

Alemba User Day Alemba Service Manager Skills

Alemba Dashboard Designer

Version 1.0



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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.
 - n eshboard Config Mena Ξ th President Live Dathboard 2 \$14 Widget Parlette ¥1. TT: Containers (List of Revo or Dashboard 3 3 1E Workspace Area
- 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

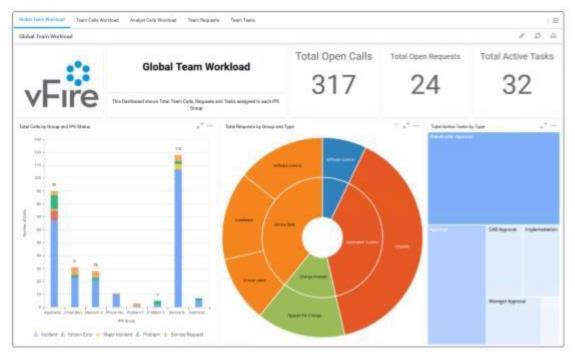
Provide a Multi Tabbed Dashboard containing the following 5 Dashboard Pages:

- 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.

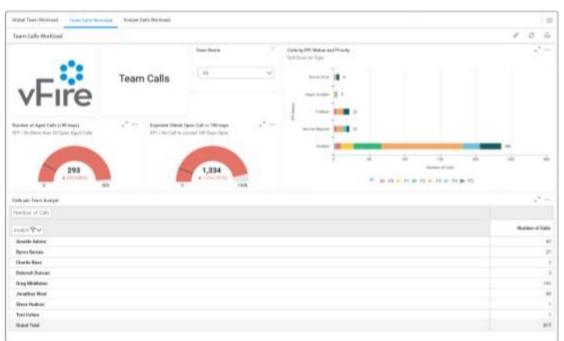


The Dashboard Layout

1. Global Team Dashboard



2. Team Calls Workload

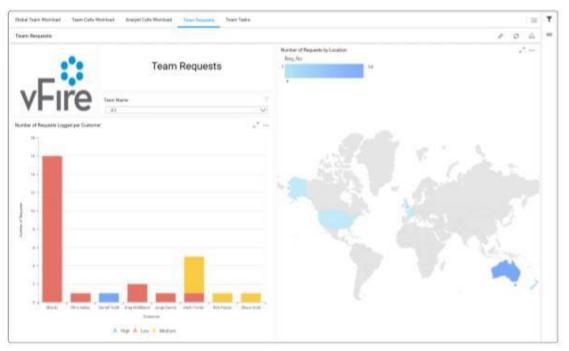




3. Analyst Calls Workload

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4. Team Requests





5. Team Tasks

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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.



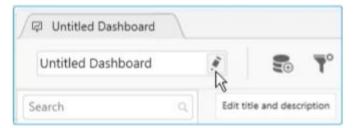
Step by Step 1 - Creating the Global Team Workload Dashboard

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:

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Global Team Workload			10
-	Global Team Workload	Total Open Calls	
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- 1. Launch the Alemba Dashboard Designer, using the icon on your desktop. Designer
- 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

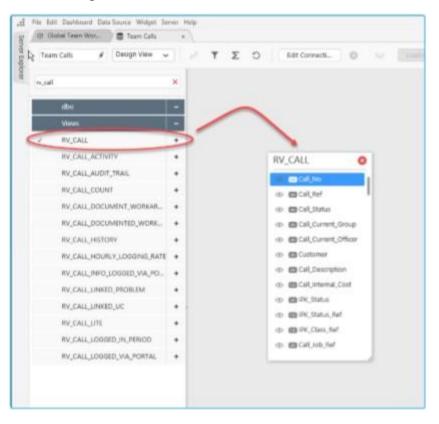
• Press Connect to establish a connection to the

Database. The Data Source Design View is displayed:





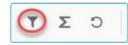
- 4. Create a virtual table showing all open calls, as follows:
 - In the left-hand pane, expand the **Views** group if necessary, and locate *RV_CALL*. Alternatively, you can search for it in the Search box.
 - Click and drag it into the work area to create a virtual table.



• Note the number of calls in the Data Preview section, beneath the work area.

