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Part 1

Introduction to SAS BI Dashboard

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Chapter 1
About SAS BI Dashboard

What is SAS BI Dashboard?

SAS BI Dashboard enables users to use dashboards to monitor key performance indicators that convey how well an organization is performing. Dashboards can include graphics, text, colors, and hyperlinks. Dashboards are created, maintained, and viewed through an easy-to-use Web-based interface. All content is displayed in a role-based, secure, customizable, and extensible environment.

SAS BI Dashboard Users

SAS BI Dashboard serves the following users:

- The dashboard designers that are technical users of SAS BI Dashboard.
- The business users that use the views created by the designers in SAS BI Dashboard.

Note: SAS BI Dashboard also requires administrators to set up and maintain the product. See the SAS BI Dashboard System Administration Guide.
Benefits of Using SAS BI Dashboard

Benefits for Dashboard Designers

SAS BI Dashboard provides the following benefits to dashboard designers:

- Dashboards are easy to design and build. Drag-and-drop capabilities make the process quick also.
- Dashboards are easy to customize. The following features are simple to customize by using the dashboard designer:
  - interactions
  - alerts
  - zoom
  - links
- Dashboards can use a wide variety of data sources:
  - SAS Information Maps
  - SAS Stored Processes
  - SQL query
  - tables
- Indicators are simple to align and resize.
- Dashboards can be designed to make it easier for business users to visualize and interpret data.

Benefits for Business Users

SAS BI Dashboard provides the following benefits to business users:

- Collaboration and information sharing are easy. The commenting feature for indicators enables quick communication.
- The alerting feature makes it easy for business users to monitor key performance areas and to be proactively notified of conditions that require follow-up.
- Frequently viewed indicators and dashboards are easy to retrieve by using the favorites feature.
- Details can be viewed up close by using the zoom feature. Zooming maximizes screen space by enlarging indicators.
- Data can be viewed in multiple ways without rebuilding the indicator or dashboard. The interactions and prompts features provide this support.
- Tasks can be completed with a minimum number of clicks. Prompt selections in dashboards now provide additional information that enables users to decide what item to click in the user interface before they actually click. This information includes KPI gauges and range colors that appear for each selection.
SAS BI Dashboard Features

**SAS BI Dashboard Designer**

The SAS BI Dashboard designer, version 4.3 or later, provides a new, interactive, and intuitive interface. Now you can drag and drop objects onto the dashboard that you are designing. You can also resize indicators by using your mouse. New features assist you in laying out dashboard content precisely. The designer now provides a real-time, what-you-see-is-what-you-get view of the dashboard while you are designing it. The dashboard designer also now provides many more indicator types to use in a dashboard, as well as new graph styles to enhance the appearance of indicators.

*Figure 1.1 SAS BI Dashboard Designer*

By using the dashboard designer, designers can create and design dashboards that consist of one or more indicators. For information about designing dashboards, see “Part 3. Designing Dashboards.”
SAS BI Dashboard Viewer

By creating dashboards, designers provide data to their business users. Business users can view these dashboards in the SAS BI Dashboard viewer.

The SAS BI Dashboard viewer, version 4.3 or later, provides new features for bookmarking favorite dashboards and indicators, sharing comments with other business users about indicators in a dashboard, creating personalized alerts, and viewing data in a more interactive way.

It is easy to move between the dashboard designer and the new dashboard viewer. Designers can create a new dashboard, effortlessly view it in the dashboard viewer, and then quickly return to the dashboard designer again. Or, designers can use the Preview feature and view the dashboard and most of its features without leaving the dashboard designer at all.

Figure 1.2  SAS BI Dashboard Viewer

For information about viewing dashboards, see “Part 2. Viewing Dashboards.”

SAS BI Dashboard Portlet

SAS BI Dashboard continues to provide a portlet for viewing dashboards in the SAS Information Delivery Portal.
For information about viewing dashboards, see “Part 2. Viewing Dashboards.”

**Accessing Help and Documentation for SAS BI Dashboard**

SAS BI Dashboard provides the following types of documentation:


This document, available as a PDF file, provides detailed information about the concepts and tasks that are related to using SAS BI Dashboard. To access this document, go to the SAS BI Dashboard Documentation Web page at [http://support.sas.com/documentation/ondlinedoc/bidashboard/index.html](http://support.sas.com/documentation/ondlinedoc/bidashboard/index.html).

Embedded help

Help pop-ups and tooltips provide brief descriptions of various tasks and fields to help you use SAS BI Dashboard application effectively.
To access Help pop-ups for more information about a product feature, click when it appears next to a field or area in the user interface. You can also place the mouse pointer over an element in the user interface to view the associated tooltip for more information.

**Help menu**

Help menus provide information about the product and a link to the SAS BI Dashboard product Web page. This page provides product documentation and other support information. The menu also provides links to SAS customer support and the SAS home page.


---

**Supported Web Browsers**

SAS BI Dashboard is supported by the following Web browsers:

- Microsoft Internet Explorer
- Mozilla Firefox
- Google Chrome

For supported versions of browsers for your operating system and release of SAS, see [Third-Party Software Requirements for Use with SAS® Software and Applications](http://support.sas.com/documentation/)

---

**Adobe Flash Requirement**

SAS BI Dashboard requires that the Adobe Flash plug-in be installed in your Web browser.

For supported versions of browser plug-ins for your operating system and release of SAS, see [Third-Party Software Requirements for Use with SAS® Software and Applications](http://support.sas.com/documentation/)

---

**Accessibility Features**

For information about the accessibility of this product, see [Accessibility Features of SAS BI Dashboard 4.4](http://support.sas.com/documentation/).
Chapter 2
Dashboard Features and How to Use Them

Why Use a Dashboard?

Dashboards provide a way to view data. Users can quickly view critical information in a compact, easy to interpret interface. Dashboards can display key performance indicators in one place to help users monitor information throughout an enterprise. By using the new dashboard designer and dashboard viewer, you can create a single dashboard that contains multiple indicators instead of creating a portal page with multiple dashboard portlets. Coordinating the look and feel of your dashboard and indicators is easier than ever.

Dashboard Design Ideas

SAS BI Dashboard provides many new types of indicators as well as new interactive features. Depending on your design choices, a dashboard can now provide application-like services to its users. With version 4.3 and later, users not only view dashboards, but interact with and use information accessed from dashboards in many ways.

You can build links to other information in your dashboards. The following design ideas use links from static labels and images in a dashboard:

- create a menu or table of contents to list available dashboards, reports, or Web pages

- create tabs along one side of the dashboard to mimic the look and feel of a tabbed portfolio

- link to more detailed SAS Web Report Studio or SAS Stored Process reports

For examples showing how to create links, see “Linking to Other Information by Adding Static Content” on page 98.
You can also set up interactions between indicators on a dashboard that help analyze information. With these features, dashboards are no longer about viewing information, but about interacting with provided information and data.

- By using an interaction between a dynamic prompt and a chart, you can mimic a menu that enables users to select different categories of data to view.

- By using an interaction between a bar chart and a spark table indicator, users can explore data in the dashboard. When the user select a car manufacturer in the bar chart, the manufacturer data is highlighted in the spark table indicator.

For more information, see “Adding Interactions between Indicators” on page 104.
Part 2

Viewing Dashboards

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Chapter 3
SAS BI Dashboard Viewers

Viewer Support for SAS BI Dashboard

SAS BI Dashboard provides dashboard viewer support in the following ways:
- the SAS BI Dashboard viewer, part of the SAS BI Dashboard Web application
- a SAS BI Dashboard portlet, defined in the SAS Information Delivery Portal

Viewer Feature Comparison

The following table details the feature support in each viewer.

Note: An X indicates support.

<table>
<thead>
<tr>
<th>Features</th>
<th>Dashboard Viewers</th>
<th>Portlet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing dashboards or indicators</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Default dashboard setting</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Navigation among dashboards or indicators</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Client caching to reduce response times and resource demands</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Manual refresh</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

1 The Information Delivery Portal provides a similar feature for the portlet. For more information, see “Set the Default Dashboard View Setting” on page 38.1
## Dashboard Viewers

<table>
<thead>
<tr>
<th>Features</th>
<th>Viewer</th>
<th>Portlet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic refresh</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Zoom</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Print</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Personal indicator alerts</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Favorites</td>
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<td></td>
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Overview

The dashboard viewer provides the same functionality as the SAS BI Dashboard portlet, as well as enabling you to perform the following tasks:

- set dashboards and indicators as favorites
- create personalized indicator alerts
- make comments about indicators
- start the SAS BI Dashboard designer
- view dashboards and indicators in a larger display area

Access the SAS BI Dashboard Viewer

You can access the SAS BI Dashboard viewer in the following ways:

- by typing the following Web address in your Web browser: \texttt{http://server:port/SASBIDashboard}.

  \textit{server:port} is the Web address of your SAS BI Dashboard server.

  \textit{Note:} The port and the default root directory for SAS BI Dashboard are set during the installation of the product. The Web address used by your organization might vary.

- by clicking \includegraphics[width=1cm]{dashboard_icon.png} in the SAS BI Dashboard portlet toolbar.

The SAS BI Dashboard Viewer Interface

\textit{Your First Look at the SAS BI Dashboard Viewer Interface}

The following figure shows how the SAS BI Dashboard viewer appears in the following scenarios:

- when you use the viewer for the first time.
- when you have set the interface to not display the previously open dashboard or indicator. For more information, see “Clear the Default Dashboard View Setting” on page 20.
The SAS BI Dashboard Viewer Interface

Figure 4.1 SAS BI Dashboard Viewer Initial Interface

1 Banner.
2 Menu. For more information, see “The Menu” on page 18.
3 Workspace. The dashboard appears in the workspace.

The Interface Displaying a Dashboard

After you choose a dashboard or indicator for viewing, the SAS BI Dashboard viewer interface provides additional features.

Figure 4.2 SAS BI Dashboard Viewer Interface with a Dashboard Displayed

1 Banner.
2 Menu. For more information, see “The Menu” on page 18.
3 Navigation buttons. For more information, see “Navigate among Multiple Dashboards or Indicators” on page 20.

4 Dashboard title bar. If you view a dashboard, its title appears here. If you open an indicator, the title bar displays the indicator title. The title bar also provides the following icons:
   • Print. For more information, see “Print a Dashboard or Indicator” on page 21.
   • Refresh. For more information, see “Manually Refresh the Viewer Contents” on page 20.

5 Indicators. For more information, see “The Indicator” on page 18.

**The Menu**

The menu provides tasks and features to use while viewing a dashboard.

**File**

- For **Open**, see “Open a Dashboard or Indicator” on page 19.
- For **Print**, see “Print a Dashboard or Indicator” on page 21.
- For **Manage Dashboards**, see “Manage and Design Dashboards” on page 29.

**View**

Provides ways to control how you view a dashboard.

- For **Refresh Dashboard**, see “Manually Refresh the Viewer Contents” on page 20.
- For **Go To**, see “Navigate among Multiple Dashboards or Indicators” on page 20.
- For **Open the Previously Viewed Dashboard by Default**, see “Clear the Default Dashboard View Setting” on page 20.
- For **Set Automatic Refresh Interval**, see “Set the Automatic Refresh Interval” on page 21.

**Favorites**

For more information, see “Working with Favorites” on page 28.

**Help**

Provides information about the product and a link to the SAS BI Dashboard product Web page. This page provides product documentation and other support information. The menu also provides links to SAS customer support and the SAS home page.

**Manage Dashboards**

For more information, see “Manage and Design Dashboards” on page 29.

**The Indicator**

The indicator provides the following features:
Open a Dashboard or Indicator

To open a dashboard or indicator, complete the following steps:

1. Click File ᅑ Open. The Select a Dashboard or Indicator window appears and displays only dashboards and indicators.

2. By using the Show list, you can filter the list to show only dashboards or indicators.
   - To view only dashboards in the list, click Dashboard. Dashboard files use the DCX file extension.
   - To view only indicators in the list, click Indicator. Indicator files use the IDX file extension.

3. Navigate to the dashboard or indicator that you want to open, and click that file. The indicator or dashboard appears in the workspace.
Clear the Default Dashboard View Setting

By default, the SAS BI Dashboard viewer displays the last dashboard or indicator that was displayed when the SAS BI Dashboard viewer was closed. However, there might be times when you do not want to display this dashboard or indicator.

To display no dashboard or indicator when you first start the SAS BI Dashboard viewer, click View ⇒ Open the Previously Viewed Dashboard by Default to clear the default view setting.

Navigate among Multiple Dashboards or Indicators

After you open a second dashboard or indicator, the navigation controls appear below the menu bar.

Dashboard navigation is also available when you click View ⇒ Go To.

The navigation controls enable you to move backward and forward through the dashboards and indicators that you have opened. The down arrow displays a navigation history list. The list is not a recently visited list. Instead, the navigation history list records your flow of navigation. If you back track from an item, that item is no longer in the navigation history. For example, suppose that you view three dashboards in the following order: A, B, and C. Then you click the back arrow to view dashboard B again. Next, you open dashboard D. Dashboard C is no longer in the navigation history list. The navigation arrows cannot display dashboard C either. Dashboard C is no longer in the recorded navigation flow because you back-tracked from that dashboard.

Note: The navigation history list does not persist if you log off from the dashboard designer or if you leave the dashboard designer to use the dashboard portlet and then return to the dashboard designer. For links that persist, use the Favorites feature. For more information, see “Working with Favorites” on page 28.

Manually Refresh the Viewer Contents

To manually refresh the contents of the SAS BI Dashboard viewer, click in the dashboard title bar.
Set the Automatic Refresh Interval

To automatically refresh the contents of the SAS BI Dashboard viewer, complete the following steps:

1. Click View ➜ Set Automatic Refresh Interval. The Refresh Interval window appears.

2. Click Automatic refresh, and then specify the time interval in the Interval field.

3. Click OK.

Note: The automatic refresh feature updates only the underlying data that is used by the indicators on the dashboard. If you change the dashboard by adding, removing, or modifying indicators, these changes are not displayed in the viewer after an automatic refresh. To ensure that dashboard changes are reflected in the viewer, you must manually refresh the viewer. For more information about performing a manual refresh, see “Manually Refresh the Viewer Contents” on page 20.

Zoom In on an Indicator

If an indicator is enabled for zooming, the indicator title bar displays the Zoom + icon.

When an indicator is not zoomed, some of the indicator content might not appear or might be difficult to read. When you click , the indicator enlarges and the content appears as designed. However, other indicators in the dashboard might be obscured by the enlarged indicator. Click to reduce the indicator to its original size.

Note: If your mouse includes a wheel, you can use the mouse wheel to zoom in and out of indicators.

Print a Dashboard or Indicator

You can print an entire dashboard or only an indicator.
To print a dashboard, click in the dashboard title bar. The Print window appears.

To print an indicator, in the indicator title bar, click and then Print Indicator. The Print window appears.

---

## Setting Personal Indicator Alerts

### Overview

A personal indicator alert is an alert that is sent only to you. This is different from an indicator alert, which is sent to a list of one or more alert subscribers. Indicator alerts are defined and attached to an indicator by a dashboard designer. A personal alert is in addition to any indicator alerts.

You can choose to receive a notification of an alert in the following ways:

- in an Alert portlet in the SAS Information Delivery Portal
- by e-mail

Note:

- A dashboard designer must enable personal indicator alerts for an indicator before a business user can define a personal indicator alert on the indicator.
- The alerts shown in the Edit Indicator Alerts window are only your personal indicator alerts. Indicator alerts created by a dashboard designer are not shown.

### Understanding Alerts

#### The Alert Definition

When you define an alert, you specify the circumstance that causes that alert to occur. This circumstance is the trigger. To define the trigger, you must make the following selections:

- the range to evaluate
- the interval in the range in which the data point values must occur
- the percentage of data points that must occur in that interval

#### How Alerts Are Triggered

An alert is triggered in the following way:

1. SAS BI Dashboard periodically checks for a change in the indicator data, updates to the indicator alert definition, or both. By default, this check happens every 3 minutes. A SAS BI Dashboard administrator can change this setting.

2. If an update is detected and the percentage of data points in the trigger interval has changed, the alert criteria are evaluated.

3. If the criteria are met, an alert is triggered and a notification is sent to the subscriber.

Note: If the alert criteria are met at the time that you create the alert, the alert is triggered immediately. Afterwards, the alert is triggered only when the data changes and the alert criteria are met.
**Alert Criteria and Data Aggregation**

If an indicator can aggregate data, it is important to understand that the percentage that is used by alerting is calculated by evaluating the underlying indicator data to determine the number of data points in the interval. The software does not evaluate the aggregated results presented in the graph view. For example, if a bar chart has three bars, each bar can represent an average of multiple data points. A given bar might fall within the alert interval. However, it is possible that none of the individual data points associated with that bar fall in the same interval. In this case, the three bars reflect the aggregated data, not the data points used in the alert calculation.

The following indicators support alerts and can aggregate data:

- bar chart with bullet
- bar chart with reference lines
- interactive summary and bar chart
- interactive summary and targeted bar chart
- targeted bar chart
- tile chart
- waterfall chart

**Changes That Can Affect Alert Calculations**

In addition to underlying data changes, updates to any of the following indicator components can affect the interval percentage calculation and cause the alert to be reevaluated:

- If the indicator source data is changed, the data available for evaluation can change. For example, if you update the filters defined in an information map, the new filter definition can cause a change in the number of data points that are evaluated.

- If the indicator data definition is changed, the data available for evaluation can change. The following changes are examples of what can cause the data that is evaluated to change:
  - updating the indicator data definition to modify an SQL query
  - changing the selected items for an information map
  - updating the **Group by** criteria for a table

- If the range is changed, the calculated percentage can change. For example, if you change the upper limit of the range from 100 to 200, the percentage of data points that exist in the range and in its intervals can change.

- If the indicator definition is changed, the data values that are evaluated can change. For example, if you change the **Y-axis value** setting from *Height* to *Weight*, the data that is evaluated is changed.

**Create an Alert**

*Note:* Due to customization by the dashboard designer, this feature might not be available.

To create a personal indicator alert, complete the following steps:

1. In the indicator title bar, click 📉 and then click **Personalize Alerts**. The Create Indicator Alerts window appears.
Note:

- If Personalize Alerts is not available, the dashboard designer has not enabled personalization.
- If the Options menu is not available, the indicator is not displayed in a tile.
- Alerts can be used only with indicators that use a range. For information, see “Indicator Types That Support Ranges” on page 67.

Contact the dashboard designer for assistance.

2. In the Alert name field, type the name of the alert.

3. From the Gauge definition list, select the range to evaluate.

   Note: Most indicators use only one range and this setting defaults to that range. However, the following indicators use two ranges. Therefore, you must select the range to evaluate:
   - interactive summary and scatter plot
   - range map

4. From the Trigger interval list, select the interval in which the value must occur to trigger the alert.

5. Specify how many values (that is, data points or gauges) must be in the selected interval to trigger the alert:
   - Any gauge is in the interval
• % of gauges are in the interval

Note: If you select this setting, type a value in the field next to the check box.

6. Select the delivery method for the alert: Alerts portlet or E-mail subscribers.

Note:

• You can select both methods.

• **Alerts portlet** presumes that the recipient has an Alerts portlet defined in the SAS Information Delivery Portal. If there is not an Alerts portlet, the alerts remain saved on the server. If a user adds an Alerts portlet to the portal, all previous alerts appear in the Alerts portlet.

• The business user's e-mail address must be available from SAS metadata. For more information, see the *SAS Management Console: Guide to Users and Permissions*.

7. (Optional) If you selected **E-mail subscribers**, complete the following steps:

a. From the **E-mail template** list, select the template to use for e-mail notifications of alerts.

Note: The items available in this list are controlled by the dashboard designer.

<table>
<thead>
<tr>
<th>Template Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link only</td>
<td>The e-mail includes a link that opens the affected indicator in the SAS BI Dashboard viewer.</td>
</tr>
<tr>
<td></td>
<td><em>Note:</em> All indicator types support this template.</td>
</tr>
</tbody>
</table>

| Default       | The e-mail includes an image of the affected indicator and a link that opens the indicator in the SAS BI Dashboard viewer. |
|---------------|*Note:* The following indicator types support this template: |
|               | • bar chart with reference lines |
|               | • KPI |
|               | • line chart with reference lines |
|               | • range map |
|               | • scatter plot |
|               | • targeted bar chart |

b. In the **Subject** field, type the subject. Type any additional message to include in the e-mail in the **Add a message to the e-mail** field.

8. Click **Save Alert**. The alert appears in the **Alerts** table.

9. If you want to create another alert, click **New Alert**. To exit the Create Indicator Alerts window, click **OK**.

**TIP** For personal alerts, the alert is saved to the server when you exit the window.

Note: If the alert criteria are met at the time that you create the alert, the alert is triggered immediately. Afterwards, the alert is triggered only when the data changes and the alert criteria are met.
**Edit an Alert**

To edit an alert, complete the following steps:

1. Click and then click **Personalize Alerts**. The Manage Indicator Alerts window appears.
   
   *Note:* When the Manage Indicator Alerts window appears, the first alert in the Alerts table is automatically highlighted and its properties appear in the left side of the window.

2. In the Alerts table, select an alert. The properties of the alert appear on the left side of the window.

3. Edit the properties as described in “Create an Alert” on page 23.

4. Click **Save Alert**.

5. Click **OK** to exit the Manage Indicator Alerts window.

   *Tip* For personal alerts, the alert is saved to the server when you exit the window.

   *Note:* If the edit causes a change in the calculated interval percentage since the percentage was last evaluated and the alert criteria are still met, the alert is triggered.

**Delete an Alert**

To delete an alert, complete the following steps:

1. In the Manage Indicator Alerts window, select an alert in the Alerts table.

2. Click .

3. Click **OK** to exit the Manage Indicator Alerts window. The delete is saved to the server when you exit the window.

---

**Creating Comments and Replying**

**Overview**

You and other users that have access to an indicator can make comments about that indicator. Using comments, you can communicate among your coworkers and improve productivity. An indicator can have multiple topics of conversation and each topic can be an extended conversation of comments and replies. If a conversation is extensive, you can sort, filter, and search the comments.

**View and Create Comments**

If an indicator already has comments, ✉️ appears on the indicator title bar. To make a new comment, complete the following steps:

1. In an indicator title bar, click ✉️, and then click **Manage Comments**. The Comments window appears.
If there are existing comments about this element, the comments appear in this window.

2. Click **New Topic** to make a comment about a new topic.

3. In the New Topic window, type a topic name and a comment.

4. (Optional) Click **Attachment** to attach a file to the comment. Select one or more files to attach and click **Open**.
   
   **Note:** To delete the attachment from the comment, click ✗ in the New Topic window. After you save the comment, you can no longer delete the attachment.

5. Click **Save** to save and post your comment. When you post a comment, it is added to a topic thread of comments about that indicator. After you post a comment, other users can reply. Their comments are also added to the topic thread of comments.

---

**Reply to a Comment**

If an indicator has comments, 📣 appears on the indicator title bar. To reply to a comment, complete the following steps:

1. In an indicator title bar, click 📣. The Comments window appears.

2. Expand the topic thread of comments.

3. Locate the comment that you want to reply to and click **Reply**.

4. In the response window, type a comment.

5. (Optional) Click **Attachment** to attach a file to the comment. Select one or more files to attach and click **Open**.
Note: To delete the attachment from the comment, click X in the New Topic window.

6. Click OK to save and post your reply. The comment is added to the thread of comments.

**Edit an Existing Comment**

Business users cannot edit existing comments. Only users in the Comments Administrator role can edit comments. For more information, see the *SAS 9.3 Middle-Tier Administration Guide* and the *SAS 9.3 Web Application Administration Guide*.

**Delete a Comment**

Business users cannot delete comments. Only users in the Comments Administrator role can delete comments. For more information, see the *SAS 9.3 Middle-Tier Administration Guide* and the *SAS 9.3 Web Application Administration Guide*.

**Sort Comments**

To sort comments, in the Comments window, click Actions ➔ Sort and Filter and select the way that you want to sort the comments. The comment list is sorted.

**Search through Comments**

To search comments, complete the following steps:

1. In the Comments window, type one or more characters in the Search field.
2. Click 🔍. Any comments that include the search string appear in a results list.
3. To view an entire comment, click Show This Topic.
4. To view the results list again, click Back to Search Results.
5. To view the Comments window again, click Return to Comments.

**Exit Comments**

To exit the Comments window, click X in the upper right corner of the window.

---

**Working with Favorites**

**Overview**

To easily bookmark and return to a dashboard or an indicator, you can add it to your favorites.
Add a Dashboard to Your Favorites

To add a dashboard to your favorites, click Favorites ⇒ Add Dashboard to Favorites. This dashboard now appears in the Favorites menu.

Add a Dashboard with Parameters to Your Favorites

As of the second maintenance release of SAS BI Dashboard 4.31, when you save a dashboard as a favorite, you can choose to save the dashboard with its currently selected parameters. If you view a sales chart, for example, you might select a specific year and geographic location to tailor your data view. You can save the dashboard with the selected year and geographic settings.

To add a dashboard with parameters to your favorites, click Favorites ⇒ Add Dashboard to Favorites (with parameters). This dashboard now appears in the Favorites menu. The parameters saved with the dashboard appear in parentheses after the dashboard name.

Add an Indicator to Your Favorites

To add an indicator to your favorites, click Favorites ⇒ Add Indicator to Favorites ⇒ <Name of indicator>. This indicator now appears in the Favorites menu.

Note: You can also add an indicator to your favorites by clicking and then Add to Favorites.

Select a Favorite

To select a favorite, click Favorites ⇒ <Name of favorite>. The selected favorite appears in the viewer. If you already have a dashboard or indicator displayed in the viewer, the favorite appears over that content.

Organize Favorites

To organize your favorites, click Favorites ⇒ Manage Favorites. The Manage Favorites window appears. You can organize your favorites in the following ways:

• To create a folder in your favorites, click , and then name the folder.

• To move a favorite or folder, drag the item.

  Note: To drag an item into a folder, first expand the folder, and then drag the item into the folder.

• To rename a favorite or folder, click the item's name, and then type the name.

• To delete a favorite or folder, click the item's name, and then click .

Manage and Design Dashboards

If you are a member of the SAS BI Dashboard Administrator group, you can design and modify dashboards as well as view them. If you are a member of this group, Manage
Dashboards appears on the toolbar. To open the currently displayed dashboard in the SAS BI Dashboard designer, click Manage Dashboards.

For more information, see Chapter 6, “The SAS BI Dashboard Designer,” on page 43.
Chapter 5
Dashboard Portlet

Setting Up a SAS BI Dashboard Portlet

Overview

The SAS BI Dashboard portlet is supported by the following portals:

- SAS Information Delivery Portal
- WebSphere Portal

Before you can access the SAS BI Dashboard portlet, you must log on to the SAS Information Delivery Portal and create a portal page. Then you can add a SAS BI Dashboard portlet in which to view a dashboard.

After you set up a SAS BI Dashboard portlet, you can access the portlet by logging on to your portal.

Note:
Log On to the SAS Information Delivery Portal

To log on to the SAS Information Delivery Portal, complete the following steps:

1. Open your browser and type the Web address for the portal.
   
   Note: To obtain the Web address, contact your portal administrator.

   The Log On page appears.

2. Type your user name and password.

3. Click Log On. Your personal portal opens. Typically, most portal users see a page that contains a collection portlet (My Collection) and a bookmark portlet (Bookmarks).

Create a Page

To create a new portal page to contain the SAS BI Dashboard portlet, complete the following steps:

1. Click Customize ➔ Add Page. The Add Pages to Profile page appears.

2. On the Create tab, type descriptive information about the page:

   **Name**
   is a short name that appears in the page tab in the navigation bar.

   **Description**
   is a short description that appears along with the page title in search results.

   **Keywords**
   are single words that you or other users can use to search for this page. Use spaces to separate keywords from one another.

   **Note:** To ensure efficient searching, develop a list of standard keywords and use these keywords consistently.
Page rank

is a number that indicates the importance of this page as compared to other pages. The default value is 100.

This number determines the order in which pages are listed in the navigation bar. The pages are ordered by rank from lowest to highest. Pages that have equal rank are listed in the order in which they were created.

Location (group)

specifies the group with which to share the page. If you select a value in the Location (group) field, the Share type field appears.

Note: This list appears only if you are a group content administrator or a portal administrator.

**T I P**

- To share with everyone, select Public from the list. However, sharing a portal page among potentially hundreds or more users can impact performance. To share with a select group of users, consider using the Templates feature. For more information, see the SAS Information Delivery Portal documentation.

- This selection supports sharing with only one group at a time. To share with more than one group, you must have authorization manager capability in SAS Management Console. In SAS Management Console Permissions, expand Authorization Manager ⇒ By Type ⇒ PSPortletPage. Click your new portal page. In the View Properties dialog box, on the Authorization tab, add any users and groups to share. Click OK.

Share type

indicates how the page is shared with users.

Note: This list appears only if you are a group content administrator and have made a selection in the Location (group) list.

This list provides the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>Users in the group can find the page using Search. They can add the page if needed.</td>
</tr>
<tr>
<td>Default</td>
<td>Users in the group automatically see the page the next time they log on to the portal. Users can remove the page from the navigation bar if the page is not needed.</td>
</tr>
<tr>
<td>Persistent</td>
<td>Users in the group automatically see the page the next time they log on to the portal. However, users cannot remove the page from the navigation bar.</td>
</tr>
</tbody>
</table>

3. Click Add. A message appears, indicating that a new page was added.
4. Click Done. The new empty page appears in the portal.

Add a SAS BI Dashboard Portlet to the Page

A portal page can contain multiple portlets. Portlets can contain the following types of content:

- HTML
• Adobe Flash

Typically, multiple HTML-based portlets on a portal page do not impact performance. However, each Flash-based portlet must initialize Flash in the client. Therefore, multiple Flash-based portlets on a portal page can impact performance. To avoid a performance impact, do not add multiple portlets that contain Flash-based content to a single portal page. Starting with version 4.3, the SAS BI Dashboard portlet contains Flash-based content.

To add a SAS BI Dashboard portlet to a page, complete the following steps:

1. Navigate to the SAS Information Delivery Portal page to which you want to add a portlet.

2. Click Customize ⇒ Edit Page ⇒ Edit Page Content. The Edit Page Content page appears.

3. Click Add Portlets. The Add Portlets to Page page appears.

4. From the Portlet type list, select SAS BI Dashboard Portlet.

5. Type the name, description, and keywords, if any.

6. Click Add.

7. Click Done.

8. On the Edit Page Content page, click OK. The new portlet appears on the page displaying the portlet dashboard viewer.
Select a Dashboard

To select a dashboard for viewing, complete the following steps:

1. In the SAS BI Dashboard portlet title bar, click . The Edit Portlet page appears.

2. From the tree, select a dashboard. This list includes dashboards created by your organization. When you select a dashboard, its properties appear in the Basic properties table below the tree.

   Note: You can select only those dashboards that you are authorized to view.
3. (Optional) You can change the size of the portlet so it is easier to view on the portal page. Type the new dimensions in the **Dashboard width** and **Dashboard height** fields.

   **Note:** You cannot edit the **Portlet title** field.

4. (Optional) You can change how the dashboard is automatically refreshed. For more information, see “Change How a Dashboard Is Automatically Refreshed” on page 38.

5. Click **OK**. The dashboard appears in the portlet.

---

### The SAS BI Dashboard Portlet Interface

The SAS BI Dashboard portlet and its dashboard provides the following features.
Working in the SAS BI Dashboard Portlet

Change the Size of the Dashboard

You can change the size of the dashboard to make it easier to view in the portlet. To change the dashboard dimensions, complete the following steps:

1. In the SAS BI Dashboard portlet title bar, click the tools icon. The Edit Portlet page appears.
2. In the Dashboard width field, type the value for the width.
3. In the Dashboard height field, type the value for the height.
4. Click OK.
**Navigate between Linked Dashboards**

Navigation controls are available to enable you to move backward and forward through the dashboards that you have opened. The controls include forward and backward arrows for sequential navigation, as well as a history list that records the flow of navigation between dashboards.

In the dashboard portlet, navigation support is available only for dashboards that are linked. The navigation controls are not displayed when the portlet initially loads. However, when you activate a link from one dashboard to another in the portlet, the navigation controls are displayed and can then be used.

**Manually Refresh the Portlet Contents**

To manually refresh the contents of a SAS BI Dashboard portlet, click $\text{refresh}$ in the dashboard title bar.

**Change How a Dashboard Is Automatically Refreshed**

By default, the automatic refresh interval is set to 30 seconds. If this setting causes excessive flashing or slow response time, you might want to increase the interval or turn off automatic refresh.

To change the automatic refresh interval of the portlet contents, complete the following steps:

1. In the SAS BI Dashboard portlet title bar, click $\text{settings}$ The Edit Portlet page appears.
2. To turn off automatic refresh, next to Auto refresh interval, clear the Refresh every check box.
3. To change the interval, click Refresh every, and then type a value in the field.
4. Click OK.

*Note:* The automatic refresh feature updates only the underlying data that is used by the indicators on the dashboard. If you change the dashboard by adding, removing, or modifying indicators, these changes are not displayed in the portlet after an automatic refresh. To ensure that dashboard changes are reflected in the portlet, you must manually refresh the portlet. For more information about performing a manual refresh, see “Manually Refresh the Portlet Contents” on page 38.

**Set the Default Dashboard View Setting**

You can set the default dashboard to view in the portlet. To change the setting, complete the following steps:

1. In the SAS BI Dashboard portlet title bar, click $\text{settings}$ The Edit Portlet page appears.
2. In the Selected dashboard tree, select the dashboard that you want to view by default when you open this portal page. This tree includes dashboards created by your organization.
   
   *Note:* You can select only those dashboards that you are authorized to view.
3. Click OK.
**Zoom In on an Indicator**

If an indicator is enabled for zooming, the indicator title bar displays the Zoom + icon 🕹️.

When an indicator is not zoomed, some of the indicator content might not appear or might be difficult to read. When you click 🕹️, the indicator enlarges and the content appears as designed. However, other indicators in the dashboard might be obscured by the enlarged indicator. Click 🕹️ to reduce the indicator to its original size.

*Note:* If your mouse includes a wheel, you can use the mouse wheel to zoom in and out of indicators.

**Print a Dashboard or Indicator**

You can print an entire dashboard or only an indicator.

- To print a dashboard, click 📃 in the dashboard title bar. The Print window appears.
- To print an indicator, in the indicator title bar, click 📃 and then Print indicator. The Print window appears.

**Switch to View the Dashboard in the SAS BI Dashboard Viewer**

You can choose to view the dashboard in the SAS BI Dashboard viewer. Switching to the SAS BI Dashboard viewer enables you to use comments, favorites, and personal indicator alerts. The SAS BI Dashboard viewer can also provide more space for viewing a dashboard. To switch to the SAS BI Dashboard viewer, in the dashboard title bar, click 📃.

