

Technical Publication



Full Screen Dashboards

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Introduction

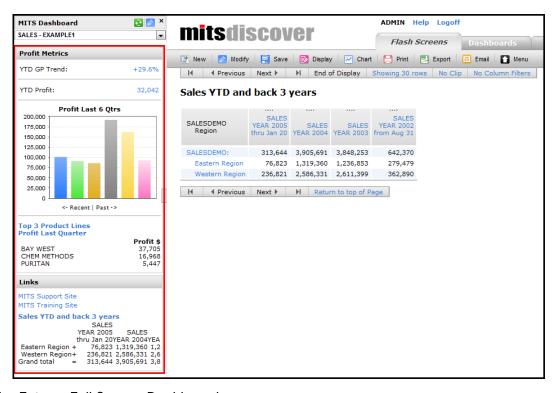
What is MITS Dashboard?

The MITS Dashboard add-on for the MITS Discover On-Line Analytical Processing (OLAP) software system provides an easy-to-use interface for creating small "indicators" that show a graphical representation of MITS Discover flash screen data. These are known as *dashboard objects*. Dashboard objects can be created to show charts, graphs, speedometers, thermometers, stoplights, the value from a single flash screen cell, or even a complete miniature flash screen. As the data in MITS Discover is updated, the dashboard objects are also updated.

In this technical document, we will discuss the process of taking your existing *side bar* dashboards and using them as the basis for creating a *full-screen* dashboard.

The Past: Side Bar Dashboards

Dashboard objects can then be brought together and "stacked" into a vertical *dashboard* (or *side bar*) which appears to the left of the MITS Discover browser client interface as outlined in red below:



The Future: Full-Screen Dashboards

A framework has been added in version 7.2 of MITS Discover which allows for the creation of dashboards that fill a much larger area of the browser window. These larger dashboards are called *full-screen dashboards*.

Before You Begin

Here is what you will need before you can start using MITS Dashboard to create full-screen dashboards:

- MITS Discover has been purchased, installed, and licensed (or is running in the initial 31-day evaluation mode)
- At least one MITS Discover Hypercube has been installed and populated with data
- MITS Dashboard has been purchased and licensed (or is running in the initial 31-day evaluation mode)
- MITS Dashboard has been initialized
- At least one dashboard library and at least one dashboard object library have been created and the appropriate security settings have been configured

Side bar dashboards can be created through the browser interface, but full-screen dashboards will require some deeper knowledge on a few topics. You should be comfortable with the following before you start:

- MITS Query Language (MQL) All MITS Discover flash screens have an MQL statement at their core. More information about MQL can be found in the MITS Discover User Guide, which can be downloaded from www.mits.com.
- MitsWeb Markup Language (MWML) Each dashboard object starts with an MWML statement. More information about MWML can be found in the MITS Dashboard Reference Guide, which can be downloaded from www.mits.com.
- Hypertext Markup Language (HTML) Much of the intermediate to advanced formatting possibilities for a full-screen dashboard will require some knowledge of HTML.

Here's the Scenario...

You are the server administrator for a large distribution company. The CEO of the company needs an easier method for acquiring a high-level overview of the state of the business. His needs can be outlined as follows:

- Sales summary showing sales and profit trends
- Accounts Receivable summary showing totals for any outstanding A/R
- Inventory summary showing branch performance and ROA
- Top 10 sales reps
- Top 5 customers
- It should be easy to read
- It needs to be fast he doesn't have time to wait for long queries to be run
- Better yet he'd like to have this delivered to his inbox twice per week

There's probably too much information here to try and cram it all into a side bar dashboard, but all of these requirements can be met much more easily using a full-screen dashboard.

Designing Your Dashboard

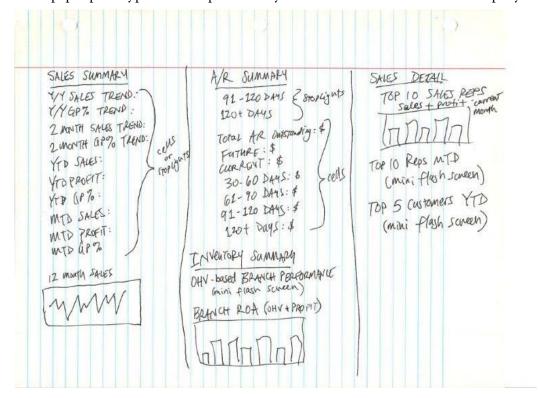
Before you begin any journey, it is important to know where you're headed. You may already know exactly what information you need in your dashboard, or you might only have a cursory idea of the types of information required. Either way, it is always a good idea to make a plan and know your goal before you start creating. One easy way to do this is to create a "paper prototype."

