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RubiSight User Guide Home

Introduction to RubiSight

What is RubiSight On the Rubiscape platform, RubiSight is a visual data storytelling dashboard with simple drag-and-drop functionality. Once the ML model is ready, it can be displayed on the dashboard in RubiSight. It is a cloud-powered visual data explor READ MORE

Getting Started

Rubiscape is an innovative data science platform that is a one-stop solution to all your data analysis and forecasting requirements. Whatever be the stage of your data analytical cycle, the Rubiscape platform surely has a product to fulfill your requireme READ MORE

Widgets in RubiSight

In RubiSight, charts are referred to as widgets. They are available in the widgets pane. The available types of charts and their uses are explained in the sections given below. image2024-6-21_11-1-11.png READ MORE

Using Miscellaneous Features in Rubiscape

As a user, you should know some of the basic activities that you can perform on the Rubiscape home page. You can change the view of the items on the home page from card view to list view and vice-versa. You can set a dashboard, workbook, workflow, or a da READ MORE

Working with Dashboards

What is a Dashboard A dashboard is a graphical user interface (GUI), displaying all the key performance indicators at a glance. In short, it is a progress report generated to gauge the performance of a process, business, and so on. In Rubiscape, a dashboa READ MORE

Working with Widgets

What is a Widget A widget is a RubiSight dashboard component that can be a chart, a graph, a map, a card, an image, or a table. Each of these widgets has a specific purpose and is used to enhance the visual appeal and the presentation of the data. These w READ MORE

Using Parameters in RubiSight

In RubiSight, two types of user-defined values are available, Calculated Column Parameters A Calculated Column is created as a new column created that was not a part of the original dataset. The new column is related to one (or more) of the existing READ MORE

Performing Miscellaneous Tasks

Along with formatting charts and axes, there are a few miscellaneous tasks that you can perform on your dashboard, as listed below. Update Name and Description of Dashboard Add Comments to Dashboard Use Annotations in the Dashboard These tasks are explain READ MORE

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- Deleting a User Data (Rubiscape User Guide)
    - No labels
- API Based Workflow Execution (Rubiscape User Guide)
    - No labels

Introduction to RubiSight

What is RubiSight

On the Rubiscape platform, RubiSight is a visual data storytelling dashboard with simple drag-and-drop functionality.

Once the ML model is ready, it can be displayed on the dashboard in RubiSight. It is a cloud-powered visual data exploration experience.

RubiSight enables business users to achieve faster dashboard turnaround and provides flexibility in tapping data for any subject area. It does not require you to know coding or any specific technical skills.
In RubiSight, you can use various charts, graphs, tables, and maps to represent data effectively. Each graph has its own set of characteristics and, as such, is used for different purposes.

You can add several charts in a single dashboard that give complete visibility of all KPIs/ data trends in one sight, making the decision-making process faster.
These charts are further customizable according to the look and feel of your brand. This takes care of your brand value.

Your Rating:

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- What is RubiSight

Features of RubiSight

Some of the key features of RubiSight are given below.

Data

- Import data from various sources such as Relational databases, Excel spreadsheets, CSV files, text files, social media, Google News, and so on.
- View the descriptive statistics on measures immediately for gauging your data characteristics.

Discovery

- Start exploring your data instantly from an intuitive and point-and-click interface.
- Explore data seamlessly in the cloud, which leverages your database to increase data comprehension.
- Experience interactive data discovery to easily identify the relationships, trends, outliers, and so on. This feature especially empowers business users and analysts.
- Stack or group your items effectively using precise and responsive capabilities that give you flexible layout and design options.
- Choose from a plethora of widgets or charts like Bar, Pie, Donut, Histogram, Bubble, Sunburst, Treemap, Pareto, and so on to enhance your data visualization experience.
- Select from an array of analytical visualization plots such as Box Plot, Waterfall Chart, and so on.
- Use the Sankey diagram for path analysis to visualize the relationships between distinct sequence of events.
- Use Line Charts to generate forecasts swiftly while also including the forecasting confidence intervals.
- Add web content like YouTube videos or web apps and images like logos to your report.
- Use one-click filtering (one-way or two-way) and the linked selections for data visualization and reports. This helps you to avoid the tedious process of manual linking of content.
- Synchronize the selection and filters across visualization in a dashboard or a report.
- Alter the measures, change the chart types, and format the charts easily so that you can make business decisions instantly.
- Use the power of key-value visualization to display important metrics such as numerical or categorical values in an infographic style for quick reference.

Augmented Analytics

- Use Automated Explanation to detect and highlight patterns and outliers in your data.

Sharing and Collaboration

- Create projects that share data, content, and other resources with fellow project members.
- Share insights as you explore new datasets.

Security and Administration

- Use the power of the Rubiscape Administrator module (an easy-to-use, web-based, and centralized administration) to monitor your BI (Business Intelligence) and analytics environment. This includes users, data, content, servers, services, and security.
- Experience user authentication and content authorization support governance.

Rubiscape Smart Caching

- Line up data collection, ETL (Extraction, Transformation, and Loading of data), and data imports to the freshest data available. Reduce the stress on your database.
- Create data visualizations in one click.
- Drag and drop data to create graphs from over 30 built-in options. Enhance your data exploration and get instant visual insights.
- Use Rubiscape dashboards to publish and share your insights with business stakeholders.

Your Rating:

Table of Contents

- Data
- Discovery
- Augmented Analytics
- Sharing and Collaboration
- Security and Administration
- Rubiscape Smart Caching

Advantages of RubiSight

Faster dashboard turnaround

RubiSight enables rapid switching between dashboards.

It reduces the time for transposition of data visualization charts and helps faster presentations and understanding.

Thus, a faster turnaround helps in facilitating faster correlation between charts.

Flexibility for any subject area

RubiSight can be used to create graphical visualizations for any kind of data, be it numerical, textual, categorical, or interval (date).

Thus, data from any data source such as business, social sciences, journalism, or space technology can be represented on the RubiSight dashboard.

Consistent user experience

RubiSight gives a visually as well as functionally consistent user experience.

The color scheme, a visually appealing design, the use of the most popular and useful widgets, and easy-to-perform filtering and formatting make RubiSight user-friendly.
This consistency enables users to learn the accurate utilization of the provided widgets faster. It eliminates confusion and saves time in building a dashboard.

Less intensive user training

The widgets and their formatting are pretty simple and do not require any special training in data visualization or mathematics and statistics.

Any user can create visually appealing dashboards easily on RubiSight.

Branding and Design control

Brands and designs are prized assets for any organization or company.

They are not only unique but also function as the flag-bearers for the organization.

Customers identify products and companies from their brands and designs.

Your Rating:

Table of Contents

- Faster dashboard turnaround
- Flexibility for any subject area
- Consistent user experience
- Less intensive user training
- Branding and Design control

Applications of RubiSight

RubiSight is a cloud-powered visual data exploration experience that enables business users to access, prepare, analyze, and present findings in their data. For this, the user need not necessarily have technical skills or a background in coding.

RubiSight can connect to various data sources and enable organizations to scale their business analytics capabilities to millions of users. It delivers fast and responsive query performance by using a robust Rubiscape.io engine.
Due to its versatility in the choice of widgets and flexibility in their configuration, RubiSight finds various applications in different sectors. Below is a list of some of the industry verticals where RubiSight is employed.

- Manufacturing
- Government
- Pharma
- Retail
- Energy
- Healthcare
- Education
- Logistics and Transportation
- Telecom
- Information Technology
- Banking, Finance Services, and Insurance (BFSI)
- Scientific Research
- Military
- Life Sciences
- Hospitality
- Media and Communications

Your Rating:

Getting Started

Rubiscape is an innovative data science platform that is a one-stop solution to all your data analysis and forecasting requirements. Whatever be the stage of your data analytical cycle, the Rubiscape platform surely has a product to fulfill your requirement.
Rubiscape is a web-based application. No installation is required. You can start using the application by signing in from a web browser.

Your Rating:

Signing into the Application

Note :	You can sign in to Rubiscape, practically from any web browser. Google Chrome is mostly recommended owing to its compatibility with the Rubiscape platform.

To sign into the application, follow the steps given below.

1. Enter the Rubiscape URL in your web browser. The Rubiscape sign-in page is displayed.
2. Enter the provided **Username** and **Password**.
3. Click **Sign In**.

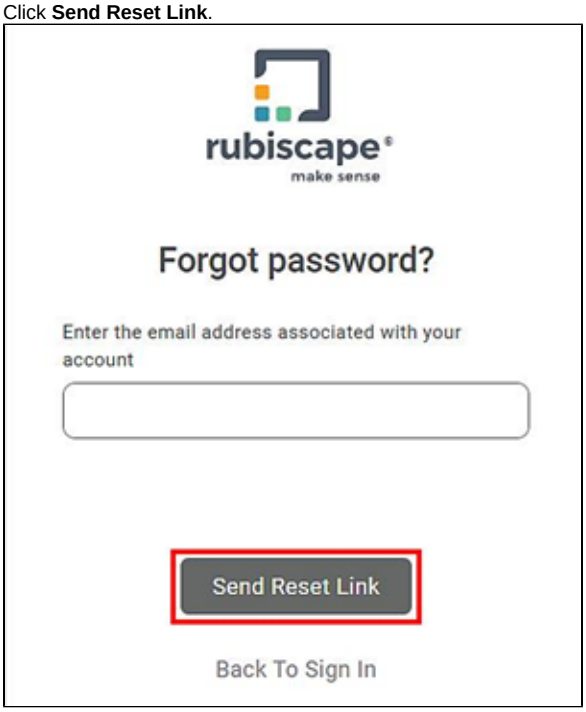
The Rubiscape home page is displayed.

Your Rating:

Resetting the Password

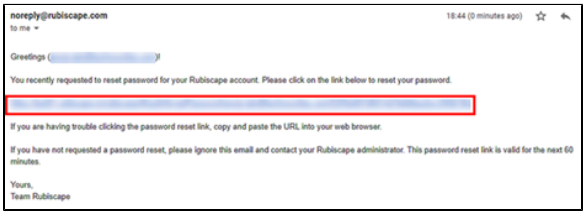
In case you forget the password, you can reset your password with a new one. To reset your password, follow the steps given below.

1. On the login page, click **Forgot password?** below the password field. *Forgot Password* dialog box is displayed.
2. Enter the email address associated with your account.
3. Click **Send Reset Link**.



A message confirming that a link is sent via email to reset your password is displayed.

4. Go to your email account and open the auto-generated email received in your inbox. Do not reply to this email.
5. Click the link to reset your password.



You are redirected to the Rubiscape reset password page.

6. Enter a new password in the **Reset Password** field.
7. Re-enter the same password in the **Confirm Password** field.

Notes :	• The password should have a minimum of 8 characters. It should contain at least one uppercase, one lowercase, one special character, and one number. • Make sure that the password is strong enough. DO NOT share the password with anyone. This will ensure the confidentiality of your data.

8. Click **Reset Password**. The password is reset, and a confirmation message is displayed

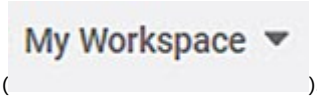
Your Rating:

Changing the Workspace

A workspace is a place where you can manage multiple datasets and projects. Workspaces are the parent structures that include datasets and projects. Workspaces are mapped to the login, which means you may have limited access to specific workspaces as defined by your administrator. Users can select any workspace, in which they want to work, directly from the home page.

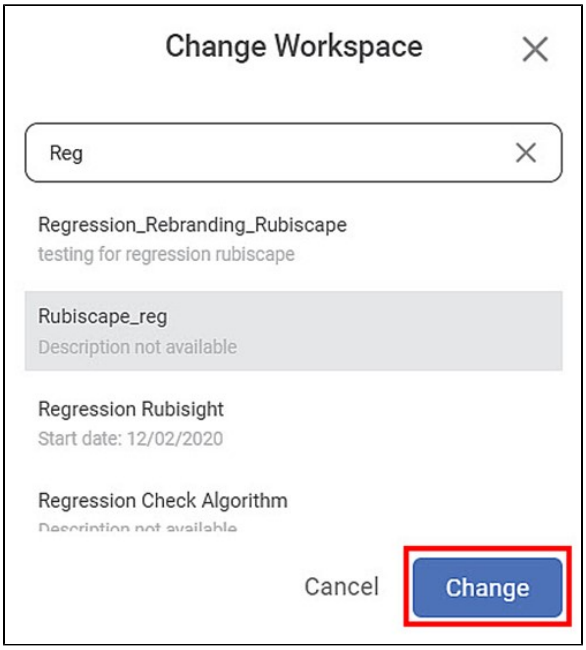
Notes:	• A workspace can be created only by the administrator and NOT by the user. • Users can only perform tasks on the workspace assigned to them, by the administrator. • User cannot modify or delete a workspace. This can be done only by the administrator.

To change a Workspace, follow the steps given below.

1. On the title pane, click the Workspace Name (

). The *Change workspace* page is displayed.
2. In the drop-down list, type the name of a workspace in the **Search.**
3. Click **Change.**

Note:	You can also scroll down the list of workspaces to select the desired workspace.



The selected workspace is opened.

Your Rating:

Logging Out of the Application

To log out from Rubiscape, follow the steps given below:

1. On the title pane, click the user icon ().
2. Click **Log out**.
   You are logged out of Rubiscape.

Your Rating:

Widgets in RubiSight

In RubiSight, charts are referred to as widgets. They are available in the widgets pane. The available types of charts and their uses are explained in the sections given below.

Your Rating:

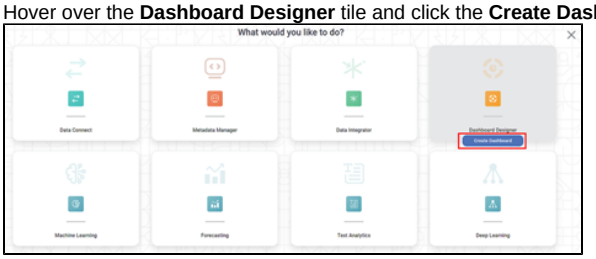
End-to-End Dashboard Creation

`Dashboards help visualize your data from an extraordinary perspective. The same data, when explored using different visualization charts, can give diverse insights. These insights accelerate the decision-making process. In RubiSight, dashboards can be created very easily, using the following steps:

1. Start with a blank dashboard
2. Add your dataset to the dashboard
3. Select a chart/widget of your choice
4. Configure the chart/widget

This section demonstrates the basic dashboard creation process. To create a dashboard, and add a widget to it, follow the steps given below.

1. On the home page, click the **Create** icon ( ).
2. Hover over the **Dashboard Designer** tile and click the **Create Dashboard** button.



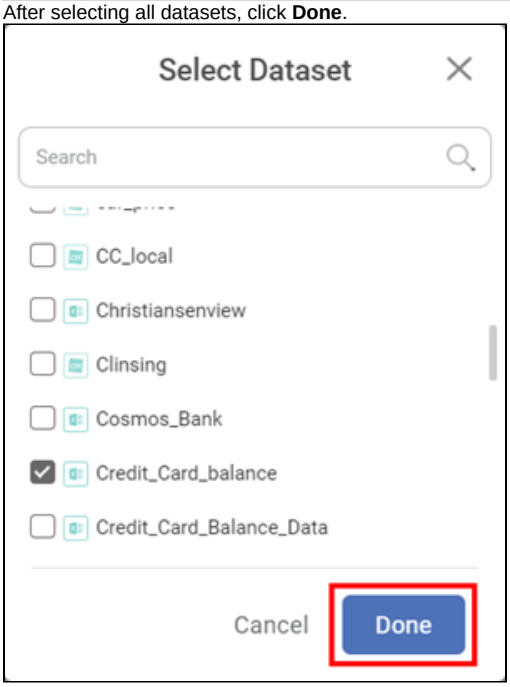
The *Create Dashboard* page is displayed.
3. Select the **Create new** radio button.
4. Enter the **Name** for your dashboard.
5. Enter the name in the **Project** field to create a new project.

Notes	• The dashboard is created under the entered project name. • You can also type the name of the existing project in the *Project* field to select the project. • The project name is mandatory.

6. Click **Select Dataset** in the **Dataset** field. The *Select Dataset* window is displayed.
7. Locate the dataset you want to add and select its corresponding check box.

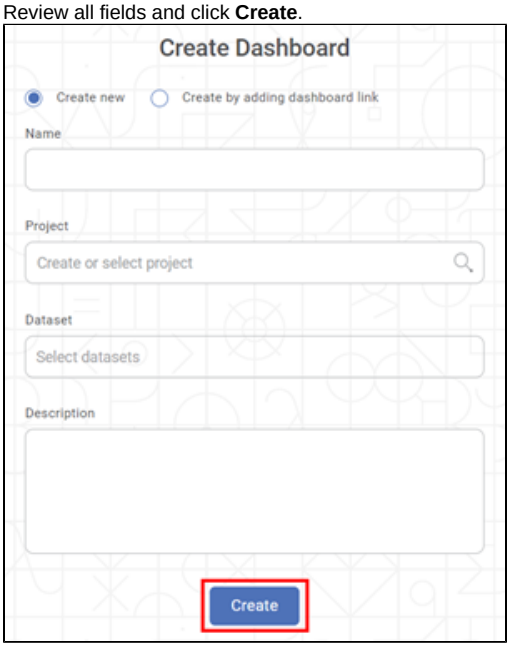
Notes	• You can also type the name of the dataset in the **Search** field to locate the dataset. • You can select multiple datasets.

8. After selecting all datasets, click **Done**.



9. Enter **Description** for your dashboard.

10. Review all fields and click **Create**.



The dashboard is created, and the dashboard canvas is displayed. Next, we plot a chart using the widgets available.

11. In the *WIDGETS* pane, click the widget you want to plot.

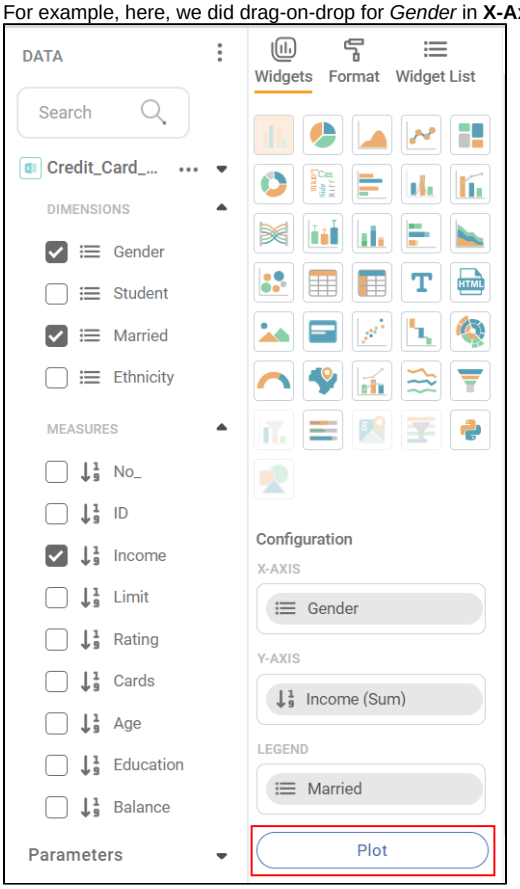
Note:	Hover over any widget to see its name and the number of dimensions and measures in it.

The selected widget is added to the dashboard canvas.

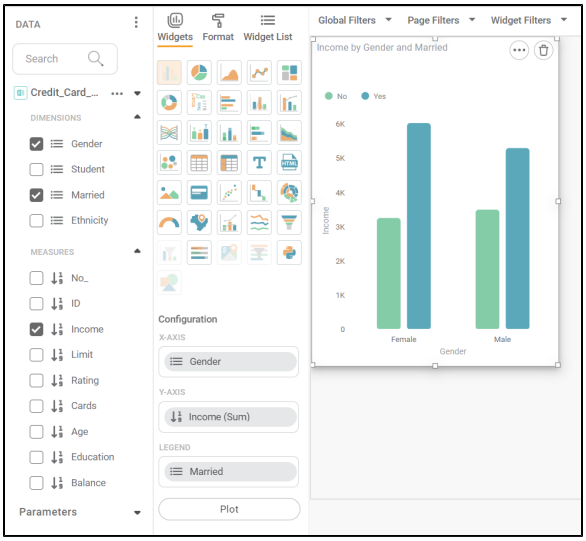
12. Select the added widget. For example, here we consider a Column Chart. *Configuration* settings are displayed in the WIDGETS pane.

Notes:	• You can add multiple widgets on one canvas. • The *Configuration* setting varies depending on the selected chart.

13. From the **DATA** pane, drag-and-drop the **DIMENSIONS** and **MEASURES** in the appropriate **Configuration** fields, and then click **Plot**. For example, here, we did drag-on-drop for *Gender* in **X-Axis**, *Income* in **Y-Axis**, and *Married* in **Legend.**



The chart is plotted depending upon the dimensions and measures added in the configuration. The dashboard looks as shown in the diagram below.

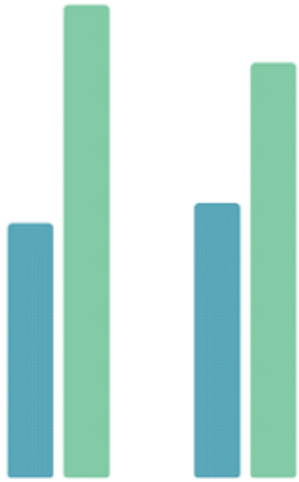


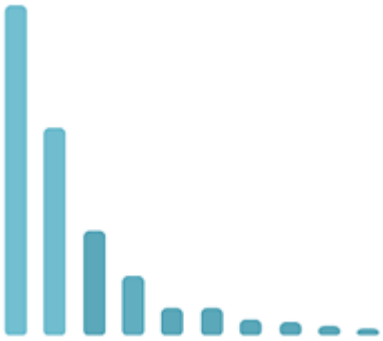
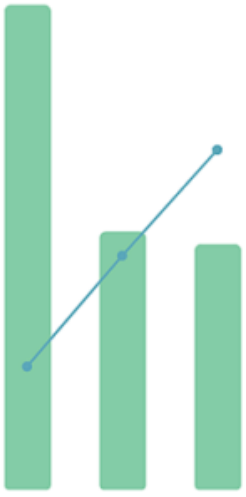
Here we included only one chart – the Column Chart. RubiSight supports multiple types of widgets to create charts. The next section briefly explains each of these widgets.
For more information about the widgets, refer to *RubiSight Widget Reference Guide*.

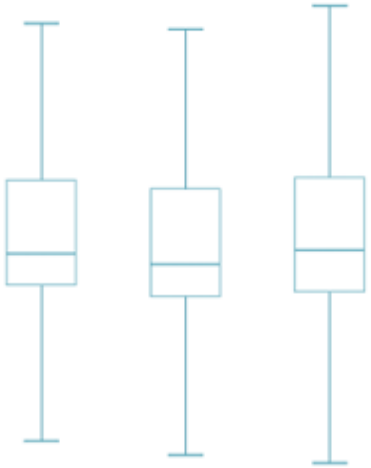
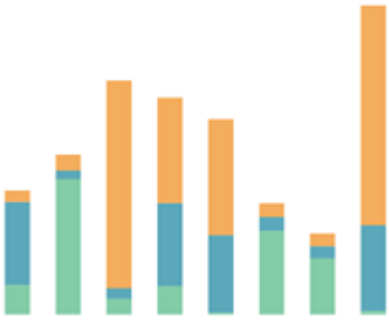
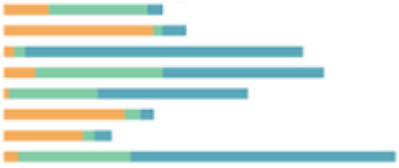
Your Rating:

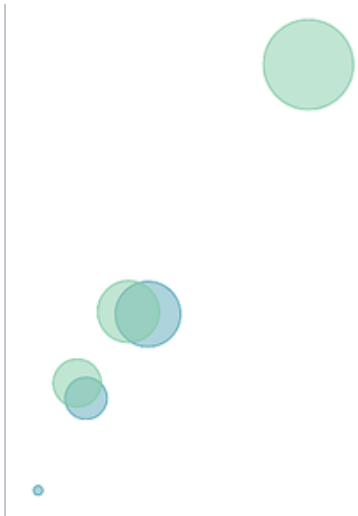
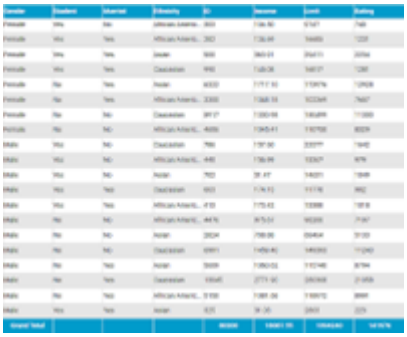
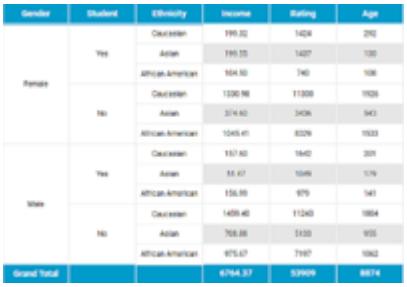
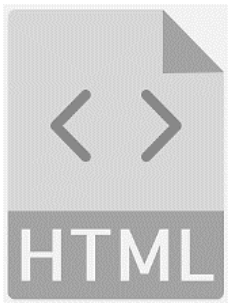
Uses of Widgets/Charts

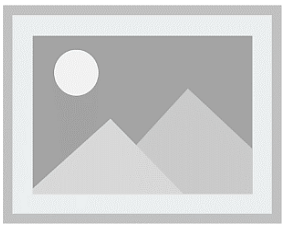
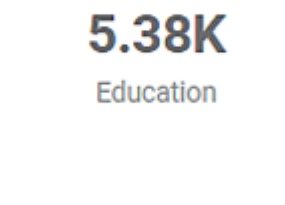
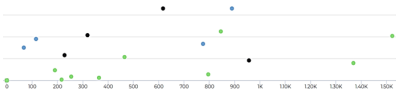
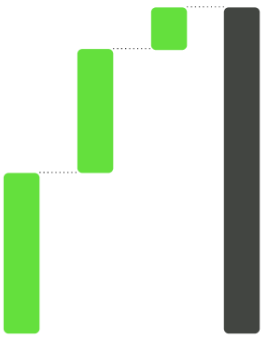
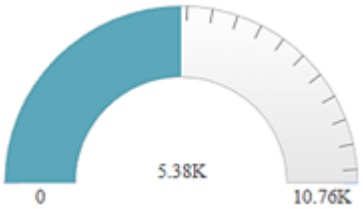
Charts are used to represent data graphically and effectively leverage the information hidden in it. Charts help comprehend huge amounts of data and the correlation between the different elements present in the data.
The table given below shows the uses of different types of widgets/charts available in RubiSight.

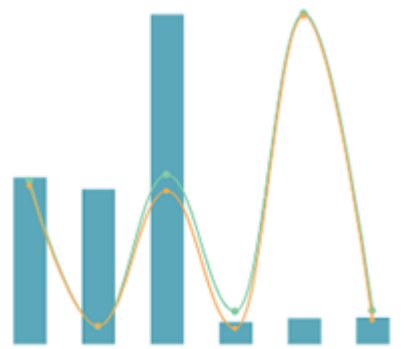
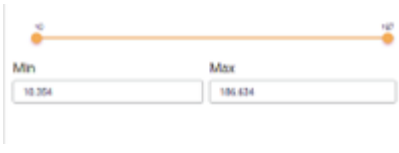
Chart/Widget/Table/Map	Name	Description
	**Column Chart**	• To compare a single category of data with respect to a certain variable. • *Example:* Change in GDP with time. • Can be used to represent both numerical as well as categorical data.
	**Pie Chart**	• To determine the composition of a variable in categorical data. • *Example:* To determine the constitution of air in the atmosphere. • To compare various categories within a single set of data • *Example:* To compare various areas of growth within a business. • Recommended to use when you have only one set of data with different features.
	**Area Chart**	• Similar to and roughly based on Line Charts • To display quantitative data. • To compare two or more quantities in numerical data. • To depict a time-series relationship. • *Example:* Variation in revenue from sales during each quarter in a financial year
	**Line Chart**	• Represent continuous variable. • To display the variation in a particular variable over a given time duration. • *Example:* Variation in the stock market index during one trading day.
	**Treemap Chart**	• To represent hierarchical data in a tree-like structure in the form of nested rectangles. • The varying size and color of rectangles are proportional to the data values represented by them. • *Example:* The representation of the population of countries in the European Union.

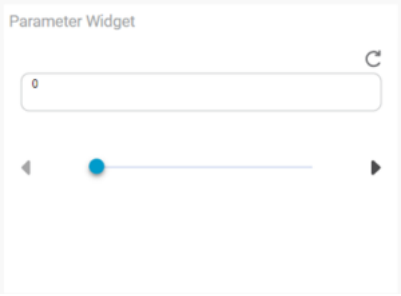
	**Donut Chart**	• Variation of the Pie Chart • To represent a part-to-whole relationship between various components of a variable. • *Example:* The representation of expenditure by government on various liabilities.
	**Word Cloud Chart**	• Also called the Tag Cloud or Weighted Data Chart. • To represent textual data visually. • The size of each word represents its frequency or the magnitude of the variable associated with it. • *Example:* The representation of various US cities based on the average sales of cars in the financial year.
	**Bar Chart**	• Similar to Column Chart but plotted horizontally. • To represent categorical data. • Rectangular bars of heights and lengths proportional to the values they represent. • *Example:* Gold medal tally of various nations in Olympic games.
	**Histogram**	• To show the distribution of measure values. • To identify data issues, including outliers. • To determine the center, spread, skewness, and multiple models in a dataset. • To determine the relative frequency of occurrence of an event. • Quantitative data is plotted with data range grouped into bins or intervals. Each column indicates a bin. • The characteristic of a bin is its area and not its height. • *Example:* The representation of time spent by customers in various departments in a departmental store.
	**Pareto Chart**	• To highlight the most important factor among the given set of factors • One of the basic tools in quality control • Bars in descending order represent individual values of the variable, while the exponential curve indicates the cumulative total. • *Example:* The representation of most common sources of consumer complaints related to a product or service given by a company

	**Sankey Chart**	• To represent the flow of variables from one set of values to another. • To draw many-to-many mapping between two domains. • *Example:* The representation of the student flow from Asian countries to US universities for various majors.
	**Box Plot Chart**	• To depict the groups of numerical data through their quartiles. • To represent how values in a dataset are spread out. • Provides a graphical summary of the distribution of a sample. • Whiskers on the two sides of the box represent the variability outside the quartile range and the presence of outliers. • *Example:* The representation of the stocks/shares held by different organizations.
	**Stacked Column Chart**	• Variation of the column chart • To represent part-to-whole comparisons of various sub-segments over time or across various categories. • To determine which sub-total contributes the most to the overall score. • The column heights are compared to determine the relative frequency of occurrence or relative value of the variable. • *Example:* The representation of the types of web-series (thrillers, sci-fi, detective, and so on) watched by people, out of the total viewership, during the lockdown period.
	**Stacked Bar Chart**	• Similar to a Stacked Column Chart and a variation of Bar Chart. • The variables are represented as horizontal bars instead of vertical columns. • *Example:* The representation of the revenue generated by various departments like fashion, accessories, electronics, and so on in various supermarkets in a city.
	**Stacked Area Chart**	• Similar to the Area Chart. • To represent the evolution of the values of various groups. • To determine the significance of each group and the evolution of the values of the numerical variable. • *Example:* The representation of the revenue generated due to sales of various sub-categories of products in a superstore during a financial year.
	Bubble Chart	• Variation of the Scatter Plot Chart. • To represent data with three dimensions – x, y, and value (amplitude) of data. • The size of the bubble (that is, its radius) is proportional to the amplitude of data. • *Example:* The representation of the amount of rainfall in various regions of the country during a given period.

		
	**Table**	• To create a new table out of a given dataset with the selected variables. • To highlight that part of the dataset that is used for analysis.
	**Cross Table**	• To create a new table out of a given dataset with the selection of rows and columns and the value to be displayed. • To highlight the correlation between variables that are not represented in the original dataset. • When there is more than one header row/column then the header row and column are frozen. In case of Single header row/column, header column/row is not frozen.
	**Text Chart**	To create a chart using simple text.
	**HTML Chart**	To render custom charts according to HTML code provided by the user.
	Image	• To add an image to an existing dashboard.

		• Can be browsed directly from the dashboard or using the provided URL.
	**Card**	• To create a card with a single value related to a single variable. • To display any important figure related to the given dataset.
	**Scatter Plot Chart**	• To observe the relationship between two numerical variables. • The location of each dot represents the corresponding value of that data point with respect to the horizontal and vertical axes. • *Example:* The representation of the sale of raincoats in a city according to the amount of rainfall during a year.
	**Waterfall Chart**	• To observe the gradual transition in the value of a variable subjected to an increment or decrement. • Either the first or the last column indicates the total value of that variable. • *Example:* The representation of segregation of the total revenue generated from various home appliances in a shop among the sub-categories of appliances.
	**Sunburst Chart**	• An extension of the Pie Chart. • To visualize hierarchical data structures. • Each concentric ring in the outer direction represents a deeper hierarchy in the distribution of data. • The angle of each segment is proportional to the value of the variable or is divided equally among its parent node. • *Example:* The representation of exports of various machine parts, from a company to various countries.
	**Solid Gauge Chart**	• To represent a variable with a filled arc, where it's color and length change with the value of that variable. • *Example:* The representation of the customer satisfaction score relating to a product/service.
	Map Chart	• To represent data values on the map of the world, a country, or a region.

		• The variation in the color of each portion of the map indicates the values corresponding to the variable selected. • In case the auto-detect mechanism does not work, you can select the required value in *the Region option of the* formatter section. **Note:** • Rubiscape supports data for map charts only from specific regions /countries. Visit http://code.highcharts.com/mapdata/ to know the regions supported by Rubiscape.
	**Combination Chart**	• Combination of the features of a Line Chart and a Bar Chart. • To represent categories of data in the form of lines and bars. • To validate the relationship between two related variables that have different magnitudes and different scales of measurement. • *Example:* The representation of revenue and profit by sale of a commodity in various states in India.
	**Sparkline Chart**	• To represent the variation in one variable with respect to another variable or a category. • Generally used when there are three variables to be represented on the chart. • If used with just two variables (column and value), a simple table like the chart is plotted without a sparkline. • To show data trends. • *Example:* The representation of the variation in average temperature in a city during months of the year.
	**Funnel Chart**	• In general, to represent how a starting 'whole' progressively breaks into individual 'parts.' • In business or sales context, to track how consumers drop out of the flow or process. • *Example:* The representation of the performance of a political party in an election with respect to total seats, prospects, wins, and losses.
	**Filter Widget**	• To filter out data for one dimension or one measure. • To show the minimum and maximum values and the range of values corresponding to a variable. • It helps represent filtering for interval (date) types of data as well. • You can save the existing filter conditions when applied through this widget.

		• *Example:* The representation of profit in the sales of a commodity.
	**Bullet Chart**	• Variation of the Bar Chart and resembles a thermometer. • To show a primary variable, compare it with a target variable, and indicate its performance. • It shows the minimum and maximum values for each dimension that describe the scale. • *Example:* The representation of the annual revenue of a company, compare it to the target revenue, and to indicate whether it is good, satisfactory, or bad.
	**Parameter Widget**	• To represent the data based on parameter values. • To control the defined parameters. • It adds the interactivity to the dashboards.
	**Python**	• It allows to create visualizations using python code. • It provides the GUI to interact with the data and code.
	**Shape**	• To use graphical element in dashboard. • Available shapes are line, arrow, rectangles, circles, triangle, or ellipses.

Notes:

- For huge data, with a large number of unique dimensions, the dimensions more than 50 are clubbed together as a single entity called "Others." For example, a Pie chart is plotted to represent the relative production percentage of 75 varieties of rice grown worldwide. Then, the quantities after the top 50 percentages are categorized as "Others". This functionality applies to charts like Pie Chart, Donut Chart, Sunburst Chart, Solid Gauge Chart, and so on.
- In some cases, a 'Too many values to display' error icon is displayed on the chart when there are too many values.

Your Rating:

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- Column Chart
- Pie Chart
- Area Chart
- Line Chart
- Treemap Chart
- Donut Chart
- Word Cloud Chart
- Bar Chart
- Histogram
- Pareto Chart
- Sankey Chart
- Box Plot Chart
- Stacked Column Chart
- Stacked Bar Chart
- Stacked Area Chart
- Bubble Chart
- Table
- Cross Table
- Text Chart
- HTML Chart
- Image
- Card
- Scatter Plot Chart
- Waterfall Chart
- Sunburst Chart
- Solid Gauge Chart
- Map Chart
- Combination Chart
- Sparkline Chart
- Funnel Chart
- Filter Widget
- Bullet Chart
- Parameter Widget
- Python
- Shape

Using Miscellaneous Features in Rubiscape

As a user, you should know some of the basic activities that you can perform on the Rubiscape home page.

- You can change the view of the items on the home page from card view to list view and vice-versa.
- You can set a dashboard, workbook, workflow, or a dataset as favorite to come back to it later.
- You can also sort the home page items alphabetically or according to recency.
- You can search for your dashboards, workbooks, workflows, datasets, or models directly using the global search icon.

The following sections discuss these activities in detail.

Your Rating:

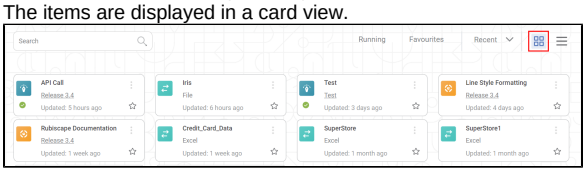
Views

In Rubiscape, you can view the items in the card view or list view in the display pane. The view is just a way of looking at the items from a different perspective. The functions are the same in both views.

Changing to Card View

When you log into Rubiscape, by default, the items are displayed in the Card View. If the items are not displayed in the card view, you can change the view. To change to card view, follow the steps given below.

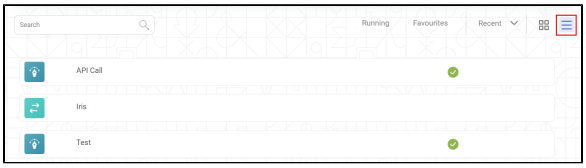
1. On the home page, click **All**. All the items for the selected workspace are displayed.
2. Click the **Card View** icon( ).
   The items are displayed in a card view.



Changing to List View

To change to list view, follow the steps given below.

1. On the home page, click **All**. All the items for the selected workspace are displayed.
2. Click the **List View** icon ( ). The items are displayed in a list view.



Your Rating:

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- Changing to Card View
- Changing to List View

Favourites

Favourites are an easy way to mark and find your items. When added to favourites, they are listed under *Favourites* on the home page. The items that can be added as favourites are,

- Datasets
- Workbooks
- Workflows
- Models
- Dashboards

You can identify a favorite item by the **Star** icon.

	• The item is not added to favorite
	• The item is added to favorite

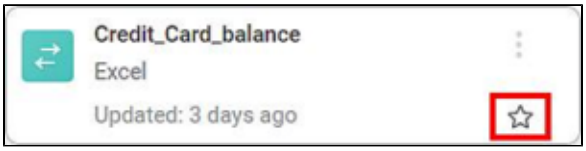
Adding an Item to Favourites

From Card View

To add an item to the favourites list, follow the steps given below.

1. On the home page, click **All**. All the items for the selected workspace are displayed.
2. Locate the item you want to add to your favorite and click the **Star** icon () in the bottom right corner of that card.

Note:	You can also type the name of the item in the *Search* field.

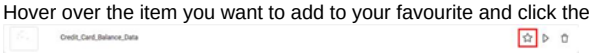


The item is added to favorites.

From List View

To add an item to the favourites list, follow the steps given below.

1. On the home page, click **All**. All the items for the selected workspace are displayed.
2. Hover over the item you want to add to your favourite and click the **Star** icon ().



The item is added to *Favourites*.

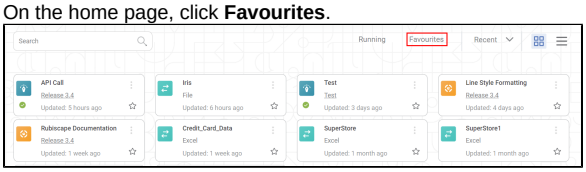
Notes:	• You can also type the name of the item in the *Search* field. • The items with the yellow *Star* icon ( ) are already added to favourites. You can click the icon to remove it from your favourite.

Viewing Favourites Items

To view the items that are added in favorite, follow the steps given below.

1. Open the **Workspace** that includes your favorites. Refer to *Changing Workspace*.

2. On the home page, click **Favourites**.



Recently updated items added as favorites for the selected workspace are displayed.

Your Rating:

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- Adding an Item to Favourites
  - From Card View
  - From List View
- Viewing Favourites Items

Sort

On the Rubiscape home page, you can sort the items in the display pane. The items can be sorted by,

- Recent order
- Alphabetical order

By default, the items are sorted by Recent order.

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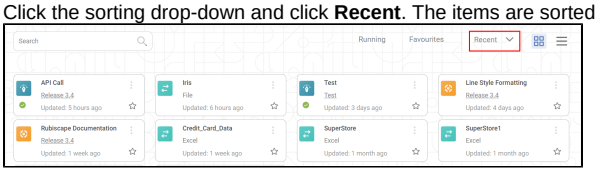
- Sorting by Recent Order
- Sorting by Alphabetical Order

Sorting by Recent Order

When you log into Rubiscape, by default, the items are sorted by recent order. If the items are not sorted by recent order, you can change the sorting order. Sorting by recent order sorts the items in chronological order by displaying the most recently updated items first. To sort by recent order, follow the steps given below.

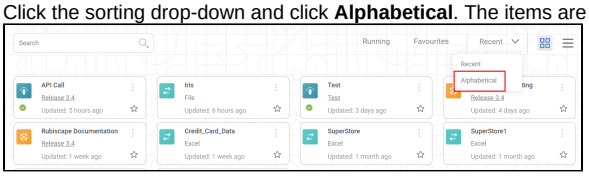
1. On the home page, click **All**. All the items for the selected workspace are displayed.
2. Click the sorting drop-down and click **Recent**. The items are sorted in a recent order.



Sorting by Alphabetical Order

Sorting the items by alphabetical order sorts the items in the same sequence as the alphabetical letters. It displays the items starting with numerical names first, followed by names starting with alphabets in the order from A to Z. To sort by alphabetical order, follow the steps given below.

1. On the home page, click **All**. All the items for the selected workspace are displayed.
2. Click the sorting drop-down and click **Alphabetical**. The items are sorted in alphabetical order.



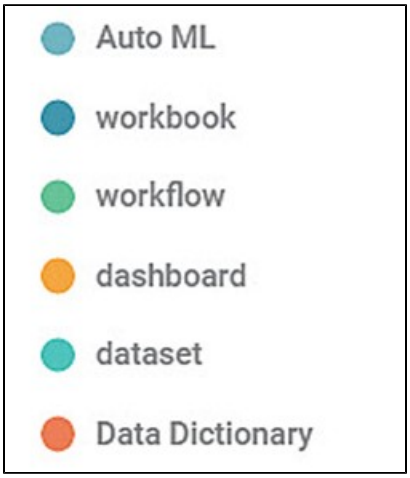
Your Rating:

Global Search

Global Search can be used within your selected workspace to search the items listed below.

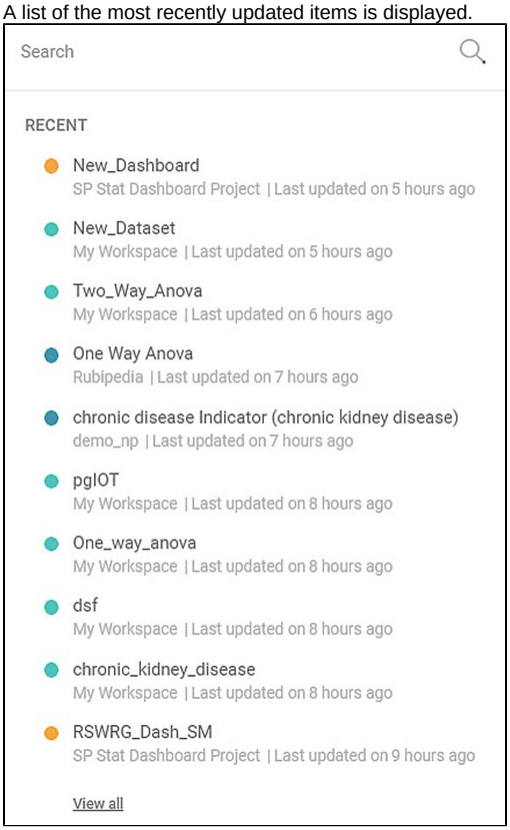
- Workflows
- Workbooks
- Models
- Dashboards
- Datasets

The major advantage of global search is that you can perform a search at any point in time. You need not go to the home page to search for an item. Global search allows you to search while working in a workbook, workflow, or dashboard. It also gives you an overview of the recently updated items. The items displayed in the list are color-coded. The meaning of color codes is shown below.



To perform a global search, follow the steps given below.

1. On the title pane, in the top-right corner, click the **Global Search** icon ( ).
   A list of the most recently updated items is displayed.



