Version 4.0

FileDirector®
ELECTRONIC CONTENT MANAGEMENT

Dashboard
Quick Guide

Spielberg
POWERED BY EFALIA

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FileDirector Dashboard

Overview



FileDirector Dashboard is implemented into and directly connected to FileDirector WebServer.

It can provide information about utilisations within FileDirector BusinessProcessManagement and about values, connected to existing entries in FileDirector fields. The information is provided in diagram format, whereas the format and the shown information is adaptable.

FileDirector Dashboard offer three types of data sources.

Process overview

This data source contains all processes with the total documents on each process of the specific cabinet.

Process detail view

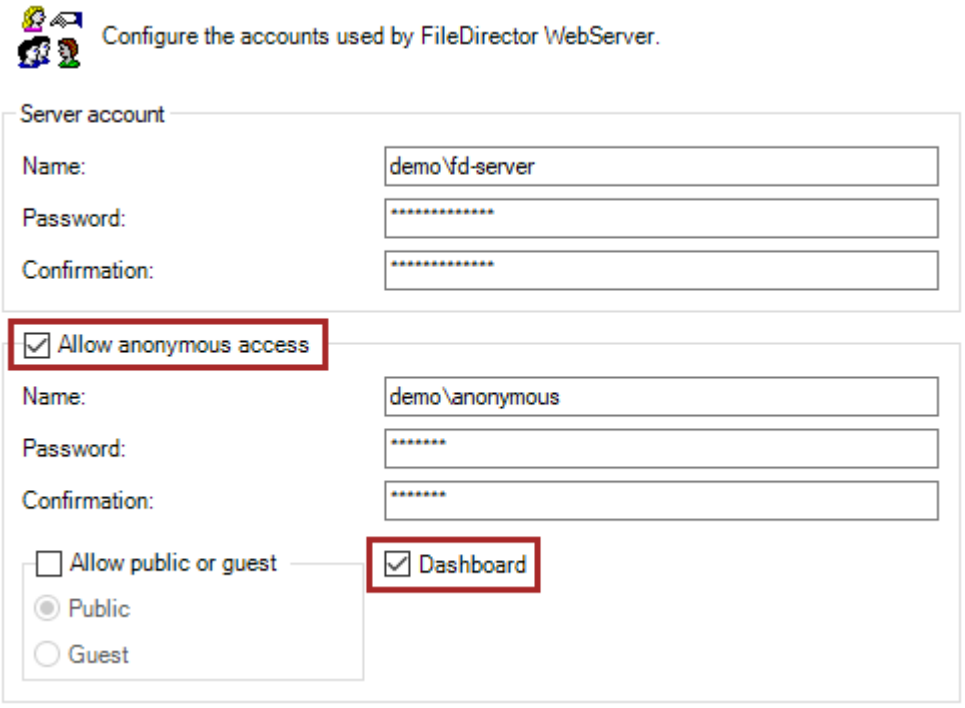
This data source contains all processes with all process steps and the total count of documents for each process step of the specific cabinet.

Document Index Fields

This data source uses information of a specified document type. Compared to the other two sources, this one is not directly linked to user action steps within process management.

Settings in ConfigUtilityWeb

Accounts Tab



Allow anonymous access

The account, given here, is used for one or both of the options *Allow public or guest* and *Dashboard*.

> *Note:*
> *It is strongly recommended that the user account, used for the option* Allow anonymous access, is not a member *of the FileDirector* fd-admins *group.*
> *Otherwise, the automatic refresh of the Dashboard will not work, due to security reasons.*

Dashboard

This checkbox must be ticked. Otherwise, FileDirector Dashboard can't use the account, given above, for e.g. automatic refresh of the created Dashboards.

Settings in EnterpriseManager



The node Dashboard in FileDirector EnterpriseManager provides the *Settings* for the FileDirector Dashboard. These settings contain of two tabs, *Settings* and *Data sources*.

The Dashboard node can be found within each cabinet and the settings are valid for all corresponding dashboards of the respective cabinet.

Tab: Settings

Within this tab, timer values and font sizes can be set.

> *Note:*
> *These settings are valid for all dashboards of the respective cabinet.*

Timer

Data refresh (min)

The FileDirector Dashboard updates the data according to the interval set *FileDirector EnterpriseManager* for the corresponding cabinet.

The default value is 20 minutes.

> *Note:*
> *The minimum value here is 5 minutes and the maximum value 60 minutes.*
> *If the website is updated or reloaded, using F5, the data source will not be updated.*
> *The data is only being updated according to the interval value set in the FileDirector EnterpriseManager.*

Tab page switch (min)

The *Tab page switch* option defines the change interval in minutes for tab containers.

The minimum value is *1* minute and the maximum value is *20* minutes.

The default value is *5* minutes.

> *Note:*
> *The switch interval is only active in* Show Mode.

Font size

The section *Font size* within the *Settings* allows to change the size of the used font for different sections of the Dashboard.

> *Note:*
> *These values are global values and valid for all created dashboards and diagrams of the corresponding cabinet.*

Title

Dashboard

The default value is *13*pt.

The value can be altered by using  on the right hand side.

> *Note:*
> *The maximum value is 35pt.*

Toolbar

The default value is *13*pt.

The value can be altered by using  on the right hand side.

> *Note:*
> *The maximum value is 35pt.*

Diagram

Chart

The default value is *13*pt.

The value can be altered by using  on the right hand side.

> *Note:*
> *The maximum value is 35pt.*

Pie

The default value is *13*pt.

The value can be altered by using  on the right hand side.

> *Note:*
> *The maximum value is 35pt.*

Grid

The default value is *13*pt.

The value can be altered by using  on the right hand side.

> *Note:*
> *The maximum value is 35pt.*

Treemap

The default value is *13*pt.

The value can be altered by using  on the right hand side.

> *Note:*
> *The maximum value is 35pt.*

Pivot

The default value is *13*pt.

The value can be altered by using  on the right hand side.

> *Note:*
> *The maximum value is 35pt.*

Gauge

The default value is *13*pt.

The value can be altered by using  on the right hand side.

> *Note:*
> *The maximum value is 35pt.*

Tab: Data sources

This tab provides the additional settings for the data sources *Document index field* and *Process detail view*, which, unlike the data source *Process overview*, can be combined with FileDirector fields.

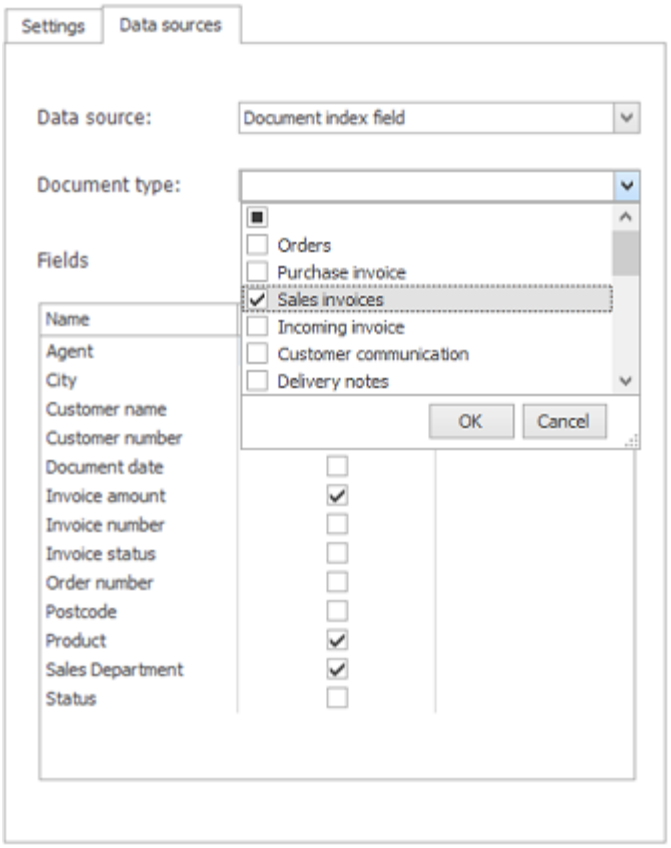
Note:
These settings are valid for all dashboards of the respective cabinet.

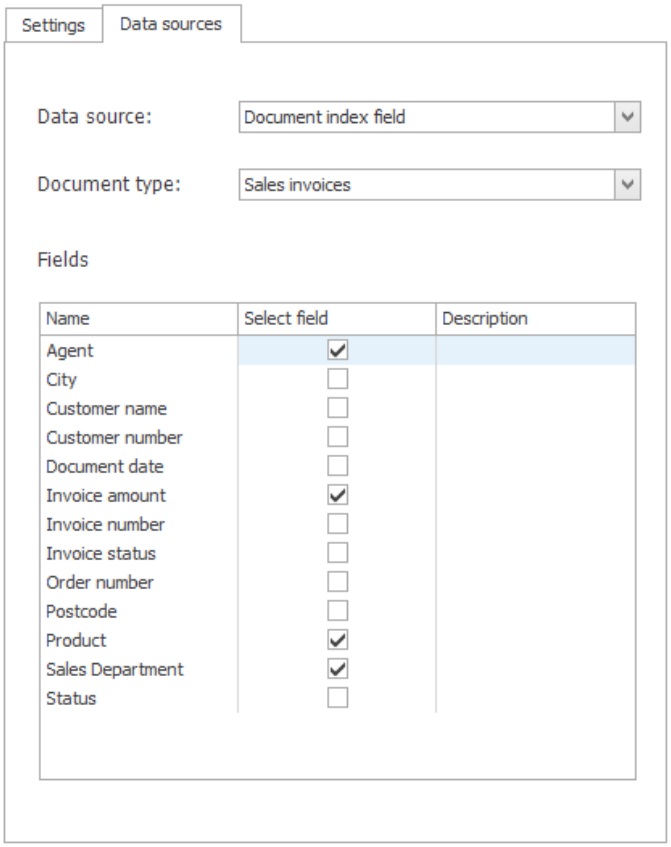
The drop-down menu *Data source* shows the two internal sources *Document index field* and *Process detail view*.

The drop-down menu *Document type* shows the available document types of the corresponding cabinet.

Multiple document types can be selected.

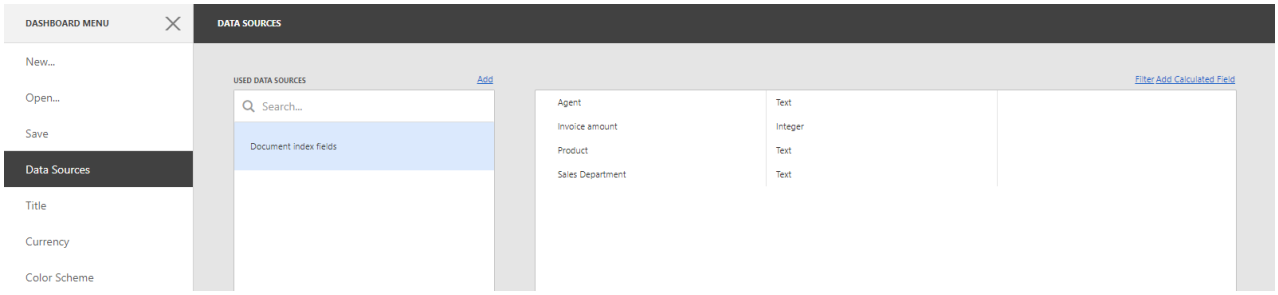
Example





In this example, only the document type *Sales invoices* and the following fields of this document type are selected for the use in FileDirector Dashboard, in combination with the data source *Document index field*:

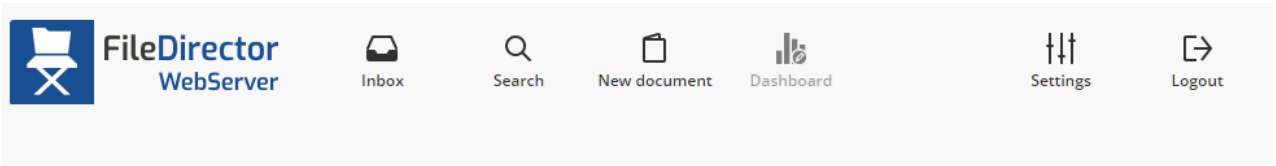
- Agent
- Invoice amount
- Product
- Sales Department



Storage location of Dashboard Settings

The settings of FileDirector Dashboards are stored within the *dbo.settings* of the corresponding cabinet's database.

Dashboard Desktop



The Dashboard button is only visible but disabled for all users of FileDirector WebServer. At least one of the following rights on cabinet level is needed to access FileDirector Dashboard, in view or edit mode:

Dasboard View

Dashboard Edit

The button is enabled after selecting either the area *Inbox*, *Search* or *New Document*.

Note:
Please check FileDirector EnterpriseManager Guide ⇨ Cabinet Security *for further information.*

Open FileDirector Dashboard

There are two ways to open FileDirector Dashboard, either using the URL or the Dashboard icon of FileDirector WebServer.

Note
Using a URL is not available for FileDirector Cloud.

URL

FileDirector Dashboard can be opened directly in Edit mode or Show mode, using a URL.

Example URL for edit mode (without specifying a dashboard)

http(s)://myDomain/myServer/web/dashboard/edit?cabinetID=MyCabinetID

If a specific dashboard is to be opened directly, the URL from the example above can be extended to include the name of the dashboard.

The name of the dashboard is entered here, including any spaces.

Example URL for edit mode (with specifying a dashboard)

http(s)://myDomain/myServer/web/dashboard/edit?cabinetID=MyCabinetID&dashboard=My Dashboard

> *Note:*
> *The following right on cabinet level is needed:* Dashboard Edit.

Example URL for show mode (without specifying a dashboard)

http(s)://myDomain/myServer/web/dashboard/show?cabinetID=MyCabinetID

If a specific dashboard is to be opened directly, the URL from the example above can be extended to include the name of the dashboard.

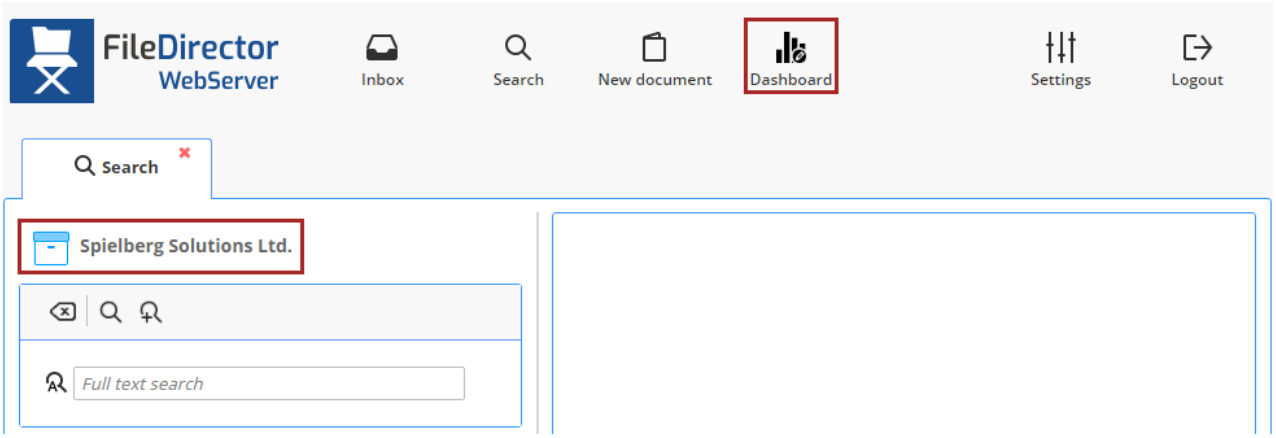
The name of the dashboard is entered here, including any spaces.

Example URL for show mode (with specifying a dashboard)

http(s)://myDomain/myServer/web/dashboard/show?cabinetID=MyCabinetID&dashboard=My Dashboard

> *Note:*
> *The following right on cabinet level is needed:* Dashboard View.

