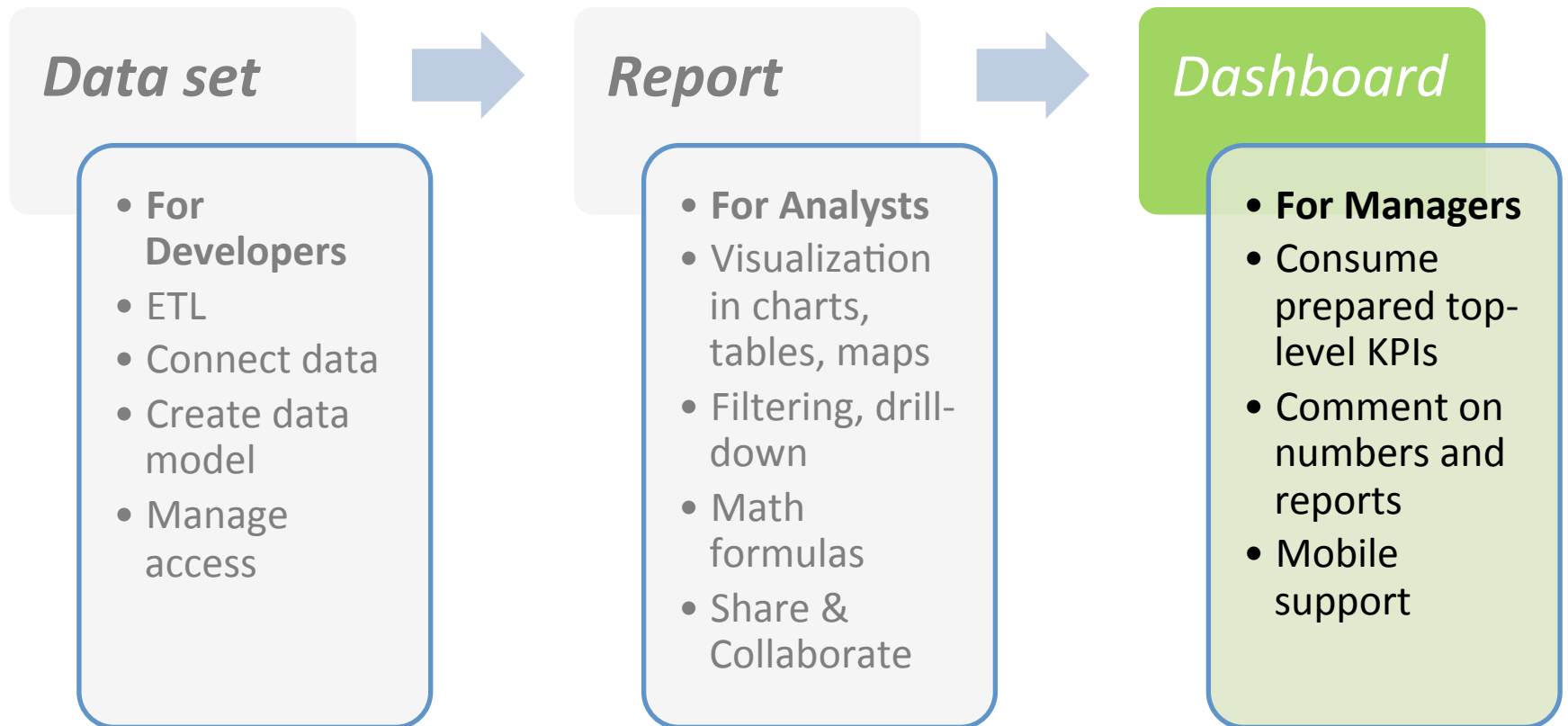


# BellaDati Training - Dashboards



# Basic concept



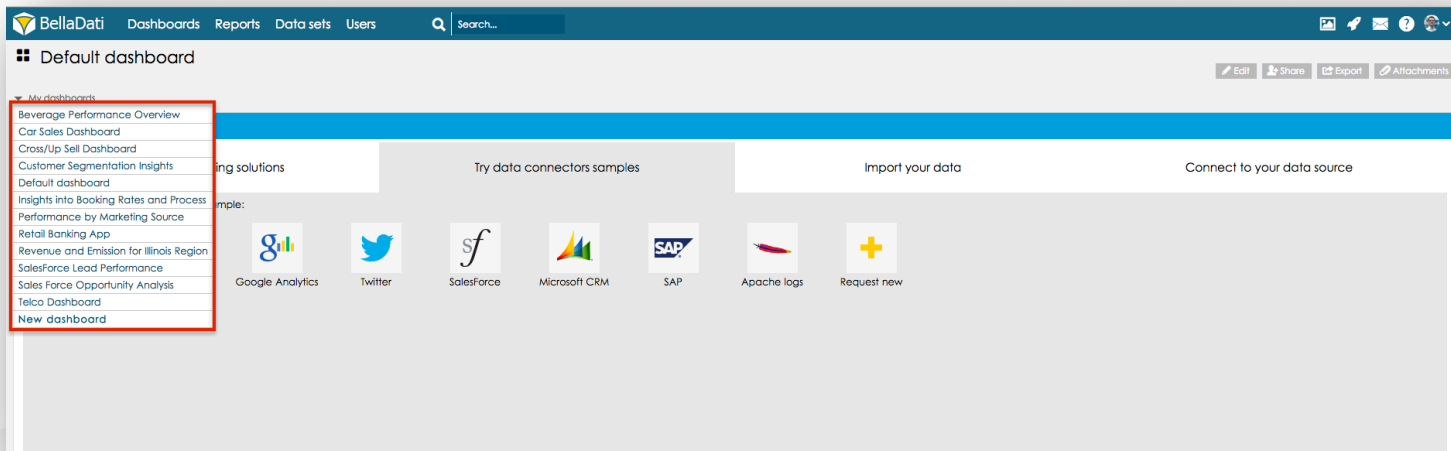
# Content

## Dashboards

- using dashboards
- basic dashboard controls
- managing layout, layout controls
- sharing and collaboration
- adding report views dashlet
- navigation dashlets
- displaying filter results
- other content dashlets
- searching dashboard

# Using dashboard

- consists of dashlets
- is designed for managers and executives, who need brief overview
- is used also by analysts and developers for navigation and tracking of changes
- user can have multiple dashboards
- creating is allowed to all users
- can be created by template



The screenshot displays the BellaData dashboard interface. At the top, there is a navigation bar with the BellaData logo and menu items: Dashboards, Reports, Data sets, and Users. A search bar is also present. Below the navigation bar, the main content area is titled "Default dashboard". On the left side, a "My dashboards" dropdown menu is open, listing various dashboard options such as "Beverage Performance Overview", "Car Sales Dashboard", "Cross/Up Sell Dashboard", "Customer Segmentation Insights", "Default