



Your PDF Guides

You can read the recommendations in the user guide, the technical guide or the installation guide for BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1. You'll find the answers to all your questions on the BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 in the user manual (information, specifications, safety advice, size, accessories, etc.). Detailed instructions for use are in the User's Guide.

User manual BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1
User guide BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1
Operating instructions BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1
Instructions for use BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1
Instruction manual BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1

Dashboard Manager User's Guide

Dashboard Manager 6.5.1



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)
<http://yourpdfguides.com/dref/3771460>

Manual abstract:

@@in writing at documentation@businessobjects.com. Business Objects S.A. does not warrant that this document is error free. Copyright © Business Objects S.A. 2005. All rights reserved. @@in the United States and/or other countries.

@@The use, duplication, or disclosure by the U.S. Government is subject to restrictions set forth in subdivision (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at 252.2277013. U.

S. Patent Numbers 5,555,403, 6,247,008 and 6,578,027. 3C1-50-600-01 Patents Part Number Dashboard Manager User's Guide 3 Contents Preface Maximizing Your Information Resources 5 It's in the documentation . . .

.....

.....

.....

.....

..... 6 Reader's comments form . . .

.....

.....

.....

.....

..... 8 Chapter 1 Understanding Dashboard Manager 9 What is Dashboard Manager? . . .

.....

.....

.....

.....

.. 11 Important concepts . . .

.....

.....

.....

.....

.....

..... 14 Login

.....

.....

.....

.....

.....

.....

.....

15 Chapter 2 Navigation within Dashboard Manager 17 Site map for Dashboard Manager

.....

.....

.....

.. 19 Navigating in Dashboard Manager

.....

.....

.....

... 20 Chapter 3 My Dashboard 23 Add/customizing a page

.....

.....

.....

.....

.... 25 Customize an analytic layout

.....

.....

.....

.....

33 Retrieving analytic from inbox

... 153 *Named event*

.....
.....
.....

.....
.....
.....

167 *Chapter 10 Scheduler* 171 *Edit/delete task*

.....
.....
.....
.....

..... 176 *Chapter 11 Metric Analytics* 177 *Trend analysis*

.....
.....
.....

.....
.....
.....

. 178 *Alerts and monitors*

.....
.....
.....
.....

... 194 *Comparison*

.....
.....
.....

.....
.....
.....

. 226 *Deviation*

.....
.....
.....
.....

. 240 *Chapter 12 Statistical Analytics* 245 *Forecasters*

.....
.....

.....
.....
.....

..... 246 *Correlation* .

.....
.....
.....
.....

.....
.....
.....

... 262 *Projection and distribution* ..

.....
.....

.....
.....
..... 266 Chapter 13 Other Analytics 269 Create new analytic

.....
.....
.....
.....
..... 271 Create OLAP documents ...

.....
.....
.....
..... 273 Text/HTML analytic .

.....
.....
.....
..... 276 Navigation list

.....
.....
.....
.....

.....
..... 278 Web page analytic ...

.....
.....
.....
..... 282 Viewer analytic

.....
.....
.....
.....

.....
..... 284 Group analytic

.....
.....
.....
.....

..... 287 Appendix A Glossary of Terms Index 289 293 Contents Maximizing Your Information Resources preface 6 Dashboard Manager User's Guide It's in the documentation Dashboard Manager documentation strives to deliver product information that is rich, convenient, and easy-to-use. Whether you're a novice or experienced user, Dashboard Manager documentation is the place to go for discovering our products, exploring their features, or locating precise information. Product information has been substantially expanded to encompass not only facts about product features but also tips, samples, and troubleshooting instructions. For your convenience, our documentation is available from all products in Acrobat PDF, and print media.

Documentation has been designed first and foremost with speed and ease of navigation in mind. All the information you require is readily available just a few mouse clicks away. The next sections highlight new and key features of our documentation. About this guide This guide describes the various concepts, tasks, and procedures required to use the dashboard manager. This guide covers everything you need to know about dashboard manager. It may not be exactly what you see in the application. The reason being that your system administrator may have created a new application from the start and with a different look and feel. To search for anything specific use the index. Audience This guide is intended for anyone interested in performing simple to complex customer-related segment analysis from any Java-enabled Web browser that is connected to the Internet or a corporate intranet. Online guides User's guides All Dashboard Manager user's guides are available as Acrobat Portable Document Format (PDF) files.

Designed for online reading, PDF files enable you to view, navigate through, or print any of their contents. Maximizing Your Information Resources Dashboard Manager User's Guide 7 From a PDF file, you can search for specific occurrences of a word using the Find command, or navigate to the exact

location of a topic by clicking a crossreference or an entry in the Index or Table of Contents. To open a document, you can select it from the Help menu provided that you have installed the Adobe Reader, version 5.0 on your machine. You can download it for free from Adobe Corporation's web site at: [http://www.](http://www.adobe.com/products/acrobat/readstep.html)

[adobe.com/products/acrobat/readstep.html](http://www.adobe.com/products/acrobat/readstep.html) What to do for more information If you cannot find the information you are looking for, then we encourage you to let us know as soon as you can. Feel free to send us any requests, tips, suggestions, or comments you may have regarding this or other Application Foundation documentation using the Reader's Comment Form at the back of this guide. To search for anything specific use the index.

Below is a list of other Application Foundation guides: · Set Analysis User Guide · Predictive Analysis · Process Analysis User Guide · Performance Manager User Guide · Application Foundation Installation Guide · Application Foundation Configuration Guide It's in the documentation 8 Dashboard Manager User's Guide Reader's comments form Dashboard Manager User's Guide Version 6.5.1 Part Number: 3C1-50-300-01 Your company's name:

_____ Company address: _____ Telephone/fax number: _____
E-mail address: _____ What is your job position? _____ How long have you been using Application Foundation? _____ Business Objects welcomes your comments and suggestions on the quality and usefulness of this publication.