For more information, see Chapter 4, “Dashboard Viewer,” on page 15.

**Change the Dashboard Portlet Title**

To change the title of the dashboard portlet, complete the following steps:

1. In the dashboard portlet title bar, click 📃. The Edit Portlet Properties page appears.
2. In the Name field, type the new name for the portlet.
3. Click OK.

**Manage and Design Dashboards**

If you are a member of the BI Dashboard Administrators group, you can design and modify dashboards as well as view them. If you are a member of this group, the Manage Dashboards icon appears in the dashboard title bar. To open the dashboard in the SAS BI Dashboard designer, click 📃.

For more information, see Chapter 6, “The SAS BI Dashboard Designer,” on page 43.
Log Off from the SAS BI Dashboard Portlet

To log off from the SAS BI Dashboard portlet, you must log off from the SAS Information Delivery Portal. Click Log Off user name in the upper right corner of the user interface, where user name is your portal user name.

Note: If your session is inactive longer than the SAS Information Delivery Portal time-out value, you are automatically logged off.
Part 3

Designing Dashboards

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The SAS BI Dashboard Designer

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Access the Dashboard Designer

Note: You must be a member of the SAS BI Dashboard Administrator group to design and modify dashboards. If you are a member of this group, the following options are available:

• The SAS BI Dashboard viewer toolbar displays Manage Dashboards.

• The SAS BI Dashboard portlet toolbar displays .

You can access the dashboard designer in the following ways:

• by typing the following Web address in your Web browser: http://

  server:port/SASBIDashboard.

  server:port is the Web address of your SAS BI Dashboard server.

  Note: The port and the default root directory for SAS BI Dashboard are set during the installation of the product. The Web address used by your organization might vary.

The SAS BI Dashboard viewer appears. To open the dashboard designer, click Manage Dashboards in the toolbar.

• by clicking in the SAS BI Dashboard portlet toolbar.
The SAS BI Dashboard Designer Interface

Your First Look at the SAS BI Dashboard Designer Interface

The following figure shows the basic features of the dashboard designer.

**TIP** In order to view the entire interface, especially when working with indicators and dashboards, it is recommended that you set your display resolution to 1280 x 1024.

1. Banner.
2. Menu. For more information, see “The Menu” on page 45.
3. Toolbar. For more information, see “The Toolbar” on page 46.
4. Log Off.

**Note:** If the SAS BI Dashboard designer is accessed by way of the Information Delivery Portal, this feature is labeled Return to Portal.
The Menu

The dashboard designer menu provides the following tasks and features for use while designing a dashboard:

File
- **New.** Creates a new indicator data, range, indicator, or dashboard.
- **Open.** Opens an existing indicator data, range, indicator, or dashboard.
- **Close** and **Close All**.
- **Save** and **Save As**.
- **Refresh.** Refreshes the dashboard or indicator in the workspace.

Edit
- **Undo.** Erases the last change that you made to an indicator or dashboard.
- **Redo.** Performs the previously erased change that you made to an indicator or dashboard.
- **Align.** Aligns the layout of the objects in a dashboard in one of the following ways: left margin, right margin, bottom margin, top margin, or horizontal or vertical center. Also adjusts the order of overlapping objects in the following ways: bring to front and send to back. For more information about the alignment tools, see “Align and Size Objects” on page 95.
- **Size.** Sizes the objects in a dashboard or indicator in one of the following ways: to the same height, the same width, or to both the same height and width. For more information about the sizing tools, see “Align and Size Objects” on page 95.
- **Set Up Interactions.** For more information, see “Adding Interactions between Indicators” on page 104.

View
- **Maximize Workspace.** Expands the workspace to its maximum size by collapsing the Objects and Properties panes.
- **Show Layout Guide.** Shows a grid of dots that assists in laying out objects in a dashboard or indicator.
- **Preview Dashboard.** For more information, see “Test a Dashboard by Using Preview Dashboard” on page 127.
- **Go to Dashboard Viewer.** For more information, see Chapter 4, “Dashboard Viewer,” on page 15.

Help
Provides information about the product and a link to the SAS BI Dashboard product Web page. This page provides product documentation and other support information. The menu also provides links to SAS customer support and the SAS home page.
The Toolbar

The dashboard designer toolbar provides easy-to-click icons for tasks that are frequently used with dashboard objects.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Saves the contents of the tab that is currently active in the workspace. The contents can be an indicator, range, indicator data, or dashboard.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Saves the contents of the tab that is currently active in the workspace with a new name. The contents can be an indicator, range, indicator data, or dashboard.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Erases the last change that you made to an indicator or dashboard.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Performs a previously erased change that you made to an indicator or dashboard.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Aligns the layout of the selected objects in a dashboard with the object that was selected first. If only one object is selected, it is moved to the left edge (position 0) of the dashboard. For more information about the alignment tools, see “Align and Size Objects” on page 95.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Aligns the layout of the selected objects in a dashboard with the object that was selected first. If only one object is selected, it is moved to the horizontal center of the dashboard.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Aligns the layout of the selected objects in a dashboard with the object that was selected first. If only one object is selected, it is moved to the right margin of the dashboard.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Aligns the layout of the selected objects in a dashboard with the object that was selected first. If only one object is selected, it is moved to the top margin of the dashboard.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Aligns the layout of the selected objects in a dashboard with the object that was selected first. If only one object is selected, it is moved to the vertical center of the dashboard.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Aligns the layout of the selected objects in a dashboard with the object that was selected first. If only one object is selected, it is moved to the bottom margin of the dashboard.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>When an object on a dashboard is partially or completely underneath another object, brings the selected obscured object to the front. For more information about the alignment tools, see “Align and Size Objects” on page 95.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>When an object on a dashboard is partially or completely covering another object, sends the selected object to the back.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Sizes the objects to the same height. The height used is that of the currently selected object. For more information about the sizing tools, see “Align and Size Objects” on page 95.</td>
</tr>
</tbody>
</table>
## The Objects Pane

### Overview
The dashboard designer Objects pane provides the Library, Layout Templates, and Static Content sections. Each section provides objects that you can use to build dashboards.

### Library Section
The Library section displays the SAS Folder tree and any available dashboard objects, including indicator data, ranges, indicators, and dashboards.

- Click the Show list to filter the objects that are displayed in the tree.
- Double-click an object in the tree to open it. When the object opens, it appears in its own tab in the workspace.
- When a dashboard is open in the workspace, you can drag objects from the section and drop it in the workspace.
- Click ✔️ to refresh the Library section.
- Click 🗑️ to create a new folder in the tree.
- Click ✗ to delete an object from the tree.
  
  **Note:** You can delete a folder only if it is empty.

### Layout Templates Section
The Layout Templates section provides template objects that control the flow of indicators in a dashboard. For more information, see “Using a Template to Lay Out Dashboard Content” on page 100.
**Static Content Section**
The Static Content section provides objects for static content in a dashboard: labels and images. For more information, see “Linking to Other Information by Adding Static Content” on page 98.

**The Workspace**
When you build a dashboard, you interact with the objects that you use to build a dashboard in the workspace.

If you need more room to display a dashboard in the workspace, you can click View ➔ Maximize Workspace to collapse the Objects and Properties panes. Or, you can click << and >> in the upper right corner of each panel. You can expand the panes to their original positions by clicking >> and << on the collapsed panes.

**The Properties Pane**

**Overview**
When you open an indicator or a dashboard, the Properties pane appears. The dashboard designer Properties pane provides properties settings for dashboards, indicators, and static objects.

**Indicator Properties Pane**
If you are viewing an indicator tab, the Properties pane provides the General Settings, Display Settings, and Personalized User Settings sections.

• For information about the General Settings section, see “Setting Indicator Properties” on page 75.

• For information about the Display Settings section and the display settings for each type of indicator, see Appendix 1, “Indicator Dictionary,” on page 131.

• For information about the Personalized User Settings section, see Chapter 13, “Customizing Alerts,” on page 119.

**Dashboard Properties Pane**
If you are viewing a dashboard tab, the Properties pane is context sensitive. When you first open a dashboard, the properties shown are for the dashboard object only. The Dashboard section provides properties that are specific to the dashboard. If you select an object within the dashboard, additional properties specific to that object are displayed in the Objects section of the Properties pane.

• For information about dashboard properties, see “Setting Dashboard Properties” on page 95

• For information about dashboard object properties, see “Setting the Properties of Indicators and Other Objects in a Dashboard” on page 97.

• For examples of using static labels and static images, see “Linking to Other Information by Adding Static Content” on page 98.
Overview

When you design a dashboard in the SAS BI Dashboard designer, you must understand the following concepts:

- the components that make up a dashboard
- folder organization and component names
- the information or data that you want to use in a dashboard

Dashboards and Their Components

A dashboard is a container that has a collection of one or more indicators, and labels and images that enhance the dashboard. Dashboards can display critical information in a way that can be interpreted and monitored at a glance. A dashboard can also contain links to additional types of information, including Web pages, reports, and other dashboards. A dashboard can be displayed in the dashboard viewer or in a portlet on a portal page within the SAS Information Delivery Portal.

Dashboards consist of the following components:

- indicator objects
- static objects

An indicator includes associated indicator data and some indicators include a range.
Folder Organization and Component Filenames

Overview

Before you begin to design dashboards, determine the folder organization and file naming conventions that you want to use.

Component Filenames

When you save a component file, the following file extensions are added automatically.

<table>
<thead>
<tr>
<th>Component</th>
<th>File Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
<td>.dcx</td>
</tr>
<tr>
<td>Indicator</td>
<td>.idx</td>
</tr>
<tr>
<td>Indicator data</td>
<td>.imx</td>
</tr>
<tr>
<td>Range</td>
<td>.rdx</td>
</tr>
</tbody>
</table>

*TIP* You cannot rename a component file, but you can use **Save As** to save a copy of the component file with a new name. If you want to use the file with the new name, you must update the other dashboard components that include the affected file. For example, if you save an indicator file with a new name, you must update that filename in any dashboard that uses that indicator.

Folder Organization

In SAS BI Dashboard 4.3 and later, the storage folders for SAS BI Dashboard exist in the following places:

- the foundation SAS Metadata Repository
- the SAS Content Server

This storage implementation is necessary because SAS BI Dashboard objects have both a metadata component and a content component.

In SAS BI Dashboard 4.3 and later, you can store dashboard component files in SAS folders by using the location of your choice. You can use your own naming conventions and standards. You can organize components into projects that are easier to identify and use.

*TIP* Organize folders that contain dashboard objects such that any folder does not contain more than 100 objects. The response time for navigating through the folders remains below a second when individual folders contain fewer than about 100 objects.

Although you have complete flexibility to organize and name your component files, it is recommended that you save all component files for a dashboard (indicator data, range,
indicator, dashboard) in the same folder. Use the same name for the folder that you use for the dashboard.

Figure 7.1  Recommended SAS Folder Structure

Steps to Complete Before You Design a Dashboard

The SAS BI Dashboard designer has made dashboards easier than ever to create. However, you still need to think about how you want to design your dashboard before you use the dashboard designer.

1. Determine what type of information the dashboard must convey.
2. Choose the indicators that you want to display in the dashboard.
3. Locate or define the necessary data sources.

The indicators that you choose determine the types of data that are required before you can build the dashboard. You might need to create new data sources, calculated fields, or summary tables.

Designing a Dashboard

Designing a dashboard requires the following steps:

1. Define the indicator data.
   
   For detailed steps for creating indicator data, see “Create Indicator Data” on page 57.

   Note: You might need to build a new information map, summary table, or stored process before creating the indicator data object. For more information, see Chapter 8, “Defining Indicator Data,” on page 53.

2. Create a range, if necessary.
   
   For detailed steps for creating a range, see “Create a Range” on page 69.

   Note: You might select an indicator that does not require a range. For more information, see “Indicator Types That Support Ranges” on page 67.

3. Create one or more indicators.
For detailed steps for creating an indicator, see Chapter 10, “Working with Indicators,” on page 73.

4. Create the dashboard and lay out its content.
   For more information, see Chapter 11, “Laying Out Content in a Dashboard,” on page 91.

5. Test the dashboard and its features.
   For more information, see Chapter 14, “Testing Dashboards,” on page 127.
**Overview**

The SAS BI Dashboard *indicator data* object defines the data source and the query that retrieves data for an indicator.

*Note:* Previously, indicator data was referred to as the *data model*.

The core object is the indicator; a dashboard is just a collection of indicators. An indicator never has more than one set of indicator data (and is rarely used without indicator data). SAS BI Dashboard supports the use of four types of data sources:

- SAS Information Maps, which can access relational data and OLAP cubes
- SAS Stored Processes, which can access various types of data
  
  *Note:* SAS BI Dashboard uses a specific type of stored process that generates and publishes WORK data sets to an Archive (.SPK package).
- SQL queries, which can access relational data
- tables, which can access data in a SAS data set that is registered in SAS metadata

*Note:* The SAS BI Dashboard administrator can add access to other data sources.
Data Flow and Dashboards

Before you create a dashboard, you must understand how to create indicator data. Understanding the data flow in the SAS BI Dashboard is the key to building enterprise dashboards that operate efficiently within your organization’s business intelligence system.

Unlike the flow of data in a report (which is usually relatively simple), the flow of data in a dashboard can be very different. Consider the dashboard in your car. Although you see a single representation of the state of the car, the state is actually a collection of different types of data received by the dashboard. The fuel gauge receives data from the fuel tank, the speedometer receives data from the wheels, the battery gauge receives data from the battery, and so on. Like your car’s dashboard, a SAS BI Dashboard can have disparate data sources.

Whereas a report created with SAS Web Report Studio might fill several screens with data from a single information map, a dashboard might render data in a small display that is the result of SQL and JDBC queries and information maps. A dashboard can also render the output of stored processes that produce static images.

By using information maps and SQL queries to retrieve data, you are unconstrained with how the data is laid out at the data set level. For example, you can use computed columns and grouping in the indicator data. After you have the data configured, the lack of constraints helps you to set up initial dashboards quickly.

Guidelines for Defining Indicator Data

Define the Data to Suit the Indicator

Use the following guidelines to define data that suits the indicator:

- Determine the indicator types to use with the indicator data and the required appearance of the resulting indicator. Then, plan the indicator data to meet your needs.

  For example, gauges in a KPI indicator appear best with indicator data that produces summarized data with a limited number of data rows. If you use indicator data with significant amounts of data to drive a KPI indicator, SAS BI Dashboard attempts to produce one KPI gauge representation for each row of data in the indicator data. For significant amounts of data an indicator type that automatically summarizes the data is preferable. Bar charts are an example of this type of indicator.

- To display a single gauge in a KPI indicator, the indicator data must return a single row of data.

- To display multiple gauges in a KPI indicator, each numeric value should be associated with a descriptive name. After you define indicator data, you select the data fields to include in the indicator.

- An indicator type might support only certain date formats. Make sure that your data uses only the date formats that are supported by your selected indicator type. If the data uses a format that the indicator does not support, the date might not display correctly in the indicator.
To determine the supported date formats for an indicator type, open an indicator of the selected type in the dashboard designer. In the Display Settings section of the Properties pane, check the available values in any format lists (such as the X-axis format and Y-axis format lists).

Note: Not all indicator types use date format settings.

Design the Data for Efficient and Responsive Dashboards

Create indicator data so that it executes quickly.

• A single slow set of indicator data can slow the entire dashboard. Even when indicator data returns only a single row of data, if it must first join tables that each contain thousands of rows of data, the indicator data will not perform well.

• Information Maps are useful because you can apply filters to the data. However, if you do not require a filter, you can point your indicator data directly to the table registered in the metadata.

• (Information Map data sources) When you open an indicator data object, the Query Results tab is populated with data. If it takes awhile to for the query results to appear, it is a good indication that you should consider summarizing the data or changing the information map to be more efficient. If the query is slow when you are defining the indicator data object, it will also be slow when executing from a dashboard.

• (Information Map data sources) If you have an information map that was built specifically for a SAS Web Report Studio report, consider building an information map specifically intended for a dashboard. Doing so enables you to optimize the information map for the dashboard.

Aggregate or Summarize the Data

It is a best practice to aggregate the data as much as possible. Doing so ensures the best performance in a dashboard and avoids unexpected results, such as too many rows or gauges, or incorrect summaries.

CAUTION:
The default maximum number of rows returned by any data source is 10,000. If the source data contains more than 10,000 rows, an error message about making an adjustment appears. If possible, aggregate the data to reduce the number of rows to return.

• If the source data has too many rows, summarize the data.

Summarize data at the indicator data or in the source data. Do not rely on the indicator to perform the summary.

TIP For an SQL query, you can summarize data using aggregation functions such as AVG() and the distinct keyword.

Another summarization strategy is to summarize the data into a summary table. The summary table is then used as the basis for the SQL query or as the base table for the information map. In the following figure, the first illustration shows the SAS BI Dashboard indicator data using a query that combines data from multiple tables. The second illustration shows the same two tables being summarized by an ETL program. The SAS BI Dashboard indicator data then uses this summarized table.
Figure 8.1 Alternative Methods for Summarizing Data

The first method is easier to set up and might result in more timely data, but the second method is more flexible and is probably more scalable. You can use a similar strategy when creating information maps that will be used by the SAS BI Dashboard indicator data.

- (Information Map data sources) If you choose fewer columns in the query, it is possible to avoid the row limit or an inefficiently large number of rows.

- (Information Map data sources) An information map data source easily aggregates data in such a flexible manner that a single information map can drive several dashboard indicators.

- Some indicator types support summarizing or averaging data. For a list of these indicator types, see Appendix 2, “Indicator Types that Aggregate Data,” on page 255.

Miscellaneous Guidelines

- (SQL query data sources) The underlying LIBNAME must be pre-assigned.

- (SQL query data sources) When you define an SQL query data source, you create a query that retrieves data from the data source. After you create the query, submit the query for validation. If the query is incorrect, the list is empty, and an error message is displayed.

- (OLAP Information Map data sources) The data returned from an OLAP information map is flattened into a two-dimensional table structure. You assign a role for each dimension when you define the data source. The roles are Column, Row, and Slicer.

Note: You must assign the role of Row to at least one data column.
For dimensions with the role of Row, the levels of each hierarchy are the data fields. The corresponding members of the level are the values of the data field, where the field name is the label for the level. The other data fields are the columns that are typically seen in an OLAP viewer. The field names for the data fields are the comma-delimited levels of the dimensions with the role of Column, in the order of the dimensions with the role of Row.

**TIP** You can use the grouping feature of the bar chart with reference lines indicator with an OLAP information map to create a multi-dimensional display of data.

---

### Create a Stored Process to Use for Indicator Data

Use the following general steps to create a SAS Stored Process that you can use as a source of indicator data in SAS BI Dashboard.

*Note:* These stored processes do not produce visual output. If you want to use a stored process to produce an image for the custom graph indicator, see “Example: Creating a Custom Graph That Uses a Stored Process” on page 87.

1. Write the code for the stored process that does the following things:
   a. creates a SAS data set in the SAS Work library
   b. publishes the data to a SAS Package file using the SAS Publishing Framework
   c. sets the macro variable _ARCHIVE_FULLPATH to the path of the archive file that the stored process generates

   *Note:* The stored process must **not**:
   - include the %STPBEGIN and %STPEND macros
   - produce HTML output. SAS BI Dashboard does not support the display of HTML content.

2. In SAS Management Console, register the stored process in the SAS metadata, designate it as creating a package, and then specify the target data.

   For more information about how to specify the target data, see the SAS Management Console online Help.

3. Save the stored process metadata registration.

The stored process is now ready to use in indicator data.

**TIP** It is recommended that these stored processes be stored in a descriptive folder indicating that the stored processes are for use as a data source in SAS BI Dashboard. Doing so eliminates confusion about mixed types of stored processes and makes it easy to find the correct stored process types.

---

### Create Indicator Data

To create indicator data, complete the following steps in the SAS BI Dashboard designer.

*Note:* If any tabs are open in the workspace, close them.
1. In the workspace, click.

2. In the Create Indicator Data window, type the name to use for the indicator data component.

3. Click OK. A tab using the specified name appears in the workspace.

4. From the Data source list, click the type of data that you want to use for your indicator data.

<table>
<thead>
<tr>
<th>Data source</th>
<th>Go to step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information map</td>
<td>5</td>
</tr>
<tr>
<td>SQL query</td>
<td>6</td>
</tr>
<tr>
<td>Stored process</td>
<td>7</td>
</tr>
<tr>
<td>Table</td>
<td>8</td>
</tr>
</tbody>
</table>

   **CAUTION:**
   
   The default maximum number of rows returned by any data source is **10,000**. If the source data contains more than 10,000 rows, an error message about making an adjustment appears. If possible, aggregate the data to reduce the number of rows to return.

5. If you selected **Information map**, complete the following steps.
a. Next to the **Information map** field, click **Browse**. The Open window appears.

b. Navigate to an information map, select it, and then click **Open**.

c. Move data columns and filters between the **Available items** list and the **Selected items** list by selecting one or more items and clicking the arrows between the lists.

A filter is moved under the **Filters** node. By default, a data column is moved under the **Column** node.

**Note:**

- To make available a filter that contains a user prompt, the prompt must have a default value specified in SAS Information Map Studio.

- If the information map is based on an OLAP cube, the **Selected items** list includes the nodes **Row** and **Slicer**. To use a data column in either of these roles, select **Row** or **Slicer** before moving the data column from the **Available items** list.

d. To move a data column between groups, click the name of a data column in the **Selected items** list, and then move it up or down by clicking one of the arrows that are next to the list.

**Note:** The order of the columns in the **Selected items** list specifies the default sort order for the data that is displayed in an indicator.

e. Go to step 9.
6. If you selected **SQL query**, complete the following steps.

   a. In the **Query** field, type the SQL query code to use.
   
   b. Go to step 9.

7. If you selected **Stored process**, complete the following steps.
a. Next to the Stored process field, click Browse. The Open window appears.
b. Navigate to a stored process, select it, and then click Open.
c. From the Published data set name list, select a data set.
   
   Note: If a stored process does not create a data set, an error message appears when that stored process is selected.

d. (Optional) Click Always add SAS log to server log to have the SAS log added to the server log.
   
   Note: Selecting this option enables you to review the SAS log information later.
e. Go to step 9.

8. If you selected Table, complete the following steps.
a. From the Table tree, select a table. The data columns in the table appear in the Available columns table.

b. From the Available columns table, select the data columns to include in the indicator data by clicking the check box at the end of a row.

c. For each selected data column, select a method to summarize the data from the Summary column.
   
   **TIP** By default, all numeric columns are summarized unless you select (none). Summarization can produce incorrect results for the following values: date, time, and datetime. Be sure to select (none) for these values so they are not summarized.

d. For each selected data column, choose whether to group the data by clicking the check box in the Group By column.

e. To specify additional filters, type the filter (using SQL syntax) into the Filters field.

   **Note:** Do not type the key word where. This causes an error because where is automatically supplied.

9. Click Apply Query Changes. In the Preview Design area, the Data Mapping and Query Results tabs are updated with the data.
10. To view the data that is included in the indicator data, click the **Query Results** tab.

11. To associate a data point property with data columns in the data source, perform the following steps in the **Data Mapping** tab for each data point property.

   **Note:** For more information, see “Data Column Display Attributes” on page 64.

   a. Next to the **Column Name** column, click the check box next to each data point property that you want to include in the indicator.

   b. In the **Label Override** field, type the label to use for the data point property instead of the label from the **Column Name** column.

   c. In the **Value** field, select the name of the column that contains the formatted value of the original value.

      **Note:** KPI indicator subtypes that are gauges display this value at the bottom of each gauge. The value also appears in a tooltip for the gauge.

   d. From the **Hyperlink** list, select a data column in the data source that contains the hyperlink for the data point property.
12. Click File ➪ Save.

13. In the Save As window, type a name and choose a location, such as Products ➪ BI Dashboard 4.4 ➪ DashboardConfigs.

14. Click Save.

15. In the Library section of the Objects pane, navigate to the location that you selected in the Save As window. The indicator data file is located in this directory.

   Note: The filename uses the name that you specified. The file extension is .imx.

16. Close the indicator data tab in the workspace.

---

### Edit Indicator Data

To edit indicator data, complete the following steps in the SAS BI Dashboard designer:

1. In the Library section of the Objects pane, select Indicator data from the Show list.

2. Navigate to the location of the indicator data file that you want to edit, and then double-click the filename. The indicator data tab appears in the workspace.

3. To complete editing the indicator data, see steps 4 through 16 of “Create Indicator Data” on page 57.

---

### Including Additional Data in the Indicator Data

When business users view an indicator, they can view information in tooltips when they position the mouse pointer over data points in the indicator. For example, if you have a bar chart that shows revenue by state, the tooltip displays the state and its revenue for each bar. As of the second maintenance release of SAS BI Dashboard 4.4, the tooltip displays only those data fields in the indicator data that are referenced by the indicator.

---

### Data Column Display Attributes

When you define indicator data, part of the information that you specify is the display attributes for each data column that is retrieved.

The following descriptions are for these fields:

**Column Name**

is the name of the data column. You cannot modify this value.

In each type of indicator, **Column Name** is used as the default value for Label Override.

**Category Label**

is ignored. It is retained for backward compatibility with previous versions of SAS BI Dashboard.
**Label Override**

overrides the value provided by **Column Name**. Use this to provide an easier to understand or more descriptive name for the column.

The following table describes how **Label Override** appears in some types of indicators:

<table>
<thead>
<tr>
<th>Indicator Type</th>
<th>Appearance of Label Override</th>
</tr>
</thead>
<tbody>
<tr>
<td>All indicator display</td>
<td>Appears in lists that provide <strong>Column Name</strong> selections.</td>
</tr>
<tr>
<td>settings</td>
<td></td>
</tr>
<tr>
<td>Custom graph</td>
<td>Appears in the tooltip text to the left of the colon.</td>
</tr>
<tr>
<td>Dynamic prompt</td>
<td>If gauges are displayed in the prompt, the label override does not appear in tooltips for the gauge.</td>
</tr>
<tr>
<td>Graph indicator types</td>
<td>Replaces the original <strong>Column Name</strong> value where it is used in the graph and in the graph tooltips.</td>
</tr>
<tr>
<td>Spark table</td>
<td>Appears in column headings of the table.</td>
</tr>
<tr>
<td>Tooltips</td>
<td>Replaces the original <strong>Column Name</strong> value.</td>
</tr>
</tbody>
</table>

**Value**

is the data column that contains the formatted value that is displayed. This column is optional.

The following table describes how **Value** appears in some types of indicator:

<table>
<thead>
<tr>
<th>Indicator Type</th>
<th>Appearance of Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some graphical indicators</td>
<td>Appear as the X-axis label in some indicators such as targeted bar chart, bar chart with reference lines, and line chart with reference lines.</td>
</tr>
<tr>
<td>Custom graph</td>
<td>Appears as the range value and in tooltip text to the right of the colon.</td>
</tr>
<tr>
<td>Dynamic prompt</td>
<td>Appears as the value in the combo box. It does not appear in tooltip text.</td>
</tr>
<tr>
<td>Dynamic text</td>
<td>Appears as the static text value when the column is selected as the range data source.</td>
</tr>
<tr>
<td>KPI</td>
<td>Appears as the range value in the tooltip text and appears as the value below the gauge.</td>
</tr>
<tr>
<td>Scatter plots and range</td>
<td>Appears in point labels.</td>
</tr>
<tr>
<td>maps</td>
<td></td>
</tr>
<tr>
<td>Spark table</td>
<td>Appears as the column value.</td>
</tr>
</tbody>
</table>
Hyperlink

is the data column that contains hyperlinks.

In each type of indicator, hyperlinks are embedded in gauges or individual data points in graphs.
Chapter 9
Defining Ranges

Overview

A range defines the measurement intervals by which a measure is evaluated, such as below target, on target, and above target. Ranges provide a way for you to separate data values into groups. Ranges also provide options for labels and colors that you can use for each group.

Indicator Types That Support Ranges

Not all types of indicators require that you define a range. The following table describes the range requirements for indicators.

*Note:* You can define alerts only for indicators that you have associated with a range.

For information about defining alerts, see Chapter 13, “Customizing Alerts,” on page 119.

<table>
<thead>
<tr>
<th>Indicator Type</th>
<th>Range Required</th>
<th>Range Optional</th>
<th>Range Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar chart with bullet</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bar chart with reference lines</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bubble plot</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Chart with slider prompt</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Clustered bar chart</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Indicator Type</td>
<td>Required</td>
<td>Optional</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>----------</td>
<td>----------</td>
<td>----------------</td>
</tr>
<tr>
<td>Custom graph</td>
<td>X¹</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dual line chart</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Dynamic prompt</td>
<td>X²</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dynamic text</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Forecast chart</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Interactive summary and bar chart</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interactive summary and scatter plot</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interactive summary and targeted bar chart</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>KPI</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Line chart with reference lines</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multi-line chart</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Needle plot</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pie chart</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Range map</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scatter histogram</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scatter plot</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule chart</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Simple bar chart</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spark table</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stacked bar chart</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Targeted bar chart</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

¹ A range is required if you also select indicator data to use with the custom graph indicator.

² As of the second maintenance release of SAS BI Dashboard 4.31, a range is no longer required when you create a dynamic prompt indicator. However, the range is required if you select the Combo box with gauge setting.
### Create a Range

To create a range, complete the following steps in the SAS BI Dashboard designer:

1. In the workspace, click

2. In the Create a Range window, type the name to use for the range component.

3. Click OK. A tab using the specified name appears in the workspace.

4. (Optional) In the Description field, type a description of the range.

5. For each interval that you want to add to the range, complete the following steps.

   - **TIP** You can add the intervals in any order; the software orders the intervals correctly in the table.
a. Click **Add Interval**. The Add Interval window appears.

b. Type a numeric interval value in the **Upper bound** field and click **OK**. The interval is added to the table of intervals.

   *Note:* Valid input includes a sign, digits, and a locale-dependent decimal separator.

6. For each interval, complete the following steps in the table to define the interval:

   a. For a static gauge, in the **Code Interval** column, select a code interval from the list.

   *Note:* The available intervals vary depending on the gauge.

   b. In the **Relation** column, select an operator from the list, and specify a value in the adjacent **Lower Value** column.

   c. In the **Label** column, click in the cell and type the label.

   d. Click in the **Color** column and select a color from the color palette.

   *Note:* Custom-defined colors ranges are not used by the following indicators:

   - KPI indicator subtypes that are not dynamic. These are any subtypes that do not have *dynamic* in their names.
   - any non-dynamic gauge types that appear in a spark table column.

   e. To delete an interval, click **X** next to the interval.

7. To preview how the range will appear, select a gauge type from the **Dynamic gauge type** list.

   **T I P** The **Preview** area provides an easy way to see how the range appears in different types of dynamic gauges. However, some gauge types do not show the upper and lower range segments.
8. Click File ⇒ Save.

9. In the Save As window, type a name and choose a location, such as Products ⇒ BI Dashboard 4.4 ⇒ DashboardConfigs.

10. Click Save.

11. In the Library section of the Objects pane, navigate to the location that you selected in the Save As window. The range file is located in this directory.

   Note: The filename uses the name that you specified. The file extension is .rdx.

12. Close the range tab in the workspace.

   Note: SAS BI Dashboard administrators can control which users can use the range. For more information, see the SAS Management Console online Help.

---

**Edit a Range**

To edit a range, complete the following steps in the SAS BI Dashboard designer:

1. In the Library section of the Objects pane, select Range from the Show list.

2. Navigate to the location of the range file that you want to edit, and then double-click the filename. The range tab appears in workspace.

3. To complete editing the range, see steps 4 through 12 of “Create a Range” on page 69.
Chapter 10
Working with Indicators

Overview

An indicator is an object that defines the display settings, image types, and links for the measures that appear in a dashboard.

A dashboard can contain one or more indicators. SAS BI Dashboard provides more than 25 types of indicators that you can use. You can select and customize each indicator so that it displays its data in the way that makes the most sense for your organization. Each indicator type has its own display settings. The way an indicator displays its data can vary greatly depending on how you customize the display settings.
Appendix 1, “Indicator Dictionary,” on page 131 provides detailed information about display settings for each indicator type. Before you create the indicators for your dashboard, consider exploring the dictionary and its examples.

Create an Indicator

To create an indicator, complete the following steps in the SAS BI Dashboard designer:

1. In the workspace, click . The Create an Indicator window appears.

2. In the Name field, type the name.

3. From the Display type list, select the indicator type to use.

   Note:
   - For information about the indicator display types, see Appendix 1, “Indicator Dictionary,” on page 131.
   - You can always change the indicator type later. For more information, see “Change the Indicator Type” on page 76.
   - Depending on your selection, additional controls might appear in the Create an Indicator window.

4. If you selected KPI, select the type of gauge to use in the KPI from the Gauge type list.

5. Specify the indicator data to use.

   Note: Some indicator types do not require indicator data.

   - Next to the Indicator data field, click Browse, navigate to the indicator data, and then open it.
   - Next to the Indicator data field, click New. For more information, see Chapter 8, “Defining Indicator Data,” on page 53.

6. If you selected an indicator type that supports the use of a range, specify the range to use.

   - Next to the Range field, click Browse, navigate to the range file, and then open it.
New range   Next to the **Range** field, click **New**. For more information, see “Create a Range” on page 69.

7. If you selected the following indicator types, specify the X-axis range and Y-axis range:
   - Interactive summary and scatter plot
   - Range map

8. Click **OK**. The indicator tab opens in the workspace. Use the **Properties** pane to specify additional settings and features for the indicator. For more information, see “Setting Indicator Properties” on page 75.

---

**Setting Indicator Properties**

**Specify the Height and Width of the Indicator**

You can change the height and width of an indicator in the following ways:

- In the workspace, click the indicator and drag the resize handles.
- In the General Settings section of the Properties pane, change the height and width by editing the values in the **Height** and **Width** fields.

When setting the indicator height and width, remember the following information:
• The height and width settings apply only when the indicator is displayed by itself, not on a dashboard. These width and height properties are the default width and height. You can customize these values further when you add the indicator to a dashboard. When displayed on a dashboard, the indicator height and width are specified in the Object section of the dashboard Properties pane.

• The following indicator types have minimum legible dimensions of 380 x 450 pixels:
  • interactive summary and bar chart
  • interactive summary and scatter plot
  • interactive summary and targeted bar chart

**Change the Indicator Type**

When you created the indicator, you selected the indicator type. However, you can change the selection at any time.

In the General Settings section of the Properties pane, select the indicator type to use from the **Display** list.

