
Chapter 3: Creating and Managing Components


If you have the permissions to do so, you can edit components in place while looking at them on your dashboard, or by using the Visual Designer. This chapter shows you how to create and edit each of these components.

Editing in Place vs. The Visual Designer

There are two mechanics for creating and editing your components: editing in place and the Visual Designer. Both offer you access to the same editors and action menus, and function nearly identically. The chief difference between the two is that you cannot create perspectives, edit empty perspectives, nor create or edit calendars while editing in place. While editing in place, however, you can edit dashboards and widgets from the same screen and see your changes in context as you make them.

To create a perspective and add its first dashboard, you must use the Visual Designer. After that, you can edit the perspective and add or remove dashboards by editing in place.

Accessing Edit in Place

To begin editing in place, click Edit  in the upper right of the screen. The various editor and action menus available appear on the left side of the screen, and the Components Library appears, collapsed, on the right. To expand the **Components Library**, click Expand



Accessing the Visual Designer

To access the Visual Designer, from the **Options** drop-down menu, select **Visual Designer**, as shown in Figure 13.

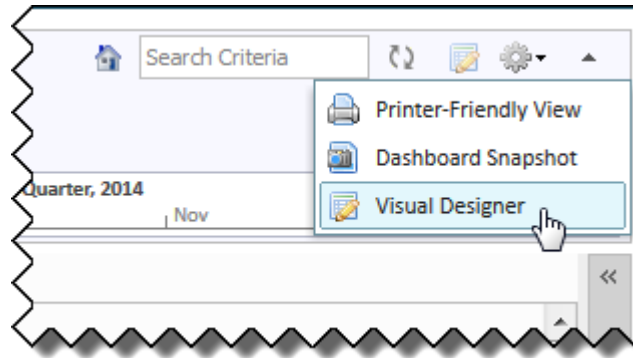


Figure 13: Selecting Visual Designer.

This guide focuses on editing in place, but the editors all work similarly in the Visual Designer screen.

Editing Overview

There are several basic areas when you are editing in place.

Context Pane

The **Context Pane** is the same as it was before you started editing. It sits at the top of the screen and tells you the perspective, level, and period you are looking at. In Figure 14, the

Context Pane indicates that the **Company Summary** perspective is loaded, and is showing the top level for January 2012. A sample of this appears in Figure 14.

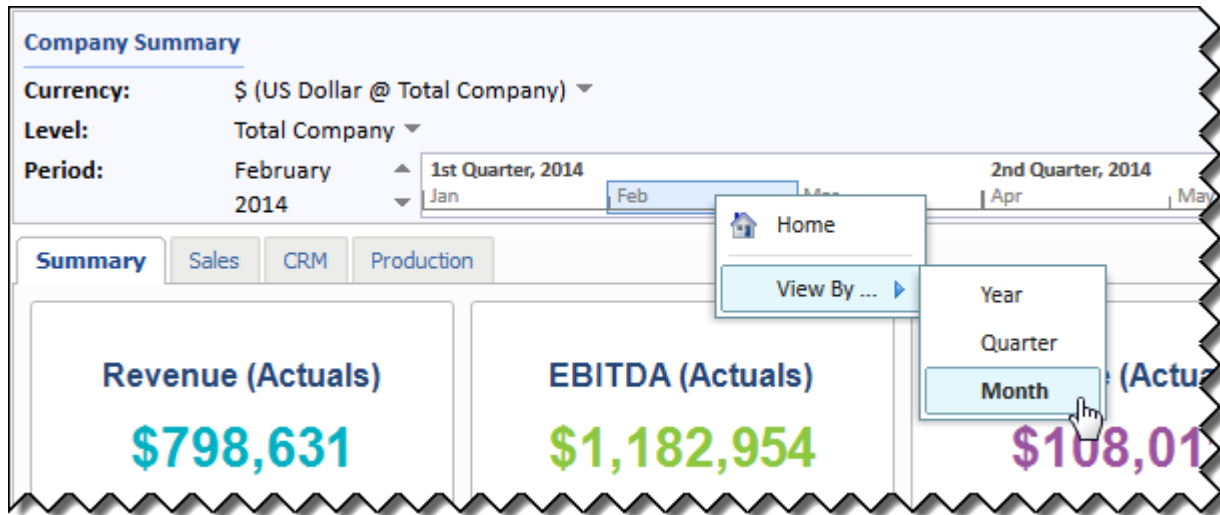


Figure 14: The **Context Pane**, expanded.

The Context Pane also lets you change the time period shown in the components you are editing and filter the data shown. See “Understanding Dashboards and Perspectives” on page 8. for more.

Component Library


The **Component Library** is a collapsible menu on the right side of the screen, and it contains all the widgets, ribbons, and dashboards to which you have access. It also gives you the option to create new components. (The **Components** menu on the Visual Designer serves the same function, but displays perspectives as well.)

Both menus show components sorted by types (perspective, dashboard, ribbon, and widget), and the menu displays only one type of component at a time. To switch between components, click the buttons at the top of the menu. If you are unsure which button is which, mouse over the buttons to display tooltips telling you which component each represents. The Visual Designer component buttons are shown in Figure 15.



Figure 15: Component buttons in the Visual Designer.

You can scroll down to find the component you want or you can use the search bar. Click a component in the **Components** menu to open it in the editing area, or click the component in place if you’re using edit-in-place (a grey shadow appears around the component you have selected).

On the right side of the **Component Library and Components** menu tool bars, there is a button for **Calendars** . This lets you access the **Time Structure** editor.

Editors Menu

After you have selected a component for editing, the **Editors** menu (shown in Figure 16) updates with editing options. The editors that appear depend on what applies to the selected component and if you have the permissions to edit the component. (For many components, you can only edit their display name.) If no editors appear, you do not have the necessary permissions to edit the selected component.

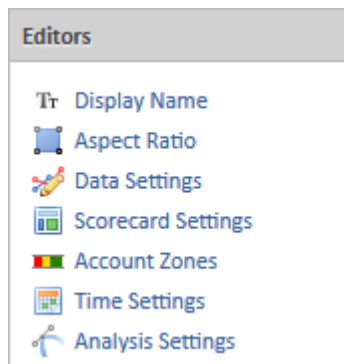


Figure 16: The **Editors** menu.

Display Name

This editor lets you change the name of the component. The display name appears at the top of the component (for example, a dashboard's display name is on its tab, a ribbon's display name is in its title bar, and so on) and is used to refer to it in the **Components** menu.

Special characters are not supported in display names.

Aspect Ratio

This editor only appears in the Visual Designer.

Set how wide you want the widget to be in relation to its height. The options are 1 x 1, which makes it a square; 2 x 1; 3 x 1; 4 x 1; 5 x 1; and 6 x 1.

On a freeform dashboard, you can change the height and width manually by clicking and dragging the edges of widgets.

Data Settings

Choose the data to show on the widget and what appearance you want each data series to have using the **Data Settings** editor (shown in Figure 17).

The screenshot shows the 'Data Settings Editor' window with the 'Data Settings' tab selected. The window is divided into two main sections: 'Select series:' on the left and 'Modify the 'Dial Series' settings:' on the right. The 'Select series:' section contains a list of series: 'sales (Actual)' and 'Sales - calculated (Actual)'. Below the list are 'Add' and 'Delete' buttons. The 'Modify the 'Dial Series' settings:' section contains a 'Data Settings' tab and an 'Appearance' tab. The 'Data Settings' tab is active, showing settings for the selected series: 'Enabled' (checked), 'Metric' (sales), 'Name' (sales), 'Short Name' (sales), 'Version' (Actual), 'Data Filter' ((None)), 'Series Y Axis' (Primary), and 'Display Units' (\$ (###0)). Below these settings are fields for 'Break down data by:' (Time), 'Category Dimension:', and 'Value Dimension:', each with a dropdown menu and a 'Pinned' checkbox. At the bottom right are 'Apply' and 'Close' buttons.

Figure 17: The **Data Settings** tab in the **Data Settings** editor.

Depending on the widget, you can add up to ten series of data. A series can be an account, level, metric, or other set of data.

For users with access to more than one disparate level (that is, levels in different places of the Organization Structure), a synthetic level is shown that refers to all those users' levels in one place.

Use the arrows in the **Select series** section of the editor to change the order of series (this affects the order in which they overlap in some widgets, like area and line charts). Click **Add** or **Delete** to add or delete series.

You can add up to ten series of data in the data editor. Some widgets have a limited number of series they can display. Those widgets always display that number of series, starting from the top. You can still add up to ten series while editing those widgets, then rearrange the series' order so that the ones you want are displayed.

Click a series to edit it. For each series, you can choose:

- Which version to display (actuals, a specific plan version, or **From version selector**, meaning whatever version the user selects while viewing the widget).

If the actuals version is selected, the **Zone Version** field appears where you select the plan version to be used for calculating zones (see “Account Zones” on page 49).

- Which **Account** you want the data to come from.
- The **Name** and **Abbreviation** to be used for the account on the widget itself (these autopopulate with the name and short name of the account, but you can change them if you like).



Note: Administrators can create short names for accounts, versions, levels, dimensions, and dimension values. These short names are then used in Mumbleware as labels in widgets rather than the whole name. Any changes made to the **Abbreviation** field apply only in Mumbleware, and do not change the short name of the account.

- A **Data Filter** (optional).
- Whether the **Series Y Axis** is Primary (appears on the left side) or Secondary (appears on the right side). This is particularly useful if the widget displays series that use different units (for example, a monetary series and a percentage series)
- What **Display Units** you want the series to use.

Although there are default units associated with accounts, you can select different units to display data in. The selections are filtered based on the type of metric. When you click the down arrow in **Display Units**, the Current Metric Settings screen (shown in Figure 18) appears.

Figure 18: The **Current Metric Setting** screen.

If the Display Unit has a value set for family, type, and unit format, the values appear in the fields on this screen.

Checking **Follow Metric Default** sets the family, type, and unit settings to read-only and set the values to the default unit for the metric. Unchecking **Follow Metric Default** lets you select different unit display formats. When you click Apply, the units appear in the updated format.

The **Appearance Tab** allows you to set the appearance of each series of data. You can use the default settings or adjust them to customize your widget.

On the **Appearance Tab**, you can set:

- **Series Type:** The format the series appears in (for example, a line or an area).

- **Series Color:** The color of the data. Choose from company preset colors or from a standard palette.
- **Series Shadow:** Select whether the series should have a shadow or not.
- **Marker Size:** Choose the size of the markers for each series of data.
- **Marker Style:** Assign different shaped markers to different series of data.
- **Line Width:** *Line widgets only.* Set the width in pixels of the line representing the data.
- **Line Style:** *Line widgets only.* Set whether the line representing the data is solid, dashed, dotted, or a combination.
- **Column Width:** *Column widgets only.* Set the width of the column as a percentage of the data point interval.
- **Column Style:** *Column widgets only.* Set the appearance of the column from options including flat, cylinder, and fade.

