Prextra documentation

Prextra

ERP Solution Adapted to your Operations

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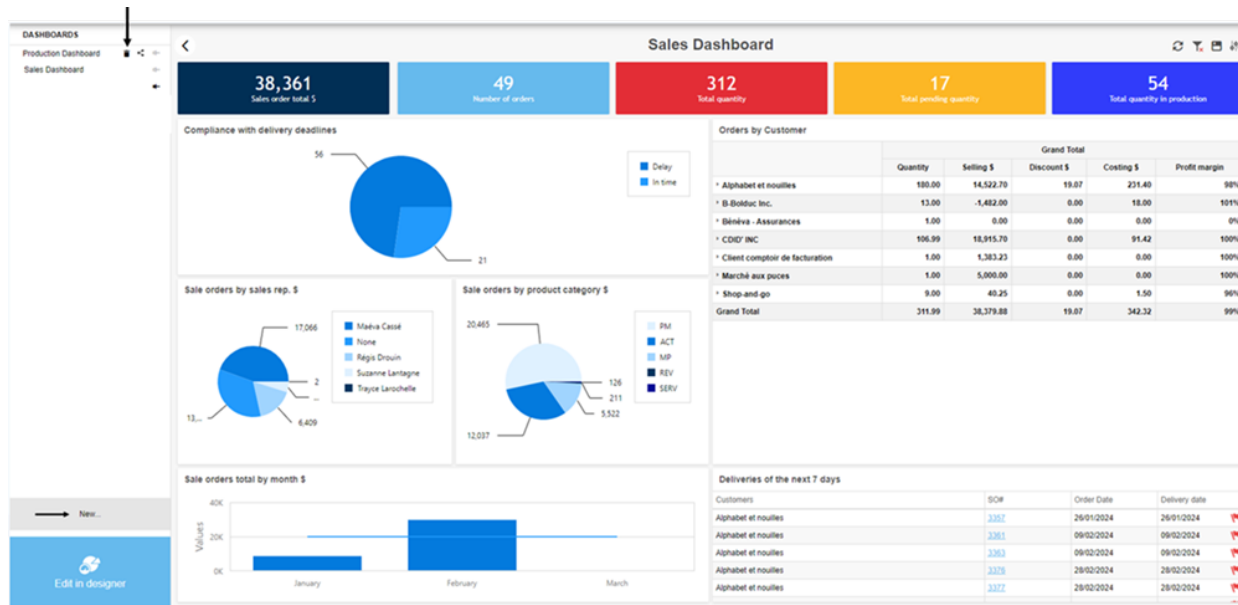
NOTE: Dashboards that you have previously created will be available for editing again via an "Edit in designer" button, if needed.

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.
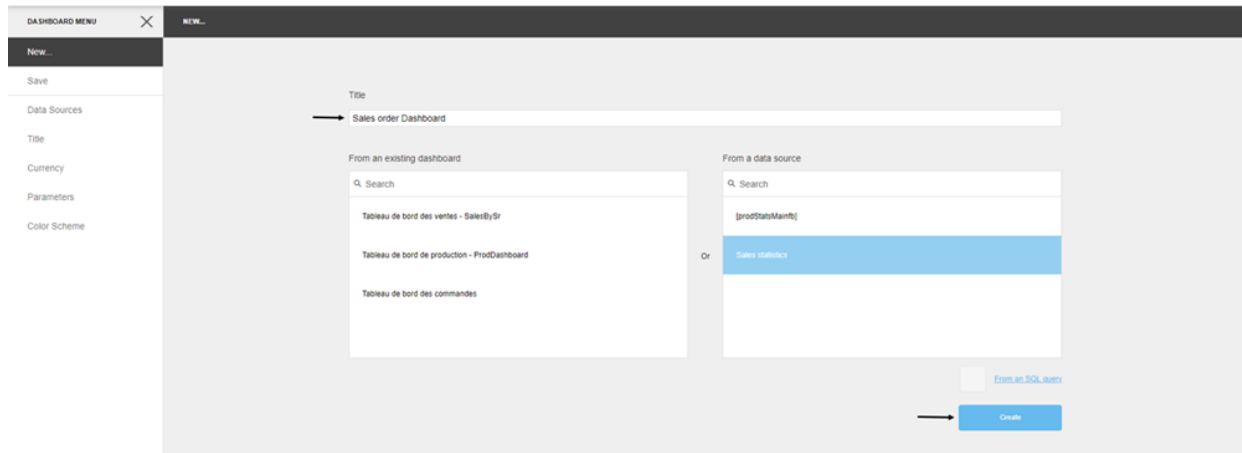
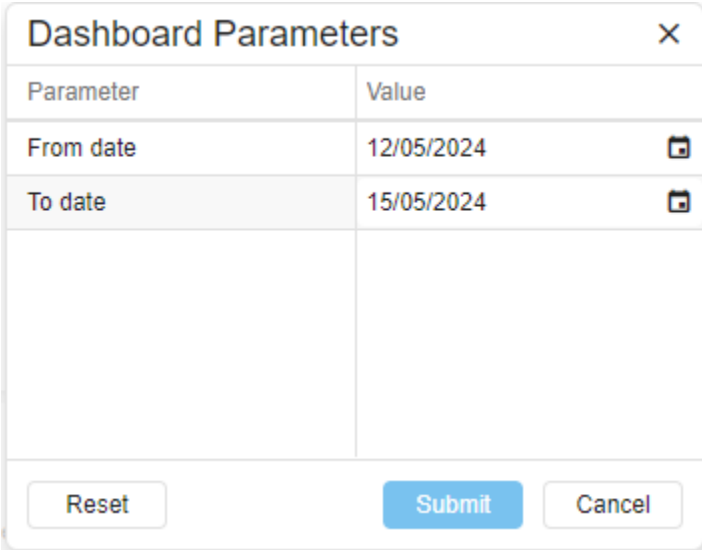**NOTE:** It is also possible to create a dashboard from an SQL query. To do so, you need to click on the link "From an SQL query" above the "Create" button. To create dashboards from SQL queries, please submit a request to our Technical team so that we can create your data source and assign you the 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.
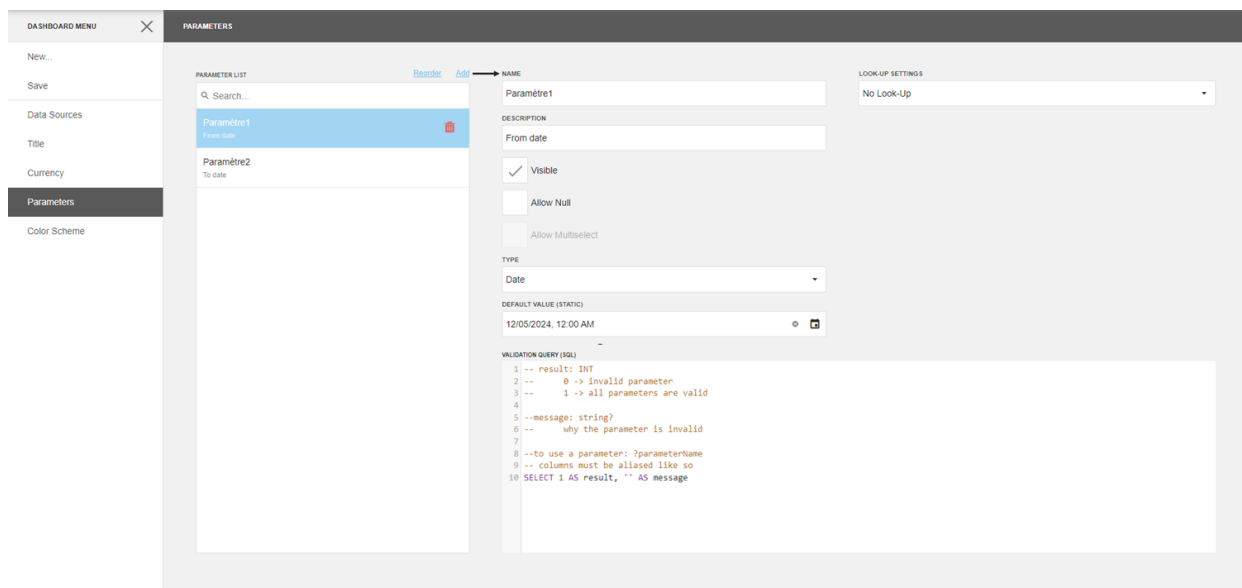
When the parameters will be added, they can be applied to the dashboard and used via the icon " ⚙ " at the top right of the dashboard.

Dashboard Parameters		✕
Parameter	Value	
From date	12/05/2024	📅
To date	15/05/2024	📅

Reset   Submit   Cancel

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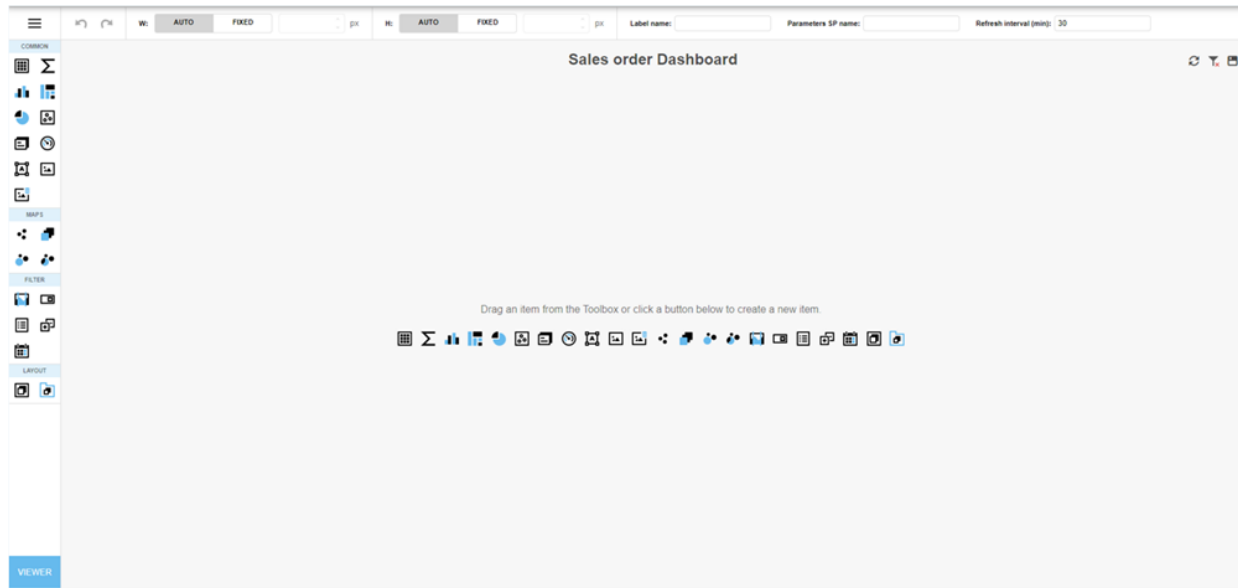
**NOTE:** During any modification in the dashboard designer, you will be able to use the return and progress icons to revert changes. Additionally, remember to save the modifications. Click on the menu, then select "Save".

