Qv21 BI & Analytics

DASHBOARDS AND REPORTS

USER GUIDE

LOGISTICS EFFICIENCY THROUGH TECHNOLOGY & INGENUITY

Qv21 Technologies

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INTRODUCTION

Audience and Scope

This user guide is intended for Qv21customers that use Qv21 BI & Analytics to view and analyze dashboards. It provides an in-depth description of the interface, functionality, and options available in Qv21 BI & Analytics.

Overview of Qv21 BI & Analytics

Qv21 BI & Analytics is an interactive web application that provides the user interface in which your customers can view and explore dashboards. Qv21 BI & Analytics runs in popular web browsers and enables access to the server.

Requirements

Qv21 BI & Analytics runs in the following HTML5 supported browsers:

- Internet Explorer 10 and higher
- Google Chrome
- Firefox
- Safari version 7 and higher

INTERACTING WITH DASHBOARDS

Changing the Qv21 BI & Analytics Language

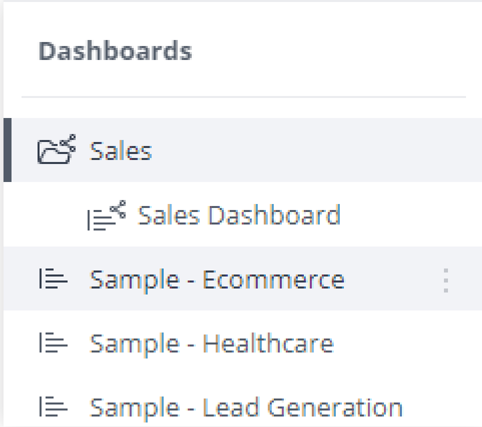
This topic discusses how Administrators can change the language of the Web Application for all of their users.

If you would like to set another language for the Qv21 BI & Analytics, you can select a language from your User Profile or from the Login page. Qv21 BI & Analytics supports the following languages:

- English
- Chinese (Simple)
- Dutch
- French (France)
- German
- Japanese
- Portuguese (BR)
- Russian
- Spanish (ES)
- Spanish (LA)
- Italian

In addition, any languages that your company have translated will appear in the list according to the name defined in the translated system files.

Viewing Dashboards

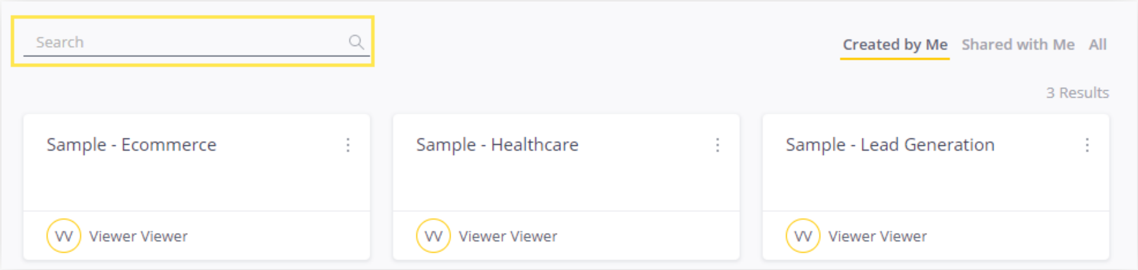


In the Analytics page, you can see a list of dashboards that were shared with you on the left or the main dashboard area below.

A dashboard that was shared with you appears with this icon in the Dashboards list.

To open a dashboard, you can click the title of the dashboard on the left side or click the dashboard tile below.

Alternatively, if you have a lot of dashboards, you can search for dashboard by typing the title in the Search field. As you begin typing, any relevant results are displayed.

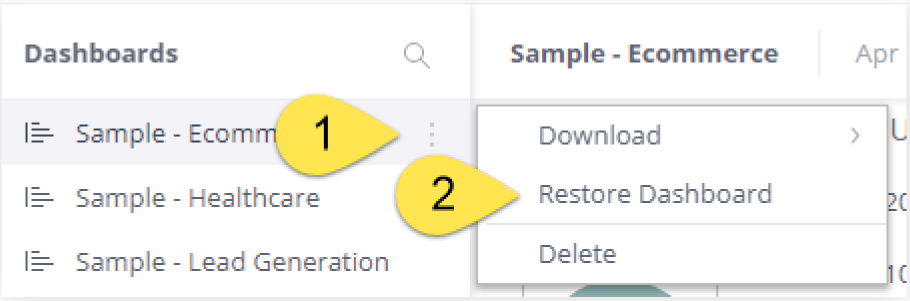


Once you've found the dashboard you're looking for, you can start exploring your data.

A dashboard is a collection of one or more widgets that visualize your data. Dashboards usually have one or more filters that affect the dashboard widgets.

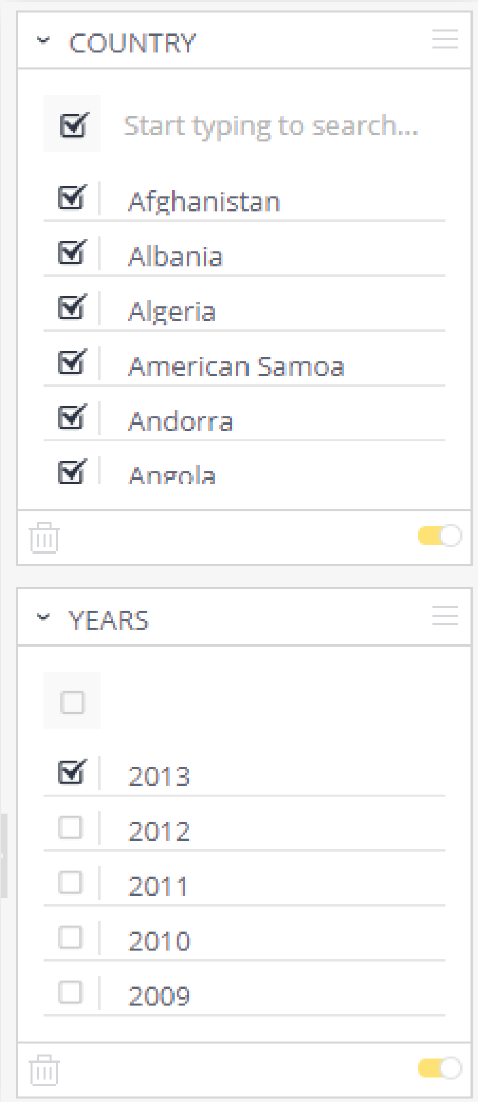
You can interact with filters for analyzing data, either through the Filters pane or by simply selecting values by left-clicking the widget visualization. Each time you interact with a filter, for example by selecting or entering a value, the filter is immediately applied to your dashboard.