2. Click on any items (workbook, workflow, dashboard, model, or dataset) to open them directly.

Notes:

- You can also type the item name in the *Search* field to search any workbook, workflow, dashboard, model, or dataset (partial names can also be used).
- Models are not color-coded.
- To view all the workbooks, workflows, dashboards, and datasets, click *View all*. You are redirected to the Rubiscape home page, and the results are shown in the display pane.

Your Rating:

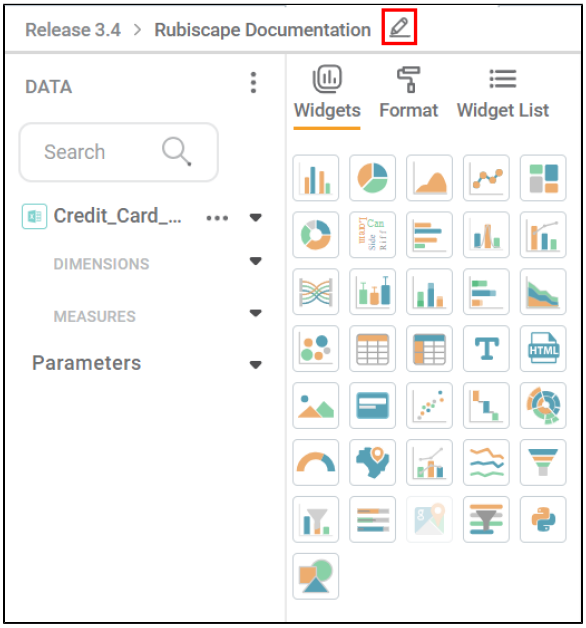
Update Name and Description

Updating the name and description of workbooks, workflows, and dashboards helps to retain the most recent information about them. You can edit this information directly while working on the dashboard.

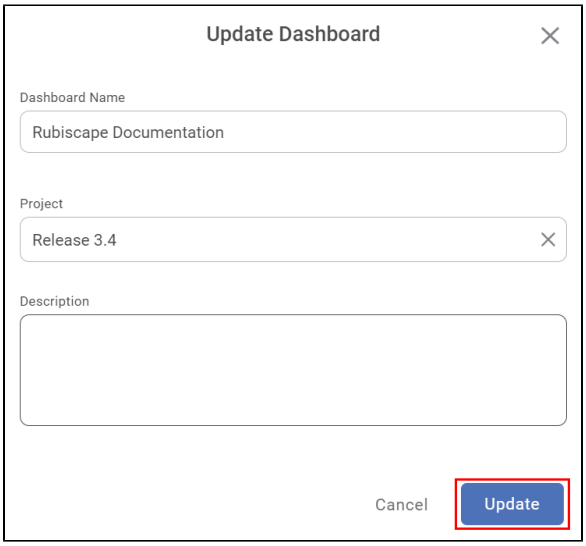
Notes:	• The procedure is the same for updating the workbook, workflow, and dashboard. • You cannot provide a name if an item with the same name is present under the same project. • Before updating information, ensure that the name and description you entered are correct.

Here, we are considering updating the name and description of a workbook. To update the name and description of the workbook, follow the steps below.

1. Open the **Dashboard** that you want to update in Edit mode. Refer to *Editing a Dashboard*. The dashboard canvas is displayed.
2. Click the update icon ( ) next to the dashboard name below the title pane.



3. Change the **Dashboard Name** or **Description** as per your preference.
4. Click **Update**.



The dashboard information is updated.

Your Rating:

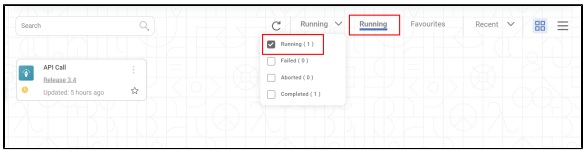
View Workbooks and Workflows in Running Status

In a workspace, there are some workbooks and workflows that are still in running mode. They are easy to locate from the home page using the Running tab. You can also filter the status as Failed, Aborted, and Completed Workbooks and Workflows.
Click the drop-down arrow to filter the workbook and workflows by their status. Click the corresponding check box to filter.

To view the running workbooks and workflows, follow the steps given below.

1. Open the **Workspace** that contains your workbooks and workflows. Refer to *Changing Workspace*.
2. On the home page, click **Running**.

Running workbooks and workflows in the selected workspace is displayed. The number in the bracket indicates the total number of running workbooks and workflows. In the example below, there are two workbooks that are in running status.



Notes:

- To refresh the list of running workbooks and workflows, click the *Refresh* icon ( ).
- You can also filter the status of workbooks and workflows to view in other status as *Aborted*, *Failed*, and *Completed.*
- You can also sort the list by recent or alphabetical order.

Your Rating:

Working with Dashboards

What is a Dashboard

A dashboard is a graphical user interface (GUI), displaying all the key performance indicators at a glance. In short, it is a progress report generated to gauge the performance of a process, business, and so on.
In Rubiscape, a dashboard is an interactive platform in RubiSight where the insights and outcomes of a successfully run model are displayed.

Prerequisites of Creating a Dashboard

Whenever you create a dashboard, it is necessary to ensure the following points beforehand.

- You should have a dataset added in Rubiscape to create graphs and charts of your choice.
- The dataset should be free of errors, missing values and any such anomalies that might create complications while visualizing it on the dashboard.
- If you are building a model and want to create a dashboard based on its analysis, then the required modeling and the subsequent analysis should have been done on the data.
- You should have a basic understanding of the charts, graphs, and tables so that you can use them effectively to create requisite visualization accurately.

Your Rating:

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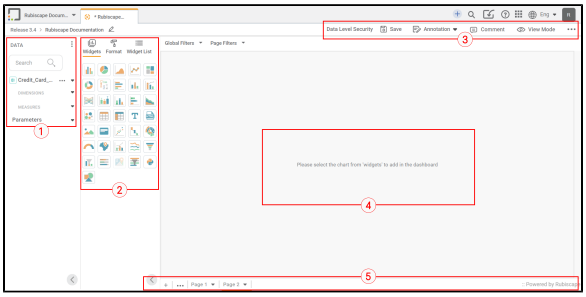
- What is a Dashboard
- Prerequisites of Creating a Dashboard

Understanding RubiSight Home Page

RubiSight home page is the area where you create data visualization using charts and graphs. When you create a new dashboard, the following icons and fields are displayed.



The dashboard screen has four panes, as given below.

1. **Data Pane**: This pane displays the datasets and their dimensions and measures that can be used in the dashboard.
2. **Widgets Pane**: This pane displays the several types of charts, graphs, and tables used in the data visualization dashboard. It also displays the detailed formatting options associated with the widgets.
3. **Function Pane**: This pane displays the various functions that can be performed on the dashboard.
4. **Dashboard Canvas**: This is the work area where you can create widgets of your choice, select the parameters to plot them and format them according to your requirement.
5. **Dashboard Page bar**: This bar lists the pages that are created in a dashboard. You can create more pages, rename them, or move them right or left.

The table below describes the fields and icons on the Workbook Canvas.

Icon/Field		Description
Data pane		It displays the list of datasets, and a list of dimensions and measures present in them.
Widget Pane		It displays all the available widgets, that is, charts, graphs, and tables used for data visualization.
Function pane		
Data Level Security		It helps to restrict access to the data in dashboards.
	Save	It saves your dashboard.
	Annotation	It helps you to number the charts and graphs.
	Comment	It helps you comment on the dashboard.
	View Mode	It displays the dashboard in the 'view only' mode. You can define column-level access on the database, which will show data of only the allowed columns.
	Ellipsis	It displays the following additional functions that are available in the function pane. • Save As • Refresh • Publish • Export in PDF • Export in PPT • Schedule
Dashboard Canvas		It is the area where you can create charts, tables, maps and other widgets for the selected datasets. The selected widget can be plotted using various configuration parameters and modified with various formatting options.
		This bar lists the pages that are created in a dashboard. You can create more pages, rename them, or move them right or left.

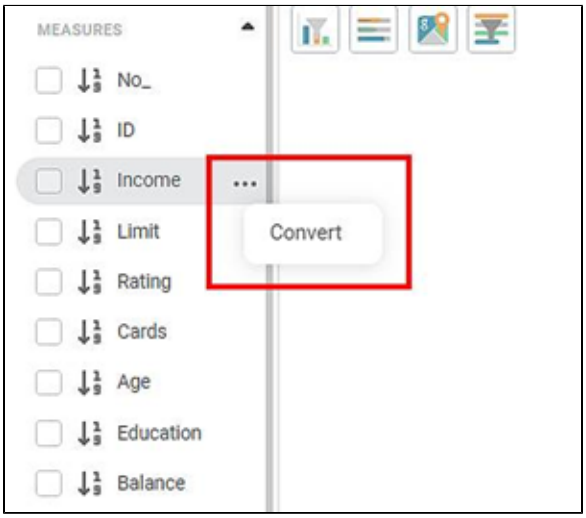
Dashboard Page bar	

Dimensions measure conversions

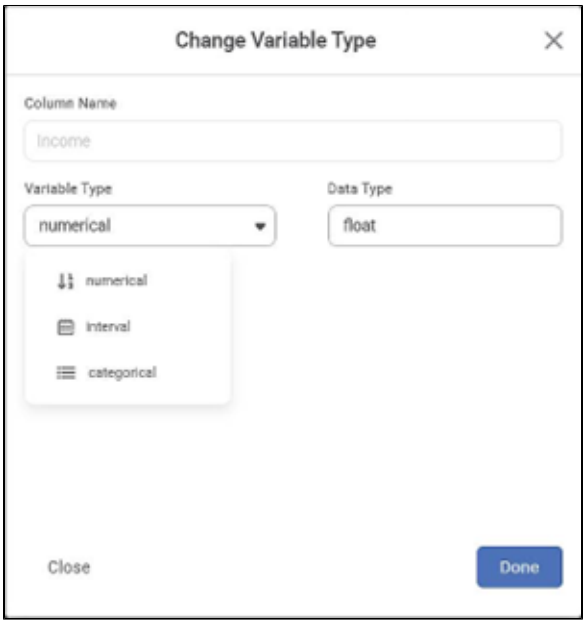
The dashboard contains various panes like Data Pane, Widget Pane, and Function Pane. The Data Pane consists of Dimensions and Measures. In Rubiscape, all dataset numerical variables are considered as measures. Other than numerical variables are displayed as Dimensions. However, many times you face an issue to display independent values. In such a case, you need to convert the measure to dimensions and vice versa. Let's have a look at how to convert it.
Follow the steps mentioned below.

- In the Data pane, click on the three dots, that appear next to the variable.
- Click on the convert button

The figure below displays the **Convert** option



When you click on the Convert option, a popup window opens. You can modify the variable type in this window.



You can convert the variable to the numerical, interval, and categorical types. The variable contains characters other than numbers. You convert this variable to numerical. In such a scenario, you will see only the Count aggregate function. Once you convert the variable type, the variable is displayed in the Dimensions or Categorical section.

Notes:	• Date hierarchies are applicable in the Dimensions section only. If you convert it to a Numerical variable type then Date hierarchies are not displayed in the measures section. • However, you can revert the variable to its original type by clicking on the Reset option. The Reset option is visible when you hover over the three dots next to the converted variable.

Example of a Measures to Dimension conversion

Consider Sales Dataset with measures like Postal Code, Sales, Quantity, and Discount. You want to use a table widget to display Postal code-wise sales.
A postal Code is a numeric field. It appears in the measures section. When you select the Postal code as a measure, you have to use aggregate functions like Sum, Count, and Min. You are not able to display the data in table format.
The following figure displays the table data when Postal Code is in measure.

Sales	Postal Code
2297200.86	551572652

The following figure displays the table data when the Postal Code variable is converted to a Categorical variable.

Sales by Postal Code

Sales	Postal Code
78697.18	10024
77357.89	10035
54761.50	10009
52667.47	94122
45551.60	10011
41838.01	98105
41160.91	98115
39390.29	19134
39133.33	32216
37961.01	90049
37419.77	90045
36541.83	98103
34991.32	94110
29157.85	90036
26292.52	19120
25676.27	92037
25208.04	90008
25010.31	94109
23684.26	90004
23018.73	48205

Your Rating:

Table of Content

- Dimensions measure conversions
  - Example of a Measures to Dimension conversion

Performing Dashboard Tasks

Once the dashboard is created, you can perform various tasks as listed below.

- Create Dashboard
- Edit Dashboard
- View Dashboard
- Search Dashboard
- Saving a Dashboard
- Refresh Dashboard
- Publish Dashboard
- Export Dashboard
- Delete Dashboard
- Replace Dataset

The following sections explain these tasks in detail.

Your Rating:

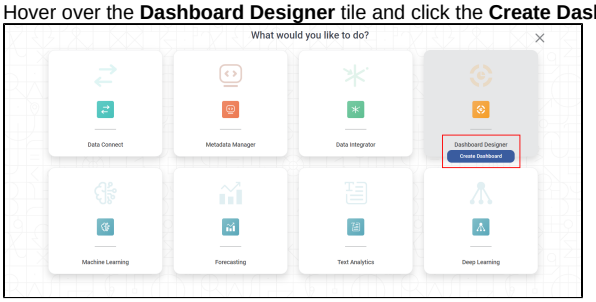
Creating a Dashboard

You can create a new dashboard from scratch or create a dashboard using an existing dashboard.

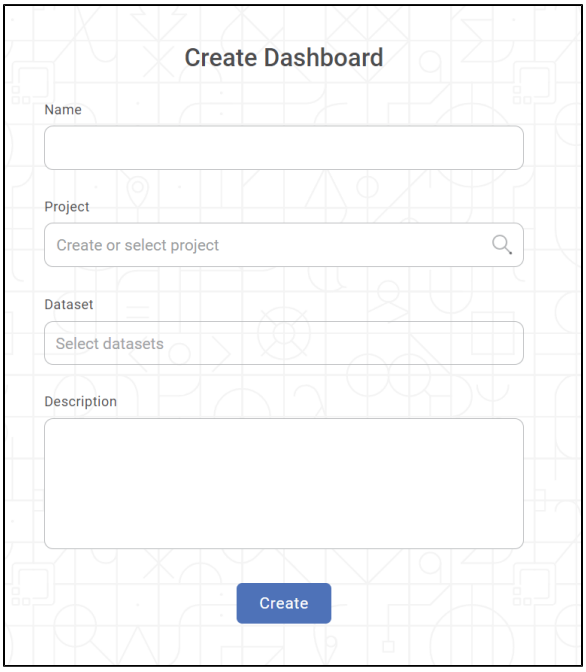
Creating a New Dashboard

To create a new dashboard, follow the steps given below.

1. On the home page, click the **Create** icon ( ).
2. Hover over the **Dashboard Designer** tile and click the **Create Dashboard** button.



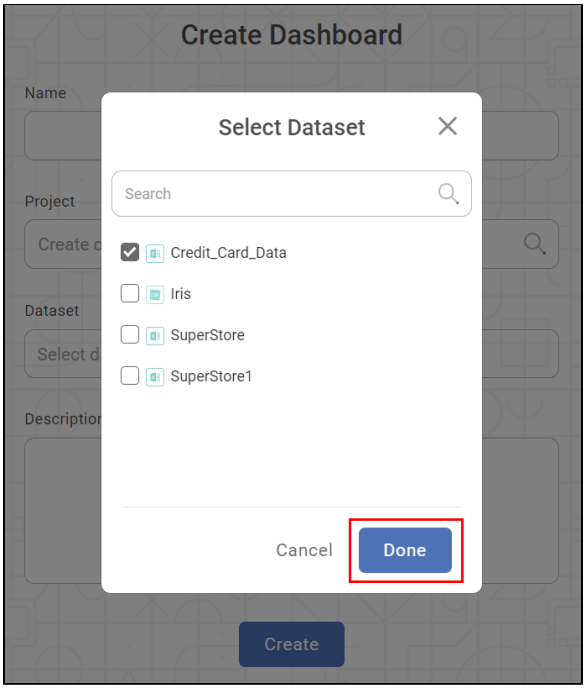
The *Create Dashboard* page is displayed.



3. Select the **Create new** radio button.
4. Enter the **Name** for your dashboard.
5. Enter the name in the **Project** field to create a new project.

Notes:	• The dashboard is created under the entered project name. • You can also type the name of the existing project in the *Project* field to select the project. • The project name is mandatory.

6. Click **Select Dataset** in the **Dataset** field. The *Select Dataset* window is displayed.



Notes:	• The datasets are listed in the *Ascending Order* with respect to numbers and alphabets in the following sequence.
	  • First, the datasets with names beginning with numbers (0 to 9)
	  • Next, the datasets with names containing a combination of numbers (0 to 9) and alphabets (A to Z) with numbers displayed first.
	  • Finally, the datasets with names beginning with alphabets (A to Z)
	• You can use the Search box at the top of the dataset list to search the desired dataset.
	• You can select multiple datasets.
	• Locate the dataset you want to add and select its corresponding check box.

7. Locate the dataset you want to add and select its corresponding check box
8. Click **Done**. The Select Dataset window is closed, and you are redirected to the Create Dashboard window.
9. Enter **Description** for your dashboard.
10. Review all fields and click **Create**. The dashboard is created, and the dashboard canvas is displayed.

Your Rating:

Table of Content

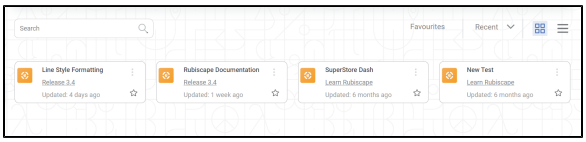
- Creating a New Dashboard

Editing a Dashboard

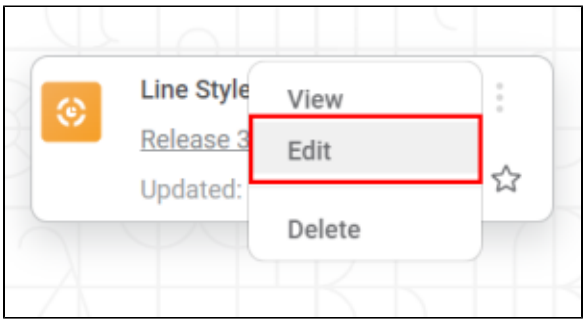
You can edit a dashboard to access and view it or to add more widgets to the dashboard. To edit a dashboard, follow the steps given below.

1. Open the **Workspace** that includes your dashboard. Refer to *Changing Workspace*.
2. On the home page, click **Dashboards**. Recent Dashboards for the selected workspace are displayed.

Note :	You can sort the dashboards by *Recent* or *Alphabetical* order.



3. Hover over the dashboard you want to edit, click the vertical ellipsis ( ), and then click **Edit**.



The dashboard opens in a new tab. You can view all the charts, graphs, and tables created in the dashboard.

Your Rating:

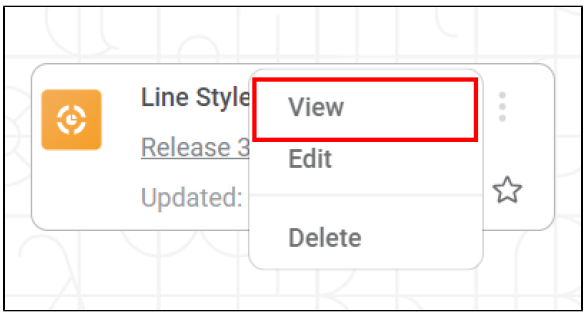
Viewing a Dashboard

Viewing helps you open the dashboard and see all the charts, graphs, and tables in the view mode.

Notes:	Make sure you are in the correct *Workspace*, which includes the *Dashboard* that you want to view.

To view a dashboard, follow the steps given below.

1. Open the **Workspace** that includes your dashboard. Refer to *Changing Workspace*.
2. On the home page, click **Dashboards**. Recent Dashboards for the selected workspace are displayed.
3. Hover over the dashboard you want to view, click the vertical ellipsis ( ), and then click **View**. The dashboard is displayed in view mode.



Notes:	• You can see the charts, graphs, and tables that you have created in the view mode. However, you cannot edit them. • The Data Pane and the Widget Pane are NOT visible. • Click the widget and then click the ellipsis to select from the options like *Sort Ascending, Sort Descending, Sort by, Show in "At a glance"*, *Export Chart In PDF*, and *Export Data In CSV*. • You can use options like Annotations, Comments, Refresh, Edit Mode, Publish, and Export from the function pane. • If you want to edit the dashboard, click the Edit Mode icon (Edit Mode) in the top-right corner.

Your Rating:

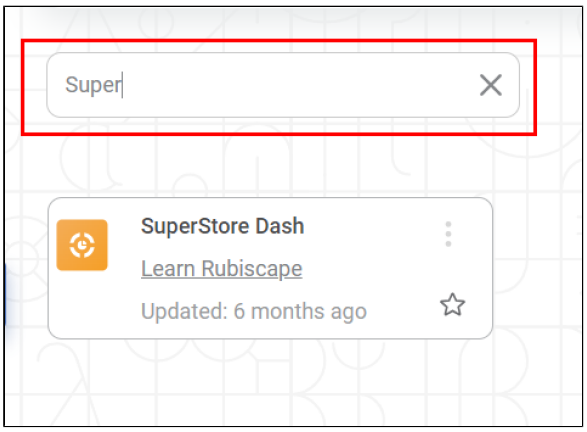
Searching a Dashboard

Searching helps you to search a dashboard by a specific name. There can be a long list of dashboards in some workspaces. It is not convenient to manually search a single dashboard from a long list.

Note:	Make sure you are in the correct *Workspace*, which includes the *Dashboard* that you want to search.

To search a dashboard, follow the steps given below.

1. Open the **Workspace** that includes your dashboard. Refer to *Changing Workspace*.
2. On the home page, click **Dashboards**. Recent Dashboards for the selected workspace are displayed.
3. Type the dashboard name in the **Search** field. As you start typing, the list of dashboard names matching the search string is populated, as shown in the figure below.



Note:	Hover over a dashboard and click the ellipsis to View, *Edit* or *Delete* the dashboard.

Your Rating:

Saving a Dashboard

You can save a dashboard to access and view it later. There are two modes in which you can save a dashboard. These are,

1. Save (to save a dashboard with its current credentials) - To save a dashboard, open the dashboard in

   Edit Mode and click the save icon ( ) in the function pane.
2. Save As (to save a dashboard with a new name and description)

Table of Contents

- Using Save As option
- Download/Export Algorithm Results

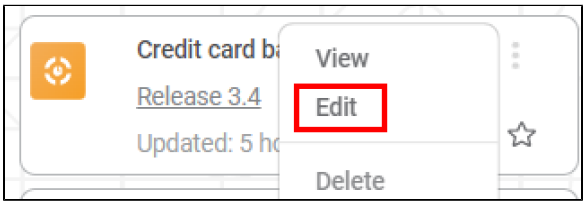
Using Save As option

To save a dashboard using the *Save As* option, follow the steps given below.

1. Open the **Workspace** that includes your dashboard. Refer to *Changing Workspace*.
2. On the home page, click **Dashboards**. Recent Dashboards for the selected workspace are displayed.

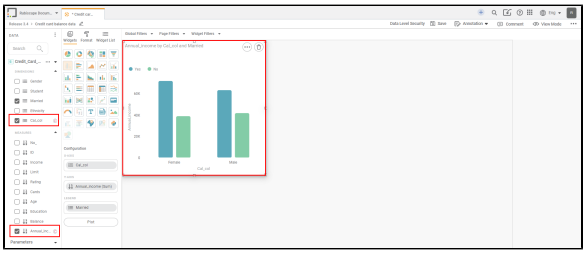
Note:	You can sort the dashboards by *Recent* or *Alphabetical*.

3. Hover over the dashboard you want to save as a new dashboard, click the vertical ellipsis ( ), and then click **Edit**.

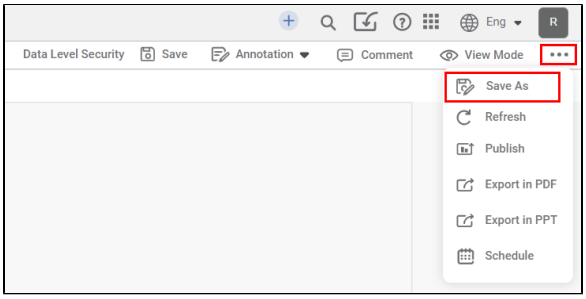


4. In the dashboard, add a **Calculated Column.** Refer to *Adding Calculated Column to Dataset*.

   The dashboard opens in a new tab. You can view all the charts, graphs, and tables created in the dashboard. The figure below shows the *Credit Card Balance Analysis Dashboard* with a *Colu mn Chart* plotted on it. A calculated column Cal_*Col* and *Annual_Income* is created in it.

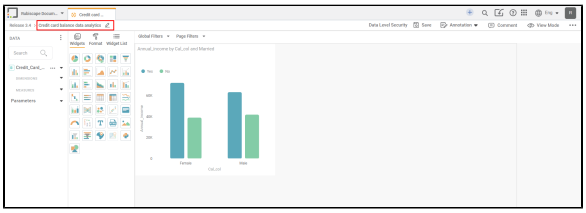


5. In the function pane, click the horizontal ellipsis ( ) and click **Save As** from the dropdown.



A *Save As Dashboard* window is displayed.

6. Enter a different **Name** and **Description** for the dashboard and click **Save**. The dashboard is saved with the new name and description, along with the widget(s), dataset, Calculated Column.



Notes:

- The new dashboard is also separately displayed on the Home Page.
- When you save a dashboard using the *Save As* option, the newly added parameters and calculated columns are also saved with it.
- You can use these added parameters and calculated columns in the new dashboard for further analysis and visualization.
- You can save dashboards in the same workspace either in
  - same project
  - different project
  - a newly created project
- While saving dashboards, you can save them
  - In the same project with a different name
  - In a different project with the same/different name
  - In a new project (you can create a new project while using the save as option) while saving them
- All properties/characteristics/data in the dashboards are also saved in the new entity.
- In the case of a dashboard, all the pages in the dashboard and comments added to the dashboard (if any) are also carried forward in the newly saved location.

Download/Export Algorithm Results

When you explore the results of functionality or an algorithm, you see *Data*, *Results*, and *Chart* tabs. For all functionalities and algorithms that generate the Result page, you can download the Result page as pdf.

For this, click the Download icon ( ) near the top right corner of the *Result* page. The Result page can be downloaded to your machine/system in a folder of your choice.

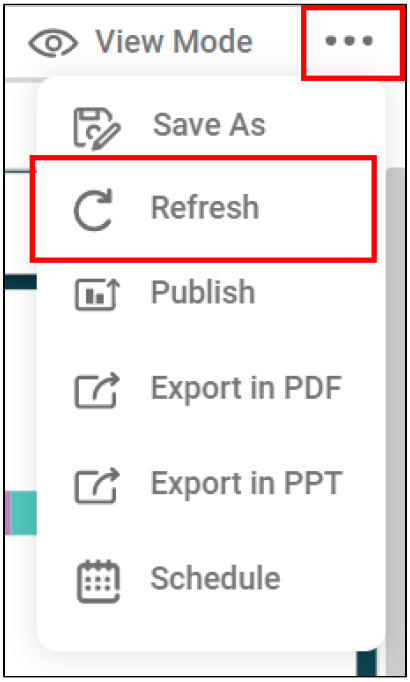
Notes:

- The *Download as PDF* option is not available for those functionalities that do not generate the Results page.
- If *Train Test* split is applied to the data, or there are variables in the *Event of Interest* drop-down, the Download as PDF option downloads the data for the actual selection at the time of downloading.
- If you change the selections, a new PDF file will be created and downloaded.

Refreshing a Dashboard

Refreshing a dashboard helps you fetch the latest data and display the most current views. To refresh a dashboard, follow the steps given below.

1. Open the **Workspace** that includes your dashboard. Refer to *Changing Workspace*.
2. On the home page, click **Dashboards**. Recent Dashboards for the selected workspace are displayed.
3. Hover over the dashboard and click **Edit**. The dashboard is displayed in edit mode.
4. On the function pane, in the top-right corner, click the ellipsis ( ).
5. From the drop-down list, click **Refresh**.



A confirmation message is displayed, and the dashboard is refreshed.

Your Rating:

Publishing a Dashboard

You can publish a Dashboard after it is created. Publishing a Dashboard generates a public link for the Dashboard, which can then be shared with the business users.
Publishing a Dashboard facilitates business users to

- Receive the URL and open the Dashboard independently in a new window.
- View all pages within the Dashboard without any login credentials.
- Apply interactivity filter on the Dashboard to visualize data analysis results dynamically.

To publish a Dashboard, follow the steps given below.

1. Open the **Workspace** that includes your Dashboard. Refer to *Changing Workspace*.
2. On the home page, click **Dashboards**. Recent Dashboards for the selected Workspace are displayed.
3. Hover over the Dashboard that you want to publish and click **Edit**. The Dashboard is displayed in edit mode.
4. On the Function Pane, click the **ellipsis** (•••) in the top-right corner.
5. From the drop-down list, click **Publish**.

Publish Dashboard dialog box is displayed.

6. Enter the number of days in the **Validity of Dashboard (Enter number of days):** field

Notes:	• A validation option is provided for validating the Dashboard. This is the validity of the public link generated for the Dashboard. • Users can enter the validity (*number of days*) up to *30 days*. • If the number entered by the user is greater than 30, then the user will not be able to generate the link.

7. Click **Generate Link**.

A link is generated in the **Public Link** field, and the Dashboard is published.

Notes:	• The option for Publishing a Dashboard is provided in *Edit Mode* only. • You can copy the Dashboard link using the **copy** icon ( ) to share the Dashboard with business users. • The business users can view the Dashboard using the link shared with them until it is valid. • The link can also be used while creating a new Dashboard. Refer to *Creating Dashboard from Existing Dashboard*. • User login is not required to view or create a Dashboard using the public link. Anyone who has the link can view or create the Dashboard. • The business users can also use the *Interactivity* filter to visualize the Dashboard results dynamically. Refer to *Interactivity Filter*. • All the pages in the Dashboard are published on publishing a Dashboard. • After the link is generated, you can click *Open in a new window* to open the Dashboard in a new tab in the browser.

Your Rating:

Exporting a Dashboard

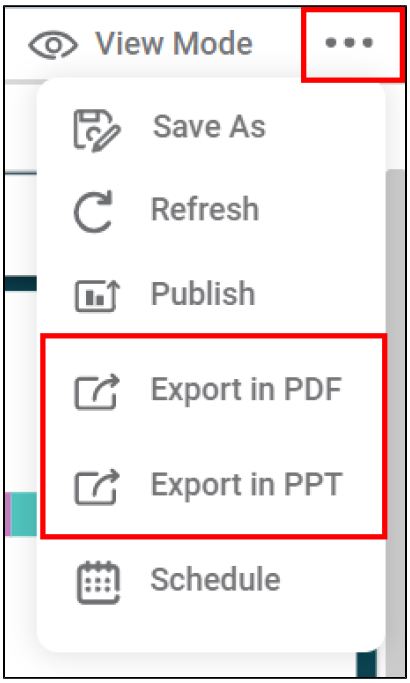
Exporting a dashboard helps you to store/save the dashboard on the system. You can then share or view the dashboard in PDF and PPT format. When you export a dashboard, all the pages present in the dashboard are exported.

To export a dashboard, follow the steps given below.

1. Open the **Workspace** that includes your dashboard. Refer to *Changing Workspace*.
2. On the home page, click **Dashboards**.
   Recent Dashboards for the selected workspace are displayed.
3. Hover over the dashboard and click **View**.
   The dashboard is displayed in view mode.

Note:	• Exporting a dashboard is not limited to View Mode only. You can Export a dashboard from View mode as well as Edit Mode.

4. On the function pane, in the top-right corner, click the ellipsis ( ).
5. From the drop-down list, click **Export in PDF** or **Export in PPT**.



The dashboard is downloaded as a PDF or a PPT file, and a confirmation message is displayed.

Notes:	• Some browsers will ask you to select the location where you want to save your dashboard. Select the destination folder, and then click *Save*. • The PDF contains the same number of pages as the exported dashboard. • The PPT contains the same number of slides as the exported dashboard. • Once a user clicks Export, the status changes to ***Exporting***. The user CAN NOT click or change the icon until the dashboard is exported. After the download is complete, the icon returns to **Export** status automatically. • When exporting a dashboard with Data Level Security, the data shown will be as per the access granted to the dashboard.

Your Rating:

Deleting a Dashboard

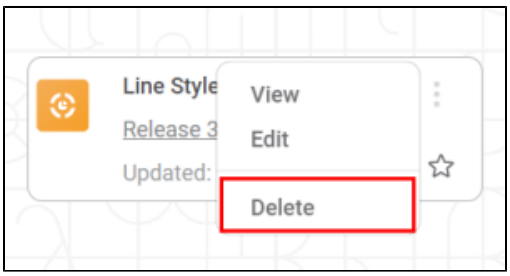
You are deleting the dashboard results in the deletion of all the charts, graphs, and tables in it. You can delete a dashboard if it has already been saved or is not required.

Notes:	• Make sure you are in the correct *Workspace*, including the dashboard you want to delete. • You can delete a dashboard only if the Administrator grants permission to delete it.

Warning:	• This action cannot be undone. • Deleting the dashboard results in the deletion of all the charts, graphs, tables, and pages present in it.

To delete a dashboard, follow the steps given below.

1. Open the **Workspace** that includes your dashboard. Refer to *Changing Workspace*.
2. On the home page, click **Dashboards**. Recent Dashboards for the selected workspace are displayed.
3. Hover over the dashboard you want to delete, click the vertical ellipsis ( ), and then click **Delete**.



A message to confirm your action is displayed.

4. Click **Yes, Delete.** The dashboard is deleted, and a confirmation message is displayed.

Your Rating:

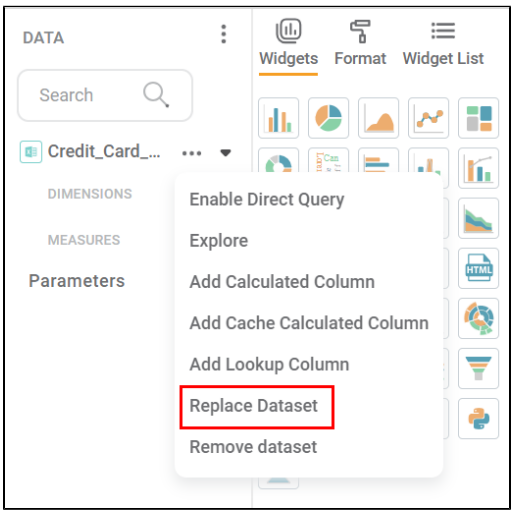
Replace a Datasets

You can replace the dataset in a built dashboard in RubiSight.
The following conditions must be met to replace the dataset in the dashboard with a new dataset:

- Columns must have the same number.
- Columns must have the same names.
- Columns with the same datatype

To replace the datasets, follow the steps given below.

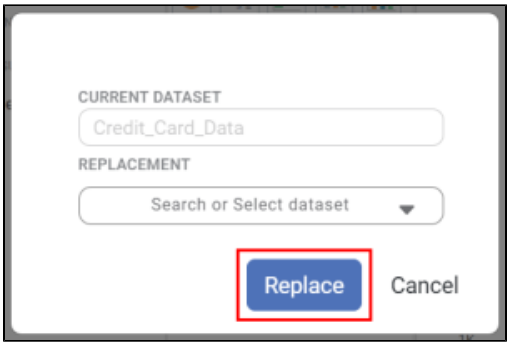
1. Open the **Dashboard** in edit mode. Refer to *Viewing a Dashboard.*
2. The Dashboard is displayed.
3. In the Data pane, click the ellipsis corresponding to the dataset, and then click **Replace Dataset** from the listed options.



The **Replace Dataset** window is displayed.

4. The current Dataset name is visible in *CURRENT DATASET.*
Click the drop-down arrow in *REPLACEMENT.*

In the Search dialogue box, enter the name of the new dataset and select the dataset.



5. Click **Replace**.
The dataset is replaced, and the dashboard is updated with the new dataset.

Notes:	• In case of different numbers of columns ***"Variable types are different. Replace dataset not allowed!"*** error message is displayed. • In case of different column names ***"Column names are different. Replace dataset not allowed!"*** error message is displayed. • In case of different numbers of columns ***"Columns are different. Replace dataset not allowed!"*** error message is displayed.

Your Rating:

Accessing Dashboard Pages with Distinct URLs

When a Dashboard is published, all its pages are published by default in the same sequence they were created. When the Dashboard is published, you can create a Dashboard Link, which can be shared with business users. When the business users click the link, the first page of the Dashboard opens by default,
Sometimes, business users need to visit a particular page from the Dashboard. RubiSight provides a direct access feature to that page by creating its distinct Uniform Resource Locator (URL).
This feature helps to

- view the desired page directly without navigating through the Dashboard pages.
- reduce the time to navigate through the Dashboard

Opening a Dashboard in View Mode

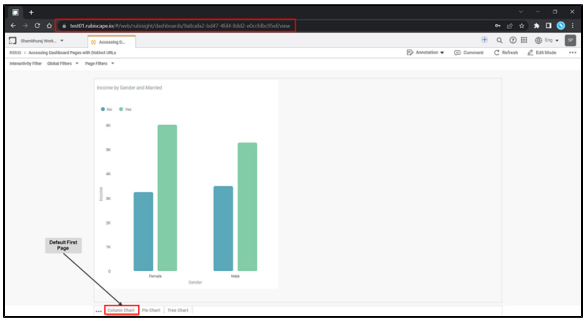
To create a distinct URL for one of the Dashboard pages, we have to open the Dashboard in the View Mode.
For this, follow the steps given below.

1. Locate the Dashboard that contains the page for which you want to create the URL.
2. Open the Dashboard in **View Mode**. Refer to *Viewing a Dashboard*.

Notes :	Currently, the creation of a page URL is restricted to View Mode only.

The Dashboard opens in the *View Mode*. In this mode,

- The first page is displayed by default.
- The Dashboard URL is displayed in the address bar.



In the above figure,

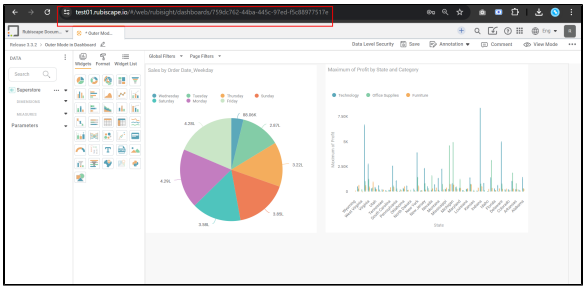
- *Column Chart, Pie Chart*, and *Tree Chart* are the Dashboard's first, second, and third pages.
- By default, the *Column Chart* page is displayed.

Opening a Dashboard in Outer Mode

Outer mode is a feature in Rubiscape that helps business users view the dashboard excluding dashboard headers and page navigation. Using "***louter***" at the end of the page URL, business users can access the particular page in Outer mode. In Outer mode, the user can access the Interactivity Filter, Global Filters, Page Filters, and Widget Filters.

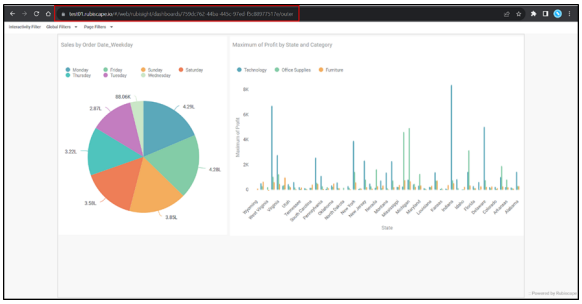
To open the dashboards in outer mode, follow the steps below.

1. Click the address bar to edit the dashboard URL.



2. Type "**/outer**" at the end of the existing dashboard URL.
   URL: **https://test01.rubiscape.io/#/web/rubisight/dashboards/759dc762-44ba-445c-97ed-f5c88977517e/outer**

3. Click **Enter**. The dashboard is opened in outer mode.



Notes	• User needs to log-in to the application to access the Outer mode URL. • User can also create page-wise URLs in outer mode. Refer to *Creating Page-wise URL*. • User can apply filter using URL in outer mode. Refer to *Providing Global Filter with Page URL*. • To open the dashboard with the newly created URL, Refer to the *Accessing Dashboard Pages with Distinct URLs*.

Creating Page-wise URL

Now, you can change the URL to view the *Tree Chart* page directly when the Dashboard opens.
For this, follow the steps given below.

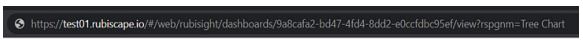
1. Click in the **Address Bar** to edit the Dashboard URL.
2. Type the expression **?rspgnm=Tree Chart** at the end of the existing Dashboard URL.

Notes	• The expression contains four elements, ?, rspgnm, =, and Page name. • The expression should contain the exact name of the page that you want to view

3. Click **Enter**. The newly created URL for the *Tree Chart* page is given below.

   URL Address:

   https://test01.rubiscape.io/#/web/rubisight/dashboards/9a8cafa2-bd47-4fd4-8dd2-e0ccfdbc95ef/view?rspgnm=Tree%20Chart



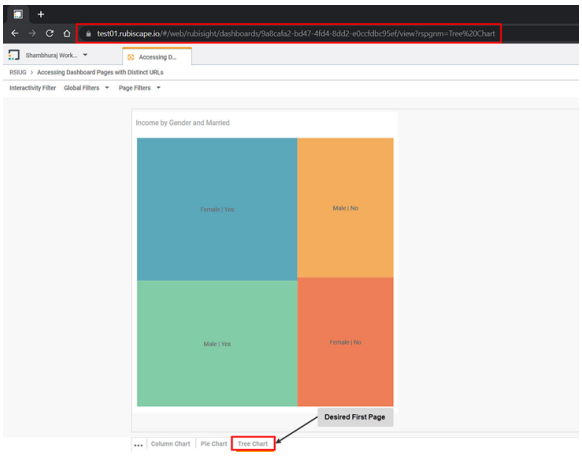
Notes:	• In the expression above, *rspgnm* stands for *rubisight page name*. • Please make sure there are no spaces between the elements. • If the page name entered is incorrect, the new URL will open the default first page of the Dashboard.

Opening Dashboard with the new URL Address

To verify if the URL opens the desired page first, follow the steps given below.

1. Click the **Address Bar**.

2. Copy the newly created **URL**.
3. Open a new window in your browser.
4. Paste the URL address in the *address bar* of the browser.
5. Press **Enter**. The Dashboard is displayed with the desired page opening by default. In the example, the *Tree Chart* page is opened directly.



Providing Global Filter with Page URL

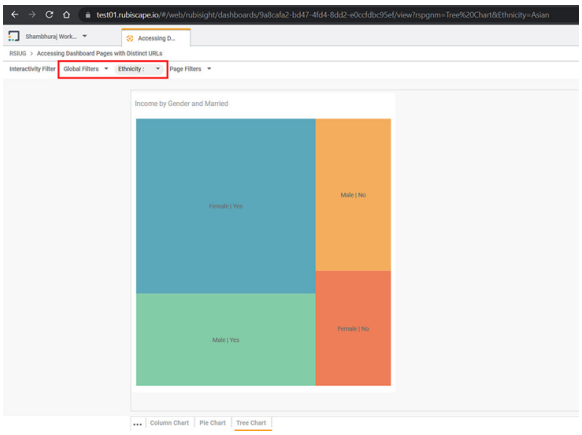
When you create a page-wise URL, you can also provide a Global Filter. It helps apply the selected filter to all the widgets plotted on the page.
To provide a Global Filter along with a page-wise URL, follow the steps given below.

1. Create a page-wise URL for the desired page. Refer to *Creating Page-wise URL Address*.
2. Use the link to open the Dashboard. Refer to *Opening Dashboard with the new URL Address*.
3. To apply Global Filter, click the *address bar*.
4. Type the expression **&Ethnicity=Asian** at the end of the current URL address. A Global Filter *Ethnicity* = *Asian* is applied to the *Tree Chart*.
5. Press **Enter**.
   The newly created URL for the Tree *Chart* page is given below.

   URL address:
   https://test01.rubiscape.io/#/web/rubisight/dashboards/9a8cafa2-bd47-4fd4-8dd2-e0ccfdbc95ef/view?rspgnm=Tree%20Chart&Ethnicity=Asian

6. Copy the newly created **URL Address**.
7. Open a new window in your browser.
8. Paste the URL in the **Address Bar** of the window.
9. Click **Enter**.

   The Dashboard opens with the *Tree Chart* page containing columns only for the *Ethnicity filter* = *Asian*.



Notes :

- Although all three filters (*Interactivity*, *Global*, and *Page*) are visible on the page, you can apply only the Global Filter to the page from the URL described above.
- When applying a filter, ensure you have entered the URL's correct name of the dimension.

- You can apply more than one *Global Filter* simultaneously. It is beneficial to have several widgets plotted on a page using different dimensions and measures.
- You cannot add filters to the URL link of a Published Dashboard.
- When you publish a Dashboard, only the *Interactivity Filter* is enabled.

