

Creating an Adhoc Dashboard

The following section walks you through creating an example dashboard.

For a video tutorial of this section, see the following:

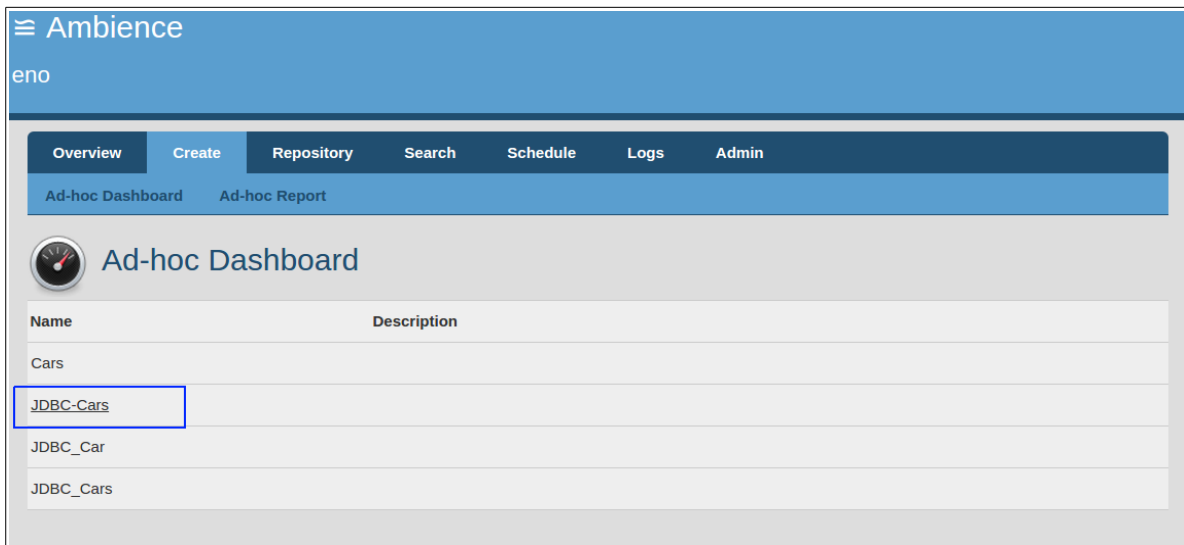
- <https://www.youtube.com/watch?v=GmYQYpAcO1o>
- <https://www.youtube.com/watch?v=5yxl-TSyoc4>

To create your dashboard, perform the actions in the following sections:

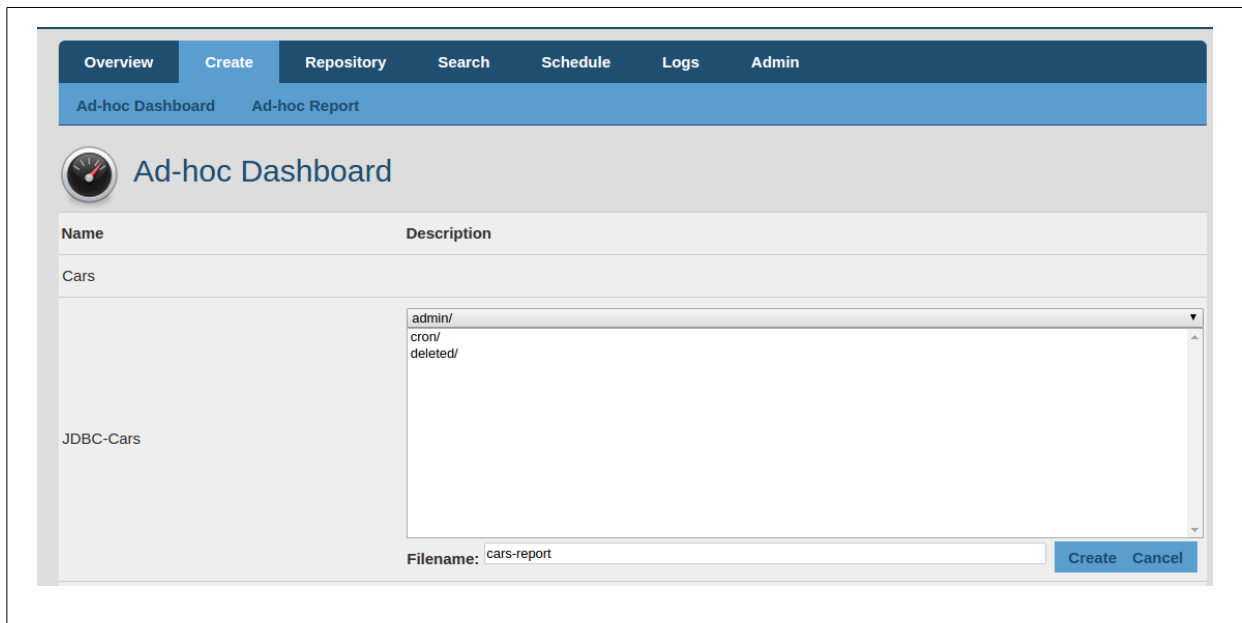
Part 1 - Accessing the Adhoc Dashboard Application

To login and create a new dashboard:

1. Login to the web application.
2. Click **Create Ad-hoc Dashboard** and then click **JDBC-Cars**, to use the **JDBC-Cars** Universe for your dashboard.



