

Chapter 14

Dashboards



Figure 14.1: Dashboard icon.

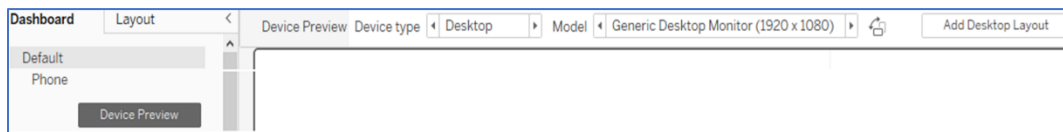


Figure 14.2: Default and Device Preview option.

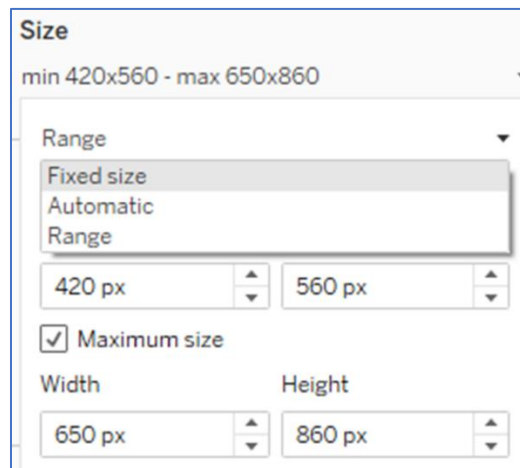


Figure 14.3: The Size option.



Figure 14.4: List of available sheets in the workbook.

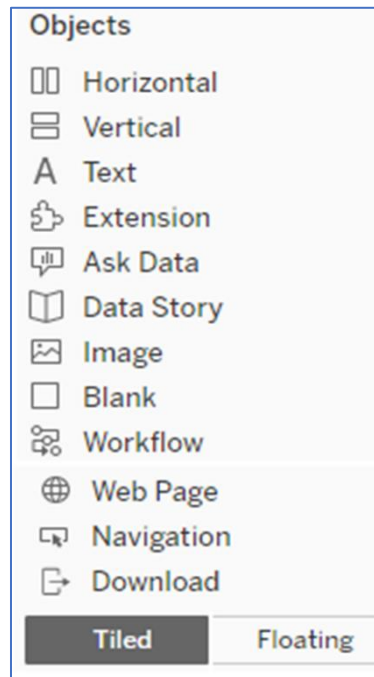


Figure 14.5: Objects in Dashboards.

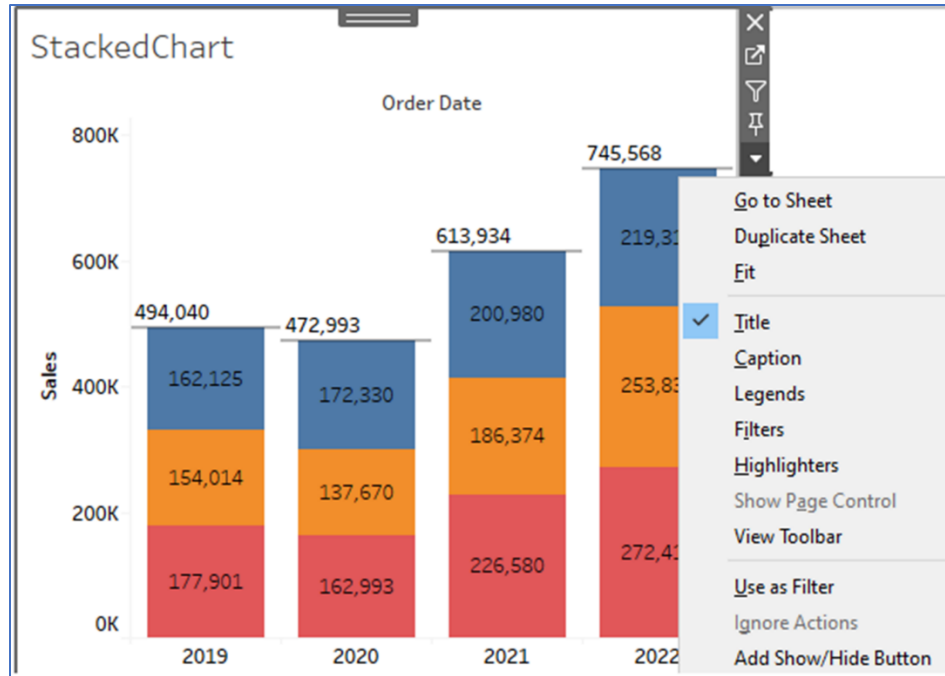


Figure 14.6: Menu options on the sheet.

