Tutorial

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Installation and start

Installation

Files extraction:

Extract the content of **install_dd_<numversion>_64.zip** into the folder of your choice.

You can use the freeware 7zip.

DigDash Enterprise is now installed on your computer.

Please note that DigDash Enterprise is usually installed on a distant server which allows to share contents between users.

Startup

Open your installation directory, then double-click on the file **StartDigDash.exe**.

Click on “Start”.

The first start can take several minutes. The green icon will keep blinking until the server is completely started. The message “The server is started” will appear.

StartDigDash.exe

Startup

When the DigDash Enterprise server is ready, click on “Execute”.

A menu appears with shortcuts to:

- **Studio** : a dedicated tool to create charts
- **Dashboard editor :** a web interface to create pages with your charts
- **Administration**: the home page to all administration pages

Create the data model “telecom”

Create the data model “telecom”

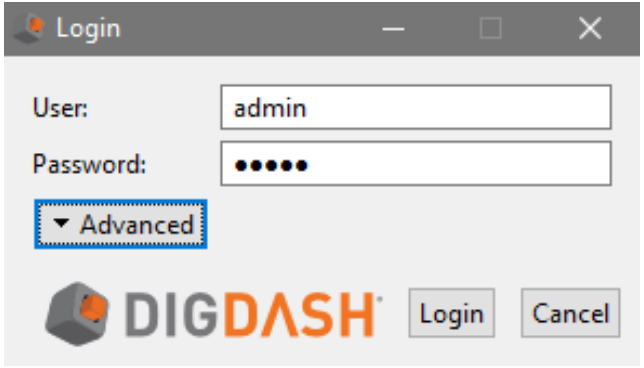
Objective : Import into **DigDash Enterprise** the Excel file “telecomen.xls” (included) which represents the data of a (fictive) telecommunication company.

Enhance this raw source and build a data model to create relevant graphics.

This data model will be used by several charts.

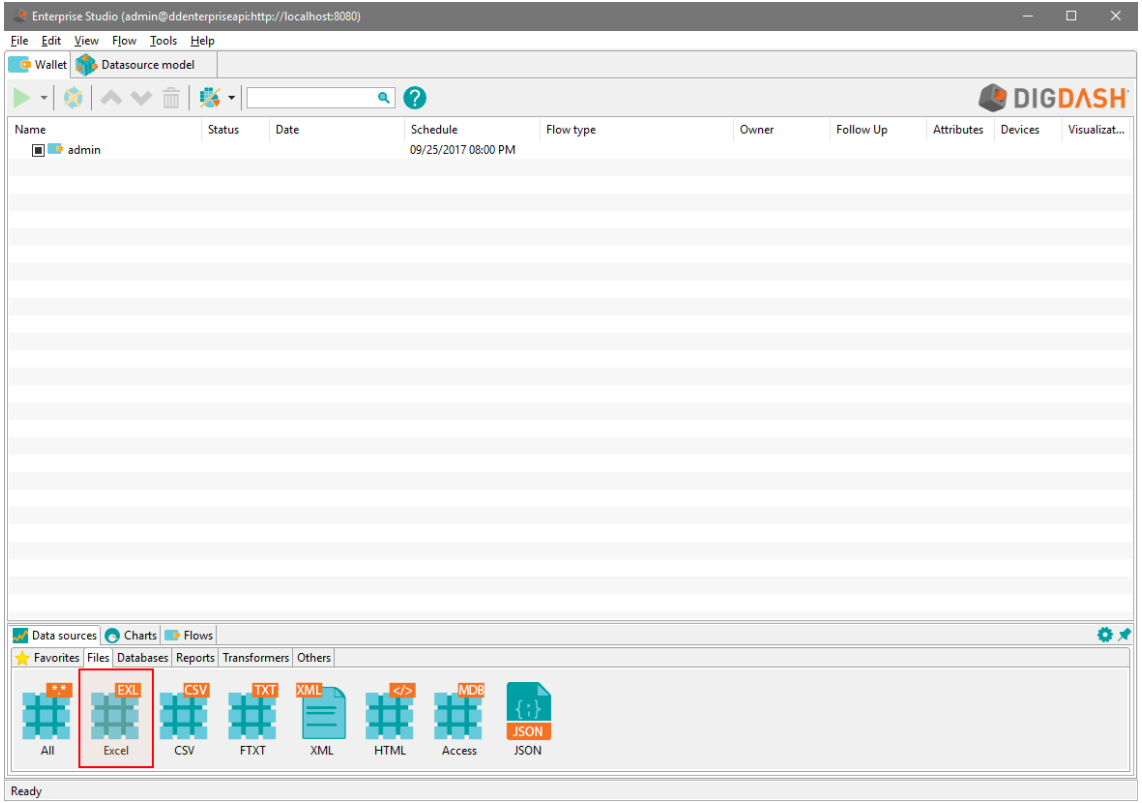
Click on “**Chart creation (Studio)**” in the application StartDigDash.exe.

In the login dialog, fill in the user and password fields with *admin* and *admin*.



Step 1: Import a data source file

Locate the toolbar at the bottom of the main window and click on the “**Data sources**” tab, then “**Files**” and “**Excel**”.

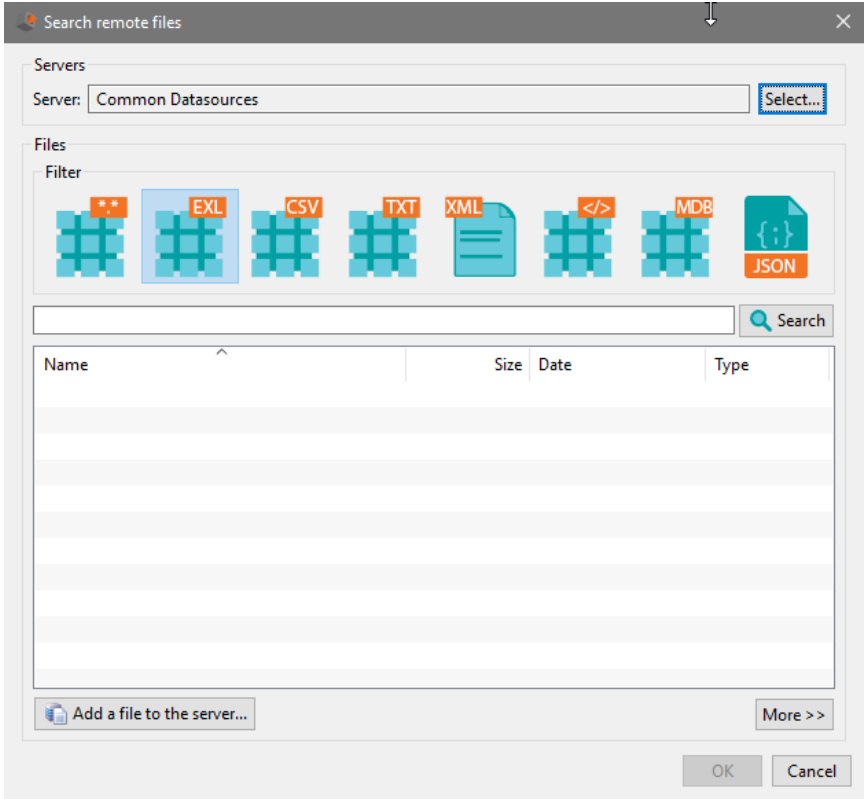


Step 1: Import a data source file

The window **Search remote files** appears:

- Click on **Select** at the top then choose the documents server *“***Common Datasources***”*.

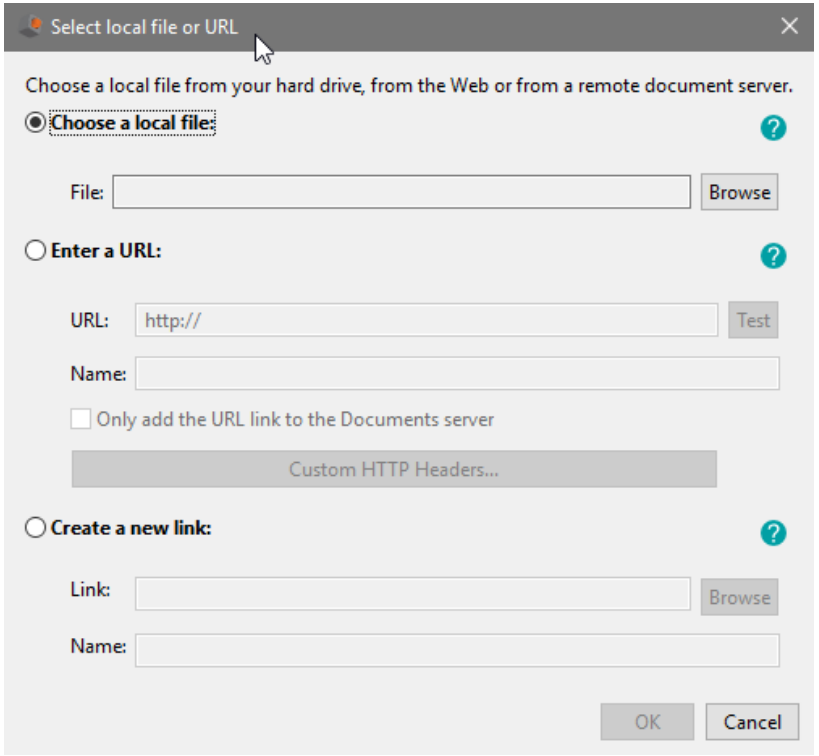
- Click “**Add a file to the server...**”. The window **Select local file or URL** appears.



Step 1: Import a data source file

Select **Choose a local file** then click on **Browse** to select the file «telecomen.xls» which can be found in the folder **documentation\en\sample** of your installation directory.

Click **OK.**

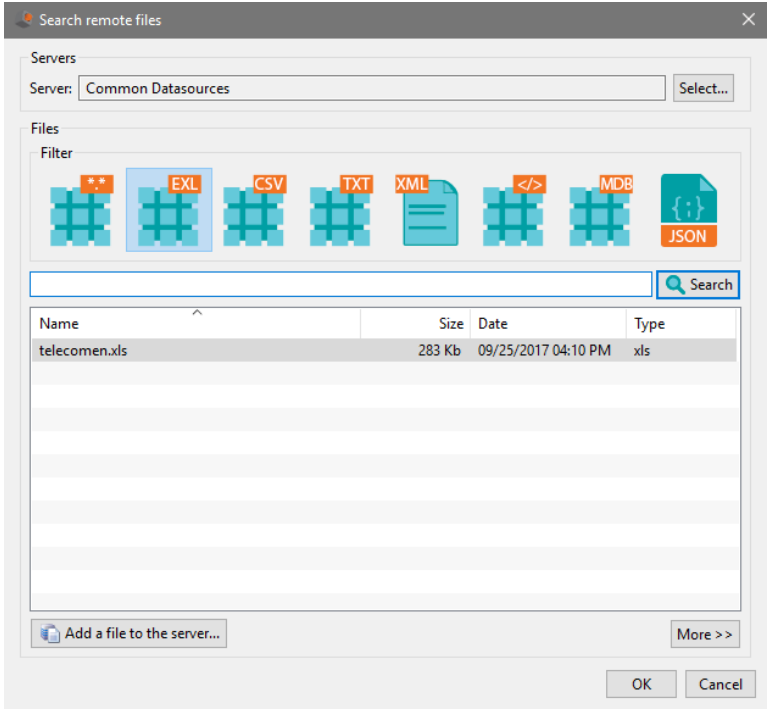


Step 1: Import a data source file

The file is now saved on the DigDash server and accessible to all users.

NB : if you use the documents server “UserDocs”, you will be the only one who can access the document.

In the window **Search remote files**, select “telecomen.xls” then click **OK**.

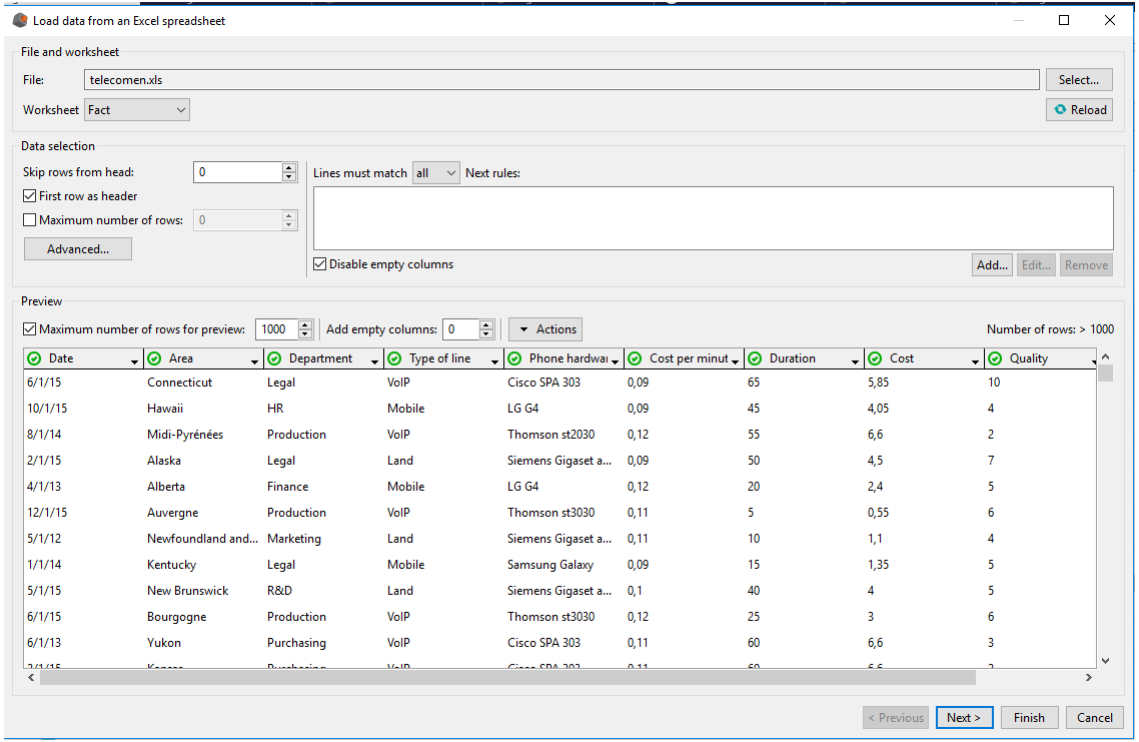


Step 1: Import a data source file

The window **Load data from an Excel spreadsheet** appears.

Check the boxes:

- *First row as header*
- *Disable empty columns*



Step 1: Import a data source file

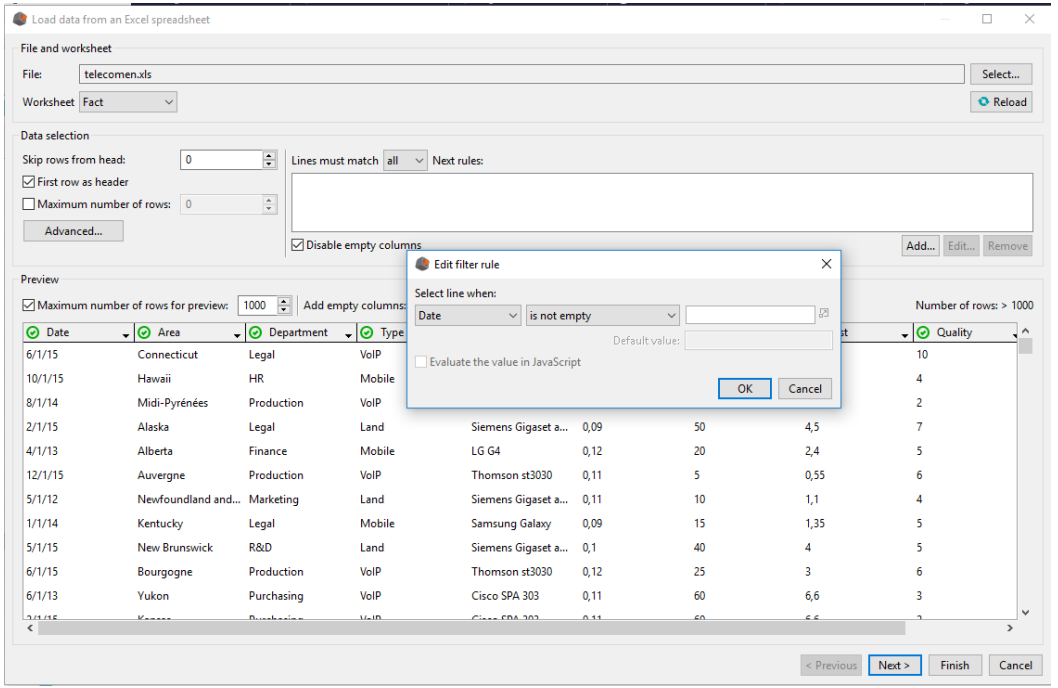
Click **Add ...** to the right of **Disable empty columns**.

