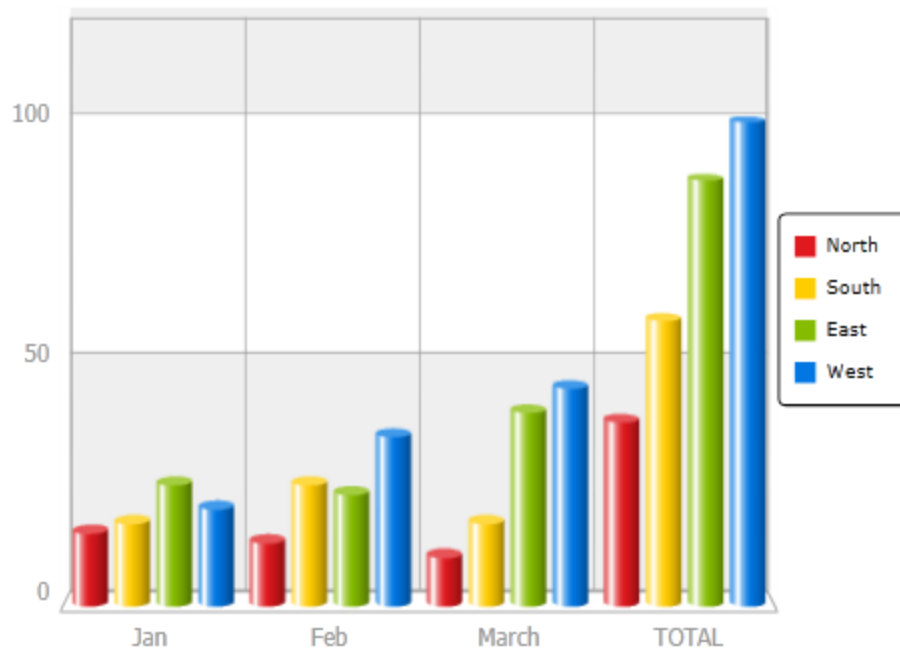




# Dashboards v4.1

For Portal Framework P4

Learn how to create and manage Dashboards in the Passageways portal.



8 North 3rd Street, Suite 101

Lafayette, IN 47901

765-535-1880

[support@passageways.com](mailto:support@passageways.com)

**Watch for Alert Icons:**



**Helpful tips and hints**



**Additional important information**

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## Section 1. Overview

The Dashboards Module allows you to create gauges that pull the data from multiple contributing departments into one graphical format, thus providing a "snapshot" of performance. Gauges are used as indicators for a particular piece of information, a combination of Key Performance Indicators, or overall performance. Dashboards is a transparent and efficient way for all managers and staff to visualize goals, as well as monitor progress.

For the Dashboards to be displayed on a portal page, Microsoft Silverlight must be installed on every end-user's computer. If the software is not installed, the user will be prompted to install it when then try to view a Visualization.

## Section 2. The Module Properties

The Dashboard Creator has one module configuration properties.

Property Name	Description	Example Property Value
ConnectionString	The connection string to the database where information is stored.	server=129.16.8.10;uid=sa;pwd=somepassword;database=Dashboards;







Be careful about changing any Module Properties. Remember you can always contact Passageway Support to make sure that your Module Properties are correctly set for your needs.

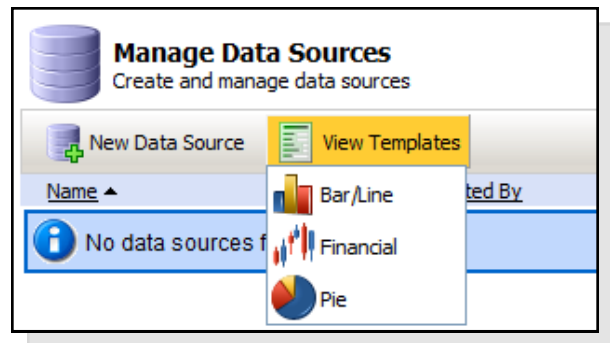
## Section 3. Managing Data Sources

The Dashboards Module allows you to visually display data from three different sources. This data can be pulled from a Microsoft Excel spreadsheet, a Microsoft SQL Server, or a spreadsheet that you manually input data into. You can also set the frequency the data is refreshed on a portal page. Make sure to take a look at the Templates to see the recommended way to set-up your Microsoft Excel data to create the best Visualization.

### A. Viewing the Data Source Templates



The Data Source Templates act as guidelines to creating a Microsoft Excel Data Source for a particular desired Dashboard Visualization. If you don't use these guidelines, your Visualization may not look accurate for your needs.

1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Click  **View Templates**;
5. Choose the Type of Visualization;
6. Open the file;
7. Use that file as a template for your data




### B. Uploading a Microsoft Excel Spreadsheet to be Used as a Data Source

After populating the desired template with your data, you can upload that spreadsheet as a Data Source for your Dashboard Visualization. To be able to upload your spreadsheet, you must have access to write to a Portal Document folder. If you are not sure if you do have the proper access, talk to your Portal Administrator about getting write access to a Portal Document folder. You can either upload the document directly to the Portal Documents folder or use Dashboards Manage Data Sources upload tool to upload the spreadsheet (see page 3).








