



Self-Service DASHBOARD: Intuitively create smart dashboards in SaaS



Free



SAAS Secure



Intuitive



Responsive

## Self-Service DASHBOARD: Quick user guide

**Last Edition January 30<sup>th</sup>, 2018**

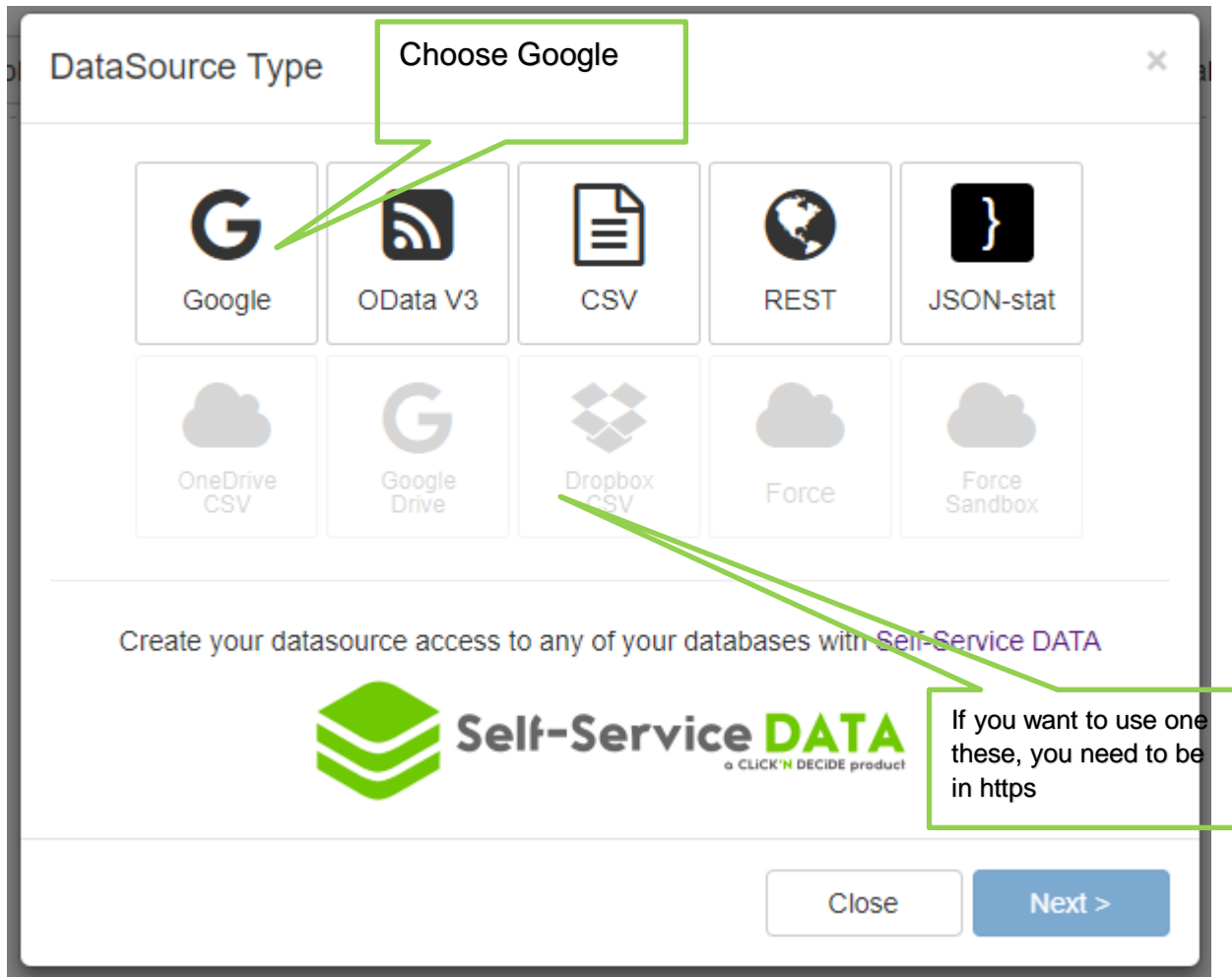
Please note: Self-Service DASHBOARD is a part of  
CLiCK'N DECiDE BAI

## 1. STEP ONE: Find the apps!

- Go to <http://self-service-dashboard.com/app/>

## 2. STEP TWO: Add a data source.

- On the top left  a data source.



