S N A P S H T

EXPLODE YOUR DATA

Getting Started Customising
Dashboards for Customers

Plus Software has been shortened to Plus within this training manual

Contents

Introduction

Snapshot is a Dashboard and Analytics reporting **platform** made specifically for mid-market ERP accounting and payroll solutions.

Its purpose is simple - to give customers the right **real time information about any area of their business to help make informed decisions.**

This Getting Started Customising Dashboards (Customers) allows you to further customise your own Dashboards. You will be able to

- Copy a Community Dashboard into your own Custom area;
- Change the layout with simple drag and drop functionality;
- Change graph types, titles;
- Add or change filters;
- Add Parameters;
- And even add in new Dashboard Items (or elements).

IMPORTANT

This manual covers the Customer version of Snapshot. Certain advanced functionality is only available within the Partner version of Snapshot. For example, Creating New Dashboards from different SQL sources is a Partner function. Enquire with your value-added reseller/dealer (VAR) or in Plus Software language, "Partners" or email support@plussoftsolution.com

Please also review the Getting Started Training Manual before progressing.

Initial Administration

This training assumes that Snapshot has been installed, **and linked** to the Accounting and/or Payroll business system.

As a reminder, you need to ensure the latest Dashboards are available, by clicking on Settings and then "Check for new dashboards" immediately after your installation and connection to your database.

BASIC Dashboard Customisation

Copying a Community Dashboard

Once installed, Snapshot trawls through your Accounting, Payroll or Business Data and delivers information to you and your team in a variety of Dashboards, within the Community Dashboard section.

However, Snapshot allows you to further customise Dashboards to suit your business. Great news indeed!

Do this by choosing a Community Dashboard, copying it, and saving this new Dashboard into your Custom Dashboard section.
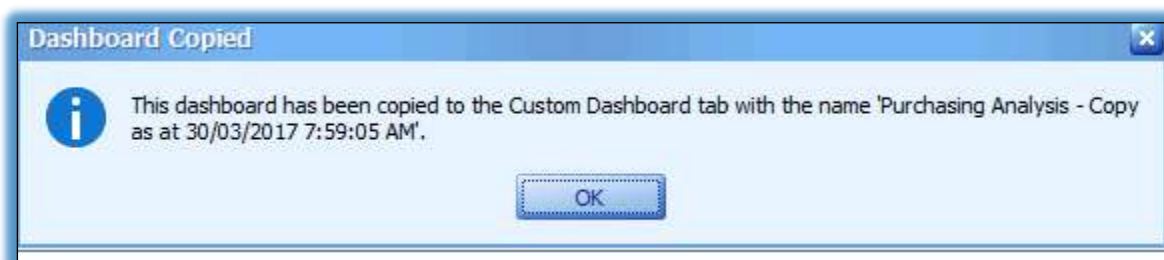
You can then begin to customise further.
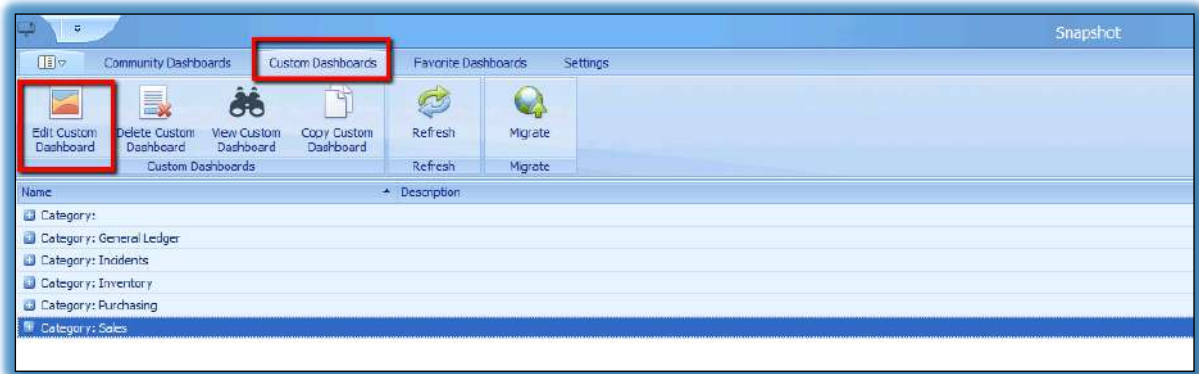
Let's look at how to do this:

1. Click on the Dashboard you would like to customise; then choose **Copy Dashboard**:
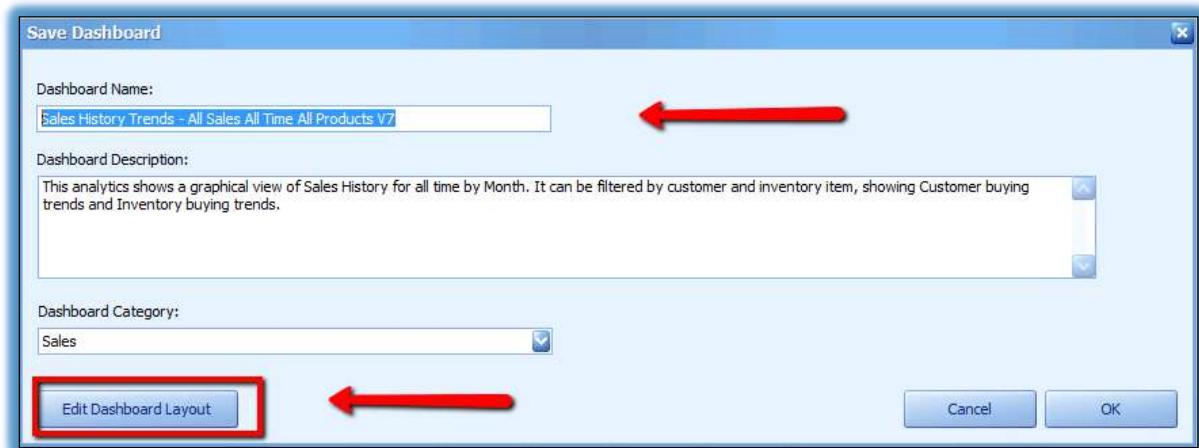

The following message will pop up:

2. Click on the Custom Dashboards menu item, and find the Dashboard you initially saved from the Community Dashboard section, then click **on Edit Custom** Dashboard:

3. Now rename the Dashboard, save to a category and then click on **Edit Dashboard Layout**

This will open the Dashboard Designer.