The window **Edit filter rule** is displayed.

Leave the default values (**Date** in the first drop-down list and **is not empty** in the second drop-down list)

Click **OK** then **Next**.

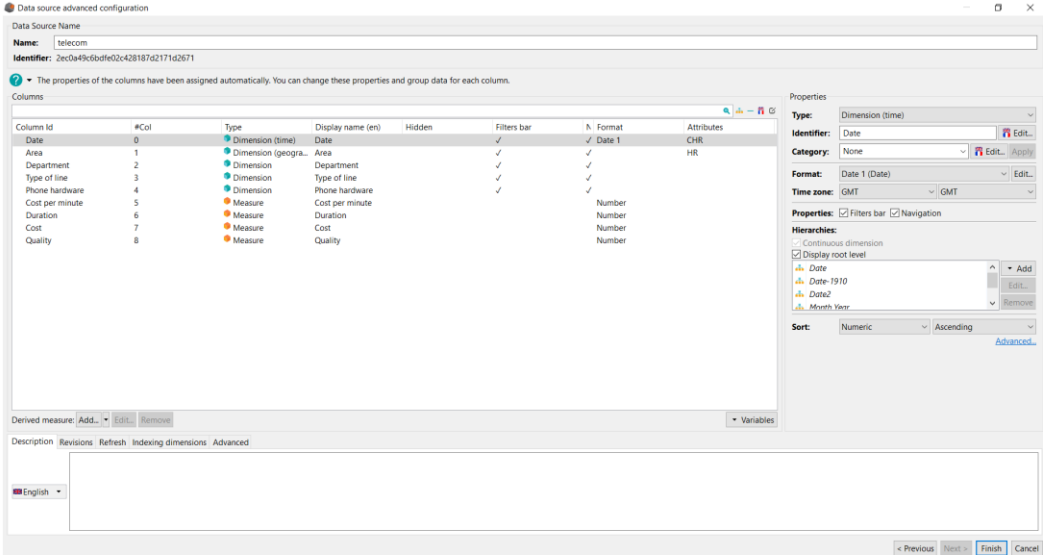
Name the data model « telecom »



Step 2: Configure the data model

Next objectives:

- Create a manual hierarchy of departments within the organization.
- Create an automatic hierarchy on phone hardware.
- Create a target on communication costs
- Create a calculated measure « Euro Dollar cost » which varies according to the € / $ exchange rate

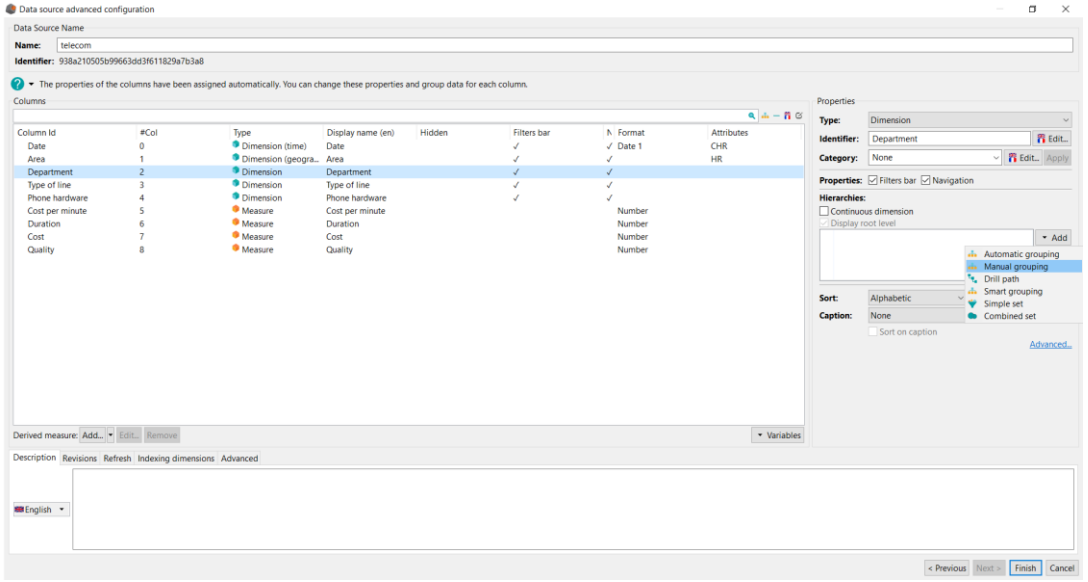


Step 2: Configure the data model

Creating a manual hierarchy

Select **Department**, click **Add** in the **hierarchies** panel and select **Manual grouping**.

The window **Group editor** appears.

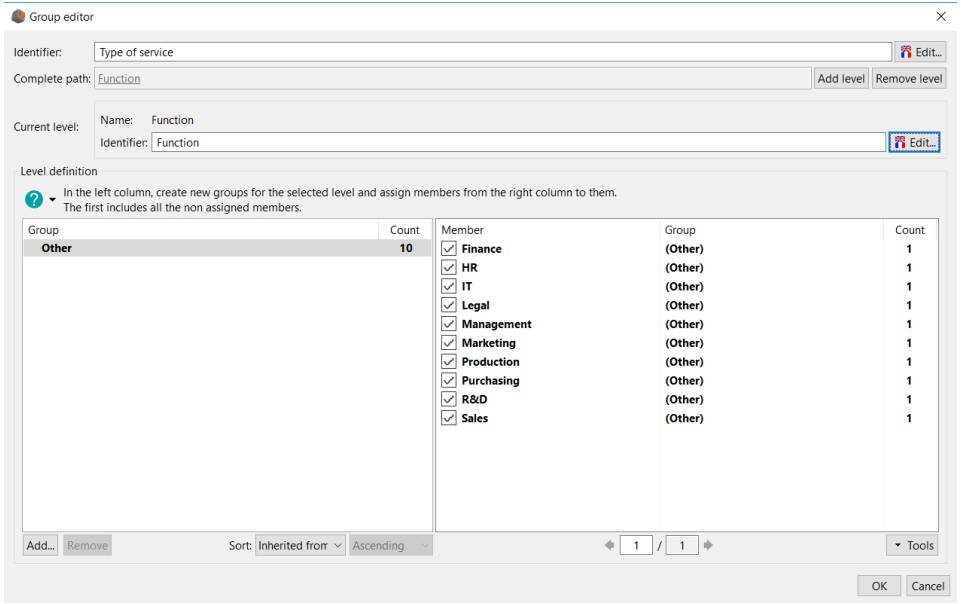


Step 2: Configure the data model

The default hierarchy name is **Group 0**. Rename it to **Type of service**.

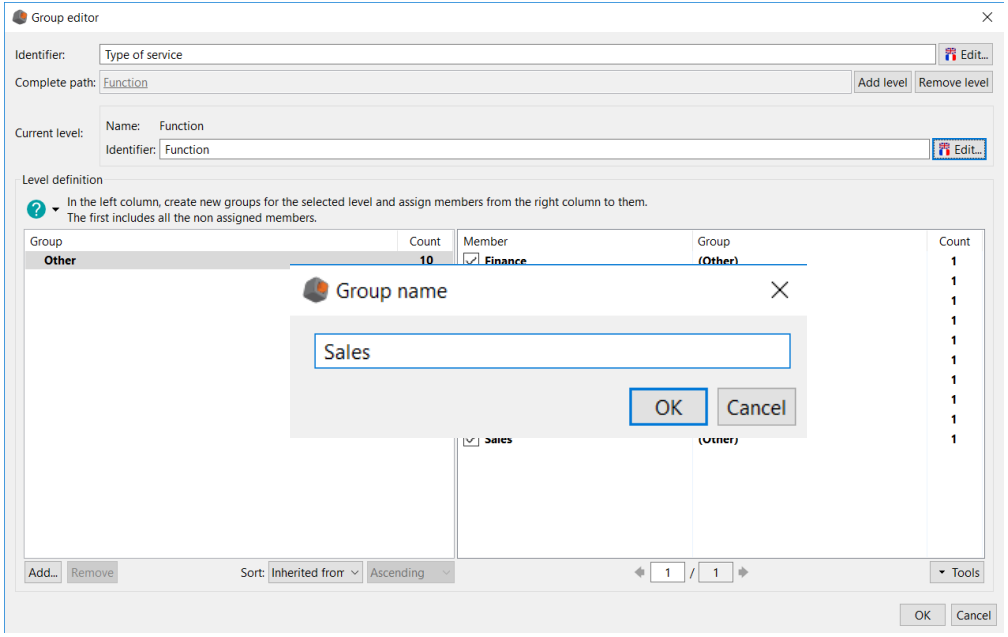
The first level called **Level 0** contains all the column values. Rename it to **Function**.

To create groups in this level, click **Add…** on the bottom left corner.



Step 2: Configure the data model

The window **Group name** appears. Type **Sales** and do the same with **Management**, **Production** and **Administration**.



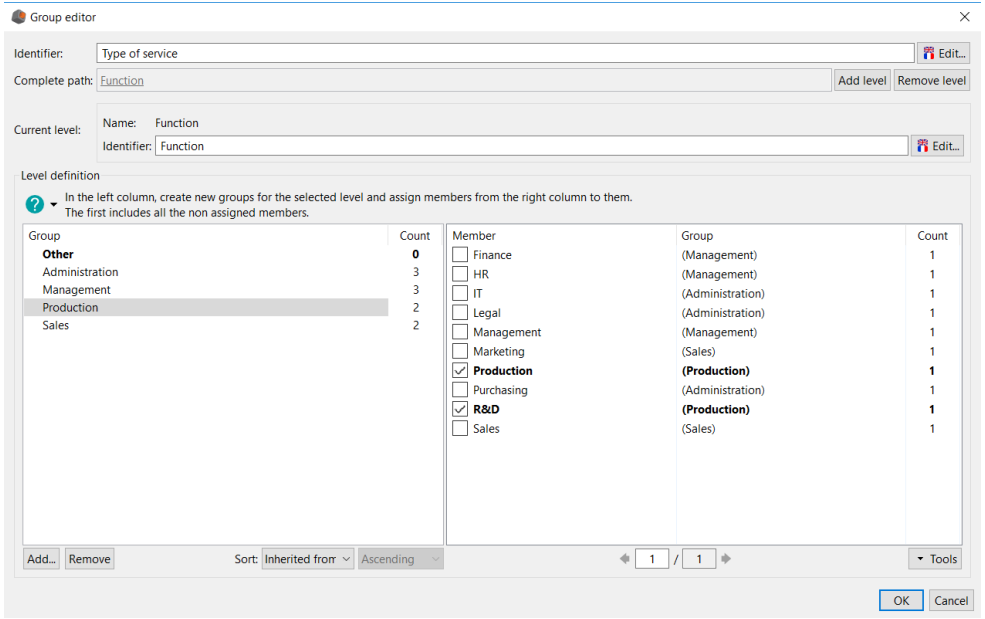
Step 2: Configure the data model

Assign members to groups.

Select **Administration** then check the boxes **IT**, **Legal** et **Purchasing** in the right panel.

Do the same for :

- **Management**: Finance, HR and Management
- **Production:** Production and R&D
- **Sales :** Marketing and Sales



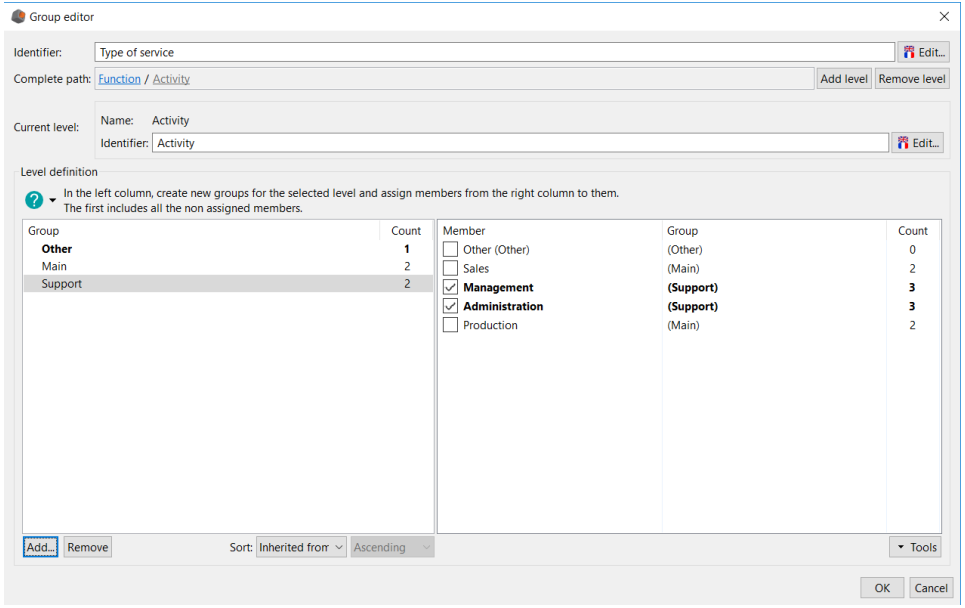
Step 2: Configure the data model

Add a second level and name it **Activity**.

Add two groups **Main** and **Support** with the following members:

- **Main**
  - Sales, Production
- **Support**
  - Management, Administration

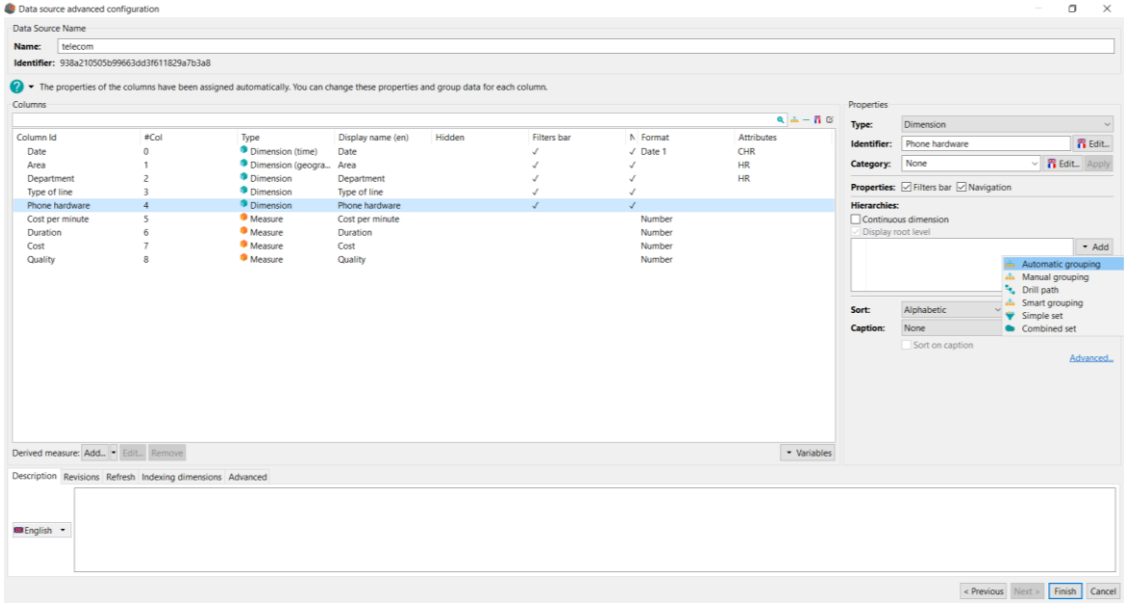
Click **OK** to save your hierarchy levels.