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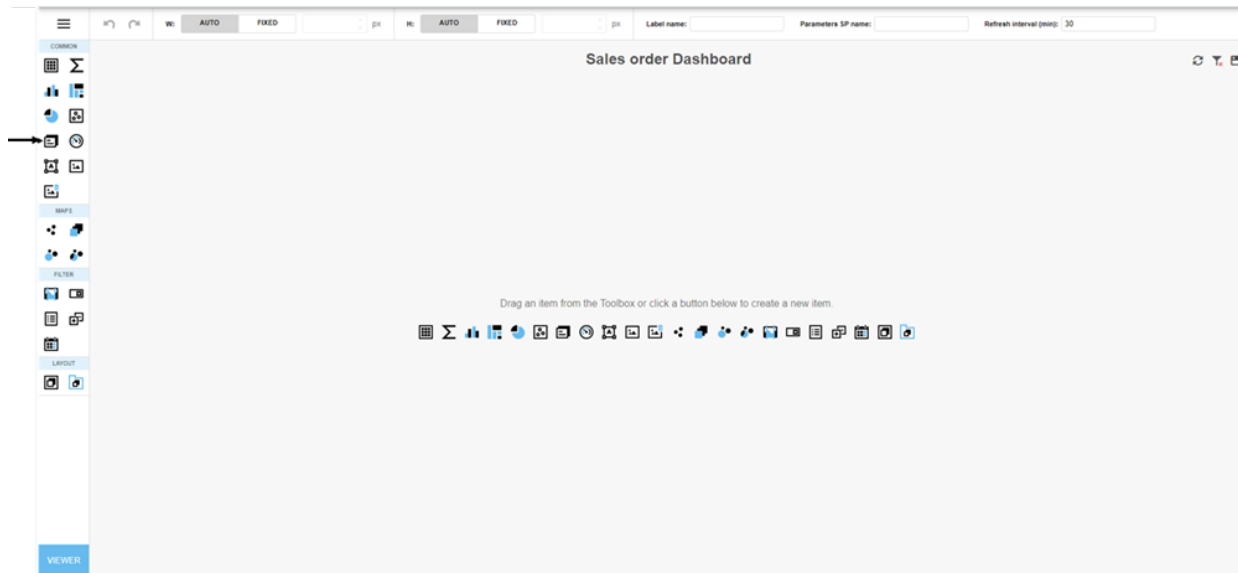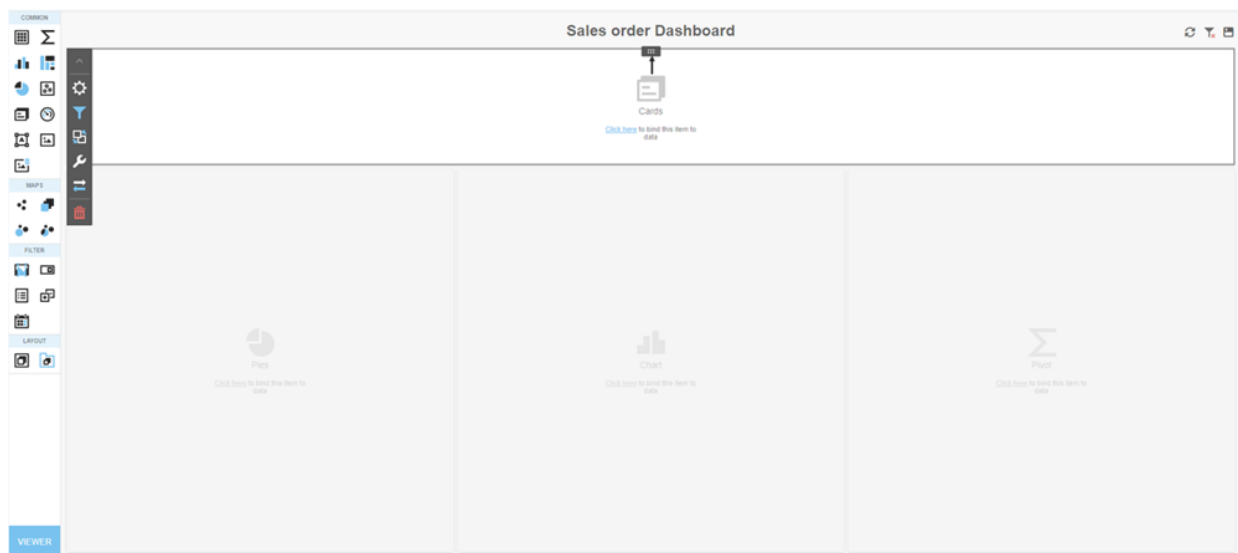
You will then be able to select multiple features to add to the dashboard.

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.

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

Field :	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.
⠇⠇	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.

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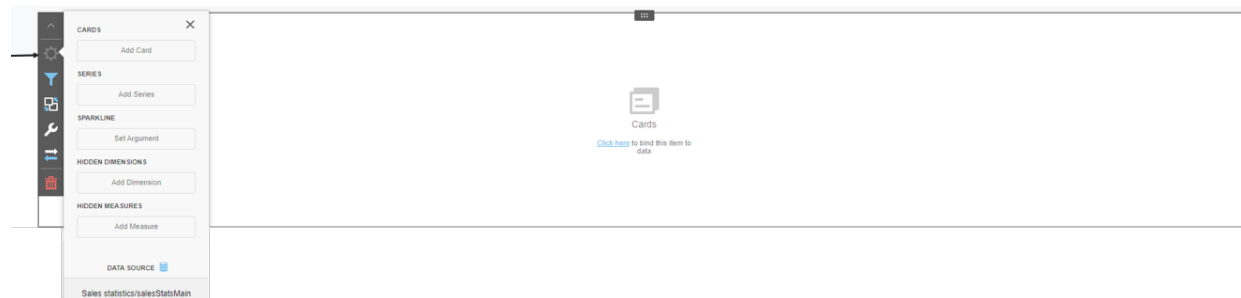
NOTE: The dropdown menu for configurations contains sections, each with its own options.

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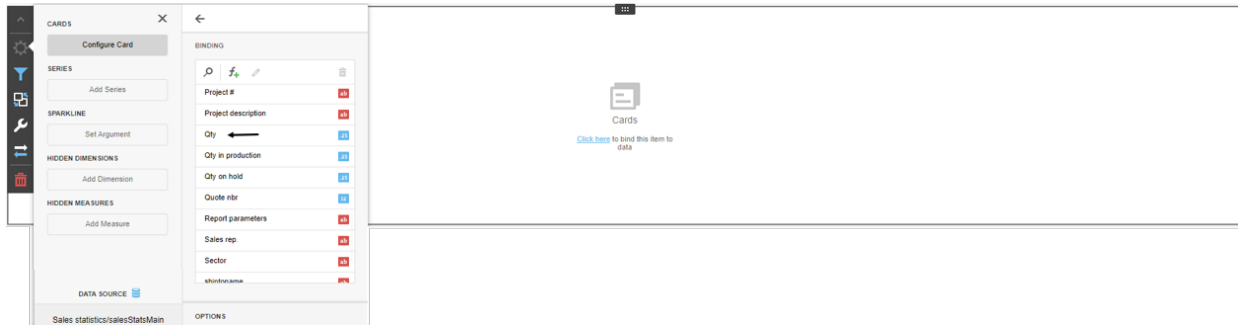
When a card is added, it will be displayed in the background, and you will be able to modify it through the available options.

NOTE: The card displayed in the background reflects real-time changes made.
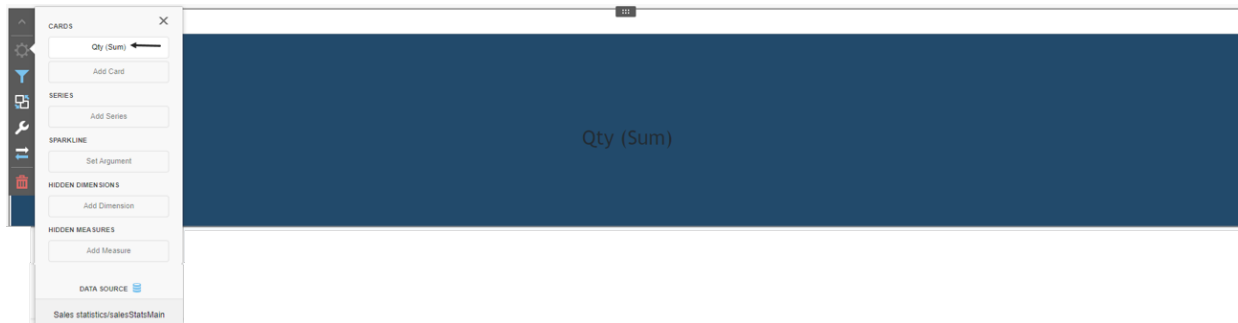
When adding the card, it automatically creates an initial target.

To modify the card format, click again on the card, then on the generated target.
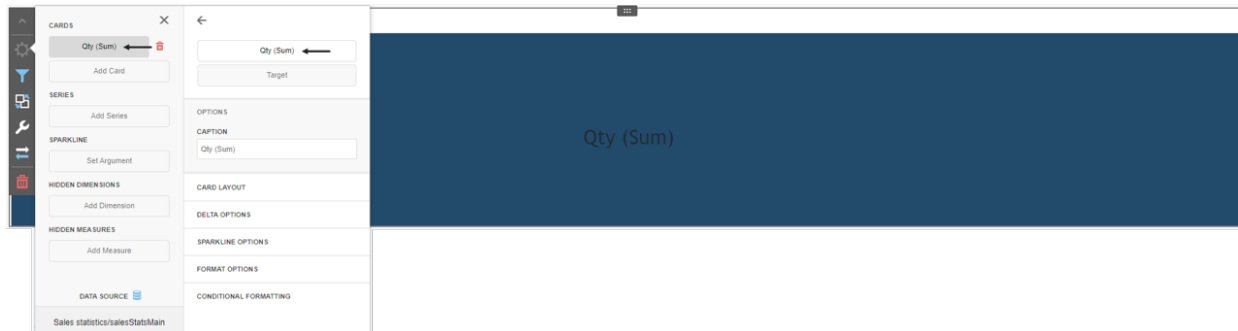
You will be able to modify the data type in the "Summary Type" field.