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)
<http://yourpdfguides.com/dref/3771460>

Your input is an important part of the information used for revision. If you find any errors or have any suggestions, please indicate the topic, chapter and page number below: _____

E-mail your comments to: documentationusa@businessobjects.com Mail it to:

Technical Publications Business Objects Americas 3030 Orchard Parkway, San Jose, CA 95134 Maximizing Your Information Resources Understanding Dashboard Manager 1 chapter 10 Dashboard Manager User Guide Overview This chapter helps you understand exactly what Dashboard Manager is, how it is linked with Application Foundation and what you can do with the application. It also highlights some important concepts that you may need to understand before working on the application. Understanding Dashboard Manager Dashboard Manager User Guide 11 What is Dashboard Manager? Dashboard Manager is a rapid application development tool. It builds applications without programming. It is very extensible and can be customized to suit your needs.

It also includes a catalog of predefined analytic techniques that you can adapt as per your needs. Dashboard Manager includes ready-to-use dashboard components that allow easy development and deployment of management dashboards. Dashboard Manager contains a set of powerful analytics which allows you to create your own dashboard or view. Dashboard Manager comes with powerful analytic engines that help customers equip their business users with advanced analytics to make proactive decisions, based on constantly evolving business information. With Dashboard Manager you can add analytics and customize their views to provide personalized business insights. A business rules engine provides automatic real time alerts and actions that operationalize analysis for closed-loop optimization of any business process. Since it has a web interface, Dashboard Manager can be deployed enterprisewide over an intranet or extranet. Using a standard Java-compliant web browser from any internet connection, you can: · analyze customer behavior over time to determine their lifetime value. Analyzing customer behavior over time is often a better indicator of their value than just measuring the value at a given time. · respond in a very focused way to customer behavioral trends, resulting in higher customer retention.

· distribute your analyses to those that need it as trend reports or as a list of individual customers to target in a marketing campaign. What is Dashboard Manager? 12 Dashboard Manager User Guide Customizing Dashboard Manager You can maximize your efficiency by personalizing Dashboard Manager to conform to and even enhance your most visibly changes as you navigate from page to page. You can customize a page to your choice of colors and content. Analytics An analytic is a prebuilt analysis technique for extracting business insight from data. Although an analytic may output to a report, analytics may also provide such varied outputs as alerts, lists, interactive data visualization applets.

My Dashboard My Dashboard refers to the component that is in essence the "management dashboard" customized by individual users to contain analytics of importance to them. This can be the first set of screens that you see when you log into. It is where you take a quick look at what is important for you such as to see if there are any alerts regarding important changes in the behavior of key customer sets that you need to follow up on. My Dashboard can have several pages that allow you to see different levels of information. The customizable interface enables you to build your own portfolio of reports and categories.

Prompts A prompt is a condition that lets you obtain the exact information you need for a particular analytic filtered for that value. Based on the defined prompt you can view the analytic document. A prompt is active when you refresh an analytic. This feature is available for all analytics except SPC and Predictive Analytics. Legends A legend provides you with a guide for what you see when an analytic is visualized. Legend can also be used as a link that takes you straight to a report or analytic. Understanding Dashboard Manager Dashboard Manager User Guide 15 Login You log into Dashboard Manager to check the status of your portfolio, which displays up-to-date information on your business. You log into Application Foundation from where you can get into Dashboard Manager. Logging into Application Foundation for the first time If this is your first time logging into Application Foundation, do the following: · Obtain a user name and password from your administrator. · Obtain a URL to access Application Foundation from your administrator.

It has the following format but can be customized: - [http://\[machine name\]/apps](http://[machine name]/apps): To log into: 1. Click Log In. 2. Enter the User Name and Password, and click Enter. Logging out When you have finished using Dashboard Manager, exit the application by logging out of the product rather than by closing your browser. This helps system administrators keep track of which users are logged into the system and active at any given time. This also allows the administrators to configure the system to handle transaction loads most efficiently. Login 16 Dashboard Manager User Guide Logging out is easy. If you are inactive longer than the maximum time period defined by your administrator, you are automatically logged out. You can also actively log out at any time. To log out: 1. Click Logout on the service bar. The Logout page opens as shown below: 2. Click Yes. If you decide you do not want to log out after all, do any of the following: 1.

Click No. 2. Return to the previous HTML page you viewed by clicking the browser's Back button. 3. Go to any other part of Application Foundation by clicking a link in the navigation bar.

Getting help From the login page, familiarize yourself with the online help system by clicking the button to the left. A PDF file opens the Adobe Reader window in your Web browser that contains a table of contents, an index, and a search engine. Understanding Dashboard Manager Navigation within Dashboard Manager 2 chapter 18 Dashboard Manager User's Guide Overview This chapter helps you understand exactly how Dashboard Manager works. It highlights the navigation that is used throughout the application. You can learn how to customize a page, analytic, and how to create your own dashboard. Navigation within Dashboard Manager Dashboard Manager User's Guide 19 Site map for Dashboard Manager Below is a table that guides you through the entire application.



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)
<http://yourpdfguides.com/dref/3771460>

The table gives you an exact view of all the sub modules under each tab or page. The blue bar represents the service bar within Application Foundation. As you click on each of the links in the service bar, the respective options can be seen. Site map for Dashboard Manager 20 Dashboard Manager User's Guide Navigating in Dashboard Manager Once you get into Dashboard Manager, you can select the application you wish to work in.

To get into Dashboard Manager, click the circled button on the image. Once in the main page of Dashboard Manager, you can select the application. There is also a Service Bar on the right side of every page, that allows you to perform basic functions. Home My Dashboard Setup Application Foundation Options Help Logout Those options are: · Home - takes you back to the InfoView home page. · My Dashboard- allows you to define your analytics page. · Options - takes you to the set up user specified preferences that control the user experience when interacting with Analytics provided by Application Foundation. · Set up - Setup assists the administrative user to configure and deploy Navigation within Dashboard Manager Dashboard Manager User's Guide 21 · · ·

Application Foundation. Application Foundation - takes you to the page that allows you to build an application and create documents. Help - connects you to the PDF format of the User Guides. Log out - allows you to logout of the application.