Your Rating:

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- Opening a Dashboard in View Mode
- Opening a Dashboard in Outer Mode
- Creating Page-wise URL
- Opening Dashboard with the new URL Address
- Providing Global Filter with Page URL

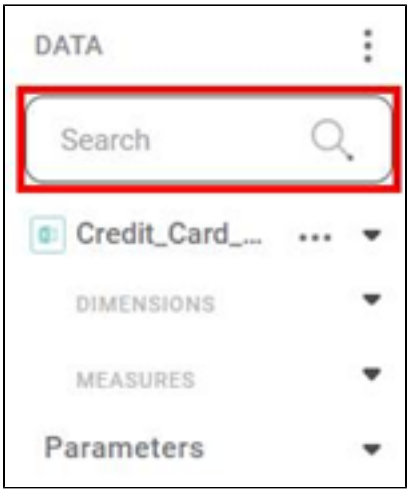
Search Option in Data Pane

When creating dashboards, we add datasets to them to plot various widgets. To plot widgets, multiple datasets can be used on the same dashboard page, or the same dataset can be used on multiple dashboard pages. All these datasets are parked in the data pane on the extreme left of a dashboard page. Now, each dataset may contain many columns. Thus, if you want to use a particular column in a dataset to plot a widget but do not know where it is, you can use the search field in the data pane.

Notes

- The Search Option is used to search columns from the following entities related to a Dataset.
  - Dimensions
  - Measures
  - Details (*for Textual Variables*)
  - Hierarchies
- The Search Option is not applicable for searching a Parameter.

The search field helps you easily locate the column. It also helps you locate columns with similar names present in multiple datasets.

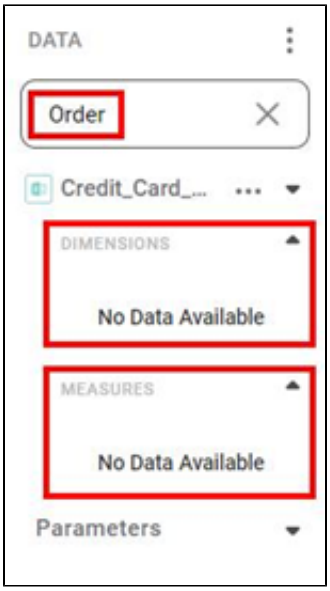


You can search a column using textual string. It can be the complete name, a group of alphabets in a logical sequence, or simply a single alphabet. Consider an example of three datasets in the data pane, each dataset containing multiple columns under dimensions and measures. To search for a particular column,

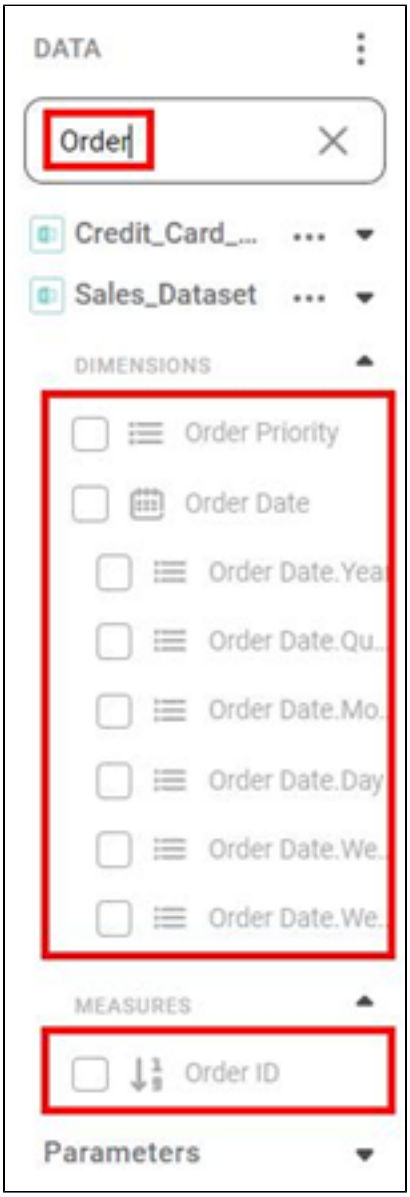
1. Type a text string like a name, a group of alphabets, or a single alphabet in the search field. For example, we type 'order'.
2. Navigate to each dataset, expand the dataset, and expand the dimensions and measures drop-downs. All columns with the string 'order' are displayed. If the string is absent in any of the datasets, *'No Data Available*' is displayed.

Results:

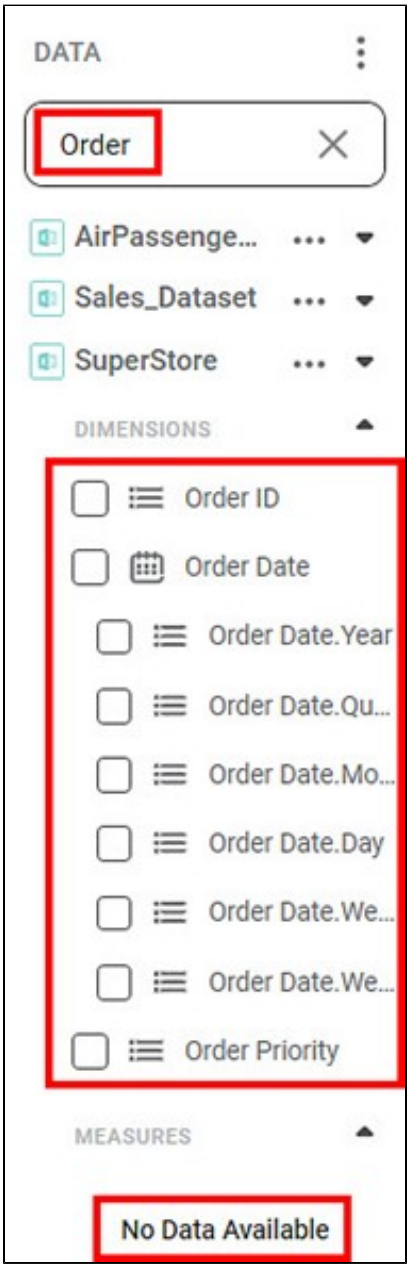
- The first dataset displays *No Data Available* since none of the column names in dimensions or measures match the search string.



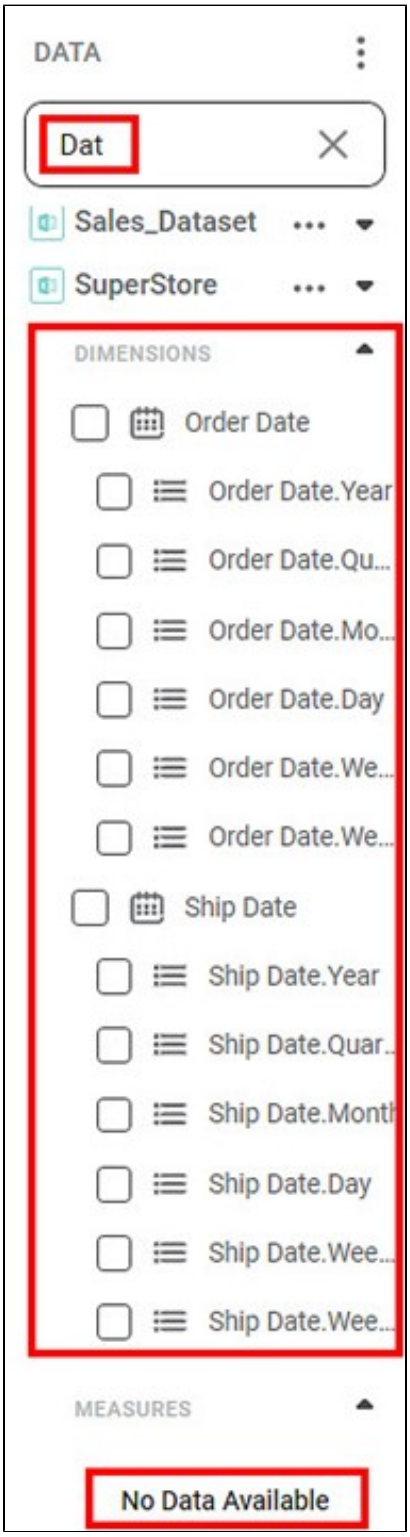
- In the second dataset, columns in dimensions and measures matches the search string and is displayed. Also, you can see that the search is not case-sensitive.



- In the third dataset, three columns in dimensions match the search string and are displayed. None of the columns in measures match the string.



- In place of a complete name, even if you type a group of alphabets, you can search for column names with identical strings. For example, the image below shows the search result for the string '*Dat*'.



Your Rating:

Using Data Level Security

RubiSight provides a Data Level Security feature, which helps to restrict access to the data in dashboards.
You can define column-level access on the database, which will show data of only the allowed columns.
To use Data level security, you first need to create a dataset (access master) that stores the information about users and groups and the corresponding data fields they are allowed to access.
The steps to use data level security are listed below.

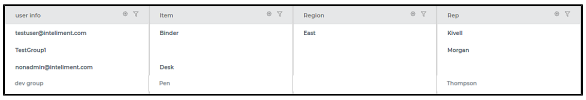
1. Create a dashboard with required widgets; refer to *Creating a Dashboard*.
2. Create access master dataset; refer to *Creating Access Master Dataset*.
3. Enable data-level security; refer to *Enabling Data Level Security*.

Creating Access Master Dataset

To create an access master dataset, follow the steps given below.

1. Create a CSV or Excel file of the format: user info and names of columns from the datasets used in the dashboard.
2. In each individual dataset column names, specify the names of data values to which access is to be granted to the user.
3. Create a dataset in Rubiscape using this file. Refer to *Adding a Dataset*.

For example, consider you have created a dashboard with two datasets – sales by region and sales by category.
An example of the access master dataset is shown below.



Notes:

- When no value is specified for any column, it indicates that the user has access to all values for that column.
- In the above example, the user *testuser* has access to *Binder* Item, *East* Region and *Kiveli* Rep. Similarly, *TestGroup1* has access to all Items, all Regions, and Morgan Rep.

Enabling Data Level Security

To enable data-level security, follow the steps given below.

1. Locate the dashboard to which you want to apply data-level security. Refer to *Searching a Dashboard*.
2. Open the **Dashboard** in edit mode. Refer to *Editing a Dashboard*.
   The Dashboard is displayed.
3. On the function pane, in the top right corner, click **Data Level Security**.
   Data Level Security page is displayed.
4. Select the dataset from **Dataset To configure** drop-down. Here, select the name of the dataset created in *Creating Access Master Dataset*.
   The columns in the selected dataset are populated.
5. Select *Entity Column* (the one that has user names or group names) from the drop-down.
6. Select **ENABLE DATA LEVEL SECURITY** checkbox.
7. Click **Done**.

A confirmation message is displayed, and Data level security is applied. The dashboard widgets are refreshed to show only the data to which the logged-in user has access.

Disabling Data Level Security

To disable data-level security, follow the steps given below.

1. Locate the dashboard to which you want to apply data-level security. Refer to *Searching a Dashboard*.
2. Open the **Dashboard** in edit mode. Refer to *Editing a Dashboard*.
   The Dashboard is displayed.
3. On the function pane, in the top right corner, click **Data Level Security**.
   Data Level Security page is displayed.
4. Clear **ENABLE DATA LEVEL SECURITY** checkbox.
5. Click **Done**.

A confirmation message is displayed, and Data level security is disabled. The dashboard widgets are refreshed to show only the data to which the logged-in user has access.

Your Rating:

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- Creating Access Master Dataset
- Enabling Data Level Security
- Disabling Data Level Security

Refreshing Dashboard using Scheduled Workflow

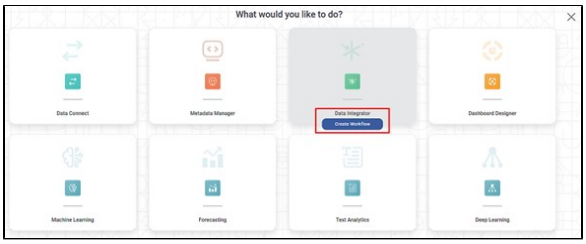
The dashboards that you create are static, meaning the dashboard views do not change if the data they represent is changed. For this, you can use the refresh function provided by RubiSight. Refer to *Refreshing a Dashboard*.
However, there can be instances that data keeps changing often, and the dashboards that are plotted using that data need to be auto-refreshed without any user intervention.

You can achieve this auto-refreshing of the dashboard by scheduling workflows.
The auto-refresh of dashboards involves two main steps:

1. Create Workflow for Cache Refresh
2. Schedule the Workflow to run at a specified time interval

To enable auto-refreshing of the dashboard by scheduling workflow, follow the steps given below.

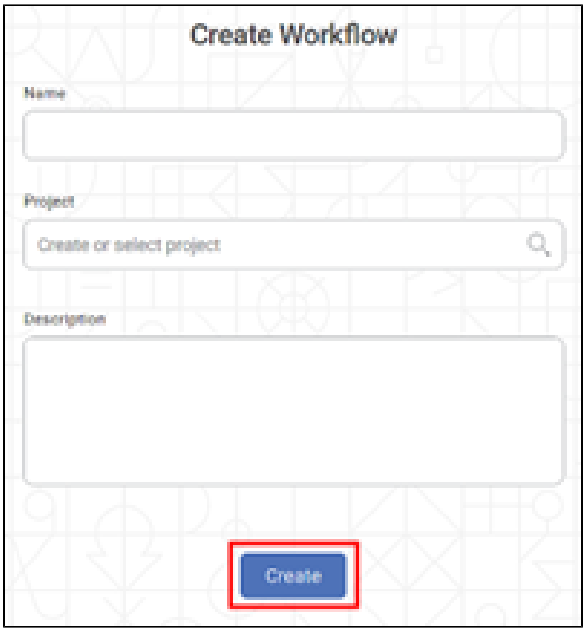
1. On the home page, click the **Create** icon ( ).
2. Hover over the **Data Integrator** tile and click the **Create Workflow** button.



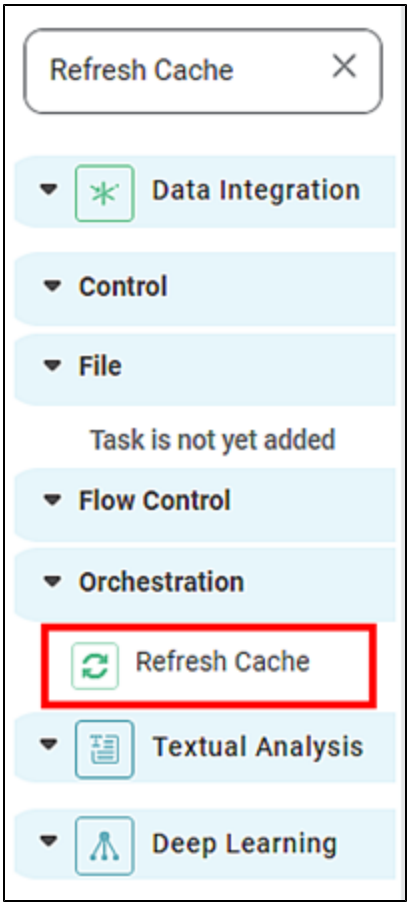
Create Workflow page is displayed.
3. Enter the **Name** for your workflow.
4. Enter the name in the **Project** field to create a new project.

Notes:	• The workflow is created under the entered project name. • You can also type the name of the existing project in the *Project* field to select the project. • The project name is mandatory.

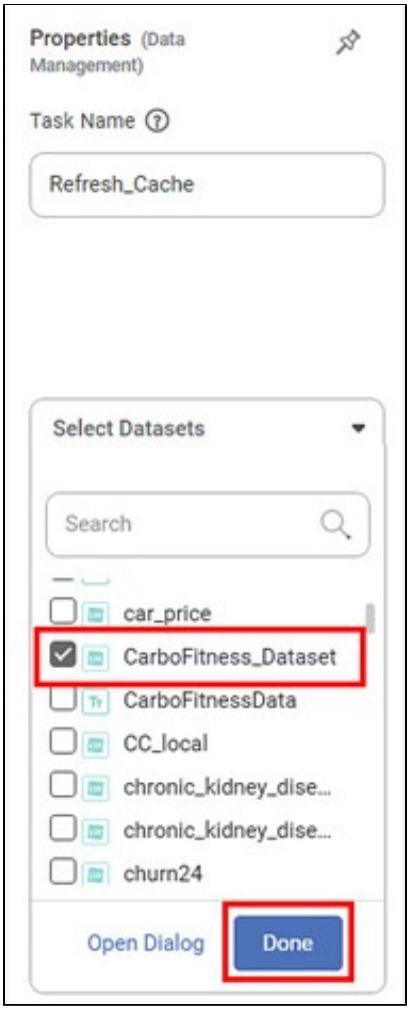
5. Enter the **Description** for your workflow.
6. Review all fields and click **Create**.



The workflow is created, and the workflow canvas is displayed.
7. Follow the path (***Data Integration >> Control >> File >> Orchestration >> Refresh Cache***) from the left Task Pane, drag and drop **Refresh Cache** on the workflow canvas.

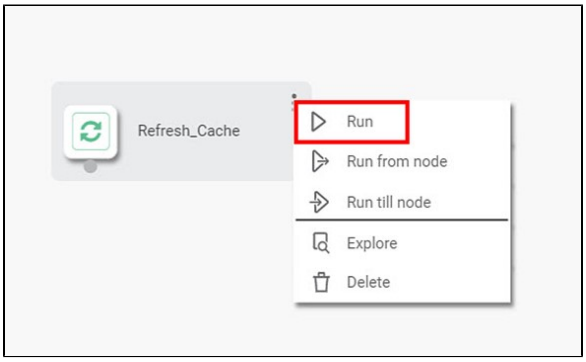


8. Select the Refresh Cache node.
   The properties pane is displayed on the right side.
9. From the **Select Datasets** drop-down, select the datasets for which the cache needs to be refreshed.



Note:	You can select more than one dataset.

10. After selecting the datasets, click **Done**.
11. Hover over the *Refresh Cache* node and click the ellipsis, and then click **Run**.



12. Schedule this workflow. Refer to *Scheduling a Workflow*.
    After the schedule is successfully created, the workflow executes at the specified time interval, and the dashboard is refreshed based on the latest data.

Notes:	• If any of the datasets selected for the Refresh Cache node are not consumed in the dashboard, an error is displayed in the Log Trace. • If you do not select any dataset for the Refresh Cache node, an error is displayed in the Log Trace.

Your Rating:

Export Dashboard Schedule

In RubiSight, you can export a dashboard using the Export functionality. Refer to *Exporting a Dashboard.*
You can not only schedule this export, but also send the dashboard pages as PDF via email, at a stipulated date and time.

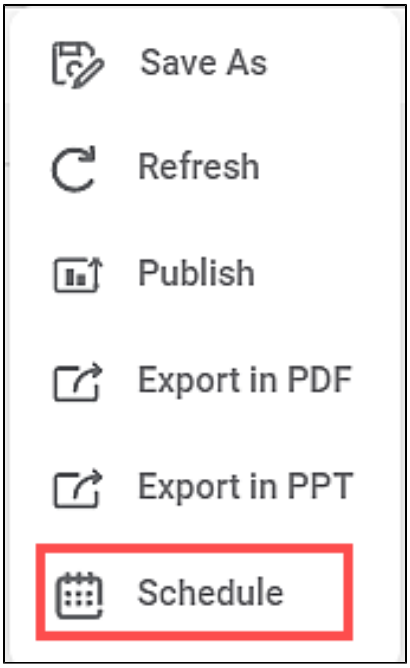
Notes:	• You can schedule to export the dashboard immediately after creating the schedule. • You can select any or all dashboard pages for export. • Each page is saved and sent as a separate PDF file.

To schedule a dashboard export, first, open the dashboard in *Edit Mode*. For this, follow the steps given below.

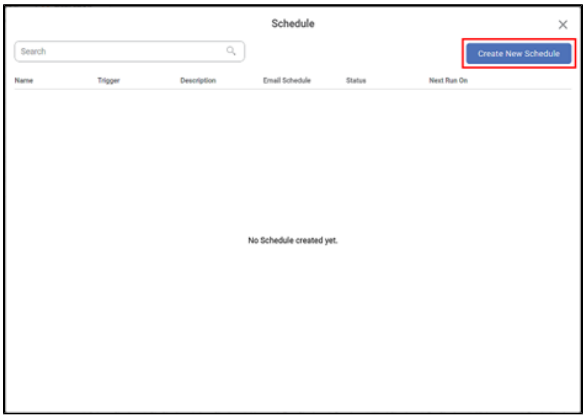
1. Open the **Workspace** that includes your dashboard. Refer to *Changing Workspace*.
2. On the home page, click **Dashboards**. Recent dashboards for the selected workspace are displayed.
3. Hover over the dashboard and click **View**. The dashboard is displayed in the view mode.
4. To display the dashboard in the edit mode, click **Edit Mode** in the top-right corner on the function pane.

To schedule the Dashboard export, follow the steps given below.

1. On the function pane, in the top-right corner, click the ellipsis (•••). The dashboard tasks menu is displayed.



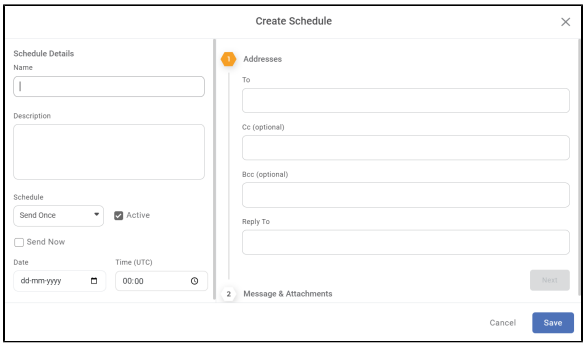
2. From the drop-down list, click **Schedule.** *Schedule* window is displayed.
3. Click **Create New Schedule**. Scheduled exports, if any, are displayed in this window.



Create Schedule page is displayed. It contains two parts.

- *Schedule Details* – to schedule export of the dashboard by schedule type, date, and time

- *Send Email* – to schedule export of the dashboard via email at the scheduled date and time



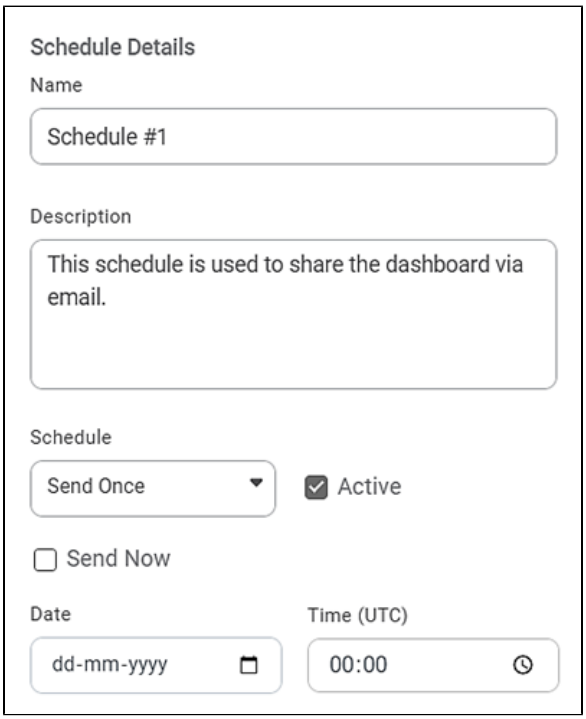
4. In the Schedule Details section, Enter a suitable **Name and Description** for your Schedule.
5. Enter **Schedule Type**. You can select from the Schedule Type options given in the table below.
6. Select **Schedule Status**.

Schedule Type	**Description**	**Related Fields**
Send Once	For one-time export of the dashboard.	• Date • Time
Daily	For daily export of the dashboard.	• From Date • To Date • Time
Weekly	For weekly export of the dashboard.	• From Date • To Date • Day of the week (*only one day can be selected*) • Time
Monthly	For monthly export of the dashboard.	• From Date • To Date • Date of the month (*only one date can be selected*) • Time
Send Now	For immediate export of the dashboard (after creating the schedule).	• No selectable fields available. • The *Save* button at the bottom of the *Send Email* section changes to *Save and Send*.

Note:	Make sure that all schedule *Time* is created as per the Coordinated Universal Time (UTC) format.

You can either keep the schedule *Active* or make it *Inactive*.

Schedule Status	**Active Checkbox**	**Description**
Active	Selected Active	• This is the default setting. • All scheduled exports are active by default.
Inactive	Cleared Active	You can make a schedule inactive if you want to create it now but implement it later.



7. In the *Send Email* section, you can create an email to be sent to the recipient(s). Here, you can add recipients and add or remove dashboard pages from the list which you want to export. The Send Email section contains two parts.

- *Addresses*
- *Message & Attachments*

Notes :

- You can choose not to send email by disabling the *Send Email* radio button ( ). In that case, the entire section gets disabled.
- In such a case, the created schedule is used to refresh the dashboard at the given date and time, or create a PDF file of the dashboard as required.
- In case the *Active* selection is *false*, nothing happens at the backend. It simply creates a schedule entity which can later be activated.

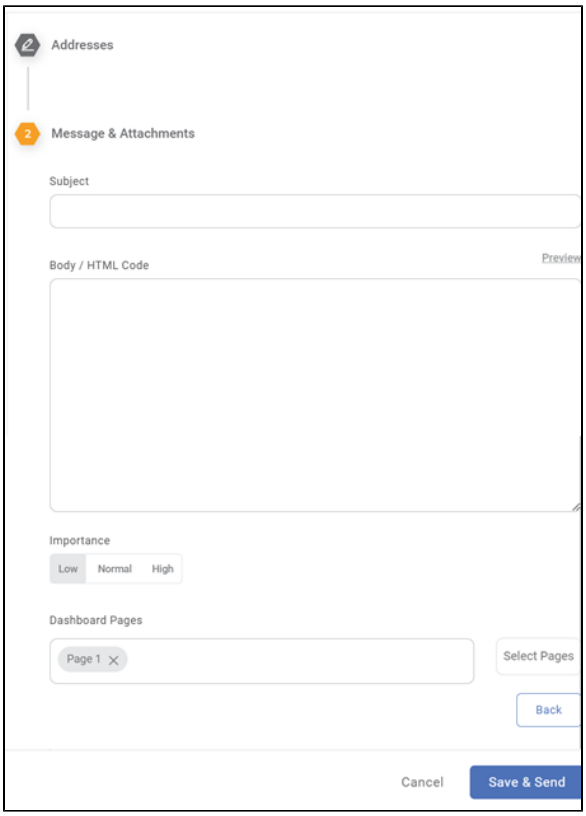
*In the **Addresses** section,*

1. Enter the recipient's email addresses in the **To** field. (mandatory)
2. Enter the email addresses of other recipients in the **Cc** and **Bcc** fields.
3. Enter the email address to which the recipient(s) can revert (in response to the email) in the **Reply To** field.
4. Click **Next**. The *Messages & Attachments* menu is activated.

- Make sure that the email addresses you enter are registered in the specified domain.

Notes :	• On receiving the email, if you click *Reply* or *Reply All* button, the email address entered in the *Reply To* field is automatically populated as the primary recipient.

In the ***Messages*** & ***Attachments*** section,

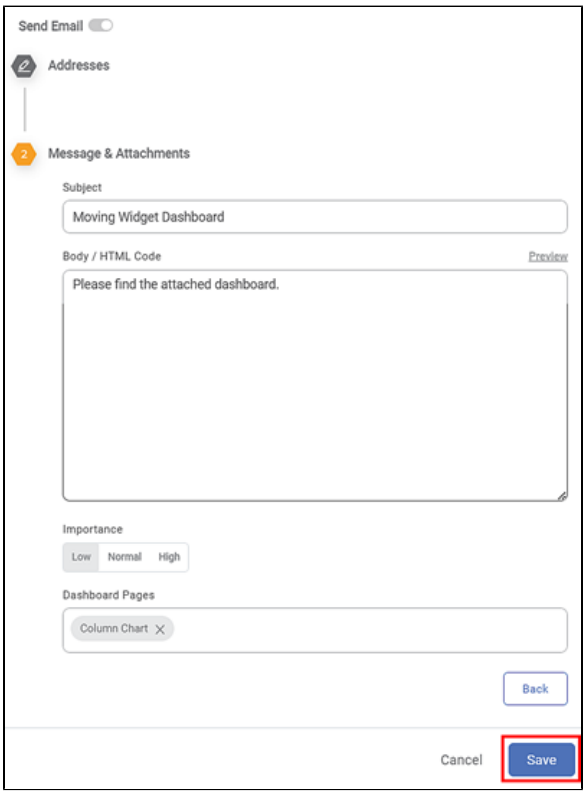


- Enter a **Subject** for the email.
- Enter a textual message as email body, or an HTML Code in the **Body/HTML Code** box.

Notes:	• HTML codes are used in case you want to
	  • highlight any part of the email body
	  • insert an image, reference or an attribute in the email body
	  • insert hyperlink to a document, the URL for a website or make a part of the email body **Bold** or *Italics*.
	• You can click *Preview* to view how the coded content would appear to the recipient in the actual email.

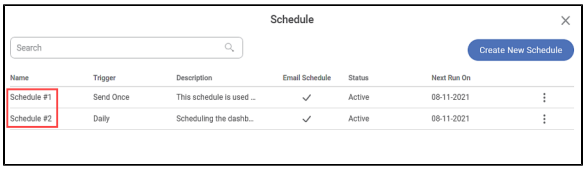
- Select the level of **Importance** for the email to be set as priority. You can select from *Low*, *Normal,* and *High* levels of importance according to the domain used and your organization's policy guidelines.
- Select the dashboard pages that you want to export via email.
- Click **Save**. The email is scheduled to be sent at the scheduled date and time.

Notes :	• All available pages of the dashboard are selected for export by default. • If you do not want to export any of the pages, you can remove them by clicking the *Close Icon* ( ). • By clicking inside the *Dashboard Pages* field, you can also see a list of all pages in the dashboard. You can select any or all pages to export. • All selected pages appear in the *Dashboard Pages* field. • You can move to the beginning of the *Send Email* section for reconfiguring the email by clicking *Back*.



You are navigated back to the Schedule window. In the window, you can see a list of all the created schedules as shown below.
You can view

Schedule name
Schedule trigger, which is the schedule type
Schedule description, Whether an email has been generated to schedule an export
Actual status of Schedule (Active/Inactive)
The scheduled next run date



Notes :

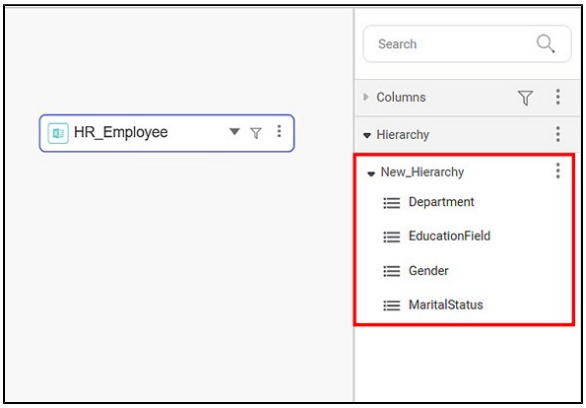
- For Send Now type of schedules, the *Status* is always *Inactive* since the email has already been triggered.
- For Send Once type of schedules, the *Status* becomes *Inactive* as soon as the email is triggered.
- For Daily, Weekly and Monthly types of schedules, the *Status* becomes *Inactive* after the last date (*To Date*) has lapsed.
- The number of *Active* schedules is displayed in the Dashboard Tasks Menu under *Schedule* in the function pane on the top right corner of the dashboard.
- You can view and use the *Edit* or *Delete Schedule* options by clicking the vertical ellipsis (⋮) corresponding to a schedule.

Your Rating:

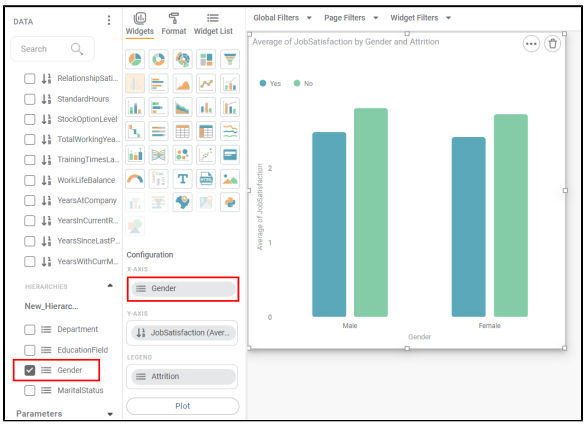
Using Dashboard Hierarchies

In a data dictionary, you can rearrange or change the order of the features in the newly created dataset using the *Hierarchy* function. The created hierarchy is used in the RubiSight application.
To use the created hierarchy in a dashboard, follow the steps given below.

1. Create a Hierarchy from datasets in the Data Dictionary. Refer to *Creating Hierarchy* in *Rubiscape User Guide*.
   For example, we create a hierarchy named New_*Hierarchy* using an *HR* dataset as shown below. The feature sequence in the newly created dataset, i.e., *Department*, *EducationField*, *Gender,* and *MaritalStatus*, is also shown in the figure below. Thus, *the Department is in the first position, EducationField is in the second position, and so on*.

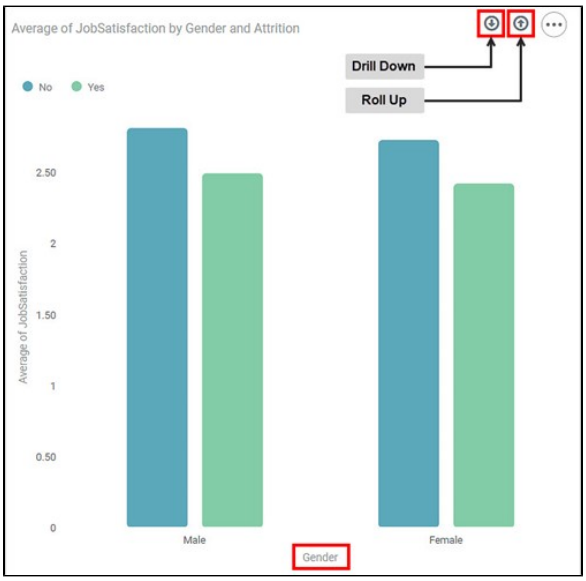


2. Create a dashboard. Make sure to select the Data Dictionary, containing the newly created hierarchy, as a dataset. Refer to *Creating a Dashboard*.
   For example, we add *DataDictionary_New*, containing New_*Hierarchy*, to the dashboard.
3. Plot a widget of your choice.
   For example, we plot a *Column Chart* of the *Average Job Satisfaction* by *Gender* with *Attrition* as the *Legend*. This chart is the default plot. Here, *Gender* is the feature selected from the newly created hierarchy. You can see that *Gender* is in the *third* position in the hierarchy.



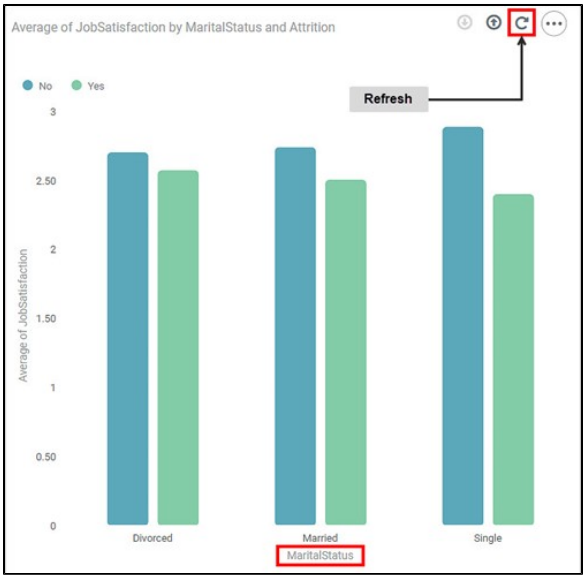
4. Save the dashboard and click **View Mode** in the top-right corner. You can now see the widget in the View Mode.
5. Two CTA arrows (Call To Action arrows) appear on the top right corner of the widget. These are

   - Drill Down ( )
   - Roll Up ( )



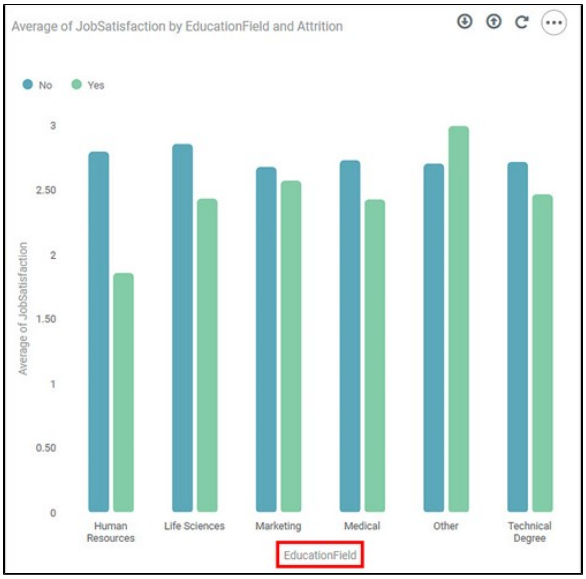
To use the hierarchy, click any of the two CTA arrows. For example, we click the *Drill Down* CTA arrow. You can see that

- The feature on the X-axis changes to *MaritalStatus,* and the graph gets replotted.
- A *Refresh* arrow appears next to the Roll Up arrow. You see the default widget with Gender on the X-axis if you click Refresh.
- The *Drill Down* CTA arrow gets disabled since *MaritalStatus* is the last feature in the hierarchy.



Starting from the Column Chart with Gender on the X-axis, click the *Roll Up* CTA arrow. You can see that

- The feature on the X-axis changes to *EducationField,* and the graph gets replotted.
- A *Refresh* arrow appears next to the Roll Up arrow. You see the default widget with Gender on the X-axis if you click Refresh.
- None of the CTA arrows gets disabled since *EducationField* is neither the hierarchy's first nor the last feature.



Notes:

- The created hierarchy can be used only in the RubiSight application.
- Make sure to save the dashboard before navigating to the View Mode.
- The hierarchies can be applied to any number of widgets plotted on the dashboard page.
- The widgets for which this feature is supported are:
  - Column chart
  - Area chart
  - Line chart
  - Bar chart
  - Stacked-bar chart
  - Stacked-column chart
  - Stacked-area chart
  - Scatter plot
  - Waterfall chart
  - Pie chart
  - Donut chart
  - Scatter plot
  - Treemap chart
  - Wordcloud chart
- If you select a numerical column to be added in a hierarchy, you need to change its data type to categorical.
- For the columns selected in the hierarchy, all *CRUD* operations (*Create, Read, Update* and *Delete)* can be performed only in the Data Dictionary. (and not in the RubiSight dashboard)

Your Rating:

Working with Widgets

What is a Widget

A widget is a RubiSight dashboard component that can be a chart, a graph, a map, a card, an image, or a table. Each of these widgets has a specific purpose and is used to enhance the visual appeal and the presentation of the data.
These widgets are chosen based on the

- Number of dimensions to be plotted
- Available variables and their types
- Kind of correlation or comparison expected to be plotted
- Trends, patterns, and predictions to be built
- Kind of story you want to create out of the available data

Elements of Widget

Each widget needs specific elements or a set of parameters to build. The choice of these parameters depends on the type of widget being used. Some widgets are built based on just one parameter, while some others need four to five parameters. The most common parameters/elements present in the widgets are explained below.

X-Axis

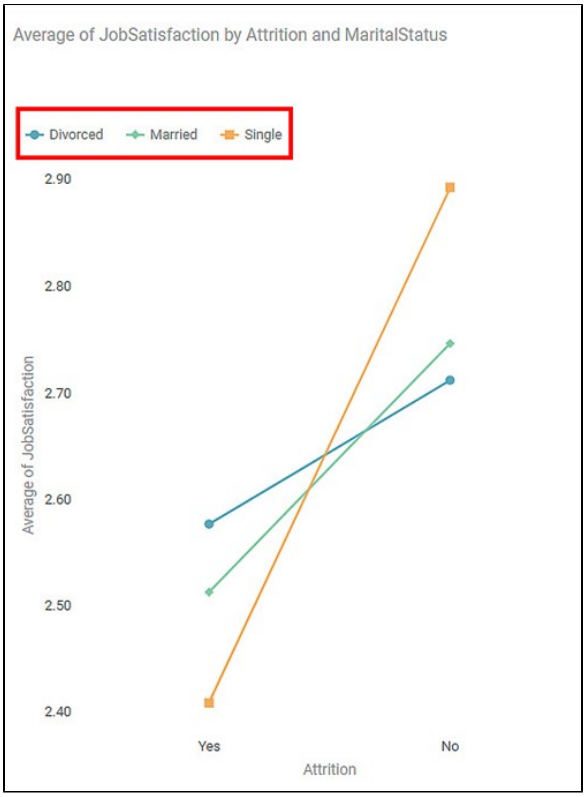
X-axis, or the horizontal axis, is used to plot the independent variable. It can either be a numerical or categorical variable. The coordinates on the X-axis are called *labels,* and the variable represented on the X-axis is called the *title*.

Y-Axis

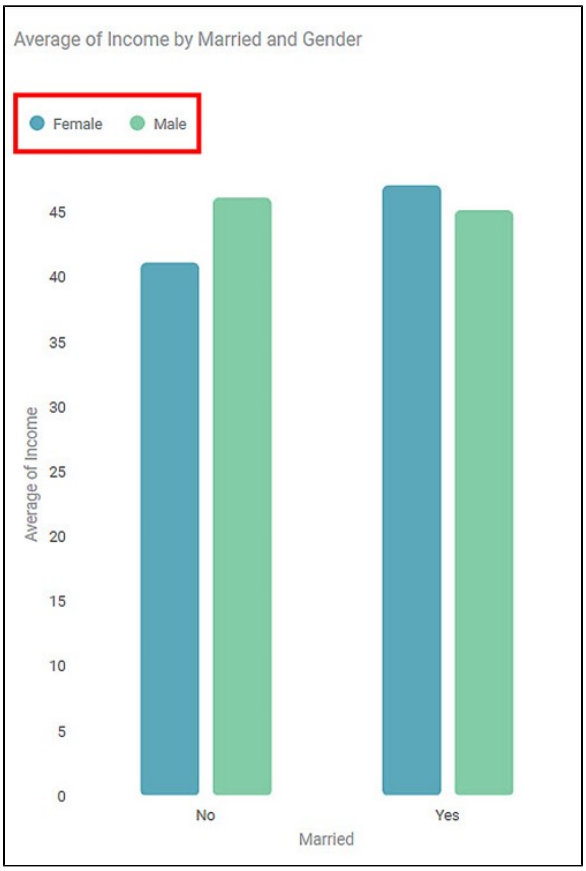
Y-axis, or the vertical axis, is used to plot the dependent variable. It can either be a numerical or a categorical variable. The coordinates on the Y-axis are called *labels,* and the variable represented on the Y-axis is called the *title*.
The plot (area on the chart between the X-axis and Y-axis) is usually divided into gridlines. These gridlines form a mesh of crisscross horizontal and vertical dotted lines. These lines make it easy to plot the graph or chart and helps us understand them better.

Legend

A legend (in a chart or graph) shows the kind of data represented by the chart. Legends explain the markings, symbols, colors, and characters on a chart or graph.
In the chart shown below, the highlighted portion gives the color legends used in the chart. It indicates the colors corresponding to the three categories of products.
An example chart with Legend as *Marital Status* is shown below.



Another example chart with Legend as Gender is shown below.



Dimensions

Dimensions represent the categorical variables in the given dataset.

Measures

Measures represent the continuous numerical variables in the given dataset.

Notes:	• You may need to select the elements such as Category, Value, Minimum, Maximum, and Target in some of the widgets. • You should select the appropriate type of dimension and measure for configuring the widget.

Your Rating:

Table of Contents

- What is a Widget
- Elements of Widget
    - X-Axis
    - Y-Axis
    - Legend
    - Dimensions
    - Measures

Creating Visualization using Widgets on Dashboard

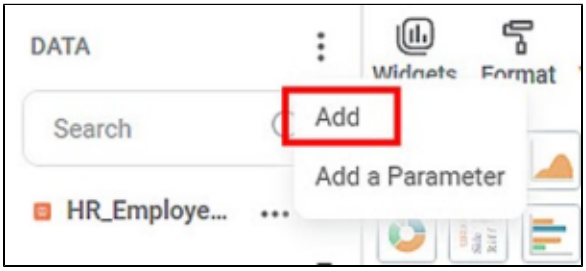
You can create different visualizations using the different types of widgets provided by RubiSight. When the same data is represented in different ways, it can give different insights and help the decision-making process.
The following sections explain the different functions for creating visualizations.

Your Rating:

Adding Dataset in RubiSight

You can add a dataset to your existing dashboard.
To add a dataset, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard.
   The Dashboard is displayed.
2. In the *DATA* pane, click the ellipsis (⋮) and click **Add**.

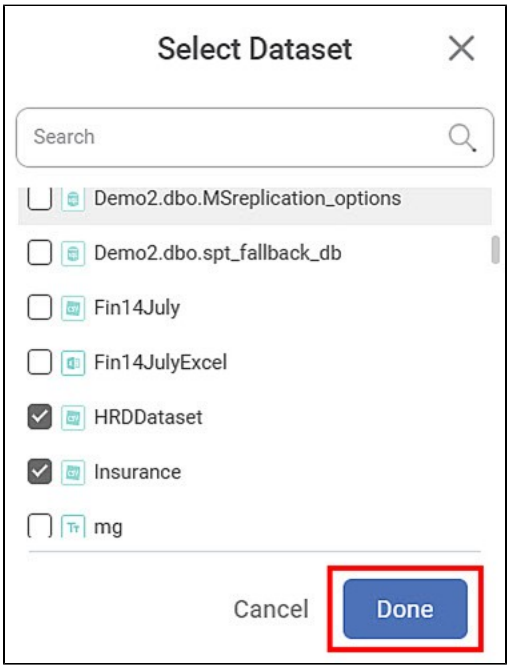


Select Dataset window is displayed.

