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# **SAS® BI Dashboard 3.1**

User's Guide

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**SAS® BI Dashboard 3.1: User's Guide**

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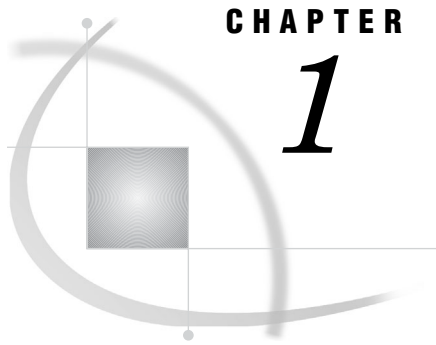
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## CHAPTER

## 1

# Introduction

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*Overview* 1

*Audience* 1

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## Overview

The SAS BI Dashboard enables users to employ dashboards to monitor key performance indicators that convey how well an organization is performing. Dashboards 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. End users can customize how information appears on their personal dashboards.

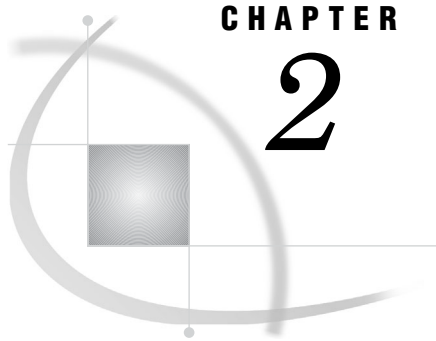
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## Audience

As is true for many SAS®9 applications, the users of the SAS BI Dashboard can be grouped based on their skills and on whether they play a role in defining and managing the system. The following table shows the three types of users of the SAS BI Dashboard:

User	Description	Example
Dashboard user	The ultimate audience of dashboards. This role views dashboards and uses them as a launching point for further exploration and action.	Executives and employees presented with dashboards as part of their intranet home page.
Dashboard administrator	This role defines indicators and dashboards. This role is responsible for setting user access to various dashboards and for controlling the extent to which dashboard users can personalize the dashboards. This role might also be responsible for extending the functionality of the SAS BI Dashboard by creating custom code.	A business manager with some SAS technical knowledge, or a SAS consultant involved in the initial implementation or major overhauls of the SAS BI Dashboard who works with outside consultants and corporate developers.
IT support personnel	This role installs the SAS BI Dashboard and maintains its setup, configuration, and administration.	An IT person who is responsible for supporting application deployment and maintenance on an organization's computer network.

This guide is intended for SAS BI Dashboard administrators and dashboard users.



## CHAPTER

## 2

## Getting Started

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## The SAS Information Delivery Portal

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### Overview

The SAS BI Dashboard is accessed from within the SAS Information Delivery Portal. This guide assumes that you are familiar with the SAS Information Delivery Portal. If you are not, see the online Help.

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### Open the Portal and Log On

To open the SAS Information Delivery Portal, open your Web browser and point it to the portal's URL address. (To obtain the URL, contact your portal administrator.)

To identify yourself to the portal, you must log on with your user name and password. (If you do not have a user name and password, contact your system administrator to obtain them.)

The logon procedure varies depending on how your organization has installed the portal. Use either the Portal logon procedure or the Web server logon procedure, as appropriate.

## Portal Logon Procedure

Some organizations use the portal's logon feature, as follows:

- 1 Open your browser and point to the portal's URL.  
Either a public page or the portal's logon page appears.
- 2 If a public page appears, click **Log On** in the banner.
- 3 On the logon page, enter your **User Name** and **Password**.
- 4 Click **Log On**.  
Your personal portal opens.

## Web Server Logon Procedure

In some organizations, logging on to a Web server is sufficient to identify yourself to the portal. The Web server logon procedure is different in each organization. After you have logged on to the Web server, just point your browser to the portal's URL.  
Your personal portal opens.

---

## Create a Page and Add It to Your Navigation Bar

To create a new page and add it to your navigation bar:

- 1 Click **Options ► Add**.  
The Add Pages to Profile page appears.


- 2 On the **Create** tab, enter descriptive information about the page:

<b>Name</b>	A short name that will appear in the page's tab in the navigation bar.
<b>Description</b>	A short description that will appear with the page title in search results.
<b>Keywords</b>	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 standard list of keywords and use these keywords consistently. △

**Page rank**      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 with equal rank are listed in the order in which they were created.

*Note:* You can choose to override page ranks by explicitly defining the order of pages. 

**Location (group) and Share type**      These fields appear only if you are a group content administrator. In these fields, you can specify a group with which the page is to be shared and specify the share type.

3 Click **Add**.

A message appears, indicating that a new page was added.

4 Click **Done**.

---

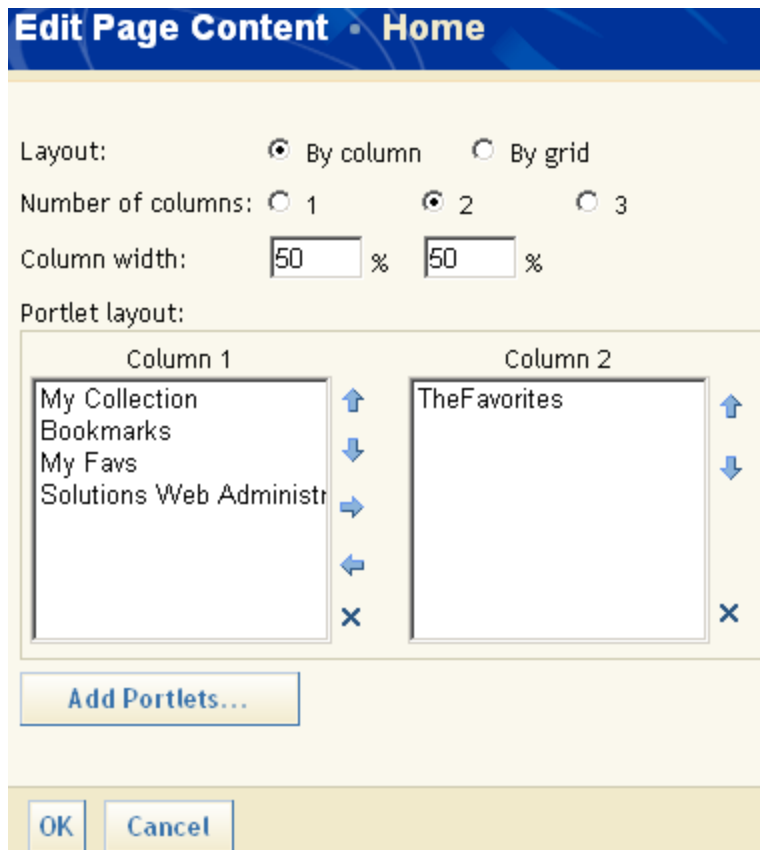
## Add a SAS BI Dashboard Portlet to a Page

To add a SAS BI Dashboard portlet to a page:

1 Navigate to the page that you want to add the portlet to.

2 Click **Options ► Edit Content**.

The Edit Page Content page appears.



**Edit Page Content - Home**

Layout:      ☒ By column      ☐ By grid

Number of columns:      ☐ 1      ☒ 2      ☐ 3

Column width:       %       %

Portlet layout:

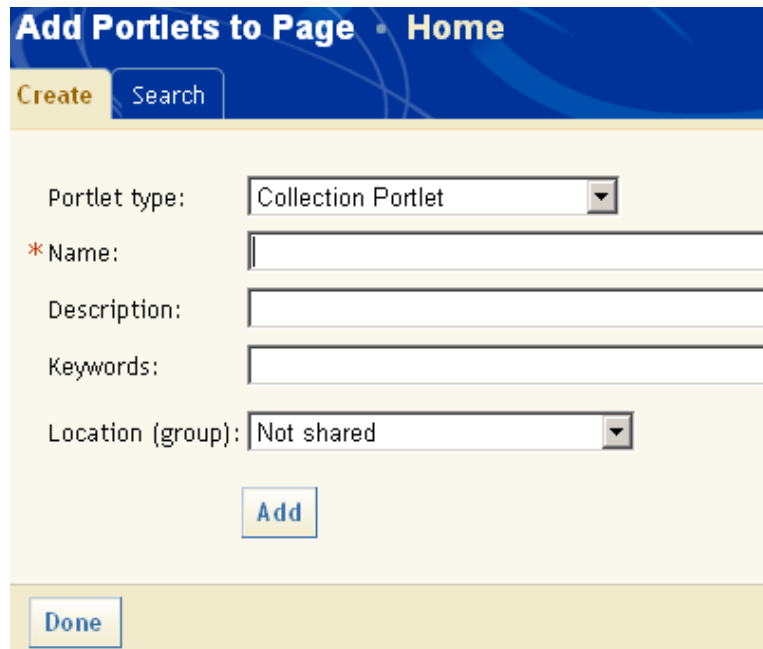
Column 1	Column 2
My Collection	TheFavorites
Bookmarks	
My Favs	
Solutions Web Administr	

**Add Portlets...**

**OK**      **Cancel**

**3 Click Add Portlets.**

The Add Portlets to Page page appears.



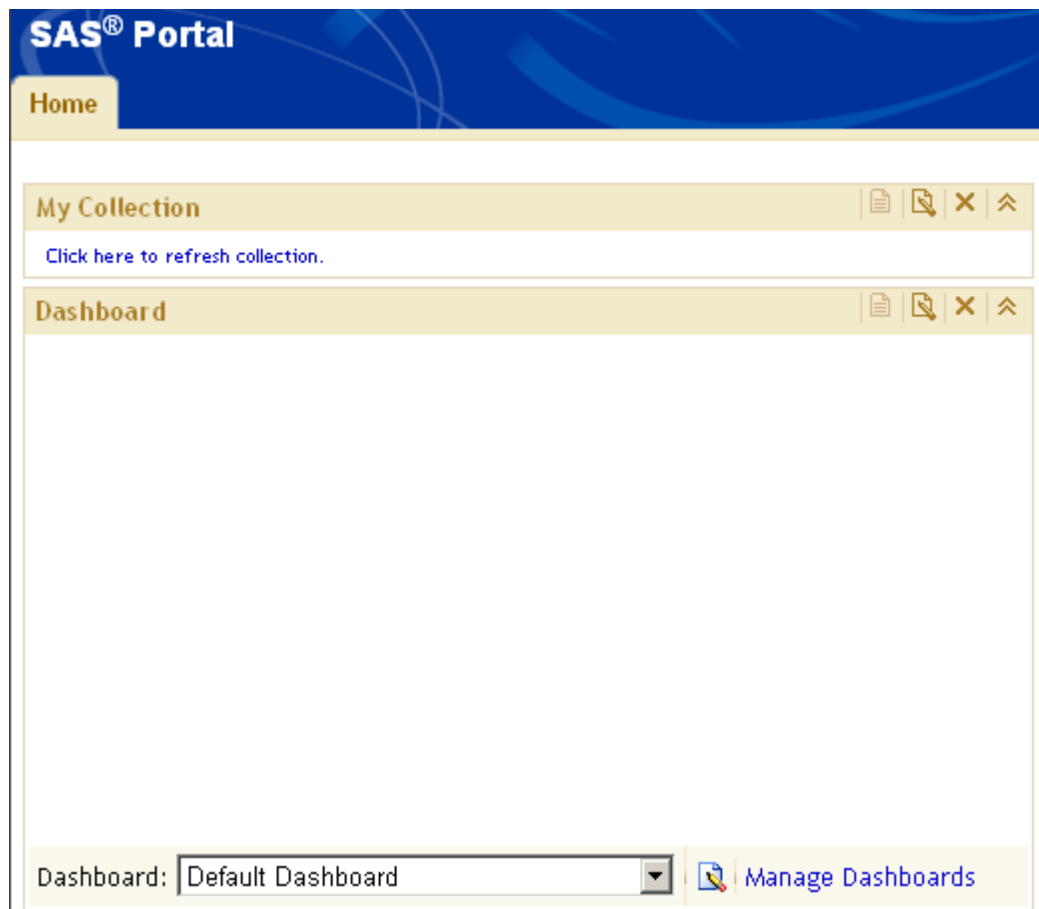
The screenshot shows the 'Add Portlets to Page' interface. At the top, there is a blue header with the text 'Add Portlets to Page' and a breadcrumb 'Home'. Below the header, there are two buttons: 'Create' (highlighted in orange) and 'Search'. The main form area has a light yellow background and contains the following fields:

- Portlet type:** A dropdown menu currently showing 'Collection Portlet'.
- \*Name:** A text input field.
- Description:** A text input field.
- Keywords:** A text input field.
- Location (group):** A dropdown menu currently showing 'Not shared'.

