efi PrintStream

User Guide

Dashboard
V21.1.0200

EFI PrintStream | *V21.1.0200 Dashboard User Guide*

Patents

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

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Table of Contents

Introduction

Overview

Welcome to EFI PrintStream. The Dashboard module is an add-on product which allows you to build SQL queries that can be used to generate a Chart, Gauge, or Pivot type of report. You can create a customized Dashboard menu, adding reports and dynamic panels. You can also control access to these features on a plant and user level.

This guide will show you how to use the Dashboard module which includes using queries and creating reports. Please contact your EFI Sales Representative for more information on how to purchase and set up PrintStream Dashboard.

Note This guide assumes the user is familiar with creating SQL queries.

Contact Information

EFI Support

Web Site	https://customer.efi.com/support
US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
E-mail:	printstream.support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

Dashboard

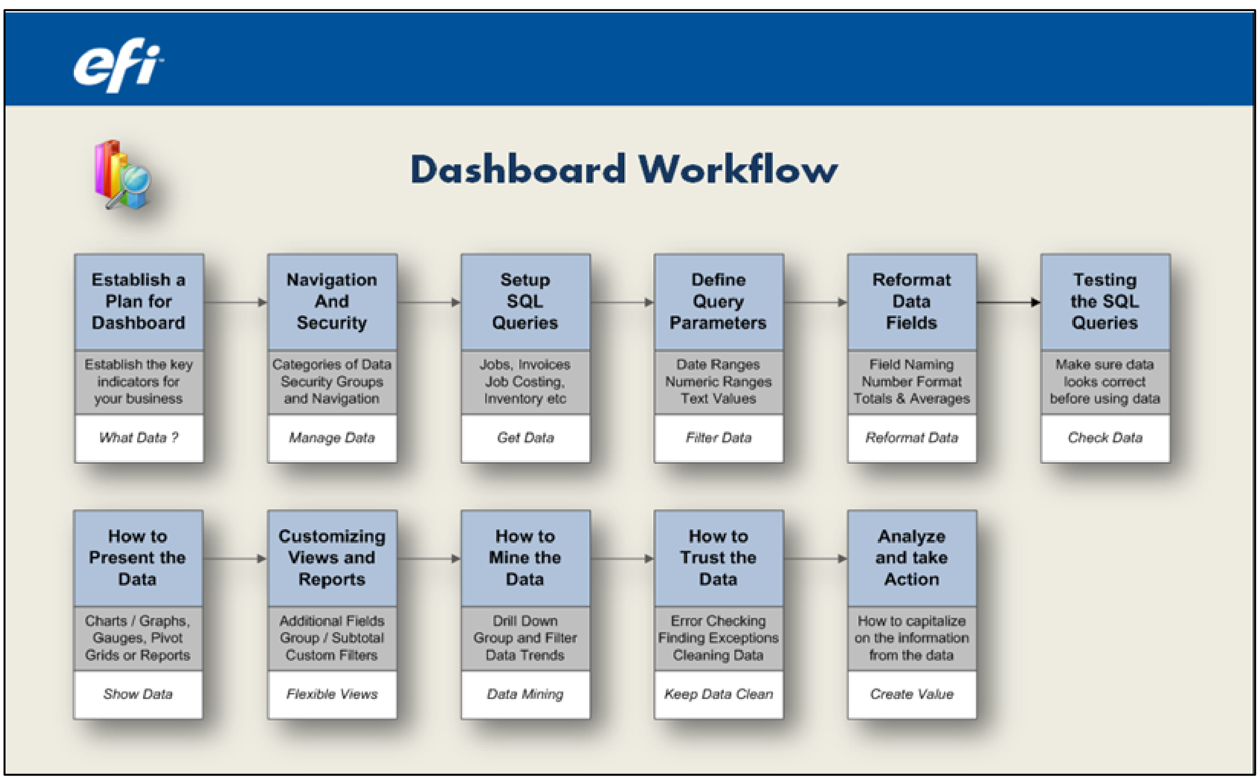
Dashboard is a powerful tool for obtaining and analyzing the data you are collecting. Before you can start to create queries for reports you should determine how and why you will use Dashboard. You can use Dashboard to measure and analyze the following areas of your business:

- **Jobs Created** – to manage pipeline and CSR and production workload
- **Invoiced Sales** – to understand projected sales and Top 10 customers etc.
- **Shop-Floor Transactions** – to analyze productivity and rework or spoilage
- **Inventory Transactions** – to manage warehouse space and re-ordering
- **Jobs In Progress** – to manage On Time delivery and Production priorities
- **Purchase Orders** – to manage cash requirements and pending expenses
- **Job Costing Transactions –** to analyze run speeds & employee performance
- **Fulfillment Order Data** – to understand Orders, Releases, Shipments and more
- **Estimates Created** – to analyze quoting activity and pending opportunities

Dashboard Workflow

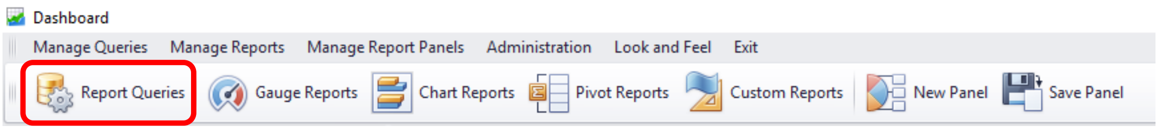
The following workflow was designed to help you get the most out of the Dashboard. This guide can help you with the details of how to use Dashboard, you must put in the proper preparation before you build that first query.

Note Please contact your EFI Representative for the *Dashboard Overview* PowerPoint presentation. This presentation details how to identify your business needs to best use Dashboard in your plant.



Report Queries

To extract the data you need, you must create SQL Queries. These Queries are used to create reports where you can analyze the data. To begin working with Queries select the **Report Queries** icon as shown below.



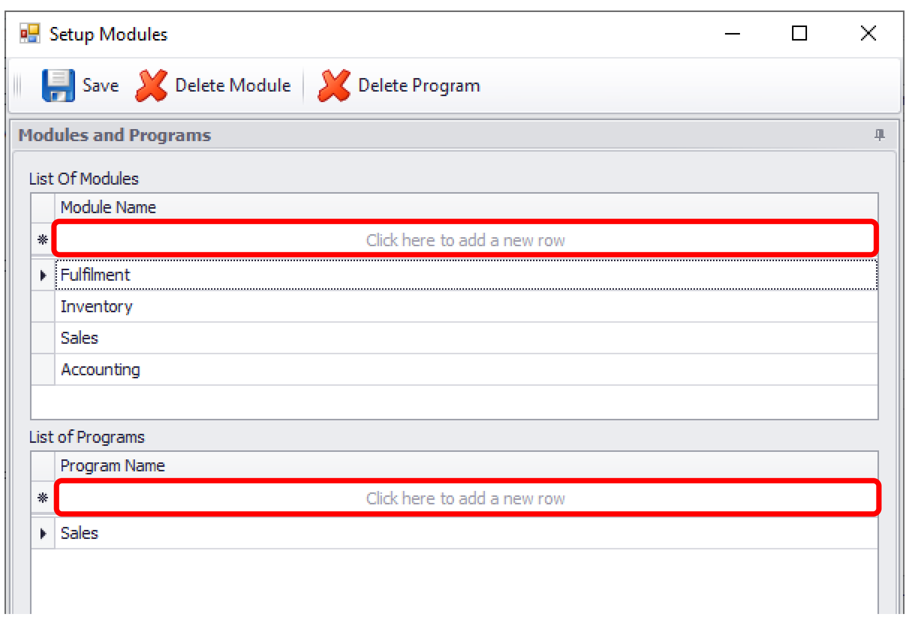
Organizing Queries

Before you begin to add queries to the list, you should first think about how to keep your queries organized. As the library grows it will be important to maintain some organization of all queries. **Modules** are the first level of how you will organize your queries. For example, Estimating, Jobs, Inventory, etc. **Programs** are a sub-category of a Module and are defined within the Module. For example, under a Jobs module you may have programs for Bookings, Jobs in Progress, Shipments, etc.

Select the **Setup Modules** icon to define modules and program groups. As you create queries you will be able to assign them to program and module groupings.

To create a Module or Program

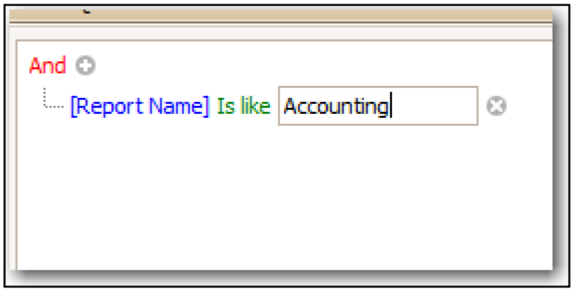
1. Select the **Setup Modules** icon.
2. Under **Module Name**, click in the upper row and enter a name. Under **Program Name**, click in the upper row and enter a name.



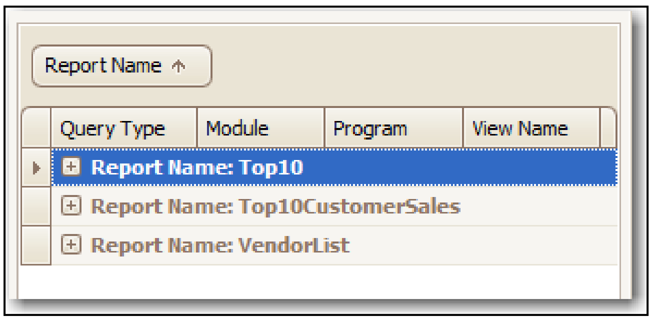
3. Click **Save**.

Searching for Queries

In addition to having two levels for grouping and organizing queries, there is also a search function available from the query screen.

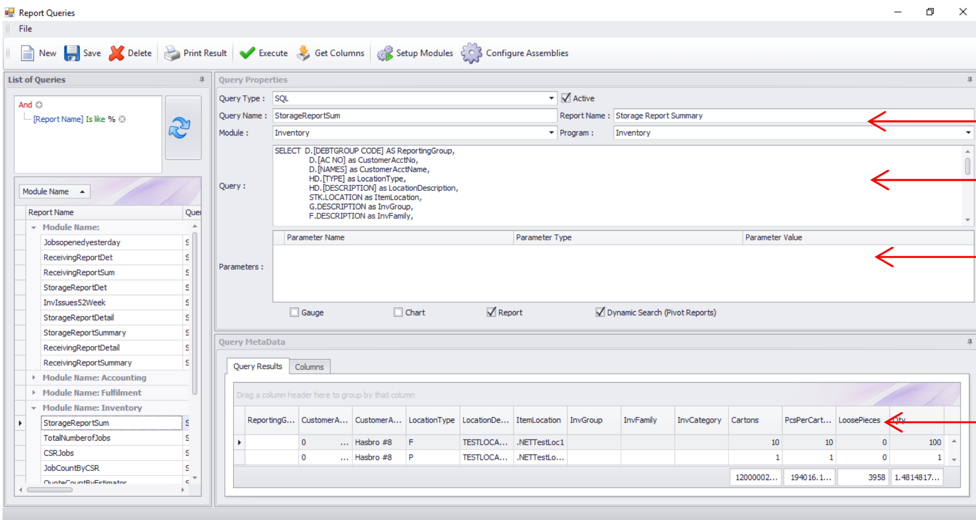


You can sort the results by column. Simply click and drag any of the column titles to the header to group by that area. This can also be done with multiple levels; groups and sub groups.



Adding a New Query

In the Report Queries window of Dashboard is where you will design your queries. Typically, users build SQL queries in the SQL database and then cut and paste them into Dashboard here.



Add name and description and categorization.

Enter the SQL query.

Chose parameters.

Columns retrieved by the Query are shown in the Columns tab.

To add a query

1. From the Query window click **New**.
2. In the Query Properties window enter the following:

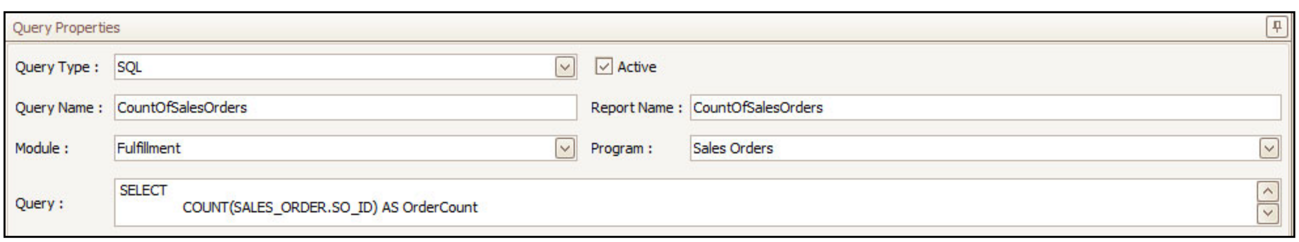
   Query Type: SQL

   Query Name: Enter a text name. Cannot contain spaces or special characters.

   Report Name: This name will display in Dashboard for this query.

   Model / Program *(optional)*: Select a Module and/or Program to categorize the query.

   Query: Enter the SQL query. You can also cut and paste an existing SQL query into this field.

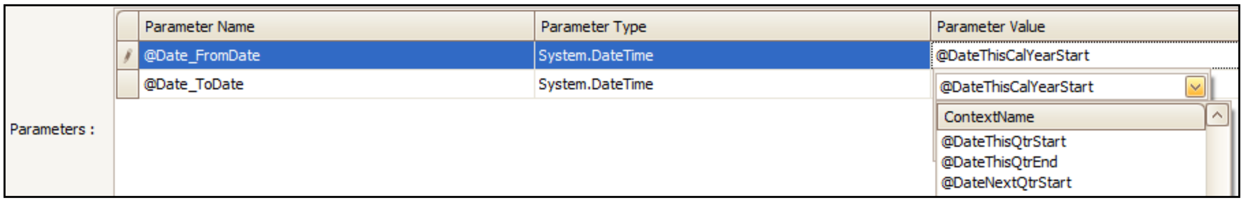


3. Click **Save**.

Query Parameters

Configure query parameters into the SQL Query to reduce the number of rows retrieved By adding parameters in the WHERE clause of the SQL Query in a specific way you can significantly reduce the number of rows of data that the query needs to retrieve as well as provide the ability for a user to change these parameters when running a report.