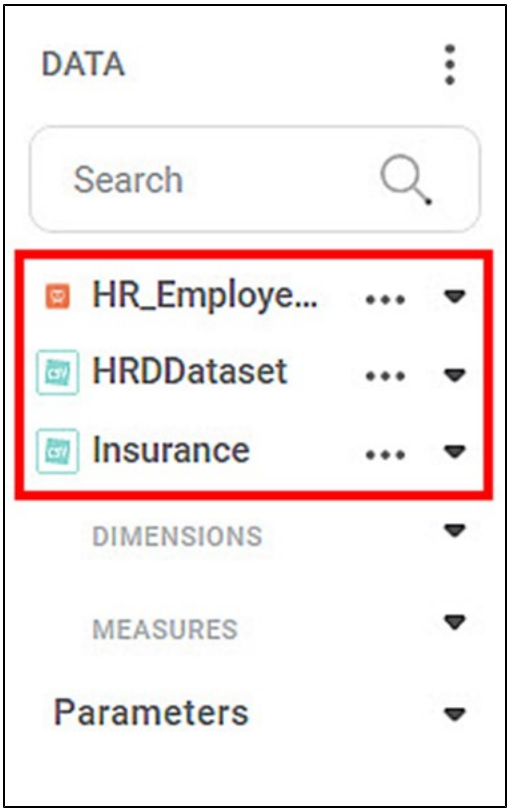
3. Select the check box corresponding to the dataset you want to add to the dashboard.

Notes:	• You can select more than one dataset to add to the dashboard. • You can enter the name of the dataset in the *Search* field.

4. Click **Done**.



The selected dataset(s) are added to the dashboard and are displayed in the *DATA* pane as shown in the figure below.


DATA
Search
HR_Employe...
HRDDataset
Insurance
DIMENSIONS
MEASURES
Parameters

Your Rating:

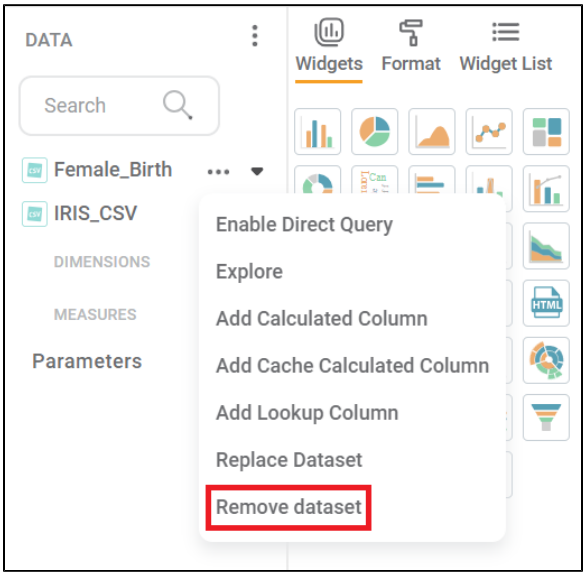
Removing Dataset from RubiSight

You can remove the dataset from your existing dashboard.

Note:	• Dashboards must include at least one dataset. If your dashboard contains only one dataset, it cannot be removed.

To remove the dataset, follow the steps given below.

1. Open the dashboard in edit mode. Refer to Editing a Dashboard.
2. In the DATA pane, click the ellipsis corresponding to the dataset you want to remove, and then click Remove dataset.



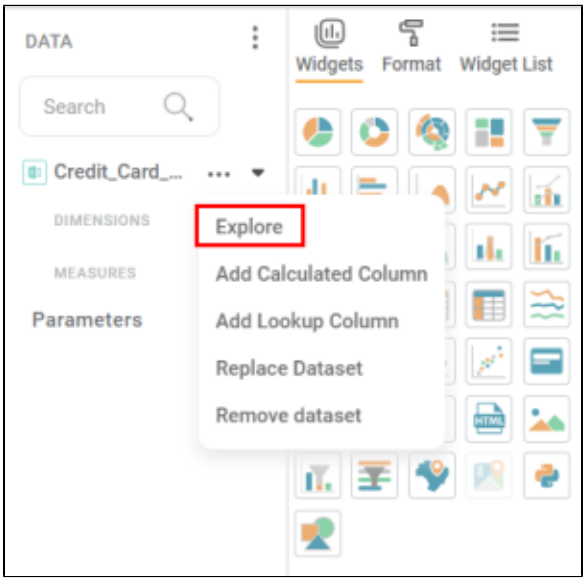
3. A window pops up. Click on "Remove" to remove the dataset. Click on 'Cancel' to cancel the action.

Your Rating:

Exploring Datasets in RubiSight

Exploring datasets gives you an idea about the various data types present and the widgets that can be used to plot them.
To explore a dataset, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard. The Dashboard is displayed.
2. In the **DATA** pane, click the ellipsis corresponding to the dataset you want to explore, and then click **Explore**.



The explored dataset is displayed with all its properties and values.

Note	Hover over the chart in the column to view more details.

Your Rating:

Creating Charts using Widgets

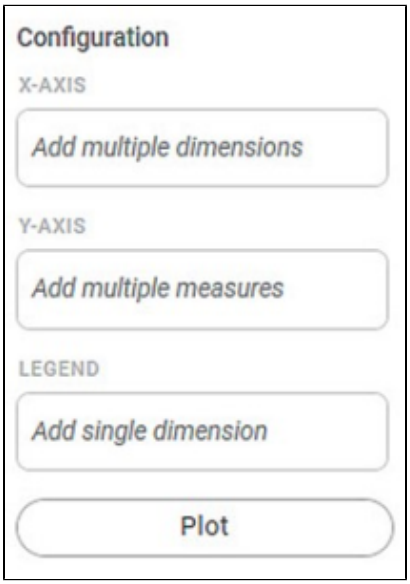
To create a chart using widgets, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard.
   The Dashboard is displayed.
2. In the **WIDGETS** pane, click the widget you want to use.

Note:	Hover over any widget to see its name and the number of dimensions and measures required to plot it.

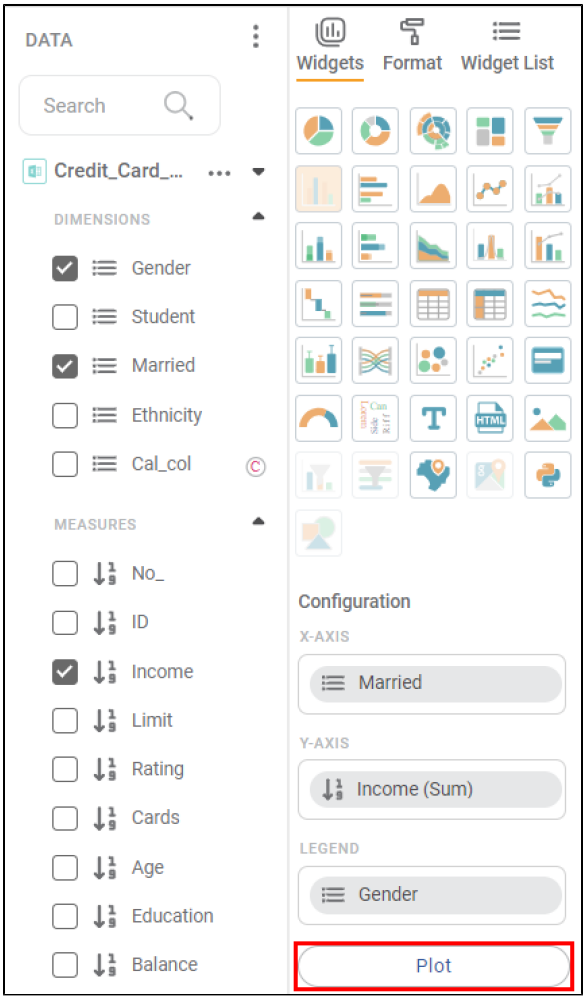
   The selected widget is added to the dashboard canvas.
3. Select the widget added on the dashboard canvas. For example, here we consider a Column Chart.
   The corresponding *Configuration* settings are displayed in the WIDGETS pane.

Notes:	• The *Configuration* setting varies depending upon the selected chart. • You can add multiple widgets on one canvas.

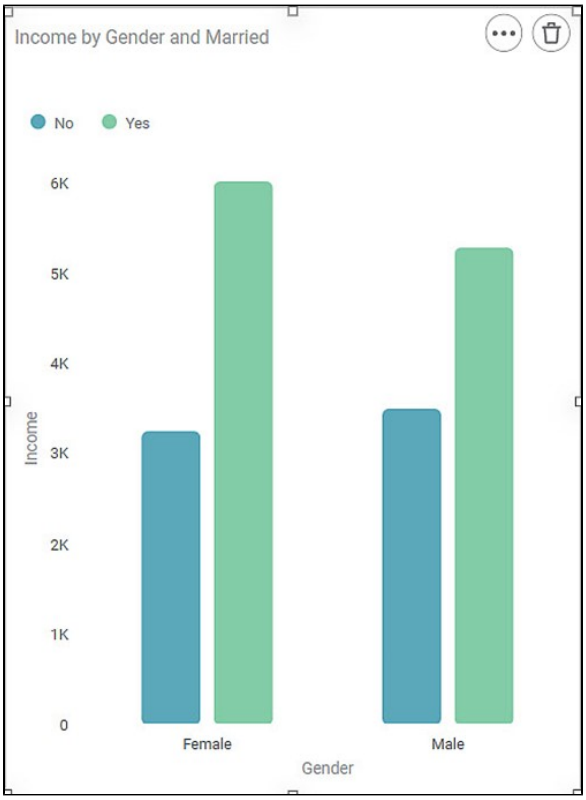


4. From the **DATA** pane, drag-and-drop the **DIMENSIONS** and **MEASURES** in the appropriate **Configuration** fields, and then click **Plot**. For example, here we drag-and-drop *Gender* in **X-Axis**, *Average Income* in **Y-Axis**, and *Married* in **Legend**.

Note:	You can add new columns to your dashboard by Adding Calculated Column to Dashboard.



The chart is plotted depending upon the dimensions and measures added in the configuration.



Notes:

- To add a new page, click (+) on the *Dashboard Page bar*.
- For more options, click (Page 1) on the *Dashboard Page bar*. The available options are,
  - Duplicate
  - Delete
  - Rename
  - Move Right
  - Move Left
- Once the dashboard page is deleted, it is permanently erased.
- You can format the chart using the *FORMAT* option in the widget pane. Refer to Formatting a Widget.
- While configuring a widget, when you plot a measure type variable, you are provided with the option of changing its aggregation method.
- The various aggregation methods in RubiSight are listed below.
  - *Count*
  - *Count (Distinct)*
  - *Sum (default)*
  - *Maximum*
  - *Minimum*
  - *Average*
- Apart from the *Aggregation* methods mentioned above, you can also choose to display the values as *Percentage* in the widget.
- To change the aggregation method, hover over the value, and click the gear icon (Income (Sum)). Select the required method from the list.
- After you make any changes to fields or parameters, click *Plot* to apply those changes to the chart.

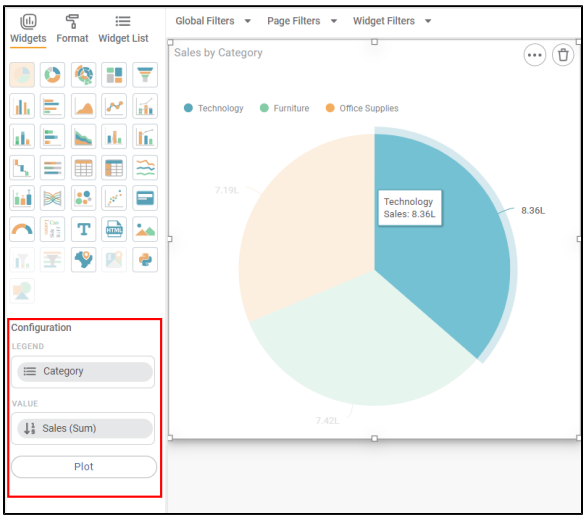
Your Rating:

Percentage Calculations

For widgets like pie charts and donut charts, it is sometimes required to display the values as a percentage of the share of each section in the total share. For this, Rubiscape provides a Percentage functionality alongside the Aggregation methods to display the values on the tooltip as percentages.

Let's plot a pie chart of the Sales by Category as an example.

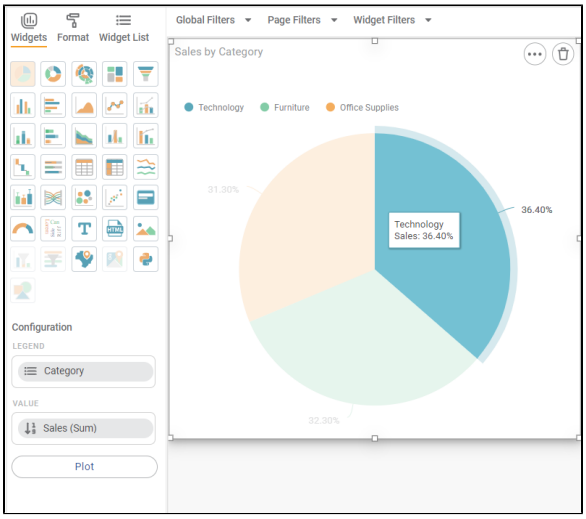
If you hover over any section, its actual *Sales* value is displayed. For example, the Technology Sales is 836154.03. This is the *Technology* share out of the total *Sales* of *Technology*, *Furniture*, and *Office Supplies*.



Now, we want to express each share as a percentage to understand the contribution of each Category to the total *Sales*.

In configuration pane, hover over **Sales**, click the gear icon (⚙), select the **Percentage** checkbox, and click **Plot**.

You see that the Sales values are now expressed as a percentage. For example, the *Technology* sales contribute to 36.40% of the total sales.



Your Rating:

Creating a Map Widget

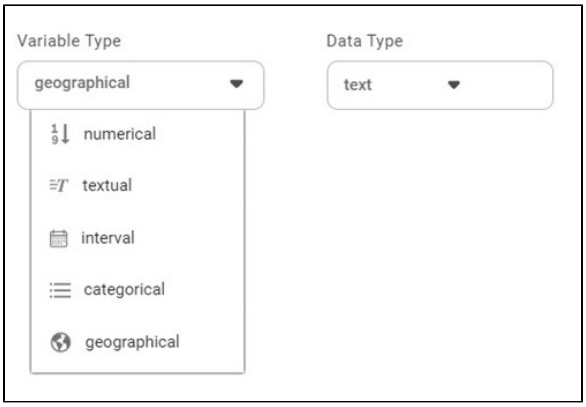
In RubiSight, you can create a map widget if your dataset contains geographical variables.

Geographical Variable

In RubiSight, a new variable type called geographical is added to represent a location. It is supported for the below-listed location identifiers.

- Region
- State
- Country
- Continent
- Subcontinent

The geographical variable is denoted by the *earth symbol* ( ), and its Data Type is *Text*.



To create a dataset containing Geographical variable type, refer to Creating a Dataset with Geographical Variable Type.

Notes:

- The geographical variable is mainly classified for the *Map* widget in RubiSight. The main purpose of mapping unmapped/unknown locations is to use these values in the *Map* widget to plot the respective areas. When you plot the *Map* widget, it receives the mapped geographical location variable values from the dataset.
- Mapped geographical location values are used for all charts. Also, these values are visible when you explore the dataset.
- The geographical variable cannot be used in *Google Maps* widget because the locations in these maps are identified by *latitude* and *longitude*.

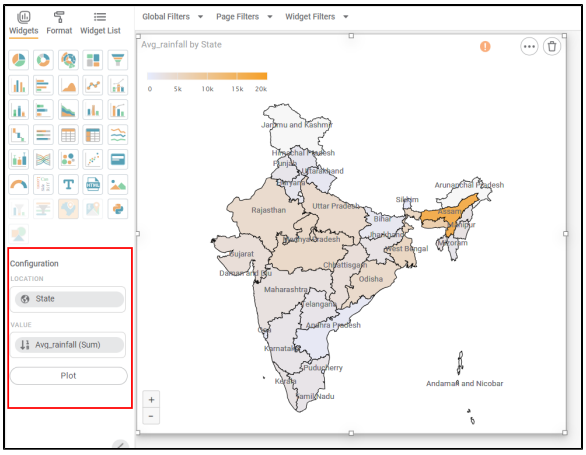
Creating a Map Widget using Geographical Variable

In RubiSight, a geographical variable type is used to represent the location type of features on Map widgets.

To add a dataset containing a geographical variable type column and plot a Map Widget, refer to *Creating Visualization using Widgets on Dashboard*.

In the following example, we create a Map widget using the *Rainfall in India In February 2023* dataset. In the dataset, the *Location* column contains the names of Indian states/regions and union territories, which are geographical variables.

We plot the data for the *Average Rainfall by States.*



Notes:

- The above map is India with Disputed Territories.
- If the dataset contains some unmapped locations, a warning symbol ( ) is displayed on the widget.
- When you hover over the symbol, you can see the number of unmapped locations.
- No exclamation mark on the widget is observed when all locations are mapped.
- The regions are colored with varying shades according to the aggregated value of the selected measure column. In this example, the selected measure is Average Rainfall by locations. The darker the color, the more is the Rainfall in that region.
- When you hover over a region, you can see the value of the measure variable selected. In the example, you can see the Average Rainfall by states.

Scenario 1:

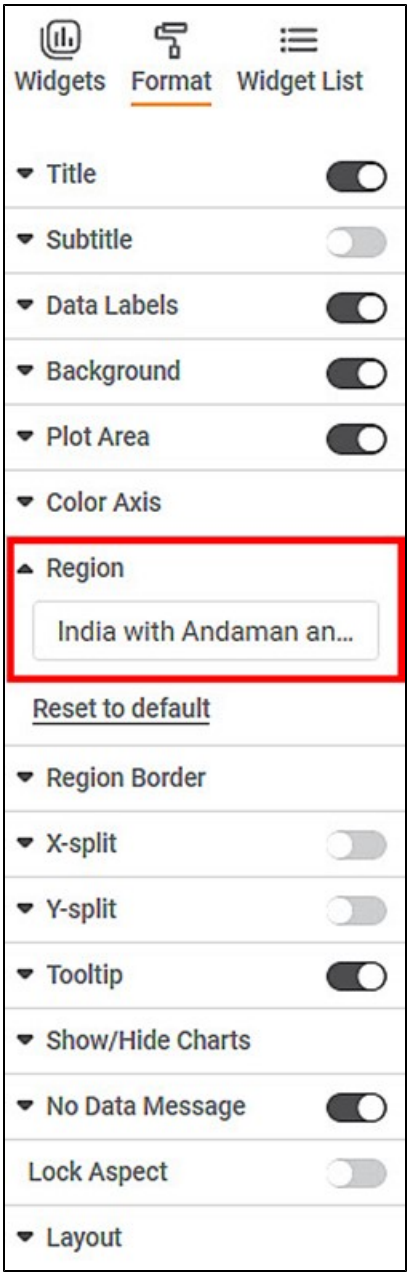
In datasets containing regions from India, you can view different maps –

- India with Disputed Territories
- India with Andaman and Nicobar

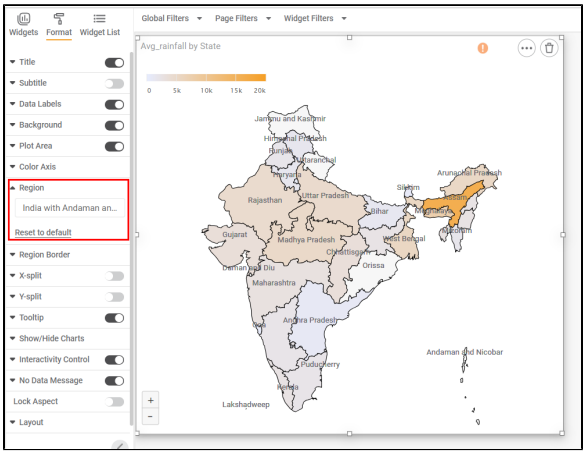
For example, the map plotted in the figure is of *India with Disputed Territories.*

To change the map, follow the steps given below.

1. In the widget pane, click **Format**.
   The Map Widget formatting options are displayed in the pane.
2. Click the **Region** drop-down.
3. Type the name of the map that you want to view. Partial text is also allowed.
   In the example, we select *India with Andaman and Nicobar.*



The map is changed to *India with Andaman and Nicobar*.



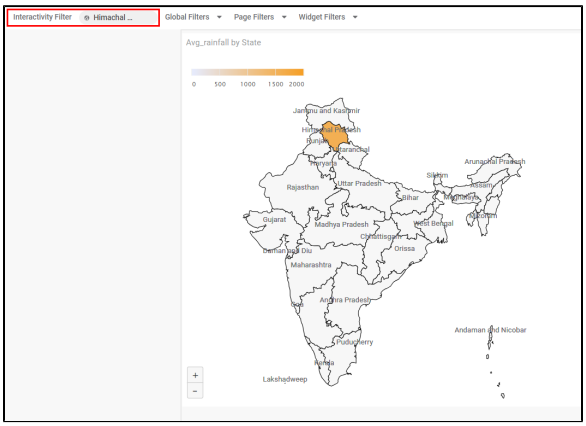
Notes:	In this map, you can see, • Region like Telangana is not visible (since Telangana was formerly a part of Andhra Pradesh).

Scenario 2:

In *View Mode*, you can apply the interactivity filter by selecting a region. In this case, only the selected region is highlighted, and other regions are disabled.

In the example, when you click Himachal Pradesh, you see that the region is highlighted and the Average number of Rainfall is displayed in it.

At this time, all other regions are disabled.



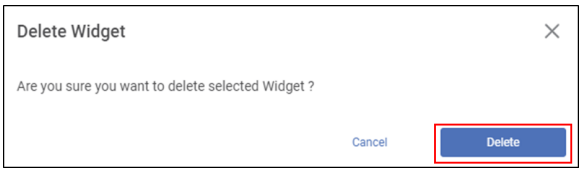
Your Rating:

Deleting a Widget

Deleting a Widget

Deleting a widget removes any unwanted chart, graph, or table you want to discard from the dashboard.
To delete a widget, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard.
   The Dashboard is displayed.
2. Browse and open the widget that you want to delete.
3. Click on the widget.
4. Click the delete icon ( ) in the top-right corner of the widget
5. A window pops up. Click on ‘Delete’ to delete the widget. Click on ‘Cancel’ to cancel the action.
   Click on ‘Cancel’ to cancel the action.



Your Rating:

Direct Query

"Direct Query" is the term that usually refers to a feature in Data Visualization. It fetches the real-time data from the underlying data source. The direct query option is useful when dealing with large datasets that are unable to import efficiently into the dashboard.

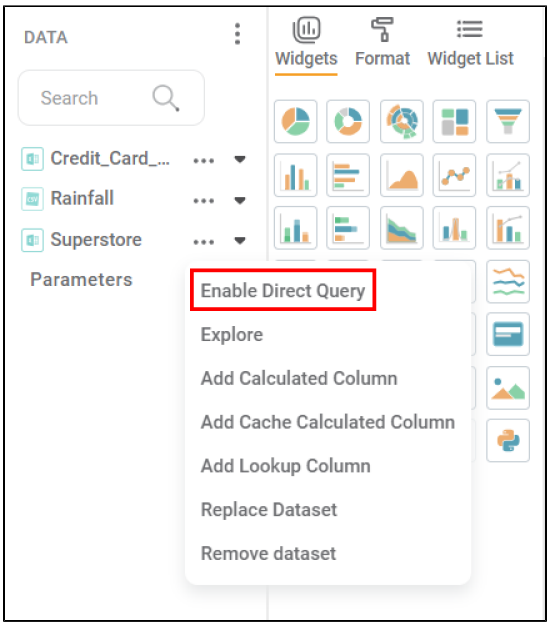
The direct query option does not create cache files and reads the data directly from the live data source. RubiSight Dashboard provides the function to enable/disable Direct Query at the dataset level. This option is applicable for that particular dashboard level and will work as set at other dashboard levels.

Your Rating:

Enable Direct Query

To Enable Direct Query for a dataset in the dashboard, follow the steps below.

1. **Open** the **dashboard** in edit mode. Refer to *Editing the Dashboard*. The dashboard is displayed.
2. If required, add a new **dataset** to the dashboard. Refer to *Adding a dataset to the dashboard*.
3. In the **Data Pane**, **click** the **ellipsis** corresponding to the dataset, and then **click *Enable Direct Query*** from the listed option.



Enable Direct Query window appears.

4. **Select OK** and **Save** the **Dashboard**. Direct Query is enabled for the dataset in the dashboard.

Notes

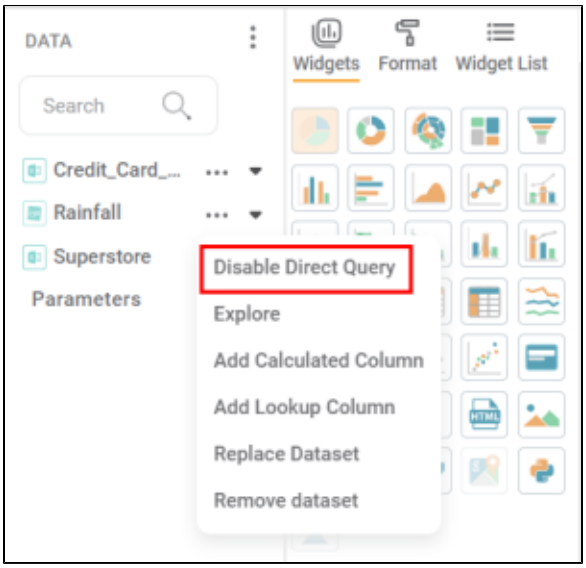
- If you select the "Disable Cache" option while creating the dataset, the "Enable Direct Query" option will not be available in the dashboard and the dataset will work as a Direct Query.
- If you select the "Enable Direct Query" option, the "Add Cached Calculated Column" option will not be available for the respective dataset in the dashboard.
- If you select the "Disable Cache" option while creating the dataset, the "Add Cached Calculated Column" option will not be available for the respective dataset in the dashboard.
- "Cached Calculated Column" will behave as a calculated column when the respective dataset is enabled with Direct Query in the dashboard or the Disable Cache option is enabled in the dataset.

Your Rating:

Disable Direct Query

To Disable Direct Query in a dataset in the dashboard, follow the steps below.

1. Open the dashboard in edit mode. Refer to *Editing the Dashboard*. The dashboard is displayed.
2. In the Data Pane, click the ellipsis corresponding to the dataset, and then click ***Disable Direct Query*** from the listed option.



Disable Direct Query window appears.

3. **Select OK** and **Save** the **Dashboard**.

Direct Query is disabled for the dataset in the dashboard. Now, Cache files will be generated from the dataset, and widgets will retrieve data from the cache

Your Rating:

Calculated Columns in RubiSight

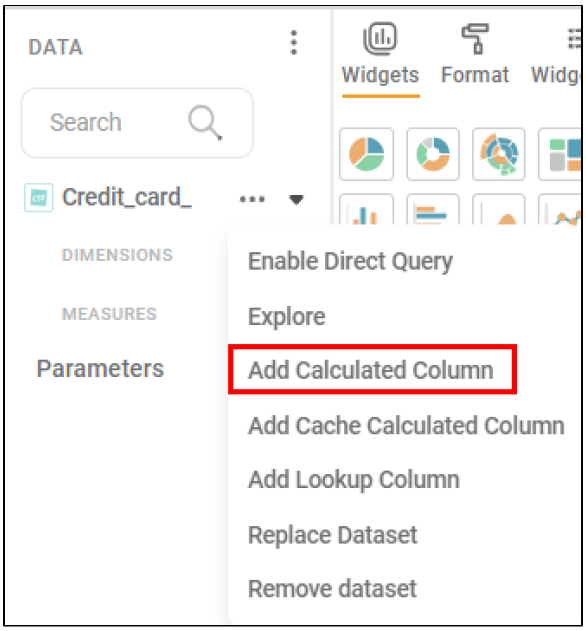
RubiSight provides a function to add a new column that is not originally present in your dataset. You can create a new column by doing some calculations on the existing columns. RubiSight uses the *Expression* function for creating a new column using various operators. For more information about operators in Rubiscape, refer to Operators in Expression Builder.

Your Rating:

Adding Calculated Column to Dashboard

To add a calculated column to your dashboard, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard.
   The dashboard is displayed.
2. Add a dataset to the dashboard. Refer to Adding Dataset in RubiSight.
3. In the DATA pane, click the ellipsis corresponding to the dataset, and then click **Add calculated column**.



The *Add Calculated Column* page is displayed.

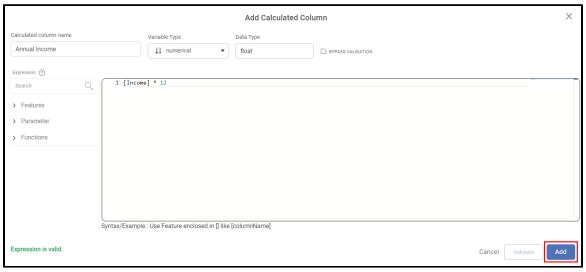
The table given below describes the different fields present on the *Add Calculated Column* page.

Field	Description	Remark
Calculated Column Name	It allows you to enter the name of the newly created calculated column.	—
Variable Type	It allows you to select the variable type of the feature. If it is not selected, the system defines the variable type on the click of *Validate*.	The available options are, • Categorical • Numerical • Interval
Data type	It displays the data type of the feature based on the selected variable type. The system defines it as per the output type of the expression.	—
	Hyperlink to access the online help for Expression.	—

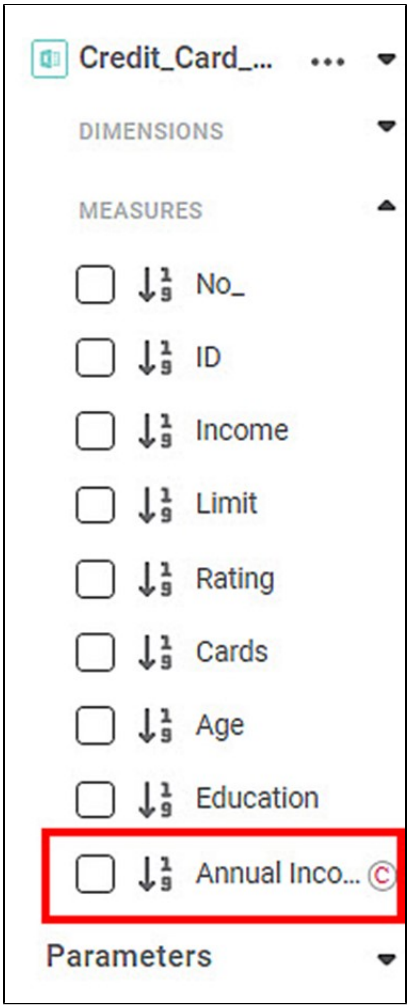
Cancel	It deletes the built expressions and closes the *Add column Page*. It removes the unsaved changes.	—
Validate	It validates the expression based on the selected features, operators, and the variable type of the newly created column. It also returns the data type of output of the given expression.	—
Add	It adds the newly created column to the dataset features.	—

On the Add Calculated Column page,

1. Enter the **Calculated column name**.
2. Select the **Variable Type** from the drop-down. This step is optional. If you do not select the variable type, the system defines it on the click of *Validate*.
3. Build your expression for a new column to be added. Refer Expression.
4. Once the expression is ready, validate the expression. Click **Validate**.
   If the expression is valid, *Expression is valid* message is displayed.
5. To add the new calculated column, click **Add**.



The newly calculated column is added to the dashboard and is displayed in the list with a © symbol. It can be used to plot widgets.

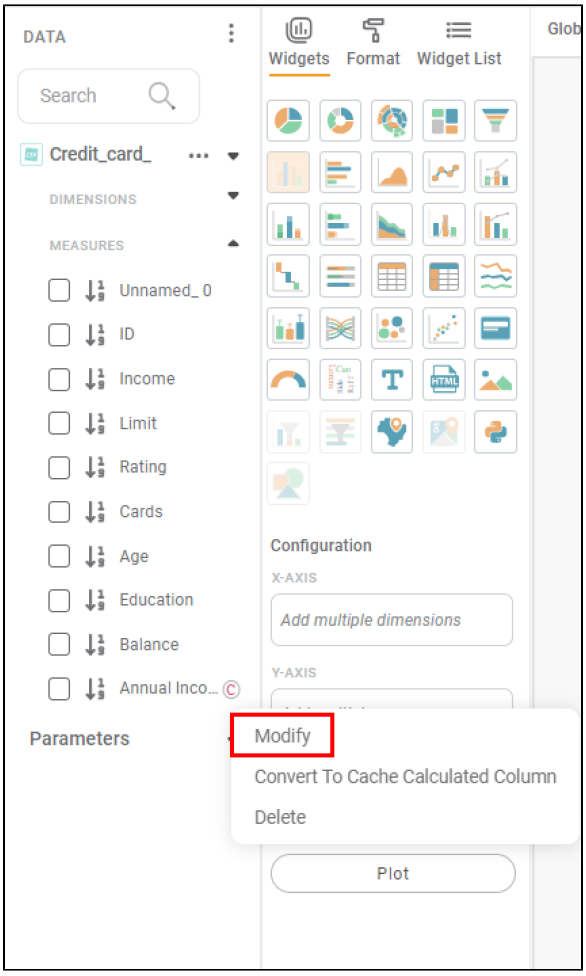

Credit_Card_...
DIMENSIONS
MEASURES
No_
ID
Income
Limit
Rating
Cards
Age
Education
Annual Inco...
Parameters

Your Rating:

Editing Calculated Column

You can edit the calculated column. To edit a calculated column, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard.
   The dashboard is displayed.
2. In the *DATA* pane, locate the required dataset and then click the drop-down (▼).
3. Hover over the required calculated column, click the ellipsis and then click **Modify**.



Note :	The calculated column is displayed with a copyright symbol (©) next to it.

   The *Edit Calculated Column* page is displayed.
4. Modify the expression as required. Refer to steps 4 to 8 of Adding Calculated Column to Dashboard.
5. Click **Update**. The column is updated.

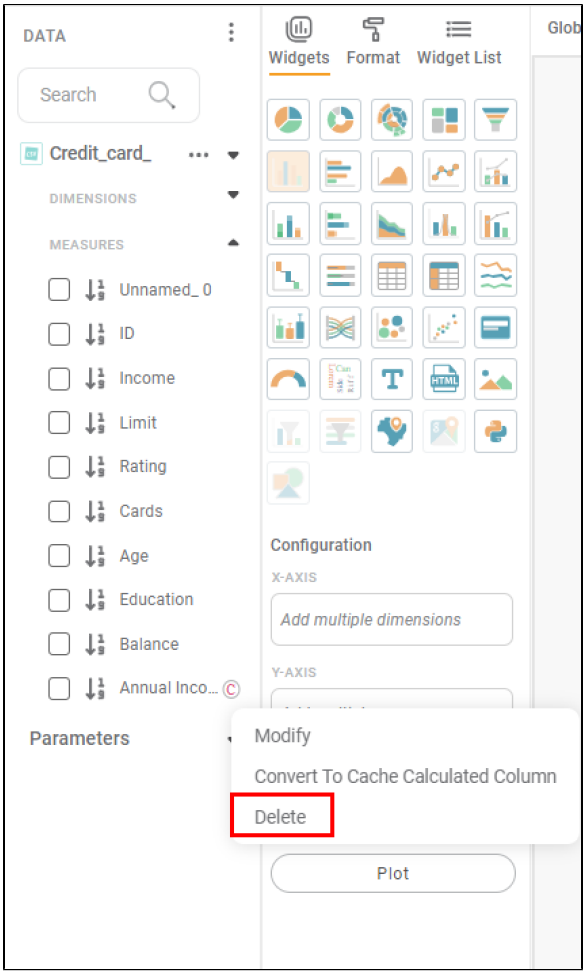
Your Rating:

Deleting Calculated Column

You can delete the calculated column from the dashboard. To delete a calculated column, follow the steps given below.

Note:	The calculated column is displayed with a copyright symbol (©) next to it.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard.
   The dashboard is displayed.
2. In the *DATA* pane, locate the required dataset and then click the drop-down (▾).
3. Hover over the required calculated column, click the ellipsis and then click **Delete**. A message to confirm your action is displayed.



4. Click **Delete**. The calculated column is deleted, and a confirmation message is displayed.

Your Rating:

Using Aggregation Function in Calculated Column

Aggregation functions calculate a scaler value such as maximum, minimum, count, or sum for all rows in the column by using the expression.

Rubiscape lets you use the aggregation function by creating separate calculated columns for each expression.

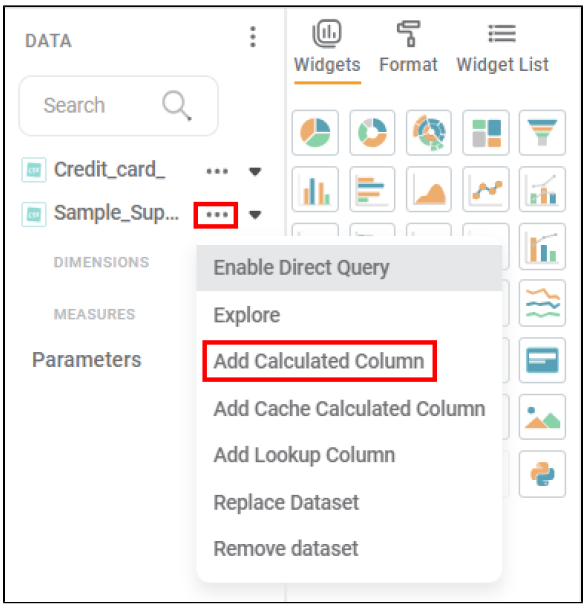
Rubiscape offers the following aggregation methods:

- Count
- Max
- Mean
- Min
- Nunique
- Sum

You can create a calculated column that calculates the ratio of the Sum of Profit by Count of Segment.

To use the aggregation method to calculate the ratio follow the steps below

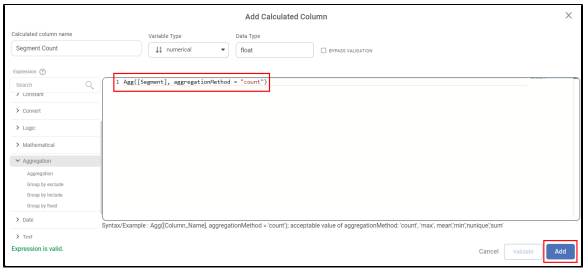
1. To add a calculated column, From the **Data panel** select horizontal **ellipse** and select **Add Calculated Column.**



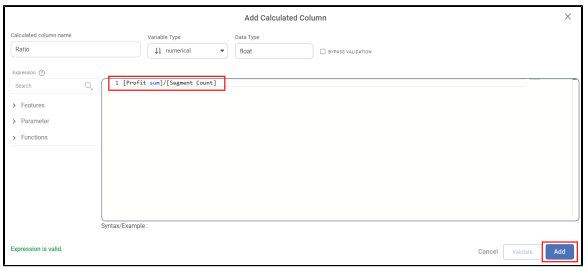
2. **Code Editor** window appears. **Enter the name** for the column and enter the **Expression**. **Validate** the expression. After successful validation, select **Add**.

   Here, we created the **ProfitSum** column with **Expression** >>
   Agg([Profit], aggregationMethod = "sum").
   For More Information, Refer Aggregation Operators.

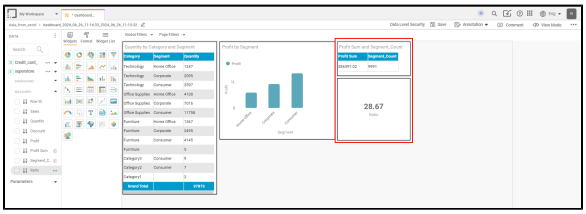
3. Similarly, create a new calculated column. Here, we add the column with the name **SegmentCount** with the **Expression** >>
   Agg([Segment], aggregationMethod = "count")



4. Now, let's add a new column to calculate the ratio between the two aggregated columns. Here we added a new calculated column as **Ratio** wi th the **Expression >> [ProfitSum] / [SegmentCount]**.



5. Finally, we added a Table widget and a Card widget to the Dashboard canvas to display the result. The following screenshot shows the result.



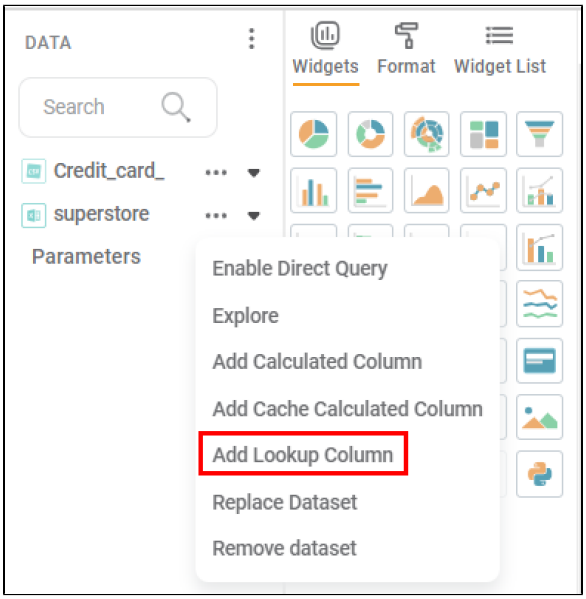
Your Rating:

Add Lookup Column in Dashboard

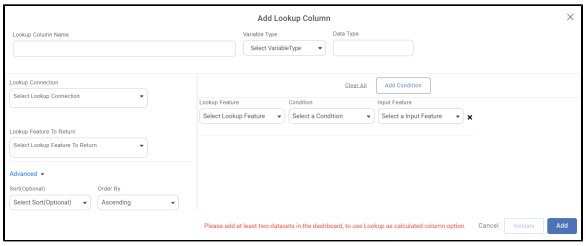
The Lookup feature helps you to match the values between two or more data sources. It is used to determine the presence of a particular field from one data source to another. The Lookup functionality in Rubiscape allows you to connect two data sources and compare them based on certain conditions. Lookup checks all the values in the given data sources and matches the records from one data source to another for the selected fields.

To add a lookup column in a dataset in the dashboard, follow the steps given below:

1. Open the Dashboard in edit mode. Refer to *Opening the Dashboard*.
   The Dashboard is displayed.
2. Add a dataset to the Dashboard. Refer to *Adding a dataset to the dashboard*.
3. In the **DATA pane**, click the ellipsis corresponding to the dataset, and then click ***Add Lookup Column*** from the listed options.



The *Add Calculated Column* page is displayed.



4. Enter the **Lookup Column Name**.
5. Select the **Variable Type** from the dropdown. The available options are *Categorical, Numerical, and Interval.*
6. Select the **Lookup Connection** dropdown to connect another dataset.
7. Click the **Lookup Feature To Return** dropdown to select the feature column from the chosen dataset in the **Lookup Connection**.
8. Select the **Add Condition** button to create an expression.
9. From the **Lookup Feature** drop-down, select a feature of the lookup dataset.
10. From the **Condition** drop-down, select the comparison operator. Available operators are

Available Operators	For Categorical Variables	For Numerical Variables
<	✓	✓
<=	✓	✓
<>	✓	✓
=	✓	✓
>	✓	✓
>=	✓	✓
Double Metaphone	✓	✗
Metaphone	✓	✗
Threshold Matching	✓	✗

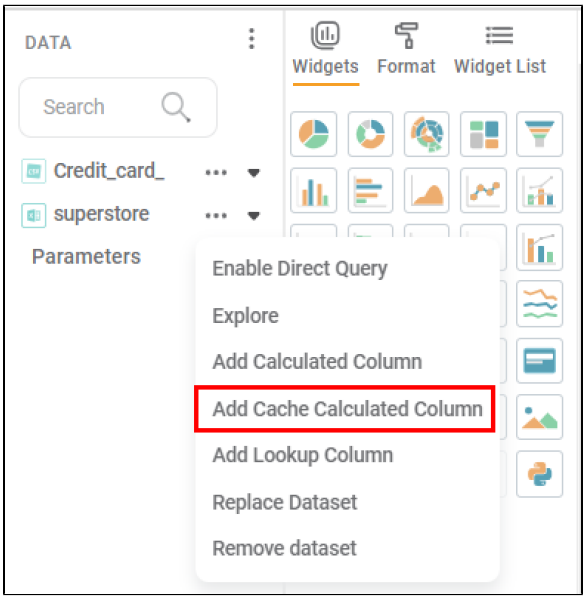
11. Select the **Input Feature** to select the value from the dataset where you want to add the Lookup column.
12. Click on **Validate** to validate the Expression.
13. After validating the expression, click **Add** to add the lookup column. A Lookup Column is created in the existing dataset.

Your Rating:

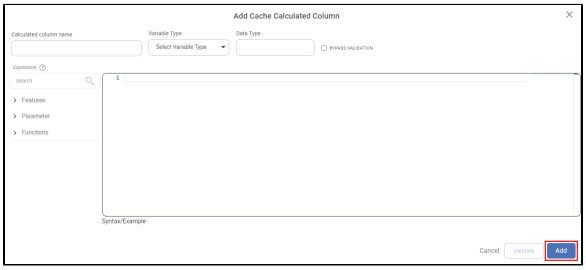
Add Cache Calculated Column

Rubiscape allows you to create a Cache Calculated Column in the dashboard. It has similar functionality as the Calculated Column. While creating a Cache Calculated Column, a cache file is generated. After every update in the source file or calculated column, this cache file will get updated.
To add a Cache Calculated Column, follow the steps given below:

1. Open the Dashboard in edit mode. Refer to *Editing a Dashboard*.
   The dashboard is displayed.
2. Add a dataset to the dashboard. Refer to *Adding Dataset in RubiSight*.
3. In the **DATA pane**, **click** the **ellipsis** corresponding to the dataset and **click** "**Add Cache Calculated Column**".



