Financial Administration Support Tool

Dashboard Manual

FAST DASHBOARD – USER MANUAL

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INTRODUCTION

A dashboard will provide a graphical user interface relevant to particular business processes, objectives and tasks. Once a dashboard is created, it can house any number of charts, graphs and grids based on your Pinned Reports.

CREATING A DASHBOARD

Login to *FAST* @ http://fast.uoit.ca

On the FAST home page click on the **Dashboard** button.

Click the **+** button to create a new Dashboard. By default, this will auto-label as *"New Dashboard"* until you provide a new Dashboard Name.
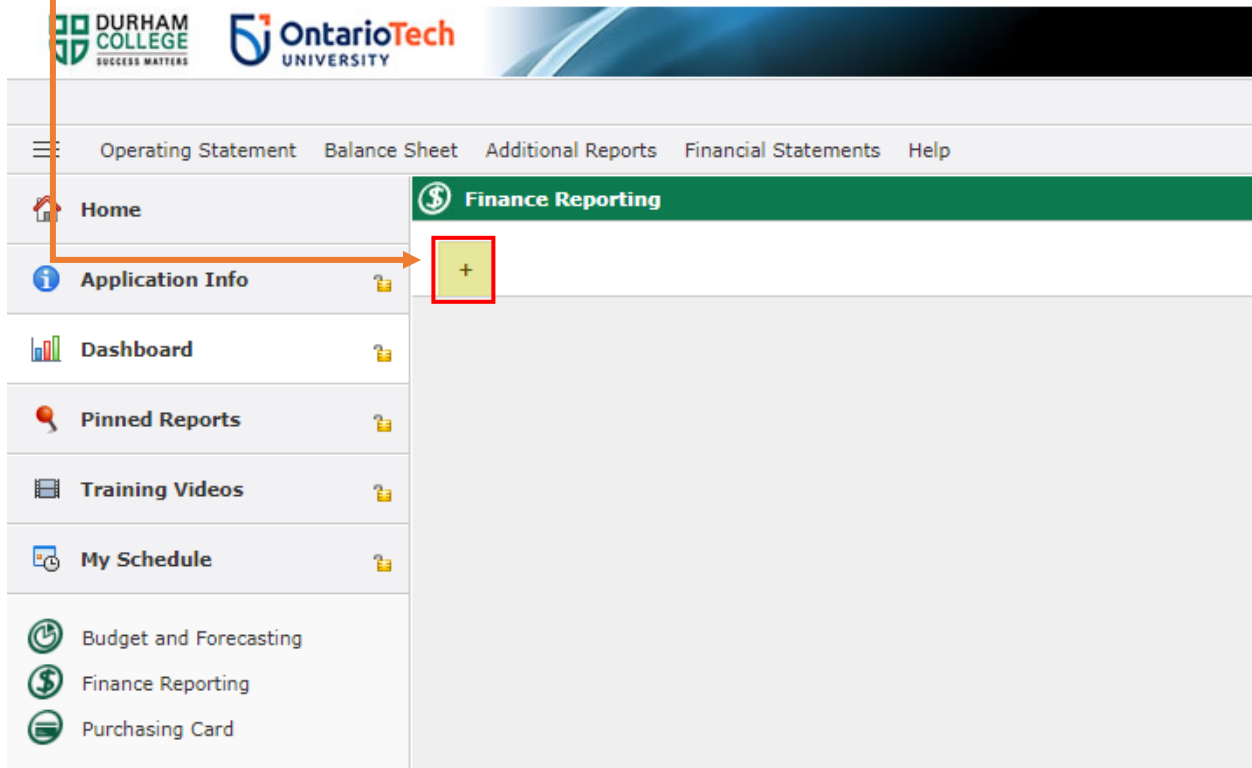
Include a title under **Dashboard Name** and a **Dashboard Description** (Optional)

CREATING A PINNED GRAPH/CHART

The next step is to create a graph/chart.