3. Select a location in the repository from the drop-down list. Enter the file name and click **Create**.



4. The system creates a blank dashboard and opens it in **Edit** mode, in a new browser tab:



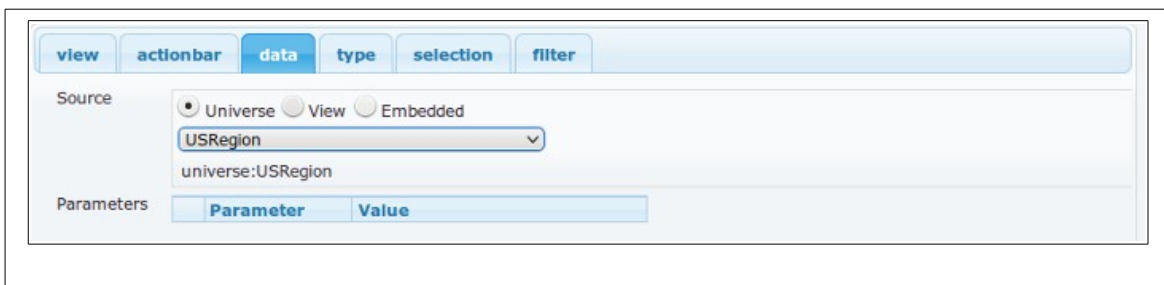
Part 2 - Setting up the Grid Selection


1. Click the **Components** tab. Drag and drop the **Grid** component to the workspace.

Grid view shows unique values from a particular column in the universe. A grid is a selection mechanism to narrow down the range of values, and is used to view a summary of the data.

For more information on the Grid component, see the section called “Grid” in the User manual.

2. Right-click the **Grid** Component in the workspace and select **Properties**.
3. Navigate to the **data** tab and set the Universe table to **US Region** as shown:



4. Click the  icon. Select the Region and Region ID columns as shown.

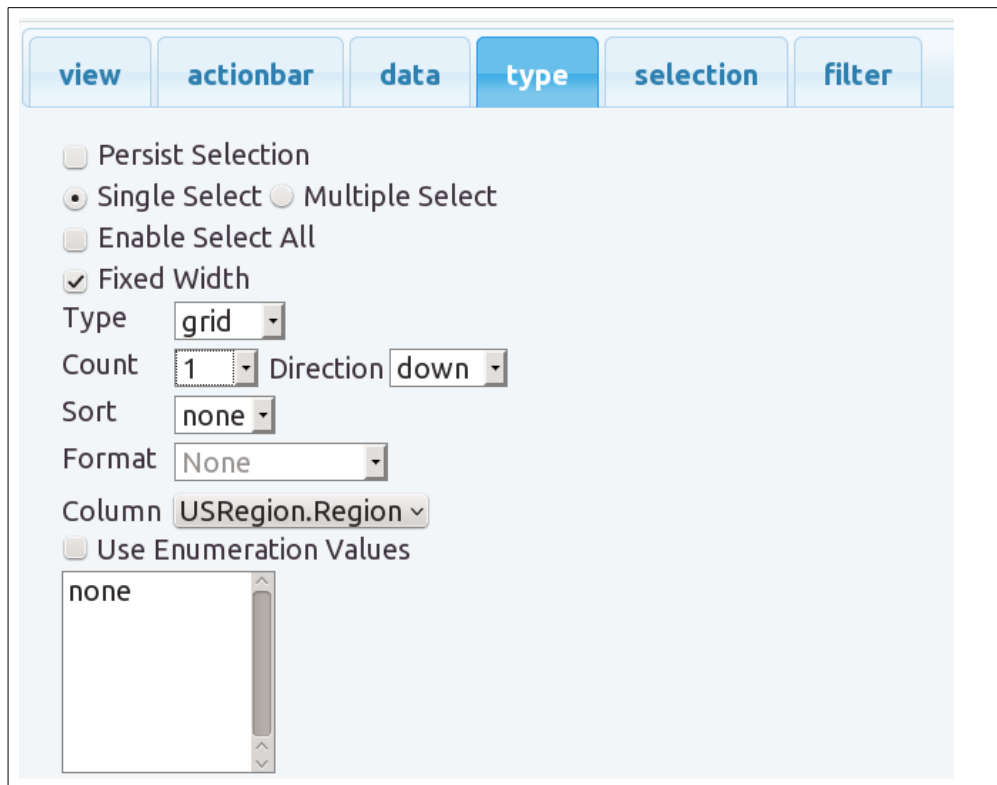


You can select multiple columns across tables as required. The system is smart to figure out the relationships between the entities and present you the data seamlessly.

