

Data Dashboards: Viewing data visually

The images below show Data Dashboards.

Dashboards are accessed either by clicking on the "Reports / Dashboards" icon for an Entity in the System Entities Screen, and selecting a Dashboard, or by selecting a dashboard from within an individual record.

Dashboards accessed from an individual record will show individual data, for example perhaps a chart of sales to a particular customer. Dashboards accessed from the Entity will show summary data for the whole database.

Entities that do not have Dashboards designed will not have an "Reports / Dashboards" icon. System Administrators can add and edit Dashboards, how this is done is detailed later in the technical sections of the help.

Dashboards can contain

- Data Grids: These are similar to the system view-grids. More information about grids is covered here: [View Grids for viewing, sorting and finding data](#)
- Charts and graphs. These give a very wide variety of possible options for visualizing data. View more details of how to manage charts in the system here: [Using Charts to visualize data in the system](#)
- Data-cubes: These group data in multiple dimensions, and include the capability to show data in chart / graph format. More information on using data-cubes can be found here: [The Data-cube: powerful data analysis](#)

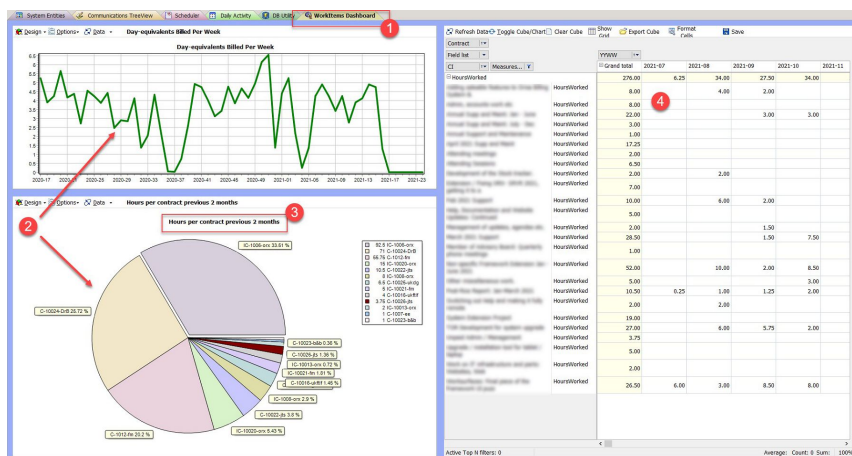
Once a Dashboard icon is clicked in the Model Diagram a Dashboard will open. If it has not yet been designed by the System Administrator the dashboard may appear to be blank. This does not necessarily mean it does not work, it just shows that the Administrator has not yet completed the customization process. Customization is done by right-clicking on the Dashboard and selecting the Customize option. Items available to add to the Dashboard are shown on the right of the Customization screen, items that are visible are shown on the left. Drag items around to customize the layout, drag items on the right over to the left to make them visible.

Customization is dealt with in detail in this article: [Customizing the User Interface Layout Controls](#)

It is also possible to create a "Kanban Board Dashboard" in Orixa. This is a specialized form of data-visualization which groups data by the status of records so that a project management process can be undertaken. Details of Kanban boards are covered here:

[Kanban Boards in Orixa](#)

A Dashboard with typical data-components

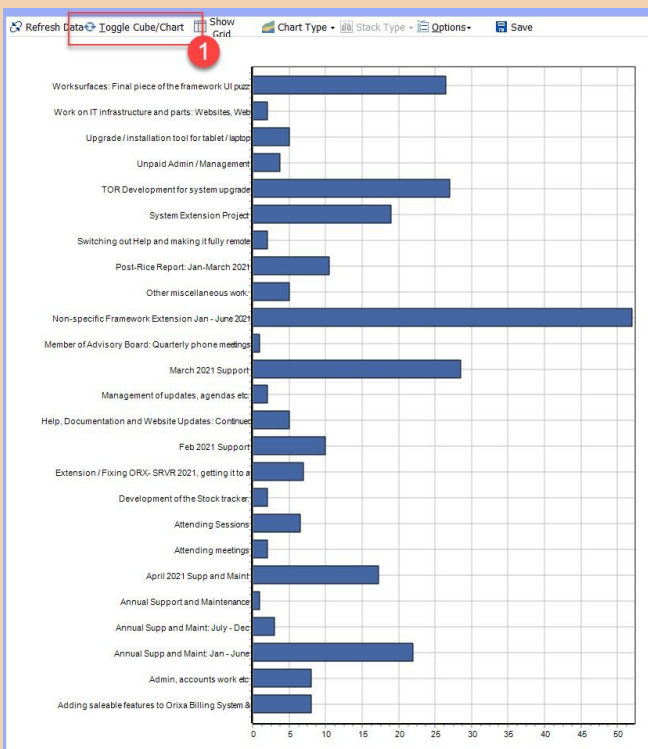


Example Data Dashboard

1. The name of the selected Dashboard is displayed in a new "tab" in the system. Right-click on this tab and select "close" to hide the tab, when you no longer need it. You can leave Dashboards open for as long as you like.
2. Dashboards can contain charts with a wide variety of formats: Pie, Bar, Line, Area, XY etc. A number of options for working with each chart are included in a menu this allows actions such as filtering the content of the chart, changing how it looks etc.
3. System Administrators can add Titles to charts to make them easier to understand.

