cobra®
CRM

Dashboard Overview

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This document does not constitute an assurance of product attributes. The range of functions of your product may differ from the functional range described here.

August 2020

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www.cobra.de

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Intelligent Business

Use cobra dashboards to profit even more from your data. They enable you to collect, link, show and thus evaluate your data more quickly, more efficiently and targeted individually to your goals. These analyses will provide all the information you require for well-founded decisions. On the basis of such profound knowledge you can organize your business processes and customer relationships more efficiently and more successfully.

cobra offers you the Dashboard as the controlling unit for your company. You can visualize and link intelligently the data obtained from cobra as well as from other programs.

Installing

You find more information on the installation process in the System Administrator Manual.

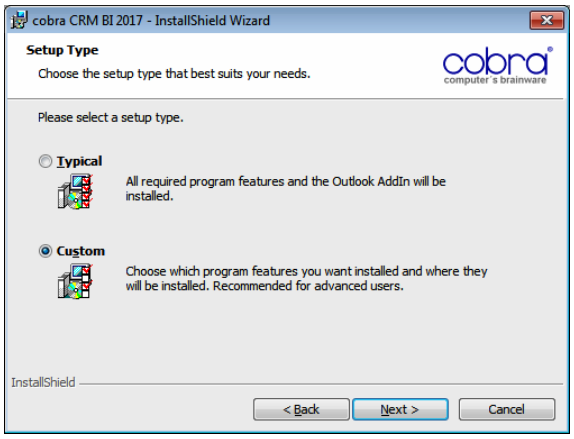
Dashboard consists of two components:

The Dashboard Designer to create evaluations and the Dashboard Viewer to visualize evaluations and reports. This has effects on the installation: During installation, the Dashboard Viewer will be installed automatically on every computer. However, you must have the Dashboard Designer installed explicitly on the computers required when installing single workstations or clients.

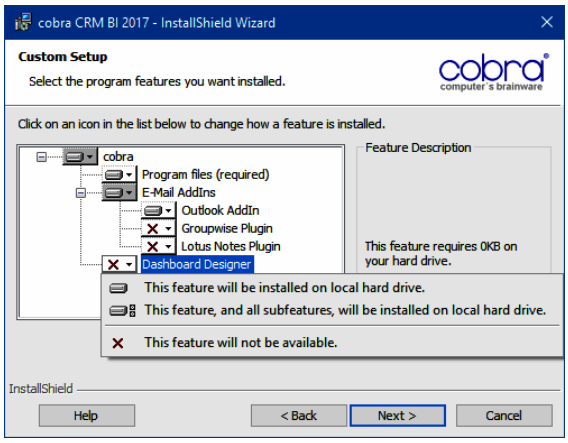
Installation for Single-User stations

Select the »expert« installation mode.

During installation, you will arrive at this dialog in the InstallShield:



- Opt in for »Custom installation«. Click »Next«.



- Have the Dashboard Designer installed on your local hard disc as shown above.

Then continue installation as usual.

Server-Installation

Select the »expert« installation mode.

Carry out installation of the server as usual.

When installing a client you will reach the same point as described in the single-workstation installation above.

- On computers where you do not want to install the Dashboard Designer (*no installation*) you do not need to do anything.
- On computers you want to install the Dashboard Designer on (*install*), at the InstallShield point described above proceed as described for the single-workstation installation. The Dashboard Designer will then be installed locally on the hard disc.

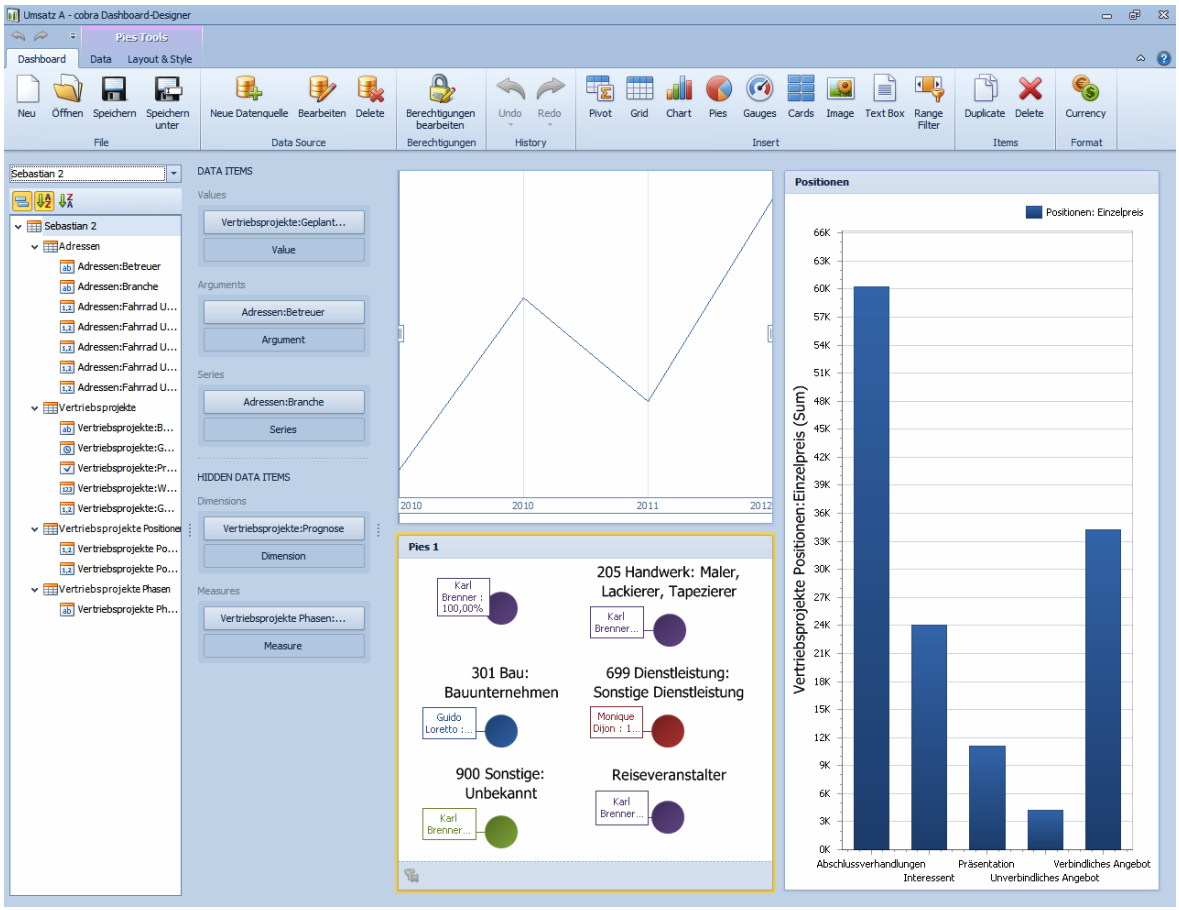
This is what Dashboard looks like

Dashboard is basically made up of two completely different elements: Designer and Viewer.

In networks, users can use the Dashboard Designer to create dashboards and make them available to all users via the Dashboard Viewer.

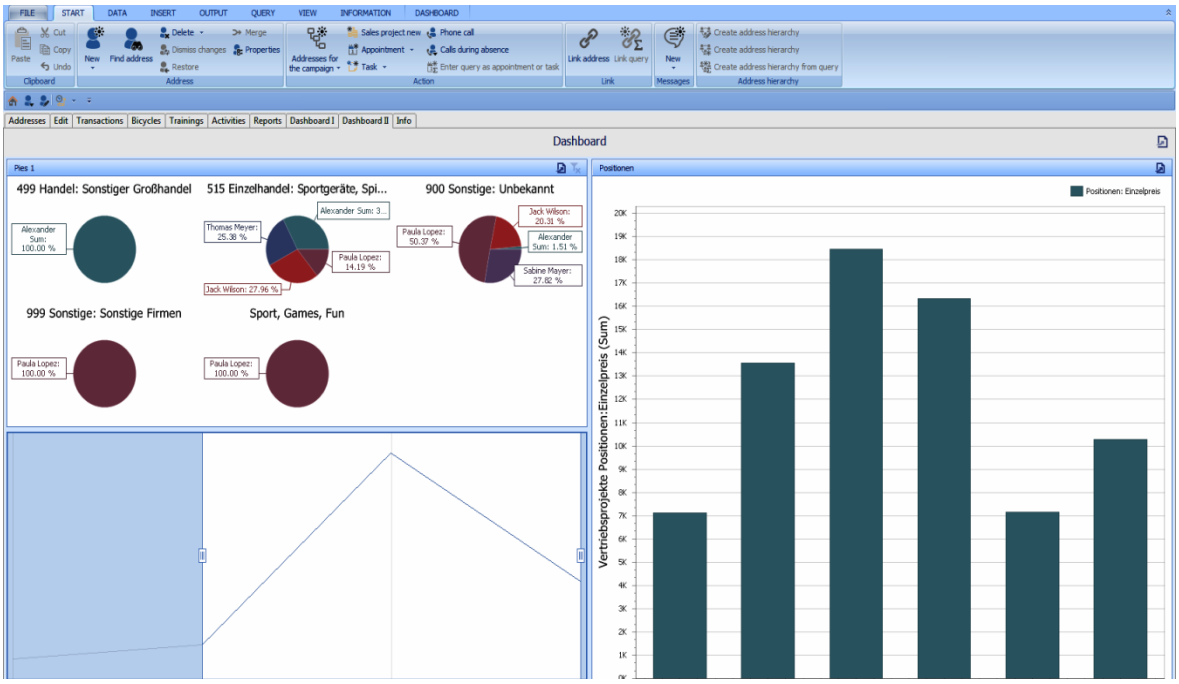
Dashboard Designer

The Dashboard Designer is a standalone program. Use it to create your own dashboards. Dashboards can be designed using many different elements such as charts, graphs, pie charts, texts, figures etc. You can use a dashboard to display and view data not only from cobra, but also from other programs such as an enterprise resource planning program (ERP). Under certain conditions they can even be displayed together.



Dashboard Viewer

The Dashboard Viewer is a view element linked to a dashboard and showing it directly in cobra. The system administrator will integrate the Dashboard Viewer into one or more cobra views.



Important Elements

Pivot Tables

Pivot tables represent data in tabular form and allows you to aggregate them.

Pivot 1

	Gesamtergebnis		
	Umsatz 2011	Umsatz 2012	Umsatz 2013
Paul	50,57K €	14,79K €	0,00K €
Volker	61,75K €	440,92K €	529,67K €
Gesamtergebnis	112,32K €	455,71K €	529,67K €

Grid

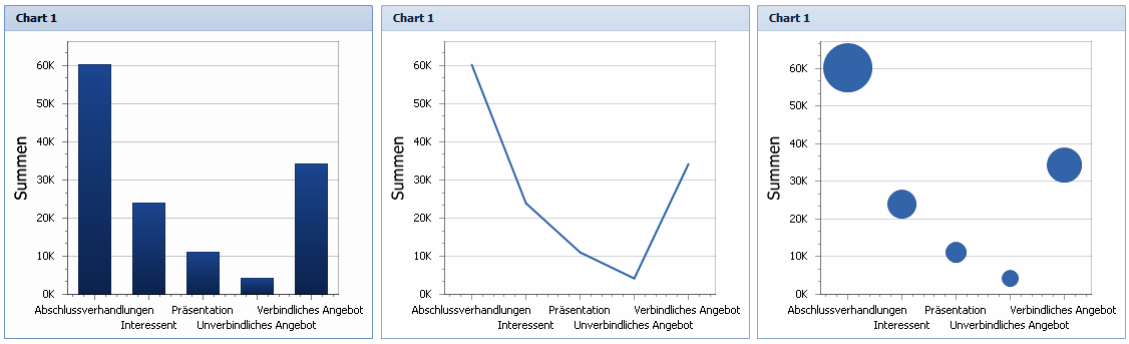
The grid is a data grid to show data neatly arranged in tabular form.

Grid 1

Betreuer	2011	2012	2013
Jack Wilson	98,5K	428K	496K
Monique Dijon	0	0	0
Paula Lopez	13,8K	27,6K	33,3K

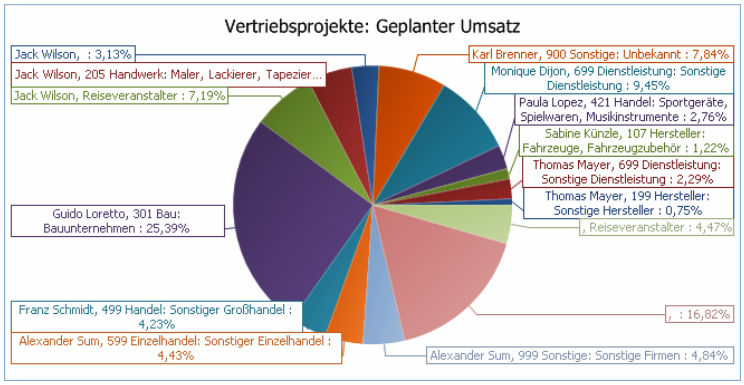
Chart

This is the classic X-Y-diagram existing in many forms that can visualize data in different ways: as a Gantt chart, scatter, line, area, region, bubble, and financial chart.



Pie

This is the traditional pie chart showing how individual values contribute to the overall sum.

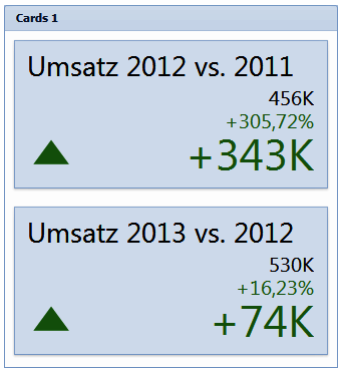


Gauge

These view elements resemble the needles in the cockpit of a car or motor bike. Several gauges can be shown in a chart. Every gauge can show and compare two different values: one via the mark set previously, the other via the needle itself.

Cards

Cards show two different values being compared to each other. Such a comparison can be done in absolute values or on a percentage basis.



Image

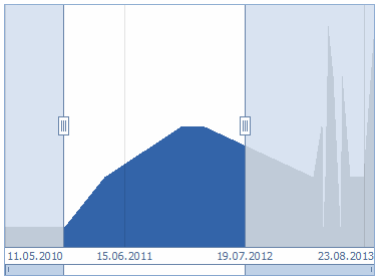
An image element can hold an optional photo, a logo, graphics etc.

Text Box

A text box can hold any text.