	•	 IPK_Class_Ref Call_Job_Ref 	_				
Data Preview 🛛	3	Inter	action		ed in the preview and will not a	ffect the underlying data.	317 rows retrieved
Call_No	Т	Call_Ref	T	Call_Status	Call_Current_Group T	Call_Current_Officer T	Customer T
	3			New	Network Services	Greg Middleton	Angelo Rowe
	6			Resolved	Default	Amable Admin	Wendy Brock
	7			Resolved	Default	Amable Admin	David Sullivan

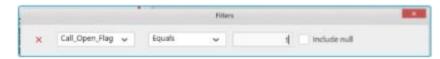
- Locate the *IPK_Status* field and click on the Settings menu and **Rename Column** to be *IPK Status* (no underscore)
- To filter the calls to display only open ones, click on the filter icon in the Dashboard Config Menu.



• 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.

	 IPK_Class_Ref Call_Job_Ref 				
Data Preview 🛛 🗒	Interaction	s in the grid will only be reflecte		ffect the underlying data.	192 rows retrieved
Call_No T	Call_Ref	Call_Status	Call_Current_Group	Call_Current_Officer T	Customer T
	3	New	Network Services	Greg Middleton	Angelo Rowe
4	3	New	Service Desk	Jonathan West	Marion Watkins
5	4	Allocated	Application Support	Toni Cohen	Emma Davies

- 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.

Data 🚬
20

- 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.



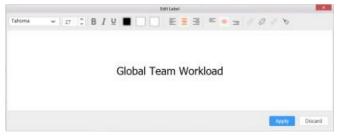
- 6. Add a label to the "Global Team Workload", as follows:
 - Select the Label widget from the Miscellaneous group in the Widget Palette.
 - Click and drag it to the top row beside the logo.
 - Drag the edges to create an **8x2** widget.



• Change the heading to "Title" and click on **Edit Label**.



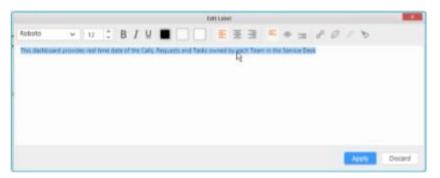
• In the window, key in "Global Team Workload" as the text, and format as shown, before clicking **Apply**.



- 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.



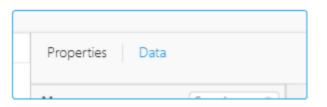
• In the window, key in "This dashboard provides real time data of the Calls, Requests and Tasks owned by each Team in the Service Desk" as the description, and format as shown, before clicking **Apply**.



- 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.

Properties C	Jata	Team Calls 🗸 🗸
Measures	Search Q	Actual Value
Call_No		
Call_Internal	Cost	Call_Not
IPK_Status_R	ef	

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.

Sum(Call_No)	¢ ×	
	√ Sum	
	Count	
	Average	
	Max	
	Min	
	StdDev	
	Var	
	Distinct Co	unt
	Weighted	Score.
	w Filter	

 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.



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Negative Values	-1234	~	
Append Text			
Left	Right		
		_	

- 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).

	Properties	Data		
-	riopentes	ald		

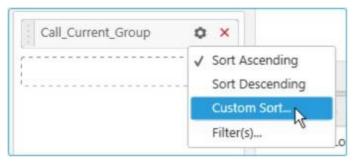
- Locate *Call_No* in the **Measures** section.
- Click and drag it into the Value(s) box. It is displayed as Sum(Call_No).
- Click on the **Settings** button in the *Sum(Call_No)*, and select **Distinct Count** from the drop down menu.
- In the **Dimensions** section, locate *Call_Current_Group*.
- 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.

Edit as	🔵 Individual 🔘 Group
Display Format	{{:Row}}
	Value Row
Value(s)	
Distinct Count of Call	Distinct Count of Call_No
Row	

- 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**.

	Advanced Sorting	Options	
Sort By			
O Alphabetic	Data Source Order	- Field	Manual
Sort Order			
Ascending	O Descending		
		Apply	Cancel

- 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.

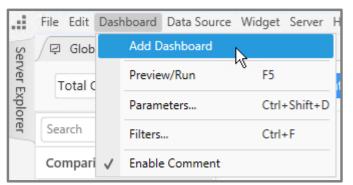


Step by Step 2 - Creating the Team Calls Workload Dashboard

This will produce the next page in the Dashboard that should resemble the following, although the actual figures shown may differ:

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Byron Barney							27
Orafie Base							
Deburah Evacuat							
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Jurantian West							*6
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Text Calase							

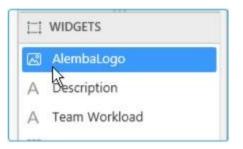
- 1. If it is not already on screen, launch the *Alemba Dashboard Designer*, using the icon on your desktop.
- 2. Open your saved dashboard if necessary, by clicking on **Open Dashboard...**, or **Recent Dashboards**.
- 3. In the menu, click on **Dashboard**, and then **Add Dashboard**.



