

Create an Analytics Dashboard Suite

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v8.3-8.4

Overview

Create an Analytics dashboard suite to customize the dashboards that display for Flowtime user. In this sample, the dashboard suite consists of dashboards for a customer service agent.



Create an Analytics Dashboard Suite

To create a dashboard suite, navigate to **Administration > Analytics > Dashboard Suites**.

The screenshot shows the 'Cora Analytics' interface. The top navigation bar includes the Cora logo, 'Welcome Alex Fiedler', and a 'Logout' button. The left sidebar shows a navigation menu with 'Administration' selected, and 'Analytics' and 'Dashboard Suites' highlighted. The main content area is titled 'Dashboard Suites' and contains a table with columns for Edit, Name, Description, Container, Created At, Duplicate, Manage Versions, and Delete. The table lists several dashboard suites, including 'OpsManagerCasesDashboard' and 'TeamLeaderDashboard' in the 'HotOperations' container, and multiple copies of these dashboards in the 'Default' container. At the bottom of the table, there are buttons for '+ Add Dashboard Suite' and 'Import Dashboard Suite'.

Edit	Name	Description	Container	Created At	Duplicate	Manage Versions	Delete
	OpsManagerCasesDashboard		HotOperations	3/29/2017 1:27:57 PM			
	TeamLeaderDashboard		HotOperations	3/30/2017 1:17:53 AM			
	OpsManagerCasesDashboard		aa	12/19/2017 2:31:12 PM			
	TeamLeaderDashboard		aa	12/19/2017 2:31:48 PM			
	OpsManagerCasesDashboard Copy		Default	12/19/2017 10:38:28 AM			
	OpsManagerCasesDashboard Copy2		Default	12/19/2017 2:59:50 PM			
	OpsManagerCasesDashboard Copy3		Default	12/19/2017 3:00:44 PM			
	OpsManagerCasesDashboard Copy4		Default	12/19/2017 7:28:54 PM			
	TeamLeaderDashboard Copy		Default	12/19/2017 2:31:13 PM			
	TeamLeaderDashboard Copy3		Default	12/19/2017 2:41:04 PM			

Define Dashboard Suite Properties

Follow these parameters when you define the dashboard suite properties.

- **Container:** the value must be **Default**.
- **Authorization Policy:** the value must be **Role Based Permission**.

Create New Dashboard Suite

Name *

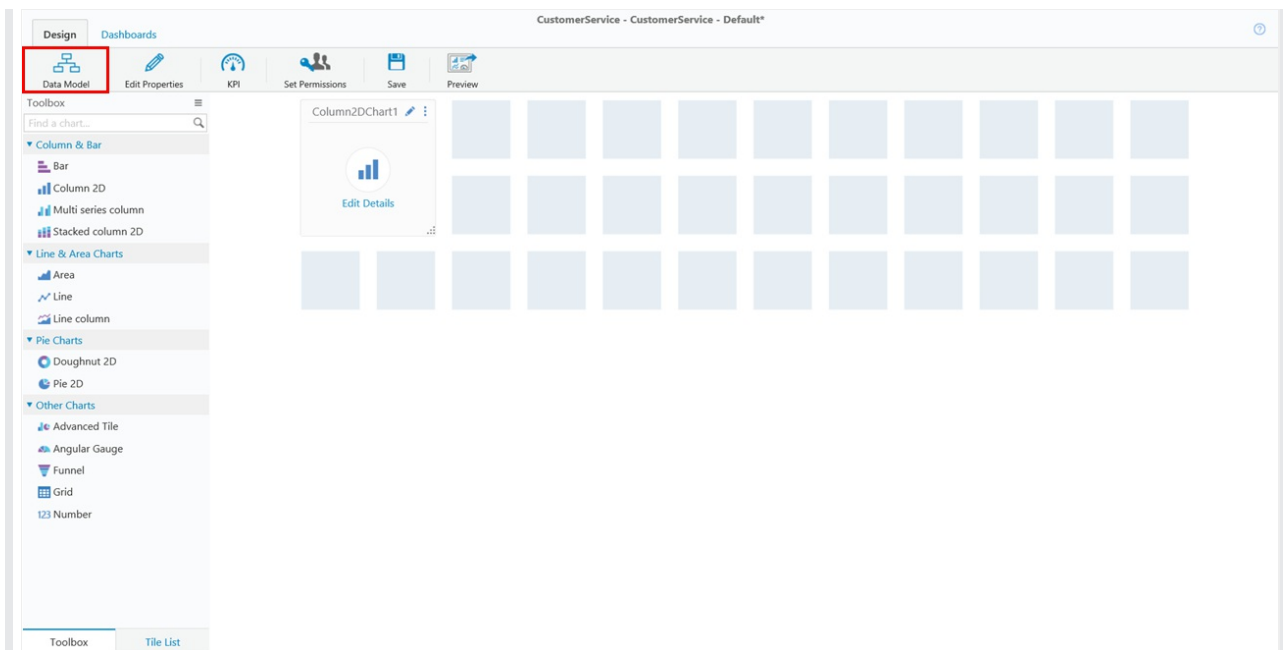
Alias *
Enter the Dashboard Suite's alias to be displayed in runtime