Range Filter

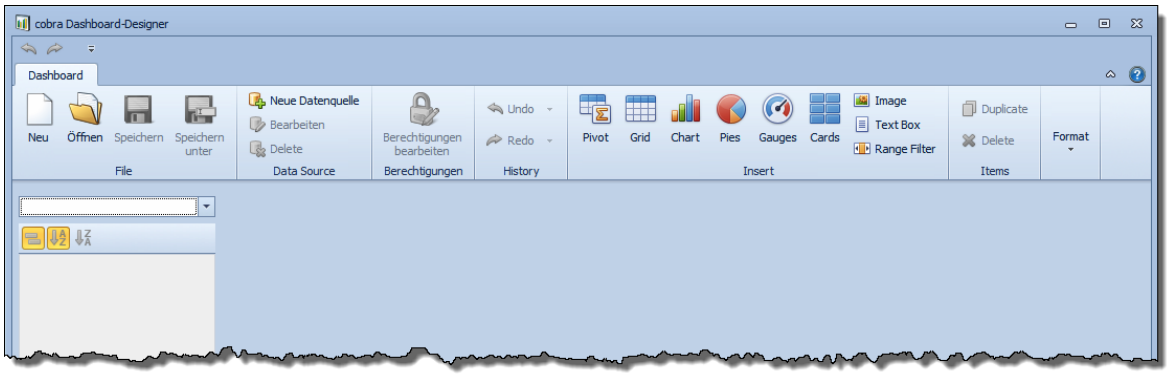
A range filter enables a user to filter a specific range of data interactively, e.g. using a slide control. All the other charts of the dashboard will be adjusted automatically and will then evaluate only the period selected here.



Creating and Administrating Dashboards

Use the Dashboard Designer to create, edit and administrate dashboards.

- Start the Dashboard Designer from the Windows start menu by selecting it in the cobra program group.



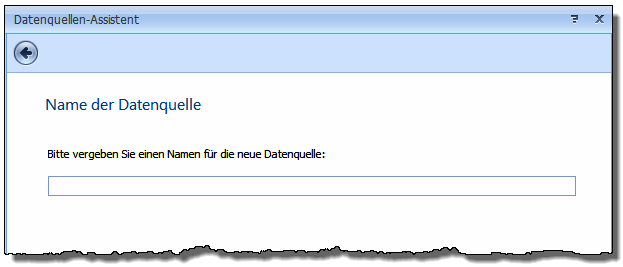
Creating a New Dashboard: Selecting Data

- Create a new dashboard.
- Click »New«.

A Wizard will be started.

Step 1 – Name

- Give the new dashboard a name. A dashboard may contain several data sources having their own names – the data source name required will be entered in a later step.

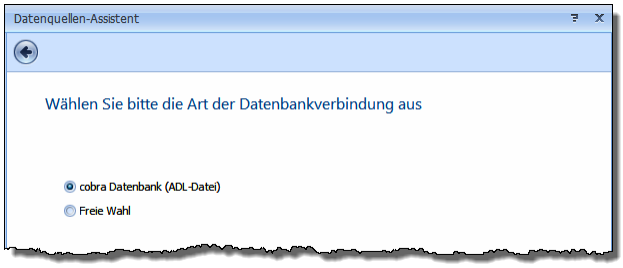


Step 2 – Selecting a Database I

In step 2 select the source of the data you want represented in the dashboard. You can choose between cobra and other databases. In the next step you will specify which data are to be evaluated.

- If you do not want to work with a cobra SQL database, click »Free choice«.

- You must specify a data source here. Later you can use the command »New data source« to assign additional data sources to the dashboard.



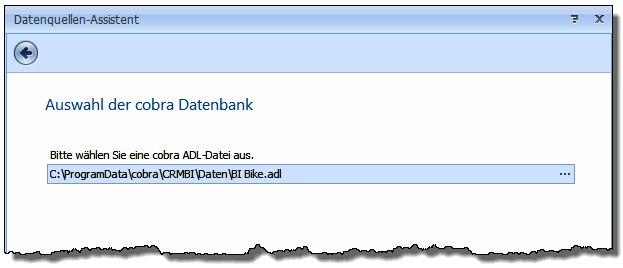
Besides cobra databases you can also work with other types of data sources, not only SQL databases, but also databases of a variety of other formats.

Please note that the viewer will always use the cobra database open at this moment. It can, however, also display data from any other sources.

Step 3 – Selecting a Database II

3 a) – cobra database (ADL)

- If you want to evaluate a cobra database, click the button and enter the location of the ADL file containing the connection link to the required database. By default these files will be in your cobra installation in the \data subdirectory.
- Later you can add other data sources to this dashboard coming from cobra or other applications.



3 b) – free choice

Here you can choose from various database formats. Dashboard supports more than a dozen different data providers, among them MS SQL Server, MS Access, Excel, OLAP, Oracle and MySQL.

Provider ..... Select here the type of database to be integrated. This choice will determine which additional options will be offered to you.

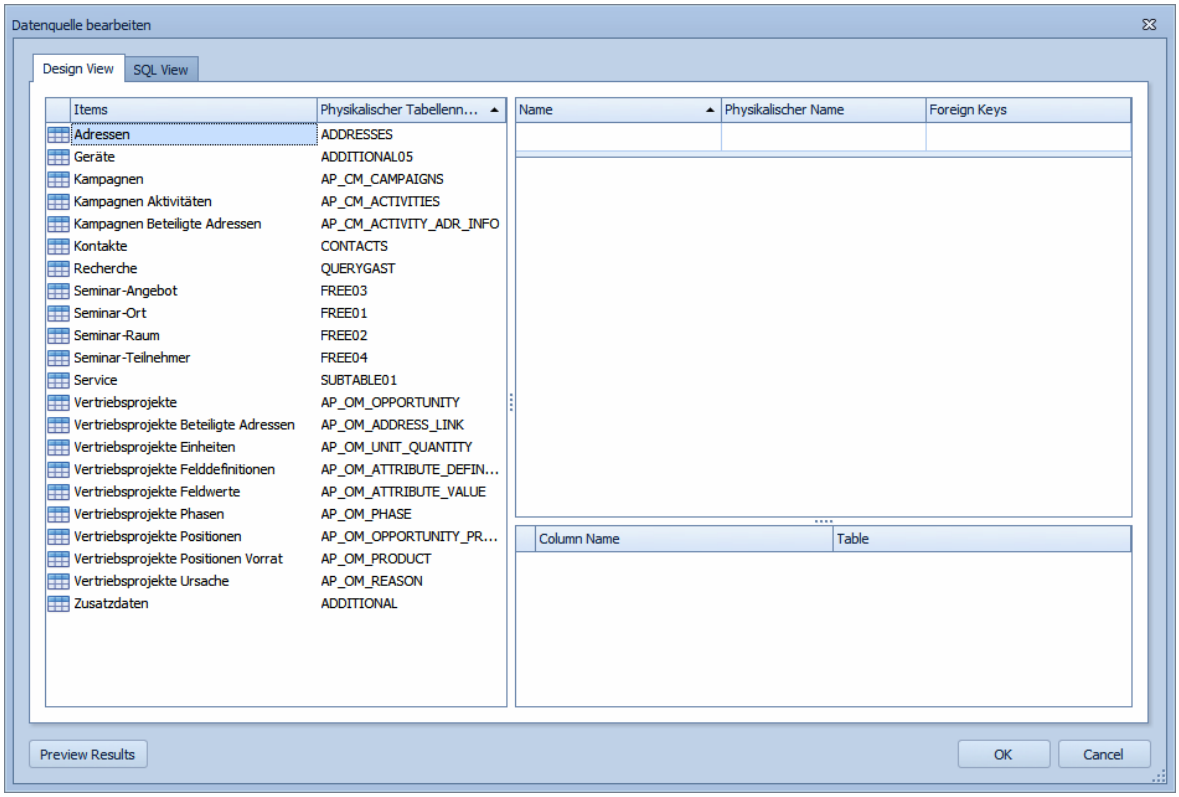
Connection Name ..... You can access different data sources in one and the same database, such as marketing data as well as address data. For each of these data tables within the same database you need to enter a separate data connection. Each of these data connections will be addressed via its own connection name.

Data from different sources can only be connected if there is a field with the same name in both data sources (such as »Customer name«).

Arranging the Data

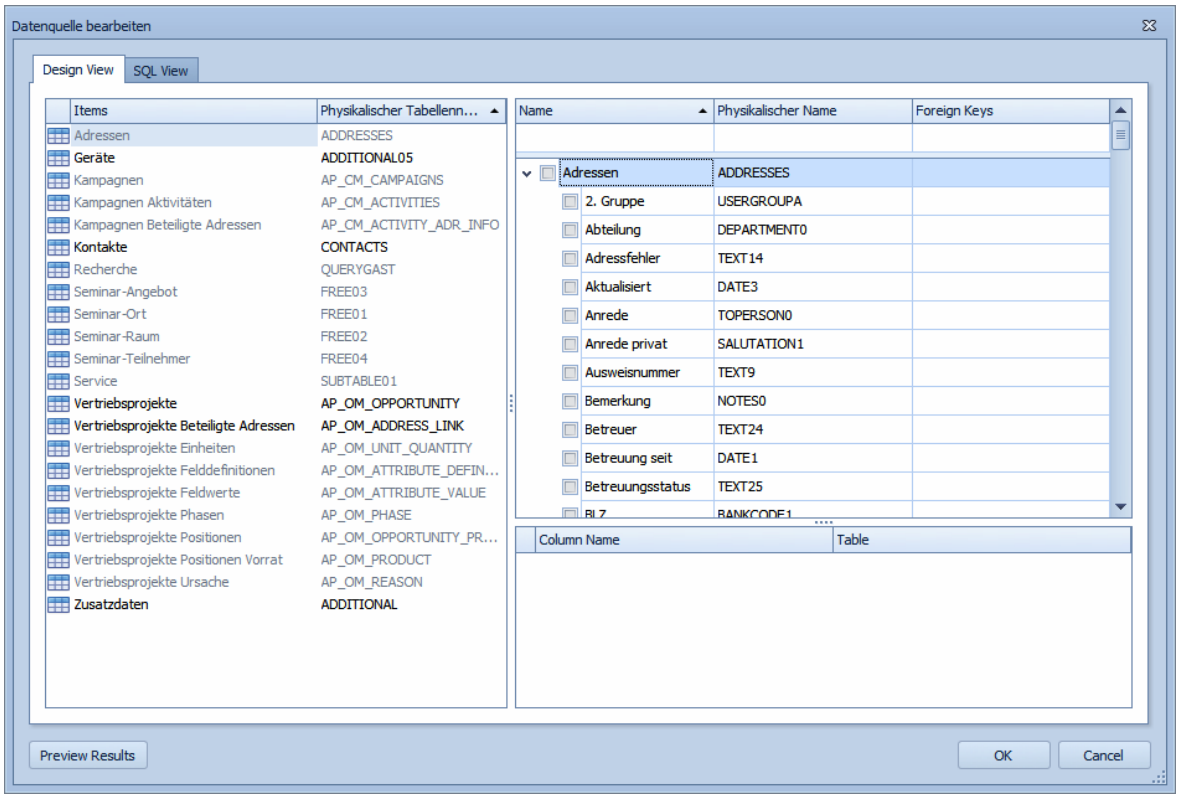
As soon as a new data source has been entered the data select dialog will appear.

Designer View



In this dialog you will see all data tables available in the database you have connected to the dashboard. Select here which data you want represented in the dashboard.

- To do so, left-click the data table required, keep the key pressed and drag the table into the top right-hand area.
- Or just double-click the data table required.

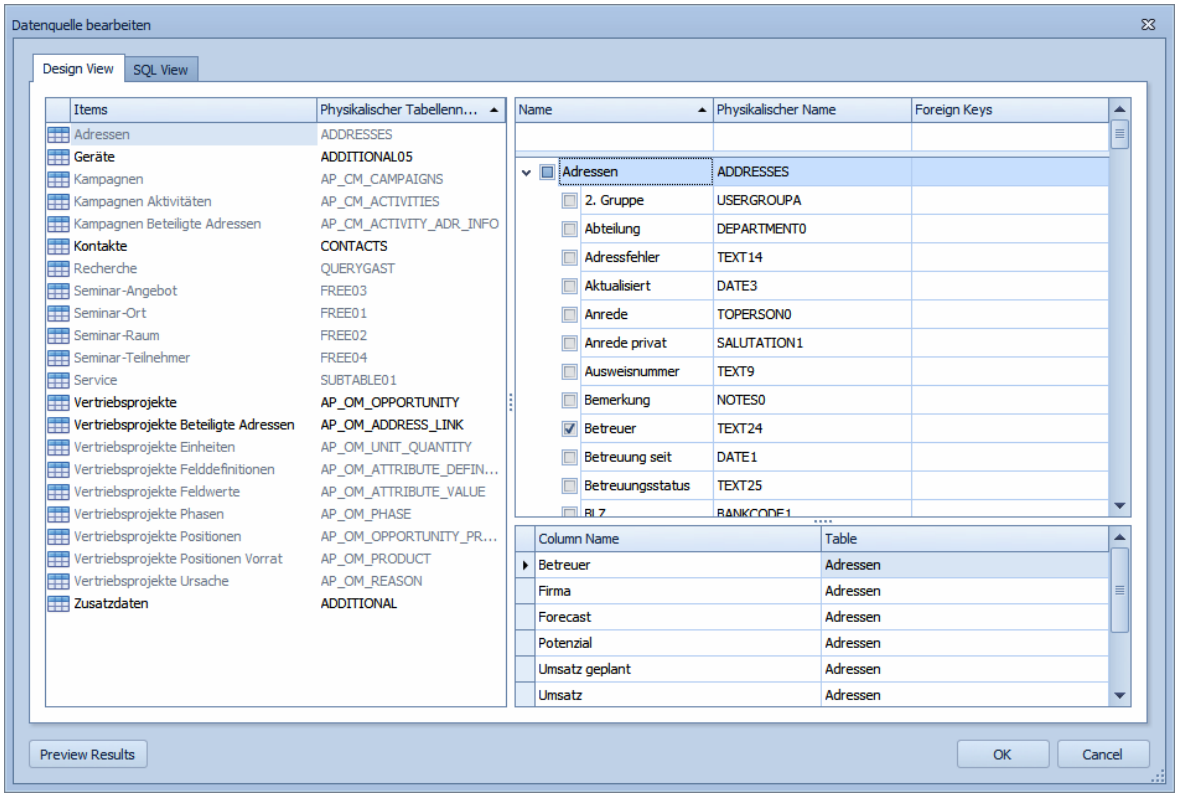


The data table and all its fields are now available for the dashboard.

- To later remove the data table from the dashboard drag it back to the overview at the left. Or right-click the data table and use the »Delete« command in the context menu.

