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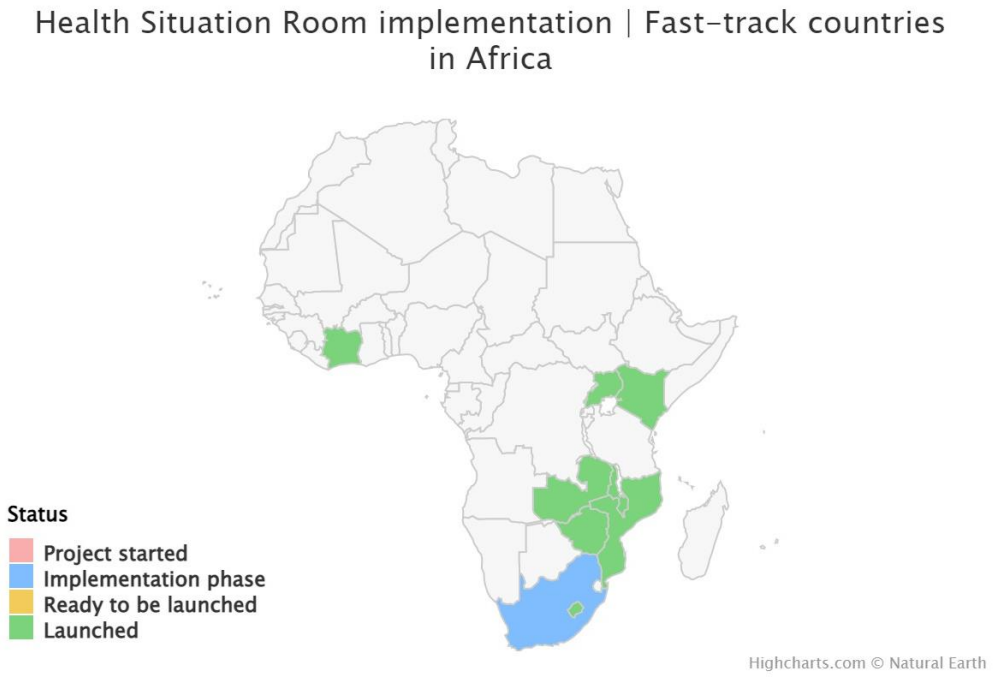
HEALTH SITUATION ROOM USER GUIDE

FOR VIEWERS AND DESIGNERS

2gether 4SRHR

HEALTH SITUATION ROOM USER GUIDE FOR VIEWERS AND DESIGNERS

Issued July 2022



Graphic source: https://situationroom.unaids.org/

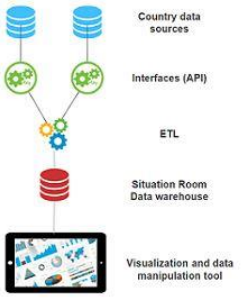
ACKNOWLEDGEMENTS

This user guide has been developed as a collective effort by the UNAIDS Strategic Information (SI) and Information Communication and Technology (ICT) teams at UNAIDS Global Centre, Geneva and the SI team in RST Eastern and Southern Africa in Johannesburg, as well as other stakeholders from the countries implementing the Health Situation Room.

The process involved ongoing consultation with ICT and further consultations made with users of the HSR in the implementing countries for validation and testing of the user guide.

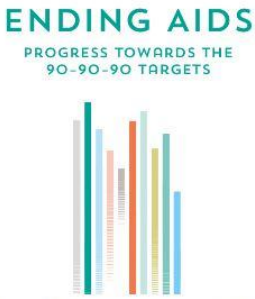
Special thanks go to the Swedish Government's 2gether 4SRHR initiative for financing the project and to UNAIDS for coordinating the whole process.

Discover the Health Situation Room | How, Why & Who



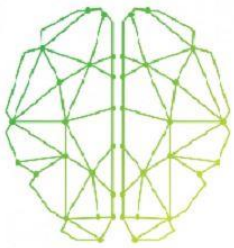
Architecture and components

- The data sources identified by the country.
- A data integration layer (ETL software layer).
- A data store (data warehouse). Data are sourced from national and subnational level systems (DHIS, LMIS, estimates, etc.).
- Visualization software (analytics tool).



Ending AIDS: progress towards the 90–90–90 targets

By 2020, 90% of all people living with HIV will know their HIV status. By 2020, 90% of all people with diagnosed HIV infection will receive sustained antiretroviral therapy. By 2020, 90% of all people receiving antiretroviral therapy will have viral suppression.



The Health Situation Room | UNAIDS Team

The design, the technical work and the hosting is performed by the HSR UNAIDS TEAM.

Graphic source : www.situationroom.unaids.org

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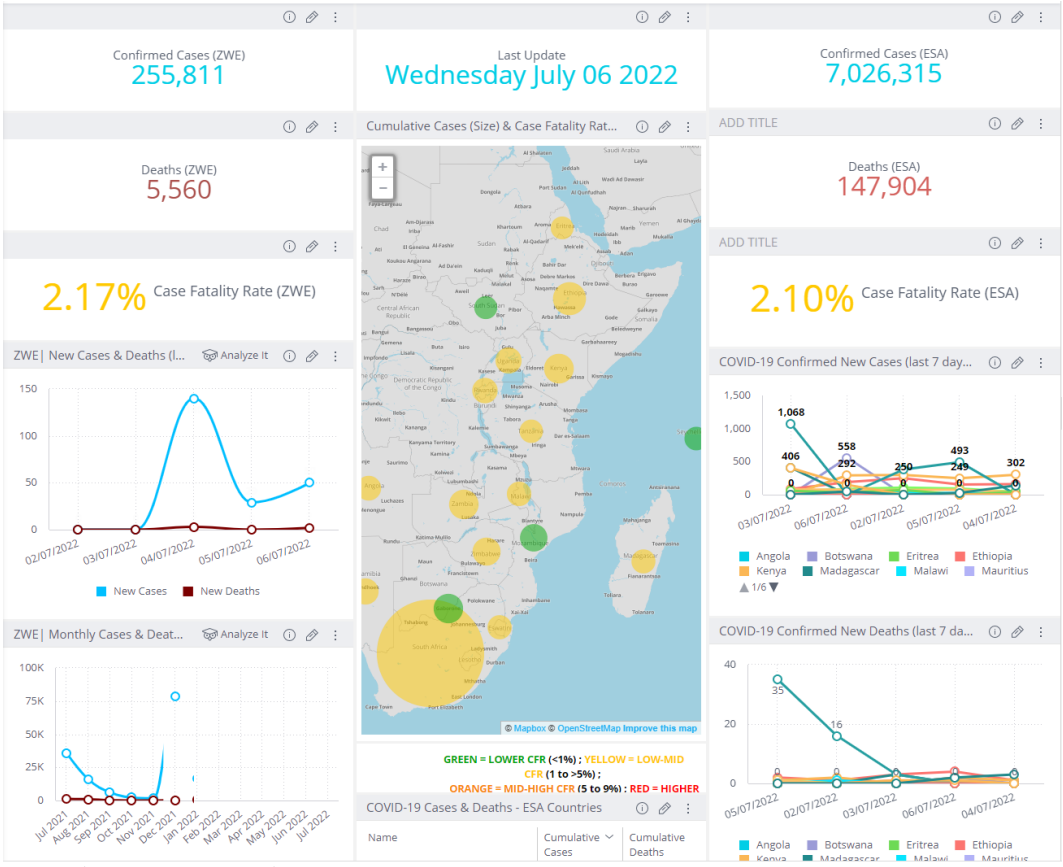
PART 7: WORKING WITH WIDGETS

The Health Situation Room concept



Graphic source : www.situationroom.unaids.org

ABOUT THE HEALTH SITUATION ROOM USER GUIDE

BACKGROUND

The Health Situation Room user guide has been developed as an aid to strengthen the capacity of national staff to manage the data analytics solution and ensure high quality data and information is produced, analysed, and used to inform evidence-based programming and interventions.

The user guide covers the day-to-day function of Sisense users, from those who have 'viewer' access to the more advanced 'designer' access.

In this guide you will find step-by-step instructions on accessing, editing and creating dashboards.

The user guide will also serve as a tool for continuous cascade training for national staff who will train their peers for specific tasks they serve in their national context.

HOW THIS USER GUIDE IS STRUCTURED

The user guide has been colour coded to differentiate between the two categories of Sisense users: viewers and designers.

- The section colour coded in **teal blue** is applicable to everyone.
- The section colour coded in **orange** is for designers only.

INTERACTIVE ELEMENTS

If you are reading the PDF version of the HSR user guide on your computer you will be able to use the interactive elements described in the following table.

Example	Action
Linked cross-references to further information on a topic: ▶▶ See 'Dashboard components explained' on page 10.	Click on the underlined text in the link, to go directly to the content.
Mini table of contents: **In this section**	Each section includes a mini table of contents to advise you what's included in the section. Click on the underlined text in the link, to go directly to the content.

Example	Action
Margin notes ◆ *Edit rights are determined by the dashboard owner.*	Margin notes are used as a visual alternative to traditional footnotes. The symbol◆ in the text indicates a relevant margin note. ⓘ Reading the margin note is highly recommended!
	The lightbulb icon indicates a tip. In most cases, this will be a very short video on the Sisense website to demonstrate a feature.

DISTRIBUTION AND AVAILABILITY

All Health Situation Room country focal points are the keepers of the master PDF copy of the user guide.

Any amendments made to the user guide will be communicated to the focal point who, in turn, will advise all country users.

Please do not hesitate to contact your HSR country focal point to request a copy of the user guide.

Alternatively, you may download a copy of the user guide from the UNAIDS Country Health Situation Room web page: https://situationroom.unaids.org

FEEDBACK

If you have any comments, suggestions for new topics or queries on the content of the *Health Situation Room user guide*, please send them by e-mail in the first instance to the UNAIDS Global Service Desk with a CC to Sanele Masuku, RST ESA, Johannesburg:

gsd@unaids.org

masukus@unaids.org

PART 1: INTRODUCING THE HEALTH SITUATION ROOM

In this section:

About the Health Situation Room

THE HEALTH SITUATION ROOM CONCEPT

The development of the Health Situation Room (HSR) provides the opportunity to strengthen analysis and response within health systems through the use of an innovative platform which allows governments, decision makers and programme managers to easily analyse and view a selection of key indicators relevant to the country. Its main value is its capacity to merge data coming from multiple national data sources (DHIS, LMIS, community data, etc.) into one system.

