

How to build Dashboard - Step by Step tutorial/recipe

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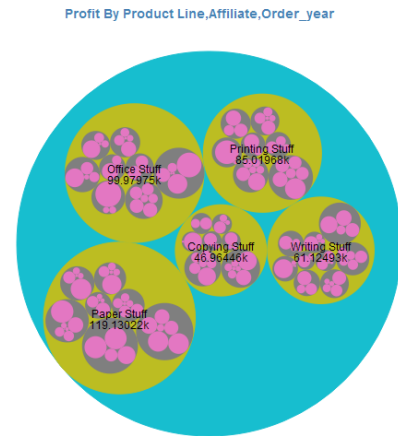
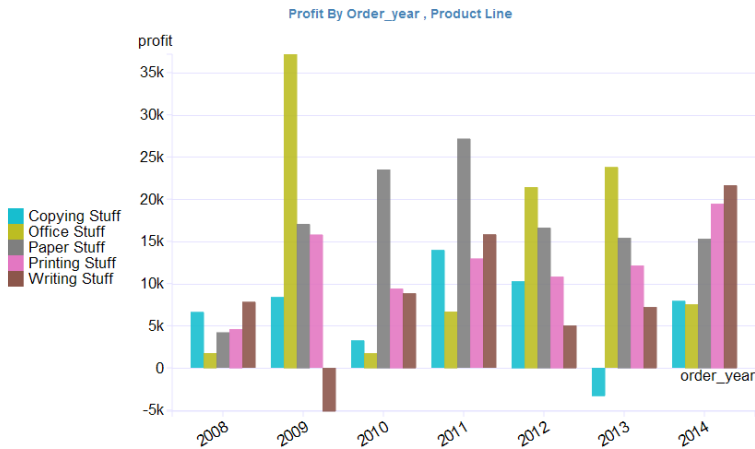
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How to create Excel Dashboard [as direct connection]

We will learn how to create web based Excel dashboards.

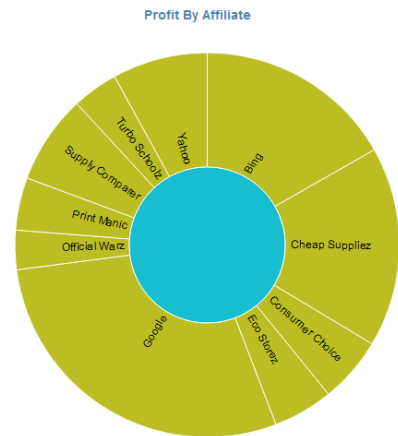
And this is the exact dashboard we are going to build

Ship Priority
 All Five Day One Day Three Day Two Day



Profit By Order_year, Customer Class, Product Line

Customer Class	Product Line	order_year	2008	2009	2010	2011	2012	2013	2014	Grand Total
Corporation	Copying Stuff	profit [sum]	-10027	3135	5184	15476	-1175	-768	17409	29235
	Office Stuff	profit [sum]	10835	23577	4124	872	16448	18271	21454	95582
	Paper Stuff	profit [sum]	16761	21627	18667	15047	7431	-1808	11005	88731
	Printing Stuff	profit [sum]	1869	24149	29054	3808	11952	9564	26411	106808
	Writing Stuff	profit [sum]	6774	5030	11333	21850	3230	7287	9517	65020
	Total: Corporation	profit [sum]	26213	77518	68362	57053	37886	32549	85796	385375
Family	Copying Stuff	profit [sum]	3276	2766	2112	1662	-1752	-7987	3306	3383
	Office Stuff	profit [sum]	1840	1464	14371	3198	13313	7394	1346	42926
	Paper Stuff	profit [sum]	6307	10613	21121	1397	-3691	10893	3293	49934
	Printing Stuff	profit [sum]	-7487	6203	6335	9942	1088	8522	4618	29218
	Writing Stuff	profit [sum]	-248	-392	-972	14694	3576	8369	-307	24720
Total: Family	profit [sum]	3688	20654	42967	30893	12534	27190	12256	150182	
Hospital	Copying Stuff	profit [sum]	4666	3411	-2498	8512	4000	7495	5365	30951
	Office Stuff	profit [sum]	789	25544	9036	-873	-13398	10189	-663	30624
	Paper Stuff	profit [sum]	-10522	1823	10659	10713	6852	15236	18844	53605
	Printing Stuff	profit [sum]	994	7836	6155	-1118	2418	14935	7569	38789
	Writing Stuff	profit [sum]	4799	9209	7256	7309	12741	9712	12674	63700
Total: Hospital	profit [sum]	725	47823	30608	24543	12613	57568	43789	217669	
School	Copying Stuff	profit [sum]	1944	499	1804	2594	4810	1841	3033	16525
	Office Stuff	profit [sum]	1220	1953	2474	4142	16312	6751	587	33438
	Paper Stuff	profit [sum]	611	4279	-107	1912	21447	2883	-84	30942
	Printing Stuff	profit [sum]	1305	1010	-4898	743	15348	714	-1102	13120
	Writing Stuff	profit [sum]	1191	-1138	962	923	-2701	244	-1194	-1714
Total: School	profit [sum]	6270	6603	235	10315	55216	12432	1240	92312	
Small Business	Copying Stuff	profit [sum]	2287	1568	5427	-2291	-3706	5554	13309	22148
	Office Stuff	profit [sum]	-1547	1424	12022	21082	3843	8563	8552	53939
	Paper Stuff	profit [sum]	9585	2768	6404	20698	5963	15488	16418	77324
	Printing Stuff	profit [sum]	8992	5506	9130	10907	10934	9042	-706	53804
	Writing Stuff	profit [sum]	8203	8539	15734	4079	5134	3527	2248	47463
Total: Small Business	profit [sum]	27519	19806	48716	54476	22168	42174	39820	254678	
Grand Total	profit [sum]	64416	172404	190888	177278	140418	171913	182900	1100217	



<http://www.infocaptor.com>

How to build Dashboards - How to create Excel dashboard

1. Prepare the excel file
2. Create a connection to Excel
3. Visualize the data and build analysis
4. Add analysis to the dashboards
5. Add parameters to the dashboard
6. Publish the Dashboard

1. Download the infocaptor_online_retail Data file you will need for your practice

http://infocaptor.s3.amazonaws.com/infocaptor_online_retailer.xlsx

2. Download and install InfoCaptor software

Here are the instructions and link to the zip download

http://infocaptor.com/help/install_dashboard_on_standalone_computer_or_laptop.htm

Purpose of this Dashboard tutorial

Complete guide on **building dashboards** using Excel, Access and any other Database as the data source.

The tutorial will start with instructions on building a dashboard using Excel Files.

The purpose is not just to build any dashboard but a good and useful dashboard that is modular in design and easy to maintain and scale it.

Excel Dashboards

Databases are often under lock-n-key of the IT Department and not possible to connect directly due to security reasons. So if you plan to build a Dashboard prototype or a Dashboard Mockup it makes sense to export the data to Excel and build it.

<http://www.infocaptor.com>

Modular Dashboard Design

Lot of the online tutorials and Dashboard e-books teach you to build dashboard in Excel file. They provide you with templates, you fill in the information and build the dashboard using Excel charting techniques.

If you use Excel Templates for your real dashboarding needs then you may end up with any of the below problems.

- Big Bulky and bloated excel files
- Undocumented Macros
- Zero verification on the data authenticity
- No way to refresh the dashboard (lost productivity)
-

Best Practice for Dashboard Design

Use Modular Design - Keep Data and Presentation Separate

How? – Use Excel only for storing your data. Nothing more. Do not build any visualization in the same place where your Data resides. In short, your excel files should contain only the data.

Benefits of this approach

- **Your dashboard or presentation layer is independent** – Dashboard definition is stored separately
- **Increased productivity** – When you have fresh data just refresh the dashboard, no redevelopment needed
- **No Messy Excel Macros or coding knowledge required** – Just drag and drop tables and visually build Tables, Charts, Speedometer, Gauges, Dials, Thermometers and more charts
- **Simplified Distribution and Presentation** – You can Export the Dashboard to PDF or HTML and just send them as attachments
- **Save Time** - Just build the dashboard presentation layer only once and automate the refreshes.
-

Data Preparation

There are certain rules to be followed when you get the data in Excel files. Here is a sample Excel file for the online retailer example.

The first row is always treated as the column names.

1	Ship Prior	Customer Category	Product Li	Warehous	Region lo	Census Di	State or P	ord_date
2	Five Day	Corporatic book shel	Office Stu	Central W	Midwest	East North	Illinois	8/28/2009
3	Five Day	Corporatic book shel	Office Stu	Central W	Midwest	East North	Ohio	3/15/2009
4	Five Day	Corporatic book shel	Office Stu	Central W	Midwest	West Nort	Minnesot	1/11/2010
5	Five Day	Corporatic book shel	Office Stu	Central W	Midwest	West Nort	South Dak	6/22/2014
6	Five Day	Corporatic book shel	Office Stu	North We	Midwest	East North	Illinois	8/5/2009
7	Five Day	Corporatic book shel	Office Stu	North We	Midwest	West Nort	Kansas	4/11/2012
8	Five Day	Corporatic book shel	Office Stu	South We	Midwest	West Nort	Missouri	2/25/2010
9	Five Day	Corporatic chair	Office Stu	Central W	Midwest	East North	Illinois	12/24/2010
10	Five Day	Corporatic chair	Office Stu	North We	Midwest	East North	Illinois	2/18/2008
11	Five Day	Corporatic desk	Office Stu	Central W	Midwest	East North	Illinois	6/14/2012
12	Five Day	Corporatic desk	Office Stu	Central W	Midwest	East North	Michigan	9/11/2012
13	Five Day	Corporatic desk	Office Stu	South We	Midwest	West Nort	Minnesot	4/26/2010
14	Five Day	Corporatic desk	Office Stu	South We	Midwest	West Nort	Missouri	5/18/2013
15	Five Day	Corporatic file holde	Paper Stu	Central W	Midwest	East North	Michigan	1/1/2011
16	Five Day	Corporatic file holde	Paper Stu	North East	Midwest	West Nort	Minnesot	4/25/2009
17	Five Day	Corporatic file holde	Paper Stu	South We	Midwest	East North	Illinois	3/20/2012

First row is always the column names. If you don't have then make sure to add column names as the first row

Provide a name to the worksheet. Avoid white space or blank characters in the worksheet name. Avoid numbers as the first letter and avoid special characters

In this tutorial we are going to connect directly to the Excel file as a database. There are alternative ways to work with Excel/CSV data and we will discuss them later.

Rules for the Excel File

1. It should be a simple table structure (no pivot tables : if your data is pivot like then you need to unpivot the data)
2. First row is the column names

3. The worksheet name should begin with a character and there should be no special characters

Benefits of connecting and using Excel file as database table

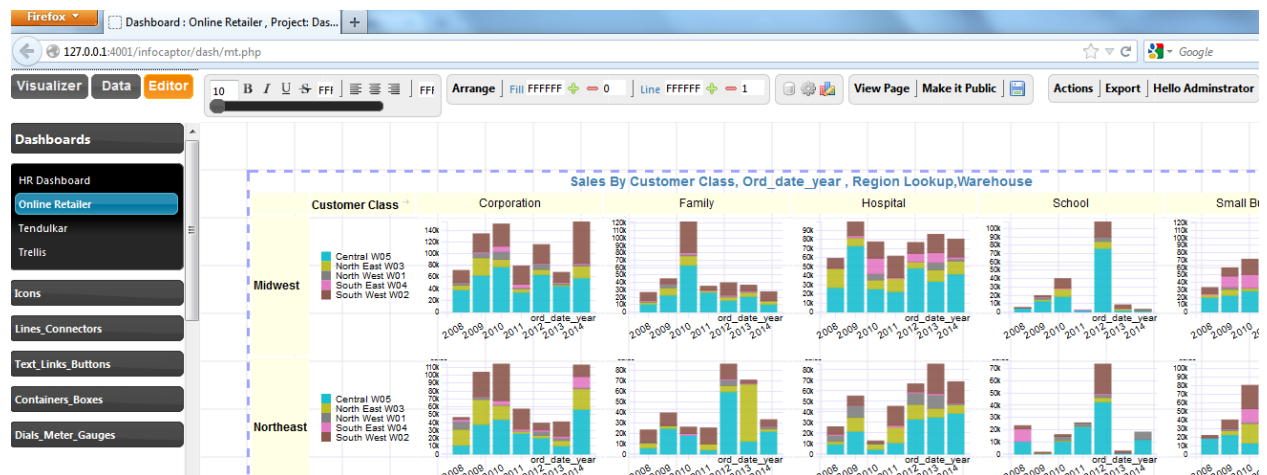
- We can put the dashboards on a central windows machine
- Everyone in your organization can login and view the dashboards using their browser
- You can simply replace a new updated version of Excel file and the dashboard will show the latest information without you needing to do anything.

Launch InfoCaptor Dashboard

Follow the steps listed in the below URL

http://infocaptor.com/help/install_dashboard_on_standalone_computer_or_laptop.htm

Once launched and running, you should see the browser open with the dashboard URL.

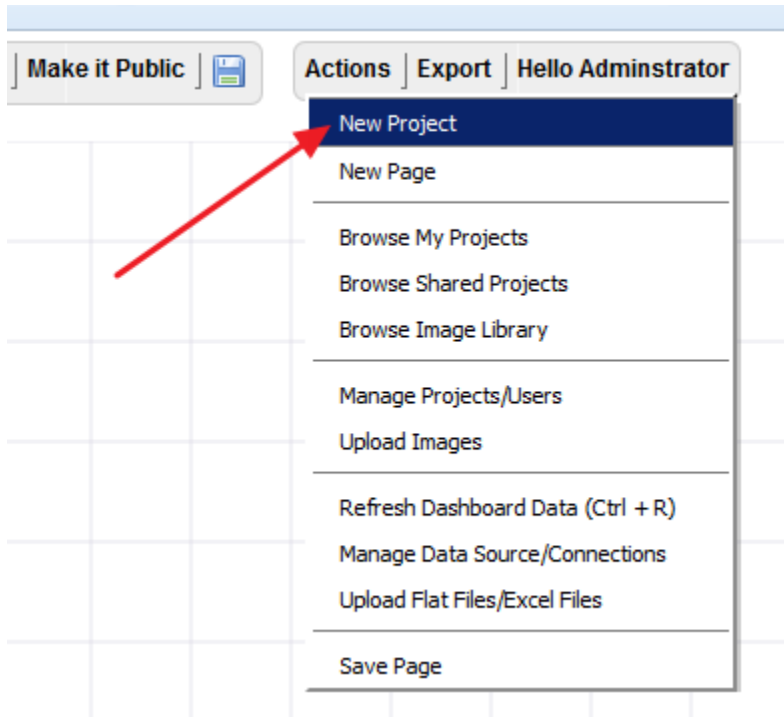


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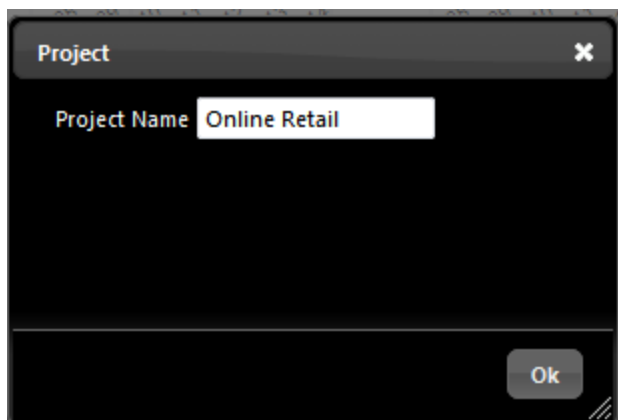
The software comes packaged with sample dashboards and that is what you see when you launch it.