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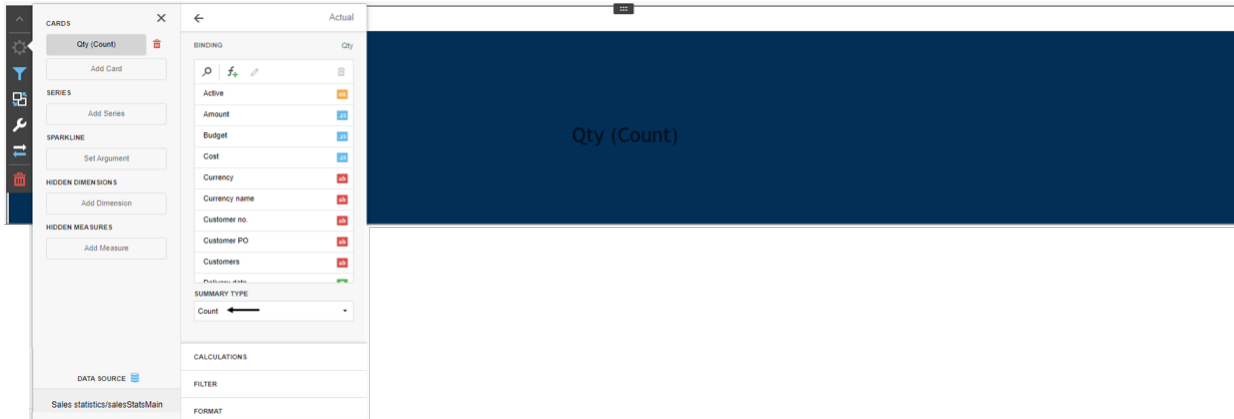
o **The option "Calculations"** allows you to modify the calculation type of the card.
This option is less commonly used in the card functionality.

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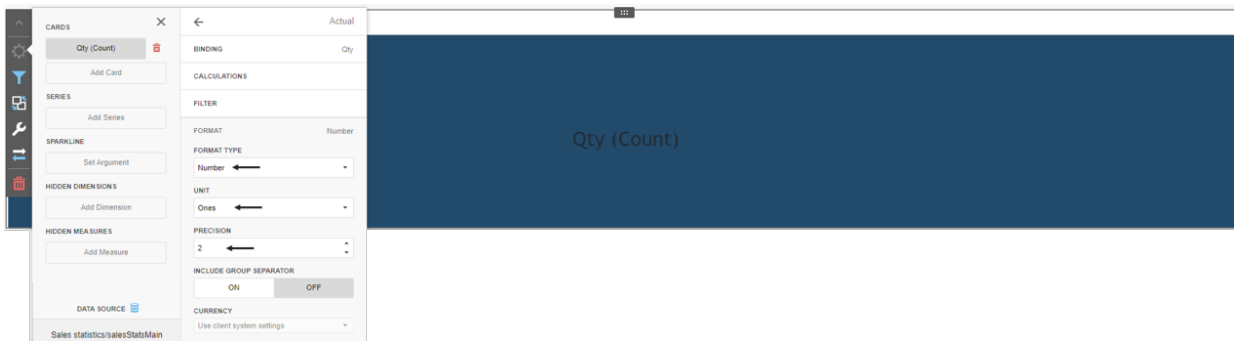
Click on the arrow to return to the "Card" section.

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.
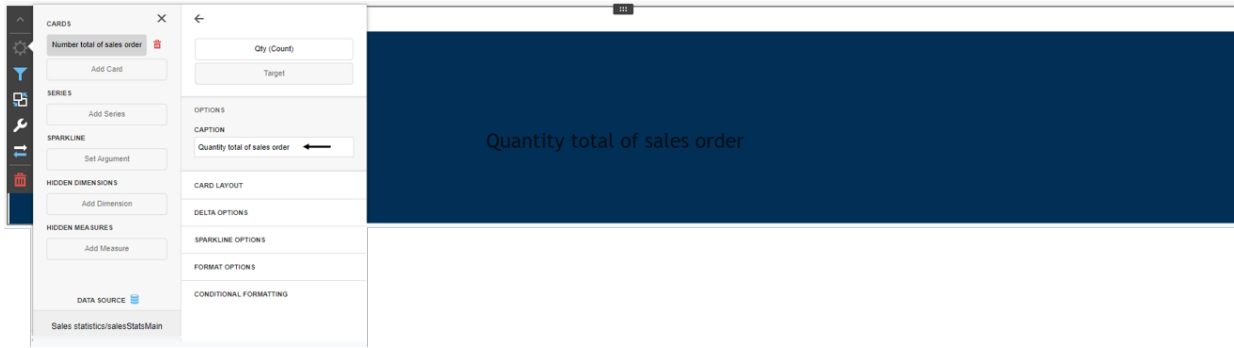
o **The option "Card layout"** allows you to visually modify the frame of the card.
Select the style to apply to the card.
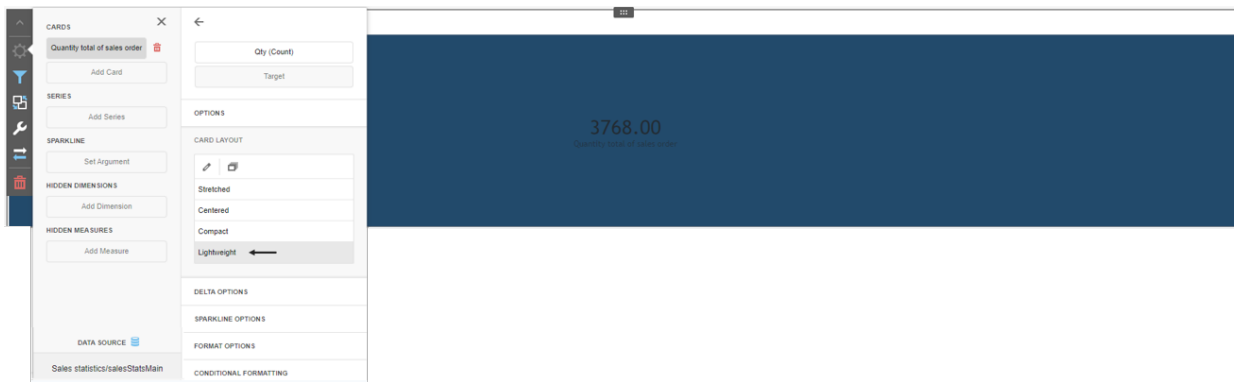
NOTE: It is possible to click on each of the styles to modify them. This functionality is not explained in this document. Additionally, in the provided dashboards of Prextra, the applied frame is "Lightweight".

o **The option "Delta options"** allows you to add result indicators.
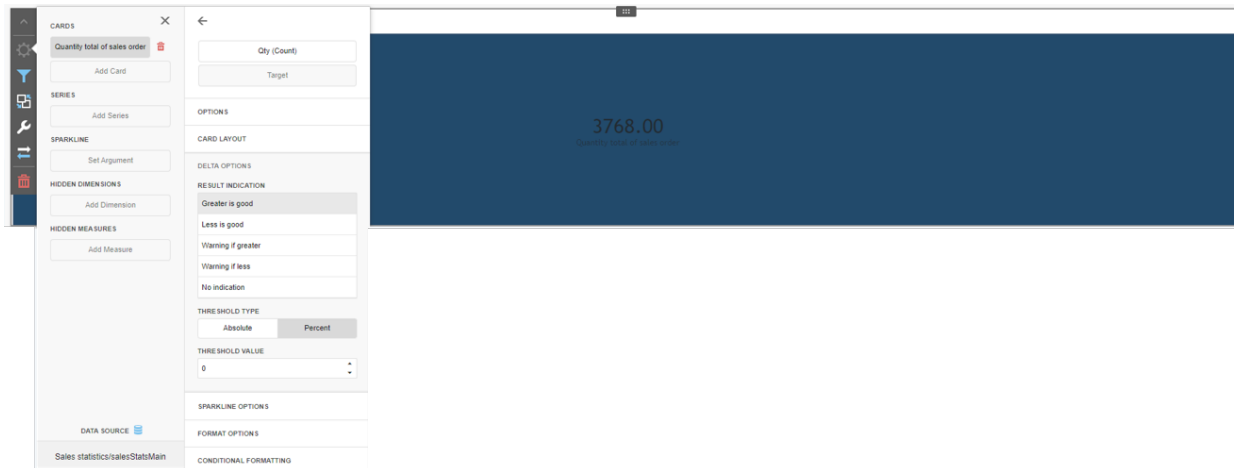
o **The option "Sparkline options"**allow you to modify the display type, highlight minimum and maximum points, and highlight start and end points for the peak.
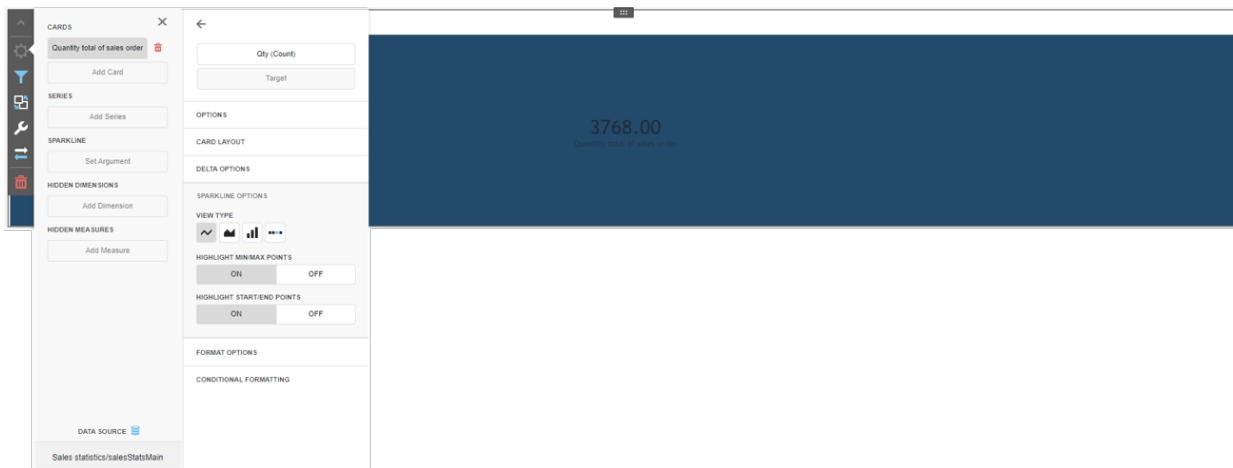
o **The option "Format options"** allows you to apply a format to the value displayed in the card.
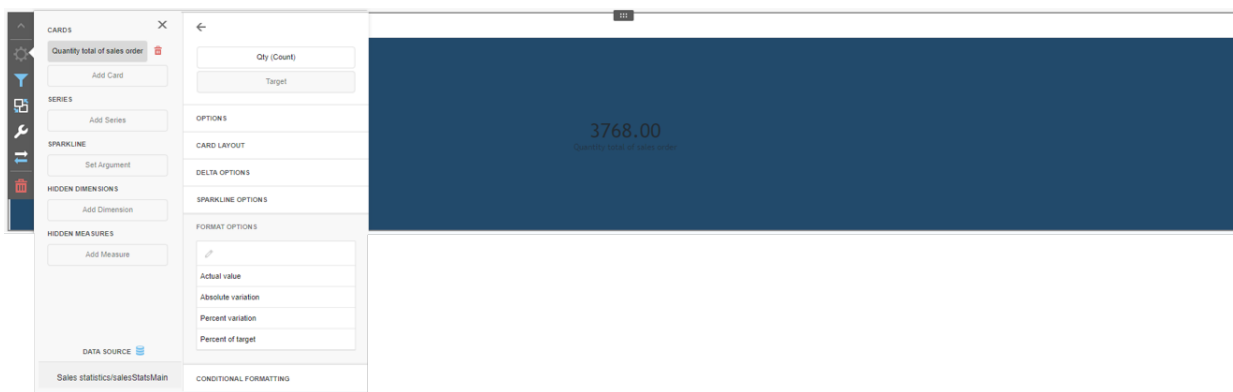
o **The option "Conditional Formatting"** allows you to create specifications in the card.