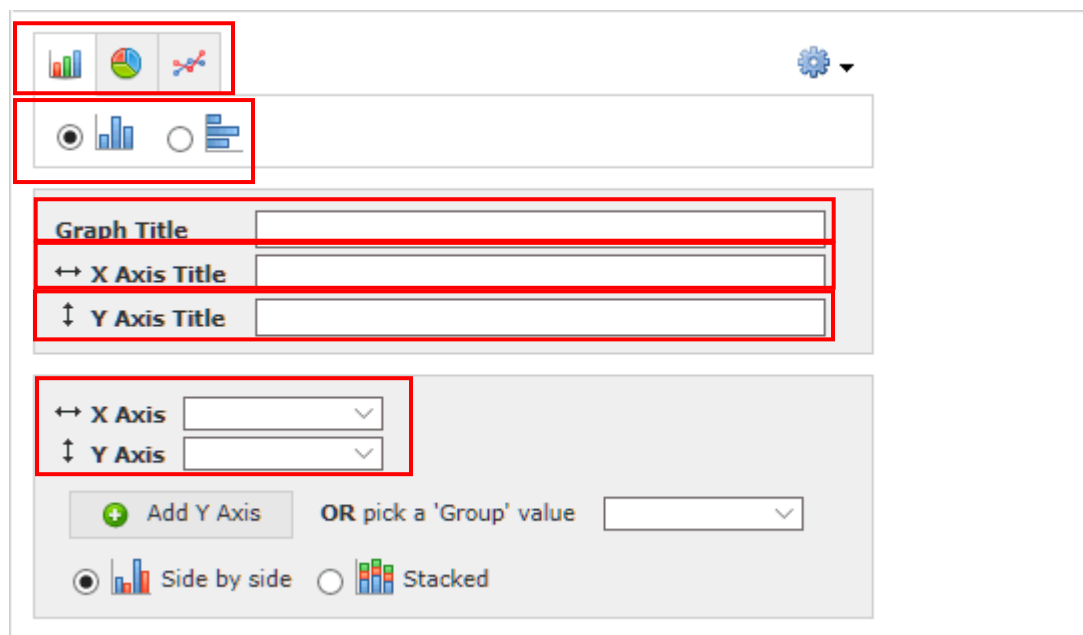Run any FAST report you would like to create a graph/chart from.

Once you have executed a report, one of the option is to graph it, and make it accessible on your Dashboard. Let's start with a basic example.

An important rule when it comes to graphing is that at least one of your variables (called the Y-Axis) must be a numeric field. For this reason, your report (or dataset) may need a bit of work before it's ready to be graphed.

When you have a data set that is ready to begin graphing, click on the **graph icon** on the toolbar ribbon:
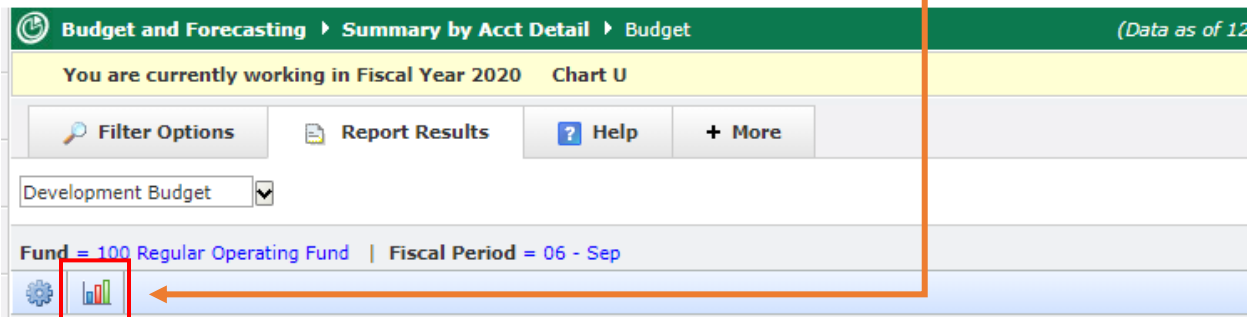
The graph Options worksheet will open just above the data grid. You will still see both panes open at the same time as you begin to build your graph.

