

Dashboard

Configuring and using the Dashboard in *Xpert.NET*

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1 Introduction

1.1 Purpose of the Document

Xpert.NET is a very dynamic help desk solution that can be configured in various directions. Experience has shown that many administrators familiarize with the most important modules and configurations after a short period of time, whereas many questions remain unanswered and the full potential of *Xpert.NET* is not tapped due to a lack of knowledge.

This document contains all necessary information on the *Dashboard* add-on module and provides all steps of configuration as well as the possibilities of integrating this module into the *Xpert.NET* system.

1.2 Addressees of the Document

This document addresses *Xpert.NET* administrators.

Additionally, end users are provided helpful advice on handling the *Dashboard* module. On the basis of this document administrators are given the opportunity to create an individual document for their users to gain information on how to use *Xpert.NET*. For this purpose, documents for users and for members of support are provided in addition.

1.3 Remarks on the Content

This document contains descriptions to the functions of the *Dashboard* add-on module. The functional descriptions can, however, differ from your product due to the configuration, licensing and product version. Please contact our support directly if certain functions of your *Xpert.NET* installation are not mentioned in this document.

1.4 Overview of the Dashboard

The *Dashboard* is an add-on module that extends the basic functions of *Xpert.NET*. The Dashboard is used to graphically process and display information about tickets, tasks knowledge base articles and other elements.

Chapter 2 of this document includes the general configuration of the widgets. In *chapter 3* the configuration of the Dashboard from the user's point of view. *Chapter 4* contains an example on creating widgets.

2 Configuring the Dashboard Widgets

The *Dashboard* allows for the parallel processing and displaying of various kinds of information. For this purpose widgets are used to graphically display all the information according to their configuration.

A user is enabled to create or to configure a widget when the group he is a member of has the necessary permissions. Please find further information about the user permissions in the *User Management* documentation.

Configuring the *Dashboard* widgets is effected under **SETTINGS – DASHBOARD WIDGETS**. This page displays an overview of all widgets sorted by category and status.

2.1 Categories and Statuses

By category and *By status* are the available views for the Dashboard.

Categories are created to keep the Dashboard widgets and their information well structured and organized. In the *User Management* it is possible to assign permissions for these categories to several user groups to limit the usage of these widgets individually.

A new category is created by clicking on *Create new category*.

As the purpose of categories is to logically classify the widgets, only the **Name** and **Description** of the category can be defined. The description will be displayed as soon as the cursor is placed over a category. By right-clicking on a category the context menu is opened to edit or to delete a category or to create a new widget in this category.

The view *By status* allows for displaying the widgets according to their current status. If there are widgets in a certain status, the view can be expanded by clicking on the + icon to display all widgets in this status. Statuses and status changes can individually be regulated in the *User Management*.

Hint

Status changes define the statuses widgets can obtain from a certain status. The permissions for status changes are defined for a certain group in the *Permission settings* in the *User Management*. These permissions define the status changes that can be effected by users of this group.

2.2 Master Widgets

Master widgets are created in the settings for the Dashboard (**SETTINGS -> DASHBOARD WIDGETS**) and are perceived as templates for user widgets that can be individually customized and displayed in the Dashboard module.

A new master widget can be created by right-clicking on the respective category via the menu item *Create widget*. Widgets can be edited by double click.

Please note

You can only select categories you are permitted to create widgets in.

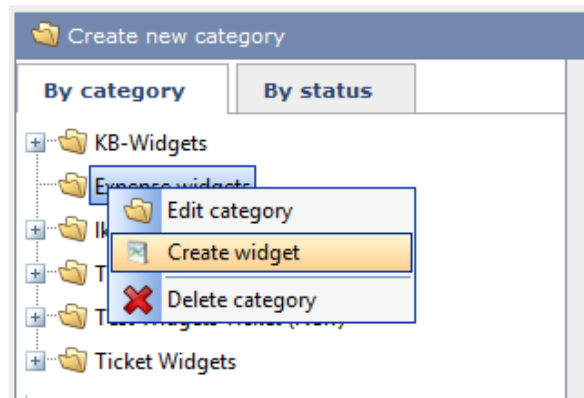


Figure 2.1: Creating a widget via the context menu in the *By category* view.

