

Introduction (Dashboards)

Versago **Dashboards** provide a way to display information from multiple Versago sources in a single web page. Grids (standard report output) and charts can be displayed. There are also options for a “gauge” presentation and for custom HTML.

Audience

This document is intended for users that will be developing & maintaining Versago Dashboard. It is not intended as an “end user” guide. The creation and maintenance of Versago Dashboards does require knowledge of Versago Reports.

Related Documents

- [Reports Configuration](#)
- [Charts Configuration](#)

Before You Begin

Before you begin creating a Versago Dashboard, there are some things that need to be considered. Having answers to the following questions will help make the Dashboard creation process more efficient.

Determine the information that needs to be presented

The primary thing to be determined is what information needs to be presented. The content displayed in dashboards comes from Versago reports. Also decide if the information should be presented as a grid (rows & columns) or graphically as charts. Dashboard presentation is very commonly focused on graphic presentation.

The various elements displayed in a dashboard do not necessarily have to be related. The primary driver should be what information makes sense together for the end users. For example, while a Sales Manager might want to see only sales related information, a Controller might want to see bank account values, inventory value, order backlog, and open Accounts Receivable in their dashboard.

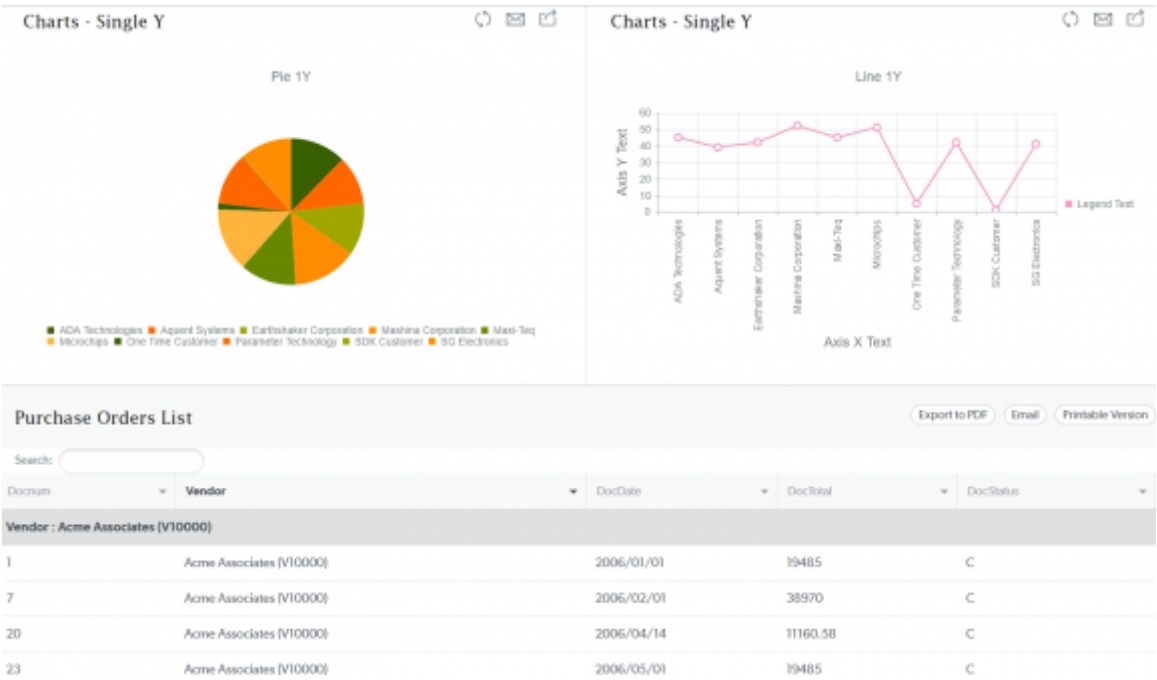
Determine the basic layout of the Dashboard

A Versago dashboard can present multiple elements of information. There can be one or two elements

in each horizontal row. A dashboard can then include multiple horizontal rows. The layout will depend on the number of elements to be displayed, and how complicated the information in the element is. For example, a column chart with ten x-axis values might need to be in a row by itself, while a simple pie chart might easily fit into a row with two display elements.

Also keep in mind that one of the purposes of a dashboard is to provide “information at a glance.” If the user must scroll down the page to find a piece of information, the dashboard may go unused. Limiting the number of vertical rows may make the dashboard easier for the end user to utilize.

The example below illustrates how a dashboard might be configured.



To Begin

- Click on the Admin link in the profile section of the Versago home page to access the Administration console.
- Dashboard configuration is found under the Dynamic Content category of the menu.

Dashboard Maintenance

- Click on the “Dashboards” link in the Admin console to begin.

The screenshot shows the 'Dashboards' tab in the Admin console. It includes a '+ Add New Dashboard' button and a table for managing existing dashboards. The table has columns for 'Dashboard ID' and 'Dashboard Name'.

Dashboard ID	Dashboard Name
1	Demo Dashboard 2

The Dashboard maintenance function consists of three elements, each on a separate tab.

- A listing of existing dashboards. This view is displayed when the function is opened.

- Click the [**Add New Dashboard**] button to create a new report.
- Click the link in the Dashboard Name column to edit an existing report.
- Click the red **X** on a row to remove the dashboard.
- The remaining elements (tabs) can be accessed in sequence to create a new dashboard, or directly when maintaining an existing dashboard. The use of each element is described in the following sections.

Creating New Dashboard

Assign Roles

As with all other Versago functions, Roles control access to dashboards. When creating a new dashboard, the Roles selection is the first step of adding a new dashboard.