Below these fields is a blue 'Add' button. At the bottom of the form is a 'Done' button.

- 4** From the **Portlet type** drop-down list, select **SAS BI Dashboard**.
- 5** Type the name for the portlet and, if desired, the description and keywords.
- 6** If you are a group content administrator, select a group with which the portlet is to be shared from the **Location (group)** drop-down list.
- 7** Click **Add**, and then **Done**.
- 8** On the Edit Page Content page, click **OK**.

The original page is displayed, with the new portlet added.




---

## Select a Dashboard

To select a dashboard, select one from the **Dashboard** drop-down list in the SAS BI Dashboard portlet.

This list includes dashboards created by your organization and sample dashboards that are distributed with the SAS BI Dashboard if the installer chose to install and configure them.

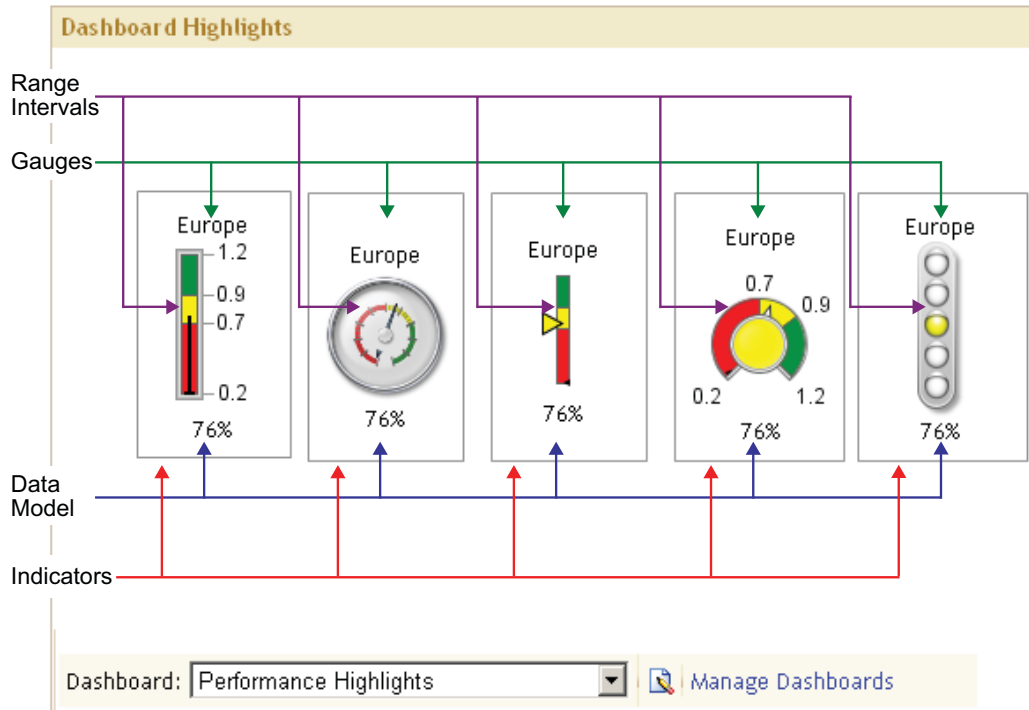
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## Creating a Dashboard

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### Overview

A *dashboard* is a container that has a collection of one or more *indicators*. A dashboard is displayed in a portlet, which is displayed on a page within the SAS Information Delivery Portal. Here is an example of a dashboard and its components in a portlet:

**Display 2.1** Dashboard and Its Components in a Portlet

Four components are required to create and display dashboard graphs within the portal:

- the model, which defines the data source for the dashboard graphs. A model must be created before an indicator can be defined.
- the range, which defines the criteria against which KPIs will be measured. Each interval of values in this range determines the color that is displayed in the indicator. Ranges must be created before an indicator can be defined.
- the indicator, which defines the display settings, image types, and links for all metrics displayed in a dashboard. An indicator must be created before a dashboard can be defined.
- the dashboard, which is a collection of indicators to display.

## The Model

The model defines the data source and how to access the data within the data source. Access to three types of data sources is supplied with the SAS BI Dashboard:

- SQL/JDBC, which can read any SAS data set
- IMAP, which can access SAS tables and OLAP cubes
- scorecard, which can read scorecard values directly from SAS Strategic Performance Management

*Note:* The SAS BI Dashboard administrator can add access to other data sources. △

## The Range

The range defines the measurement intervals by which a metric is evaluated, such as: below target, on target, and above target. The dashboard administrator can define

up to ten intervals. Each segment is assigned a user-selected color that is displayed when a metric falls within that particular segment.

---

## The Indicator

The indicator defines the following information:

- the data source (which model to use)
- the range settings (which range definition to use)
- the data that is displayed (single metric or multiple metrics)
- the way that the data displayed (a dynamic or static gauge, a graph, or a table)
- the underlying hypertext links (what happens when the indicator is clicked—for example, another dashboard opens, a report opens, or a stored process runs)
- the parameters (end-user permission settings and the display size for the indicator)

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## The Dashboard

The dashboard contains a list of indicators displayed in the desired order.

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# Lists

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## Overview

Lists appear in many places in the SAS BI Dashboard. Here are the tasks that you perform on lists:

- Scroll through a list.
- Delete one or more items in a list.

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## Scroll Through a List

To scroll through a list, click one of these icons:



Move to the first page.



Move to the previous page.




Move to the next page.




Move to the last page.

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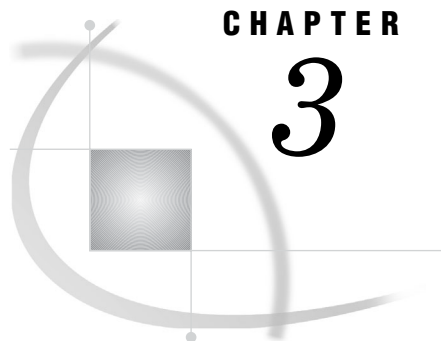
## Delete One or More Items in a List

To delete a single item, click the action menu  that is next to the item and select **Delete**.

To delete multiple items:

- 1 In the last column, select the check box that is next to the item.
- 2 To select all items, select the check box at the top of the last column.  
The check box that is next to each item is selected.
- 3 At the top of the last column, click the action menu  and select **Delete**.





## Data Models

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### Overview

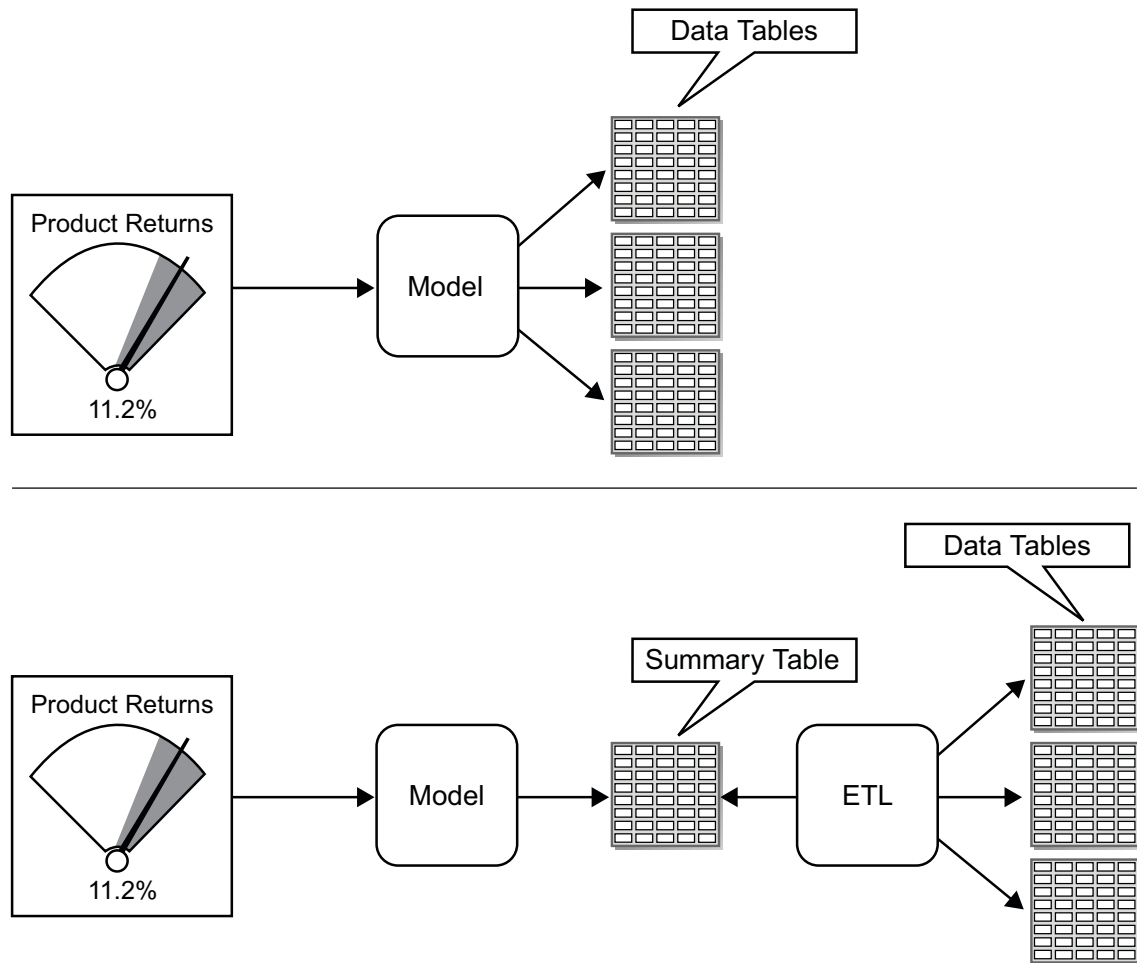
The SAS BI Dashboard uses data models to define data that is used in indicators. The data can come from different sources, such as SAS Information Maps, SAS data sets, or an SQL database. Before you create a dashboard, you must understand how to create a data model.

When you plan a data model, consider the kinds of display types that will be used with the data model. Also consider the required appearance of the desired end result. For example, KPIs appear best with a data model that produces summarized data with a limited number of data rows. A data model with significant amounts of detailed data, when used for KPI displays, causes the SAS BI Dashboard to try to produce one KPI graphic representation for each row of data in the data model. Other display types, such as the bar with reference lines, automatically summarize the data. In this case, it might be appropriate to use a data model that produces a larger number of data rows.

In all cases, create a query so that it executes quickly. A single slow query will slow the entire dashboard. Even when a query returns only a single row of data, if it must first join tables that each contain thousands of rows of data, the query won't perform well.

A good practice is to summarize data within the query or model level and not allow the display type to perform the summary. For a SAS Information Map, you can control aggregation by the data items that are selected in the data model editor, similar to its use within SAS Web Report Studio.

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 SAS Information Map. The first illustration that follows shows the SAS BI Dashboard model 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 data model then uses this summarized table.

**Display 3.1** Illustration of the Two Methods of Summarization

The first method is easier to set up and might result in more timely data, but the second method is more adjustable and will probably be more scalable. You can employ a similar strategy when creating SAS Information Maps that will be used by the SAS BI Dashboard data models.

