Self-Service DASHBOARD: Intuitively create smart dashboards in SaaS

Free

SAAS Secure

Intuitive

Responsive

Self-Service DASHBOARD: Quick user guide

Last Edition January 30th, 2018

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

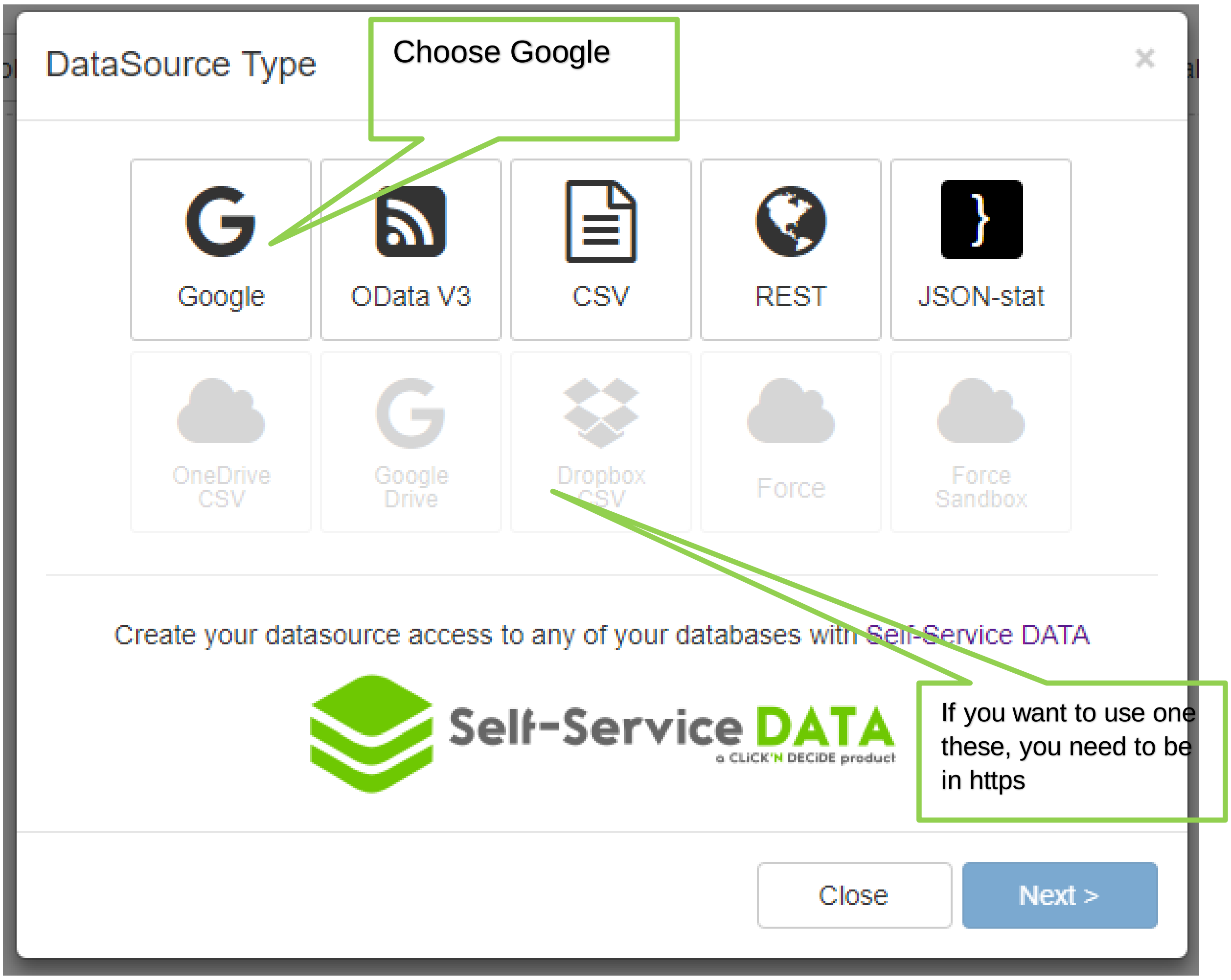
1. STEP ONE: Find the apps!

- 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.