Container
Keep "Default" unless you want to change Hot Operations dashboards

Authorization Policy
Keep "Role Based" unless you want to change Hot Operations dashboards

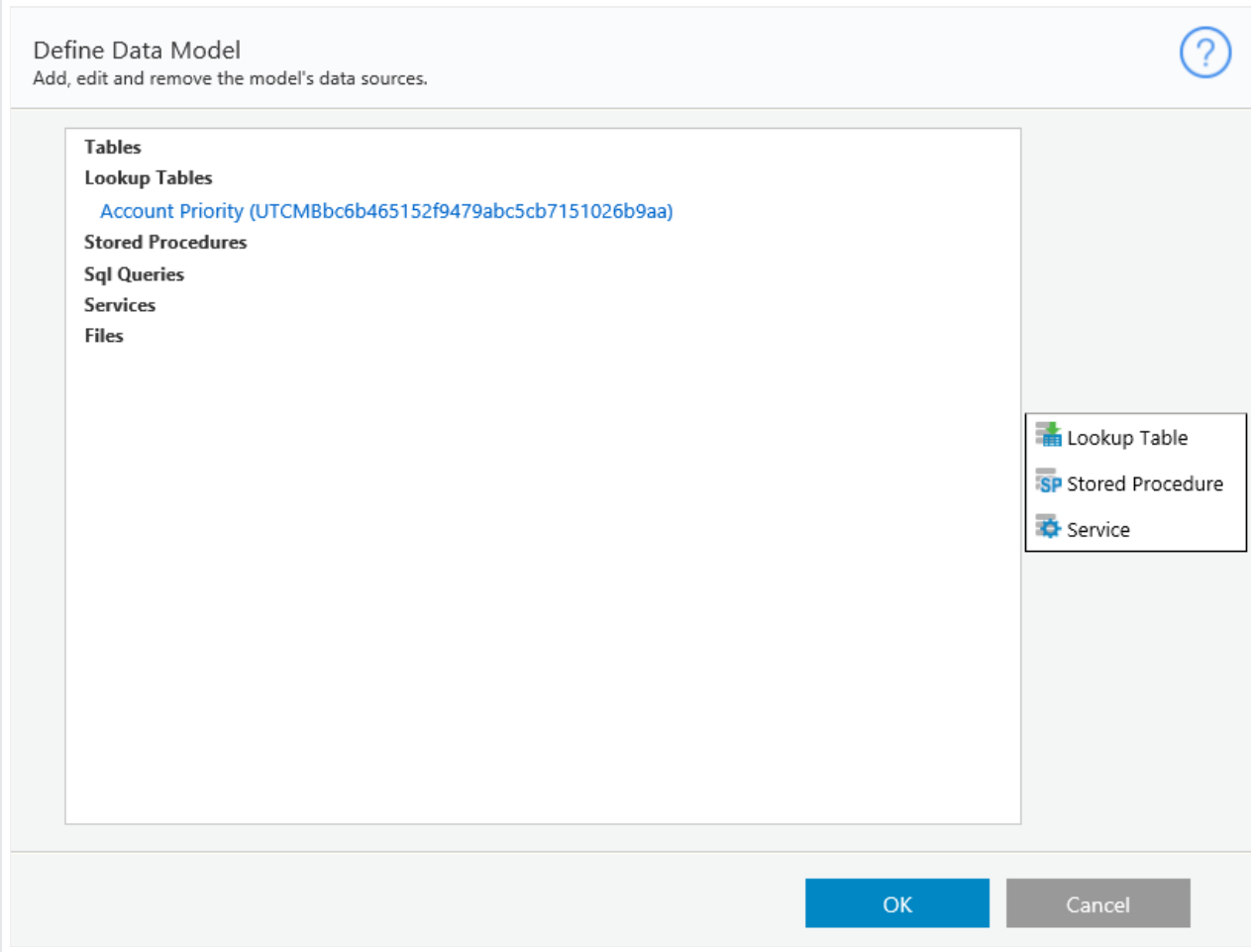
Description

Define the Data Model



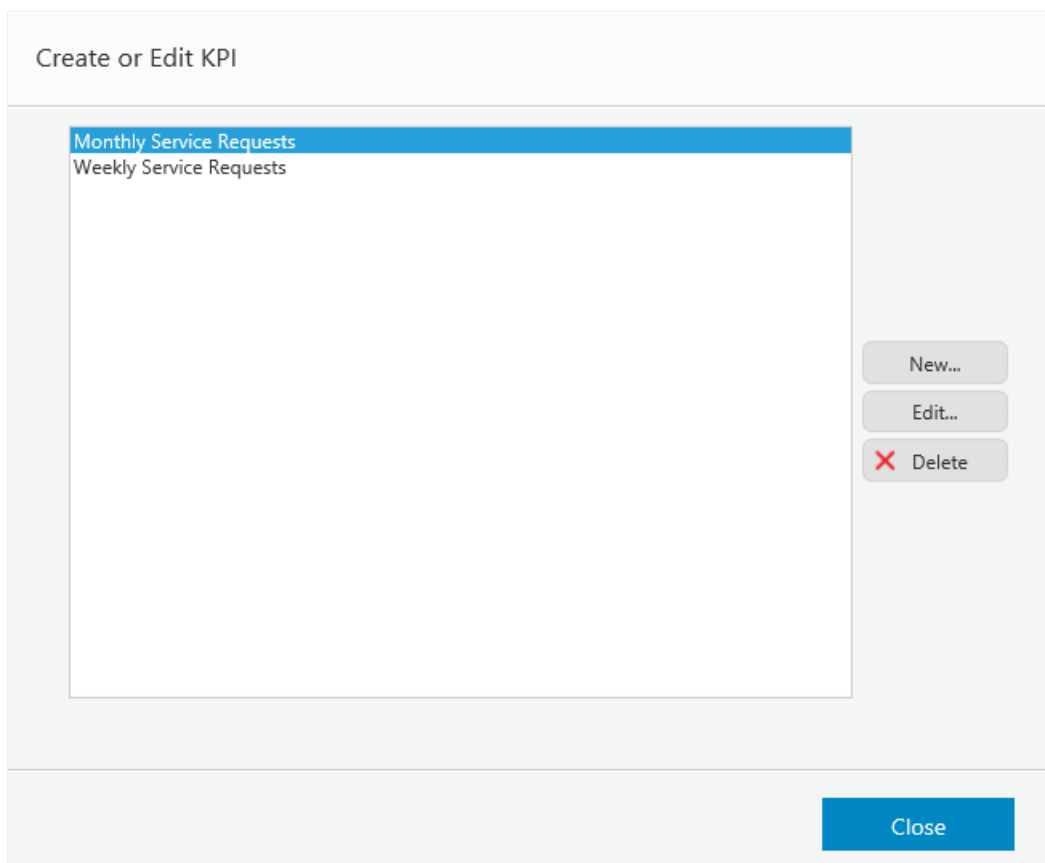
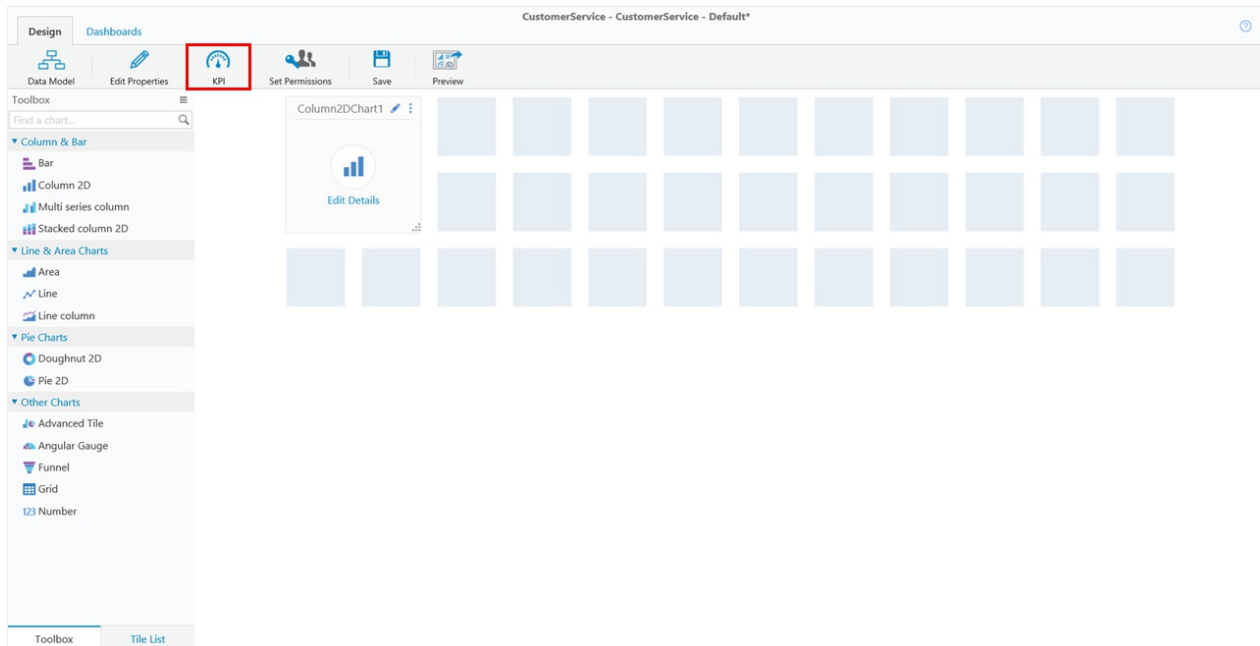
The data source that defines the dashboard.

- Table
- Lookup Table
- Stored Procedure
- Service
- File



Define KPI




Set key performance indicators (levels of achievement) for your team to set team goals and rate performance.



New KPI

Name *

Minimum value *

Name	Color	Maximum Value	Delete
<input type="text" value="Low"/>		<input type="text" value="400.00"/>	<input type="button" value="X"/>
<input type="text" value="Average"/>		<input type="text" value="750.00"/>	<input type="button" value="X"/>
<input type="text" value="High"/>		<input type="text" value="1250.00"/>	<input type="button" value="X"/>

