PRODUCT MANUAL

Retail Executive Scorecard
Stores With Most Returns - Top 5

Store	Returns
Store 101	$8,341
Store 102	$8,866
Store 201	$10,020
Store 301	$10,172
Store 302	$8,038
Summary	**$45,437**

Store Sales by State

State	Sales
AR	$11,427.29
AZ	$14,526.93
CA	$14,368.02
CO	$10,081.99
DE	$17,709.72
FL	$13,830.31
GA	$11,278.70
HI	$14,066.78
IA	$10,835.90
IL	$7,460.44

Bookmarks:
- Stores With Most Returns - Top 5
- Store Sales by State
- Product Cost and Profitability
  - Department 1
  - Department 2
  - Department 3
  - Department 4

iDashboards Cloud Reports Manual
Version 9.6

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1 Introduction

iDashboards Reports is functionality that generates data reports based upon data used to display a live chart or dashboard. The reports generated represent values from a snap-shot taken at a particular time. All of the graphical values used to display each chart are displayed all at once within a report, regardless of the number of charts or pivots that were used to display the dashboard. The report settings that control target data and the visual settings are described within this manual.

iDashboards Reports provides the following capabilities:

- Security to determine who is able to generate reports.

- Real-Time report generation from the client interface.

- Report generation on a single chart or an entire dashboard.

- Multiple output formats.

- Custom themes to personalize visual settings.

The two primary components of reporting in iDashboards involve:

- Designing a report – Specifying report properties that tell what information iDashboards should display and how it should look.

- Viewing a report – Running a report using default settings or specific settings that were defined during the design stage.

2 Generating Reports

Users can generate a report based on a dashboard or based on a chart. Generating a report can utilize default settings or custom settings based on changes made to the visual settings. See the related sections within this manual on how to edit custom properties used by reporting. The results of a report can generate anywhere between 1 and 100+ pages of data.

Reports has a layout used to display each section of the report (see Figure 2-1). The sections are:

- **Dashboard Name:** The title of the dashboard.

- **Chart Title:** The title of a chart.

- **Pivot Name:** The values of any pivot(s).

- **Axis Names:** The x-axis and y-axes values.

- **Data Values:** The data values.

- **Summary Row:** The aggregate of a numeric column

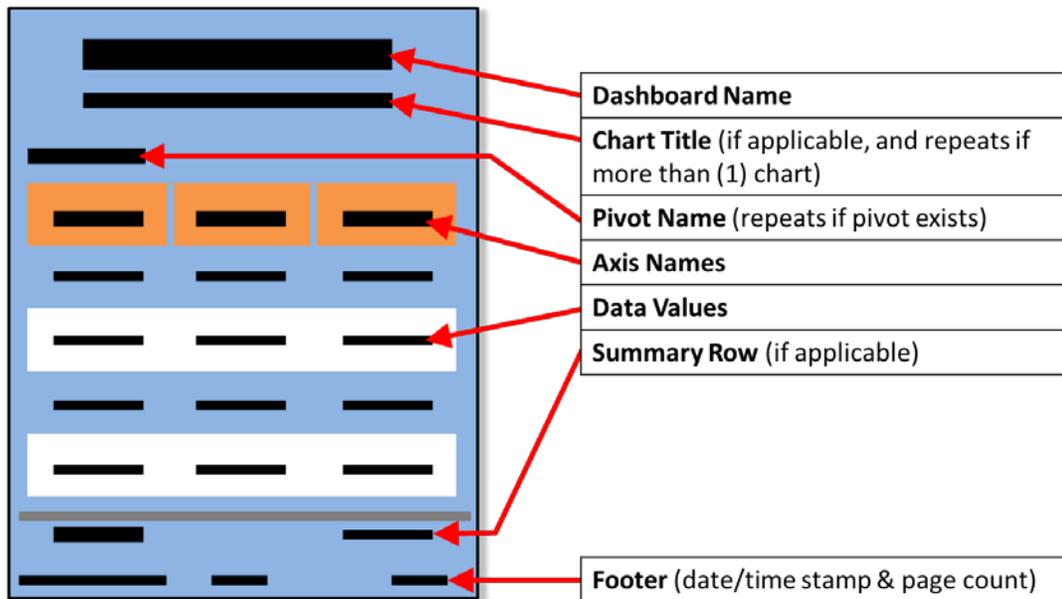- **Footer:** Information on when the report was generated, on each page

| Dashboard Name |
| Chart Title (if applicable, and repeats if more than (1) chart) |
| Pivot Name (repeats if pivot exists) |
| Axis Names |
| Data Values |
| Summary Row (if applicable) |
| Footer (date/time stamp & page count) |

Figure 2-1

2.1 Generating the Report

There are many ways to generate a report. Some methods of executing the command will ask for an output type (HTML, PDF) and the other methods will utilize the default chart or dashboard report property. Executing a report always requires a dashboard to be opened.

2.1.1 Menu Buttons

Various menu buttons and right-click menus will have options to run a report. The Application Menu, Chart Menus and right-click menus all contain options to run reports.

- **Dashboard Report** - Use the Application Menu button to access the 'View Dashboard as Report' option. An output type must be selected.
- **Dashboard Report** – Right-click the Category title bar or dashboard title bar and select "View Dashboard as Report. The output type will used the defined value.
- **Chart Report** – To use the "Chart Menu" button to generate a report, the Dashboard Property 'Show chart-menu buttons' must be turned on. Turning on chart menu buttons requires the User or higher role. Use this option to access the 'View Chart as Report' option. An output type must be selected.
- **Chart Report** – Right-click above a chart and select "View Chart as Report. The output type will used the defined value.

2.1.2 Icon

The "Report" icon appears in the lower-right corner of the iDashboards framework. Depending on the click option (see below) this button will create a dashboard report when a dashboard is open (see Figure 2-2).
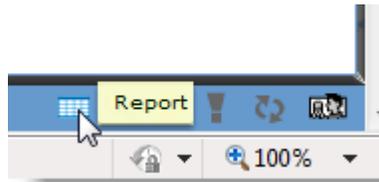

Figure 2-2

- **Left-Click (One-Click)** – Left-click the "Report" icon shown in Figure 2-2, a dashboard report will be generated with a single click. The settings defined within the **Dashboard Report Properties** will be used to create the report.
- **Right-Click** – Right-clicking the "Report" icon (see Figure 2-3) will allow an alternate output format to be selected instead of using the dashboard default format. The settings defined within the **Dashboard Report Properties** will be overridden if an alternate option is selected.
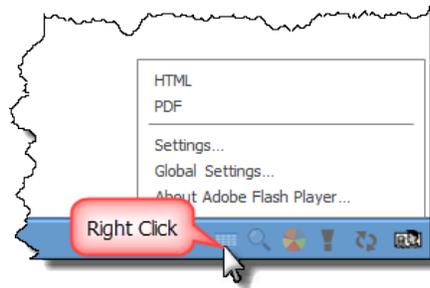
Figure 2-3

2.1.3   Drilldown to Report

Note: Refer to the iDashboards User's Manual for complete information about drilldown functionality.

