DASHBOARD APBUILDER – VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

Contents

Overview

The CaseWorthy *Dashboard apBuilder* video series includes information about the following topics:

- An overview of the Dashboard apBuilder
- The interface, including the Navigation Menu along the left of the page
- The Widget Toolbox and its possibilities for customizing your dashboard
- Greater detail on configuring Query Widgets
- And a separate video to configure the charts within the Query Widget

This first video highlights important concepts about the Dashboard apBuilder.

What is a Dashboard?

Dashboards are configurable workspaces in the application and portal where a variety of tools can be used to create widgets which allow the User to interact and view data that is entered in many places throughout the application.

What is the Dashboard apBuilder?

The Dashboard apBuilder is used to configure the look and functionality of a dashboard in both the CaseWorthy application and on portals. This apBuilder is unique in that it allows you to create and control how Users interact with several functionalities within one specific workspace.

IMPORTANT: Please know, this video series is specific to configuring dashboards in the application. While these same widgets are used in portals, information on widgets that are specific to portals is covered in the Portal Functionality guide.

Customizing Dashboards

It is important to remember a couple of things about customizing dashboards.

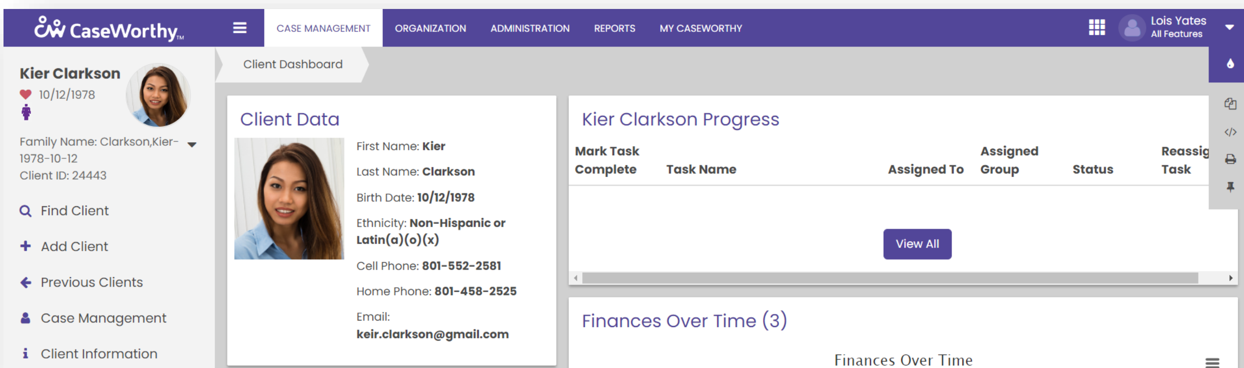
- Baseline dashboards cannot be changed.

- You do have the ability to copy a baseline role, which then creates all custom dashboards that can be altered. However, the forms will remain as the baseline versions, unless individually changed to custom versions.
- In other words, if you create a new custom role, all of the dashboards are easily customizable.

Accessing the Dashboard apBuilder

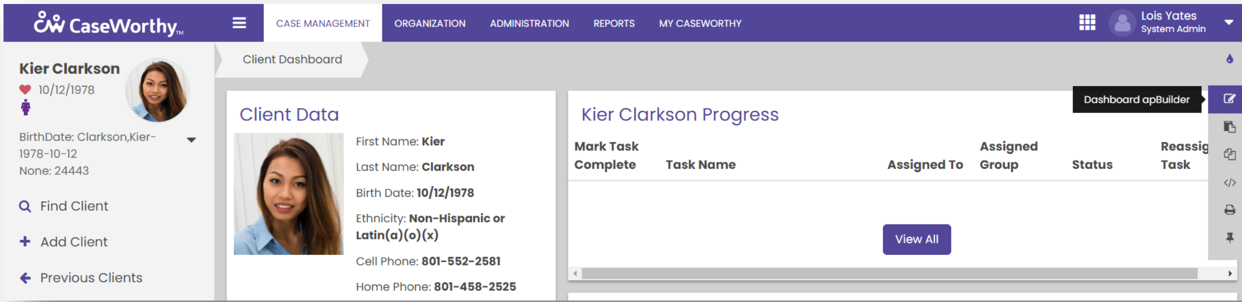
The Dashboard apBuilder is available from the droplet menu on the dashboard you would like to customize.

Here, we are in the All Features role, which is baseline. This dashboard is also baseline. Notice the Dashboard apBuilder is not available off the droplet menu.

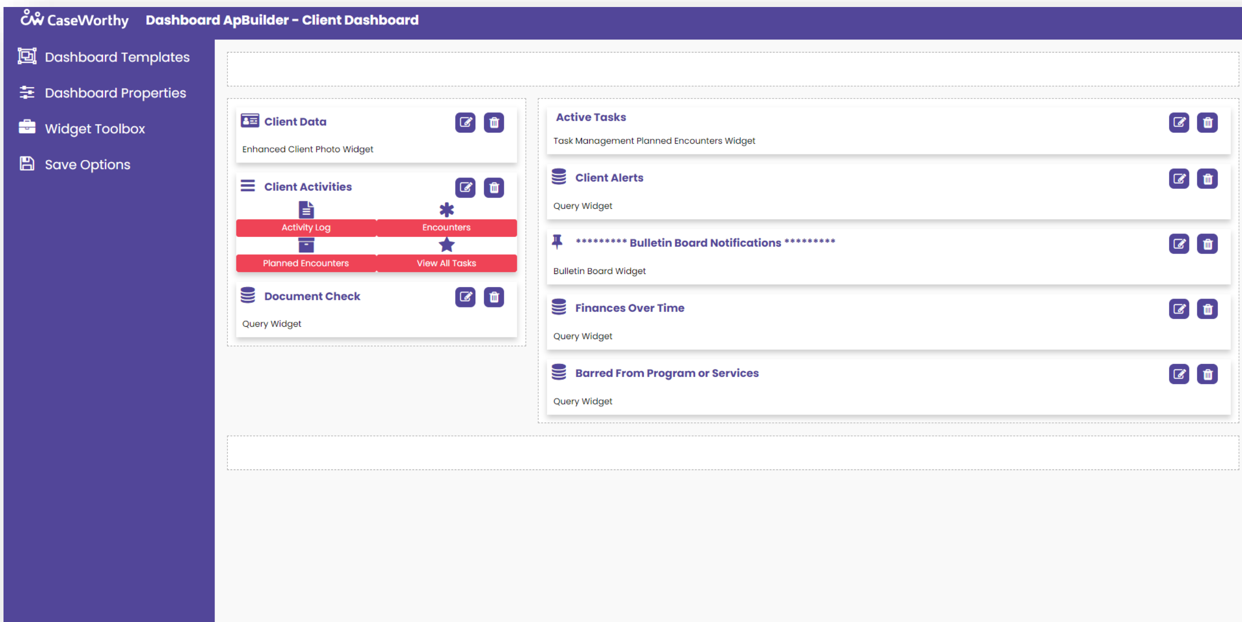


Let's switch over to a custom role where I have configured the role with a custom copy of this same dashboard.

Since this is a custom dashboard, it can be accessed and customized. Therefore, the Dashboard apBuilder is available here off the droplet menu.



The Dashboard apBuilder opens in a new window.



This concludes the *Overview* video. Next in the series, we will explore the Dashboard apBuilder interface, including the Navigation Menu and its contents.

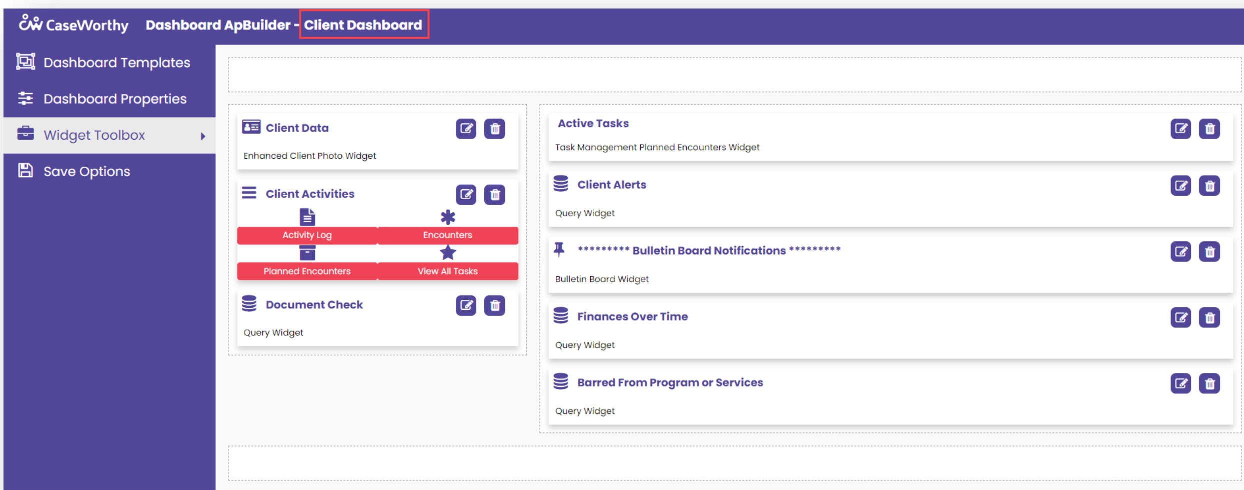
Interface

This 2nd video of the CaseWorthy *Dashboard apBuilder* video series explores the interface, including the Navigation Menu and its contents.

The Dashboard apBuilder interface is similar to the CaseWorthy application for ease-of-use.

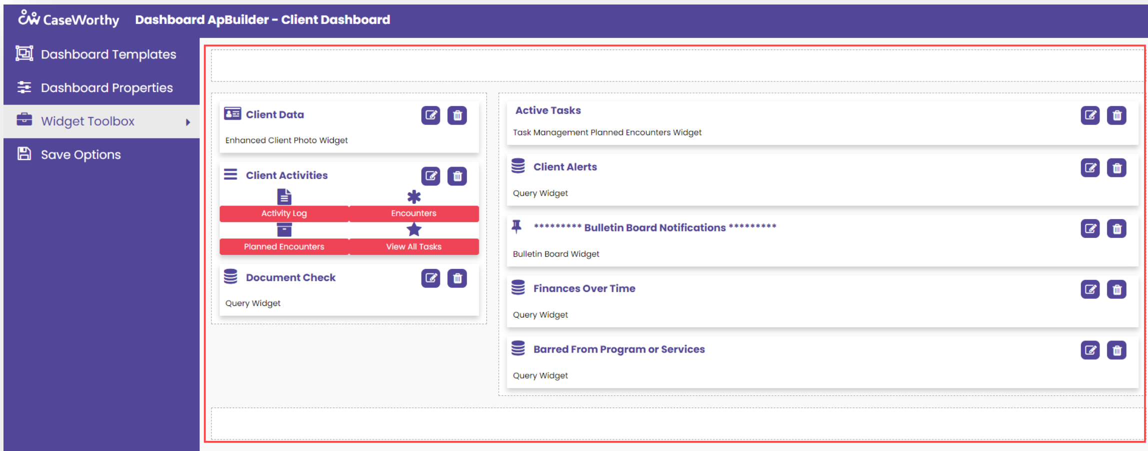
Title

First, the title of the dashboard is displayed along the top of the page. This is the title the dashboard was given when it was initially created or copied and can be changed from Dashboard Properties.