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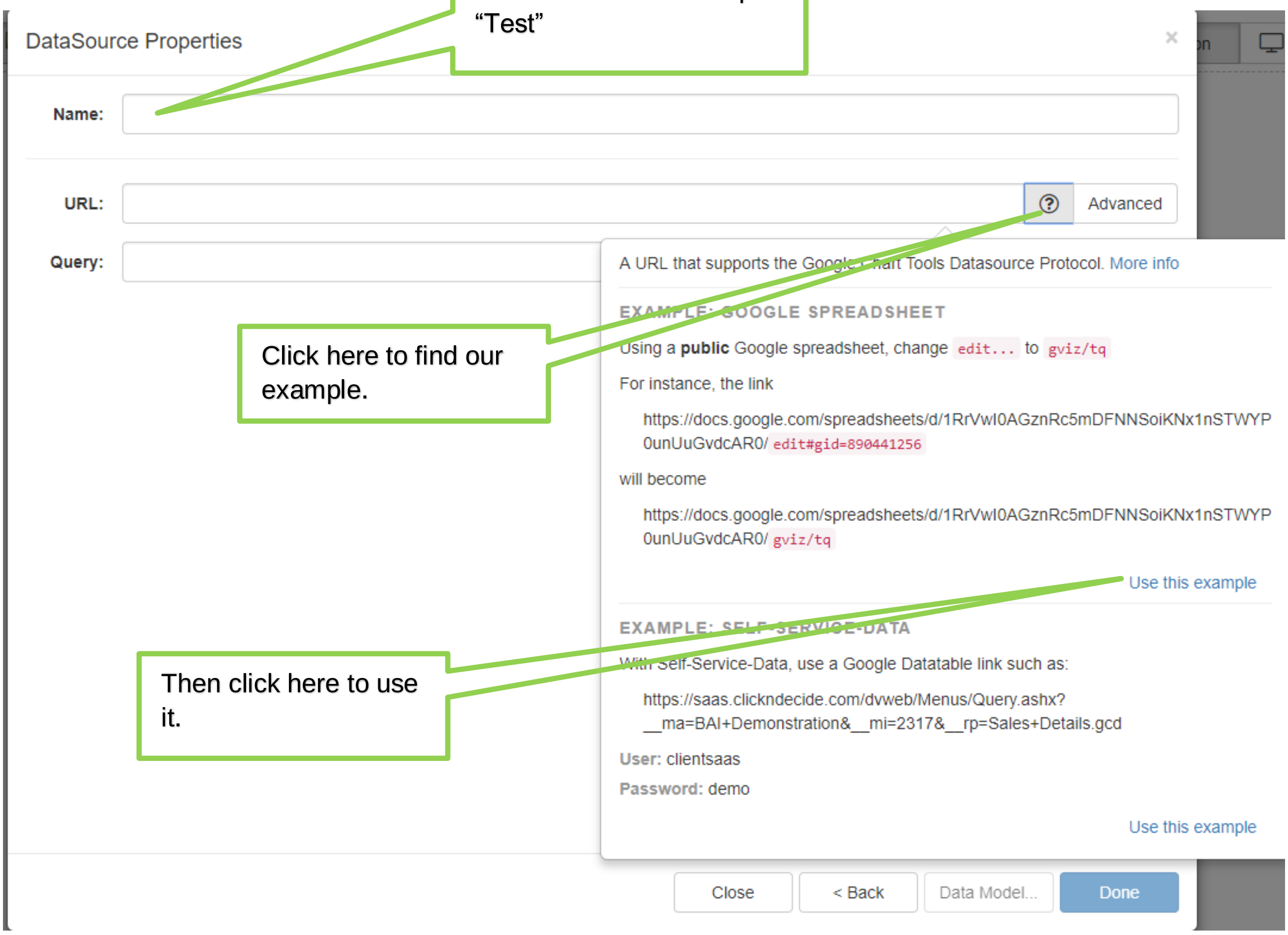
2.1. Use our example:



- Click on 

- Click on 

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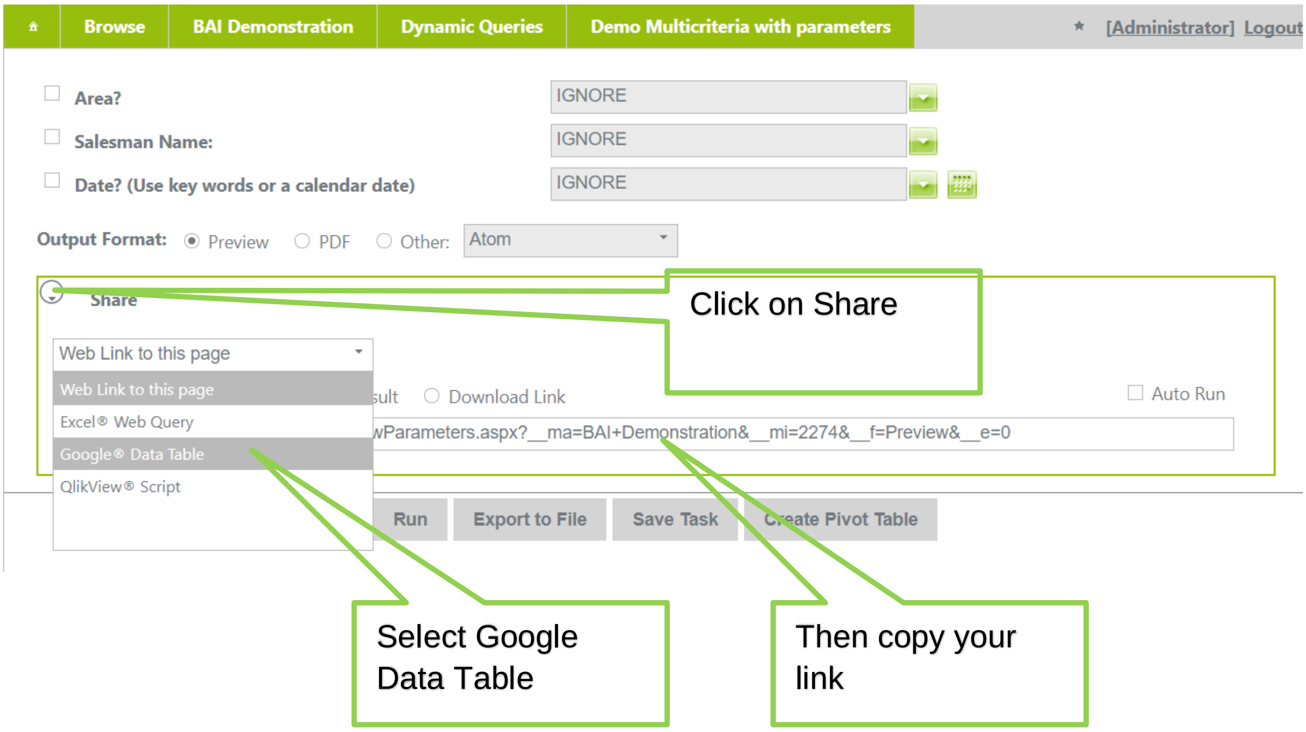
2.2. Or use your data through our solutions

