

Navigation:
Dashboard Definition
Wizard

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About This Guide

This guide is designed as a training tool for **ARCHIBUS V.19.1**. The guide may or may not be compatible with earlier or later versions of ARCHIBUS.

The following represents the estimated time a user will spend reading the document and completing the included exercises.

Training Topics:	Minutes:
Overview	:15
Exercise 8231: Create a Dashboard	:15
Exercise 8232: Drag-and-Drop Dashboard Views	:10
Estimated Time to Complete	<hr/> 0:40

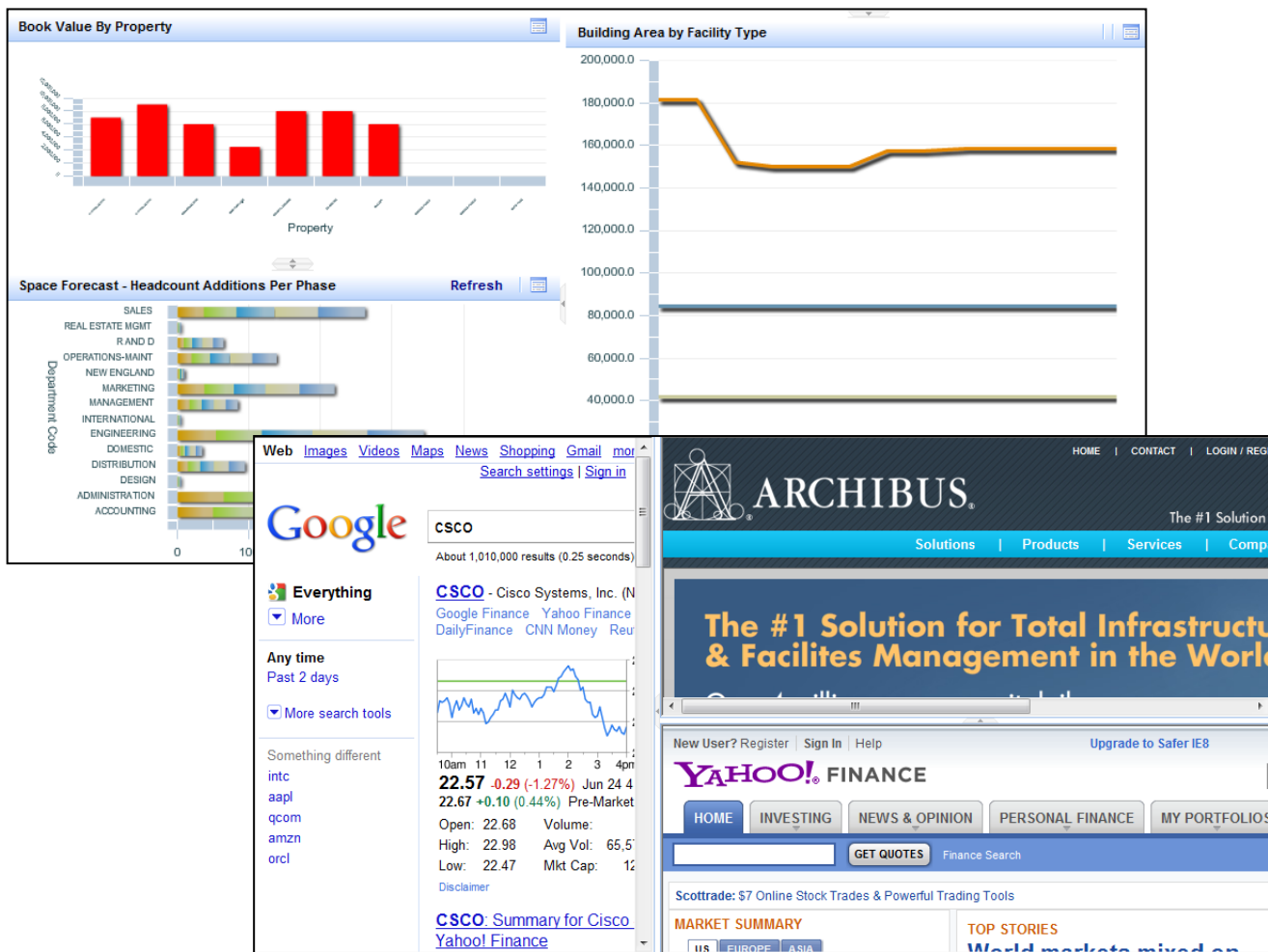
Overview: Dashboard Definition Wizard

Infrastructure expense often represents an organization’s second largest expense after personnel. Because of this, the information captured in an IWMS system can be beneficial to decision-makers at an organization because of the detail it provides concerning building and property assets. Top-level managers and executives need to accurately see how these assets affect their bottom line in order to reduce infrastructure costs. While information like capital expenses by country or region is invaluable to an executive, the price of a one-time fix to an air handler unit is not. Therefore, being able to summarize or “roll-up” detailed asset-related expenses to high-level reports and present them on one page is a key factor in helping executives make quick and informed decisions. Executives often have minutes, not months, for making key business decisions, so being able to quickly identify asset-related expenses and liabilities could mean the difference in millions, even 100s of millions, of dollars.

ARCHIBUS Web Central provides you with tools for setting up dashboard processes that contain multiple views, allowing a single user access to multiple summary reports on a single Web page. Before creating dashboard processes, users run the View Definition Wizard to fine tune views intended for display on a dashboard.

Dashboard activities are activities that have Web Dashboard processes assigned to them. ARCHIBUS includes predefined dashboard activities, such as AbDashboardExecutive, and AbDashboardStaff. These activities are placeholders for which you can define a layout and add views using the Dashboard Definition Wizard.

