# **Prextra documentation**



# Dashboard Designer

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# **Dashboard Designer**

The dashboard designer allows you to design your own dashboards.

You can also design a dashboard from an existing one to copy it and make desired modifications.

*Click here to view the webinar introducing the dashboard designer. This webinar is only available in French.* 

To create a dashboard, navigate to the "My dashboards" option in the "Management" menu of the "Options-user" module.

**NOTE:** To access this option, the authorizing manager must grant you permission, and you must have access to "Allow the user to create a new dashboard" of the "System Management Tab" in the user access to create a dashboard.

# 1. Dashboard

When accessing this option, all your authorized dashboards will be displayed in the right section.

Additionally, you will be able to share a dashboard in read-only mode to the desired users via the sharing icon to the right of a dashboard, and to pin a dashboard to open by default via the pinning icon.

To create a new dashboard, click on the "New..." button.

ASHBOARDS	<		Sales	Dashboard					010
ales Dashboard •	38,361 Sales order total 5	49 Number of orders		312 Total quantity	17 Total pending			54 Total quantity	
	Compliance with delivery deadlines			Orders by Customer					
	*						Grand Total		
			Delay		Quantity	Selling S	Discount \$	Costing \$	Profit margin
			In time	* Alphabet et nouilles	180.00	14,522.70	19.07	231.40	
				* B-Bolduc Inc.	13.00	-1,482.00	0.00	18.00	1
				Bénéva - Assurances	1.00	0.00	0.00	0.00	
				<ul> <li>CDID' INC</li> </ul>	106.99	18,915.70	0.00	91.42	1
		21		* Client comptoir de facturation	1.00	1,383.23	0.00	0.00	
	Sale orders by sales rep. \$	Sale orders by product category \$		* Marché aux puces	1.00	5,000.00	0.00	0.00	1
	sale orders by sales rep. s	sale orders by product category s		* Shop-and-go Grand Total	9.00	40.25	0.00	1.50	
	17066 Nine Rejú Druin Sarare Latojn 13	12,045	1 SUKV						
	Sale orders total by month \$			Deliveries of the next 7 days					
	40K			Customers		SO#	Order		Delivery date
New				Alphabet et nouilles		3357	26/01		26/01/2024
	Xalues			Alphabet et nouilles		3261	09/02		99/02/2024
8				Alphabet et noulles		3363	09/02		99/02/2024
	OK January	February Ma	ech.	Alphabet et nouilles		2326	28/02		28/02/2024
	January	rearrany Ma	nen -	Alphabet et nouilles		3377	28/02	2024	28/02/2024

**NOTE:** Dashboards that you have previously created will be available for editing again via an "Edit in designer" button, if needed.

**NOTE:** To delete a dashboard, you must click on the trash can icon of the desired dashboard. A dashboard can only be deleted by the user who created it.

# 2. Create a dashboard

Once you've clicked on the "New..." button, a new screen will be displayed. Enter the code for the new dashboard in the "Title" field.

It is possible to create a dashboard either from an existing dashboard or from a data source. If you want to create a new dashboard by using a copy of an existing dashboard, select the desired dashboard from the "From an existing dashboard" section.

If you want to create a new dashboard from a data source, select the desired data source via the "From a data source" section.

DASHBOARD MENU	NEW				
New					
Save	Title				
Data Sources	> Sales orde	ler Dashboard			
Title					
Currency	Prom an ex	xisting dashboard		From a data source 9. Search	
Parameters		de bord des ventes - SalesBySr		(prodStatsMainfb)	
Color Scheme		ue unu ues venies - paresegor		Bronominum	4
	Tableau d	de bord de production - ProdDashboard	Or		
	Tableau d	de bord des commandes			
				From an SQL (	RABELY
				Create	

**NOTE:** It is also possible to create a dashboard from an SQL query. To do so, you need to click on the link "From an SQL query" above the "Create" button. To create dashboards from SQL queries, please submit a request to our Technical team so that we can create your data source and assign you the necessary access.

**IMPORTANT:** In this menu, you can also create a new dashboard, access data sources, modify the dashboard title, apply the desired currency type for monetary data, and apply other settings. By adding parameters, you will be able to modify them in the dashboard via the settings icon, and subsequently, you can create filters on these parameters.

**For example :** In order to create a date range to display the dashboard, you must add the date settings. To do this, you must click "Add" in the "Parameter List" section to enter the details of a "Date" parameter by entering the parameter description, type and default value. When this parameter is added, it will be possible to create a second parameter "To date" in order to add an end date.

DASHBOARD MENU	PARAMETERS					
New						
Save	Q. Search	Reorder Add	Paramètre1		LOOK-UP SETTINGS	
Data Sources	Paramètre1	<b>a</b>	DESCRIPTION			
Title	From date		From date			
Currency	Paramètre2 To date		Visible			
Parameters			Allow Null			
Color Scheme			Allow Multiselect			
			түре			
			Date	-		
			DEFAULT VALUE (STATIC)			
			12/05/2024, 12:00 AM	•		
			- VALIDATION QUERY (SQL)			
			<pre>1 result; DT 2 0 -&gt; imolif parameter 3 1 -&gt; all parameters are valid 4 enessage: string? 5 usive he parameter is invalid 7 to use a parameter: ?parameterName 9 columns must be aliased like so 10 StLECT 1 AS result, '' AS message</pre>			

When the parameters will be added, they can be applied to the dashboard and used via the icon

Dashboard Paran	neters	×
Parameter	Value	
From date	12/05/2024	
To date	15/05/2024	
Reset	Submit	ancel

# 3. Dashboard Designer

Once you have clicked on the "Create" button, you will have access to the dashboard designer, and the title of the dashboard will be displayed in the header of the dashboard.

**NOTE:** It is possible to create a label in Prextra and enter the label name in the "Label Name" field of the dashboard designer to manage the user's language for the dashboard title.

When creating a new dashboard using a copy of an existing one, the information from the original dashboard will be displayed. If you create a dashboard from a data source, you will be able to build it entirely.

=	N ∩ w:	AUTO FO	ED	) px	H: AUTO	FIXED	; рх	Label name:	Parameters SP name:	Refresh interval (min): 30	
COMMON							Sales	order Dashboard			0 1 8
ΞΣ							oales e	Just Dashboard			
4.16											
4 🕹											
<b>E</b> (S)											
<b></b>											
MAPS											
< 🤊											
• •											
FATER											
						Drag an item fro	om the Toolbox	or click a button below to crea	ite a new item.		
•					🖩 Σ 💼	F 🕘 🛃 🗉	0 🖾 🖻	i 🖬 🤹 🍠 🍎 🍎 🖡	i o 🗉 🗗 🛗 🖸 🝺		
LAYOUT											
0 0											
_											
VIEWER											

**NOTE:** During any modification in the dashboard designer, you will be able to use the return and progress icons to revert changes. Additionally, remember to save the modifications. Click on the menu, then select "Save".

**NOTE:** The icon in the header on the right of the dashboard allow you to refresh the dashboard once built, remove applied filters, and save settings. The settings will be available for modification via the settings icon, and they are only displayed if you have added a parameter in the designer menu.

In the dashboard designer, you will be able to click on the various features available in the toolbar on the left.

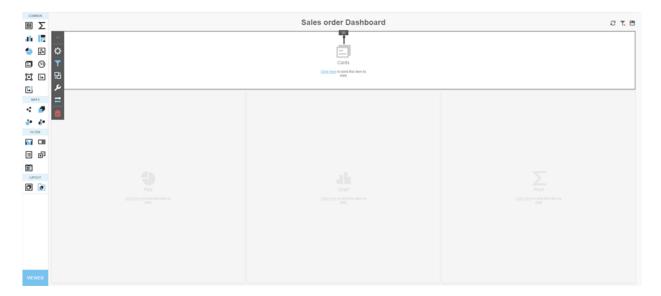
By clicking on an icon, the corresponding functionality will be automatically added.

=	in ci	W: AU	TO FIXE	D	) рх	H: AUTO	FIXED	) px	Label name:	Parameters SP name:	Refresh interval (min): 30	
COMMON								Sales	order Dashboa	rd		OT.
ΞΣ								Gales	order Dashboa	i u		
t le												
•												
. 0												
1 🖬												
<u>.</u>												
MAPS												
•												
e e												
FLTER												
							Drag a	an item from the Tool	ox or click a button below	v to create a new item.		
∎ ⊡						<b>■ ▼</b>				¿• 🛐 💷 🗐 🗗 🛅 🕖		
LAYOUT												
0 0												
VIEWER												

You will then be able to select multiple features to add to the dashboard.