<table>
<thead>
<tr>
<th>Indicator Type</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>KPI</td>
<td>If you select <strong>KPI</strong>, see “Customize a KPI Indicator” on page 79.</td>
</tr>
<tr>
<td>Spark table</td>
<td>See “Example: Creating a Spark Table” on page 82.</td>
</tr>
<tr>
<td>All other selections</td>
<td>See “Specify How to Display Data in the Indicator” on page 78.</td>
</tr>
</tbody>
</table>

**Specify the Graph Style**

You can specify a graph styling to apply to your selected indicator. Some selections are easier to read than others. For example, **Simple** and **Crisp** are typically easier to read than **Sheen**. You might want to view the different selections on the computer displays that are used by your business users to make sure a graph style is easy to read on the applicable displays.
Table 10.1  Comparing the Simple and Sheen Graph Styles

<table>
<thead>
<tr>
<th>Simple</th>
<th>Sheen</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Simple Graph" /></td>
<td><img src="image2" alt="Sheen Graph" /></td>
</tr>
</tbody>
</table>

In the General Settings section of the Properties pane, select the graph styling to use from the **Graph style** list. If you do not want to style the data, select *(none)*.

**Change the Indicator Data to Use**

When you created the indicator, you selected the indicator data to use. However, you can change the selection at any time.

In the General Settings section of the Properties pane, complete the applicable step:

- **Existing indicator data** Next to the **Indicator data** field, click **Browse**, navigate to the indicator data, and then open it.

- **New indicator data** Next to the **Indicator data** field, click **New**. For more information, see Chapter 8, “Defining Indicator Data,” on page 53.

**Change the Range to Use**

When you created the indicator, if you selected an indicator type that supported the use of a range, you selected the range to use. However, you can change the selection at any time.

In the General Settings section of the Properties pane, complete the applicable step:

- **Existing range** Next to the **Range** field, click **Browse**, navigate to the range file, and then open it.

- **New range** Next to the **Range** field, click **New**. For more information, see “Create a Range” on page 69.
Specify the Sort Order

You can sort the data that is displayed in some indicator types. The Column Names in the indicator data provide the selections to sort by.

In the General Settings section of the Properties pane, select the column name to use from the Sort by list. If you do not want to sort the data, select (none). From the Sort order list, select whether to sort the data in ascending or descending order.

Note: If no Sort order selection is specified, the incoming indicator data sequence is used by default. You can verify the default ordering by editing the indicator data and viewing the data in the Query Results tab. For indicator data that uses an information map, you can specify the default sort order by changing the order of the columns in the Selected items list.

Specify How to Display Data in the Indicator

The display settings determine which data is included in the indicator, how the data is grouped, how the data is summarized, and so on.

In the Display Settings section of the Properties pane, select the display settings to use for the indicator. The available settings vary depending on the selected indicator. For information about the display settings for each type of indicator, see Appendix 1, “Indicator Dictionary,” on page 131.

Customize Indicator Alerts

Indicators provide the alerting feature in the SAS BI Dashboard. This feature, which is available in the Personalized User Settings section of the Properties pane, is available only for indicators that support ranges. You can create alerts in the following ways:

- Create indicator alerts for a user or groups of users. See “Working with Alerts for Another User or a Group of Users” on page 121.
- Enable a user to create personalized indicator alerts. See “Enable Personalized Indicator Alerts” on page 125.

Define Links in an Indicator

You can define links in an indicator that opens other content. For more information, see “Adding Links to Indicators or Other Content” on page 112.

Specify Default Parameter Values for an Indicator

If the indicator data supports parameters, you can specify default parameter values for the associated indicator. The following types of indicator data support parameters:

- SAS Information Maps that are based on relational tables and contain a filter
- SAS Stored Processes that have parameters registered in the metadata

If the indicator data supports parameters, is available at the top of the Properties pane.
Customize a KPI Indicator

If you select KPI from the Display list, complete the following steps.

Note: For more information, see “KPI (Key Performance Indicator)” on page 189.

1. In the General section of the Properties pane, from the Gauge list, select the type of gauge to use for the indicator.

2. If the Gauge style list appears, select a gauge style.

3. If you select a dynamic gauge, complete the following steps.

   Note: Dynamic gauges include the word “dynamic” in the gauge name.

   a. Click 📊 at the top of the Properties pane. The Gauge Properties window appears. Available settings varies depending on the selected style of gauge.

   ![Gauge properties: Dynamic dial](image)

   b. To display range intervals (tick marks) on the gauge, click Display range intervals, and then select the format from the Interval format list.
c. To specify the dimensions of the gauge, perform one of the following steps in the **Gauge Size** area:
   - Click **Dynamically scale gauges** and then specify the number of columns.
   - Clear **Dynamically scale gauges** and then type values for the height and width.

d. Specify how to orient the gauge by selecting one of the following settings:

<table>
<thead>
<tr>
<th>Flip Vertical</th>
<th>Flip Horizontal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Truck 28</td>
<td>Truck 28</td>
</tr>
</tbody>
</table>


e. To change the colors in the gauge to create a ghost effect, click **Enabled** and select one of the following settings in the **Ghost** area:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Effect on Gauge</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gray scale</td>
<td>Truck 28</td>
<td>The selected interval is a darker gray than the other intervals.</td>
</tr>
<tr>
<td>Setting</td>
<td>Effect on Gauge</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Inactive color  | ![](image)      | The areas that are not part of the selected interval are a specific color. To select the color, click ![image](image).  
Note: In this example, the Inactive color setting is set to purple. |
| Automatic ghost | ![](image)      | The software determines how best to create the ghost colors for the intervals.  
To limit how far away from gray or a neutral color of equal intensity the image varies, type a value in the Decreasesaturation by (%) field.  
To brighten the image, type a value in the Brighten by (%) field.  
Note: In this example, the Decrease saturation by (%) setting is set to 60% and the Brighten by (%) setting is set to 10%. |

f. When complete, click **Close** to exit the Gauge Properties window.

4. (Optional) In the **Sort Settings** area, specify how to sort the displayed data by completing the following steps:
   a. From the **Sort by** list, select the data column to use to sort your data.
   b. From the **Sort order** list, select ascending or descending order.

5. In the Display Settings section of the Properties pane, from the **Range value** list, select the value to which you want to apply the defined range intervals.

6. From the **Range value 2** list, select a second data value point to represent in the gauge. An example of this second data value point is the dot in the following gauge:

   ![image](image)

   *Note: Not all gauges use this property.*

7. From the **KPI title** list, select the title that you want to use for the gauges displayed in the KPI indicator. For example, if you select **Name**, each gauge is titled with a name from the **Name** column in the data.
8. If the values that you selected for the KPI title are long, from the Lines for title list, select the number of lines that you want to reserve for displaying the KPI title.

   Note: If necessary, word wrapping occurs in the middle of the string, but only if you select multiple title lines. If enough lines are not available, the string is truncated to the width of the gauge.

9. Save the indicator. For more information, see “Save an Indicator” on page 89.

Example: Creating a Spark Table

Overview

This example describes how to create a spark table indicator that displays a sparkline in one column and gauges in another column. Depending on how it’s defined, the spark table indicator can show summary data, detailed data, or trend data. Each row can include table data, gauges, or a sparkline.

The following spark table example displays data and gauges in the second column and a sparkline in the third column.

Figure 10.1 Example of a Spark Table Indicator with Gauges and a Sparkline Graph

For more information, see “Spark Table” on page 227.

Identify the Indicator Data to Use

Before you can create the indicator, you must identify the indicator data that you want to use. In this example, the spark table has four columns:

- Product Line
- 2007 Total Sales
- Avg Monthly Sales
- Monthly Sales Trend

Three of these columns aggregate the data that they use:

- The 2007 Total Sales column sums its data.
- The Avg Monthly Sales column averages its data.
- The Monthly Sales Trend column sums its data for the sparkline.

For each of these columns, there must be enough data points in the indicator data to be aggregated.

To display a sparkline, the data must provide the following variables:
- an X-axis variable
- a group-by variable
- a metric variable

This example uses the following indicator data:

<table>
<thead>
<tr>
<th>Actual</th>
<th>Date Order Was Delivered</th>
<th>Product Line</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>127348 2</td>
<td>Jan 2007</td>
<td>Children</td>
<td>Asia</td>
</tr>
<tr>
<td>300431.7025</td>
<td>Jan 2007</td>
<td>Clothing</td>
<td>Asia</td>
</tr>
<tr>
<td>301445.64</td>
<td>Jan 2007</td>
<td>Outdoors</td>
<td>Asia</td>
</tr>
<tr>
<td>565863.2825</td>
<td>Jan 2007</td>
<td>Sports</td>
<td>Asia</td>
</tr>
<tr>
<td>124623.66</td>
<td>Feb 2007</td>
<td>Children</td>
<td>Asia</td>
</tr>
<tr>
<td>207637.0625</td>
<td>Feb 2007</td>
<td>Clothing</td>
<td>Asia</td>
</tr>
<tr>
<td>202575.00</td>
<td>Feb 2007</td>
<td>Outdoors</td>
<td>Asia</td>
</tr>
<tr>
<td>468454.6375</td>
<td>Feb 2007</td>
<td>Sports</td>
<td>Asia</td>
</tr>
<tr>
<td>124680</td>
<td>Mar 2007</td>
<td>Children</td>
<td>Asia</td>
</tr>
<tr>
<td>340445.6675</td>
<td>Mar 2007</td>
<td>Clothing</td>
<td>Asia</td>
</tr>
<tr>
<td>26014</td>
<td>Mar 2007</td>
<td>Outdoors</td>
<td>Asia</td>
</tr>
<tr>
<td>304447.2375</td>
<td>Mar 2007</td>
<td>Sports</td>
<td>Asia</td>
</tr>
</tbody>
</table>

From this indicator data, the column data used for the sparkline variables are:
- an X-axis variable: Date Order Was Delivered
- a group-by variable: Product Line
- a metric variable: Actual

To create the sparkline, the data points that are provided by the source data selection Actual are summed for each product line. Then the sum is plotted for each sparkline by using the Spark X axis selection Date Order Was Delivered. The resulting sparklines show the trend of sales by month for each product line.

**Create the Spark Table Indicator**

To create a spark table indicator for use in a dashboard, complete the following steps in the SAS BI Dashboard designer:

1. In the workspace, click . The Create an Indicator window appears.
2. In the Name field, type the name.
3. From the Display type list, select Spark table.
4. Next to the Indicator data field, click Browse, navigate to the indicator data, and then open it.
5. Click OK. The indicator tab opens in the workspace and the spark table indicator appears with all of the available indicator data columns.
6. You can remove data columns from the spark table that you do not want to display. Complete the following steps.

Note: This removal only affects what the spark table indicator displays. It does not affect the indicator data object itself.

a. Hover over the column heading of the data column that you want to remove. The column menu appears.

b. Click and select Delete column. The column is removed from the spark table. In this example, the Region column and the Date Order Was Delivered column are deleted.

7. In the Properties pane, view the Display Settings section.
   - From the Spark group by list, select the value that you want to group by. In this example, Product Line is selected.
   - From the Spark X axis list, select the value that you want to use for the X axis of the sparkline. In this example, Date Order Was Delivered is selected.

8. To add a column for the sparkline, hover over the column heading of the data column that is to the left of where you want to add the sparkline column. Click and select Add column. The new column appears in the spark table.

9. To configure the new column to display a sparkline, complete the following steps:
Example: Creating a Spark Table

a. If the new column is not highlighted, click the column heading to highlight it.

b. In the Properties pane, view the Column section.

c. From the Source data list, select the metric column to display on the Y axis of the sparkline. In this example, Actual is selected.

d. In the Column title field, enter a title that labels the sparkline. In this example, Monthly Sales Trend is entered. The title labels the trend data for the business user.

e. In the Column width (%) field, select the width to use for the column. In this example, 50 is selected.

f. From the Aggregate function list, select Sparkline to use the sparkline feature in the column.

Note: The Group by selection is Product Line. The data points that are provided by the source data selection Actual are summed for each product line. Then the sum is plotted for each sparkline by using the Spark X axis selection Date Order Was Delivered. The resulting sparklines show the trend of sales by month for each product line.

10. To configure the Avg Monthly Sales column, complete the following steps:

a. Click the column heading to highlight the column and view its properties in the Column section.

b. From the Source data list, select the metric column to display. In this example, Actual is selected.

c. In the Column title field, enter a title that labels the column. In this example, Avg Monthly Sales is entered.

d. In the Column width (%) field, enter the width to use for the column. In this example, 20 is selected.

e. From the Aggregate function list, select Average to provide the average for each product row.

Note: The data points provided by the source data selection Actual are averaged for each product line. The Group by selection is Product Line.

f. From the Format list, select $123,456 to format the average monthly sales data.

g. In the Range field, specify a range definition to use.

h. From the Gauge type list, select the type of gauge that you want to use in the column. In this example, Dynamic radial dial is selected.

i. From the Range Value list, select the value to which you want to apply the defined range intervals. In this example, Actual is selected.

11. To configure the Sales Amount column, complete the following steps:

a. Click the column heading to highlight the column and view its properties in the Column section.

b. From the Source data list, select the metric column to display. In this example, Actual is selected.

c. In the Column title field, enter a title that labels the column. In this example, 2007 Total Sales is entered.

d. In the Column width (%) field, enter the width to use for the column. In this example, 20 is selected.
From the Aggregate function list, select Total to provide the total for each product row.

Note: The data points provided by the source data selection Actual are summed for each product line. The Group by selection is Product Line.

From the Format list, select $123,456 to format the sales total data.

12. To configure the Product Line column, complete the following steps:
   a. Click the column heading to highlight the column and view its properties in the Column section.
   b. From the Source data list, select the metric column to display. In this example, Product Line is selected.
   c. In the Column title field, enter a title that labels the column. In this example, Product Line is entered.
   d. In the Column width (%) field, enter the width to use for the column. In this example, 15 is selected.

13. Adjust the columns in the spark table by clicking to highlight each column heading. Then, in the Column section of the Properties pane, enter the width to use for the highlighted column in the Column width (%) field.

TIP
   • When adjusting the width of the columns in a spark table, work from left to right in the spark table.
   • Use the Column width (%) list to change the column width instead of dynamically resizing the column by dragging the column border. Dragging causes all of the data in the column (such as sparklines) to be recalculated. The recalculation can cause performance delays.
   • Column size changes made by dragging are not saved with the indicator. Only column size changes in the Column width (%) field are saved with the indicator.

14. Click to save the spark table indicator.

The spark table is now available for use in a dashboard. For more information about creating a dashboard, see Chapter 11, “Laying Out Content in a Dashboard,” on page 91.
Example: Creating a Custom Graph That Uses a Stored Process

Overview

This example describes how to create a stored process and a custom graph indicator that uses the stored process. By using a stored process, you can create dashboards that display images created by using SAS/GRAPH.

For more information, see “Custom Graph” on page 156.

Create the Stored Process

When you create the stored process, it must meet the following requirements:

- create an image file in one of the following formats: PNG, JPG, and GIF (but not animated GIF).
- use streaming output.
- write directly to _WEBOUT.
- not include the %STPBEGIN and %STPEND macros.
- not produce HTML output. SAS BI Dashboard does not support the display of HTML content.

The stored process that you want to use must include GOPTIONS statements to direct the output to an image file through the special fileref _WEBOUT. Add the following code at the beginning of the SAS/GRAPH code that creates the image:

```sas
options gsfname=_webout gsfmode=replace;
goptions device=png;
```

Note: The device setting must be GIF, JPG, or PNG.

Be sure to use the following settings in SAS Enterprise Guide:

- Turn off stored process macros.

  In the Stored Process Manager window, view the SAS Code pane. Turn off stored process macros by clicking **Include code for** and clearing the **Stored process macros** selection. The following message appears:

  The append macros setting is disabled and the SAS code does not contain the %stpbegin and %stpend macros.

  Would you like to turn on the append macros setting?

  Click **No** to dismiss the message.

- Specify the stored process server.

  In the Stored Process Manager window, view the Execution Options pane. In the **Execution server** field, select **SASApp — Logical Stored Process Server** and specify the location of the Stored Process server.

- Set the result type to **streaming**.

  In the Stored Process Manager window, view the Execution Options pane. In the **SAS Result Types this Stored Process can Support** are, select **Streaming**.
Run the stored process to make sure the output file is created. It is also a best practice that detects whether your operating system permissions are adequate.

When the stored process is created successfully, complete the following steps to copy the Web address that executes the stored process:

1. Open the Stored Process Web application.
2. Click **List Available Stored Processes**.
3. Locate the stored process that you created and click to open it.
4. Right-click the stored process image in the right pane and select **Properties**.
5. In the Properties window, select and copy the Web address from the **Address (URL)** field.

   *Note:* In some Web browsers, you might have to scroll down while you select the Web address in order to copy the entire Web address.

---

**Create the Custom Graph Indicator**

To create a custom graph indicator for use in a dashboard, complete the following steps in the SAS BI Dashboard designer:

1. Create a new indicator and from the **Display type** list, select **Custom Graph**. For detailed steps, see “Create an Indicator” on page 74.

   *Note:* The custom graph indicator does not require that you select indicator data or a range.

2. In the open indicator, view the Properties pane. In the Display Settings section, in the **Image Web address** field, paste the stored process Web address that you copied from the Stored Process Web application.

   When you paste the URL into the field, remove the complete _ACTION parameter from the URL.

   - Original URL: `http://www.example.com/SASStoredProcess/do?_action=form,properties,execute,no banner,newwindow&_program=%2FShared+Data%2FSTP%2FCustomGraph`
   - Modified URL: `http://www.example.com/SASStoredProcess/do?_program=%2FShared+Data%2FSTP%2FCustomGraph`

   *Note:* This field does not support relative pathnames. If you import or export the custom graph indicator as part of a package, you must update the path in this field.

   For more information, see “Create the Stored Process” on page 87.

3. If the stored process image is accessed from another domain, select **Use proxy**.
4. Click ![save] to save the custom graph indicator.

The custom graph is now available for use in a dashboard. For more information about creating a dashboard, see Chapter 11, “Laying Out Content in a Dashboard,” on page 91.

**T I P**

- When you add the custom graph indicator to a dashboard, if the custom graph is a complex image, consider enabling the zoom feature for the indicator. The
custom graph indicator can appear small in the dashboard, but the user can zoom in on the image to view its detail easily. For more information, see “Enabling Zoom for an Indicator or Static Content” on page 116.

- Test the custom graph in the dashboard by using the preview feature. For more information, see “Test a Dashboard by Using Preview Dashboard” on page 127.

Save an Indicator

To save an indicator, complete the following steps in the indicator tab:

1. Click ![save](image).  

2. In the Save As window, type a name and choose a location, such as Products ⇒ BI Dashboard 4.4 ⇒ DashboardConfigs.

3. Click Save.

4. In the Library section of the Objects pane, navigate to the location that you selected in the Save As window. The indicator file is located in this directory.

   *Note:* The filename uses the name that you specified. The file extension is .idx.

5. Close the indicator tab in the workspace.

Edit an Indicator

To edit an indicator, complete the following steps in the SAS BI Dashboard designer:

1. In the Library section of the Objects pane, select Indicators from the Show list.

2. Navigate to the location of the indicator file that you want to edit, and then double-click the filename. The indicator tab appears in workspace.
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Laying Out Content in a Dashboard

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<th>Page</th>
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</tbody>
</table>
Overview

A dashboard is a container that has a collection of one or more indicators, and labels and images that enhance the dashboard. Dashboards can display critical information in a way that can be interpreted and monitored at a glance. A dashboard can also contain links to additional types of information, including Web pages, reports, and other dashboards. A dashboard can be displayed in the dashboard viewer or in a portlet on a portal page within the SAS Information Delivery Portal.

When you create a dashboard, you can lay out dashboard content in the following ways:

• manually. You can specify each aspect of the layout by making changes to the indicator and dashboard property settings.

• by using a template. You can use a layout template to quickly and easily layout the content of your dashboard. The template dynamically flows the indicator layout to the size of the dashboard. For more information, see “Using a Template to Lay Out Dashboard Content” on page 100.

Considerations

When designing a dashboard, remember the following considerations:

• When a user makes comments about an indicator, the comments are tied to that indicator. Any comments made about the indicator in one dashboard might be inappropriate for that indicator in another dashboard.

• Font settings are stored with the dashboard and not the indicator. These settings must be set for an indicator in each dashboard that uses it.

• (When using a template only) When the SAS BI Dashboard draws the indicators within a dashboard, the indicators are wrapped into rows or columns based on the width or height specified for the individual indicators and the dimensions of the template. For example, if a dashboard has ten indicators with a width of 180 pixels each, the total required width for the dashboard is 1800 pixels. If the dashboard is only 1000 pixels wide, then two rows of indicators appear. If the first indicator is 900 pixels wide, then three rows of indicators appear.

Note: The indicator width is specified when you define the display settings for an indicator. For more information, see “Specify the Height and Width of the Indicator” on page 75.

Because a KPI indicator can contain multiple gauges, special considerations apply when adding KPI indicators to a dashboard:

• A single KPI indicator that contains multiple gauges manages its horizontal alignment correctly. But if there are several indicators, each with only one dynamic gauge, you might need to manipulate the heights of the various dynamic gauges to correctly align the indicators.

This problem often occurs when the title of one indicator has two lines of text and the adjacent indicators have only one line of text. The extra line of text causes the indicator to be positioned farther down the page than the rest of the indicators in the
row. By setting the height for that one indicator to less than the heights of the others, you can align the entire dashboard correctly.

- (Dynamic gauge styles only) You can use disproportionate dimensions to create extra white space around a gauge.

- (Dynamic gauge styles only) A KPI indicator width that is less than the dynamic gauge width causes scroll bars to appear in the dashboard. If you want the indicators to wrap correctly, ensure that the KPI indicator width is larger than the dynamic gauge width.

- (Dynamic gauge styles only) A dynamic gauge grows to fill the space as long as the gauge image scaling remains 1:1. The gauge is always centered in the available space. For example, a dynamic gauge that is 100x200 does not grow, and white space is added around the gauge until the dimensions are at least 200x400. For more information about gauge size, see “Customize a KPI Indicator” on page 79.

- Gauge styles with a fixed size can cause the KPI indicator to flow outside its boundary box. The box is still shown at the original size, but the gauges extend outside the box. If you add more indicators to the dashboard, the gauges in the KPI indicator that extend outside the boundary box are obscured. The results can be difficult to read and this situation should be avoided.

---

**Create a Dashboard**

To create a new dashboard in the SAS BI Dashboard designer, complete the following steps:

1. Click in the workspace when you first open the dashboard designer. The Create a Dashboard window appears.

2. Type the name, and then click **OK**.

3. You can add content to the dashboard in the following ways:
   - To add an indicator to the dashboard, drag an indicator from the Library section of the Objects pane onto the dashboard or into a container.
     
   *Note:* You can add an indicator to the same dashboard only once.
   - To add a label or an image, drag one from the Static Content section of the Objects pane onto the dashboard. For information about static content, see “Overview” on page 98.
   - To add a template to the dashboard, drag one from the Layout Templates section of the Objects pane onto the dashboard. For more information, see “Using a Template to Lay Out Dashboard Content” on page 100.

4. Set the dashboard properties. For information, see “Setting Dashboard Properties” on page 95.

5. Set the properties of the objects that you added to the dashboard. For information, see “Setting the Properties of Indicators and Other Objects in a Dashboard” on page 97.

6. Click to save the dashboard.

7. In the Save As window, type a name and choose a location, such as **Products** ⇒ **BI Dashboard 4.4** ⇒ **DashboardConfigs**.
8. Click **Save**.

9. In the Library section of the Objects pane, navigate to the location that you selected in the **Save As** window. The dashboard file is located in this directory.

   **Note:** The filename uses the name that you specified. The file extension is .dcx.

10. Test the dashboard. For information about testing and viewing the dashboard, see Chapter 14, “Testing Dashboards,” on page 127.

11. Close the dashboard tab in the workspace.

   For information about features that you can use in the dashboard workspace, see “Working in the Dashboard Workspace” on page 94.

---

## Working in the Dashboard Workspace

### Change Object Definitions

You can change the definitions of objects (indicators or static content) in a dashboard in the following ways:

- To edit how an object appears or behaves in the dashboard, select the object. In the Object section of the Properties pane, change the property settings for the object.

- To edit the object itself, select the object. The object toolbar appears.

![Object Toolbar]

The toolbar provides the following functions if they are applicable to the selected object:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![X]</td>
<td>Deletes the object from the dashboard.</td>
</tr>
<tr>
<td>![Open Indicator]</td>
<td>Opens the indicator in the Indicator workspace so you can edit the indicator. For more information, see Chapter 10, “Working with Indicators,” on page 73.</td>
</tr>
<tr>
<td>![Open Indicator Data]</td>
<td>Opens the indicator data definition in the Indicator Data workspace so you can edit the indicator data definition. For more information, see Chapter 8, “Defining Indicator Data,” on page 53.</td>
</tr>
<tr>
<td>![Open Range]</td>
<td>Opens the range definition in the Range workspace so you can edit the range definition. For more information, see Chapter 9, “Defining Ranges,” on page 67.</td>
</tr>
</tbody>
</table>

**Note:** This selection is available only for indicators that support ranges.
**Align and Size Objects**

For information about the alignment and sizing toolbar icons, see “The Toolbar” on page 46.

**TIP**  
To make aligning an object easier, display a grid of dots on the dashboard background by clicking View ⇒ Show Layout Guide.

To align and size objects in the dashboard, complete the following steps:

1. Click the object that you want to use to align or size other selected objects.
   
   *Note:* If there is only one object on the dashboard and you select the object and then an alignment, the object is aligned to the dashboard itself. For example, selecting a single indicator in the dashboard and then clicking Edit ⇒ Align ⇒ Align Top moves the indicator to the top of the dashboard.

2. Hold down the CTRL key, and then click one or more objects.

3. Select one of the following alignment or sizing options:

   • For alignment options, click Edit ⇒ Align, and then select an alignment method.
   
   • For size options, click Edit ⇒ Size, and then select a size method.

   *Note:* The height or width used is that of the currently selected object.

**Undo and Redo Changes**

When you make changes to a dashboard or an object in the dashboard, you can undo or redo your changes.

• To undo a change, click 🔄.

• To redo a change, click 🔄.

---

**Setting Dashboard Properties**

**Specify the Height and Width of the Dashboard**

In the Dashboard section of the Properties pane, change the height and width by editing the values in the Height and Width fields.

**Specify How the Dashboard Is Laid Out**

You control how objects in a dashboard are laid out in the following ways:

| Horizontal flow | Positions objects horizontally on a dashboard, and then wraps to new rows as needed. |
Precision

Positions objects on a dashboard at the precise location that is specified by the Left and Top settings for the object. You can find these settings in the Object section of the Properties pane.

*Note:* Objects can overlap or completely cover other objects when displayed in the dashboard viewer. Such overlapping might prevent business users from interacting correctly with the objects.

Vertical flow

Positions objects vertically on a dashboard, and then wraps to new columns as needed.

To specify the layout setting, view the Properties pane in the dashboard tab. In the Dashboard section, select a layout from the Layout list.

**View a Graphical Representation of Interactions**

If you create interaction between indicators, select Show interactions to display arrows between the affected indicators. The arrows show which indicators are source and target indicators. For more information, see “Adding Interactions between Indicators” on page 104.

**TIP** The Show interactions feature is a useful way to make sure the interactions are correct.

**Specify the Fonts Used in the Dashboard**

In the Font Settings group, select the type and style of font that you want to use in the dashboard. The selection affects the indicator title bar and indicator labels.

*Note:*

- For the best appearance of fonts in a dashboard, specify the same zoom value for all of the indicators in the dashboard. Set the zoom width and height to the same value, generally between 100% and 300%.

- In the Font Settings area, some of the types that you can select include (preferred) in the name. Preferred means that the size of the font that you specify applies only if the indicator is large enough to accommodate the text. However, the indicator component determines the best size of the font, which is based on the size of the indicator and an algorithm that shrinks text so that the indicator and the text are legible at smaller sizes.

- Font settings are available for indicators only when indicators are contained in a dashboard. When editing the indicator as an object in a dashboard, select the indicator and view the Object section of the Properties pane.
Setting the Properties of Indicators and Other Objects in a Dashboard

**View Indicator or Object Properties**

Dashboards can contain indicators, static images, and static labels. To view and edit the properties on an indicator or object, you must select it in the dashboard. Then, in the Properties pane, the Object section appears and you can edit the properties of the selected indicator or object.

**Specify the Title Bar Text or Label Text**

In the Setup group, you can specify the object name. For indicators and static images, the name appears on the title bar. For static labels, the name is the label itself.

**Locate the Indicator File**

In the Setup group, the location of the indicator file is provided. **Tip** If you have multiple indicators that use the same name, but are located in different directories, the location information helps you identify which indicator you are working with.

**Specify the Position of the Object**

If you set the dashboard Layout setting to Precision, use the Position group to set the position of the top left corner of the object on the dashboard.

**Size the Object in the Dashboard**

You can size an object by either dragging its resize handles to the size that you want or by using the Size group to set the size of the object. **Note:** For indicator objects, this size takes precedence over the dimensions set in the indicator definition. This means that you can use the same indicator in different dashboards and the indicator is displayed with different dimensions in each dashboard.

**Enable the Zoom Feature for an Object**

Use the Zoom (%) group to set the zoom feature on an object. For more information, see “Enabling Zoom for an Indicator or Static Content” on page 116.

**Add Links from an Object**

For static labels and images, use the Link Setup group to define a link from the object to another source of information. For indicators, you must set up the link in the indicator
definition. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Enable the Object Title Bar and Tools When Viewing the Dashboard

For each object, you control whether business users have access to the object title bar and its tools when they view the dashboard. This title bar provides the features for printing, making comments, zooming, and adding favorites. It also displays the object title. To enable the title bar, select Show toolbar and border in the Options group.

Specify the Image to Use for Static Image

If you add a static image to the dashboard, you must specify the image to display in this object. Enter the location of the image in the Image Web address field in the Options group.

When you specify an image, you must also specify whether to use a proxy.

- If the image file is available on the same network domain as the SAS BI Dashboard server, do not select Use proxy.
- If the image is on a different network domain, select Use proxy.

Note: Authentication of the image is not supported. If the image is not authenticated, no image appears.

Specify the Font to Use for Static Label

In the Options group, you can specify the font and text alignment for the static label. You can also remove the drop shadow effect. These settings are not affected by the dashboard font setting.

TIP If the static label includes a link, specify a Rollover color. When the business user hovers over the link, the color changes to indicate the link presence.

Linking to Other Information by Adding Static Content

Overview

You can include content in a dashboard that is not an indicator. This content is called static content. SAS BI Dashboard provides two types of static content objects: image and label. Both of these objects can link to other information. By using static content, you can create menus and other ways to navigate from a dashboard to other types of information.

TIP You can improve the performance of your dashboard if you provide links in the dashboard that display other dashboards in the same instance of SAS BI Dashboard viewer. Creating a menu in a dashboard is way to provide such links. See the following example for more information.
**Example: Add a Menu to a Dashboard by Using Labels**

This example uses the static content label type to add a menu of Web pages to a dashboard. In this example, the Web page menu provides the product pages associated with the products that are on the dashboard.

To add a menu to a dashboard, complete the following steps:

1. Open a dashboard in which you want to add a menu of links.
2. In the Objects pane, expand the Static Content section.
3. Click and drag the **Label** object onto the dashboard.
4. In the dashboard, click the label object. The label properties appear in the Properties pane.
5. In the **Name** field, enter a name for the menu item, for example, *Orion Star Golf Clubs*.
6. (Optional) In the **Options** group, you can specify the font to use for the label. For more information, see “Specify the Font to Use for Static Label” on page 98.
7. In the **Link Setup** group, you can specify the link that the label opens. For example, if you are specifying a menu of product Web pages, you can specify the Web address for golf clubs. For more information, see “Adding Links to Indicators or Other Content” on page 112.
8. If you want to adjust the position and size of the label, you can change the property settings in the **Position** and **Size** groups, or you can drag the label object in the dashboard and size the label by adjusting its border. For more information, see “Specify the Position of the Object” on page 97 and “Size the Object in the Dashboard” on page 97.
9. To add more menu selections to the dashboard, repeats steps 3 through 8.

**Example: Add a Contact List to a Dashboard by Using Images**

This example uses the static content image type to add a contact list of salespeople to a dashboard. The contact list provides the salespeople associated with the products that are on the dashboard.

To add a contact list to a dashboard, complete the following steps:

1. Open a dashboard in which you want to add a contact list.
2. In the Objects pane, expand the Static Content section.
3. Click and drag the **Image** object onto the dashboard.
4. In the dashboard, click the image object. The image properties appear in the Properties pane.
5. In the **Name** field, enter a name for the object (for example, the name of one of the salespeople).
6. (Optional) In the **Options** group, specify the Web address location for the image file (for example, a picture of the salesperson). For more information, see “Specify the Image to Use for Static Image” on page 98.
7. In the **Link Setup** group, set up the link that the image opens (for example, the telephone number for the salesperson). For more information, see “Adding Links to Indicators or Other Content” on page 112.

8. If you want to adjust the position and size of the label, you can change the property settings in the **Position** and **Size** groups, or you can drag the label object in the dashboard and size the label by adjusting its border. For more information, see “Specify the Position of the Object” on page 97 and “Size the Object in the Dashboard” on page 97.

9. (Optional) In the **Zoom** group, you can enable zooming for the image. For more information, see “Enabling Zoom for an Indicator or Static Content” on page 116.

10. To add more salespersons to the contact list, repeats steps 3 through 9.

---

### Using a Template to Lay Out Dashboard Content

**Overview**

SAS BI Dashboard provides two layout templates that you can use when designing dashboard content:

- horizontal
- vertical

Each layout template controls the flow of the indicators that are displayed in the template. The horizontal and vertical flow templates automatically arrange (in the indicated direction) the indicators that they contain. When the indicators exceed the width or height of the template, the layout of the indicators is wrapped.

**Note:** When an indicator is contained by a horizontal or vertical template, the following behaviors occur:

- The zoom setting of the template affects all of the contained indicators in the same way.
- No titles appear on the indicators.

**Lay Out Dashboard Contents by Using a Template**

To lay out dashboard content by using a template, complete the following steps in a dashboard:

1. In the Objects pane, expand the Layout Templates section. The available templates appear.

2. Drag a template onto the dashboard workspace.

**Note:**

- You can add more than one template to a dashboard. However, you must manually adjust their location in the dashboard.
- To delete a template from the dashboard, hover your mouse over the template. The template toolbar appears. Click X.
3. In the dashboard workspace, click the template. The Objects section appears in the Properties pane.

4. In the **Setup** group, type a name for the template in the **Name** field and press Enter. The name appears in the template title bar.

5. In the Objects pane, expand the Library section.

6. Locate an indicator and drag the indicator onto the template in the dashboard workspace.

7. Continue to add indicators to the template until you are satisfied.

   *Note:* You can add an indicator to the same dashboard only once.