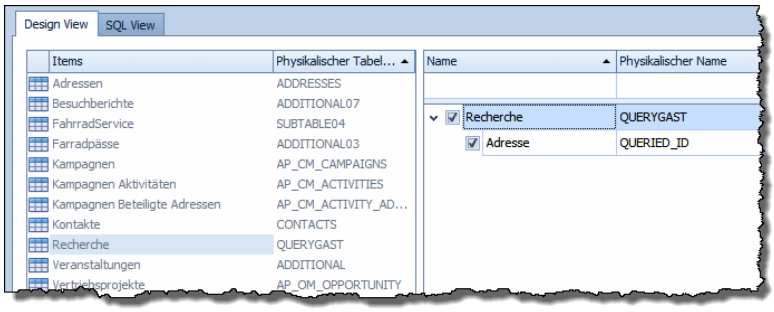
The data table fields are listed in the right-hand area of the dialog. Click here the fields you want evaluated in the dashboard.

- In the right-hand area of the dialog click those data fields you want to have evaluated in the dashboard. The data fields selected will then be listed below.



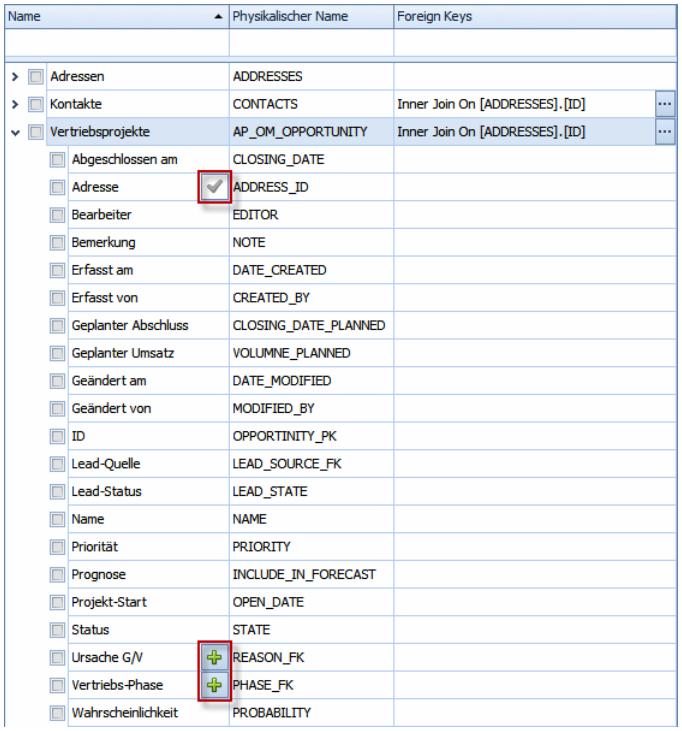
Basically, you could select all data fields and only specify in the dashboard later which fields you really want to evaluate. That would, however, slow down considerably the performance of the program. This is why we recommend to select only those data fields you will really be using later.

- The »Query« function is an exception among the data available. If you select that function, the user logged on at this moment will be entered here automatically.



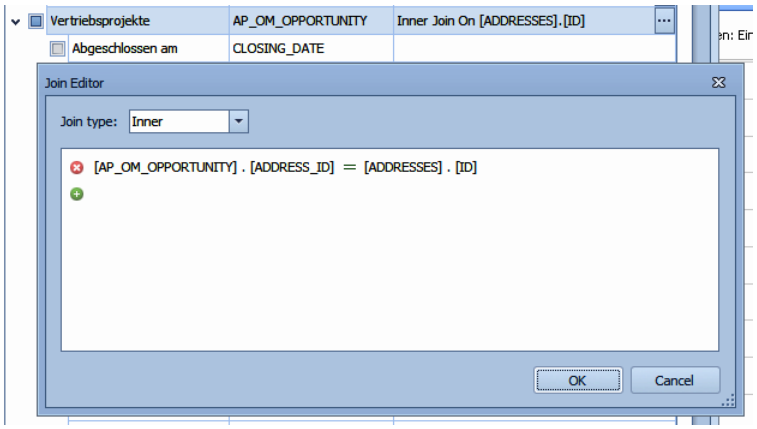
The left-hand part of the dialog has also changed. Now only those data tables will be shown that are using the data table selected as their data source. In the dialog shown above the addresses were selected first. This is why at the left only tables such as contacts and marketing projects are available for selection. They depend on addresses (e.g., a contact will always belong to an address). All the other data tables are grayed out.

For data tables dependent on other data tables specify which field represents the connection to the data source table. More than one field can be selected here.



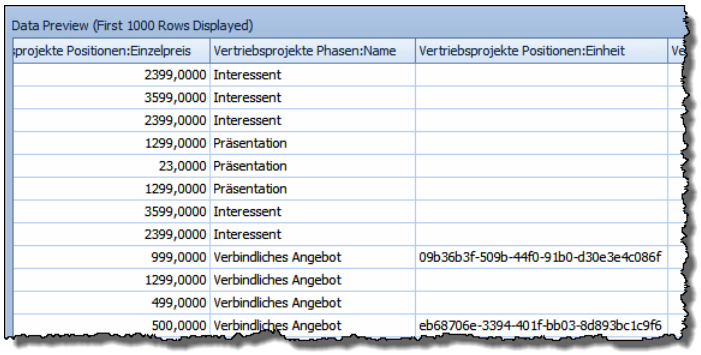
The program will offer you fields to select, but you can also specify fields of your own.

- To do so, click the select button to the right of the name of the initial data table.



Here you can specify two types of connection:

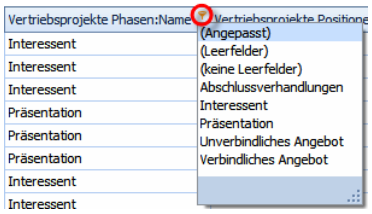
- The join type »Inner« will ensure that only such addresses will be displayed for which sales projects exist [devices, postings, or whatever].
- The join type »Left Outer« will ensure that all addresses will be displayed.
- Use »Preview Results« to access a preview. You can then see the data of up to one thousand data columns of your selection.



Data Preview (First 1000 Rows Displayed)

projekte Positionen:Einzelpreis	Vertriebsprojekte Phasen:Name	Vertriebsprojekte Positionen:Einheit	Ve
2399,0000	Interessent		
3599,0000	Interessent		
2399,0000	Interessent		
1299,0000	Präsentation		
23,0000	Präsentation		
1299,0000	Präsentation		
3599,0000	Interessent		
2399,0000	Interessent		
999,0000	Verbindliches Angebot	09b36b3f-509b-44f0-91b0-d30e3e4c086f	
1299,0000	Verbindliches Angebot		
499,0000	Verbindliches Angebot		
500,0000	Verbindliches Angebot	eb68706e-3394-401f-bb03-8d893bc1c9f6	

If you click a column header, you will see the familiar filter icon you can use to define a filter.



SQL View

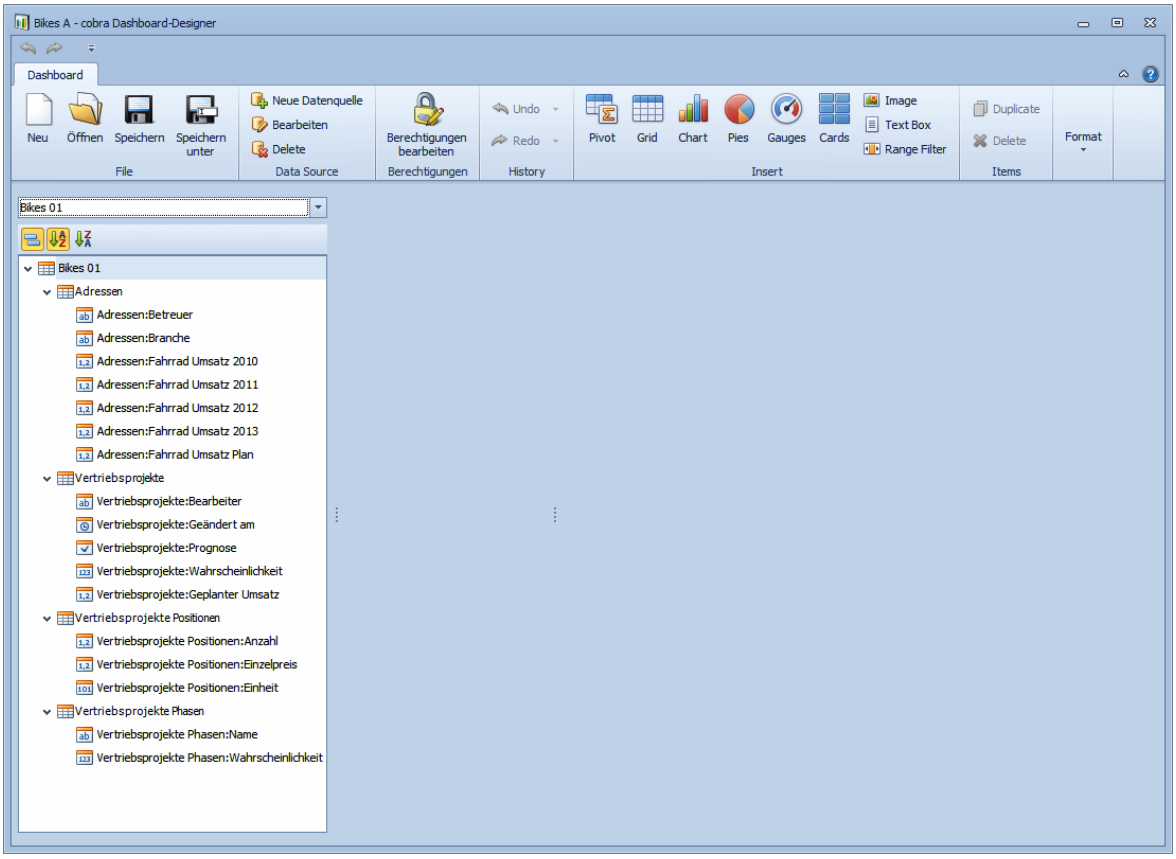
Click the register tab »SQL View« to view your data selection in SQL format.

Completing Data Selection

- Click »OK« in the »Edit data source« dialog to confirm your selection and access the Dashboard Designer itself.

Dashboard Designer

In a previous step you have selected the data for a dashboard. The Dashboard Designer now is the tool to design your evaluations. After having completed the steps described above you now see a new, empty dashboard with a data source.

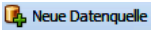


- Save the dashboard. To do so click the »Save« button.

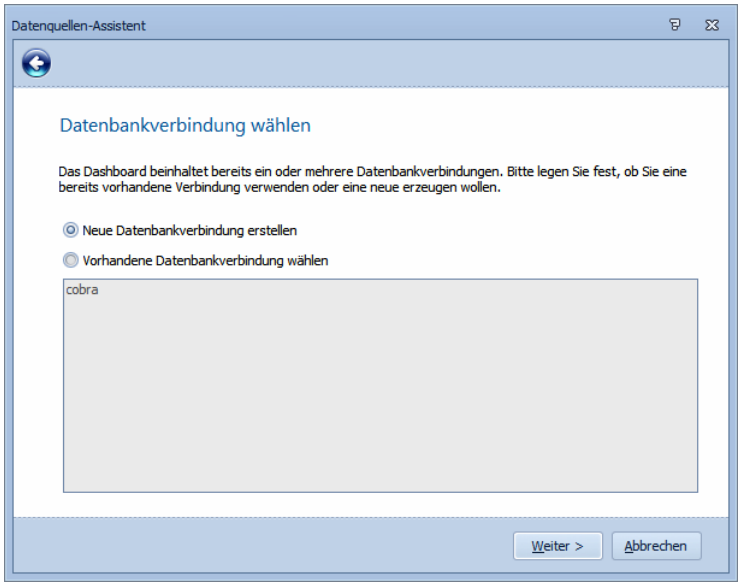
By default, dashboards are entered in your cobra installation in the \system\dashboard subdirectory. You can, however, also select a different path. They are stored as XML format files.

Entering an Additional Data Source

You can add further data sources to the dashboard. These can be data from the cobra database selected or from other applications.

- Click the button »New data source«. 

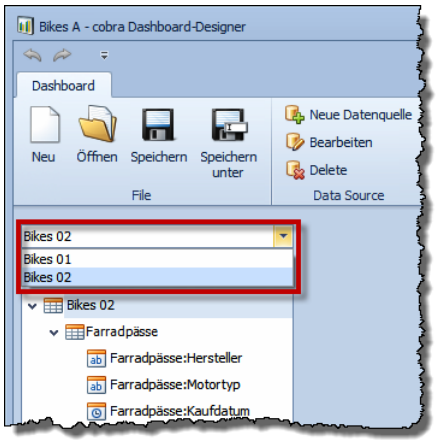
- Proceed as described for entering a new data source. Only this step will be different:



- If you want to specify another program as data source, select here »Enter new database connection«.
- Should you want to enter the existing data source (in this case: cobra) you can now select different fields from the same database. You can access fields that could not be selected initially due to interdependencies of the data tables.

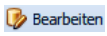
After this, configure the selection of datafields as described before.

Here you can find the data sources available in a dashboard:

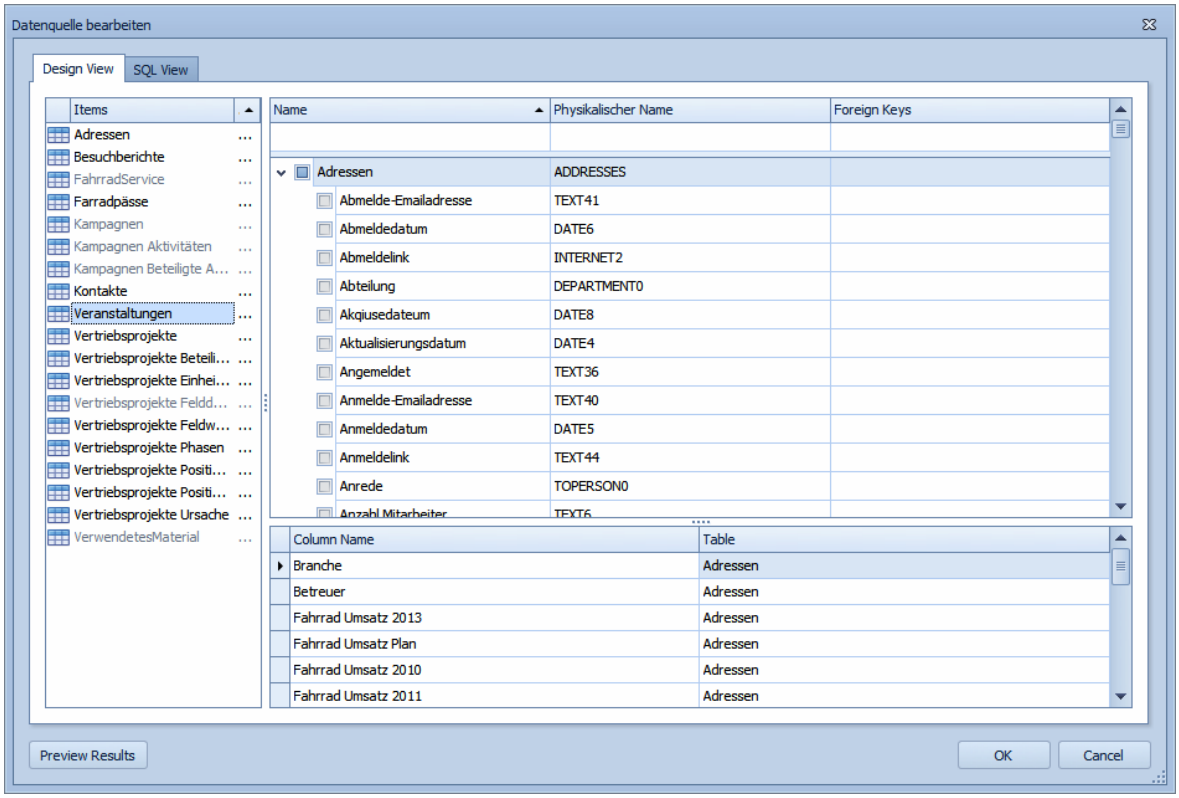


Changing the Data Selection

You can change the data selected for the dashboard at any time.