4. Add Cache Calculated Column screen is shown.
5. **Enter** the **Calculated Column Name**.
6. **Select** the **Variable Type** from the drop-down. This step is optional. If you do not select the variable type, the system defines it with the click of Validate.
7. In the Expression Code Editor window, enter the desired expression.
8. Once the expression is ready, validate the expression. **Click Validate**.
9. To add the new cache calculated column, **Click Add**.



The new cache calculated column is added to the dashboard and is displayed in the list with a  symbol.

Notes

- If you select the "Disable Cache" option while creating the dataset, the "Add Cache Calculated Column" option will not be available in the dashboard.
- If you select the "Enable Direct Query" option, the "Add Cached Calculated Column" option will not be available for the respective dataset in the dashboard.
- If you "Enable Direct Query" for the dataset in the dashboard or choose the "Disable Cache" option, any previously created "Cached Calculated Column" will function as a regular calculated column.
- Whenever you make changes to the dataset, remember to refresh the dashboard so that the "Cache Calculated Column" gets updated accordingly.
- The "Cache Calculated Column" will be updated once you use the "Refresh Cache" node in your workflow for the relevant dataset.

Your Rating:

Performing Widget Tasks

Once the chart is plotted, you can perform various tasks on the widget depending on your requirements. You can,

- Apply global, page, and widget filters to view the specific dimensions and measures in the chart
- Format the widget to change the visual effect of the chart
- Sort the data (*using the Advance Sort option*)
- Add a widget to the 'At a Glance' view
- Export the chart and the data in various forms
- Change the widget sequence on the dashboard page

The following sections explain these activities in detail.

Your Rating:

Using Filters

When you plot a chart, all the data in the dataset is not required to be used. Also, within the data used, there might be sub-categories that you want to plot separately. You can view classified results in the charts using filters. Filters help you create a precise chart view containing only the required parameters and filter out the unwanted parameters.

In RubiSight, you can make changes to

- one widget on a Dashboard page
- all widgets on the Dashboard page, or
- all the widgets on all pages of the entire Dashboard.

You can also highlight a particular feature value on a widget.

You can apply any of the following filters on the chart.

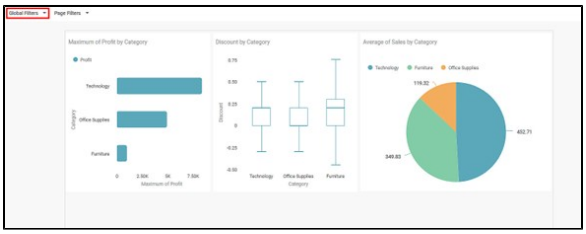
- Global Filters
- Widget Filters
- Interactivity Filters
- Page Filters

Your Rating:

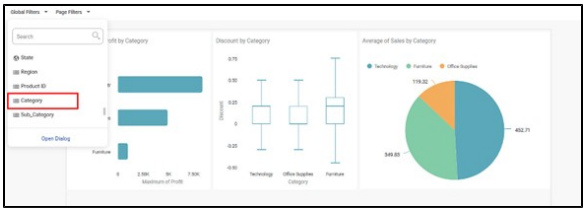
Global Filter

Global filters are always available whenever we plot charts in a dashboard. Global filters are applied to all the charts in a given dashboard.
This feature is especially useful when more than one dataset is used in the dashboard, and there are common columns across the datasets on which filters need to be applied.
To apply global filters, follow the steps given below.

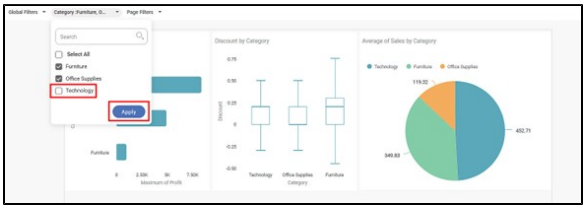
1. Create the number of charts as required. Refer to Creating Charts using Widgets.
   For example, here, we have created three charts on the dashboard canvas. All the charts contain the dimension 'Category' in them. The three categories are *Technology*, *Office Supplies* and *Furniture*.
2. In the top left corner of the dashboard canvas, click **Global Filter**.



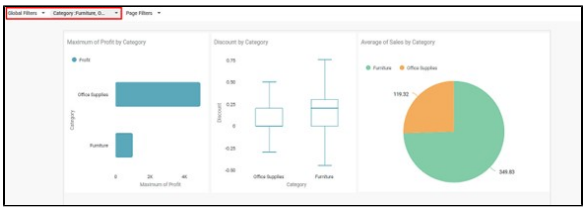
3. From the list of data fields, click the data field you want to use as a filter.
   Here we are filtering by *Category*.



   The *Category* field is added.
4. Click the added *Category* field and select the check boxes corresponding to the fields you want to filter.
5. Click **Apply**.



   For example, for the charts above, we have selected only *Office Supplies* and *Furniture*.
   The filter is globally applied to all three charts, and the charts are filtered according to the selected fields.



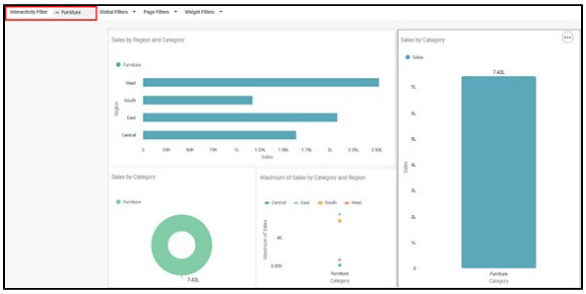
Your Rating:

Interactivity Filter

An interactivity filter is functionality that shows the auto-responsiveness of the chart in the view mode. Using an interactivity filter, you can drill down the information given by the chart to the minute details.
Interactivity is always applied on the Dimensions.
To use the interactivity filter, follow the steps given below.

1. Follow Steps 1 to Step 3 of *Viewing a Dashboard*.
   The dashboard is displayed in view mode.

2. Select the widget on which you want to apply the Interactivity Filter.
3. From the chart, click the column name on which you want to apply the filter.
   For example, here, we apply the Interactivity filter on Category – *Furniture*.



   The interactivity filter is applied to all the charts in which the selected column is present.

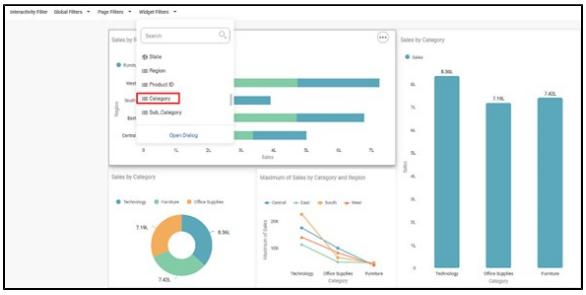
Your Rating:

Widget Filter

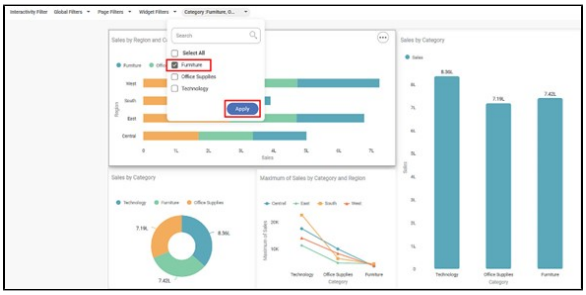
Widget filters are activated when we click on a particular widget; that is, they are applied only to the selected widget.
To apply widget filters, follow the steps given below.

1. Create the number of charts as required. Refer to Creating Charts using Widgets.
   For example, here, we have created four charts on the dashboard canvas. All the charts contain the dimension 'Category' in them. The three categories are *Technology*, *Office Supplies* and *Furniture*.
2. Click the chart to which you want to apply the widget filter. It gets selected.
   For example, here, we have selected the first chart (Stacked Bar Chart).
3. In the top left corner of the dashboard canvas, click **Widgets Filter**.

4. From the list of data fields, click the data field you want to use as a filter.
   Here we are filtering by *Category*.



5. Click the added *Category* field, select the check boxes corresponding to the fields you want to filter, and then click **Apply**.
   For example, for the first chart, we select only *Furniture*.



   The filter is applied only to the selected chart (in this case, the stacked bar chart), and the chart is filtered according to the selected fields. The other three charts remain the same.

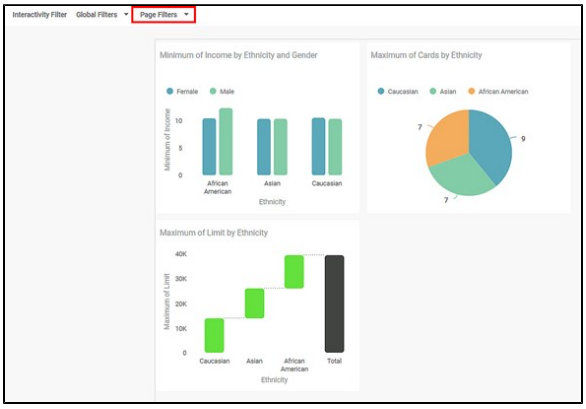
Your Rating:

Page Filter

The *Page Filter* option is always available on the filter pane of the Dashboard canvas. The page filters apply to all the charts plotted on a page of the Dashboard.

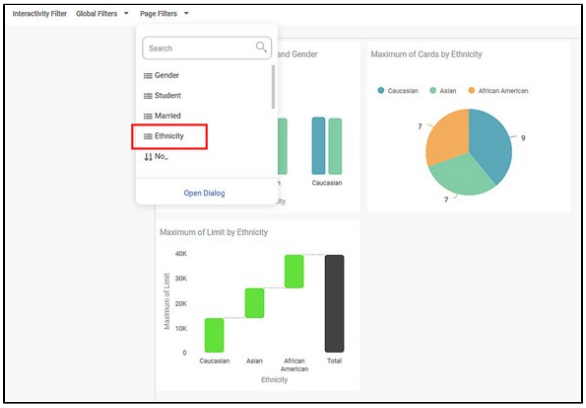
To apply a Page Filter, follow the steps given below.

1. Create the number of charts as required. Refer to Creating Charts using Widgets.
   For example, here, we have created three charts on a page of the Dashboard canvas. All the charts contain the dimension *Ethnicity* in them. The three field values in the dimension are *Caucasian, African American,* and *Asian*.
2. In the top filter pane of the Dashboard canvas, click **Page Filters**.



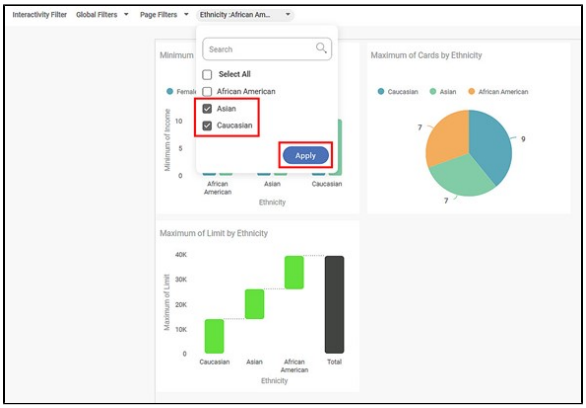
3. From the list of data fields, click the data field you want to use as a filter.

   Here we are filtering by *Ethnicity*.

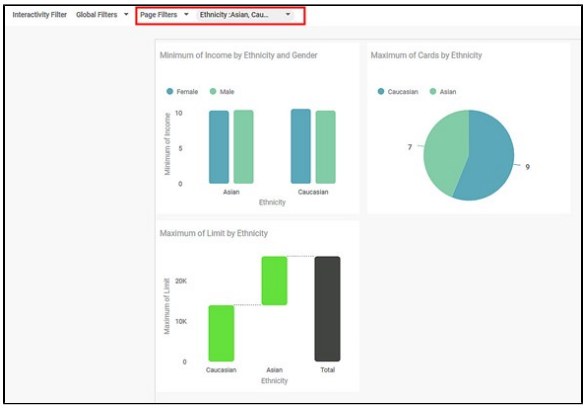


   The *Ethnicity* field is added.
4. Click the added *Ethnicity* field and select the checkboxes corresponding to the data field values you want to filter.
5. Click **Apply**.

   For example, for the charts above, we have selected *Asian* and *Caucasian*.



6. The filter is applied to all three charts, and the charts are filtered according to the selected data field values.



Notes:

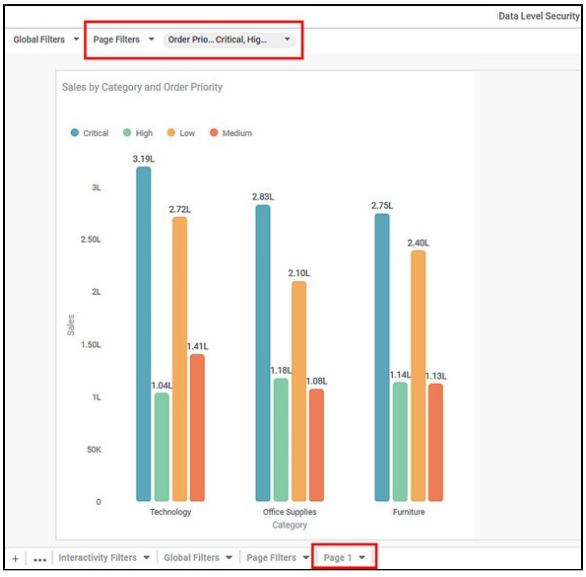
- You can apply *Page Filters* in *Edit Mode* as well as *View Mode*.
- *Page Filters* applied on one page have no impact on the widgets plotted on other pages of the Dashboard.
- If multiple filters are applied, the widgets respond to all filters accordingly. In case of contradictory filters, the widgets display the message *No Data Found.*
- Plot multiple widgets on a dashboard page using two datasets that contain at least one common feature. If you apply a page filter selecting the common feature to alter the widget view, the filter is applied to all the widgets in which the selected feature is used.

Page Filter - Further Options

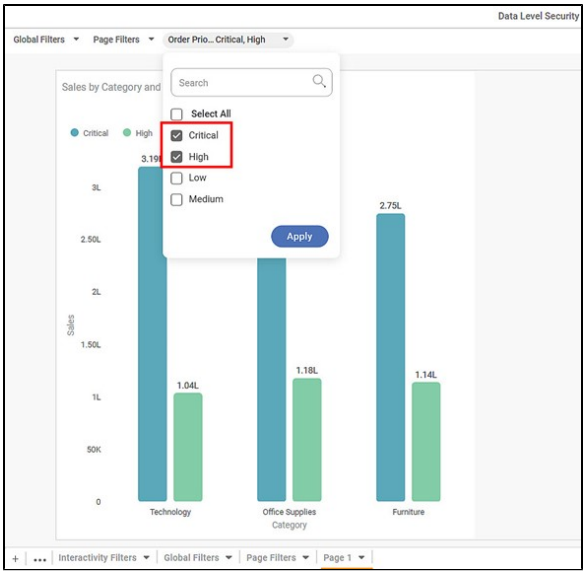
If you apply Page Filter to a Dashboard page and copy a widget on that page to a new page, the effect of the newly applied filter applied is different according to the following possibilities.

1. If you apply a Page Filter on a new page and then copy a filtered widget to this page, new filters get applied to the widget (irrespective of the originally applied filters).

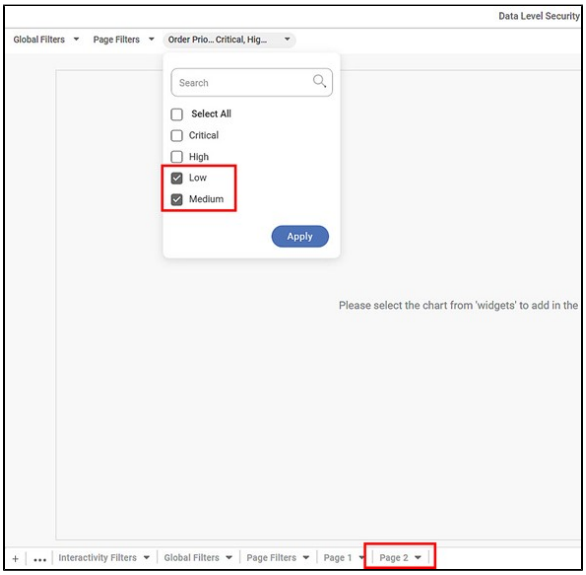
   For example, plot a *Column Chart* of *Sales* by *Category* on Page 1.
   Order Priority is selected as the *Legend* dimension. The four order priorities are *Critical, High, Low,* and *Medium.*



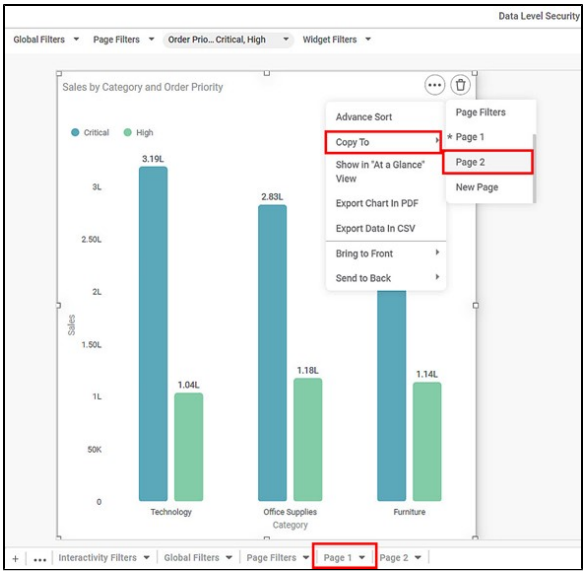
   Apply Page Filter by retaining Critical and High while removing L and M.
   The resultant filtered widget is shown below.



Now, add Page 2. Select and apply a Page Filter to the same feature Order Priority. In the example, Low and Medium are selected, while Critical and High are removed.

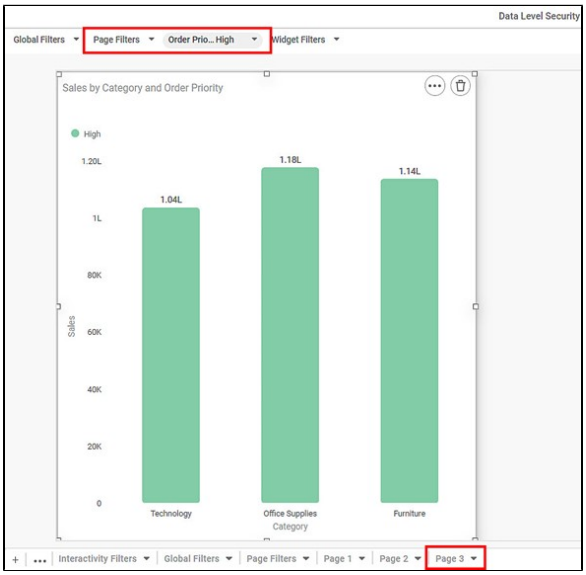


Next, navigate back to Page 1 and copy the widget to Page 2.

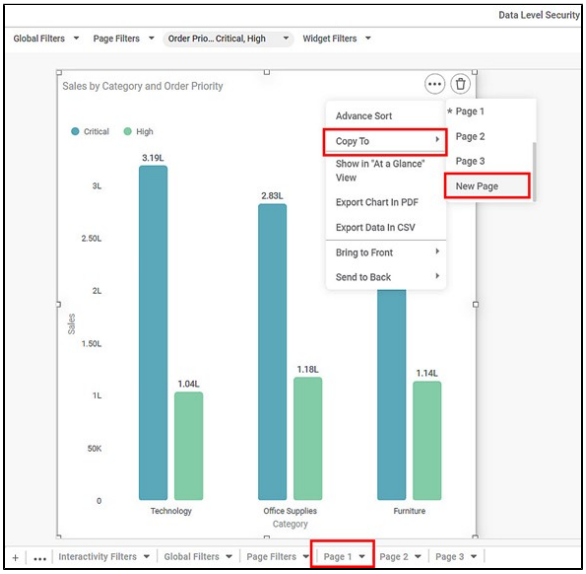


You see that the widget contains the Page Filter selected for Page 2, and the original filters from Page 1 are discarded.

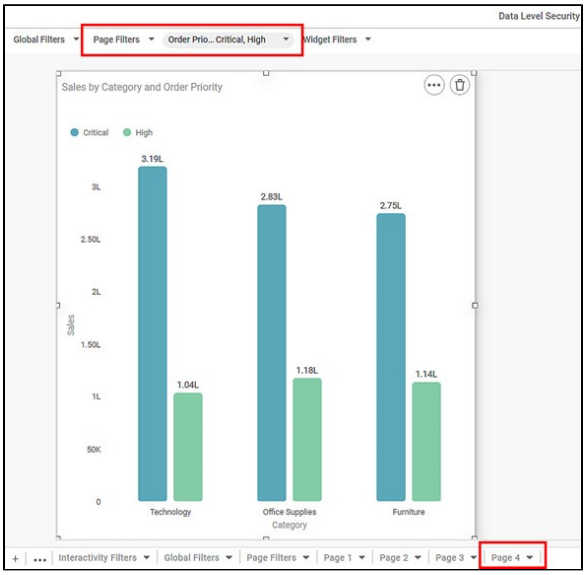
Similarly, on the new page, we apply a filter by selecting only H and discarding C. The new widget contains data for H alone.



If you copy a filtered widget to a new page, it gets copied along with the filters.
For example, we copy the filtered Column Chart to a *New Page*. In this case, a new page is added, and the widget is copied.



On the *Page 4*, you see that the widget contains the original Page Filter applied from *Page 1*.



Your Rating:

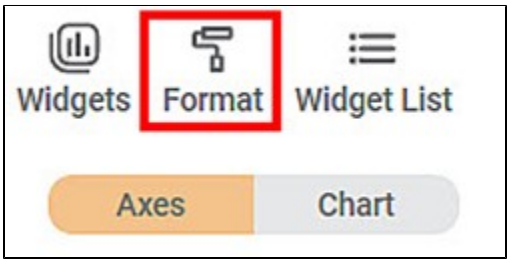
Formatting a Widget

Formatting a widget helps you make necessary changes in the charts and add or remove certain elements. It is changing the look and feel of the chart created. You can format several different elements in a widget. Depending on the type of widget selected, the available formatting options are;

- Axis— for bar-type charts
- Chart— for charts such as pie, donut, funnel, and so on that does not have axes
- Table— for table type charts

To format a widget, follow the steps given below.

1. Create the number of charts as required. Refer to Creating Charts using Widgets.
2. Select the widget that you want to format.
3. In the **WIDGET** pane, click **FORMAT**. Formatting options corresponding to the selected type of widget are displayed.



Your Rating:

Basics of Formatting

Here are some important aspects you should know to format your widget.

- The formatting options displayed depend upon the type of widget selected.
- Click the **toggle** button () to enable formatting for that element.

	• Formatting is enabled for the element
	Formatting is disabled for the element

- Click the **drop-down** button () to open the formatting options for the element.

	• The formatting options are hidden
	• The formatting options are visible

- Click **Reset to default**, present in each formatting field to reset the formatting attributes to default values.

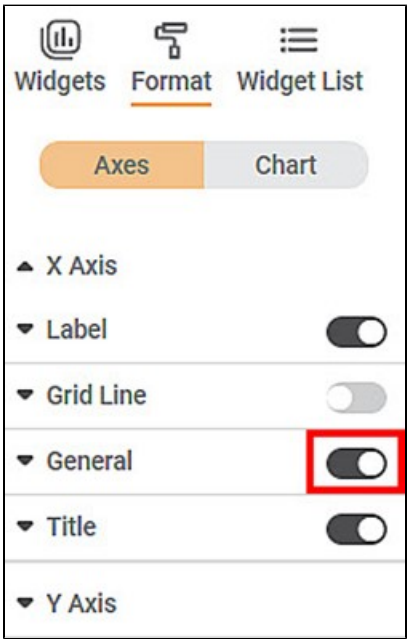
Your Rating:

Formatting the Axis

You can format the axes for charts that contain any one or both of the two axes, that is, the X-axis and Y-axis. It is possible only in charts where we have axial variables.
To format the axis, follow the steps given below.

1. Create the number of charts as required. Refer to Creating Charts using Widgets.
2. Select the widget that you want to format.
3. In the **WIDGET** pane, click **FORMAT**.
   Depending on the selected type of widget, the formatting options are displayed.
4. Click **Axis**.

5. Click the axis that you want to format.
   For example, here, we consider **X**-**Axis**.
   The formatting options for the *X-Axis* are displayed.
6. To enable and format a field, turn the corresponding **toggle** button ON ( ).
   For example, here, we have enabled the *General* field.



7. Click **General**. All the formatting options within the *General* field are displayed.

   You can change,

   - Width of the axis
   - Color of the axis
   - Minimum Column / Bar Width

Similarly, for **Axis**, you can format other fields like *Axis Label*, *Axis Title,* and *Grid Lines* to format the axis as required.

Notes:	• The dates always appear in the standard ISO format. • For Date time Formatting in RubiSight, refer to Date and Time Formatting on Chart. • For more Axis formatting options, please refer to RubiSight Widget Reference Guide.

Your Rating:

Date and Time Formatting on Chart

In RubiSight, when you plot a chart using the Date and Time formatting feature, the coordinates of the plot appear in the standard ISO format, by default, as given below.

Format: YYYY-MM-DD HH:MM:SS

Where,

YYYY-MM-DD is the date components of the coordinate

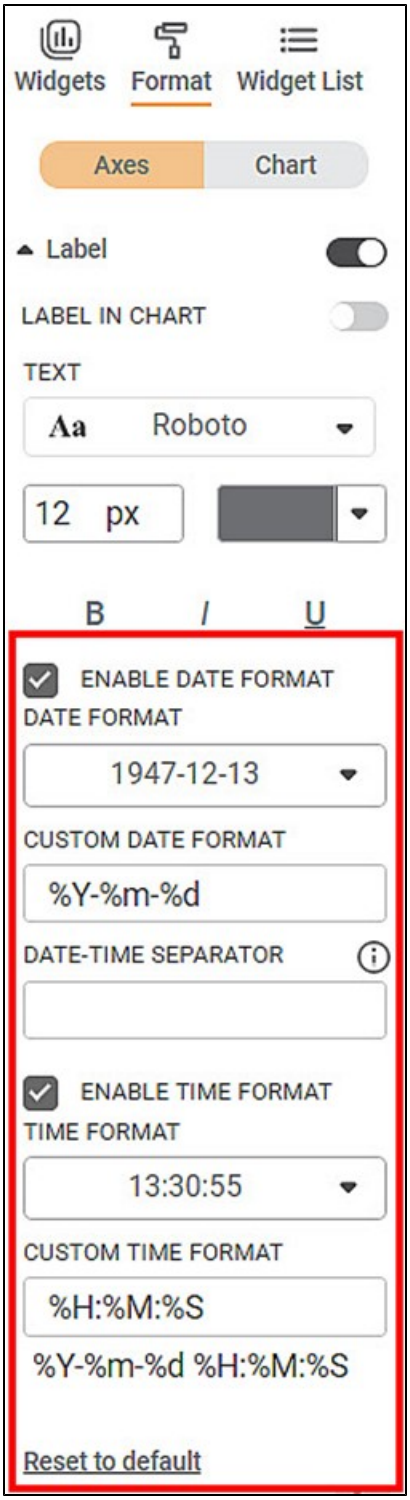
HH:MM:SS is the time component of the coordinate

For example, 2021-11-23 13:30:57.

Notes:

- If the feature contains only date values, the coordinates are displayed in the widget with time format as 00:00:00.
  - For example, 2020-12-31 00:00:00.
- If the feature contains only time values, the coordinates are displayed in the widget with the date format as 1900-01-01.
  - For example, 1900-01-01 13:34:59.
- If the feature contains both date and time values, both values are displayed in the coordinates in the widget.
  - For example, 2020-12-31 13:34:59.

You can customize the date and time components using the *Label* formatting options present under *Formats* in the Widget Pane.



The different fields present on the Date and Time Formatting options under *Label* are given below.

Field	Description	Remark
Enable Date Format	The checkbox allows you to enable/disable the *Date Format*.	• *Enable Date Format* check box is selected by default. • If the checkbox is cleared, *Date Format* is disabled, and the date components are not displayed in the coordinates in the plotted widget.
		—

DATE FORMAT	The drop-down allows you to select the *Date* format from the system-defined formats.	
CUSTOM DATE FORMAT	It displays the *Date* format using directives and an interval designator for customized configuration.	—
DATE-TIME SEPARATOR	It allows you to enter a separator to split the *Date Format* and *Time Format*. It also allows you to enter the separator *T* if your feature uses the ISO standard date and time format (YYYY-MM-DD HH:MM:SS).	• The coordinates are always displayed in standard ISO format, with default values for the Date and Time components not present. • Rubiscape supports only the following separators: Space ( ), Solidus (/), Hyphen (-), and Dot (.) • Space ( ) separator is the default separator. • Before adding any other separator, you should clear the checkbox corresponding to the space separator.
Enable Time Format	The check box allows you to enable/disable *Time Format*.	• *Enable Time Format* check box is selected by default. • If the checkbox is cleared, *Time Format* is disabled, and the time components are not displayed in the coordinates in the plotted widget.
TIME FORMAT	The drop-down allows you to select the *Time* format from the system-defined formats.	—
CUSTOM TIME FORMAT	It displays the time format using directives and an interval designator for customized configuration.	—
Format String	It displays the date/time format or data and time format and the separator, using directives and interval designator for customized configuration.	• It is of type *String*. • The format corresponds to the date/time format or data and time format displayed in *Date Format* or/and *Time Format*.

Notes :

- When both the *Enable Date Format* and *Enable Time Format* check boxes are selected by default, the values in the detected feature are in *DateTime* format.
- For system-defined date/time format(s), refer to *Table: System Defined Date and Time Formats in Rubiscape*.
- To configure customized date and time formats, refer to *Table: Customized Formats for Date and Time*.
- The complete format string containing the Date and Time components and the separator is displayed below the Custom Time Format field.
- %Y-%m-%d %H:%M:%S is the default format string displayed in RubiSight.

The different system-defined Date and Time Formats in Rubiscape are given below.

Date Formats			
1947-12-13	12-13-1947	12-13-47	12.13.1947
12.13.47	12/13/1947	12/13/47	13-12-1947
13-12-47	13-Dec-1947	13-Dec-47	13-December-1947
13-December-47	13.12.1947	13.12.47	13.Dec.1947
13.Dec.47	13.December.1947	13.December.47	13/12/1947
13/12/47	13/Dec/1947	13/Dec/47	13/December/1947
13/December/47	1947-13-12	1947-13-Dec	1947-13-December
1947-Dec-13	1947-December-13	1947.12.13	1947.13.12
1947.13.Dec	1947.13.December	1947.Dec.13	1947.December.13
1947/12/13	1947/13/12	1947/13/Dec	1947/13/December
1947/Dec/13	1947/December/13	47-12-13	47-13-12
47-13-Dec	47-13-December	47-Dec-13	47-December-13
47.12.13	47.13.12	47.13.Dec	47.13.December
47.Dec.13	47.December.13	47/12/13	47/13/12
47/13/Dec	47/13/December	47/Dec/13	47/December/13
Dec-13-1947	Dec-13-47	Dec.13.1947	Dec.13.47

Dec/13/1947	Dec/13/47	December-13-1947	December-13-47
December.13.1947	December.13.47	December/13/1947	December/13/47
Time Formats			
13:30:55	01:30 PM	01:30:55 PM	13:30

The different customized formats for Date and Time are given below.

Directive	Explanation	Example
%a	Abbreviated weekday name	Sun, Mon, ..., Sat
%A	Full weekday name	Sunday, Monday, ..., Saturday
%w	Weekday as a decimal number	0, 1, ..., 6
%d	Day of the month as a zero-padded decimal	01, 02, ..., 31
%-d	Day of the month as a decimal number	1, 2, ..., 30
%b	Abbreviated month name	Jan, Feb, ..., Dec
%B	Full month name	January, February, ..., December
%m	Month as a zero-padded decimal number	01, 02, ..., 12
%-m	Month as a decimal number	1, 2, ..., 12
%y	Year without century as a zero-padded decimal number	00, 01, ..., 99
%-y	Year without century as a decimal number.	0, 1, ..., 99
%Y	Year with century as a decimal number.	2013, 2019, 2021, ...
%H	Hour (24-hour clock) as a zero-padded decimal number	00, 01, ..., 23
%-H	Hour (24-hour clock) as a decimal number	0, 1, ..., 23
%I	Hour (12-hour clock) as a zero-padded decimal number	01, 02, ..., 12
%-I	Hour (12-hour clock) as a decimal number	1, 2, ... 12
%p	Locale’s AM or PM.	AM, PM
%M	Minute as a zero-padded decimal number	00, 01, ..., 59
%-M	Minute as a decimal number	0, 1, ..., 59
%S	Second as a zero-padded decimal number	00, 01, ..., 59
%-S	Second as a decimal number	0, 1, ..., 59
%f	Microsecond as a decimal number, zero-padded on the left	000000 to 999999
%z	UTC offset in the form +HHMM or -HHMM	+0530, -0530, ...
%Z	Time zone name (abbreviation)	CST, IST, ...
%j	Day of the year as a zero-padded decimal number	001, 002, ..., 366
%-j	Day of the year as a decimal number	1, 2, ..., 366
%U	Week number of the year (Sunday as the first day of the week). All days in a new year preceding the first Sunday are considered to be in week 0.	00, 01, ..., 53
%W	Week number of the year (Monday as the first day of the week). All days in a new year preceding the first Monday are considered to be in week 0.	00, 01, ..., 53
%c	Locale’s appropriate date and time representation	Mon Sep 30 07:06:05 2013
%x	Locale’s appropriate date representation	09/30/13
%X	Locale’s appropriate time representation	7:06:05

To use *Date and Time* formatting options on the chart, first plot a Column Chart using the dimensions and measures from the dataset. Refer to *Figure: Date & Time Formatting Options under Label* for date and time formats in the *Label* formatting options.

For example, we plot a Column Chart of the *Average of Sales (on the Y-axis)* against *Ship Date (on the X-axis)*. The *Ship Date* feature contains only the date values.

The *Region* of the sample is the *Legend* dimension.

The figure given below shows an original image of the Column Chart. By default,

- The X-axis displays the date and time coordinates in the standard ISO format.
- The date values are displayed in YYYY-MM-DD format.
- The coordinates are displayed with time format as 00:00:00. For example, 2018-01-05T00:00:00

Scenario 1:

Now,

- Clear the *Enable Time Format* checkbox.
- Keep all other formatting options unchanged.

The resultant widget is shown below.

The X-axis displays only the date components of the values in YYYY-MM-DD format - for example, 2018-01-05.

Scenario 2:

Now,

- Keep the selection of both the *Enable Date Format and Enable Time Format* checkboxes unchanged.
- Change the CUSTOM DATE FORMAT and CUSTOM TIME FORMAT as required. For example, the *Date Format* is changed to %m-%d, and the *Time Format* is changed to %H:%M.

The resultant widget is shown below.

The X-axis displays the date components of the values in MM-DD format and the time format as 00:00. For example, 12:28 00:00.

Your Rating:

- The different fields present on the Date and Time Formatting options under Label are given below.
- The different system-defined Date and Time Formats in Rubiscape are given below.

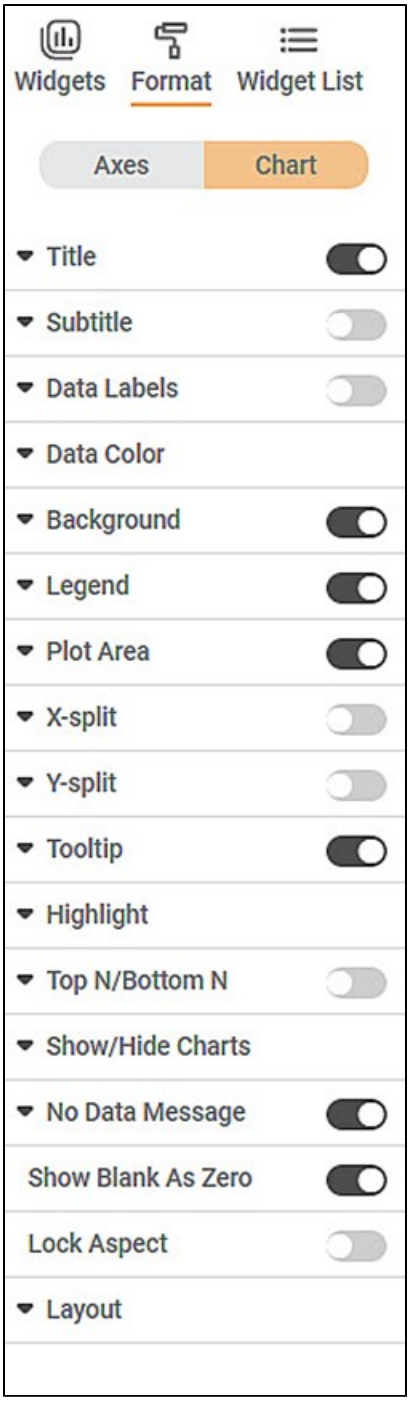
Formatting a Chart

This formatting is applicable for widgets that do not have axes. For example, chart formatting is possible for widgets such as Pie Chart and Donut Chart.
To format the chart, follow the steps given below.

- Create the number of charts as required. Refer to Creating Charts using Widgets.
- Select the widget that you want to format.
- In the **WIDGET** pane, click **FORMAT**.
  Depending on the selected type of widget, the formatting options are displayed.
- Click **Chart**.

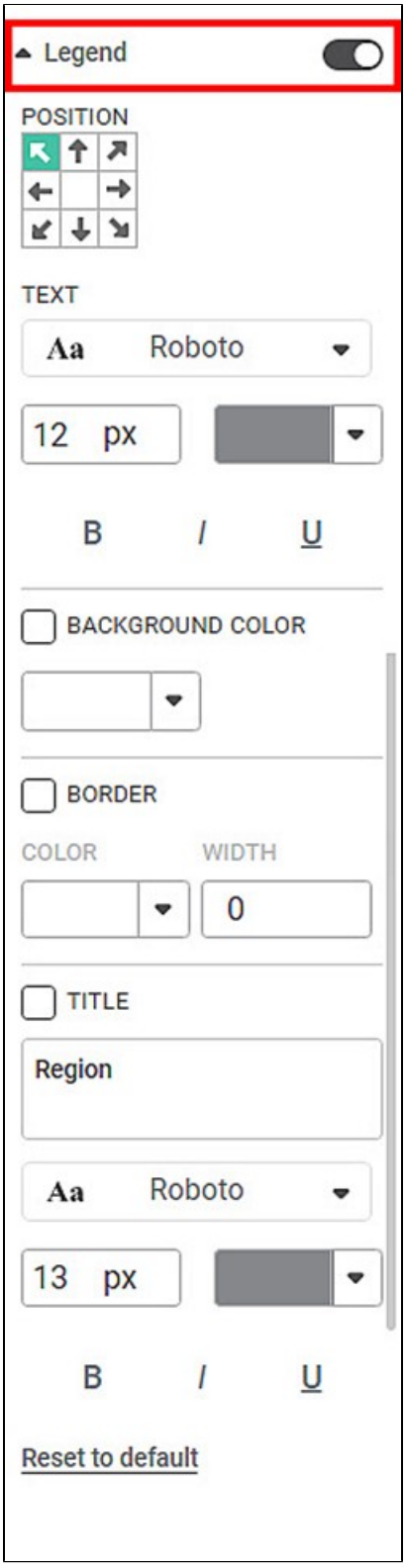
The formatting options for *Chart* are displayed.

- To enable and format a field, turn the corresponding **toggle** button ON ( ).
  For example, here, we have enabled the *Legend* field.



- Click **Legend**.
  All the formatting options within the *Legend* field are displayed. You can change,
- Position of the legend on the chart
- Text of the legend and its font settings
- Background color of the legend
- Border of the legend
- Border color and border width of the legend
- Title of the legend and its font settings

  You can also reset all settings to default and undo all changes made to the widget.



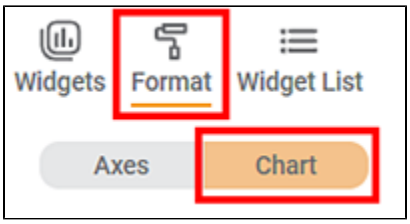
Similarly, for **Chart**, you can format other fields like *Plot Area, Tooltip, Data Labels, Data Color, Title, Subtitle, Background, No Data Message, Layout, Top N/Bottom N, and Lock Aspect* to format the chart as required.
For more Chart formatting options, please refer to RubiSight Widget Reference Guide.

Your Rating:

Interactivity Control

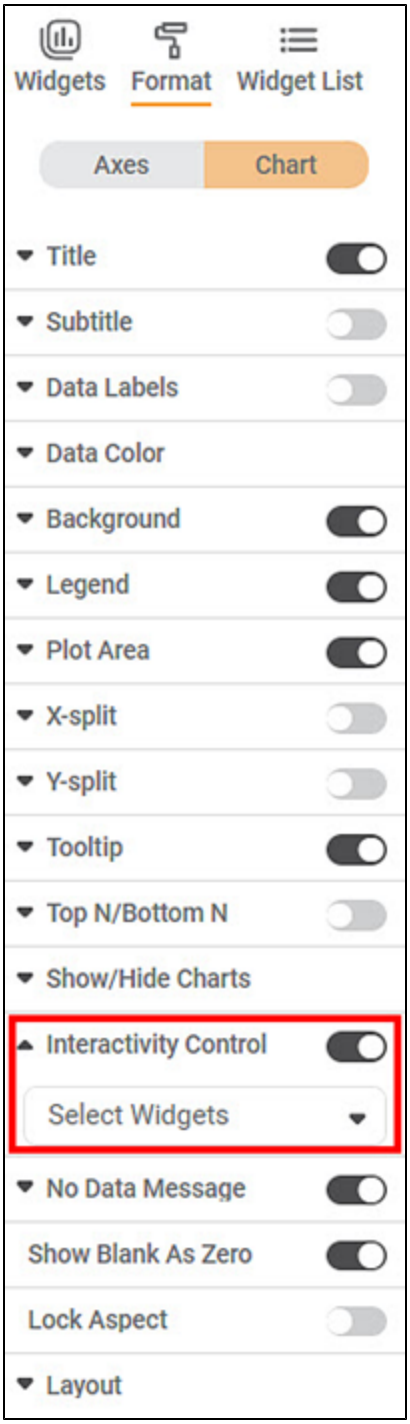
Interactivity is functionality that shows the auto-responsiveness of the chart in the view mode. We always apply interactivity to the dimensions. Using an interactivity control, you can turn interactivity ON or OFF for the preferred chart(s) that exists on the dashboard.
To use interactivity control, follow the steps given below,

1. Create the number of charts as required. Refer to Creating Chart Using Widgets.
2. Select any widget on the dashboard canvas.
3. In the **Widget pane**, click **Format**.
4. Click **Chart**.



The formatting options for the chart are displayed.

5. To turn interactivity ON or OFF, you can use the toggle button. By default, the interactivity control is ON ( ).



6. **Click** the **interactivity control drop-down** menu. The "Select Widget" button will be displayed.
7. Select the select widget drop-down button. It will display a list of all the widgets present on the dashboard.
8. **Select** the desired **chart** from the list. For example, here we select Bar Chart and Pie Chart from the list.

9. Click **Save**.
10. Click **View Mode** to open the dashboard in view mode.

11. From the chart, click the column name on which you want to apply the filter. For example, here, we apply an interactivity filter on the **State** - "**F lorida**".

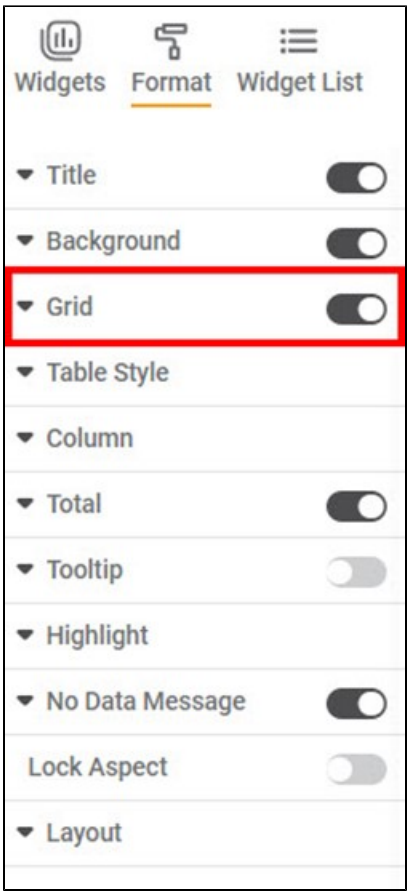
The interactivity filter applies only to the charts selected in the interactivity control's select widget list.