The **Name**, **Description**, **Data source** and the **Type** (diagram type) can now be defined.

Warning

The data source cannot be changed after having finished the configuration!

Select *Save* to create a new master widget in the selected category. The status of the widget is set to *Draft*.

In the *By category* view and in the *By status* view you can right-click on the widget to open the context menu to customize the widget settings and to copy or to delete the widget.

Please note

When copying the widget you can select another category for the new widget and enter a name and description. All the other widget information is inherited from the copied widget.

By selecting *Save* all the basic information is saved and all tabs of the widget dialog are available for customizing the display parameters of the widget.

2.2.1 Details

On the *Details* tab all the basic information for the widgets are defined.

Details

In this section the general details of the widget are configured.

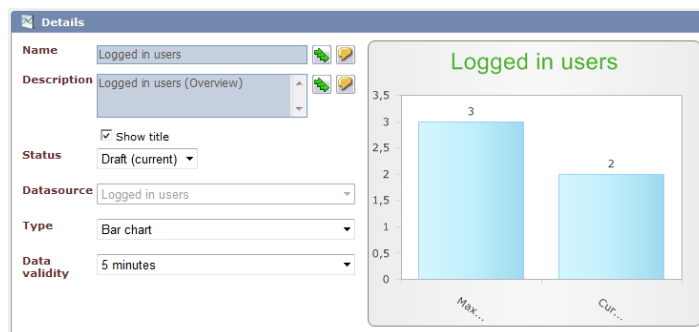


Figure 2.2: Editing the widget details

Name: Contains the name entered at widget creation. The name can be edited at all times.

Description: Contains the description entered at widget creation. The description can be edited at all times.

Show title: If this option is activated, the *Name* is displayed in the title field of the widget.

Status: Contains the current status of the widget. The status can be changed with the drop-down list if the widget is not in use. The following statuses are available: *Draft*, *Review*, *Declined*, *Published* and *Archive*.

Please note

The drop-down list contains all statuses that can be achieved from the current status.

Datasource: The data sources delivers the information to be displayed in the widget. If further search requests are not necessary for this purpose, this option is not displayed in the widget. The extended search for search requests is limited to the required field to avoid the collection of data in combined search requests that cannot be displayed in one chart.

Warning

The data source cannot be changed after having saved the widget settings for the first time. If another data source shall be used, a new widget needs to be created.

The following data sources are available:

- **Expense chart:** The search queries are limited to expenses.
- **Knowledge base chart:** The search queries are limited to knowledge base articles.
- **Logged in users:** User data on logged-in users in the last 24 hours are collected. The number of users is displayed as a maximum value and as the current value.
- **Logged in users per group in last 24 hours:** Displays the number of logged in users per hour grouped by user group.
- **Task chart:** The search queries are limited to tasks.
- **Ticket chart:** The search queries are limited to tickets.
- **Ticket list:** Displays a ticket list instead of a chart, defined by search requests.

Type: The type defines the chart type to be used for displaying the information. Several bar charts, pie charts, line charts and area charts are available.

Hint

Please note that not all types of information can be displayed with all types of charts in a reasonable way.

Warning

When using the data source *Ticket list* it is not possible to select a type as this data source can only be used with the *List* type.

Data validity: Defines the validity period of the collected widget data. When the validity period is expired (e.g 5 minutes) the widget is updated automatically when opening the Dashboard.

Settings

In this section the search query used for filtering the data to be displayed can be configured. The settings for search queries described in the following do only exist for the data sources listed above.

Name: Enter a name for the search request. Click on the button next to the input field to open the configuration dialog for the search request.

