Alemba User Day
Alemba Service Manager Skills

Alemba Dashboard Designer

Version 1.0

Table of Contents

As the data is subject to change, any statistical information in screen examples may differ from your installation.

About the Guide

This guide is structured so that you get the most out of your learning experience.

The concepts are delivered by the instructor either by discussion or demonstration. The guide is intended as a learning resource and is yours to keep after the training is completed.

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Welcome to the Alemba User Conference 2019 Training

This year, we are here to show you how to use our new third-party dashboard tool, Syncfusion.

In the first session we will look at Dashboarding, and topics during this session will include:

- Creating a Dashboard

- Creating different types of widgets within a Dashboard

- Manipulating the Data display to show different statistical information

- Linking dashboards, so that you can drill down between dashboard displays

This session is fully interactive. You can work along with the instructor during the teaching section and will have time to complete an exercise at the end that is designed to reinforce your learning and give you an opportunity to put your skills into practice.

Using the *Alemba Dashboard Designer*

This section will give you some guidance to how to launch the Dashboard Designer application and an overview of the main areas of the screen.
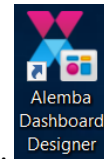
1. Launch the *Alemba Dashboard Designer*, using the icon on your desktop.

2. The Dashboard Designer screen is displayed, containing the following elements:

- o   The Dashboard Designer Main Menu

    - •   File - Create New Dashboard, Open, Save, Import, Export

    - •   Edit - Copy, Paste, Undo, Redo

    - •   Dashboard - Add a new Dashboard Page to the existing Dashboard. Launch a Preview, set a global Parameter, set global Filters, configure the Dashboard Refresh Settings and enable/ disable commenting for the current dashboard.

    - •   Data Source - Add or Import a Data Source.

    - •   Widget - Import or manage Custom Widgets.

    - •   Server - Uploading Dashboards, Widgets or Data Sources to the Dashboard Server.

    - •   Help - Access to the Online Help, Tracing (for use in diagnosing Support Queries) and viewing the Log Files.

- o   The Dashboard Design Tools Pane

    - •   This pane will display relevant options for the selected widget in the Design View, allowing you to give the widget a name, assign data (from a configured Data Source) and present widget options.

- o   Preview

- This button will launch the Dashboard in a browser so the dashboard can be tested in real time, and if configured will allow you to preview a dashboard using other users permissions/roles.
  o Toolbox Pane
    - The Toolbox Pane consists of data visualizations, filters and miscellaneous widgets which you can use to design an interactive dashboard. Drag the desired widget onto the Design Area and resizing it using the usual marquee points.
  o Element Containers
    - Dashboards
      - This container allows you to add or remove Dashboards, adding more than one dashboard will display each dashboard as a separate page to that can be linked to from within this Dashboard or from any other Dashboard.
    - Data Sources
      - This Container allows you to add, modify or remove Data Sources which can then be used to display the data within the many Chart or Filter Widgets. Typically, you will connect to the Alemba Service Manager Database using either a SQL Server Connection or via the Alemba API.
    - Widgets
      - Each Dashboard page will contain one or many widgets. Widgets can be used for display purposes, adding user definable filters to a dashboard page or displaying the data using one of the many chart or grid styles available.
    - Linked Dashboards
      - Displays a list of the Dashboards that Widgets on the Current Dashboard Page have been linked to.
  o Responsive Dashboard Design View
    - This is a 24 by 12 grid view where Widgets can be dragged from the Toolbox Pane. Widgets can then be positioned and re-sized to design the Dashboard page. The Dashboard Design view shows a responsive web page view and is used to display the widgets proportionally on a monitor, large screen or mobile device. You can extend the height of the Dashboard Pages by dragging a widgets height beyond the bottom of the grid to automatically add additional rows.

Scenario: Global Team Workload Dashboard

The User Day Skills Training Course will work through a series of Step by Step exercises where you can follow the Trainer as they explain how to construct the first 3 pages of a Multi Tabbed Dashboard. There will then be a series of Workshop Challenges where you will be able to work through to complete the building of a 5-page Dashboard.

Dashboard Requirements

- As part of any organization it is often a requirement to easily view and display the workload of the many teams that operate within a department or business.

- To enable a line manager or supervisor to have simple access to this information without having to build a report or dashboard per team.

Dashboard Design

Provide a Multi Tabbed Dashboard containing the following 5 Dashboard Pages:

1. Global Team Dashboard - The Main Page - A Dashboard to show an overview of all Calls, Requests and Tasks

2. Team Calls Workload - Linked from the Main Page to display the overview of the Open Calls for a particular team, complete with User Changeable Filters and KPIs.

3. Analyst Calls Workload - Linked from the Team Calls page to display an overview of a particular Analysts current workload.

4. Team Requests - Linked from the Main Page to display the Open Requests by each Workflow Group and also by Location.

5. Team Tasks - Linked from the Main Page to display the Active Tasks being worked on by each Workflow Group.
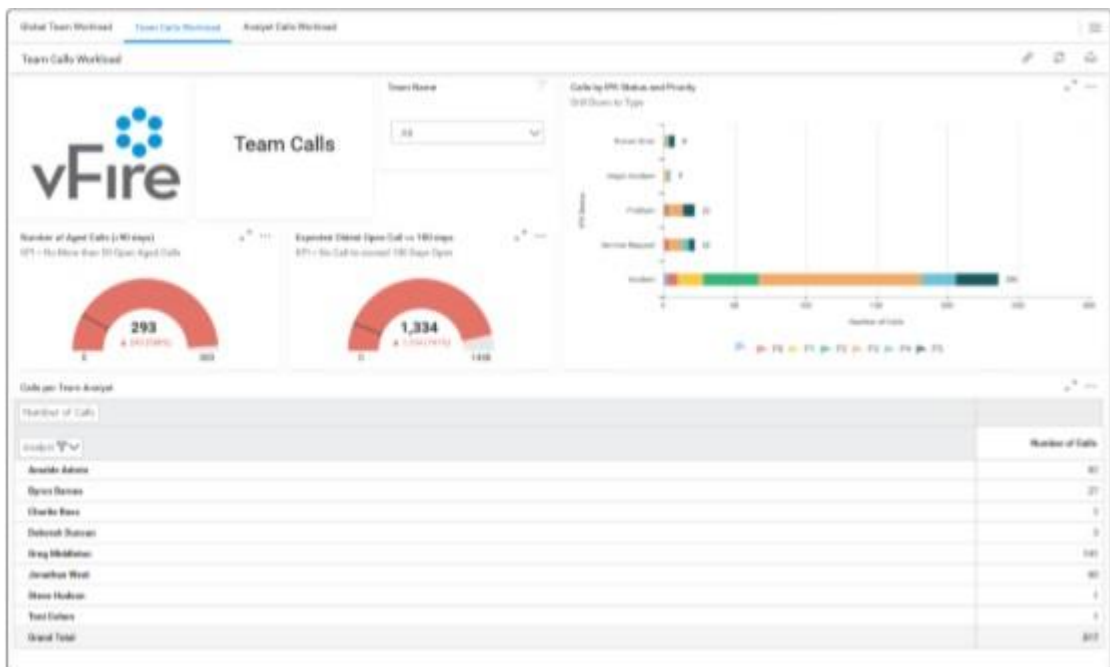
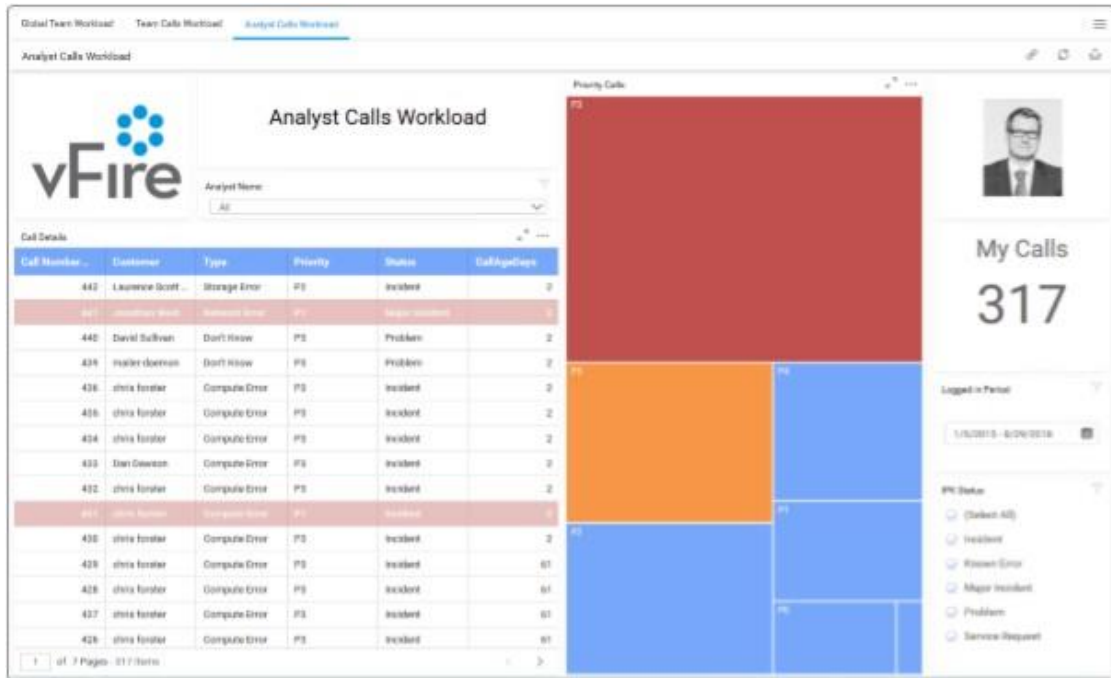# The Dashboard Layout

1. Global Team Dashboard
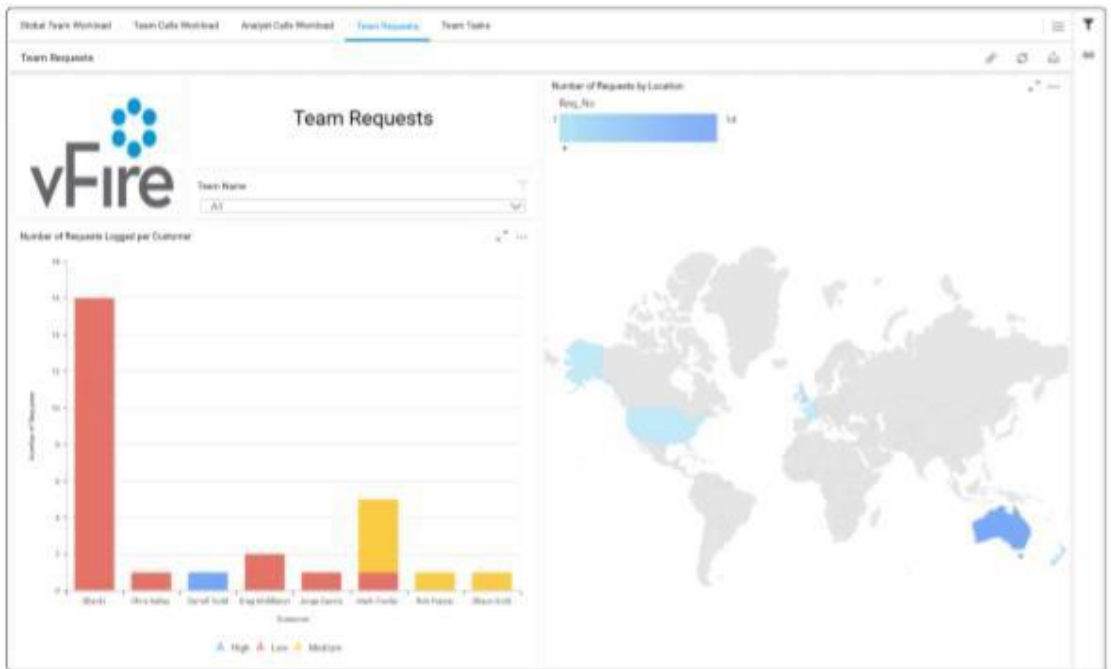

2. Team Calls Workload

3. Analyst Calls Workload

4. Team Requests

5. Team Tasks

Step by Step and Workshop Challenge Guidance

1. Items in **BOLD** are application related, either a button to press or an area of the application.

2. Items in *Italics* are Data related, either a SQL Table, View or Column (Field Name).

3. Items in quotations e.g. "Total Calls by Type" are labels or text that is required to enter into a widget or label.

Step by Step 1 - Creating the Global Team Workload Dashboard

This will produce the following initial first page in the Dashboard, we will return to this page in future Workshop Challenges to add additional widgets:
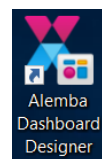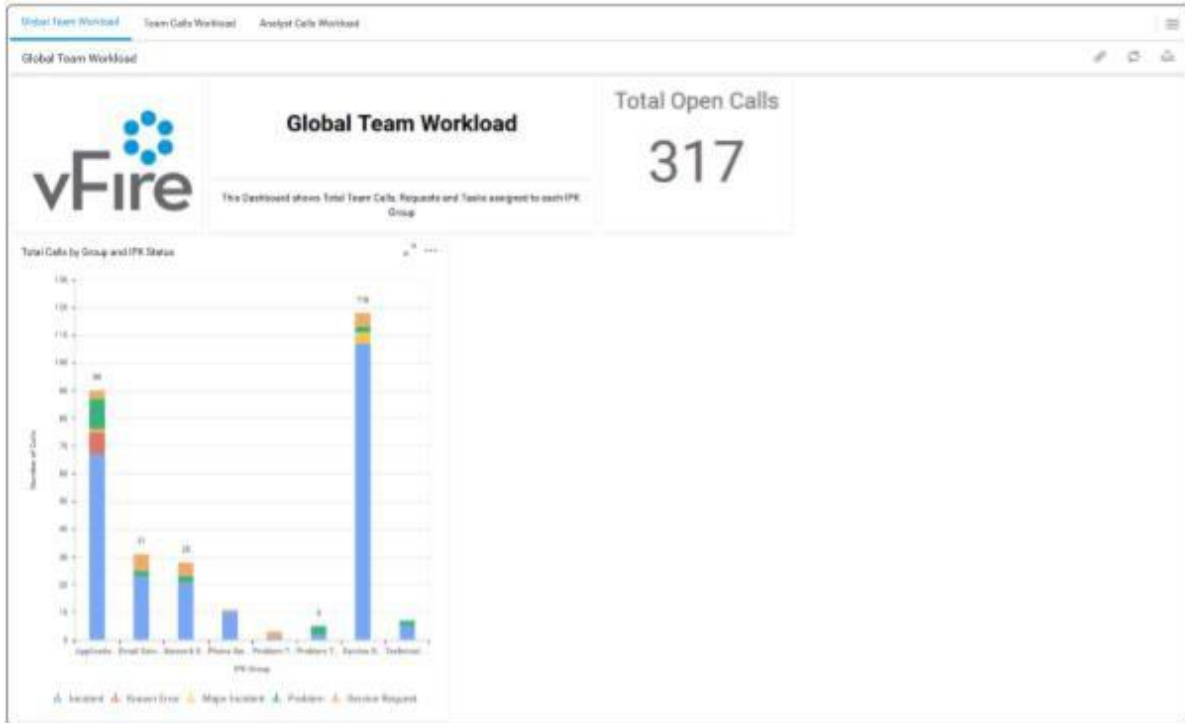
1. Launch the *Alemba Dashboard Designer*, using the icon on your desktop.

2. Rename the Dashboard to "Global Team Workload", as follows:

   - Click on the small pencil icon in the **Title** field in the top left-hand corner of the window.
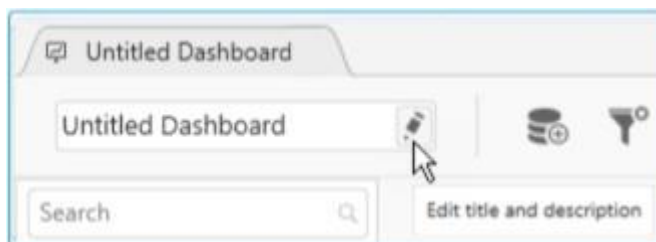
   - In the window, change the title to "Global Team Workload".

   - Click on **OK**. The name changes in the tab.

3. Add a Data Source, as follows:

- Click the **Add** icon in the **Data Sources** container.