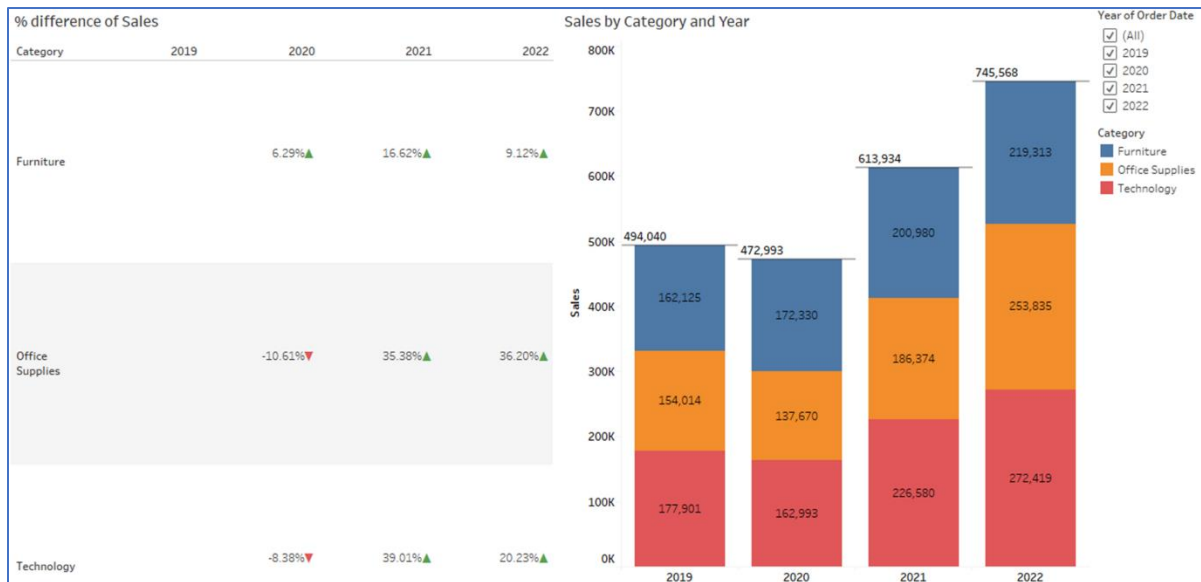


Figure 14.7: Dashboard with two sheets.

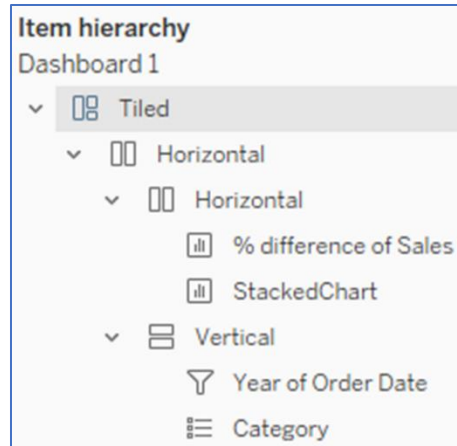


Figure 14.8: Item hierarchy in the Layout pane.

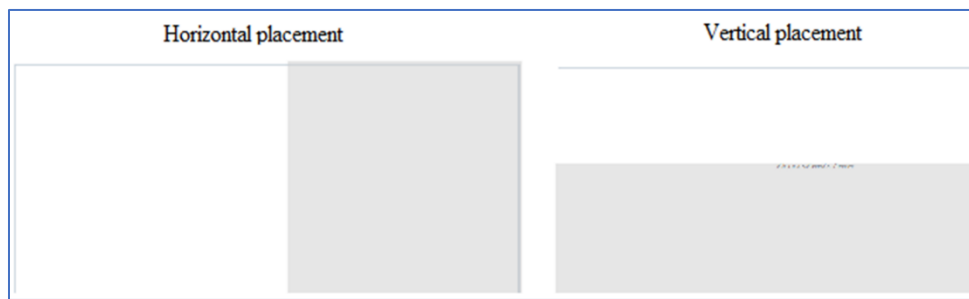


Figure 14.9: Horizontal and Vertical placement of Items on a container.

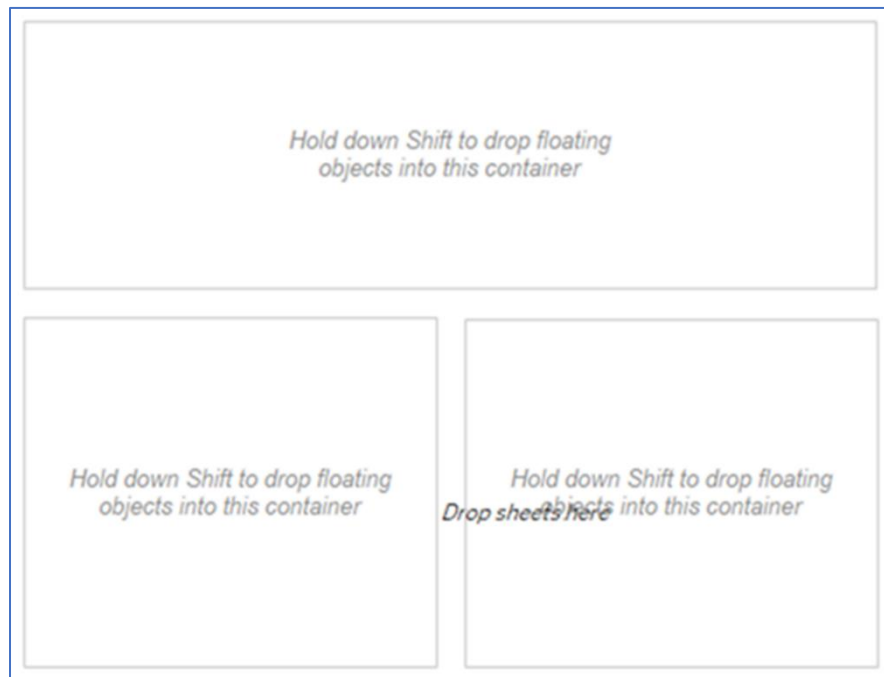


Figure 14.10: Floating containers.