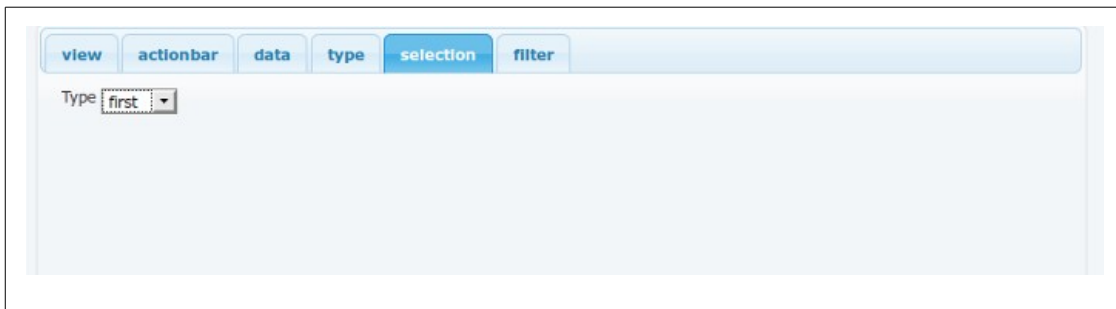
This populates the grid with the four US regions.

5. Navigate to the **type** tab and set the Column to **Region** as shown. The **Count** and **Direction** properties define the layout of the grid.

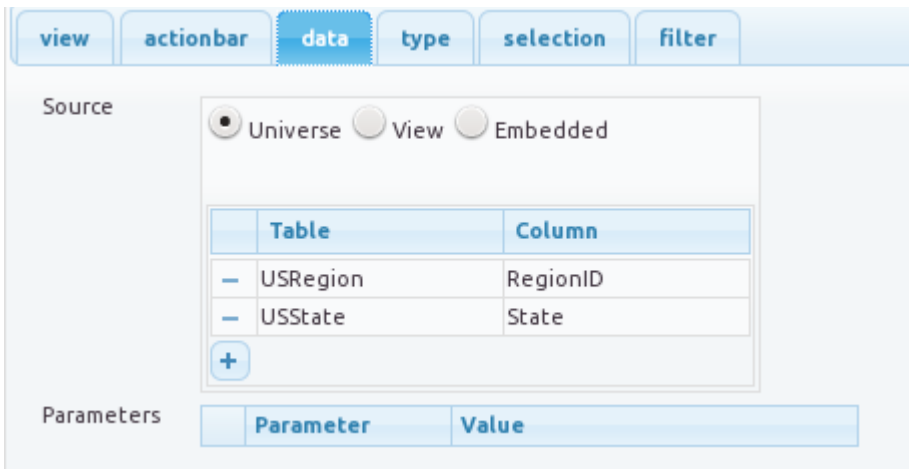
The **Count** value indicates that the grid is to have one row of data. The grid is set as a single selection grid - only one value from the grid can be selected at a time.



6. Navigate to the **selection** tab and set the Type to **first** as shown. This indicates that the first value on the grid is selected by default.



7. Click **Apply** to apply the changes.
8. Drag and drop another **Grid** component to the workspace, and align it below the first grid.
9. Right-click the second **Grid** component in the workspace and select **Properties**.
10. Navigate to the **data** tab and set the Universe table to **US State** as shown:



11. Click the  icon. Select the State and Region ID columns as shown.



This specifies that the US States should be displayed on the grid.

12. Navigate to the **type** tab and set the Column to **State** as shown:

The **Count** and **Direction** properties define the layout of the grid.

Here, you also set the Count as 2 - indicating that the grid is to have two rows of data, and the direction as Down, which specifies that the rows are to be one below the other.

In addition, the grid is set as Multiple Select. This allows multiple selection of values from the grid.

