Dash

Interact
Add
Edit
eXcerpts
Dash - Interact

A Dash is an interactive, highly customizable dashboard for at-a-glance updates on key metrics.

Double click a Dash icon to view and interact with the dashboard.
Dash - Interact

Click the Play Briefing for an audio visual description of the elements of the Dash.
Dash - Interact

Click on any element of the Dash to interact as you would with a DataBook
Dash - Add

To add a new Dash layout, click the button in the center of the Dash panel.

You can also create a new Dash from the menu bar of the eThority home page by clicking Configure / Data Architecture / Create a Dash.
Dash - Add

Click **Add Element** to add an eXcerpt from the Element Catalog dialog box. See Dash eXcerpt for information on adding a new eXcerpt to the catalog.
Dash - Add

There are several ways to find your eXcerpt. You can use the Quick Filter in upper left to limit your selection to a specific type or types of eXcerpt. You can use the Search feature in the upper right or you can filter by Keyword in the lower left.

Select one or more eXcerpt types from which to choose.

Click the Filter by Keyword check box and select a keyword.

Enter a search value and click Go. The grid will be limited to eXcerpts containing the search value in any column.
Dash - Add

Select an element in the catalog and click the **Preview** button to verify your selection before adding it to the Dash.
Dash - Add

Select your element from the catalog and click **OK**. The first element is added to the panel. Click **Add Element** again to continue adding new eXcerpts to your Dash.

When adding multiple Alert Metrics you are given the option to keep all metrics on a single panel or create a new panel.
Dash – Edit

To edit your Dash, click the **Edit** button in the upper right of your Dash panel. To edit the properties of an element within your Dash, click on the element and then the **Edit Element** button. When your changes are complete, click the **Save** button.

Set properties specific to each type of element
Dash - Edit

For Alert Metrics, the Properties dialog box allows you to specify the details of the alert.

**Min / Max:** Set the minimum and maximum limits of the alert.

**Trigger:** In each trigger field enter the limit considered appropriate for the level of alert.

**Color Box:** Change the color progression.

**Show Alert:** Click to display Color Alert circle.

Scroll to edit Trigger properties.
Dash - Save

To save your Dash, click the Dashboard Properties button. Click the Sharing button to determine who will have access to this Dash.

**REMEMBER** It is only the shaping and format of the Dash that is shared. The content is based on the user rights – organizationally and through assignment of roles.

**Name:** Enter the Dash name to be displayed in the Library.

**Description:** Include a brief summary of your Dash in this field if desired.

**Global:** The Dash will be available to all eThority users.

**Department:** Specify an area within the organizational structure to have access to this Dash.

**User:** Select specific users or groups of users who can access to this Dash.
Keywords allows you to assign keywords to your Dash for use in future searches. Double click on a keyword from the dictionary or highlight and click the Add button.

To add a new keyword, click **New Keyword** button.

The Keywords dialog is displayed. Click **Add** and enter your new keyword and description. Click **Save**.

Your new keyword is now an option in the Keyword Dictionary.
Click the **Author/Notes** button to add comments pertaining to this version of the Dash. Share specific details of the Dash to share with other users.

Add a date to your notes by clicking the **Data Stamp** button. This will provide context for your comment, particularly in a Dash where the data is updated frequently.
Create your graph. From the File menu option, click Create Graph eXcerpt. Enter the name and description of the eXcerpt. Select Sharing options, Keywords and enter Notes as needed.
Create your DataBook. From the File menu option, click Create Table eXcerpt. Enter the name and description of the eXcerpt. Select Sharing options, Keywords and enter Notes as needed.
To create a Metric Alert, first create a DataBook with at least one group and apply a Measure to one or more columns. Right click a row in the column for which you would like an alert. Click **Create Metric eXcerpt** to open the Create Metric eXcerpt dialog.
Dash – Metric Alert

**Min / Max:** Set the minimum and maximum limits of the alert.

**Color Box:** Change the color progression.

**Show Alert:** Click to display Color Alert circle.

Scroll to enter the **Trigger** properties.

**Value:** For each trigger, enter the limit considered appropriate for the level of alert.

**eXpression:** Create a calculation on which to base the trigger value.

**When:** From the dropdown select Falls Below Trigger, Passes Trigger or Exceeds Trigger as appropriate.

**Send e-mail:** Check to have an e-mail automatically sent to the address in the **To** field when a trigger has been met.