Step 2: Configure the data model

Objective: create an automatic hierarchy

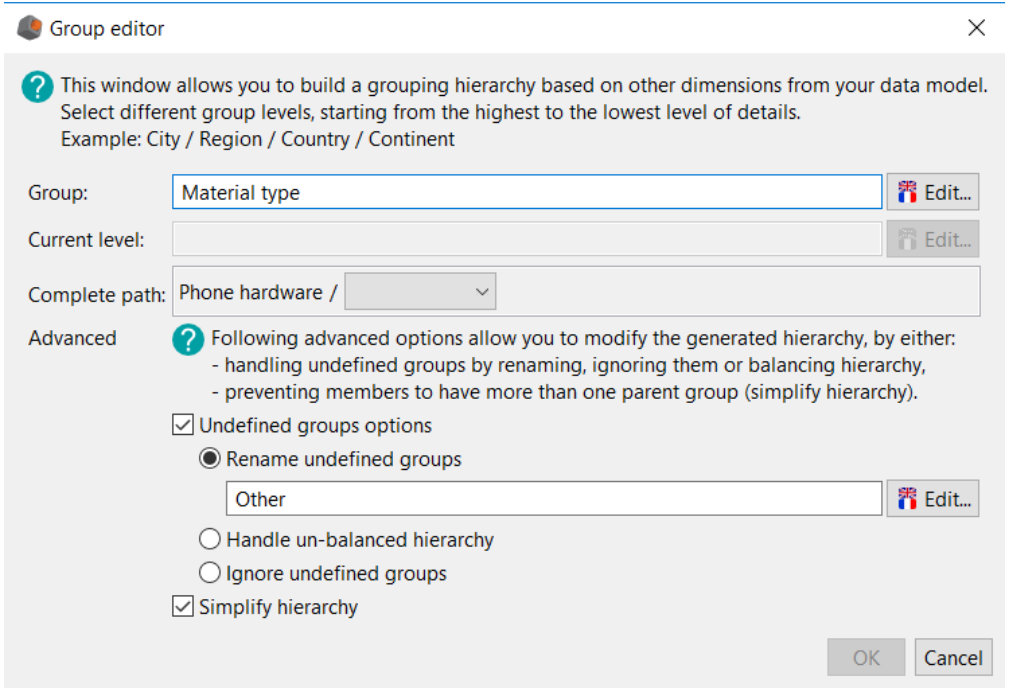
Select **Phone Hardware** then click **Add** in the **Hierarchies** panel and select **Automatic grouping**.



Step 2: Configure the data model

The window **Group editor** appears.

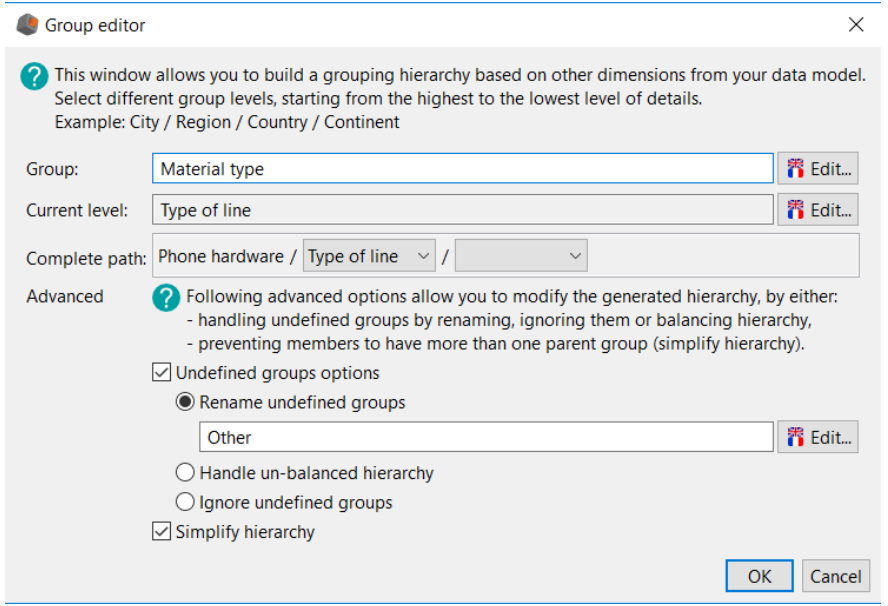
The default group name is **Groupe 0**, rename it to **Material type**.



Step 2: Configure the data model

- The complete path is displayed in the **Complete path** fields.
- Each hierarchical level is separated by ***/***.
- **Phone hardware** is the first level of the hierarchy.
- Open the drop-down list on the second level and select **Type of line**.

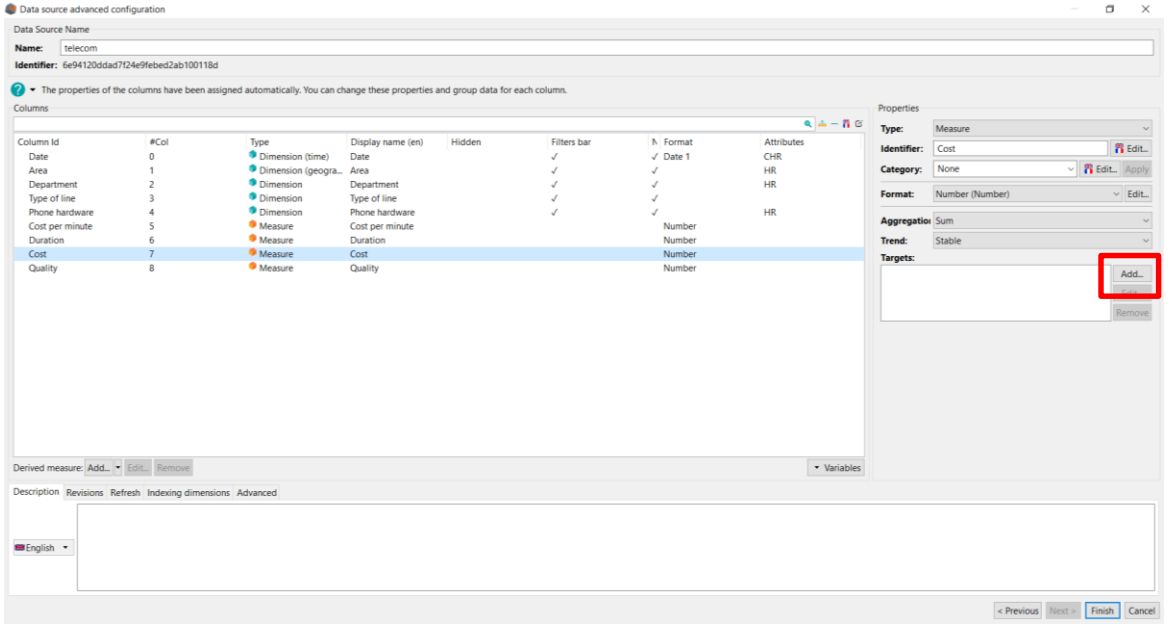
Click **OK** to save.



Step 2: Configure the data model

Create a new target of 21000€ on the **Cost** measure. To reach the target the cost has to decrease.

Select the measure **Cost** then click on **Add…** in the **Target** panel.



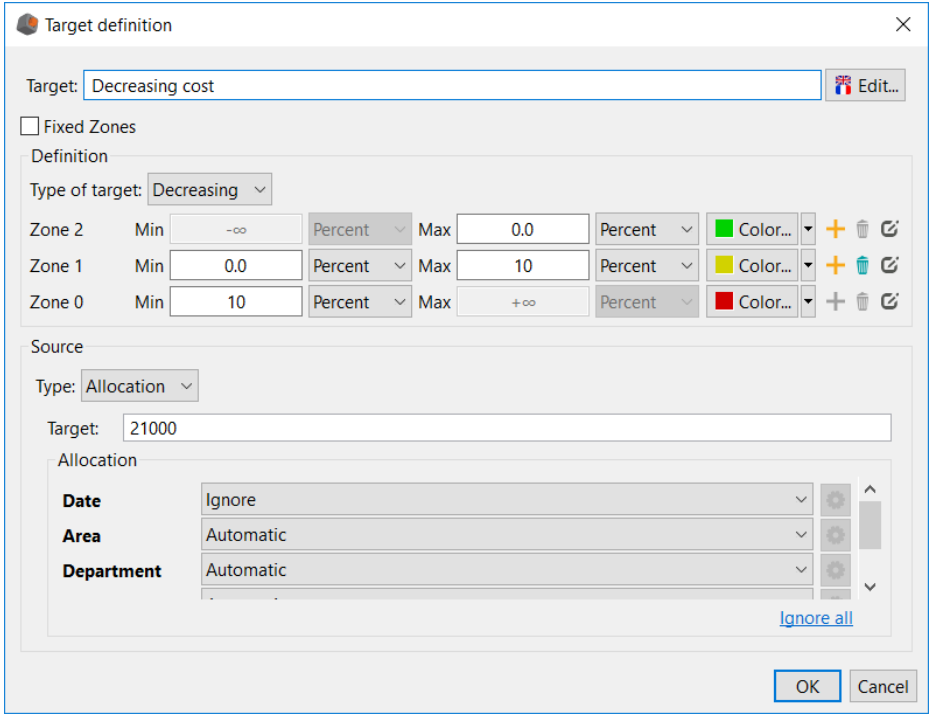
Step 2: Configure the data model

Name the target **Decreasing cost**.

In the **Type of target** drop-down list select **Decreasing**.

In the **Type** drop-down list select **Allocation** then fill in the value **21000**.

Click **OK** to save your target.



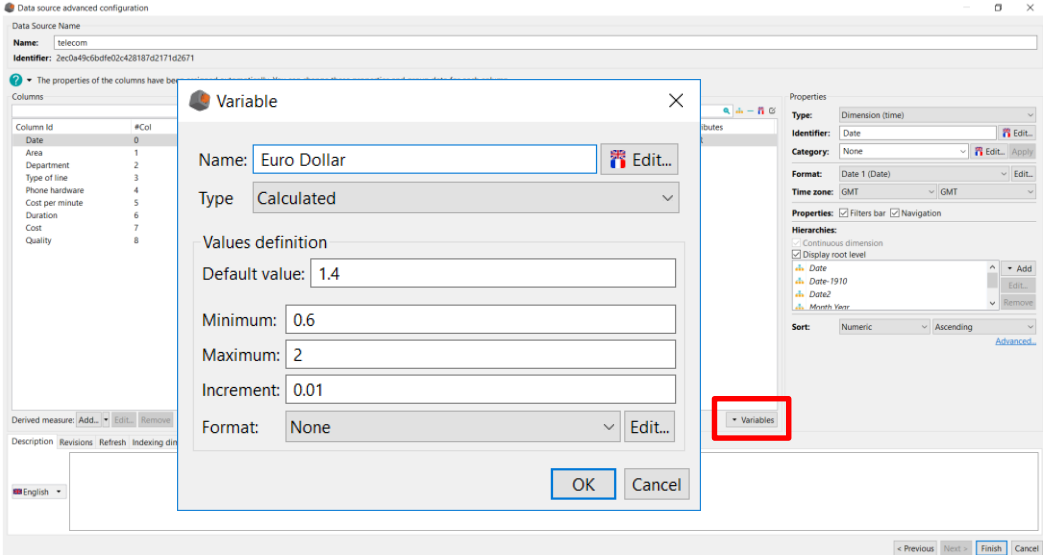
Step 2: Configure the data model

Creating a Euro/Dollar conversion variable.

Click **Variables** then **Add a variable…**

In the window **Variable** fill in the following fields:

- Name: Euro Dollar
- Default value: 1.4
- Minimum: 0.6
- Maximum: 2
- Increment: 0.01

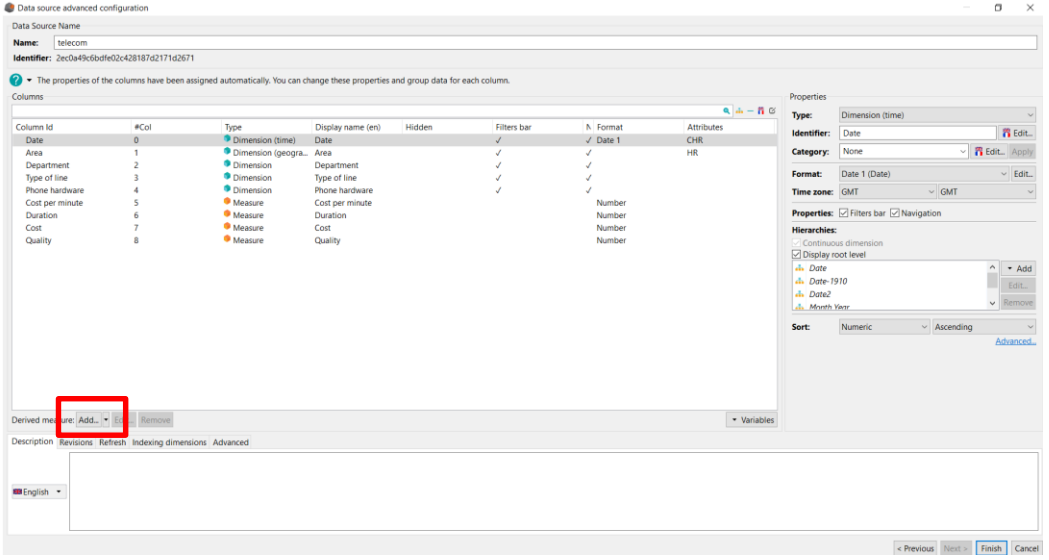


Step 2: Configure the data model

Create a calculated measure which changes the Cost based on the exchange rate €/$.

Click **Add…**

The window **Derived measure** appears.

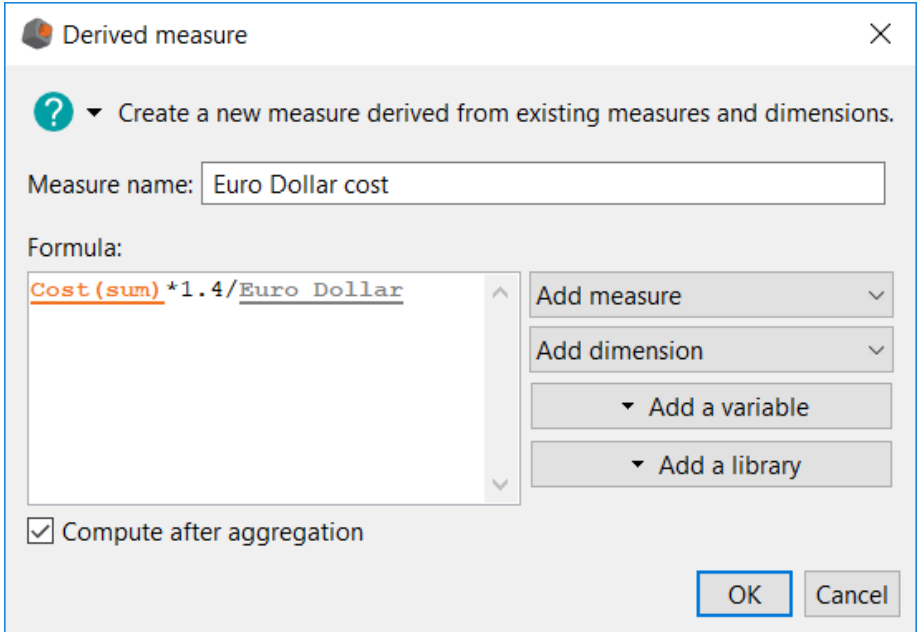


Step 2: Configure the data model

Name the new measure **Euro Dollar Cost**.

Click **Add measure** and select **Cost**.

Type ***1.4/*** and add the variable **Euro Dollar**.



Step 2: Configure the data model

The data model “telecom” is now ready.

Click **Finish** then **Ignore** in the window **Add a comment on the modification.**

Don’t close the next window as we will use it.

