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Getting Started Creating Dashboards

BusinessObjects XI Release 2

Windows



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Manual abstract:

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About this tutorial About this tutorial The tutorial was written for people who want to install Dashboard Manager and get started building corporate
dashboards. It gives a brief overview of how to: . . . install and configure the framework for the performance management products create the metrics used in
creating analytics create corporate dashboards with analytics For more in-depth training on performance management products, go to [http://
www.businessobjects.com/services/training/](http://www.businessobjects.com/services/training/) We currently have courses on Dashboard Manager and Performance Manager that are aimed at metric and
dashboard designers. We also have a self-paced, simulation-based course for dashboard consumers, called Performance Management Essentials. In the
future, we will also have several webinars that focus on particular aspects of Performance Management. What are the performance management products?
Business Objects performance management products are packaged analytic applications that allow organizations to build custom analytic applications that
meet their specific requirements. They consist of an integrated application or dashboard builder, a catalog of analytic templates, and integrated analytic
engines.
The analytic engines provide the processing power to analyze data in a wide range of business areas. This information can easily be delivered to dashboard
interfaces for a rapid understanding of the status of the business. What is Dashboard Manager? Dashboard Manager is the performance management product
that allows you to create dashboards that provide visibility to your business activities across your organization. Dashboard Manager offers metrics, alerting
and dashboard management capabilities to help your organization monitor and understand business activities. 8 Getting Started Creating Dashboards What
does this tutorial cover? What does this tutorial cover? The president of a small electronics distributing company with overseas customers wants to track how
prices evolve with comparison to costs over a period of several months.



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She wants to see a dashboard displaying the average unit cost compared with the average unit price, and the sum of the unit costs compared with the sum of the unit prices. You are responsible for creating dashboards in this company. In this tutorial you create two analytics that are visual representations of the data from your company's database, place these analytics on a dashboard, and make the dashboard available to your boss. The two analytics are: · · Interactive Metric Trend, or IMT, which shows the evolution of the average unit price and the average unit cost over a period of several months Speedometer, which displays the average unit cost between two data thresholds Then you create an alert on the data to inform the president when the average unit cost exceeds a specified limit, \$275. Lastly, you create a goal analytic that displays the metrics you created in comparison to a goal.

This tutorial takes you through all the necessary steps to get started building dashboards. As a prerequisite, you must have already: · · · · installed BusinessObjects XI Release 2 configured Web Intelligence created users, including one user, President, who has view rights only to the dashboards and analytics in the Performance Management folder installed the performance management framework with Dashboard Manager and Performance Manager You must have an excellent understanding of BusinessObjects XI and be familiar with creating universes in Designer. You must also have access to Designer with a network connection to the machine on which you installed the performance management products if it is not on the same machine. For detailed instructions on creating users and allocating rights in BusinessObjects, refer to the BusinessObjectsXI Release 2 Administrator's Guide. Getting Started Creating Dashboards 9 What does this tutorial cover? This tutorial is made up of six lessons: Lesson 1 Step Creating the universe using the demo database AFDEMO_Data.mdf Learn how to... 2 Configuring the installation 3 4 Creating metrics Building a dashboard · · · · · · · · · · Create a database connection Create a simple universe using Designer Export the universe Create the repository Add the universe Create and add the calendar Create a metric from a universe Build a dashboard in Dashboard Builder. Create an Interactive Metric Trend analytic and save it to the dashboard.

Create and save a speedometer analytic and add it to the dashboard. Refresh the Interactive Metric Trend analytic. Create a rule based on this refresh and send an alert. Set a target on a metric with tolerance levels above and below the target. Add this goal analytic to your dashrs screen is displayed. You do not modify these parameters in this tutorial. 7. Click Next. 18 Getting Started Creating Dashboards Creating the Universe Creating the database connection 1 The Custom Parameters screen opens. You do not modify the default parameters in this tutorial.

8. Click Finish. Getting Started Creating Dashboards 19 1 Creating the Universe Designing the universe The New Connection Wizard closes and the new connection appears in the Universe Parameters dialog box. 9. Click OK.

The dialog box closes and the Designer window opens. Designing the universe At this point you start to design the universe. Since this is a very simple universe you use only four tables from the database: · · · · Customers Orders OrderDetails Products The OrderDetails table contains price and quantity information, whereas the Orders table contains date information. This information is required for creating queries. The first step in creating a universe is to select the tables.

20 Getting Started Creating Dashboards Creating the Universe Designing the universe 1 Selecting the tables 1. 2. To select the tables: Right-click inside the blank page in the Designer window. From the menu that appears, click Tables. The Table Browser opens. 3. Double-click the following tables: Customers, Orders, OrderDetails, and Products. The tables appear in the right pane of the Designer window as shown below. 4. Close the Table Browser.

Getting Started Creating Dashboards 21 1 Creating the Universe Designing the universe Creating the joins The next step is to create the join between the two tables from the OrderID field. 1. To create the join: Click OrderID in the Orders table then drag the cursor to OrderID in the OrderDetails table. A line appears between the two items. 2. Double-click the line. The Edit Join dialog box opens. 3. Click Cardinality, then click Detect. Designer detects the cardinality and creates the join.

22 Getting Started Creating Dashboards Creating the Universe Designing the universe 1 A one-to-many join is created between the two tables. The three-prongs on the Orders side of the join indicate the many aspect of the join. 4. 5. 6.

7. Click CustomerID in the Customer table and drag the cursor to CustomerID in the Orders table. Double-click the join and detect the cardinality as you did in step 3. Click ProductID in the OrderDetails table and drag the cursor to ProductID in the Products table. Double-click the join and detect the cardinality as you did in step 3.

The three joins you created are one-to-many joins that join one row from one table to several rows in another table. Creating classes The next step is to create new classes. A class is a container of objects. A class is the equivalent of a folder in the Windows environment. You create classes to house objects that have a common purpose in the universe. In this step you create the class folder and put objects in it. 1. 2. 3. 4.

