

Create a Dashboard

Last Modified on 02/08/2021 10:26 am EST


V9.2.1

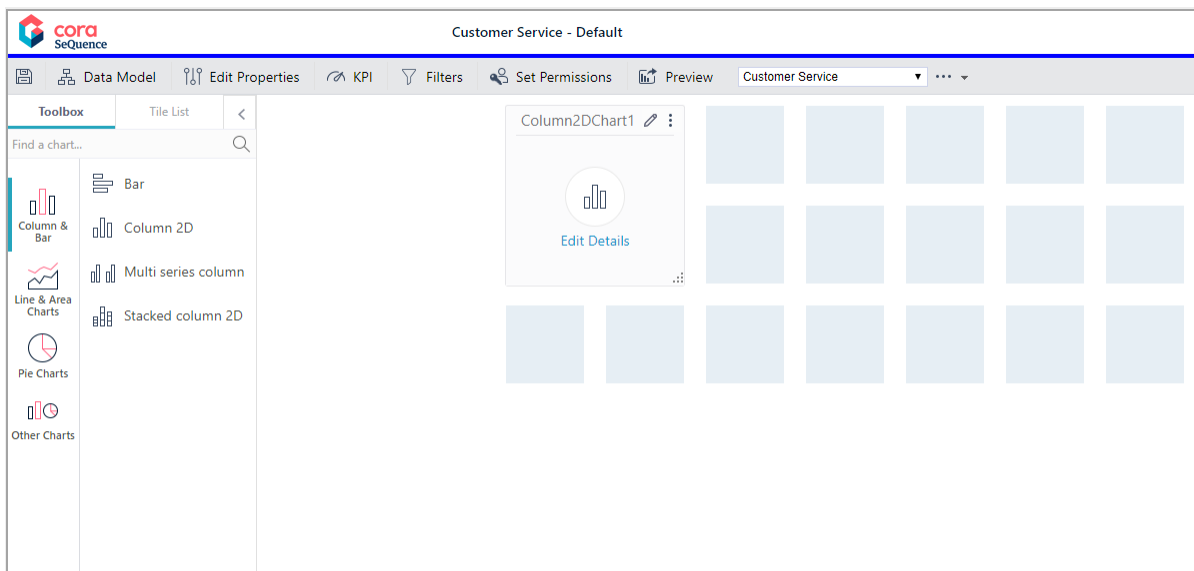
Prerequisites

Before you create a dashboard, you need to:

- Create a dashboard suite.
- Add the relevant queries to your data model.

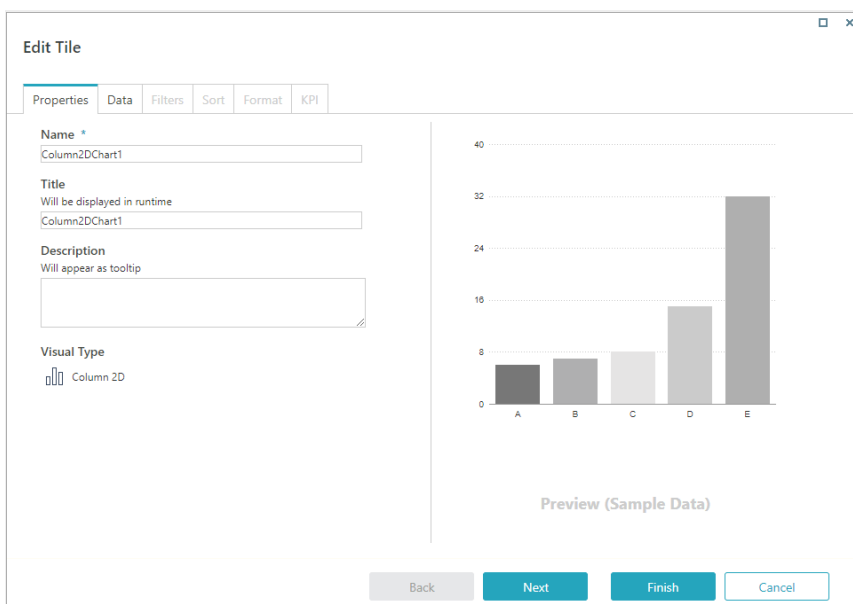
Create a new dashboard

1. On the Dashboard Suites page, locate the dashboard suite to which you want to add a dashboard, and click the edit button ().



The new dashboard already includes a tile with a bar chart. You can remove it or edit it, and add additional charts.

2. To edit the selected chart, click **Edit Details**.



3. On the Properties tab:

- a. Name: Enter a significant name for the chart.
 - b. Title: Enter the name to display on top of the chart when viewed in the Flowtime portal.
 - c. Description: Add a short description of the data displayed by the chart. This text displays as a tooltip when the chart is viewed in the Flowtime portal.
4. Click **Next**.
 5. On the Data tab:
 - a. Select the relevant query as the data source for the chart.
 - b. To define cache settings for the selected query, click **Advanced Options**.

Data Model Options □ ×

Caching

For Lookup table caching, go to the lookup table properties.

Enable	Name	Type	Interval (Sec.)	By Parameter
<input checked="" type="checkbox"/>	OpenInstances	Absolute ▾	300	

OK
Cancel

For more information on defining cache settings, see [this article](#).