Let us begin our dashboard building journey.

1. Go to the menu Actions and create new Project "Online Retail"



It will prompt you to give a name to your project

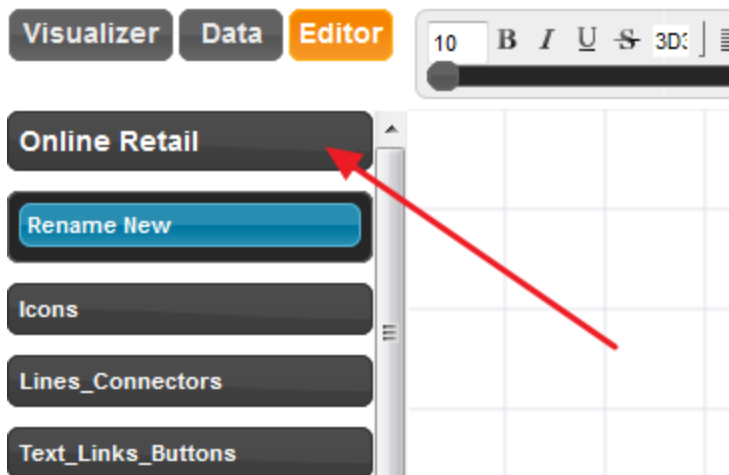


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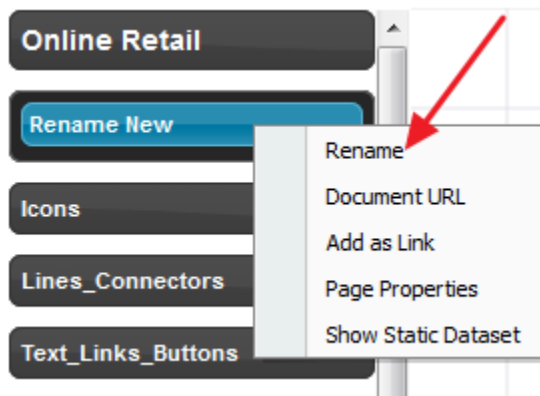
We will name it "Online Retail"

Click OK.

It will create a new project and add a new dashboard page that you can see on the left panel.

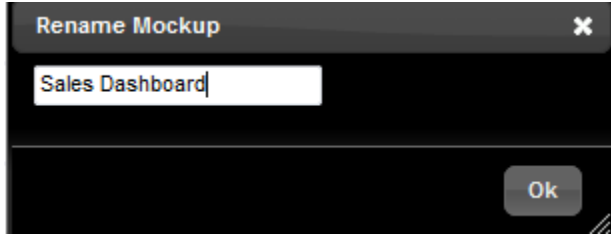


Right click on the "Rename New" and you will see the following options



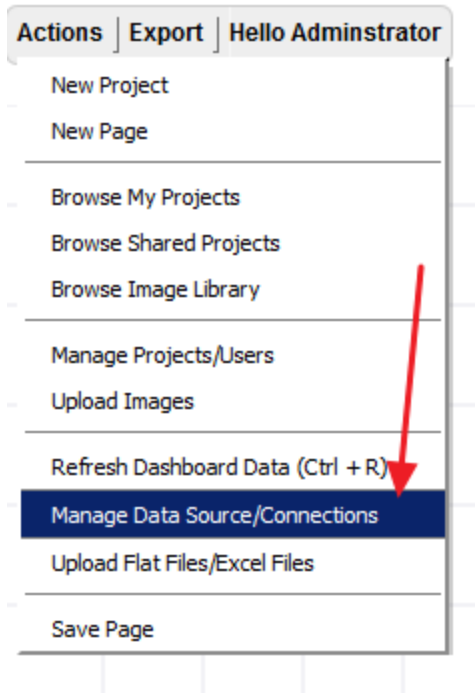
We will select 'Rename' and give a name "Sales Dashboard"

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Connect to the Excel File

Go to the Action menu and select "Manage Data Source/Connections"



It should open another page where you can define database and Excel connections

How to build Dashboards - How to create Excel dashboard

- [Google Analytics](#)
- [HTTP Post](#)

Native PHP Connections

- [Excel](#)
- [Access](#)
- [MySQL](#)

JDBC Connections

- [Oracle](#)
- [SQL Server](#)
- [MySQL](#)
- [PostgresSQL](#)
- [Pervasive](#)
- [Other JDBC](#)
- [ODBC](#)
- [Upload Flat Files/Excel Files](#)

All fields are required.

Excel File Connection

Connection Handle

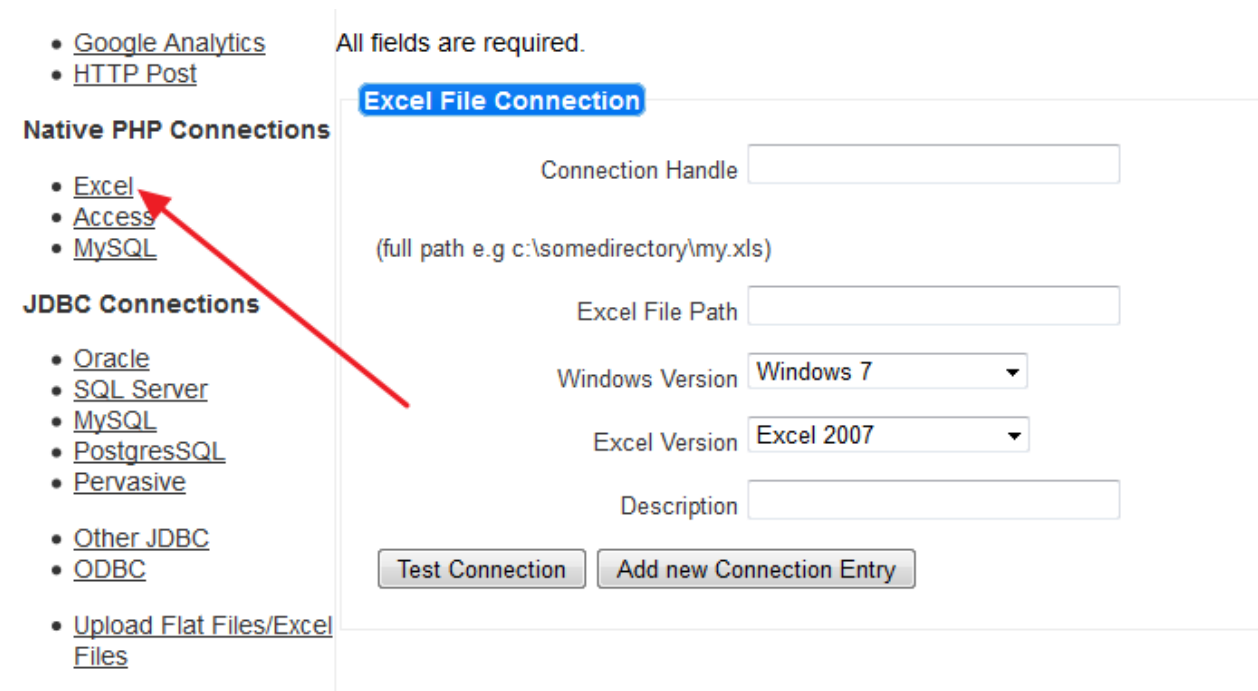
(full path e.g c:\somedirectory\my.xls)

Excel File Path

Windows Version

Excel Version

Description



Click on the Excel link and it will show you the fields to enter Excel file details.

Our excel file is located in the "c:\samples" directory

So we enter the full path to the Excel file as below

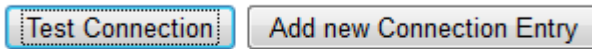
How to build Dashboards - How to create Excel dashboard

All fields are required.

Excel File Connection
Connection Handle
(full path e.g c:\somedirectory\my.xls)
Excel File Path
Windows Version
Excel Version
Description

We give a connection handle name so we can identify what this connection is about.

Click on the "Test Connection" button



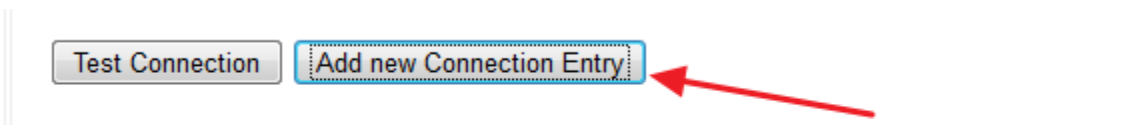
Excel File valid

Table List
infocaptor_online_retailer.xlsx

After clicking "Test Connection" it immediately tells us the file is valid. This is important if we misspelled the directory name or some filename.

Now click on "Add new Connection Entry" button

How to build Dashboards - How to create Excel dashboard



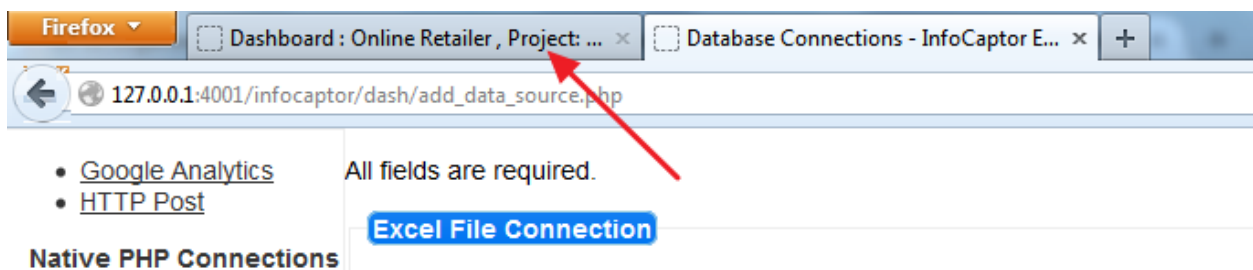
[infocaptor_online_retail] added successfully. You can use this handle in your queries

Excel File valid

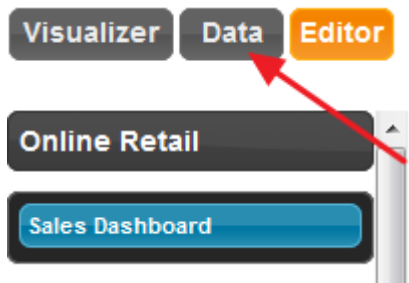
Table List

infocaptor_online_retailer.xlsx

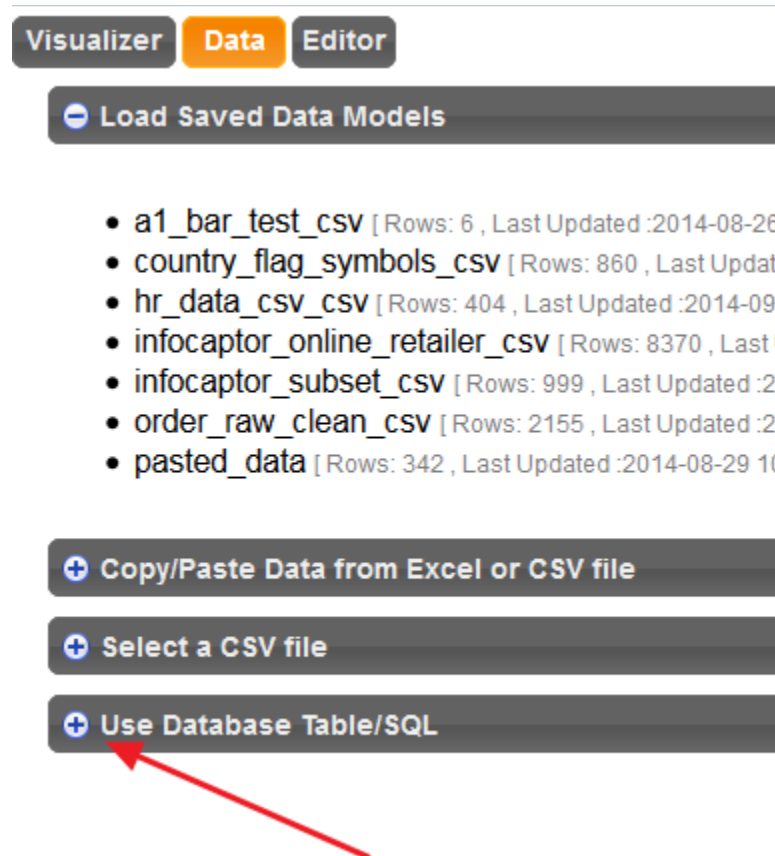
Now switch the browser tab to go back to the **Dashboard Editor**



On the top left you will 3 tabs



Click on the "Data" tab



Expand the "Use Database Table/SQL"


Fetch Database Connections

Click on the "Fetch Database Connections"

Use Database Table/SQL

Refresh Connection List [Create new](#)

- InfoCaptor Data Store
 - personalcloud
- Microsoft Access
 - adventure_works
 - boston_311_access
 - boston_mayor_311
 - northwind_accdb
 - norway_db
- Microsoft Excel
 - boston_excel_mayor_data
 - customer_data
 - h1bdata2
 - hr_employee_data
 - infocaptor_online_retail**
 - online_retail
 - period_amt_xlsx
 - product_data_excel
- jdbc
 - csv_file
 - idbc_mvsql



Click on our newest connection that we just created "infocaptor_online_retail"

- InfoCaptor Data Store
 - personalcloud
- Microsoft Access
 - adventure_works
 - boston_311_access
 - boston_mayor_311
 - northwind_accdb
 - norway_db
- Microsoft Excel
 - boston_excel_mayor_data
 - customer_data
 - h1bdata2
 - hr_employee_data
 - infocaptor_online_retail**
 - online_retail
 - period_amt_xlsx

Table listing for connection = infocaptor_online_retail



Click on the worksheet name "transactions"

How to build Dashboards - How to create Excel dashboard

Table listing for connection = infocaptor_online_retail

transactions

Analyze Data from selected Table

Sample Data from Table = [transactions\$]

Ship Priority Class	Customer Class	Category	Product Line	Warehouse	Region lookup	Census Division	State or Province	ord_date	affiliate	disco
Five Day	Corporation	book shelf	Office Stuff	Central W05	Midwest	North Central	Illinois	2009-08-28 00:00:00	Consumer Choice	0.14
Five Day	Corporation	book shelf	Office Stuff	Central W05	Midwest	North Central	Ohio	2009-03-15 00:00:00	Supply Comparer	0.06
Five Day	Corporation	book shelf	Office Stuff	Central W05	Midwest	North Central	Minnesota	2010-01-11 00:00:00	Bing	0.08
Five Day	Corporation	book shelf	Office Stuff	Central W05	Midwest	North Central	South Dakota	2014-06-22 00:00:00	Google	0.21
Five Day	Corporation	book shelf	Office Stuff	North West W01	Midwest	North Central	Illinois	2009-08-05 00:00:00	Cheap Suppliez	0.03
Five Day	Corporation	book shelf	Office Stuff	North West W01	Midwest	North Central	Kansas	2012-04-11 00:00:00	Google	0.18

On the right side, you will see a list of sample data.