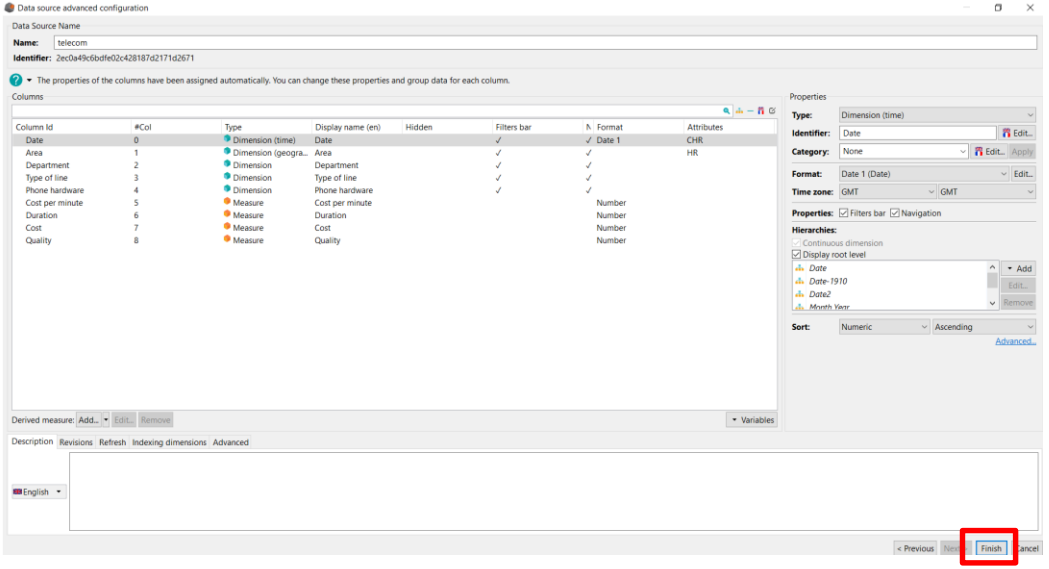
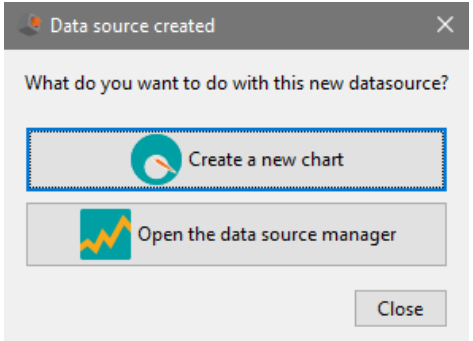


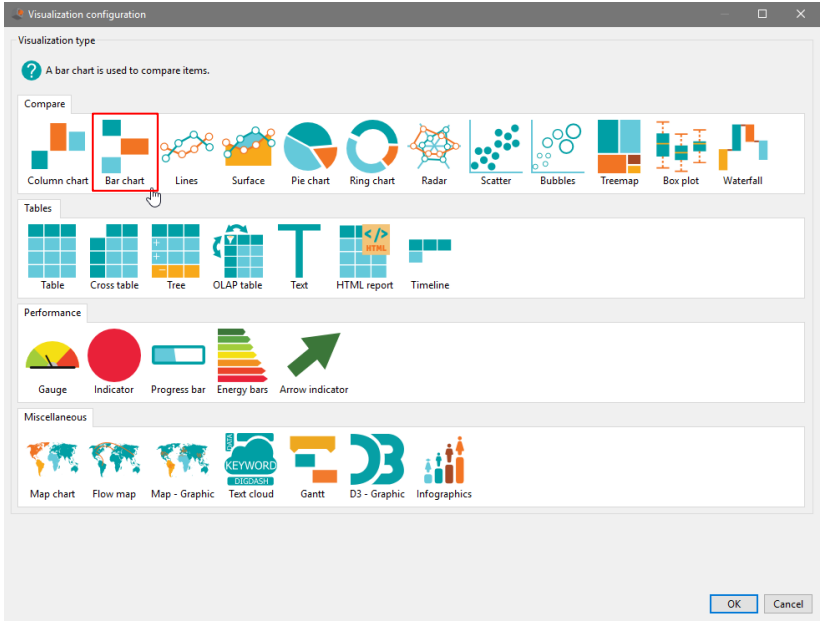
Chart creation: “Cost by Type of service”

Chart creation: “Cost by Type of service”

Objective: display a bar chart showing the **Cost by type of service**. The user can navigate through the **Type of service** hierarchy.

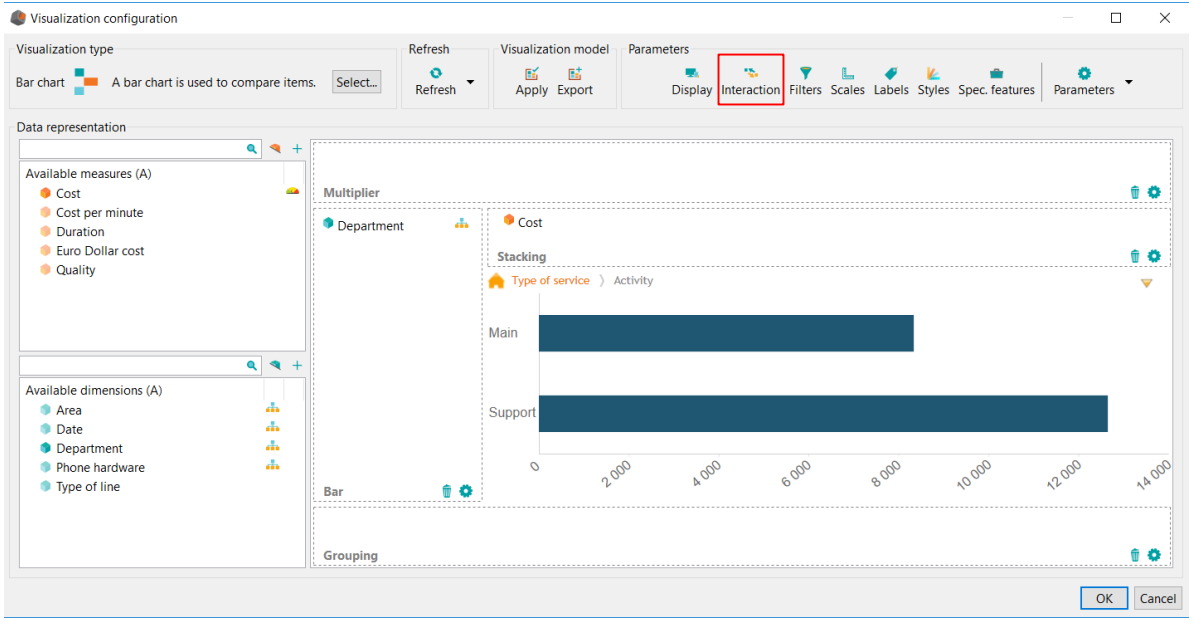
After saving the data model, choose **Create a new chart**, then choose **Bar chart**.





Visualization configuration

- Drag & drop the **Cost** measure on the **stacking axis**.
- Drag & drop the **Department** dimension on the **bar axis**.
- Click **Interaction** in the **Parameters** panel.

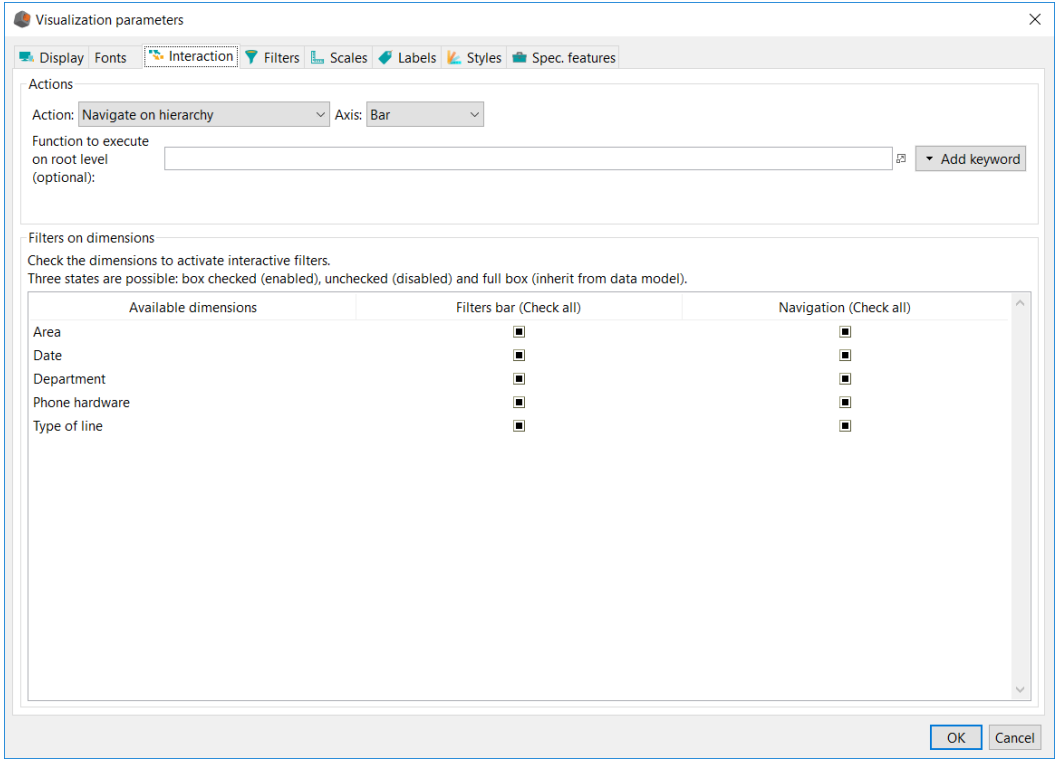


Visualization configuration

Select **Action:Navigate on hierarchy**.

Select the axis **Bar**, which will be used for the navigation.

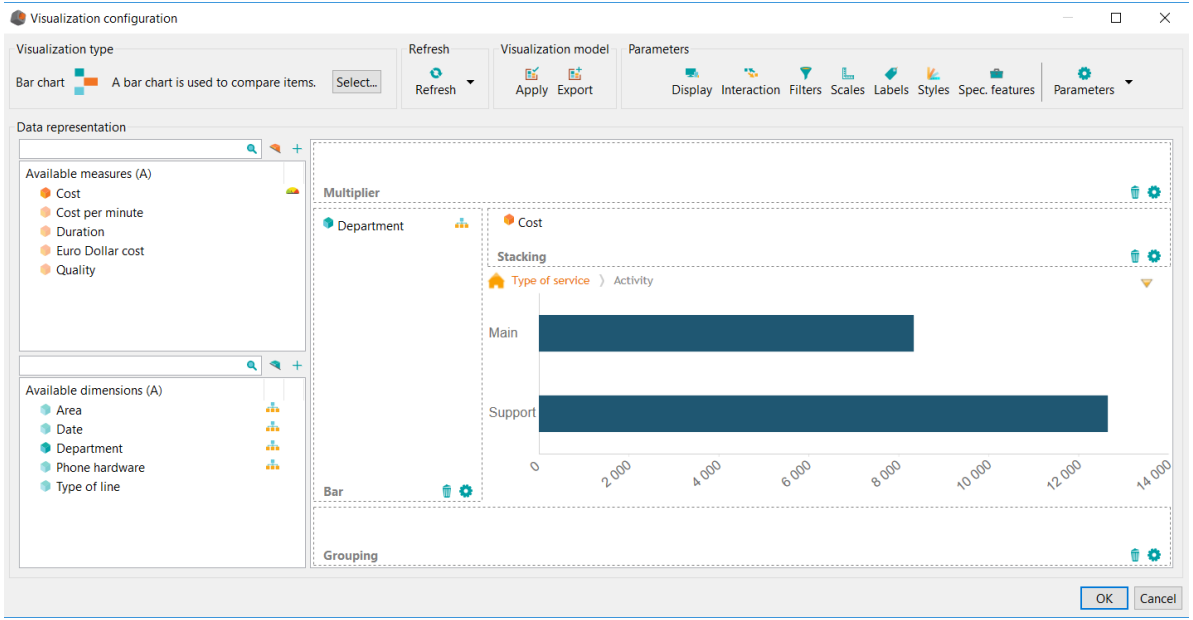
Click **OK** to save.



Visualization configuration

Now you can navigate through your data along the Department axis.

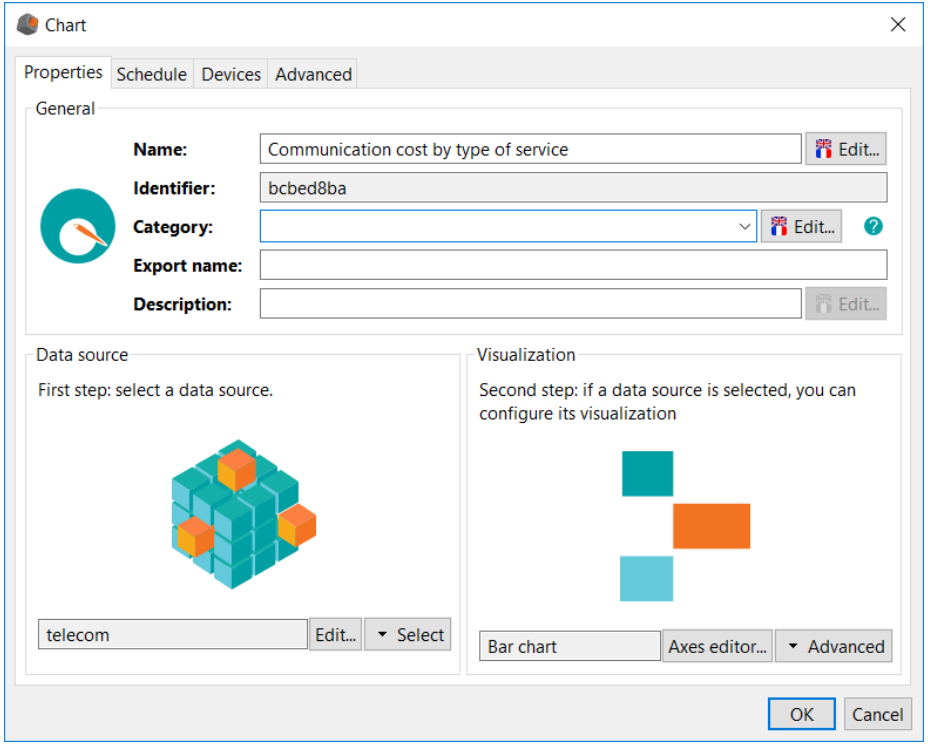
Click **OK** to validate the configuration.



Visualization configuration

Rename the new chart to **Communication cost by type of service**.

Click **OK** to validate. The chart is now saved into your wallet.



Synchronization

When a graph appears in bold in the wallet, it means that its configuration has changed. It is then necessary to update the data for the dashboard.

Right-click the graph, and then click **Synchronize**.

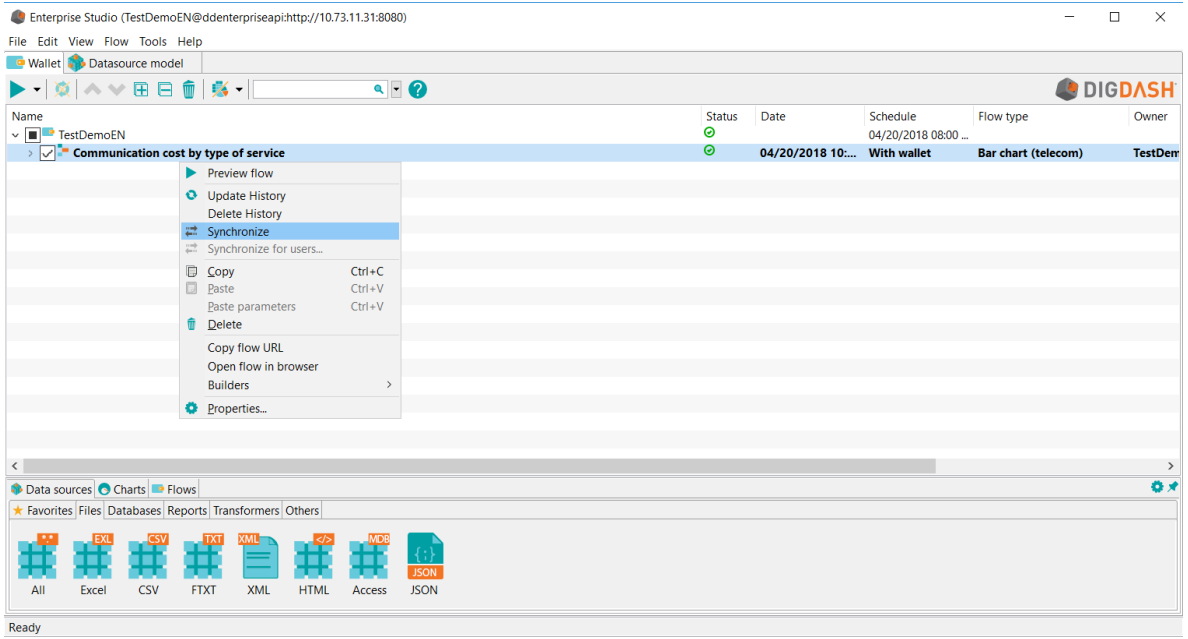
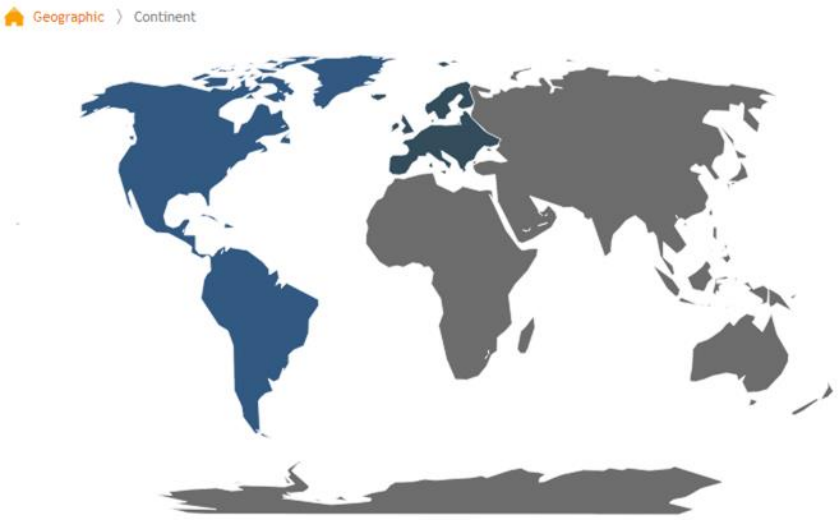


Chart creation:
“Communication cost by area“

Chart creation: “Communication cost by area“

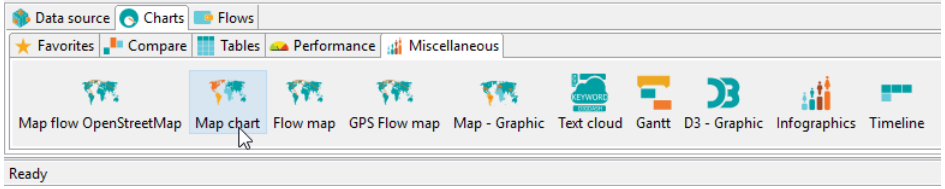
Objective : Create a map showing the **communication cost** by **continent**. Users can navigate through the geographic axis from continents to regions level when displaying the dashboard.