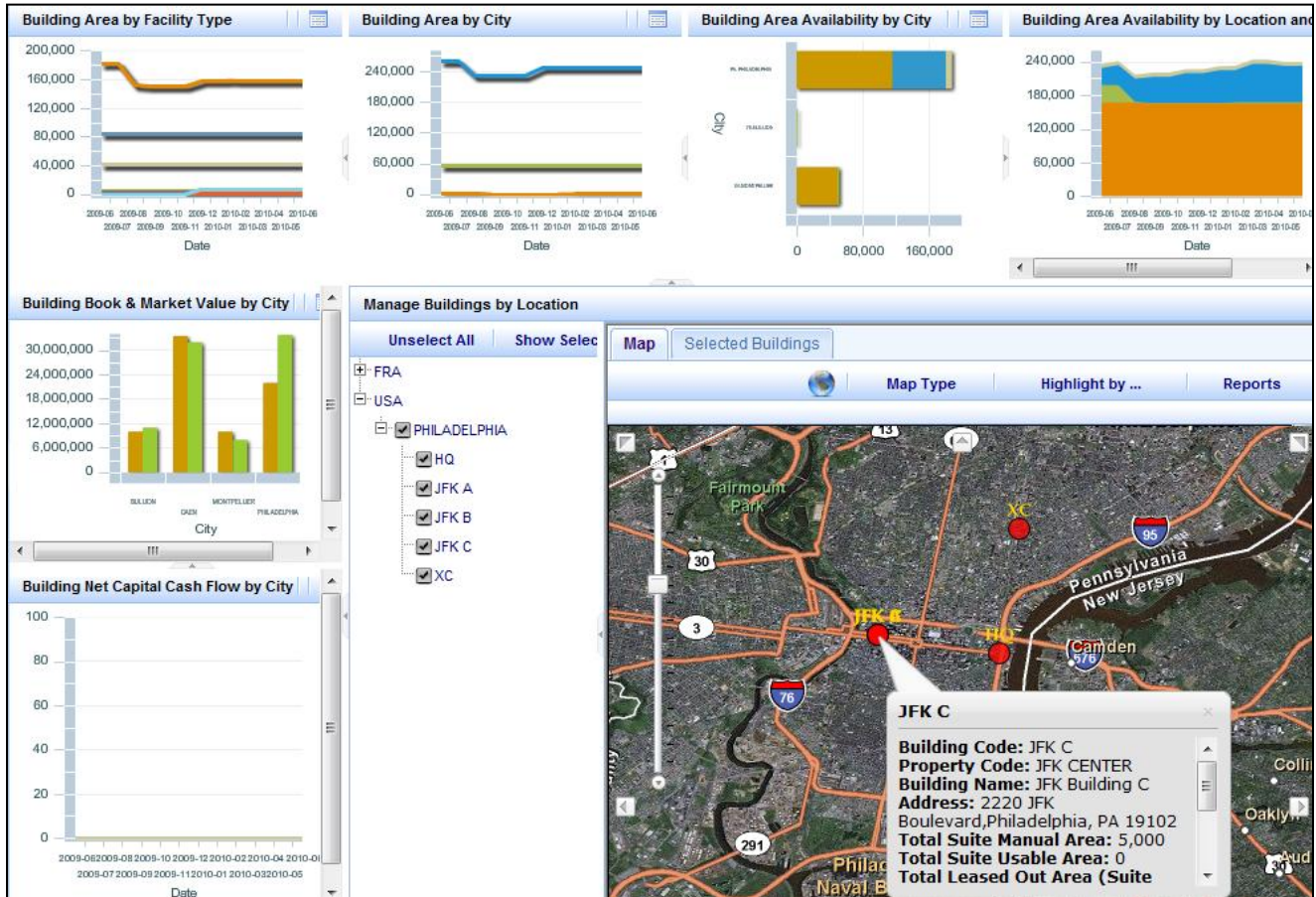
Certain application activities, such as the Building Operations' Service Desk activity and the Real Property Portfolio Management's Portfolio Administration activity have predefined dashboards that come with default views.



In This Document

The goal of this document is to give administrators the skills needed to assign existing views to dashboard processes using the Dashboard Definition Wizard. By the end of the document, administrators should be able to do the following:

- Assign view analysis and other summary views to Dashboards
- Replace individual dashboard views by dragging and dropping views from the Process Navigator



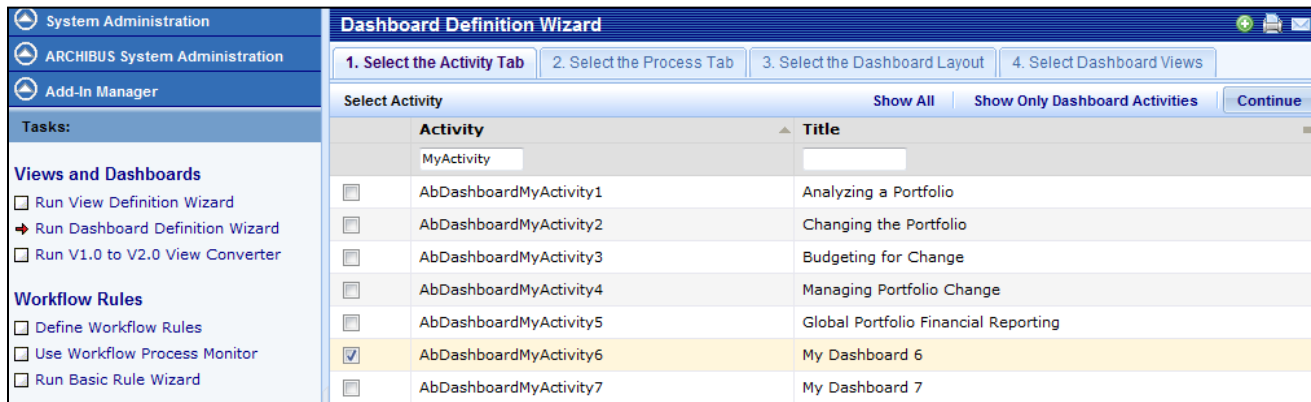
Basic Skills: Dashboard Definition Wizard

ARCHIBUS offers a wide variety of reports and charts, but users typically need a limited number that are vital to their daily work. A dashboard enables quick access to data by presenting multiple views on one screen. You can use the Dashboard Definition Wizard to create Web dashboards targeted to users performing specific roles in your organization. After creating the dashboard you assign it to the users whose role requires the views included in the dashboard.

Skill 1: Selecting an Activity

The Dashboard Definition Wizard Select Activity panel shows activities that are active (activities for which the Active? field is set to Yes), have been assigned “Web” processes, and have been licensed. To see only Dashboard Activities, click Show Only Dashboard Activities.

1. Check off the activity to which you would like to assign a dashboard process and press “Continue.” The activity you choose becomes one of the top-row tabs in a dashboard view. The dashboard processes themselves show up as second-row tabs in dashboard views.



Skill 2: Selecting a Process

The dashboard processes are the second-row tabs for the dashboard. These tabs organize the dashboard views by process or role. Step 2 shows the processes associated with the activity selected in Step 1. You can only select processes that have a type of Web Dashboard. You can create a Web Dashboard process if one does not exist for the activity.

The screenshot shows the 'Dashboard Definition Wizard' window. The top navigation bar indicates the current step is '2. Select the Process Tab'. The main content area is divided into two sections: 'Select the process tab' and 'Add a New Process Tab'.