Introducing the Dashboard Designer

 Available (See Snapshot Website)

Before customising your Dashboard, it's useful to understand the **layout** and associated **functionality** of the Dashboard Designer, including the different sections of the Ribbon Bar (Home, Data and Design) as indicated below:
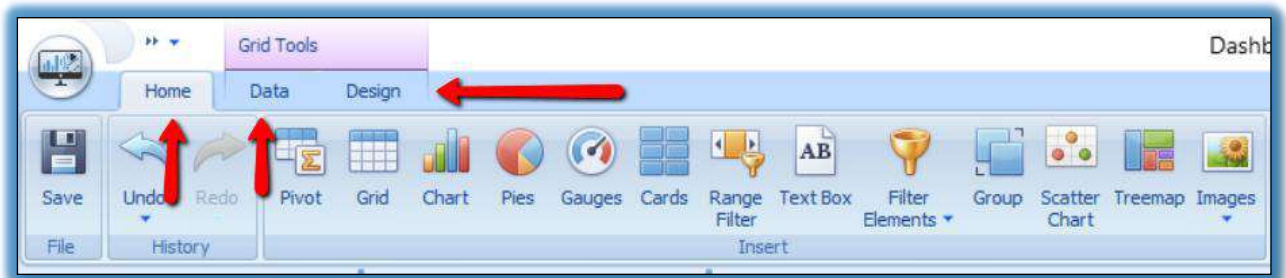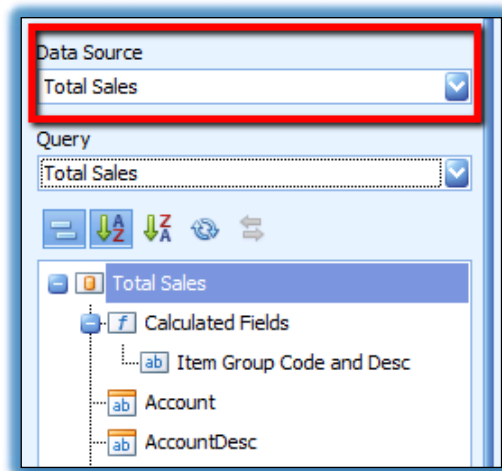

Let's run through the overall functionality of the Dashboard Designer. We've isolated the Designer into four key sections, as indicated below by the 4 sections below, in **Red**:

1. Data Source (including the section immediately below);
2. Data Items (and immediately below);
3. Dashboard Working Area (with the red frame);
4. The Ribbon Bar.
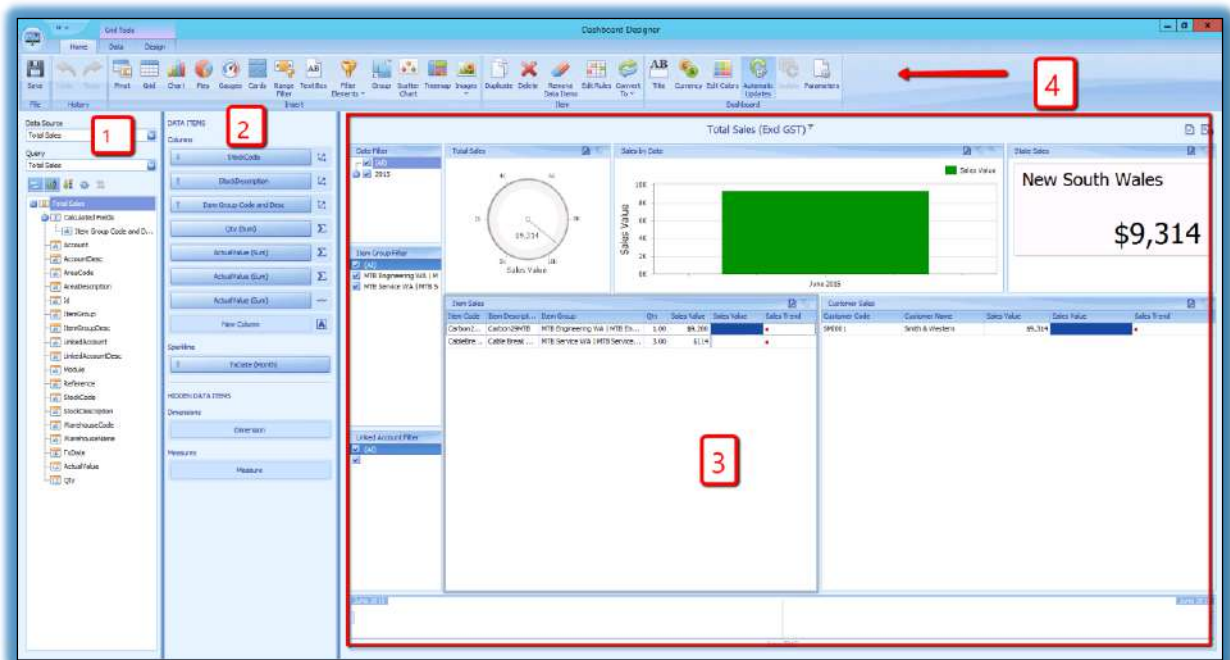
Data Source

A data source collects underlying data and passes it to a data engine that performs aggregation and summarisation, before data analysis.

Snapshot allows you to use **various data source types**, SQL databases, Excel and AML files, and even OLAP cubes.

The Data Source Browser allows you to navigate through dashboard data sources. It displays the data source structure.
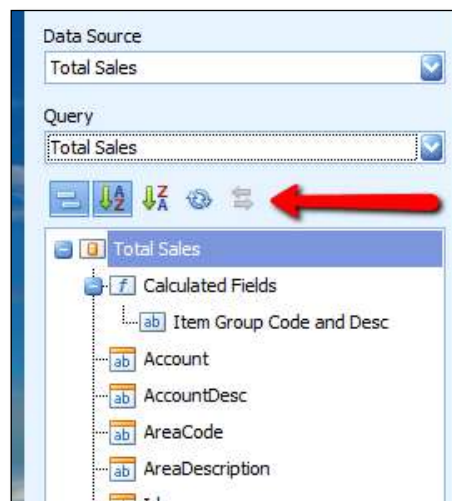
IMPORTANT

The connection to the data source has already been defined and cannot be changed in the Customer version of Snapshot – this is covered in the Partner version of Snapshot.

Please speak to your Partner or Plus Software for more information.

Query
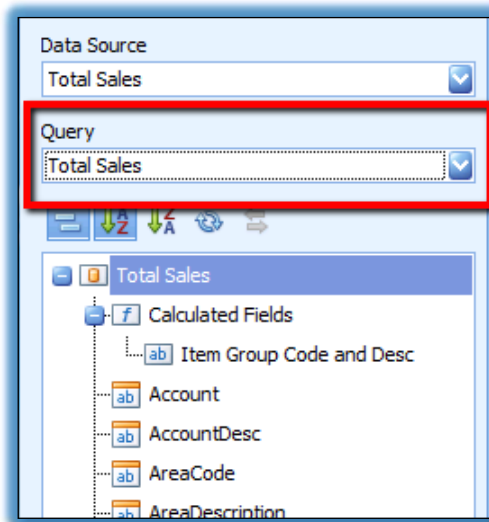
The Query allows you to select the required query or data member. The following Command buttons are available, as shown by the red arrow.

The ⬜ button groups fields by type.

The ↓A/Z and ↓Z/A buttons are used to switch the sort order.

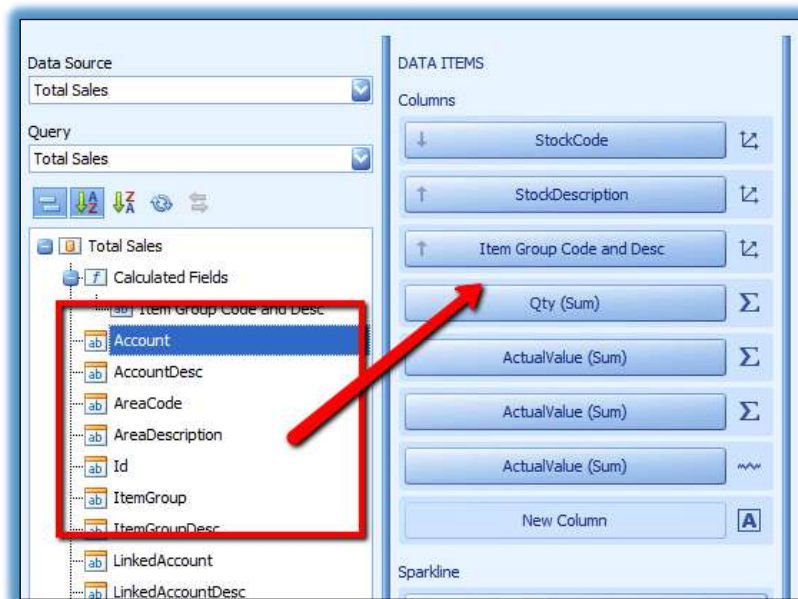The 🔄 button is used to refresh the Field List.

