



Designing Pervasive Dashboards Using the Dashboard Designer

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Prerequisites

- You have installed Microsoft Internet Explorer 9.0 or later.
- You have permissions for the query manager. To set authorizations for the query manager to users, from the SAP Business One, version for SAP HANA **Main Menu**, choose **Administration** **>** **System Initialization** **>** **Authorizations** **>** **General Authorizations** **>**. In the **Authorizations** window, select the user for whom you want to set authorizations, and select **Full Authorization** in **Query Manager** under **Reports**.

Procedure

1. In the SAP Business One, version for SAP HANA toolbar, choose  (**Dashboard Designer**).

Note

Only users with authorizations for the query manager can access the window.

The **Dashboard Designer** window appears. The **Select Base Data Source** section displays the following:

- All the system and customized **SELECT** queries that do not contain any parameters and for which you have permissions.
- All the deployed analytic and calculation views in the SAP HANA database.

Note

To grant the query authorization to users, from the SAP Business One, version for SAP HANA **Main Menu**, choose **Administration** **>** **System Initialization** **>** **Authorizations** **>** **General Authorizations** **>**. In the **Authorizations** window, select the user to whom you want to grant the authorization, and in **<query group>** under **Query Generator** under **Reports**, select **Full Authorization**.

Note

If a specific **SELECT** query does not contain any parameters, and is currently open from the query manager, the **Dashboard Designer** window appears with this query selected.

If a specific window is open with a sidebar, the **Dashboard Designer** window appears with the dashboard that is currently displayed in the sidebar.

2. In the **Select Base Data Source** section, select the query or view based on which you want to design a pervasive dashboard. The right side of the window displays the details and up to 20 results.



[Optional] If you select a query, to open the query, choose the **Edit Query** button.

3. Choose the **OK** button or click the **Design Dashboard** link.

If you selected a query, the **Measures** area displays numerical columns of the query, and the **Dimensions** area displays non-numerical columns of the query.

If you selected a view, the **Measures** area displays the measures and calculated measures of analytic views, or measures of calculation views, and the **Dimensions** area displays the attributes of views.

4. In the **Design Dashboard** section, drag required columns to the target areas to design your own dashboard. During your design, the dashboard on the right displays real-time results.

[Optional] You can change chart types using the **Chart Type** dropdown list, and change the dashboard view to the query result view using the  and  icons.

Caution

Pie chart does not support multiple dimensions.

[Optional] You can use the **Forecast** strategy to display forecasts based on your current data. For more information, see [Using the Forecast Strategy](#).

- For target measures, you can perform the following:
 - Select calculation methods for the measures: **Sum**, **Average**, or **Original**.
 - Sort the data of the measures: ascending or descending.
 - Change the legend name in the dashboard. To do this, choose the **Name Customization** button, enter the name, and choose the **Save Customization** button.
 - Drag measures up and down to change their display order.
 - For target dimensions, you can perform the following:
 - Set the number of top values from 5 to 30 using the **Limit to Top** bar.
 - Drag dimensions up and down to change their display order.
 - For dimensions of time type, select the time unit to display in the dashboard.
 - For filters, you can perform the following:
 - Drag dimensions to the filter section, and select filtering values in the **Filter Editor** window.
 - Delete the filter by double-clicking it and choose the **Delete** button.
 - Add customized values as active filters. To do this, enter a customized value in the **Add Value** field of the **Filter Editor** window, and choose the **Add Value** button.
5. To save the dashboard, choose the **Save** button; to save the dashboard as a new one, if you opened an existing dashboard, choose the **Save As** button.
 6. [Optional] In the **Add Links** section, choose the **Add Links** button to add links of the dimensions to the fields of a window. To add links to more windows, choose the **Add Links** button again. The number of linked windows appears in the upper-right corner. A link builds a connection between the field and a dimension. To display the dashboard as a sidebar beside the linked window, see [Viewing Linked Pervasive Dashboards in Sidebars](#).

Example

The dashboard displays the quantities of the best sold products to the company's customers. You link the customer dimension in the dashboard to the business partner name in the **Business Partner Master Data** window. When navigating to a specific business partner in the **Business Partner Master Data** window, in the sidebar you can see the quantities of the best sold products to this business partner.

i Note

SAP Business One, version for SAP HANA supports 12 windows. To add, delete, or modify the fields to which you can add links, see Step 3 in [Managing Pervasive Dashboards](#).

For each window, the first 10 fields in the **b1PANAConfig.xml** file are displayed. To view more, choose the **Show More** link. For more information about the **b1PANAConfig.xml** file, see Step 3 in [Managing Pervasive Dashboards](#).

7. To save the linking setting, choose the **Finish** button. You can choose the **Dashboard Manager** button to open the **Dashboard Manager** window, or the **Design New Dashboards** button to go to the **Select Base Data Source** section.