To move features, use the moving icon to move them to the desired location on the dashboard, and to resize features, use the arrow icon.

Additionally, by selecting a feature on the dashboard, a parameter menu will be displayed. Please refer to the next points to set up the features.



In this example, a header card has been added, along with a pie chart, a bar chart, and a pivot.

<u>Field :</u>	Description :
"Common" section :	This section allows you to add common features to the dashboard.

<u>Field :</u>	Description :
*	This icon allows you to add a grid to the dashboard.
Σ	This icon allows you to add a pivot to the dashboard. Please refer to section 4.4 of this document to configure a pivot.
46	This icon allows you to add a chart to the dashboard. Please refer to section 4.3 of this document to configure a bar chart.
*	This icon allows you to add a treemap to the dashboard.
•	This icon allows you to add a pie chart to the dashboard. Please refer to section 4.2 of this document to configure a pie chart.
*	This icon allows you to add a scatter chart to the dashboard.
	This icon allows you to add a card to the dashboard. Please refer to section 4.1 of this document to configure a card.
*	This icon allows you to add a gauge to the dashboard.
*	This icon allows you to add a text box to the dashboard.
*	This icon allows you to add an image to the dashboard.
*	This icon allows you to add a bound image to the dashboard.
"Maps" section :	This section allows you to add maps to the dashboard.
*	This icon allows you to add a geo point map to the dashboard.

<u>Field :</u>	Description :
*	This icon allows you to add a choropleth map to the dashboard.
*	This icon allows you to add a bubble map to the dashboard.
<b>ن</b> • *	This icon allows you to add a pie map to the dashboard.
"Filter" section :	This section allows you to add filters to the dashboard.
*	This icon allows you to add a range gram to the dashboard.
*	This icon allows you to add a combo box to the dashboard.
*	This icon allows you to add a list box to the dashboard.
*	This icon allows you to add a tree view to the dashboard.
*	This icon allows you to add a date filter to the dashboard.
"Layout" section :	This section allows you to add layouts to the dashboard.
*	This icon allows you to add an empty section to the dashboard to add a feature within it.
*	This icon allows you to add tabs to the dashboard to add features within each tab. Additionally, you will be able to rename each tab in the tab addition options.

\*This feature is not explained in this document. Please refer to your project manager.

# 4. Certain functionalities available

In this document, only the "Card", "Pie Chart", "Bar Chart", and "Pivot" functionalities are explained.

However, several functionalities use the same configurations, so you will be able to use this document for other available features.

For more information on the other functionalities, please refer to your project manager.

Furthermore, this designer is based on the DevExpress designer.

Here is the documentation for this designer:

https://docs.devexpress.com/Dashboard/116994/web-dashboard/create-dashboards-on-the-web

# 4.1 Card

A card allows you to display information in the dashboard.

### 4.1.1 Configure the card

This icon allows you to configure the card through a new dropdown menu.

NOTE: The dropdown menu for configurations contains sections, each with its own options.

# "Cards" section

This section allows you to add one or more cards and configure them. Click the "Add Card" button to add a card.

o The option "Binding" allows you to select the card to add.

In this example, the total quantity of orders has been added.

~	CARDS X	←	
0	Configure Card	BINDING	
r	SERIE S	P f+ 1	÷
ĵ	Add Series	Project #	ab
	SPARKLINE	Project description	ab
	Set Argument	Qty 🔶	-25
	HIDDEN DIMENSIONS	Qty in production	-25
	Add Dimension	Qty on hold	.25
1	HIDDEN MEASURES	Quote nbr	12
	Add Measure	Report parameters	ab
		Sales rep.	ab
		Sector	ab
	DATA SOURCE 🗎	chintoname	
		OPTIONS	

When a card is added, it will be displayed in the background, and you will be able to modify it through the available options.

**NOTE:** The card displayed in the background reflects real-time changes made.



When adding the card, it automatically creates an initial target.

To modify the card format, click again on the card, then on the generated target.



You will be able to modify the data type in the "Summary Type" field.

In this example, when adding the card, the data type was a sum and it was changed to "Count", displaying the number of orders in the dashboard.

RDS	×	÷	Actual
Qty (Count)	÷	BINDING	Qty
	<u> </u>		City
Add Card		,♀ f+ ℓ	÷
SERIES		Active	<b>68</b>
Add Series		Amount	25
SPARKLINE		Budget	25
Set Argument		Cost	
HIDDEN DIMENSIONS		Currency	-
Add Dimension		Currency name	-
HIDDEN MEASURES		Customer no.	-
Add Measure		Customer PO	-
And measure		Customers	
		Daliana dala	-
		SUMMARY TYPE	
		Count -	•
		CALCULATIONS	
DATA SOURCE 블		FILTER	
Sales statistics/salesStatsMa	ain		
		FORMAT	

o **The option "Calculations"** allows you to modify the calculation type of the card. This option is less commonly used in the card functionality.

o **The option "Filter"** allows you to filter the card using a filter editor. **NOTE:** Please refer to sections 4.2.1 and 4.2.2 for the filter editor.

o The option "Format" allows you to modify the format of the card value.

In this example, the format type was changed to "Number", the unit was changed to "Ones", and the decimals were removed.



Click on the arrow to return to the "Card" section.

o **The option "Options**" allows you to modify the card options.

Enter a new label in the "Caption" field to rename the card label, if needed.

CARDS	< <del>(</del>		
Number total of sales order 👘		Qty (Count)	
Add Card		Target	
SERIE S			
Add Series	OPT	TION S	
SPARKLINE		PTION	Quantity total of sales order
Set Argument	Qu	uantity total of sales order	Quality total of sales order
HIDDEN DIMENSIONS	CAR	RD LAYOUT	
Add Dimension	DEU	TA OPTIONS	
HIDDEN MEASURES	SPARKLINE OPTIONS		
Add Measure			
	FOR	RMAT OPTIONS	
DATA SOURCE 🛢	CON	NDITIONAL FORMATTING	
Sales statistics/salesStatsMain			

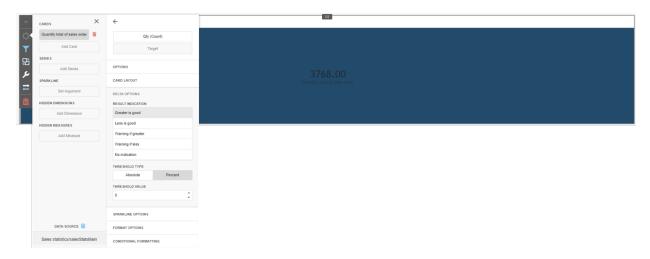
o The option "Card layout" allows you to visually modify the frame of the card.

Select the style to apply to the card.

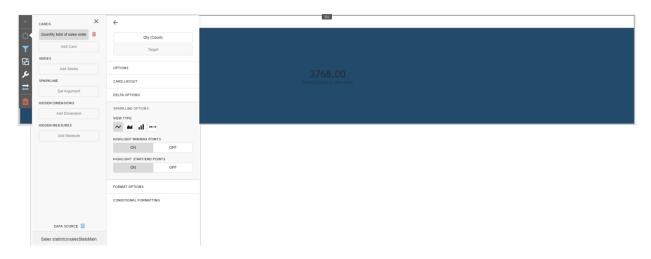
		×	
DS		~	<del>(</del>
Quantity to	tal of sales order		Qty (Count)
	Add Card		Target
RIES			
	Add Series		OPTIONS
SPARKLINE			CARD LAYOUT
s	Set Argument		
HIDDEN DIM	ENSIONS		1 5
	dd Dimension		Stretched
			Centered
HIDDEN MEA			Compact
A	Add Measure		Lightweight
			DELTA OPTIONS
			SPARKLINE OPTION S
DA	ATA SOURCE 冒		FORMAT OPTIONS
Sales stat	tistics/salesStatsMai	n	CONDITIONAL FORMATTING

**NOTE:** It is possible to click on each of the styles to modify them. This functionality is not explained in this document. Additionally, in the provided dashboards of Prextra, the applied frame is "Lightweight".

o The option "Delta options" allows you to add result indicators.



o **The option "Sparkline options"** allow you to modify the display type, highlight minimum and maximum points, and highlight start and end points for the peak.



o The option "Format options" allows you to apply a format to the value displayed in the card.

