Charts

Introduction

This Quick guide will show you how to Add and edit charts in the dashboard. The data that needs to be filled in is; period, data and filter. In the end you have setup a chart in dashboard.

Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

On the last page it is described how to set up the Security to activate, view and edit the described tool.

The guide *may* contain important general notices. These will be marked with an exclamation icon.

Tips and tricks are marked with an Info-icon.

Questions & Answers note relevant to the topic at hand.

Introduction

1 Add element

Open My dashboard in ribbon. A new tab opens.
Click "Edit layout" and choose "Add Element".
A window opens. Click "Charts".

This functions the same way in my dashboard as in shared dashboard and any report.

You should start experiment adding elements in My dashboard, and when you feel comfortable you can start setting up the Shared dashboard. In this way, the Shared dashboard will not be edited by several users.

2 Configure the chart

The chart can be set up with bars, splines or lines. The time period is on the x-axis and the y-axis shows the values of the chart.

You can set up your chart to different series to customers and/or products. This will be explained later in this guide.

3 Placing elements

When you have added elements you need to figure out where to place the element on the dashboard.

The first element you add will automatically fill the working area.

The second will appear in a pop-up window next to the cursor on the screen.

Click the element to move it. A docking assistant appears on the screen where you can dock the element in the appropriate position.
Drag the element to one of the five docking areas (highlighted in red) to dock the window in the middle of the screen. Each docking area indicates the position of the element after it has been docked. The area in blue indicates where the element will be docked.

If you place the element in the middle docking area of an existing element (second picture), the window will be placed in another tab than the first one. This creates different tabs in the bottom of the first tab (third picture).

The docking area in the outer edges (fourth picture) of the tab places the element in the outer edges. If you place the element in the bottom of the tab, and then remove the first element, the second element will remain in the bottom of the tab.

4 Save layout

Click Close edit layout in the ribbon to save your new layout.

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Configuration
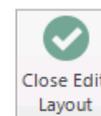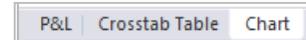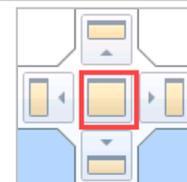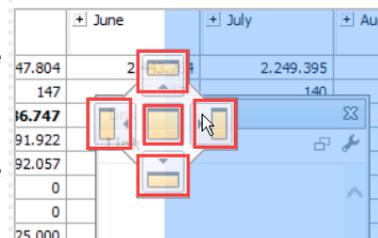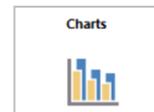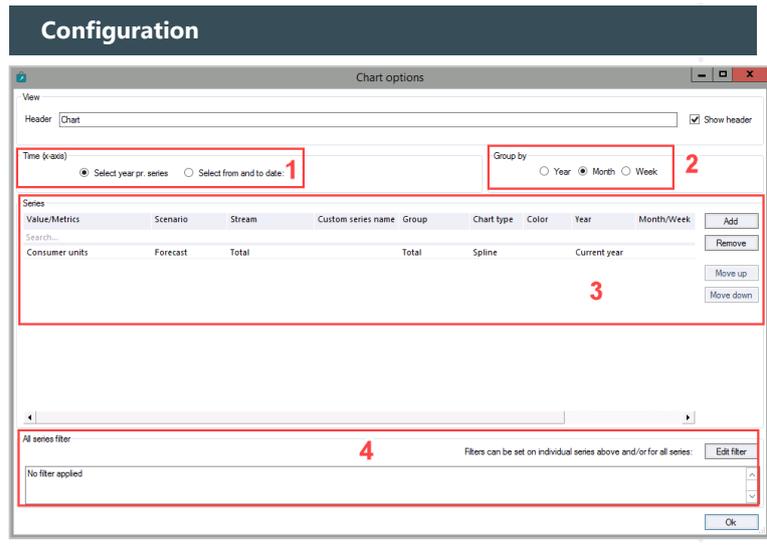
Above you see the window that appears when you add a chart. Here is a description of different market points.

1. Select whether you want the chart to be displayed for a year or if you want it within a specific time period, where you can select the dates.
2. Select how you want the period displayed: by year, month or week in the chart.
3. Here you add your series and configure the values of the series.
   - Value/metrics: The value/calculation method you want in your chart. E.g. units, P&L lines, average prices etc.
   - Scenario: The scenario you want.
   - Stream: The stream you want to create a chart for.
   - Custom series name: Here you can enter a name for the column for easy reference.
   - Group: Select the hierarchy of customer, product or any other group you want for your series.
   - Chart type: Select the type of chart you want.
   - Color: Select the color of the line within the chart you want.
   - Year: The year the values for the charts should be displayed.
   - Month/Week: The month/week the chart should be displayed.
   - Filter: Here you can apply a filter to the series.
4. In this section you can add or remove filters of the chart.

Setup chart

On the following page you see a simple chart. It consists of:
- A bar for actual net sales last year (Blue bar).
- A bar for actual net sales current year (Green bar).
- A spline for actual year-to-date and a forecast for year-to-go (Red spline).