You will not affect anyone else by changing the filters. In addition, you can restore the original state of the dashboard at any given point by selecting the dashboard menu item and clicking **Restore Dashboard**.

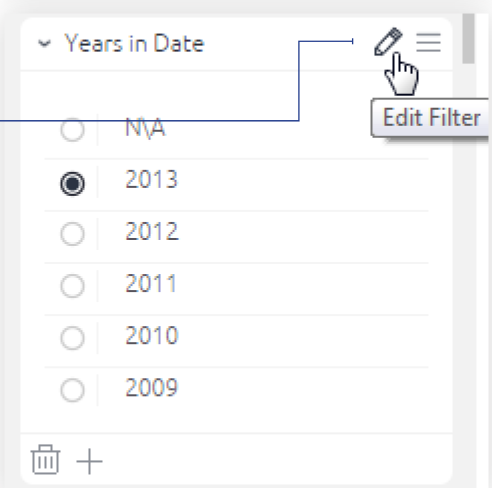


YOU CAN INTERACT WITH FILTERS AS FOLLOWS:

Make a different selection in the filter controls displayed in the Filters pane on the right side of the dashboard, as shown at the right:

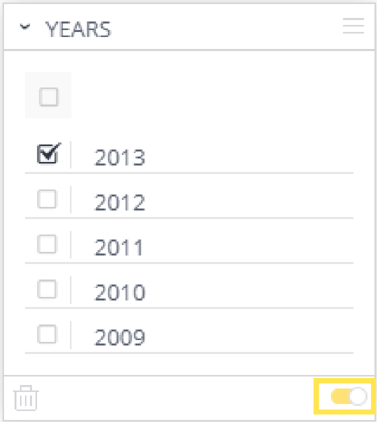


OR: Click on the pencil icon next to the filter name (shown right) in the dashboard to display the Filter Definition window.



Switching Filters On and Off

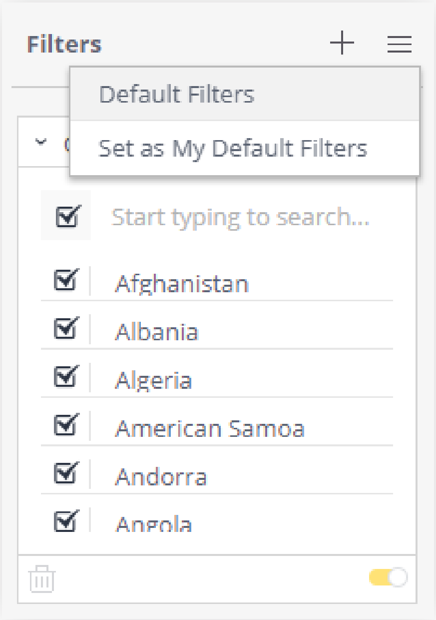
You can easily toggle filters on and off using the toggle switch. Use this option to compare states (with and without the filter), or to temporarily disable a filter, rather than deleting it.



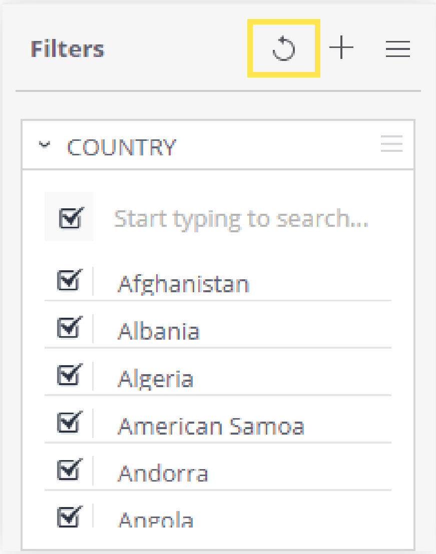
Saving Your Default Filters View

You can save the current state of your filters and their settings at any time. The current state includes the existing filters, their configuration, and the order in which they appear in the filters panel.
After making changes to any of the above settings, you will be able to restore your filters to their previously saved state.

To save your current set of filters: In the Filters menu, click Set as **My Default Filters.**



To restore a saved filters set: Click the restore icon next to the Filters menu.



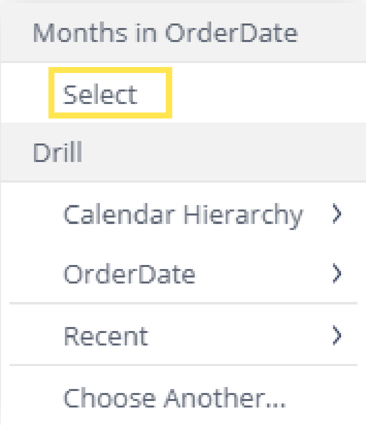
Making Selections in a Widget

You can click on a specific portion of a widget to select it. This filters the dashboard according to the selected data by adding a filter to the dashboard's Filters panel.