Your Rating:

Formatting a Table

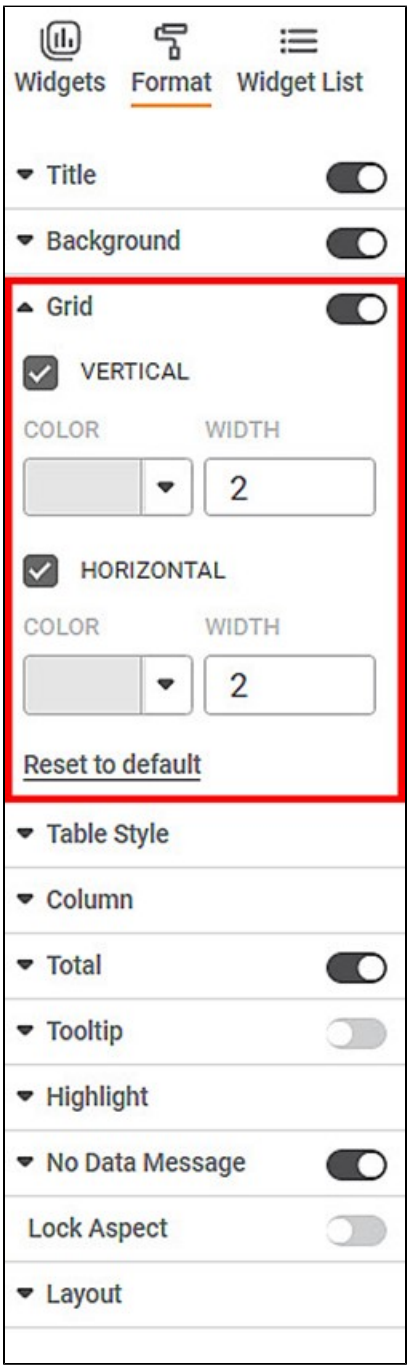
This formatting applies to widgets that contain tables. For example, table formatting is possible for widgets such as Table and Cross Table. To format the chart, follow the steps given below.

1. Create the number of charts as required. Refer to Creating Charts using Widgets.
2. Select the widget that you want to format (Table or Cross Table).
3. In the **WIDGET** pane, click **FORMAT**.
   Depending on the selected type of widget, the formatting options are displayed.
4. To enable and format a field, turn the corresponding **toggle** button ON ( ).
   For example, here, we have enabled the *Grid* field.



5. Click **Grid**.
   All the formatting options within the *Grid* field are displayed. You can change,

   - Color and width of the vertical grid lines
   - Color and width of the horizontal grid lines



Similarly, for **Grid**, you can format other fields like *Column Header, Row Header, Values, Title, Hyperlink, Sub Total, Background, No Data Message, Layout, and Lock Aspect* to format the table as required.

For more Table formatting options, please refer to RubiSight Widget Reference Guide.

Your Rating:

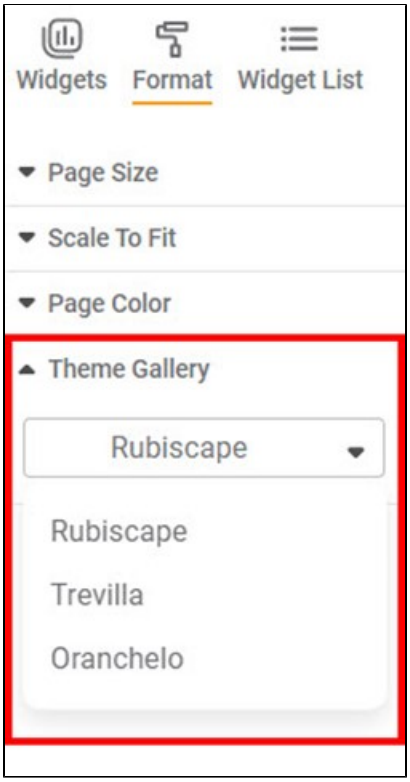
Formatting a Dashboard Page

You can also format the dashboard page on which the chart is plotted. You can change the page size and also use a different theme (color palette) for the chart.
To format the dashboard page, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard.
   The Dashboard is displayed.
2. In the *WIDGET* pane, click **FORMAT**. Make sure you have not selected any chart on the dashboard canvas.
   The *Page Size* and *Theme Gallery* fields are displayed.
3. Click **Page Size**.
   All the formatting options within the *General* field are displayed. You can change,

   - Type of page (Aspect ratio 16:9, 4:3, Letter or Custom)
   - Page width and height

Similarly, you can format the *Theme Gallery*. Theme Gallery helps you to select the color theme. It changes the look and feel of the widget.


Widgets
Format
Widget List
Page Size
Scale To Fit
Page Color
Theme Gallery
Rubiscape
Rubiscape
Trevilla
Oranchelo

Your Rating:

Layout

When you plot a widget, the widget appears on the dashboard canvas within a page with default dimensions. The width and height of the page within the boundaries of the dashboard canvas define the *Page Type*.

You can view the Page *Type* under *Page Size* on the widget formatting pane.

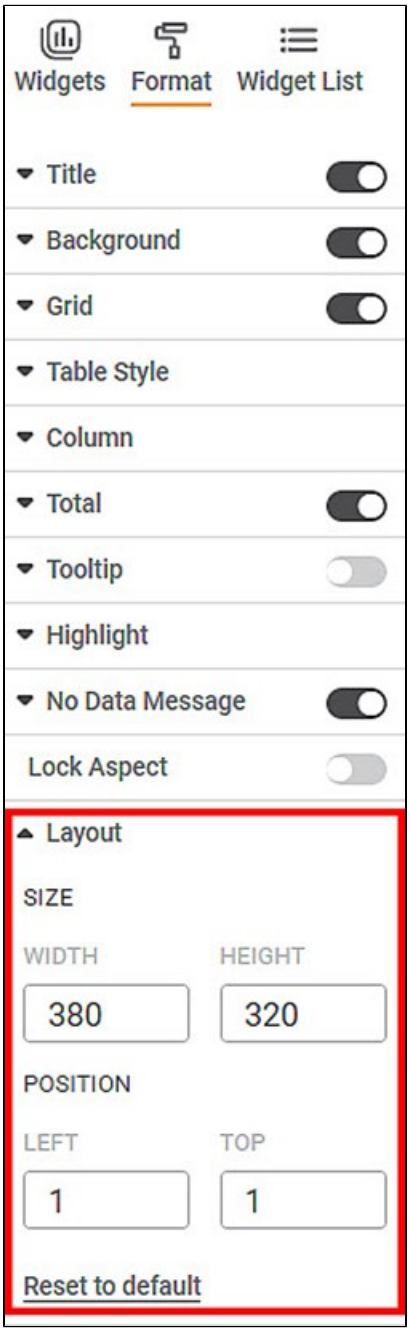
The table below describes the available Page Type options and their dimensions.

Page Type	Width (Max.)	Height (Max.)	Remark
16:9	1280	700	• This is default page type when you open a dashboard. • The page height and width cannot be altered. • You can change the widget layout only within these maximum limits.
4:3	960	720	• The page height and width cannot be altered. • You can change the widget layout only within these maximum limits.
Letter	816	1030	• The page height and width cannot be altered. • You can change the widget layout only within these maximum limits.
Custom	1284	700	• Only this page type has changeable width and height. • By default, these values are 1284 and 700, respectively. • You can change the page layout only within specific maximum limits.

When you plot a widget, its layout defines its width and height. The widget layout is smaller (in size) than that of the *Page Type* on which it is plotted.

You can change the widget layout using the *Layout* option available under *Chart* formatting options.

Note :	*Layout* option is available in all widgets.



The table given below describes different fields present on Layout formatting.

Field	Description	Remark
Width	It allows you to change the width of the widget.	• When you plot a widget, the widget is displayed in its default width. • The default width is different for different Page Types.
Height	It allows you to change the height of the widget.	• On plotting a widget, you can see its default height. • The default height is different for different Page Types.
Left	It allows you to change the distance of the widget from the left margin of the page.	• When you plot a widget, the widget appears at its default distance from the left margin of the dashboard. • The sum of the dimensions in *Layout Width* and *Left* should be <= the *Width* of the *Page Type*.

Top	It allows you to change the distance of the widget from the top margin of the page.	• When you plot a widget, the widget appears at a default distance from the top margin of the dashboard • The sum of the dimensions in *Layout Height* and *Top* should be <= the *Hei ght* of the *Page Type*.

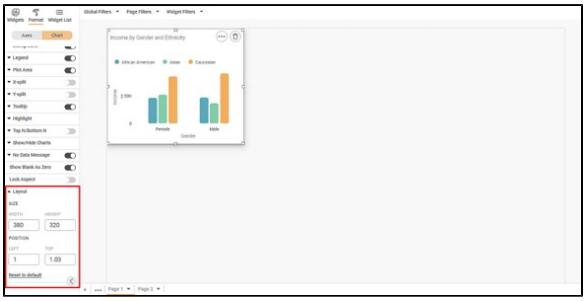
To use *Layout* formatting options, first plot any chart using the measures from the dataset.

In the figure below, we plot a *Column Chart* on a 16:9 *Page Type*.

Now, when you click the widget, the *Chart* menu is enabled.

Under *Layout*, you can see the default width and height values of the widget. You can also see its default distance from the left and top margins.

The figure below shows the default layout of the Chart.



In the figure,

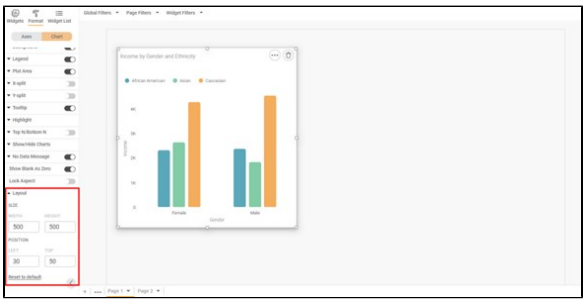
- The default position of the widget is near the top-left corner of the canvas.
- The default width and height are 380 and 320, respectively.
- The default distance from the left and top margins are 1 and 1.01, respectively.

Now, change the layout size and position.

- The *Width* and *Height* are 500 and 500, respectively.
- The *Left* and *Top* positions are 30 and 50, respectively.

Notes:	For a widget plotted on 16:9 *Type* of dashboard page, • The sum of the *Width* and distance from the *Left* margin should not be more than *1280*. • The sum of the *Height* and distance from *Top* margin should not be more than *700*. Refer to *Page Types and their Dimensions* and *Description of fields present in Layout formatting*.

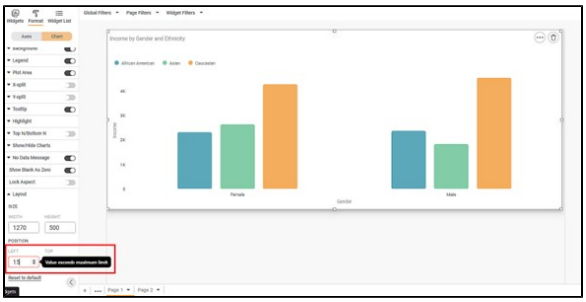
The resultant widget is shown below.



Since the sums mentioned above are within limits, the widget resizes to the newly selected dimension.

However, if the sums exceed the defined limits, the corresponding field is highlighted (red).

If you hover over the field, an error message "*Value exceeds maximum limit*" is displayed.



In the above example,

- The widget width is 1270.
- The distance of the widget from the left margin is changed to 15.

However, the sum 1270 + 15 is 1285, which is greater than the width limit (of 1280) of 16:9 *Type* of dashboard page. Hence, the *Left* field is highlighted, and an error message is displayed.

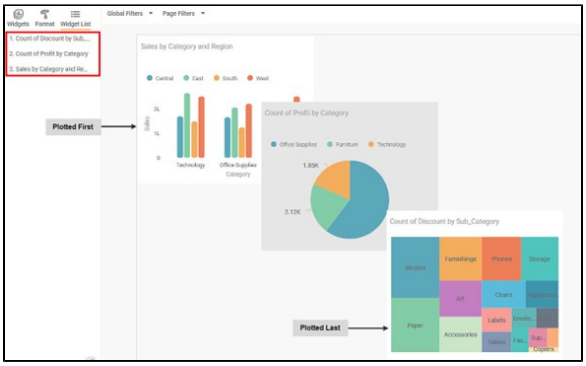
Notes:

- You can manually drag the corners and edges of the widget and change the aspect ratio as required. In this case too, the aspect ratio of the widget should not exceed the defined limits.
- Saving the new layout saves the widget at the same location where it was created.
- According to the Page *Type* selected, *Reset to default* changes the widget position and size to its default position and size on the dashboard canvas.

Your Rating:

Widget List

The *Widget List* option is present in the Widget pane, next to *Widgets* and *Format* tabs.
The *Widget List* is used to display the list of plotted widgets on a Dashboard page in a particular sequence. The last plotted widget appears first in the list, while plotted first appears last of the list.
The image below shows that the Column Chart is plotted first and is at position 3 in the Widget List, while the Treemap Chart is plotted last and hence is at position 1.



Notes:

- If the Dashboard page is blank, you see a *No Widgets Plotted* message in the *Widget List*.
- If you select a widget from the Widget pane, *the chart title placeholder appears by default*. When you configure and plot the widget, its *Title* appears in place of the *chart title*.

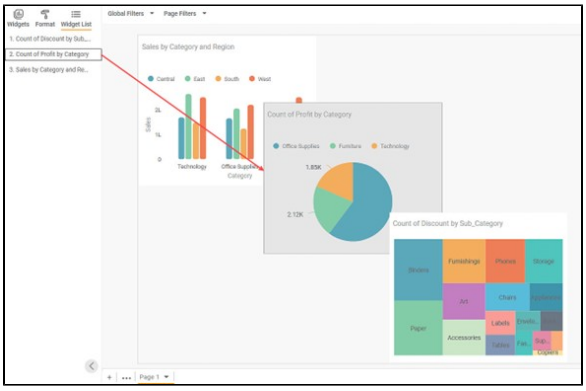
The Widget List can be used to perform the following actions.

Table of Contents

- Highlight a Widget
- Change Widget Order
- Show/Hide Widgets:

Highlight a Widget

When you click a widget title in the list, a border appears on the corresponding widget on the Dashboard.

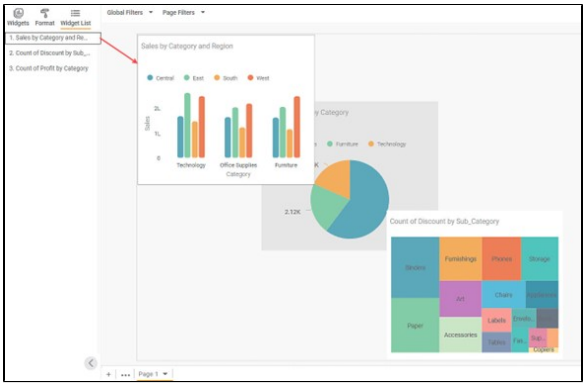


Notes:

- Highlighting a widget differentiates the selected chart from the non-selected ones visually. It is particularly required if several widgets have identical titles. In this case, we can spotlight one particular widget using this feature.

Change Widget Order

You can drag widget titles and change the order in which they appear in the list. The corresponding effect is observed on the Dashboard. It works as an alternative for the *Send to Back* and *Bring to Front* function ality present on widgets.
For example, drag the *Sales* by *Region* and *Category* to the top of the list. On the Dashboard page, it appears on top of the remaining two widgets.

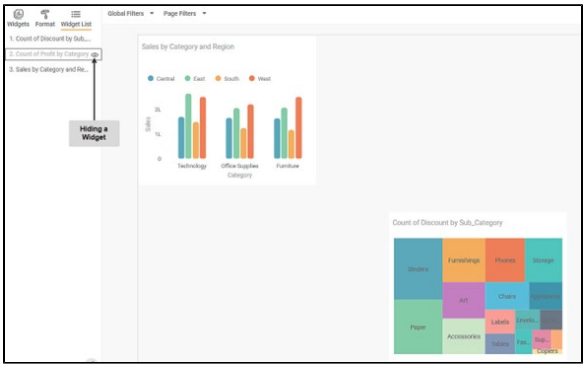


Notes:

- Even if you change the widget order, their numbering sequence remains the same.
- The widget list appears even if widgets are spread on a Dashboard page. Thus, even if the widgets are not mapped, you can determine the sequence in which they are plotted.
- In this case, the drag and move functionality does not affect the widgets since they are neither mapped nor overlapping.

Show/Hide Widgets:

You can hide a widget if it is not required to be displayed on the Dashboard for any reason. For this, hover over the widget title and click the *Hide Widget Icon* ( ). The widget gets hidden (disappears) from the Dashboard page. Also, the widget title in the list gets blurred, and a *Show Widget Icon* ( ) appears next to it.



If you want to view the widget again, click the *Show Widget Icon* Icon ( ). The widget appears in the same position.

Sorting Data in Widgets

You can sort a widget based on the variables present in the chart. The default sorting of the chart is with respect to the first categorical variable used while plotting the chart. By default, this sorting is in the *Descending* order.

For default sorting, preference is always given to a categorical variable. If no categorical variable is used to plot the widget, the first numerical variable selected to plot the widget is used for default sorting.

For charts with legend, if you select a feature as a *Legend*, the numerical variable plotted on the Y-axis is not available for sorting.

For charts without legend, the numerical variable plotted on the Y-axis is available for sorting.

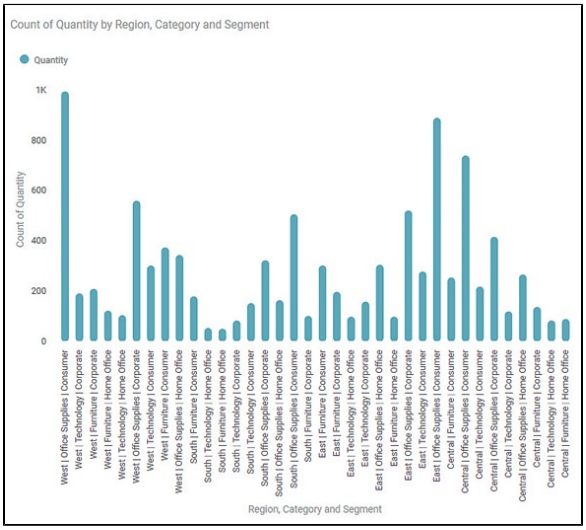
Sorting can be applied to the following charts/widgets: *Column chart, Pie chart, Area chart, Line Chart, Donut chart, Bar chart, Boxplot chart, Stacked column chart, Stacked bar chart, Stacked area chart, Table,* Cross Table, *Waterfall chart, Combination chart, and Sparkline chart*.

Advance Sort

- The sorting of data in a widget helps you to change its appearance. In Rubiscape, you can apply multi-level sorting to multiple widgets. You can
- Arrange data in ascending or descending order.
- Sort the data based on available variables
- Apply sorting to multiple variables at the same time
- Change the sequence in which sorting is applied

To apply advance sort on the data in a widget, create charts as required on the dashboard page. Refer to *Creating Charts using Widgets*.

For example, we plot a *Column Chart* for *Quantity Count* by *Region*, *Category,* and *Segment* in a *Sales* dataset.
The chart is sorted by default with respect to the *Region* variable in the *Descending* order.

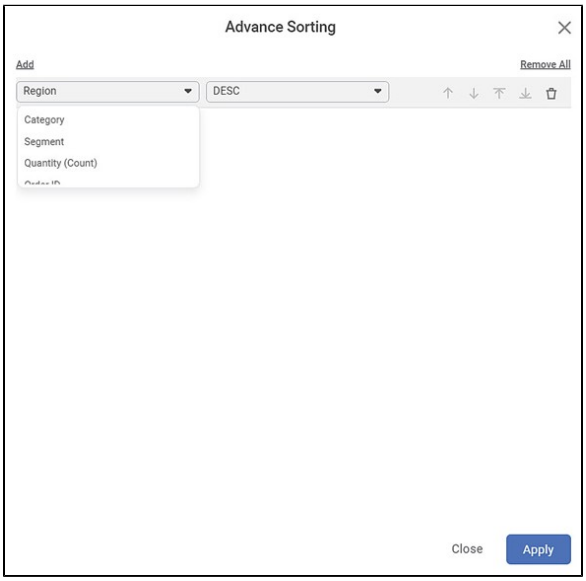


Next,

1. Select the widget, and on its top-right corner, click the **More Options** ellipsis ( ). The available options are displayed.
2. Click the **Advance Sort** option.

The *Advance Sorting* window is displayed. You observe that,

- By default, the chart is sorted in Descending order (**DESC**) with respect to the first categorical variable selected while plotting the chart. In our example, the *Column Chart* is sorted with respect to *Region*.
- On clicking the *Region* drop-down, the other variables, which can be used for sorting, are displayed.
- Since no variable is selected as *Legend*, all other variables are available to be selected for sorting. In our example, they are *Category*, *Segme nt*, and *Quantity (Count)*. Also, the Legend variable does not appear in the sorting list.



The table below describes the various fields and icons present on the *Advance Sorting* window.

Field /Icon	Variable Behavior	Description
Add	This field allows you to add a new variable/feature to the sorting list.	• One categorical variable, with sorting in the Descending order, is present by default. • It means that the chart is sorted by default with respect to the first categorical variable in the descending order. • You can add the remaining variables to the list, one variable at a time. • You can apply the following orders/sequences of sorting to the variables by clicking the order drop-down. • Ascending (*ASC*) • Descending (*DESC*) • When a variable is selected, by default, it is sorted in *Descending* order. • If you click Add and then click Apply without selecting a feature, a "*Please fill all features*" error message is displayed.
↑	The *Move Up* arrow allows you to move the variable one place up in the order.	This option is disabled for the variable present at the top of the list.
↓	The *Move Down* arrow you to move the variable one place down in the order.	This option is disabled for the variable present at the bottom of the list.
⤒	The *At Top* arrow you to move the variable to the top of the order.	This option is disabled for the variable present at the top of the list.
⤓	The *At Bottom* arrow you to move the variable to the bottom of the order.	This option is disabled for the variable present at the bottom of the list.
🗑	The *Delete* icon allows you to remove a variable from the list.	You can remove only one variable at a time using this icon.
Remove All	This option allows you to remove all variable selections from the list at the same time.	After you click *Remove All*, the default variable and selection and the specified order are retained.
Close	This option allows you to cancel the selection process and close the window.	When you click *Close*, the earlier sorting selection or default selection is retained, and you are navigated to the dashboard page.
Apply		

	This option allows you to apply the variable and order selection, in the specified order, on the widget.	When you click Apply, the Advance Sort window disappears, and you are navigated to the dashboard page.

Scenario 1:

All the variables are selected for sorting. The sequence of variables and the order of sorting for each variable are shown below.
According to the sequence, the *Column Chart is sorted* first by *Region* in the Descending order, then by *Category*, and finally by *Segment,* both in the Ascending order.

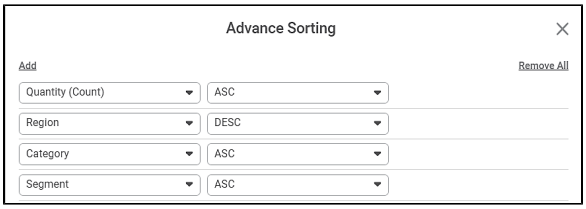
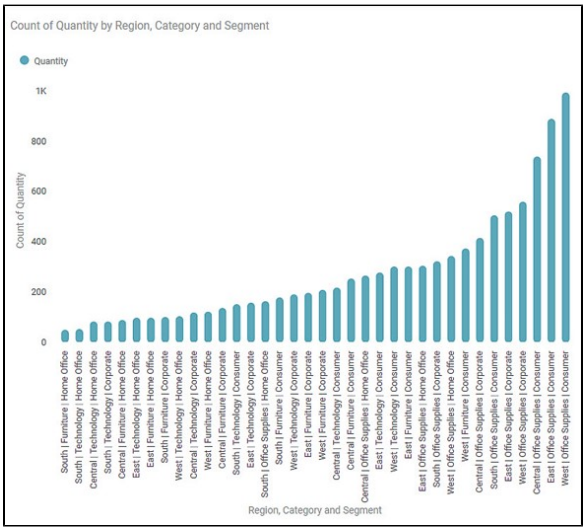


Figure: Advance Sorting Selection 1

The resultant Column Chart is shown below.



Scenario 2:

All the variables are selected for sorting. The sequence of variables and the order of sorting for each variable are shown below.
According to the sequence, the *Column Chart is sorted* first by *Category*, then by *Segment*, and finally by *Region,* all in Ascending order.

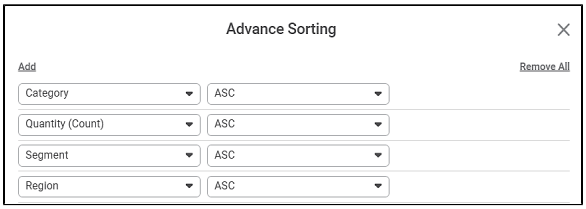
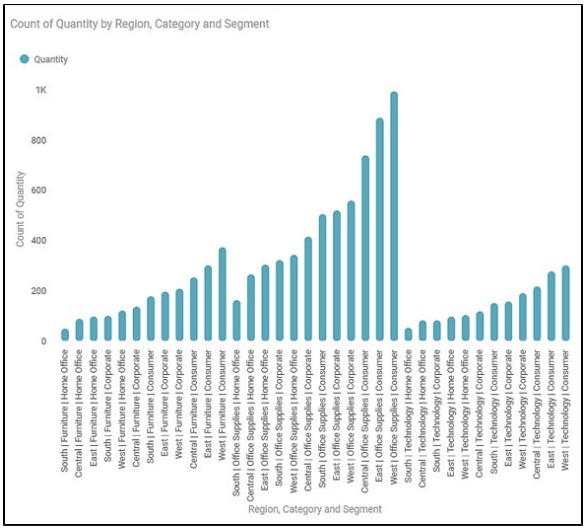


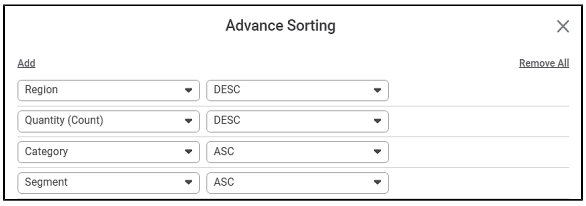
Figure: Advance Sorting Selection 2

The resultant Column Chart is shown below.

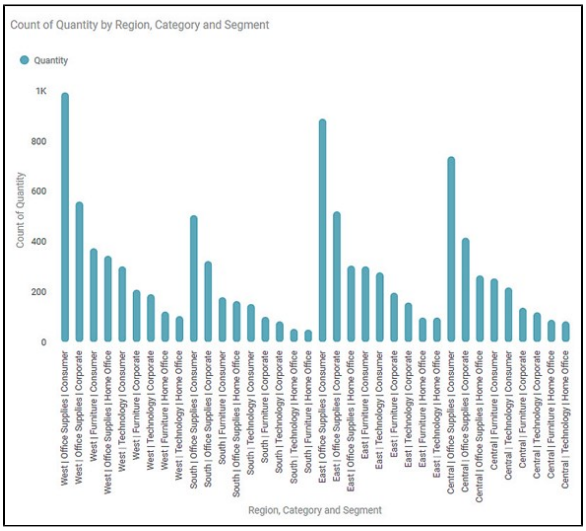


Scenario 3:

Consider that the Advance Sorting selection is as shown below.



The resultant Column Chart is shown below.



Your Rating:

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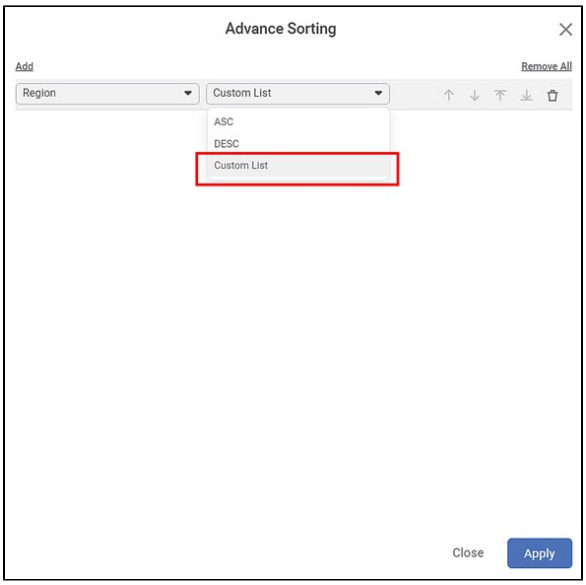
- Advance Sort

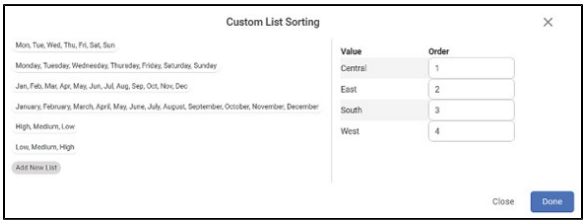
Custom Sort

To apply custom sorting to the data in a widget, the non-numerical categorical variables, the columns used as dimensions, and legends during the configuration are used. You can prepare a custom list for all such columns using the advance sort option.
To access the custom sorting option,

1. After plotting a widget, click the **More Options** ellipsis ( ) on its top-right corner.
2. From the available options, click the **Advance Sort**. The *Advance Sorting* window is displayed.
3. In the Region dropdown, select **Custom List**.



The *Custom List Sorting* page is displayed.



On the Custom List Sorting page,

- Following three system-defined custom lists are available.
  - Days of a Week (both acronyms and full names)
  - Months of a Year (both acronyms and full names)
  - Priority Values (both ascending and descending)
- You can see that the day and month values are arranged according to the calendar and not alphabetically.
- Click on any system-defined custom list to find the order of its values. It is displayed on the right side of the same page.
- In any order, one (1) has the highest order rating. For example, Monday (1) has the highest order, while Sunday (7) has the lowest.
- The order for system-defined custom lists is predefined and cannot be changed.
- Click ***Done*** to select any system-defined list.

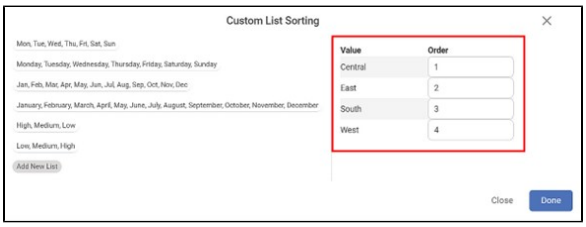
You can also create a new order for the values in a variable using the *Add New List* option. For this, the variable should

- be already used for configuring the widget
- be non-numerical and categorical
- not possess more than 50 unique values.

To create a new order,

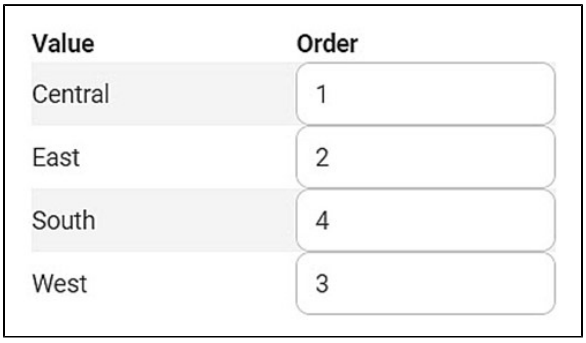
1. On the *Advance Sort* page, click Custom List from the order dropdown in front of a variable.
2. On the *Custom List Sorting* page, click **Add New List**. A list of unique values in the selected variable is displayed.

For example, the four unique values Central, East, South, and West of the Region variable are displayed below.



You can see that,

- The four unique values are arranged in alphabetical order from A to Z.
- The order numbers are editable.
- For example, you can set the order for West to 3 and South to 4 and apply the sorting. Thus, the new order becomes, *Central, East, South, and West* with orders *1, 2, 3, and 4,* respectively.

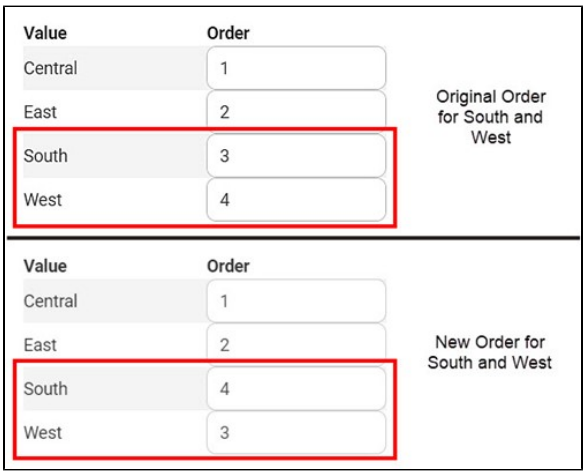


- If you insert a number greater than the number of unique values, an error message is displayed.

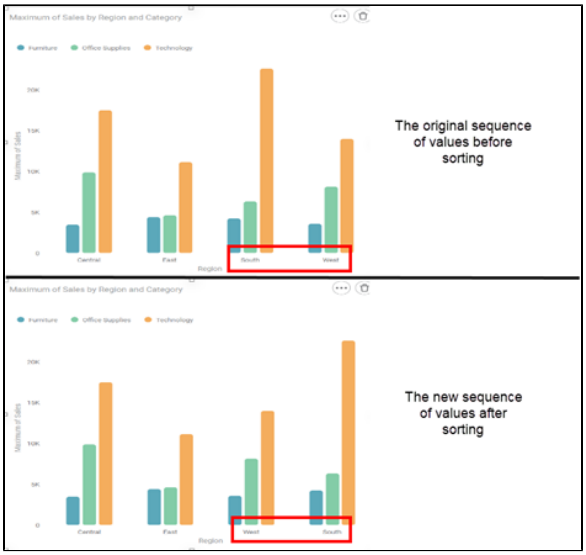
- The same order number cannot be assigned to more than one value. An error message is displayed if you insert the same number as order for two different values. In case you insert the same order number for two values, an error message 'Cannot enter duplicate order number' is displayed.
- Click ***Done*** to save the newly-defined list.

Notes:	• Changing the order is possible for the *Add New List* option and not the system-defined custom list. • The custom list option is available only for the configuration columns. These are the columns used for plotting the widget. • The custom list option is not available for the numerical columns because the number of unique values in a numerical column is generally large. • In case the list contains numerical values, there is an upper limit of 50 entries. That is, the list displays the first fifty (50) values. • Post these 50 values, an error message is shown, and only the first 50 entries are considered and displayed in the list.

Consider the order for South and West to be interchanged as shown below.



According to the newly applied sorting, the original and new widgets are shown below. Here, the sequence of the values South and West are interchanged. Accordingly, the widget also changes.



Notes:	• If there is a legend variable in the advance sorting list, you will not see any measure in the list. • Thus, if you want to sort a widget based on a measure, you need to remove the Legend from the chart.

Field-level Sorting

You can also sort the data based on other non-configured non-numerical columns in a dataset. These columns are present in the dataset but have not been used for chart plotting.
The custom list option is also disabled for such columns since they are not used in the configuration.

Note:	The non-configured numerical columns cannot be used for sorting because their values need aggregation before they can be used. However, you cannot apply aggregation directly through the Advance Sort page.

Your Rating:

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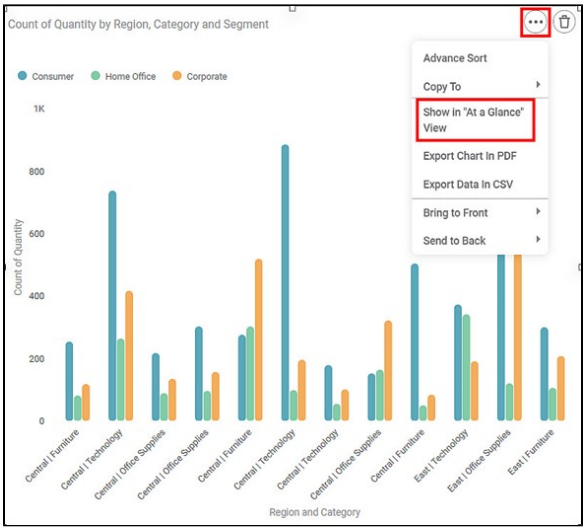
- Field-level Sorting

Adding Widget in "At a Glance" View

Adding a widget in the "At a Glance" view makes it easy for you to see the created charts directly on the home page. This feature is user login specific. The user who has added the charts in a glance view can only see those charts on the Rubiscape home page.
To add a widget in *At a Glance* view, follow the steps given below.

1. Create the number of charts as required. Refer to Creating Charts using Widgets.
2. Select the widget that you want to add in at a glance view.
3. On the top right corner of the widget, click the **More Options** ellipsis ( ). The available options are displayed.
4. Click the **Show in "At a Glance" View** option.



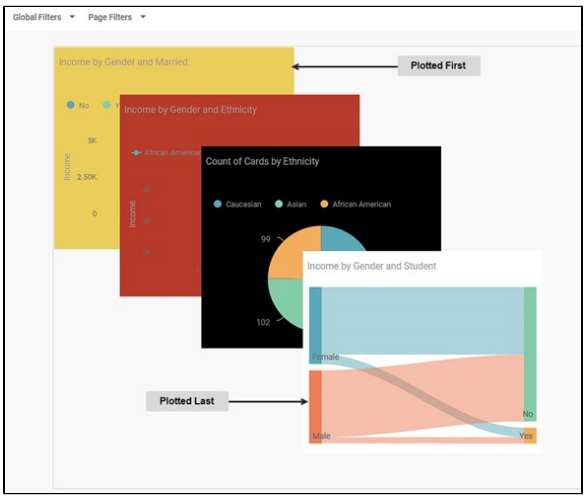
The widget is displayed in the *At a Glance* pane on the Rubiscape home page.

Your Rating:

Moving the Overlapping Widgets

When a number of widgets are plotted on a dashboard page, they overlap each other in the sequence in which they are created. Thus, the widget plotted first appears in the hindmost position (furthest back), while the chart plotted last appears in the foremost position (leading position).

For example, in the image below, the *Income by Gender and Married* widget is plotted first, while the *Income by Gender and Student* is the widget plotted last.



In RubiSight, you can change the sequence of such overlapping widgets, by moving them backward or forward. For this, there are two options on the **More Options** menu present on all the widgets. These are explained in the table below.

Table 1: Options to Change the Sequence of Overlapping Widgets

Field		Description	Remark
Bring to Front	Bring to Front	This option allows you to shift the widget at the foremost position.	—
	Bring Forward	This option allows you to shift the widget one place in the forward direction.	
Send to Back	Send to Back	This option allows you to shift the widget at the hindmost position.	—
	Send Backward	This option allows you to shift the widget one place in the backward direction.	

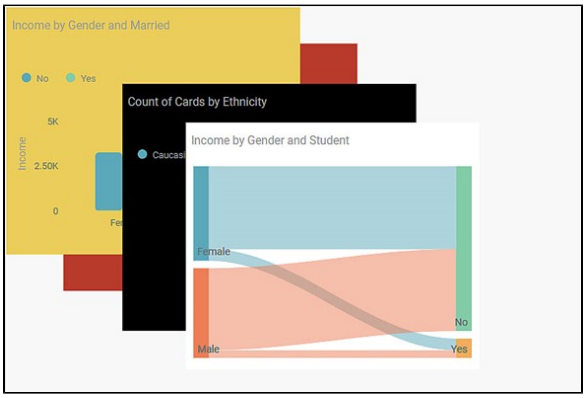
Notes:

- This option is available for the Edit Mode only.
- To see the displaced widget, click at any point in the empty space on the dashboard page.

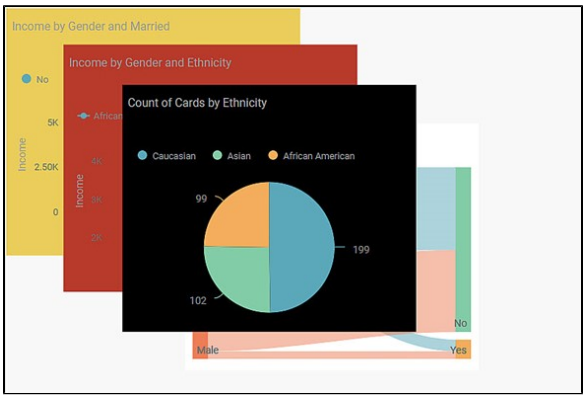
To change the sequence of overlapping widgets, follow the steps given below.

1. Create the number of widgets as required. Refer to *Creating Charts using Widgets*.
   For example, here we plot four widgets as shown in the figure above.
2. Click the widget whose sequence you want to change.
   For example, we click the *Income by Gender and Married* widget. The chart pops up in the front of all other charts on the dashboard.
3. On the top right corner of the widget, click the **More Options** ellipsis ( ).
   The available options are displayed.
4. Hover over the *Bring to Front* option and click **Bring Forward**.

5. Click at any point in the empty space on the dashboard page.
   The *Income by Gender and Married* widget shifts one place in the forward direction. Now, the widget is seen to be stacked in between the second and third widgets in the original image.



6. Similarly, you can use the Send to Back option to move a widget in the backward direction. For example, in the image below, we apply the Send Backward option on the leading widget, that is *Income by Gender and Student*. The widget shifts one place in the backward direction. Now, the widget is seen to be stacked in between the second and third widgets in the original image.



Your Rating:

Show Hide Charts

You can hide a widget if it is not required to be displayed on the dashboard for any reason. The multiple scenarios for using this functionality are given below.

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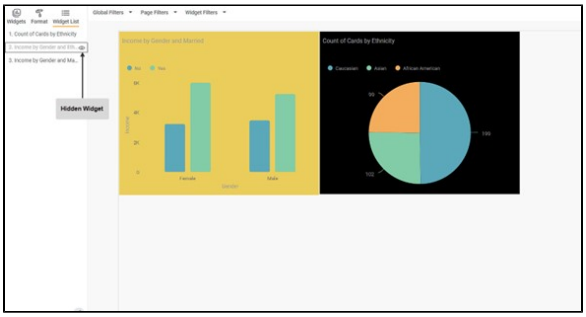
- Scenario 1: Show/Hide a Chart Manually
- Scenario 2: Show/Hide a Chart using Condition
- Scenario 3: Show/Hide using a Boolean Constant String Value (True/False)
- Scenario 4: Show/Hide using Features
- Scenario 5: Show/Hide for Text, HTML, and Image Widgets

Scenario 1: Show/Hide a Chart Manually

For hiding a widget manually, click *Widget List*, hover over the widget title, and click the *Hide Widget Icon* ( ).
The widget gets hidden (disappears) from the Dashboard page. Also, the widget title in the list gets blurred, and a *Show Widget Icon* ( ) appears next to it.

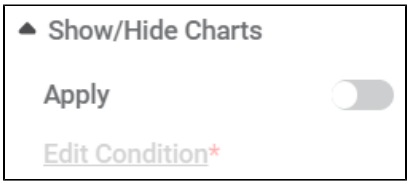


If you want to view the widget again, click the *Show Widget Icon* ( ). The widget appears in the same position.

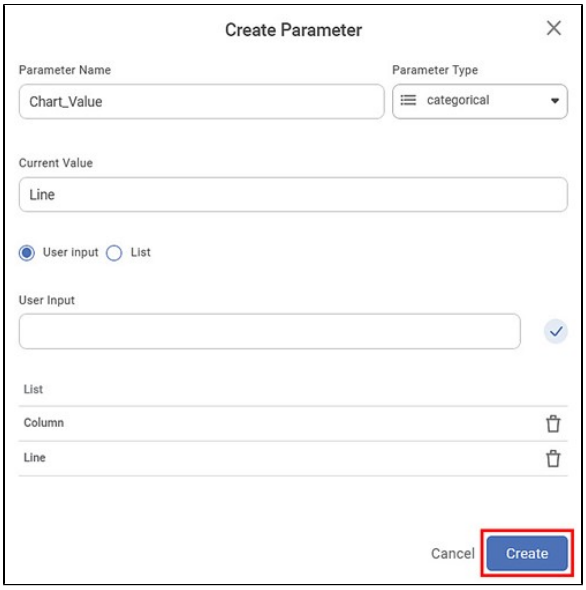
Note :	You can use this functionality in the *Edit Mode* only.

Scenario 2: Show/Hide a Chart using Condition

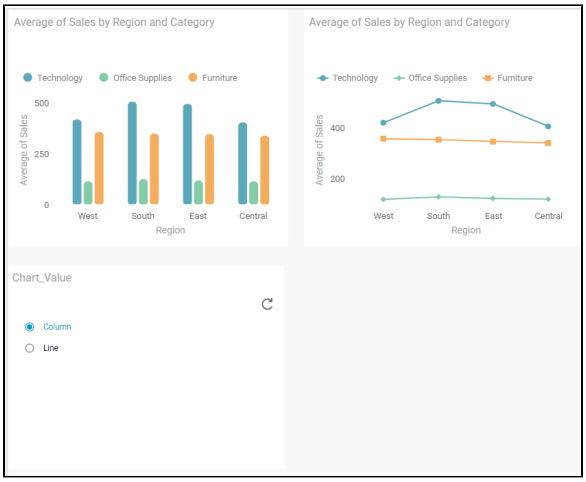
In RubiSight, you can choose to show or hide charts based on a specific condition using the *Show/Hide Charts* formatting option. It applies to all widgets.



To use *Show/Hide Charts* formatting option, plot a chart using the features from the dataset.
For example, we plot a Column Chart and a Line Chart using the same set of dimensions and measures: the *Average of Sales* by *Region* and *Category*.
Also, we create a binary categorical parameter named *Chart_Value* for the two charts, with two values, Column, and Line, as shown below.