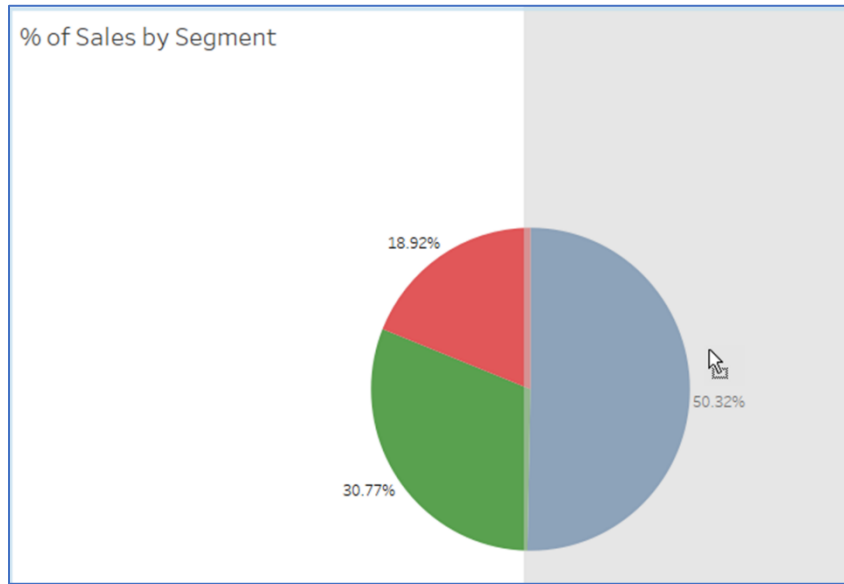


Figure 14.11: Placing Highlight Table view on the canvas.

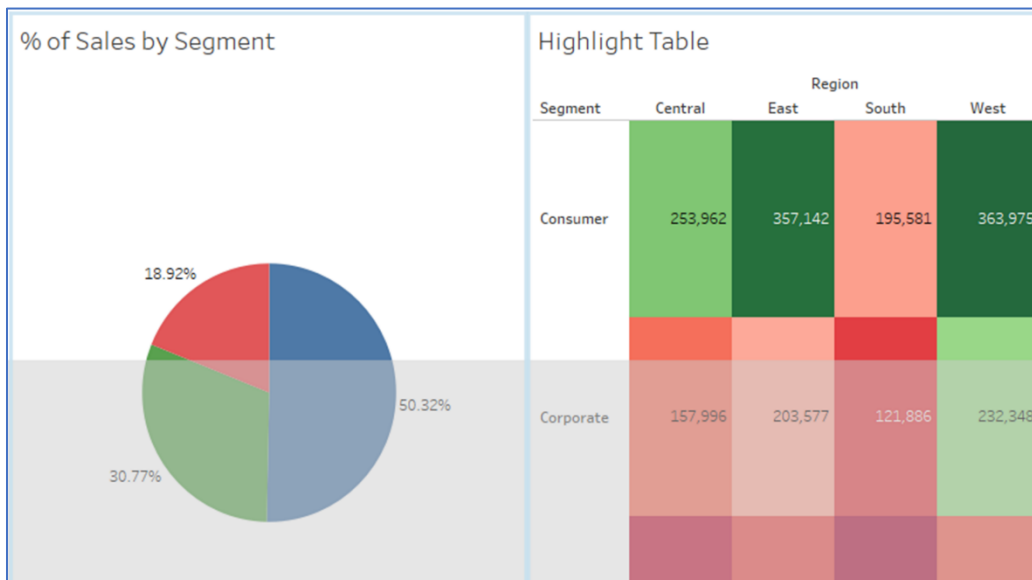


Figure 14.12 Placing Trend of Profit by Segment view on the canvas.

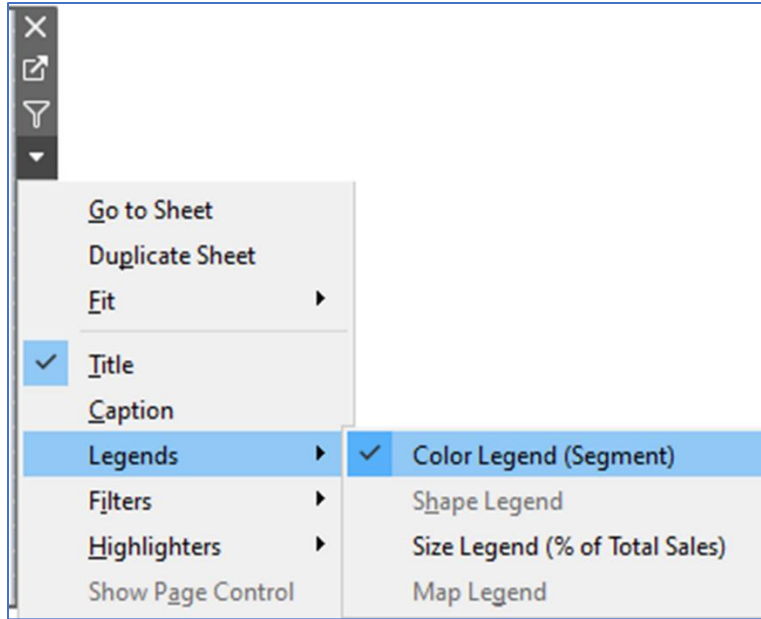


Figure 14.13: Selecting legends for the pie chart.

