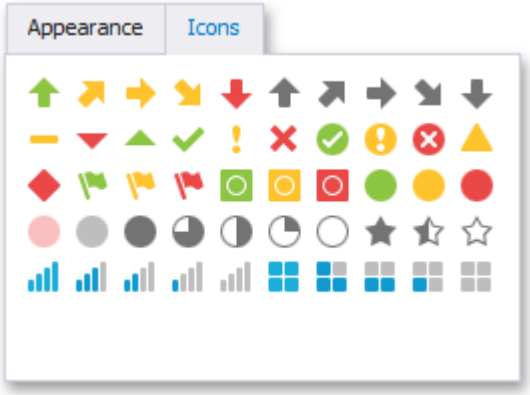
Specify Appearance Settings

When creating a new format rule, you can select the required appearance settings applied according to the current format condition. All format conditions allow you to customize appearance settings in a similar manner. For instance, the Value format condition allows you to specify appearance settings in the following way:

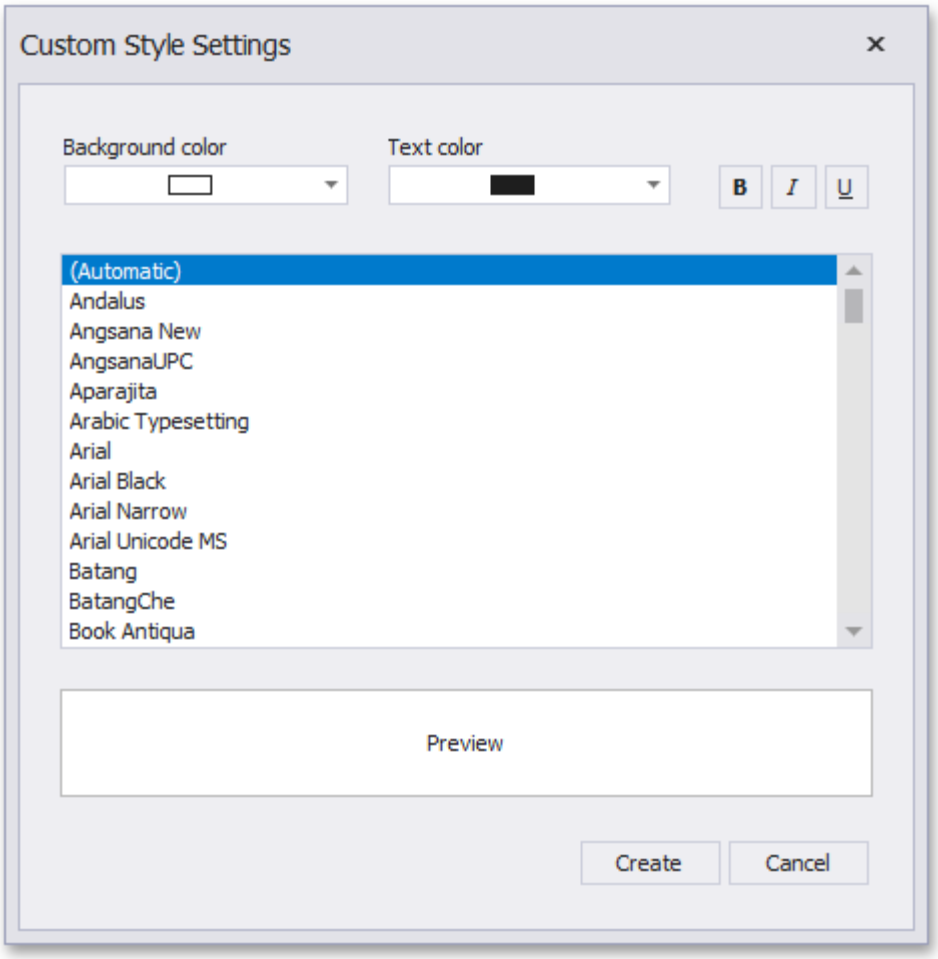
- The **Appearance** tab allows you to choose the predefined background color/font.



- The **Icons** tab allows you to add the predefined icon.



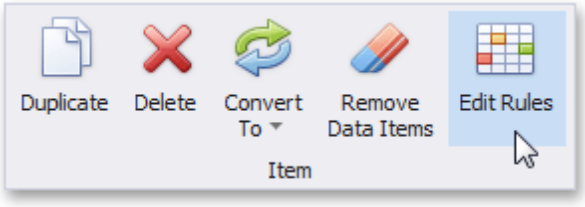
- Use the **Custom Appearance** area in the **Appearance** tab to add presets containing custom appearance settings. To add a new preset, click an empty square. This invokes the **Custom Style Settings** dialog, allowing you to specify the required appearance settings.



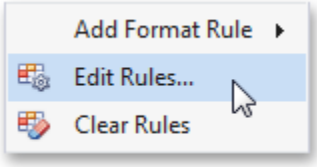
In this dialog, you can specify the backgoround/foreground colors and font settings. Click Create to add a preset. The created preset will be displayed in the Custom Appearance area.

Edit a Format Rule

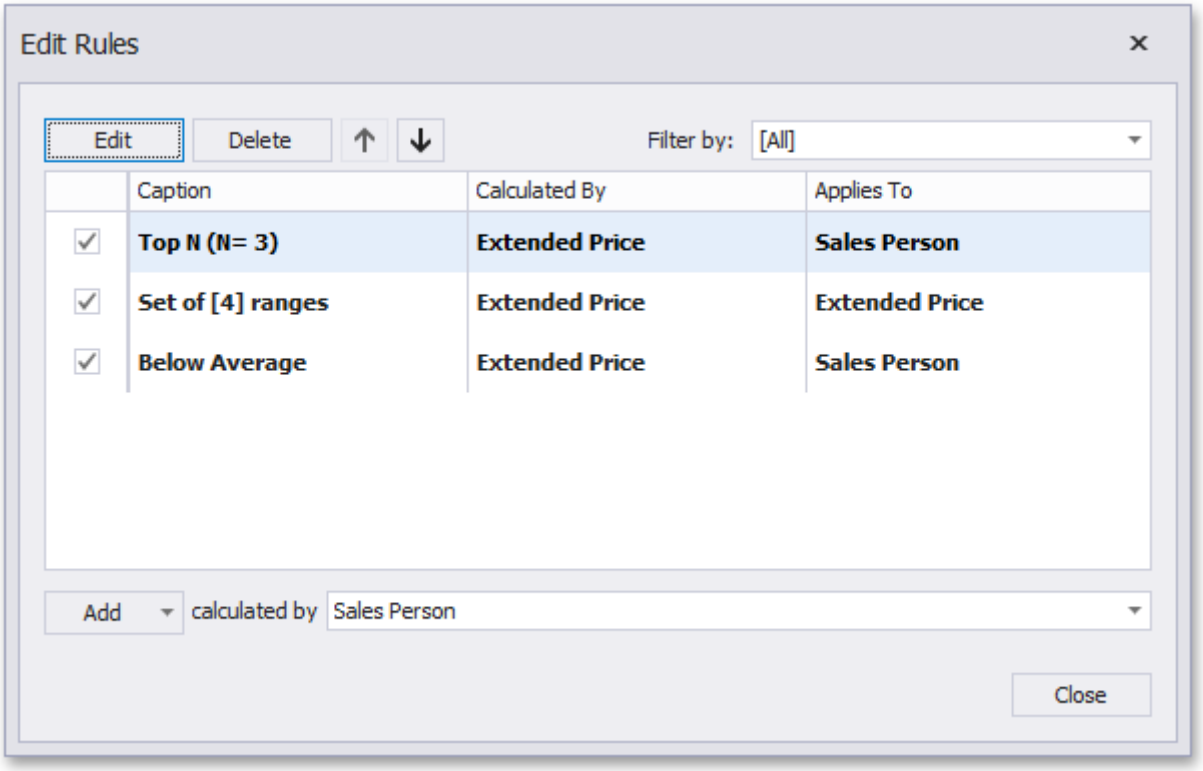
To edit format rules for the selected dashboard item, click the **Edit Rules** button in the **Home** ribbon tab.



As an alternative, use the **Edit Rules** data item's menu item or the corresponding item in the dashboard item's context menu.



This invokes the **Edit Rules** dialog containing existing format rules for this dashboard item.



This dialog allows you to perform the following actions.

- To edit the selected rule, use the **Edit** button or double-click the required
- rule. To delete the selected rule, use the **Delete** button.
- To reorder format rules, use the **Up** and **Down** buttons (the and icon, respectively). Reordering of rules allows you to specify the priority of rules from higher (a bottommost rule) to lower (a topmost rule).
- To enable/disable the required rule, use the corresponding check box on the left column.
- To create a new rule, click the **Add** button and select the required format condition. The **calculated by** combo box allows you to select the measure/dimension by whose values a format rule is
- applied. To filter format rules by the specified data item, use the **Filter by** combo box.

To clear all rules for the specified data item, use the **Clear Rules** button in the data item's context menu.

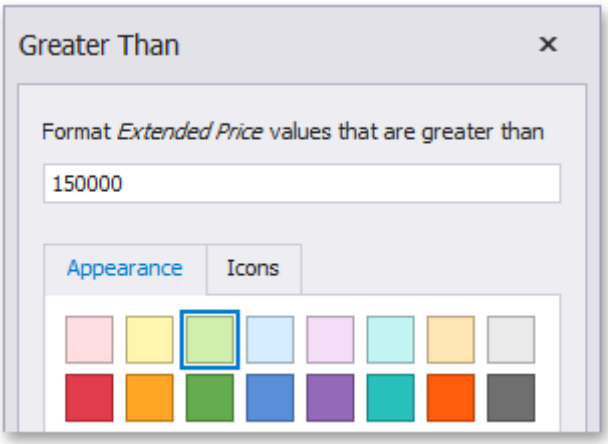
Value

The Value format condition allows you to compare static values (such as Greater Than, Less Than, Between, etc.).

The following condition types are supported for measures or date-time dimensions:

Greater Than/Greater Than or Equal To

The "Greater Than"/"Greater Than or Equal To" format conditions allow you to apply formatting to elements whose values are greater than/greater than or equal to the specified value. For instance, the following image displays a Grid dashboard item whose Extended Price cells are filled in green if their values are Greater Than 150 000.

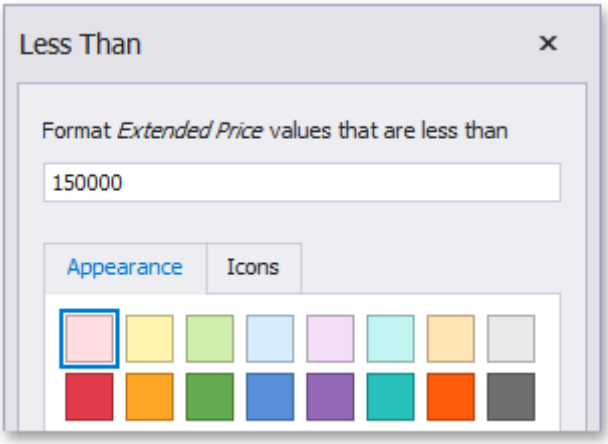


Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

This format condition can be applied to measures or date-time dimensions.

Less Than/Less Than or Equal To

The "Less Than"/"Less Than or Equal To" format conditions allow you to apply formatting to elements whose values are less than/less than or equal to the specified value. For instance, the following image displays a Grid dashboard item whose Extended Price cells are filled in red if their values are Less Than 150 000.

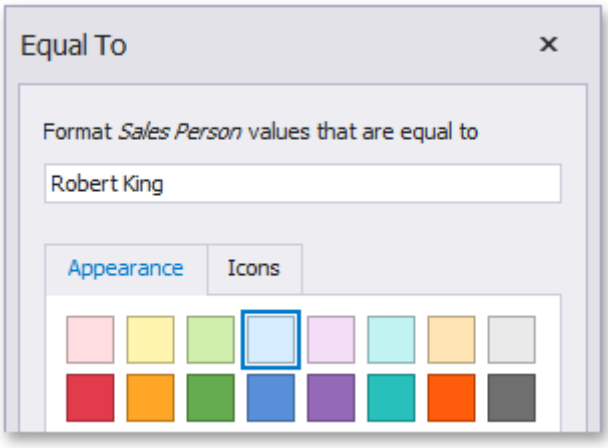


Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

This format condition can be applied to measures or date-time dimensions.

Equal To/Not Equal To

The "Equal To"/"Not Equal To" format conditions allow you to apply formatting to elements whose values are equal to/not equal to the specified value. For instance, the following image displays a Grid dashboard item whose Sales Pers on cells are filled in blue if their values are equal to 'Robert King'.

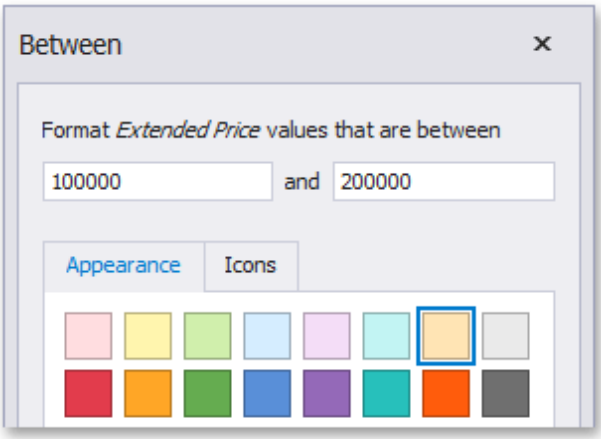


Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

This format condition can be applied to measures, string or date-time dimensions.

Between/Not Between

The "Between"/"Not Between" format conditions allow you to apply formatting to elements whose values are between/not between the specified values. For instance, the following image displays a Grid dashboard item whose E xten ded Price cells are filled in orange if their values are Between 100 000 and 200 000.

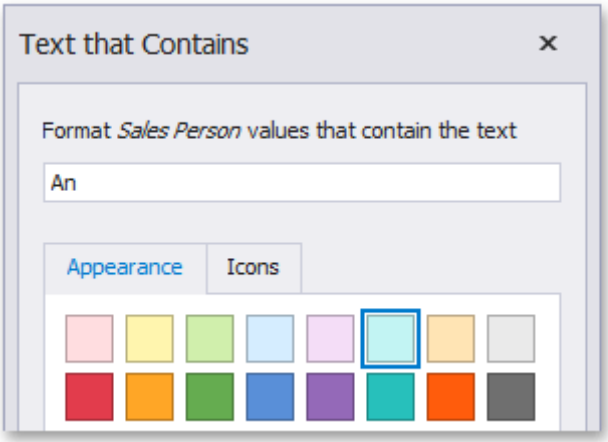


Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

This format condition can be applied to measures or date-time

- dimensions. Text That Contains

The "Text That Contains" format condition allows you to apply formatting to elements whose values contain the specified text. For instance, the following image displays a Grid dashboard item whose Sales Pers on cells are in cyan if their values contain the 'An' text.



Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

This format condition can be applied to measures, string or date-time dimensions.

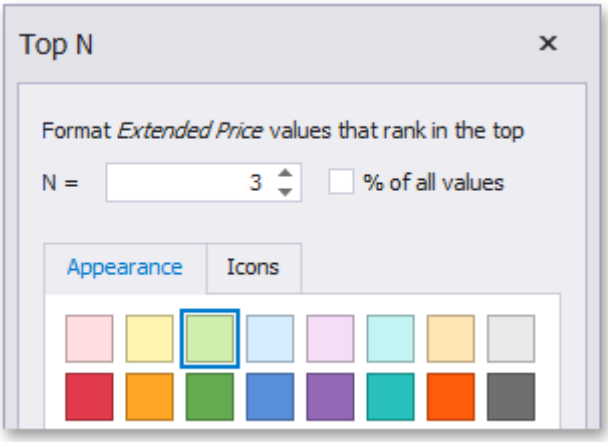
Top-Bottom

The Top-Bottom format conditions allow you to highlight a specific number of topmost/bottommost values. You can specify this number as an absolute or percent value.

The following condition types are supported for measures:

Top N

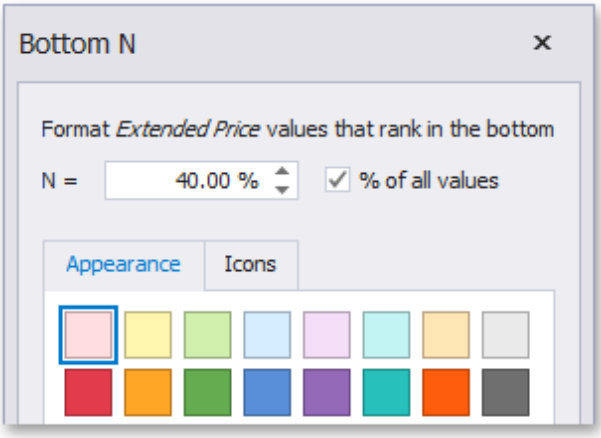
The "Top N" format condition allows you to apply formatting to elements whose values are ranked at the top. For instance, the following image displays a Grid dashboard item whose top 3 E xten ded Price values filled in green.



Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

Bottom N

The "Bottom N" format condition allows you to apply formatting to elements whose values are ranked at the bottom. For instance, the following image displays a Grid dashboard item whose bottom 40 percent Exten ded Price values are filled in red.



Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

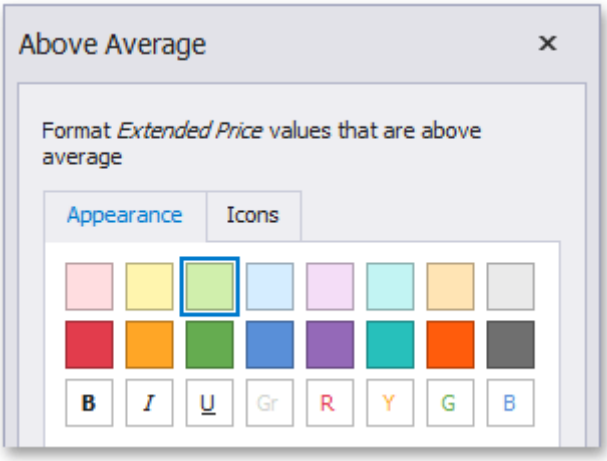
Average

The Average format conditions allow you to highlight values above or below an average value.

The following condition types are supported for measures:

Above Average/Above or Equal Average

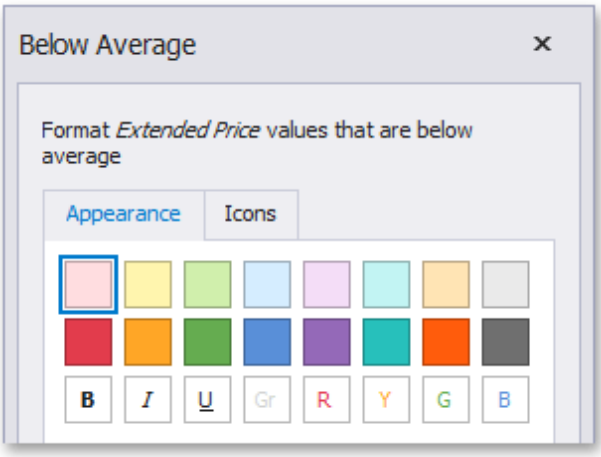
The "Above Average"/"Above or Equal Average" format conditions allow you to apply formatting to elements whose values are above/above or equal to the average. For instance, the following image displays a Grid dashboard item whose E xten ded Price values that are above average (~ 141 000) filled in green.



Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

Below Average/Below or Equal Average

The "Below Average"/"Below or Equal Average" format conditions allow you to apply formatting to elements whose values are below/below or equal to the average. For instance, the following image displays a Grid dashboard item whose E xten ded Price values that are below average (~ 141 000) filled in red.



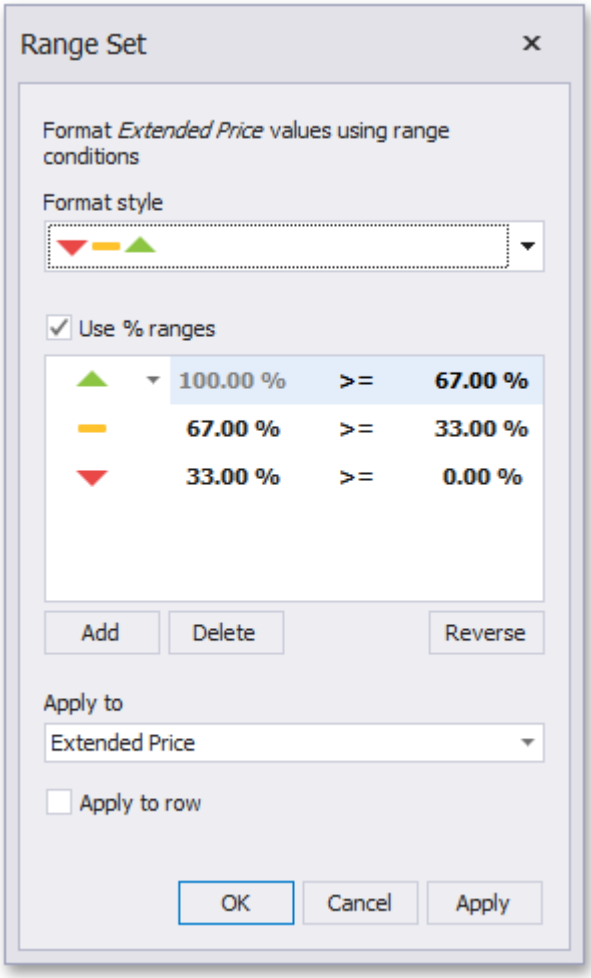
Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

Icon Ranges

Icon Ranges allow you to use predefined or custom sets of icons to apply conditional formatting to different ranges of values.

To format values according the required condition, click the data item menu button, select Add Format Rule | Icon Ranges and choose the required icon set.

This invokes the Range Set dialog containing the set of value ranges and corresponding icons. The Grid dashboard item on the right displays the default formatting applied using the predefined set of 3 icons.



Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

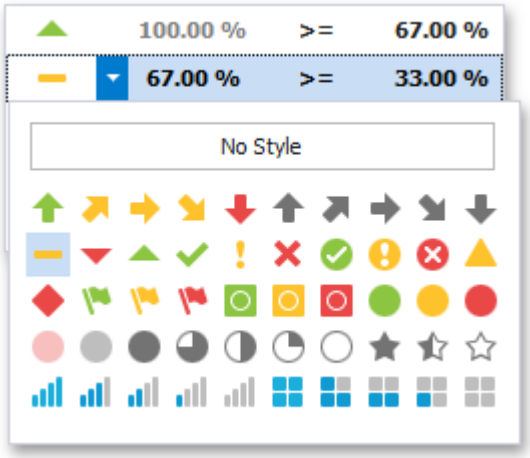
This dialog allows you to change the following options specific to Icon Ranges.

- The **Format Style** combo box allows you to change the icon set used to apply formatting.
- The **Use % ranges** check box specifies whether the percent or absolute scale is used to generate ranges.

Note

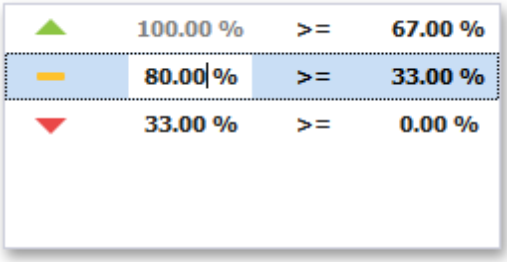
Note that this option is not available for date-time dimensions.

To change the icon displayed for values corresponding to the specified range, click the button next to the required icon and select a new icon.



Select **No Style** to disable the indication for the required range.

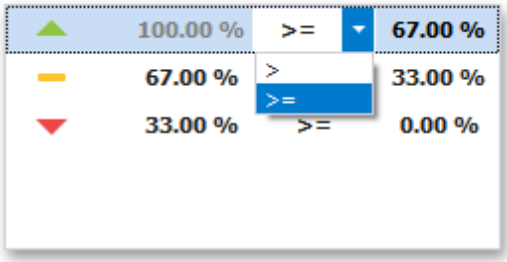
- You can change range boundaries by specifying the required values.



Note

Note that a new value should fall into a range between corresponding values of the previous and next range.

- To change the comparison logic for the required range, click the comparison sign and select the required option.



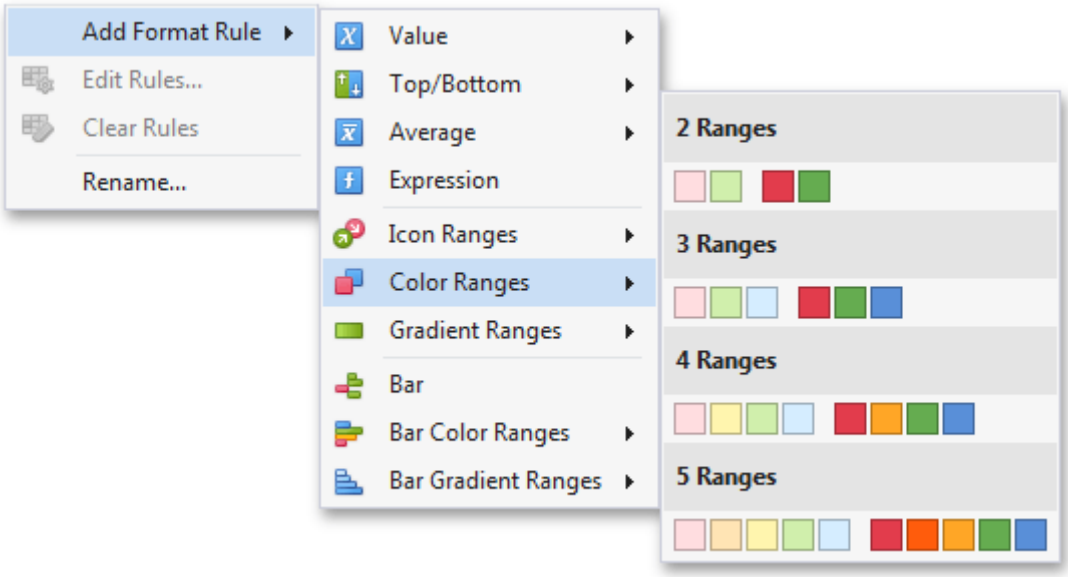
The greater or equal sign includes the smallest value of the current interval while the greater sigh excludes the smallest value from the current interval and includes it in the next interval.

- Use the **Add** and **Delete** buttons to add new ranges or delete the selected range respectively. Note that new range is added below the selected range.

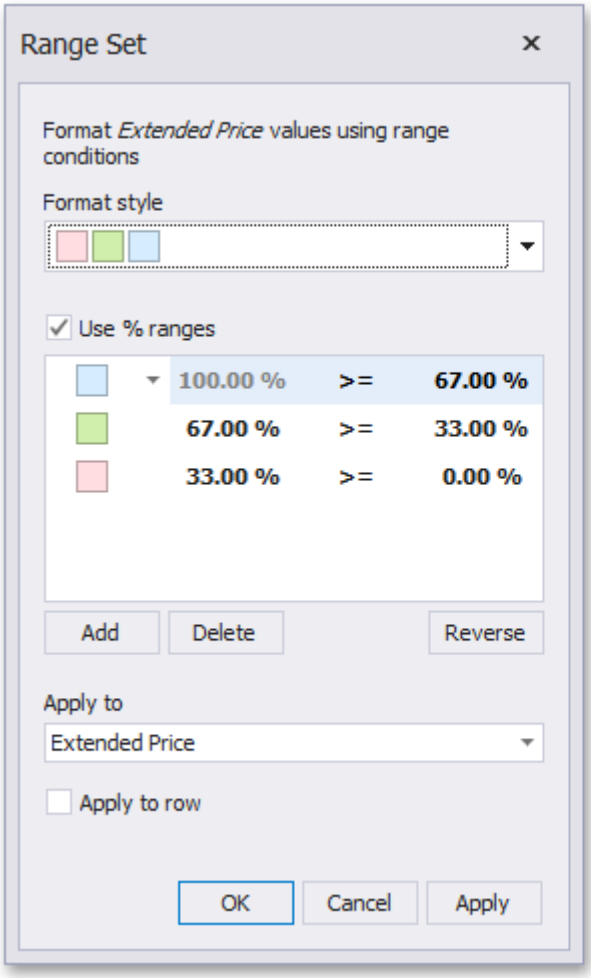
Color Ranges

Color Ranges allow you to use predefined sets of colors to apply conditional formatting to different ranges of values. You can also use custom appearance settings for specific ranges.

To format values according the required condition, click the data item menu button, select Add Format Rule | Color Ranges and choose the required icon set.



This invokes the Range Set dialog containing the set of value ranges and corresponding appearance settings. The Grid dashboard item on the right displays the default formatting applied using the predefined set of 3 colors.



Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

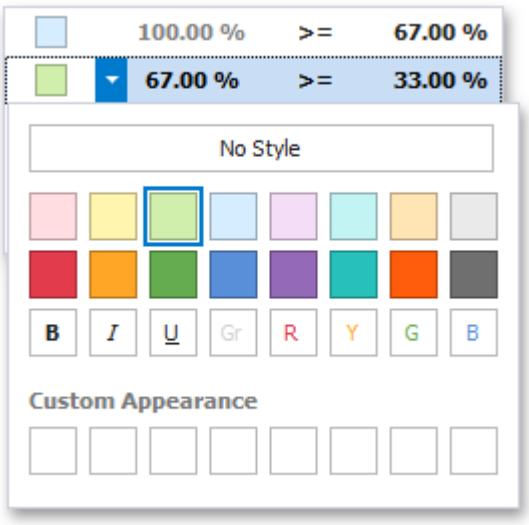
This dialog allows you to change the following options specific to Icon Ranges.

- The **Format Style** combo box allows you to change the color set used to apply formatting.
- The **Use % ranges** check box specifies whether the percent or absolute scale is used to generate ranges.

Note

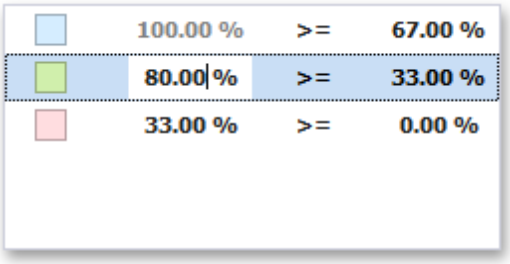
Note that this option is not available for date-time dimensions.

- To change the appearance settings applied to values corresponding to the specified range, click the button next to the required color and select a new color or specify custom appearance settings. To learn how to specify custom settings, see the **Specify Appearance Settings** paragraph in the Conditional Formatting topic.



Select **No Style** to disable the indication for the required range.

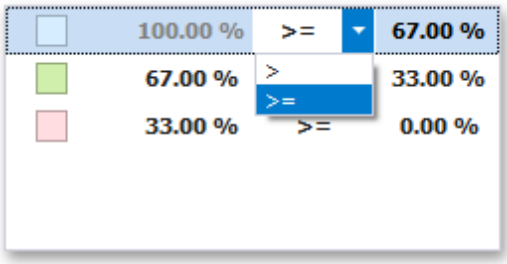
- You can change range boundaries by specifying the required values.



Note

Note that a new value should fall into a range between corresponding values of the previous and next range.

- To change the comparison logic for the required range, click the comparison sign and select the required option.



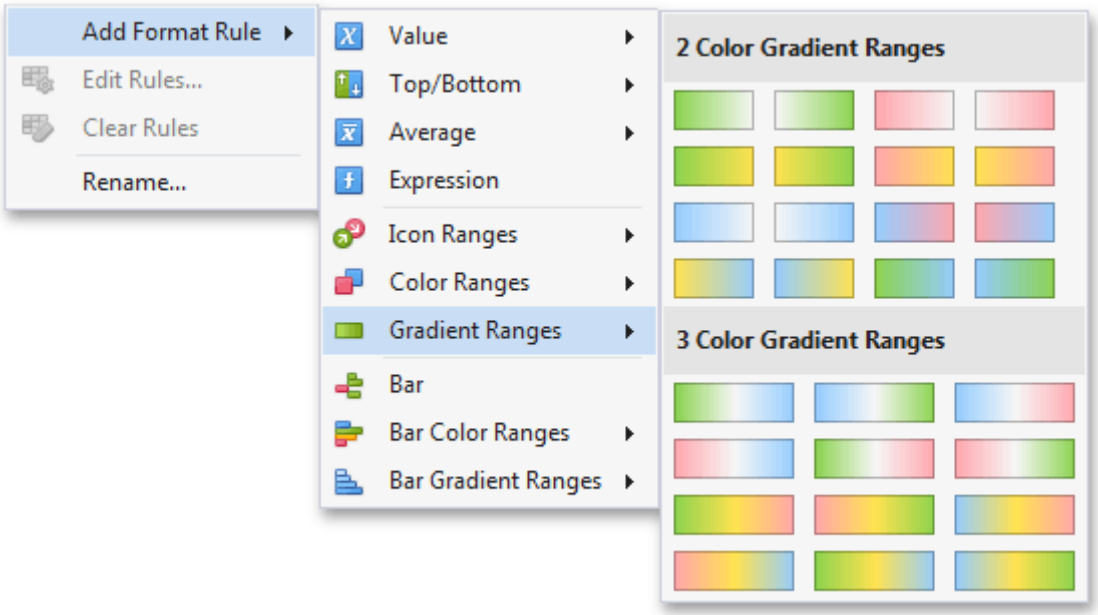
The greater or equal sign includes the smallest value for the current interval while the greater sigh excludes the smallest value from the current interval and includes it in the next interval.

- Use the **Add** and **Delete** buttons to add new ranges or delete the selected range respectively.

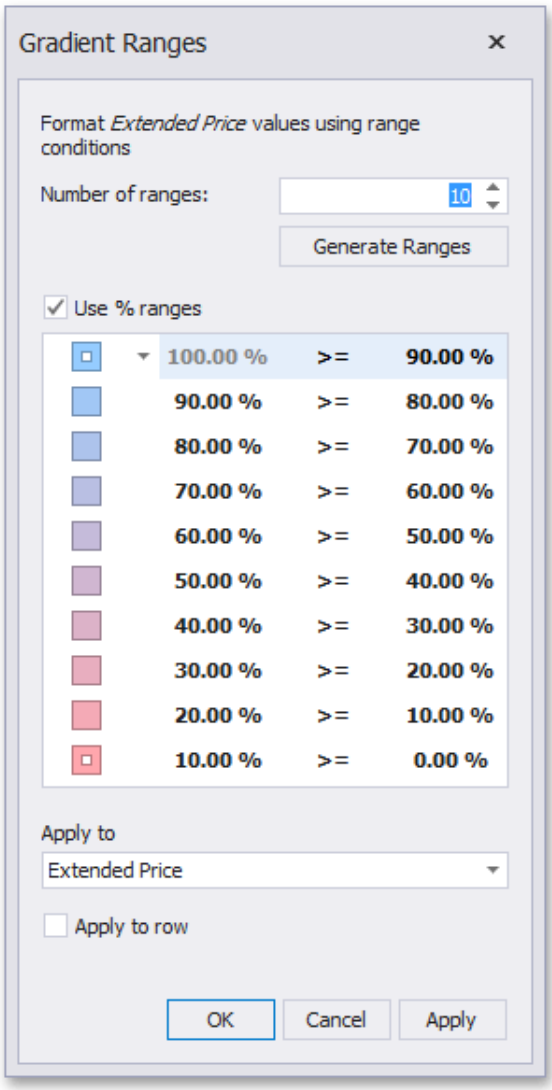
Gradient Ranges

Gradient Ranges allow you to use predefined color gradients to apply conditional formatting to different ranges of values. You can also use specific colors to generate custom gradients.

To format values according the required condition, click the measure menu button, select Add Format Rule | Color Ranges and choose the required color gradient.



This invokes the Gradient Ranges dialog containing the set of value ranges and corresponding appearance settings. The Grid dashboard item on the right displays the default formatting applied using the predefined Red- Blue gradient.



Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

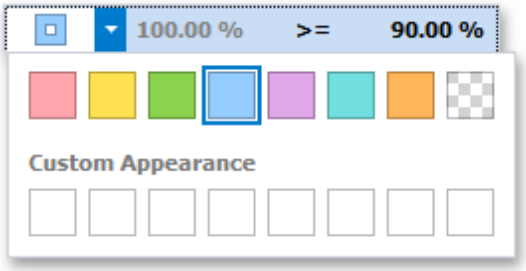
This dialog allows you to change the following options specific to Gradient Ranges.

- **Number of ranges** allows you to specify the number of ranges used to classify values. Click the **Generate Ranges** button to generate a new gradient scale according to the specified number of ranges.
- The **Use % ranges** check box specifies whether the percent or absolute scale is used to generate ranges.

Note

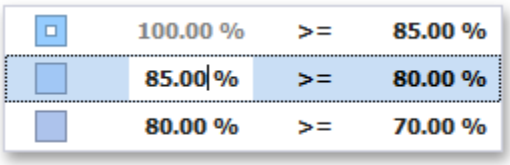
Note that this option is not available for date-time dimensions.

- To change the specific color in the gradient, click the button next to the required color and select a new color or specify a custom background color. This allows you to create a color gradient based on more than two colors. In this case, the specified colors are marked with an empty square.



To learn how to specify a custom color, see the **Specify Appearance Settings** paragraph in the Conditional Formatting topic.

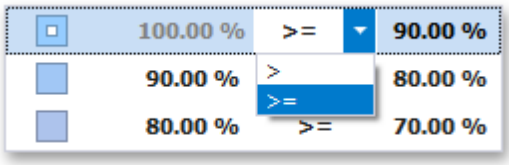
- You can change range boundaries by specifying the required values.



Note

Note that a new value should fall into a range between corresponding values of the previous and next range.

- To change the comparison logic for the required range, click the comparison sign and select the required option.

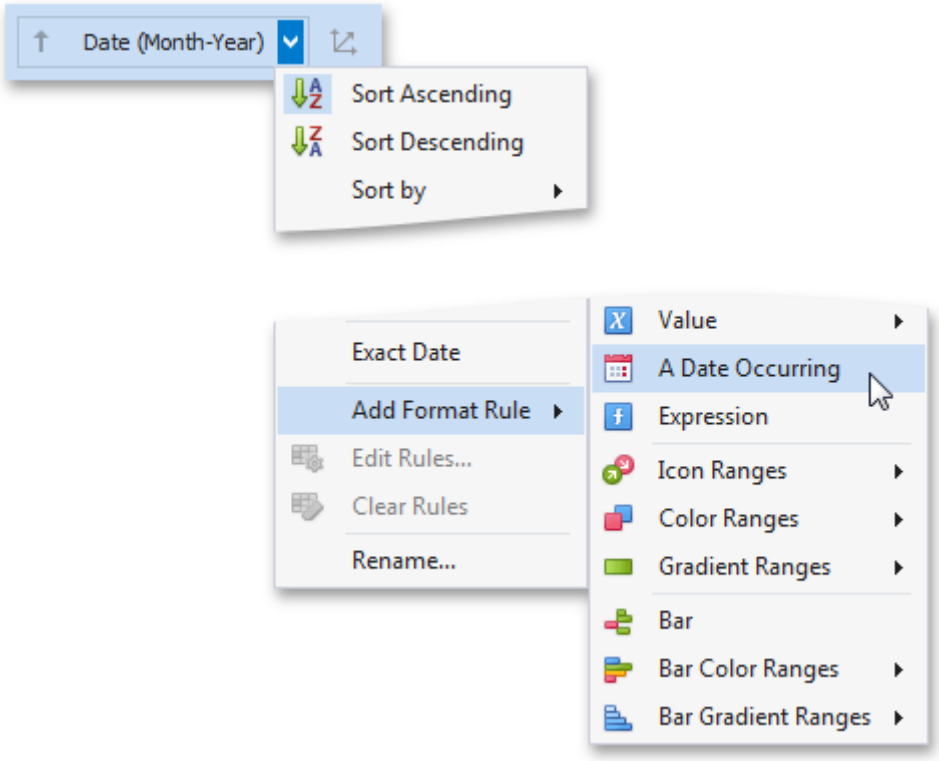


The greater or equ al sign includes the smallest value in the current interval while the greater sigh excludes the smallest value from the current interval and includes it in the next interval.

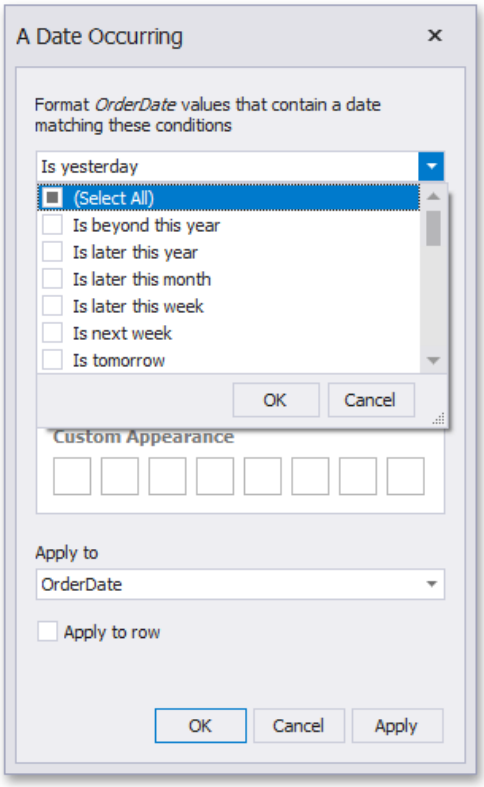
A Date Occurring

A Date Occurring format condition allows you to highlight date-time values that fall into a specified interval. Note that this format condition can be applied to dimensions with the continuous date-time group interval.

To format values according the Date Occurring condition, click the menu button of the required dimension and select Add Format Rule | A Date Occurring.



This invokes the A Date Occurring dialog that allows you to select a date-time interval(s) whose value should be formatted.



The following intervals are supported.

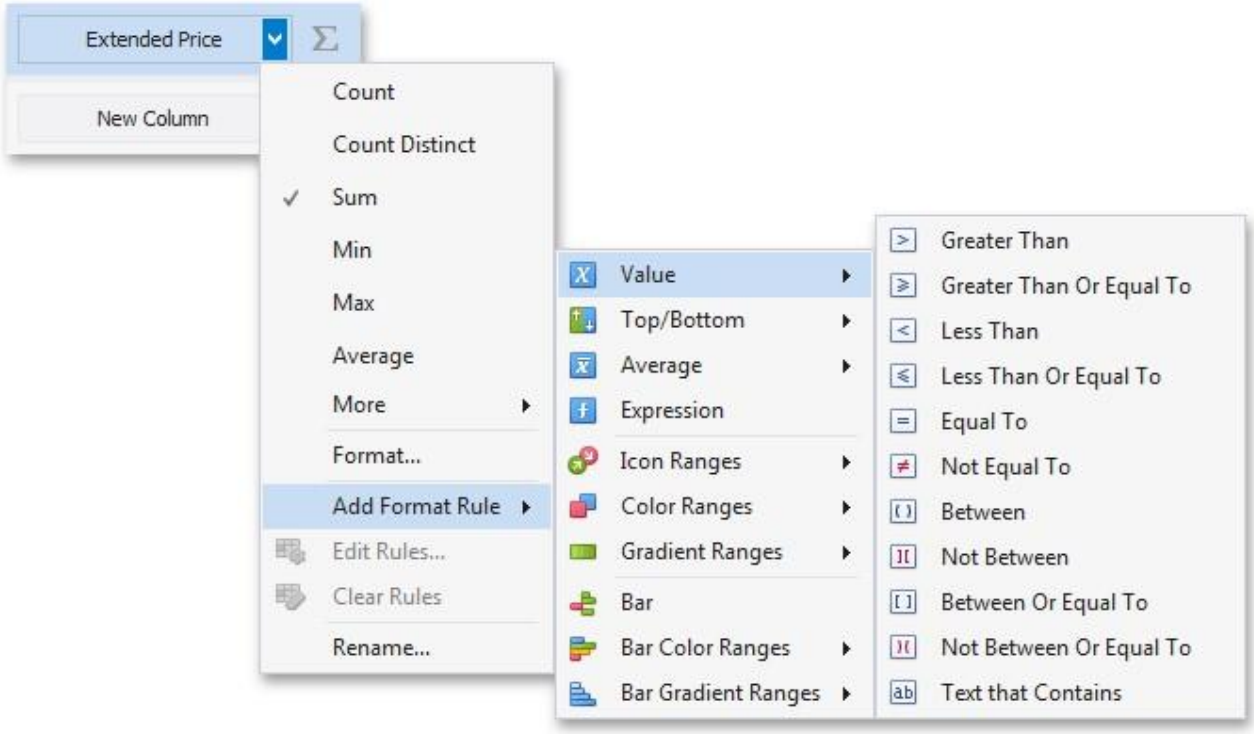
- Is beyond this year - Dates that follow the current year.
- Is later this year - Dates of the current year starting from the following month.
- Is later this month - Dates of the current month that follow the next week.
- Is later this week - Dates of the current week starting from the day after tomorrow.
- Is next week - Dates that belong to the following week.
- Is tomorrow - Tomorrow.
- Is today - Today.
- Is yesterday - Yesterday.
- Is earlier this week - Dates of the current week that are prior to yesterday.
- Is last week - Dates of the previous week.
- Is earlier this month - Dates of the current month that are prior to the previous week.
- Is earlier this year - Dates of the current year that are prior to the current month.
- Is prior to this year - Dates that are prior to the current year.
- Empty - Does not specify any condition.
- Beyond - Dates that belong to the month in three-months time and beyond.
- ThisWeek - Dates that belong to the current week.
- ThisMonth - Dates that belong to the current month.
- MonthAfter1 - Dates that belong to the following month.
- MonthAfter2 - Dates that belong to the month in two-months time.
- MonthAgo1 - Dates that belong to the previous month.
- MonthAgo2 - Dates that belong to the month two months ago.
- MonthAgo3 - Dates that belong to the month three months ago.
- MonthAgo4 - Dates that belong to the month four months ago.
- MonthAgo5 - Dates that belong to the month five months ago.
- MonthAgo6 - Dates that belong to the month six months ago.
- Earlier - Dates that belong to the month seven months ago and earlier.

Expression

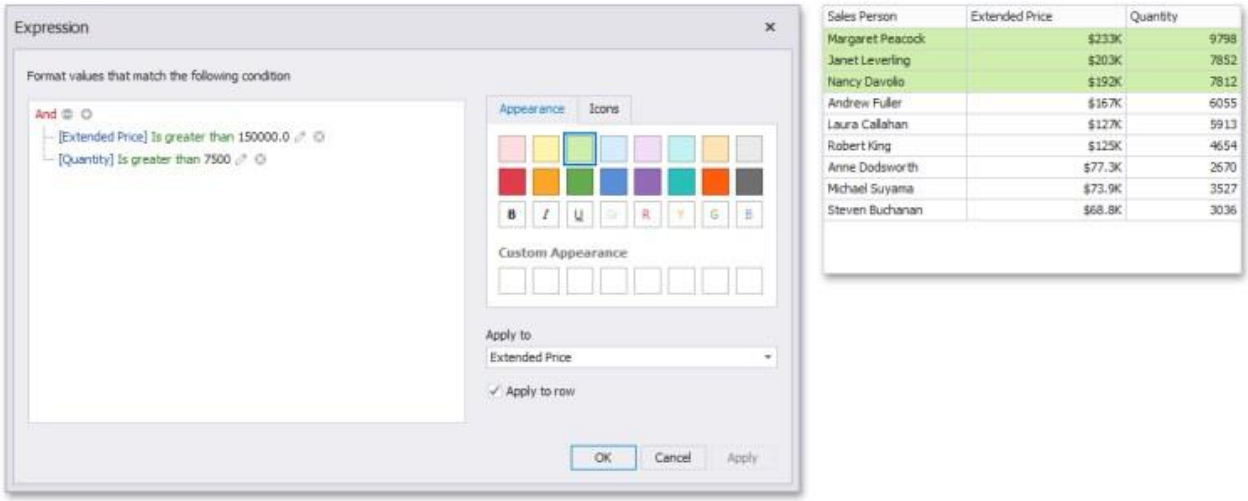
An Expression format condition allows you to use complex conditions to apply formatting.

To format values according to the Expression condition, click the menu button of the required data item and select

Add Format Rule | Expression.



This invokes the Expression dialog that allows you to specify the required expression. For instance, the following image displays a Grid dashboard item whose rows are filled in green if the Extended Price/Quantity values are greater than 150 000 and 7 500, respectively.

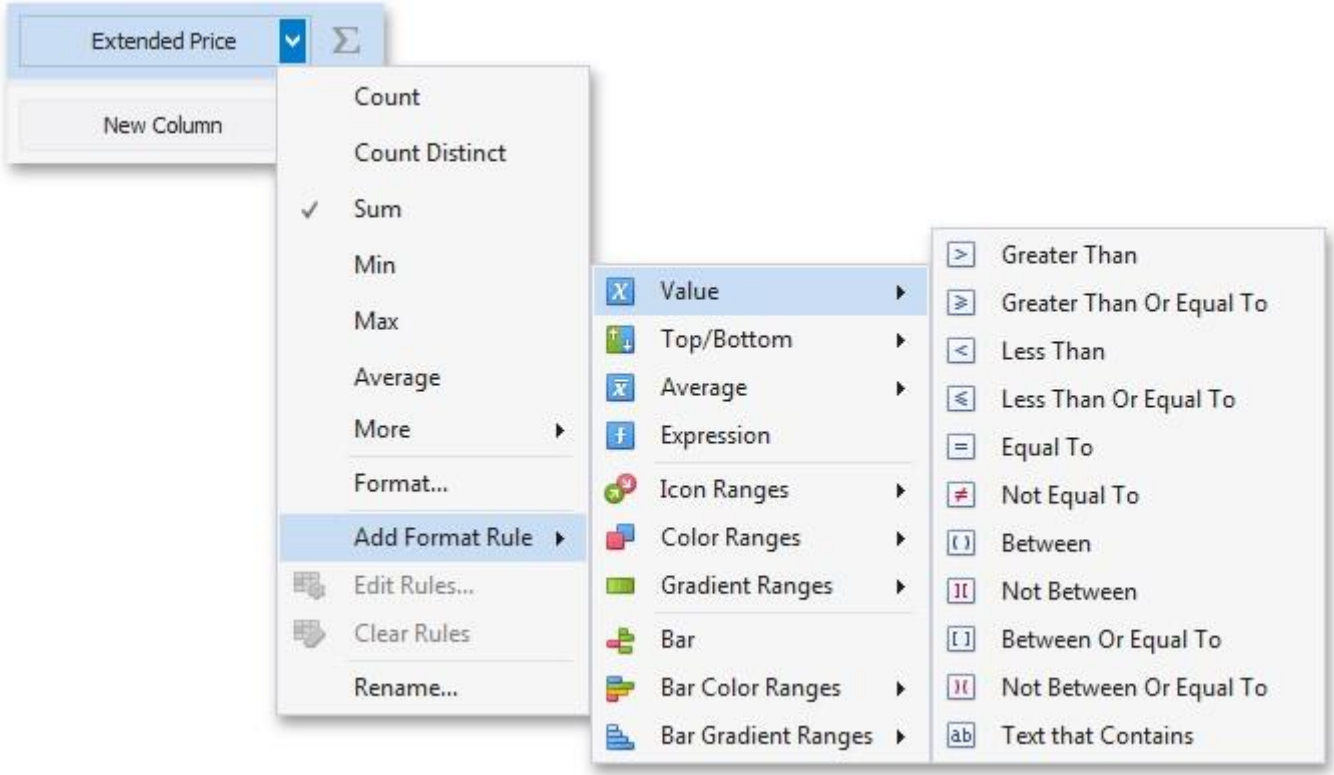


You can pass static values when creating conditions or pass a dashboard parameter to apply conditional formatting dynamically. To learn more, see Passing Parameter Values.

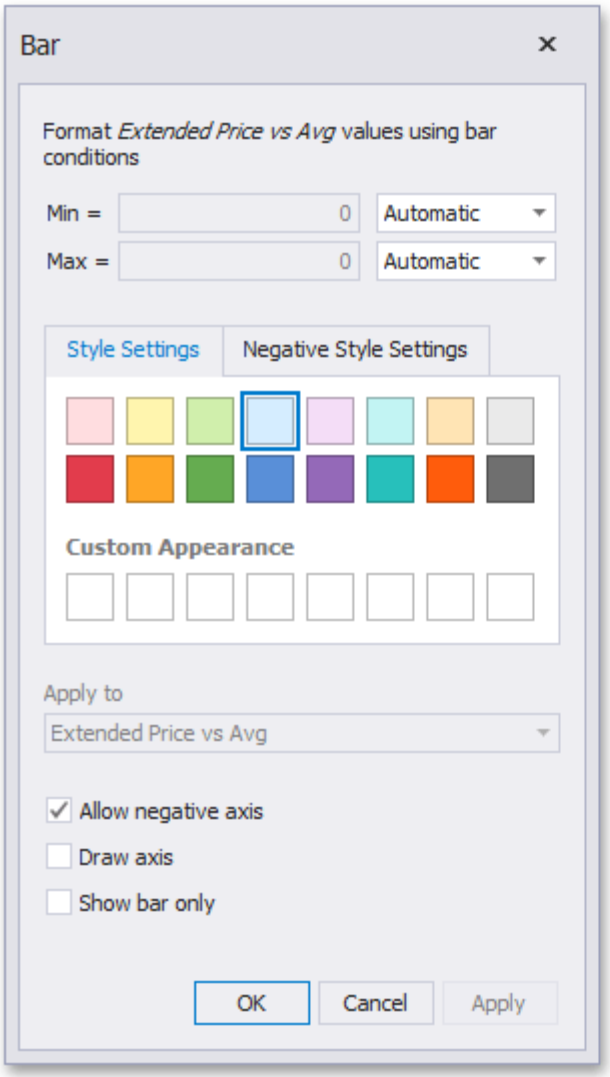
Bar

The Bar format condition allows you to visualize numeric values using bars. You can also paint bars corresponding to positive and negative values using different colors.

To format values according to the Bar condition, click the menu button of the required data item and select Add Format Rule | Bar.



This invokes the Bar dialog that allows you to specify the required settings. For instance, the following image displays a Grid dashboard item whose E xten ded Price cell contains data bars corresponding to numeric values.



Sales Person	Extended Price vs Avg
Margaret Peacock	$92.2K
Janet Leverling	$62.2K
Nancy Davolio	$51.5K
Andrew Fuller	$25.9K
Laura Callahan	($13.8K)
Robert King	($16.1K)
Anne Dodsworth	($63.3K)
Michael Suyama	($66.7K)
Steven Buchanan	($71.9K)

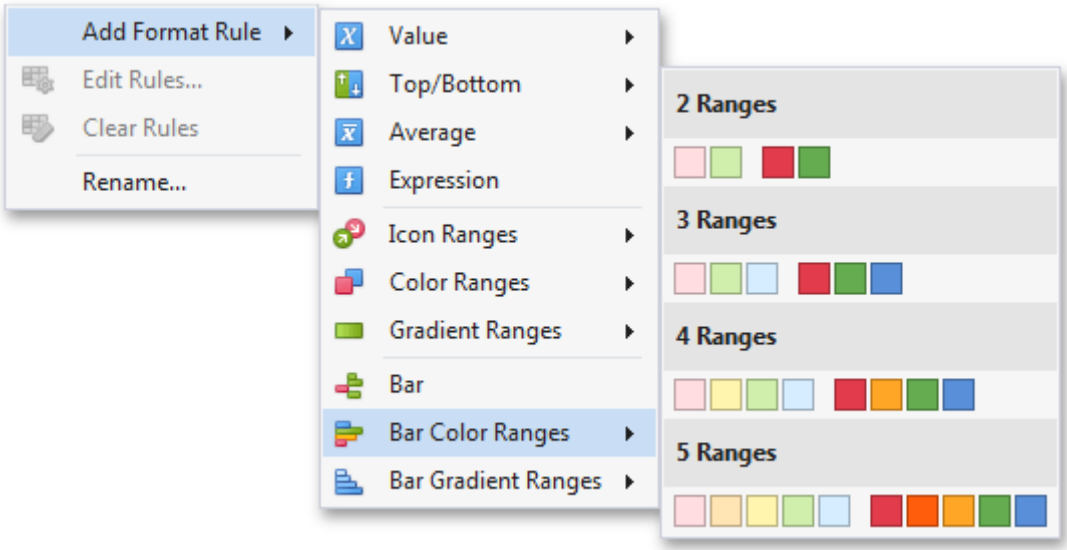
This dialog allows you to change the following options specific to the Bar format condition.

- By default, lengths of the shortest and longest bars correspond to minimum and maximum values, respectively. If necessary, you can specify values corresponding to the shortest and longest bars manually. To do this, change the type of minimum/maximum value from **Automatic** to **Number** or **Percent**, and specify the required values.
- **Style Settings** and **Negative Style Settings** allow you to specify style settings used to color data bars corresponding to positive and negative values, respectively. To learn how to specify custom style settings, see the **Specify Appearance Settings** paragraph in the Conditional Formatting topic.
- The **Allow negative axis** option allows you to specify whether negative data bars are displayed in the direction opposite to the positive data bars.
- The **Draw axis** option specifies whether to draw the vertical axis between positive and negative data bars.
- The **Show bar only** option specifies whether to show bars without corresponding values.

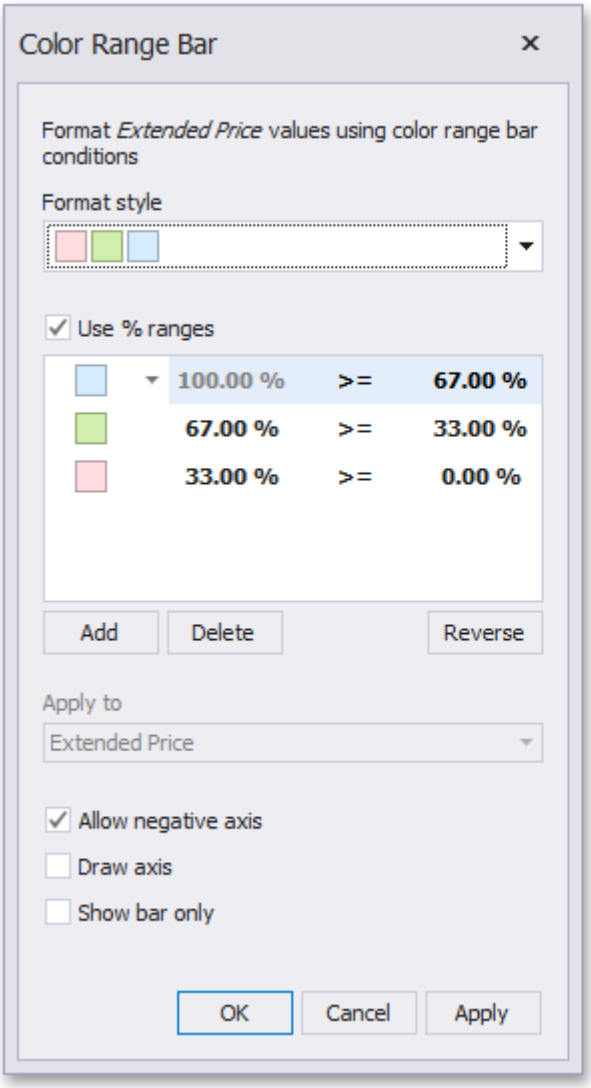
Bar Color Ranges

Bar Color Ranges allow you to visualize numeric values using bars whose colors are contained in the specified color set.

To format values according the required condition, click the data item menu button, select Add Format Rule | Bar Color Ranges and choose the required color set.



This invokes the Color Range Bar dialog containing the set of value ranges and corresponding colors. The Grid dashboard item on the right displays the default formatting applied using the predefined set of 3 colors.



Sales Person	Extended Price
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

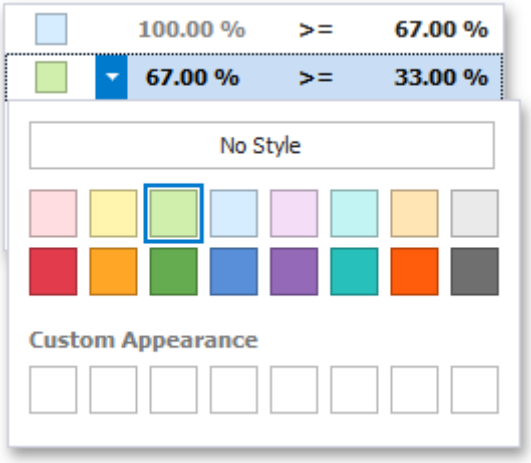
This dialog allows you to change the following options specific to Bar Color Ranges.

- The **Format Style** combo box allows you to change the color set used to apply formatting.
- The **Use % ranges** check box specifies whether the percent or absolute scale is used to generate ranges.

Note

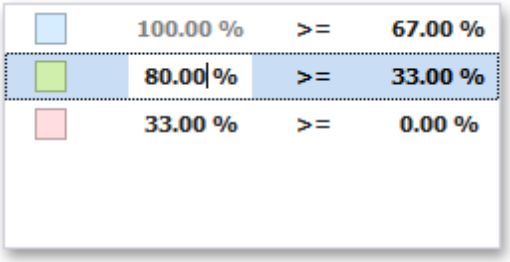
Note that this option is not available for numeric dimensions.

- To change the appearance settings applied to values corresponding to the specified range, click the button next to the required color and select a new color or specify custom appearance settings. To learn how to specify custom settings, see the **Specify Appearance Settings** paragraph in the Conditional Formatting topic.



Select **No Style** to disable the indication for the required range.

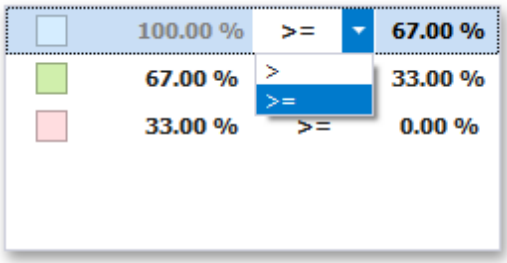
- You can change range boundaries by specifying the required values.



Note

Note that a new value should fall into a range between corresponding values of the previous and next range.

- To change the comparison logic for the required range, click the comparison sign and select the required option.



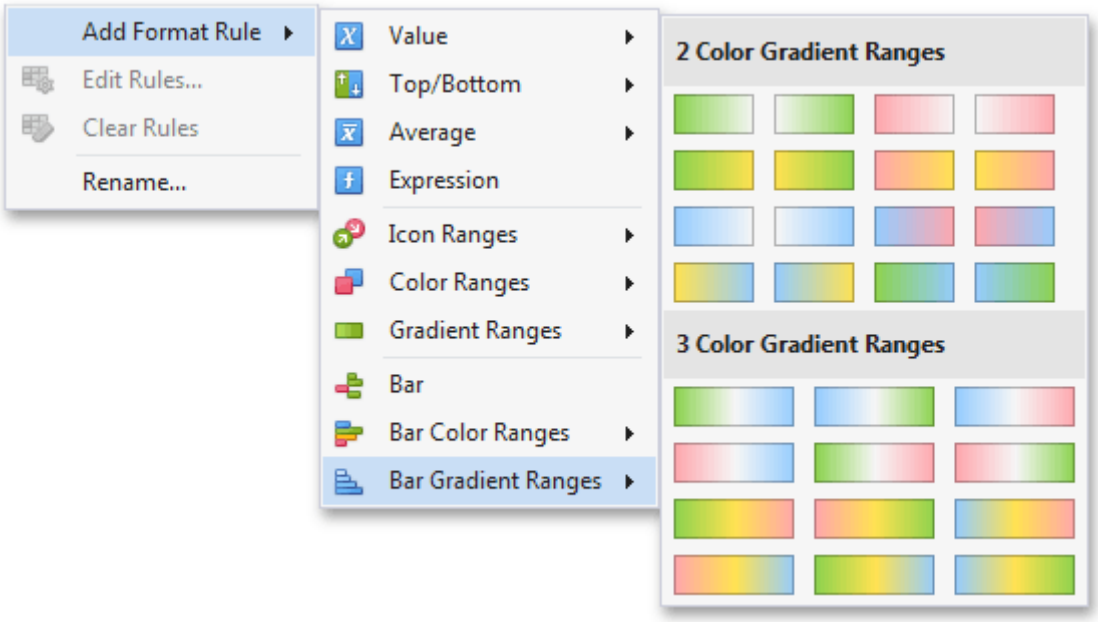
The greater or equal sign includes the smallest value for the current interval, while the greater sign excludes the smallest value from the current interval and includes it in the next interval.

- Use the **Add** and **Delete** buttons to add new ranges or delete the selected range respectively.