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.

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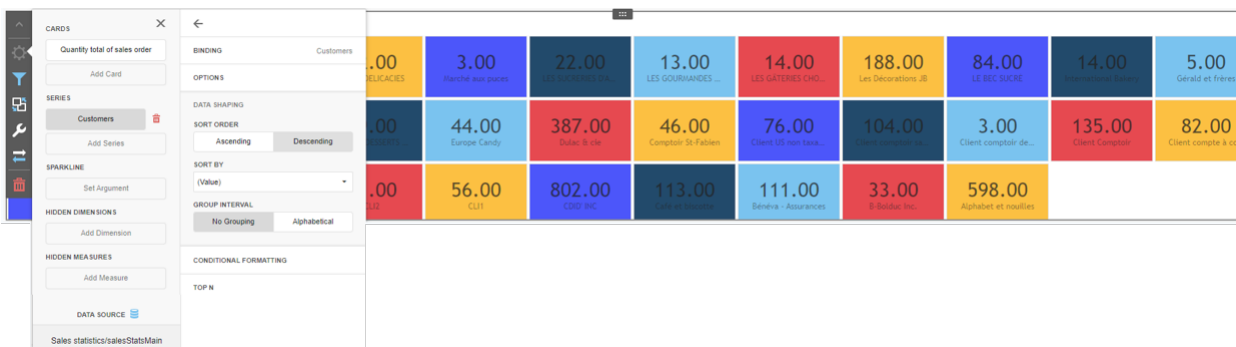
NOTE: In this document, the series has been removed for the following points.

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.
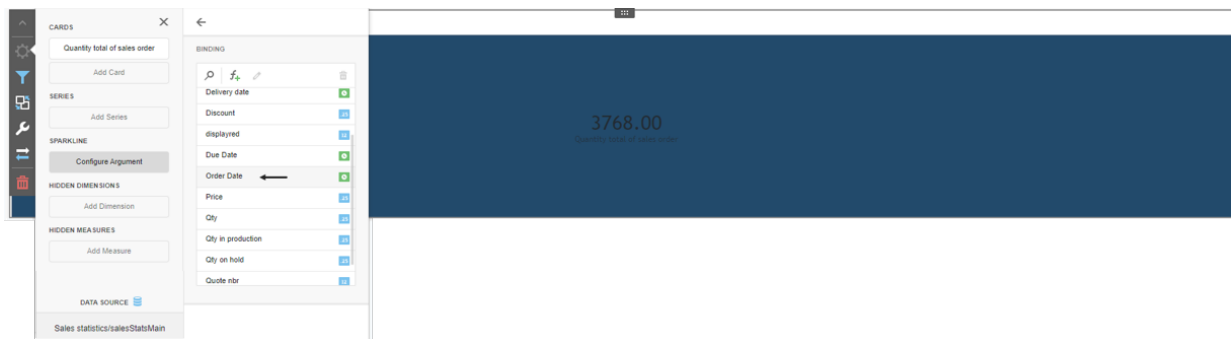
"Hidden measures" section

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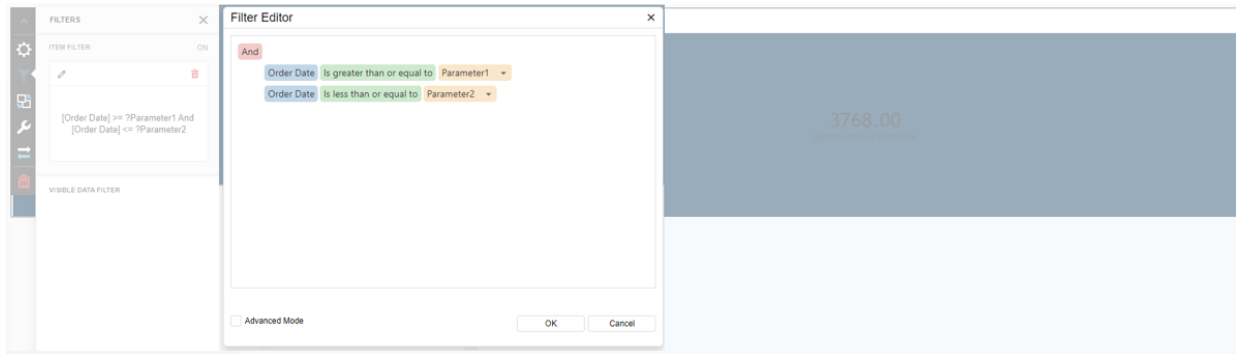
NOTE: To select a group or a condition, you must click on the functions to apply or modify them. Additionally, click on the arrow of the orange value to select whether your filter should be applied to a value, a property, or a parameter, and build your filter.

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.

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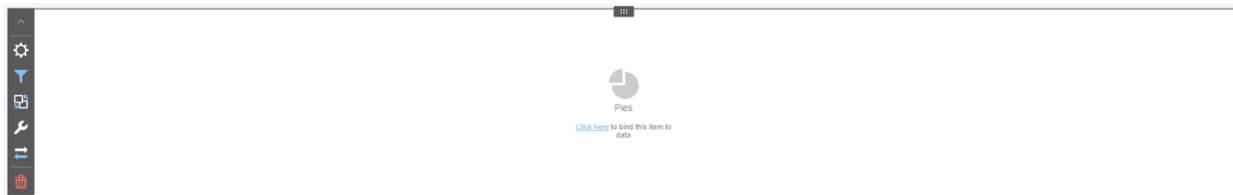
NOTE: The dropdown menu for configurations contains sections, each with its own different options.

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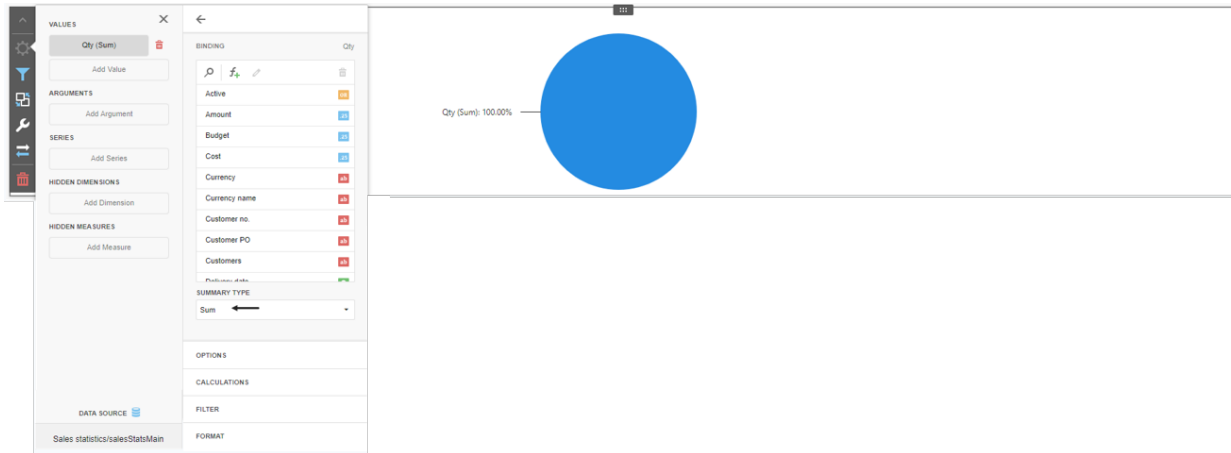
o **The option "Options"** allows you to rename the value.

In this example, the value has been renamed to "Sum of orders by salesperson".
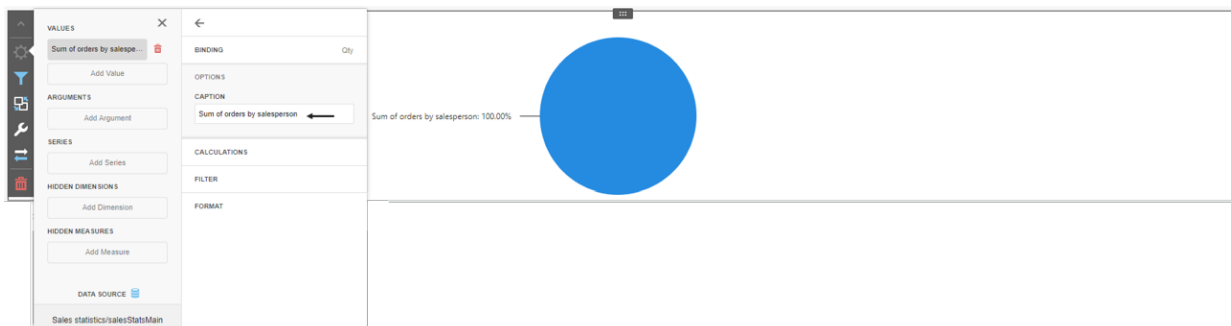
o **The option "Calculations"** allows you to modify the calculation type of the pie chart.

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.
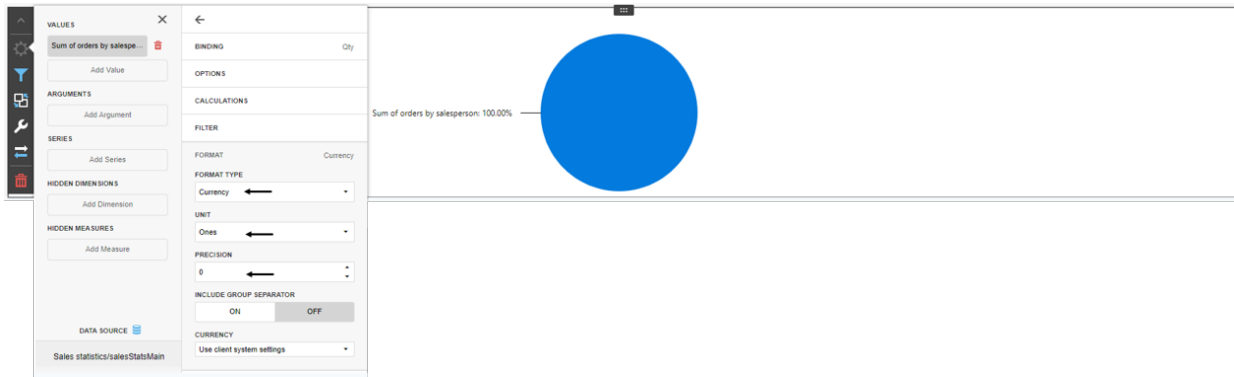
"Arguments" section