---

### Edit an Existing Dashboard

To edit an existing dashboard, complete the following steps in the SAS BI Dashboard designer:

*Note:* When you edit a dashboard, you change it for all users.

1. In the Library section of the Objects pane, select **Dashboard** from the **Show** list.
2. Expand the tree to view available dashboards.
3. Double-click a dashboard to open it.

---

### Save a Dashboard with a New Name

In SAS BI Dashboard, you cannot rename a dashboard. However, you can save a dashboard with a new name. Complete the following steps:

1. Select **File** => **Save As**. The **Save As** window appears.
2. Navigate to a location.

3. Type the new name in the Name field, and then click Save.
Chapter 12
Adding Interactive Features to Dashboards

Overview

You can add the following types of interactive features to a dashboard:

- Add two indicators to the dashboard and specify an interaction between them. When users click data in one indicator, the second indicator updates its data display.

- Add a link in an indicator. When users click a data point in the indicator, a link can open additional content, such as a Web page, a portal page, a SAS Stored Process, a Web report, and more.

- Enable zooming of an indicator. When users click the zoom icon, they can zoom in, or magnify, the indicator.

- Add an indicator that includes a slider prompt to the dashboard. Users can move the slider on the chart to view how the data varies across time.
Adding Interactions between Indicators

Overview

When you add two or more indicators to a dashboard, you can choose to have one indicator interact with one or more other indicators. The first indicator (the source) influences a second indicator (the target). Interactions enable business users to explore data directly within the dashboard.

Types of Interactions

There are three types of interactions:

Highlight data interactively
Also called data brushing, this type of interaction specifies that when the business user selects a specific value in the source indicator, related values in the target indicator are highlighted.

Filter data on a local system
Also called client-side filtering, this type of interaction specifies that when the business user selects a specific value in the source indicator, data in the target indicator is filtered, based on the selection.

This interaction filters data that is stored on the business user's computer. The filter can operate against any target parameter, and the filter can be very responsive. However, because this filter requires that a target indicator first load all data onto the business user's computer, load times might be long, and there is an upper limit to how much data can be used. If you are filtering more than 1000 lines of data, you must filter data on a remote server.

Filter data on a remote server
Also called server-side filtering, this type of interaction is conceptually the same as filtering data on a local system, except that the parameters are put into the query and the query is sent to the middle tier (the server) with the new parameters. Typically, this type of filter is not as responsive as a filter on a local system because of the time required to communicate with the middle tier, and the target parameters can be only parameters that are understood by the query. However, if you are filtering more than 1000 lines of data, you must filter data on a remote server.

Note: As of the second maintenance release of SAS BI Dashboard 4.31, all types of interaction support multiple selection. This enables the business user to select multiple items in the source indicator and highlight all of the affected items in the target indicator. For example, if you select more than one bar in a bar chart, all the affected rows in a target table indicator are highlighted. To select more than one item in a source indicator, press the CTRL key while clicking the items in the indicator. To support multiple selection in a filter data interaction, you must set up the indicator data source as required. For information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.


**Example of Interactive Highlighting**

The following display is an example of a dashboard with two indicators. There is no interaction set up between the indicators, so as a business user explores data in one indicator, the other indicator remains static.

A dashboard designer then modifies the dashboard that contains the indicators in the SAS BI Dashboard designer:

1. The dashboard designer sets up an interaction so that the source data **Make** in the bar chart indicator is mapped to the target data **Make** in the spark table indicator.

2. The designer selects the interaction type **Highlight data interactively**.

When a business user clicks a car make in the Average City MPG bar chart indicator, the following actions occur:

1. The data **Make** in the bar chart indicator is set to the car make that the business user clicked.

2. The data **Make** in the spark table indicator is also set to the car make that the business user clicked. This is because the data **Make** in the bar chart indicator is mapped to the data **Make** in the spark table indicator.

3. The interaction is then processed, which results in the car make being highlighted in the spark table indicator.
In the SAS BI Dashboard designer, this indicator interaction is shown by an arrow from the bar chart indicator to the spark table indicator.

To display this arrow, the dashboard designer selects **Show interactions** in the dashboard Properties pane.
Later, when the business user explores data in the modified dashboard, the car make clicked by the user in the bar chart indicator highlights the car make data in the spark table indicator.

Indicator Types That Support Interactions

Support for Data Filtering
When you click a data point in the source indicator, the data displayed by the target indicator changes to reflect the data point that you clicked. To set up data filtering, you must select a source indicator and a target indicator.

Not all indicator types support data filtering. The following tables list the exceptions to support. If an indicator type is not in the table, you can use that indicator type either as a source or a target indicator.

Note: If you are filtering more than 1000 lines of data, you must use filtering on a remote server.

Table 12.1 Exceptions to Indicator Type Support for Filtering Data on Local Systems

<table>
<thead>
<tr>
<th>Indicator Type</th>
<th>Use as Source</th>
<th>Use as Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamic text</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Support for Interactive Highlighting

To set up interactive highlighting (also called data brushing), you must select a source indicator and a target indicator. Unless an indicator type is listed in the following table, you can use an indicator type either as a source or a target indicator.

Not all indicator types support interactive highlighting. The following table lists the exceptions to support. If an indicator type is not in the table, you can use that indicator type either as a source or a target indicator.

---

### Table 12.2 Exceptions to Indicator Type Support for Filtering Data on Remote Servers

<table>
<thead>
<tr>
<th>Indicator Type</th>
<th>Use as Source</th>
<th>Use as Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart with slider prompt</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Dynamic text</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Interactive summary and bar chart</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Interactive summary and scatter plot</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Interactive summary and targeted bar chart</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

---

### Table 12.3 Exceptions to Indicator Type Support for Interactive Highlighting

<table>
<thead>
<tr>
<th>Indicator Type</th>
<th>Use as Source</th>
<th>Use as Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart with slider prompt</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Dynamic prompt</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Dynamic text</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Interactive summary and bar chart</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

---

1. Includes all KPI indicator subtypes.
2. To use a spark table indicator as a target, the [Spark group by](und) and [Spark X axis](und) settings must be set to (none). This means that you cannot show a sparkline when you use a spark table indicator as a target for a filter.
### Guidelines for Defining Interactions

#### General
Use the following guidelines when designing interactions.

- (Interactive highlighting) You can specify more than one target indicator.
- (Interactive highlighting) You can specify only one parameter for highlighting.
- You can chain interactions, such as indicator A that interacts with indicator B, which in turn interacts with indicator C.
- When you define an indicator with both a link and an interaction, the link takes precedence over the interaction when the link opens in the same window as the interaction. For example, if you create a dashboard that opens a report and that interacts with another indicator, when the business user clicks the indicator, the report opens in the current window. If the link opens in a new window, then the business user sees the interaction in the current window and the link in a new window. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

#### Parameter Mapping
You can specify how one indicator influences another indicator by using parameters. A source indicator parameter is mapped to a target indicator parameter.

**Note:** In order to pass parameters between indicators, the target indicator must be based on either of the following data sources:

- information map with prompted filters
- stored process with parameters defined

- You can specify more than one target indicator parameter.
- The source indicator parameter and the target indicator parameter are not required to have the same name, but they must reference the same type of data. For example, the source indicator can have a data column named REGION_ID and the target indicator can have similar data contained in a data column named SALES_REGION_ID. By mapping REGION_ID to SALES_REGION_ID, you link together the two data columns.

- The data can be contained in different data sources and different types of data sources. For example, a source indicator can have indicator data from an SQL query that maps to a target indicator that has indicator data from a stored process.

- Optional parameters are not available for the following link types:

---

1 Includes all KPI indicator subtypes.
2 The KPI does not support selection of multiple gauges.
Indicator Data

The following guidelines describe data restrictions when using interaction.

Interactive highlighting

Any type of indicator data can be used for interactive highlighting.

Filtering data on a local system

Any type of indicator data can be used for this type of interaction.

**CAUTION:**

Do not specify a default value for the mapped parameters that severely limits the amount of data returned by the indicator data. This limited data, when filtered further on the local system, can reduce the amount of data to few, or no, matching rows.

Filtering data on a remote server

- The only indicator data that can be used with this type of interaction is a stored process or an information map that is based on relational tables. In both cases, you must supply a default value for a prompt.
- Unlike filtering data on a local system, which can be based on a target parameter that does not have a prompt defined in the target indicator data, filtering data on a remote server can be based only on a target parameter that is defined in the target indicator data.
- An information map must have at least one filter defined, and this filter must be a mapped parameter.

**CAUTION:**

Do not change the default value of a prompt in another application while SAS BI Dashboard is running. Log off from SAS BI Dashboard, change the value, and then log in again.

- When using a prompt based on a date with an information map, ensure that you pass values to the prompt in a format that the prompt accepts. For more information, see Appendix 3, “Valid Date Formats for Information Maps,” on page 257.

Set Up an Indicator Interaction

To set up an interaction between one or more indicators, complete the following steps in the dashboard workspace:

1. Add at least two indicators to a dashboard.
2. Select the indicator to be the source of the interaction, and then click the Set Up Indicator Interactions window appears.
3. In the **Available Target Indicators** group, the table lists the other indicators that are available in the dashboard. Select one or more of these indicators to be targets of the interaction.

4. For each selected indicator, select the type of interaction to use from the list in the **Interaction Type** column.

5. For each selected indicator, select the source data column to use from the list in the **Source Data** column. When the user clicks this data in the source indicator, the interaction is initiated.

6. For each selected indicator, select the target data column to use from the list in the **Target Data** column. When the user clicks the source data in the source indicator, the target data reacts in the target indicator.

   **Note:** The target indicator data, either information map or stored process, must have a prompted filter. When you set up the interaction, the only Target Parameter choices that are available are prompted filters.

7. Click **OK** to save the interaction and exit the window.

   **TIP** After you have set up the interactions, click **Show interactions** in the dashboard Properties pane to graphically view the interactions. To test the interaction, you must open the dashboard in the SAS BI Dashboard viewer or SAS BI Dashboard portlet.

---

**Supporting Multiple Selections in a Filtered Data Interaction**

**Overview**
As of the second maintenance release of SAS BI Dashboard 4.31, you can now add support in a source indicator such that multiple selections affect the data filtering in the target indicator.

The indicator data used by the target indicator must be one of the following types:

- SAS Information Map with prompted filters
SAS Stored Process with parameters defined

Support for Multiple Selection in Filtered Data
To set up multiple selection support for data filtering, you must select a source indicator that supports multiple selection for data filtering.

Not all indicator types support multiple selection. The following indicators do not provide this support. If an indicator type is not in this list, you can use that indicator type as a source indicator.

- chart with slider prompt
- custom graph
- dynamic prompt
- dynamic text
- interactive summary and bar chart
- interactive summary and scatter plot
- interactive summary and targeted bar chart
- KPI

Requirements for SAS Information Maps
For a SAS Information Map to support multiple selections, you must make the following selection when creating a prompted filter in SAS Information Map Studio:

1. In the Edit Prompt window, click the Prompt Type and Values tab.
2. In the Number of values list, select Multiple values.
3. Click OK.

Requirements for SAS Stored Processes
For a SAS Stored Process to support multiple selections, you must use the %_EG_WHEREPARAM macro that is provided by SAS Enterprise Guide. The following code shows an example of how to use this macro:

```sas
PROC SQL;
CREATE TABLE WORK.RESULTS AS
    SELECT * from mydata.sales WHERE %_eg_WhereParam(year, yearPrompt, IN, TYPE=N);
QUIT;
```

declares reference to a prompt variable.

The following variables are used in the macro:

- `yearPrompt` is the prompt for a year,
- `yearPrompt0` represents the first value,
- `yearPromptN` represents the Nth value.

See the SAS Enterprise Guide documentation for more information about this macro.

---

Adding Links to Indicators or Other Content

Overview

You can add a link from an indicator to any of the following content:

- another SAS BI Dashboard indicator
Indicator Types That Support Linking

You can define a link for an indicator that opens another source of information.

Note: The following indicator types do not support links:
- chart with slider prompt
- dynamic prompt
- dynamic text

You can define a link to another indicator.

Note: You cannot link to the following indicator types:
- interactive summary and bar chart
- interactive summary and scatter plot
- interactive summary and targeted bar chart

Tip: When you link to an indicator, the indicator does not use any font settings. Font settings are applied to indicators only when they are contained in a dashboard.

Link Types that Support Parameters

Some link destinations support the passing of parameters. You can use these parameters to customize how a link destination opens. If you open a dashboard, for example, you can specify the initial values of the prompts in the dashboard. The following link types support passing parameters:
- a SAS BI Dashboard indicator
- a SAS BI Dashboard dashboard
  
  Note: Support was added as of the second maintenance release of SAS BI Dashboard 4.31.
- a SAS Stored Process
- a SAS Web Report Studio report
  
  Note: You can pass parameters only if you are linking to a prompted Web report.
- an external link to a Web address
If the selected link type supports parameters, you can select the column data that contains the parameter values that you want to use from the Parameter Data list when you set up the link.

Set Up a Link in an Indicator

To set up a link in an indicator, complete the following steps in the indicator tab:

1. Click at the top of the Properties pane. The Set Up Link window appears.

![Set Up Link window]

Note: The following indicator types do not support links:
- chart with slider prompt
- dynamic prompt
- dynamic text

2. From the Link type list, select the type of link that you want to set up.

Note: As of SAS BI Dashboard 4.4, the Portal page option from previous versions is no longer supported for links. To add a link to a portal page, select External link as the link type, and then provide the URL of the portal page in the Link field.

3. From the Link target list, select to open the link target in either the current window or a new window.

4. In the Link field, complete the applicable step:

<table>
<thead>
<tr>
<th>For an external link</th>
<th>Type the Web address of the link in the Link field.</th>
</tr>
</thead>
<tbody>
<tr>
<td>For all other selections</td>
<td>Click Browse next to the Link field, and then select an item. The available choices vary depending on the type of link.</td>
</tr>
</tbody>
</table>

5. (Optional) For an external link, indicator, dashboard, SAS Stored Process, and SAS Web Report Studio report, complete the following steps in the Optional Parameters
to Use in the Link table. For more information, see “Examples of Passing Parameters” on page 116.

**Note:**

- (Indicators and dashboards only) Any available parameters are automatically provided in the Optional Parameters to Use in the Link table. If the target object does not accept parameters, the Optional Parameters to Use in the Link table is empty.
- (SAS Web Report Studio report only) You can pass parameters only if you are linking to a prompted Web report.

a. Click ➕. The Parameter Name field and Parameter Data list appear in the table.

![Optional Parameters to Use in the Link](image)

**Note:** If you select SAS Web Report Studio report for the link type, the Displayed Text field appears in the first column of the table.

b. In the Parameter Name field, enter the name of the parameter that you want to pass in the link.

**Note:**

- If you select SAS Stored Process, the Parameter Name points to the parameter in the stored process. You must type & before the parameter name (for example, &model).
- The name must match the expected name exactly, including case.
- If you select SAS Web Report Studio report for the link type, enter the text that you want displayed by the report in the Displayed Text field.

c. From the Parameter Data list, select the data that you want to pass in the link.

**Note:** The parameter data is the corresponding data column in the indicator data (for example, Car).

d. You can add more parameters to the table. To change the order of the parameters, select a parameter, and then click the arrow buttons next to the parameter table.

To delete a parameter, select a row and then click ✗ next to the row.

6. To save the link and exit the window, click OK.

7. Click ![button](image) to save the link definition in the indicator.

**TIP** To test the link, you must open the indicator, or the dashboard that contains the indicator, in the SAS BI Dashboard viewer or SAS BI Dashboard portlet.
Examples of Passing Parameters

In this first example, an external link to the Google Web page is specified. The parameters in the link generate a search on Google. In this example, the following optional link parameters are specified:

- In the **Parameter Name** column, *select_date* is selected.
- In the **Parameter Data** column, *date* is selected.

The following link is generated:

```http
http://www.google.com/search?hl=en&q={select_date}
```

The second example describes linking to a SAS Stored Process. In this example, a KPI indicator references SASHELP.CLASS and the indicator display setting called **Range Value** is set to AGE. The following optional link parameters are specified:

- In the **Parameter Name** column, *select_age* is selected.
- In the **Parameter Data** column, *Age* is selected.

The selected stored process called *Stored Process with Parameter* is defined as follows:

```
(stpWithParamater.sas)
   goptions gsfname=_webout gsfmode=replace;
   goptions device=png;
   data temp; set sashelp.class;
   if age="&select_age" then output;
   run;
   proc gchart data=temp; vbar age / discrete; run; quit;
```

Enabling Zoom for an Indicator or Static Content

**Overview**

The zoom feature enables the user to zoom in on, or magnify, the affected indicator. Not only does this feature enable zooming, but it also specifies how large the indicator can appear when zoomed. When zooming is enabled, the indicator title bar displays the **Zoom + icon**.

*Note:* The zoom feature is enabled only if the indicator title bar is enabled also. Select **Show toolbar and border** to enable the title bar.

**Dashboard Design and the Zoom Feature**

When an indicator is *not* zoomed, some of the indicator content might not appear or might be difficult to read. When you click **», the indicator enlarges and the content appears as designed. However, other indicators in the dashboard might be obscured by the enlarged indicator. Click **« to reduce the indicator to its original size.

When you enable the zoom feature, you can specify the percentage to magnify the indicator when the user chooses to zoom. For example, if you want to magnify an indicator two times, you specify a zoom factor of 200%.
To disable the zoom feature, specify a zoom factor of 100%.

You can use the zoom feature to save space by making an indicator small in the dashboard, but giving users the ability to zoom in if they want more details. You can assign a different zoom setting to each indicator in a dashboard. Although the zoom feature is set on the indicator, the setting is actually associated with the dashboard that contains the indicator. If you use the indicator in more than one dashboard, the indicator can have a different zoom setting in each dashboard that contains it.

Note:

- All indicator types support this feature except dynamic prompt.
- Static content also supports zoom.
- When an object is contained by a horizontal or vertical layout template, the zoom setting of the template affects the contained objects in the same manner. For more information, see “Using a Template to Lay Out Dashboard Content” on page 100.

Enable Zoom

To enable zoom in an indicator, complete the following steps:

1. In an open dashboard, click an indicator. In the Properties pane, the Object section appears.
2. In the Zoom (%) group, set the width and height that you want to use for the magnified indicator.
3. In the Options group, make sure that Show toolbar and border is selected.
4. Click to save the setting.
5. To make sure the zoom setting is appropriate, click . The Preview window appears.
6. On the title bar of the affected indicator, click . The indicator expands to its zoom setting.
7. To adjust the zoom setting, click Close in the Preview window to return to the dashboard workspace. Change the settings in the Zoom (%) group and then preview the dashboard again.

Disable Zoom

To disable zoom in an indicator, complete the following steps:

1. In an open dashboard, select an indicator. In the Properties pane, the Object section appears.
2. In the Zoom (%) group, set the width and height to 100.
3. Click to save the setting.
Adding Indicators with an Interactive Slider

SAS BI Dashboard provides indicator types that include an interactive slider. The interactive slider enables the user to view how a data set varies over time. For information about creating an indicator, see “Create an Indicator” on page 74. For detailed information about the indicator type, see its entry in the indicator dictionary.

The following indicator types provide an interactive slider:

• chart with slider prompt (See “Chart with Slider Prompt” on page 150.)
• interactive summary and bar chart (See “Interactive Summary and Bar Chart” on page 172.)
• interactive summary and scatter plot (See “Interactive Summary and Scatter Plot” on page 178.)
• interactive summary and targeted bar chart (See “Interactive Summary and Targeted Bar Chart” on page 184.)
Chapter 13
Customizing Alerts

Overview
Dashboard designers can customize indicator features in the following ways:

• create indicator alerts for a user or groups of users
• enable a user to create personalized indicator alerts

Note:

• You can define alerts only for indicators that you have associated with a range. For information, see “Indicator Types That Support Ranges” on page 67.
• In SAS BI Dashboard 4.4, the only available personalized user setting is for enabling personalized alerts.

Understanding Alerts

The Alert Definition

When you define an alert, you specify the circumstance that causes that alert to occur. This circumstance is the trigger. To define the trigger, you must make the following selections:
How Alerts Are Triggered

An alert is triggered in the following way:

1. SAS BI Dashboard checks for a change in the indicator data, updates to the indicator alert definition, or both. By default, this check happens every 3 minutes. A SAS BI Dashboard administrator can change this setting.

2. If the percentage of data points in the interval has changed, the alert criteria are evaluated.

3. If the criteria are met, an alert is triggered and a notification is sent to the subscriber.

*Note:* If the alert criteria are met at the time that you create the alert, the alert is triggered immediately. Afterwards, the alert is triggered only when the data changes and the alert criteria are met.

When alert criteria are evaluated, it is evaluated by subscriber. If a subscriber has multiple alerts, each alert is evaluated for that subscriber before proceeding to the next subscriber. Therefore, if there are a number of subscribers for the same alert, it is possible for one subscriber to receive the alert notification later than another subscriber. The lapse in time might even cause the alert to be evaluated differently. However, a group with multiple members is treated as one subscriber. Therefore, it is more efficient to setup an alert for a group subscriber, than to add multiple subscribers individually to an alert.

Alert Criteria and Data Aggregation

If an indicator can aggregate data, it is important to understand that the percentage that is used by alerting is calculated by evaluating the underlying indicator data to determine the number of data points in the interval. The software does not evaluate the aggregated results presented in the graph view. For example, if a bar chart has three bars, each bar can represent an average of multiple data points. A given bar might fall within the alert interval. However, it is possible that none of the individual data points associated with that bar fall in the same interval. In this case, the three bars reflect the aggregated data, not the data points used in the alert calculation.

The following indicators support alerts and can aggregate data:

- bar chart with bullet
- bar chart with reference lines
- interactive summary and bar chart
- interactive summary and targeted bar chart
- targeted bar chart
- tile chart
- waterfall chart
Changes That Can Affect Alert Calculations

In addition to underlying data changes, updates to any of the following indicator components can affect the interval percentage calculation and cause the alert to be reevaluated:

- If the indicator source data is changed, the data available for evaluation can change. For example, if you update the filters defined in an information map, the new filter definition can cause a change in the number of data points that are evaluated.

- If the indicator data definition is changed, the data available for evaluation can change. The following changes are examples of what can cause the data that is evaluated to change:
  - updating the indicator data definition to modify an SQL query
  - changing the selected items for an information map
  - updating the Group by criteria for a table

- If the range is changed, the calculated percentage can change. For example, if you change the upper limit of the range from 100 to 200, the percentage of data points that exist in the range and in its intervals can change.

- If the indicator definition is changed, the data values that are evaluated can change. For example, if you change the Y-axis value setting from Height to Weight, the data that is evaluated is changed.

Working with Alerts for Another User or a Group of Users

Overview

Dashboard designers can create alerts for another user or for a group of users. Business users cannot create or edit these alerts.

Tip: The alert definition is saved in the indicator definition file. When setting up alerts for other users, make sure that the indicator definition file is saved in a location that all affected subscribers can access. For example, if you save an indicator definition file to a specific user’s My Folder location, the file is not visible to other subscribers. The alerts might not function as expected.

Create an Indicator Alert

When you create an indicator alert, you must specify the trigger interval. The trigger interval relies on a range. Therefore, you can create an indicator alert only for indicator types that include a range. For more information, see “Indicator Types That Support Ranges” on page 67.

To create an indicator alert, complete the following steps:

1. In the SAS BI Dashboard designer, open an indicator for which you want to create an alert.
2. Click at the top of the Properties pane. The Create Indicator Alerts window appears.

3. In the **Alert name** field, type the name of the alert.

4. From the **Gauge definition** list, select the range to evaluate.
   
   *Note:* Most indicators use only one range and this setting defaults to that range. However, the following indicators use two ranges. Therefore, you must select the range to evaluate:
   
   - interactive summary and scatter plot
   - range map

5. From the **Trigger interval** list, select the interval in which the value must occur to trigger the alert.

6. Specify how many values (that is, data points or gauges) must be in the selected interval to trigger the alert:
   
   - **Any gauge is in the interval**
   - **% of gauges are in the interval**
   
   *Note:* If you select this setting, type a value in the field next to the check box.

7. Select the delivery method for the alert: **Alerts portlet** or **E-mail subscribers**.
Note:

- You can select both methods.

- **Alerts portlet** assumes that the recipient has an Alerts portlet defined in the SAS Information Delivery Portal. If there is not an Alerts portlet, the alerts remain saved on the server. If a user adds an Alerts portlet to the portal, all previous alerts appear in the Alerts portlet.

- The business user's e-mail address must be available from SAS metadata. For more information, see the *SAS Management Console: Guide to Users and Permissions*.

8. (Optional) If you selected **E-mail subscribers**, complete the following steps:

a. From the **E-mail template** list, select the template to use for e-mail notifications of alerts.

<table>
<thead>
<tr>
<th>Template Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Link only     | The e-mail includes a link that opens the affected indicator in the SAS BI Dashboard viewer.  
*Note:* All indicator types support this template. |
| Default       | The e-mail includes an image of the affected indicator and a link that opens the indicator in the SAS BI Dashboard viewer.  
*Note:* The following indicator types support this template:  
• bar chart with reference lines  
• KPI  
• line chart with reference lines  
• range map  
• scatter plot  
• targeted bar chart |

b. In the **Subject** field, type the subject. Type any additional message to include in the e-mail in the **Add a message to the e-mail** field.

c. To select users and user groups, click next to the list of alert subscribers. The Add Users and Groups window appears.
d. Type the text to search for in the Search field.
   
   Note: Partial text is valid. The wildcard value * is supported.

e. Select the category (Users, Groups, or both) to search.

f. Click Search. A table appears with all entries that match the search criteria.

g. From the table, select the check box next to each entry that you want to add.
   
   Note: You can also drag an entry from the table into the List of alert subscribers.

h. To remove a subscriber, select a user from the list and click X.

i. Click OK to close the Add Users and Groups window.

9. To limit the number of alerts, select Limit alerts sent for frequently changing indicators, type a value in the field, and then select a time interval from the list next to the field.

   TIP Depending on the size of your window, you might have to scroll down the left pane to view this selection.

10. Click Save Alert. The alert appears in the Alerts table.

11. If you want to create another alert, click New Alert. To exit the Create Indicator Alerts window, click OK.

12. In the indicator workspace, click to save the changes to the alert definition in the indicator.

   Note: If the alert criteria are met at the time that you create the alert, the alert is triggered immediately. Afterwards, the alert is triggered only when the data changes and the alert criteria are met.
Edit an Indicator Alert

To edit an indicator alert, complete the following steps:

1. In SAS BI Dashboard designer, open the indicator with the alerts that you want to edit.
2. Click 📋 at the top of the Properties pane. The Manage Indicator Alerts window appears.
   
   **Note:** When the Manage Indicator Alerts window appears, the first alert in the Alerts table is automatically highlighted and its properties appear in the left side of the window.

3. In the Alerts table, select an alert. The properties of the alert appear in the left side of the window.
4. Edit the properties as described in “Create an Indicator Alert” on page 121.
5. Click Save Alert.
6. Click OK to exit the Manage Indicator Alerts window.
7. In the indicator workspace, click 📋 to save the changes to the alert definition in the indicator.

   **Note:** If the edit causes a change in the calculated interval percentage since the percentage was last evaluated and the alert criteria are still met, the alert is triggered.

Delete an Indicator Alert

To delete an alert, complete the following steps:

1. In the Manage Indicator Alerts window, select an alert from the Alerts table.
2. Click ✗.
3. Click OK to exit the Manage Indicator Alerts window.
4. In the indicator workspace, click 📋 to save the changes to the alert definition in the indicator.

Enable Personalized Indicator Alerts

Dashboard designers can enable a business user to create and edit a personal indicator alert. A personal indicator alert is sent only to the user that created the alert. Personal indicator alerts are sent in addition to any alerts that are created for an indicator by a dashboard designer.

To enable a user to create personalized indicator alerts, complete the following steps:

1. In the SAS BI Dashboard designer, open the indicator for which you want to enable alerts.
2. In the Properties pane, expand the Personalized User Settings section at the bottom of the pane.
3. Select **Manage alerts**.

4. Select **Limit selectable e-mail templates** if you want to customize the templates that a business user can select to use for e-mail notifications of alerts.

<table>
<thead>
<tr>
<th>Template Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Link only     | The e-mail includes a link that opens the affected indicator in the SAS BI Dashboard viewer.  
  *Note:* All indicator types support this template. |
| Default       | The e-mail includes an image of the affected indicator and a link that opens the indicator in the SAS BI Dashboard viewer.  
  *Note:* The following indicator types support this template:  
  - bar chart with reference lines  
  - KPI  
  - line chart with reference lines  
  - range map  
  - scatter plot  
  - targeted bar chart |

5. Click ▼ to save the indicator.

In the dashboard viewer, the **Personalize Alerts** selection appears in the ▼ menu.
Overview

You can test dashboards in the following ways:

- by using the Preview Dashboard feature in the SAS BI Dashboard designer
- by viewing the dashboard in the SAS BI Dashboard viewer
- by viewing the dashboard in the SAS BI Dashboard portlet

Test a Dashboard by Using Preview Dashboard

*Note:* Preview dashboard does not support testing of the following functionality:

- links
- alerts
- comments

To test a dashboard by using the preview feature, complete the following steps:

1. Open a dashboard in the SAS BI Dashboard designer.
2. From the toolbar, click ![Preview Dashboard icon](image). The Preview Dashboard window appears.
3. When you are satisfied with the preview, click **Close**.

   *Note:* The **Close** button is in the lower right corner of the Preview window.
Test a Dashboard by Using the SAS BI Dashboard Viewer

To test a dashboard by using the SAS BI Dashboard viewer, click the Dashboard designer toolbar. The SAS BI Dashboard viewer opens and displays the current dashboard. When you are satisfied with the dashboard test, click Manage Dashboards to return to the dashboard designer.

Test a Dashboard by Using the SAS BI Dashboard Portlet

To test a dashboard by using the SAS BI Dashboard portlet, open your portal and navigate to the SAS BI Dashboard portlet. Open the dashboard. When you are satisfied with the dashboard test, click to return to the dashboard designer.
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Appendix 1
Indicator Dictionary

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How to Use This Dictionary

This dictionary describes all of the available indicators provided by SAS BI Dashboard. The indicators are listed in alphabetical order, but a table that cross references the indicator by category is also provided.

Each indicator entry in the dictionary provides the following information:

• a definition and an example figure. The example figure also illustrates sample display settings and indicator data for the indicator.

• usage information that describes what data the indicator is suited and not suited for. The information also lists whether the indicator supports data aggregation, ranges, alerts, links, and interactions.

• information about general settings and how to change the settings.

• a description of each available display setting. Example display settings for the example figure are provided as a way to show how the settings affect the way the indicator is displayed.