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Require Help? Technical questions contact: Ben Suter at ben.suter@uoit.ca | 905-721-8668
ext. 2162 | Questions on the content of the budget: contact your financial analyst   4

Graph Type: You can choose from bar chart, pie chart (which includes donut graph) or line chart

Orientation: For bar charts, you can choose whether the graph will display as a standard vertical bar chart or as a horizontal bar chart

Graph Title: Include a meaningful title for the graph (please note that the Pinned Report title will be separate and is saved at a later step; these do not have to be the same, but can be)

X-Axis Title: Include a title for your X-Axis

Y-Axis Title: Include a title for your Y-Axis (more than one if applicable)

X-Axis field selection: In this drop-down, choose which field will contain the X-Axis data

Y-Axis field selection: In this drop-down, choose which field will contain the Y-Axis data (note: only numeric fields will appear here)

You may also select the button to add an **additional Y-Axis** if necessary; this will automatically open up another line.

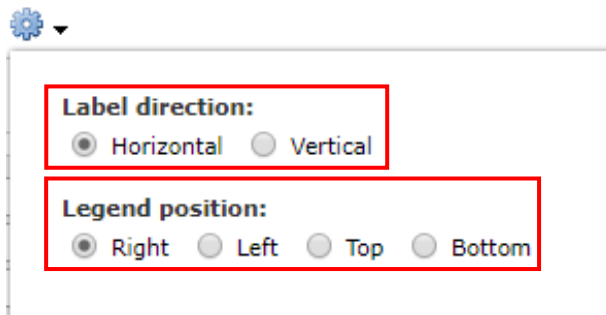Or, you may also choose a value to "Group" by using **'Group' value**, creating a new style of graph.

For Grouping, choose between the **Side by Side** or the **Stacked** options.

Using the **Gear** button, you can also change the Label Direction (Horizontal or Vertical) and the Legend Position (Right, Left, Top, Bottom):
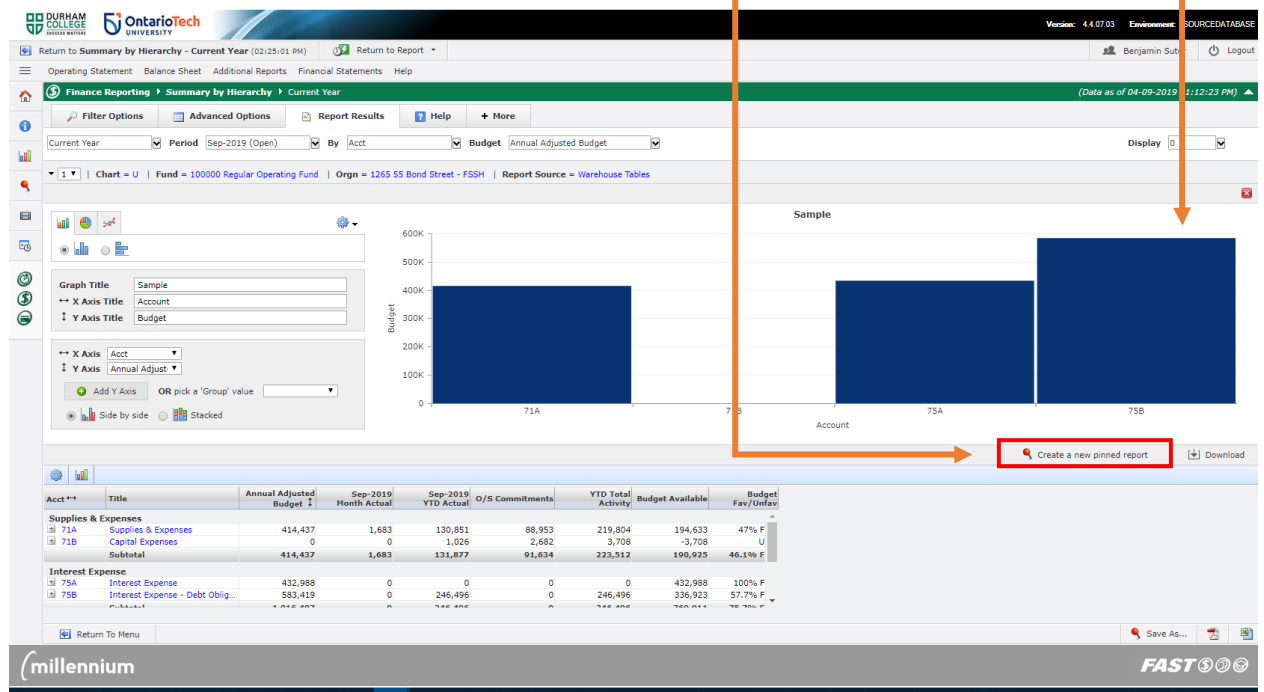

