Deltek

Deltek WorkBook Intelligence

Dashboard Designers Guide

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Contents

Overview

Additional Documentation

You can perform a Deltek Support Center search for additional documents at the following link:

https://deltek.custhelp.com/app/answers/detail/a_id/79935

For information about the WorkBook API, you can access the *Deltek WorkBook API Guide* at the following link:

https://workbookapi.deltek.com/?version=latest

Supported Products

Compatibility Matrix

Information about platform requirements is maintained in the Deltek Product Support Compatibility Matrix, located on the Deltek Support Center. In the Matrix, search on “WorkBook” to navigate quickly to the information that you need.

Internal Link

https://home.deltek.com/sites/products/Documents/DeltekProductSupportCompatibilityMatrix.pdf

External Link – Deltek Support Center

Deltek Product Support Compatibility Matrix

Introduction

What is WorkBook Intelligence?

WorkBook Intelligence is an insights and analysis add-on to the WorkBook web-based application. It is delivered as a number of dashboards within the WorkBook Dashboards module, and it uses the existing iFrames functionality.

The dashboards that WorkBook delivers as standard cover a broad range of WorkBook functionality, including the Jobs module, Finance module, CRM module, and a dashboard that covers resource management, capacity, and time entry.

Each dashboard contains a number of individual widgets. Widgets can be numeric indicators, graphs and charts, or text elements that are designed to deliver data insights in plain language. Further, each dashboard provides a range of filters, which allows you to filter information so that insights and analysis can be either broad or focused, based on the range of filters applied.

Dashboards obtain data to display as visualizations by querying data models that are called cubes. WorkBook Intelligence delivers a set of cubes from which the delivered dashboards obtain data. Users who have Dashboard User licenses do not have access to see which data items are provided by the delivered cubes. Only users who have Designer licenses have access to this information.

Your Role as a Designer

As a Designer, you can create, design, edit, duplicate, and share dashboards. Dashboards are built on data models. As a designer you can create and edit dashboards, but you cannot create or edit data models. Please contact Deltek Global Services or your Customer Support representative for support regarding data models.

This document provides information about how to create and edit dashboards.

Create a Dashboard

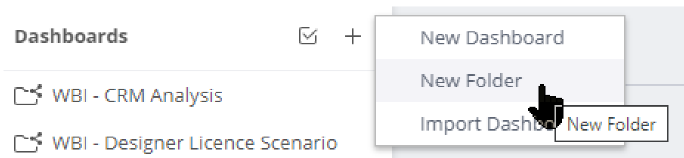
You can create a dashboard on the Analytics tab of the WorkBook Intelligence Design page.

Create a Folder

It is good practice to create a folder to hold all related dashboards and better organize your work. You can create folders first, and then create dashboards within folders. Alternatively, you can create dashboards, create folders, and then drag-and-drop dashboards into folders.

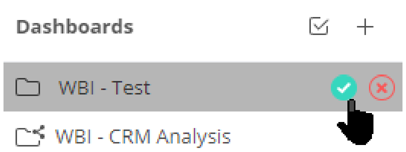
To create a folder:

1. Navigate to the **Analytics** tab.
2. Click **+** in the **Dashboards** list header, then select **New Folder** on the shortcut menu.



   A new folder appears in the Dashboards list.

3. Enter a meaningful name for the folder, then click ✓ to confirm.



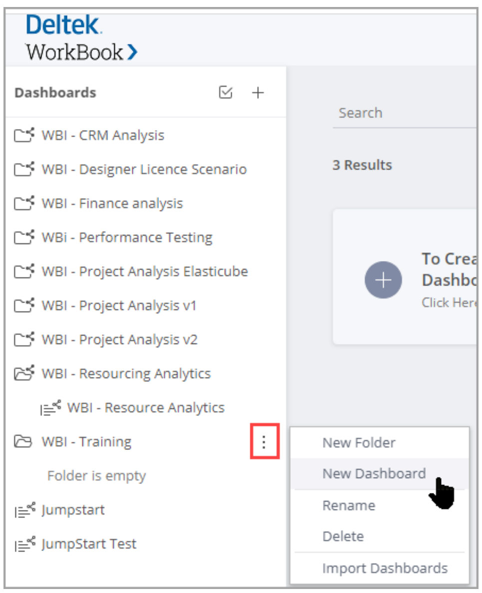
   The new folder appears in the Dashboards list according to its sequence in alphabetical order.

Create a Dashboard

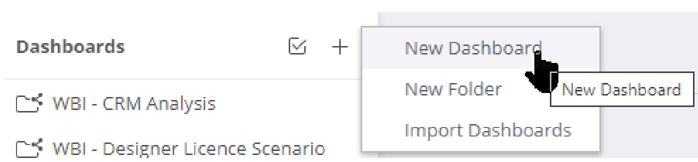
You can start to create a dashboard in several ways. After you select the method that you want to use, the remaining steps in the process are the same.

To create a dashboard:

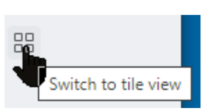
1. Navigate to the **Analytics** page.
2. Use **one** of the following methods:
   - **To create the dashboard inside a folder:**
     a. In the **Dashboards** list, locate the folder and click ⋮ **Options** to the right of its name, then select **New Dashboard** on the shortcut menu.



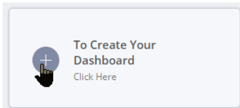
   - **To create the dashboard outside a folder, using the Dashboards list header**:
     a. In the **Dashboards list header** click **+**, then select **New Dashboard** on the shortcut menu.



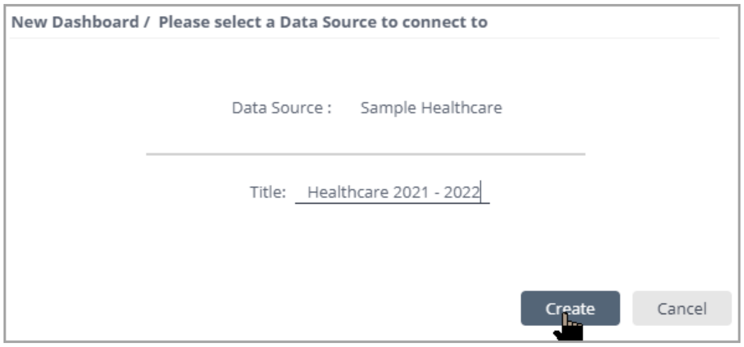
   - **To create the dashboard outside a folder, using the To Create Your Dashboard tile:**
     a. Ensure that the Analytics page is in tile view, using the **Tile View/List View toggle menu** in the upper-right corner of the page.



b. Click the **To Create Your Dashboard** tile.



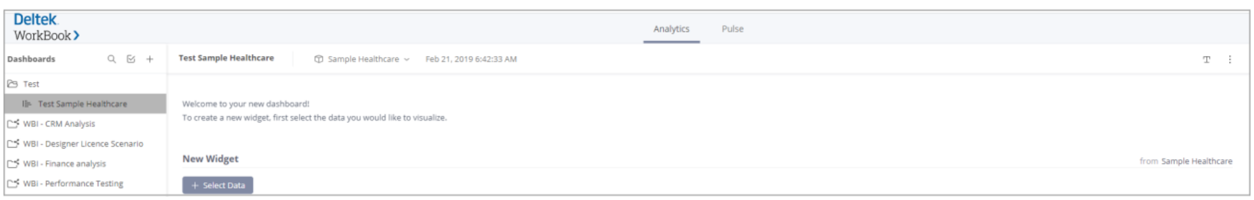
The New Dashboard / Please Select a Data Source to Connect to dialog box is displayed. The following figure shows an example.



3. On this dialog box, click **Data Source**, then select the data source that you want to use from the drop-down list. The Data Source is the data model that you intend to use for your dashboard.

   A suggested dashboard title appears in the **Title** field below the Data Source field. You can replace this title with a title that you prefer.

4. Click **Create**. A Welcome to your New Dashboard page is displayed.



   The dashboard is created and is connected to the data source that you selected. The dashboard is added to the Dashboards list on the Analytics page.

   Tip: Best practice is to first apply a title to your new dashboard.

5. Click T in the upper-right corner to add a title widget to your dashboard.

   A blank text block opens where you can type title text. You can format this text using the text formatting tools that appear in the upper-left of the dashboard window.

6. Type a title for the dashboard in the text box. Highlight the text and apply any formatting that you want to use.

   The text that you enter here appears at the top of the dashboard and in the Dashboards list.

   With the title added, you can now continue to add additional widgets or filters to your dashboard.

   - See Add a Widget to a Dashboard for instructions for adding widgets.
   - See Add Columns to a Dashboard for instructions for using columns.
   - See Use Filters for instructions for adding filters.
   - See Other Dashboard Tasks for information about additional things that you can do with dashboards.

7. When the dashboard is ready for use you can share or publish it.

Dashboard Controls

When a dashboard is in Design mode, the following header ribbon is displayed.

Tip: You can only see this header ribbon when a dashboard has at least one widget.

This ribbon provides:

- On the left side:
  - Dashboard name – The name of the current dashboard
  - Data source – The data model that the dashboard is connected to
- On the right side:
  - **+ Widget** button – To add a new widget to your dashboard
  - icon – To add a new text widget to your dashboard
  - Color Palette icon – To change the default color pattern of the dashboard
  - PDF icon – To configure default PDF settings for the dashboard
  - Share icon – To share or publish your dashboard for others to view
  - View mode icon – To toggle the dashboard between Edit mode and View mode
  - Options icon – To access additional options and settings for the open dashboard

When a dashboard is in View mode the **+ Widget** button and the and icons are not displayed because you cannot use them.

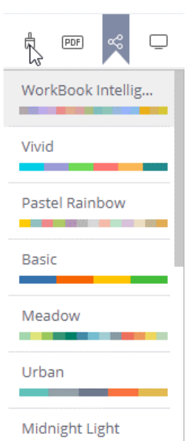
Change a Dashboard's Color Palette

To change a dashboard's color palette:

1. Navigate to the dashboard whose color palette you want to change.

   Ensure that the dashboard is in Edit mode.

2. Click at the right side of the dashboard ribbon. A list of available color palettes is displayed.



3. Scroll through the color palettes and select the one that you want to use. That color palette is applied to your dashboard. The default color palette for all WorkBook Intelligence standard dashboards is **WorkBook Intelligence**. Select this palette to align your custom dashboard's color to that of the standard dashboards.

> **Tip:** The color palette can also apply changes to the coloring of conditional formatting that you might have applied to widgets. Best practice is to review all widgets in the dashboard after you change the color palette to ensure that any specific color edits that you made are retained as required.

Create a PDF Report of the Dashboard

You can create a hard copy of the dashboard as a PDF and configure some elements of the page layout of such a PDF export.

To export a dashboard to PDF:

➢ Click the PDF icon to access the **PDF Report Settings** page.

On the PDF Report Settings page you can configure the following settings:

- You can configure the final layout of the dashboard in PDF by toggling between Edit and View mode.
  - Edit mode allows you to set the size of widgets by selecting and dragging the borders of each widget. These borders are only displayed when Edit mode is on.
  - View mode shows a preview of how the dashboard will look in the PDF; it cannot be edited.
- In both Edit and View modes, you can customize the dashboard by selecting any of the following options from the left-hand menu:
  - Paper Size – The size of the email report in the PDF.
  - Orientation – Set the PDF to either landscape or portrait.
  - Header – In the left-hand menu, select which information you want to include in the header. The header is displayed on the top of each page of your PDF report. In the preview area, click the header to edit the text, its size, and alignment.