dashboard", "Insights into Booking Rates and Process", "Performance by Marketing Source", "Retail Banking App", "Revenue and Emission for Illinois Region", "SalesForce Lead Performance", "Sales Force Opportunity Analysis", "Telco Dashboard", and "New dashboard". The main dashboard area features a "Try data connectors samples" section with a "Connect to your data source" button. Below this, there are several data connector icons: Google Analytics, Twitter, Salesforce, Microsoft CRM, SAP, Apache logs, and a "Request new" button.

# Dashlet types

## Report view

- from various reports

## Navigation

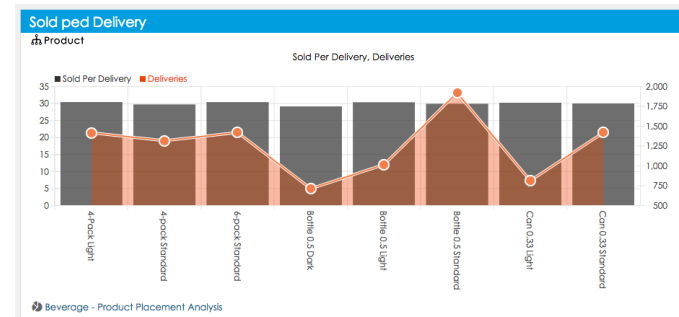
- owned, shared and most used reports

## Filter

- saved filter results

## Other content

- RSS
- Custom HTML
- News
- Sample data
- Tutorials



**Owned reports**

Name	Product	Last changed by	Last changed
Purchases Made for Selected Customer	Product	Radek Micka2	on November 21, 2014 6:03:41 PM CET
ID2. Upsell Combinations for Selected Product	F_Orders_Add_Product_Detail	Radek Micka2	on November 21, 2014 6:03:41 PM CET
4. Cross Sell Product Combination @_PRODUCT_NAME	F_Orders_Add_Product_Detail	Radek Micka2	on November 21, 2014 6:03:41 PM CET