Once you have the series set up, you have a set of choices that affect the widget as a whole:

- **Break down data by:** This selection determines how the data of each series is broken down. Your options are:
 - **Time:** Puts time along the X axis and value on the Y axis.
 - **Category dimension:** Uses whatever you choose in the Category dimension drop-down along the X axis.
 - **Account:** Puts accounts on the X axis and monetary value on the Y axis. Useful for comparing different departments' performance, for example.
 - **Time and Value Dimension:** Puts time on the X axis and whatever you select in the Value dimension drop-down on the Y axis. Also used when creating stacked column charts (see "Stacked Column Chart" on page 110).
 - **Category and Value Dimension:** Puts whatever you choose in the **Category** dimension drop-down on the X axis and whatever you choose in the **Value** dimension drop-down on the Y axis.
- **Category dimension:** If you choose to break down data by category, this is where you specify which category dimension to use.
- **Value dimension:** Offers you a choice of all accounts, levels, and dimensions in your model.

The **Pinned** check boxes let you "pin" your selection so that the widget won't change even if a user changes the context for the dashboard it's on. For example, if you set the **Category** dimension to a particular level, a user viewing the widget can change that level by changing the level in the **Context Pane**. Checking the **Pinned** check box next to the **Category** dimension drop-down causes that selected level to stay the same regardless of changes made in the **Context Pane**.

The **Labels** tab (line, area, and column widgets only) lets you specify the settings for the selected series' labels. Its fields are:

- **Show Data Labels:** Select whether to display data labels on the widget.
- **Label Position:** Set the data label position relative to the data points.
- **Label Type:** Select between Data values, Percentage of total value, and X-axis label.

- **Label Precision:** Set the decimal point precision of the data labels.

The **Y Axis** tab appears only if the widget is in dual or multi-chart mode. It lets you specify the settings for the Y axis of the selected series.

- **Y Axis Scale:** Select between **Auto** and **Manual**.
- **Y Start From Zero:** *Auto only.* Specify whether the Y axis starts at zero.
- **Y Axis Maximum:** *Manual only.* Specify the highest point on the Y axis.
- **Y Axis Minimum:** *Manual only.* Specify the lowest point on the Y axis.
- **Y Axis Interval:** *Manual only.* Specify the interval of marks on the Y axis.

The **Empty Points** tab (line, area, and column widgets only) lets you specify the settings for how the selected data series displays data points for which there is no value.

- **Show Empty Points:** Select **Yes** to display empty points, **No** to hide them.
- **Empty Point Value:** Select **Average** to assign the average of the points on either side of the empty point to the empty point, or select **Zero** to assign a value of zero to empty points.
- **Color:** Select a color for empty points.
- **Line Style:** Select a line style to use when the series contains empty points.
- **Marker Style:** Select a marker style for empty points.

Grid Widget Column Properties

Although this does not appear as a window in the **Editors** menu, it serves a similar function to the **Data Settings** editor. To access this window, mouse over the heading of a column and click the drop-down arrow (shown in Figure 19).

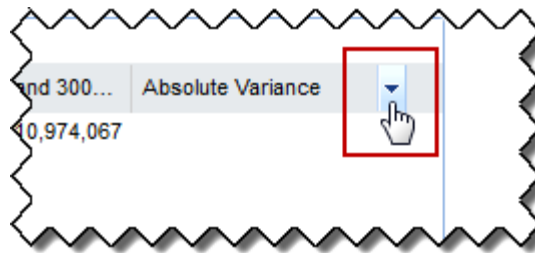




Figure 19: The drop-down arrow for accessing the **Column Properties** editor.

The **Column Properties** editor has three tabs:

- **Data** (varies depending on the column type)
 - **Name:** The full name of the column.
 - **Short name:** The abbreviated name of the column, used when **Short Name** is selected in **Header display** or when the column is too narrow for the full name to fit. If no short name is specified for the account or metric, the system generates one automatically.
 - **Header display:** Choose whether columns default to the full name or the short name.
 - **Reference:** The first number in the variance calculation.

- **Comparison:** The second number in the variance calculation.
- **Formula:** This automatically displays the formula created by the drop-down selections above it.
- **Version:** Select the version the column references.
- **Units:** Select the units for the column, or leave it set to the default.
- **Summary Row:** If a summary row has been placed in the grid, select what it displays for this column.
- **Show zone:** If zones have been set up for this data series, check this box to enable them for the grid.
- **Expression:** Click **Edit Expression**  to enter a formula for this column.
- **Display**
 - **Alignment:** Select the alignment for the cells in the column.
 - **Foreground color:** Select the color for text and symbols in the column.
 - **Background color:** Select the color for the background of the cells in the column.
 - **Format:** Make the column text bold, italic, or underlined.
 - **Border Sides:** Select the borders that should appear around the column's cells.
 - **Border Format:** Select the type of border the column should have.
 - **Border Color:** Set the color of the column's border.
- **Conditional Formatting**
 - The editing window at the top is where the list of format rules are displayed. To add a format rule, click **Add**, then click **Edit**  for the new entry. The **Expression** dialog appears, where you can enter a format rule.
 - The lower section includes all the editors from the Display tab except for Alignment. To set a format rule's format properties, click it in the list, then edit the various display options.





Note: Format rules are applied in the order in which they appear in the list. To change the order of the list, highlight the rule you want to move, then click the up and down arrows   to move it up or down in the list.

Chart Settings

Set the properties of the widget, including font size and legend style. The tabs and fields displayed vary from widget to widget. The possible fields are as follows:

- **Chart tab**
 - **Default Chart Type:** Set the chart type to be used when the widget series (Data Settings Editor > Appearance Tab > Series Type) is set to **Default Chart Type**.
 - **Chart Display Format:** Choose between 2D and 3D.
- **Chart Area tab**
 - **Chart Areas:** Choose whether to display the series on a single chart, a dual chart (two charts), or multiple charts (one chart per series).
- **Font**
 - **Font:** Select the font to use in the chart.
 - **Size:** Select the font size to use in the chart.

- **Style:** Choose among **Standard**, **Bold**, **Italic**, or combinations of the three.
- **Color:** Choose a color for the text in the chart.
- **Show Border:** Select whether to show a border around the chart.
- **Show Background:** Select whether to show a background color on the chart.
- **Back Start Color:** If **Show Background** is set to **Yes**, select a color for the background to start as.
- **Back End Color:** If **Show Background** is set to **Yes**, select a color for the background to gradient fade to from the **Start Color**.
- **Back Gradient:** If **Show Background** is set to **Yes**, select whether to use a gradient on the background and if so, what direction the gradient runs.
- **Y Axis tab**
 - **Y Axis Scale:** Select between **Auto** and **Manual**.
 - **Y Start From Zero:** *Auto only.* Specify whether the Y axis starts at zero.
 - **Y Axis Maximum:** *Manual only.* Specify the highest point on the Y axis.
 - **Y Axis Minimum:** *Manual only.* Specify the lowest point on the Y axis.
 - **Y Axis Interval:** *Manual only.* Specify the interval of marks on the Y axis.
 - **Y Axis Title:** Specify the title to appear along the Y axis. If you select **Custom Name**, enter the title you want in the next field.
 - **Y Custom Title:** If **Y Axis Title** is set to **Custom Name**, enter the custom name here.
 - **Y Interlaced Grid:** Choose whether to have the background of the chart display a grid along the Y axis. If a color gradient is set on the **Chart Area** tab, the gradient will increment according to the grid.
 - **Y Major Gridlines:** If set to **Yes**, lines will appear for the intervals on the Y axis.
 - **Y Minor Gridlines:** If set to **Yes**, lines will appear subdividing the intervals on the Y axis.
- **Y2 Axis tab:** Controls the Y axis on the right hand side of the chart. This tab only appears you selected **Secondary** on the widget series (Data Settings Editor > Data Settings Tab > Series Y Axis)
 - **Y2 Axis Scale:** Select between **Auto** and **Manual**.
 - **Y2 Start From Zero:** *Auto only.* Specify whether the Y axis starts at zero.
 - **Y2 Axis Maximum:** *Manual only.* Specify the highest point on the Y axis.
 - **Y2 Axis Minimum:** *Manual only.* Specify the lowest point on the Y axis.
 - **Y2 Axis Interval:** *Manual only.* Specify the interval of marks on the Y axis.
 - **Y2 Axis Title:** Specify the title to appear along the Y axis. If you select **Custom Name**, enter the title you want in the next field.
 - **Y2 Custom Title:** If **Y Axis Title** is set to **Custom Name**, enter the custom name here.
 - **Y2 Interlaced Grid:** Choose whether to have the background of the chart display a grid along the Y axis. If a color gradient is set on the **Chart Area** tab, the gradient will increment according to the grid.
 - **Y2 Major Gridlines:** If set to **Yes**, lines will appear for the intervals on the Y axis.

- **Y2 Minor Gridlines:** If set to **Yes**, lines will appear subdividing the intervals on the Y axis.
- **X Axis tab:** Controls the X axis on the widget.
 - **Offset Labels:** Alternates positions of the X axis labels. Useful if the labels are long.
 - **Label Angle:** *Non-offset labels only.* Select the angle of the X axis labels in degrees.
 - **Label Interval:** Set to Auto or select the interval for the X axis labels.
 - **Auto Fit Labels:** Select whether the system should shrink the labels to fit or not.
 - **Label Format:** Select whether the X axis labels should be consecutive numbers or not.
 - **Label Text:** Select whether to use the series short name or long name in the X axis labels.
 - **Major Gridlines:** If set to **Yes**, lines will appear for the intervals on the X axis.
 - **Minor Gridlines:** If set to **Yes**, lines will appear subdividing the intervals on the X axis.
- **Legend tab:** Controls the appearance of the widget's legend.
 - **Type:** Select a Standard, Short Summary Table, or Long Summary Table for the legend.
 - **Legend Text:** Select what the legend will display for each series.
 - **Position:** Select the legend's shape and location.
 - **Font:**
 - **Font:** Select the font to use in the legend.
 - **Size:** Select the font size to use in the legend.
 - **Style:** Select among **Standard**, **Bold**, **Italic**, or combinations of the three.
 - **Color:** Select a color for the text in the legend.
 - **Border:** Specify whether the legend has a border or not.
- **Custom tab**
 - **Column Position:** *Column charts only.* Select whether the columns appear side by side or superimposed on each other.

Scorecard Settings

The **Scorecard Settings** editor (shown in Figure 20) appears when you are editing a scorecard widget. It defaults to the most commonly-used settings, so you don't need to change anything here unless you want to.

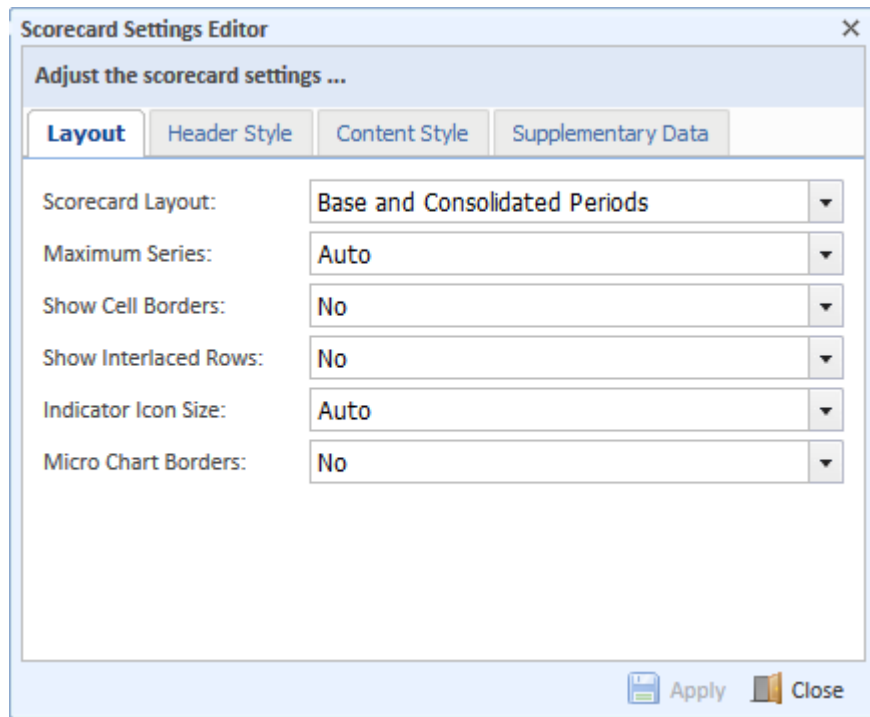


Figure 20: The **Layout** tab of the **Scorecard Settings** editor.