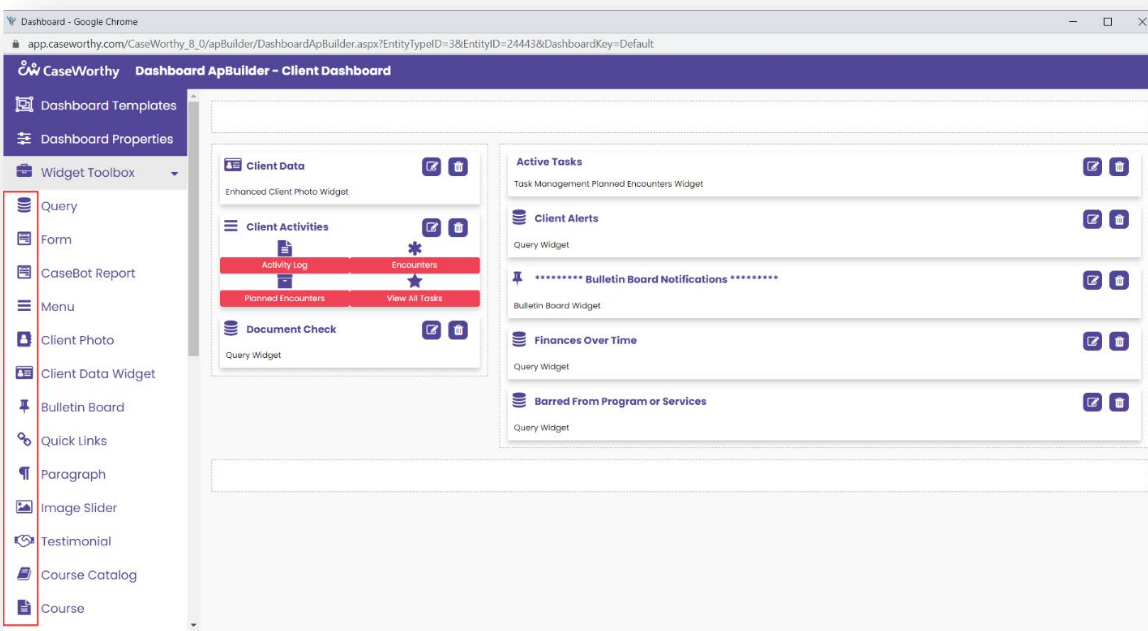
Layout

The layout of the current dashboard displays in the workspace, including all existing widgets. These widgets can be moved by using the drag-and-drop feature.

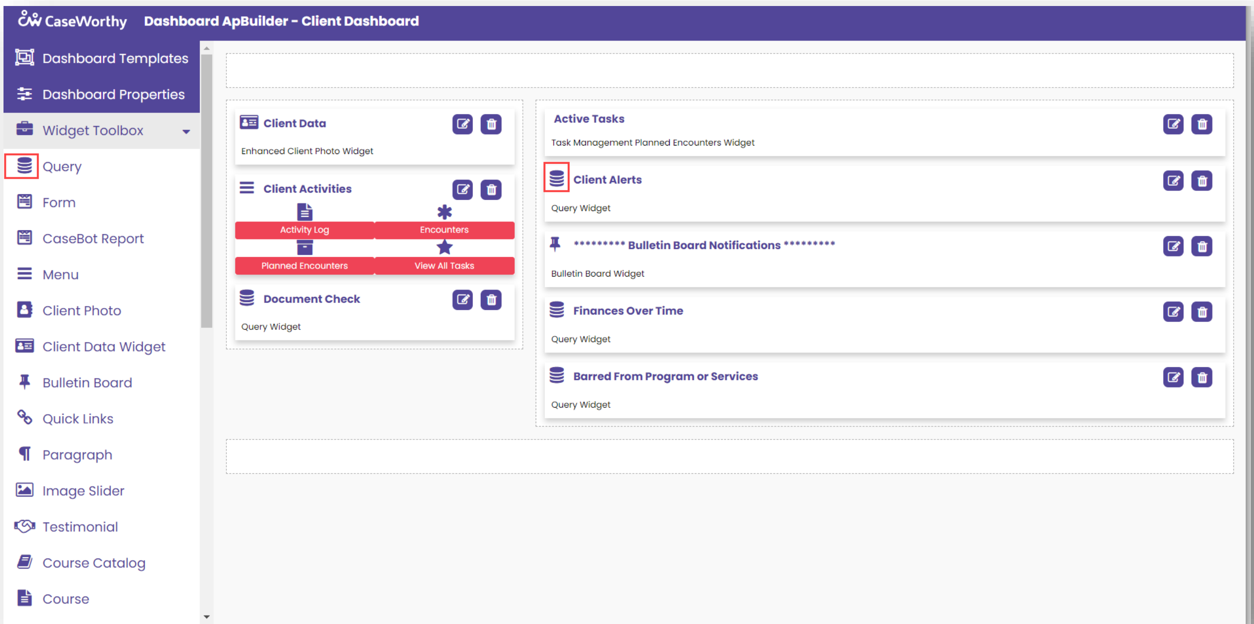


Widget Type

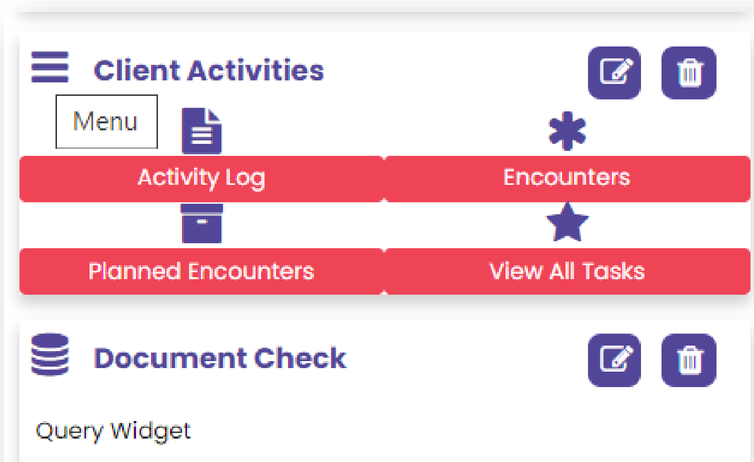
Notice that each type of widget within the Widget Toolbox is denoted with a specific icon.



Each widget on the dashboard is denoted with the icon that relates to the widget type found in the toolbox. For example, we can determine the Client Alerts widget is a query based on the icons displayed here.

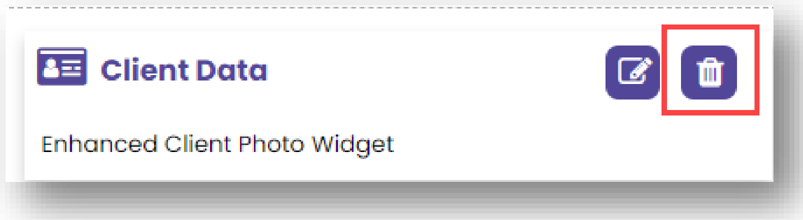


You can also hover over the icon in any widget to display the type at any time. For example, we can see Client Activities is a Menu widget here.



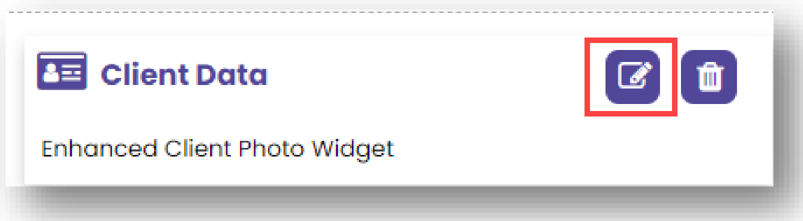
Delete a Widget

To delete an item from the dashboard, click the trashcan icon found within the widget. No confirmation message displays to verify your action, so please be mindful when deleting widgets from the apBuilder.



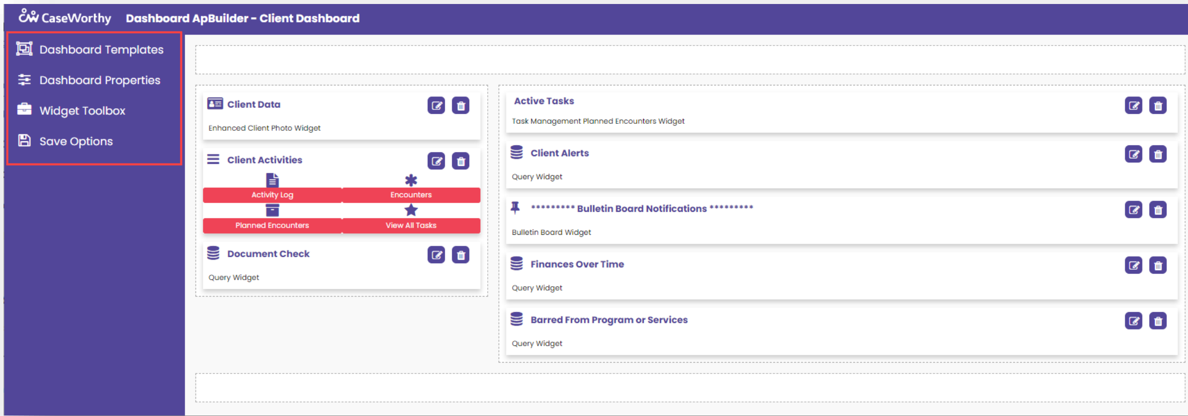
Edit Widget Properties

Each widget consists of its own properties, some are simple, and others include multiple icons and menu selections that require careful configuration. These are accessed from each widget's properties, which are discussed in the next video of this series.



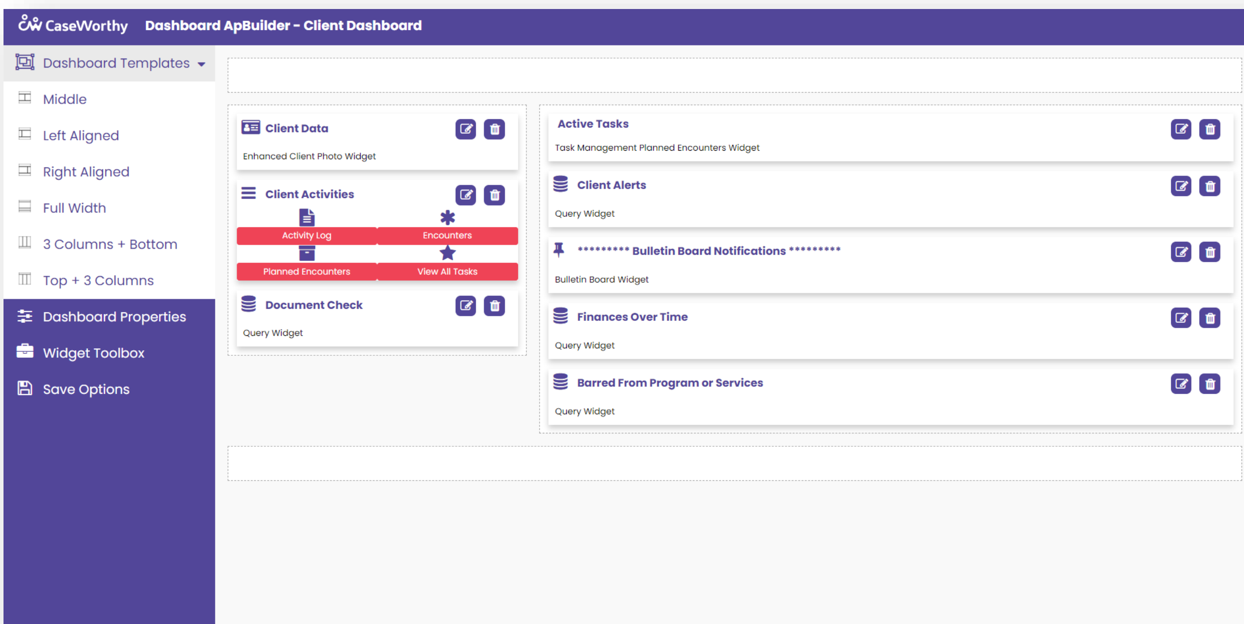
Navigation Menu

Along the left of the apBuilder is the Navigation Menu that consists of four menu items.



