



e-Builder Dashboards Module

August 2023

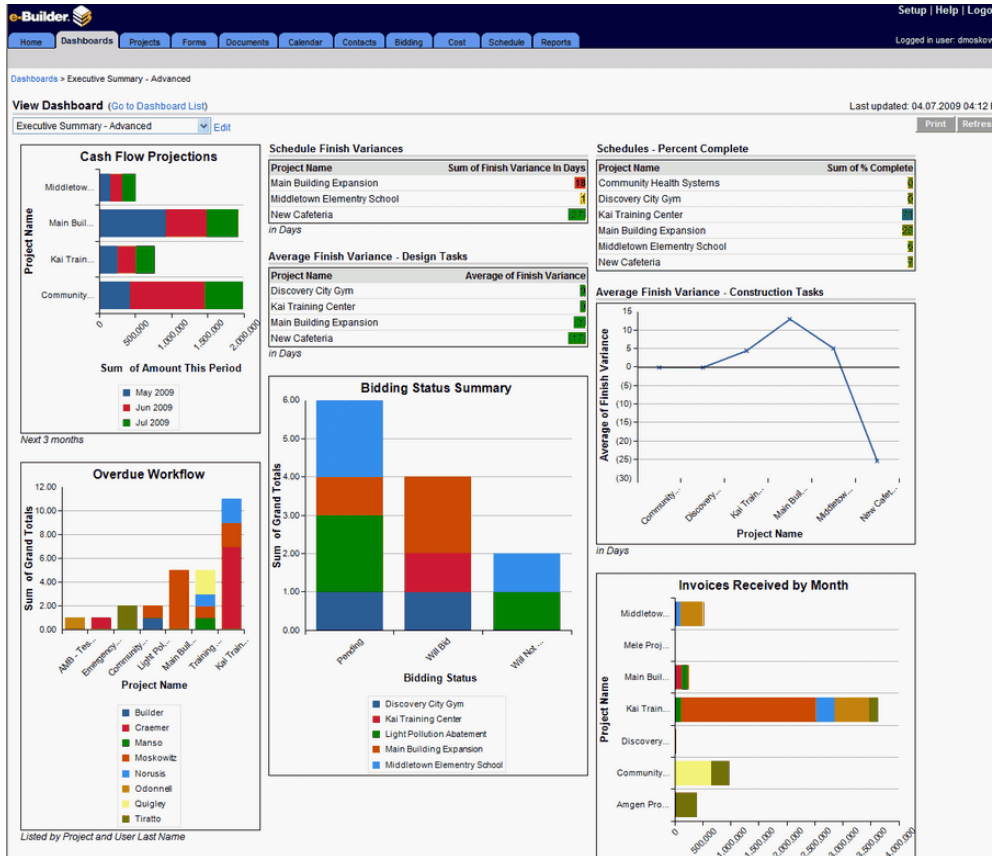
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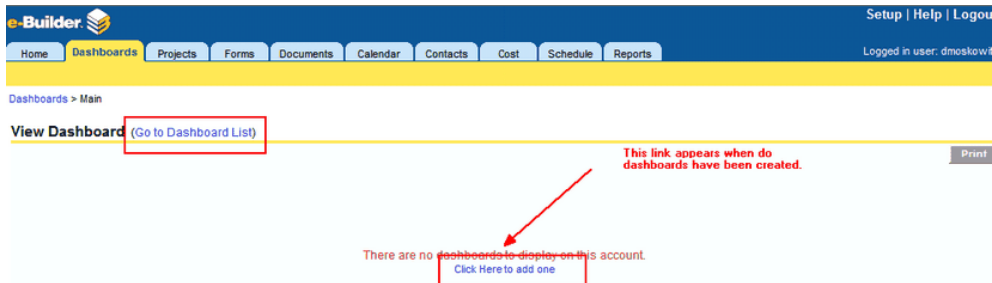
Dashboards

What Are Dashboards?