If you do not see this, click on the icon in the toolbar

- Complete the details, as follows:

Data Source Name	Team Calls
Connection Type	Microsoft SQL Server
Server Name	localhost
Authentication Type	SQL Server Authentication
User name	DBUser
Password	A13mb4
Database	ASM

- Press **Connect** to establish a connection to the

  Database. The Data Source Design View is displayed:
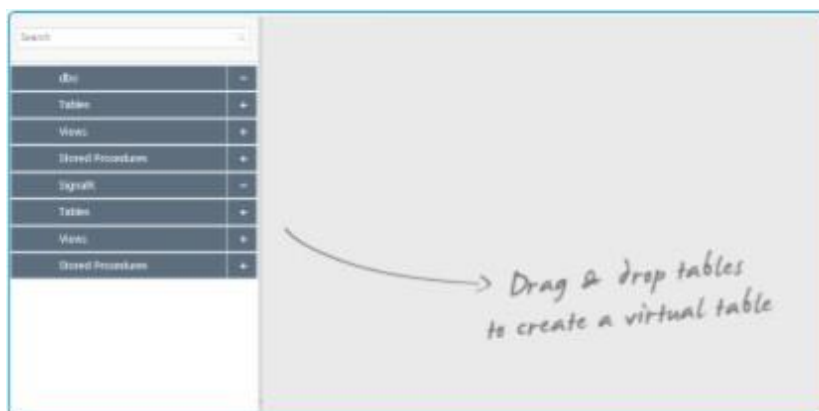
4. Create a virtual table showing all open calls, as follows:

- In the left-hand pane, expand the **Views** group if necessary, and locate *RV_CALL*. Alternatively, you can search for it in the Search box.

- Click and drag it into the work area to create a virtual table.
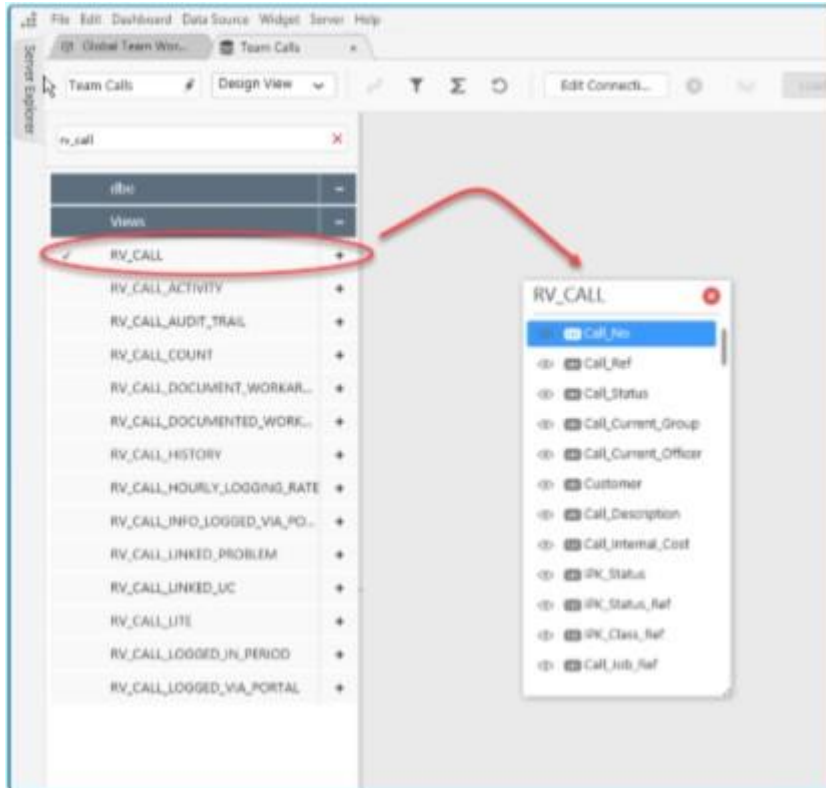
- Note the number of calls in the *Data Preview* section, beneath the work area.

- Locate the *IPK_Status* field and click on the Settings menu and **Rename Column** to be *IPK Status* (no underscore)

- To filter the calls to display only open ones, click on the filter icon in the Dashboard Config Menu.

- Click the **+ Add** button at the bottom of the window to add a new filter.

- Complete the details as shown below to display Call_Open_Flag Equals 1, before clicking **Update**.
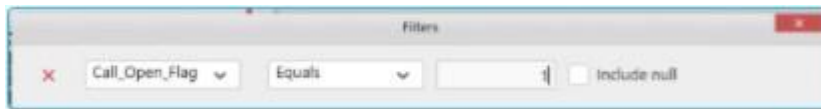
- Note that the number of calls has changed because you are only seeing the open calls.

5. Add a logo to the "Global Team Workload "tab, as follows:

- Scroll to the bottom of the Widget Palette and expand the **Miscellaneous** group if necessary.

- Click and drag the **Image** widget onto the top left-hand corner of the workspace area.

- Drag the edges to create a **4x3** square in the top left-hand corner.

- In the top left corner, change the heading to "AlembaLogo", and click on the **Assign Data** button.
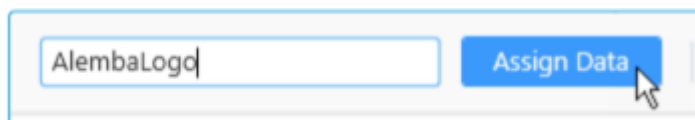
- On the **Properties** tab, Uncheck **Bind from Database**, change the **Mode** to **Uniform**, and click the **Set Image…** button to browse for the image file.

- Navigate to your desktop and select the *ASMX logo (dark text)200x44.png* file.
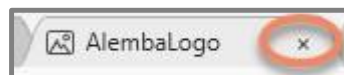
- Close the AlembaLogo tab.

6. Add a label to the "Global Team Workload", as follows:

- Select the **Label** widget from the **Miscellaneous** group in the Widget Palette.

- Click and drag it to the top row beside the logo.

- Drag the edges to create an **8x2** widget.

- Change the heading to "Title" and click on **Edit Label**.
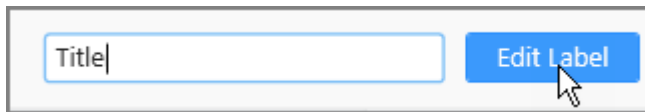
- In the window, key in "Global Team Workload" as the text, and format as shown, before clicking **Apply**.
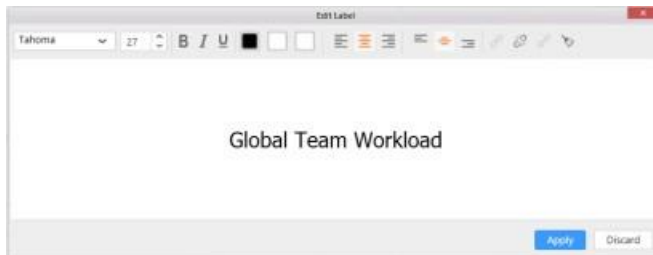
7. Add a Description beneath the label, as follows:

   - Select the **Label** widget from the **Miscellaneous** group in the Widget Palette.

   - Click and drag it to the row beside the label.

   - Drag the edges to create an **8x1** widget.

   - Change the heading to "Description" and click on **Edit Label**.
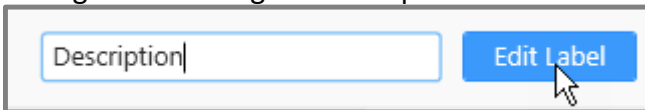
   - In the window, key in "*This dashboard provides real time data of the Calls, Requests and Tasks owned by each Team in the Service Desk*" as the description, and format as shown, before clicking **Apply**.
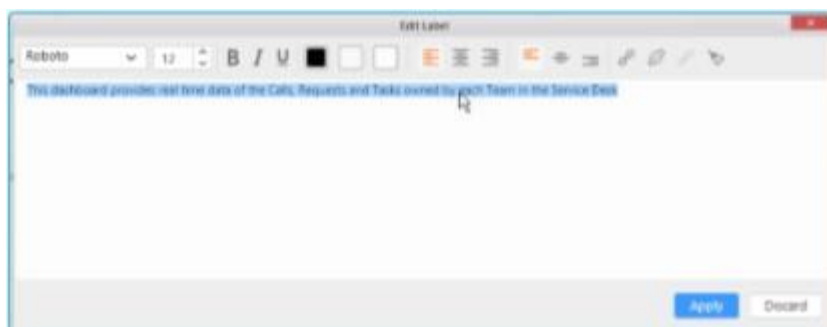
8. Save your dashboard to ensure that you do not lose your work (**File>Save As>**" Global Team Workload 01.sydx").

9. Add a "Total Open Calls" widget, as follows:

   - Select the **Card** widget from the **Deviation** group in the Widget Palette.

   - Click and drag it to the top row beside the label.

   - Drag the edges to create a **4x3** widget.

   - Change the heading to "Total Open Calls" and click on **Assign Data**.

- Select the **Data** tab if necessary. (It should be blue text).
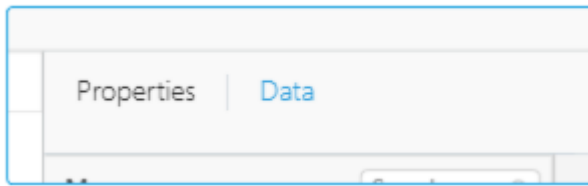
- Locate *Call_No* in the **Measures** section.

- Click and drag it into the **Actual Value** box.
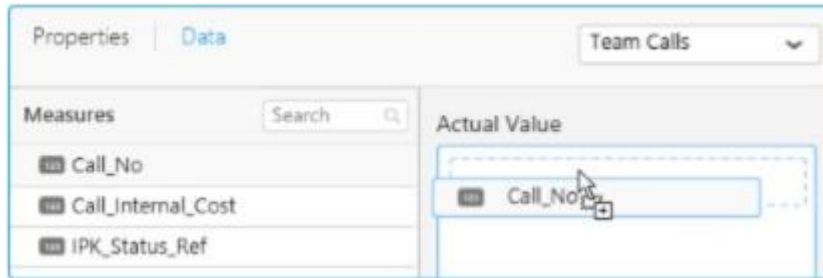
It is displayed as *Sum(Call_No)* by default.

- Click on the Settings button ⚙ in the *Sum(Call_No)*, and:

  - Select **Distinct Count** from the drop-down menu.

  - Choose **Format** at the bottom of the Settings menu, and change **Representation** to "Ones", and set **Decimal Places** to 0, if necessary, before clicking OK.
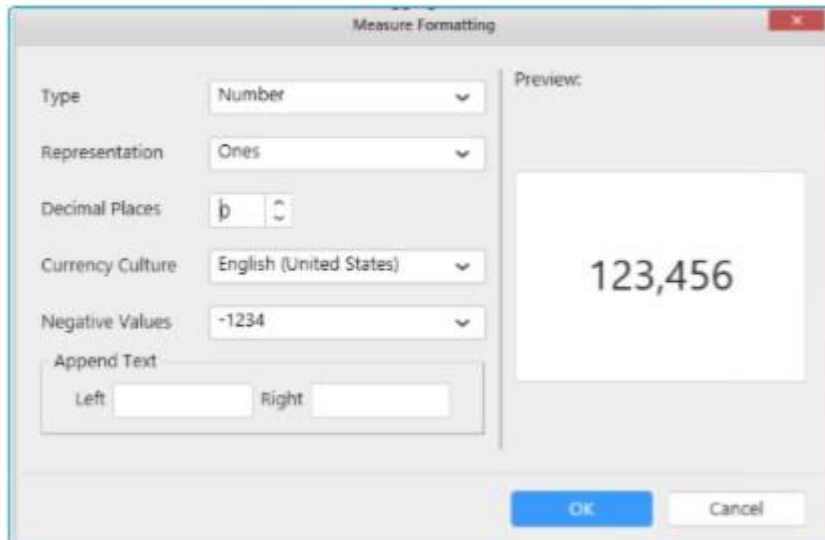
- Select the **Properties** tab and, in **Basic Settings**, change the **Title Alignment** to Center.

- Close the *Total Open Calls* widget tab.

10. Save your work (**File>Save As>**" Global Team Workload 02.sydx").

11. Add a Stacked Column chart showing Calls by Group and IPK Status, as follows:

- Select the **Stacked Column** widget from the **Comparison** group in the Widget Palette.

- Click and drag it to the row beneath the logo.

- Drag the edges to create a **9x9** widget.

- Change the heading to "Total Calls by Group and IPK Status" and click on **Assign Data**.
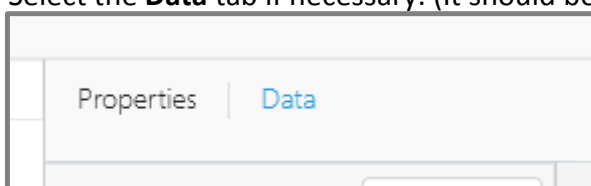
- Select the **Data** tab if necessary. (It should be blue text).

- Locate *Call_No* in the **Measures** section.

- Click and drag it into the **Value(s)** box. It is displayed as *Sum(Call_No)*.

- Click on the **Settings** button ⚙ in the *Sum(Call_No)*, and select **Distinct Count** from the drop down menu.

- In the **Dimensions** section, locate *Call_Current_Group*.

- Drag it into the **Column(s)** box.

- In the **Dimensions** section, locate *IPK Status*.

- Drag it into the **Row** box.

- Click on the **Settings** button ⚙ in the *IPK Status* and select **Filter(s)** from the drop down menu.

- In the **List** dropdown field ensure only Incident, Problem, Major Incident, Known Error and Service Request statuses are selected.

- Change the legend to be more readable, as follows:

  - on the **Properties** tab, in the **Basic Settings** section, click on the **Custom...** button.

 - Select **Group** and edit the **Display Format** (if necessary) to ensure that only the row is displayed. You can either edit the text or delete the existing text and double click on Row in the box beneath the field, before clicking on OK.
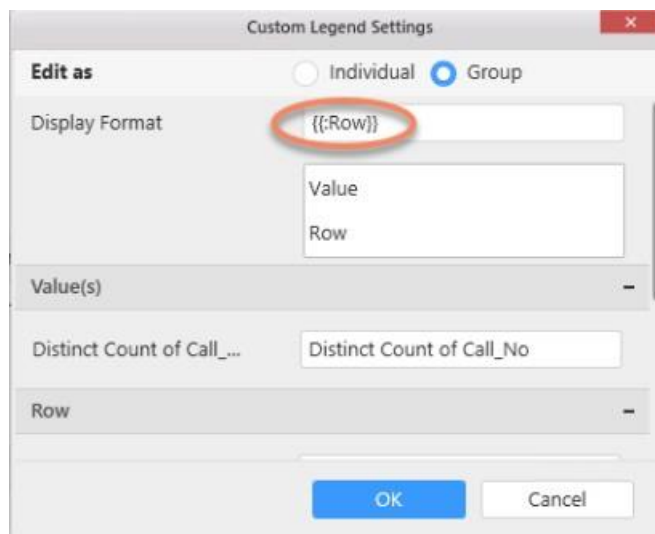
- Assign the axis properties, as follows:

  - Scroll down to the Axis section, and change the:

    - **Category Axis Title** to "IPK Group".

    - **Primary Value Axis Title** to "Number of Calls".

- Change the display order, so that it is in descending alphabetical order, as follows:

  - In the **Column(s)** box, click on the **Settings** button for *Call_Current_Group*, and select **Custom Sort...**
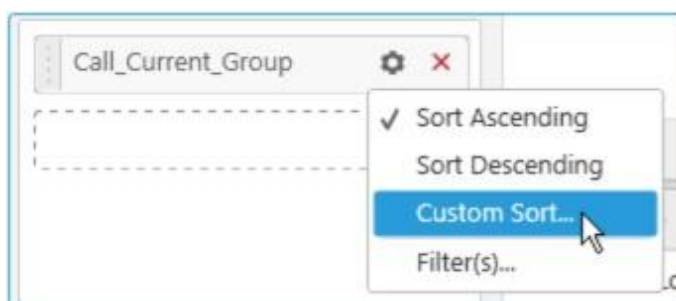
- In the Advanced Sorting Options window, select **Sort By Alphabetic**, and **Sort Order Descending**, and click on **Apply**.
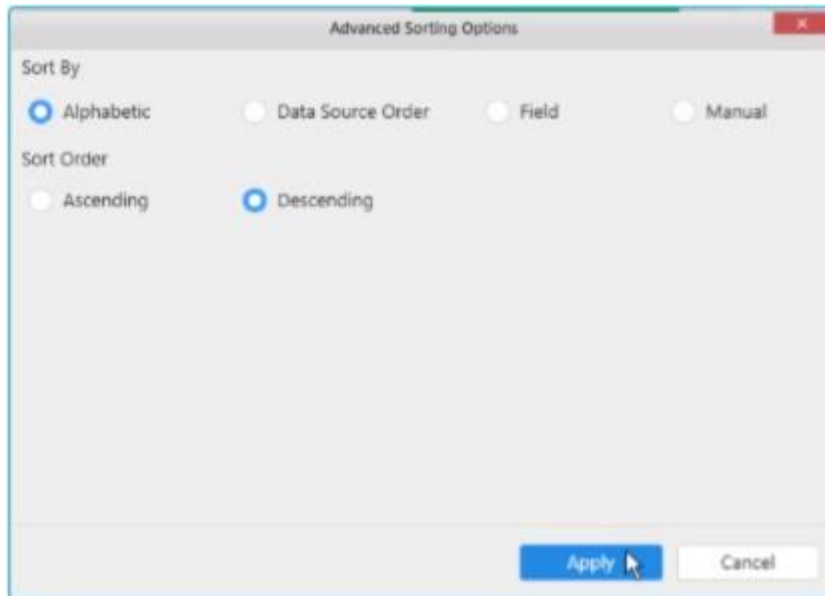
12. Add Counts to each column by checking the **Show Value Labels** option in the **Basic Settings** section and toggling the **Total** option.