- Then click next.



## 2.1. Use our example:

DataSource Properties

Name:

URL:  Advanced

Query:

Select a name for your data source. For example "Test"

Click here to find our example.

Then click here to use it.

A URL that supports the Google Chart Tools Datasource Protocol. [More info](#)

**EXAMPLE: GOOGLE SPREADSHEET**

Using a **public** Google spreadsheet, change **edit...** to **gviz/tq**

For instance, the link

`https://docs.google.com/spreadsheets/d/1RrVwI0AGznRc5mDFNNSoiKNx1nSTWYP0unUuGvdcAR0/edit#gid=890441256`

will become

`https://docs.google.com/spreadsheets/d/1RrVwI0AGznRc5mDFNNSoiKNx1nSTWYP0unUuGvdcAR0/gviz/tq`

[Use this example](#)

**EXAMPLE: SELF-SERVICE-DATA**

With Self-Service-Data, use a Google Datatable link such as:

`https://saas.clickndecide.com/dvweb/Menu/Query.ashx?__ma=BAI+Demonstration&__mi=2317&__rp=Sales+Details.gcd`

User: clientsaas  
Password: demo

[Use this example](#)

Close < Back Data Model... Done

- Click on

Load Data

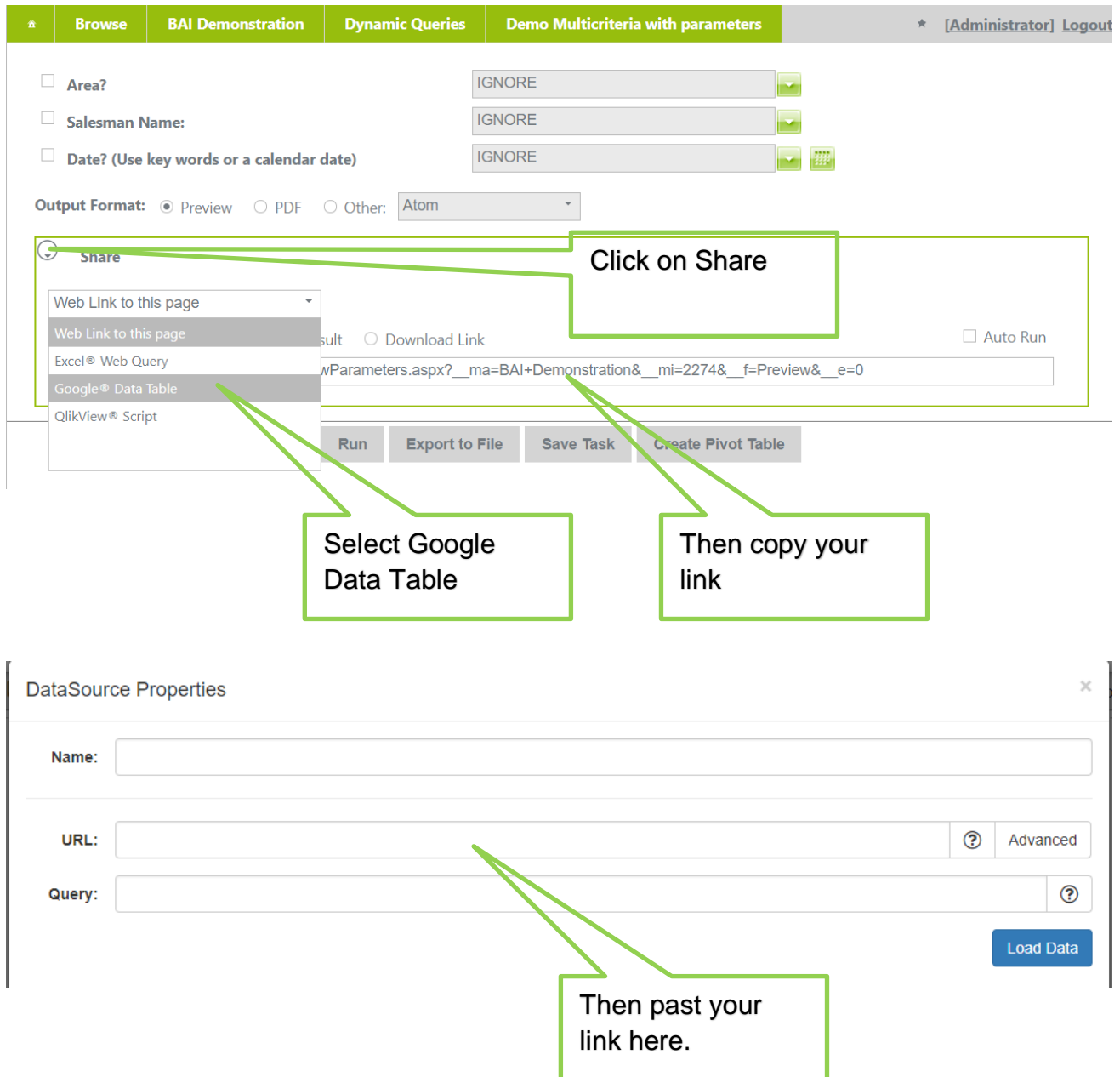
- Click on

Done

## 2.2. Or use your data through our solutions

You want to create a first dashboard with your data using CLICK'N DECIDE or Self-Service DATA. But for your first dashboard we recommend you to use our example **STEP 2.1**

- Go to your Web Portal
- Find your query



The screenshot shows the 'Self-Service DASHBOARD' interface. The top navigation bar includes 'Browse', 'BAI Demonstration', 'Dynamic Queries', and 'Demo Multicriteria with parameters'. The user is logged in as '[Administrator]'. Below the navigation bar, there are input fields for 'Area?', 'Salesman Name:', and 'Date?' (Use key words or a calendar date), each with an 'IGNORE' button. The 'Output Format' is set to 'Preview'. A 'Share' dialog is open, showing a dropdown menu with options: 'Web Link to this page', 'Excel® Web Query', 'Google® Data Table', and 'QlikView® Script'. The 'Google® Data Table' option is selected. A text box displays a URL: 'wParameters.aspx?\_\_ma=BAI+Demonstration&\_\_mi=2274&\_\_f=Preview&\_\_e=0'. Below the text box are buttons for 'Run', 'Export to File', 'Save Task', and 'Create Pivot Table'. A 'Load Data' button is also visible. Annotations with green boxes and arrows point to the 'Share' button, the 'Google® Data Table' option, the URL text box, and the 'Load Data' button.