Parameters can be set to default to specific values for each time the query runs. Select from the **Parameter Value** drop-down list.



Parameter Syntax

There are the three standard syntax choices for parameters used in SQL Queries:

Dates – Use when the query should only return rows where a date in the specified database field is greater than or equal to @Date_From

- Parameters must begin with the following characters: "@Date_"

Numbers – Use when the query should only return rows where a numeric value in the specified database field is less than @Numeric_MaxUsageQty

- Parameters must begin with the following characters: "@Numeric_"

Text Values – Use when the query should only return rows where the text value in the specified database field contains a value like @String_ShipStatus

- Parameters must begin with the following characters: "@String_"

Working with Date controls

Dashboard provides a list of pre-defined constants for dates which can only be used in the 'where' clause of the Report Query for the date field. Below is the list of defined constants for Date fields, which can be used in queries and will replace the constant with the actual values, while executing the report against it.

The first column lists the predefined constant. The second column displays the value which will be replaced when the query is executed.

For example, if you select today's date (today being 1/1/2016) from the calendar control, the query will always run against the 1/1/2016 date. However, if you select @DateToday from the predefined constants, the query will always run on the current date of when you run the query – not a fixed date. So if you use @DateToday on 1/2/2016 the data will be for 1/2/2016 automatically. You do not have to update the calendar control.

Constant	Value that will be replaced dynamically.
@DateToday	Today's Date
@DateYesterday	Date on Yesterday
@DateTomorrow	Tomorrows Date
@DateThisMonday	Monday of current week. (Specific Date this week based on day of week)
@DateThisTuseday	Tuesday of current week. (Specific Date this week based on day of week) etc.
@DateNextMonday	Monday of Next week. (Specific Date next week based on day of week)
@DateNextTuseday	Tuesday of Next week. (Specific Date next week based on day of week) etc.
@DatePrevMonday	Monday of previous week. (Specific Date previous week based on day of week)
@DatePrevTuseday	Tuesday of previous week. (Specific Date previous week based on day of week) etc.
@DateThisCalMonthStart	Start date of this Calendar Month

Constant	Value that will be replaced dynamically.
@DateThisCalMonthEnd	End date of this Calendar Month
@DateNextCalMonthStart	Start date of Next Calendar Month
@DateNextCalMonthEnd	End date of Next Calendar Month
@DatePrevCalMonthStart	Start date of Previous Calendar Month
@DatePrevCalMonthEnd	End date of Previous Calendar Month
@DateThisFinMonthStart	Start date of This Financial Month
@DateThisFinMonthEnd	End date of This Financial Month
@DateNextFinMonthStart	Start date of Next Financial Month
@DateNextFinMonthEnd	End date of Next Financial Month
@DatePrevFinMonthStart	Start date of Previous Financial Month
@DatePrevFinMonthEnd	End date of Previous Financial Month
@DateThisQtrStart	Start date of this Calendar Quarter
@DateThisQtrEnd	End date of this Calendar Quarter
@DateNextQtrStart	Start date of Next Calendar Quarter
@DateNextQtrEnd	End date of Next Calendar Quarter
@DateLastQtrStart	Start date of Previous Calendar Quarter
@DateLastQtrEnd	End date of Previous Calendar Quarter
@DateThisCalYearStart	Start date of This Financial Quarter
@DateThisCalYearEnd	End date of This Financial Quarter
@DateNextCalYearStart	Start date of Next Financial Quarter
@DateNextCalYearEnd	End date of Next Financial Quarter
@DateLastCalYearStart	Start date of Previous Financial Quarter
@DateLastCalYearEnd	End date of Previous Financial Quarter
@DateThisCalYearStart	Start date of this Calendar Year
@DateThisCalYearEnd	End date of this Calendar Year
@DateNextCalYearStart	Start date of Next Calendar Year
@DateNextCalYearEnd	End date of Next Calendar Year
@DatePrevCalYearStart	Start date of Previous Calendar Year
@DatePrevCalYearEnd	End date of Previous Calendar Year
@DateThisFinYearStart	Start date of This Financial Year
@DateThisFinYearEnd	End date of This Financial Year
@DateNextFinYearStart	Start date of Next Financial Year
@DateNextFinYearEnd	End date of Next Financial Year
@DatePrevFinYearStart	Start date of Previous Financial Year
@DatePrevFinYearEnd	End date of Previous Financial Year

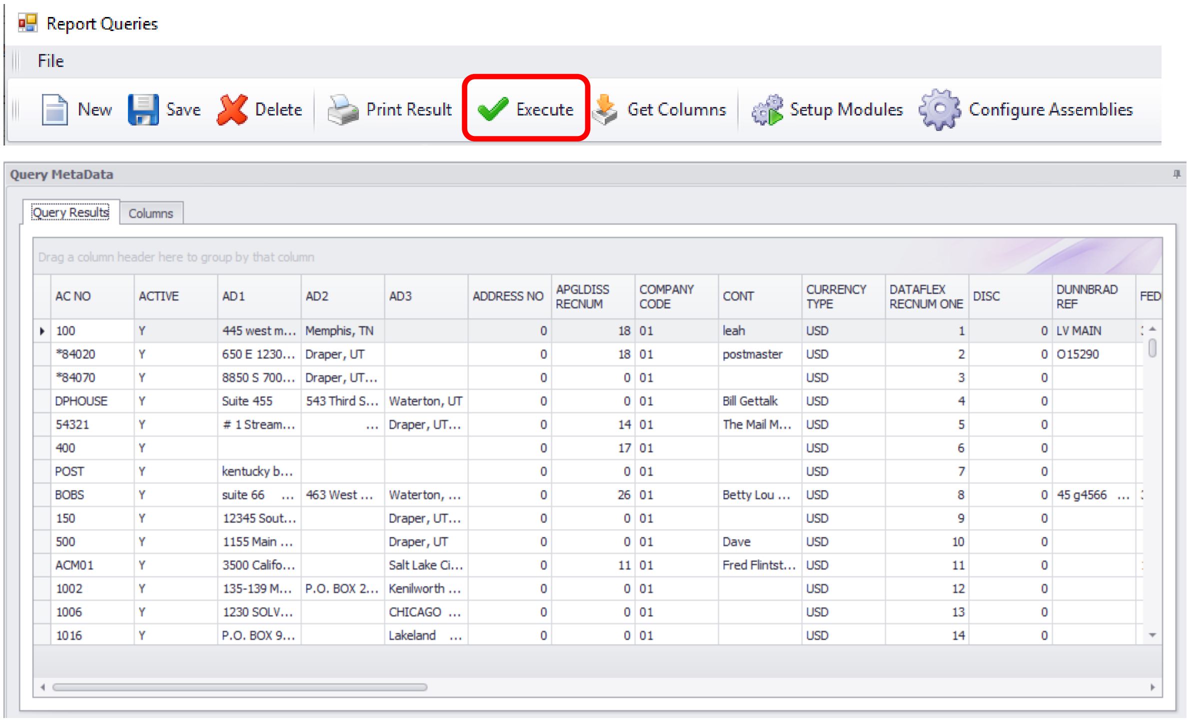
Defining How the Query Will Be Used

Select the boxes that apply; Gauge, Chart, Report, and/or Dynamic Search.

Note The Dynamic Search option is used with the Pivot Grid reports and allows for parameters to be selected at run time.

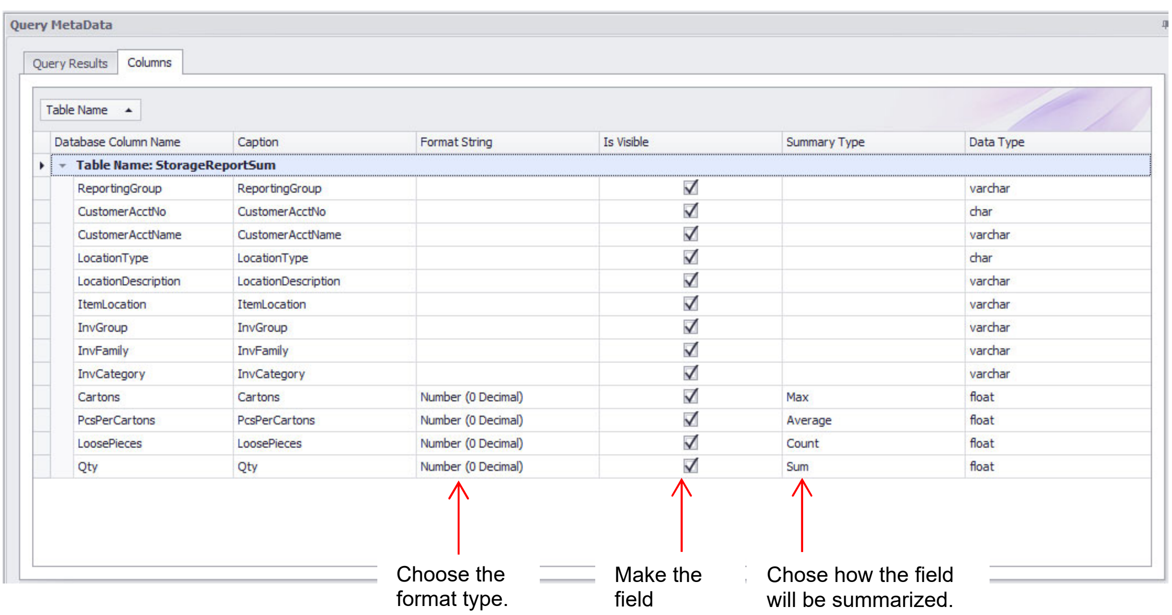
Query Results

You should test and review your query before using it to create charts or reports. Select the **Execute** (green check) icon to return the query results in the **Query Results** tab.



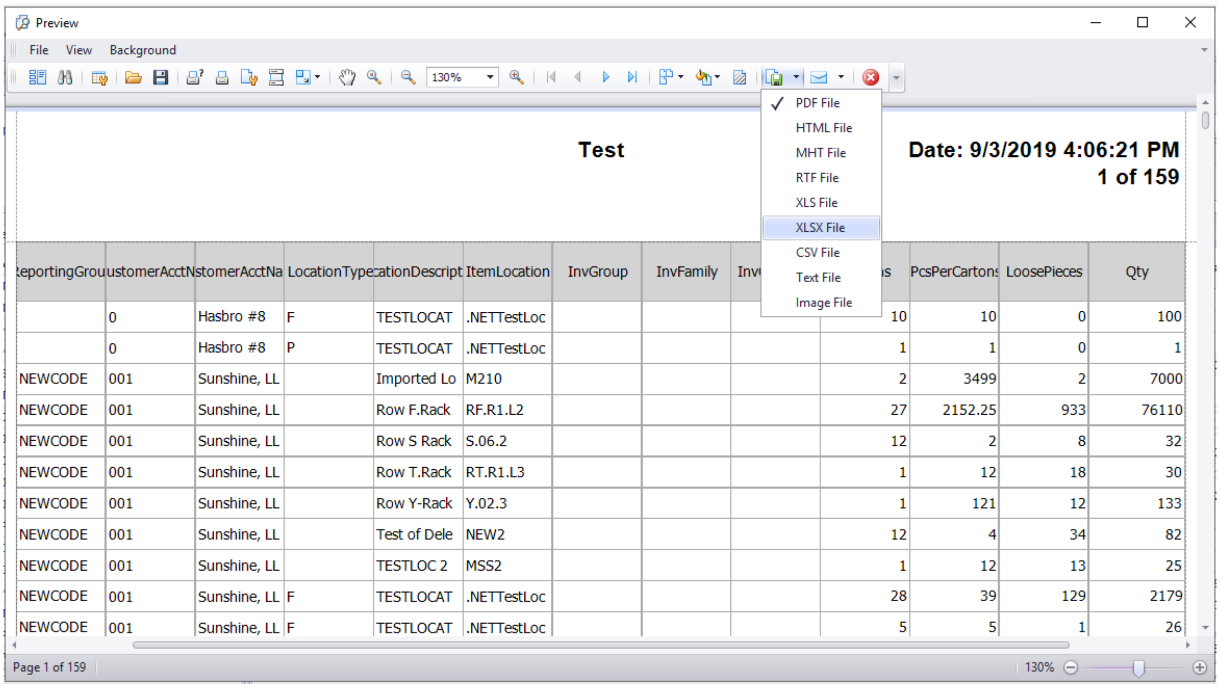
Refining Query Results

From the **Columns** tab you can perform additional filtering and manipulation. Each field within the table(s) in the main query will be displayed here.

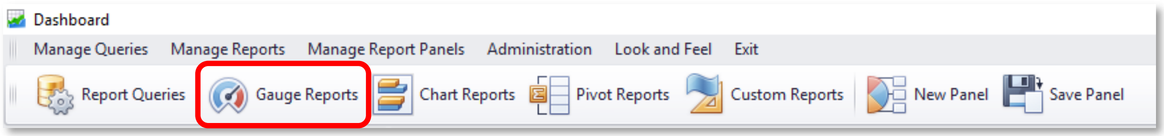


Export Results

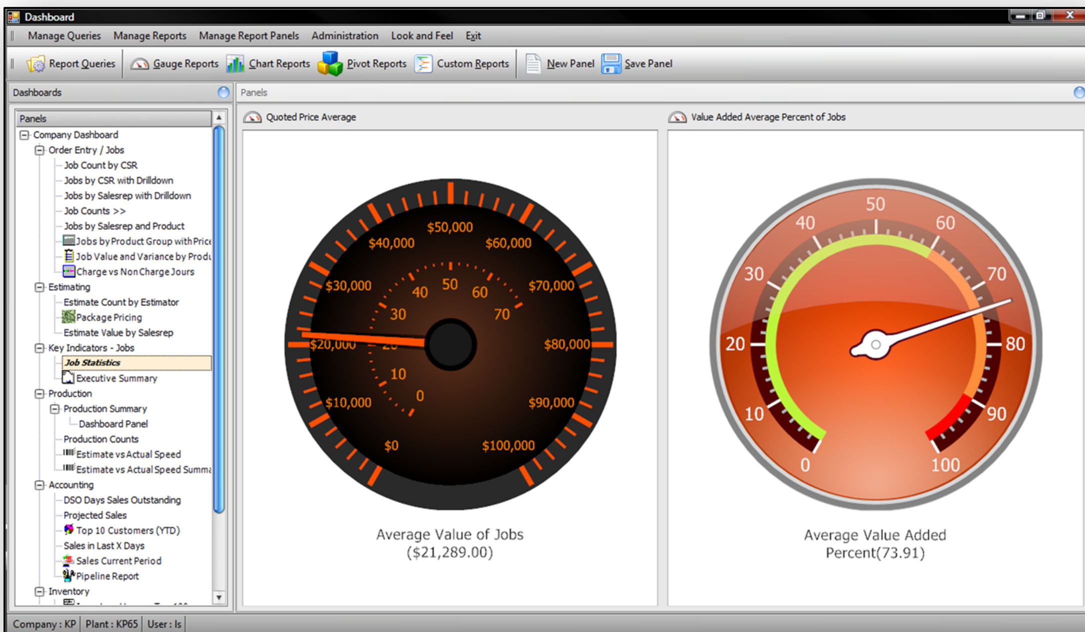
Select the **Print Results** icon to generate a report directly from the Query screen. Export the results into several different formats if you need to. You can then easily group and sort the data to create a simple report.