Dashboards are a graphical representation of reports. They present summary data from reports in a visual format. They are typically used to provide overviews of program or project statuses and metrics.



If no dashboards have been created on the account to which you have access, when you enter the dashboards module you will see the message there are no dashboards to display on this account. To create a dashboard, click the link in the middle of the page and follow the steps below (starting with step 2).



Creating a Dashboard

To create a dashboard, follow these steps

1. From the Dashboards tab, click the **Go To Dashboard List** link. A list of Dashboard Folders will be displayed.
2. Click **Add Dashboard**.
The Add Dashboard page will be displayed.
3. Enter the following information:
 - **Title:** Enter a name for your dashboard.
 - **Description:** Enter a description of the dashboard.
 - **Dashboard Layout Style:** Select the Layout style that will determine the number of columns shown on the Dashboard.
 - Two Columns
 - Three Columns

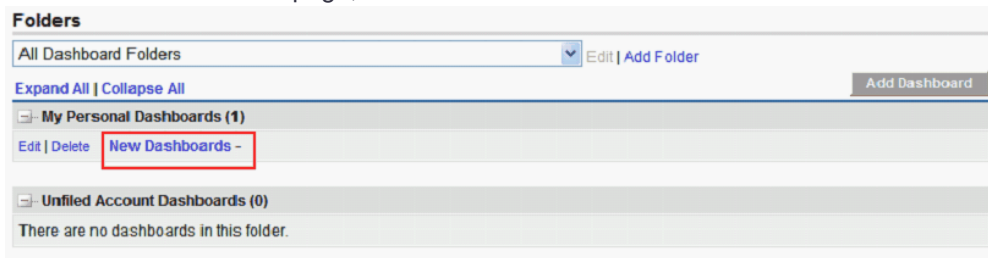
Note: This can be changed later if the dashboard needs to be expanded or reduced.
4. For each of the columns select the size:
 - Narrow
 - Medium
 - Wide
 - Custom: This setting requires that you select the number of pixels (between 200-800)

Note: If the dashboards will be printed, or if most of your users are using large monitor resolutions (e.g. 1024 x 768, 800 x 600), having more than one wide column will require users to scroll and or use more than one page to print the dashboards.
5. In the **Running User** field, use the Lookup button to select a user. The data that is shown on the dashboard is determined by this user. If you want the dashboard to show all the information stored in e-Builder, it is best to select an e-Builder Administrator.
6. From the **Folder** drop-down, select the folder to which you want to store the dashboard.
7. In the **Dashboard Permissions** section, select who has the permission to view these dashboards:
 - This dashboard is available only to me
 - This dashboard is available to all users
 - This dashboard is available to the following roles.
Select the particular roles to provide dashboard access to users in those roles.
8. Click **Save**.
The dashboard has now been created.

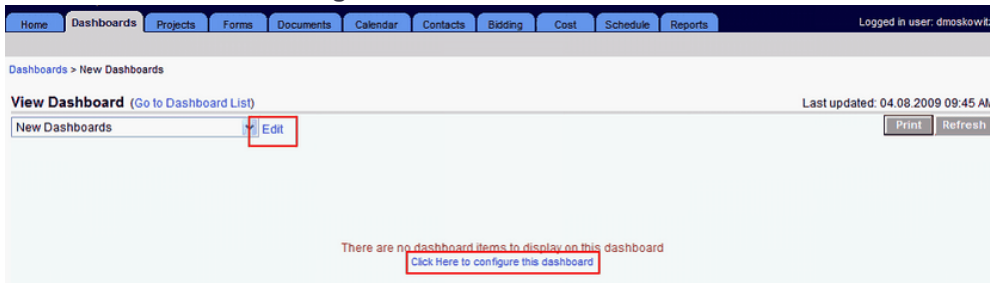
Adding Items to a Dashboard

How Do I Add Items to a Dashboard?