With the configuration in place you can save these settings or download the PDF document using the button at the bottom of the left panel.

Share

Use this button to set the dashboard sharing settings for this dashboard. See [Share a Dashboard] for more detailed information about these settings.

Dashboard View Modes

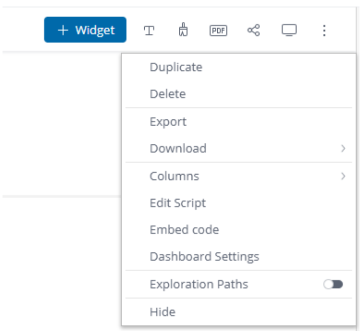
A dashboard is either in Design mode or View mode.

- **Design mode** – Enables you to add widgets and rearrange them on a dashboard. This is the default mode. You can tell that a dashboard is in Design mode because the icon appears in the upper-right corner of the dashboard. Click this icon to change to View mode.
- **View mode** – Displays the dashboard as it looks when a user is viewing it. In View mode, users can only view the dashboard. Even if you are a Designer, you cannot rearrange or edit a dashboard in View mode. You can tell that a dashboard is in View mode because the icon appears in the upper-right corner of the dashboard. Click this icon to change to Layout mode.

Customize a Dashboard's Layout

By default, widgets are arranged on a dashboard one underneath the other. When you add a widget to a dashboard, it is added at the bottom of that dashboard. Each widget occupies a single row when laid out in this manner.

A dashboard's layout can have up to four columns. Each of those columns allows you to have widgets laid out beside and above and below each other. The default layout for a dashboard is a single column, but you can change this to have up to four columns by using the ⋮ Options icon on the right of the dashboard header ribbon and selecting Columns.



You can rearrange the layout of widgets using drag-and-drop. Widgets can sit beside or above and below each other. Widgets that are beside each other create rows; you can move them from one row to another, and insert them into an existing row. You can move widgets can up or down the dashboard. When a row consists of a single widget, and you move that widget to another location on the dashboard, the existing row is removed. A row of widgets only spans the width of the column they are in, so using the Columns functionality described here, you can create a specific layout for your dashboard.

Move Widgets on a Dashboard

You can move widgets around a Dashboard layout using drag-and-drop. With the dashboard in Edit mode, place your mouse cursor over the widget's title so that the cursor changes to the four-sided arrow and hold the left mouse button. The page layout is revealed, showing the placement of existing rows of widgets on the dashboard. Drag the selected widget around the dashboard, and the layout is updated, indicating the new location and the updated layout. Placing a widget above or below an existing widget or row creates a new row; placing a widget to the left or right of an existing widget rearranges the widgets within that row, resizing them accordingly. Release the left mouse button to place the widget in the new position on the dashboard.

Resize Rows or Columns

You can resize rows and columns individually on a dashboard. This also affects the size of the widget that occupies that row or column.

To resize a row or a column:

1. Move the cursor over the visible border between widgets that represents the edge of the row or column.

   When the cursor is over the border, it changes to a two-arrow icon, indicating that you can move the border. You can move a row border up or down; you can move a column border left or right.

   - Cursor indicates that you can change a row height by dragging up or down.

- Cursor indicates that you can change a column width by dragging left or right.

2. With an arrows cursor showing, hold the left mouse button and drag the border to the required location, then release the left mouse button.

   Releasing the left mouse button sets the border in the new location and resizes all widgets accordingly to fill the available space within the row or column.

Distribute Widgets Equally on a Row

Having dragged and dropped widgets around the dashboard, you might want to distribute the widgets equally within a row without having to manually adjust the individual column widths.

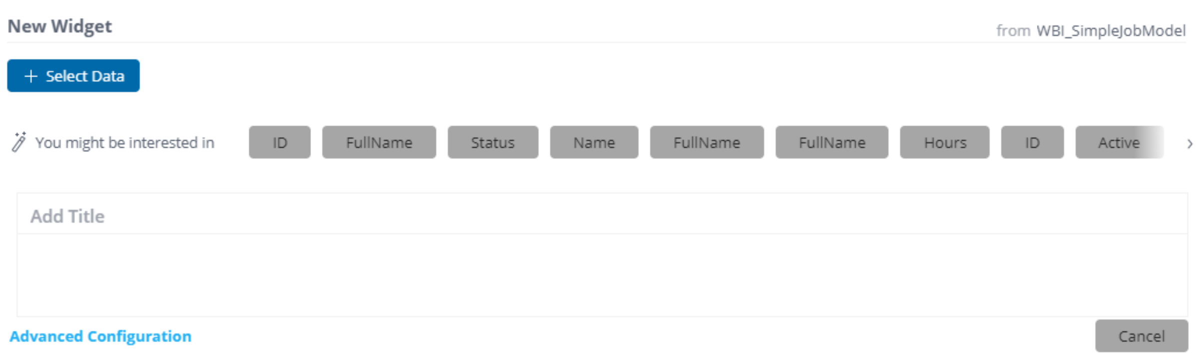
To distribute widgets equally on a row:

1. Navigate to the row that where you want to redistribute the widgets.
2. Left-click on the **Options** icon in the upper-right corner of any widget in that row and select **Distribute Equally in this Row** from the shortcut menu.

Add a Widget to a Dashboard

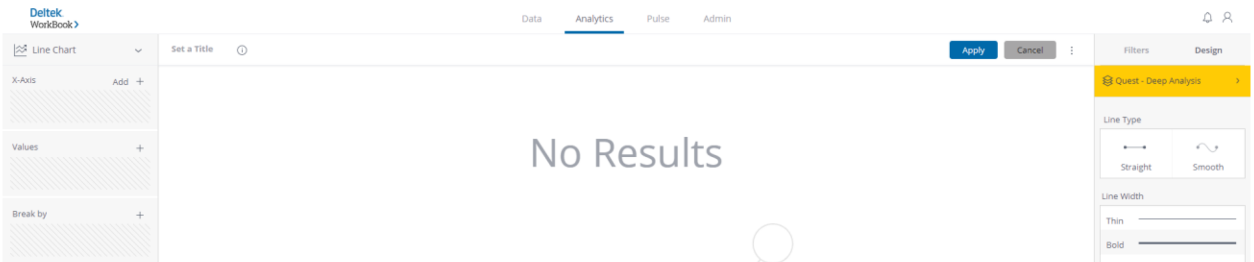
To add a widget to a dashboard use the + Widget button in the top right of the Dashboard Design page. When adding a widget to a new dashboard from the Welcome to your New Dashboard page, it is best practice to first add a title to the dashboard using the icon and then add additional widgets later.

The New Widget dialog box opens. You can either select data or open the Advanced Configuration page. It is best practice to use the Advanced Configuration page; click the Advanced Configuration link in the lower-left corner to open it.



The Advanced Configuration page has three panes:

- The left pane controls the widgets settings, allowing you to select the type of widget that you are adding, as well as the data fields to be used within that widget.
- The center pane gives a preview of what the widget will look like, based on the current settings and configurations applied.
- The right pane controls the filters and design elements of the new widget.

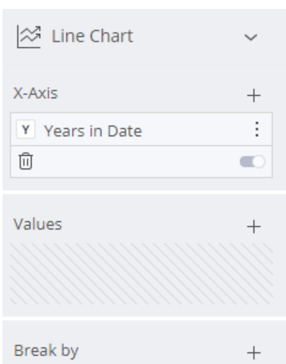


Configure the Widget Settings

To configure widget settings in the left pane:

1. Select the type of widget to add from the drop-down list in the top-left corner.

2. Based on the selection and type of widget, define the data fields to be shown within rows, columns, axes. and values within the widget. The following figure shows an example.



To add a new field to a row, column, or axis:

a. Click the **+** icon to the right of each element.

b. From the **Add a Field** dialog box, select a field to add. All available data tables and data fields from the connected data model are shown within the drop-down list. You can search for a specific field or for all available fields within a specific data table by entering the name of the element within the search field. All available fields that match the search criteria, or all fields within a data table, that match the criteria are displayed.

c. Click on the data field to add it to the widget.

To add a numeric value to a value field:

a. Click the **+** icon to the right of the value or values area.

b. Either select a specific field using the same method outlined in the preceding steps, or create a formula by clicking the *fx* icon to the left of the search field.

   The Create New Formula dialog box opens to allow you to populate a formula by adding fields or specific supported functions to the Expression box, which contains the message **Start typing your expression** if no function or expression is added yet. Precede functions such as SUM or COUNT by a + or – and specify that the field should be added within parenthesis, for example:

   +Count([Name])

   Clicking on fields within the list of fields below the Expression box adds those fields into the formula at the cursor position. Fields are always included within square brackets.

   Hovering the cursor over any field name triggers a tooltip that provides information about the data table and data field being referenced.

   Any errors found in the expression are indicated in red text at the bottom of the dialog box. When the formula is error-free and ready to be added, the OK button is enabled.

c. Click **OK** to add the value to your widget.

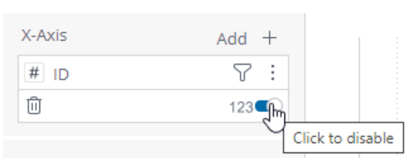
You can rename the field or value by double-clicking the existing name. When you are finished, click to apply the changed name to the value.

You can further filter or format fields that have been added into rows, columns, and axes of values areas of a widget.

When you hover the cursor over the field, a Filter icon appears in the upper-right beside the field name. You can apply a variety of filtering depending on the nature of the field. For example, you can filter text fields for specific words, while you can apply value filters to numeric field. A Ranking option is available within the filter options of both numeric and text fields; it allows you to specify a certain number of results—for example, you can create a Top 10 list by applying a Ranking filter to a specific field.

You can delete fields from a widget using the icon in the lower-left corner of the value field.

You can enable or disable fields using the toggle in the bottom-right corner. Fields that are disabled do not appear in View mode or for viewers of the widget on the dashboard.



You can format numeric values in several different ways. If you hover the cursor just to the left of the enable toggle, the numeric formatting and sorting icons appear. These allow you to format numeric values, or to sort in a specific order. In some contexts, you can do color formatting, such as for line charts, or for applying conditional formatting to numeric indicators.

> **Tip:** This formatting is lost if you change the dashboard's color palette, so best practice is to apply the dashboard color palette first, and then apply the widget-level color formatting.

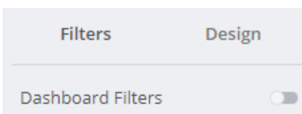
Configure Widget Filters and Widget Design

Configure Widget Filters

There are three parts to the configuration of filters in the right pane:

You can configure the filters that exist on the dashboard to which the widget belongs to either apply in full or in part to the widget, or to be ignored completely. The Filters tab lists all existing dashboard filters.