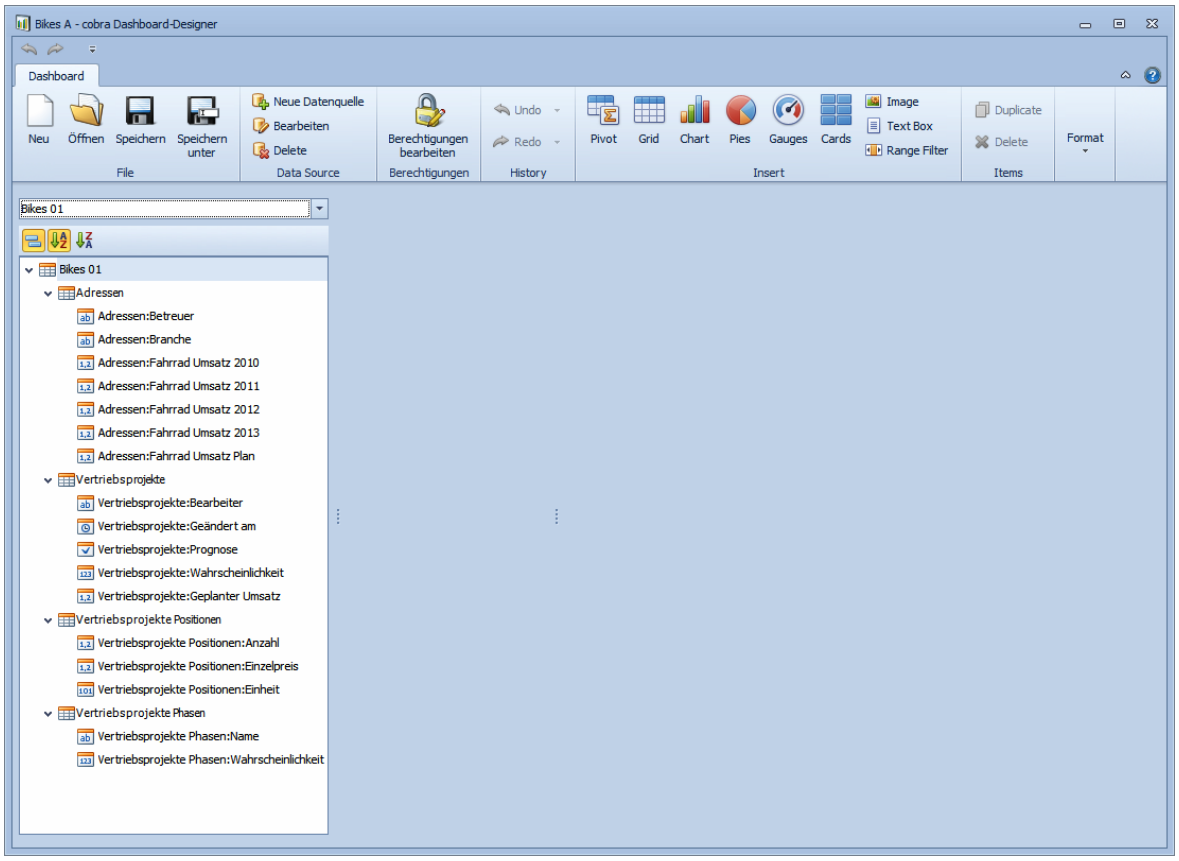
- In the »Data Source« area click the »Edit« button. 

The dialog to enter data sources will open. Here you can see the current data selection and can delete and add data.



Editing a Dashboard

An empty dashboard consists of two areas showing the data selected at the left and the work area at the right. At the top border you can also find the tools arranged in tabs. You can use the buttons to access them.



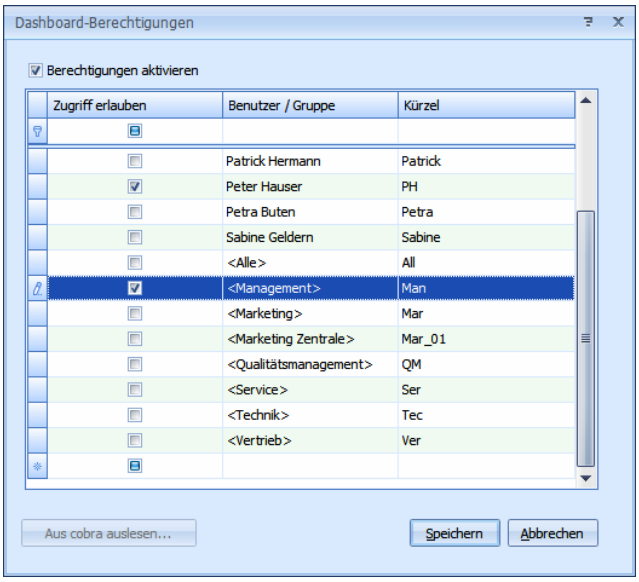
Access Rights

The dashboard function has been integrated into the cobra rights management. This is why you can determine whether all or only a few users of all the users available in cobra may access the dashboard. By default, all users may access the dashboard.

- Click the »Edit access permissions« button.

The Dashboard rights management dialog will open.

- To activate the rights management at all click the »Activate rights management« button.
- Clicking on the »Import from cobra« button will take over the users and groups entered in the cobra user administration to Dashboard.
- Click all users and groups who may view the current dashboard.



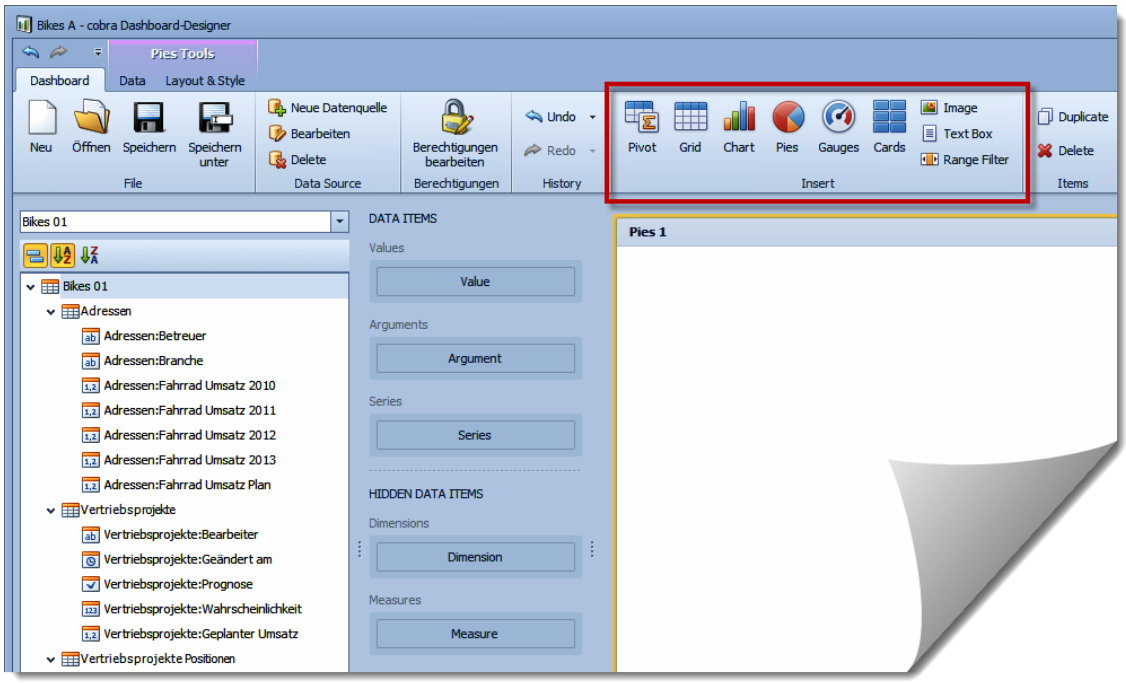
Creating Diagrams and Charts and other Dashboard Elements

Organize your evaluation reports in the work area at the right. A dashboard may contain different evaluations as well as additional elements such as texts and range filters.

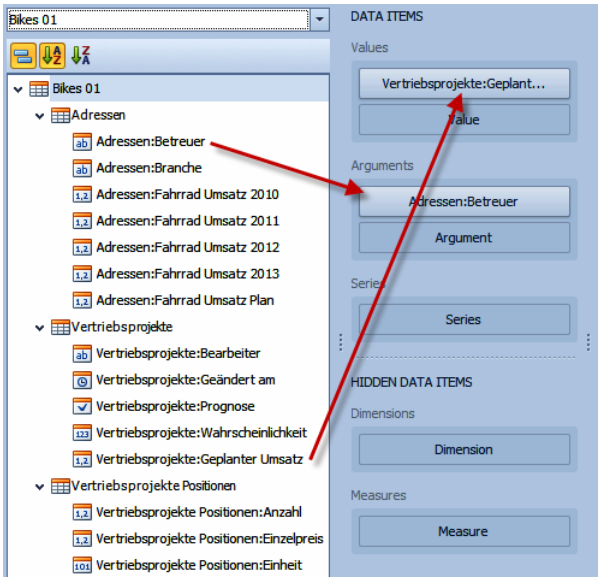
At the left-hand side of the program view there is also the control range »Data Items«, where, for every individual view, you can specify the data to be shown and other settings.

At the far left-hand side of the program view there is an Explorer view showing the data selected.

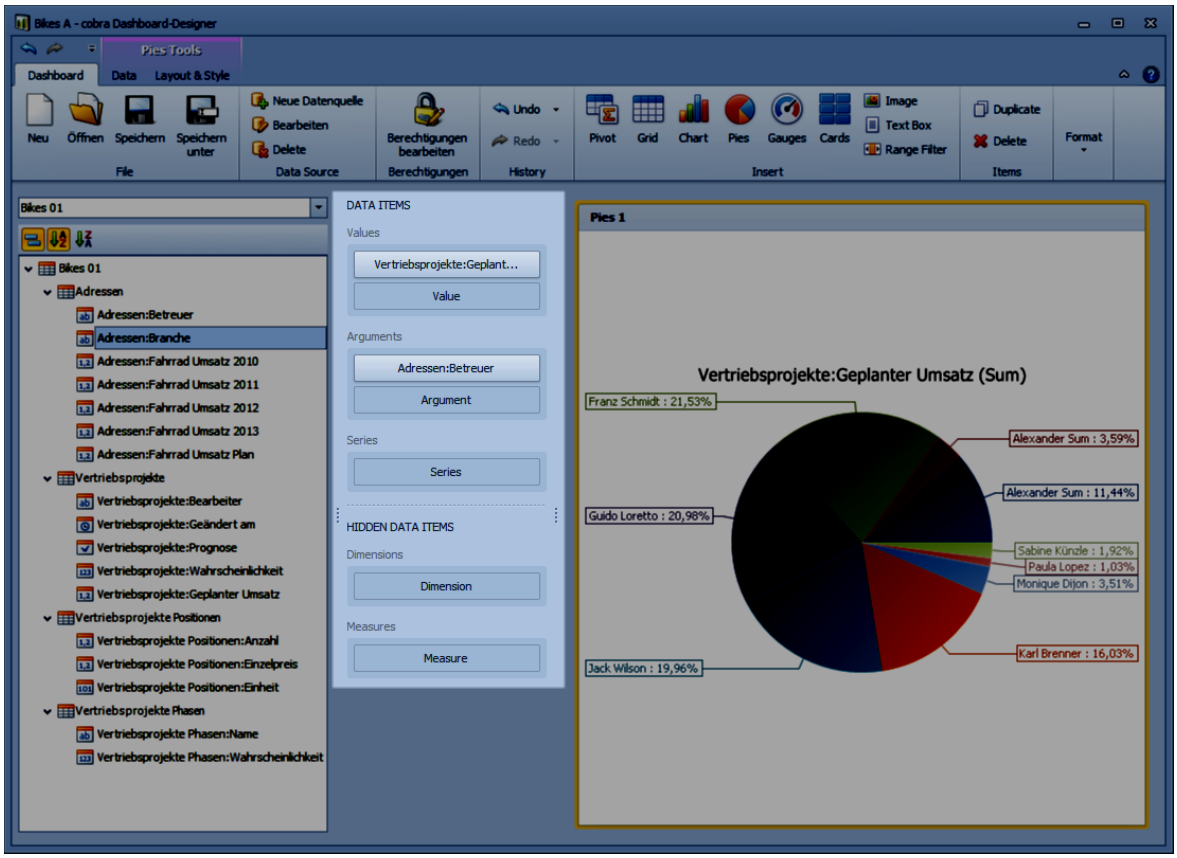
- If you click an element in the tool bar at the top, beneath »Insert«, it will be entered in the work area. In the image below this is a pie chart.



For data to be shown at all they must have been connected to fields of the data source. Every type of Dashboard items has very specific parameters: A pie chart has a specific set of values, series of data, arguments etc. A data grid will use columns, a Pivot table values, columns, and rows. Every data area belongs to a certain Dashboard element and ensures that it is connected to the data source required and that it is mapped to the correct fields of the data source.



- Drag the data fields required from the data selection at the left to the buttons of the data items. You can remove such an element again by dragging it back to the data selection.
- The »Hidden Data Items« are special. These data will not be shown in the diagrams themselves. But they can still be used as filter (dimension) and as sort criteria (measure) even though they are not visible themselves.
- To remove an element from the data items drag it back to the data selection.