Gauge Reports



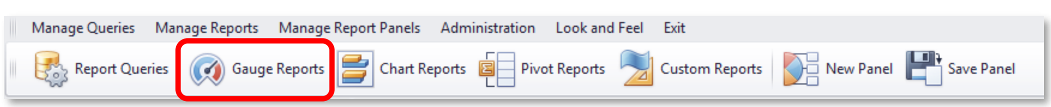
The best use of a gauge is to reflect a single point of information, like a total amount such as total invoices billed for the month. It is a very specific point of data you want to retrieve.



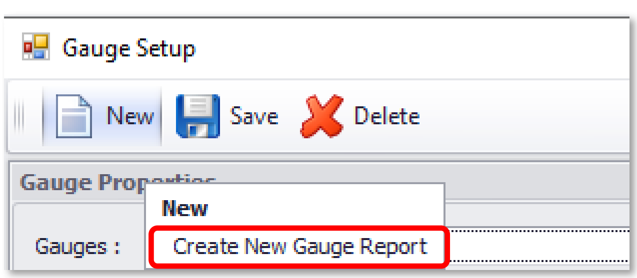
Creating a Gauge

To create a gauge

1. Select the **Gauge Reports** icon.



2. Click **New** and select **Create New Gauge Report**.



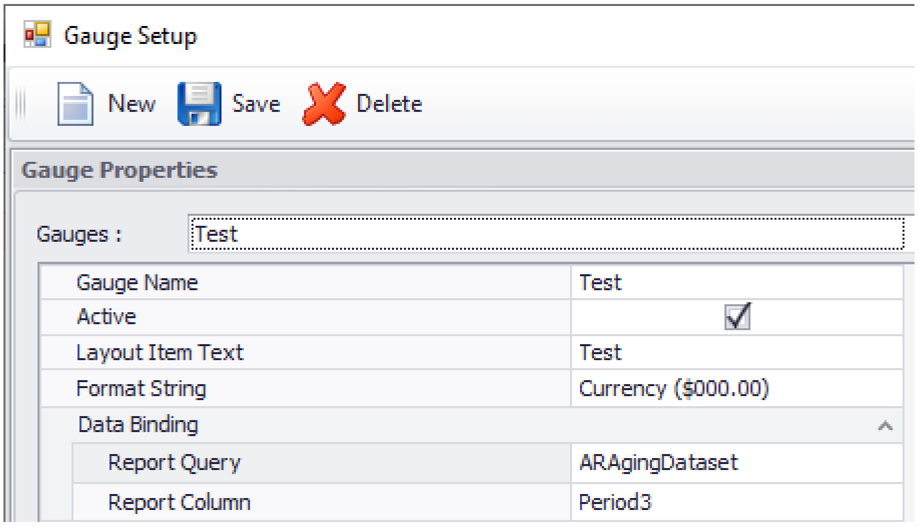
3. In the Gauge Properties window, enter the following:

   Gauge Name: Enter a descriptive name.

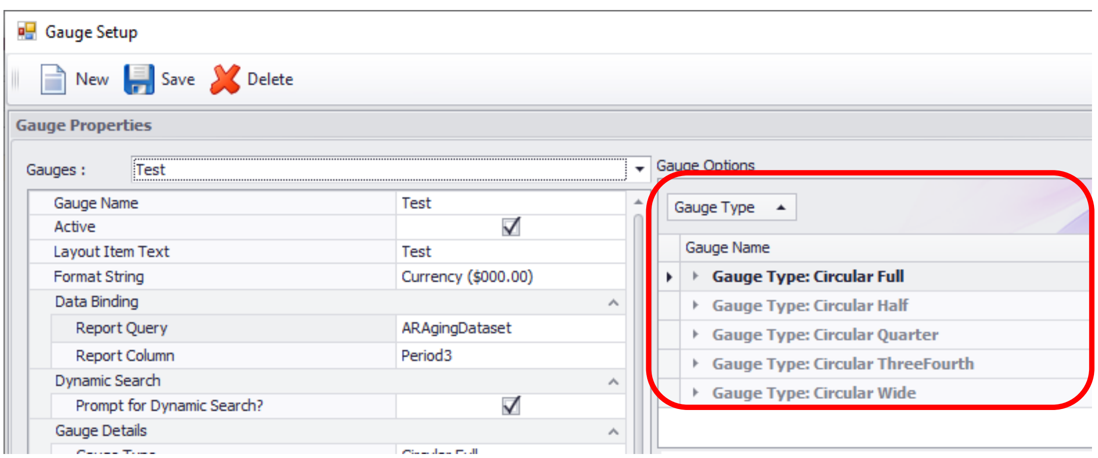
   Format String: Choose a format from the drop down list

   Report Query: Select the Report Query to be used in the Gauge.

   Report column: Select the Report Column option. The Report Column selection is the field within your query that will represent the value.



3. Select **Gauge Type** to choose the style color display for this gauge. There are five gauge shapes and nine color options to choose from within each shape option. As you click on each one, a visual representation of what the gauge will look like will be displayed.



4. Under Gauge Details define the Gauge **Display Name** and the **Gauge Label**. Defaults for **Maximum** and **Minimum** values for the outer scale as well as a scale factor are included but can be edited to suit personal preference. You can also define font size, tick count and text offset.

Gauge Details	
Gauge Type	Circular Full
Gauge Style	Clean White
Gauge Display Name	Test Guage Display NAme
Gauge Label	Test Guage Label
Outer Scale	
Maximum Value	100
Minimum Value	0
Scale Factor	1
Major Tick Mark	
Font Size	8
Tick Count	11
Text OffSet	-17
Minor TickCount	
Minor Tick Count	4
Inner Scale	
Maximum Value	100
Minimum Value	10
Expected Value	100
Major Tick Mark	
Tick Count	10

5. Click **Save**.

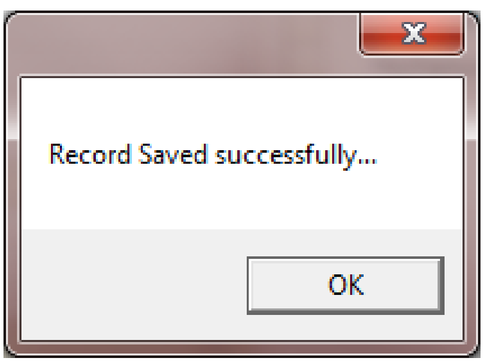


Chart Reports

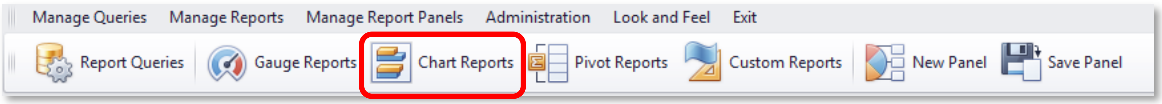
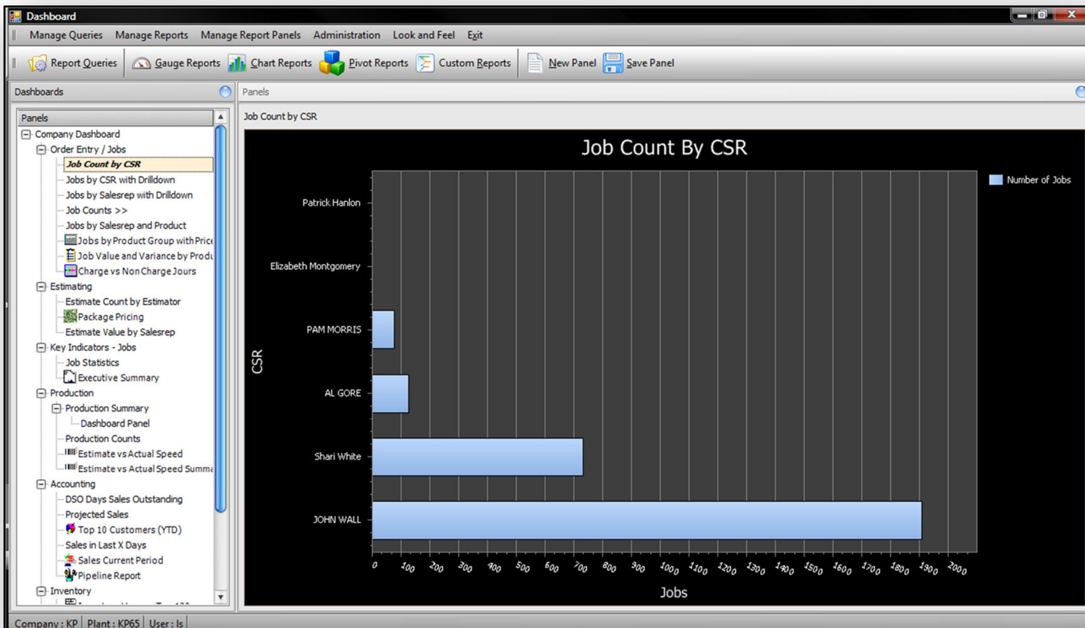


Chart Reports are used to display a graphical two dimensional array of information such as a graph of Total Sales for the month broken out by Sales Person. These can display as charts or graphs.

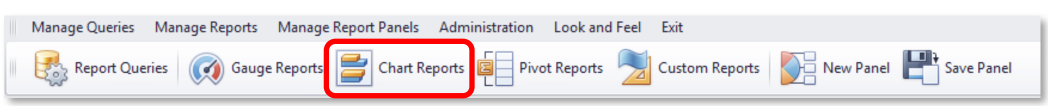


Create a Chart

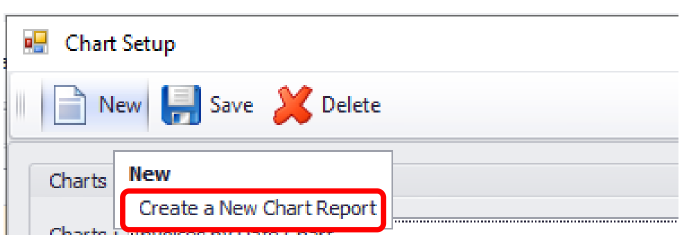
As you create your chart, the display on the right side of the Chart Setup window will reflect your choices.

To create a chart

1. Select the **Chart Reports** icon.



2. Click **New** and select **Create New Chart Report**.



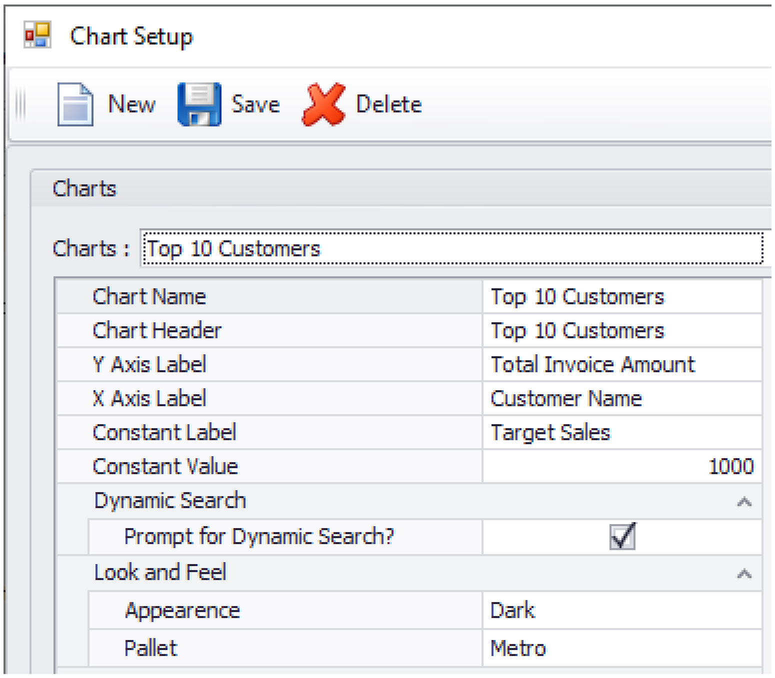
3. In the Chart Setup window, enter the information below.

   Chart Name: Enter a descriptive name for the name of this chart.

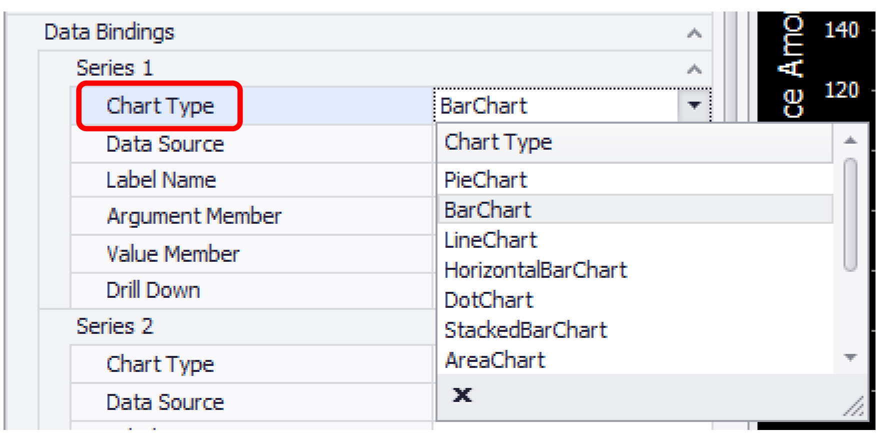
   Chart Header: Enter a descriptive title which will be displayed on the chart.