To create classes: Right-click inside the left pane and select Class from the menu. The Edit Properties dialog box opens to the Definition tab. In the Class Name type a name for the class, demo universe. Click OK. In the right pane, highlight the Unit Price field in the OrderDetails table and drag your cursor to the class folder that you just created in the left pane. Getting Started Creating Dashboards 23 1 Creating the Universe Designing the universe The object appears as a dimension in the object folder. 5. 6. Do the same for UnitSales, NetSales, Cost, UnitCost, and Quantity. Do the same for CompanyName in the Customers table and ProductName in the Products table.

Setting the object properties Once you have created the class folder and have put objects in it, you set the properties of each object. 1. 2. To set the properties Double-click the object Quantity. The Edit Properties dialog box opens.

Click the Definition tab. By default, the name of the object, Quantity, and the type, Number, appear in the appropriate boxes. 3. 4. Click the Properties tab. Under Qualification select Measure. The dialog box changes to display a box in which you choose how the measure is projected when aggregated.



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By default, Sum appears in the Function box. Leave this value. By default Associate a List of Values is selected. 24 Getting Started Creating Dashboards Creating the Universe Designing the universe 1 Leave the default values as they appear. 5. 6. Click Apply, then click OK. Repeat steps 1 to 5 for: Unitcost, Cost, Netsales, Unitsales, and Unitprice.

Setting the number format Because quantity, unit price, and unit cost all represent numeric values, you need to set the number format for each measure. 1. 2. To set the number format Press the Shift key and select the measures UnitCost, Cost, Netsales, Unitsales, and Unitprice Right-click the measures and select Object Format from the menu. Getting Started Creating Dashboards 25 1 Creating the Universe Designing the universe The Object Format dialog box opens. 3. 4. 5. 6. 7.

8. 9. Click the Number tab. Under Category, select Currency. Under Format select the first dollar format.

Click OK. Right-click the Quantity measure and select Object Format from the menu. From the Number tab, under Category, select Number and under Format select #,##0. Click OK. Creating the Where restriction on the measure In this step you create a Where restriction on the measure.

You create a join that compares the table to itself. This is called a self-join. Using the Where restriction forces the join to the date restriction. 26 Getting Started Creating Dashboards Creating the Universe Designing the universe 1 1. To create the Where restriction For each measure: Quantity, Unitcost, Cost, Netsales, Unitsales, and Unitprice, double-click the measure. The Edit Properties dialog box opens. In the Where box, enter the following: Orders.OrderDate between @Prompt('BEGIN_DATE', 'D', ,mono,free) AND @Prompt('END_DATE', 'D', ,mono,free) 2. Note: Business Objects recommends that you copy this clause to avoid errors. 3.

Click Parse to check the SQL. The following message appears on your screen: Parsing is OK. 4. Click OK twice. Getting Started Creating Dashboards 27 1 Creating the Universe Designing the universe 5. Click Save. Your universe now looks like this: 6. Click the Save icon to save the universe. Note: For more information on the complexities of the self join refer to the Universes chapter in the Performance Management Administrator's Guide. For detailed information on creating universes refer to the BusinessObjects Designer's Guide.

28 Getting Started Creating Dashboards Creating the Universe Exporting the Universe 1 Exporting the Universe After you have created the Where restriction on the measures and have checked the parsing, you are ready to export the universe. Exporting the universe makes it available to use with Dashboard Manager. 1. To export the universe: From the main menu select File > Export. The Export Universe dialog box opens.

2. 3. 4. 5. Click Browse to locate the folder that corresponds to the domain server to which you want to export your universe.

Select Everyone, which is the group to which you assign the universe. Select the universe that you want to export, in this case demo universe. Click OK.

Getting Started Creating Dashboards 29 1 Creating the Universe To learn more The universe is successfully exported. Congratulations. You have successfully created and exported a universe. In the next lesson you learn how to configure your performance management setup and to add the universe that you just created to the list of available universes. Now you can quit Designer. To learn more To learn more about creating the metric universe, such as creating preaggregated measures and filters, you can enroll in BusinessObjects Dashboard Manager XI: Designing Dashboards. This course is available as classroom training and as eLearning.

For details, go to <http://www.businessobjects.com/services/training/> 30 Getting Started Creating Dashboards Getting Started Creating Dashboards Configuring Your Installation lesson 2 Configuring Your Installation Objective of this lesson Objective of this lesson In this lesson you learn how to perform the basic configuration tasks that are indispensable for using Dashboard Manager. These tasks are: setting-up the repository creating the target database connection adding the universe creating and adding the calendar Before you begin... Before you begin, go to the Setup Information Page, the starting point of postinstallation deployment. From this page you define the target connection and create the system tables for your performance management products. 1. To access the Setup Information Page Do one of the following: . . Start InfoView Java via the Start menu.

In the Address Bar of your browser, enter the URL for your performance management products. The Log On page opens. 32 Getting Started Creating Dashboards Configuring Your Installation Objective of this lesson 2 2. Enter the following information: . . . 3. System: the name of the server on which your performance management products are installed Username: your user name.

The default user name is Administrator. Password: your password. The default is no password. Select the Authentication that was indicated when the product was installed. BusinessObjects XI opens to the InfoView home page.

Click the performance management icon. 4. The Performance Management page opens. 5. Click the Setup button on the services bar. The Setup Information Page opens. While this tutorial does not cover all the parameters that you set from the setup, you may want to take a few moments to read the information contained on this page. Getting Started Creating Dashboards 33 2 Configuring Your Installation Setting up the repository Setting up the repository Click the System Setup tab. By default the Repository page opens. The repository page contains all information pertaining to the CMS and to the repository.