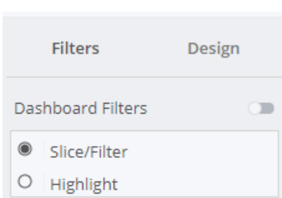
- To ignore all of the dashboard filters, disable them using the **Dashboard Filters** toggle.

  Alternatively, individual filters can be ignored by disabling them individually, using the toggle beside each of them.

  > **Note:** You can only disable or enable dependent filters as a whole, and individual parts of a dashboard dependent filter cannot be ignored.

- To configure the impact of a filter on a widget, select **Slice/Filter** or **Highlight**.

  - Slice/Filter has the effect of filtering the widget specifically, based on the dashboard filters that are applied.
  - Highlight only applies a highlight shading to data that is selected by the dashboard filters, but unselected data is not filtered out.

- To add specific widget-level filters that only apply to this widget. You can add fields to apply a filter on by clicking the + icon to the right of the Widget filters area. After you add a field, you include or exclude specific values in that field via the filter.

> **Note:** You should use this type of filter with care, because dashboard users will not be able to impact or change this filter.

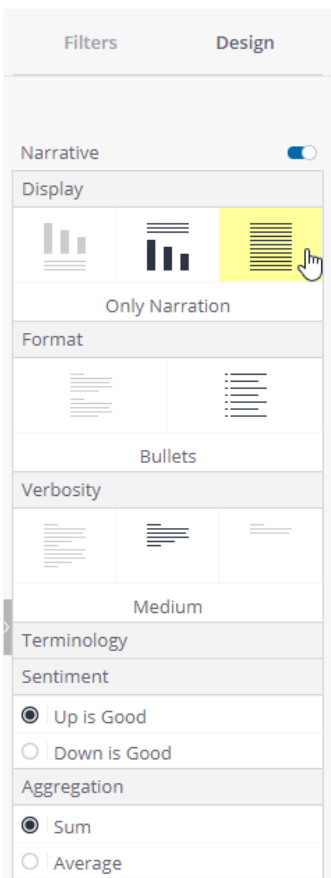
Configure Widget Design

You can apply specific design elements related to the selected widget using the Design tab in the right-side pane. These elements differ, depending on the widget that you are adding. Widget design elements can include the definition of line style for graphs, and the inclusion, positioning and formatting of legends, markers, axes, and value markers.

Widget Narrative

Some widgets support narratives. These are add-on elements of the widget that you can include along with the widget or on their own. You enable them using the narrative toggle in the Widget Design pane.

Enabling a narrative opens another range of settings that are specific to the appearance of the narrative.



You can set the position of the narrative either above or below the visualization, or choose to show only the narrative and hide the visualization. This can be helpful when you want to place a visualization and related narrative side by side.

You can format narratives as paragraphs of text or bulleted lists. You can set the amount of detail included via the Verbosity setting. You must also provide detail to the narrative about the terminology it should use, indicating the singular and plural naming of the data points to be referenced in the narrative (which are based on those included in the widget itself). Sentiment relates to the nature of the underlying data and whether positive or negative values and movements are to be interpreted as good.

Preview the Widget

Changes that you make to the configuration of the widget update the preview of that widget in the center pane. The only change that you can apply specifically to a widget in the center pane is to add or change the name of the widget. The widget name is shown on the dashboard and can be useful, but is not a requirement for a widget.

Return to the Dashboard View

When you have configured the widget as required, click **Apply** in the top-right of the page. All changes are applied to the widget, and you are returned to the Dashboard view page.

If you click **Cancel** you are returned to the Dashboard view page, but none of your changes are applied to the widget or saved.

Copy a Widget

Copy a Widget on the same Dashboard

To copy a widget within a dashboard:

1. Ensure that the dashboard is in Edit mode.
2. Find the widget that you want to copy.
3. Click the ⋮ **Options** icon in the upper-right and select **Duplicate** from the shortcut menu.

A copy of the widget is created immediately beside the existing widget. All elements of the original widget are duplicated in the new copy.

This is particularly useful when you want to apply a similar configuration of settings to two different widgets, where you can create the first widget, then duplicate it, before applying configuration changes to the copy version.

Copy a Widget to another Dashboard

To copy a widget to another dashboard:

1. Ensure that the dashboard is in Edit mode.
2. Find the widget that you want to copy and position the cursor over its title area so that the cursor changes to a four-sided arrow.

3. Click and hold the left mouse button to select the widget in the same way that you would if you were moving it around the dashboard, but instead, drag it to the list of dashboards that are shared with you, in the left pane.

   As the cursor moves over a dashboard, the icon changes to represent a line chart with a small circular plus in the lower-right corner. The tooltip that opens also indicates the dashboard into which the widget will be copied.

4. If this is the correct dashboard, release the left mouse button.

   The widget is copied to that target dashboard. When you open that dashboard, the copied widget is located at the bottom.

Add Tabs to a Dashboard

You can configure a dashboard to include tabs, using a tabber widget. The tabber widget adds tab headings to a dashboard to hide or unhide widgets on the dashboard based on which tab heading is selected.

> **Note:** The suggested maximum number of widgets of 20-25 per dashboard still applies, even if you use a tabber, which itself counts as a widget. A tabber controls the visibility of individual widgets on the dashboard, rather than creating individual dashboards for each tab.

Add a Tabber Widget

To add a Tabber widget to a dashboard:

1. Click the **+ Widget** button in the top right of the Dashboard Design page.
2. In the New Widget dialog box, click **Advanced Configuration** in the lower-left corner.
3. On the Advanced Configuration page, select the **Tabber** widget type from the drop-down list in the top-left corner.

Configure a Tabber Widget

You must configure a tabber widget through scripting.

To add the script:

1. Click the ⋮ **Options icon** at the top right of the preview pane and select **Edit Script** from the shortcut menu. This opens a new browser tab that contains the Script Editing window.
2. Enter the following script into the Script Editing window.

```
widget.on('render',function(w, e){e.prefixText = '';
       e.suffixText = '';
       e.selectedColor = '#5B6674'; /*The color of the chosen title*/
       e.fontColor = '#9096AD'; /*The color of the unchosen titles*/
       e.elementWidth = '100%';
```

```
        e.descColor = '#797E91';
        e.parentMarginLeft = '0px';
        e.height = 32; /* affects the Tabber widget default high*/
        });
    widget.tabs = [
                {title: "Tab Title 1", displayWidgetIds : ["", ""],
        hideWidgetIds : ["", ""]},
                {title: "Tab Title 2 ", displayWidgetIds : [""],
        hideWidgetIds : ["", ""]},
        ];
    widget.tabsConfig = 'multiply'
```

Editing the Tabber Widget Script

You can edit the following parts of the script.

Configure the Font Color of the Selected Tab

```
e.selectedColor = '#5B6674'; /*The color of the chosen title*/
```

You can add a Hex code into this line, within the single quotation marks, to apply a font color to the name of the selected tab.

Configure the Font Color of the Unselected Tab

```
e.fontColor = '#9096AD'; /*The color of the unchosen titles*/
```

You can add a Hex code into this line, within the single quotation marks, to apply a font color to the names of all of the unselected tabs.

Configure the Individual Tabs and their Contents

You must configure each individual tab that you want to add within your dashboard with three different elements: name, included widgets, and excluded widgets.

```
{title: "Tab Title 1", displayWidgetIds : ["", ""],
      hideWidgetIds : ["", ""]},
```

In preceding example script, two tabs are specifically included. To add more, copy one of the lines and insert it below the line for Tab 2.

- To define the tab's name, edit this part of the script: *{title: "**Tab Title 1**"*, inserting the name of the tab as you want it displayed, within the quotation marks.
- To define the widgets to be displayed on the tab, edit this part of the script for that tab *displayWidgetIds : ["", ""].* You must insert the unique ID number for each widget within the quotation marks. See Finding the Widget's Unique ID for how to locate a widget's unique ID number.

A tab can display one or multiple widgets. If multiple widgets are to be displayed, list each widget ID, contained within double quotation marks and separated by commas.

- You must list all other widgets on the dashboard that are not to be displayed in the tab in this part of the script: *hideWidgetIds : ["", ""]},* You must list the unique ID number for every widget not to be displayed within double quotation marks and separated within the list by commas. See Finding the Widget's Unique ID for how to locate a widget's unique ID number.

Example

For a tab called My Tab, to show widgets 12345 and 39495, but not show widgets 98763 and 64561, the line of script looks as follows:

```
{title: "My Tab ", displayWidgetIds : ["12345 ",”39495”], hideWidgetIds : ["98763",
"64561"]},
```

After you have completed entering and editing the script, click **Save** in the upper-right. A small confirmation notification tells you that the script is saved. You can close the browser tab, returning to the widget editing browser tab.

Click **Apply** in the upper-right corner of the widget preview pane and return to the parent dashboard.

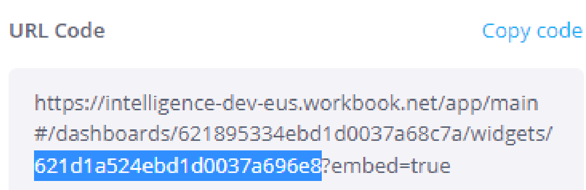
Finding the Widget's Unique ID

Every widget component has a unique numeric identifier that must be used within the tabber script to indicate which widgets are to be displayed or hidden on each of the tabs that you define.

To locate a widget's unique ID:

1. Open the widget configuration screen.
2. Locate the widget on the dashboard and click the ✎ **Edit icon** in the top right beside the widget title.
3. In the widget configuration window, click ⋮ **Options icon** and select **Embed Code** from the shortcut menu.

   The Embed Code pane for that widget opens.
4. Under **URL Code**, locate the long numeric code that follows the **widget/ text** within the URL.



> **Tip:** It can be easier to copy the full URL code to a text editor and locate the widget ID within the text editor.

Creating Drill-Downs

WorkBook intelligence allows you to create nested dashboards that are suitable for drilling down into the detail of widgets on a dashboard. Such dashboards are initiated from a widget, and open a new dashboard on the page for the user.

WorkBook Intelligence supports two methods:

- Accordions
- Drill-downs (Jump-to dashboards)

Each supports a specific use case and can only be called from particular types of widgets.

Accordion Dashboards

The accordion dashboard enables you to toggle between different sub-dashboards on demand by clicking an indicator widget. This is useful for providing large amounts of information within a limited space. You can only call an accordion from an indicator widget, though that indicator can be in either the numeric or gauge style.

Creating an Accordion Dashboard

Any dashboard can be an accordion, but it requires a specific naming convention to be identified as such. An accordion dashboard can contain any number of widgets and can inherit the filters of the parent dashboard if required.

To create an accordion dashboard:

1. Create a dashboard in the normal method as described in Create a Dashboard. It is good practice to place the accordion dashboard in the same dashboard folder as the parent so that you can manage and organize related dashboards easily.
2. After you create the dashboard, rename it using **_accrd_** as the prefix of the name. Without this prefix WorkBook Intelligence cannot identify the dashboard as being an accordion dashboard. The rest of the name should be meaningful relative to the use of the dashboard, but it must contain the prefix.

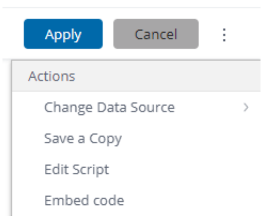
An accordion dashboard behaves like any other dashboard, and so you can add widgets and edit or customize it in any of the ways described in this guide.