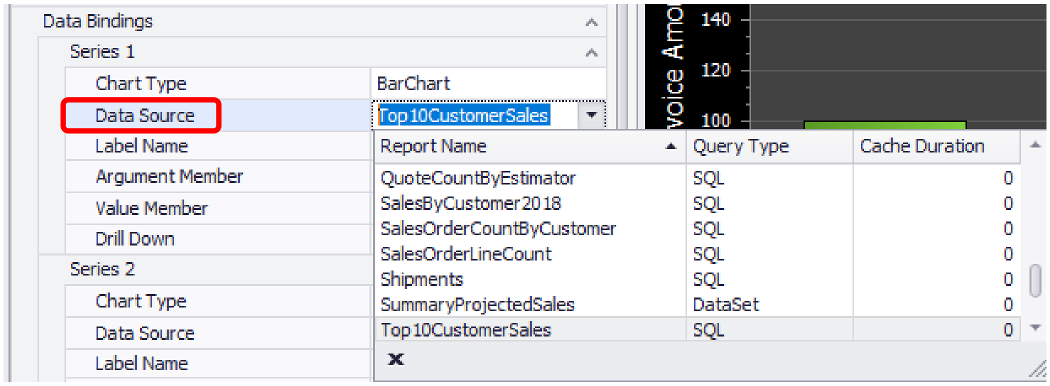
   Axis Labels: Enter descriptive labels for the charts axis lines.

   Look and Feel: In this section you can customize the chart display.

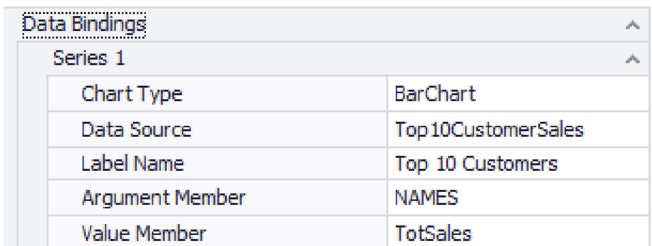


4.Under **Data Bindings** select a **Chart Type** and **Data Source**. The Data Source is an existing report.





5. Enter a **Label Name** and select an **Argument Member** and a **Value Member**. In the example below the data displayed will be YTD sales by Month.

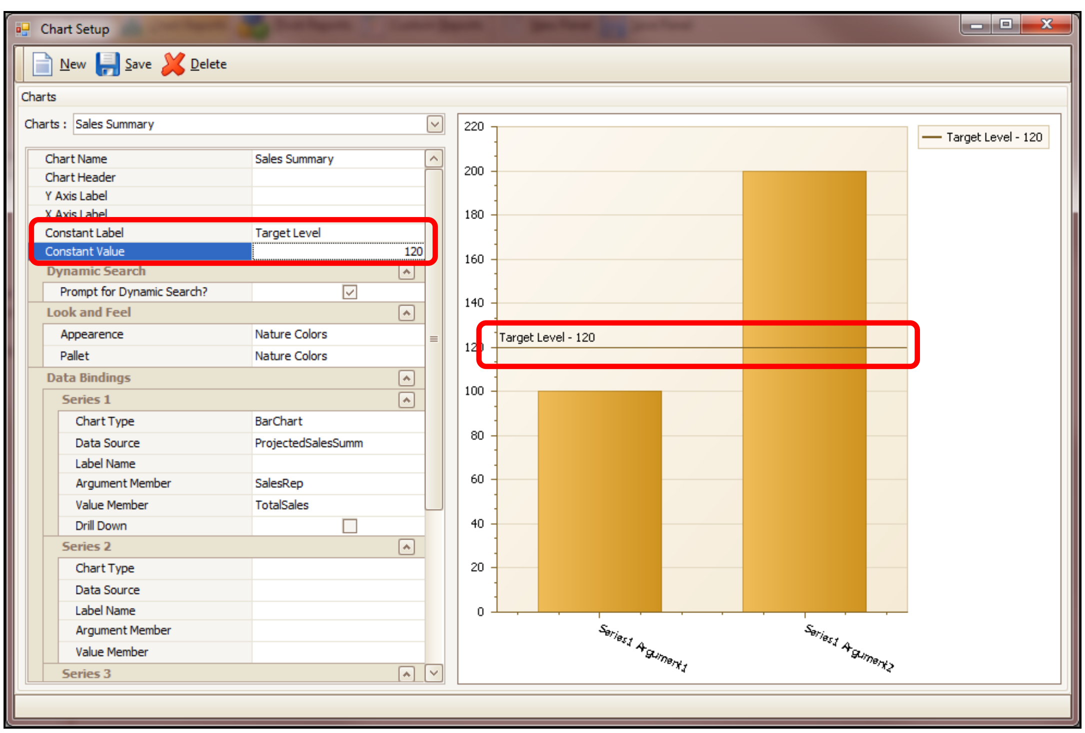


6. Click **Save** when done.

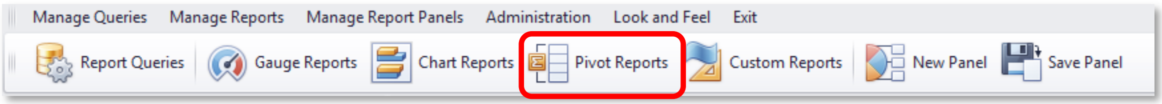
Working with Constants

You can define a Constant Value which will display in your charts. Enter the name and value in **Constant Label** and **Constant Value**.

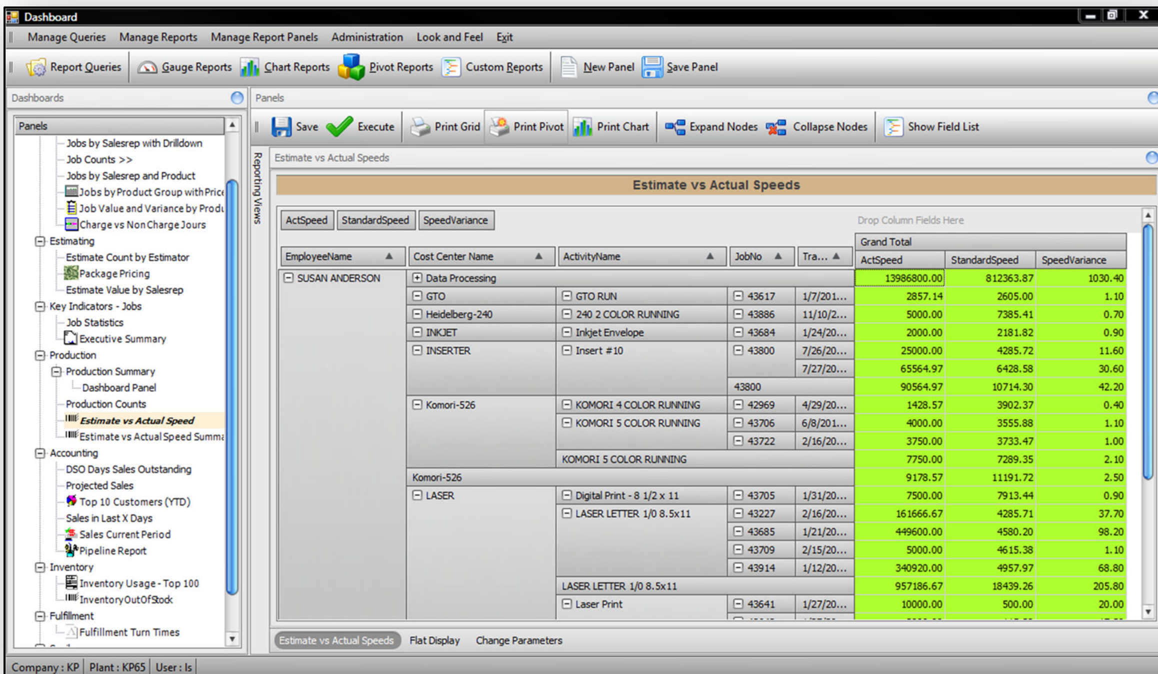
In the example below we have defined a Constant called Target Level and its value is 120.



Pivot Reports



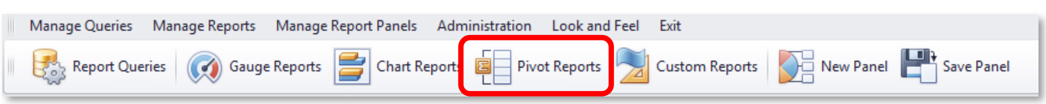
The Pivot Report option allows you to represent the same data in various ways by creating different views of the same query.



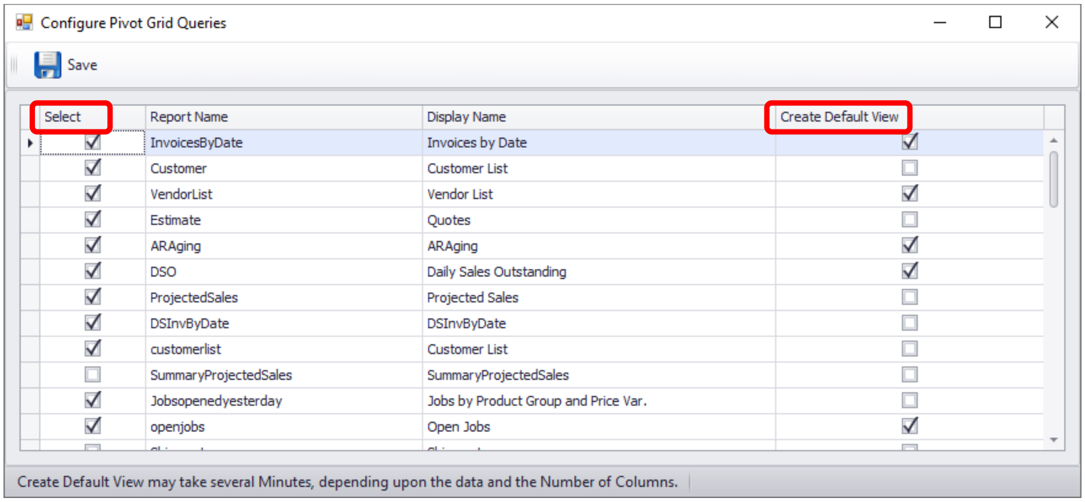
Creating a Pivot Report

To create a pivot report

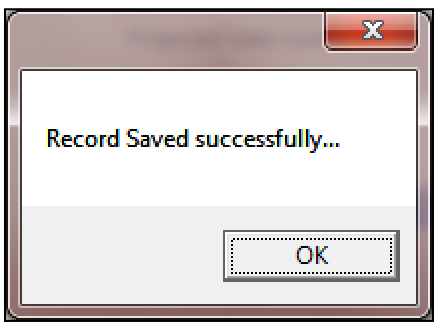
1. Select the **Pivot Reports** icon.



2. Select an existing report from the list and check both the **Select** and **Create Default View**.



Click **Save**.

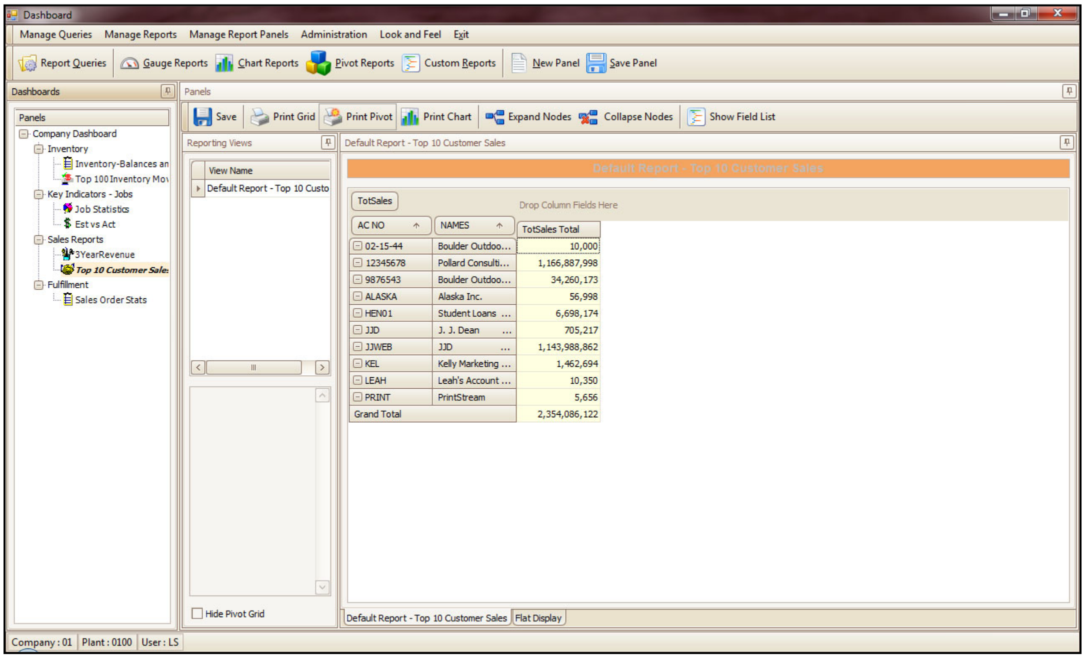


The Pivot Report is now available to use when creating Panels.