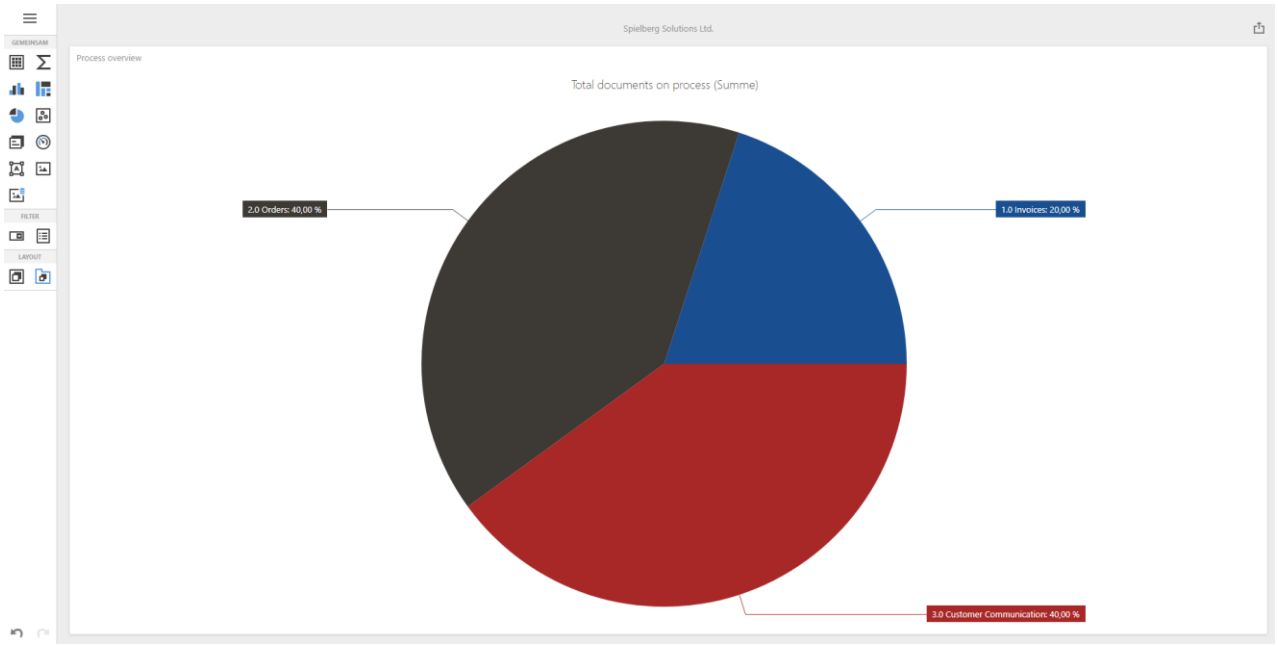
FileDirector WebServer



After selecting an area and the selection of a corresponding cabinet, the fields are listed within the tab and the *Dashboard* button becomes enabled.

> *Note:*
> *The content, displayed in FileDirector Dashboard, is directly linked to the selected cabinet of the active workarea. The three different areas are* Inbox, Search *and* New Document.

Admin Desktop/Edit Mode



In default, FileDirector Dashboard desktop shows the control box on the left hand side and the tabs *Processes overview* and *Process detail view* within the large area, next to the *Control box*.

Create a Dashboard

Types of Data Sources

There are *three* types of data sources – *Process overview*, *Process detail view* and *Document Index Fields*.

Process overview

This data source contains all processes with the total documents on each process of the specific cabinet.

Process detail view

This data source contains all processes with all process steps and the total count of documents for each process step of the specific cabinet.

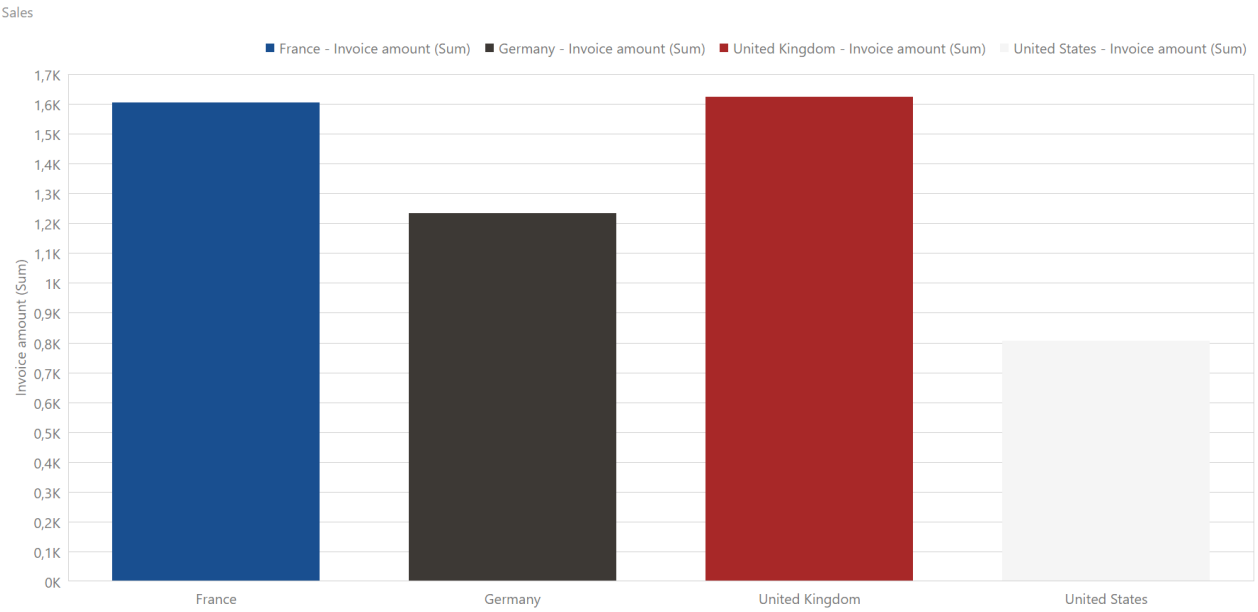
Document Index Fields

This data source uses information of a specified document type. Compared to the other two sources, this one is not directly linked to user action steps within process management.

Diagram Axis

In diagram types with *x-axis* and *y-axis*, the setting Arguments defines the *x-axis* and the Values setting defines the *y-axis*.

Example



The *x-axis* shows the different *countries*.

The *y-axis* shows the *Invoice amount (sum).*

Colouring Arguments

Options



Coloring

FileDirector Dashboard allows to allocate an individual colour scheme to diagrams.

This option must be enabled manually.

1. Select the diagram.
2. Go to *Options* on the left-hand side of the diagram.
3. Select *Coloring*.
4. Set *Arguments – XXX* to *On*.
5. Now, open the *Dashboard menu* and select *Color Scheme*.
6. Set the element to the preferred colour, using *Hex values*.

Dashboard menu



The Dashboard menu provides options e.g. for creating new dashboards, saving changes in existing dashboards or editing the colour scheme.

New...

After selecting *New...*, a unique and descriptive name should be provided in the section *Dashboard Name* and one of the two data sources must be selected. This can be either *Processes overview*, *Process detail view* or *Document Index Fields*.

The examples given below, add *Process overview* for *Used Data Sources*.

The other data source can be selected and added later on.

> *Note:*
> *The name of a FileDirector Dashboard must be unique. Otherwise, the new Dashboard cannot be created.*

Create a diagram

FileDirector Dashboard provides multiple types of diagrams. These are shown in the *Common* section of the Dashboard menu.

 Grid

 Pivot

 Chart

 Treemap

 Pies

 Scatter chart

 Cards

 Gauges

 Text box

 Bound image

Choose one of the types, shown above by dragging it from the tool box to the dashboard area.

New FileDirector Dashboards open blank and must be configured after creation.

Binding



These configurations can be done through the option menu on the left-hand side of the new diagram.

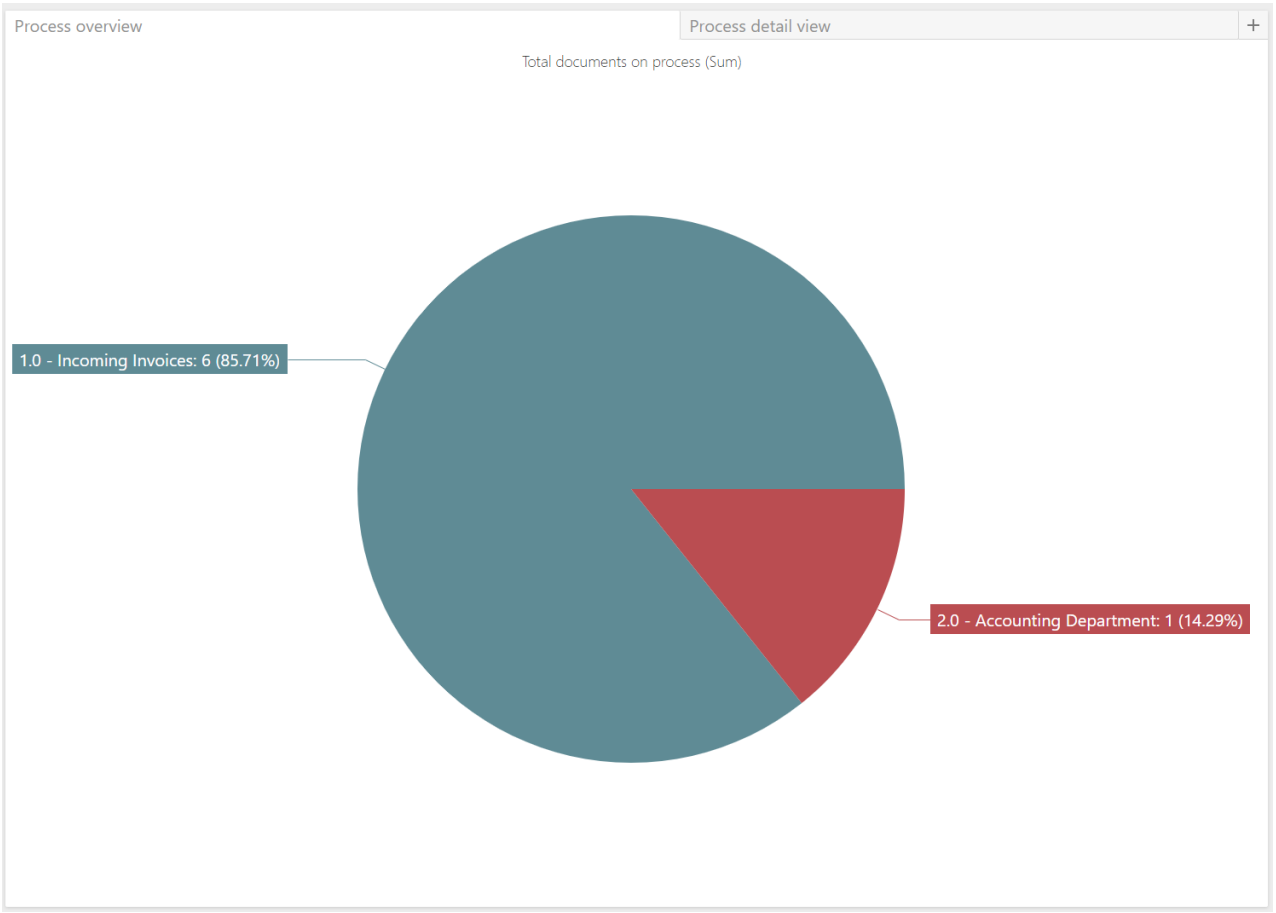
The first step is the setup of the arguments and configuration of the corresponding parameters. This is done within the menu *Binding*.

Example

1. Select *Chart* from the *Common* section.
2. Go to *Binding* on the left-hand side of the selected chart diagram.
3. Start with the definition of the arguments and select *Add Argument*.
4. Within the extended menu, now opening to the right, select *Process name* for this example.
    a. This argument is being used for the X-axis of this chart diagram.
5. After selecting an Argument, go to *Add Values* and choose, in this example, *Total documents on process*.
    a. This argument is being used for the Y-axis of this chart diagram.

As soon as documents hit *User action* process steps, the counters of the diagram start to change.

Based on this example, the diagram will show all processes and the total count of documents on each process.



Note:
The dashboard, shown above, does use default layout and colour settings.

Two data sources in a single dashboard

Both data sources can be used with a single dashboard.

Example

1. Go to the *Dashboard menu* on the top left side.
2. Select *Data Sources* from the unfolding menu.
3. The left column shows *Used Data Sources*. Select *Add* and the the data source you want to add from pop-up window.
    a. As *Process overview* has already been selected when creating the dashboard, in this example, only *Process detail view* and *Document index fields* would be available to add.

    For this example, please select *Process detail view*.
4. Close the *Dashboard menu* and go back to the diagram.
5. Go to *Binding* on the left-hand side of the selected chart diagram.
6. Select Data/Filtering and click on the preferred data source.
7. Confirm the selection with OK.

Note:
Changing the data source will remove all previously set arguments and values.

Display a single process

Filtering Data Sources

Data sources can be filtered.

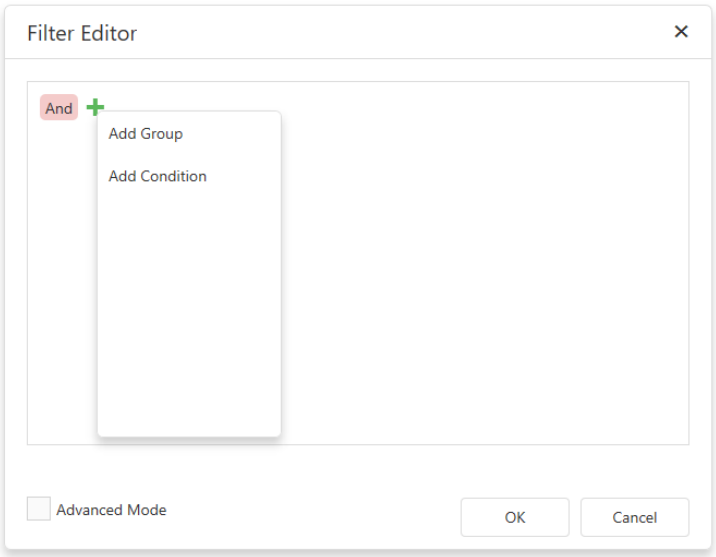
Note:
These filter settings are global for all diagrams of a dashboard.

Example

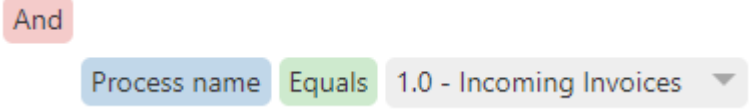
1. Click on the diagram area and select *Binding*, shown on the right hand side of the diagram.
2. Select *Data/Filtering*.



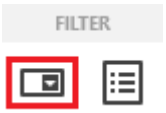
3. Click on *Click to set Filter Criteria*.
    a. The Filter Editor opens in a separate window.
    b. Now, hover over And and a green + icon appears.



4. Select *Add Condition*.
5. The example of a filter, given below, will only show the process 1.0 Incoming Invoices.
    a.



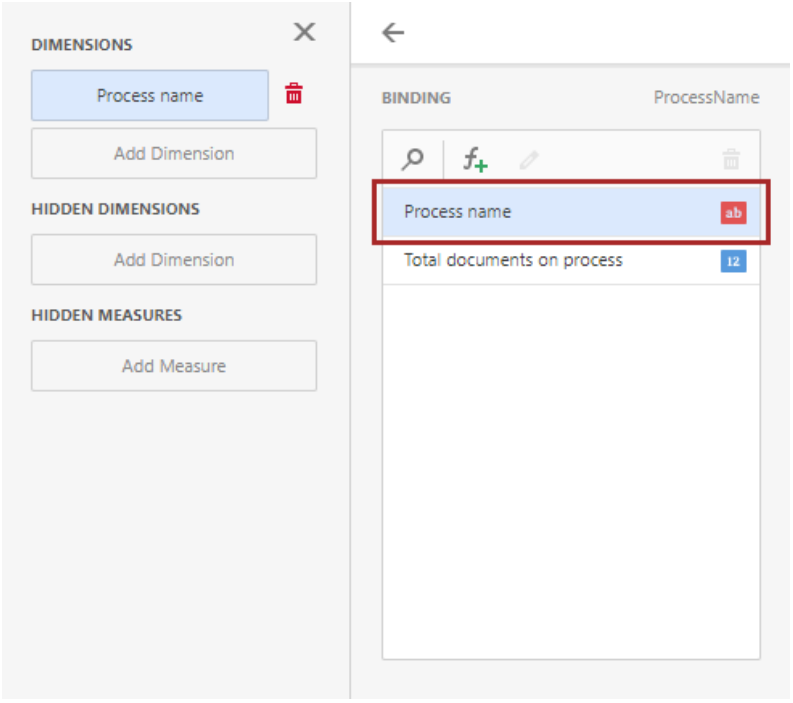
Filtering using the Combo Box



The *Dashboard toolbar* area *Filter* offers a *Combo Box* option.

This option allows a variable filter, which can be selected from a drop-down menu.