Select the process tab

Process or Role	Process Type	Activity	Display Order	License Level			
<input type="checkbox"/> Dashboard61	Web Dashboard	AbDashboardMyActivity6	100	N/A	<input type="button" value="Up"/>	<input type="button" value="Down"/>	<input type="button" value="Delete"/>
<input type="checkbox"/> GlobalAssets	Web Dashboard	AbDashboardMyActivity6	100	1 - Self-Service	<input type="button" value="Up"/>	<input type="button" value="Down"/>	<input type="button" value="Delete"/>
<input type="checkbox"/> Placeholder	Web Dashboard	AbDashboardMyActivity6	100	N/A	<input type="button" value="Up"/>	<input type="button" value="Down"/>	<input type="button" value="Delete"/>

Add a New Process Tab

Activity: * AbDashboardMyActivity6 ...

Process or Role: * Capital Asset Summary

Display Order: 200

Process Type: Web Dashboard

License Level: 3 - Analysis

Buttons: Save, Cancel

To create a new Web Dashboard process for the activity:

1. Select the "Add a New Process Tab."
2. Type a name for the tab in the Process or Role field. This is the text that appears on the tab.
3. Enter a display order. The display order must be unique for the activity. Lower numbers appear to the left of higher numbers.
4. Click Save.
5. The process now appears in the top panel.
6. Select the process and click Select and Continue.

From the top panel you can:

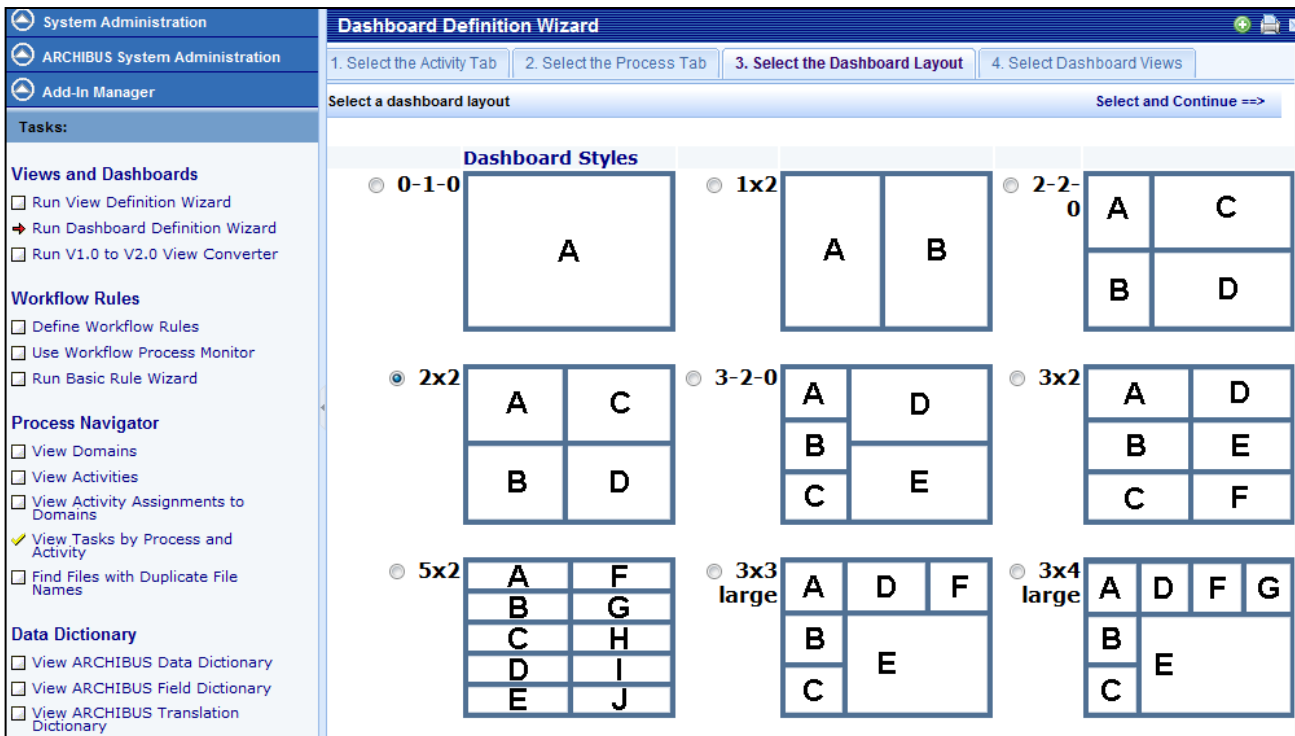
- Change the display order for the process using the Up and Down buttons. Display order numbers automatically update when you use the buttons.
- Delete a process by clicking Delete in the row for the process. The dashboard process and its associated views are removed from the activity.

Skill 3: Selecting a Layout

In this step, you choose the pattern of panels that will hold your dashboard. In the next step, you will choose a view to go into each panel. The panels of each dashboard are labeled A, B, C, etc. You can choose any style of layout and use it as a dashboard. Typically, you will use a dashboard style layout that is designed to show a number of views side-by-side in report-style proportions. However, all of the standard layouts are provided in the wizard for completeness' sake. For example, you can also use a Form style layout -- which has taller panes designed to hold data that scrolls vertically. Or, you can use a Console style layout that has a horizontal pane at the top to hold a restriction console.

Generally, dashboards are organized into one, two, or three columns, each with a number of rows. A 3-2-3 pattern has three columns with three rows in the first column, two in the second, and three in the third. A 3-2-0 pattern has no third column. A 2x1 pattern has one column split evenly between two rows. Some dashboards have their center column split to get four columns. These dashboards actually have a nested layout in this center column.

The layout defines the panels into which the selected views of the Dashboard will fit. Select a layout that has the correct number of panels for the views you want the dashboard to include. Select the option button for the layout, and click Select and Continue.



Skill 4: Selecting Views

You now select the views to include in the dashboard. The lower panel, Add Available Dashboard Views, includes all of the ARCHIBUS Process Tasks (afm_ptask) table records. The upper panel, Organize and Save Dashboard Views, shows the views (or tasks) associated with the selected process. As you add views from the lower panel they appear in this upper panel.