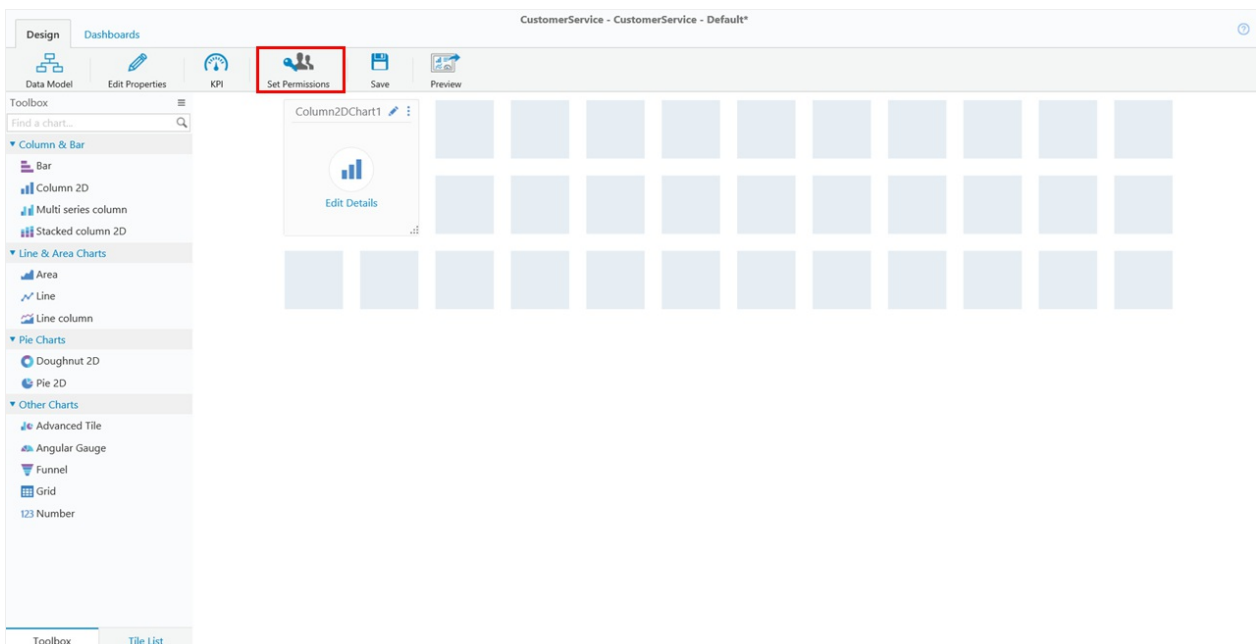
[+ Add Segment](#)

OK

Cancel

Set Permissions

Set permissions for the dashboard suite to control user access by adding users or groups to specific security roles.



The screenshot shows the Power BI Desktop interface. The title bar reads "CustomerService - CustomerService - Default*". The ribbon is set to "Dashboards" and includes the following options: Data Model, Edit Properties, KPI, Set Permissions (highlighted with a red box), Save, and Preview. The "Toolbox" pane on the left is open, displaying a search bar and a list of chart types under various categories: Column & Bar (Bar, Column 2D, Multi series column, Stacked column 2D), Line & Area Charts (Area, Line, Line column), Pie Charts (Doughnut 2D, Pie 2D), and Other Charts (Advanced Tile, Angular Gauge, Funnel, Grid, Number). The main workspace shows a grid of chart tiles, with one tile titled "Column2DChart1" selected and its "Edit Details" dialog box open.