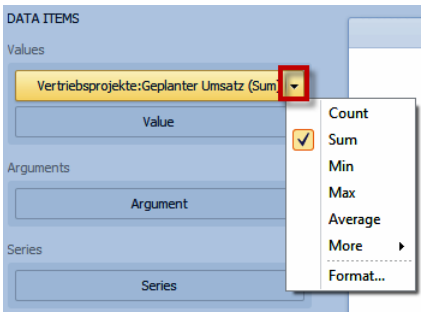


Configuring Dashboard Elements

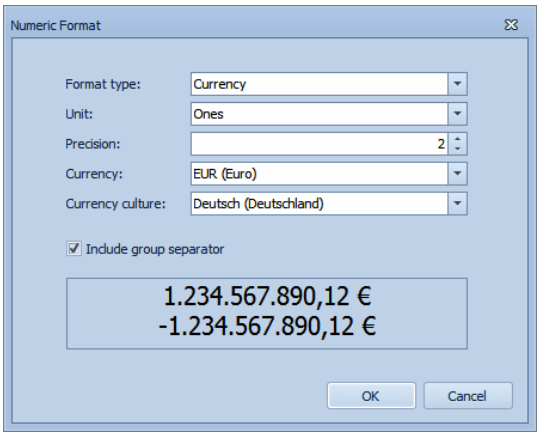
Depending on the type of the element (pie chart, Pivot table etc.) there are very different setting options.

In the Data Items Area

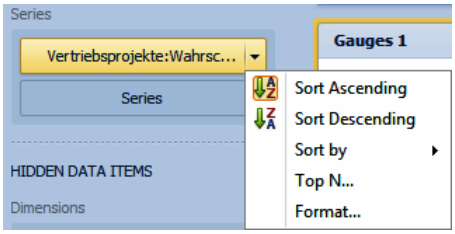
- To set and change the data functions click a field in the data items and use the list arrow options.



- »Format« will open a further dialog where you can set the number format for numeric displays.
- Use the »Group Separator« function to insert points between groups of thousands of large numbers.
- And, as with all other settings of this dialog, you will see a preview in the lower part of the dialog.

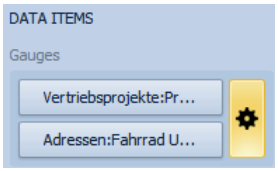


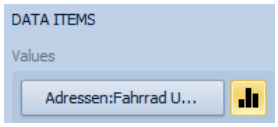
- Use the list arrow in other data items to set the sorting function. The hidden item »Measure« will also be offered for sorting here.



Depending on the type of element there are various additional options to be found in a dropdown list. Among these are sorting, aggregating, formatting and visualizing.

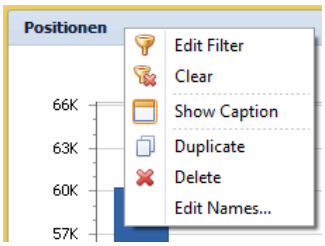
- Use the list arrow button besides the data items and hidden data items to access these options.





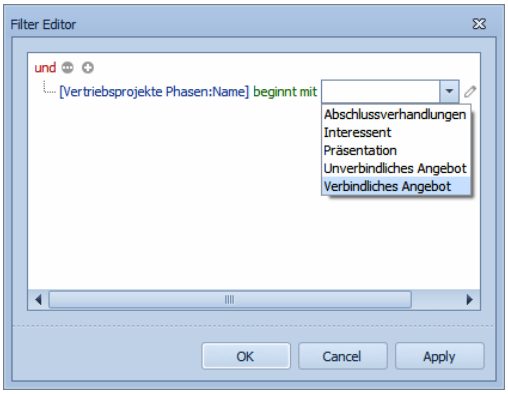
On the Work Area

By right-clicking an element you can use the context menu to enter settings.



The following settings are valid for most of the diagram and chart types. Some diagrams and charts also have additional options:

Edit Filter ..... Set a filter for the data to be displayed.



To set filters you can also use those data not displayed that are available as »Hidden Data Items«.

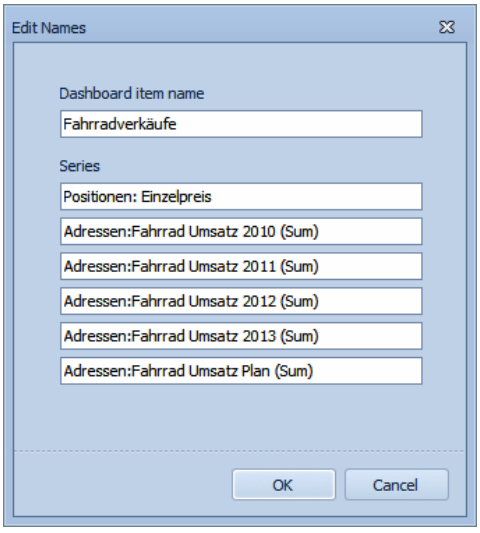
Clear ..... Clear a filter set previously.

Show Caption ..... Show and hide the caption of an element. Define the caption in the same context menu using »Edit Names«.

Duplicate..... Duplicate an element on the work area that you can then edit.

Delete ..... Delete the element from the work area.

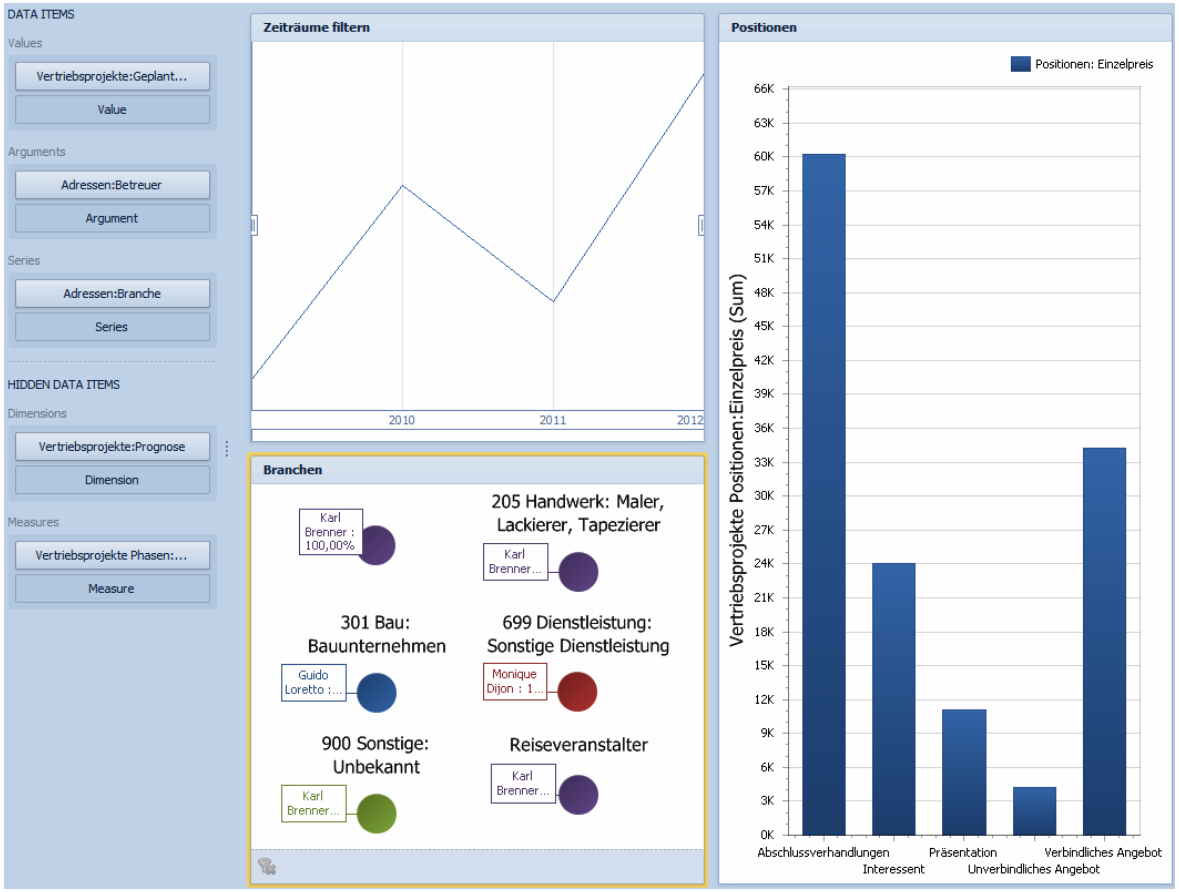
Edit Names..... Enter different texts (names) depending on what the element contains.



The »Item Name« is the diagram heading, the other entries are the captions of the data elements.

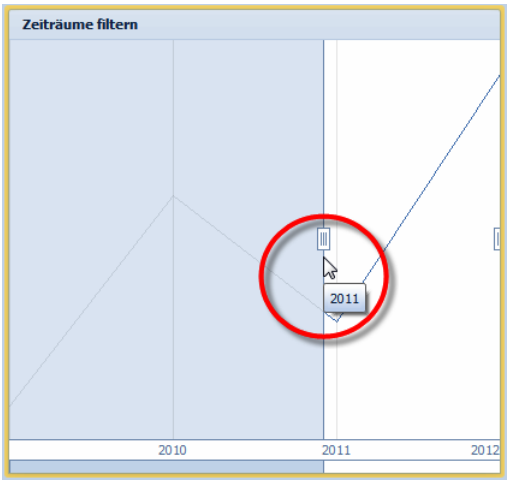
Settings for Range Filters

Such a filter will allow you to filter interactively a specific data area using, e.g., two slide controls.

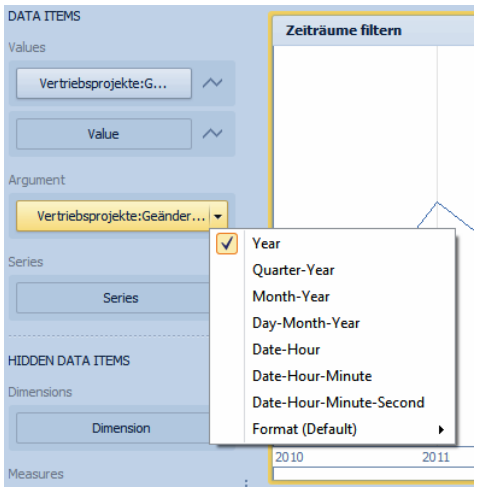


Here you can see a range filter »Filter Periods« which you can use to define a certain period. This setting will affect all other diagrams shown. This means that if you alter the area to be evaluated in the range filter, the diagrams and charts will only show data from the period set previously.

- If you alter one or both of the slide controls, the other diagrams will automatically take over this setting.



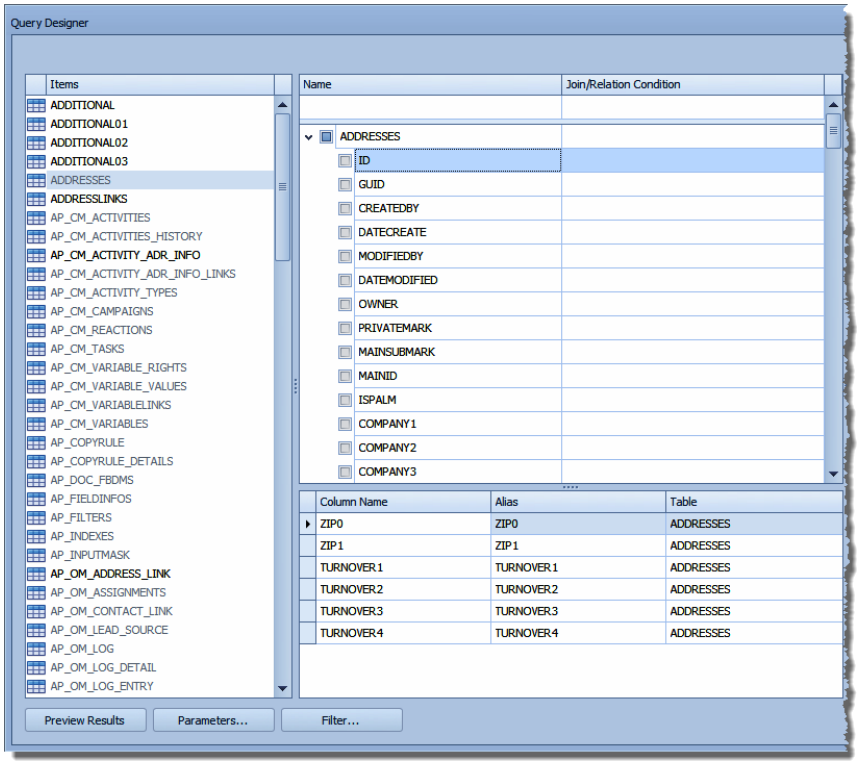
- Use the data items to specify which periods can be filtered here.



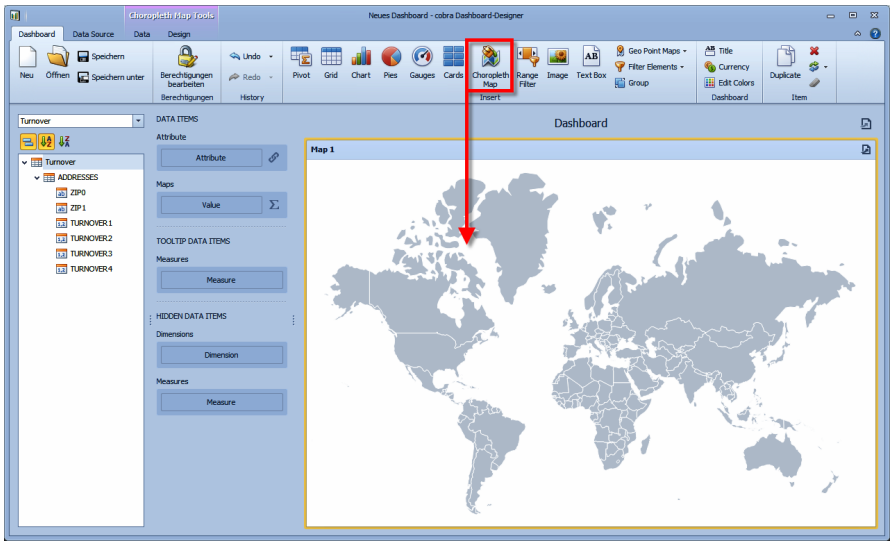
Settings for choropleth maps

You can use digital map files of the *.SHP format for choropleth maps and evaluate data geographically. In the following example turnovers are displayed in accordance with the ZIP code.

- Create a new data source. Enter at least a ZIP code field as well as a turnover field in the Dashboard.



- Close the data source definition.
- In the Dashboard Designer create a choropleth map.



The choropleth map is loaded with a default map.

- Right-click this map.
- In the context menu, click the »Import map« command.