_				
^	CARDS	×	÷	
<u>ې</u>	Quantity total of sales order	â	Qty (Count)	
T	Add Card		Target	
뮰	SERIES			
20 6	Add Series		OPTIONS	3768.00
=	SPARKLINE		CARD LAYOUT	Quantity total of sales order
-	Set Argument		DELTA OPTIONS	
	HIDDEN DIMENSIONS		SPARKLINE OPTION S	
	Add Dimension		SPARKLINE OPTIONS	
	HIDDEN MEASURES		FORMAT OPTIONS	
	Add Measure		1	
			Actual value	
			Absolute variation	
			Percent variation	
			Percent of target	
	DATA SOURCE 블			
	Sales statistics/salesStatsM	tain	CONDITIONAL FORMATTING	

o The option "Conditional Formatting" allows you to create specifications in the card.

This option is less commonly used in the card functionality.

**NOTE:** Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

# "Series" section

This section allows you to add series to the card.

A series allows you to create a card for each separately selected series.

Click on the "Add Series" button to add a series.

o The option "Binding" allows you to select a series.

In this example, a series of customers has been added, segmenting the card by customer.

∧ <sub>CARDS</sub> X	÷									
Quantity total of sales order	BINDING Custome	3.00	802.00	56.00	21.00	194.00	73.00	7.00	82.00	135.00
Add Card	<i>P f</i> <sub>+</sub> <i>ℓ</i> =		CDID' INC	CUI	CLI2	CLI3	CLI4	Client 91529	Client compte à co	Client Comptoir
Customers 📋	Customer PO									
Add Series	Customers	.00 St-Fablen	387.00	44.00 Europe Candy	29.00 FAMOUS DESSERTS	74.00 Folies au caramel	212.00 Folies au Chocolat	44.00 Friandise et chocol	5.00 Gérald et frères	14.00
SPARKLINE	Delivery date Customers		Doint & cit	Caroje Sanoj						
Set Argument	Discount adisplayment?days	00	22.00	3.00	32.00	16.00	69.00	64.00		
HIDDEN DIMENSIONS	displayred	RMANDES	LES SUCRERIES D'A	Marché aux puces	MOMIS DELICACIES	Pharmacie Inc.	Shop-and-go	SWEETS & CANDIES		
Add Dimension	Division									
HIDDEN MEASURES	Due Date									
Add Measure	Held orders									
	OPTIONS									
	DATA SHAPING									
DATA SOURCE 🛢	CONDITIONAL FORMATTING									
Sales statistics/salesStatsMain	TOP N									

o The option "Options" allows you to rename the label of the card.

o **The option "Data Shaping"** allows you to display data according to different parameters. In this example, a descending sort of data has been applied for the number of orders per customer.

^	CARDS ×	÷									
<b>Q</b> -	Quantity total of sales order	BINDING Customers	.00	3.00	22.00	13.00	14.00	188.00	84.00	14.00	5.00
T	Add Card	OPTIONS	DELICACIES	Marché aux puces		LES GOURMANDES	LES GÄTERIES CHO	Les Décorations JB	LE BEC SUCRÈ	International Bakery	Gérald et frère
£	SERIES	DATA SHAPING									
ىر	Customers	SORT ORDER	.00	44.00	387.00	46.00	76.00	104.00	3.00	135.00	82.00
Ħ	Add Series	Ascending Descending	DESSERTS	Europe Candy	Dulac & cle	Comptoir St-Fabien	Client US non taxa	Client comptoir sa	Client comptoir de	Client Comptoir	Client compte à co
侖	SPARKLINE Set Argument	(Value) *	00	E( 00	802.00	112.00	111.00	22.00	E08.00		
	HIDDEN DIMENSIONS	GROUP INTERVAL	.00	56.00	802.00 CDID' INC	113.00 Café et biscotte	111.00 Bénéva - Assurances	33.00 B-Bolduc Inc.	598.00 Alphabet et nouilles		
	Add Dimension	No Grouping Alphabetical									
	HIDDEN MEASURES	CONDITIONAL FORMATTING									
	Add Measure										
	DATA SOURCE	TOPN									
	Sales statistics/salesStatsMain										

NOTE: In this document, the series has been removed for the following points.

o The option "Conditional Formatting" allows you to create specifications in the card.

This option is less commonly used in the card functionality.

**NOTE:** Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

o **The option "Top N"** allows you to restrict the data to display in the card.

This option is less commonly used in the card functionality.

**NOTE:** Please refer to the "Top N" option in the "Arguments" section of point 4.2.1 of this document for an example of Top N.

### "Sparkline" section

This section allows you to add sparkline to the card. A sparkline allows you to segment the card by arguments. This option is less commonly used in the card functionality.

#### "Hidden dimensions" section

This section allows you to add hidden dimensions to the card.

A hidden dimension adds a dimension that affects the card but will not be displayed to users in the dashboard.

In this example, the "Order Date" dimension with the "Exact Date" condition has been added, allowing it to be used later in the card filter.

**NOTE:** You will be able to rename the dimension, shape the data, and modify the format of the dimension via the options provided. Please refer to the previous elements for its options.



#### "Hidden measures" section

This section allows you to add hidden measures to the card.

A hidden measure allows you to add a measure that affects the card but will not be displayed to users in the dashboard.

NOTE: This functionality is not explained in this document.

#### 4.1.2 Filter the card

This icon allows you to filter the card using a filter editor.

In this example, a filter has been added to the hidden dimension "Order Date" to filter the number of orders if the order date falls between the "From Date" and "To Date" parameters of the dashboard.

^	FILTERS	$\times$	Filter Editor ×	
☆ 〒 昭 ≯ 〓 龠		ON a	And Order Date is greater than or equal to Parameter: • Order Date is less than or equal to Parameter: • 3768.00 build of an order of	
			Advanced Mode OK Cancel	

**NOTE:** To select a group or a condition, you must click on the functions to apply or modify them. Additionally, click on the arrow of the orange value to select whether your filter should be applied to a value, a property, or a parameter, and build your filter.

# 4.1.3 Interactivity of the card

This icon allows you to modify the interactivity of the card with the master filter, enable data drilling, ignore master filters, and filter the data source, if applicable. **NOTE:** Please refer to points 4.2.3 and 4.3.3 for interactivity.

#### 4.1.4 Options of the card

This icon allows you to modify the options of the card.

#### "Options" section

This section allows you to modify the options within the card.

o **The option "Common"** allows you to show or hide the card legend, as well as modify the name of the card.

In this example, the legend has been hidden.

^	OPTIONS		×	
۵	COMMON			
-	SHOW CAPTION			
1	ON	OFF		
뫄	CAPTION			
8	Cards 1		-	3768.00 Quantity total of takes order
<b>1</b>	LAYOUT			
	CONDITIONAL FORMATTING			
	PREXTRA PROPERTIES			
	CONFIGURATION			

o **The option "Layout**" allows you to modify the content layout mode to either automatic or fixed rows or columns and specify the number of rows if you do not select "Auto".

o **The option "Conditional Formatting"** allows you to create specifications in the card. **NOTE:** Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

o The option "Prextra properties" allows you to add a Prextra label to the card.

o **The option** "**Configuration**" allows you to modify the width and height card, as well as the spacing when you have multiple cards.

#### 4.1.5 Convert the card

This icon allows you to convert the card into a different functionality.

#### 4.1.6 Remove the card

This icon allows you to remove the card.

#### 4.2 Pie chart

A pie chart allows you to display certain information in the form of pie slices.

# 4.2.1 Configure the pie chart

This icon allows you to configure the pie chart through a new dropdown menu.

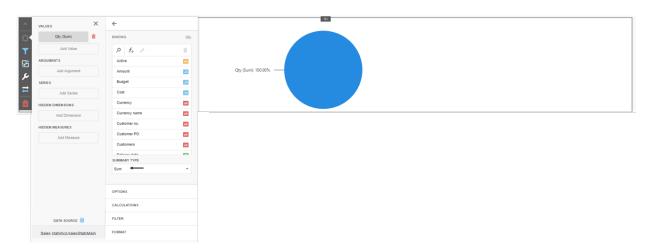


**NOTE:** The dropdown menu for configurations contains sections, each with its own different options.

"Values" section

This section allows you to add one or more values and configure them. Click the "Add Value" button to add a value. o The option "Binding" allows you to select the value to add.

