Kahua Quick Reference Guide
Dashboards

About Dashboards

A Dashboard is a domain-level application that pulls data from a variety of applications to present visuals in widgets that contain charts, count tiles, and lists. The primary purpose of a dashboard is to present information in a variety of visual formats for decision-making on action items and reporting.

Features of Kahua Dashboard include:

- Predefined widgets and user-defined widgets for most Kahua applications
- Ability to create one or many dashboards that will automatically update using data based on project selected
- Click-through functionality to view the corresponding record(s) in the application
- Advanced filtering capabilities to refresh dashboards to display data based on status, a specific company etc.
- Quickly print dashboard pages to PDF
- Sharing dashboards using Kahua's groups functionality (admin or moderator only)

Important Notes

- Depending on the selected project domain, a dashboard will only have information for the projects or child partitions within the selected domain.
- Dashboard information is permission driven. A user will only see the information they have access to.
  - If a user does not have specific applications, dashboard widgets will block access to the data and display a message.
  - If a user does not have access to specific projects, dashboard widgets will not pull in the projects' data.
- Dashboards can be created for personal use.

- Dashboards can be shared with groups in the domain at the administrator or moderator permission level.

Navigate to Dashboard

1. Navigate to a partition (ie. Region XX) using Project Finder on the left side bar.

   Note: A user will only see the information to which they have access.

   **Note:** A dashboard will have information only for the children projects within the selected partition.

2. Once in the desired partition, click **Dashboard** located on the left side bar.

3. Use the Dashboard Selector dropdown list to navigate through the preconfigured dashboards or create a dashboard for personal use.

Create a Dashboard

1. While in the dashboard application, click the Dashboard Selector dropdown list.
2. Click **Add Dashboard** to open the Configure Dashboard box.
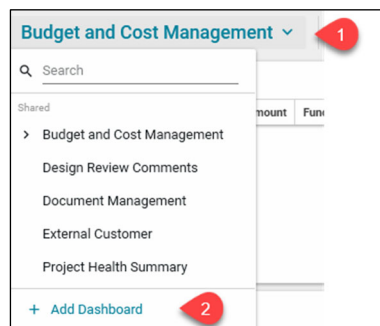
3. Enter a 'Name' and click the **Save** button.
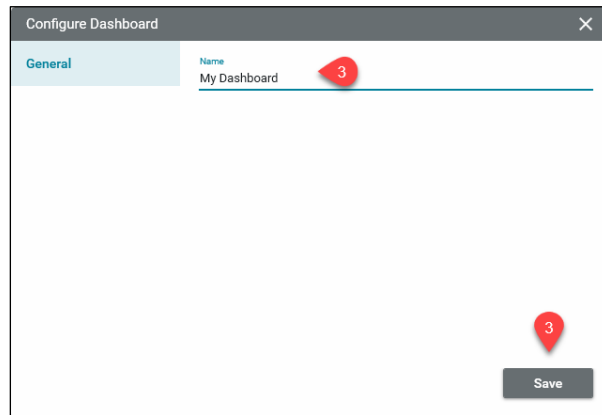
4. Click the **Add Widget** button to select one of the widget options:
   - Charts
   - Number Tile
   - List View
   - Predefined Charts
   - Predefined Number Tile

Once a widget type is selected:
5. Choose an application from the **App** dropdown list.
6. Select a view (i.e., Default or a log view that was created in the source app).

   Note: This can auto populate the Name, Group By, and Calculation fields. If necessary, these fields can be changed.

7. Enter the name.
8. Select the type of widget in the Widget dropdown list.
9. Optional: Turn on **Include Data from Child Partitions**.
10. Select the grouping in the **Group By** dropdown list.
    a. If a grouping needs to be added, click **Add Grouping**
11. Select the calculation type from the Calculation dropdown list.
12. Select the vertical axis type from the Vertical Axis dropdown list.
13. Optional: Turn on **Rotate Labels**.
14. Optional: Turn on **Horizontal**.
15. Once complete with filling out the information, click the **Save** button. Your dashboard will be saved under **My Dashboards** in the Dashboard Selector dropdown list.