Create a "Paper Prototype"

Simply put, a paper prototype is nothing more than a hand-drawn sketch of how you want your dashboard to look. Here are some tips:

- Include information about the types of dashboard objects that will best serve the requirements (Charts, stoplights, grids, cells, etc.)
- Think about whether or not the requirements can be met with a side bar dashboard rather than a full-screen dashboard (as side bar dashboards are generally easier to create and maintain)
- Include the heading labels that will appear over each column and/or between sections
- Remember that a full-screen dashboard is made up of *columns*, columns are made up of *sections*, and sections are made up of *dashboard objects* (imported by reference or explicitly defined within the dashboard definition)

Here's the paper prototype that was provided by the CEO of our distribution company:



This example is obviously made up of three columns and can be broken down as follows:

- The first column includes a Sales Summary section with a collection of cell and/or stoplight dashboard objects along with a line graph at the bottom
- The second column includes two sections: an A/R Summary section and an Inventory Summary section
- The third column includes a Sales Detail section with a chart and a few miniature flash screens (or GRID dashboard objects)

Create a List of Required Dashboard Objects

After the dashboard has been designed on paper, go back over the design and make a list of the various types of dashboard objects that will need to be created. For example:

Headings: Sales Summary, A/R Summary, Inventory Summary, Sales Detail

Cells: YTD Sales, YTD Profit, YTD GP%, MTD Sales, MTD Profit, MTD GP%, Total A/R Outstanding (\$), Future AR (\$), Current AR (\$), 30-60 Day AR (\$), 61-90 Day AR (\$), 91-120 Day AR (\$), 120+ Day AR (\$)

Stoplights: Year over Year Monthly Sales Trend, Year over Year Monthly GP% Trend, Last 2 Months Sales Trend, Last 2 Months GP% Trend, AR 91-120 Days (%), AR 120+ Days (%)

Charts/Graphs: Sales Last 12 Months, Top 10 Sales Reps this Month by Sales Dollars

Grids: Branch Performance based on On-Hand Value, Top 10 Sales Reps Month-to-Date (Sales and Profit), Top 5 Customers Year-to-Date (Sales and Profit)

TIP: Before you move on to the next step, consider creating a flash screen library, a dashboard object library, and a dashboard library as temporary "holding tanks" for the components that will be used to create the final dashboard. And don't forget to grant yourself appropriate permissions to all of these libraries!

Prepare the Content

In this section, you will configure the flash screens and dashboard objects that will be used to populate your full-screen dashboard.

Create Flash Screens to Support the Creation of the Required Objects

This step involves the creation of flash screens that can be used to create many of the required dashboard objects. Here are some things to consider as you are creating these flash screens:

- Not all of the drill-down paths need to be explicitly defined in your flash screens, and you may not need to create a separate flash screen for two similar dashboard objects. For example, if you are creating a pair of stoplights to monitor profit dollars month-to-date for Branch A and for Branch B, you can create just one flash screen that shows Branch A in the results. You can then copy this MQL statement to create the flash screen for Branch B by modifying the branch value in the Identifiers section of the MQL statement.
- Keep in mind that these flash screens will in many cases become the "target" flash screens for situations where the dashboard objects are hyper linked, so keep that in mind as you are creating them.

TIP: If you have created a temporary "holding tank" flash screen library, save these flash screens to this library. This will help prevent the unnecessary cluttering of your "live" flash screen libraries.

Create Dashboard Objects Using the Dashboard Object Creator

When you have finished creating the necessary flash screens for your dashboard, the next step is to create the dashboard objects that will be used to make up your dashboard sections. The easiest way to do this is to use the dashboard object creator interface available in the MITS Discover browser client.

1. Log in to the MITS Discover browser client using a supported Web browser

NOTE: Refer to the MITS Discover Installation Guide for your current version to see which Web browsers are supported.

- 2. Open one of the flash screens you have already created
- 3. Click the New button in the MITS Discover tool bar and select Dashboard Object

TIP: If the "Dashboard Object" option does not appear under the "New" menu, your MITS Discover user account does not have write privileges to at least one Dashboard Object Library. Speak to your MITS Discover administrator or (if you have the proper access) log in to MitsAdmin and grant yourself the required privileges.