Click on the "Analyze Data from selected Table"

This action will bring the data and switch the tab to "Visualizer"

How to build Dashboards - How to create Excel dashboard

Visualizer Data Editor

Background No Colc ▾

Data d3 color ▾

Reverse Colors

Change Properties

Visualize As

Normal Pivot ▾

+ Analysis Options

- Dimensions

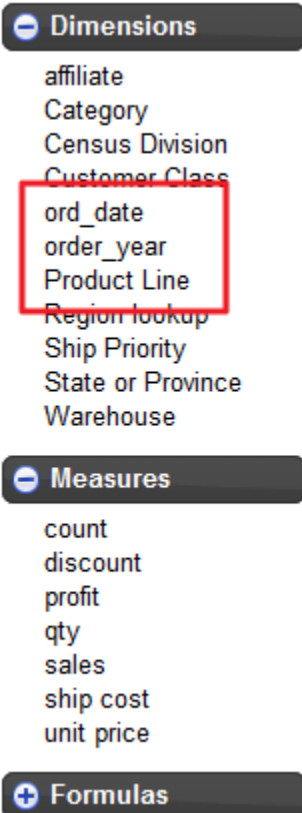
- Category
- Census Division
- Customer Class
- Product Line
- Region lookup
- Ship Priority
- State or Province
- Warehouse
- affiliate
- ord_date

- Measures

- count
- discount
- order_year
- profit
- qty
- sales
- ship cost
- unit price

+ Formulas

The Visualizer put the order_year column into measures bucket so we simply drag and bring it to the Dimensions bucket.



As you see, it has nicely separated the Dimensions and measures based on the column types. These are the column names from the first row of the excel file.

Build the first chart

In the Visualizer, drag the following fields

1. Drag "Product Line" to rows
2. Drag "order_year" to cols
3. Drag "Sales" to values

Once you finish dragging, the Visualizer keeps building the pivot as you finish dragging so it provides a nice visual feedback. Your final pivot should like below

How to build Dashboards - How to create Excel dashboard

Rows **Product Line** Cols **order_year** Values **sales [sum]**

Sales By Order_year , Product Line

order_year	2008	2009	2010	2011	2012	2013	2014
Copying Stuff	83709	158020	120507	215557	197066	142060	257408
Office Stuff	168762	292146	382266	362066	361252	318005	318314
Paper Stuff	252024	338045	471536	271505	335134	358146	402449
Printing Stuff	96489	285718	201063	215834	225887	206976	220195
Writing Stuff	130879	266150	217557	276961	269851	167191	210523

We will invoke the Visualizer Picker to change it to a bar chart.

Visualizer Data Editor Rows

Background Blue Grt

Data d3 color

Reverse Colors

Change Properties

Visualize As

Normal Pivot

Analysis Options

Row SubTotals

Column SubTotals

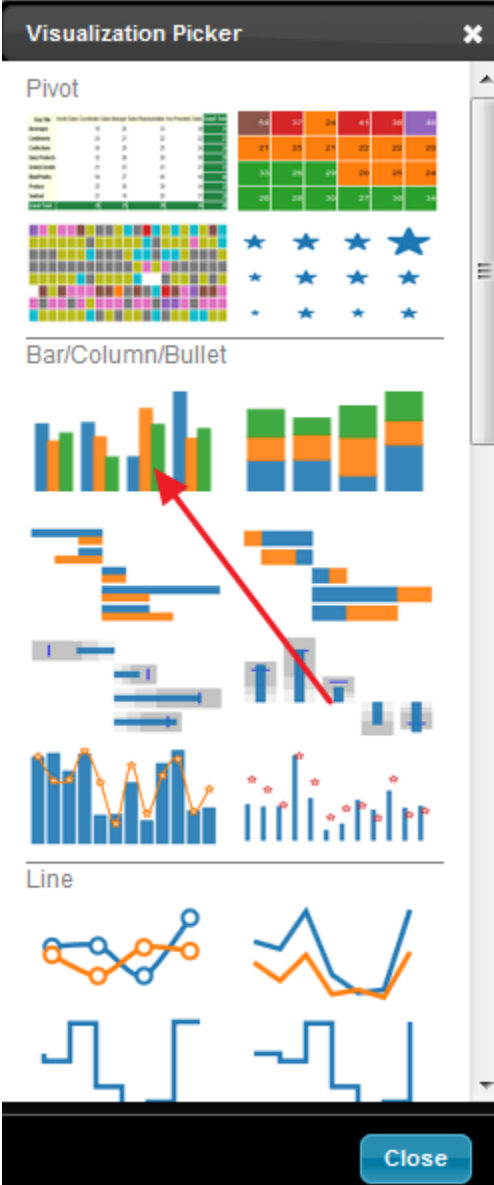
Row Grand Total

Column Grand Total

Filters

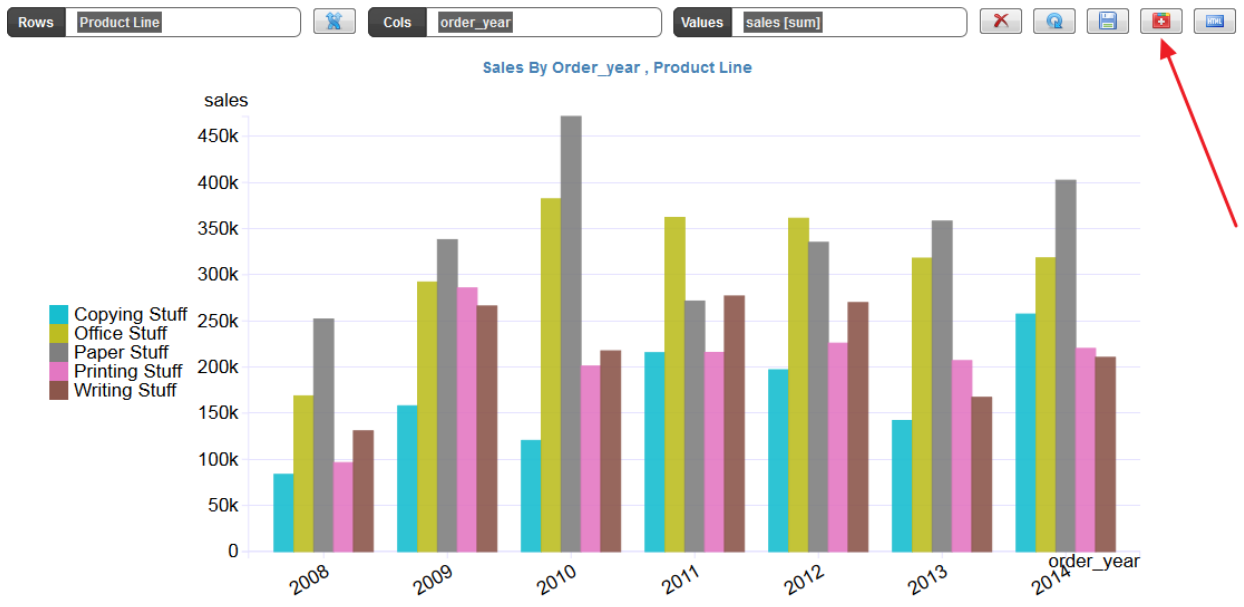
Click on the "Visualize As" region and it will open the following picker

How to build Dashboards - How to create Excel dashboard



Click on the "Grouped Vertical Bar chart"

How to build Dashboards - How to create Excel dashboard



You should now see the above chart

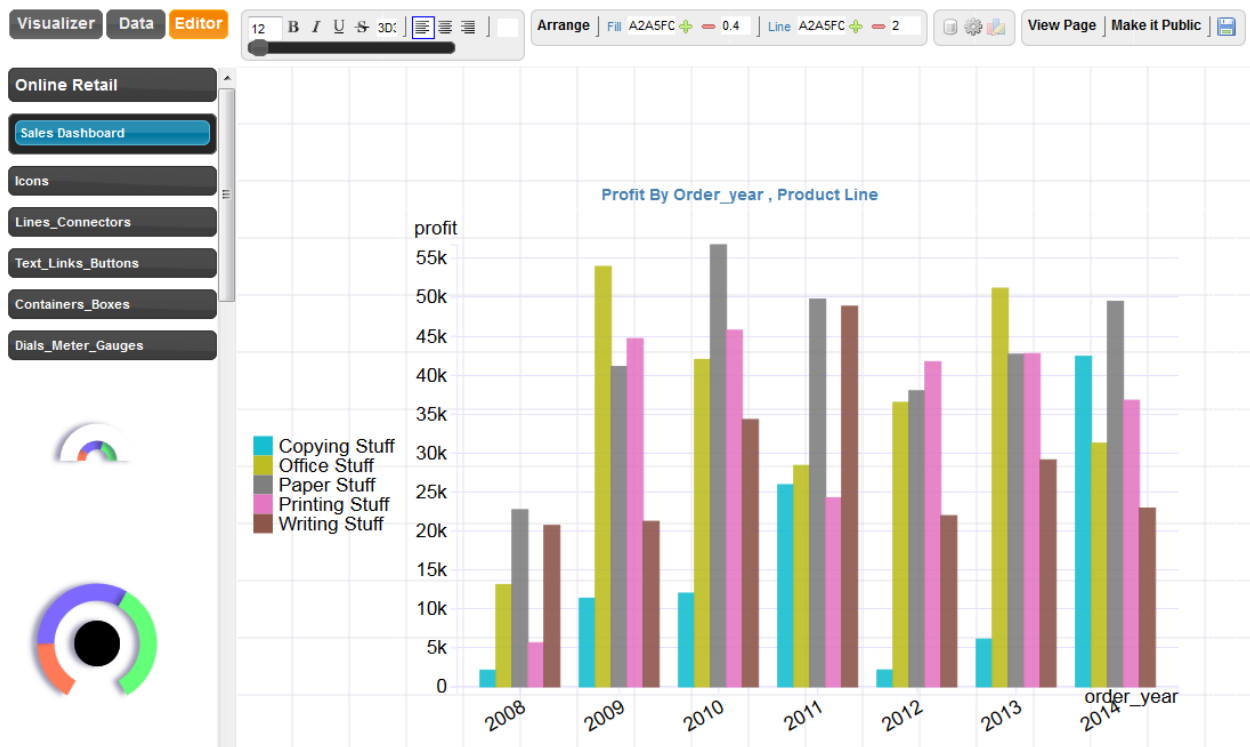
Add Chart to the dashboard

Click on the plus icon that says "Add to dashboard" when you hover on it.



Your first chart is now added to the dashboard. Since this is a direct connection to Excel file you don't need to save any data.

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Add Circle Pack hierarchical visualization to the Dashboard

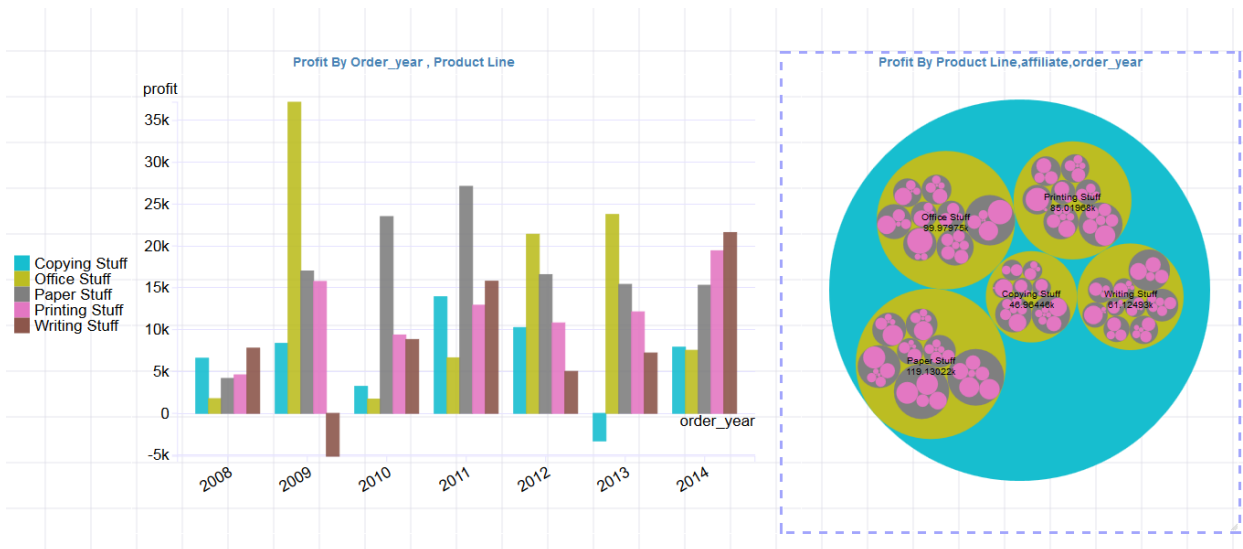
1. Switch back to the Visualizer
2. Add one more dimension "affiliates" to the Rows bucket
3. Select "Circle Pack" from the Visualizer drop down
4. Reverse the colors

How to build Dashboards - How to create Excel dashboard



Now click again on the "+" icon to add to the dashboard

Your dashboard should have now two widgets as below

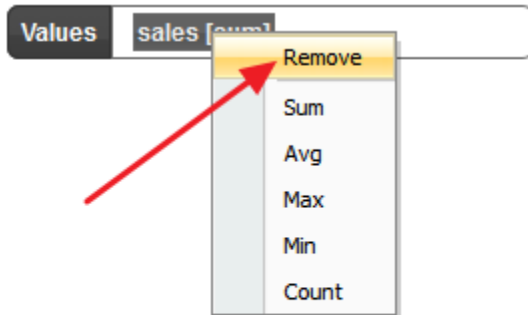


Add a pivot table to the dashboard

1. Switch to the Visualizer

How to build Dashboards - How to create Excel dashboard

2. Add "Customer Class" to the left of "Product Line"
3. Remove "Sales" and add "Profit"



- 4.

5.