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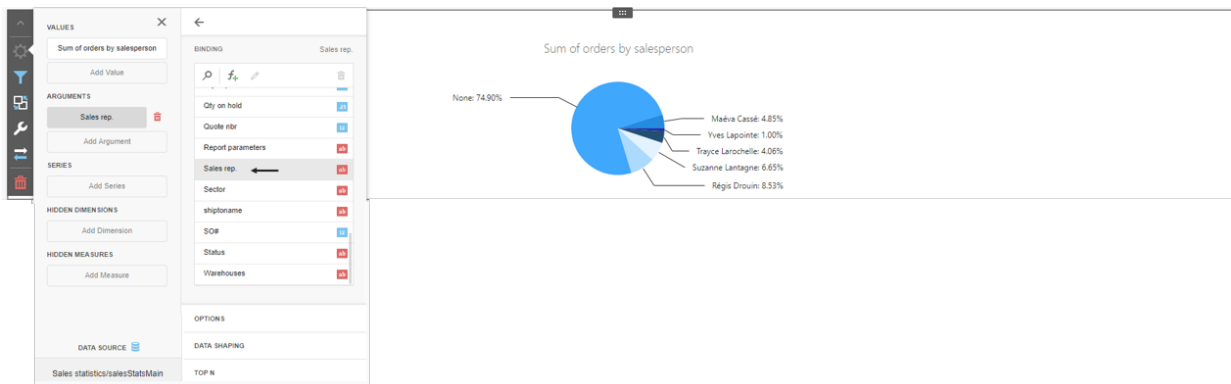
o **The option "Options"** allows you to rename the argument.

o **The option "Data Shaping"** allows you to display data according to different parameters.
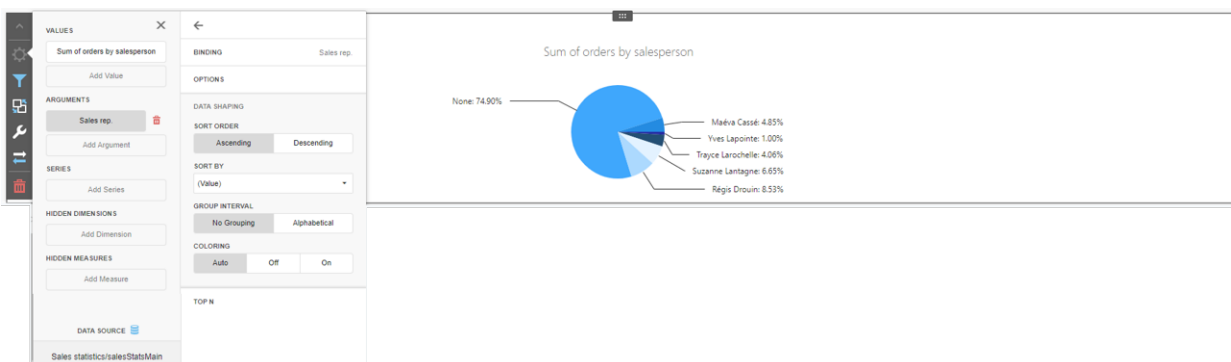
o **The option "Top N"** allows you to restrict the data to display in the pie chart.

In this example, the type was changed to "Bottom" to display equal sectors in the pie chart.
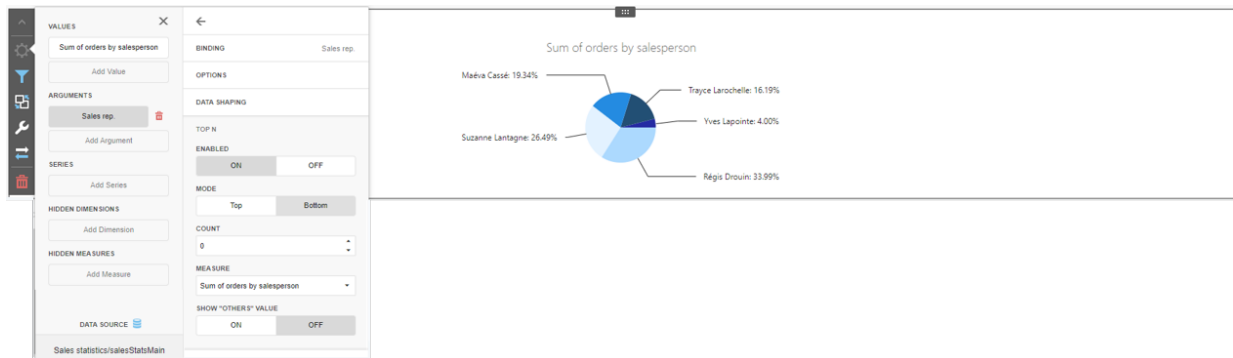
"Series" section

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.

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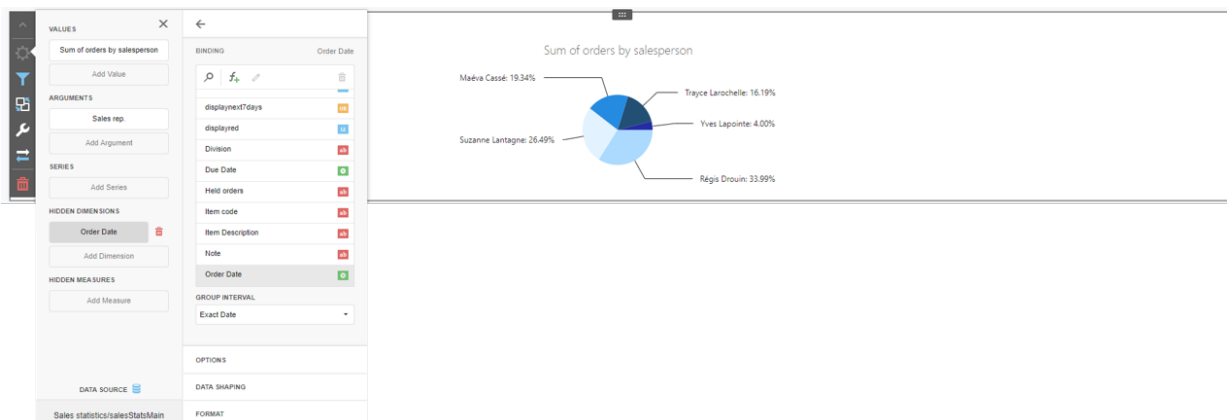
Additionally, in this example, a date filter has also been added to filter the "Number of orders" value according to the parameters entered in the "From Date" and "To Date" parameters of the dashboard.

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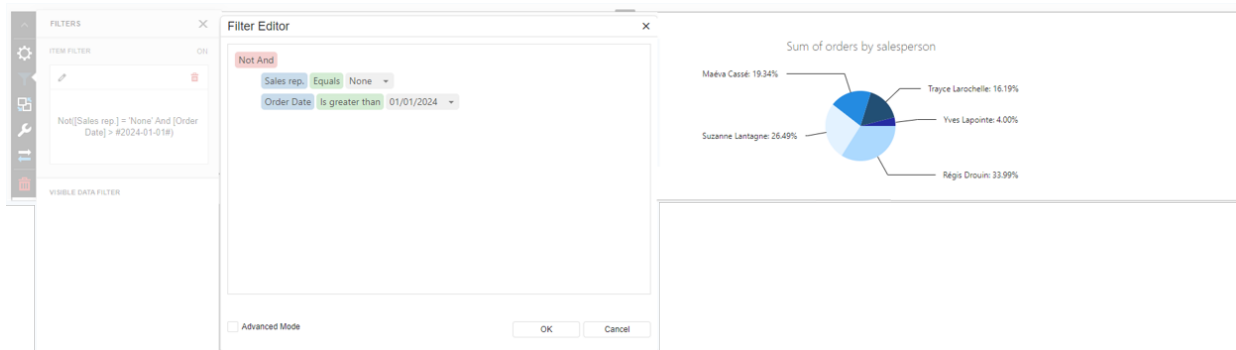
Additionally, in this example, a date filter has also been added to filter the "Number of orders" value according to the parameters entered in the "From Date" and "To Date" parameters of the dashboard.

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.
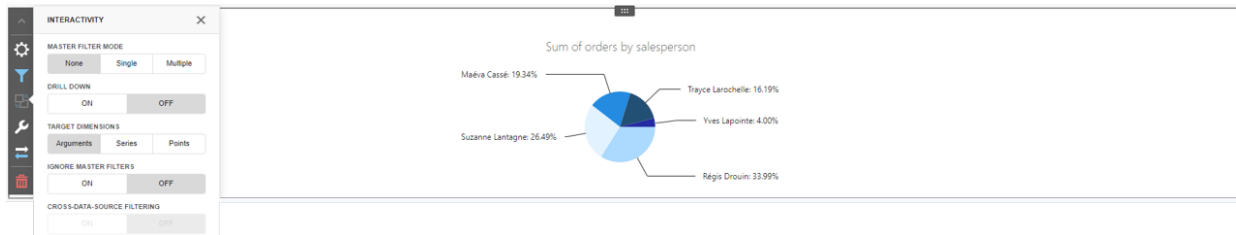
4.2.4 Options of the pie chart

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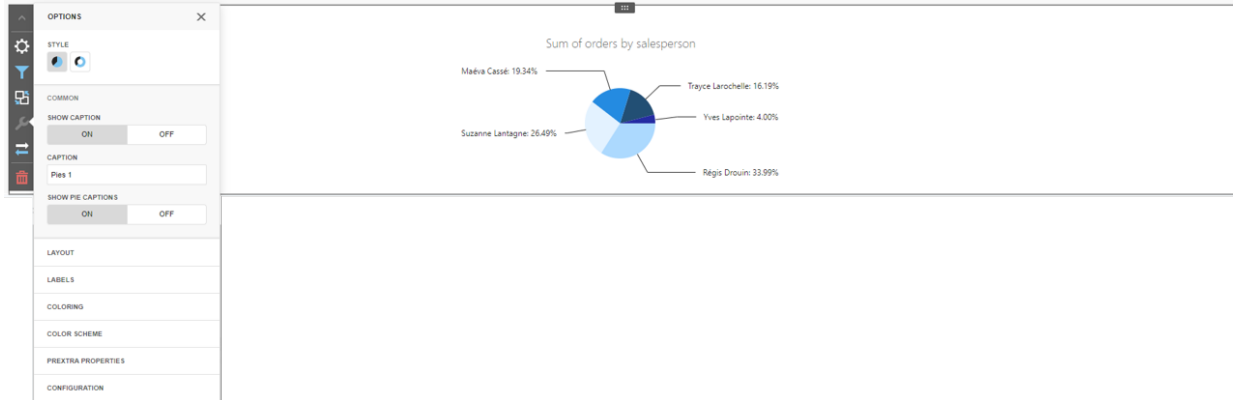
o **The option "Common"** allows you to show or hide the legend of the pie chart, as well as modify the label of the pie chart.