Linking an Accordion Dashboard to the Indicator Widget

You must now add a script to the indicator widget to call the accordion dashboard.

To link an accordion dashboard to its indicator widget:

1. Locate the indicator from which you want to call the accordion, and click the ✐ pencil icon in its top right corner to open it for editing.
2. With the widget open, click the ⋮ **Options** icon at the top right of the preview pane to and select **Edit Script** from the shortcut menu. This opens a new browser tab that contains the script editing window.



3. Paste the following script into the script editing window:

```
widget.on('ready', function(){
Accordion({

//default: true, // uncomment this to make accordion to open on start

element: element,
widget: widget,
dashboard: dashboard,
dashboardName: 'Accordion Dashboard name',

filters: ["[Table 1.Field 1]","[Table 2.Field 2]"], //List the Table and Fields that are to apply as filters to the Accordion dashboard. In general these should align to the Dashboard filters of the indicator widget that calls the Accordion dashboard

dashboardFiltersInheritance: false, //gives the possibility to apply all of the filters from the parent dashboard to the Accordion dashboard

widgetFiltersInheritance: false // set to true if you want the Accordion dashboard to inherit the widget filters
});
})
```

4. Next, edit the following parts of the script:

```
dashboardName
```

Replace **Accordion Dashboard name** with the exact name that you gave to the accordion dashboard, including the **_accrd_** prefix. This name should appear within single quotation marks as indicated in the script.

```
Filters:
```

You can enforce the inheritance of selected filters by the accordion dashboard by listing the tables and fields in the `filters:` line of the code. Alternatively, add **//** to the beginning of this line (it should cause the whole line to change to green text) to comment out the enforced filter inheritance. Place all enforced filters within square brackets, with the table name separated from the field name by a single period. Each item should also have single quotation marks around the filter, and multiple filters should be separated by commas.

Note:

- This script is not updated dynamically. If you change the name of the accordion dashboard in any way, you must update the script.
- If you do not include the **_accrd_** prefix in the accordion dashboard name, the accordion behavior is not triggered, regardless of applying this script.

When using the enforced filters line of the script, any filters that you want the accordion dashboard to inherit must be explicitly listed. Any filter that is not listed is not inherited, regardless of whether it is within the filters of the parent dashboard.

5. After you have completed entering and editing the script, click the **Save** button in the upper-right corner. A small confirmation notification tells you that the script is saved. You can close the browser tab, returning to the widget editing browser tab.

6. Click **Apply** in the upper-right corner of the widget preview pane and return to the parent dashboard.

You can tell that an indicator widget has an accordion attached by the visual indicator on the left of the widget title, and the fact that the mouse cursor changes when you scroll over that indicator. Clicking the indicator with the mouse now opens the accordion dashboard.

Drill-Down Dashboards

Drill-down dashboards allow users to get a deeper level of detail behind a specific number in a pivot. Drill-downs are best used with pivot widgets.

Creating a Drill-Down Dashboard

Any dashboard can be a drill-down dashboard, but it requires a specific naming convention to be identified as such. A drill-down dashboard should ideally contain just a single widget.

To create a drill-down dashboard:

1. Create a dashboard in the normal method as described in [Create a Dashboard](#).

   You should create the drill-down dashboard in the same folder as the parent dashboard because this helps with the linking of the two dashboards later in the process.

2. After you create the dashboard, rename it with **_drill_** as the prefix of the name. Without this prefix WorkBook Intelligence cannot identify the dashboard as a drill-down dashboard. The rest of the name should be meaningful relative to the use of the dashboard, but it must contain the prefix.

A drill-down dashboard behaves like any other dashboard, but it should contain only a single widget. That widget should be a copy of the pivot widget that calls it. You can then edit the copied widget in such a way that the information that you are presenting supports a deeper level of detail relative to the numeric value that called it.

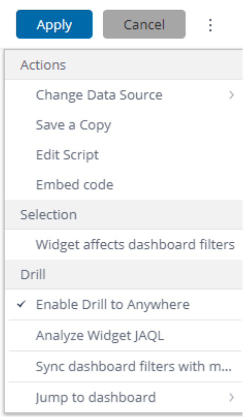
Linking a Drill-Down Dashboard to a Pivot Widget

> **Attention:** A key requirement for the linking of a drill-down dashboard is that the drill-down and the pivot widget that triggers it must share the same data source.

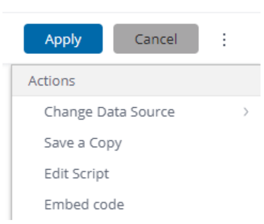
There are two parts to the linking of the drill-down dashboard to the pivot widget.

To link a drill-down dashboard to a pivot widget:

1. Locate the pivot widget from which you want to call the drill-down and open its edit window.
2. Click the ⋮ **Options** icon in the top-right corner of the preview pane and click **Jump to Dashboard** on the shortcut menu. Another menu displays all of the available dashboards with the prefix _drill_ that are in the same folder and the parent dashboard.
3. Select the dashboard that you want to link to from the pivot widget.



4. With the pivot widget still open, open the ⋮ **Options** shortcut menu again and select **Edit Script**. This opens a new browser tab that contains the script editing window.



5. Paste the following script into the script editing window:

```
prism.jumpToDashboard(widget, { displayDashboardsPane:false,
displayFilterPane:false ,displayToolbarRow :false, displayHeaderRow :false});
```

You can use this script without applying any edits. It defines the layout of the dashboard that opens, ensuring that peripheral elements are not included and that only the single dashboard contained in the drill-down dashboard is visible when opened on-screen.

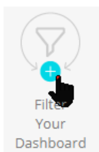
Using Filters

Work with Dashboard Filters

Create Dashboard Filters

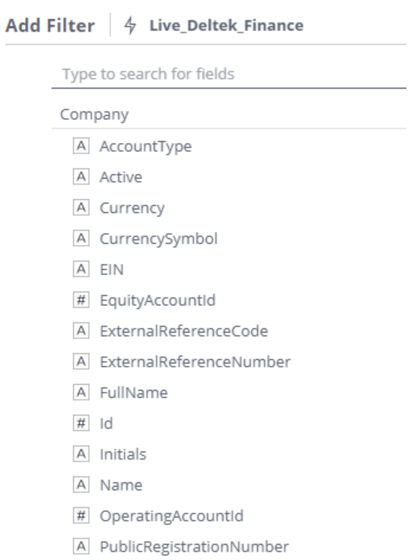
To create a dashboard filter:

1. Navigate to your dashboard.
2. Do **one** of the following:
   - Click **Filter Your Dashboard** in the Filters panel at the right side of the dashboard as shown in the following figure. This is only available if there are no existing filters on the dashboard.

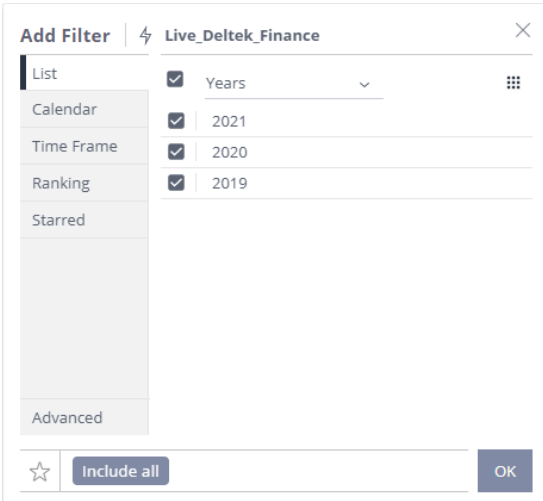
     

   - Click **+** in the upper-right side of the Filters panel to add to existing filters.

   The Add Filter dialog box is displayed. The following figure shows an example.



3. Select the field by which to filter. A dialog box like the following figure appears so that you can choose the type of filter.



4. Select the type of filter from the **List** pane, such as List, Criteria, Calendar, or Time Frame. The filter types from which you can choose are contextual, depending on the type of field that you selected to filter on (Date, Numeric, or Descriptive).
5. Select the required filter details in the right-hand panel to create one of the following types of filters:
   - List Filter
   - Text or Values Filter
   - Top/Bottom Ranking Filter
   - Calendar Filter
   - Dependent Filters
6. Click **OK** to filter the data on the dashboard and add this filter to the Filters panel on the right side of the dashboard.

Create List Filters

These are the most common filters and support every type of data field. All available values within the data field are listed and you can select or deselect one or multiple values.

To create a list filter:

1. Select **List** option in the left pane.
2. Select/clear the field values to be included/excluded in the dashboard.
3. Click **OK** to filter the data in the dashboard and add a list filter to the Filter pane of the dashboard.

Create Text or Values Filters

This type of filter enables you to filter data using matching criteria.

To create a text or values filter:

1. Click the **Text tab** or the **Values tab**, depending on the type of data field you are using (text or numeric).
2. Select the operator, for example, Starts with or Containing for Text filters, or Greater Than or Equal To for Values filters.
3. Enter the value by which to filter.
4. If you require additional conditions, click **+ Add condition**. Select AND or to define how filter operators are combined.
5. Click **OK** to apply the filter to your dashboard.

Create Top/Bottom Ranking Filters

These are particularly useful in providing a filter of only the top or bottom values in a data field.

To create a top/bottom ranking filter:

1. Select the **Ranking Filter tab**.
2. Select **Top** or **Bottom** and the number of items to include.
3. In the **By** field, select a field by which to rank the fields. A list of the fields that match these definitions is displayed so that you can verify that the results are as you expect.
4. Click **OK** to filter the data in the dashboard and add a ranking filter to the Filter pane of the dashboard.

Create Calendar Filters

This filter enables you to select custom date ranges from a calendar.

To create a calendar filter:

1. Select the **Calendar Filter** tab.
2. Use the quick navigation menu to jump to a point in time.
3. Select a date range using any of the following methods:
   - Use the calendar to select a date range to filter by. Use the left calendar to select the starting date of the range, and the right calendar to select the end date.
   - Enter the dates.
   - Use a shortcut such as Earliest Date or Today.

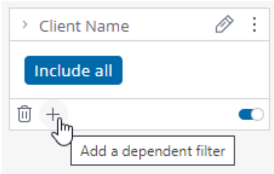
   > **Note:** Earliest Date and Latest Date refer to the earliest and latest dates with data.

4. Click **OK** to filter the data in the dashboard and add a date filter to the Filter pane of the dashboard.

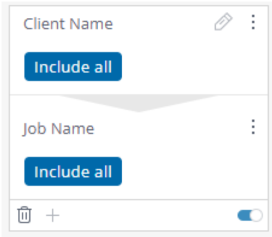
Create Dependent Dashboard Filters

Dependent Filters are extremely useful and combine multiple dashboard filters into a hierarchy of filters where each lower-level filter shows only the options relevant to its upper-level filters. Within the filter hierarchy, when you filter the upper-level filter, fewer options are available within the lower-level filters, based on that filter selection. This can be useful to limit filters to show only projects that belong to a previously filtered company, or employee resources working in a previously selected company.