Order	View title	View name	Up	Down	Delete
A	Bar Chart	ab-chart-bar.axvw	Up	Down	Delete
B	Column Chart	ab-chart-column.axvw	Up	Down	Delete
C	Line Chart	ab-chart-line.axvw	Up	Down	Delete
D	Pie Chart	ab-chart-pie.axvw	Up	Down	Delete

Activity	Process or Role	Task
Add AbAssetManagement	Background Data	View and Edit Cable Standards
Add AbAssetManagement	Background Data	View and Edit Cable Types
Add AbAssetManagement	Background Data	View and Edit Equipment Standards
Add AbAssetManagement	Background Data	View and Edit Faceplate Standards
Add AbAssetManagement	Background Data	View and Edit Furniture Standards
Add AbAssetManagement	Background Data	View and Edit Jack Standards
Add AbAssetManagement	Background Data	View and Edit Patch Panels Standards

To add views:

- From the lower Add Available Dashboard Views panel, select the views for the dashboard process. Use the mini-console to search for the views you want to add. You can search by activity, process or role, task, or task file.
- Click Add in the row for the view to add it to the dashboard. Select a view for each panel in the layout you selected in the previous step.
- If needed:
 - Use the Up and Down arrows to place the views in specific panels.
 - Click Delete to remove a view from the dashboard process.
- To preview the dashboard in a pop-up window, click Preview Dashboard.
- To save the dashboard, click Save the Selected Views and Dashboard Layout. A message gives the path and file name for the dashboard you defined. Dashboard view files are saved in the \schema\per-site folder. You assign this process view file to users so that they can access this dashboard. When you click Save, the Dashboard Definition Wizard:
 - Deletes any existing ARCHIBUS Process Tasks for this Dashboard activity and process, and replaces them with the tasks you select using the wizard.
 - Saves a new view file in the per-site folder. For example, if you create a dashboard for the Projects process for the Dashboard Department activity, a file called \schema\per-site\AbDashboardDepartment\Projects\ab-dashboarddepartment-projects-dashboard.axvw is created.
 - Saves the name of this view in the afm_processes.dashboard_view field.
 - Saves the layout you selected to the afm_processes.dashboard_layout field.

Skill 5: Dragging & Dropping Dashboards Views

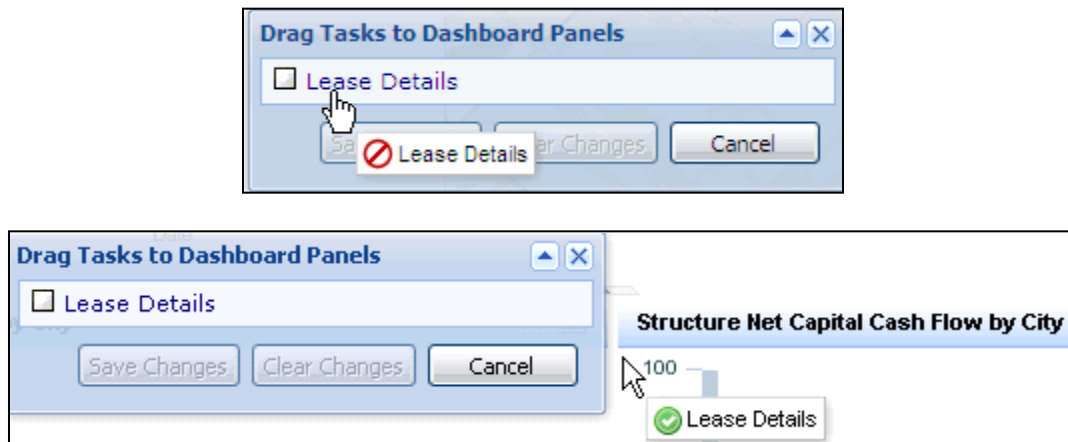
Users can customize their dashboards and drag and drop their favorite views onto the dashboard.

For dragging and dropping views onto the dashboard, you will get the best results with views that you have defined using the View Definition Wizard and placed on the Process Navigator. These views follow all of the conventions required for dashboard views. Views that are created by hand may not follow these conventions. For instance, hand-created views may not have unique IDs for all panels in a view -- these unique IDs are a requirement if multiple views are combined in one dashboard layout.

When dragging and dropping views, you cannot drop view 1.0 views (from V.17.1 and earlier) onto a dashboard pane that hold a view 2.0 view (from 17.2 and later). The reason is that the Dashboard Definition Wizard creates an iFrame around any View 1.0 view. This iFrame enables View 1.0 views work inside of the newer dashboards. The Dashboard Definition Wizard doesn't create this iFrame around View 2.0 views because it is not necessary and because it makes the views load more slowly.

You can right-click views in the Process Navigator, then drag and drop the view onto your dashboard to add this view to your dashboard layout. To access this feature:

1. Choose Show Dashboard and load a dashboard view.
2. Click the triangle icon at the left of the Web Central screen to display the Process Navigator.
3. Highlight the task in the Process Navigator and right click to display the context menu.
4. Invoke the command labeled Add This Task to Dashboard. The task is shown in the Drag Tasks to Dashboard Panels floating window that appears over the dashboard.
5. Click and drag the view name in this floating window, and drop the name into one of the panels of the dashboard. The name initially has a cancel sign that becomes a green check mark when you position it in a panel.



6. Click Save Changes.

Procedure: Creating a Dashboard

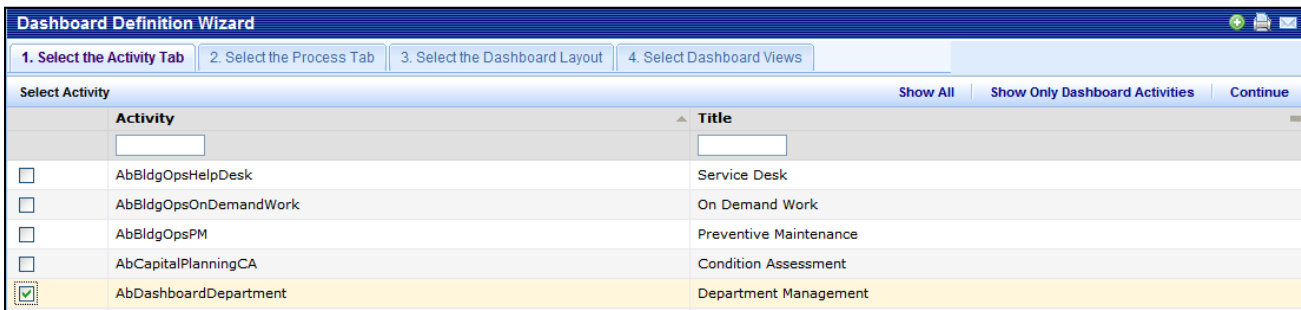
The following steps walk you through the process of creating a dashboard using the Dashboard Definition Wizard.