Edit a Widget

1. After ensuring that you are in the appropriate domain, navigate to "Dashboard" on the left side bar.
2. Using the Dashboard Selector dropdown list, click on a dashboard under **My Dashboards**.
3. Navigate to the top right-hand corner of the widget you wish to edit and click the **More** button, which is represented by three vertical circles.
4. Click **Edit** to make any changes to the widget.
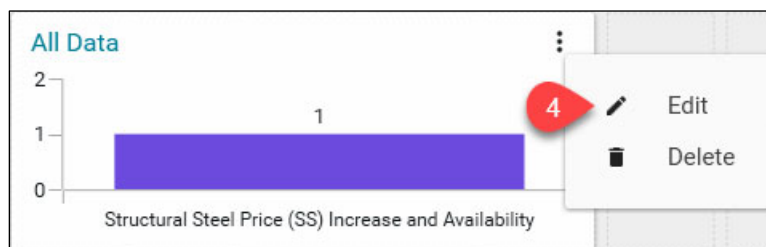
5. Click **Save** at the bottom to save changes to the widget.
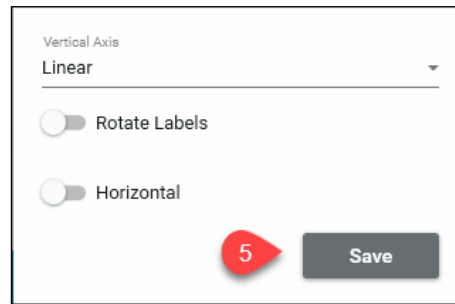
6. Click **Save** in the top right corner to save changes to the dashboard.

Add Another Widget to a Dashboard

1. After ensuring that you are in the appropriate domain, navigate to "Dashboard" on the left side bar.
2. Using the Dashboard Selector dropdown list, click on a dashboard under **My Dashboards**.
3. Click the **Edit** button, which is represented by a pencil icon, next to the printer icon.
4. Click **Add Widget** to add additional widgets to your dashboard.
5. Once the additional widgets are added to the dashboard, click **Save** in the top right corner to save changes to the dashboard.
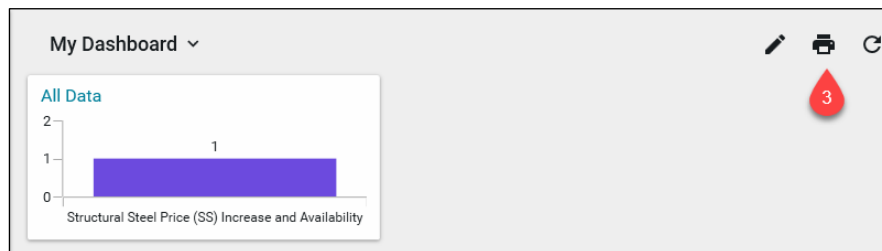
Delete a Widget

1. After ensuring that you are in the appropriate domain, navigate to "Dashboard" on the left side bar.
2. Using the Dashboard Selector dropdown list, click on a dashboard under **My Dashboards**.
3. Click the **Edit** button, which is represented by a pencil icon, next to the printer icon.
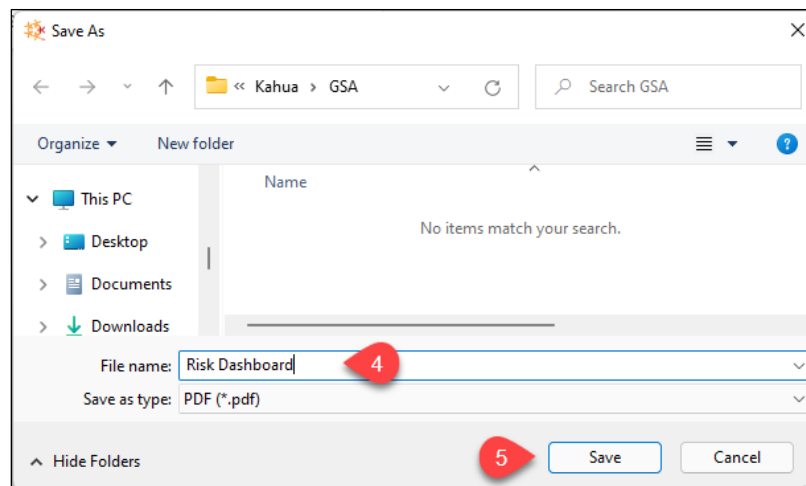4. Click **Delete** to delete the widget from your dashboard.