First, add the highest-level filter in the hierarchy using any of the methods outlined in the preceding sections. With that filter added, use the + icon below the existing filter to add a dependent filter, or use the ⋮ Options icon shortcut menu to the right of the filter.



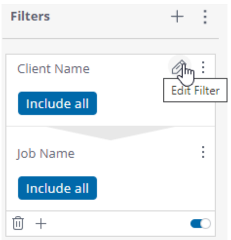
Define the next-level filter in the hierarchy in any of the preceding manners. When you add the next filter, notice that it is added below the previous level, with an arrow indicating the dependency, and grouped visually within a single box.



> **Note:** A dependent filter always applies as a whole to widgets in a dashboard, and you cannot disable individual members of a dependent filter when applied to a widget on the dashboard.

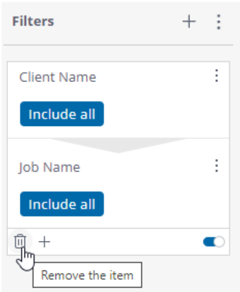
Edit Dashboard Filters

You can edit a filter by hovering the mouse in the upper-right corner of a filter to reveal the Edit icon. Clicking this icon opens the Filter Settings page, where you can edit the filter according to the details described in the preceding step-by-step procedures.



Delete Dashboard Filters

You can delete a filter by clicking the Delete icon in the lower left corner. For single filters, this action removes the filter as a whole; for dependent filters, this action removes the lowest-level filter within the dependent filter group, but leaves the higher levels intact.



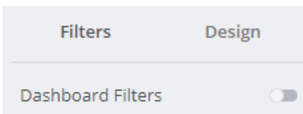
Work with Widget Filters

You configure widget filters on the Filters tab in the right pane of the Widget configuration page. To configure widget filters, you must have the widget open.

There are two levels of widget filters, those inherited from the dashboard, and those that specifically apply to the widget, independent of the dashboard filter.

You can manage the impact dashboard filters have on a widget by enabling or disabling individual filters or dependent filters.

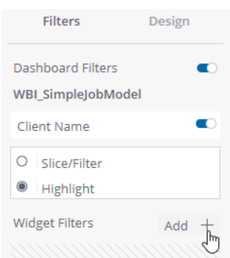
- To ignore all of the dashboard filters, disable them using the **Dashboard Filters** toggle.

  Alternatively, individual filters can be ignored by disabling them individually, using the toggle beside each of them.

  > **Note:** You can only disable or enable dependent filters as a whole, and individual parts of a dashboard dependent filter cannot be ignored.

You can add specific widget-level filters that only apply to this widget. To do this click the + icon to the right of the Widget Filter area, and the new filter dialog box opens.



Then follow the steps provided in Work with Dashboard Filters to add new filters.

Other Dashboard Tasks

Copy a Dashboard

When you copy a dashboard, it creates another copy of the dashboard with a different name. This new dashboard is completely separate from the original, and you are its owner, which means that you have full editing rights to that dashboard. When you copy a dashboard, the new dashboard is added to your Dashboards list below the copied dashboard, with the same name plus a number, in the order in which it was created. For example, if you copy a dashboard whose name is Client Analysis, the first copy's name is Client Analysis (1). You can then rename it with a more meaningful or useful name, as appropriate.

To copy one dashboard:

1. Locate the dashboard in the **Dashboards list**, hover to the right of its name, and click the ⋮ **Options** icon.
2. Select **Duplicate** from the shortcut menu.

The dashboard is copied, and the name of the copy appears in the Dashboards list.

To copy multiple dashboards:

1. Click at the top of the **Dashboards list** to display check boxes in front of dashboard names.
2. Select the check boxes for the dashboards that you want to copy, then click **Duplicate** at the bottom of the **Dashboards list**.

   The dashboards are copied, and the names of the copies appear in the Dashboards list.
3. Click again to hide the check boxes.

> **Tip:** To copy all of the dashboards in a folder, select the folder. The folder's dashboards are copied to the root of the Dashboards list. Their names appear highlighted in yellow for a brief time.

Export a Dashboard

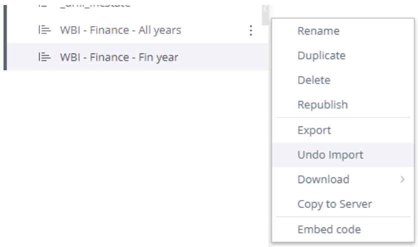
You can export one or more dashboards at one time. When you export one or more dashboards, a single .dash file is created. You can then import this file back into WorkBook Intelligence.

> **Note:** All of the following methods prompt you to download and save .dash files to disk.

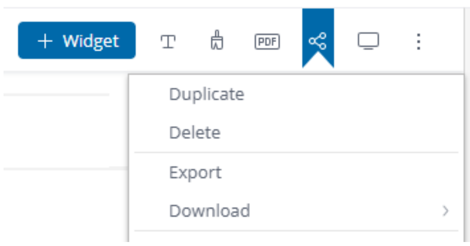
To export a single dashboard to a .dash file:

➢ Use **either** of the following methods:

- On the **Dashboards list**, click the ⋮ **Options** icon and select **Export Dashboard** on the shortcut menu.



- Click the dashboard's ⋮ **Options** icon on the header ribbon and select **Export** on the shortcut menu.



To export multiple dashboards to a .dash file:

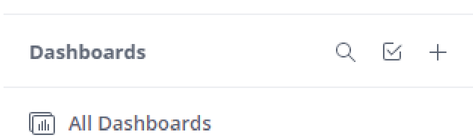
1. On the **Dashboards list**, click ☑ to display check boxes in front of dashboard and folder names.
2. Select the check boxes for the dashboards and/or folders that you want to export.
3. Click ☑ at the bottom of the **Dashboards list** to export the selected items.

Tip: If you manage and organize related dashboards in folders, you can easily select a single folder to export all of the dashboards in that folder to a single .dash file.

Import a Dashboard

To import a dashboard:

1. Click **+** at the top-right of the **Dashboards list**.

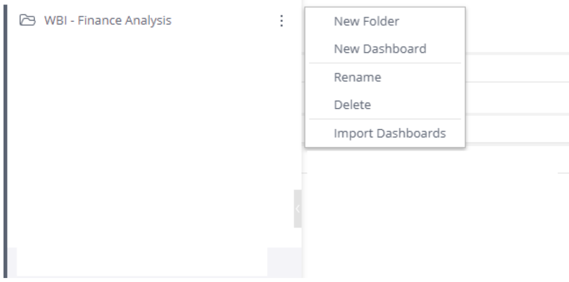


2. Select **Import Dashboards** from the shortcut menu.
3. Browse to the location of your exported dashboard (.dash file), for example, using Windows Explorer.
4. Select your exported dashboard (.dash file).

A dialog box displays the message **Dashboard Imported Successfully**. The dashboard is added to your Dashboards list. You can drag it to another, more appropriate, location in the Dashboards list if needed.

To import a dashboard into a folder:

1. Do **either** of the following:
   - Right-click anywhere in the **Dashboards list**.
   - Click the ⋮ **Options** icon of an existing folder.



2. Select **Import Dashboards** from the shortcut menu.
3. Browse to the location of your exported dashboard (.dash file), for example, using Windows Explorer.
4. Select your exported dashboard (.dash file).

A dialog box displays the message **Dashboard Imported Successfully**. The dashboard is added to your Dashboards list. You can drag it to another, more appropriate, location in the Dashboards list if needed.

Delete a Dashboard

Warning: You cannot recover a deleted dashboard. Be sure that you want to delete a dashboard before you delete it. To avoid mistakes, you can back up your dashboards by exporting them.

Attention: You can only delete dashboards that you own.

To delete one dashboard:

1. Do **one** of the following:
   a. Method 1: Navigate to the dashboard that you want to delete, click that dashboard's ⋮ **Options** icon, and select **Delete** on the shortcut menu.
   b. Method 2:
      i. Locate the dashboard's name in the **Dashboards** list and click ⋮ **Options** icon.
      ii. Select **Delete** on the shortcut menu. A confirmation dialog box is displayed.
      iii. Click ✓ to delete the dashboard.

The dashboard is deleted, and its name is removed from the Dashboards list.

To delete multiple dashboards:

1. Do **one** of the following:
   - Use the Dashboards list view:
     a. Open the list view.

b. Select the check boxes of the dashboards that you want to delete.

c. Click **Delete**.

- Use the Navigation pane:

a. Click .

b. Select the dashboards that you want to delete.

c. Click **Delete**.

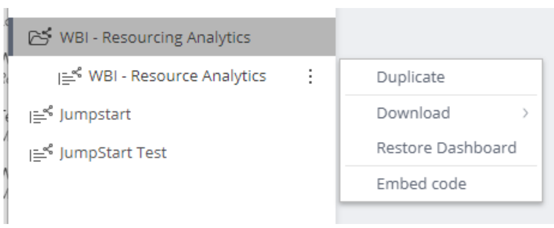
The selected dashboards are deleted, and their names are removed from the Dashboards list.

Get the Dashboard Embed Code

The Embed Code for a dashboard is the URL that will be used in WorkBook's iFrame to share that dashboard in the WorkBook application.

To generate an Embed Code for a dashboard:

1. Find the dashboard that you want to share in the left-side **Dashboards list**.
2. Click the ⋮ **Options icon** and select **Embed Code** from the shortcut menu to open the Embed Code configuration pane.



Suggested settings for the Embed Code are as follows:

- In **Mode**, select **View** from the drop-down list to be the embed mode.
- In **Configuration**:
  - Select the check box to enable **Show Right Panel**; this adds the dashboard filters to the dashboard that you embed into WorkBook.
  - Deselect the check boxes to disable **Show Left Panel**, **Show Toolbar**, and **Show Header**. You should disable these because they have no value to dashboard users and render the dashboard much smaller than required.
- Do not edit or change the base URL as it is displayed in the Embed Dashboard dialog box.

3. Click **Copy Code** to the right of **URL Co**de. This is the URL to paste into an iFrame.card within the WorkBook application.

Share a Dashboard

The Share icon in the ribbon header of a dashboard enables you to share access to that dashboard with your colleagues. Until you add sharing to a dashboard, that dashboard only you can access that dashboard, even if other users in your organization have the Embed Code URL link.

To share a dashboard:

1. In your dashboard's ribbon heading, click **Share**. The Email Reporting Settings dialog box opens to list all users who have existing access to the dashboard. If it has not previously been shared, only your user name is listed.

   You can provide access to individual users or your company's user group.

   > **Tip:** It is best practice to share access to a dashboard with your company's user group because this does not require later maintenance of the users who have access.

2. To share access to the dashboard with a new group, begin typing the company group name in the search field above the users list. Available groups and users are listed in the search results.
3. Select the appropriate groups and users to whom you want to give access to the dashboard.

   You can give groups and users either View or Edit access. Edit access is only available to users who have WorkBook Intelligence Designer licenses. All other users have View access. Edit access allows you to share dashboard access with other designers in your organization who can also edit the dashboard.
4. Use the Can View drop-down list to assign access levels.
5. Click **Save**.

> **Note:** All other functionality provided on the Email Reporting Settings dialog box is currently not supported.

Sharing a dashboard initiates sharing of the underlying data model with those users, and in some cases, if the data model has not yet been shared, you receive a notification that indicates that access to the data models will be shared with those users. Confirm the notification to ensure that the users can see the data within the dashboard.