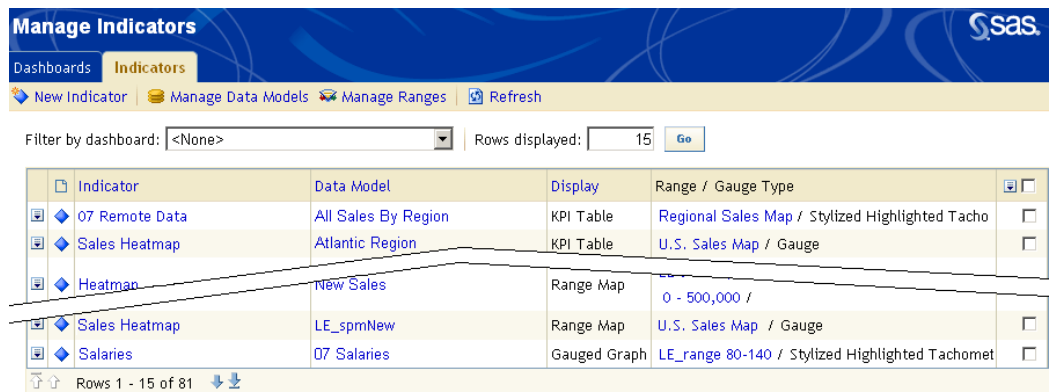
## Manage Data Models

To manage data models:

- 1 In the SAS BI Dashboard portlet, click **Manage Dashboards**.





*Note:* If you do not see **Manage Dashboards**, then you do not have access permission to manage dashboards. If you need to manage dashboards, contact your SAS BI Dashboard system administrator. △

The Manage Indicators page appears.












**Manage Indicators**

Dashboards   **Indicators**

 New Indicator    Manage Data Models    Manage Ranges    Refresh

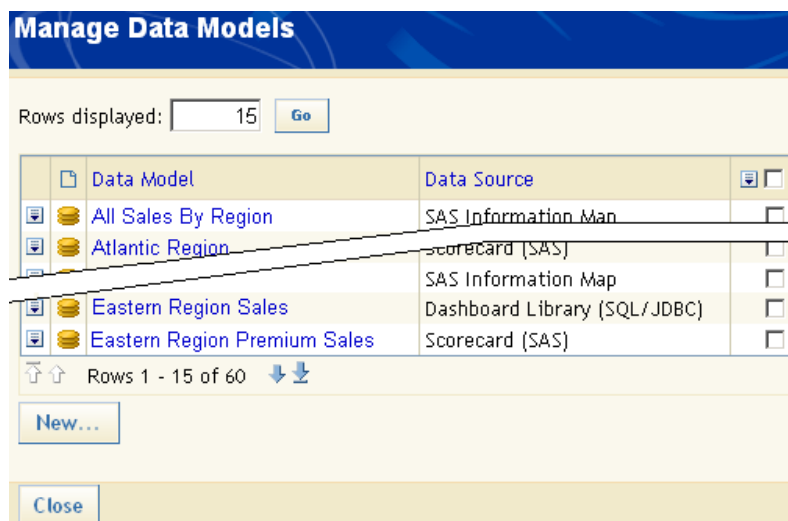
Filter by dashboard:    Rows displayed:

	Indicator	Data Model	Display	Range / Gauge Type	
	07 Remote Data	All Sales By Region	KPI Table	Regional Sales Map / Stylized Highlighted Tacho	<input type="checkbox"/>
	Sales Heatmap	Atlantic Region	KPI Table	U.S. Sales Map / Gauge	<input type="checkbox"/>
	Heatman	New Sales	Range Map	0 - 500,000 /	<input type="checkbox"/>
	Sales Heatmap	LE_spmNew	Range Map	U.S. Sales Map / Gauge	<input type="checkbox"/>
	Salaries	07 Salaries	Gauged Graph	LE_range 80-140 / Stylized Highlighted Tachomet	<input type="checkbox"/>

Rows 1 - 15 of 81    








**2 Click **Manage Data Models**.**



The Manage Data Models page appears.



**Manage Data Models**

Rows displayed:

	Data Model	Data Source	
	All Sales By Region	SAS Information Man	<input type="checkbox"/>
	Atlantic Region	Scorecard (SAS)	<input type="checkbox"/>
	Eastern Region Sales	SAS Information Map	<input type="checkbox"/>
	Eastern Region Premium Sales	Dashboard Library (SQL/JDBC)	<input type="checkbox"/>
		Scorecard (SAS)	<input type="checkbox"/>

Rows 1 - 15 of 60    

**3 To specify the number of rows to display on the page, type a number in the **Rows displayed** field, and click **Go**.**

**4 Scroll through the list.**

For more information, see “Scroll Through a List” on page 9.

**5 (Optional) Create or edit a data model .**


**6 To change the sort order, click a column heading.**

**7 (Optional) Delete one or more data models from the list.**

For more information, see “Delete One or More Items in a List” on page 9.

## Create or Edit a Data Model

To create or edit a data model:

*Note:* You can also create or edit a data model when you create or edit an indicator. For more information, see “Create or Edit an Indicator” on page 28. 

**1 In the SAS BI Dashboard portlet, click **Manage Dashboards**.**

**Note:** If you do not see **Manage Dashboards**, then you do not have access permission to manage dashboards. If you need to manage dashboards, contact your SAS BI Dashboard system administrator. △

The Manage Indicators page appears.

Indicator	Data Model	Display	Range / Gauge Type	
07 Remote Data	All Sales By Region	KPI Table	Regional Sales Map / Stylized Highlighted Tacho	<input type="checkbox"/>
Sales Heatmap	Atlantic Region	KPI Table	U.S. Sales Map / Gauge	<input type="checkbox"/>
Heatmap	New Sales	Range Map	0 - 500,000 /	<input type="checkbox"/>
Sales Heatmap	LE_spmNew	Range Map	U.S. Sales Map / Gauge	<input type="checkbox"/>
Salaries	07 Salaries	Gauged Graph	LE_range 80-140 / Stylized Highlighted Tachomet	<input type="checkbox"/>

**2 Click **Manage Data Models**.**

The Manage Data Models page appears.

Data Model	Data Source	
All Sales By Region	SAS Information Man	<input type="checkbox"/>
Atlantic Region	Scorecard (SAS)	<input type="checkbox"/>
Eastern Region Sales	SAS Information Map	<input type="checkbox"/>
Eastern Region Premium Sales	Dashboard Library (SQL/JDBC)	<input type="checkbox"/>
	Scorecard (SAS)	<input type="checkbox"/>

**3 To create a data model, click **New**.**

The New Data Model page appears.

**4 To edit a data model, click the name of the data model.**

5 Do one of the following:

- Define a dashboard library (SQL/JDBC) data source. For more information, see “Define a Dashboard Library (SQL/JDBC) Data Source” on page 18.
- Define a SAS Information Map data source. For more information, see “Define a SAS Information Map Data Source” on page 16.
- Define a scorecard data source. For more information, see “Define a Scorecard Data Source” on page 19.

## Defining a Data Source

When you define a data source, part of the information that you specify is the display attributes for each data column that is retrieved from the data source by a query or an information map.

Here is an explanation of the fields:

**Property** The name of the data column. You cannot modify this value.

Here is how **Property** appears in each type of display:

Bar and trend	Gauged graph	Graph	KPI	KPI table	Range map
Used as the default value for <b>Get name from</b> , <b>Get label from</b> , and <b>Field name</b> .					

**Get name from** The data column that contains the name that is displayed on a KPI gauge or graph.

Here is how **Get name from** appears in each type of display:

Bar and trend	Gauged graph	Graph	KPI	KPI table	Range map
Displayed to the left of each gauge.	For line and bar graphs, displayed as the category for a given value.	Displayed above each gauge.		Displayed as a tooltip.	

**Get label from** The data column that contains the formatted value that is displayed. This format can be a simple numeric value of a label.

A SQL query does not require this field. To create a formatted label at the bottom of a gauge, create the label as a formatted string in the SQL query, and then define that formatted string as the **Get label from** attribute.

Here is how **Get label from** appears in each type of display:

Bar and trend	Gauged graph	Graph	KPI	KPI table	Range map
Displayed to the right of each gauge.	For line and bar graphs, displayed as the category for a given value.	Displayed below each gauge.		Displayed in the value column.	Displayed next to each data point.

#### Get hyperlink from

The data column that contains hyperlinks.

Here is how **Get hyperlink from** appears in each type of display:

Bar and trend	Gauged graph	Graph	KPI	KPI table	Range map
Hyperlinks embedded in gauges or individual data points in graphs.					

#### Field name

The text that replaces the value retrieved for **Get name from**.

Here is how **Field name** appears in each type of display:

Bar and trend	Gauged graph	Graph	KPI	KPI table	Range map
Not used.	Displayed as the axis label.	Not used.		Displayed as the column heading.	Displayed as the axis label.

When you define a dashboard library (SQL/JDBC) data source or a scorecard data source, you create a query that retrieves data from the data source. After you create the query, you submit the query for validation. If the query is correct, data source column names are available in a list named **Available**. If the query is incorrect, the list is empty.

If the query is incomplete or incorrect, it is stored so that you can edit it later.

## Define a SAS Information Map Data Source

You define a SAS Information Map data source when you create or edit a data model or create or edit an indicator. For more information, see “Create or Edit a Data Model” on page 13 and “Create or Edit an Indicator” on page 28.

To define a SAS Information Map data source:

- 1 In the **Name** field on the New Data Model page or the Data Model Properties page, type the name of the data source that you want to appear in the list of data models.
- 2 Next to the **Data source** field, click **Select** and select **SAS Information Map**.  
The fields to define a SAS Information Map data source appear.
- 3 Next to the **SAS Information Map** field, click **Select**.  
The list of SAS Information Maps appears for the default repository.
- 4 From the drop-down list at the top, select a repository.  
The table is populated with the SAS Information Maps in the selected repository.
- 5 In the **Name** column, select a SAS Information Map.  
If the SAS Information Map is based on an OLAP cube, the dimensions of the OLAP cube are displayed.

- 6 (Optional) In the **SAS Information Map** field, type the name of the SAS Information Map.
- 7 If the SAS Information Map is based on an OLAP cube, do the following:
  - a For each dimension in the OLAP cube, assign a role for the dimension by selecting a value from the drop-down list that is next to the dimension.
  - b To order the dimensions, click the name of a dimension, and then move it up or down by clicking one of the arrows that are next to the dimensions.
  - c When the roles are set, click **Update Mappings**.
- 8 Move data point properties between the **Available** and **Selected** lists by using the arrows between the lists.
- 9 To order the data point properties in the **Selected** list, select a data point property, and then move it up or down by clicking one of the arrows that are below the list.

10 To associate a data point property with data columns in the data source:

- a In the **Selected** list, select a data point property.
- b From the **Get name from** drop-down list, select a data column in the data source that contains the name of the data point property.  
If the data source contains a Name data column, this data column is selected automatically for all data point properties.
- c From the **Get label from** drop-down list, select a data column in the data source that contains the label for the data point property.  
If you need a complicated label, such as one that concatenates data fields and static text, create a data column in the data source to store the concatenation. Then select that data column from the **Get label from** drop-down list.
- d From the **Get hyperlink from** drop-down list, select a data column in the data source that contains the hyperlink for the data point property.
- e In the **Field name** field, type the name to display for the data point property in the column header in the KPI table display.

*Note:* The KPI display ignores this value. △

## Define a Dashboard Library (SQL/JDBC) Data Source

You define a dashboard library (SQL/JDBC) data source when you create or edit a data model or create or edit an indicator. For more information, see “Create or Edit a Data Model” on page 13 and “Create or Edit an Indicator” on page 28.