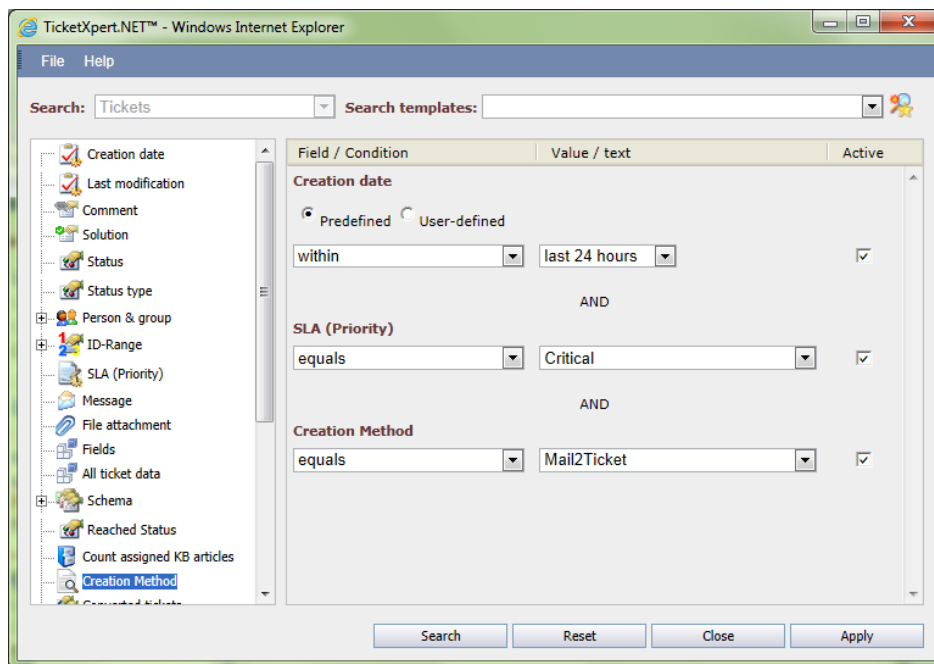


Figure 2.3: Example for configuring the extended search

This dialog allows for configuring search queries. Search queries can only be executed for the selected data source. It is possible to select predefined search templates for a widget. Please find further information in the *Search and Filter* documentation.

Please note

Please do not use only one search query for collecting all the information for groupings.

Warning

A grouping is compulsory for data sources accessing data providers!

After having finished the configuration of the search query click on *Apply* to save the query.

Sealed: If this option is activated, users will not be able to customize the search query settings.

First grouping: The search queries need to be grouped according to several criteria. If, for example, the tickets created in the last 24 hours shall be displayed in a chart, the amount of tickets according to their schema is a recommended grouping option.

Second grouping: For more complex usage scenarios in widgets it may be advisable to use a second grouping to display and to compare amounts of data in detail, for example.

Please note

The second grouping can only be used if only one search query has been created.

If a grouping is effected according to the date (e.g *Created on*, *Start date* etc.), a selection field with different date intervals (*Hour*, *Day*, *Month* and *Year* etc.) is displayed.



Figure 2.4: Setting the date interval after having selected the second grouping

Additionally, a button is displayed next to the selection field where an average value can be set instead of an absolute value. By clicking on the button a new dialog is opened to activate or to deactivate the average for each search request. The user can furthermore select a period of time the average shall be created in.

Axis Y aggregation type: Defines whether the y-axis shall display an amount or a time.

Limit aggregation result: This option is displayed if there are at least two search requests or two groupings. If this option is activated, it is possible to enter a number above zero and to display either the highest or the lowest results.

If, for example, the configuration of a widget defines that multiple bars are displayed per unit, the number of bars can be limited whereas only the highest or lowest results are displayed.

Visual settings

Axis X/Axis Y: If the respective option is activated, descriptive, localized axis names can be used.

Skin: The appearance of a widget can be customized with various skins.

Legend: This option defines whether a legend shall be displayed and, if yes, if it shall be displayed within or outside the chart.

Marked Zones: This option allows for defining from-to zones (e.g. for bar charts). Enter a name for the zone and click on the button next to the input field to create a new zone.

Please note

Select a zone in the drop-down list and click on this button to edit the settings for this zone.

The following three options belong to the marked zones and must imperatively be defined before a zone can be used.

Color: Defines the color of the zone. Select the desired color to define it as the color for the zone.

Lower limit: Defines the lower limit of the zone. Please enter integer values only.

Upper limit: Defines the upper limit of the zone. Please enter integer values only.

Warning

The limit values need to be different. The widget creation cannot be finished if both values are identical.

After having finished the zone configuration click on the button next to the drop-down list. If a zone is already selected, you can delete it by clicking on the respective button.

After having finished the *Details* configuration, click on *Save* to save the settings.