Layout Tab

The **Layout** tab gives you control over how the elements in the scorecard are formatted and arranged.

- **Scorecard Layout:** Select the arrangement of the elements within the scorecard. Examples of each at the full 6x1 width are given in "Scorecard Layouts" on page 133.
Default: **Base and Previous Periods**.
- **Maximum Series:** Set the maximum number of series of data (rows) which can be included on the scorecard. Set a specific number, or let the application display as many as fit (auto).
Default: **Auto**.
- **Show Cell Borders:** Choose whether to show the cell borders in the scorecard.
Default: **No**.
- **Show Interlaced Rows:** Whether to show alternate rows in grey and white.
Default: **No**.
- **Indicator Icon Size:** Sets the display size of the zone and trend icons. Choose **Auto** to let Mumbleware pick which size fits, based on the number of rows in the scorecard.
Default: **Auto**.

- **Micro Chart Borders:** Whether to show borders around the micro chart(s) in the scorecard.
Default: **No**.

Header Style Tab

Change the look and style of the Scorecard's header.

- **Header Back Color:** Set the background color of the header row. Select **Default** to use the company color.
Default: **(Default)**
- **Header Font Size:** Set the size of the text in the header row.
Default: **8**
- **Header Font Style:** Set the font style of the header row.
Default: **Bold**
- **Header Font Color:** Set the color of the text in the header row. Select **Default** to use the company color.
Default: **(Default)**
- **Metric Header Text:** Set the label for the **Metric** field.
Default: **Account**
- **Metric Header Tooltip:** Set the tooltip text for the **Metric** field.
Default: **Account**
- **Budget Header Text:** Set the header text for the **Plan** field.
Default: **Plan**
- **Micro Chart Header:** Set the header text for the micro chart.
Default: **Micro Chart**

Content Style Tab

Change the look and feel of the text content of the scorecard.

- **Data Font Size:** Set the font size for data in the scorecard.
Default: **8**
- **Data Font Style:** Set the font style for data in the scorecard.
Default: **Standard**
- **Data Font Color:** Set the color for the data text in the scorecard.
Select **Default** to use the company color.
- **Name Text:** Choose whether the rows label should be the full display name, abbreviated display name, or default (this setting uses the full display name when there is room for it, and the abbreviated display name otherwise).
Default: **Default**
- **Name Font Size:** Choose the font size of the row labels.
Default: **8**.
- **Name Font Style:** Choose the font style of the row labels.
Default: **Standard**
- **Name Font Color:** Choose the font color for the row labels.
Select **Default** to use the company color.

Supplementary Data Tab

Change the look and behavior of the indicators, micro chart, and other data visualization in the scorecard.

- **No Zone Indicator:** When there is no zone defined for a data point on the scorecard, display either no zone indicator or a Good indicator.
Default: None
- **Trend Indicator Period:** Choose the period for the trend indicator.
Default: Consolidated Period
 - If **Base Period** is selected, the widget's base period is used to determine trends (the widget's base period can be fixed with the Time Settings editor, or set to use the time period chosen in the **Period Selector**).
 - If **Consolidated Period** is selected, the widget's consolidated time period is used to determine trends (if the widget's time period is Month, the consolidate period is Quarter or Year. Thus, the widget would look at the current quarter or current year to determine the trend. Consolidated periods are set in the Time Structure).
 - If **Historical Period** is selected, the previous consecutive periods is used to determine trends (if the widget's time period is Month, then the previous n months is used, where n is set in the Time Structure).
- **Micro Chart Period:** Choose the period for the micro chart. Default: Consolidated.
 - If **Base Period** is selected, the widget's base period is used to determine trends (the widget's base period can be fixed with the Time Settings editor or set to use the time period chosen in the **Period Selector**).
 - If **Consolidated Period** is selected, the widget's consolidated time period is used for the micro chart (if the widget's time period is Month, the consolidated period is Quarter or Year. Thus, the micro chart displays the current quarter or current year).
 - If **Historical Period** is selected, the previous consecutive periods are used for the micro chart (if the widget's time period is Month, then the previous n months appear in the micro chart, where n is set in the Time Structure).
- **Micro Chart Type:** Choose the type of chart used for the base micro chart.
Default: **Outline**.
- **Summary Type:** Choose the logic applied for data summary.
Default: **Average**.
- **Variance Type:** Choose between **Actual Variance** (a numerical amount) or **Percentage Variance** in the Variance column.
Default: **Actual Variance**.
- **Previous Period:** Choose between sequential (for example., the previous month for a scorecard looking at a month) and comparable (for example, the same month the previous year for a scorecard looking at a month, which is governed by the widget's Time Structure.).
Default: **Previous Sequential Period**.
- **Consolidated Data Range:** Choose to show data for period-to-date or for the total period if **Consolidated Period** is selected in the **Micro Chart Period** or **Trend Indicator Period** settings.
Default: **Show data for period to date**.

Custom Scorecard Settings

Custom scorecards use a scorecard layout, but you have a great deal of flexibility in what information you display and how it appears. For example, the custom scorecard can compare Forecast to Budget versions, current year Actuals to last year Actuals, and so on. You can also rearrange the order of the display columns and the display settings of the data in the scorecard.

A sample custom scorecard appears in Figure 21. Custom scorecards have three sections. Each section can have from one to seven columns, which can contain a wide variety of information, such as value, variance, variance percentage, zone, trend, or microchart.

Sample Custom Scorecard											
Account	Month			QTD				YTD			
	May 2015 Actual	May 2015 Budget	May 2015 Variance	Q2, 2015 Micro Chart	Q2, 2015 Actual	Q2, 2015 Budget	Q2, 2015 Variance	2015 Micro Chart	2015 Actual	2015 Budget	2015 Variance
1100 Current Assets	\$7.5 M		\$7.5 M		\$7.5 M		\$7.5 M		\$7.5 M		\$7.5 M
3900 Net Income	\$0	-\$1.3 M	\$1.3 M		-\$202.5 k		-\$202.5 k		\$219 k		\$219 k
5510 Product COGS	\$0	\$615.3 k	-\$615.3 k		\$0	\$1.2 M	-\$1.2 M		\$1.4 M	\$3 M	-\$1.6 M
6000 Operating Expenses		\$700.6 k	-\$700.6 k		\$522.8 k		\$522.8 k		\$2.7 M		\$2.7 M

May 2015

Figure 21: Sample custom scorecard.

Many of the custom scorecard editors are similar to the editors for other widgets, but there are some significant differences. This section describes the editors specific to custom scorecards.

Data Settings Editor

You add rows to a custom scorecard using the Data Settings editor (shown in Figure 22).

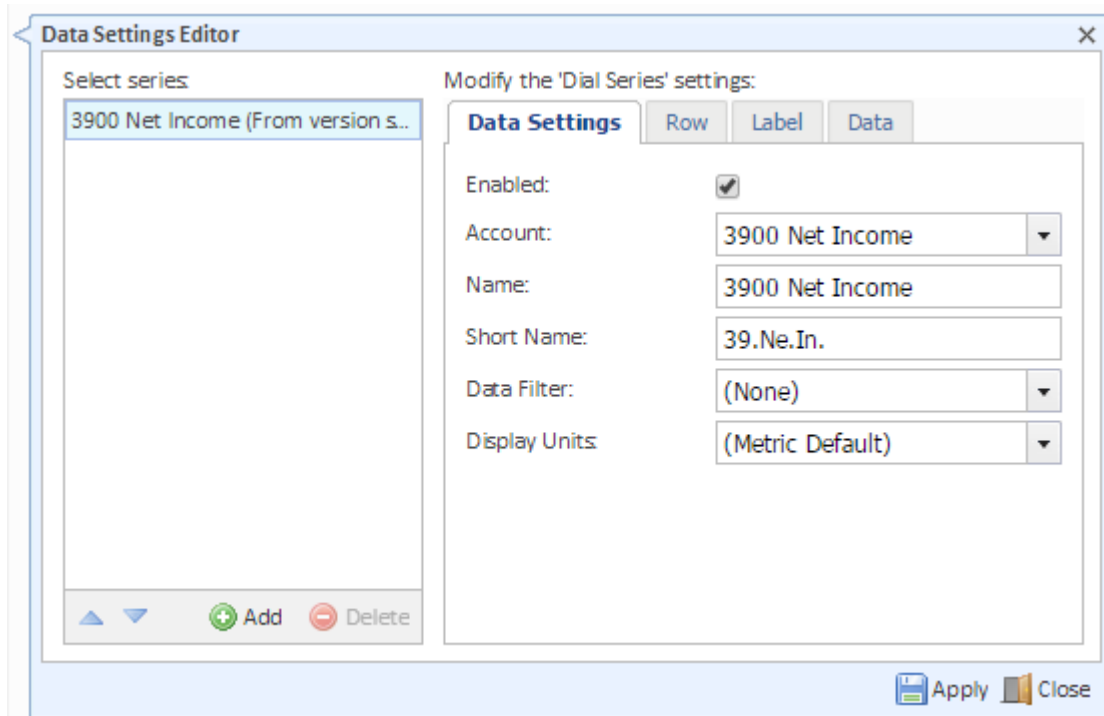


Figure 22: The **Data Settings** tab of the **Data Settings** editor.

Enter information on the **Data Settings** tab about an account. (This tab is discussed in the earlier section on the Data Settings editor. See “Data Settings” on page 28.) You can add another row by clicking **Add**. You can also use the Data Settings editor to change the order in which rows appear by selecting a row and using the up and down arrows to move it to the desired place.



Note: Large custom scorecards with lots of rows can take noticeably longer to refresh or update than other widgets. This is because a custom scorecard can have as many as 630 data cells, each of which may require multiple calls and queries to retrieve and calculate the information that appears in the cell.

The Row tab (shown in Figure 23) has a single setting on it for setting the row height.