1. Click  **Portal Documents**;
2. Click the desired Portal Document Repository folder;
3. Click  **Upload Document**;
4. Click **Browse...**;
5. Choose your Microsoft Excel Spreadsheet;
6. Click **OK**;
7. Click **OK**

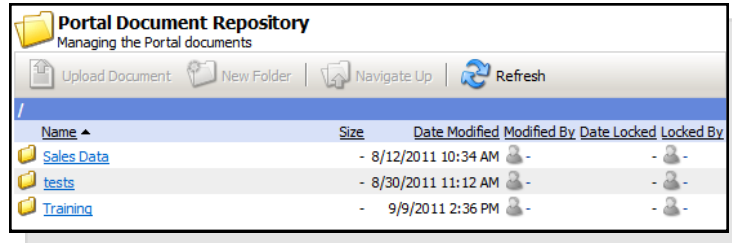


You will quickly be able to tell if you have write permissions to a Portal Document Repository folder. When you enter the folder, if the  Upload Document link is not clickable, then you do not have write permissions. If you do need these permissions, contact your portal administrator.

### C. Using Dashboards to Upload a Microsoft Excel Spreadsheet as a Data Source






After populating the desired template with your data, you can upload that spreadsheet as a Data Source for your Dashboard Visualization. To be able to upload your spreadsheet, you must have access to write to a Portal Document folder.

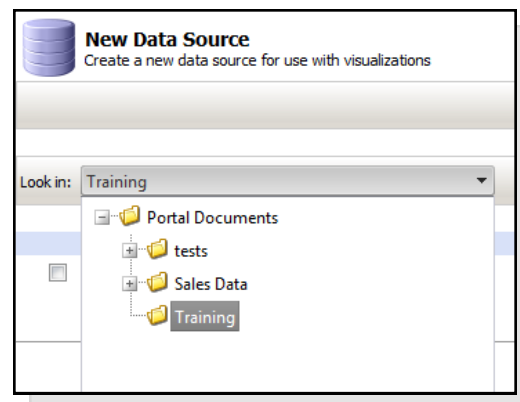
1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Click  **New Data Source**;
5. Click  **Microsoft Excel**;
6. Type a **Name**;
7. Type a **Description**;
8. Click **Next**;
9. Click  **Upload Document**;
10. Click the desired Portal Document Repository folder;
11. Click  **Upload Document**;
12. Click **Browse...**;
13. Choose your Microsoft Excel Spreadsheet;
14. Click **OK**;
15. Click **OK**



### D. Using a Microsoft Excel Spreadsheet as a Data Source






After uploading a spreadsheet to the a Portal Documents folder, that spreadsheet can be used as a Data Source to display a Dashboard Visualization.

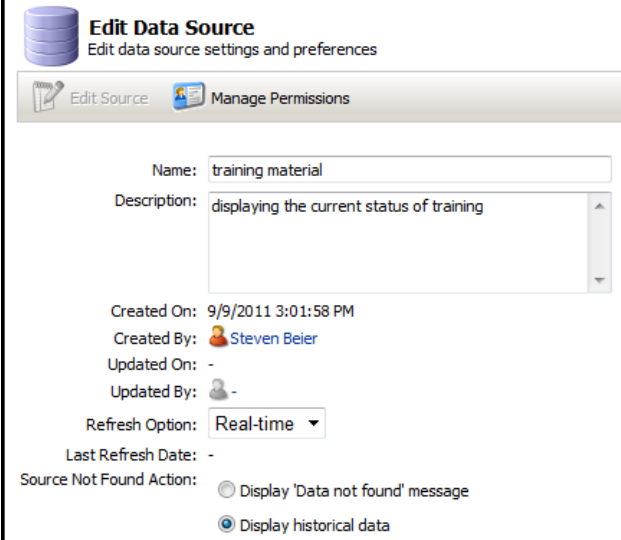
1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Click  **New Data Source**;
5. Click  **Microsoft Excel**;
6. Type a **Name**;
7. Type a **Description**;
8. Click **Next**;
9. Click the **Portal Documents** down arrow;
10. Click the desired Portal Document Repository folder;
11. Check the desired spreadsheet file;
12. Click **Next**;
13. Choose the desired **Sheet**;
14. Click **Preview**;
15. Click **Next**;
16. Choose the data's **Refresh Frequency**;
17. Choose **Source Not Found Action**;
18. Click **Next**;
19. Choose **Data Source Users**;
20. Choose **Data Source Admins**;
21. Click **Finish**



## E. Editing a Microsoft Excel Input Data Source




A Microsoft Excel Input Data Source can be edited by a user with the Data Source Admin permission at any time. The Name, Description, Source Not Found Action, and Permissions can all be edited.

1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Place your mouse pointer over the desired data source;
5. Click the drop down arrow;
6. Click  **Edit**;
7. Edit the **Name**;
8. Edit the **Description**;
9. Edit **Source Not Found Action**;
10. Click  **Manage Permissions**;
11. Choose **Data Source Users**;
12. Choose **Data Source Admins**;



## F. Deleting a Microsoft Excel Input Data Source

A Microsoft Excel Input Data Source can be deleted by a user with the Data Source Admin permission at any time. Deleting the Data Source deletes its connection to Dashboards and all created Visualizations based on that Data Source, but it does not delete the source file that is stored in Portal Documents.