Dashboard Templates

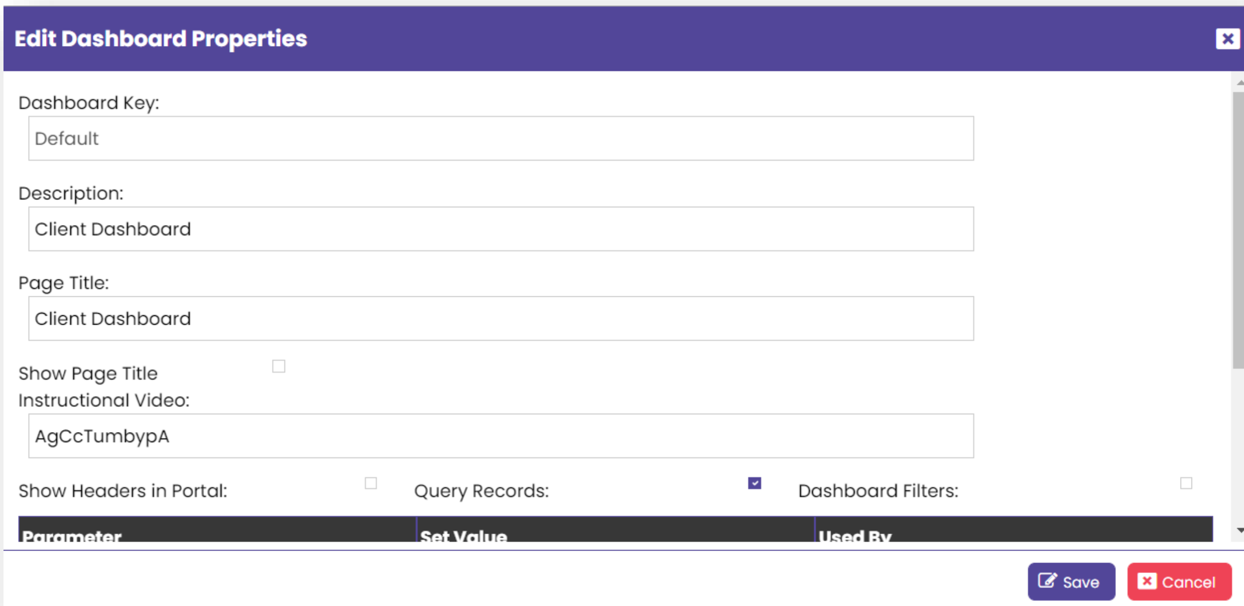
The first menu item is Dashboard Templates, which is used to establish the layout of the dashboard.



Here, you can select a predetermined arrangement for your widgets. Each of the options presents a preview. Options include aligning all widgets in the middle, to the left, or to the right of the page. You can also choose a layout where widgets are spread evenly across the full width of the page, broken up evenly within three columns, or separated within three columns, while also including a header row.

Dashboard Properties

The next option in the Navigation Menu is Dashboard Properties.



Edit Dashboard Properties is where properties and settings are managed for the dashboard as a whole.

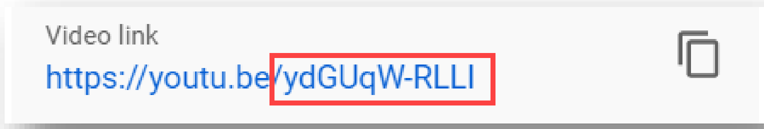
The **Dashboard Key** is generated when the dashboard is created and cannot be changed.

The text entered for the **Description** can be used to search for the dashboard and is typically a better identifier than the key.

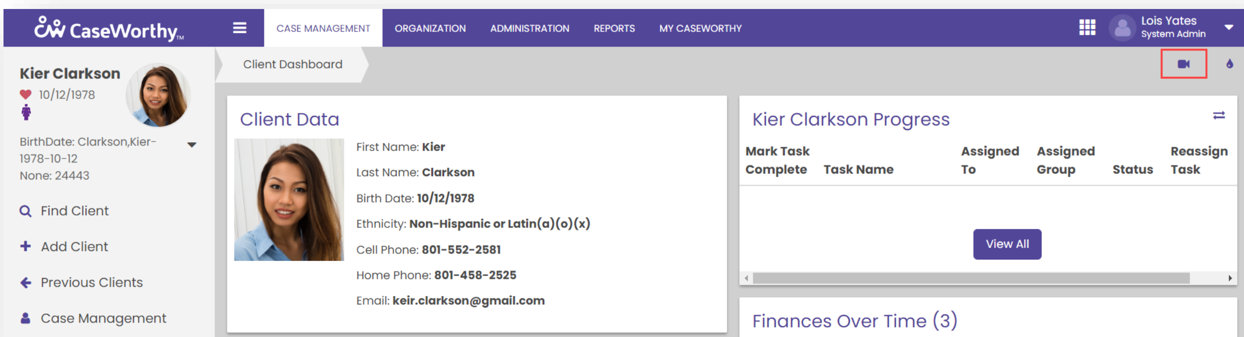
The **Page Title** displays the name of the dashboard for the User and can be changed here.

Show Page Title allows you to hide the title from view. It is not initially selected, which displays the title. Select the option to hide the title from view if needed.

As with forms, an **Instructional Video** can be linked to the dashboard to quickly offer accessible information for Users. Once a video is uploaded to YouTube, paste the final portion of the YouTube URL in this field.



Once an instructional video is saved here, a video icon will appear next to the droplet menu for Users to access on the dashboard.



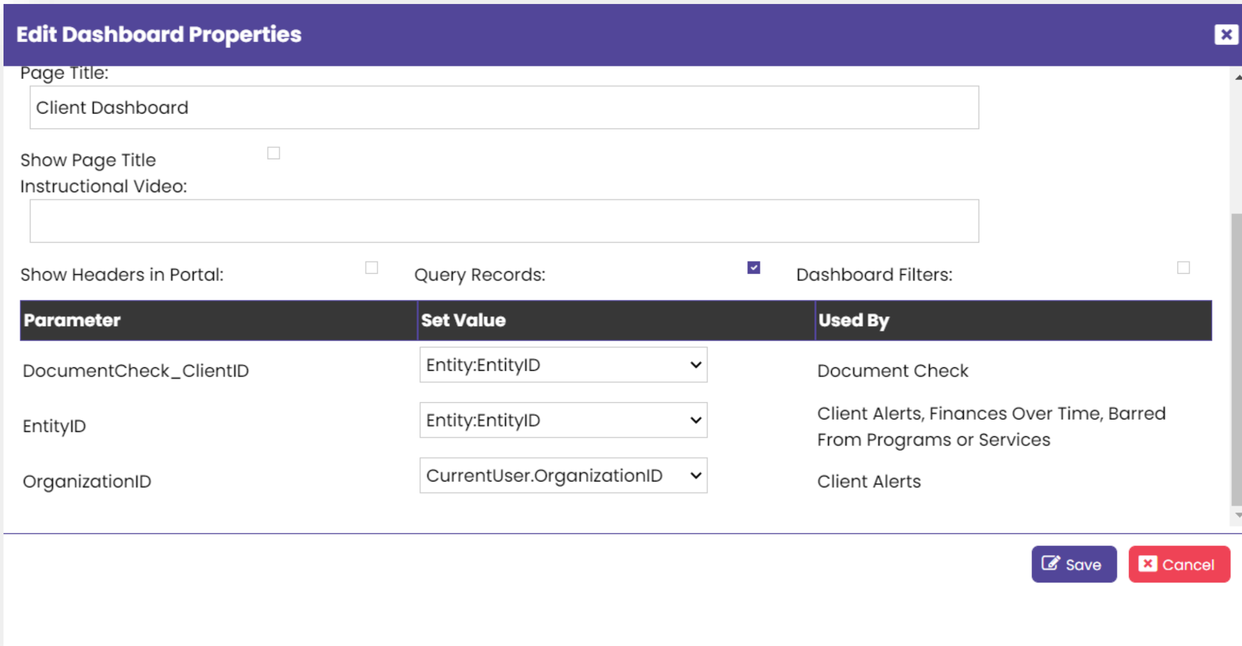
Show Headers in Portal, **Query Records**, and **Dashboard Filters** do not apply to the application.

Parameter Set Values

Next, the parameter set values should be selected. These provide the opportunity to enter entity and current User information to have the queries and forms present desired data.

The **Parameter** list is automatically generated based on the queries and forms included on the dashboard. The values selected are dependent upon your needs for this dashboard and can be changed here.

The **Used By** column displays the query or form that uses the parameter.

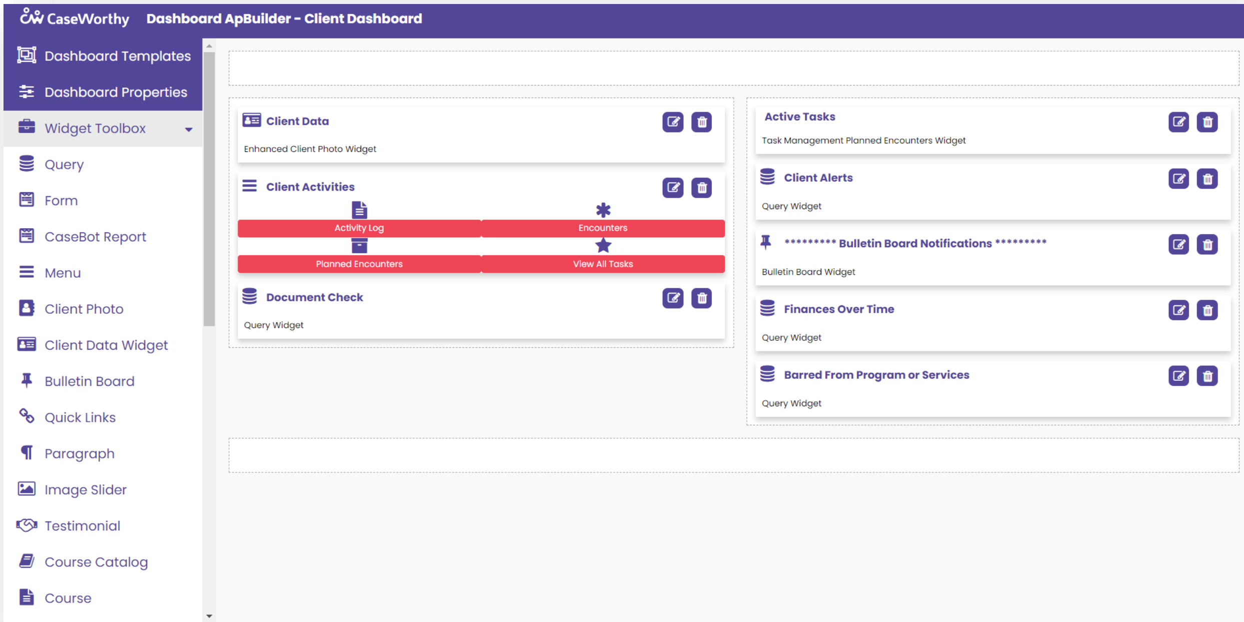


IMPORTANT: As you may continue to add other query and form widgets to the dashboard, it is important to remember to access these properties again to confirm the set values are accurate.

It is also important to note, multiple queries and forms may require the same parameter, but the set value only needs to be entered once. For more information on configuring query widgets further, review the *Widget Toolbox* video in this series. Forms are explored later in this video.

Widget Toolbox

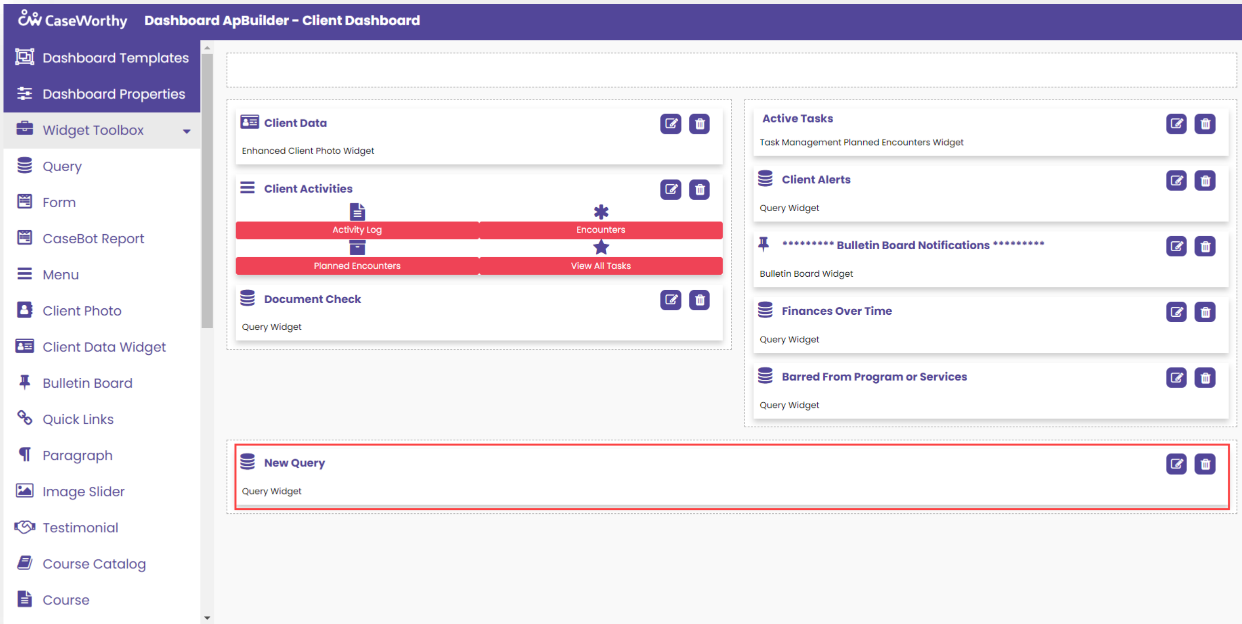
The next option in the Navigation Menu is the Widget Toolbox.