Rows: Customer Class Product Line Cols: order_year Values: profit [sum]

Profit By Order_year , Customer Class,Product Line

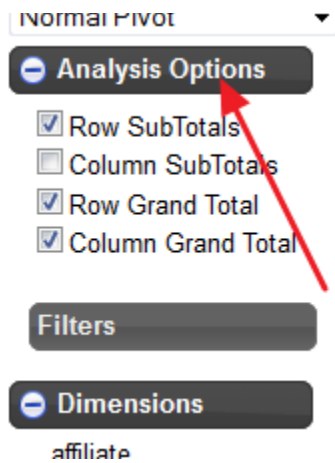
	order_year →	2008	2009	2010	2011	2012	2013	2014
Corporation	Copying Stuff	-10027	3135	5184	15476	-1175	-766	17409
	Office Stuff	10835	23577	4124	872	16448	18271	21454
	Paper Stuff	16761	21627	18667	15047	7431	-1806	11005
	Printing Stuff	1869	24149	29054	3808	11952	9564	26411
	Writing Stuff	6774	5030	11333	21850	3230	7287	9517
Family	Copying Stuff	3276	2766	2112	1662	-1752	-7987	3306
	Office Stuff	1840	1464	14371	3198	13313	7394	1346
	Paper Stuff	6307	10613	21121	1397	-3691	10893	3293
	Printing Stuff	-7487	6203	6335	9942	1088	8522	4618
	Writing Stuff	-248	-392	-972	14694	3576	8369	-307
Hospital	Copying Stuff	4666	3411	-2498	8512	4000	7495	5365
	Office Stuff	789	25544	9036	-873	-13398	10189	-663
	Paper Stuff	-10522	1823	10659	10713	6852	15236	18844
	Printing Stuff	994	7836	6155	-1118	2418	14935	7569
	Writing Stuff	4799	9209	7256	7309	12741	9712	12674
School	Copying Stuff	1944	499	1804	2594	4810	1841	3033
	Office Stuff	1220	1953	2474	4142	16312	6751	587
	Paper Stuff	611	4279	-107	1912	21447	2883	-84
	Printing Stuff	1305	1010	-4898	743	15348	714	-1102
	Writing Stuff	1191	-1138	962	923	-2701	244	-1194
Small Business	Copying Stuff	2287	1568	5427	-2291	-3706	5554	13309
	Office Stuff	-1547	1424	12022	21082	3843	8563	8552
	Paper Stuff	9585	2768	6404	20698	5963	15488	16418
	Printing Stuff	8992	5506	9130	10907	10934	9042	-706
	Writing Stuff	8203	8539	15734	4079	5134	3527	2248

Add Row sub-totals and Column Grand total

Expand the "Analysis Options" and then

1. Select Row subtotals
2. Select Row Grand total
3. Select Column Grand Total

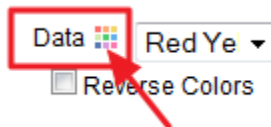
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4.

Change the color palette

1. Click on the color palette icon

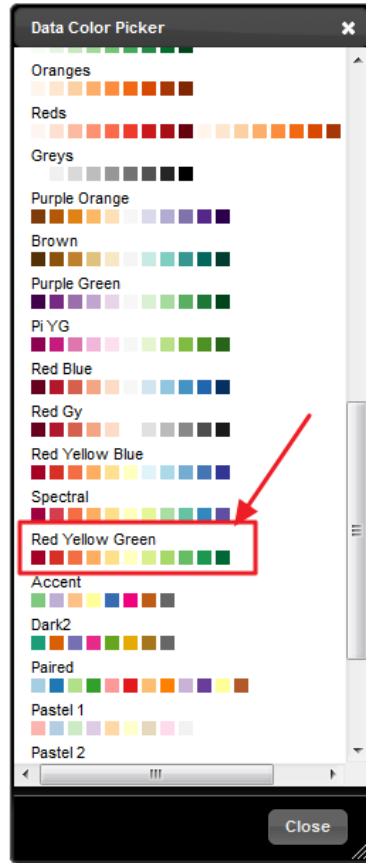


2. Select the "Red Yellow Green" palette

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Profit By Order_year , Customer Class,Product Line

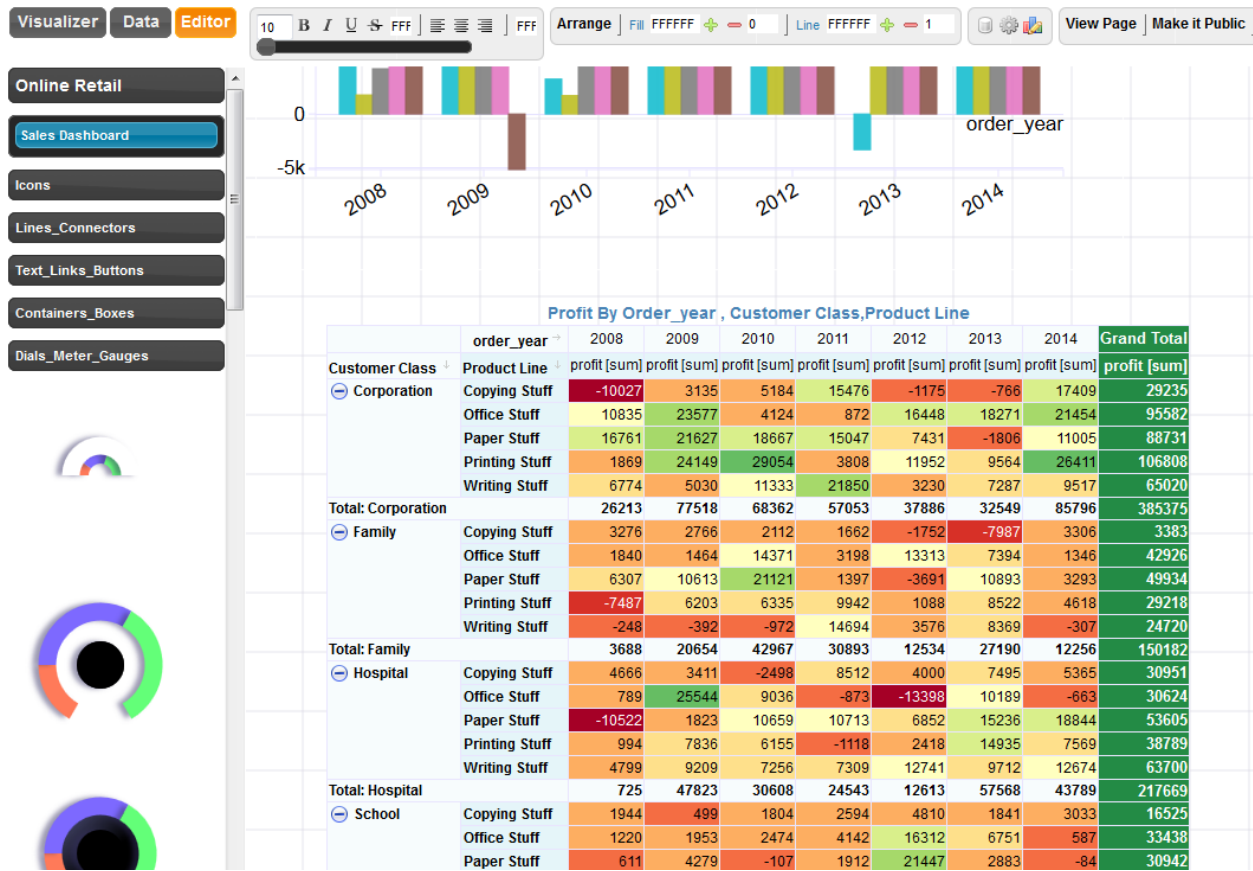
	order_year	2008	2009	2010	2011	2012	2013	2014	Grand Total
Corporation	Copying Stuff	-10027	3135	5184	15476	-1175	-766	17409	29235
	Office Stuff	10835	23577	4124	872	16448	18271	21454	95582
	Paper Stuff	16761	21627	18667	15047	7431	-1806	11005	88731
	Printing Stuff	1869	24149	29054	3808	11952	9564	26411	106808
	Writing Stuff	6774	5030	11333	21850	3230	7287	9517	65020
Total: Corporation		26213	77518	68362	57053	37886	32549	85796	385375
Family	Copying Stuff	3276	2766	2112	1662	-1752	-7987	3306	3383
	Office Stuff	1840	1464	14371	3198	13313	7394	1346	42926
	Paper Stuff	6307	10613	21121	1397	-3691	10893	3293	49934
	Printing Stuff	-7487	6203	6335	9942	1088	8522	4618	29218
	Writing Stuff	-248	-392	-972	14694	3576	8369	-307	24720
Total: Family		3688	20654	42967	30893	12534	27190	12256	150182
Hospital	Copying Stuff	4666	3411	-2498	8512	4000	7495	5365	30951
	Office Stuff	789	25544	9036	-873	-13398	10189	-663	30624
	Paper Stuff	-10522	1823	10659	10713	6852	15236	18844	53605
	Printing Stuff	994	7836	6155	-1118	2418	14935	7569	38789
	Writing Stuff	4799	9209	7256	7309	12741	9712	12674	63700
Total: Hospital		725	47823	30608	24543	12613	57568	43789	217669
School	Copying Stuff	1944	499	1804	2594	4810	1841	3033	16525
	Office Stuff	1220	1953	2474	4142	16312	6751	587	33438
	Paper Stuff	611	4279	-107	1912	21447	2883	-84	30942
	Printing Stuff	1305	1010	-4898	743	15348	714	-1102	13120
	Writing Stuff	1191	-1138	962	923	-2701	244	-1194	-1714
Total: School		6270	6603	235	10315	55216	12432	1240	92312
Small Business	Copying Stuff	2287	1568	5427	-2291	-3706	5554	13309	22148
	Office Stuff	-1547	1424	12022	21082	3843	8563	8552	53939
	Paper Stuff	9585	2768	6404	20698	5963	15488	16418	77324
	Printing Stuff	8992	5506	9130	10907	10934	9042	-706	53804
	Writing Stuff	8203	8539	15734	4079	5134	3527	2248	47463
Total: Small Business		27519	19806	48716	54476	22168	42174	39820	254678
Grand Total		64416	172404	190888	177278	140418	171913	182900	1100217



Your pivot table is now automatically color coded to a Heatmap. The negative numbers are deep red and the higher positive numbers are green.

Add this pivot table to the dashboard.

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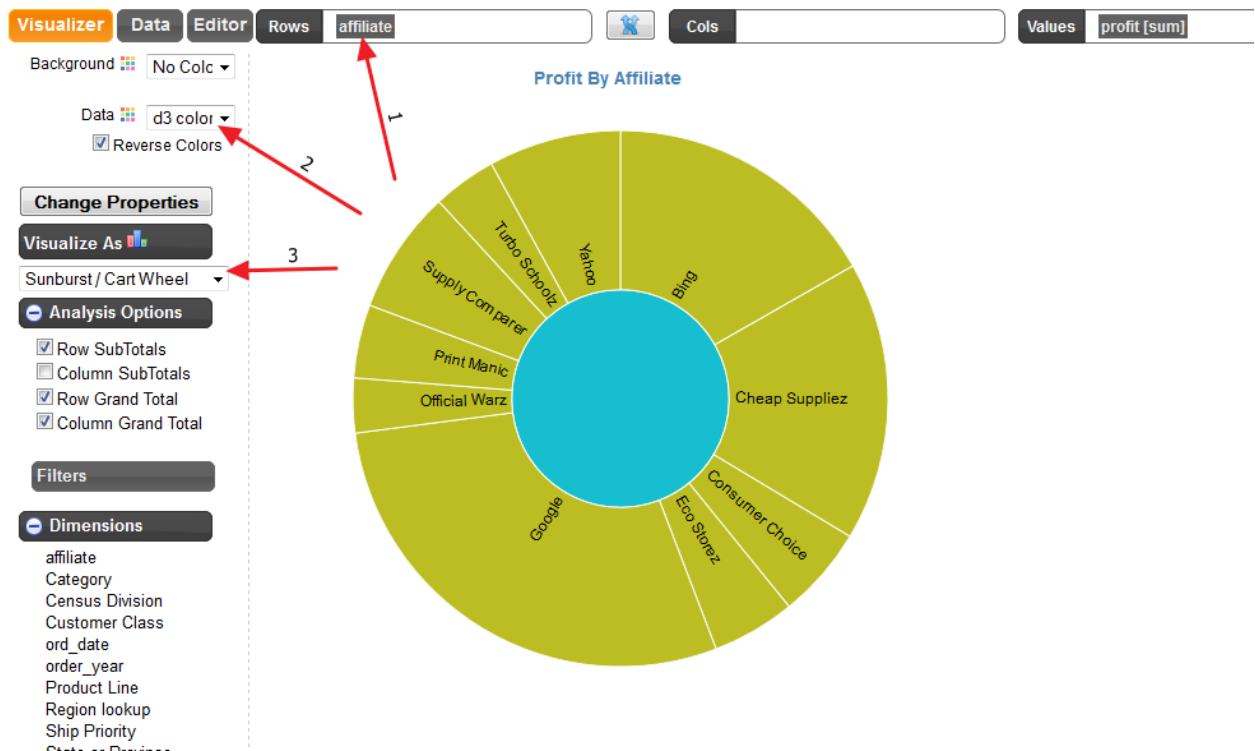


Add Sunburst diagram to the dashboard

1. Go back to the Visualizer
2. Follow the steps to produce the sunburst diagram

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3.