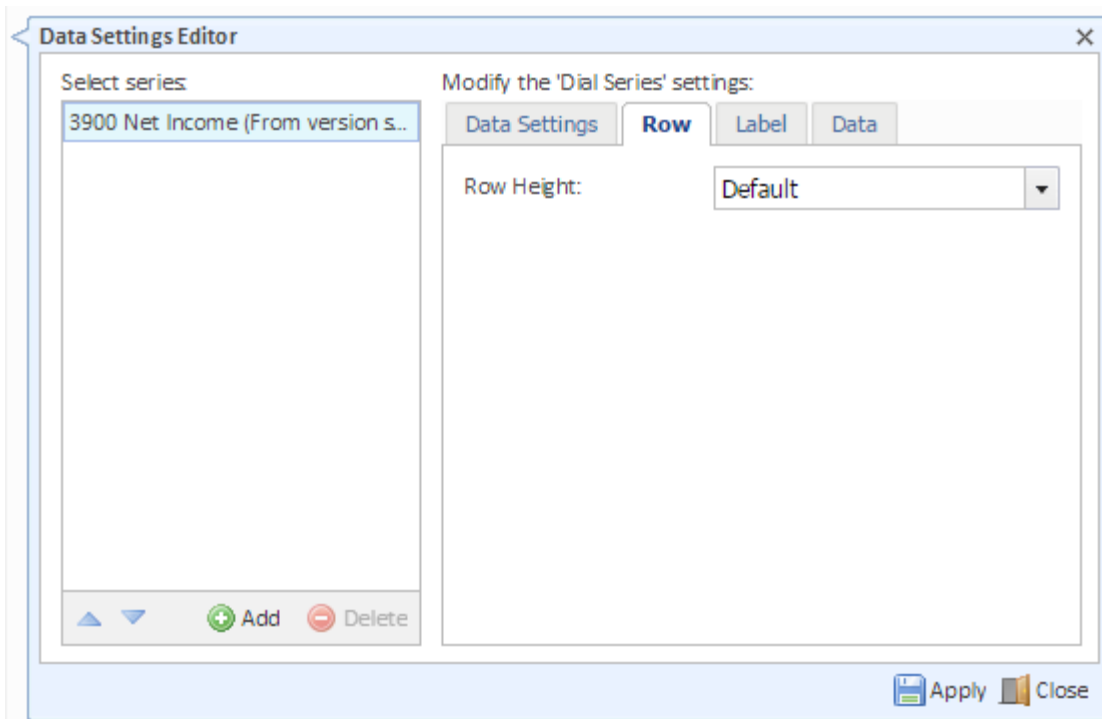


Figure 23: The **Row** tab of the **Data Settings** editor.

The Label tab (shown in Figure 24) lets you set the colors, font size, font style, font color, and label alignment of the row labels.

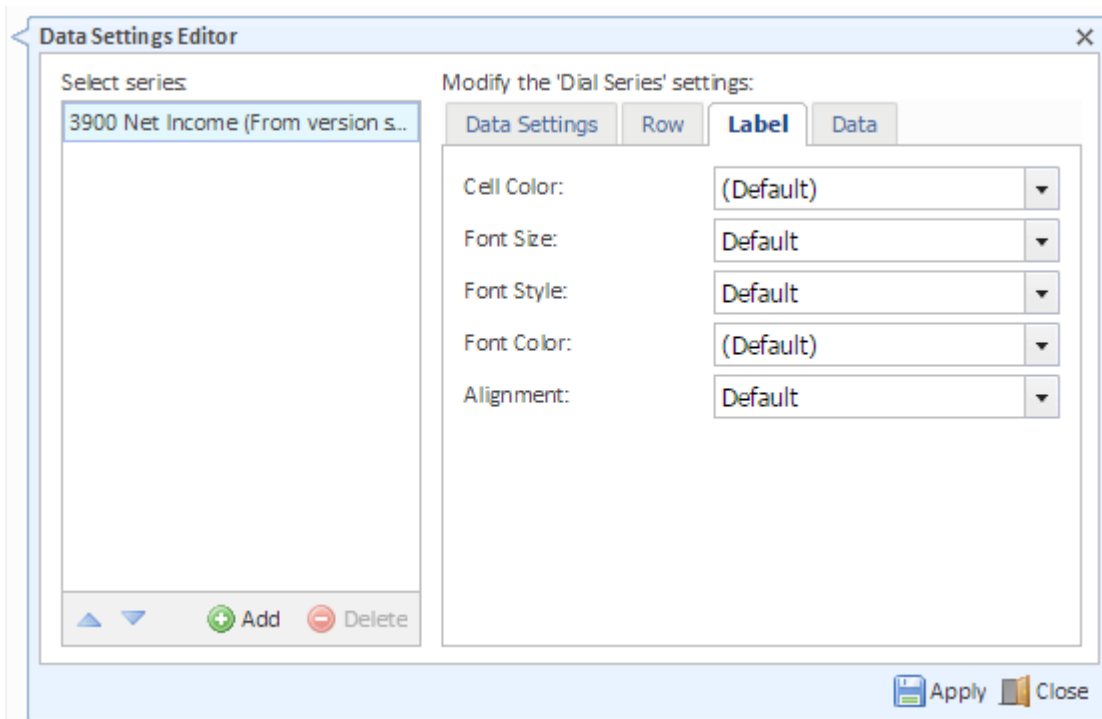


Figure 24: The **Label** tab of the **Data Settings** editor.

The Data tab (shown in Figure 24) lets you set the row height, cell color, font size, font style, font color, and data alignment for the cells in the custom scorecard.

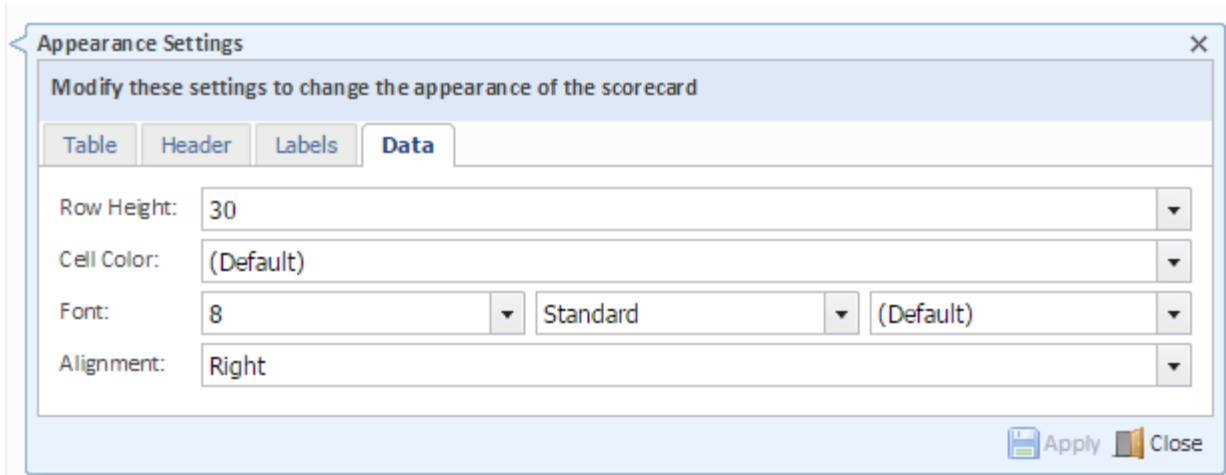


Figure 25: The **Data** tab of the **Data Settings** editor.

Section Editors

Custom scorecards have three sections for time. Each of these sections can have from one to seven columns. Because each section is usually a different period and can have different columns with unique settings, each section has its own section editor. You use section editors to set the section name, number of columns, period, period alignment, data range, comparison criteria, and other display and comparison settings. Figure 26 shows the **Section** tab in a section editor.

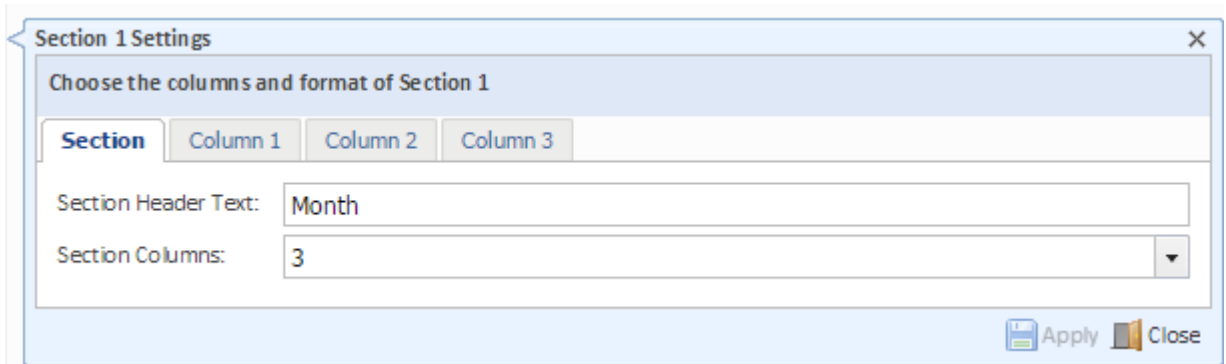


Figure 26: The **Section** tab in a section editor.

The **Section** tab lets you set the name for the section and specify the number of columns in the section.

- **Section Header Text:** Enter the section name. This appears above the section. The sections default to time values (Month, QTD, and YTD) but you can use any grouping you like.
- **Section Columns:** Enter a number from 0 to 7 to specify the number of columns in the section. If you enter 0, the section does not appear.

The section editor displays a column tab for each column specified in the section. Figure 27 shows a typical column tab.

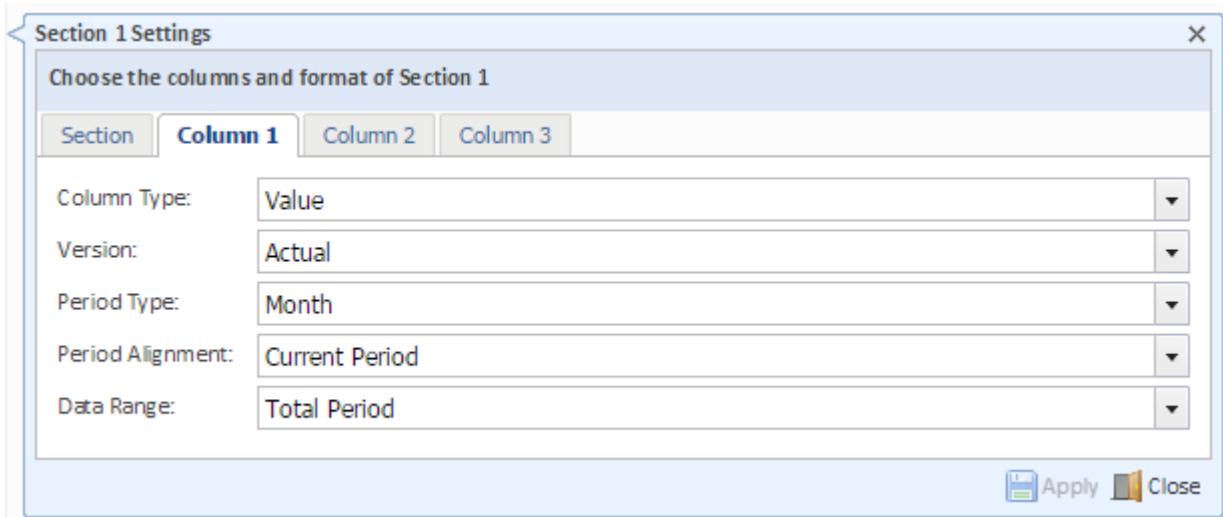


Figure 27: A column tab in the section editor.