1. From the Dashboard List page, click the name of the dashboard.



2. Click the **Edit** link next to the name of the dashboard; or, if the dashboard does not have any items on it, click the **Click Here to configure the dashboard** link.



3. Click **Add Dashboard Item**.
4. Select a Component Type.
5. Select a Report.
6. Additional fields may be required, depending on the component type. Those fields will be indicated in red.
7. Click **Save** to create the dashboard item.

Note: The report selected must be either a Summary or Matrix report. The dashboard item will display the summary results of the left most column that is summarized.

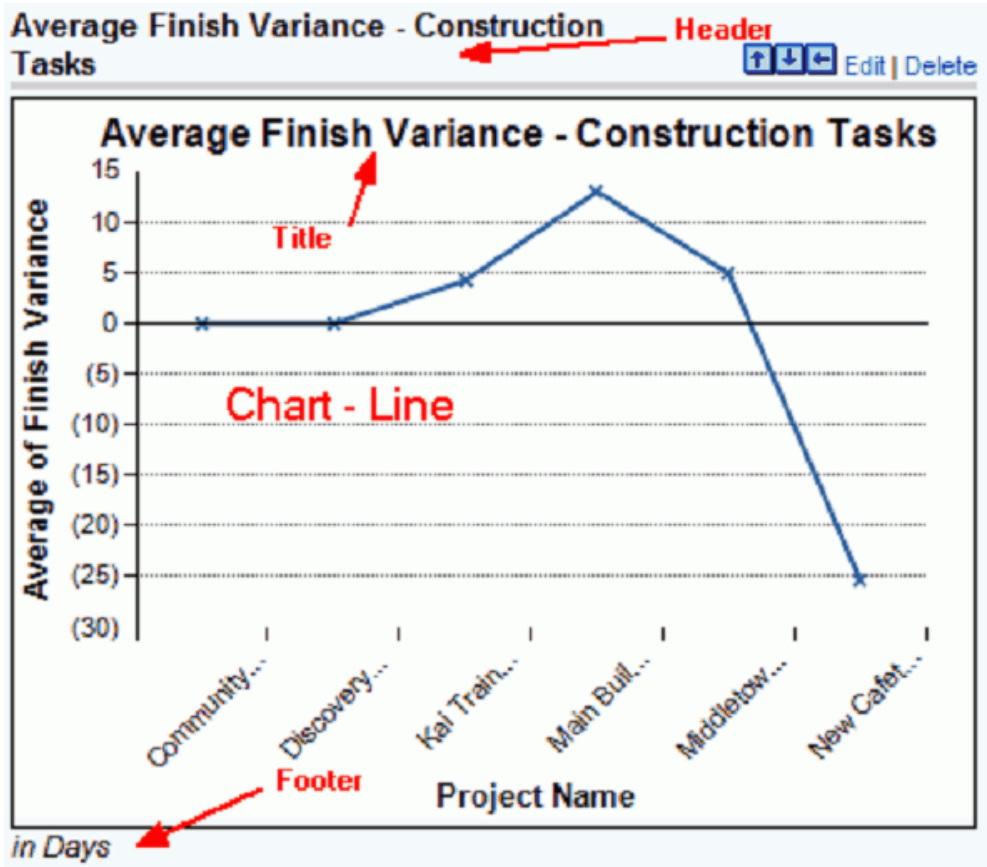
Types of Dashboard Items

The following are the types of dashboard items available:

- Chart
- Horizontal Bar
- Vertical Bar
- Line
- Pie

Chart

Chart Dashboard Items have a header, which appears above the item, a footer, which is listed at the bottom, and a title within the frame of the item.



