

# ESR Business Intelligence

## Creating a local version of a National Dashboard

### Introduction

Each national dashboard in ESR BI is made up of a number of BI Objects. Most obvious is the Dashboard object itself along with the analyses and the dashboard prompts used within it. There are also objects such as shared filters and action links which together make up a National Dashboard. This guide will step through how to copy each object and 're-assemble' the dashboard locally so that organisations can edit it as required.

### Copying a BI Object

To copy an object from the public area:

Step	Screen	Description
1		<p>Select the object you want to copy from the catalog by clicking on it (once selected, it will turn blue) and click the  icon on the top toolbar. This is the copy icon. Any BI object (analysis, dashboard, filter etc) can be copied using this method.</p>
2		<p>Click on 'My Folders' within the Folders Window and click on  icon which will</p>



## Electronic Staff Record



		paste the analysis into the folder.
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When copying an entire national dashboard, begin by copying the dashboard itself, then the analyses, and lastly the dashboard prompts used within it. *Note; entire folders rather than individual items can be copied to speed up the copying process.*

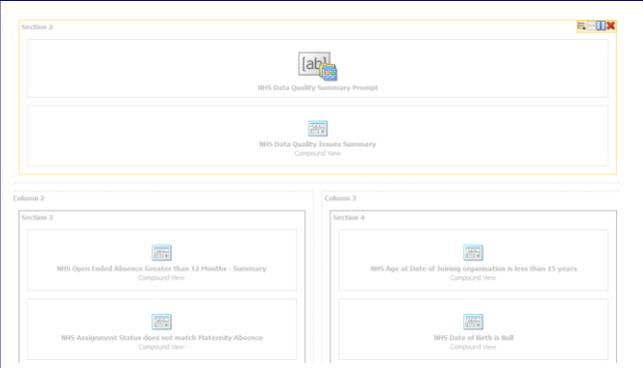
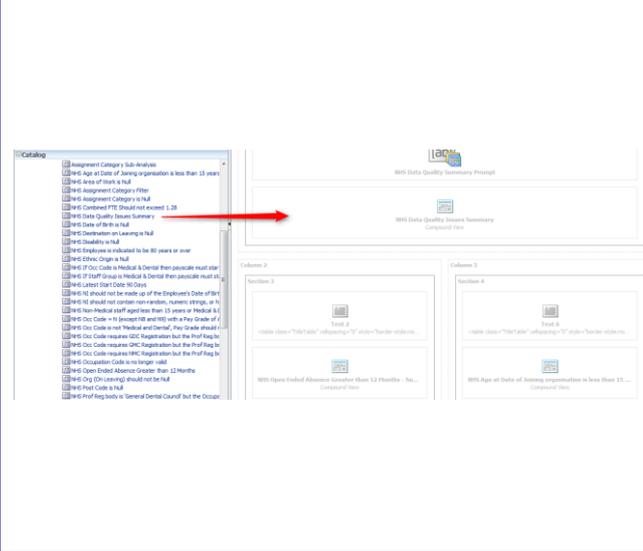
Next, explore each analysis and check whether any shared filters are used (a guide to using filters is available on the ESR Hub within the Reporting folder). If so, locate the shared filter and copy it into the relevant filter folder:

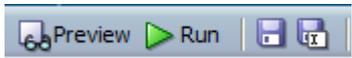
- ‘\_filters’ when working in My Folders
- ‘Subject Area Contents’ when working in the Shared Area.

*Note; if no filter folder is available, no shared filters have been created. Create a shared filter using the relevant subject area, save it and the folder structure will be created for you.*

## Assembling a Dashboard using Local Objects

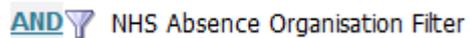
Once all BI objects have been copied locally, the dashboard can be re-assembled using the local versions:

Step	Screen	Description
1		<p>Edit the local version of the dashboard. Within it, the national version of each analysis and/or dashboard prompt will still be referenced.</p>
2		<p>Replace each dashboard prompt and analysis with the local version by dragging it onto the dashboard from the catalog window in the lower left corner of the screen. As each local object is added, ensure the National Version is removed using the red cross  displayed when hovering over an</p>

		object. <i>Note; it may be easier to rename each local copy making it easier to differentiate between local and national versions.</i>
3		Ensure the dashboard is saved using the save icons in the top right corner of the screen.

## Updating an Analysis to use Local Shared Filters

If a national analysis uses a shared filter, when the analysis is copied, it will still contain a reference to the national shared filter. To update it:

Step	Screen	Description
1		Check the analysis to determine whether a shared filter is being used. A  icon will be displayed when hovering over each filter within the analysis if it is a shared filter.
2		Delete the shared filter using the  icon and locate the local copy within the catalog window in the lower left corner of the screen.
3		Double click on the filter to apply it to the analysis.

4		Save the analysis
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