Please note

Do not forget to save! The configuration values will otherwise not be applied!

2.2.2 Settings

When clicking on a Dashboard chart an overview of tickets KB articles, expenses or tasks that have been processed in the chart is opened. On the *Settings* tab the display settings for these overviews is configured. The configuration corresponds to the configuration of the data views.

Please note

Select a column under *Available columns* and drag it to any place under *Configured columns*. Please find further information about the DataView Management in the *Administration* documentation.

2.2.3 Users

In the *Users* tab all users currently using the widget are displayed. If, for example, the global configuration of a widget shall be changed, no user is allowed to currently use the widget. It is thus possible to withdraw the widget from a user. Select the desired user and click on *Delete* in the *Actions* menu.



Figure 2.5: Withdrawing a widget from a user

Hint

You can select several users by holding the [Shift] or the [Ctrl] key and selecting the desired users.

2.2.4 Comments

In the *Comments* tab notes and comments can be entered for the widget. The comments are displayed together with the user, the date and the current status. Comments can only be displayed in master widgets. If the widget is used in the Dashboard, the *Comment* tab is not displayed in the respective widget overview.

2.2.5 History

In the *History* tab all changes performed on a widget will be displayed along with the exact time and the executing user.

3 Using the Dashboard

If a user is permitted to use the Dashboard, the *Dashboard* icon is displayed in the lower area of the screen.

Released widgets can be displayed in the Dashboard by clicking on *Add widget*, which opens a dialog that displays all available widgets in a tree view sorted by category is opened. By double-clicking on a widget or by selecting the widget and clicking on *OK* the widget is added to the Dashboard.

Widgets that have been added to the Dashboard but are minimized can be displayed by clicking on *Minimized widgets*.

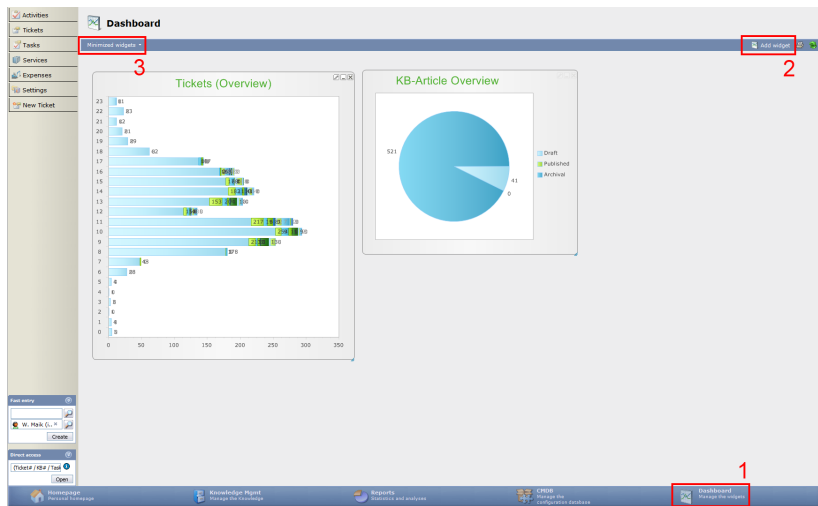


Figure 3.1: Accessing the Dashboard (1), Add widget (2), Minimized widgets (3)

3.1 Configuring the Dashboard and the Widgets

When the cursor is moved over a widget the date the widget has been generated is displayed in a tooltip. The four *configuration buttons* allow for printing, editing, minimizing and removing the widget. The *size* of the widget can be changed by dragging the widget borders.

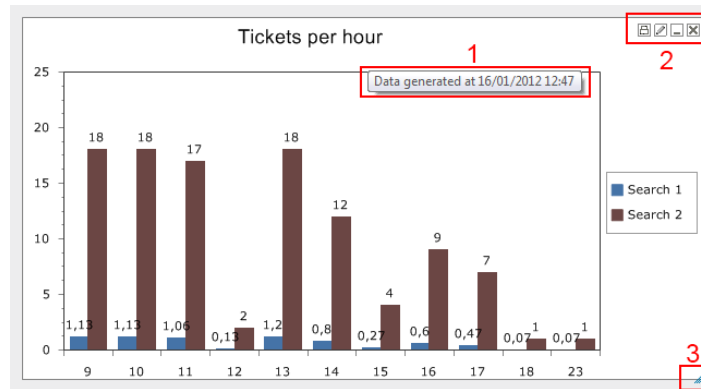


Figure 3.2: Generation date (1), configuration buttons (2), change size (3)

Hint

If a widget is minimized, its size and position are stored. The widget will be restored at the same position.