After you have given any additional users or groups access to a dashboard in this manner, the tooltip for the icon changes to *Click to republish the dashboard*. If you have existing changes that are not yet published, the tooltip indicates *Pending Republish.*

> **Note:** You must share access to any dependent dashboards—such as drill-down or accordion dashboards—individually with the same users. Access to dependent dashboards is not automatically inherited with shared access to the primary dashboard.

Republish a Dashboard

After you have shared access to a dashboard with other users or groups, you can use the icon in the dashboard header ribbon to republish a dashboard.

Republishing a dashboard shares all edits and changes that have been applied to a dashboard with the users who have shared access to it. Until a dashboard is republished, users cannot see changes that have been applied.

To republish a dashboard:

1. Click the icon in the dashboard header ribbon.

   The Email Reporting Settings dialog box displays the list of users who have shared access to the dashboard. You can add users to or remove users from the list if needed.

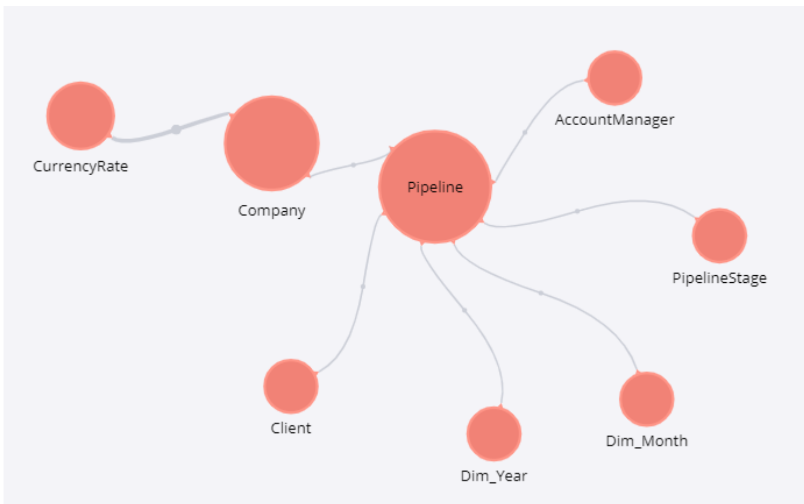
2. Click Republish to republish the dashboard and share changes with the users who share access to it.

Available Data Tables and Fields

The following tables describe the data tables and fields that have been included within the data models that support the standard WorkBook Intelligence dashboards. You can use any of these models to create your own custom dashboards.

CRM Data Model

This data model supports the CRM Analysis dashboard.



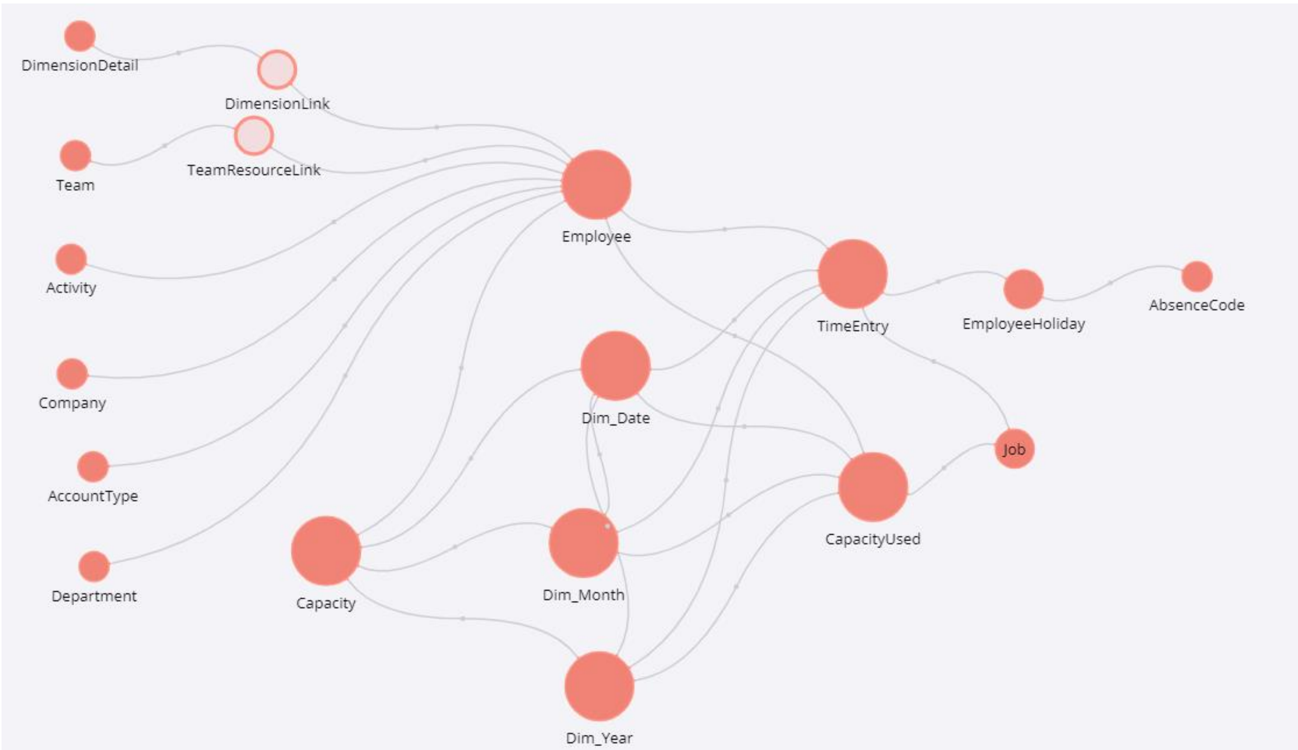
Data Table Name	Data Field Name
AccountManager	ID
	Name
	Initials
	FullName
	Active
Client	ID
	Name
	Initials
	Fullname
	Active
	ResourceType

Data Table Name	Data Field Name
Company	ID
	Name
	Initials
	Fullname
	Currency
	CurrencySymbol
	AccountType
	Active
CurrencyRate	CurrencyTable
	SourceCurrencyName
	SourceCurrencyISOCode
	TargetCurrencyName
	TargetCurrencyISOCode
	FromDate
	ToDate
	Factor
	Rate
Dim_Month	Month
Dim_Year	Year
Pipeline	Title
	Lost
	LostReason
	LostDescription
	Active
	Status

Data Table Name	Data Field Name
	StatusComment
	Rating
	FromDate
	FromDateYear
	FromDatemonth
	YearOnYearDate
	CompanyAmount
	CompanyProbabilityAmount
	Probability
PipelineStage	Name

Resources Data Model

This data model supports the Resourcing dashboard.



Data Table Name	Data Field Name
AbsenceCode	Description
AccountType	AccountType
Activity	ID
	ShortName
	Name
	FullName
Capacity	Capacity
	DateYear
	DateMonth

Data Table Name	Data Field Name
	IdealHours
	BasicHours
	MaximumHours
	HolidayHours
	DayType
	VacationType
CapacityUsed	Date
	DateYear
	DateMonth
	DateMonth
	UsedHours
	CompletedHours
	BookedHours
Company	ID
	Name
	Initials
	FullName
	Currency
	CurrencySumbol
	AccountType
	Active
Department	Name
	Description
	ExternalNumber
	ExternalCode

Data Table Name	Data Field Name
	Responsiblename
	ResponsibleInitials
	ResponsibleFullName
Dim_Date	Date
	Year
	Month
Dim_Month	Month
Dim_Year	Year
DimensionDetail	Number
	Code
	Name
	Active
	DimensionNumber
	DimensionName
	DimensionsActive
EmployeeHoliday	Name
Employee	ID
	Name
	Initials
	FullName
	Type
	HireDate
	HireDateYear
	HireDateMonth
	ExpiryDate

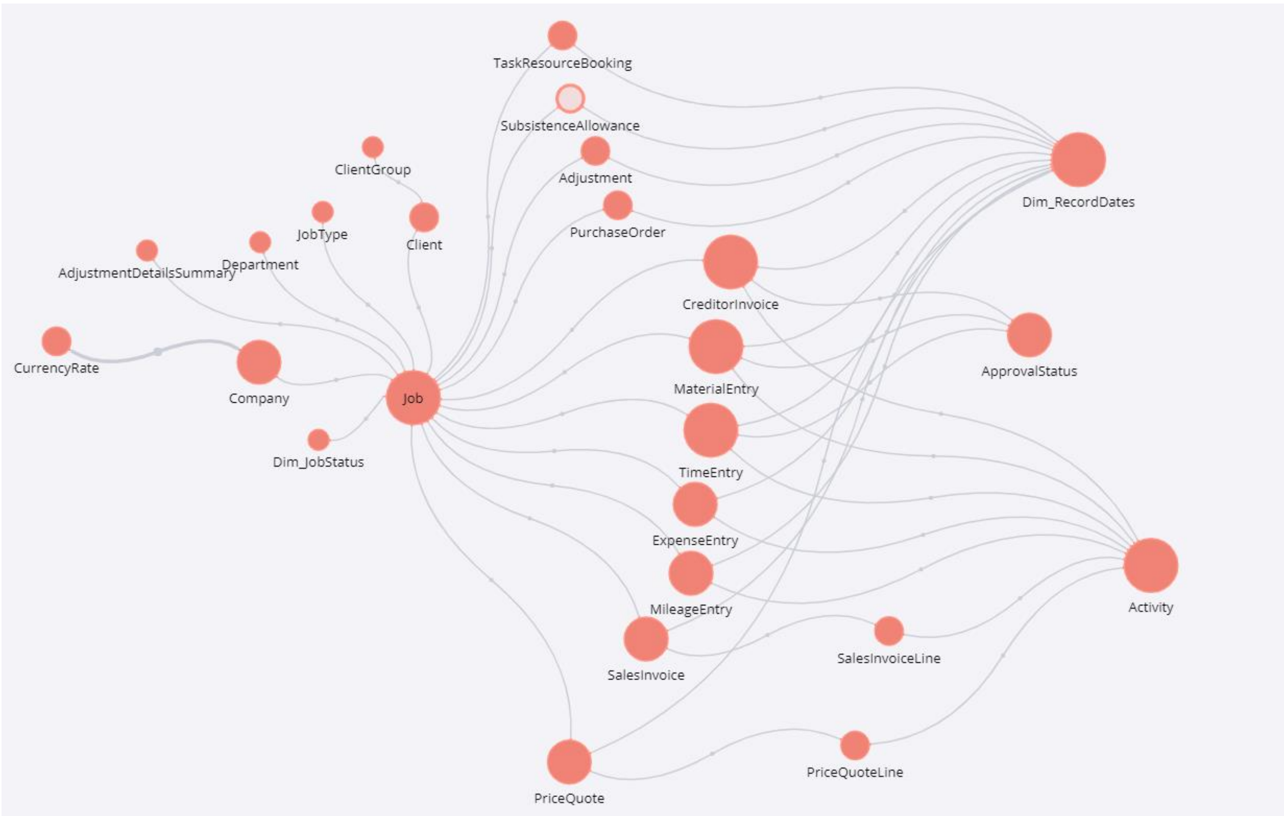
Data Table Name	Data Field Name
	ExpiryDateYear
	ExpiryDateMonth
	Active
	AllowTimeEntry
Job	ID
	Name
	FullName
	StartDate
	StartDateYear
	StartDateMonth
	EndDate
	EndDateYear
	EndDateMonth
	JobStatus
	SimpleJobStatus
	Billable
	AllowTimeEntry
	ProjectName
	CompanyName
	CompanyInitials
	CompanyFullName
	Clientname
	ClientInitials
	ClientFullName
Team	Name