1. Click **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Place your mouse pointer over the desired data source;
5. Click the drop down arrow;
6. Click **Delete**;
7. Click  **OK**

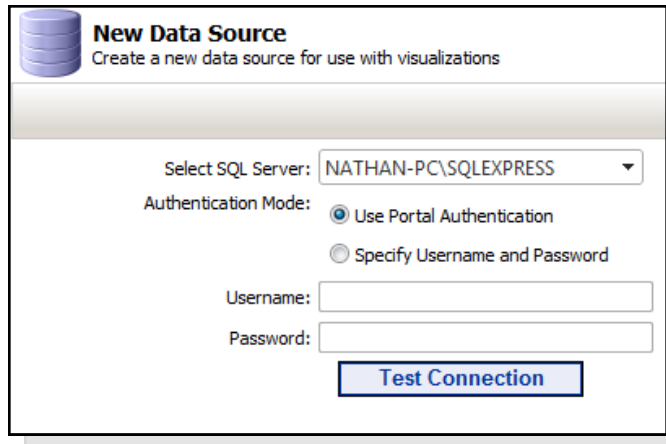


Data Source Admins can edit details about the Data Source and create Visualization based on that Data Source. Data Source Users can only create Visualizations based on that Data Source.

## G. Using a Microsoft SQL Server as a Data Source

The Dashboard Module allows users to access Microsoft SQL Server and pull information from databases. Knowledge of the desired SQL database and running queries is very important in using this tool. Users can select a SQL server that is running the SQL Server Brower Service.

1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Click  **New Data Source**;
5. Click  **Microsoft SQL Server**;
6. Type a **Name**;
7. Type a **Description**;
8. Click **Next**;
9. Select a SQL Server;
10. Choose the **Authentication Mode**;  
If **Specify Username and Password** is chosen;
  - i. Type **Username**;
  - ii. Type **Password**;
11. Click **Test Connection**;
12. Click **Next**;
13. **Select Database**;
14. Type a **Query**;
15. Click **Preview Data**;
16. Click **Next**;
17. Choose the data's **Refresh Frequency**;
18. Choose **Source Not Found Action**;
19. Click **Next**;
20. Choose **Data Source Users**;
21. Choose **Data Source Admins**;
22. Click **Finish**








The screenshot shows the 'New Data Source' configuration interface. At the top, there is a title 'New Data Source' and a subtitle 'Create a new data source for use with visualizations'. Below this, there are several fields and options:

- Select SQL Server:** A dropdown menu with 'NATHAN-PC\SQLEXPRESS' selected.
- Authentication Mode:** Two radio buttons: 'Use Portal Authentication' (selected) and 'Specify Username and Password'.
- Username:** An empty text input field.
- Password:** An empty text input field.
- Test Connection:** A blue button with white text.

## H. Editing a Microsoft Excel Input Data Source





A Microsoft SQL Server Data Source can be edited by a user with the Data Source Admin permission at any time. The Name, Description, Source Not Found Action, and Permissions can all be edited.

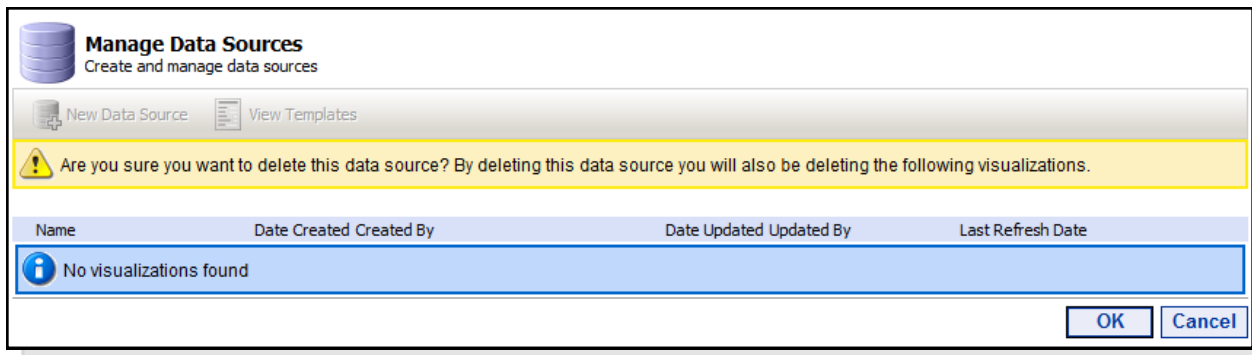
1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Place your mouse pointer over the desired data source;
5. Click the drop down arrow;
6. Click  **Edit**;
7. Edit the **Name**;
8. Edit the **Description**;
9. Edit the **Refresh Option**;
10. Edit **Source Not Found Action**;
11. Click  **Manage Permissions**;
12. Choose **Data Source Users**;
13. Choose **Data Source Admins**;
14. Click **OK**



## I. Deleting a Microsoft SQL Server Data Source






A Microsoft SQL Server Data Source can be deleted by a user with the Data Source Admin permission at any time. Deleting the Data Source deletes its connection to Dashboards and all created Visualizations based on that Data Source, but it does not delete the source file.