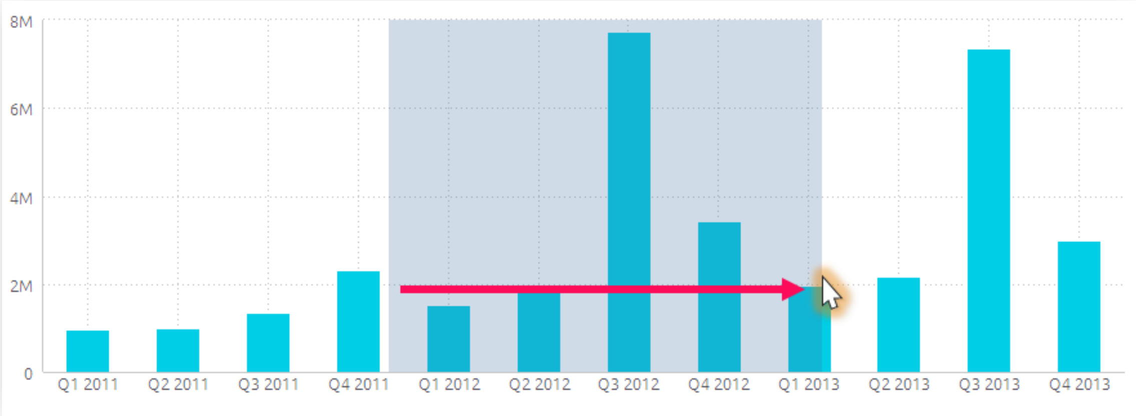
You can also use the selection to drill down in the widget (see Drilling Down in a Widget).

TO SELECT AN ITEM IN A WIDGET FOR FILTERING:

1. Left-click an item in a widget to automatically select it and add a dashboard filter according to the selection.
2. For multiple selection, use the **Ctrl** key. When released, a menu will appear. Click **Select**.



In chart widgets, you can drag and draw the area to be selected, as shown below:



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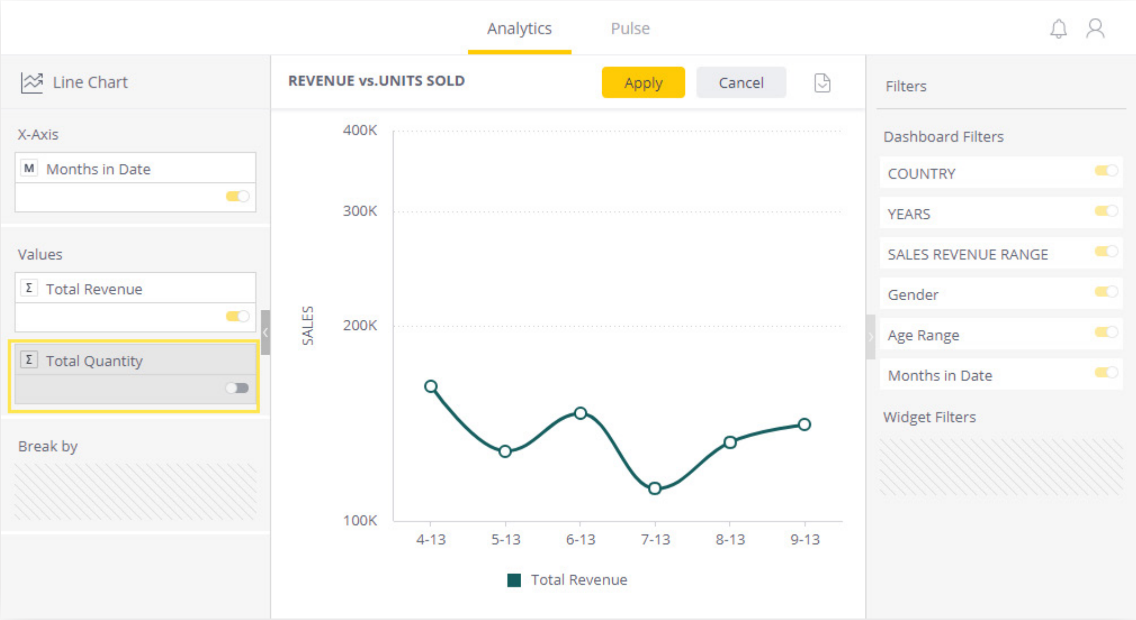
When you select a portion of the widget, ⤢ appears in the widget's menu bar. Click ⤢ to expand your view of the selection.

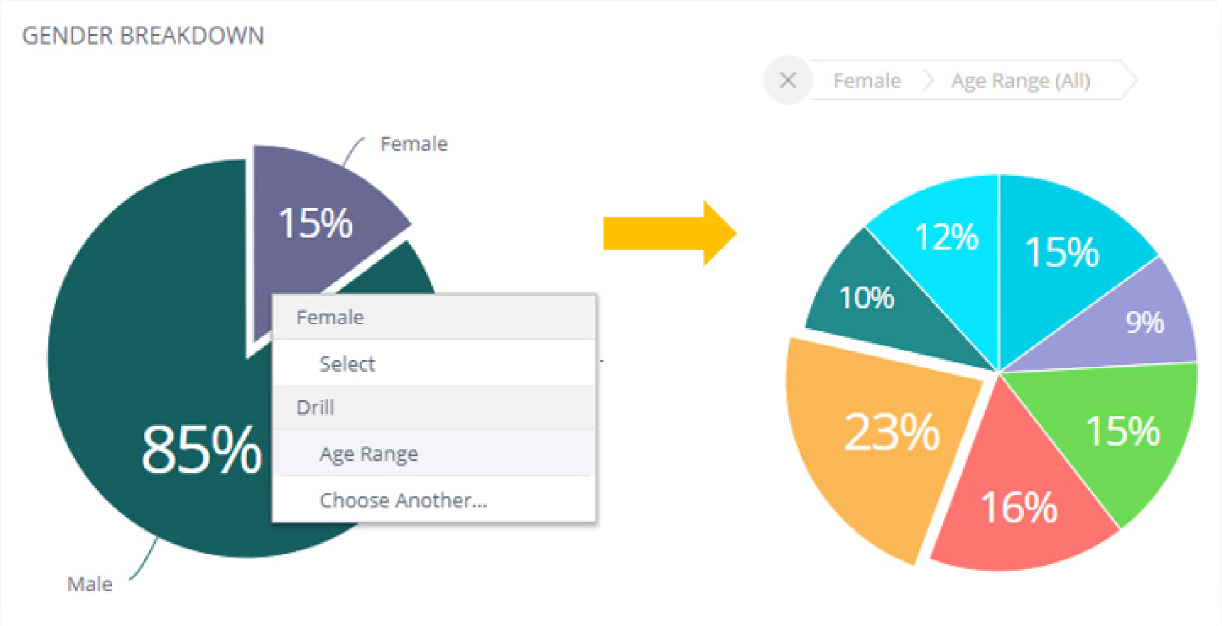
You can refine your data further by toggling the switches on the left side as shown in the example below.