- Some data in Dashboards is laid out in a "Pivot table" format. System Administrators can alter the layout, column ordering and organisation of data in a dashboard and then save it so that it shows useful information for users.

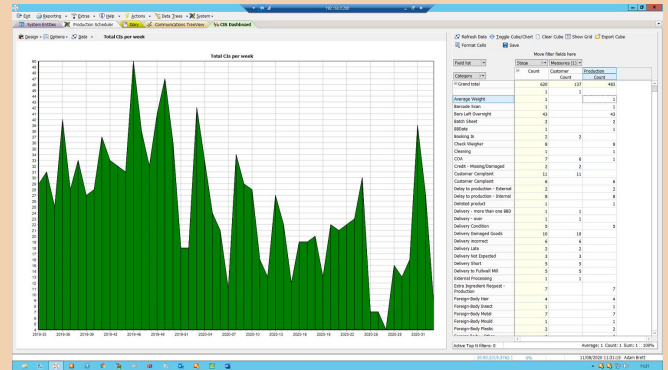
Example Dashboards



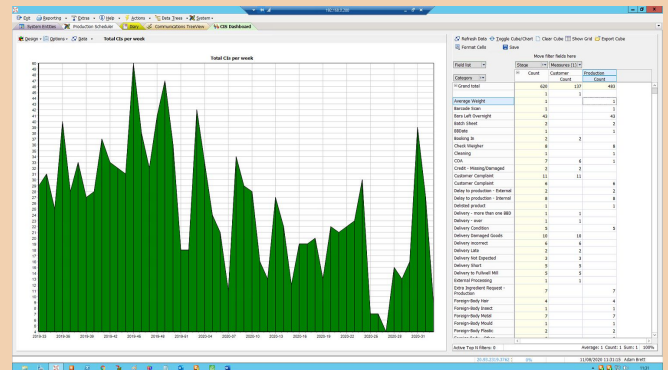
Pivot Chart

Dashboard Pivot Tables include a useful toolbar, this includes many options to alter the presentation of the data, and is fully explained in the Pivot Table section of the help (link provided above).

- Click the "Toggle Cube / Chart" option in the Pivot Table Toolbar to show the data visually.

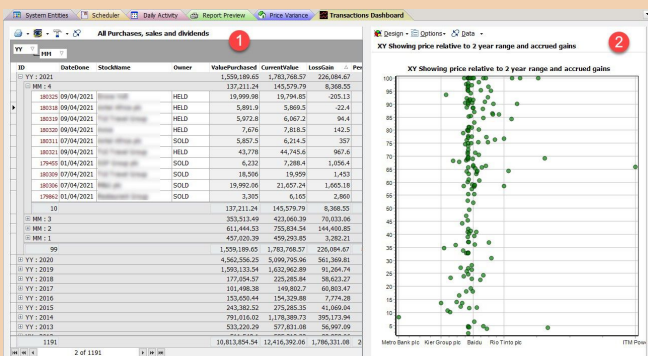


CIS Dashboard with chart and pivot table

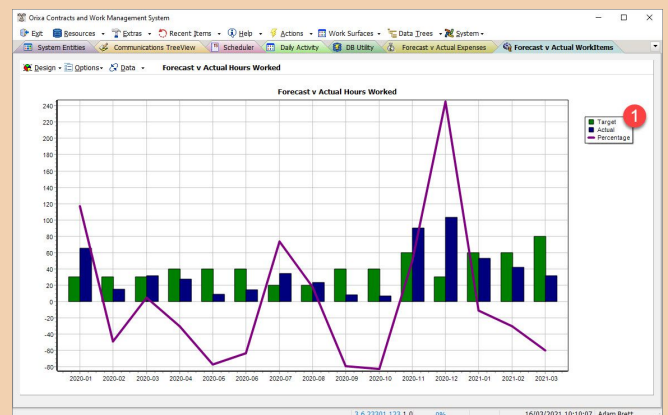


Timeaway/Holidays Dashboard

Showing charts of current and prior year holidays taken, with total holiday allowances.



Dashboard with "X-Y" chart data



Forecast Dashboard

A lot more details on how to use, edit and design all these items are covered in other sections of the help (links above).

Your System Administrator can also add and extend dashboards in the system at any time by adding SQL scripts to the Resources system-table. If your system lacks a useful Dashboard ask your Administrator and they should be able to add it.