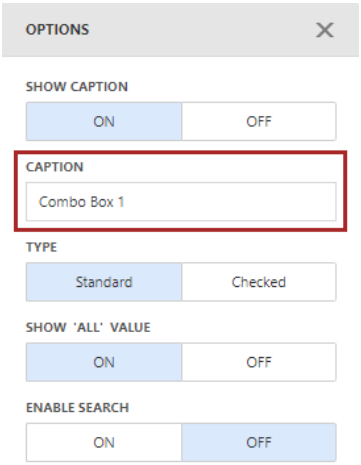
1. Select from the Dashboard toolbar *Filter* ⇨ *Combo Box*.
    a. The *Combo Box* is shown below the diagram.
2. Select *Binding* from the control of the *Combo Box*.
3. Under "*Dimensions*" click "*Add Dimension*"
4. Select the filter for example "*ProcessName*"



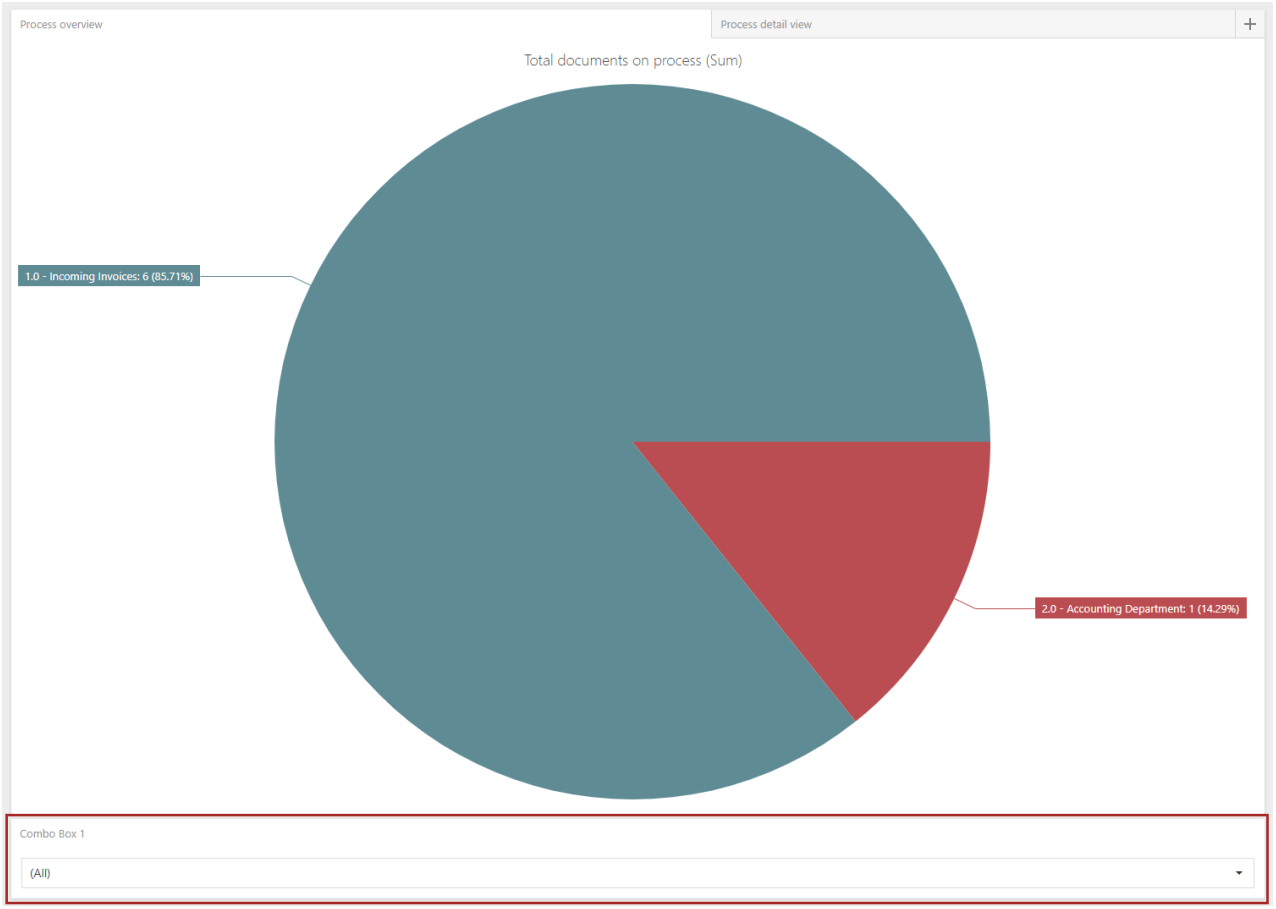
This allows a user of FileDirector Dashboard to filter the information by process name, using a drop-down list.

The default name of this element is *Combo Box 1* and can be altered into a more descriptive name in *Options* ⇨ *Caption*.

Dashboard



Example



Layout

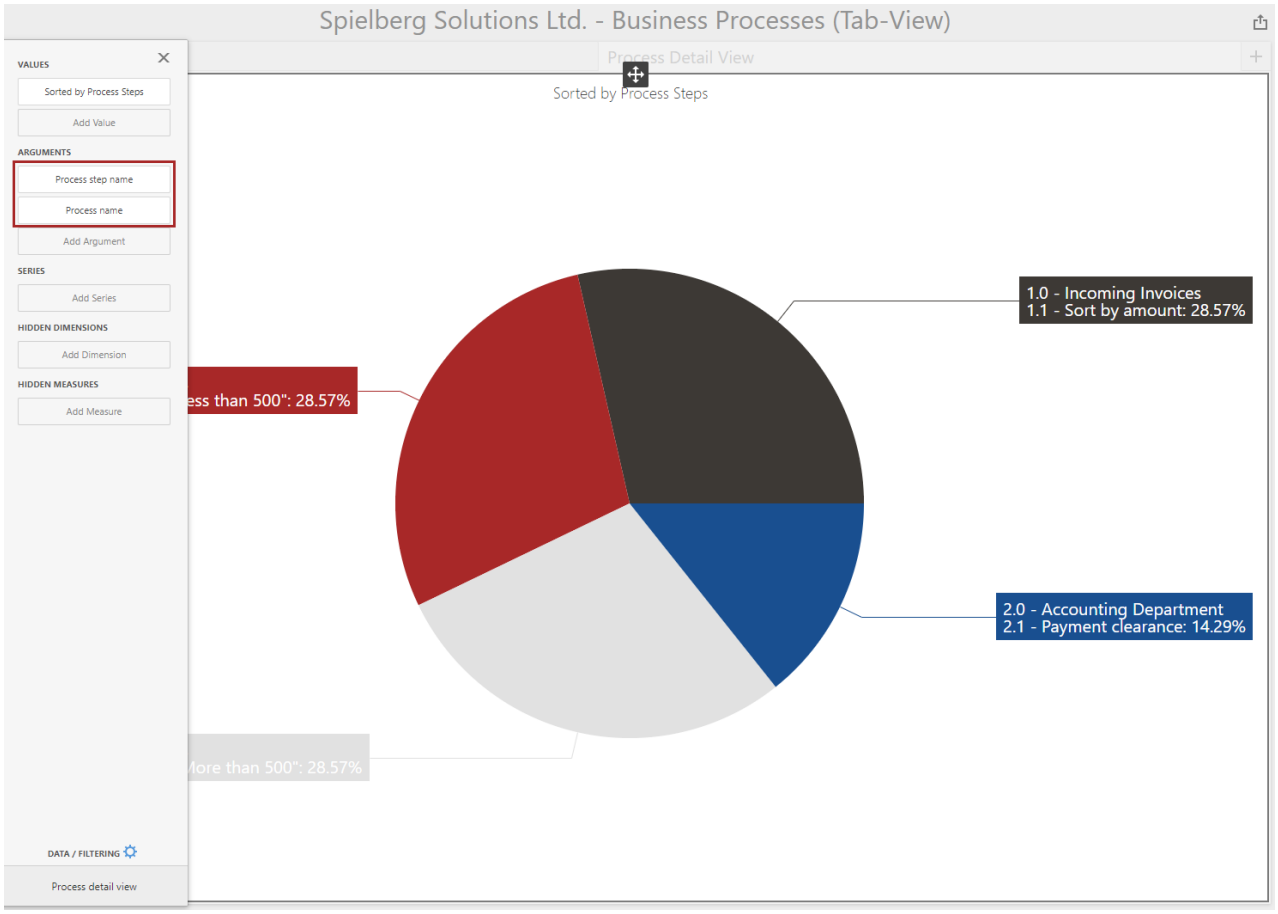
FileDirector Dashboard offers two layout options. These options do not differ if only a single diagram is displayed. As soon as two or more diagrams are to be displayed in a single dashboard, the layout, selected at the beginning of the design process, is important.

Note:
Even though, the selected diagram type can be converted and altered at a later stage, the selected layout option cannot.

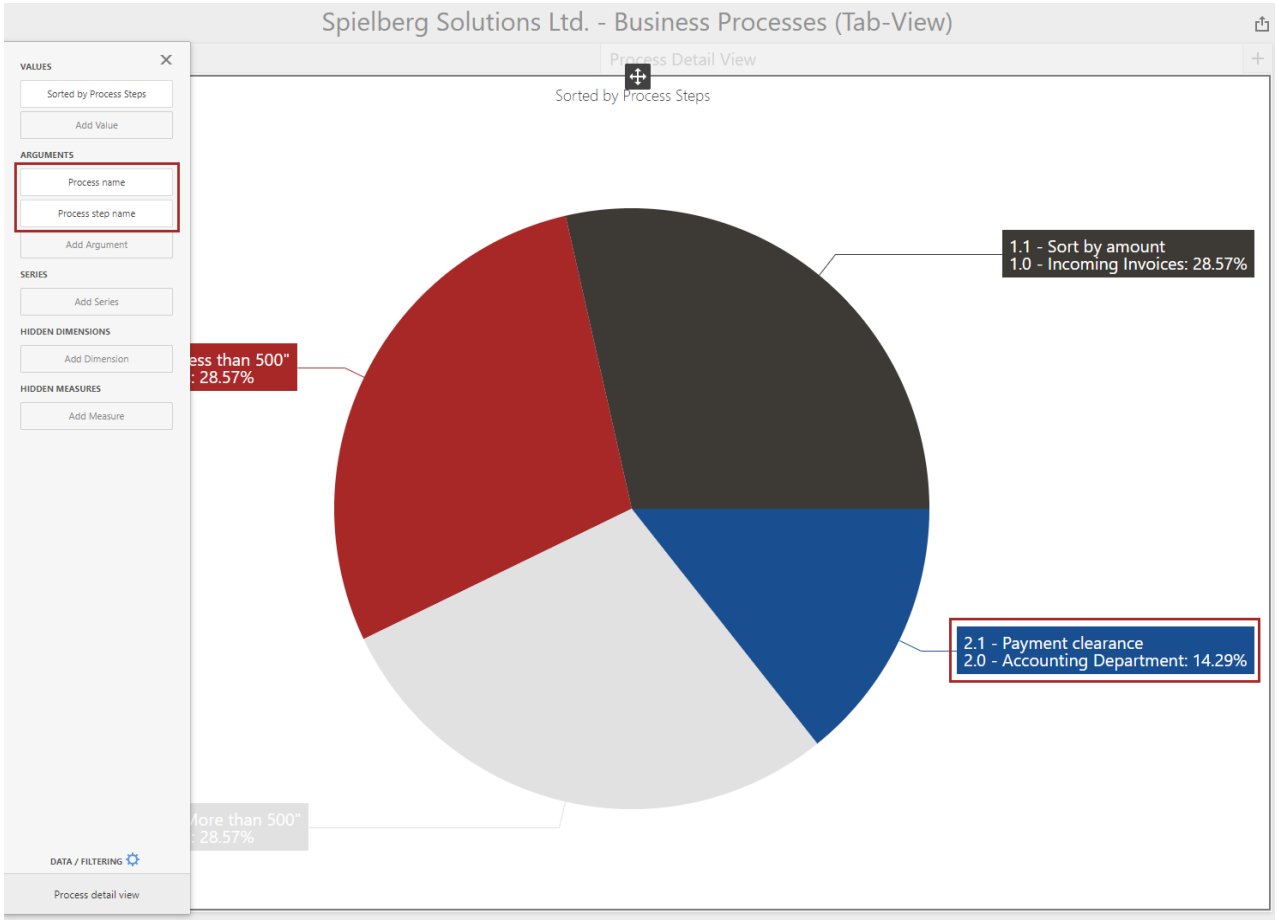
Order of Arguments

The order of the arguments, shown within a label of a diagram depends on the order, the arguments have been added to the *Bindings*.

Example



VS.



Group



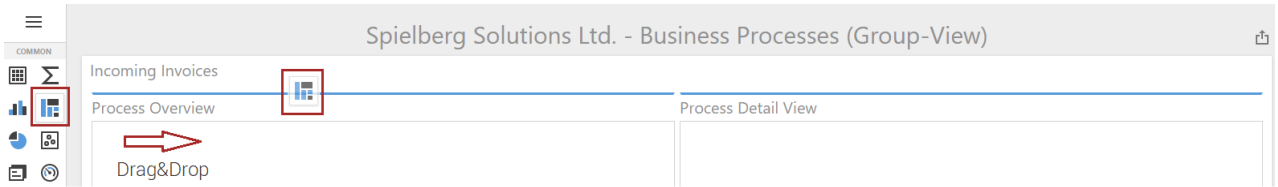
The option *Group* shows multiple diagrams of the same dashboard simultaneously.

Add a diagram

If an addition diagram is needed at a later stage, it will be added by a simple drag&drop action.

Select a diagram from the *Common* section and drag it on the existing group. A horizontal line will appear and the additional diagram can be placed.

Example



Note:

See the light blue horizontal line above the two existing diagrams Process Overview *and* Process Detail view.

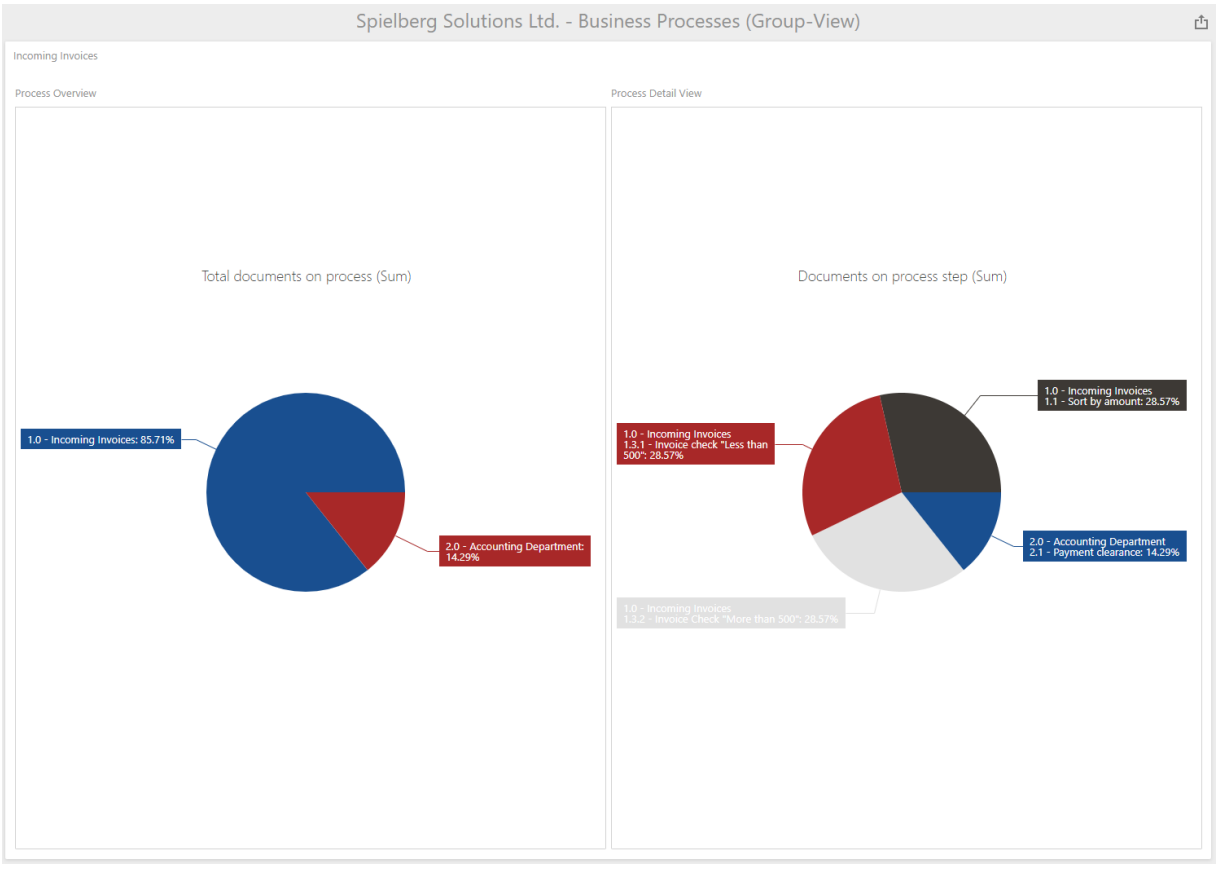


In this example, the new diagram was placed above the two existing diagrams.



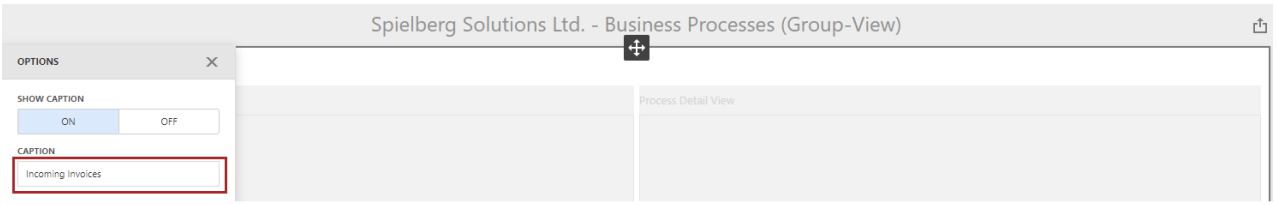
The final position of the diagram can be changed afterwards.

Result

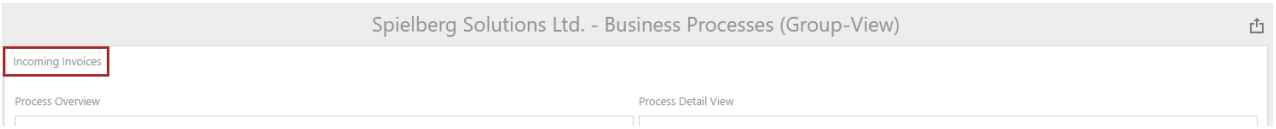


The selected diagram format is *Pies*.