UNAIDS leadership in this domain positions it also in the UN-wide data revolution initiative and connects with broader health agenda in Sustainable Development Goal 3: Ensure healthy lives and promote well-being for all at all ages.

As part of the global commitment on Fast-Tracking the end of AIDS as a public health threat by 2030, UNAIDS is committed for improving efficient use of real-time data by focusing on location and population, and specifically cities.

THE HEALTH SITUATION ROOM 2015-2022

The Health Situation Room was launched by UNAIDS in 2015 to support the Fast-Track strategy to ending AIDS by 2030, the aim being to enable access to real-time HIV data allowing decision makers to take swift programmatic action and course correction.

Kenya was the first Health Situation Room in 2015, with Cote d'Ivoire, Lesotho, Malawi, Mozambique, Uganda, Zambia, and Zimbabwe joining since then. South Africa is the latest country to join in 2022.

Health Situation Room Sisense licenses

Each country with a Health Situation Room has a Sisense license that allows:

- 100 designers
- 130 viewers
- Two data designers:
  - focal point (centrally located)
  - focal point backup.
- One admin
  - currently performed by the UNAIDS ICT team until platform management is handed over to countries.

See 'Country Sisense admins' on page 6.

Health Situation Room roles

ADMINISTRATOR ROLES

ADMIN ROLE

Admins have access to the Sisense Admin page from where they can manage system configuration, data sources, Elasticubes, users, user groups.◆

DATA ADMIN ROLE

Data admins have access to the Admin page of Sisense: data admins can only manage Elasticubes and live connections and do not have access to user management and system configuration.

Data admins can also add and manage servers for Sisense migration across environments.◆

◆ The admin role and data admin role cannot be delegated as they are linked to a specific license between UNAIDS and Sisense.

DESIGNER ROLES

DATA DESIGNER ROLE

Data designers can:

- Create and edit Elasticubes they created or were shared with them.
- Access to the Admin page of Sisense where they can manage Elasticubes and live connections in the Data Sources page of Sisense.
- Manage data security, hierarchies and build alerts.
- Add new data sources (relational databases, CSV, Excel, etc.)

Data designers do not have access to user management and system configuration.

ⓘ This role can be delegated.

DESIGNER ROLE

Designers create, design, edit and share dashboards.

Designers determine whether a user with whom they share a dashboard has editing rights or view only.

Designers also create dashboard widgets.

See 'Dashboard components explained' on page 10.

This role can be delegated.

VIEWER ROLE

Everyone is a viewer.

Viewers can explore dashboards, make selections and filter dashboards shared with them. Viewers can also drill down in most widgets to get an in-depth view of a selected value.

See 'How to drill down into a widget' on page 20.

Viewers cannot create or edit dashboards or widgets.

Health Situation Room groups

As a Health Situation Room Sisense user, you belong to a group in line with your functions. Each country has three groups: viewers, designers and data designers. The admin roles are currently performed by the UNAIDS ICT team.

Groups have a default language and role.

Users can belong to different groups; allowing customized access; for example to a different set of dashboards.

Groups are named by country code and group type, as follows:

- [Country code] Viewers
- [Country code] Designers
- [Country code] Data Designers

For example, users in Malawi will be in the groups: MWI Viewers, MWI Designers and MWI Data Designers.

Management of the Health Situation Room

WHO DOES WHAT?

UNAIDS ICT

The UNAIDS ICT team is currently responsible for:

- managing the Sisense contract
- developing and maintaining Elasticubes
- managing Sisense users and groups
- managing the overall Sisense instance for all countries.

COUNTRY SISENSE ADMINS

The UNAIDS ICT team will gradually hand over management functions to identified Sisense admins.

Country admins will be responsible for:

- managing Elasticubes, including:
  - adding new data sources
  - build process (data updates)
  - data security and Elasticube sharing
  - hierarchies.
- managing the country Sisense contract.

The data journey: from source data to dashboard

Here is a very quick description of the data models that make up the Health Situation Room: from the source data in the Situation Room data warehouse to the Sisense platform you work with. *See Figure 1. The data journey: from source data to dashboard below.*

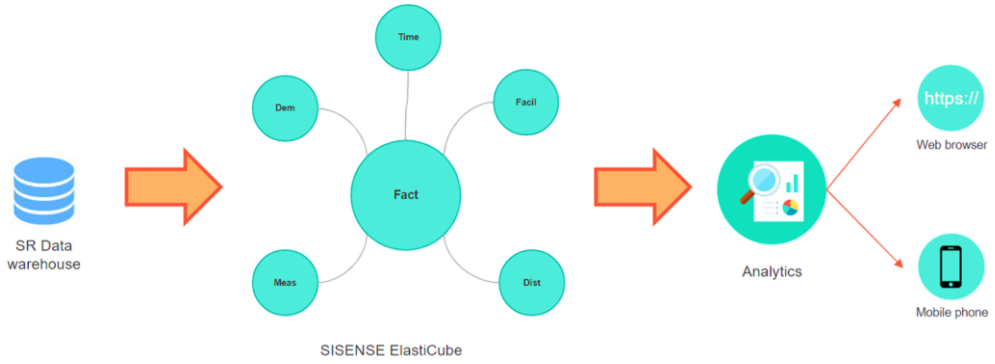


Figure 1. The data journey: from source data to dashboard

SITUATION ROOM DATA WAREHOUSE

The source of all the HSR data is the country data warehouse hosted on a UNAIDS server. From there, specific data is extracted into a Sisense Elasticube and, after additional modelling, is reflected in the Live model.

ELASTICUBES

Sisense Elasticubes are high performance analytical databases, specifically designed to support extensive data querying.

Briefly, Elasticubes:

- are flexible repositories of country data
- act as a buffer between the local data warehouse and the Sisense Analytic platform
- are synchronized with the data source to get live data
- are updated on a daily basis, but this can be modified depending on requirements.

An Elasticube data refresh takes less than five minutes.

-- End of Part 1 --

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PART 2. USING SISENSE

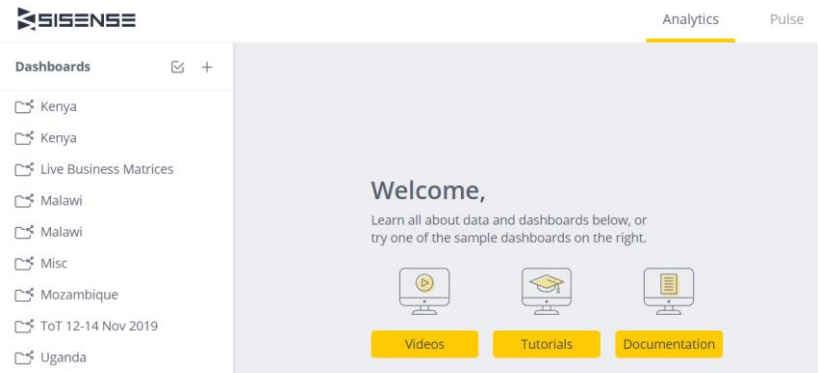
In this section:

Logging in to the Health Situation Room

Step	Action
1	Go to https://situationroom.sisense.com to reach the 'Welcome to Sisense Sign in & start exploring' dialog box.
2	Enter your Sisense account and password credentials.
3	(Optional) Click inside the **Remember me** check box if you do not share your computer, otherwise you can leave this blank.
4	Click on the **Login** button.

WELCOME TO SISENSE

After the login process, you will be presented with list of dashboards and the 'Welcome to Sisense' screen:



Dashboards

The Dashboards column will show the dashboards available to you.

Welcome

The Sisense **Welcome** panel provides you with clickable links to videos, tutorials and documentation provided by Sisense.

Exploring the Sisense screen components

When you log in to Sisense, you will select your dashboard from the Dashboards list. Dashboards are a collection of widgets that visualize the data in the selected dashboard.

You will have access only to your own dashboards and those shared with you. You may interact with dashboards by filtering, drilling down into widgets, etc., but the dashboard display is ‘view only’ to all users other than designers.

The dashboard layout that you see has been created by users with designer rights.

The dashboards you have access to will be shown in the Dashboards column when you log in to Sisense. *See Figure 2. Exploring the Sisense screen components below.*

See ‘Accessing your dashboards’ on page 12.

DASHBOARD COMPONENTS EXPLAINED

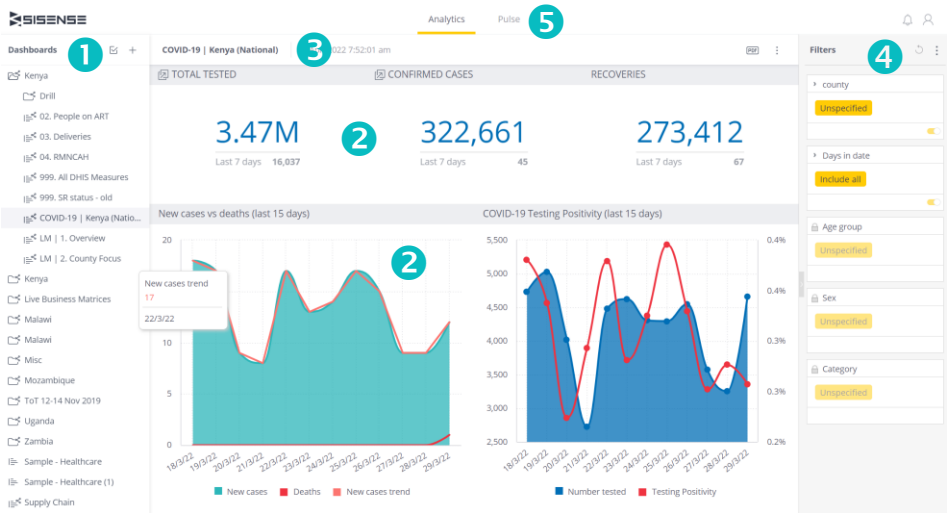


Figure 2. Exploring the Sisense screen components

1 *DASHBOARDS*

This is where you will see the dashboards to which you have access.