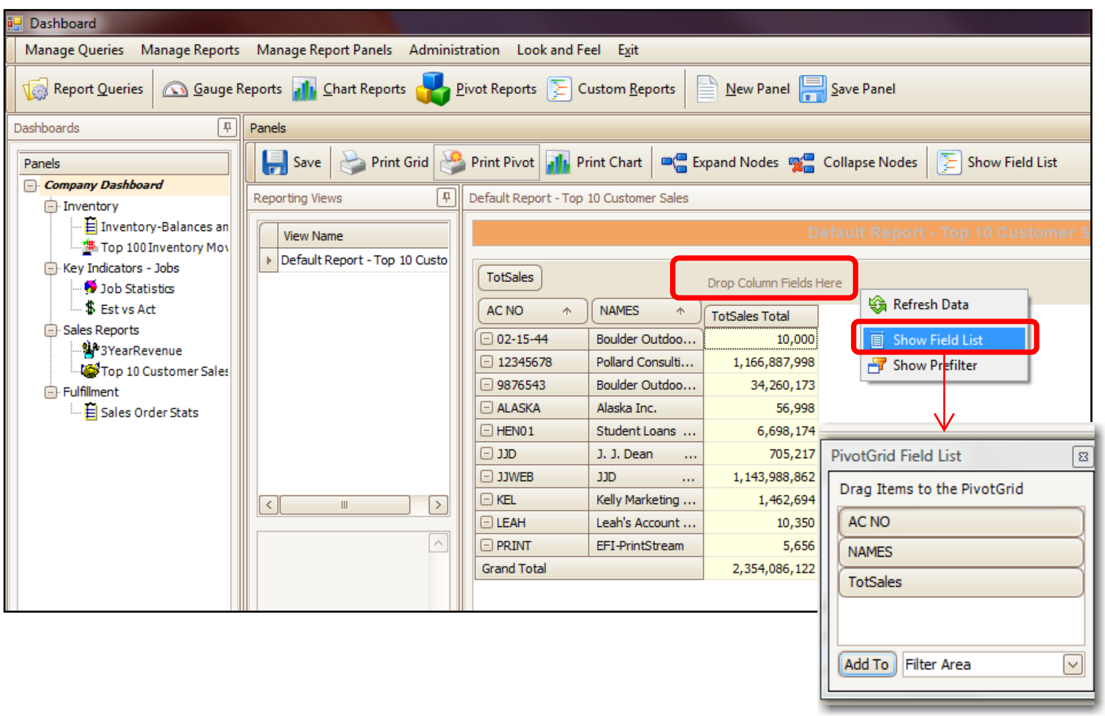
3. Add the newly created Pivot Report to the menu. See the section "*Adding a Panel or Pivot Report to the Menu"* of this document for details on how to accomplish this.

Note Creating default Pivot Report Views may take several minutes depending upon the data and number of columns.

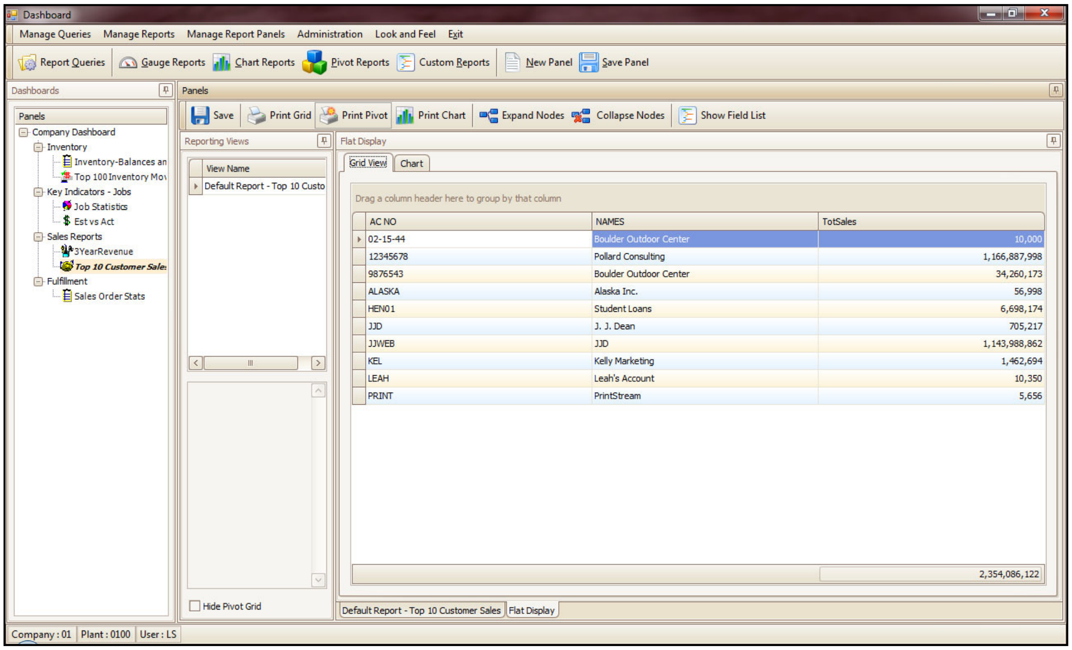
4. After the Pivot Report has been adding to a panel it will open in the default view.



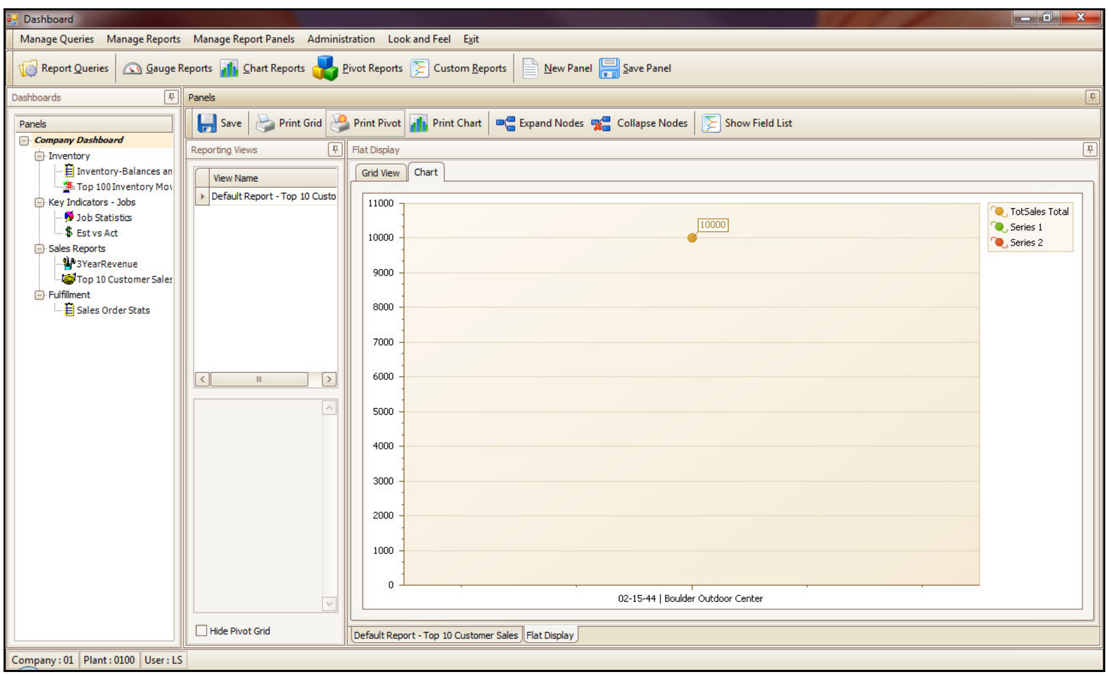
5. Click in the area that says “Drop Column Fields Here” and then select **Show Field List**.



6. From the list of available fields (determined by the query) click and drag those fields that you wish to have as part of your Pivot Grid.
7. Select the **Flat Display** tab to change the view.

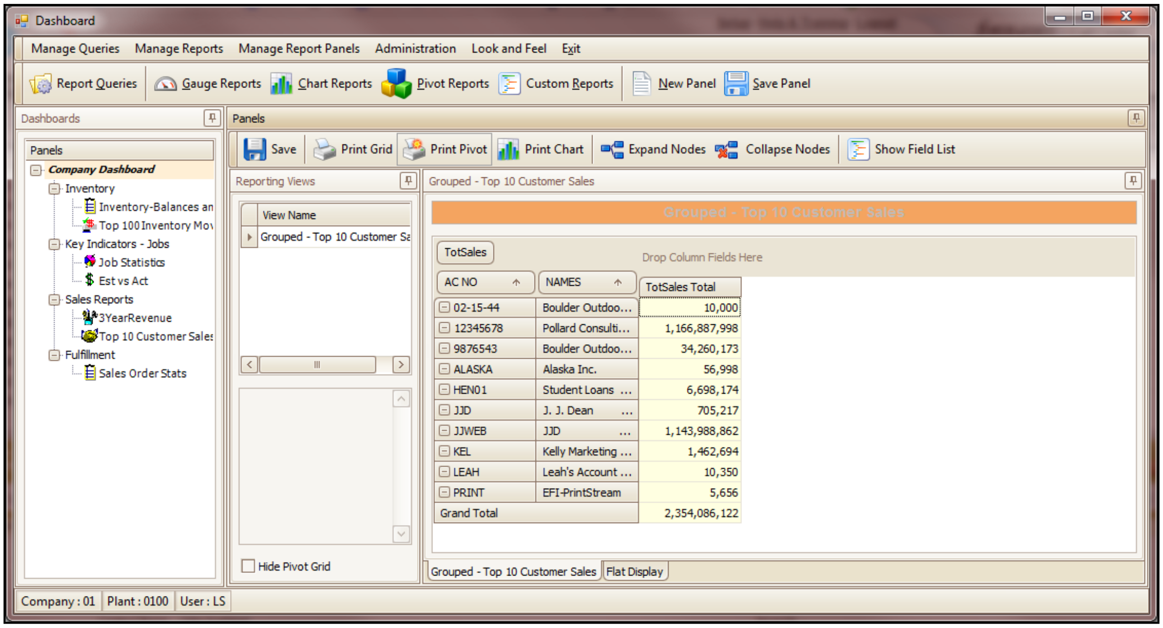


8. Select the **Chart** tab to view a chart view.

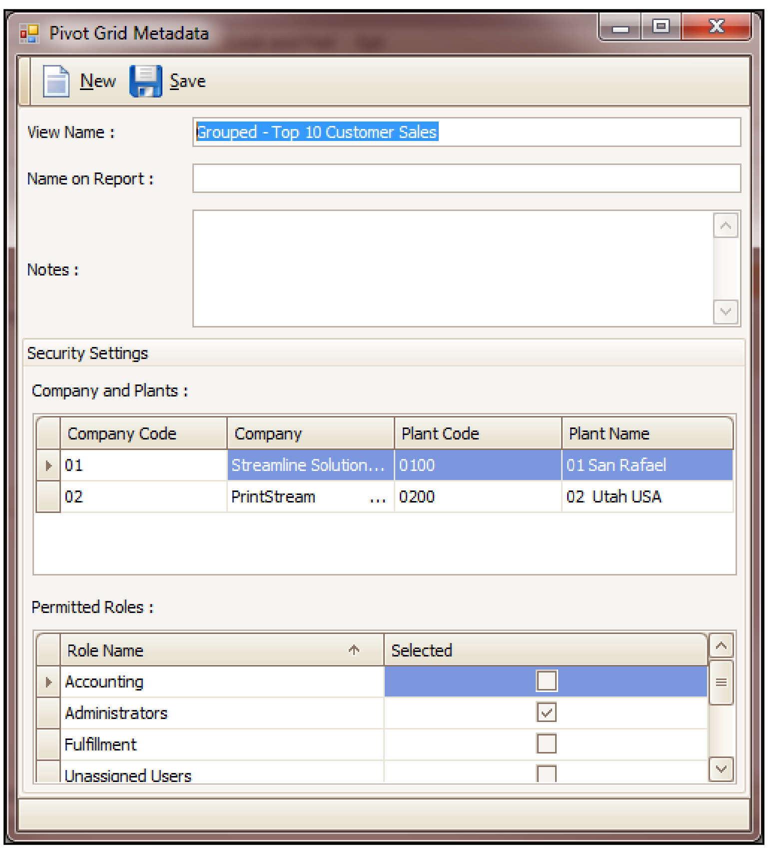


Working with the Data in the Pivot Report

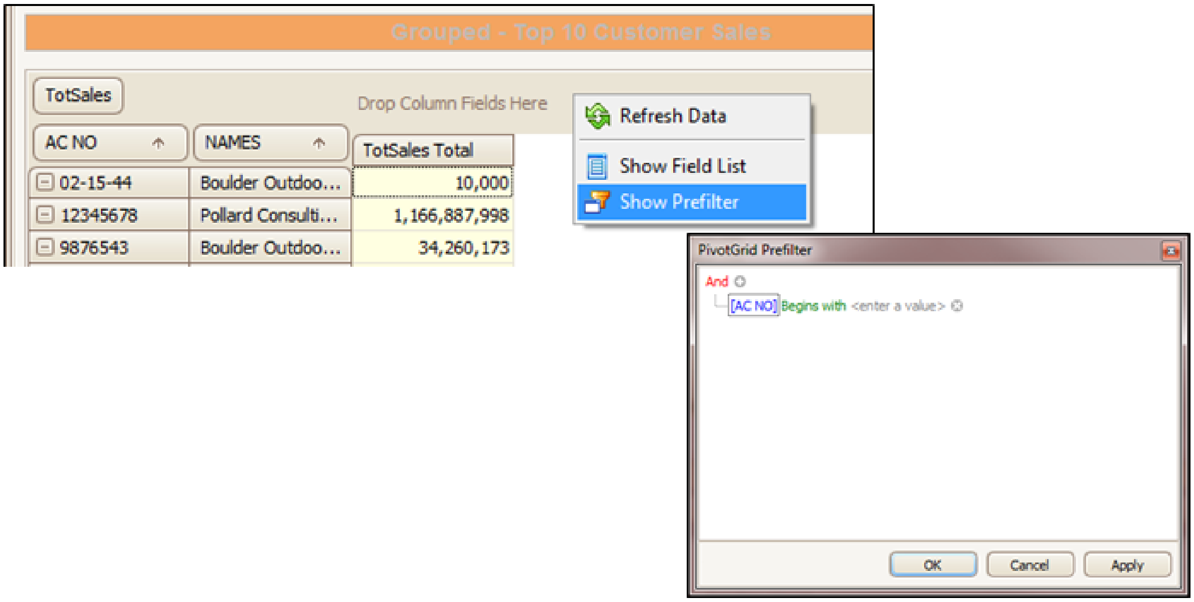
Once you have the data you want, you can sort and group to a format as you need.