Step 1: Evaluating Views, Dashboards, and Users

Before creating dashboards, decide who is going to use them and for what they will be used. Dashboards are designed to hold a large amount of information that can be consumed in a short period of time. This means that dashboards have to be fairly simple views of complex data. Make sure that views chosen for dashboards require minimal or no mouse clicks, have no distracting features, and are designed specifically for a certain group of users.

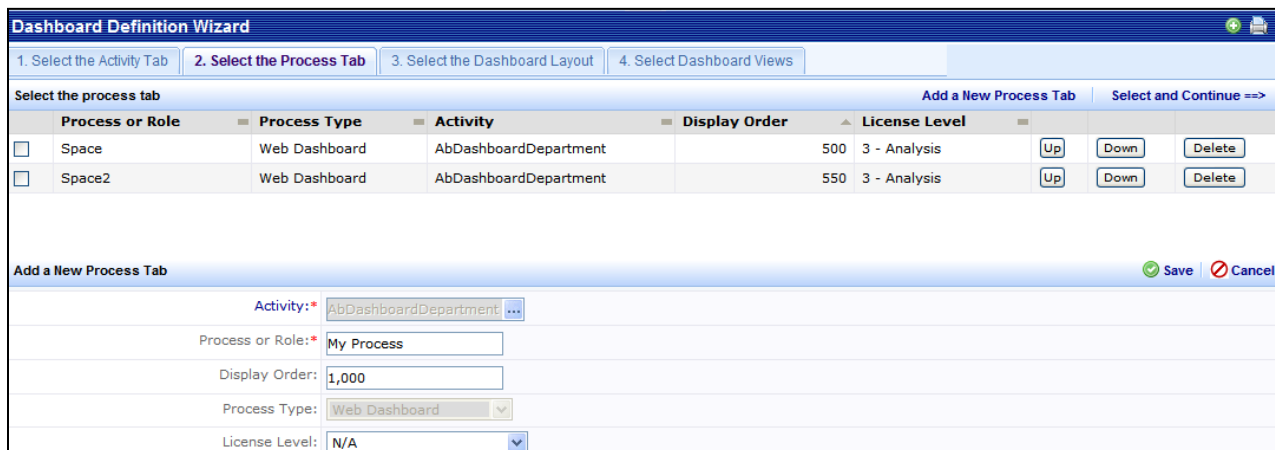
Step 2: Selecting an Activity

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called, "Run Dashboard Definition Wizard."
3. Click the "Show Only Dashboard Activities" button.
4. Select an activity and press "Continue."



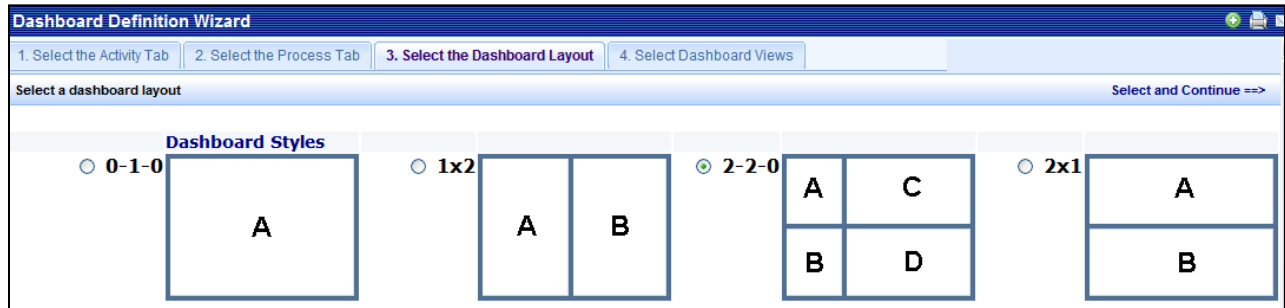
Step 3: Selecting a Process

1. Click the "Add a New Process Tab" button.
2. Enter the Process or Role name.
3. Click the "Save" button
4. Select the new process and click "Select and Continue."



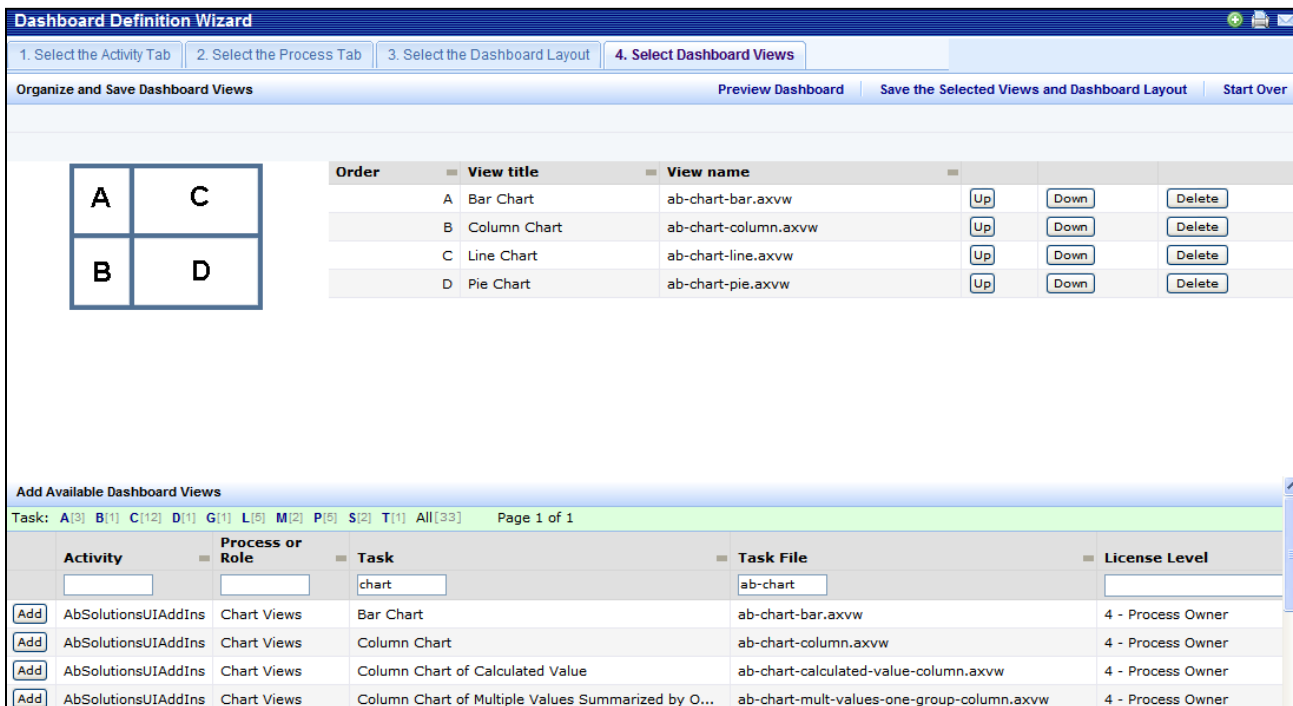
Step 4: Selecting a Layout

1. Select a dashboard layout.
2. Click "Select and Continue."



Step 5: Selecting Views

1. Click the Add button next to each view to be placed on the dashboard: one view for each panel.
2. Click "Preview Dashboard."