2 *WIDGETS*

Widgets are single pieces of information, a dynamic visualization of data.

In the screen capture above, you will see examples of indicator widgets and chart widgets.

Here’s a brief description:

INDICATOR WIDGET

Indicator widgets allow you to display one or two numeric values as a number, gauge or ticker.

You can also add additional titles and a color-coded indicator icon representing the value, such as a green up arrow or a red down arrow.

CHART WIDGET

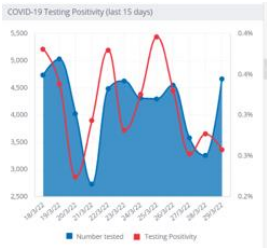


Chart widgets allow you to present data in several formats: bar charts, column charts, pivot tables, etc.

See 'A quick overview of widget types' on page 30.

3 *ELASTICUBE*

You will only see Elasticubes in your dashboards if you are a dashboard owner, data designer or designer.

See 'Elasticubes' on page 7.

4 *FILTERS*

Filters allow users to manipulate several values on a widget.

5 *ANALYTICS | PULSE*

Analytics is the default dashboard display.

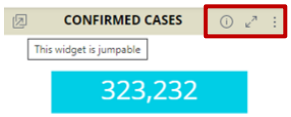
Pulse is where you can store Indicator widgets that you wish to track.

See 'How to add widgets to Pulse' on page 14.

ⓘ Chart widgets cannot be added to Pulse.

THE WIDGET TITLE BAR

All widgets have three standard icons on the right of the title bar. ➲



 Click to view full details.

 Click to switch to full screen display.

The widget title bar (cont'd)

Click to display additonal options.

- Options vary according to widget type. For example, a chart widget will include **Analyze it.**

On the left of the title bar (not always present):

This widget is jumpable

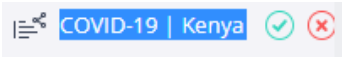
- When present, clicking on the widget will allow you to jump to another dashboard or widget.

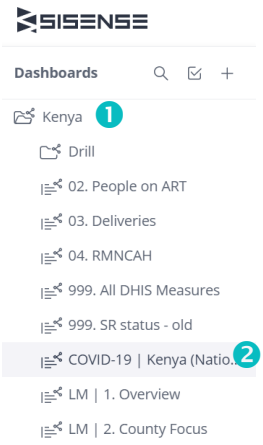
  This functionality applies to chart, pivot table and indicator widgets.

  If you cannot jump:
  - You may not have sufficient edit rights.◆
  - The targeted dashboard no longer exists.

◆ *This function is determined by the dashboard owner.*

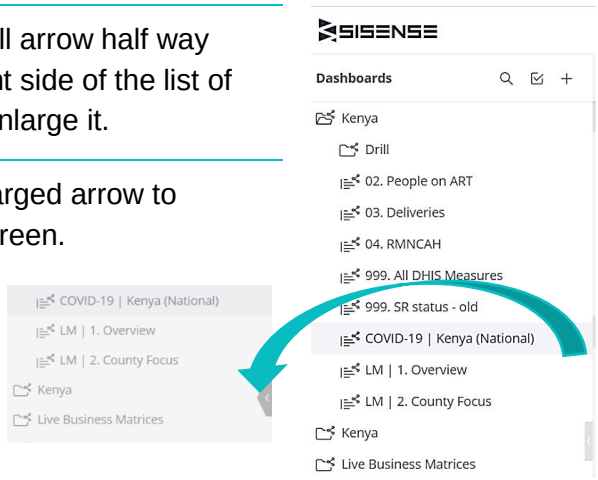
Accessing your dashboards

Step	Action
1	Click on a country name expand the list of dashboards available. In the example opposite, **Kenya** is the country.
2	Click on the dashboard to be opened. - It takes a few seconds for the dashboard to open. Alternatively, you can double-click on the dashboard name and then click on the green tick:.  In the example opposite, **COVID-19 | Kenya (National)** is the selected dashboard.



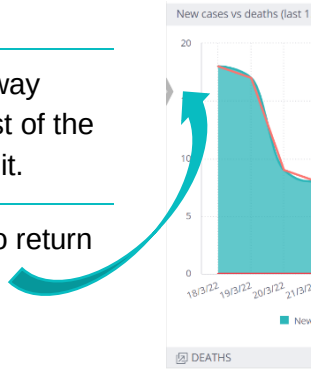
HOW TO MAXIMIZE THE DASHBOARD WINDOW

Step	Action
1	Point to the small arrow half way down on the right side of the list of dashboards to enlarge it.
2	Click on the enlarged arrow to expand to full screen.



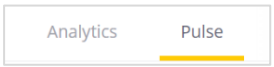
HOW TO RESTORE THE DASHBOARD WINDOW

Step	Action
1	Point to the small arrow half way down on the left side of the list of the maximized screen to enlarge it.
2	Click on the enlarged arrow to return to the combined screen.



Sisense Pulse

WHAT IS PULSE?



You will find **Pulse** next to Analytics on the dashboard menu bar.

Pulse is a centralized location where you can keep your most important widgets from across multiple dashboards. Pulse provides you with access to your most important data and alerts you when to take action.

PULSE DATA ALERTS

WHAT ARE PULSE DATA ALERTS?

Pulse data alerts can be set to notify you when certain thresholds are met or anomalies in your data are detected.

ALERT CONDITIONS

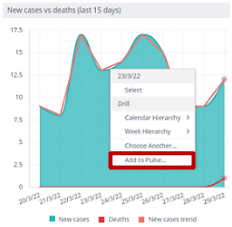
Threshold: Threshold is the default selection. Sisense defines the threshold value as the current value displayed in the widget.

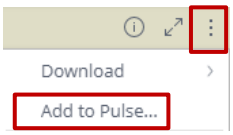
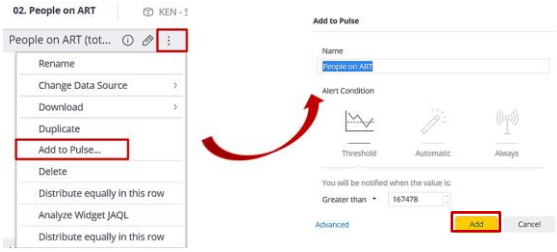
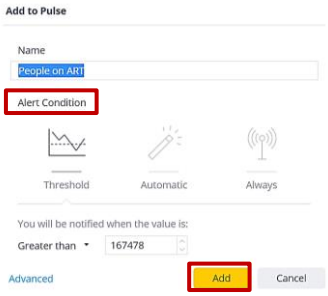
You can increase or decrease this value and define the equality and relational operators that determine when the threshold is met.

Automatic: Sisense automatically identifies anomalies in your data and alerts you.

Always: Sisense notifies you after each build, regardless if there is a change in your data or not.

HOW TO ADD WIDGETS TO PULSE



Step	Action
1	Click on the three-dot vertical ellipsis on the right of the widget's menu to open a dropdown menu. 
2	Click on **Add to Pulse…** ⓘ This method only applies to Indicator widgets. If you don't see Add to Pulse in the menu, right click any value in the chart.
3	Type a name for the Pulse item (by default, it will keep the name from the widget).
4	Click on the **Add** button to include the widget in Pulse. Here's the visual: 
5	(Optional, recommended) Click on **Alert Condition** to select the condition that triggers the alerts. Choose Threshold, Automatic or Always.  See 'Alert Conditions' on page 13.
6	Click on **Add** to include the widget in Pulse and create the alert.

THE PULSE SCREEN LAYOUT

The Pulse screen shows all the widgets you have added to Pulse.

These widgets are live in that they are updated as information changes.

1. A message alert will be indicated on the small bell icon in the top right corner of the Pulse screen to alert you to new activity
2. The colour will change in the widget to alert you to new activity.
3. You will receive an email from Sisense-admin to advise you of the change, inviting you to open Pulse.

See Figure 3. The Pulse screen layout below.