Security Data Suite Roles

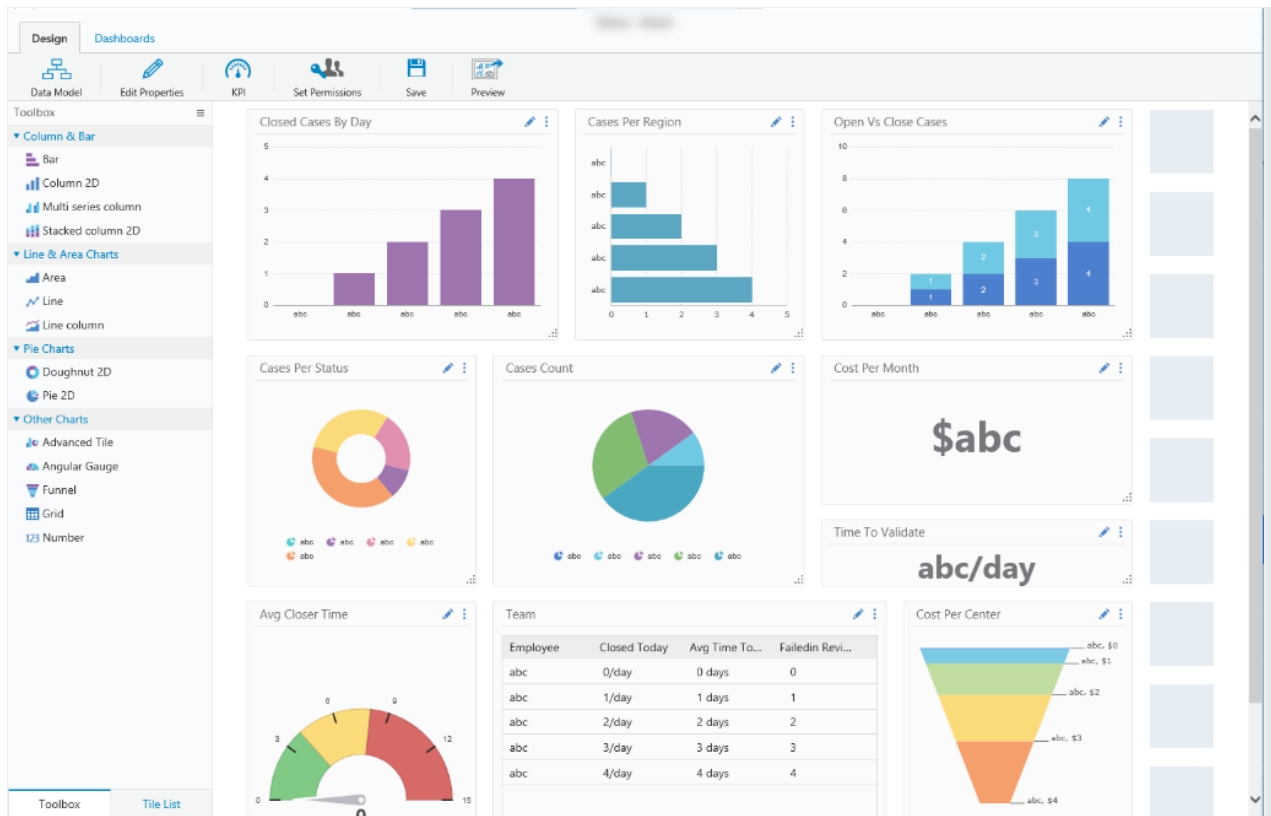
Security Role Name	Allowed	Denied	Populated	Assign Everyone	Edit Assigned
Reader	Read		No	<input type="checkbox"/>	

Close

v8.5

Overview

Create an Analytics dashboard suite to customize the dashboards that display for Flowtime users. In this sample, the dashboard suite consists of dashboards for a customer service agent.



Create an Analytics Dashboard Suite

To create a dashboard suite, navigate to **Administration > Analytics > Dashboard Suites**.

The image shows the Cora SeQuence Administration interface. The left sidebar contains a navigation menu with 'Administration' expanded, showing 'Analytics' and 'Dashboard Suites' (highlighted with a red box). The main content area is titled 'Dashboard Suites' and displays a table of dashboard suites. The table has columns for Edit, Name, Description, Container, Created At, Duplicate, Manage Versions, and Delete. The 'Add Dashboard Suite' button is highlighted with a red box.

Edit	Name	Description	Container	Created At	Duplicate	Manage Versions	Delete
	OpsManagerCasesDashboard		HotOperations	3/29/2017 1:27:57 PM			
	TeamLeaderDashboard		HotOperations	3/30/2017 1:17:53 AM			
	OpsManagerCasesDashboard		aa	12/19/2017 2:31:12 PM			
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	OpsManagerCasesDashboard Copy4		Default	12/19/2017 7:28:54 PM			
	TeamLeaderDashboard Copy		Default	12/19/2017 2:31:13 PM			
	TeamLeaderDashboard Copy3		Default	12/19/2017 2:41:04 PM			

Define Dashboard Suite Properties

For Analytics dashboard suites, the Container must be **Default**.