Set the sort order to ascending. This sorts the State codes in alphabetical order for display.

view **actionbar** **data** **type** **selection** **filter**

Persist Selection
 Single Select Multiple Select
 Enable Select All
 Fixed Width
Type
Count Direction
Sort
Format
Column
 Use Enumeration Values


none

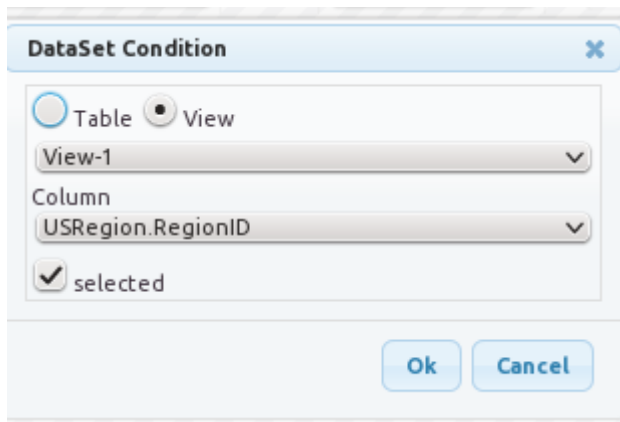
13. Navigate to the **selection** tab and set the Type to `first` as shown. This indicates that the first value is selected and highlighted by default.

view **actionbar** **data** **type** **selection** **filter**

Type

14. Navigate to the **filters** tab and set the properties as follows:

- Name: US Region ID
- Filter: in-dataset
- Condition: Click the  icon and set the condition as shown: Click **OK** to save the changes.



Here, you select to filter values based on the common column RegionID, that is present in the first grid (the Region grid), that is named as **View-1** on your dashboard.

The values are then filtered, and only the States that correspond to the Region selected in the first grid, are displayed in this second grid.

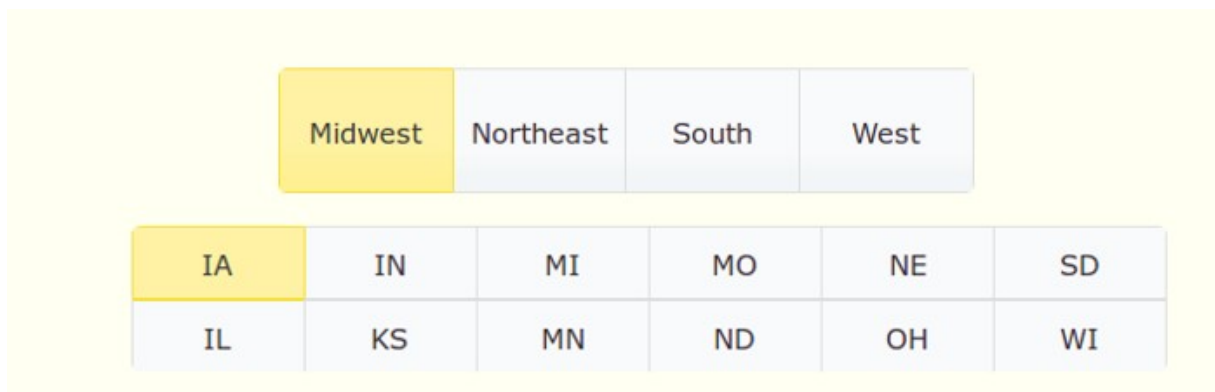
The filter after selection, is as shown:



15. Click **Apply** to apply the changes.
16. Click Save to save your dashboard.
17. Click **Run** to navigate to the **RUN** mode and check that your grid selection works. Select the Regions from the first grid and watch the second grid automatically display only those states that correspond to the selected region from the first grid.

Here are some screen shots that show you how the grid selection works:

Midwest:



Northeast:

Midwest	Northeast	South	West	
CT	ME	NJ	PA	VT
MA	NH	NY	RI	

South:

Midwest	Northeast	South	West					
AL	DC	FL	KY	MD	NC	SC	TX	WV
AR	DE	GA	LA	MS	OK	TN	VA	

West:

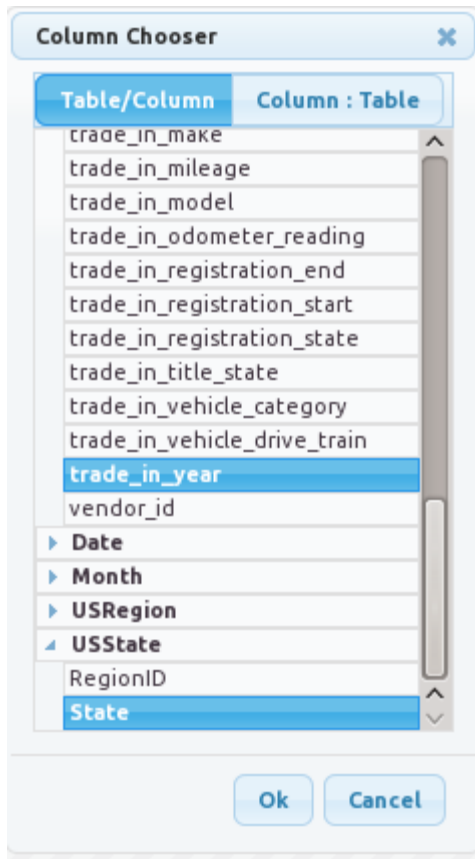
Midwest	Northeast	South	West			
AK	CA	HI	MT	NV	UT	WY
AZ	CO	ID	NM	OR	WA	