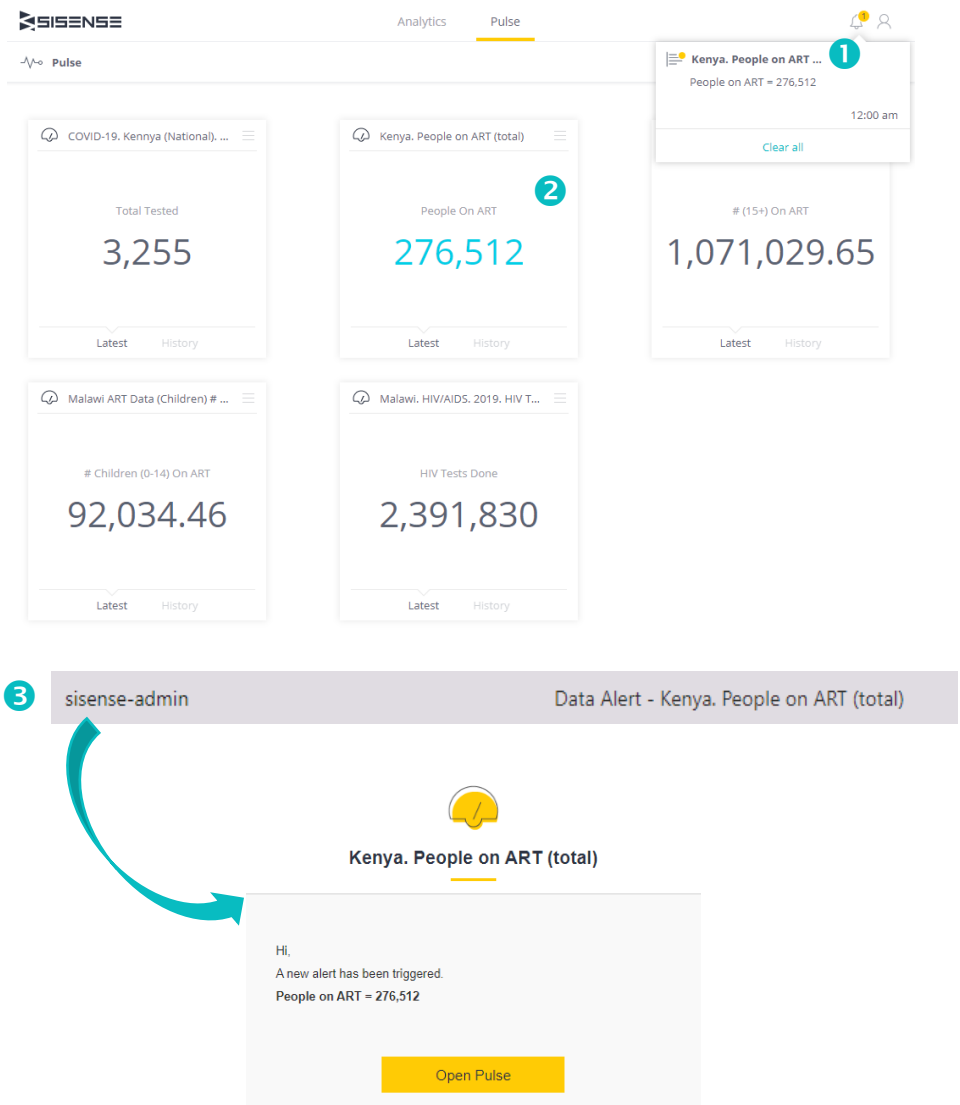


Figure 3. The Pulse screen layout

Sisense Mobile

Dashboards are available anytime, anywhere through the Sisense Mobile BI mobile app.

Sisense Mobile is compatible with Android-versions 4.4 or later and iPhone iOS 9 or later.

HOW TO DOWNLOAD SISENSE MOBILE

Step	Action
1	Click on the applicable link to download Sisense Mobile BI: iPhone: https://itunes.apple.com/us/app/sisense-mobile-bi/id1179696382?mt=8 Android https://play.google.com/store/apps/details?id=com.sisense.mobile.bi&hl=en
2	Open Sisense Mobile using the server address: https://situationroom.sisense.com and
3	Log in to Sisense Mobile with your usual Sisense username and password.

PART 3: WORKING WITH DASHBOARDS: VIEWERS

In this section:

Introduction to filters

> ◆ ***Admins and designers:***
>
> *See 'Part 6: Working with dashboards', 'Creating dashboard filters as a designer' on page 35.*

The content in this section describes the use of filters to those with viewer only access.◆

You cannot see the filters applied and you cannot change them. However, as a viewer, you can make a different selection in the filter controls and save your changes locally.

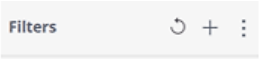
See 'Working with filters as a viewer', 'How to select new dashboard filters' on page 18.

FILTER TERMINOLOGY

Dashboard filters	Dashboard filters affect all widgets in the dashboard (except for widgets that are configured independently).
Widget filters	Widget filters affect only the specific widget to which the filters were applied.

THE FILTERS PANEL

The Filters panel on the right of the dashboard provides data filtering options that affect the data you see in the widgets.



These filters can be changed to focus on specific data.

Your Sisense user role determines how view and interact with filters.

See 'Working with filters as a viewer' on page 18.

Working with filters as a viewer

The **Filters** pane is on the right side of the dashboard screen. *See Figure 4. Filters pane.*

The dashboard filters available have been created by dashboard designers. As a viewer; you can use filters and make new selections, but you cannot change which filters are included, nor can you add new ones.

Filters determine what you see in the dashboard widgets. By changing the filters, you can analyse data in a way that is useful to you.◆

◆ When you change dashboard filters, the change is applied immediately.

Your changes will not affect anyone else.

See 'How to select new dashboard filters' below.

If you change your mind after applying new filters, you can use the **Restore my default filters** option to return to the original filters.

See 'Restoring a saved filters set' below.

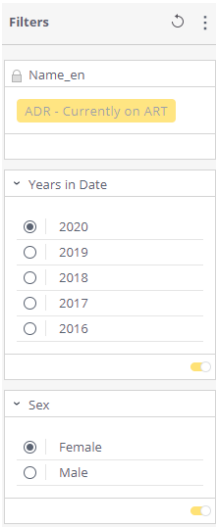


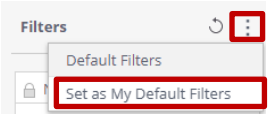
Figure 4. Filters pane

HOW TO SELECT NEW DASHBOARD FILTERS

Step	Action
1	Click on a new selection—or several selections—in the filter controls shown in the Filters pane on the right of the dashboard. *See Figure 4. Filters pane above.*

HOW TO SAVE DASHBOARD FILTER SELECTION

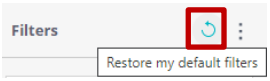
Step	Action
1	Click on the **Filters** menu.
2	Click **Set as My Default Filters**.



RESTORING A SAVED FILTERS SET

If you change your mind after applying new filters, you can use the **Restore my default filters** option to return to the original filters.

Step	Action
1	Click on the Restore icon next to the Filters menu.

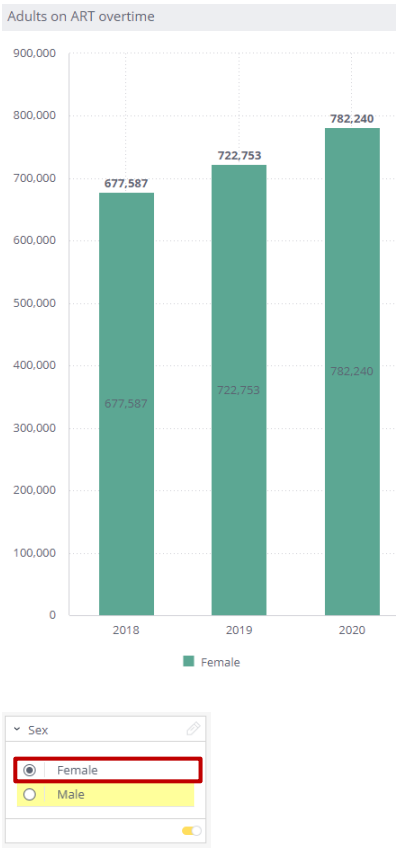


HOW TO SWITCH DASHBOARD FILTERS ON AND OFF

Step	Action
1	Click on the toggle switch in the bottom right corner of the filter to switch on/off with each click. 

Switching on/off gives you the opportunity to compare data with and without the filter.

The graphic below on the left shows the results when the filter 'Female' is applied. The graphic on the right shows the results when the filter is switched off.



Data filter selected: **Female**

Filter toggled to **Off**

Working with widgets

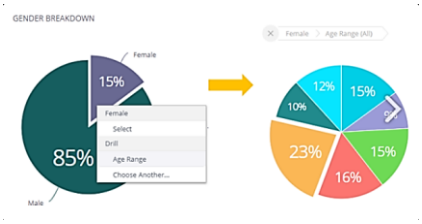
HOW TO DRILL DOWN INTO A WIDGET

WHAT IS DRILLING DOWN?

Drilling down is a process of looking deeper into the data of a selected value.

The example opposite shows a pie chart with values for males and females.

After drilling down into the data for females, you can see a breakdown of age ranges. ➲



ⓘ You can drill down from any field to any field unless this has been disabled by the dashboard designer.

You may wish to watch a short one-minute video to familiarize yourself with the process before drilling down for the first time: https://documentation.sisense.com/docs/drilling-down-in-a-widget

HOW TO DRILL DOWN IN A CHART

Step	Action
1	Right click o the item in the widget into which you want to drill down. ■ In the example in 'What is drilling down?' above, this would be the Female slice of the pie chart.
2	Select **Choose Another…** ■ You may see predefined drill hierarchies if any have been defined by the dashboard owner.
3	Click on the level for which you want to drill down to see the specific data.

Downloading dashboards in different formats

Dashboards can be downloaded as PNG images or PDF files. Dashboards may also be sent as email reports.

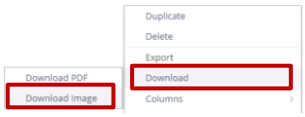
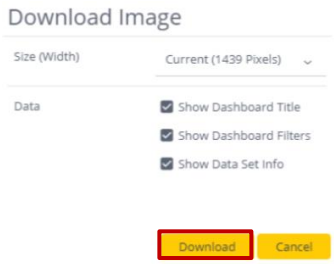
See 'How to download a dashboard as an image' on page 21.

See 'How to download a dashboard as a PDF' on page 21.

HOW TO DOWNLOAD A DASHBOARD AS AN IMAGE

You may wish to download a dashboard as an image to include in a report, a presentation or to add to the Intranet.

When you download a dashboard as an image, the resulting image will show its current status and will include filters you have applied to the dashboard.

Step	Action
1	Click on the three-dot vertical ellipsis in the top right of your dashboard to open a dropdown menu.
2	Select **Download** and then **Download Image** ➲ 
3	Select/deselect the '☑ Show …' options in the Download Image dialog box. ➲ 
4	Click on **Download**. ⓘ Microsoft Edge, Google Chrome and Firefox will normally save downloaded files in the Downloads folder on your computer.◆
5	(Optional, recommended) Open the folder containing the image and save the image to a named folder for safe keeping.

◆ *If you do not find the downloaded file in the Downloads folder, open your browser and press* Ctrl+J *on your keyboard to open the download history tab.*

HOW TO DOWNLOAD A DASHBOARD AS A PDF

Downloading a dashboard as a PDF report is an easy way of keeping a copy of dashboard data or for sharing information with others.

You may wish to watch a short two-minute video to familiarize yourself with the process before you make your first PDF download: https://documentation.sisense.com/docs/creating-pdf-reports

CUSTOMIZING A PDF REPORT

Step	Action
1	Click the **PDF** button in the top right corner of the dashboard to open the PDF Reports Settings page.
2	Select **Edit** mode. ➲
3	Drag the borders of each widget to set the size.
4	Choose the **Paper Size** and **Orientation** for your PDF report. Select the information you would like to appear in the **Header** from the left menu. ■ You may edit the header—also its size and alignment—in the Preview area.◆
5	Click on **Save** to save the changes you have made. *or* Click on the download button to download your PDF report. ➲  ⓘ Microsoft Edge, Google Chrome and Firefox will normally save downloaded documents in the Downloads folder on your computer.◆
6	(Optional, recommended) Open the folder containing the downloaded PDF and save the document to a named folder for safe keeping.