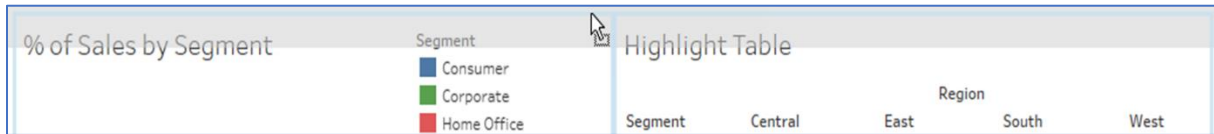


Figure 14.14: Placing horizontal container on top for filters.

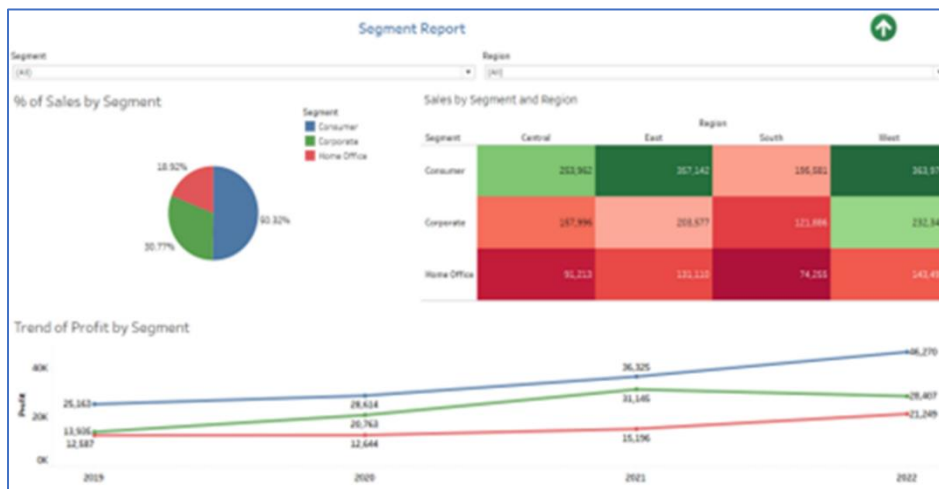


Figure 14.15: Segment Report dashboard.

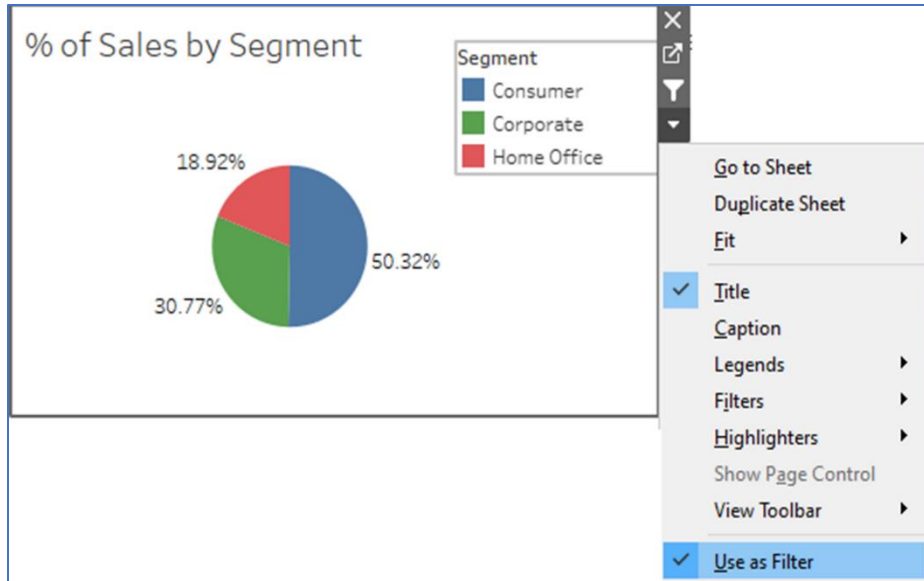


Figure 14.16: Use as Filter option on the visualization.

The "Edit Filter Action" dialog box contains the following configuration:

- Name:** Filter 1 (generated)
- Source Sheets:** Db_SegmentReport
 - % of Sales by Segment
 - Highlight Table
 - Trend of Profit by Segment
- Run action on:**
 - Hover
 - Select
 - Menu
 - Single-select only
- Target Sheets:** Db_SegmentReport
 - % of Sales by Segment
 - Highlight Table
 - Trend of Profit by Segment
- Clearing the selection will:**
 - Keep filtered values
 - Show all values
 - Exclude all values
- Filter:**
 - All fields
 - Selected fields

Source Field	Target Data Source	Target Field
<input type="checkbox"/> Click to add		

Buttons: Remove, Cancel, OK

Figure 14.17: Options available under Filter Action.