Part 3 - Viewing the Data

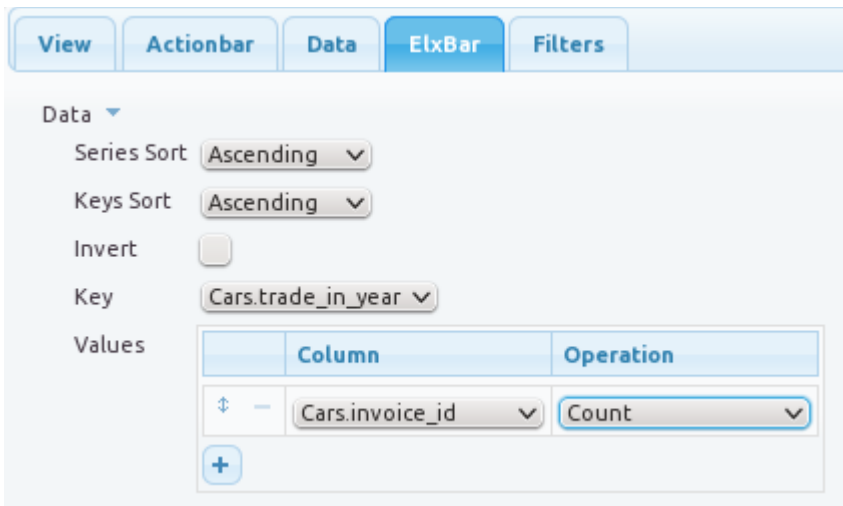
In Part 1, you have set up the grid selection and ensured that the States corresponding to the selected Region are displayed.

In this section, you set up the Bar Chart to view the data for the selected States.

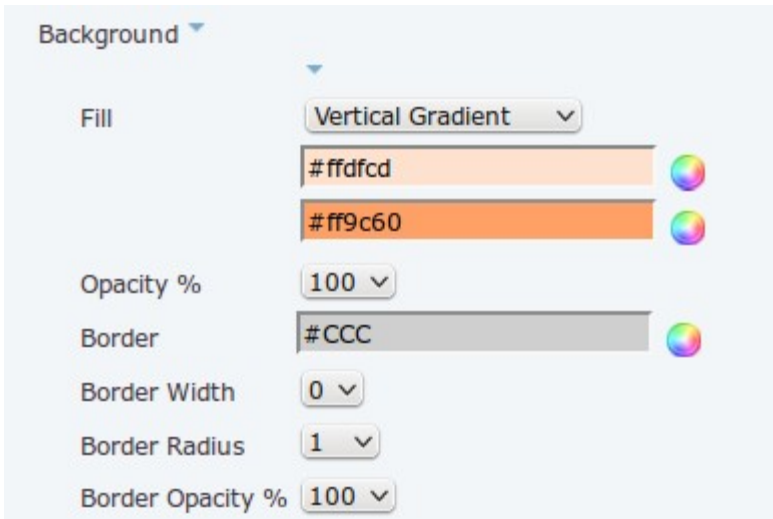
1. Drag the **Bar Chart** component on to the workspace and position it below the second grid - i.e. the States grid.
2. Right-click the **Bar Chart** component in the workspace and select **Properties**.
3. Navigate to the **Data** tab and select the `invoice_id` and `trade_in_year` columns from the `Cars` table. Also select the `State` column from the `US.State` table.



4. Navigate to the **ElxBar** tab and set the Key to `trade_in_year`. The years are plotted on the Y-axis.
5. In the Values table, set the Column to `invoice_id` and the Operation to **Count**.
6. The total number of traded-in invoices for each year is plotted on the X-axis. This denotes the number of cars traded-in for the year.



7. From the **ElxBar** tab, set the Background fill color and the border color as shown:



8. From the **ElxBar** tab, set the Chart Title, the Y-Axis Title (Subtitle West), and the position of the Legend to West as shown:

Title ▾

Text

Font ▸

Position ▾

Alignment ▾

Rotation ▾

Padding ▾

Gap ▾

Subtitle North ▸

Subtitle South ▸

Subtitle East ▸

Subtitle West ▾

Text

Font ▸

Alignment ▾

Rotation ▾

Padding ▾

Gap ▾

Legend ▾


Position ▾

Alignment ▾

Padding ▾

Gap ▾

9. Navigate to the **Filters** tab and set the properties as follows:

- Name: US State
- Filter: in-dataset
- Condition: Click the  icon and set the condition as shown. Click **OK** to save the changes.