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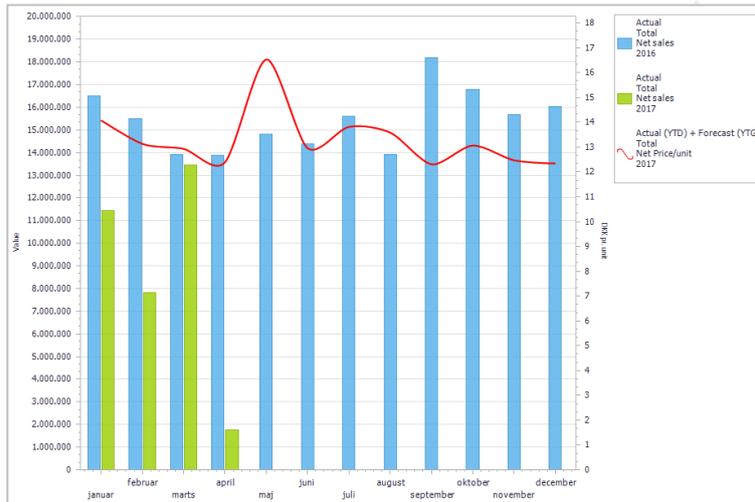
1 Select Time

Select how the chart should be displayed (Configure 1).
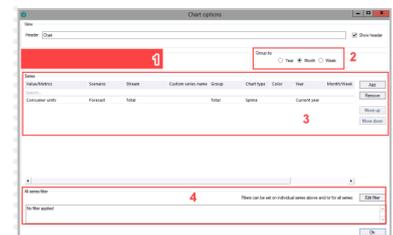
2 Select grouping

Select how to group the information in your chart (Configure 2).
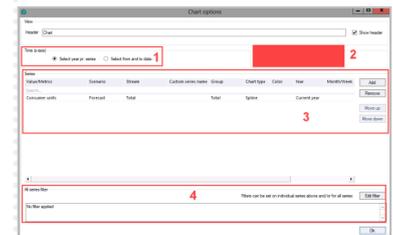
3 Add series

Click Add to the right to add series to the chart. You can add as many series as you want. (Configure 3).
Now you can enter information into the different lines of the series.

Here the following fields are filled out:
- Value/metrics
- Scenario
- Stream
- Group
- Chart type
- Color
- Year
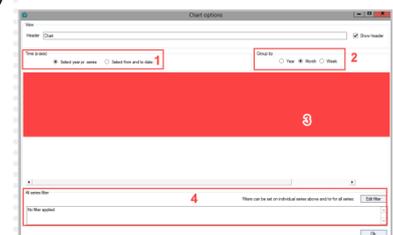
Click Ok when you are done.

Here is a picture of what we have entered into the configuration window to get the chart above.

Value/Metrics	Scenario	Stream	Custom series name	Group	Chart type	Color	Year	Month/Week	Filter
Search…									
Net sales	Actual	Total		Total	Bar		Last year		No filter applied
Net sales	Actual	Total		Total	Bar		Current year		No filter applied
Net Price/unit	Actual (YTD) + Forecast (YTG)	Total		Total	Spline		Current year		No filter applied

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Add filter

1 Edit filter

You can add or remove filters for the chart.
Click *Edit filter* to add or remove a filter.
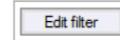
2 Select filter

Select the customer or product hierarchy you want to filter in your chart in the menu to the left.
Check the customers/products you want to hide.
Click Ok to apply filter.

Other options

(i) Remove series

To remove series, click *Remove* in the right side of the configuration window.

Security - User Roles

For a user to view and edit the Reports in the system, access needs to be granted from *Security settings* by a super-user/admin.

(i) Security

From **"File"** select **"Security"** and the window with all the users in the system and the roles assigned to each one will open. Select a role to open the corresponding settings.
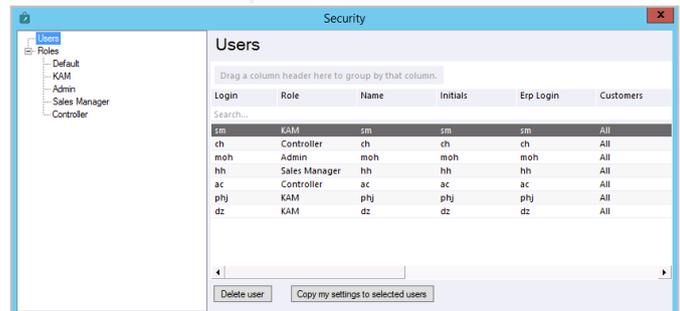
(i) Allow View & Edit Reports

Check mark the boxes to allow the role to view and edit:

Standard reports - mark **"System"** to allow working with standard BMS reports.

Company reports - mark **"Access report folder"** to allow access to the corresponding folder with company specific reports.

User reports - mark **"Allow user reports"** to allow user to build private reports.

Edit dashboard - mark **"Frontpage", "User dashboards"** and **"Company dashboards"** to allow access to the corresponding dashboards.

Report Packs - mark **"Manage Report Packs"** and **"Access Reports Packs"** to allow view and edit of the report packs.

Company dashboards - mark the **"Report folder X"** to allow access to the corresponding report folders.
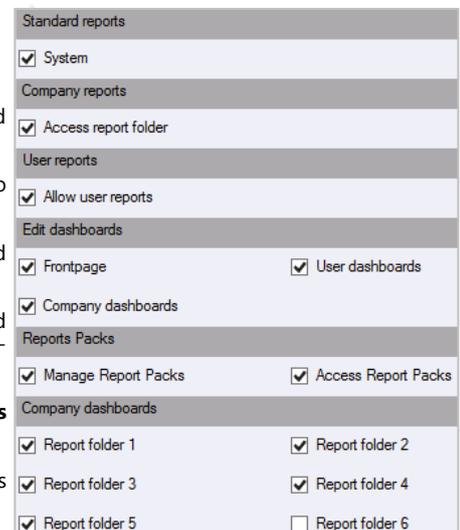
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How do I create a graph for a specific time period?

Create two series. In Time, click Select from and to date and select dates in the drop-down lists.

How do I compare two years?

Create two series and select different years for both of them. E.g. Last year vs. Current year as this guide has described.

Can I add both a value and a metrics for a series?

Values and metrics are collected when creating series in charts. In Value/ Metrics you can select either values, metrics or a combination of the two as in the example in this guide, Net price per unit.