- c. If relevant for the chart, set the X and Y axis.
- d. To add a link to the dashboard chart, under Drill Down, concatenate the process page that filters by the defined values.

Example:

`http://{flowtimeserver.com}/ProcessRecords.aspx?workflowSpaceId=09132f64-8d34-43a4-adccb842116e1c4c&ft&Customer=eq({fldCustomer})`

Edit Tile □ ×

Properties **Data** Filters Sort Format KPI

Choose Query

Account ▾

Category (x)

Group Categories (Using Aggregation)

T Account ▾

Values (y)

fldid ▾ Average ▾

Drill Down - Add a Link to the Tile

E.g. `http://www.flowtime.app.com?customer={fldcustomer}`

http://

Preview (Sample Data)

Category	Value
A	7
B	8
C	8
D	10
E	32

Back
Next
Finish
Cancel

TIP

You can also use the Drill Down field to link the entire chart to a Flowtime page. For example, you can add the URL of the Active Processes page to a Number chart.

Copy the link and remove https:// and the server name:

Process.aspx?workflowSpaceId=a0923039-78ae-464f-92ad-ffb8d6fc3583&workflowId=b844cc9e-21ea-4fc1-bb06-bee6ce77726c3

6. Click **Next**.

7. On the Filters tab, add filters to define the data displayed by the chart.

Column	Operator	Source Type	Value / Parameter Name	Delete
Account	=	Expression		X

- o The Filters tab is populated only if the data query you selected contains filters.
- o Only *In* parameters display.
- o A common filter is the *Rt.CurrentUser()* parameter.
- o You can filter an analytics query using a query string parameter.
For more information, see [Filter an Analytics Query Using a Query String Parameter](#) article.

8. Click **Next**.

9. On the Sort tab, define the parameter by which the data will be sorted in the chart.

Sort By

- None -
- None -
- fldid (Average)

Preview (Sample Data)

Category	Value
A	6
B	7
C	8
D	14
E	32

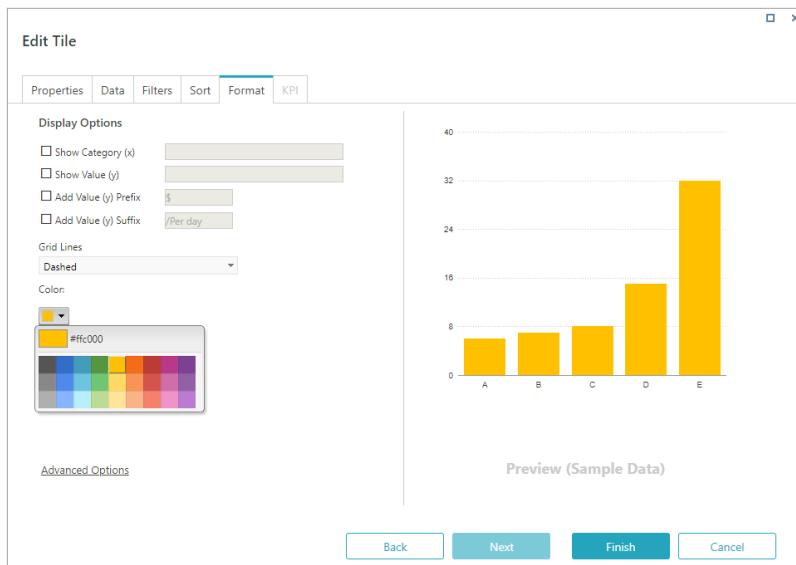
- o The Sort tab is available only when you select a lookup table as the data source.

10. Click **Next**.

11. On the Format tab, set up the chart look and feel:

- a. Display options: Select the elements to display on the chart.

- b. Legend: Define if the chart has a legend and where to display it.
- c. Color Palette: Set up the colors used in the chart.



- d. Use the advanced options to define formatting in JSON.
The JSON formatting overrides the basic formatting.

12. Click **Save**.

NOTE

You can resize a dashboard and drag it to a different location.

The dashboard is responsive and automatically adjusts to the display, but there is no absolute position.

Add links in the dashboard tables

To add links to the dashboard table cells add the following JSON code snippet in the Advanced Options:

```
{
  "sortable": true,
  "resizable": true,
  "columns": [{
    "template": 'Open',
    "width": 80
  }, {
    "field": "Name",
    "title": "Name",
    "width": 100
  }, {
    "field": "Category",
    "title": "Category",
    "width": 100
  }, {
    "field": "Type",
    "title": "Type",
    "width": 100
  }, {
    "field": "Team",
    "title": "Team",
    "width": 100
  }, {
    "field": "Scenarios",
    "title": "Scenarios",
    "width": 100
  }, {
    "field": "StepDetails",
    "title": "Step Details",
    "width": 300
  }, {
    "field": "ExpectedResults",
    "title": "Expected Results",
    "width": 300
  }, {
    "field": "ActualResults",
    "title": "Actual Results",
    "width": 300
  }, {
    "field": "CaseNumber",
    "title": "Case Number",
    "width": 120
  }
  ]
}
```