DataSet Condition ✕

Table View

▾

Column

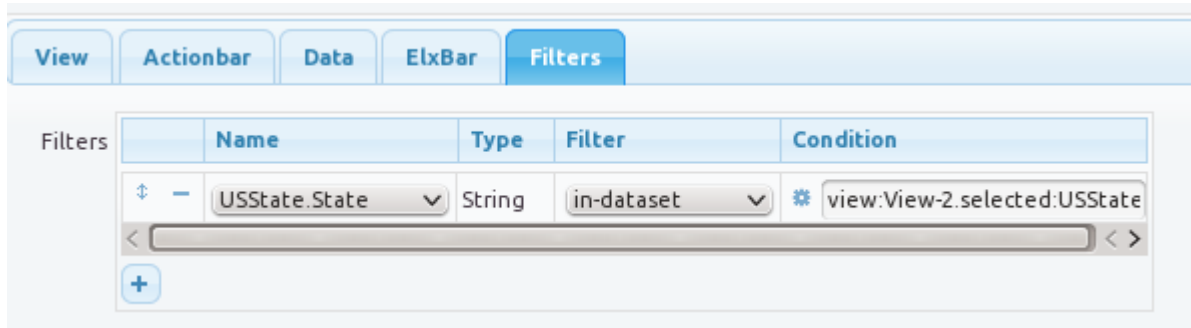
▾

selected

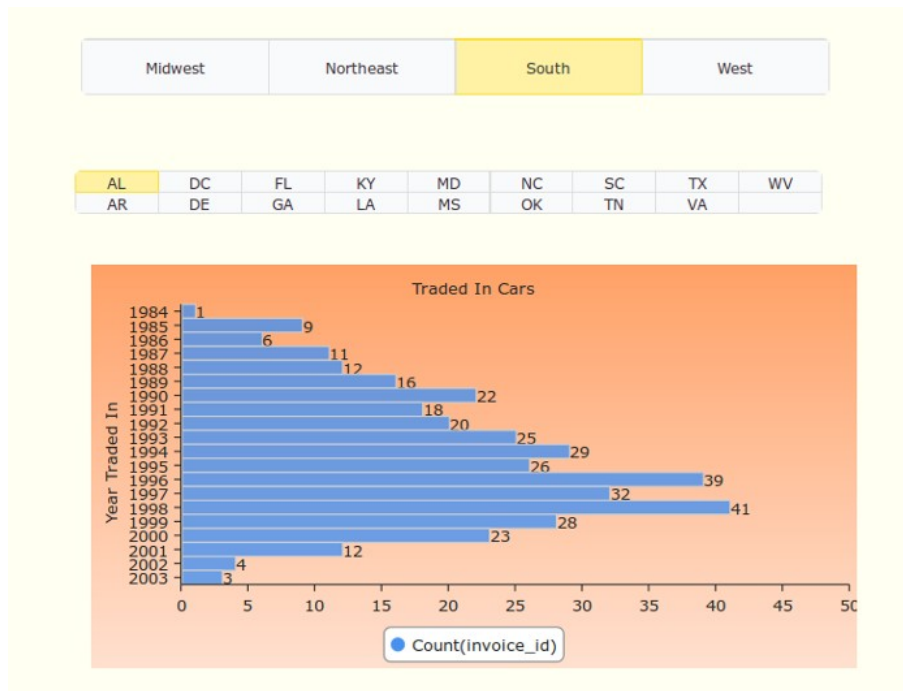
Here, you select to filter values based on State, that is present in the second grid (the State grid), that is named as `View-2` on your dashboard.

The values are then filtered, and only the data for the States selected in the second grid, are displayed in this bar chart.

This filter after selection is as shown:




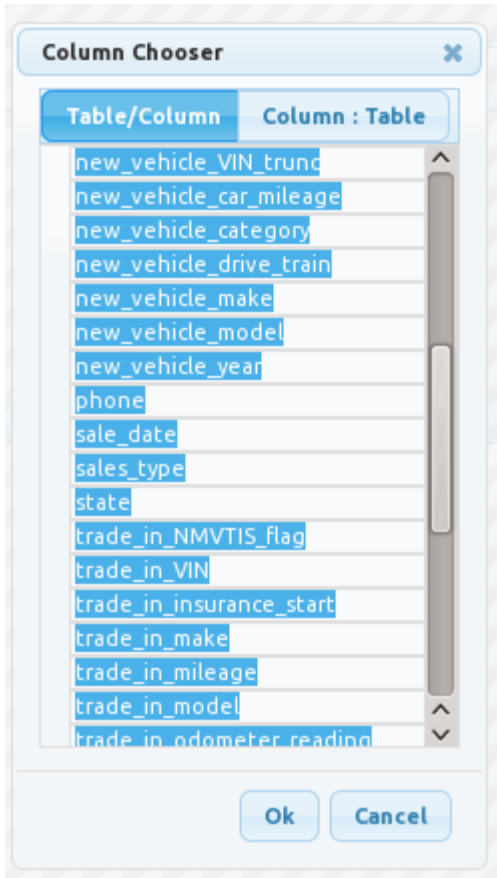
10. Click **Apply** to apply the changes.
11. Click **Save** to save your dashboard.
12. Click **Run** to change the dashboard mode to Run.
13. Click **Reset** to rest the dashboard to the default state.
14. Select a region and state and view the data as shown:



The chart shows the number of old cars that were traded in for new cars each year.