Dashboard Library (SQL/JDBC) Query

Query:

Available:

Selected:

Association

Property:

Get name from:

Get label from:

Get hyperlink from:

Field name:

To define a dashboard library (SQL/JDBC) data source:

- 1 In the **Name** field on the New Data Model page or the Data Model Properties page, type the name of the data source that you want to appear in the list of data models.
- 2 Next to the **Data source** field, click **Select** and select **Dashboard Library (SQL/JDBC)**.  
The fields to define a dashboard library (SQL/JDBC) data source appear.
- 3 In the **Query** field, type the query code.
- 4 Click **Submit**.
- 5 Move data point properties between the **Available** and **Selected** lists by using the arrows between the lists.
- 6 To order the data point properties in the **Selected** list, select a data point property, and then move it up or down by clicking one of the arrows that are below the list.
- 7 To associate a data point property with data columns in the data source:
  - a In the **Selected** list, select a data point property.
  - b From the **Get name from** drop-down list, select a data column in the data source that contains the name of the data point property.  
If the data source contains a Name data column, this data column is selected automatically for all data point properties.
  - c From the **Get label from** drop-down list, select a data column in the data source that contains the label for the data point property.  
If you need a complicated label, such as one that concatenates data fields and static text, create a data column in the data source to store the concatenation. Then select that data column from the **Get label from** drop-down list.
  - d From the **Get hyperlink from** drop-down list, select a data column in the data source that contains the hyperlink for the data point property.
  - e In the **Field name** field, type the name to display for the data point property in the column header in the KPI table display.

*Note:* The KPI display ignores this value. △

---

## Define a Scorecard Data Source

You define a SAS scorecard data source when you create or edit a data model or create or edit an indicator. For more information, see “Create or Edit a Data Model” on page 13 and “Create or Edit an Indicator” on page 28.

Scorecard (SAS) Query

Scorecard server URL:  (http://<server>:<port>/)

Date format:

Name format:

Value format:

Query:

Available:

Selected:

Association

Property:

Get name from:

Get label from:

Get hyperlink from:

Field name:

To define a SAS scorecard data source:

- 1 In the **Name** field on the New Data Model page or the Data Model Properties page, type the name of the data source that you want to appear in the list of data models.
- 2 Next to the **Data source** field, click **Select** and select **Scorecard (SAS)**.

The fields to define a scorecard data source appear.

- 3 In the **Scorecard server URL** field, type the URL to the location of SAS Strategic Performance Management in the form *http://<server>:<port>/*.
- 4 From the **Date format** drop-down list, select a date format.

When you create the query, all dates must be in this format.

- 5 In the **Name format** field, type the name to appear above the indicator in a dashboard.

You can type any text. However, keywords supply certain information from SAS Strategic Performance Management. When the query is run, the keywords are replaced with values from SAS Strategic Performance Management for the cell specified in the query. These are the keywords:

<b>TEMPLATE</b>	The name of the template on which the scorecard that is associated with the queried cell is based.
<b>PROJECT</b>	The name of the project in which the scorecard that is associated with the queried cell is located.
<b>SCORECARD</b>	The name of the scorecard that is associated with the queried cell.

<b>ELEMENTTYPE</b>	The name of the type of element that is associated with the queried cell.
<b>ELEMENT</b>	The name of the element that is associated with the queried cell.
<b>METRICATTRIBUTE</b>	The name of the metric attribute that is associated with the queried cell.
<b>DATE</b>	The date on which the metric attribute value is based.
<b>METRIC_VALUE</b>	The value of the metric attribute that is associated with the queried cell.

The keywords are case-insensitive.

Use a plus (+) between a literal and a keyword and between keywords. For example, if the queried cell is located in the scorecard Shoe Sales in the project East Coast, **SCORECARD + for the + PROJECT + region** produces **Shoe Sales for the East Coast region**.

You can apply a SAS format such as **dollar8.2(METRIC\_VALUE)** to any text.

- 6 In the **Value format** field, type the value to appear below the indicator in a dashboard.

This field accepts the same text, keywords, and formats as the **Name format** field.

- 7 In the **Query** field, type the query that specifies a cell within SAS Strategic Performance Management from which to retrieve values, and then click **Submit**.

Use a vertical bar (|) to separate the parts of the query that specify a cell. Here is the general format to specify a cell:

```
template | project | scorecard | element_type | element | metric_attribute | date
| URL
```

*URL* specifies the hyperlink that appears in the indicator in a dashboard. *URL* is optional.

If you don't include *URL*, one is automatically generated from SAS Strategic Performance Management. The target of the automatically generated URL is either the directive for the queried cell or the scorecard that contains the queried cell.

If you do include *URL*, the string is used exactly as you type it.

Use two vertical bars (||) to separate individual queries as in the following example:

```
tmplt1 | prj1 | score1 | elemtype1 | elem1 | metattr1 | date1 | <url> ||
tmplt2 | prj2 | score2 | elemtype2 | elem2 | metattr2 | date2
```

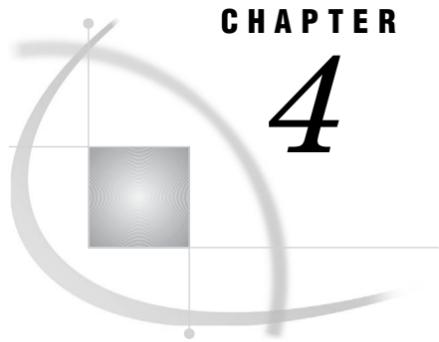
- 8 Move data point properties between the **Available** and **Selected** lists by using the arrows between the lists.
- 9 To order the data point properties in the **Selected** list, select a data point property, and then move it up or down by clicking one of the arrows that are below the list.
- 10 To associate a data point property with data columns in the data source:
  - a In the **Selected** list, select a data point property.
  - b From the **Get name from** drop-down list, select a data column in the data source that contains the name of the data point property.

If the data source contains a Name data column, this data column is selected automatically for all data point properties.
  - c From the **Get label from** drop-down list, select a data column in the data source that contains the label for the data point property.

If you need a complicated label, such as one that concatenates data fields and static text, create a data column in the data source to store the concatenation. Then select that data column from the **Get label from** drop-down list.

- d From the **Get hyperlink from** drop-down list, select a data column in the data source that contains the hyperlink for the data point property.
- e In the **Field name** field, type the name to display for the data point property in the column header in the KPI table display.

*Note:* The KPI display ignores this value. △



CHAPTER

4

Ranges

Manage Ranges

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Create or Edit a Range

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Start to Create or Edit a Range

24

Define the Range

26

Manage Ranges

To manage ranges:

- 1 In the SAS BI Dashboard portlet, click **Manage Dashboards**.

*Note:* If you do not see **Manage Dashboards**, then you do not have access permission to manage dashboards. If you need to manage dashboards, contact your SAS BI Dashboard system administrator. △

The Manage Indicators page appears.

Manage Indicators

Dashboards

Indicators

New Indicator

Manage Data Models

Manage Ranges

Refresh

Filter by dashboard:

<None>

Rows displayed:

15

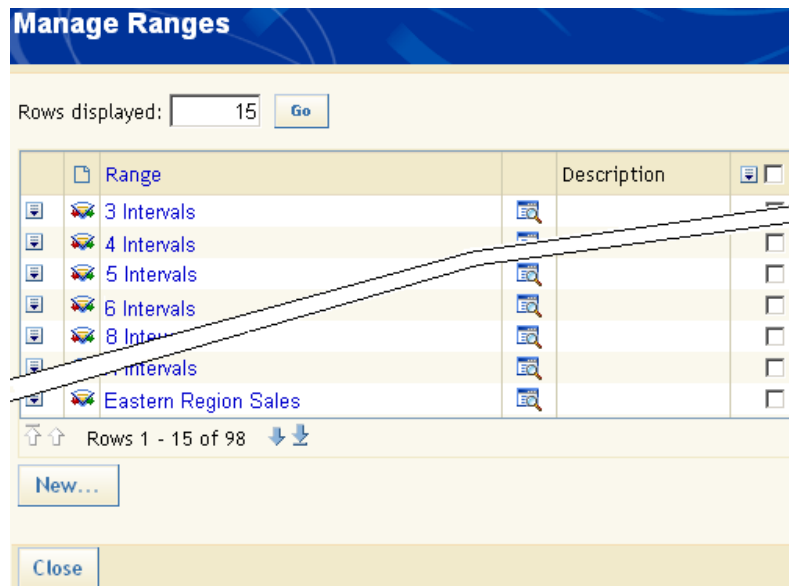
Go


Indicator	Data Model	Display	Range / Gauge Type	
07 Remote Data	All Sales By Region	KPI Table	Regional Sales Map / Stylized Highlighted Tacho	<input type="checkbox"/>
Sales Heatmap	Atlantic Region	KPI Table	U.S. Sales Map / Gauge	<input type="checkbox"/>
Heatmap	New Sales	Range Map	0 - 500,000 /	
Sales Heatmap	LE_spmNew	Range Map	U.S. Sales Map / Gauge	<input type="checkbox"/>
Salaries	07 Salaries	Gauged Graph	LE_range 80-140 / Stylized Highlighted Tachomet	<input type="checkbox"/>

Rows 1 - 15 of 81

- 2 Click **Manage Ranges**.

The Manage Ranges page appears.



- 3 To specify the number of rows to display on the page, type a number in the **Rows displayed** field, and click **Go**.
- 4 (Optional) Create or edit a range .
- 5 To change the sort order, click **Range** in the column heading.
- 6 Scroll through the list.  
For more information, see “Scroll Through a List” on page 9.
- 7 To preview a range, click  next to the range.
- 8 (Optional) Delete one or more ranges from the list.  
For more information, see “Delete One or More Items in a List” on page 9.

---

## Create or Edit a Range

---


### Start to Create or Edit a Range

To create or edit a range from within the SAS BI Dashboard portlet:

- 1 In the portlet, click **Manage Dashboards**.

*Note:* If you do not see **Manage Dashboards**, then you do not have access permission to manage dashboards. If you need to manage dashboards, contact your SAS BI Dashboard system administrator. △

The Manage Indicators page appears.

**Manage Indicators** 

Dashboards **Indicators**

[New Indicator](#) [Manage Data Models](#) [Manage Ranges](#) [Refresh](#)

Filter by dashboard: <None> Rows displayed: 15 [Go](#)

Indicator	Data Model	Display	Range / Gauge Type	
07 Remote Data	All Sales By Region	KPI Table	Regional Sales Map / Stylized Highlighted Tacho	<input type="checkbox"/>
Sales Heatmap	Atlantic Region	KPI Table	U.S. Sales Map / Gauge	<input type="checkbox"/>
Heatmap	New Sales	Range Map	0 - 500,000 /	<input type="checkbox"/>
Sales Heatmap	LE_spmNew	Range Map	U.S. Sales Map / Gauge	<input type="checkbox"/>
Salaries	07 Salaries	Gauged Graph	LE_range 80-140 / Stylized Highlighted Tachomet	<input type="checkbox"/>

Rows 1 - 15 of 81

**2 Click **Manage Ranges**.**

The Manage Ranges page appears.

**Manage Ranges**

Rows displayed: 15 [Go](#)

Range	Description	
3 Intervals		<input type="checkbox"/>
4 Intervals		<input type="checkbox"/>
5 Intervals		<input type="checkbox"/>
6 Intervals		<input type="checkbox"/>
8 Intervals		<input type="checkbox"/>
10 Intervals		<input type="checkbox"/>
Eastern Region Sales		<input type="checkbox"/>

Rows 1 - 15 of 98

[New...](#)

[Close](#)

**3 To create a range, click **New**.**

The New Range page appears.

**New Range**

General Information

\* Range name:

Description:

Range Definition

Enter an Interval, click Add Interval and the intervals are calculated for you.

Interval:

Code Interval (For static gauges only)	Interval	Label	Color (For dynamic gauges only)	Delete

Asterisks (\*) will not display in dynamic gauges.



- 4 To edit a range, click the name of the range.

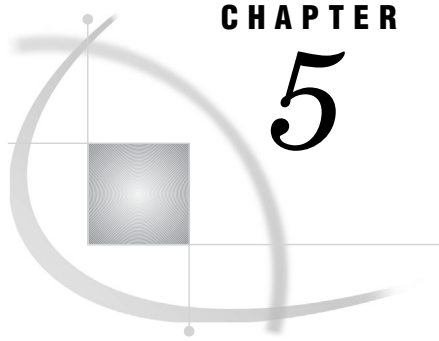
## Define the Range

To define the range:

- 1 To specify the name and description, type the name and description in the appropriate fields on the New Range page or the Range Properties page.
- 2 For each interval in the range, type the interval value in the **Interval** field, and click **Add Interval**.

