

ESR Business Intelligence

Prompts

Introduction

A dashboard prompt is the most common and flexible prompt type. Dashboard prompts allow the end user to specify the data values that determine the content of one or all of the analyses contained on the dashboard. Dashboard prompts are reusable so you can create one prompt and use it many times. The prompt is created outside of a specific dashboard and is stored in the catalogue as an object. Each set of dashboard prompts is based on a specific subject area.

Creating a Dashboard Prompt

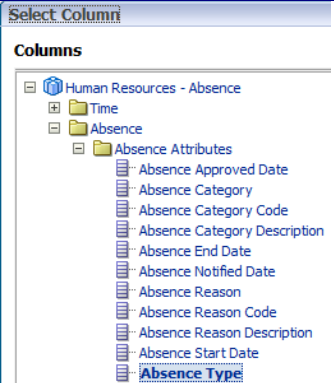
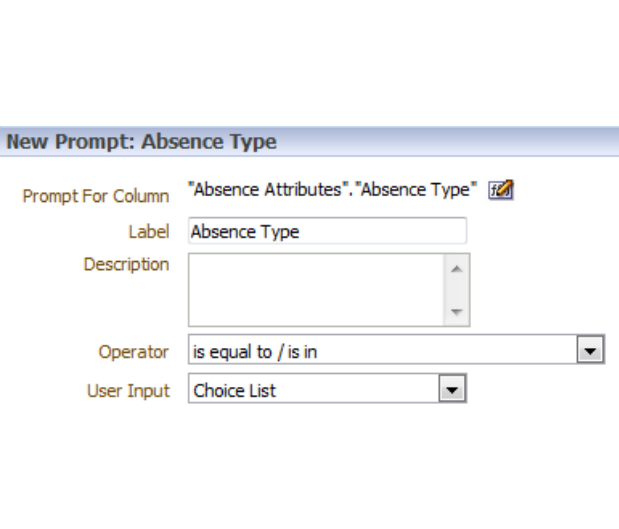

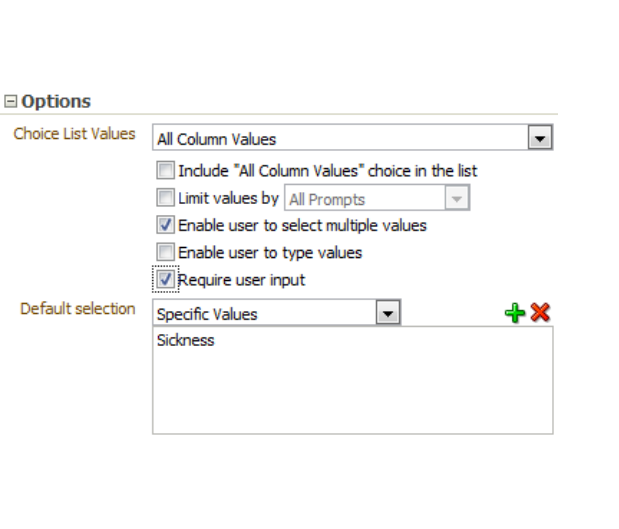

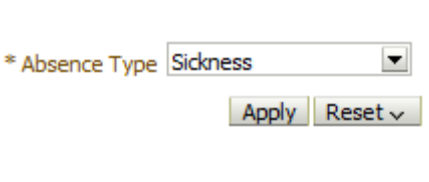


To create a dashboard prompt:

Step	Screen	Description
1		Click on the New drop down menu, select Dashboard Prompt and select the Subject Area on which to base the prompt
2		Click on the icon and select Column Prompt from the drop down list to add a new prompt



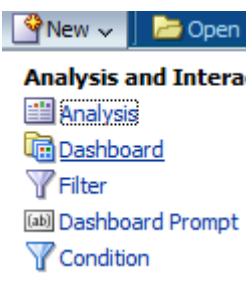
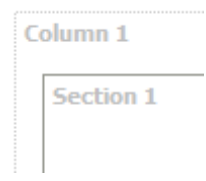