• a sample of the indicator data structure for the example figure. This information is provided as a way to show what indicator data is required for use with the indicator. Any specific information about the indicator data requirements is also provided.
## Indicator Types by Category

<table>
<thead>
<tr>
<th>Category</th>
<th>Indicator Type</th>
<th>Icon</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamic gauges</td>
<td>Dynamic bullet bar</td>
<td><img src="image1" alt="Icon" /></td>
<td>These gauges are subtypes of the KPI indicator type. See “KPI (Key Performance Indicator)” on page 189.</td>
</tr>
<tr>
<td></td>
<td>Dynamic dial</td>
<td><img src="image2" alt="Icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dynamic slider</td>
<td><img src="image3" alt="Icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dynamic speedometer</td>
<td><img src="image4" alt="Icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dynamic thermometer</td>
<td><img src="image5" alt="Icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dynamic traffic light</td>
<td><img src="image6" alt="Icon" /></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Indicator Type</td>
<td>Icon</td>
<td>Page</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------</td>
<td>------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Dials</td>
<td>Gauge</td>
<td>![Gauge Icon]</td>
<td>These gauges are subtypes of the KPI indicator type. See “KPI (Key Performance Indicator)” on page 189.</td>
</tr>
<tr>
<td></td>
<td>Simple tachometer</td>
<td>![Simple Tachometer Icon]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Solid tachometer</td>
<td>![Solid Tachometer Icon]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reversed tachometer</td>
<td>![Reversed Tachometer Icon]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Stylized tachometer</td>
<td>![Stylized Tachometer Icon]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Stylized highlighted tachometer</td>
<td>![Stylized Highlighted Tachometer Icon]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dynamic dial</td>
<td>![Dynamic Dial Icon]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dynamic speedometer</td>
<td>![Dynamic Speedometer Icon]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Simple dial</td>
<td>![Simple Dial Icon]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Marked dial</td>
<td>![Marked Dial Icon]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Radial thermometer</td>
<td>![Radial Thermometer Icon]</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Indicator Type</td>
<td>Icon</td>
<td>Page</td>
</tr>
<tr>
<td>------------</td>
<td>------------------------</td>
<td>------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sliders</td>
<td>Dynamic slider</td>
<td><img src="image" alt="Dynamic slider icon" /></td>
<td>These gauges are subtypes of the KPI indicator type. See “KPI (Key Performance Indicator)” on page 189.</td>
</tr>
<tr>
<td></td>
<td>Stylized slider</td>
<td><img src="image" alt="Stylized slider icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vertical slider</td>
<td><img src="image" alt="Vertical slider icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Slider</td>
<td><img src="image" alt="Slider icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Curved slider</td>
<td><img src="image" alt="Curved slider icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cylinder</td>
<td><img src="image" alt="Cylinder icon" /></td>
<td></td>
</tr>
<tr>
<td>Traffic Lights</td>
<td>Dynamic traffic light</td>
<td><img src="image" alt="Dynamic traffic light icon" /></td>
<td>These gauges are subtypes of the KPI indicator type. See “KPI (Key Performance Indicator)” on page 189.</td>
</tr>
<tr>
<td></td>
<td>Traffic light</td>
<td><img src="image" alt="Traffic light icon" /></td>
<td></td>
</tr>
<tr>
<td>Indicators</td>
<td>Pointers</td>
<td><img src="image" alt="Pointers icon" /></td>
<td>These gauges are subtypes of the KPI indicator type. See “KPI (Key Performance Indicator)” on page 189.</td>
</tr>
<tr>
<td></td>
<td>Arrows</td>
<td><img src="image" alt="Arrows icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Simple arrows</td>
<td><img src="image" alt="Simple arrows icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fancy arrows</td>
<td><img src="image" alt="Fancy arrows icon" /></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Button</td>
<td><img src="image" alt="Button icon" /></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Indicator Type</td>
<td>Icon</td>
<td>Page</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------</td>
<td>------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Gauged Graphs</td>
<td>Bar chart with reference lines</td>
<td><img src="image" alt="Bar Chart" /></td>
<td>See “Bar Chart with Reference Lines” on page 143.</td>
</tr>
<tr>
<td></td>
<td>Targeted bar chart</td>
<td><img src="image" alt="Targeted Bar Chart" /></td>
<td>See “Targeted Bar Chart” on page 240.</td>
</tr>
<tr>
<td></td>
<td>Line chart with reference lines</td>
<td><img src="image" alt="Line Chart" /></td>
<td>See “Line Chart with Reference Lines” on page 196.</td>
</tr>
<tr>
<td></td>
<td>Scatter plot</td>
<td><img src="image" alt="Scatter Plot" /></td>
<td>See “Scatter Plot” on page 216.</td>
</tr>
<tr>
<td></td>
<td>Scatter histogram</td>
<td><img src="image" alt="Scatter Histogram" /></td>
<td>See “Scatter Histogram” on page 213.</td>
</tr>
<tr>
<td></td>
<td>Custom graph</td>
<td><img src="image" alt="Custom Graph" /></td>
<td>See “Custom Graph” on page 156.</td>
</tr>
<tr>
<td>Range Map</td>
<td>Range map</td>
<td><img src="image" alt="Range Map" /></td>
<td>See “Range Map” on page 209.</td>
</tr>
<tr>
<td></td>
<td>Tree map (formerly tile chart)</td>
<td><img src="image" alt="Tree Map" /></td>
<td>See “Tile Chart” on page 243.</td>
</tr>
<tr>
<td>Category</td>
<td>Indicator Type</td>
<td>Icon</td>
<td>Page</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------</td>
<td>------</td>
<td>-------------------------------------------</td>
</tr>
<tr>
<td>Charts and Plots</td>
<td>Simple bar chart</td>
<td><img src="image" alt="Simple Bar Chart Icon" /></td>
<td>See “Simple Bar Chart” on page 223.</td>
</tr>
<tr>
<td></td>
<td>Stacked bar chart</td>
<td><img src="image" alt="Stacked Bar Chart Icon" /></td>
<td>See “Stacked Bar Chart” on page 232.</td>
</tr>
<tr>
<td></td>
<td>Stacked bar and line chart</td>
<td><img src="image" alt="Stacked Bar and Line Chart Icon" /></td>
<td>See “Stacked Bar and Line Chart” on page 235.</td>
</tr>
<tr>
<td></td>
<td>Bar chart with bullet</td>
<td><img src="image" alt="Bar Chart with Bullet Icon" /></td>
<td>See “Bar Chart with Bullet” on page 139.</td>
</tr>
<tr>
<td></td>
<td>Clustered bar chart</td>
<td><img src="image" alt="Clustered Bar Chart Icon" /></td>
<td>See “Clustered Bar Chart” on page 152.</td>
</tr>
<tr>
<td></td>
<td>Line chart with reference lines</td>
<td><img src="image" alt="Line Chart with Reference Lines Icon" /></td>
<td>See “Line Chart with Reference Lines” on page 196.</td>
</tr>
<tr>
<td></td>
<td>Dual line chart</td>
<td><img src="image" alt="Dual Line Chart Icon" /></td>
<td>See “Dual Line Chart” on page 160.</td>
</tr>
<tr>
<td></td>
<td>Multi-line chart</td>
<td><img src="image" alt="Multi-Line Chart Icon" /></td>
<td>See “Multi-Line Chart” on page 200.</td>
</tr>
<tr>
<td></td>
<td>Forecast chart</td>
<td><img src="image" alt="Forecast Chart Icon" /></td>
<td>See “Forecast Chart” on page 169.</td>
</tr>
<tr>
<td></td>
<td>Bubble plot</td>
<td><img src="image" alt="Bubble Plot Icon" /></td>
<td>See “Bubble Plot” on page 146.</td>
</tr>
<tr>
<td></td>
<td>Needle plot</td>
<td><img src="image" alt="Needle Plot Icon" /></td>
<td>See “Needle Plot” on page 203.</td>
</tr>
<tr>
<td></td>
<td>Pie chart</td>
<td><img src="image" alt="Pie Chart Icon" /></td>
<td>See “Pie Chart” on page 207.</td>
</tr>
<tr>
<td>Category</td>
<td>Indicator Type</td>
<td>Icon</td>
<td>Page</td>
</tr>
<tr>
<td>----------</td>
<td>----------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Charts and Plots (continued)</td>
<td>Spark table</td>
<td><img src="image" alt="Spark Table Icon" /></td>
<td>See “Spark Table” on page 227.</td>
</tr>
<tr>
<td></td>
<td>Schedule chart</td>
<td><img src="image" alt="Schedule Chart Icon" /></td>
<td>See “Schedule Chart” on page 220.</td>
</tr>
<tr>
<td></td>
<td>Vector plot</td>
<td><img src="image" alt="Vector Plot Icon" /></td>
<td>See “Vector Plot” on page 246.</td>
</tr>
<tr>
<td></td>
<td>Waterfall chart</td>
<td><img src="image" alt="Waterfall Chart Icon" /></td>
<td>See “Waterfall Chart” on page 250.</td>
</tr>
<tr>
<td>Interactions</td>
<td>Dynamic prompt</td>
<td><img src="image" alt="Dynamic Prompt Icon" /></td>
<td>See “Dynamic Prompt” on page 163.</td>
</tr>
<tr>
<td></td>
<td>Dynamic text</td>
<td><img src="image" alt="Dynamic Text Icon" /></td>
<td>See “Dynamic Text” on page 166.</td>
</tr>
<tr>
<td></td>
<td>Chart with slider prompt</td>
<td><img src="image" alt="Chart with Slider Prompt Icon" /></td>
<td>See “Chart with Slider Prompt” on page 150.</td>
</tr>
<tr>
<td></td>
<td>Interactive summary with bar chart</td>
<td><img src="image" alt="Interactive Summary and Bar Chart Icon" /></td>
<td>See “Interactive Summary and Bar Chart” on page 172.</td>
</tr>
<tr>
<td></td>
<td>Interactive summary with scatter plot</td>
<td><img src="image" alt="Interactive Summary and Scatter Plot Icon" /></td>
<td>See “Interactive Summary and Scatter Plot” on page 178.</td>
</tr>
<tr>
<td></td>
<td>Interactive summary with targeted bar chart</td>
<td><img src="image" alt="Interactive Summary and Targeted Bar Chart Icon" /></td>
<td>See “Interactive Summary and Targeted Bar Chart” on page 184.</td>
</tr>
</tbody>
</table>
Bar Chart with Bullet

**Definition**

A bar chart with bullet consists of a grid and some vertical or horizontal columns (bars) with bullet lines inside each bar. The length of each bar represents a quantitative measure, and the bullet inside it compares this measure to another measure, such as a target. The bar and its bullet enables the business user to quickly see how the bullet measure compares to the value of the bar.

**Figure A1.1  Example of a Bar Chart with Bullet Indicator**

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

**Usage Information**

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>Use bar charts with bullets when comparing a primary measure to another measure. For example, bar charts with bullets work well when comparing sales revenue to targets or the current temperature to average or high temperatures.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not suited for</td>
<td>Do not use bar charts with bullets when comparing two measures that cannot be compared easily or are not related to each other.</td>
</tr>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret.</td>
</tr>
</tbody>
</table>
Data aggregation support
This indicator type averages the applicable indicator data.

Range support
A range is required.

Alert support
Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.

Link support
This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support
- Data filter support: This indicator type can be used as either a source or target indicator.
- Interactive highlighting support: This indicator type can be used as either a source or target indicator.
For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support
Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range value</td>
<td>Sale Amount</td>
</tr>
<tr>
<td>X-axis value</td>
<td>Category</td>
</tr>
<tr>
<td>Bar value</td>
<td>Target Sale Amount</td>
</tr>
<tr>
<td>Bullet value</td>
<td>Sale Amount</td>
</tr>
</tbody>
</table>
You can customize the following display settings for this indicator:

- **(Required) From the** Range value **list, select the value to which you want to apply the defined range intervals.**

- **(Required) From the** X-axis value **list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the X-axis value list are all of the values in the Column Name column.**

  *Note:* This setting affects the colors of the bullet bars that are drawn in the indicator.

- **(Required) From the** Bar value **list, select the value that you want to use for the bars that are drawn in the indicator.**

  *Note:* This setting affects the light blue, wide bar in the indicator. The color cannot be changed.

- **(Required) From the** Bullet value **list, select the value that you want to use for the bullets that are drawn in the indicator.**

  *Note:* This setting affects the thin bar that responds to the defined range colors.

- **In the** X-axis title **field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the X-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale X axis, a measurement label is added to the title.**

- **In the** Y-axis title **field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the Bar value list is used by default. If you do not want a title, type a space in the field. If you select Scale Y axis, a measurement label is added to the title.**

- **Select Scale X axis if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select Scale X axis, the X-axis title is displayed as Revenue (millions).**

- **Select Scale Y axis if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select Scale Y axis, the Y-axis title is displayed as Revenue (millions).**

- **Select Hide axis tick labels if you want to hide the axis tick labels when a user zooms out the view of an indicator. When the user zooms in, the axis tick labels reappear. Select this setting to avoid visual clutter when the view is zoomed out.**
• Select **Hide axes when zoomed out** if you want to hide the axes when a user zooms out the view of an indicator. When the user zooms in, the axes reappear. Select this setting to avoid visual clutter when the view is zoomed out.

• Select **Horizontal** if you want to change the orientation of the bars and labels from vertical to horizontal. This option is particularly useful if you have long labels that are difficult to read when they are displayed vertically.

• From the **Row group by** list, select the value that you want to use to group rows of data. If you do not want to group the rows, select (none).

• From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select (none).

• From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

• From the **Y-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

• From the **X-axis labels** list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.

---

**Sample Data Structure**

To create a bar chart with bullet, you must provide one variable (X-axis value) and at least two measures (bar value and bullet value). In this example, only two measures are provided.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Category (X-axis value)</th>
<th>Sale Amount (Bar value)</th>
<th>Target Sale Amount (Bullet value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caramels</td>
<td>$625,601</td>
<td>$1,862,471</td>
</tr>
<tr>
<td>Chocolate Bars</td>
<td>$6,988,757</td>
<td>$6,544,357</td>
</tr>
<tr>
<td>Sugar Free</td>
<td>$1,133,940</td>
<td>$1,770,507</td>
</tr>
<tr>
<td>Truffles</td>
<td>$2,230,216</td>
<td>$2,666,718</td>
</tr>
</tbody>
</table>
Bar Chart with Reference Lines

Definition

A bar chart with reference lines consists of a grid and some vertical or horizontal columns (bars). Each column represents quantitative data. Moreover, reference lines are drawn to emphasize specific data values on the chart.

Figure A1.2  Example of a Bar Chart with Reference Lines Indicator

![Profit per Product Line](image)

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>If you want to display the average interval in a graph, the bar chart with reference lines is the easiest method to use. The tooltip for each data series indicates that the displayed value is the average interval.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. The reference lines especially help users to easily determine which interval the values are in and quickly get an idea of the value's distance from the interval thresholds.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type averages the applicable indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>A range is required.</td>
</tr>
<tr>
<td>Alert support</td>
<td>Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.</td>
</tr>
</tbody>
</table>
Link support
This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support
- **Data filter support**: This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support
Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

**General Settings**

The General Settings section provides controls that support the following tasks:
- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Product_Line</td>
</tr>
<tr>
<td>Bar value</td>
<td>Profit</td>
</tr>
<tr>
<td>X-axis title</td>
<td>Set to Product Line</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>&lt;blank&gt; (defaults to Profit)</td>
</tr>
<tr>
<td>Note: The Scale Y axis setting adds the label (thousands) to the title.</td>
<td></td>
</tr>
<tr>
<td>Scale Y axis</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>Y-axis format</td>
<td>$123,456 is selected.</td>
</tr>
</tbody>
</table>
You can customize the following display settings for this indicator:

- **(Required)** From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

- **(Required)** From the **Bar value** list, select the value that you want to use for the bars that are drawn in the indicator.

- In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

- In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

- Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select **Scale X axis**, the X-axis title is displayed as Revenue (millions).

- Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select **Scale Y axis**, the Y-axis title is displayed as Revenue (millions).

- Select **Hide axis tick labels** if you want to hide the axis tick labels when a user zooms out the view of an indicator. When the user zooms in, the axis tick labels reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- Select **Hide axes when zoomed out** if you want to hide the axes when a user zooms out the view of an indicator. When the user zooms in, the axes reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- Click **Hide reference lines** if you want to hide the reference lines when a user zooms out the view of an indicator. When the user zooms in, the reference lines reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- Select **Horizontal** if you want to change the orientation of the bars and labels from vertical to horizontal. This option is particularly useful if you have long labels that are difficult to read when they are displayed vertically.

- From the **Row group by** list, select the value that you want to use to group rows of data. If you do not want to group the rows, select **(none)**.

- From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select **(none)**.

- From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

- From the **Y-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.
From the X-axis labels list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.

**Sample Data Structure**

To create a bar chart with reference lines, you must provide a variable (X-axis value) and a measure (bar value). Optionally, you can specify additional variables by using the Row group by and Column group by lists.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Product Line (X-axis value)</th>
<th>Profit (Bar value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children</td>
<td>4,123</td>
</tr>
<tr>
<td>Clothes &amp; Shoes</td>
<td>9,947</td>
</tr>
<tr>
<td>Outdoors</td>
<td>5,010</td>
</tr>
<tr>
<td>Sports</td>
<td>15,213</td>
</tr>
</tbody>
</table>

*Note:* To prevent aggregation by the bar chart with reference lines indicator, aggregate the data at the indicator data level.

For the best results, the indicator data should return only one value for each unique value in the Category Label data column. If the indicator data returns only one value, the bar chart with reference lines indicator does not need to aggregate the data. The category variable is specified by the data column selected for the Category Label field when the data source is defined.

If the bar chart with reference lines indicator does aggregate data, the bar chart with reference lines does two things:

1. It displays data points at the average interval for each data series.
2. It averages the indexes of the aggregated intervals to determine the interval to display and the color of the bar.

---

**Bubble Plot**

**Definition**

A bubble plot is a chart that consists of a set of data points that are plotted to show the relation of one value against another. Each data point in the plot is a bubble that is sized to indicate how a third variable is affected by the correlation.
Usage Information

Data best suited for
You can use the diameters of the bubbles to represent company size, the X axis to represent company growth, and the Y axis to represent current company revenue. You can use transparent bubbles when some bubbles overlap and all bubbles need to be visible. Use colored bubbles to group similar bubbles together.

Target audience
This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. However, it is essential to provide a clear and easy-to-read legend with a bubble plot so that the user can interpret what the different dimensions (bubble placement, size, and color) mean.

Data aggregation support
This indicator type does not aggregate the indicator data.

Range support
Ranges are not supported.

Alert support
Alerts are not supported.

Link support
This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.
Interaction support

- **Data filter support:** This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support:** This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

General Settings

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group by value</td>
<td>Product Category</td>
</tr>
<tr>
<td>X-axis value</td>
<td>Avg Price per Unit</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Revenue</td>
</tr>
<tr>
<td>Bubble size value</td>
<td>Profit %</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to <em>Avg Price per Unit</em>)</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>&lt;blank&gt; (defaults to <em>Revenue</em>)</td>
</tr>
</tbody>
</table>

*Note:* The *Scale Y axis* setting adds the label *(millions)* to the title.

You can customize the following display settings for this indicator:
(Required) From the **Group by value** list, select the value that you want to use to group the data that is displayed in the indicator.

(Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

(Required) From the **Y-axis value** list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **Y-axis value** list are all of the values in the **Column Name** column.

(Required) From the **Bubble size value** list, select the value that you want to use for the size of the bubbles that are drawn in the indicator.

In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to **Revenue** and you select **Scale X axis**, the X-axis title is displayed as **Revenue (millions)**.

Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to **Revenue** and you select **Scale Y axis**, the Y-axis title is displayed as **Revenue (millions)**.

From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

From the **Y-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

### Sample Data Structure

To create a bubble plot, you must provide a variable (group by value) and three measures (X-axis value, Y-axis value, bubble size value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Product Category (Group by value)</th>
<th>Average Price Per Unit (X-axis value)</th>
<th>Revenue (Y-axis value)</th>
<th>Profit % (Bubble size value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Golf</td>
<td>$109.38</td>
<td>$8,040,846</td>
<td>54.06%</td>
</tr>
<tr>
<td>Product Category (Group by value)</td>
<td>Average Price Per Unit (X-axis value)</td>
<td>Revenue (Y-axis value)</td>
<td>Profit % (Bubble size value)</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------------------------------------</td>
<td>------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Racket sports</td>
<td>$97.81</td>
<td>$4,072,029</td>
<td>60.21%</td>
</tr>
<tr>
<td>Swim sports</td>
<td>$34.59</td>
<td>$1,486,572</td>
<td>57.81</td>
</tr>
</tbody>
</table>

**Chart with Slider Prompt**

**Definition**

A line chart with slider prompt is a graph that consists of a grid and a line with a slider that can be moved across the line. The slider prompt provides a way to see the values of the chart in relation to time, or other values related to specific data points on the chart.

*Figure A1.4 Example of a Chart with Slider Prompt Indicator*

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

**Usage Information**

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>A chart with slider prompt is commonly used when time is a factor that is of relevance. Time values are usually along the horizontal axis. Use a chart with slider prompt when data greatly varies in relation to time and it is necessary for the user of the chart to understand values at specific points in time.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. The ability to choose what time period the chart will show provides value and relevance to the user.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type does not aggregate the indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>Ranges are not supported.</td>
</tr>
</tbody>
</table>
Alert support
Alerts are not supported.

Link support
This indicator type can be used as the destination of a link only. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support
• Data filter support:
  • (For data filtering on local systems) This indicator can be used as either a source or target indicator.
  • (For data filtering on remote servers) This indicator can be used as a target indicator only.
• Interactive highlighting support: This indicator does not support interactive highlighting.
  For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support
Filtering multiple items is not supported.

General Settings
The General Settings section provides controls that support the following tasks:
• “Specify the Height and Width of the Indicator” on page 75
• “Change the Indicator Type” on page 76
• “Change the Indicator Data to Use” on page 77

Display Settings
The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Date Delivered</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Sales</td>
</tr>
<tr>
<td>X-axis title</td>
<td>Set to Delivery Date</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>Set to Total Sales</td>
</tr>
<tr>
<td>Y-axis format:</td>
<td>$123,456 is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:
• (Required) From the X-axis value list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column.
The selections available in the X-axis value list are all of the values in the Column Name column.

• (Required) From the Y-axis value list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the Y-axis value list are all of the values in the Column Name column.

• Select Hide axis tick labels if you want to hide the axis tick labels when a user zooms out the view of an indicator. When the user zooms in, the axis tick labels reappear. Select this setting to avoid visual clutter when the view is zoomed out.

• Select Hide axes when zoomed out if you want to hide the axes when a user zooms out the view of an indicator. When the user zooms in, the axes reappear. Select this setting to avoid visual clutter when the view is zoomed out.

• From the X-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

• From the Y-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

**Sample Data Structure**

To create a chart with slider prompt, you must provide one variable (X-axis value) and one measure (Y-axis value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Date Delivered</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Delivered</td>
<td></td>
</tr>
<tr>
<td>(X-axis value)</td>
<td>(Y-axis value)</td>
</tr>
<tr>
<td>12/1/2009</td>
<td>4099652.48</td>
</tr>
<tr>
<td>1/1/2010</td>
<td>4099652.48</td>
</tr>
</tbody>
</table>

**Clustered Bar Chart**

**Definition**

A clustered bar chart consists of a grid and some vertical or horizontal columns (bars) that are arranged in groups, or clusters. Each bar represents quantiative data. The bars of each data series are always in the same position in each cluster throughout the chart. Different colors, shares, or patterns typically distinguish each data series.
Figure A1.5  Example of a Clustered Bar Chart Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>Use a clustered bar chart when you want to compare the value of a specific subdimension across multiple dimensions. A bar chart enables you to compare values across a related dimension (time or some other variable). Clustering adds the ability to break down a higher-level trend into more detail across a subdimension (time or some other variable) to provide more relevant information. The subdimensions represent discrete portions of the total, and the value of one subdimension is not related to the value of another subdimension.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type sums the applicable indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>Ranges are not supported.</td>
</tr>
<tr>
<td>Alert support</td>
<td>Alerts are not supported.</td>
</tr>
<tr>
<td>Link support</td>
<td>This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.</td>
</tr>
</tbody>
</table>
Interaction support

- **Data filter support**: This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

---

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Product Line</td>
</tr>
<tr>
<td>Cluster group</td>
<td>Month</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Sales</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Product Line)</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>Set to Revenue</td>
</tr>
</tbody>
</table>

*Note: The Scale Y axis setting adds the label (millions) to the title.*

| Scale Y axis | This setting is selected. |

You can customize the following display settings for this indicator:

- *(Required)* From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.
• (Required) From the Cluster group list, select the value that you want to use to define the cluster in the indicator.

• (Required) From the Y-axis value list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the Y-axis value list are all of the values in the Column Name column.

• In the X-axis title field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the X-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale X axis, a measurement label is added to the title.

• In the Y-axis title field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the Y-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale Y axis, a measurement label is added to the title.

• Select Scale X axis if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select Scale X axis, the X-axis title is displayed as Revenue (millions).

• Select Scale Y axis if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select Scale Y axis, the Y-axis title is displayed as Revenue (millions).

• From the X-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

• From the Y-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

• From the X-axis labels list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.

---

**Sample Data Structure**

To create a clustered bar chart, you must provide two variables (one for the bar and one for the cluster) and one measure.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Product Line (X-axis value)</th>
<th>Month (Cluster group)</th>
<th>Sales (Y-axis value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children</td>
<td>1</td>
<td>$256,803</td>
</tr>
<tr>
<td>Clothes &amp; Shoes</td>
<td>1</td>
<td>$2,762,409</td>
</tr>
<tr>
<td>Outdoors</td>
<td>1</td>
<td>$2,253,080</td>
</tr>
</tbody>
</table>
### Custom Graph

**Definition**

A custom graph is a graph that exists as an image. The information in that image does not have to be a graph, but can be anything represented by an image.

*Figure A1.6 Example of a Custom Graph Indicator That Uses a Stored Process*

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.
Usage Information

You can use this indicator in the following ways:

- by specifying indicator data. When you make this specification, additional settings become available that enable you to select a simple gauge that is displayed with your image. This single gauge reads only the first row of data in the selected indicator data. The gauge applies the range intervals of the specified range to that row of data.

  Note: The gauge might not have any relationship to the image that you specify, and specifying an image is optional.

- without specifying indicator data. You can specify an image for the indicator to display, but there is not an accompanying gauge.

For an example of using this indicator, see “Example: Creating a Custom Graph That Uses a Stored Process” on page 87.

| Data best suited for | The custom graph indicator is a combination of a gauge and an external image that is used by reference in SAS BI Dashboard. You reference the image by specifying a Web address. Custom graphs can be used for a variety of purposes, but are especially useful when a picture is needed to illustrate a result or status. For example, if a company sells a wide variety of similar products, you can display an image of a product next to its sales data. You can also use a stored process with a custom graph indicator to produce a graphical display that is not possible with the SAS BI Dashboard itself. To use a stored process, you must create a stored process that is appropriate for inclusion in a dashboard and then derive the Web address that renders the stored process output. For more information about using stored processes, see “Sample Data Structure” on page 159. |
| Not suited for | Do not use this indicator to display static images. Instead, use the static image component provided by SAS BI Dashboard. For information about static content, see “Linking to Other Information by Adding Static Content” on page 98. |
| Target audience | Some audiences might not be familiar with gauges. However, gauges are not difficult to interpret, so even if a user is unfamiliar with this indicator type, they should be able to understand it. Adding a custom image provides context for the user that might improve understanding. Audiences that might be familiar with this indicator type include business analysts, business users, executives, and financial analysts. |
| Data aggregation support | This indicator type does not aggregate the indicator data. |
| Range support | Ranges are optionally supported.  
  Note: A range is required if you also select indicator data to use with the custom graph indicator. |
| Alert support | Alerts are supported only if a range is associated with the indicator. For information, see Chapter 13, “Customizing Alerts,” on page 119. |
Link support
This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support
- **Data filter support**: This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.
  For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support
Filtering multiple items is not supported.

**General Settings**

The General Settings section provides controls that support the following tasks:
- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

If you click ![Custom Graph Indicator](image) to select the custom graph indicator type and you have specified indicator data, the **Gauge** and **Range** lists appears. From these lists, you can select a gauge subtype and range to use. See Table A1.1 on page 190 for the available subtypes.

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>KPI title</td>
<td>Set to <em>(none)</em>.</td>
</tr>
<tr>
<td>Image Web address</td>
<td><a href="http://sasbi.demo.sas.com:8080/SASStoredProcess/do?_action=form">http://sasbi.demo.sas.com:8080/SASStoredProcess/do?_action=form</a>, properties,execute,notbanner,newwindow&amp;program=%2FOrion+Star%2FSales+Department%2FStored+Processes%2FUSGeoSales_Map</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- From the **Range value** list, select the value to which you want to apply the defined range intervals.
  *Note*: If you do not specify indicator data and a range, this setting is not available.
- From the **KPI title** list, select the value to use as the title for the gauge.
Note: If you do not specify indicator data and a range, this setting is ignored.

- In the **Image Web address** field, type the Web address to use for an image or other information in the indicator. The following image file types are supported: JPG, PNG, and GIF (but not animated GIF). For more information, see “Sample Data Structure” on page 159.

  Note: This field does not support relative pathnames. If you import or export the custom graph indicator as part of a package, you must update the path in this field.

- When you specify an image in the Web address, you have the choice of using a proxy. Click **Use proxy** to specify that a server proxy is used in the indicator.

<table>
<thead>
<tr>
<th>If you use a proxy</th>
<th>The image file must be in the same network domain as the SAS BI Dashboard server.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Note: You can enable Adobe Flash to load images from other domains by creating a cross-domain policy file in the root of the Web server. For more information, search the Adobe Web site for cross-domain policy file specification.</td>
</tr>
<tr>
<td>If you do not use a proxy</td>
<td>The image file must be accessible to the SAS middle tier. Ensure that the SAS middle tier has the correct user credentials to access the Web address.</td>
</tr>
</tbody>
</table>

Note: When using a stored process, select **Use proxy** so that the proxy server detects from the Web address that the target is a stored process request. The proxy server then adds authentication for the current user to the SAS middle tier.

### Sample Data Structure

If you opt to use this indicator with indicator data and a range, the resulting gauge reads only the first row of data provided by the indicator data.

The custom graph indicator type displays an image. The image can be the output of a stored process or other software. For more information about using a stored process, see “Example: Creating a Custom Graph That Uses a Stored Process” on page 87.

Use the following guidelines when using a stored process:

- The output type for the stored process must be set to streaming.
- To determine the Web address for a stored process, use the Stored Process Web application. Open the Properties window and highlight the Web address. Then, press CTRL + C to copy the Web address. **Tip**: While highlighting, you might have to drag the mouse downwards to force the page to scroll and reveal the entire Web address.
- HTML output is not supported. The stored process output must create only an image that is streamed back to the indicator.
- Do not use the %STPBEGIN and %STPEND macros.
- The stored process must write to the reserved fileref _WEBOUT.
• When using a stored process, select **Use proxy** so that the proxy server detects from the Web address that the target is a stored process request. The proxy server then adds authentication for the current user to the SAS middle tier.

### Dual Line Chart

**Definition**

A dual line chart shows two data series, each as a line, on the same chart. A data series shows the relationship of one variable to another, often as movements or trends in the data over a period of time. Line charts summarize source data and typically are used to chart response values against discrete categorical values.

*Figure A1.7  Example of a Dual Line Chart Indicator*

![Dual Line Chart Example](image)

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

**Usage Information**

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>Usage Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use a dual line chart when it is critical to compare multiple values for two different categories at a given point in time or at a given state. It is critical that each line has a different color (which is done automatically) so that the lines can be clearly distinguished if they overlap. The dual line chart is best used when the summarized values for the Y axis are relatively close together, or if the specific value is not as important to view compared to the relative trend. The dual line chart supports no more than two lines.</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Not suited for</th>
<th>Usage Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The dual line chart indicator supports displaying only one Y axis. Do not use this indicator if both lines cannot be represented by one Y axis. Also, it is preferable that the X-axis value be numeric data and not character data.</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Target audience
This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret.

### Data aggregation support
This indicator type does not aggregate the indicator data.

### Range support
Ranges are not supported.

### Alert support
Alerts are not supported.

### Link support
This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

### Interaction support
- **Data filter support**: This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

### Filter multiple items support
Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

---

### General Settings

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Sort Order” on page 78

### Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Month</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Sales</td>
</tr>
<tr>
<td>Second Y-axis value</td>
<td>Profit</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Month)</td>
</tr>
</tbody>
</table>
### Display Setting | Selection Used for Figure
---|---
Y-axis title | Set to Revenue
  
  *Note:* The Scale Y axis setting adds the label *(millions)* to the title.

Scale Y axis | This setting is selected.

You can customize the following display settings for this indicator:

- *(Required)* From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

- *(Required)* From the **Y-axis value** list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **Y-axis value** list are all of the values in the **Column Name** column.

- *(Required)* From the **Second Y-axis value** list, select the value to use for point values that constitute a second line in the line chart.

- In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

- In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

- Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to *Revenue* and you select **Scale X axis**, the X-axis title is displayed as *Revenue (millions)*.

- Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to *Revenue* and you select **Scale Y axis**, the Y-axis title is displayed as *Revenue (millions)*.

- From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select *(none)*. When set to *(none)*, the indicator uses the format that is used in the data source.

- From the **Y-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select *(none)*. When set to *(none)*, the indicator uses the format that is used in the data source.

- From the **X-axis labels** list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.
**Sample Data Structure**

To create a dual line chart, you must provide one variable and two measures (for each line).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Month (X-axis value)</th>
<th>Sales (Y-axis value)</th>
<th>Profit (Second Y-axis value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$9,665,459</td>
<td>$5,183,824</td>
</tr>
<tr>
<td>2</td>
<td>$7,775,815</td>
<td>$4,196,567</td>
</tr>
<tr>
<td>3</td>
<td>$7,014,698</td>
<td>$3,755,988</td>
</tr>
<tr>
<td>4</td>
<td>$10,574,099</td>
<td>$5,515,781</td>
</tr>
<tr>
<td>5</td>
<td>$12,339,657</td>
<td>$6,524,972</td>
</tr>
</tbody>
</table>

**Dynamic Prompt**

**Definition**

A dynamic prompt is a drop-down list (or menu) that consists of selections that can be used to dynamically change another indicator type based on the menu value that is selected.

**Figure A1.8  Example of a Dynamic Prompt Indicator with the Dynamic Radial Thermometer Gauge Selection**

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.
### Usage Information

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Data best suited for</strong></td>
<td>Use dynamic prompts when working with unique menu values for which the data related to each value is different and informative enough by itself. An example of a dynamic prompt is when the following values are included in the prompt: 2005, 2006, 2007, 2008, 2009, 2010. Whenever the user selects one of these years, another indicator dynamically changes based on the selection of the year.</td>
</tr>
<tr>
<td><strong>Target audience</strong></td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. Adding KPI indicators to the values in the list provides users with additional information to help them quickly choose among the options given in the list.</td>
</tr>
<tr>
<td><strong>Data aggregation support</strong></td>
<td>This indicator type does not aggregate the indicator data.</td>
</tr>
<tr>
<td><strong>Range support</strong></td>
<td>Ranges are optionally supported.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> As of the second maintenance release of SAS BI Dashboard 4.31, a range is no longer required when you create a dynamic prompt indicator. However, the range is required if you select the <strong>Combo box with gauge</strong> setting.</td>
</tr>
<tr>
<td><strong>Alert support</strong></td>
<td>Alerts are supported only if a range is associated with the indicator. For information, see Chapter 13, “Customizing Alerts,” on page 119.</td>
</tr>
<tr>
<td><strong>Link support</strong></td>
<td>This indicator type can be used as the destination of a link only. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.</td>
</tr>
<tr>
<td><strong>Interaction support</strong></td>
<td>• <strong>Data filter support:</strong> This indicator can be used as either a source or target indicator.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Interactive highlighting support:</strong> This indicator does not support interactive highlighting.</td>
</tr>
<tr>
<td></td>
<td>For more information, see “Adding Interactions between Indicators” on page 104.</td>
</tr>
<tr>
<td><strong>Filter multiple items support</strong></td>
<td>Filtering multiple items is not supported.</td>
</tr>
</tbody>
</table>

**Note:** The dynamic prompt indicator does not use the SAS Prompting Framework and cannot automatically establish dependencies between prompts to create cascading prompts. To achieve similar behavior you must do the following:

1. Use either an information map or stored process as the indicator data.
2. Manually create the prompts in the information map or stored process.
3. Manually create the filter combinations for each dynamic prompt in the indicator data.
4. Manually define interactions in the dashboard between the prompts. The interactions can be either client-side or server-side, depending on your underlying data needs.
**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range value</td>
<td>Sale Amount</td>
</tr>
<tr>
<td>Range value 2</td>
<td>Sale Amount</td>
</tr>
<tr>
<td>Menu value</td>
<td>Country</td>
</tr>
<tr>
<td>Prompt type</td>
<td>Combo box with gauge</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- From the **Range value** list, select the value to which you want to apply the defined range intervals.

  **Note:** As of the second maintenance release of SAS BI Dashboard 4.31, you no longer must specify a range when you create a dynamic prompt indicator.

- (Required) From the **Menu value** list, select the parameter to provide the values available in the list in a dynamic prompt indicator.

  **CAUTION:**  
  *If you select Combo box with gauge, ensure that each menu value is unique.*  
  Duplicate menu values cause unexpected behavior.

- From the **Prompt type** list, select the type of prompt to display for a dynamic prompt indicator. As of the second maintenance release of SAS BI Dashboard 4.31, the default setting is **Combo box**. For more information, see “Sample Data Structure” on page 166.

  **Note:** If you select **Combo box with gauge**, then you must select a gauge. If you select **Combo box**, then you cannot select a range.

- In the **Prompt label** field, type the label for the prompt.

- From the **Prompt label width** list, select the width to use, in pixels, for the label. The width of the combo box is reduced by the width of the prompt label.
• Click **Include (all) selection** if you want the prompt to provide a selection that displays all values.