The interval is added to the table of intervals. You can add the values in any order; the software will order them correctly in the table.

- 3 To define each interval:
  - a For a static gauge, in the **Code Interval** column, select a code interval from the drop-down list.  
The available intervals depend on the gauge.
  - b In the **Interval** column, select an operator from the drop-down list, and type a value in the adjacent field.
  - c In the **Label** column, type the label.
  - d For a dynamic gauge, in the **Color** column, click  and select a color.
  - e To delete an interval, click  next to the interval.
  - f To validate that the intervals are in the correct order after deleting an interval, click **Validate**.



## CHAPTER

## 5

## Indicators

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## Manage Indicators

To manage the indicators:

- 1 In the SAS BI Dashboard portlet, click **Manage Dashboards**.

*Note:* If you do not see **Manage Dashboards**, then you do not have access permission to manage dashboards. If you need to manage dashboards, contact your SAS BI Dashboard system administrator. △

The Manage Indicators page appears.

Indicator	Data Model	Display	Range / Gauge Type	
07 Remote Data	All Sales By Region	KPI Table	Regional Sales Map / Stylized Highlighted Tacho	<input type="checkbox"/>
Sales Heatmap	Atlantic Region	KPI Table	U.S. Sales Map / Gauge	<input type="checkbox"/>
Heatmap	New Sales	Range Map	0 - 500,000 /	<input type="checkbox"/>
Sales Heatmap	LE_spmNew	Range Map	U.S. Sales Map / Gauge	<input type="checkbox"/>
Salaries	07 Salaries	Gauged Graph	LE_range 80-140 / Stylized Highlighted Tachomet	<input type="checkbox"/>

- 2 To limit the indicators to those used by a specific dashboard, select a dashboard from the **Filter by dashboard** drop-down list on the Manage Indicators page.
- 3 To specify the number of rows to display on the page, type a number in the **Rows displayed** field, and click **Go**.
- 4 (Optional) Create or edit an indicator, manage data models, or manage ranges.
- 5 To change the sort order, click a column heading.
- 6 Scroll through the list.

For more information, see “Scroll Through a List” on page 9.

- 7 To view a data model, click the name of the data model.

For more information, see “Define a SAS Information Map Data Source” on page 16, “Define a Dashboard Library (SQL/JDBC) Data Source” on page 18, or “Define a Scorecard Data Source” on page 19.

- 8 To view a range, click the name of the range.

For more information, see “Define the Range” on page 26.

- 9 (Optional) Delete one or more indicators from the list.

For more information, see “Delete One or More Items in a List” on page 9.

- 10 To refresh the list, click **Refresh**.

## Create or Edit an Indicator

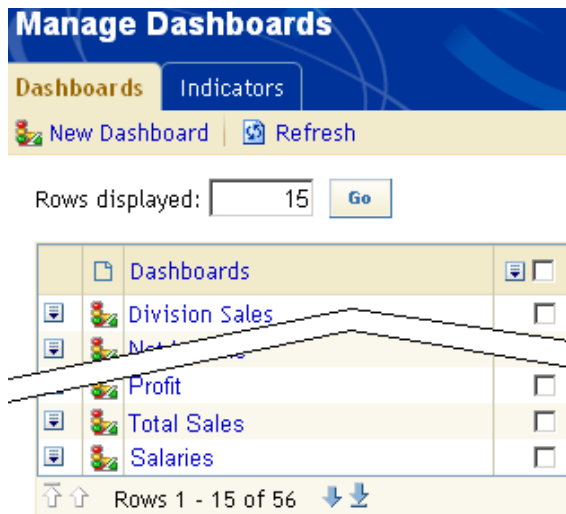
### Start to Create or Edit an Indicator

To start to create or edit an indicator from within the SAS BI Dashboard portlet:

- 1 In the portlet, click **Manage Dashboards**.

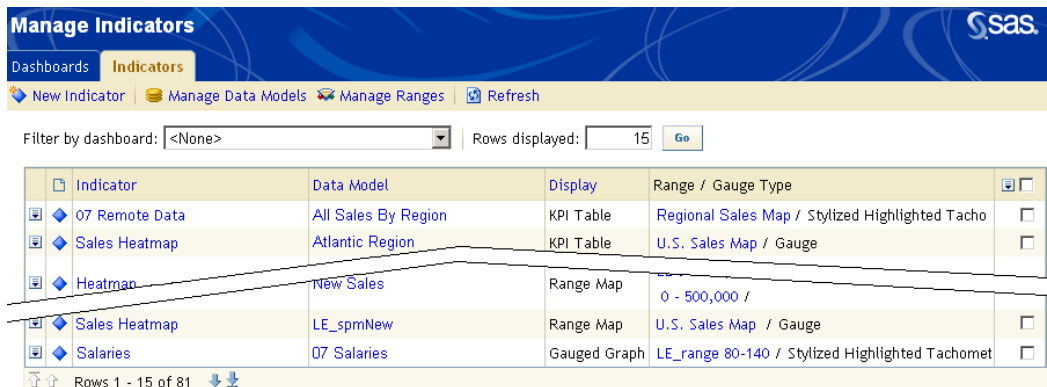
*Note:* If you do not see **Manage Dashboards**, then you do not have access permission to manage dashboards. If you need to manage dashboards, contact your SAS BI Dashboard system administrator. △

If you don’t have the access permission to manage indicators, the Manage Dashboards page appears.



*Note:* If you don't have the access permission to manage indicators, you cannot create or edit an indicator. If you need to create or edit an indicator, contact your SAS BI Dashboard system administrator. △

If you have the access permission to manage indicators, the Manage Indicators page appears.



- 2 To create an indicator, click **New Indicator** on the Manage Indicators page.  
The New Indicator page appears.

**New Indicator**

Indicator Links Display Configure

Name:

Data model:   

Display:

Display Settings

Definition name:

Range:   

Gauge type:  

Set the range data source properties.

Primary:

Secondary:

- 3 To edit an indicator, click the name of the indicator.

There are four remaining steps to create or edit an indicator:

- 1 Define the indicator.
- 2 Define the links.
- 3 Define the display.
- 4 Configure the indicator.

---

## Define the Indicator

- 1 To specify the name of the indicator, type the name in the **Name** field.
- 2 To use an existing data model, select one from the **Data model** drop-down list.
- 3 To edit the data model, click **Edit**.

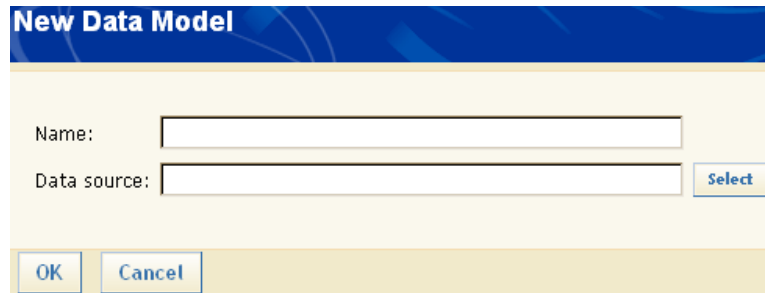
For more information, see the following:

- “Define a SAS Information Map Data Source” on page 16
- “Define a Dashboard Library (SQL/JDBC) Data Source” on page 18
- “Define a Scorecard Data Source” on page 19

- 4 To create a data model:

- a Click **New**.

The New Data Model page appears.



The image shows a dialog box titled "New Data Model". It has a blue header bar with the title in white. Below the header, there are two text input fields. The first is labeled "Name:" and the second is labeled "Data source:". To the right of the "Data source:" field is a button labeled "Select". At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

**b** Do one of the following:

- ☐ Define a dashboard library (SQL/JDBC) data source. For more information, see “Define a Dashboard Library (SQL/JDBC) Data Source” on page 18.
- ☐ Define a SAS Information Map data source. For more information, see “Define a SAS Information Map Data Source” on page 16.
- ☐ Define a scorecard data source. For more information, see “Define a Scorecard Data Source” on page 19.

**5** Do one of the following:

- ☐ Define a bar and trend display. For more information, see “Define a Bar and Trend Display” on page 37.
- ☐ Define a gauged graph display. For more information, see “Define a Gauged Graph Display” on page 38.
- ☐ Define a graph display. For more information, see “Define a Graph Display” on page 38.
- ☐ Define a range map display. For more information, see “Define a Range Map Display” on page 39.
- ☐ Define a KPI display. For more information, see “Define a KPI Display” on page 40.
- ☐ Define a KPI table display. For more information, see “Define a KPI Table Display” on page 41.

## Define the Links

- 1 Click the **Links** tab.

**New Indicator**

Indicator Links Display Configure

Hyperlink

Type: External Open in: This window

Link: Select...

Parameters

Parameter passing:

☒ Do not pass parameters

☐ Pass parameters to links that support parameters

Link Parameter Set


Click the Add Parameter button to set parameter links.

Add Parameter

OK Cancel

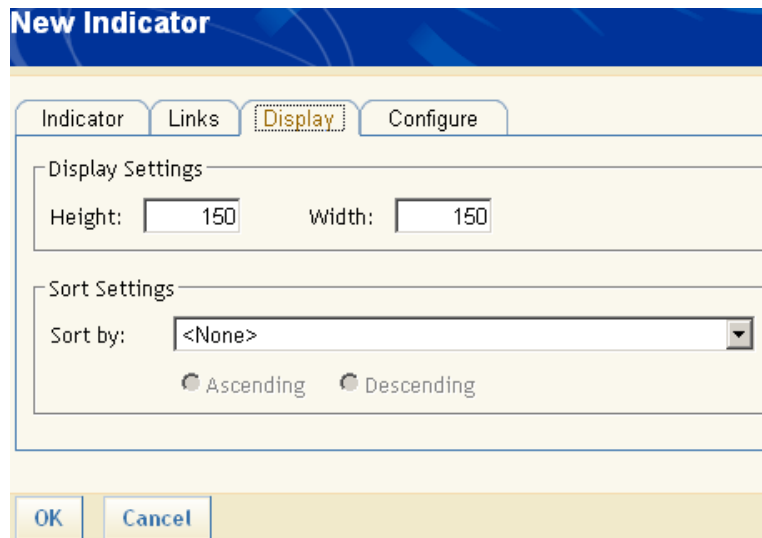
- 2 From the **Type** drop-down list, select the type of link.
- 3 From the **Open in** drop-down list, select a window in which to open the link target.
- 4 If you selected an external link, type the URL of the link in the **Link** field.
- 5 If you selected a type other than an external link, click **Select** next to the **Link** field and select an item.

The available choices depend on the type of link.

- 6 (Optional) To specify the parameters for a URL specified in the **Link** field that supports parameters:
  - a Select **Pass parameters to links that support parameters**.
  - b Click **Add Parameter**.  
The name and data point lookup controls appear.
  - c Type the name of the parameter, and then select the data point lookup associated with the parameter.
  - d Add as many parameters as needed.
  - e To delete a parameter, click  next to the parameter.

## Define the Display

- 1 Click the **Display** tab.

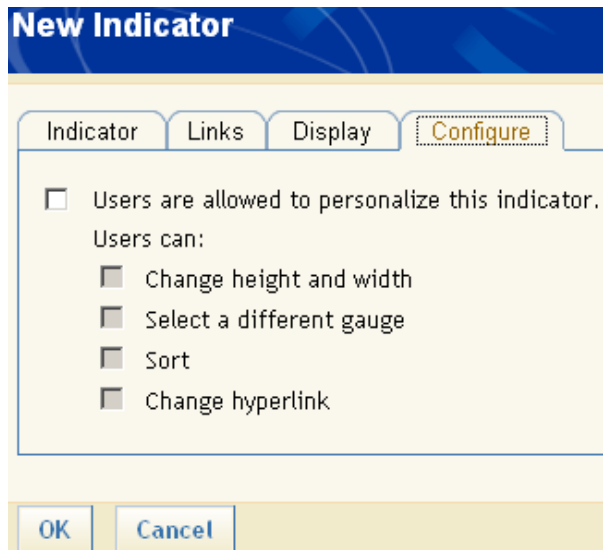


The screenshot shows the 'New Indicator' dialog box with the 'Display' tab selected. The 'Display Settings' section contains input fields for 'Height' and 'Width', both set to 150. The 'Sort Settings' section has a 'Sort by' dropdown menu set to '<None>' and two radio buttons for 'Ascending' and 'Descending', both of which are unselected. At the bottom are 'OK' and 'Cancel' buttons.