Drilling Down in a Widget

You can drill down into your data in most widgets to get an in-depth view of a selected value.

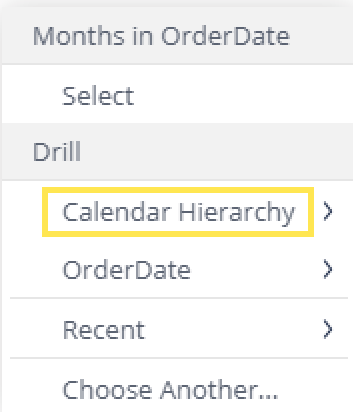
In the following example, the pie chart on the left shows a breakdown by gender. This is the original chart as created by the Dashboard's Designer. On the right side, the chart shows a breakdown or drill down showing age groups of the 'female' segment from the original pie chart.



With Qv21 BI & Analytics you can drill down from any field to any field, unless disabled by the dashboard's Designer.

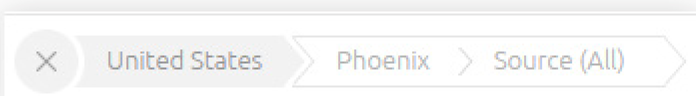
To drill down into a chart:

Right-click on the item in the widget into which you want to drill down. To manually select the drill hierarchy path, select **Drill Into**, and then in the In the Data Browser, select the field into which to drill down. If you have already drilled into this chart, then you will have shortcuts to previously selected fields, or select **Choose Another Field** to select a different field for the first time.



OR: Select a predefined drill hierarchy (if available). Predefined drill hierarchies are defined by the dashboard's owner.

To drill up to a higher level, click on a breadcrumb.
To drill all the way up, click on the **X** icon.



REPORTING

After you have viewed your dashboards, you may have discovered some insights you want to share. Qv21 BI & Analytics supports a variety of ways you can share your data with other Qv21 BI & Analytics users.

Downloading widgets and dashboards as various file types is useful for sharing your data with users or including in your reports and presentations, however, Qv21 BI & Analytics makes it easy to share dashboards directly with other Qv21 BI & Analytics users by allowing you to share the dashboard's URL from the Qv21 BI & Analytics or sending your insights via email.

The topics below describe how you can share widgets and dashboards with other Qv21 BI & Analytics users:

- Exporting Widgets
- Downloading Dashboards as an Image
- Creating PDF Reports
- Customizing PDF Reports

Exporting Widgets

You can download widgets in one of the following formats depending on the widget type:

CSV: Download the data described by the widget in a CSV file. If you have applied any filters, the filtered data is the data included in the file.

Excel: Download the data described by the widget in an Excel file. When you export a pivot table to Excel, the data that is exported is the data that is displayed in your widget. This means that any active filters, layout structure, and masks that you have applied in Qv21 BI & Analytics to your data are exported as well. For example, if you have modified how currency, percentages, or numbers are formatted in the widget in Qv21 BI & Analytics, these will be reflected in your exported Excel file. Exporting to Excel maintains your pivot's layout and structure, and values such as sub-totals, which are not maintained when you export a pivot table to CSV.

Image: You can download a widget as an image in PNG format. The image size will reflect the size of the widget on the screen when you download it. To create a larger image, enlarge the widget space in the dashboard, or open the widget in edit view, to get a bigger picture.

PDF: Download the widget as a PDF. For Table widgets, you can customize how your table is displayed in your PDF including the table's orientation and page size. In the PDF Report Settings, the first 14 pages of your Pivot table are displayed in the preview window, however, when you export your Pivot table to PDF, the entire table is included, up to 10,000 rows on multiple pages. For more information, see **Customizing PDF Reports.**

TO DOWNLOAD A WIDGET:

In dashboard view, click on the widget's menu, and select **Download** and select the relevant file type.

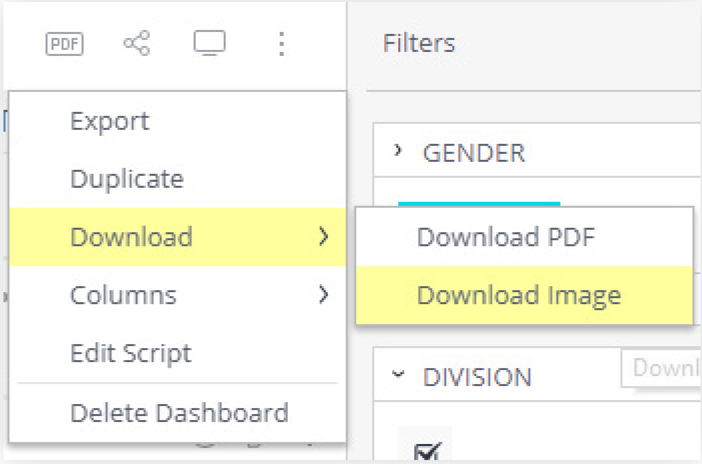
In edit widget view, click on the download icon, and select **Download** and select the relevant file type.

Downloading a Dashboard as an Image

You can download the dashboard as an image. This can be useful for including the dashboard in a presentation, website, etc.

TO DOWNLOAD THE IMAGE:

Click ⋮ at the top right of the dashboard and select **Download** » **Download Image**.

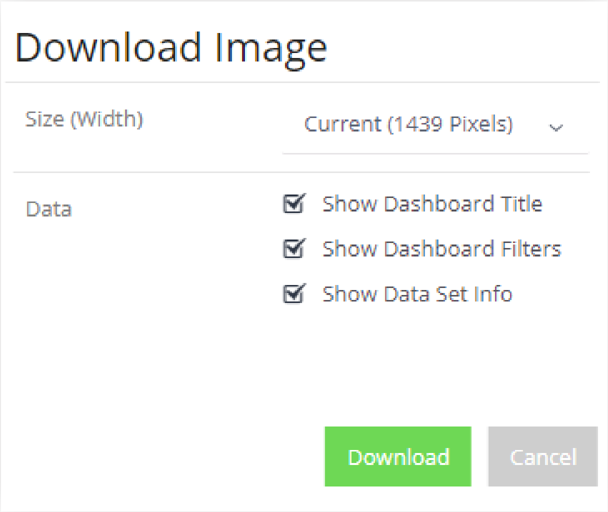


YOU CAN ALSO DEFINE THE FOLLOWING ADDITIONAL SETTINGS:

Show Dashboard Title: Turning this on will display the dashboard name at the top of the PDF.