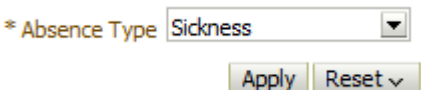

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3		<p>Select the Column to base the prompt on. In this example we have selected Absence Type</p>
4		<p>Ensure the correct column is being prompted for, to change the formula for this click on the  icon. Give the prompt a label and set an operator and User input choice. In the example we have used 'is equal to / is in', and 'Choice List' to select a value from.</p>
5		<p>Within the options menu setup the prompt as required and select how the default selection should be displayed. In the example we have chosen 'Sickness' as the default absence type to use. To select the default from the available data items use the  icon.</p>
		<p>Click ok and an example of the prompt will appear in the display window. Save   the prompt.</p>

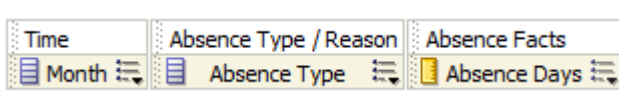

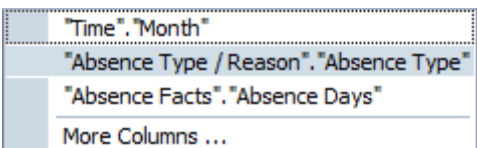

Applying a Prompt to a Dashboard

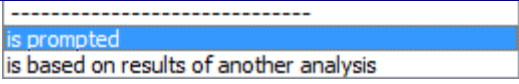
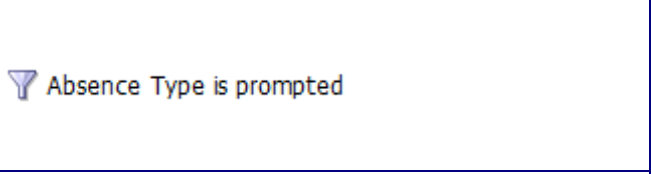


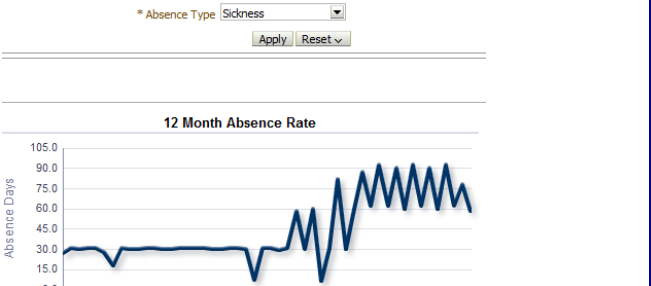

Once a prompt has been created and saved, it can be added to a dashboard to control available analyses within that dashboard. To add a prompt to a dashboard:

Step No.	Screen	Description
1		Click on the New drop down menu, select Dashboard. Save the new dashboard when prompted. <i>Note: If the dashboard is to appear under the Dashboard drop-down menu, it should be saved within the Shared Area.</i>
2		Add a new section to the Dashboard by dragging a 'Section' object from the Dashboard Objects window. <i>Note: A column will automatically be created, Sections sit within Columns in Dashboard design.</i>
3		Located the saved prompt from the Catalog window and drag it into the new section.
4		The prompt will appear in the Dashboard Edit View. Save the Dashboard.
5		Click the  Run icon and the dashboard will run and display the prompt

Allowing an Analysis to be controlled by a Prompt

For any dashboard prompt to be effective, one or more analyses within the dashboard need to be setup to allow the prompt to filter the analysis according to the value(s) selected by the user. To setup an analysis to be filtered by a prompt:

Step No.	Screen	Description
1		Open the analysis in the criteria view and click on the  icon to add a new filter.
2		Select the column that the prompt will control. <i>Note: This should be the same column that the prompt was created with to ensure the data matches and is filtered correctly.</i>
3		Setup the filter in the New Filter window and select an Operator of

		'is prompted' from the drop down list.
4		Click Ok and the filter will appear in the filter window showing the column to be controlled by the prompt.
5		Open the Dashboard and drag a new section into the Edit View
6		Drag the analysis into the new section from the catalog window and save the dashboard
7		Click the  icon and the dashboard will run and display the prompt and analysis. These will update depending on the data item selected within the prompt