If this is a new installation you must create the repository. By default, the CMS Name, and the Authentication are already entered in the appropriate boxes.

The CMS, or Central Management Server, is the server on which your performance management products are installed. 34 Getting Started Creating Dashboards Configuring Your Installation Setting up the repository 2 Take a moment to check that the repository has been set up correctly. If the boxes under Repository Information are blank, you must set up the repository. If your installation was previously configured, you do not have to set up the repository. In this case, you may want to click Check to verify that the server is responding. The system tables management section of the Repository page lets you know if the system tables have been installed. The system tables store information that is central to the application. If an earlier version of the product has been installed, the module detects it and possibly suggests an upgrade.



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If the repository is up-to-date, you can view the options that were used during its creation. Getting Started Creating Dashboards 35 2 Configuring Your Installation Setting up the repository 1. To set up the repository Under Repository Information click Change. The Choose repository connection dialog box opens. 2.

In the Universe Connection box select the name of the universe connection that you created in Designer, demo connection. When you select the universe connection, the Database Engine, Target Database, and User Name boxes are completed by default as follows: . . . 3. Database Engine: MS SQL Server Target Database: AFDEMO User name: the default entry, sa or the user name you entered when you installed the database engine Click OK. The dialog box closes. 36 Getting Started Creating Dashboards Configuring Your Installation Setting up the repository 2 4.

Under Repository Information click Check to make sure the database connection is working. A message informs you that the server is responding. 5. Click OK. If the system tables have not been created, the Setup Repository dialog box opens. In the next steps you create the system tables. Getting Started Creating Dashboards 37 2 Configuring Your Installation Setting up the repository 6. Leave the default values, then click Next. The View SQL page of the dialog box opens. This page lists the SQL to generate.

7. 8. Click Execute. Setup executes the SQL. 38 Getting Started Creating Dashboards Configuring Your Installation Adding the universe 2 When the SQL has been generated a message appears on your screen and the system tables management section of the page changes to inform you that the repository is up-to-date. 9. Click OK. You return to the Repository page. Adding the universe You define, connect, and edit universes from the Universe page under the System Setup tab. There can be multiple universes connected to the same database.

In this step you add the universe that you created in Designer. 1. To add the universe: Click Universes. Getting Started Creating Dashboards 39 2 Configuring Your Installation Adding the universe The Universe Definition page opens. 2.

Click Add Universe. The Add Universe dialog box opens. 3. Select demo universe from the Measure Universe list. As you make a selection the name of the universe and the domain in which it is located appear in the boxes.

4. Click OK. 40 Getting Started Creating Dashboards Configuring Your Installation Adding the universe 2 The demo universe is added to the list of available universes. 5. Highlight the demo universe that you just added. The Update button is activated. Getting Started Creating Dashboards 41 2 Configuring Your Installation Adding the universe 6. Click Update. Since you have not yet created metrics on your universe, there are no metrics to update, therefore, it is not necessary to select Update Metrics and Control Charts Definitions. The lower part of the screen displays the universe content.

7. Click Measures and Dimensions. The objects that you created in the demo universe are displayed under the demo universe folder. As you highlight each of the measures the corresponding SQL code appears in the SQL box. You can see the Where clause that you entered in Designer. 42 Getting Started Creating Dashboards Configuring Your Installation Adding a calendar 2 Adding a calendar The next step is to make sure that you have an appropriate calendar. Both metrics, which you learn to create in Lesson 3, and Goals, which you learn to create in Lesson 6, are based on a specific time period. When you create metrics and goals you associate them to a calendar. Several demonstration calendars are delivered with the installation of your performance management products. If you created the repository with the AFDEMO target database, which you did in this tutorial, you can view these calendars.

Before you add a new calendar, take a look at the existing ones. 1. 2. To view the calendars Click the Time Config tab. Click Calendar.

A list of available calendars appears on the page. Take a moment to examine the calendar span and parameters of the available calendars. The date values in the demo database that you used to create your universe cover a period of nearly five years, starting in January of 2000. While you could use one of the existing calendars, for the purpose of this tutorial you create a new calendar. Data is available for nearly every date over the entire period, however, to ensure a clear display of the data points in the Interactive Metric Trend (IMT) graph that you create later in this tutorial you create a monthly calendar. Getting Started Creating Dashboards 43 2 Configuring Your Installation Adding a calendar 1. To add the calendar Click Add. The Add a Calendar dialog box appears. 2. 3. 4. 5. 6. 7. Enter the name of the calendar, demo universe.

Enter a description, for example, monthly calendar for AFDEMO. Under Type of Periods, select Calendar. In the Interval box select Monthly. Under Period Display, select First day of period, and in the Format box select the appropriate format for your computer. Under Calendar Span, select the values: . . . 8.

From Jan 2000 To Dec 2004 Click OK. 44 Getting Started Creating Dashboards Configuring Your Installation Adding a calendar 2 The calendar demo universe appears in the list of available calendars. At this point you are ready to create metrics on your universe. Click the Performance Management button to exit the Setup page. For more information about any of the tabs accessed from the System Setup, refer to the help on the Setup page.

Getting Started Creating Dashboards 45 2 Configuring Your Installation Adding a calendar 46 Getting Started Creating Dashboards Getting Started Creating Dashboards Creating Metrics lesson 3 Creating Metrics Objective of this lesson Objective of this lesson You want to compare the average unit price of your products with their average unit cost. In this lesson you create two universe metrics, Average Unitcost and Average Unitprice from the universe that you created in Designer. Then, in the next lesson, you use the metrics to create an Interactive Metric Trends analytic, which is the visual representation of the data that is generated by the metrics. Before you begin..