Part 4 - Drilling Down Into the Data


1. Click the Add Cards icon  from the cards explorer, to add a new card. A new card named card2 is added.
2. Navigate to the second card and drag and drop a Table component on to the workspace.
3. Right click the Table component and select **Properties**.
4. Navigate to the **data** tab and select all the columns from the Cars table as shown:

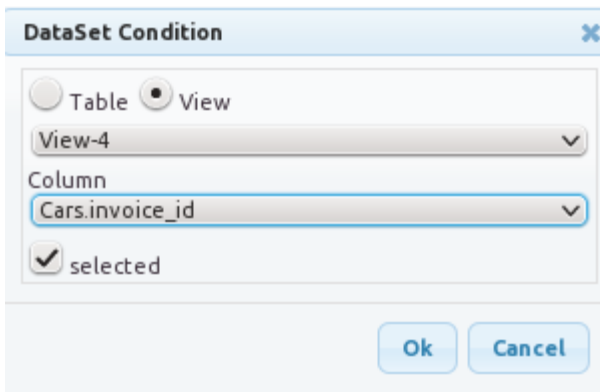


5. Navigate to the **type** tab and select the columns to be displayed in the table. Also, set the Page Size as desired.
6. Page Size indicates the number of rows to display in one page of the table.

<input checked="" type="checkbox"/>	Column	Alias	Format	Alignment	Text Overflow	Width	Hyperlink Text	Sortable	Allow Render	Renderers
<input checked="" type="checkbox"/>	Cars.phone	Cars.phone	None	left	nowrap	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✖ (0)
<input checked="" type="checkbox"/>	Cars.ZIP	Cars.ZIP	None	left	nowrap	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✖ (0)
<input checked="" type="checkbox"/>	Cars.disposal_status	Cars.disposal_status	None	left	nowrap	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✖ (0)
<input checked="" type="checkbox"/>	Cars.area_code	Cars.area_code	None	left	nowrap	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✖ (0)
<input checked="" type="checkbox"/>	Cars.dealer_name	Cars.dealer_name	None	left	nowrap	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✖ (0)
<input checked="" type="checkbox"/>	Cars.invoice_id	Cars.invoice_id	0	right	nowrap	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✖ (0)

For more information on Table, see the section called “Table” in the User Guide.

7. Navigate to the **filters** tab and set the properties as follows:
 - Name: invoice_id
 - Filter: in-dataset
 - Condition: Click the  icon and set the condition as shown: Click **OK** to save the changes.



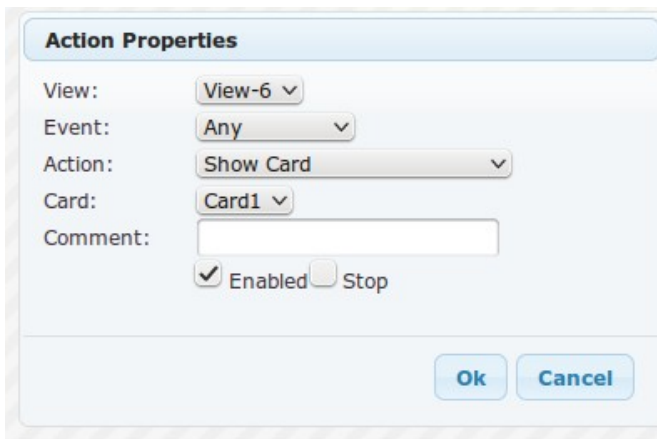
Here, you select to filter values based on **invoice_id**, that is present in the Bar Chart, that is named as **View-3** on your dashboard.

8. Click **Apply** to apply the changes. The final table is similar to the following:

vendor_id	dealer_name	city	state	ZI
124	MILLER CHEVROLET, LLC	Rogers	MN	
130	MIDWEST MOTORS, LLC	Inver Grove Heights	MN	
130	MIDWEST MOTORS, LLC	Inver Grove Heights	MN	
1141	DODGE OF BURNSVILLE INC	Burnsville	MN	
1208	FREEWAY AUTO CENTER, LLC	Duluth	MN	
1208	FREEWAY AUTO CENTER, LLC	Duluth	MN	
1208	FREEWAY AUTO CENTER, LLC	Duluth	MN	
1208	FREEWAY AUTO CENTER, LLC	Duluth	MN	

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9. Drag and drop a **Button** component on to the workspace of Card2.
10. Right-click the **Button** component in the workspace and select **Add Action**.
11. Select the Event as **Any**, the Action as **Show Card** and the Card as **Card1**
12. Ensure that the **Enabled** checkbox is selected.