The Dashboard apBuilder primarily incorporates the use of widgets which are items that can be placed on a dashboard that can then be configured to meet your specific needs in both the CaseWorthy application and customer portals. Each dashboard widget functions differently.

All the widgets can be used to configure portals. This series covers the widgets that are used for dashboards within the application.

All of the widgets listed in the toolbox can be dragged and dropped onto the dashboard into any section. The widgets can also be easily moved in the same manner at any time within the Dashboard apBuilder.



Once the widget is dropped in its preferred location, the section will automatically format to accommodate the widget based on the chosen layout.

For further information on how to add and configure specific widgets on your dashboard, see the *Widget Toolbox* and *Query Widget* videos in this series.

Save Options

The last item in the Navigation Menu is Save Options which allows you to:

- **Save and Close**, which saves all of your recent changes and then closes the Dashboard apBuilder. Your new dashboard will automatically refresh.
- **Save and Keep Editing** saves your recent changes and allows you to keep working in the Dashboard apBuilder.
- **Cancel** will not save any recent changes and automatically closes the Dashboard apBuilder.

This concludes the *Dashboard apBuilder Interface* video. Next in the series, we will explore the Widget Toolbox and how to use the available widgets to customize your application’s dashboards.

Widget Toolbox

This 3rd video of the CaseWorthy *Dashboard apBuilder* video series explores the Widget Toolbox and how to use these elements to customize your application's dashboards.

The Widget Toolbox includes an abundance of options available for customizing your dashboard. The same apBuilder tool is used to configure dashboards in the CaseWorthy application as well as customer portals. This video series covers the widgets that work in both.

Remember, to add any of the following widgets to the dashboard, first click, drag, and drop the widget to the desired location on the dashboard. Then, access the properties to configure the widget.

For Query and Form widgets, confirm the parameters are set correctly within Dashboard Properties.

Query

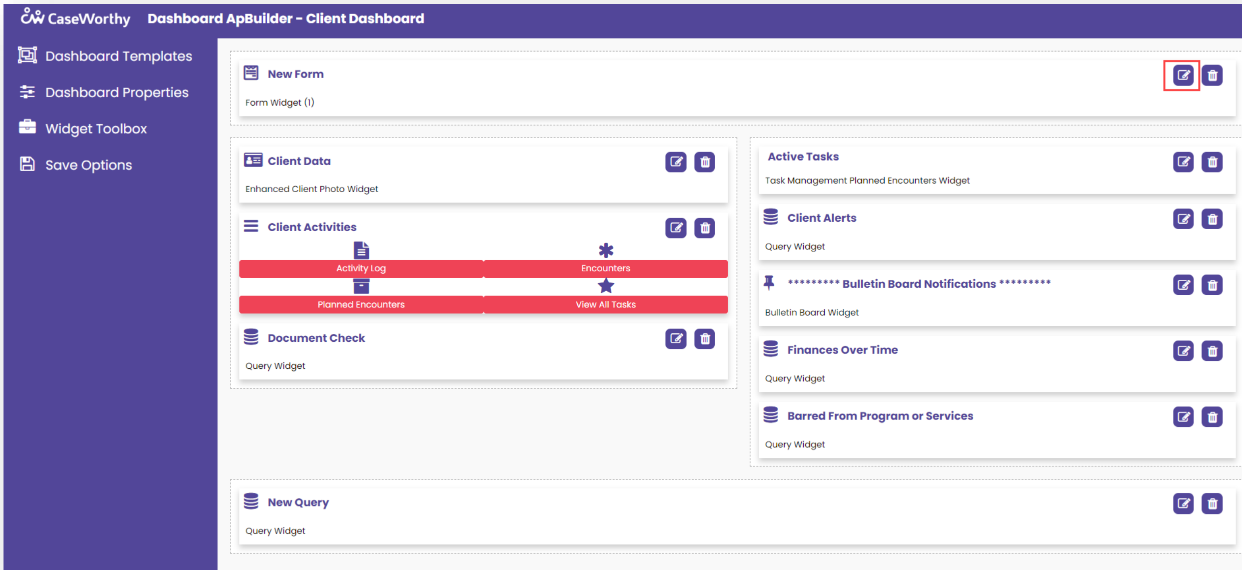
The first widget is Query, which is a powerful and dynamic tool used to easily customize your dashboard for your specific needs. Because this is a commonly used tool that requires a great amount of configuration, we will more fully detail this widget in the next 2 videos of this series the *Query Widget and Query Widget Charts.*

Form

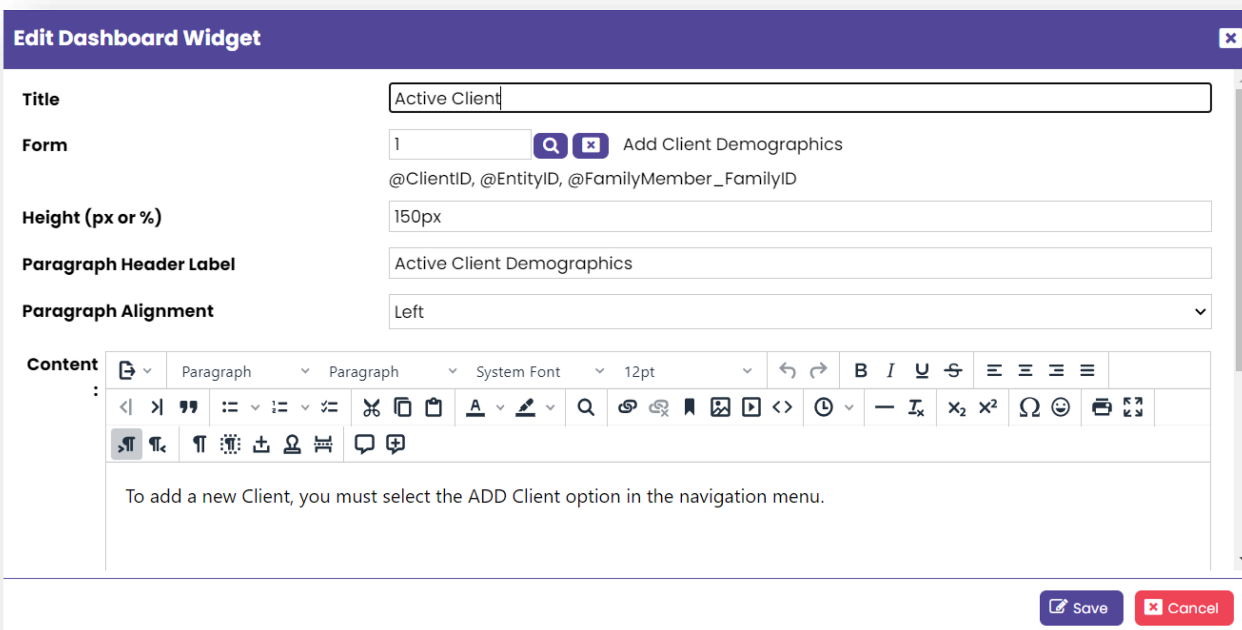
Moving on to the next dashboard widget, Form.

This option renders a form on the dashboard, where data can quickly be entered and saved.

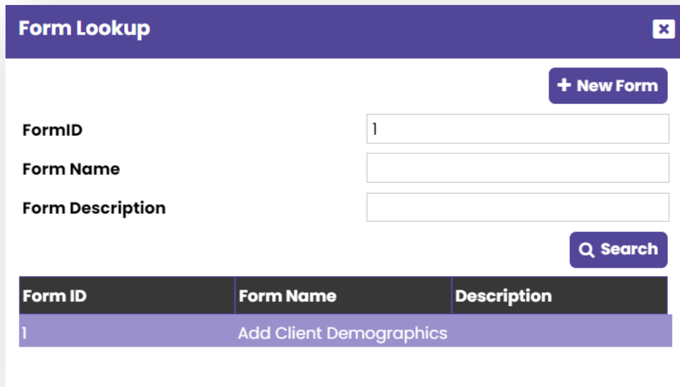
Add the widget to the dashboard and then open the properties.



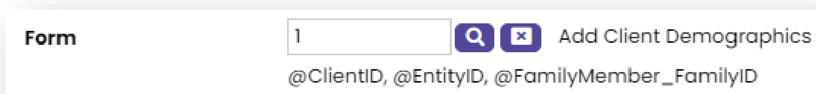
Within the properties, the **Title** appears as the header for the widget. It will initially autofill with 'New Form' but can easily be changed.



Use the **Form** lookup to search for an existing form by ID, name, or description.



The form's necessary parameters are listed below. We will address them shortly.



The **Height** determines how much space the widget will occupy on the dashboard. A scrollbar will be included so the entire form can be viewed.

Enter a number for measurement in pixels.

Use **Paragraph Header Label** to enter additional text to display within the widget next to the form.

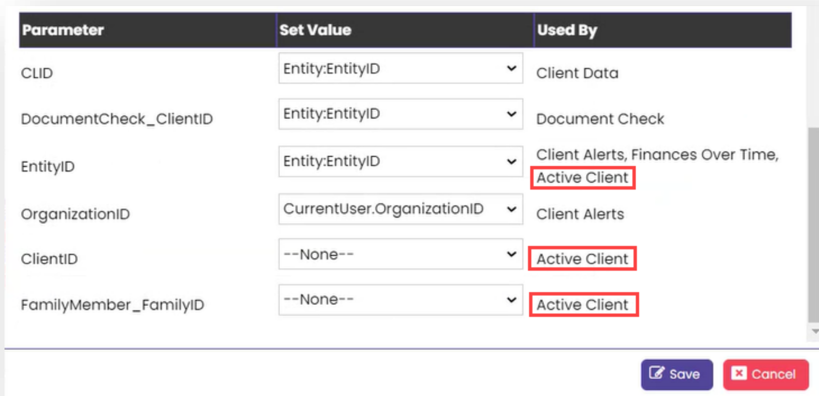
Choose **Paragraph Alignment** to determine where the **Paragraph Header Label** text should display.

Options include 'Left' and 'Top'. If the option is set to 'None', the text will not display.

Additional static text can be entered to display to the left of the form, if needed.

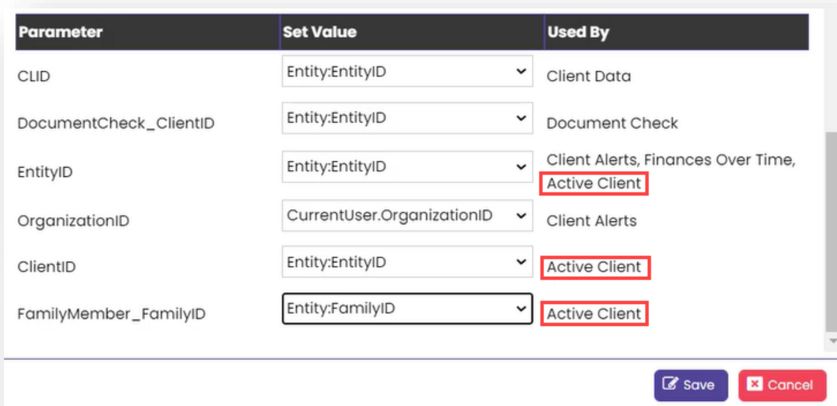
Once saved, remember to access Dashboard Properties to confirm the parameters are set correctly.

The form uses EntityID as well, but the parameter is already set from other items.