. Before you begin, click the Dashboard Manager tab from the Performance Management page. The Dashboard Manager page contains several submenus that correspond to tasks that you perform when creating dashboards. In this tutorial you use the following sub-menus: What's a metric? Metrics Rules Dashboard Builder Create New Analytic A metric is the measure of actual performance. A metric is defined using objects in the universe, and is usually made up of the following: . . . a measure a filter a date restriction By using metrics, you can track actual performance and compare it to a goal and you can detect trends.



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Metrics are most commonly used in organizations as Key Performance Indicators (KPIs) to monitor critical business areas. What's an analytic? An analytic is the visual representation of your data. In this tutorial you apply your metric data to the pre-built analytic templates delivered with Dashboard Manager. 48 Getting Started Creating Dashboards Creating Metrics Creating a new metric 3 What's an IMT, or Interactive Metric Trends graph? An IMT is a graph that lets you analyze trends in data. In this lesson you create an IMT that compares the average unit cost to the average unit price of the products that you are selling. You can see, at a glance, if an increase in cost is compensated by an increase in price. What's a speedometer? A speedometer is a gauge that displays data in a given range based on predetermined values. Creating a new metric In this step you use Dashboard Manager to create metrics using the demo universe that you created in Designer. First you create two metrics using the Unitcost and Unitsales measures: · · the average of unit cost average of unit price Then you create a third metric, the average of cost, which is the average of total cost over the same period. You use these metrics in the next lesson to create analytics that you place on a dashboard.

Creating the Average of Unitcost and Average of Unitprice metrics You create metrics in the Create Metric dialog box. 1. 2. To get started creating metrics: From the Dashboard Manager tab, click Metrics. Under Available Metrics locate demo universe. Getting Started Creating Dashboards 49 3 Creating Metrics Creating a new metric 3. Click Add and select New Metric from the list. The Create Metric dialog box opens to the first of three pages on which you create the metric. On the left side of the Measure page, under Select a measure, the measure objects that you created in Designer are displayed. On the right side, a list of available aggregate functions is displayed.

Begin by creating a metric for the average unit cost. 1. 2. To create the metric for the average of unit cost: Highlight the measure Unitcost. Highlight the aggregate function Average.

50 Getting Started Creating Dashboards Creating Metrics Creating a new metric 3 3. Click Next. The dialog box changes to display the Filters page. Only one filter is available, None. 4.

Highlight None, then click Next. The Create Metric dialog box changes once again to display the Attributes page. By default, Average of Unitcost appears as the metric name. 5. In the Calculation interval box select demo universe. Leave the default values under: · · · 6. Refresh type Storage options Parameters Click the calendar icon under Metric History, then select the start date Jan 2000. Getting Started Creating Dashboards 51 3 Creating Metrics Creating a new metric 7. 8. Click Stop metric calculation and select the stop date, Dec 2001.

Click Finish. The metric Avg of Unitcost is added to the list of available metrics. 9. Click Refresh and confirm the operation. When the metric is refreshed the Metric history section of the dialog box changes to display the Start, Last, and Stop dates of the metric as shown below. Note: If you forget to click Refresh the data does not display properly when you create your analytic. Repeat the above procedure to create a second metric, Avg of Unitprice. When you finish, the metrics appear in the list of available metrics as shown below. 52 Getting Started Creating Dashboards Creating Metrics Creating a new metric 3 Creating the Average of Cost metric 1. 2.

3. 4. 5. 6. 7.

To create the Average of Cost metric On the Metrics page under Available Metrics locate demo universe. Click Add, then select New Metric. In the Create Metric dialog box, select Cost and the aggregate function Average. Click Next. On the Filters page, highlight None, then click Next.

In the Attributes page select the calculation interval, demo universe. Under Metric history, select: · · the start date of Jan 2000 the end date Dec 2001 8. Click Finish. Getting Started Creating Dashboards 53 3 Creating Metrics To learn more The new metric, Avg of Cost, appears in the list of metrics under demo universe. 9. Refresh the metric. You have created three metrics that you are going to use to create analytics to use on your dashboard. @@@@Dimensions are used to create sliced metrics. @@@@This course is available as classroom training and as eLearning. @@In this lesson you: 1.

2. 3. 4. Build the empty dashboard. Create an analytic using the metrics you created in the last lesson. Add your analytic to the dashboard. @@The builder provides a hierarchical view of the dashboards. @@1. To create the dashboard: Click Dashboard Builder. The Dashboard Builder page opens.

The available applications appear in the left pane. 2. @@@@Click Save. The Save a new Corporate Dashboard dialog box opens. 5.

@@@@@@@@Now you are ready to create your analytic. @@@@The Create New Analytic page opens. @@By default the page opens to the Dashboard Analytics. 2. 3.

4. 5. Click Interactive Metric Trends. The page changes to display the various data and graph options. @@Click Add. The Add a Metric dialog box opens. Select demo universe. 6. @@@@Do not modify the default values on the page. @@2.

To edit the chart display options Click Graph and Legend. The page changes to display the various options available. Under Title and Legend options click Display Text. 60 Getting Started Creating Dashboards Creating a Corporate Dashboard Using analytics in your dashboards 4 3. 4. In the box, type a title for your analytic: Avg. Unit Cost vs. Avg. Unit Price. Under Legend select Show Legend.

5. 6. Expand Display Mode Select: · · Hide Selected Metrics panel Hide Graph Options panel. 7. Click OK.

Getting Started Creating Dashboards 61 4 Creating a Corporate Dashboard Using analytics in your dashboards The Interactive Metric Trends (IMT) analytic is displayed. Each data point corresponds to a value that is calculated from the data in the OrderDetails table that you used when you created the demo universe in Designer. Take a few minutes to highlight the data points. As you place your cursor over each data point, the date and the dollar value of your data on that date appears on your screen. When you added the demo universe calendar in Lesson 3, you selected a monthly time interval.