If you have more than one application, you can access these by clicking on the Application Foundation drop down. Select the application you wish to change. You will go into the selected application with its own tabs and sub tabs. Navigating in Dashboard Manager 22 Dashboard Manager User's Guide Within an application there are modules or menus. As you select one application, the respective modules or menus tabs are displayed.

These menus are functions within an application. If you click the menu within the application, there may or may not be sub menus. Any associated sub-menus are displayed. Selected application name Menus under the selected application Sub menus Below are some of the icons that lead you to perform various functions: Expand/Collapse - to expand or collapse the window frame. Maximize/Restore Expanded view Remove Link to document/analytic Toggle to draft mode Show prompts Navigation within Dashboard Manager My Dashboard 3 chapter 24 Dashboard Manager User's Guide Overview This chapter takes you through the steps of laying out and configuring the contents of your personalized portfolio.

It gives you specific information for customizing your analytic so that you can access all information you need quickly and efficiently. This chapter has two sections: · Customizing My Dashboard · Customizing any page in Dashboard Manager Changes to My Dashboard affect your view only: other users are not able to see the changes made. When you customize any page in the application, however, you modify the view of all users. Everyone is able to view the changes being made. My Dashboard Dashboard Manager User's Guide 25 Add/customizing a page The My Dashboard component enables you to build a customized view. It also provides an alerting feature that keeps you advised of important changes in the behavior of key customer sets. My Dashboard is your space for building and reviewing your personalized portfolio of Application Foundation. In My Dashboard: · The layout and content you configure for your analytics maximizes the efficiency with which you gather information. · My Dashboard enables you to configure your portfolio as per your choice of content and layout. · My Dashboard also enables you to browse important categories of information, track specific reports, and monitor important web sites.

NOTE To get to My Dashboard link on your service bar, please make sure that you go into the Options and change the personalized version choice to My Dashboard. Please refer to Display on page 53. Add a page You add pages in My Dashboard. Three pages are created by default. You can add as many pages as you need. Add/customizing a page 26 Dashboard Manager User's Guide To add page click Add Page as shown in the image below. A new page tab is added for each page that you add. You are free to customize each new page. You also have the option of deleting each page. Customize a new page My Dashboard lets you create your personal view of the analytics available in the different applications.

Use My Dashboard to gather information important to you into a view that supports your preferences. When you customize a page, you define the content and layout for the new page created. You also have the option of grouping various analytics in one. My Dashboard Dashboard Manager User's Guide 27 Customize page content You can configure My Dashboard to display the following types of analytics: · Analytic catalog · Existing analytics · Corporate analytics · Personal analytics · New analytic · List of analytics · Analytic services To customize the contents of a page: 1. Click Customize.

The Content and Layout page opens. Before selecting the analytics for your dashboard, you can select existing templates, define grid size and/or select if wish to activate snap to grid. Add/customizing a page 28 Dashboard Manager User's Guide 2. Click on the drop down and select the template name. Based on the template definition the page displays the layout.

An example is displayed below. 3. You can specify the grid size to either be small, medium or large. The grid appears when you try to resize the analytic window. My Dashboard Dashboard Manager User's Guide 29 4. Select the analytic folder, then browse until you locate the analytic that you want to display. 5. Drag the analytic to the empty part of the page. A window is displayed. Edit analytic 6.

Click Edit on the title bar. A new page opens where you can change or specify information for the selected analytic. 7. You can apply the new definition or any changes made. To do so click any of the following buttons: · Apply - this applies the new definition or changes made in the application. The changes are applied but you still remain on the same page. · Cancel - this cancels any information entered on the page. · Apply and Close - this takes and applies the new definition or changes made in the application. The changes are applied and it closes the page. · Cancel and Close - this cancels all the information entered and closes the page to go back to the main My Dashboard page.

When you are done editing each pane's content, you now have a personalized page with the important information you want at your fingertips each time you log into Dashboard Manager. Below is a list of analytics that you can drag to your page.



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)
<http://yourpdfguides.com/dref/3771460>

· Analytic catalog This lists all the analytics that are part of Application Foundation. · Existing analytics All existing analytics are listed for you to make a selection. These are the analytics linked to all the applications created with Application Foundation.

· Corporate analytics Corporate documents are a list of your business related documents. These Add/customizing a page 30 Dashboard Manager User's Guide · · · documents are created using WebIntelligence, BusinessObjects etc. Personal analytics Personal documents are list of documents you may have created specific to your requirements. Such documents can be listed on your page for easy access. New analytics You can view all analytics in this folder: - Set Based Analytics - If you have Set Analyzer installed you can view the analytics based on Sets.

This displays all the single and multi set analytics. - Enterprise Based Analytics - All the existing enterprise analytics are listed which can be selected to be added in your portfolio. - Predictive Analytics List of analytics Predefined list of analytics include corporate, personal, in-box and schedule and their sub categories. Analytical services These services include - Rules, Export List, Scheduler and New Document. Like any other analytic you can also add an OLAP (Online Analytical Processing) document in the dashboard. OLAP documents contain definition information including the connection information to the OLAP server and the cube and selected dimensions in the document. They do not contain data (like an AFD) and the data is retrieved from the OLAP source when the page is opened for access. My Dashboard Dashboard Manager User's Guide 31 As you can see from the above picture, the OLAP documents are visible like any other document and you can use the drag and drop function to add them to the dashboard page. Customize page layout You can modify the layout of My Dashboard specifically for your user account by choosing from the options presented in the My Dashboard's layout page. To customize a page:

1.

Click the New Page tab which is created when you added a page. As you click the layout tab, the page allows you to define either the layout or the content. 2. Enter the Name of the page. 3. From the drop-down list select the style sheet for the page. The style sheet defines how the page looks. By default style is Windows. A preview of the selected sheet appears on the page. Add/customizing a page 32 Dashboard Manager User's Guide 4. Click Apply, then Close to save the changes made on the page. Page created Delete analytic from page Expanded view Customize the page Move pages -left/right 5. If you do not want to save the changes, click Cancel. NOTE A WebIntelligence document allows you to make edits and takes you into the WebIntelligence edit query panel. My Dashboard Dashboard Manager User's Guide 33 Customize an analytic layout You can also customize the layout of a dashboard.