JSON examples

[Create a doughnut chart](#)

```

{
  "chart": {
    "caption": "Split of Revenue by Product Categories",
    "subCaption": "Last year",
    "numberPrefix": "$",
    "paletteColors": "#0075c2,#1aaf5d,#f2c500,#f45b00,#8e0000,#34495e,#8e44ad,#aed6f1,#f0b27a,#b2babb,#2471a3" ,
    "bgColor": "#ffffff",
    "showBorder": "0",
    "use3DLighting": "0",
    "showShadow": "0",
    "enableSmartLabels": "0",
    "startingAngle": "310",
    "showLabels": "1",
    "showPercentValues": "1",
    "showLegend": "1",
    "legendShadow": "0",
    "legendBorderAlpha": "0",
    "defaultCenterLabel": "Total revenue: $64.08K",
    "centerLabel": "Revenue from $label: $value",
    "centerLabelBold": "1",
    "showTooltip": "1",
    "decimals": "0",
    "captionFontSize": "14",
    "subcaptionFontSize": "14",
    "subcaptionFontBold": "0",
    "useDataPlotColorForLabels": "1"}
}

```

Set green and red as the colors for positive and negative results

```

{
  "chart":{
    "palettecolors":"d5534e,6ec672"
  }
}

```

For more information about editing the JSON for dashboard tiles, see the [FusionCharts documentation](#).


V8.6

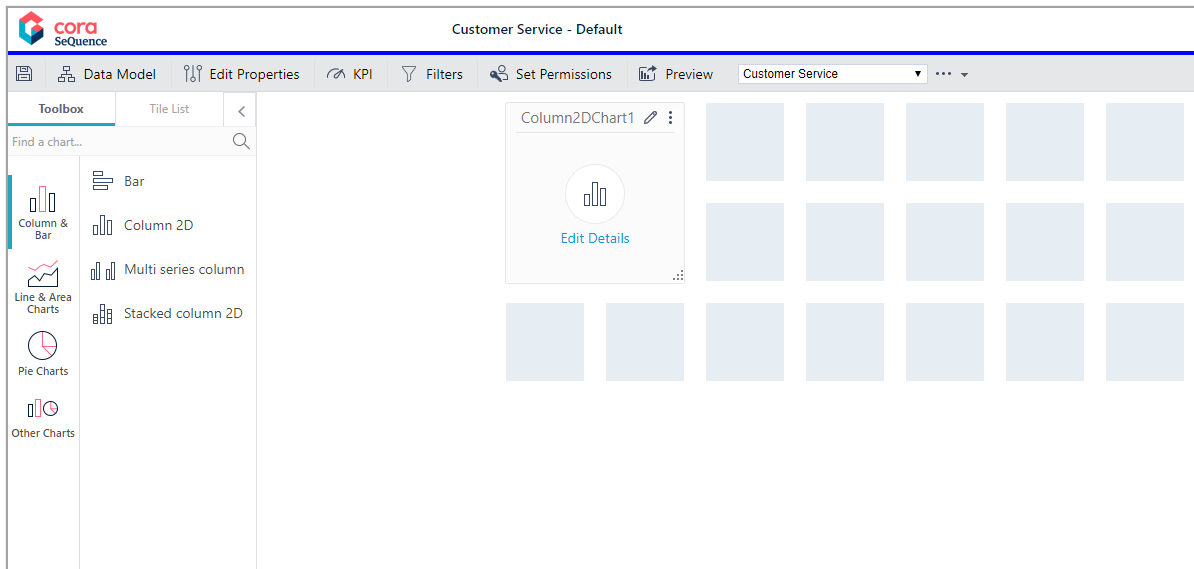
Prerequisites

Before you create a dashboard, you need to:

- Create a dashboard suite.
- Add the relevant queries to your data model.

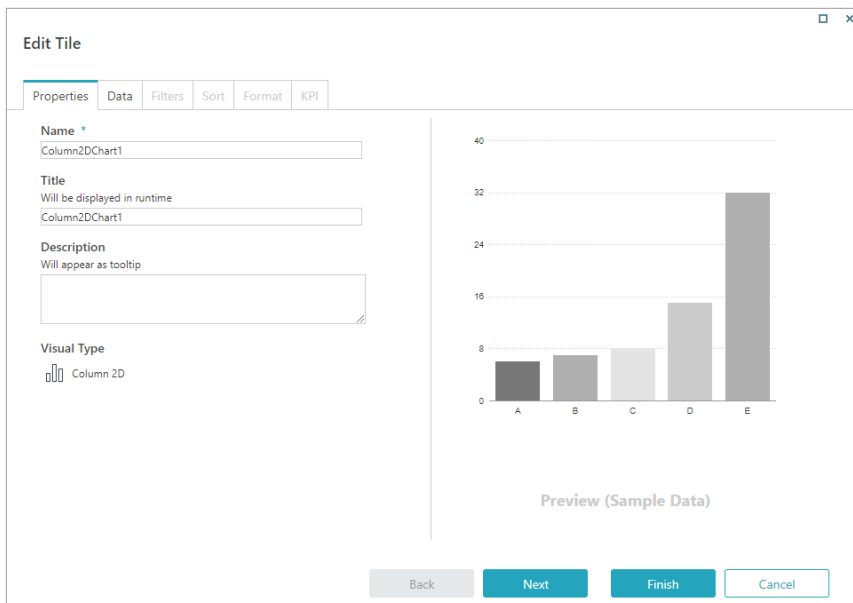
Create a new dashboard

1. On the Dashboard Suites page, locate the dashboard suite to which you want to add a dashboard, and click the edit button ().