IMPORTANT

You cannot add additional queries in the Customer version of Snapshot but you can change and add Dashboard items using the existing queries.

Data Items

The Data Items pane allows you to create and modify data binding* using drag-and-drop operations from the Data Query table alongside.

Data binding is the process that establishes a connection between the application user interface and the business logic. If the binding has the correct settings and the data provides the proper notifications, then, when the data changes its value, the elements that are bound to the data reflect changes automatically. Refer to the chapter on Binding Data to your Dashboard Item for more information.

Dashboard Working Area

This is the area where you work with the layout and Dashboard Items (elements, or components) of your Custom Dashboard:
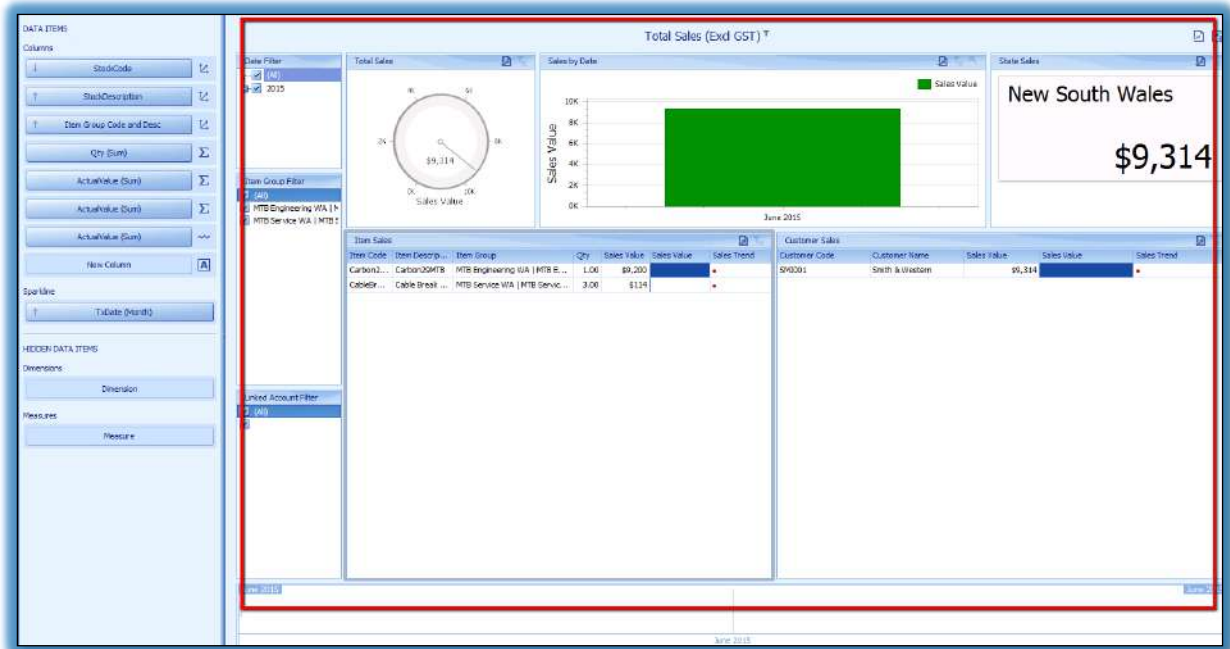
Ribbon Bar

The Ribbon bar offers you the tools to change, add and customise your Dashboard

TIP

You should use this Guide in conjunction with the Videos on the Plus Software website as the Ribbon Bar has different functionality depending on the Dashboard Item chosen.

This is sometimes easier to visualise in a video than in a training guide.

Changing the Layout of your Dashboard

 Available (See Snapshot Website)

Changing the layout of the Dashboard is easy.

Open a Dashboard in the Dashboard Designer.

In the example below, we'll use a Profit and Loss Dashboard

Let's move the **Detailed GL Transaction Dashboard Item** (**see red frame**) to *somewhere else* on the Dashboard.

1. Click on the **Detailed GL Transactions** Dashboard Item, in the top bar, with your **left** mouse button:

2. Drag the Dashboard Item to move to the **left** of the **Profit and Loss** Dashboard Item.

    A **black** bar will appear at the top to show the Dashboard item moving to above the **Profit and Loss** Dashboard Item:
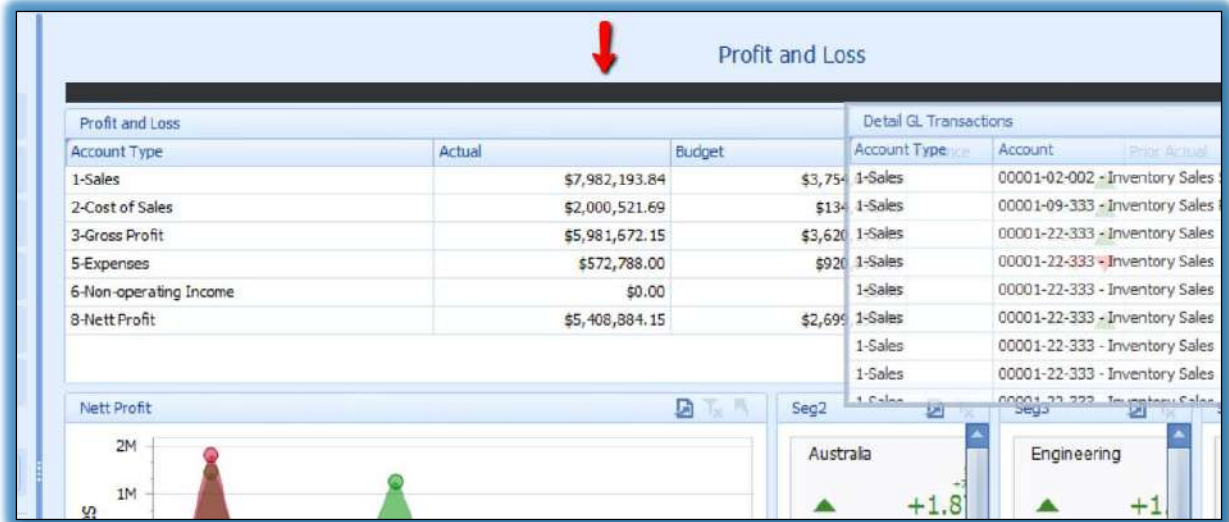
Alternatively, the **black** bar will show to the left, if moving the **Detail GL Transactions** Dashboard item *to the left* of the Profit and Loss:
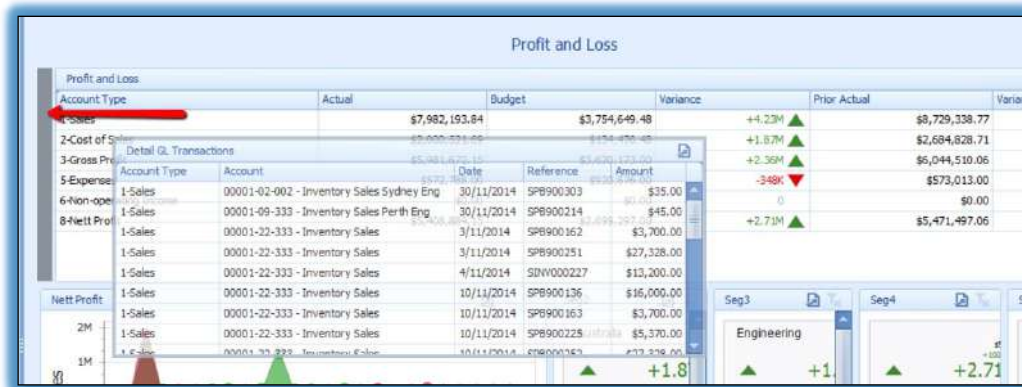
3. Release your mouse button once the Dashboard item is in the new position.
4. Press **Save** (top left hand corner of the Dashboard Designer).