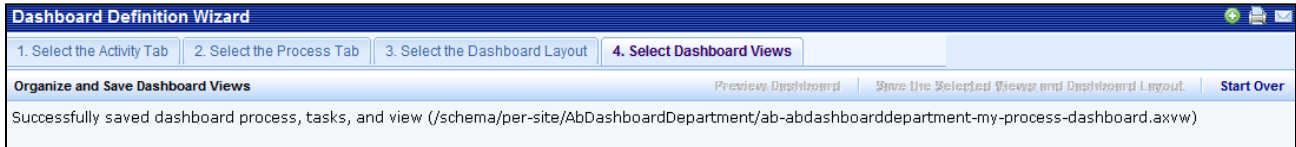


Step 6: Saving the Dashboard Process

1. If the Dashboard is acceptable, close the Preview.



2. Click "Save the Selected Views and Dashboard Layout." Record the name and location of the saved dashboard file.

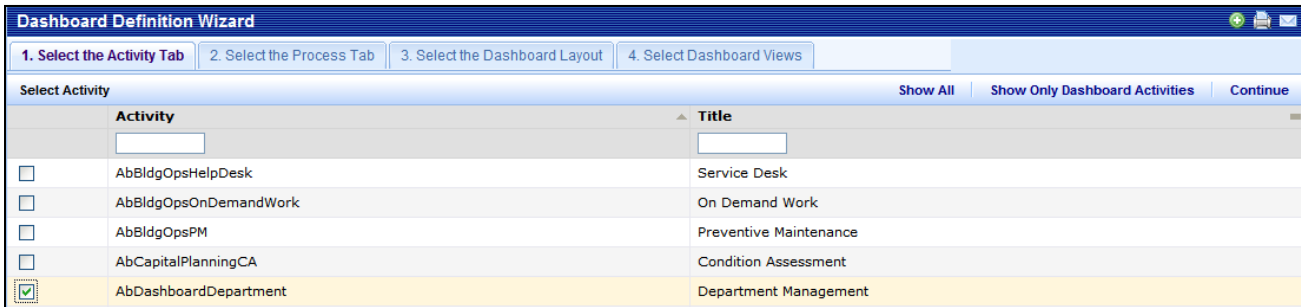


Exercise 8231: Create a Dashboard

Your space manager would like a view of how space is allocated to departments across buildings. He would like to see a stacking bar chart of rooms areas by department as well as a drill-down report that gives him details of how much of each building and floor is used by all of his departments.

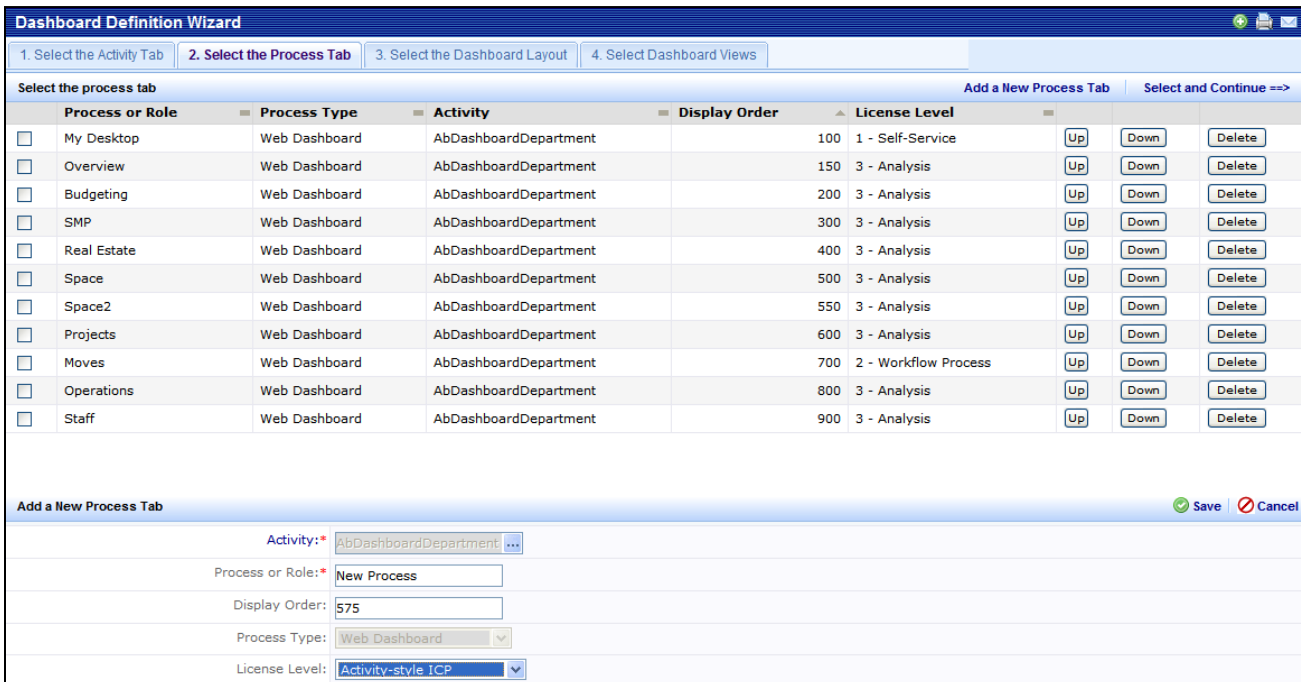
Step 1: Selecting an Activity

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4. Select an activity and press “Continue.”