The Graph will preview itself in the top right corner.
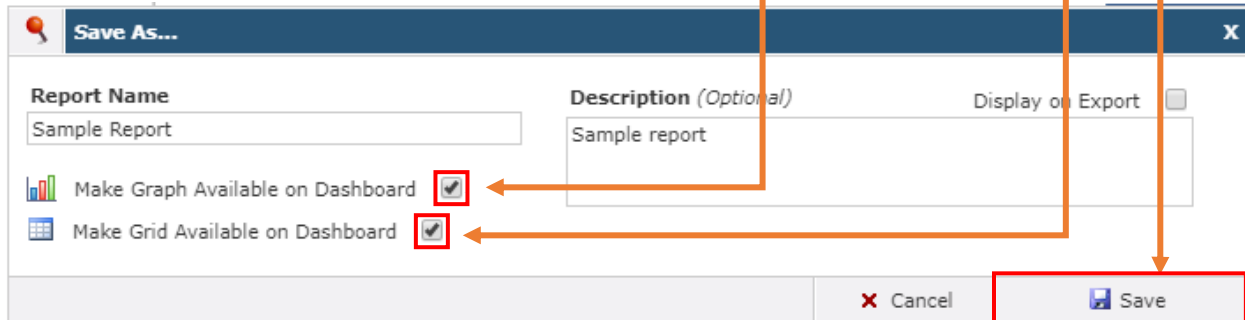
The graph needs to be pinned to be saved. Select **"Create a new pinned report"** to save it.