**Click on Share**

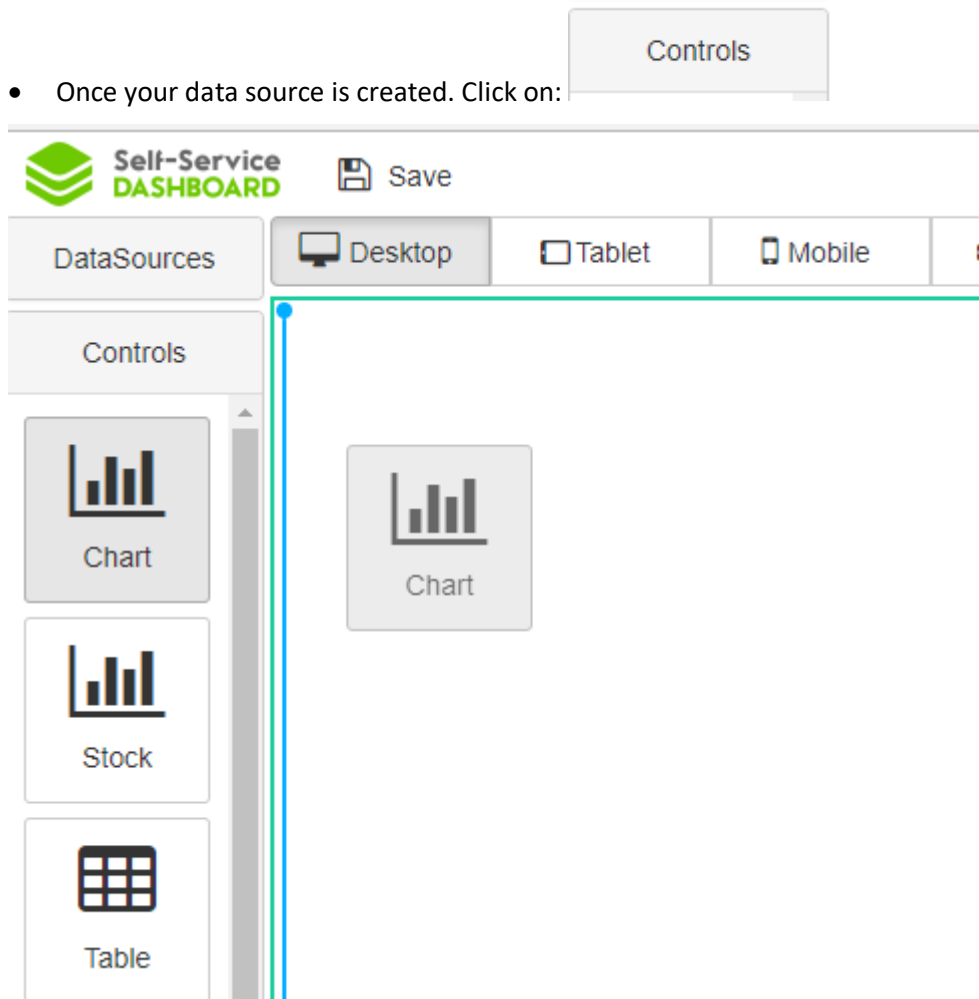
**Select Google Data Table**

**Then copy your link**

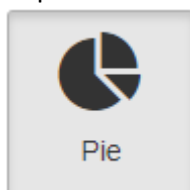
**Then past your link here.**

### 3. STEP THREE: Create your first Chart

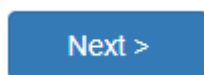
- Once your data source is created. Click on:



- Drag and Drop a chart.