To get in here, click on the Edit icon once you have customized the page content: To customize the layout of any analytic: 1. Click the Layout tab. The Layout page is displayed as shown: 1. In the Title box enter the title of the analytic. The title is a generic name that Customize an analytic layout 34 Dashboard Manager User's Guide does not relate to the specific metric name.

This name appears on the title bar of the window. 2. In the Description box, enter a description of the analytic. The security command allows you to secure viewing of the analytic: 3. Click on the Select link. 4. Select the application and the modules which you want secured for the page. 5. You can Display the analytic as a link or a window on a page. Click the appropriate option button.

If you select the analytic as a link, it is displayed as follows: My Dashboard Dashboard Manager User's Guide 35 6. If you wish to display the analytic as a window, you have three options. Select one of the following options: - Show window border, which displays as follows: - Show only expanded bar, which displays as follows: Customize an analytic layout 36 Dashboard Manager User's Guide - Show both, the expanded bar and window border, which displays as follows: 7. If you want to change the image of the analytic, click Change Image. The images from which you can choose are displayed in a new window as shown below: 8. Select the image you want to use, then click OK. 9. Style Sheet allows you to define a particular look of the analytic. Click the My Dashboard Dashboard Manager User's Guide 37 drop-down list to select the style sheet you want. A preview is displayed next to the list of styles.

10. Once you have entered all the details, click OK. Your analytic is now defined with content and layout. The content and the layout of various analytics define a page. Customize an analytic layout 38 Dashboard Manager User's Guide Retrieving analytic from inbox The new Application Foundation can now access your personal inbox to retrieve documents.

Your personal inbox contains documents that other users have sent you. You can now retrieve documents from another users inbox to display in your analytic list. All users have the rights to access their own Personal, Corporate and Inbox document pages; this depends on whether you have been granted the rights by your system administrator. When you use a personalized dashboard with inbox analytic, you can obtain information based on your log in. For example, if John logs into the application, he would get John specific data.

If Mary logs in, she would get Mary specific data. This would be obtained from their respective inbox document list. Personal inbox analytic looks for the latest copy of a document by name in the currently logged in user's inbox. If it does not find one, it displays a warning message. Personalized inbox analytic are used in shared corporate dashboards but are retrieved from personal inbox. Inbox analytic facilitates pre-scheduling refresh from BCA. There are a number of benefits of using the inbox analytic. · It supports the supervisor row level security · It does not require to be refreshed when opened · It supports any type of documents, reports or analytic · It does not require BCA to get personalized content · It provides personalization capability that scales with core For more information on how to create a document in your inbox, please refer to the InfoView User's Guide, version 6.5.1.

Add personalized document To add a personalized document, you have to get into My Dashboard. 1. Click My Dashboard icon. 2. Click Add a Page. 3. Click Customize. My Dashboard Dashboard Manager User's Guide 39 4. To add a document to your dashboard, drag and drop the document name from the folder. You can change the document display option by clicking the Edit icon.



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)
<http://yourpdfguides.com/dref/3771460>

5. You can select a corporate or a personal document. Click on the appropriate radio button. The list of documents is displayed. 6. Select the document to be displayed in your dashboard. Retrieving analytic from inbox 40 Dashboard Manager User's Guide Once you select the document you can define the document retrieval properties. The selected document can be displayed three ways. · retrieving from the original document list above. · checking for a personalized copy of the document and then displaying it on the dashboard.

This option checks for the selected document in the user inbox. If the document is not available the document is searched in the personal or corporate repositories. · looking only in the personal inbox. 7. Click on the appropriate option check box. 8. Click OK. My Dashboard Analytic Properties 4 chapter 42 Dashboard Manager User's Guide Overview This chapter helps you understand basic properties of any analytic within Dashboard Manager. For every Analytic you can perform the following functions: · Add to My Dashboard or to another page · Edit an analytic · Email - an analytic · Save as - an analytic · Send - an analytic · Refresh - an analytic on the screen · Close - close the analytic To access these options click the analytic. Refresh Close Add to My Dashboard You can add an analytic to the My Dashboard page or to any other page of your choice.

1. Click Add to My Dashboard. The add analytic dialog box appears, such as, the Add Control Chart to My Dashboard dialog box in the example below. 2. Click the drop-down list to select the page where you want to add the analytic. 3. If you want to create a new page for this analytic, select the option and enter Analytic Properties Dashboard Manager User's Guide 43 the page name. Depending on the choice selected the analytic appears in the chosen existing personal dashboard page or a new page which is created by this workflow. Email You can email the displayed analytic to someone by using this link. Click Email and the email form opens.

By default the analytic is attached as an svg for the recipient. The Toggle Attachment button can be used to remove this attachment or include in the email. Save an analytic You can save an analytic that is displayed on a page. An analytic can be saved as a personal or corporate document. There are three formats in which you can save an analytic.

- AFD: Application Foundation Document in SVG view stores all related elements of the chosen analytic: the definition, data, and the rendering in its AFD. Application Foundation analytics that are in applet view store the definition in its AFD. BusinessObjects documents are saved in their original format. · XML: This format saves only the data using the XML format that allows you to share information between various applications. · SVG: Scalable Vector Graphics format is a snap shot capture of the analytic 44 Dashboard Manager User's Guide which can be viewed on any browser with a SVG plug-in from Adobe. The SVG format can be resized without losing resolution which further allows to display on your dashboard and for printing an analytic. 1. Click Save As. 2. Select one of two options: - Save as a Corporate Document - Save as a personal document If you click Save as a Corporate Document, the following page is displayed: 3. Enter the following information in the appropriate boxes: - Document Name. - Document Description. - Keyword you can use to search for this document. There are no restrictions on keyword definition. Click the Categories tab to assign a category to your document.