Parameter	Set Value	Used By
CLID	Entity:EntityID	Client Data
DocumentCheck_ClientID	Entity:EntityID	Document Check
EntityID	Entity:EntityID	Client Alerts, Finances Over Time, Active Client
OrganizationID	CurrentUser.OrganizationID	Client Alerts
ClientID	--None--	Active Client
FamilyMember_FamilyID	--None--	Active Client

Save Cancel

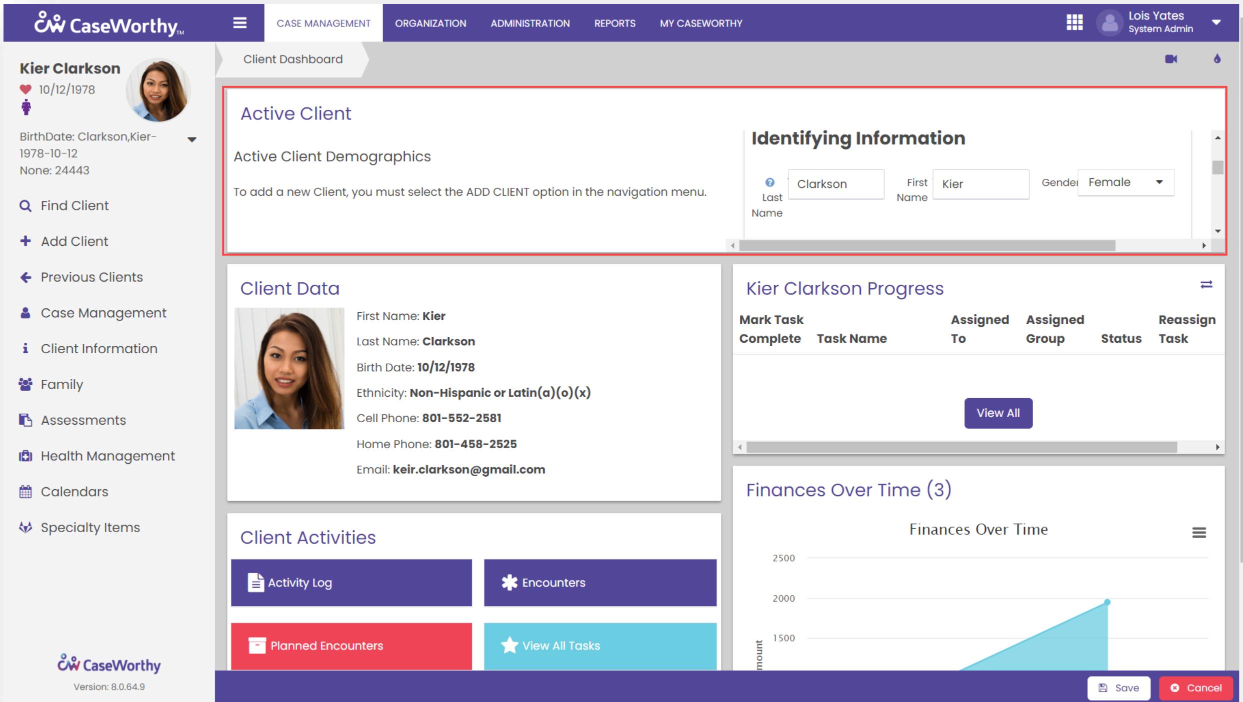


Parameter	Set Value	Used By
CLID	Entity:EntityID	Client Data
DocumentCheck_ClientID	Entity:EntityID	Document Check
EntityID	Entity:EntityID	Client Alerts, Finances Over Time, Active Client
OrganizationID	CurrentUser.OrganizationID	Client Alerts
ClientID	Entity:EntityID	Active Client
FamilyMember_FamilyID	Entity:FamilyID	Active Client

Save Cancel

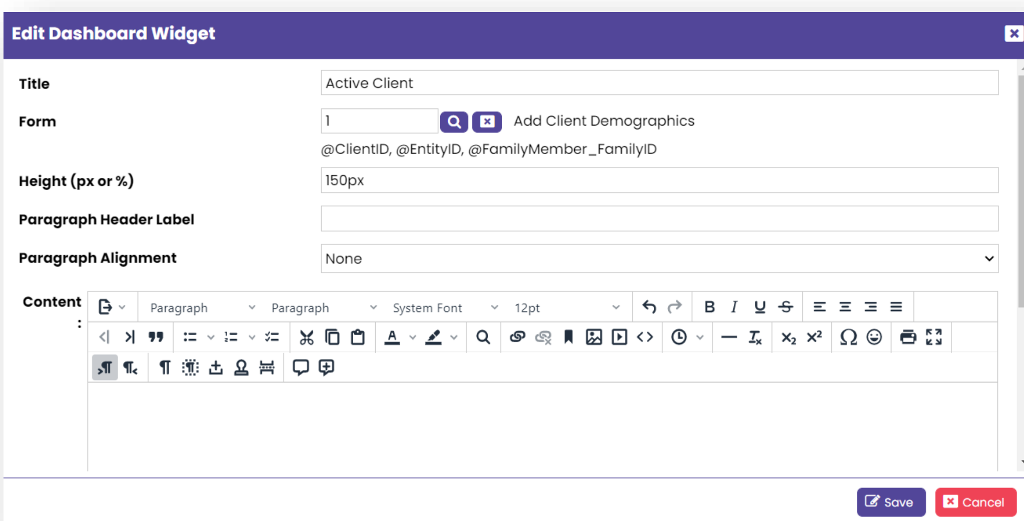
Now that we have configured our new Active Client widget, let us save our changes to the dashboard.

We added the widget to the top of the *Client Dashboard*, and this is how it appears once saved.

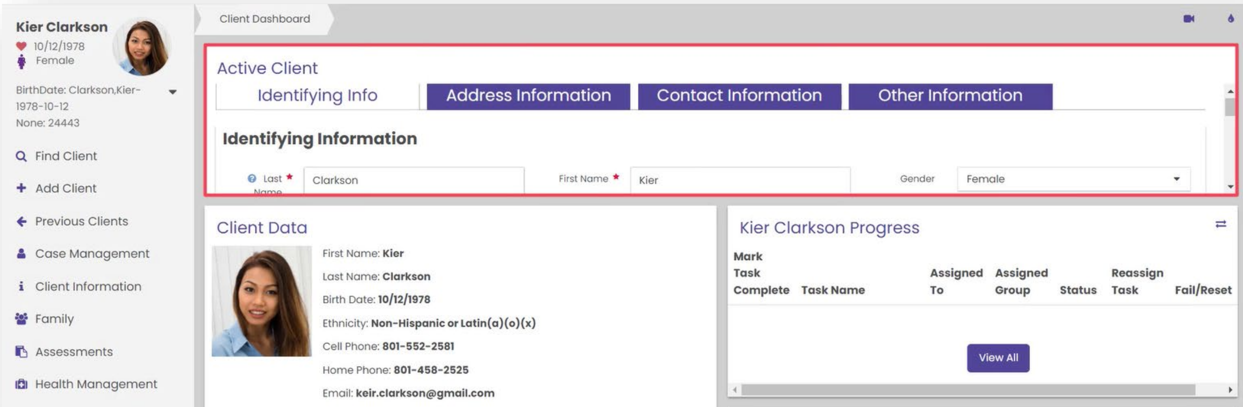


How might the widget display if we change some of the properties?

Let us remove the paragraph header, alignment, and content text.



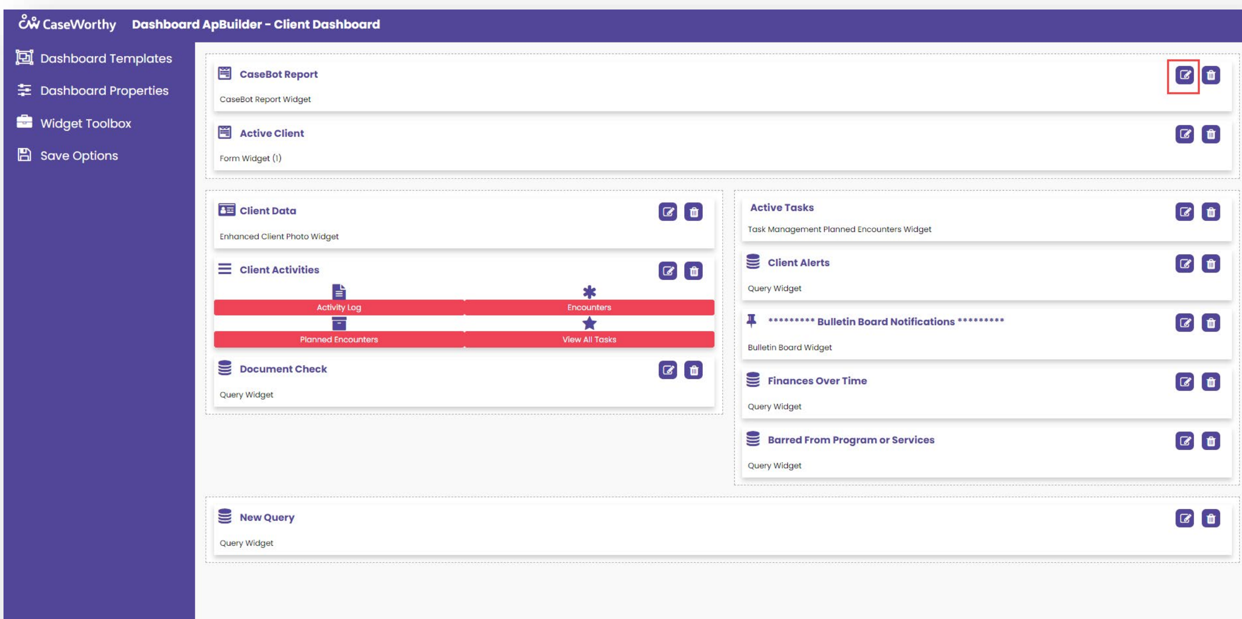
The form now displays within the entire length of the dashboard.



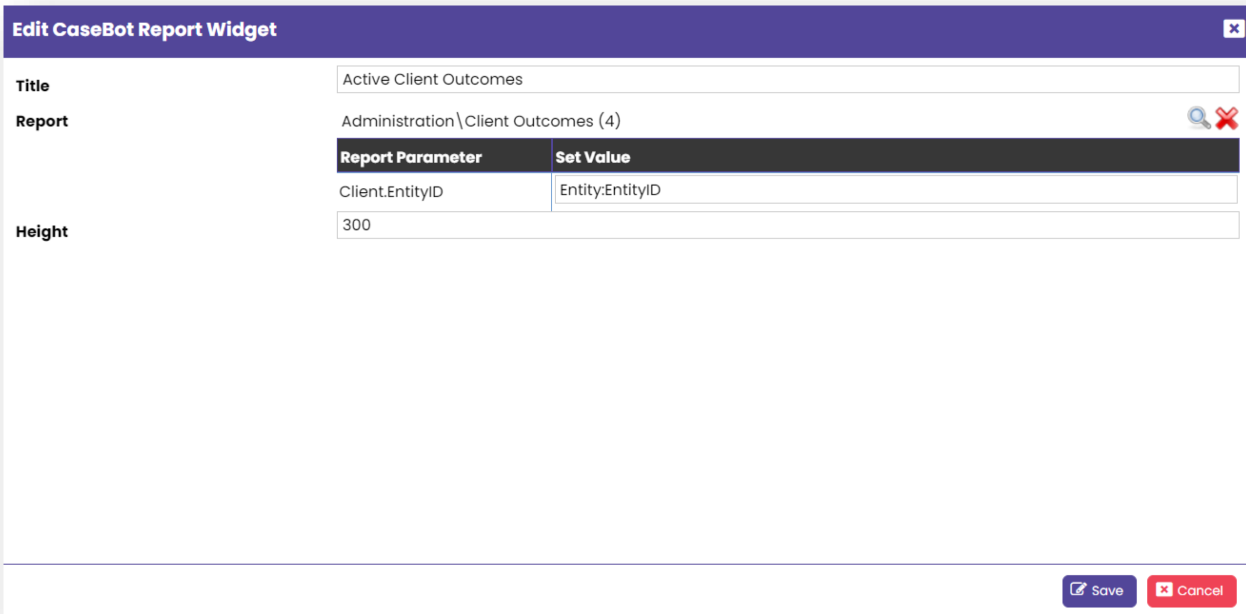
CaseBot Report

The next available widget in the Navigation Menu is CaseBot Report.

This displays a *CaseBot Express Report* on the dashboard.



Within the properties, the **Title** appears as the header for the widget. It will default to 'CaseBot Report' but can easily be changed.