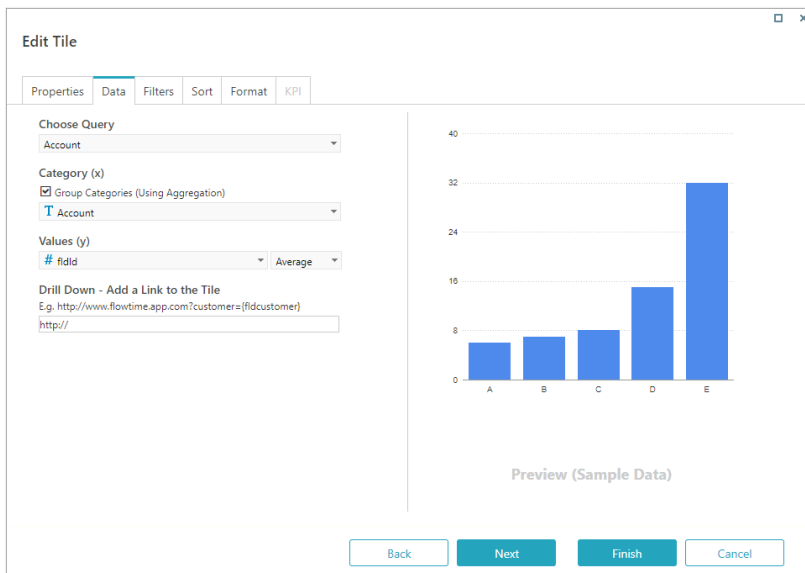
The new dashboard already includes a tile with a bar chart. You can remove it or edit it, and add additional charts.

2. To edit the selected chart, click **Edit Details**.



3. On the Properties tab:
 - a. Name: Enter a significant name for the chart.
 - b. Title: Enter the name to display on top of the chart when viewed in the Flowtime portal.
 - c. Description: Add a short description of the data displayed by the chart. This text displays as a tooltip when the chart is viewed in the Flowtime portal.
4. Click **Next**.
5. On the Data tab:
 - a. Select the relevant query as the data source for the chart.
 - b. If relevant for the chart, set the X and Y axis.
 - c. To add a link to the dashboard chart, under Drill Down, concatenate the process page that filters by the defined values.
Example:

```
http://{flowtimeserver.com}/ProcessRecords.aspx?workflowSpaceId=09132f64-8d34-43a4-adcc-b842116e1c4c&ft&Customer=eq({fldCustomer})
```



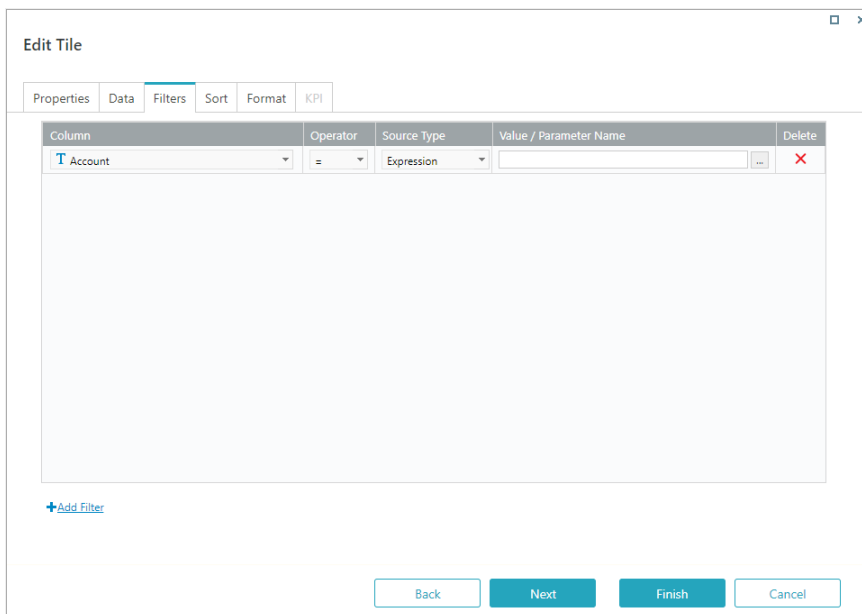
Tip: You can also use the Drill Down field to link the entire chart to a Flowtime page. For example, you can add the URL of the Active Processes page to a Number chart.

