InsightX SaaS Dashboard User Guide

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Chapter 1. Introduction to InsightX

A SaaS analytics dashboard for tracking KPIs and data insights.

InsightX provides real-time data visualization, team collaboration, and secure dashboard sharing for business analysts and managers. It supports modular dashboards, role-based access, and automated report scheduling to streamline business intelligence workflows.

Figure 1. UI Overview

Chapter 2. System Requirements and Supported Browsers

Minimum requirements for using InsightX Dashboard.

Item	Description
Browser	Chrome 100+, Firefox 95+, Safari 14+, Edge 100+
OS	Windows 10+, macOS 10.14+, Linux (Ubuntu 20.04+)
Internet	Minimum 2 Mbps connection recommended
Screen Resolution	1280x800 or higher

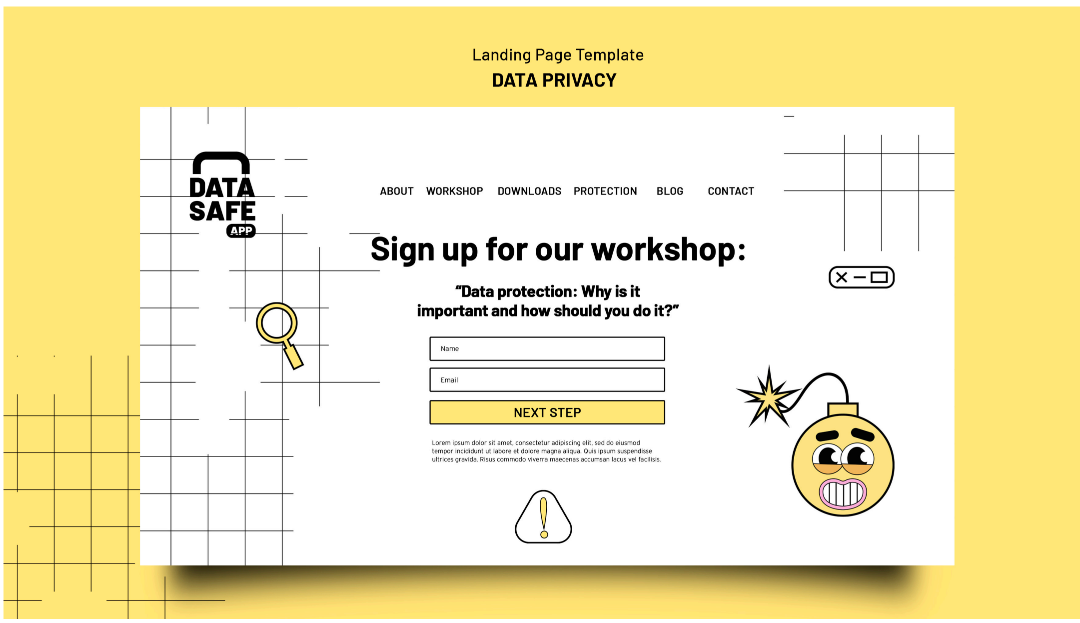
Chapter 3. Logging In and Navigating the Dashboard

Steps to access and explore the InsightX dashboard.

> **Note:**
> Ensure pop-up blockers are disabled for full functionality.

1. Go to https://dashboard.insightx.com and log in using your credentials.
2. Use the left sidebar to access Dashboards, Data Sources, Alerts, and Reports.
3. Hover over each icon to view tooltips describing each module.
4. Click the profile icon in the top-right corner to access personal settings and logout options.