**Sample Data Structure**

To create a dynamic prompt that is a list box with a gauge, provide values for the menu selections (menu value) and an associated range value for each menu selection (range value), and select **Combo box with gauge** from the **Prompt type** list. When including a gauge, make sure that the data is aggregated such that there is only one row for each menu value. For example, in the following data sample, you should not have more than one row of data for each country. Otherwise, the menu will display a selection and gauge for each row and a country with multiple rows will appear in the menu multiple times.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Country (Menu value)</th>
<th>Sales Amount (Range value and Range value 2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>$7,334,520</td>
</tr>
<tr>
<td>France</td>
<td>$899,771</td>
</tr>
<tr>
<td>UK</td>
<td>$1,395,636</td>
</tr>
<tr>
<td>United States</td>
<td>$619,852,310</td>
</tr>
</tbody>
</table>

To create a dynamic prompt that is a list box only, provide only menu values and select **Combo box** from the **Prompt type** list. Typically, this type of dynamic prompt is used as a source indicator to interact with another target indicator. The target indicator must include a data column with the same values as those specified for the dynamic prompt menu value. The column names do not have to match. However, the values in the columns must match in order for the dynamic prompt to filter the target indicator. For more information, see “Adding Interactions between Indicators” on page 104.

---

**Dynamic Text**

**Definition**

Dynamic text is text that can vary within a sentence or text-based label.

*Figure A1.9*  
**Example of a Dynamic Text Indicator Shown with an Associated Dynamic Prompt Combo Box**

Sports  

53.55% Profit % for Sports
For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

**Usage Information**

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>The dynamic text is the only value in the text that is not static. Dynamic text can be combined with a range to show the interval color of the range. In the following example of dynamic text, “medium” is the dynamic value: “The current security level is medium”.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret if the dynamic text is given within context, as in the example in the previous paragraph. Dynamic text is useful to users by helping them quickly find a specific value of interest.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type does not aggregate the indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>Ranges are optionally supported.</td>
</tr>
<tr>
<td>Alert support</td>
<td>Alerts are supported only if a range is associated with the indicator. For information, see Chapter 13, “Customizing Alerts,” on page 119.</td>
</tr>
<tr>
<td>Link support</td>
<td>This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.</td>
</tr>
</tbody>
</table>

**Interaction support**

- **Data filter support**: For both local system and remote server data filtering, this indicator can be used as a target indicator only.
- **Interactive highlighting support**: This indicator does not support interactive highlighting.

For more information, see “Adding Interactions between Indicators” on page 104.

| Filter multiple items support | Filtering multiple items is not supported. |

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77
Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Static text</td>
<td>@var1@ Profit % for</td>
</tr>
<tr>
<td>Range</td>
<td>Product Category</td>
</tr>
<tr>
<td>Range data source</td>
<td>Profit %</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) In the Static text field, type the text to display for a dynamic text indicator. The text can be a text string, a column from the data source, or both.

  Note:
  - If you want to display a column from the data in the static text, type @var1@. The range value is applied to the column from the data, and the resulting value replaces the @var1@ string. For an example, see the static text setting in the preceding table.
  - You are not required to include static text in this field. You can include @var1@ only.
  - For each dynamic text indicator, you can include data from only one column in the indicator data source.

- In the Range field, type the filename of a previously saved range, or click Browse and navigate to the file. Select the file and click OK.

  Note: A range is optional. If you select a range, the range value's text is colored based on the range interval colors.

- (Required) From the Range data source list, select the column from the data source to use for the range.

- From the Format list, select the format to apply to the data in a column.

Sample Data Structure

To create a dynamic text indicator, you must provide a data source for the range (range data source) and the text to display (static text).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Product Category (Range)</th>
<th>Profit % (Range data source)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indoor sports</td>
<td>54.06%</td>
</tr>
<tr>
<td>Swim sports</td>
<td>57.81%</td>
</tr>
</tbody>
</table>
A forecast chart is a type of line chart that is designed to show actual and forecasted data over time. Moreover, the forecast chart can show the confidence intervals for the future forecasted values.

Note: The forecasted data and confidence intervals are provided by indicator data that is generated by using SAS Time Series Forecasting. The applicable task is the Basic Forecasting task in the Time Series group.

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Data best suited for A forecast chart can be used when forecasted data is present. Note that the dashboard designer would have to determine a forecasting method and provide this data as a data source in order to display a forecast. Forecasts should have a time frame tied to them so that the business user is aware of how far out the forecasting is available or has been done.

Target audience This indicator type is appropriate for all user audiences. Most people will find this indicator type easy to interpret, especially those with background knowledge of statistics.
Data aggregation support

This indicator type does not aggregate the indicator data.

Range support

Ranges are not supported.

Alert support

Alerts are not supported.

Interaction support

- **Data filter support:** This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support:** This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Link support

This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

---

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Month</td>
</tr>
<tr>
<td>Actual value</td>
<td>ColumnACTUAL</td>
</tr>
<tr>
<td>Forecasted value</td>
<td>ColumnFORECAST</td>
</tr>
<tr>
<td>Lower band</td>
<td>ColumnL95</td>
</tr>
<tr>
<td>Upper band</td>
<td>ColumnU95</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Month)</td>
</tr>
</tbody>
</table>
You can customize the following display settings for this indicator:

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

- (Required) From the **Actual value** list, select the value to use for the actual value in a forecast chart indicator.

- (Required) From the **Forecasted value** list, select the value to use for the forecasted value in a forecast chart.

- (Required) From the **Lower band** list, select the value to use for the lower confidence band in a forecast chart.

- (Required) From the **Upper band** list, select the value to use for the upper confidence band in a forecast chart.

- In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

- In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

- In the **Actual legend label** field, type the text that replaces the default legend label for the actual value in a forecast chart indicator.

- In the **Forecasted legend label** field, type the text that replaces the default legend label for the forecasted value in a forecast chart.

- In the **Band legend label** field, type the text that replaces the default title for the band legend in a forecast chart.

- Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to **Revenue** and you select **Scale X axis**, the X-axis title is displayed as **Revenue (millions)**.

- Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if
the Y-axis title is set to Revenue and you select Scale Y axis, the Y-axis title is displayed as Revenue (millions).

- From the X-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

- From the Y-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

Sample Data Structure

To create a forecast chart, you must provide one variable or measure (X-axis value) and four measures (actual value, forecasted value, lower band, and upper band).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting. Note that this data was generated when 2011 dates were in the future.

<table>
<thead>
<tr>
<th>Month</th>
<th>Actual (Actual value)</th>
<th>Forecast (Forecasted value)</th>
<th>Lower Limit (Lower band)</th>
<th>Upper Limit (Upper band)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/01/2010</td>
<td>$39,482.29</td>
<td>$44,163.35</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/01/2010</td>
<td>$52,031.64</td>
<td>$51,549.97</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/01/2010</td>
<td>$120,083.94</td>
<td>$80,948.36</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01/01/2011</td>
<td>$69,889.80</td>
<td>$17,457.73</td>
<td>$122,321.88</td>
<td></td>
</tr>
<tr>
<td>02/01/2011</td>
<td>$61,965.83</td>
<td>$9,231.34</td>
<td>$114,700.31</td>
<td></td>
</tr>
<tr>
<td>03/01/2011</td>
<td>$36,283.89</td>
<td>($16,767.06)</td>
<td>$89,334.85</td>
<td></td>
</tr>
</tbody>
</table>

Interactive Summary and Bar Chart

Definition

An interactive summary and bar chart is a graph that consists of a grid and some vertical or horizontal columns (bars) with a slider that can be moved across the bars.

An interactive display enables dashboard users to interactively traverse large amounts of detail data by sliding along a summary chart. Detail data can be easily compared using the following two methods:

- When the display is defined, the dashboard designer selects a column by which to group data.
- While viewing the display, the business user can select different detail slices to compare.
Note: This indicator can show actual and forecasted data over time. Additionally, it can show the confidence intervals for the future forecasted values. These values are provided by indicator data that is generated using SAS Time Series Forecasting.

Figure A1.11  Example of an Interactive Summary and Bar Chart Indicator

Interactive Summary and Bar Chart

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

Note: SAS BI Dashboard 4.3 and later provides this indicator for support of environments that have been migrated from SAS BI Dashboard 4.2. It is not recommended that users of SAS BI Dashboard 4.3 or later use this indicator. Instead, use the chart with slider prompt indicator and either bar chart indicators, and define an interaction between the two indicators to achieve the same functionality, but with superior control by way of the display settings.

• For more information, see “Adding Interactions between Indicators” on page 104.
• See “Bar Chart with Bullet” on page 139.
• See “Bar Chart with Reference Lines” on page 143.
• See “Chart with Slider Prompt” on page 150.
### Data best suited for
An interactive summary and bar chart is most commonly used when data greatly varies across time and multiple categories can be defined (to represent the different bars). This chart can also be used with ranges by representing the length of each bar as the progress made toward a certain range value. Because the interactive summary and bar chart has many components, be sure to identify what role each value or data point plays in the chart and think about how to display the value or data point.

### Not suited for
The indicator data must be suitable for a bar chart. Indicator data that returns a single row and that is suitable for a KPI indicator is not suitable for this indicator.

### Target audience
This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. The ability to choose the time period that is displayed by the chart provides value and relevance to the user.

### Data aggregation support
This indicator type averages the applicable indicator data.

*Note:* The detail bar chart always averages the data. However, you can select the aggregation method to use when summarizing data for the summary chart in the indicator. The default selection is **Sum**.

### Range support
A range is required.

### Alert support
Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.

### Link support
This indicator type can be used to define a link only. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

### Interaction support
- **Data filter support:** This indicator does not support data filtering.
- **Interactive highlighting support:** This indicator does not support interactive highlighting.
  
  For more information, see “Adding Interactions between Indicators” on page 104.

### Filter multiple items support
Filtering multiple items is not supported.

---

### General Settings
The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77

*Note:* When setting the height and width of this indicator type, remember that it has minimum legible dimensions of 380 x 450 pixels.
Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Product.Line</td>
</tr>
<tr>
<td>Bar value</td>
<td>ACTUAL</td>
</tr>
<tr>
<td>Forecasted value</td>
<td>FORECAST</td>
</tr>
<tr>
<td>Lower confidence</td>
<td>Lower Limit</td>
</tr>
<tr>
<td>Upper confidence</td>
<td>Upper Limit</td>
</tr>
<tr>
<td>Summarization graph type</td>
<td>Line is selected.</td>
</tr>
<tr>
<td>Summarization function</td>
<td>Sum is selected.</td>
</tr>
<tr>
<td>Default data color</td>
<td>Blue is selected.</td>
</tr>
<tr>
<td>Show legend</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>Summarize by</td>
<td>Delivery Date</td>
</tr>
<tr>
<td>Column group by</td>
<td>Customer_Group</td>
</tr>
<tr>
<td>Detail axis format</td>
<td>$123,456 is selected.</td>
</tr>
<tr>
<td>Summary axis format</td>
<td>$123,456 is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

- (Required) From the **Bar value** list, select the value that you want to use for the bars that are drawn in the indicator.

- (Required) From the **Forecasted value** list, select the value to use for the forecasted value in a forecast chart.

- From the **Lower confidence** list, select the value to use for the lower confidence boundary in an interactive display.

- From the **Upper confidence** list, select the value to use for the upper confidence boundary in an interactive indicator.
From the **Alternate value to summarize** list, select the value to use for the summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

From the **Alternate forecasted value to summarize** list, select the value to use for the forecasted value summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

From the **Alternate lower confidence to summarize** list, select the value to use for the lower confidence summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

From the **Alternate upper confidence to summarize** list, select the value to use for the upper confidence summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

From the **Summarization graph type** list, select the type of graph to use to represent summary data in an interactive indicator.

From the **Summarization function** list, select the function to use to summarize data in an interactive indicator.

In the **Custom label for summary graph** field, type the text to use to replace the default title for the summary graph in an interactive indicator.

From the **Default data color** field, select the default color for representing data in an interactive indicator.

Select **Show legend** to specify that the legend is displayed in the indicator.

(Required) From the **Summarize by** list, select the value to use to summarize data in an interactive indicator.

From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select (none).

From the **Detail axis format** list, select the SAS format to apply to the data on the detail axis.

From the **Summary axis format** list, select the format to apply to the data on the summary axis.

### Sample Data Structure

To create an interactive summary and bar chart, you must provide two variables (X-axis value and summarize by) and at least two measures (bar value, forecasted value). In this example, the data from 2011 also provides values for the optional lower and upper confidence settings.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Region/Country (Column group by)</th>
<th>Product Line (X-axis value)</th>
<th>Delivery Date (Summarize by)</th>
<th>Actual (Bar value)</th>
<th>Forecast (Forecasted value)</th>
<th>Lower Limit (Lower confidence)</th>
<th>Upper Limit (Upper confidence)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia</td>
<td>Children</td>
<td>01/01/2009</td>
<td>$4,454.00</td>
<td>$5,418.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Children</td>
<td>02/01/2009</td>
<td>$3,456.10</td>
<td>$5,418.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Region/Country (Column group by)</td>
<td>Product Line (X-axis value)</td>
<td>Delivery Date (Summarize by)</td>
<td>Actual (Bar value)</td>
<td>Forecast (Forecasted value)</td>
<td>Lower Limit (Lower confidence)</td>
<td>Upper Limit (Upper confidence)</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------</td>
<td>-------------------------------</td>
<td>-------------------</td>
<td>-----------------------------</td>
<td>-------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Asia</td>
<td>Children</td>
<td>01/01/2011</td>
<td>$11,292.68</td>
<td>$4,451.85</td>
<td>$18,141.50</td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>Children</td>
<td>02/01/2011</td>
<td>$10,281.50</td>
<td>$3,349.61</td>
<td>$17,213.39</td>
<td></td>
</tr>
<tr>
<td>Europe</td>
<td>Children</td>
<td>01/01/2009</td>
<td>$18,045.60</td>
<td>$24,646.82</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Europe</td>
<td>Children</td>
<td>02/01/2009</td>
<td>$17,145.60</td>
<td>$25,983.78</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Europe</td>
<td>Children</td>
<td>01/01/2011</td>
<td>$48,590.64</td>
<td>$9,029.84</td>
<td>$88,151.43</td>
<td></td>
</tr>
<tr>
<td>Europe</td>
<td>Children</td>
<td>02/01/2011</td>
<td>$49,339.80</td>
<td>$9,342.16</td>
<td>$89,337.44</td>
<td></td>
</tr>
<tr>
<td>U.S.</td>
<td>Children</td>
<td>01/01/2009</td>
<td>$24,677.70</td>
<td>$26,960.89</td>
<td></td>
<td></td>
</tr>
<tr>
<td>U.S.</td>
<td>Children</td>
<td>02/01/2009</td>
<td>$20,917.20</td>
<td>$28,943.96</td>
<td></td>
<td></td>
</tr>
<tr>
<td>U.S.</td>
<td>Children</td>
<td>01/01/2011</td>
<td>$88,852.77</td>
<td>$41,141.66</td>
<td>$136,563.88</td>
<td></td>
</tr>
<tr>
<td>U.S.</td>
<td>Children</td>
<td>02/01/2011</td>
<td>$82,747.69</td>
<td>$34,497.79</td>
<td>$130,997.59</td>
<td></td>
</tr>
</tbody>
</table>

For the best results when using this interactive indicator, the indicator data must meet the following requirements:

- The indicator data must be suitable for a bar chart. Indicator data that returns a single row and that is suitable for a KPI indicator is not suitable for an interactive indicator.
- The indicator data must contain one low-cardinality grouping column that is used to summarize the data. A low-cardinality grouping column is a column that has a small number of unique values to group by.
- (Optional) To enable an interactive indicator to express forecasting data to business users, the indicator data must contain a column for forecasted values, for lower confidence values, and for upper confidence values.

An interactive indicator can summarize either the detail data expressed in the detail charts or can summarize a different field of data.

At the indicator level, the setup of the interactive indicator is essentially the same as for bar charts, except that the use of data for the interactive indicators is more sophisticated. The only significant difference is that the interactive indicators support the concept of dependent ranges. A dependent range takes the value of another range for the range definition. This scheme enables a data set generated by the SAS Forecast Server to be useful to the SAS BI Dashboard and the interactive indicators without the need for complicated intermediary data transformations.
Interactive Summary and Scatter Plot

**Definition**

An interactive summary and scatter plot is a combination of graphical charts that shows how individual data points change over time when a slider is moved across a line graph that represents time. The scatter plot consists of a set of data points that are plotted to show the relation of one value against others. The interactive summary enables the user to see how the data points change over time.

An interactive display enables dashboard users to interactively traverse large amounts of detail data by sliding along a summary chart. Detail data can be easily compared using the following two methods:

- When the display is defined, the dashboard designer selects a column by which to group data.
- While viewing the display, the business user can select different detail slices to compare.

*Note:* This indicator can show actual and forecasted data over time. Additionally, it can show the confidence intervals for the future forecasted values. These values are provided by indicator data that is generated using SAS Time Series Forecasting.

**Figure A1.12 Example of an Interactive Summary and Scatter Plot Indicator**

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.
**Usage Information**

*Note:* SAS BI Dashboard 4.3 and later provides this indicator for support of environments that have been migrated from SAS BI Dashboard 4.2. It is not recommended that users of SAS BI Dashboard 4.3 or later use this indicator. Instead, use the chart with slider prompt indicator and the scatter plot indicator, and define an interaction between the two indicators to achieve the same functionality, but with superior control by way of the display settings.

- For more information, see “Adding Interactions between Indicators” on page 104.
- See “Chart with Slider Prompt” on page 150.
- See “Scatter Plot” on page 216.

**Data best suited for**
The interactive summary and scatter plot indicator is commonly used to show sales revenue numbers over time, compared to targets. Each plotted data point can represent sales versus target for a certain point in time. By moving the slider, the data points change to represent new sales versus target values. A range can color the background of the plot to add the target dimension.

**Not suited for**
The indicator data must be suitable for a scatter plot. Indicator data that returns a single row and that is suitable for a KPI indicator is not suitable for this indicator.

**Target audience**
This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. The ability to choose the time period that is displayed by the chart provides value and relevance to the user.

**Data aggregation support**
This indicator type does not aggregate the indicator data.

**Range support**
A range is required.

**Alert support**
Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.

**Link support**
This indicator type can be used to define a link only. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

**Interaction support**
- **Data filter support:** This indicator does not support data filtering.
- **Interactive highlighting support:** This indicator does not support interactive highlighting.

For more information, see “Adding Interactions between Indicators” on page 104.

**Filter multiple items support**
Filtering multiple items is not supported.
General Settings

The General Settings section provides controls that support the following tasks:

• “Specify the Height and Width of the Indicator” on page 75
• “Change the Indicator Type” on page 76
• “Change the Indicator Data to Use” on page 77
• “Change the Range to Use” on page 77

Note: When setting the height and width of this indicator type, remember that it has minimum legible dimensions of 380 x 450 pixels.

This indicator requires that you specify two ranges: the X-axis range and the Y-axis range. In the preceding example, the following ranges are used:

<table>
<thead>
<tr>
<th>General Setting</th>
<th>Selected Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis range</td>
<td>Lime Range</td>
</tr>
<tr>
<td>Y-axis range</td>
<td>Lemon Range</td>
</tr>
</tbody>
</table>

Remember the following guidelines when specifying the ranges:

• Both ranges must have the same number of intervals defined. Otherwise, the following message is displayed:
  The X range and the Y range must have the same number of intervals.
• Only the Y-axis range colors are displayed in the indicator.
• The intersection of the X-axis range and the Y-axis range defines the triangular shadings in the graph.

Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Lime Actual</td>
</tr>
<tr>
<td>Forecasted X-axis value</td>
<td>Lime Forecast</td>
</tr>
<tr>
<td>X-axis lower confidence</td>
<td>Lime Low</td>
</tr>
<tr>
<td>X-axis upper confidence</td>
<td>Lime Up</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Lemon Actual</td>
</tr>
<tr>
<td>Forecasted Y-axis value</td>
<td>Lemon Forecast</td>
</tr>
</tbody>
</table>
### Display Setting

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y-axis lower confidence</td>
<td>Lemon Low</td>
</tr>
<tr>
<td>Y-axis upper confidence</td>
<td>Lemon Up</td>
</tr>
<tr>
<td>Summarization graph type</td>
<td><strong>Line</strong> is selected.</td>
</tr>
<tr>
<td>Summarization function</td>
<td><strong>Sum</strong> is selected.</td>
</tr>
<tr>
<td>Custom label for summary graph</td>
<td>Set to 2010 Summary</td>
</tr>
<tr>
<td>Default data color</td>
<td><strong>Blue</strong> is selected.</td>
</tr>
<tr>
<td>Show legend</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>Summarize by</td>
<td>Month</td>
</tr>
<tr>
<td>Column group by</td>
<td>Store Region</td>
</tr>
<tr>
<td>Detail X-axis format</td>
<td><strong>123,456</strong> is selected.</td>
</tr>
<tr>
<td>Detail Y-axis format</td>
<td><strong>123,456</strong> is selected.</td>
</tr>
<tr>
<td>Summary axis format</td>
<td><strong>123,456</strong> is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

   The value of this setting is used in the graph tooltips. It is not possible to display additional information in the tooltip to distinguish points. However, you can use the **Column group by** setting to provide information about the points.

- (Required) From the **Forecasted X-axis value** list, select the value to use for the forecasted value for the X axis.

- From the **X-axis lower confidence** list, select the value to use for the lower confidence boundary on the X axis in an interactive indicator.

- From the **X-axis upper confidence** list, select the value to use for the upper confidence boundary on the X axis in an interactive indicator.

- (Required) From the **Y-axis value** list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **Y-axis value** list are all of the values in the **Column Name** column.

- From the **Forecasted Y-axis value** list, select the value to use for the forecasted value for the Y axis.
• From the **Y-axis lower confidence** list, select the value to use for the lower confidence boundary on the Y axis in an interactive indicator.

• From the **Y-axis upper confidence** list, select the value to use for the upper confidence boundary on the Y axis in an interactive indicator.

• From the **Alternate value to summarize** list, select the value to use for the summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

• From the **Alternate forecasted value to summarize** list, select the value to use for the forecasted value summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

• From the **Alternate lower confidence to summarize** list, select the value to use for the lower confidence summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

• From the **Alternate upper confidence to summarize** list, select the value to use for the upper confidence summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

• From the **Summarization graph type** list, select the type of graph to use to represent summary data in an interactive indicator.

• From the **Summarization function** list, select the function to use to summarize data in an interactive indicator.

• In the **Custom label for summary graph** field, type the text to use to replace the default title for the summary graph in an interactive indicator.

• From the **Default data color** field, select the default color for representing data in an interactive indicator.

• Select **Show legend** to specify that the legend is displayed in the indicator.

• (Required) From the **Summarize by** list, select the value to use to summarize data in an interactive indicator.

• From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select **(none)**.

• From the **Detail X-axis format** list, select the format to apply to the data on the detail X axis.

• From the **Detail Y-axis format** list, select the format to apply to the data on the detail Y axis.

• From the **Summary axis format** list, select the format to apply to the data on the summary axis.

**Sample Data Structure**

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.
<table>
<thead>
<tr>
<th>Month (Summarize by)</th>
<th>Store Region (Column group by)</th>
<th>Lime Actual (X-axis value)</th>
<th>Lime Forecast (Forecasted X-axis value)</th>
<th>Lime Low (X-axis lower confidence)</th>
<th>Lime Up (X-axis upper confidence)</th>
<th>Lemon Actual (Y-axis value)</th>
<th>Lemon Forecast (Forecasted Y-axis value)</th>
<th>Lemon Low (Y-axis lower confidence)</th>
<th>Lemon Up (Y-axis upper confidence)</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 AUG 2010</td>
<td>North East</td>
<td>3509</td>
<td>3899.25</td>
<td>5180</td>
<td>4010.1666667</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01 AUG 2010</td>
<td>West</td>
<td>3479</td>
<td>4028.5714286</td>
<td>4379</td>
<td>4309.2619048</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01 AUG 2010</td>
<td>Central</td>
<td>3934</td>
<td>4157.8928571</td>
<td>4033</td>
<td>4608.3571429</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01 AUG 2010</td>
<td>South East</td>
<td>6448</td>
<td>4545.8571429</td>
<td>5370</td>
<td>5505.6428571</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01 SEP 2010</td>
<td>North East</td>
<td>3769.9285714</td>
<td>473.67952229</td>
<td>7066.1776206</td>
<td>3711.0714286</td>
<td>1072.0041191</td>
<td>6350.138738</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01 SEP 2010</td>
<td>West</td>
<td>3381.9642857</td>
<td>-699.7096296</td>
<td>7463.638201</td>
<td>2813.7857143</td>
<td>-454.1142645</td>
<td>6081.685693</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01 SEP 2010</td>
<td>Central</td>
<td>3511.2857143</td>
<td>-284.3073884</td>
<td>7306.8788169</td>
<td>3112.8809524</td>
<td>74.02511133</td>
<td>6151.7367936</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
For the best results when using this interactive indicator, the indicator data must meet the following requirements:

- The indicator data must be suitable for a scatter plot. Indicator data that returns a single row and that is suitable for a KPI indicator is not suitable for an interactive indicator.

- The indicator data must contain one low-cardinality grouping column that is used to summarize the data. A low-cardinality grouping column is a column that has a small number of unique values to group by.

- (Optional) To enable an interactive indicator to express forecasting data to business users, the indicator data must contain a column for forecasted values, for lower confidence values, and for upper confidence values.

An interactive indicator can summarize either the detail data expressed in the detail charts or can summarize a different field of data.

At the indicator level, the setup of the interactive indicator is essentially the same as for scatter plots, except that the use of data for the interactive indicators is more sophisticated. The only significant difference is that the interactive indicators support the concept of dependent ranges. A dependent range takes the value of another range for the range definition. This scheme enables a data set generated by the SAS Forecast Server to be useful to the SAS BI Dashboard and the interactive indicators without the need for complicated intermediary data transformations.

## Interactive Summary and Targeted Bar Chart

### Definition

An interactive summary and targeted bar chart is a graph that consists of a grid and some vertical or horizontal columns (bars) with a slider that can be moved across the bars. A target value is represented by a reference line that is drawn in each bar.

An interactive display enables dashboard users to interactively traverse large amounts of detail data by sliding along a summary chart. Detail data can be easily compared using the following two methods:

- When the display is defined, the dashboard designer selects a column by which to group data.
- While viewing the display, the business user can select different detail slices to compare.

**Note:** This indicator can show actual and forecasted data over time. Additionally, it can show the confidence intervals for the future forecasted values. These values are provided by indicator data that is generated using SAS Time Series Forecasting.
Figure A1.13  Example of an Interactive Summary and Targeted Bar Chart Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

Note: SAS BI Dashboard 4.3 and later provides this indicator for support of environments that have been migrated from SAS BI Dashboard 4.2. It is not recommended that users of SAS BI Dashboard 4.3 or later use this indicator. Instead, use the chart with slider prompt indicator and the targeted bar chart indicator, and define an interaction between the two indicators to achieve the same functionality, but with superior control by way of the display settings.

- For more information, see “Adding Interactions between Indicators” on page 104.
- See “Chart with Slider Prompt” on page 150.
- See “Targeted Bar Chart” on page 240.

Data best suited for

Use an interactive summary and targeted bar chart when a target for each category (each bar in the chart) clearly needs to be displayed. If there is no need for this, a regular interactive summary and bar chart will suffice.

Not suited for

The indicator data must be suitable for a targeted bar chart. Indicator data that returns a single row and that is suitable for a KPI indicator is not suitable for this indicator.
Target audience

This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. The ability to choose the time period that is displayed by the chart provides value and relevance to the user. Associating the bars in the chart to a target and range enables the user to quickly see the performance of each category.

Data aggregation support

This indicator type averages the applicable indicator data.

*Note:* The detail bar chart always averages the data. However, you can select the aggregation method to use when summarizing data for the summary chart in the indicator. The default selection is **Sum**.

Range support

A range is required.

Alert support

Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.

Link support

This indicator type can be used to define a link only. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support

- **Data filter support:** This indicator does not support data filtering.
- **Interactive highlighting support:** This indicator does not support interactive highlighting.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is not supported.

### General Settings

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77

*Note:* When setting the height and width of this indicator type, remember that it has minimum legible dimensions of 380 x 450 pixels.

### Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range value</td>
<td>Percent Difference</td>
</tr>
<tr>
<td>Display Setting</td>
<td>Selection Used for Figure</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Forecasted range value</td>
<td>Predicted</td>
</tr>
<tr>
<td>X-axis value</td>
<td>Product Line</td>
</tr>
<tr>
<td>Bar value</td>
<td>Actual</td>
</tr>
<tr>
<td>Forecasted value</td>
<td>Predicted</td>
</tr>
<tr>
<td>Target value</td>
<td>Predicted</td>
</tr>
<tr>
<td>Lower confidence</td>
<td>LCL</td>
</tr>
<tr>
<td>Upper confidence</td>
<td>UCL</td>
</tr>
<tr>
<td>Summarization graph type</td>
<td>Line is selected.</td>
</tr>
<tr>
<td>Summarization function</td>
<td>Sum is selected.</td>
</tr>
<tr>
<td>Custom label for summary</td>
<td>Set to Total Sales — Trend</td>
</tr>
<tr>
<td>graph</td>
<td></td>
</tr>
<tr>
<td>Default data color</td>
<td>Black is selected.</td>
</tr>
<tr>
<td>Show legend</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>Summarize by</td>
<td>Delivery Date</td>
</tr>
<tr>
<td>Column group by</td>
<td>(none) is selected.</td>
</tr>
<tr>
<td>Detail axis format</td>
<td>$123,456 is selected.</td>
</tr>
<tr>
<td>Summary axis format</td>
<td>$123,456 is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the **Range value** list, select the value to which you want to apply the defined range intervals.

- From the **Forecast range value** list, select the value to use for the forecasted value, which is used for range coloring of the forecasted values in an interactive summary and targeted bar chart indicator.

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

- (Required) From the **Bar value** list, select the value that you want to use for the bars that are drawn in the indicator.

- (Required) From the **Forecasted value** list, select the value to use for the forecasted value in a forecast chart.
• From the **Target value** list, select the value that you want to use for the target markers in the indicator.

• From the **Lower confidence** list, select the value to use for the lower confidence boundary in an interactive display.

• From the **Upper confidence** list, select the value to use for the upper confidence boundary in an interactive indicator.

• From the **Alternate value to summarize** list, select the value to use for the summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

• From the **Alternate forecasted value to summarize** list, select the value to use for the forecasted value summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

• From the **Alternate lower confidence to summarize** list, select the value to use for the lower confidence summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

• From the **Alternate upper confidence to summarize** list, select the value to use for the upper confidence summarization. The summarized value is used to draw the summary line or bar chart at the bottom of the interactive charts.

• From the **Summarization graph type** list, select the type of graph to use to represent summary data in an interactive indicator.

• From the **Summarization function** list, select the function to use to summarize data in an interactive indicator.

• In the **Custom label for summary graph** field, type the text to use to replace the default title for the summary graph in an interactive indicator.

• From the **Default data color** field, select the default color for representing data in an interactive indicator.

• Select **Show legend** to specify that the legend is displayed in the indicator.

• (Required) From the **Summarize by** list, select the value to use to summarize data in an interactive indicator.

• From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select **(none)**.

• From the **Detail axis format** list, select the SAS format to apply to the data on the detail axis.

• From the **Summary axis format** list, select the format to apply to the data on the summary axis.

**Sample Data Structure**

To create an interactive summary and targeted bar chart, you must provide two variables (X-axis value and summarize by) and at least three measures (bar value, forecasted value, and range value). In this example, the data from 2011 also provides values for the optional lower and upper confidence settings.
The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Product Line</th>
<th>Delivery Date (Summarize by)</th>
<th>Actual (Bar value)</th>
<th>Predicted (Forecasted value, Forecasted range value, and Target value)</th>
<th>Upper Limit (Upper confidence)</th>
<th>Lower Limit (Lower confidence)</th>
<th>Percentage Difference (Range value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children</td>
<td>1/1/2009</td>
<td>51,065</td>
<td>69,125</td>
<td>98,581</td>
<td>39,669</td>
<td>–26.13%</td>
</tr>
<tr>
<td>Clothes &amp; Shoes</td>
<td>1/1/2009</td>
<td>564,101</td>
<td>647,098</td>
<td>854,784</td>
<td>439,413</td>
<td>–12.83%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>1/1/2009</td>
<td>502,799</td>
<td>439,984</td>
<td>609,154</td>
<td>270,814</td>
<td>14.28%</td>
</tr>
<tr>
<td>Sports</td>
<td>1/1/2009</td>
<td>917,930</td>
<td>871,717</td>
<td>1,191,439</td>
<td>551,994</td>
<td>5.30%</td>
</tr>
</tbody>
</table>

For the best results when using this interactive indicator, the indicator data must meet the following requirements:

- The indicator data must be suitable for a targeted bar chart. Indicator data that returns a single row and that is suitable for a KPI indicator is not suitable for an interactive indicator.

- The indicator data must contain one low-cardinality grouping column that is used to summarize the data. A low-cardinality grouping column is a column that has a small number of unique values to group by.

- (Optional) To enable an interactive indicator to express forecasting data to business users, the indicator data must contain a column for forecasted values, for lower confidence values, and for upper confidence values.

An interactive indicator can summarize either the detail data expressed in the detail charts or can summarize a different field of data.

At the indicator level, the setup of the interactive indicator is essentially the same as for targeted bar charts, except that the use of data for the interactive indicators is more sophisticated. The only significant difference is that the interactive indicators support the concept of dependent ranges. A dependent range takes the value of another range for the range definition. This scheme enables a data set generated by the SAS Forecast Server to be useful to the SAS BI Dashboard and the interactive indicators without the need for complicated intermediary data transformations.

---

**KPI (Key Performance Indicator)**

**Definition**

A key performance indicator (KPI) is a measurement that shows whether an organization is progressing toward its stated goals. In SAS BI Dashboard, KPIs can be speedometers, thermometers, tachometers, sliders, dials, arrows, traffic lights, and other types of gauges.
Figure A1.14  Example of a KPI, Subtype Dynamic Radial Thermometer

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

KPI Subtypes

When you click to select the KPI indicator type, the Gauge list appears. From this list, you can select a gauge subtype to use.