- **4.** From the **Select Dashboard Object Type** drop-down list, select the desired dashboard object type. (For this example, we will use the **Cell** dashboard object type. Your procedure will be a bit different if you select a different dashboard object type.)
- 5. Click Next
- 6. Click on the flash screen cell you want to display in your dashboard object
- 7. Click Next
- 8. Select the Dashboard Object Library where your dashboard object should be stored
- **9.** Provide a *Dashboard Object Name*. When working with side bar dashboards, your dashboard object names should be descriptive so that you know which one to select when creating your dashboard. When it comes to full screen dashboards, the name of the dashboard object is not important because we will only be utilizing the dashboard object's contents so name it in whatever way makes sense to you...as long as it's easy for you to find later.
- 10. If desired, enter some text that will appear before and/or after the cell value in the Text Before Cell and/or Text After Cell box(es)
- 11. Click Finish

If you have more dashboard objects to create from this same flash screen, click Create another Dashboard Object.

If your next dashboard object will be created from another flash screen, click **Close** and repeat the steps above to create the rest of your dashboard objects.

Not All Dashboard Objects are Created Equal...

As you are creating your dashboard objects, keep in mind that you won't necessarily be able to (or in some cases WANT to) create them all using the graphical interface. Some objects will need to be coded by hand, and there are two methods for accomplishing this:

- Manually create the objects (using the database command-line text editor) and save them in a dashboard object library file within the database
- Add the MWML code for the objects directly into the dashboard definition

NOTE: Dashboard objects are coded in a proprietary language called *MitsWeb Markup Language* (MWML). More information about MWML and the manual coding of dashboard objects can be found in the MITS Dashboard Reference Guide which is available from your MITS software provider.

Create a Side Bar Dashboard for Each Section

The next step is to create a separate side bar dashboard for each section of your full-screen dashboard. This is the point at which you will begin to see the structure of your full-screen dashboard come together. Refer back to your paper prototype as you begin these steps:

1. Log in to MITS Discover

- 2. Click on the Dashboards tab
- 3. Click New Dashboard
- **4.** From the **Dashboard Object Libraries** drop-down list, select your "holding tank" dashboard object library where you saved your component dashboard objects
- 5. Select the first object for the first section of the first column of your full-screen dashboard in the Available Objects list and click Add to Dashboard. (Don't worry about section headings at this point we'll add those later.)

Repeat the above steps until you have added all of the dashboard objects for the first section of the first column of your full-screen dashboard.

- 6. Select your "holding tank" dashboard library from the Dashboard Library drop-down list
- 7. Enter a unique ID in the Dashboard ID text box
- TIP: Consider basing the names of these section-based dashboards on the section headings you will eventually use. For example, based on our paper prototype above, we may want to give our component dashboard an ID of SALES.SUMMARY.
- 8. Clear the Set as default dashboard check box
- 9. Click Save
- **10.** Repeat to create one side bar dashboard for each section of each column that appears on your paper prototype. In our example, we would be creating four side bar dashboards: SALES.SUMMARY, AR.SUMMARY, INVENTORY.SUMMARY, and SALES.DETAIL.

Prepare the Full-Screen Dashboard Framework

When you create a standard side bar dashboard using the MITS Discover interface, a record is written to the selected dashboard library (named MITS.DASHBOARDS_Name>) with the specified record ID. Full-screen dashboards are created by hand in one of your existing dashboard libraries - right alongside your side bar dashboards. Besides the content (which we will discuss in a moment), the one defining difference between a side bar dashboard and a full-screen dashboard is the fact that the record ID of a full-screen dashboard always start with "FS.". For example, a dashboard item with an ID of SALES.DASH would be a full-screen dashboard.

- **1.** Using your database's command-line text editor, create a new item in an existing dashboard library. The record ID should adhere to the following conventions:
 - Begins with "FS."
 - Is Descriptive (as this is what users will see when they are selecting which dashboard to execute)
 - No spaces or punctuation other than a period (.)
 - All capital letters (this is optional but recommended)
- **2.** Type (or copy/paste) the following full-screen dashboard template into your new dashboard record:

```
{TEMPLATE ID="DASHBOARD.OPEN"}
</di v></di v>
<tabl e>
 {SECTION. HEADING HEADING="heading1"}
       <!-- section 1 dashboard objects go here -->
     {SECTION. END}
   {SECTION. HEADING HEADING="heading2"}
       <!-- section 2 dashboard objects go here -->
     {SECTION. END}
   {SECTION. HEADING HEADING="heading3"}
       <!-- section 3 dashboard objects go here -->
     {SECTION. END}
   <di v><di v>
{TEMPLATE ID="DASHBOARD.CLOSE"}
```

The "columns" of your full-screen dashboard will be built between the </d> tags, and the "sections" will be built between the {SECTION. HEADING} and {SECTION. END} MWML tags. Dashboard objects will be defined and/or referenced between these tags as required.