A dashboard or chart report may be a drilldown target. Drilldown targets are properties that are configured with each chart at design time. When configuring a chart drilldown, the user may select to either drilldown to a dashboard report with the 'Drilldown to Report' option (see Figure 2-4) or to drill down to a chart report with the 'Drilldown to Chart Report' option (see Figure 2-5). The report will be generated in the format that is defined in the **Chart Properties** window.
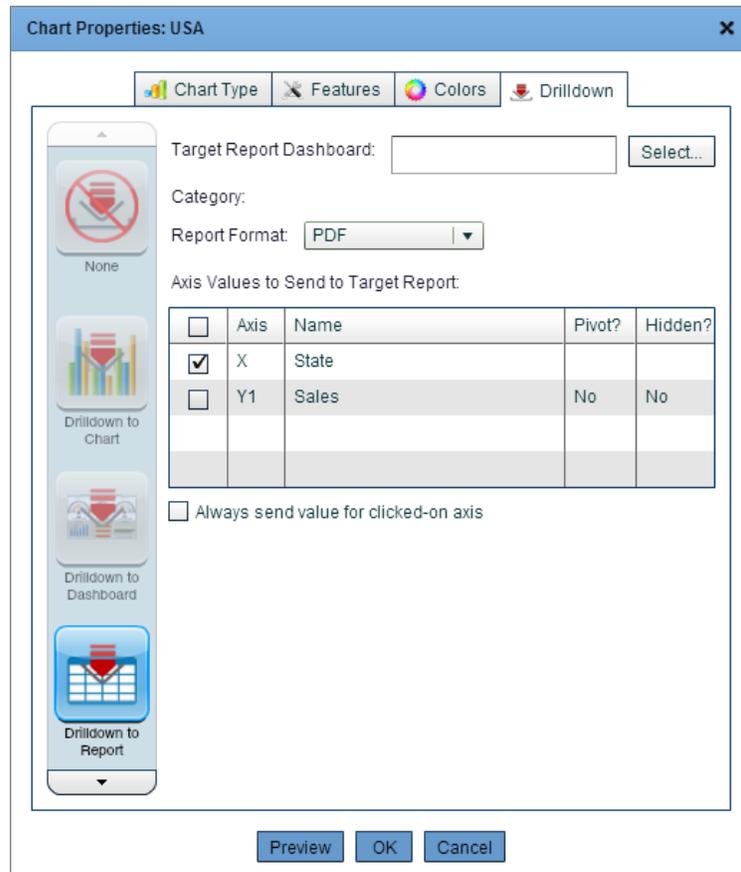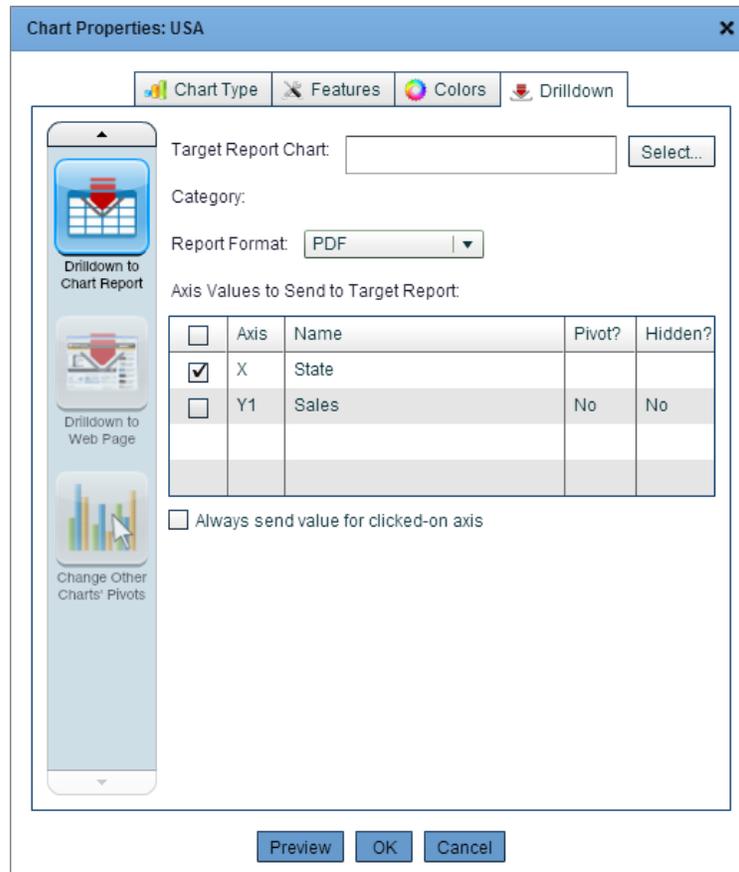
Figure 2-4

Figure 2-5

2.1.4 Input Parameter Considerations

There are three scenarios when running a report where input parameters are involved. Each option is specific to how the input parameters were defined during the chart or dashboard creation. See the iDashboards User's Manual for complete information on input parameters.

2.1.4.1 *Input Parameters and Report Generation*

A user can initiate any of the commands that will generate a report on a chart or dashboard that has input parameters. If the user is already viewing the results of the input parameter on a chart or dashboard, then the results of the report will be based on the filtered data already observed within that chart or dashboard.

2.1.4.2 *Input Parameters and Drilldown to a Report*

Here, there are two workflows that are the result of a single setting. One way will require an additional prompt when generating a report, and the other way will not.

2.1.4.2.1 Always Prompt: Disabled

With the 'Always prompt for parameters on dashboards load:' setting disabled within the input parameters dialog box, this chart or dashboard will not display a prompt if it is the target for a drilldown report (see Figure 2-6).