The **Column** tabs let you specify the kind of information to display in that column as well as how the information in that column is formatted. The options that appear on the tab are based on the column type you select:

- **Value:** Displays a value. Lets you specify the version, period type, period alignment, and data range.
- **Variance:** Displays a variance amount as calculated against another version and period. Lets you specify the version, period type, period alignment, data range, comparison version and comparison period alignment.
- **Percent Variance:** Displays a variance percentage as calculated against another version and period. Lets you specify the version, period type, period alignment, data range, comparison version and comparison period alignment.
- **Zone:** Displays a zone. Lets you specify the version, period type, period alignment, and data range.
- **Trend:** Displays a trend variance by drawing a straight line linear regression on the specified data and identifying the slope of the line. Lets you specify the version, period type, period alignment, data range, and breakdown period type.
- **Microchart:** Displays a microchart. Lets you specify the version, period type, period alignment, data range, breakdown period type, chart color, and chart type.

Appearance Settings Editor

The Appearance Settings editor lets you modify the appearance of the entire widget, headers, row labels, and data.

The **Table** tab (shown in Figure 28) lets you set the appearance for the custom scorecard.

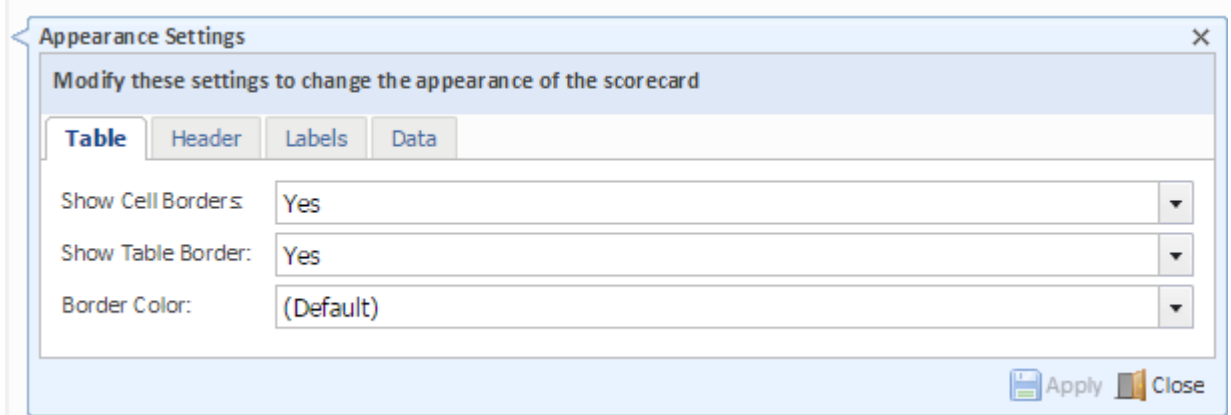
The screenshot shows the 'Appearance Settings' dialog box with the 'Table' tab selected. The dialog has a title bar with a close button (X). Below the title bar is a subtitle 'Modify these settings to change the appearance of the scorecard'. There are four tabs: 'Table', 'Header', 'Labels', and 'Data'. The 'Table' tab is active. It contains three settings: 'Show Cell Borders' set to 'Yes', 'Show Table Border' set to 'Yes', and 'Border Color' set to '(Default)'. At the bottom right are 'Apply' and 'Close' buttons.

Figure 28: The **Table** tab of the **Appearance Settings** editor.

- **Show Cell Borders:** Select Yes to display cell borders in the custom scorecard or No to suppress cell borders.
Default: **Yes**.
- **Show Table Border:** Select Yes to display a border around the custom scorecard or No to suppress the border.
Default: **Yes**.
- **Border Color:** Select the color to use for all borders.
Default: The default color.

The **Headers** tab (shown in Figure 29) lets you set the appearance of section and column headers.

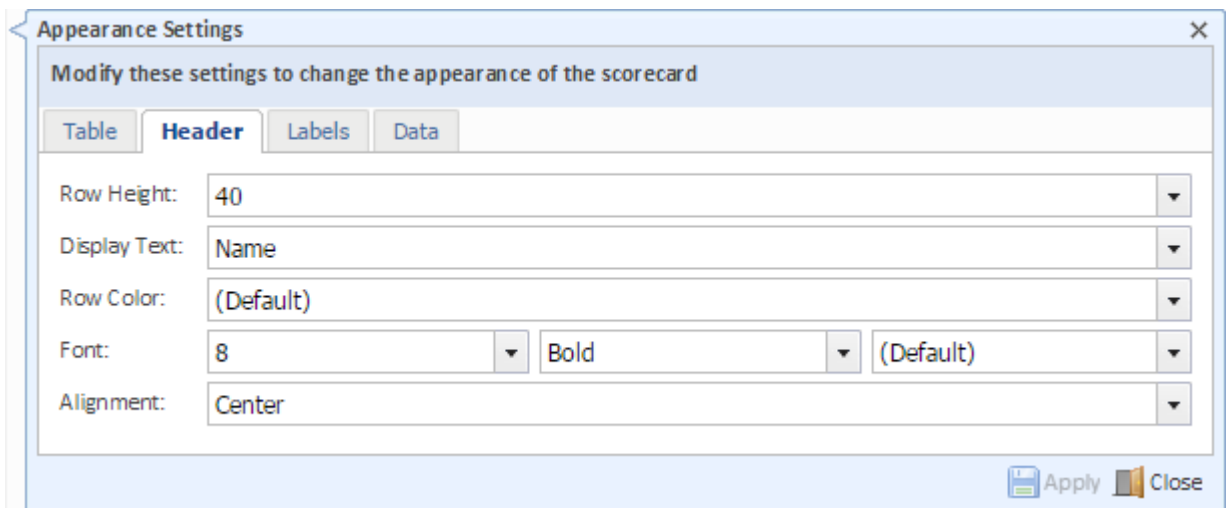
The screenshot shows the 'Appearance Settings' dialog box with the 'Header' tab selected. The dialog has a title bar with a close button (X). Below the title bar is a subtitle 'Modify these settings to change the appearance of the scorecard'. There are four tabs: 'Table', 'Header', 'Labels', and 'Data'. The 'Header' tab is active. It contains five settings: 'Row Height' set to '40', 'Display Text' set to 'Name', 'Row Color' set to '(Default)', 'Font' set to '8', 'Bold', and '(Default)', and 'Alignment' set to 'Center'. At the bottom right are 'Apply' and 'Close' buttons.

Figure 29: The **Header** tab of the **Appearance Settings** editor.

- **Row Height:** Enter a row height between 10 to 60 for the section and column headers.
Default: **40**.

- **Display Text:** Select Name or Short Name to display either the name or short name for the headers.
Default: **Name**.
- **Row Color:** Select the fill color to use for all header cells.
Default: The default color.
- **Font:** Select the font size, characteristics, and font to use for all header cells.
Default: **8, Bold**, and the default font.
- **Alignment:** Select the text alignment in the header cells.
Default: **Center**.

The **Labels** tab (shown in Figure 30) lets you set the appearance of the row labels.

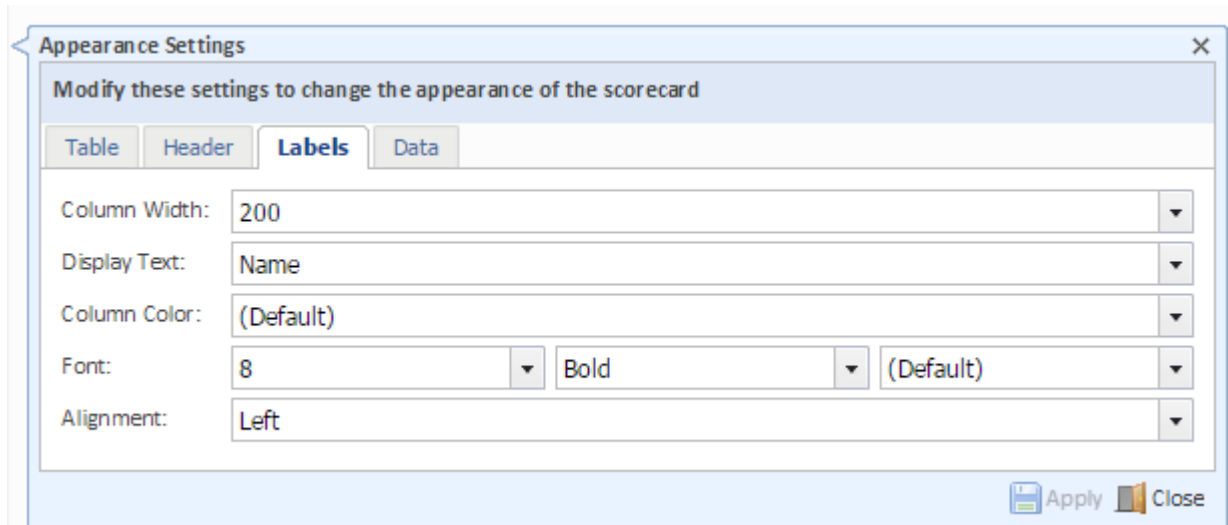


Figure 30: The **Header** tab of the **Appearance Settings** editor

- **Column Width:** Enter a column width between 100 to 500 for the row labels.
Default: **200**.
- **Display Text:** Select Name or Short Name to display either the name or short name for the row.
Default: **Name**.
- **Column Color:** Select the fill color to use for the row labels.
Default: The default color.
- **Font:** Select the font size, characteristics, and font to use for the row labels.
Default: **8, Bold**, and the default font.
- **Alignment:** Select the text alignment in the row labels.
Default: **Left**.

The **Data** tab (shown in Figure 31) lets you set the appearance of the cells within the custom scorecard.

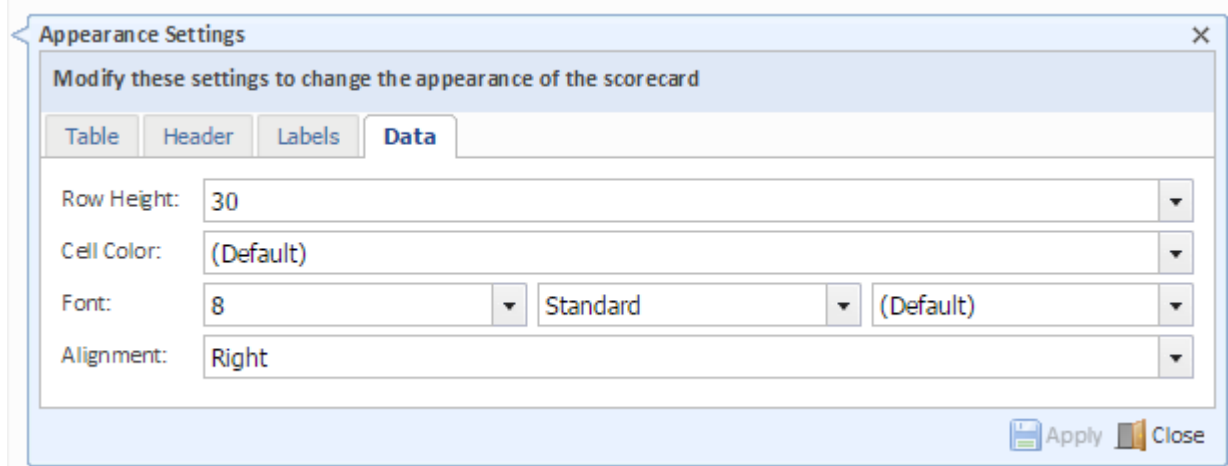


Figure 31: The **Data** tab of the **Appearance Settings** editor

- **Row Height:** Enter a row height between 10 to 60 for the cells. (This setting also affects the height of the row labels.
Default: **30**).
- **Cell Color:** Select the fill color to use for the cell color.
Default: The default color.
- **Font:** Select the font size, characteristics, and font to use for the cells.
Default: **8**, **Bold**, and the default font.
- **Alignment:** Select the text alignment in the cells.
Default: **Right**.