13. Save your work (**File>Save As>**" Global Team Workload 03.sydx").

14. Click on **Preview** in the top right-hand corner of the screen to see a user view of your dashboard.

Step by Step 2 - Creating the Team Calls Workload Dashboard

This will produce the next page in the Dashboard that should resemble the following, although the actual figures shown may differ:
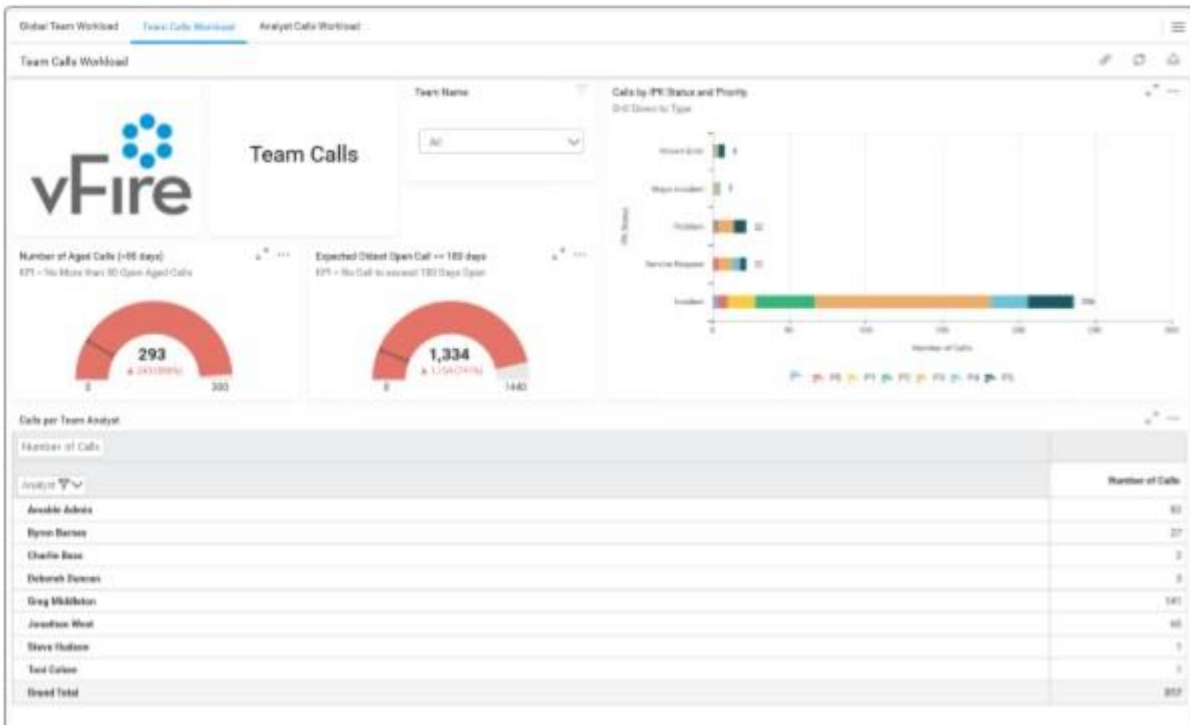
1. If it is not already on screen, launch the *Alemba Dashboard Designer*, using the icon on your desktop.

2. Open your saved dashboard if necessary, by clicking on **Open Dashboard...**, or **Recent Dashboards**.

3. In the menu, click on **Dashboard**, and then **Add Dashboard**.
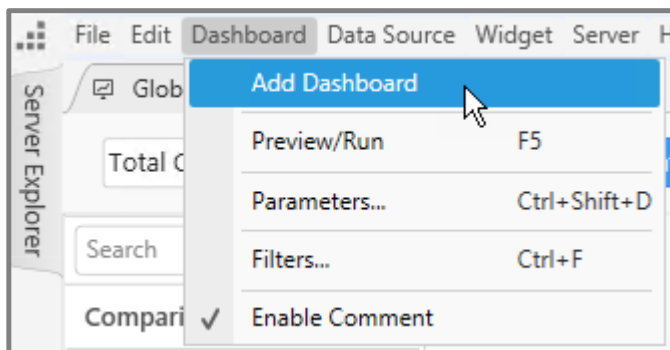
4. In the **Title** field in the top left-hand corner, change the name to "Team Calls Workload".

5. Add a logo widget in a **4x3** grid, as described in the earlier exercise, or you can reuse the **AlembaLogo** widget from the Widgets container on the right-hand side of the screen by dragging it onto the Workspace Grid.
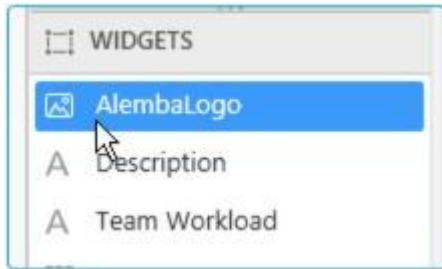
6. Add a Label widget in a **4x3** grid, to the right of the logo, which will contain the title for the dashboard, as described in the earlier exercise. Give the widget the title "Team Calls".

7. Save your dashboard (**File>Save As>**" Global Team Workload 04.sydx").

8. Add a Team Name widget, as follows:

   - Expand the **Filters** group in the Widgets Palette if necessary and select the **ComboBox** widget.

   - Click and drag it to the right of the dashboard label widget. Then adjust the size to create a **4x2** rectangle.
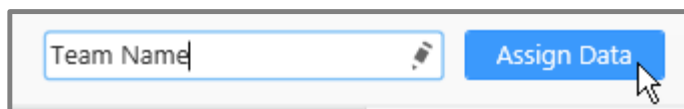
   - Change the title to "Team Name" and click on **Assign Data**.

   - On the **Data** tab, drag *Call_Current_Group* from the **Dimensions** section into the **Display Column**.

   - Close the *Team Name* Filter Widget tab.

9. Save your work (**File>Save As>**" Global Team Workload 04.sydx").

10. Add a Calls by IPK Status and Priority Stacked Bar Chart, as follows:
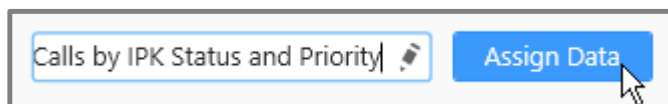
   - Expand the **Comparison** group in the Widgets Palette if necessary and select the **Stacked Bar** widget.

   - Click and drag it to the right of the Team name. Then adjust the size to create a **12x6** widget.

   - Change the title to "Calls by IPK Status and Priority "and click on **Assign Data**.

   - On the **Data** tab, drag *Call_No* from the **Measures** section to the **Value(s)** box. Click on the **Settings** button ⚙ in the *Sum(Call_No)* entry and select **Distinct Count**.

- Drag *IPK Status* from the **Dimensions** section to the **Columns** box.

- Click on the **Settings** button ⚙ for the *IPK Status* entry and choose **Filter(s)**

- Select the **List** dropdown and deselect all checkboxes apart from Incident, Problem, Known Error, Major Incident and Service Request, before clicking **Apply**, then press **OK**:
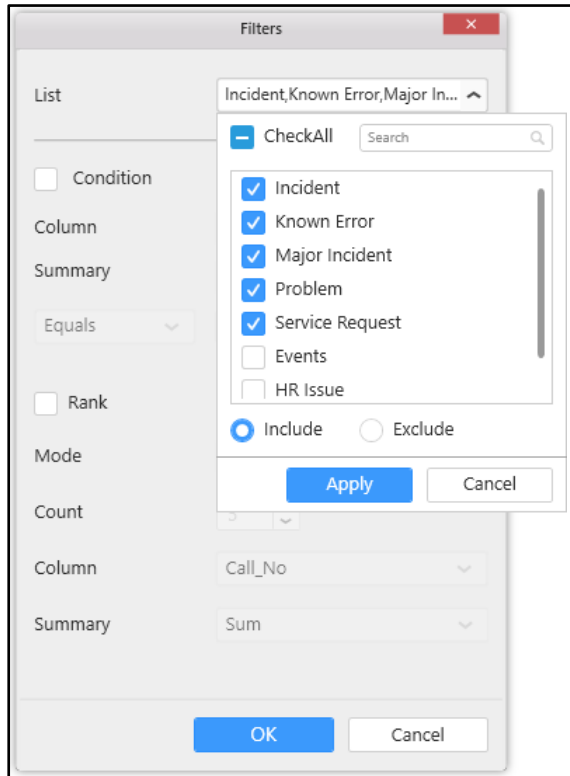
- Drag *Call_Priority* from the **Dimensions** section to the **Row(s)** box.

  You can search for *Call_Priority* by keying some of the characters into the Search box to the right of the Dimensions section title if you wish.

- Click on the **Settings** button ⚙ for the *Call_Priority* entry and choose **Custom Sort...**

- Select **Manual Option** and drag the priorities to match the following display, before clicking **Apply**:
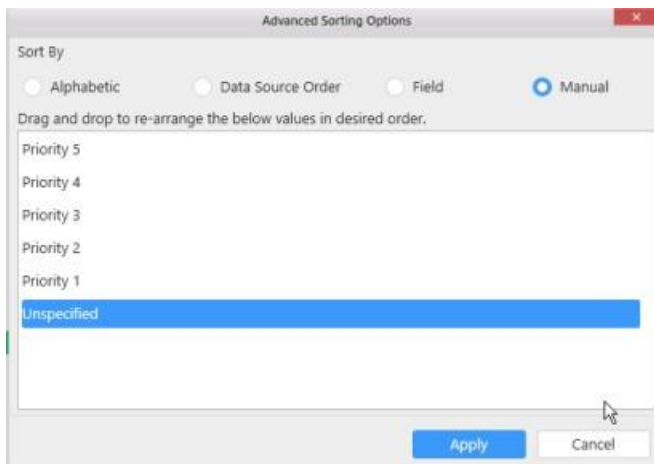
- Drag *Problem_Type_Composite* from the **Dimensions** section to the **Column(s)** box, clicking **Yes** when prompted to enable Multi-Level drill down.

- On the **Properties** Tab:

  - Add a **SubHeading** to say, "Drill Down to Type".

  - In **Basic Settings**, Select the **Custom…** button next to **Show Legend**, select **Group**, and ensure only the **Row** is displayed, as shown, before clicking **OK**:
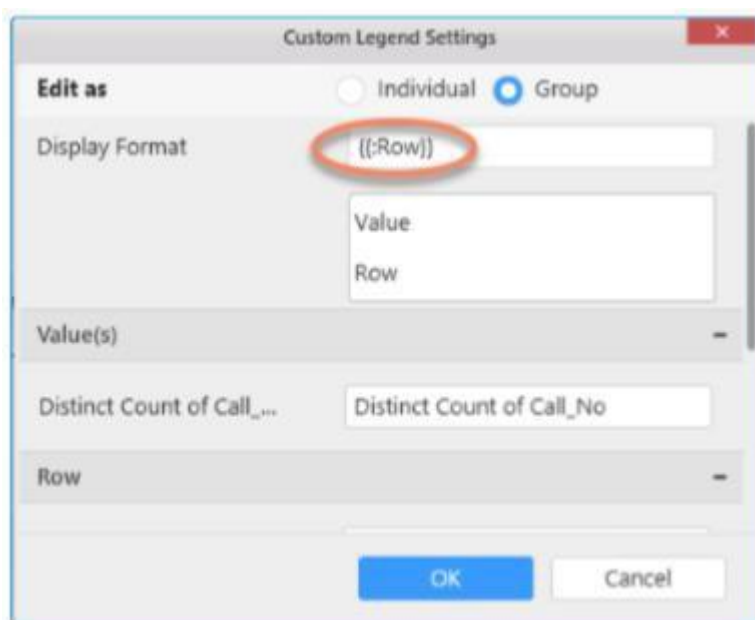
  - Select the **Show Value Labels** and toggle the **Total** option.

  - Scroll down to **Axis**, set the **Label Overflow Mode** to **Hide**, and change the **Primary Value Axis Title** to "Number of Calls".

  - Close the Calls by IPK Status and Priority Stacked Bar Chart widget tab

11. Save your work (**File>Save As>**" Global Team Workload 05.sydx").

12. Add a Number of Aged Calls Gauge Widget as follows:

- Expand the **Deviation** group in the Widgets Palette if necessary and select the **Radial Gauge** widget.

- Click and drag it to beneath the logo widget. Then adjust the size to create a **6x3** widget.

- Change the title to "Number of Aged Calls (>90 days)" and click on the **Assign Data** button.
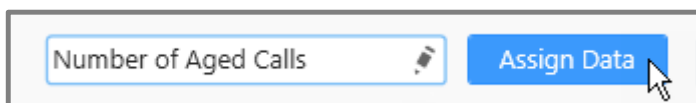
- Create the four expressions, as follows:

    - On the **Data** tab, click the Add button in the **Expression Columns** section to open the Expression Designer

    - Create an expression for the age of calls in days, as follows:

        - In the Expression Designer, click the **Add** button.
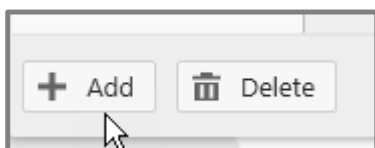
        - Complete the details as follows:

Name	CallAgeDays
Expression	`DAYDIFF([Call_Log_Date],TODAY())`

        - Click **Save** to save the expression.

    - Create an expression for calls older than 90 days by clicking the **Add** button, and completing the details as follows, saving when you are finished:

Name	CallsOlder90
Expression	`IF([CallAgeDays]>90,1,0)`

    - Create an expression for the average call age target by clicking the **Add** button, and completing the details as follow, saving when you are finished:

Name	AvgCallAgeTarget
Expression	50

- Create an expression for the expected oldest call age by clicking the **Add** button, and completing the details as follows, saving when you are finished:

Name	ExpOldestCallAge
Expression	180

- With all of the expressions saved, **Close** the Expression Designer.

- Drag the *CallsOlder90* Expression to the **Actual Value** box. In the Settings menu:

    - Ensure that **Sum** is selected

    - Select the **Format** option, and in the **Measure Formatting** window, set the **Representation** to "Ones" and the **Decimal Places** to **0**.

- Drag the *AvgCallAgeTarget* from the **Expression Columns** section to the **Target Value** box. Click on the **Settings** button ⚙ in the *Sum(AvgCallAgeTarget)* entry and select **Average**.

- On **Properties** Tab:

    - Change **SubHeading** to say "KPI =No more than 50 Open Aged Calls".

    - Change the Range Colour to **Red**

    - Set **Custom Range Minimum = 0**

    - Set **Custom Range Maximum=300**

    - Set **Direction** to **Low is Good**

- Close the Number of Aged Calls (>90 days) widget.

11. Save your work (**File>Save As>**" Global Team Workload 06.sydx").

12. Add a widget that shows the Expected Oldest Open Call, as follows:

- Expand the **Deviation** group in the Widgets Palette if necessary and select the **Radial Gauge** widget.

- Click and drag it to beside the Number of Aged Calls (>90days) widget. Then adjust the size to create a **6x3** widget.

- Change the title to "Expected Oldest Open Call >=180 days" and click on the **Assign Data** button.

- On the **Data** Tab:

    - Drag the *CallsAgeDays* Expression to the **Actual Value**. In the **Settings** menu:

        - Select **Max**.