TIP

At any time, you can click on the Undo button to start again:
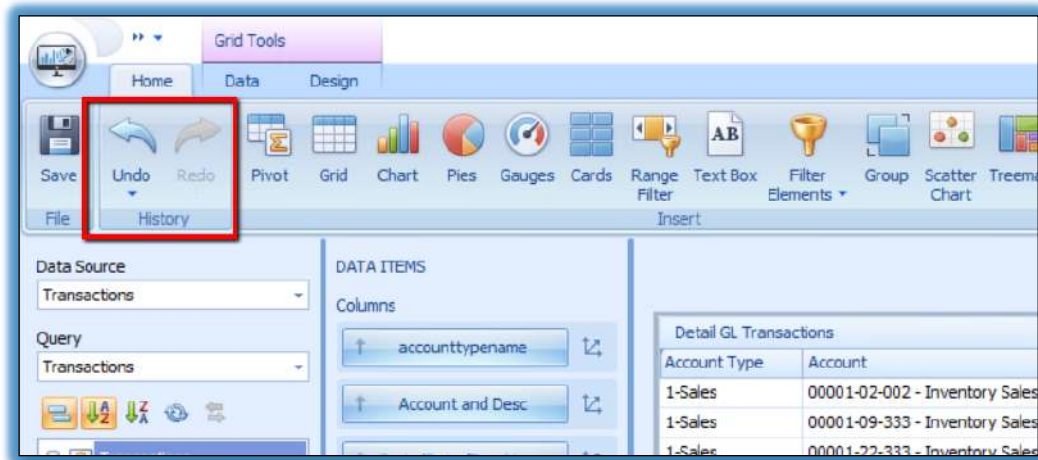
Making changes to an Existing Dashboard Item

 Available (See Snapshot Website)

Within your existing Custom Dashboard, you are able to **Duplicate**, **Delete**, **Remove Data Items**, **Edit Rules** (advanced functionality) and **Convert** to another type of Dashboard Item.

 IMPORTANT

The Menu bar changes depending on the Dashboard Item selected. The screen shot below shows the menu when selecting a Grid Tool.
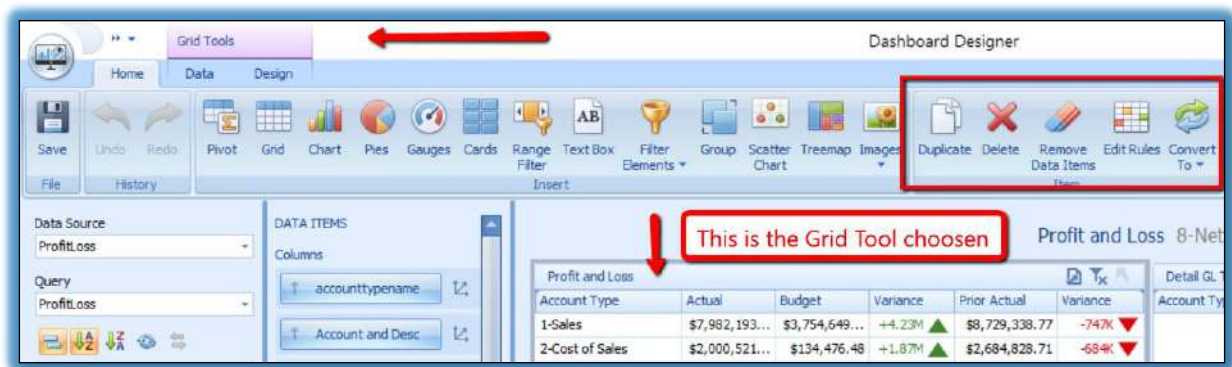
And here's the Menu when clicking on a Chart Dashboard Item (Chart Tool).
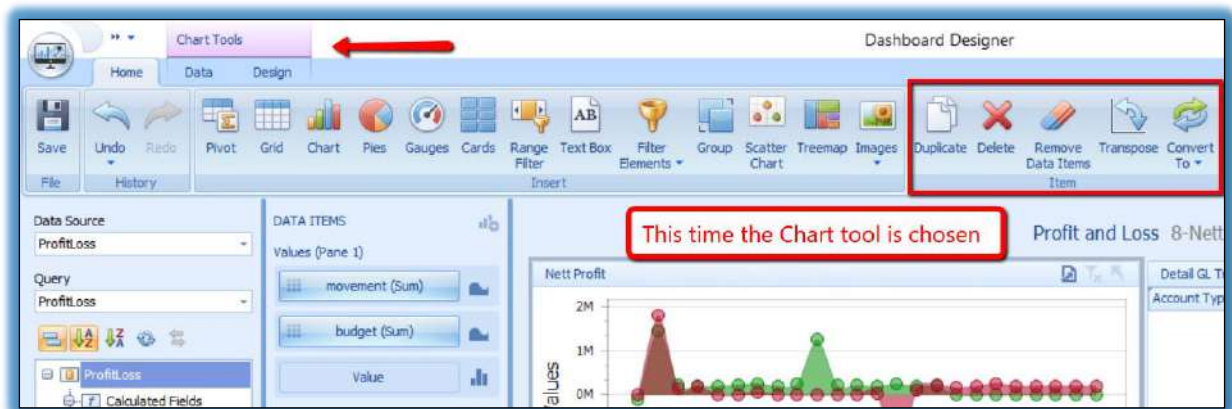
IMPORTANT (Yes, another one!)

There may be Dashboard items where the Menu item is greyed out – in other words this function is not relevant, or in some cases the entire Item Dashboard section may disappear.

Let's look at the Heading Explanations:
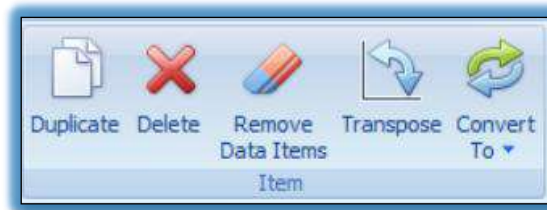
(Remember, there are additional icons visible depending on the Dashboard item chosen)

Duplicate

Clicking on a Dashboard Item will allow you to duplicate that Dashboard item.

Delete

As it says - this allows you to delete the Dashboard Item.

Remove Data Items

You can remove the bindings for the Dashboard Item.

Transpose

Only available in graphs and this swaps around your X and Y axis.