Create New Dashboard Suite

Name *

Alias *

Enter the Dashboard Suite's alias to be displayed in runtime

Container

Keep "Default" unless you want to change Hot Operations dashboards

Authorization Policy

Keep "Role Based" unless you want to change Hot Operations dashboards

Description

Create Dashboard Suite

Cancel

Define the Data Model

The data source that defines the dashboards' data.

The screenshot shows the 'Design' view of a dashboard suite named 'CustomerService - CustomerService - Default*'. The 'Data Model' tab is selected and highlighted with a red box. The interface includes a toolbar with icons for 'Data Model', 'Edit Properties', 'KPI', 'Set Permissions', 'Save', and 'Preview'. A 'Toolbox' on the left lists various chart types: Column & Bar (Bar, Column 2D, Multi series column, Stacked column 2D), Line & Area Charts (Area, Line, Line column), Pie Charts (Doughnut 2D, Pie 2D), and Other Charts (Advanced Tile, Angular Gauge, Funnel, Grid, Number). The main workspace displays a grid of chart tiles, with one 'Column2DChart1' tile selected and its 'Edit Details' dialog open.

The data source that defines the dashboard.

- Table

- Lookup Table
- Stored Procedure
- Service
- File

Define Data Model ?

Add, edit and remove the model's data sources.

Tables

Lookup Tables


[Account Priority \(UTCMBbc6b465152f9479abc5cb7151026b9aa\)](#)


Stored Procedures


Sql Queries

Services

Files

 Lookup Table

 Stored Procedure

 Service

OK **Cancel**

Define KPI

Set key performance indicators (levels of achievement) for your team to set team goals and rate performance.

CustomerService - CustomerService - Default*

Design Dashboards

Data Model Edit Properties **KPI** Set Permissions Save Preview

Toolbox

Find a chart...

- Column & Bar
 - Bar
 - Column 2D
 - Multi series column
 - Stacked column 2D
- Line & Area Charts
 - Area
 - Line
 - Line column
- Pie Charts
 - Doughnut 2D
 - Pie 2D
- Other Charts
 - Advanced Tile
 - Angular Gauge
 - Funnel
 - Grid
 - Number

Column2DChart1 Edit Details

Create or Edit KPI

Monthly Service Requests

Weekly Service Requests

New...

Edit...

✖ Delete

Close

Monthly Service Requests

Weekly Service Requests

New KPI

Name *

Minimum value *

Name	Color	Maximum Value	Delete
<input type="text" value="Low"/>	<input type="color" value="#FF0000"/>	<input type="text" value="400.00"/>	<input type="button" value="X"/>
<input type="text" value="Average"/>	<input type="color" value="#FFD700"/>	<input type="text" value="750.00"/>	<input type="button" value="X"/>
<input type="text" value="High"/>	<input type="color" value="#008000"/>	<input type="text" value="1250.00"/>	<input type="button" value="X"/>

[+ Add Segment](#)

OK

Cancel

Set Permissions

Set permissions for the dashboard suite to control user access by adding users or groups to specific security roles.

The screenshot shows the 'Set Permissions' dialog in a dashboard design tool. The title bar reads 'CustomerService - CustomerService - Default*'. The 'Design' tab is active, and the 'Dashboards' sub-tab is selected. The toolbar includes icons for 'Data Model', 'Edit Properties', 'KPI', 'Set Permissions' (highlighted with a red box), 'Save', and 'Preview'. The 'Toolbox' on the left lists various chart types: Column & Bar (Bar, Column 2D, Multi series column, Stacked column 2D), Line & Area Charts (Area, Line, Line column), Pie Charts (Doughnut 2D, Pie 2D), and Other Charts (Advanced Tile, Angular Gauge, Funnel, Grid, Number). The main workspace shows a grid of chart tiles, with one tile titled 'Column2DChart1' selected and its 'Edit Details' dialog open.



Security Data Suite Roles

Security Role Name	Allowed	Denied	Populated	Assign Everyone	Edit Assigned
Reader	Read		No	<input type="checkbox"/>	

Close