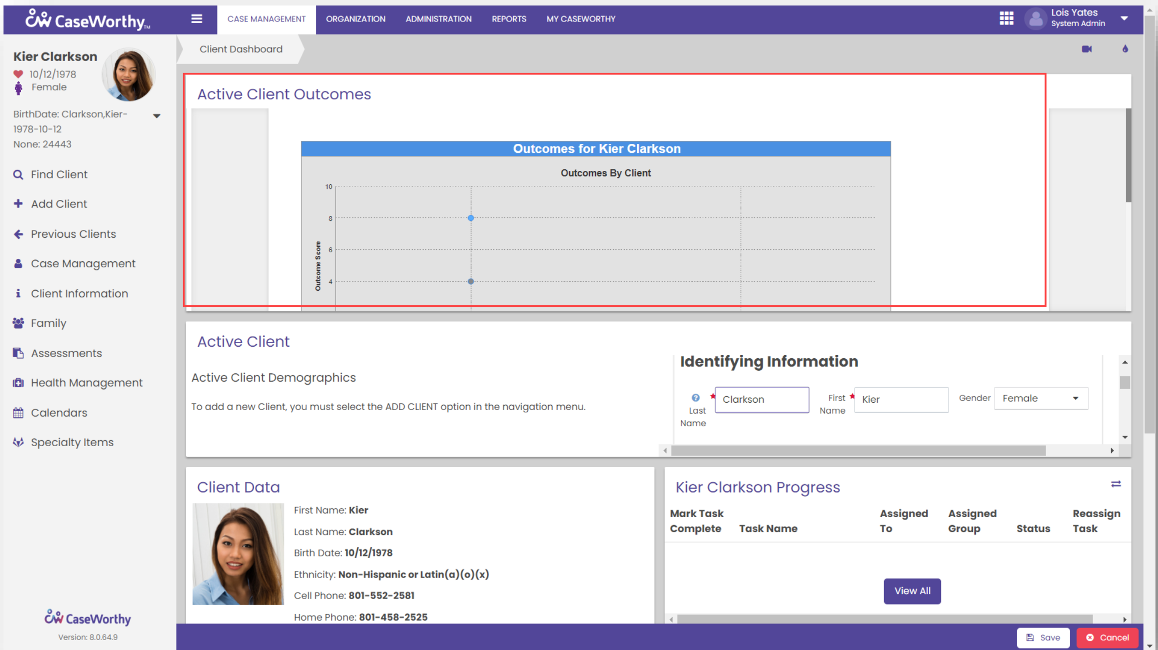


Use the Report lookup (magnifying glass icon) to select from a list of existing express reports that can be filtered by **Report Folder** or **Report Type**.

Now, the report parameters will display below and must be set. The parameter necessary for this report is Client.EntityID. Since we want to display the report based on the active Client, we will set the value as 'Entity.EntityID'.

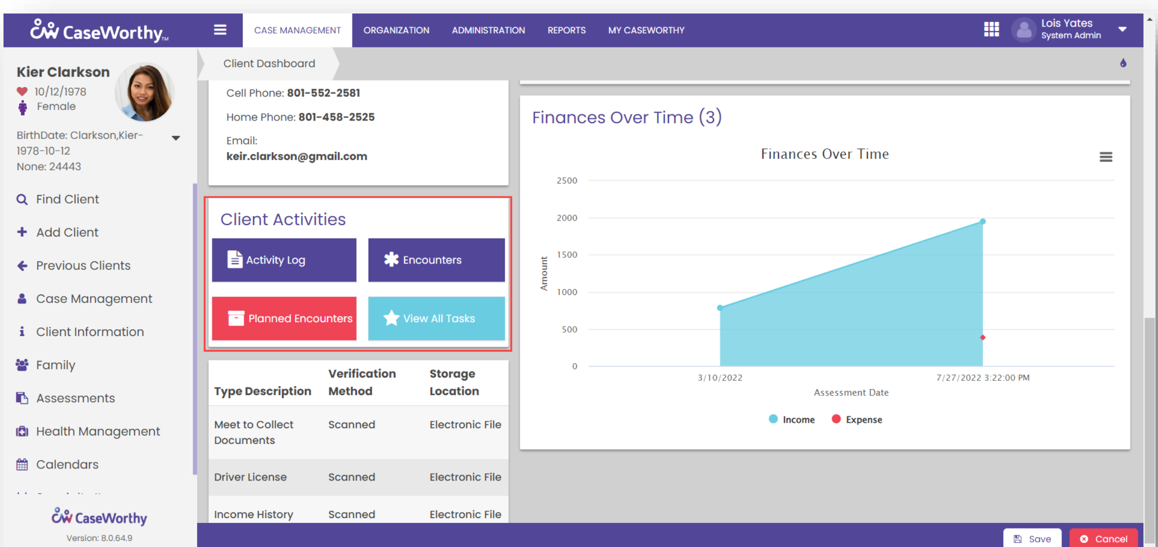
The **Height** determines how much space the widget will occupy on the dashboard. A scrollbar will be included so the entire report can be viewed. Enter a number for measurement in pixels.

I added the widget to the top of my dashboard, and this is how it appears once saved.



Menu

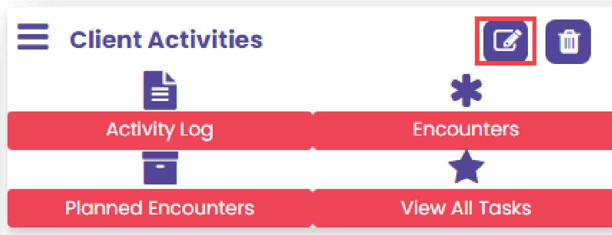
The Menu widget is also commonly used on dashboards.



Menu options are popular as they simplify the experience for the User by sparing them from searching for items within the application Navigation Menu. The links can be grouped in a logical way that suits the User's needs.

Users will click these links on the dashboard to easily navigate to other forms, workflows, and dashboards within the application.

The icons and links inside the widget are configured within the properties.



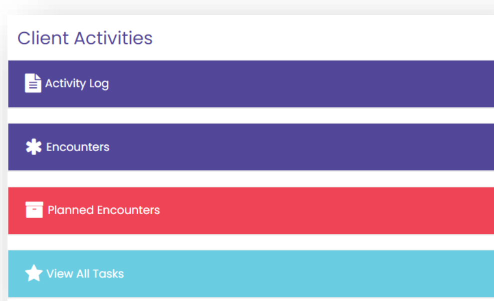
Since this was an existing widget, the properties have already been set up.

The **Title** should be a term used to categorize the similar functionality of the included links. If a title isn't necessary, this can be left blank. We will leave the title as 'Client Activities'.

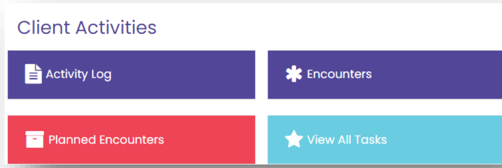
The **Header Color** can be changed to a multitude of colors.

Items Per Row is the number of buttons that display per row inside the menu widget, as well as how the items will format.

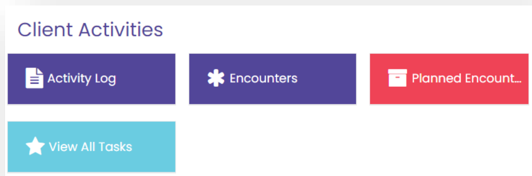
I will enter '1' here, and the buttons will appear as a single column centered within the widget



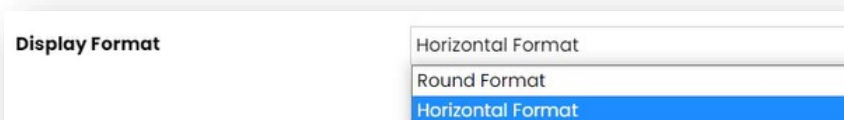
If I were to enter '2', they will display two per row like so.



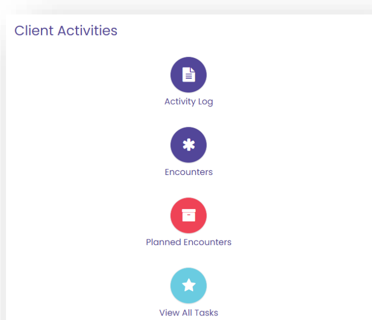
And if I had entered '3', the buttons would display three per row as seen here.



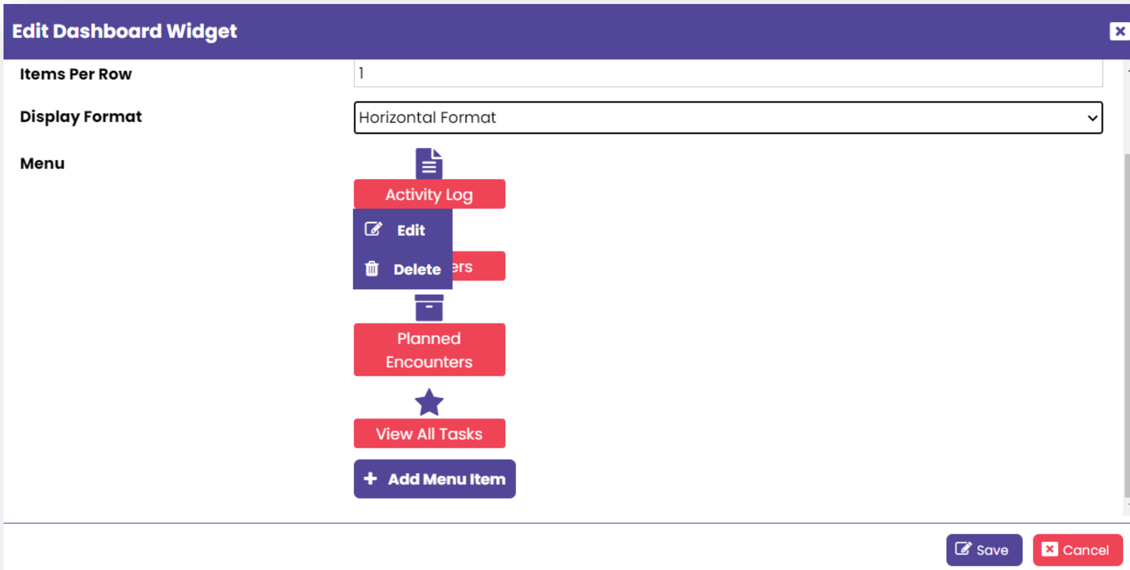
The **Display Format** allows you to display the links in 'Horizontal Format', which displays them as rectangular buttons which contain the icon and label. We saw this in the previous examples.



If you select 'Round Format' here, the links display as round buttons with icons and the label below.



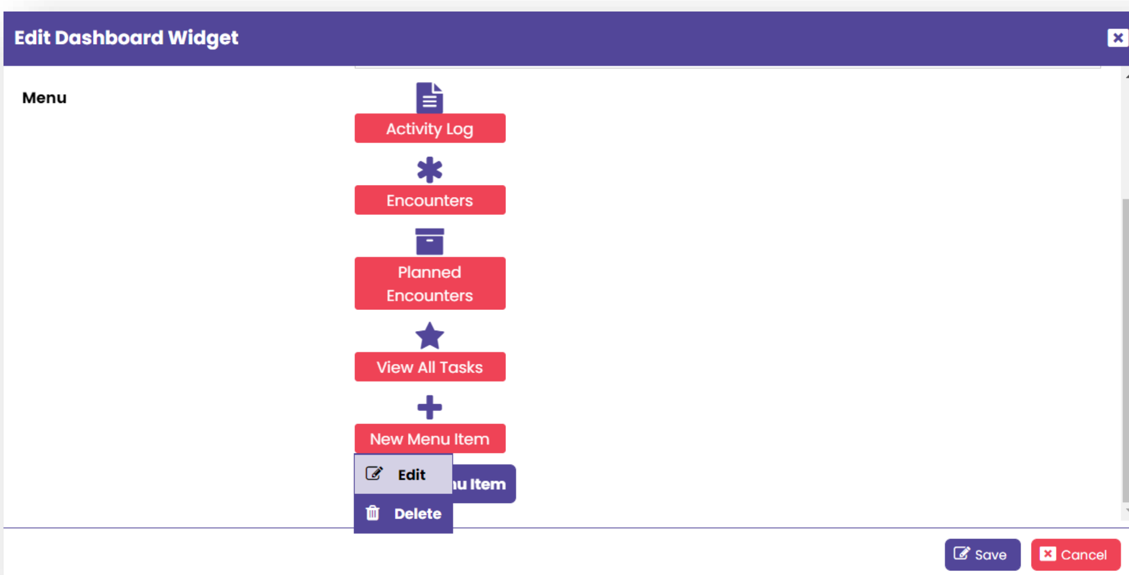
To change the settings for existing menu links, including the title, icon image, color, link, or parameters, select **Edit** from the link's menu.



To remove the link from the menu, select **Delete**.

You can also add a new menu item to the widget here.

The new link displays as 'New Menu Item'. Let us Edit these properties.