In this example, the total quantity of orders has been added, and the data type has been changed to "Sum", displaying the sum of orders.



o The option "Options" allows you to rename the value.

In this example, the value has been renamed to "Sum of orders by salesperson".

^	VALUES	←	
<u>ې</u>	Sum of orders by salespe	BINDING City	
T	Add Value	OPTIONS	
	ARGUMENTS	CAPTION	
ት ዲ	Add Argument	Sum of orders by salesperson	Sum of orders by salesperson: 100.00%
	SERIE S		
$\rightarrow$	SENCES	CALCULATIONS	
≓	Add Series		
莭	HIDDEN DIMENSIONS	FILTER	
	Add Dimension	FORMAT	
	HIDDEN MEA SURES		
	Add Measure		
	DATA SOURCE		
	Sales statistics/salesStatsMain		

o The option "Calculations" allows you to modify the calculation type of the pie chart.

o The option "Filter" allows you to filter the pie chart using a filter editor.

**NOTE:** Please refer to points 4.2.1 and 4.2.2 for the filter editor.

o The option "Format" allows you to modify the format of the value in the pie chart.

In this example, the format type was changed to "Currency", the unit was changed to "Ones" and decimals were removed.

**NOTE:** The value format will be applied if you display them via the "Label" option in the pie chart tools.

^	VALUES	<del>&lt;</del>	
-Q-	Sum of orders by salespe	BINDING City	
T	Add Value	OPTIONS	
먚	ARGUMENTS	CALCULATIONS	
ير	Add Argument	FILTER	Sum of orders by salesperson: 100.00%
	SERIES	FILTER	
≓	Add Series	FORMAT Currency	
命	HIDDEN DIMENSIONS	FORMAT TYPE	
		Currency -	
	Add Dimension	UNIT	
	HIDDEN MEASURES	Ones 🔶 🔹	
	Add Measure	PRECISION	
		• 🔶 🗘	
		INCLUDE GROUP SEPARATOR	
		ON OFF	
	DATA SOURCE 🗮	CURRENCY	
	Sales statistics/salesStatsMain	Use client system settings *	

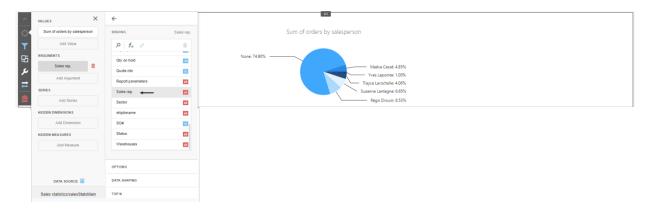
### "Arguments" section

This section allows you to add arguments to the pie chart.

An argument allows you to segment the pie chart by arguments.

o **The option "Reliure"** allows you to select an argument. When an argument is added, the pie chart will be segmented by it.

In this example, the pie chart is segmented by salesperson.



o The option "Options" allows you to rename the argument.

o The option "Data Shaping" allows you to display data according to different parameters.

^	VALUES X	<del>~</del>	
-Q-	Sum of orders by salesperson	BINDING Sales rep.	Sum of orders by salesperson
T	Add Value	OPTION S	
뫄	ARGUMENTS	DATA SHAPING	None 7430%
بو	Sales rep.	SORT ORDER	Maéva Cassé: 4.85%
Ę	Add Argument	Ascending Descending	Yves Lapointe 1.00% Trayce Larochelle 4.06%
-	SERIES	SORT BY	Successful and an end of the second s
亩	Add Series	(Value) *	Régis Drouine 8.53%
	HIDDEN DIMENSIONS	GROUP INTERVAL No Grouping Alphabetical	
	Add Dimension		
	HIDDEN MEASURES	COLORING	
	Add Measure	Auto Off On	
		TOPN	
	DATA SOURCE 🗮		
	Sales statistics/salesStatsMain		

o **The option "Top N"** allows you to restrict the data to display in the pie chart. In this example, the type was changed to "Bottom" to display equal sectors in the pie chart.

VALUES X	÷						
Sum of orders by salesperson	BINDING	Sales rep.	Sum of orders by salesperson				
Add Value	OPTIONS		Maéra Cassei 19.34%				
ARGUMENTS	DATA SHAPING		Trayce Larochelle: 16.19%				
Sales rep.	TOP N		Suzanne Lantagne: 26.49%				
SERIES	ENABLED ON	OFF					
Add Series	MODE	011	Régis Drouin: 33.99%				
HIDDEN DIMENSIONS	Тор	Bottom					
Add Dimension	COUNT						
HIDDEN MEASURES	0	\$					
Add Measure	MEASURE						
	Sum of orders by sales	person •					
	SHOW "OTHERS" VALUE						
DATA SOURCE 🛢	ON	OFF					
Sales statistics/salesStatsMain							

"Series" section

This section allows you to add series to the pie chart. A series allows you to create a pie chart for each separately selected series.

\_\_\_\_\_

o **The option "Binding"** allows you to select a series. When a series is added, the pie chart will be separated for each of them.

In this example, the pie chart is separated for each salesperson.

A VALUES X	÷					
VALUES	4					
Sum of orders by salesperson	BINDING Sale	rep.	Régis Drouin	Suzanne Lantagne	Trayce Larochelle	Yves Lapointe
Add Value		8				
ARGUMENTS						
Add Argument				Sum of orders by salespe 100.00%	Sum of orders by address by 100.00%	
SERIES		Sum of orders by salespe 100.00%	, _/			Sum of orders by
Sales rep.				100.00%		100.00%
		20				
Add Series	Sector	ab				
HIDDEN DIMENSIONS	shiptoname	ab				
Add Dimension	SO#					
HIDDEN MEA SURES	Status	<b>60</b>				
Add Measure	Warehouses					
	OPTIONS					
DATA SOURCE 🗎	DATA SHAPING					
Sales statistics/salesStatsMain	TOP N					

o The option "Options" allows you to rename the series.

o **The option "Data Shaping"** allows you to display data according to different parameters. **NOTE:** Please refer to the "Data Shaping" option in the "Series" section of point 4.1.1 of this document for an example of data shaping.

o **The option "Top N"** allows you to restrict the data to display in the pie chart. **NOTE:** Please refer to the "Top N" option in the "Arguments" section of point 4.2.1 of this document for an example of Top N.

# "Hidden dimensions" section

This section allows you to add hidden dimensions in the pie chart.

A hidden dimension allows you to add a dimension that affects the pie chart but will not be displayed to users in the dashboard.

In this example, the "Order Date" dimension has been added, allowing it to be used later in the pie chart filter.

**NOTE:** You will be able to modify the group type of the dimension, rename the dimension, shape the data, and modify the format of the dimension via the options provided. Please refer to the previous elements for its options.

VALUES	<del>~</del>		
Sum of orders by salesperson	BINDING	Order Date	Sum of orders by salesperson
Add Value		÷	Maéra Cassé: 19.34%
ARGUMENTS		-	Trayce Larochelle: 16.19%
Sales rep.	displaynext7days	OR	
6	displayred	12	Vves Lapointe: 4.00%
Add Argument	Division	-	Suzanne Lantagne 26.49%
SERIES	Due Date	0	Régis Drouin: 33.99%
Add Series	Held orders	-	rega alaan accaa
HIDDEN DIMENSIONS	Item code	45	
Order Date	Item Description	-	
Add Dimension	Note	-	
HIDDEN MEASURES	Order Date		
Add Measure	GROUP INTERVAL		
	Exact Date	-	
	OPTIONS		
DATA SOURCE 🛢	DATA SHAPING		
Sales statistics/salesStatsMain	FORMAT		

Additionally, in this example, a date filter has also been added to filter the "Number of orders" value according to the parameters entered in the "From Date" and "To Date" parameters of the dashboard.

#### "Hidden measures" section

This section allows you to add hidden measures to the pie chart.

A hidden measure allows you to add a measure that affects the pie chart but will not be displayed to users in the dashboard.

**NOTE:** This functionality is not explained in this document.

#### 4.2.2 Filter the pie chart

This icon allows you to filter the pie chart using a filter editor.

To create a filter, click on the pencil icon of the "Filter" option to open the filter editor.

In this example, the pie chart will no longer display orders with no salesperson and will only

show orders with the order date in 2024.