        - Select **Format** and ensure that the **Representation** is "Ones" and **Decimal Places** is **0**.

- Drag the *ExpOldestCallAge* Expression to the **Target Value**. In the **Settings** menu:
    - Select **Average**.
- On the **Properties** tab:
    - Add a **SubHeading** to say "KPI=No Call to exceed 180 Days Open".
    - Change the **Range Colour** to **Red**
    - Set **Direction** to **Low is Good**
- Close the Number of Aged Calls widget.

13. Save your work (**File>Save As>**" Global Team Workload 07.sydx").

14. Add a Pivot Grid that shows Calls per Team Analyst.

    - Expand the **Relationship** group in the Widgets Palette if necessary and select the **PivotGrid** widget.

    - Click and drag it to beneath the Number of Aged Calls widget. Then adjust the size to create a **24x6** widget that extends across the dashboard.

    - Change the title to "Calls per Team Analyst" and click on the **Assign Data** button.

    - On the **Data** tab:
        - Locate *Call_No* in the **Measures** section and drag it to the **Value(s)**
            - In the **Settings** menu:
                - Select **Distinct Count**
                - Choose **Format** and change **Representation** to "Ones" (if necessary) and set **Decimal Places** to 0.
        - Locate *CallAgeDays* in the **Expression Columns** section, and drag it to **Value(s)**
            - In the **Settings** menu:
            - Select **Average**
            - Choose **Format** and change **Representation** to "Ones" (if necessary) and set **Decimal Places** to 0.
        - Locate *CallsOlder90* in the Expression Columns section, and drag it to **Value(s)**
            - In the **Settings** menu:
            - Select **Distinct Count**
            - Choose **Format** and change **Representation** to "Ones" (if necessary) and set **Decimal Places** to 0.

- Locate *Call_Current_Officer* in the **Dimensions** section, and drag it to the Row(s)

- On the **Properties** tab:

    - Under **Column Settings**, click on **Edit Column Names**, and update the details as follows, before clicking **OK**:

    - Close the Pivot Grid widget.

15. Save your work (**File>Save As>**" Global Team Workload 08.sydx").

16. Preview your dashboard, by clicking on the **Preview** button in the top right corner of the screen.

Step by Step 3 - Linking the Dashboard Pages

In this exercise, we will link the Global Team Workload page and the Team Calls Workload dashboard page.

1. If it is not already on screen, launch the *Alemba Dashboard Designer*, using the icon on your desktop.

2. Open the Global Team Workload dashboard. You can use **File>Open** or select it from the pane on the right hand side of the screen.

3. Select the Total Calls by Group and IPK Status Stacked Column Chart.

4. Click on **Assign Data**, and display the **Properties** tab.

5. Under the **Link** menu item, do the following:

   - Enable **Linking**

   - Select **Internal**

   - Choose the "Team Calls Workload" dashboard in the Tab dropdown.

   - Select **Set Parameters** and complete the details as follows, before clicking **OK**:

     - Target Column = "Call_Current_Group"

     - Source Widget = "Total Calls by Group and IPK Status"

     - Source Column = "Call_Current_Group"

6. Return to the Global Team Workload Dashboard and click **Preview** to preview the dashboard.

7. Click on one of the columns in the Total Calls by Group and IPK Status bar chart on the Global Team Workload page to view calls for a specific team. You should see the Team Calls page display, with the relevant team name (and linked chart widgets) selected.

Step by Step 4 - Creating the Analyst Calls Dashboard

This will create the following new dashboard page:
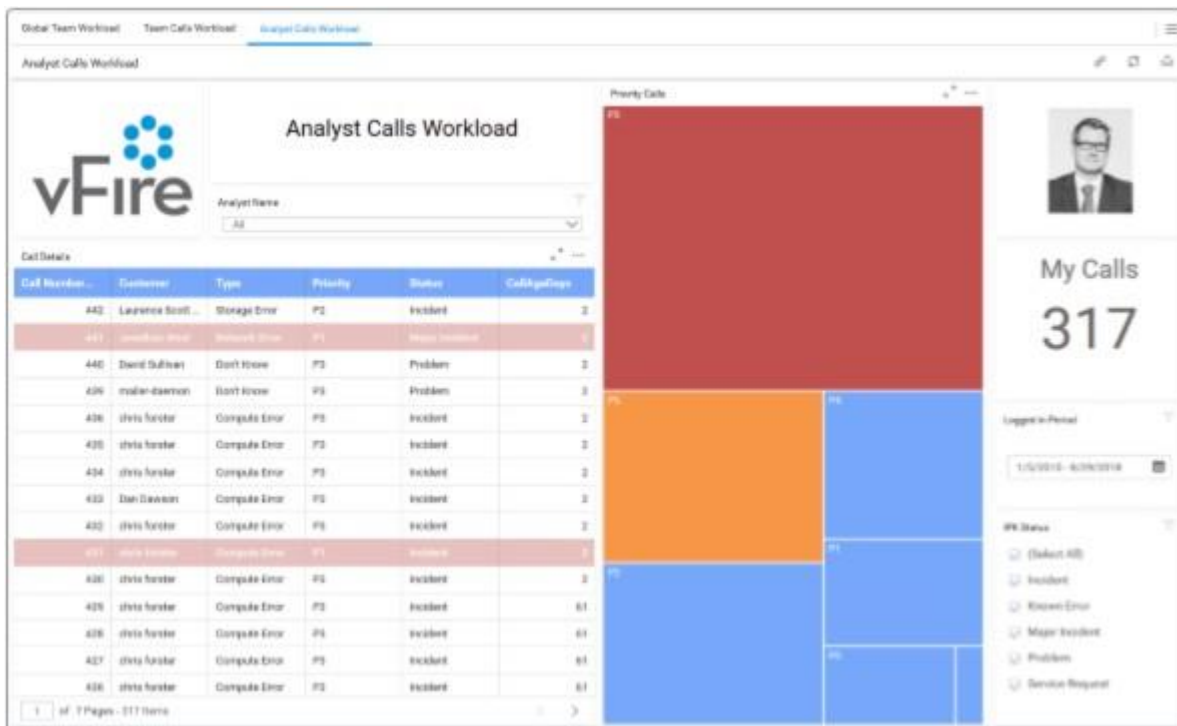
1. If it is not already on screen, launch the *Alemba Dashboard Designer*, using the icon on your desktop.

2. Open your dashboard if necessary, by clicking on **Open Dashboard...**, or **Recent Dashboards**.
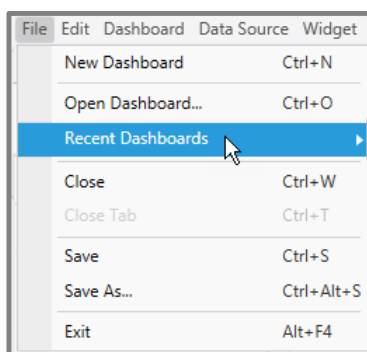
1. Add a new tab to the Dashboard to build the Analyst Calls widgets, as follows:

    -   Select the **Add** button in the **Dashboards** Container.

    -   Rename the Tab to "Analyst Calls Workload".

2. Add the logo to the dashboard, as you have done in previous exercises, as follows:

    -   Scroll to the bottom of the Widget Palette and expand the **Miscellaneous** group if necessary.

- Click and drag the **Image** widget onto the top left-hand corner of the workspace area.

- Drag the edges to create a **4x3** square in the top left-hand corner.

- In the top left corner, change the heading to "AlembaLogo", and click on **Assign Data**.
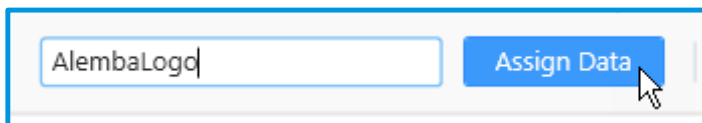
- On the **Properties** tab, uncheck **Bind from Database**, change the **Mode** to **Uniform**, and click the **Set Image…** button to browse for the image file.

- Navigate to your desktop and select the *ASMX logo (dark text)200x44.png* file.

- Close the AlembaLogo tab.

3. Click to select the Analyst Calls Workload tab if necessary.

4. Add a label to the dashboard.

- Select the **Label** widget from the **Miscellaneous** group in the Widget Palette.

- Click and drag it to the top row beside the logo.

- Drag the edges to create an **8x2** widget.

- Change to heading to "Analyst Calls Workload " and click on **Edit Label**.
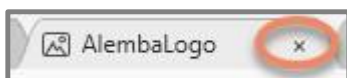
- Enter "Analyst Calls Workload" as the text, and format as shown, before clicking on **Apply**.
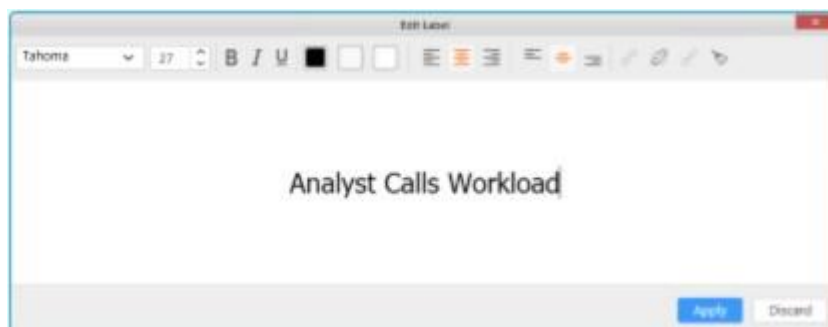
5. Add an Analyst Name Filter Widget, as follows:

- Expand the **Filters** group in the Widgets Palette, if necessary, and select the **ComboBox** widget.

- Click and drag it to the right of the label. Then adjust the size to create an **8x1** rectangle.

- Change the title to "Analyst Name" and click on **Assign Data**.

- On the **Data** tab, drag *Call_Current_Officer* from the **Dimensions** section into the **Display Column**.

- Close the tab (click to select the Analyst Calls Workload tab if necessary).

6. Save your work (**File>Save As>**" Global Team Workload 09.sydx")

7. Add a Grid Widget to display the Analysts Calls, as follows:

- Scroll to the **Relationship** group of the Widget Palette.

- Click and drag the **Grid** widget onto the left-hand corner of the workspace area, below the Image and the Label.

- Drag the edges to create a **12x9** square.

- In the top left corner, change the heading to "Call Details", and click on **Assign Data**.

- On the **Data** Tab:

    - Locate *Call_No* in the **Measures** section and drag it to the **Column(s)**

        - In the **Settings** menu:

            - Select **None**

            - Choose **Format** and change **Representation** to "Ones" (if necessary) and set **Decimal Places** to 0.

    - Drag the following from the **Dimension(s)** section to the **Column(s)** section. (You can use the Search button or scroll up and down.)

        - *Customer*

        - *Problem_Type_Composite*

        - *Call_Priority*

        - *IPK Status*

    - Locate *CallAgeDays* in the **Expression Columns** section, and drag it to **Value(s)**

        - In the **Settings** menu:

            - Select **None**

            - Choose **Format** and change **Representation** to "Ones" (if necessary) and set **Decimal Places** to 0.

- On the **Properties** Tab:

  - Under **Column Settings**, press the **Edit Column Names** button and update the column titles:
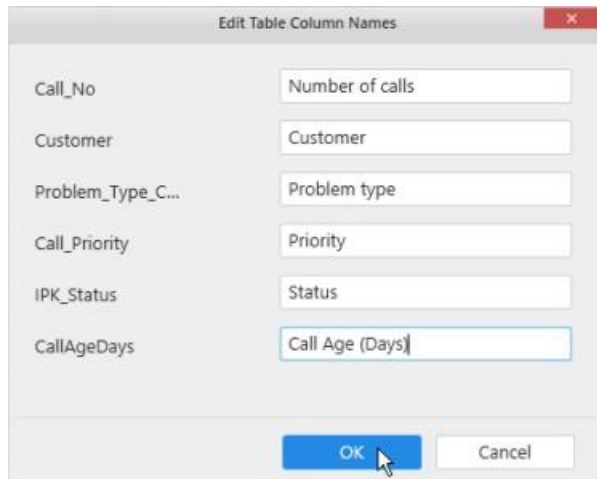
  - Under **Column Settings** select **Template**.

  - Select *CallAgeDays* Column and select **Conditional Formatting**, press **Edit...**

  - Press the **Add** Button (+)

  - Select *CallAgeDays*, and set the details as shown: Condition Type **Greater than or Equal To**, Values= **90** Font Color to **Red** and Background to **White**.
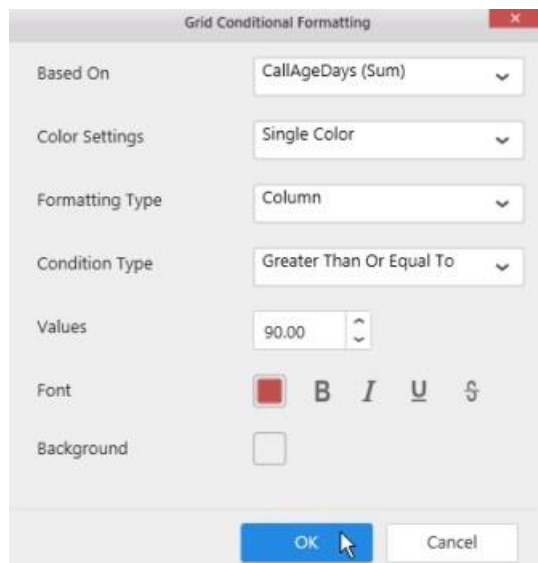
  - Press **OK** and **Close**.

  - Select *Call_Priority* Column and select **Conditional Formatting**, press **Edit...**

- Press the **Add** Button

- Change the details, as shown.
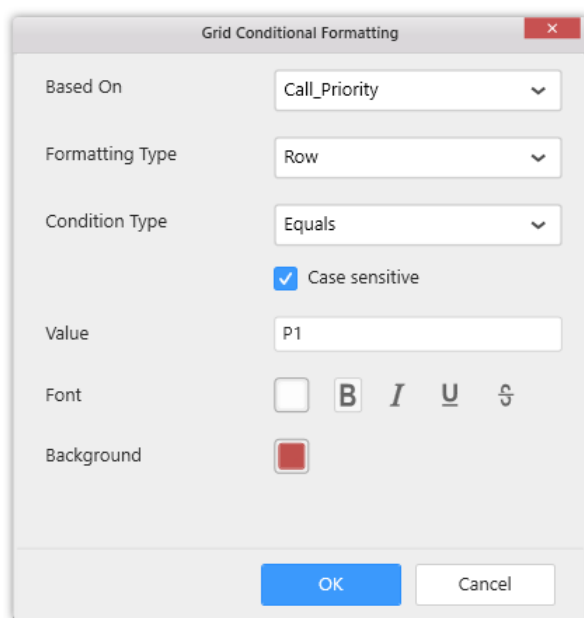
- Press **OK**, **Close** and **Update**.

- In the **Column Settings** section of the **Properties** tab click on **Sort...**

  - Set **Sort Order** to **Descending**

  - Set **Value(s)** to **Call_No (None)**

  - Press **OK**.

- Ensure **Allow Paging** is selected in the **Basic Settings**.

- Close the Call Details Grid tab.

- Save your work (**File>Save As>**" Global Team Workload 10.sydx")

8. Add a TreeMap Widget to show priority calls.

- Expand the **Relationships** group in the Widgets Palette, if necessary, and select the **TreeMap** widget.

- Click and drag it to next to the Analyst Name Filter. Then adjust the size to create **8x15** rectangle.

- Change the title to "Priority Calls" and click on **Assign Data**.

- On the **Data** tab, drag *Call_No* from the **Measures** section into the **Value(s)** column.

  - In the **Settings** menu:

    - Select **Distinct Count**

    - Choose **Format** and change **Representation** to "Ones" (if necessary) and set **Decimal Places** to 0.

  - Drag *Call_Priority* from the **Dimensions** section to the **Group By** Section.

- On the **Properties** Tab, scroll to the **Range Colour Settings**, select **Range Brush Items** and set Low to Blue, Medium to Yellow/Orange and High to Red.

- Close the tab.

9.   Save your work (**File>Save As>**" Global Team Workload 11.sydx").

10.   Add a picture of the analyst, as follows:

- Open the "Team Calls" Data Source.

  - Locate the *Call_Current_Officer_Ref* field and click on the **Settings** menu and change the **Column Type** to **Text**. This will allow you to pass the correct value for the Analyst from the ASM database into the linked image URL to retrieve the Analysts Image.