Edit Rules

Where you see Edit rules, you can set up conditional formatting to highlight fields or rows, change the text colour of fields or rows or   add icons to fields.
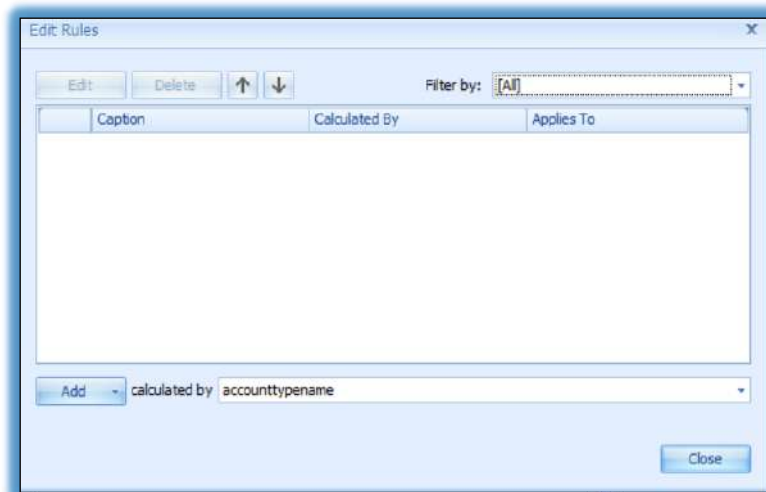
Convert to
Easily convert the Dashboard Item to something else, for example, from a Pie Chart to a Grid.

Tip

Right clicking on a Dashboard Item also shows the menu items:
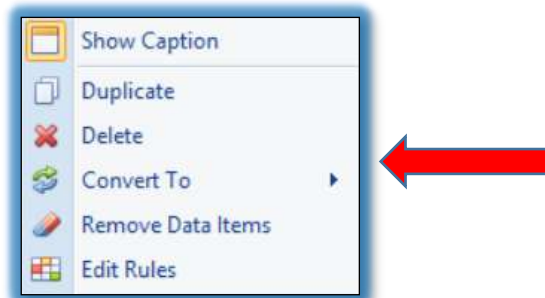
The **Convert To** side bar shows the following:
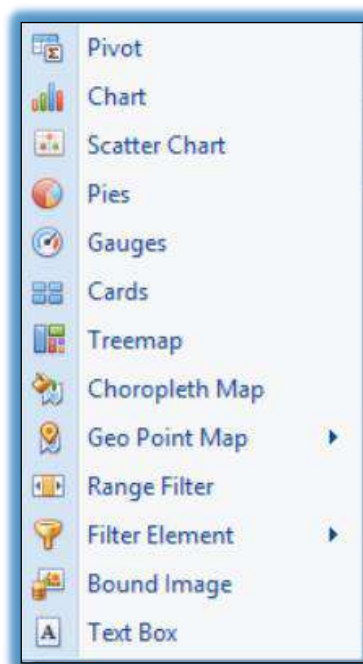
Changing Title, Currency, Parameters etc.

 Available (See Snapshot Website)

In terms of the Dashboard itself, you can change the following:

To make these changes, simply click on the icon above. For example, clicking on the Title icon will show this screenshot:
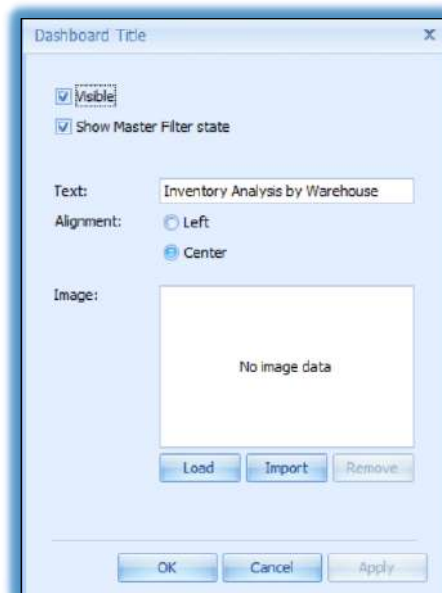
Make the change to the Dashboard title as required.

You can make similar changes for the currency and colours (or colors as our American friends spell the word).

Adding Automatic/Manual Updates to a Dashboard
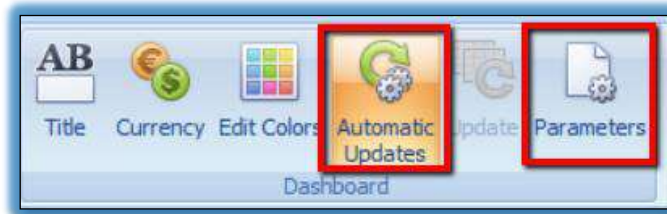
When you perform a data-aware operation in the Dashboard Designer the Dashboard sends a query to a data source and updates itself automatically according to the returned data.

If the dashboard is connected to a **large** data source, updating the Dashboard according to each change can take some time.

In this case, you can choose the **Automatic Updates** tab (or disable) on the Home Ribbon Tab.

You can also add Parameters to a Dashboard.

For example, clicking on the Parameters icon opens the following screen. Enter the information as per your Parameter needs:
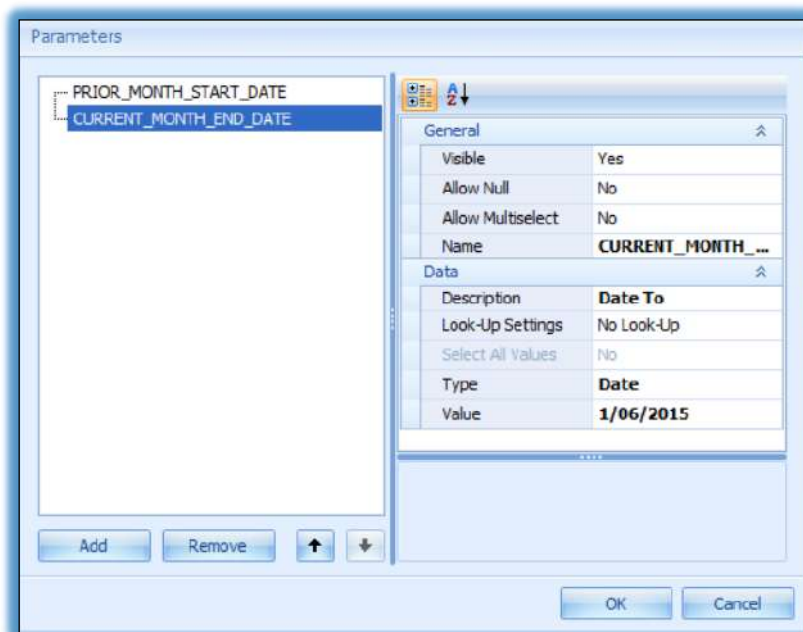
Once saved, your Dashboard will now need a Parameter input before executing.

Changing the Design of a Dashboard Item

The Design Ribbon Bar functionality

The Design section changes **extensively** depending on the Dashboard Item you choose.

For example, when you click on a **Gauge** Dashboard Item (within the Dashboard working area #3) the Design tools are different to what is available when you click on a **Chart** Dashboard Item.

To view what each icon does, hover your mouse over the icon.