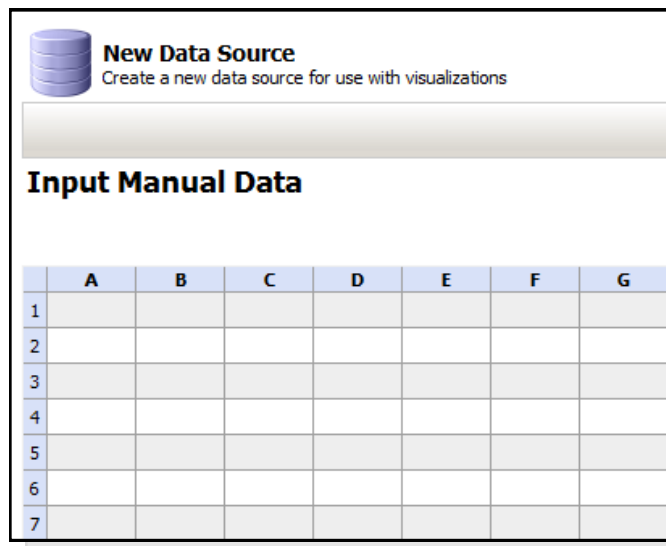
1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Place your mouse pointer over the desired data source;
5. Click the drop down arrow;
6. Click  **Delete**;
7. Click **OK**



## J. Using Manual Input as a Data Source

Instead of uploading a spreadsheet to the a Portal Documents folder, a spreadsheet can be created as a Data Source to display a Dashboard Visualization. It is best when creating a Manual Input Data Source is it is best to follow the example Templates (see page 2).







1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Click  **New Data Source**;
5. Click  **Manual Input**;
6. Type a **Name**;
7. Type a **Description**;
8. Enter data;
9. Click **Next**;
10. Choose **Source Not Found Action**;
11. Click **Next**;
12. Choose **Data Source Users**;
13. Choose **Data Source Admins**;
14. Click **Finish**

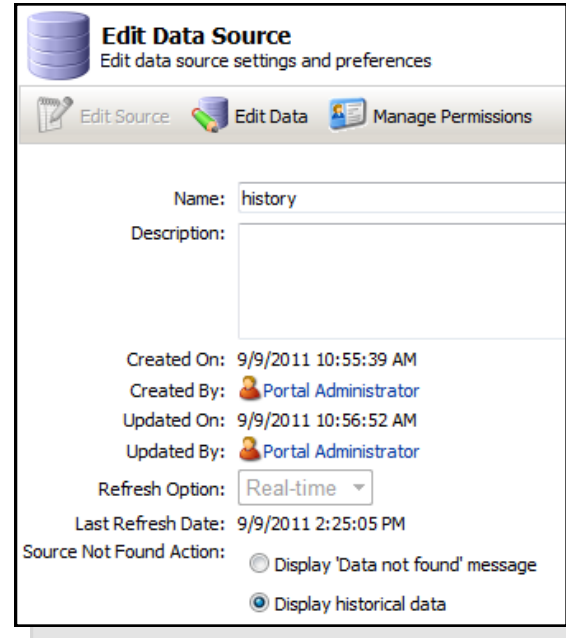


	A	B	C	D	E	F	G
1							
2							
3							
4							
5							
6							
7							

## K. Editing a Manual Input Data Source





A Manual Input Data Source can be edited by a user with the Data Source Admin permission at any time. The Name, Description, Source Not Found Action, Permissions, and Data can all be edited.

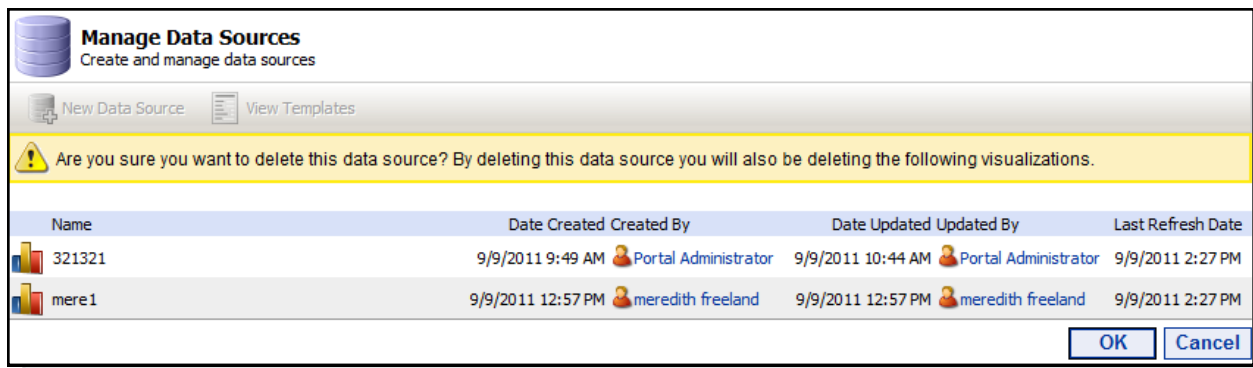
1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Place your mouse pointer over the desired data source;
5. Click the drop down arrow;
6. Click  **Edit**;
7. Edit the **Name**;
8. Edit the **Description**;
9. Edit **Source Not Found Action**;
10. Click  **Edit Data**;
11. Edit the Data;
12. Click  **Manage Permissions**;
13. Choose **Data Source Users**;
14. Choose **Data Source Admins**;



## L. Deleting a Manual Input Data Source

A Manual Input Data Source can be deleted by a user with the Data Source Admin permission at any time. Deleting the Data Source deletes its connection to Dashboards, all created Visualizations based on that Data Source, and the source file that is stored in Dashboards.