◆ *If you cannot perform any of the actions described, this will be due to restrictions set by the dashboard*

◆ *If you do not find the downloaded file in the Downloads folder, open your browser and press* Ctrl+J *on your keyboard to open the download history tab.*

SISENSE DESIGNER ROLE FUNCTION

Milestones

- **Coming Soon** | National launch in South Africa
- **February 2022** | National launch in Mozambique
- **June 2019** | National launch in Zimbabwe
- **April 2019** | National launch in Malawi
- **May 2018** | National launch in Lesotho
- **March 2018** | National launch in Cote d'Ivoire
- **March 2018** | National launch in Uganda
- **March 2018** | National launch in Zambia
- **2015** | Pilot project in Kenya

Graphic source : www.situationroom.unaids.org

About the Sisense designer role

WHAT YOU CAN DO AS A DESIGNER

As a designer you can:

- Create, design, customize, edit and share dashboards.
- Create dashboard widgets.
- Create dashboard filters.
- Export, import and duplicate dashboards.
- Determine whether a user with whom you share a dashboard has editing rights or view only.

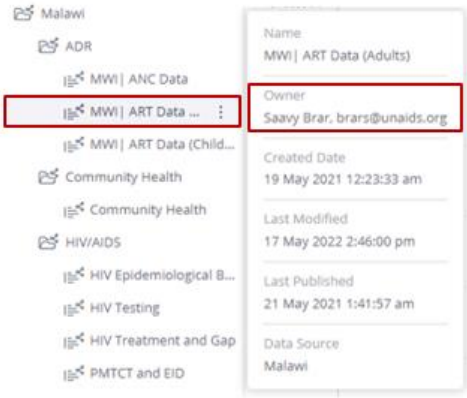
These functions are described in detail in this section of the user guide.

RESTRICTIONS YOU MAY FACE

The functions assigned to you as a designer apply to your own dashboards or those shared with you by a dashboard owner who has given you edit rights.

If you find that some functionality described in this user guide does not work, this is most likely because you have not been assigned editing rights by the owner.

Point to the dashboard in the Dashboards list on the right of the Sisense screen to see the owner details. ➲



Did you know that …

… you can duplicate another designer's dashboard and make it your own! You will then become the owner with full editing capabilities.

The original dashboard will not be affected by any edits you make.

See 'Duplicating a dashboard' on page 45.

COLLABORATION ON DASHBOARD DESIGN

There may be instances where a dashboard has been designed, but other designers will collaborate on the content or design.

Since dashboards are owned by the original designer, collaboration will require either the transfer of ownership to another designer or granting edit rights to another designer. Each is described below.

TRANSFERRING OWNERSHIP OF A DASHBOARD

Step	Action
1	Click on **Share** In the heading of the dashboard. *or* Click on **Share** in the dashboard in the Dashboards list.
2	Enter the name of the designer to whom ownership transfer will be made.
3	Select **Make Owner** for the user to whom you are transferring ownership.
4	Click on **Save**.
5	Click on **OK** to confirm that you want to transfer ownership to the selected user.

SHARING AN EDITABLE DASHBOARD WITH ANOTHER DESIGNER

Step	Action
1	Click **Share** in the dashboard heading.
2	Enter the email address of the user with whom you wish to share the database.
3	Click on the dropdown list and select **Designer (can edit)**.
4	Click on **Save**.

See 'Sharing dashboards' on page 42 for more detailed information on dashboard sharing.

WORKING ON ANOTHER DESIGNER'S DASHBOARD

Scenario 1: *A designer has given you ownership of a dashboard*

You now own the database, so you may edit and change dashboard elements without restrictions.

The original design will be lost and replaced by the edited version.

Scenario 2: *A designer has given you edit rights to a dashboard*

- Changes made to the dashboard are visible only to you.

You will discuss the changes you have made with the original designer to decide if your changes will be implemented.

Scenario 3: *You have duplicated the original dashboard.*

- You now own the duplicated dashboard and can edit freely.

After making changes to your version of the dashboard, you will share this new version with the designer of the original dashboard.

See 'Sharing an editable dashboard with another designer' on page 24.

Both designers examine the two versions and decide which version will be implemented.

Changes can be made either on the original dashboard or the new version can be made official.

-- End of Part 3 --

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PART 4: BUILDING DASHBOARDS

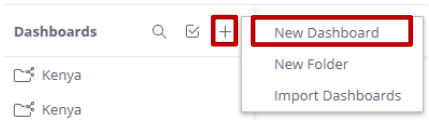
In this section:

Creating a new dashboard

Dashboards are created based on the data selected from one or more ElastiCubes or Live data sources.

To create a dashboard, you will need to be on the Analytics page.

You may wish to watch a short two-minute video to familiarize yourself with the process before you start creating your new dashboard: https://documentation.sisense.com/docs/creating-dashboards

Step	Action
1	Click on the **+** at the top of the Dashboards list. 
2	Click on **New Dashboard**.
3	Click on **Choose Data Source**. ■ Note that the Title field has already been populated with the same name as the data source.
4	Click on the name of the dataset displayed to select the Elasticube or Live Data model you want to work with. ⓘ An Elasticube is indicated with next to its name. ⓘ A Live Data model is indicated with next to its name.
5	(Optional) Click the **Title** field and change the name for your new dashboard.◆ ⓘ This name will appear at the top of the dashboard and also in the Dashboards list.

◆ *Do not use a forward slash ('/') in a dashboard name.*

(Step/Action continued on next page)

(Step/Action continued from previous page)

Step	Action
6	Click on **Create** to start the Widget Wizard that will guide you through the creation process. Using the Widget Wizard is the simplest way to create a dashboard. **Advanced Configuration** in the bottom left corner of the wizard will provide you with more design options. See 'How to add widgets using the Widget Wizard' below.

Adding widgets to a dashboard

HOW TO ADD WIDGETS USING THE WIDGET WIZARD

You may wish to watch a short three-minute video to familiarize yourself with the process before you start adding widgets for the first time: https://documentation.sisense.com/docs/adding-widgets-to-a-dashboard

See also 'Part 7: Working with widgets' on page 47.

Step	Action	
1	**If …**	**Then …**
	This is the *first widget* in your new dashboard	Click on + Select Data to open the Sisense Data Browser.
	You *already have widgets* in your dashboard	Click on the + Widget button.
	You want to select data from a different Elasticube	Click **from** on the right side of the New Widget window and select the Elasticube that contains the data.
2	Add a title for your new chart widget.	
3	Click on **+ Select Data** in the New Widget screen.	

(Step/Action continued on next page)

(Step/Action continued from previous page)

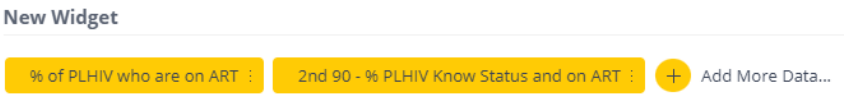
Step	Action
4	Select the category that contains the data. ⓘ As soon as you select the category, a panel of widget types will be shown. Sisense will determine the type of widget based on your selection, indicated with a yellow circle. *See Figure 5. Widget types.* **If …** / **Then …** If you selected a numeric field — The widget type will be an Indicator widget. If you selected a descriptive field — The widget type will be a Pivot widget. The widget type can be changed when you are ready to finalize your widget by clicking on a new widget icon.
5	Add a field from the selected category.
6	Click on **+ Add More Data**… to select more fields. Repeat to complete your chart data. ■ Each time you add a field, it will be added to the New Widget window: 
7	Choose your chart style from the panel on the left. ■ Your selection will be indicated with a yellow circle. 
8	Click on **Create** to finalize your widget and add it to the dashboard.

Figure 5. Widget types

Which type of widget suits your data?

The table below shows widget types available, describing the basic characteristics of each.

Click on the underlined widget type text to find more detailed information on the Sisense website.

A QUICK OVERVIEW OF WIDGET TYPES

Area Line	X-axis usually time data (Categories) Y-axis usually numeric data (Values)	■ At least one item required in Categories, maximum two items ■ At least one field required in Values
Column Bar	X-axis usually descriptive data (Categories) Y-axis usually numeric data (Values)	■ At least one item required in Categories, maximum two items ■ At least one field required in Values
Pie	Slices are typically descriptive data (Categories) Slice size represents numeric data (Values)	■ Only one field in Categories ■ Only one field in Values
Scatter	Data points on map (Location)	■ Fields that contain geographic data (country, city, state/province, latitude/longitude)
Pivot	Rows Columns	■ Up 20 fields in Rows ■ Up to three fields in Columns
Table	Rows and columns	Customizable
123 Indicator	One or two numeric values	■ One Main field (title and value) ■ One Secondary field (title and value)

PART 5: DASHBOARD DESIGN AND CUSTOMIZATION

In this section:

Default dashboard design

DASHBOARD VIEWS

> ◆ *Remember!*
> *If you cannot perform any of the actions described, this will be due to restrictions set by the dashboard owner.*
>
> *See 'Restrictions you may face' on page 23 if you need to find the details of the dashboard owner.*

LAYOUT MODE

Layout mode is the default display. You can add new widgets and you can also rearrange them.◆

See 'How to rearrange dashboard widgets' below.

VIEW MODE

View mode show you what a dashboard looks like when a user is only viewing the dashboard. Dashboards cannot be rearranged or edited when in view mode.

If …	Then …
If you are in **View** mode	You will see a pencil icon in the top right corner of the dashboard screen. ➲  ■ Click on the pencil icon to switch to Layout mode.
If you are in **Layout** mode	You will see a screen icon in the top right corner of the dashboard screen. ➲  ■ Click on the screen icon to switch to View mode.

Dashboard customization options

HOW TO REARRANGE DASHBOARD WIDGETS

By default, widgets are arranged one beneath the other. When new widgets are added, they appear at the bottom of the dashboard. A widget cannot span more than one column.