If you require further help regarding the explanations, email us at support@PlusSoftSolutons.com

When clicking on the any of the Dashboard Items within a Dashboard, the Design functionality changes. Let's view them as they are shown on the **Home/Insert** Menu:
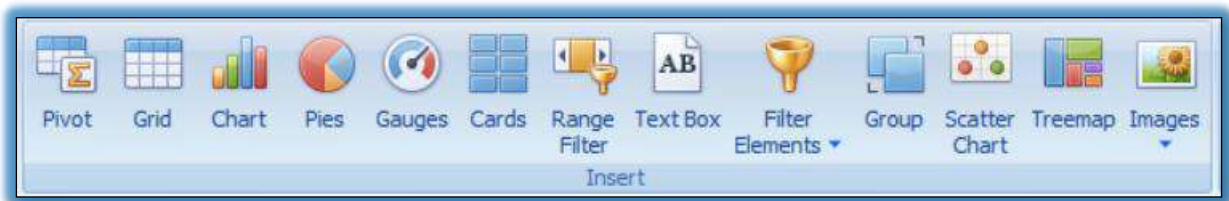
Pivot Tools

When inserting or selecting an existing Pivot Tool, the Design Toolbar shows the following functionality:
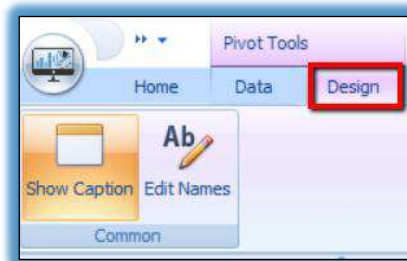
IMPORTANT

Hover your mouse over any icon to show the functionality explanation (below the Show Caption icon).
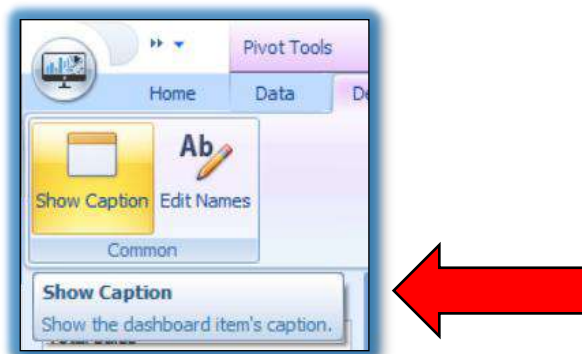
Grid Tools
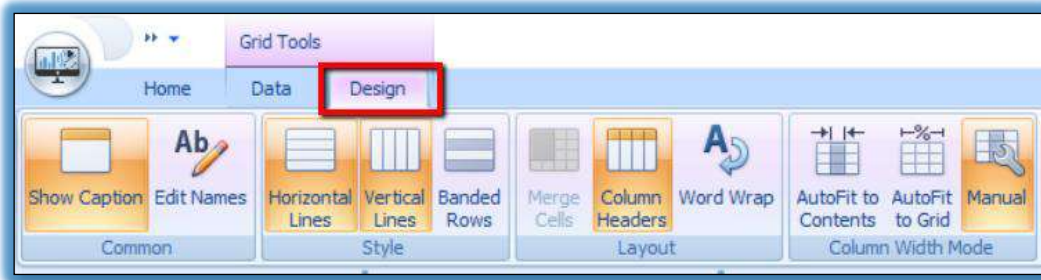
Once again, hover your mouse over any icon to show the explanation of what the design tool does.
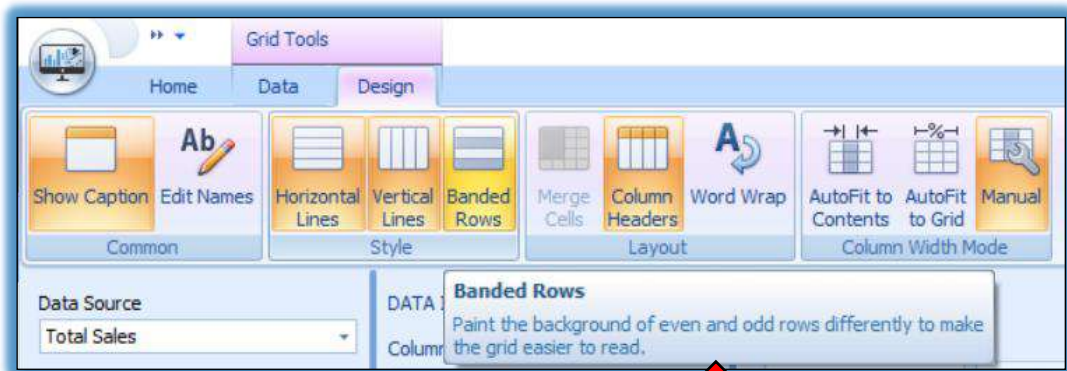
Chart Tools

Hovering your mouse over any icon will show the explanation of what the design tool does.

And further across the ribbon bar:
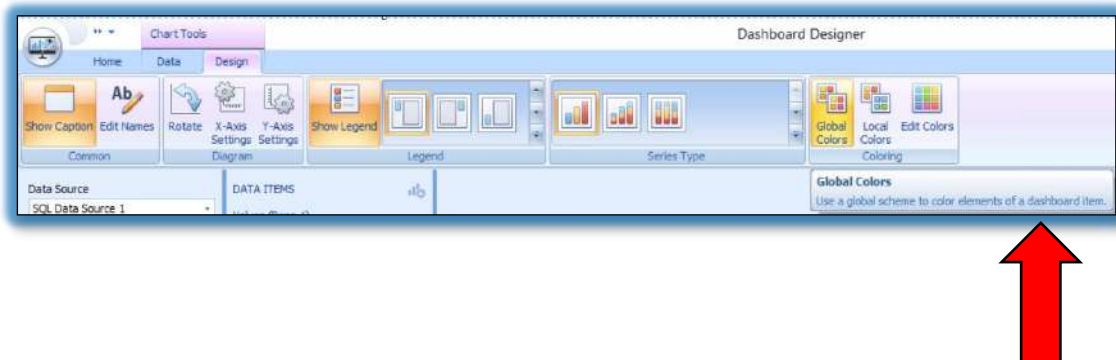
Pie Tools
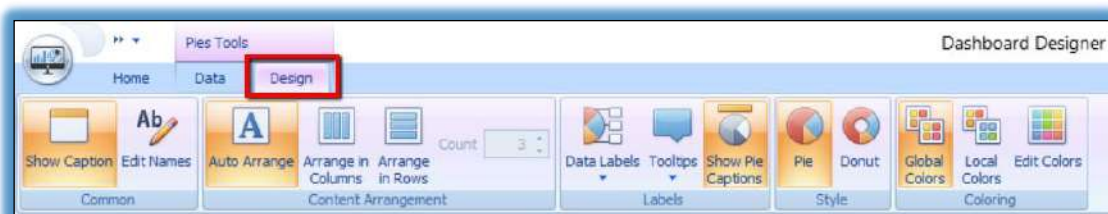
Gauge Tools

Card Tools
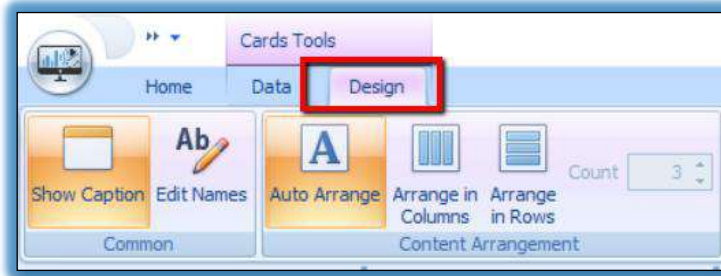
Range Filter
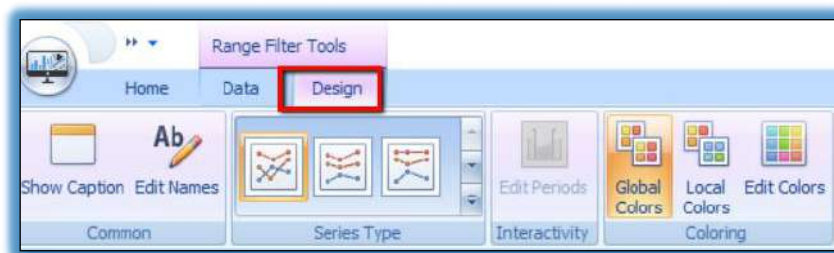
Text Box Tools