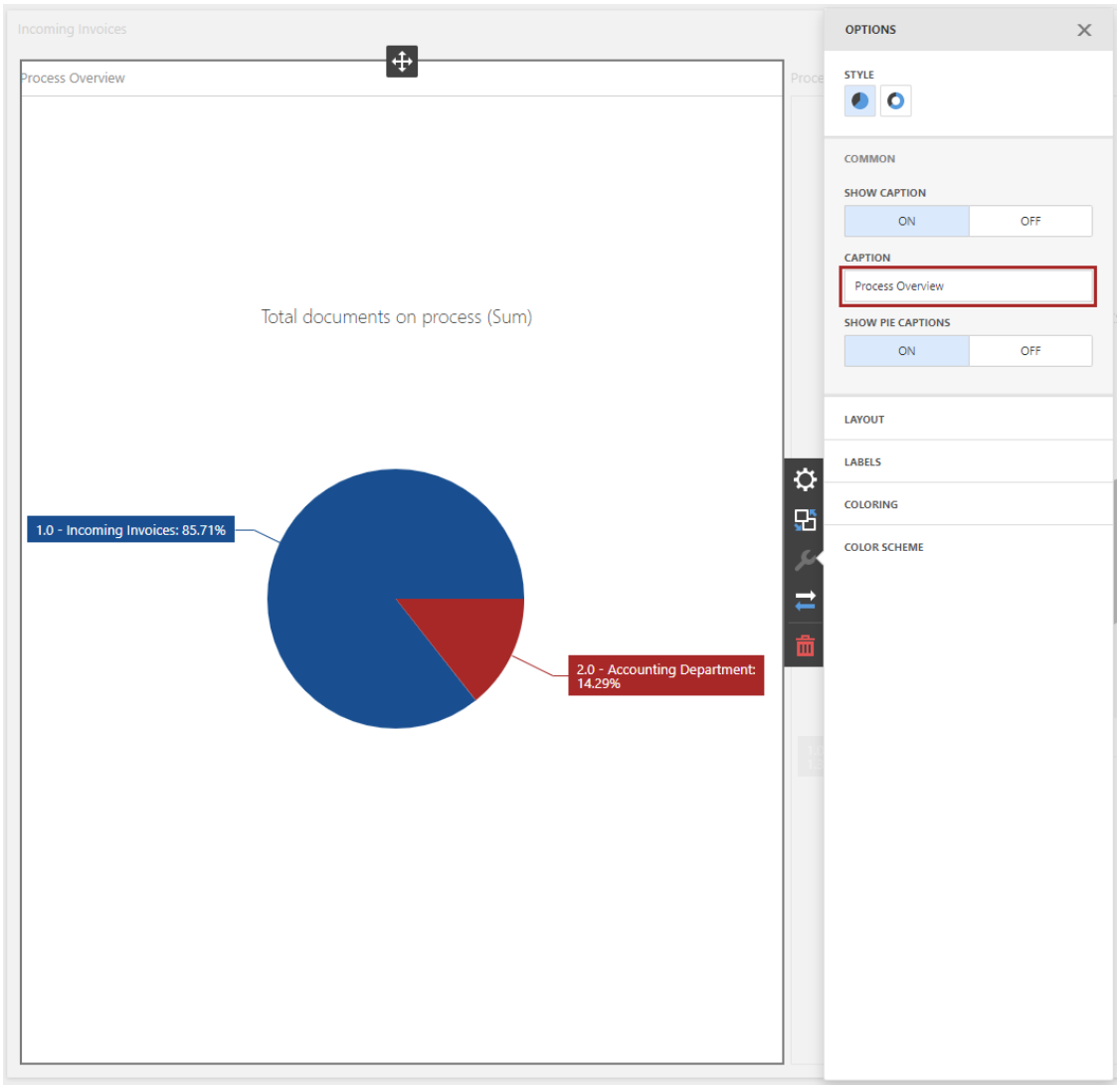
Within the *Options* menu of the group, the group was renamed from *Group 1* to *Incoming Invoices*:



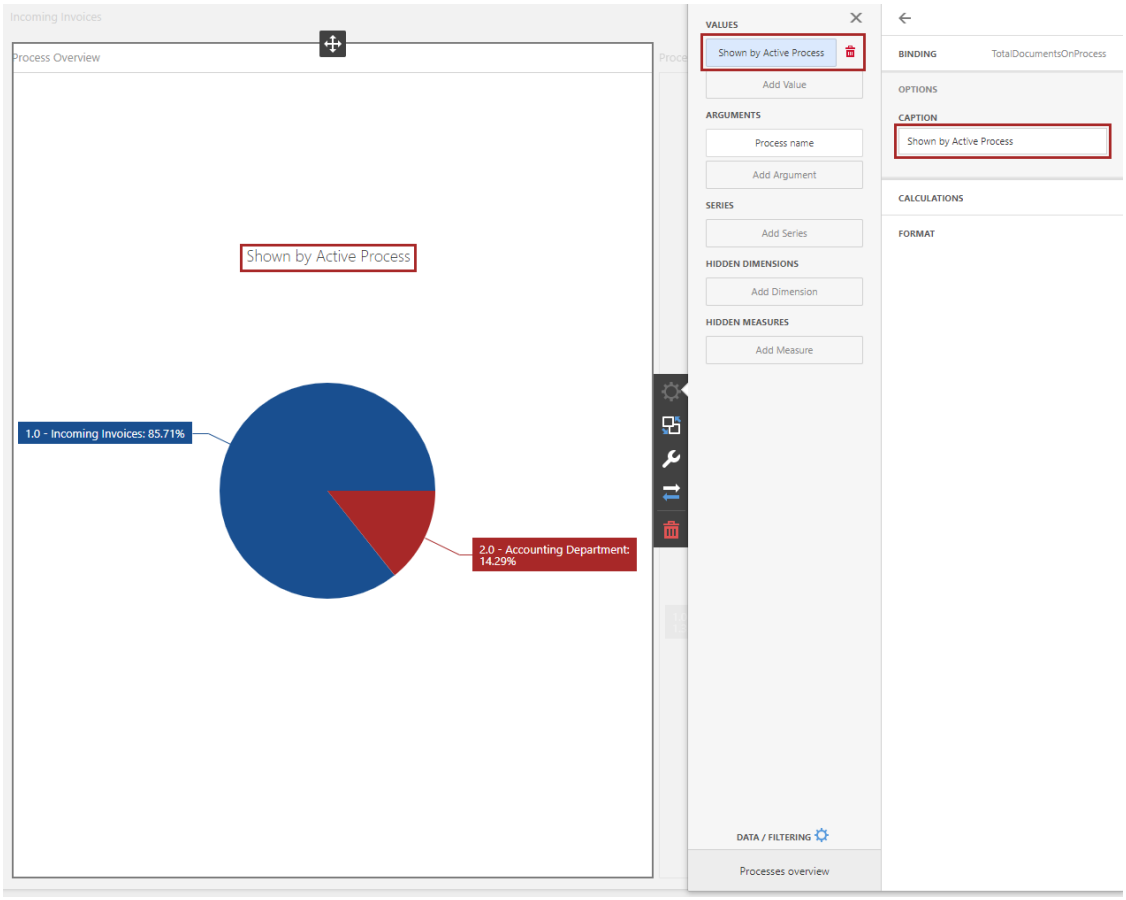
Result



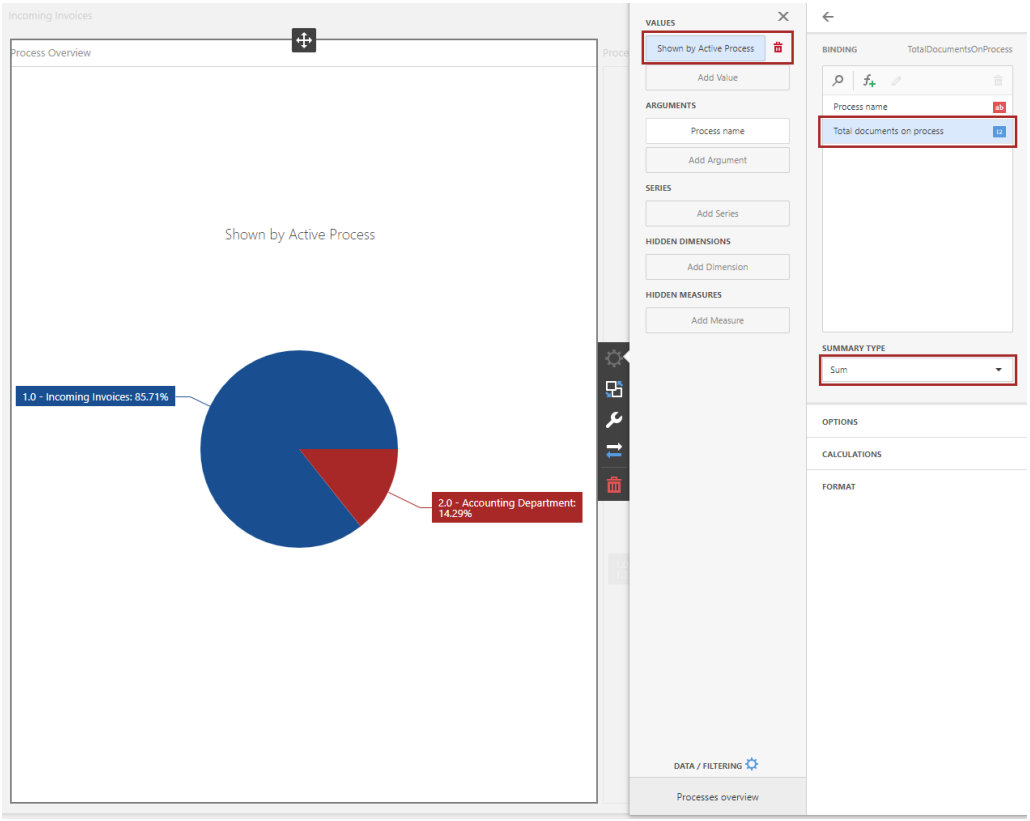
1. The diagram on the left-hand side was renamed to *Process Overview*.



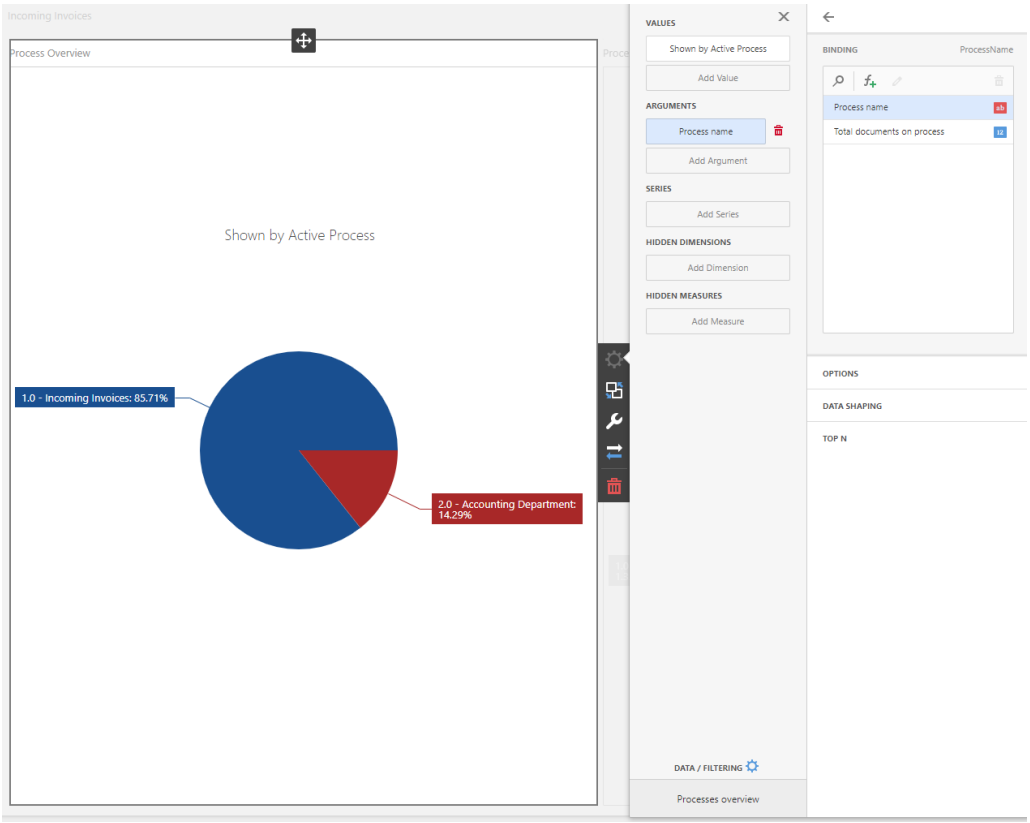
2. The *Caption* was changed from *Total documents on process* to *Shown by Active Processes*.



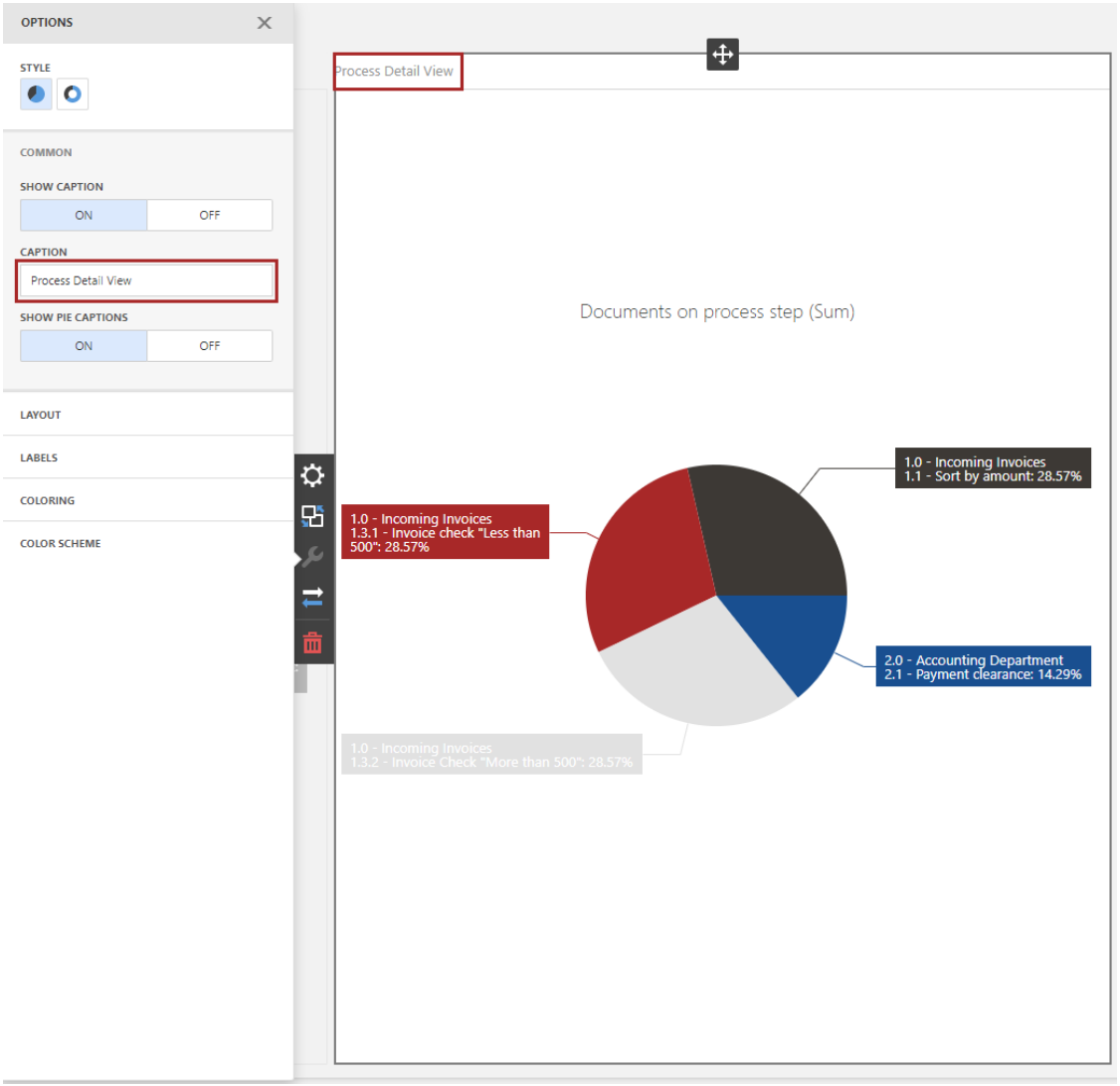
3. The following *Bindings* were made:
    a. *Values* was set to *Total documents on process*, using *Add value* and the *Summary type* was set to *Sum*.