Table Settings

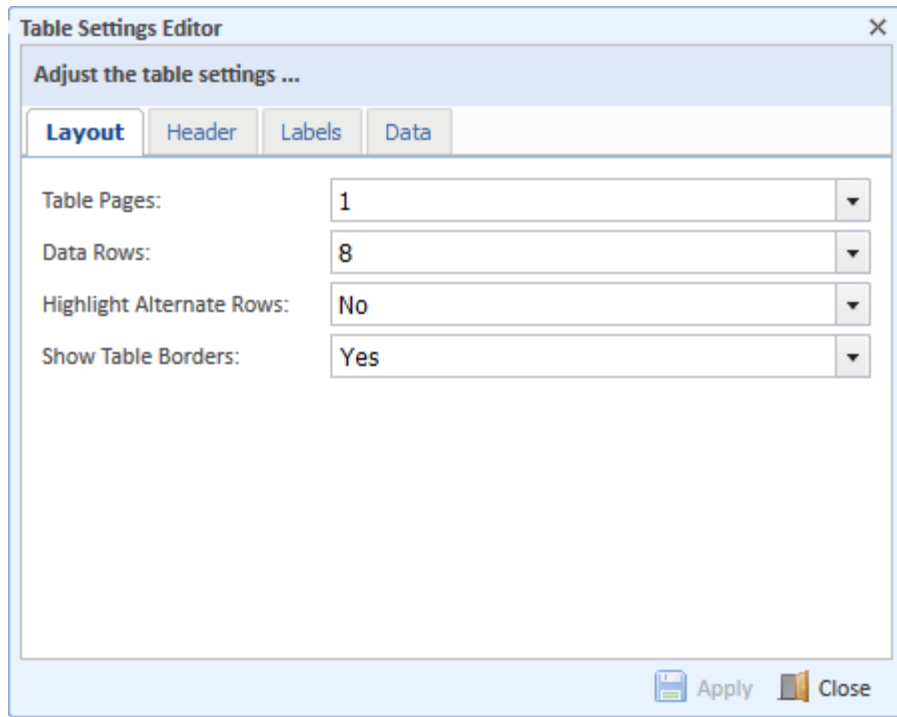


Figure 32: The Table Settings editor.

Layout Tab

Set the basic layout for the table.

- **Table pages:** Set the number of times the table's columns repeat horizontally. This can be useful for tables where the **Break down data by** setting results in a large number of rows.
- **Data rows:** Set the number of rows of data to display.
- **Highlight alternate rows:** If **No**, all rows have a white background. If **Yes**, alternate rows have a gray background.
- **Show table borders:** Select whether to display the table's borders or not.

Header Tab

Set the properties of the table's header row.

- **Show table header:** Choose whether or not to display the header row.
- **Header height:** Set the height of the header relative to the rows in the table. For example, selecting 1.0 for the header height makes it the same height as the rows, while selecting 2.0 for the header height makes it twice as high as the rows.
- **Header background color:** Set the background color for the header row.
- **Header text color:** Set the color for the text in the header row.
- **Header font size:** Set the size of the text in the header row.

- **Label header font style:** Choose whether the label header is bold, italicized, underlined, or some combination of the three. The label header is the header row cell above the column whose entries label the rows of the table.
- **Label header alignment:** Choose whether the label header is aligned to the left, center, or right.

Labels Tab

Controls how the labels for the rows appear.

- **Label column width:** Set the width of the label column. The default is for all columns to be of equal width.
- **Label text:** Choose whether to show the full display name of the labels, or to use the abbreviated display name. Abbreviated names are automatically generated unless set by administrators.
- **Label text alignment:** Choose whether the label text should be aligned to the left, right, or center in the label column.
- **Label text color:** Set the color for the label text.
- **Label font style:** Choose whether the label text is bold, italicized, underlined, or some combination of the three.
- **Label font size:** Set the font size for the label text.
- **Label cell color:** Set the cell color for the label column.

Data Tab

Controls the appearance of the data cells in the table.

- **Data text color:** Set the color for the data text.
- **Data font size:** Set the font size for the data text.

Data Filter

Filter the data used for the widget (for example, sort by expenses in ascending order, or show only the first 100 records). The **Data Filter** editor is shown in Figure 33.

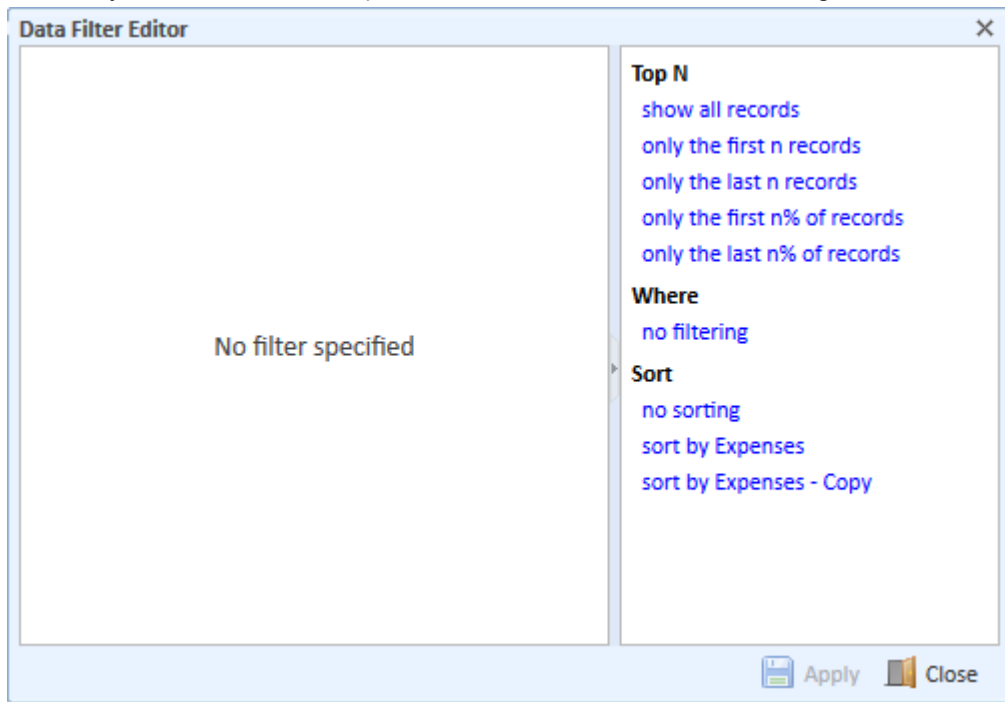


Figure 33: The **Data Filter** editor

Click a filter on the right to use it, then click any bold term to edit it. In Figure 33, "only the first n% of records" has been selected, and both "first" and "10" can be edited.

Zone Bands

Enable or disable zone bands for the widget. Zone bands highlight data in different ranges with symbols and colors, letting you see at a glance if an account is dangerously low, if your department is under budget, and other similar data-range information. A sample widget showing zone bands appears in Figure 34. In this sample, the zones change in rela-

tion to the budget values. If the zones were set to specific numbers, they would remain constant. See Table 2 on page 18 for definitions of the different icons.



Figure 34: A widget with percentage zone bands in place.

Account Zones

The **Account Zone** editor (shown in Figure 35) lets you set the data ranges for the account's zones and the ranges for zone alerts. Account zones apply to all widgets an account appears in, so you only have to set them up once for each account.

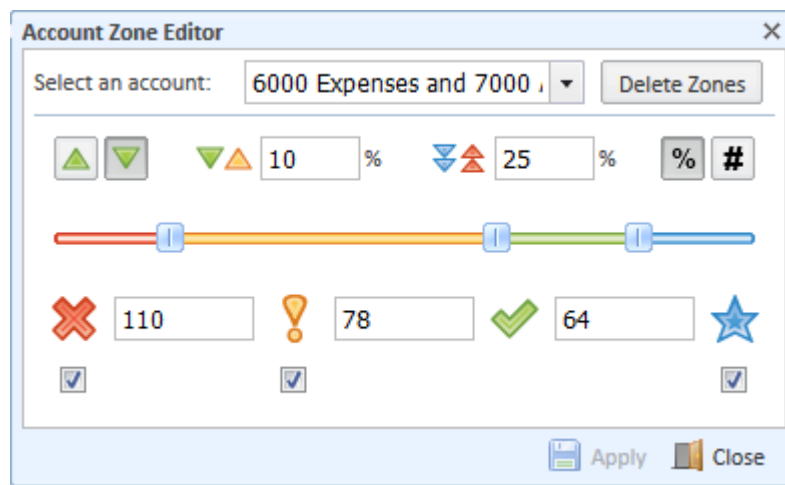


Figure 35: The **Account Zone** editor.



Note: Depending on your company's theme, the icons for zones and other icons and graphics may be slightly different from the images shown.

In Figure 35, the settings are:

- Trending upward is an improvement.
- A change of less than 10% does not cause any alerts to display.

- A 10% - 24% change upward or downward causes a Trending alert to appear on the widget.
- A 25% or greater change upward or downward causes a Trending Quickly alert to appear on the widget.
- The numbers in the account zone fields (here, 70, 80, and 110) are percentages rather than fixed numbers.
- If Net Income is 70% or less than budgeted, it is in the Bad zone, and an alert appears on the widget.
- If Net Income is 70%-80% of budget, it is in the Warning zone, and an alert appears on the widget.
- If Net Income is 80%-110%, it is in the Good zone.
- If Net Income is 110% of budget or greater, it is in the Excellent zone, and an alert may appear on the widget.

Analysis Settings

Choose the analysis settings for the widget and the behavior of zone alerts. The options are:

- **Default Analysis View:** Choose the analysis view used for the widget. **Standard** causes the widget to show the data as it is in the app, with no analysis applied. Select an analysis view to have the data run through analysis before being displayed. Which views are available depends on the type of widget.
Default: **Standard**
- **Show Data Zone Alerts:** Choose whether to show zone alerts in all views, analysis views only, or never.
Default: **Yes**, show Zone Alerts
- **Show Zone Alerts:** Choose whether to show alerts in the upper left corner of the widget or not.
Default: **Yes**

Context Settings

Appears only for perspectives. When you customize the order of the perspectives, the **Override** display order check box is automatically checked. If you would like to revert to the default display order, uncheck this box.

Display Order Settings

Change the order in which perspectives appear in the **Context Pane** perspectives drop-down menu, by user.

Top N Filter

This editor appears only for grid widgets. It lets you filter the grid based on one of the columns and only display the top N rows. Its fields are:


- **Top:** How many rows should be displayed.

- **Sort column:** Which column should be used for sorting the grid.
- **Sort direction:** How the column should be sorted, in ascending or descending order.

Advanced Filter

This editor appears only for grid widgets. It lets you create complex filters by composing expressions. Once applied, only rows that meet the conditions of the filter are displayed.

The order of the list is the order in which the filters are applied. Filters can be moved up and down the list of filters with the arrow buttons in the lower left of the editor.

To add a new filter, click **Add**, then the edit icon  in the **New** row.

To remove a filter, click it in the list to highlight it, then click **Remove**.

Actions Menu

The **Actions** menu (shown in Figure 36) lets you grant other people access to your components and perform other actions.