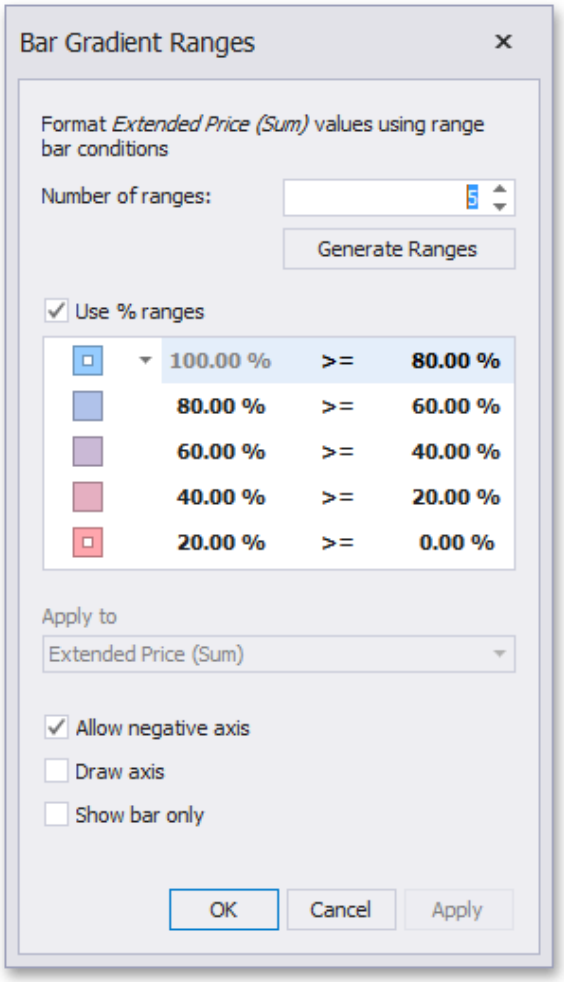
Bar Gradient Ranges

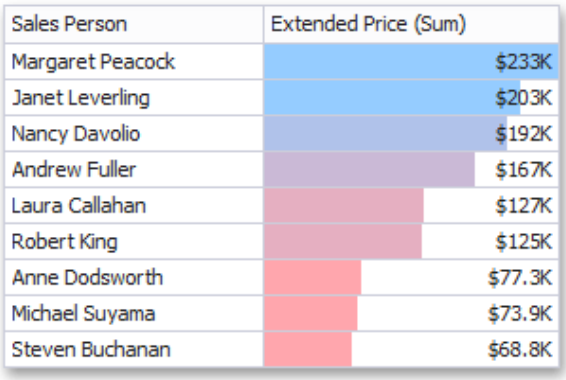
The Bar Gradient Ranges allow you to visualize numeric values using bars whose colors are contained in the specified color gradient.

To format values according the required condition, click the measure menu button, select Add Format Rule | Bar Gradient Ranges and choose the required color gradient.



This invokes the Bar Gradient Ranges dialog containing the set of value ranges and corresponding appearance settings. The Grid dashboard item on the right displays the default formatting applied using the predefined Red- Blue gradient.





Sales Person	Extended Price (Sum)
Margaret Peacock	$233K
Janet Leverling	$203K
Nancy Davolio	$192K
Andrew Fuller	$167K
Laura Callahan	$127K
Robert King	$125K
Anne Dodsworth	$77.3K
Michael Suyama	$73.9K
Steven Buchanan	$68.8K

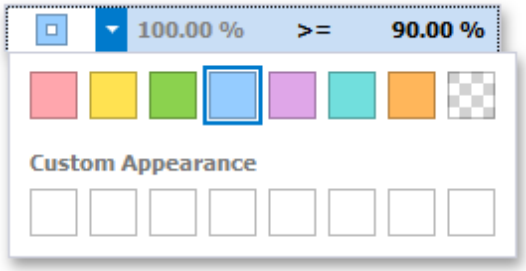
This dialog allows you to change the following options specific to Bar Gradient Ranges.

- **Number of ranges** allows you to specify the number of ranges used to classify values. Click the **Generate Ranges** button to generate a new gradient scale according to the specified number of ranges.
- The **Use % ranges** check box specifies whether the percent or absolute scale is used to generate ranges.

Note

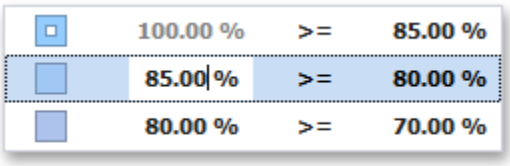
Note that this option is not available for numeric dimensions.

- To change the specific color in the gradient, click the button next to the required color and select a new color or specify a custom background color. This allows you to create a color gradient based on more than two colors. In this case, the specified colors are marked with an empty square.



To learn how to specify a custom color, see the Specify Appearance Settings paragraph in the Conditional Formatting topic.

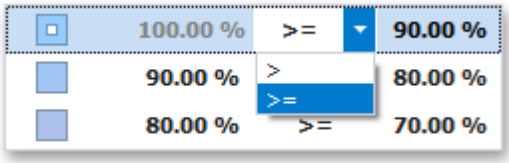
- You can change range boundaries by specifying the required values.



Note

Note that a new value should fall into a range between corresponding values of the previous and next range.

- To change the comparison logic for the required range, click the comparison sign and select the required option.



The greater or equ al sign includes the smallest value in the current interval while the greater sign excludes the smallest value from the current interval and includes it in the next interval.

Coloring

The Dashboard Designer provides the capability to manage coloring of dashboard item elements. You can choose whether to use a global color scheme providing consistent colors for identical values across the dashboard or a local color scheme that provides an independent set of colors for each dashboard item. The Dashboard Designer also allows you to edit colors automatically assigned from the default palette.

The section contains the following topics.

- Coloring Concepts
- Customizing a Color Scheme

Coloring Concepts

The Dashboard Designer provides you with the capability to color dashboard item elements by associating dimension values/measures and specified colors. You can choose whether to use a global color scheme to provide consistent colors for identical values or specify a local color scheme for each dashboard item.

- Supported Dashboard
- Items Color Schemes
- Coloring Dimensions and Measures

Supported Dashboard Items

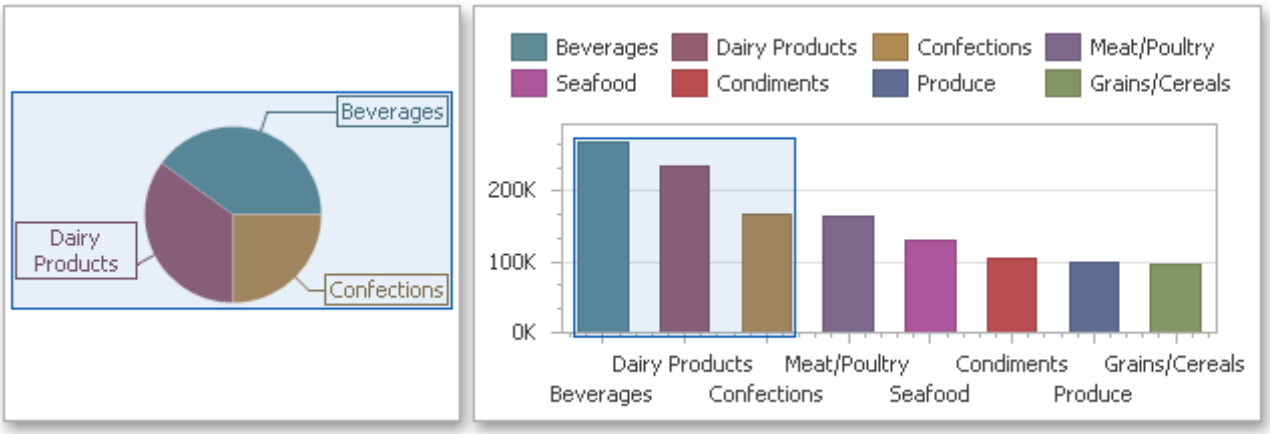
The BI Dashboard allows you to manage coloring for the following dashboard items.

- Chart
- Scatter
- Chart
  Pie
- Pie Map
- Range
- Filter
  Treemap

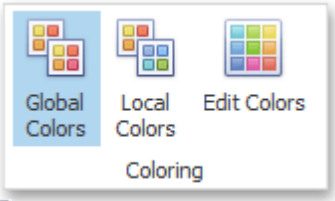
Color Schemes

The dashboard provides two ways of coloring dashboard item elements.

- Using a global color scheme that provides consistent colors for identical values across the dashboard. The image below shows the dashboard containing Pie and Chart dashboard items. Pie segments and chart series points corresponding to 'Beverages', 'Condiments' and 'Diary Products' dimension values are colored using identical colors from the default palette.



To use global colors for coloring dashboard item elements, click the **Global Colors** button in the **Design** ribbon tab.

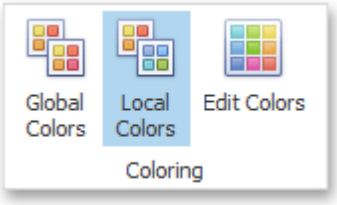


Important

When a global color scheme is used, the dashboard reserves automatically generated colors for certain values regardless of the filter state.

Using a local color scheme that provides an independent set of colors for each dashboard item.

To use local colors for coloring dashboard item elements, click **Local Colors** in the **Design** ribbon tab.



Important

When a local color scheme is used, the dashboard reassigns palette colors when the filter state is changed.

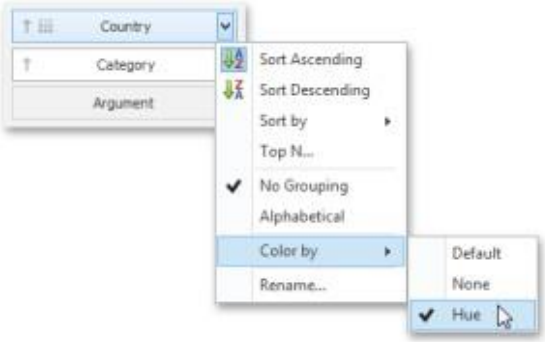
Coloring Dimensions and Measures

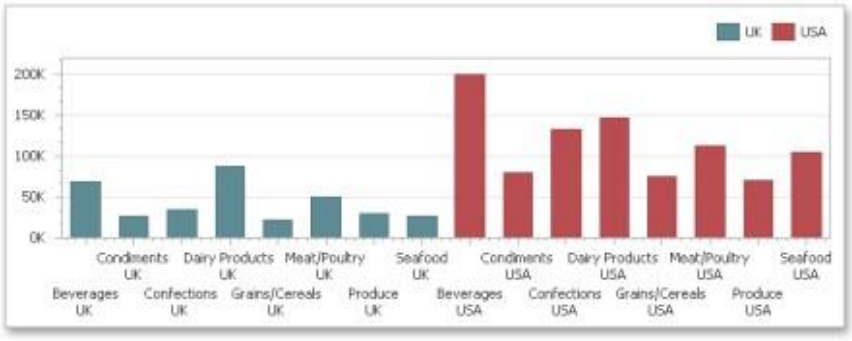
Dashboard items allow you to manage the coloring of individual dimensions or all dashboard item measures using predefined coloring modes.

Coloring Mode	Description
Default	Dimension values/measures are colored by default. To learn how specific dashboard items color their elements by default, see the **Coloring** topic for the corresponding dashboard item.
Hue	Dimension values/measures are colored by hue. If coloring by hue is enabled, a data item indicates this using the indicator.
None	Dimension values/measures are colored with the same color.

Coloring Dimension Values

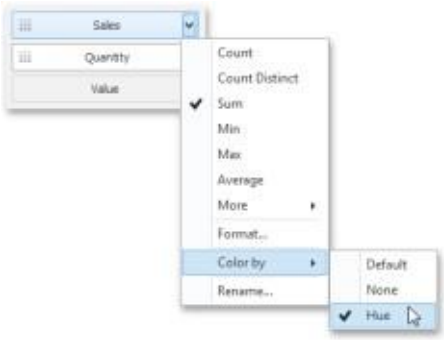
To specify the coloring mode for the required dimension, click the dimension's menu button and use the Color by submenu. For instance, the image below shows the Chart dashboard item whose 'Country' dimension is colored by hue.





Coloring Measures

To specify the coloring mode for dashboard item measures, click the menu button of any measure and use the Color by submenu. For instance, the image below shows the Pie dashboard item whose measures are colored by hue.



If you enabled coloring by hue for several dimensions/measures, all combinations of dimension values/measures will be automatically colored using different colors from the default palette. To learn how to customize these colors, see Customizing a Color Scheme.

Customizing a Color Scheme

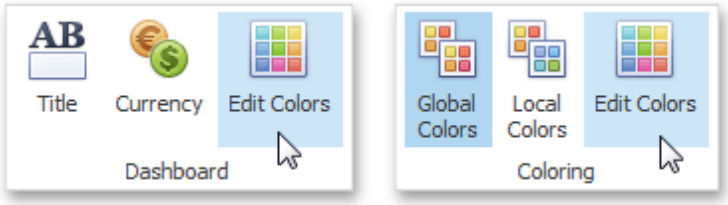
The Dashboard Designer provides the capability to edit colors contained in global and local color schemes. You can select the required color from the default dashboard palette or specify a custom color.

- Invoke a Color Scheme
- Dialog Edit Colors
- Add a New Value
- Add a New Color Table

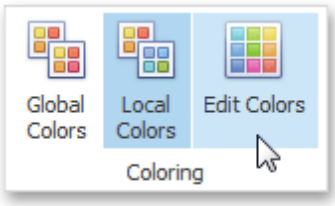
Invoke a Color Scheme Dialog

To edit colors, use the **Color Scheme** dialog. You can invoke this dialog in the following ways.

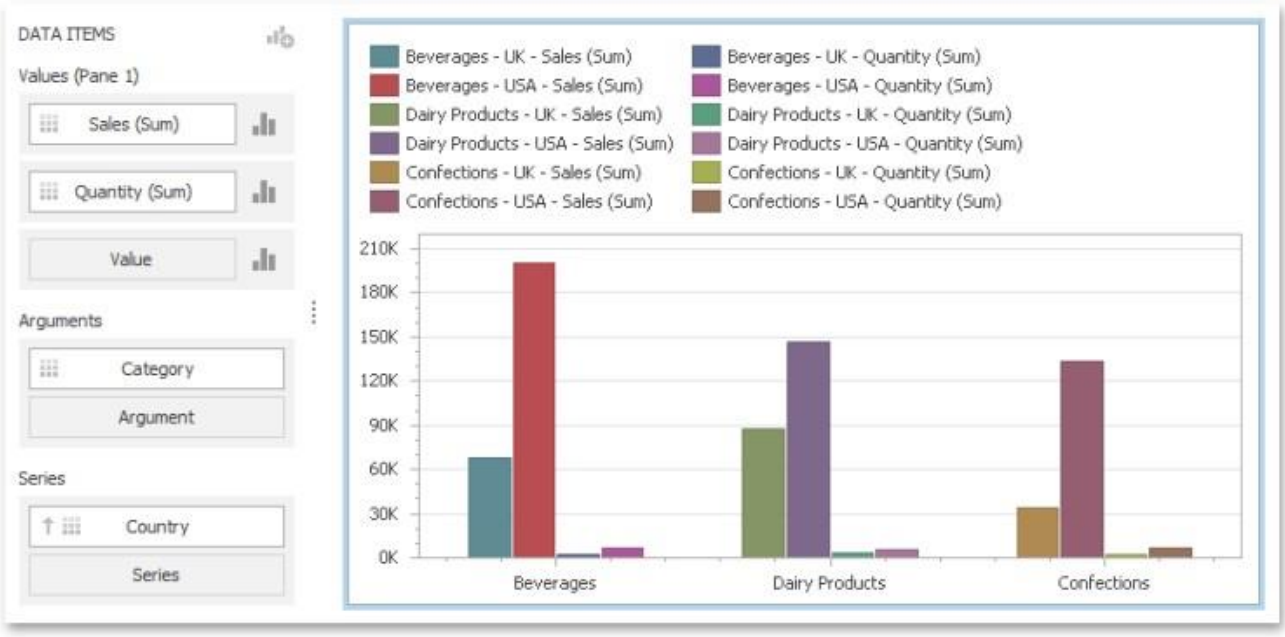
- To edit colors in a global color scheme, use the **Edit Colors** button in the **Home** ribbon tab or the **Edit Colors** button in the dashboard item's **Design** tab.



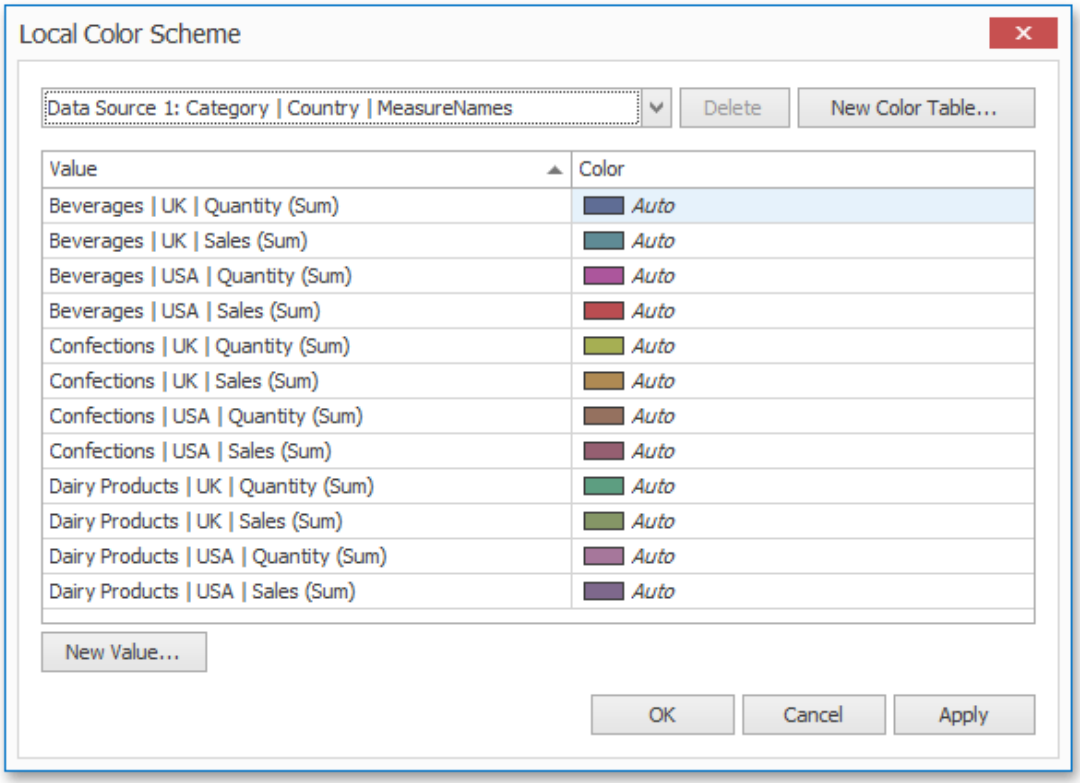
- To edit colors in a local color scheme, use the **Edit Colors** button in the contextual **Design** ribbon tab.



Lets consider a Chart dashboard item whose dimensions and measures are colored by hue using local colors.



For this dashboard item, the Color Scheme dialog will contain combinations of all dimension values and a specific measure.



In this dialog, you can perform the following actions.

- Edit automatically assigned colors or specify new colors.
- Add new values to a color table.

  Add new color tables containing values whose colors are not yet assigned.

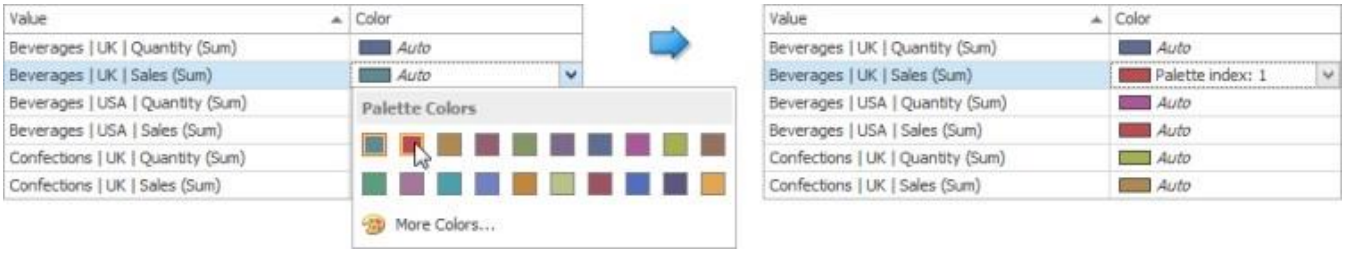
Edit Colors

You can customize automatically assigned colors in several ways.

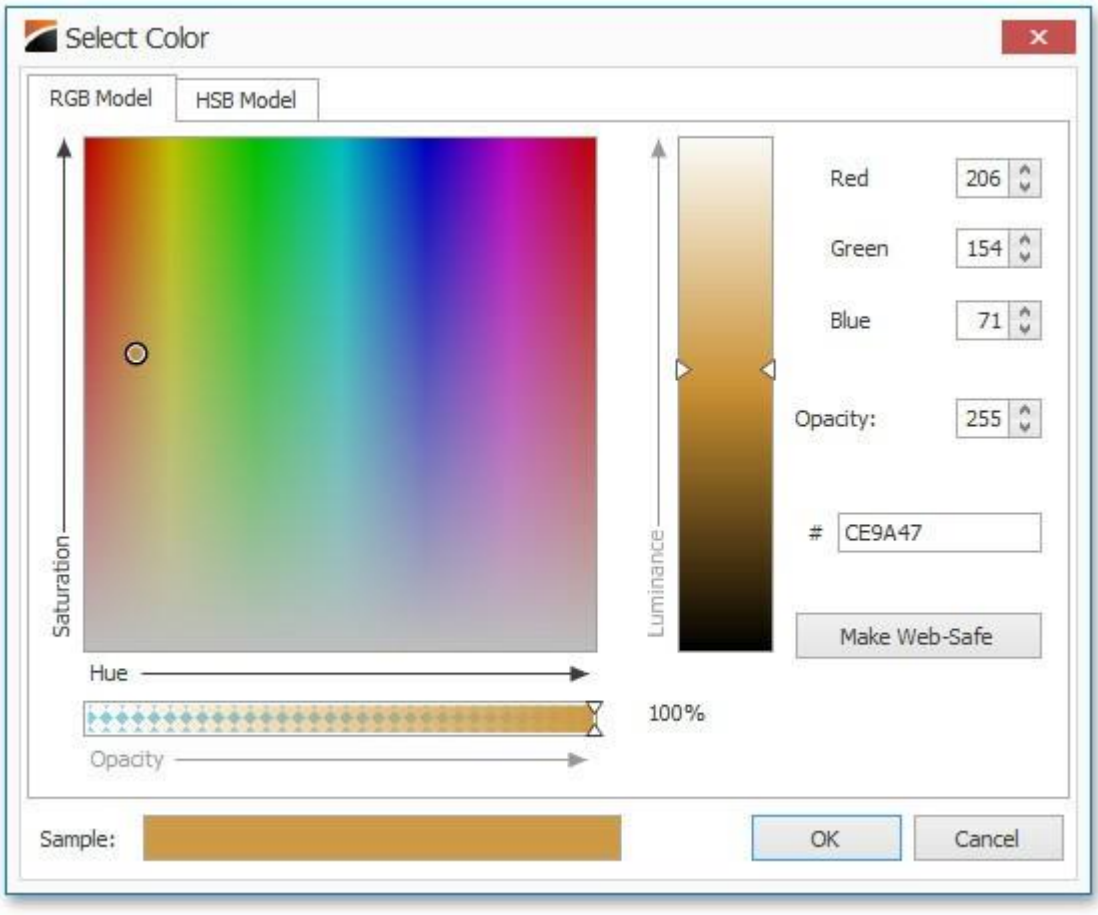
- To retain the automatically assigned color for the selected value, right-click the required value in the **Value** column and select **Retain this color**.

This reserves the current palette color for the selected value.

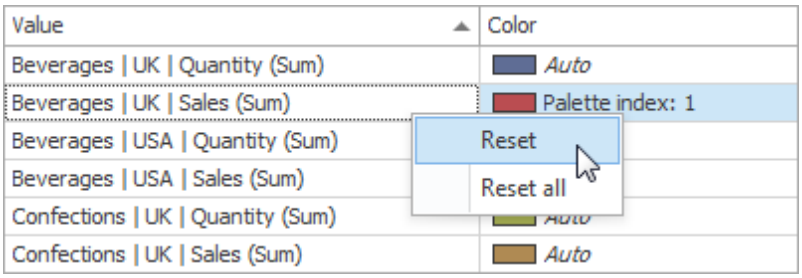
- You can select another palette color by clicking the required cell in the **Color** column.



- To specify a custom color, click **More Colors...** and pick any color using the RGB or HSB color model in the invoked **Select Color** dialog.

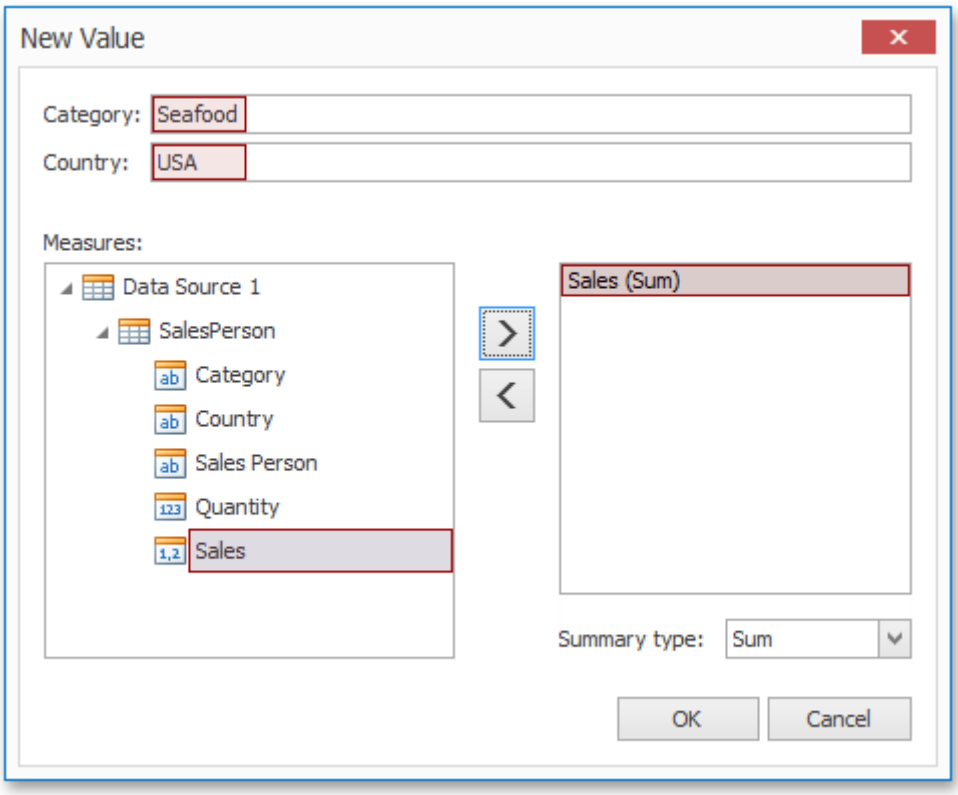


You can reset the customized color for the selected value using the **Reset** menu item.



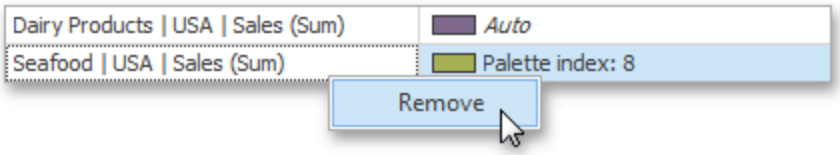
Add a New Value

The **Color Scheme** dialog allows you adding a new value with the specified color to the selected color table. To do this, click the **New Value...** button.



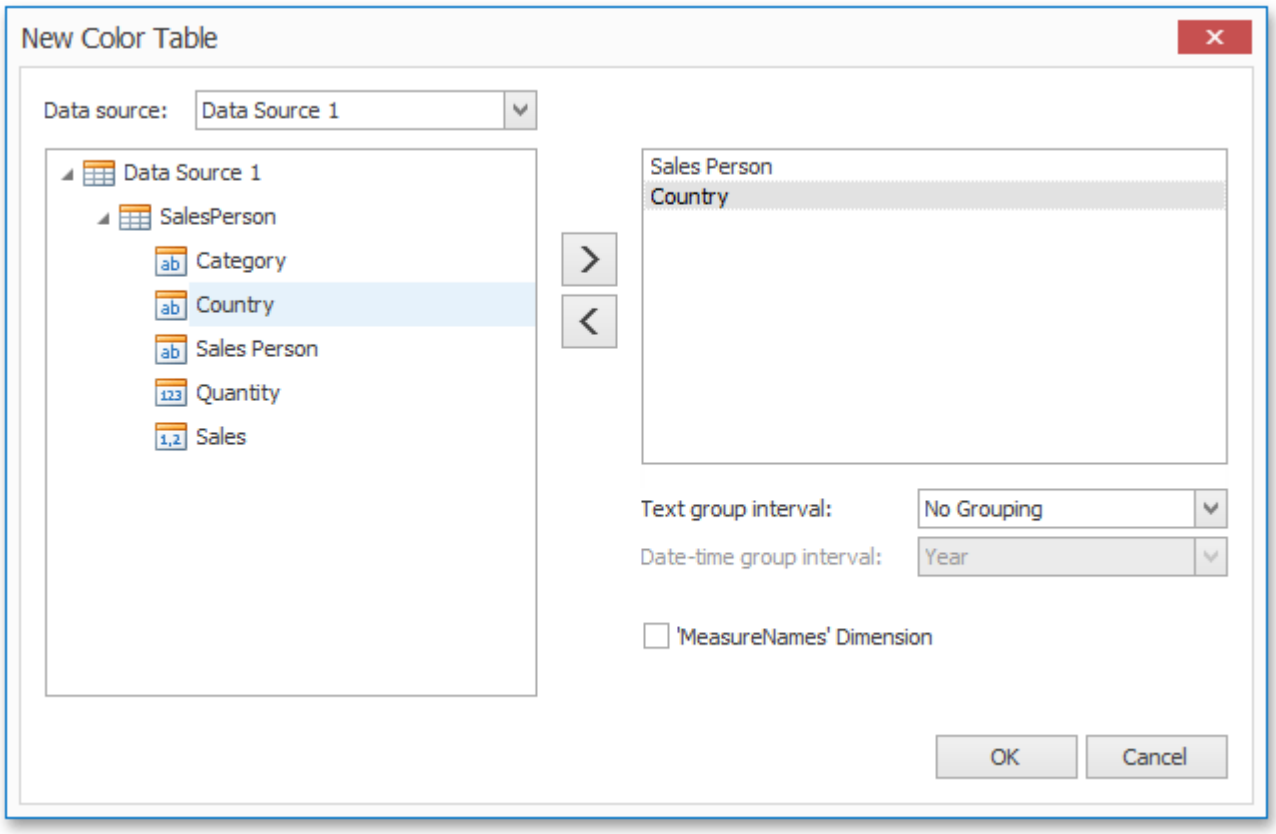
In the invoked **New Value** dialog, specify the dimension values, add the required measures and click **OK**. This creates a new value whose color can be specified as described in Edit Colors.

You can remove manually added values using the **Remove** context menu item.



Add a New Color Table

The **Color Scheme** dialog also allows you to add a new color table containing values whose colors are not yet assigned. To do this, click **New Color Table...** button.



In the invoked dialog, specify the data source, add the required dimensions and enable the **'MeasureNames' Dimension** check-box if you need to add measures to a color table.

Click **OK** to add the color table to a color scheme. Then, you can add values to this table (see Add a New Value) and specify its colors (see Edit Colors).

Data Analysis

This section describes how to perform advanced data analysis using the aggregate and window functions, dashboard parameters, etc.

The section consists of the following topics.

- Aggregations
- Window Calculations
- Using Dashboard Parameters

Aggregations

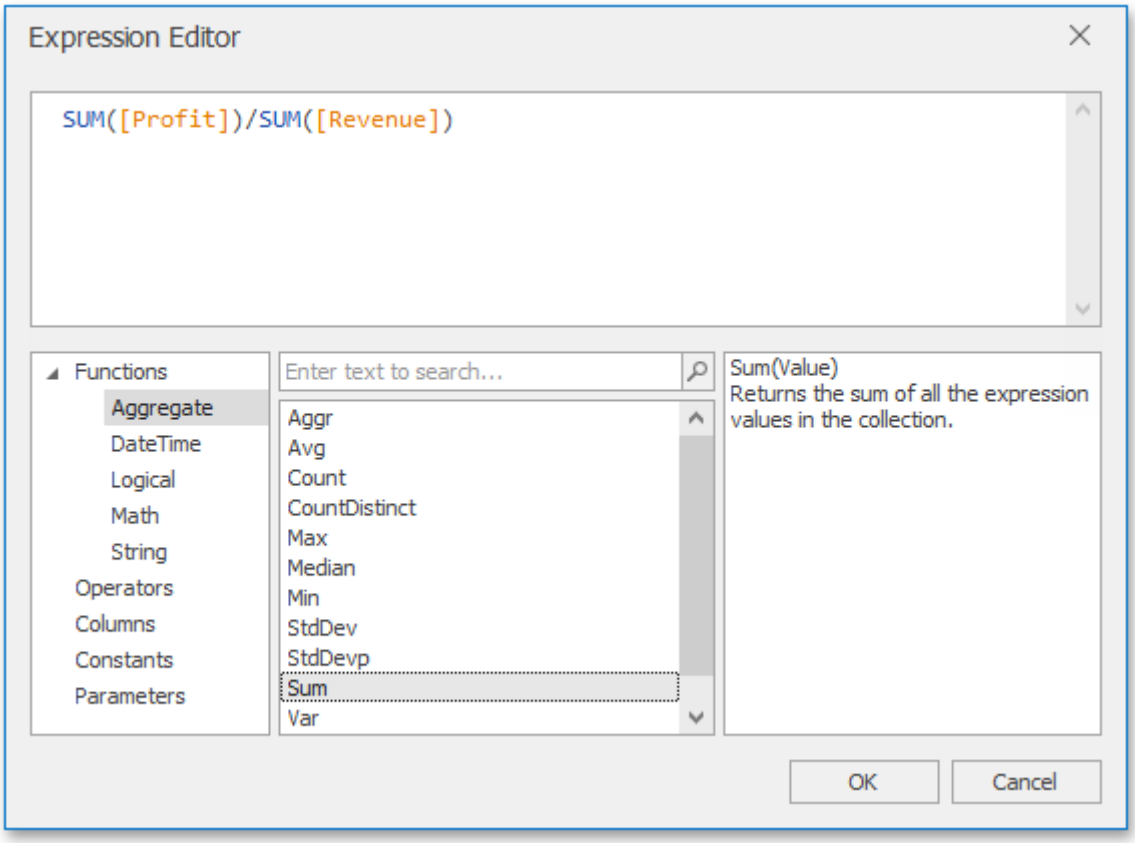
Topics in this section describe functions used to introduce additional aggregation levels to prepare underlying data.

- Summary Level Aggregations
- Intermediate Level Aggregations

Summary Level Aggregations

The BI Dashboard Designer allows you to perform aggregations when constructing a calculated field expression. This allows you to evaluate calculated fields on a summary level.

In the BI Dashboard Designer, you can use the following set of predefined aggregate functions.



Function	Description
Aggr(SummaryExpression, Dimensions)	Aggregates underlying data using the detail level specified by a predefined set of dimensions and a specified summary function. To learn more, see Intermediate Level Aggregations.
Avg(Value)	Returns the average of all the values in the expression.
Count()	Returns the number of values.
CountDistinct(Value)	Returns the number of distinct values.
Max(Value)	Returns the maximum value across all records.
Min(Value)	Returns the minimum value across all records.
Median(Value)	Returns the median of the values.
Sum(Value)	Returns the sum of all values.
Var(Value)	Returns an estimate of the variance of a population where the sample is a subset of the entire

	population.
Varp(Value)	Returns the variance of a population where the population is the entire data to be summarized.
StdDev(Value)	Returns an estimate of the standard deviation of a population where the sample is a subset of the entire population.
StdDevp(Value)	Returns the standard deviation of a population where the population is the entire data to be summarized.

These functions can be used for all types of numeric fields

Intermediate Level Aggregations

The Dashboard can aggregate and summarize data on different levels.

- The Query Builder allows you to prepare an underlying data source before analyzing data. You can apply grouping, sorting, summarization and other data shaping operations during data selection.
- Dashboard items aggregate and summarize data at a visualization level using dimensions and measures, respectively. To learn more, see Binding Dashboard Items to Data.
- The **Aggr** function allows you to introduce an intermediate detail level that is not related to the visualization level. This allows you to create custom aggregations at different levels and combine these aggregations with existing visualizations.

Overview

The **Aggr** function aggregates and summarizes underlying data using the detail level specified by a predefined set of dimensions and a specified summary function. This function can be used during the creation of a new calculated field in the Expression Editor.

The **Aggr** function has the following syntax.

C#

```
Aggr(summaryExpression, dimension1, dimension2, ...)
```

The first argument is a summary expression calculated against a specific data source field. The next arguments are the set of dimensions whose values are aggregated and used to calculate summaries specified using the first argument. For instance, the following function calculates sums of sales for each product within the specified category.

C#

```
Aggr(Sum([Sales]), [Category], [Product])
```

If you created the calculated field that includes the **Aggr** function and dropped the created field into an existing dashboard item, the Dashboard joins the resulting aggregation with the already displayed data. This means that you can add data with the increased or decreased granularity to the dashboard item. There are two main scenarios.

- In the first scenario, an aggregation has a **less detailed granularity** than visualized data.

  In this scenario, an underlying data source contains the list of orders for two categories and corresponding products.

Order ID	Category	Product	Sales
1	Beverages	Chai	10
2	Beverages	Chai	15
3	Beverages	Coffee	35
4	Beverages	Coffee	20
5	Confections	Chocolate	40
6	Confections	Chocolate	55
7	Confections	Biscuits	25
8	Confections	Biscuits	35

  To aggregate this data by individual categories, create a calculated field with the following expression.

  C#

```
Aggr(Sum([Sales]), [Category])
```

  The following internal table will be generated for this calculated field.

Order ID	Category	Product	Sales
1	Beverages	Chai	10
2	Beverages	Chai	15
3	Beverages	Coffee	35
4	Beverages	Coffee	20
5	Confections	Chocolate	40
6	Confections	Chocolate	55
7	Confections	Biscuits	25
8	Confections	Biscuits	35

Beverages	80
Confections	155

The sample Grid dashboard item contains more detailed data and includes the following columns: Category

, Produ ct and the sum of Sales.

Category	Product	Sales (Sum)
Beverages	Chai	$25
Beverages	Coffee	$55
Confections	Biscuits	$60
Confections	Chocolate	$95

If you drop the created calculated field to the Grid, the sum of sales for each category will be repeated for each Grid row.

Category	Product	Sales (Sum)
Beverages	Chai	$25
Beverages	Coffee	$55
Confections	Biscuits	$60
Confections	Chocolate	$95

Beverages	80
Confections	155

Category	Product	Sales (Sum)	Sales by Category (Sum)
Beverages	Chai	$25	$80
Beverages	Coffee	$55	$80
Confections	Biscuits	$60	$155
Confections	Chocolate	$95	$155

For instance, you can use these values later to calculate a contribution of each product to a categorys sales.

- An aggregation has a **more detailed granularity** than visualized data.

To aggregate this data by categories and products, create a calculated field with the following expression.

C#

```
Aggr(Sum([Sales]), [Category], [Product])
```

The following internal table will be generated for this calculated field.

Order ID	Category	Product	Sales
1	Beverages	Chai	10
2	Beverages	Chai	15
3	Beverages	Coffee	35
4	Beverages	Coffee	20
5	Confections	Chocolate	40
6	Confections	Chocolate	55
7	Confections	Biscuits	25
8	Confections	Biscuits	35

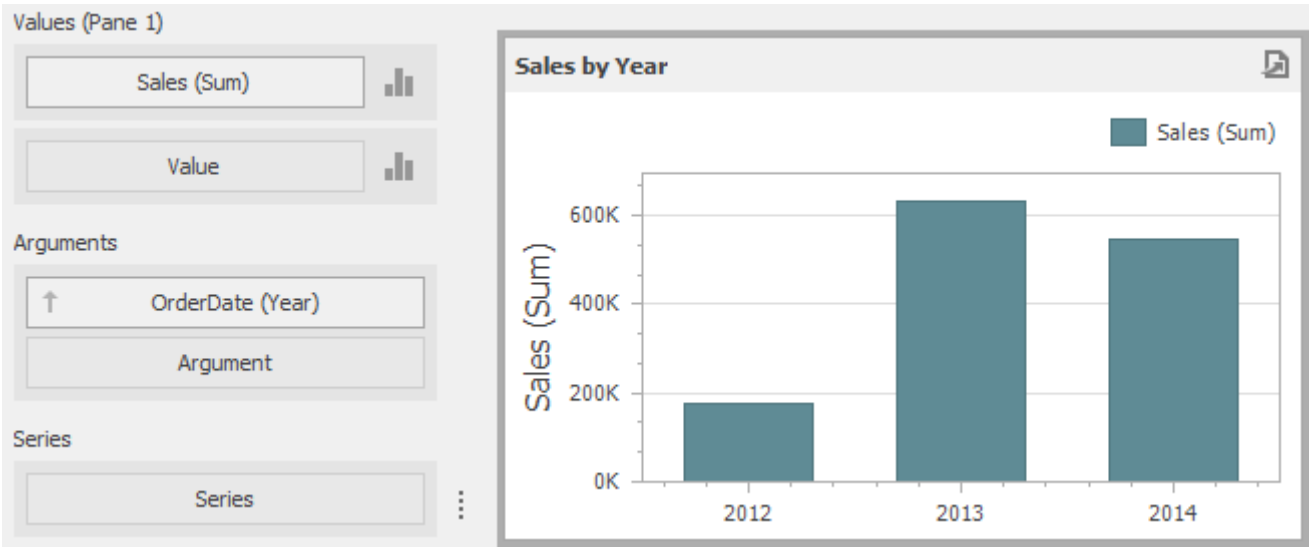
Beverages	Chai	25
Beverages	Coffee	55
Confections	Biscuits	60
Confections	Chocolate	95

Drop the created calculated field to the Grid and set its summary type to **Min**. The Grid will display minimum product sales within each category.

Example 1 - Best/Worst Sales by Year

The following example shows how to display best and worst monthly sales for each year.

In this example, the Chart dashboard item shows the sum of sales by different years. The Sales field is placed in the Values section and the OrderDate (with the **Year** group interval) is placed in the Arguments section.

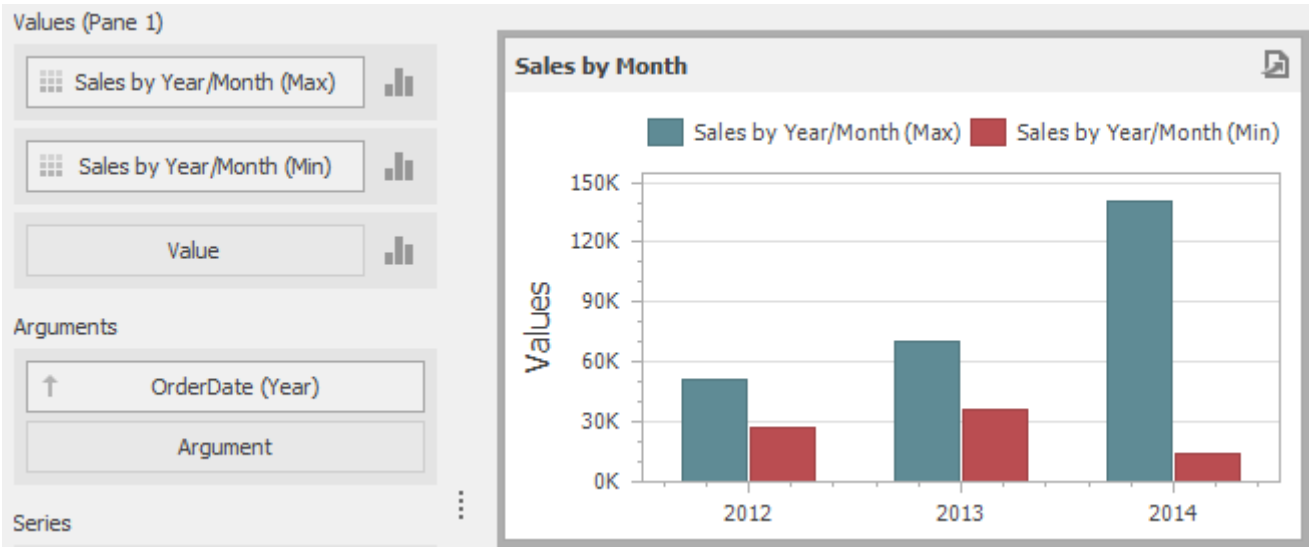


To display sales by the best/worst months for each year, create a new calculated field with the following expression.

C#

```
Aggr(Sum([Sales]), GetYear([OrderDate]), GetMonth([OrderDate]))
```

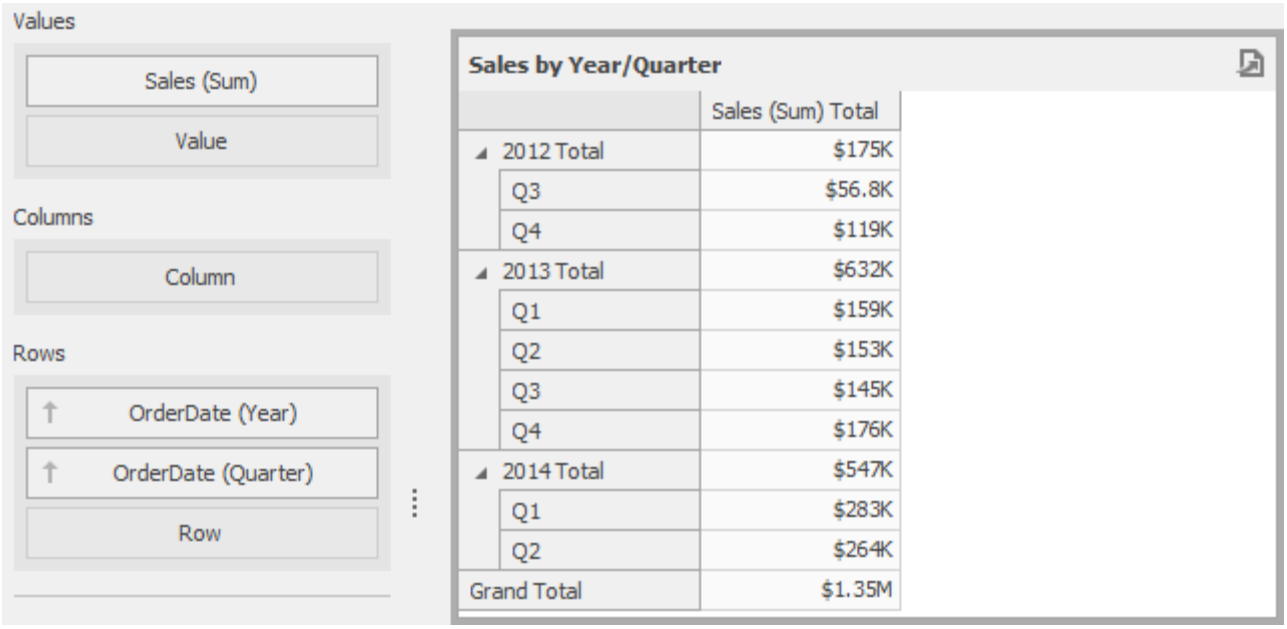
Drop this field (Sales by Year/Month in the image below) to the Values section and set its summary type to **Max**. Then, drop this field to Values again and set its summary type to **Min**. The Chart will visualize sales by the best/ worst months in a year.



Example 2 - Percent of Total

This example will demonstrate how to calculate a contribution of individual quarter sales to year sales.

In this example, the Pivot dashboard item displays the sum of sales by year/quarter. The Sales field is placed in the Values section and the hierarchy of OrderDate fields (with the **Year** and **Quarter** group intervals) is placed in Rows.



To calculate a contribution of each quarter to a year sales, do the following.

- Calculate totals for each year using the **Aggr** function by creating the following calculated field.

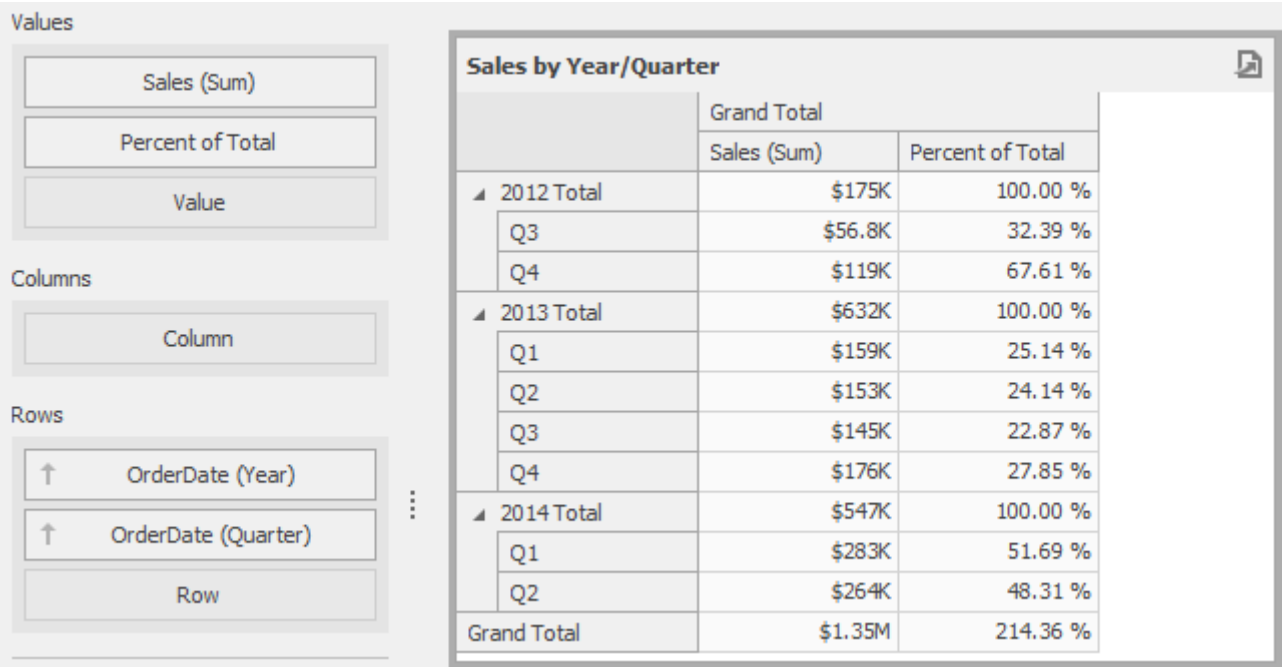
C#	
`Aggr(Sum([Sales]), GetYear([OrderDate]))`	

Set the name of the created field to Sales by Year.

- Calculate a contribution of each quarter to year sales by creating the following calculated field.

C#	
`Sum([Sales]) / Max([Sales by Year])`	

Name this field Percent of Total and drop it to **Values** to see the result.



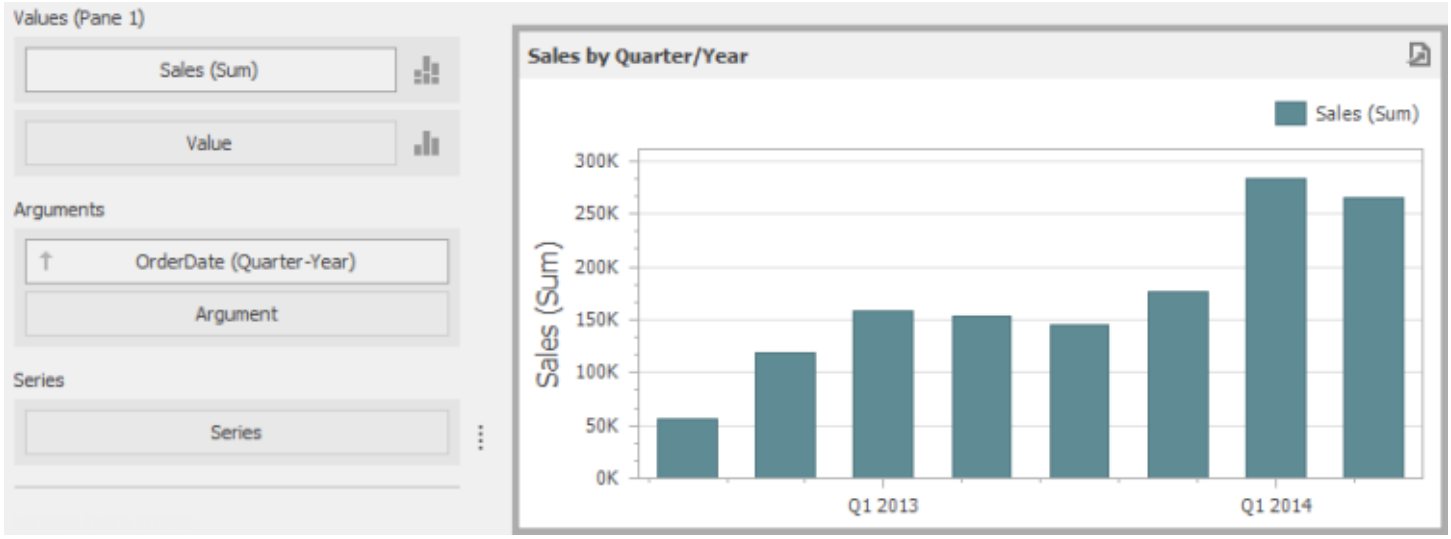
Sales by Year/Quarter

	Grand Total	
	Sales (Sum)	Percent of Total
2012 Total	$175K	100.00 %
Q3	$56.8K	32.39 %
Q4	$119K	67.61 %
2013 Total	$632K	100.00 %
Q1	$159K	25.14 %
Q2	$153K	24.14 %
Q3	$145K	22.87 %
Q4	$176K	27.85 %
2014 Total	$547K	100.00 %
Q1	$283K	51.69 %
Q2	$264K	48.31 %
Grand Total	$1.35M	214.36 %

Example 3 - Customer Acquisition

In this example, a customer acquisition will be evaluated by grouping customers by the quarter/year of their first purchase to compare sales contributions.

The Chart dashboard item below visualizes sales by quarter/year.

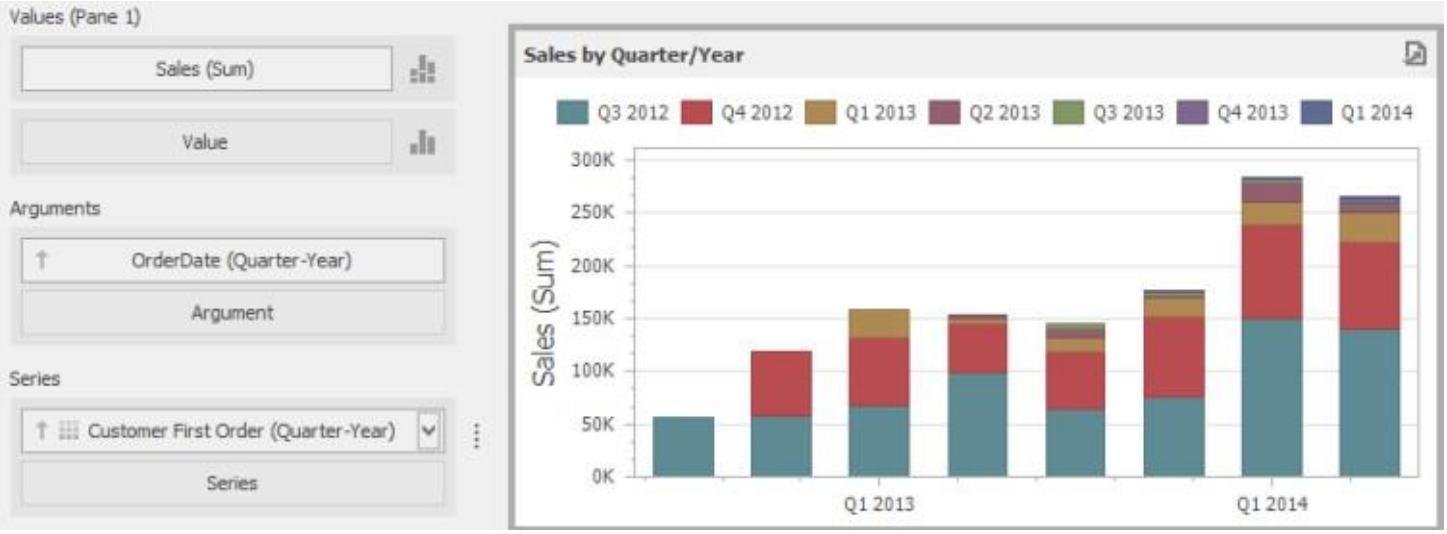


The following expression determines the minimum order date (the first purchase date) per customer.

C#

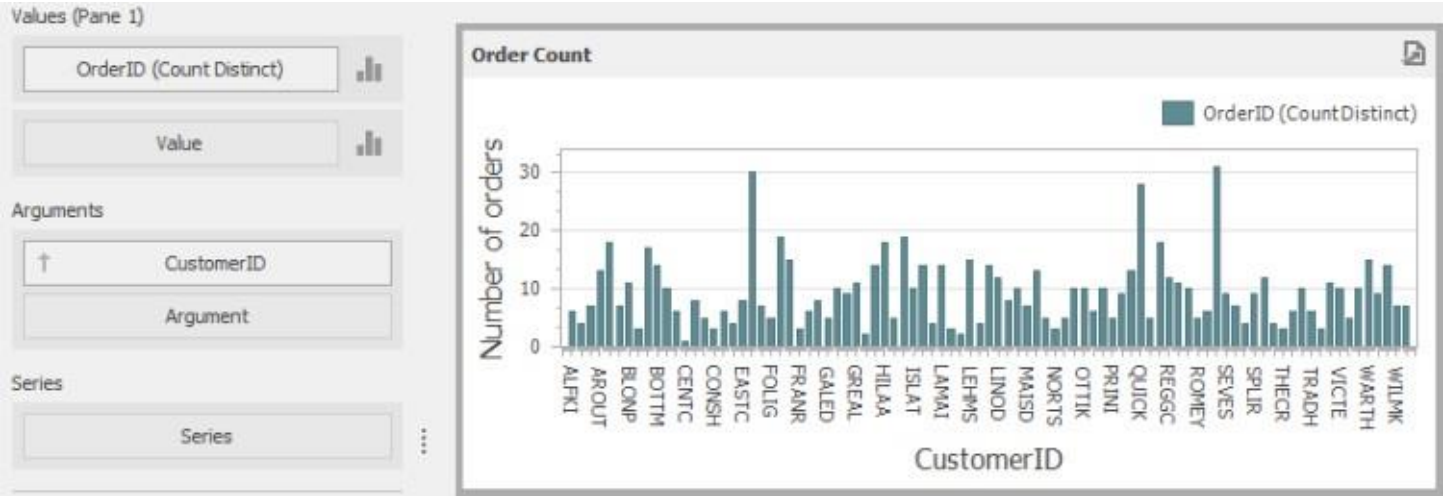
```
Aggr(Min(GetDateQuarterYear([OrderDate])), [CustomerID])
```

Set the name of the created field to Customer First Order and drop this field to the **Series** section to see the result.



Example 4 - Customer Order Count

In this example, you will learn how to divide customers count by the number of orders they made. The Chart below shows the number of orders that is made by each customer.



The calculated field below evaluates the number of unique orders made by each customer.

C#	
`Aggr(CountDistinct([OrderID]), [CustomerID])`	

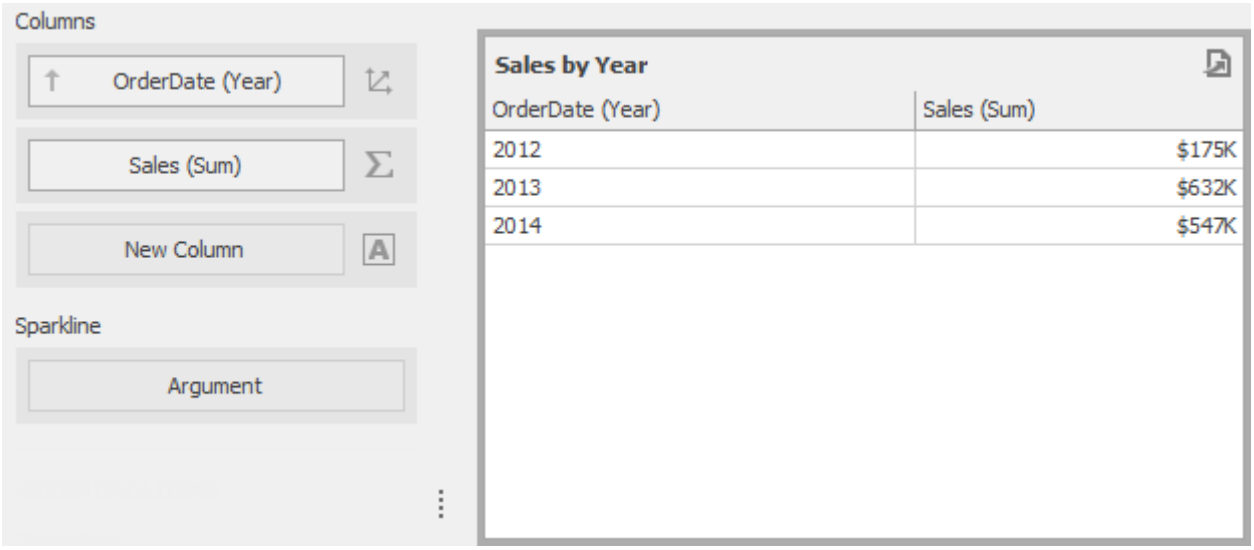
Set the name of this field to Customer Order Count and drop this field to arguments. Then, drop the CustomerID
field to **Values** and change its summary type to **Count Distinct**.

The Chart will show the number of customers that made a specific number of orders.

Example 5 - Best Product Sales by Year

This scenario requires the use of nested aggregations. In this example, the dashboard will show products with the best sales in a year along with sales values.

The initial Grid dashboard item shows sales of all products by year (the OrderDate column with the **Year** group interval and the Sales column). The data source also contains the ProductName field.



To implement this scenario, perform the following steps.

- Create the calculated field that will return product sales for individual years.

C#	
`Aggr(Sum([Sales]), GetYear([OrderDate]), [ProductName])`	

  Set its name to Product Sales by Year.

- Create the calculated field that will return maximum sales values.

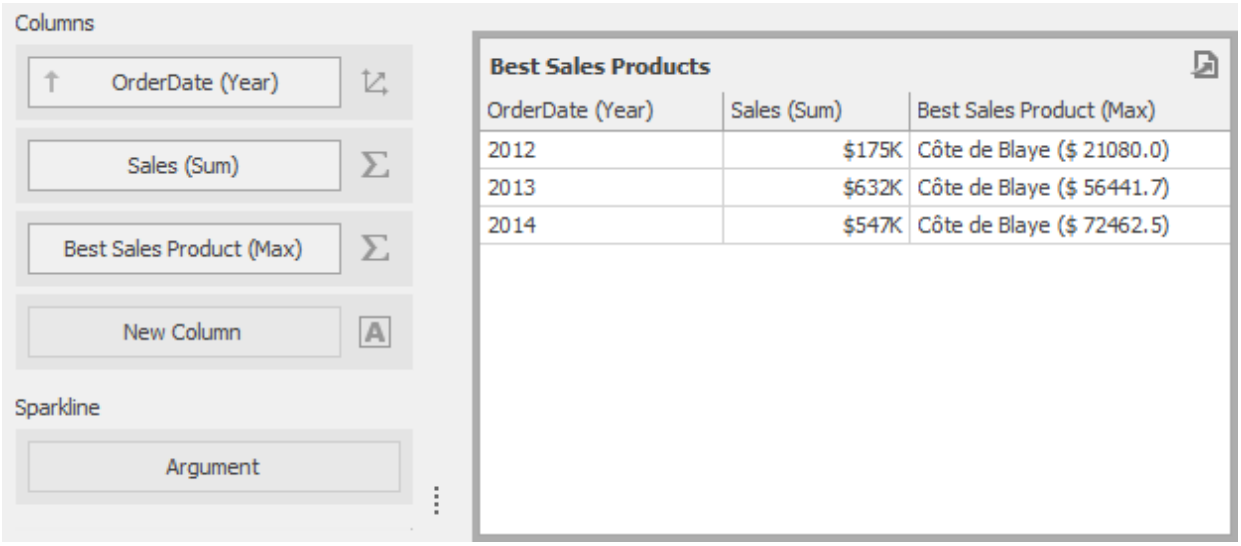
C#	
`Aggr(Max([Product Sales by Year]), GetYear([OrderDate]))`	

  Set its name to Max Product Sales by Year.

- Finally, create a calculated field returning the name of the product with the best sales and a corresponding sales value.

C#	
`Iif([Max Product Sales by Year] = [Product Sales by Year], [ProductName] + ' ($ ' + [Product Sa`	

Specify the name as Bes t Sales Produ ct. Then, drop this field to the **Columns** section to see the result.