**NOTE:** The "Order Date" condition comes from a hidden dimension.

^	FILTERS X	Filter Editor	×	
۵	ITEM FILTER ON	Not And		Sum of orders by salesperson
	/ 8	Sales rep. Equals None +		Maéva Cassé: 19.34% Trayce Larochelle: 16.19%
記 シ 1	Not[[Sales rep.] = 'None' And [Order Date] > #2024-01-01#) VISIBLE DATA FICTER	Order Date is greater than 01/01/2024 +		Suzanne Lantagne: 26.49%
		Advanced Mode	OK Cancel	

Additionally, in this example, a date filter has also been added to filter the "Number of orders" value according to the parameters entered in the "From Date" and "To Date" parameters of the dashboard.

### 4.2.3 Interactivity of the pie chart

This icon allows you to apply master filter modes, enable data drilling, ignore master filters, and filter the data source if applicable.

In this example, drilling has been added to all master filters, allowing users to click on a sector to filter the dashboard.

 11 ४ 🖉 🕇 🔅	INTERACTIVITY MASTER FILTER MODE None Single DRILL DOWN ON ON TARGET DIMENSION S Arguments Series	Multple OFF Points	Sum of orders by salesperson Maeva Casse: 19.34% Suzanne Lantagne: 26.49% Vives Lapointe: 4.00%
â	IGNORE MASTER FILTERS	OFF	Régis Drowin: 33.99%
	CROSS-SOURCE FILTERIN		

# 4.2.4 Options of the pie chart

This icon allows you to modify the options of the pie chart.

### "Options" section

This section allows you to modify the options of the pie chart.

o The option "Style" allows you to display the pie chart using the style.
In this example, the title of the pie chart has been removed from the "Caption" field.
NOTE: The title of the chart is still positioned at the top right of the functionality.

^	OPTIONS	×	
	STYLE		Sum of orders by salesperson Matha Case 19345
멾	COMMON SHOW CAPTION		Trayce Larachelle: 16.19% Vies Lapointer 4.00%
	ON	OFF	Suzanne Lantagne 26.49%
=	CAPTION		
亩	Pies 1		Régis Droxin 33.89%
	SHOW PIE CAPTIONS	OFF	
	ON	OFF	
	LAYOUT		
	LABELS		
	COLORING		
	COLOR SCHEME		
	PREXTRA PROPERTIES		
	CONFIGURATION		

o **The option "Common"** allows you to show or hide the legend of the pie chart, as well as modify the label of the pie chart.

o **The option** "**Layout**" allows you to modify the content layout mode to either automatic or fixed rows or columns and specify the number of rows if you do not select "Auto".

o **The option "Labels"** allows you to modify the data display, tooltips, and label position. In this example, the data value is displayed inside the pie chart, and no tooltips will be available in the pie chart.

^	OPTIONS	×	
۵	LABELS		Sum of orders by salesperson
	DATA LABELS		
T	None		1.206+4
뫄	Argument		
8	Percent		1841+4 - 2.488+3
≓	Argument And Percent		104544
-	Value		2,116+4
	Argument And Value		
	Value And Percent		
- 1	Argument, Value And Percent		
- 1	TOOLTIPS		
_	None		
- 1	Argument		
- 1	Percent		
- 1	Argument And Percent		
- 1	Value		
- 1	Argument And Value		
- 1	Value And Percent	- 1	
- 1	Argument, Value And Percent		
- 1	DATA LABELS POSITION		
- 1	Outside Inside		

o The option "Coloring" allows you to modify the coloring of the pie chart, if needed.

o The option "Color Scheme" allows you to modify the color set of each of the sectors.

o The option "Prextra Properties" allows you to add a Prextra label to the pie chart.

o **The option "Configuration**" allows you to modify the size and color of the font labels as well as the background of the labels and to display the legend of the pie chart. In this example, the legend has been added.

^ \$	OPTIONS X	Sum of orders by salesperson
<b>▼</b> ₽3	COMMON	100E-4 Vies Lapointe
1	LAYOUT	1.64E+4 2.48E+3 Marka Casé 1.64E+4 Pagis Dowin
=	LABELS	2.116-4
	COLORING COLOR SCHEME	
	PREXTRA PROPERTIES	
	CONFIGURATION LABELS' FONT SIZE	
	12px	
	EABELS COLOR	
	LABELS' BACKGROUND COLOR	
	SHOW LEGEND	
	ON OFF	

# 4.2.5 Convert the pie chart

This icon allows you to convert the pie chart into a different functionality.

4.2.6 Remove the pie chart

This icon allows you to remove the pie chart.

#### 4.3 Bar chart

A bar chart allows you to display certain information in the form of bars.

#### 4.3.1 Configure the bar chart

This icon allows you to configure the bar chart via a new dropdown menu.

~	at ×	
224	VALUES	
	Add Values	
	ARGUMENTS	
	Add Argument	db db
۶	SERIES	Chart
≓	Add Series	Click here to brind this ten to data
曲	HIDDEN DIMENSIONS	
	Add Dimension	
	HIDDEN MEASURES	
_	Add Measure	
	DATA SOURCE 🗮	
	Sales statistics/salesStatsMain	

**NOTE:** The dropdown menu for configurations contains sections, each with its own different options.

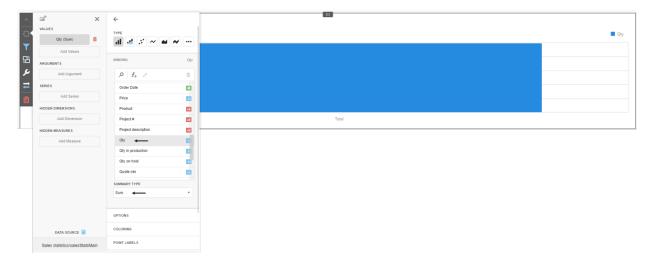
"Values" section

This section allows you to add one or more bands and configure them. Click the "Add Values" button to add a value.

o **The option "Type"** allows you to select the type of bar chart to display. Click on the three small dots icon to access other types of display.

o The option "Binding" allows you to select the value to add.

In this example, the quantity of orders has been added, and the data type has been changed to "Sum", displaying the sum of orders.



o **The option "Options"** allows you to rename the bar chart and modify the horizon of the secondary axes.

In this example, the vertical band has been renamed to "Amount of orders by salesperson".

^	a*	×	÷		
Q.	VALUES		TYPE		Amount of orders by salesperson
T	Amount of orders by sale	÷.	레 레 강 ~ ▲ * …		Amount of orders by salesperson
	Add Values				
뫄	ARGUMENTS		BINDING City	Total Amount of orders by salesperson: \$247K	
ىر	Add Argument		OPTIONS		
≓	SERIE S		CAPTION		
命	Add Series		Amount of orders by salesperson		
ш,	HIDDEN DIMENSIONS		PLOT ON SECONDARY AXIS		
	Add Dimension		ON OFF	Total	
	HIDDEN MEA SURES		COLORING		
- 1	Add Measure		POINT LABELS		
			CONDITIONAL FORMATTING		
			CALCULATIONS		
	DATA SOURCE 🛢		FILTER		
	Sales statistics/salesStatsN	fain	FORMAT		

o The option "Coloring" allows you to modify the measures to color.

o **The option** "**Points Labels**" allows you to display the content of arguments, series, and/or values in the bar chart, modify the overlap mode, change the orientation of displayed data, show or hide null values, and modify the position of displayed data.

In this example, the bar chart value has been added inside the band.



o **The option "Conditional Formatting"** allows you to create specifications for the bar chart. Click on the add icon to add conditional formatting.

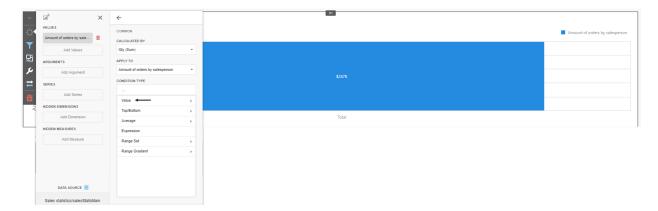
< at	×	←		
VALUES		TYPE		Amount of orders by salesperson
Amount of orders by sale	÷ .			Amount of orders by salesperson
Add Values				
ARGUMENTS		BINDING Qty		
Add Argument		OPTIONS	\$247K	
SERIES		COLORING		
Add Series		POINT LABELS		
HIDDEN DIMENSIONS		CONDITIONAL FORMATTING		
Add Dimension			Total	
HIDDEN MEA SURES		+ /   + + =		
Add Measure				
		CLICK + TO ADD A NEW ITEM.		
		CALCULATIONS		
DATA SOURCE 🛢		FILTER		
Sales statistics/salesStatsMa	in	FORMAT		

In this example, a condition will be added to the band to display it in green when the customer account is over \$10,000.