Print a Dashboard to PDF

1. After ensuring that you are in the appropriate domain, navigate to "Dashboard" on the left side bar.
2. Using the Dashboard Selector dropdown list, click on a dashboard under **My Dashboards**.
3. Click the **Print** button, which is represented by the printer icon.

4. Enter in the appropriate file name. The file type will auto-populate to PDF.
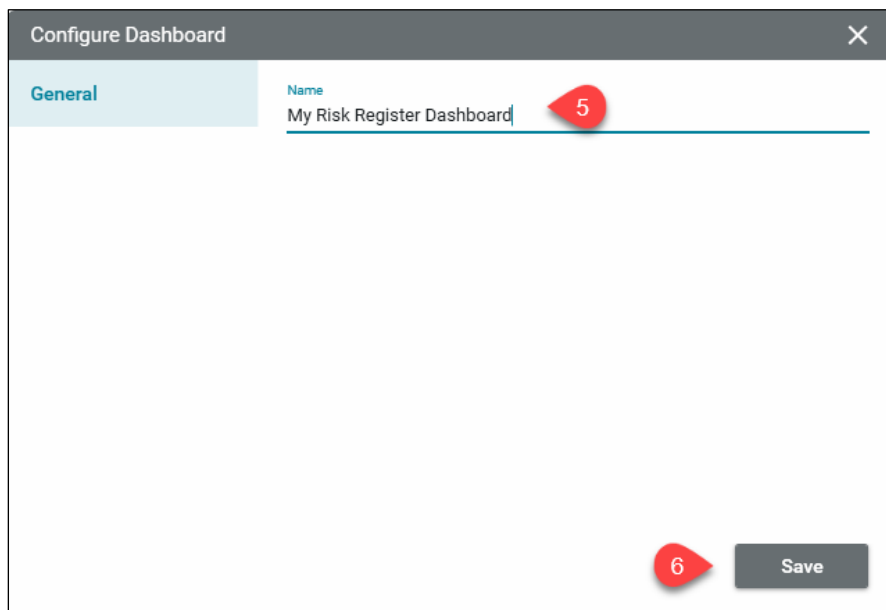5. Click **Save** to download the pdf.

Edit or Configure a Dashboard Name

1. After ensuring that you are in the appropriate domain, navigate to "Dashboard" on the left side bar.
2. Using the Dashboard Selector dropdown list, click on a dashboard under **My Dashboards**.
3. Click the **Edit** button, which is represented by a pencil icon, next to the printer icon.
4. Click the **Configure** button, which is represented by a pencil icon, next the trash can icon.
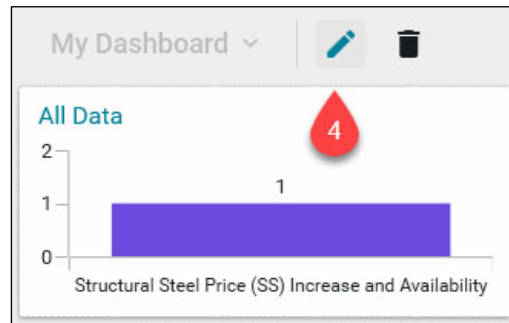
5. Change the name of the dashboard.
6. Click **Save** to exit out of the "Configure Dashboard" window.

7. Click **Save** in the top right corner to save changes to the dashboard

Delete a Dashboard

1. After ensuring that you are in the appropriate domain, navigate to "Dashboard" on the left side bar.
2. Using the Dashboard Selector dropdown list, click on a dashboard under **My Dashboards**.
3. Click the **Delete** button, which is represented by a trash can.

4. Confirm the deletion by clicking **OK**.