- 2 Type the height and width of the indicator.
- 3 Select the value to sort on and the sort method.

## Configure the Indicator

- 1 Click the **Configure** tab.



The screenshot shows the 'New Indicator' dialog box with the 'Configure' tab selected. A checkbox labeled 'Users are allowed to personalize this indicator.' is unchecked. Below it, the text 'Users can:' is followed by four sub-options, each with an unchecked checkbox: 'Change height and width', 'Select a different gauge', 'Sort', and 'Change hyperlink'. At the bottom are 'OK' and 'Cancel' buttons.

- 2 Choose whether to allow users to personalize the indicator and then which aspects that can be personalized.

See also  
 “Personalize an Indicator” on page 44















## Indicator Displays

### Overview of Display Types

#### Bar and Trend Display

The bar and trend display shows two sets of gauges and their corresponding values. The first column displays the name of the variable. The second column displays the first gauge (which is based on the primary and secondary values) and its corresponding value. The third column displays the second gauge (which is based on the primary trend) and its corresponding value.

Here is an example of a bar and trend display:

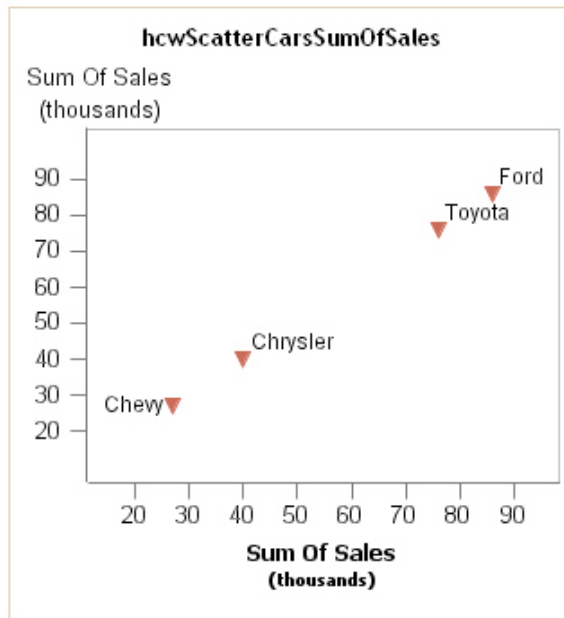
Sales Rep	Percent of Target	3 Month Tren
Alfred	 112.5	 69
Alice	 84	 56.5
Barbara	 98	 65.3
Carol	 102.5	 62.8
Henry	 102.5	 63.5
James	 83	 57.3
Jane	 84.5	 59.8

Although you could choose any two data series to represent the value and trend, this display is designed to display a value and a precalculated trend value. To produce the best visual representation possible, follow these guidelines:

- The gauge in the second column is best displayed as a bullet or slider. A bullet or a slider gauge also enables you to set a secondary value.
- The gauge in the third column is best displayed as a static indicator that does not occupy much space, such as an arrow.
- By default, the range intervals are displayed for a dynamic gauge. If the gauge is too narrow, clear the option **Display range intervals** when you select the gauge. For more information, see “Select a Gauge for an Indicator” on page 43.
- By default, gray scale ghosting is selected for a dynamic gauge. Gray scale ghosting displays only the color that the primary pointer is pointing to (the active color). Inactive colors appear as shades of gray. To display all colors, clear the option **Ghost** when you select the gauge.
- By default, the height for both of the gauges is 30 pixels. The width of the bar value is equal to the width of the gauge (the default width is 120 pixels and the height is 30 pixels). The trend gauge and value are both set to 40 pixels wide and 30 pixels high, neither of which can be changed.

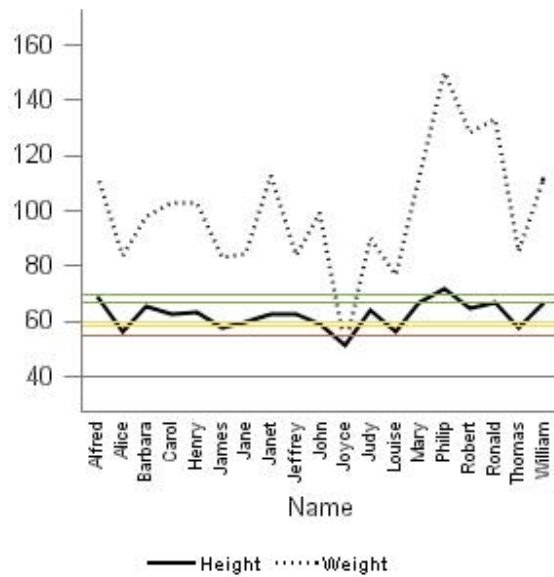
## Gauged Graph Display

Here is an example of a gauged graph display:



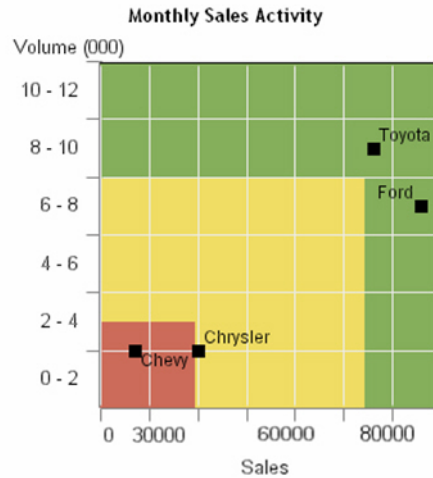
## Graph Display

Here is an example of a graph display:



## Range Map Display

Here is an example of a range map display:

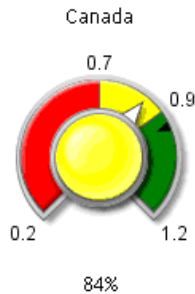


## KPI Display

The KPI display shows a single KPI or multiple KPIs.

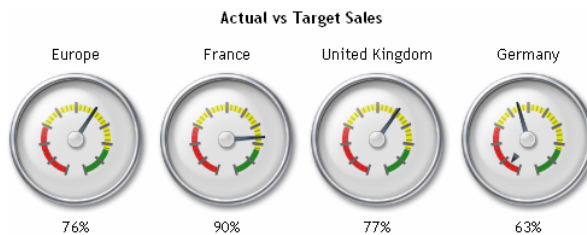
For a single KPI, the display shows the KPI associated with a single data value.

Here is an example of a single KPI display:



For multiple KPIs, the display shows one KPI for each data point that is in scope. For the best results, aggregate related KPIs through a single data model so that a single indicator configuration controls the display of all values.

Here is an example of a multiple KPI display:



## KPI Table Display

The KPI table display shows data points in a table form, with one gauge per table row.

The table column headings are the names contained in the first data point's properties. The software assumes that all properties in the same column have the same

name. Therefore, the underlying data model must contain descriptive field names. Only mapped properties are displayed in the KPI table.

Here is an example of a KPI table display:

Regional Sales KPIs				
Location	Performance		Actual	Target
Europe	80%	🟡	16%	20%
France	90%	🟡	18%	20%
United Kingdom	77%	🟡	10%	13%
Germany	63%	🔴	19%	30%

## Define a Bar and Trend Display

You define a bar and trend display when you create or edit an indicator. For more information, see “Create or Edit an Indicator” on page 28.

- 1 From the **Display** drop-down list on the New Indicator page or the Indicator Properties page, select **Bar and Trend**.

The controls to define a bar and trend display appear.

Display Settings

Definition

Definition name: Value

Range: Market Forecast Q1 Edit... New...

Gauge type: Dynamic Speedometer Select...

Set the range data source properties.

Primary: Age

Secondary: <None>

Definition

Definition name: Trend

Range: Market Forecast Q1 Edit... New...

Gauge type: Dynamic Speedometer Select...

Set the range data source properties.

Primary: Age

Secondary: <None>

- 2 Repeat these steps for each definition:

- a To use an existing range, select a range from the **Range** drop-down list.
- b To create or edit a range, click **New** or **Edit**.  
For more information, see “Define the Range” on page 26.
- c From the **Gauge type** drop-down list, select a type of gauge.
- d Select the primary range data source property.
- e Select the secondary range data source property, if the gauge supports it.

## Define a Gauged Graph Display

You define a gauged graph display when you create or edit an indicator. For more information, see “Create or Edit an Indicator” on page 28.

- 1 From the **Display** drop-down list on the New Indicator page or the Indicator Properties page, select **Gauged Graph**.

The controls to define a gauged graph display appear.

Display Settings

Height:  Width:

Graph type:

Bar value:

Axis format:

Column group by:

Row group by:

**Definition**

Definition name: VALUE

Range:  [Edit...](#) [New...](#)

Set the range data source properties.

Primary:

- 2 Type the height and width of the graph area.
- 3 From the **Graph type** drop-down list, select a type of graph, and then select values to be represented by the graph.

The types of values depend on the type of graph.

- 4 Select how to display each axis.

The number of axes depends on the type of graph.

- 5 Select values for the grouping of the columns and rows.
- 6 To use an existing range, select a range from the **Range** drop-down list.
- 7 To create or edit a range, click **New** or **Edit**.

For more information, see “Define the Range” on page 26.

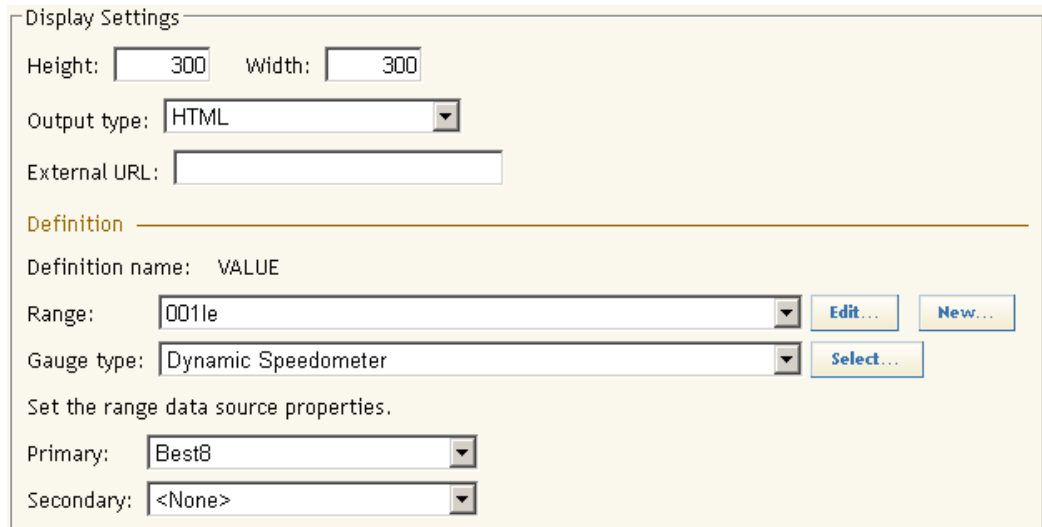
- 8 Select the primary range data source property.

## Define a Graph Display

You define a graph display when you create or edit an indicator. For more information, see “Create or Edit an Indicator” on page 28.

- 1 From the **Display** drop-down list on the New Indicator page or the Indicator Properties page, select **Graph**.

The controls to define a graph display appear.