- **4.** Add the text for the headings within each {SECTI ON. HEADI NG} tag. For example, if the section you're adding will have a heading of "Sales Detail," your tag should be modified to look like this:

```
{SECTION. HEADING HEADING="Sales Detail"}
```

The template for the example from the paper prototype section earlier in this document would now look something like this:

```
{TEMPLATE ID="DASHBOARD.OPEN"}
</di v></di v>
<tabl e>
 {SECTION. HEADING HEADING="Sales Summary"}
        <!-- Sales Summary dashboard objects go here -->
     {SECTION. END}
    {SECTION. HEADING HEADING="A/R Summary"}
       <!-- A/R Summary dashboard objects go here -->
     {SECTION. END}
     {SECTION. HEADING HEADING="Inventory Summary"}
        <!-- Inventory Summary dashboard objects go here -->
     {SECTI ON. END}
    {SECTION. HEADING HEADING="Sales Detail"}
        <!-- Sales Detail dashboard objects go here -->
     {SECTION. END}
    <di v><di v>
{TEMPLATE ID="DASHBOARD.CLOSE"}
```

Add Dashboard Contents to the Framework

The final step in creating your full-screen dashboard is to add the dashboard object references from the side bar dashboards that you have created. This will be done by manually editing the "FS." dashboard record; only this time we will replace the comments between the SECTION tags with a portion of the contents from your individual side bar dashboards.

- 1. Using the database command-line text editor, open the "framework" dashboard definition you created above. For ease of editing, we recommend copying the contents out of this record and pasting them into a graphical text editor.
- **2.** Locate the side bar dashboard for your first section in the first column of your full-screen dashboard. The record will be stored in a file named MITS.DASHBOARDS_LibName, where libName is the name of the dashboard library where the side bar dashboard was saved. The record ID will be the dashboard ID you specified when creating the dashboard.
- **3.** Again, for ease of editing, we recommend copying the contents out of this record and pasting them into a graphical text editor. The contents of this record will look something like this:

```
<!-- Created By MITS$DASHBOARD. ORGANIZER -->
{TEMPLATE ID="DASHBOARD. OPEN"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="STOPLIGHT. SALES. TRENDS. M2. Y"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="STOPLIGHT. GPP. TRENDS. M2. Y"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="STOPLIGHT. SALES. TRENDS. M2"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="STOPLIGHT. GPP. TRENDS. M2"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. SALES. YTD"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. PROFIT. YTD"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. GPP. YTD"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. SALES. MTD"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. PROFIT. MTD"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. GPP. MTD"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. GPP. MTD"}
{DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. GPP. MTD"}
{TEMPLATE ID="DASHBOARD. CLOSE"}
```

4. Strip off the comment and {TEMPLATE} tag from the top as well as the {TEMPLATE} tag from the bottom, leaving the following:

```
{DASHBOARD. OBJECT LI BRARY="SALES" ID="STOPLIGHT. SALES. TRENDS. M2. Y"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="STOPLIGHT. GPP. TRENDS. M2. Y"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="STOPLIGHT. SALES. TRENDS. M2"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="STOPLIGHT. GPP. TRENDS. M2"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="CELL. SALES. YTD"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="CELL. PROFIT. YTD"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="CELL. GPP. YTD"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="CELL. SALES. MTD"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="CELL. PROFIT. MTD"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="CELL. GPP. MTD"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="CELL. GPP. MTD"}
{DASHBOARD. OBJECT LI BRARY="SALES" ID="CELL. GPP. MTD"}
```