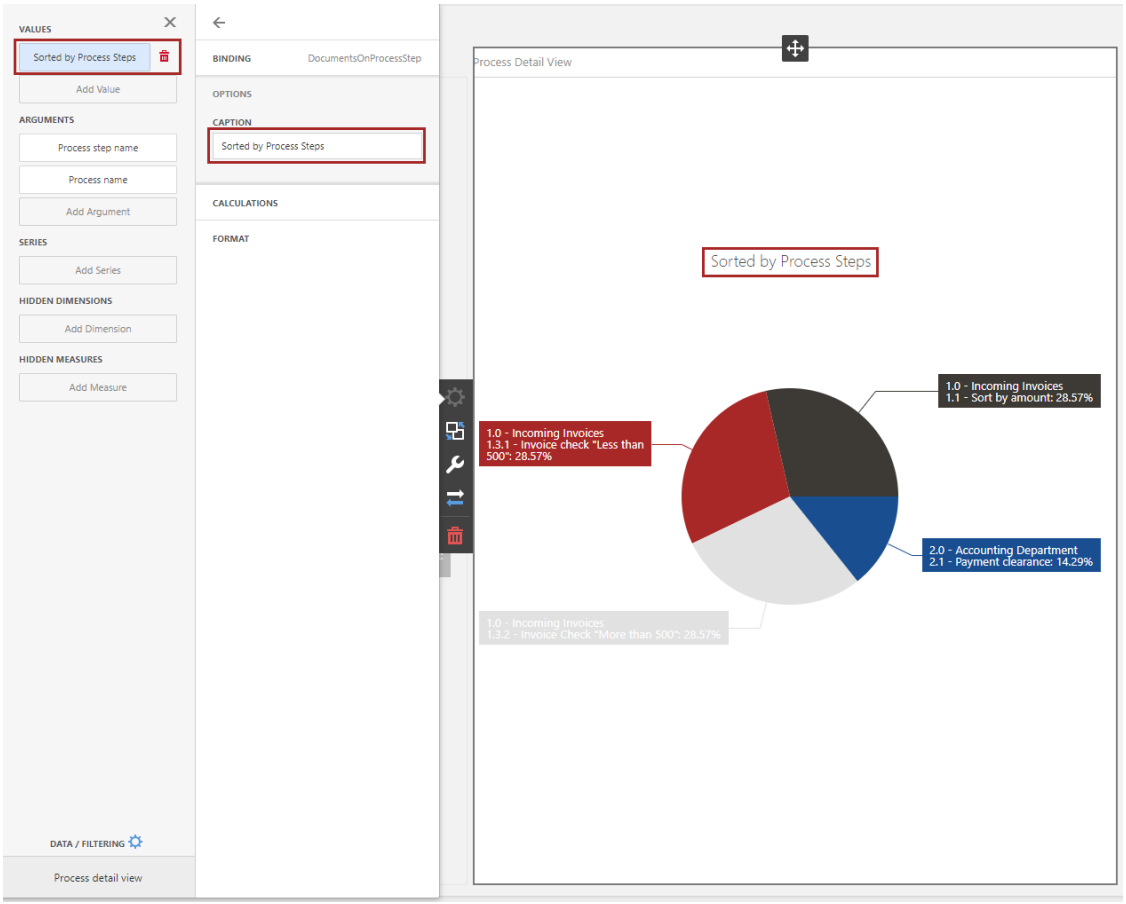
b. *Arguments* was set to *Process name*, using *Add Argument*.



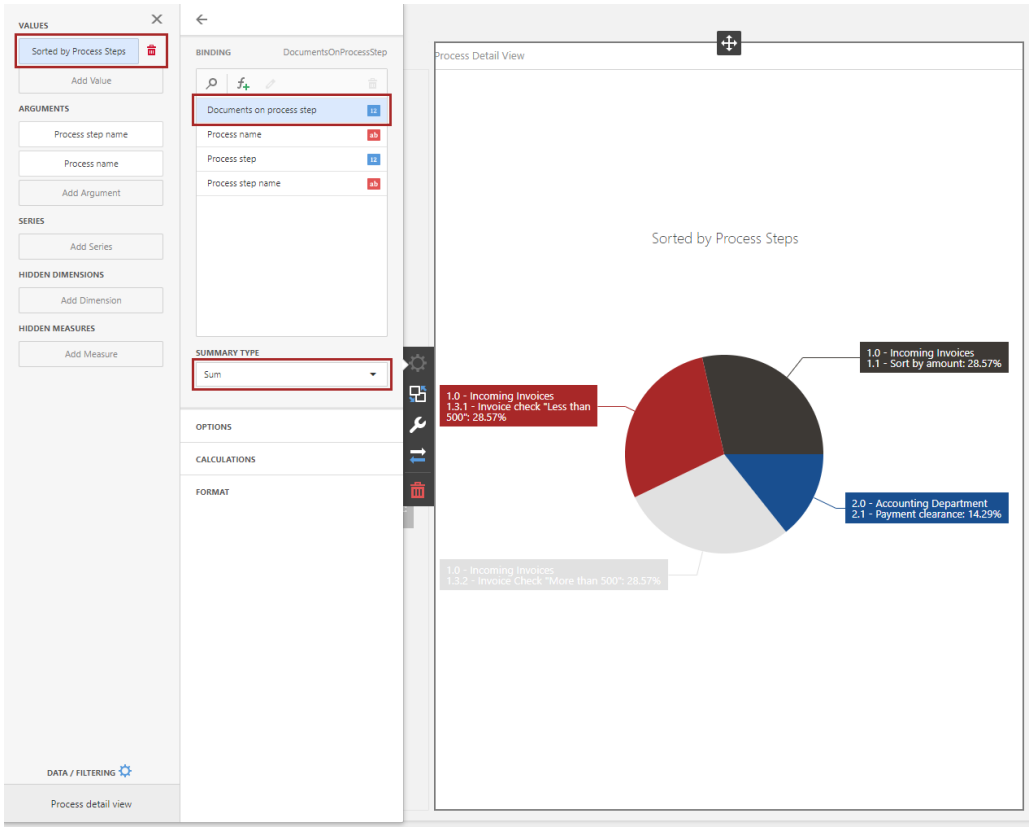
1. The diagram on the right-hand side was renamed to *Process Detail View*.



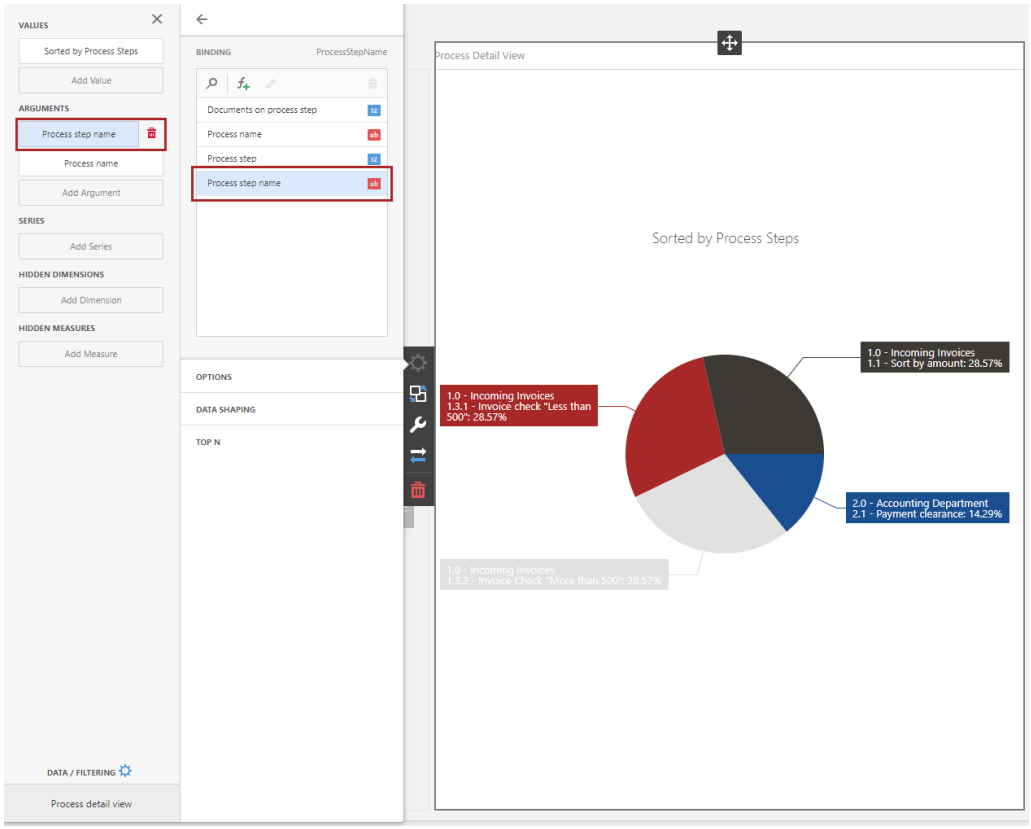
2. The *Caption* was changed from *Documents on process step* to *Sorted by Process Steps*.

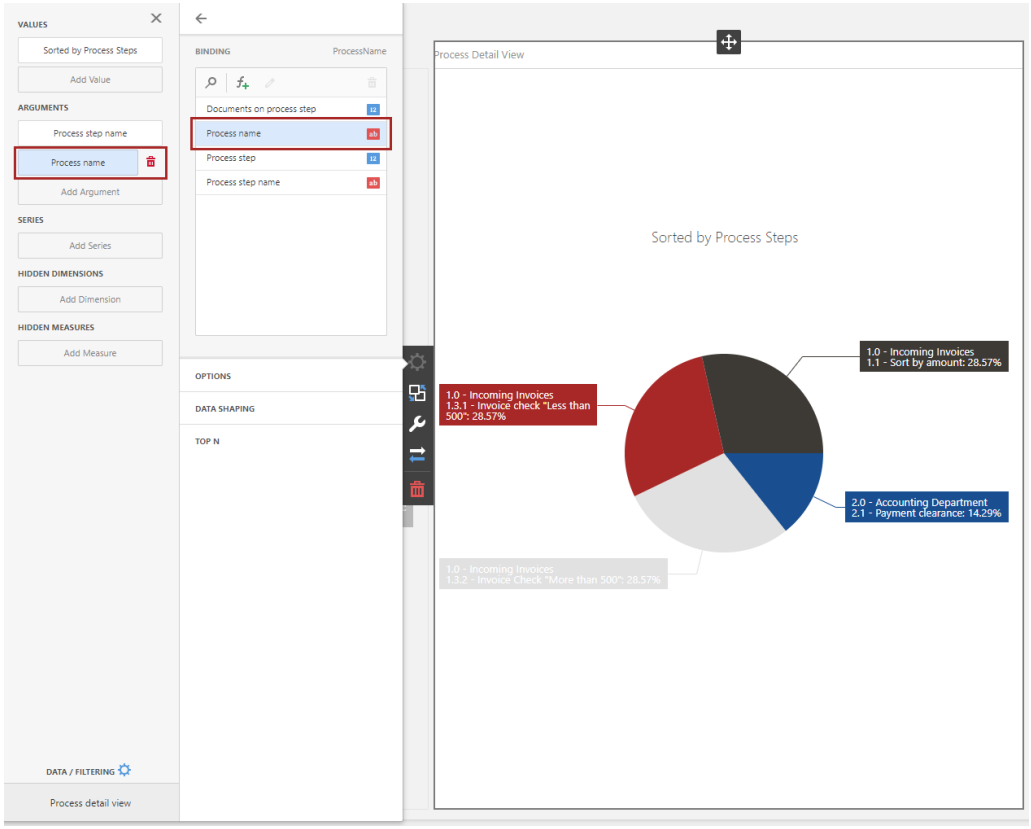


3. The following *Bindings* were made:
    a. *Values* was set to *Documents on process step*, using *Add value* and the *Summary Type* was set to *Sum*.



b. *Arguments* was set to *Process step name* and *Process name*, using *Add Argument*.



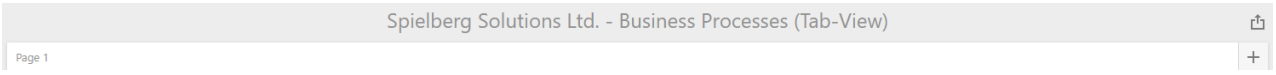


Tab container



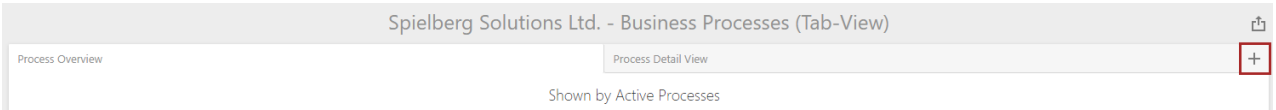
The option *Tab Container* shows one diagram per tab at a time. The tabs are automatically flicked through, according to the *Tab page switch (min)* setting in FileDirector EnterpriseManager.

The default layout of Tab container consist of a single tab, labelled Page 1.



Add a tab

If an addition diagram is needed at a later stage, it can be added by the **+** at the right hand side of the existing tabs.



The new tab will be added after the existing tabs. The default *Caption* is *Page #* and can be changed.

Add a diagram

If an addition diagram is needed at a later stage, it will be added by a simple drag&drop action.

Select a diagram from the *Common* section and drag it on the existing group. A horizontal or vertical line will appear and the additional diagram can be placed within an existing tab.

Change Order/Delete Tabs



The order of the tabs within a container can be changed quickly.

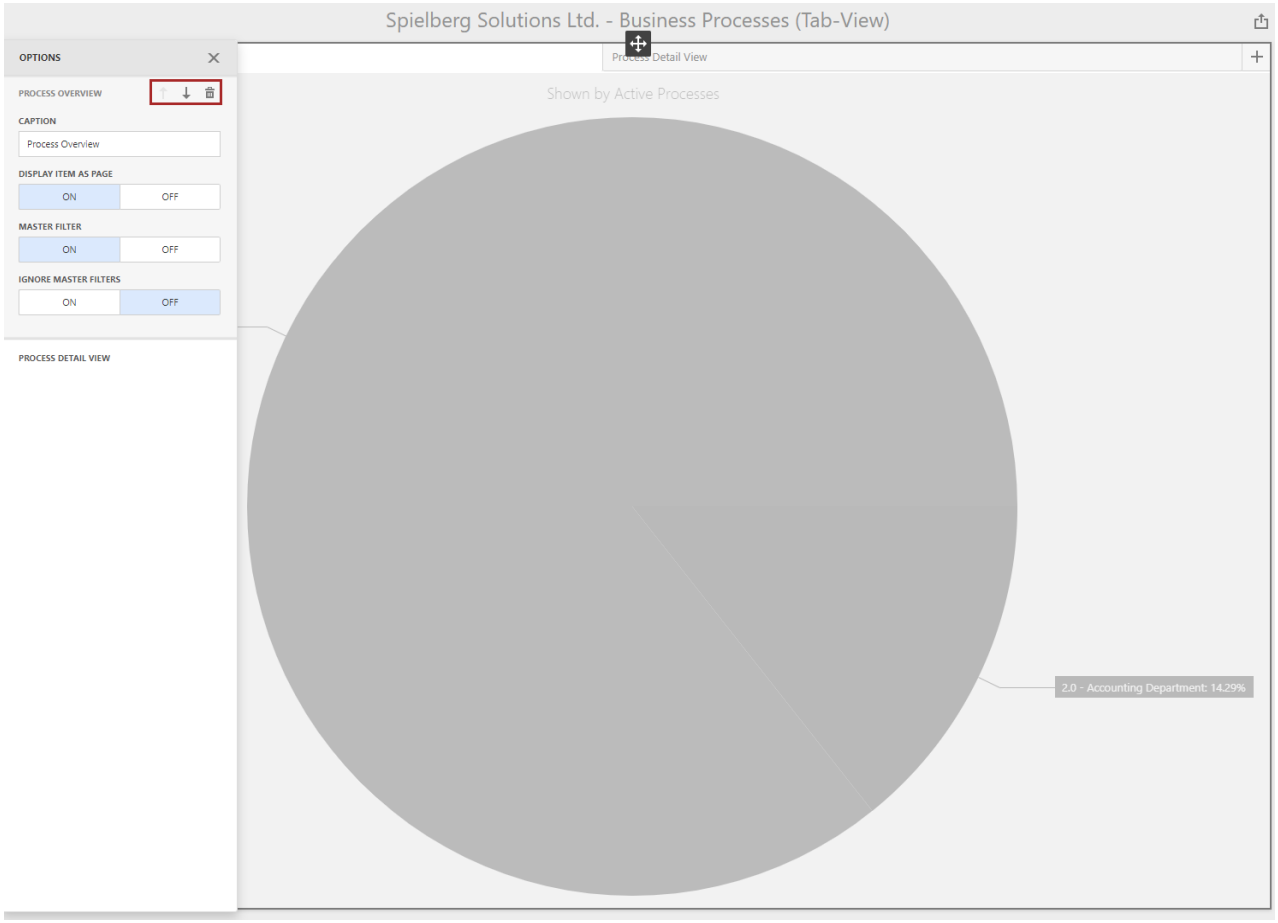
Simply open *Options* of the container and change the order by using the *Up* and *Down* icons. The icons appear when the mouse pointer is moved to this area.