The screenshot shows a 'Display Settings' dialog box with the following fields and controls:

- Height:** 300
- Width:** 300
- Output type:** HTML (dropdown menu)
- External URL:** (empty text field)
- Definition** (section header)
- Definition name:** VALUE
- Range:** 001le (dropdown menu) with **Edit...** and **New...** buttons
- Gauge type:** Dynamic Speedometer (dropdown menu) with a **Select...** button
- Set the range data source properties.**
- Primary:** Best8 (dropdown menu)
- Secondary:** <None> (dropdown menu)

- 2 Type the height and width of the graph area.
- 3 From the **Output type** drop-down list, select how to represent the indicator.
- 4 Type the external URL to associate with the indicator.
- 5 To use an existing range, select a range from the **Range** drop-down list.
- 6 To create or edit a range, click **New** or **Edit**.

For more information, see “Define the Range” on page 26.

- 7 From the **Gauge type** drop-down list, select a type of gauge.

You can also click **Select** to view the gauges graphically. For more information, see “Select a Gauge for an Indicator” on page 43.

- 8 Select the primary and secondary range data source properties.

---

## Define a Range Map Display

You define a range map display when you create or edit an indicator. For more information, see “Create or Edit an Indicator” on page 28.

- 1 From the **Display** drop-down list on the New Indicator page or the Indicator Properties page, select **Range Map**.

The controls to define a range map display appear.

Display Settings

Height:  Width:

Graph type:

X value:

Y value:

X axis format:

Y axis format:

Column group by:

Row group by:

---

**Definition**

Definition name: X\_VALUE

Range:

Set the range data source properties.

Primary:

---

**Definition**

Definition name: Y\_VALUE

Range:

Set the range data source properties.

Primary:

- 2 Type the height and width of the graph area.
- 3 From the **Graph type** drop-down list, select a type of graph, and then select values to be represented by the graph.  
The types of values depend on the type of graph.
- 4 Select how to display each axis.  
The number of axes depend on the type of graph.
- 5 Select values for the grouping of the columns and rows.
- 6 Repeat these steps for each definition:
  - a To use an existing range, select a range from the **Range** drop-down list.
  - b To create or edit a range, click **New** or **Edit**.  
For more information, see “Define the Range” on page 26.
  - c Select the primary range data source property.

---

## Define a KPI Display

You define a KPI display when you create or edit an indicator. For more information, see “Create or Edit an Indicator” on page 28.

- 1 From the **Display** drop-down list on the New Indicator page or the Indicator Properties page, select **KPI**.

The controls to define a KPI display appear.

Display Settings

Definition name: Title

Range: 001le Edit... New...

Gauge type: Dynamic Speedometer Select...

Set the range data source properties.

Primary: Best8

Secondary: <None>

2 To use an existing range, select a range from the **Range** drop-down list.

3 To create or edit a range, click **New** or **Edit**.

For more information, see “Define the Range” on page 26.

4 From the **Gauge type** drop-down list, select a type of gauge.

You can also click **Select** to view the gauges graphically. For more information, see “Select a Gauge for an Indicator” on page 43.

5 Select the primary range data source property.

6 Select the secondary range data source property, if the gauge supports it.

## Define a KPI Table Display

You define a KPI table display when you create or edit an indicator. For more information, see “Create or Edit an Indicator” on page 28.

1 From the **Display** drop-down list on the New Indicator page or the Indicator Properties page, select **KPI Table**.

The controls to define a KPI table display appear.

Display Settings

Definition name: Title

Range: 001le Edit... New...

Gauge type: Dynamic Speedometer Select...

Set the range data source properties.

Primary: Best8

Secondary: <None>

2 To use an existing range, select a range from the **Range** drop-down list.

3 To create or edit a range, click **New** or **Edit**.

For more information, see “Define the Range” on page 26.

4 From the **Gauge type** drop-down list, select a type of gauge.

You can also click **Select** to view the gauges graphically. For more information, see “Select a Gauge for an Indicator” on page 43.

5 Select the primary range data source property.

6 Select the secondary range data source property, if the gauge supports it.

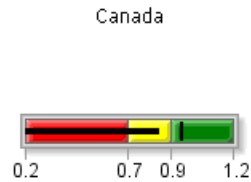
---

## Dynamic Gauges

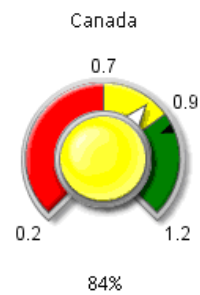
In addition to the static gauges that are displayed in the software, you can choose a gauge that is dynamic. A dynamic gauge is drawn by the software based on the type of gauge and the data values in the gauge.

Here are examples of the dynamic gauges:

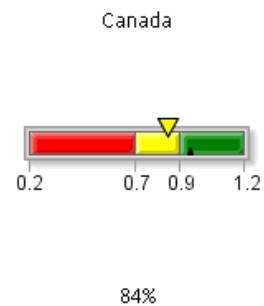
- Dynamic bullet bar



- Dynamic dial meter



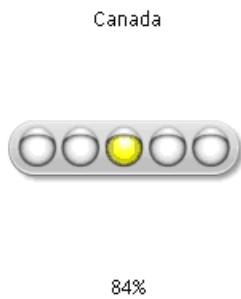
- Dynamic slider



## □ Dynamic speedometer



## □ Dynamic stoplight




---


## Select a Gauge for an Indicator

You select a gauge for an indicator when you create or edit an indicator, or personalize an indicator.

To select a gauge for an indicator:

- 1 On the Select Gauge page, select a category.
- 2 If you selected **Dynamic Gauges**, follow these steps:
  - a From the **Type** drop-down list, select a type of dynamic gauge.
  - b To create a three-dimensional effect, select **Enhanced (3D)**.
  - c To display range intervals (tick marks) on the gauge, select **Display range intervals**, and then select the format from the **Format range intervals** drop-down list.
  - d To specify the dimensions of the gauge, type values for the height and width.
  - e Select how to orient the gauge: **Flip horizontal** (around the vertical axis) or **Flip vertical** (around the horizontal axis).
  - f To change the colors in the image to create a ghost effect, select **Ghost** and a method.

These are the methods:

<b>Grayscale</b>	The selected interval is a darker gray than the other intervals.
<b>Inactive color</b>	The areas that are not pointed to are a specific color. To select the color, click  .
<b>Auto ghost</b>	The software determines how to best 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 **Decrease saturation by (%)** field.

To brighten the image, type a value in the **Brighten by (%)** field.

- 3 If you selected something other than **Dynamic Gauges**, click the name of the image that you want to use for the gauge from the **Gauge** table.

## Personalize an Indicator

You can personalize some aspects of an indicator to suit your needs. These changes affect only your view of the indicator, not other users' views.

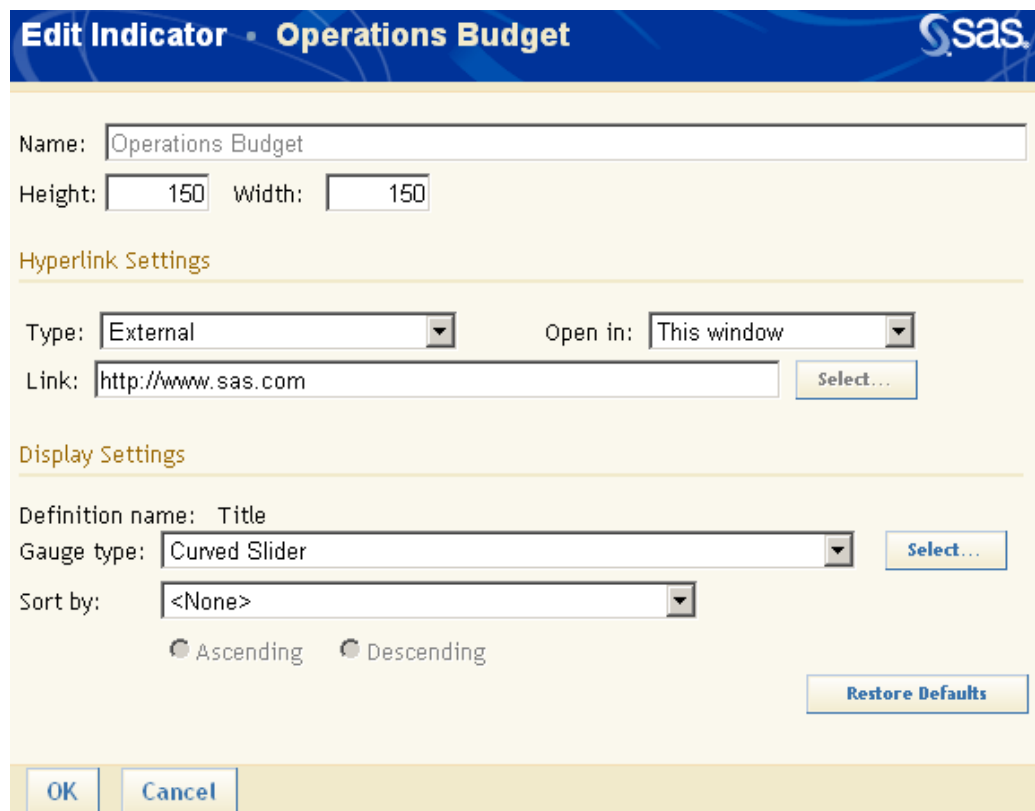
*Note:* You can personalize an indicator only when it has been set to allow personalization. Further, the following aspects appear only when they have been set to allow personalization: height and width, link settings, gauge type, and sorting method. For more information, see “Configure the Indicator” on page 33. △

To personalize an indicator:

- 1 In the portal, if the indicators do not have borders around them, move the mouse over an indicator.

- 2 Click  in the lower right corner of the border around the indicator.

The Edit Indicator page appears.



The screenshot shows the 'Edit Indicator' dialog box for the 'Operations Budget' indicator. The dialog has a blue header with the SAS logo. It contains several sections for configuration:

- Name:** A text field containing 'Operations Budget'.
- Height:** A text field containing '150'.
- Width:** A text field containing '150'.
- Hyperlink Settings:**
  - Type:** A dropdown menu set to 'External'.
  - Open in:** A dropdown menu set to 'This window'.
  - Link:** A text field containing 'http://www.sas.com' and a 'Select...' button.
- Display Settings:**
  - Definition name:** A text field containing 'Title'.
  - Gauge type:** A dropdown menu set to 'Curved Slider' and a 'Select...' button.
  - Sort by:** A dropdown menu set to '<None>'.
  - Sorting:** Two radio buttons, 'Ascending' (selected) and 'Descending'.
  - Buttons:** 'OK', 'Cancel', and 'Restore Defaults'.

- 3 To change the dimensions, type values for the height and width.

- 4 To change the link settings:
  - a From the **Type** drop-down list, select the type of link.
  - b From the **Open in** drop-down list, select a window in which to open the link target.
  - c If you selected an external link, type the URL of the link in the **Link** field.
  - d If you selected a type other than an external link, click **Select** next to the **Link** field and select the URL.

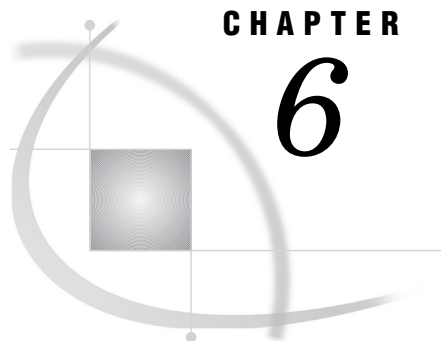
The available choices depend on the type of link.
- 5 To change the display settings:
  - a From the **Gauge type** drop-down list, select a type of gauge.

You can also click **Select** to view the gauges graphically. For more information, see “Select a Gauge for an Indicator” on page 43.
  - b From the **Sort by** drop-down list, select a value to sort on, and then select the sort method.
- 6 To restore all settings to their states as defined for the indicator, click **Restore Defaults**.

See also

“Create or Edit an Indicator” on page 28





## CHAPTER

## 6

## Dashboards

*Manage Dashboards* 47

*Create or Edit a Dashboard* 48

*Personalize a Dashboard* 50

## Manage Dashboards

To manage the dashboards:

- 1 In the SAS BI Dashboard portlet, click **Manage Dashboards**.