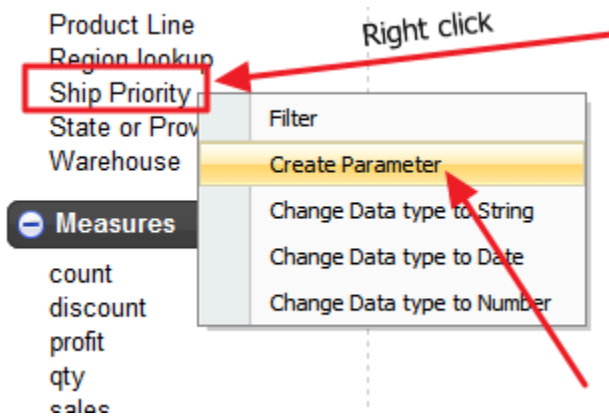
4. Add it to the dashboard

Add filter to the dashboard

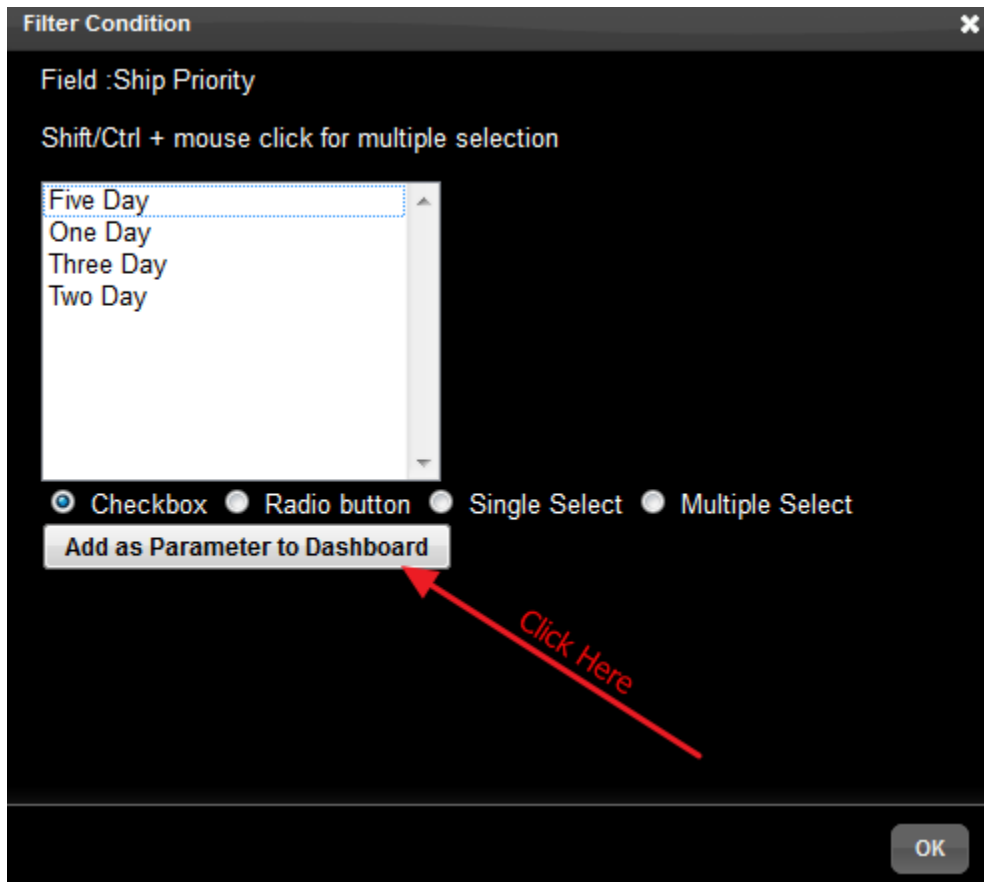
Once all your four widgets are added to the dashboard, we will add a parameter/filter to make it more interactive.

1. Go back to the Visualizer
2. Right click on "Ship Priority"
3. Select "Create Parameter"

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- 4.
- 5. It will show the following filter dialog

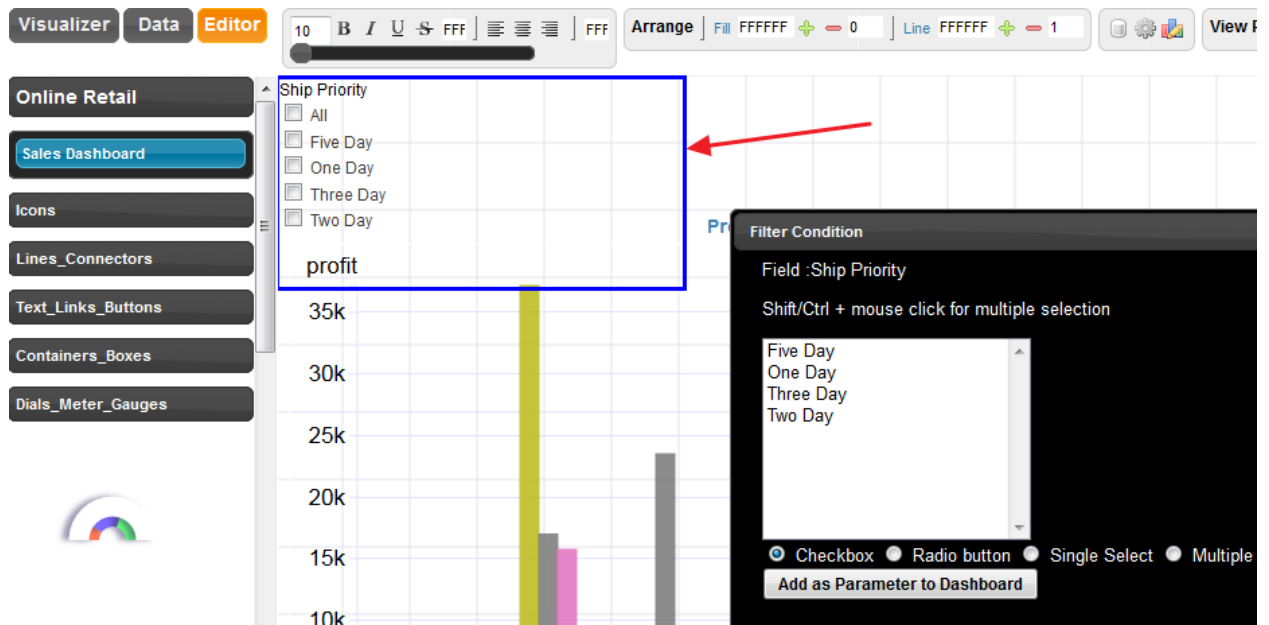


- 6.
- 7. You can select the type of parameter and the options are "Checkbox", "Radio Button", "Single select" dropdown, "Multi select " combobox.
- 8. We will keep the default selection of "Checkbox"

9. Click on "Add as Parameter to Dashboard"

10. The parameter is added to the dashboard as shown below

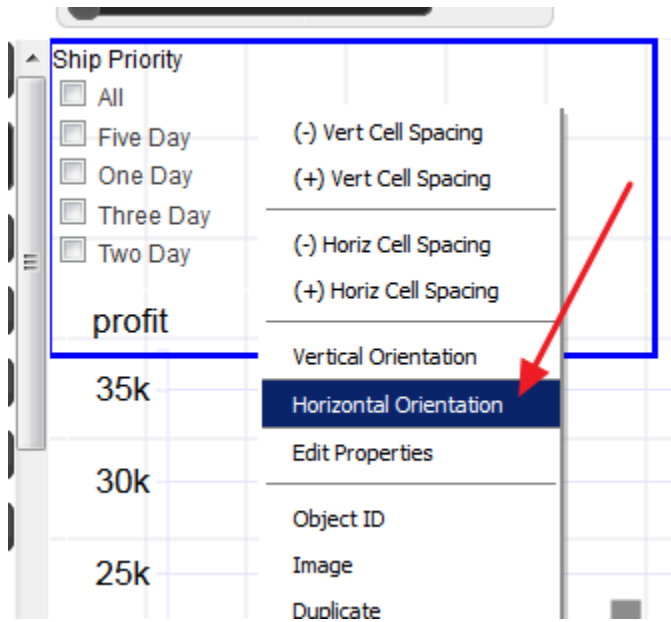
11.



12. As seen, the parameter is vertically oriented.

13. Close the parameter/Filter dialog box

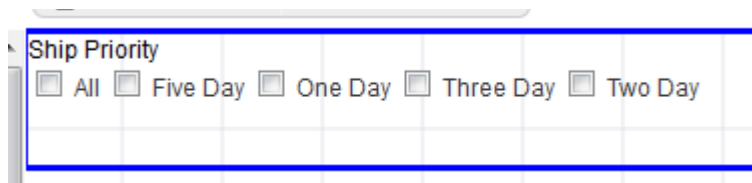
14. Right click on the new checkbox anywhere within the blue border



15.

16. Select "Horizontal Orientation"

17. Drag the blue border to make room for horizontal placement so that all checkboxes are in same row



18.

We added the checkbox parameter, similarly we can add as many parameters to the dashboard if needed.

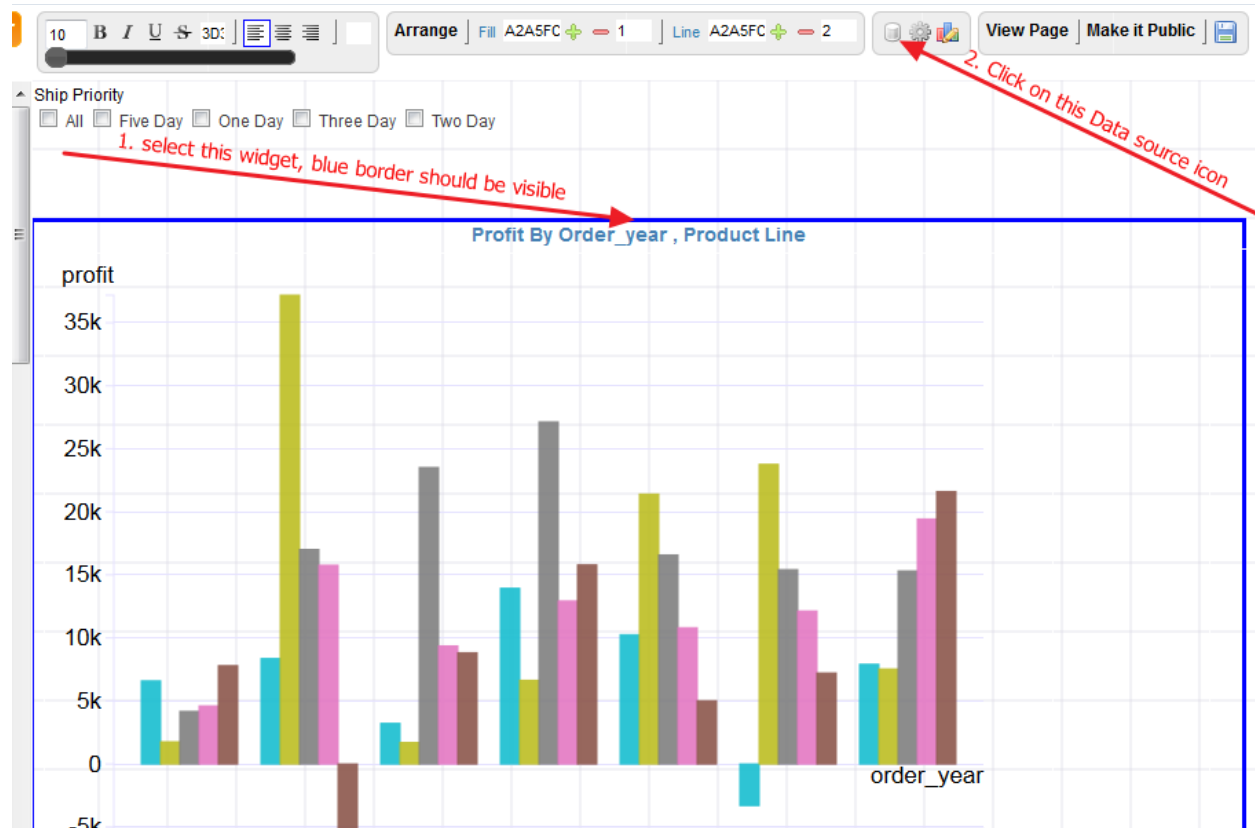
Next we will see how to connect the parameter to the widgets.

NOTE: Connecting the parameters to the widgets is needed for any database type connection. If you used CSV file upload to create a packaged dashboard with data inside then you don't need the linking. They are automatically linked for packaged dashboard.

Link Parameter to the widgets

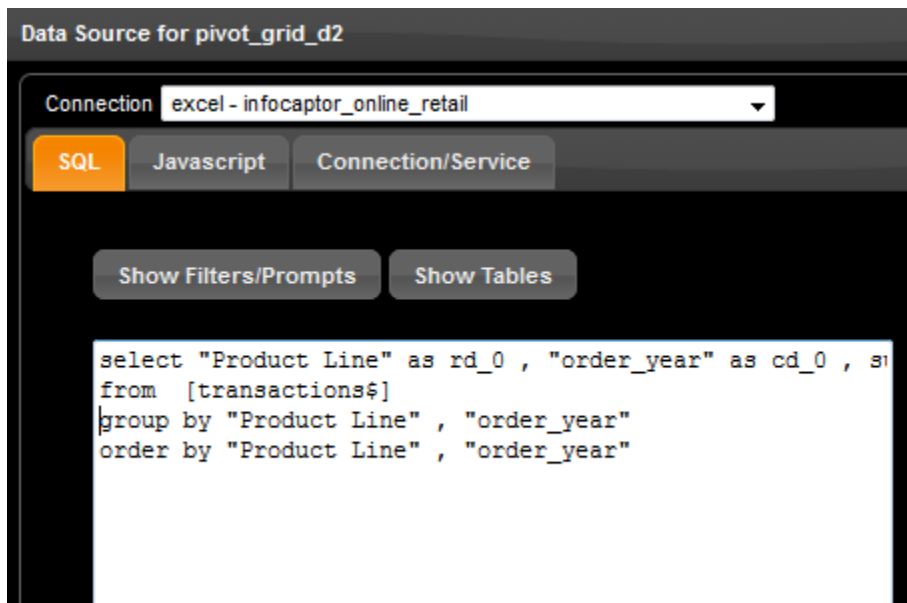
The manual linking of parameters has some benefits such that you can choose which widgets will respond to the user selections.

In the following steps we will link the "Ship Priority" to just the top two widgets such as the "Group bar chart" and the "Circle pack"

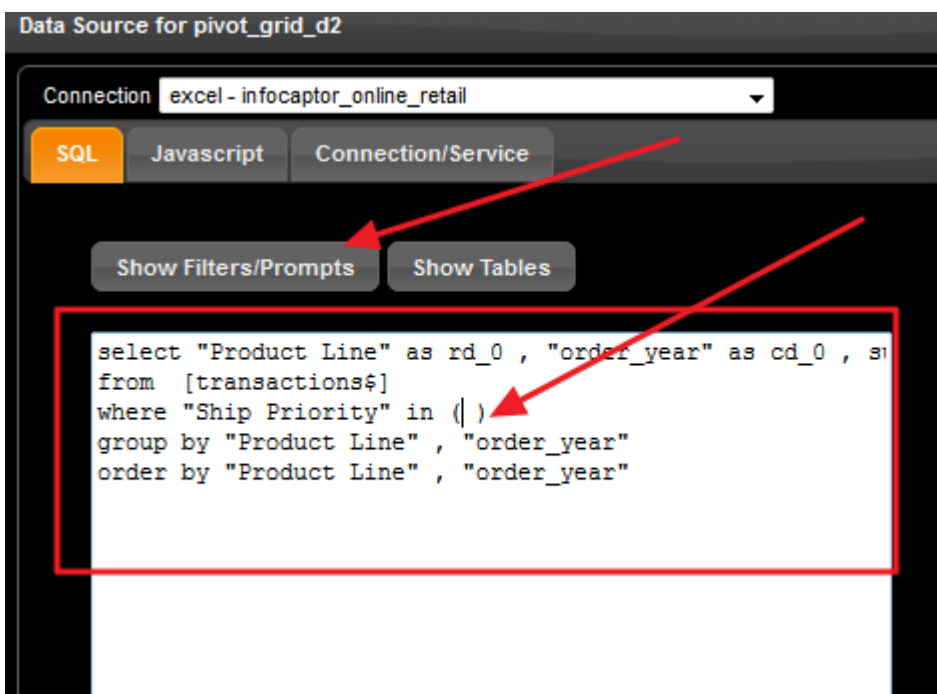


1. Select the bar chart widget, note the blue border is showing to confirm it is selected
2. Click on the "Data source" icon

3. It shows the SQL as below



4. Just before the group statement in the SQL, press enter and type the following condition

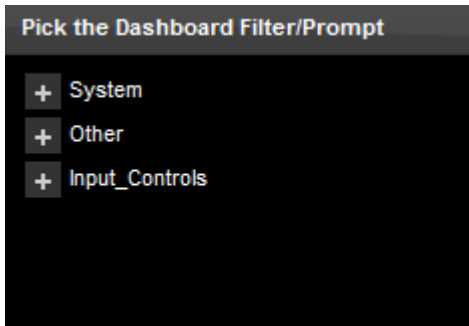


5.