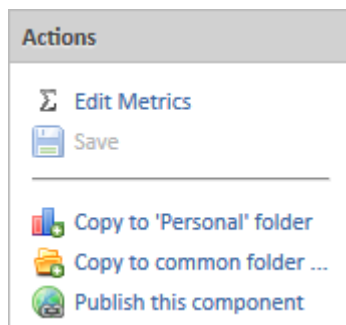


Figure 36: The **Actions** menu

- **Edit Metrics:** Open the **Data Components** editor.
- **Save:** Save the currently-selected component.
- **Copy to 'Personal' folder:** This option duplicates the component and places the copy in your personal folder. The original version is unedited, and any changes you make in the future to the copy in your folder only affect that copy, not the original.
- **Copy to common folder:** Copying a component to the common folder makes a duplicate of it available to anyone with access to the folder.
- **Publish this component:** Perspectives are the only component that can be published. When you publish a perspective to another user or group of users, it becomes available to them along with their other perspectives in the main Mumbleware screen area. This is a way to give other users access to widgets, ribbons, and dashboards you have created when they do not have the ability to use the Visual Designer. If you edit the perspective or any of its components in the future and publish it again, it updates the perspective for the users you publish to. Only users with Edit Company Mumbleware Dashboard permission have access to this function. For more on how to publish a perspective, see “Dial Design Best Practices” on page 116.

Publishing a component lets you give specific people access to your component when they open the Visual Designer. If they include your component in one of their dashboards, any changes you make to the component appear on their dashboards as well. Any changes that the other user or users make to the component also show on your dashboard, however. If you want to share a component without having to worry about the other people changing it, you can do so by making a copy of it and sharing the copy, keeping the original for your own use.

- **Delete this component:** Deleting a component removes it from your personal folder or the company folder, if it is a company component. If you have shared it with anyone else, it is no longer available to them.

Data Components Menu

The **Data Components** menu appears when you click **Edit Metrics** in the **Actions** menu. It displays all the various data series available for inclusion in widgets, and appears when you select a dashboard or widget to edit. You can click and drag any series from the menu onto a blank spot on the dashboard to open the **Create New...** dialog and create a widget using that series. You can also drag data series onto widgets already on the dashboard to add them to the widget.

The **Data Components** menu is especially handy for creating and editing grid widgets. For a detailed example of how to do this, see See “Creating a Grid Dial” on page 91.

The types of data components available depends on the widget you are editing. Most widgets use **Metrics**, which are data series such as accounts or downtime, you can add to widgets.

Metrics can be dragged right onto a freeform dashboard to create a new widget showing that data series.

Data Components Editor

The **Data Components** editor lets you add and edit metrics/accounts in the **Data Components** menu. When you select a metric/account to edit or right-click and select to create a new one, the appropriate tabs and fields appears in the main pane.

You can organize your metrics/accounts into folders by right-clicking the parent folder and selecting **Add > Metric** folder in the right-click menu. Click and drag metrics/accounts into the folders where you want to keep them.

The fields of the editor and their uses are:

- **Settings** tab
 - **Name:** The name of the metric/account.
 - **Short Name:** The name to be used where the metric/account short name is displayed.
 - **Budget Name:** The name of the corresponding budget/target version.
 - **Units:** The units of the metric's/account's values.
 - **Minimum Period Type:** Non-selectable time granularity.
- **Expression** tab (calculated metrics only)

- **Disabled Variable Handling:** Behavior if one of more metrics used in the calculation are disabled. The options are:
 - **Disable Metric:** Disable the calculated metric as well.
 - **Ignore Variable:** Ignore the metric that was disabled and compute the calculated metric based on the other metrics.
- **Null Variable Handling:** Behavior if one or more metrics used in the calculation have a null value. The options are:
 - **Use null value:** Use null in the calculation.
 - **Use zero:** Use a value of 0 instead of null value.
- **Expression:** The expression to be used in the calculated metric. Click the arrow icon to see a list of the available fields and functions. Begin typing in any field to narrow the list of functions until you find the one you want. For assistance in creating the expression, click the metric formula help link under the **Expression** field.
- **Dimensions tab**
 - **Mapped Dimensions:** The list of dimensions available for drill for the metric. The default is all dimensions. Use the checkboxes to disable dimension drill-downs for metrics.

To create a calculated metric, do the following:

1. Click **Edit Metrics** in the Actions menu.
The **Data Components Editor** opens.
2. Select the folder where you want the calculated metric to be stored, then right-click on it. Alternately, create a new folder and select it.
3. Select **Add > Calculated Metric** from the right-click menu.
4. Use the fields to design your calculated metric.
5. Click **Apply**.
6. Click **Close**.

Grid Widget Data Components

Grid widgets let you create a table of data, similar to a report. As a result, a much longer list of data components appear in the **Data Components** menu compared to other widget types. These components are:

- **Calculated Columns:** Contains calculations you can add to a grid widget as a column, like **Expression**, **Variance**, etc.
- **Periods:** Contains units of time, which can be added to a grid widget as a column.
- **Metrics:** Data series, such as accounts, paint inventory, and downtime, which you can add to widgets.
- **Dimensions:** Contains all dimensions available to you, such as **Level**, **Department**, and **Title**.
- **Rows:** Contains analysis rows, which can be added to a grid widget.

File Actions Bar

The File Actions bar (shown in Figure 37) gives you the ability to save the work you have done on a component you were editing, close the component currently open in the main editing area, and return to the dashboards you were viewing before opening the Visual Designer.



Figure 37: The File Actions bar.

- Click **Save** to save the changes you have made to a component.
- Click **Close** to close the component you have been working on.
- Click **Return to Dashboards** to return to the Mumbleware screen's main view.

Main Editing Area (Visual Designer Only)

When you are using the Visual Designer, the central portion of the screen is where components you create and edit appear, and where some of your editing work is done.

To open a component for editing, click its name in the **Components** menu.

To add a component to the component currently open for editing (for example, adding a dashboard to a perspective, or a widget to a freeform dashboard), drag the component from the **Components** menu and drop it where you want it.

To change a component's position (for example, to move a widget to a different place on a dashboard, or to reorder the ribbons in a dashboard), click and drag the component where you want it to go. Any other components rearrange around it.

Formatting Hierarchies

You can use multiple editors to set the appearance of some widgets, and in some cases (particularly labels and fonts), the appearance settings may differ. There is a strict hierarchy of which settings override other settings.

If you are making changes to label colors or fonts and they are not appearing on your widget, a higher-level setting is probably overriding the setting you are changing.

If a tab mentioned in the hierarchies listed below does not display for the widget you are editing, then it does not apply to the widget and is skipped in the hierarchy.

For label color settings:

- The **Cell Color** setting on the **Label** tab in the Data Settings editor overrides any other settings. If this is set to **(Default)**, then:
- The **Label Column Color** setting on the **Label** tab in the Appearance Settings editor is applied. If this is also set to **(Default)**, then:
- The **Header Row Color** setting on the **Header** tab in the Appearance Settings editor is used.

For font settings:

- The **Font Style** setting on the **Data** tab of the Data Settings editor overrides any other settings. If it is set to (Default), then:
- *Column widgets only.* The **Column Font** settings (**Month Font**, **Quarter Font**, and **Year Font**) on the **Column** tab of the Appearance Settings editor are used. If it is set to Default, then:
- The **Data Font** setting on the **Data** tab of the Appearance Settings editor is used.

If a higher level setting is set, changing a lower level setting will not affect the widget. For example, if the **Font Style** setting on the **Data** tab of the Data Settings editor is set to **Bold**, changing the **Data Font** setting on the **Data** tab of the Appearance Settings editor will not change the appearance of the widget, because the **Font Style** setting is higher in the hierarchy and overrides the **Data Font** setting.

Using Components Created by Others

When you first get started using Mumbleware, you'll find a few starter components ready to use and ready to customize to make it easier to dive right in and start using the advanced capabilities offered by Mumbleware. As you and your coworkers begin creating components, you may find more components available to you in the **Company** folder or shared directly with you by others.

Using Shared Components

When another user shares a component with you, a folder named **Shared** appears with your other folders (**Personal**, **Company**, and **Starter**). You can then add components to your own perspectives, dashboards, and ribbons.

It's important to keep in mind that shared components can still be edited by the person who created them. If you place a shared widget created by someone else on your dashboard, for example, and they make changes to it, you see the changes on your dashboard.

If you want to keep a shared component exactly as it is, copy it to your personal folder and then use it from there.

Using Company Components

Company components are available to you in a special folder, named after your company, in the **Components** menu. These components can only be created and edited by users with the **Edit Company Mumbleware Dashboard** permission.

You can add company components to your perspectives, dashboards, and ribbons as you would any other component.

If you like a company component but want to edit it for your own use, save a copy of it to your personal folder (use the **Copy to personal folder** option in the **Actions** menu) and edit the copy.

Using Starter Components

A starter perspective containing one dashboard, which holds three rows of widgets, has already been created for you. The widgets contained in this dashboard are:

- **Expense Line Graph:** A line graph showing data from the PL Expense accounts.
- **Expenses by Level Column Chart:** A column chart showing the expenses for each level.
- **Expenses by Level Pie Chart:** A pie chart showing the portion of total expenses made up by each level.
- **Net Income Line Graph:** A line graph showing data from the Net Income account.
- **P&L Scorecard:** A scorecard comparing profits and losses based on the PL Income, Non-Operating Income, PL COGS, PL Expense, Non-Operating Expenses, and Net Income accounts.

For information on customizing the starter components for your own or for company use, see “Customizing Starter Dials” on page 84.

Creating Your Own Components

Creating your own components lets you get Mumbleware set up exactly the way you need it to be. You can create the exact widgets, ribbons, dashboards, and perspectives that are the most useful for you, and share them with others who have similar needs.

By creating your own widgets in particular, you can make very complex data unique to your company visible in one place, so you have a clear picture of what’s going on at your company and can make your decisions based on up-to-date data and projections.

This section walks you through creating each type of component.





Note: Generally speaking, it’s quickest to create a component by dragging **Create New [Component]** onto the perspective, dashboard, or ribbon where you want the new component to go. If you want to create a new component without adding it to an existing perspective, dashboard, or ribbon, open the Visual Designer and click **Create New [Component]** in the **Components** menu. You can always add the component to a perspective, dashboard, or ribbon in the future by opening the location where you want to place it and dragging it from the **Components** menu onto the perspective, dashboard, or ribbon. Be sure to click **Save Layout** when you’re done.

Creating a Perspective

Perspectives are the only component that must be created in the Visual Designer.


To create a new perspective, do the following:

1. Open the Visual Designer by clicking Options  and selecting **Visual Designer**.
2. Click **Perspectives**  on the **Components** menu.
3. Expand the **Personal Perspectives** folder and click **Create New Perspective**. The **Create New Perspective** dialog appears.
4. Click the **New Perspective** template and specify a name.
5. Click **Create**.
The new perspective appears in your **Personal Perspectives** folder.
6. Click your new perspective's name to load it in the main editing area.



Your new perspective is ready to have one or more dashboards added to it. The first dashboard must be added in the Visual Designer, but subsequent dashboards can be added using editing in place.