Always prompt for parameters on dashboard load: ☐

Figure 2-6

2.1.4.2.2 Always Prompt: Enabled

With the 'Always prompt for parameters on dashboards load:' setting enabled within the input parameters dialog box, this chart or dashboard will display an additional prompt if it is the target for a drilldown report (see Figure 2-7).

Always prompt for parameters on dashboard load: ☑

Figure 2-7

The user will receive an HTML prompt requesting the necessary input parameters before generating the report (see Figure 2-8).
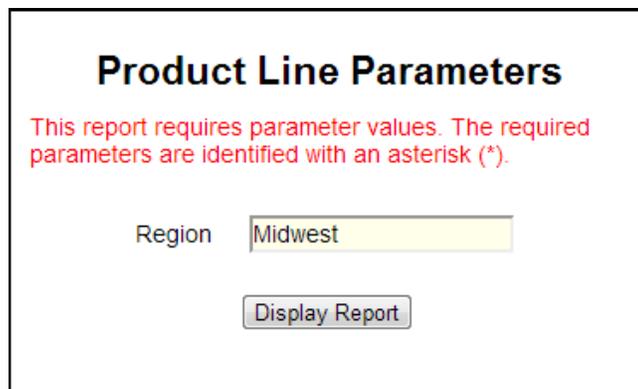
Product Line Parameters

This report requires parameter values. The required parameters are identified with an asterisk (*).

Region   Midwest

Display Report

Figure 2-8

2.2 Outputs

There is an option to have either HTML or PDF output for any report. iDashboards Reports contains the ability to generate PDF files. It is not necessary to install Adobe® Acrobat® or any other PDF generator to generate the report. For both output types the report will try to

open the report in a new browser window. If a PDF reader cannot be found on the local system to open the document, the browser will prompt to save the report.

Note: The default value is 'PDF'.

2.3 International Number Formatting

iDashboards can be used across international standards where number formatting varies between locales. Generally, the chart properties that display a particular format for the thousands and decimal separator will match the same format as the server locale.

There are three possible separator combination formats that a chart can use and where the report will display the same format.

Thousands Separator	Decimal Separator	Example
, (comma)	. (period)	12,345.678
. (period)	, (comma)	12.345,678
(space)	, (comma)	12 345,678

Note: The thousands separator may be omitted in any of the above combinations, but a decimal separator is mandatory.

If the chart number formatting properties do not use one of combinations from above then the separator delimiters will be defined by the server locale where iDashboards is installed. Based on the settings for the server locale, formats around the globe should be applied to reports in the correct way for their locale.

2.4 Report Footer

Default data will appear within the footer on all reports generated by iDashboards. The values are: long-date value stating when report was generated (e.g. Generated: 04/12/2013 03:02:54 PM), current page number, and total pages in report (see Figure 2-9).
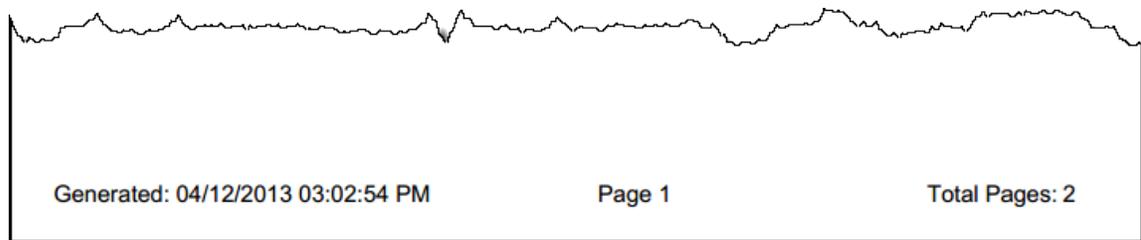

Generated: 04/12/2013 03:02:54 PM   Page 1   Total Pages: 2

Figure 2-9

2.5 Reports Considerations

2.5.1 Report Data

iDashboards Reports will gather data for the report re-querying the server, not from the data that is loaded into the charts when the charts were loaded. For example, if a dashboard is loaded at 9am and, provided for some reason the session does not timeout, a report is run at 5pm the data will be reflective of the data at 5pm not 9am.

2.5.2 Dashboards with Drilldowns

If you run an iDashboards report on a dashboard and the dashboard is visualizing a chart that has been drilled down to (a target chart), then the report will display only the top level chart. The iDashboards Reports engine queries the dashboard information from the repository but does not recursively obtain drilldown chart or dashboard data.

3 Chart Reporting

A chart report can be generated on any dashboard using out-of-the-box settings. However, iDashboards offers a variety of settings that allow users the ability to customize the appearance of each chart report.

Changes made to the chart report properties are automatically saved to the chart when the edits are made. This allows all iDashboards users to leverage changes made to the report properties.

3.1 Accessing Chart Report Properties

To access the **Chart Report Properties**, right-click on a chart and select the 'More Options…', then select Chart Report Properties.

One way to access the **Chart Report Properties**, is through the "Chart-Menu" button. Alternatively, click "Chart-Menu" from the Chart Menu button of the desired frame.

Next, a **Chart Report Properties** window appears enabling the user to customize various aspects of the report including format, summaries, fonts and colors (see Figure 3-1).
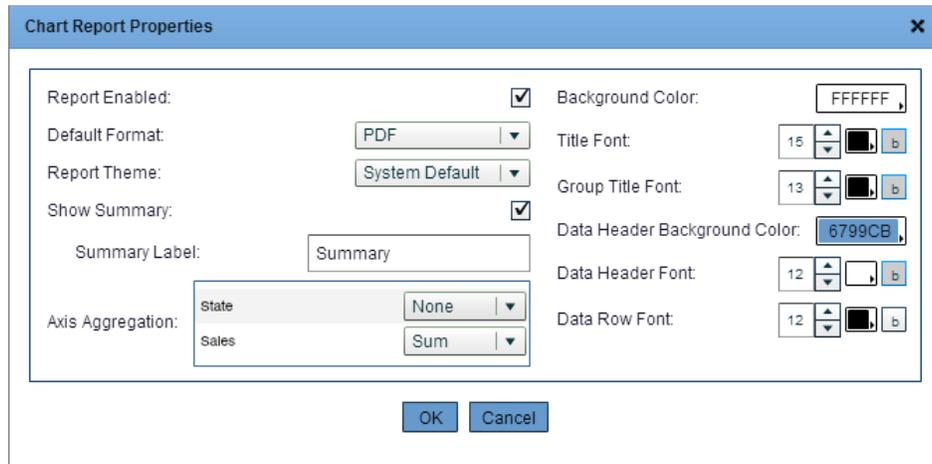
Figure 3-1

Note: Dashboard report properties will not use chart properties edited using this procedure. These settings are for generating reports on individual charts. See Chapter 4, "Dashboard Reporting" for more information on changing report settings for dashboards.