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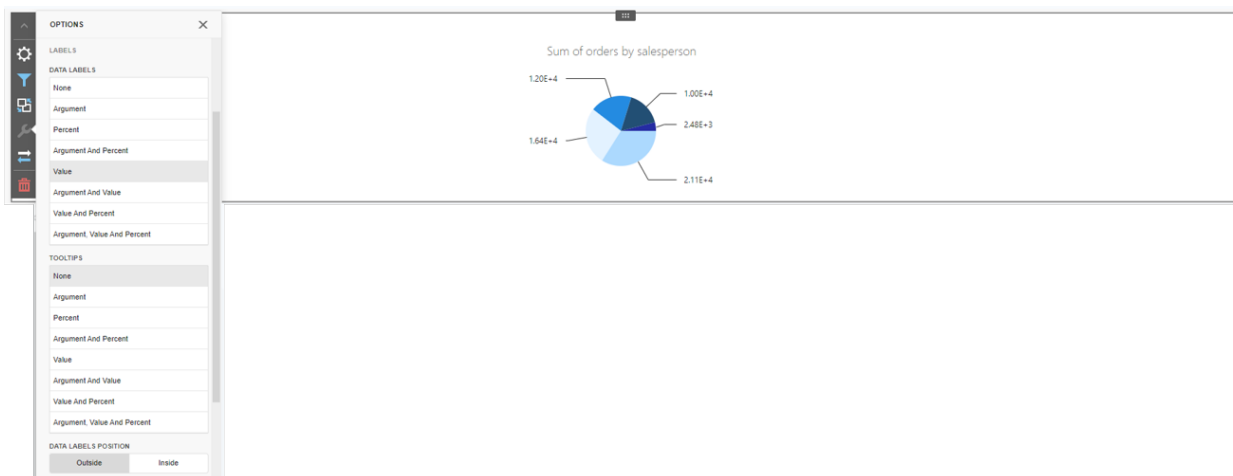
o **The option "Coloring"** allows you to modify the coloring of the pie chart, if needed.

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.
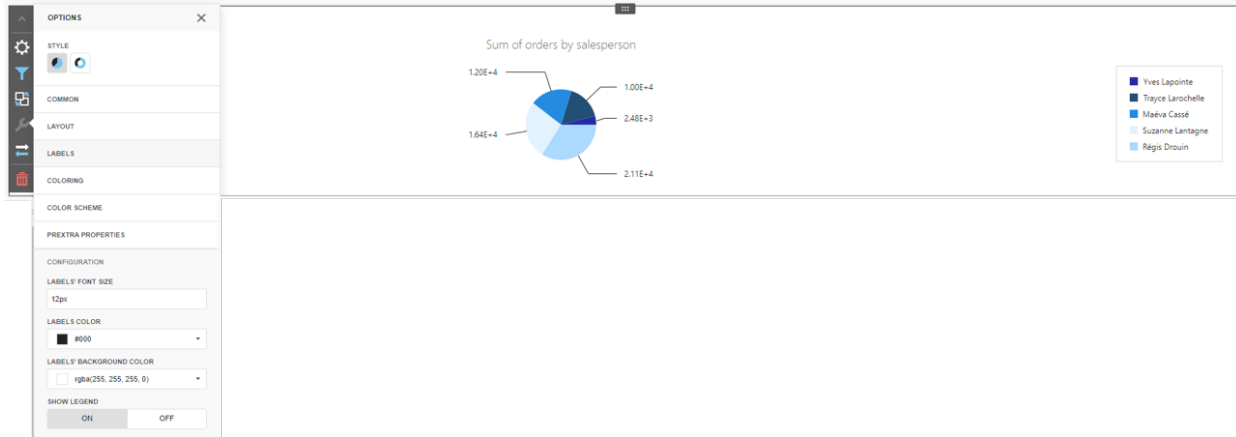
4.2.5 Convert the pie chart

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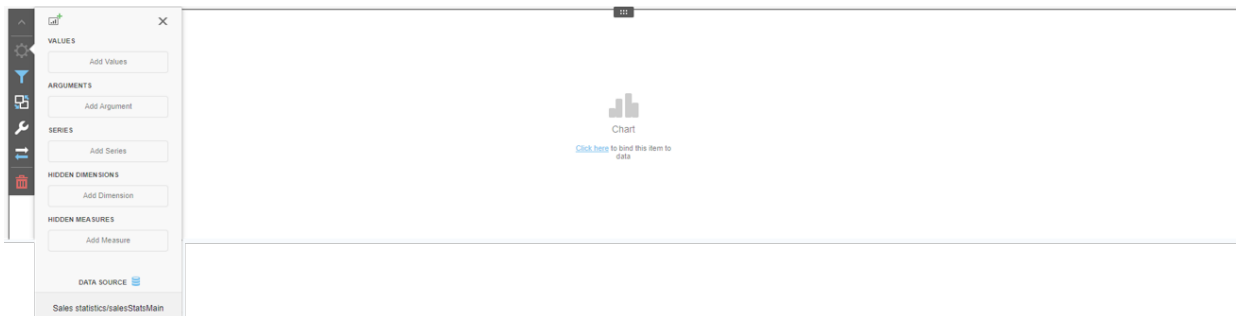
NOTE: The dropdown menu for configurations contains sections, each with its own different options.

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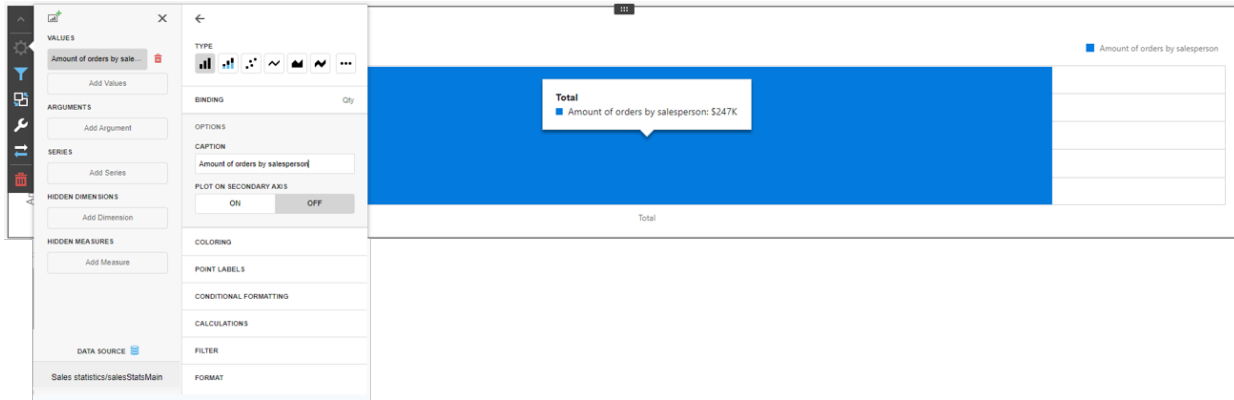
o **The option "Coloring"** allows you to modify the measures to color.

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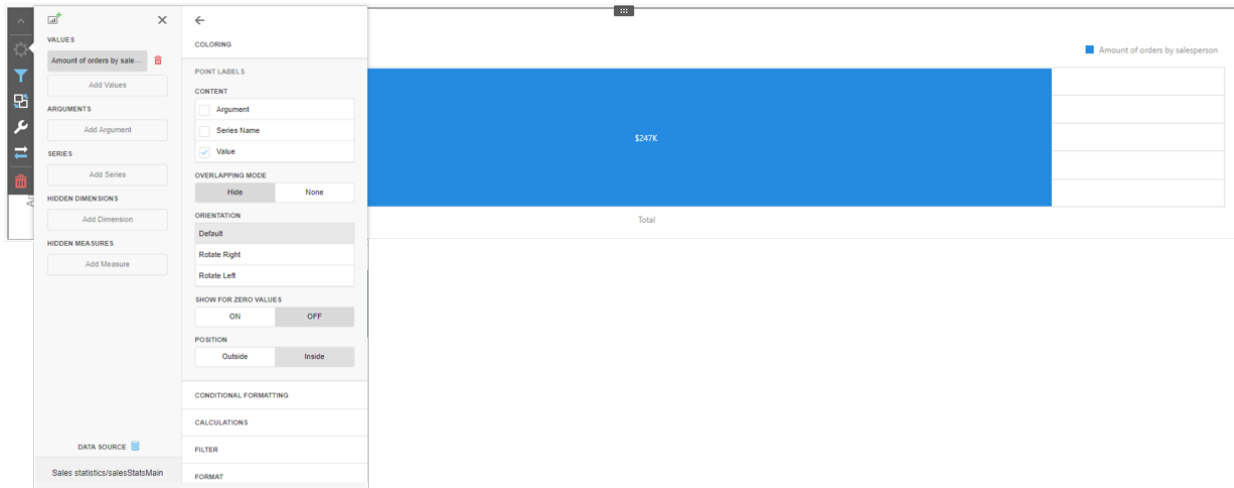
o **The option "Conditional Formatting"** allows you to create specifications for the bar chart.
Click on the add icon to add conditional formatting.

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.
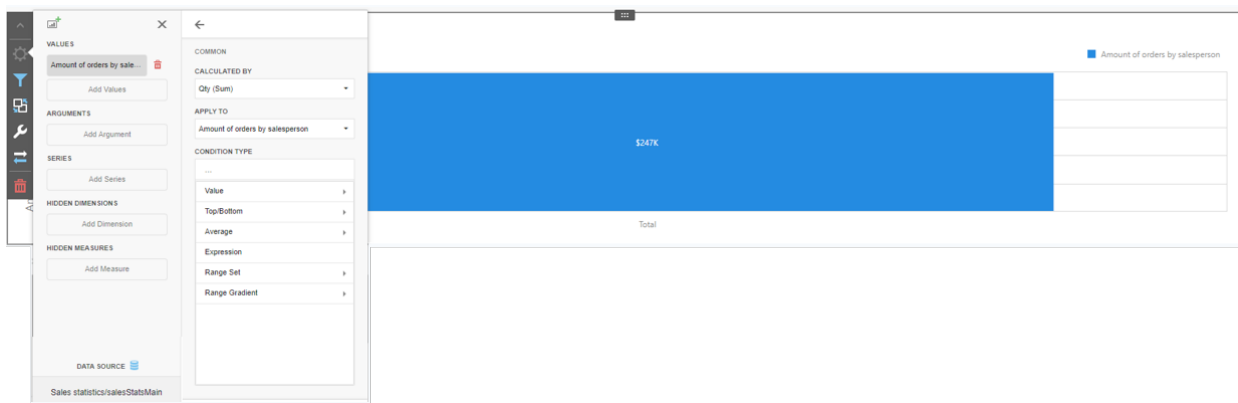
The "Common" option allows you to select the desired parameter and add a condition to it.