A widget can be customized by the user. By clicking on the name or, if the name is not displayed, on the *Edit* button the configuration dialog is opened. This button is always visible in the widget.

Please note

If the master widget is locked for modification, only the visual settings can be changed.

In the configuration dialog all the widget information can be configured. The status, data source and the data validity cannot be changed irrespectively of the permissions. All other configuration options correspond to those in the master widget. The tabs *Comments* and *Users* are not displayed in the user widgets.

The *Print* button allows for printing the widget. The print preview is opened where the user is able to start the printing process via the file menu.

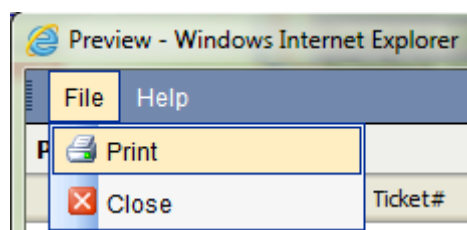


Figure 3.3: Printing a widget

Widgets can automatically be arranged in the Dashboard. Select the widget and drag it to an individual position. The widget is aligned to the grid. By holding the [Ctrl] key the widget is prevented from being aligned automatically and can be arranged anywhere in the Dashboard.

4 Example

In the following an example for the widget creation and configuration as its usage are illustrated.

For this purpose, a widget will be created to be used for comparing the ticket creation in the current and in the last month sorted by ticket schema.

4.1 Configuration

Open the Dashboard settings (SETTINGS - DASHBOARD WIDGETS) and create a new widget in the desired category. The following example demonstrates how to create a widget in the category *Ticket widgets*.

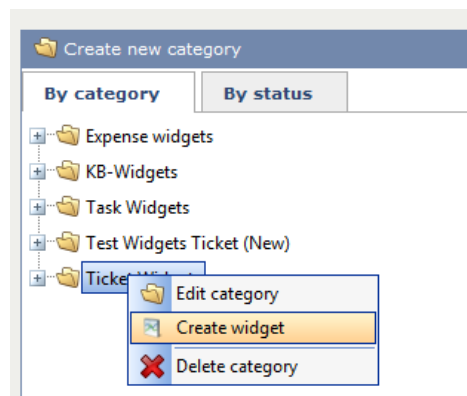


Figure 4.1: Creating the widget

Enter a **Name** and **Description** and select a **Data source** (e.g. *Ticket*) as well as the desired **Type** (e.g. a simple bar chart).

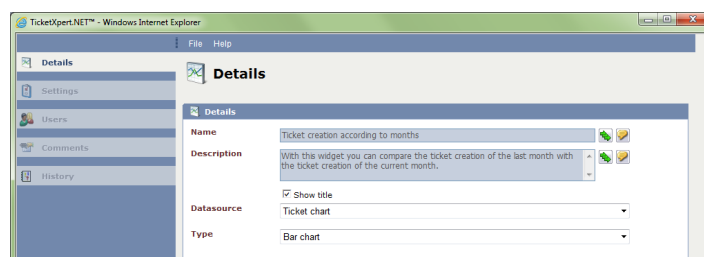


Figure 4.2: Entering the necessary information

Click on *Save* to save the settings and to continue configuring the widget.

The widget status is now set to *Draft*, which can be maintained until finishing the widget configuration and the desired results are displayed. Under **Data validity** you can select the

entry *1 day* (which represents the amount of tickets in one month, which does not change within a short period of time).

Under *Settings* you can now create the search requests. The first query collects information about the tickets created during the previous month. Enter a significant name for the query and click on the button next to the input field to open the dialog known from the extended search. Go to **Time** and click on *Creation date*. Select the predefined condition *within* and the value *Last month*. Click on *Apply* to save this search request and to create a new query for the current month. Repeat this step and select the value *current month*.