Categories are optional, however they help locate documents more quickly. Enter the Analytic Properties Dashboard Manager User's Guide 45 Category Name in the box shown below: Refresh List 4. Click Create. A message confirming the new category is displayed. 5. Click one of two options: - create a brand new document - overwrite an existing one. 6. Click a refresh option: - when opened - every time the document is opened - manually 7. Click OK to save the analytic. A status is displayed to let you know that the document has been saved.

8. Click Back to Analytic to go back. An analytic saved as a corporate document is stored in the Business Objects repository. It is available from the list of corporate documents. An analytic saved as a personal document is stored in the personal storage space for the user in the Infoview storage space. To save the document for personal use click Save as Personal Document. 46 Dashboard Manager User's Guide Enter the details, then click OK. Send an analytic You can send Application Foundation documents and other files that have been uploaded to the system to other Business Objects users. Unlike an email, documents sent this way go to the Business Objects users Infoview inbox. To send a document: 1. Click Send tab. 2. The send page opens. At any point before you actually send the document, you can return to where you were in Application Foundation by clicking the Analytic Properties Dashboard Manager User's Guide 47 Back to Document or Back to Document List. 3. Enter the document name. 4. In the Description box, enter a Description. Descriptions are displayed in the document list when it is in the expanded mode. 5. Enter one or more Keywords to serve as search criteria for this document. Keywords are optional. 6. Enter the Document Type. You have a choice of xml, afd and snapshot. 7. Define how you would like the analytic to be displayed. The choice is as an applet or svg. 8. Every analytic can be refreshed manually or when every time the analytic is opened.

48 Dashboard Manager User's Guide 9. Click on the User tab. 10. Select the Domain in which you want to store the document. 11. Select the User(s) to whom you want to send this document. 12. Click OK. A message appears to notify you that the document has been sent to the selected user(s). You can apply the same Generic Analytic framework to OLAP documents as applicable to ensure consistency with these documents.

OLAP documents retrieve data from the OLAP data source when opened and hence there is no concept of a refresh for OLAP documents. Application Foundation edits an OLAP document by adding new dimensions or measures from the cube metadata on the left and hence there is again no need for an edit action. The other actions are available as follows · Download - downloads the csv for the OLAP document into an excel spreadsheet. It is available as the OLAP document interface you may be able to reuse that in the top bar assuming the SDK supports this functionality. · Add to My Dashboard - allows you to place the OLAP document on the My Dashboard page in a workflow similar to what is used for other analytics. · Email - can send the csv over to the email recipient · Send - allows you to send the OLAP document to the user WebIntelligence inbox Save - allows you to save the OLAP document to the corporate repository or personal storage area as an ovr file.



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)
<http://yourpdfguides.com/dref/3771460>

Analytic Properties Dashboard Manager User's Guide 49 Refresh an analytic The Refresh link allows you to reload the current analytic if you have made edits, or updates to display the latest data. Click on the Refresh button. Close an analytic To close the analytic click on the close button. 50 Dashboard Manager User's Guide Analytic Properties Options 4 chapter 52 Dashboard Manager User's Guide Overview This chapter helps set up user specified preferences that control the user experience when interacting with analytics provided by Dashboard Manager.

Options Dashboard Manager User's Guide 53 Options The options icon is located in the upper-right section of the service bar. Display Use Display to define user preferences for Application and My Dashboard default start page as well as customization options such as Default style and Grid Settings for the page customization. On this page, enter the following: 1. Select one of the any of the page as default start page that is displayed when Options 54 Dashboard Manager User's Guide you log into Dashboard Manager: - Default main page - My personalized page - Corporate documents - Personal documents - Inbox 2. Select the layout of the page. You can choose from Modern, Classic or Design. 3. From the drop-down list, select the style you want to use as the default page when you create a new page. The choice is - windows, java metal, Redbaron, demo, Business Objects, and Dark red. 4.

Define the grid properties. Select one of the two grid options: - Show grid - displays the grids in reports, graphs etc. - Snap to grid - allows you to accurately position in a grid. 5. If you selected a grid option, select the size - small, medium or large.

6. Check the option if you wish to view analytics with 508 compliancy. 7. Application Foundation 6.5.

1 allows analytics to be 508 complaint. The user interface has been modified to comply with the Section 508 guidelines (a federal ruling on Electronic and Information Technology Accessibility Standards that went into effect on 21 December 2000). These guidelines are aimed to make Federal websites and software accessible to people with disabilities. Based on a user option, some analytics will appear in a format more suitable for screen readers. 8. Define the language for the user interface. This defines the user locale for setup like date format, numbers, etc. 9. Define the Personalized pages. This can either be My Infoview or My Dashboard.

10. Specify the width of the left column to either small, medium or large. This is a percentage increase. 11. Click Apply to execute the changes. Options Dashboard Manager User's Guide 55 List On the List page you define the refresh options at the user level for the Corporate Documents list, Universe list and Inbox document list. Use List to set up these preferences. The list tab lets you specify how to refresh the: - corporate documents list - personal list - inbox Document list - select how you would like to refresh the list. - universe list - select how you would like to refresh the list. Options 56 Dashboard Manager User's Guide View On the View page you define how to view BusinessObjects documents.

You can view WebIntelligence or BusinessObject documents. To choosing a view format: 1. Click Options. 2. Click the View tab to open the View page.

3. Under Select a View format select the format in which you want to view WebIntelligence documents: - HTML - HTML interactive - Portable Document Format (PDF) 4. Under Drill options, select how you want to start each new drill session: - duplicate report - existing report 5. Select the general drill options - Prompt if drill requires additional data - Synchronize drill report blocks - Hide drill toolbar Options Dashboard Manager User's Guide 57 You can view BusinessObjects documents with BusinessObjects. Choosing a view format: 6.