- Select the

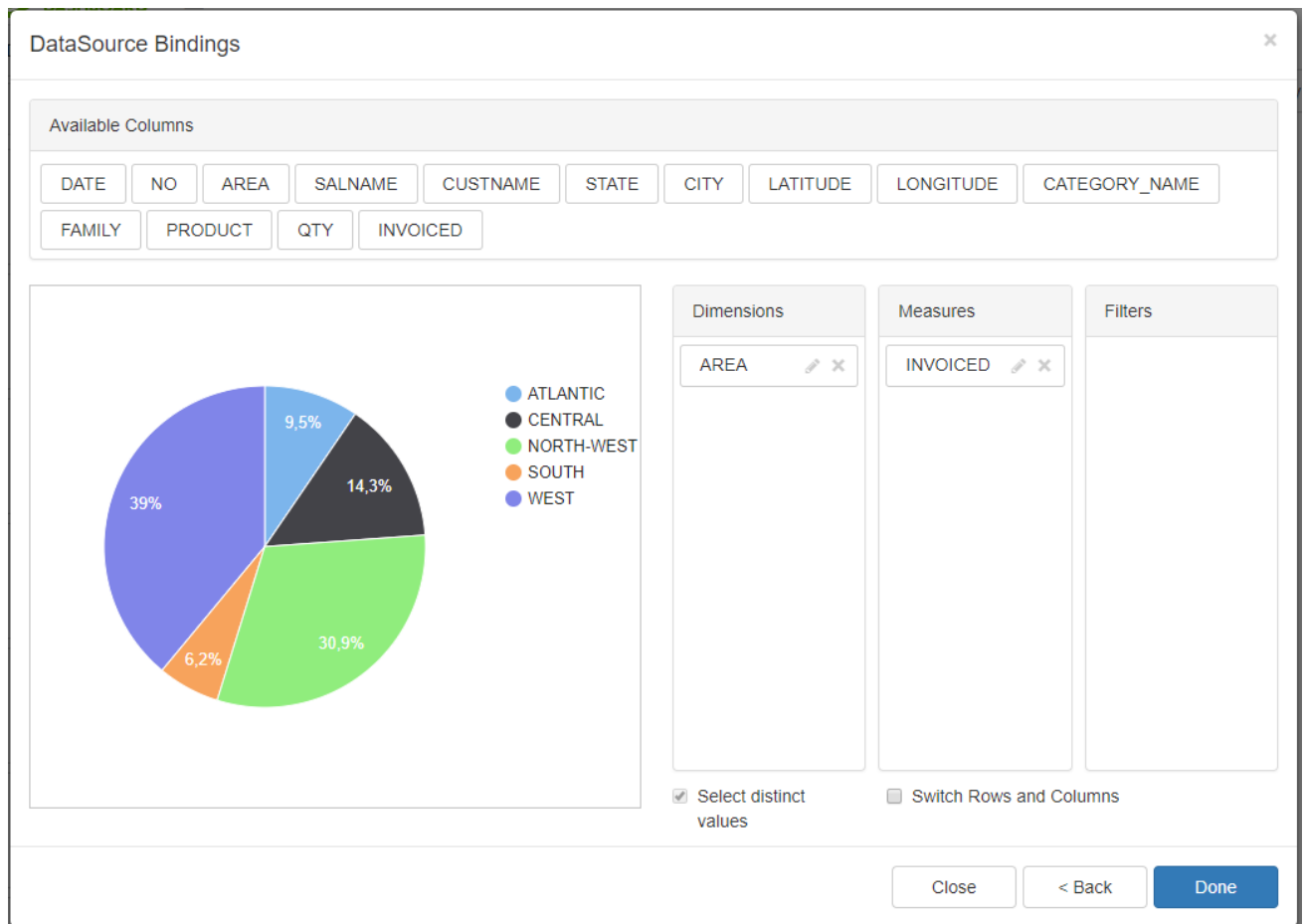


- Click



Select your data source

Then click on Next



- Drag and drop your measure and dimension, for our example you will drop:
- Area in dimension
- Invoice in measures
- Then you click on done.

What is a measure? A dimension?

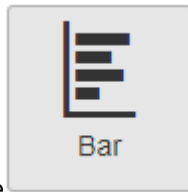
A measure is a numerical value that quantify the data set that you are digging into to understand better.

A dimension is a way to “categorize” the measure.