Once the data is grouped and in the preferred order click **Save**. Provide a name for this view. Multiple views of the same pivot grid may be created and stored.



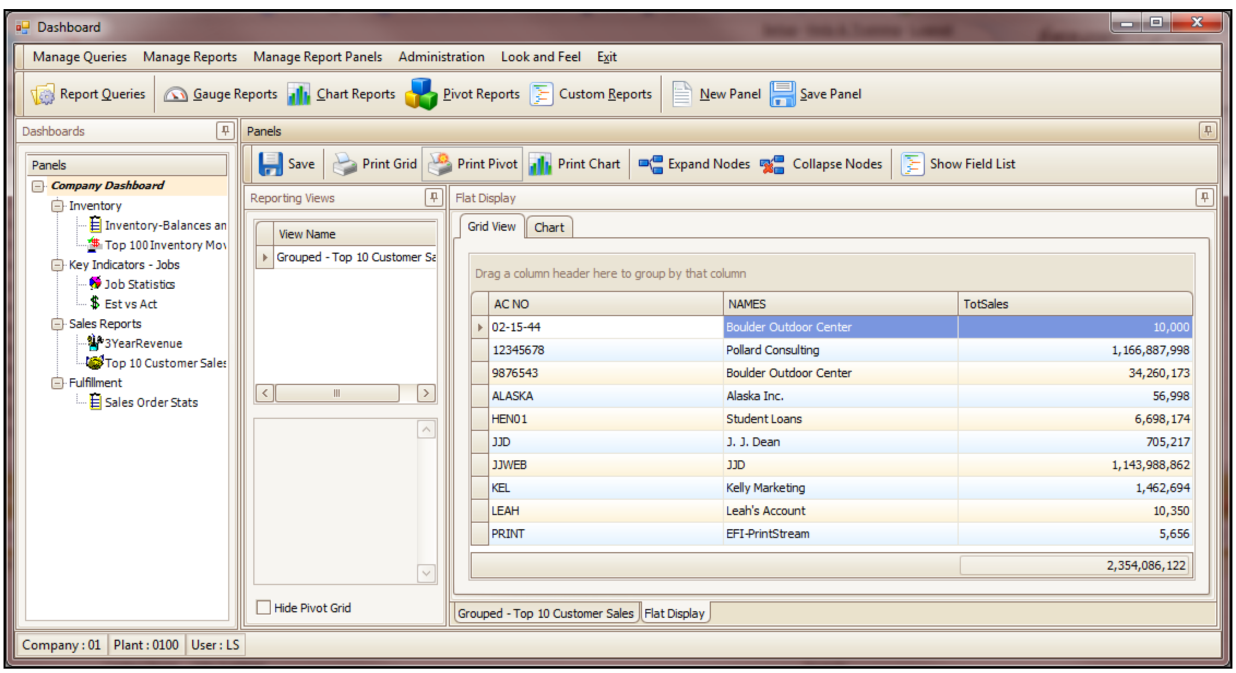
The data within the pivot grid can also be dynamically changed by using the **Parameters** section of the window and applying filters such as date ranges.



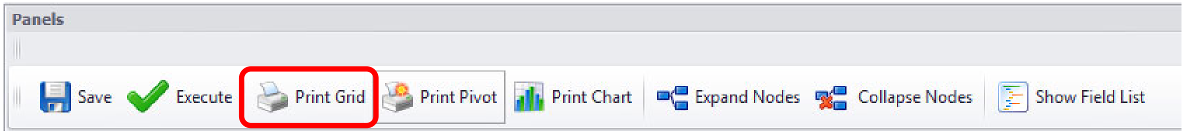
On the **Flat Display** tab there are two view options for Pivot Report data: Grid View and Chart View.

Grid View

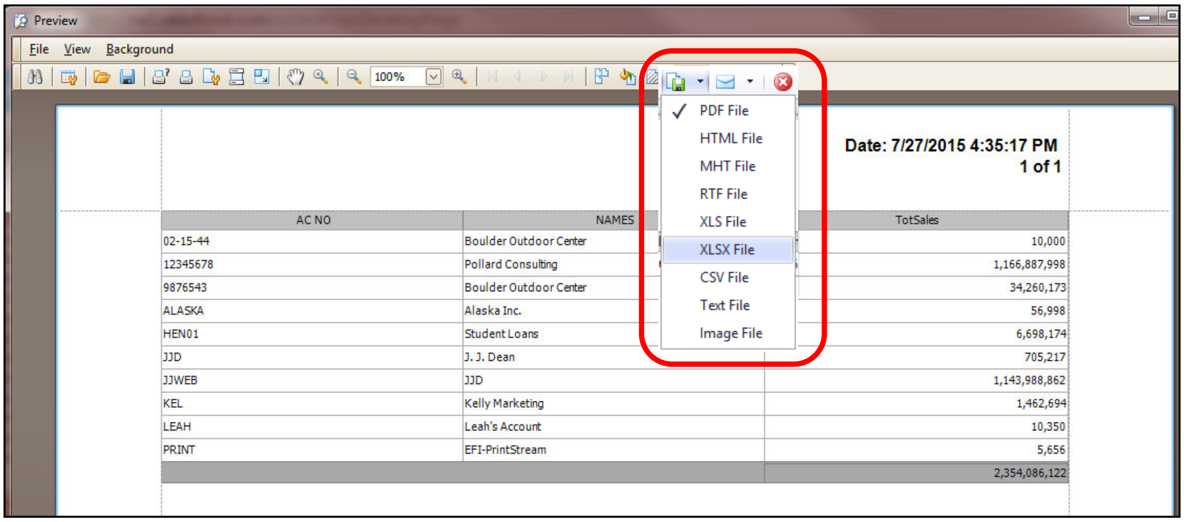
The data in the grid may be sorted and re-arranged.



You can print the Grid View.



You can also export the data.



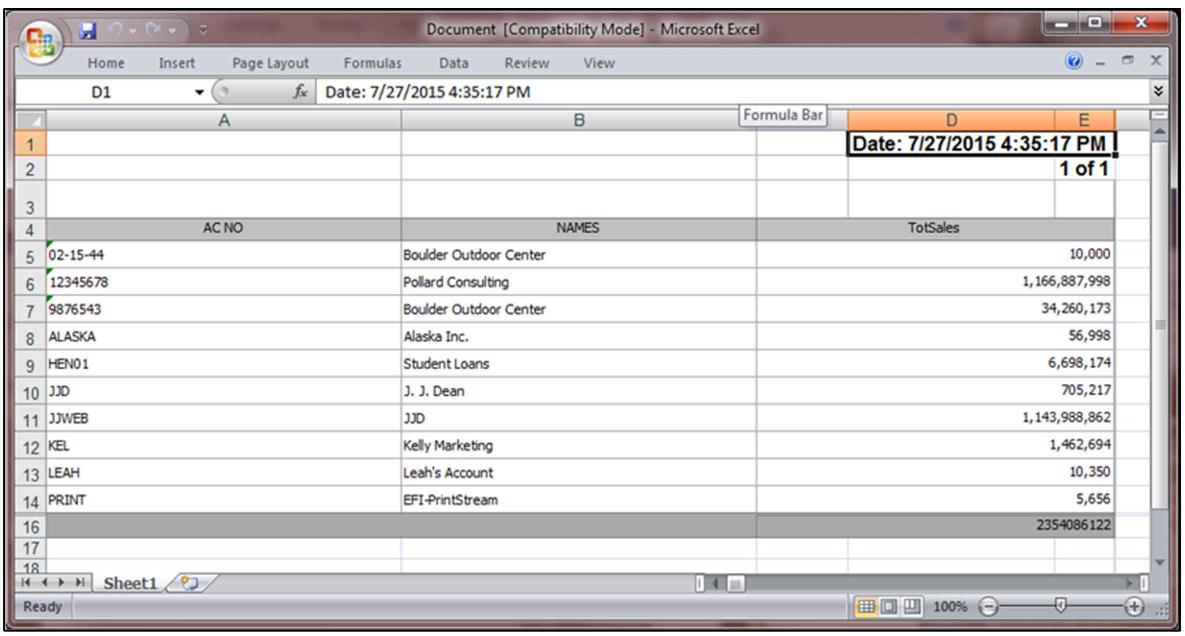
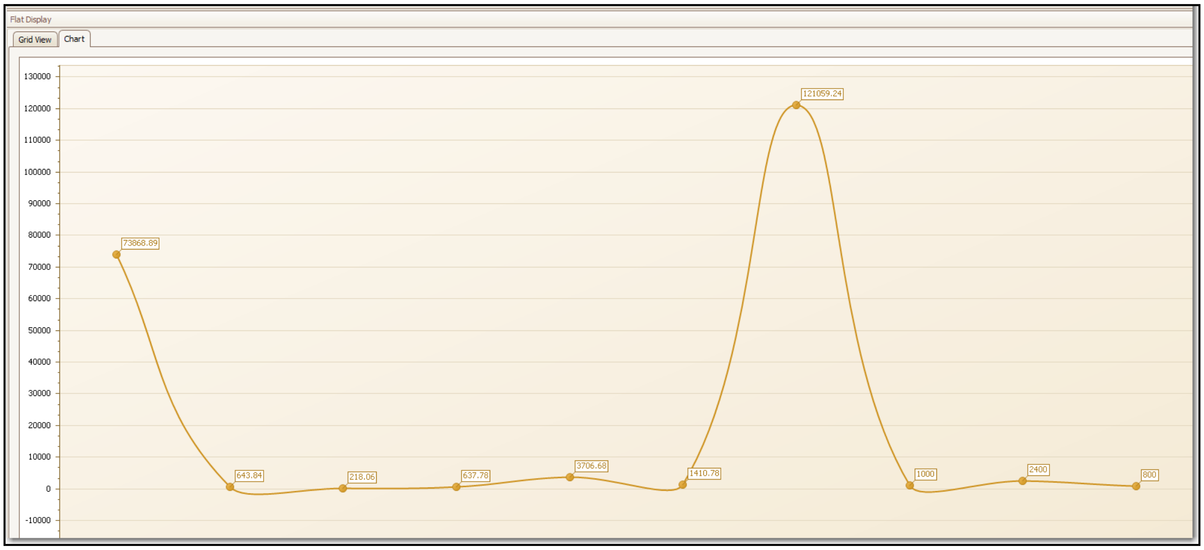
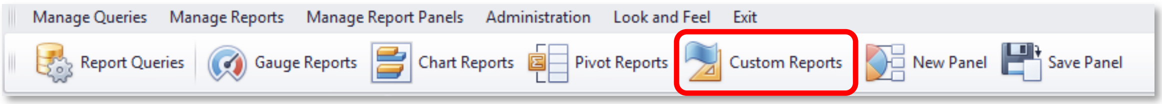


Chart View

You can also view the data in chart form.



Custom Reports

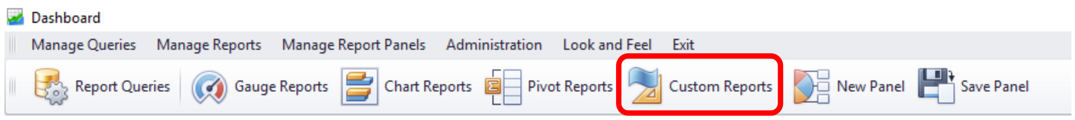


You can create customized reports in Dashboard using DevExpress which is a report designer tool. Use DevExpress to drag and drop data onto a design page.

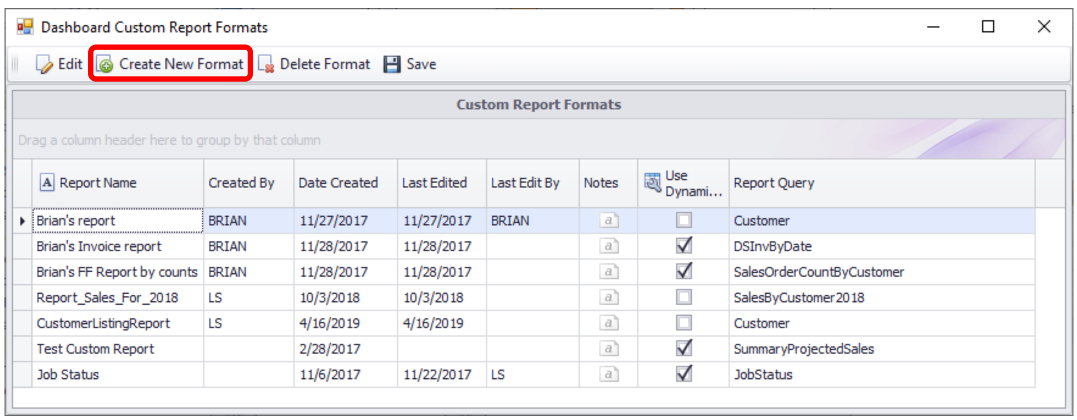
Defining a Custom Report

To define a custom report

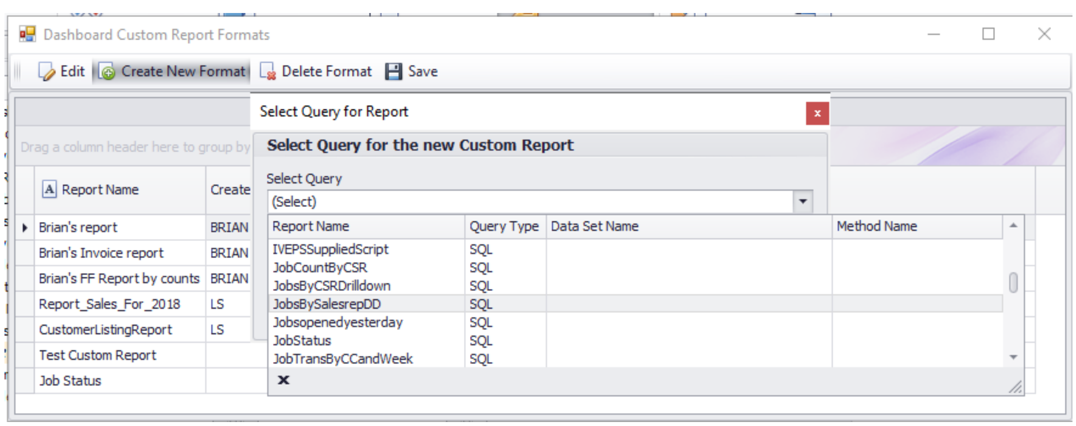
1. Select the **Custom Reports** icon.