In the Save As pop up, click off both "**Make Graph Available on Dashboard**" and "**Make Grid Avalable on Dashboard".** Then click **Save.**
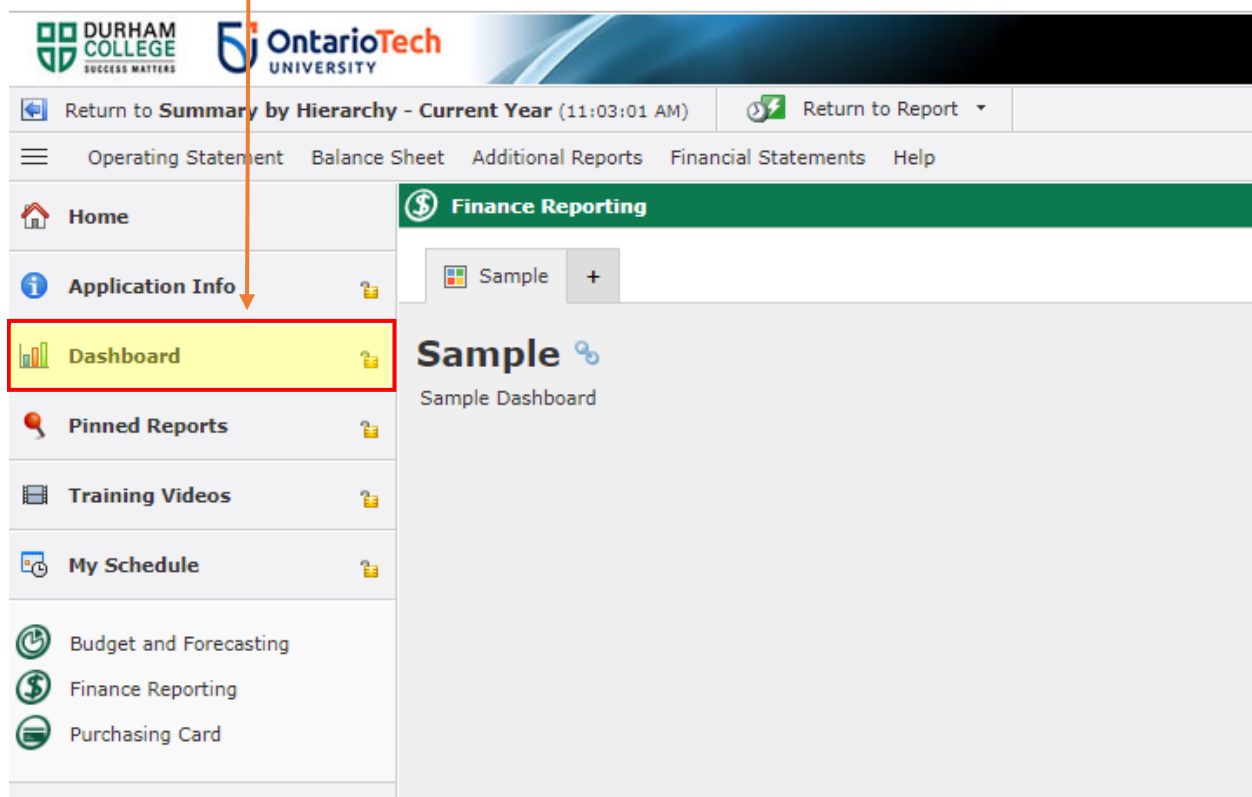

A Grid is the FAST Report the graph is based on.