> You may wish to watch a short one-and-a-half minute video to familiarize yourself with the process before you customize your dashboard: https://documentation.sisense.com/docs/customizing-the-dashboard-layout

REARRANGING THE ORDER OF WIDGETS

Step	Action
1	Make sure you are in Layout mode. See 'Dashboard views', 'Layout mode' above.
2	Select the widget by its title and drag it to its new position.

PLACING WIDGETS SIDE BY SIDE

Widgets can be placed side by side by using one of the following options:

Place each widget in a different column.

or

Drag one widget on top of the other. Both widgets will then be in the same column if space permits.

RESIZING WIDGETS

Widgets can be resized by using one of the following options:

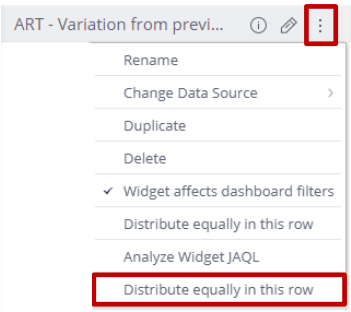
Drag the edge of the column in which the widget is located to the left or right. This action automatically resizes the widgets to match the new column width.

or

Resize the widget by dragging its edges left, right, up or down.

DISTRIBUTING WIDGETS EQUALLY IN A ROW

Step	Action
1	Click on the three-dot vertical ellipsis in the top right of any of the widgets in a row to open a dropdown menu.
2	Select **Distribute equally in this row**. ➲



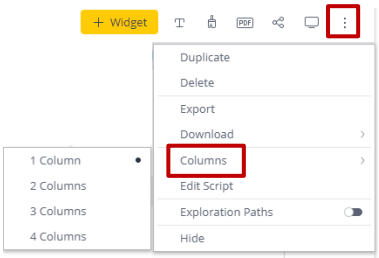
HOW TO ADD COLUMNS TO A DASHBOARD

By default, the dashboard is organized in a single column.

ADDING DASHBOARD COLUMNS

You can add up to four columns. Each column can contain multiple widgets, but a widget cannot span more than one column.

Step	Action
1	Click on the three-dot vertical ellipsis in the top right of your dashboard to open a dropdown menu.
2	Select **Columns** and then the number of columns, up to a maximum of four. ➲



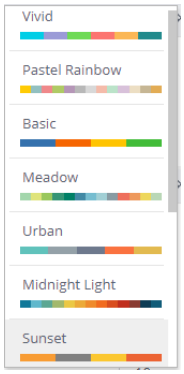
HOW TO CHANGE A DASHBOARD COLOUR PALETTE

DEFAULT COLOUR PALETTE

The default dashboard palette is **Vivid**.

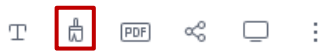
The palettes ColorBlind 1, 2 and 3 are suitable for colour blindness.

You may wish to watch a short one-and-a-half minute video to familiarize yourself with the process before you customize your dashboard: https://documentation.sisense.com/docs/changing-the-dashboards-color-palette



You can easily change the colour scheme of your dashboard to suit your preference/colour brand builder.

Here's how:

Step	Action
1	Click on the small paintbrush icon in the top right of your dashboard. 
2	Click on one of the available options in the colour palette. ■ Use the vertical scroll bar to see all the colour options.

If …	Then …
If you apply a colour to an individual widget that is *not* in the colour palette.	The new colour will be applied to the widget.
If you change the colour of the dashboard from the colour palette	The colour of any individually changed widgets with colours not in the colour palette will be changed to match the change to the dashboard.

PART 6: WORKING WITH DASHBOARDS: DESIGNERS

In this section:

Creating dashboard filters as a designer

◆ *If you have viewer access only, see 'Working with filters as a viewer' on page 18.*

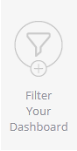
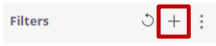
As a Sisense admin/designer◆ you can:

- Create filters to distribute them to viewers who interact with your dashboard.
- Define which data values are displayed in a widget.

You may wish to watch a short two-minute video to familiarize yourself with the process before you create your first dashboard filter: https://documentation.sisense.com/docs/creating-dashboard-filters

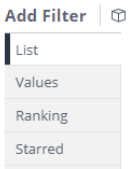
HOW TO CREATE DASHBOARD FILTERS

◆ *Filters applied to fields from one data source do not affect fields from another data source, even on the same dashboard.*

Step	Action	
1	**If …**	**Then …**
	This is the *first filter* in your dashboard	Click on **Filter Your Dashboard** in the panel on the right side of the dashboard. 
	You *already have filters* in your dashboard	Click on the **+** sign in the Filters menu. 
	You want use multiple data sources ◆	Select the data source containing the fields you want to filter.

(Step/Action continued on next page)

(Step/Action continued from previous page)

Step	Action
2	Select the field on which you want to filter from the list under Add Filter.
3	Select the type of filter from the pane on the left. ⓘ The options available in this window will vary according to the selected field type. 
4	Click on each of the filter types to set the required filtering details. Filters include: ■ Include/Exclude Filter ■ Text/Numeric/Date Filter ■ Top/Bottom Ranking Filter ■ Calendar Filter ▶▶ See 'Types of dashboard filters' on page 37.
5	Click on **OK** to filter the data in the dashboard and add this filter to the Filters panel on the right of the dashboard.◆

◆ *Your saved filters will be visible to shared users.*

REARRANGING FILTERS IN THE FILTERS PANEL

Step	Action
1	Click on the filter you wish to move and drag it to its new position in the list.

Types of dashboard filters

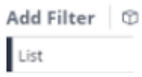
INCLUDE/ EXCLUDE FILTER

An Include/Exclude filter allows you to define whether selected field values are included or excluded.

You can decide whether the selection of list filters is restricted to multi-selection or single selection.

See 'Multi-selection or single selection?' below.

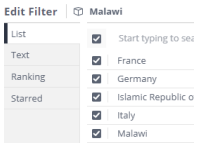
See step 1 in 'How to create dashboard filters' on page 27.

Step	Action
1	Create your dashboard filter. ■ Click on either **Filter Your Dashboard** (if this is your first dashboard filter) or the **+** sign (if you already have dashboard filters) in the panel on the right side of the dashboard. *or* Edit an existing filter. ■ Click on the pencil icon in the widget heading.
2	Choose a field for which you want to filter.
3	Select the **List** option in the Add Filter or Edit Filter panel. 
4	Select or deselect the values to be included or excluded. ■ Check the preview of the results before you complete the filter.
5	Click on **OK** to add your new filter to the Filters panel.

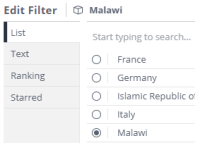
MULTI-SELECTION OR SINGLE SELECTION?

The toggle button in the top right corner of the include/exclude filter will switch between multi-selection and single selection:

Use the tick boxes ☑ to make multiple selections.



Use the radio button ⦿ to make a single selection.



TEXT FILTER

A Text filter allows you to filter according to text matching.
Text filters are not case sensitive.

You may wish to watch a short two-and-a-half minute video to familiarize yourself with the process before you create your first text filter: https://documentation.sisense.com/docs/creating-dashboard-filters

See step 1 in 'How to create dashboard filters' on page 27.

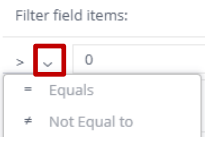
Step	Action
1	Create your dashboard filter. ■ Click on either **Filter Your Dashboard** (if this is your first dashboard filter) or the **+** sign (if you already have dashboard filters) in the panel on the right side of the dashboard. *or* Edit an existing filter. ■ Click on the pencil icon in the widget heading.
2	Choose a field for which you want to filter.
3	Select the **Text** tab.
4	Select the operator under Filter field items:, for example, 'Starts with', 'Containing', 'Equals'.
5	Complete the 'Type here…' with the value by which to filter. ■ Check the preview of the results before you complete the filter.
6	(Optional) Click on **+ Add condition** if you require additional conditions. In this case, you will need to select **AND** or **OR** to define how the filter operators are combined
7	Click on **OK** to add your new filter to the Filters panel.

NUMERIC VALUE FILTER

A Numeric Value filter allows you to limit your filter to specific value ranges; for example, keep above 6,000 or keep between 1,000 and 6,000.

You may wish to watch a short two-minute video to familiarize yourself with the process before you create your first numeric value filter: https://documentation.sisense.com/docs/creating-dashboard-filters

See step 1 in 'How to create dashboard filters' on page 35.

Step	Action
1	Create your dashboard filter. ■ Click on either **Filter Your Dashboard** (if this is your first dashboard filter) or the **+** sign (if you already have dashboard filters) in the panel on the right side of the dashboard. *or* Edit an existing filter. ■ Click on the pencil icon in the widget heading.
2	Select the **Values** tab.
3	Select the operator from the list under **Filter field items**. 
4	Type in the value by which to filter. ■ Check the preview of the results before you complete the filter.
5	(Optional) Click on **+ Add condition** if you require additional conditions. In this case, you will need to select **AND** or **OR** to define how the filter operators are combined
6	Click on **OK** to add your new filter to the Filters panel.

TOP/BOTTOM RANKING FILTER

A Top/Bottom Ranking filter allows you to select whether to include only the top/bottom ranking fields.

◆ *See step 1 in 'How to create dashboard filters' on page 35.*

Step	Action
1	Create your dashboard filter. ■ Click on either **Filter Your Dashboard** (if this is your first dashboard filter) or the **+** sign (if you already have dashboard filters) in the panel on the right side of the dashboard.◆ *or* Edit an existing filter. ■ Click on the pencil icon in the widget heading.
2	Choose a field for which you want to filter.
3	Select the **Ranking** tab.
4	Select **Top** or **Bottom** and the number of items to include.
5	Select a field in the **By** field by which to rank the fields. ■ Check the preview of the results before you complete the filter.
6	Click on **OK** to add your new filter to the Filters panel.

