

CEWS – ALL ABOUT DASHBOARDS

July 26, 2017

QUESTIONS & ANSWERS

- 1. Is there another session (recorded or otherwise) about Drill Across Designer?**
 - a. No there is not. Drill across designer is the web version of the smart client application relational data view. The functionality is almost identical, so if you know how to build drill across in the smart client you will likely be able to in the web client.
- 2. When will templates created in the web be available in the smart client, so workflows can be created using them?**
 - a. This is already a function within the software, when you are attaching a template make sure you change the drop down for “files of type” to Template Studio instead of Template Studio Classic.
- 3. Can you copy the dashboard from test system say to prod system?**
 - a. This is a question for support, please create a ticket and they will be happy to help!
- 4. Can you assign more than one dashboard to an individual?**
 - a. The admin can create multiple dashboards and assign them to users. However, only one dashboard can be selected as the main one.
- 5. Can you only link a badge to a data view?**
 - a. Badges can also be just a fixed value you wish to display, however more business cases involve using a data view. Charts are the only other tile that use data views.
- 6. I am an administrator and would like to test the announcement feature - to see if flow to the dashboard; however, if I hit "publish" will it go to all users now, or can I select just myself to see how it works first.**
 - a. Hitting ‘Publish’ will send the announcement to all users. You can however delete the announcement so the users won’t see it up for too long.
- 7. Are dashboards supported on a mobile device?**
 - a. Yes
- 8. When will the next web release be?**
 - a. The next release is in the fall. It will include more admin features.
- 9. Which version of Prophix is used in the demo?**
 - a. Version 12.5.0.37302, you can check your version by clicking the “about” application in either the smart or web client.
- 10. Will Waterfall chart be available in dashboards?**
 - a. Planned but if you can reach out to provide business use cases that would help our team quite a bit!

- 11. Can a description (where you typed Current Month on the Badge) be a Dynamic Name that changes with the Current Month?**
 - a. Currently, the description cannot be dynamic, it must be a text field. Because of this we do recommend putting a generic title such as 'Current Month'
- 12. How do you modify the default Welcome dashboard that comes in the install? Where is the Dashboard?**
 - a. This dashboard does not have a file linked to it, so unfortunately there isn't anywhere we can direct you to. This dashboard is an exception to the rule, all other dashboards will be a saved file within your Prophix.
- 13. How do you format text in announcements so that it's not just a string of text?**
 - a. Currently there is no formatting capabilities in announcements. The idea is for it to be a brief message that gets displayed in the tile.
- 14. Are dashboards available in version 12, I don't see them available**
 - a. Yes they are! You simply need to access the web client portion of version 12. If you are an on premise customer the web address is your server name. Speak to your IT if you aren't sure how to access this.
- 15. Does the dashboard have dynamic functionality in the face of the dashboard? That is, can a user changes the scope of the dashboard (date, segment) with a click of a button.**
 - a. Yes the dashboards are fully dynamic meaning the user can interact with the various tiles. If there is an iFrame tile, the user can click around in the web link without leaving the webclient. In a chart, the user can drill down the chart and have the data update as they drill into the different components.
- 16. How do I assign a template to a users favorite list?**
 - a. As an admin, you have access to Favorites Manager which let you see and control which files are on a user's favorite list
- 17. Can you copy charts from one dashboard to another?**
 - a. The easiest way to do this is to do a "save as" of your dashboard so you can keep that chart and then add/remove other aspects as needed.
- 18. Can a dashboard be printed out or downloaded to excel?**
 - a. Currently there is no direct print out of a dashboard. The workaround would be to print the entire webpage screen by using the print settings on the internet browser or screenshots.
- 19. In later versions will you be able to change the color pallet for charts/graphs?**
 - a. Potentially in the future
- 20. Can someone other than an administrator design and assign dashboards?**
 - a. Users that have Template Studio full access will have access to dashboard studio – it's the same license type. However, only admins can use the assign functionality within dashboards studio.
- 21. Is there a way to "try out" the announcement section of the dashboard without sending announcements to everyone with access to Prophix. I am an administrator on our application, but I don't think any announcements have been created to date. I'd like to send one just to me. And see how it appeared on the dashboard but wasn't sure what**

would happen when I hit “publish” (if I could choose recipients or if it automatically pushed out to everyone). I looked at the on-line help function of Prohix and can’t find the answer.

- a. Refer to QUESTION 6.