Note: Through this window, changes made to the chart report properties are saved with the chart. When working with a chart that is used by multiple dashboards, changes made to a chart from one dashboard will be reflected by another dashboard that contains the same chart.

3.2 Chart Report Properties

3.2.1 Report Enabled
Reporting is an available function within all charts and dashboards. The 'Report Enabled' setting controls whether or not a chart is allowed to be turned into a report. If the checkbox is selected, a report can be run on this chart; this is the default setting. If the checkbox is cleared, the chart cannot be turned into a report and a message will be displayed.

3.2.2 Default Report Format
Based on the method used to run a report, this option will control the default output format. One-click options to generate a report will use the format selected in this setting. Other options to generate a report will allow this setting to be overridden.

3.2.3 Report Theme
As discussed in Chapter 5, "Reports Themes", themes can be applied to a chart to help quickly apply pre-defined values that adjust the visual settings within the report. There are three options for the Report Theme.

1. By default, this selection will be set to "System Default". This option will use settings defined by the system that cannot be altered.

2. Any changes made to the visual settings will cause the theme selection to change from "System Default" to <blank>.

3. The other option is to select a pre-defined theme from the list. Themes are discussed in Chapter 5, "Reports Themes".

Note: Report Themes applied to a chart will not use the 'Report Title Font' item. That item is used to separate the various charts that would appear in a dashboard report.

3.2.4 Visual Settings for Charts
The visual settings for a chart report can be entirely controlled in the **Chart Report Properties** window (see Figure 3-2). Users can begin editing each property from scratch, or start with selecting an existing theme as a template. Themes are discussed in Chapter 5, "Reports Themes".
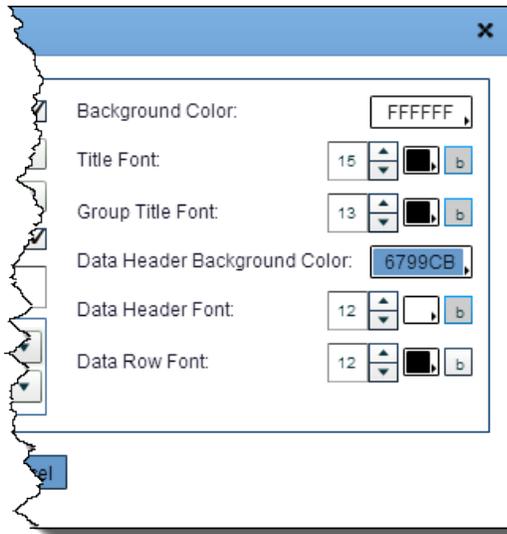
Figure 3-2

When editing the visual settings from this window, iDashboards will cause a warning window to appear. Accepting the warning will automatically adjust the theme to <blank>. This is normal behavior since the user has chosen not to use an existing theme or the system default. This message will always be displayed unless the 'Do not display this dialog again' checkbox is checked.

3.2.4.1 Details
Visual settings are used to control the appearance of a report.

For each item, there are three property types available for edit: Font Size, Font Color, and Bold-type. Each property type is organized into three columns as shown in Figure 3-3.
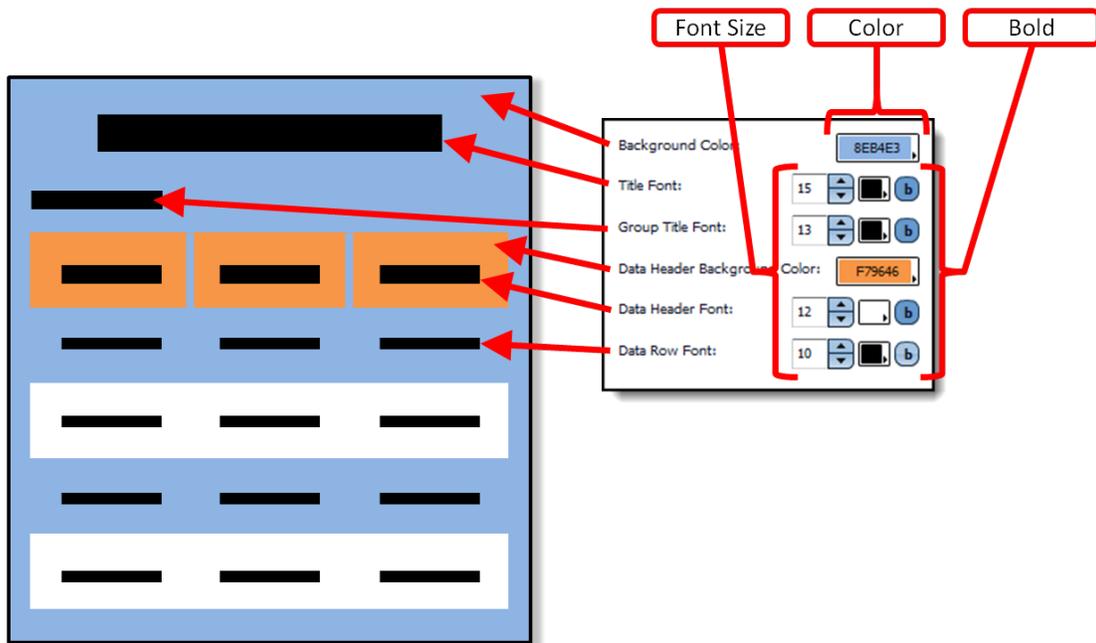
Figure 3-3

Within the chart visual settings, it is possible to edit the following items:

- **Background Color:** The color that is displayed behind the report. The iDashboards color picker will be displayed when clicked.

- **Title Font:** The size, color and bold-type of the font that will be displayed as the chart title. This title corresponds to the title displayed on the chart.

- **Group Title Font:** The size, color and bold-type of the font that will be displayed as the sections of the chart. This title corresponds to the pivot values.

- **Data Header Background Color:** The color of the header of the data columns. This color will outline the header.

- **Data Header Font:** The size, color and bold-type of the font that will be displayed as the data columns. This header corresponds to the logical names given to the axes. Only displayed axes, both x- and y-, are displayed in the header.

- **Data Row Font:** The size, color and bold-type of the font that will be displayed as the chart data. This data corresponds to the data values displayed on the chart.