Figure 2. Dashboard Navigation

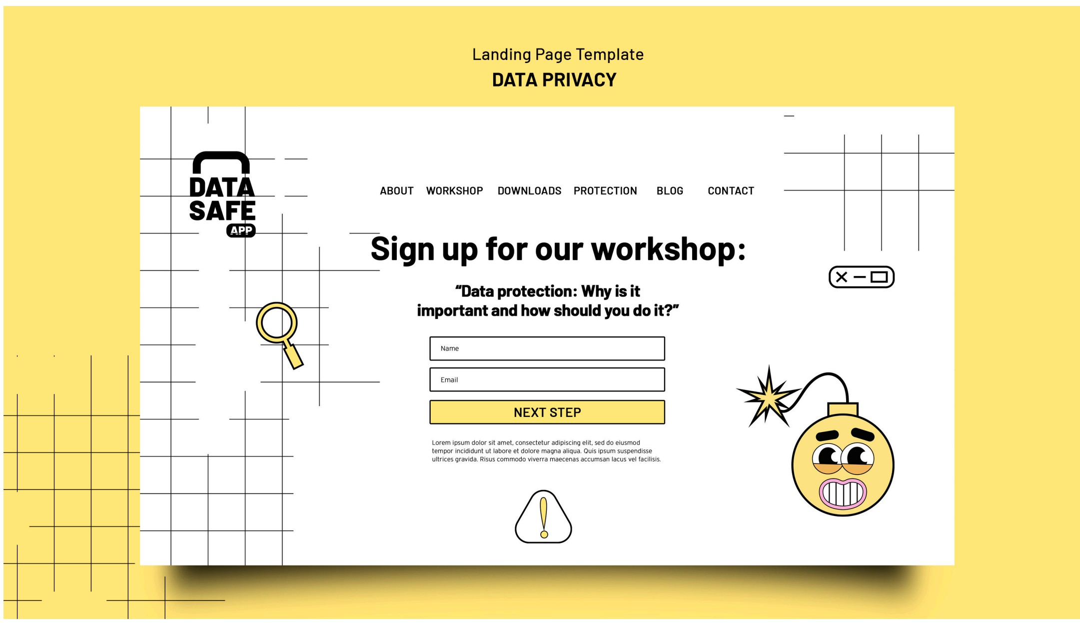


Chapter 4. Adding and Managing Data Sources

Steps to integrate third-party and internal data sources into InsightX.

1. Click on the “Data Sources” tab in the left sidebar.
2. Select “+ Add Source” and choose a source type (e.g., Google Sheets, SQL Database, REST API).
3. Enter connection details or credentials as prompted.
4. Choose synchronization options (Manual / Scheduled Sync).
5. Click “Save” to complete the integration.

Figure 3. Data Source Integration

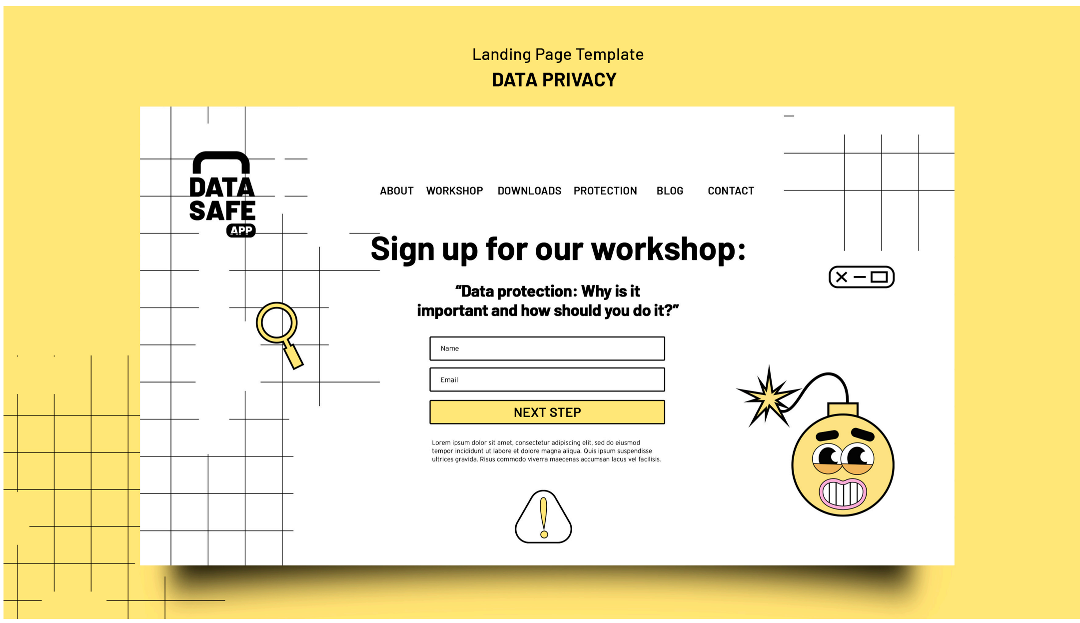


Chapter 5. Creating and Customizing Dashboards

Steps to create custom dashboards for business insights.

1. Navigate to the “Dashboards” tab and click “+ New Dashboard”.
2. Enter a dashboard name and select a layout (grid, columns, or freeform).
3. Add widgets by dragging from the toolbar (e.g., charts, tables, KPIs).
4. Configure each widget with data source and visual options.
5. Click “Save” to publish your dashboard.