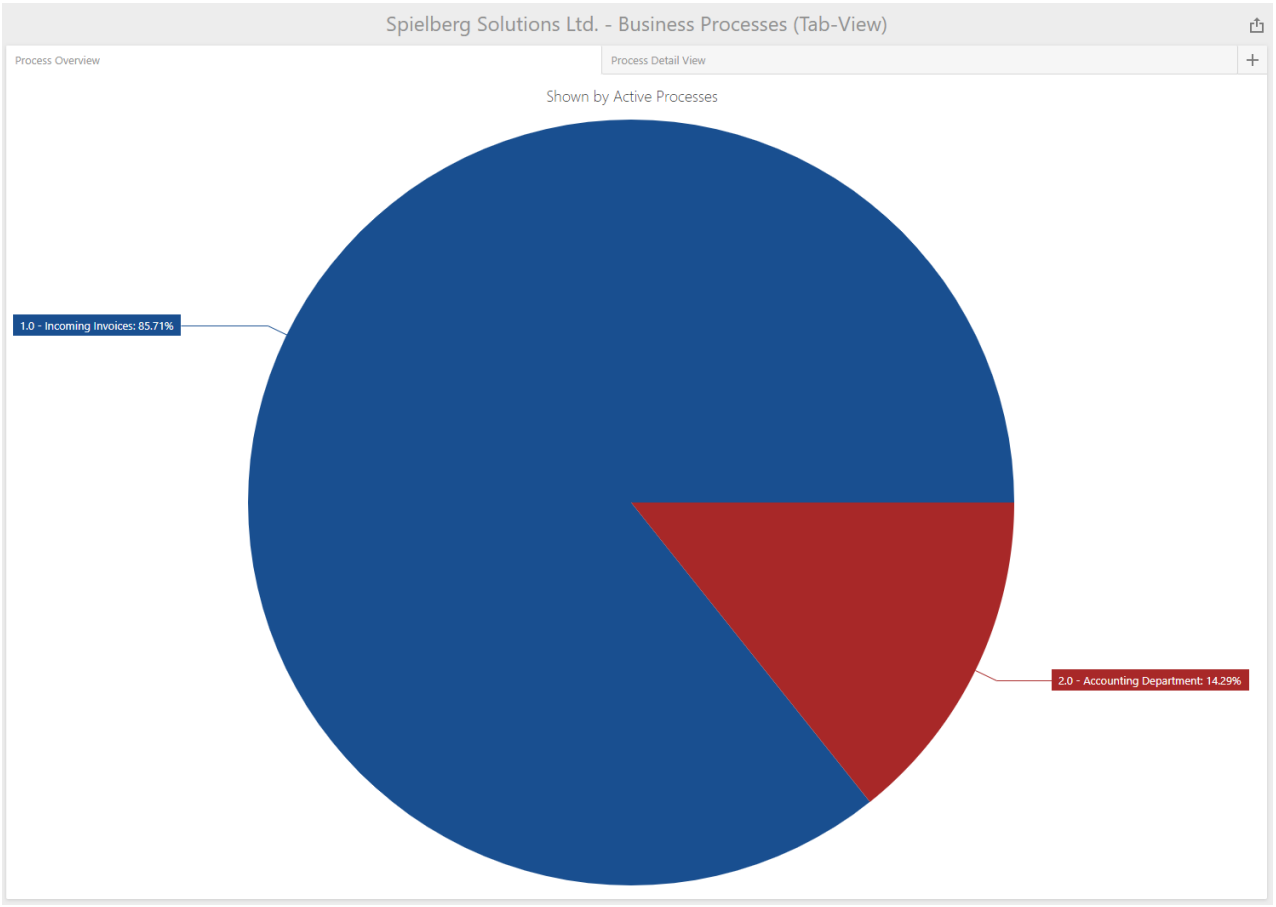
Quite similar, existing tabs can be deleted.

Simply open *Options* of the container and move the mouse pointer to this area and the Delete icon will appear.

> *Important:*
> *After clicking on Delete, the tab is being deleted without any additional warning.*

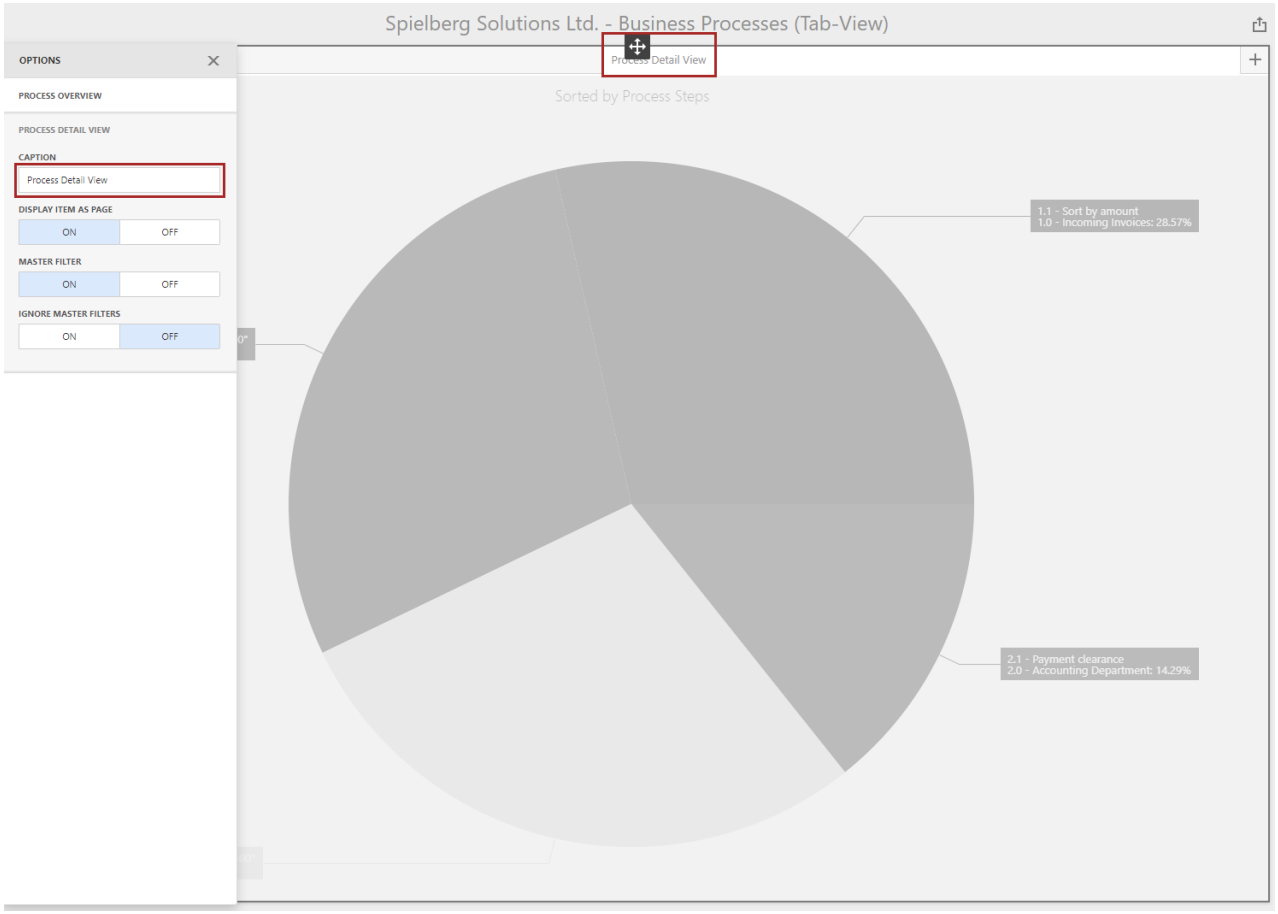


Example

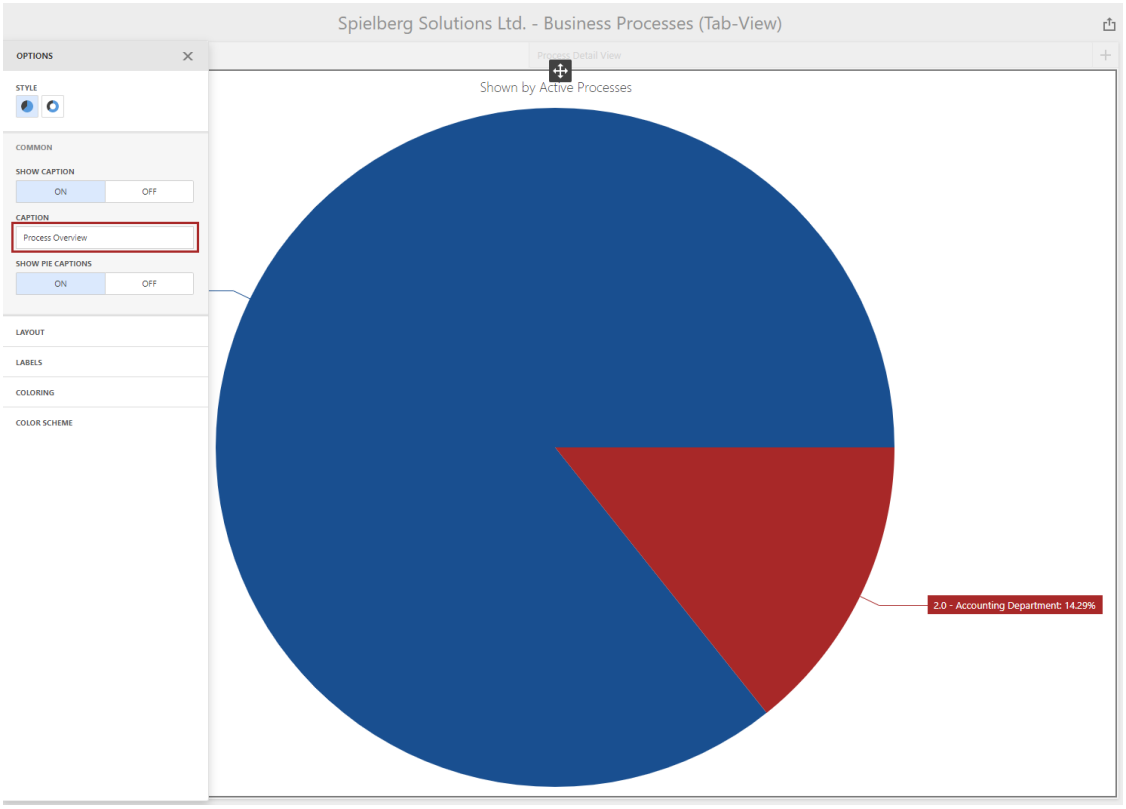


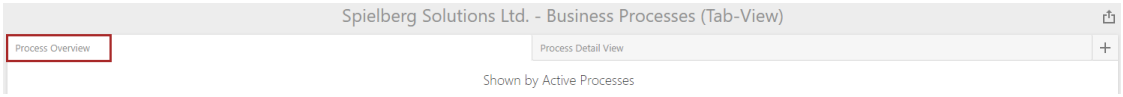
1. The selected diagram format is *Pies*.
2. Within the *Options* menu of the tab container, the pages were renamed from *Page 1* and *Page 2* to *Process overview* and *Process detail view*.

Dashboard

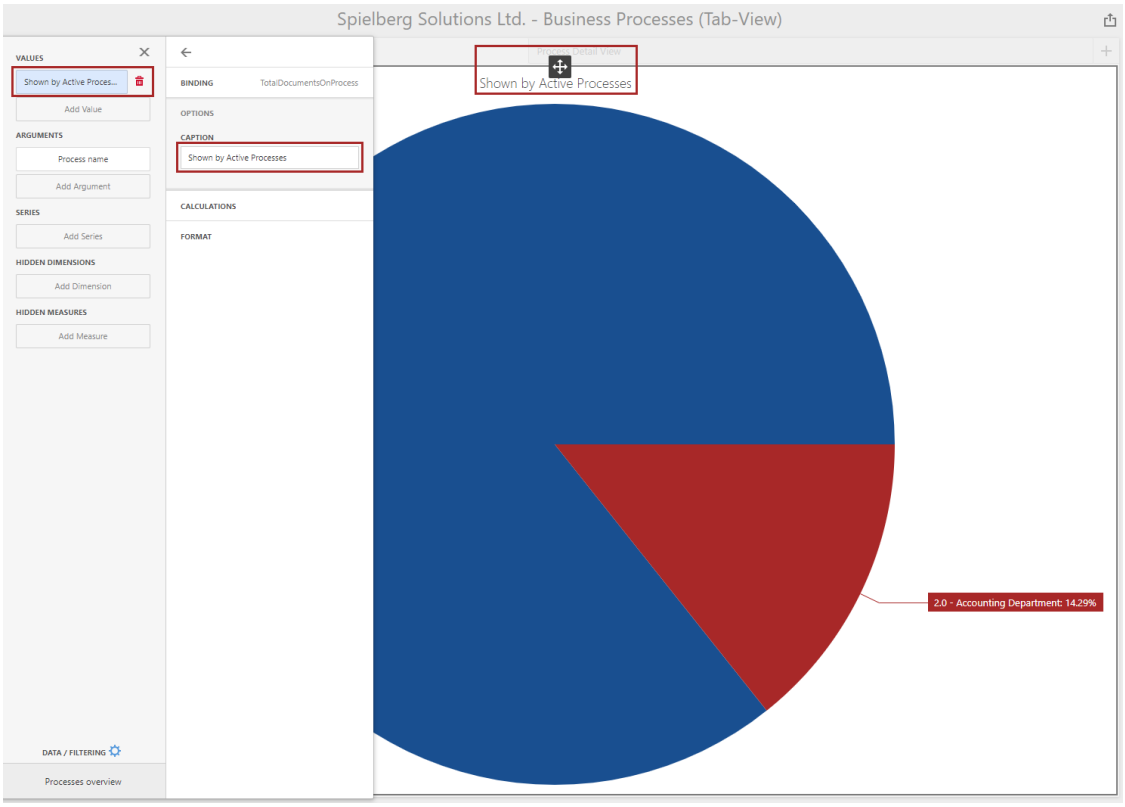


First Tab

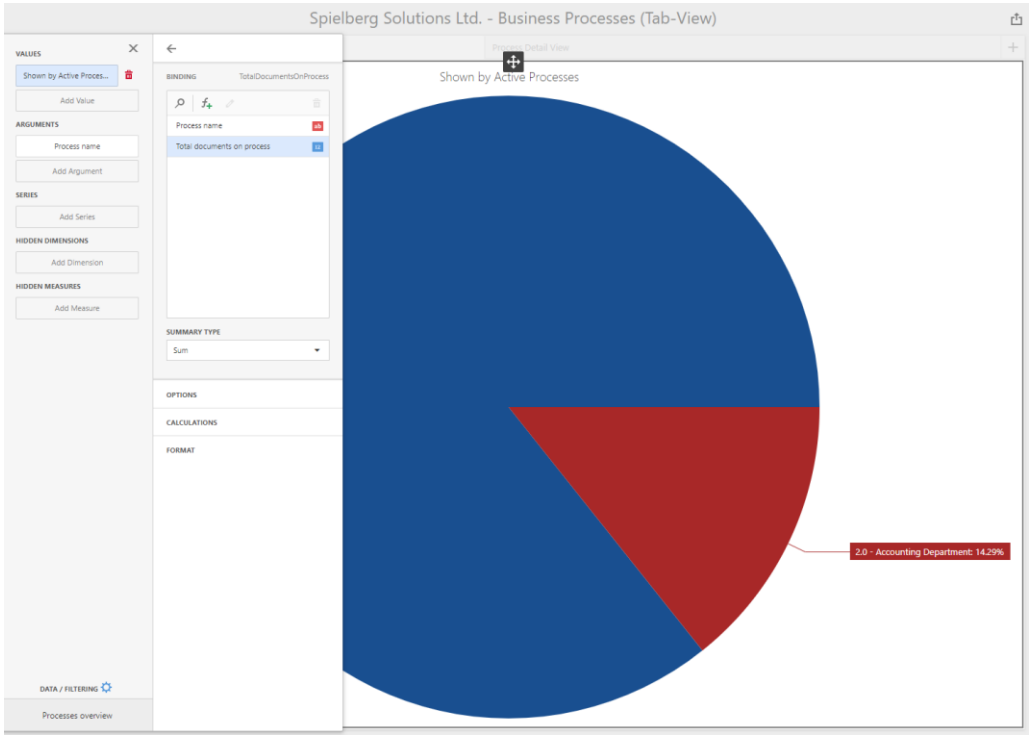




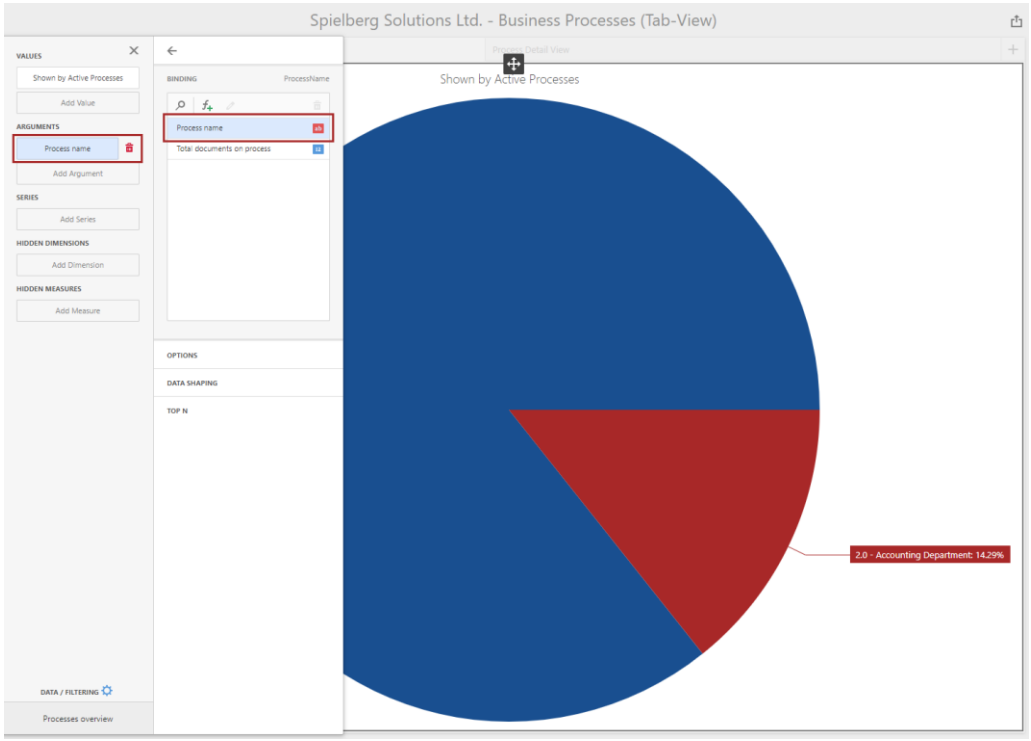
1. The *Caption* was changed from *Total documents on process* to *Shown by Active Processes*.