3.2.5 Chart Options
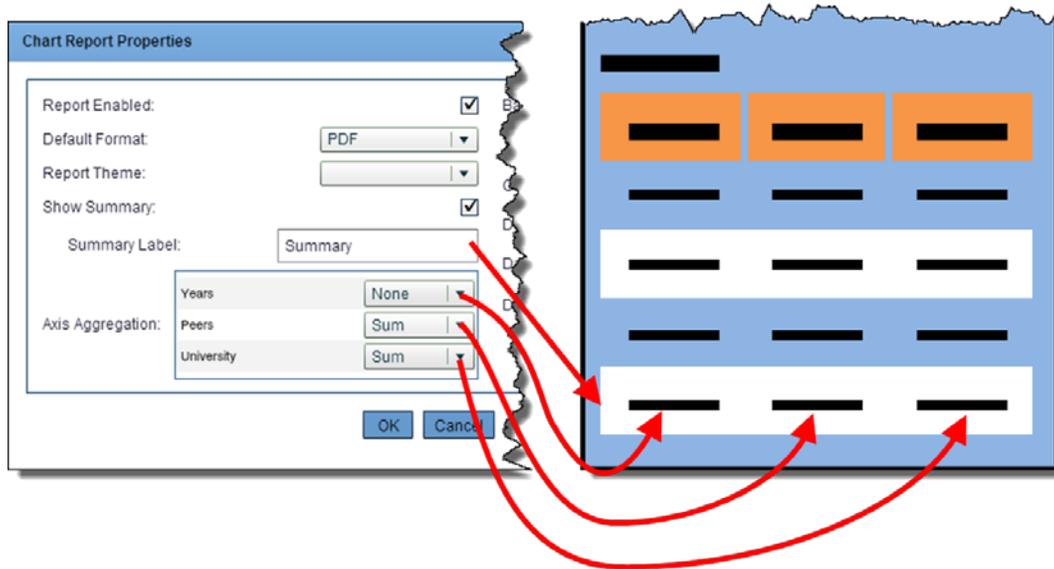The appearance of chart data within the chart report can be altered with various settings (see Figure 3-4).

Figure 3-4

3.2.5.1 Show Summary

The default value for all charts is to 'Show Summary', using the label name "Summary". When this checkbox is selected, a row will appear at the bottom of each data section within the report. This row will contain summary information based on the data from all columns associated to the data section. Within this window, the 'Summary Label' can be changed to any value specified.

3.2.5.2 Axis Aggregation

Axis aggregation allows column data to use the "Function" feature for specific data within the chart. For each of the available functions (Sum, Average, Median, Maximum, Minimum, and Count.), the data will be summarized at the bottom underneath that column of data. X-Axis data is always the top value and all remaining non-pivot Y-Axis columns will be listed underneath.

Note: Charts that contain pivots will create individual data section to display each pivot's values.

4 Dashboard Reporting

A dashboard report can be generated on any dashboard using out-of-the-box settings. However, iDashboards offers a variety of settings that allow users the ability to customize the appearance of each dashboard report. Dashboard reporting allows data from multiple charts to be reported on with a single click.

Changes made to the dashboard report properties are automatically saved with the dashboard when the edits are made. This allows all iDashboards users to leverage changes made to the report properties.

4.1 Accessing Dashboard Report Properties

To access the report properties window for dashboards, click on the Application Menu button at the bottom left of the iDashboards framework then select 'Dashboard Report Properties…' An alternate way to access the report properties window for dashboards is to right-click on the dashboard title bar and to select 'Dashboard Report Properties…'

When clicked, a **Dashboards Report Properties** window appears enabling the user to customize various aspects of the report including format, summaries, fonts and colors (see Figure 4-1).
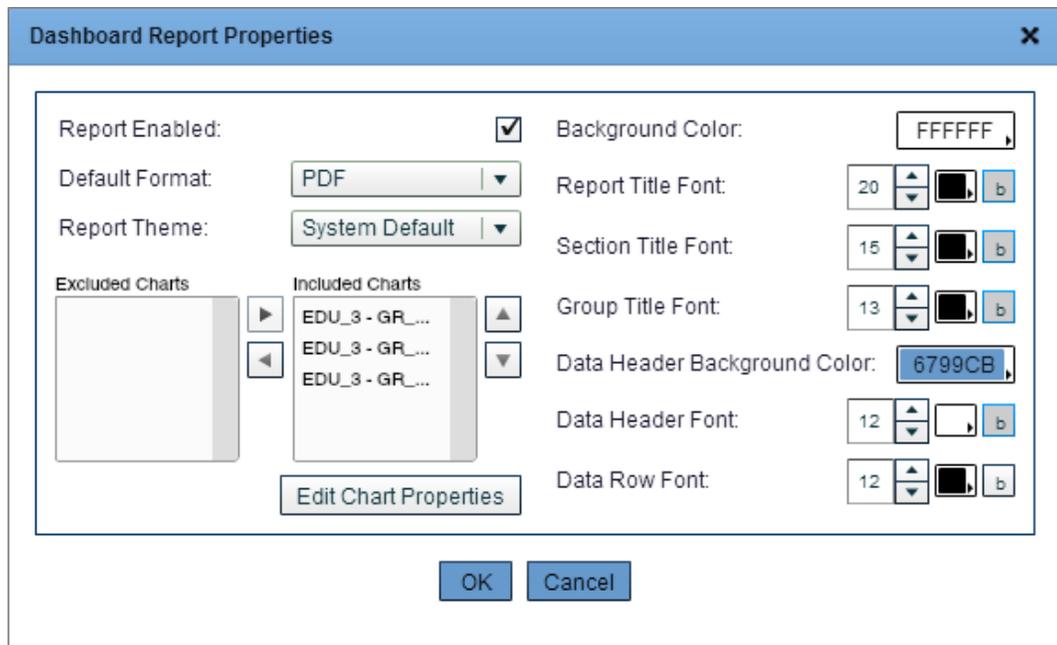

Figure 4-1

Note: Chart report properties will not use dashboard properties edited using this procedure. These settings are for generating reports on dashboards. See Chapter 3, "Chart Reporting" for more information on changing report settings for charts.

4.2 Dashboard Report Properties

4.2.1 Report Enabled

Reporting is an available function within all charts and dashboards. The 'Report Enabled' setting controls whether or not a dashboard is allowed to be turned into a report. If the checkbox is selected, a report can be run from this dashboard; this is the default setting. If the checkbox is cleared, a report cannot be run from this dashboard and a message will be displayed (see Figure 4-2).