The screenshot shows the 'Roles' tab in the 'Dashboard Editor'. It features a table with two columns: 'Select' and 'Role Name'. The 'Select' column contains checkboxes, and the 'Role Name' column lists 'Administrator' and 'Demo'. Both roles are selected with checkboxes. Above the table, there is a text prompt: 'Drag a column header and drop it here to group by that column'.

Select	Role Name
☒	Administrator
☒	Demo

- At least one role must be selected for the dashboard to be saved.
- Roles can be changed at any time.
- Click the "Dashboard Editor" tab to continue.

Assign Name and Initial Frame

A basic dashboard must have a name and at least one frame to be added. The following steps will allow you to add a basic dashboard for additional configuration.

The screenshot shows the 'Dashboard Editor' with the 'Name' field set to 'Demo Dashboard'. There is an 'Add New Frame' button and 'Save', 'Finish', and 'Cancel' buttons at the bottom.

Dashboard Editor	
Name: Demo Dashboard	Add New Frame
Save Finish Cancel	

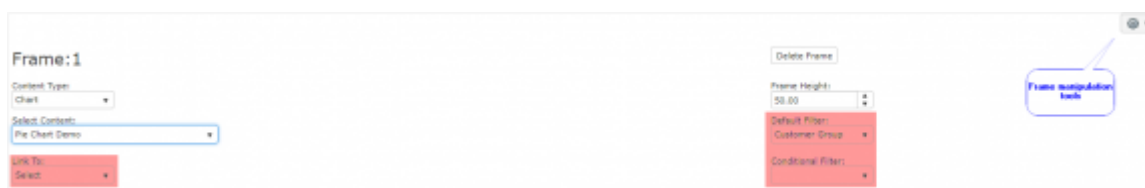
- Enter a **Name** for the dashboard.
 - This name is displayed in the menu structure and can be changed at any time.
- Click [**Add New Frame**].
 - Information about managing frames is found in the next section of this document.
- [**Save**] and [**Finish**] can only be used after adding the first frame as described below. [**Cancel**] can be used at any time.
- Click [**Save**] to add the new dashboard and continue working.
- Click [**Finish**] to add the new dashboard and return to the dashboard listing page.
- Click [**Cancel**] to discard any changes and return to the dashboard Roles tab.

Dashboard Editor

A dashboard is made up of a series of **Frames**. A frame may span the entire page horizontally, (a “row”) or may be divided into two frames across the row. There may then be multiple “rows” displayed vertically down the page.

Frame Configuration

Each frame has its own configuration elements.

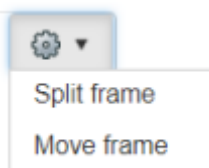


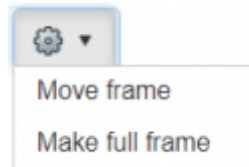
- Select an **Object Type** from the drop-down list.
 - **Grid** is the standard row/column presentation of a Versago report.
 - **Calendar** reports do not currently display the calendar layout. This will be addressed in a future update of Versago.
 - Reports should typically not use User-Applied Filters. The filters will work, however this somewhat defeats the purpose of the dashboard as a “quick view” presentation.
 - **Chart** is a chart presentation from a Versago report.



Two options, **Custom Page** and **Gauge** are displayed as being available for use. **These options should not be used at this time.** There are known deficiencies in these tools that can prevent them from working as expected.

- Select an **Object** from the “Select Object” drop-down.
 - The selection list will change depending on the Object Type selected in step 1.
 - Selecting the Custom Page object type presents an HTML editor area for creating the “page” within the frame.
- Change the **Frame Height** using the arrows in the field.
 - A larger number increases the vertical height, a lower number reduces it.
 - The size adjustment only works with the “chart” object type.
- **Frame manipulation tools** to manage the current frame.





- **Split Frame** immediately splits a full page-width frame into two half-page frames.
- **Make full frame** immediately changes a half-page frame into a full page-width frame as a new row in the vertical structure.
- **Move frame** presents a new dialog to indicate where the current frame should be moved. This is a frame-for-frame swap. For example, assume that Frame 2 is half-page and Frame 3 is full-page. If 2 is moved to 3 (or vice versa), the object in 3 becomes half-page and the object in 2 becomes full page. Click [**Submit**] to execute the move.
- Use **Delete Frame** to delete the current frame
 - If the current frame is half-page, the remaining frame will automatically become full frame.

There are three additional options on a frame labeled **Link To**, **Default Filter**, and **Conditional Filter**. The options were used in Versago versions prior to v2, but are not enabled for v2.0 and higher.

Adding Additional Frames

Once the initial dashboard has been created, additional frames can be added. Click the [**Add Frame**] button to begin. The “Create Frame” window is presented.

- Add a new Full Frame using the “**Full Frame on a new row**” option. Use the “before” and “after” options to place the new frame in the vertical row sequence.
- Add a new half-page frame using the “**Split Frame on existing row**” to convert an existing full-page frame to two half-page frames.
- Change an existing split (half-page) frame using the “**Make split Frame to full frame**” option
- Functions 2 and 3 can also be accomplished using the “Additional controls” on the desired frame as described earlier.

It is highly recommended that a new frame be added as a full frame and configured. Once the configuration is complete the frame can be moved to a split frame as needed.

Moving Frames with Drag-and-Drop

Frames can be moved around in the dashboard structure using “drag-and-drop.”

- Click and hold down the left mouse button on the frame to be moved.
- Begin to “drag” (move the cursor while holding down the left mouse button) the frame and the border of the frame will turn **red**.
- Drag the frame to its new position. The border around the target frame will turn **green** when the new frame is in position.
- “Drop” the frame by releasing the left mouse button. After a slight delay, the position of the two frames will be swapped.

From:

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Last update: **2020/06/26 14:56**