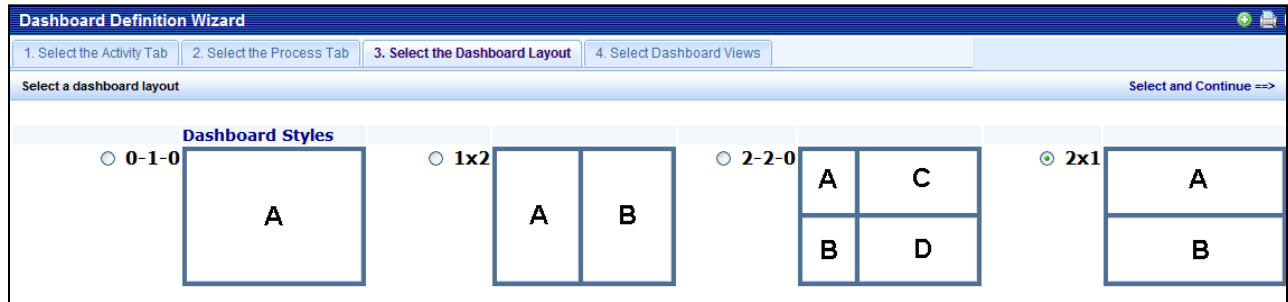
Step 2: Selecting a Process

1. Click the “Add a New Process Tab” button.
2. Enter the Process or Role name.
3. Click the “Save” button
4. Select the new process and click “Select and Continue.”