In this example, the condition is added to the "Value", so select "Value" in the "Condition type" section.
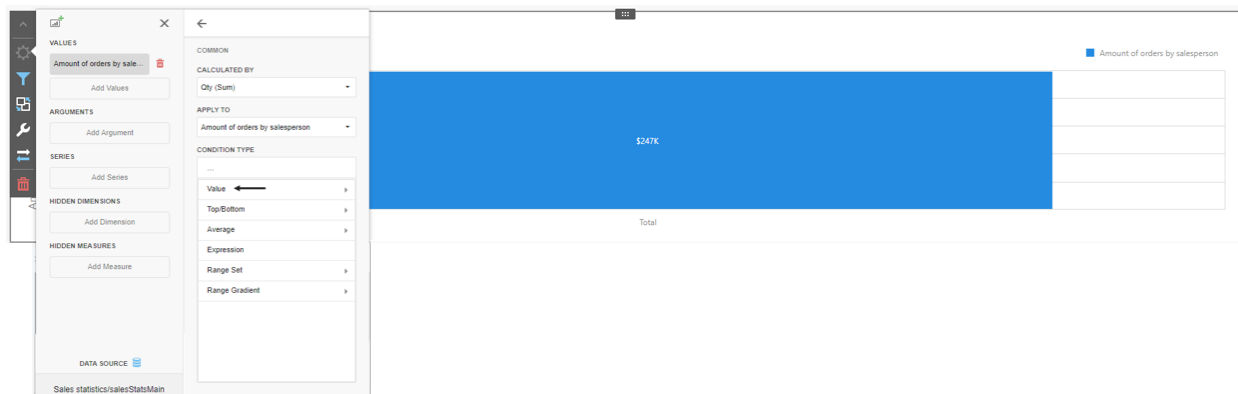
By selecting a condition, you will be able to determine a condition type on it.
In this example, the condition type is "Greater than".
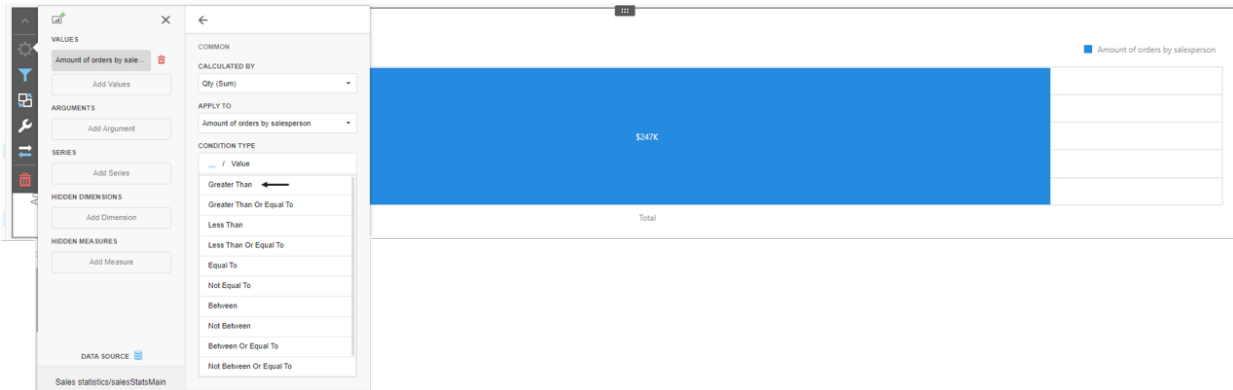
By selecting the condition type, the "Condition" option allows you to determine the condition parameters.
In this example, the band will be displayed in green if the value is greater than $10,000.

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.
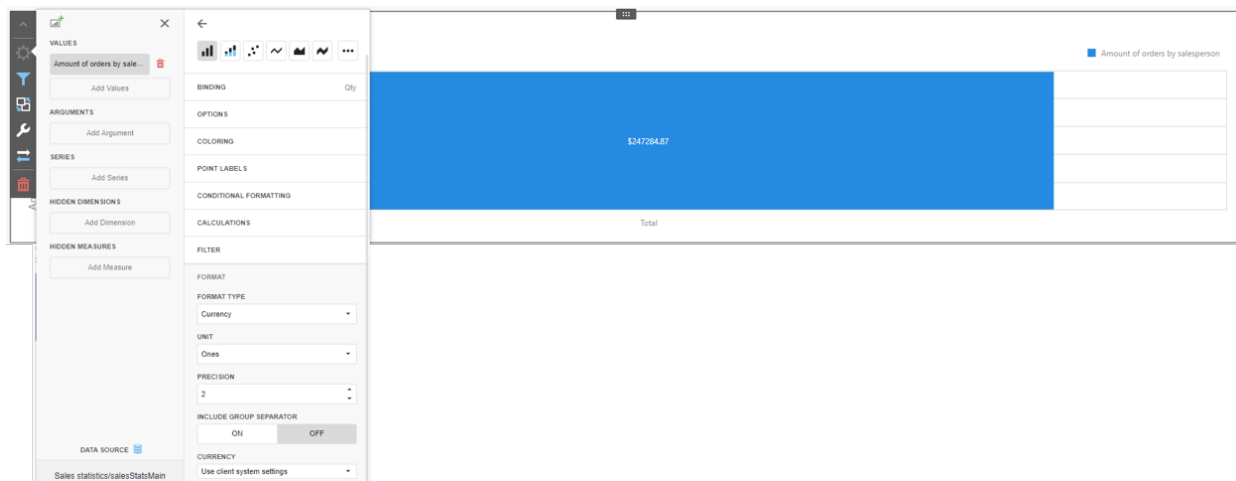
"Arguments" section

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.

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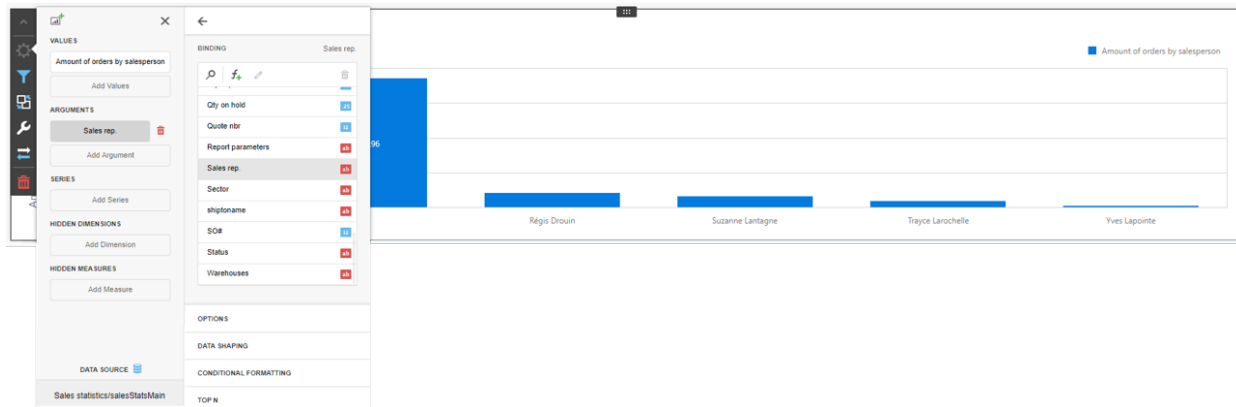NOTE: Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

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.
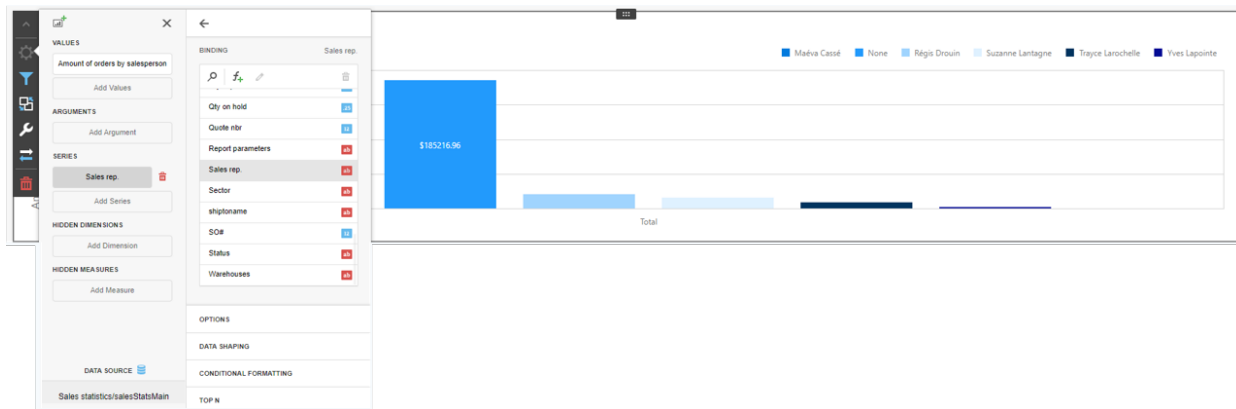
"Series" section

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.

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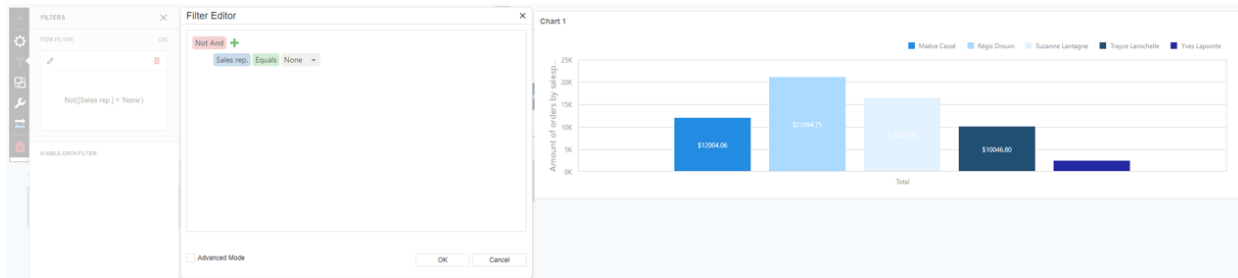
Furthermore, in this example, a date filter has also been added to filter the "Number of orders" value according to the parameters that will be entered in the "From date" and "To date" parameters of the dashboard.

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.
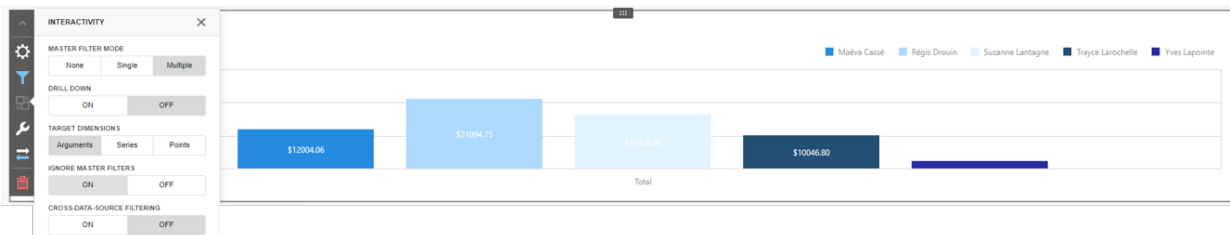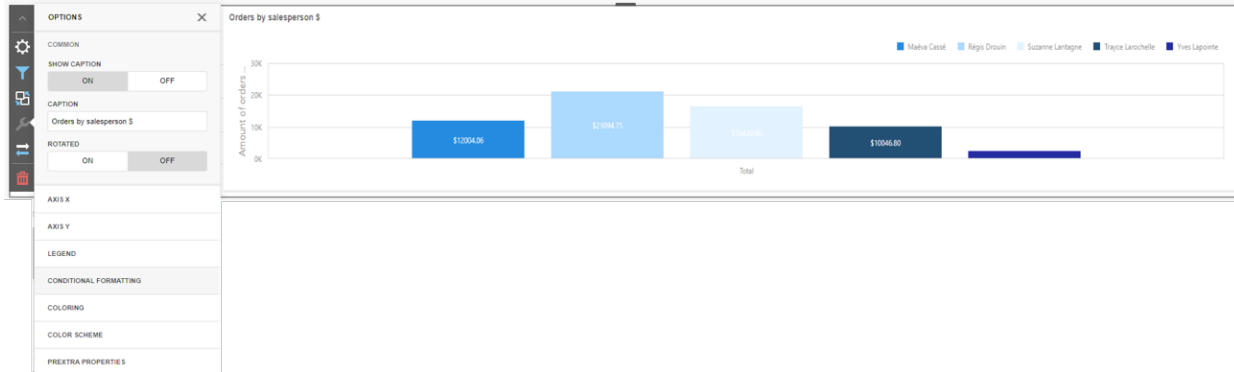

4.3.4 Options of the bar chart

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 $".