Select the format in which you want to view BusinessObjects documents: - HTML - PDF - Enhanced in InfoView - BusinessObjects format 7. Click Apply to confirm your choice. Create and Edit The Create/Edit page lets you select the type of document to create when you create a new document. By default the document type is WebIntelligence and the report panel is Java. To set the Create/Edit options: 1. Select the Document type for your default document: - WebIntelligence - BusinessObjects. 2. For WebIntelligence documents select the report panel display: - Java Report Panel - HTML Report Panel 3. Click Apply. Options 58 Dashboard Manager User's Guide Password Your initial Application Foundation password is created by the BusinessObjects supervisor who defines your user profile.

Once you have logged into Application Foundation you can change your password to one of your choice if you have the rights to do so. If your supervisor has not given you rights to change your password the Password tab is not displayed in the Options page. To change your password: 1. Click the Password tab. 2. Type your current password in the Current Password box. 3. Type your new password in the New Password box. This is case-sensitive. 4.

Confirm the new password by typing it again in the New Password Again box. 5. Click Apply to confirm your choice. Options Dashboard Manager User's Guide 59 About This page gives details about Application Foundation version. You can also define default options for the server and options here.

Options 60 Dashboard Manager User's Guide Options Application Builder 5 chapter 62 Dashboard Manager User's Guide Overview The goal of Application Builder is to let you rapidly design, build, and deploy applications across the entire enterprise without any programming. Using the Application Builder, you can customize the look and feel according to your specific design goals. As you make the changes, they can be executed right away. You can see the changes there and then. This ability to dynamically make and view changes to the application design provides for active feedback from all stakeholders in the application thereby leading to a compressed application development life cycle.

The builder provides a hierarchical view of the application's designs. Application Builder Dashboard Manager User's Guide 63 Create an application An application can consist of menus (tabs), sub menus (sub-tabs) and analytics that together satisfy its functional requirement. You can add, modify or remove one or several applications, menus or sub-menus in the Application Builder. The item added or removed can be placed at different level in the Application Structure. To build an application: 1. From the Dashboard tab, click on Application Builder. The main Application Builder page opens. 2. Click Add, then select New Application from the menu that appears. When you select a new application, the appearance of the right side of the Create an application 64 Dashboard Manager User's Guide page changes to allow you to enter basic details for the application.



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)
<http://yourpdfguides.com/dref/3771460>

Enter name Link the application with a xml 3. Enter the Name you want to give the application 4. Click Advanced Parameters to enter more details. 5. To enter a security command, click Select and select the command from the list. 6. Click OK to make the selection. The selected security command is displayed in the field. You can clear the command by clicking the Clear link. 7.

Enter the XML file to which the application is to be linked. Application Builder Dashboard Manager User's Guide 65 NOTE You must link the new application to an XML file, otherwise a default file, corppage1 is used. 8. Enter the Help URL to which the application is to be linked. 9. Click Save to create and save the new application. The name is added to the structure tree. New application added You can customize the content and layout of the page by click on the link. Refer to Customize an analytic layout on page 33 for more details. The next step is to create a menu bar for the new application.

To create a menu bar: 1. Click Add, then select New Menu from menu that appears as shown below: t 2. Enter a name for the menu created. 3. Application Foundation automatically fills the XML details. The rest of the advanced parameters are optional. 4. Click Save to add the new menu in the structure tree. Create an application 66 Dashboard Manager User's Guide Once you have added a menu and linked it with a XML file, you are now ready to add a sub menu. You create a new sub-menu in the same way as you created the application and the menu bar.

5. Click Add, the select New Sub-Menu to begin: NOTE A sub-menu is not mandatory. It is acceptable to design applications that have menus with analytics on their page. It is upto the designer of the application to choose the structure. To view the structure of this new application, select the name, in this case, Analysis Apps, from the drop-down menu at the top of the page. The menu and sub-menu are below the new application. What you did was create a new application which has your custom tabs and sub tabs. To create groups and analytics, click Customize the Content and Layout of this Page. In the new page that opens, you can define more aspects to the new application that you just created. Application Builder Dashboard Manager User's Guide 67 Copy an application You can copy an entire application with or without its sub-menus.

This reduces the steps required to recreate a similar application. To copy an application: 1. Select the application to be copied. 2. Click Copy. The Copy Demo Application dialog box appears. 3. Select one of the following: - Demo Application only - the main application is copied - Demo Application and all its children - the entire application is copied 4. Click OK. The copied application appears in the Application Structure.

Copy an application 68 Dashboard Manager User's Guide You can copy just the menus and submenus from one application to another. To do so: 1. Select the menus and submenus of the application to be copied. 2. Click Copy. The Copy dialog box opens: 3. Select the option you want, then click OK. Based on your selection the menu is copied to another application with or without its submenus. When you copy a menu it is copied in the same application. To move it to another application click the Up or Down buttons.

Application Builder Dashboard Manager User's Guide 69 When you copy an application, menu or submenus, the XML files are also copied but with a new name. You can see the same in the display below. The security command and the help link are also copied. Copy an application 70 Dashboard Manager User's Guide Reorganize tree To move the menus and submenus up and down, click the Up and Down buttons. This reorganizes the tree. Remove an application You can remove or delete an application menu or submenu within an application by clicking on the Remove icon. 1. Select a application or submenu. 2. Click Remove.

You can see a confirmation window before actually deleting. 3. Click OK to delete the selected application or submenu. Default page You can specify what page you want the application to open at login. By default it opens the main page, but you can select another page, for example, My Dashboard.

Application Builder Dashboard Manager User's Guide 71 To define a default page: 1. Click Application Builder to open the main Application Builder page. 2. Next to the Menu box click Select to browse the menu or submenu page. 3.

In the Select a value dialog box, Click the page to be displayed after you log in. 4. Click OK. The selected menu name is displayed in the Menu box on the main page. 5. Click Save. In addition, you can also define which page to open into when any enterprise user logs in. For example, all users log into see My Dashboard which is customized for their view. Copy an application 72 Dashboard Manager User's Guide Application Builder Metrics 7 chapter 74 Dashboard Manager User's Guide Metrics Metric definition and scheduling make it possible to quickly and easily glean important details and trends from extremely large and complex data sources. This section explains in detail the parameters and tools of the Metrics tab.