This chart uses the “telecom” data model previously created.



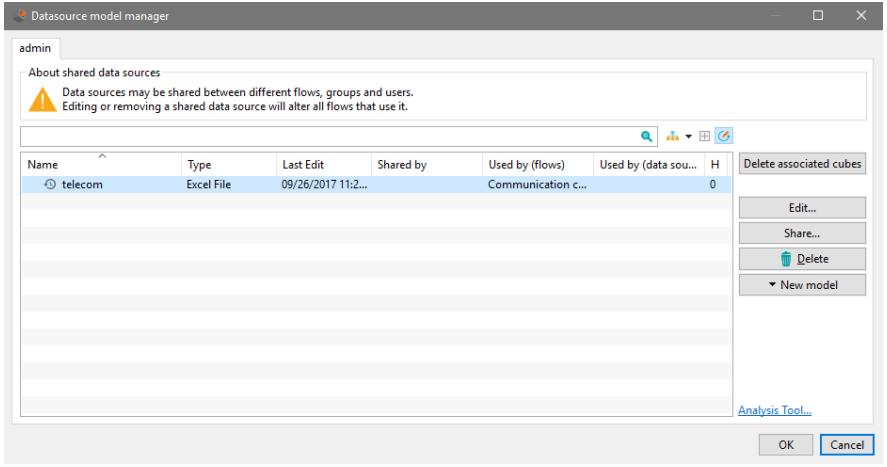
Step 1: Select an existing data model

Click on the **Chart** tab in the edition panel at the bottom of your screen then **Miscellaneous** and select **Map chart**.



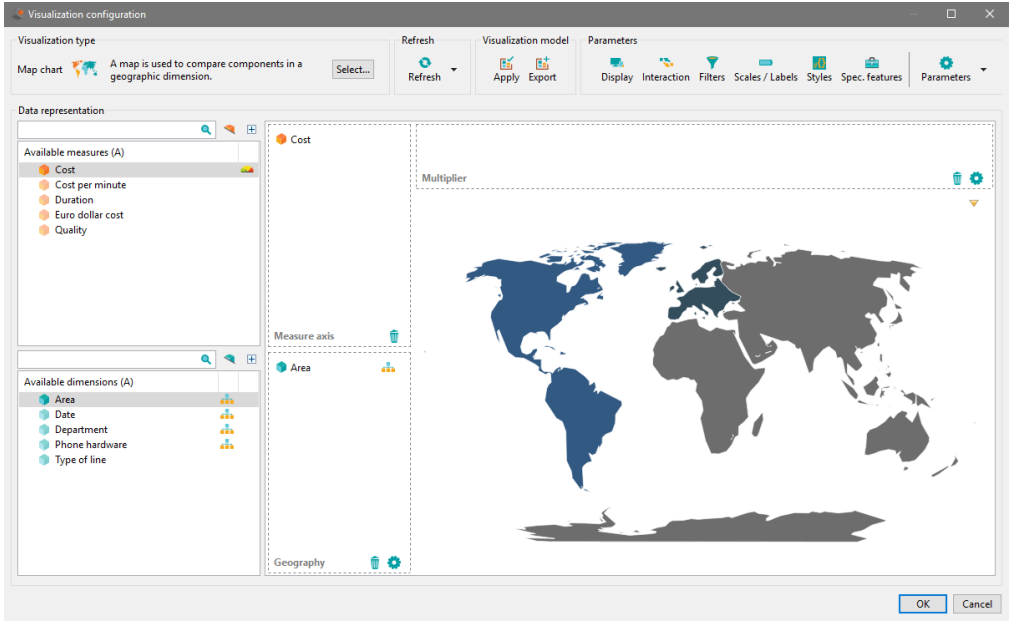
Select the data model **telecom** previously created.

The window **Visualization configuration** is displayed.



Step 2: Visualization configuration

- Drag & drop the measure **Cost** on **Measure** axis.
- Drag & drop the dimension **Area** on **Geography** axis.



Step 2: Visualization configuration

Click on the **Interaction** button.

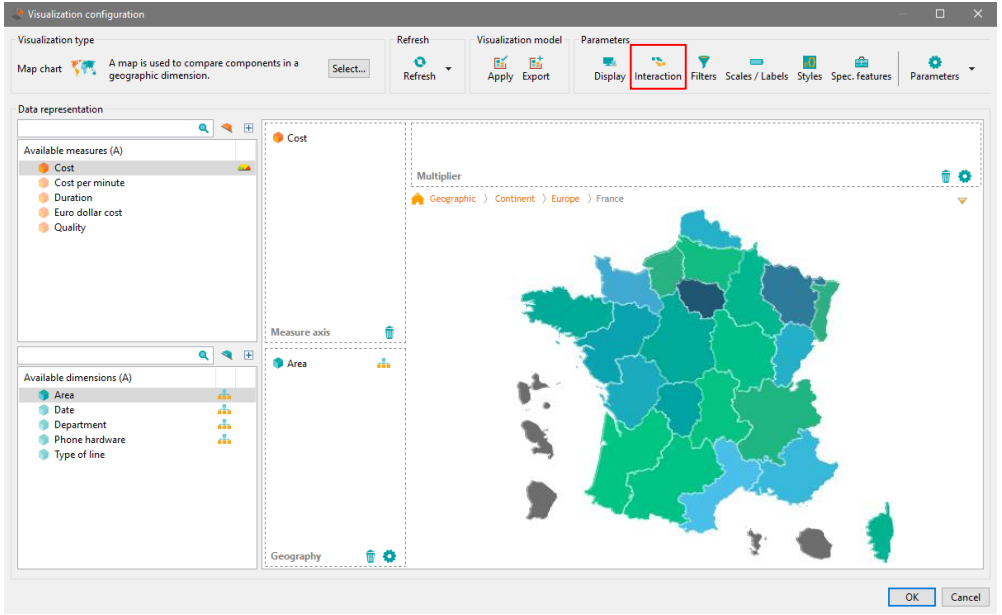
Select **Action:Navigate on hierarchy**.

Select **Geography** as Axis.

Click on **OK** to save.

Click on “Europe” and “France” to display the cost details for this area.

Click on **OK** to save your visualization.



Step 2: Visualization configuration

Rename the chart **Communication cost by area**.

Click OK.

Your map chart **Communication cost by area** is added to your wallet.

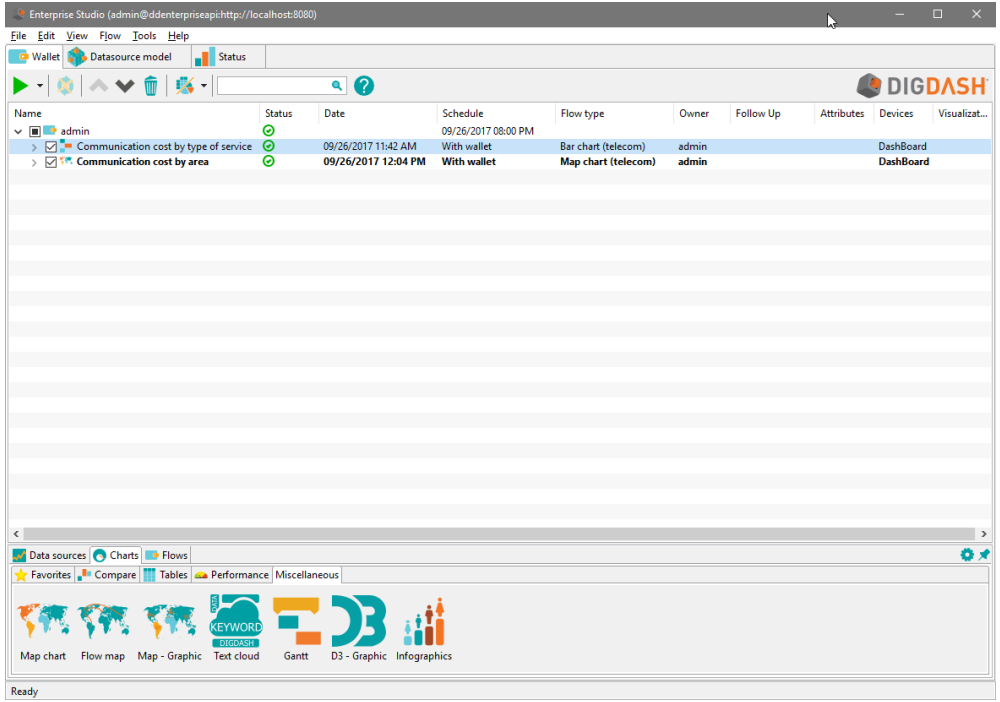
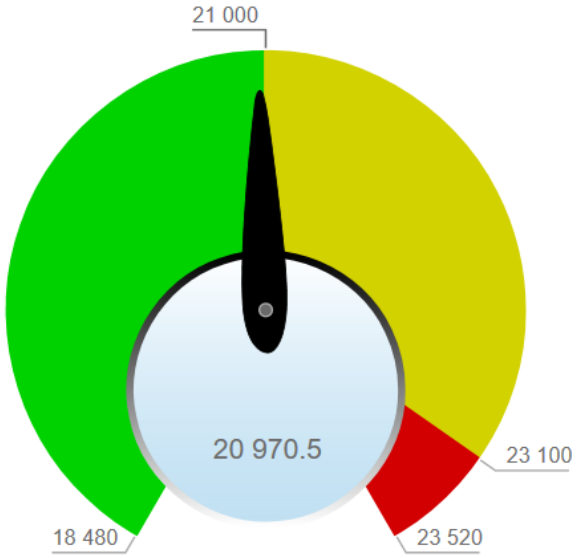


Chart creation: “Cost reduction target”

Chart creation: “Cost reduction target”

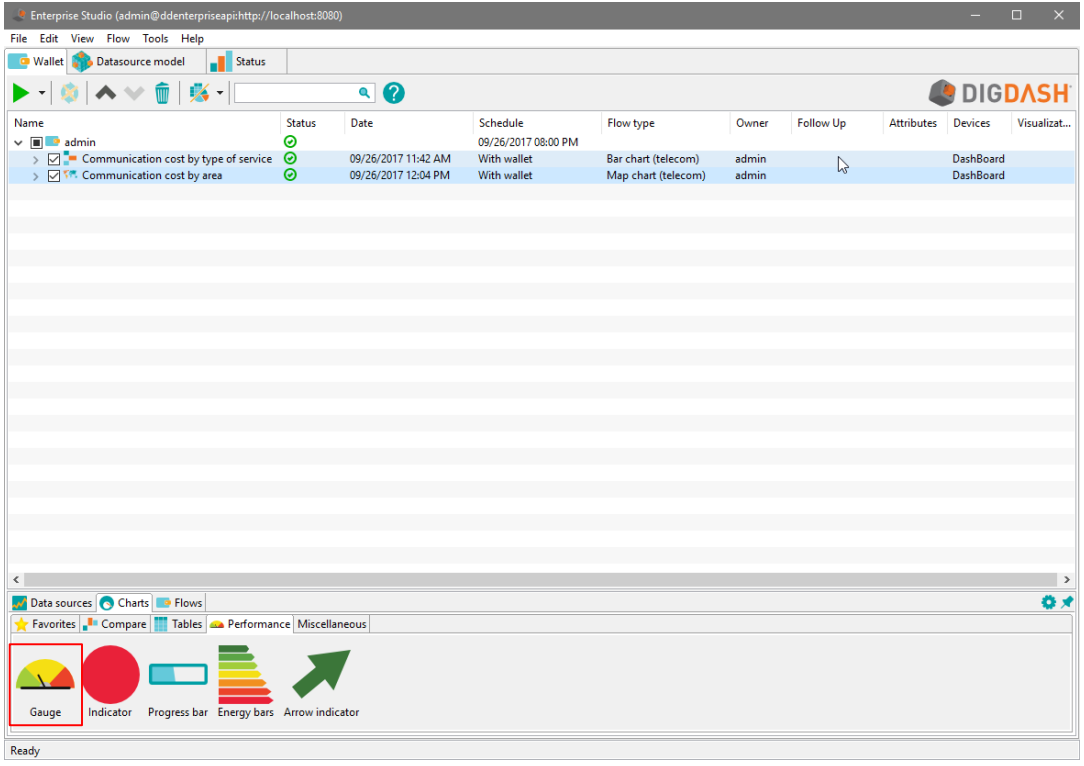
Objective : your management wants to monitor the communication cost and set a target to achieve. Create a gauge showing that target and the actual communication cost.

This chart uses the telecom data model previously created.



Step 1: Select an existing data model

Create a **gauge** chart (in the **performance** category) using the “telecom” data model.



Step 2: Visualization configuration

Drag & drop the **Cost** measure in the measure panel and select the **Decreasing cost** target.

Click on OK to save, then rename your gauge ***Cost reduction target***.

Click on **OK**, your gauge is now added to your wallet.