The data intervals are represented by vertical black lines on the X axis of your IMT (Interactive Metric Trend). 62 Getting Started Creating Dashboards Creating a Corporate Dashboard Using analytics in your dashboards 4 Before doing anything else, save your analytic! 1. To save your analytic Click Save As. The Save an Analytic page opens. 2. Under General, enter a title, demo imt. Getting Started Creating Dashboards 63 4 Creating a Corporate Dashboard Adding the analytic to your dashboard 3.



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Enter a description, Avg unit cost to avg unit price Jan 2000 to Dec 2001. In Location, expand Public Folders, and highlight the Performance Management folder. In Categories, expand Corporate Categories and select Performance Management. Click OK. Your analytic is saved successfully. Now you can close the analytic. Adding the analytic to your dashboard In this step you add the analytic that you created, demo imt, to the dashboard that you created earlier in this lesson, demo dashboard. Because you saved your dashboard and your Interactive Metric Trend analytic to the Performance Management folder, they were saved in the Public Folders in InfoView. 1. 2.

To add the analytic to your dashboard: Click InfoView. Under Public Folders, click the Performance Management folder. Both the demo imt and the demo dashboard appear in the Performance Management folder. 3. 4.

Click the demo dashboard title. The empty dashboard opens. Click Customize. The Content and Layout page opens to the Content tab. 64 Getting Started Creating Dashboards Creating a Corporate Dashboard Adding the analytic to your dashboard 4 5.

Under Corporate Analytics, expand the Performance Management folder and locate the analytic you created, demo imt. 6. 7. Drag demo imt to the right pane. The IMT opens in its window Click the lower right corner of the IMT window and resize to fit the IMT to your dashboard. At this point you can click the edit icon to edit the content and layout of the analytic, however you do not edit the IMT in this tutorial. 8. Click Apply & Close. The page closes and you return to your dashboard. Now you can view the demo dashboard with the analytic demo imt.

1. 2. To view the dashboard In InfoView, open the Performance Management folder. Select demo dashboard and click to open it. Getting Started Creating Dashboards 65 4 Creating a Corporate Dashboard Adding the analytic to your dashboard The demo analytic appears on the demo dashboard. The IMT shows the average unit cost and the average unit price over a period of 24 months. You can see that the trend for both shifted in April 2001 and stayed relatively stable until the end of the year. 66 Getting Started Creating Dashboards Creating a Corporate Dashboard Adding a second analytic to your dashboard 4 Adding a second analytic to your dashboard In this section you add a second analytic, a speedometer, to your dashboard. Your boss wants to be able to see at a glance if the average total cost of all products sold each month is within an acceptable range. A speedometer is an excellent means of displaying this information because it shows the value of the data at a given point in time on a color-coded background.

Creating and adding the speedometer to your dashboard When you create the speedometer analytic first you create the space for the analytic on your dashboard and then you select the metrics to use. 1. 2. To create space on a dashboard Open the demo dashboard in InfoView. In the dashboard click Customize.

The page changes to display the Content and Layout tabs on the left. Getting Started Creating Dashboards 67 4 Creating a Corporate Dashboard Adding a second analytic to your dashboard 3. Expand the New Analytic folder and, from that folder, select Speedometer. 68 Getting Started Creating Dashboards Creating a Corporate Dashboard Adding a second analytic to your dashboard 4 4. Drag the Speedometer icon to the right side of the page below demo imt. When you release your mouse button the Speedometer window opens, but it is empty. The following message is displayed: Metric does not exist or there are no values for the selected metric. Getting Started Creating Dashboards 69 4 Creating a Corporate Dashboard Adding a second analytic to your dashboard 1. To create the Speedometer analytic Click the Edit icon on the title bar of the Speedometer window. The page changes to display the Content and Layout page. 2. Expand the Select Data to Display option. 3. Under Select Data to Display select Metric Data. The Metric Selection dialog box opens.

70 Getting Started Creating Dashboards Creating a Corporate Dashboard Adding a second analytic to your dashboard 4 4. Click Select Metric. The Metric Selection dialog box opens. 5. 6. Select the demo universe. From the list of available metrics expand Avg of Cost and highlight the yellow filter, None. Do not modify the Time Window. Expand Render Style. The Speedometer is selected by default.

In this tutorial you do not modify the other graph and navigation options. Note, however, that the Graph Properties section of the content page contains two options, Boundaries and Zone that allow you to format the speedometer. 7. 8. Click OK.

You return to the Content and Layout page. Getting Started Creating Dashboards 71 4 Creating a Corporate Dashboard Adding a second analytic to your dashboard The following speedometer appears on the Content page. 9. Click Apply & Close. You return to your demo dashboard.

Now take a look at the speedometer on your dashboard. The needle points to the value on 12/1/01, \$13,832.00 which is in the orange or caution zone. By using your cursor to slide the pointer on the slider below the speedometer, you can view values on different dates. For example, the average of total costs on 1/1/01 is \$12,896.00, which lies in the acceptable zone. On the other hand, on 8/1/01, average of total costs was \$15,252.00 which was in the red or unacceptable zone. 72 Getting Started Creating Dashboards Creating a Corporate Dashboard Viewing what you have accomplished 4 Viewing what you have accomplished Now close the dashboard and return to InfoView to take a look at what you have completed. Expand the Public and the Performance Management folders.

In the Performance Management folder you find the: · · demo dashboard demo IMT analytic In the next lesson you learn how to create a rule on your Interactive Metric Trend and create an alert that appears on the dashboard along with the IMT and the Speedometer. Getting Started Creating Dashboards 73 4 Creating a Corporate Dashboard To learn more To learn more To learn about... · · · · · and Query-based analytics Statistical analytics Pareto Chart analytics Map and Metric Tree analytics Analytics catalogue Securing corporate dashboards Guiding dashboard navigation Creating personal dashboards · · · you can enroll in BusinessObjects Dashboard Manager XI: Designing Dashboards. This course is available as classroom training and as eLearning. For details, go to <http://www.businessobjects.com/services/training/> 74 Getting Started Creating Dashboards Getting Started Creating Dashboards Creating Rules and Alerts lesson 5

Creating Rules and Alerts Objective of this lesson Objective of this lesson In this lesson you learn how to create a rule that sends an alert to your dashboard when the value of the specified data is higher than a specified value.