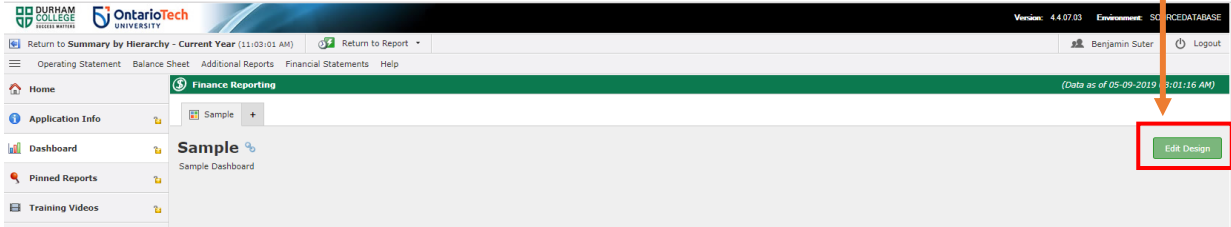## CUSTOMIZING A DASHBOARD

Go back to **Dashboard**
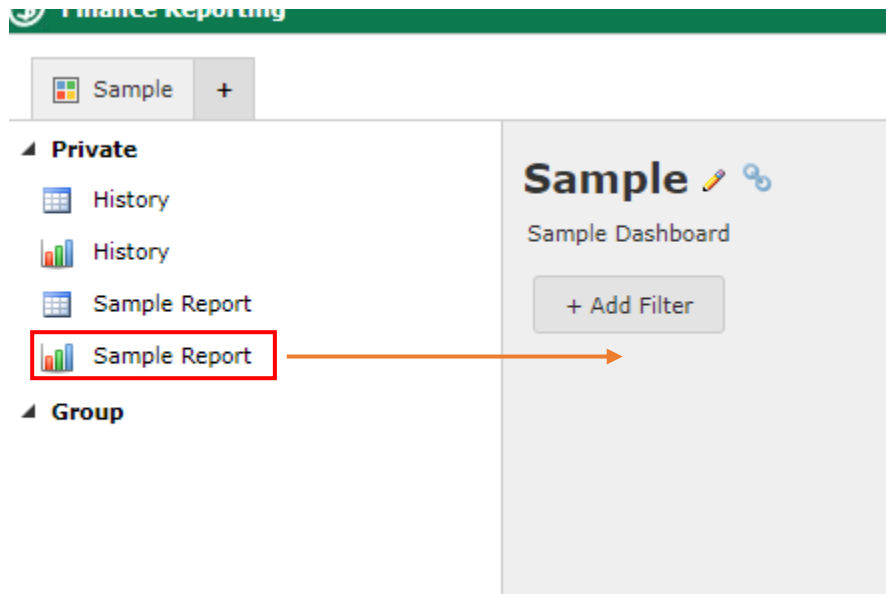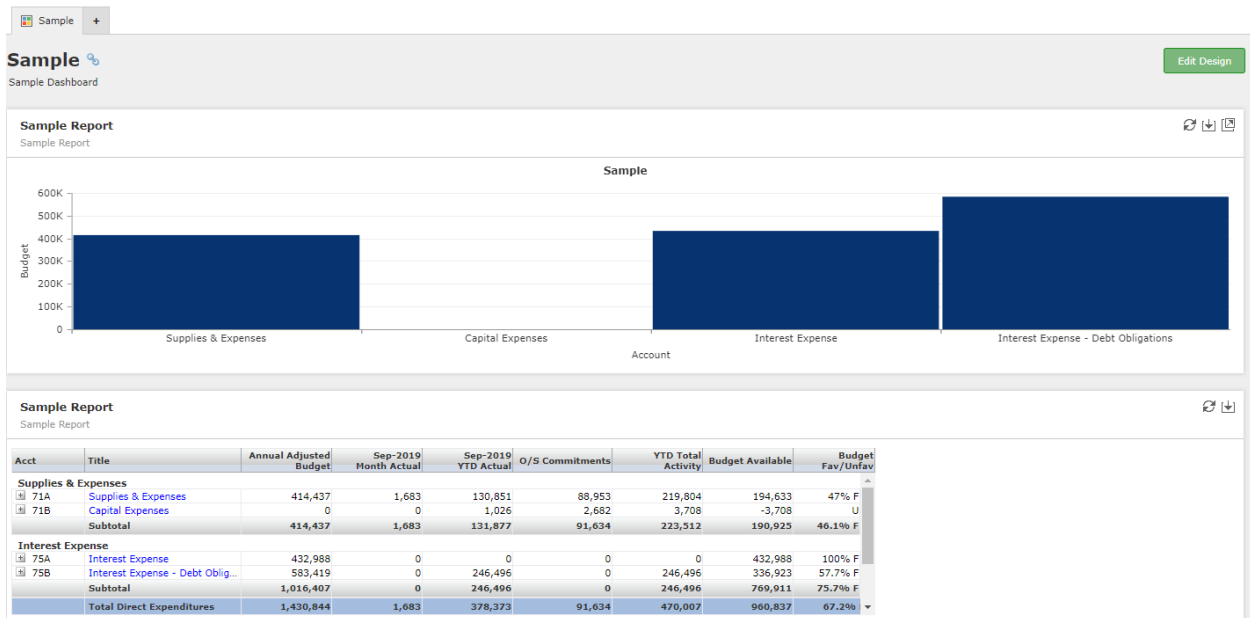
Click on **Edit Design**

Click and drag your choice of graph or grid onto the dashboard "greyed" area that you want it to display.

Your graph/grid will be displayed on the right hand side.

EDITING DASHBOARD ITEMS

▶◀ Shrink Horizontally

🗑 Delete Graph

♻ Refresh

⬇ Export to PDF

⬈ Full Screen

If you want your Dashboard to appear 1st every time you log on to FAST Reporting, click on the **lock**. It is now locked and your dashboard will come up as a homepage when you click on FAST Reporting.