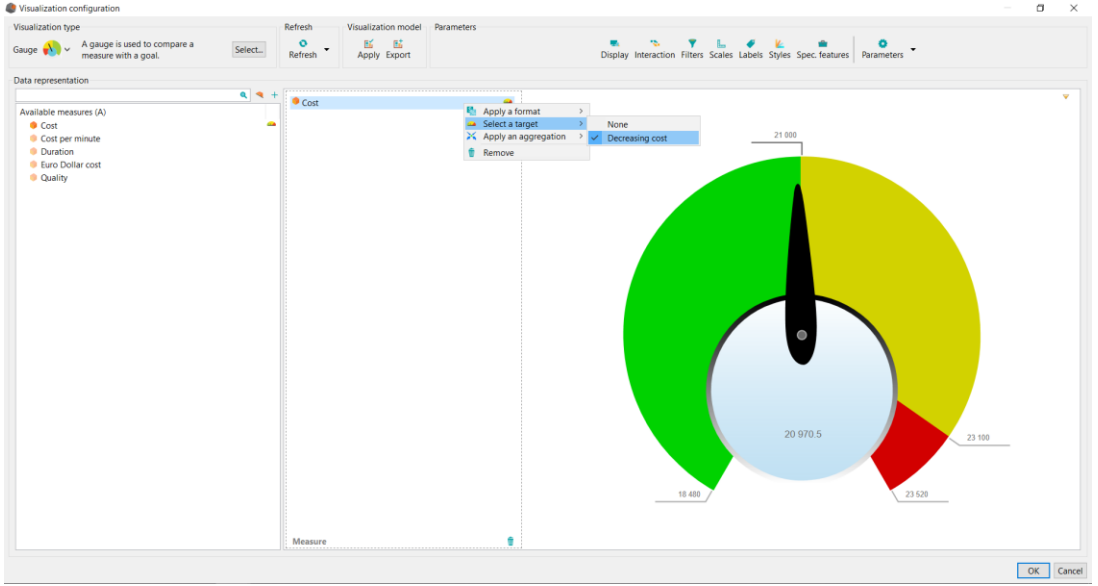
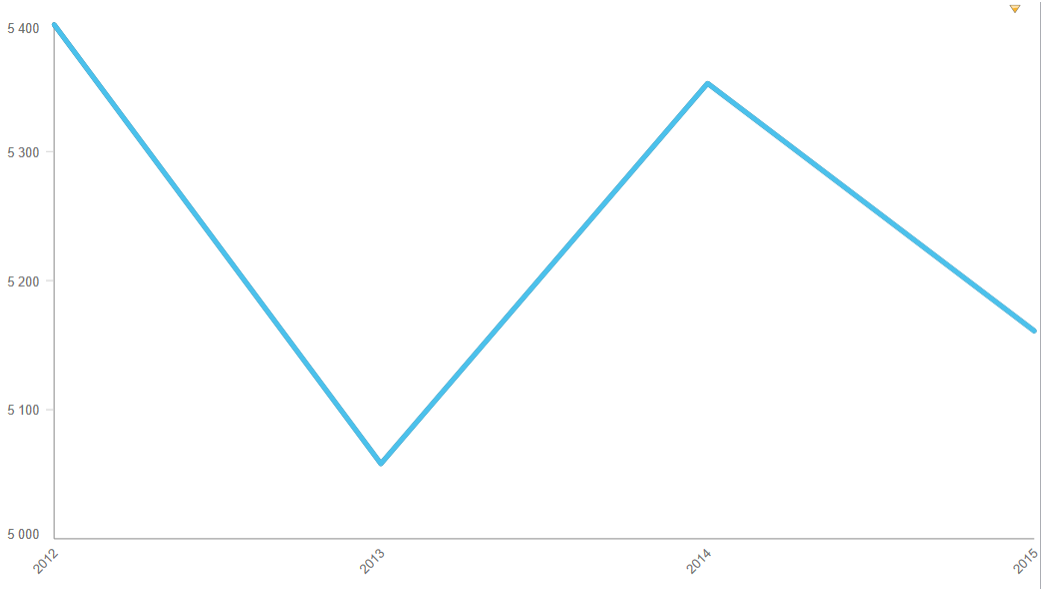


Chart creation: “Simulation Euro Dollar”

Chart creation: “Simulation Euro Dollar”

Objective : show the impact of Euro/Dollar change on the communication cost.

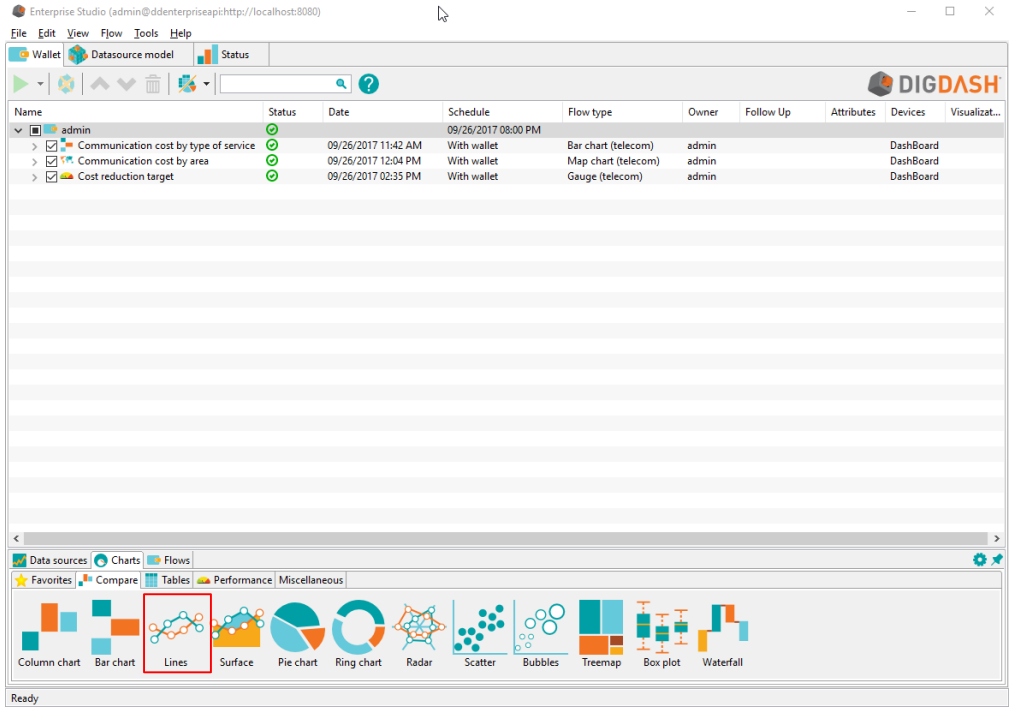
This chart uses the “telecom” data model previously created.



Step 1: Select an existing data model

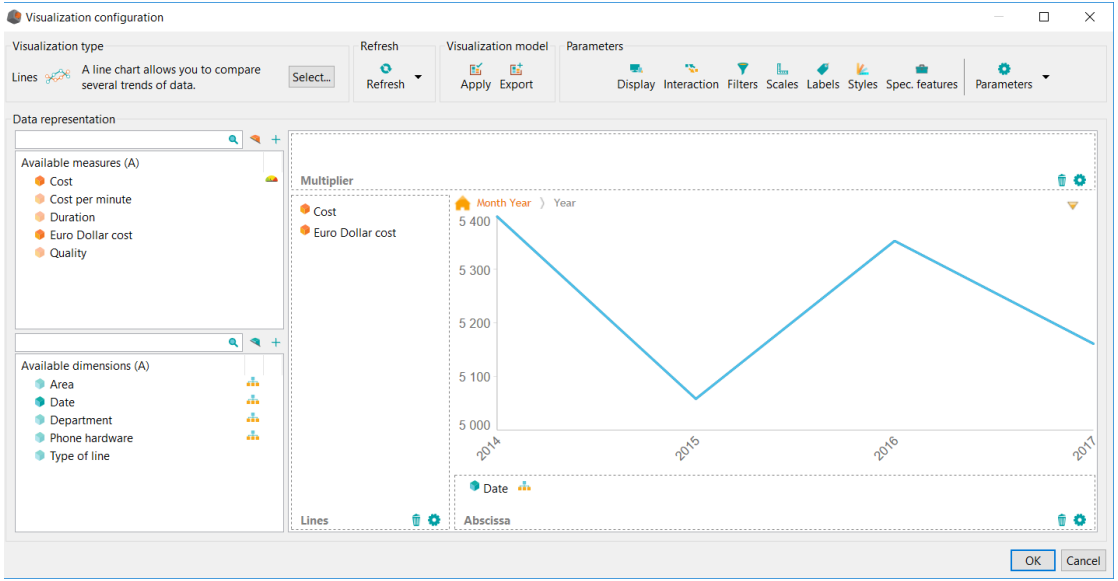
Create a line chart (**Lines** in the **Compare** category).

The window **Datasource model manager** appears. Select **“telecom”** and click **OK**.



Step 2: Visualization configuration

- Drag & drop the measures **Cost** and **Euro Dollar Cost** on the **Lines** axis**.**
- Drag & drop the dimension **Date** on the **Abscissa** axis. Right-click on **Date** and choose the **Month Year** hierarchy at the level **Year.**

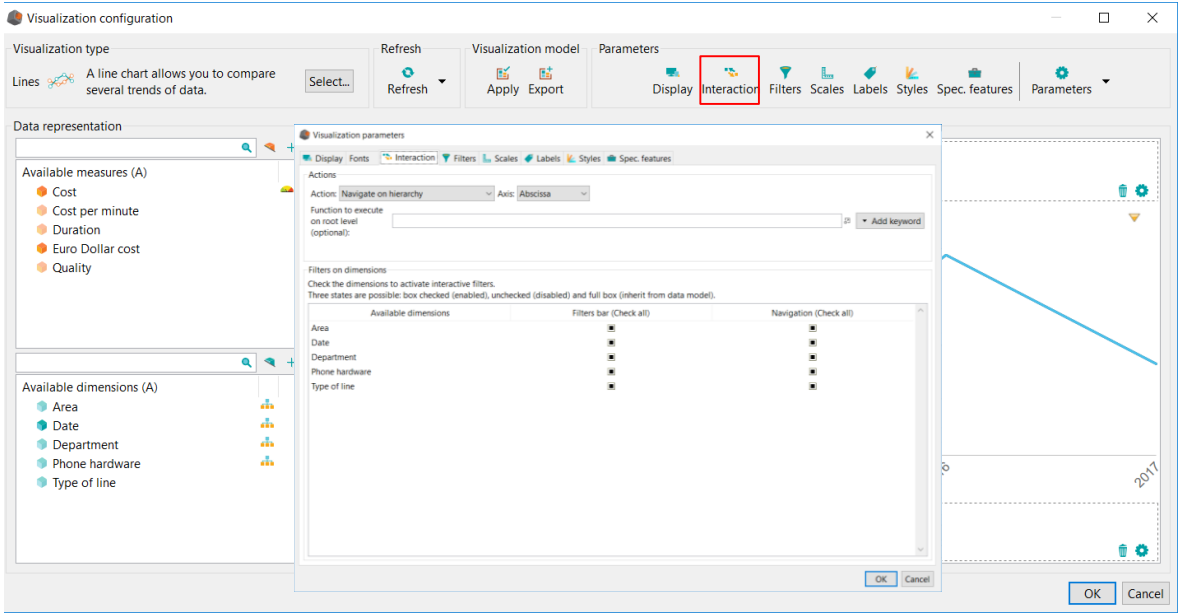


Step 2: Visualization configuration

Click on **Interaction**.

In the **Action** drop-down list, select **Navigate on hierarchy**, then select **Axis Abscissa**.

Click OK to close the **Visualization parameters** window then **OK** to close **Visualization configuration**.

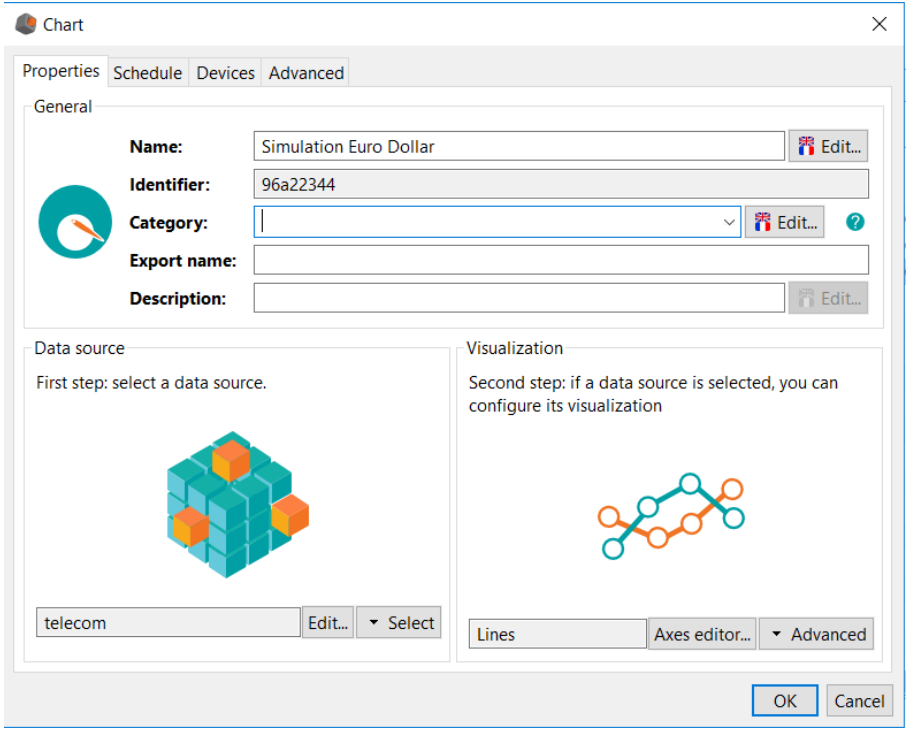


Step 2: Visualization configuration

Rename the chart to **Simulation Euro Dollar**.

Click **OK** to close the **Chart** window.

The chart **Simulation Euro Dollar** is added to your wallet.

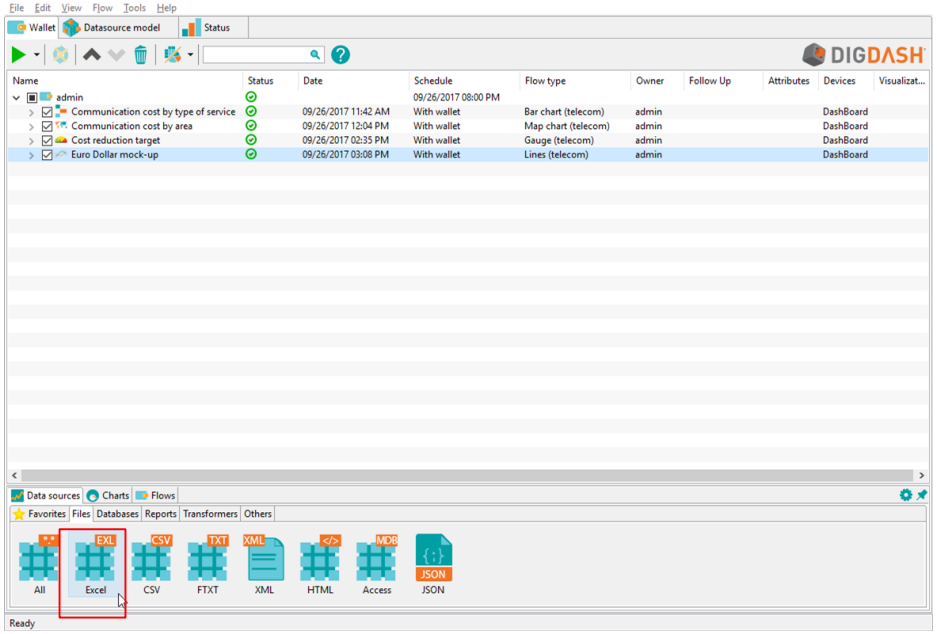


Data model creation: “retail”

Step 1: Import a data source

Objective : Import into **DigDash Enterprise** the Excel file “retailen.xls” (included) which represents products sales in a fictive organization.

In the panel at the bottom of the main window select the **Data sources** tab then **Files** and **Excel**.

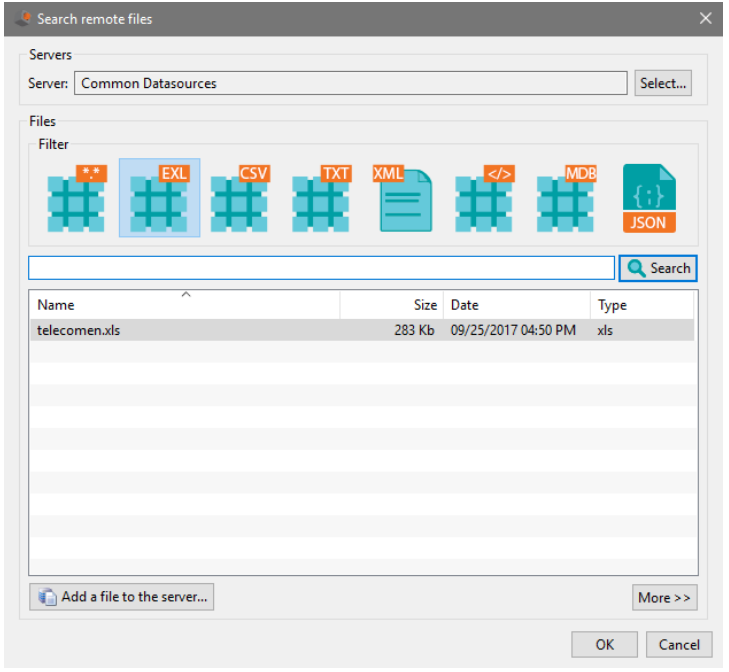


Step 1: Import a data source

The window **Search remote files** appears:

- Click on **Select** at the top then choose the documents server *"***Common Datasources***"*.