Figure 4-2

4.2.2 Default Report Format

Based on the method used to run a report, this option will control the default output format. One-click options to generate a report will use the format selected in this setting. Other options to generate a report will allow this setting to be overridden.

4.2.3 Report Theme

As discussed in Chapter 5, "Reports Themes", themes can be applied to a dashboard to help quickly apply pre-defined values that adjust the visual settings within the report. There are three options for the Report Theme.

1. By default, this selection will be set to 'System Default'. This option will use settings defined by the system that cannot be altered.

2. Any changes made to the visual settings will cause the theme selection to change from 'System Default' to <blank>.

3. The other option is to select a pre-defined theme from the list. Themes are discussed in Chapter 5, "Reports Themes".

4.2.4 Visual Settings for Dashboards

The visual settings for a chart report can be entirely controlled in the **Dashboard Report Properties** window (see Figure 4-3). Users can begin editing each property from scratch, or start with selecting an existing theme as a template. Themes are discussed in Chapter 5, "Reports Themes".
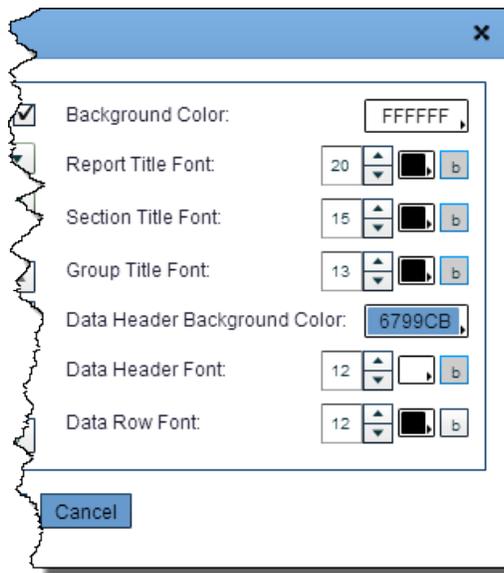
Figure 4-3

When editing the visual settings from this window, iDashboards will cause a warning window to appear. Accepting the warning will automatically adjust the theme to <blank>. This is normal behavior since the user has chosen not to use an existing theme or the system default. This message will always be displayed unless the 'Do not display this dialog again' checkbox is checked.

4.2.4.1   Details
Visual settings are used to control the appearance of a report.

For each item, there are three property types available for edit: Font Size, Font Color, and Bold-type. Each property type is organized into three columns as shown in Figure 4-4.
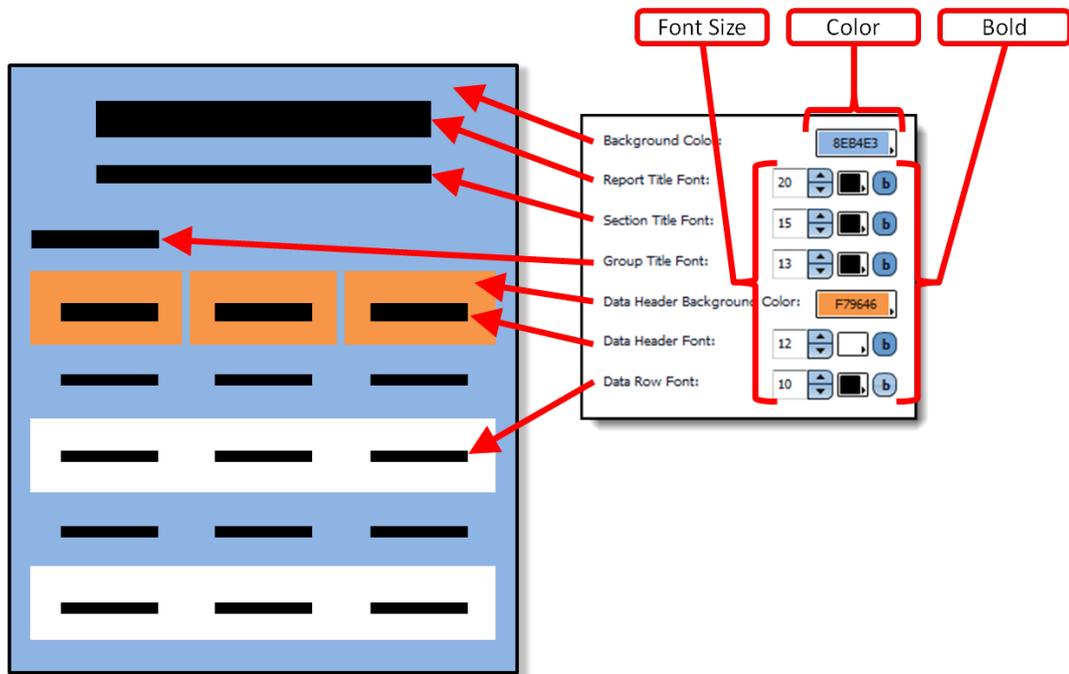
Figure 4-4

Within the chart visual settings, it is possible to edit the following items:

- **Background Color:** The color that is displayed behind the report. The iDashboards color picker will be displayed when clicked.

- **Report Title Font:** The size, color and bold-type of the font that will be displayed as the dashboard title. This title corresponds to the title displayed on the dashboard.

- **Section Title Font:** The size, color and bold-type of the font that will be displayed as the chart title. This title corresponds to the title displayed on individual charts.

- **Group Title Font:** The size, color and bold-type of the font that will be displayed as the sections of the chart. This title corresponds to the pivot values.

- **Data Header Background Color:** The color of the header of the data columns. This color will outline the header.

- **Data Header Font:** The size, color and bold-type of the font that will be displayed as the data columns. This header corresponds to the logical names given to the axes. Only displayed axes, both x- and y-, are displayed in the header.

- **Data Row Font:** The size, color and bold-type of the font that will be displayed as the chart data. This data corresponds to the data values displayed on the chart.