Figure 4. Dashboard Editor



Chapter 6. Exporting Reports and Sharing Dashboards

Steps to download reports and share dashboards with team members.

1. Go to the **Reports** tab and open the report you want to export.
2. Click the **Export** button and choose the desired format (PDF, XLS, CSV).
3. To share a dashboard, open the dashboard and click **Share**.
4. Choose whether to generate a public link or restrict by email/domain.
5. Click **Send** or **Copy Link** to distribute the dashboard.

Figure 5. Export Panel

Chapter 7. Managing Users and Permissions

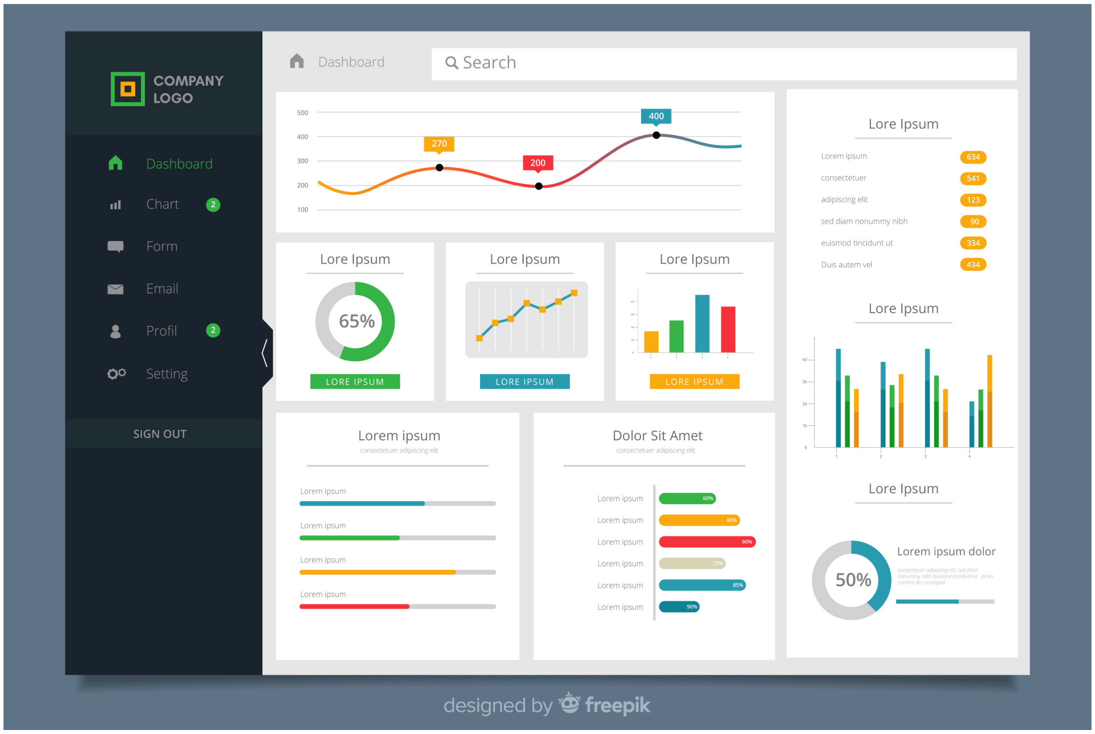
Steps to add, edit, or remove users with assigned roles.

> **Notice:**
> This section applies to Admin users only.

1. Click the **Settings** icon and go to the **Users** tab.
2. Click **+ Add User** and enter the email address of the new member.
3. Select the role: *Viewer*, *Editor*, or *Admin*.
4. Click **Invite** to send an access email.
5. To edit permissions, click the **gear icon** beside the user's name and select **Edit Role**.

Visual Example

Figure 6. Users & Permissions Tab



Chapter 8. Glossary of InsightX Terms

Key terms used in the InsightX Dashboard platform.

Dashboard

A visual layout that displays multiple widgets to monitor business metrics.

KPI

Key Performance Indicator — a measurable value used to track success.

Data Source

Any external system or file (e.g., Google Sheets, SQL database) that feeds data into InsightX.

Widget

A block of data visualization (e.g., chart, table, number) that can be added to a dashboard.

Chapter 9. Frequently Asked Questions (FAQs)

Common issues and solutions for InsightX users.

Can I use InsightX on mobile?

Currently, InsightX is optimized for desktop browsers only. A mobile app is under development.

Why is my data not syncing?

Check your internet connection and verify that the data source credentials have not expired.

How can I reset my password?

Go to the login screen, click **Forgot Password**, and follow the reset link sent to your email.