- Add an **Image** widget to the top right hand of the Analyst Calls dashboard page.

- Drag the edges to form a **4x3** square.

- Change the heading to "Analyst Photo', and click on **Assign Data**.

- On the **Data** Tab drag the *Call_Current_Officer_Ref* to the **Column(s)**.

- On the **Properties** Tab:

  - Change the **Mode** to **Default**.

  - Change the **Image Source** to **URI**.

  - Change the **Pattern** to point to the location of the image files, note {0} variable E.G. http://localhost/ASM/dashboards/{0}.*jpg*

  - Close the tab.

9.   Add a Card Widget that shows the total number of calls.

- Expand the **Deviations** group in the Widgets Palette, if necessary, and select the **Card** widget.

- Click and drag it to below the Analyst Picture Image, and then adjust the size to create a **3x4** rectangle.

- Change the title to "Total Open Calls" and click on **Assign Data**.

- On the **Data** tab, drag *Call_No* from the **Dimensions** section into the **Actual Value**.

  - In the **Settings** menu:

    - Select **Distinct Count**

    - Choose **Format** and change **Representation** to "Ones" (if necessary) and set **Decimal Places** to 0.

- Close the tab.

10.   Add a Date Filter.

- Expand the **Filters** group in the Widgets Palette, if necessary, and select the **Date Picker** widget.

- Click and drag it to below the Card Widget. Then adjust the size to create a **2x4** rectangle.

- Change the title to "Logged in Period" and click on **Assign Data**.

- On the **Data** tab, drag *Call_Log_Date* from the **Dimensions** section into the **Column**.

- On the **Properties** tab, under **Basic Settings** set **Selection Type** to **Range**.

- Close the tab.

11. Add a Checkbox Filter

- Expand the **Filters** group in the Widgets Palette, if necessary, and select the **CheckBox** widget.

- Click and drag it to below the Date Filter. Then adjust the size to create a **4x4** rectangle.

- Change the title to "IPK Status" and click on **Assign Data**.

- On the **Data** tab, drag *IPK Status* from the **Dimensions** section into the **Column**.

- Close the tab.

12. Save your work (**File>Save As>**" Global Team Workload 12.sydx")

13. Preview the Dashboard.

Step by Step 5 - Linking the Team Calls Workload Dashboard to the Analyst Calls Workload Dashboard

In this exercise, we will link the Call Teams Workload page and the Analyst Calls Workload dashboard page.

1. If it is not already on screen, launch the *Alemba Dashboard Designer*, using the icon on your desktop.

2. Open the Team Calls Workload dashboard.

3. Select the Calls per Team Analyst Pivot Grid Widget.

4. Click on **Assign Data** and display the **Properties** Tab.

5. Under **Link**, select **Enable Linking**.

6. Select Internal.

7. Choose the "Analyst Calls Workload" dashboard in the Tab dropdown.

8. Select **Set Parameters** and complete the details as follows, before clicking **OK**:

   - Target Column = "Call_Current_Officer"

   - Source Widget = "Calls per Team Analyst"

   - Source Column = "Call_Current_Officer"

8. Return to the Team Calls Dashboard and click **Preview** to preview the dashboard.

9. Click on one of the columns in the Total Calls by Group and IPK Status bar chart to view calls for a specific team. You should see the Team Calls tab with the relevant team name (and linked Chart Widgets) selected.

10. Click on one of the analysts' names in the Calls per Team Analyst chart to view calls for that Analyst. You should see the Analyst Calls Workload Dashboard Tab filtered for that Analyst and displaying their photograph.

Workshop Challenge 1- Creating a New Data Source for Requests

This challenge will create a new Data Source to use with additional Widgets added to the Global Team Workload dashboard page (Workshop Challenge 2) and to the new Team Requests dashboard page (Workshop Challenge 3).

1. If it is not already on screen, launch the *Alemba Dashboard Designer*, using the icon on your desktop.

2. Go to **File>Open** to load the Global Team Workload Dashboard.

3. Add a Data Source, as follows:

    - Click the **Add** icon in the **Data Sources** container.

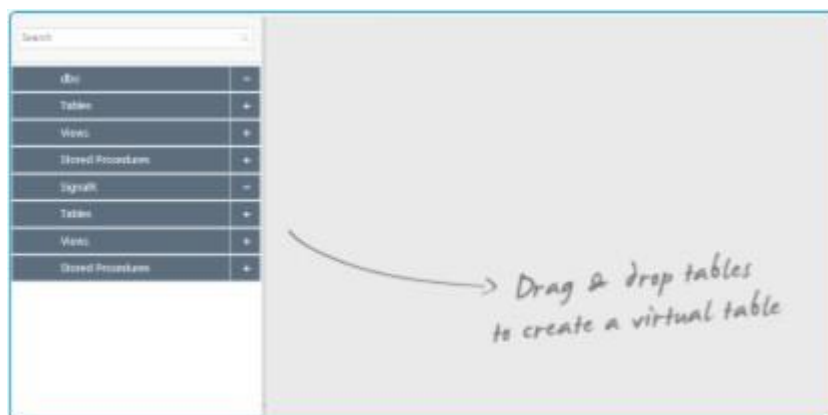   If you do not see this, click on the icon in the toolbar

    - Complete the details, as follows:

Data Source Name	Team Requests
Connection Type	Microsoft SQL Server
Server Name	<ServerName>
Authentication Type	SQL Server Authentication
User name	DBUser
Password	A13mb4
Database	ASM

    - Press **Connect** to establish a connection to the Database.
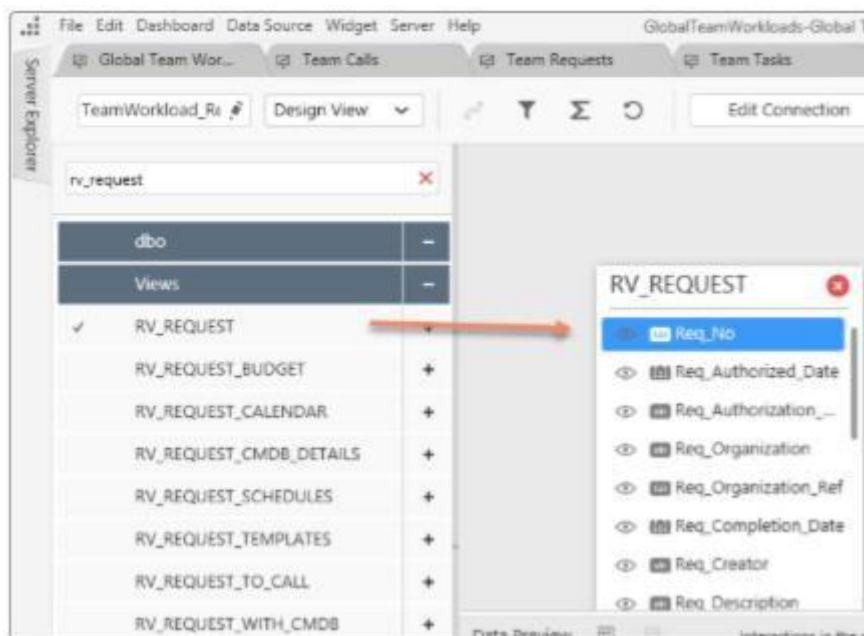
The Data Source Design View is displayed:

4. Create a virtual table showing all open requests, as follows:

- In the left-hand pane, expand the **Views** group if necessary, and locate **RV_REQUEST**. Alternatively, you can search for it in the Search box.

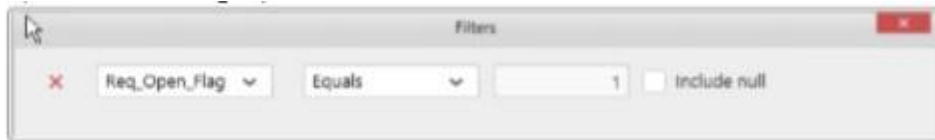- Click and drag it into the work area to create a virtual table.

- Note the number of Requests.

- To filter the Requests to display only open ones, click on the **Filter** button in the toolbar.

- Click the **+ Add** button at the bottom of the window to add a new filter.

- Complete the details as shown below to display **Req_Open_Flag Equals 1**, before clicking **Update**.

- Note that the number of Requests has changed because you are only seeing the open requests.

2. Next add another View and merge the data as follows:

   - In the left-hand pane, expand the **Views** group if necessary, and locate **RV_LOCATIONS**. Alternatively, you can search for it in the Search box.

   - Click and drag it into the work area to create a virtual table:
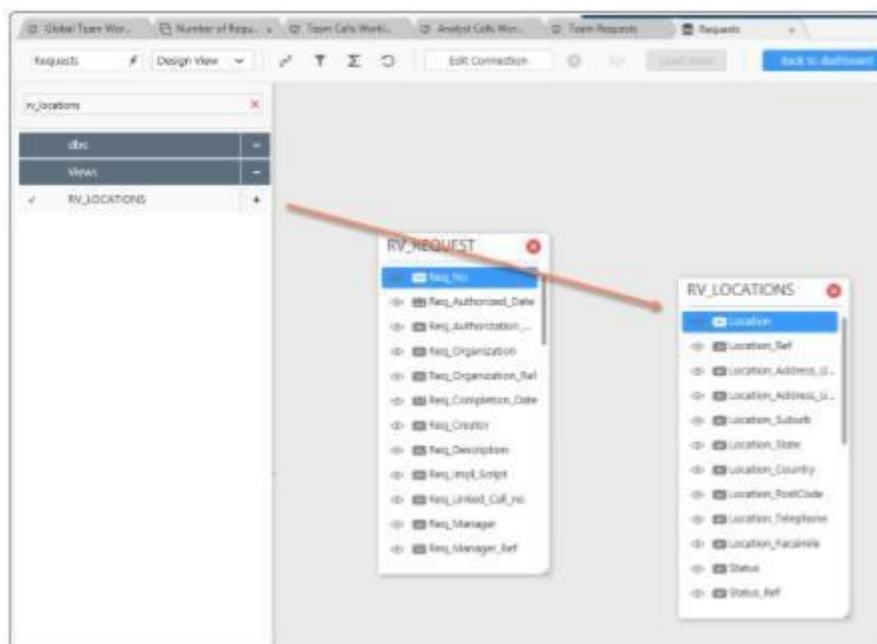
   - When prompted in the Join Editor, ensure **RV_REQUEST** is joined to **RV_LOCATIONS** via a **LEFT OUTER JOIN** and that **REQ_LOCATION_REF** equals **LOCATION_REF**
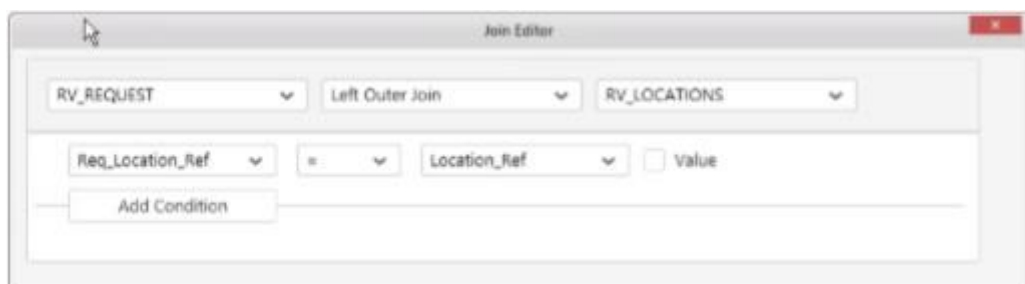

   - Then press **Merge** to complete the data join.

   - Close the Team Requests Data Source.

   - Save the Dashboard (**File>Save As>**"Global Team Workload 12.sydx").

Workshop Challenge 2 - Update the Global Team Workload Dashboard with Request Widgets

This challenge will update the main Global Team Workload dashboard page with two extra widgets that can be used to drill down into another Team Requests dashboard page to be created in Workshop Challenge 3.

1. Open your saved dashboard if necessary, by clicking on **Open Dashboard...**, or **Recent Dashboards**.

2. Click on the dashboard tab for the Global Team Workload

   Dashboard. Your dashboard should look like this:
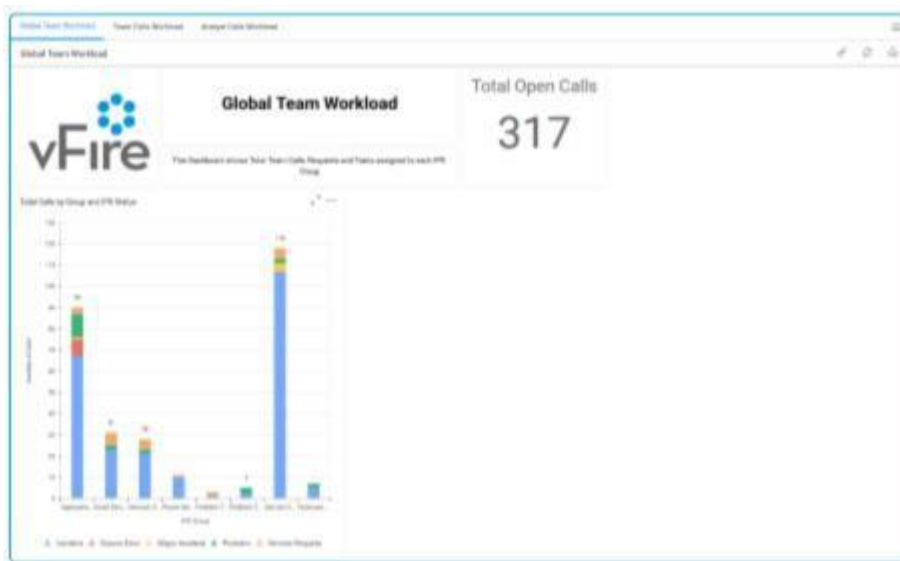
3. Add a Total Open Requests widget, as follows:

   - Select the **Card** widget from the **Deviation** group in the Widget Palette.

   - Click and drag it to the top row beside the label.

   - Drag the edges to create a **4x3** widget.

   - Change the heading to "Total Open Requests" and click on **Assign Data**.

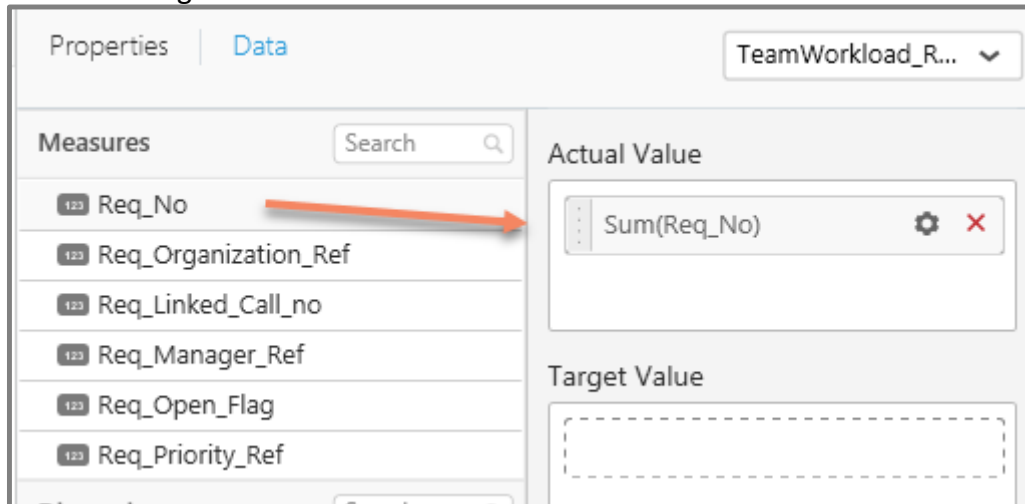   - Select the **Data** tab if necessary. (It should be blue text).
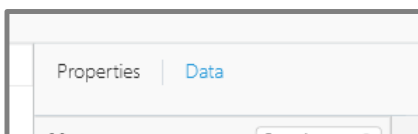
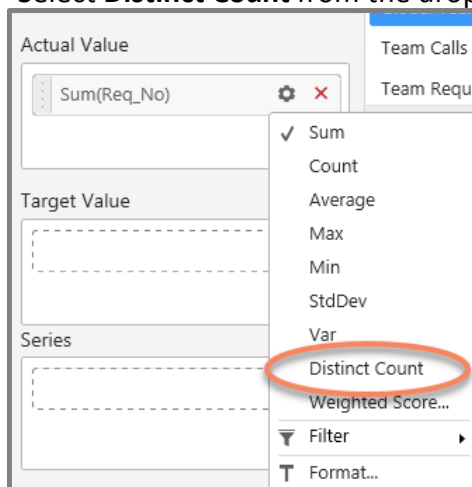   - Ensure the Team Requests Data Source is selected.
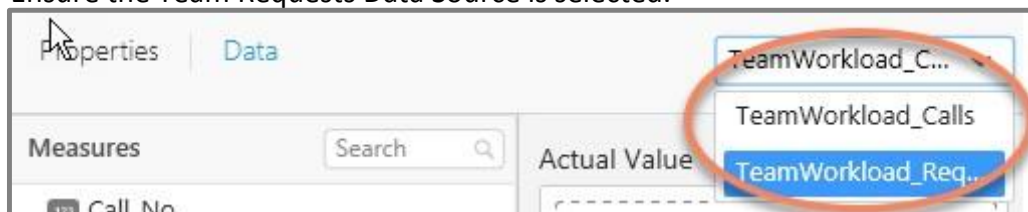
- Locate *Req_No* in the **Measures** section.
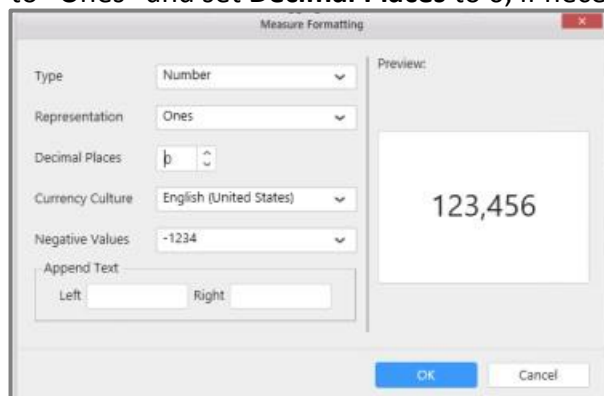- Click and drag it into the **Actual Value** box.