Table

The Table Dashboard Items have a header, which appears above the item, and a footer, which is listed at the bottom. They also have the option to color code the results based on two thresholds that you specify:

- Anything lower than the first threshold will be displayed in the Low Range Color
- Anything higher than the second threshold will be displayed in the High Range Color
- Anything in between will be displayed in the Middle Range Color

Schedule Finish Variances

Project Name	Sum of Finish Variance In Days
Main Building Expansion	18
Middletown Elementary School	1
New Cafeteria	(27)

in Days

Metric

The Metric dashboard only displays the total of what is summarized on the selected report. Like the Table it has a header, footer, and color based on thresholds. It also includes a Metric Label. A metric will always be limited to a single row.

Tip

For metrics, you can add several metrics in a row and if there is no header or footer between them, they will end up displaying like a table. This lets you create your own table or grid. You would give a header to the top metric and a footer to the bottom one to make it look like just one table.

Note: Oftentimes, a metric will be placed beneath another dashboard item to display its total.

Schedule Finish Variances

Project Name	Sum of Finish Variance In Days
Main Building Expansion	18
Middletown Elementary School	1
New Cafeteria	(27)
<i>in Days</i>	
Total Variance	Metric (8)

Metric Label (with arrow pointing to 'Total Variance')

Gauge

The Gauge Dashboard only displays the Total of what is summarized on the selected report. It displays the results as a needle in between the range that you specify. You have the option to color code the results based on two thresholds that you specify:

- Anything lower than the first threshold will be displayed in the Low Range Color
- Anything higher than the second threshold be displayed in the High Range Color
- Anything in between will be displayed in the Middle Range Color

You should also specify a minimum and maximum value, which will set the range of the gauge.

Dashboard Item Settings

Dashboard: Administrative Management - Adoption

Settings

Component Type: Chart Table Metric Gauge

Header:

Footer: Last 30 Days

Title: Average User Logins

Custom Report: Dashboards - Avg User Logins

Minimum Value: 0

Maximum Value: 120

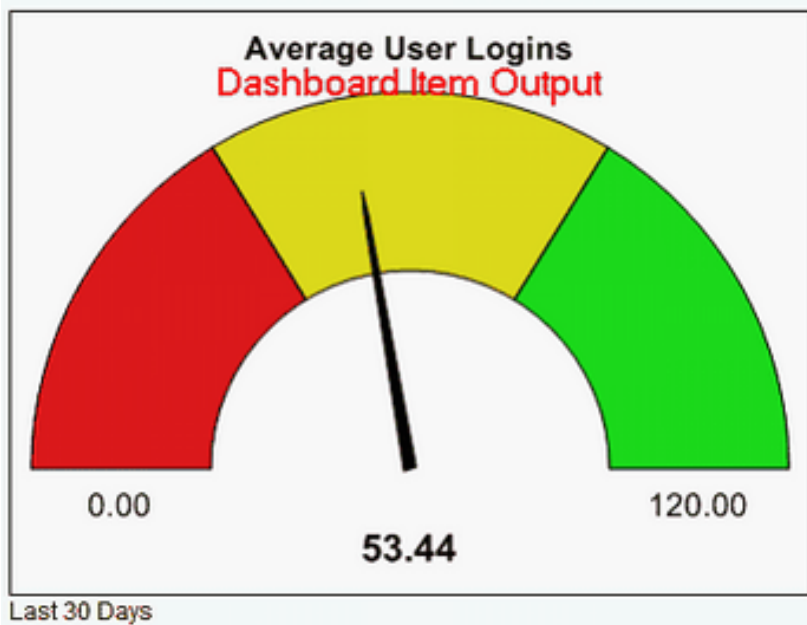
Low Range Color:

Low - Mid Cutoff Value: 39

Middle Range Color:

High Threshold Value: 81

High Range Color:



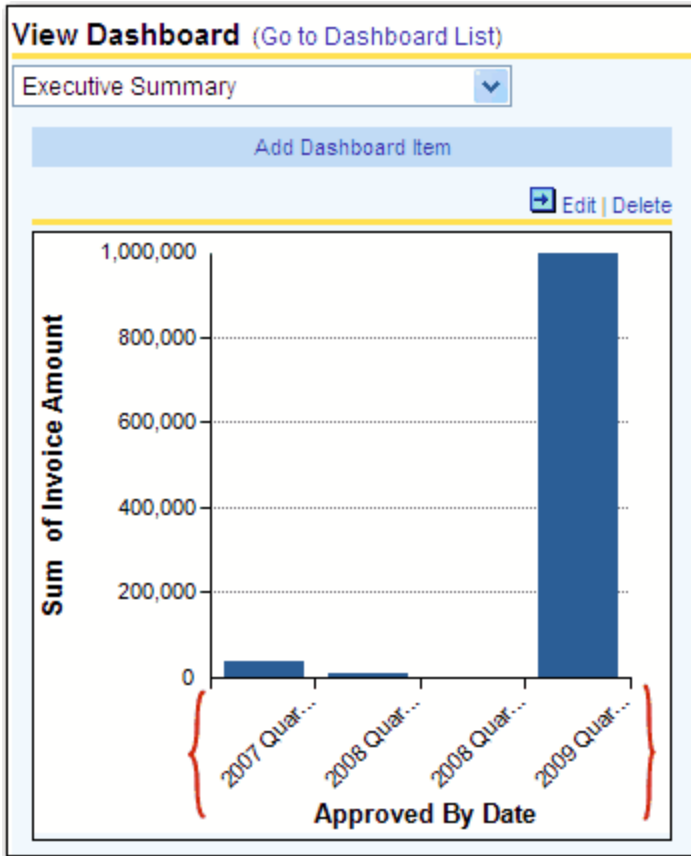
Specifying X Axis Label Lengths

e-Builder allows you to specify the length of the labels for the x-axis for charts you set up using the dashboard module which are either summaries or metrics, which are grouped by at least one category. This is helpful so that your x-axis labels are not truncated, causing confusion as to their identification.

Look at the example below. This is a vertical bar chart set up to show a summary of the actual costs for a project, grouped by quarter. In the red rectangle is the field for setting the X-axis label length:

Edit Dashboard Item	
Dashboard Item Settings	
Dashboard:	Executive Summary
Component Type:	<input checked="" type="radio"/> Chart <input type="radio"/> Table <input type="radio"/> Metric <input type="radio"/> Gauge
Header:	<input type="text"/>
Footer:	<input type="text"/>
Title:	<input type="text"/>
Custom Report:	Actual Cost (Program Summary, Grouped by Quarter) ▼
Chart Type:	Vertical Bar ▼
Sort By:	Row Label Ascending ▼
Maximum Items Displayed:	<input type="text" value="5"/>
Max X-Axis Label Length:	<input type="text" value="9"/>

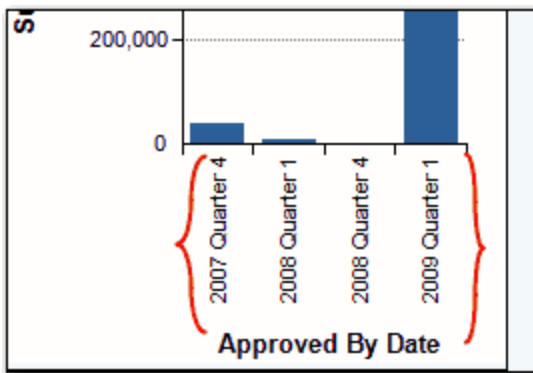
In this example, we have specified an X-axis label length of 9, which is the minimum. Notice that the labels are cut off (see items in the red parenthesis):



We can change the value of the X-axis label, so that the whole label is displayed. In this case, we enter 40 (the maximum value is 999):

Chart Type:	Vertical Bar
Sort By:	Row Label Ascending
Maximum Items Displayed:	5
Max X-Axis Label Length:	040