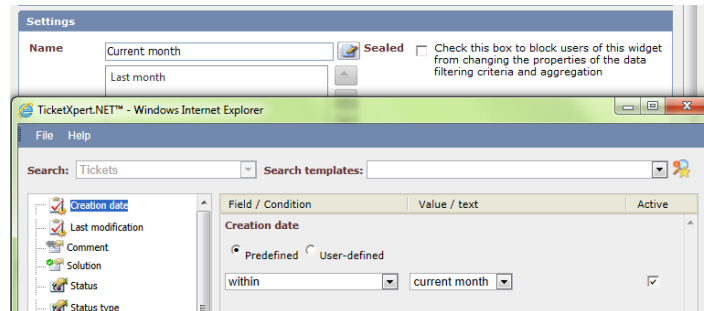


Figure 4.3: Creating the search request

In order to enable other users to customize the widget the option **Sealed** will not be activated.

Afterwards, the grouping is configured. Click on the drop-down list **First grouping** and select the entry *Schema*. It is not necessary to group by a specific schema.

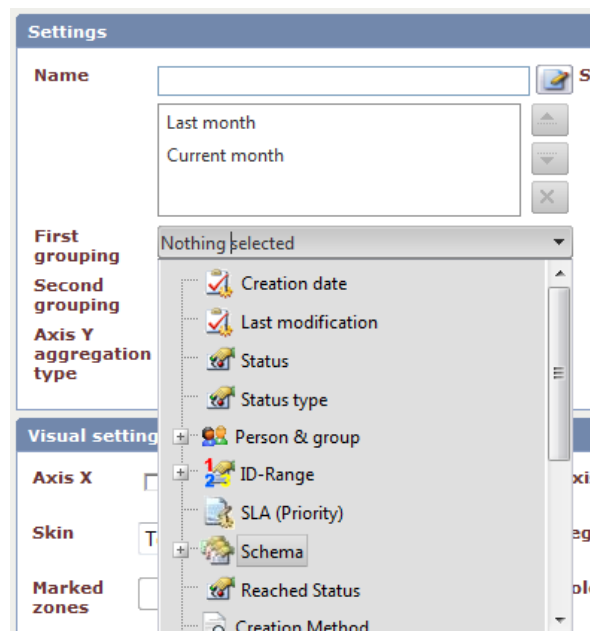


Figure 4.4: Selecting the first grouping

It is not possible to create another grouping with more than one search request. For this reason, the second grouping is deactivated. The value of the **Axis Y aggregation type** can be left at *Count*.

Afterwards, the visual settings are customized. For the purpose of a good readability of the chart the axis labels and the legend shall be displayed. Activate the option **Axis X** and/or **Axis Y** and enter the desired axis labels. Under **Legend** you can select the entry *Show legend outside chart* to display the legend on the outside of the diagram. Zones and skins are not considered.

You should now be able to see the following widget configuration dialog:

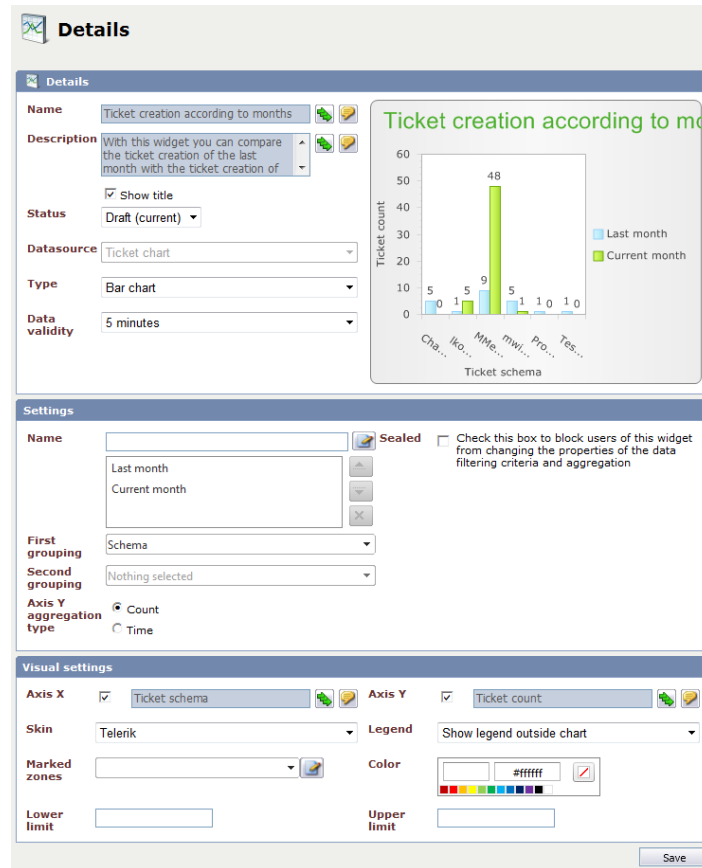


Figure 4.5: Widget settings

If the widget meets your requirements, you can now change the status from *Draft* to *Published*.

4.2 Using the Widget

If you have the rights to use the Dashboard, to access the widgets of the example category *Ticket widgets* and to view widgets having the status *Published*, you can now use the widget you have just created.

Switch to the Dashboard by clicking on the Dashboard module icon and select the *Add widget* button. Select the category the widget has been created in (example: *Ticket widgets*

and expand the view by clicking on the + icon. Select the desired widget and click on *OK*. The widget will be displayed in the Dashboard.

Although the widget does meet our requirements, it can still be optimized for comparing the desired data. For this purpose, it is possible to customize the widget. Click on the name of the widget or on the first of the three icons that are displayed in the upper right corner when hovering the widget with the cursor.

As the customization has not been disabled, the existing search parameters can be changed and extended. In order to gain a better overview of all created tickets, it is advisable to take into account the ticket creation of the last 30 days, for example. Enter a name for the search query and select *Creation date*, the condition *Within* the the value *Last 30 days*. Click on *APPLY* to finish the query.

It is furthermore possible to use a zone to display a ticket period, which is usual for an average month and a ticket schema, for example. Enter a name for the new zone under *Marked zones*, e.g. *Average change request*. Define a lower and an upper limit and select a color. Click on the button next to *Marked zones*.

For a more convenient display you can furthermore customize the skin of the widget.

Click on *Save* to save all settings. The following figure shows the widget when opened in the Dashboard.

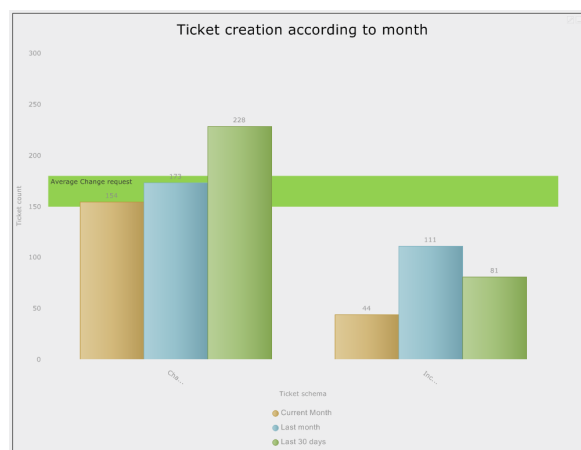


Figure 4.6: The Dashboard displaying the example widget

The above image shows a comparison of created widgets of the types *Change Request* and *Incident Request* between the current month, the previous month and the last 30 days. The legend is displayed below the chart. The colors correspond to the selected skin in the settings.


5 Statistics and Change Management

5.1 Statistics

Created by	Maik Wisatzke
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Document name	Dashboard 2015-1_EN

5.2 Change Control

Version	Date	Executed by	Comments
3.0	29.09.2011	Maik Wisatzke	Created
3.1	04.11.2011	Maik Wisatzke	Complete linguistic and content revision, example added
3.2	16.01.2012	Maik Wisatzke	Added printing function, added information about date intervals and average, added date of data acquisition for widgets, added copying master widgets
3.3	30.05.2012	Maik Wisatzke	Adjustments for version 3.8
3.8-1	12.11.2013	Maik Wisatzke/Anna Hajduk	Revision, new Screenshots
3.8-2	22.01.2014	Maik Wisatzke	New design adapted, new figures
2015-1	12.06.2015	Alexander Schmidt	Updates for 2015



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