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



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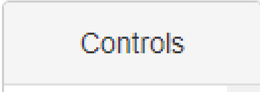
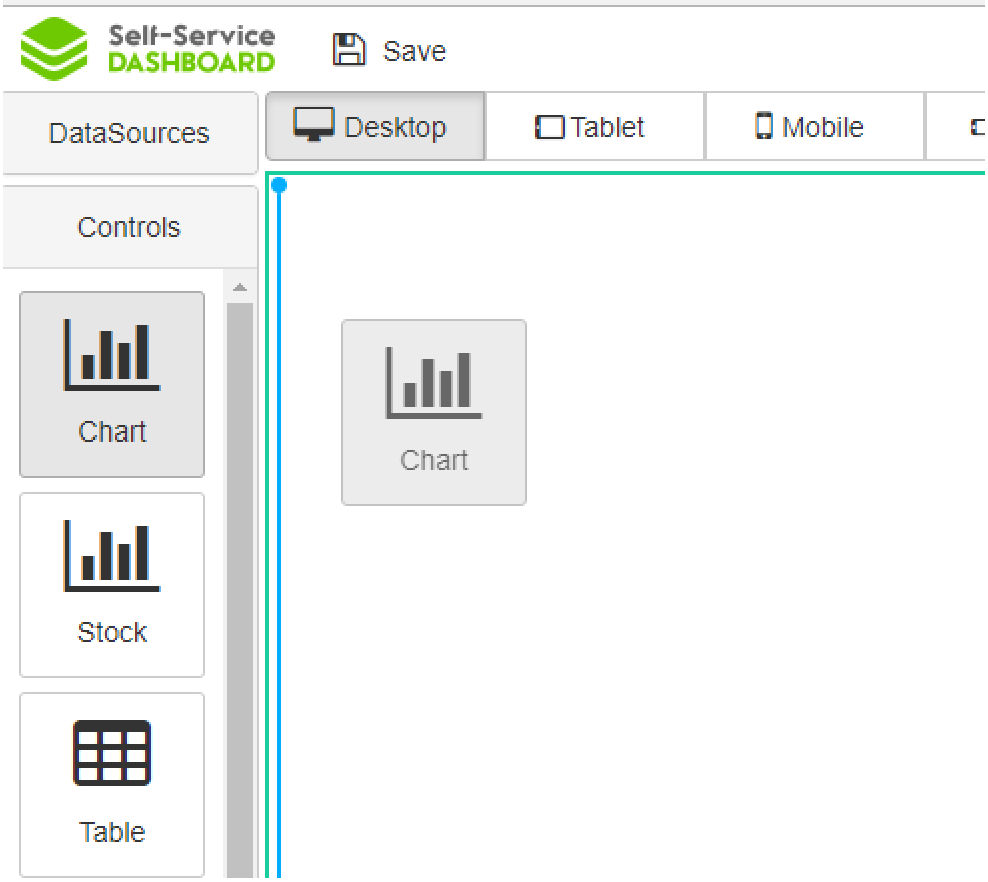
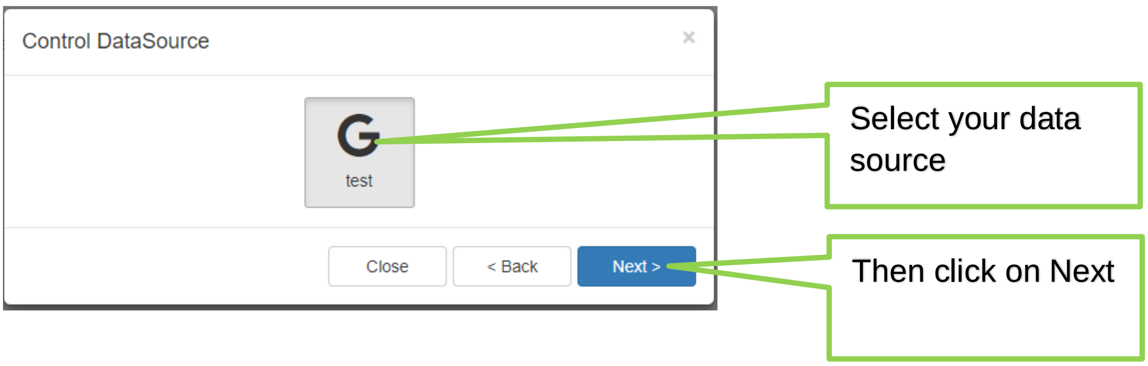
3. STEP THREE: Create your first Chart

- Once your data source is created. Click on: 