Copy the link and remove https:// and the server name:

`Process.aspx?workflowSpaceId=a0923039-78ae-464f-92ad-ffb8d6fc3583&workflowId=b844cc9e-21ea-4fc1-bb06-bee6ce77726c3`

6. Click **Next**.

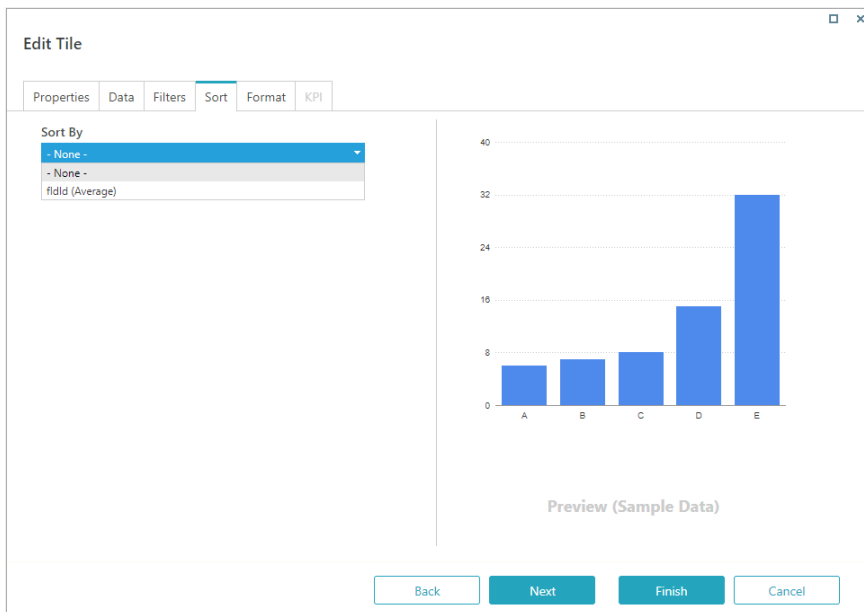
7. On the Filters tab, add filters to define the data displayed by the chart.



- o The Filters tab is populated only if the data query you selected contains filters.
- o Only *In* parameters display.
- o A common filter is the *Rt.CurrentUser()* parameter.
- o You can filter an analytics query using a query string parameter.
For more information see [Filter an Analytics Query Using a Query String Parameter](#).

8. Click **Next**.

9. On the Sort tab, define the parameter by which the data will be sorted in the chart.

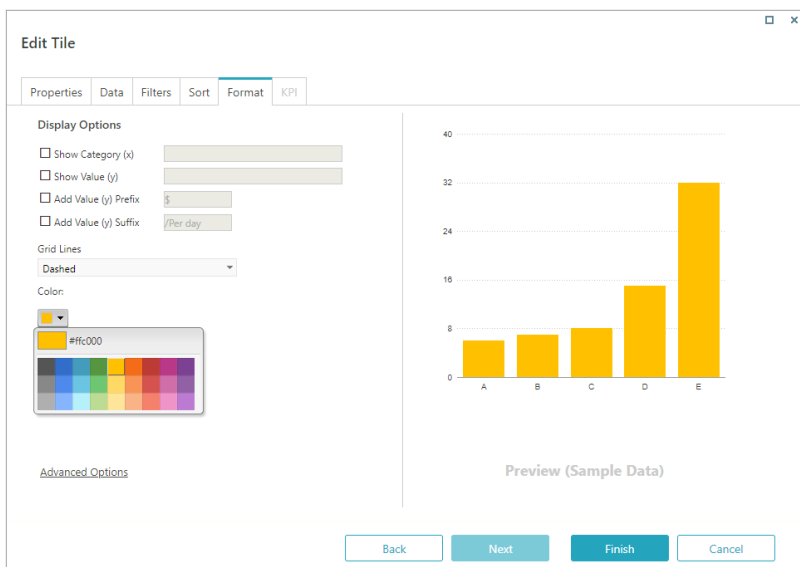


- o The Sort tab is available only when you select a lookup table as the data source.

10. Click **Next**.

11. On the Format tab, set up the chart look and feel:

- Display options: Select the elements to display on the chart.
- Legend: Define if the chart has a legend and where to display it.
- Color Palette: Set up the colors used in the chart.



- Use the advanced options to define formatting in JSON.
The JSON formatting overrides the basic formatting.

12. Click **Save**.

Note: You can resize a dashboard and drag it to a different location. The dashboard is responsive and automatically adjusts to the display, but there is no absolute position.

JSON examples

Create a doughnut chart

```

{
  "chart": {
    "caption": "Split of Revenue by Product Categories",
    "subCaption": "Last year",
    "numberPrefix": "$",
    "paletteColors": "#0075c2,#1aaf5d,#f2c500,#f45b00,#8e0000,#34495e,#8e44ad,#aed6f1,#f0b27a,#b2babb,#2471a3" ,
    "bgColor": "#ffffff",
    "showBorder": "0",
    "use3DLighting": "0",
    "showShadow": "0",
    "enableSmartLabels": "0",
    "startingAngle": "310",
    "showLabels": "1",
    "showPercentValues": "1",
    "showLegend": "1",
    "legendShadow": "0",
    "legendBorderAlpha": "0",
    "defaultCenterLabel": "Total revenue: $64.08K",
    "centerLabel": "Revenue from $label: $value",
    "centerLabelBold": "1",
    "showTooltip": "1",
    "decimals": "0",
    "captionFontSize": "14",
    "subcaptionFontSize": "14",
    "subcaptionFontBold": "0",
    "useDataPlotColorForLabels": "1"}
}

```

Set green and red as the colors for positive and negative results

```

{
  "chart":{
    "palettecolors":"d5534e,6ec672"
  }
}

```

For more information about editing the JSON for dashboard tiles, see the [FusionCharts documentation](#).