6. where "Ship Priority" in ()

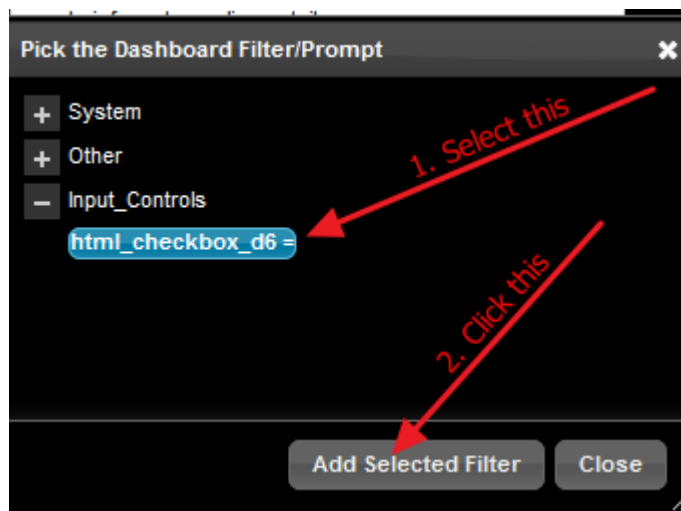
7. Bring your cursor within the brackets

8. Click on the "Show Filter Prompts"



9.

10. Expand "Input_Controls"

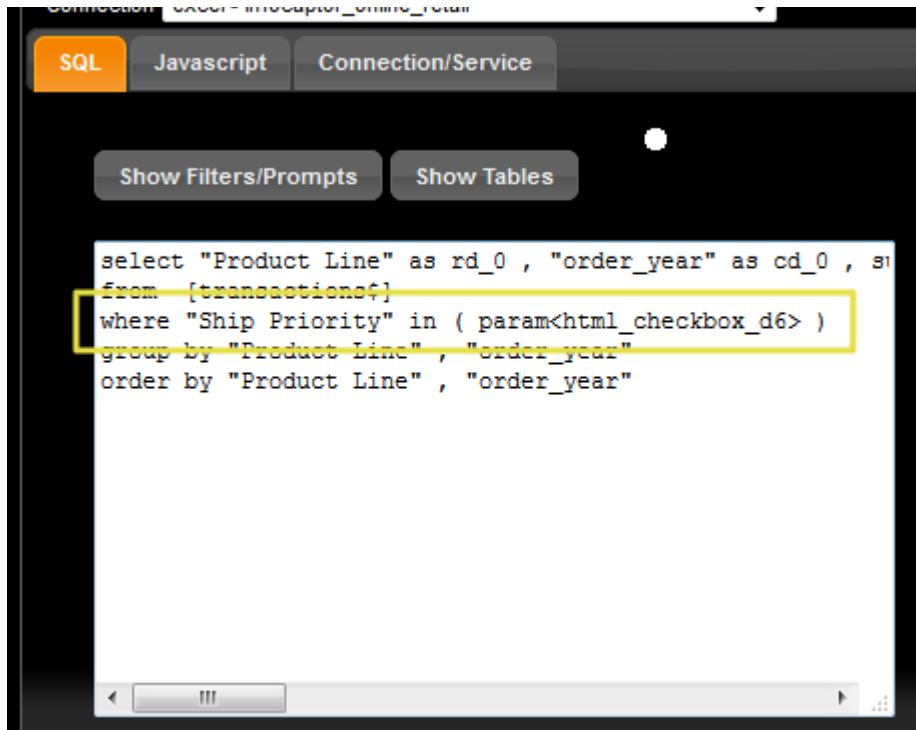


11.

12. Select the "html_checkbox_d6"

13. Click on the "Add Selected Filter" button

14. This action will add the filter values between the brackets where your cursor is. If your cursor was somewhere else, then just copy the new text and place it between the brackets



15.

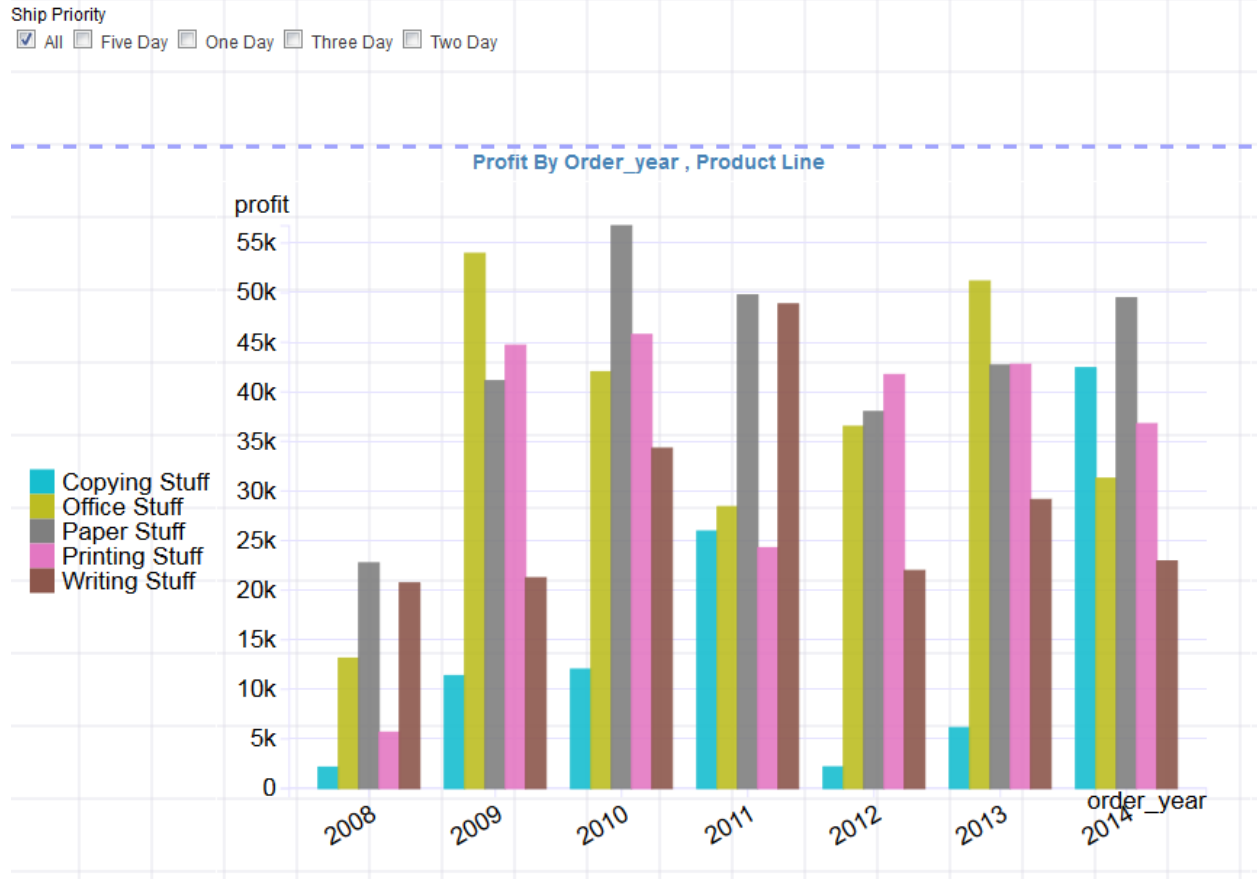
16. Final where condition { where "Ship Priority" in (param<html_checkbox_d6>) }

16. Click OK and close the "Data Source" window

Test the interaction for the filter selection

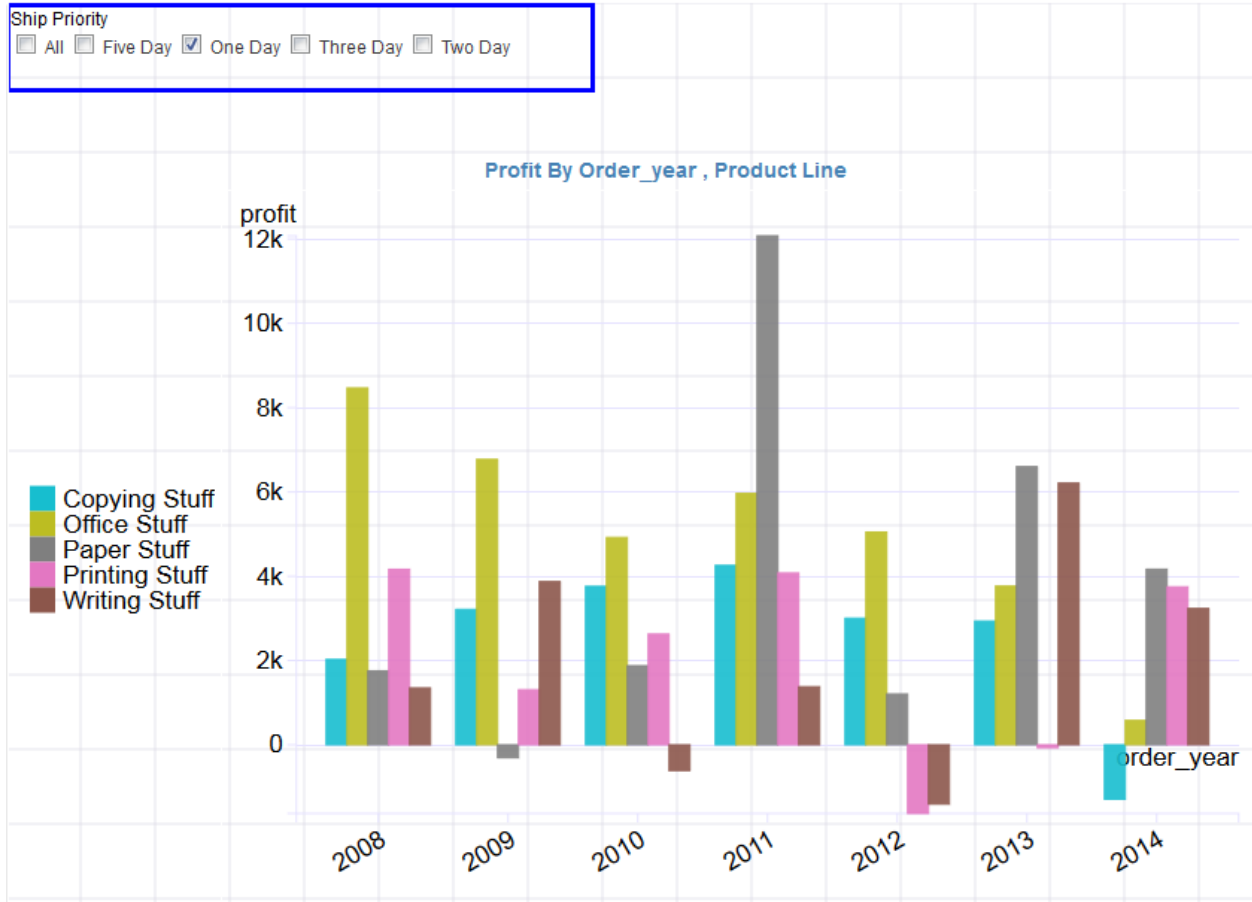
1. Select "ALL"

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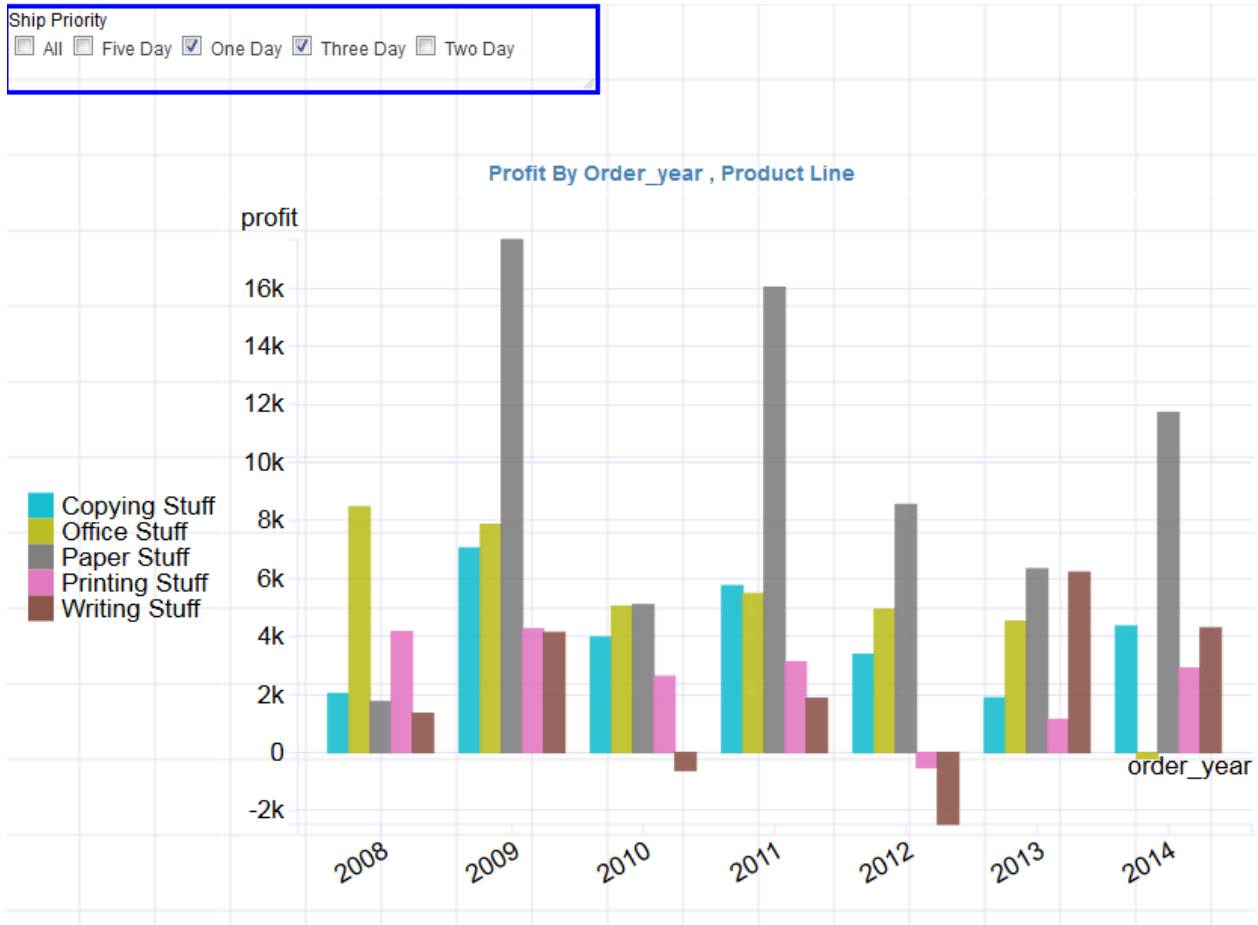
2. De-Select "All" and select "One Day"