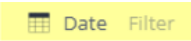
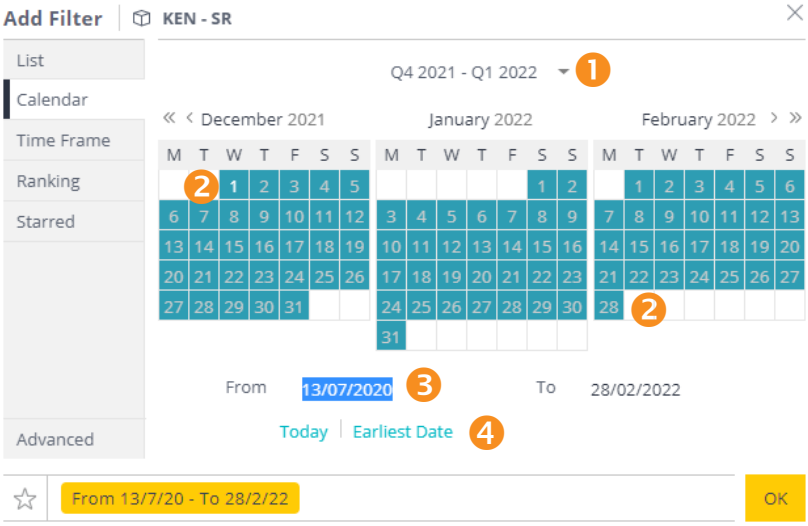
DATE FILTER

A Date filter gives you the option to use several types of date filtering, among them are Calendar and Dynamic Time filters. Each is described below.

You may wish to watch a short two-minute video to familiarize yourself with the process before you create your first date filter: https://documentation.sisense.com/docs/creating-dashboard-filters

CALENDAR FILTER

A Calendar filter allows you to select custom date ranges from a calendar.

Step	Action
1	Create your dashboard filter. ■ Click on either **Filter Your Dashboard** (if this is your first dashboard filter) or the **+** sign (if you already have dashboard filters) in the panel on the right side of the dashboard.◆ *or* Edit an existing filter. ■ Click on the pencil icon in the widget heading.
2	Click on **Date filter** from the Add Filter list. ➲ 
3	Select the **Calendar** tab.
4	❶ Use the quick navigation menu to jump to a specific Q1-Q4 range. ❷ Select a date/date range: – Click on the start date in the relevant month/year calendar. – Click on the end date in the relevant month/year calendar. ❸ Type in the dates. ❹ Use the 'Today' or 'Earliest Date' link (Latest Date link is visible after Earliest Date is selected.)◆ 
5	Click on **OK** to add your new filter to the Filters panel.

◆ *See step 1 in 'How to create dashboard filters' on page 35.*

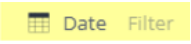
◆ *Don't be surprised if the dates in the filter do not match the dates you indicated:*

***Earliest Date** and **Latest Date** refer to the earliest and latest dates with data.*

DYNAMIC TIME FILTER

A Dynamic Time filter allows you to filter dashboards to pre-set timeframes; for example, ‘Last Year’, ‘Last 2 Years’.

See step 1 in ‘How to create dashboard filters’ on page 35.

Step	Action
1	Create your dashboard filter. ■ Click on either **Filter Your Dashboard** (if this is your first dashboard filter) or the **+** sign (if you already have dashboard filters) in the panel on the right side of the dashboard. *or* Edit an existing filter. ■ Click on the pencil icon in the widget heading.
2	Click on **Date filter** from the Add Filter list. 
3	Select the **Time Frame** tab.
4	Click on the button to choose your time frame.
5	Click on **OK** to add your new filter to the Filters panel.

Sharing dashboards

Dashboards can be shared or exported with users and/or groups. Sharing and exporting have different results, each of which is described below.

SHARING OR EXPORTING: WHAT’S THE DIFFERENCE?

WHEN YOU SHARE A DASHBOARD

A link is created between the original dashboard and the shared dashboard.

When changes are made to the original dashboard and it is republished, the shared dashboards will reflect those changes.

Ownership of dashboards can be transferred.

See ‘How to share a dashboard’ on page 43.

WHEN YOU EXPORT A DASHBOARD

The exported dashboard is a static copy of the dashboard; it is downloaded as a *.dash* file.

An exported dashboard can be sent to other users by email; they can then import the dashboard into their own Sisense account.

Exporting a dashboard *does not create a link to it*. Changes made on the original dashboard after exporting it are not reflected in the exported dashboard.

See 'Exporting a dashboard' on page 44.

HOW TO SHARE A DASHBOARD

Step	Action
1	Click the **Share** icon in the dashboard header.
2	Enter the email addresses or groups of users with whom you wish to share the database. The contact information of the users you add will be shown in the centre of the window and will also be shown the next time you open this window. If users do not have a Sisense account, they will receive a link that takes them through the activation process.
3	Click on the dropdown list next to each user or group and select whether this user will be a Designer (can edit) or a Viewer (can view).
4	Toggle the **Email Reports** button next to each user or group to indicate if this user will receive scheduled email reports of the dashboard. This option can be very useful. See 'Dashboard email reports' below.
5	(Optional) Copy the Dashboard URL at the bottom. This is a direct link to the dashboard that you can paste into an email message if you wish.
6	Click on **Save**.

DASHBOARD EMAIL REPORTS

Whenever changes are made to a shared dashboard, users will receive an email alert from sisense-admin@sisense.com listing the changes made.

Exporting a dashboard

Dashboards can be shared with other users, either by exporting or sharing.

Exporting and sharing have different results, each is described below.

EXPORTING OR SHARING: WHAT'S THE DIFFERENCE?

WHEN YOU EXPORT A DASHBOARD

The exported dashboard is a static copy of the dashboard; it is downloaded as a *.dash* file.

An exported dashboard can be sent to other users by email; they can then import the dashboard into their own Sisense account.

Exporting a dashboard *does not create a link to it*. Any changes made on the original dashboard after exporting it are not reflected in the exported dashboard.

See 'How to export a dashboard' below.

WHEN YOU SHARE A DASHBOARD

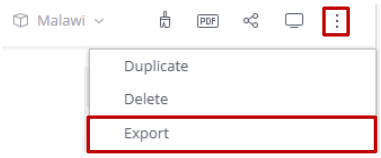
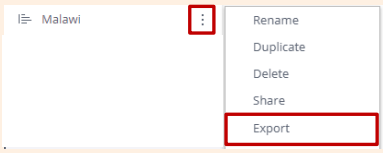
A link is created between the original dashboard and the shared dashboard.

When changes are made to the original dashboard and it is republished, the shared dashboards will reflect those changes.

Ownership of dashboards can be transferred.

See 'Sharing dashboards' on page 42.

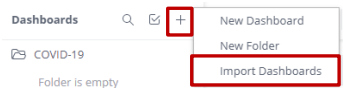
HOW TO EXPORT A DASHBOARD

Step	Action	
1	*While you are in the dashboard:* Click on the three-dot vertical ellipsis in the top right of your dashboard to open a dropdown menu.  	*From the Navigation pane:* Click on the three-dot vertical ellipsis on the right of the dashboard name to open a dropdown menu. 
2	Select **Export**.◆	Select **Export**.◆
3	The dashboard will be downloaded as a *.dash* file.	

◆ *If you do not see the option to Export, this is due to restrictions placed on the dashboard by the owner.*

Importing a dashboard

HOW TO IMPORT A DASHBOARD

Step	Action
1	Click the + symbol on the Dashboards menu. 
2	Select **Import Dashboards**. ■ This action will open Windows Explorer.
3	Navigate to the folder to select the folder where you saved the exported *.dash* file shared with you and click on **Open**. ■ This action will add the imported dashboard to your list of dashboards or folders.
4	Drag the dashboard to its new location.

Duplicating a dashboard

Duplicating a dashboard creates a new copy of the dashboard with a number appended to the name of the original dashboard.

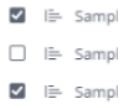
The new dashboard is not connected with the original dashboard and you will be the owner of the new dashboard with full editing rights.

The new dashboard will be added to the list in the Navigation pane directly below the dashboard that you duplicated.

HOW TO DUPLICATE A SINGLE DASHBOARD

Step	Action
1	Right-click on the dashboard's name in the Navigation pane.
2	Select **Duplicate**.

HOW TO DUPLICATE MULTIPLE DASHBOARDS

Step	Action
1	Click on the tick at the top of the Navigation pane.◆ 
2	Click on the dashboards you want to duplicate to select them. ➲ 
3	Click on the **Duplicate** button. ➲ 
4	Click on the tick at the top of the Navigation pane.◆ 

◆ *The tick box is a toggle switch. Click to display and hide as necessary.*

Deleting a dashboard

Be careful! Deleted dashboards cannot be recovered.

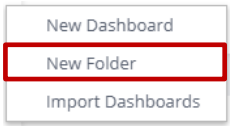
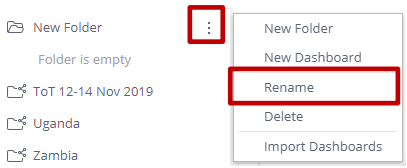
HOW TO DELETE A DASHBOARD

Step	Action
1	Click on the three-dot vertical ellipsis in the top right corner of the dashboard to be deleted to open a dropdown menu
2	Select **Delete Dashboard**.

Organizing dashboards

HOW TO CREATE A FOLDER

You can organize your dashboards into folders and sub-folders, much the same way as you do in Windows for your documents.

Step	Action	
1	**If …**	**Then …**
	If you are creating a completely new folder	Click on the + sign in the Navigation pane.
	If you are creating a sub-folder in an existing folder	Click on an existing folder in the Navigation pane.
2	Select **New Folder**. ■ A 'New Folder' will be added either at the bottom of dashboard or under the existing folder.	
3	Click on the folder you have just created and then on the three-dot vertical ellipsis to open a dropdown menu.	
4	Select **Rename** from the dropdown menu and type a new name for your folder.	

PART 7: WORKING WITH WIDGETS

In this section:

See also 'How to rearrange dashboard widgets' on page 32.

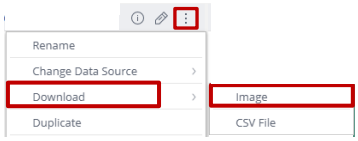
Downloading widgets in different formats

Widgets can be downloaded in a number of formats: images—useful for including reports, emails, a presentation or to add to the Intranet—and pivot tables to Excel or PDF.