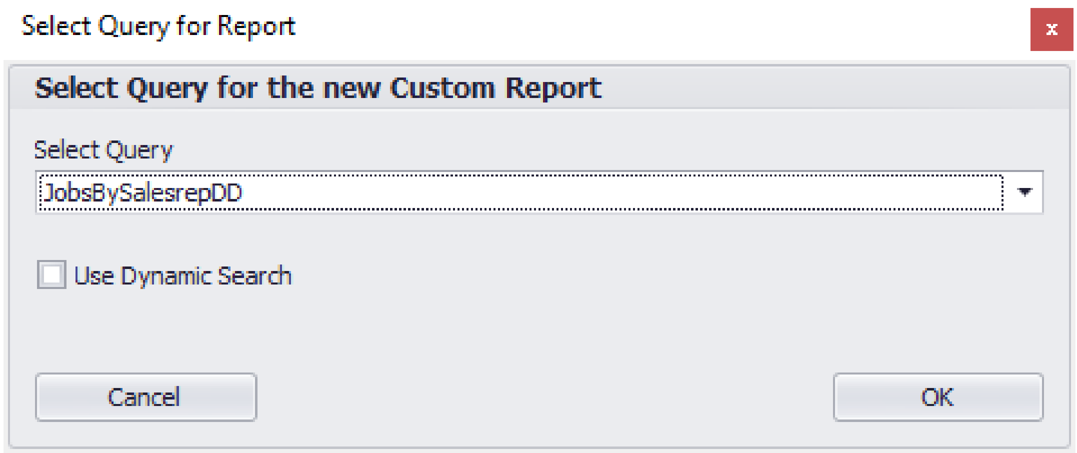
2. In the Custom Reports Formats setup window, click **Create New Format**.



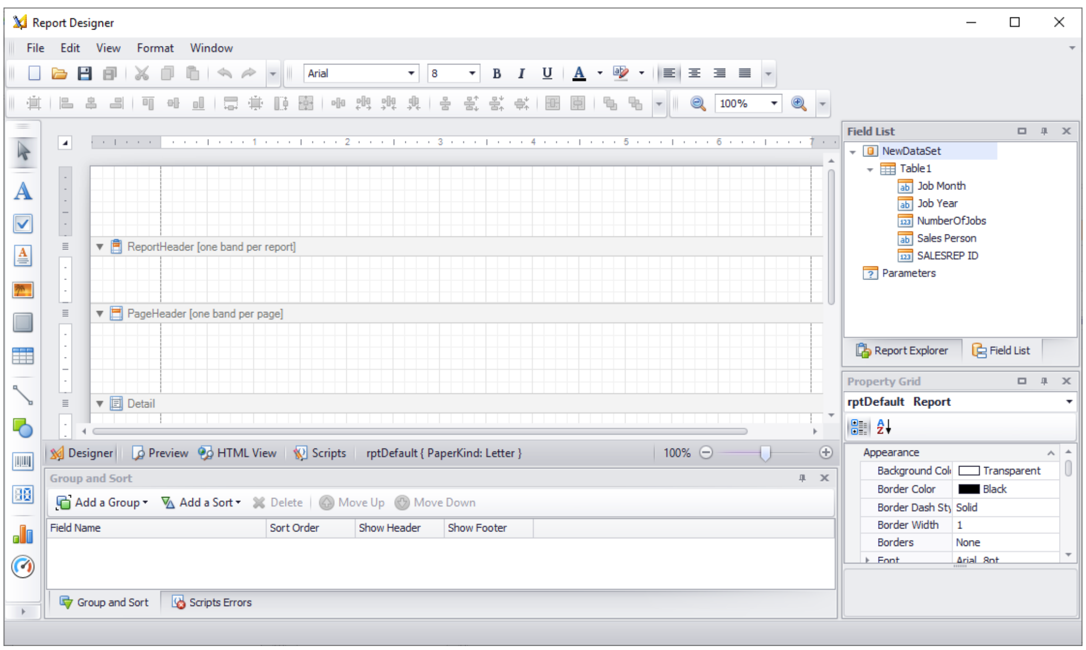
3. Select the SQL to be associated with this new report.



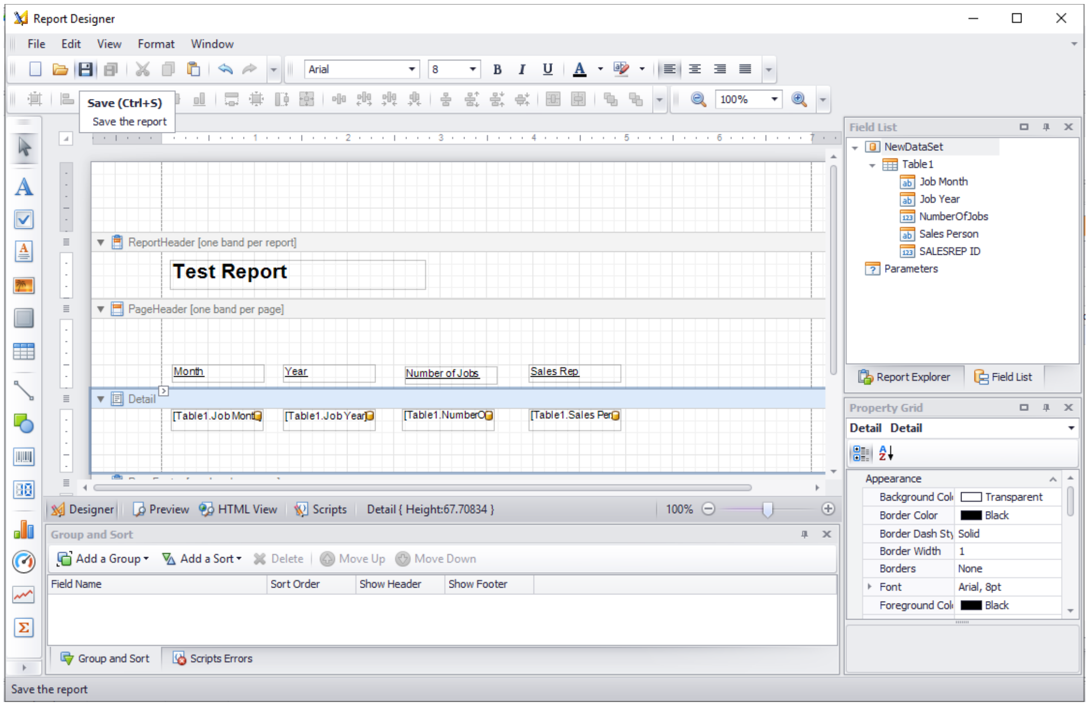
4. Select OK.



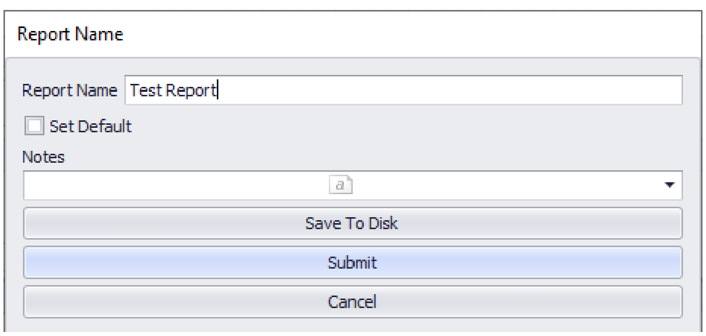
5. The DevExpress report tool opens.



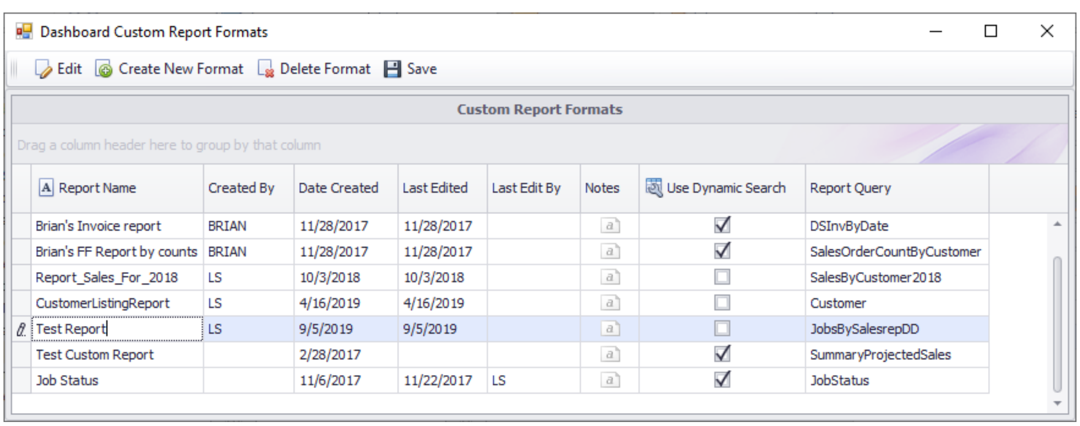
6. Drag fields onto the Report Format area and click **Save**.



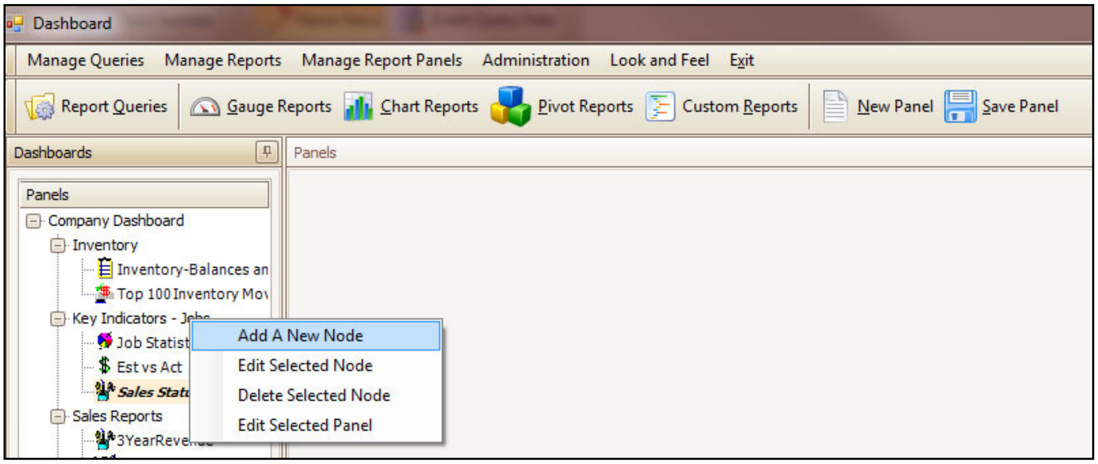
7. In **Report Name** enter a descriptive name for this report and select **Submit**.



8. The new report displays in the grid below.

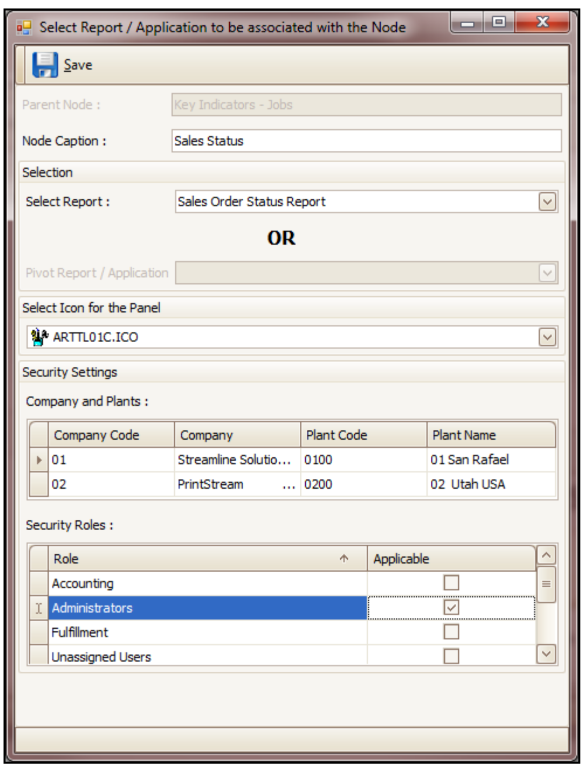


9. Once the report is saved, you must add a link to the custom report in Dashboard. In the Dashboard tree, right-click a node and click **Add a New Node**.

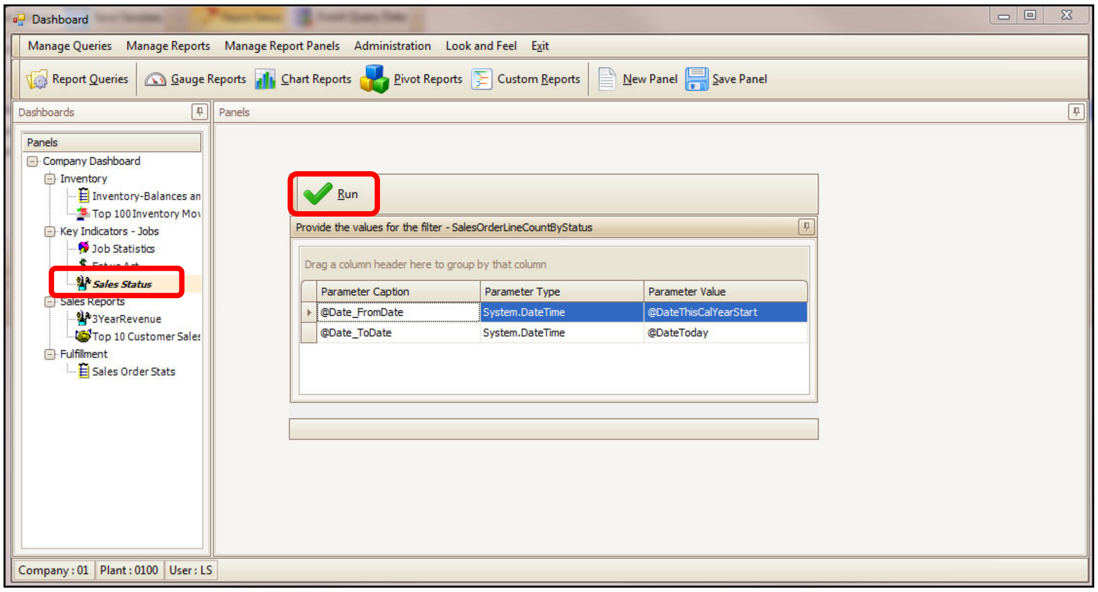


10. Enter a descriptive **Node Caption** and then use the **Select Report** drop-down to choose the report. The report type will be Custom Report.