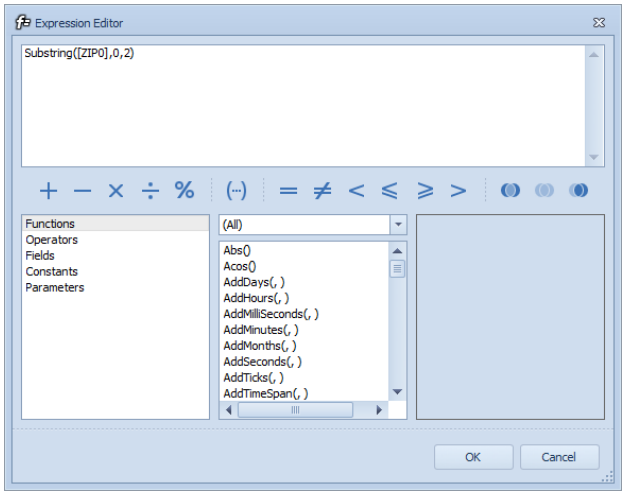
In the system directory of your installation there is a subdirectory \Shape Files. In this subdirectory are maps that we have included.

- Select the D-PLZ2 map. The German ZIP codes are arranged here according to the first two digits of the ZIP code (German: PLZ). (In the also included map D-PLZ1 the ZIP areas are only arranged according to the first digit of the code).

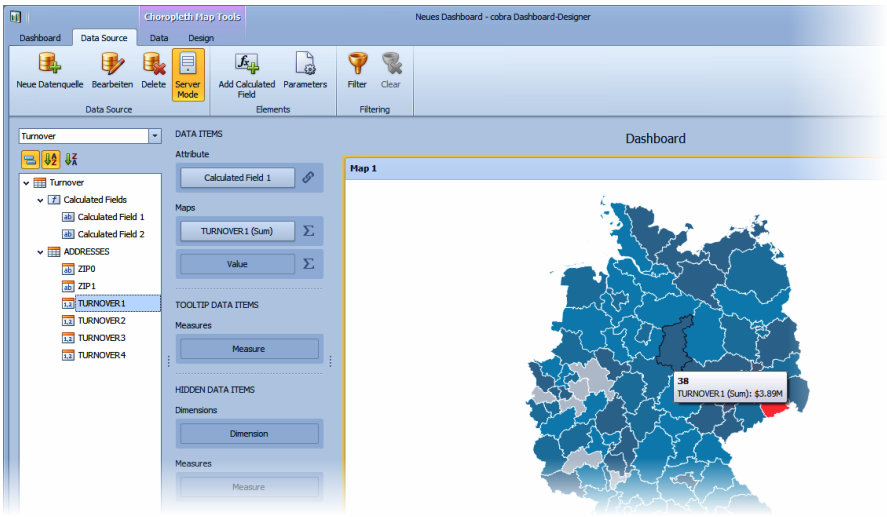
The map is loaded into the Dashboard Designer.

In the next step create a calculated field. Aim of this field is to calculate the postcode to two digits exactly.

- In the Dashboard Designer ribbon go to the register »Data source«.
- Click the »Add calculated field« button. Enter the formula shown. (For the D-PLZ1 map you must enter a 1 instead of the 2).



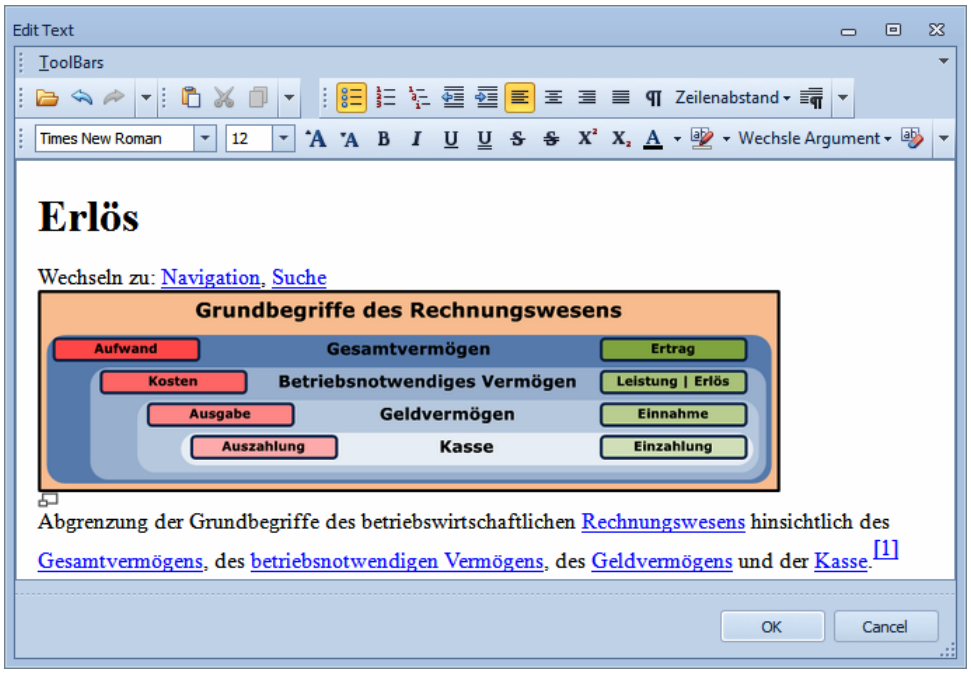
- Confirm with »OK«.
- Drag the calculated field to the attributes in the data elements.
- Also drag the turnover there at »Maps«.
- Turnovers will be displayed according to the ZIP areas. If you hover over an area, a tooltip pops up with the value calculated.



Settings for Text Elements

The text element »Text Box« contains informing texts of optional type and length.

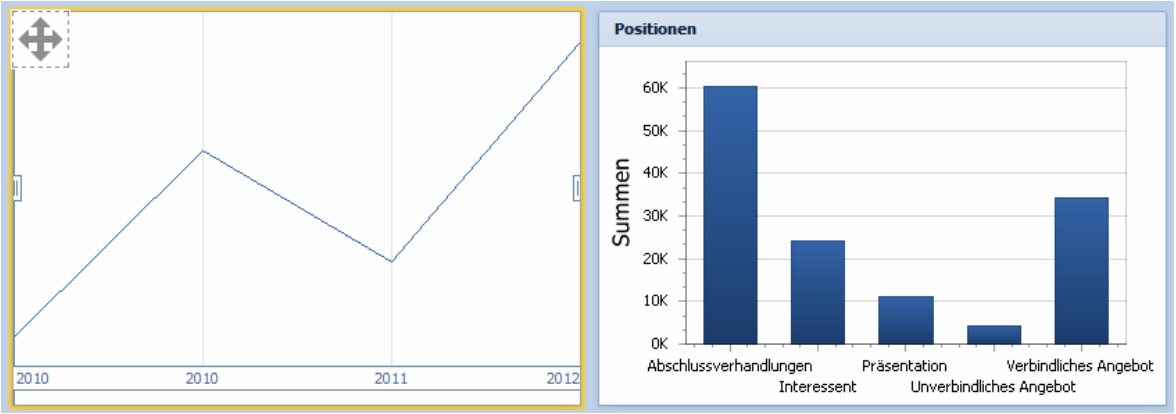
- Right-click the textbox and use the »Edit« command from the context menu. Use the texteditor to enter and format the required text.



Changing the Position of the Elements

You can move the elements on the work area back and forth by keeping the mouse button pressed.

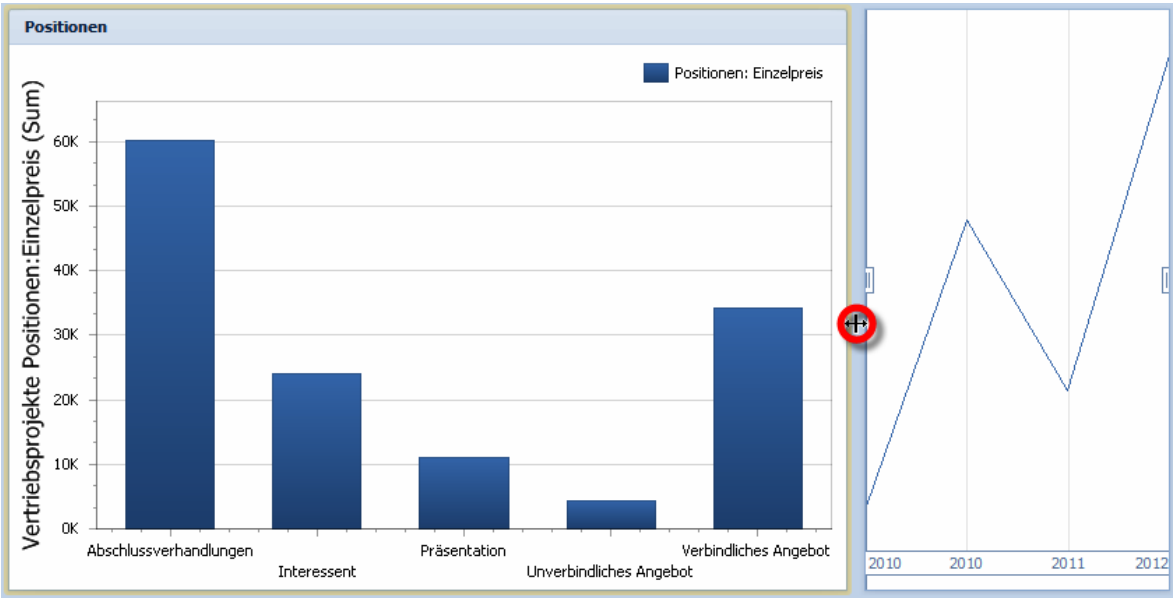
- Grab an element at its caption and drag it, keeping the mouse button pressed, to a different position on the work area. Should the element not have a caption, a cross will appear where you can grab it.
- A colored mark will show you where you can embed the element.
- When you release the mouse button, the element will be pasted at that position.



Changing the Size of the Elements

Elements are arranged automatically in rows and columns. You can, however, change width or height of the elements within this arrangement. The size of the other surrounding elements will be adjusted automatically.

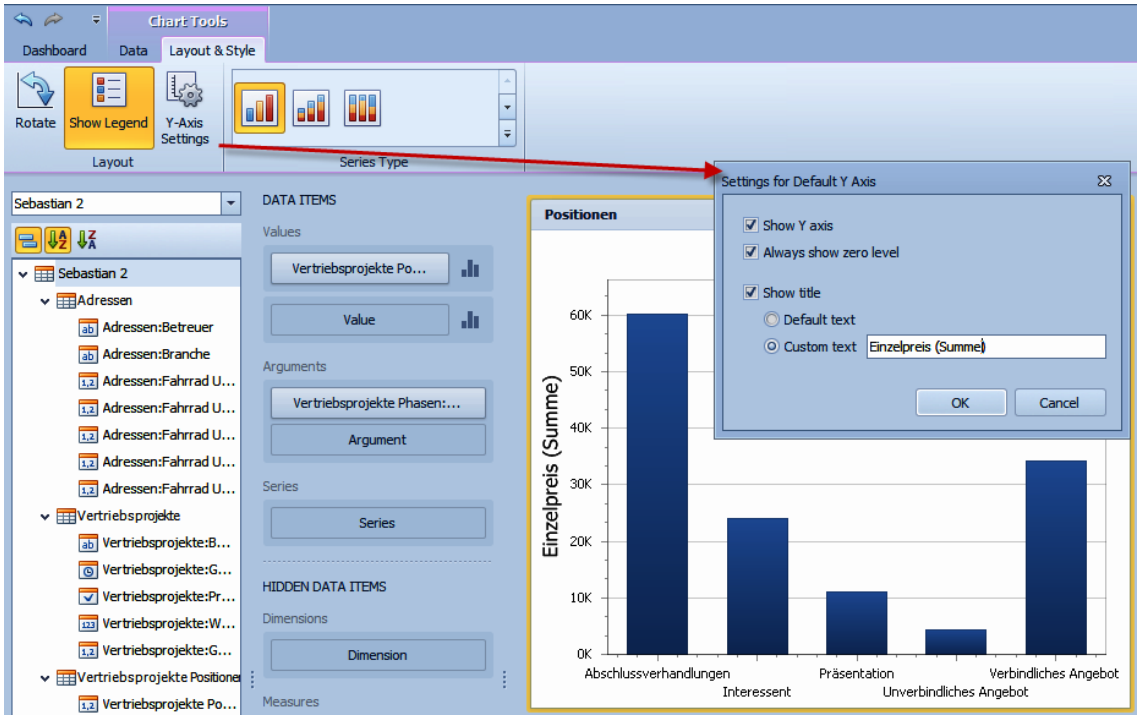
- Click between two elements and drag them with the left mouse button to be as wide or long as required.



Changing Layout and Caption of Diagrams

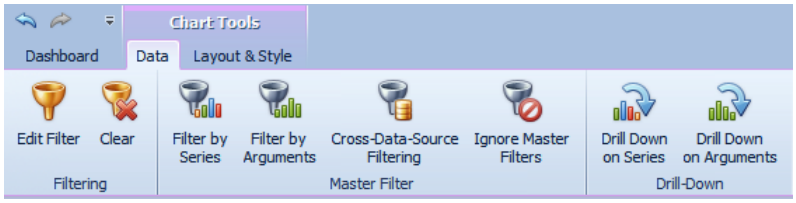
The options you have here will, of course, depend on the type of diagram or other element.

- Click an element on the work area.
- Switch to the »Layout & Style« tab (the example shown deals with a Gantt chart).



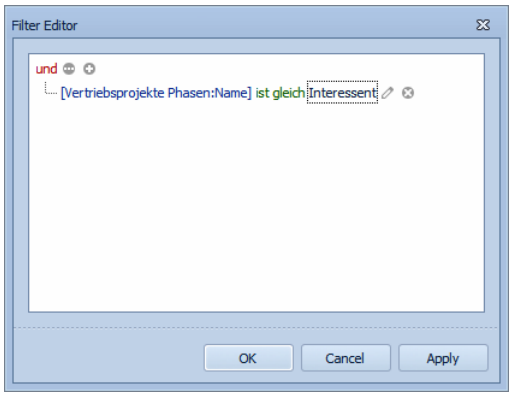
Filtering Data

The register tab »Data« offers additional options for filtering. However, these apply only to the element currently marked on the work area.



Filtering

Use the »Edit Filter« button to access the familiar filtering options you can also reach via the context menu of the element itself.