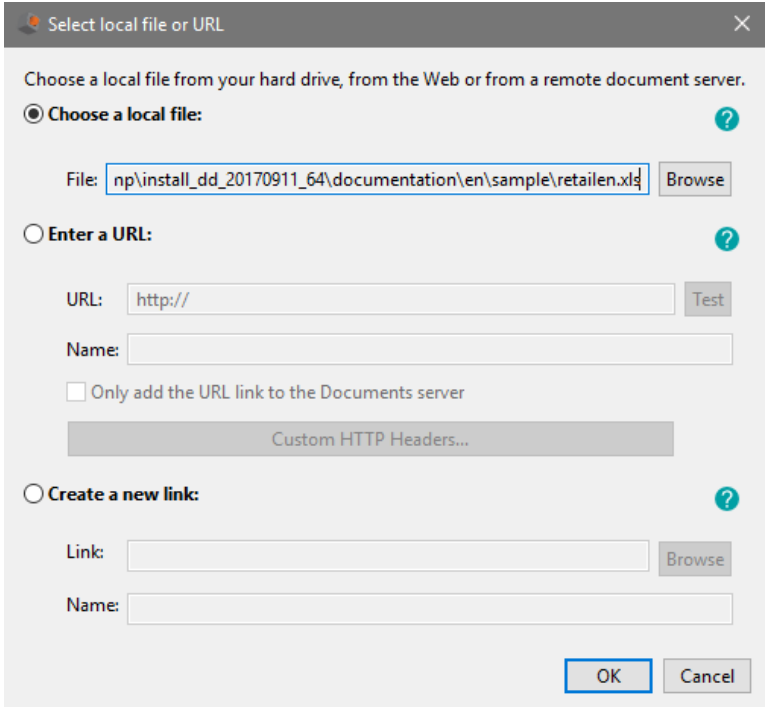
- Click "**Add a file to the server...**". The window **Select local file or URL** appears.



Step 1: Import a data source

Select **Choose a local file** then click on **Browse** to select the file “retailen.xls» which can be found in the folder **documentation\en\sample** of your installation directory.

Click **OK.**

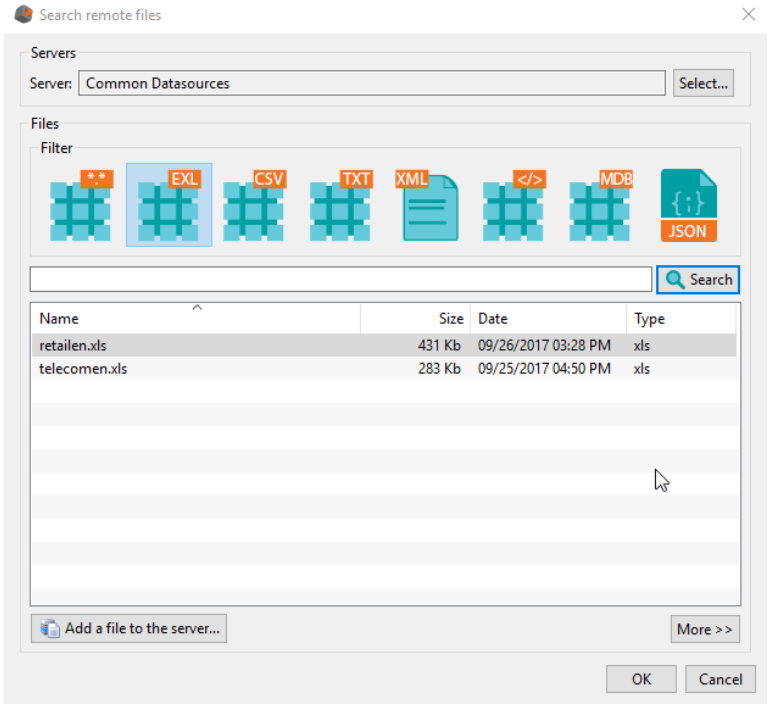


Step 1: Import a data source

The file is now saved on the DigDash server and accessible to all users.

NB : if you select the documents server “UserDocs », you will be the only one who can access the document.

In the window **Search remote files**, select “retailen.xls” then click **OK**.

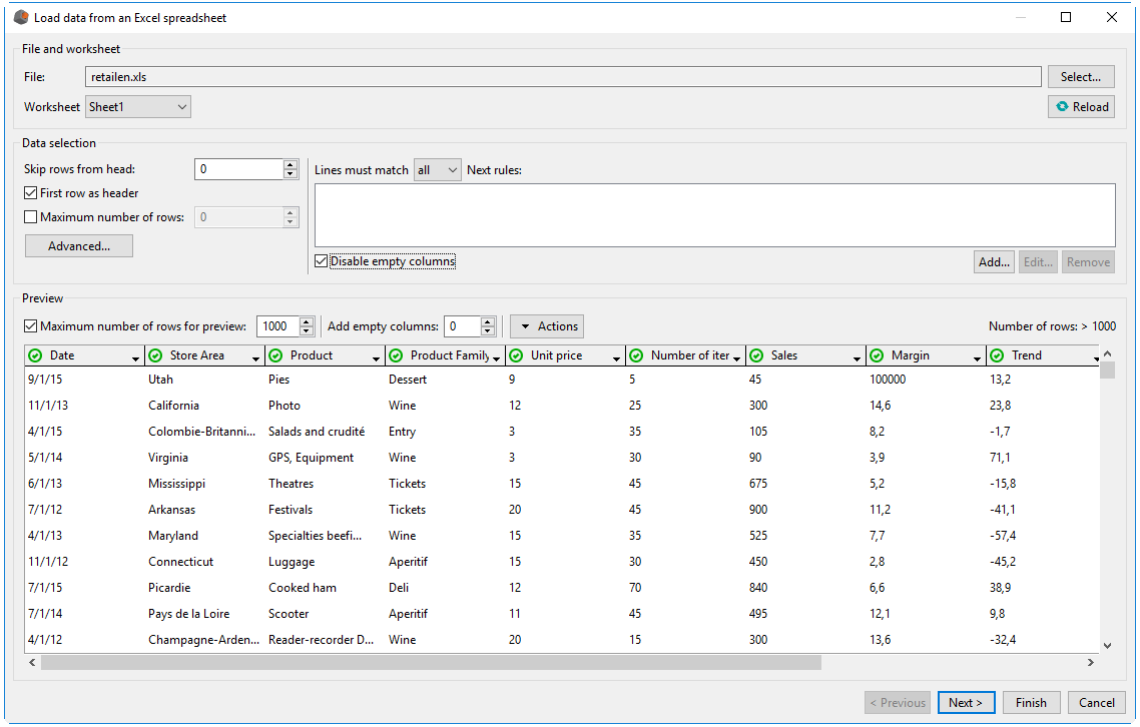


Step 1: Import a data source

The window **Load data from an Excel spreadsheet** appears.

Check the boxes:

- *First row as header*
- *Disable empty columns*



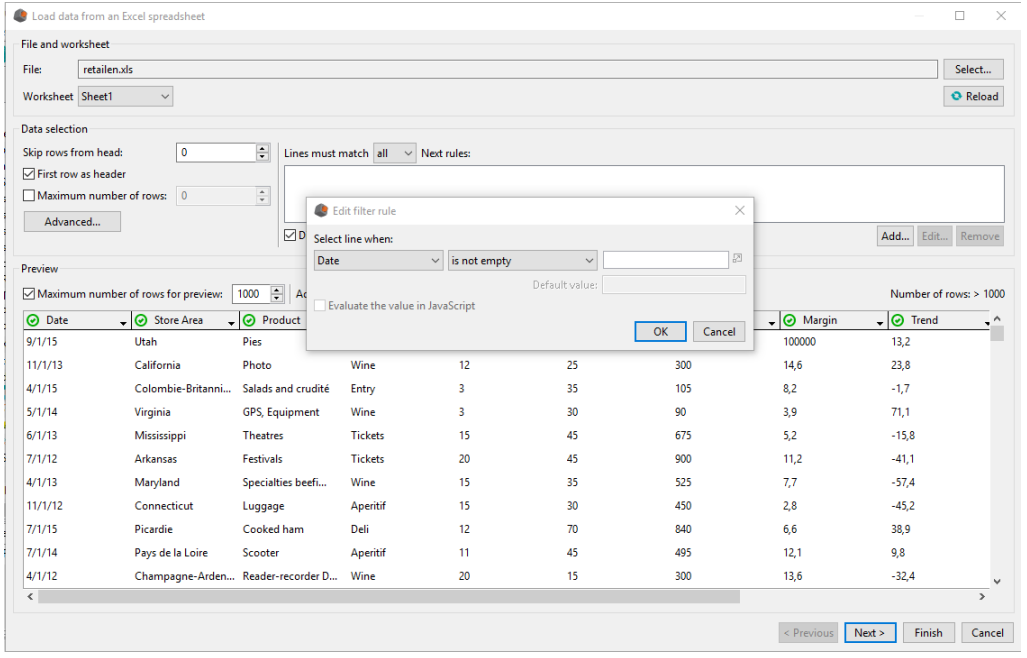
Step 1: Import a data source

Click **Add...** to the right of **Disable empty columns**.

The window **Edit filter rule** is displayed.

Leave the default values (**Date** in the first drop-down list and **is not empty** in the second drop-down list)

Click **OK** then **Next**.



Step 2: Configure the data model

Select « Store area » column and rename its identifier to « Area » (so that is can be linked to the Area column in telecom data model)

Rename the data model “retail”.

Click on **Finish** to save the data model, then **Create a new chart.**

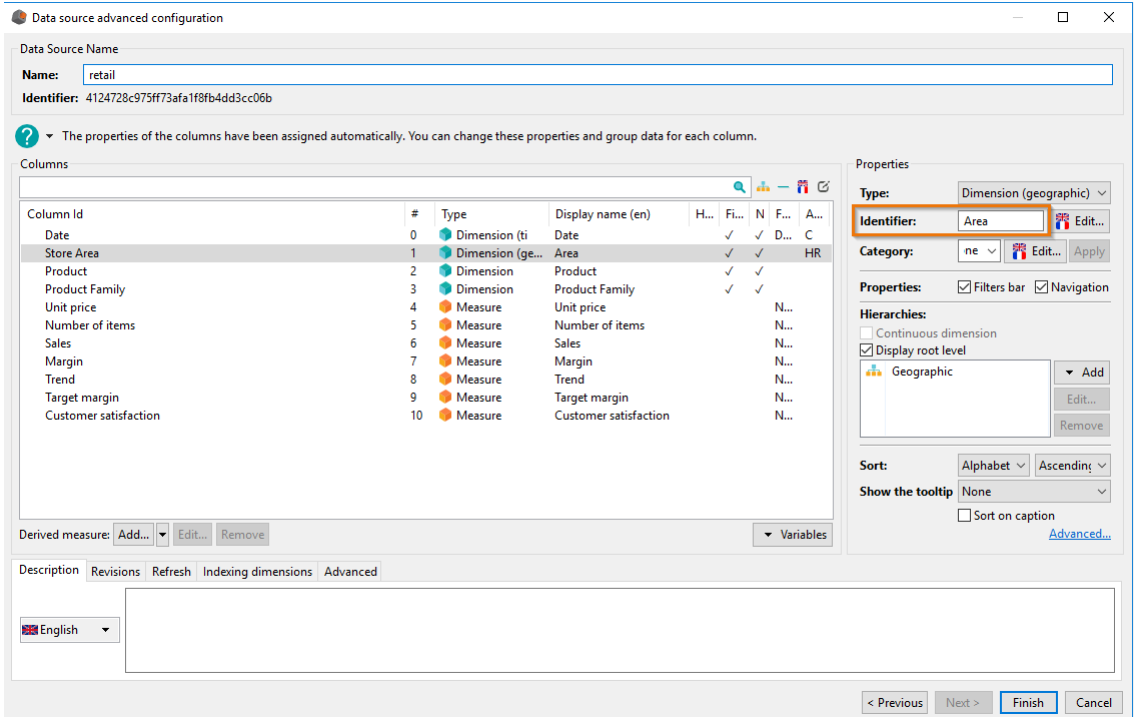


Chart creation: “Top 3 products”

Chart creation: “Top 3 products revenue”

Objective : create a cross table showing the 3 best material revenue. Show the revenue trend and Margin goal as icon.

Your cross table use the “retail” data model.

Area	Veal			Scooter			Theatres		
	Sales	Target margin	Trend	Sales	Target margin	Trend	Sales	Target margin	Trend
Mississippi		●	●	1 500	▼	▲	1 515	●	▲
Pays de la Loire		●	●	795	▼	▼	150	●	▲
Missouri		●	●	165	●	▼		●	●
Manitoba	1 740	●	▲	375	●	▲	2 285	▼	▼
Tennessee	1 500	●	▲	2 035	●	▲	275	▼	▼
Northwest Territories		●	●		●	●	1 440	▼	▼
Northern Ireland	50	●	▲	1 480	▼	▼	315	▼	▲
Michigan		●	●	405	▼	▼		●	●
Alabama	225	▼	▼	585	●	▲		●	●
Maine	120	●	▼	1 105	▼	▼	1 740	▼	▲
Indiana	180	●	▼	1 020	●	▲	540	●	▲
Wisconsin	600	▼	▼	630	●	▲		●	●
New York		●	●		●	●	430	●	▲

Visualization configuration

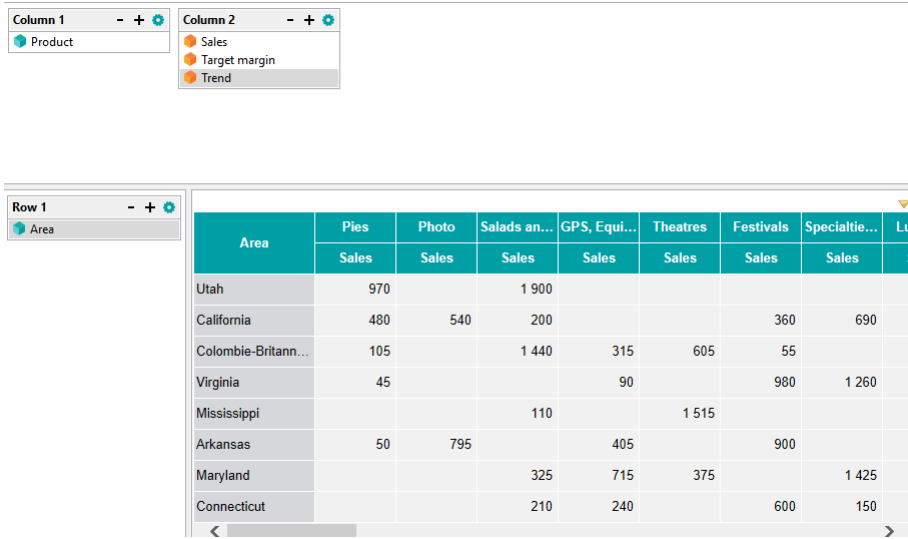
Create a **Cross table** chart, then add two columns and drop in:

Column 1 : *Product*

Column 2 : *Sales, Target Margin and Trend*

Line 1 : *Area* and remove the hierarchy.

Right click **Target Margin** and select a new format : “**Target (Icon)**”. Do the same with **Trend** and the format “**Trend (Icon)**”.

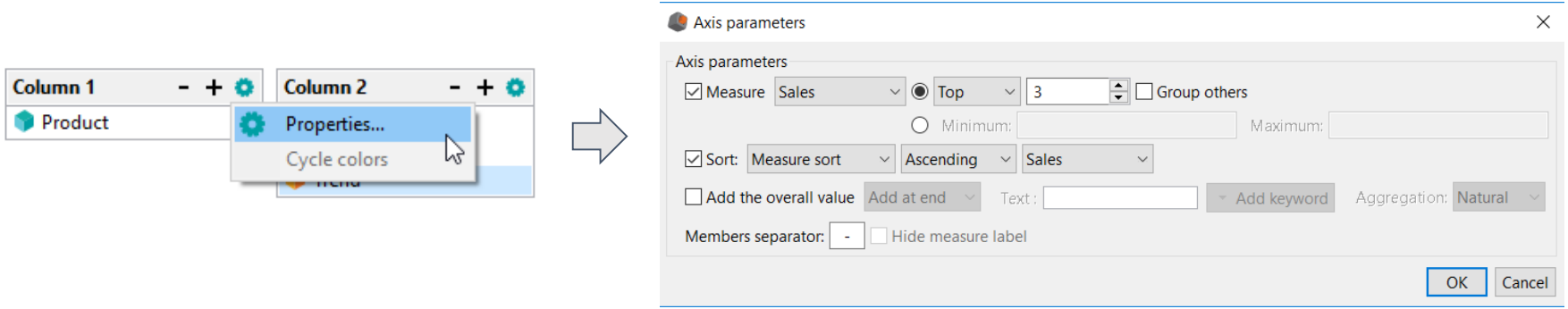


Area	Pies	Photo	Salads an...	GPS, Equi...	Theatres	Festivals	Specialtie...	Lu
	Sales	Sales	Sales	Sales	Sales	Sales	Sales	
Utah	970		1 900					
California	480	540	200			360	690	
Colombie-Britann...	105		1 440	315	605	55		
Virginia	45			90		980	1 260	
Mississippi			110		1 515			
Arkansas	50	795		405		900		
Maryland			325	715	375		1 425	
Connecticut			210	240		600	150	

Visualization configuration

Click the star wheel in the upper right corner of "Column 1".