1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Data Sources**;
4. Place your mouse pointer over the desired data source;
5. Click the drop down arrow;
6. Click  **Delete**;
7. Click **OK**








Name	Date Created	Created By	Date Updated	Updated By	Last Refresh Date
321321	9/9/2011 9:49 AM	Portal Administrator	9/9/2011 10:44 AM	Portal Administrator	9/9/2011 2:27 PM
mere1	9/9/2011 12:57 PM	meredith freeland	9/9/2011 12:57 PM	meredith freeland	9/9/2011 2:27 PM

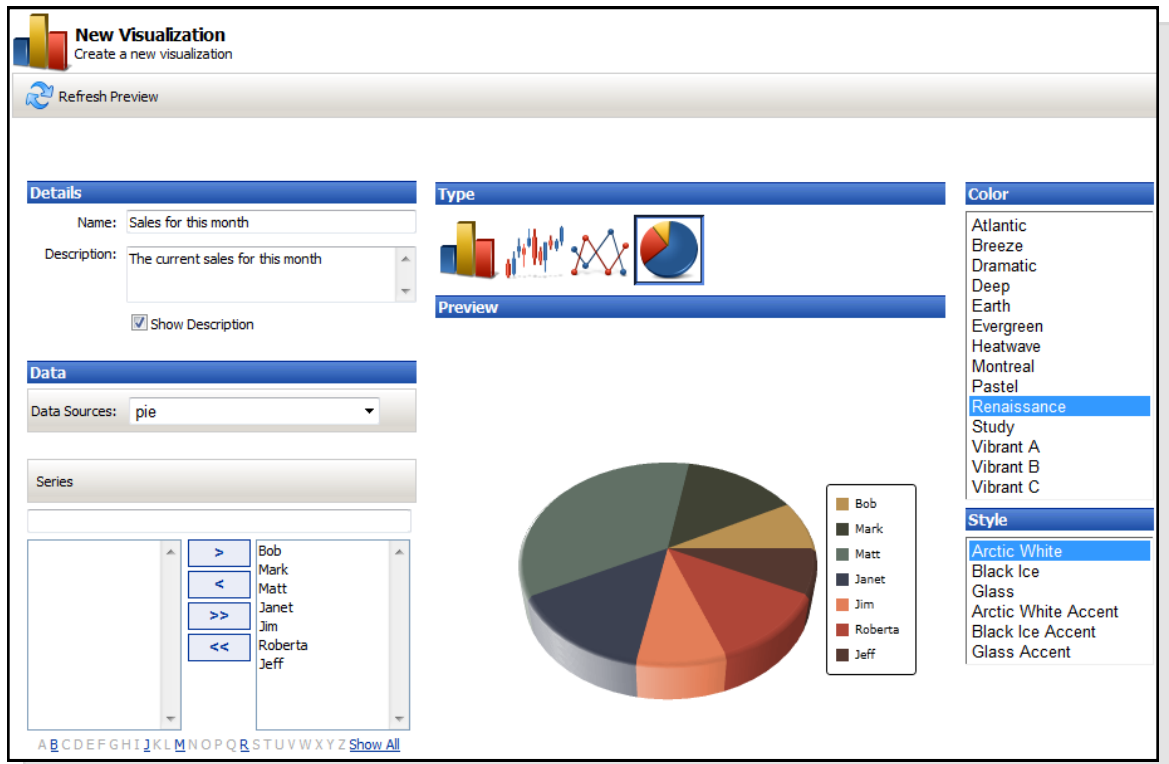
## Section 4. Managing Visualizations

The Dashboards Module allows you to visually display data on any portal page. These Visualizations are shown in two main ways by using Charts or Gauges.

### A. Creating a Chart Visualization







The Chart Visualization is used to compare a single series of data over time (financial or line charts), multiple series of data over time (financial or line charts), or multiple series of data at a fixed time (bar or pie charts).

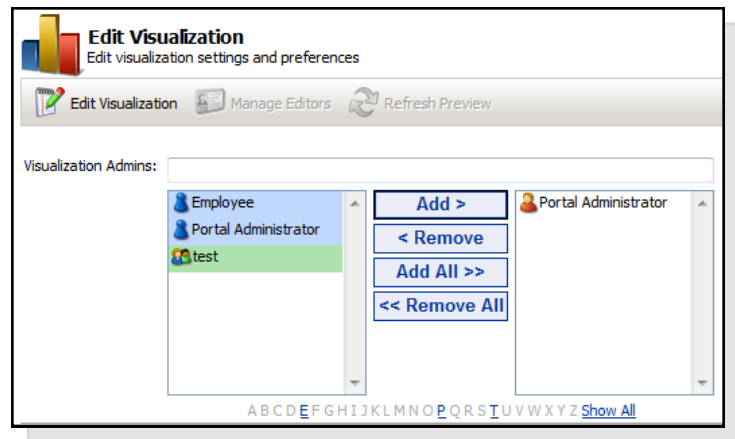
1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Visualizations**;
4. Click  **New Visualization**;
5. Click  **Chart**;
6. **Select Data Source**;
7. Click **Next**;
8. Choose a chart **Type**;
9. Type a **Name**;
10. Type a **Description**;
11. Choose to **Include Description** on a portal page;
12. Choose the Data **Series**;
13. Choose **Color**;
14. Choose **Style**;
15. Click **Next**;
16. Choose **Visualization Admins**;
17. Click **Finish**



## B. Editing a Chart Visualization





The Chart Visualization can be edited at any time by the Visualization Admins. Editing a Visualization will automatically update a Visualization Island on a portal page that is displaying that Visualization.