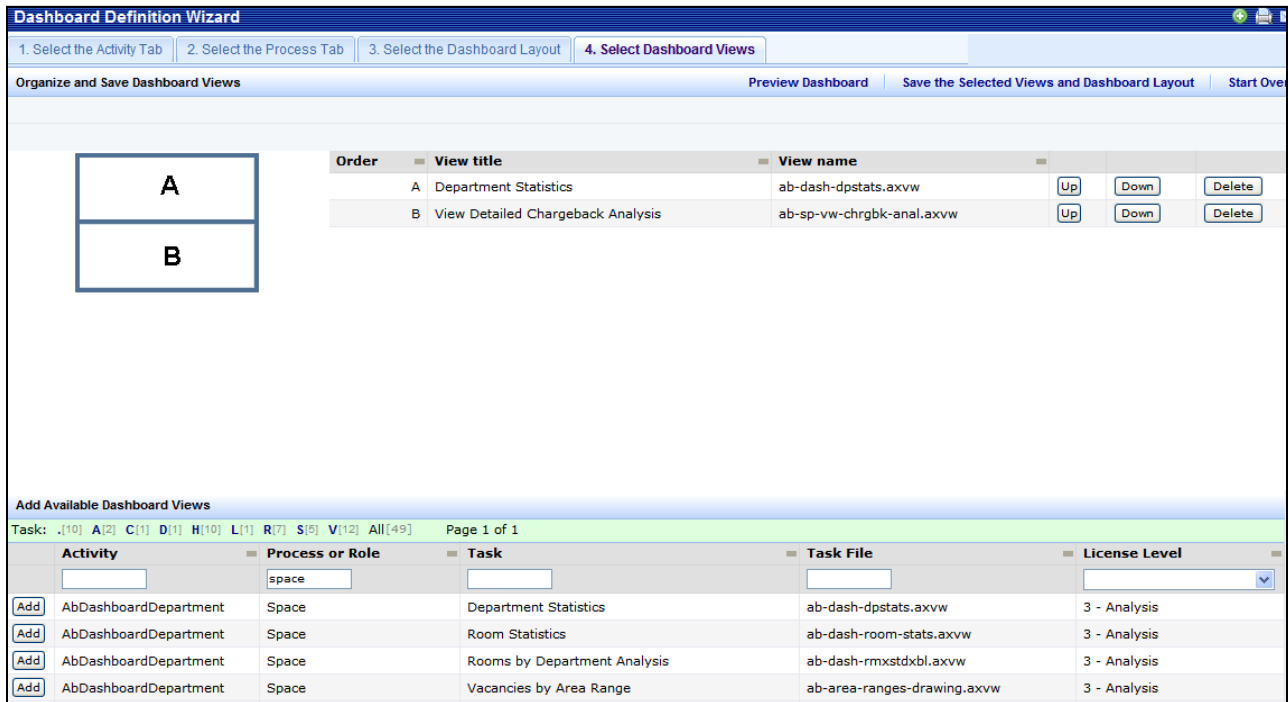
Step 3: Selecting a Layout

1. Select a dashboard layout.
2. Click "Select and Continue."



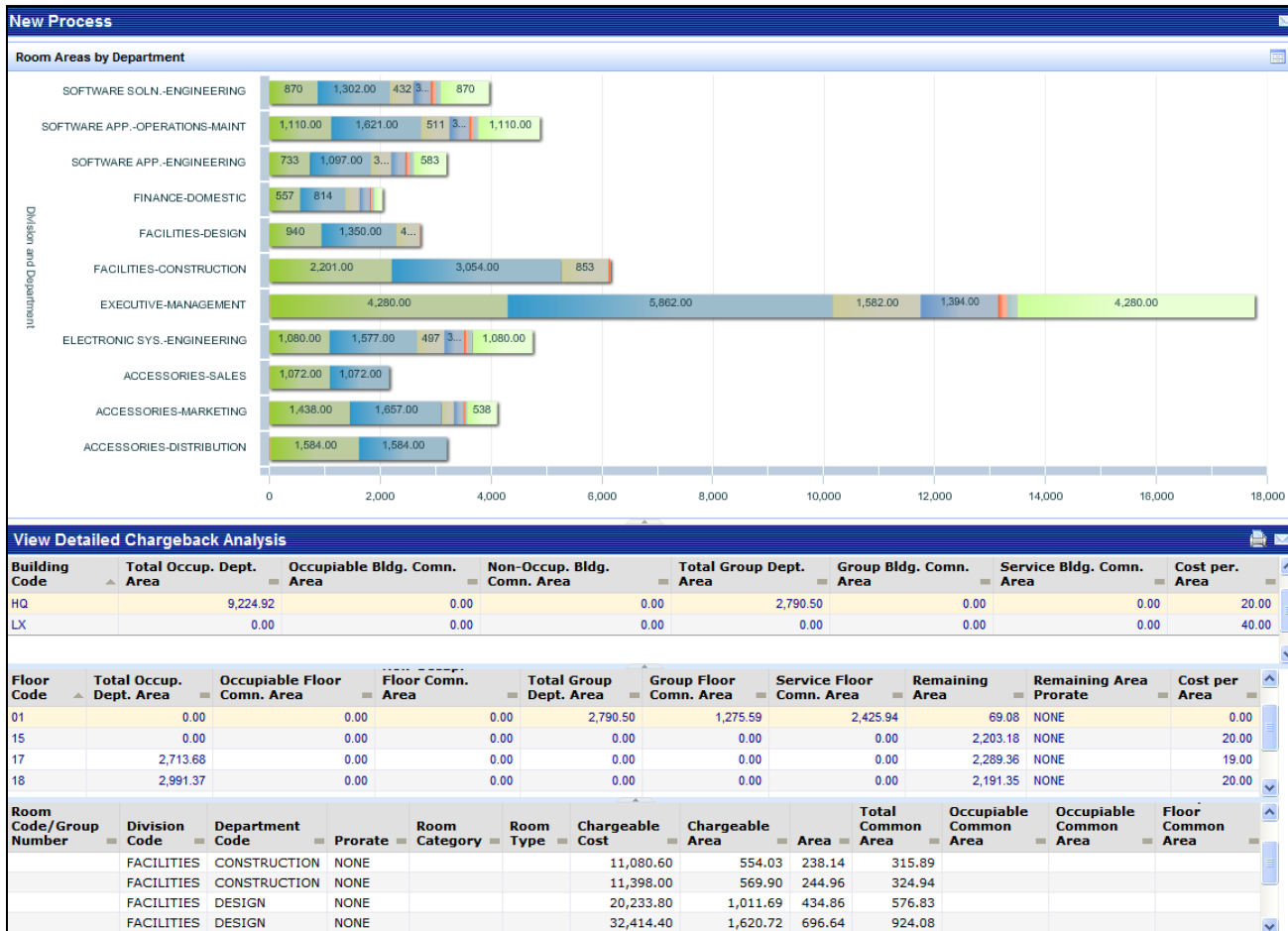
Step 4: Selecting Views

1. Click the Add button next to each view to be placed on the dashboard: one view for each panel.
2. Click "Preview Dashboard."

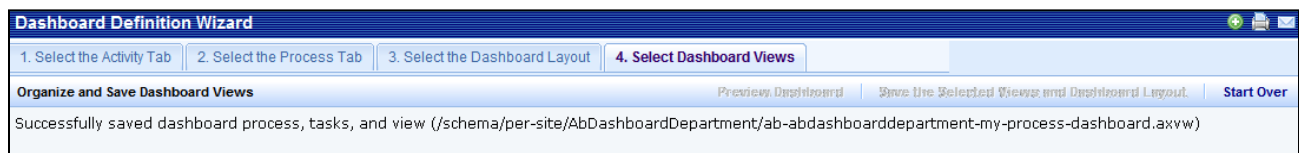


Step 5: Saving the Dashboard Process

1. If the Dashboard is acceptable, close the Preview.



2. Click "Save the Selected Views and Dashboard Layout." Record the name and location of the saved dashboard file.



Review Questions: Dashboard Definition Wizard

- 1.) How can data be displayed in a dashboard?
 - A. *As a summary chart or graph.*
 - B. *As a link to a Web page on the World Wide Web.*
 - C. *As a geospatial view of information using services from ESRI, Google Earth, Yahoo! Maps, etc.*
 - D. *All of the above.*

- 2.) Are the number of views in a dashboard limited?
 - A. *Yes, no more than 5 views are allowed in a dashboard.*
 - B. *Yes, no more than 9 views are allowed in a dashboard.*
 - C. *Yes, no more than 15 views are allowed in a dashboard.*
 - D. *No, views are only limited by screen size and good design.*

- 3.) Users can change dashboards by dragging and dropping views from the Process Navigator?
 - A. *False.*
 - B. *True.*

- 4.) All of the following are needed for a dashboard activity to appear in Step 1 of the DDW, except for which?
 - A. *The activity's "Active?" field must be set to "Yes."*
 - B. *The activity must have a "Web dashboard" process assigned.*
 - C. *The activity must be assigned to a user.*
 - D. *The activity must be licensed.*

- 5.) If a dashboard process is assigned a display order of "200," where will it appear in relation to one assigned a display order of "100" on the dashboard?
 - A. *To the left.*
 - B. *To the right.*
 - C. *Below.*
 - D. *Above.*

- 6.) What skill does an end-user need to replace views on the dashboard?
 - A. *Drag-and-drop.*
 - B. *Point-and-click.*
 - C. *Copy and paste*
 - D. *Double-click*

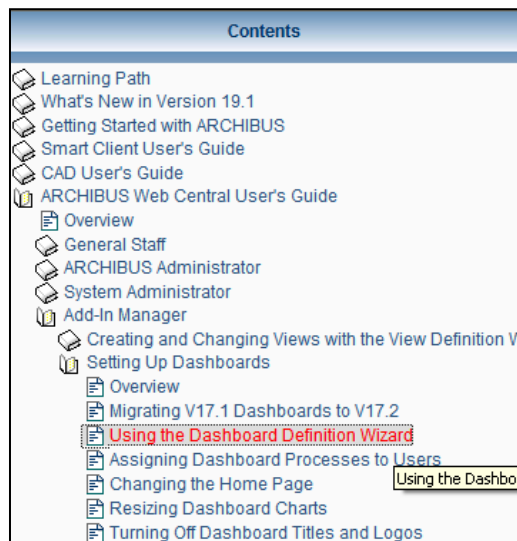
Appendix: Navigation: Dashboard Definition Wizard

Contents:

- Review Solutions

Further Reading:

For a better understanding of the Dashboard Definition Wizard, users should research the following topics using the Smart Client Contents and Index Help text:



Review Solutions: Dashboard Definition Wizard

- 1.) How can data be displayed in a dashboard?
 - A. As a summary chart or graph.
 - B. As a link to a Web page on the World Wide Web.
 - C. As a geospatial view of information using services from ESRI, Google Earth, Yahoo! Maps, etc.
 - D. **All of the above.**

- 2.) Are the number of views in a dashboard limited?
 - A. Yes, no more than 5 views are allowed in a dashboard.
 - B. Yes, no more than 9 views are allowed in a dashboard.
 - C. Yes, no more than 15 views are allowed in a dashboard.
 - D. **No, views are only limited by screen size and good design.**

- 3.) Users can change dashboards by dragging and dropping views from the Process Navigator?
 - A. False.
 - B. **True.**

- 4.) All of the following are needed for a dashboard activity to appear in Step 1 of the DDW, except for which?
 - A. The activity's "Active?" field must be set to "Yes."
 - B. The activity must have a "Web dashboard" process assigned.
 - C. **The activity must be assigned to a user.**
 - D. The activity must be licensed.

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 - A. To the left.
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 - A. **Drag-and-drop.**
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