Show the 3 best products sales and apply an ascending sort.



Close the **Visualization configuration** window and rename the chart “**Top 3 products**”.

Visualization configuration

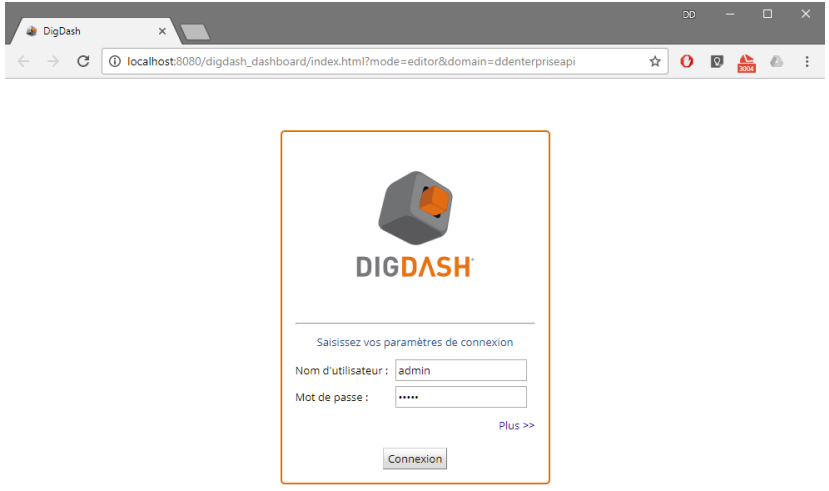
Area	Veal			Scooter			Theatres		
	Sales	Target margin	Trend	Sales	Target margin	Trend	Sales	Target margin	Trend
Mississippi		●	●	1 500	▼	▲	1 515	●	▲
Pays de la Loire		●	●	795	▼	▼	150	●	▲
Missouri		●	●	165	●	▼		●	●
Manitoba	1 740	●	▲	375	●	▲	2 285	▼	▼
Tennessee	1 500	●	▲	2 035	●	▲	275	▼	▼
Northwest Territories		●	●		●	●	1 440	▼	▼
Northern Ireland	50	●	▲	1 480	▼	▼	315	▼	▲
Michigan		●	●	405	▼	▼		●	●
Alabama	225	▼	▼	585	●	▲		●	●
Maine	120	●	▼	1 105	▼	▼	1 740	▼	▲
Indiana	180	●	▼	1 020	●	▲	540	●	▲
Wisconsin	600	▼	▼	630	●	▲		●	●
New York		●	●		●	●	430	●	▲

Close the **Visualization configuration** window and rename the chart “**Top 3 products**”.

Dashboard creation

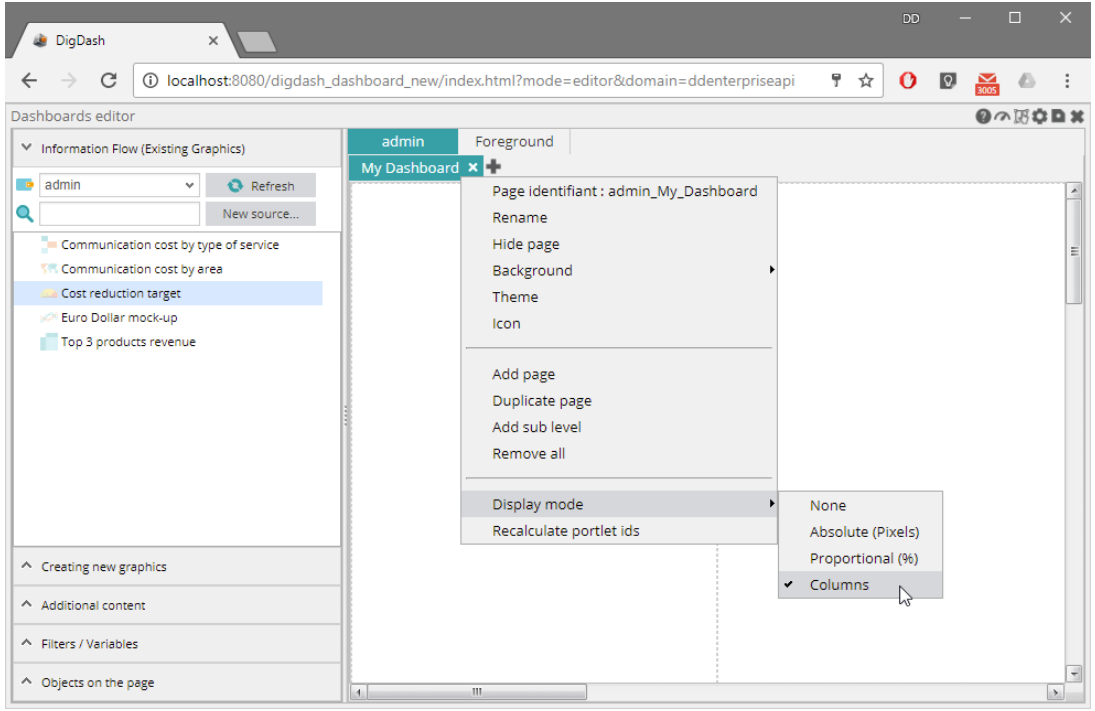
Dashboard configuration

Go back to the application **StartDigDash.exe** and click on “**Dashboard editor**” under **Execute**.



Dashboard configuration

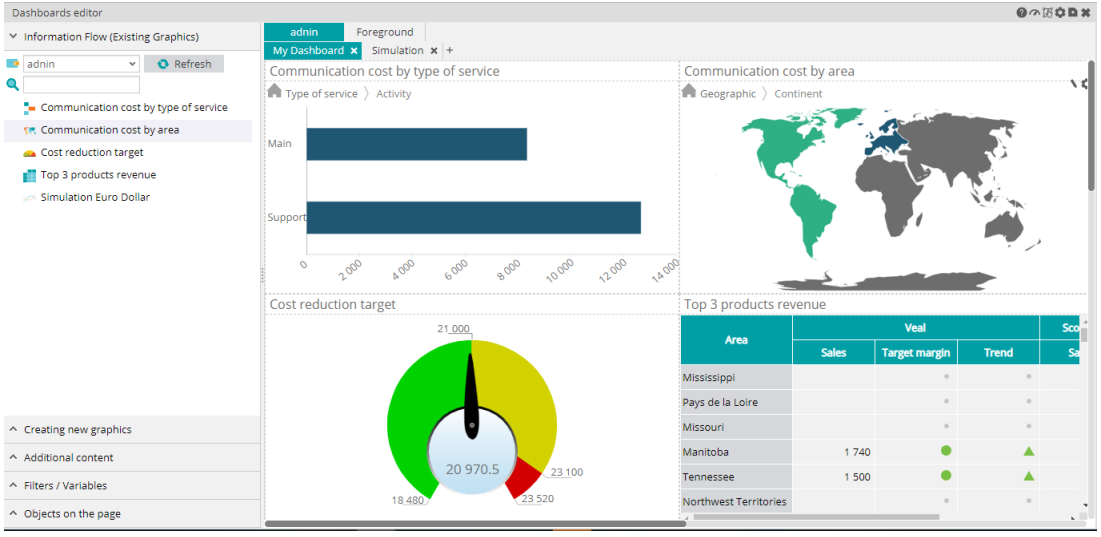
Right-click the tab “**My Dashboard**” and change the **Display Mode** to **Columns**. This will divide the page in two areas where elements are automatically sized and positioned.



Dashboard configuration

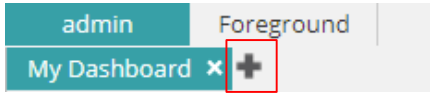
From the left side panel, drag & drop the following charts:

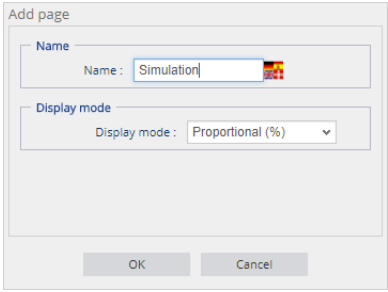
- *Communication cost by type of service*
- *Communication cost by area*
- *Cost reduction target*
- *Top 3 products revenue*



Dashboard configuration

Create a new page and name it **Simulation**.

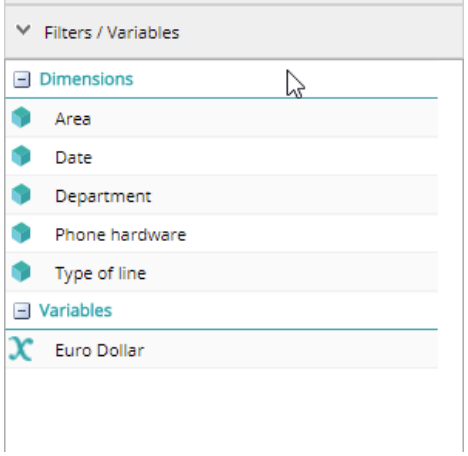




Drag & drop in your new page the chart **Simulation Euro Dollar** from your wallet.

Drag & drop the **Euro Dollar** variable from the tab **Filters / Variables**.

Do the same with **Type of line**.

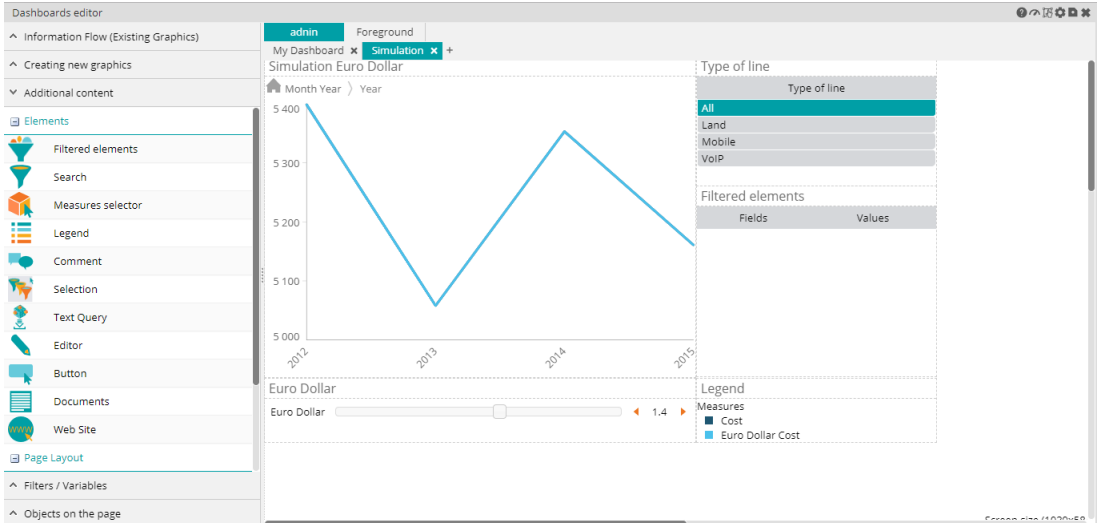


Dashboard configuration

Open the **Additional content** in the left panel and drag & drop in your page the following elements:

- Filtered elements
- Legend

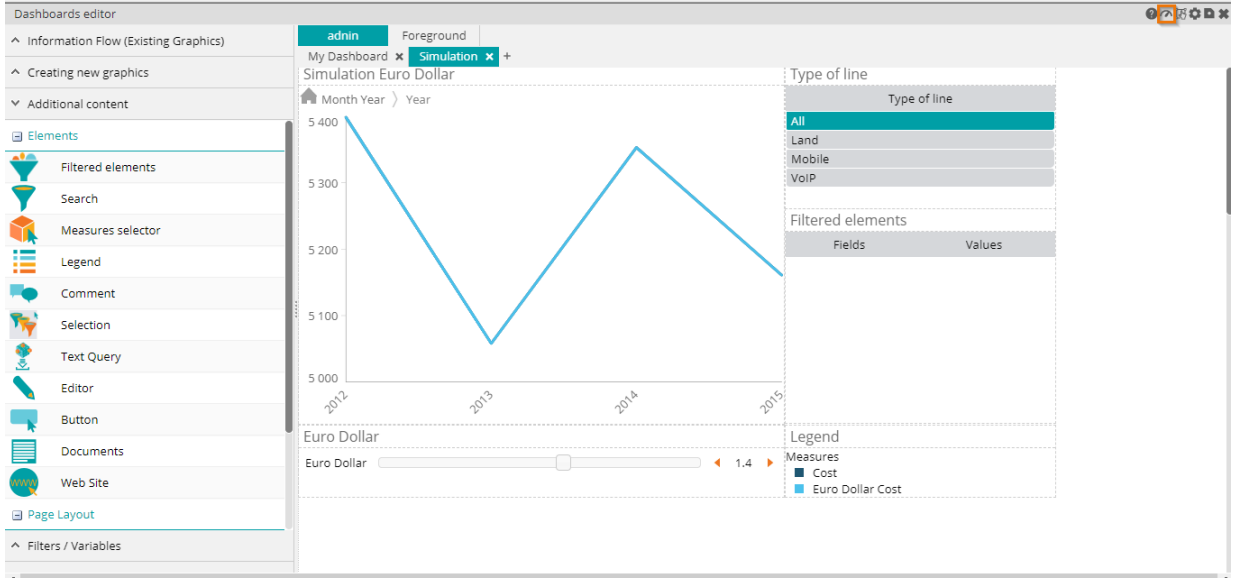
Click on  at the top right corner of your screen to save your dashboard.



Access dashboard

Access dashboard

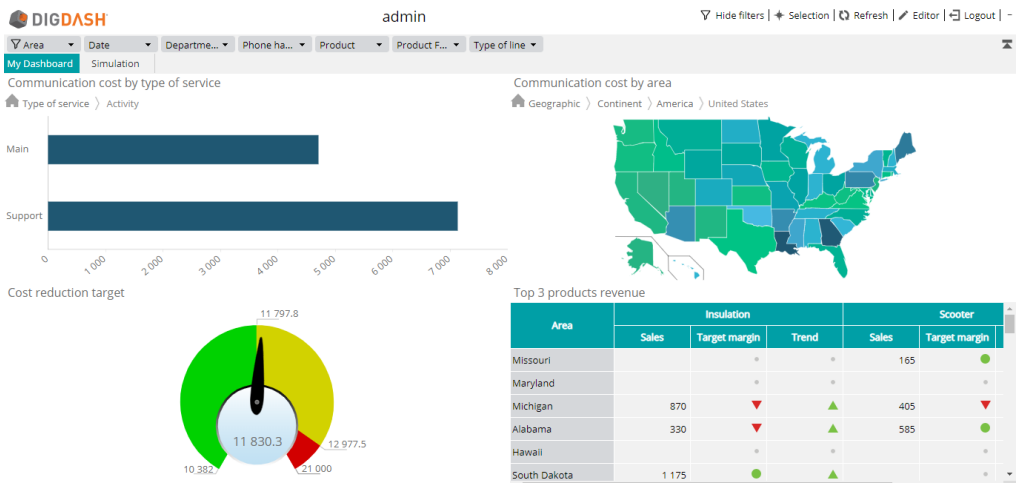
Click on the second icon at the top right corner to access the dashboard.



Access dashboard

On the first page, “My dashboard”, **Communication cost by area** shows the communication costs for America and Europe. Click on **America** to display the **cost by country**.

Click on “**United States**” to display the **cost by state**. Other charts on your page are filtered and display their values for the “**United States**” only.



Access dashboard

Open the page “Simulation” and move the cursor “Euro Dollar” to display the change rate effect on communication cost.