Window Calculations

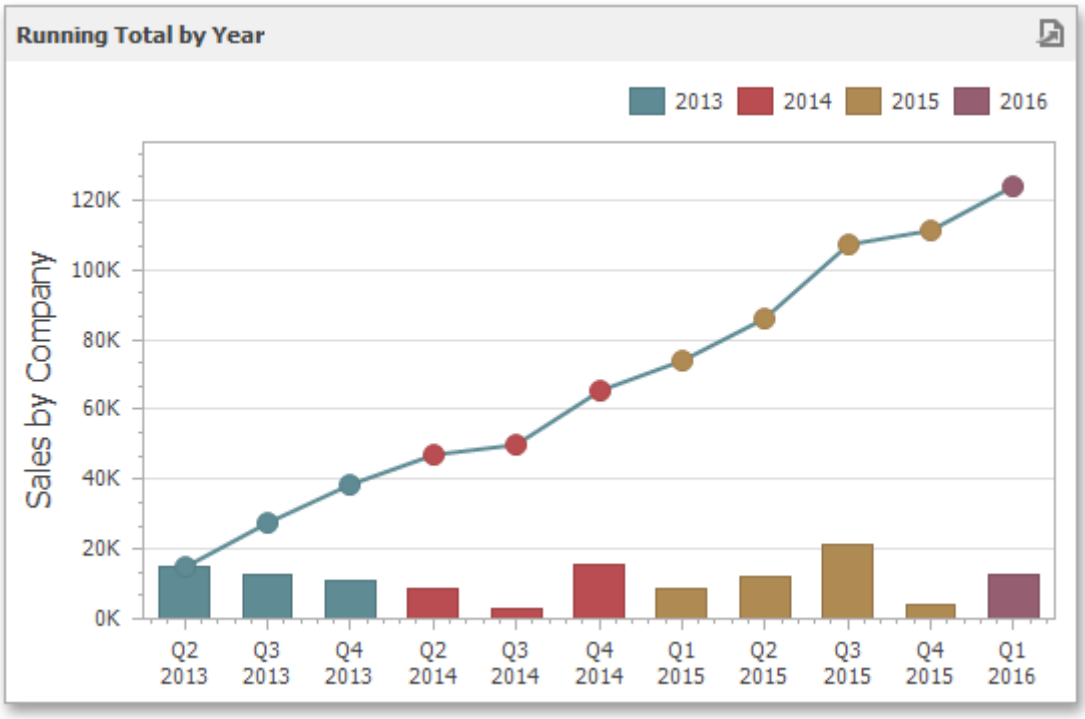
Window calculations provide the capability to apply specific computations to measure values and allow you to perform different analytical tasks such as to compute running totals, percentages of totals, differences, etc.

Topics in this section.

- Window Calculations
- Overview Window Definition
- Creating Window Calculations
- Calculation Functions
- Reference Window Calculation Limitations

Window Calculations Overview

Window calculations provide the capability to apply specific computations to measure values and allow you to perform different analytical tasks such as to compute running totals, percentages of totals, differences, etc.



The Dashboard Designer allows you to apply window calculations to values of the specified measure.
The following calculation types are supported.

- **Running Total** - Allows you to calculate a cumulative total for a set of measure values.

Sales	Running Total	
10	10	
20	30	20+10
25	55	25+20+10
25	80	25+25+20+10
20	100	20+25+25+20+10

- **Moving Calculation** - Allows you to apply a moving calculation, which uses neighboring values to calculate a total. Note that neighboring values are specified using offsets from the currently processed value.

Sales	Moving	StartOffset=-1; EndOffset=1
10	30	0+10+20
20	55	10+20+25
25	70	20+25+25
25	70	25+25+20
20	45	25+20+0

- **Difference** - Allows you to compute differences between measure values.

Sales	Difference	
10		
20	10	20-10
25	5	25-20
25	0	25-25
20	-5	20-25

- **Percent of Total** - Allows you to calculate a contribution of individual measure values to a total.

Sales	Percent	
10	10.00 %	10/100*100%
20	20.00 %	20/100*100%
25	25.00 %	25/100*100%
25	25.00 %	25/100*100%
20	20.00 %	20/100*100%

- **Rank** - Allows you to rank values of the specified measure.

Sales	Rank	Competition rank
10	1	10 20 20 25 25
20	2	1 2 2 4 4
25	4	
25	4	
20	2	

Note that the computing of calculations depends on two factors.

- The type of the dashboard item.
  In this case, you need to specify a calculation direction that depends on the dashboard item type. For instance, the Pivot dashboard item provides the capability to apply calculations along with its columns or rows.
- The set of dimensions that are used to calculate measure values.
  In this case, a calculation direction depends on the dimensions' order.

In both cases, measure values participating in a calculation fall into a specified w in dow. To learn more, see Window Definition.

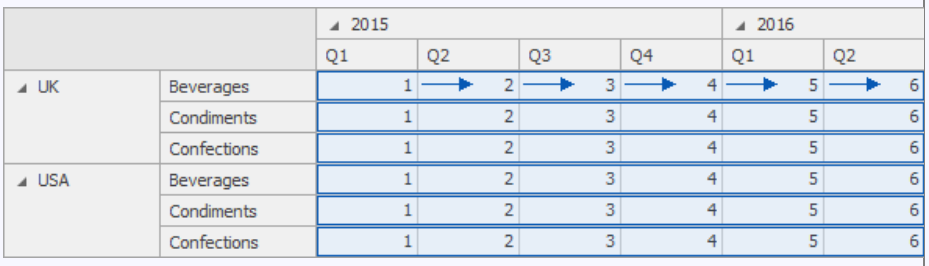
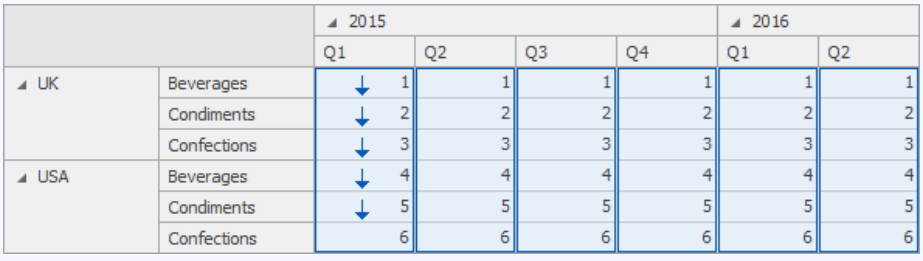
To learn how to create a calculation in the Dashboard Designer, see Creating Window Calculations.

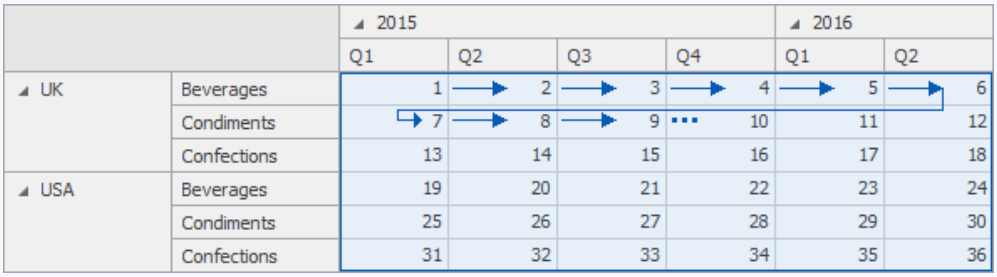
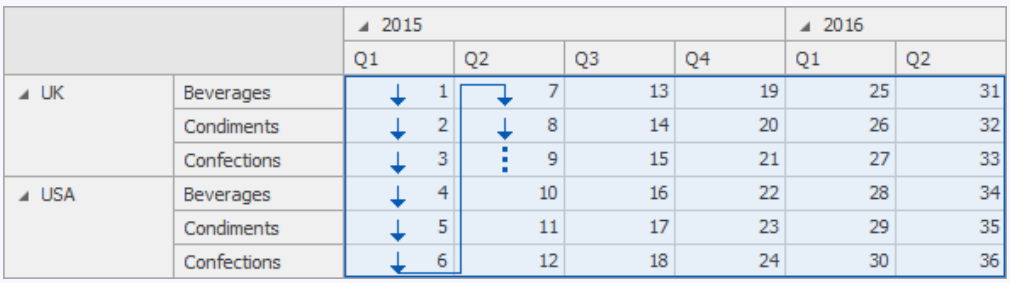
Window Definition

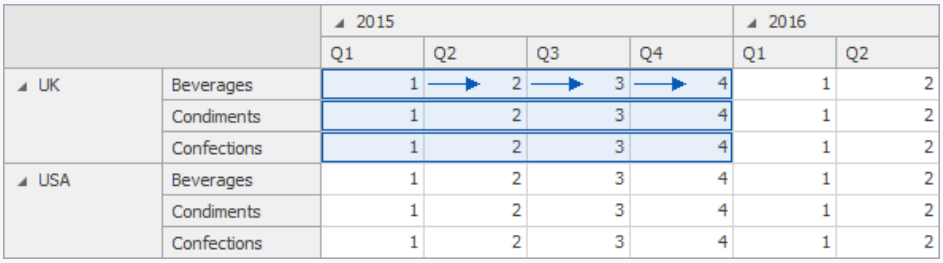
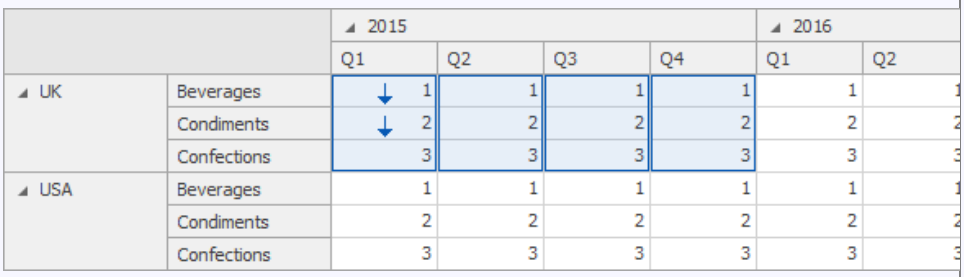
A w in dow defin ition specifies a window that limits measure values participating in a calculation. To learn more, see Window Calculations Overview.

Dashboard Item Window Definition

The following table lists window definitions in terms of the Pivot dashboard item. A calculation is performed using the Index function along the following direction s.

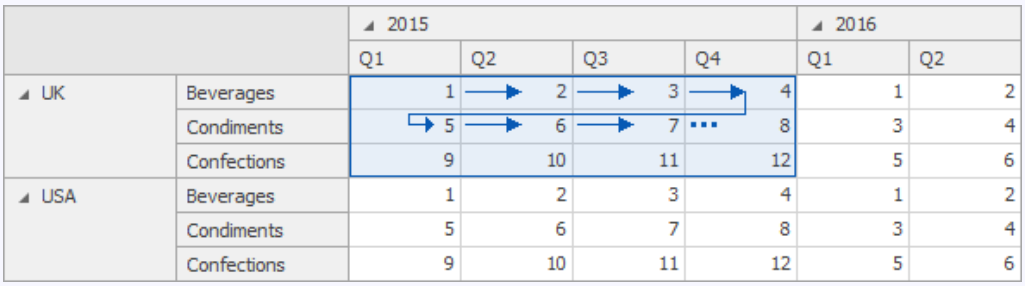
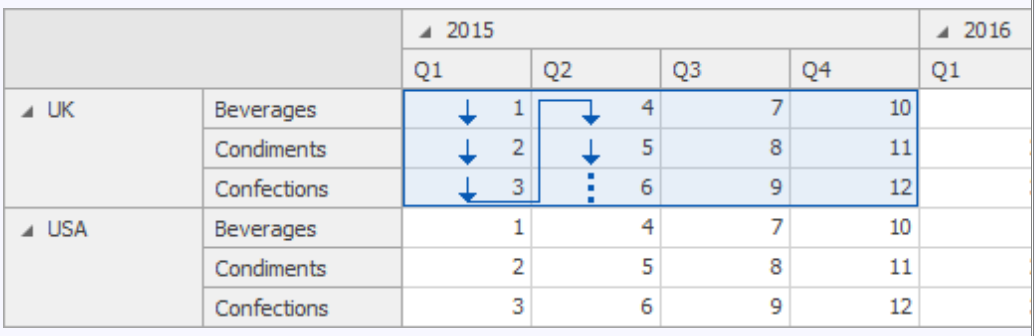
Dir ect ion	De scr ipti on	Example	Ex am ple De scr ipti on
Col um ns	A cal cul ati on is per for me d hor izo nta lly thr ou gh Piv ot col um ns.		In thi s ex am ple , a win do w is a co mbi nat ion of Co u nt ry/ Cat ego ry dim en sio ns.
Ro ws	A cal cul ati on is per for me d ver tic ally thr ou gh Piv		In thi s ex am ple , a win do w is a co mbi nat ion of Yea

	ot ro ws .		r/ Qu art er dim en sio ns.
Col um ns / Ro ws	A cal cul ati on is per for me d hor izo nta lly thr ou gh Piv ot col um ns, the n ro ws .		In thi s ex am ple , a win do w is the ent ire piv ot tab le.
Ro ws / Col um ns	A cal cul ati on is per for me d ver tic ally thr ou gh Piv ot ro ws , the n col um ns.		In thi s ex am ple , a win do w is the ent ire piv ot tab le.

Columns within Groups	A calculation is performed horizontally through Pivot column ns within group ups.		In this example, a window is a combination of the Country/ Category and Year dimensions.
Rows within Groups	A calculation is performed vertically through Pivot rows within group ups.		In this example, a window is a combination of the Year/ Quarter and Country dimensions.

		2015				2016	
		Q1	Q2	Q3	Q4	Q1	Q2
UK	Beverages	1	2	3	4	1	2
	Condiments	1	2	3	4	1	2
	Confections	1	2	3	4	1	2
USA	Beverages	1	2	3	4	1	2
	Condiments	1	2	3	4	1	2
	Confections	1	2	3	4	1	2

		2015				2016	
		Q1	Q2	Q3	Q4	Q1	Q2
UK	Beverages	1	1	1	1	1	1
	Condiments	2	2	2	2	2	2
	Confections	3	3	3	3	3	3
USA	Beverages	1	1	1	1	1	1
	Condiments	2	2	2	2	2	2
	Confections	3	3	3	3	3	3

Columns / Rows within Groups	A calculation is performed horizontally through Pivot columns then rows within groups.		In this example, a window is a combination of Country/ Year dimensions.
Rows / Columns within Groups	A calculation is performed vertically through Pivot rows, then columns within groups.		In this example, a window is a combination of Country/ Year dimensions.

* G rou p - an area that is limited by a set of values corresponding to the bottommost partitioning dimensions.

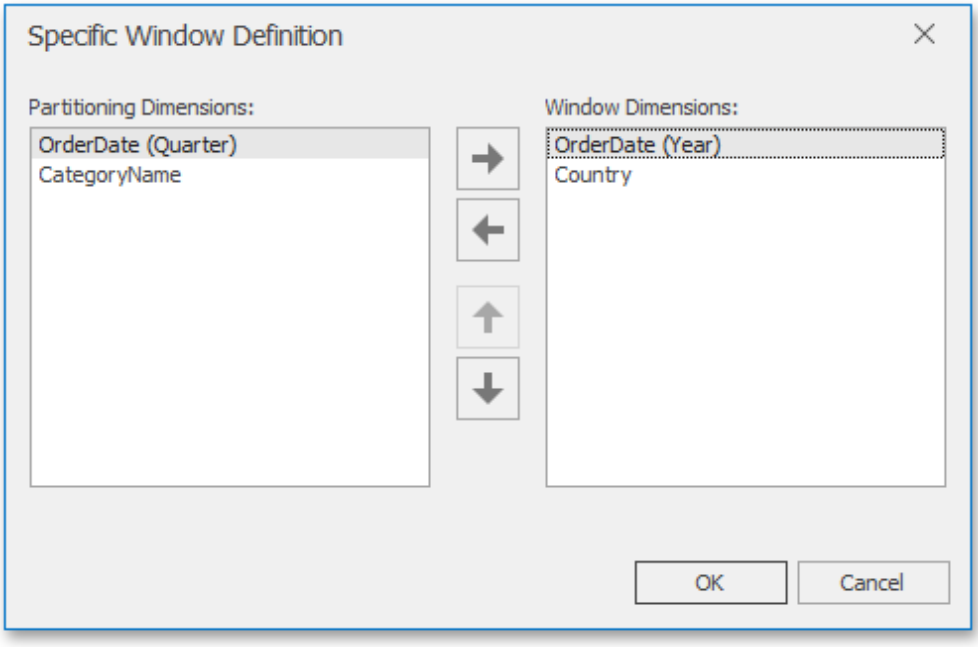
Specific Window Definition

If necessary, you can manually specify the set of dimensions that fall into the w in dow. These dimensions are called w in dow dim en s ion s.

For instance, the Index function is applied to measure values of the pivot table below using the OrderDate (Year)
and Cou n try window dimensions.

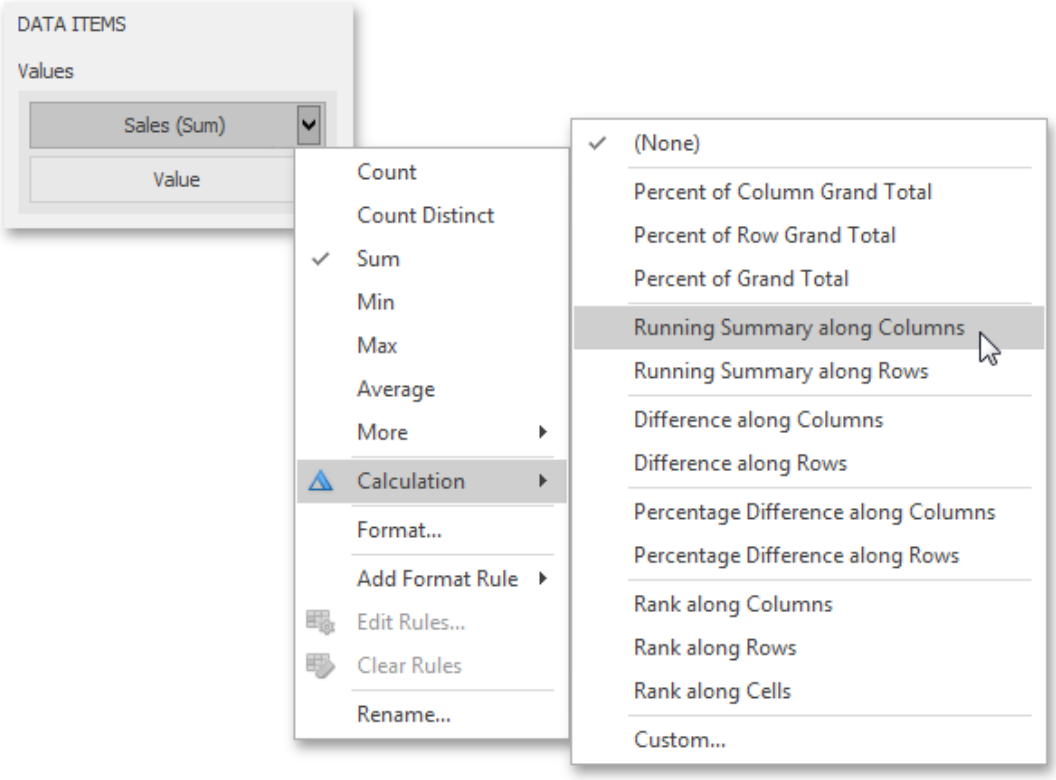
		2015				2016	
		Q1	Q2	Q3	Q4	Q1	Q2
UK	Beverages	1	1	1	1	3	3
	Condiments	1	1	1	1	3	3
	Confections	1	1	1	1	3	3
USA	Beverages	2	2	2	2	4	4
	Condiments	2	2	2	2	4	4
	Confections	2	2	2	2	4	4

The **Specific Window Definition** dialog allows you to do this.



Creating Window Calculations

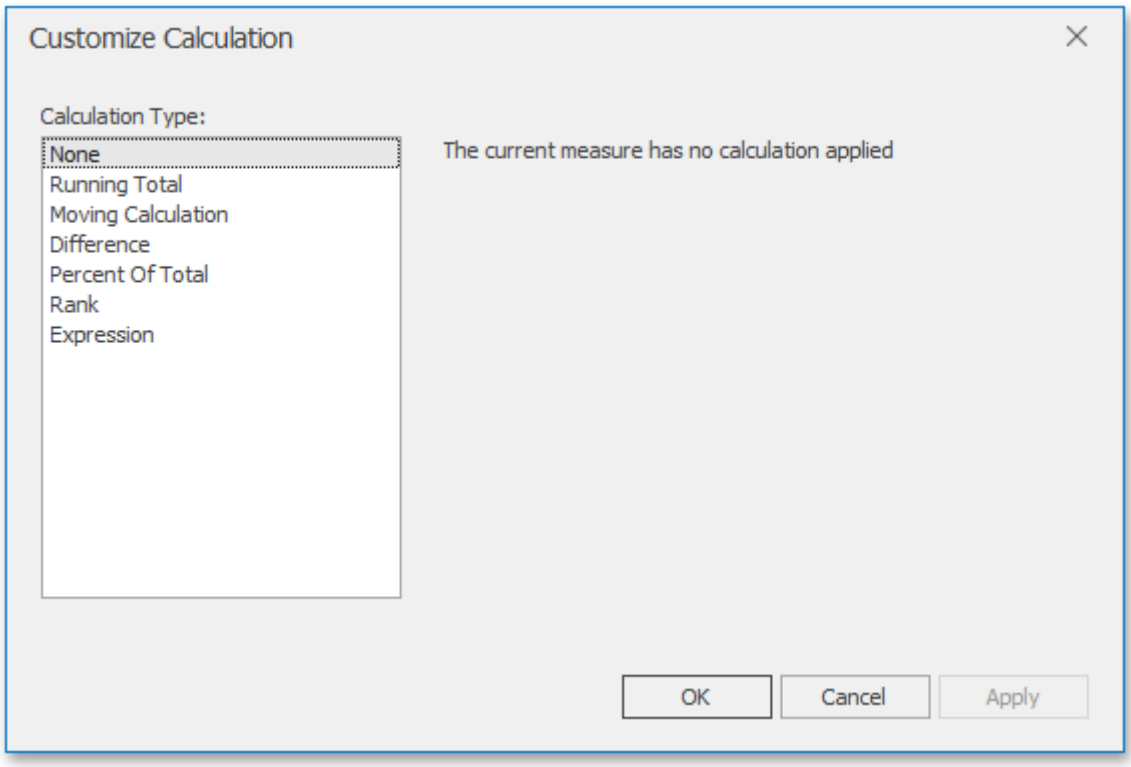
The Dashboard Designer allows you to add a window calculation for numeric measures. To do this, invoke the data item menu and select the required calculation type.



The image above shows a calculation menu of the Pivot dashboard item. The following items are available.

- **Percent of Column Grand Total** - Calculates a contribution of individual measure values to a column grand total.
- **Percent of Row Grand Total** - Calculates a contribution of individual measure values to a row grand total.
- **Percent of Grand Total** - Calculates a contribution of individual measure values to a grand total.
- **Running Summary along Columns** - Calculates a cumulative total for measure values along columns (horizontally).
- **Running Summary along Rows** - Calculates a cumulative total for measure values along rows (vertically). **Difference along Columns**
- - Calculates differences between measure values along columns (horizontally). **Difference along Rows** - Calculates differences
- between measure values along rows (vertically).
- **Percent Difference along Columns** - Calculates percentage differences between measure values along columns (horizontally).
- **Percent Difference along Rows** - Calculates percentage differences between measure values along rows (vertically).
- **Rank along Columns** - Ranks measure values along columns (horizontally).
- **Rank along Rows** - Ranks measure values along rows (vertically).
- **Rank along Cells** - Ranks measure values along cells (throughout the entire pivot table).
- **Custom...** - Allows you to create a custom calculation by specifying various settings. Clicking this tem

invokes the **Customize Calculation** dialog that allows you to add additional customizations to



calculations.

To learn more, see descriptions of the available calculations below.

Note

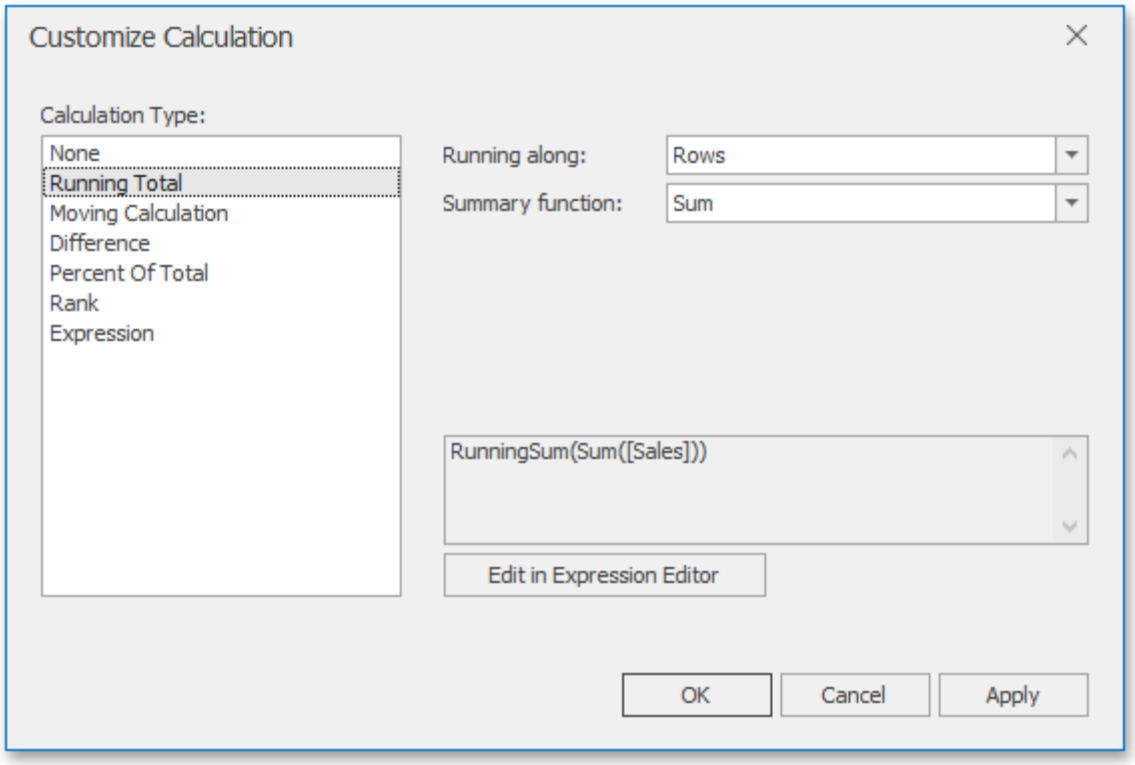
Note that the list of available items in this menu can be changed by the Dashboard Designer dynamically. For instance, if the Pivot dashboard item does not contain dimensions in the **Rows** section, menu items related to rows will be disabled.

Running Total

The Running Total calculation can be used to compute a cumulative total for the specified measure across a window. For example, the Grid below displays cumulative sales across all quarters.

Order Year	Order Quarter	Sales	Running Total
2015	Q1	$138K	$138K
	Q2	$143K	$281K
	Q3	$154K	$435K
	Q4	$182K	$617K
2016	Q1	$298K	$916K
	Q2	$142K	$1.06M

The Customize Calculation dialog provides the following settings for the Running Total calculation.



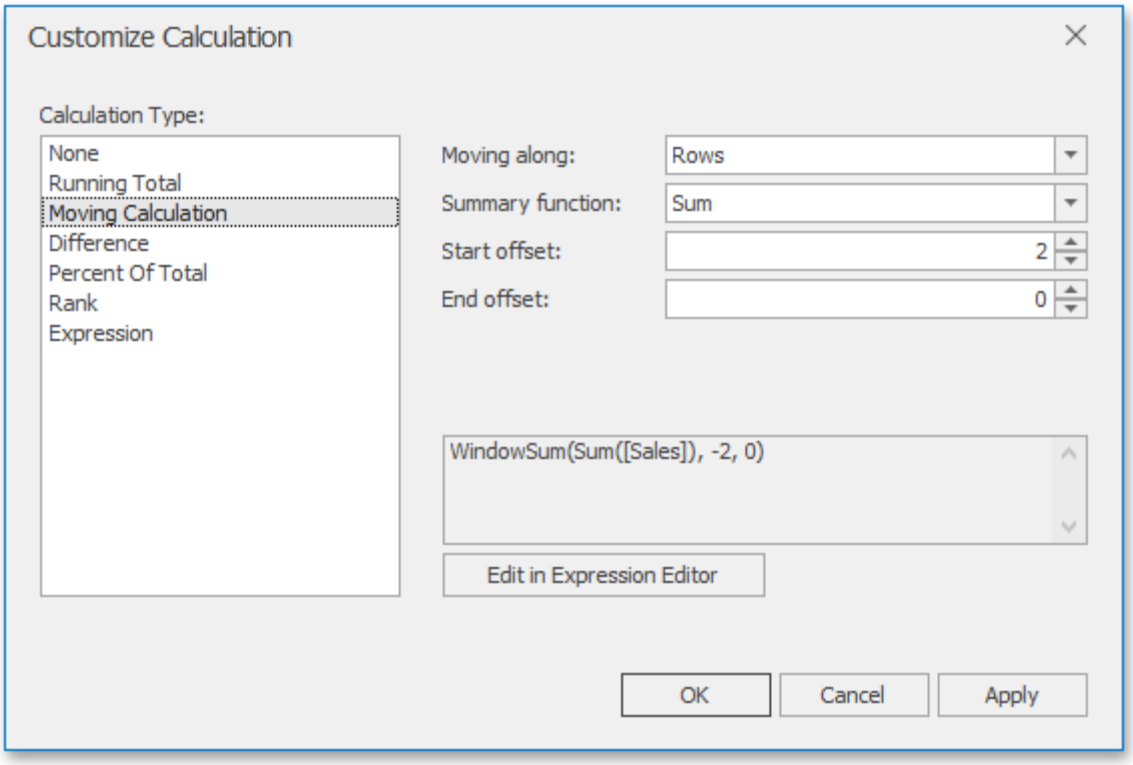
- **Running along** - Specifies a window and direction used to calculate running totals.
- **Summary function** - Specifies a summary function used to apply calculation. To learn more about the available summary functions, see the **Summary Function Types** in the summary function topic.

Moving Calculation

The Moving calculation uses neighboring values to calculate a total. For example, the Grid below shows a moving average across all quarters.

Order Year	Order Quarter	Sales	Moving Average
2015	Q1	$138K	$138K
	Q2	$143K	$141K
	Q3	$154K	$145K
	Q4	$182K	$160K
2016	Q1	$298K	$211K
	Q2	$142K	$207K

The Customize Calculation dialog provides the following settings for the Moving calculation.



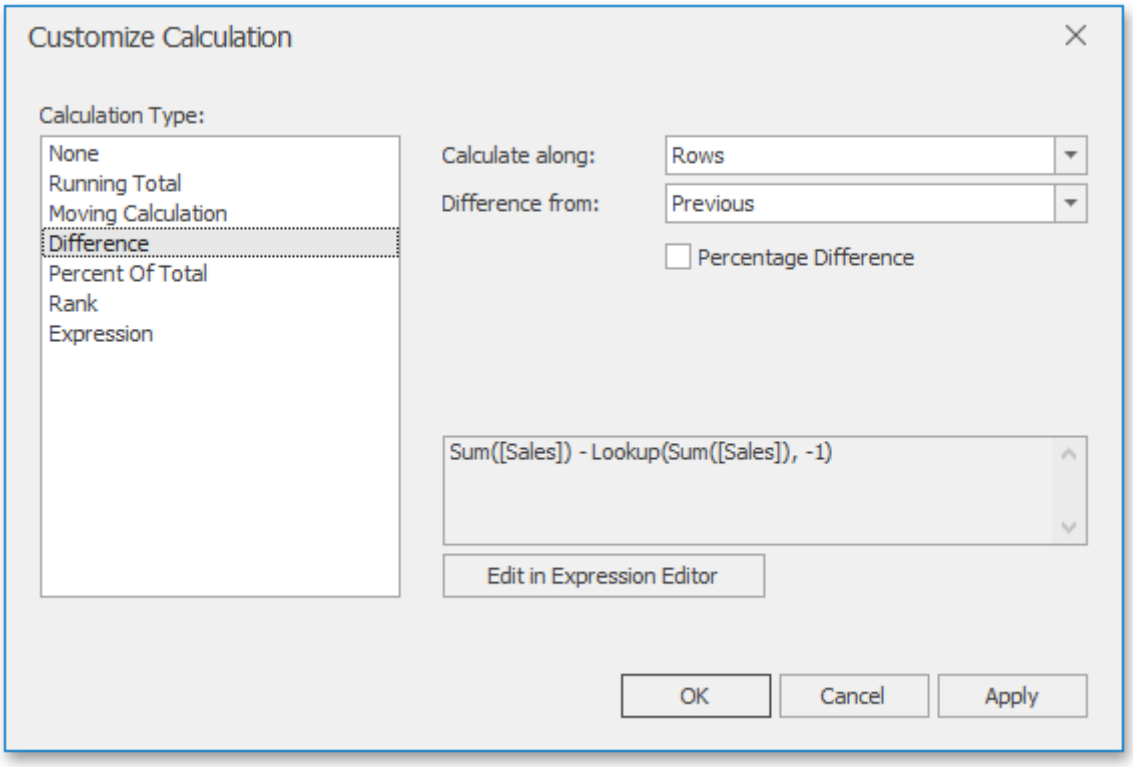
- **Moving along** - Specifies a window and direction used to apply a calculation.
- **Summary function** - Specifies a summary function used to apply a calculation. To learn more about the available summary functions, see the **Summary Function Types** in the summary function topic.
- **Start offset** / **End offset** - Specify start/end offsets from the currently processed value. For instance, if you specified offsets as 1/1, the previous and next values will be used along with the current value to apply the Moving calculation.

Difference

The Difference calculation can be used to compute the difference between measure values across a window. For example, the Grid below shows absolute differences between quarterly sales.

Order Year	Order Quarter	Sales	Difference
2015	Q1	$138K	
	Q2	$143K	$4.89K
	Q3	$154K	$10.8K
	Q4	$182K	$27.7K
2016	Q1	$298K	$117K
	Q2	$142K	($156K)

The Customize Calculation dialog provides the following settings for the Difference calculation.



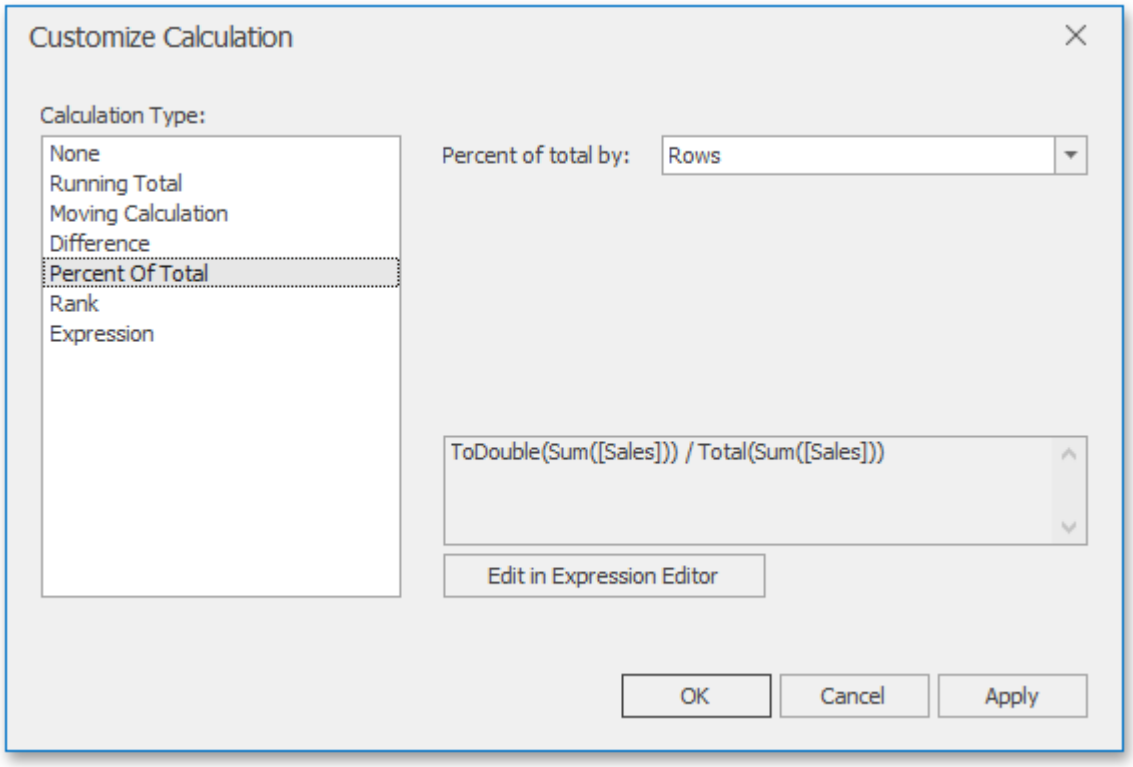
- **Calculate along** - Specifies a window and direction used to calculate differences.
- **Difference from** - Specifies the value used to calculate the difference. The following values are available:
  Previous, Next, First and Last.
  You can also use the **Percent Difference** option to specify whether the absolute or percentage difference is displayed.

Percent of Total

A calculation is used to compute a percentage of the total for the specified measure across a window.
For example, the Grid below shows a contribution of individual quarterly sales to total sales.

Order Year	Order Quarter	Sales	Percent of Total
2015	Q1	$138K	13.07 %
	Q2	$143K	13.54 %
	Q3	$154K	14.55 %
	Q4	$182K	17.18 %
2016	Q1	$298K	28.22 %
	Q2	$142K	13.44 %

The Customize Calculation dialog provides the following settings for the Percent of Total calculation.



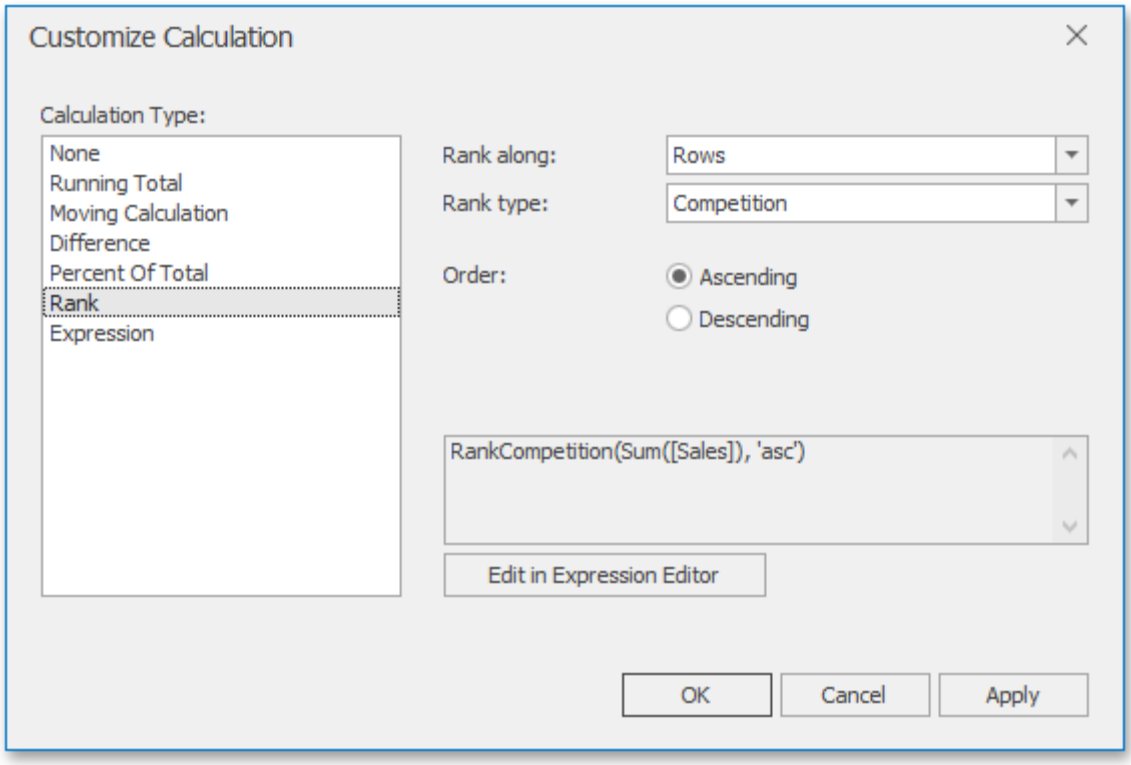
- **Percent of Total** - Specifies a window and direction used to apply a Percent of Total calculation.

Rank

Use the Rank calculation to compute rankings for the specified measure across a window. For example, the Grid below shows a ranking of sales for individual quarters.

Order Year	Order Quarter	Sales	Rank
2015	Q1	$138K	6
	Q2	$143K	4
	Q3	$154K	3
	Q4	$182K	2
2016	Q1	$298K	1
	Q2	$142K	5

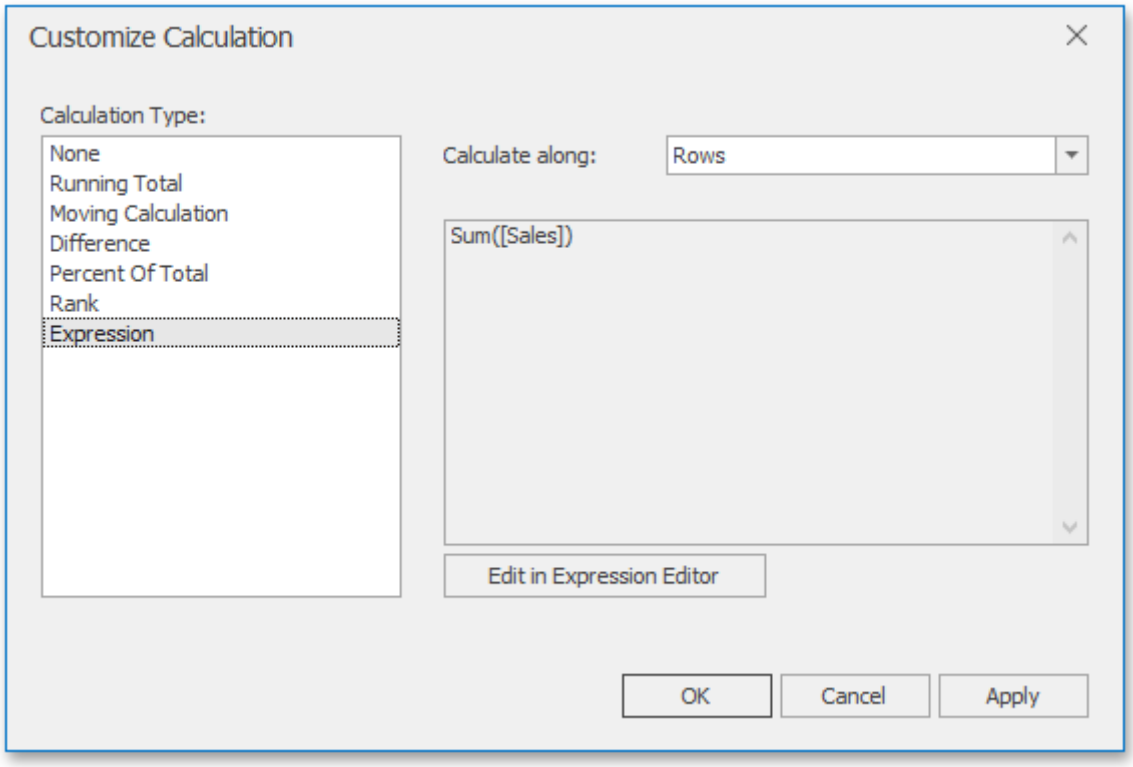
The Customize Calculation dialog provides the following settings for the Rank calculation



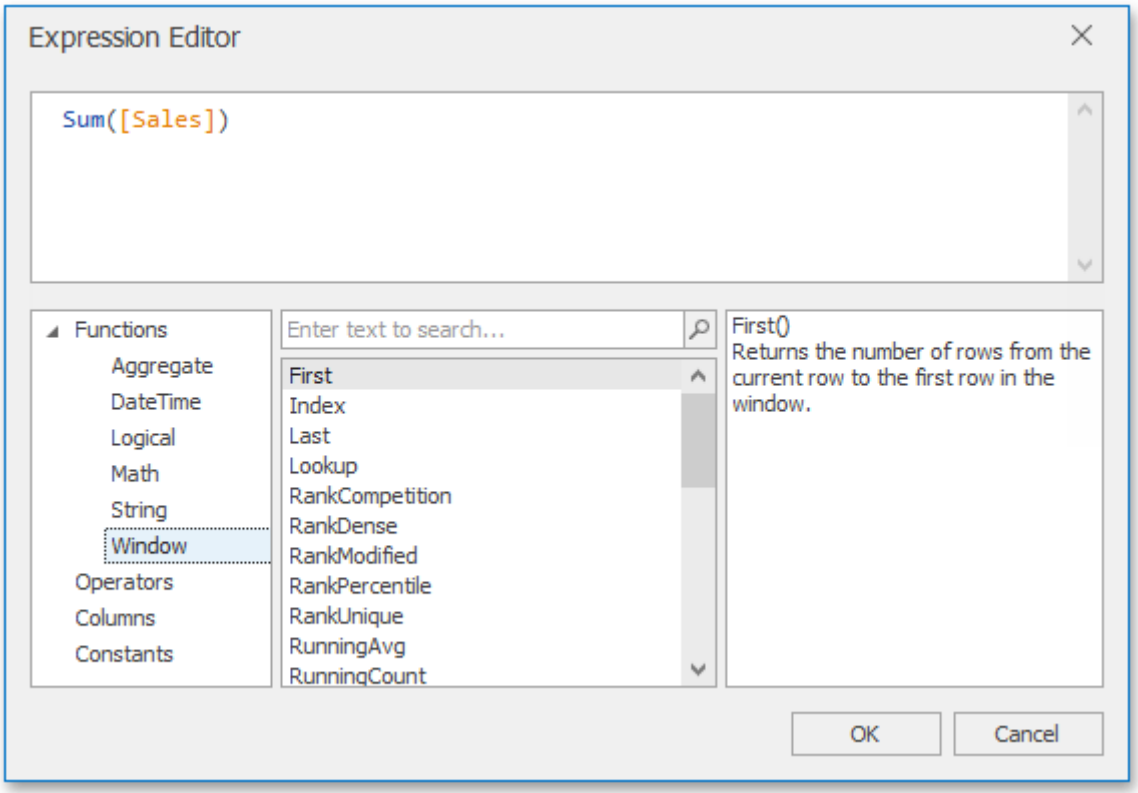
- **Rank along** - Specifies a window and direction used to rank values.
- **Rank type** - Specifies the type of ranking. The following rank types are available: Unique, Competition, Dense, Modified and Percentile.
- **Order** - Specifies the order of ranking. You can select Ascending or Descending.

Expression

Use Expression to specify a custom calculation by adding the required calculation functions inside the measure expression.



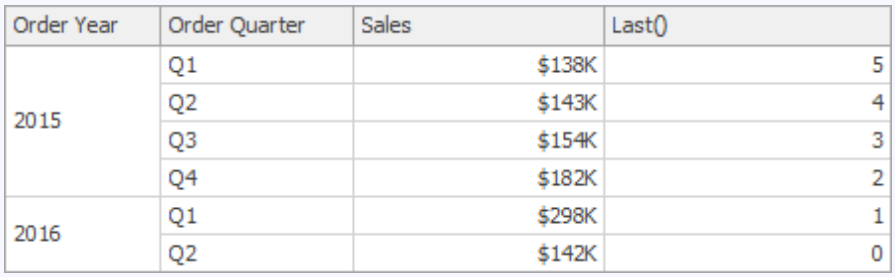
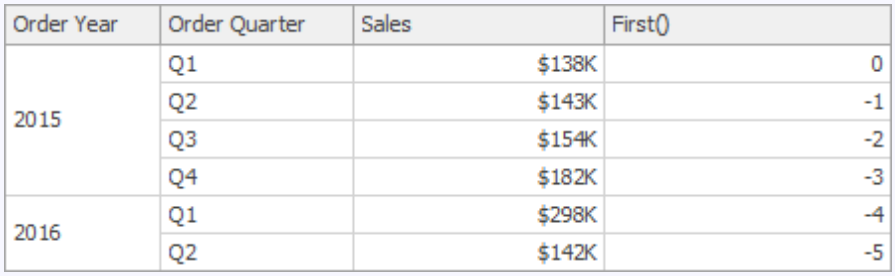
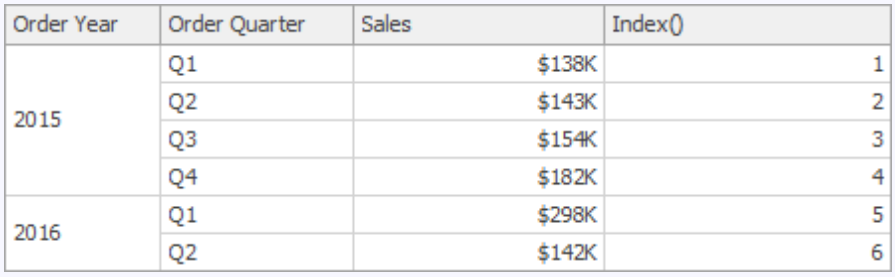
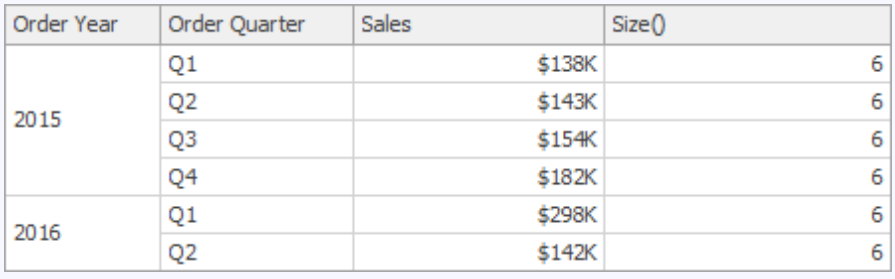
Click the Edit in Expression Editor button to invoke the Expression Editor and specify the required expression.



The Expression type provides the Calculate along option that specifies the window and direction used to calculate differences. Note that this option is in effect if the expression contains a calculation function.

Calculation Functions Reference

This topic contains the descriptions of window functions that can be used to specify measure expressions.

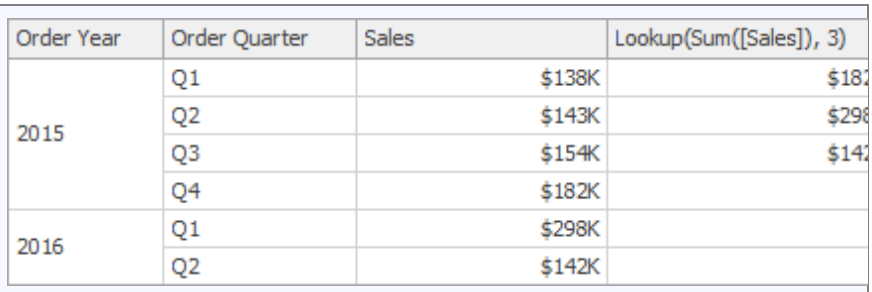
Function	Description	Example	Image
Last()	Returns the number of rows from the current row to the last row in the window.	Last()	
First()	Returns the number of rows from the current row to the first row in the window.	First()	
Index ()	Returns the index of the current row in the window.	Index ()	
Size()	Returns the number of rows in the window.	Size()	

Order Year	Order Quarter	Sales	Last()
2015	Q1	$138K	5
	Q2	$143K	4
	Q3	$154K	3
	Q4	$182K	2
2016	Q1	$298K	1
	Q2	$142K	0

Order Year	Order Quarter	Sales	First()
2015	Q1	$138K	0
	Q2	$143K	-1
	Q3	$154K	-2
	Q4	$182K	-3
2016	Q1	$298K	-4
	Q2	$142K	-5

Order Year	Order Quarter	Sales	Index()
2015	Q1	$138K	1
	Q2	$143K	2
	Q3	$154K	3
	Q4	$182K	4
2016	Q1	$298K	5
	Q2	$142K	6

Order Year	Order Quarter	Sales	Size()
2015	Q1	$138K	6
	Q2	$143K	6
	Q3	$154K	6
	Q4	$182K	6
2016	Q1	$298K	6
	Q2	$142K	6

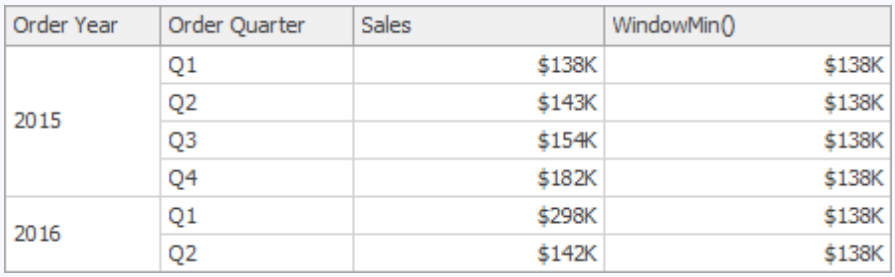
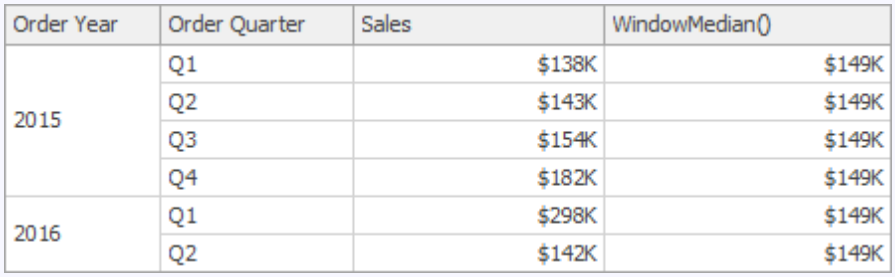
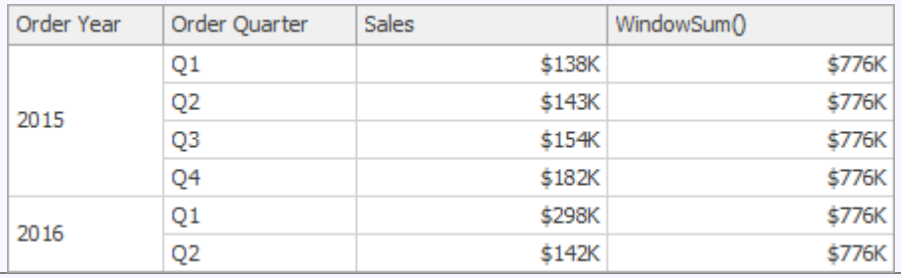
Looku p (Summ aryExp ressio n, Positio n)	Return s the value of the expres sion in a target positio n specifi ed as a relativ e offset from the curren t positio n.	Looku p(Sum ([Sale s]), 3)	
RankC ompeti tion (Summ aryExp ressio n, ['asc' | 'desc'])	Return s the stand ard compe tition rank for the curren t row in the windo w.	RankC ompeti tion (Sum ([Sale s]), 'asc')	-
RankD ense (Summ aryExp ressio n, ['asc' | 'desc'])	Return s the dense rank for the curren t row in the windo w.	RankD ense (Sum ([Sale s]), 'asc')	-
RankU nique (Summ aryExp ressio n, ['asc' | 'desc'])	Return s the unique rank for the curren t row in the windo w.	RankU nique (Sum ([Sale s]), 'asc')	-
RankM odified (Summ aryExp ressio n,	Return s the modifi ed compe tition	RankM odified (Sum ([Sale s]), 'asc')	-

Order Year	Order Quarter	Sales	Lookup(Sum([Sales]), 3)
2015	Q1	$138K	$182
	Q2	$143K	$298
	Q3	$154K	$142
	Q4	$182K	
2016	Q1	$298K	
	Q2	$142K	

['asc' | 'desc'])	rank for the curren t row in the windo w.		
RankP ercenti le (Summ aryExp ressio n, ['asc' | 'desc'])	Return s the percen tile rank for the curren t row in the windo w.	RankP ercenti le(Sum ([Sale s]), 'desc')	-
Runnin gAvg (Summ aryExp ressio n)	Return s the runnin g avera ge of the specifi ed expres sion from the first row in the windo w to the curren t row.	Runnin gAvg (Sum ([Sale s]))	Order Year / Order Quarter / Sales / RunningAvg(Sum([Sales])): 2015 Q1 $138K $138K; 2015 Q2 $143K $141K; 2015 Q3 $154K $145K; 2015 Q4 $182K $154K; 2016 Q1 $298K $183K; 2016 Q2 $142K $176K
Runnin gCoun t (Summ aryExp ressio n)	Return s the runnin g count of the specifi ed expres sion from the first row in the windo w to the curren t row.	Runnin gCoun t(Sum ([Sale s]))	-

<table>
<tr>
<td>RunningMax(SummaryExpression)</td>
<td>Returns the running maximum of the specified expression from the first row in the window to the current row.</td>
<td>RunningMax(Sum([Sales]))</td>
<td>
<table>
<tr><th>Order Year</th><th>Order Quarter</th><th>Sales</th><th>RunningMax(Sum([Sales]))</th></tr>
<tr><td rowspan="4">2015</td><td>Q1</td><td>$138K</td><td>$138K</td></tr>
<tr><td>Q2</td><td>$143K</td><td>$143K</td></tr>
<tr><td>Q3</td><td>$154K</td><td>$154K</td></tr>
<tr><td>Q4</td><td>$182K</td><td>$182K</td></tr>
<tr><td rowspan="2">2016</td><td>Q1</td><td>$298K</td><td>$298K</td></tr>
<tr><td>Q2</td><td>$142K</td><td>$298K</td></tr>
</table>
</td>
</tr>
<tr>
<td>RunningMin(SummaryExpression)</td>
<td>Returns the running minimum of the specified expression from the first row in the window to the current row.</td>
<td>RunningMin(Sum([Sales]))</td>
<td>
<table>
<tr><th>Order Year</th><th>Order Quarter</th><th>Sales</th><th>RunningMin(Sum([Sales]))</th></tr>
<tr><td rowspan="4">2015</td><td>Q1</td><td>$138K</td><td>$138K</td></tr>
<tr><td>Q2</td><td>$143K</td><td>$138K</td></tr>
<tr><td>Q3</td><td>$154K</td><td>$138K</td></tr>
<tr><td>Q4</td><td>$182K</td><td>$138K</td></tr>
<tr><td rowspan="2">2016</td><td>Q1</td><td>$298K</td><td>$138K</td></tr>
<tr><td>Q2</td><td>$142K</td><td>$138K</td></tr>
</table>
</td>
</tr>
<tr>
<td>RunningSum(SummaryExpression)</td>
<td>Returns the running sum of the specified expression from the first row in the window to the current row.</td>
<td>RunningSum(Sum([Sales]))</td>
<td>
<table>
<tr><th>Order Year</th><th>Order Quarter</th><th>Sales</th><th>RunningSum(Sum([Sales]))</th></tr>
<tr><td rowspan="4">2015</td><td>Q1</td><td>$138K</td><td>$138K</td></tr>
<tr><td>Q2</td><td>$143K</td><td>$281K</td></tr>
<tr><td>Q3</td><td>$154K</td><td>$435K</td></tr>
<tr><td>Q4</td><td>$182K</td><td>$617K</td></tr>
<tr><td rowspan="2">2016</td><td>Q1</td><td>$298K</td><td>$916K</td></tr>
<tr><td>Q2</td><td>$142K</td><td>$1.06M</td></tr>
</table>
</td>
</tr>
</table>

<table>
<tr>
<td>Window Avg (SummaryExpression, StartOffset, EndOffset)</td>
<td>Returns the average of the expression within the window, which is defined using offsets from the current row.</td>
<td>Window Avg (Sum([Sales]), First(), Last())</td>
<td>
<table>
<tr><th>Order Year</th><th>Order Quarter</th><th>Sales</th><th>WindowAvg()</th></tr>
<tr><td rowspan="4">2015</td><td>Q1</td><td>$138K</td><td>$176K</td></tr>
<tr><td>Q2</td><td>$143K</td><td>$176K</td></tr>
<tr><td>Q3</td><td>$154K</td><td>$176K</td></tr>
<tr><td>Q4</td><td>$182K</td><td>$176K</td></tr>
<tr><td rowspan="2">2016</td><td>Q1</td><td>$298K</td><td>$176K</td></tr>
<tr><td>Q2</td><td>$142K</td><td>$176K</td></tr>
</table>
</td>
</tr>
<tr>
<td>Window Count (SummaryExpression, StartOffset, EndOffset)</td>
<td>Returns the count of the expression within the window.</td>
<td>Window Count (Sum([Sales]), First()+2, Last())</td>
<td>
<table>
<tr><th>Order Year</th><th>Order Quarter</th><th>Sales</th><th>WindowCount()</th></tr>
<tr><td rowspan="4">2015</td><td>Q1</td><td>$138K</td><td>4</td></tr>
<tr><td>Q2</td><td>$143K</td><td>4</td></tr>
<tr><td>Q3</td><td>$154K</td><td>4</td></tr>
<tr><td>Q4</td><td>$182K</td><td>4</td></tr>
<tr><td rowspan="2">2016</td><td>Q1</td><td>$298K</td><td>4</td></tr>
<tr><td>Q2</td><td>$142K</td><td>4</td></tr>
</table>
</td>
</tr>
<tr>
<td>WindowCountDistinct (SummaryExpression, StartOffset, EndOffset)</td>
<td>Returns the distinct count of the expression within the window.</td>
<td>WindowCountDistinct (Sum([Sales]), First(), Last())</td>
<td>-</td>
</tr>
<tr>
<td>Window Max (SummaryExpression, StartOffset, EndOffset)</td>
<td>Returns the maximum of the expression within the window.</td>
<td>Window Max (Sum([Sales]), First(), Last())</td>
<td>
<table>
<tr><th>Order Year</th><th>Order Quarter</th><th>Sales</th><th>WindowMax()</th></tr>
<tr><td rowspan="4">2015</td><td>Q1</td><td>$138K</td><td>$298K</td></tr>
<tr><td>Q2</td><td>$143K</td><td>$298K</td></tr>
<tr><td>Q3</td><td>$154K</td><td>$298K</td></tr>
<tr><td>Q4</td><td>$182K</td><td>$298K</td></tr>
<tr><td rowspan="2">2016</td><td>Q1</td><td>$298K</td><td>$298K</td></tr>
<tr><td>Q2</td><td>$142K</td><td>$298K</td></tr>
</table>
</td>
</tr>
</table>

WindowMin(SummaryExpression, StartOffset, EndOffset)	Returns the minimum of the expression within the window.	WindowMin(Sum([Sales]), First(), Last())	
WindowMedian(SummaryExpression, StartOffset, EndOffset)	Returns the median of the expression within the window.	WindowMedian(Sum([Sales]), First(), Last())	
WindowSum(SummaryExpression, StartOffset, EndOffset)	Returns the sum of the expression within the window.	WindowSum(Sum([Sales]), First()+2, Last())	
WindowVar(SummaryExpression, StartOffset, EndOffset)	Returns the variance of the expression within the window.	WindowVar(Sum([Sales]), First(), Last())	-
WindowVarp(SummaryExpression, StartOffset, EndOffset)	Returns the biased variance of the expression within the window.	WindowVarp(Sum([Sales]), First(), Last())	-
WindowStdDev(SummaryExp	Returns the sample stand	WindowStdDev(Sum([Sale	-

Order Year	Order Quarter	Sales	WindowMin()
2015	Q1	$138K	$138K
	Q2	$143K	$138K
	Q3	$154K	$138K
	Q4	$182K	$138K
2016	Q1	$298K	$138K
	Q2	$142K	$138K

Order Year	Order Quarter	Sales	WindowMedian()
2015	Q1	$138K	$149K
	Q2	$143K	$149K
	Q3	$154K	$149K
	Q4	$182K	$149K
2016	Q1	$298K	$149K
	Q2	$142K	$149K

Order Year	Order Quarter	Sales	WindowSum()
2015	Q1	$138K	$776K
	Q2	$143K	$776K
	Q3	$154K	$776K
	Q4	$182K	$776K
2016	Q1	$298K	$776K
	Q2	$142K	$776K

<table>
<tr><td>ressio n, StartO ffset, EndOff set)</td><td>ard deviation of the expres sion within the windo w.</td><td>s]), First(), Last())</td><td></td></tr>
<tr><td>Windo w StdD evp (Summ aryExp ressio n, StartO ffset, EndOff set)</td><td>Return s the biased stand ard deviati on of the expres sion within the windo w.</td><td>Windo w StdD evp (Sum ([Sale s]), First(), Last())</td><td>-</td></tr>
<tr><td>Total (Summ aryExp ressio n)</td><td>Return s the total for the specifi ed expres sion in a calcula tion windo w. Note that the Total functio n calcula tes the total based on values from the underl ying data source .</td><td>Total (Sum ([Sale s]))</td><td>
<table>
<tr><th>Order Year</th><th>Order Quarter</th><th>Sales</th><th>Total(Sum([Sales]))</th></tr>
<tr><td rowspan="4">2015</td><td>Q1</td><td>$138K</td><td>$1.06M</td></tr>
<tr><td>Q2</td><td>$143K</td><td>$1.06M</td></tr>
<tr><td>Q3</td><td>$154K</td><td>$1.06M</td></tr>
<tr><td>Q4</td><td>$182K</td><td>$1.06M</td></tr>
<tr><td rowspan="2">2016</td><td>Q1</td><td>$298K</td><td>$1.06M</td></tr>
<tr><td>Q2</td><td>$142K</td><td>$1.06M</td></tr>
</table>
</td></tr>
</table>

Important

Note that window functions cannot be used inside **Aggr**.

Window Calculation Limitations

Supported Dashboard Items

Window calculations can be applied to measures of the following dashboard items.

- Chart
- Grid
- Pies
- Cards
- Gauges
- Pivot
- Range Filter

Data Shaping Limitations

The use of calculations imposes the following limitations related to data shaping features.

- Sorting by measure cannot be applied if the target measure has a calculation
- applied. Top N cannot be applied if its target measure has a calculation.