Data Table Name	Data Field Name
	ExternalNumber
	ExternalCode
	StandardTeam
	TicketTeam
	TeamLeadername
	TeamLeaderInitials
	TeamLeaderFullName
TimeEntry	JournalNumber
	RegistrationDate
	RegistrationDateYear
	RegistrationDateMonth
	Postingdate
	PostingdateYear
	PostingdateMonth
	Hours
	MovedHours
	Description
	InternalDescription
	Billable
	Public
	Correction
	CorrectionJobID
	CorrectionNote
	CorrectionDate
	CorrectionDateYear

Data Table Name	Data Field Name
	CorrectionDateMonth
	CorrectionOriginalDate
	CorrectionOriginalDateYear
	CorrectionOriginalDateMonth
	ApprovalStatus
	LastRejectionResource
	LastRejectionResourceName
	LastRejectionResourceInitials
	LastRejectionResourceFullName
	LastRejectionComment
	LastRejectionDate
	LastRejectionDateYear
	LastRejectionDateMonth
	HasApprovedResourceInitials
	HasApprovedNotResourceInitials

Projects Data Model

This single data model supports both the Client and Projects dashboards.



Data Table Name	Data Field Name
Activity	ID
	ShortName
	Name
	FullName
Adjustment	Date
	DateYear
	DateMonth
	Hours
	Material

Data Table Name	Data Field Name
	PurchasesSale
	Total
	JournalNumber
	PostingDate
	PostingDateYear
	PostingDateMonth
	CompletionRate
	ExtraAndDiscount
	NetPurchasesSale
	PurchasesSaleProfit
	AdjustmentUpDown
	ApprovalStatus
	JobAdjustmentType
AdjustmentDetailsSummary	MaximumAdjustmentNumber
	ExpenseType
	PriceQuoteTotal
	ExpenseTotal
	ExpensePartiallyInvoicesTotal
	PreviousAdjustmentTotal
	ActualWIPTotal
	NewAdjustmentTotal
	NewWIPTotal
	PreviouslyPartiallyInvoicedTotal
	InvoicedTotal
	UnbilledTotal

Data Table Name	Data Field Name
	RecognisedInvoicedTotal
	ManualPreviousAdjustmentTotal
	ActualPLTotal
	NewPLTotal
	EACTotal
	PriceQuoteStatus50NetRevenueTotal
	PriceQuoteStatus50Total
ApprovalStatus	ApprovalStatus
Client	ID
	Name
	Initials
	FullName
	Active
	Type
ClientGroup	Title
Company	ID
	Name
	Initials
	FullName
	Currency
	CurrencySymbol
	AccountType
	Active
CreditorInvoice	PurchaseOrderID
	Date

Data Table Name	Data Field Name
	DateYear
	DateMonth
	VoucherNumber
	ProfitMargin
	VATRate
	OriginalNetAmount
	NetAmount
	VATAmount
	SalesAmount
	JournalNumber
	LineType
	ApprovalStatus
	PaymentStatus
	Supplier
CurrencyRate	CurrencyTable
	SourceCurrencyName
	SourceCurrencyISOCode
	TargetCurrencyName
	TargetCurrencyISOCode
	FromDate
	Todate
	Factor
	Rate
Department	Name
	Description

Data Table Name	Data Field Name
	ExternalNumber
	ExternalCode
	Responsiblename
	ResponsibleInitials
	ResponsibleFullname
Dim_JobStatus	Status
Dim_RecordDates	Date
	Year
	Month
Expense Entry	ExpenseEntrytype
	ExpenseEntrytype
	VoucherDate
	VoucherDateYear
	VoucherDateMonth
	VoucherNumber
	Approved
	ApprovalStatus
	PurchaseorderID
	TiedToPurchaseOrder
	Amount
	CrossCompanyEntry
Job	ID
	Name
	FullName
	StartDate

Data Table Name	Data Field Name
	StartDateYear
	StartDateMonth
	EndDate
	EndDateyear
	EndDateMonth
	JobStatusID
	JobStatus
	SimpleJobStatus
	Billable
	AllowTimeEntry
	ProjectName
	CompanyName
	CompanyInitials
	CompanyFullName
	ClientName
	ClientInitials
	ClientFullName
JobType	Name
	Active
	Retainer
MaterialEntry	MaterialType
	MaterialDate
	MaterialDateYear
	MaterialDateMonth
	Quantity

Data Table Name	Data Field Name
	MovedQuantity
	Cost
	Sales
	IntercompanySale
	ApprovalStatus
	JournalNumber
	IntercompanyJournalNumber
	PostingDate
	PostingDateYear
	PostingDateMonth
	RegistrationDate
	RegistrationDateYear
	RegistrationDateMonth
	Closed
MilageEntry	TripDate
	TripDateYear
	TripDateMonth
	DistanceUnitType
	TotalDistance
	ApprovalStatus
	UnitCost
	UnitSale
	RefundCostToEmployee
	EmployeeCarUnitCost
	VoucherNumber

Data Table Name	Data Field Name
	PostingDate
	PostingDateYear
	PostingDateMonth
	Cost
	Sale
PriceQuote	ID
	Date
	DateYear
	DateMonth
	ApprovalID
	ApprovalStatus
	VATAndTaxMethod
	VATRate
	ProbabilityPercent
	DisplayVAT
PriceQuoteLine	Hours
	ContingencyHours
	TotalHours
	HourlyCost
	HourlySale
	MaterialSale
	MaterialCost
	MaterialProfitMargin
	ProfitMargin
	Purchases

Data Table Name	Data Field Name
	Extra
	NetAmount
	PurchaseQuantity
	Discount
	GrossAmount
	BufferAmount
	UnitAmount
	Units
PurchaseOrder	Date
	DateYear
	DateMonth
	DeliveryDate
	DeliveryDateyear
	DeliveryDateMonth
	ProfitMargin
	Cost
	Sale
	VATPercentage
	DeliveryCompleted
	Quantity
	CostPerClient
	Shippingdate
	Shippingdateyear
	ShippingdateMonth
	RemainingCost

Data Table Name	Data Field Name
	HasVoucher
	DetailLevelAmountSpecification
	ApprovalStatus
SalesInvoice	Date
	DateYear
	DateMonth
	VATPercentage
	PrintingDate
	PrintingDateYear
	PrintingDateMonth
	DueDate
	DueDateYear
	DueDateMonth
	ApprovalStatus
	PostedAmountAssociatedWithPartialInvoice
	PostinDate
	PostinDateYear
	PostinDateMonth
	NetAmountVATAttract
	SalesDate
	SalesDateYear
	SalesDateMonth
	SubInvoice
	EliminatePartialInvoice
	PartialInvoiceEliminated

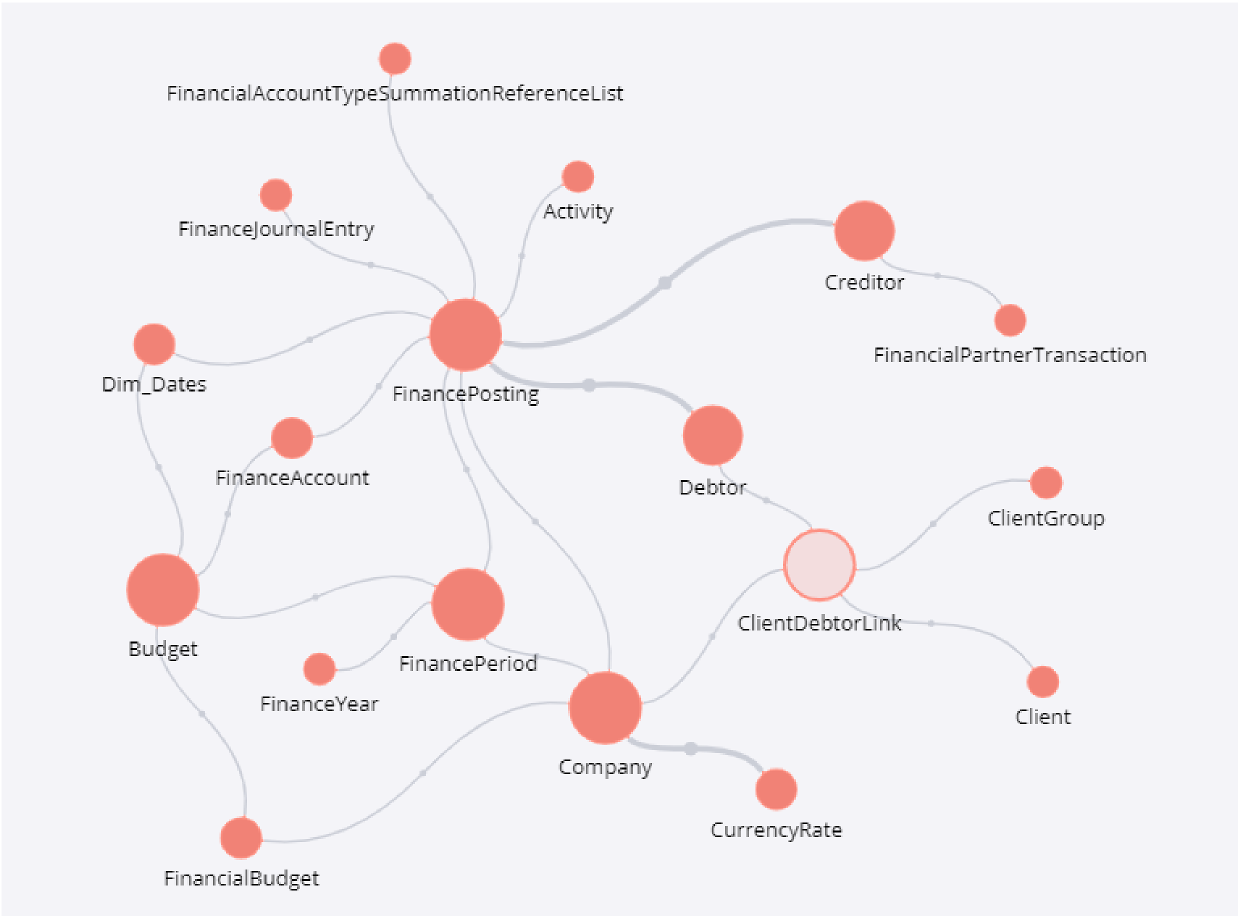
Data Table Name	Data Field Name
	Internal
	RemainingBillingAmount
	InvoiceNumber
	NetAmount
	VATAmount
	TotalAmount
	InvoiceType
SalesinvoiceLine	Profitmargin
	Hours
	VATRate
	HourlyCost
	HourlySale
	NetAmount
	VATAmount
	TotalAmount
	Discount
	MaterialSale
	Purchases
	Extra
TaskResourceBooking	ResourceID
	Hours
	UnbookedHours
	EstimatedRemainingHours
	RegisteredHours
	MarkedDone

Data Table Name	Data Field Name
	MarkedDoneDate
	MarkedDoneDateYear
	MarkedDoneDateMonth
	FromDate
	FromDateYear
	FromDateMonth
	ToDate
	ToDateYear
	ToDateMonth
	Cost
	Sale
	IntercompanySale
	ApprovalStatus
	BookingApprovalStatus
	ProgressStatus
TimeEntry	SequenceNumber
	JournalNumber
	TaskID
	Date
	DateYear
	DateMonth
	PostingDate
	PostingDateYear
	PostingDateMonth
	Hours

Data Table Name	Data Field Name
	MovedHours
	Billable
	Public
	Correction
	CorrectionJobID
	CorrectionNote
	CorrectionDate
	CorrectionDateyear
	CorrectionDateMonth
	CorrectionoriginalID
	CorrectionOriginalDate
	CorrectionOriginalDateYear
	CorrectionOriginalDateMonth
	ApprovalStatus
	HasApprovedResourceInitials
	HasApprovedNotResourceInitials
	TarriffAdditionalPercentageCost
	TarriffAdditionalPercentageSale
	TarriffAdditionalPercentageIntercompanySale
	Cost
	Sale
	IntercompanySale
	EmployeeName
	EmployeeInitials
	EmployeeFullName

Finance Data Model

This single data model supports both the Finance Single Year and Finance All Years dashboards.