Show Dashboard Filters: Turning this on will display a summary of the dashboard filter selections at the top of the PDF.

Show Cube Info: Turning this on will display the Cube name and last build time at the top of the PDF.



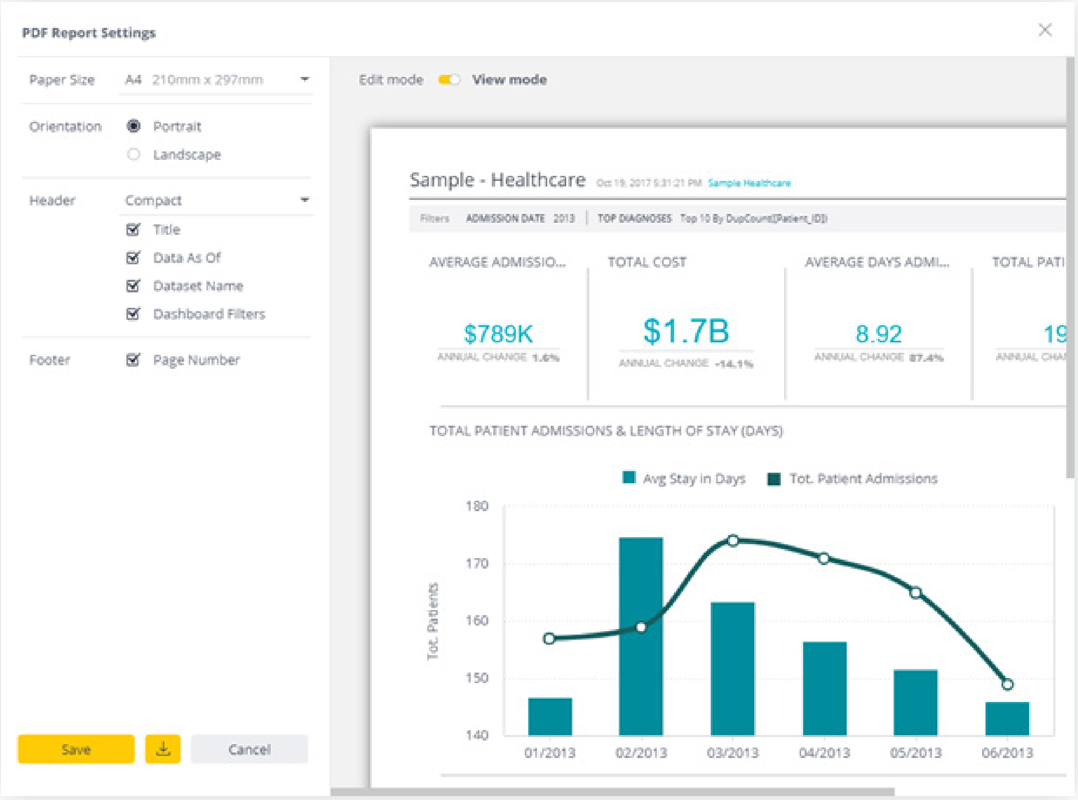
Creating PDF Reports

When you need to take copies of your dashboards with you for meetings or sharing with others, you can generate a PDF report of your dashboard.

By clicking the PDF icon on your dashboard, you can customize your dashboard's appearance through the PDF Report Settings page. After you have defined how your dashboard is to be displayed, you can download your dashboard locally as a PDF.

TO CREATE A PDF REPORT:

From your dashboard menu, click the PDF icon PDF.
The PDF Report Settings page is displayed.
Customize how your dashboard is displayed in the PDF. For more information, see **Customizing PDF Reports.**

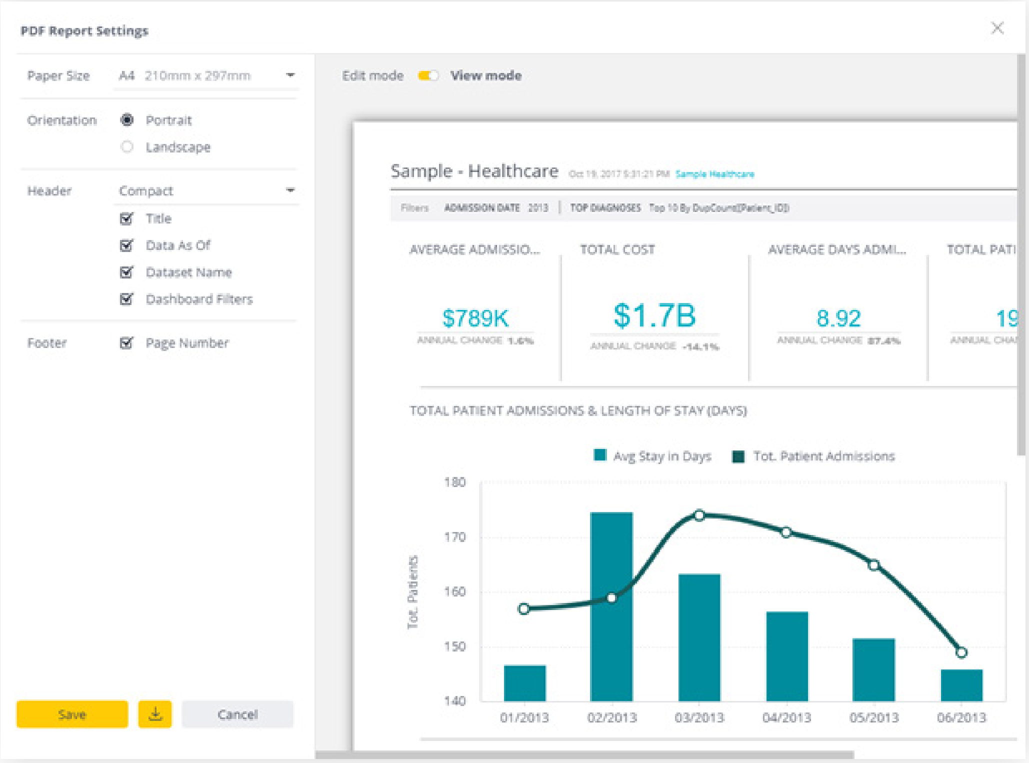


Click . The dashboard is downloaded locally as a PDF file.