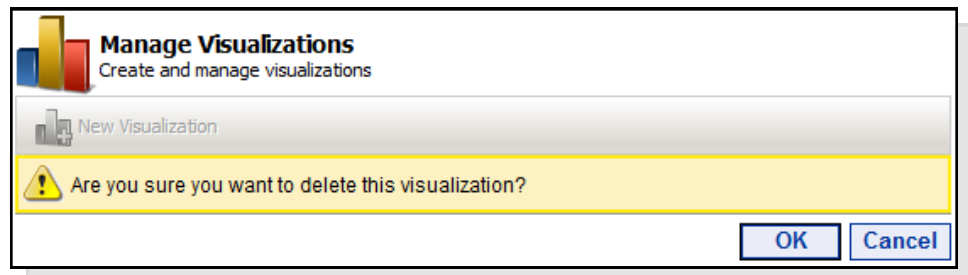
1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Visualizations**;
4. Place your mouse pointer over the desired Chart;
5. Click the drop down arrow;
6. Click  **Edit**;
7. Edit **Name**;
8. Edit **Description**;
9. Choose to **Include Description** on a portal page;
10. Choose **Series**;
11. Choose **Color**;
12. Choose **Style**;
13. Click  **Refresh Preview**;
14. Click  **Manage Editors**;
15. Choose **Visualization Admins**;
16. Click **Finish**



## C. Deleting a Chart Visualization

A Chart Visualization can be deleted by a user with the Visualization Admin permission at any time. Deleting the Visualization removes the connection to the Visualization Island on a portal page. If there is a Visualization Island displaying the deleted Chart Visualization the island will display "No visualization selected" but keep the island on the portal page.






1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Visualizations**;
4. Place your mouse pointer over the desired Visualization;
5. Click the drop down arrow;
6. Click  **Delete**;
7. Click **OK**

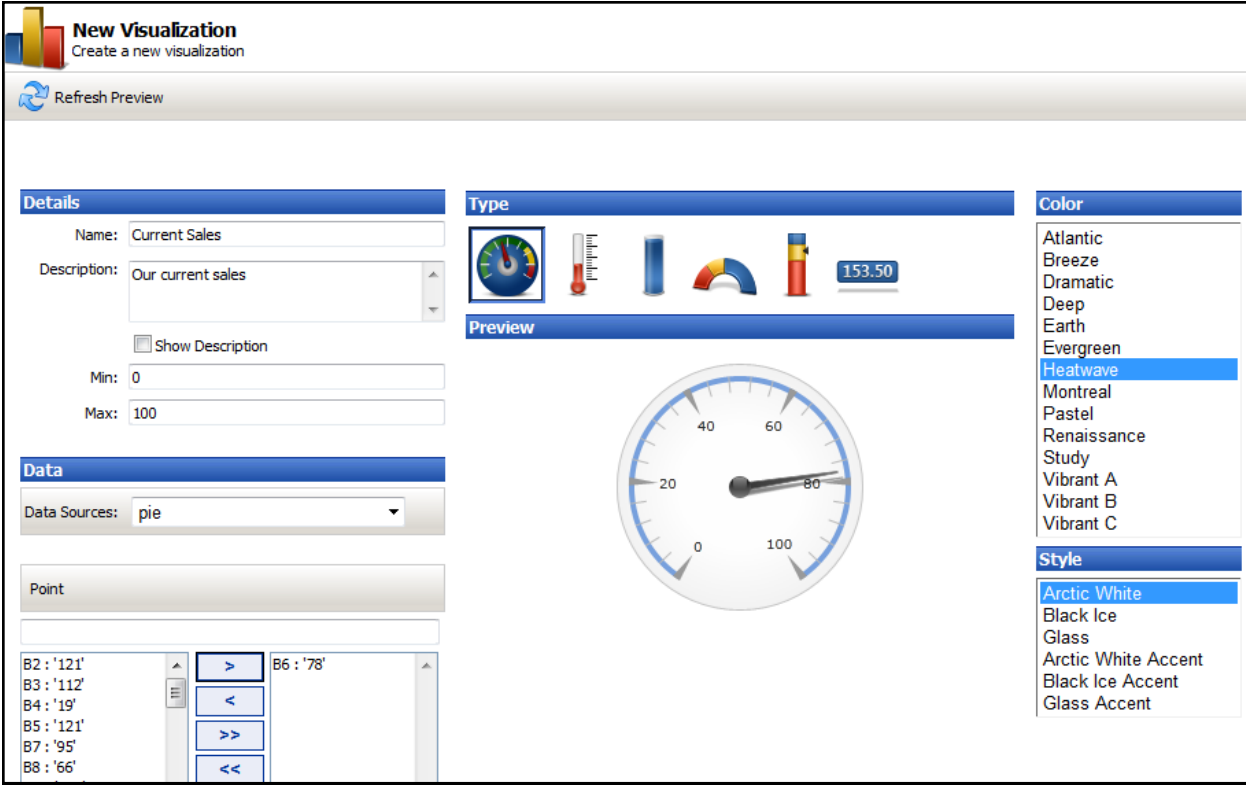


A Visualization Admin can edit and delete a Visualization. You cannot remove yourself as a Visualization Admin. This is to prevent there being no one as the Visualization Admin and losing access to the Visualization.