- Drag and Drop a chart.
- Select the 

- Click 



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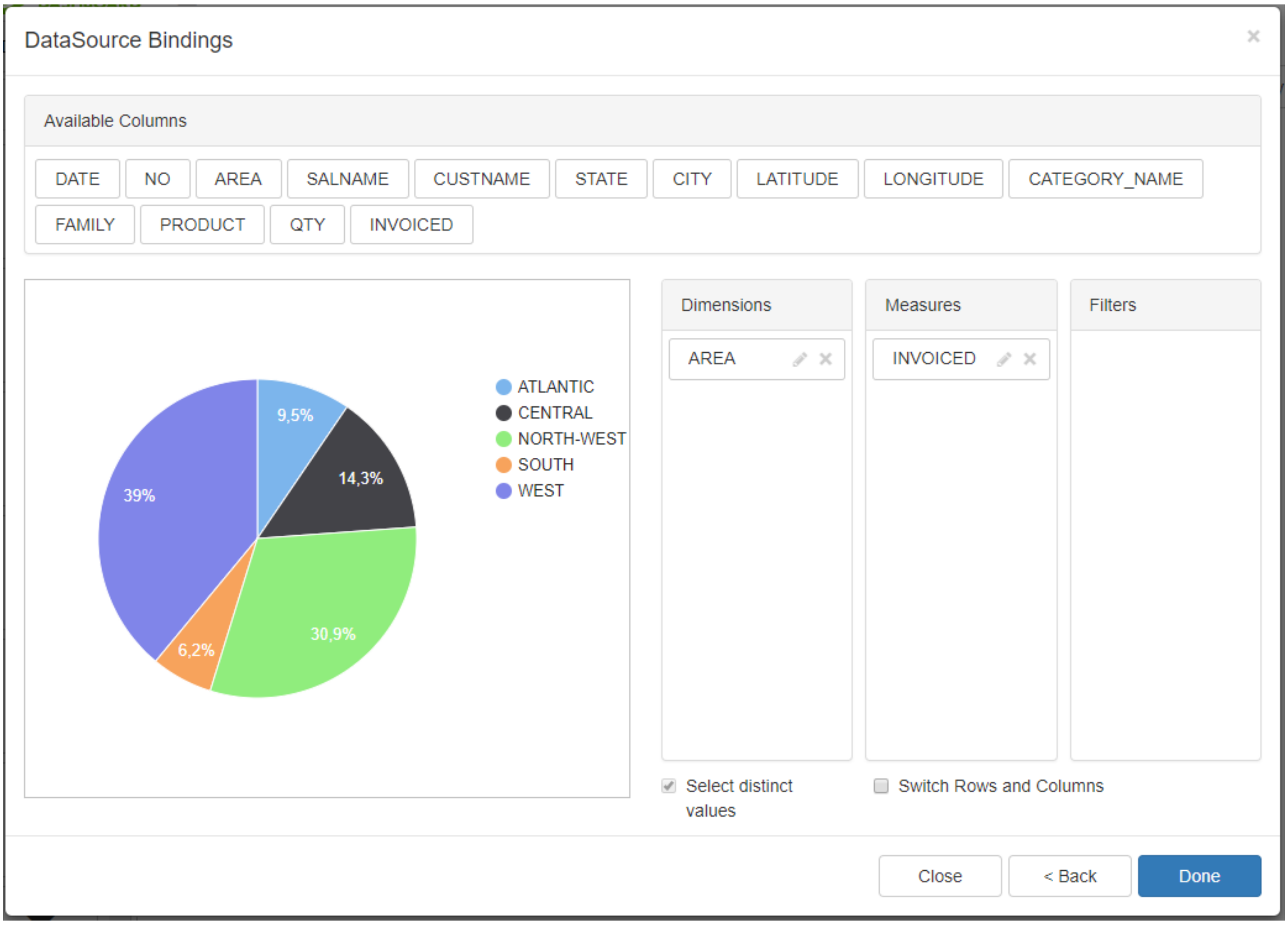

- Drag and drop your measure and dimension, for our example you will drop:
- Area in dimension
- Invoice in measures
- Then you click on done.

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.