4. In the **Title** field in the top left-hand corner, change the name to "Team Calls Workload".



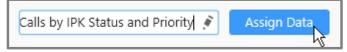
5. Add a logo widget in a **4x3** grid, as described in the earlier exercise, or you can reuse the **AlembaLogo** widget from the Widgets container on the right-hand side of the screen by dragging it onto the Workspace Grid.



- 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:

	Filters
List	Incident,Known Error,Major In CheckAll Search
Condition Column Summary Equals	 Incident Known Error Major Incident Problem Service Request
Rank Mode	Events HR Issue Include Exclude Apply Cancel
Count	
Column Summary	Call_No ~
	OK Cancel

• 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.



• Select **Manual Option** and drag the priorities to match the following display, before clicking **Apply**:

	Advanced Sorting	Options	
Sort By			
Alphabetic	O Data Source Order	💮 Field	O Manual
Drag and drop to re-	arrange the below values in desi	red order.	
Priority 5			
Priority 4			
Priority 3			
Priority 2			
Priority 1			
Unspecified			
			6
		Apply	Cancel

- 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**:

Cus	tom Legend Settings
Edit as	🔵 Individual 🧿 Group
Display Format	((:Row))
	Value
	Row
Value(s)	-
Distinct Count of Call	Distinct Count of Call_No
Row	-
	OK Cancel

- 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.

+ Add	💼 Delete

• Complete the details as follows:

Name	CallAgeDays
Expressi on	<pre>DAYDIFF([Call_Log_Date],TODAY())</pre>

- 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
Expressio n	<pre>IF([CallAgeDays]>90,1,0)</pre>

• 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 TargetValue 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 **EditColumn Names**, and update the details as follows, before clicking **OK**:

Call_No	Number of Calls
CallAgeDays	Avg. Call Age
CallsOlder90	Aged Calls (>90 Days)
Call_Current_Offi	Analyst

- 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.

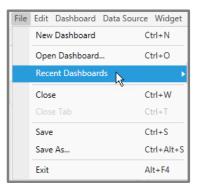


Step by Step 4 - Creating the Analyst Calls Dashboard

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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.



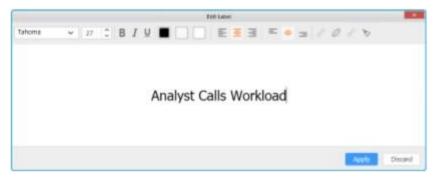
- Click and drag the **Image** widget onto the top left-hand corner of the workspace area.
- Drag the edges to create a **4x3** square in the top left-hand corner.
- In the top left corner, change the heading to "AlembaLogo", and click on Assign Data.

AlembaLogo	Assign Data
	45

- 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:

Call_No	Number of calls
Customer	Customer
Problem_Type_C	Problem type
Call_Priority	Priority
IPK_Status	Status
CallAgeDays	Call Age (Days)

- 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.

Based On	CallAgeDays (Sum)	
Color Settings	Single Color	~
Formatting Type	Column	~
Condition Type	Greater Than Or Equal To	
Values	90.00	
Font	📕 B I 🖳	S
Background		

- Press OK and Close.
- Select Call_Priority Column and select Conditional Formatting, press Edit...
- Press the **Add** Button



• Change the details, as shown.

Grie	d Conditional Formatting X
Based On	Call_Priority ~
Formatting Type	Row ~
Condition Type	Equals 🗸
	✓ Case sensitive
Value	P1
Font	■ I <u>U</u> ³
Background	
	OK Cancel

- 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. <u>http://localhost/ASM/dashboards/{0}.jpg</u>
 - 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></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.