4.2.5   Chart Options

The appearance of chart data within the dashboard report can be altered with various settings (see Figure 4-5).
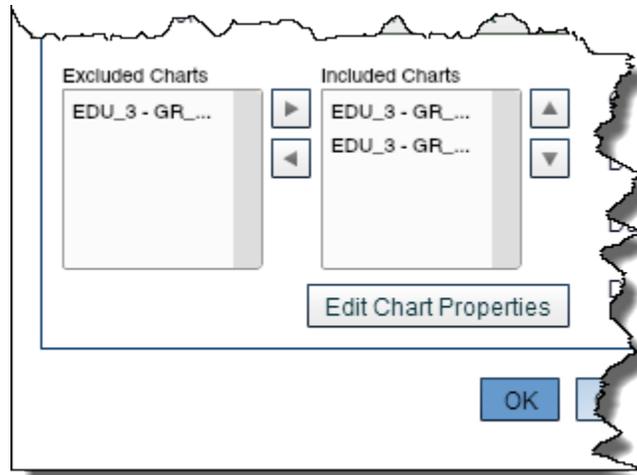

Figure 4-5

Note: Only charts become part of the report, no other frames (e.g. images, text) will be included in the report.

Note: Charts that contain pivots will create individual data section to display each pivot's values.

4.2.5.1   Excluded Charts / Included Charts

By default, all charts are included in the report. Any chart within the dashboard can be excluded from the report. To exclude a chart, highlight the chart name in the 'Included Charts' list box and click the left arrow button. To include a chart, highlight the chart name in the 'Excluded Charts' list box and click the right arrow button. The chart name, not the chart title, is displayed in the 'Excluded Charts' and 'Included Charts' list boxes.

4.2.5.2   Sort Order of Charts

It is possible to change the position of the chart data within the dashboard report. To change the sort order, highlight the chart name in the 'Included Charts' list box and use the up and down arrow buttons to position the order.

4.2.5.3   Edit Chart Properties

Characteristics of each chart can be edited specifically for the dashboard report. To access the settings, first select a chart from the 'Included Charts' list box and then select the "Edit Chart Properties**"** button. A **Chart Report Properties** window will be displayed (see Figure 4-6).

Through this window, changes made to the chart report properties are saved with the chart. When working with a chart that is used by multiple dashboards, changes made to a chart

from one dashboard will be reflected by another dashboard that contains the same chart. See Chapter 3, "Chart Reporting" for details specific to chart properties.
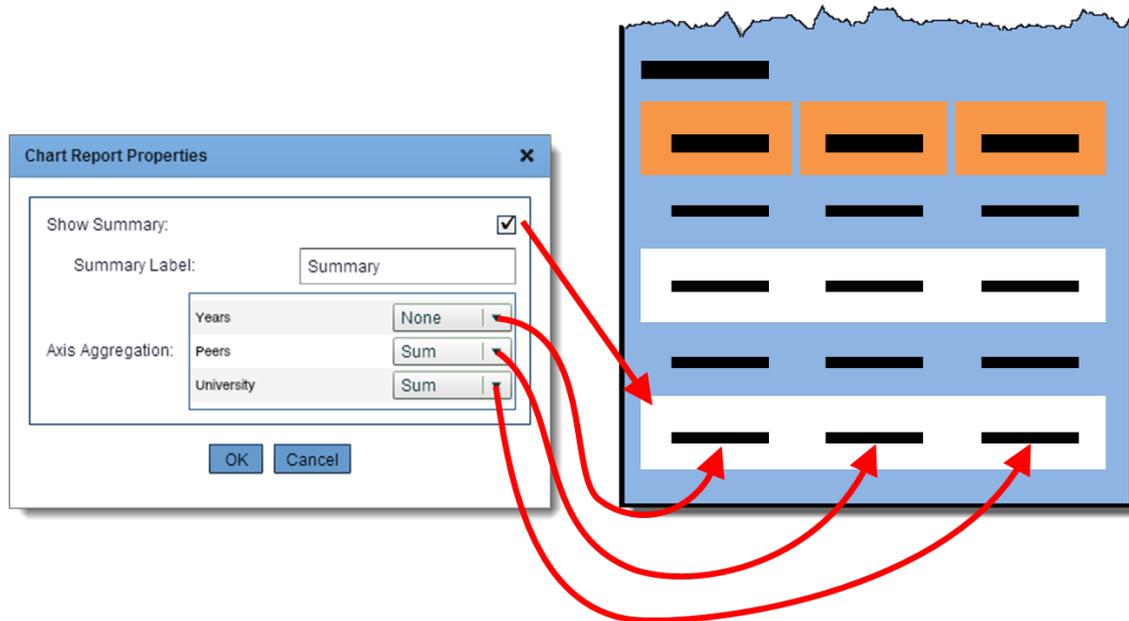

Figure 4-6

4.2.5.3.1 Show Summary

The default value for all charts is to 'Show Summary', using the label name "Summary". When this checkbox is selected, a row will appear at the bottom of each data section within the report. This row will contain summary information based on the data from all columns associated to the data section. Within this window, the 'Summary Label' can be changed to any value specified.

4.2.5.3.2 Axis Aggregation

Axis aggregation allows column data to use the "Function" feature for specific data within the chart. For each of the available functions (Sum, Average, Median, Maximum, Minimum, and Count.), the data will be summarized at the bottom underneath that column of data. X-Axis data is always the top value and all remaining non-pivot Y-Axis columns will be listed underneath.

5 Reports Themes

iDashboards Reports has themes that are used to save visual specific settings that control the appearance of a report. Multiple themes can be saved within iDashboards, which allow a variety of formatted reports to be generated without modifying individual settings before each use. Once a theme has been saved, it will be accessible to all users who are permitted to access themes. iDashboards will recognize each theme name when navigating both **Dashboard Report Properties** and **Chart Report Properties**.

To access the themes properties window, click on the Application Menu button at the bottom left of the iDashboards framework, then select 'Report Theme Editor…'

When clicked, a **Create/Edit a Report Theme** window appears (see Figure 5-1) enabling the user to customize various aspects of the report theme including format, summaries, fonts and colors.
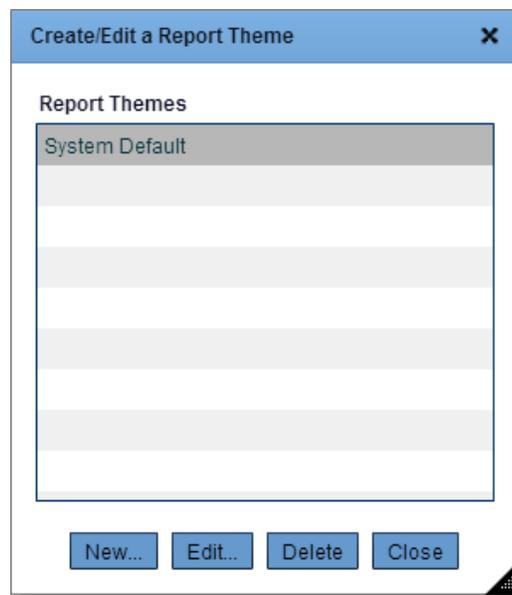
Figure 5-1

Each report theme requires a name during configuration, and each of those names will appear in the name list. Theme names cannot be duplicated. "System Default" is a template theme that has configurable options like any other theme. "System Default" is also the default theme for all chart and dashboard reports. This theme can be customized but not deleted. Changes made to this theme can affect the visual settings for both dashboard and chart reports.