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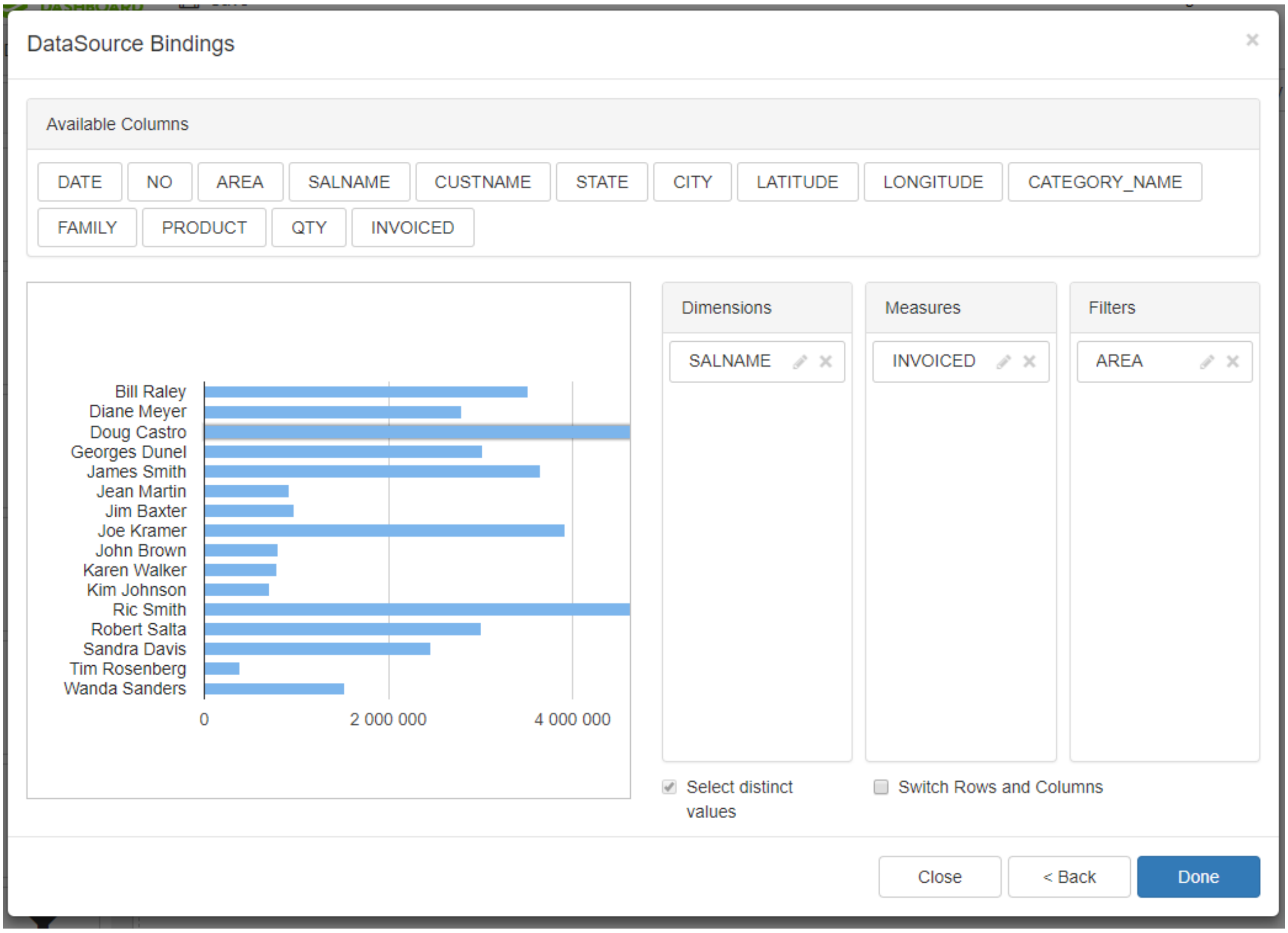
4. Step four: Create a second chart with filter

- 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.

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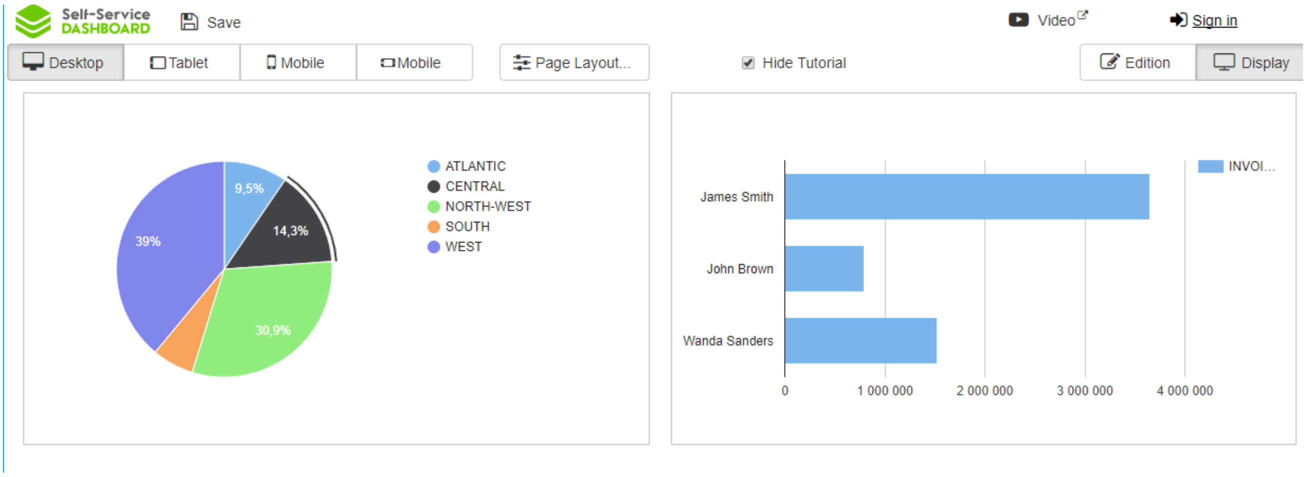
5. Step Five: Try your dashboard:

- You can now switch from Edition to Display. 

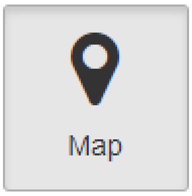
  Which will allow you to test your dashboard.



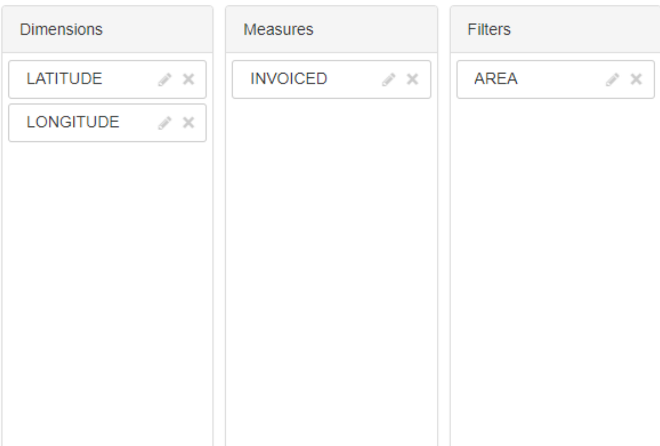
By Clicking on a region on the "Pie chart" you automatically apply the filter that you put on your "Bar chart", thanks to the Step FOUR.

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



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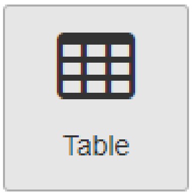
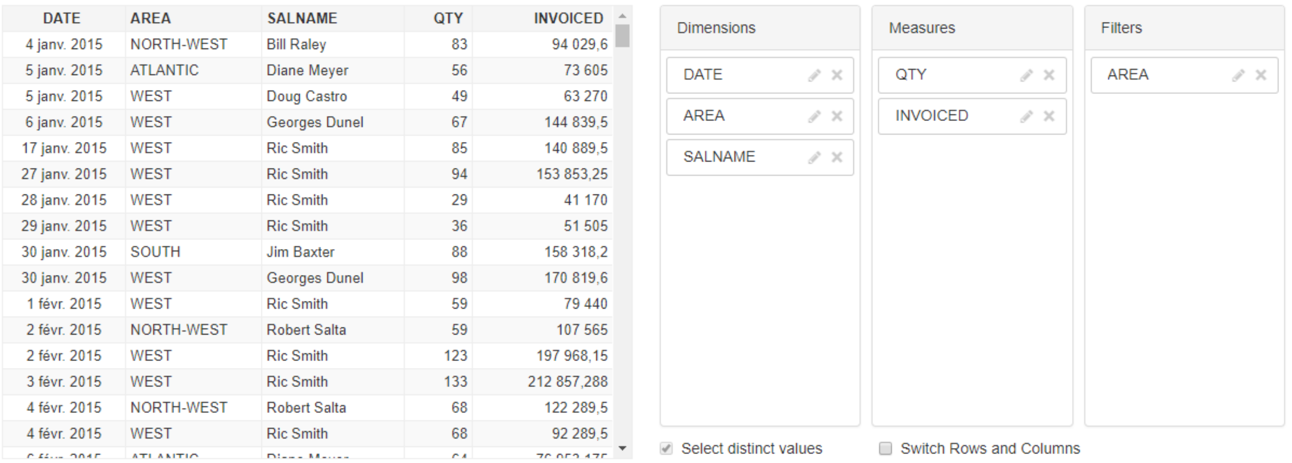
7. 7 Step seven: Add a table

- 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

- Add these dimensions, measures and filters.