By adding conditional formatting, a new section will allow you to modify the calculation type, apply changes to the desired value, and add a condition on the value.

^	a* :	×	<del>~</del>			
-0-	VALUES		COMMON			Amount of orders by salesperson
-	Amount of orders by sale	5	CALCULATED BY			
	Add Values		Qty (Sum)	•		
웃	ARGUMENTS	RGUMENTS	APPLY TO			
ىتر	Add Argument		Amount of orders by salesperson	•		
≓	SERIES		CONDITION TYPE			
-	Add Series					
	HIDDEN DIMENSIONS		Value	•		
<	Add Dimension		Top/Bottom	•	Total	
			Average Expression	•	num	
	HIDDEN MEASURES					
- 1	Add Measure		Range Set	•		
			Range Gradient	•		
	DATA SOURCE 🥃					
	Sales statistics/salesStatsMair	n				

The "Common" option allows you to select the desired parameter and add a condition to it. In this example, the condition is added to the "Value", so select "Value" in the "Condition type" section.



By selecting a condition, you will be able to determine a condition type on it. In this example, the condition type is "Greater than".

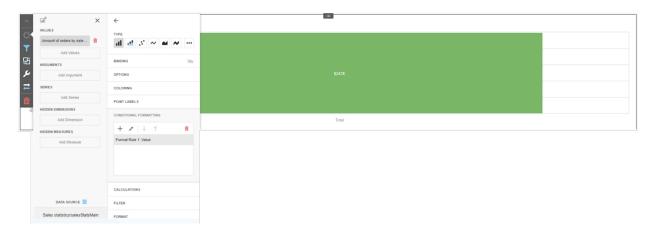
^	at .	×	←	
0	VALUES		COMMON	Amount of orders by salesperson
-	Amount of orders by sale	Ê	CALCULATED BY	
	Add Values		City (Sum) •	
뫄	ARGUMENTS		APPLY TO	
يو	Add Argument		Amount of orders by salesperson -	1247K
=	SERIE S		CONDITION TYPE	324/K
_	Add Series		/ Value	
	HIDDEN DIMENSIONS		Greater Than	
, A	Add Dimension		Greater Than Or Equal To	Total
	Add Dimension		Less Than	lotal
	HIDDEN MEASURES		Less Than Or Equal To	
	Add Measure		Equal To	
			Not Equal To	
			Between	
			Not Between	
	DATA SOURCE		Between Or Equal To	
			Not Between Or Equal To	
	Sales statistics/salesStatsMa	ain		

By selecting the condition type, the "Condition" option allows you to determine the condition parameters.

In this example, the band will be displayed in green if the value is greater than \$10,000.



**NOTE:** You will be able to modify the label of the condition and enable or remove the condition through the "Legend" and "Miscellaneous" options. Once the condition has been added, click on the arrow to return to the "Conditional Formatting" section, and the condition will be available for modification. It is possible to add multiple conditional formats.

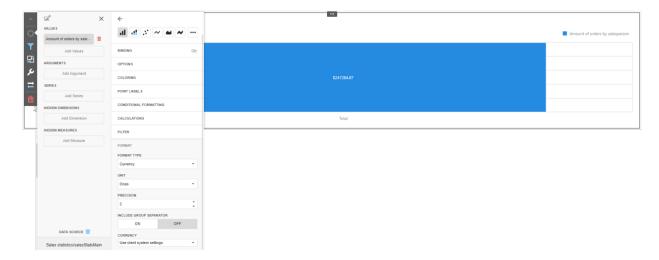


**NOTE:** In this document, conditional formatting has been removed for the following point.

o The option "Calculations" allows you to modify the data display in the bar chart.

o **The option** "**Filter**" allows you to add a filter for the value in the bar chart using a filter editor. **NOTE:** Please refer to points 4.2.1 and 4.2.2 for the filter editor.

o **The option "Format"** allows you to modify the format of the value displayed in the bar chart. In this example, the format has been changed to "Currency" to display the precise value of order amounts.



# "Arguments" section

This section allows you to add arguments to the bar chart. An argument segments the bar chart by arguments.

o **The option "Binding"** allows you to select an argument. When an argument is added, the bar chart will be segmented by it. In this example, the bar chart is segmented by salesperson.

						_				
~ G	at ×	←								
80K	ALUES	BINDING	Sales rep.							Amount of orders by salesperson
-	Amount of orders by salesperson	P f+ /	-							
	Add Values		_							
	ARGUMENTS	Oty on hold	-25							
۶	Sales rep.	Quote nbr	12							
=	Add Argument	Report parameters	45	96						
<u>_</u>	SERIES	Sales rep.	ab							
	Add Series	Sector	ab						_	
	IDDEN DIMENSIONS	shiptoname	ab		Régis Dro	ouin	Suzanne Lantagne	Trayce Larochelle		Yves Lapointe
	Add Dimension	SO#	14							
	IDDEN MEA SURES	Status	ab							
н	Add Measure	Warehouses	ab							
	Audinieasure									
		OPTIONS								
		DATA SHAPING								
	DATA SOURCE 🧮	CONDITIONAL FORMATTING								
	Sales statistics/salesStatsMain	TOP N								

o The option "Options" allows you to rename the argument.

o **The option "Data Shaping"** allows you to display data according to different parameters. **NOTE:** Please refer to the "Data Shaping" option in the "Series" section of point 4.1.1 of this document for an example of data shaping.

o **The option "Conditional Formatting"** allows you to create specifications in the bar chart. **NOTE:** Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

o **The option "Top N"** allows you to restrict the data to display in the bar chart. **NOTE:** Please refer to the "Top N" option in the "Arguments" section of point 4.2.1 of this document for an example of Top N.

"Series" section

This section allows you to add series to the bar chart. A series allows you to create a bar chart for each selected series separately.

o **The option "Binding"** allows you to select a series. When a series is added, the bar chart will be separated for each of them. In this example, the bar chart is separated for each salesperson.

$\sim$	a⁺ ×	÷			1							
Ó.	VALUES	BINDING	Sales rep.				Maéva Cassé	None	Régis Drouin	Suzanne Lantagne	Trayce Larochelle	Yves Lapointe
Ŧ	Amount of orders by salesperson	P f+ 0	8		-							
<u>.</u>	Add Values		-									
2	ARGUMENTS	Qty on hold	-25									
ىر	Add Argument	Quote nbr	12									
=	SERIE S	Report parameters	ab	\$185216.96								
-	Sales rep.	Sales rep.	-	-								
ш.,	Add Series	Sector	ab						_			
4	HIDDEN DIMENSIONS	shiptoname	ab			Total						
	Add Dimension	SO#	12									
		Status	ab									
	HIDDEN MEASURES	Warehouses	ab									
	Add Measure											
		OPTIONS										
		DATA SHAPING										
	DATA SOURCE 블	CONDITIONAL FORMATTING										
	Sales statistics/salesStatsMain	TOP N										

o The option "Options" allows you to rename the series.

o **The option "Data Shaping"** allows you to display data according to different parameters. **NOTE:** Please refer to the "Data Shaping" option in the "Series" section of point 4.1.1 of this document for an example of data shaping.

o **The option "Conditional Formatting"** allows you to create specifications in the bar chart. **NOTE:** Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

o **The option "Top N"** allows you to restrict the data to display in the bar chart. **NOTE:** Please refer to the "Top N" option in the "Arguments" section of point 4.2.1 of this document for an example of Top N.

"Hidden dimensions" section

This section allows you to add hidden dimensions in the bar chart.

A hidden dimension allows you to add a dimension that affects the bar chart but will not be displayed to users in the dashboard.

**NOTE:** Please refer to the "Hidden Dimensions" option in the "Values" section of point 4.2.1 of this document for an example of hidden dimension.

#### "Hidden measures" section

This section allows you to add hidden measures to the bar chart.