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3. Select "Three Day" as well

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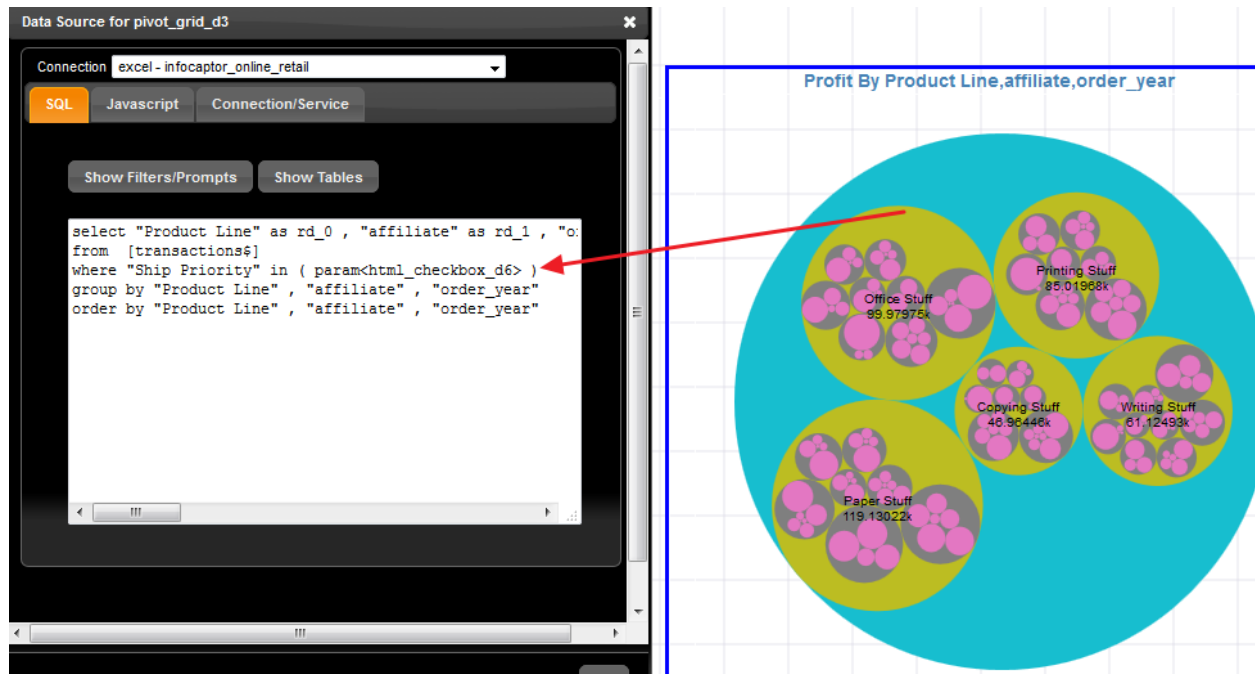


As you notice the chart has now become interactive and responds to the parameter selections.

We repeat the process for the Circle pack widget and make it interactive as well. For the circle pack we can simply copy the where condition and paste it in the SQL

where "Ship Priority" in (param<html_checkbox_d6>)

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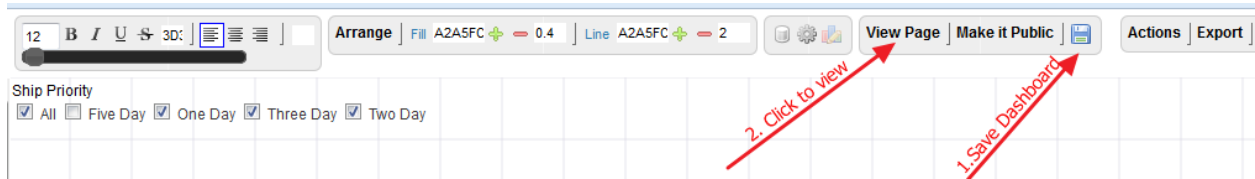
Click OK and now we are done.

We will keep the pivot table and the sunburst without linking to the parameter.

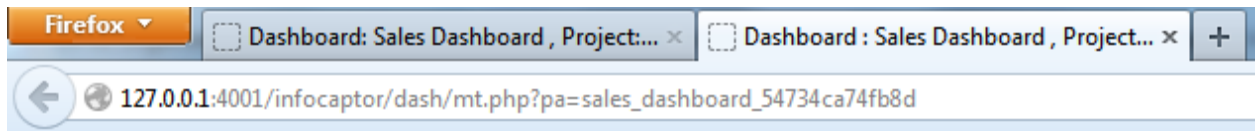
Now when you change the parameter selection both widgets respond accordingly.

Publishing the Dashboard

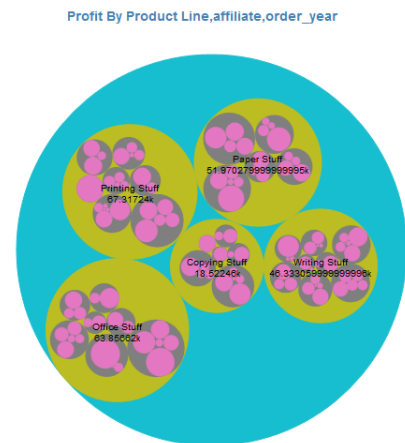
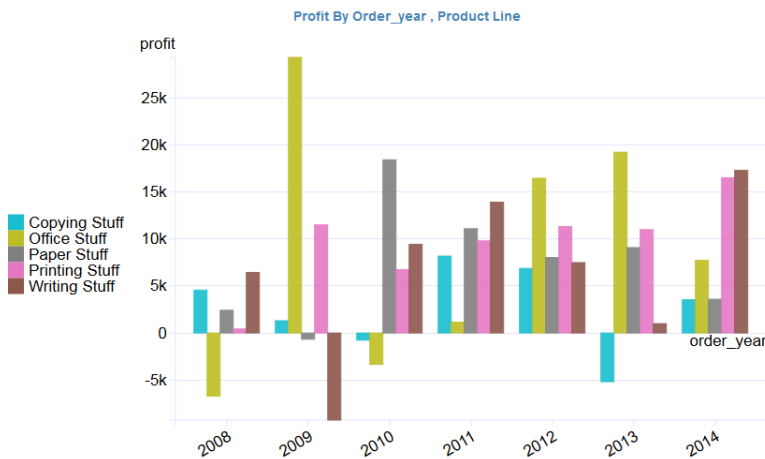
Once we are done adding all the four analysis and the dashboard parameter/filter, we can save the dashboard and then click on "View this Page"



Once you click on "View Page", it will open as independent URL



Ship Priority
 All Five Day One Day Three Day Two Day



Profit By Order_year , Customer Class,Product Line

Customer Class	Product Line	2008	2009	2010	2011	2012	2013	2014
Corporation	Copying Stuff	-10027	3135	5184	15476	-1175	-768	17409
	Office Stuff	10836	23677	4194	872	16448	18271	21484



This dashboard is only viewable by you or the person who has developed it. In order to have others view the dashboard and interact with it you need to share the dashboard.

There are two ways you can share your dashboard.

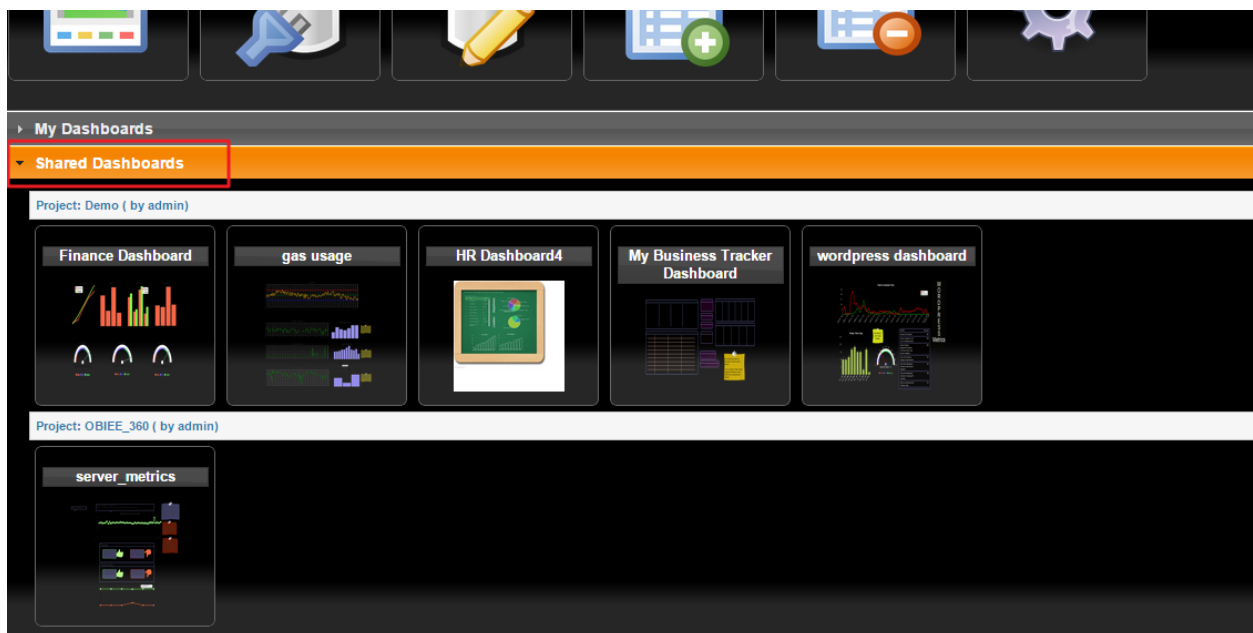
1. Private Sharing

2. Public Sharing

1. Private Sharing:

You can share the dashboard privately to a single user or a group of users. When you share the dashboard privately, the users can view the dashboard only when they login into InfoCaptor.

For e.g. When you share the dashboard and when the user logs in, they will see the following screen upon login



There are two sections "My Dashboards" and "Shared Dashboards"

Any dashboards that you develop will be visible under the "My Dashboards" section.

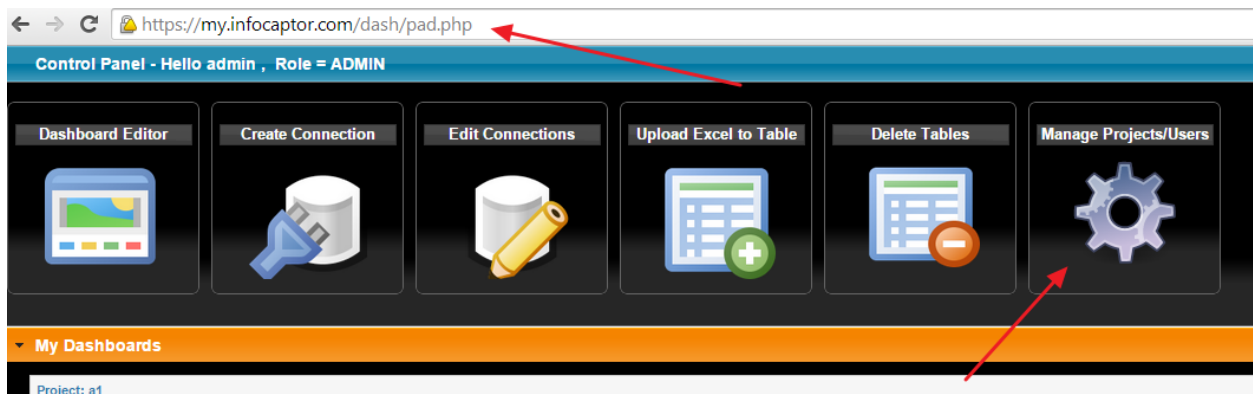
How to build Dashboards - How to create Excel dashboard

If someone shares the dashboard with you then it will be available under the "Shared Dashboards" section

Share a page directly to the user

You need to navigate to the "Manage Project/Users" page.

This can be done two ways. When you login, you will see a launchpad like below



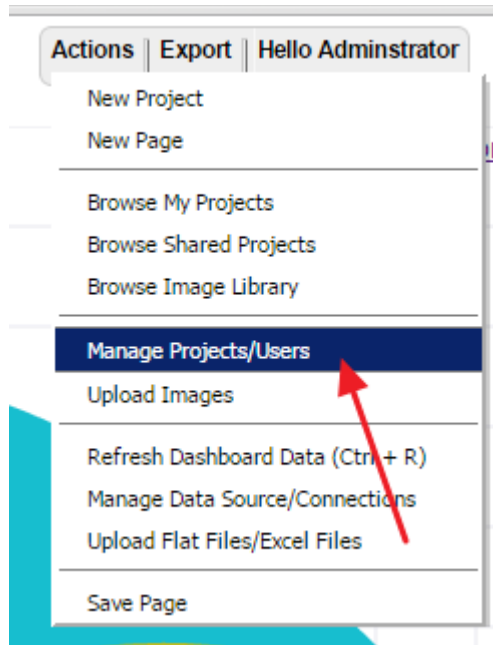
And you will see the big icon "Manage Projects/Users"

Click on that.