Create a new metric Click Add to add a new metric. The Create Metric screen appears. There are three sections to be completed to define a metric. To add a new metric do the following: 1. On the page, you have to first select a set by clicking from the drop-down list. For example, you want to take the Collectors set and define a metric for it. You can view sets by sets or groups. 2. Click New tab. The Create Metric window appears.

Based on the set and subset you selected the metrics are displayed. 3. Select a subset for the set. For example, you want to know the number of Metrics Dashboard Manager User's Guide 75 female stayers in the Collectors sets. 4.

Click Next to move to the next section. The next step is to define the measure for the selected set and the subset combination. 5. Select the measure from the list. This measure is going to be for the selected set and subset.

For example, you wish to know the age of the female stayers in the collectors set. 6. Select a dimension for the measure. For example if you select Age as a measure, the dimension can be above 50 or below 35. 7. Select the aggregation function for the measure. For example, if you want to find an average for the measure age of female stayers. 8. Click Next to move onto the Metric Attributes. This is the section where the details of the metric are defined.

Metrics 76 Dashboard Manager User's Guide Metric Description - The Metric Description field contains a description of the metric compiled from the set, measure, subset and dimension. You have the option to change the metric description. Calculation interval - The duration of the time periods or slices that make up a metric is called the grain.



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)
<http://yourpdfguides.com/dref/3771460>

The metric grain can vary from small spans of time to longer and is dependent on the calendar -- the finer the grain, the shorter the time period between metric value calculations. The intervals can be daily, weekly, monthly, quarterly or yearly. Refresh Type - You can specify the default refresh type to match that of the Set Analyzer set that a set is based upon, or you can select a custom refresh rate that differs from that of the Set Analyzer set. If you want to use an external metric calculation, you can select External Refresh. Storage Options - Because metric values require very little storage, it usually makes sense to store the full metric history so that trending can be done. You can, however, also choose only to store the most recent value or disable the storage. Default Smoothing - The Default Smoothing list allows you to specify the statistical transformation that is used in reporting on the metric when the user accepts the Default Smoothing selection in the Smoothing list.

The nature of the data you are probing and which questions you hope to answer determine the type of smoothing that is most suitable. Available transformations are determined by your administrator during installation and configuration. Metrics Dashboard Manager User's Guide 77 · · · Unit - The metric unit displays the default unit of measure for display and reporting purposes. Trend color - The Trend Color chooser allows you to specify which direction of change in metric values is interpreted as positive and which is interpreted as negative. You can choose whether increases are shown in green and decreases in red.

Or the increase is in red and decrease in green, for instance, company costs. Metric history - This field allows you to define how much back dated information you want to be provided for this metric. Also it allows you to enter start and stop dates for metric calculation. - The start and stop periods must be included in the calendar span, but can be before or after today's date. The stop period must be greater or equal to the start period.

By default the stop period is "undefined". Metrics created with a previous version of Application Foundation has an undefined end period. - Select the Start Date by clicking the calendar. - You have a choice to stop the metric calculation. To do so, click the check box to stop metric calculation. As you check the box, there is an option to enter the stop date. - Click the calendar to select a month and date to stop the calculation. - Stop at Current Period allows you to stop calculating a metric on the current date. Edit a metric - Regarding the metric history, if the metric has no value (has not been refreshed yet or has been purged), the user can change the start period, the stop period and the refresh option. It is like the creation mode.

- If the metric has some values, you cannot change the start or stop period. You can also change the refresh type from recurrent to one-time. - If a metric has reached its end (for example, last period same as stop period), the Refresh button is inactive (for example, grayed). 9. Click Finish. The metric based on its sets, measures and attributes is created and displayed on the main page. The metric is added in the Available metric list under the appropriate set and subset. If you make any changes on this page, the Apply button lets you change the definition of the metric. Metrics 78 Dashboard Manager User's Guide New Metric added to the List What determines a metric refresh? Metric refresh occurs according to the refresh type of the metric. The following cases describe the actual metric refresh process that occurs once a metric has been defined.

When Set Analyzer's Set Agent module completes the refresh calculation for a set, it invokes an after-refresh method on a server to enable metric refresh processing. · Case A: Based on a set refresh event · Case B: Based on an independent metric refresh event. Case B means that you need a scheduled task. After performing the metric recalculation, the metric engine logs the metric ID, date/time of the recalculation, and how long it took. System administrators use this information for performance tuning and for managing machine resources.

Metric refresh scenarios When defining a metric, the user specifies a start period and can also specify when the metric refresh must stop. The start date and stop date must fall within the span of the calendar used by the metric. Following are the different scenarios supported for metric refresh. · Unlimited recurrent refresh This is the most common case; no stop date is specified. The metric is refreshed up to the current period on a regular basis and indefinitely. Metrics Dashboard Manager User's Guide 79 Start Refresh Period Metric history · Limited recurrent refresh This case is useful when you need to time-bound a metric. A date in the future is defined as the stop date and the check-box "Stop at Current Period" is checked. The metric is refreshed up to the current period on a regular basis. When the metric has reached the stop date, it is not refreshed anymore. Start Refresh Period Stop · One-time refresh beyond current period Application Foundation allows you to load future values such as plan, budget or forecast. A date in the future is defined as the stop date and the check-box "Stop at Current Period" is un-checked. The metric is refreshed up to the stop Metrics 80 Dashboard Manager User's Guide date in one go, regardless of the current period. Refresh period Start Stop · Retrospective analysis If you need to do analysis on past data, you can set up a metric which stop date is before the refresh period. The metric values will be backfilled in one shot. Note that the check-box "Stop at Current Period" has no effect in that case.