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In this lesson you learn how to: · · add the alert analytic to your dashboard create and run a basic rule Before you begin...

Before you begin take another look at the data points displayed on your demo dashboard. The average unit cost of your products was relatively stable throughout 2000 until April 2001 when the average unit cost dropped approximately \$70. The average unit price also dropped proportionately to the average unit cost. The president of your company wants to be notified if and when the average unit cost exceeds \$275. You create a rule to meet this requirement. Assume that the current month is April 2002. What are Rules and Alerts? A rule is a method of telling Dashboard Manager what to do if a specific condition is met. A rule: · · · is triggered by an event evaluates a condition raises an action if the condition is verified The alerts analytic is a list of alerts that have been created by you or by other dashboard designers. It allows you to view all the alerts that have been created. The creation of an alert is an action that is executed by the rules engine. When you create a rule to raise an alert you determine if the scope of the alert is private, available to you alone, or public, that is, available to all. is an analytic that informs the user of any major changes that occur in the data. Rules and alerts automate the process of detecting and interpreting change, and delivering relevant analysis to key individuals or operational systems. You can use rules to track large changes, generate lists, and automate basic procedures like refreshing a report. 76 Getting Started Creating Dashboards Creating Rules and Alerts Creating the alerts analytic 5 The Rules page allows you to create these rules.

You can create a new rule and define events, a condition, and actions for the rule, edit and delete an existing rule, duplicate a rule, and execute a rule. Creating the alerts analytic The rule that you create in this chapter alerts you if the average unit cost exceeds \$275. In order to view this alert you must have the Alerts analytics on your dashboard. First you create the alerts analytic, then you add it to your dashboard, and lastly, you create the rule to raise the alert. You create the alerts analytic from the Create New Analytic page. In Lesson 4 you went directly to this page from the Dashboard Builder in Dashboard Manager. Because you are now in InfoView, you access the Create New Analytic page directly from InfoView. 1. To access the Create New Analytic page From the InfoView home page click New. A list of new options appears as shown below.

Getting Started Creating Dashboards 77 5 Creating Rules and Alerts Creating the alerts analytic 2. Select Analytic from the list. The Create New Analytic page opens in InfoView By default, the page opens to the Dashboard Analytics page. 3. Click Tools from the menu on the left side of the page. 78 Getting Started Creating Dashboards Creating Rules and Alerts Creating the alerts analytic 5 The page changes to display the tools analytics. Now you can create the alerts analytic. 1. To create the Alerts analytic Click the Alerts analytic. The page changes to display available categories for the alerts. Getting Started Creating Dashboards 79 5 Creating Rules and Alerts Creating the alerts analytic 2. Select the category for the information level of alerts. 3. Under Sort by: · · 4. 5. Clear Display only private alerts. Select Display alerts with the same title only once. Click OK. The alert is displayed on the page. Click Save As.

The Save an analytic page opens. 80 Getting Started Creating Dashboards Creating Rules and Alerts Creating the alerts analytic 5 6. 7. Enter a title, demo alert, and save the alert in the Performance Management folder. Close the alert. The Alerts analytic is added to the available analytics under Performance Management. 1. 2. 3. To add the alert to your dashboard In InfoView, locate and open your dashboard, demo dashboard. Click Customize. The page changes to display the Content/Layout page. Expand the Corporate Analytics and the Performance Management folders and locate the alert, demo alert, that you just created. 4. 5.

Select the demo alert and drag it to your dashboard. As you release your mouse button, the alert appears on the dashboard. Click Apply & Close. The alert analytic appears on your dashboard. You have just modified your demo dashboard to include the new alert analytic.

When you create a rule later in this lesson, the alert that you create appears in the list of alerts. Now you are ready to create a rule and an alert on the Average of Unit Cost metric. Getting Started Creating Dashboards 81 5 Creating Rules and Alerts Creating a basic rule Creating a basic rule Typically, rules are created from existing templates that have been designed by the metric designer or by the system administrator. In this example you use the Generic rule: on this event, if a condition is met, do actions. The most common types of events to trigger rules are: · · · Schedule Metric refresh Named event (initiated by an event external to Dashboard Manager) Viewing the available business rules Before you create your first rule, take a look at some of the available business rules. 1. To view business rules In Dashboard Manager, click Rules. The Rules page opens. 82 Getting Started Creating Dashboards Creating Rules and Alerts Creating a basic rule 5 2. Highlight a rule.

The description of the rule appears in the lower pane. In each case, there is an event, a condition, and an action. In some cases the rule includes sending feedback. Adding the new rule You want to create a rule to send an alert if the average unit cost exceeds \$275. 1. To create a new rule on the metric On the Rules page under Available Business Rules click Add. Getting Started Creating Dashboards 83 5 Creating Rules and Alerts Creating a basic rule The Add Rule dialog box opens. 2. 3. 4.

5. Enter the name for the rule, demo rule. Select Activated. Under Scope, select Public, which allows your alert to be viewed by all users. From the Template List select Generic rule.

The description of the rule appears in the dialog box under Rule description. At this point you define each of the components of the rule. Defining the rule components You define the event, the condition, and the action on each rule in a series of dialog boxes. 84 Getting Started Creating Dashboards Creating Rules and Alerts Creating a basic rule 5 1. To define the event Click Events.

The Rule triggering events dialog box opens. 2. Under Type of Events, select metric refresh, then click the arrows to move the event to the right part of the dialog box. The Metric Selection dialog box opens. Select demo universe. Under Available metrics, click Avg of Unitcost, then highlight the yellow filter, None.