Data Table Name	Data Field Name
Activity	ID
	ShortName
	Description
	Fullname
	Active
	ExternalReference
Budget	Amount

Data Table Name	Data Field Name
	FromDate
Client	ID
	Name
	Initials
	Fullname
	Active
	Anonymised
	Type
ClientGroup	Title
Company	ID
	Name
	Initials
	FullName
	Currency
	CurrencySymbol
	AccountTyoe
	Active
	PublicRegistrationNumber
	ExternalRefernceNumber
	ExternalReferenceCode
	EquityAccountID
	EIN
Creditor	ID
	CreditorAccountNumber
	CreditorAccountName

Data Table Name	Data Field Name
	Blocked
	PublicRegistrationNumber
	EAN
	CreditorIsAnEmployee
	PaymentGroupID
	Internal
	ExternalReference
	CreditorPosting
CurrencyRate	Currencytable
	SourceCurrencyname
	SourceCurrencyISOCode
	TargetCurrencyName
	TargetCurrencyISOCode
	FromDate
	ToDate
	Factor
	Rate
Debtor	ID
	DebtorAccountNumber
	DebtorAccountname
	Blocked
	PublicRegistrationNumber
	EAN
	PaymentGroupID
	Internal

Data Table Name	Data Field Name
	ExternalRefernce
	DebtorPosting
Dim_Dates	Date
FinanceAccount	AccountNumber
	AccountDescription
	AccountType
	Blocked
	Externalrefernce
	Equity
FinanceJournalEntry	JournalNumber
	PostingDate
	PostingDateYear
	PostingDateMonth
	VoucherNumber
	VoucherDate
	VoucherDateYear
	VoucherDateMonth
	RegistrationDate
	RegistrationDateYear
	RegistrationDateMonth
	AccountNumber
	OffsetAccountNumber
	PostingText
	VATAmount
	Booked

Data Table Name	Data Field Name
	JobID
FinancePeriod	FinanceperiodNumber
	FromDate
	FromDateYear
	FromDateMonth
	ToDate
	ToDateYear
	ToDateMonth
FinanceYear	FinanceyearName
	FromDate
	FromDateyear
	FromDateMonth
	ToDate
	ToDateYear
	ToDateMonth
	FinanceYearNumber
FinancePosting	VoucherNumber
	JournalNumber
	PostingDate
	PostingDateYear
	PostingDateMonth
	VoucherDate
	VoucherDateYear
	VoucherDateMonth
	RegistrationDate

Data Table Name	Data Field Name
	RegistrationDateYear
	RegistrationDateMonth
	Amount
	Text
	ReferenceType
	ReferenceTypeDescription
	ReferenceSubType
	ReferenceSubTypeDescription
	JobID
	YearOnYearDate
FinanceAccountTypeSummationReferenceList	AccountNumber
	AccountDescription
	PostingAccountType
	PostingAccountNumber
	PostingAccountDescription
	PostingLineNumber
	SummationLineNumberFrom
	SumLineNumberTo
FinancialPartnerTransaction	TransactionDate
	TransactionDateYear
	TransactionDateMonth
	VoucherNumber
	OriginalAmount
	PostingDate
	PostingDateYear

Data Table Name	Data Field Name
	PostingDateMonth
	TransactionType
	ExternalDocumentNumber
	Text
	RemainingAmount
	DeliveryFinancePartnerAccountID
	CurrencyRevaluationAdjustment
FinancialBudget	CalculationFactor
	DetailType
	Active
	FinancialPeriodID1
	FinancialPeriodID2
	FinancialPeriodID3
	FinancialPeriodID4
	FinancialPeriodID5
	FinancialPeriodID6
	FinancialPeriodID7
	FinancialPeriodID8
	FinancialPeriodID9
	FinancialPeriodID10
	FinancialPeriodID11
	FinancialPeriodID12
	FinancialPeriodID13
	FinancialPeriodID14
	FinancialPeriodID15

Data Table Name	Data Field Name
	FinancialPeriodID16
	FinancialPeriodID17
	FinancialPeriodID18
	FinancialPeriodID19
	FinancialPeriodID20
	FinancialPeriodID21
	FinancialPeriodID22
	FinancialPeriodID23
	FinancialPeriodID24
	Title
	ApprovalStatus

Available Widgets

You can add many types of widgets to dashboards. Each widget visualizes data differently. This enables the best analysis and insight of the filtered data. The following table briefly describes the available widgets and their use

Widget	Description / Use
Numeric Data	
Indicator	You can use indicator widgets to display one or two numeric values in a variety of options, such as a number, a gauge, or a ticker.
Charts with X and Y Axes	
Column Chart	You can use column charts in different business scenarios, especially for comparing items and comparing data over time. Column charts can include multiple values on both the X and Y axes, as well as breakdowns by categories displayed on the Y axis.
Bar Chart	You can use bar charts to compare many items. Bar charts typically present categories or items (descriptive data) displayed along the Y axis, with their values displayed on the X axis. You can also break up the values by another category or groups.
Line Chart	You can use line charts for various business cases, including comparing data over time, or comparing changes over the same period of time for more than one group or category.
Area Chart	Area charts are very similar to line charts, except that the areas under each line are filled with color, and you can display them as stacked. Area charts are best used for displaying absolute or relative (stacked) values over a time period.
Scatter Chart	You can use scatter charts to display the distribution of two variables on an X axis, Y axis, and two additional dimensions of data (represented by color and size of the data points) that are shown as circles scattered across the chart.
Representing Proportions	
Pie Chart	You can use pie charts to display proportional data, and/or percentages.
Sunburst	You can use sunburst charts to visualize relationships within hierarchical data through a series of concentric rings, where each ring corresponds to a level in the hierarchy. Each ring can have multiple segments, with each segment showing the contribution of a particular dimension in that hierarchy. Sunburst charts are most effective at showing how one ring is broken into its contributing pieces.
Treemap	You can use treemaps to display hierarchical data in the form of nested rectangles. Treemaps are multidimensional widgets.

Widget	Description / Use
Tabular Data and Grids	
Pivot	You can use pivot tables to quickly summarize and analyze large amounts of data into tabular form. Pivot tables often use multiple columns that represent categories and numeric summations of the underlying data.
Tab	You can use tabs to add tab headings to a dashboard to hide or unhide widgets on the dashboard based on which tab heading is selected.
Table	You can use tables to display broader views of your data, presenting raw and non-aggregated data in columns, with as many fields and metrics as needed.
Table with Aggregation	You can use aggregated tables to extend the functionality of tables by supporting aggregation across the whole table.
Text Narratives	
Text	You can use text narratives in many charts and graphs; this embedded option provides additional textual insight into the underlying data. This text is dynamic and is updated based on changed filters and data selections. Dashboard Users cannot edit this text; it is contextual based on the filtered data.
Geographical Data	
Area Map	You can use area maps to represent geographical data as polygons on a map.
Scatter Map	You can use scatter maps to visualize geographical data as data points on a map.
Other chart types	
Calendar Heatmap	You can use calendar heatmaps to visualize values over days in a calendar-like view, making it easy to identify patterns or anomalies.
Box and Whisker plot	You can use box and whisker plots to visually describe the distribution, variability, and center of a data set along an axis.
Polar Chart	You can use polar charts to compare multiple categories or variables with a spatial perspective in a radial chart.
Funnel Chart	You can use funnel charts to show stages in a process that are sequentially dependent. The funnel shape helps you to track the health or validity of any process.

Glossary

WorkBook Intelligence uses a range of data and naming concepts and terms. These are described in more detail in the following tables.

Naming Concepts and Terms

Term	Definition
Business Intelligence	A technology-driven approach to analyzing data and delivering actionable information that helps executives, managers, and workers to make informed business decisions. As part of the BI process, organizations collect data from internal IT systems and external sources, prepare it for analysis, run queries against the data, and create dashboards and visualizations to make analytics results available to business users for operational decision-making and strategic planning.
Dashboard	A user interface that organizes and presents information in a way that is easy to read, somewhat resembling an automobile's dashboard, but interactive. WorkBook provides a Dashboards module where a range of user-defined dashboards can be found. WorkBook Intelligence Dashboards are also located within this module, but use the iFrame functionality to show the various WorkBook Intelligence dashboards within the WorkBook application.
Dashboard Designers	Users who can create and edit dashboards because they have Designer licenses to WorkBook Intelligence.
Dashboard Users	Users who are consumers of WorkBook Intelligence dashboards.
iFrame	(Inline Frame) An HTML element that loads another HTML page within the document. WorkBook Intelligence dashboards are displayed within iFrames.
Layout Mode	The dashboard mode that enables you to add widgets and rearrange them on a dashboard. You can tell that a dashboard is in Layout mode because the icon appears in the upper-right corner of the dashboard. Click this icon to change to the other dashboard mode, View mode.
Treemap	A visual method for displaying hierarchical data. A treemap uses nested rectangles to represent the branches of a tree diagram.
View Mode	The dashboard mode that enables you only to view a dashboard. Even if you are a Designer, you cannot rearrange or edit a dashboard when it is in View mode. You can tell that a dashboard is in View mode because the icon appears in the upper-right corner of the dashboard. Click this icon to change to the other dashboard mode, Layout mode.

Term	Definition
Visualization	The translation of information into a visual context—such as charts or graphs, numeric indicators, or text elements—to make data easier for the human brain to understand and pull insights from. The main goal of a visualization is to make it easier to identify patterns, trends, and outliers in large data sets.
Widget	An element of a graphical user interface that displays information or provides a specific way for users to interact with an application or system. On WorkBook Intelligence dashboards, widgets include bar charts, pie charts, text narratives, and many other displays. See Widgets for more detailed information about widgets.

About Deltek

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