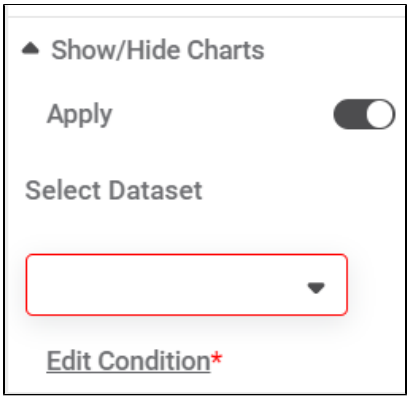


We plot a Parameter widget on the same dashboard page using this parameter. Refer to *Using Parameters in RubiSight* in *RubiSight User Guide*.
The default value for the created parameter is *Column*.
The figure below shows the dashboard containing the two charts and the Parameter Widget in the *Edit Mode*.



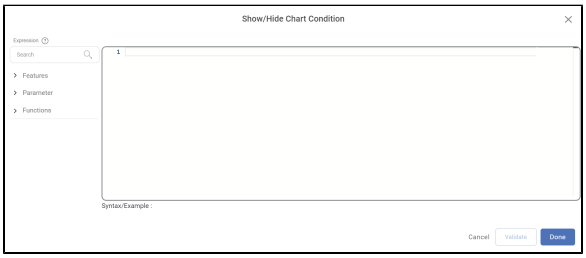
To apply the *Edit Condition*,

1. Turn the *Apply* toggle "ON".
2. Select the dataset.
3. Click **Edit Condition**.



The Show/Hide Chart condition window is displayed.

4. Create a condition using the Expression Builder.



The expression created in the builder should

a. either be a conditional statement or
b. should have Boolean values (true or false) as output

Notes:

- By default, the *Show/Hide Charts* option and *Edit Condition* tab are disabled (the Condition is *False*).
- If the output of the expression does not contain a condition, then the expression builder gives an error message *"Expression is invalid due to non-conditional statement"* on validation.
- You can create and add only one Condition to a widget.
- The effect of *Show/Hide Condition* can be seen in ***View Mode*** only.

For example, we use the *Comparator Operator (==)* to create conditions separately for the *Column* and *Line* charts using the created parameter.
We create the following expression for the Column Chart. When the Chart_Value = *Column*, the Column Chart is shown; else, it is hidden.

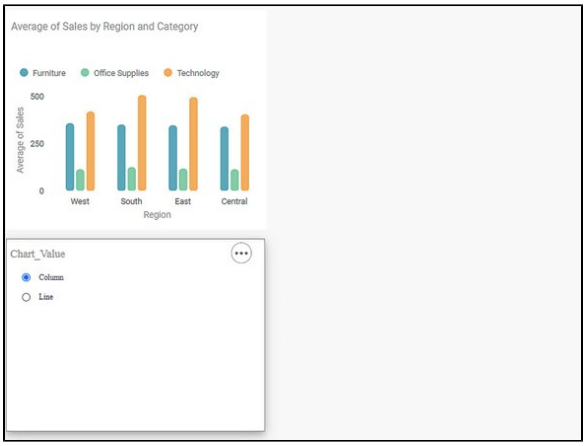
```
1 @@Chart_Value@@ == "Column"
```

Also, we create the following expression for the Line Chart. When the Chart_Value = *Line*, the Line Chart is shown; else, it is hidden.

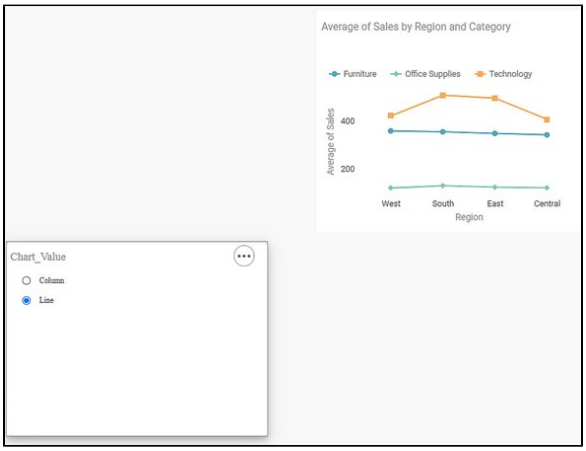
```
1 @@Chart_Value@@ == "Line"
```

The above expressions are valid because their output can be *True* or *False*.
Now, switch to the *View Mode*. Since the default value for *Chart_Value* is *Column*, the Column Chart is

shown, and Line Chart is hidden.



Now, select the radio button for the Line option in the Parameter Widget. The Chart-Value is Line for the Line Chart. Hence, the Line Chart is shown, and Column Chart is hidden.



Scenario 3: Show/Hide using a Boolean Constant String Value (True/False)

Now, from Scenario 2,

1. Change the Show/Hide Condition for the Column Chart from *Chart_Value == Column* to simply *T rue*. It means that the Condition for the Column Chart is always true.
2. Keep the Condition for the Line Chart unchanged.

If you switch to *View Mode*, you see that the Column Chart is always shown for any selection of the Parameter widget.

Case 1: When the Parameter Widget selection = Column

Case 2: When Parameter Widget selection = Line

Scenario 4: Show/Hide using Features

You can use the features/columns from the dataset used to plot the chart for the show/hide condition.

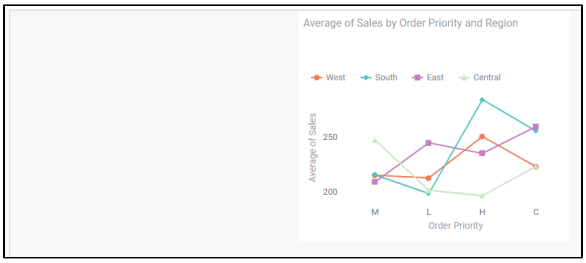
Condition: *"If the selected value (while creating the expression) corresponds with the first value in the sorting order of the feature, the column is shown in the View Mode, else hidden."*

For example, we plot a Column and a Line Chart for the *Average of Sales* by *Order Priority* and *Region*. The first value for *Order Priority* in the two charts are *Critical* and *Medium,* respectively, as shown below.

Next, we create the following expression for both charts. When the Order Priority = *Medium, the charts are shown, else hidden*.

```
1  @@Chart_Value@@ == "M"
```

Now, switch to the *View Mode*. The *Column Chart* is hidden while the *Line Chart* is shown since it satisfies the Condition.



Scenario 5: Show/Hide for Text, HTML, and Image Widgets

Although Text, HTML, and Image widgets do not need datasets to plot, you can still apply the *Show/Hide* condition on them using a dataset present in the dashboard. Once you select a dataset for any charts, you can create a condition using a feature present in the dataset.
Click **Format** and click the **Select Dataset** drop-down to add a dataset. Select the dataset you want to add to the charts from the list.
For example, in the dashboard, we have a dataset named *Sp_Sample_Superstore.* It contains a feature named *Order Priority* with four categorical values *C (Critical), H (High), M (Medium),* and *L (Low)*.

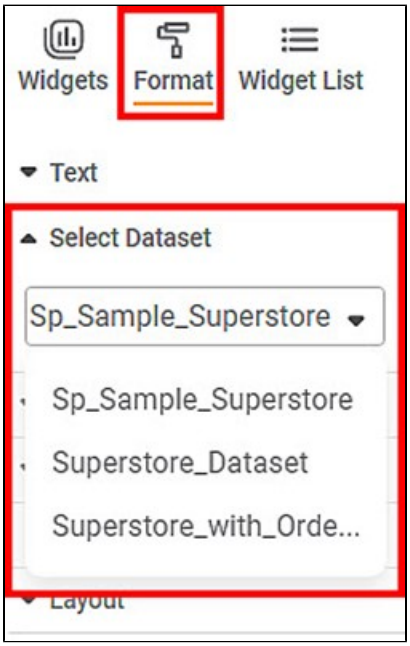
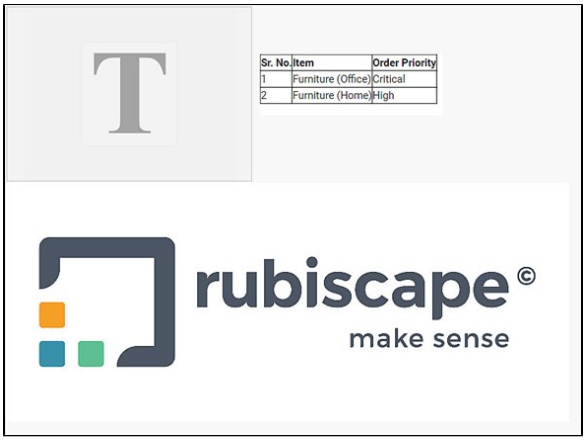


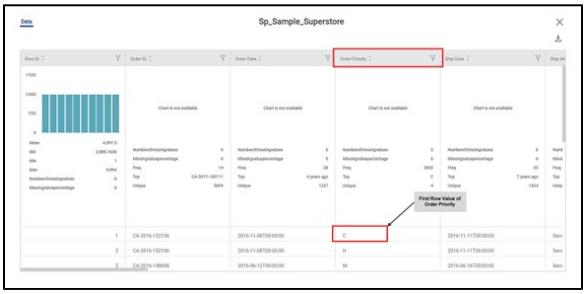
Figure: Selecting Dataset

Condition: *"If the selected value (while creating the expression) corresponds with the first-row value of the feature in the dataset, the column is shown in the View Mode, else hidden."*

For example, we plot a *Text Chart*, an *HTML Chart* (a simple table), and an *Image Chart,* as shown below.



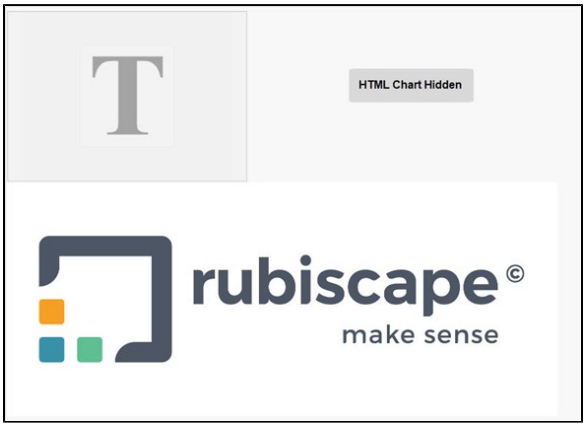
The snippet of the dataset used to plot the charts is shown below.



As you can see, the value in the first row for Order Priority is "**C**."
Next, we create the following conditions for the three charts as explained above.

- For Text and Image Charts, Order Priority = C
- For HTML Chart, Order Priority = M

Now, switch to the View Mode. The *HTML Chart* is hidden while the *Text* and *Image* charts are shown since they satisfy the Condition.



Your Rating:

Search Option In Filter Widget

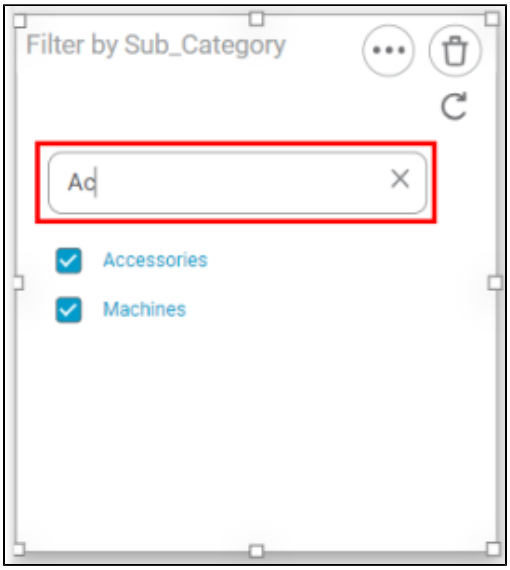
In RubiSight, a *Filter Widget* filters data present in other widgets on the same dashboard page. Usually, a categorical feature is used to plot a filter widget.
When you plot a filter widget, the values appear on the filter widget in the form of

- *List*
- *Dropdown*
- *Button*
- *Toggle Button*

If the number of values is large, you need to scroll down the list to find the appropriate value.
Instead, you can use the *Search Field* to search for a value of your choice. The *Search Field* is not case-sensitive. You can search using any of the following text strings

- *Single letter*
- *Group of letters*
- *Complete name*

In the example below, a search string '*ac*' returns two search results, *Accessories* and *Machines*.



Notes:	• A numerical feature can also be used to plot a filter widget. • However, the number of distinct values is usually too large to be listed and the values are displayed in a range. • Hence, a different set of *Type* options are used. • *Between* • *Less than or equal to* • *Greater than or equal to*

Your Rating:

Exporting Chart and Data

Exporting charts and data helps you store/save them in your device or on the cloud. You can then share or view the chart in PDF format and data in CSV format.

Exporting Chart

To export the chart, follow the steps given below.

1. Create the number of charts as required. Refer to Creating Charts using Widgets.
2. Select the widget that you want to export.
3. On the top right corner of the widget, click the **More Options** ellipsis ( ).
   The available options are displayed.
4. Click the **Export Chart In PDF** option.
   The selected widget is saved as a PDF file in your default download folder.

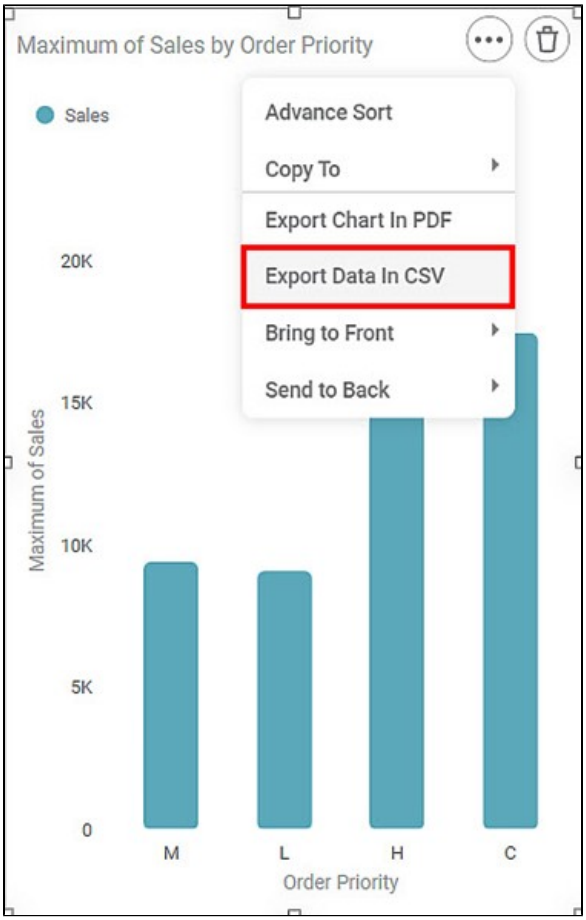
Exporting Data

To export data, follow the steps given below.

1. Create the number of charts as required. Refer to *Creating Charts using Widgets*.
2. Select the widget from which you want to export data.
3. On the top right corner of the widget, click the **More Options** ellipsis ( ).

The available options are displayed.

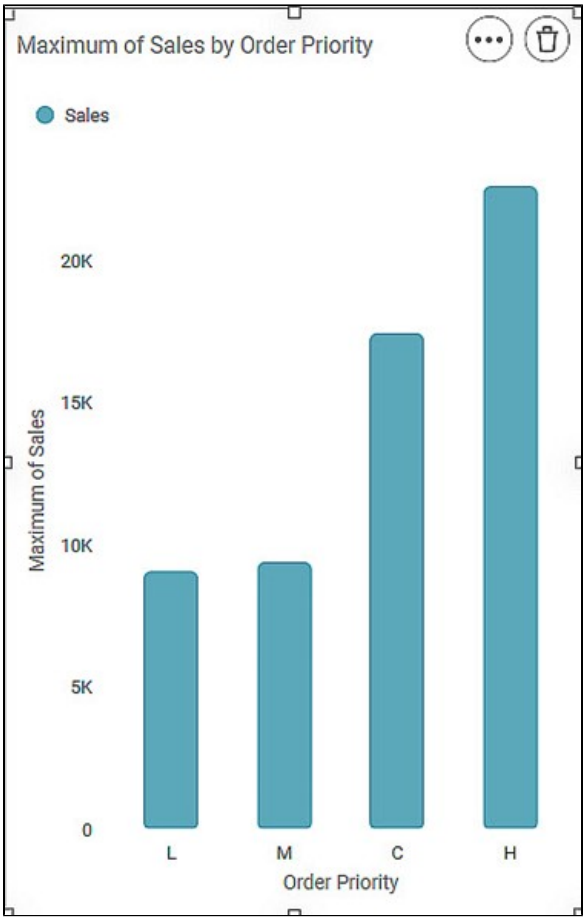
1. Click the **Export Data In CSV**
   The data of the selected widget is saved as a CSV file in your default download folder.
   For example, we plot a *Column Chart* of the *Maximum of Sales* by *Order Priority*in a sales dataset, as shown below.



A snippet of the data stored in the CSV file for the above Column Chart is shown below.

	A	B	C
1	Order Priority	Sales	
2	M	9449.95	
3	L	9099.93	
4	H	22638.48	
5	C	17499.95	
6			

Now, let's sort the widget by arranging the *Maximum of Sales* in the *Ascending* Order. The resultant widget is as shown below.



Now, we export the data from the sorted chart as CSV. A snippet of the data is shown below.

	A	B	C
1	Order Priority	Sales	
2	L	9099.93	
3	M	9449.95	
4	C	17499.95	
5	H	22638.48	
6			

You can see that the data in the new CSV file is also arranged in the same order as the chart, that is, *Ascending* order.

Notes:

- Some browsers will ask you to select the location where you want to save your dashboard. Select the destination folder, and then click *Save*.
- The *Export Data In CSV* option is disabled when you drag and drop a widget on the dashboard canvas but have not plotted it.
- When you download the CSV dataset, the default name of the file is the title name of the widget.
- In the above example, the default file name is "*Maximum of Sales by Order Priority*".
- For measure quantity, the name of the column in the downloaded CSV has the following format.
  - ***"measure_name (aggeregated_function_used)"***
- In the above example, since the *Sales* values are aggregated by the *Maximum* function, the name of the column is *Sales (max)*.

Your Rating:

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- Exporting Chart
- Exporting Data

Using Parameters in RubiSight

In RubiSight, two types of user-defined values are available,

- Calculated Column
- Parameters

A Calculated Column is created as a new column created that was not a part of the original dataset. The new column is related to one (or more) of the existing columns in that it is created from them.

For example, you can add or multiply a fixed number to each value in a column or add two columns to create a new column. Thus, the values in a Calculated Column are not independent of the dataset.

On the other hand, parameters are static values created for adding to specific columns in a dataset to study their impact on the column values. A parameter is created, and its value is selected independently of the dataset. Also, you can use a parameter inside a Dashboard on any page.

In RubiSight, four types of Parameters are available –

- Categorical
- Numerical
- Interval
- Boolean

Each Parameter type requires a different set of values for creation. However, they are employed on a Dashboard in the same way.

In RubiSight, to use the created Parameter, a Calculated Column must be created for the Parameter.

You can create a Calculated Column by,

- Creating an Expression
- Using the Code Editor
- Using the Parameter

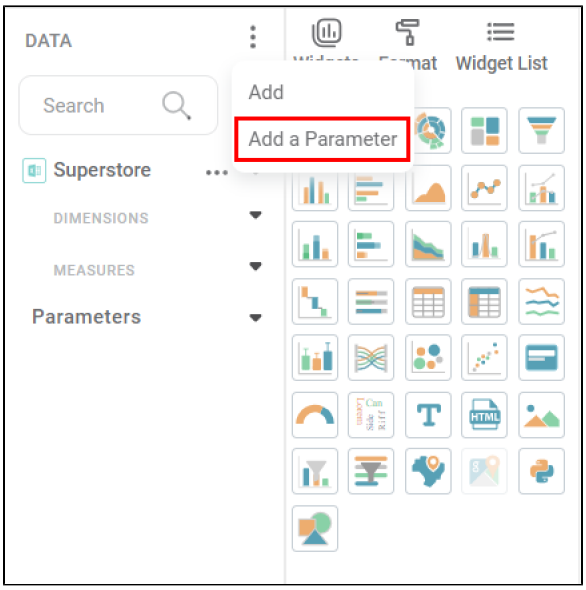
Your Rating:

Adding a Parameter

Before using a Parameter, we add and create the Parameter in the Dashboard. In the RubiSight **DATA** pane, a *Parameter* is present as an independent entity.

To add a *Parameter* in a Dashboard, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to *Opening a Dashboard*.
   The Dashboard is displayed.
2. Add a dataset to the Dashboard. Refer to *Adding Dataset to the Dashboard*.
   a. In the **DATA** pane, click the vertical ellipsis, and then click **Add a Parameter** from the listed options.

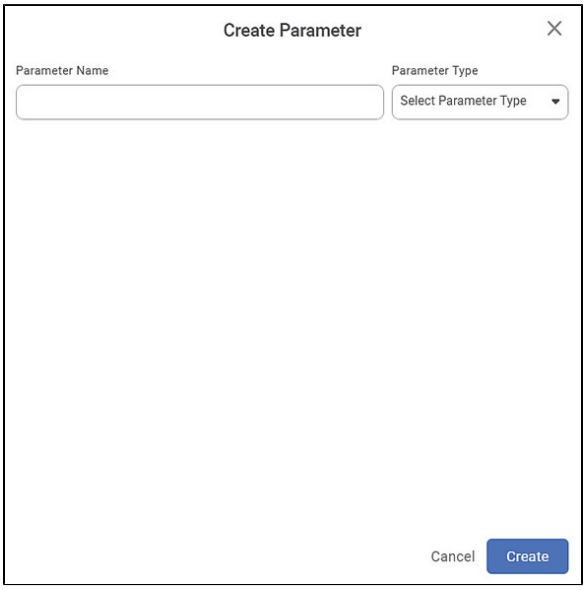


The *Create Parameter* page is displayed.

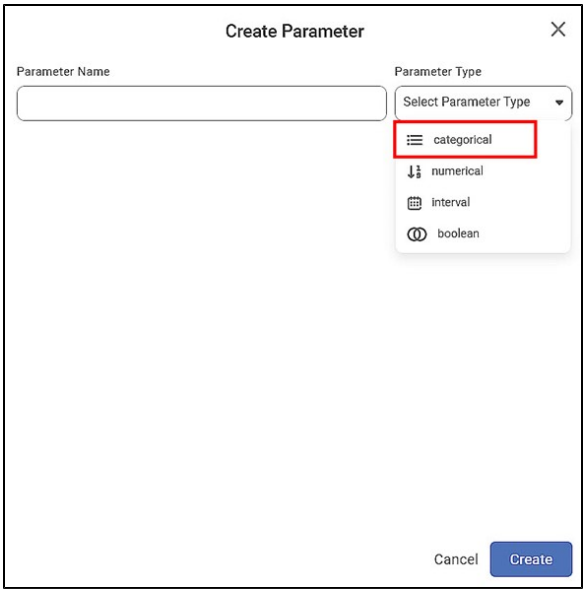
Creating a Categorical Parameter

To create a *Categorical Parameter*, follow the steps given below.

1. Perform steps 1 to 3 of *Adding a Parameter*.
2. On the *Create Parameter* page, enter the **Parameter Name**.



3. Select the *categorical* option from the **Parameter Type** drop-down.

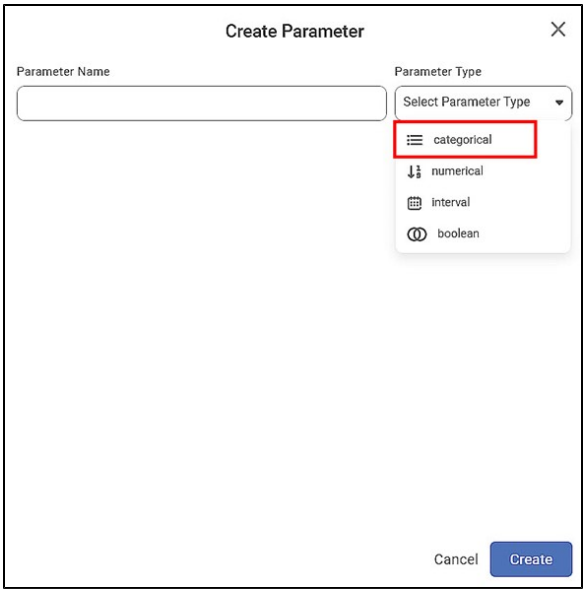


Note:	When you select a *Parameter Type*, the fields to capture its details are displayed on the *Create Parameter* page.

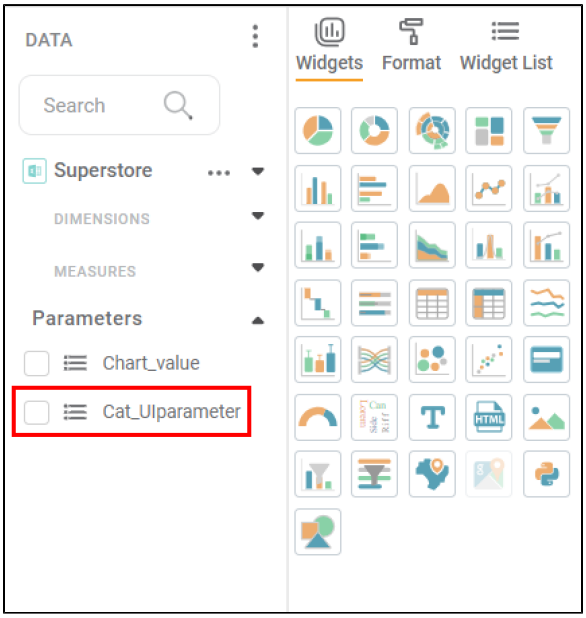
Field	Description	Remark
Parameter Name	It is the name assigned to the newly created Parameter.	—
Parameter Type	It allows you to select the type of parameter you want to create.	The available options are, • Categorical • Numerical • Interval • Boolean
Current Value	It is the value that is used in the RubiSight application when we configure the Parameter.	• The user enters this value. • This value is required for both *User Input* and *List* options of Parameter creation. • This value is displayed by default when we plot the Parameter widget.
User Input	It allows you to manually enter the values to create a list of categorical variables.	The radio button is selected by default.

List	The radio button, when selected, allows you to import/upload a CSV file and use a column from the file.	• The *Current* value is mandatory in both *User Input* and *List*.
		• The *Current* value should be present in
		  • the list created in the *User Input* method or
		  • a feature value from the uploaded *CSV file* in the *List* method.

4. In the **User Input** field, enter categorical values one by one.
5. Click the **save** icon ( ) each time to save each entered value to create a list of the values.
6. Enter the required value in the **Current value** from the **List**
7. Click **Create**.



The Categorical Parameter is created. The newly created Categorical Parameter appears in the *DATA* pane under *Parameters*.



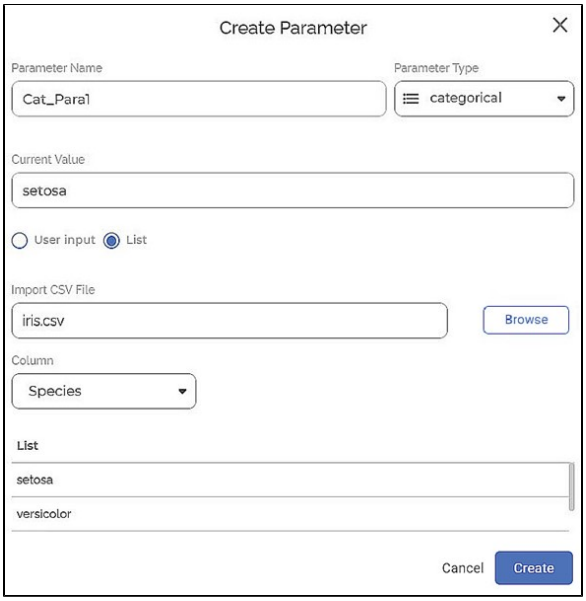
Creating a Categorical Parameter using List

To create a Categorical Parameter using the *List* method, follow the steps given below.

1. Perform steps 1 to 4 of *Creating a Categorical Parameter*.
2. Click **List**.
3. Click **Browse** located next to the **Import CSV File** field**.**
   You are navigated to the folder structure of your system containing CSV files.
4. Select and double-click the *File* that you want to use.
   The file gets uploaded. The available categorical feature is listed in the *Column* field. The unique values of the categorical feature appear under *List*.

Notes:	• If the dataset in the CSV file contains more than one *Categorical* feature, the features appear in the *Select Column* drop-down of the *Column* field. From the *Select Column* drop-down, you can select the feature that you want to add. • The unique values of the selected categorical feature appear under *List*. • If you import a CSV file that does not contain any Categorical feature, a message *UPLOAD CATEGORICAL DATASET WHICH CONTAINS CATEGORICAL VALUES* is displayed below the *Import CSV File* field.

5. Type the unique value that you want to use in the **Current Value**
6. Click **Create**.

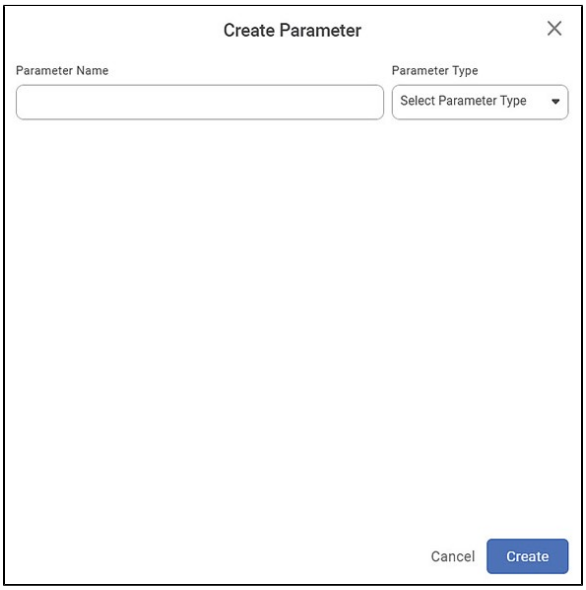


The Categorical Parameter is created. The newly created Categorical Parameter appears in the *DATA* pane under *Parameters.*

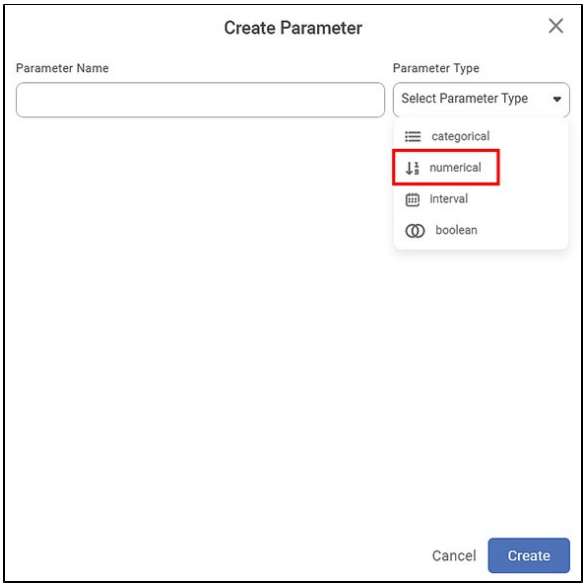
Creating a Numerical Parameter

To create a Numerical Parameter, follow the steps given below.

1. Perform steps 1 to 3 of *Adding a Parameter*.



2. On the *Create Parameter* page, enter the **Parameter Name.**
3. Select the **numerical** option from the **Parameter Type** drop-down.



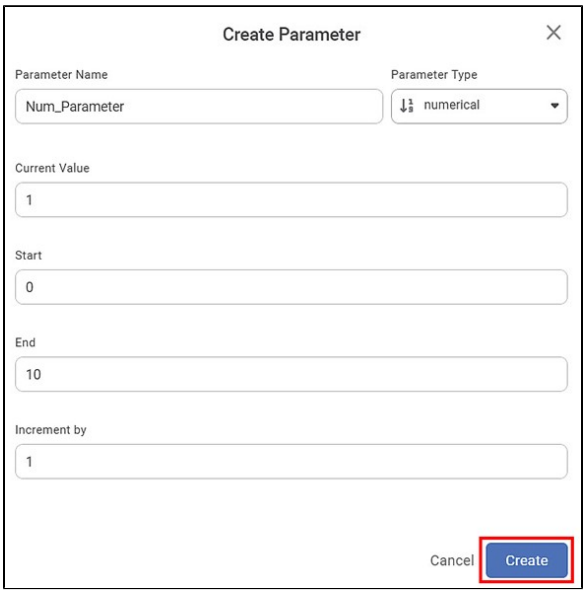
The *Create Parameter* page displays fields corresponding to the Numerical Parameter.

4. Enter the required values in the remaining data fields.
   The table below describes the fields required to create the Numerical Parameter.

Table: Fields required to create Numerical Parameter

Field	Description	Remark
Current Value	It is the value that is used in the RubiSight application when we configure the Parameter.	This value is displayed by default when we plot the Parameter widget.
Start	It is the minimum value of the Numerical Parameter.	—
End	It is the maximum value of the Numerical Parameter.	—
Increment by	This value decides the number by which the Parameter value increases in each step.	—

5. Click **Create**.

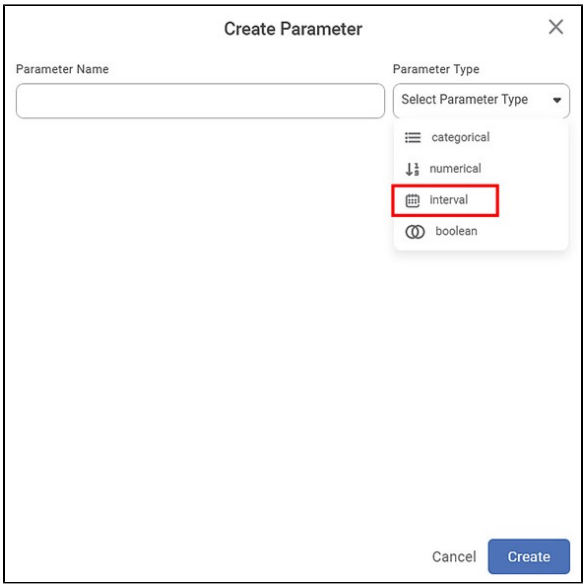


The Numerical Parameter is created. The newly created Numerical Parameter appears in the *DATA* pane under *Parameters.*

Creating an Interval Parameter

To create an Interval Parameter, follow the steps given below.

1. Perform steps 1 to 3 of *Adding a Parameter*.
2. On the *Create Parameter* page, enter the **Parameter Name**.
3. Select the **interval** option from the **Parameter Type** drop-down.

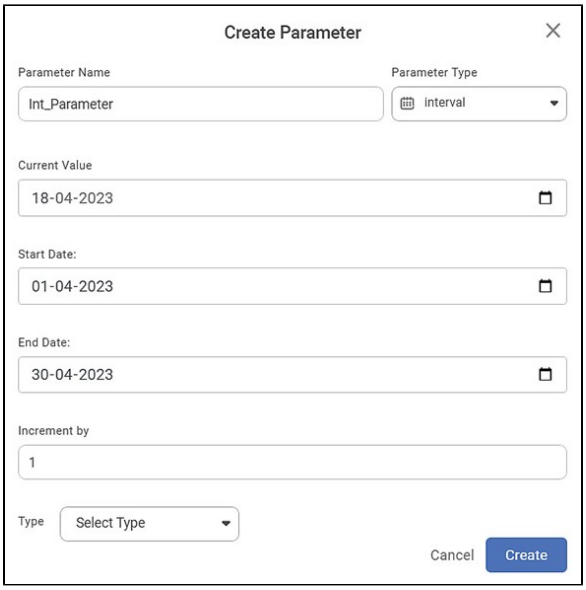


The *Create Parameter* page displays the fields corresponding to the interval parameter.

4. Enter the required values in the remaining data fields.

The table below describes the fields required to create the Interval Parameter.

5. Click **Create**.



The Interval Parameter is created. The newly created Interval Parameter appears in the *DATA* pane under *Parameters*.

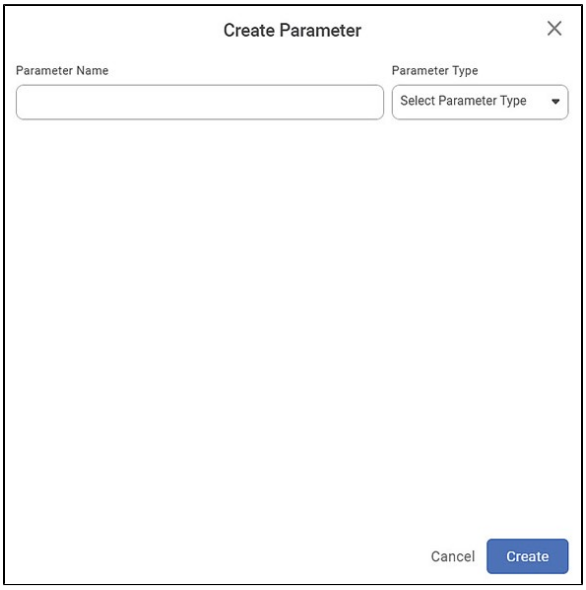
Field	Description	Remark
Current Value	It is the value that is used in the RubiSight application when we configure the Parameter.	• This field is disabled by default. • It is enabled when you select the correct *Start Date* and *End Date*. • This value is displayed by default when we plot the Parameter widget.
Start Date	It is the starting value of the time interval.	The date format is DD-MM-YYYY.
End Date	It is the ending value of the time interval.	The date format is DD-MM-YYYY.

Increment by	This value decides the number by which the Parameter value increases in each step.	—
Type	It allows you to select the type, which is the unit for the *Increment by* value.	The available options are – • Days • Weeks • Months • Quarters • Years

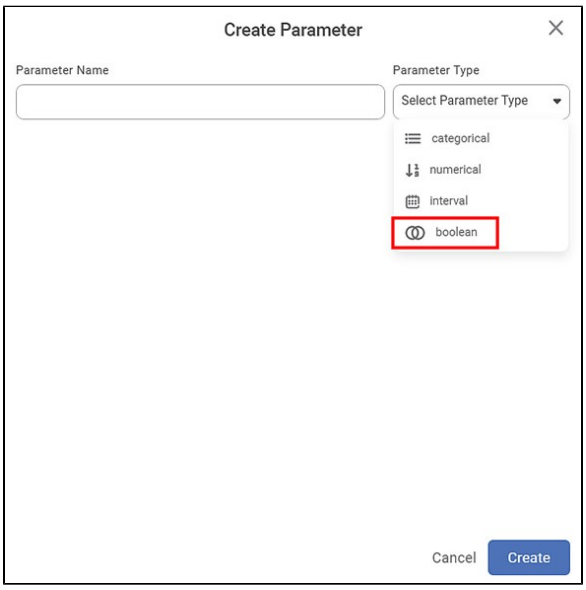
Creating a Boolean Parameter

To create a Boolean Parameter, follow the steps given below.

1. Perform steps 1 to 3 of *Adding a Parameter*.



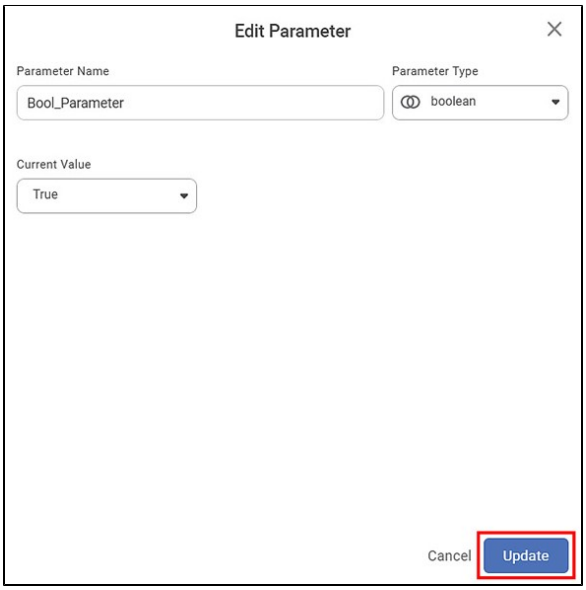
2. On the *Create Parameter* page, enter the **Parameter Name**.
3. Select the **boolean** option from the **Parameter Type** drop-down.



   The *Create Parameter* page displays the field corresponding to the Boolean parameter.
4. Select a value from the **Current Value** drop-down.

Note:	The default value in the *Current Value* field is True. The available options for the *Current value* are *True* and *False*.

5. Click **Create**.



The Boolean Parameter is created. The newly created Boolean Parameter appears in the *DATA* pane under *Parameters*.

Your Rating:

Table of Contents

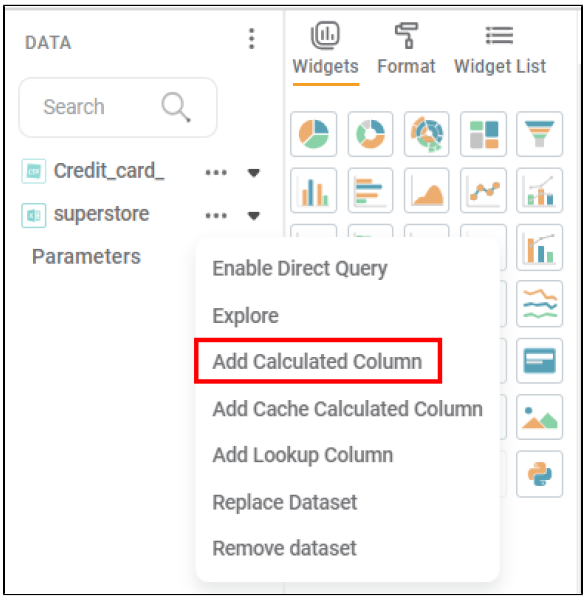
- Creating a Categorical Parameter
  - Creating a Categorical Parameter using List
- Creating a Numerical Parameter
- Creating an Interval Parameter
- Creating a Boolean Parameter

Adding Calculated Column to Dataset

The created Parameter can be used in the Dashboard on any page. To use the Parameter, we first create a Calculated Column based on the Parameter.

To create a Calculated Column, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to *Editing the dashboard*.
   The Dashboard is displayed.
2. Add a dataset to the Dashboard. Refer to *Adding a dataset to the dashboard*.
3. In the *DATA* pane, click the ellipsis corresponding to the dataset, and then click **Add calculated column** from the listed options.



   The *Add Calculated Column* page is displayed.
4. Enter the **Calculated column name**.
5. Select the **Variable Type** from the drop-down.

Notes:	• The available options in *Variable Type* are – *Categorical*, *Numerical*, *Textual*, and *Interval*. • The *Data type* field is not editable. Once you select the *Feature*, *Parameter*, and *Expression* to be applied, the corresponding data type appears in the field automatically.

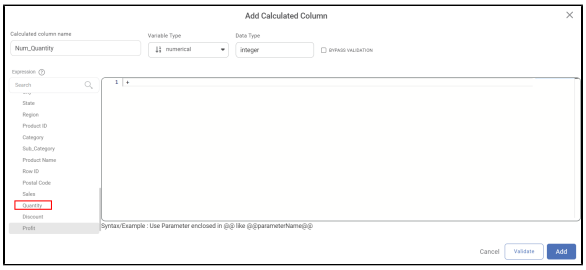
Creating Calculated Column by Creating an Expression

To create an Expression, follow the steps given below.

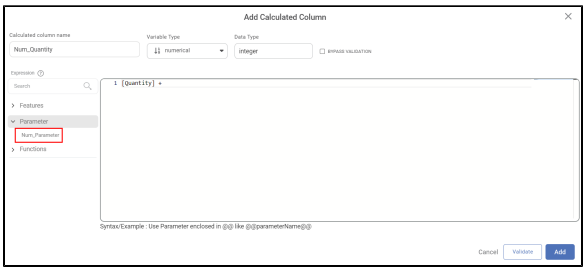
1. Perform steps 1 to 5 of *Adding Calculated Column to Dataset*.
   In this example, the **Calculated column name** is *Num-Quantity* and the **Variable Type** selected is *numerical***.**
2. In the left pane, click the *Expression* that you want to apply. In the example, we use the *Mathematical*
   Corresponding operators are displayed.
3. Select the required operator. For more information about operators in Rubiscape, refer to Operators in Expression Builder.
   In the example, the *Addition* operator is selected.

The selected operator is added to the canvas.

4. Click **Features** in the left pane.
   The feature block is added to the canvas.
   In the example, we select the *Quantity* variable as the feature.
5. Click the feature block and select the required *feature* from the drop-down.



6. Click **Parameter** in the left pane.
   The created Parameter is displayed on the canvas. In the example, the Numerical Parameter created is displayed on the canvas.