Table A1.1  Gauge Subtypes

<table>
<thead>
<tr>
<th>Category</th>
<th>Gauge subtype</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamic</td>
<td>Dynamic bullet bar</td>
<td>![Dynamic bullet bar icon]</td>
</tr>
<tr>
<td>Dynamic dial</td>
<td>![Dynamic dial icon]</td>
<td></td>
</tr>
<tr>
<td>Dynamic radial thermometer</td>
<td>![Dynamic radial thermometer icon]</td>
<td></td>
</tr>
<tr>
<td>Dynamic slider</td>
<td>![Dynamic slider icon]</td>
<td></td>
</tr>
<tr>
<td>Dynamic speedometer</td>
<td>![Dynamic speedometer icon]</td>
<td></td>
</tr>
<tr>
<td>Dynamic thermometer</td>
<td>![Dynamic thermometer icon]</td>
<td></td>
</tr>
<tr>
<td>Dynamic traffic light</td>
<td>![Dynamic traffic light icon]</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Gauge subtype</td>
<td>Icon</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------</td>
<td>------</td>
</tr>
<tr>
<td>Arrows and pointers</td>
<td>Arrow</td>
<td><img src="image" alt="Arrow Icon" /></td>
</tr>
<tr>
<td></td>
<td>Arrow (small)</td>
<td><img src="image" alt="Arrow Small Icon" /></td>
</tr>
<tr>
<td></td>
<td>Fancy arrow</td>
<td><img src="image" alt="Fancy Arrow Icon" /></td>
</tr>
<tr>
<td></td>
<td>Simple arrow</td>
<td><img src="image" alt="Simple Arrow Icon" /></td>
</tr>
<tr>
<td></td>
<td>Pointer</td>
<td><img src="image" alt="Pointer Icon" /></td>
</tr>
<tr>
<td>Dials</td>
<td>Simple dial</td>
<td><img src="image" alt="Simple Dial Icon" /></td>
</tr>
<tr>
<td></td>
<td>Marked dial</td>
<td><img src="image" alt="Marked Dial Icon" /></td>
</tr>
<tr>
<td></td>
<td>Dynamic dial</td>
<td><img src="image" alt="Dynamic Dial Icon" /></td>
</tr>
<tr>
<td></td>
<td>Dynamic radial thermometer</td>
<td><img src="image" alt="Dynamic Radial Thermometer Icon" /></td>
</tr>
<tr>
<td>Category</td>
<td>Gauge subtype</td>
<td>Icon</td>
</tr>
<tr>
<td>------------</td>
<td>---------------</td>
<td>------</td>
</tr>
<tr>
<td>Sliders</td>
<td>Slider</td>
<td>![Slider Icon]</td>
</tr>
<tr>
<td></td>
<td>Curved slider</td>
<td>![Curved slider Icon]</td>
</tr>
<tr>
<td></td>
<td>Dynamic slider</td>
<td>![Dynamic slider Icon]</td>
</tr>
<tr>
<td></td>
<td>Stylized slider</td>
<td>![Stylized slider Icon]</td>
</tr>
<tr>
<td></td>
<td>Vertical slider</td>
<td>![Vertical slider Icon]</td>
</tr>
<tr>
<td>Tachometers</td>
<td>Simple tachometer</td>
<td>![Simple tachometer Icon]</td>
</tr>
<tr>
<td></td>
<td>Highlighted tachometer</td>
<td>![Highlighted tachometer Icon]</td>
</tr>
<tr>
<td></td>
<td>Solid tachometer</td>
<td>![Solid tachometer Icon]</td>
</tr>
<tr>
<td></td>
<td>Reversed tachometer</td>
<td>![Reversed tachometer Icon]</td>
</tr>
<tr>
<td></td>
<td>Stylized tachometer</td>
<td>![Stylized tachometer Icon]</td>
</tr>
<tr>
<td>Traffic lights</td>
<td>Traffic light</td>
<td>![Traffic light Icon]</td>
</tr>
<tr>
<td></td>
<td>Traffic light (small)</td>
<td>![Traffic light (small) Icon]</td>
</tr>
<tr>
<td></td>
<td>Dynamic traffic light</td>
<td>![Dynamic traffic light Icon]</td>
</tr>
</tbody>
</table>
## Usage Information

### Data best suited for

A gauge displays the status or measure of a variable or variables in relation to a target, goal, or interval. Gauges are designed to achieve this goal in a way that is familiar to the user. Many gauges can be found in real-life objects such as cars and machines. Gauges can be used to display a quantity, range, variable, or status.

Gauges are most effective when they are used to instantly alert the business user of a status, without the user having to know many details. Business users should be able to grasp information at a glance. Gauges, especially round ones, can use up quite a bit of screen real estate, so keep this in mind. They are commonly used, however, due to their familiarity and ease of use.

### Not suited for

KPI gauges are not suitable for significant amounts of data. KPI gauges appear best with indicator data that produces summarized data with a limited number of data rows. If you use indicator data with significant amounts of data to drive a KPI, SAS BI Dashboard attempts to produce one KPI gauge representation for each row of data in the indicator data. For significant amounts of data, an indicator type that automatically summarizes the data is preferable. Bar charts are an example of this type of indicator.
Target audience
Some audiences might not be familiar with gauges. However, gauges are not difficult to interpret, so even if users are unfamiliar with this indicator type, they should be able to understand it. Be sure to label the value, the interval threshold values, and colors used to represent intervals (red for below target, yellow for on target, and green for above target).

Data aggregation support
This indicator type does not aggregate the indicator data.

Range support
A range is required.

Alert support
Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.

Link support
This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support
• Data filter support:
  • (For data filtering on local systems) This indicator type can be used as a source indicator only.
  • (For data filtering on remote servers) This indicator type can be used as either a source or a target indicator.

  • Interactive highlighting support: This indicator type can be used as a source indicator only.

  Note: The KPI does not support selection of multiple gauges.

  For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support
Filtering multiple items is not supported.

General Settings

The General Settings section provides controls that support the following tasks:
• “Specify the Height and Width of the Indicator” on page 75
• “Change the Indicator Type” on page 76
• “Change the Indicator Data to Use” on page 77
• “Change the Range to Use” on page 77
• “Specify the Graph Style” on page 76
• “Specify the Sort Order” on page 78
**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range value</td>
<td>Sale Amount</td>
</tr>
<tr>
<td>KPI title</td>
<td><strong>Category</strong> is selected.</td>
</tr>
<tr>
<td>Lines for title</td>
<td>2</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the **Range value** list, select the value to which you want to apply the defined range intervals.

  *Note:* The following KPI indicator gauge types support custom range color settings:
  - arrow
  - arrow (small)
  - button
  - cylinder
  - fancy arrow
  - pointer
  - simple arrow
  - slider
  - solid tachometer
  - traffic light (small)

- From the **Range value 2** list, select a second data point value that you want to represent in the gauge. If you do not want to use a second value, click **(none)**.

  *Note:* Not all KPI ranges use this setting.

- From the **KPI title** list, select the column name data to use as titles for the gauges in the KPI.

- From the **Lines for title** list, select the number of lines that you want to reserve for the title of a KPI. If there is no text on the line, the line is displayed as a blank.

- Click **Hide titles when zoomed out** if you want to hide the indicator titles when a user zooms out the view of an indicator. When the user zooms in, the titles reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- Click **Hide values when zoomed out** if you want to hide the indicator values when a user zooms out the view of an indicator. When the user zooms in, the values reappear. Select this setting to avoid visual clutter when the view is zoomed out.
Sample Data Structure

To create a KPI, you must provide a measure (range value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Category</th>
<th>Sale Amount (Range value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caramels</td>
<td>$625,601</td>
</tr>
<tr>
<td>Chocolate Bars</td>
<td>$6,988,757</td>
</tr>
<tr>
<td>Sugar Free</td>
<td>$1,133,940</td>
</tr>
<tr>
<td>Truffles</td>
<td>$2,230,216</td>
</tr>
</tbody>
</table>

Line Chart with Reference Lines

Definition

A line chart shows the relationship of one variable to another, often as movements or trends in the data over a period of time. Line charts summarize source data and typically are used to chart response values against discrete categorical values.

Figure A1.15  Example of a Line Chart with Reference Lines Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.
### Usage Information

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data best suited for</td>
<td>Use line charts when the change in a variable or variables clearly needs to be displayed or when trending or rate of change information is of value. When lines are stacked, line charts can be used to compare the trend or individual values for several variables.</td>
</tr>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type averages the applicable indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>A range is required.</td>
</tr>
<tr>
<td>Alert support</td>
<td>Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.</td>
</tr>
<tr>
<td>Link support</td>
<td>This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.</td>
</tr>
<tr>
<td>Interaction support</td>
<td>• <strong>Data filter support</strong>: This indicator type can be used as either a source or target indicator.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Interactive highlighting support</strong>: This indicator type can be used as either a source or target indicator.</td>
</tr>
<tr>
<td></td>
<td>For more information, see “Adding Interactions between Indicators” on page 104.</td>
</tr>
<tr>
<td>Filter multiple items support</td>
<td>Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.</td>
</tr>
</tbody>
</table>

### General Settings

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77
- “Specify the Sort Order” on page 78
Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Month</td>
</tr>
<tr>
<td>Primary value</td>
<td>Revenue</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Month)</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>&lt;blank&gt; (defaults to Revenue)</td>
</tr>
<tr>
<td>Note:</td>
<td>The Scale Y axis setting adds the label (millions) to the title.</td>
</tr>
<tr>
<td>Scale X axis</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>Scale Y axis</td>
<td>This setting is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the X-axis value list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the X-axis value list are all of the values in the Column Name column.

- (Required) From the Primary value list, select the parameter to use for the primary data line in a line chart with reference lines or a primary tick mark in a KPI gauge.

- From the Secondary value list, select the parameter to use for the secondary data line in a line chart or a secondary tick mark in a KPI gauge. If you do not want to specify a secondary value, select (none).

- In the X-axis title field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the X-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale X axis, a measurement label is added to the title.

- In the Y-axis title field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the Y-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale Y axis, a measurement label is added to the title.

- Select Scale X axis if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select Scale X axis, the X-axis title is displayed as Revenue (millions).

- Select Scale Y axis if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select Scale Y axis, the Y-axis title is displayed as Revenue (millions).
• Select **Hide axis tick labels** if you want to hide the axis tick labels when a user zooms out the view of an indicator. When the user zooms in, the axis tick labels reappear. Select this setting to avoid visual clutter when the view is zoomed out.

• Select **Hide axes when zoomed out** if you want to hide the axes when a user zooms out the view of an indicator. When the user zooms in, the axes reappear. Select this setting to avoid visual clutter when the view is zoomed out.

• Click **Hide reference lines** if you want to hide the reference lines when a user zooms out the view of an indicator. When the user zooms in, the reference lines reappear. Select this setting to avoid visual clutter when the view is zoomed out.

• From the **Row group by** list, select the value that you want to use to group rows of data. If you do not want to group the rows, select **(none)**.

• From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select **(none)**.

• From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

• From the **Y-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

• From the **X-axis labels** list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.

---

**Sample Data Structure**

To create a line chart, you must provide one variable (X-axis value) and one measure (primary value).

*Note:* Although the sample data does not do so, you can provide an optional measure to create a reference line (secondary value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Month (X-axis value)</th>
<th>Revenue (Primary value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>$1,956,055</td>
</tr>
<tr>
<td>February</td>
<td>$1,632,174</td>
</tr>
<tr>
<td>March</td>
<td>$1,433,003</td>
</tr>
<tr>
<td>April</td>
<td>$2,265,200</td>
</tr>
<tr>
<td>May</td>
<td>$2,669,076</td>
</tr>
</tbody>
</table>
Multi-Line Chart

Definition

A multi-line chart shows multiple data series, each as a line, on the same chart. A data series shows the relationship of one variable to another, often as movements or trends in the data over a period of time. Line charts summarize source data and typically are used to chart response values against discrete categorical values.

Figure A1.16  Example of a Multi-line Chart Indicator

![Multi-line Chart Example](image.png)

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>Use a multi-line chart when it is critical to compare multiple values for two or more different categories at a given point in time or at a given state. It is critical that each line has a different color (which is done automatically) so that the lines can be clearly distinguished if they overlap. The multi-line chart is best used when the summarized values for the Y axis are relatively close together, or if the specific value is not as important to view compared to the relative trend.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not suited for</td>
<td>The multi-line chart indicator supports displaying only one Y axis. Do not use this indicator if all of the lines cannot be represented by one Y axis. Also, it is preferable that the X-axis value be numeric data and not character data.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type does not aggregate the indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>Ranges are not supported.</td>
</tr>
<tr>
<td>Alert support</td>
<td>Alerts are not supported.</td>
</tr>
<tr>
<td>Link support</td>
<td>This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.</td>
</tr>
<tr>
<td>Interaction support</td>
<td>• Data filter support: This indicator type can be used as either a source or target indicator.</td>
</tr>
<tr>
<td></td>
<td>• Interactive highlighting support: This indicator type can be used as either a source or target indicator. For more information, see “Adding Interactions between Indicators” on page 104.</td>
</tr>
<tr>
<td>Filter multiple items</td>
<td>Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.</td>
</tr>
</tbody>
</table>

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>YEAR</td>
</tr>
<tr>
<td>Line group</td>
<td>COUNTRY</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>sales</td>
</tr>
<tr>
<td>X-axis title</td>
<td>Set to Year</td>
</tr>
</tbody>
</table>
You can customize the following display settings for this indicator:

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

- (Required) From the **Line group** list, select the value that you want to use to define the lines in the indicator.

- (Required) From the **Y-axis value** list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **Y-axis value** list are all of the values in the **Column Name** column.

- In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

- In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

- Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to *Revenue* and you select **Scale X axis**, the X-axis title is displayed as *Revenue (millions)*.

- Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to *Revenue* and you select **Scale Y axis**, the Y-axis title is displayed as *Revenue (millions)*.

- From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

- From the **Y-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.
• From the X-axis labels list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.

Sample Data Structure

To create a multi-line chart, you must provide two variables (one for the X axis and one for the lines) and one measure (Y axis).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Year (X-axis value)</th>
<th>Country (Line group)</th>
<th>Sales (Y-axis value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>Canada</td>
<td>755785.60</td>
</tr>
<tr>
<td>1995</td>
<td>Mexico</td>
<td>518103.99</td>
</tr>
<tr>
<td>1995</td>
<td>U.S.A.</td>
<td>2240967.12</td>
</tr>
<tr>
<td>1996</td>
<td>Canada</td>
<td>769110.40</td>
</tr>
<tr>
<td>1996</td>
<td>Mexico</td>
<td>528722.40</td>
</tr>
<tr>
<td>1996</td>
<td>U.S.A.</td>
<td>2264190.73</td>
</tr>
</tbody>
</table>

Needle Plot

Definition

A needle plot is a plot in which data points are connected by a vertical line that connects to a horizontal baseline. The baseline intersects the 0 value, or the minimum value on the vertical axis.
**Figure A1.17 Example of a Needle Plot Indicator**

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

### Usage Information

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Data best suited for</strong></td>
<td>Needle plots can be used when working with many data points that all extend from the same baseline. A common example of needle plot is the magnitude of earthquakes, which are represented by the needles in a needle plot. The horizontal axis typically represents time. Use a needle plot whenever there are too many data points to represent the data as a bar chart.</td>
</tr>
<tr>
<td><strong>Target audience</strong></td>
<td>Most people find this indicator type familiar and easy to interpret. However, it can sometimes be difficult for users to read. It is best for helping users to identify patterns, rather than read individual values.</td>
</tr>
<tr>
<td><strong>Data aggregation support</strong></td>
<td>This indicator type does not aggregate the indicator data.</td>
</tr>
<tr>
<td><strong>Range support</strong></td>
<td>Ranges are not supported.</td>
</tr>
<tr>
<td><strong>Alert support</strong></td>
<td>Alerts are not supported.</td>
</tr>
<tr>
<td><strong>Link support</strong></td>
<td>This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.</td>
</tr>
</tbody>
</table>
Interaction support

- **Data filter support:** This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support:** This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support
Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Week Number</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Sale Amount</td>
</tr>
<tr>
<td>X-axis title</td>
<td>Set to <em>Week Number in 2007</em></td>
</tr>
<tr>
<td>Y-axis title</td>
<td>Set to <em>Chocolate Bar Sales</em></td>
</tr>
<tr>
<td>Scale X axis</td>
<td>This setting is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the *Column Name* column. The selections available in the **X-axis value** list are all of the values in the *Column Name* column.

- (Required) From the **Y-axis value** list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the *Column Name* column. The selections available in the **Y-axis value** list are all of the values in the *Column Name* column.
• In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

• In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

• Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to **Revenue** and you select **Scale X axis**, the X-axis title is displayed as **Revenue (millions)**.

• Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to **Revenue** and you select **Scale Y axis**, the Y-axis title is displayed as **Revenue (millions)**.

• From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

• From the **Y-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

• From the **X-axis labels** list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.

**Sample Data Structure**

To create a needle plot, you must provide two measures (X-axis value and Y-axis value). The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Week Number (X-axis value)</th>
<th>Sale Amount (Y-axis value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
<td>$16,653</td>
</tr>
<tr>
<td>1.00</td>
<td>$38,456</td>
</tr>
<tr>
<td>2.00</td>
<td>$24,601</td>
</tr>
<tr>
<td>3.00</td>
<td>$66,171</td>
</tr>
</tbody>
</table>
Pie Chart

Definition

A pie chart is a circular chart that is divided into slices by radial lines. Each slice represents the relative contribution of each part to the whole.

Figure A1.18  Example of a Pie Chart Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>Pie charts work best when working with limited components (five or fewer) and when including text in either a legend or next to the pie itself so that the business user does not have to guess the meaning and value of each slice.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not suited for</td>
<td>Although pie charts are commonly used in reports and presentations, they can be difficult to interpret because the human eye can have difficulty estimating area and comparing angles, both of which are necessary to draw conclusions from a pie chart. Due to these difficulties, avoid pie charts with many slices or slices with values that are close to each other. Also note that pie charts take up a lot of space because they are round, and are therefore not an efficient use of space on an indicator. A bar chart is usually a more efficient and easier to interpret indicator type option.</td>
</tr>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people will find this indicator type familiar and easy to interpret if the previous suggestions are used.</td>
</tr>
</tbody>
</table>
Data aggregation support

This indicator type sums the applicable indicator data.

Range support

Ranges are not supported.

Alert support

Alerts are not supported.

Link support

This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support

- **Data filter support**: This indicator type can be used as either a source or target indicator.

- **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.

  For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

---

### General Settings

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

### Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category value</td>
<td>Product Line</td>
</tr>
<tr>
<td>Response value</td>
<td>Sales</td>
</tr>
<tr>
<td>Show labels</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>Show legend</td>
<td>This setting is not selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:
• (Required) From the **Category value** list, select the value that you want to use for the indicator.

• (Required) From the **Response value** list, select the response value that you want to use for the pie slices that are drawn in the indicator.

• Select **Show labels** if you want the indicator to include the labels for each map portion or pie slice.

• Select **Show legend** to specify that the legend is displayed in the indicator.

**Sample Data Structure**

To create a pie chart, you must provide a variable (category value) and a measure (response value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Product Line (Category value)</th>
<th>Sales (Response value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caramels</td>
<td>$625,601</td>
</tr>
<tr>
<td>Chocolate Bars</td>
<td>$6,988,757</td>
</tr>
<tr>
<td>Sugar Free</td>
<td>$1,133,940</td>
</tr>
<tr>
<td>Truffles</td>
<td>$2,230,216</td>
</tr>
</tbody>
</table>

**Range Map**

**Definition**

A range map is a chart that compares data points in terms of position and range. The ranges in a range map are defined by colors and border each other such that every part of the map represents a certain range.
**Usage Information**

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>Range maps can be used when comparing data points in terms of position and range. Use range maps when there are many data points in different ranges. For example, range maps can be used when representing the body weight of males across different ranges: underweight, healthy, overweight, and obese. Each data point should fall into one of these ranges on the map.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. The addition of zones related to a range help the user quickly compare data points based on meaningful performance intervals.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type does not aggregate the indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>A range is required.</td>
</tr>
<tr>
<td>Alert support</td>
<td>Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.</td>
</tr>
<tr>
<td>Link support</td>
<td>This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.</td>
</tr>
</tbody>
</table>
Interaction support

- **Data filter support:** This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support:** This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

---

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77

This indicator requires that you specify two ranges: the X-axis range and the Y-axis range. In the preceding figure, the X-axis range uses a range defined for grades, and the Y-axis range uses a range defined for study hours.

**Note:** Both ranges must have the same number of intervals defined. Otherwise, the following message is displayed:

The X range and the Y range must have the same number of intervals.

---

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Point label</td>
<td>Student</td>
</tr>
<tr>
<td>X-axis value</td>
<td>Grade</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Study Hours</td>
</tr>
<tr>
<td>Show labels</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Grade)</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>&lt;blank&gt; (defaults to Study Hours)</td>
</tr>
<tr>
<td>Scale X axis</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>Display Setting</td>
<td>Selection Used for Figure</td>
</tr>
<tr>
<td>-----------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Scale Y axis</td>
<td>This setting is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the **Point label** list, select the value that you want to use to label the data points.
- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.
- (Required) From the **Y-axis value** list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **Y-axis value** list are all of the values in the **Column Name** column.
- Select **Show labels** if you want the indicator to include the labels for each map portion or pie slice.
- In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.
- In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.
- Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select **Scale X axis**, the X-axis title is displayed as Revenue (millions).
- Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select **Scale Y axis**, the Y-axis title is displayed as Revenue (millions).
- Select **Hide axes when zoomed out** if you want to hide the axes when a user zooms out the view of an indicator. When the user zooms in, the axes reappear. Select this setting to avoid visual clutter when the view is zoomed out.
- Select **Hide axis tick labels** if you want to hide the axis tick labels when a user zooms out the view of an indicator. When the user zooms in, the axis tick labels reappear. Select this setting to avoid visual clutter when the view is zoomed out.
- From the **Row group by** list, select the value that you want to use to group rows of data. If you do not want to group the rows, select **(none)**.
- From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select **(none)**.
- From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.
• From the **Y-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

**Sample Data Structure**

To create a range map, you must provide a variable (point label) and two measures (X-axis value and Y-axis value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Student (Point label)</th>
<th>Grade (X-axis value)</th>
<th>Study Hours (Y-axis value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kara</td>
<td>79.00</td>
<td>14.00</td>
</tr>
<tr>
<td>Karen</td>
<td>100.00</td>
<td>25.00</td>
</tr>
<tr>
<td>Kat</td>
<td>55.00</td>
<td>8.00</td>
</tr>
<tr>
<td>Keith</td>
<td>91.00</td>
<td>20.00</td>
</tr>
</tbody>
</table>

**Scatter Histogram**

**Definition**

A scatter histogram is a type of scatter plot that has a horizontal and vertical histogram along the top and right side of the graph. The purpose of the horizontal and vertical bars is to show the frequency of the data points taken as columns and rows.
Figure A1.20  Example of a Scatter Histogram Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data best suited for</td>
<td>Use a scatter histogram when it is necessary to display both individual data points and summaries of the points. An example of this might be test scores for a class over a range of six years. The individual test scores for each year can be displayed as data points on the graph itself, while the histogram displays the count of the scores in bar format.</td>
</tr>
<tr>
<td>Target audience</td>
<td>Most users will be unfamiliar with this indicator type. It is not recommended that you use this indicator type unless you are sure your audience knows how to interpret it, or you provide instructions on how to interpret it.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type does not aggregate the indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>Ranges are not supported.</td>
</tr>
<tr>
<td>Alert support</td>
<td>Alerts are not supported.</td>
</tr>
<tr>
<td>Link support</td>
<td>This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.</td>
</tr>
</tbody>
</table>
Interaction support

- **Data filter support**: This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Height</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Weight</td>
</tr>
<tr>
<td>X-axis title</td>
<td>Set to <em>Height in Inches</em></td>
</tr>
<tr>
<td>Y-axis title</td>
<td>Set to <em>Weight in Pounds</em></td>
</tr>
<tr>
<td>Scale X axis</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>Scale Y axis</td>
<td>This setting is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

- (Required) From the **Y-axis value** list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column.
The selections available in the **Y-axis value** list are all of the values in the **Column Name** column.

- In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

- In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

- Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select **Scale X axis**, the X-axis title is displayed as Revenue (millions).

- Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select **Scale Y axis**, the Y-axis title is displayed as Revenue (millions).

### Sample Data Structure

To create a scatter histogram, you must provide two measures (X-axis value and Y-axis value).

**Tip** This indicator does not provide many display settings that can cluster or group data. Therefore, make sure that the indicator data is aggregated to produce a meaningful representation of data.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Height (X-axis value)</th>
<th>Weight (Y-axis value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>54.75</td>
<td>127.00</td>
</tr>
<tr>
<td>55.75</td>
<td>94.00</td>
</tr>
<tr>
<td>58.00</td>
<td>131.00</td>
</tr>
</tbody>
</table>

### Scatter Plot

**Definition**

A scatter plot is a chart that consists of a set of data points that are plotted on horizontal and vertical axes to show the relation of one value against another.
Usage Information

Data best suited for Scatter plots can be used when many data points are present and there is interest in determining whether a correlation exists between the data points. For example, to determine whether there is a correlation between the outside temperature and the number of forest fires in a given region, each forest fire could be plotted at the outside temperature at the time of the forest fire. When all data points are plotted, the user can either visually determine whether data points are related, or can use an equation to determine the correlation between data points by using best-fit procedures. Note that this determination is not automatically done by simply creating the scatter plot.

Target audience This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret.

Data aggregation support This indicator type does not aggregate the indicator data.

Range support A range is required.

Alert support Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.

Link support This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.
Interaction support

- **Data filter support**: This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range value</td>
<td>Profit %</td>
</tr>
<tr>
<td>Point label</td>
<td>Product Group</td>
</tr>
<tr>
<td>X-axis value</td>
<td>Profit</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Avg Price Per Unit</td>
</tr>
<tr>
<td>Show labels</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Profit)</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: The Scale X axis setting adds the label (millions) to the title.</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>&lt;blank&gt; (defaults to Avg Price Per Unit)</td>
</tr>
<tr>
<td>Scale X axis</td>
<td>This setting is selected.</td>
</tr>
<tr>
<td>Scale Y axis</td>
<td>This setting is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:
• (Required) From the Range value list, select the value to which you want to apply the defined range intervals.

• (Required) From the Point label list, select the value that you want to use to label the data points.

• (Required) From the X-axis value list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the X-axis value list are all of the values in the Column Name column.

• (Required) From the Y-axis value list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the Y-axis value list are all of the values in the Column Name column.

• Select Show labels if you want the indicator to include the labels for each map portion or pie slice.

• In the X-axis title field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the X-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale X axis, a measurement label is added to the title.

• In the Y-axis title field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the Y-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale Y axis, a measurement label is added to the title.

• Select Scale X axis if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select Scale X axis, the X-axis title is displayed as Revenue (millions).

• Select Scale Y axis if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select Scale Y axis, the Y-axis title is displayed as Revenue (millions).

• Select Hide axes when zoomed out if you want to hide the axes when a user zooms out the view of an indicator. When the user zooms in, the axes reappear. Select this setting to avoid visual clutter when the view is zoomed out.

• Select Hide axis tick labels if you want to hide the axis tick labels when a user zooms out the view of an indicator. When the user zooms in, the axis tick labels reappear. Select this setting to avoid visual clutter when the view is zoomed out.

• From the Row group by list, select the value that you want to use to group rows of data. If you do not want to group the rows, select (none).

• From the Column group by list, select the value that you want to use to group columns of data. If you do not want to group the columns, select (none).

• From the X-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

• From the Y-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.
Sample Data Structure

To create a scatter plot, you must provide a variable (point label) and three measures (range value, X-axis value, Y-axis value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Profit percentage (Range value)</th>
<th>Product Group (Point label)</th>
<th>Profit (X-axis value)</th>
<th>Average Price Per Unit (Y-axis value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>71.46%</td>
<td>Golf clothes</td>
<td>$2,052,303</td>
<td>$111.41</td>
</tr>
<tr>
<td>56.29%</td>
<td>Gymnastic clothing</td>
<td>$303,411</td>
<td>$47.03</td>
</tr>
<tr>
<td>57.81%</td>
<td>Bathing suits</td>
<td>$1,486,572</td>
<td>$34.59</td>
</tr>
</tbody>
</table>

Schedule Chart

Definition

A schedule chart (also called Gantt chart) is a graphic representation of the tasks that make up a project. The chart shows start and finish dates, the duration of each task, the order of the tasks, and any dependencies among the tasks.

Figure A1.22  Example of a Schedule Chart Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.
**Usage Information**

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>Schedule charts are commonly used to display how certain tasks, events, or activities are scheduled over time. Although not required, displaying the task on the vertical axis and the time factor on the horizontal axis makes the chart easier to read. Schedule charts are especially useful for comparing task length and frequency. A third factor can be introduced by assigning a different color to each bar. This color can represent items such as categories, importance, or urgency.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target audience</td>
<td>Use caution when choosing the schedule chart because most people might not be familiar with this indicator type. However, it is not difficult to interpret, so even users who are unfamiliar with this indicator type should be able to understand it. Audiences that might be familiar with this indicator type include business analysts, business users, executives, and financial analysts.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type does not aggregate the indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>Ranges are not supported.</td>
</tr>
<tr>
<td>Alert support</td>
<td>Alerts are not supported.</td>
</tr>
<tr>
<td>Link support</td>
<td>This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.</td>
</tr>
</tbody>
</table>

**Interaction support**

- **Data filter support**: This indicator type can be used as either a source or target indicator.

- **Interactive highlighting support**: This indicator type can be used as either a source or target indicator. For more information, see “Adding Interactions between Indicators” on page 104.

**Filter multiple items support**

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78
Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task value</td>
<td>Task</td>
</tr>
<tr>
<td>Group by value</td>
<td>Team</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date</td>
</tr>
<tr>
<td>Finish date</td>
<td>End date</td>
</tr>
<tr>
<td>X-axis title</td>
<td>Set to Start</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>&lt;blank&gt; (defaults to Task)</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

• (Required) From the **Task** list, select the value that you want to use for the task axis in the indicator.

• (Required) From the **Group by value** list, select the value that you want to use to group the data in the indicator.

• (Required) From the **Start date** list, select the start date for the tasks in the indicator.

• (Required) From the **Finish date** list, select the finish date for the tasks in the indicator.

• In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

• In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

• Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to **Revenue** and you select **Scale X axis**, the X-axis title is displayed as **Revenue (millions)**.

• Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to **Revenue** and you select **Scale Y axis**, the Y-axis title is displayed as **Revenue (millions)**.

• From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.
**Sample Data Structure**

To create a schedule chart, you must provide two variables and two dates (start and finish).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Team</th>
<th>Task</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team</td>
<td>Task</td>
<td>(Start date)</td>
<td>(Finish date)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kelly’s Team</td>
<td>Task 1</td>
<td>01/01/2010</td>
<td>01/07/2010</td>
</tr>
<tr>
<td>Bill’s Team</td>
<td>Task 2</td>
<td>01/06/2010</td>
<td>02/05/2010</td>
</tr>
<tr>
<td>Jim’s Team</td>
<td>Task 3</td>
<td>01/14/2010</td>
<td>01/28/2010</td>
</tr>
<tr>
<td>Jim’s Team</td>
<td>Task 4</td>
<td>01/21/2010</td>
<td>01/28/2010</td>
</tr>
<tr>
<td>Jim’s Team</td>
<td>Task 5</td>
<td>01/25/2010</td>
<td>02/05/2010</td>
</tr>
<tr>
<td>Bill’s Team</td>
<td>Task 6</td>
<td>02/02/2010</td>
<td>02/10/2010</td>
</tr>
</tbody>
</table>

---

**Simple Bar Chart**

**Definition**

A simple bar chart consists of a grid and some vertical or horizontal columns (bars). Each column represents quantitative data.

*Note*: This indicator only supports vertical bars.
Figure A1.23   Example of a Simple Bar Chart Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

Data best suited for

Bar charts are one of the most commonly used charts. They allow the user to quickly compare the value for different variables, values, or categories of data. Use a simple bar chart when values are distinct enough that differences in the bars can be detected by the human eye.

Not suited for

When values are very close together, it becomes more difficult to easily compare bars against each other.

Target audience

This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. It is popular and commonly used to compare values of different categories. All audiences should be familiar with the horizontal and vertical versions of this indicator type and find them both easy to interpret.

Data aggregation support

This indicator type sums the applicable indicator data.

Range support

Ranges are not supported.

Alert support

Alerts are not supported.

Link support

This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.
Interaction support

- **Data filter support:** This indicator type can be used as either a source or target indicator.

- **Interactive highlighting support:** This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

---

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Candy Category</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Quantity</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Candy Category)</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>&lt;blank&gt; (defaults to Quantity)</td>
</tr>
<tr>
<td>Scale X axis</td>
<td>This setting is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the X-axis value list are all of the values in the Column Name column.

- (Required) From the **Y-axis value** list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column.
The selections available in the Y-axis value list are all of the values in the Column Name column.

- In the X-axis title field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the X-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale X axis, a measurement label is added to the title.

- In the Y-axis title field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the Y-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale Y axis, a measurement label is added to the title.

- Select Scale X axis if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select Scale X axis, the X-axis title is displayed as Revenue (millions).

- Select Scale Y axis if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select Scale Y axis, the Y-axis title is displayed as Revenue (millions).

- From the X-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

- From the Y-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

- From the X-axis labels list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.

**Sample Data Structure**

To create a simple bar chart, you must provide a variable (X-axis value) and a measure (Y-axis value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Candy Category (X-axis value)</th>
<th>Quantity (Y-axis value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caramels</td>
<td>808,183</td>
</tr>
<tr>
<td>Chocolate Bars</td>
<td>66,451</td>
</tr>
<tr>
<td>Sugar Free</td>
<td>57,717</td>
</tr>
<tr>
<td>Truffles</td>
<td>307,045</td>
</tr>
</tbody>
</table>
Spark Table

Definition

A spark table is a collection of data rows that can be summarized and represented with a sparkline. Each sparkline shows a trend associated with a data measurement. Spark tables can also include associated data and gauges.

Note:

- Depending on the specified settings, a spark table indicator can display any number and combination of data columns (variable and metric), gauges, and sparkline trending graphs.

- The spark table indicator type replaces the KPI table and bar and trend indicator types that were available in earlier versions of SAS BI Dashboard.

Figure A1.24 Example of a Spark Table Indicator with Gauges and a Sparkline Graph

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

For an example of using this indicator, see “Example: Creating a Spark Table” on page 82.

Data best suited for Spark tables should be used when sparklines can add useful information at a glance for the user. Sparklines provide simple linear graphic representations of complex data. Spark trend lines should be used in spark tables when individual data points do not have to be displayed in line chart format. In other words, a general trend should give the business user a sense for where the data is heading, but not every data point on the spark table has to be revealed in order to get value out of the table. Use spark tables when there is ample data to form trend lines and when data can translate into a status to create ranges for small KPIs.

Target audience Some audiences might not be familiar with sparklines. However, sparklines are designed to be easy to interpret, so even if users are unfamiliar with this indicator type, they should be able to understand it. Adding graphics to the spark table provides context for the user that might improve understanding. Audiences that might be familiar with this indicator type include business analysts, business users, executives, and financial analysts.
Data aggregation support  You can configure a spark table indicator to aggregate data, and you can select the type of aggregation to use for each column in the spark table.

Range support  Ranges are optionally supported.

Alert support  Alerts are supported only if a range is associated with the indicator. For information, see Chapter 13, “Customizing Alerts,” on page 119.

Link support  This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support  • Data filter support: This indicator type can be used as either a source or target indicator.

  Note: (Filtering data on a local system only) To use a spark table indicator as a target, the Spark group by and Spark X axis settings must be set to (none). This means that you cannot show a sparkline when you use a spark table indicator as a target for a filter.

• Interactive highlighting support: This indicator type can be used as either a source or target indicator.

  For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support  Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

---

**General Settings**

The General Settings section provides controls that support the following tasks:

• “Specify the Height and Width of the Indicator” on page 75
• “Change the Indicator Type” on page 76
• “Change the Indicator Data to Use” on page 77
• “Change the Range to Use” on page 77
• “Specify the Sort Order” on page 78

---

**Spark Table Columns**

You can add and delete columns in the spark table.

• To delete a column, hover over the column heading of the data column that you want to remove. The column menu appears.
Click and select **Delete column**. The column is removed from the spark table. This only deletes the column from the indicator. The deletion does not affect the indicator data source.

- To add a column, click the column to the left of the location that you want for the new column. Then click **Add column**.

### Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spark group by</td>
<td>Product Line</td>
</tr>
<tr>
<td>Spark X axis</td>
<td>Date Order Was Delivered</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- From the **Spark group by** list, select the value by which to group a spark table.
  
  *Note:* Multiple rows of data are condensed into a single row.

- From the **Spark X axis** list, select the value to use for a column’s gauge or the X axis for a column’s sparkline (graph).
  
  *Note:* If there are multiple sparkline data columns in the indicator source data, each data column must use the same X-axis value.

- Click **Highlight last row** if you want the last row in a spark table to be highlighted. When the source data table uses the last column for summarization, highlighting the last row emphasizes the summarized values.

### Column Properties

Use the Column section to specify how each column in the spark table is displayed. To view the current property settings for a column, click the column in the spark table.

**Tip** Make sure that the column is highlighted. You might have to click another column heading and then click the new column again.

The following column settings for the sparkline column are used in the preceding figure.

<table>
<thead>
<tr>
<th>Column Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source data</td>
<td>Actual</td>
</tr>
<tr>
<td>Column title</td>
<td>Set to <em>Monthly Sales Trend</em></td>
</tr>
</tbody>
</table>
You can customize the following properties for each column in the spark table.

- (Required) From the **Source data** list, select the source data that you want displayed in this column. Depending on the **Aggregate function** selection, the data is used for the Y axis of a sparkline or for a gauge.

- In the **Column title** field, type the title to use for the data in this column. Use a title that describes the sparkline or gauge that you have specified.

- From the **Column width (%)** list, select the width to use, as a percentage, for the selected column width in the spark table.

**T I P**

- When adjusting the width of the columns in a spark table, work from left to right in the spark table.

- Use the **Column width (%)** list to change the column width instead of dynamically resizing the column by dragging the column border. Dragging causes all of the data in the column (such as sparklines) to be recalculated. The recalculation can cause performance delays.

- Column size changes made by dragging are not saved with the indicator. Only column size changes in the **Column width (%)** field are saved with the indicator.

- Click **Unfold when zoomed** if you want to hide the column when a user zooms out and the table is viewed at 100%. When the user zooms in, the table enlarges and the affected column unfolds and is visible. Select this setting to avoid visual clutter when the view is zoomed out.

- From the **Aggregate function** list, select the type of function to use for aggregating the data in the column. If you select **Sparkline**, the gauge settings are unavailable,
Spark Table 231

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sparkline</td>
<td>Displays the source data as a trending graph for each row.</td>
</tr>
<tr>
<td></td>
<td>Note: In order for a sparkline to appear, the Spark Group by property must be set.</td>
</tr>
</tbody>
</table>

- From the **Format** list, select the format to apply to the data in a column.
- In the **Range** field, type the filename of a previously saved range, or click **Browse** and navigate to the file. Select the file and click **OK**.
- From the **Gauge type** list, select the type of gauge that you want to use in the column.
- Click **Enable ghosting** if you want to remove all the colors from the KPI gauge except where the value intersects the range segment.
  
  **Note:** Select this setting to make it easier to see the correct range value with a small KPI gauge.
- Click **Hide gauge label** if you do not want to display the labels for the gauges. Select this setting to avoid visual clutter when the view is zoomed out.
- From the **Range value** list, select the value to which you want to apply the defined range intervals.
- From the **Range value 2** list, select a second data point value that you want to represent in the gauge. If you do not want to use a second value, click **(none)**.

  **Note:** Not all gauges use this setting.

**Sample Data Structure**

To create a spark table with a sparkline, you must provide two variables (spark group by and spark X-axis) and a measure (source data). Depending on the selection in the Aggregate function list, the Actual column is displayed as a sparkline or a gauge.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Date Order Was Delivered (Spark X axis)</th>
<th>Product Line (Spark group by)</th>
<th>Actual (Source data)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007JAN</td>
<td>Children</td>
<td>127348.2</td>
</tr>
<tr>
<td>2007JAN</td>
<td>Clothing</td>
<td>390431.7025</td>
</tr>
<tr>
<td>2007JAN</td>
<td>Outdoors</td>
<td>331445.64</td>
</tr>
<tr>
<td>2007JAN</td>
<td>Sports</td>
<td>555983.2925</td>
</tr>
</tbody>
</table>
Stacked Bar Chart

Definition

A stacked bar chart consists of a grid and some vertical or horizontal columns (bars) that include subgroups, or stacks, of data. Each column represents quantitative data. Bar charts can contain horizontal or vertical bars that are each subdivided into multiple components. Each of these components shows its relative contribution to the entire bar and the entity as a whole.

Figure A1.25  Example of a Stacked Bar Chart Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

Data best suited for

Use a stacked bar chart when each bar (such as a category) can be broken down into smaller components that add up to the entire value of the bar. An example of this is when each bar represents sales for a year and each year is broken down into sales for each quarter. In this example, each bar consists of four subcomponents, each representing sales for a specific quarter.

Not suited for

Stacked bar charts are not as effective when the subcomponents have values that are very similar or close together. The goal with a stacked bar chart is to show the breakdown of an entity. If there is little or no breakdown, a simple bar chart is more appropriate.

Target audience

This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret.
Data aggregation support
This indicator type sums the applicable indicator data.

Range support
Ranges are not supported.

Alert support
Alerts are not supported.

Link support
This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support
- **Data filter support**: This indicator type can be used as either a source or target indicator.
- **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support
Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

**General Settings**

The General Settings section provides controls that support the following tasks:
- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Year</td>
</tr>
<tr>
<td>Stack group</td>
<td>Product Line</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Sales</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Year)</td>
</tr>
</tbody>
</table>
You can customize the following display settings for this indicator:

- (Required) From the X-axis value list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the X-axis value list are all of the values in the Column Name column.

- (Required) From the Stack group list, select the value that you want to use to define the stacked grouping in the indicator.

- (Required) From the Y-axis value list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the Y-axis value list are all of the values in the Column Name column.

- In the X-axis title field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the X-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale X axis, a measurement label is added to the title.

- In the Y-axis title field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the Y-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale Y axis, a measurement label is added to the title.

- Select Scale X axis if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select Scale X axis, the X-axis title is displayed as Revenue (millions).

- Select Scale Y axis if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select Scale Y axis, the Y-axis title is displayed as Revenue (millions).

- From the X-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

- From the Y-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

- From the X-axis labels list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.
Sample Data Structure

To create a stacked bar chart, you must provide two variables (one for the bar and one for the stack) and one measure.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Year (X-axis value)</th>
<th>Product Line (Stack group)</th>
<th>Sales (Y-axis value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>Children</td>
<td>35,000</td>
</tr>
<tr>
<td>2008</td>
<td>Clothes &amp; Shoes</td>
<td>50,500</td>
</tr>
<tr>
<td>2008</td>
<td>Outdoors</td>
<td>40,000</td>
</tr>
<tr>
<td>2008</td>
<td>Sports</td>
<td>20,000</td>
</tr>
<tr>
<td>2009</td>
<td>Children</td>
<td>35,000</td>
</tr>
<tr>
<td>2009</td>
<td>Clothes &amp; Shoes</td>
<td>52,500</td>
</tr>
<tr>
<td>2009</td>
<td>Outdoors</td>
<td>42,000</td>
</tr>
<tr>
<td>2009</td>
<td>Sports</td>
<td>18,500</td>
</tr>
</tbody>
</table>

Stacked Bar and Line Chart

Definition

A stacked bar and line chart has two parts:

- a grid and some vertical or horizontal columns (bars) that include subgroups, or stacks, of data. Each column represents quantitative data. Bar charts can contain horizontal or vertical bars that are each subdivided into multiple components. Each of these components shows its relative contribution to the entire bar and the entity as a whole.

- a line that represents a data series. A data series shows the relationship of one variable to another, often as movements or trends in the data over a period of time. Line charts summarize source data and typically are used to chart response values against discrete categorical values.
Figure A1.26  Example of a Stacked Bar and Line Chart Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

Data best suited for

   Use a stacked bar and line chart when the following criteria apply:
   • Each bar (such as a category) can be broken down into smaller components that add up to the entire value of the bar.
   • It is critical to compare multiple values for another category at a given point in time or state, as compared to the categories that are represented by the bars.

Not suited for

   Stacked bar and line charts are not as effective when the subcomponents have values that are very similar or close together. The goal with a stacked bar and line chart is to show the breakdown of an entity. If there is little or no breakdown, a simple bar chart is more appropriate.

Target audience

   This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret.

Data aggregation support

   This indicator type sums the applicable indicator data.

Range support

   Ranges are not supported.

Alert support

   Alerts are not supported.
Link support
This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support
• **Data filter support**: This indicator type can be used as either a source or target indicator.

• **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support
Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

---

**General Settings**

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>X-axis value</td>
<td>Month</td>
</tr>
<tr>
<td>Stack group</td>
<td>Sex</td>
</tr>
<tr>
<td>Y-axis value</td>
<td>Students</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Month)</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>&lt;blank&gt; (defaults to Students)</td>
</tr>
<tr>
<td>Scale Y axis</td>
<td>This setting is selected.</td>
</tr>
</tbody>
</table>

You can customize the following display settings for this indicator:

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column.
The selections available in the X-axis value list are all of the values in the Column Name column.

- (Required) From the Stack group list, select the value that you want to use to define the stacked grouping in the indicator.

- (Required) From the Y-axis value list, select the column in your data that you want to use for the Y-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the Column Name column. The selections available in the Y-axis value list are all of the values in the Column Name column.

- From the Target value list, select the value that you want to use for the line chart.

- In the X-axis title field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the X-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale X axis, a measurement label is added to the title.

- In the Y-axis title field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the Y-axis value list is used by default. If you do not want a title, type a space in the field. If you select Scale Y axis, a measurement label is added to the title.

- Select Scale X axis if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to Revenue and you select Scale X axis, the X-axis title is displayed as Revenue (millions).

- Select Scale Y axis if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to Revenue and you select Scale Y axis, the Y-axis title is displayed as Revenue (millions).

- From the X-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

- From the Y-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

- From the X-axis labels list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.

**Sample Data Structure**

To create a stacked bar and line chart, you must provide two variables (X-axis and stack) and two measures (Y-axis and target value for the line).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Month (X-axis value)</th>
<th>Sex (Stack group)</th>
<th>Students (Y-axis value)</th>
<th>UCL (Target value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>M</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>Month (X-axis value)</td>
<td>Sex (Stack group)</td>
<td>Students (Y-axis value)</td>
<td>UCL (Target value)</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>1</td>
<td>F</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>2</td>
<td>M</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>2</td>
<td>F</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>3</td>
<td>M</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>3</td>
<td>F</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>4</td>
<td>M</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>4</td>
<td>F</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>5</td>
<td>M</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>5</td>
<td>F</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>6</td>
<td>M</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>6</td>
<td>F</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>7</td>
<td>M</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>7</td>
<td>F</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>8</td>
<td>M</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>8</td>
<td>F</td>
<td>3</td>
<td>10</td>
</tr>
<tr>
<td>9</td>
<td>M</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>9</td>
<td>F</td>
<td>3</td>
<td>10</td>
</tr>
<tr>
<td>10</td>
<td>M</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td>10</td>
<td>F</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>11</td>
<td>M</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>11</td>
<td>F</td>
<td>3</td>
<td>10</td>
</tr>
<tr>
<td>12</td>
<td>M</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>12</td>
<td>F</td>
<td>3</td>
<td>10</td>
</tr>
</tbody>
</table>
Targeted Bar Chart

Definition

A targeted bar chart consists of a grid and some vertical or horizontal columns (bars), each of which contains a target value represented by a reference line. Each column represents quantitative data.

*Figure A1.27* Example of a Targeted Bar Chart Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

<table>
<thead>
<tr>
<th>Data best suited for</th>
<th>A targeted bar chart helps the user to quickly compare the values of different categories, as well as compare the level of performance across different categories based on a specified target.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target audience</td>
<td>This indicator type is appropriate for all user audiences. Most people find this indicator type familiar and easy to interpret. Associating the bars in the chart to a target and range enables the user to quickly see the performance of each category.</td>
</tr>
<tr>
<td>Data aggregation support</td>
<td>This indicator type averages the applicable indicator data.</td>
</tr>
<tr>
<td>Range support</td>
<td>A range is required.</td>
</tr>
<tr>
<td>Alert support</td>
<td>Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.</td>
</tr>
</tbody>
</table>
Link support

This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support

• Data filter support: This indicator type can be used as either a source or target indicator.

• Interactive highlighting support: This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

General Settings

The General Settings section provides controls that support the following tasks:

• “Specify the Height and Width of the Indicator” on page 75
• “Change the Indicator Type” on page 76
• “Change the Indicator Data to Use” on page 77
• “Change the Range to Use” on page 77
• “Specify the Graph Style” on page 76
• “Specify the Sort Order” on page 78

Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range value</td>
<td>market_share_vs_target</td>
</tr>
<tr>
<td>X-axis value</td>
<td>Product</td>
</tr>
<tr>
<td>Bar value</td>
<td>avg_market_share</td>
</tr>
<tr>
<td>Target value</td>
<td>avg_market_share_target</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to Product)</td>
</tr>
<tr>
<td>Y-axis title</td>
<td>Set to Avg Market Share</td>
</tr>
<tr>
<td>Hide axes when zoomed</td>
<td>This setting is selected.</td>
</tr>
</tbody>
</table>
You can customize the following display settings for this indicator:

- (Required) From the **Range value** list, select the value to which you want to apply the defined range intervals.

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

- (Required) From the **Bar value** list, select the value that you want to use for the bars that are drawn in the indicator.

- From the **Target value** list, select the value that you want to use for the target markers in the indicator.

- In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

- In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

- Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to **Revenue** and you select **Scale X axis**, the X-axis title is displayed as **Revenue (millions)**.

- Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to **Revenue** and you select **Scale Y axis**, the Y-axis title is displayed as **Revenue (millions)**.

- Select **Hide axis tick labels** if you want to hide the axis tick labels when a user zooms out the view of an indicator. When the user zooms in, the axis tick labels reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- Select **Hide axes when zoomed out** if you want to hide the axes when a user zooms out the view of an indicator. When the user zooms in, the axes reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- Select **Horizontal** if you want to change the orientation of the bars and labels from vertical to horizontal. This option is particularly useful if you have long labels that are difficult to read when they are displayed vertically.

- From the **Row group by** list, select the value that you want to use to group rows of data. If you do not want to group the rows, select **(none)**.

- From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select **(none)**.

- From the **X-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.
• From the **Y-axis format** list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select **(none)**. When set to **(none)**, the indicator uses the format that is used in the data source.

• From the **X-axis labels** list, select the style to apply to the data labels that are used on the X axis. Depending on your labels, one style might be easier to read than others.

**Sample Data Structure**

To create a targeted bar chart, you must provide one variable (X-axis value) and three measures (bar value, target value, and range value). Optionally, you can specify additional variables by using the **Row group by** and **Column group by** lists.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Market Share versus Target (Range value)</th>
<th>Product (X-axis value)</th>
<th>Average Market Share (Bar value)</th>
<th>Average Market Share Target (Target value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sprocket</td>
<td>0.16</td>
<td>0.27</td>
<td>—0.11</td>
</tr>
<tr>
<td>Widget</td>
<td>0.13</td>
<td>0.07</td>
<td>0.06</td>
</tr>
<tr>
<td>Wocket</td>
<td>0.16</td>
<td>0.17</td>
<td>—0.01</td>
</tr>
</tbody>
</table>

**Tile Chart**

**Definition**

A tile chart (also called a treemap) is a graphical representation that uses nested rectangles to display hierarchical data.
For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

**Usage Information**

| Data best suited for | A tile chart uses rectangular tiles to represent data. The tiles vary according to size to represent a value for different categories. Because the size of each tile is proportional to the value, not to the category, it provides a clear overview of the status or contribution of each category. For example, suppose that each tile represents rice production in different countries. The tile for Vietnam would be quite large compared to the tile for the US, even though the US is a larger country. Because of this difference, the business user can clearly see who the top contributors are in a single map. Tile charts are therefore most effective when there is a need to display a lot of information in a small amount of space. The individual tiles can also be colored to represent ranges. |
| Not suited for | Tile charts are not intended to show detailed information. Although tooltips and legends can reveal details of each tile, the main point is for the business user to get a rough sense of top contributors (good or bad), or patterns such as the largest categories for a given map. |
Some audiences might not be familiar with tile charts, and can find them difficult to interpret. It is a good idea to check whether your audience is familiar with this indicator type before using it.

This indicator type averages the applicable indicator data.

A range is required.

Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.

This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

This indicator type can be used as either a source or target indicator. This indicator type can be used as either a source or target indicator.

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range value</td>
<td>Amount per Operation</td>
</tr>
<tr>
<td>Tile by</td>
<td>Country</td>
</tr>
</tbody>
</table>
You can customize the following display settings for this indicator:

- *(Required)* From the **Range value** list, select the value to which you want to apply the defined range intervals.
- *(Required)* From the **Tile by** list, select the value to use to create individual tiles in the indicator.
- *(Required)* From the **Tile size** list, select the value to use to size individual tiles in the indicator.
- Select **Show labels** if you want the indicator to include the labels for each map portion or pie slice.

**Sample Data Structure**

To create a tile chart, you must provide one variable (tile by) and two measures (tile size and range value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Country (Tile by)</th>
<th>Amount (Tile size)</th>
<th>Amount Per Operation (Range value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>3,604.20</td>
<td>300.35</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>1,145.00</td>
<td>229.0</td>
</tr>
<tr>
<td>Indonesia</td>
<td>4,225.00</td>
<td>469.44</td>
</tr>
</tbody>
</table>

**Vector Plot**

**Definition**

A vector plot is a plot consisting of directed line segments.
Figure A1.29 Example of a Vector Plot Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

Usage Information

Data best suited for
Vector plots can only be used when direction and magnitude are both present in the data and must be displayed. Unlike a line plot, a vector plot can display how two variables interact with each other over a third variable that identifies each individual vector. Note that vector plots are less commonly used in business and more commonly used when dealing with physics and earth sciences. However, vector plots can be used to represent certain aspects of business. For example, a vector plot can be used to determine the direction of sales, given the resources and effort that went into making a sale.

Target audience
Most users will be unfamiliar with this indicator type. Do not use this indicator type unless you are sure your audience understands how to interpret it, or you provide instructions about how to interpret it.

Data aggregation support
This indicator type does not aggregate the indicator data.

Range support
A range is required.

Alert support
Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.
Link support

This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support

• **Data filter support**: This indicator type can be used as either a source or target indicator.
  
  • **Interactive highlighting support**: This indicator type can be used as either a source or target indicator.

  For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support

Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

**General Settings**

The General Settings section provides controls that support the following tasks:

• “Specify the Height and Width of the Indicator” on page 75
• “Change the Indicator Type” on page 76
• “Change the Indicator Data to Use” on page 77
• “Change the Range to Use” on page 77
• “Specify the Sort Order” on page 78

**Display Settings**

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range value</td>
<td>SALES_PER_CHANG</td>
</tr>
<tr>
<td>Point label</td>
<td>PROD_CAT</td>
</tr>
<tr>
<td>X-axis start value</td>
<td>SALES_NOV</td>
</tr>
<tr>
<td>Y-axis start value</td>
<td>PROFIT_PER_NOV</td>
</tr>
<tr>
<td>X-axis end value</td>
<td>SALES_DEC</td>
</tr>
<tr>
<td>Y-axis end value</td>
<td>PROFIT_PER_DEC</td>
</tr>
<tr>
<td>X-axis title</td>
<td>Set to Sales</td>
</tr>
</tbody>
</table>

*Note: The Scale X axis setting adds the label (thousands) to the title.*
You can customize the following display settings for this indicator:

- (Required) From the **Range value** list, select the value to which you want to apply the defined range intervals.

- (Required) From the **Point label** list, select the value that you want to use to label the data points.

- (Required) From the **X-axis start value** list, select the first value to use on the X axis.

- (Required) From the **Y-axis start value** list, select the first value to use on the Y axis.

- (Required) From the **X-axis end value** list, select the last value to use on the X axis.

- (Required) From the **Y-axis end value** list, select the last value to use on the Y axis.

- In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

- In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

- Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to **Revenue** and you select **Scale X axis**, the X-axis title is displayed as **Revenue (millions)**.

- Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to **Revenue** and you select **Scale Y axis**, the Y-axis title is displayed as **Revenue (millions)**.

- Select **Hide axes when zoomed out** if you want to hide the axes when a user zooms out the view of an indicator. When the user zooms in, the axes reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- Select **Hide axis tick labels** if you want to hide the axis tick labels when a user zooms out the view of an indicator. When the user zooms in, the axis tick labels reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- Click **Hide vector arrows** if you want to hide the arrow heads in the indicator.

- From the **Row group by** list, select the value that you want to use to group rows of data. If you do not want to group the rows, select **none**.

- From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select **none**.
• From the X-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

• From the Y-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

Sample Data Structure

To create a vector plot, you must provide one variable (point label) and five measures (range value, X-axis start value, X-axis end value, Y-axis start value, and Y-axis end value).

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Product Category (Point label)</th>
<th>Sales (November) (X-axis start value)</th>
<th>Sales (December) (X-axis end value)</th>
<th>Profit (November) (Y-axis start value)</th>
<th>Profit (December) (Y-axis end value)</th>
<th>Sales per Change (Range value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Running — Jogging</td>
<td>$49,444</td>
<td>$42,698</td>
<td>56.32%</td>
<td>54.27%</td>
<td>-13.64%</td>
</tr>
<tr>
<td>Swim Sports</td>
<td>$19,901</td>
<td>$50,056</td>
<td>58.70%</td>
<td>60.56%</td>
<td>151.53%</td>
</tr>
<tr>
<td>Winter Sports</td>
<td>$127,347</td>
<td>$397,544</td>
<td>56.73%</td>
<td>59.59%</td>
<td>212.17%</td>
</tr>
</tbody>
</table>

Waterfall Chart

Definition

A waterfall chart is a visualization of the sequence of positive and negative values that arrive at a final value. This chart is also called a progressive bar chart.
**Figure A1.30** Example of a Waterfall Chart Indicator

For a sample of the indicator data that was used to create this indicator, see “Sample Data Structure” for this indicator.

### Usage Information

**Data best suited for** Waterfall charts are most often used when representing account or revenue data. They display how an initial value is increased or decreased by intermediate values. Use waterfall charts when you want to display details about how a value was increased or decreased, as well as the beginning and ending values.

Waterfall charts work well for the following scenarios:

- illustrating cash flow over time, including beginning and ending balances
- financial data

**Not suited for** Do not use waterfall charts for the following scenarios:

- when the end results are the only items that are of importance
- when displaying point-in-time data

**Target audience** Most users will be unfamiliar with this indicator type. It is not recommended that you use this indicator type unless you are sure your audience knows how to interpret it, or you provide instructions on how to interpret it.
Data aggregation support
This indicator type averages the applicable indicator data.

Range support
A range is required.

Alert support
Alerts are supported. For information, see Chapter 13, “Customizing Alerts,” on page 119.

Link support
This indicator type can be used to define a link or as the destination of a link. For more information about defining an indicator with a hyperlink, see “Adding Links to Indicators or Other Content” on page 112.

Interaction support
- Data filter support: This indicator type can be used as either a source or target indicator.
- Interactive highlighting support: This indicator type can be used as either a source or target indicator.

For more information, see “Adding Interactions between Indicators” on page 104.

Filter multiple items support
Filtering multiple items is supported. For more information, see “Supporting Multiple Selections in a Filtered Data Interaction” on page 111.

General Settings

The General Settings section provides controls that support the following tasks:

- “Specify the Height and Width of the Indicator” on page 75
- “Change the Indicator Type” on page 76
- “Change the Indicator Data to Use” on page 77
- “Change the Range to Use” on page 77
- “Specify the Graph Style” on page 76
- “Specify the Sort Order” on page 78

Display Settings

The following display settings are used in the preceding figure. For more information, see “Sample Data Structure” for this indicator.

<table>
<thead>
<tr>
<th>Display Setting</th>
<th>Selection Used for Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range value</td>
<td>Color</td>
</tr>
<tr>
<td>X-axis value</td>
<td>Account</td>
</tr>
<tr>
<td>Difference</td>
<td>Value</td>
</tr>
<tr>
<td>X-axis title</td>
<td>&lt;blank&gt; (defaults to <strong>Account</strong>)</td>
</tr>
</tbody>
</table>
You can customize the following display settings for this indicator:

- (Required) From the **Range value** list, select the value to which you want to apply the defined range intervals.

- (Required) From the **X-axis value** list, select the column in your data that you want to use for the X-axis value in the indicator. When you view your indicator data, the columns in the data set are described by the values in the **Column Name** column. The selections available in the **X-axis value** list are all of the values in the **Column Name** column.

- (Required) From the **Difference** list, select the value to use for each bar. This value is an offset of the ending value for the previous bar in a waterfall chart indicator.

- In the **X-axis title** field, type the title to use for the X axis in the indicator. If you do not specify a title, the value that you selected from the **X-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale X axis**, a measurement label is added to the title.

- In the **Y-axis title** field, type the title to use for the Y axis in the indicator. If you do not specify a title, the value that you selected from the **Y-axis value** list is used by default. If you do not want a title, type a space in the field. If you select **Scale Y axis**, a measurement label is added to the title.

- Select **Scale X axis** if you want to scale that axis. When you make this selection, a measurement label is added to the X-axis title if the data is numeric. For example, if the X-axis title is set to *Revenue* and you select **Scale X axis**, the X-axis title is displayed as *Revenue (millions)*.

- Select **Scale Y axis** if you want to scale that axis. When you make this selection, a measurement label is added to the Y-axis title if the data is numeric. For example, if the Y-axis title is set to *Revenue* and you select **Scale Y axis**, the Y-axis title is displayed as *Revenue (millions)*.

- Select **Hide axes when zoomed out** if you want to hide the axes when a user zooms out the view of an indicator. When the user zooms in, the axes reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- Select **Hide axis tick labels** if you want to hide the axis tick labels when a user zooms out the view of an indicator. When the user zooms in, the axis tick labels reappear. Select this setting to avoid visual clutter when the view is zoomed out.

- From the **Row group by** list, select the value that you want to use to group rows of data. If you do not want to group the rows, select **(none)**.

- From the **Column group by** list, select the value that you want to use to group columns of data. If you do not want to group the columns, select **(none)**.

- From the **Difference axis format** list, select the format to apply to the data on the Difference axis.
• From the X-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

• From the Y-axis format list, select the format that you want to apply to the data on that axis. If you do not want to specify a format, select (none). When set to (none), the indicator uses the format that is used in the data source.

**Sample Data Structure**

To create a waterfall chart, you must provide a minimum of three data columns: range value, X-axis value, and difference.

*Note:* The Order column is included for managing the order of the X-axis values. Order column is the selection in the Sort by field for this example indicator. For more information, see “Specify the Sort Order” on page 78.

The following data sample is associated with the figure previously shown. Underneath each column heading is its associated display setting.

<table>
<thead>
<tr>
<th>Account (X-axis value)</th>
<th>Value (Difference)</th>
<th>Color (Range value)</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Revenue</td>
<td>420,000</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Services Revenue</td>
<td>210,000</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Fixed Costs</td>
<td>–170,000</td>
<td>–1</td>
<td>3</td>
</tr>
<tr>
<td>Variable Costs</td>
<td>–140,000</td>
<td>–1</td>
<td>4</td>
</tr>
<tr>
<td>Total</td>
<td>–320,000</td>
<td>0</td>
<td>5</td>
</tr>
</tbody>
</table>

*Note:* The indicator source data includes a Total column as an observation. However, that observation is not used in the waterfall chart. The total is excluded in order to force the data to start from the X axis. The waterfall chart cannot provide the total automatically, so you must use this workaround.
Appendix 2

Indicator Types that Aggregate Data

Some indicator types in SAS BI Dashboard aggregate data. The following table lists these indicator types and the type of aggregation, sum or average, that they use.

<table>
<thead>
<tr>
<th>Indicator Type</th>
<th>How the Data is Aggregated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar chart with bullet</td>
<td>Average</td>
</tr>
<tr>
<td>Bar chart with reference lines</td>
<td>Average</td>
</tr>
<tr>
<td>Clustered bar chart</td>
<td>Sum</td>
</tr>
<tr>
<td>Interactive summary and bar chart</td>
<td>Average¹</td>
</tr>
<tr>
<td>Interactive summary and targeted bar chart</td>
<td>Average¹</td>
</tr>
<tr>
<td>Pie chart</td>
<td>Sum</td>
</tr>
<tr>
<td>Simple bar chart</td>
<td>Sum</td>
</tr>
<tr>
<td>Spark table</td>
<td>You can configure a spark table indicator to aggregate data, and you can select the type of aggregation to use for each column in the spark table. See “Spark Table” on page 227.</td>
</tr>
<tr>
<td>Stacked bar chart</td>
<td>Sum</td>
</tr>
<tr>
<td>Targeted bar chart</td>
<td>Average</td>
</tr>
<tr>
<td>Tile chart</td>
<td>Average</td>
</tr>
<tr>
<td>Waterfall chart</td>
<td>Average</td>
</tr>
</tbody>
</table>

¹ The detail bar chart always averages the data. However, you can select the aggregation method to use when summarizing data for the summary chart in the indicator. The default selection is Sum.
Appendix 3

Valid Date Formats for Information Maps

Use the following formats when specifying a date.

<table>
<thead>
<tr>
<th>Format</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>DAY</td>
<td>You can pass values such as <em>August 04, 2010, Aug 04, 2010, or 04AUG2010</em>. No other format is accepted.²</td>
</tr>
<tr>
<td>WEEK</td>
<td>You can pass a value such as <em>Week 31 2010</em>.³</td>
</tr>
<tr>
<td>MONTH</td>
<td>You can pass a value such as <em>Jan 2009</em>. No other format is accepted.³</td>
</tr>
<tr>
<td>QUARTER</td>
<td>You can pass a value such as <em>3rd quarter 2010</em>.³</td>
</tr>
<tr>
<td>YEAR</td>
<td>You can pass a value such as <em>2010</em>.</td>
</tr>
</tbody>
</table>

² The easiest way to ensure that the proper date format is accepted is to use a prompt with a format of DATE9 or MMDDYY10.

³ There is no SAS format that can create such a value. You must create a custom data set or use SQL to create a data column with the correct format. Then, pass this data column as the source in the interaction or link.
aggregation  
the act or process of grouping data by using an operation that produces a statistic such as a sum, average, minimum, or maximum.

alert  
an automatic notification of an electronic event that is of interest to the recipient.

Alerts portlet  
a portlet that lists alert messages that have been issued to the user.

bar chart  
a chart that consists of a grid and some vertical or horizontal columns (bars). Each column represents quantitative data.

cache  
a small, fast memory area that holds recently accessed data. The cache is designed to speed up subsequent access to the same data.

certainty  
in association analyses, a measure of the strength of the association. In the rule A \rightarrow B, certainty is the percentage of times that event B occurs after event A occurs.

data set  
See “SAS data set”.

filter  
a set of specified criteria that are applied to data in order to identify the subset of data for a subsequent operation, such as continued processing.

forecast  
a numerical prediction of a future value for a time series.

format  
See “SAS format”.

indicator (service level indicator, SLI)  
a representation of the performance of an objective that is being measured, expressed as a numeric value.
information map
a collection of data items and filters that provides a user-friendly view of a data source. When you use an information map to query data for business needs, you do not have to understand the structure of the underlying data source or know how to program in a query language.

key performance indicator (KPI)
a type of measurement that evaluates the success of an organization or of an activity in which it engages. Success might be defined as the periodic achievement of one or more operational goals, or in terms of progress toward strategic goals. Results are usually measured at regular intervals, against threshold values that are carefully selected according to their importance.

KPI
See “key performance indicator”.

layout
a generic term for a rectangular container that lays out the positions and sizes of its child components.

legend
a visual key to graphic elements in a graph. The legend consists of values, value descriptions, labels, and often a frame.

log
See “log file”.

log file (log)
a file in which information about software processing is recorded as the processing occurs. A log file typically includes error messages and warning messages, but it can also include informational messages and statistics such as the number of records that have been processed or the amount of CPU time that a program required.

needle plot
a plot in which data points are connected by a vertical line that connects to a horizontal baseline. The baseline intersects the 0 value, or the minimum value on the vertical axis.

pie chart
a circular chart that is divided into slices by radial lines. Each slice represents the relative contribution of each part to the whole.

proxy server
a special type of web server that acts as an agent to represent a server to a client and to represent the client to the server. Usually a proxy is used as a cache of items that are available on other servers when those other servers are slower or more expensive to access.

range
a defined interval with distinct lower and upper boundaries that serve to collect or distinguish data values. Ranges are combined to form range sets.

reference line
a vertical line on a plot that indicate whether the values of plotting variables are less than, greater than, or equal to a particular value.
**SAS data set (data set)**

A file whose contents are in one of the native SAS file formats. There are two types of SAS data sets: SAS data files and SAS data views.

**SAS format (format)**

A type of SAS language element that is used to write or display data values according to the data type: numeric, character, date, time, or timestamp.

**SAS Stored Process (stored process)**

A SAS program that is stored on a server and defined in metadata, and which can be executed by client applications.

**service level indicator**

See “indicator”.

**SLI**

See “indicator”.

**stored process**

See “SAS Stored Process”.

**tile chart**

See “treemap”.

**treemap (tile chart)**

A graph that represents the relative values of data by using nested rectangular areas. The color or pattern of each area represents the value of one measure in the query. The size of each area represents the value of the another measure in the query.

**Uniform Resource Locator (URL)**

A character string that is used by a web browser or other software application to access or identify a resource on the Internet or on an intranet. The resource could be a web page, an electronic image file, an audio file, a JavaServer page, or any other type of electronic object. The full form of a URL specifies which communications protocol to use for accessing the resource, as well as the directory path and filename of the resource.

**URL**

See “Uniform Resource Locator”.
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