You can download from either dashboard mode or edit widget mode (within the widget); each method is described below.

HOW TO DOWNLOAD A WIDGET AS AN IMAGE

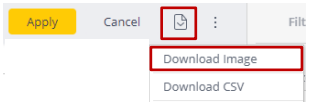
DOWNLOADING A WIDGET AS AN IMAGE FROM DASHBOARD MODE

Step	Action
1	Click on the three-dot vertical ellipsis in the widget's menu.
2	Click on the three-dot vertical ellipsis on the right of the dashboard name. 
3	Select **Download** and then **Image**. ⓘ Microsoft Edge, Google Chrome and Firefox will normally save downloaded files in the Downloads folder on your computer.
4	(Optional, recommended) Open the folder containing the file you have just downloaded and save the file to a named folder for safe keeping.

If you do not find the downloaded file in the Downloads folder, open your browser and press Ctrl+J *on your keyboard to open the download history tab.*

DOWNLOADING A WIDGET AS AN IMAGE FROM WITHIN THE WIDGET

◆ If you do not find the downloaded file in the Downloads folder, open your browser and press Ctrl+J on your keyboard to open the download history tab.

Step	Action
1	Click on the **Download** icon. 
2	Select **Download Image**. ➲ ⓘ Microsoft Edge, Google Chrome and Firefox will normally save downloaded files in the Downloads folder on your computer.◆
3	(Optional, recommended) Open the folder containing the file you have just downloaded and save the file to a named folder for safe keeping.

HOW TO DOWNLOAD PIVOT TABLES

DOWNLOADING A PIVOT TABLE TO EXCEL

When you download your pivot table to Excel, the data displayed in your widget will be the data that is downloaded. Up to 1.5 million cells can be downloaded.

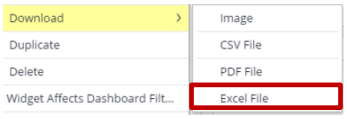
Your pivot table's structure and its values are maintained for the download.

This is not the case when pivot tables are exported to CSV.

You can download from either dashboard mode or edit widget mode (within the widget); each method is described below.

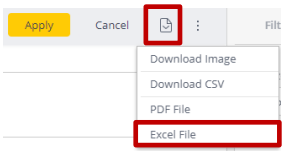
DOWNLOADING A PIVOT TABLE TO EXCEL FROM DASHBOARD MODE

◆ If you do not find the downloaded file in the Downloads folder, open your browser and press Ctrl+J on your keyboard to open the download history tab.

Step	Action
1	Click on the dashboard from the dashboard list.
2	Click on the widget's menu in the dashboard display.
3	Select **Download** and then **Excel File** from the dropdown list. ➲  ⓘ Microsoft Edge, Google Chrome and Firefox will normally save downloaded files in the Downloads folder on your computer.◆
4	(Optional, recommended) Open the folder containing the file you have just downloaded and save the file to a named folder for safe keeping.

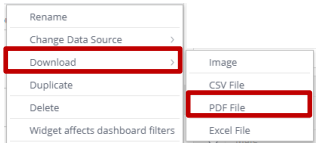
If you do not find the downloaded file in the Downloads folder, open your browser and press Ctrl+J on your keyboard to open the download history tab.

DOWNLOADING A PIVOT TABLE TO EXCEL FROM EDIT WIDGET MODE

Step	Action
1	Click on the **Download** icon. 
2	Select **Excel File** from the dropdown list. ⓘ Microsoft Edge, Google Chrome and Firefox will normally save downloaded files in the Downloads folder on your computer.◆
3	(Optional, recommended) Open the folder containing the file you have just downloaded and save the file to a named folder for safe keeping.

DOWNLOADING A PIVOT TABLE TO PDF FROM DASHBOARD MODE

When you download your pivot table to PDF, the entire table—up to 1,000 rows—will be downloaded. Excess rows will be removed automatically.

Step	Action
1	Click on the dashboard from the dashboard list.
2	Click on the widget's menu in the dashboard display. 
3	Select **Download.** 
4	Select **PDF File** to open the PDF Reports Settings page. ➲
5	Choose the **Paper Size** and **Orientation** for your PDF. **Header:** Select the information you would like to appear in the page header from the left menu. ■ You may edit the header—also its size and alignment—in the Preview area. **Footer:** Select **Page Number** to add the page number in the footer of the PDF.

(Step/Action continued on next page)

(Step/Action continued from previous page)

◆ If you do not find the downloaded file in the Downloads folder, open your browser and press Ctrl+J on your keyboard to open the download history tab.

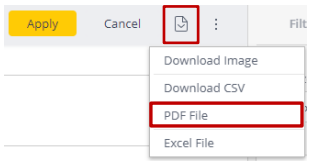
Step	Action
6	Click on **Download** to download the Excel widget to PDF. ⓘ Microsoft Edge, Google Chrome and Firefox will normally save downloaded files in the Downloads folder on your computer.◆
7	(Optional, recommended) Open the folder containing the file you have just downloaded and save the file to a named folder for safe keeping.

DOWNLOADING A PIVOT TABLE TO PDF FROM EDIT WIDGET MODE

When you download your pivot table to PDF, the entire table—up to 1,000 rows—will be downloaded. Excess rows will be removed automatically.

◆ If you do not find the downloaded file in the Downloads folder, open your browser and press Ctrl+J on your keyboard to open the download history tab.

Step	Action
1	Click on the **Download** icon.
2	Click on **PDF File**. ⓘ Microsoft Edge, Google Chrome and Firefox will normally save downloaded files in the Downloads folder on your computer.◆
3	Optional (recommended) Open the folder containing the file you have just downloaded and save the file to a named folder for safe keeping.



Using the Widget Designer

You may wish to watch a short three-minute video to familiarize yourself with using the Widget Designer for the first time: https://documentation.sisense.com/docs/widget-designer

HOW TO CHANGE A WIDGET'S VISUALIZATION

Edit rights are determined by the dashboard owner.

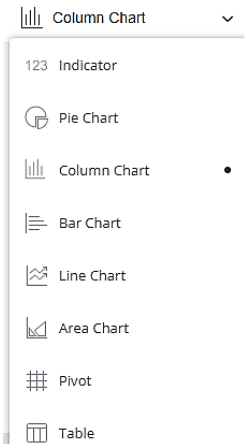
An instant change to the visualization of a chart widget—switching between pie charts, column charts, bar charts, area charts, etc.—can be made using the Widget Designer.

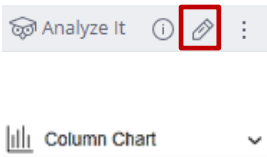
You can also save new visualizations to have two or more versions on your dashboard.

These actions are dependent on you having sufficient edit rights.

Only the visualization is changed, all values and definitions stay with the widget.

Here's how:



Step	Action
1	Click the **Pencil (Edit)** icon in the top right corner of the widget.  ■ The current visualization will be shown at the top of the list.
2	Click on the down arrow alongside the current visualization to select a new visualization. ■ You will be presented with a preview of the new chart. Check the preview carefully. Depending on the values used for grouping the data in the original visualization, the new visualisation may not work for you.
3	Click on **Apply** if you wish to keep the new visualization.

Would you like to keep both visualizations? If so, you can copy the widget and change the visualization.

See 'How to copy a widget' on page 52.

Widget titles and design options

HOW TO ADD A NEW WIDGET TITLE

SET A TITLE

Step	Action
1	Click the **Pencil (Edit)** icon in the top right corner of the widget to open the Widget Designer.
2	Click on **Set a Title** and type in a new title for the widget.

MORE WIDGET DESIGN OPTIONS

ACCESSING MORE OPTIONS

Options available will depend on the type of widget selected.

All widgets include:

- Rename
- Change Data Source
- Download
- Duplicate
- Delete
- Distribute equally in this row
- Analyze Widget JAQL

Step	Action
1	Click the **Pencil (Edit)** icon in the top right corner of the widget to open the Widget Designer.
2	Click on **Accessing More Options** to access a menu of additional options for the widget.

Copying widgets

HOW TO COPY A WIDGET

You can create a copy of a widget within the same dashboard or another dashboard in your list. This is useful for saving the original widget in the dashboard before making changes. The new widget is separate from the original so no changes to the new widget affect the original widget.

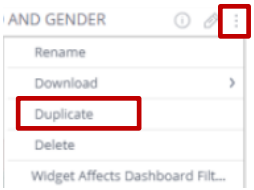
You may wish to watch a short one-minute video to familiarize yourself with the process before you start copying widgets for the first time: https://documentation.sisense.com/docs/managing-widgets

COPYING A WIDGET WITHIN THE SAME DASHBOARD

> ◆ *Remember!*
> *If you cannot perform any of the actions described, this will be due to restrictions set by the dashboard owner.*
>
> *See 'Restrictions you may face' on page 23 if you need to find the details of the dashboard owner.*

You will need to be in dashboard view to copy a widget.

Step	Action
1	Click on the three-dot vertical ellipsis in the top right corner of your widget to open a dropdown menu. ➲
2	Select **Duplicate**.◆ ➲



SAVING A COPY OF A WIDGET

You will need to be in dashboard view to save a copy of a widget.

Step	Action
1	Click on the three-dot vertical ellipsis in the top right corner of your widget to open a dropdown menu.
2	Select **Save a Copy**.

COPYING A WIDGET TO ANOTHER DASHBOARD

> ◆ *If the target dashboard data source is from another Elasticube, the dashboard filters will not affect the widget you are copying.*

You will need to be in dashboard view to copy a widget to another dashboard.

Step	Action
1	Select the header of the widget to be copied to another dashboard.
2	Drag the selected widget to the target dashboard.◆

Deleting widgets

HOW TO DELETE A WIDGET

You can only delete widgets that you own.

Step	Action
1	Click on the three-dot vertical ellipsis in the top right corner of your widget to open a dropdown menu.
2	Select **Delete**.
3	Click on the green tick to confirm deletion. ➲

-- End of user guide content --

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