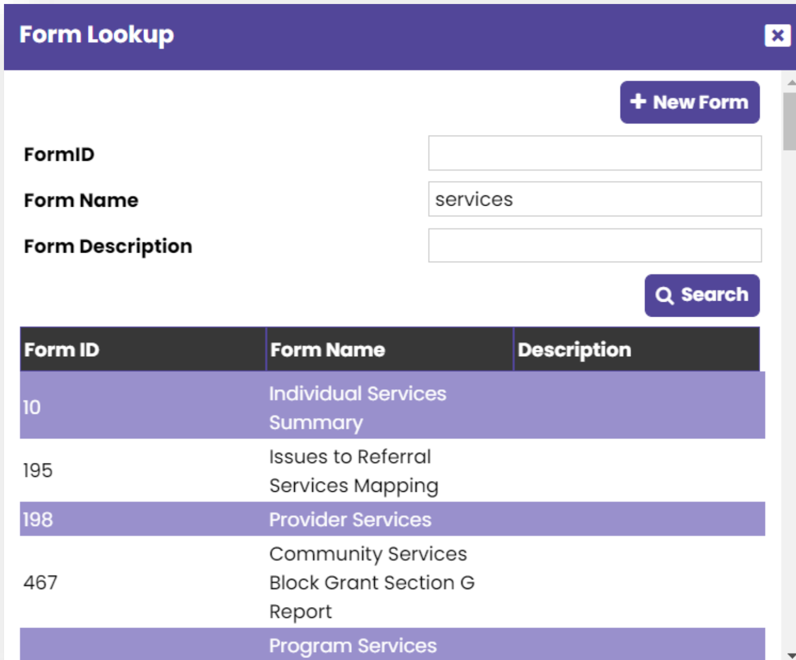
The **Icon** is the image that displays with the link on the dashboard. It defaults to a plus sign but can be changed by selecting from an array of image possibilities.

The **Label** is the text that appears next to the link. It displays 'New Menu Item' initially but can be changed to something more appropriate. We are going to add a link for the active Client's *Services Summary* form. Let us name this 'Services'.

The **Icon Color** and **Icon Background Color** (Icon BGColor) can also be changed here. These will default to a white icon and text with a CaseWorthy purple background.

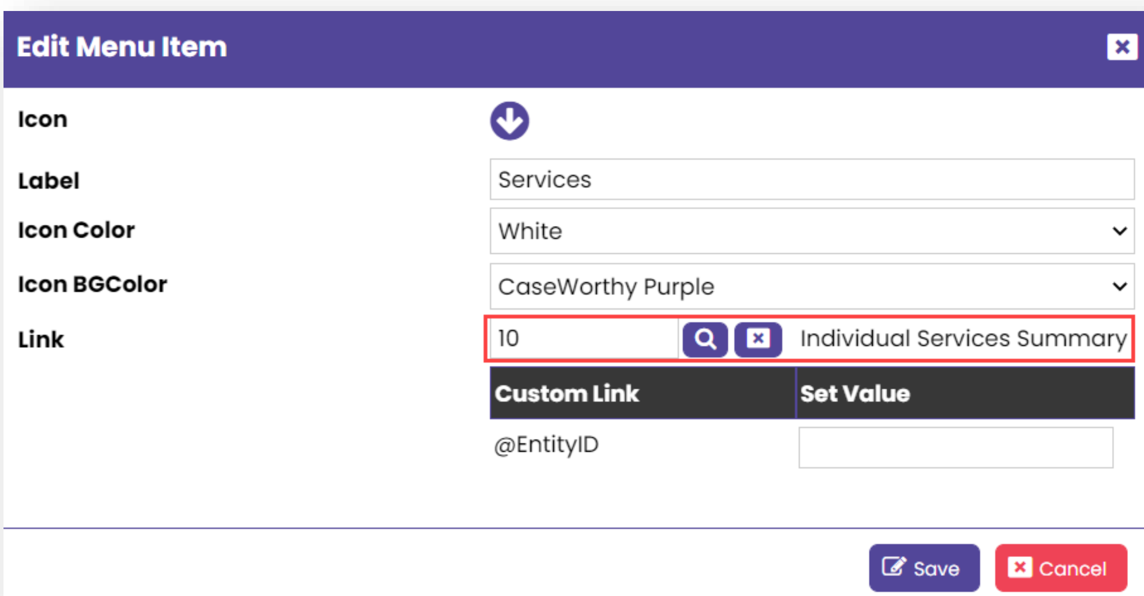
Most importantly is the **Link**. Where is the button going to direct the User? Click the lookup icon to search for an existing form, workflow, or dashboard.

Our link is going to direct the User to the active Client's *Services Summary* form. We will search for that form here (Form Lookup). We can search by the form ID, name, or description.



Let us search for the form and link it to the dashboard menu link.

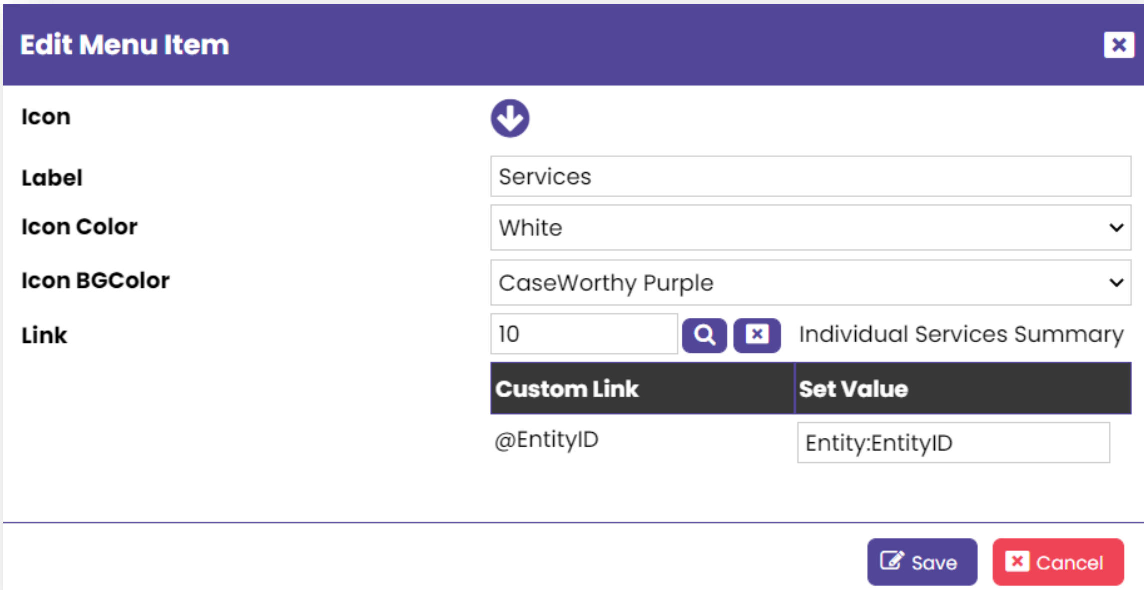
The form ID and name now display here with the necessary parameters below.



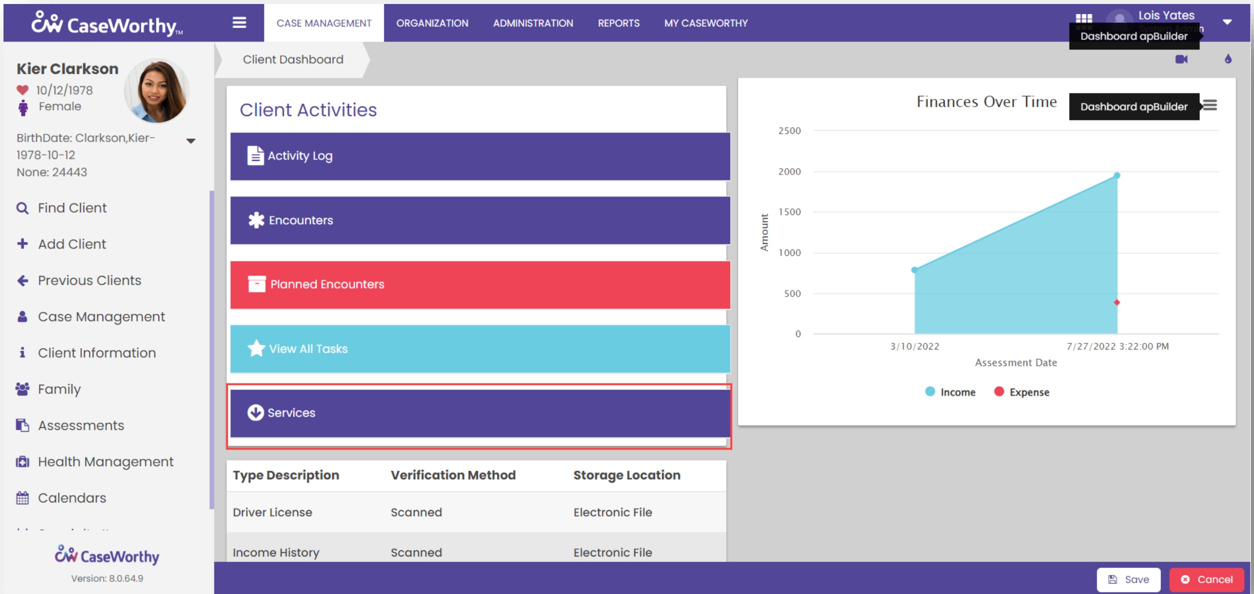
This form only requires a set value for EntityID.

In order to set the value, what question should we ask? What services do we want to display when this form is accessed from this menu link?

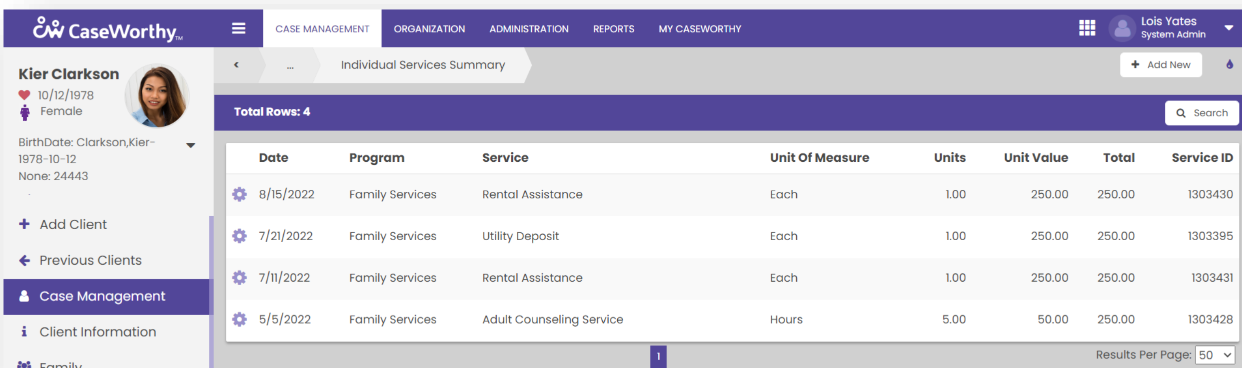
We want to access the active Client's services. Then, we should select 'Entity.EntityID' as the value.



Once saved and refreshed, you will see the **Services** link now displays within the Client Activities widget on the dashboard which appear as a single column of buttons.