5. Copy/paste the remaining contents between the first set of SECTION tags within the full-screen dashboard template. The template should now look similar to the following:

```
{TEMPLATE ID="DASHBOARD.OPEN"}
</di v></di v>
<ht>
      {SECTION. HEADING HEADING="Sales Summary"}
        <!-- Sales Summary dashboard objects go here -->
        {DASHBOARD. OBJECT_LIBRARY="SALES" | ID="STOPLIGHT. SALES. TRENDS. M2. Y"}
        {DASHBOARD. OBJECT_LIBRARY="SALES" | ID="STOPLIGHT. GPP. TRENDS. M2. Y"}
        {DASHBOARD.OBJECT_LIBRARY="SALES" ID="STOPLIGHT.SALES.TRENDS.M2"}
        {DASHBOARD. OBJECT_LIBRARY="SALES" | ID="STOPLIGHT. GPP. TRENDS. M2"}
        {DASHBOARD.OBJECT_LIBRARY="SALES" ID="CELL.SALES.YTD"}
        {DASHBOARD.OBJECT_LIBRARY="SALES" | D="CELL.PROFIT.YTD"}
        {DASHBOARD.OBJECT_LIBRARY="SALES" ID="CELL.GPP.YTD"}
        {DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. SALES. MTD"}
        {DASHBOARD.OBJECT_LIBRARY="SALES" ID="CELL.PROFIT.MTD"}
        {DASHBOARD.OBJECT_LIBRARY="SALES" ID="CELL.GPP.MTD"}
        {DASHBOARD.OBJECT_LIBRARY="SALES" | D="DCHART.SALES.M12"}
      {SECTION. END}
    {SECTION. HEADING HEADING="A/R Summary"}
        <!-- A/R Summary dashboard objects go here -->
      {SECTION. END}
      {SECTION. HEADING HEADING="Inventory Summary"}
        <!-- Inventory Summary dashboard objects go here -->
      {SECTI ON. END}
    {SECTION. HEADING HEADING="Sales Detail"}
        <!-- Sales Detail dashboard objects go here -->
      {SECTION. END}
    <di v><di v>
{TEMPLATE ID="DASHBOARD.CLOSE"}
```

6. Repeat as necessary until all of the dashboard objects for each section have been entered.

NOTE: Alternately, you can paste the entire MWML statement from attribute 2 of the dashboard object record directly into the dashboard definition. Importing by reference will mean that any changes to that dashboard object in the future will be automatically applied to your full-screen dashboard. Importing by directly pasting the MWML statement will mean that future changes will have to be manually applied directly to the dashboard definition.

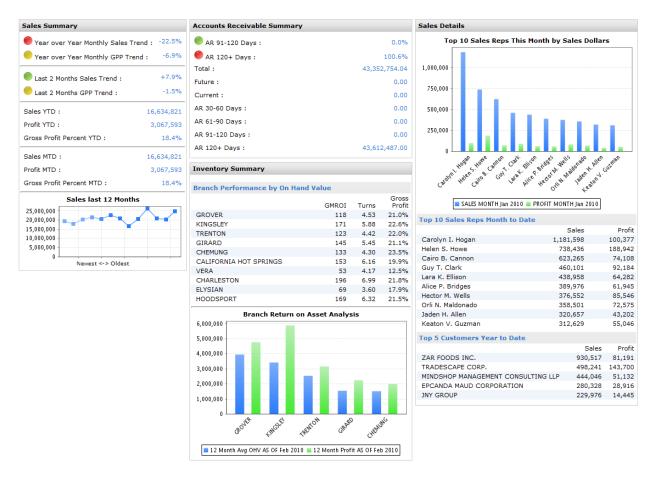
TIP: To insert a line between two objects in a section, insert "<hr/> "between them in your dashboard definition. See the example below.

7. When the dashboard objects for each section and column have been added, paste the contents of the full-screen dashboard definition back into your "FS." record in the MITS.DASHBOARDS_<libName> file.

NOTE: You will find the dashboard code for the paper prototype example at the end of this document.

View Your New Full-Screen Dashboard

As soon as your dashboard definition has been saved to a dashboard library, you are ready to view your results. Log in to MITS Discover, navigate to the **Dashboards** tab, and select your new full-screen dashboard:



Mission Accomplished!

Now that we have created the full-screen dashboard that was requested by the company CEO, we can either copy the definition to a dashboard library that he already has access to or grant him access to the dashboard library where this dashboard has been saved. Once that has been done, you can even set up a scheduled email job through the MITS Discover browser interface that will deliver this full-screen dashboard via e-mail as a static PDF file.