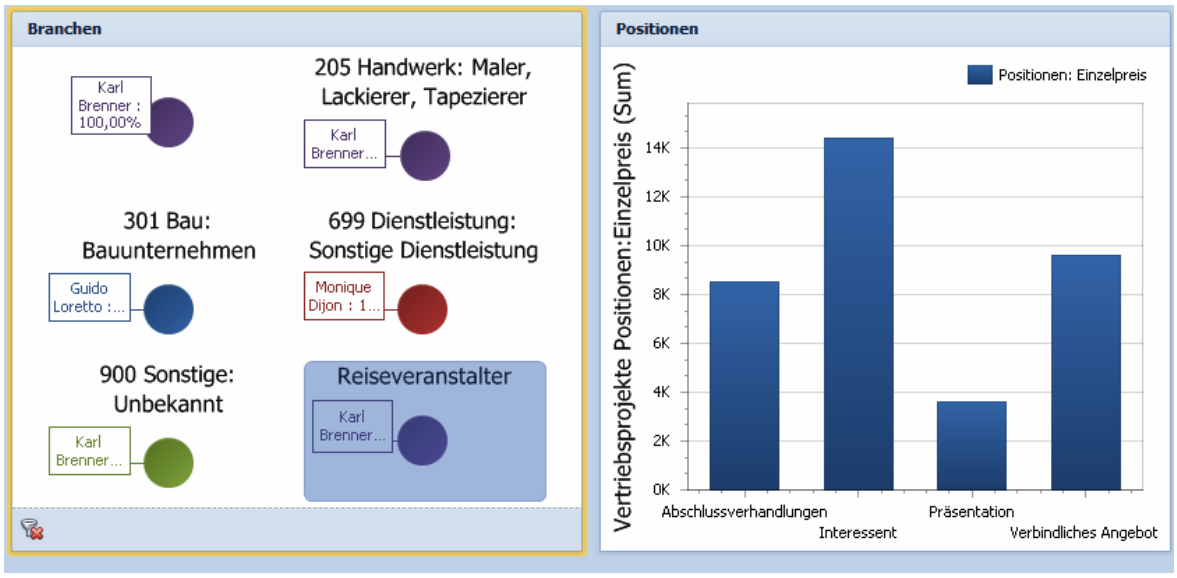


- To deactivate the filter click the »Clear« button.

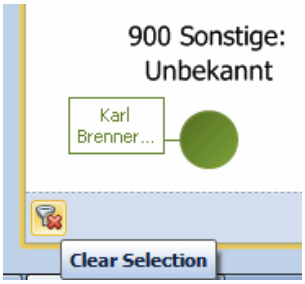
Further Options

You may not only use range filters to limit data areas, in certain charts you can also display only such data that you have marked explicitly in another chart.

In the example shown you can see that the entry »Travel agency« has been marked in the left »Line of business« diagram. In this case, only data belonging to this entry will be displayed in the Gantt chart to the right.



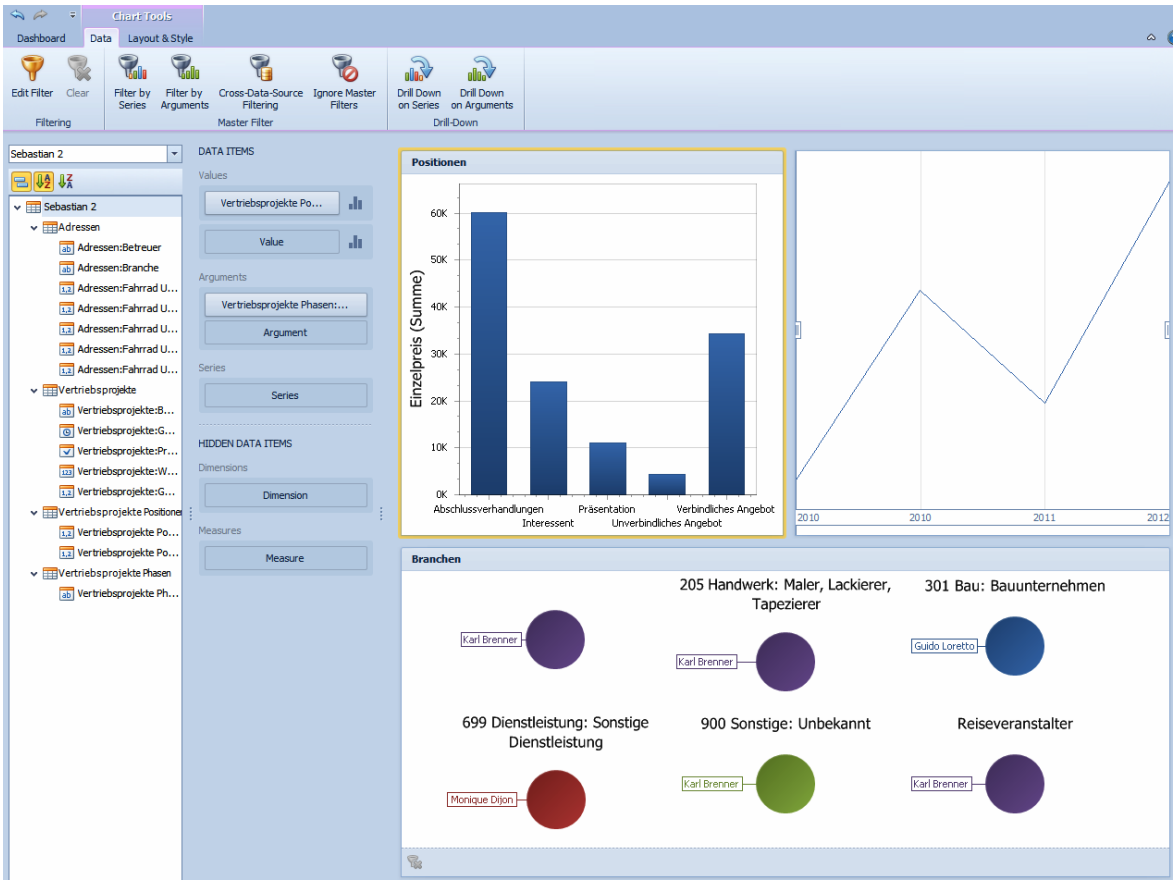
- You can deactivate such a mark by clicking the »Clear Selection« button below left.
- This button is inactive as long as no entry has been marked in the diagram or chart it belongs to.



Filtering According to Series/Arguments

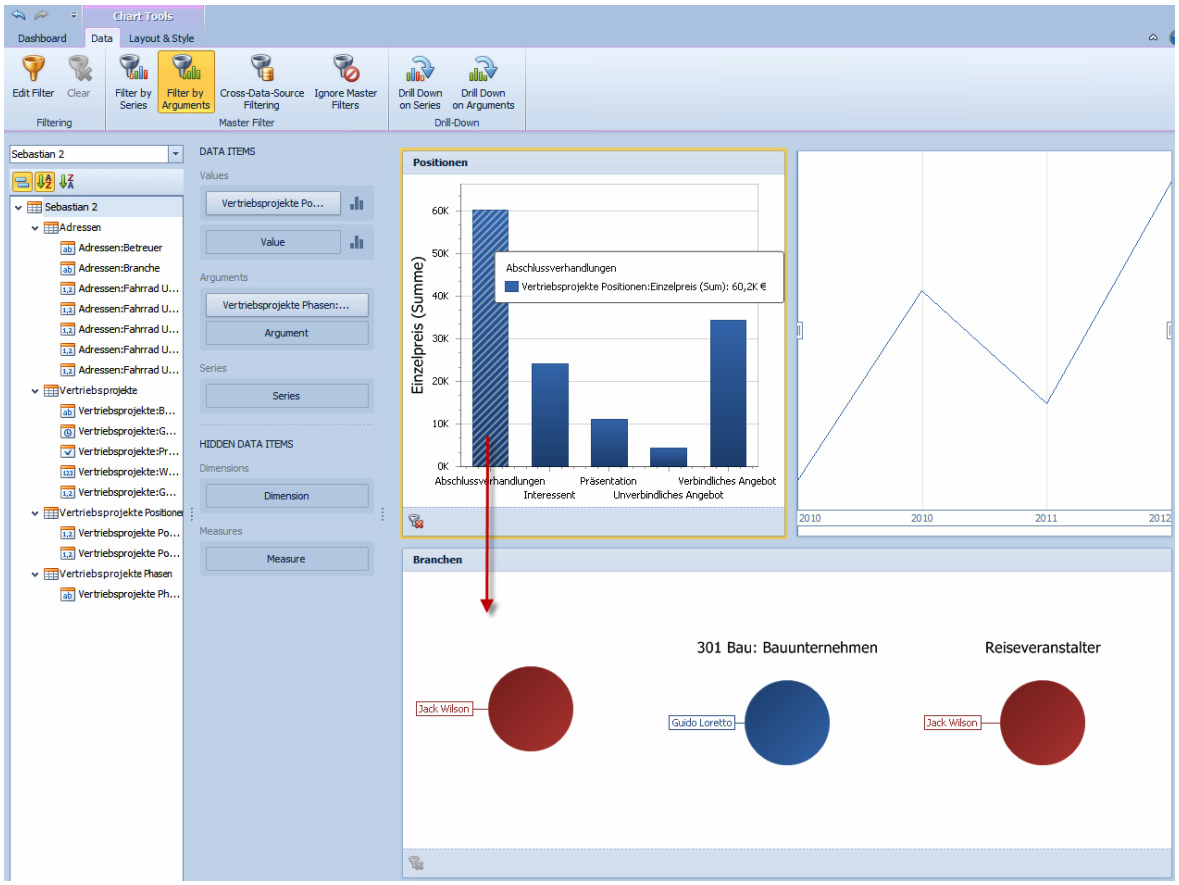
Arguments and/or series must have been defined in an element previously.

You can use this function to ensure that in all diagrams or charts only such data will be displayed in the work area that belong to an argument or a series marked by you previously.



- In the example shown the »Positions« chart has been marked.
- Click the »Filter by Arguments« button.
- Now mark one of the arguments (i.e., one of the blue bars) of the positions. These bars represent sales stages.

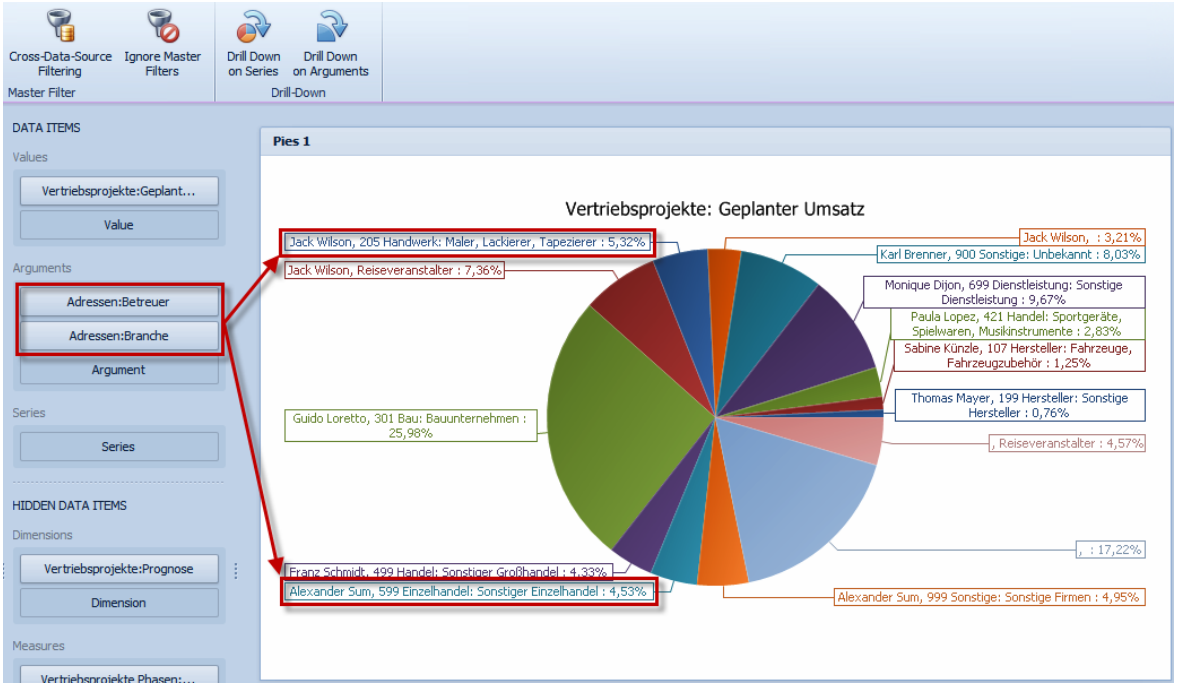
- As soon as you mark it, this bar is hatched and the »Line of business« diagram below will now only display such businesses for which negotiations at this stage of sales have been entered.



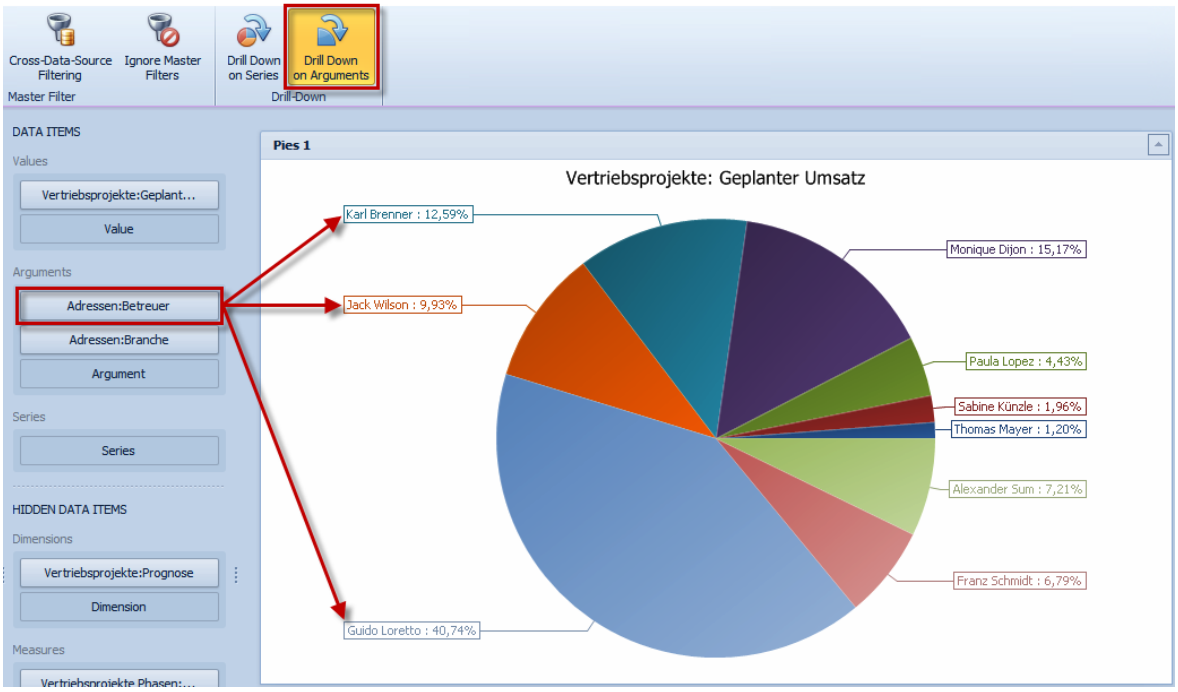
Displaying Details

Under certain conditions you can access interactively the details of a certain entry within a chart by, e.g., clicking a sector of a pie chart. Preqeuisite would be that, as arguments, you have entered data from highest to lowest (year - half year - quarter), or as series e.g. category - sub-category - product (i.e., from the least itemized to the most itemized).