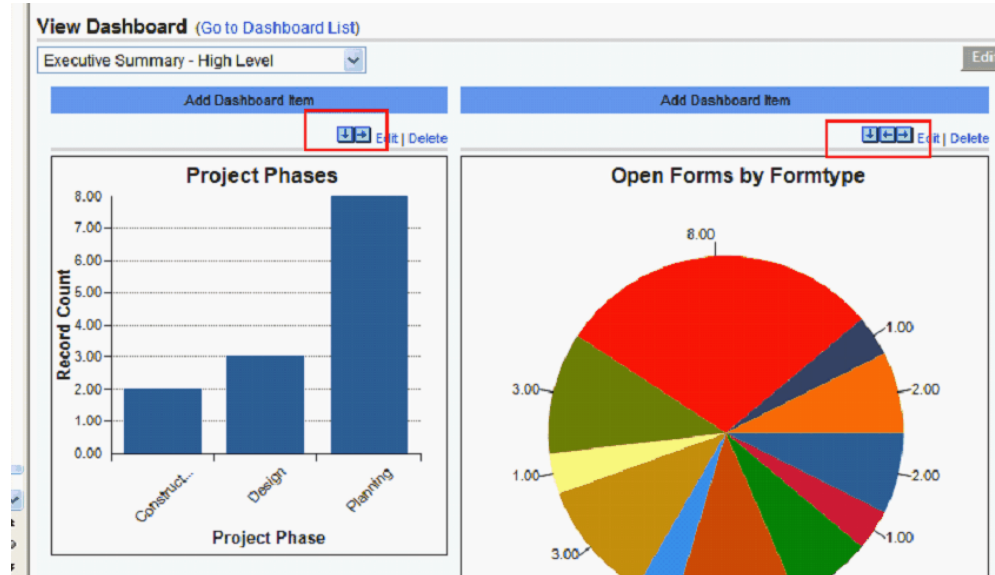
Here is the resulting chart (labels in the red parentheses are displayed, no longer truncated):



Editing a Dashboard Layout

How Do I Edit a Dashboard Layout?

Once dashboard items have been added they can be reorganized by clicking on the blue arrows above them.



To edit an existing Dashboard

1. From the Dashboards Tab, click the **Go To Dashboard List** link.
2. Click the **Edit** link.
3. Reorganize dashboard items by clicking on the blue arrows above them. Modify the settings as needed.
4. Click **Save**.

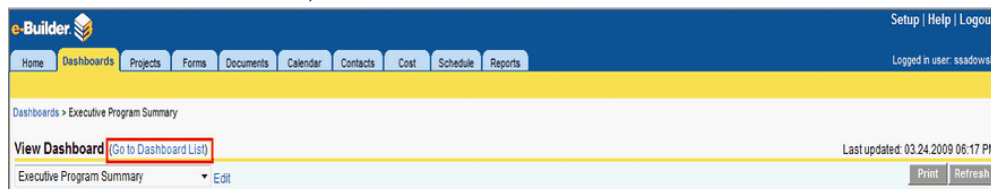
Working with Dashboard Folders

How Do I Organize My Dashboard Folders?

Just as you can with Report folders, you can store your Dashboards in different folders. This helps you organize your information.

To create a dashboard folder

1. From the Dashboards Tab, click the **Go to Dashboard List** link.



2. Click the **Add Folder** link.

3. Enter the name of the Folder in the Folder Name field.
4. Click **Save**.

Printing a Dashboard

To print a dashboard

- Click the **Print** button in the top right corner of the page.

Note: You may need to change your print settings to Landscape to capture the entire Dashboard.



Updating a Dashboard

How Do I Update the Results of a Dashboard?

In the top right hand corner of the dashboard the time and date of when the results were last calculated is displayed; however, note that the time displayed is not always up to the second.

To update the results, simply click the **Refresh** button. The dashboard's results will be updated.