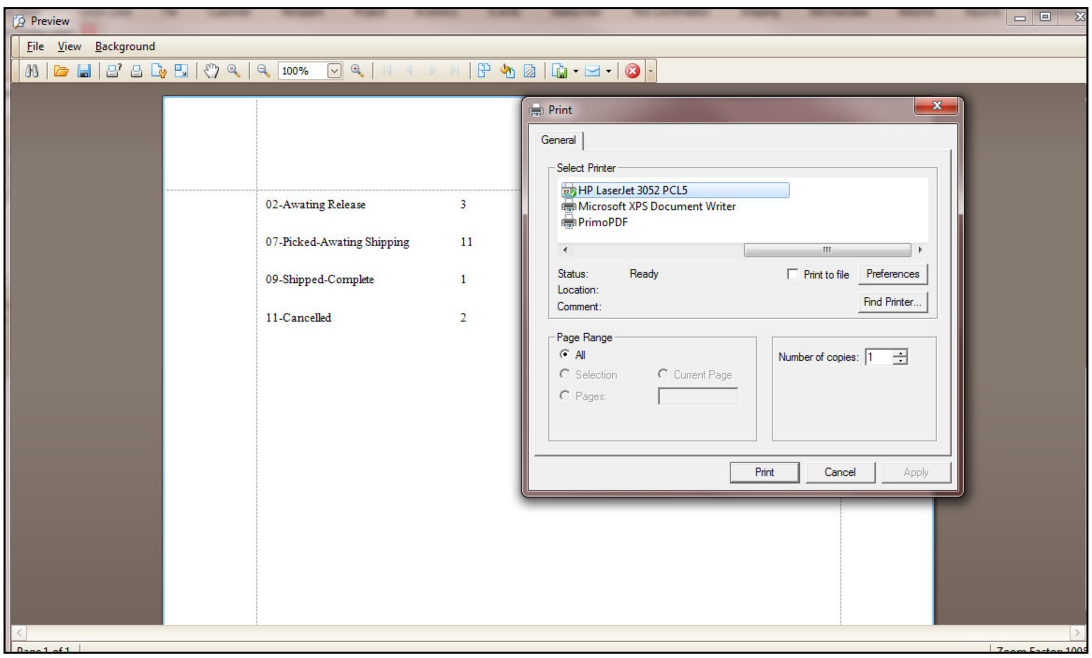
    Then choose which Company and Plant(s) will have access to this custom report and choose specific Security Roles as well. Click **Save**.



11. From the report tree, select the custom report and click **Run**.



The report will display and you have the option to print.

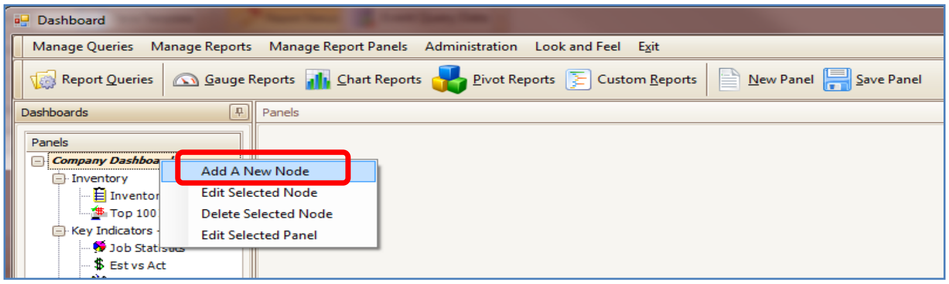


Defining the Menu Structure

The menu structure within the Dashboard is completely customizable. Use this feature to further organize your reports.

To add nodes to the menu tree

1. In the Panels menu tree, right-click anywhere and then select **Add A New Node**.



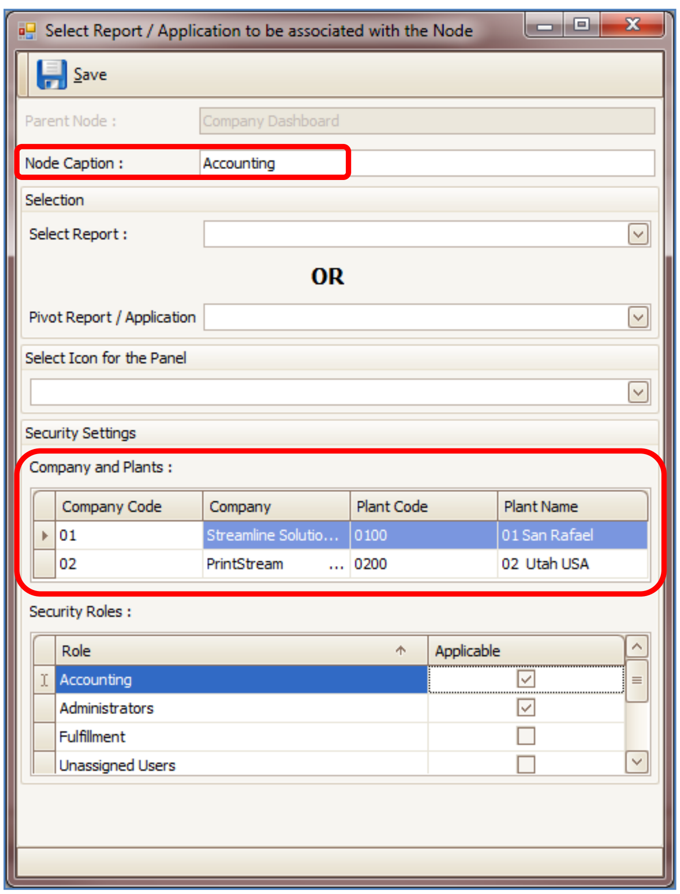
2. In the Node setup window, enter the following:

   Node Caption: Enter a descriptive name for the new node which will display in the menu tree.

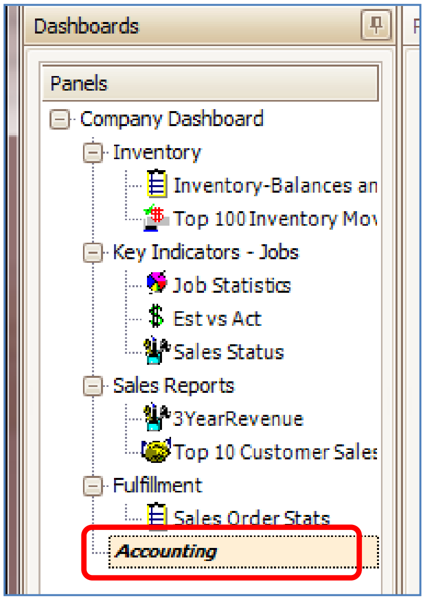
   Company and Plants: Select the companies and plants to which you want to give access to this node.

   Security Roles: Select specific user roles to which you want to give access.

   Select Report At the node level you can associate a report but it is not required. See the section below *Adding a Panel*.



3. Click **Save**. The new Node is now available.



To further organize your reports, you can add sub-menu items or nodes and associate them to specific reports.

To add sub-nodes

1. From the menu, right-click an existing node and select **Add A New Node**.
2. In the new node window, enter the name and security options for the node.
3. Click **Save**.

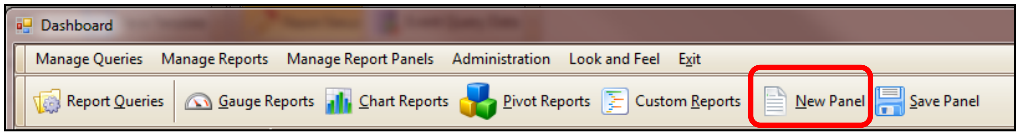
Note Repeat the above steps to create as many sub-levels as needed.

Creating a Panel

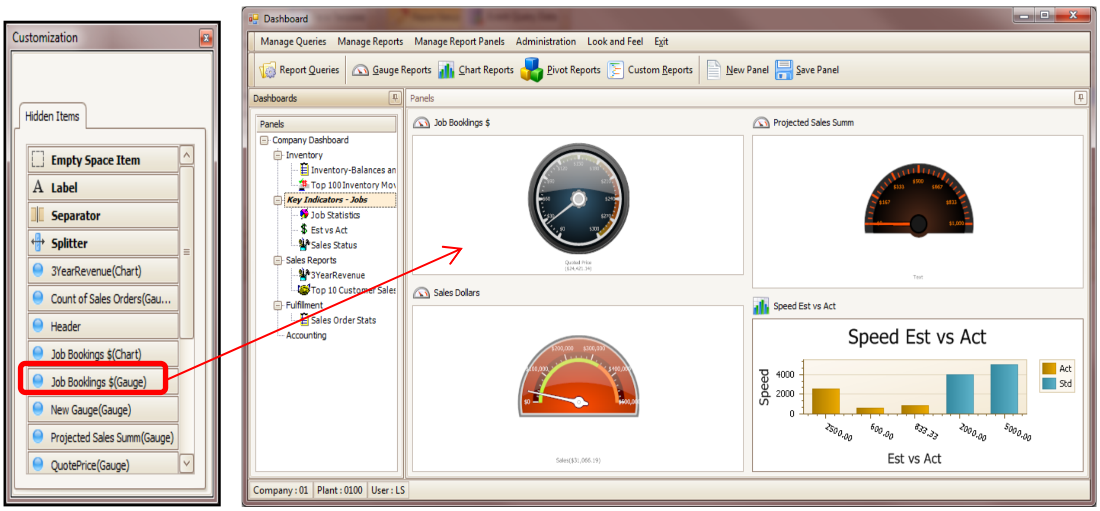
Panels consist of gauges and charts that can be viewed in one display.

To create a panel

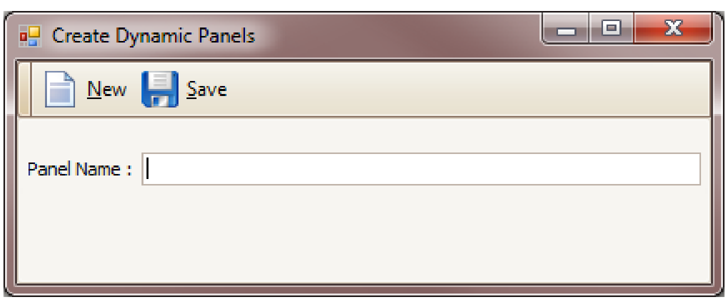
1. Select the **New Panel** icon.



2. In the Customization window, select the report (gauge, chart or pivot report) you want to add to the panel. Now drag the report to the panel. You can drag and drop several reports to the same panel.



3. Select the **Save Panel** icon and then enter a descriptive name for the new panel. Click **Save** once again to complete the process.

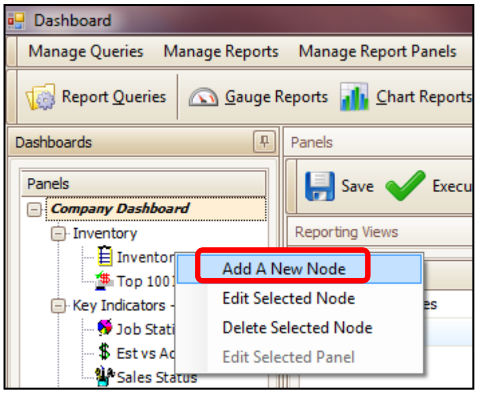


Adding a Panel or Pivot Report to the Menu

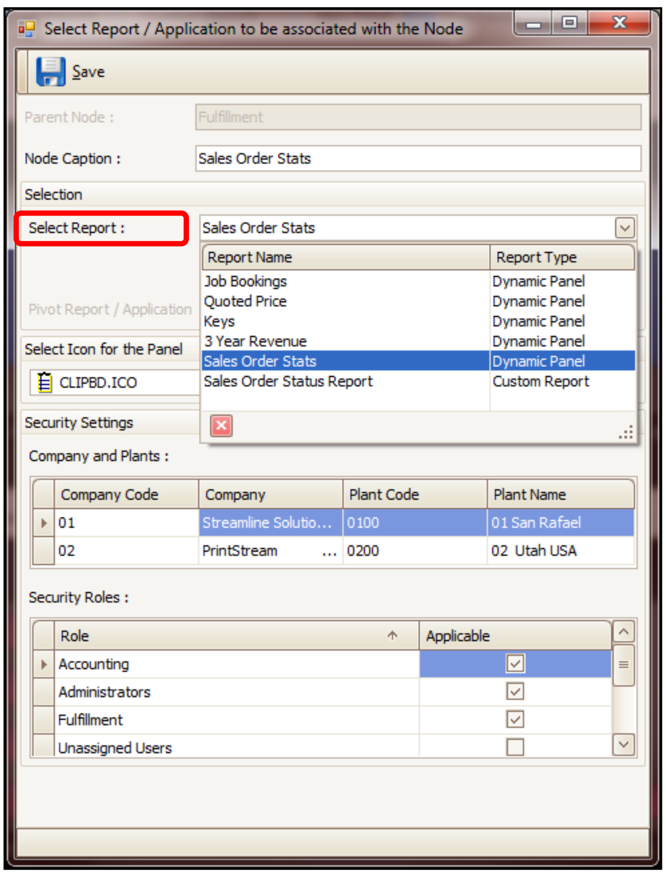
Once you create panels and pivot reports you can add them to the menu tree.

To add a panel or pivot report to the menu

1. In the menu tree where you would like to add the report, right-click and select **Add A New Node**.



2. Select a report from the **Select Report** drop-down menu.



3. Select the **Company and Plants** along with the **Security Roles** to which you want to grant access to this report.
4. Click **Save** when finished. The panel will now display in the menu tree.