即 6	Slobal Team Wor	GT Team Calls		自	Team	Reques	ts	🛱 Team Taski	6		
Tea	mWorkload_Re 🖋	Design View	*	e.	٣	Σ	С	Edit Cor	nection		
rv_res	quest		×								
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4	RV_REQUEST	-		-	-			Reg_No			
	RV_REQUEST_BU	IDGET	+				⊕ til	Req_Authorize	d_Date		
	RV_REQUEST_CA	LENDAR	+				•	Req_Authorizat	tion		
	RV_REQUEST_CMDB_DETAILS				0		•	Req_Organization			
	RV_REQUEST_SC	HEDULES	+				•	Req_Organizat	ion_Ref		
	RV_REQUEST_TE	MPLATES	+					Req_Completion	n_Date		
	RV_REQUEST_TO	_CALL	+					Req_Creator			
	RV_REQUEST_W	ITH_CMD8	+		s Dravi		. D. E	Reg Descriptio	e). Genera in M		

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



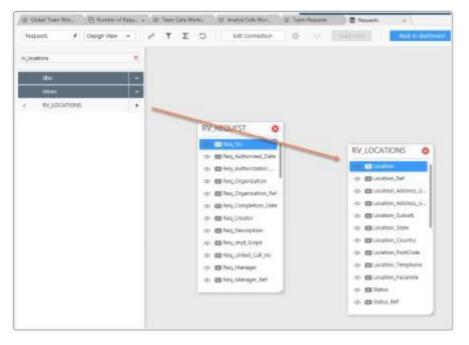
• Click the **+ Add** button at the bottom of the window to add a new filter.



• 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

RV_REQUEST		- 1	eft Outer	Join 👻	RV,	LOCATIONS	~
Req_Location_Ref	~		~	Location_Ref	×	Value	
Add Condition	-						

- 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).

Properties Data	
Ensure the Team Requests Data Source	e is selected.
Properties Data	TeamWorkload_C

Phoperties D	ata		TeamWorkload_C
		(TeamWorkload_Calls
Measures	Search Q	Actual Value	TeamWorkload_Req.
De Call No		e	



- Locate *Req_No* in the **Measures** section.
- Click and drag it into the **Actual Value** box.

Properties Da	ita		TeamWorkload_R 🗸
Measures	Search	Q,	Actual Value
🚥 Req_No			Sum(Req_No)
🚥 Req_Organizat	ion_Ref	-	
Req_Linked_Ca	all_no		
🚥 Req_Manager_	Ref		Target Value
🚥 Req_Open_Fla	g		
🚥 Req_Priority_R	ef		
	(a		

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.

Actual Value			Team Calls
Sum(Req_No)	٥	×	Team Reque
	\checkmark	Sum	
		Count	
Target Value		Averag	e
[Max	
		Min	
		StdDev	,
Series		Var	
[C	Distinc	t Count
		Weight	ted Score
	Ŧ	Filter	•
	Т	Format	

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

	Measure F	ormatting	, ×
Туре	Number	~	Preview:
Representation	Ones	~	
Decimal Places	þ C		
Currency Culture	English (United States)	~	123,456
Negative Values	-1234	~	
Append Text		-	
Left	Right		
			OK Cancel
			Concer

- 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.

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ver top	untitled Dashboard_1	1	6	${\bf T}^{\rm c}$	ø	Evolle Commenting	Configure Film Fairel	

• In the Manage Custom Widgets window click on Add Widget.

	Manage Custom Widgets	×
Name	Category	Actions
	7	
Add Widget		Close

• 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:



Measures	Search		Value		
Req_No			Distinct Count(Reg. No)	Ó	×
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- 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.

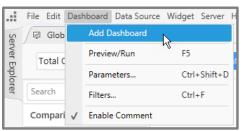


Workshop Challenge 3 - Creating the Team Requests Workload Dashboard

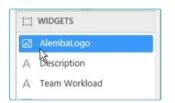
This will produce a fourth page in the Dashboard that should resemble the following, although the actual figures shown may differ:



- 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.



- 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.



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



- 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.

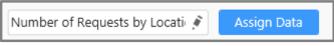
• On the **Properties** Tab:



• 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**:

Custom Legend Settings ×						
Edit as	🔵 Individual 🧿 Group					
Display Format	{{:Row}}					
	Value					
	Row					
Value(s)	-					
Distinct Count of Req	Distinct Count of Req_No					
Row	-					
	OK Cancel					

- 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:

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- 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:

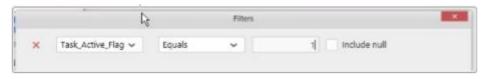
- 3. Create a virtual table showing all active tasks, as follows:
 - In the left-hand pane, expand the **Views** group if necessary, and locate *RV_TASK*. Alternatively, you can search for it in the Search box.
 - Click and drag it into the work area to create a virtual table.