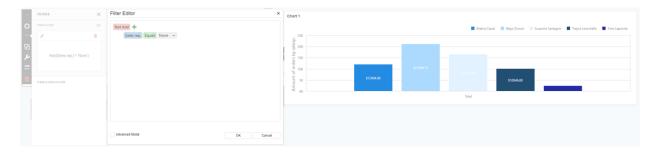
A hidden measure allows you to add a measure that affects bar chart but will not be displayed to users in the dashboard.

NOTE: This functionality is not explained in this document.

### 4.3.2 Filter the bar chart

This icon allows you to filter the bar chart using a filter editor.

To create a filter, click on the pencil icon of the "Filter" option to open the filter editor. In this example, the bar chart will no longer display orders with no salesperson.



Furthermore, in this example, a date filter has also been added to filter the "Number of orders" value according to the parameters that will be entered in the "From date" and "To date" parameters of the dashboard.

#### 4.3.3 Interactivity of the bar chart

This icon allows you to apply master filter modes, enable drilling down into data, and override master filters and filter the data source, if applicable.

In this example, drilling down has been added to all master filters, allowing users to click on a band to filter the dashboard.

INTERACTIVITY X				
None Single Multiple				📕 Maéva Cassé 📃 Régis Drouin 🗏 Suzanne Lantagne 📕 Trayce Larochelle 📕 Vies Lapointe
DRILL DOWN				
Arguments Series Points	\$12004.06			\$10046.80
ON OFF			Total	
CROSS-DATA-SOURCE FILTERING				
	MASTER PLICER NOCE None PRUL CONN ON TRACE TORENSION FAROMETING Series Plants CON OFF CON OFF CON COFF CON COFF CON COFF CON COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF COFF	MASTER ILITER MODE           None         Single         Multiple           DRUL DOWN         OFF           TARGET COMPRISIONS         OFF           Universities         Safets         Points           DIGUES MASTER ILITERS         S12004.06	MASTER ILTER MODE Nore Single Multiple DRUL CORN ON OFF TARGET CORRENANCE Series Points DIGORE MASTER ILTER S ON OFF	INTERACTIVITY X MASTER INTER MODE Nove Suge Multiple DRILLCOVN ON OFF Apguments Steles Parts Steles Parts ON OFF OFF Steles Total

#### 4.3.4 Options of the bar chart

This icon allows you to modify the bar chart options.

#### "Options" section

This section allows you to modify the bar chart options.

o **The option "Common"** allows you to show or hide the bar chart legend, as well as modify the bar chart label.

In this example, the bar chart has been renamed to "Orders by Salesperson \$".

	OPTIONS X	Orders by salesperson \$
¢ •	COMMON SHOW CAPTION	Notes Casse Englis Dravin Statewe Landone E Trypt Landone T Trypt Landone E Trypt Landone E Trypt Landone T Trypt Landone
₽3 >∕ 11	ON OFF CAPTION Orders by salesperson 5 ROTATED	5 204 5 100 5 100 1 10004.00 1 10004.00
⊷ ش	ON OFF	R C Trad
	AXIS X AXIS Y	
	LEGEND	
	CONDITIONAL FORMATTING	
	COLORING	
	COLOR SCHEME	
	PREXTRA PROPERTIE 5	

o **The option "Axis X"** allows you to modify the information displayed on the X-axis of the bar chart as well as change the format of the displayed data type.

o **The option "Axis Y"** allows you to modify the information displayed on the Y-axis of the bar chart as well as change the format of the displayed data type.

o **The option "Legend"** allows you to show or hide the legend and display it inside or outside the bar chart, as well as modify the position of the legend.

_			_					
^	OPTIONS	×						
$\diamond$	COMMON							📕 Maéva Cassé 🛛 Régis Drouin 📄 Suzanne Lantagne 📕 Trayce Larochelle 📕 Yves Lapointe
T	AXIS X							
뫄	AXIS Y				-			
1	LEGEND						_	
=	SHOW LEGEND			\$12004.06				\$10046.80
	YES	NO						
茴	INSIDE DIAGRAM					Total		
	YES	NO						
	POSITION							
	Top Right Horizontal	•						
	CONDITIONAL FORMATTI	NG						
	COLORING							
	COLOR SCHEME							
	PREXTRA PROPERTIES							

o **The option "Conditional Formatting"** allows you to create specifications in the bar chart. **NOTE:** Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

o **The option "Coloring"** allows you to modify the coloring of the bands.

∧ OPTIONS	×							
COMMON					Maéva Cassé	Régis Drouin Suzanne Lantagne	Trayce Larochelle	Yves Lapointe
AXIS X								
AXIS Y		_						
LEGEND			\$21094.75					
CONDITIONAL FORMATTING	\$120	04.06			\$10046.80			
COLORING				Total				
SERIES - SALES REP.								
Auto Off On								
MEA SURES COLORING								
Auto Off On								
COLOR SCHEME								
PREXTRA PROPERTIES								

o The option "Color scheme" allows you to modify the color scheme of each of the bands.

^	OPTIONS	×					
\$	COMMON				Maéva Cassé	Régis Drouin 🛛 Suzanne Lantagne	Trayce Larochelle Vves Lapointe
T	AXIS X						
뫄	AXIS Y						
50	LEGEND						
≓	CONDITIONAL FORMATTING	5	\$12004.06		\$10046.80		
茴	COLORING			Total			
	COLOR SCHEME						
	Q. Search						
	Maéva Cassé	Ø					
	None	Ø					
	Règis Drouin	Ø					
	Suzanno Limborno	Ø					
	Trayce Larochelle	Ø					
	Yves Lapointe	Ø					
	COLOR SCHEME TYPE						
	Global	Local					
	PREXTRA PROPERTIES						

o The option "Prextra Properties" allows you to add a Prextra label to the bar chart.

# 4.3.5 Convert the bar chart

This icon allows you to convert the bar chart into a different functionality.

#### 4.3.6 Remove the bar chart

This icon allows you to remove the bar chart.

#### 4.4 Pivot

A pivot allows you to display certain information in pivot table form.

# 4.4.1 Configure the pivot

This icon allows you to configure the pivot via a new dropdown menu.

VALUES X
Add Value
COLUMNS
Add Column
Rows
Add Row
HIDDEN DIMENSION S
Add Dimension
HIDDEN MEA SURES
Add Measure
DATA SOURCE 🛢
Sales statistics/salesStatsMain

**NOTE:** The dropdown menu for configurations contains sections, each with its own different options.

"Values" section

This section allows you to add one or more values and configure them. Click the "Add value" button to add a value.

o **The option "Binding"** allows you to select the value to display. In this example, the order amount has been added with a type of "Sum".



o **The option "Options"** allows you to modify the label of the value and show or hide values, totals, and grand totals.

o **The option "Conditional Formatting"** allows you to create specifications in the pivot. **NOTE:** Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

o The option "Calculations" allows you to modify the calculation type of the pivot.

o **The option "Filter"** allows you to add a filter for the value in the pivot using a filter editor. **NOTE:** Please refer to points 4.2.1 and 4.2.2 for the filter editor.

o **The option "Format"** allows you to modify the format of the values displayed in the pivot. In this example, the format has been changed to "Currency" with 2 decimals to display the precise value of order amounts.



# "Columns" section

This section allows you to add columns to the pivot. A column helps to segment the pivot by columns.

o **The option "Binding"** allows you to select a column. When a column is added, the pivot will be segmented by it. In this example, the pivot is segmented by salesperson.



o The option "Options" allows you to rename the column.

o **The option "Data Shaping"** allows you to display data according to different parameters. **NOTE:** Please refer to the "Data Shaping" option in the "Series" section of point 4.1.1 of this document for an example of data shaping.

o **The option "Conditional Formatting"** allows you to create specifications in the columns. **NOTE:** Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

o **The option "Top N"** allows you to restrict the data to display in the pivot.

**NOTE:** Please refer to the "Top N" option in the "Arguments" section of point 4.2.1 of this document for an example of Top N.

"Rows" section

This section allows you to add one or more rows and configure them.

o **The option "Binding"** allows you to select data by row. When a row is added, the pivot will be displayed by it. In this example, each customer is displayed by rows.