It is displayed as *Sum(Req_No).*

- Click on the **Settings** button ⚙ in the *Sum(Req_No)*, and:
    - Select **Distinct Count** from the drop-down menu.


    - Choose **Format** at the bottom of the menu and change **Representation** to "Ones" and set **Decimal Places** to 0, if necessary, before clicking **OK**.
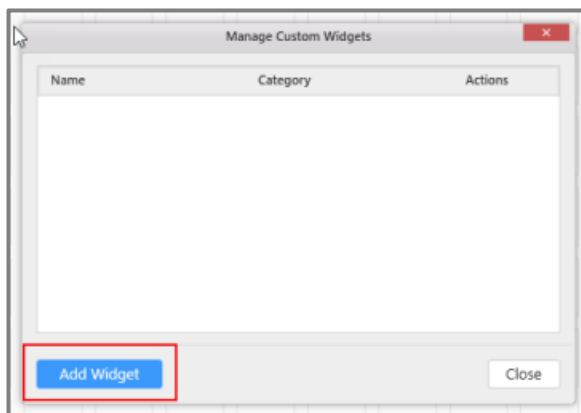
- Select the **Properties** tab, and in **Basic Settings**, change the **Title Alignment** to **Center**.

- Close the Total Open Requests widget.

4. Save your work (**File>Save As>**" Global Team Workload 13.sydx").

5. Add a New Custom Widget, as follows:

- Go to **File>Widget**.

- Select **Manage Custom Widgets**.
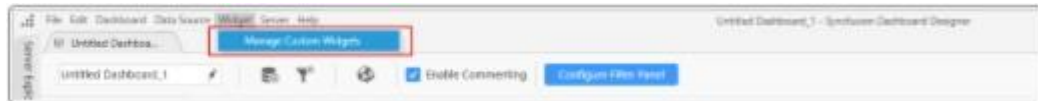
- In the Manage Custom Widgets window click on **Add Widget**.

- In the File Explorer window, navigate to the location:

    c:\ProgramData\Syncfusion\DashboardDesigner\Custom Widgets

- Select the **SunburstChart.sycw** file and press **Open**.

- Press **Close** on the Manage Custom Widgets window.

- The new chart visualization should now be in the **Relationships** section of the Toolbox Pane:

6. Add a sunburst chart showing Total Requests by Group and Type, as follows:

    •   Select the **Sunburst Chart** widget from the **Relationship** group in the Widget Palette.

    •   Click and drag it to the space next to the Bar Graph.

    •   Drag the edges to create a **9x9** widget, similar size to the Bar Chart.

    •   Change the heading to "Total Requests by Group and Type" and click on **Assign Data**.

    •   Select the **Data** tab if necessary (it should be blue text).

    •   Ensure the Team Requests Data Source is selected in the dropdown.

    •   Locate *Req_No* in the **Measures** section.

    •   Click and drag it into the **Value(s)** box. It is displayed as *Sum(Req_No)*.

    •   Click on the **Settings** button 🔧 in the *Req_No*, and select **Distinct Count** from the drop down menu.

    •   In the **Dimensions** section, locate *Req_Current_Group*.

    •   Drag it into the **Levels** box.

    •   In the **Dimensions** section, locate *Req_Type_Composite*.

    •   Drag it into the **Levels** box, below *Req_Current_Group*.

   •   Your screen should look like this:
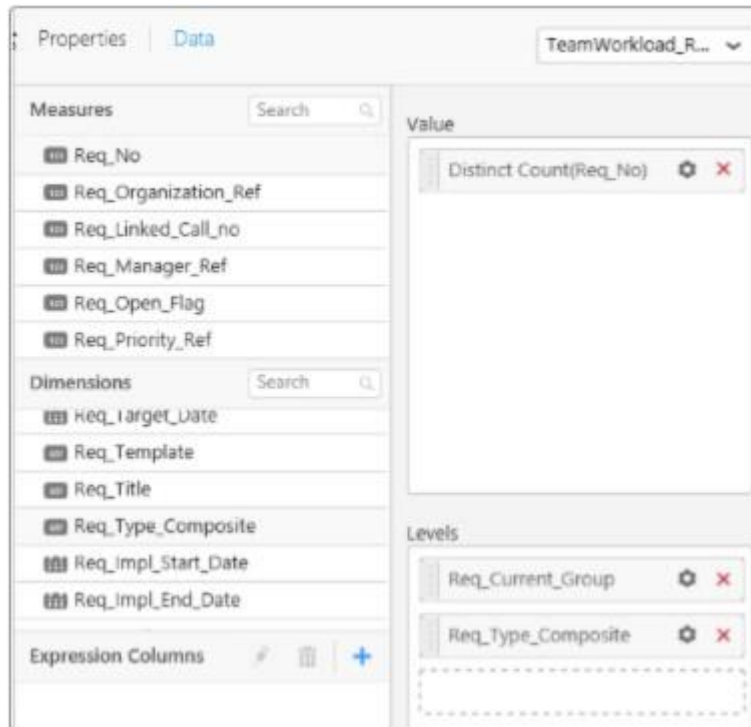
- On the **Properties** Tab in Basic Settings, uncheck **Show Legend**.

- Close the Total Requests by Group and Type tab.

7. Save your work (**File>Save As>**" Global Team Workload 14.sydx").

8. Click on **Preview** in the top right-hand corner of the screen to see a user view of your dashboard.
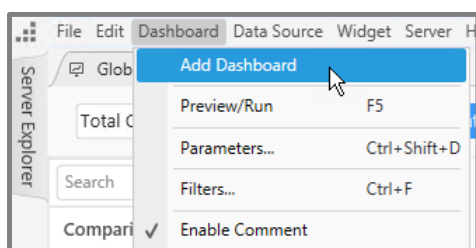
# Workshop Challenge 3 - Creating the Team Requests Workload Dashboard

This will produce a fourth page in the Dashboard that should resemble the following, although the actual figures shown may differ:
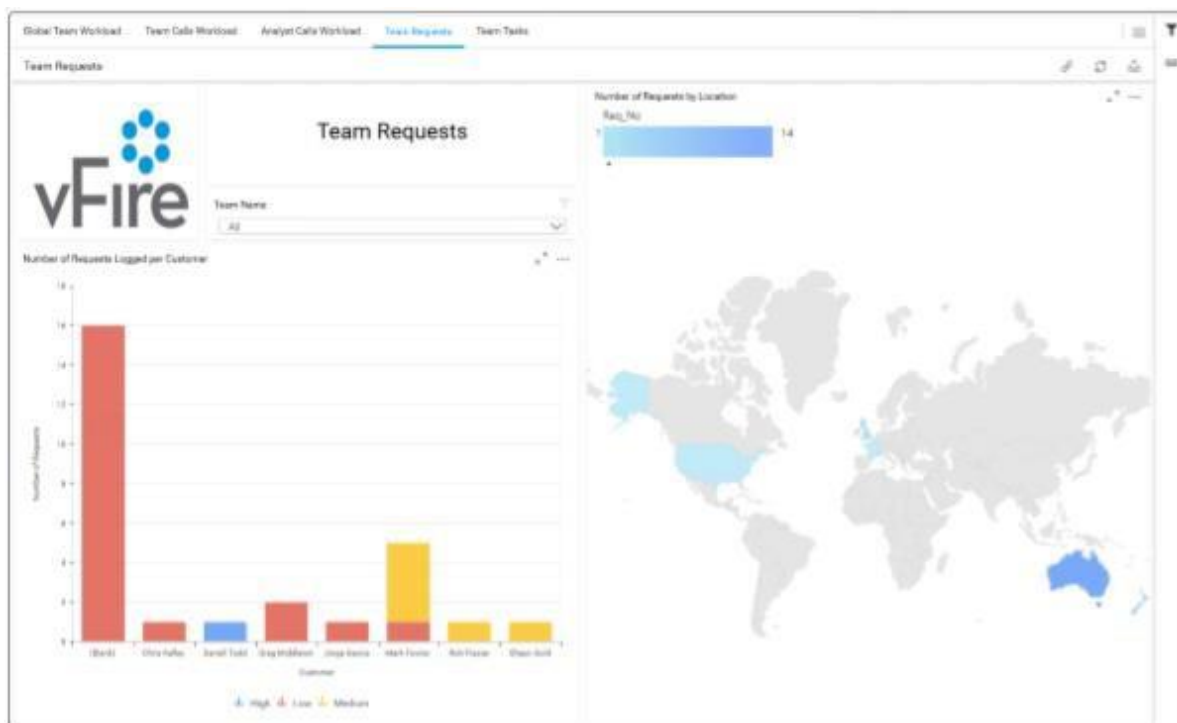
1. Open your saved dashboard if necessary, by clicking on **Open Dashboard...**, or **Recent Dashboards**.

2. In the menu, click on **Dashboard**, and then **Add Dashboard**.

3. In the **Title** field in the top left-hand corner, change the name to "Team Requests".

4. Add the logo widget in a **4x3** grid, as described in the earlier exercise, or you can reuse the **AlembaLogo** widget from the Widgets container on the right-hand side of the screen by dragging it onto the Workspace Grid.
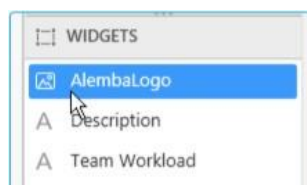
5. Add a Label widget in an **8x2** grid, to the right of the logo, which will contain the title for the dashboard, as described in the earlier exercise. Give the label the title "Team Requests".

6. Add a Team Name widget, as follows:

- Expand the **Filters** group in the Widgets Palette if necessary and select the **ComboBox** widget.

- Click and drag it below the dashboard label. Then adjust the size to create an **8x1** rectangle.

- Change the title to "Team Name", and click on **Assign Data**.

| Team Name | | Assign Data |
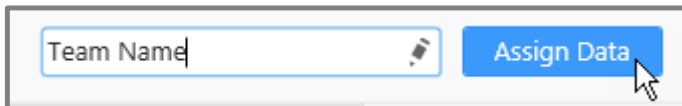
- On the **Data** tab, make sure Team Requests is selected in the drop down (top right hand of the Data Tab) and drag *Req_Current_Group* from the **Dimensions** section into the **Display Column**.

- Close the tab.

10. Save your work (**File>Save As>**" Global Team Workload 15.sydx").

11. Add a Number of Requests Logged per Customer Stacked Column Chart

- Expand the **Comparison** group in the Widgets Palette if necessary and select the **Stacked Column** widget.

- Click and drag it to below the logo. Then adjust the size to create a **12x9** widget.

- Change the title to "Number of Requests Logged per Customer" and click on **Assign Data**.
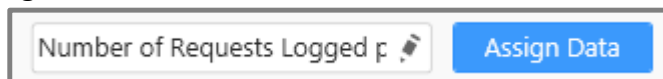
| Number of Requests Logged p | | Assign Data |

- On the **Data** tab, ensure the "Team Requests" Data Source is selected

| Properties | Data | | Team Requests ⌄ |

- Drag *Req_No* from the **Measures** section to the **Value(s)** box. Click on the **Settings** button ⚙ in the ***Sum(Req_No)*** entry and select **Distinct Count**.

- Drag *Req_Customer* from the **Dimensions** section to the **Column(s)** box.

- Drag *Req_Priority* from the **Dimensions** section to the **Row** box.

You can search for *Req_Priority* by keying some of the characters into the Search box to the right of the Dimensions section title if you wish.
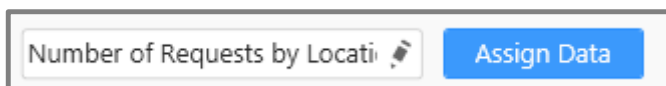
- On the **Properties** Tab:

- In **Basic Settings**, Select the **Custom...** button next to Show Legend, select **Group**, and ensure only the **Row** is displayed in the Display Format, as shown, before clicking **OK**:
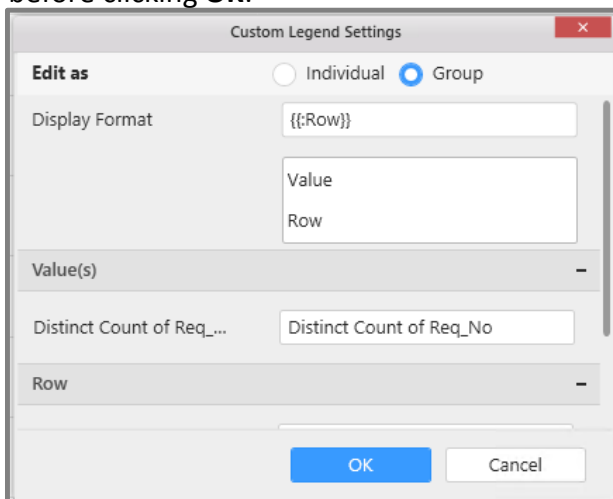
- Scroll down to **Axis** and change the **Primary Value Axis Title** to "Number of Requests".

- Change the Category Axis Title to "Customers".

- Close the Calls by IPK Status tab.

- Save your work (**File>Save As>**" Global Team Workload 16.sydx").

12. Add a Number of Requests by Location Choropleth Map widget, as follows:

- Expand the **Relationship** group in the Widgets Palette if necessary and select the **Choropleth Map** widget.

- Click and drag it into the remaining space next to the Stacked Column Chart and Label Widgets. Then adjust the size to create a **12x15** widget.

- Change the title to "Number of Requests by Location", and click on the **Assign Data** button:

- On the **Data** Tab:

  - Drag *Req_No* from the **Measures** section to the **Value** box. Click on the **Settings** button ⚙ in the *Sum(Req_No)* entry and select **Distinct Count**.

  - Drag *Location_Country* from the **Dimensions** section to the **Shape** box.

- On the **Properties** tab:

  - In **Basic Settings**, enable the **Show Legend** check box.

- Close the widget.

13. Save your work (**File>Save As>**" Global Team Workload 17.sydx").

14. Preview your dashboard, by clicking on the **Preview** button in the top right corner of the screen.

Workshop Challenge 4 - Linking the Global Team Workload Dashboard Page to the Team Requests Page

In this exercise, we will link the Global Team Workload and Team Requests Workload dashboard tabs.

1. Select the Total Requests by Group and Type Sunburst Chart.

2. Click on **Assign Data**, and display the **Properties** tab.

3. Under the **Link** menu item, do the following:

   - Enable **Linking**

   - Select **Internal**

   - Choose the "Team Requests" dashboard in the Tab dropdown

   - Select **Set Parameters** and complete the details as follows, before clicking **OK**:

     - Target Column = "Req_Current_Group"

     - Source Widget = "Total Requests by Group and Type"

     - Source Column = "Req_Current_Group"

4. Return to the Global Team Workload Dashboard and click **Preview** to preview the dashboard.

5. Click on one of the segments in the Total Requests by Group and Type Sunburst Chart on the Global Team Workload page to view Requests for a specific Workflow Group. You should see the Team Requests page, with the relevant team name (and linked chart widgets) selected.