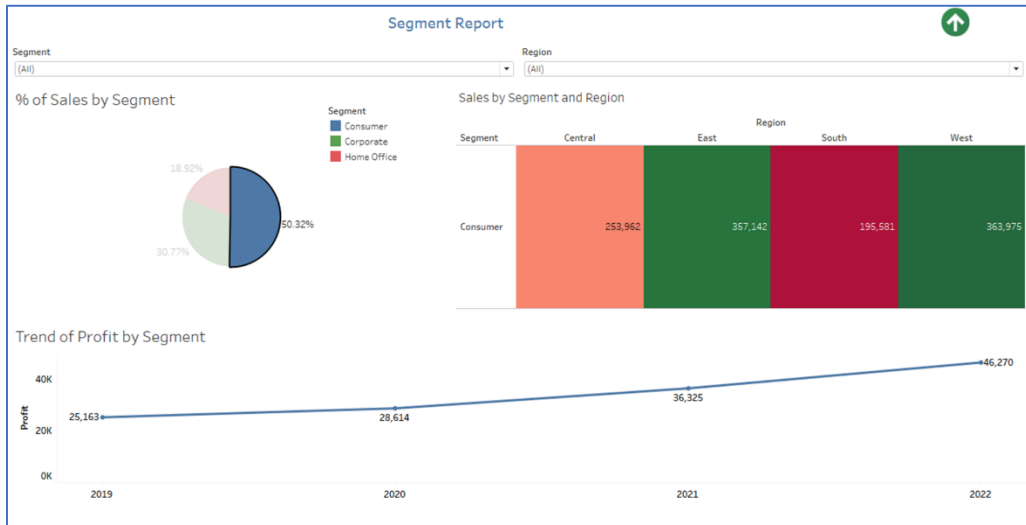


Figure 14.18: % of Sales Segment view acting as a filter.

The 'Add Filter Action' dialog box is configured as follows:

- Name:** Filter_MasterDetail
- Source Sheets:** Db_YearlySalesbyCategory
- Run action on:** Select
- Target Sheets:** Db_Details
- Clearing the selection will:** Show all values
- Filter:** Selected fields
- Filter Table:**

Source Field	Target Data Source	Target Field
Category	Orders (Sample - Superstore, v)	Category
# YEAR(Order Date)	Orders (Sample - Superstore, v)	# YEAR(Order Date)
Click to add		

Figure 14.19: Filter Action for Master-Detail report.

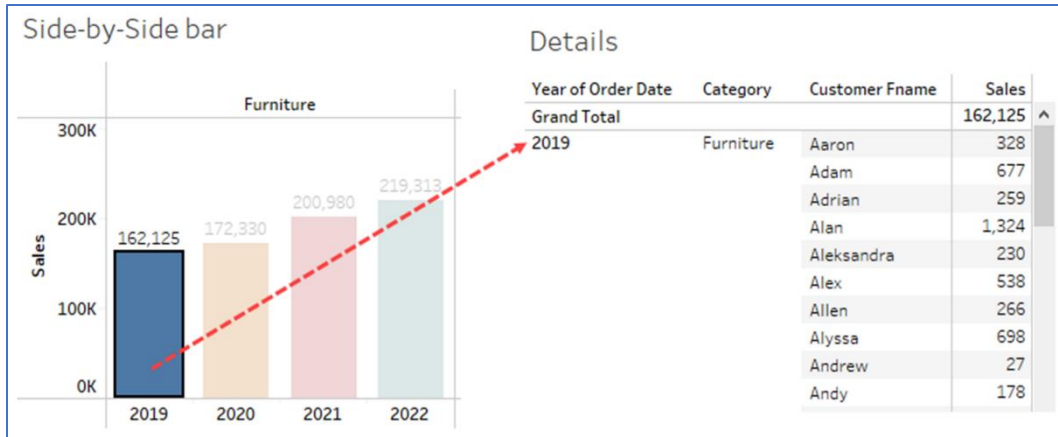


Figure 14.20: Master-Detail functionality implemented by using filter Action.

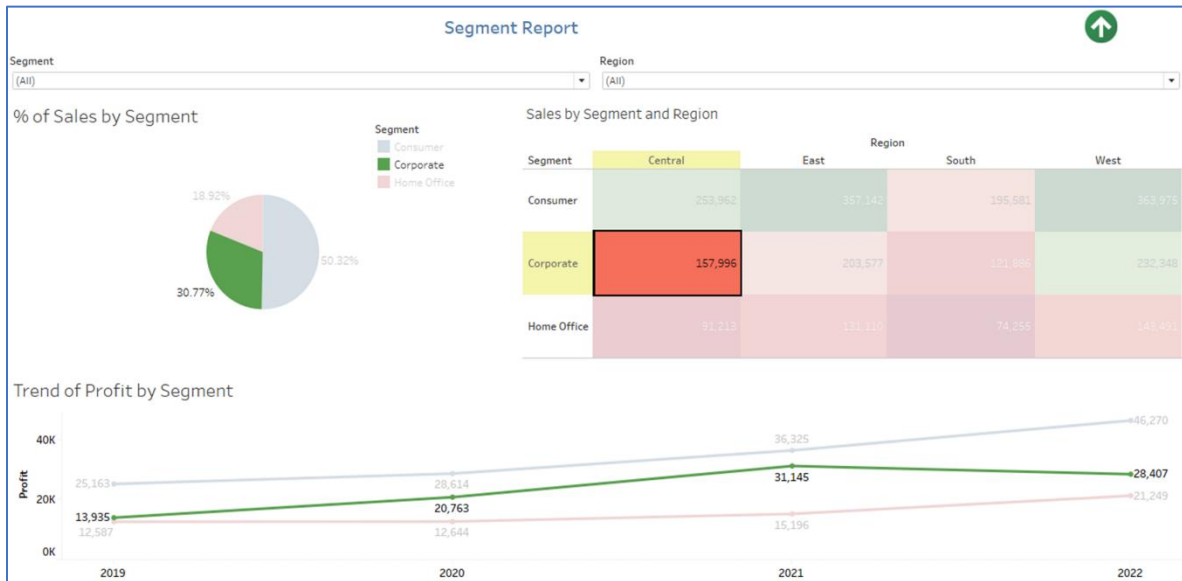


Figure 14.21: Highlight Action highlight the mark on all the sheets.