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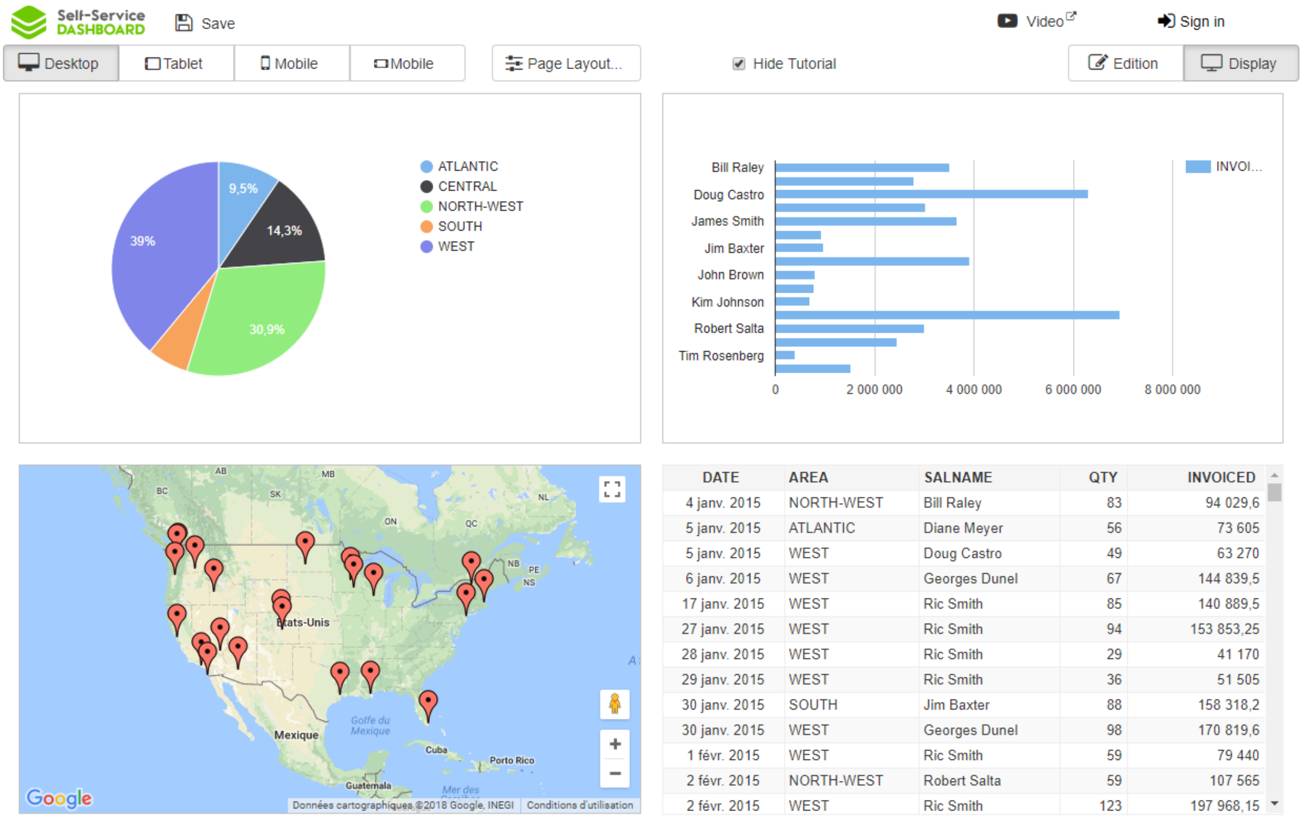
8. 8 Step eight: Dashboard is complete



- Your dashboard is now complete you can play with it to see if everything is working by switching to Display
- You can also look how it goes on other devices: Desktop | Tablet | Mobile | Mobile

  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.

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