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3. 4. Getting Started Creating Dashboards 85 5 Creating Rules and Alerts Creating a basic rule 5. Click the arrow button.

Average of Unitcost appears in the Selected metrics side of the dialog box 6. Click OK. You return to the Add Rule dialog box. Now you define the condition. 1. To define the condition In the Add Rule dialog box click Condition. The Condition Formula Editor opens. The box under Formula is blank. You enter the formula later in this procedure. Under Variables, the metric that you selected is displayed as a variable: metric1 = Average of Unitcost.

Under Functions and Operators are a number of folders that contain the functions and operators that you may use in Dashboard Manager. 2. Under Formula, enter the following: 86 Getting Started Creating Dashboards Creating Rules and Alerts Creating a basic rule 5 METRICVALUE(metric1.ID,0) > 275 3. Click Parse to check the syntax of the formula.

A message box appears to tell you that the parsing is OK. Do not enter dates. 4. 5. Click OK in the message box.

Click OK in the dialog box. You return to the Add Rule dialog box. The last step is to select the action that you want executed. Getting Started Creating Dashboards 87 5 Creating Rules and Alerts Creating a basic rule 1. 2. 3. To select the action Click Actions. The Rules Actions dialog box opens. Under Action types in the Rules Actions dialog box, select raise an alert. The Alert definition dialog box opens.

Complete the Alert definition dialog box as follows: Under Alert title Scope Level Alert text Category Alert expiration Type or select Unit cost too high Public, which makes the alert available to everyone Information The average unit cost exceeds \$275 Leave blank Never Associated Report Leave blank 4. Click OK. You return to the Rules Actions dialog box. Under Actions to execute the following appears: create the alert: Unit cost too high. 5. Click OK, then click OK in the Add Rule dialog box. The rule you just created, demo rule, appears in the list of available business rules. Now test the rule 1. To test the rule Highlight the rule, then click Run. The message box Success appears on your screen.

88 Getting Started Creating Dashboards Creating Rules and Alerts Updating metrics and updating the analytic demo imt 5 This message means that your test has run successfully. 2. Click OK. Note: An alert is sent only when the condition set in the alert is met. It is possible for your test to run successfully without an alert being sent.

Updating metrics and updating the analytic demo imt For this example you need new data. You update your metrics for Average Unitprice and Average Unitcost. 1. 2. 3.

To update your metrics Click Dashboard Manager > Metrics. Under Available Metrics select demo universe. Highlight Avg of Unitcost, then click Purge. The Metric Purge dialog box opens. 4. 5. 6. 7. 8. Select Purge all periods, then click OK.

All the data is deleted, or purged, from the metric. Highlight the yellow filter, None under Avg of Unitcost Under Metric history, set the value for Stop metric calculation to: Apr 2002. Click Apply. Click Refresh, then confirm. Getting Started Creating Dashboards 89 5 Creating Rules and Alerts Viewing what you have done The data is refreshed. Note the change in the Metric history box. The start date is unchanged, but the last date and the stop date are now set to 4/01/02. 9. Repeat steps 2 to 8 for Avg of Unitprice. You have updated the period of two new metrics.

These updated metrics are automatically applied to your IMT, both as a standalone analytic and on the demo dashboard. Viewing what you have done Now return to InfoView to take a look at your dashboard. 1. 2. Locate and open the demo dashboard.

In the title bar of demo imt click the expand icon. The IMT expands in InfoView 3. Click the Refresh icon. The IMT changes to display the new metrics. 4. Click Save then click the Close icon. 90 Getting Started Creating Dashboards Creating Rules and Alerts Viewing what you have done 5 The IMT Examine the analytic demo imt. Data points have been added to show the average unit cost and average unit price for the additional months. Place your cursor over the last data point for Average of unitcost. The tooltip displays the average unit cost on 4/1/02 as \$433.00 which, indeed, does exceed the limit of \$275. Getting Started Creating Dashboards 91 5 Creating Rules and Alerts Viewing what you have done The Alert Now look at the Alerts analytic. You see the alert you created: Unit cost too high. Click on the alert. The alert opens and you can read the text you entered: The average unit cost exceeds \$275.

If the average unit cost had been under \$275, the rule would have run without meeting the condition, but you would not have received the alert on the dashboard. The Speedometer Scroll down in your dashboard to the speedometer. The speedometer has not changed. When you updated metrics earlier in this lesson, you updated the metrics for average unit cost and average unit price, but you did not update the metric average of cost, which was used in creating the speedometer. 92 Getting Started Creating Dashboards Creating Rules and Alerts To learn more 5 Return to Dashboard Manager and update the average of cost metric to April 2002. Remember to refresh the metric after you have purged it. When you return to InfoView, your speedometer looks like this: Note that the average cost on 4/1/02 is over \$16,000 and is well in the red, or unacceptable, zone! To learn more To learn more about using variables and creating rules on sliced metrics, you can enroll in BusinessObjects Dashboard Manager XI: Designing Dashboards. This course is available as classroom training and as eLearning. For details, go to <http://www.businessobjects.com/services/training/> Getting Started Creating Dashboards 93 5 Creating Rules and Alerts To learn more 94 Getting Started Creating Dashboards Getting Started Creating Dashboards Adding a Goal lesson 6 Adding a Goal Objective of this lesson Objective of this lesson The objective of this lesson is to create a new metric, average of net sales, and to set target values on this metric by creating a goal analytic. You then add the goal to your dashboard. Before you begin...

You use the performance management module Performance Manager to create goals. To check that Performance Manager has been installed along with Dashboard Manager click the performance management button. The Performance Manager tab indicates that Performance Manager has been installed. What is Performance Manager? Performance Manager is the Business Objects application that helps organizations communicate strategy and manage group decisions. Through setting goals and tracking performance in scorecards, people can focus their efforts, collaborate with others, and follow recommended actions to improve organizational performance.