Customizing PDF Reports

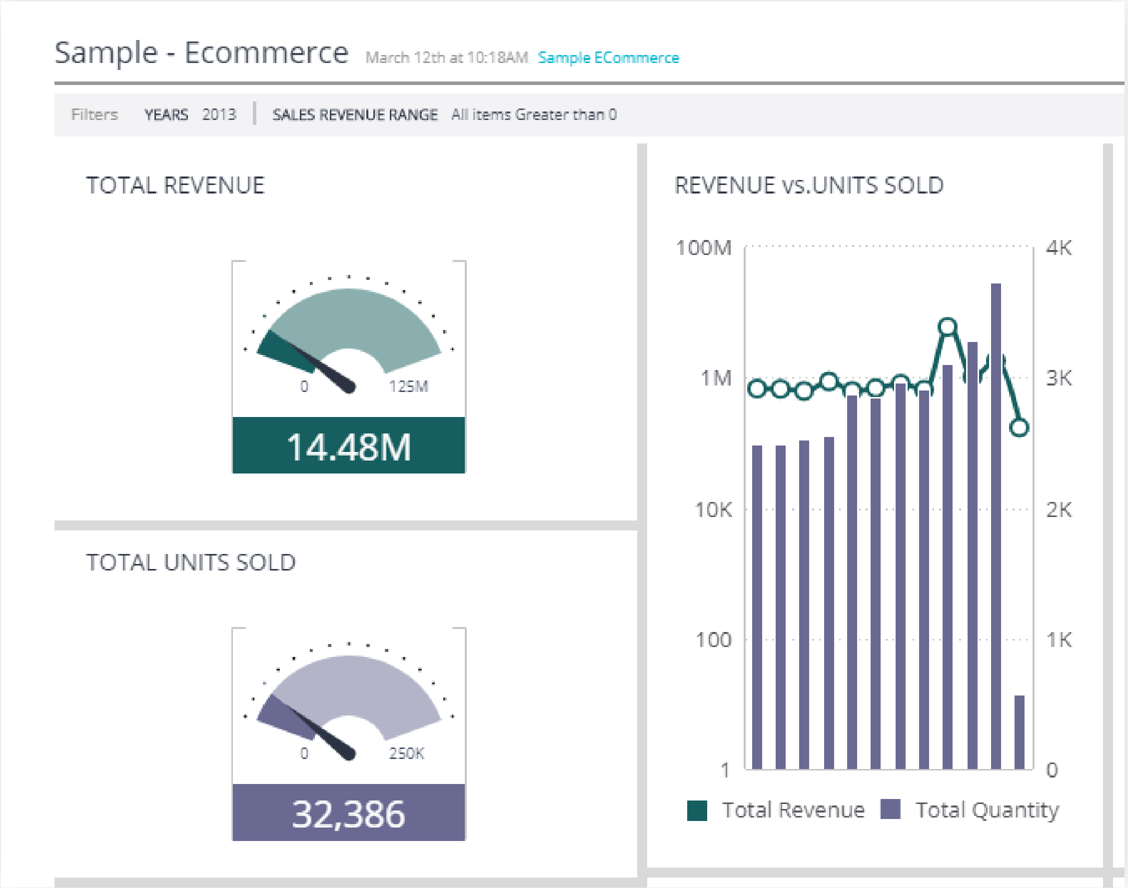
If you need to share dashboards with other users, or create a hardcopy for yourself, Qv21 BI & Analytics allows you to send an email report to your users or export your dashboard to PDF. Dashboards in email reports or PDFs though look different compared to online dashboard as they serve different purposes.

Through the Qv21 BI & Analytics PDF Report Settings, you can customize and create formatted email reports and PDFs according to your requirements. The Qv21 BI & Analytics **PDF Report Settings** allow you to define both the content and design of your report quickly and easily.



From the PDF Report Settings page, you have two modes, Edit mode, for customizing your PDF, and View mode, for seeing how the dashboard will be displayed in the PDF. In Edit Mode, all the settings you can apply to your report are displayed in the left menu.

In Edit mode, you can set the size of your widgets by selecting and dragging the borders of each widget. These borders are displayed when Edit mode is toggled on.



In View and Edit mode, you can define your dashboard's orientation, its layout, and what is displayed in the header and footer on your report. After you have customized your report, you can save the settings and use them when sharing reports, or download the report as a PDF.

To Customize the PDF Report:

In your dashboard's menu, click PDF. The PDF Report Settings page is displayed.

Edit the dashboard by selecting any of the following options:

SETTING	DESCRIPTION
PAPER SIZE	The size of the email report in the PDF.
ORIENTATION	The orientation of the dashboard in the PDF, landscape or portrait. Landscape orientations display the dashboard horizontally while portrait orientations display the dashboard vertically.
HEADER	The design and content of your report's header. The header is displayed on the top of each page or your PDF report. From the Header list, you can define how your header is to be displayed: Compact, Medium, Large, or No Header. After you have set the design, you can determine what information is included in the header. **Title**: Select to display the dashboard name at the top of the PDF. **Dashboard As Of**: Select to display the Cube name and last build time at the top of the PDF. **Dataset Name**: Select to display the name of the Cube that contains the dashboard's data. **Dashboard Filters**: Select to display dashboard filter selections.
FOOTER	The content displayed in the footer section of each page of your report. You can display the following information: **Page Number**: Select to display the page number on each page of the report.

Click **Save** to save your settings when sharing reports or to download your report.

Qv21 BI & Analytics Pulse

Qv21 BI & Analytics Pulse is a centralized location where you can stay on top of your most important KPIs across multiple dashboards or manage your data alerts.

For example, you can consolidate and monitor important aspects of your business by adding important values from widgets from various dashboards to the Qv21 BI & Analytics Pulse page.

Then, you can create alerts to notify you when certain thresholds are met or anomalies in your data are detected. Qv21 BI & Analytics Pulse provides you with access to your most important data and notifies you when to take action.

Creating Data Alerts

This topic describes data alerts and how you can add them to Qv21 BI & Analytics Pulse.

Data alerts are triggered by conditions you define for your widgets. For example, if you have an Indicator widget that represents your company's revenue, you can define an alert that notifies you when this revenue reaches or falls below a certain threshold.

Qv21 BI & Analytics supports alerts for the following widgets:

- Indicator Widgets
- Area Chart Widgets
- Bar Chart Widgets
- Column Chart
- Line Chart

For each type of widget you can add to Pulse, you can monitor a single value. For example, for Column charts you can monitor a single section (value) of a column. To monitor multiple values, you can add each value you want to monitor to Pulse separately.

When creating data alerts, you define the condition that triggers the alert. Qv21 BI & Analytics provides three alert conditions that can trigger an alert:

THRESHOLD

Qv21 BI & Analytics notifies you when a threshold is reached following a build. This condition is useful for monitoring metrics that follow a regular, cyclical schedule.

AUTOMATIC

Qv21 BI & Analytics automatically notifies you when the Qv21 BI & Analytics alert engine identifies an anomaly in your data based on machine learning algorithms. The Qv21 BI & Analytics algorithm actively learns from your data and eliminates noise to identify anomalies in your data. Qv21 BI & Analytics's anomaly detection is based on a smoothing algorithm that takes the latest values into account. The more times a Cube is built, the more accurate Qv21 BI & Analytics becomes at identifying any anomalies and notifying you.

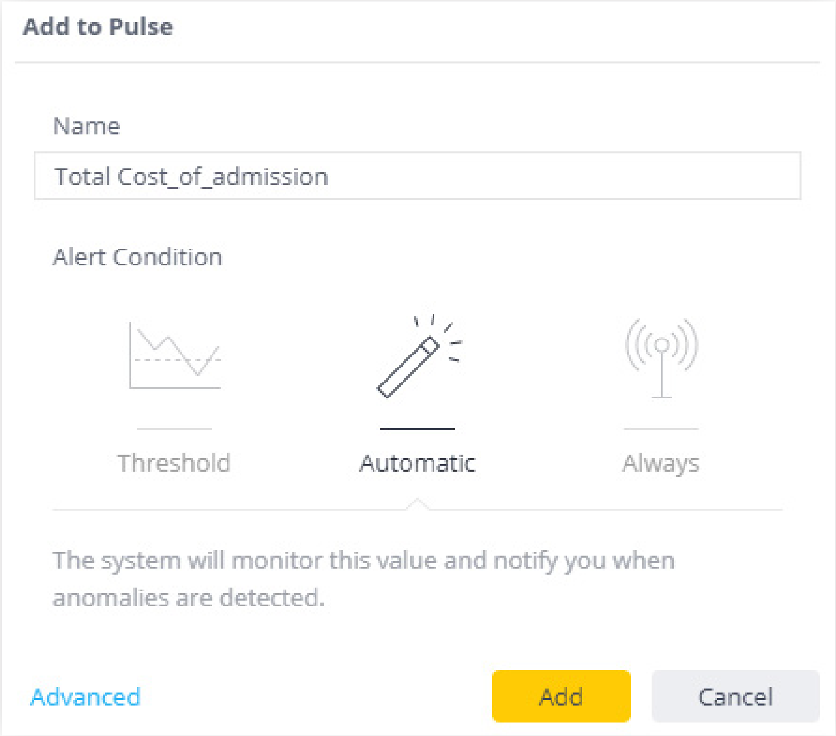
ALWAYS

Qv21 BI & Analytics notifies you after each build, regardless if there is a change in your data or not.

In addition, you can configure advanced settings that determine who receives the alert and what channel the alert is sent through. For more information see **Advanced Settings.**

To Create a Data Alert:

From the widget's menu, select **Add To Pulse**. The Add to Pulse window is displayed.



In the **Name** field, enter a meaningful name that represents your alert.
In the Alert Condition area, select the condition that triggers the alerts.
Click **Add** to create the alert. The alert is added to Qv21 BI & Analytics Pulse.

For additional advanced configuration options, see **Advanced Settings.**

Advanced Settings

By default, when an alert is triggered, you are notified via your email address registered with Qv21 BI & Analytics.

You can also send alerts using more advanced configurations that can notify you across multiple channels, and allows you to customize the message displayed in the notification.

The following topics describe the functionality available in the Advanced Settings options:

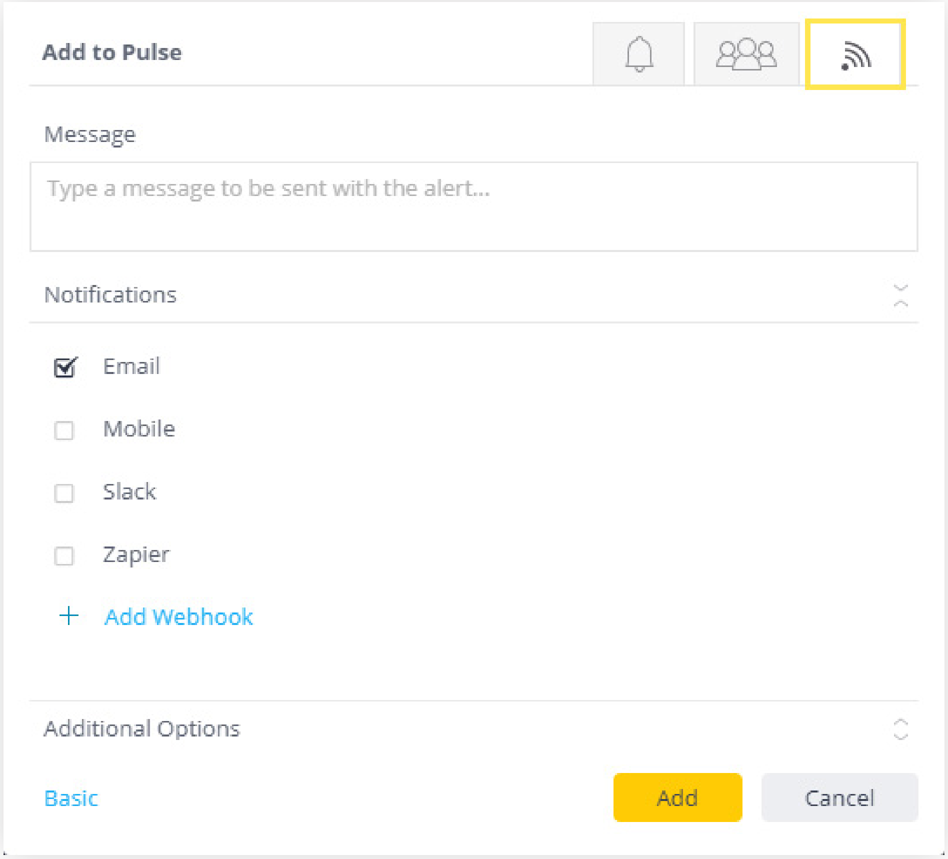
- Setting Notification Channels
- Customizing Notification Messages
- Configuring Additional Options

Setting Notification Channels

By default, your users are notified via their email addresses registered with Qv21 BI & Analytics. In addition, Qv21 BI & Analytics supports a variety of workflows by sending notifications across multiple applications and services. For example, your users can receive notifications through the Qv21 BI & Analytics mobile application, Zapier, Slack, and other 3rd services via webhooks.

TO DEFINE HOW USERS ARE NOTIFIED:

For Data Alerts, select **Advanced Options** > .



In the Notifications area, select the relevant channel for your notification. The default channel, Email, is already selected.

You can select one or more of the following channels:

- Email
- Mobile
- Slack
- Zapier
- Webhook

CLICK **SAVE**.

Slack

Slack is a real-time team collaboration messaging platform that allows you to receive incoming Webhooks from external sources such as Qv21 BI & Analytics.

To send notifications through Slack, you need to enter the URL and optionally, your Slack channel or username, where the notification is to be displayed.

You can ask your Administrator to provide you with the Slack URL and channel.

Zapier

Zapier is an online service that lets you create automated actions connecting disparate business apps and services such as Qv21 BI & Analytics.

To receive notifications through Zapier, you must create a Zap and provide the server with the relevant URL when configuring your alerts' notifications.

When an alert is triggered, Qv21 BI & Analytics sends the notification to the Webhook you define in Zapier.

You can ask your Administrator to provide you with the Zapier URL.

Webhooks

Webhooks are a system of automated notifications that indicate that an event occurred, in this case an alert being triggered. To send notifications through additional 3rd party channels, you can select **Webhook** and enter the Webhook name and URL.

Your Webhook server listens for incoming messages from Qv21 BI & Analytics across the URL specified in the URL field.

You can ask your administrator to provide you with the Webhook URL.

Customizing Notification Messages

By default, the following message is provided in your email alert notifications:

Hi, The latest value in the KPI that you are monitoring is:

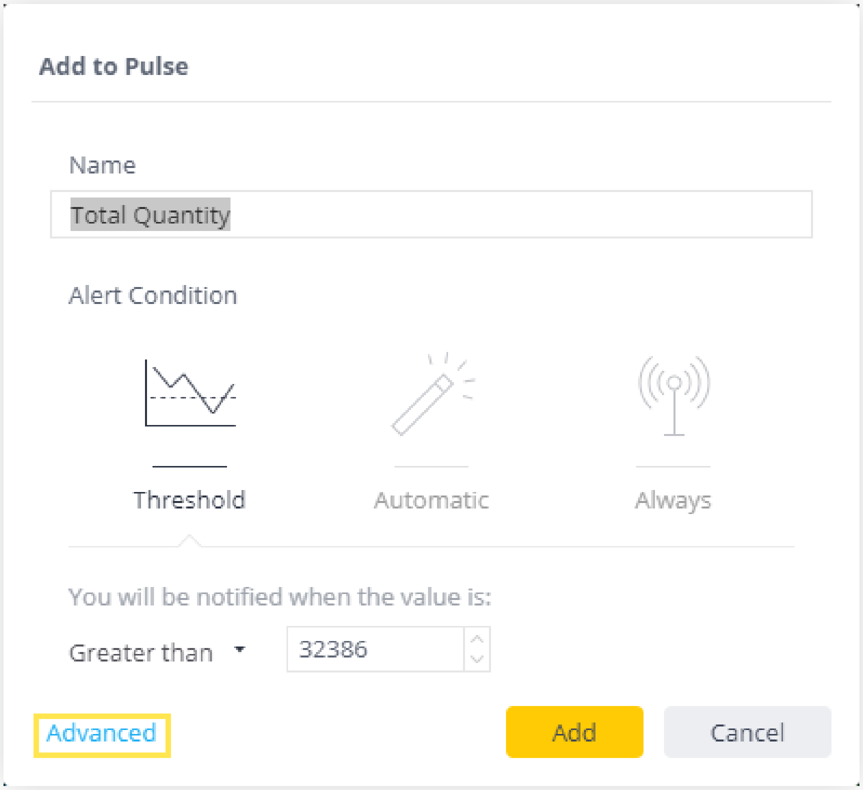
Value
You can provide customized messages for your notifications when configuring your alert through the alert's Advanced Settings.
The message you provide replaces the string: The latest value in the KPI that you are monitoring is:

For example, if your message is "The last value of my KPI is:" the message in your alert's notification will be:

Hi, The last value of my KPI is:

Value

TO CUSTOMIZE YOUR NOTIFICATION'S TEXT:



For Data Alerts, select **Advanced** > .

In the Message area, enter your custom text.
Click **Save**.
The next time a notification is sent, your custom message is displayed in the notification.

Configuring Additional Options

You can configure how often and when a notification is sent after an event is triggered. For example, you can limit the amount of notification sent to one when a data alert is triggered. This is useful if you build your Cubes frequently, but do not need multiple notifications.

TO CONFIGURE ADDITIONAL OPTIONS:

When adding or editing a widget to Pulse, in the Advanced Options window, select >**Additional Options**.
Select any of the following options:
    Select **Notify only once after a condition is met** to limit how many notifications are sent after an event occurs.
Click **Add** to save the alert.

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