Workshop Challenge 5 - Creating the Team Tasks Workload Dashboard

This will produce a fifth page in the Dashboard that should resemble the following, although the actual figures shown may differ:
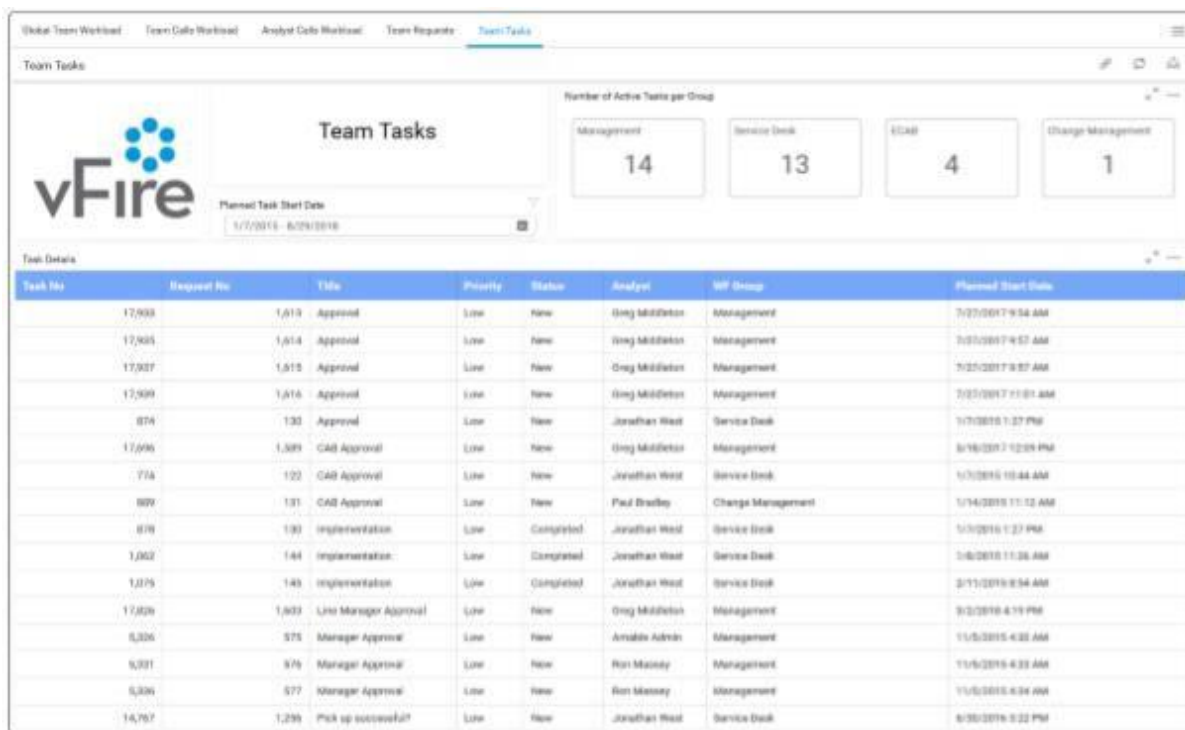
1. Open your saved dashboard if necessary, by clicking on **Open Dashboard...**, or **Recent Dashboards**.

2. Add a Data Source, as follows:

    - Click the **Add** icon in the **Data Sources** container.

   If you do not see this, click on the icon in the toolbar

    - Complete the details, as follows:

Data Source Name	Team Tasks
Connection Type	Microsoft SQL Server

| Server Name	localhost
Authentication Type	SQL Server Authentication
User name	DBUser
Password	A13mb4
Database	ASM

- Press **Connect** to establish a connection to the

    Database. The Data Source Design View is displayed:

3. Create a virtual table showing all active tasks, as follows:

    - In the left-hand pane, expand the **Views** group if necessary, and locate *RV_TASK*. Alternatively, you can search for it in the Search box.

    - Click and drag it into the work area to create a virtual table.
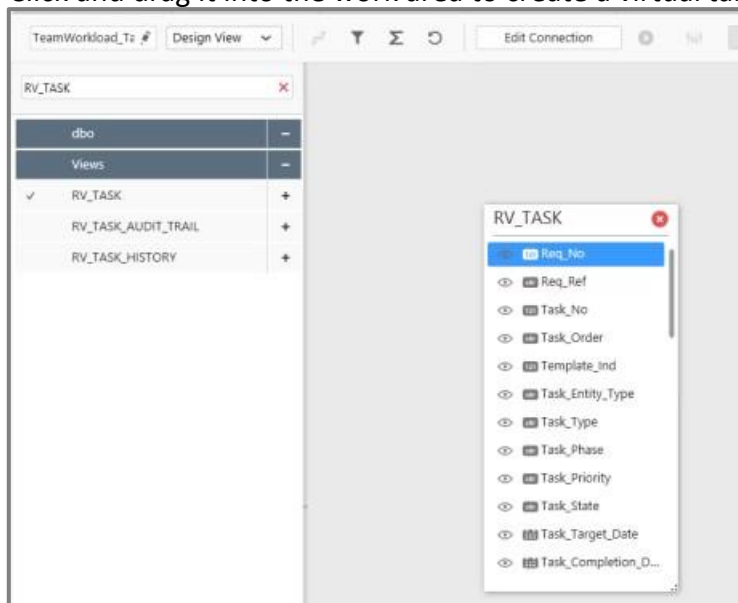

- Note the number Tasks.

- To filter the Tasks to display only Active ones, click on the **Filter** button in

    the toolbar.

- Click the **+ Add** button at the bottom of the window to add a new filter.

- Complete the details as shown below to display **Task_Active_Flag Equals 1**, before clicking **Update**.
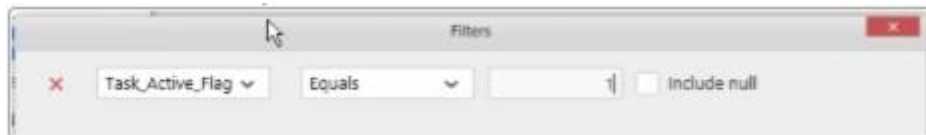
- Note that the number of Tasks has changed because you are only seeing the active Tasks.

4. Update the *Global Team Workload* page, add a Total Active Tasks widget, as follows:

- Select the **Card** widget from the **Deviation** group in the Widget Palette.

- Click and drag it to the top row beside the Total Open Requests Card Widget.

- Drag the edges to create a **4x3** widget.

- Change the heading to "Total Active Tasks" and click on **Assign Data**.

- Select the **Data** tab if necessary (it should be blue text).

- Ensure the Team Tasks Data Source is selected.

- Locate *Task_No* in the **Measures** section.

- Click and drag it into the **Actual Value** box.
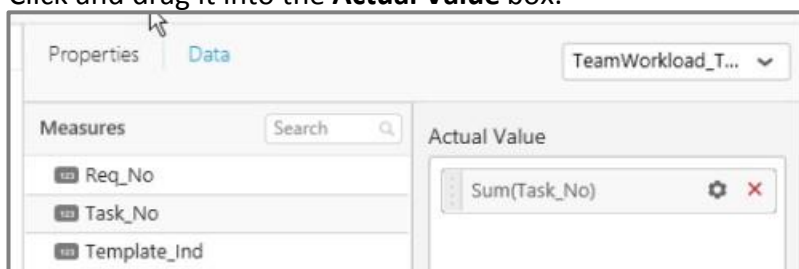

It is displayed as *Sum(Task_No)*.

- Click on the **Settings** button in the *Sum(Task_No)*

  - Select **Distinct Count** from the drop-down menu.

  - Choose **Format** at the bottom of the menu and change **Representation** to "Ones" and set **Decimal Places** to 0, if necessary, before clicking **OK**.

- Select the **Properties** tab, and in **Basic Settings**, change the **Title Alignment** to **Center**.

- Close the Total Active Tasks widget.

5. Save your work (**File>Save As>**" Global Team Workload 18.sydx").

6. Update the *Global Team Workload* page, add a Tree Map showing Total Active Tasks by Task Type, as follows:

- Select the **TreeMap Chart** widget from the **Relationship** group in the Widget Palette.

- Click and drag it to the space next to the Bar Graph.

- Drag the edges to create a **6x9** widget.

- Change the heading to "Total Active Tasks by Task Type" and click on **Assign Data**.

- Select the **Data** tab if necessary. (It should be blue text).

  - Ensure the TeamTasks Data Source is selected in the dropdown.

  - Locate *Task_No* in the **Measures** section.

  - Click and drag it into the **Value(s)** box. It is displayed as *Sum(Task_No)*.

  - Click on the **Settings** button ⚙ in the *Task_No*, and select **Distinct Count** from the drop down menu.

  - In the **Dimensions** section, locate *Task_Type*.

  - Drag it into the **Group by** box.

  - Your screen should look like this:
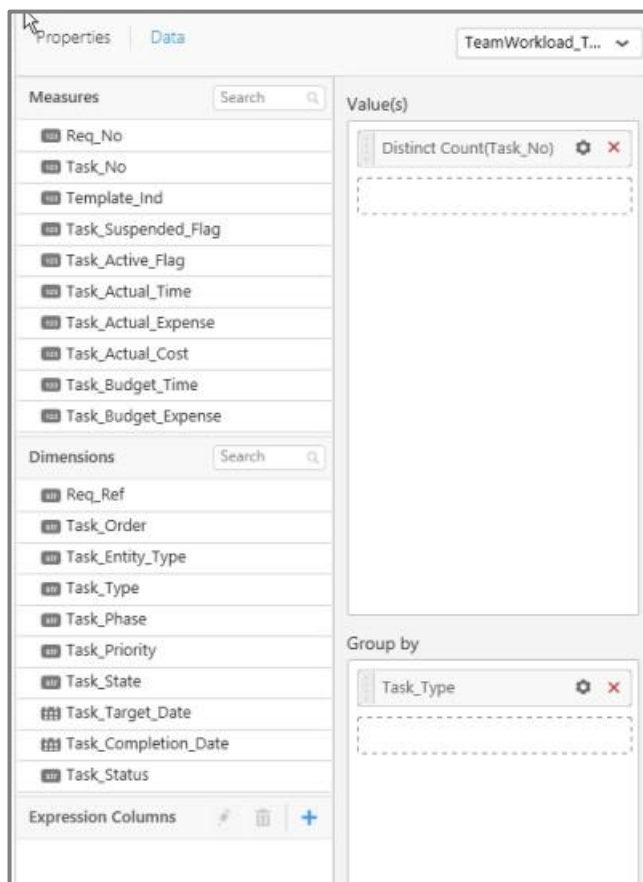
- Close the Total Active Tasks by Task Type tab.

7. Save your work (**File>Save As>**" Global Team Workload 19.sydx").

8. Click on **Preview** in the top right-hand corner of the screen to see a user view of your dashboard.

9. Now add a new Team Tasks Dashboard, in the menu, click on **Dashboard**, and then **Add Dashboard**.
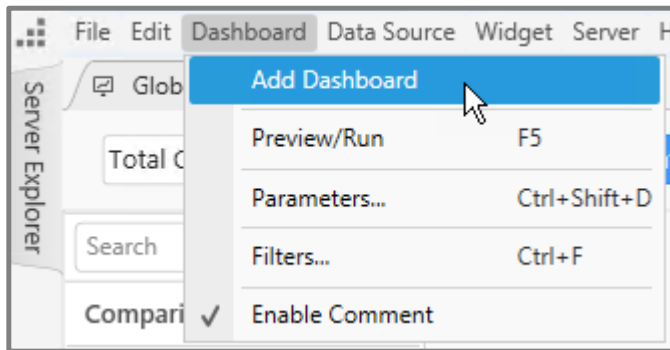
10. In the **Title** field in the top left-hand corner, change the name to "Team Tasks Workload".

11. Add the logo widget in a **4x3** grid, as described in the earlier exercise, or you can reuse the **AlembaLogo** widget from the Widgets container on the right-hand side of the screen by dragging it onto the Workspace Grid.

12. Add a Label widget in an **8x2** grid, to the right of the logo, which will contain the title for the dashboard, as described in the earlier exercise. Give the dashboard the title "Team Tasks".

13. Save your dashboard (**File>Save As>**" Global Team Workload 19.sydx").

14. Add a Planned Task Start Date Date Picker filter widget, as follows:

    - Expand the **Filters** group in the Widgets Palette if necessary and select **DatePicker** widget.

    - Click and drag it to below the dashboard label. Then adjust the size to create an **8x1** rectangle.

    - Change the title to "Planned Task Start Date" and click on **Assign Data**.

    - On the **Data** tab, make sure Tasks is selected in the drop down (top right hand of the Data Tab):

        - Drag *Task_Planned_Start_Date* from the **Dimensions** section into the **Column**.

            - Click on the **Settings** button [⚙] in the *Sum(Task_No)* entry and select **Distinct Count**.

        - Drag the *Task_Planned_Start_Date* from the **Dimensions** section to the **Argument** section.

    - On the **Properties** Tab change the **Selection Type** to **Range**.

    - Close the tab.

15. Save your work (**File>Save As>**" Global Team Workload 20.sydx").

16. Add a Grid widget to display Task Information:

- Expand the **Relationship** group in the Widgets Palette if necessary, and select the **Grid** widget.

- Click and drag it to below the logo. Then adjust the size to create a **24x12** widget.

- Change the title to "Task Details" and click on **Assign Data**.

| Number of Requests Logged p 🖉 | Assign Data |
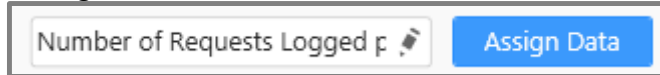
- On the **Data** tab, ensure the Tasks Data Source is selected.

  - Drag *Task_No* from the **Measures** section to the **Value(s)** box. Click on the **Settings** button ⚙ in the *Sum(Task_No)* entry and select **None**.

  - Drag *Req_No* from the **Measures** section to the **Value(s)** box. Click on the Settings button ⚙ in the ***Sum(Req_No)*** entry and select **None**.

  - Drag *Task_Title* from the **Dimensions** section to the **Column(s)** box.

  - Drag *Task_Priority* from the **Dimensions** section to the **Column(s)** box.

  - Drag *Task_Status* from the **Dimensions** section to the **Column(s)** box.

  - Drag *Task_Current_Officer* from the **Dimensions** section to the **Column(s)** box.

  - Drag *Task_Current_Group* from the **Dimensions** section to the **Column(s)** box.

  - Drag *Task_Planned_Start_Date* from the **Dimensions** section to the **Column(s)** box. Click on the Settings button ⚙ in the **Year(Task_Planned_Start_Date)** entry and select **Date Time**.

    You can search for *Task_Priority* by keying some of the characters into the Search box to the right of the Dimensions section title if you wish.

- On the **Properties** Tab:

  - In **Column Settings**, Select the **Edit Column Names...** button and modify the column names:
    Scroll down to **Axis**, and change the **Primary Value Axis Title** to "Number of Tasks"

  - In the **Basic Settings** section enable **Fit to Content**.

  - Close the Task Details tab.

17. Save your work (**File>Save As>**" Global Team Workload 21.sydx").

18. Add a Number of Active Tasks per Group Card Widget as follows:

- Expand the **Deviation** group in the Widgets Palette if necessary and select the **Card** widget.

- Click and drag it to next to the Label and Date Picker Filter Widget. Then adjust the size to create a **12x3** widget.

- Change the title to "Number of Active Tasks per Group" and click on the **Assign Data** button.

- Drag *Task_No* from the **Measures** section to the **Actual Value(s)** box. Click on the **Settings** button ⚙ in the *Sum(Task_No)* entry and select **Distinct Count**.

- Drag *Task_Current_Group* from the **Dimensions** section to the **Series**.

- Close the Number of Tasks per Group widget.