What's a goal? A goal is the measurement of the achievement of a given metric.



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A goal consists of a target value and, optionally, a tolerance zone. A goal is assigned a goal status based on the performance of its associated metric. When the metric actual value over-performs the target value beyond tolerance, then the goal status is green. If the metric actual value falls within the tolerance range, then the goal status is yellow. If the metric actual value under-performs the target value beyond the tolerance, then the goal status is red. 96 Getting Started Creating Dashboards Adding a Goal Creating the goal 6 Getting started Your company president wants to view the average net sales of the products that your company sells. The net sales are the total sales less the discount, which varies from one order to another. The company's goal for the year 2000 is to increase net sales by three percent per period of one month, however your boss will tolerate underperformance of one percent. In this lesson you create a goal on the metric Average of Netsales for the year 2000.

For this lesson pretend that the current month is August 2000. Create a new metric in Dashboard Manager, Average of Netsales for the period January to August 2000. If you are unsure of how to create the metric, refer to the procedure under "Creating the Average of Unitcost and Average of Unitprice metrics" on page 49. After you have created your metric, you are ready to create your goal. Creating the goal When you create a new goal you set a target and then determine a range in which off-target performance is permitted. This range is called the tolerance zone. You can set either absolute values or percentage values for the upper and lower tolerance levels. You can also choose not to set a tolerance level. You create your goal in three pages of the New Goal dialog box. 1.

To start creating the goal In Performance Manager, click Goals Management. The Goals Management page opens. 2. Under Available Goals, select demo universe. Getting Started Creating Dashboards 97 6 Adding a Goal Creating the goal 3.

Click Add. The New Goal dialog box opens to the first page: Name and Metric. On this page you identify the goal. 4. 5.

Under Goal Info, enter a name for the goal you are creating: average net sales goal. In the Goal Type box select None. Target types are useful as a sort of filing system when you have many goals, however in this tutorial you do not use goal types. 6. 7. 8. Under Metric Info, click Select a Metric. The Select a Metric dialog box opens. Select Avg of Netsales, then click OK. You return to the New Goal dialog box.

Under Goal span, click the calendar icons to select the dates: 98 Getting Started Creating Dashboards Adding a Goal Creating the goal 6 ·· From: Jan 2000 To: Jan 2001 The Name and Metric page looks like this: 9. Click Next. The Auto-fill and Tolerance page of the dialog box opens. On this page you set the numeric parameters of the goal. Remember that your boss wants to see an increase in average net sales of three percent per period with a tolerance level of minus 1%. 1. @@The dialog box changes slightly to allow you to enter values. 2. @@4. 5.

6. 7. For First Value click Use Metric History. The Use Metric history dialog box opens. Next to Use metric values as of, select 1/1/00.

Next to Apply percentage, select 100%, then click OK. @@@@The page changes to display two boxes in which you insert the tolerance levels. 8. 9. Enter 0 in the Upper Tolerance box and 1 in the Lower Tolerance box.

Click Next. The New Goal dialog box opens to the Edit Values page. Editing values Notice that values have been entered for each of the periods that you are tracking. The default values reflect a 3 percent increase per period starting with the value on 1/1/00. By default, Keep auto-filled values is selected. Do not modify these values. Click Finish. Your goal appears on the right side of the Goals Management page. 100 Getting Started Creating Dashboards Adding a Goal Creating the goal 6 Saving the goal 1. 2.

3. 4. 5. 6. To save your goal analytic: Click Save As. The Save an Analytic page opens. Enter title Average net sales. For Refresh, select When opened For Overwrite, select Yes Expand the Public Folders and highlight the Performance Management folder. Click OK. The analytic is saved to the Performance Management folder.

Take a few minutes to examine your goal analytic. For the first three months the increase in average net sales was a little over target, but over the four successive months sales were below target. If your president wants to meet her year-end target, she has to take action now! Getting Started Creating Dashboards 101 6 Adding a Goal Adding the goal to your dashboard Adding the goal to your dashboard The last step is to add the goal to the dashboard. 1. 2.

3. To add a goal to a dashboard In InfoView, open the demo dashboard. Click Customize. The Content and Layout page opens. On the left side of the page, under Corporate Analytics, expand the Performance Management folder and locate the analytic average net sales goal.

4. 5. Select this analytic and drag it to the right side of the page. When you release the mouse button the analytic appears on the page. Click Apply & Close. You return to your dashboard. 102 Getting Started Creating Dashboards Adding a Goal Viewing the company president's dashboard 6 Viewing the company president's dashboard You have created a dashboard for your company president. Take a look at what she sees when she logs on to InfoView. Because she does not have the Performance Management products Dashboard Manager and Performance Manager installed, there are no links or buttons available to access Dashboard Manager or the other Performance Management modules. She does have rights to view, however, certain dashboards and analytics in the Performance Management folder.

For information on setting user access rights, refer to the chapter Controlling User Access in the BusinessObjects XI Administrator's Guide. Getting Started Creating Dashboards 103 6 Adding a Goal Viewing the company president's dashboard 1. To view the dashboard Expand the Public Folders and click the Performance Management folder. A list of available analytics and dashboards appears in the right pane. 2. Click demo dashboard. The dashboard opens in InfoView. The demo dashboard contains the IMT and speedometer analytics that you created as well as the Alerts analytic and the goal. Note that in the Alerts analytic, none of the alerts has been opened. 3.

Click the various alerts and read them. You see both the subject of the alert and the description that you entered as shown here: 104 Getting Started Creating Dashboards Adding a Goal Viewing the company president's dashboard 6 Getting Started Creating Dashboards 105 6 Adding a Goal In conclusion... In conclusion.

.. Congratulations! You have just completed the sixth and last lesson in this Getting Started with Dashboards tutorial.



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