Custom themes can be created here by clicking "New…" A theme can be edited by highlighting the theme and clicking "Edit…" A theme can be deleted by highlighting the

theme and clicking "Delete". If a theme has been associated with a chart or dashboard, the user will get a warning message when the theme is deleted. Close the Report Themes window by clicking the "Close" button.

5.1 New Themes

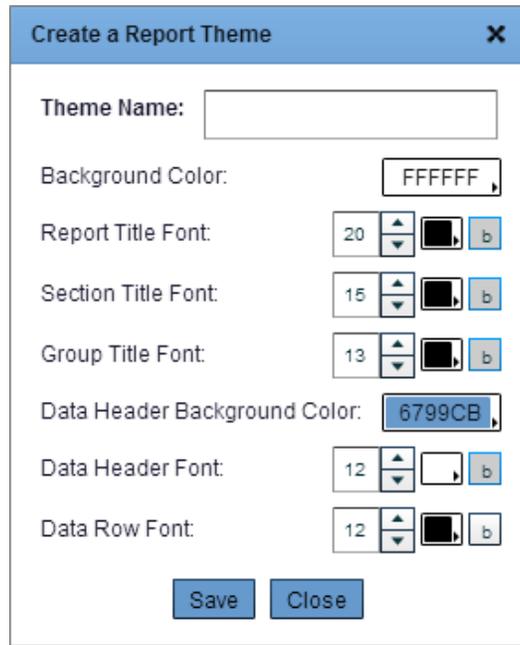Clicking "New..." will open the **Create a Report Theme** window (see Figure 5-2)

Figure 5-2

- **Theme Name** – A name needs to be applied to a theme in order to save it, if not an error message will be displayed.

5.1.1 Visual Settings for Themes

For each item, there are three property types available for edit: Font Size, Font Color, and Bold-type. Each property type is organized into three columns as shown in Figure 5-3.
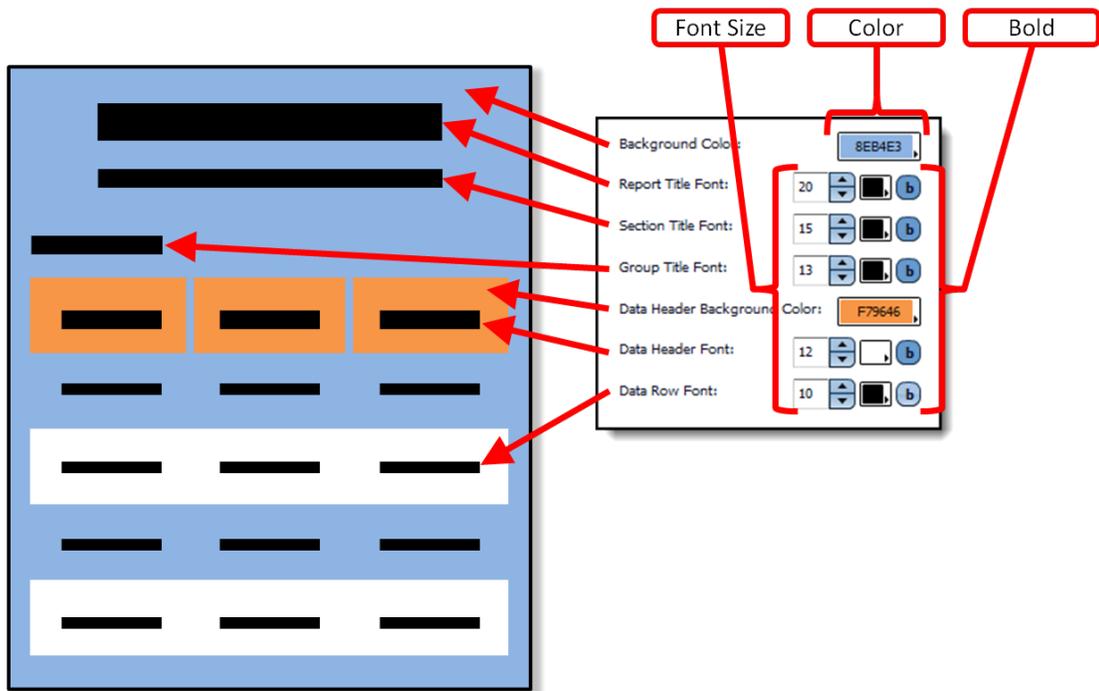
Figure 5-3

Within the chart visual settings, it is possible to edit the following items:

- **Background Color:** The color that is displayed behind the report. The iDashboards color picker will be displayed when clicked.

- **Report Title Font:** The size, color and bold-type of the font that will be displayed as the dashboard title. This title corresponds to the title displayed on the dashboard.

- **Section Title Font:** The size, color and bold-type of the font that will be displayed as the chart title. This title corresponds to the title displayed on individual charts.

- **Group Title Font:** The size, color and bold-type of the font that will be displayed as the sections of the chart. This title corresponds to the pivot values.

- **Data Header Background Color:** The color of the header of the data columns. This color will outline the header.

- **Data Header Font:** The size, color and bold-type of the font that will be displayed as the data columns. This header corresponds to the logical names given to the axes. Only displayed axes, both x- and y-, are displayed in the header.

- **Data Row Font:** The size, color and bold-type of the font that will be displayed as the chart data. This data corresponds to the data values displayed on the chart.

5.2 Theme Editing

Clicking "Edit…" will open the **Edit a Report Theme** window. You will have the same capability to make edits to the theme name and visual settings as if you are creating a new theme.

5.3 Deleting a Theme

Themes may be deleted. Open the **Create/Edit a Report Theme** window, highlight the theme you want to delete, and click the "Delete" button. You will not be prompted to confirm the deletion of the theme if the theme has not been associated with a chart or dashboard. If it has, you will get a warning message.

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