Filter Element Dashboard Item

Group Tools

Scatter Tools

Treemap Tools

Bound Image Tools
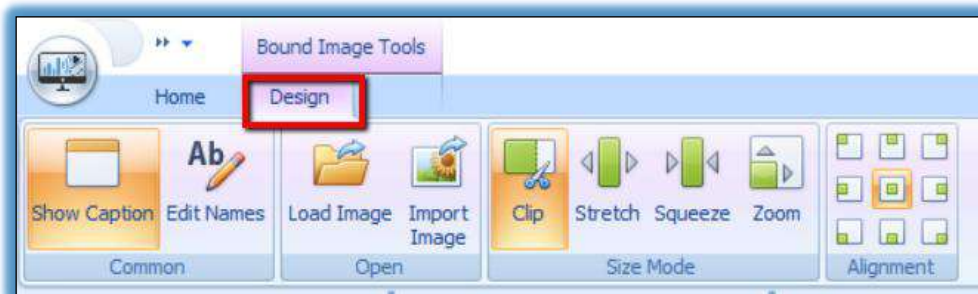
Remember to hover your mouse over any of the icons to reveal the functionality. Email support@plussoftsolutions.com for further assistance.

INTERMEDIATE Dashboard Customisation

Inserting new Dashboard Items

 Available (See Snapshot Website)

You have the ability to insert new Dashboard items into your existing Dashboard, using the Ribbon Bar under **Home/Insert.**

Using this ribbon component, you can insert **one or many** of these Dashboard items into the Dashboard. You can also change the existing Dashboard Item.

Clicking on an icon (shown above) will insert that particular Dashboard Item into the Dashboard.

From here you can move the Dashboard Item around in terms of the layout and then bind the data.

Icon Explanations (you can hover your house over the icon for an explanation):

Pivot

This displays a Cross Tabular Report. Use this to present multi- dimensional data in an easy to read fashion.

Grid

The Grid shows table in a table format, allowing you to summarise against specific measures or calculate differences between them.

Chart

Visualise data in an XY Diagram allowing you to view a wide range, from simple bar to financial Open-High-Low-Close graphs.

Pies

Display a variety of pies or donuts that represent the contribution of each value to a total.

Gauges

Display a variety of Gauges, communicating two values – one with a needle and the other with a marker on the scale.

Cards

Display a series of cards each illustrating the difference between two values, expressed in an absolute or percent variation.

Choropleth Map

Display a map which uses differences in shading, colouring, or the placing of symbols within predefined areas to indicate the average values of a particular quantity in those areas.

Range filter

The Range Filter allows you to apply filtering to other Dashboard items. Displays a chart with selection thumbs over it that allow you to filter out values displayed along the argument axis.

Text Box

Create a Text Box Dashboard item.

Geo Point Maps

This dashboard item allows you to place callouts on the map using geographical coordinates.

You can also insert a **Bubble Map** which allows you to place bubbles on the map. Each bubble can represent data via its weight and color;

Or insert a **Pie Map which** allows you to display pies on the map. Each pie visualizes the contribution of each value to the total.

Filter Elements

Apply filters to other Dashboard items. Include a Combo box or List Box or Tree View.

Group

Create a group that arranges Dashboard items and allows you to manage the interaction between Dashboard items within and outside the group.

Scatter Chart

Insert a Scatter chart.

Treemap

Insert a Treemap Dashboard Item.

Images

Create an image Dashboard item and insert an image or a Bound Image.

Once you have inserted a Dashboard Item, you need to connect the Data to the item.

This is referred to as "Binding your data."

Binding Data to your Dashboard Items

 Available (See Snapshot Website)

Once you've inserted the Dashboard item, you need to **bind* the data** *to that Dashboard Item.*

For example, in the All Sales Dashboard (Business Vendor dependent) let's add a Card showing the **Total Sales by Area**.

Note*:*

*There is a Dashboard Item (card) showing this data **already** within this Dashboard. However, this is a useful exercise to complete (insert Dashboard item and bind the data) because you can validate your outcome with the existing Dashboard item.*

Click on Home/Insert/Cards.

The following empty card will appear in your Dashboard:
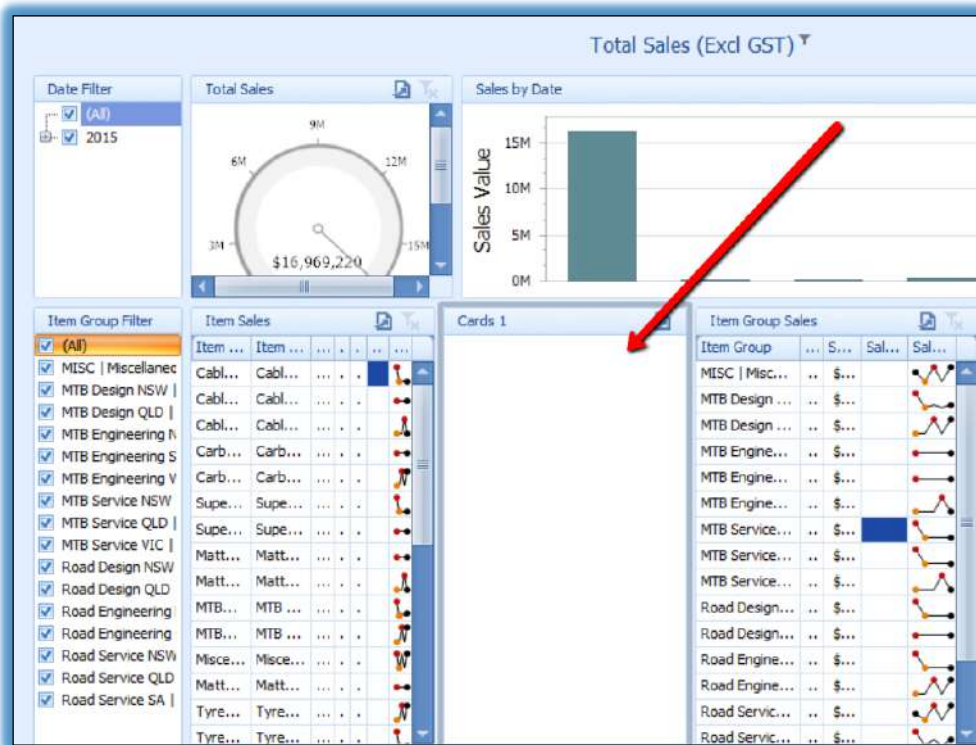
*   ***Data binding*** *is the process that establishes a connection between the application user interface and the business logic. If the binding has the correct settings and the data provides the proper notifications, then, when the data changes its value, the elements that are bound to the data reflect changes automatically.*