*Note:* If you do not see **Manage Dashboards**, then you do not have access permission to manage dashboards. If you need to manage dashboards, contact your SAS BI Dashboard system administrator. △

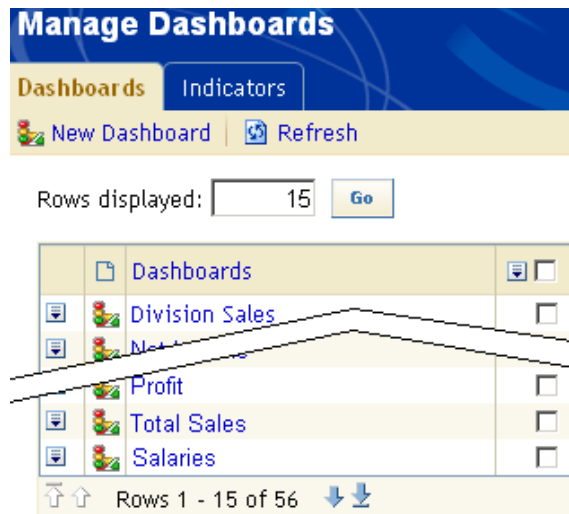
The Manage Indicators page appears.

Indicator	Data Model	Display	Range / Gauge Type	
07 Remote Data	All Sales By Region	KPI Table	Regional Sales Map / Stylized Highlighted Tacho	<input type="checkbox"/>
Sales Heatmap	Atlantic Region	KPI Table	U.S. Sales Map / Gauge	<input type="checkbox"/>
Heatmap	New Sales	Range Map	0 - 500,000 /	
Sales Heatmap	LE_spmNew	Range Map	U.S. Sales Map / Gauge	<input type="checkbox"/>
Salaries	07 Salaries	Gauged Graph	LE_range 80-140 / Stylized Highlighted Tachomet	<input type="checkbox"/>

Rows 1 - 15 of 81

- 2 Click the **Dashboards** tab.

The Manage Dashboards page appears.



- 3 To specify the number of rows to display on the page, type a number in the **Rows displayed** field, and click **Go**.
- 4 (Optional) Create or edit a dashboard .
- 5 Scroll through the list.  
For more information, see “Scroll Through a List” on page 9.
- 6 To change the sort order, click **Dashboards** in the column heading.
- 7 (Optional) Delete one or more dashboards from the list.  
For more information, see “Delete One or More Items in a List” on page 9.
- 8 To refresh the list, click **Refresh**.

## Create or Edit a Dashboard

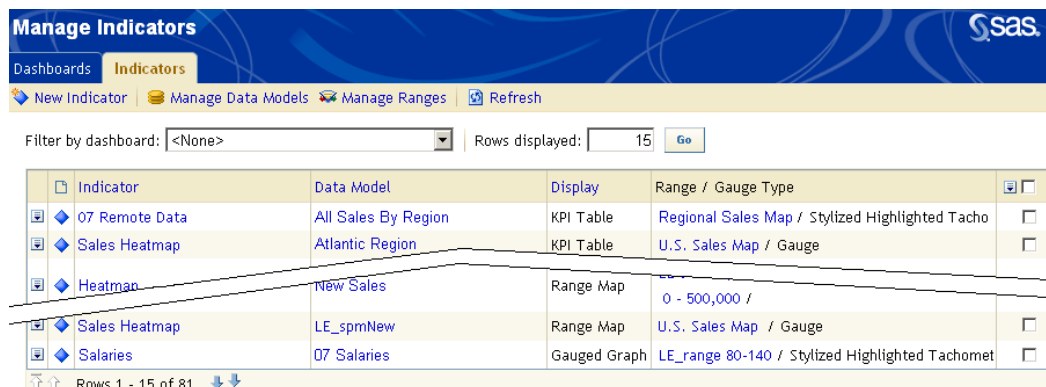
When you edit a dashboard you change it for all users.

To create or edit a dashboard:

- 1 In the SAS BI Dashboard portlet, click **Manage Dashboards**.

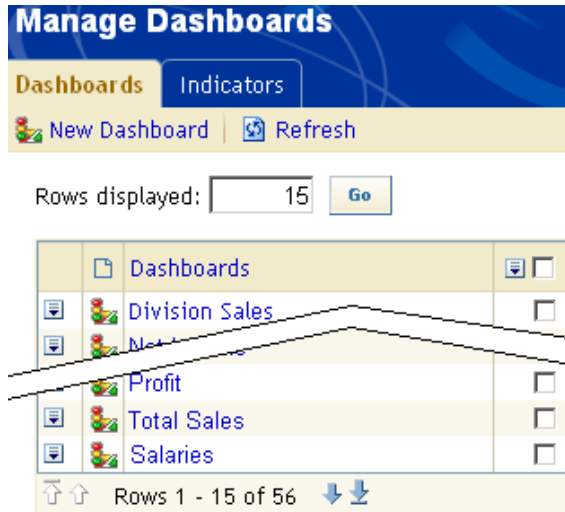
*Note:* If you do not see **Manage Dashboards**, then you do not have access permission to manage dashboards. If you need to manage dashboards, contact your SAS BI Dashboard system administrator. △

The Manage Indicators page appears.



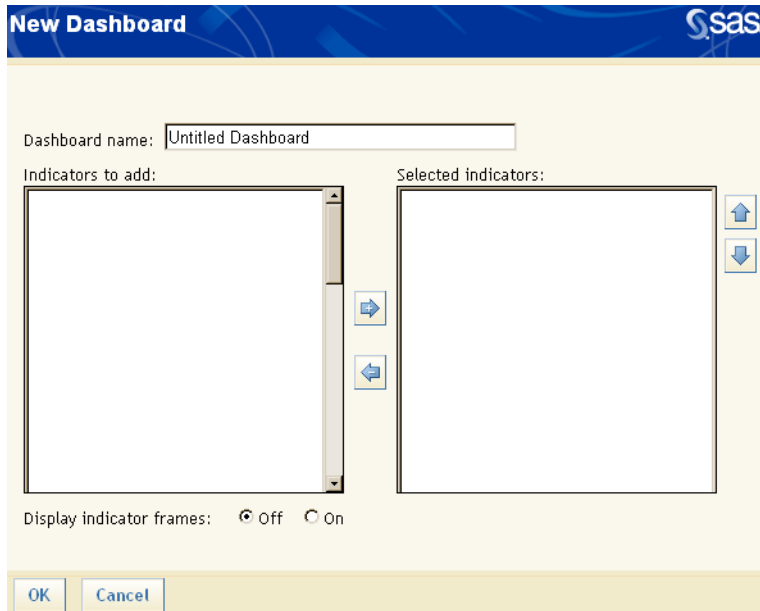
- 2 Click the **Dashboards** tab.

The Manage Dashboards page appears.



- 3 To create a new dashboard, click **New Dashboard**.

The New Dashboard page appears.



- 4 To edit a dashboard, click the name of the dashboard.

The Dashboard Properties page appears.

- 5 To specify the name of the dashboard, type the name in the **Dashboard name** field.

- 6 Move indicators between the **Available indicators** list and the **Selected indicators** list by clicking the arrows between the lists.

You can select more than one indicator.

- 7 To change the order of the indicators in the SAS BI Dashboard portlet, select one or more indicators in the **Selected indicators** list, and click the up and down arrows that are next to the list.

- 8 To specify whether borders appear around the indicators, select **Off** or **On** next to **Display indicator borders**.


See also


“Personalize a Dashboard” on page 50

## Personalize a Dashboard

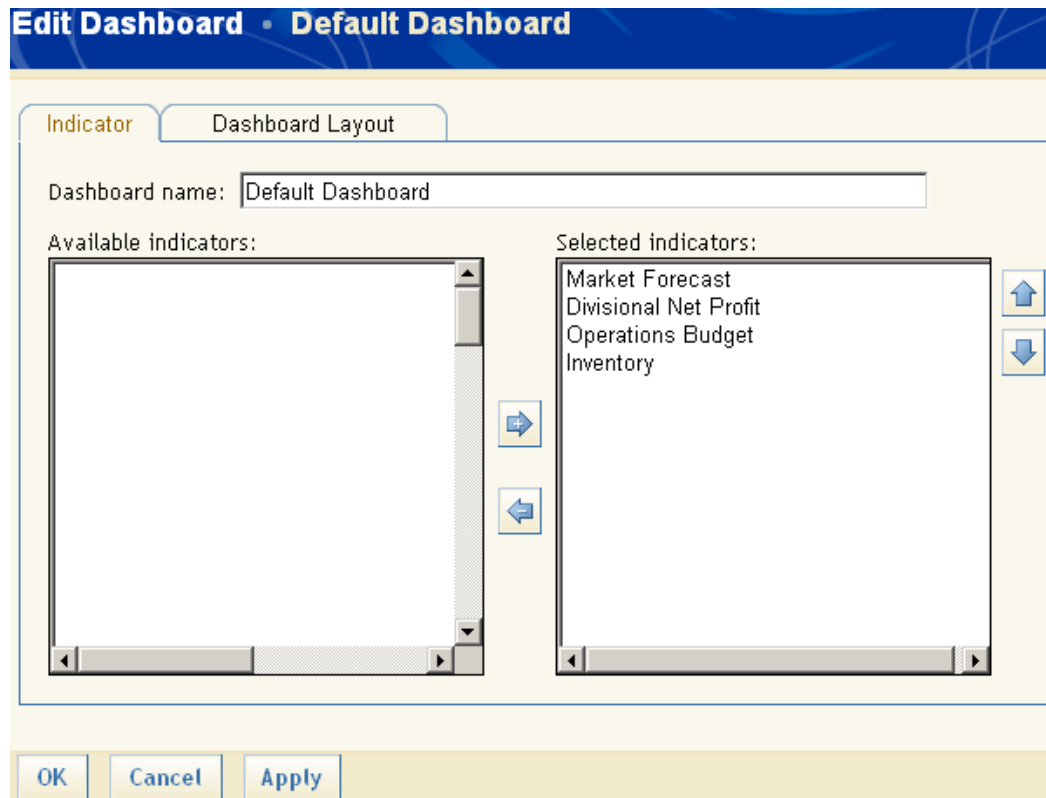
You can personalize some aspects of a dashboard to suit your needs. These changes affect only your view of the dashboard, not other users' views.

To personalize a dashboard:

- 1 In the SAS BI Dashboard portlet, click .

*Note:* If you do not see , then you do not have access permission to personalize dashboards. Contact your SAS BI Dashboard system administrator. △

The Edit Dashboard page appears. The **Indicator** tab is selected by default.



- 2 To rename the dashboard, type a name in the **Dashboard name** field.
- 3 To change which indicators are displayed in the dashboard, move indicators between the **Available indicators** list and the **Selected indicators** list by clicking the arrows between the lists.  
You can select more than one indicator.
- 4 To change the order of the indicators in the SAS BI Dashboard portlet, select one or more indicators in the **Selected indicator** list, and click the up and down arrows that are next to the list.

- 5 Click the **Dashboard Layout** tab.

The screenshot shows a dialog box titled "Edit Dashboard - Default Dashboard". It has two tabs: "Indicator" and "Dashboard Layout". The "Dashboard Layout" tab is selected. Inside the tab, there are the following controls:

- Layout:** Two radio buttons, "Horizontal" (which is selected) and "Vertical".
- Height:** A text input field containing the value "500".
- Width:** A text input field containing the value "700".
- Refresh:** A checkbox that is currently unchecked.
- Minutes:** A text input field containing the value "10".

At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Apply".

- 6 To change the orientation of the indicators in the dashboard, select **Horizontal** or **Vertical**.
- 7 To change the dimensions of the area that contains the indicators, type values for the height and width.
- 8 To automatically refresh the indicators, select **Refresh**, and type how often to refresh in the **Minutes** field.

See also

“Create or Edit a Dashboard” on page 48



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# Your Turn

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