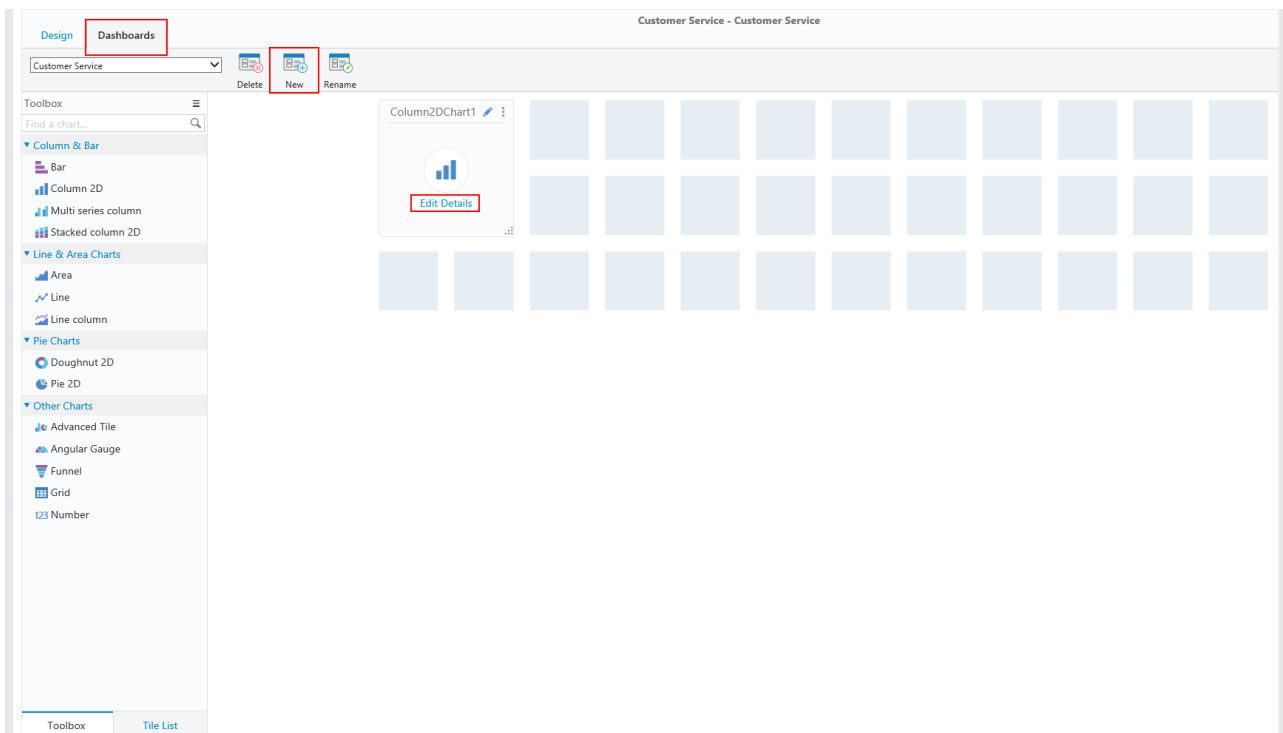
V8.4-8.5

Prerequisites

- Create a dashboard suite.
- Add the relevant queries to your data model.

Create a New Dashboard

In the Dashboard Suite canvas, click the **Dashboards** tab > **New** > **Edit Details**.




Properties Tab

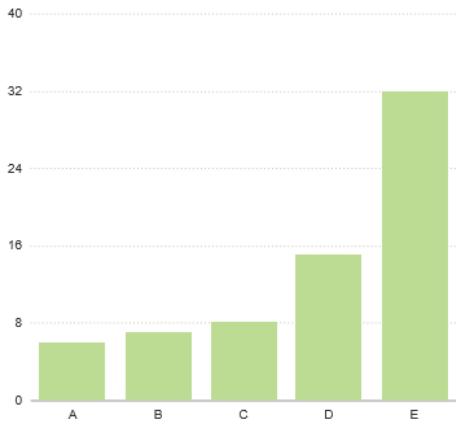
Edit Tile

Properties | Data | Filters | Sort | Format | KPI

Name *

Title
 Will be displayed in runtime

Visual Type
 Column 2D



Category	Value
A	6
B	7
C	8
D	15
E	32

Preview (Sample Data)

Data Tab

- Drill Down: concatenate the process page that filters by the defined values.
- Example:
[http://{{flowtimeserver.com}}/ProcessRecords.aspx?workflowSpaceId=09132f64-8d34-43a4-adcc-b842116e1c4c&ft&Customer=eq\({fldCustomer}\)](http://{{flowtimeserver.com}}/ProcessRecords.aspx?workflowSpaceId=09132f64-8d34-43a4-adcc-b842116e1c4c&ft&Customer=eq({fldCustomer}))