Using Dashboard Parameters

You can use **dashboard parameters** when it is necessary to pass data of a certain type to a dashboard (e.g., to pass a specific value to the data source filter string or a calculated field).

The topics in this section describe how to use dashboard parameters.

- Creating Parameters
- Passing Parameter Values Requesting Parameter Values

Creating Parameters

This topic explains how to create a new dashboard parameter and specify its settings.

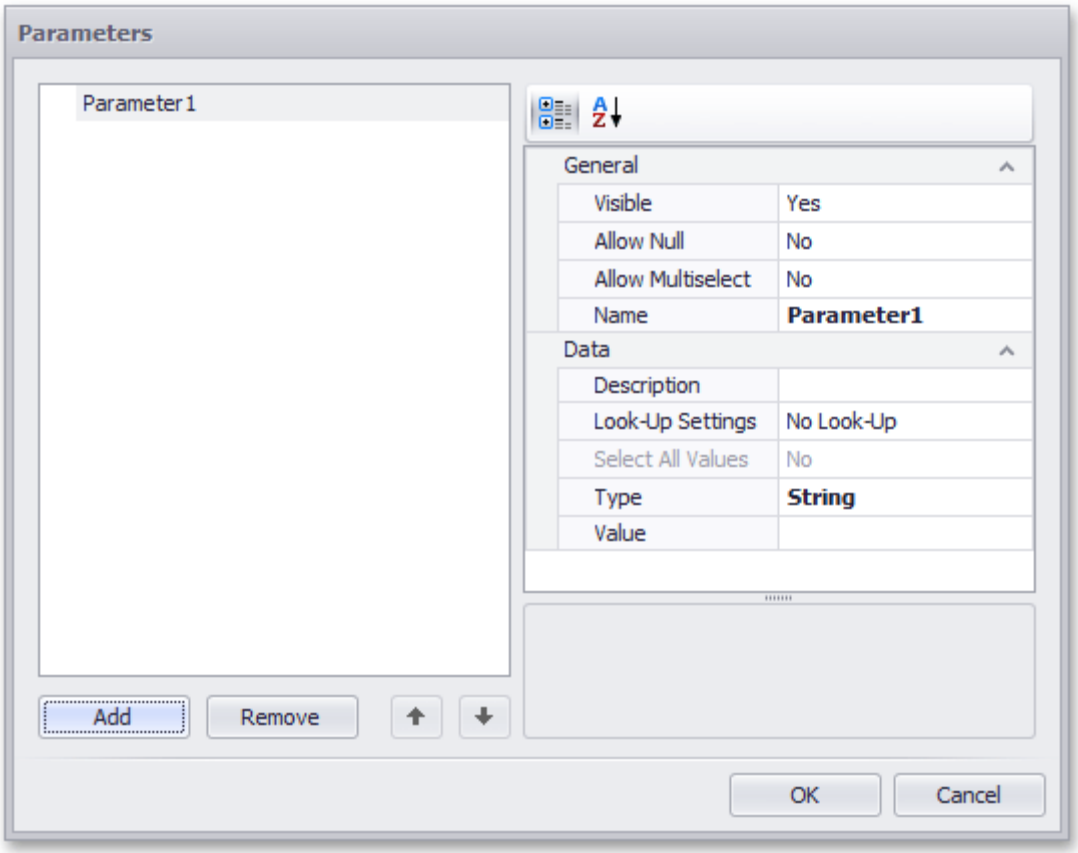
- Creating Parameters in the Dashboard
- Designer Look-Up Editor Settings

Creating Parameters in the Dashboard Designer

To create dashboard parameters in the Dashboard Designer, do the following:

1. Click the **Parameters** button on the Ribbon's **Data Source** tab.

2. In the invoked dialog, click the **Add** button to add a new parameter.



3. Specify the following settings.

- **Visible** - Specifies whether or not the parameter editor is visible in the Dashboard Parameters dialog.
- **Allow Null** - Specifies whether or a not null value can be passed as a parameter value.
- **Allow Multiselect** - Specifies whether or not multi-selection is enabled for the current parameter. The following limitations are applied to parameters with multi-selection enabled.
  - Use the **is any of** or **is none of** operators to pass a multi-select parameter to a filter criteria or to

the Expression format condition.

- Use the **In** or **Not In** operators to pass a multi-select parameter to a calculated field
- expression. Stored procedures used in the SQL data source do not support multi-select parameters.

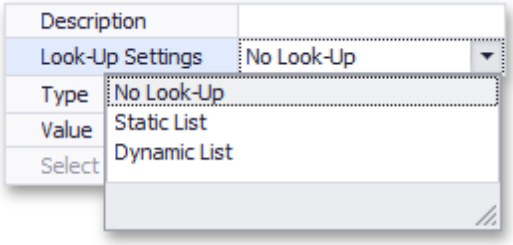
- **Name** - Specifies the parameter name. When creating and modifying parameter names, follow the rules below.
  - A name can contain letters, numbers and
  - underscores. A name cannot contain spaces.
  - A name cannot be an empty string.
  - The dashboard cannot contain parameters with the same name.
  - Names are case-sensitive. For example, you can create the names Param eter and PARAME TE R .
- **Description** - Specifies the parameter's description. The parameter's description is the value displayed in the **Parameter Name** column of the Dashboard Parameters dialog.
- **Look-Up Settings** - Specifies the parameter's look-up editor settings.
- **Select All Values** - Specifies whether or not all parameter values should be selected in the initial state of the Dashboard Viewer.

  Note that this option is in effect when **Allow Multiselect** is set to **true**.
- **Type** - Specifies the parameter type.
- **Value** - Specifies the default parameters value. Note that when **Allow Multiselect** is set to **true**, the

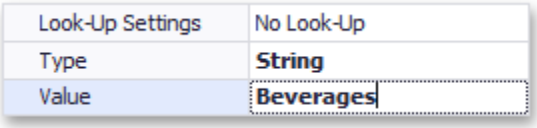
  Value option allows you to select multiple parameter values. Then, click **OK** to add the created parameters to the dashboard.

Look-Up Editor Settings

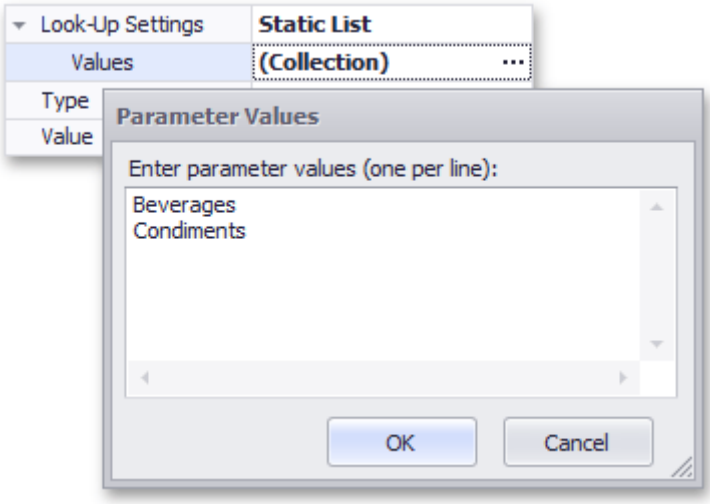
There are three types of look-up editor settings that can be specified for a parameter. Select the required type from the **LookUpSettings** drop-down list.



- **No Look-Up** - set the **Value** to use a static value as a parameter.

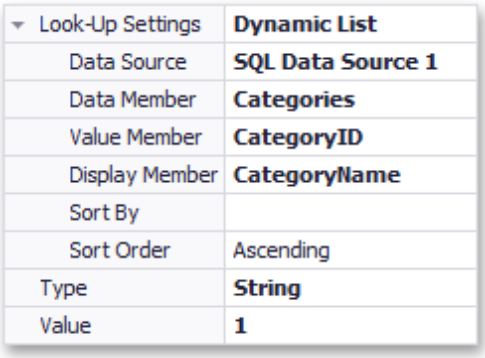


- **Static List** - click the ellipsis button to add static values for the current dashboard parameter.



In this case, the **Value** specifies the default parameter's value.

- **Dynamic List** - allows you to use a list of values from the existing data source as a parameter. You need to select the required **Data Source** from the list of available data sources and data members for the dashboard parameter's display name and value, respectively.



.1.First, select the required **Data Source** from the list of available data sources. For the SQL data source, select the required **Data Member** that specifies the query from the selected **Data Source**.

.2.Then, specify data members for the dashboard parameter's value and display name using **Value Member** and **Display Member**, respectively.

.3.If necessary, specify the data member used to sort parameter values using the **Sort By** option. **Sort Order** specifies the required sort order.

Note

To learn how to create a data source for a dashboard parameter, see Providing Data.

See Also

Passing Parameter Values Requesting Parameter Values

Passing Parameter Values

In this topic, you will learn how to pass parameter values to a dashboard.

- Filtering
- Conditional
- Formatting

  Calculated Fields
- Window Calculations

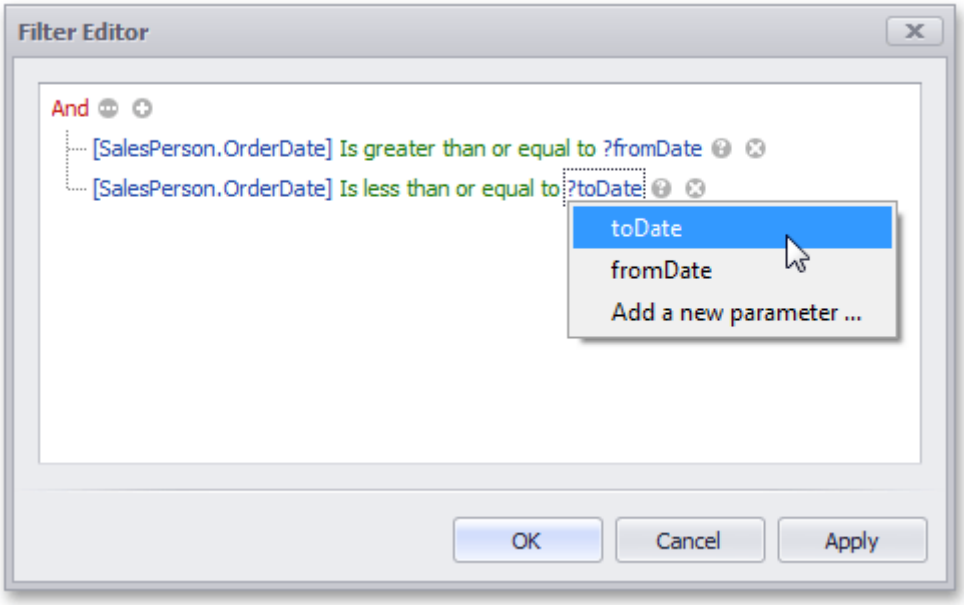
Filtering

You can filter the specified query or apply filtering to a specific dashboard item according to the current parameter value(s) using the Filter Editor.

In the Filter Editor, you can compare a field value with the following objects.

- A static value (represented by the icon). Click this button to switch to the next item mode ("another field value"), to compare the field value with another field value.
- Another field value (represented by the icon). Click this button to switch to the next item mode (parameter value), to compare the field value with a parameter value.
- A parameter value (represented by the icon). Click this button to switch back to the initial mode ("static value"), to compare the field value with a static value.

Thus, to compare a field value with a parameter value, click the button, then click the button.



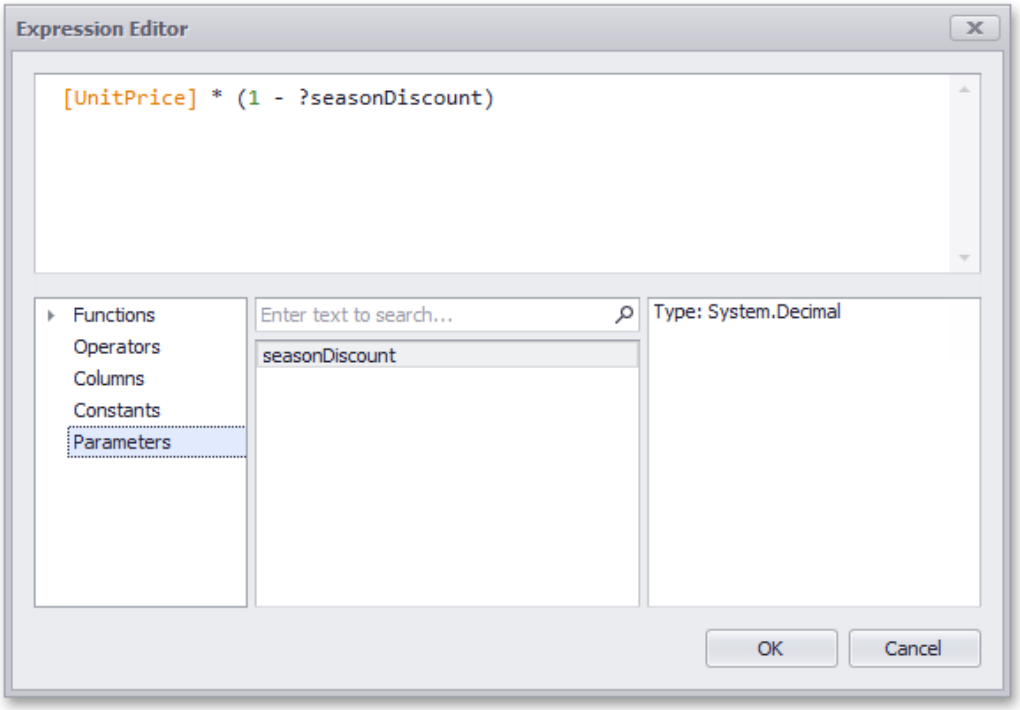
Conditional Formatting

You can apply conditional formatting to a specific dashboard item according to the current parameter value when creating the Expression format condition. In the **Expression** dialog, you can compare a field value with parameter values in the same manner as in the **Filter Editor** dialog.

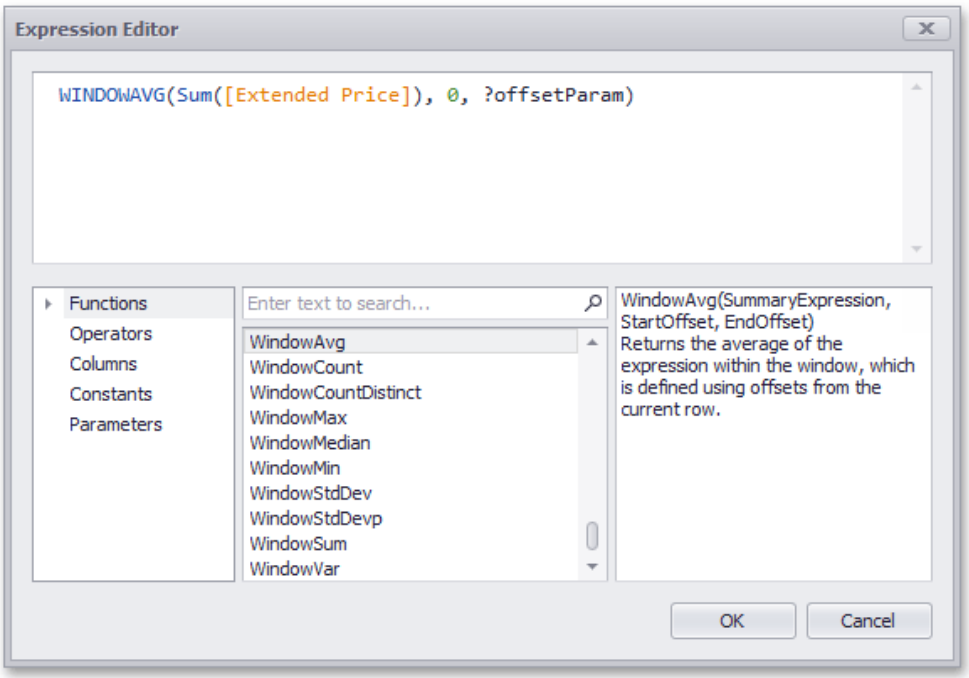
Calculated Fields

You can use parameters when constructing expressions for calculated fields. This allows you to dynamically evaluate values of the calculated field depending on the current parameter value.

To include the required parameter in the calculated field expression, click **Parameters** in the Expression Editor dialog and double-click the required parameter.



Window Calculations



You can use parameters when customizing expressions for window calculations. This allows you to apply a calculation dynamically, depending on the current parameter value.

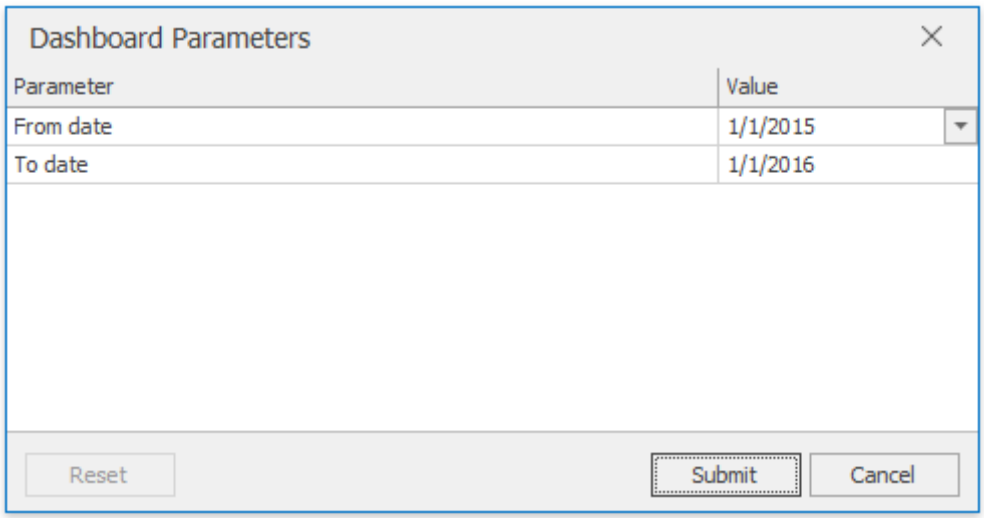
See Also

Creating Parameters
Requesting Parameter Values
Creating Calculated Fields

Requesting Parameter Values

The BI Dashboard provides a built-in Dashboard Parameters dialog, which provides the capability to change dashboard parameter values. This dialog is created automatically, depending on the parameter type and visibility settings.

To invoke the Dashboard Parameters dialog in the Dashboard Designer, click the Parameters ( ) button in the dashboard title. Depending on the visibility state of the created dashboard parameters, this invokes the following dialog.



Select the required parameter values in the **Dashboard Parameters** dialog and click the **Submit** button to apply the changes.

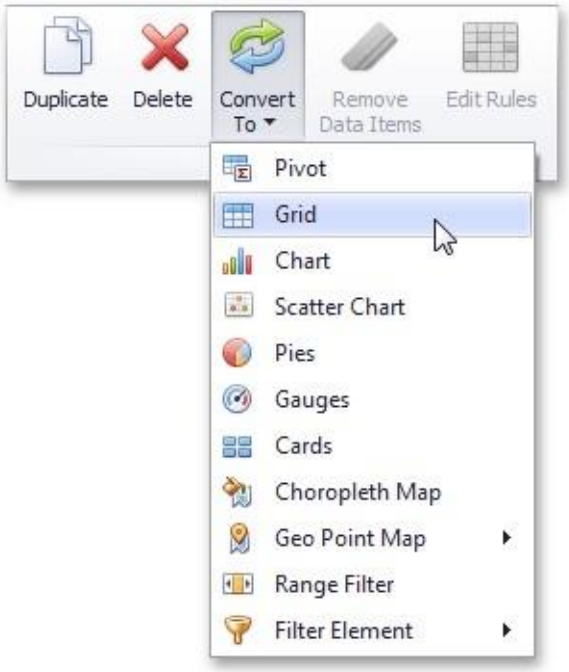
To reset the changes to the default values, click the **Reset** button.

See Also

Creating Parameters
Passing Parameter Values

Converting Dashboard Items

The BI Dashboard Designer provides the capability to convert data-bound dashboard items to another type. To convert the selected dashboard item to another type, use the Convert button in the ribbon's Home tab or the corresponding command in the item's context menu.



The BI Dashboard Designer always preserves the following settings for data-bound dashboard items.

- The set of data items used to bind the dashboard item to
- data. Data shaping settings of data items and their names.
- A custom name displayed within the dashboard item caption.

The following settings are kept if the dashboard item is being converted to an item that also supports this feature.

- Master Filtering settings (e.g., the specified master filter mode) and Drill-Down settings (e.g., the target dimension).
- Conditional Formatting
- settings. Coloring settings.
- Calculation settings.

For different types of dashboard items, some specific settings can be preserved. For example, the following settings are preserved.

- Legend settings for the Chart/Scatter Chart dashboard
- items. Series types for the Chart/Range Filter
  dashboard items.
- Element arrangement settings for the Pie/Card/Gauge dashboard items.
- Caption settings for the Pie/Gauge dashboard items.
- Navigation settings for Choropleth Map/Geo Point Maps.
- The attribute whose values are displayed within shape titles for Choropleth Map/Geo Point
- Maps. Legend settings for the Choropleth Map/Geo Point Maps.
- Clustering settings for Geo Point Maps.

Dashboard Layout

This section describes the features related to the Dashboard layout.

The section consists of the following topics.

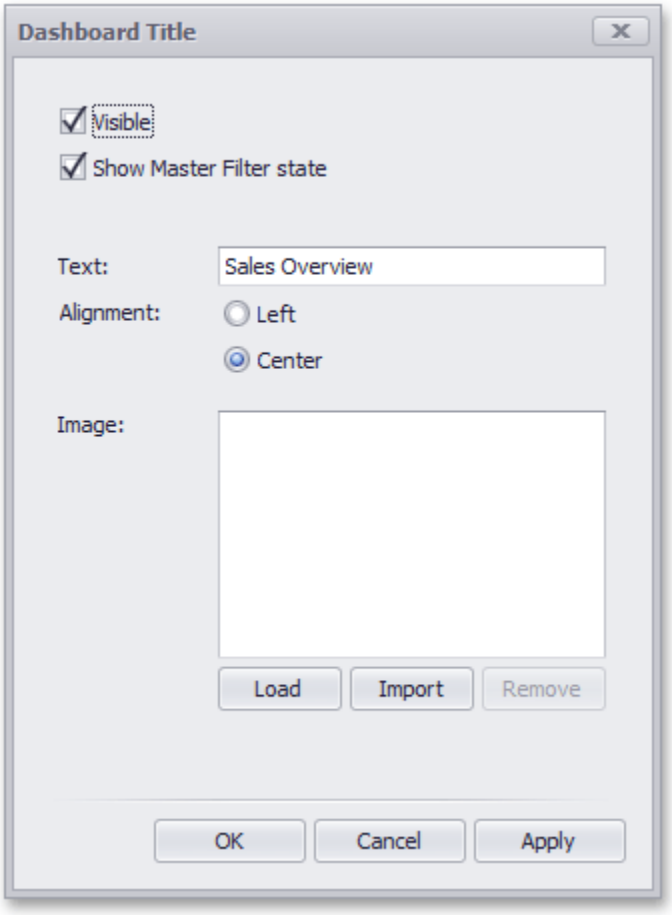
- Dashboard Title
- Dashboard Item
- Caption Dashboard Items Layout

Dashboard Title

The **Dashboard Title** is located at the top of the dashboard surface. It can contain text or image content.

If you are using the Ribbon menu in the **Dashboard Designer**, you can change title settings by clicking the **Title** button.

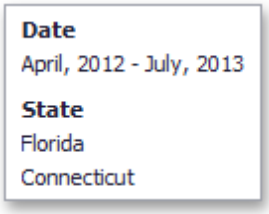
This invokes the **Dashboard Title** dialog, which allows you to change the text within the dashboard title, add an image, etc.



This dialog allows you to specify the following options.

- **Visible** - Specifies whether or not the dashboard title is visible.
- **Show Master Filter state** - Specifies whether or not to show the state of master filter items in the dashboard title.

  When you hover over the filter icon ( ), all master filters applied to the dashboard are displayed in the invoked popup.

- **Alignment** - Specifies the alignment of the dashboard title.
- **Load** button - Allows you to specify the image displayed within the dashboard title. In this case, the dashboard definition will contain the URL to access the image.
  Import button - Allows you to specify the image displayed within the dashboard title. In this case, the dashboard definition will contain an image as a byte array.

The dashboard title can contain command buttons.

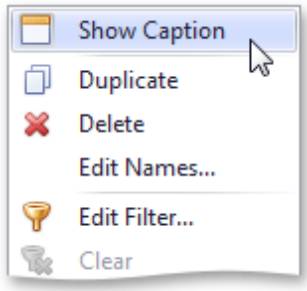
- **Export To** button - allows you to print/export the dashboard. To learn more about printing and exporting, see the Printing and Exporting topic.
- **Parameters** button - allows you to modify dashboard parameter values. To learn more about parameters, see the Using Dashboard Parameters topic.

Dashboard Item Caption

Each dashboard item has a caption that is displayed at the top of the item. The caption contains static text along with other information, as well as command buttons.

To show or hide the caption of a dashboard item, click the **Show Caption** button in the **Design** Ribbon tab...

...or right-click the item when designing the dashboard and click the **Show Caption** menu item.



Note

The caption of the Range Filter dashboard item is not visible by default.

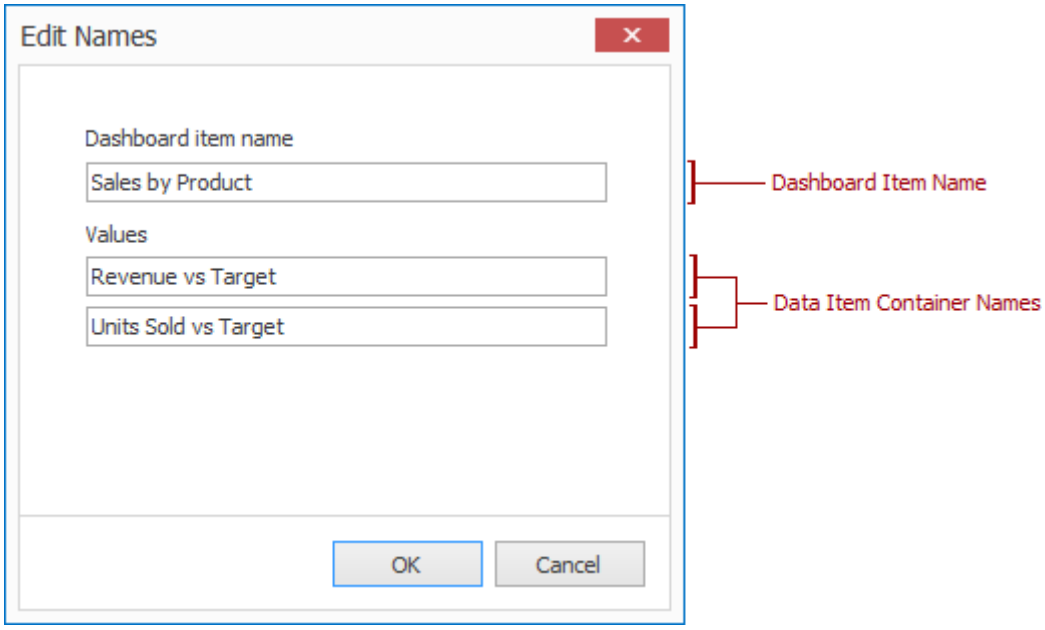
The caption of the Dashboard item contains the following information and buttons, depending on the dashboard item type:

Dashboard Item Name - represents the static text within a dashboard item's caption.

Data Item Container Name - represents the name of the data item container. To learn more about data

item containers, see the Providing Data topic for the corresponding dashboard item.

You can change the default name of the dashboard item or data item container using the Edit Names dialog. To invoke this dialog, right-click the item when designing the dashboard, and click the Edit Names... menu item (alternatively, you can use the Edit Names button in the Design Ribbon tab).

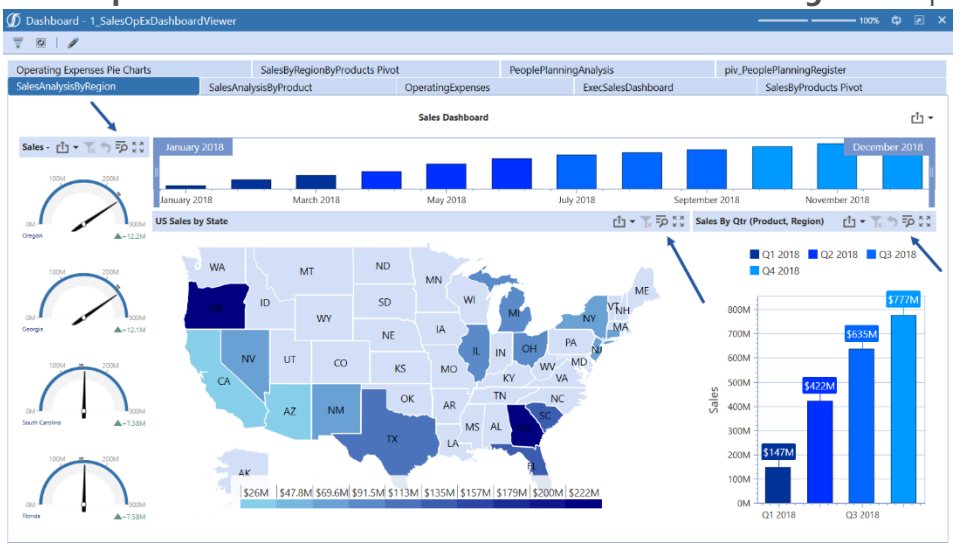


- **Drill-Down** value - shows the value or values from the current drill-down hierarchy. To learn more, see the Drill-Down topic.
- **Export to** button - allows you to print or export a dashboard item. To learn how to print individual dashboard items, see the Printing and Exporting topic.
- **Values** button - invokes a drop-down menu that allows you to switch between the provided values (in the pie, card, gauge and map dashboard items). To learn more, see the **Providing Data** topic for the corresponding dashboard item.
- **Clear Master Filter** button - allows you to reset filtering when a dashboard item acts as the Master Filter. To learn more, see the **Master Filtering** topic in the **Interactivity** section for the corresponding dashboard item.
- **Drill Up** button - allows you to return to the previous detail level when the drill-down capability is enabled for this item. To learn more, see the **Drill-Down** topic in the **Interactivity** section for the corresponding dashboard item.

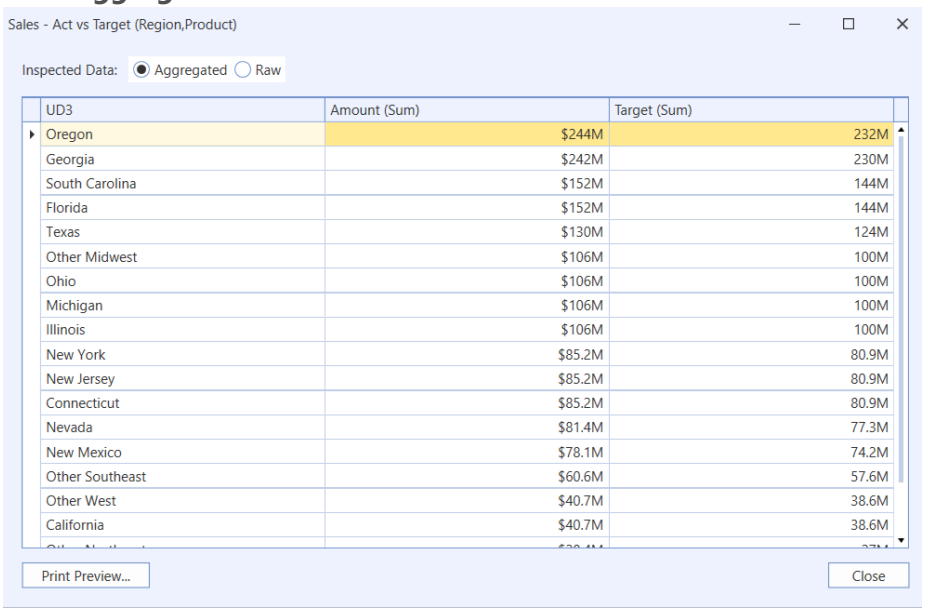
Inspect Data

You can review your underlying data from your visualization in an aggregated or raw data view and create quick reports which can be exported to multiple formats.

1. Click **Inspect Data** from a **Dashboard** or from the **BI Designer** to open the Data Inspector window.

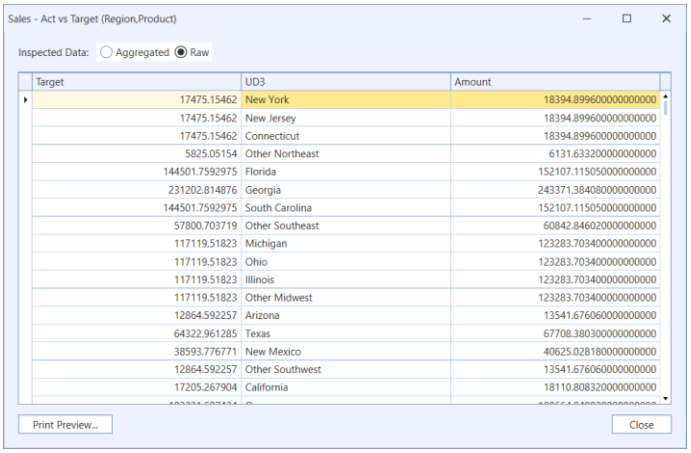


2. Click **Aggregated** to review the data that is retrieved from the dashboard item's data.



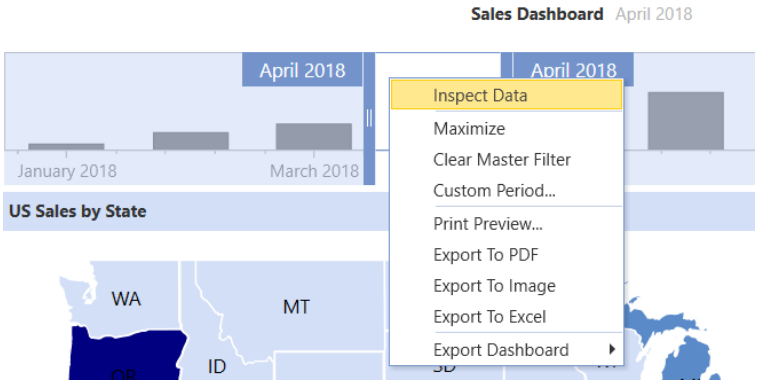
UD3	Amount (Sum)	Target (Sum)
Oregon	$244M	232M
Georgia	$242M	230M
South Carolina	$152M	144M
Florida	$152M	144M
Texas	$130M	124M
Other Midwest	$106M	100M
Ohio	$106M	100M
Michigan	$106M	100M
Illinois	$106M	100M
New York	$85.2M	80.9M
New Jersey	$85.2M	80.9M
Connecticut	$85.2M	80.9M
Nevada	$81.4M	77.3M
New Mexico	$78.1M	74.2M
Other Southeast	$60.6M	57.6M
Other West	$40.7M	38.6M
California	$40.7M	38.6M

3. Click **Raw** to review the data from the dashboard item's underlying data.



Target	UD3	Amount
17475.15462	New York	18394.899600000000000
17475.15462	New Jersey	18394.899600000000000
17475.15462	Connecticut	18394.899600000000000
5825.05154	Other Northeast	6131.633200000000000
144501.7592975	Florida	152107.115050000000000
231202.814876	Georgia	243371.384080000000000
144501.7592975	South Carolina	152107.115050000000000
57800.703719	Other Southeast	60842.846020000000000
117119.51823	Michigan	123283.703400000000000
117119.51823	Ohio	123283.703400000000000
117119.51823	Illinois	123283.703400000000000
117119.51823	Other Midwest	123283.703400000000000
12864.592257	Arizona	13541.676060000000000
64322.961285	Texas	67708.380300000000000
38593.776771	New Mexico	40625.028180000000000
12864.592257	Other Southwest	13541.676060000000000
17205.267904	California	18110.808320000000000

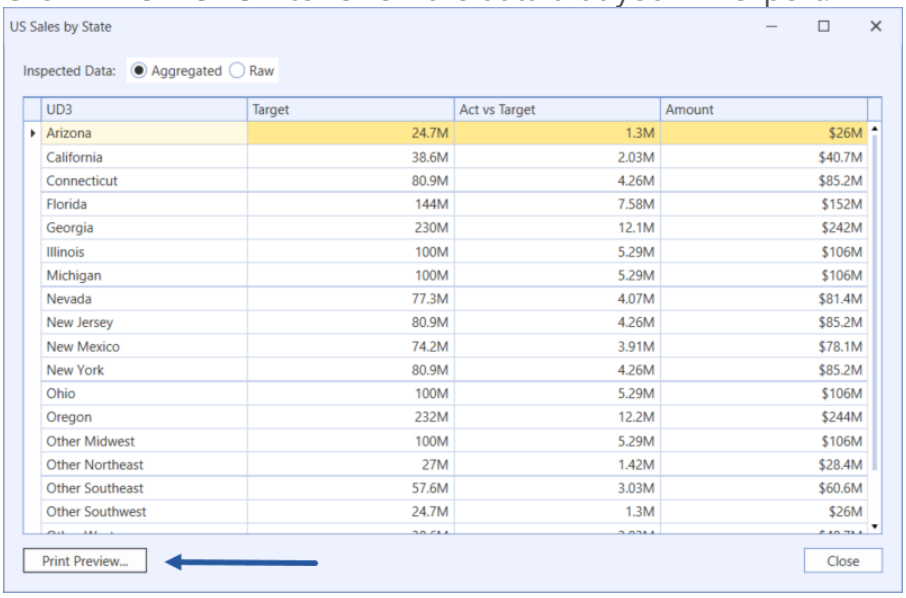
4. You can also right-click for the **Inspect Data** menu option.



Export Data

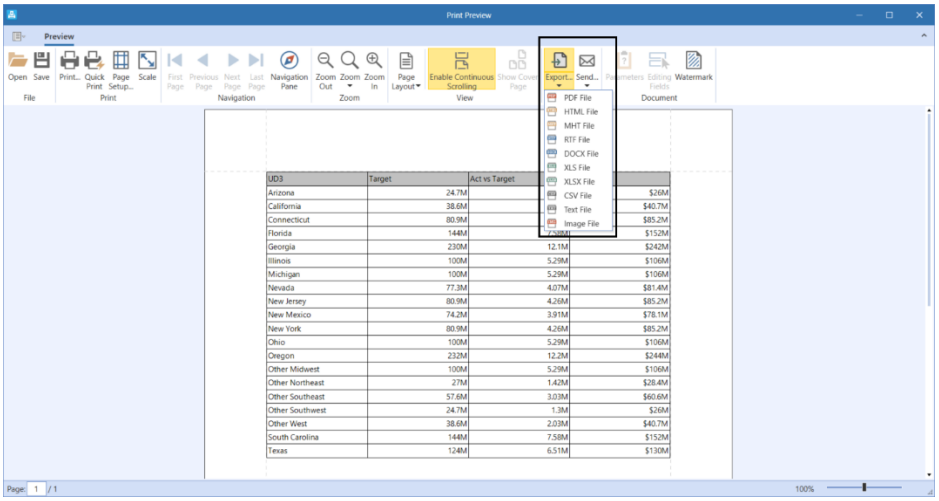
You can export data to different formats.

1. Click **Print Preview** to review the data that you will export.



UD3	Target	Act vs Target	Amount
Arizona	24.7M	1.3M	$26M
California	38.6M	2.03M	$40.7M
Connecticut	80.9M	4.26M	$85.2M
Florida	144M	7.58M	$152M
Georgia	230M	12.1M	$242M
Illinois	100M	5.29M	$106M
Michigan	100M	5.29M	$106M
Nevada	77.3M	4.07M	$81.4M
New Jersey	80.9M	4.26M	$85.2M
New Mexico	74.2M	3.91M	$78.1M
New York	80.9M	4.26M	$85.2M
Ohio	100M	5.29M	$106M
Oregon	232M	12.2M	$244M
Other Midwest	100M	5.29M	$106M
Other Northeast	27M	1.42M	$28.4M
Other Southeast	57.6M	3.03M	$60.6M
Other Southwest	24.7M	1.3M	$26M

2. Click **Export** and choose the format. For example, if you want to see the data in Excel, click **XLS File**.

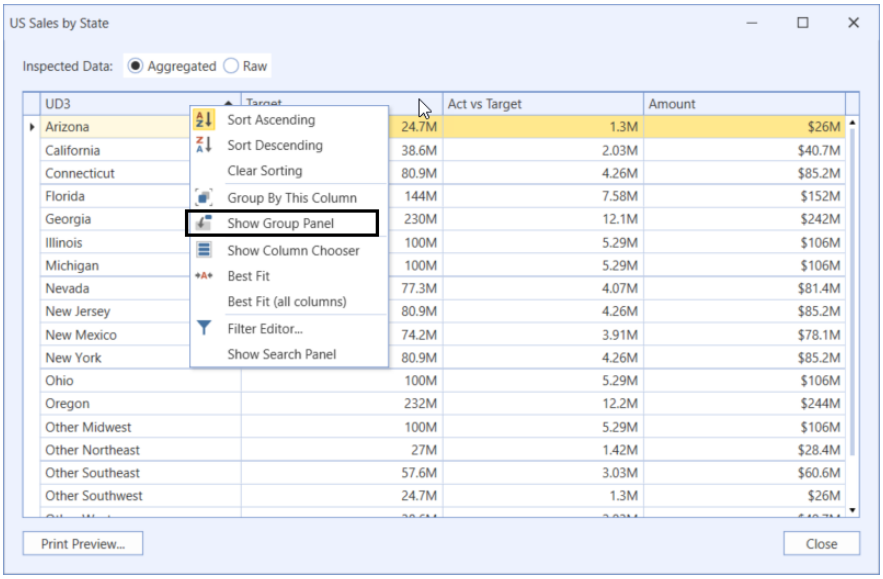


3. The results show in Excel.

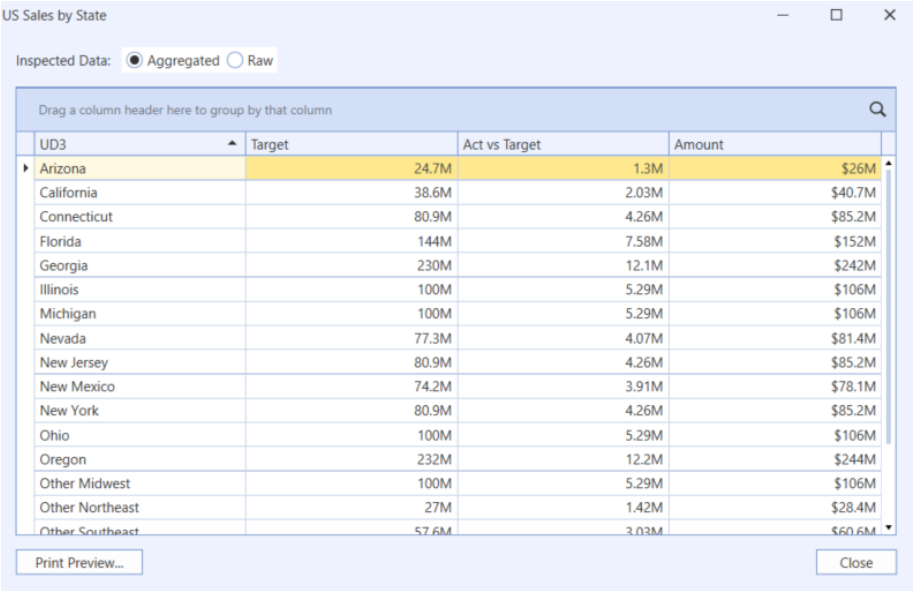
	A	B	C	D	E
1	UD3	Target	Act vs Target	Amount	
2	Arizona	24739641.2	1302086.379	26041727.58	
3	California	38644876.22	2033940.854	40678817.08	
4	Connecticut	80945081.48	4260267.446	85205348.93	
5	Florida	143939323.8	7575753.885	151515077.7	
6	Georgia	230302918.1	12121206.22	242424124.3	
7	Illinois	100489093.3	5288899.646	105777992.9	
8	Michigan	100489093.3	5288899.646	105777992.9	
9	Nevada	77289752.44	4067881.708	81357634.15	
10	New Jersey	80945081.48	4260267.446	85205348.93	
11	New Mexico	74218923.61	3906259.138	78125182.75	
12	New York	80945081.48	4260267.446	85205348.93	
13	Ohio	100489093.3	5288899.646	105777992.9	
14	Oregon	231869257.3	12203645.12	244072902.5	
15	Other Midwest	100489093.3	5288899.646	105777992.9	
16	Other Northeast	26981693.83	1420089.149	28401782.98	
17	Other Southeast	57575729.52	3030301.554	60606031.08	
18	Other Southwest	24739641.2	1302086.379	26041727.58	
19	Other West	38644876.22	2033940.854	40678817.08	
20	South Carolina	143939323.8	7575753.885	151515077.7	
21	Texas	123698206	6510431.896	130208637.9	
22					

Group Data

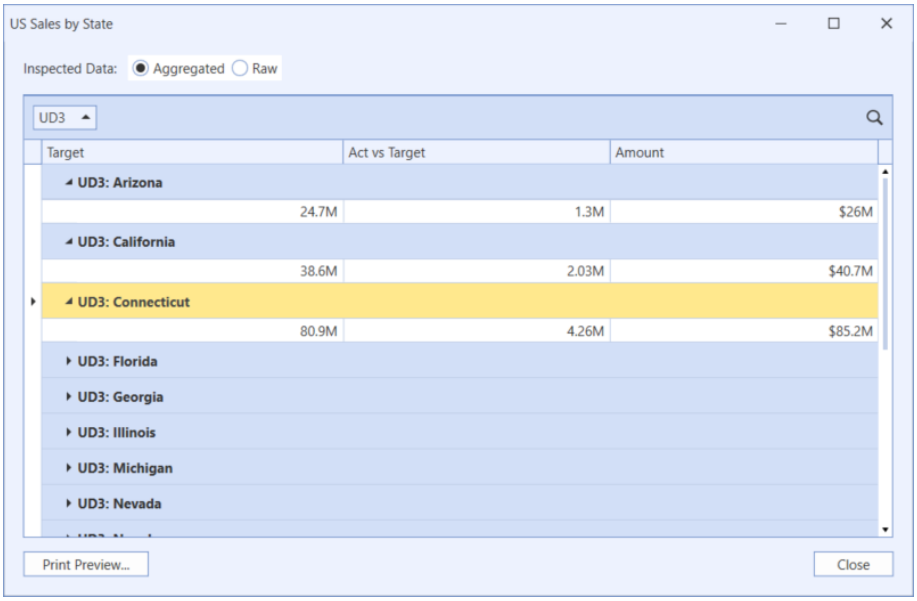
1. Right-click and choose **Show Group Panel**.



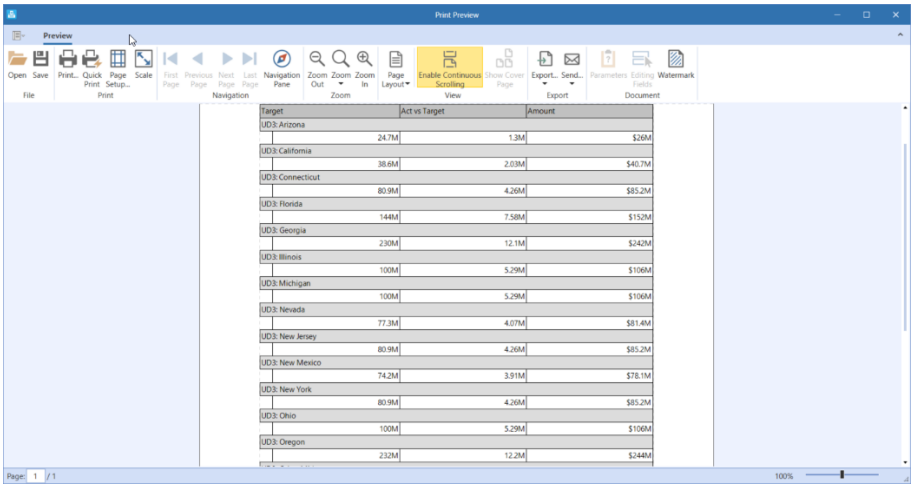
2. You can drag and drop your column groups into the header.



3. Giving you different ways to visualize your data.

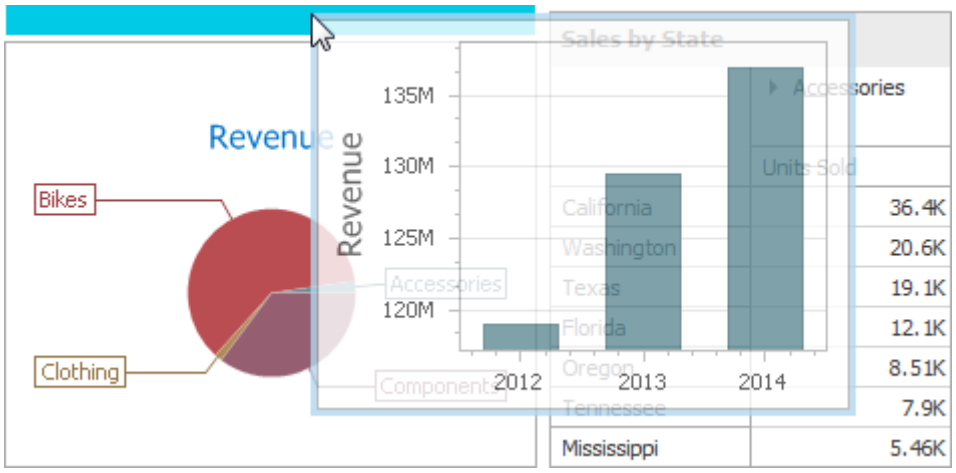


4. You can also filter, move columns, and hide columns.
5. Click **Print Preview** to see your results.



BI Dashboard Items Layout

The BI Dashboard Designer provides the capability to arrange and resize dashboard items and groups in various ways, using simple drag-and-drop operations.



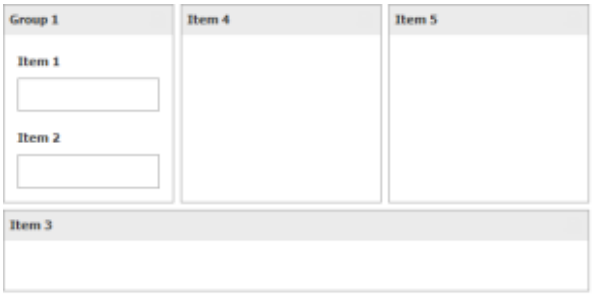
- Layout
- Concepts
- Item
  Resizing
  Item
  Positioning

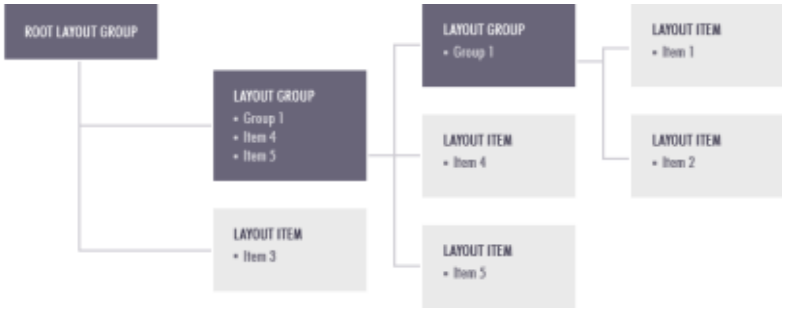
Layout Concepts

The dashboard arranges dashboard items and groups using layout items and layout groups. They are special containers that are used to present a dashboard layout as a hierarchical structure.

- A layout item is used as a container that displays an individual dashboard item.
- A layout group is used as a container that is used to arrange layout items (or other layout groups) either horizontally or vertically. At the same time, layout groups are used as containers that display dashboard item groups.

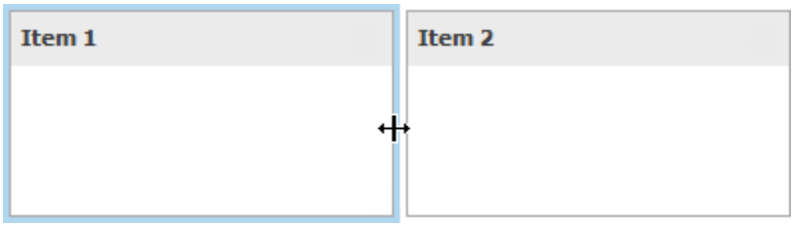
Thus, a dashboard layout is hierarchically arranged from the root layout group to bottommost layout items, which display individual dashboard items.



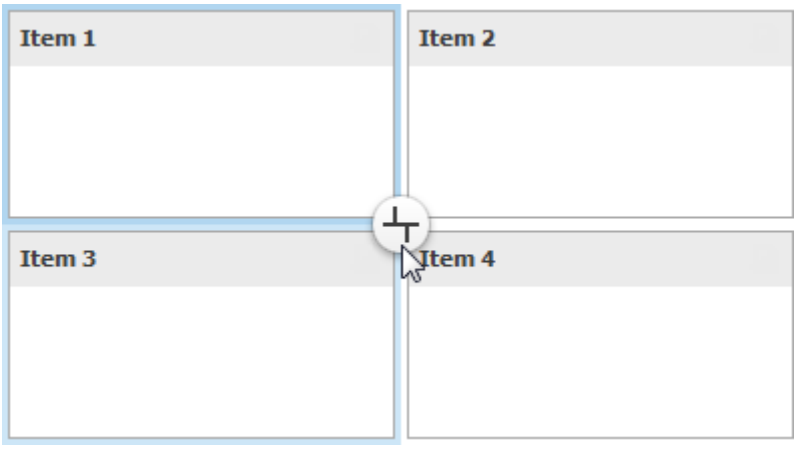


Item Resizing

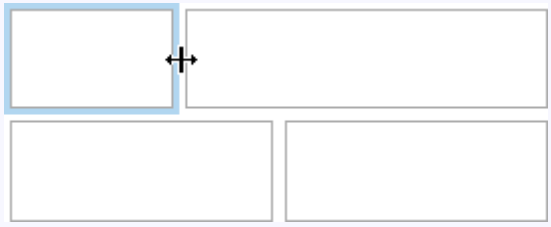
You can resize individual items/groups of items by dragging their edges.



By default, a 2x2 layout group of dashboard items is horizontally oriented and contains two child layout groups. This arranges dashboard items in two 'columns' and allows you to set a different height for items in different columns. You can switch the orientation of the 2x2 group to Vertical using the indicator at the group intersection.



This allows you to specify different widths for dashboard items in different 'rows'. The table below lists and describes different modes.

Indicator	Result	Description
		Orients the layout group horizontally and allows you to change the height of individual items and the width of 'columns'.
		Orients the layout group vertically and allows you to change the width of individual items and the height of 'rows'.

Item Positioning

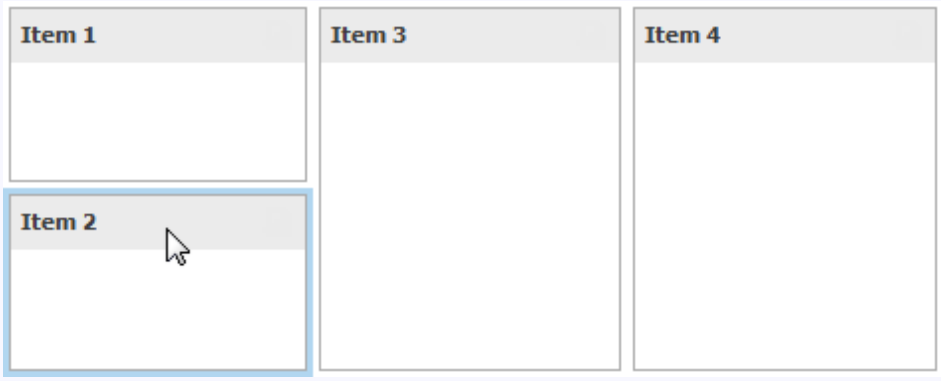
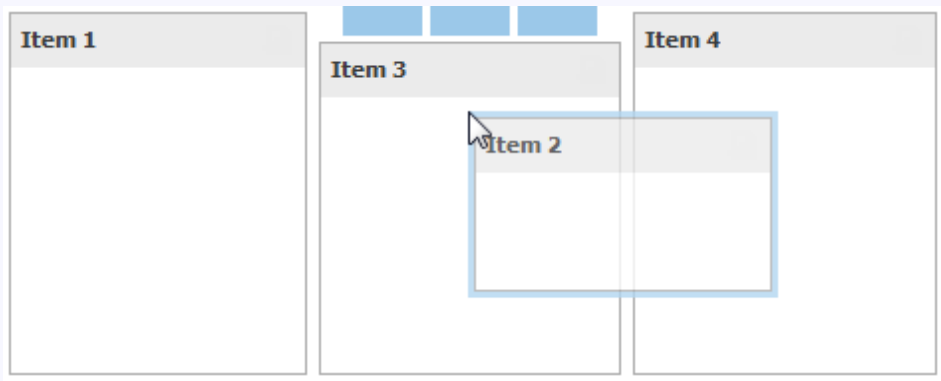
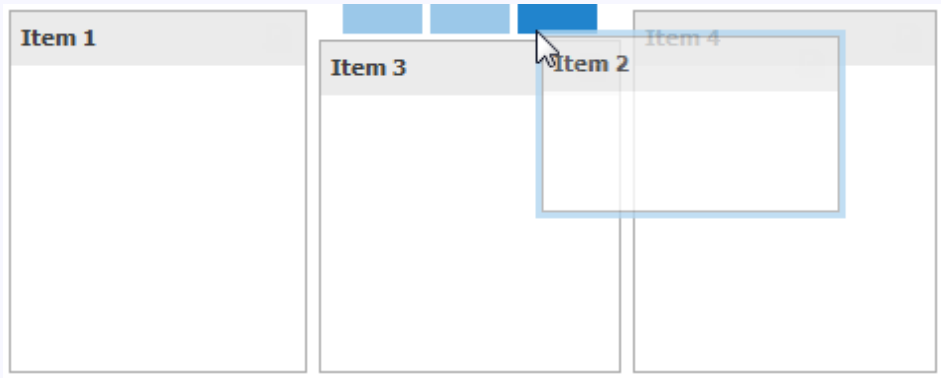
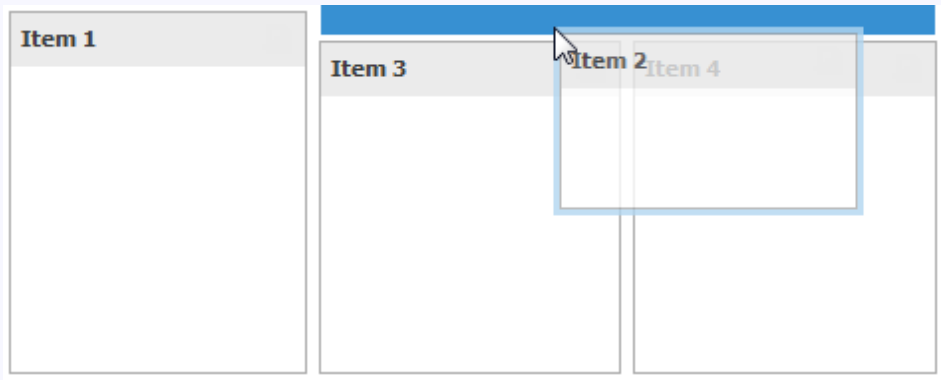
You can change the position of a dashboard item by using drag-and-drop and one of the following approaches.

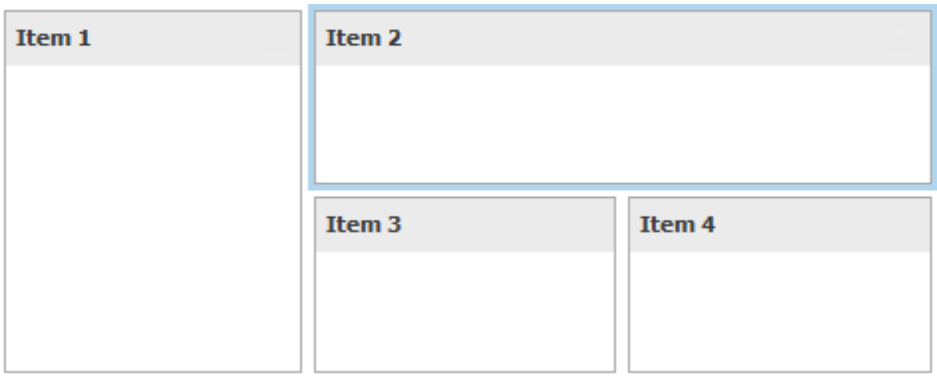
- If the caption of the dashboard item is visible, click it and hold down the left mouse button while dragging the item.
- If the caption of the dashboard item is not visible, click the icon in the top left corner, and hold down the left mouse button while dragging the item.

Depending on the required dashboard item position, a new layout group is created (if required) to maintain the arrangement of items. Thus, the dashboard item can be inserted to the desired area of a new or existing dashboard layout group.

The following table illustrates how a dashboard item is dragged.

Action	Description

	Select the required dashboard item.
	Drag the dashboard item to the expected area. The drag in dicator ( ) will show possible positions for the dashboard item.
	Move the mouse cursor to the required position. The drop in dicator ( ) highlights the hovered position.
	Then, the drop in dicator sequentially displays areas that can be occupied by the dashboard item. Release the left mouse button when the drop indicator displays the required area.

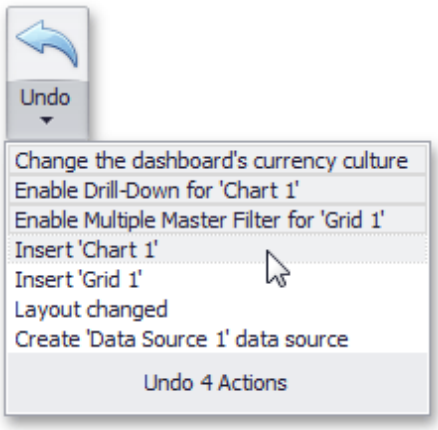


The dashboard item is moved to a new position.

The **Dashboard Designer** keeps track of all user actions, and allows you to undo or repeat them using the **Undo**/ **Redo** buttons.

To undo/redo the last action, use the following buttons.

To undo/redo several actions at once, click the arrow next to **Undo**/**Redo** button and select the actions in the list that you want to undo/redo.

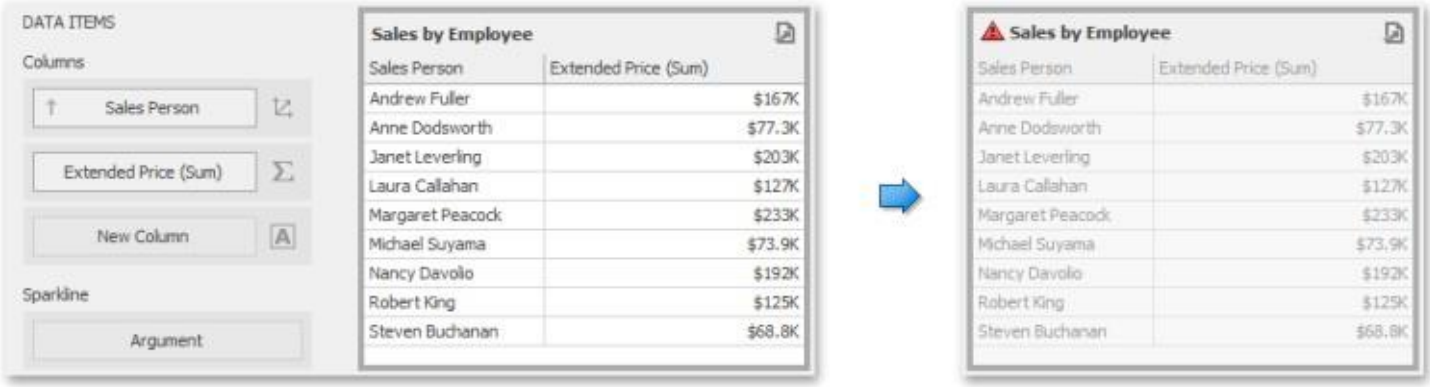


Automatic and Manual Updates

When you perform a data-aware operation in the Dashboard Designer (for instance, change the binding of a specified dashboard item or apply filtering), the dashboard sends a query to a data source and updates itself automatically according to the returned data. If the dashboard is bound to a large data source, updating the dashboard according to each change can consume a significant amount of time. In this case, you can disable automatic updates and update the dashboard manually when needed.

Automatic updates are enabled by default and can be managed using the Automatic Updates button in the Home ribbon tab.

Click this button to disable automatic updates. In this case, the dashboard item will not be updated automatically according to each change. Imagine that you have a Grid dashboard item containing the dimension and measure columns. If you change the sort order of the Sales Pers on column or change the summary type of the E xten ded Price column, the Grid will be shaded and will display the ⚠ icon within its caption.



This indicates that this dashboard item requires the update to reflect changes. To update the Grid manually, click the **Update** button in the **Home** ribbon tab.

Note that the state of the **Automatic Updates** option is saved to the dashboard XML definition but affects only the Dashboard Designer.

Note

Note that automatic updates are disabled if you click the **Cancel** button on the loading panel when performing a time-consuming operation.

Printing and Exporting

The Dashboard Designer provides the capability to print or export an entire dashboard and individual items.

- Printing and Exporting Dashboards
- Printing and Exporting Dashboard Items

Printing and Exporting Dashboards

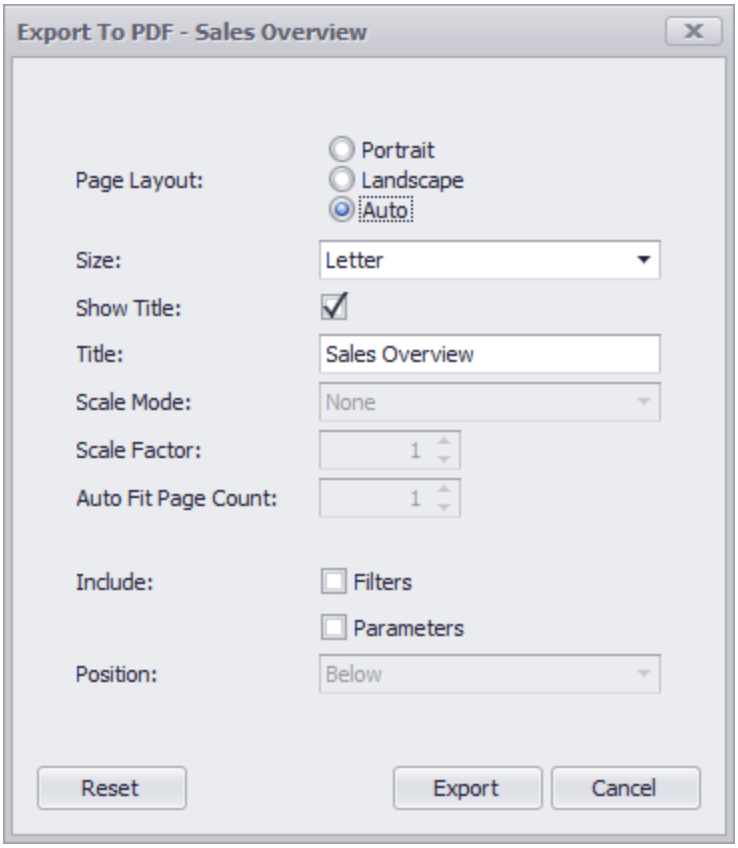
To print or export the entire dashboard, click the button in the dashboard title area and choose the required action.

Print Preview...

Allows you to customize the document before printing/exporting. For instance, the following settings can be changed: the orientation and size of the printed page, page margins, etc.

Export to PDF

Invokes a corresponding dialog that allows you to export a dashboard to a PDF file with specific options. The following options are available.



- **Page Layout** - Specifies the page orientation used to export a dashboard. You can select between Portrait
, Landscape, and Auto. Note that in the Auto mode, page orientation is selected automatically depending on the horizontal and vertical sizes of a dashboard.
- **Size** - Specifies the standard paper size (for instance, L etter or A4).
- **Show Title** - Specifies whether or not to apply the dashboard title to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Scale Mode** - Specifies the mode for scaling when exporting a dashboard.

Note that this option is in effect when **Page Layout** is set to a value different from Au to.

- **Scale Factor** - Specifies the scale factor (in fractions of 1) by which a dashboard is scaled.

This option is in effect if **Scale Mode** is set to U s e Scale F actor.

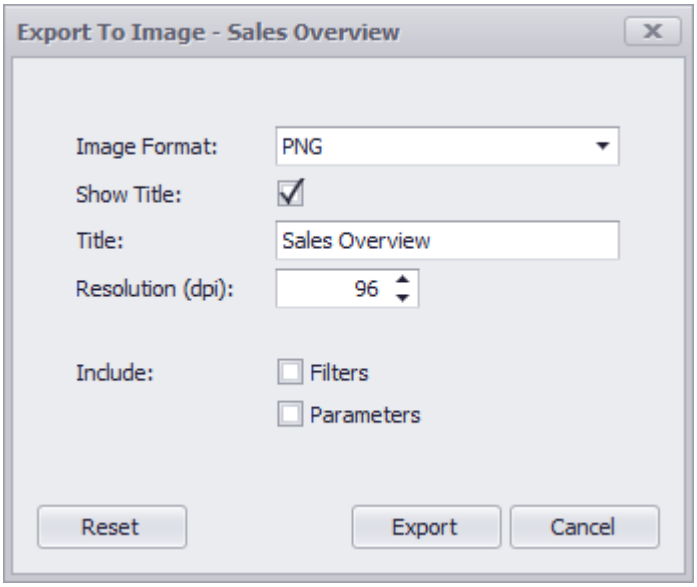
- **Auto Fit Page Count** - Specifies the number of horizontal/vertical pages spanning the total width/height of a dashboard.

This option is in effect if **Scale Mode** is set to Au to F it to Page W idth.

- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Export to Image

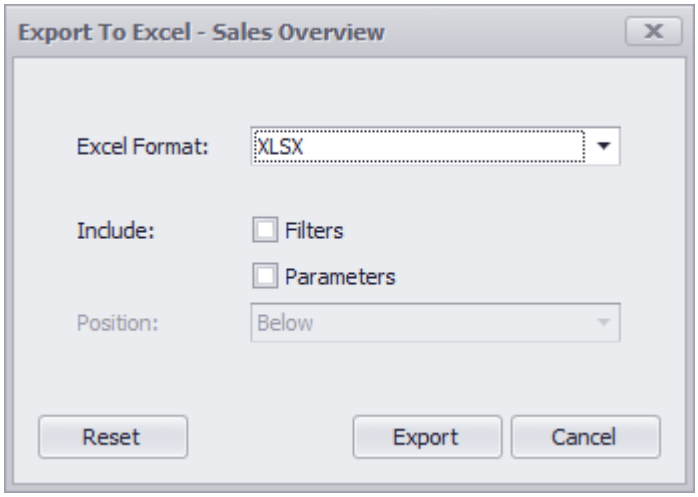
Invokes a corresponding dialog that allows you to export a dashboard to an image in the specified format. The following options are available.



- **Image Format** - Specifies the image format in which the dashboard is exported. The following formats are available: PN G, JPE G, and G IF.
- **Show Title** - Specifies whether or not to apply the dashboard title to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export a dashboard.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.

Export to Excel

Invokes a corresponding dialog that allows you to export dashboard's data to the Excel file. The following options are available:



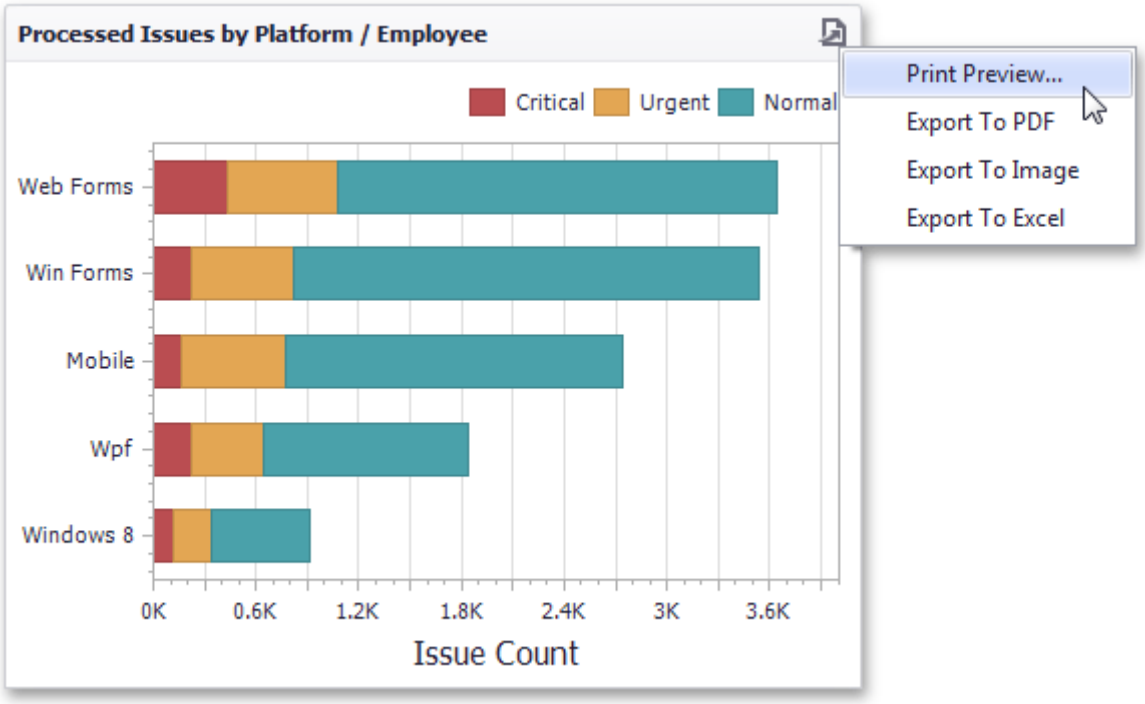
- **Excel Format** - Specifies the Excel workbook format in which the dashboard's data is exported. You can select between XLSX and XLS.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document.

You can select between Below and Separate Sheet.

Specify the required options in the invoked dialog and click the **Export** button to export the dashboard. To reset changes to the default values, click the **Reset** button.

Printing and Exporting Dashboard Items

To print or export a dashboard item, click the button in its caption and choose the required action.



- Print Preview... - Allows you to customize the document before printing/exporting.
- **Export to PDF** - Invokes a corresponding dialog that allows you to export a dashboard to a PDF file with specific options.
- **Export to Image** - Invokes a corresponding dialog that allows you to export a dashboard to image in the specified format.
- **Export to Excel** - Invokes a corresponding dialog that allows you to export a dashboard item's data to the Excel workbook or CSV file.

To learn more about printing/exporting specifics of different dashboard items, see the **Printing and Exporting**

topic for the required dashboard item.

UI Elements

The topics in this section describe the main elements of a BI **Dashboard Designer** application.

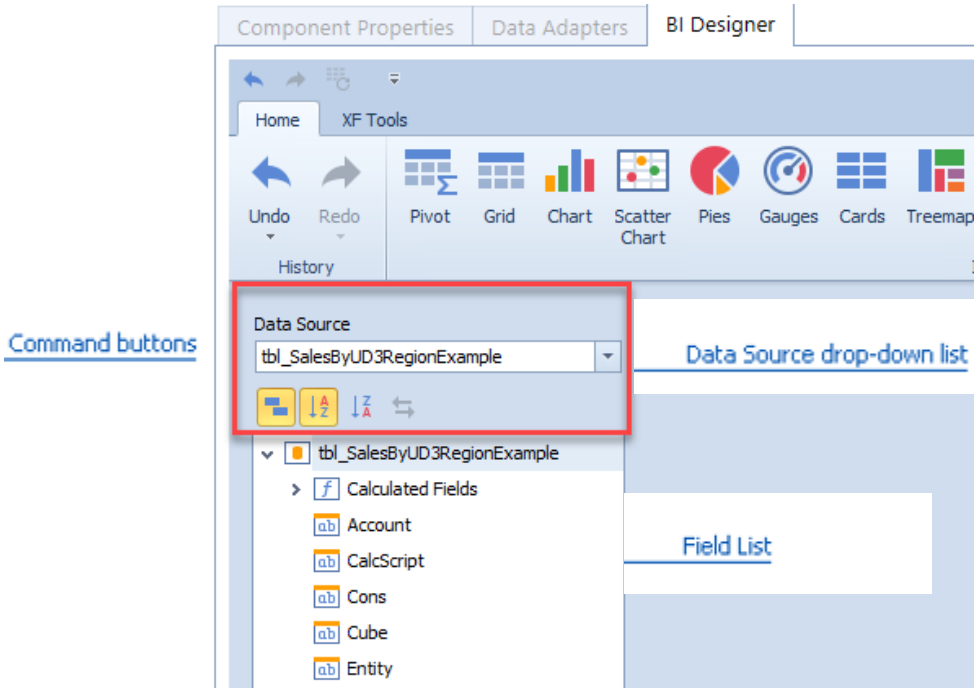
This section consists of the following topics.

- Data Source
- Browser Data
- Items Pane

Print Preview

Data Source Browser

The Data Source Browser allows you to navigate through dashboard data sources. It displays the data source structure and allows you to bind dashboard items to the required data source fields using drag-and-drop operations. The Data Source Browser also enables you to manage calculated fields.



The Data Source Browser contains the following elements.

- **Data Source** drop-down list - allows you to select the required data source.
- **Query/Data Member** drop-down list - allows you to select the required query or data member.
- The following **Command buttons** are available to sort and/or group fields in theData Source browser
- **Field List** displays data source fields. You can drag these fields to the data item placeholders to specify data binding.

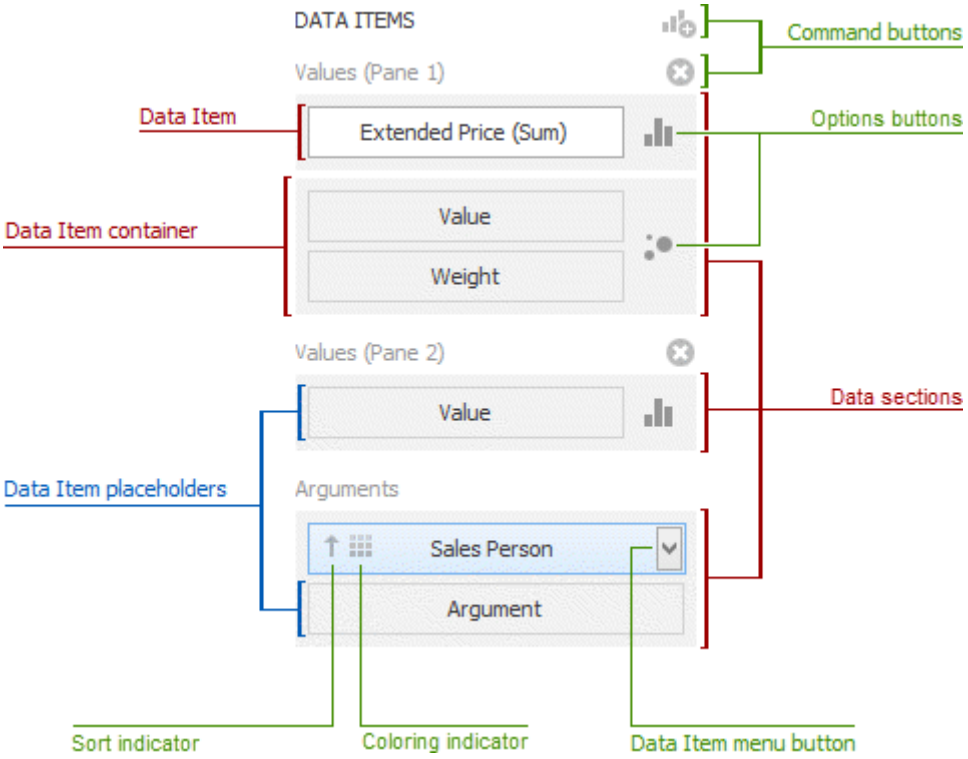
The Data Source Browser identifies the following data field types.

Icon	Description
	Boolean
	Byte
	Date-time
	Numeric
	String
	Calculated field

Data Items Pane

The DATA ITEMS pane is placed side-by-side with the Data Source Browser, and allows you to create and modify data binding using drag-and-drop operations.

To learn how to bind dashboard items to data source fields, see the Binding Dashboard Items to Data topic.



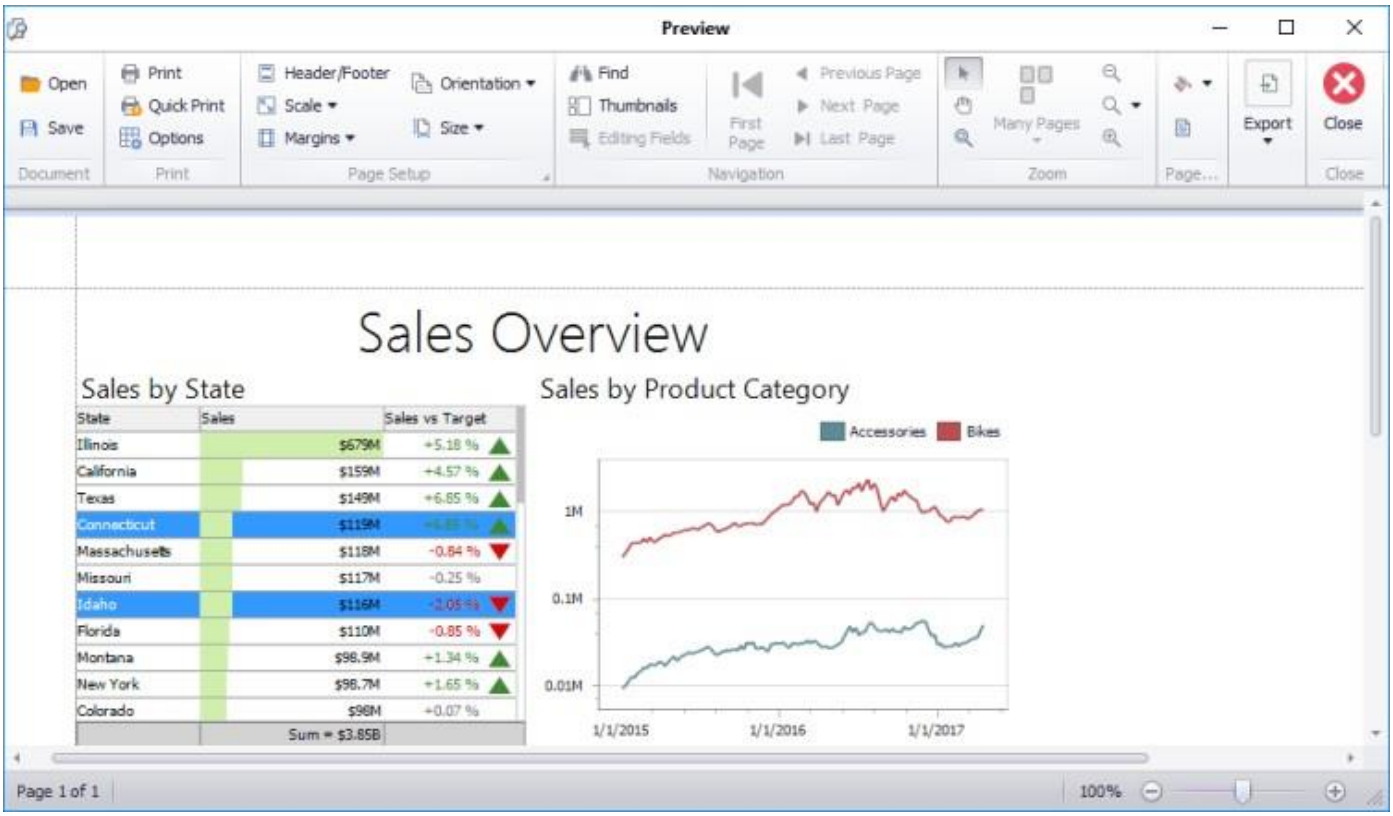
The DATA ITEMS pane can contain the following elements.

- **Data Item placeholder** - used to create a data binding using drag-and-drop operations.
- **Data Item** - identifies a data binding by mapping to a particular data source field. Each data item has the **Data Item menu** button, used to invoke a menu that allows you to perform various data shaping operations.
- **Data Section** - corresponds to a dashboard item area or element.
- **Data Item container** - used to provide data item sets (e.g., for calculating the difference between two measures). Data item containers have **Options** buttons that allow you to change specific dashboard item settings (e.g., to switch between chart series types or grid column types).
- **Sort indicator** - shows the current sort order for the data item.
- **Coloring indicator** - indicates whether coloring by hue is enabled for the data item.

Specific dashboard items have command buttons that allow you to perform various operations, for instance, to add a new pane to the chart dashboard item.

Print Preview

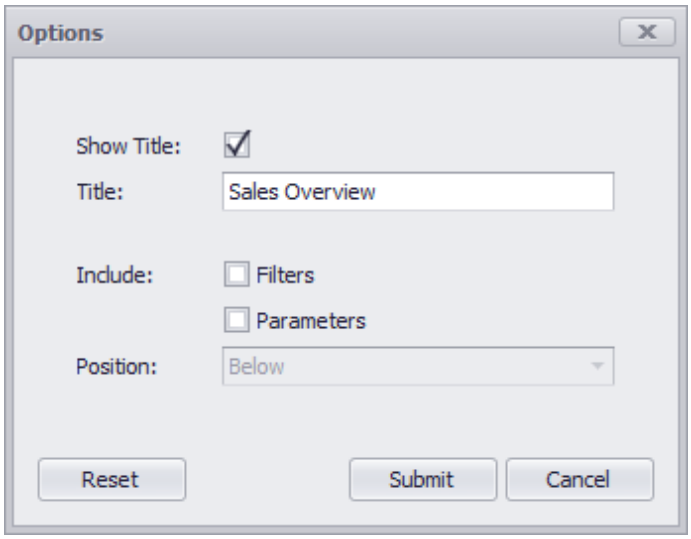
This document describes the Print Preview window, which displays the dashboard/dashboard item as it will appear on paper.



Specific Options

In the Print Preview, you can change the orientation and size of the printed page, specify the margins, scale the document, etc. To learn more, see Print Preview for WinForms.

You can also customize printing options specific to a dashboard/dashboard item. To do this, click the Options button in the Print group. When previewing the dashboard, the following Options dialog will be invoked.

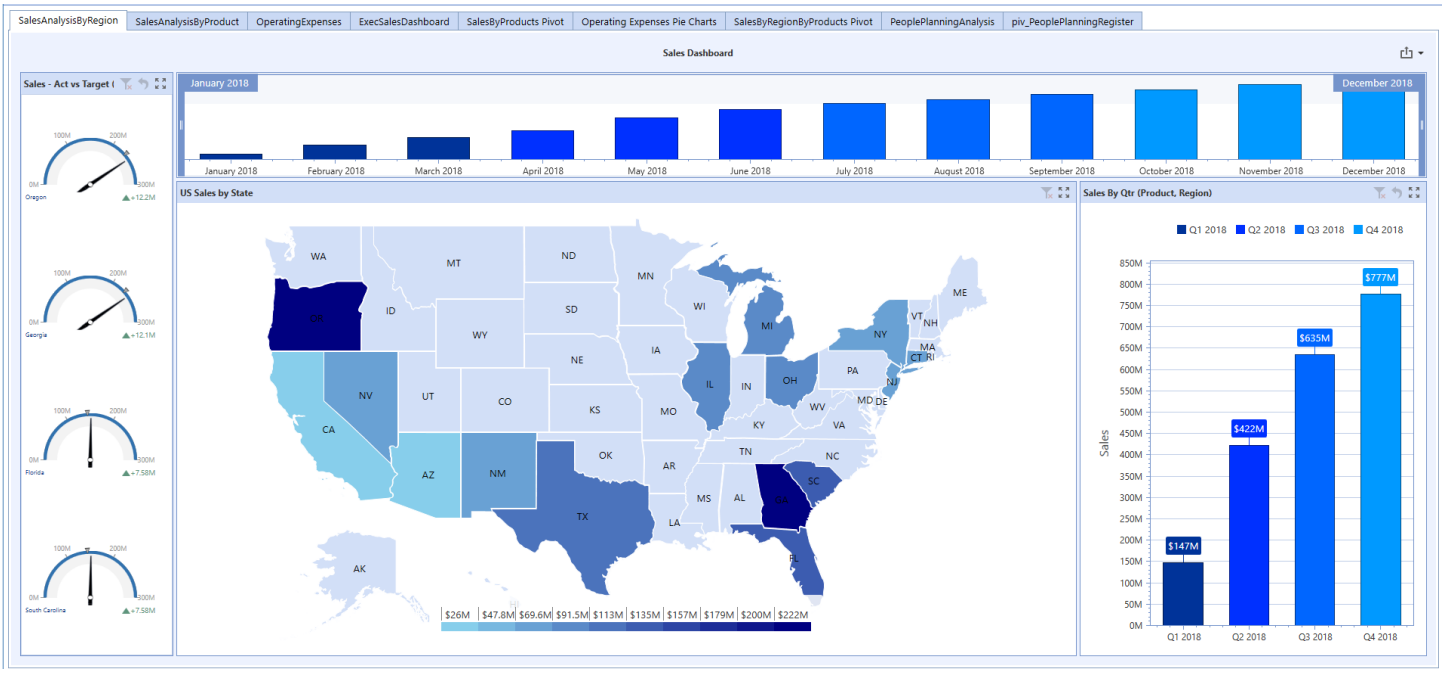


- **Show Title** - Specifies whether or not to show the dashboard title/dashboard item caption as the printed document title.
- **Title** - Specifies the title of the printed document.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

This dialog can contain different options, depending on the dashboard item. To learn more, see the documentation for the required dashboard item.

BI Dashboard Viewer

The BI Dashboard Viewer provides the capability to display dashboards at runtime.



Data Presentation

The topics in this section provide information on how the **Dashboard Viewer** presents data.

- Data Presentation
- Basics Master Filtering
- Drill-Down
- Dashboard Layout

Dashboard Parameters

This topic describes how to change dashboard parameter values.

- Requesting Parameter Values

Printing and Exporting

A Dashboard Viewer provides the capability to print or export both individual items of a dashboard, as well as the entire dashboard.

- Printing and Exporting

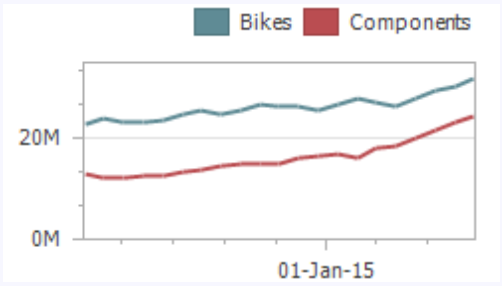
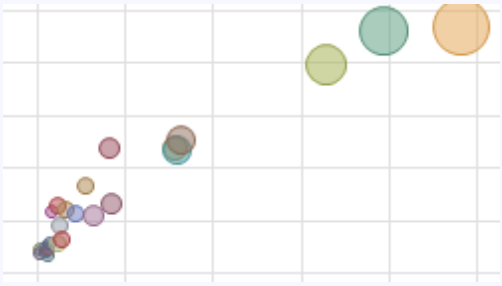
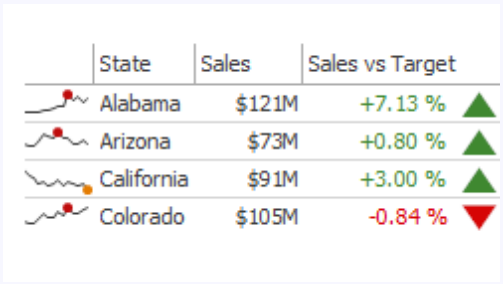
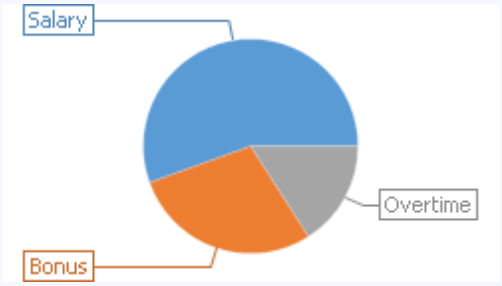
Dashboard Items

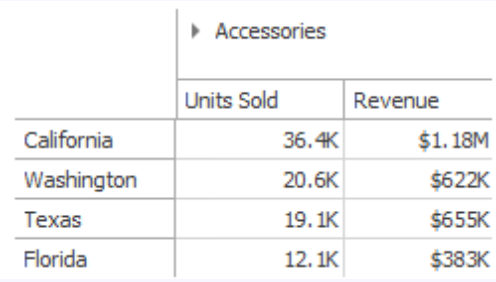
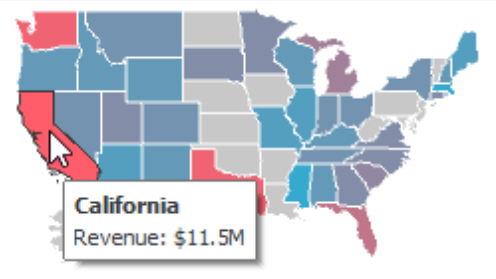
Dashboard items are used to present information in various ways.

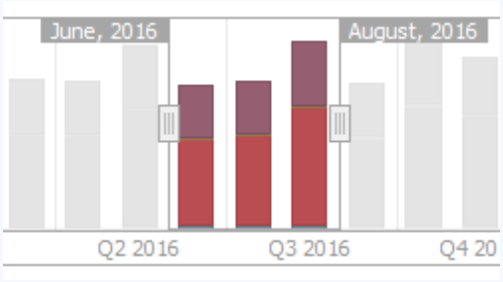
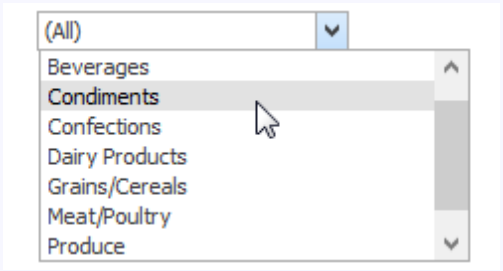
- Chart
- Scatter
- Chart Grid
- Pies
- Cards
- Gauges
- Pivot
- Choropleth
- Map Geo
- Point Maps
- Range Filter Image
- Text Box
- Treemap
- Filter Elements

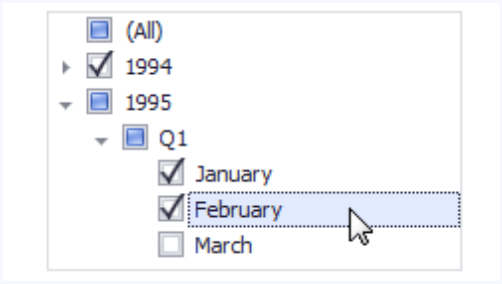
Data Presentation Basics

The Dashboard Viewer is used to present dashboards in Windows Forms applications. A wide range of dashboard items are used to display visual or textual information.

Dashboard Item	Image	Description
Chart		Displays data graphically using bars, lines, points, etc.
Scatter Chart		Visualizes relationships between numeric variables.
Grid		Presents data in tabular form.
Pies		Displays a series of pies or donuts that represent the contribution of each value to the total.

Cards		Displays a series of cards, each illustrating the difference between two values.
Gauges		Visualizes data within a series of gauges.
Pivot		Displays cross-tabular reports and allows you to analyze multi-dimensional data.
Choropleth Map		Colorizes areas in proportion to the provided values.
Geo Point Map		Displays callouts on the map using geographical coordinates.
Bubble Map		Displays bubbles on the map using geographical coordinates.

Pie Map		Places pies on the map using geographical coordinates.
Range Filter		Allows you to apply filtering by dragging selection thumbs along the argument axis.
Images		Displays images.
Text Box		Displays rich text within a dashboard.
Treemap		Visualizes data in nested rectangles.
Combo Box		Allows you to select a value(s) from the drop-down list.

List Box		Allows you to select a value(s) from the list.
Tree View		Displays values in a hierarchical way and allows you to filter other dashboard items by selecting parent/ child values.

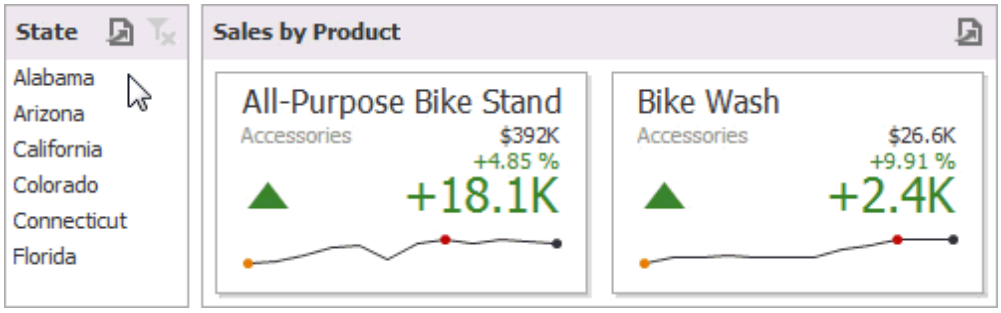
The Dashboard Viewer enables interaction between various dashboard items. These features include **Master Filtering** and **Drill-Down**.

- Master
- Filtering
- Drill-Down

To learn more about the dashboard layout, see the Dashboard Layout topic.

Master Filtering

The Dashboard allows you to use any data-aware dashboard item as a filter for the entire dashboard (Master Filter). You can select elements in a Master Filter item (chart bars, pie segments, grid records, etc.) to filter data in the rest of the dashboard by the selected values.



Master Filtering Modes

The Master Filter item supports two selection modes.

Multiple

Allows you to select multiple elements in the Master Filter item.

To clear the selection in the Master Filter item, use the **Clear Master Filter** button in the dashboard item's caption.

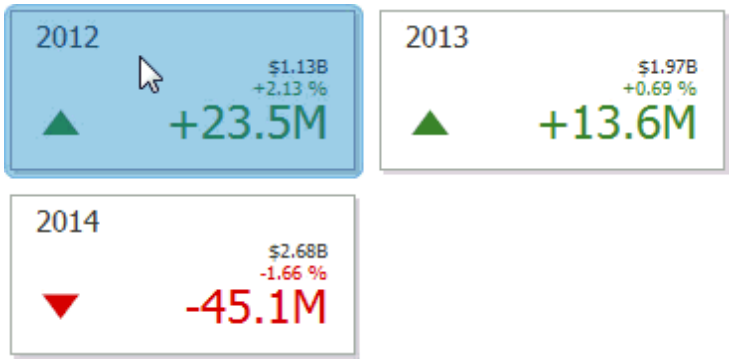
Single

Allows you to select only one element in the Master Filter item. When this mode is enabled, the default selection will be set to a Master Filter element. You can change this selection, but cannot clear it.

To learn how to filter dashboard data via a specific dashboard item, refer to the documentation for this item in the Dashboard Items section.

Drill-Down

Dashboard provides the drill-down feature, which allows you to change the detail level of data displayed in a dashboard item. This feature allows you to drill down to display the details, or drill up to view more general information.



To learn how to drill down using a particular dashboard item, refer to the documentation for this item in the Dashboard Items topic.

To return to the previous detail level (drill up), use the Drill Up button (the icon) in the dashboard item's caption, or the corresponding command in the context menu.

Dashboard Layout

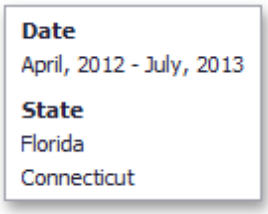
This topic describes the features related to the dashboard layout.

- Dashboard Title
- Dashboard Item
- Caption Resizing
  Dashboard Items

Dashboard Title

The **Dashboard Title** is located at the top of the **Dashboard**. The dashboard title can contain text or image content, elements selected in the master filter item and command buttons.

When you hover over the filter icon ( ), all master filters applied to the dashboard are displayed in the invoked popup.



The dashboard title can contain the following command buttons.

- **Export To** button (the icon) - allows you to print/export the dashboard. To learn more about printing and exporting, see the Printing and Exporting topic.
- **Parameters** button (the icon) - allows you to modify dashboard parameter values. To learn how to modify dashboard parameter values, see the Requesting Parameter Values topic.

Dashboard Item Caption

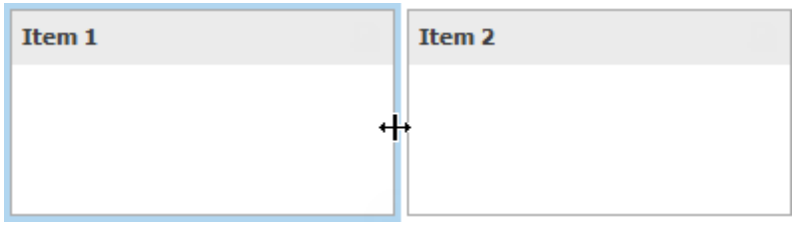
Each dashboard item has a caption that is displayed at the top of this item. The caption contains static text along with other information, as well as command buttons.

The caption of the Dashboard item contains the following information and buttons, depending on the dashboard item type:

- **Dashboard Item Name** - represents the static text within a dashboard item's caption.
- **Data Item Container Name** - represents the name of the data item container.
- **Drill-Down** value - shows value(s) from the current drill-down hierarchy. To learn more, see the Drill- Down topic.
- **Export to** button - allows you to print or export a dashboard item. To learn how to print individual dashboard items, see the Printing and Exporting topic.
- **Values** button - invokes a drop-down menu that allows you to switch between provided values (in the pie, card, gauge and map dashboard items). To learn more, see the **Data Presentation Basics** topic for the corresponding dashboard item.
- **Clear Master Filter** button - allows you to reset filtering when a dashboard item acts as the Master Filter. To learn more, see the **Interactivity** topic for the corresponding dashboard item.
- **Drill Up** button - allows you to return to the previous detail level when the drill-down capability is enabled for this item. To learn more, see the **Interactivity** topic for the corresponding dashboard item.

Resizing Dashboard Items

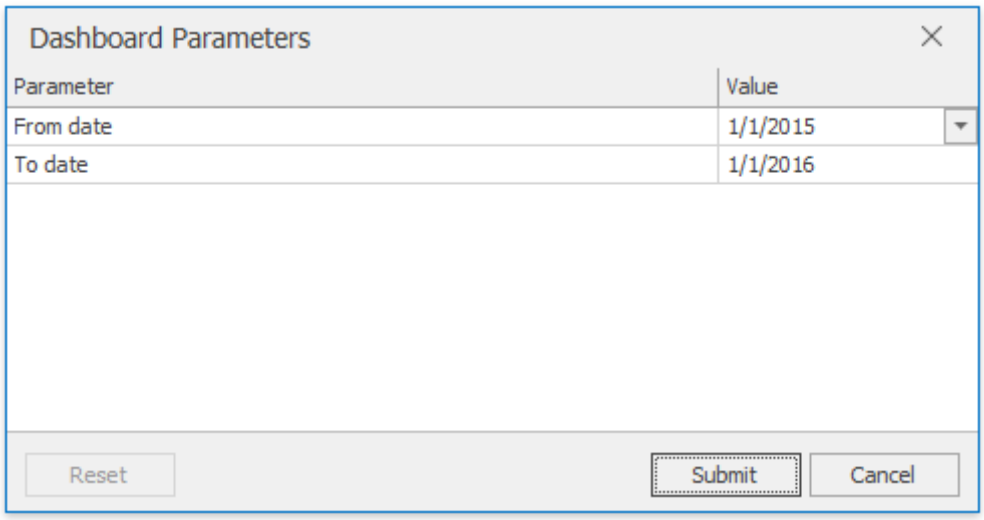
The Dashboard Viewer provides the capability to resize dashboard items.



You can resize individual items (or a group of items) by dragging their edges.

Dashboard Parameters Requesting Parameter Values

The Dashboard Viewer provides a built-in Dashboard Parameters dialog, which allows you to change dashboard parameter values. This dialog can be used to apply filtering to dashboard data.



To invoke the Dashboard Parameters dialog in the Dashboard Viewer, click the Parameters button (the icon) in the dashboard title.

Select the required parameter values in the Dashboard Parameters dialog and click the Submit button to apply the changes.

To reset changes to the default values, click the Reset button.

Printing and Exporting

The Dashboard Viewer provides the capability to print or export an entire dashboard and individual items.

- Printing and Exporting Dashboards
- Printing and Exporting Dashboard Items

Printing and Exporting Dashboards

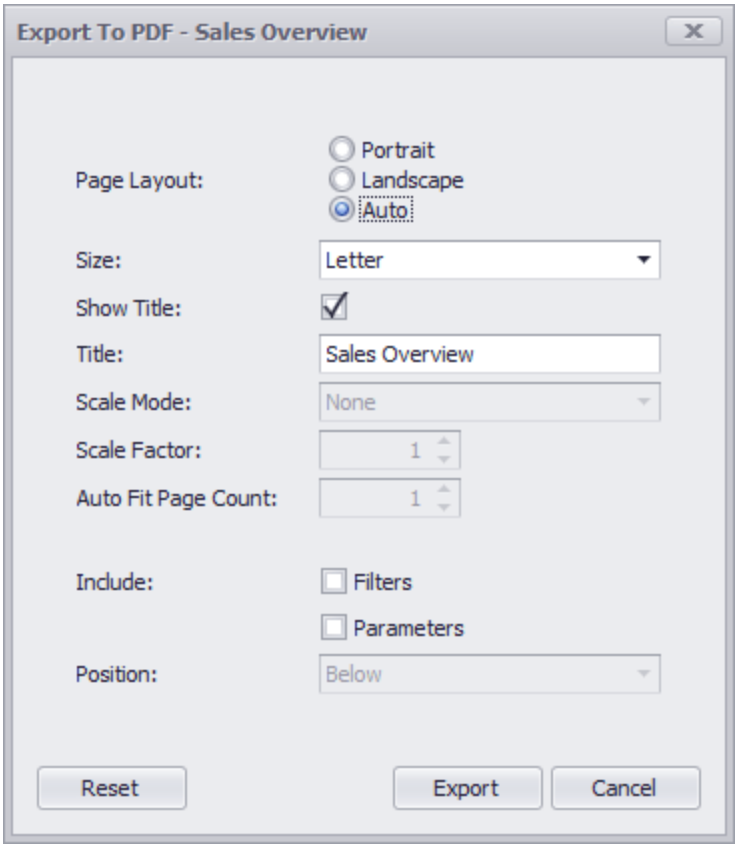
To print or export the entire dashboard, click the button in the dashboard title area and choose the required action.

Print Preview...

Allows you to customize the document before printing/exporting. For instance, the following settings can be changed: the orientation and size of the printed page, page margins, etc.

Export to PDF

Invokes a corresponding dialog that allows you to export a dashboard to a PDF file with specific options. The following options are available:



- **Page Layout** - Specifies the page orientation used to export a dashboard. You can select between Portrait, Landscape, and Auto. Note that in the Auto mode, page orientation is selected automatically depending on the horizontal and vertical sizes of a dashboard.
- **Size** - Specifies the standard paper size (for instance, Letter or A4).
- **Show Title** - Specifies whether or not to apply the dashboard title to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Scale Mode** - Specifies the mode for scaling when exporting a dashboard.

Note that this option is in effect when **Page Layout** is set to a value different from Auto.

- **Scale Factor** - Specifies the scale factor (in fractions of 1) by which a dashboard is scaled.

This option is in effect if **Scale Mode** is set to Use Scale Factor.

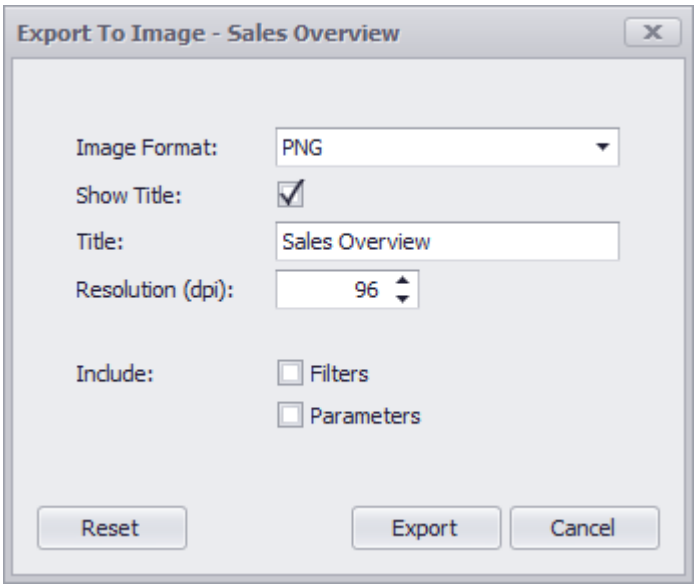
- **Auto Fit Page Count** - Specifies the number of horizontal/vertical pages spanning the total width/height of a dashboard.

This option is in effect if **Scale Mode** is set to Auto Fit to Page Width.

- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Export to Image

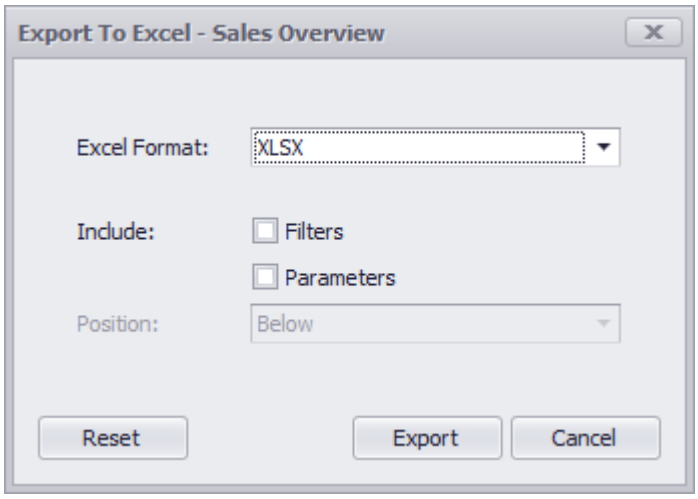
Invokes a corresponding dialog that allows you to export a dashboard to an image in the specified format. The following options are available:



- **Image Format** - Specifies the image format in which the dashboard is exported. The following formats are available: PN G, JPE G, and G IF.
- **Show Title** - Specifies whether or not to apply the dashboard title to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export a dashboard.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.

Export to Excel

Invokes a corresponding dialog that allows you to export dashboard's data to the Excel file. The following options are available:



Excel Format - Specifies the Excel workbook format in which the dashboard's data is exported. You

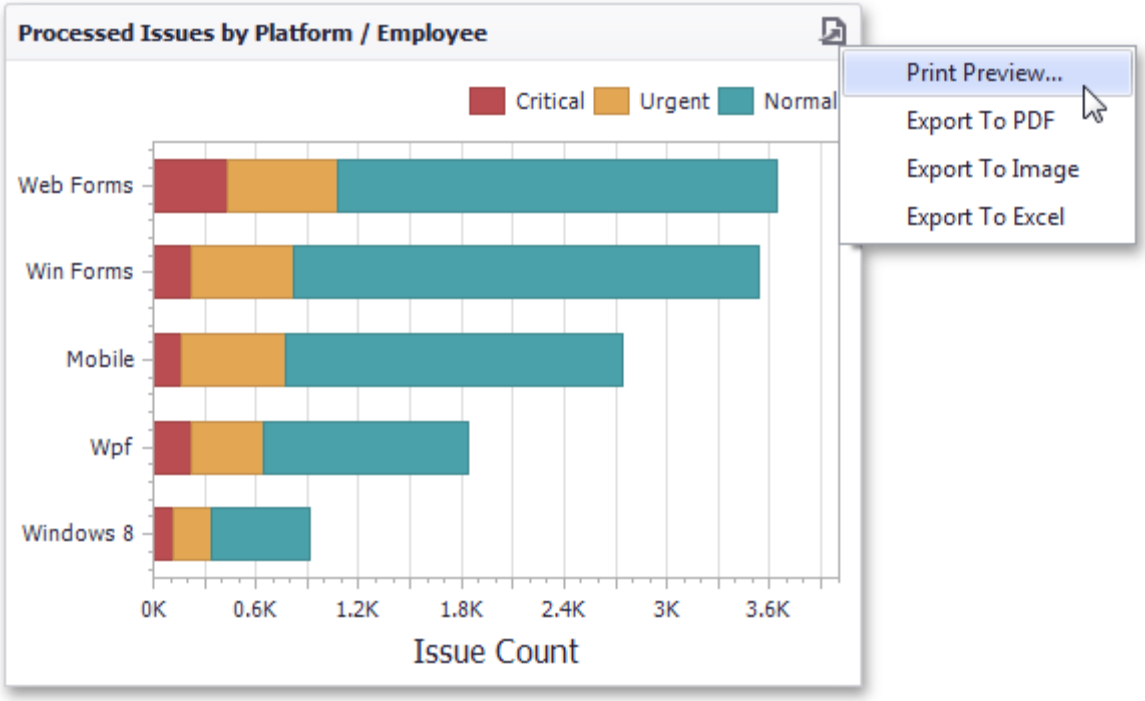
can select between XLSX and XLS.

- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Sheet.

Specify the required options in the invoked dialog and click the Export button to export the dashboard. To reset changes to the default values, click the Reset button.

Printing and Exporting Dashboard Items

To print or export a dashboard item, click the button in its caption and choose the required action.



- **Print Preview...** - Allows you to customize the document before printing/exporting.
- **Export to PDF** - Invokes a corresponding dialog that allows you to export a dashboard to a PDF file with specific options.
- **Export to Image** - Invokes a corresponding dialog that allows you to export a dashboard to image in the specified format.
- **Export to Excel** - Invokes a corresponding dialog that allows you to export a dashboard item's data to the Excel workbook or CSV file.

To learn more about printing/exporting specifics of different dashboard items, see the **Printing and Exporting**

topic for the required dashboard item.

Dashboard Items

The BI Dashboard provides several visualization elements (dashboard items) designed to effectively present visual or textual information in a dashboard.

This section describes the available dashboard items.

- Chart
- Scatter
- Chart
- Grid
- Pies
- Cards
- Gauges
- Pivot
- Choropleth
- Map Geo
- Point Maps
- Range
- Filter
- Image
- Text Box
- Treemap
- Filter
- Elements

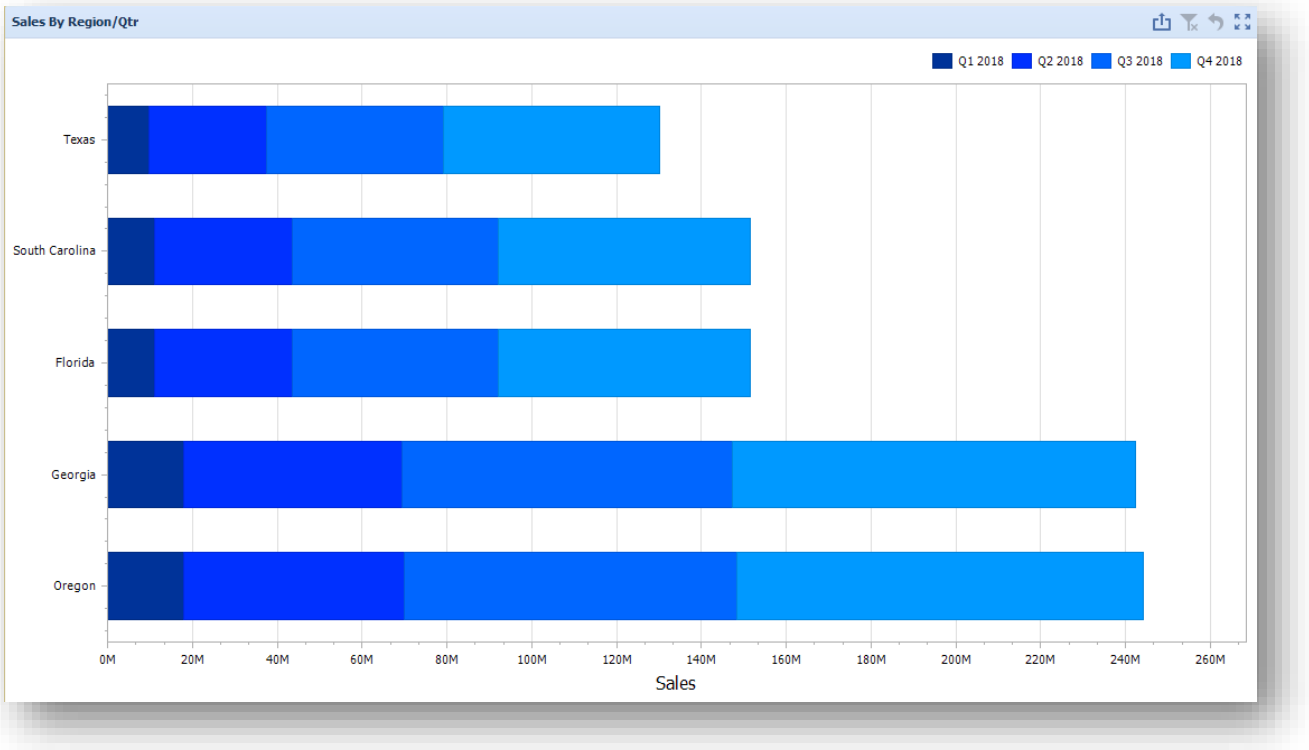
Chart

The topics in this section describe the Chart dashboard item, which visualizes data in XY-diagrams of different kinds - from line and bar charts to candle stick and bubble charts.

- Data Presentation
- Basics Interactivity
- Printing and Exporting

Data Presentation Basics

The Chart dashboard item presents data visually using different types of series.



A series represents a grouping of related data points. The most important characteristic of a series is its type, which determines a particular visual representation of data.

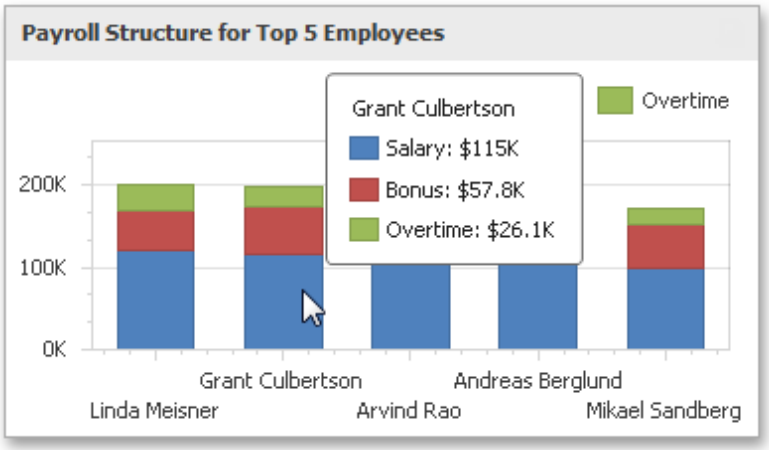
The Chart dashboard item includes the following series types.

- A **Bar** series displays data as sets of rectangular bars with lengths proportional to the values that they represent.
- **Point** and **Line** series display data as standalone points or points joined by a line.
- An **Area** series displays data by a line that joins points, and the shaded area between the line and the argument axis.
- A **Range** series is the area between two simple series displayed as a shaded area, or bars that stretch from a point in one series to the corresponding point in another series.

- A **Weighted** series displays data using a third dimension, expressed by a bubble's size.
- **Financial** series are useful in analyzing stock and bond prices, as well as the behavior of commodities.

Tooltip

The Chart dashboard item can display a tooltip that shows information on a hovered series point. r



Interactivity

This topic describes features that enable interaction between the Chart and other dashboard items. These features include Master Filtering and Drill-Down.

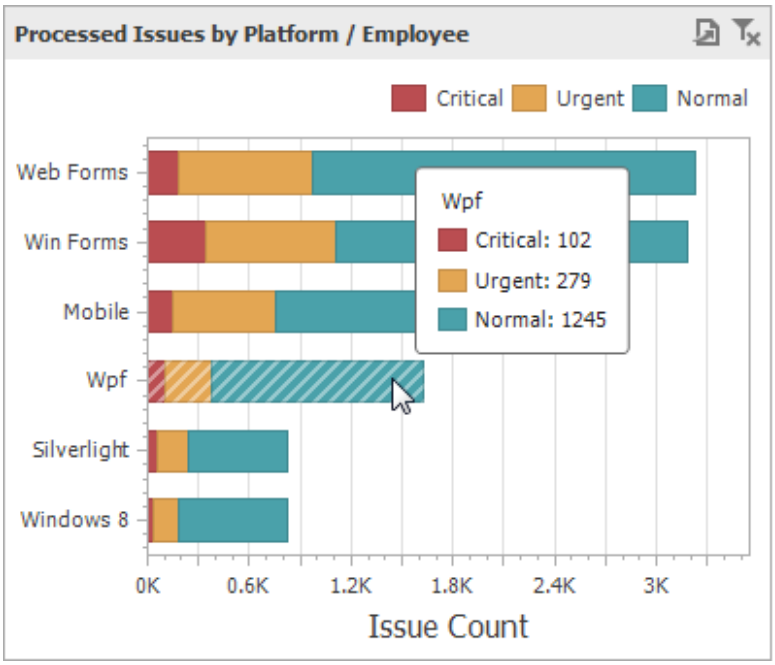
Master Filtering

The **Dashboard** allows you to use any data aware dashboard item as a filter for other dashboard items (**Master Filter**). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

The Chart dashboard item supports filtering by **argument** or **series** values.

Filtering by Arguments

When filtering by arguments is enabled, you can click series points to make other dashboard items display only data related to selected argument values.

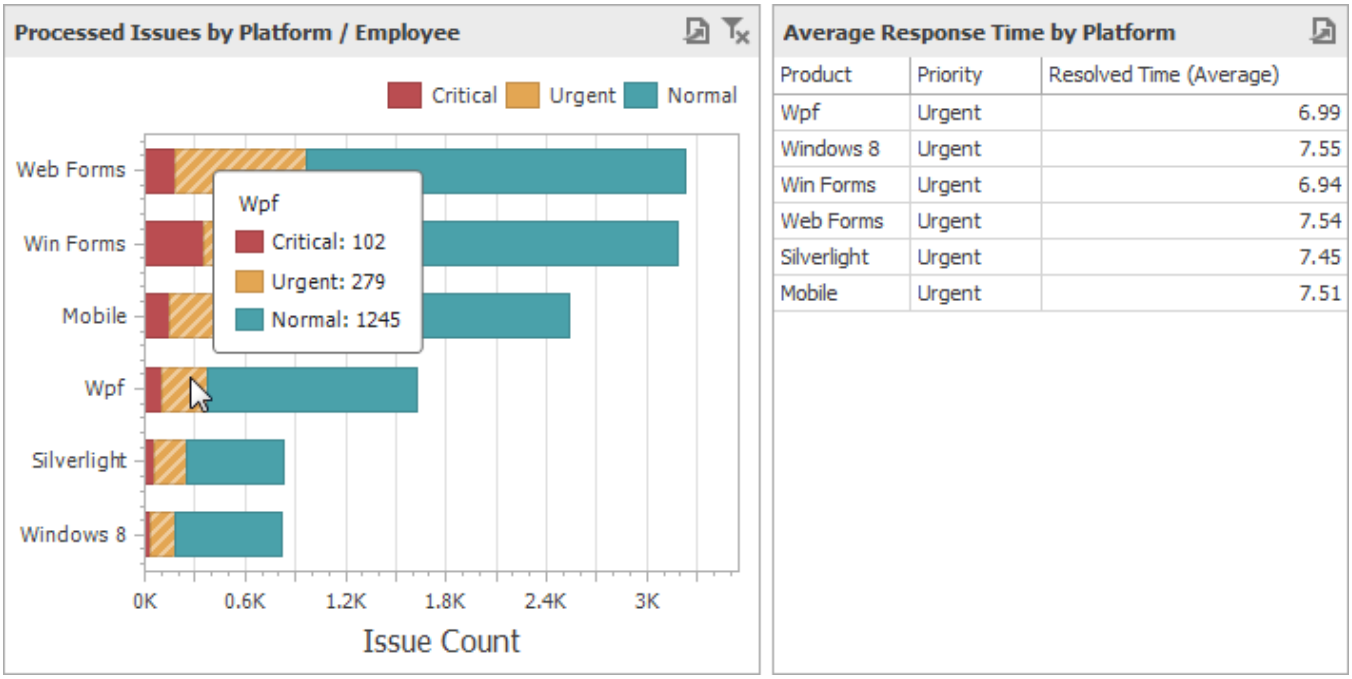


Average Response Time by Platform

Product	Priority	Resolved Time (Average)
Wpf	Critical	4.69
Wpf	Normal	13.8
Wpf	Urgent	6.99

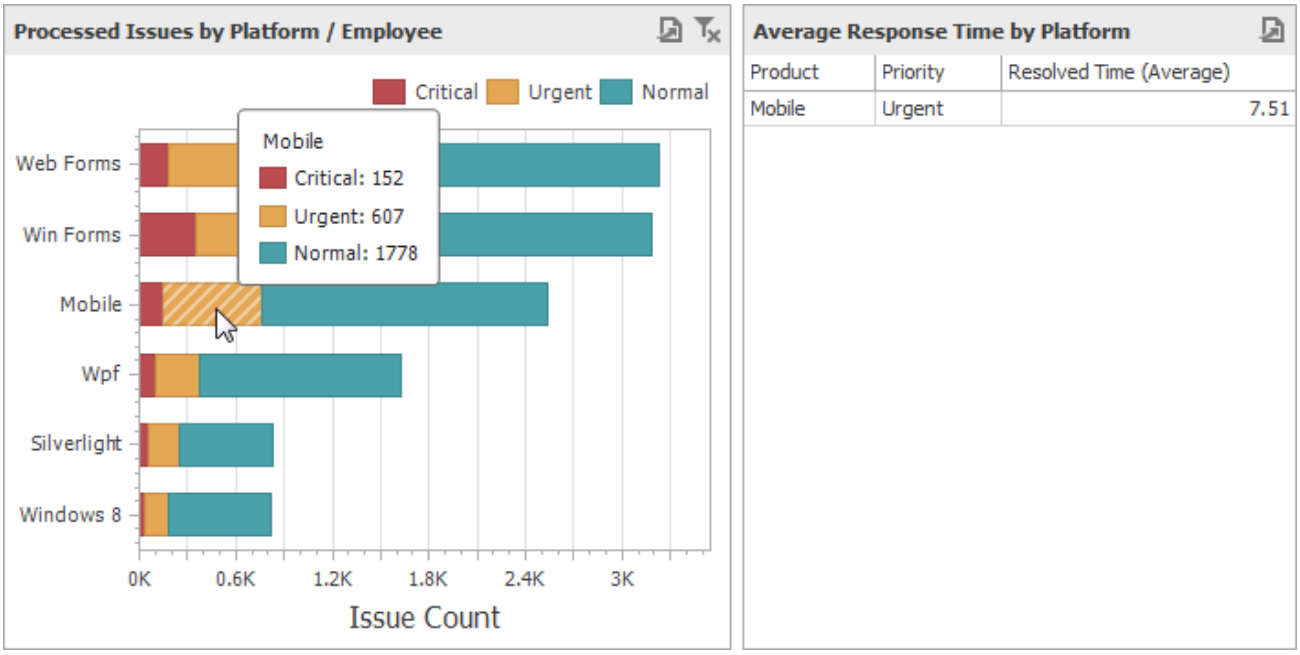
Filtering by Series

When filtering by series is enabled, you can click a series point to make other dashboard items display only data related to the selected series.



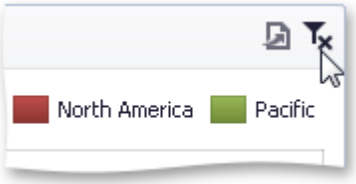
Filtering by Points

When filtering by points is enabled, you can click a individual point to make other dashboard items display only data



related to the selected point.

To reset filtering, use the Clear Master Filter button in the Chart's caption, or corresponding command in the Chart's context menu.



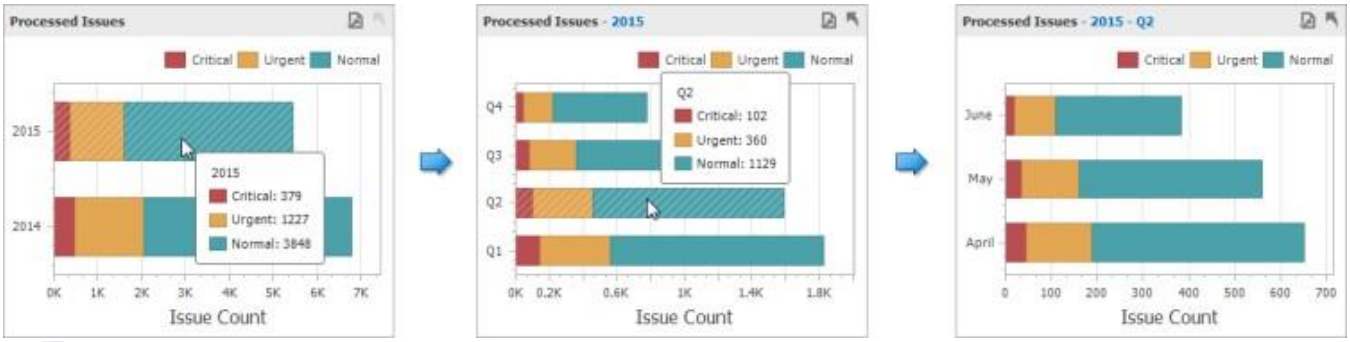
Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more, see Drill-Down.

The Chart dashboard item supports drill-down on argument or series values.

Drill Down on Arguments

When drill-down on arguments is enabled, you can click a series point to view a detail chart for the corresponding argument value.



Note

When **Filtering by Arguments** is enabled, you can view the details by double-clicking a series point.

Drill-Down on a Series

When drill-down on a series is enabled, you can click a series point (or corresponding legend item) to view a detail chart for the corresponding series.

Note

When **Filtering by Series** is enabled, you can view the details by double-clicking a series point.

To return to the previous detail level (drill up), use the Drill Up button within the Chart caption area, or the corresponding command in the Chart's context menu.

Printing and Exporting

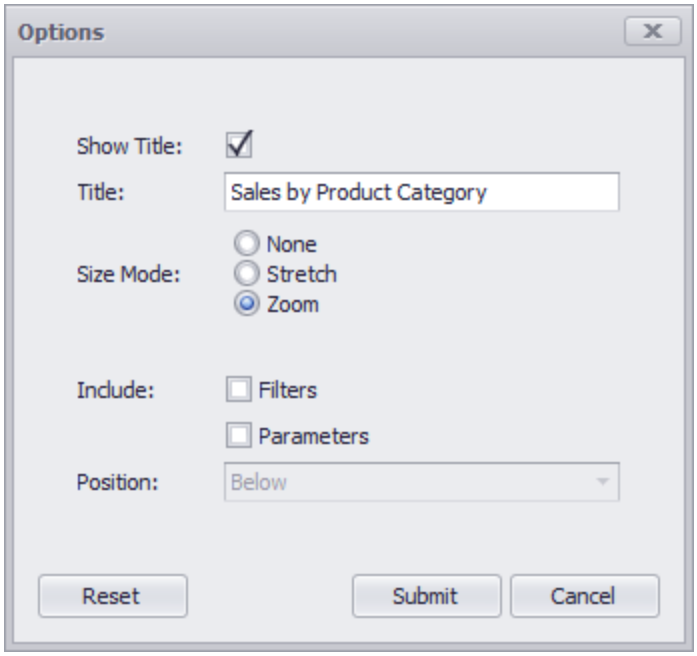
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes printing/exporting specifics for the **Chart** dashboard item.

- Printing
- Export To PDF
- Export To Image
- Export To Excel

Printing

If you are printing the Chart dashboard item using the Print Preview, you can customize the following options (via the **Options** button) before printing.

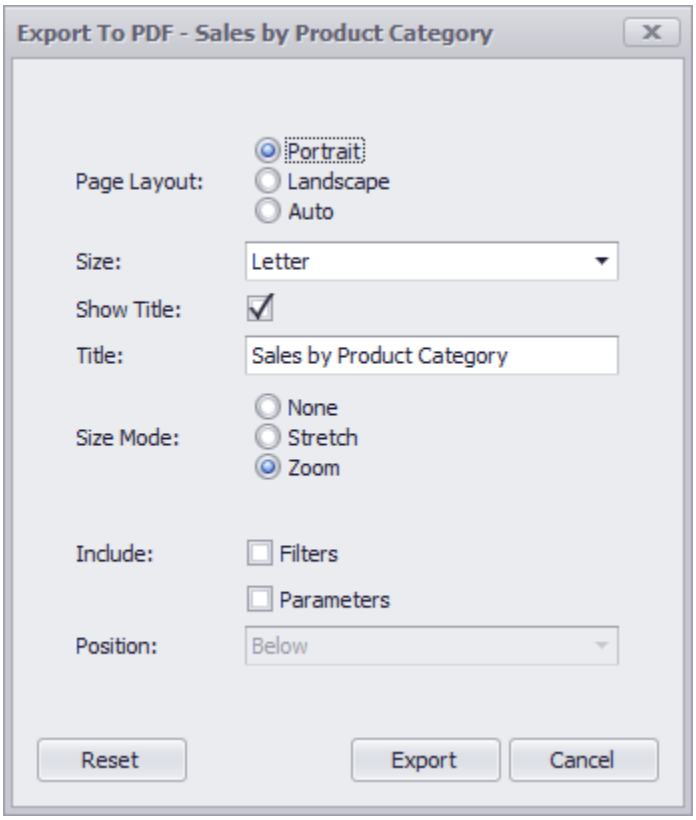


- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Size Mode** - Allows you to specify the print size mode for the Chart dashboard item.
- **Include | Filters** - Allows you to include master filter values to the printed
- document. **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

The following options are available when exporting the Chart dashboard item to a PDF.

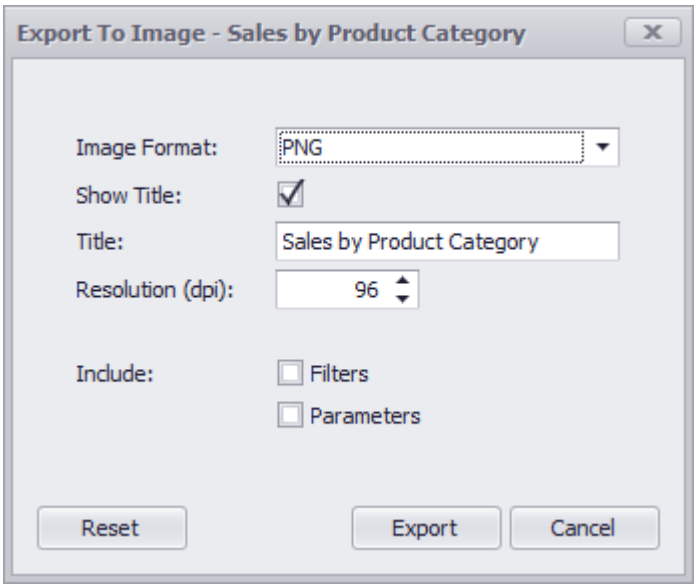


- **Page Layout** - Specifies the page orientation used to export a Chart dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the dashboard item caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Size Mode** - Specifies the export size mode for the Chart dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Chart dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:

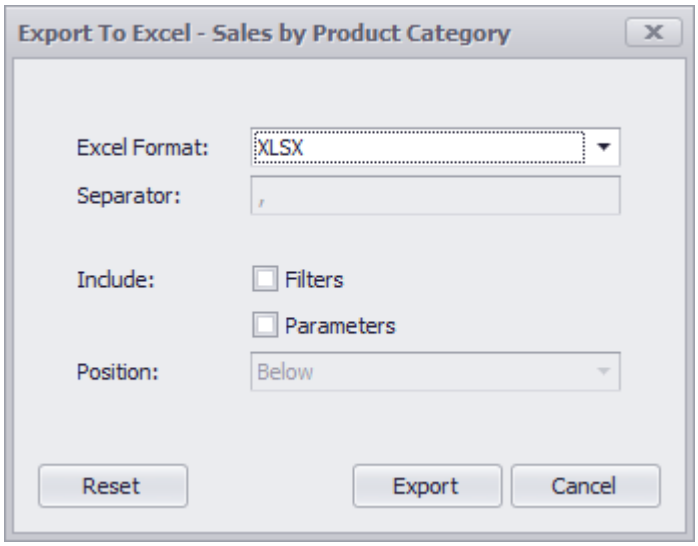


- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:



Excel Format - Specifies the Excel format in which the dashboard item is exported. You can use the

- XLSX, XLS or CSV formats.
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

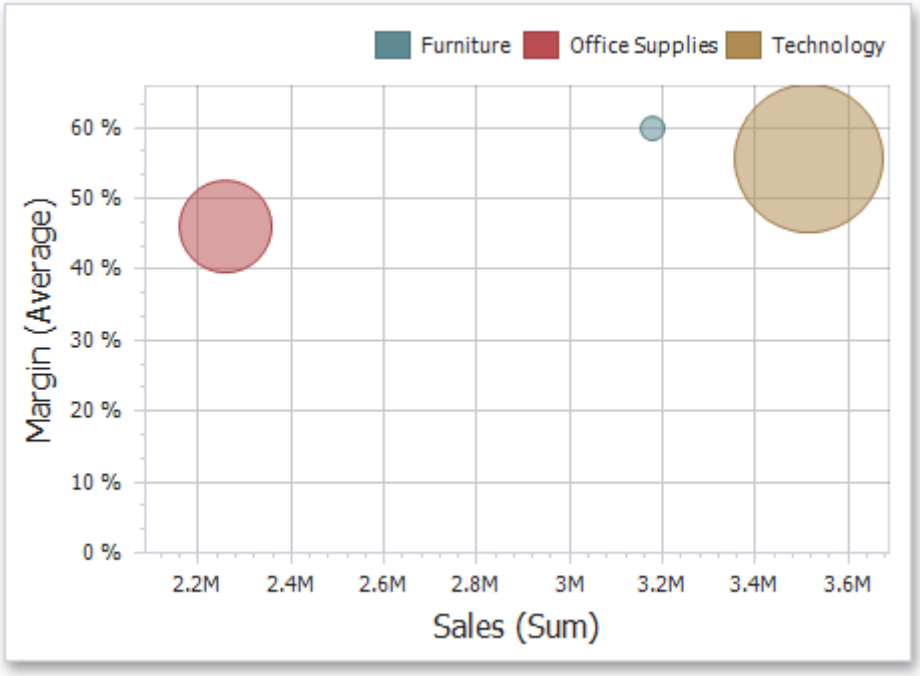
Scatter Chart

The topics in this section describe the **Scatter Chart** dashboard item, which visualizes summaries using numerical X/Y-axes and the size of data points.

- Data Presentation
- Basics Interactivity
- Printing and Exporting

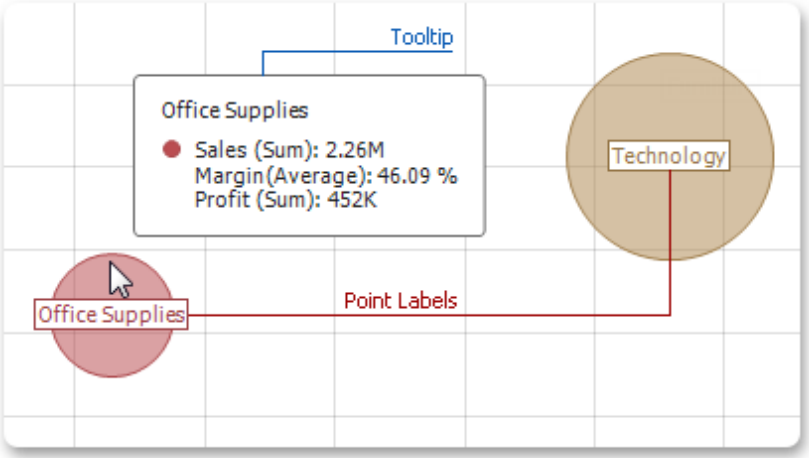
Data Presentation Basics

The Scatter Chart dashboard item visualizes summaries using three dimensions: the X-axis, the Y-axis and the size of data points.



Point Labels and Tooltips

The Scatter Chart dashboard item can display point labels and tooltips that show information on data points. To see a tooltip, hover over the required point.



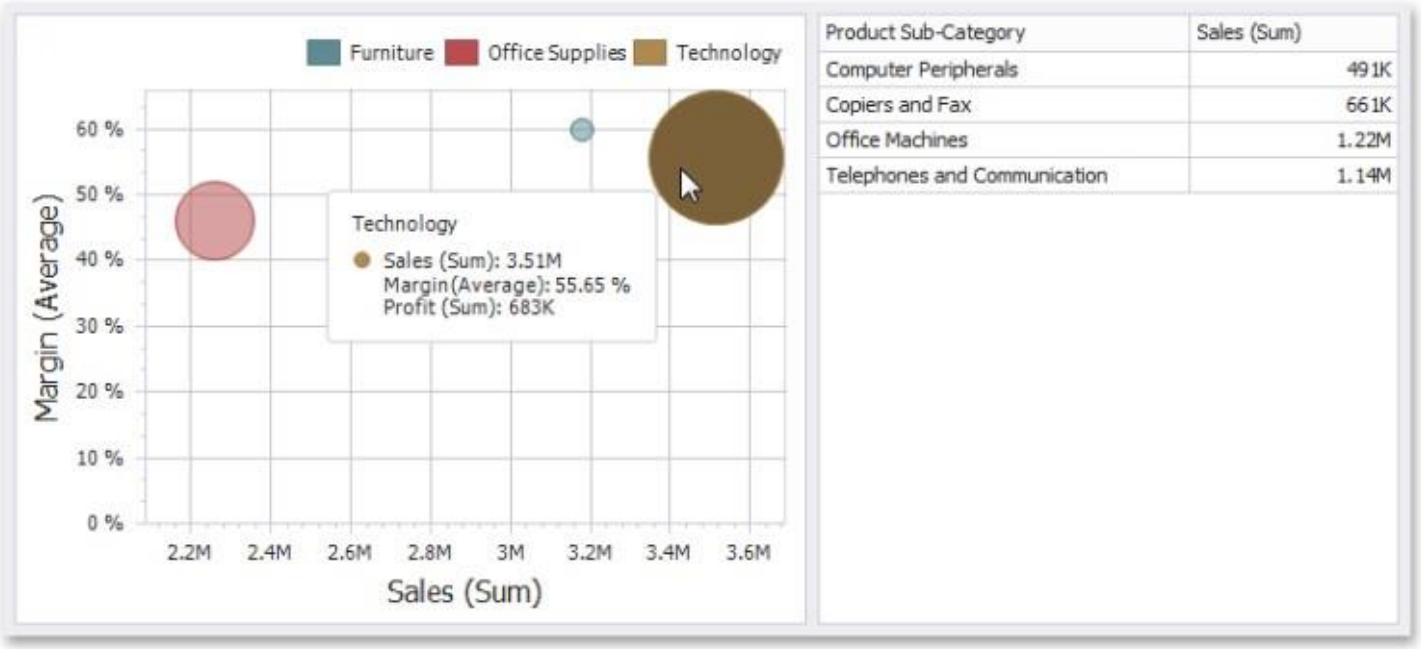
Interactivity

This topic describes features that enable interaction between the Scatter Chart and other dashboard items. These features include Master Filtering and Drill-Down.

Master Filtering

The **Dashboard** allows you to use any data aware dashboard item as a filter for other dashboard items (**Master Filter**). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

When Master Filtering is enabled, you can click a point (or multiple points by holding down the **CTRL** key) to make other dashboard items only display data related to the selected point(s).

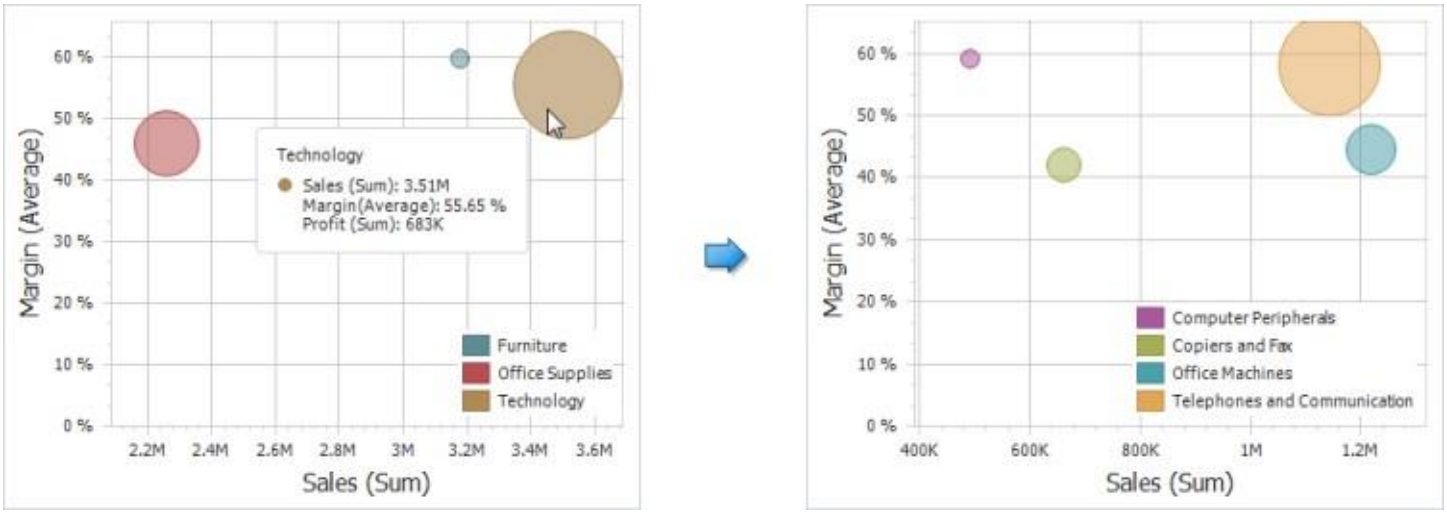


To reset filtering, use the **Clear Master Filter** button (the icon) in the Chart's caption area, or the **Clear Master Filter** command in the Chart's context menu.

Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more, see Drill-Down.

When drill-down is enabled, you can click a point to view the details.



Note

When **Master Filtering** is enabled, you can view the details by double-clicking a point.

To return to the previous detail level (drill up), use the **Drill Up** button (the icon) within the Chart's caption area or the **Drill Up** command in the Chart's context menu.

Printing and Exporting

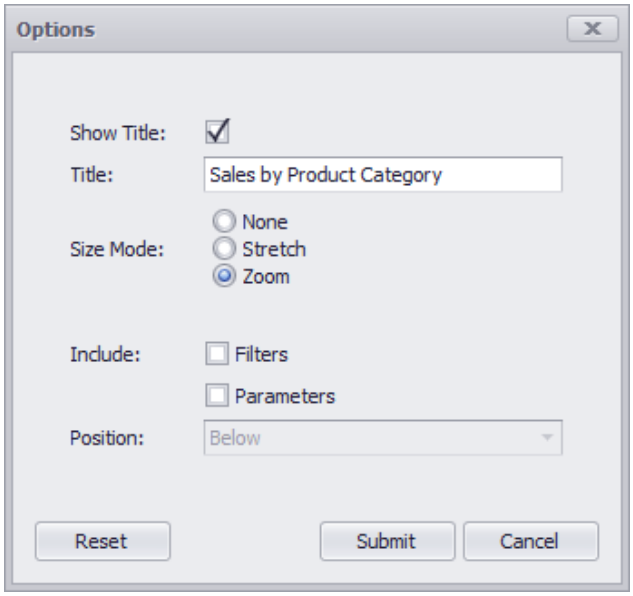
The Dashboard allows you to print/export individual dashboard items, or the entire dashboard. See the Printing and Exporting topic to learn more about printing concepts common to all dashboard items.

This topic describes printing/exporting specifics for the **Scatter Chart** dashboard item.

- Printing
- Export
  To PDF
- Export To Image
- Export To Excel

Printing

You can customize the following options (via the **Options** button) before printing the Scatter Chart dashboard item using the Print Preview:

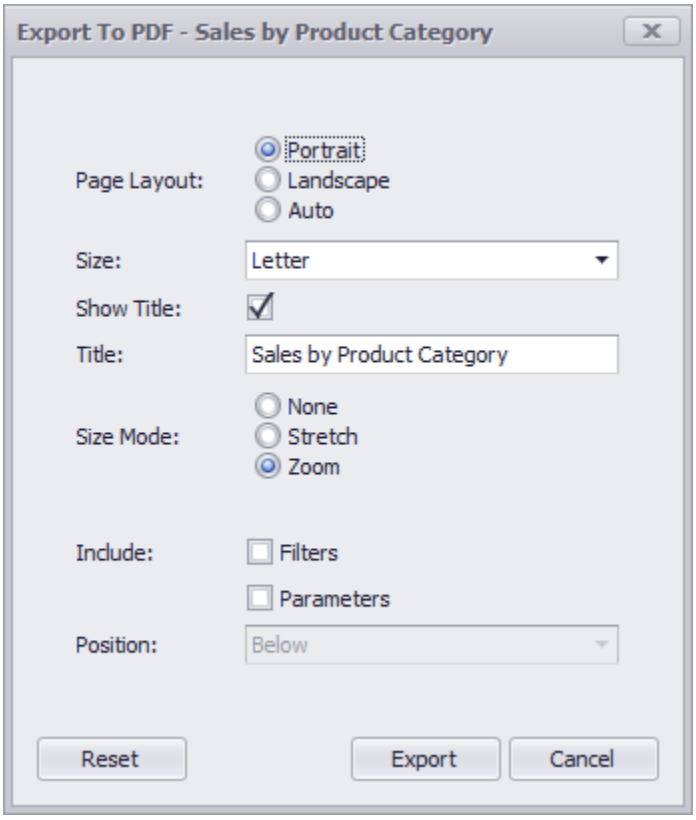


- **Show Title** - Specifies whether to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the printed document title.
- **Size Mode** - Allows you to specify the Scatter Chart dashboard item's print size
- mode. **Include | Filters** - Allows you to include master filter values to the printed
- document. **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the master filter and parameter values' position in the printed document. You can select from Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. Click the **Reset** button to reset changes to the default values.

Export To PDF

The following options are available when exporting the Chart dashboard item to a PDF:

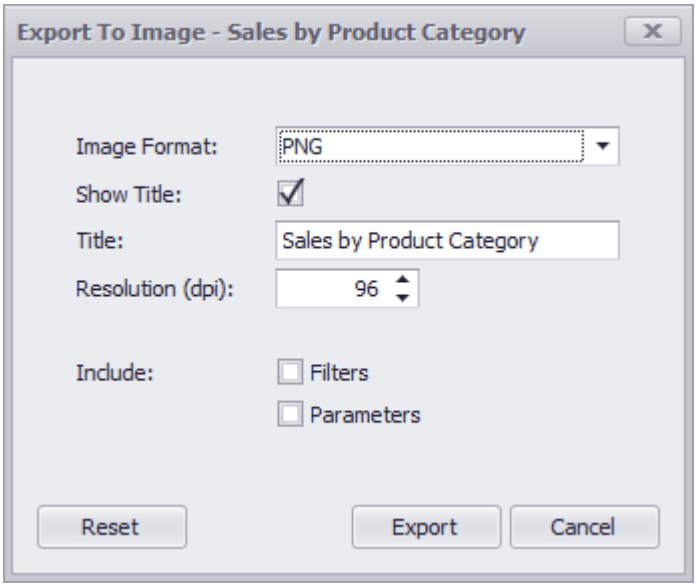


- **Page Layout** - Specifies the page orientation used when exporting a Scatter Chart dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies the exported document's title.
- **Size Mode** - Specifies the Scatter Chart dashboard item's export size mode.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Scatter Chart dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:

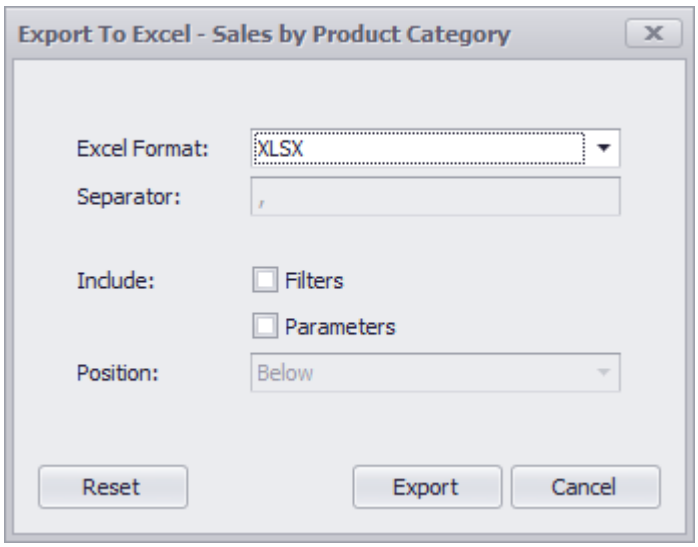


- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:



Excel Format - Specifies the Excel format in which the dashboard item is exported. You can use the

- XLSX, XLS or CSV formats.
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

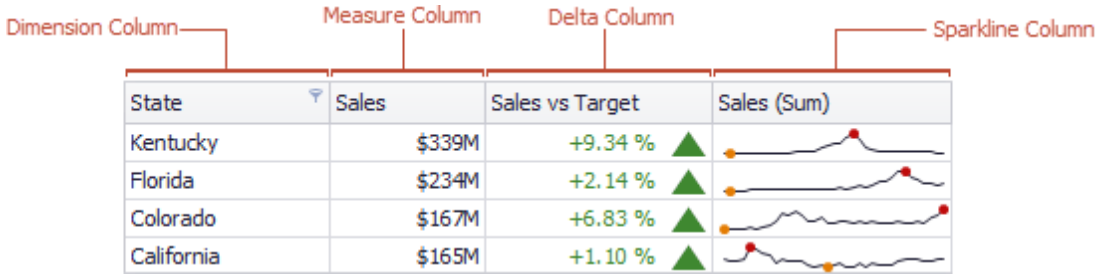
Grid

The topics in this section describe the **Grid** dashboard item, which displays data in a two-dimensional table.

- Data Presentation
- Basics Interactivity
- Printing and Exporting

Data Presentation Basics

The **Grid** displays data in a two-dimensional table that supports four types of columns.

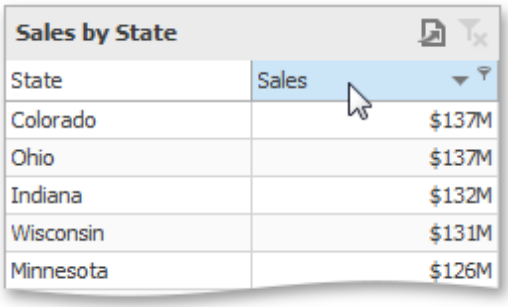


The **dimension column** displays values from the bound data item "as is".

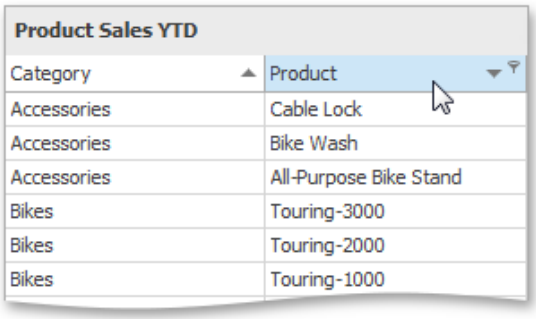
- The **measure column** displays summaries calculated from data in the bound data item.
- The **delta column**, bound to two measures, calculates summaries for both measures, and displays the difference between these summaries.
- The **sparkline column** visualizes the variation of summary values over time.

Sort Grid Rows

To sort records by a column's values and replace existing sort conditions that are applied to the current or other columns, click the target column's header until an Up or Down arrow icon is displayed within the header. The Up and Down arrows indicate ascending and descending sort orders, respectively.



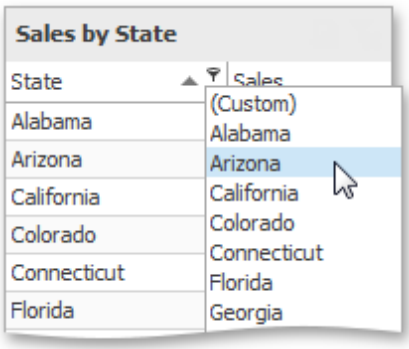
To sort records by a column's values while preserving existing sort conditions, click a column header while holding the **SHIFT** key until an Up or Down arrow icon is displayed within the header.



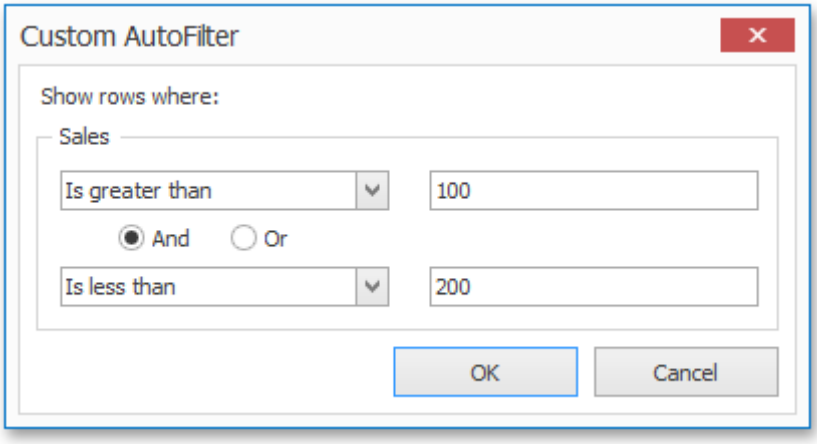
To remove sorting by a column, click a column header while holding down the **CTRL** key.

Filter Grid Data

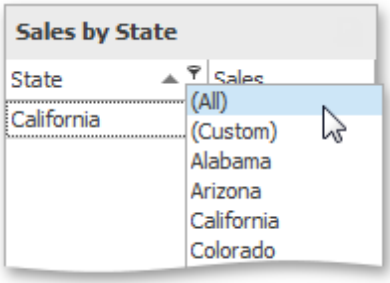
To filter grid data, click the filter button (the icon) and select the required filter value in the invoked filter dropdown list.



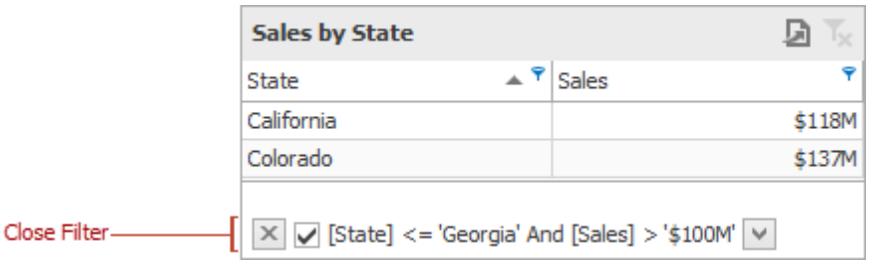
Click **Custom** to construct filter criteria involving up to two conditions. This will invoke the **Custom AutoFilter** dialog, allowing you to compare a column with one or two values.



To clear the filter applied to a specific column, invoke the filter dropdown list and click **All**.

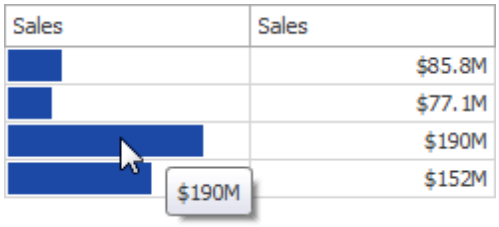


To clear all filter criteria, click the **Close Filter** button within the Filter Panel.



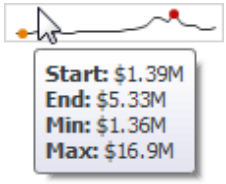
Tooltips

A Grid dashboard item can display a tooltip when the mouse pointer is hovered over the bar in the measure column.



The tooltip shows the value in the measure column as text.

When the mouse pointer is hovered over the cell in the sparkline column, the tooltip can display start/end values and minimum/maximum values.



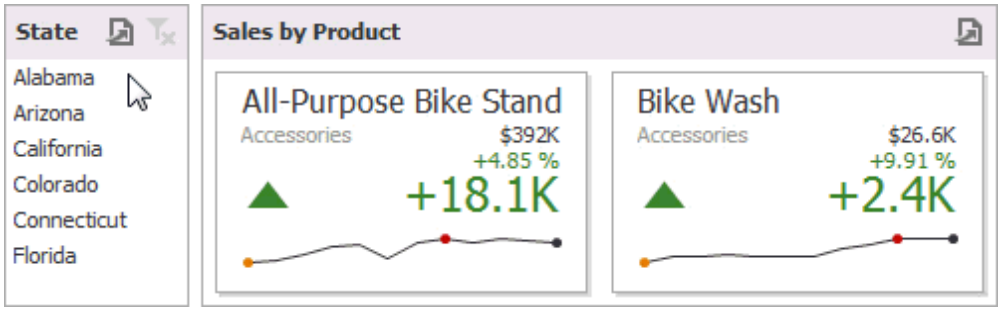
Interactivity

This topic describes features that enable interaction between the Grid and other dashboard items. These features include Master Filtering and Drill-Down.

Master Filtering

The **Dashboard** allows you to use any data aware dashboard item as a filter for other dashboard items (**Master Filter**). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

When Master Filtering is enabled, you can click a grid row (or multiple rows by holding down the **CTRL** key) to make other dashboard items only display data related to the selected record(s).



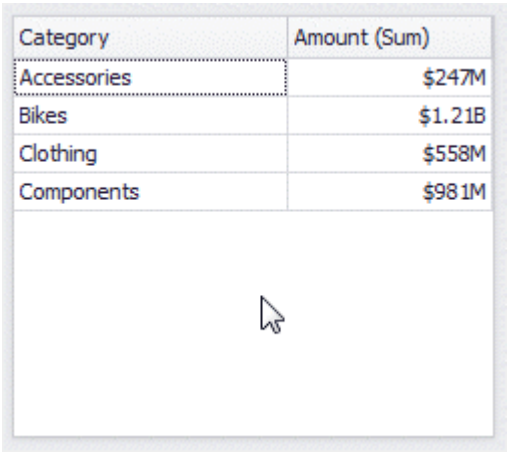
To reset filtering, use the **Clear Master Filter** button (the icon) in the Grid's caption area, or the **Clear Master Filter** command in the Grid's context menu.

Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more, see Drill-Down.

The Grid dashboard item supports drill-down for rows.

When drill-down is enabled, you can click a grid row to view the details.



Note

When **Master Filtering** is enabled, you can view the details by double-clicking a grid row.

To return to the previous detail level (drill up), use the **Drill Up** button (the icon) within the Grid's caption area, or the **Drill Up** command in the Grid's context menu.

Printing and Exporting

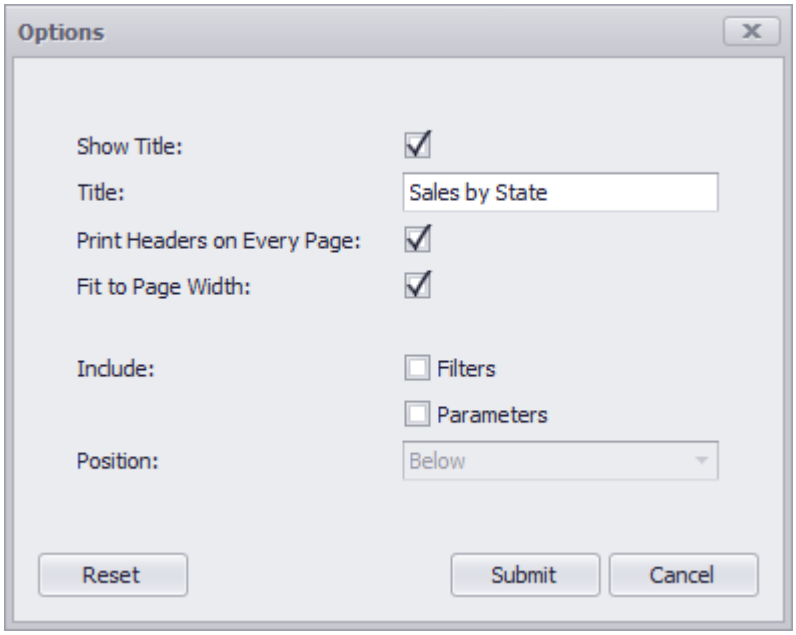
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a Grid dashboard item.

- Printing
- Export To PDF
- Export To Image
- Export To Excel

Printing

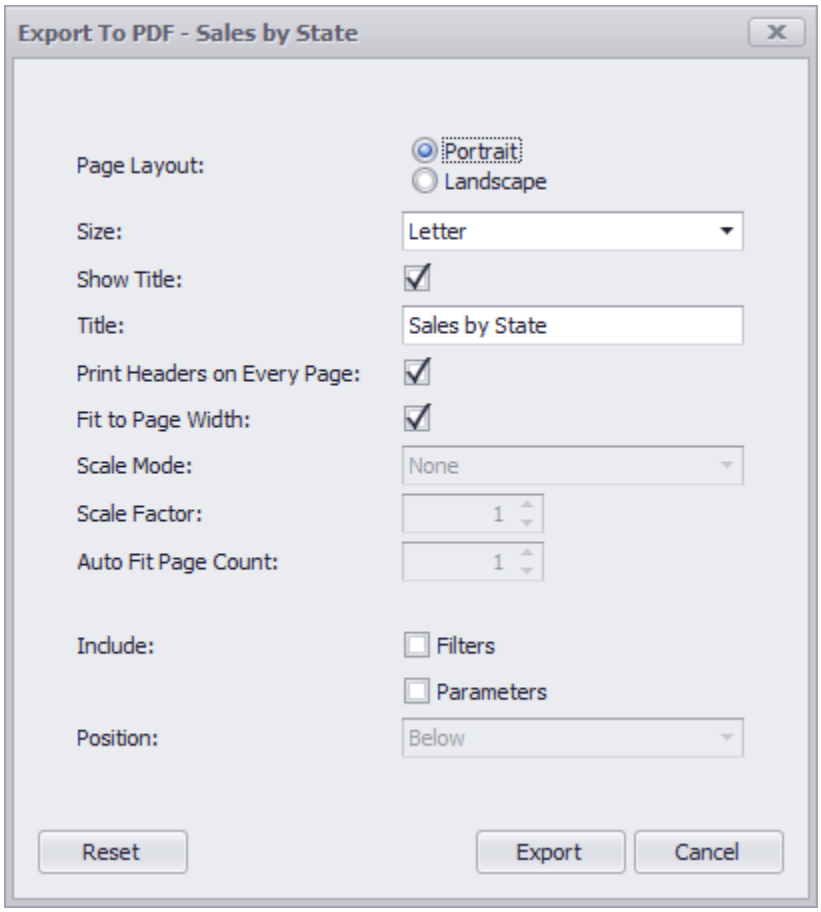
If you are printing the Grid dashboard item using the Print Preview, you can customize the following options (via the Options button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Print Headers on Every Page** - Specifies whether to print column headers of the Grid dashboard item on every page.
- **Fit to Page Width** - Specifies whether the size of the grid dashboard item is changed according to the width of the exported page.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

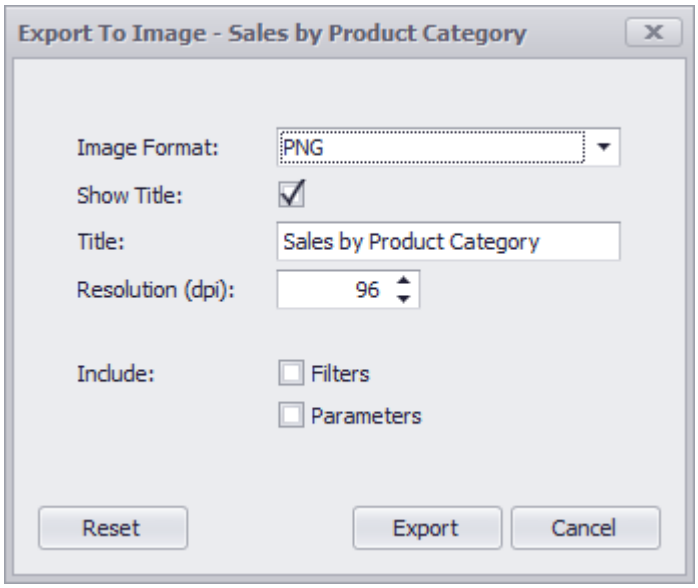


- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the dashboard item caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Print Headers on Every Page** - Specifies whether to print column headers of the Grid dashboard item on every page.
- **Fit to Page Width** - Specifies whether the size of the grid is changed according to the width of the exported page.
- **Scale Mode** - Specifies the mode for scaling when exporting a dashboard item.
- **Scale Factor** - Specifies the scale factor (in fractions of 1) by which a dashboard item is scaled.
- **Auto Fit Page Count** - Specifies the number of horizontal/vertical pages spanning the total width/height of a dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Grid dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:

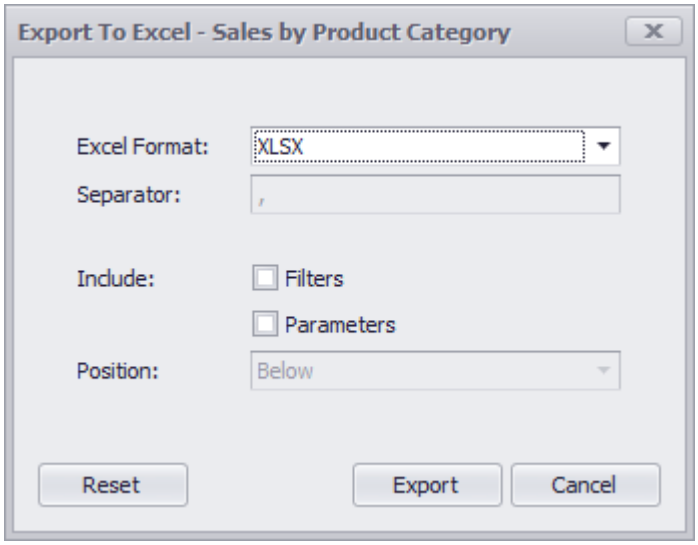


- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:



Excel Format - Specifies the Excel format in which the dashboard item is exported. You can use the

- XLSX, XLS or CSV formats.
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the Export button to export the dashboard item. Click the

Reset button to reset changes to the default values.

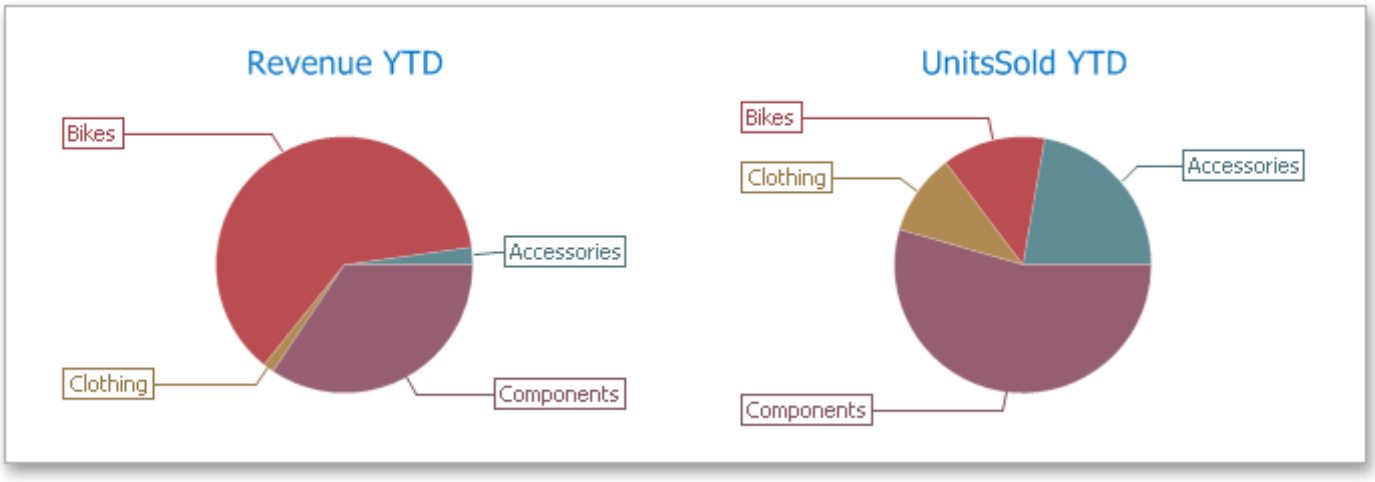
Pies

The topics in this section describe the **Pie** dashboard item, which displays a series of pies or donuts that represent the contribution of each value to a total.

- Data Presentation
- Basics Interactivity
- Printing and Exporting

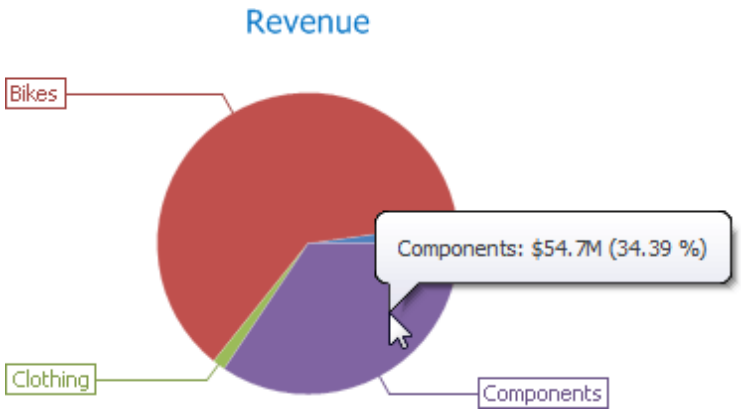
Data Presentation Basics

The Pie dashboard item displays a series of pies or donuts that represent the contribution of each value to a total.



Tooltip

A Pie dashboard item can display a tooltip that shows information about the hovered pie segment.



Interactivity

This topic describes features that enable interaction between the Pie and other dashboard items. These features include Master Filtering and Drill-Down.

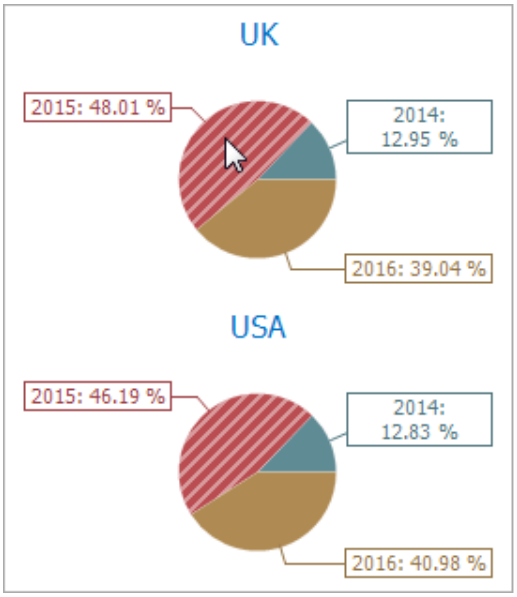
Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

The Pie dashboard item supports filtering by argument or series values.

Filtering by Arguments

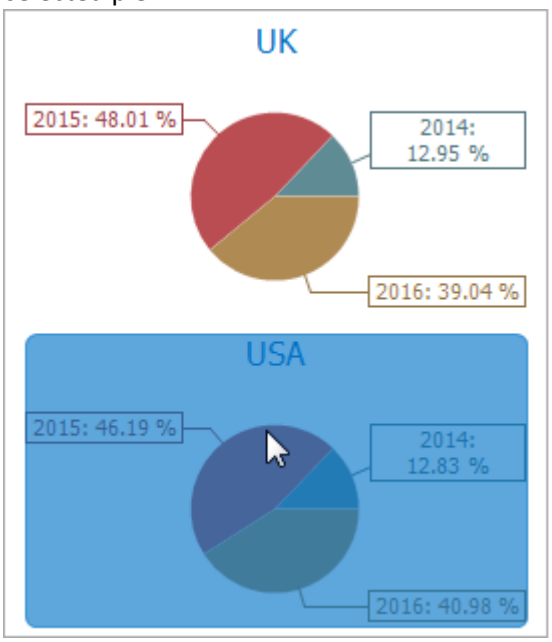
When filtering by arguments is enabled, you can click a pie segment to make other dashboard items only display data related to the selected argument value.



Year	Quarter	Country	Extended Price
2015	Q1	UK	$34.3K
		USA	$111K
	Q2	UK	$35.1K
		USA	$110K
	Q3	UK	$40.7K
		USA	$93.9K
	Q4	UK	$55.3K
		USA	$111K

Filtering by a Series

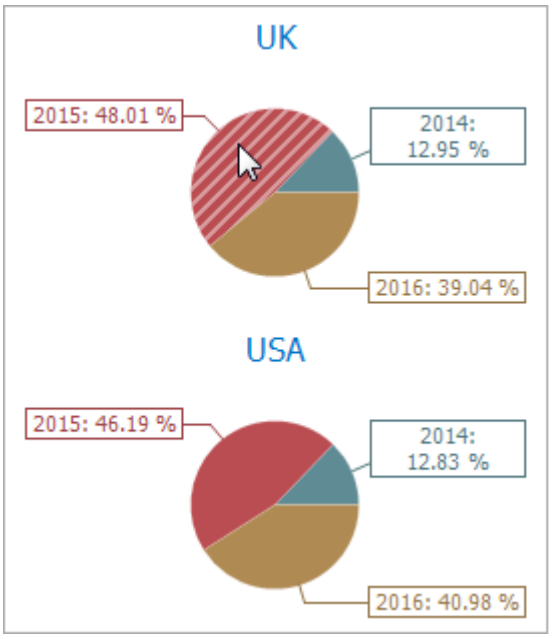
When filtering by a series is enabled, you can click a pie to make other dashboard items display only data related to the selected pie.



Year	Quarter	Country	Extended Price
2014	Q3	USA	$41.8K
	Q4		$76.5K
2015	Q1		$111K
	Q2		$110K
	Q3		$93.9K
	Q4		$111K
2016	Q1		$196K
	Q2		$182K

Filtering by a Points

When filtering by points is enabled, an you can click a single pie segment to make other dashboard items display only



Year	Quarter	Country	Extended Price
2015	Q1	UK	$34.3K
	Q2		$35.1K
	Q3		$40.7K
	Q4		$55.3K

data related to the selected segment.

To reset filtering, use the **Clear Master Filter** button (the icon) in the caption area of the Pie dashboard item, or the **Clear Master Filter** command in the context menu.

Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more, see Drill-Down.

The Pie dashboard item supports drill-down on argument or series values.

Drill Down on Arguments

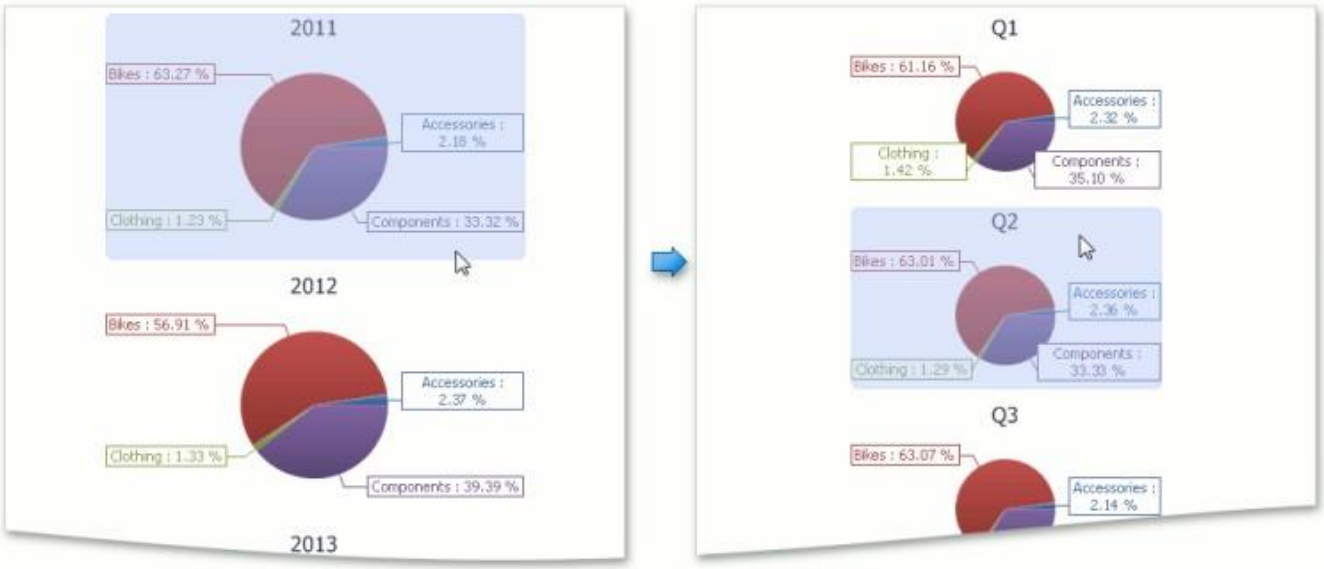
When drill-down on arguments is enabled, you can click a pie segment to view a detail diagram for the corresponding argument value.

Note

When **Filtering by Arguments** is enabled, you can view the details by double-clicking a pie segment.

Drill-Down on a Series

When drill-down on a series is enabled, you can click a pie chart to view a detail diagram for the corresponding series value.



Note

When **Filtering by Series** is enabled, you can view the details by double-clicking a pie chart.

To return to the previous detail level (drill-up), use the Drill Up button (the icon) in the caption area of the Pie dashboard item, or the Drill Up command in the context menu.

Printing and Exporting

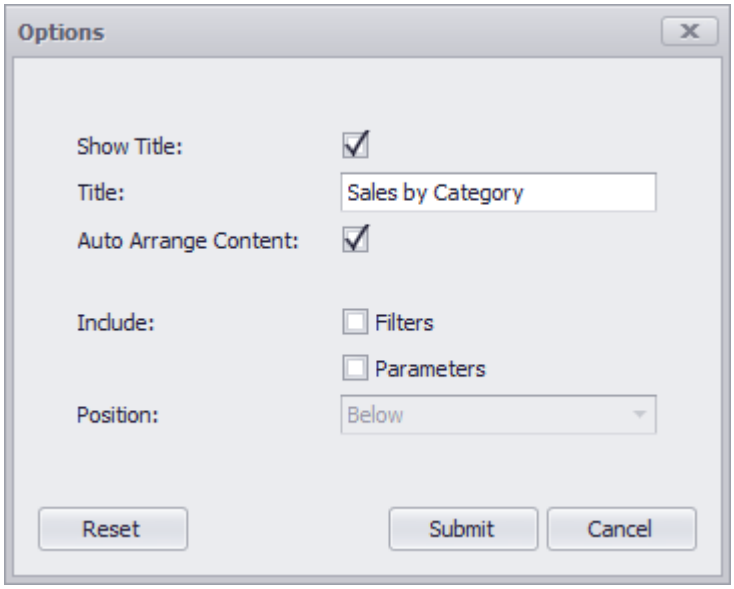
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a Pie dashboard item.

- Printing
- Export
  To PDF
- Export To Image
- Export To Excel

Printing

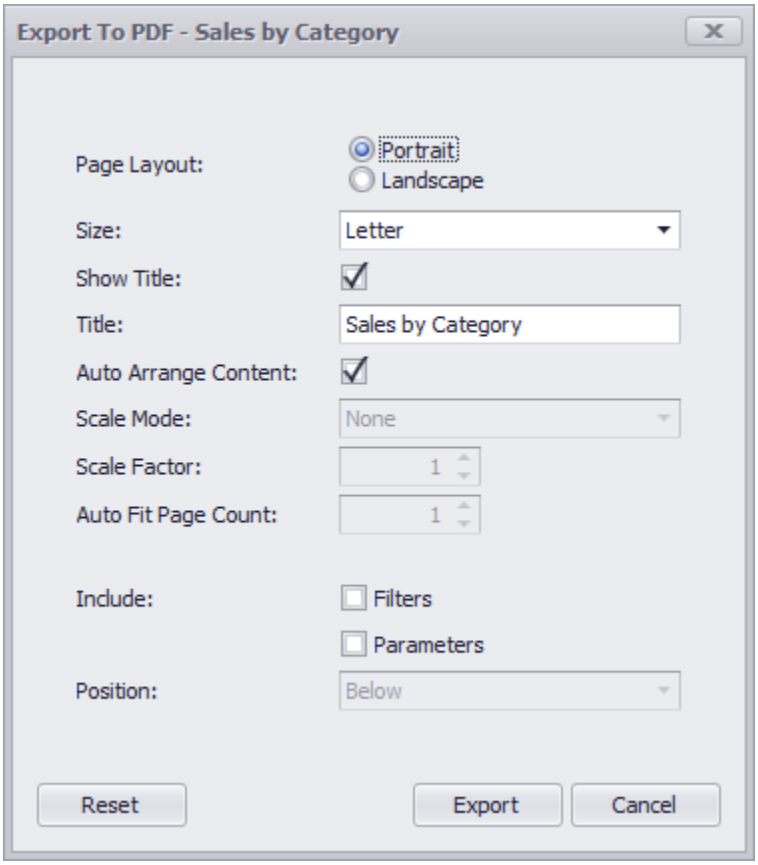
If you are printing the Pie dashboard item using the Print Preview, you can customize the following options (via the **Options** button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Auto Arrange Content** - Specifies whether pies are arranged automatically on the printed document.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

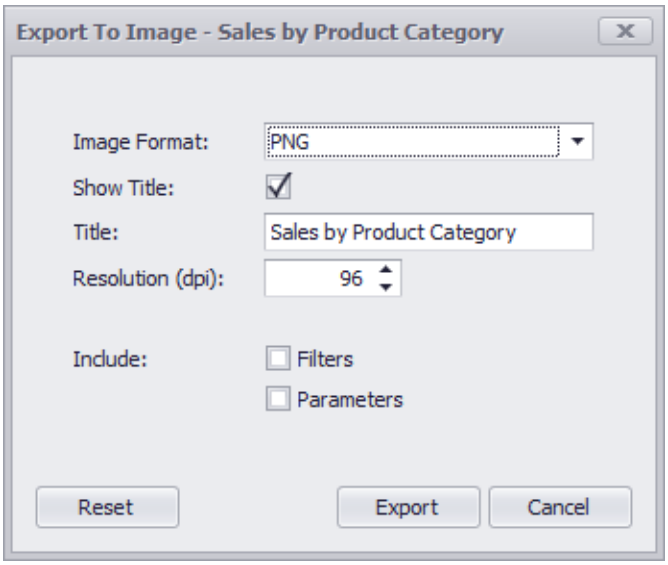


- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the dashboard item caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Auto Arrange Content** - Specifies whether pies are arranged automatically in the exported document.
- **Scale Mode** - Specifies the mode for scaling when exporting a dashboard item.
- **Scale Factor** - Specifies the scale factor (in fractions of 1) by which a dashboard item is scaled.
- **Auto Fit Page Count** - Specifies the number of horizontal/vertical pages spanning the total width/height of a dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Pie dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:



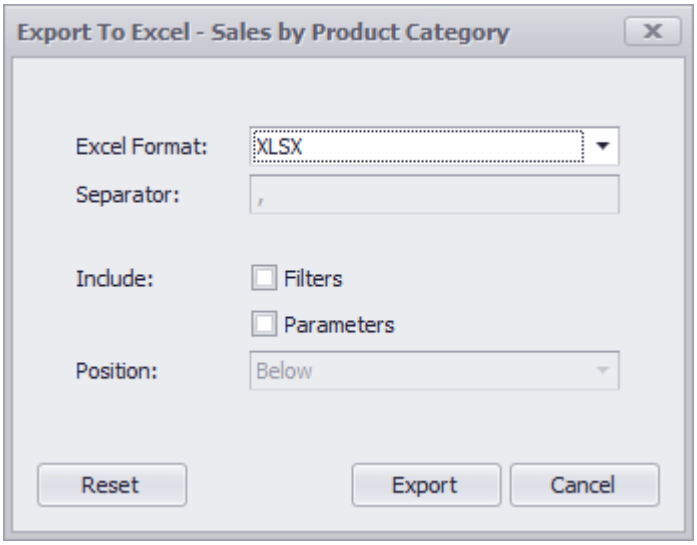
Show Title - Specifies whether to apply the dashboard item caption to the exported document title.

- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:



- **Excel Format** - Specifies the Excel format in which the dashboard item is exported. You can use the XLSX, XLS or CSV formats.
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document.

- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

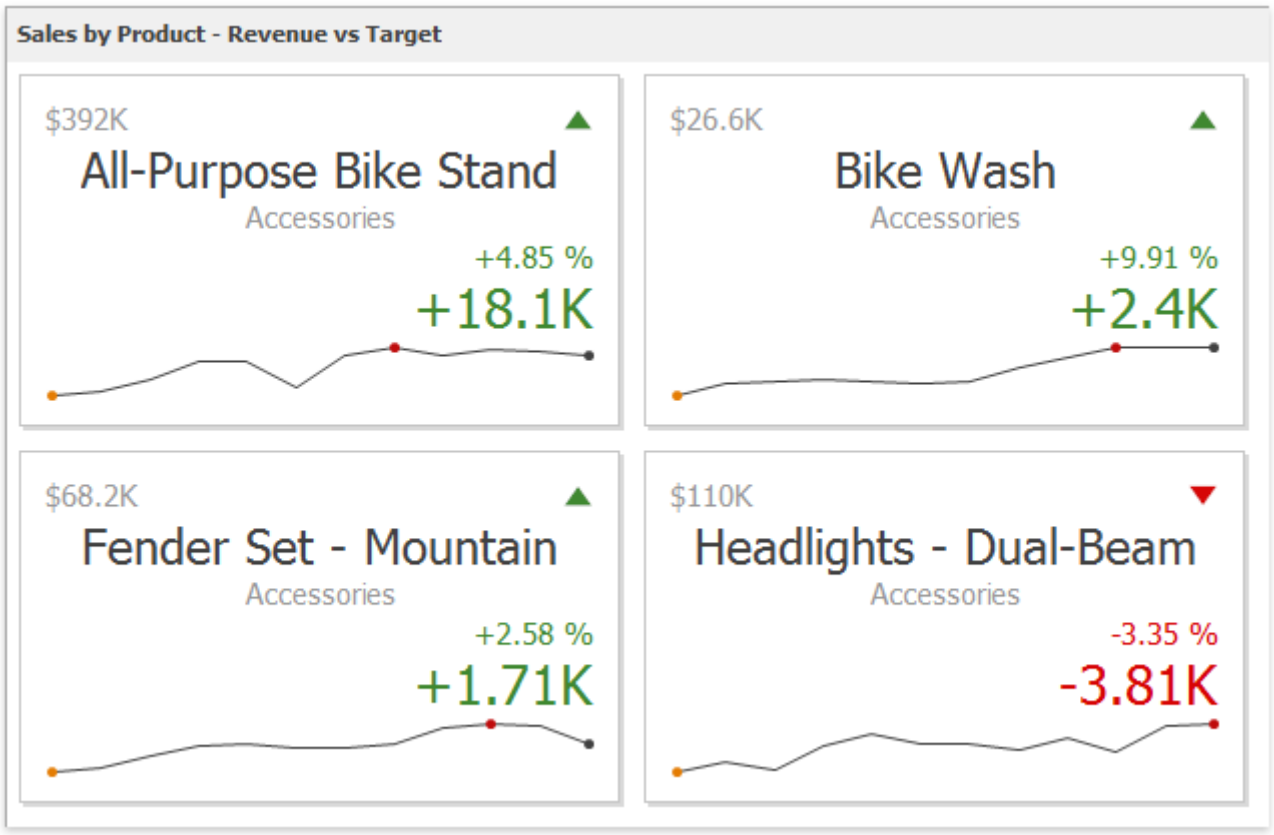
Cards

The topics in this section describe the Card dashboard item, which displays a series of cards. Each card can display a single value, or show the difference between two values.

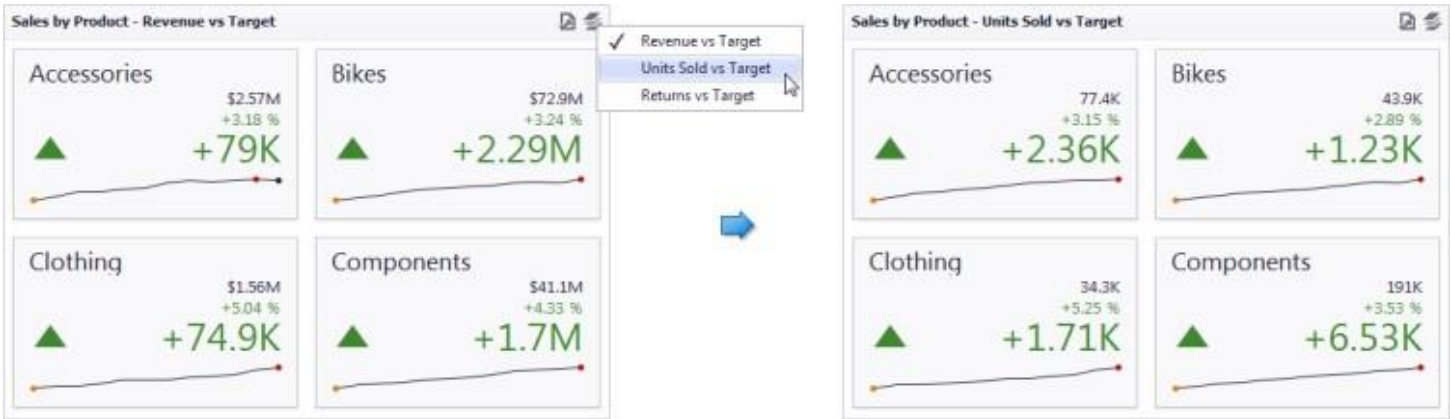
- Data Presentation
- Basics Interactivity
- Printing and Exporting

Data Presentation Basics

The Card dashboard item displays a series of cards. Each card illustrates the difference between two values. This difference can be expressed as an absolute value, an absolute variation or a percentage variation.



The **Card** dashboard item can illustrate this difference for various sets of values. You can switch between these sets using the **Values** button (the icon) in the dashboard item caption area or in the context menu.



Tooltip

A **Card** dashboard item can display a tooltip for cards containing a sparkline. When the mouse pointer is hovered over the sparkline, the tooltip can display start/end values and minimum/maximum values.

Rear Derailleur
Components
$295K
+0.29 %
+850
Start: $21.4K
End: $28.5K
Min: $20K
Max: $29.5K

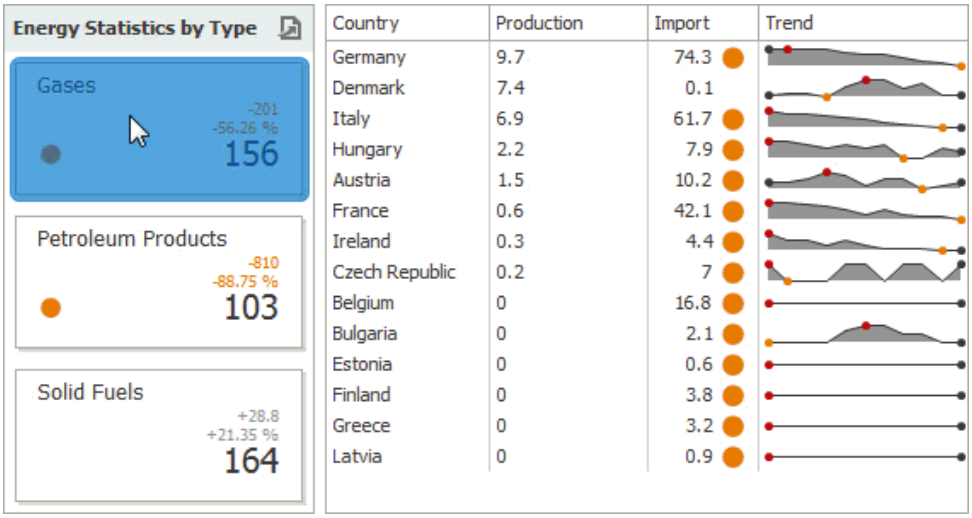
Interactivity

This topic describes features that enable interaction between the Card and other dashboard items. These features include Master Filtering and Drill-Down.

Master Filtering

The **Dashboard** allows you to use any data aware dashboard item as a filter for other dashboard items (**Master Filter**). To learn more, see the Master Filtering topic, which describes filtering concepts common to all dashboard items.

When Master Filtering is enabled, you can click a card (or multiple cards by holding down the **CTRL** key) to make other dashboard items only display data related to the selected card(s).

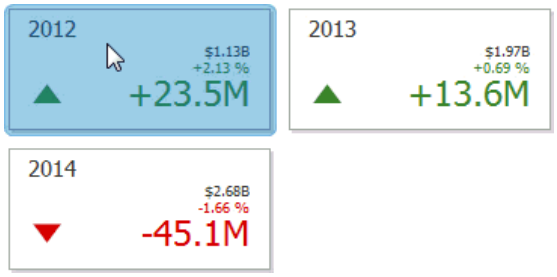


To reset filtering, use the **Clear Master Filter** button (the icon) in the caption area of the **Card** dashboard item, or the **Clear Master Filter** command in the context menu.

Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more, see Drill-Down.

When drill-down is enabled, you can click a card to view the details.



Note

When **Master Filtering** is enabled, you can view the details by double-clicking a card.

To return to the previous detail level (drill up), use the **Drill Up** button (the icon) in the caption area of the **Card** dashboard item, or the **Drill Up** command in the context menu.

Printing and Exporting

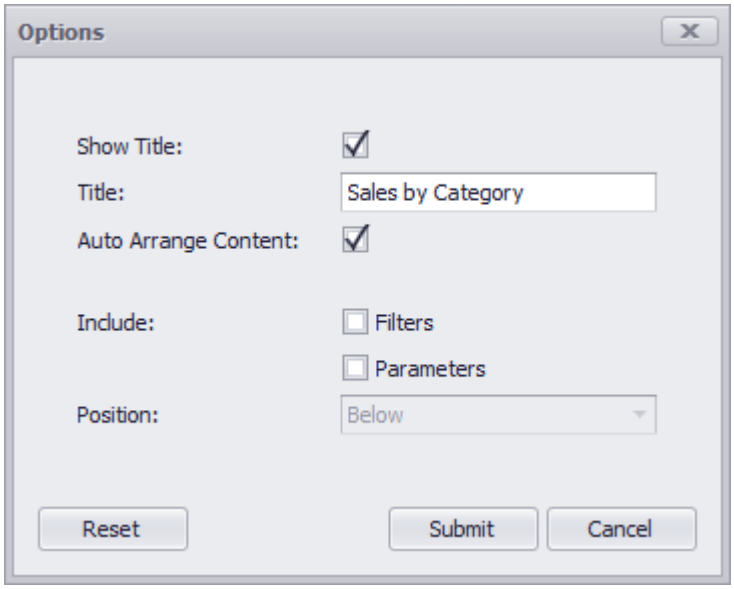
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a Card dashboard item.

- Printing
- Export
  To PDF
- Export To Image
- Export To Excel

Printing

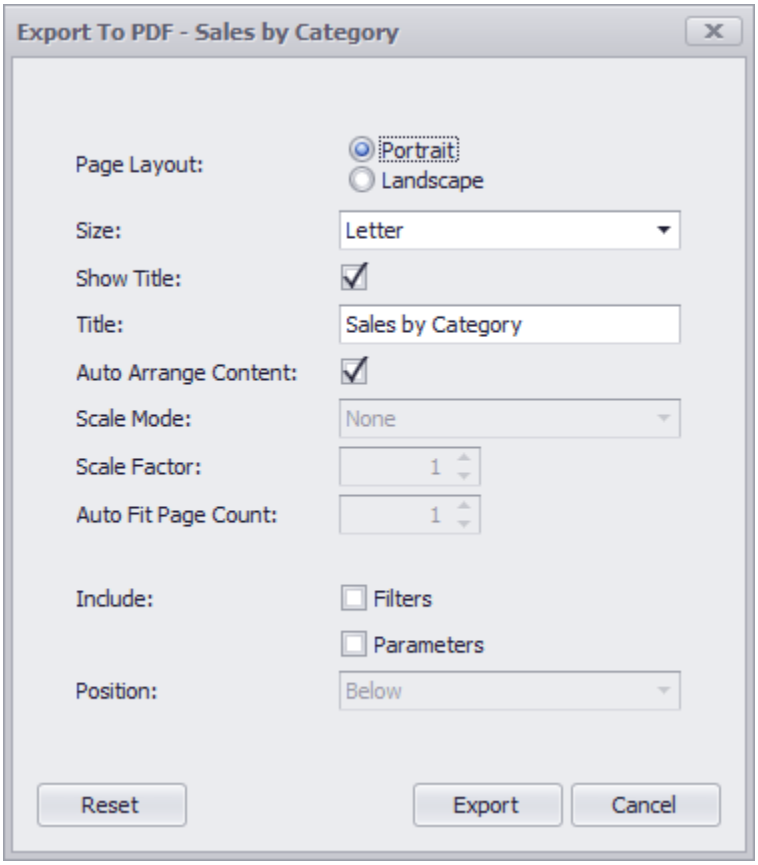
If you are printing the Card dashboard item using a Print Preview, you can customize the following options (via the **Options** button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Auto Arrange Content** - Specifies whether or not cards are arranged automatically on the printed document.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

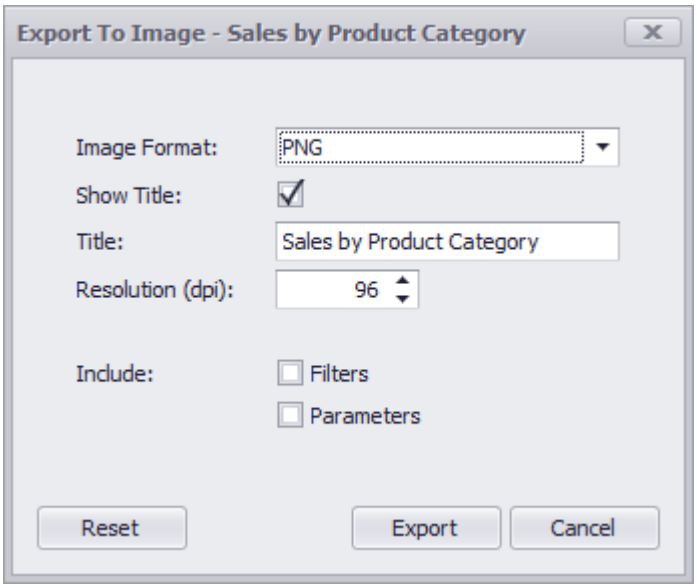


- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the dashboard item caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Auto Arrange Content** - Specifies whether or not cards are arranged automatically in the exported document.
- **Scale Mode** - Specifies the mode for scaling when exporting a dashboard item.
- **Scale Factor** - Specifies the scale factor (in fractions of 1) by which a dashboard item is scaled.
- **Auto Fit Page Count** - Specifies the number of horizontal/vertical pages spanning the total width/height of a dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Card dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:

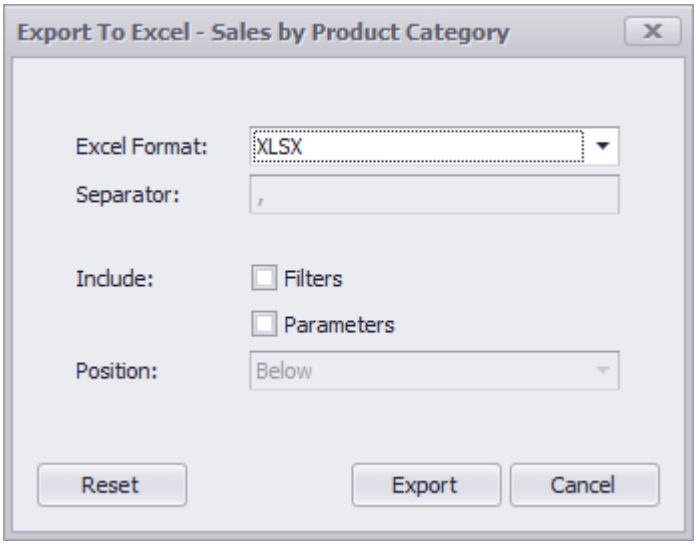


- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:



Excel Format - Specifies the Excel format in which the dashboard item is exported. You can use the XLSX, XLS or CSV formats.

-
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

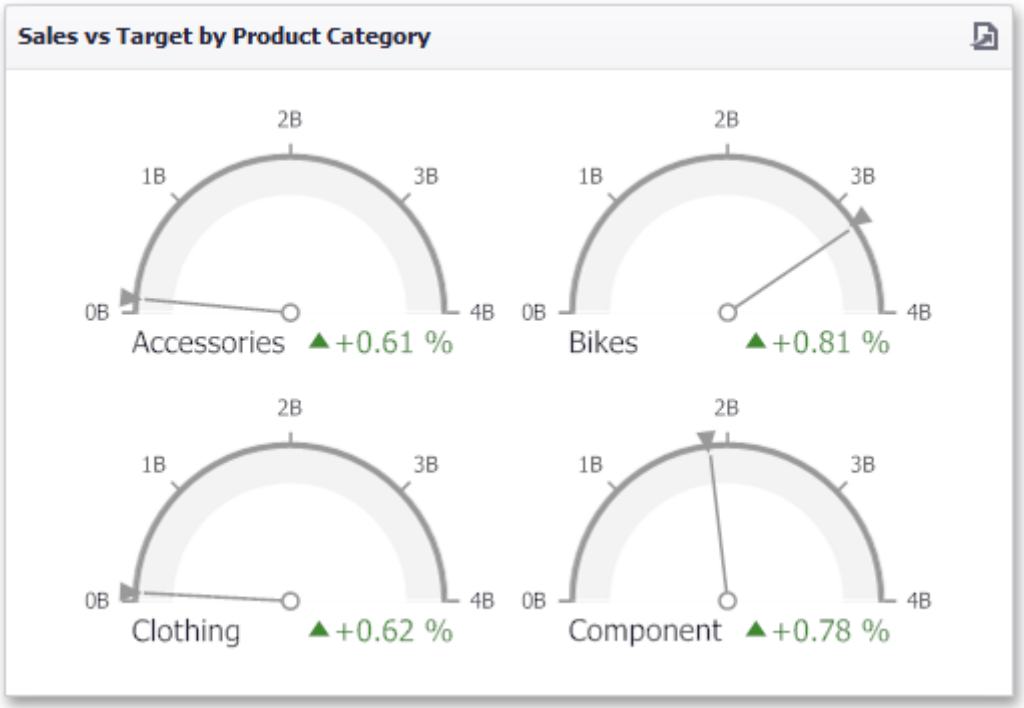
Gauges

The topics in this section describe the **Gauge** dashboard item, which displays a series of gauges.

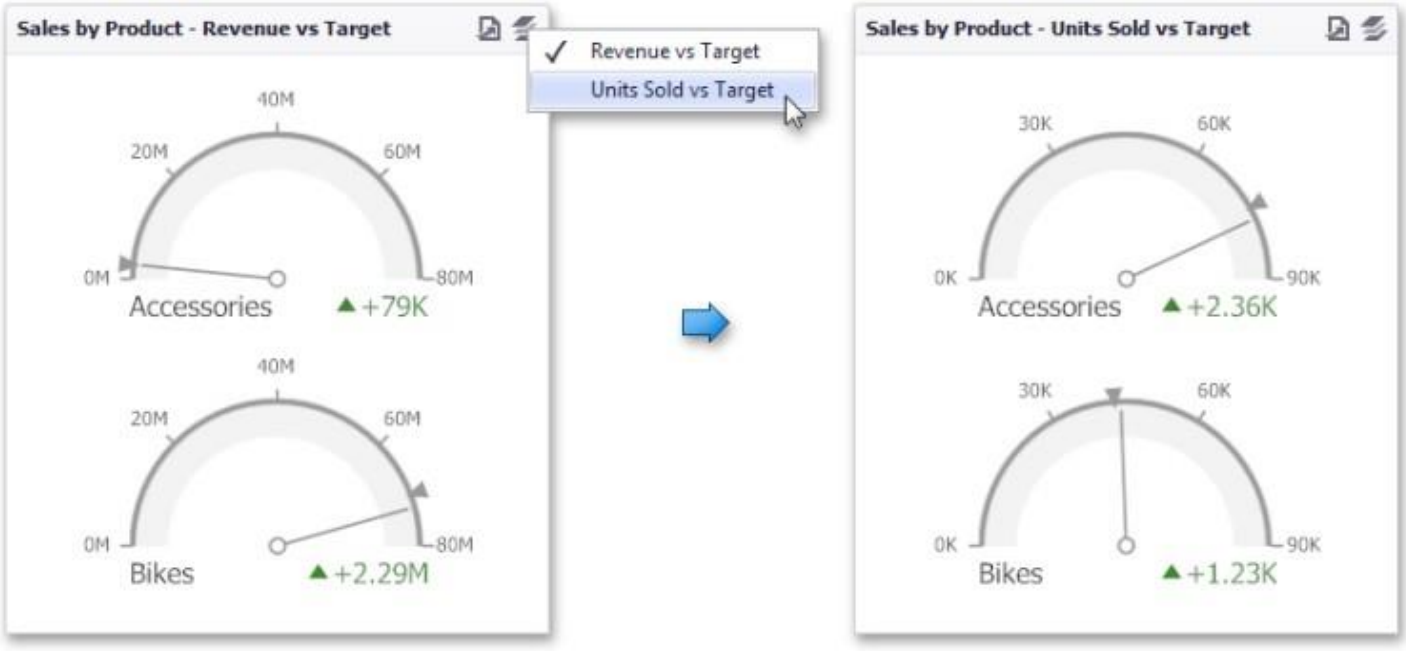
- Data Presentation
- Basics Interactivity
- Printing and Exporting

Data Presentation Basics

The Gauge dashboard item displays a series of gauges. Each gauge can communicate two values - one with a needle and the other with a marker on the scale.



The Gauge dashboard item can illustrate the difference for various sets of values. You can switch between these sets using the Values button (the icon) in the dashboard item caption or in the context menu.



Interactivity

This topic describes features that enable interaction between the Gauge and other dashboard items. These features include Master Filtering and Drill-Down.

Master Filtering

The **Dashboard** allows you to use any data aware dashboard item as a filter for other dashboard items (**Master Filter**). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

When **Master Filtering** is enabled, you can click a gauge (or multiple gauges by holding down the **CTRL** key) to make other dashboard items only display data related to the selected gauge(s).

To reset filtering, use the **Clear Master Filter** button (the icon) in the caption area of the **Gauge** dashboard item, or the **Clear Master Filter** command in the context menu.

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more, see Drill-Down.

When drill-down is enabled, you can click a gauge to view the details.

Note

When **Master Filtering** is enabled, you can view the details by double-clicking a gauge.

To return to the previous detail level (drill up), use the Drill Up button (the icon) in the caption area of the Gauge dashboard item, or the Drill Up command in the context menu.

Printing and Exporting

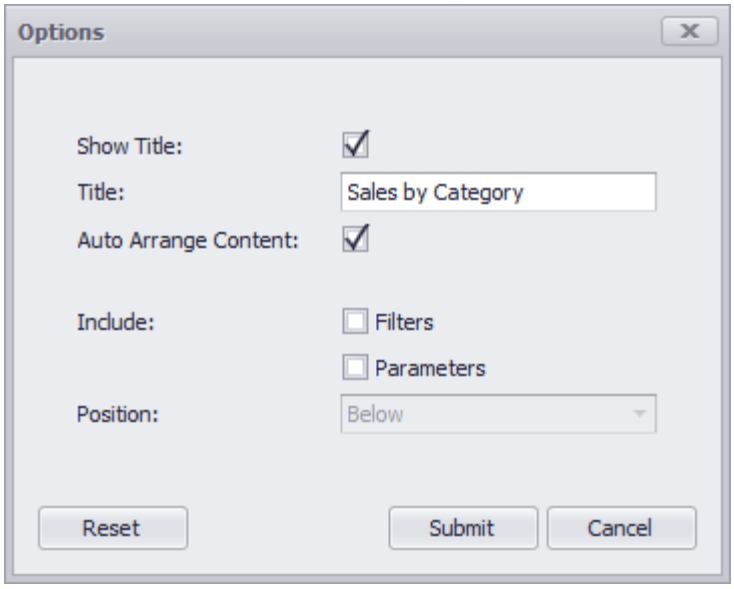
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a **Gauge** dashboard item.

- Printing
- Export
  To PDF
- Export To Image
- Export To Excel

Printing

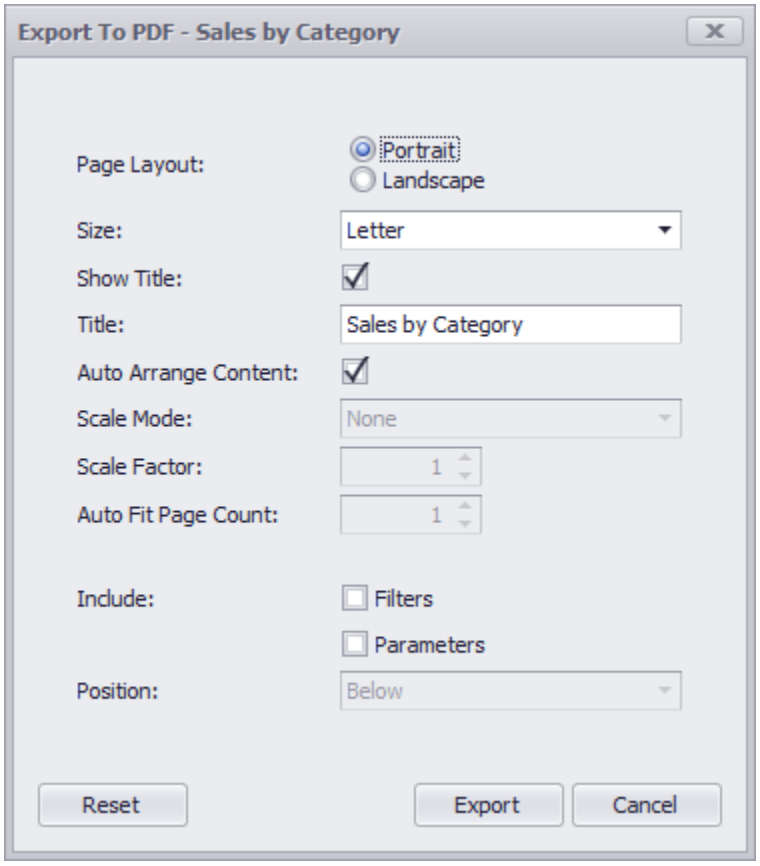
If you are printing a Gauge dashboard item using the Print Preview, you can customize the following options (via the **Options** button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Auto Arrange Content** - Specifies whether or not gauges are arranged automatically on the printed document.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

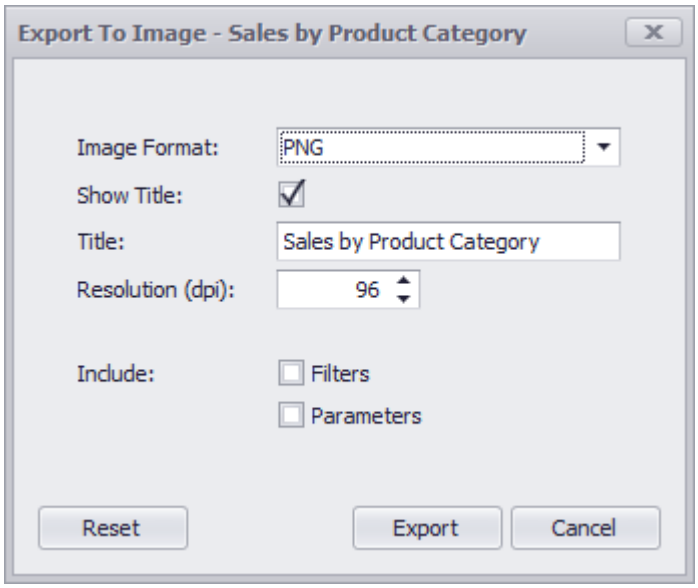


- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the Gauge caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Auto Arrange Content** - Specifies whether or not gauges are arranged automatically in the exported document.
- **Scale Mode** - Specifies the mode for scaling when exporting a dashboard item.
- **Scale Factor** - Specifies the scale factor (in fractions of 1) by which a dashboard item is scaled.
- **Auto Fit Page Count** - Specifies the number of horizontal/vertical pages spanning the total width/height of a dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Gauge dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:



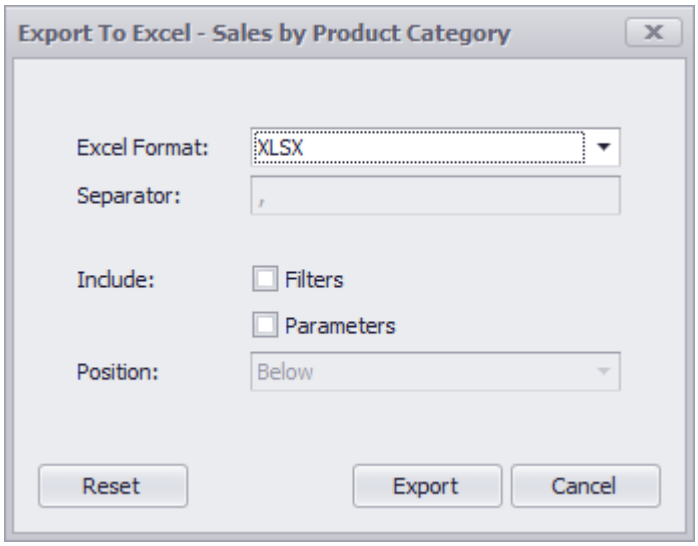
- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the Export button to export the dashboard item. Click the

Reset button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:

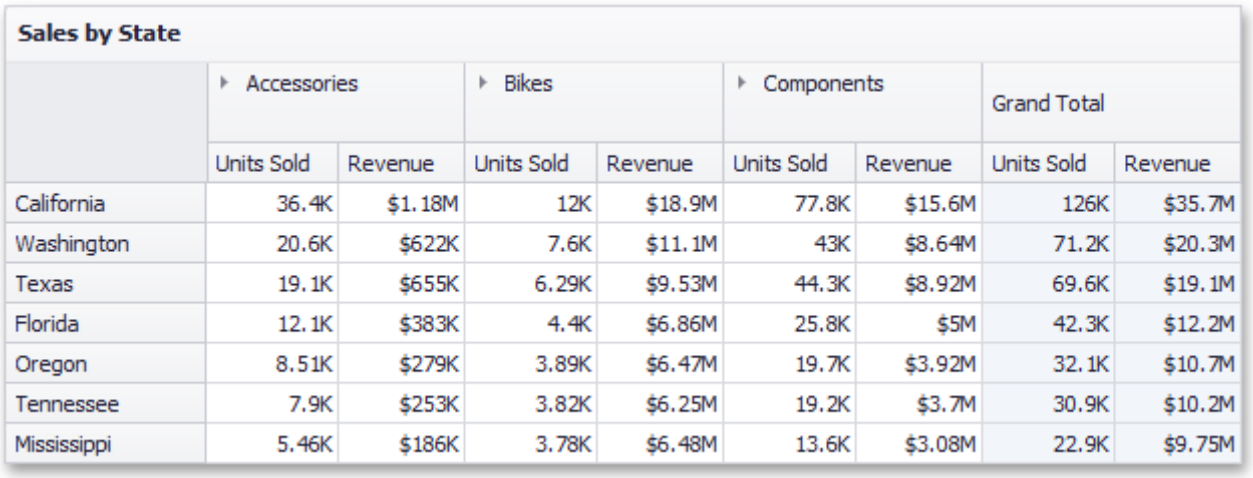


- **Excel Format** - Specifies the Excel format in which the dashboard item is exported. You can use the XLSX, XLS or CSV formats.
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Pivot

The Pivot dashboard item displays a cross-tabular report that presents multi-dimensional data in an easy-to-read format.

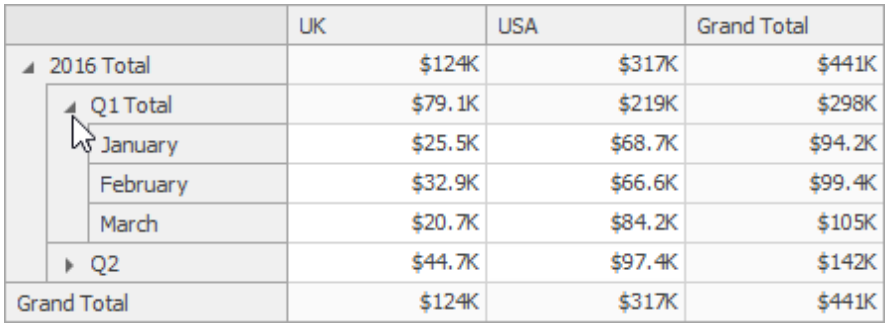


Sales by State

	Accessories		Bikes		Components		Grand Total	
	Units Sold	Revenue	Units Sold	Revenue	Units Sold	Revenue	Units Sold	Revenue
California	36.4K	$1.18M	12K	$18.9M	77.8K	$15.6M	126K	$35.7M
Washington	20.6K	$622K	7.6K	$11.1M	43K	$8.64M	71.2K	$20.3M
Texas	19.1K	$655K	6.29K	$9.53M	44.3K	$8.92M	69.6K	$19.1M
Florida	12.1K	$383K	4.4K	$6.86M	25.8K	$5M	42.3K	$12.2M
Oregon	8.51K	$279K	3.89K	$6.47M	19.7K	$3.92M	32.1K	$10.7M
Tennessee	7.9K	$253K	3.82K	$6.25M	19.2K	$3.7M	30.9K	$10.2M
Mississippi	5.46K	$186K	3.78K	$6.48M	13.6K	$3.08M	22.9K	$9.75M

Expanding and Collapsing Groups

To expand and collapse row and column groups, use the and buttons, respectively.



	UK	USA	Grand Total
2016 Total	$124K	$317K	$441K
Q1 Total	$79.1K	$219K	$298K
January	$25.5K	$68.7K	$94.2K
February	$32.9K	$66.6K	$99.4K
March	$20.7K	$84.2K	$105K
Q2	$44.7K	$97.4K	$142K
Grand Total	$124K	$317K	$441K

See Also

Printing and Exporting

Printing and Exporting

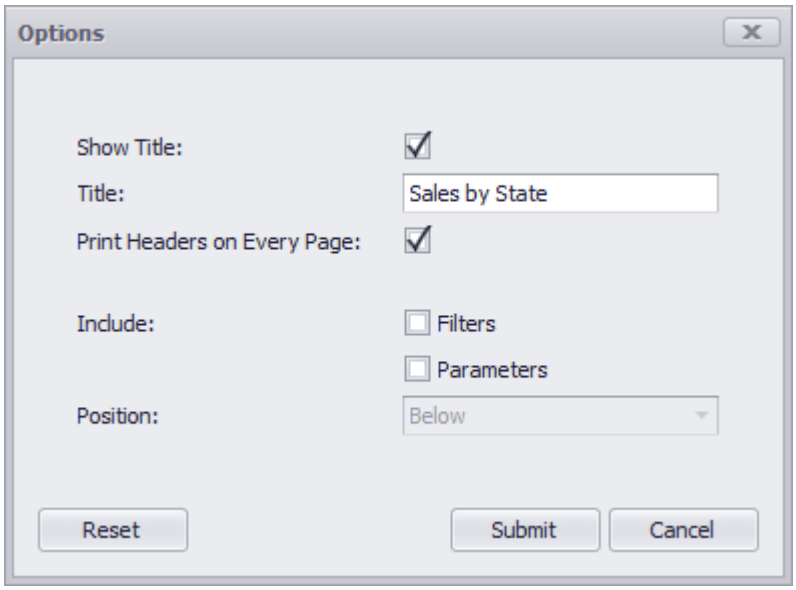
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing and exporting concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a Pivot dashboard item.

- Printing
- Export To PDF
- Export To Image
- Export To Excel

Printing

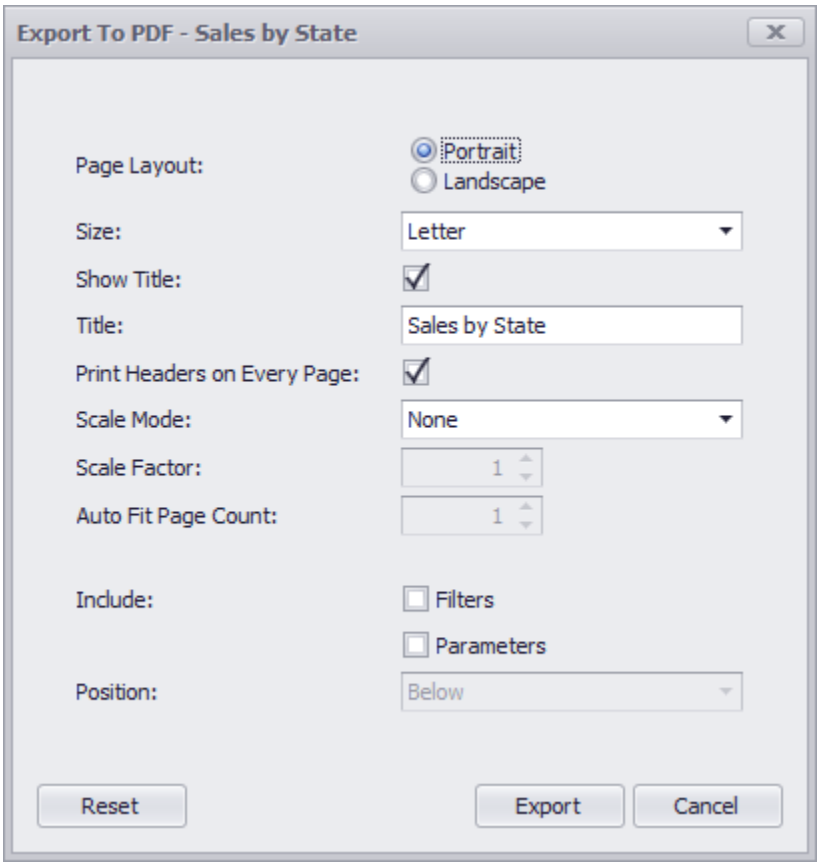
If you are printing the Pivot dashboard item using the Print Preview, you can customize the following options (via the Options button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Print Headers on Every Page** - Specifies whether to print column headers of the Pivot dashboard item on every page.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

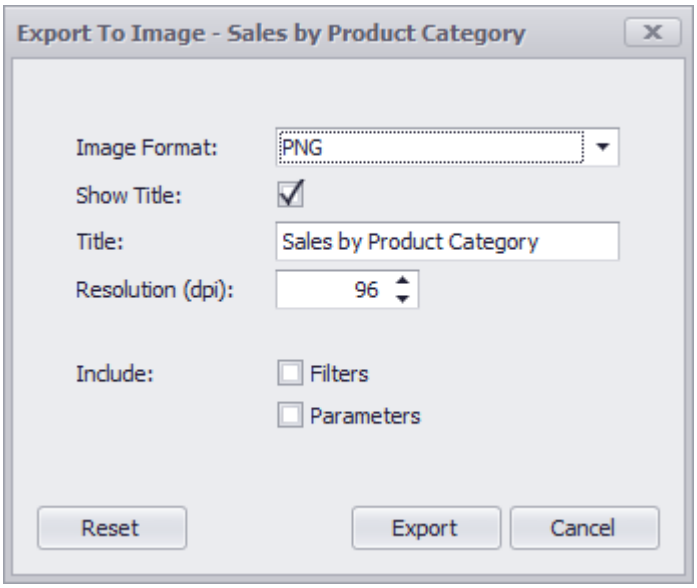


- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the Pivot caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Print Headers on Every Page** - Specifies whether or not to print column headers of the Pivot dashboard item on every page.
- **Scale Mode** - Specifies the mode for scaling when exporting a dashboard item.
- **Scale Factor** - Specifies the scale factor (in fractions of 1) by which a dashboard item is scaled.
- **Auto Fit Page Count** - Specifies the number of horizontal/vertical pages spanning the total width/height of a dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Pivot dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:

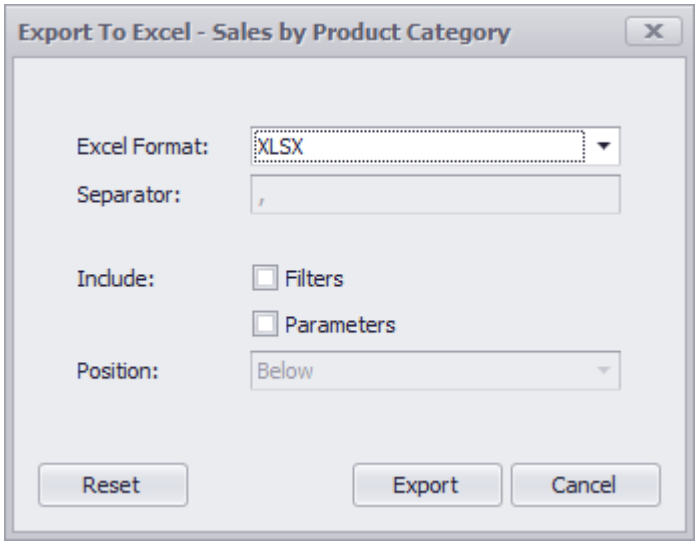


- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:



Excel Format - Specifies the Excel format in which the dashboard item is exported. You can use the

- XLSX, XLS or CSV formats.
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

See Also

Printing and Exporting

Choropleth Map

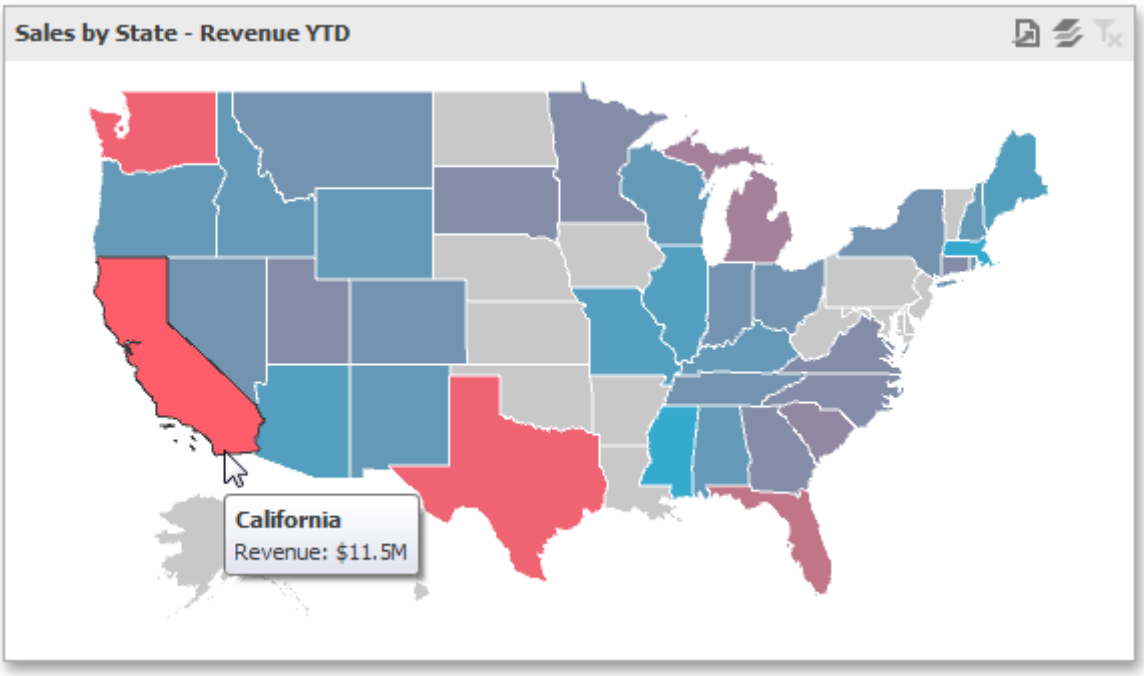
The topics in this section describe the **Choropleth Map** dashboard item, which colorizes the required areas in proportion to the provided values.

- Data Presentation
- Basics Interactivity
- Printing and Exporting

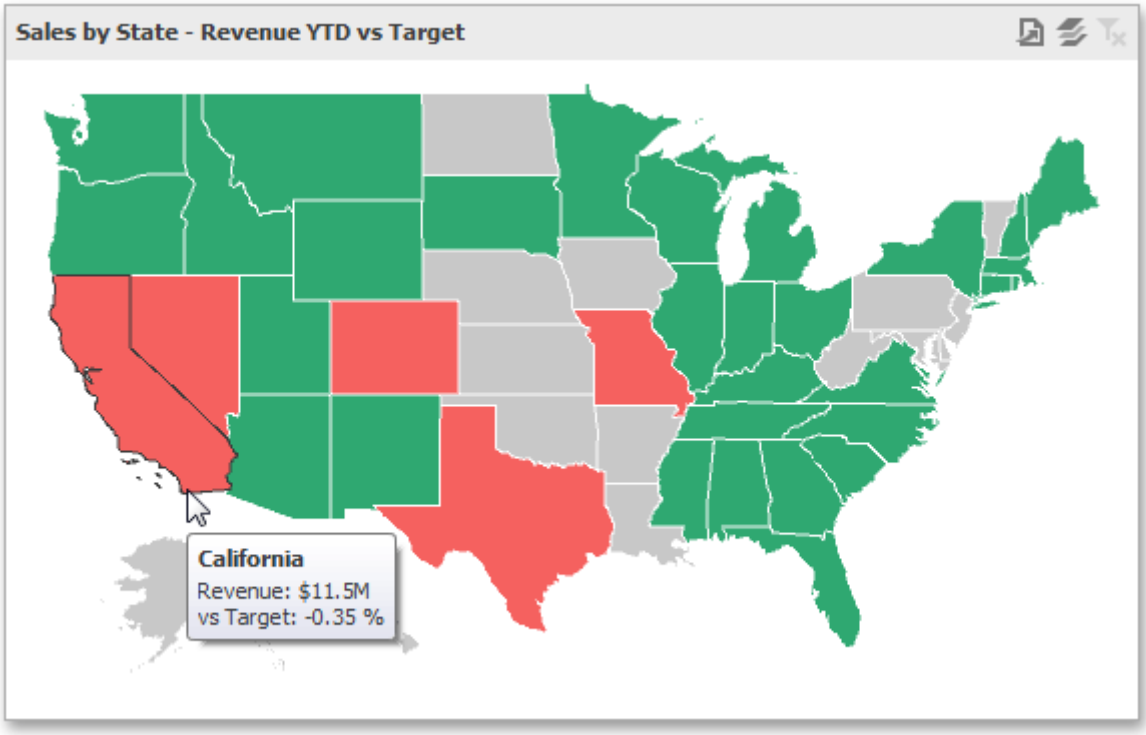
Data Presentation Basics

The **Choropleth Map** dashboard item colorizes map areas in the following two ways.

- Based on the values provided.



- By indicating the difference between the actual and target values of a particular parameter.

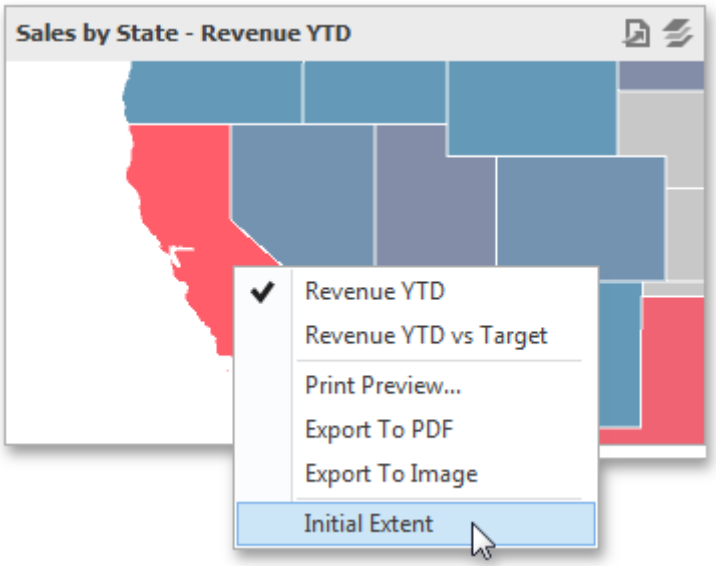


You can switch between the provided values using the **Values** button (the icon) in the map's caption area, or by using the context menu.

Map Zooming and Scrolling

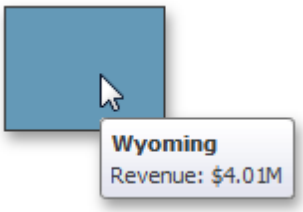
You can use the mouse wheel to change the current zoom level for the map. To scroll the map, hold down the left mouse button and drag it.

To move to the initial zooming and scrolling state, select the **Initial Extent** menu item in the map's context menu.



Tooltip

The **Choropleth Map** dashboard item can display a tooltip that shows information on a hovered area.



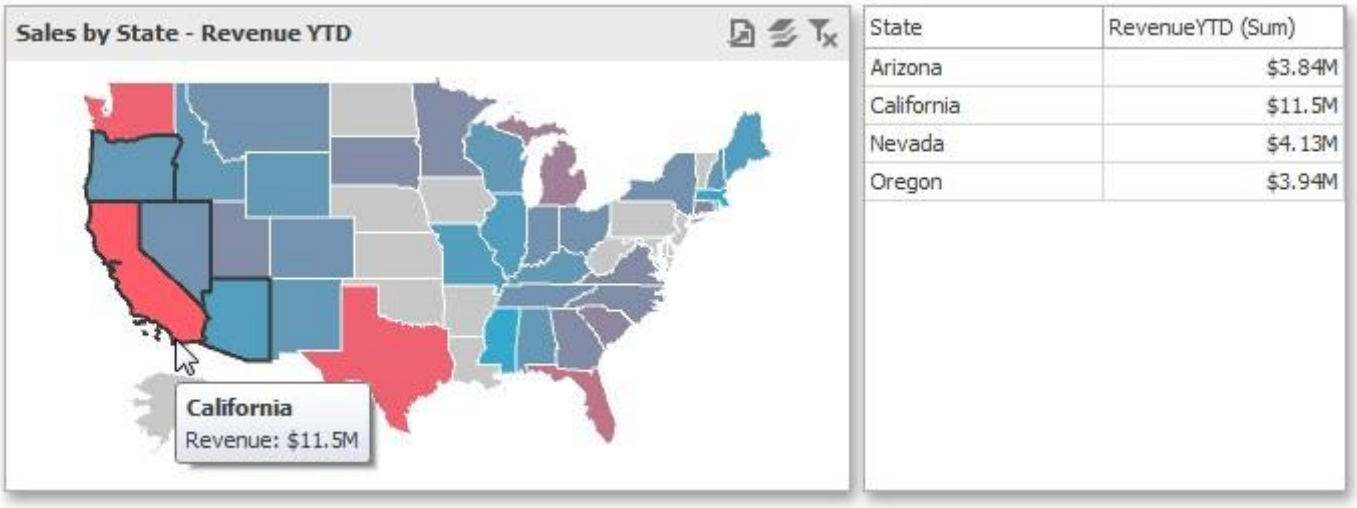
Interactivity

This document describes the features that enable interaction between the Choropleth Map and other dashboard items. These features include Master Filtering.

Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

When Master Filtering is enabled, you can click a shape (or multiple shapes by holding down the CTRL key) to make other dashboard items only display data related to the selected shape(s).



You can also select multiple shapes in the following way. Hold the **SHIFT** key and the left

- mouse button;
- Drag the mouse pointer to mark an area that includes the desired
- shapes; Release the left mouse button. All shapes within the area will be selected.

To reset filtering, use the Clear Master Filter button (the icon) in the Map's caption, or the Clear Master Filter command in the context menu.

Printing and Exporting

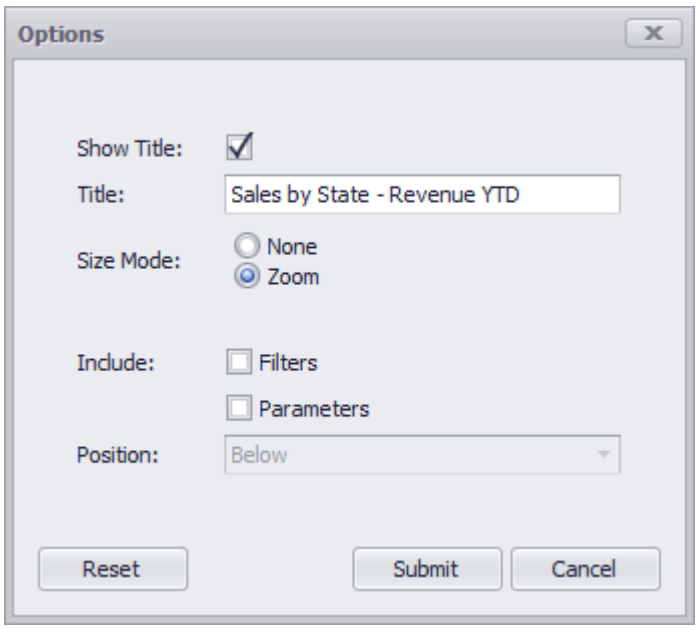
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing and exporting concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a Choropleth Map dashboard item.

- Printing
- Export To PDF
- Export To Image
- Export To Excel

Printing

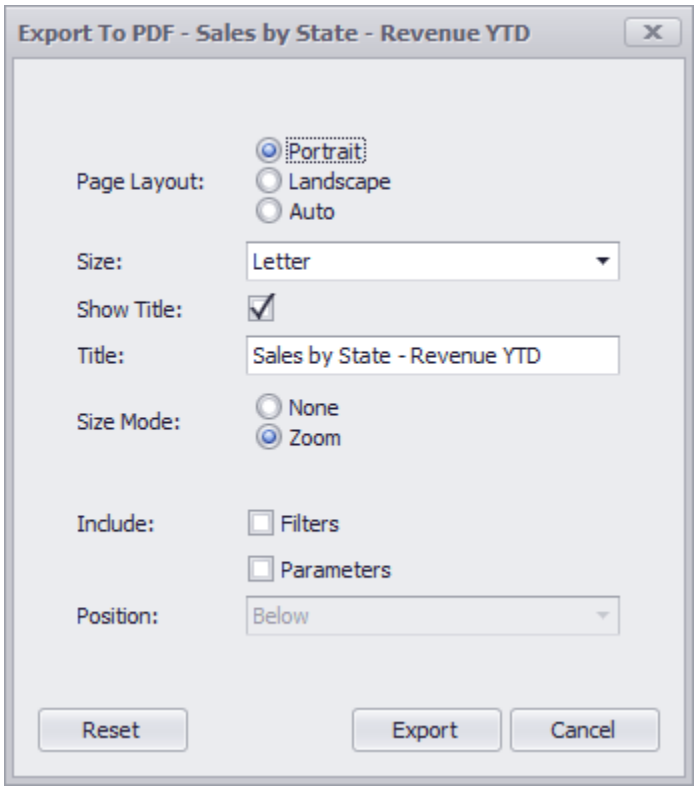
If you are printing the Choropleth Map dashboard item using the Print Preview, you can customize the following options (via the **Options** button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Size Mode** - Allows you to specify the print size mode for the Choropleth Map dashboard item.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

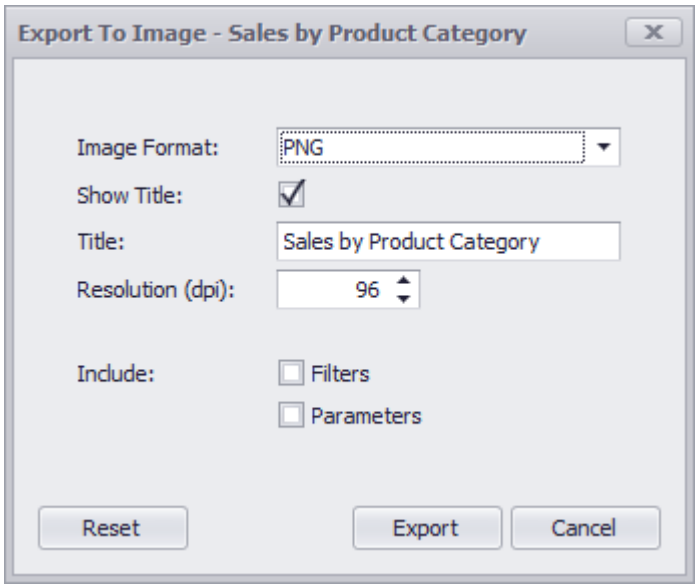


- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the Choropleth Map caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Size Mode** - Specifies the export size mode for the Choropleth Map dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported
- document. **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the Export button to export the Choropleth Map dashboard item. To reset changes to the default values, click the Reset button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available

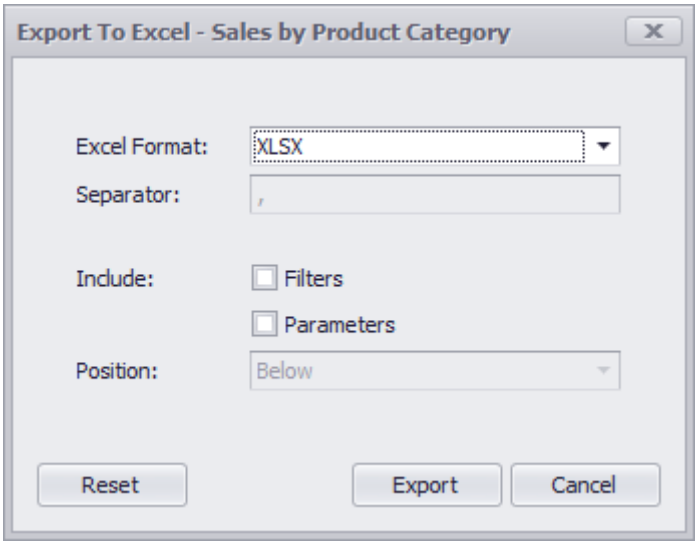


- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:



Excel Format - Specifies the Excel format in which the dashboard item is exported. You can use the

- XLSX, XLS or CSV formats.
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Geo Point Maps

The topics in this section describe various types of **Geo Point Map** dashboard items which places callouts, bubbles or pies on the map using geographical coordinates.

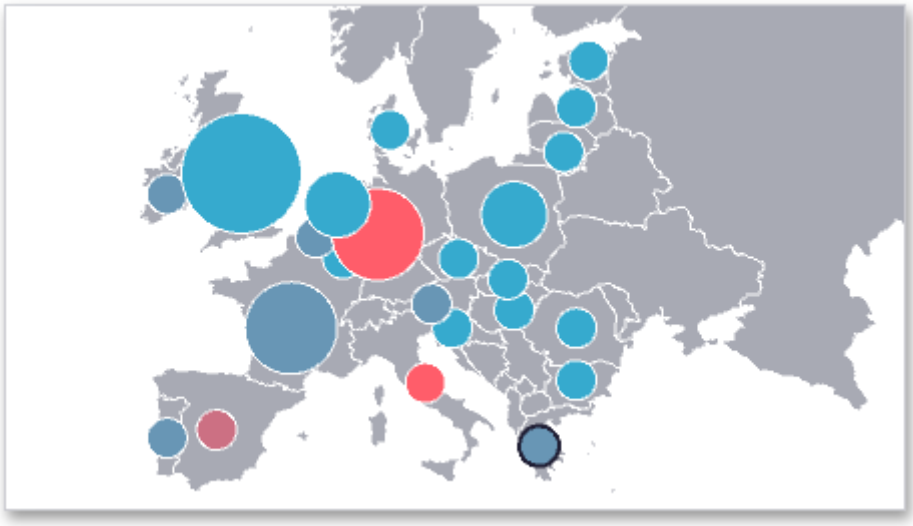
- Data Presentation
- Basics Interactivity
- Printing and Exporting

Data Presentation Basics

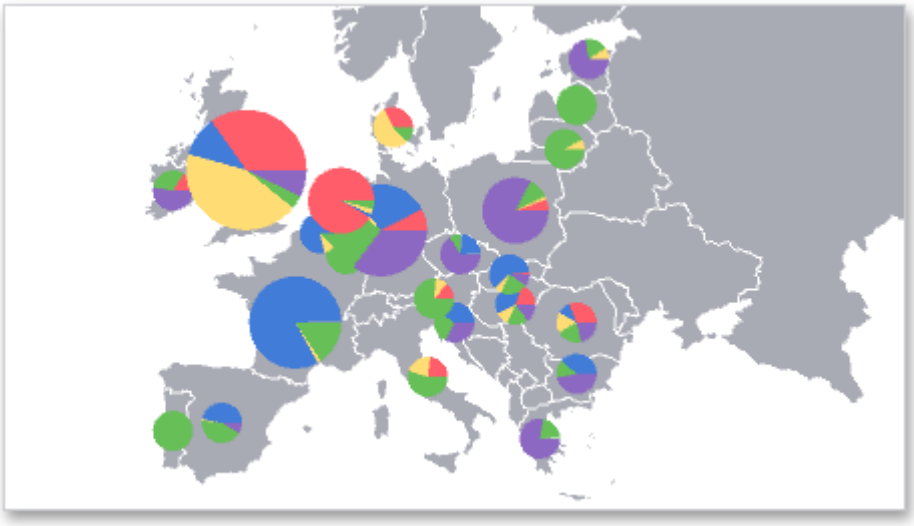
The **Dashboard** supports three types of **Geo Point** maps.

- The **Geo Point Map** dashboard item allows you to place callouts on the map using geographical coordinates.

- The **Bubble Map** dashboard item allows you to place bubbles on the map. Each bubble can represent data via its weight and color.



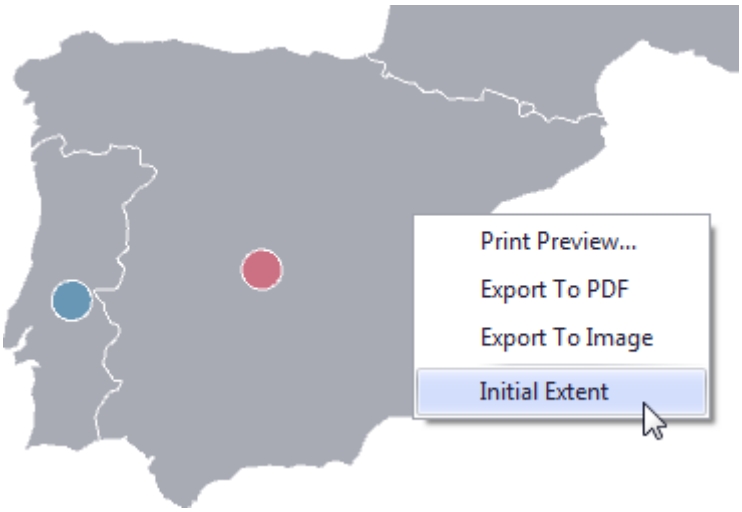
- The **Pie Map** dashboard item allows you to display pies on the map. Each pie visualizes the contribution of each value to the total.



Map Zooming and Scrolling

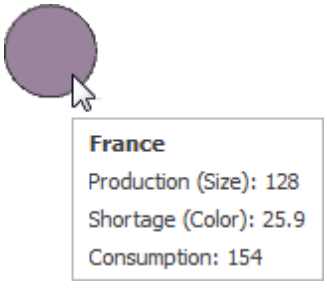
You can use the mouse wheel to change the current zoom level for a map. To scroll the map, hold down the left mouse button and drag it.

To move to the initial zooming and scrolling state, click the **Initial Extent** menu item in the map's context menu.



Tooltip

A **Geo Point Map** dashboard item can display a tooltip that shows information on a hovered callout/bubble/pie.



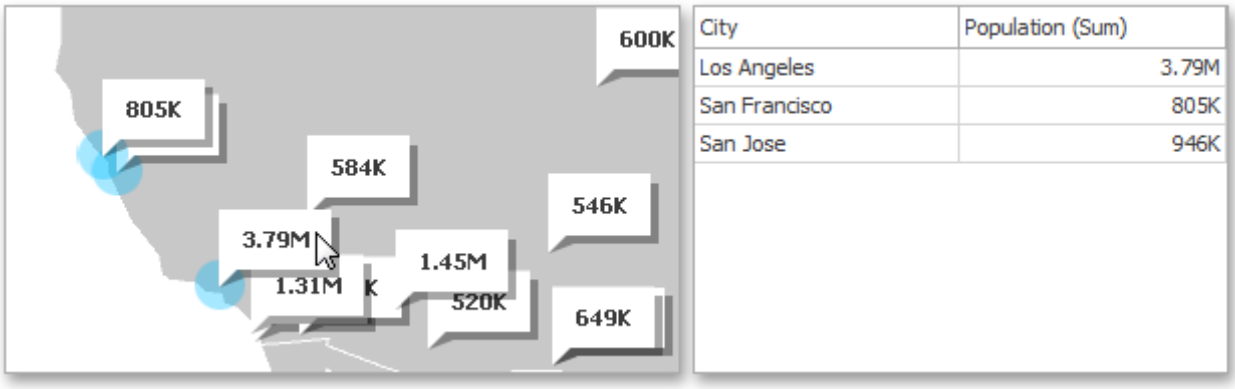
Interactivity

This document describes the capabilities that enable interaction between Geo Point maps and other dashboard items. These capabilities include Master Filtering.

Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

When Master Filtering is enabled, you can click a callout/bubble/pie (or multiple callouts/bubbles/pies by holding down the CTRL key) to make other dashboard items only display data related to the selected callout(s)/bubble(s)/ pie(s).



City	Population (Sum)
Los Angeles	3.79M
San Francisco	805K
San Jose	946K

You can also select multiple callouts/bubbles/pies in the following way.

- Hold the **SHIFT** key and the left mouse button;
- Drag the mouse pointer, to mark an area that includes the desired elements;
- Release the left mouse button. All elements within the area will be selected.

To reset filtering, use the Clear Master Filter button (the icon) in the Map's caption area, or the Clear Master Filter command in the context menu.

Printing and Exporting

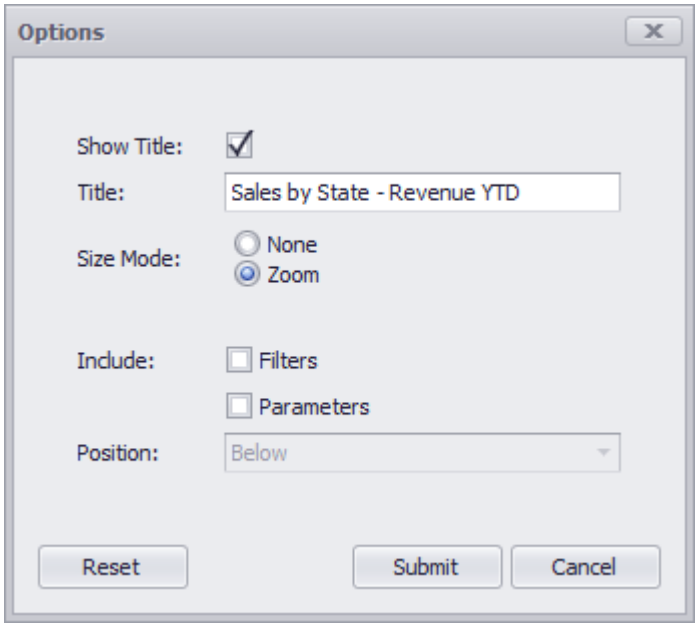
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing and exporting concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a Geo Point Map dashboard items.

- Printing
- Export
  To PDF
- Export To Image
- Export To Excel

Printing

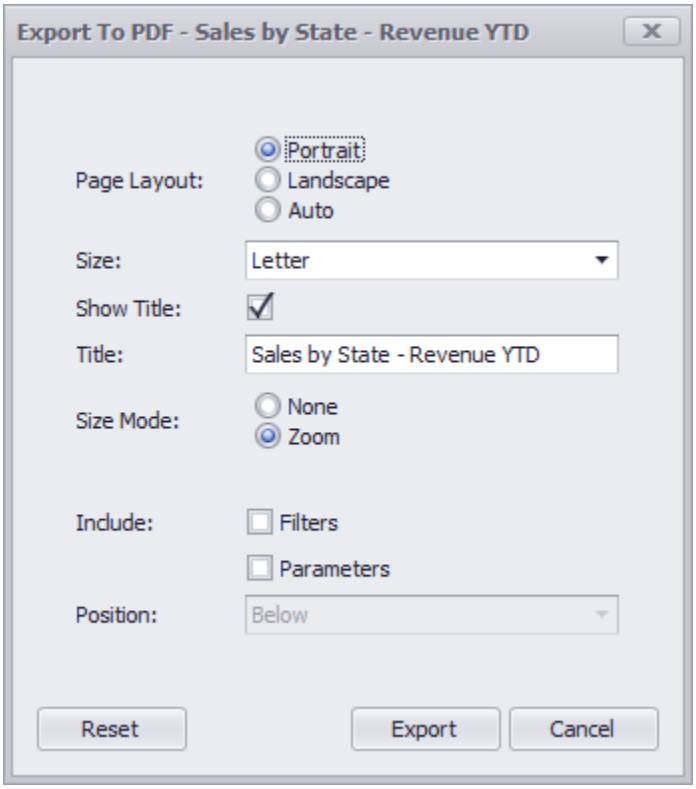
If you are printing the Geo Point Map dashboard item using the Print Preview, you can customize the following options (via the Options button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Size Mode** - Allows you to specify the print size mode for the Geo Point Map dashboard item.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

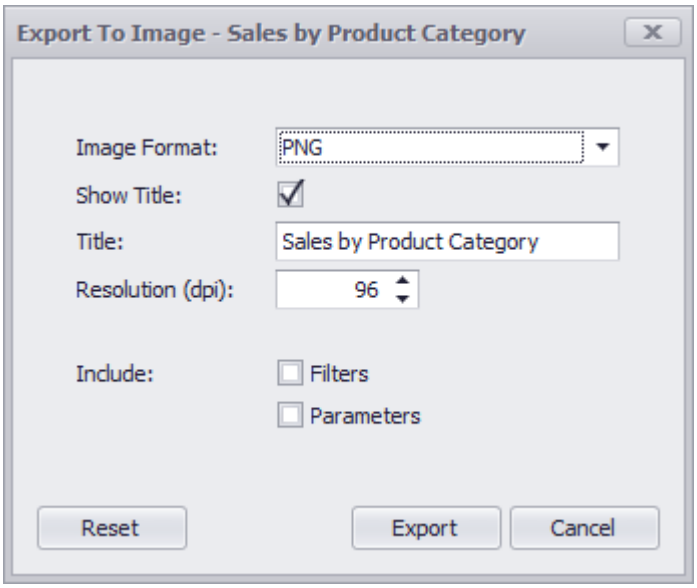


- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the Geo Point Map caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Size Mode** - Specifies the export size mode for the Geo Point Map dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported
- document. **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Geo Point Map dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:

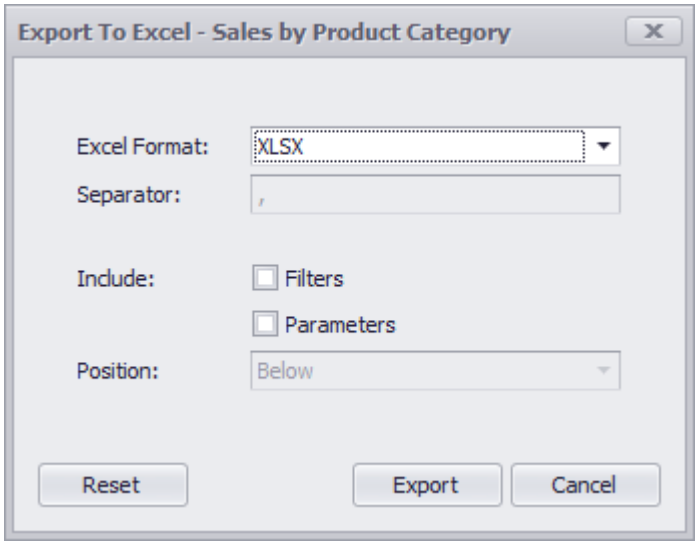


- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:

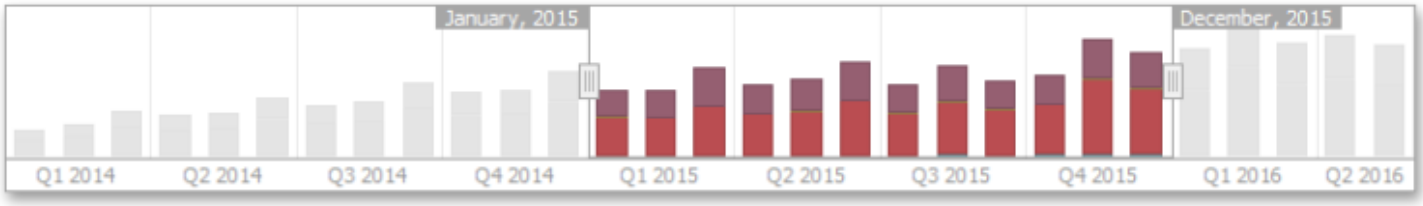


- **Excel Format** - Specifies the Excel format in which the dashboard item is exported. You can use the XLSX, XLS or CSV formats.
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Range Filter

The Range Filter dashboard item allows you to apply filtering to other dashboard items. This item displays a chart with selection thumbs that allow you to filter out values displayed along the argument axis.



To reset filtering, use the Clear Master Filter command in the context menu.

See Also

Printing and Exporting

Printing and Exporting

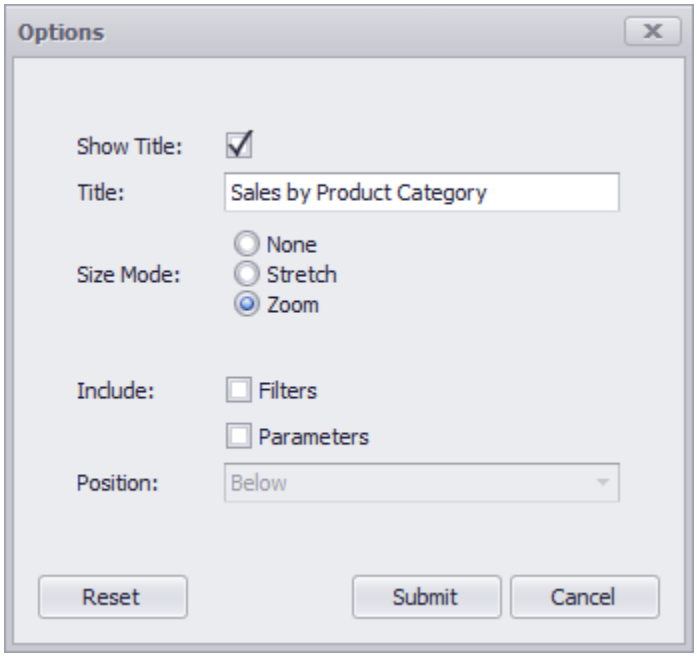
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing and exporting concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a Range Filter dashboard item.

- Printing
- Export To PDF
- Export To Image
- Export To Excel

Printing

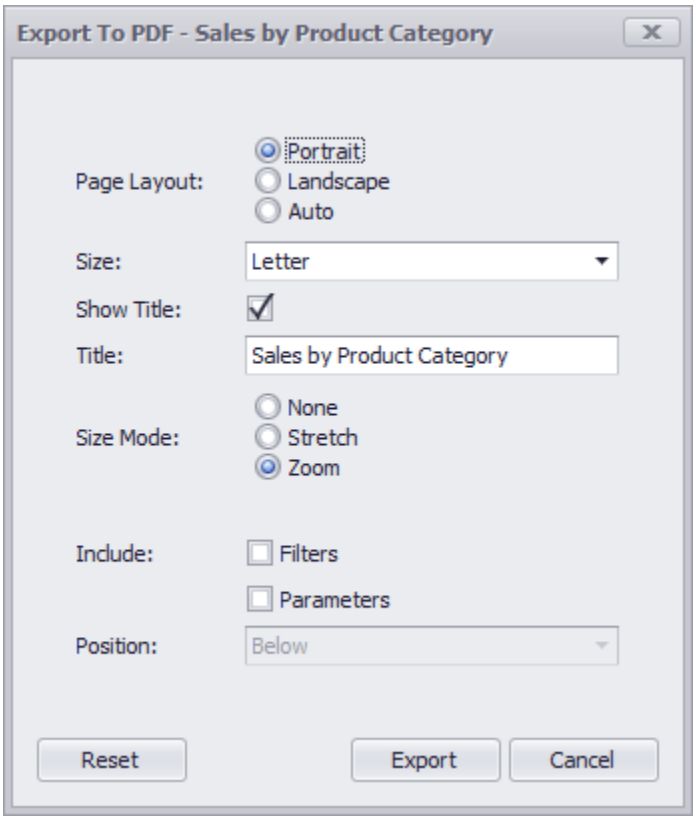
If you are printing the Range Filter dashboard item using the Print Preview, you can customize the following options (via the **Options** button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Size Mode** - Allows you to specify the print size mode for the Range Filter dashboard item.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

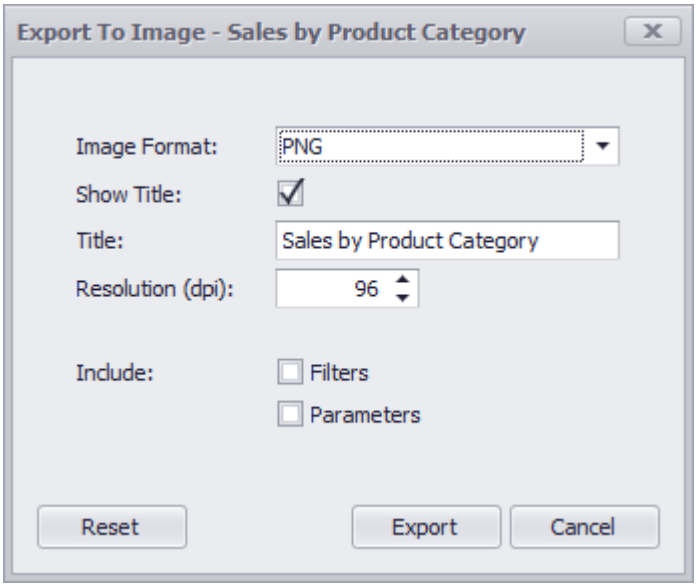


- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the Range Filter caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Size Mode** - Specifies the export size mode for the Range Filter dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Range Filter dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:

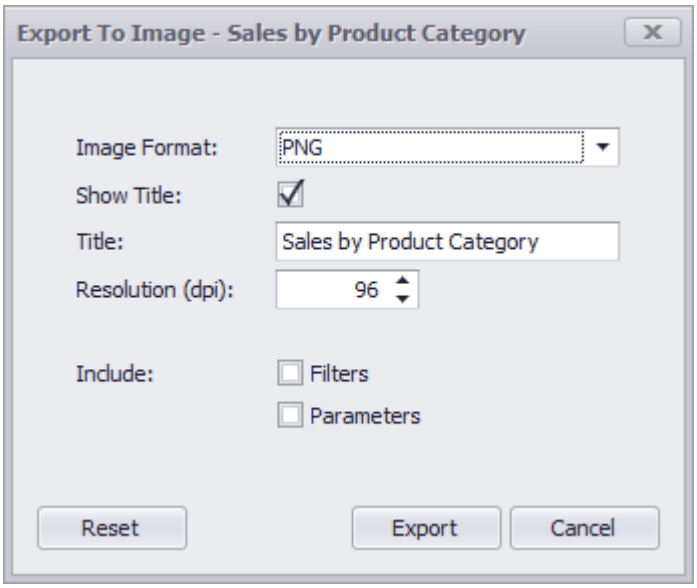


- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:



- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Image

The **Image** dashboard item is used to display images within a dashboard.

See Also

Printing and Exporting

Printing and Exporting

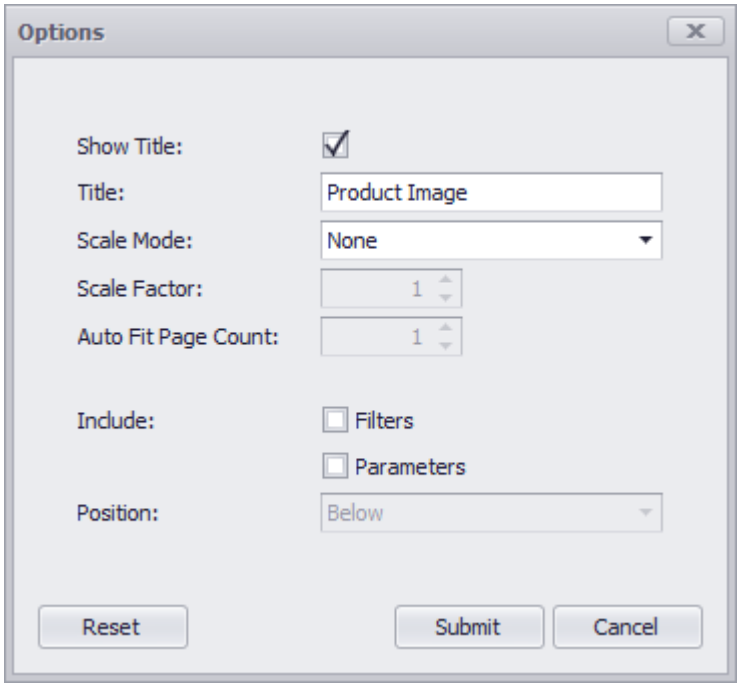
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing and exporting concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting an **Image** dashboard item.

- Printing
- Export
  To PDF
- Export To Image

Printing

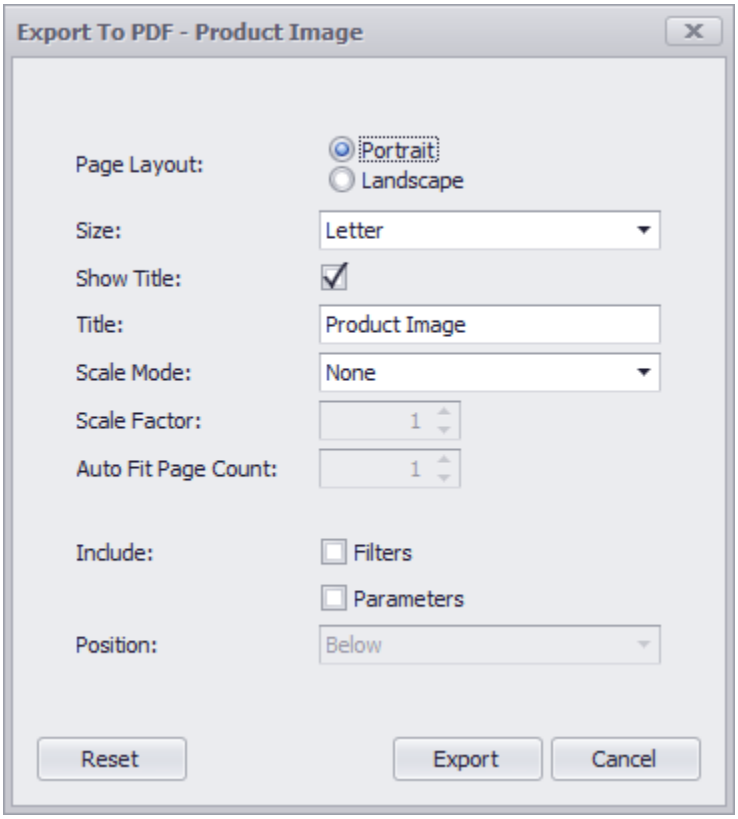
If you are printing the Image dashboard item using the Print Preview, you can customize the following options (via the Options button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Scale Mode** - Specifies the mode for scaling when printing an image.
- **Scale Factor** - Specifies the scale factor (in fractions of 1) by which an image is scaled.
- **Auto Fit Page Count** - Specifies the number of horizontal/vertical pages spanning the total width/height of an image.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

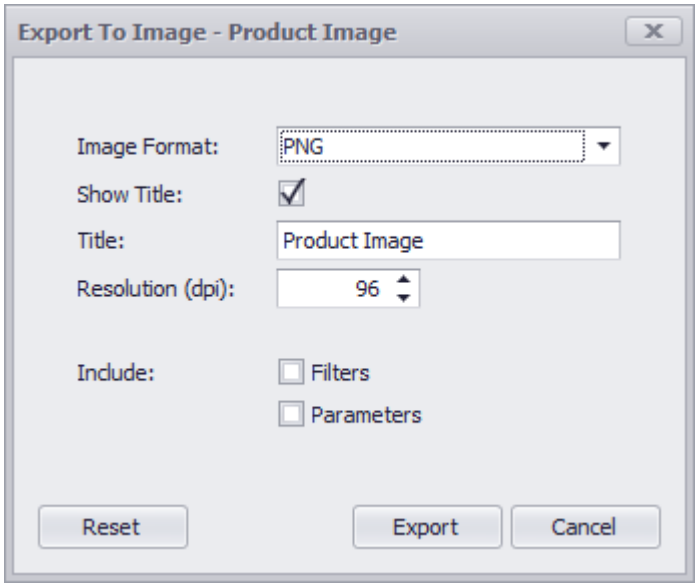
Export To PDF



- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the Image caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Scale Mode** - Specifies the mode for scaling when exporting a dashboard item.
- **Scale Factor** - Specifies the scale factor (in fractions of 1), by which a dashboard item is scaled.
- **Auto Fit Page Count** - Specifies the number of horizontal/vertical pages spanning the total width/height of a dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Image dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image



- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Show Title** - Specifies whether or not to apply the Image caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item. **Include | Filters** - Allows
- you to include master filter values to the exported document. **Include | Parameters** - Allows you to include
- parameter values to the exported document.

Specify the required options in this dialog and click the Export button to export the Image dashboard item. To reset changes to the default values, click the Reset button.

Text Box

The Text Box dashboard item is used to display rich text within a dashboard.

See Also

[Printing and Exporting]

Printing and Exporting

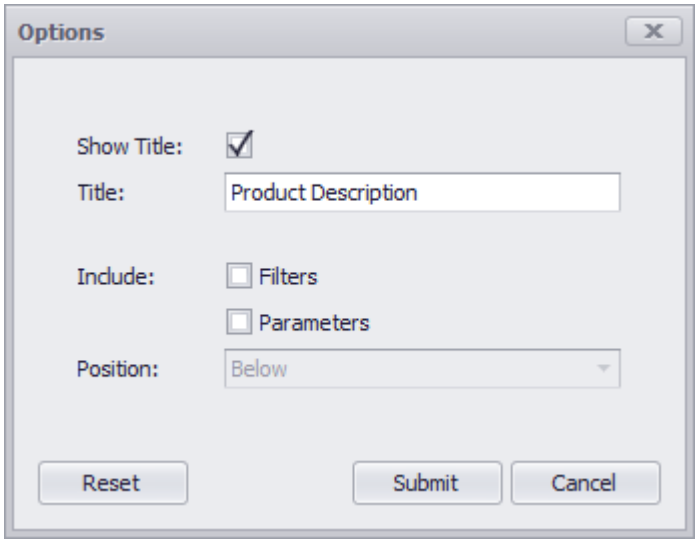
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing and exporting concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a Text Box dashboard item.

- Printing
- Export
  To PDF
- Export To Image

Printing

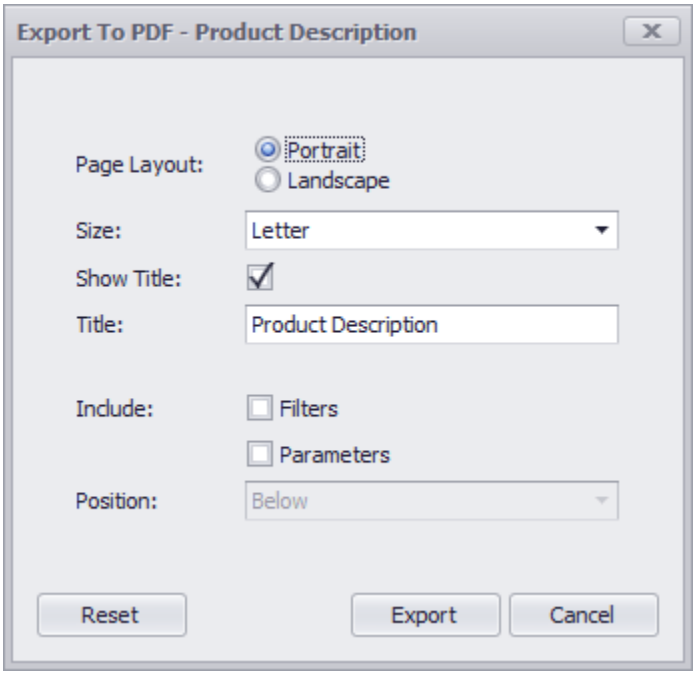
If you are printing a Text Box dashboard item using the Print Preview, you can customize the following options (via the Options button) before printing.



- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Include | Filters** - Allows you to include master filter values to the printed document.
- **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

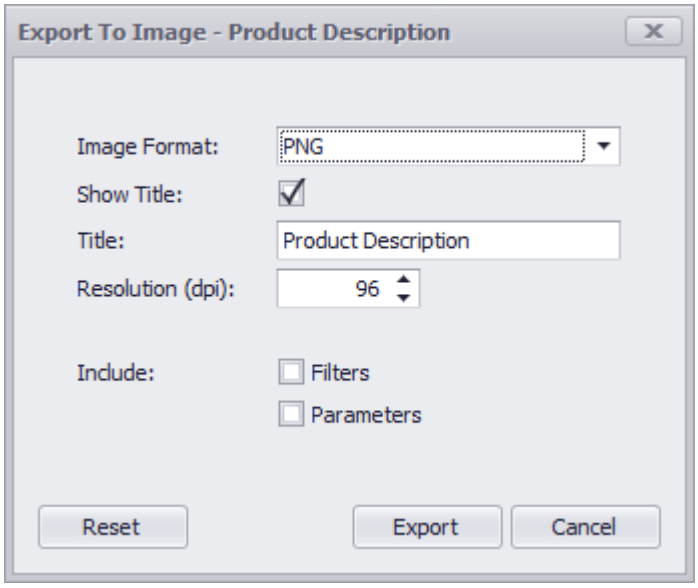
Export To PDF



- **Page Layout** - Specifies the page orientation used to export a dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the Text Box caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the Export button to export the Text Box dashboard item. To reset changes to the default values, click the Reset button.

Export To Image



- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Show Title** - Specifies whether or not to apply the Text Box caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item. **Include | Filters** - Allows
- you to include master filter values to the exported document. **Include | Parameters** - Allows you to include
- parameter values to the exported document.

Specify the required options in this dialog and click the **Export** button to export the Text Box dashboard item. To reset changes to the default values, click the **Reset** button.

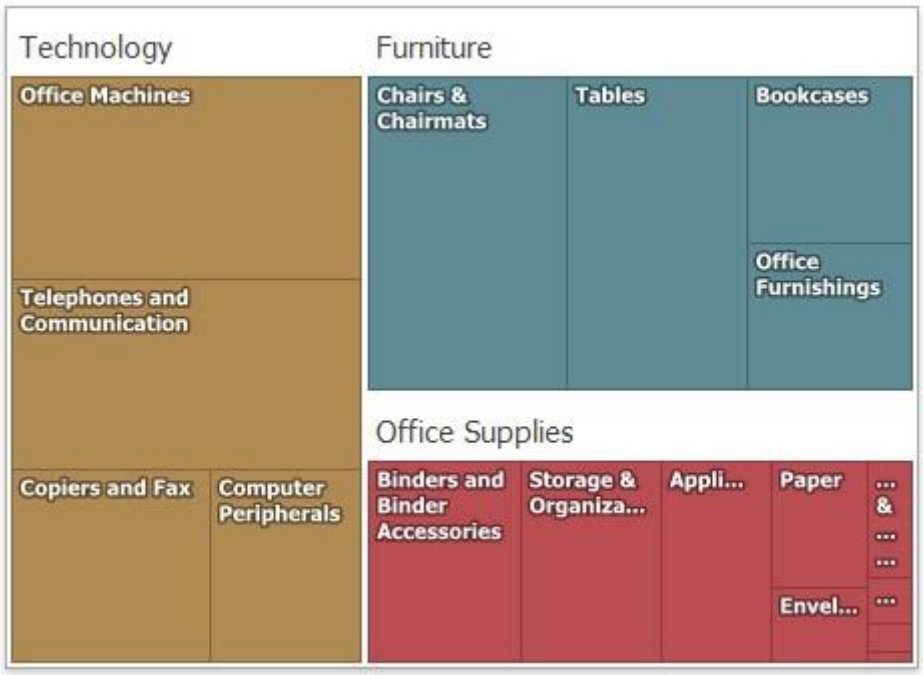
Treemap

The Treemap dashboard item visualizes data in nested rectangles that are called tiles.

- Data Presentation
- Basics Interactivity
- Printing and Exporting

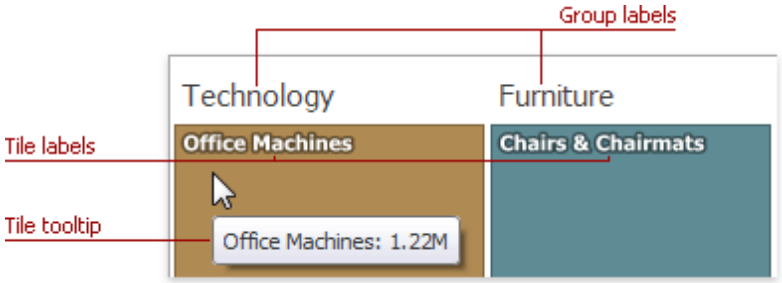
Data Presentation Basics

The Treemap dashboard item visualizes data in nested rectangles that are called tiles.



Labels and Tooltips

The Treemap displays labels that contain descriptions for tiles and groups, and provide tooltips with additional information.



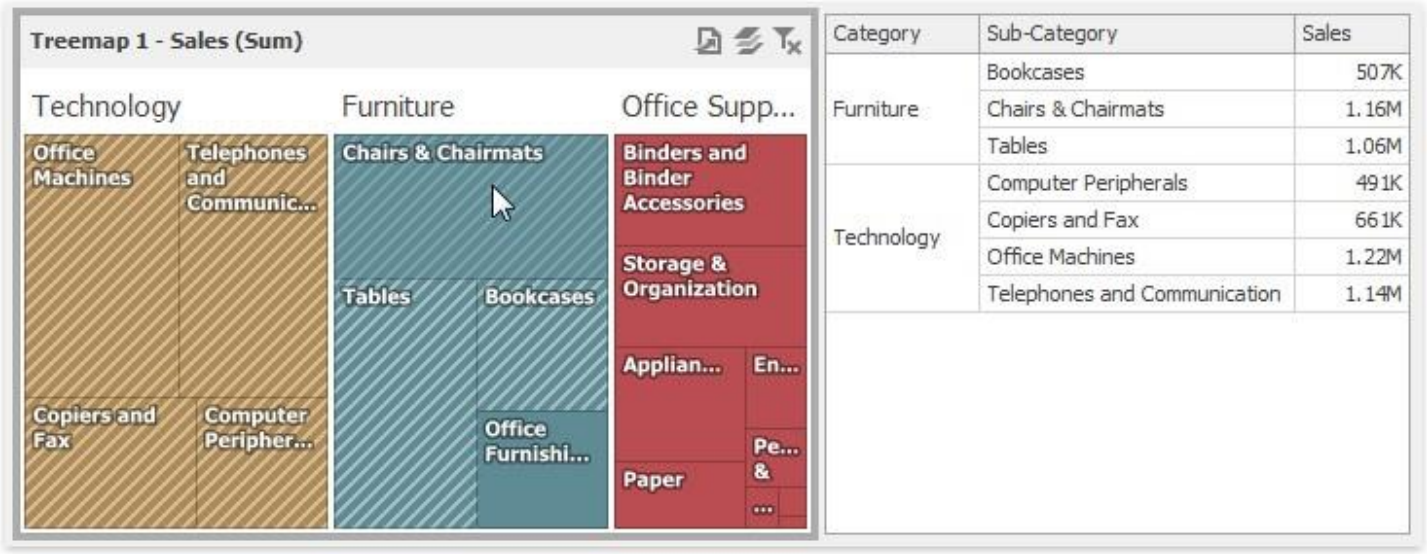
Interactivity

This topic describes features that enable interaction between the Treemap and other dashboard items. These features include Master Filtering and Drill-Down

Master Filtering

The Dashboard allows you to use any data aware dashboard item as a filter for other dashboard items (Master Filter). To learn more about filtering concepts common to all dashboard items, see the Master Filtering topic.

When Master Filtering is enabled, you can click a tile/group caption (or multiple tiles/group captions by holding down the CTRL key) to make other dashboard items only display data related to the selected tile(s).



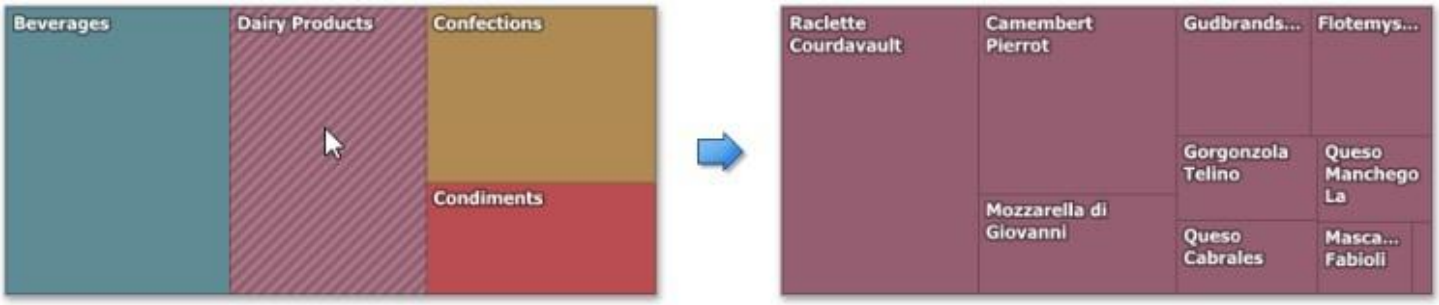
Category	Sub-Category	Sales
Furniture	Bookcases	507K
	Chairs & Chairmats	1.16M
	Tables	1.06M
Technology	Computer Peripherals	491K
	Copiers and Fax	661K
	Office Machines	1.22M
	Telephones and Communication	1.14M

To reset filtering, use the **Clear Master Filter** button (the icon) in the Treemap's caption area, or the **Clear Master Filter** command in the Treemap's context menu.

Drill-Down

The built-in drill-down capability allows you to change the detail level of data displayed in dashboard items on the fly. To learn more about drill-down concepts common to all dashboard items, see the Drill-Down topic.

When drill-down is enabled, you can click a tile to view its details.



Note

When Master Filtering is enabled, you can view the details by double-clicking a tile.

Printing and Exporting

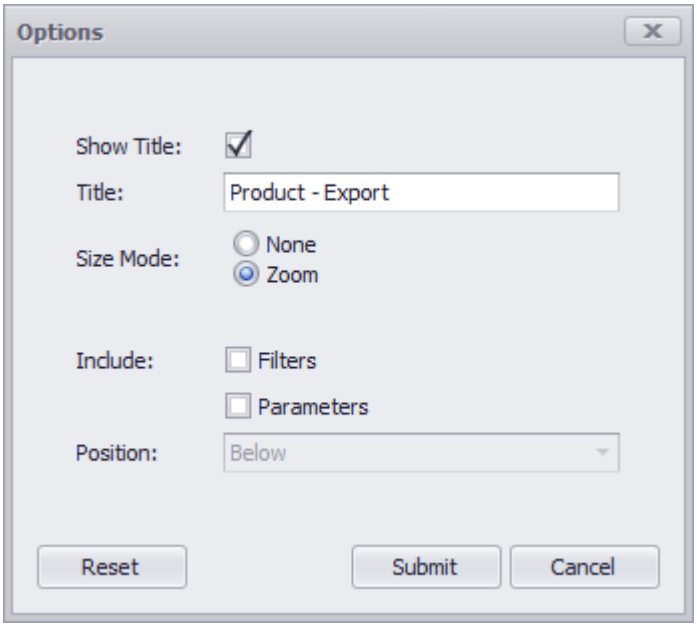
Dashboard allows you to print/export individual dashboard items, or the entire dashboard. To learn more about printing concepts common to all dashboard items, see the Printing and Exporting topic.

This topic describes the specifics of printing/exporting a Treemap dashboard item.

- Printing
- Export To PDF
- Export To Image
- Export To Excel

Printing

If you are printing the Treemap dashboard item using the Print Preview, you can customize the following options (via the Options button) before printing.

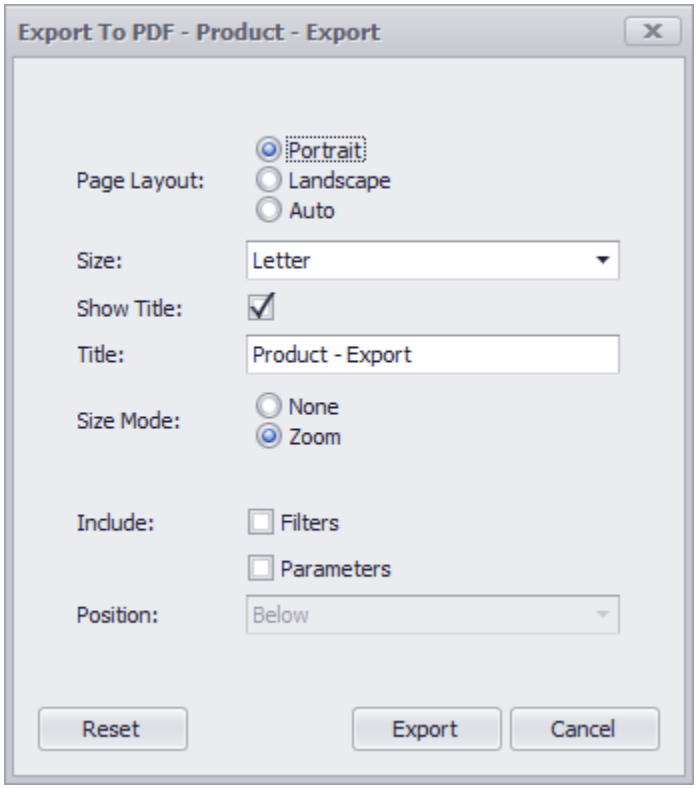


- **Show Title** - Specifies whether or not to apply the dashboard item caption to the printed document title.
- **Title** - Specifies the title of the printed document.
- **Size Mode** - Allows you to specify the print size mode for the Treemap dashboard
- item. **Include | Filters** - Allows you to include master filter values to the printed
- document. **Include | Parameters** - Allows you to include parameter values to the printed document.
- **Position** - Specifies the position of the master filter and parameter values in the printed document. You can select between Below and Separate Page.

Specify the required options in the **Options** dialog and click the **Submit** button to apply the changes. To reset changes to the default values, click the **Reset** button.

Export To PDF

The following options are available when exporting the Treemap dashboard item to a PDF.

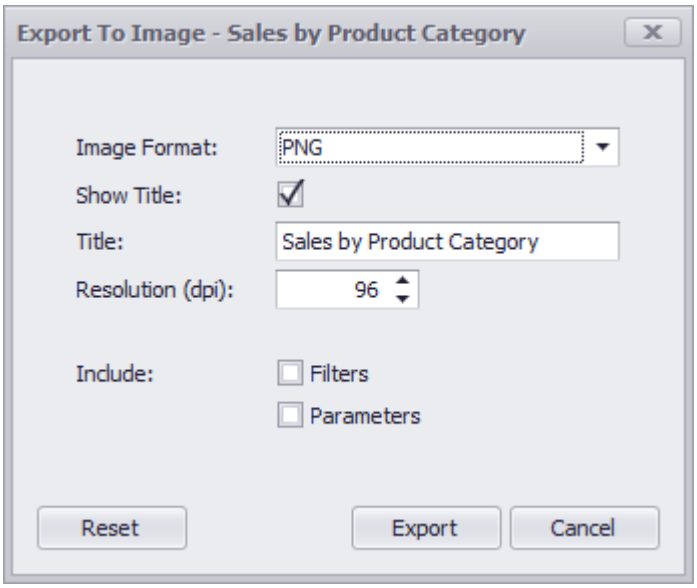


- **Page Layout** - Specifies the page orientation used to export a Treemap dashboard item.
- **Size** - Specifies the standard paper size.
- **Show Title** - Specifies whether or not to apply the dashboard item caption to the exported document title.
- **Title** - Specifies the title of the exported document.
- **Size Mode** - Specifies the export size mode for the Treemap dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the position of the master filter and parameter values in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the Treemap dashboard item. To reset changes to the default values, click the **Reset** button.

Export To Image

All data-bound dashboard items provide the same set of options when exporting them to an Image format. The following options are available:

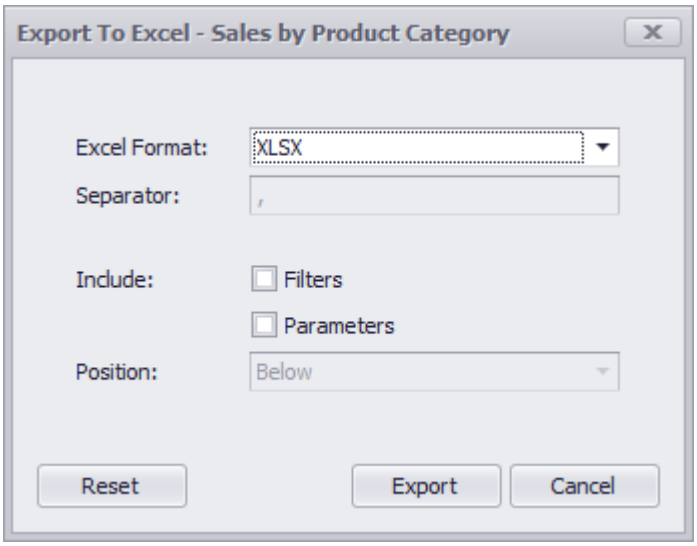


- **Show Title** - Specifies whether to apply the dashboard item caption to the exported document title.
- **Title** - Specifies of the exported document's title.
- **Image Format** - Specifies the image format in which the dashboard item is exported.
- **Resolution (dpi)** - Specifies the resolution (in dpi) used to export the dashboard item.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select between Below and Separate Page.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Export To Excel

Data visualized within all data-bound dashboard items can be exported to the required Excel format. The following options are available:



- **Excel Format** - Specifies the Excel format in which the dashboard item is exported. You can use the XLSX, XLS or CSV formats.
- **Separator** - Specifies the string used to separate values in the exported CSV document.
- **Include | Filters** - Allows you to include master filter values to the exported document.
- **Include | Parameters** - Allows you to include parameter values to the exported document.
- **Position** - Specifies the master filter and parameter values' position in the exported document. You can select from Below and Separate Sheet.

Specify the required options in this dialog and click the **Export** button to export the dashboard item. Click the **Reset** button to reset changes to the default values.

Filter Elements

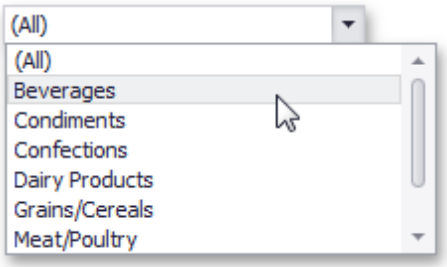
Filter elements provide the capability to filter other dashboard items.

- Combo
- Box List
- Box Tree
  View

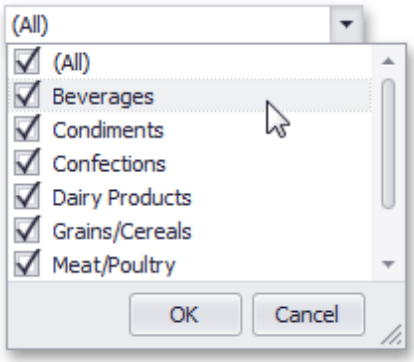
Combo Box

The **Combo Box** dashboard item allows you to select a value(s) from the drop-down list.

- The **Standard** type allows you to select only a single value.



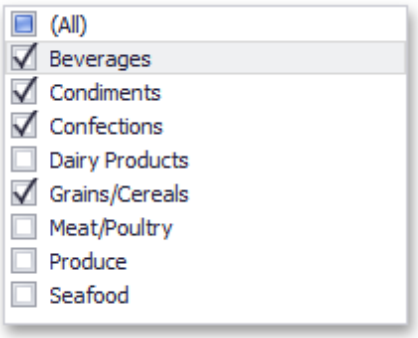
- The **Checked** type allows you to select multiple values in the invoked drop-down list.



List Box

The **List Box** dashboard item allows you to select a value(s) from the list.

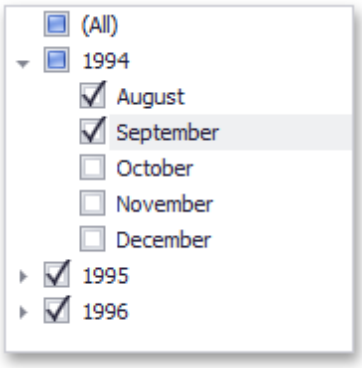
- The **Checked** type allows you to select multiple values in the list box.



The **Radio** type allows you to select only a single value in the radio group

Tree View

The **Tree View** dashboard item displays values in a hierarchical way and allows you to expand/collapse nodes.

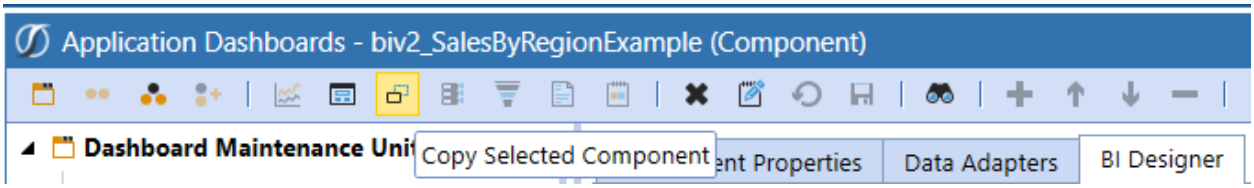


Copying Components

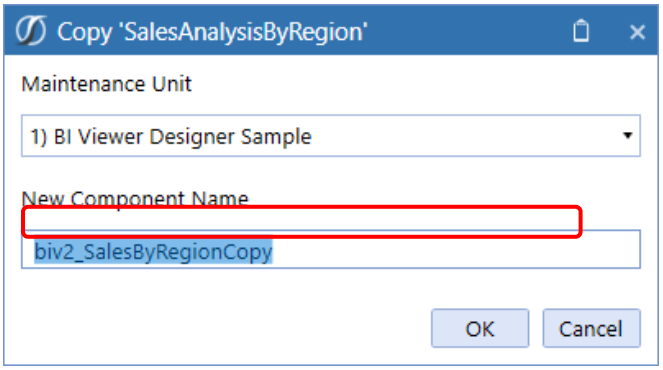
Use this to copy any selected dashboard component . This will create a copy of the selected dashboard component within the specified dashboard maintenance unit (DMU). If copying the component outside of the original dashboard maintenance unit (DMU), the data adapter references will no longer be valid. This can be resolved by remaking the data adapter in the newly copied component's dashboard maintenance unit and reattaching the data adapter accordingly.

Copy Select Component: BI Viewer

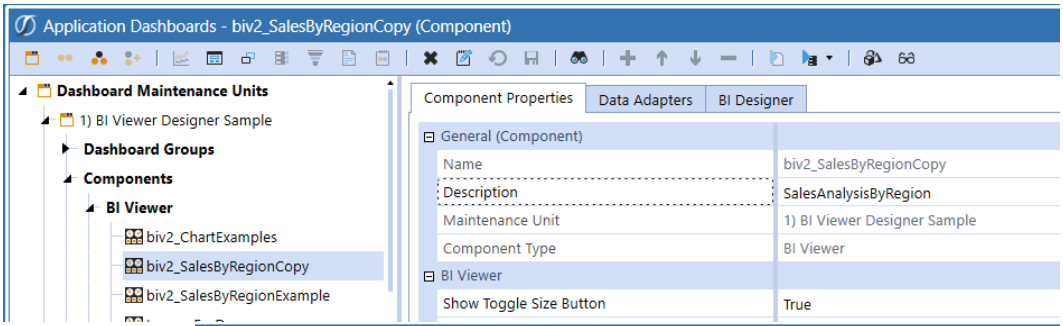
Copying the BI Viewer within the same dashboard maintenance unit will create a copy of the selected dashboard component within the specified dashboard maintenance unit (DMU) including any data adapters.

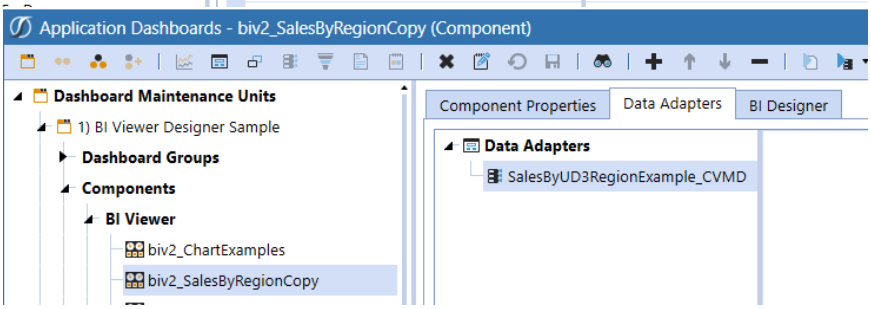


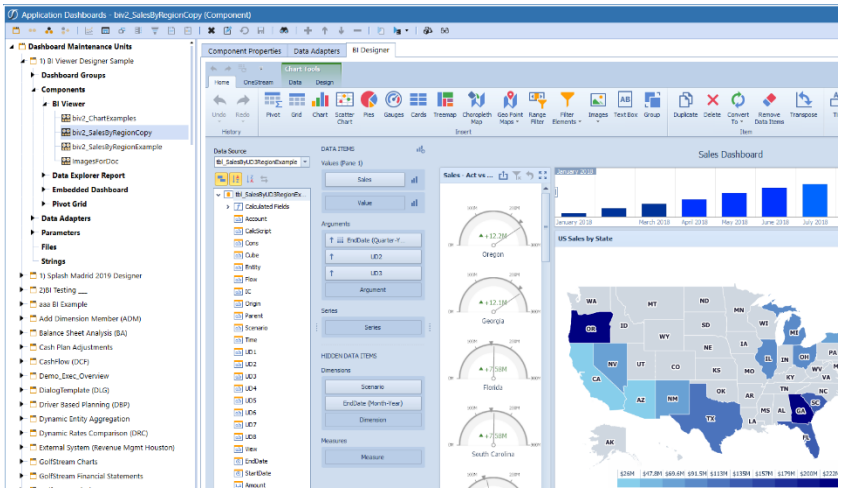
This will prompt the user for the **Maintenance Unit** location (same in this case) and a **New Component Name** which has been provided below (biv2_SalesByRegionCopy) which is a different name (required) than the original of "biv2_SalesByRegion".



An exact replica is now available with data adapters included

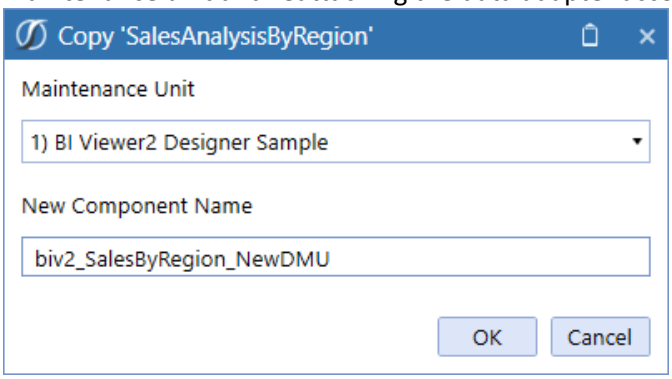

Application Dashboards - biv2_SalesByRegionCopy (Component)
Dashboard Maintenance Units
1) BI Viewer Designer Sample
Dashboard Groups
Components
BI Viewer
biv2_ChartExamples
biv2_SalesByRegionCopy
biv2_SalesByRegionExample
Component Properties
Data Adapters
BI Designer
General (Component)
Name
biv2_SalesByRegionCopy
Description
SalesAnalysisByRegion
Maintenance Unit
1) BI Viewer Designer Sample
Component Type
BI Viewer
BI Viewer
Show Toggle Size Button
True


Application Dashboards - biv2_SalesByRegionCopy (Component)
Dashboard Maintenance Units
1) BI Viewer Designer Sample
Dashboard Groups
Components
BI Viewer
biv2_ChartExamples
biv2_SalesByRegionCopy
Component Properties
Data Adapters
BI Designer
Data Adapters
SalesByUD3RegionExample_CVMD

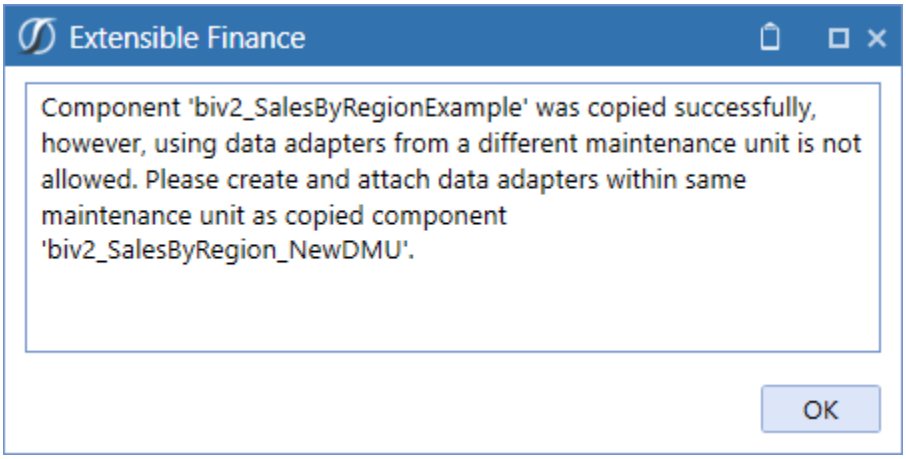


Copy Select Component (new DMU): BI Viewer

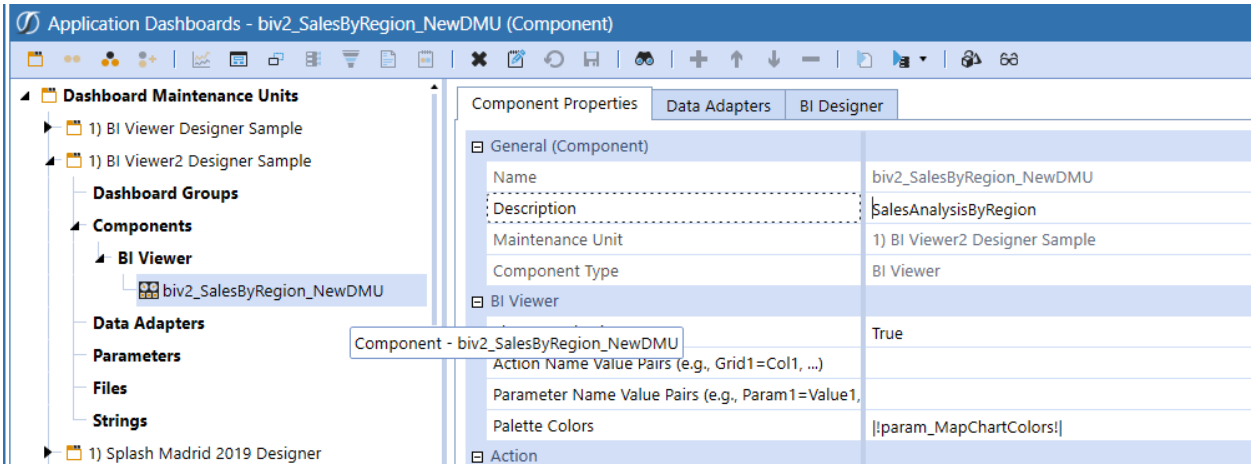
If copying the component outside of the original dashboard maintenance unit (DMU), the data adapter references will no longer be valid. This can be resolved by remaking the data adapter in the newly copied component's dashboard maintenance unit and reattaching the data adapter accordingly.



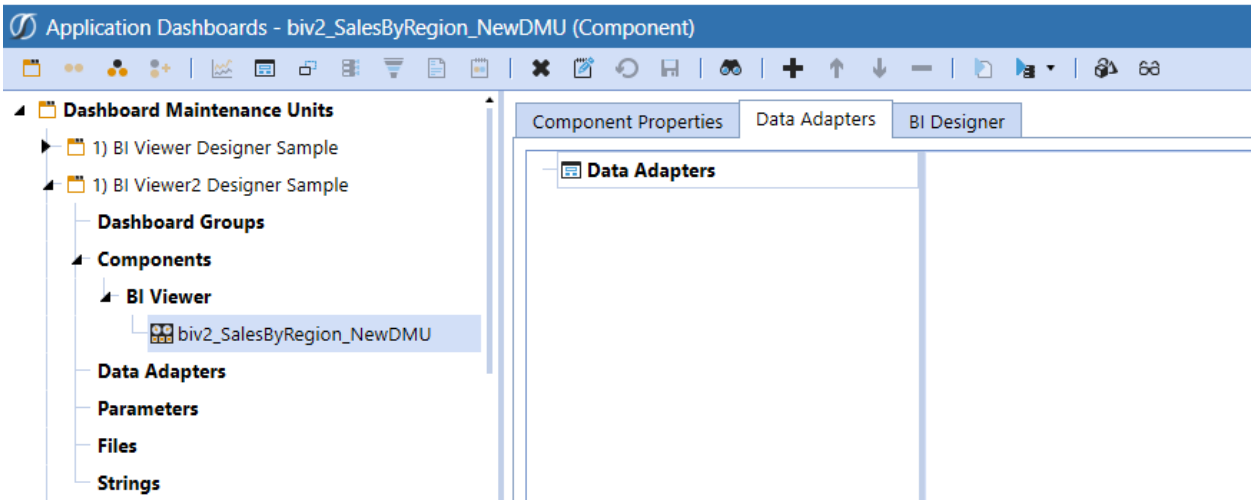
Prior to completing the copy component function, the user will receive the following message……



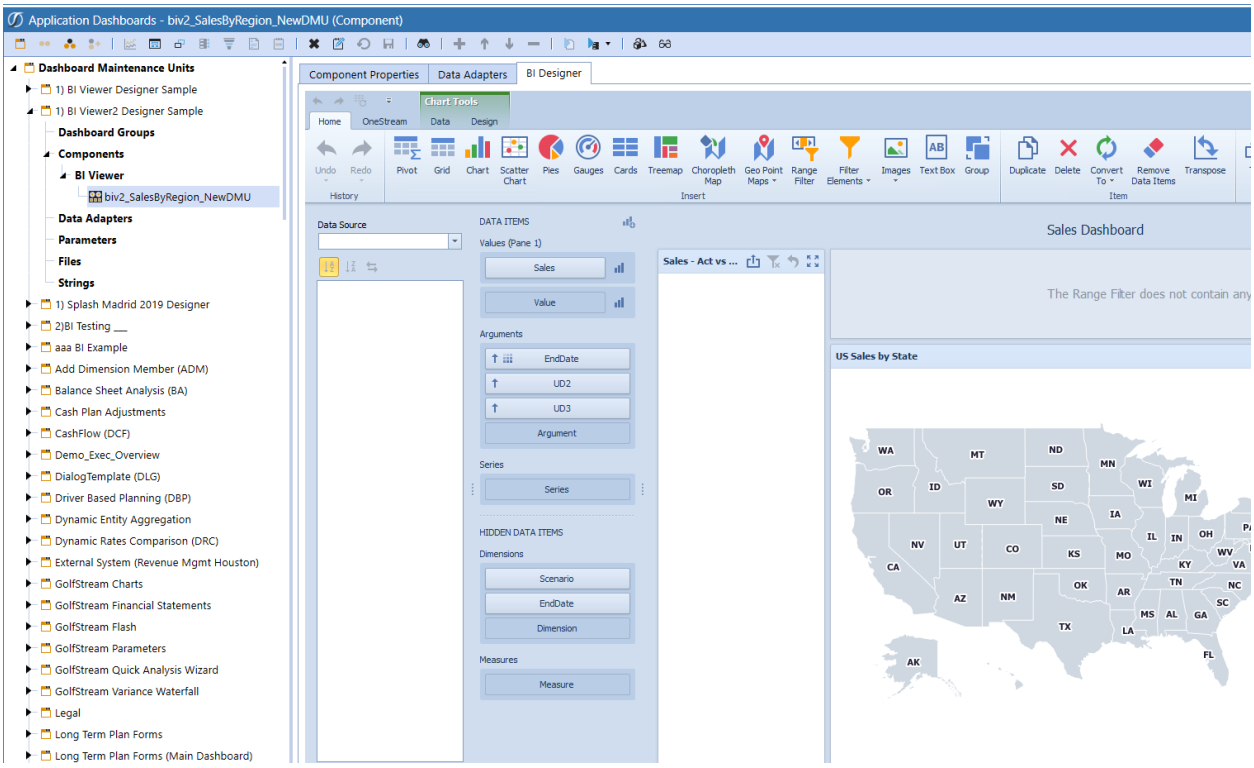
The Component was copied successfully as we see below…..



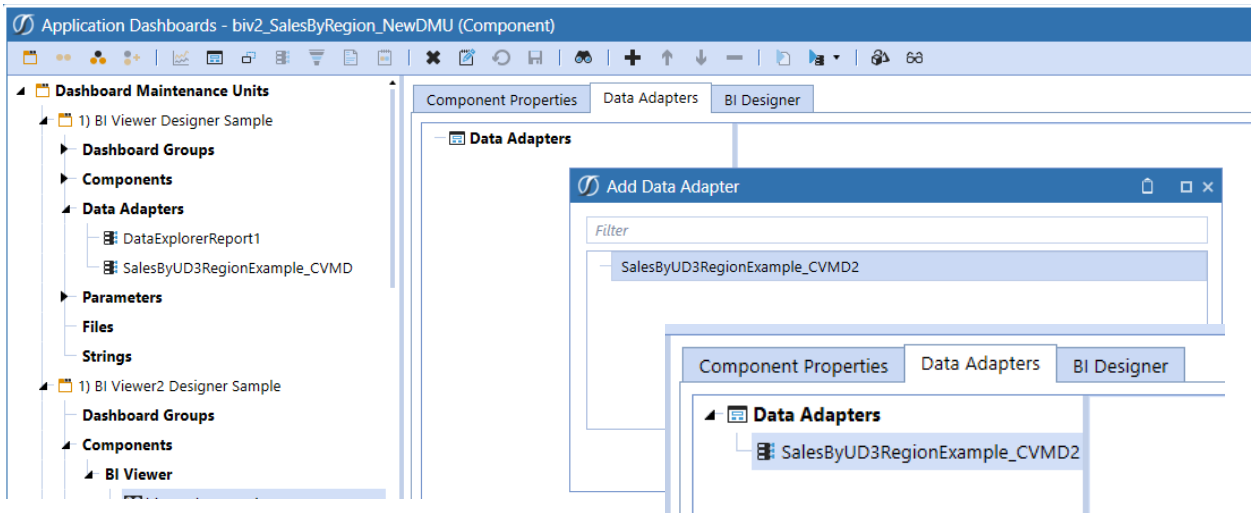
However, using data adapters from a different maintenance unit is not allowed and therefore no data adapter has been established at this point with the newly created copy of the component.



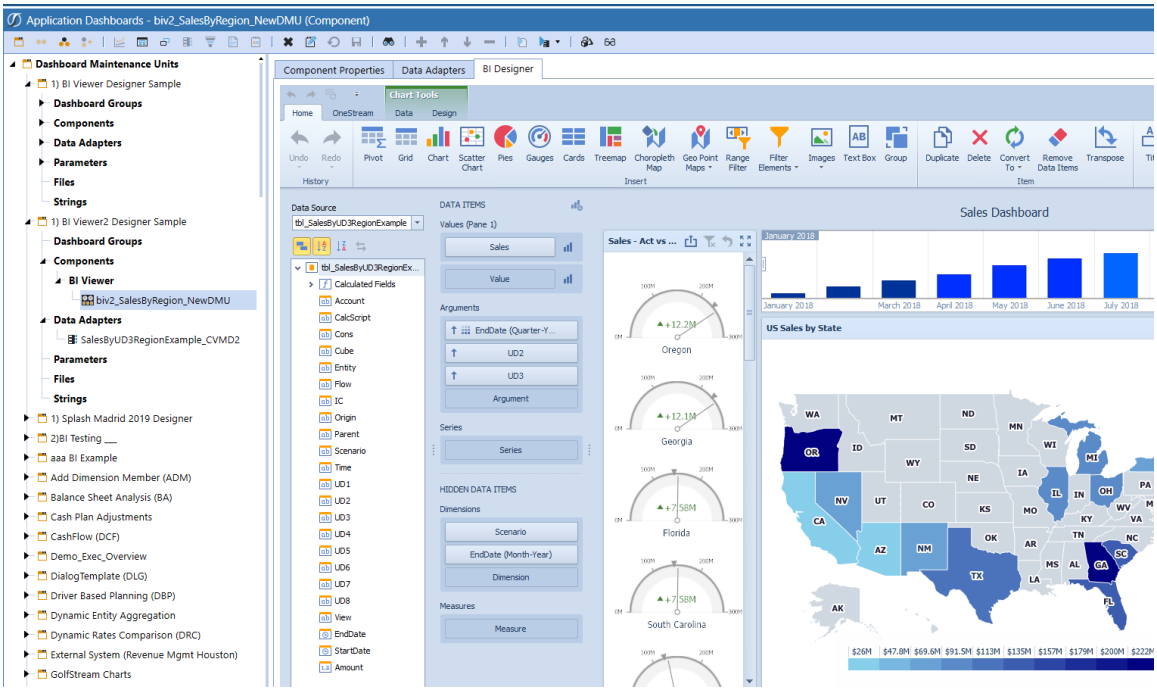
The dashboard exists with all its components but no referenced table at this time….



Once the Data Adapter is recreated in the in the newly copied component's dashboard maintenance unit, it can be attached to the BI Viewer.



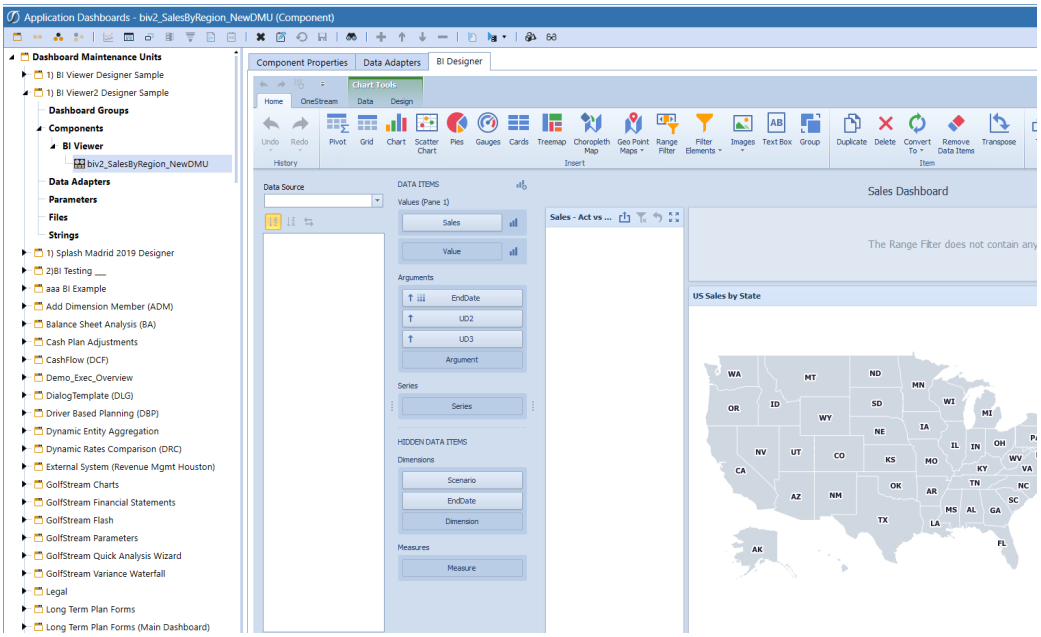
Once attached, the user can open the BI Designer tab view the results of the dashboard.


Application Dashboards - biv2_SalesByRegion_NewDMU (Component)
Dashboard Maintenance Units
1) BI Viewer Designer Sample
Dashboard Groups
Components
Data Adapters
Parameters
Files
Strings
1) BI Viewer2 Designer Sample
Dashboard Groups
Components
BI Viewer
biv2_SalesByRegion_NewDMU
Data Adapters
SalesByUD3RegionExample_CVMD2
Parameters
Files
Strings
1) Splash Madrid 2019 Designer
2)BI Testing ___
aaa BI Example
Add Dimension Member (ADM)
Balance Sheet Analysis (BA)
Cash Plan Adjustments
CashFlow (DCF)
Demo_Exec_Overview
DialogTemplate (DLG)
Driver Based Planning (DBP)
Dynamic Entity Aggregation
Dynamic Rates Comparison (DRC)
External System (Revenue Mgmt Houston)
GolfStream Charts
Component Properties
Data Adapters
BI Designer
Chart Tools
Home
OneStream
Data
Design
Undo
Redo
History
Pivot
Grid
Chart
Scatter Chart
Pies
Gauges
Cards
Treemap
Choropleth Map
Geo Point Maps
Range Filter
Filter Elements
Images
Text Box
Group
Insert
Duplicate
Delete
Convert To
Remove Data Items
Transpose
Item
Data Source
tbl_SalesByUD3RegionExample
Calculated Fields
Account
CalcScript
Cons
Cube
Entity
Flow
IC
Origin
Parent
Scenario
Time
UD1
UD2
UD3
UD4
UD5
UD6
UD7
UD8
View
EndDate
StartDate
Amount
DATA ITEMS
Values (Pane 1)
Sales
Value
Arguments
EndDate (Quarter-Y...
UD2
UD3
Argument
Series
Series
HIDDEN DATA ITEMS
Dimensions
Scenario
EndDate (Month-Year)
Dimension
Measures
Measure
Sales - Act vs ...
+12.2M
Oregon
+12.1M
Georgia
+7.58M
Florida
+7.58M
South Carolina
Sales Dashboard
January 2018
January 2018
March 2018
April 2018
May 2018
June 2018
July 2018
US Sales by State
WA
OR
CA
ID
NV
MT
WY
UT
AZ
CO
NM
ND
SD
NE
KS
OK
TX
MN
IA
MO
AR
LA
WI
IL
MS
MI
IN
KY
TN
AL
OH
WV
GA
NC
SC
VA
PA
FL
AK
$26M
$47.8M
$69.6M
$91.5M
$113M
$135M
$157M
$179M
$200M
$222M

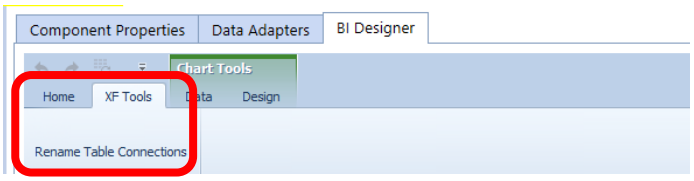
Rename Table Connections: XF Tools Tab (BI Designer)

This tab in the BI Designer is designed to Rename Table Connections in the event the Results Table Name from the Data Adapter changes names in the existing or new Dashboard Maintenance Unit. When a user changes the referenced results table name, the table connection can be reestablished by pointing the BI Designer to the correct table using this utility.

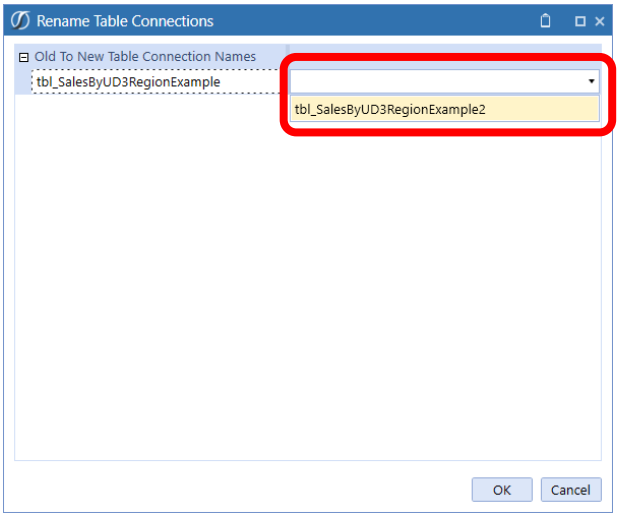
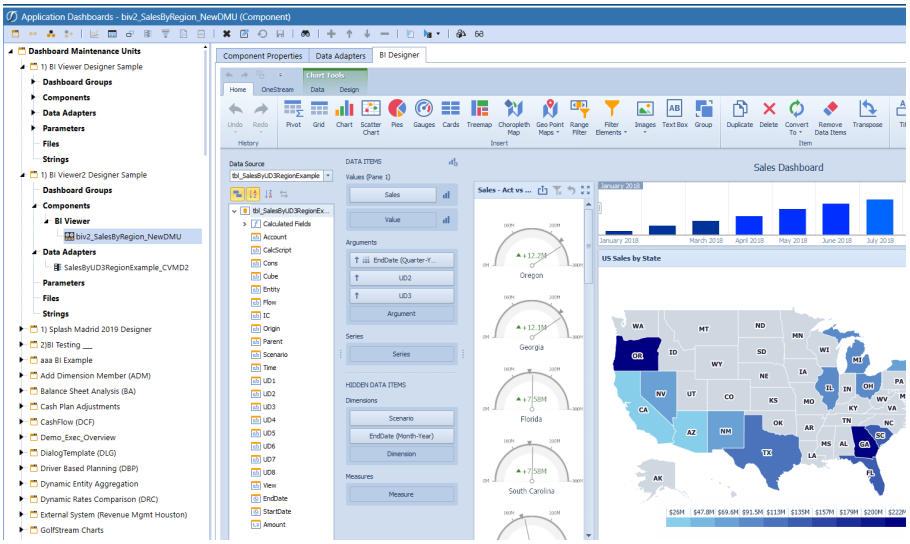
Existing BI Dashboard missing original table connection from data adapter. The dashboard items exist but without the supporting data….



BI Designer XF Tools menu to access the Rename Table Connections utility



Reestablish table connection using the utility



Existing BI Dashboard with reestablished table connection from data adapter using Rename Table Connections utility. Data returns and redraws the BI Dashboard.