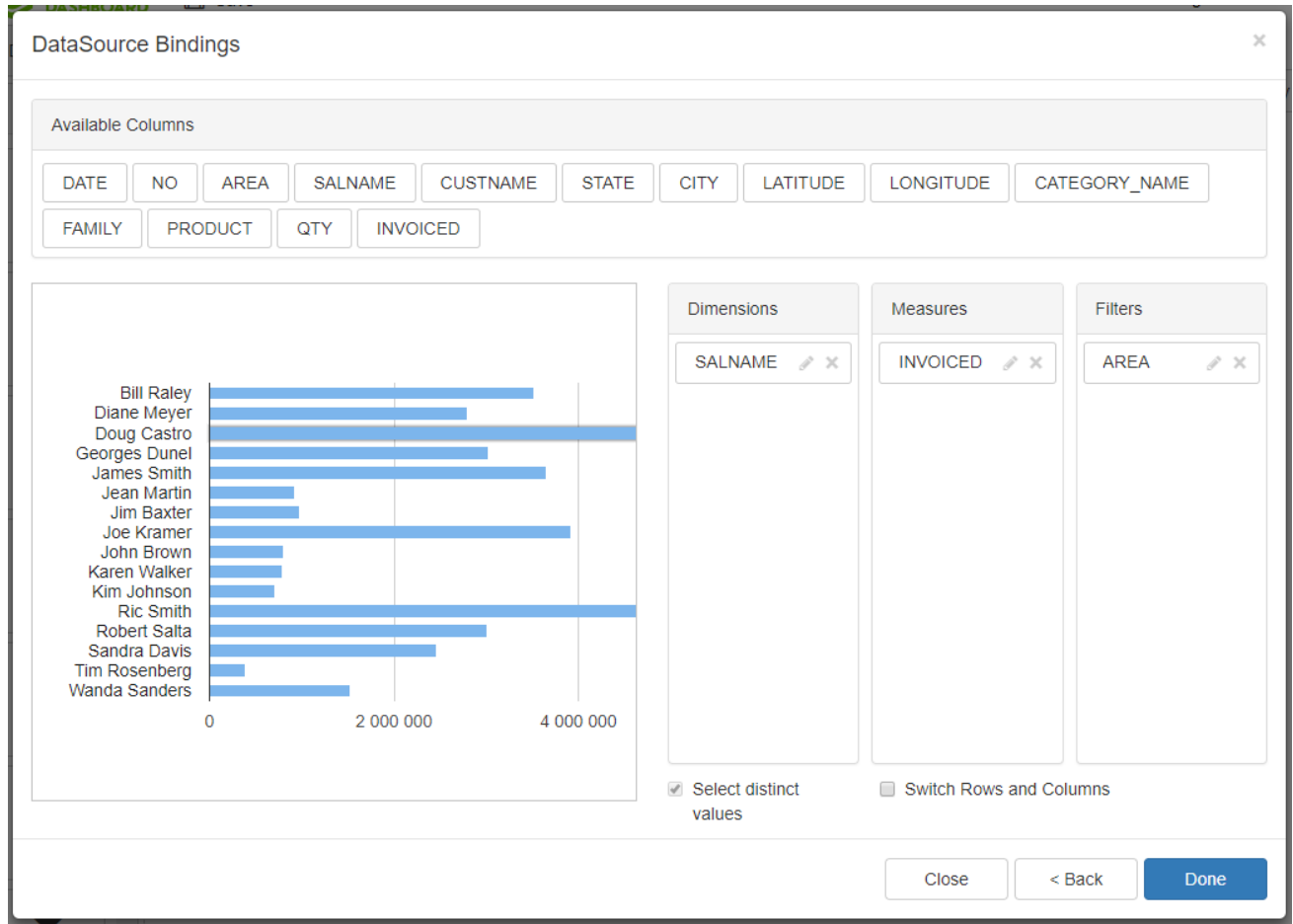
Per example: If you are looking at sales by Area, then “Invoice” is the measure and “Area” is the dimension.