Creating a Dashboard

To create a new dashboard using editing in place, do the following:

1. Open the perspective to which you want to add the new dashboard.
2. Click **Dashboards**  on the **Components** menu.
3. Expand the **Personal Dashboards** folder and drag the **Create New Dashboard** item onto your perspective.
The **Create New Dashboard** dialog appears.
4. Click either the **New Standard Dashboard** or **New Freeform Dashboard** template and specify a name. (Standard dashboards use ribbons to organize widgets, while freeform dashboards do not, you just place the widgets wherever you like.)
5. Click **Create**.

To create a new dashboard in the Visual Designer, do the following:

1. If the perspective you want to put the dashboard on isn't already open, click **Perspectives**  on the **Components** menu and click the perspective's name to open it.
2. Click **Dashboards**  on the **Components** menu.
3. Expand the **Personal Dashboards** folder and drag the **Create New Dashboard** item onto your perspective.
The **Create New Dashboard** dialog appears.
4. Click either the **New Standard Dashboard** or **New Freeform Dashboard** template and specify a name. (Standard dashboards use ribbons to organize widgets, while freeform dashboards do not, you just place the widgets wherever you like.)
5. Click **Create**.
6. Click **Save Layout** in the lower left corner of the screen.



Your new dashboard is now ready to have one or more widgets (if it's a freeform dashboard) or ribbons (if it's a standard dashboard) added to it.

To add a dashboard to a perspective, open the perspective, then locate the dashboard in the Components Library or Components menu and drag it from the menu to the perspective.

Creating a Ribbon

Ribbons are only needed to hold widgets on standard dashboards. If you're using a freeform dashboard, you don't need to create a ribbon.

To create a new ribbon, do the following:

1. If the dashboard you want to put the ribbon on isn't already open, click its tab to open it (if you're using the Visual Designer, click **Dashboards**  on the **Components** menu and click the dashboard's name to open it).
2. Click **Ribbons**  in the **Components** menu.
3. Expand the **Personal Ribbons** folder.
4. Drag **Create New Ribbon** onto the dashboard where you want the ribbon to go. The **Create New Ribbon** dialog appears.
5. Click the **New Ribbon** template and specify a name.
6. Click **Create**. The new ribbon appears in your **Personal Ribbons** folder.
7. If you're in the Visual Designer, click **Save Layout** in the lower left corner of the screen.

All your new ribbon needs is one or more widgets, and your new perspective are ready to use.

To add a ribbon to a dashboard, open the dashboard, then locate the ribbon in the Components Library or Components menu and drag it from the menu onto the dashboard.

Adding Widgets to Dashboards

To add a widget to a freeform dashboard, open the dashboard, find the widget in the Components Library or Components menu, and drag it from the list into place.

To add a widget to a standard dashboard, you must drag it from the list into place on a ribbon.

Creating Widgets

Creating widgets is far more involved than creating the other components, because there are such a vast array of options to choose from. See "Dial Creation Walkthroughs" on page 66 for detailed instructions on creating widgets.

Resizing Widgets on a Freeform Dashboard

One of the differences between a standard dashboard and a freeform one is that the freeform dashboard lets you resize widgets and arrange them however you want. In the sample dashboard shown in Figure 38, there are no ribbons holding widgets on this freeform dashboard, and the Net Income Line Graph widget and Income Line Graph widget have been shrunk to fit one atop the other next to the Expense Line Graph widget. Meanwhile, the P&L Scorecard widget has been expanded to make it easier to read.

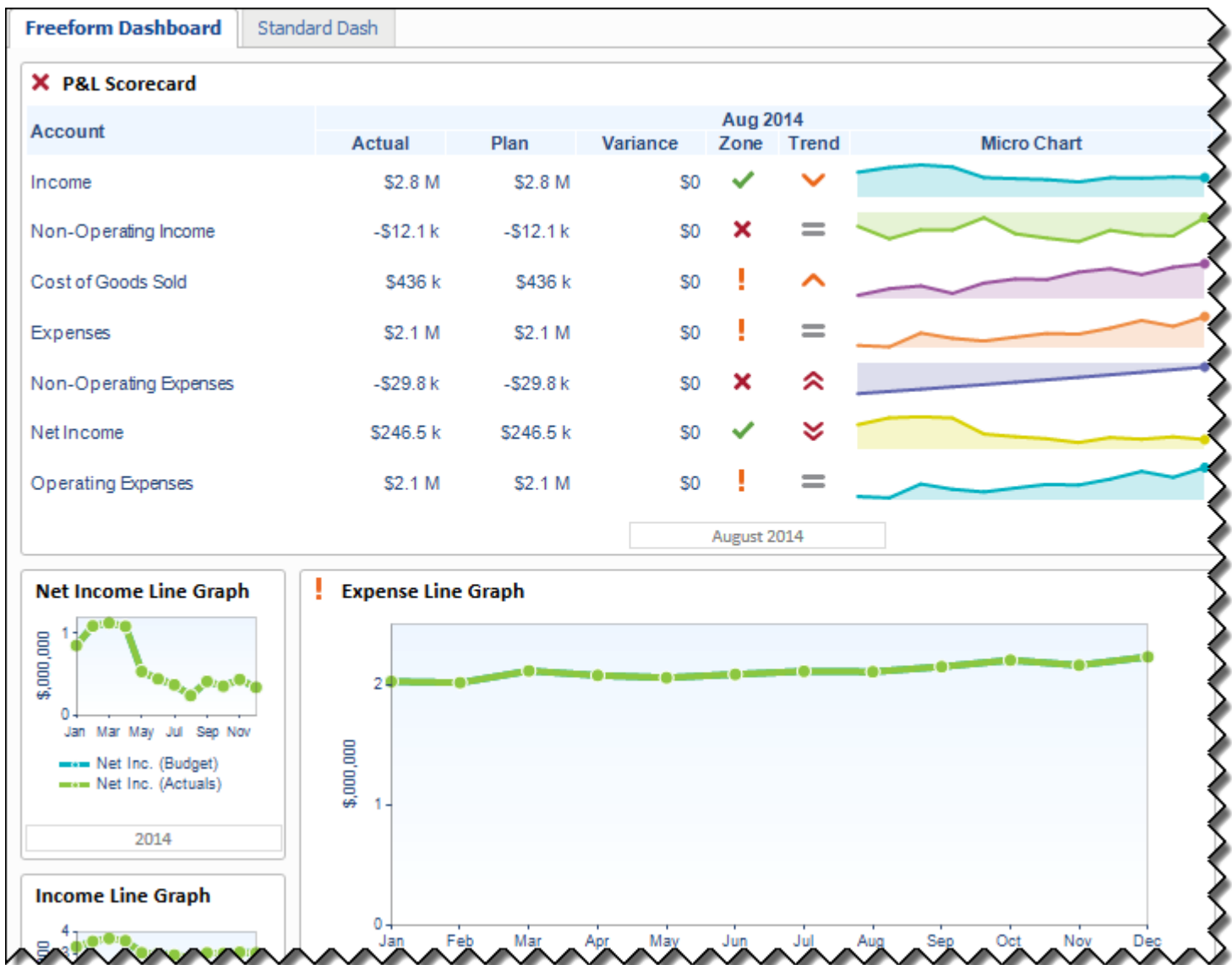


Figure 38: A freeform dashboard.

To resize a widget, hover your mouse pointer over the edge you want to change (or a corner if you want to change two edges). When it changes to a double-headed arrow, click and drag. The widget's new outline appear as a dotted grey line, and when you release

your click, the widget resizes to the new boundaries. A sample of this appears in

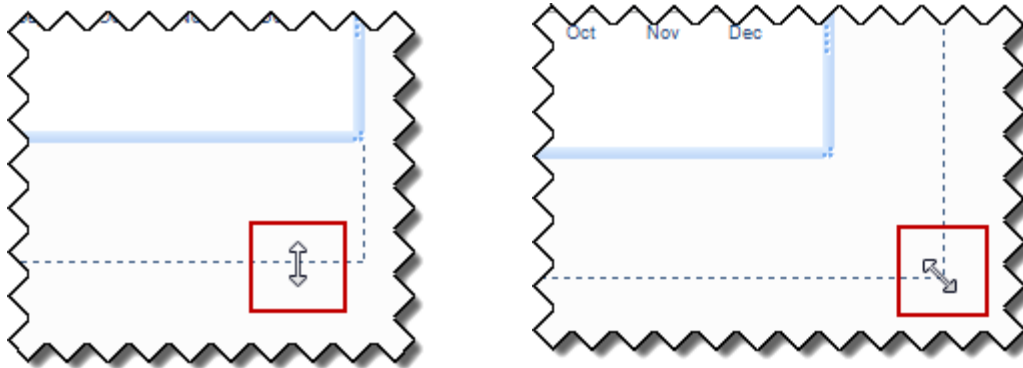


Figure 39: Resizing a widget

Figure 39.

To move a widget, just click on it and drag it to the position where you want it.

Sharing

Once you've made several components, you may find that you want to share them with your coworkers. You can do that with just a few clicks, making your components available for coworkers to add to their perspectives, dashboards, and ribbons.

Be aware that sharing makes the component available for editing, not just for using. If you share a widget with someone and they edit it in the Visual Designer, the changes appear when you look at the widget because it's the same widget. If you need to, make a copy of your component before sharing it by clicking **Copy to personal folder** in the **Actions** menu.

To share a component, do the following:

1. Open the component you wish to share by clicking its name in the **Components** menu.
2. Click **Share this Component** in the **Actions** menu.
The Share dialog appears.
3. Double-click one or more usernames in the **Available** list to add them to the **Selected** list.
4. To see exactly which users you are publishing to, check the show all individuals box.
This makes the dialog view-only. To resume adding names to the list, uncheck the box.
5. To remove a name from the **Selected** list, double-click it.

When you are satisfied with the **Selected** list, click **Save** to share your component.

Publishing

Publishing lets users with publishing permissions to make a perspective and any dashboards, ribbons, and widgets it contains visible to other users (individual subcomponents cannot be published). When you publish a perspective to another user or group of users, it becomes available to them along with their other perspectives in the main Mumbleware screen area.

To publish a perspective, do the following:

1. Click **Perspectives** in the **Components** menu.
2. Click the name of the perspective you want to publish to load it in the main editing area.
3. Click **Publish this component** in the **Actions** menu. The **Publish** dialog appears.
4. Double-click one or more usernames or level names in the **Available** list to add them to the **Selected** list.
5. To see exactly which users you are publishing to, check the **Show all individuals** box. This makes the dialog view-only. To resume adding names to the list, uncheck the box.
6. To remove a name from the **Selected** list, double-click it.
7. When you are satisfied with the **Selected** list, click **Save** to publish your perspective.

Unpublishing

After a perspective has been published, you can effectively unpublish it in a similar fashion. This means the perspective and its included components no longer appear in users' lists of perspectives in the main Mumbleware screen area. You can unpublish a perspective from a single user, or several users, or all users.

To unpublish a perspective, do the following:

1. Click **Perspectives** in the **Components** menu.
2. Click the name of the perspective you want to unpublish to load it in the main editing area.
3. Click **Publish this component** in the **Actions** menu. The **Publish** dialog appears.
4. Double-click one or more usernames or level names in the **Selected** list to remove them.
5. To see exactly which users have access, check the **Show all individuals** box. This makes the dialog view-only. To resume removing names from the list, uncheck the box.
6. To add a name to the **Selected** list, double-click it in the **Available** list.

When you are satisfied with the **Selected** list, click **Save**.

Now, only the users designated in the **Selected** list have access to the perspective.