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	RV_TASK_AUDIT_TRAIL	+			RV_TASK Ø
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- 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.

Properties D	ata	TeamWo	orkload_T 🗸
Measures	Search Q	Actual Value	
🚥 Req_No		Sum(Task_No)	o ×
💷 Task_No		Sum(Task_NO)	* *
Template_Ind			

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.



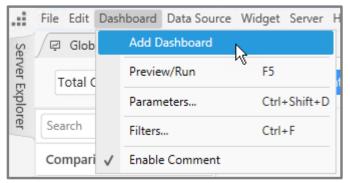
- Click and drag it to the space next to the Bar Graph.
- Drag the edges to create a **6x9** widget.
- Change the heading to "Total Active Tasks by Task Type" and click on Assign Data.
- Select the **Data** tab if necessary. (It should be blue text).
 - Ensure the TeamTasks Data Source is selected in 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:

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m Task_Type			
m Task_Phase			
Task_Priority		Group by	
🚥 Task_State		Task_Type	¢ ×
(#) Task_Target_I	Date		
III Task_Comple	tion_Date		
Task_Status			
Expression Colum	ns 🖋 🗇 🕇		

- 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 isselected.
 - 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:

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- 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.

	Refresh Settings			×
Global Team Worklo Team Calls Workload Analyst Calls Worklo Team Requests Team Tasks	 Enable Client-Side Caching i Enable Auto Refresh Dashboard Widget(s) Dashboard widgets are listed below 	74	Search	Q 100 150 Number of Cells
	 Alembalogo Team Name Calls by IPK Status and Priority Calls by IPK Status and Priority Number of Aged Calls (>90 days) Expected Oldest Open Call >= 1 Expected Oldest Open Call >= 1 	Recurs Recurs	on every 30 second(s) on every 30 second(s) on every 30 second(s)	P1 P2 P3 P3 P

- 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 to11** 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.

L	ogin Window
Server URL	http://localhost:59590
Log in with your dashboard se	erver credentials
Username / Email	SFAdmin
Password	•••••
	Login
Or choose an external provide	۲ ۲
Microsoft ADFS	
	Close

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

Sen	ver Help			(
	Logout		m Requests 🛛 🖂	Team Tasks
	Publish		Dashboard	Ctrl+Shift+P
	User Filter		Data Source	Ctrl+Alt+P
	Open Dashboard	Ctrl+Shift+O	Widget	Shift+Alt+P
	Import Data Source	Ctrl+Alt+O		

 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:



	Publish Dashboard		-
Category	Self Service		~
Dashboard name	GlobalTeamWorkload_SHW		
Description			
Version Comment			
Mark as favorite			
Mark as public 🦼	8		
Authentication		Publish	Cano

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

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Dashboard has been successfully publi view it in the browser?	ished. Do you want to		
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	Total Open Calls	My Calls	Total Active Tasks
Global Team Workload	d		

- 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):

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	Region	+	10248 VINET				5 7/4/1996 12:00 AM		8/1/1996 12:00 AM		7/16/199
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		+		т	CustomerID	Ŧ	EmployeeID	٣	OrderDate		RequiredDate 8/1/1996 12:00 AM		Shipp
	Order Subtotals	+			CustomerID INET	T			7/4/1996 12:00 AM	1	RequiredDate 8/1/1995 12:00 AN 8/1/1996 12:00 AN	4	Shipp 7/16/1996
	Order Subtotals Orders Qry	+ +		T 10248 V	CustomerID INET INET	T		5		i i i i i i i i i i i i i i i i i i i	8/1/1996 12:00 AN	л л	Shipp



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.

				Filter	5				×
×	OrderDate	×	Date	~	Date Options	~	TOP 'N'		
+ Ad	dd							pdate	Close

3. Remove unused columns

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

De	tails	8
۲	122 OrderiD	
٢	CustomeriD	
•	EmployeeID	
۲	🛗 OrderDate	
9b	🛗 RequiredDate	
ø	1 ShippedDate	
ø	🗂 ShipVia	
ø	🚥 Freight	
۲	C ShipName	

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.

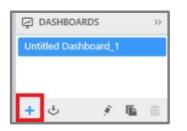


5. Avoid changing datatype

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.

Co	lumn(s)		
	CustomerID	٥	×
	Sum(UnitPrice)	٥	×
-			

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 <u>info@alemba.com.</u>