Add URL Action [X]

Name: Insert ▾

Source Sheets: Run action on

% difference of Sales
 StackedChart

Hover
 Select
 Menu

URL Target: New Tab if No Web Page Object Exists
 New Browser Tab

URL: Insert ▾
<https://en.wikipedia.org/wiki/Furniture>

Data Values [Learn more](#)
 Encode data values that URLs do not support
 Allow multiple values via URL parameters

Figure 14.22: URL Action Settings.

Create Parameter [X]

Name:

Properties

Data type: Display format:

Current value: Value when workbook opens:

Allowable values: All List Range

Figure 14.23: Create Parameter.

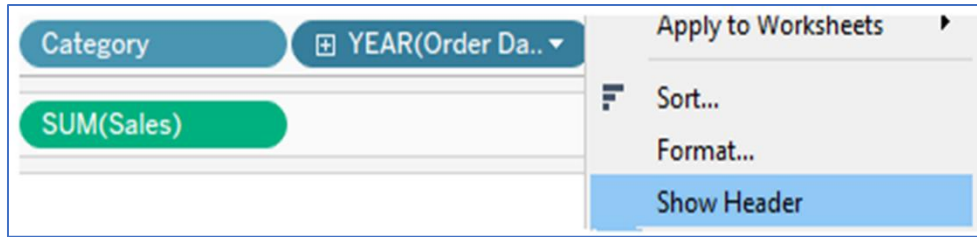


Figure 14.24: Hiding one Year header from the view.

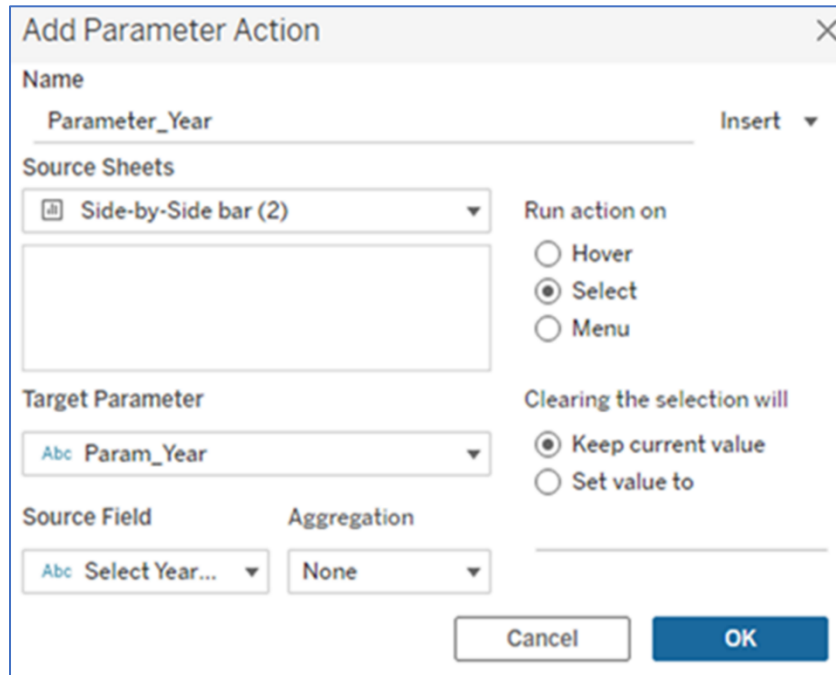


Figure 14.25: Parameter Action settings.