X	<i></i>						
Amount (Sum)	BINDING	Customers	Régis Drouin	Suzanne Lantagne	Trayce Larochelle	Yves Lapointe	Grand Total
			\$1045624.29		\$15416.62	\$200000.00	\$317262
Add Value	<i>P f</i> <sub>+</sub> <i>ℓ</i>	÷ .	\$42409.50		\$420.20		\$413
COLUMNS	Customer PO	-	\$39127.65		\$490.43	\$0.00	\$3972
Sales rep.	Customers						
Add Column	Delivery date		\$45413.43		\$30977.98		\$8869
ROWS	Discount		\$9679.65	\$606231.30	\$17814.41	\$167372.08	\$120336
Customers			\$23720.00 \$5236.93			\$9800.00	\$3983. \$523
Add Row	displaynex17days	30	30230.93				302.
	displayred						
HIDDEN DIMENSIONS	Division	40					
Add Dimension	Due Date	٥					
HIDDEN MEASURES	Held orders	ab					
Add Measure							
	OPTIONS						
	DATA SHAPING						
DATA SOURCE 🧮	CONDITIONAL FORMATTING						
Sales statistics/salesStatsMain	TOP N						

o The option "Options" allows you to rename the rows title.

o **The option "Data Shaping"** allows you to display data according to different parameters. **NOTE:** Please refer to the "Data Shaping" option in the "Series" section of point 4.1.1 of this document for an example of data shaping.

o **The option "Conditional Formatting"** allows you to create specifications in the rows. **NOTE:** Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting. o The option "Top N" allows you to restrict the data to display in the pivot.

**NOTE:** Please refer to the "Top N" option in the "Arguments" section of point 4.2.1 of this document for an example of Top N.

"Hidden dimensions" section

This section allows you to add hidden dimensions in the pivot.

A hidden dimension allows you to add a dimension that affects the pivot but will not be displayed to users in the dashboard.

**NOTE:** Please refer to the "Hidden Dimensions" option in the "Values" section of point 4.2.1 of this document for an example of hidden dimension.

"Hidden measures" section

This section allows you to add hidden measures to the pivot.

A hidden measure allows you to add a measure that affects the pivot but will not be displayed to users in the dashboard.

NOTE: This functionality is not explained in this document.

# 4.4.2 Filter the pivot

This icon allows you to create a filter for the value in the pivot using a filter editor. In this example, a date filter has been added to filter the "Number of orders" value according to the parameters entered in the "From date" and "To date" parameters of the dashboard. **NOTE:** Please refer to points 4.2.1 and 4.2.2 for the filter editor.

# 4.4.3 Interactivity of the pivot

This icon allows you to ignore master filters. **NOTE:** Please refer to sections 4.2.3 and 4.3.3 for interactivity.

# 4.4.4 Options of the pivot

This icon allows you to modify the pivot options.

"Options" section

This section allows you to modify the options of the pivot.

o **The option "Common"** allows you to display or hide the legend, as well as modify the pivot label.

In this example, the pivot has been renamed to "Orders by Customer \$".

CORDINAL FORMULA  CONTINUE  CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINUE CONTINU	OPTIONS	×	Orders by Cust	tomer \$						
ö	COMMON			Maéva Cassé	None	Régis Drouin	Suzanne Lantagne	Trayce Larochelle	Yves Lapointe	Grand Total
Ť			Alphabet et nouilles	\$2.00	\$111586.13	\$1045624.29		\$15416.62	\$200000.00	\$3172629.04
<b>—</b>			B-Bolduc Inc.		-\$1432.00	\$42409.50		\$420.20		\$41397.70
CONSIGN CONSIGN CONSIGNATIONS CONSIGNATIONS CONSIGNATIONS CONSIGNATIONS CONSIGNATIONS PRESTAR PROPERTIES		Bénéva - Assurances		\$103.40	\$39127.65		\$490.43	\$0.00	\$39721.48	
			Café et biscotte	\$11416.00	\$892.50	\$45413.43		\$30977.98		\$88699.91
=	LAYOUT		CDID' INC	\$399477.16	\$2787.74	\$9679.65	\$605231.30	\$17814.41	\$167372.08	\$1203362.34
COMMON			CLI1	\$1070.00	\$5242.74	\$23720.00			\$9800.00	\$39832.74
-	INITIAL STATE		CUS			\$5236.93				\$5236.93
	CONDITIONAL FORMATTING									
	PREXTRA PROPERTIES									
	CONFIGURATION									

o **The option "Layout"** allows you to modify the layout of the pivot, as well as the column and row totals, column, and row grand totals, and to change the position of the columns, as well as to modify the position of the values.

o The option "Initial State" allows you to apply automatic grouping of column and row groups.

o **The option "Conditional Formatting"** allows you to create specifications in the pivot. **IMPORTANT:** Conditional formatting for pivots is not functional at the moment.

o The option "Prextra Properties" allows you to add a Prextra label to the pivot.

o **The option** "**Configuration**" allows you to configure other information for values, columns, and arguments.

# 4.4.5 Convert the pivot

This icon allows you to convert the pivot into a different functionality.

4.4.6 Remove the pivot

This icon allows you to remove the pivot.

# 5. Dashboard

When your dashboard is completed in the designer, you will be able to view it in the "My Dashboards" option in the "Management" menu of the "Options-User" module.

It is also possible to view it upon logging in Prextra.

To do this, navigate to your Prextra preferences via the "Preferences" option in the "Management" menu of the "Options-User" module and in the "Home Page" field, select "My dashboards".

Your authorized dashboards will then be displayed when you will log in Prextra.

		Sales ord	er Dashbo	ard						0 7 8
3758 Quantity total of sales order	<b>3993563,47 \$</b> Total amount of orders	Si	6 ilesperson		N	3758 Imbers of custom	iers	97 Disc		
			Orders by C	ustomer \$						
Course of a selection				None	Maéva Cassé	Règis Drouin	Suzanne Lantagne	Trayce Larochelle	Yves Lapointe	Grand Tota
Sum of orde	ers by salesperson		Alphabet et nouilles	111586,13 \$	2,00 \$	1045624,29 \$		15416,62 \$		1172629.)
		Yves Lapointe	B-Bolduc Inc.	-1432.00 \$		42409,50 \$		420,20 \$		41397
3	12004 \$10047	Trayce Larochelle Maéva Cassé	Bénéva - Assurances	103,40 S		39127,65 \$		490,43 \$	0,00 \$	39721
	\$10047	Suzanne Lantagne	Café et biscotte	892,50 \$	11416,00 \$	45413,43 \$		30970,98 \$		88692
\$16439	57.81	Régis Drouin	CDID' INC	2787,74 \$	398580,43 \$	9679,65 \$	606231,30 \$	17814,41 \$	167372,08 \$	1202465
210427			CLI1	5242,74 \$	1070,00 \$	23720,00 \$			9800,00 \$	39832
	\$21095		CLI2			5236,93 \$				5236
			CLI3	2952,83 \$		72091,65 \$			1580,00 \$	76624
			CL14	2610,82 \$		25761,10 \$				28371,
			Client 91529			9275,00 \$				9275
rders by salesperson \$			Client compte à compte	2524,11 \$	1355,00 \$	350,75 \$		14,75 \$	77,25 \$	4321
	Maéva Cassé 📃 Régis Drouin 📃 Suzanne Lantagne 📕 Tray	ce Larochelle 🛛 📕 Yves Lapointe	Client Comptoir	6037,28 \$	220,00 \$	1087,00 \$			966,28 \$	8310,
25K			Client comptoir de facturation	2775,36 \$		1383,23 \$				4158
20K			Client comptoir sans taxe	8152,84 \$	37797,25 \$				1560,00 \$	47510
S 15K			Client US non taxable	5286,82 <b>S</b>	2254,00 \$	6385,36 <b>S</b>			2277,25 \$	16203
of orders by sales	21094.75.8		Comptoir St- Fabien	50,00 \$		18705,00 \$				18755
	16439,00 \$		Dulac & cie	6096,44 S	25571,10 \$	560831,14 \$	152,00 S	3,60 \$	227,00 \$	592881
12042,06 \$	10045.80 \$		Europe Candy	286,94 \$	100,00 \$			108876,00 \$	150,00 \$	109412
12042,06 \$		462,30 \$	FAMOUS DESSERTS INC.	187309,75 <b>S</b>		2,00 \$		3540,00 \$	150,00 <b>\$</b>	191001,
200	Total		Folies au caramel		24538,66 \$	12140,65 \$				36679,

For any questions regarding this new feature, please refer to your project manager or to our customer support.