#### 4. Step four: Create a second chart with filter

- Drag and drop another chart



- Select the chart



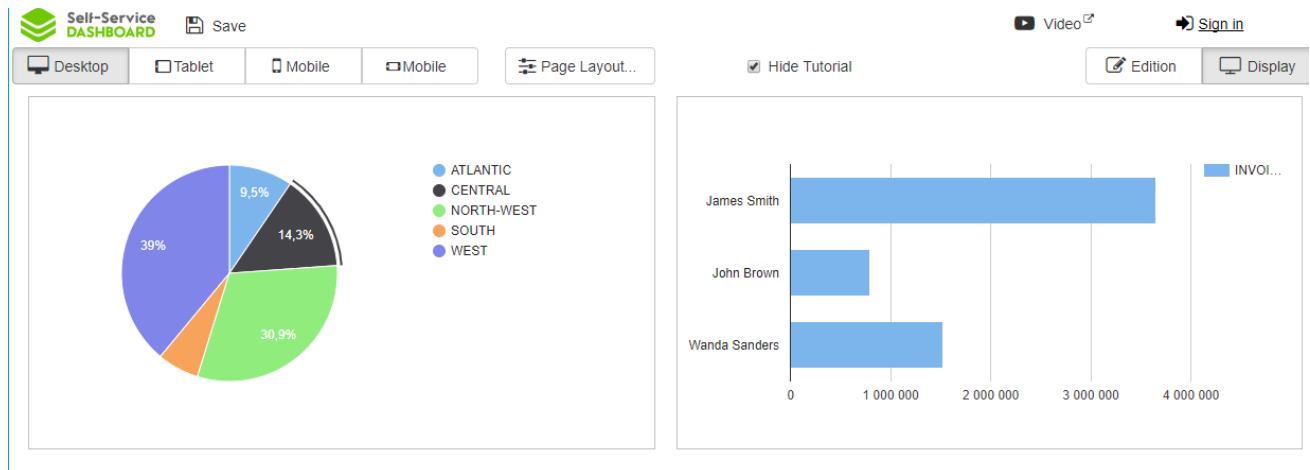
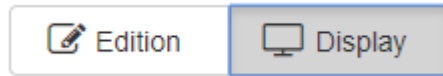
- Select Salename in dimension
- Invoice in measures
- And Area in filters

What is a filter?

A filter is a criteria who allow you to select specific data. In this example if an area is specified it will only select the salesman working in this area. **See next step.**

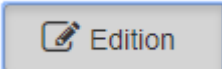
## 5. Step Five: Try your dashboard:

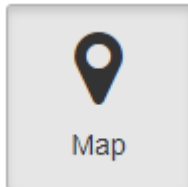
- You can now switch from Edition to Display. Which will allow you to test your dashboard.

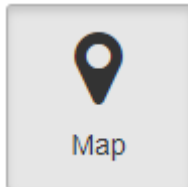










By Clicking on a region on the “Pie chart” you automatically apply the filter that you put on your “Bar chart”, thanks to the **Step FOUR**.

## 6. Step six: Add a Map Chart

- Go back to  mode
- Drag and drop a chart

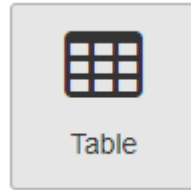


- Select  chart
- Add the following dimensions measures and filters

Dimensions	Measures	Filters
LATITUDE  	INVOICED  	AREA  
LONGITUDE  		



## 7. 7 Step seven: Add a table



- Drag and drop a

DATE	AREA	SALNAME	QTY	INVOICED
4 janv. 2015	NORTH-WEST	Bill Raley	83	94 029,6
5 janv. 2015	ATLANTIC	Diane Meyer	56	73 605
5 janv. 2015	WEST	Doug Castro	49	63 270
6 janv. 2015	WEST	Georges Dunel	67	144 839,5
17 janv. 2015	WEST	Ric Smith	85	140 889,5
27 janv. 2015	WEST	Ric Smith	94	153 853,25
28 janv. 2015	WEST	Ric Smith	29	41 170
29 janv. 2015	WEST	Ric Smith	36	51 505
30 janv. 2015	SOUTH	Jim Baxter	88	158 318,2
30 janv. 2015	WEST	Georges Dunel	98	170 819,6
1 févr. 2015	WEST	Ric Smith	59	79 440
2 févr. 2015	NORTH-WEST	Robert Salta	59	107 565
2 févr. 2015	WEST	Ric Smith	123	197 968,15
3 févr. 2015	WEST	Ric Smith	133	212 857,288
4 févr. 2015	NORTH-WEST	Robert Salta	68	122 289,5
4 févr. 2015	WEST	Ric Smith	68	92 289,5
6 févr. 2015	ATLANTIC	Diane Meyer	64	76 653,475