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.

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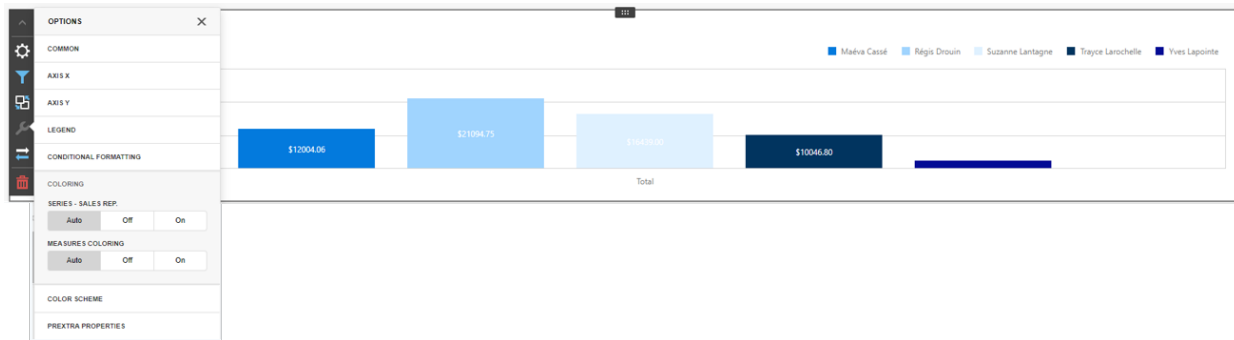
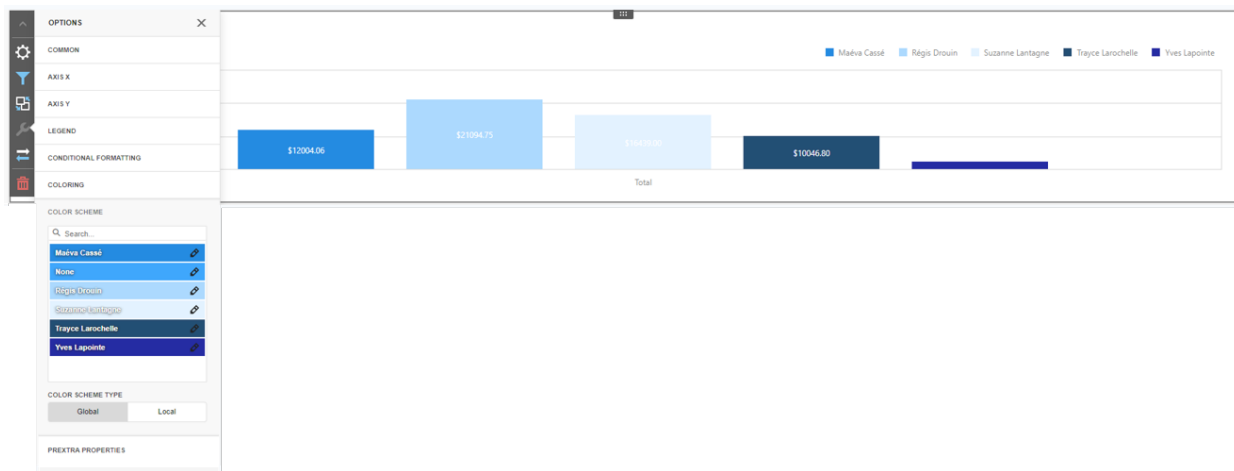o **The option "Color scheme"** allows you to modify the color scheme of each of the bands.

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.
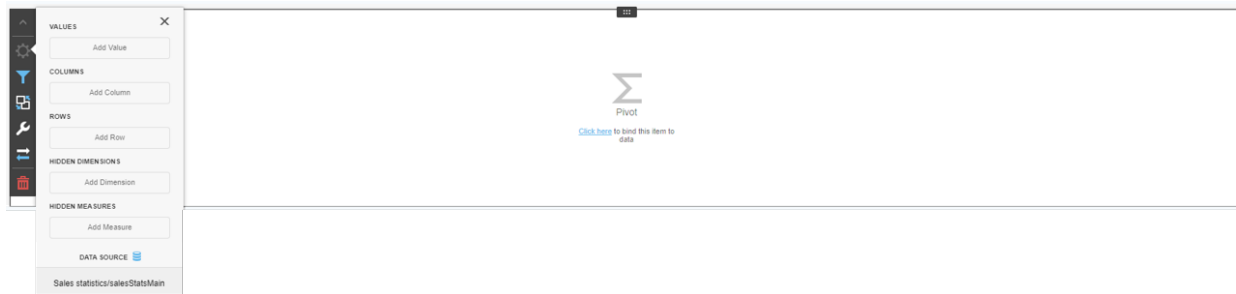
4.3.6 Remove the bar chart

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.

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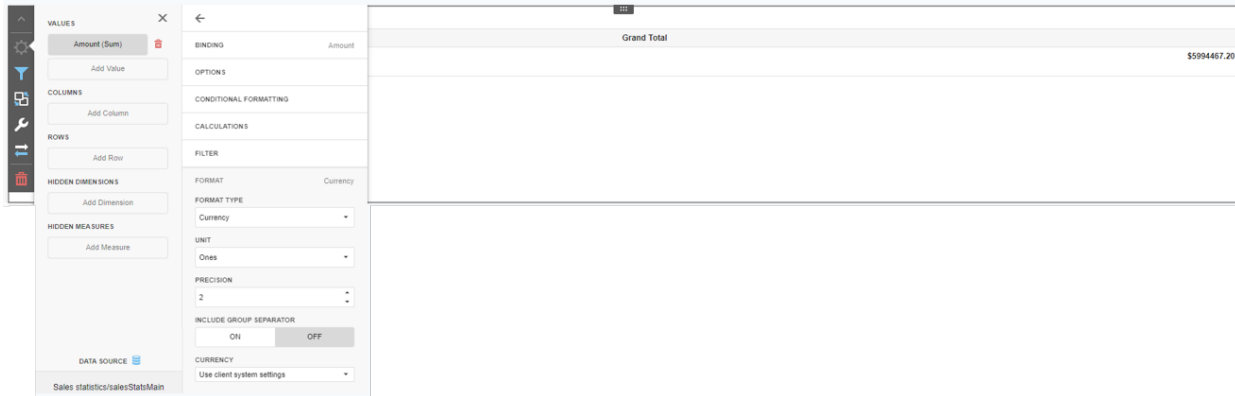
o **The option "Conditional Formatting"** allows you to create specifications in the pivot.
NOTE: Please refer to the "Conditional Formatting" option in the "Values" section of point 4.3.1 of this document for an example of conditional formatting.

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.

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.
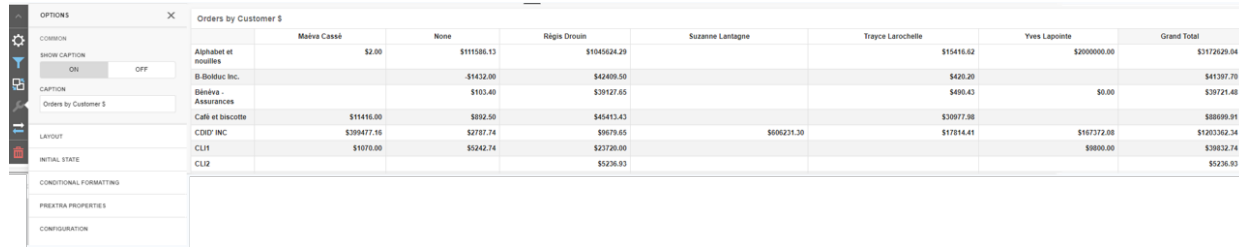
4.4.4 Options of the pivot

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 $".

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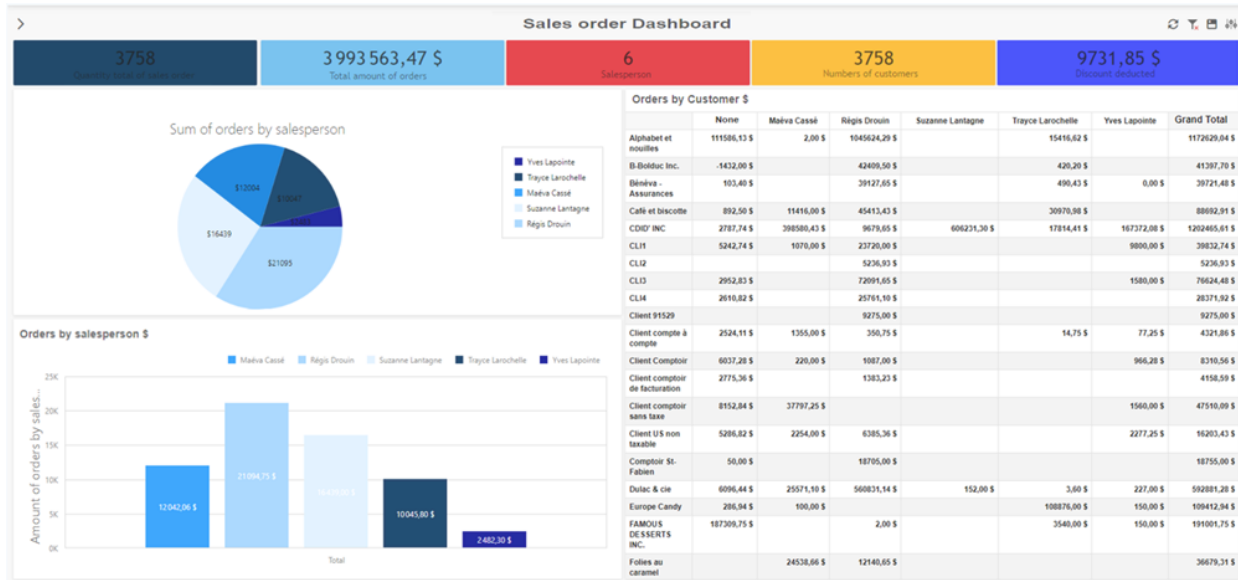
For any questions regarding this new feature, please refer to your project manager or to our customer support.