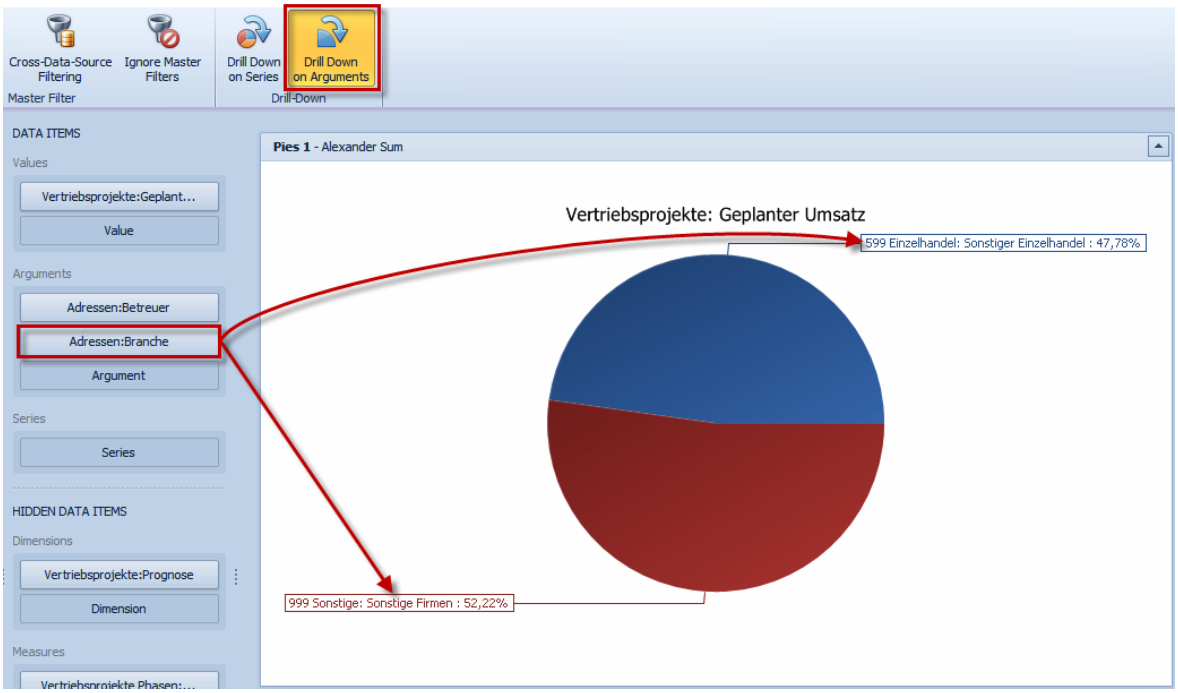
- In the example shown below you can view the list of projected sales arranged according to sales managers and to lines of business.



- Now click the »Drill down on Arguments« button. Projected sales are sorted according to account managers.
- Use the top right button to go back to the previous view.



- If you now click the »Alexander Sum« sector, you will see what this sector is composed of.

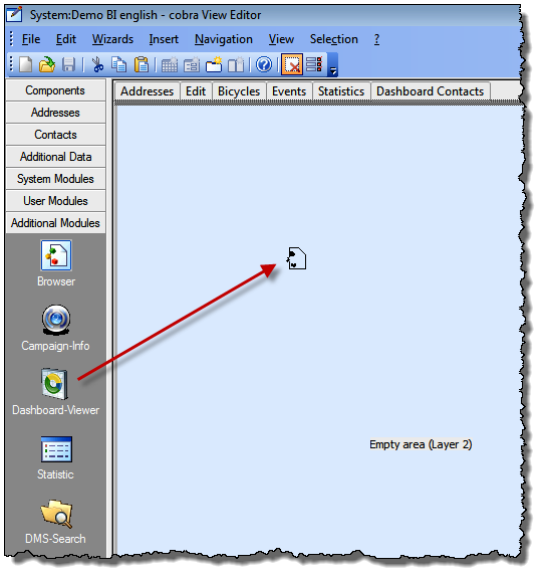


- If you now click the »Drill down on Arguments« button you will be back in the first view and that button at the top right of the chart will disappear again.

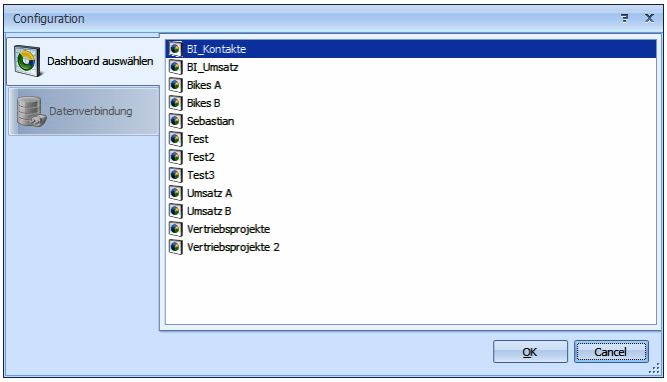
The Dashboard Viewer

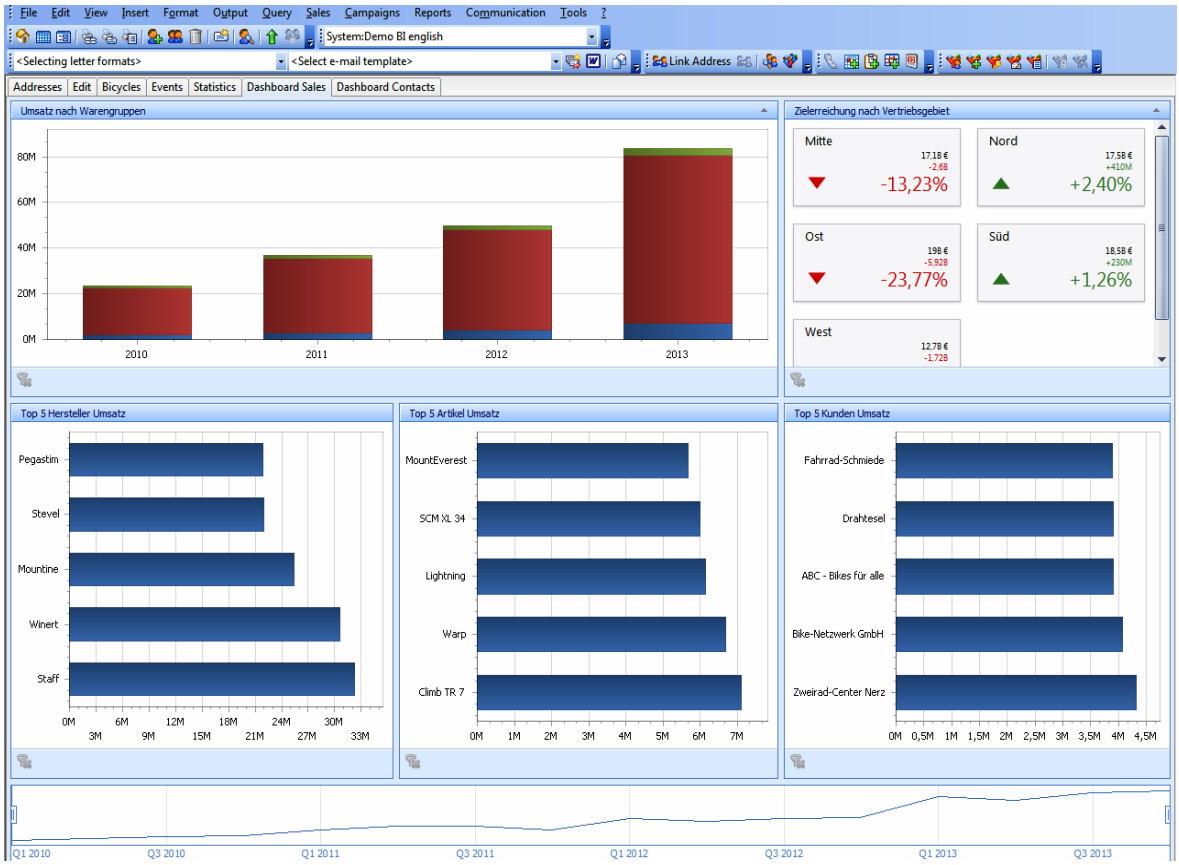
The Dashboard Viewer is a view element linked to a dashboard and showing it directly in cobra. The system administrator integrates the Dashboard Viewer into one or more cobra views.

- Open the cobra view editor.
- If required, create a register tab for the Dashboard.
- Use the mouse to drag the Dashboard Viewer element from the »Additional modules« area to a free area of a view.
- If you release the mouse button now, the Dashboard Viewer will be positioned in the view.



- The Dashboard Viewer configuration dialog will open.
- Select which dashboard you want displayed in the view.



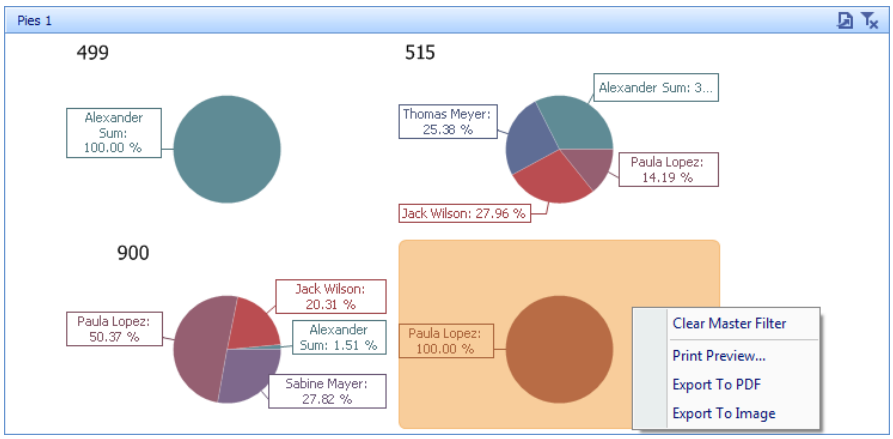


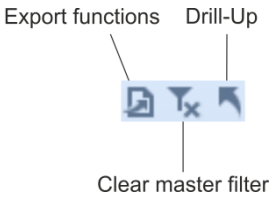
If something is changed in a dashboard in the Dashboard Designer, such changes will only be visible in the Dashboard Viewer

- if cobra is started again
- or you have issued the command »View: Refresh View« (Ctrl+F5) while cobra is operating.

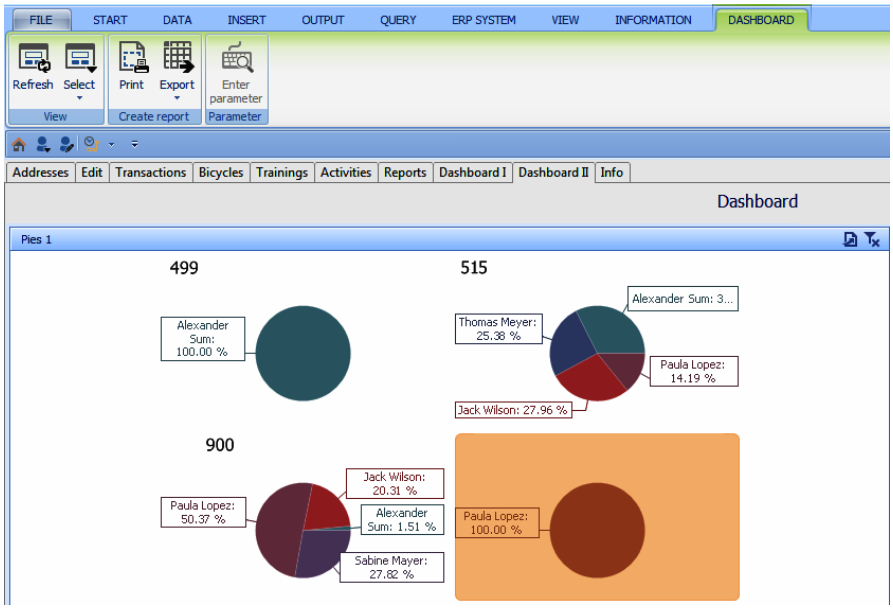
Context menu and context page

In the Dashboard Viewer in cobra you can access some central functions for your daily work via a context page as well as a context menu that you open by right-clicking it.





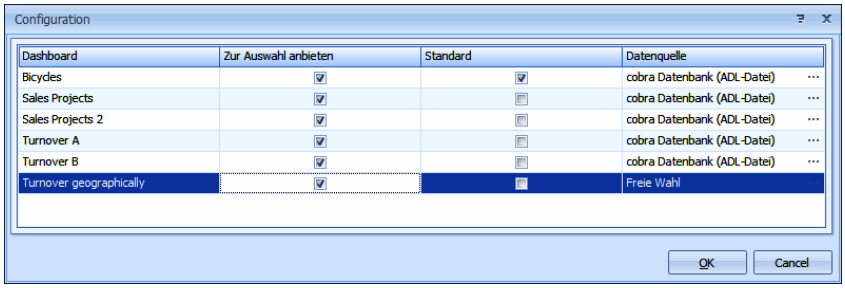
The context page will also allow you to access Dashboard functions.



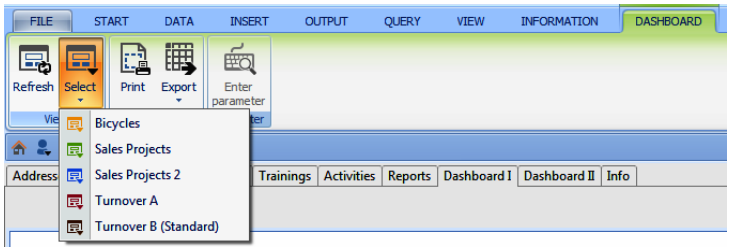
Use the »Refresh« function to refresh the Dashboard view. This function is quicker than refreshing the complete view via the Ctrl+F5 shortcut key.

For the »Selecting« function a preselection must be done in the view editor.

- Load the view in the view editor.
- Double-click the view element.
- Right-click the context menu and from the context menu issue the command »Properties«.
- Go to the »Extended settings« register. Click the »Configure« button.
- Select which Dashboards you want to be available for selection in this view element.



- Select that Dashboard that is to be shown as »Default« as long as no other one has been selected.
- If a user clicks the »Select« button in a Dashboard view element, the Dashboards assigned to him will be offered for selection.



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