Let's now add in the **ActualValue** from the Data Source pane to the Data Item:
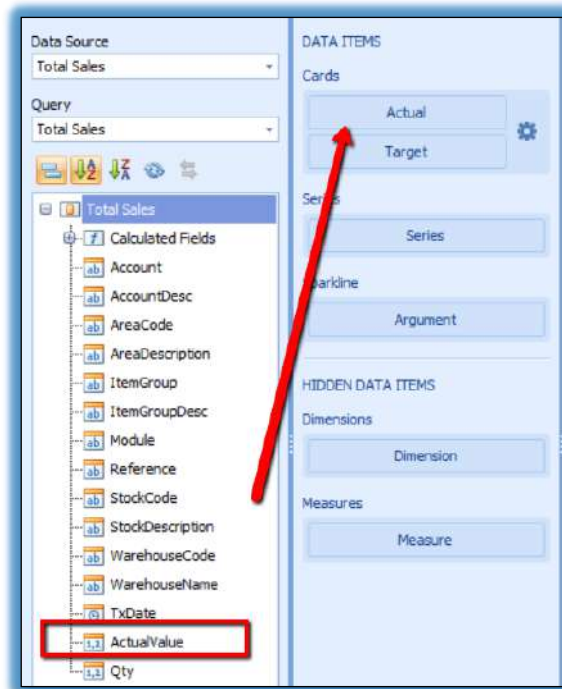
And then add the **AreaDescription** to the Series:
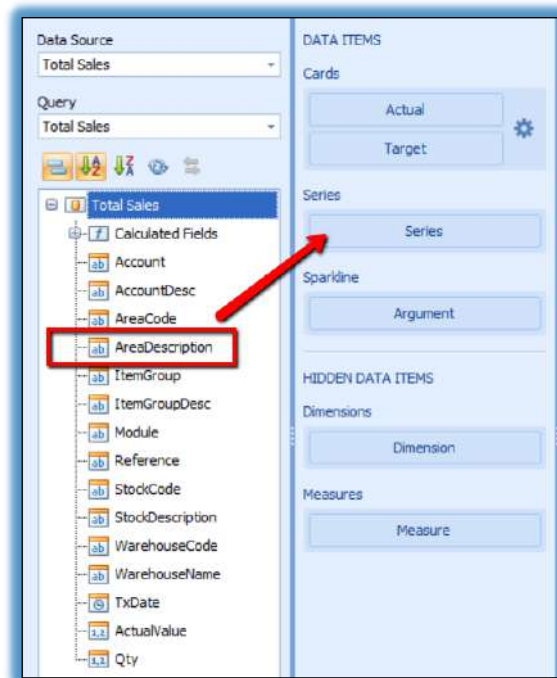
And there you have it. Your first Data Binding. Congratulations. Pizza on Friday night!

Working with Filters

Basic Filters

There are a number of Filtering Options for your Dashboard Items.

Clicking on the Data/Edit Filter icon will bring up the Filter Editor dialog:

 Use this dialog to build filter criteria using an easy tree-like interface.

IMPORTANT

The Data Source filtering (different to Dashboard Item filtering) is defined by your Partner or Plus Software – see Advanced Dashboard Customisation.

Example:

Clicking on a Dashboard Item (for example the **Inventory Analysis Dashboard item**, within the Inventory Analysis by Warehouse Dashboard (Business Vendor dependent)) and then the Data tab allows you to Edit Filters.

Click on Edit Filter:

This opens up the Filter Editor screen:
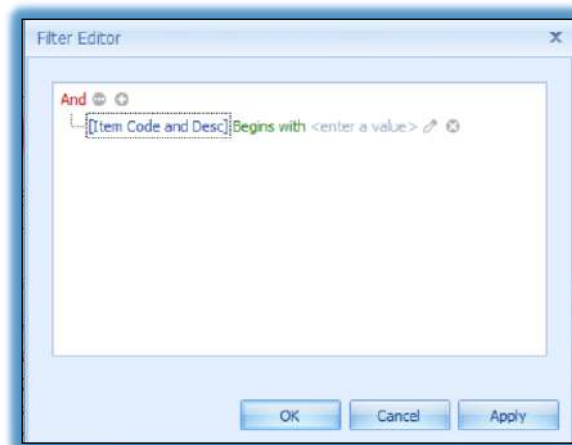
Use this dialog to build Filter criteria with the tree-like interface.

Tip

You can also right click on the data item to show the Edit Filter command.

The **Item Code and Desc** lists the Data Source Item.

If a Data Source item is not visible, you can drag the Field name from the Data Source into the Hidden Dimensions tab and it will then be available in the pull-down list.

The **Begins with** is the Operator with an extensive list of options:
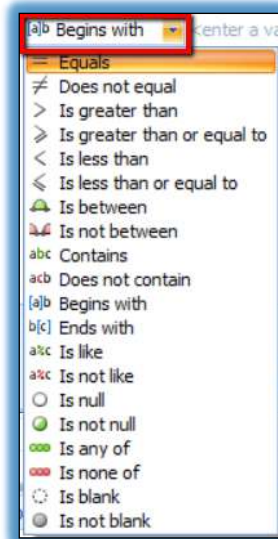
The <enter a value> represents the value of the column.

You can add a number of filtering options per Dashboard Item.

Clear Filtering

To clear filtering, select the Dashboard Item and click the Clear button.

Note: View the videos on the website for further information.

When you select multiple elements in the Dashboard, other Dashboard items will only show data corresponding to elements you have selected.

Multiple Master Filter

These are set per Dashboard component. When applying the Multiple Master Filter to a component it will filter all other Dashboard components. The filter can be removed by clicking on the cancel filter button at the top right.

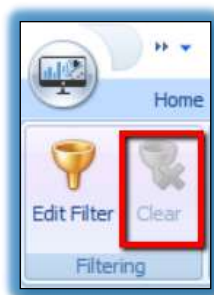When the filter is canceled, you will see all the information in the other components again.

Single Master Filter

This operates exactly the same as the Multiple Master Filter except that you can't cancel the filter. *It always filters the other components*.

Drill Down

Click an element in the Dashboard to drill down (i.e. show detailed information).

Cross Data-Source Filtering

When different items in a dashboard are bound to different data sources, you can specify that a particular Master Filter should be applied across data sources. This means that it will apply filtering to fields with matching names in all data sources.

To enable filtering across data sources, use this **Cross-Data-Source Filtering** button.

Ignore Master Filters

When this is selected for a dashboard component then it will ignore the filter coming from another component if it has single or multiple master filter activated.

ADVANCED Dashboard Customisation

There's an enormous amount of functionality within Snapshot and the Snapshot Dashboard Designer, depending on your level of expertise.

Most of this functionality is allowed in the Partner version of Snapshot but some of it is available to you as a customer, in the Customer version of Snapshot.

The training and explanation for most advanced functionality is beyond the scope of **this Getting Started Customising Dashboards** manual – instead we have listed the available functionality - please enquire with your Partner or with Plus for further assistance. Here are some options:

Creating new Dashboards

Snapshot allows you to create completely new Dashboards, from any source including from pretty much any SQL solution in the market

Data Source Filtering

You can filter data at the Data source level, as opposed to the Dashboard Item level. This approach is recommended when dealing with comparatively large data sources when the retrieval process is slow.

Conditional Formatting

Snapshot allows you to format dashboard item elements whose values meet a specified condition. This feature allows you to highlight specific elements using a predefined set of rules.

Advanced Analytics

You can perform advanced data analysis using calculated fields, aggregate and window functions, dashboard parameters, etc.

1. **Calculated Fields** allow you to apply complex expressions to data fields.
2. **Window calculations** provide the capability to apply specific calculations to measure values and allow you to perform different analytics tasks, such as calculating running totals, percentages of totals, differences etc.
3. **Parameters** are dynamic values that can replace constants in Filter Strings, calculated fields, conditional formatting expressions etc.

You can highlight Grid Cells whose values exceed the current Parameter value

Other Tips

Right clicking on a Ribbon Bar will allow you to add an item to the Quick Access Toolbar

Notes page

Scribble and doodle on this page if your trainer bores you. ☺

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