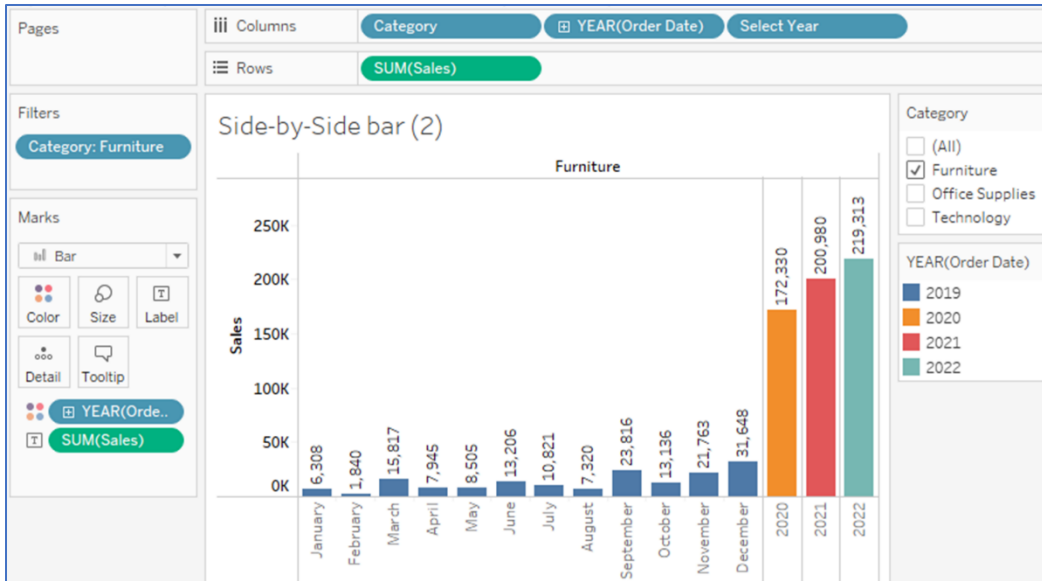


Figure 14.26: Year drill-down to months using Parameter Action.

Add Set Action

Name: Set1 Insert ▾

Source Sheets

- Db_State_SubCat
- Lollipop Chart (2)
- Sales By States

Run action on

- Hover
- Select
- Menu
- Single-select only

Target Set: State Set

Running the action will

- Assign values to set
- Add values to set
- Remove values from set

Clearing the selection will

- Keep set values
- Add all values to set
- Remove all values from set

Figure 14.27: Set Action settings.

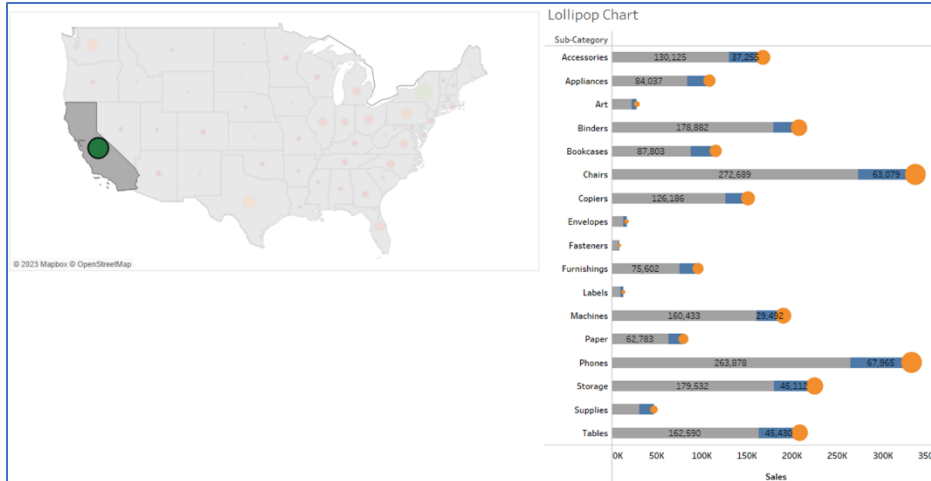


Figure 14.28: Chart displaying the result of Set Action.

Create Parameter ✕

Name
Show Charts_param

Properties

Data type: String Display format: Char1

Current value: Char1 Value when workbook opens: Current value

Allowable values

All
 List
 Range

Value	Display As
Chart1	Chart1
Chart2	Chart2
Chart3	Chart3
Click to add	

Fixed
 When workbook opens

Figure 14.29: Create parameter for show and hide.

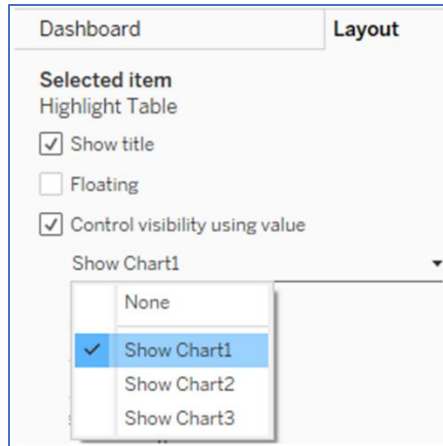


Figure 14.30: Option for Control visibility using value.

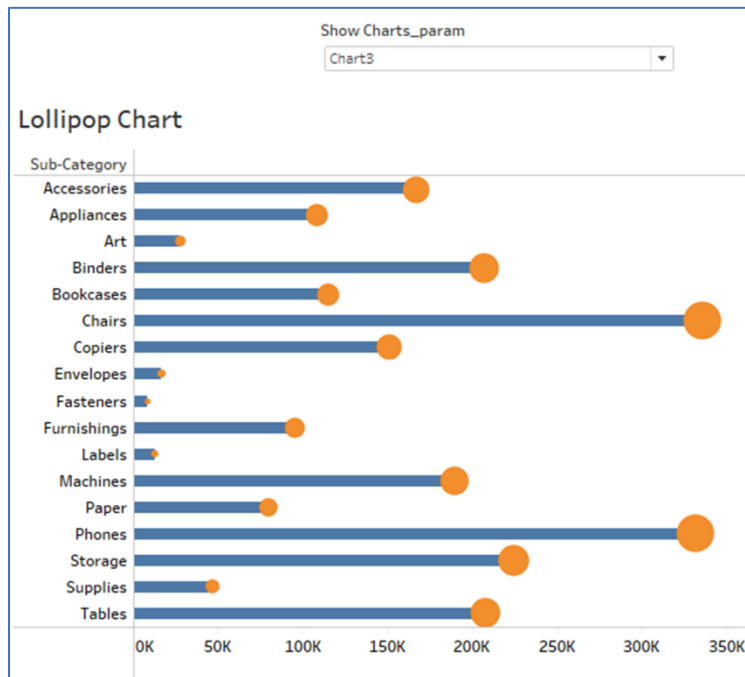


Figure 14.31: Display of chart based on parameter selection.