2. The following *Bindings* were made:
    a. *Values* was set to *Total documents on process*, using *Add value* and the *Summary type* was set to *Sum*.

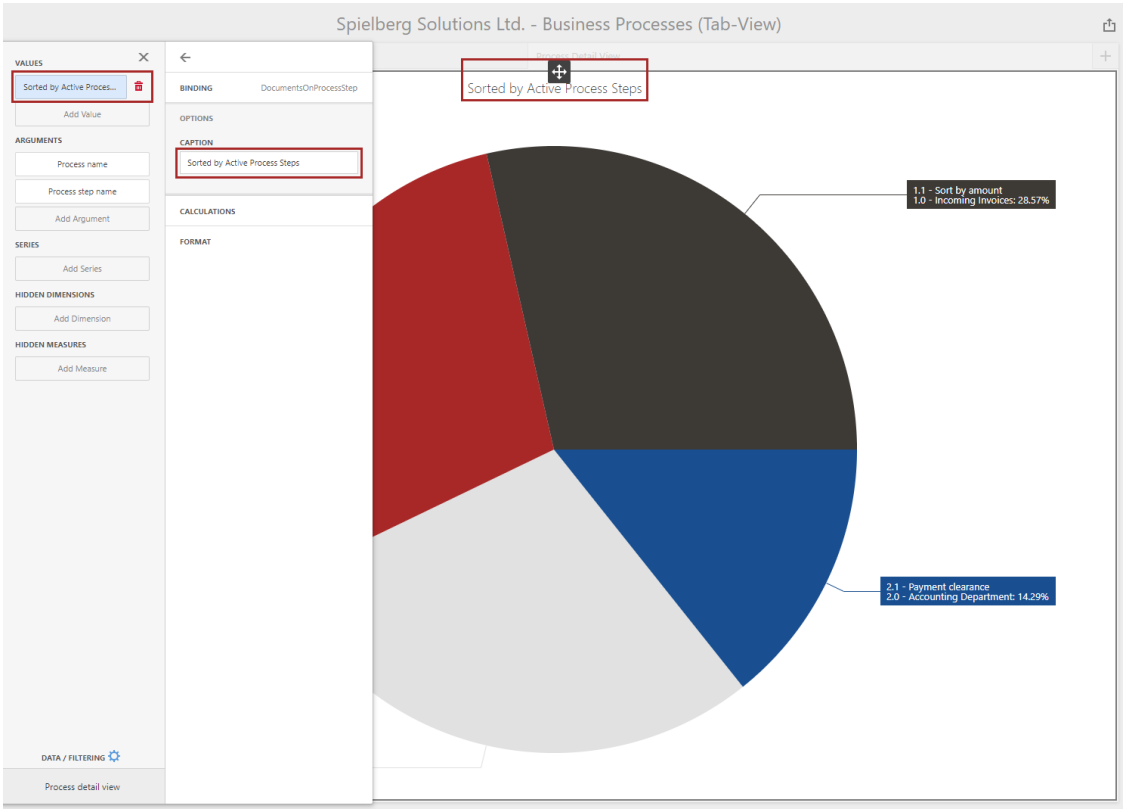


b. *Arguments* was set to *Process name*, using *Add Argument*.

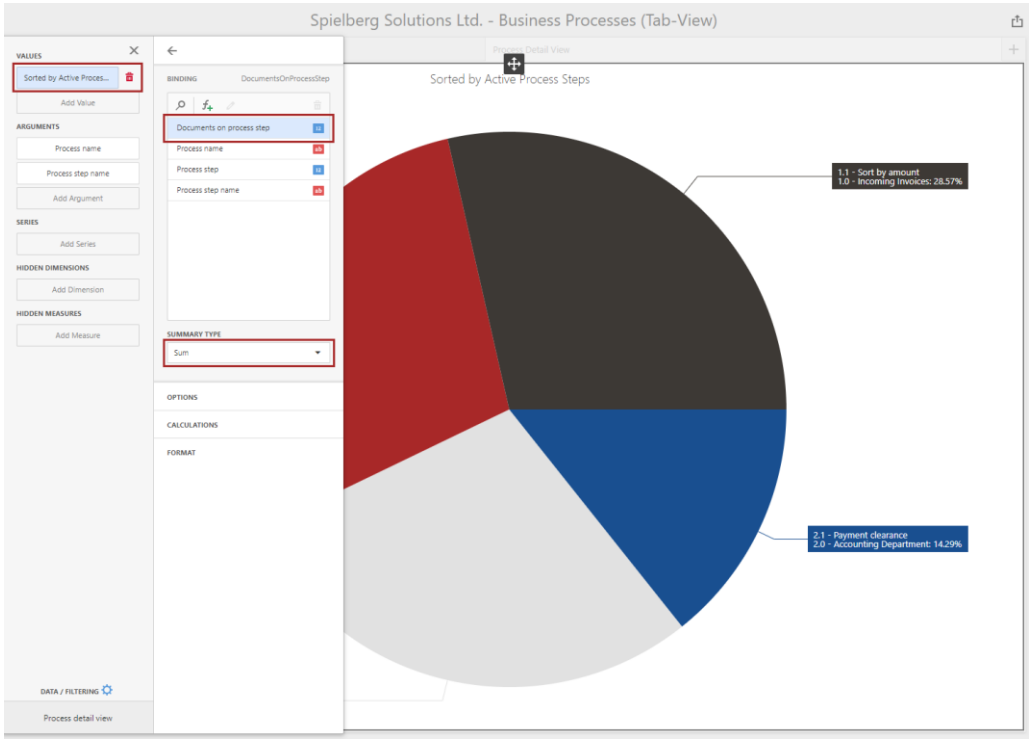


Second Tab

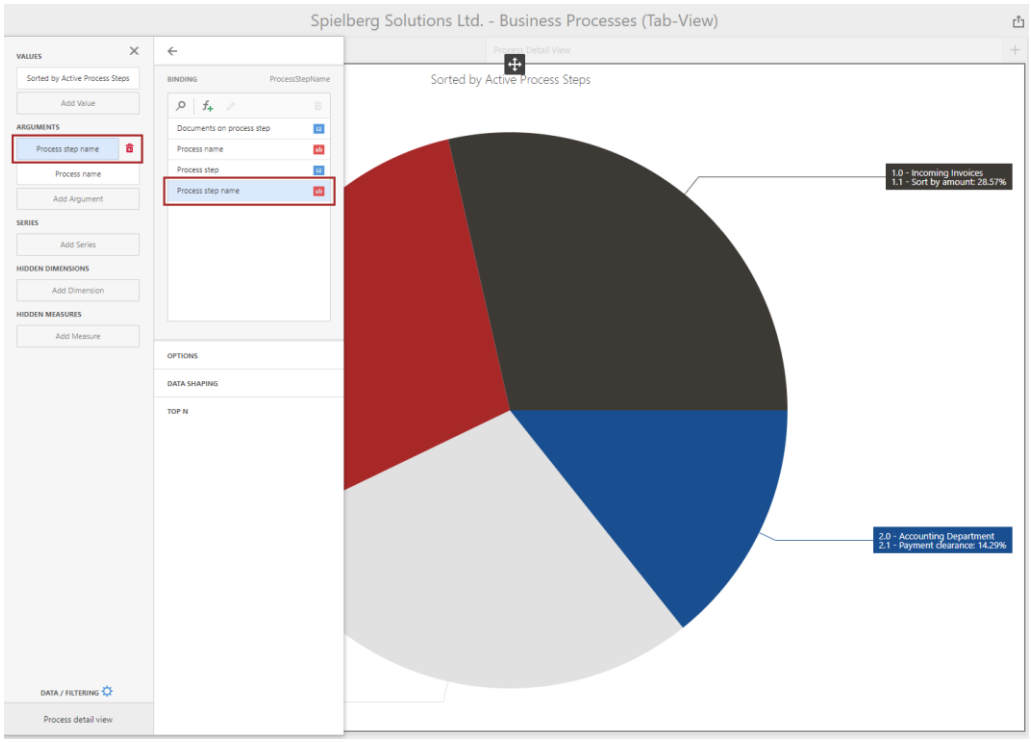
1. The *Caption* was changed from *Documents on process step* to *Sorted by Process Steps*.

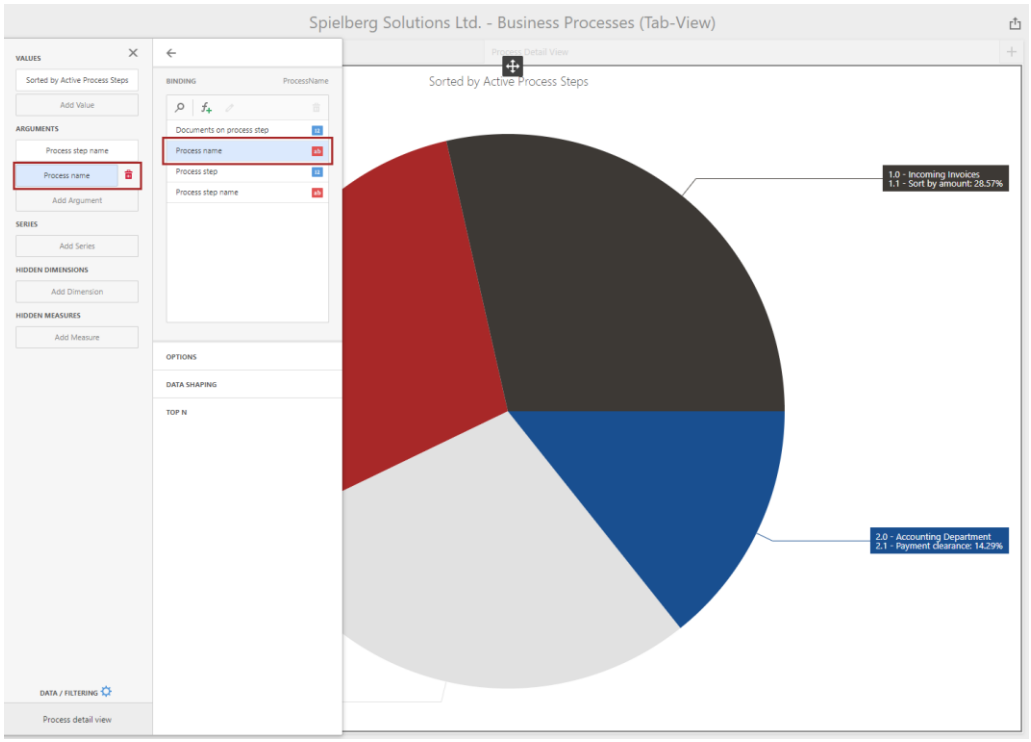


2. The following *Bindings* were made:
    a. *Values* was set to *Documents on process step*, using *Add value* and the *Summary Type* was set to *Sum*.



b. *Arguments* was set to *Process step name* and *Process name*, using *Add Argument*.





Working with Field Values

Document Index Fields is the third possible *Data Source*. This data source uses field value information of all documents within the specified document type.

The example, given below, will show the sales invoices sorted by countries.

Example

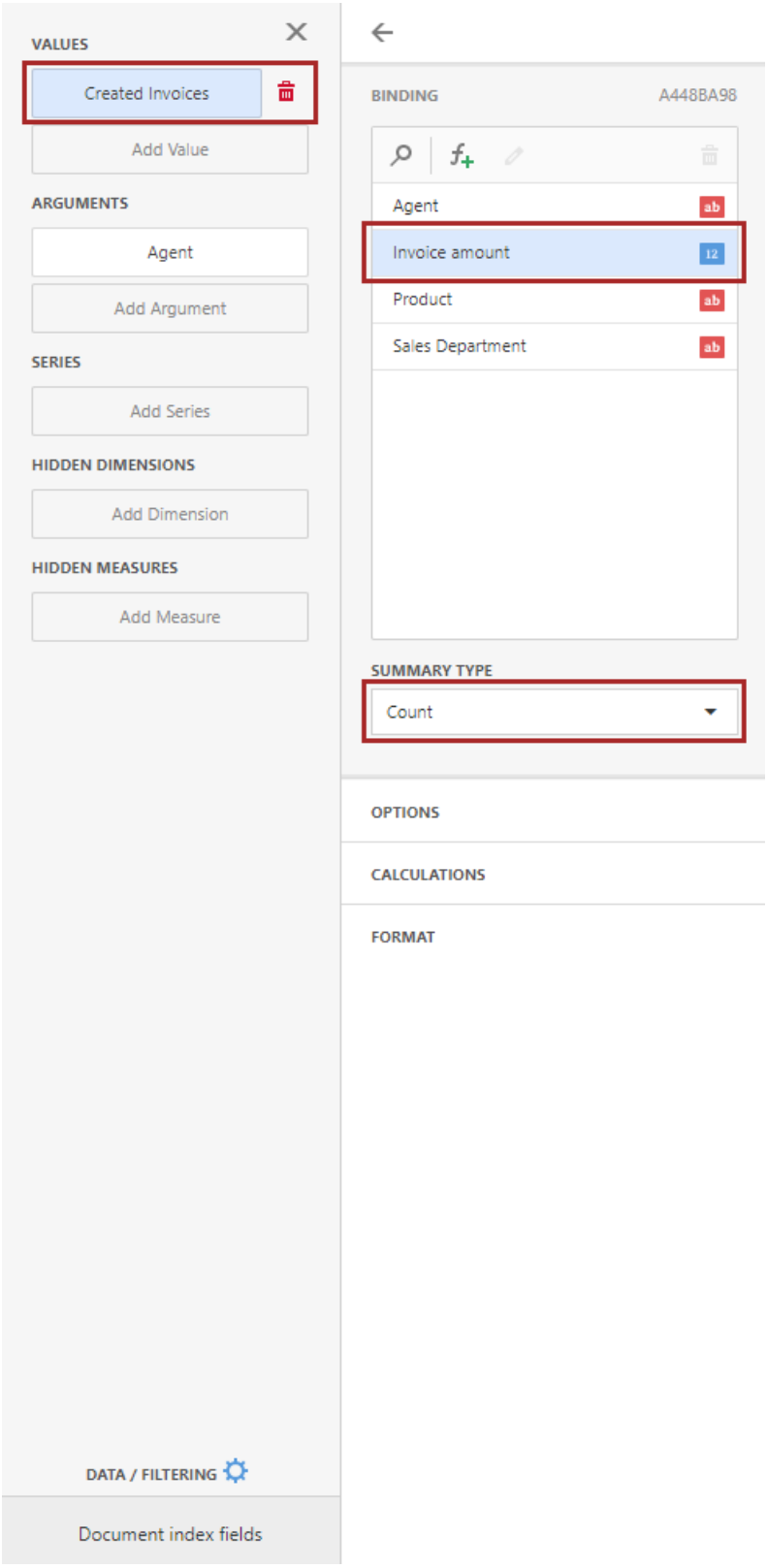
1. Go to the *Dashboard menu* on the top left side.
2. Select *New* from the unfolding menu.
    a. After selecting *New…*, a unique and descriptive name should be provided in the section *Dashboard Name*.

Note:
The name of a FileDirector Dashboard must be unique. Otherwise, the new Dashboard cannot be created.

3. The left column shows the available data sources. Select *Document index fields* from the list and confirm with Create.
4. Now, go back to the *Dashboard menu* on the top left side and select *Data source* from the unfolding menu.
    a. On the left hand side, the previously selected data source is shown in the list of *Used Data Sources*.
    b. On the right hand side, a list of all *FileDirector index fields*, mapped to any of the cabinet's document types, is shown.

Note:
This list always contain the static field Document type.