Alternatively, if you are in the Dashboard Editor, then navigate as

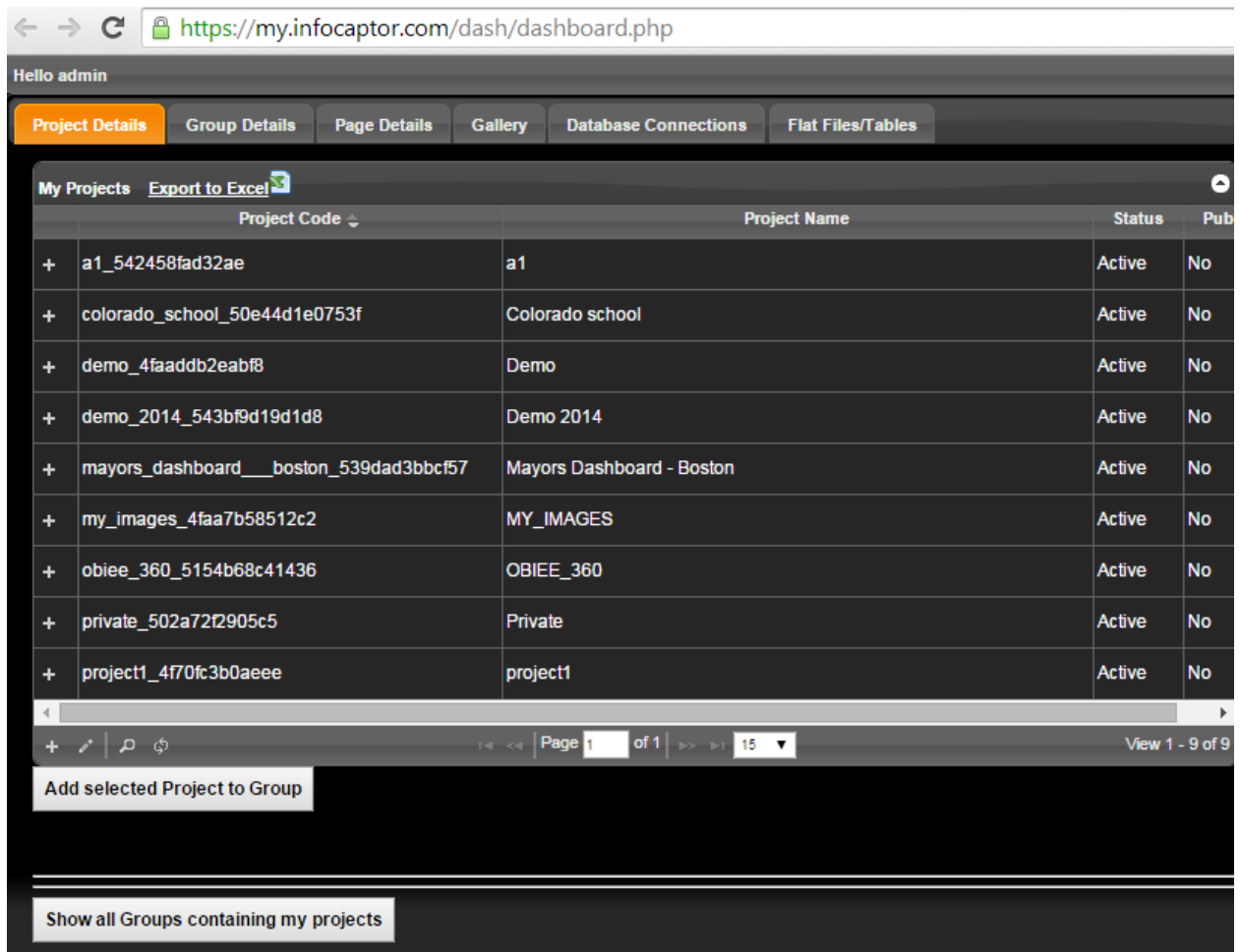
Actions >> Manage Projects/Users

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You should see something similar

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The screenshot shows a web browser at the URL <https://my.infocaptor.com/dash/dashboard.php>. The user is logged in as 'admin'. The dashboard has several tabs: 'Project Details' (selected), 'Group Details', 'Page Details', 'Gallery', 'Database Connections', and 'Flat Files/Tables'. The 'Project Details' tab displays a table of projects.

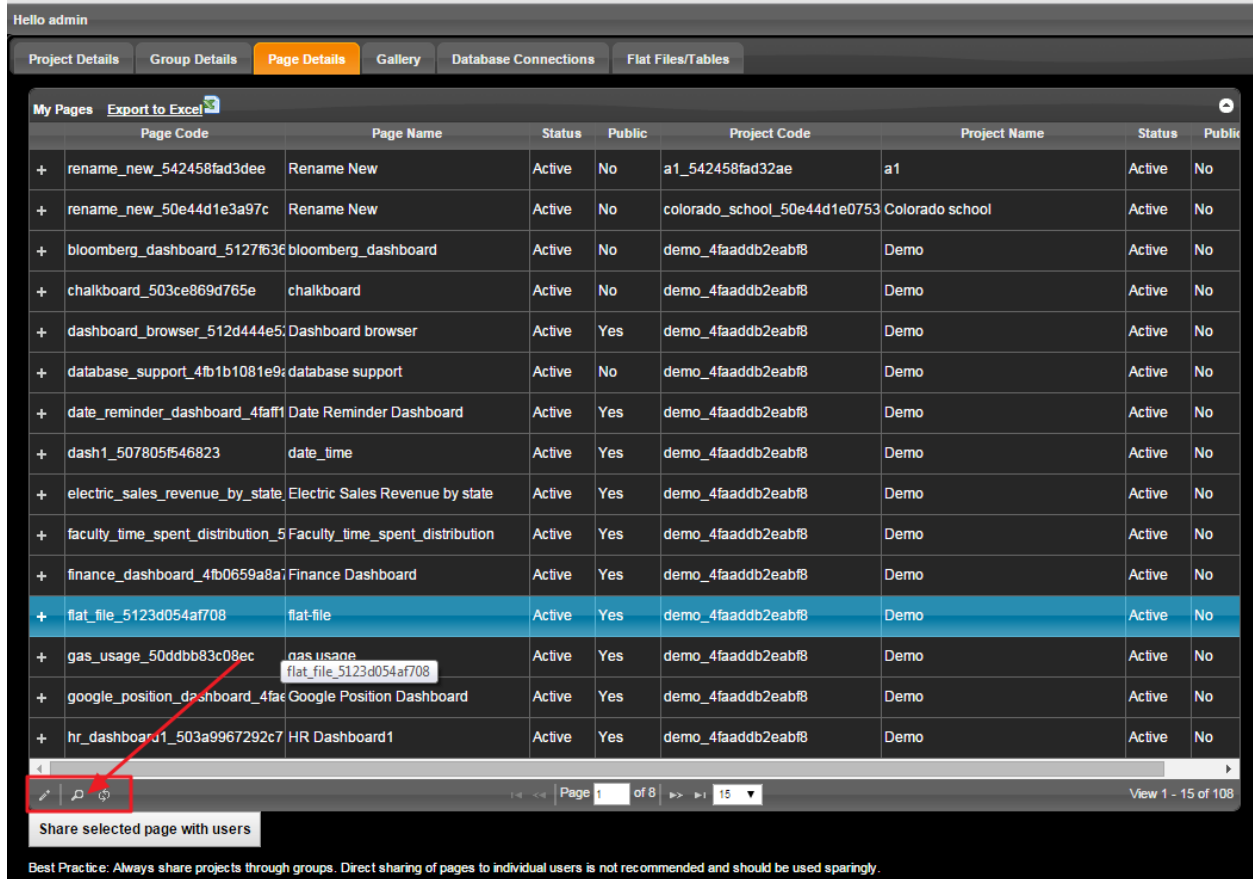
	Project Code	Project Name	Status	Pub
+	a1_542458fad32ae	a1	Active	No
+	colorado_school_50e44d1e0753f	Colorado school	Active	No
+	demo_4faadb2eabf8	Demo	Active	No
+	demo_2014_543bf9d19d1d8	Demo 2014	Active	No
+	mayors_dashboard___boston_539dad3bbc57	Mayors Dashboard - Boston	Active	No
+	my_images_4faa7b58512c2	MY_IMAGES	Active	No
+	obiee_360_5154b68c41436	OBIEE_360	Active	No
+	private_502a72f2905c5	Private	Active	No
+	project1_4f70fc3b0aeec	project1	Active	No

At the bottom of the page, there are two buttons: 'Add selected Project to Group' and 'Show all Groups containing my projects'. The page navigation shows 'Page 1 of 1' and 'View 1 - 9 of 9'.

There are multiple tabs, Projects, Groups, Pages and other things.

Jump to the "Page Details"

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Hello admin

Project Details | Group Details | **Page Details** | Gallery | Database Connections | Flat Files/Tables

My Pages [Export to Excel](#)

	Page Code	Page Name	Status	Public	Project Code	Project Name	Status	Public
+	rename_new_542458fad3dee	Rename New	Active	No	a1_542458fad32ae	a1	Active	No
+	rename_new_50e44d1e3a97c	Rename New	Active	No	colorado_school_50e44d1e0753	Colorado school	Active	No
+	bloomberg_dashboard_5127f63e	bloomberg_dashboard	Active	No	demo_4faaddb2eabf8	Demo	Active	No
+	chalkboard_503ce869d765e	chalkboard	Active	No	demo_4faaddb2eabf8	Demo	Active	No
+	dashboard_browser_512d444e5	Dashboard browser	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	database_support_4fb1b1081e9	database support	Active	No	demo_4faaddb2eabf8	Demo	Active	No
+	date_reminder_dashboard_4faf1	Date Reminder Dashboard	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	dash1_507805f546823	date_time	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	electric_sales_revenue_by_state	Electric Sales Revenue by state	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	faculty_time_spent_distribution_5	Faculty_time_spent_distribution	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	finance_dashboard_4fb0659a8a7	Finance Dashboard	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	flat_file_5123d054af708	flat-file	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	gas_usage_50ddb83c08ec	gas usage flat_file_5123d054af708	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	google_position_dashboard_4fae	Google Position Dashboard	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	hr_dashboard1_503a9967292c7	HR Dashboard1	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No

Page 1 of 8 | View 1 - 15 of 108

Share selected page with users

Best Practice: Always share projects through groups. Direct sharing of pages to individual users is not recommended and should be used sparingly.

You can click on the search icon to look for your page. If you see your page, then just click on it once so that it is highlighted.

In this example, we selected the "bloomberg dashboard"

How to build Dashboards - How to create Excel dashboard

The screenshot shows the Infocaptor dashboard interface. At the top, there is a navigation bar with tabs: Project Details, Group Details, Page Details (selected), Gallery, Database Connections, and Flat Files/Tables. Below the navigation bar, there is a header 'Hello admin' and a sub-header 'My Pages' with an 'Export to Excel' button. The main content is a table with columns: Page Code, Page Name, Status, Public, Project Code, Project Name, Status, and Public. The table contains 15 rows of data. A red arrow points to the 'bloomberg_dashboard_5127f63e' row with the text '1. Click to select'. Another red arrow points to the 'Share selected page with users' button with the text '2. Click to share'. Below the table, there is a pagination bar showing 'Page 1 of 8' and 'View 1 - 15 of 108'. At the bottom, there is a note: 'Best Practice: Always share projects through groups. Direct sharing of pages to individual users is not recommended and should be used sparingly.'

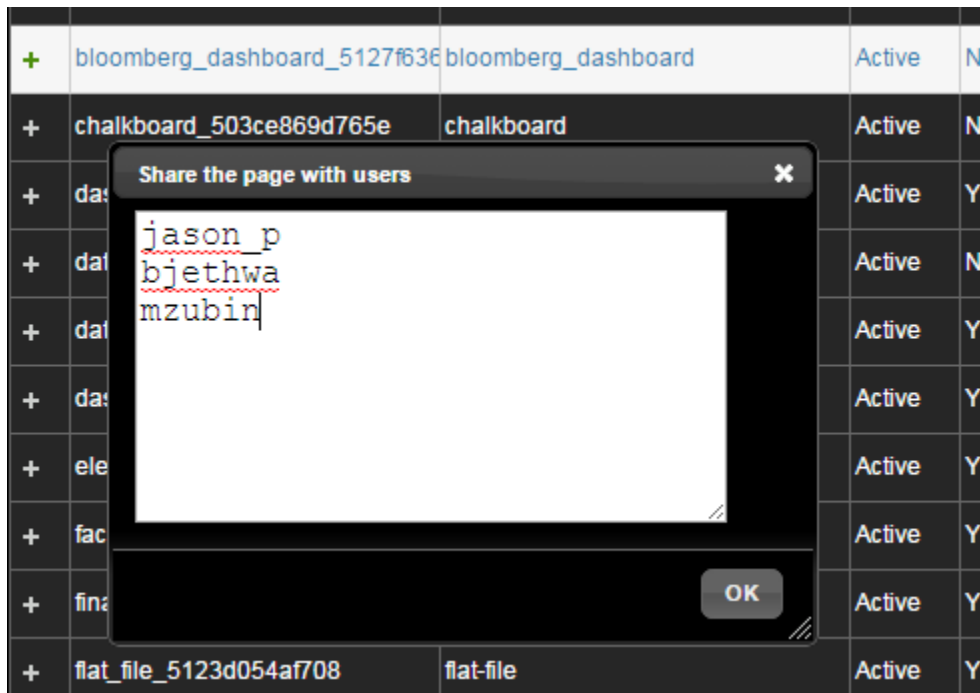
	Page Code	Page Name	Status	Public	Project Code	Project Name	Status	Public
+	rename_new_542458fad3dee	Rename New	Active	No	a1_542458fad32ae	a1	Active	No
+	rename_new_50e44d1e3a97c	Rename New	Active	No	colorado_school_50e44d1e0753	Colorado school	Active	No
+	bloomberg_dashboard_5127f63e	bloomberg_dashboard	Active	No	demo_4faaddb2eabf8	Demo	Active	No
+	chalkboard_503ce869d765e	chalkboard	Active	No	demo_4faaddb2eabf8	Demo	Active	No
+	dashboard_browser_512d444e5f	Dashboard browser	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	database_support_4fb1b1081e9f	database support	Active	No	demo_4faaddb2eabf8	Demo	Active	No
+	date_reminder_dashboard_4faf11	Date Reminder Dashboard	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	dash1_507805f546823	date_time	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	electric_sales_revenue_by_state	Electric Sales Revenue by state	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	faculty_time_spent_distribution_5	Faculty_time_spent_distribution	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	finance_dashboard_4fb0659a8a	Finance Dashboard	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	flat_file_5123d054af708	flat-file	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	gas_usage_50ddb83c08ec	gas usage	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	google_position_dashboard_4fae	Google Position Dashboard	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No
+	hr_dashboard1_503a9967292c7	HR Dashboard1	Active	Yes	demo_4faaddb2eabf8	Demo	Active	No

Share selected page with users

Best Practice: Always share projects through groups. Direct sharing of pages to individual users is not recommended and should be used sparingly.

When you click on "Share selected page with users"

It opens this dialog



We provide the user id (login name) for each user we intend to share the dashboard with.

Each user is entered in a separate line

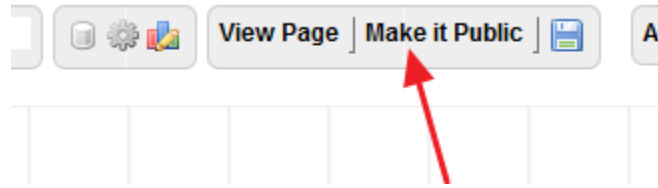
Click OK and you should see a confirmation.

When these individual users login or browse the shared dashboards, they will see new entries in their list.

2. Public Sharing

Public sharing is one click job. In your dashboard editor, you will see the link 'Make it Public' on the top toolbar

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Click on it once and now you can share your dashboard by just passing the URL with anybody in your company or network. Making it public simply means that the users don't need to login to view the dashboard. They can still fully interact with the dashboard.