19. Save your work (**File>Save As>**"Global Team Workload 22.sydx").

20. Preview your dashboard, by clicking on the **Preview** button in the top right corner of the screen.

# Workshop Challenge 6 - Setting Dashboard Refresh Options

1. Launch the *Alemba Dashboard Designer*, using the icon on your desktop.

2. Go to **File>Open** to load the Global Team Workload Dashboard.

3. Go to the **Dashboard>Refresh Settings** menu item.

4. In the **Refresh Settings** window select **Enable Auto Refresh** on the Global Team Workload Dashboard Page.

5. Ensure the **Dashboard** Option is selected and then press the **Set Timer** button:
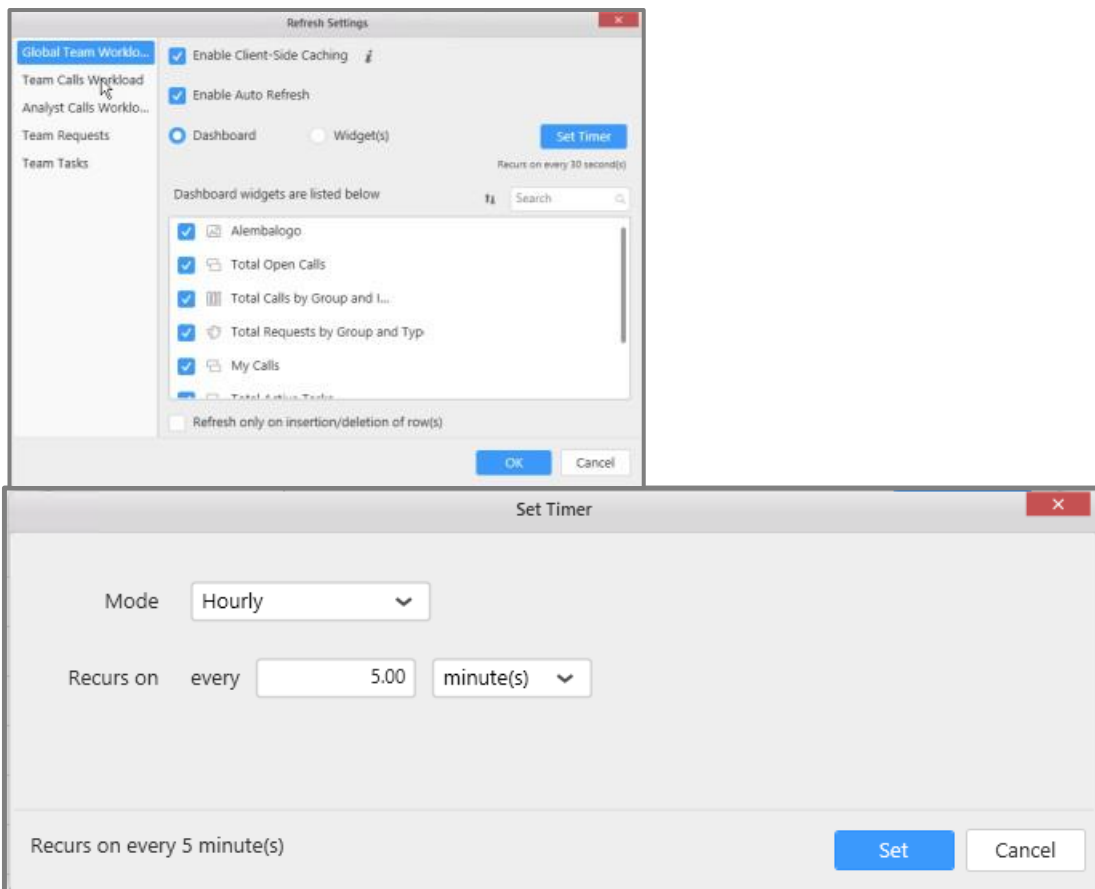
6. Change the Timer to refresh the Dashboard Page every 5 Minutes and then press the **Set** button:

7. Select the Team Calls Workload Dashboard Page.

8. Select the **Enable Auto Refresh** option then toggle so that the **Widget(s)** option is selected.

9. Check all the widgets that contain gauges, grids or chart information (not the Layout Widgets or Filters).

10. On the Calls by IPK Status and Priority widget choose the Set Timer option from the 3 Dot Menu icon and set the refresh setting to 5 seconds.
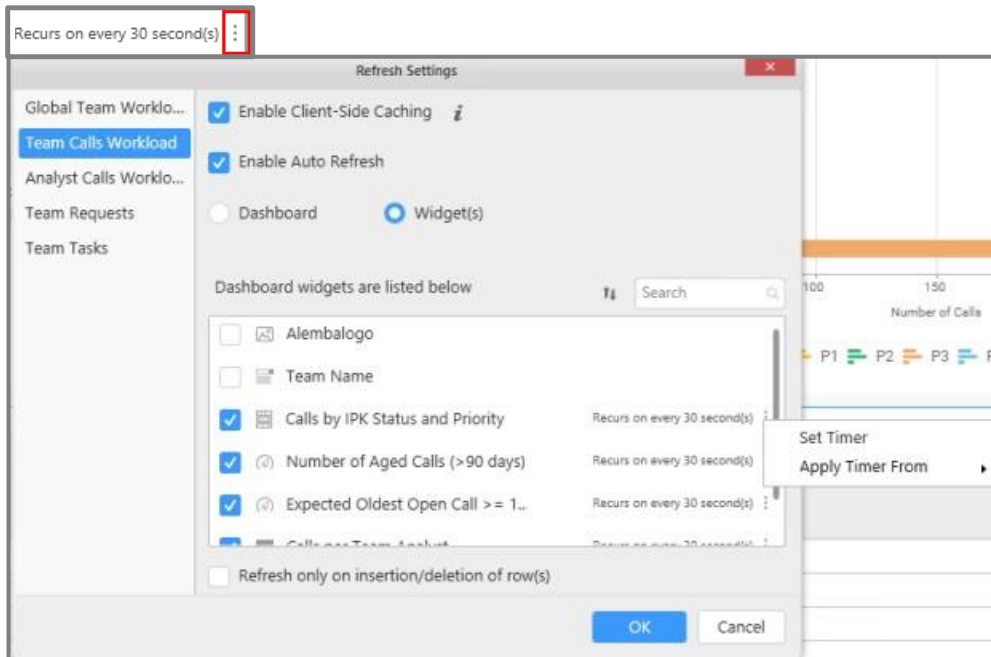

11. For the remaining Widgets either set an appropriate timer frequency or from the 3 Dot Menu choose **Apply Timer From** and select the Calls by IPK Status and Priority item to copy the refresh timer.

12. If you wish, repeat **Steps 7 to 11** for the Analyst Calls Workload, Team Requests and Team Tasks Dashboard pages.

13. Press **OK** on the Refresh Settings window to apply the settings. If you need to alter these at any time, then you can return to these settings at any time by going to the **Dashboard>Refresh Settings** menu item.
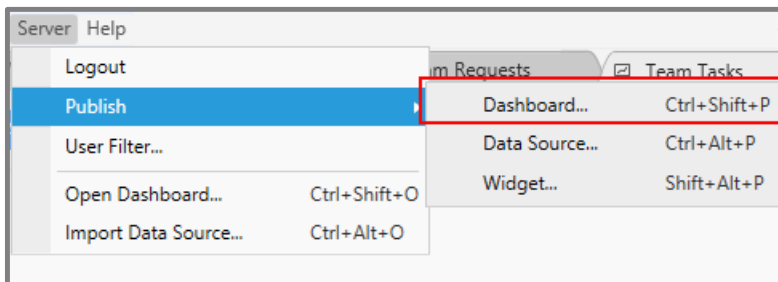
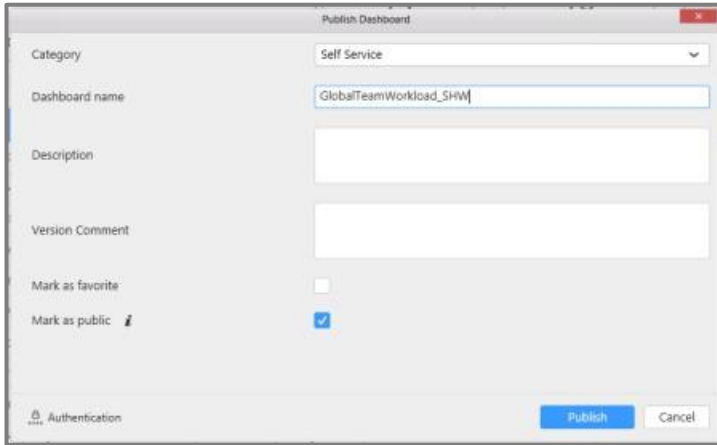# Publishing a Dashboard to the Dashboard Server

1. If the Dashboard Designer is already logged in as a user proceed to Step 4,

    otherwise click on the User Icon in the top right-hand corner of the Designer. ⬚

2. Choose **New User Login**.

3. Enter the **Server URL** and **Username/Password** for a Dashboard Server User, press **Login**.
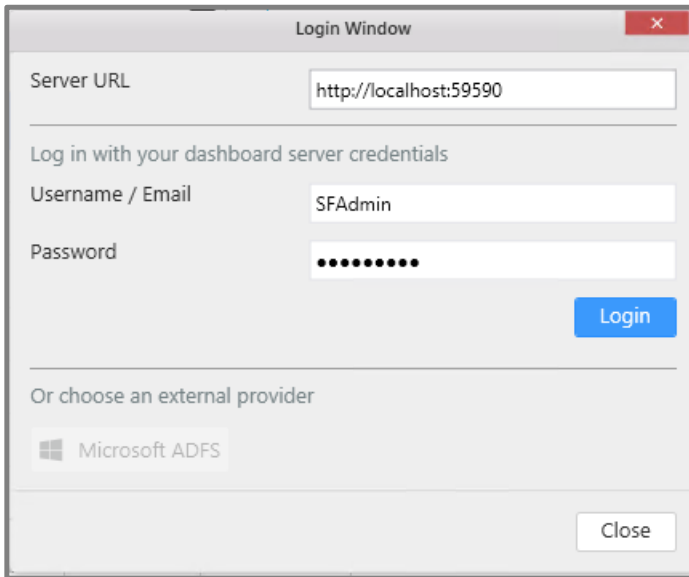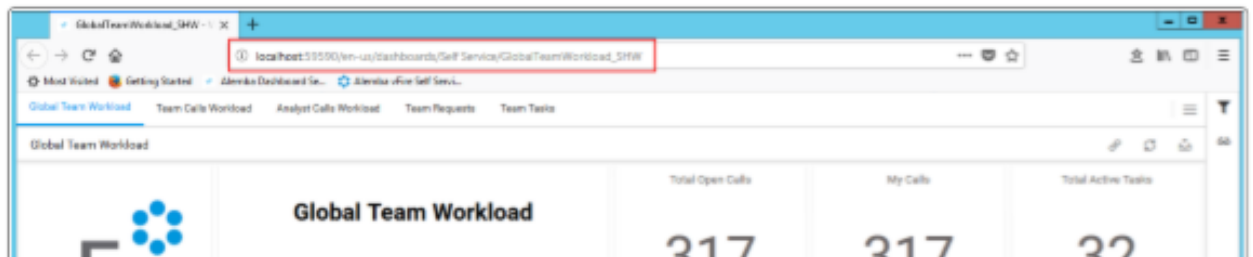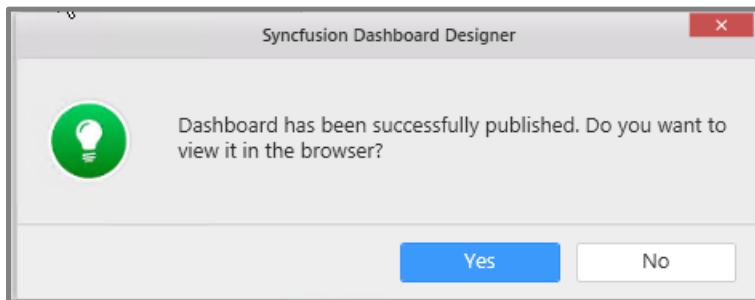

4. Go to the **Server>Publish>Dashboard** Menu:

5. In the **Publish Dashboard** window give the Dashboard a name with your initials e.g. **GlobalTeamWorkload_XXX**, ensure **Mark as Public** is selected then press **Publish** button:

6. When the Dashboard has been published then you are able to view the Dashboard from the Dashboard Server by pressing the **Yes** button:

7. Save your work (**File>Save As>**"Global Team Workload 23.sydx").

8. Close the Dashboard Designer (**File>Exit**).

Troubleshooting

Improving Dashboard Performance

1. Create views

Lots of join operations take more time. If you find yourself creating a data connection with many tables, you can create a view in the database for those joined tables. It will help to improve the performance of the dashboard. Also, it will simplify the view in dashboard designer.

Tables (Joined):

Views:

2. Create initial filter

Filter data as early as possible. For example, if your dashboard shows data for a certain date range, time range, a specific set of regions etc., using initial filter at the earlier stage can help to improve the performance.
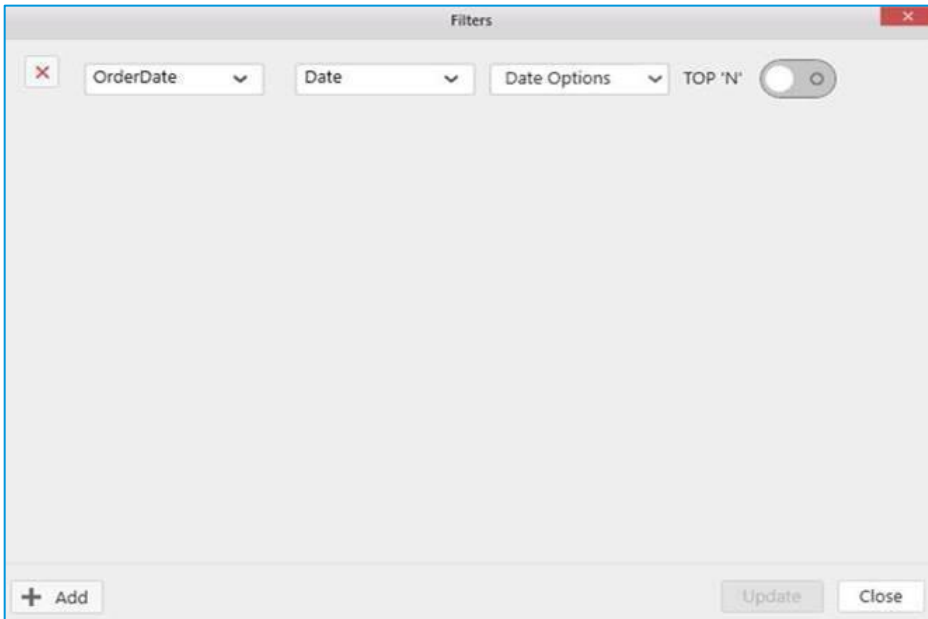
3. Remove unused columns

Reduce the number of columns in the table schema from the dashboard designer view by manually excluding the unused columns.

4. Avoid creating complex expressions

The following actions may improve dashboard performance:

- If possible, avoid or reduce complex expressions.

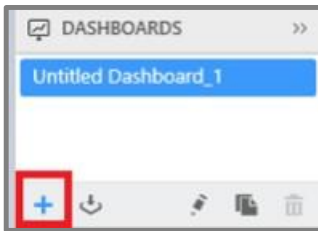- Avoid creating filters for calculated dimensions.

5. Avoid changing datatype

Datatype change in designer reduces the performance. If possible, do datatype changes in the database itself.

6. Avoid using too many widgets

Don't use too many widgets in one single dashboard. If you have used many widgets, move to another dashboard using multiple dashboard option.

7. Aggregate the raw data

If the granularity of your raw data is higher than the data you intend to display, aggregate it to the smallest granularity you need. If possible, aggregate the raw data instead of using "None" option or "Enable Data Grouping" option in dashboard.
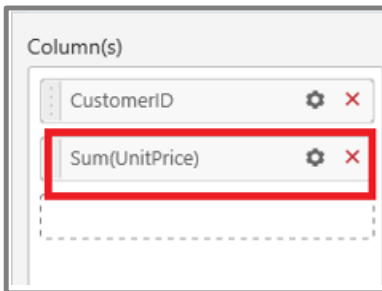
8. Moving file type data to server

If you're using file type database such as Excel, CSV, JSON, before connecting dashboard designer, move your data to another server like SQL. It will improve your overall dashboard performance.

Further Information

Product Information and Online Support

For information about Alemba products, licensing and services, visit **www.alemba.com**.

For release notes and software updates, go to **www.alemba.help**.

Up-to-date product documentation, training materials and videos can be found at **www.alemba.help/help**.

You may need to register to access some of these details.

Technical Support

For technical support, please visit: and select the **ASM support** link. You will need to log in to the Alemba self service portal to contact the Alemba Service Desk.

Comments and Feedback

If you have any comments or feedback on this documentation, submit it to info@alemba.com.