TRACELINK UNIVERSITY

Create and manage dashboards

Dashboards are used to bring together data from one or more reports into a single, consolidated view. Each dashboard element is based on a report, which defines the available data and ensures consistency across different visualizations such as tables and charts.

Dashboards support interactive analysis after the data loads. Filters and display settings can be adjusted to refine the view, and updates are reflected across all linked elements. Dashboards can also combine data from multiple process networks and applications, enabling a unified view for monitoring performance and identifying trends.

Dashboards includes both synchronous and scheduled reports. Scheduled reports display the latest generated dataset in the dashboard.

The Dashboard displays datasets based on the following scenarios:

- Latest dataset successful: The dashboard uses the latest successful dataset for the scheduled report.

- Latest dataset failed: The dashboard uses the previous successful dataset for

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the scheduled report.

- No dataset available: If no dataset is available, the dashboard displays the message "Latest dataset is not available."

This topic describes the steps required to create and modify dashboards.

For instructions on how to add a dashboard to a solution, see the Tracelink.com.

Copy a marketplace dashboard

The Marketplace catalog provides predefined dashboards for immediate use. These dashboard can be used to address common use cases without manual configuration.

Copy a dashboard

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Dashboards in the side menu.
4. Select the Marketplace catalog from the menu items.

   The screen refreshes and displays the dashboards in the main content area. By default, the page is sorted to include dasboards that are Released and with the latest version.

5. Select the Filter button to search for a dashboard.
6. In the Filters push panel, fill in Dashboard Name field to filter the results.
7. Select Apply.

   The Filters panel closes and the main content area displays the results. The applied filters appear above the results table in chips.

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8. Select the desired dashboard row in the search results table.

9. Select the Copy button on the Operations toolbar.

10. Select the Company option from the Catalog Type drop-down in the Copy push panel.

11. Enter a name in the New Dashboard Name field that clearly identifies the application and purpose.

12. Select Apply.

    The new dashboard is created in the Company catalog and opens in the Edit state.

Tips

- To remove a filter, select the Close button in the chip containing the filter.
- To remove all filters, select Clear All.
- A similar operation can be used to copy a Company Dashboard in either the Edit or Released state.

View all versions of a dashboard

Users can retrieve the latest version of an object or view all available versions of a specific object.

1. Select the Main Menu icon.

2. Select Reports and Dashboards.

3. Select Dashboards in the side menu.

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4. Select the Company catalog from the menu items.

   The screen refreshes and displays the query objects in the main content area.

5. Select the desired query object row in the search results table.

6. Click the Go To drop-down. Select the Navigate to Dashboard Version Search Page button.

   A new tab opens and displays the Company Dashboard Versions Search Page in the main content area.

Tips

- Review the object relationships or update them as needed. When finished, move the query object to the Released state so it can be used to create reports.
- To remove a filter, select the Close button in the chip containing the filter.
- To remove all filters, select Clear All.

Create a company dashboard

Create, configure, and release a dashboard

1. Select the Main Menu icon.

2. Select Reports and Dashboards.

3. Select Dashboards in the side menu.
4. Select the Company catalog from the Dashboards drop-down.
5. Select the New button.

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6. Fill in the following fields in the General section:
    - Dashboard Name field – Enter a dashboard name.
    - Description field – Enter a description (optional).
    - Catalog Type drop-down – By default, Company catalog is selected.
7. Select the Save button.

   A new dashboard and dashboard version are created in the Company catalog with the workflow state set to Edit. The Edit page for the dashboard is displayed.
8. Select the Section 1 object collector (dotted box).
9. Select the Drag and Drop Field  icon from the design toolbar.
10. Select the Report Type.
    - Sync: List of Edit and Released state reports will appear.
    - Scheduled: List of Released state reports will appear.
11. Drag a report from the list of available reports into the dashboard section.

    Wait for the report to load in the section.
12. Select the Chart  icon in the section toolbar.

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13. Select the Actions icon.

14. Select the Edit Chart icon.

15. Select a chart type (e.g. Table or Pie Chart).

16. Select the Save button.

    The dashboard displays the report using the selected visualization.

17. Select Move To under Released in the dashboard toolbar.

18. Select the Save button.

    The dashboard moves to the Released state and is available for use.

Tips

- Select the New button in the New Dashboard page to clear all entered values and reset the page while updating dashboard details.
- Remove the State: Released filter in the search results table to locate the newly created dashboard.
- Multiple reports can be added to a section based on the selected layout.
- Dashboard filters apply to all linked elements that share common fields.

 The Dashboard Filter section behaves differently depending on the report

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types included in the dashboard:

- Dashboards containing only Scheduled Reports: The Dashboard Filter section does not apply.

- Dashboards containing both Sync and Scheduled Reports: Changes to the Dashboard Filter section apply only to Sync Reports, not Scheduled Reports.

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