Edit Tile

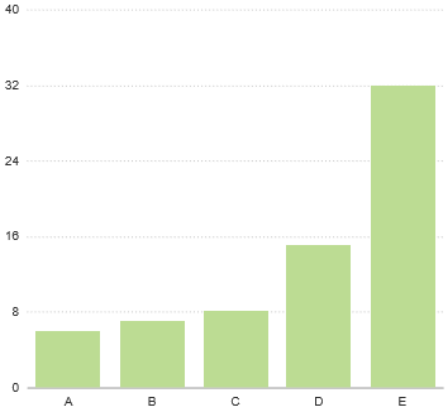
Properties Data Filters Sort Format KPI

Choose Query
Account Priority

Category (x)
 Group Categories (Using Aggregation)
AccountPriority

Values (y)
fldId Sum

Drill Down - Add a Link to the Tile
E.g. <http://www.flowtime.app.com?customer={fldcustomer}>
http://



Category	Value
A	6
B	7
C	8
D	15
E	32

Preview (Sample Data)

Back Next Finish Cancel

Filters Tab

- This section is only populated if the data query you selected contains filters.
- Only *In* parameters display.
- A common filter is the *Rt.CurrentUser()* parameter.
- You can filter an analytics query using a query string parameter.
For more information see [Filter an Analytics Query Using a Query String Parameter](#).

Edit Tile

Properties Data **Filters** Sort Format KPI

Column	Operator	Source Type	Value / Parameter Name	Delete
# fldId	=	Expression		X

+ [Add Filter](#)

Back Next Finish Cancel

Sort Tab

- Only available when you select a lookup table as the data source.

Edit Tile

Properties Data Filters **Sort** Format KPI

Sort By

- None -
- None -
- fldId (Sum)**

Category	Value
A	6
B	7
C	8
D	15
E	32

Preview (Sample Data)

Back Next Finish Cancel

Format Tab

Use the advanced options to define formatting in JSON. The JSON formatting overrides the basic formatting.

Edit Tile

Properties Data Filters Sort **Format** KPI

Display Options

Show Category (x)

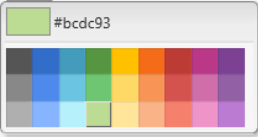
Show Value (y)

Add Value (y) Prefix

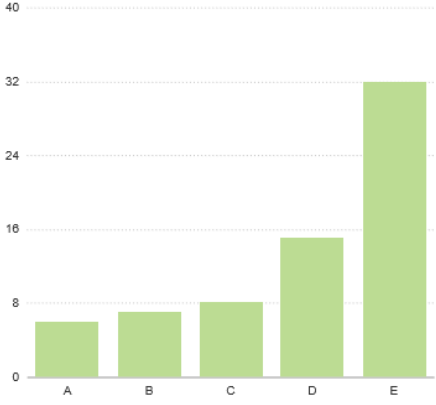
Add Value (y) Suffix

Grid Lines

Color:



[Advanced Options](#)



Category	Value
A	6
B	7
C	8
D	15
E	32

Preview (Sample Data)

Back Next **Finish** Cancel

Note: You can click-and-drag a dashboard beyond the tiles that appear on the canvas by default. The dashboard is responsive and automatically adjusts to the display, but there is no absolute position.