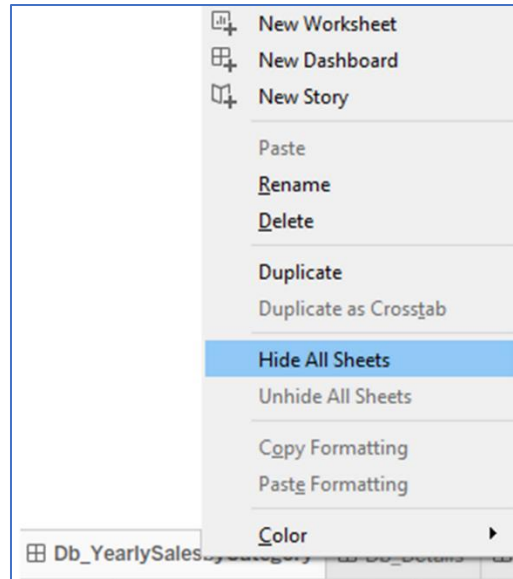


Figure 14.32: Hiding sheets of the dashboard.

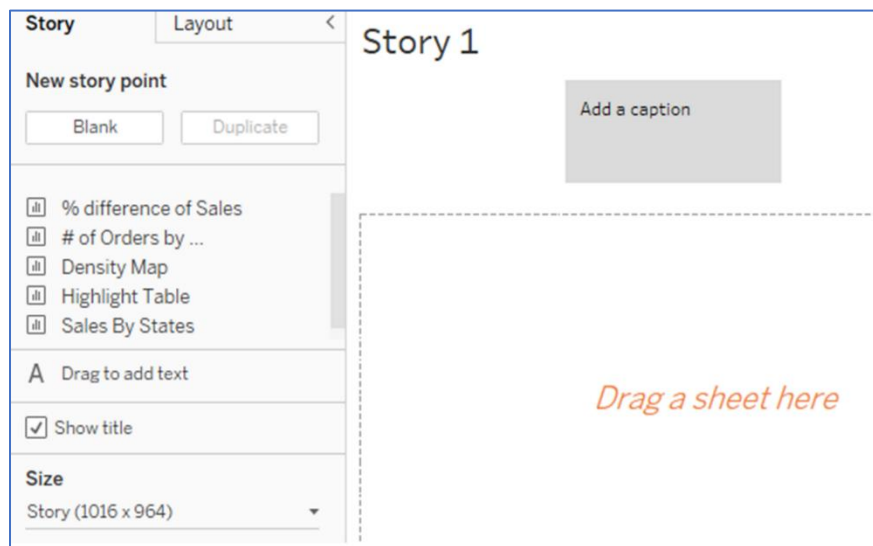


Figure 14.33: The Story Workspace.

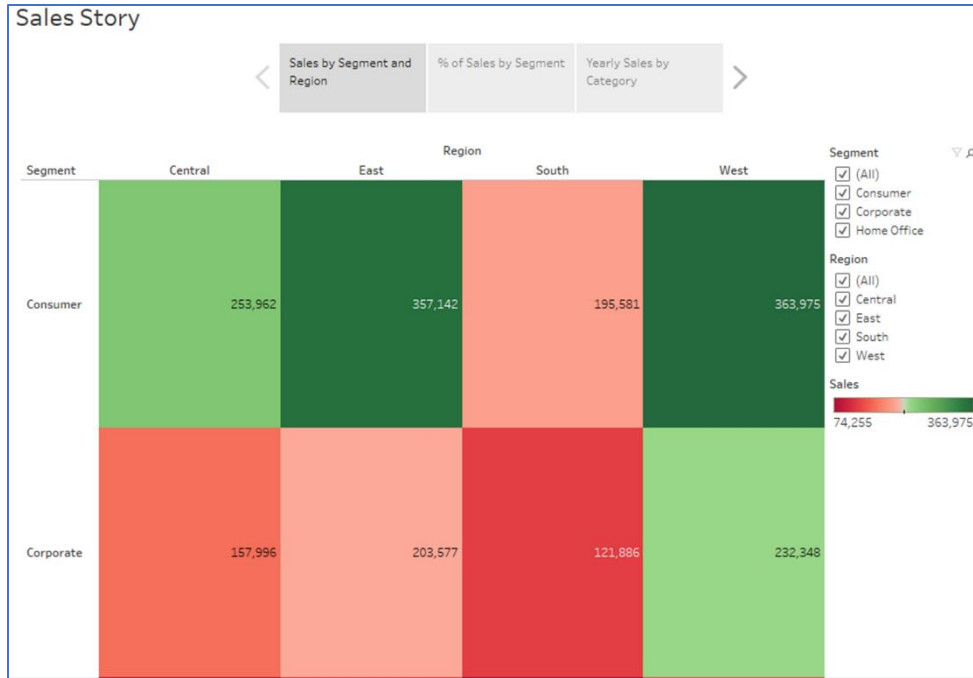


Figure 14.34: Story with three story points.