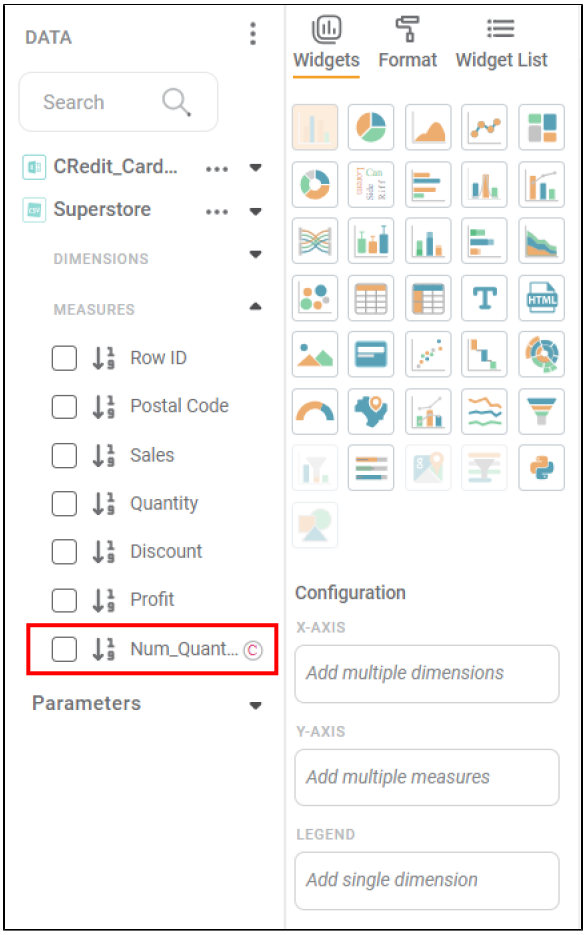


7. Based on your requirement, add the *Feature* and *Parameter* to the operator and create your expression

8. Click **Validate**.
   If the expression is valid, a confirmation message is displayed in the bottom-left corner.
9. Click **Add**.

The selected Parameter is added as a column to the dataset.

10. In the *DATA* pane, click the **Measures** drop-down.



The newly added Calculated Column is displayed in the list with a © symbol.

The selected Parameter can be used with the newly created Calculated Column. In the example, the Numerical Parameter *Num-_Parameter*c an be used with the newly created Calculated Column, *Num_Column*.

Creating Calculated Column using Parameter

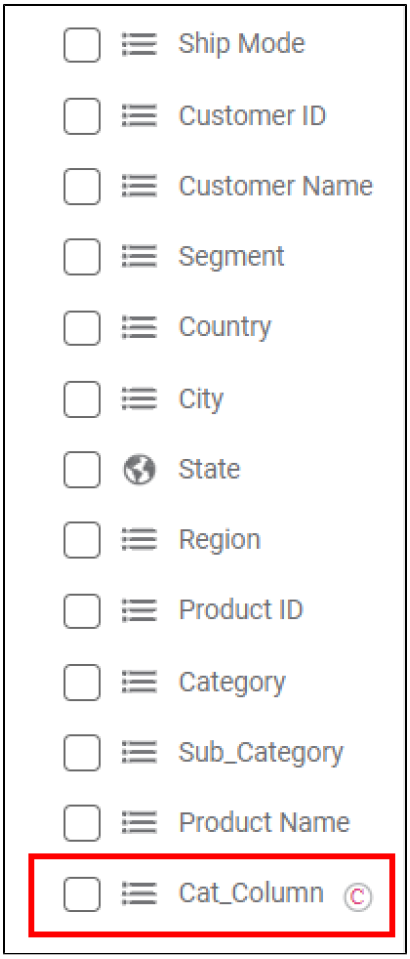
You can create a Calculated Column using a newly created Parameter directly, then validate it, and use it in the Dashboard.

To create a Calculated Column using a newly created Parameter, follow the steps given below.

1. Perform steps 1 to 5 of *Adding Calculated Column to Dataset*.
   In this example, the **Calculated column name** is *Cat-Column* and the **Variable Type** selected is *categorical*.
2. In the left pane, click **Parameter**.
   The created Parameters block is added to the canvas.
3. Click the Parameter block and select the required *Parameter* from the drop-down.
   In the example, we select the *Cat_UIParameter,* which is a categorical parameter.
4. Click **Validate**.
   If the Parameter is valid, a confirmation message is displayed in the bottom-left corner.
5. Click **Add**.

The selected Parameter is added as a column to the dataset.

6. In the *DATA* pane, click the **Dimensions** drop-down.



The newly added Calculated Column is displayed in the list with a © symbol. The dataset can be used with the newly added Calculated Column.

Note:	You can abort the addition of the *Calculated Column* and close the page by using **Cancel**.

Your Rating:

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- Creating Calculated Column by Creating an Expression
- Creating Calculated Column using Parameter

Using a Parameter Old

You can use the created Parameter in any of the widgets in the Dashboard. You can change the values in the selected Calculated Column based on the value of the selected Parameter.

Using a Numerical Parameter

To use a created Numerical Parameter, follow the steps given below.

1. Plot a widget of your choice. Refer to *Creating charts using Widgets*.
   In the example, we plot a Table widget. We use *Quantity (None)*, *Num_Column (None)*, *Category*, and *Segment* as the Configuration parameters.

Notes:	• When you plot a widget, make sure to use the Calculated Column as one of the parameters. • In the example, *Num-Column (None)* is the Calculated Column.

None of Quantity and None of Num_Column by Segment an Category

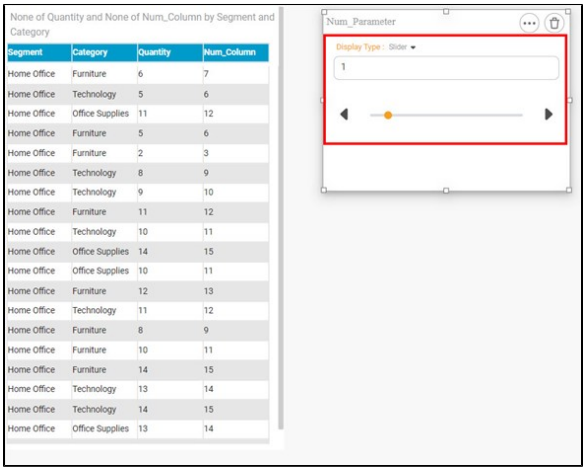
Segment	Category	Quantity	Num_Column
Home Office	Furniture	6	7
Home Office	Technology	5	6
Home Office	Office Supplies	11	12
Home Office	Furniture	5	6
Home Office	Furniture	2	3
Home Office	Technology	8	9
Home Office	Technology	9	10
Home Office	Furniture	11	12
Home Office	Technology	10	11
Home Office	Office Supplies	14	15
Home Office	Office Supplies	10	11
Home Office	Furniture	12	13
Home Office	Technology	11	12
Home Office	Furniture	8	9
Home Office	Furniture	10	11
Home Office	Furniture	14	15
Home Office	Technology	13	14
Home Office	Technology	14	15
Home Office	Office Supplies	13	14

2. To apply the created Parameter, create the **Parameter widget**. Refer to *Creating charts using Widgets*.
   In the example, we use the *Num_Parameter* as the *Parameter* of type Numerical.
   The Parameter widget displays the *Display Type* value as one *(1)* since it was the default value selected while creating the Parameter.
   There are three options available to change the value in the **Display Type** field. You can click the down arrow next to *User Input* to view and select the options from the drop-down list.
   The table below describes how the Numerical Parameter value can be changed.

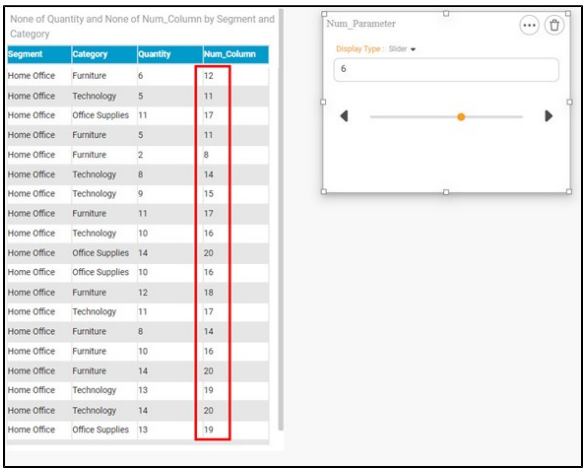
Table: Fields to Change the Numerical Parameter

Field	Description	Remark
User Input	It allows you to enter a value manually in the *Display Type* field.	• It is the Current value in the field. • When the Parameter widget is plotted, the Display Type field displays the Current value selected while creating the Parameter.
User Input – Up /Down Arrow	It allows you to operate the upward/downward arrows to increase /decrease the value in the *Display Type* field at a pre-decided increment frequency.	The pair of arrows appear in the Display Type field on the right.
Slider		When this option is selected from the drop-down, a slider is displayed in the Parameter widget.

	It allows you to operate the slider dot or a pair of arrows on the two ends of the slider to change the value in the *Display Type* fiel d.	



3. To apply the parameter on the selected column, change the value in the **Display Type** field.
   In the example, we use the *slider* and change the value from 1 to 6.



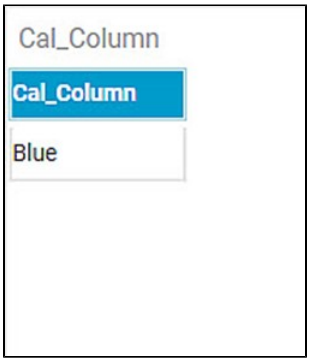
The corresponding values in the *Num Column* increase by Six. Since the Current value of the *Num_Parameter* is incremented by Six, each value in the *Num_Column* is incremented by Six.

Using a Categorical Parameter

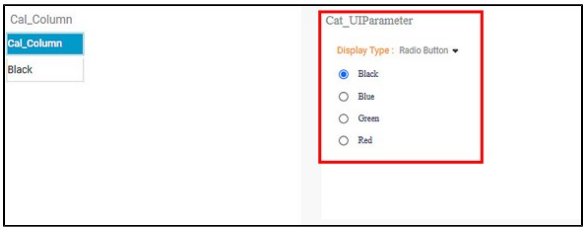
To use a created Categorical Parameter, follow the steps given below.

1. Plot a widget of your choice. Refer to *Creating charts using Widgets*.

   In the example, we plot a Table widget using the Categorical Parameter *Cat_Column* as the Configuration parameter.



2. To apply the created Parameter, create the **Parameter widget**. Refer to *Creating charts using Widgets*.
   This widget has only one parameter, which is the *Cat_UIParameter*.



   The Parameter widget displays the *Display Type* value as *Black* since it was the Current value selected while creating the Parameter.

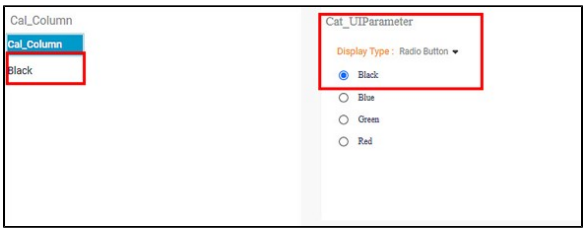
   There are five options available to change the value in the **Display Type** field. You can click the down arrow next to the *User Input* to view and select the options from the drop-down list.

   The table below describes how the *Categorical Parameter* value can be changed.

Table: Fields to change the Categorical Parameter

Field	Description	Remark
User Input	It allows you to enter a value manually in the *Display Type* field.	• It is the Current value in the field. • When the Parameter widget is plotted, the Display Type field displays the Current value selected while creating the Parameter.
User Input – Up /Down Arrow	It allows you to operate the upward/downward arrows to increase /decrease the value in the *Display Type* field at a pre-decided increment frequency.	The pair of arrows appear in the Display Type field on the right.
Slider	It allows you to operate the slider dot or a pair of arrows on the two ends of the slider to change the value in the *Display Type* fiel d.	When this option is selected from the drop-down, a slider is displayed in the Parameter widget.
Single Value Drop Down	When selected, it creates a drop-down list from which you can select a value.	Only one value can be selected.
Radio Button	When selected, it creates a list of parameter values with a radio button assigned to each value.	Only one value can be selected.

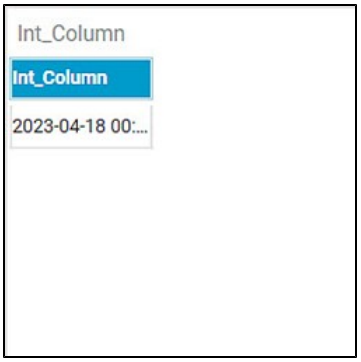
3. To apply the parameter on the selected column, change the value in the **Display Type** field.
   In the example, we use the *Radio Button* and change the value from *Black* to *Red*. There is a corresponding change in the Calculated column in the Table widget.



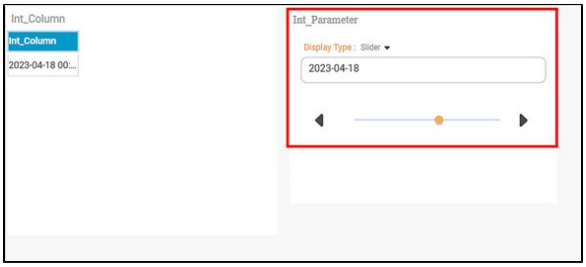
Using an Interval Parameter

To use a created Interval Parameter, follow the steps given below.

1. Plot a widget of your choice. Refer to *Creating charts using Widgets*.
   In the example, we plot a Table widget using the Interval Parameter *Int_Column* as the Configuration parameter.



2. To apply the Parameter, create the **Parameter widget**. Refer to *Creating charts using Widgets*.
   This widget has only one parameter, which is the *Int_Parameter*.



   The Parameter widget displays the *Display Type* value as *2023-04-18* since it was the Current value selected while creating the Parameter.

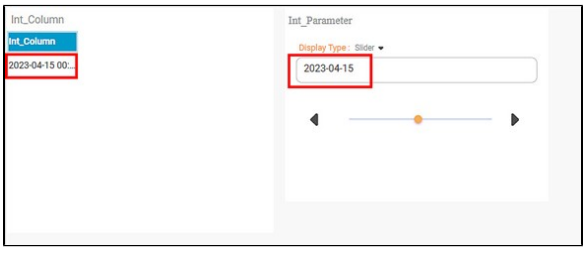
   There are two options available to change the value in the **Display Type** field. You can click the down arrow next to the *User Input* to view and select the options from the drop-down list.

   The table below describes how the Interval Parameter value can be changed.

Table: Fields to Change the Interval Parameter

Field	Description	Remark
User Input	It allows you to enter a value manually in the *Display Type* field.	• It is the Current value in the field. • When the Parameter widget is plotted, the Display Type field displays the Current value selected while creating the Parameter.
Slider	It allows you to operate the slider dot or a pair of arrows on the two ends of the slider to change the value in the *Display Type* field.	When this option is selected from the drop-down, a slider is displayed in the Parameter widget.

3. To apply the parameter on the selected column, change the value in the **Display Type** field.
   In the example, we use the *slider* and change the value from *2023-04-18* to *2023-04-15*.
   You will notice a corresponding change in the Calculated column in the Table widget.



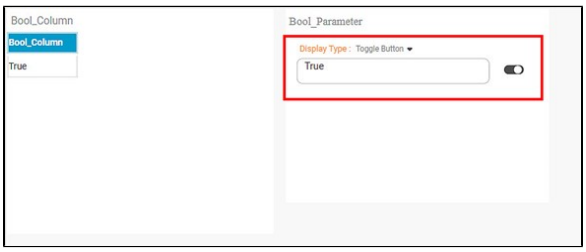
Using a Boolean Parameter

To use a created Boolean Parameter, follow the steps given below.

1. Plot a widget of your choice. Refer to *Creating charts using Widgets*.

In the example, we plot a Table widget. We use the Boolean Parameter Bool_*Column* as the Configuration parameter.

2. To apply the Parameter, create the **Parameter widget**. Refer to *Creating charts using Widgets*.
This widget has only one parameter, which is the *Bool_Parameter*.



The Parameter widget displays the *Display Type* value as *True* since it was the Current value selected while creating the Parameter.
There are two options available to change the value in the **Display Type** field. You can click the down arrow next to the *User Input* to view and select the options from the drop-down list.
The table below describes how the Boolean Parameter value can be changed.

Field	Description	Remark
User Input	It allows you to enter a value manually in the *Display Type* field.	• It is the Current value in the field. • When the Parameter widget is plotted, the Display Type field displays the Current value selected while creating the Parameter.
Toggle Button	It allows you to operate the toggle button () to change the value.	

To apply the parameter on the selected column, change the value in the **Display Type** field.
In the example, we use the *Toggle Button* and change the value from *True* to *False*.
You will notice a corresponding change in the Calculated column in the Table widget.

Notes:	• If there is more than one widget on a Dashboard page, the selected Parameter can be applied to only those widgets plotted using the Calculated Column. • Those widgets which do not contain the Calculated Column remain unaffected even after altering the Parameter value from the Parameter widget.

Your Rating:

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- Using a Numerical Parameter
- Using a Categorical Parameter

- Using an Interval Parameter
- Using a Boolean Parameter

Using a Parameter

You can use the created parameter in any of the widgets on the dashboard. You can change the values in the selected Calculated Column based on the value of the selected Parameter.

Using a Numerical Parameter

To use a created Numerical Parameter, follow the steps given below.

1. Plot a widget of your choice. Refer to *Creating charts using Widgets*.
   In the example, we plot a Table widget. We use *Quantity (None)*, *Num_Column (None)*, *Category*, and *Segment* as the Configuration parameters.

Note	• When you plot a widget, make sure to use the Calculated Column as one of the parameters.

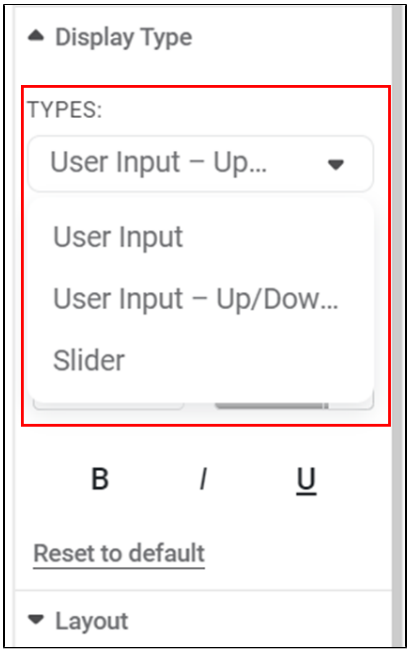
   In the example, *Num-Column (None)* is the Calculated Column.

None of Quantity and None of Num_Column by Segment an Category

Segment	Category	Quantity	Num_Column
Home Office	Furniture	6	7
Home Office	Technology	5	6
Home Office	Office Supplies	11	12
Home Office	Furniture	5	6
Home Office	Furniture	2	3
Home Office	Technology	8	9
Home Office	Technology	9	10
Home Office	Furniture	11	12
Home Office	Technology	10	11
Home Office	Office Supplies	14	15
Home Office	Office Supplies	10	11
Home Office	Furniture	12	13
Home Office	Technology	11	12
Home Office	Furniture	8	9
Home Office	Furniture	10	11
Home Office	Furniture	14	15
Home Office	Technology	13	14
Home Office	Technology	14	15
Home Office	Office Supplies	13	14

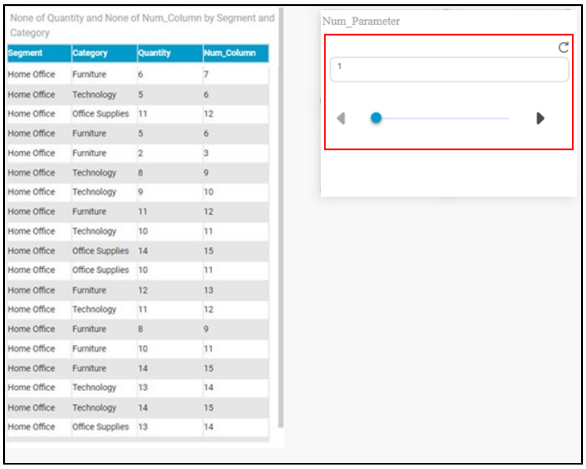
2. To apply the created Parameter, create the **Parameter widget**. Refer to Creating charts using widgets.
   In the example, we use the *Num_Parameter* as the *Parameter* of type Numerical. The Parameter widget displays the *Display Type* value as one (*1)* since it was the default value selected while creating the Parameter.

3. To change the value in the **Display Type** field, you have three options available, Click the down arrow next to *User Input* to view and select the options from the drop-down list.

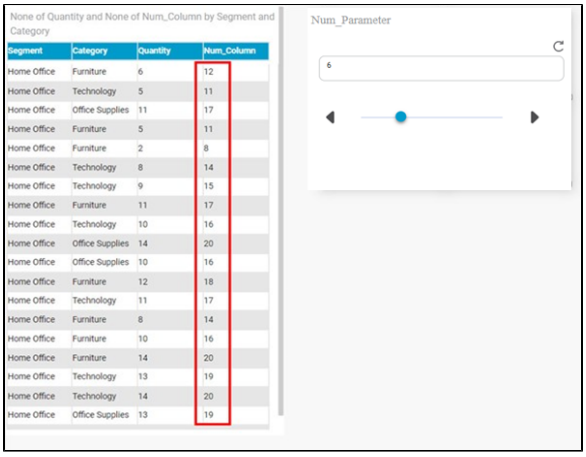


The table below describes how the Numerical Parameter value can be changed.

Field	Description	Remark
User Unput	It allows you to enter a value manually in the *Display Type* field.	• It is the Current value in the field. • When the Parameter widget is plotted, the Display Type field displays the Current value selected while creating the Parameter.
User Input – Up /Down Arrow	It allows you to operate the upward/downward arrows to increase /decrease the value in the *Display Type* field at a pre-decided increment frequency.	The pair of arrows appear in the Display Type field on the right.
Slider	It allows you to operate the upward/downward arrows to increase /decrease the value in the *Display Type* field at a pre-decided increment frequency.	When this option is selected from the drop-down, a slider is displayed in the Parameter widget.



4. To apply the parameter on the selected column, change the value in the **Display Type** field. In the example, we use the *slider* and change the value from 1 to 6.

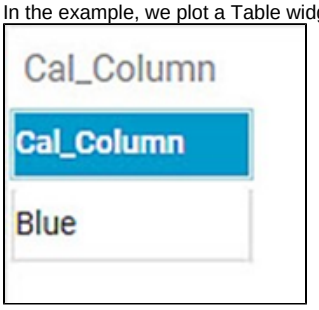


The corresponding values in the *Num Column* increase by Six. Since the Current value of the *Num_Parameter* is incremented by Six, each value in the *Num_Column* is incremented by Six.

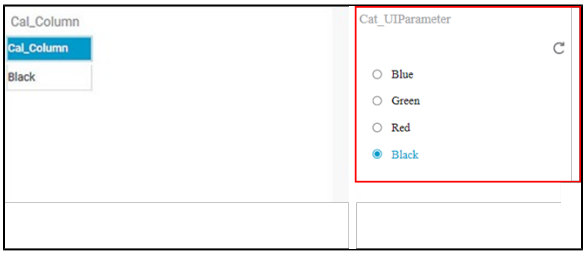
Using a Categorical Parameter

To use a created Categorical Parameter, follow the steps given below.

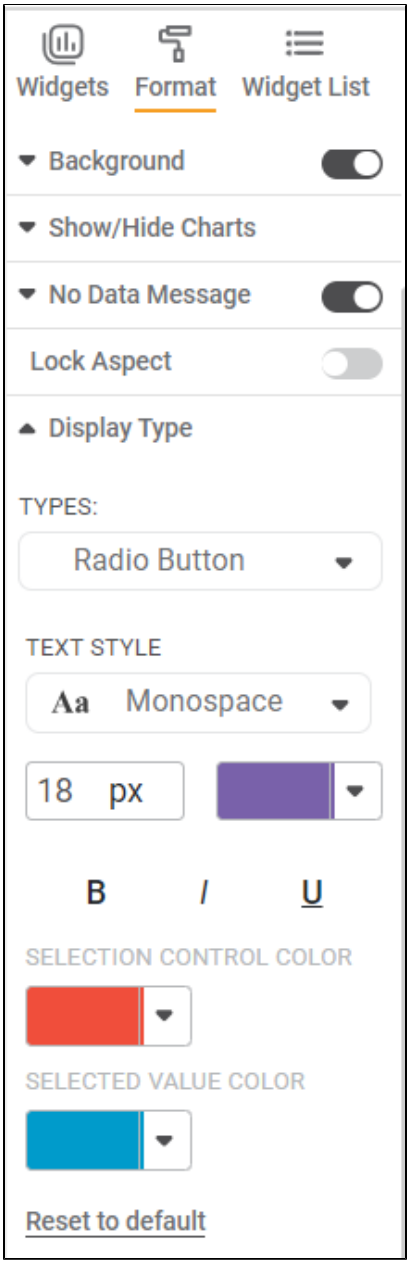
1. Plot a widget of your choice. Refer to *Creating charts using Widgets*.
   In the example, we plot a Table widget using the Categorical Parameter *Cat_Column* as the Configuration parameter.



2. To apply the created Parameter, create the **Parameter widget**. Refer to *Creating charts using Widgets*.
   This widget has only one parameter, which is the *Cat_UIParameter*.



The Parameter widget displays the *Display Type* value as *Black* since it was the Current value selected while creating the Parameter.

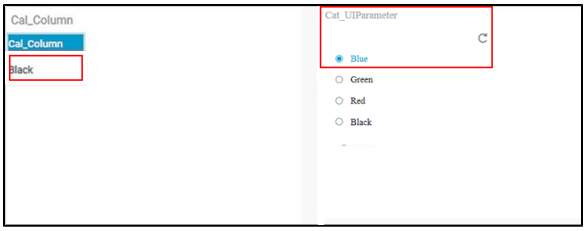


There are seven options available to change the value in the **Display Type** field. You can click the down arrow next to the *User Input* to view and select the options from the drop-down list.
The table below describes how the *Categorical Parameter* value can be changed.

Field	Description	Remark
User Input	It allows you to enter a value manually in the *Display Type* field.	• It is the Current value in the field. • When the Parameter widget is plotted, the Display Type field displays the Current value selected while creating the Parameter.
User Input – Up /Down Arrow	It allows you to operate the upward/downward arrows to increase/decrease the value in the *Display Type* field at a pre-decided increment frequency.	The pair of arrows appear in the Display Type field on the right.
Slider	It allows you to operate the slider dot or a pair of arrows on the two ends of the slider to change the value in the *Display Type* fi eld.	When this option is selected from the drop-down, a slider is displayed in the Parameter widget.
Single Value Drop Down	When selected, it creates a drop-down list from which you can select a value.	Only one value can be selected.

Radio Button	When selected, it creates a list of parameter values with a radio button assigned to each value.	Only one value can be selected.
Button	When selected, it creates list of parameter values with a button assigned for every value.	Only one value can be selected.
Toggle Button	When selected, it creates list of parameter values with a toggle button assigned for every value.	Only one value can be selected

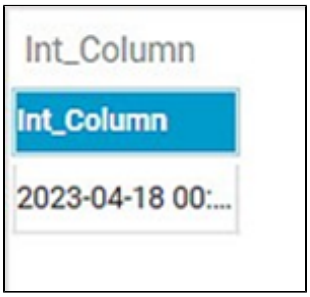
3. To apply the parameter on the selected column, change the value in the **Display Type** field. In the example, we use the *Radio Button* and change the value from *Black* to *Blue*. There is a corresponding change in the Calculated column in the Table widget.



Using an Interval Parameter

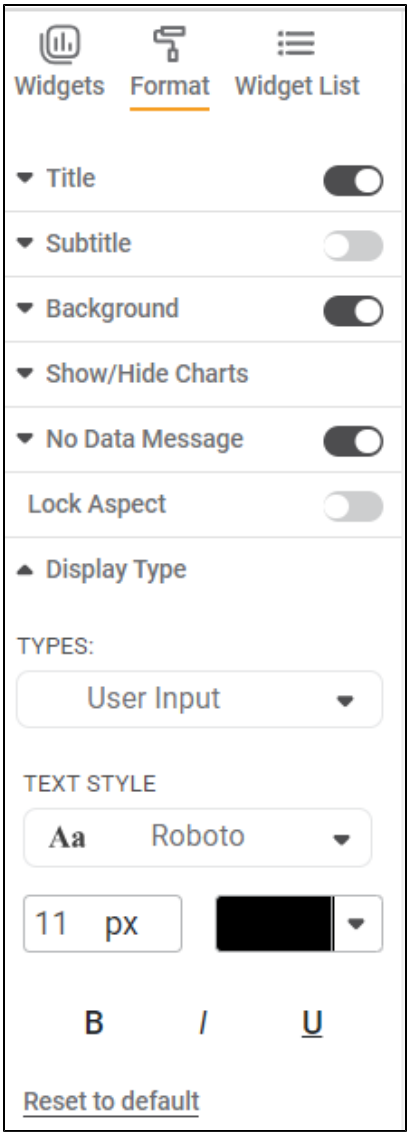
To use a created Interval Parameter, follow the steps given below.

1. Plot a widget of your choice. Refer to *Creating charts using Widgets*. In the example, we plot a Table widget using the Interval Parameter *Int_Column* as the Configuration parameter.



2. To apply the Parameter, create the **Parameter widget**. Refer to *Creating charts using Widgets*.
This widget has only one parameter, which is the *Int_Parameter*.

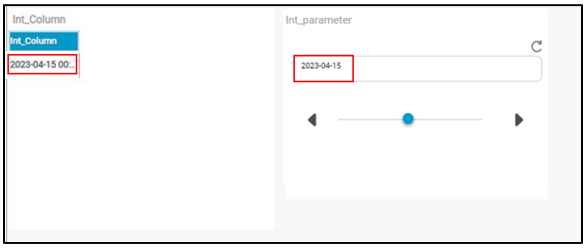
The Parameter widget displays the *Display Type* value as *2023-04-18* since it was the Current value selected while creating the Parameter.



There are two options available to change the value in the **Display Type** field. You can click the down arrow next to the *User Input* to view and select the options from the drop-down list.
The table below describes how the Interval Parameter value can be changed.

Field	Description	Remark
User Input	It allows you to enter a value manually in the *Display Type* field.	• It is the Current value in the field. • When the Parameter widget is plotted, the Display Type field displays the Current value selected while creating the Parameter.
Slider	It allows you to operate the slider dot or a pair of arrows on the two ends of the slider to change the value in the *Display Type* field.	When this option is selected from the drop-down, a slider is displayed in the Parameter widget.

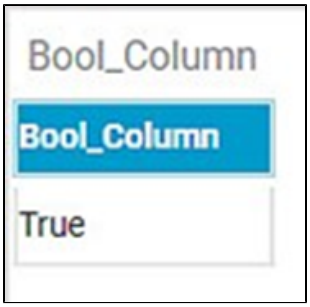
3. To apply the parameter on the selected column, change the value in the **Display Type** field. In the example, we use the *slider* and change the value from ***2023-04-18*** **to** ***2023-04-15***.
You will notice a corresponding change in the Calculated column in the Table widget.



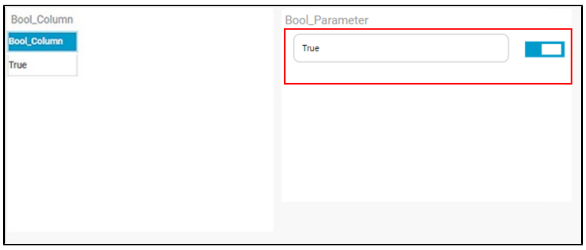
Using a Boolean Parameter

To use a created Boolean Parameter, follow the steps given below.

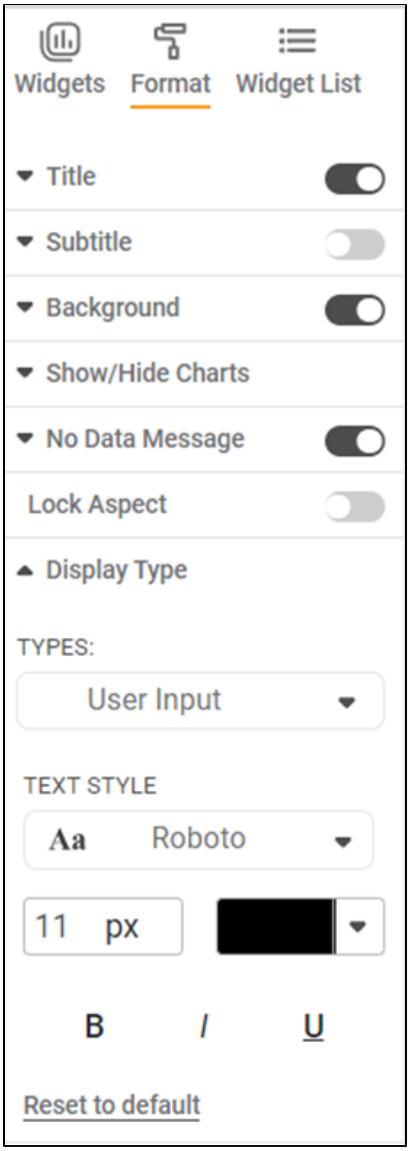
1. Plot a widget of your choice. Refer to *Creating charts using Widgets*.
   In the example, we plot a Table widget. We use the Boolean Parameter Bool_*Column* as the Configuration parameter.

2. To apply the Parameter, create the **Parameter widget**. Refer to *Creating charts using Widgets*.
   This widget has only one parameter, which is the *Bool_Parameter*.

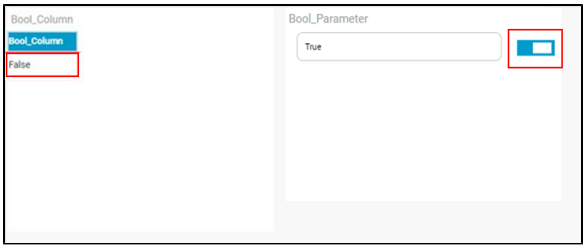
   The Parameter widget displays the *Display Type* value as *True* since it was the Current value selected while creating the Parameter.



There are two options available to change the value in the **Display Type** field. You can click the down arrow next to the *User Input* to view and select the options from the drop-down list.
The table below describes how the Boolean Parameter value can be changed.

Field	Description	Remark
User Input	It allows you to enter a value manually in the *Display Type* field.	• It is the Current value in the field. • When the Parameter widget is plotted, the Display Type field displays the Current value selected while creating the Parameter.
Toggle Button	It allows you to operate the toggle button ( ) to change the value.	

3. To apply the parameter on the selected column, change the value in the **Display Type** field.
   In the example, we use the *Toggle Button* and change the value from *True* to *False*.
   You will notice a corresponding change in the Calculated column in the Table widget.



Notes	• If there is more than one widget on a Dashboard page, the selected Parameter can be applied to only those widgets plotted using the Calculated Column. • Those widgets which do not contain the Calculated Column remain unaffected even after altering the Parameter value from the Parameter widget.

Your Rating:

Table of Content

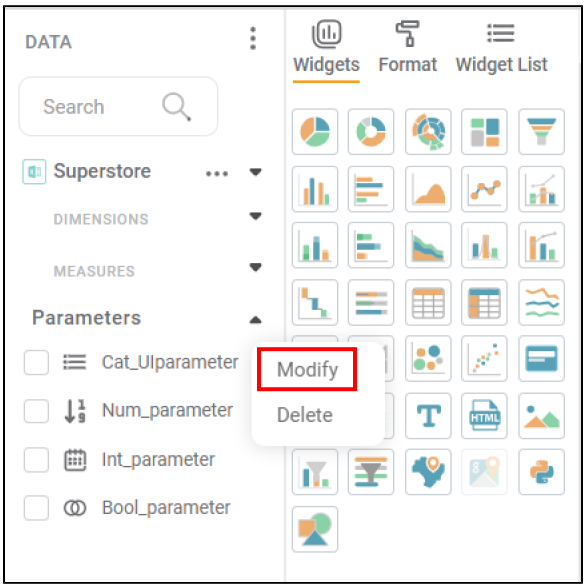
- Using a Numerical Parameter
- Using a Categorical Parameter
- Using an Interval Parameter
- Using a Boolean Parameter

Modifying a Parameter

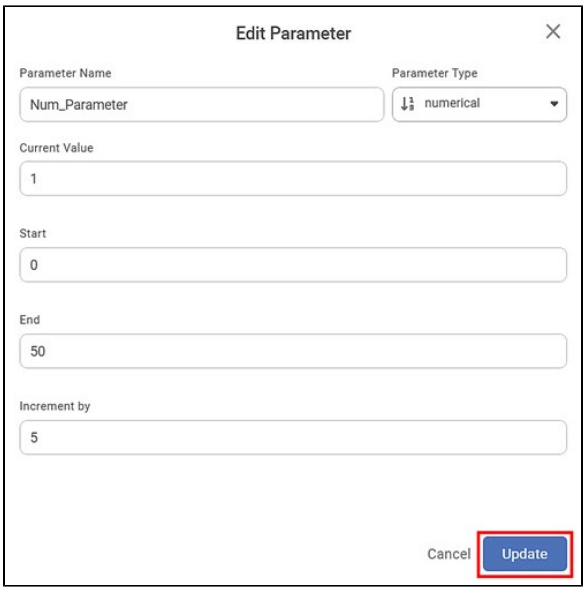
While using a Parameter, it is sometimes observed that the values selected while creating the Parameter are not selected correctly or need to be changed. In that case, we can use the *Modify* option to make the necessary changes to the Parameter.

To modify a Parameter, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to *Editing a Dashboard*.
   The dashboard is displayed.
2. In the **DATA** pane, click the **Parameter** drop-down.
3. Hover over the required Parameter, click the ellipsis (•••), and then click **Modify**.



   The *Edit Parameter* page is displayed.
   This page contains the same fields as the *Create Parameter* page for the corresponding Parameter Type.
4. Modify the values in the fields as required and click **Update**.



   The Parameter is modified, and the updated Parameter is displayed in the DATA pane.
   Upon saving and refreshing the dashboard, the widgets gets updated.

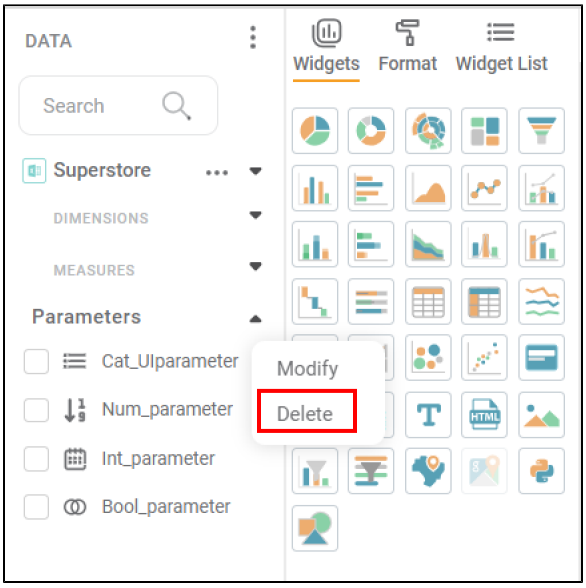
Note:	You can abort the modification of a *Parameter by* using the *Cancel* option. The Parameter remains unchanged, and you are navigated back to the Dashboard page.

Your Rating:

Deleting a Parameter

You can delete a Parameter from the Dashboard if it is no more required. To delete a Parameter, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to *Editing a Dashboard*.
   The dashboard is displayed.
2. In the **DATA** pane, click the **Parameter** drop-down.
3. Hover over the required Parameter, click the ellipsis (***), and then click **Delete**.



   A message to confirm your action is displayed.
4. Click **Delete**.
5. The Parameter is deleted, and a confirmation message is displayed. The Parameter no longer appears in the *Parameters* list.

Your Rating:

Performing Miscellaneous Tasks

Along with formatting charts and axes, there are a few miscellaneous tasks that you can perform on your dashboard, as listed below.

- Update Name and Description of Dashboard
- Add Comments to Dashboard
- Use Annotations in the Dashboard

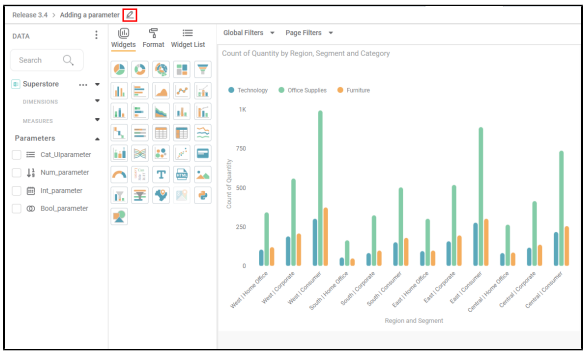
These tasks are explained in the following sections.

Your Rating:

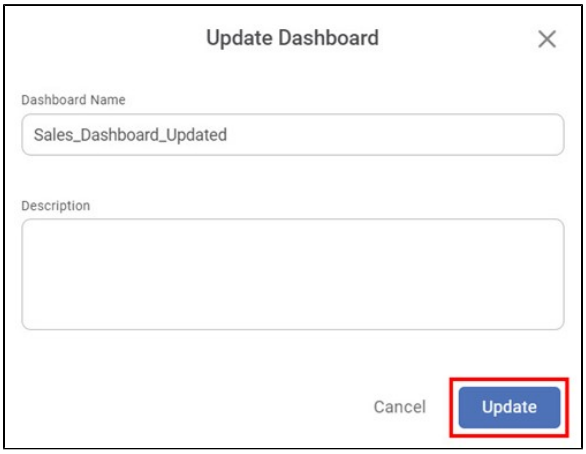
Updating Name and Description of a Dashboard

Updating a dashboard helps you retain the most recent information related to it. You can update the name and the description of the dashboard. To update a dashboard, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard.
   The Dashboard is displayed.
2. On the title bar, click the **Update** dashboard icon ( ).



   Update Dashboard window is displayed.
3. Change the **Dashboard Name** and **Description**.
4. Click **Done**.



   The dashboard information is updated.

Your Rating:

Adding Comments to a Dashboard

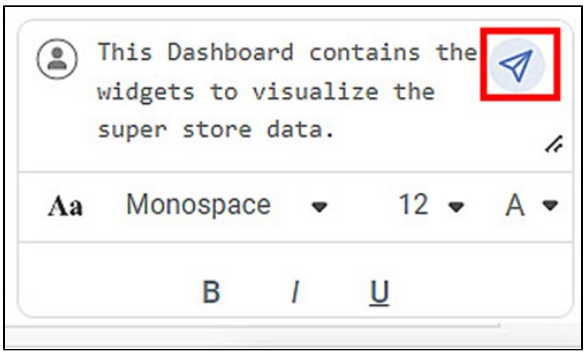
Adding Comments to a Dashboard

Adding comments to a dashboard helps you store important explanations about it and convey your message and information regarding the dashboard to other users.
You can add comments to a dashboard in both the V*iew Mode* and the E*dit Mode*.
To add comments to a dashboard, follow the steps given below.

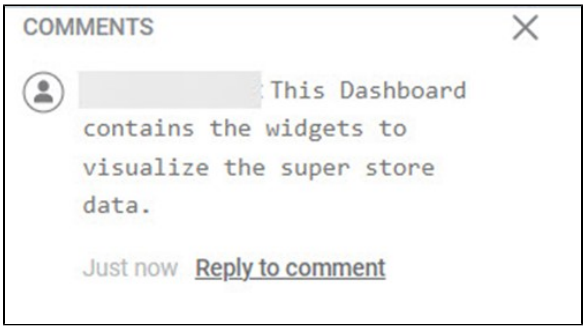
1. Open the **Dashboard** in edit mode or view mode. Refer to Editing a Dashboard or Viewing a Dashboard.
   The Dashboard is displayed.
2. On the function pane, in the top right corner, click **Comment**.
   The *COMMENTS* pane is displayed.
3. Type your comment in the **Add comment** field.

Notes:	• Comments on dashboards currently do not support non-ASCII characters and some special characters like forward-slash, backward slash, and double inverted commas (" "). • If any of these characters are present in the comment, they will be replaced with a single blank space. • You can also use different formatting options that are available to format your comment.

4. Click the **Send** ( ) icon.



The comment is displayed in the same comment pane.



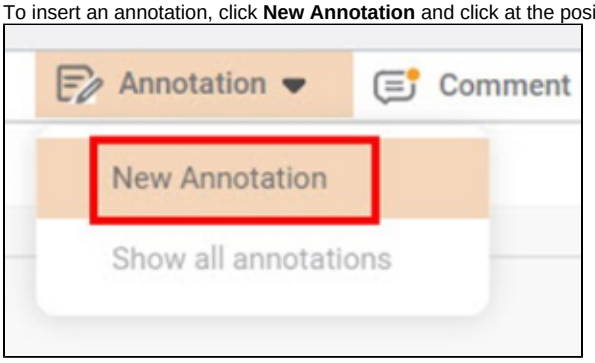
Note:	• You can reply to the comments added by other users. Click *Reply to comment*. • You can also delete an unwanted comment. Hover over the added comment and click the *Delete* icon ( ).

Your Rating:

Using Annotations on a Dashboard

Annotations are used to add more information in a widget. The annotations are added in the form of numbers and text.
To annotate a dashboard, follow the steps given below.

1. Open the **Dashboard** in edit mode. Refer to Editing a Dashboard.
   The Dashboard is displayed.
2. On the function pane, in the top right corner, click **Annotation**.
3. To insert an annotation, click **New Annotation** and click at the position where you want to add the annotation.



4. Enter the annotation text in the text field and click **Save**.

Note:	You can also use different formatting options that are available to format your annotation text.

The annotation number is added to the chart. You can click the annotation number to view the saved annotation text.

Notes:	• You can add any number of annotations to a chart. • You can click and drag the annotation number on a chart and change its position as required. • You can edit the annotation. Click the annotation number, and hover over the annotation text, and then click the *Edit* icon. • You can delete the annotation. Click the annotation number, and hover over the annotation text, and then click the *Delete* icon. • On the dashboard, you can choose to show or hide the annotations. To do so, On the function pane, click *Annotation* and then click *Show all annotations*. The annotations are shown or hidden depending upon the status of the option.

Your Rating: