

All About Dashboards

Customer Empowerment Webinar Series



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Agenda

- Introduction to the Web Client
- Introduction to Dashboards
- Demo: building a few charts from scratch
- Analyzing your dashboard data
- Assigning a welcome dashboard



Demo

 **Prophix[®]**



Introduction to Dashboards

- Dashboard studio (think of it like template studio)
- Different types of charts/badges
- Setup of each type and the consistencies
- Previewing your completed dashboard







Polling Question 1



Introduction to Dashboards





My Tasks

	Budget Deadline Reminder!!! Waiting	Oct 4, 2017
	Final Review Not started	Nov 15, 2017

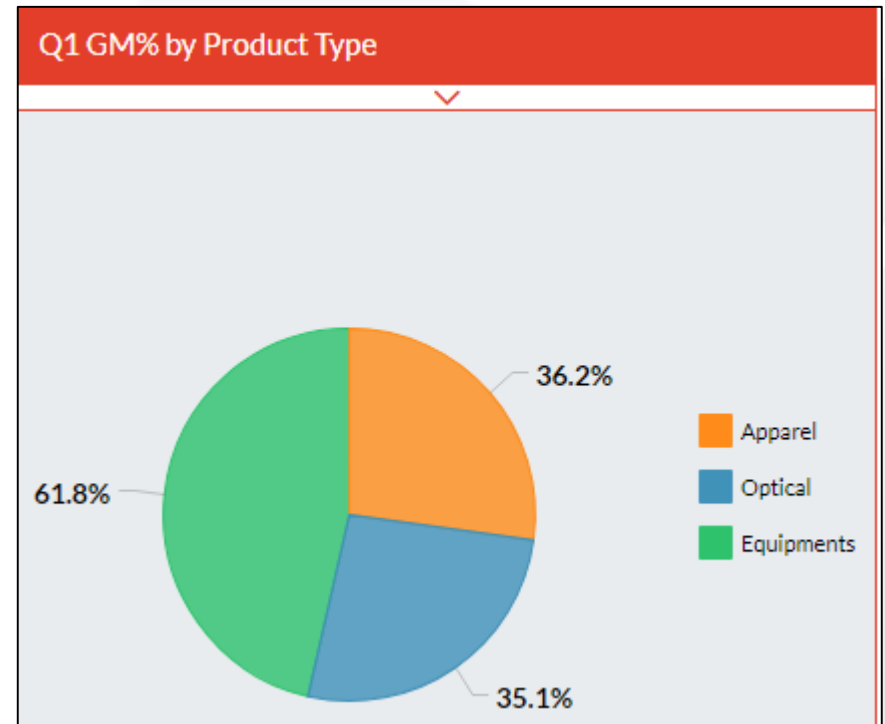
Q1 Sales Target

18,071,804

Favorites

-  **Revenue by Product Line**
Date added: May 4, 2015
-  **Sales Dashboard**
Date added: Jul 4, 2017
-  **Income Statement Variance**
Date added: Jul 4, 2017
-  **Top 5 Salespeople**
Date added: Jul 4, 2017

Introduction to Dashboards



Setting up a dashboard

- **Workflow tasks:** make sure your workflow project has been set up in smart client
- **Badge:** underlying data view must be set up (will display first top left cell of data)
- **iFrame:** simply insert web page desired
- **Announcements:** set up in smart client first
- **Favorites:** user must have favorites pinned first
- **Chart:** ensure underlying data view is ready



Demo

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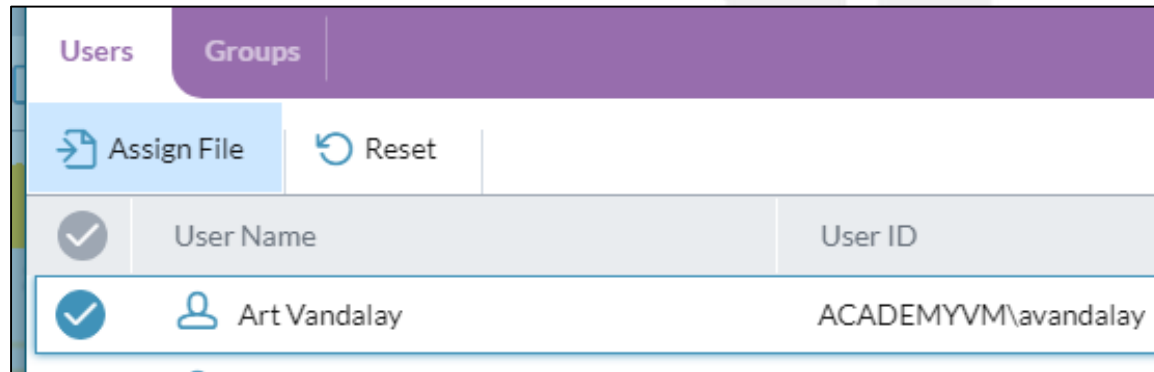


Polling Question 2



Assigning a Completed Dashboard

- **Step 1: open dashboard in design mode (through dashboard studio)**
- **Step 2: click on assign and browse for your dashboard**



Tips & Tricks

- Keep all member selections dynamic (i.e. named sets)
- Remember **badges** take the top left cell of data – but you can display more in the data view
- Different users can see different dashboards and **security will always be applied**
- Start discussions on what metrics are most important to your organization





Polling Question 3





Questions?



Thank You!