## D. Creating a Gauge Visualization

The Gauge Visualization is used to display a single data point of data along a range that you can define.

1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Visualizations**;
4. Click  **New Visualization**;
5. Click  **Gauge**;
6. **Select Data Source**;
7. Choose a gauge **Type**;
8. Click **Next**;
9. Type a **Name**;
10. Type a **Description**;
11. Choose to **Include Description** on a portal page;
12. Type **Min** for data range displayed;
13. Type **Max** for data range displayed;
14. Choose a single data **Point**;
15. Choose **Color**;
16. Choose **Style**;
17. Click **Next**;
18. Choose **Visualization Admins**;
19. Click **Finish**









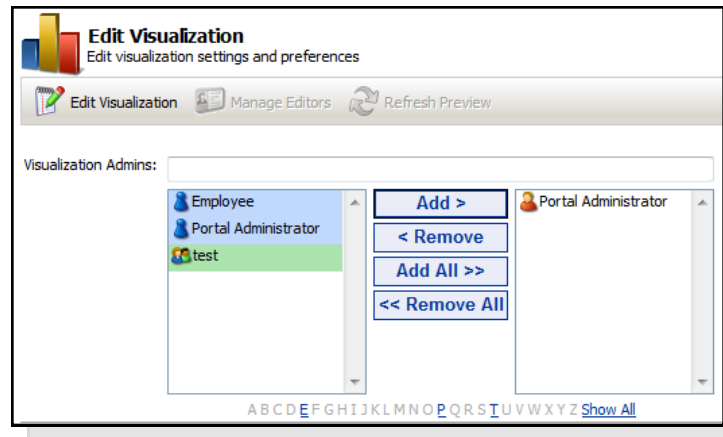
The screenshot shows the 'New Visualization' configuration page. The title is 'New Visualization' with the subtitle 'Create a new visualization'. There is a 'Refresh Preview' button. The interface is divided into several sections:

- Details:** Name: 'Current Sales', Description: 'Our current sales', 'Show Description' checkbox, Min: '0', Max: '100'.
- Type:** A row of icons representing different visualization types. The 'Gauge' icon is selected. A 'Preview' section shows a gauge with a needle pointing to approximately 80 and a value of '153.50'.
- Data:** Data Sources: 'pie'.
- Point:** A list of data points with navigation buttons. The selected point is 'B6 : '78''.
- Color:** A list of color themes including Atlantic, Breeze, Dramatic, Deep, Earth, Evergreen, Heatwave (selected), Montreal, Pastel, Renaissance, Study, Vibrant A, Vibrant B, and Vibrant C.
- Style:** A list of styles including Arctic White (selected), Black Ice, Glass, Arctic White Accent, Black Ice Accent, and Glass Accent.

## E. Editing a Gauge Visualization





The Gauge Visualization can be edited at any time by the Visualization Admins. Editing a Visualization will automatically update a Visualization Island on a portal page that is displaying that Visualization.

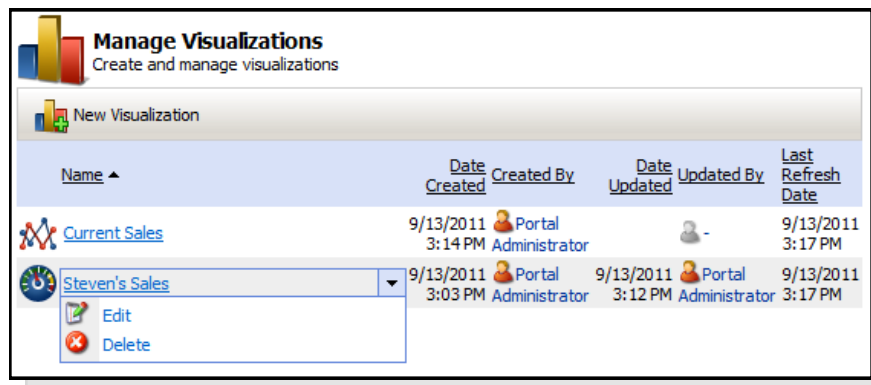
1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Visualizations**;
4. Place your mouse pointer over the desired Gauge;
5. Click the drop down arrow;
6. Click  **Edit**;
7. Edit **Name**;
8. Edit **Description**;
9. Choose to **Include Description** on a portal page;
10. Choose a data **Point**;
11. Choose **Color**;
12. Choose **Style**;
13. Click  **Refresh Preview**;
14. Click  **Manage Editors**;
15. Choose **Visualization Admins**;
16. Click **Finish**



## F. Deleting a Gauge Visualization

A Gauge Visualization can be deleted by a user with the Visualization Admin permission at any time. Deleting the Visualization removes the connection to the Visualization Island on a portal page. If there is a Visualization Island displaying the deleted Gauge Visualization the island will display “No visualization selected” but keep the island on the portal page.