Start Stop Refresh period What are sliced metrics? Application Foundation provides for "slicing" Metrics based on a dimension. When a sliced metric is refreshed, a value is calculated for each distinct value of the associated dimension. A metric can be sliced on one dimension for some purposes and sliced on another dimension for others. Some users--for example, business partners in an extranet environment--may be restricted to viewing only certain slices of a Metric EXAMPLE For example, a NewCo, Inc. employee may only be permitted to view the "NewCo" slice of any sliced metric whose slice dimension is "Company" He may also be permitted to view the "Northeast" slice of metrics sliced on "Region" These access restrictions are defined in System Configuration. Metrics Dashboard Manager User's Guide 81 "Sliced" Metrics can be viewed for benchmarking individuals to a sliced Metric. You can choose which of the slices are available want to filter on (including "unsliced").



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)
<http://yourpdfguides.com/dref/3771460>

The metric comparison screens in Individual Analysis then filters out all Metrics except for those with values for the user-selected slice within the user-selected time interval. This greatly increases the potential value of Individual Analysis for extranet users having restricted access to Metrics. What are external metrics? Metrics whose values are calculated independently of Application Foundation are called external metrics.

For example, you may want to devise a complex customized metric calculation for a particular set that is difficult or inefficient to express in SQL. By updating the metric tables directly, but still making the metric known to the application, you can retain the benefits of Application Foundation's analysis capabilities, document management, and personalized information management. NOTE The Application Foundation Metric Engine does not attempt explicit refreshes for external metrics; furthermore, this application does not permit you to uncheck an external metric. Multi-set metrics · For a particular set, you can select multiple subsets or measures or transformations to define multi Metrics. · For a particular group, you can define Metrics for each set that belongs to the group.

· For a particular level of the tree list, you can refresh or purge all the Metrics under this level. You can use a view by measure, by set, by subset or by group. Paired-set Metrics enable you to track relationships between sets over time. Four types of paired-sets metrics are built into the product · Migration Migrants are individuals who left a given tier to join another given tier. Migrants (p) from Set A to Set B are: Set A leavers of the period that joined Metrics 82

Dashboard Manager User's Guide Set B in that same period Leavers (p) Set A Joiners (p) Set B · Migrant metrics are applicable to temporal sets only. Also they are not commutative which means that Migrants from A to B are different from Migrants from B to A Overlapping members Overlapping Members of Sets A and B are: Set A Members of the period that are also Members of Set B in that same period Members Set B Members B Set A · Overlapping Members are applicable to two temporal sets or two non temporal sets or the combination of a temporal and a non temporal set. They are commutative which means that Overlapping Members of A and B are identical to Overlapping Members of B and A Same time joiners Same time joiners(p) of Sets A and B are: Set A Joiners of the period that joined Set B in that same period Joiners (p) Set A Joiners (p) Set B · Same time joiners are applicable to temporal sets only. They are commutative which means that Same time joiners of A and B are identical to Same time joiners of B and A Same time leavers Same time leavers(p) of Sets A and B are: Set A leavers of the period that left Metrics Dashboard Manager User's Guide 83 Set B in that same period Leavers (p) Set A Leavers (p) Set B Same time leavers is applicable to temporal sets only. They are commutative which means that Same time leavers of A and B are identical to Same time leavers of B and A. Manual entry metric Dashboard Manager 6.5.1 enables you to define a metric and its time-based values manually. Manual entry metrics can be used to define KPIs that do not exist in any system like survey results for instance. NOTE Defining a manual-entry metric requires to use a non-set based subject area. To add a manual entry metric entry follow the steps below.

1. Click on Add and select the manual entry metric option. Metrics 84 Dashboard Manager User's Guide The Create Metric window appears. 2. Enter the metric Name. 3. Select a Calculation Interval. Calculation interval - The duration of the time periods or slices that make up a metric is called the grain. The metric grain can vary from small spans of time to longer and is dependent on the calendar -- the finer the grain, the shorter the time period between metric value calculations. The intervals can be daily, weekly, monthly, quarterly or yearly.

4. Enter the Refresh Type. There is only one type for this metric. 5. Select the Storage option.

Storage Options - Because metric values require very little storage, it usually makes sense to store the full metric history so that trending can be done. You can, however, also choose only to store the most recent value or disable the storage. 6. Select Default Smoothing which is default and optional. The Default Smoothing can be used when reporting on the metric.

7. Enter Metric history. Metric history allows you to define how much back dated information you want to be provided for this metric. Also it allows you to enter start and stop dates Metrics Dashboard Manager User's Guide 85 for metric calculation. 8. Enter metric Unit. The metric unit displays the default unit of measure for display and reporting purposes. 9. Specify the Metric history by entering a start date and a stop date. 10.

Click Next. 11. Enter the values: one for each period within the span defined. 12. Click Finish to create a metric. Metrics 86 Dashboard Manager User's Guide Metric publishing Some metrics are a little more difficult to quantify a target for. For example, you may have a Number of Customers metric that is obviously important to your operational performance. However, for this metric, a target is unclear, and maybe simply inappropriate. You want to have your executive team aware of the Number of Customers, but they can draw their own conclusion with regards to whether to pay attention to it or not. One person may care if it is going up, another may care if it is going down.

But a single target is unclear. To facilitate this, we support the publishing of metrics. The Publish button will behave as follows: · It is only displayed when Performance Manager is installed, current Licensed, and the associated user has the capability to Publish Goals defined in Supervisor. · If no metric is selected, the button is visible but disabled. When a metric is highlighted, the button is enabled.

· The Publish button is not enabled when selecting a sliced metric. Once you create a new goal it has to be distributed to the right people or group of people. Goals are published for the following reasons: · Publish goals to user by "Role". This helps to get goals focused to the right interested parties. · Integrated goal portlet interface.

· Enable collaboration via discussion threads, previous actions, etc. · Recommend actions that link to other reports or recommended business actions. To publish a metric: 1. Click on the Publish icon. The information flow wizard appears. Metrics Dashboard Manager User's Guide 87 2. Select a Strategy to which the metric should belong. As you select, the new flow is added to the selected strategy folder. 3. Click on the "+" sign to expand the Strategy folders.



[You're reading an excerpt. Click here to read official BUSINESS OBJECTS DASHBOARD MANAGER 6.5.1 user guide](http://yourpdfguides.com/dref/3771460)

<http://yourpdfguides.com/dref/3771460>