JSON Example: Doughnut Chart

For more information about editing the JSON for dashboard tiles, see the [FusionCharts documentation](#).

```
{
  "chart": {
    "caption": "Split of Revenue by Product Categories",
    "subCaption": "Last year",
    "numberPrefix": "$",
    "paletteColors": "#0075c2,#1aaf5d,#f2c500,#f45b00,#8e0000,#34495e,#8e44ad,#aed6f1,#f0b27a,#b2babb,#2471a3" ,
    "bgColor": "#ffffff",
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    "showShadow": "0",
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    "startingAngle": "310",
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    "showPercentValues": "1",
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    "legendBorderAlpha": "0",
    "defaultCenterLabel": "Total revenue: $64.08K",
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    "centerLabelBold": "1",
    "showTooltip": "1",
    "decimals": "0",
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    "useDataPlotColorForLabels": "1"}
}
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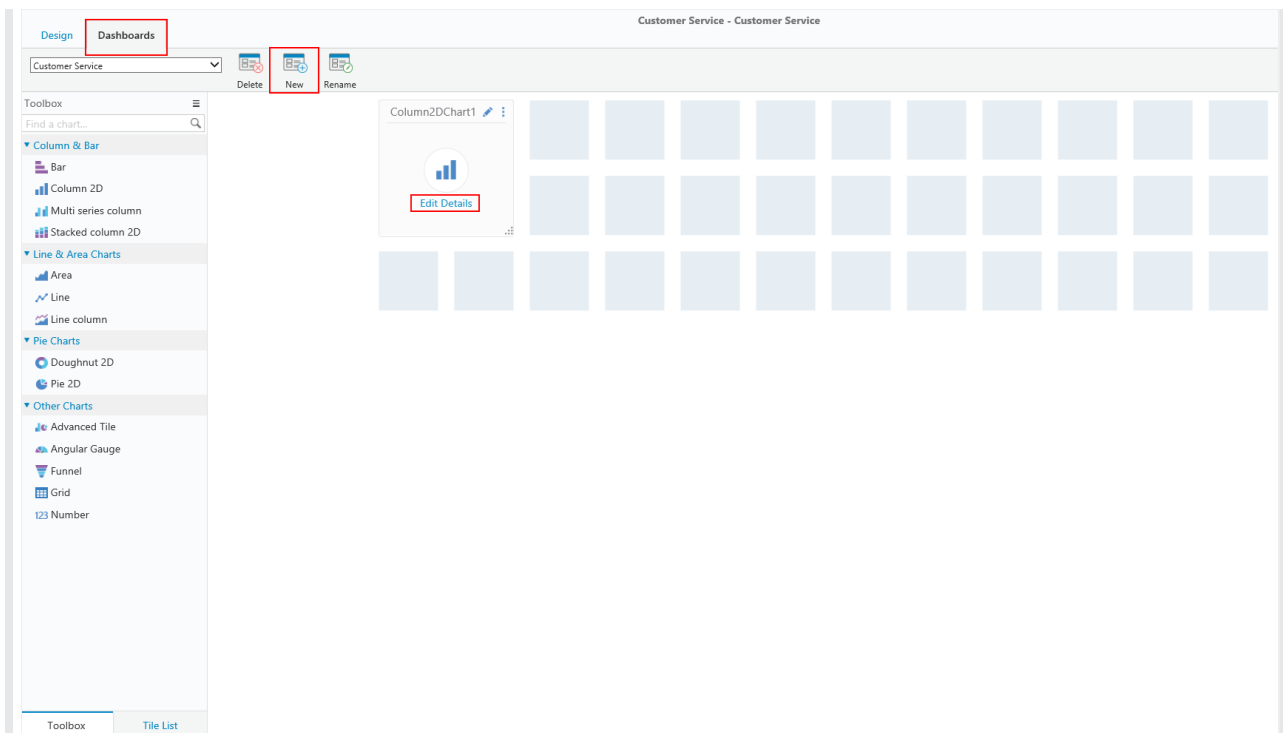
V8.3

Prerequisites

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Create a New Dashboard

In the Dashboard Suite canvas, click the **Dashboards** tab > **New** > **Edit Details**.



Properties Tab

Edit Tile

Properties | Data | Filters | Sort | Format | KPI

Name *

Title
 Will be displayed in runtime

Visual Type
 Column 2D

Category	Value
A	6
B	7
C	8
D	15
E	32

Preview (Sample Data)

Data Tab

- Aggregation is only enabled for lookup table queries.
- Drill Down: concatenate the process page that filters by the defined values.
- Example: [http://{flowtimeserver.com}/ProcessRecords.aspx?workflowSpaceId=09132f64-8d34-43a4-adcc-b842116e1c4c&ft&Customer=eq\({fldCustomer}\)](http://{flowtimeserver.com}/ProcessRecords.aspx?workflowSpaceId=09132f64-8d34-43a4-adcc-b842116e1c4c&ft&Customer=eq({fldCustomer}))

Edit Tile

Properties Data **Filters** Sort Format KPI

Choose Query
Account Priority

Category (x)
 Group Categories (Using Aggregation)
AccountPriority

Values (y)
fldld Sum

Drill Down - Add a Link to the Tile
E.g. <http://www.flowtime.app.com?customer={fldcustomer}>
http://

Preview (Sample Data)

Back Next Finish Cancel

Filters Tab

- This section is only populated if the data query you selected contains filters.
- Only *In* parameters display.
- A common filter is the *Rt.CurrentUser()* parameter.

Edit Tile

Properties Data **Filters** Sort Format KPI

Column	Operator	Source Type	Value / Parameter Name	Delete
# fldld	=	Expression		<input type="checkbox"/>

+ Add Filter

Back Next Finish Cancel

Sort Tab

- Only available when you select a lookup table as the data source.

Edit Tile

Properties Data Filters **Sort** Format KPI

Sort By

- None -
- None -
- field (Sum)

Category	Value
A	6
B	7
C	8
D	15
E	32

Preview (Sample Data)

Back Next Finish Cancel

Format Tab

Use the advanced options to define formatting in JSON. The JSON formatting overrides the basic formatting.

Edit Tile

Properties Data Filters Sort **Format** KPI

Display Options

Show Category (x)

Show Value (y)

Add Value (y) Prefix

Add Value (y) Suffix

Grid Lines
Dashed

Color:

[Advanced Options](#)

Category	Value
A	6
B	7
C	8
D	14
E	32

Preview (Sample Data)

Back Next **Finish** Cancel

Note: You can click-and-drag a dashboard beyond the tiles that appear on the canvas by default. The dashboard is responsive and automatically adjusts to the display, but there is no absolute position.

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    #2471a3" ,
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    "showBorder": "0",
    "use3DLighting": "0",
    "showShadow": "0",
    "enableSmartLabels": "0",
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    "showPercentValues": "1",
    "showLegend": "1",
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    "captionFontSize": "14",
    "subcaptionFontSize": "14",
    "subcaptionFontBold": "0",
    "useDataPlotColorForLabels": "1"}
}
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