5. Now, select a diagram type, for example *Chart*.
6. Go to *Bindings* and add *Arguments* and *Values*.
7. In this example, the index field *Agent* is used for *Arguments* and *Invoice amount* is used for *Values*.
    a. The *Summary Type* for *Values* is *Count*.



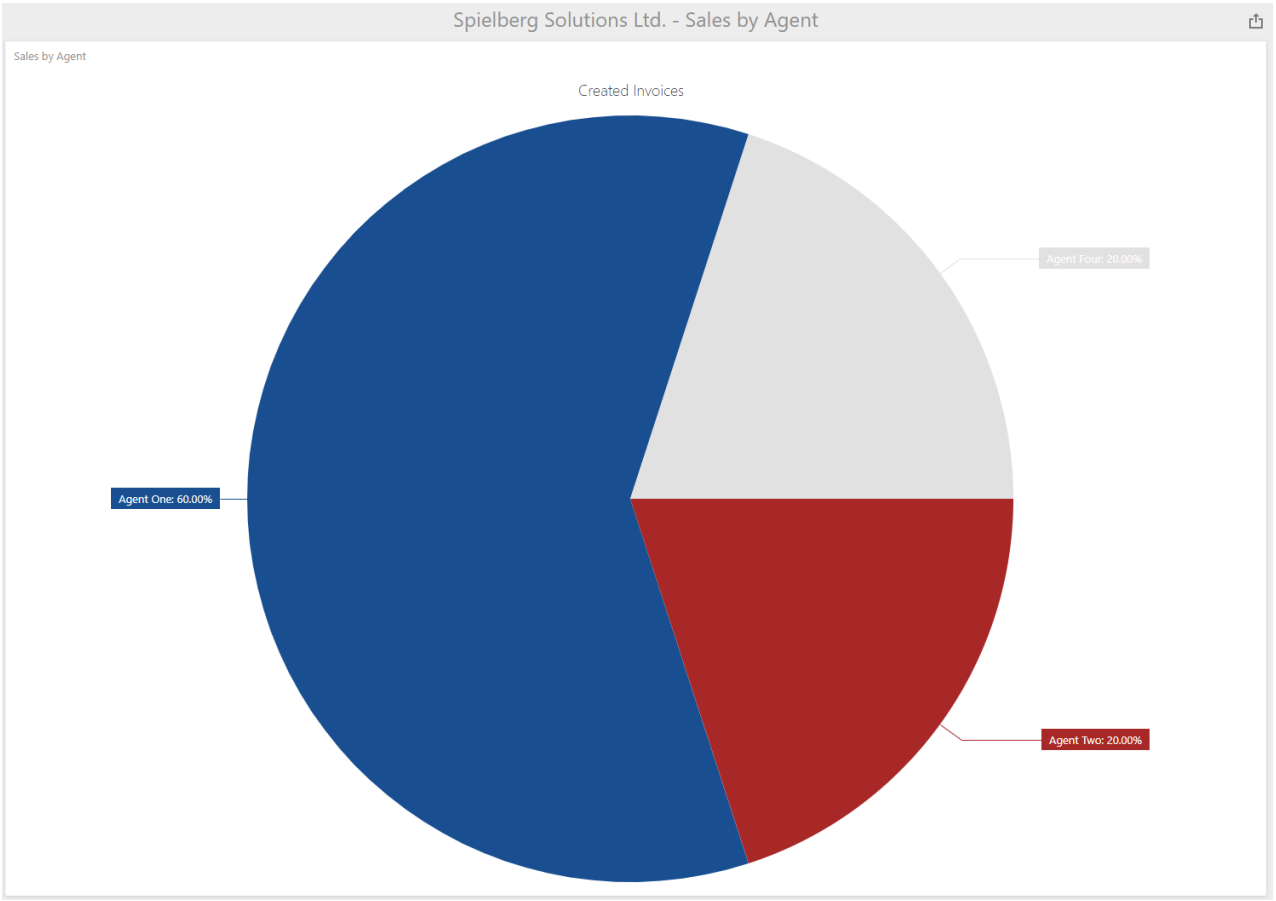
Result

The result is a pie diagram, showing the percentage distribution of sales by country, according to the documents stored in this document type:

Dashboard

Sales invoices (5 Documents)

	!	Status	Invoice number	Customer number	Document date	Order number	Customer name	Postcode	City	Invoice amount	Product	Agent	Sales Department	Pages
1			4906	12341		14321	Customer One	11111	London	1.031,71	FileDirector Enterprise	Agent One	United Kingdom	1
2			4909	12342		24321	Customer Two	22222	Lyon	1.169,62	FileDirector SBE	Agent Two	France	1
3			4910	12343		34321	Customer Three	333	Manchester	3.915,75	FileDirector SBE	Agent One	United Kingdom	1
4			4907	12344		44321	Customer Three	33333	Manchester	1.031,72	FileDirector SBE	Agent One	United Kingdom	1
5			4908	12345		54321	Customer Four	44444	Berlin	6.645,43	ScanFile	Agent Four	Germany	1



Example

1. Go to the *Dashboard menu* on the top left side.
2. Select *New* from the unfolding menu.
    a. After selecting *New…*, a unique and descriptive name should be provided in the section *Dashboard Name*.

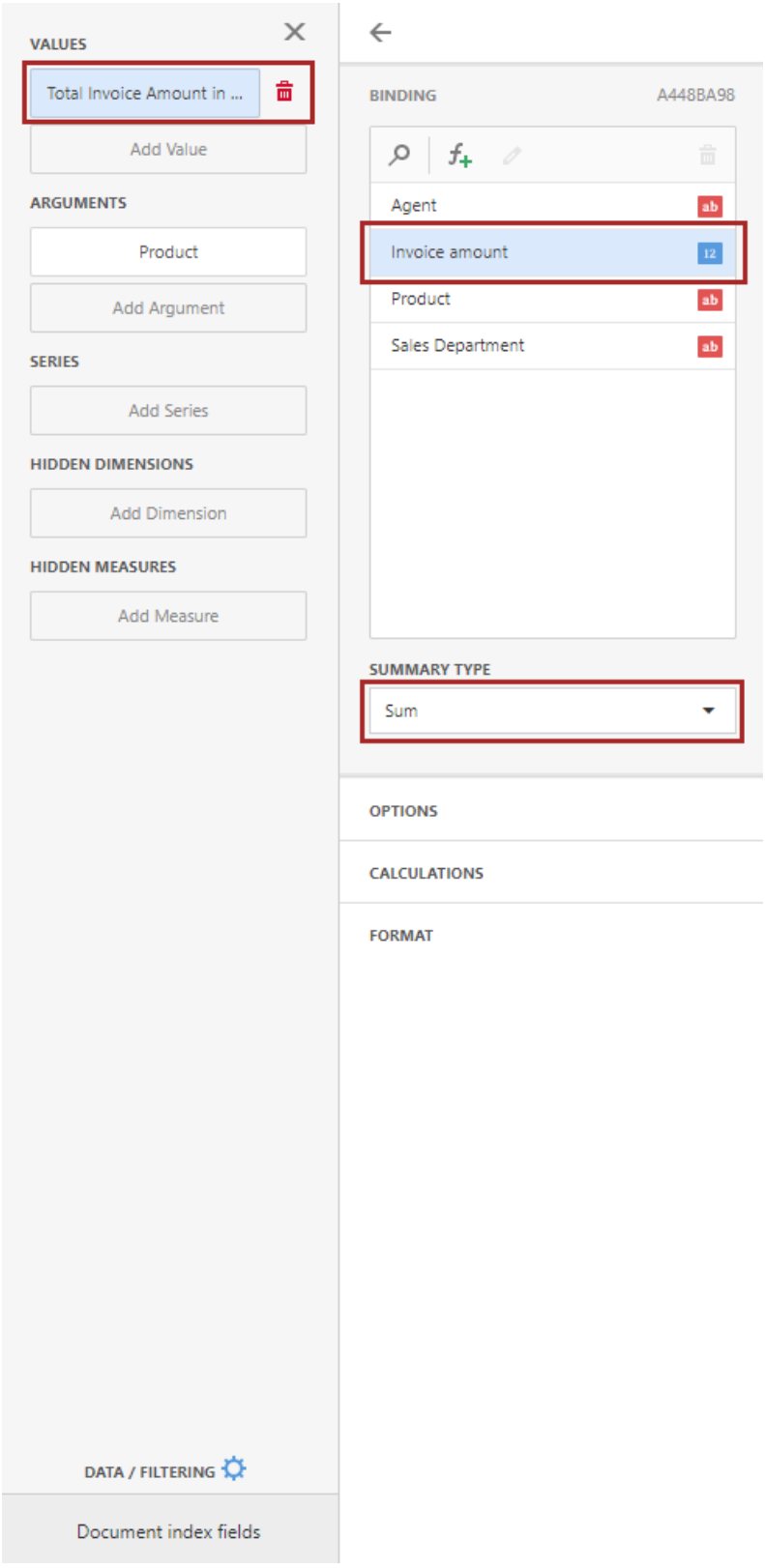
Note:
The name of a FileDirector Dashboard must be unique. Otherwise, the new Dashboard cannot be created.

3. The left column shows the available data sources. Select *Document index fields* from the list and confirm with Create.
4. Now, go back to the *Dashboard menu* on the top left side and select *Data source* from the unfolding menu.
    a. On the left hand side, the previously selected data source is shown in the list of *Used Data Sources*.

b. On the right hand side, a list of all *FileDirector index fields*, mapped to any of the cabinet's document types, is shown.

Note:
This list shows only FileDirector fields, previously selected in FileDirector EnterpriseManager.

5. Now, select a diagram type, for example *Pie*.
6. Go to *Bindings* and add *Arguments* and *Values*.
7. In this example, the index field *Product* is used for *Arguments* and the index field *Invoice amount* for *Values*.
    a. The *Summary Type* for *Values* is *Sum*.



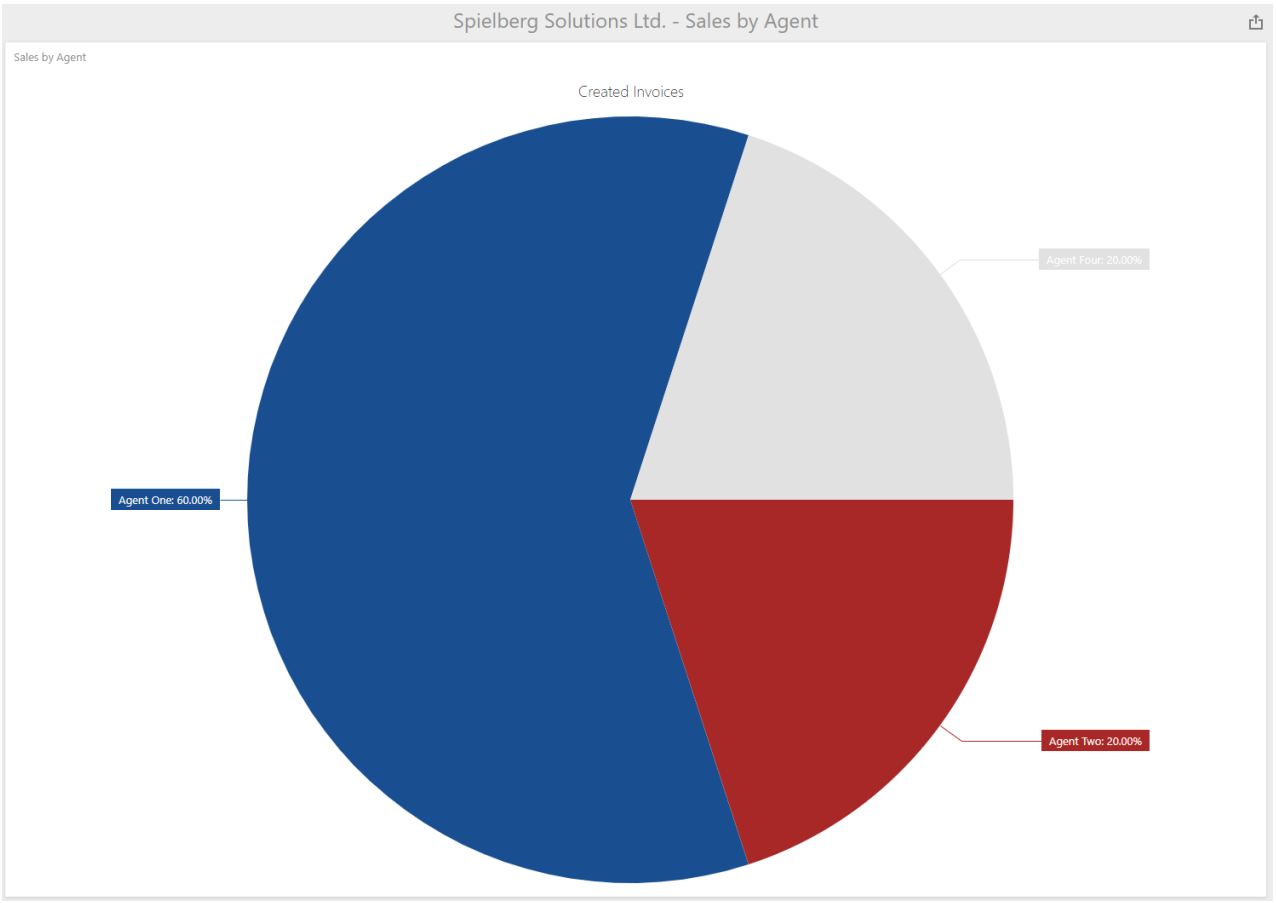
Result

The result is a pie diagram, showing the invoice amount sorted by department, according to the documents stored in this document type:

Dashboard

Sales invoices (5 Documents)

	!	Status	Invoice number	Customer number	Document date	Order number	Customer name	Postcode	City	Invoice amount	Product	Agent	Sales Department	Pages
1			4906	12341		14321	Customer One	11111	London	1.031,71	FileDirector Enterprise	Agent One	United Kingdom	1
2			4909	12342		24321	Customer Two	22222	Lyon	1.169,62	FileDirector SBE	Agent Two	France	1
3			4910	12343		34321	Customer Three	333	Manchester	3.915,75	FileDirector SBE	Agent One	United Kingdom	1
4			4907	12344		44321	Customer Three	33333	Manchester	1.031,72	FileDirector SBE	Agent One	United Kingdom	1
5			4908	12345		54321	Customer Four	44444	Berlin	6.645,43	ScanFile	Agent Four	Germany	1



Export

Overview



The content of a FileDirector Dashboard can be exported into different file formats.

Export option	File format
PDF	*.pdf
Image	*.png, *.gif, *.jpg
Excel	*.xlsx, *.xls

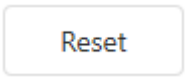
Export to PDF

Options

Option	Description
File Name	The default file name is *New Dashboard* and can be altered. The file name should be unique.
Page Layout	One of the following options can be selected: *Portrait* *Landscape* *Auto* The default value is *Auto*.

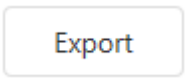
Option	Description
Size	One of the following sizes can be selected: *Letter* *Legal* *Executive* *A5* *A4* *A3*
Show Title	In default, the check box is ticked and the dashboard's title is shown and exported to the pdf file.
Scale Mode	
Include	The corresponding *Filters* and *Parameters* can be selected to be also exported to the pdf document.
Position	This option is connected to the option above. The drop-down-menu provides two options where *Filters*/*Parameters* should be placed: *Below* *Separate Page*

Reset



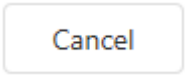
The button Reset sets all option back to default.

Export



Creates the export file with the options set above.

Cancel



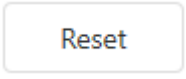
Aborts the export and closes the export pop-up window.

Export to Image

Options

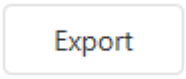
Option	Description
File Name	The default file name is *New Dashboard* and can be altered. The file name should be unique.
Show Title	In default, the check box is ticked and the dashboard's title is shown and exported to the pdf file.
Titel	The default title is *New Dashboard* and can be altered.
Image Format	One of the following formats can be selected: *PNG* *GIF* *JPG*
Resolution (dpi)	The default value is *96* and can be altered.
Include	The corresponding *Filters* and *Parameters* can be selected to be also exported to the pdf document.

Reset



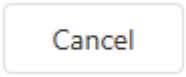
The button Reset sets all option back to default.

Export



Creates the export file with the options set above.

Cancel



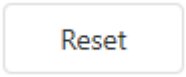
Aborts the export and closes the export pop-up window.

Export to Excel

Options

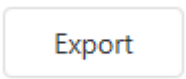
Option	Description
File Name	The default file name is *New Dashboard* and can be altered. The file name should be unique.
Show Title	In default, the check box is ticked and the dashboard's title is shown and exported to the pdf file.
Titel	The default title is *New Dashboard* and can be altered.
Excel Format	One of the following formats can be selected: *XLSX*
Resolution (dpi)	The default value is *96* and can be altered.
Include	The corresponding *Filters* and *Parameters* can be selected to be also exported to the pdf document.

Reset



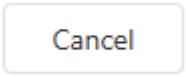
The button Reset sets all option back to default.

Export



Creates the export file with the options set above.

Cancel



Aborts the export and closes the export pop-up window.