Dashboard Code from Paper Prototype Example

```
{TEMPLATE ID="DASHBOARD.OPEN"}
</di v></di v>
<tabl e>
  {SECTION. HEADING HEADING="Sales Summary"}
        <! -- Sales Summary dashboard objects go here -->
         {DASHBOARD. OBJECT_LIBRARY="SALES" | ID="STOPLIGHT. SALES. TRENDS. M2. Y"}
         {DASHBOARD.OBJECT_LIBRARY="SALES" | ID="STOPLIGHT.GPP.TRENDS.M2.Y"}
         {DASHBOARD.OBJECT_LIBRARY="SALES" | D="STOPLIGHT. SALES. TRENDS. M2"}
         {DASHBOARD. OBJECT_LIBRARY="SALES" | ID="STOPLIGHT. GPP. TRENDS. M2"}
         {DASHBOARD.OBJECT_LIBRARY="SALES" | ID="CELL.SALES.YTD"}
         {DASHBOARD.OBJECT_LIBRARY="SALES" ID="CELL.PROFIT.YTD"}
         {DASHBOARD. OBJECT LIBRARY="SALES" ID="CELL. GPP. YTD"}
         <hr/>
         {DASHBOARD.OBJECT LIBRARY="SALES" ID="CELL.SALES.MTD"}
         {DASHBOARD.OBJECT_LIBRARY="SALES" ID="CELL.PROFIT.MTD"}
         {DASHBOARD.OBJECT_LIBRARY="SALES" ID="CELL.GPP.MTD"}
         {DASHBOARD.OBJECT_LIBRARY="SALES" ID="DCHART.SALES.M12"}
      { SECTI ON. END }
    {SECTION. HEADING HEADING="A/R Summary"}
        <!-- A/R Summary dashboard objects go here -->
         {DASHBOARD. OBJECT_LIBRARY="AR" | ID="STOPLIGHT. AR. 90120. PCT"}
         {DASHBOARD. OBJECT_LIBRARY="AR" | ID="STOPLIGHT. AR. 120. PCT" }
         {DASHBOARD.OBJECT_LIBRARY="AR" ID="CELL.AR.TOT"}
         {DASHBOARD.OBJECT_LIBRARY="AR"_ID="CELL.AR.FUT"}
         {DASHBOARD. OBJECT_LIBRARY="AR" ID="CELL. AR. CUR"}
         {DASHBOARD. OBJECT_LIBRARY="AR" | ID="CELL. AR. 3060"}
         {DASHBOARD. OBJECT_LIBRARY="AR" | ID="CELL. AR. 6090"}
         {DASHBOARD. OBJECT_LIBRARY="AR" ID="CELL. AR. 90120"}
         {DASHBOARD. OBJECT_LIBRARY="AR" | ID="CELL. AR. 120"}
      { SECTI ON. END }
      {SECTION. HEADING HEADING="Inventory Summary"}
         <!-- Inventory Summary dashboard objects go here -->
         {DASHBOARD.OBJECT_LIBRARY="INV" ID="CELL.INV.OHV"}
         {DASHBOARD.OBJECT_LIBRARY="INV" ID="CELL.INV.OHV"}
         {DASHBOARD.OBJECT_LIBRARY="INV" ID="CELL.INV.GMROI"}
         {DASHBOARD.OBJECT_LIBRARY="INV" ID="STOPLIGHT.INV.OHV.TREND.M2"}
         {DASHBOARD.OBJECT_LIBRARY="INV" ID="STOPLIGHT.INV.TURNS.TREND.M2"}
         {DASHBOARD. OBJECT_LIBRARY="INV" ID="STOPLIGHT. INV. GMROI. TREND. M2"}
         {DASHBOARD. OBJECT_LIBRARY="INV" ID="GRID. INV. BR. TOP10. PERF. OHV"}
         <hr/>
```

```
{DASHBOARD. OBJECT LIBRARY="INV" ID="DCHART. BRANCH. ROA. TOP5"}

{SECTION. END}

(SECTION. HEADING HEADING="Sales Detail"}

<!-- Sales Detail dashboard objects go here -->

{DASHBOARD. OBJECT LIBRARY="SALES" ID="DCHART. SALES. TOP10. SR. M"}

{DASHBOARD. OBJECT LIBRARY="SALES" ID="DCHART. SALES. TOP10. SR. M"}

{DASHBOARD. OBJECT LIBRARY="SALES" ID="GRID. SALES. TOP5. BT. Y"}

{SECTION. END}

<
```