1. Click  **Module Tool**;
2. Click  **Dashboards**;
3. Click  **Manage Visualizations**;
4. Place your mouse pointer over the desired Visualization;
5. Click the drop down arrow;
6. Click  **Delete**;
7. Click **OK**









## Section 5. Dashboard Islands

The Dashboards Module contains two portal Islands to allow you to place on any portal page. The My Visualization Island allows users to create and edit Visualizations. The Visualization Island allows users to display Visualizations that they are the

### A. My Visualizations

The My Visualizations Island displays all of the Visualizations that you have the Visualization Admin permission. You can edit these Visualizations in two ways.


My Visualizations		Actions ▼		
Name ▲	Date Created	Created By	Date Updated Updated By	Last Refresh Date
 <a href="#">Current Sales Figures</a>	9/13/2011 4:40 PM	 portaladmin	9/13/2011 4:40 PM  Steven Beier	9/13/2011 4:41 PM
 <a href="#">Steven's Sales</a>	9/13/2011 3:03 PM	 -	9/13/2011 4:40 PM  Steven Beier	9/13/2011 4:41 PM

#### i. Editing a Visualization in the Island

1. Place your mouse pointer over the desired Visualization;
2. Click the drop down arrow;
3. Click **Edit**;
4. Make any of the desired changes;
5. Click **OK**

#### ii. Editing and Creating a Visualization using Actions

The My Visualizations Island's Action button allows you to edit any of the Visualizations that you have the Visualization Admin permission or create new Visualizations.

1. Click **Actions**;
2. Click **Manage Visualizations**;
3. Click **Edit** or **Delete** a Visualization or create a  **New Visualization** (see page 8)



#### My Visualizations Options



[Manage Visualizations](#)

Manage Visualizations you have access to



[Change this Island's title on this page](#)

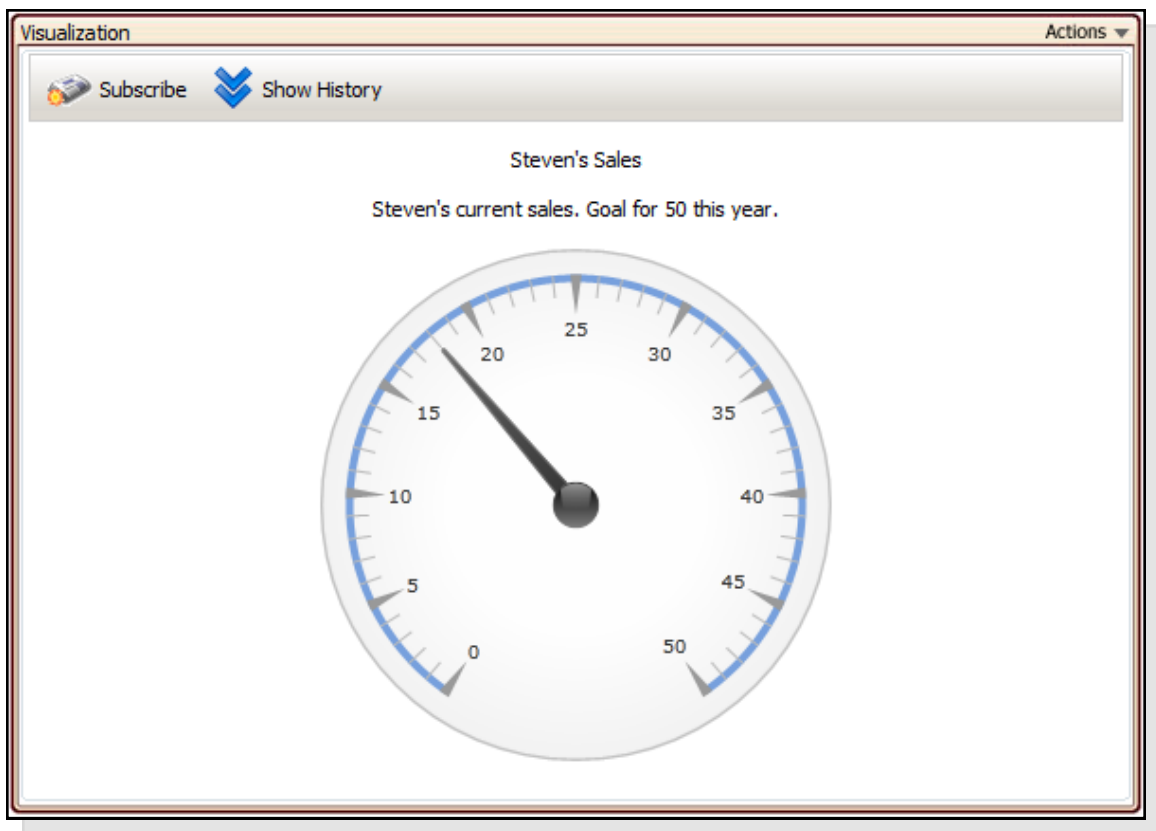
Change the title of the island on this page. This title will only affect the current page.

## B. Visualization

The Visualizations Island allows users to display a Visualization on a portal page. The user must be the Workgroup Manager or have the Assistant Manager Permission: **Select Visualization** to configure the Island.

### Configuring a Visualization

1. Click **Actions**;
2. Click Select Visualization;
3. Choose a **Size**;
4. Click **OK**;
5. Click **OK**;
6. Click [return to page](#)



Anyone can Subscribe to a Visualization and receive alerts when the data is the Visualization is updated.



## **Take Note!**

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