Action Properties

View: View-6 ▾

Event: Any ▾

Action: Show Card ▾

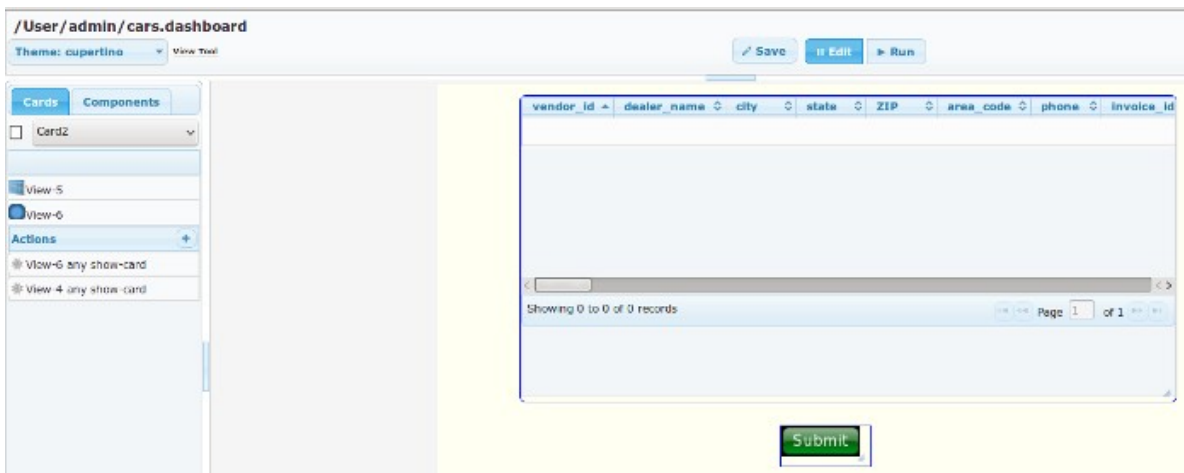
Card: Card1 ▾

Comment:

Enabled Stop

Ok Cancel

13. Click **OK** to save the action. The completed Card 2 with the **Submit** button is as follows:



The screenshot shows a dashboard interface for a user named 'admin' in the 'cars.dashboard' view. The theme is 'cupertino'. On the left, there is a 'Cards' explorer showing 'Card2' selected. The main workspace contains a card with a table header: 'vendor_id', 'dealer_name', 'city', 'state', 'ZIP', 'area_code', 'phone', and 'invoice_id'. Below the table, it says 'Showing 0 to 0 of 0 records' and 'Page 1 of 1'. A green 'Submit' button is located at the bottom of the card.

Clicking this button (either a single click or a double click) will navigate back to the first card.

14. Navigate to Card 1 using the card explorer.
15. Drag and drop a **Button** component on to Card1.
16. Right-click the **Button** component in the workspace and select **Add Action**.
17. Select the Event as **Any**, the Action as **Show Card** and the Card as **Card2**
18. Ensure that the **Enabled** checkbox is selected.

Action Properties

View:

Event:

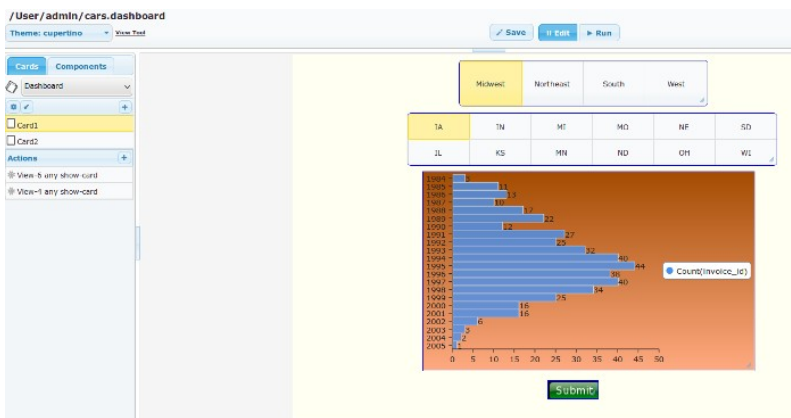
Action:

Card:

Comment:

Enabled Stop

19. Click **OK** to save the action. The completed Card 1 with the **Submit** button looks as follows:



Clicking this button (either a single click or a double click) will navigate to the second card.

Congratulations. Your dashboard is now created.