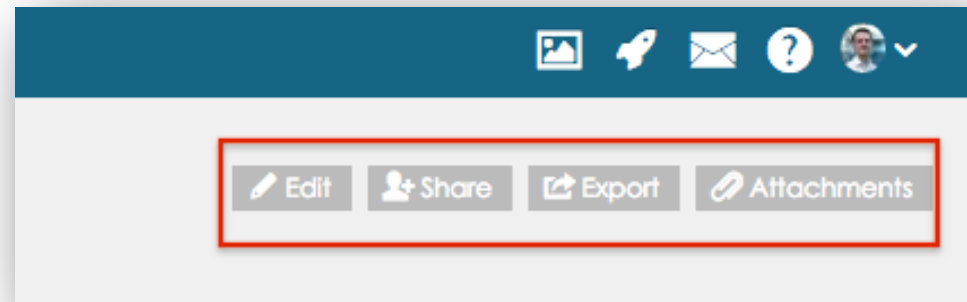
**Activity Stream**

Today

- change in report 1.2. Salesforce Product Report Radek Micka2 8:39 PM
- change in report 1.2. Salesforce Product Report Radek Micka2 8:38 PM
- change in report 2. Flight Analysis Radek Micka2 8:31 PM
- change in report 1. Booking Process Insights Radek Micka2 8:28 PM
- change in report 1.2. Salesforce Product Report Radek Micka2 7:29 PM
- change in report 1.3. Salesforce Lead Sources Performance Radek Micka2 6:54 PM

# Basic dashboard controls

- **List of owned and shared dashboards**
- **Edit mode to manage the layout**
- **Sharing**
  - with other users – in read-only mode only
  - public access – without login
    - only report view dashlets and custom content is displayed
- **Export**
  - Export to PDF, PPT and XLS
  - Send as email
- **Attachments**



# Dashlets common features

- **Changing name**
- **Adding description before and after content**
- **Custom titles colors**
- **Managing position**
  - Splitting dashlets
  - Enlarging dashlets
  - Adding new rows
  - Clear and remove

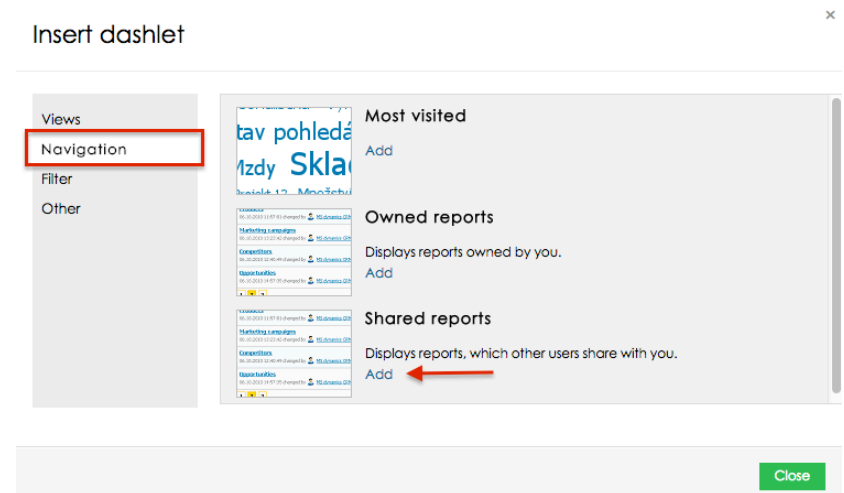
# Adding report views

- **add from reports**
  - using the publishing function
  - publish on multiple dashboards at once
- **directly from dashboard**
  - by selecting the desired view
- **at least read-only access is needed**
  - view will not be available after revoking access
  - data level filters are applied to all views
- **direct link to the report**



# Navigation & filter dashlets

- **Searching dashboard – same as the reports**
  - from the search page
  - or using the quick search in the main menu
- **Get the overview of reports:**
  - Most visited reports
  - Owned reports
  - Shared reports
- **Display the filter results**



# Other content dashlets

- **Another types of dashlets:**
  - **News:** Dashlet displays recent changes in the data
  - **Custom content:** Displays custom content - styled text, videos, pictures or HTML code
    - Custom navigation to the reports (URL)
  - **RSS feed:** Displays posts from custom RSS source
  - Help and tutorials dashlet
  - Begin with BellaDati: sample data

# Documentation

- Visit the documentation at

<http://support.belladati.com>

# Q&A