Dimensions

DATE

AREA

SALNAME

Measures

QTY

INVOICED

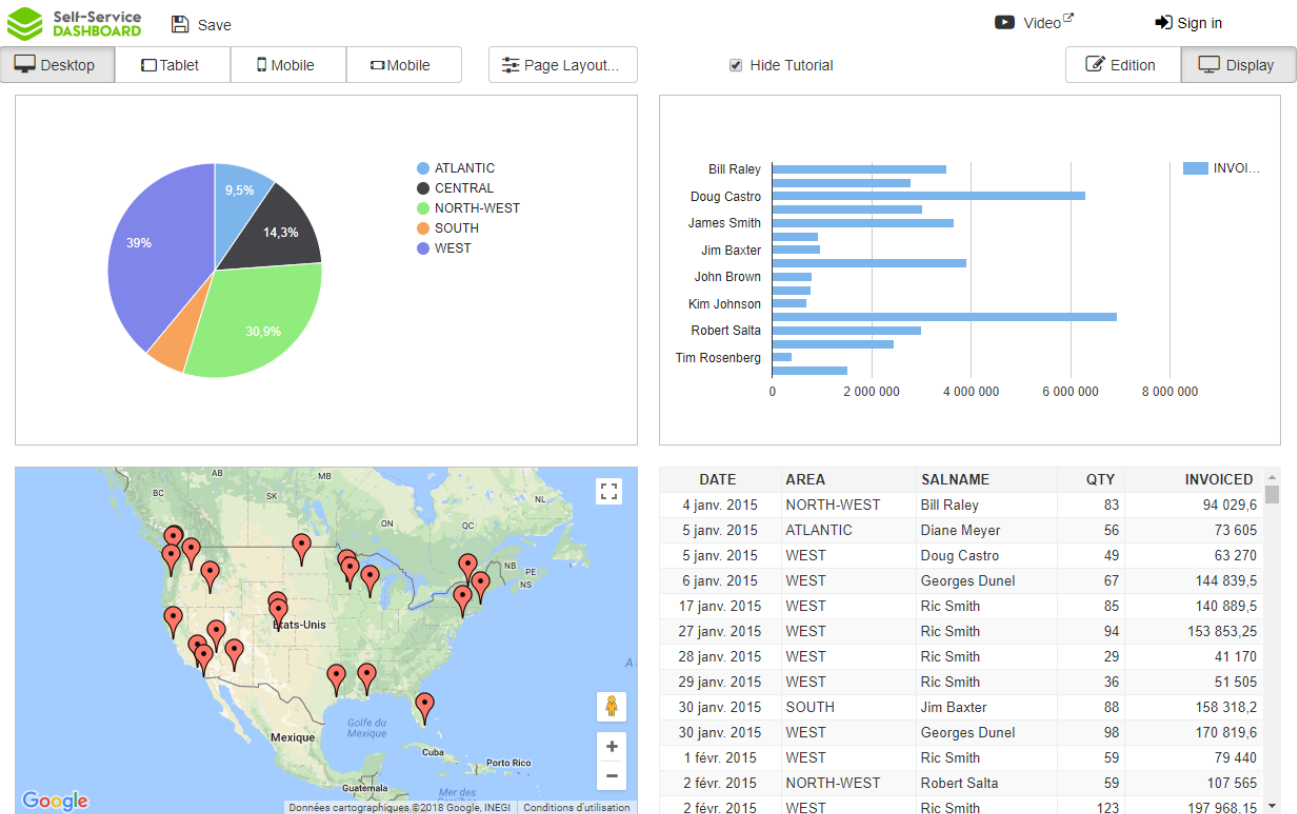
Filters

AREA

☒ Select distinct values
 ☐ Switch Rows and Columns

- Add these dimensions, measures and filters.

## 8. 8 Step eight: Dashboard is complete




- Your dashboard is now complete you can play with it to see if everything is working by switching to



- You can also look how it goes on other devices:



The size of each control can be different on each device. You just need to follow the order, the size is independent.

- Finally, you can  **Save** your dashboard to share it with your end users.
  - You can create an account and then share your dashboard through a simple link.
  - Or save only by using your email and receive and email with the link to give to your end users.