Create an Analytics Dashboard

Last Modified on 07/26/2018 10:19 am EDT

v8.0-8.2

Create dashboards to visually monitor your environment.

Note: This feature is supported on SharePoint 2010 and later, using SharePoint 2013 Web parts.

Prerequisites

Make sure you install and configure the analytics feature. For more information, see Install and Configure Analytics.

Procedure

1. In the Administrator console, click the workflow that you want to create a dashboard for.
2. In the right panel, click **New Dashboard**.
3. In the Dashboard Designer, configure the data view by selecting the necessary data fields.

   Data View Configuration Options

Parameter	Action
Workflow drop-down menu	Select the workflow version.
Workflow data fields	From the Activities tree, double-click the data and metadata fields that you want to use in your dashboard.
Roles	The users roles with permission to retrieve the dynamic task.
Selected data fields	Edit the selected data fields, as necessary. ◦ **Name**: Used as the field identifier and should not contain special characters. ◦ **Caption**: The field name that is displayed on the dashboard in Flowtime. ◦ **Field**: The workflow path to the field. ◦ **Visible**: Determines if you can select the field as part of Visuals. Clear this checkbox if you are only using this field for filtering the data.

4. (Optional) Configure the data filters.
   - Use filters to specify the data that is sent to a dashboard from the database.
5. (Optional) Configure the Flowtime dimensions.
   - Use Flowtime dimensions to select the data fields that end users can select to filter the dashboard visuals in the Flowtime dashboard page. For example, end users might want to display data by customer or severity level.
   - If the Flowtime dimensions feature does not work (i.e., the drop-down menu does not display for the end user), verify that you have unique bindings for the SharePoint site. Open IIS on your SharePoint server and check how many bindings exist for your SharePoint site. You might want to delete extra bindings for the Lookup feature to work properly. Be careful, deleting bindings might affect how users access the site.
6. (Optional) Configure KPI .
   - KPIs are displayed as visual gauges or tables in the dashboard, with color-coded ranges.

    - You can only define KPIs for numeric fields.
    - Common KPI examples include time to resolve a support ticket, average time to resolve a support ticket, among others.
7. Create visuals to display in the dashboard.

What to do Next

After you create an analytics dashboard, publish the dashboard.

Important Update

In Cora SeQuence v8.3 and later, this feature was replaced with updated analytics and dashboards. For more information, see Analytics Overview.