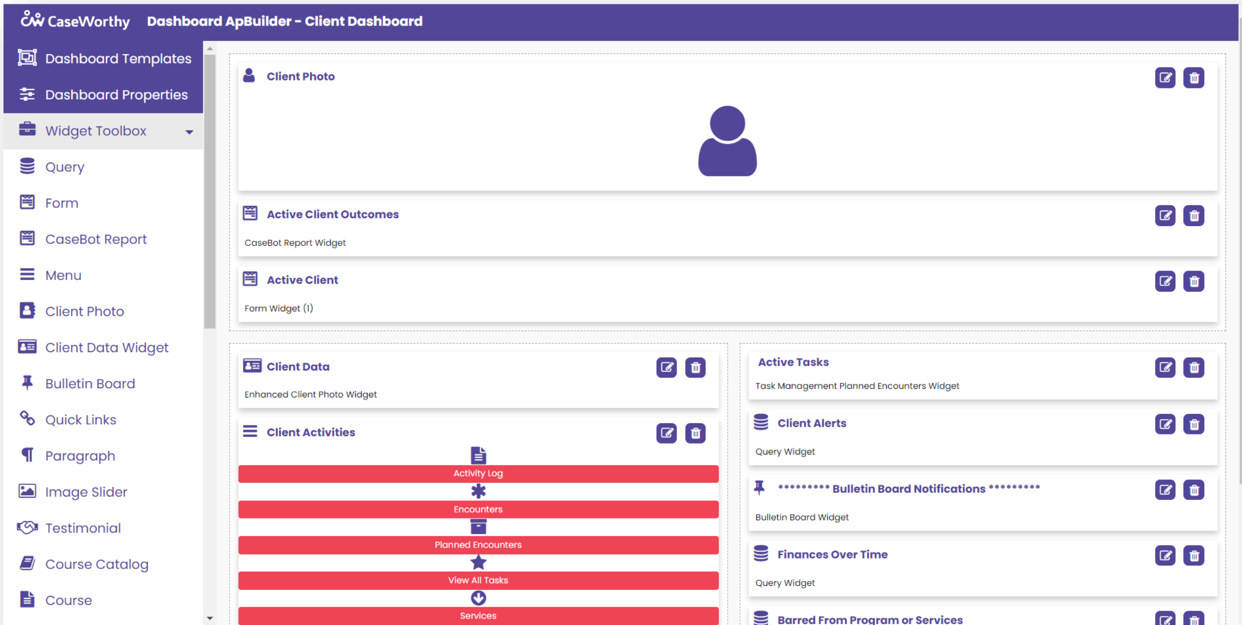


When clicked, the User is directed to form ID 10, which is the *Individual Services Summary* form for this Client.



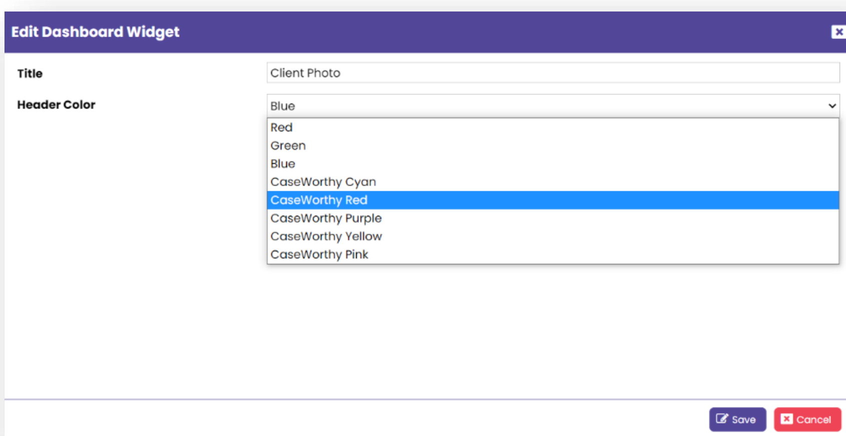
Client Photo

The next widget in the toolbox is Client Photo, which allows you to display the active Client's photo on the dashboard.



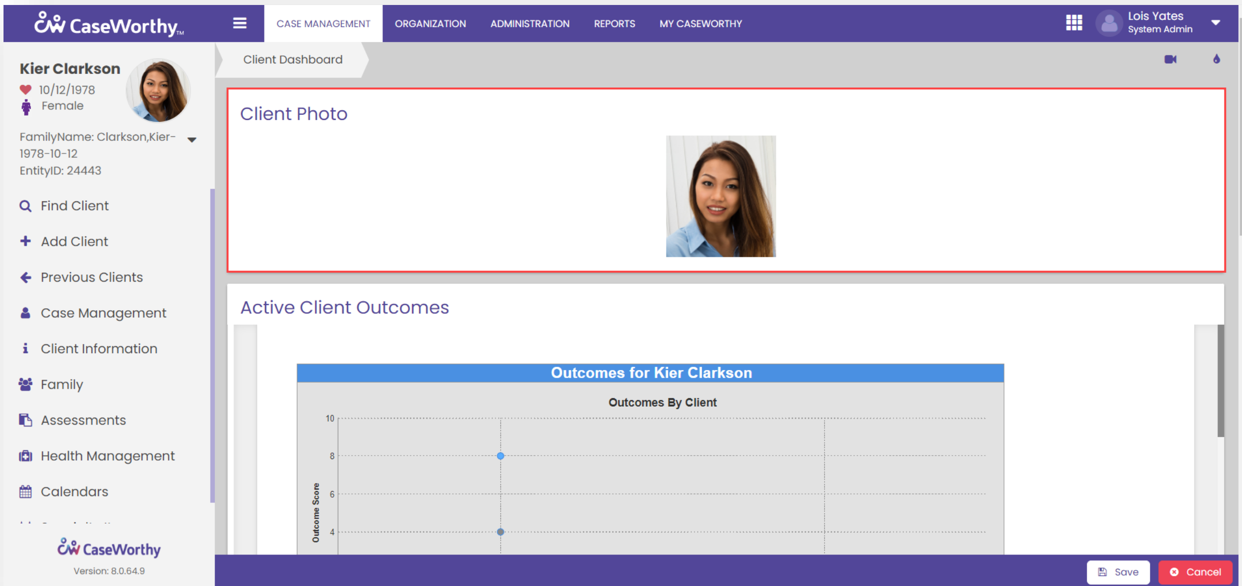
This is one of the few widgets that is hard-coded and is not highly customizable. This widget is already designed to read the Client.EntityID, which is the active Client.

There are two properties available for configuration though, the **Title** that displays and the **Header Color**

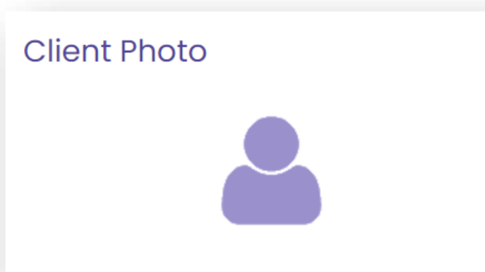


The photo that displays is the image that is uploaded within Client Documents and Checklists and must be set to the default photo in order to display within this widget.

This is how the dashboard might look with the Client Photo widget displayed.



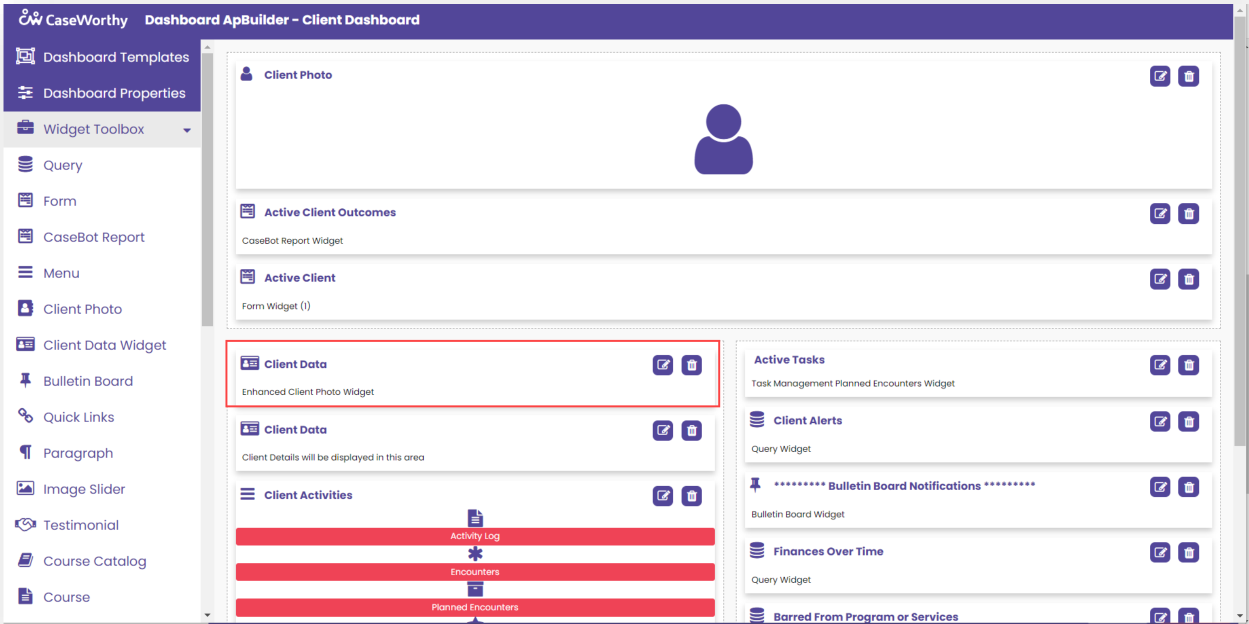
If a photo is not uploaded and set as the default, the widget will still display on the dashboard, but with no photo, as seen here.



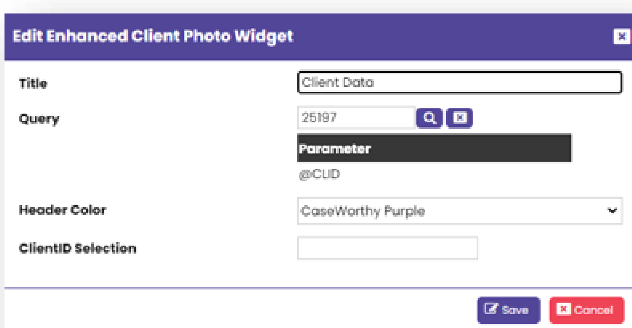
Client Data Widget

The Client Data widget is a more advanced version of the Client Photo widget and includes Client demographics details along with the photo.

Let us add the Client Data widget to our dashboard right above the existing widget on the dashboard titled 'Client Data'.

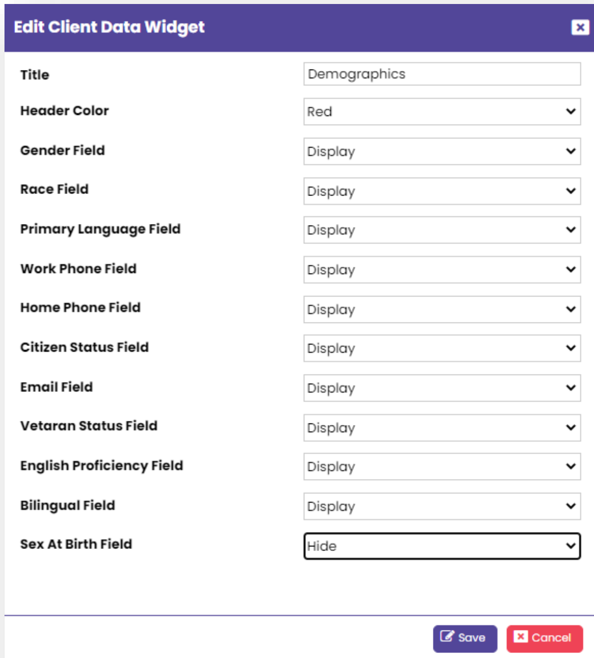


It is important to understand this duplication. The existing Client Data widget is in fact a type of query widget that is configured with a **Title** of ‘Client Data’ and was specially configured for the *Client Dashboard*.



This type of widget differs from the Client Data widget we are reviewing now. Once we configure our new widget, we will take a look at how the two differ for the User on the dashboard.

Let us open and configure the properties for our new widget.



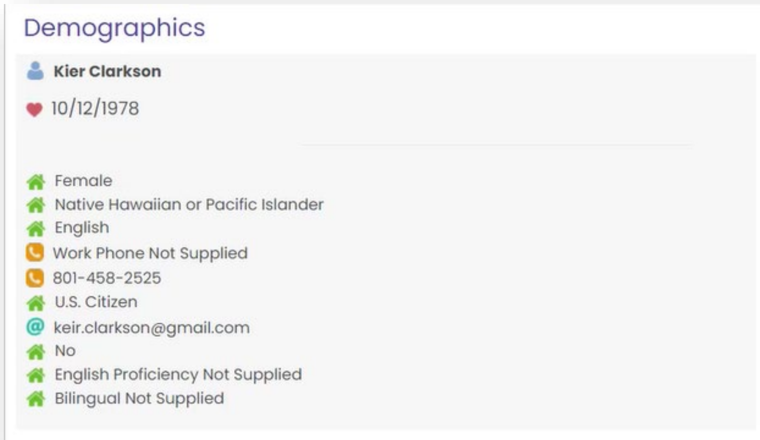
Notice the **Title** and **Header Color** can be customized here, just like with the other widgets we have reviewed.

Various demographic data for the active Client can be displayed or hidden on the dashboard, such as gender, race, primary language, contact information, etc. All fields are initially set to 'Display'.

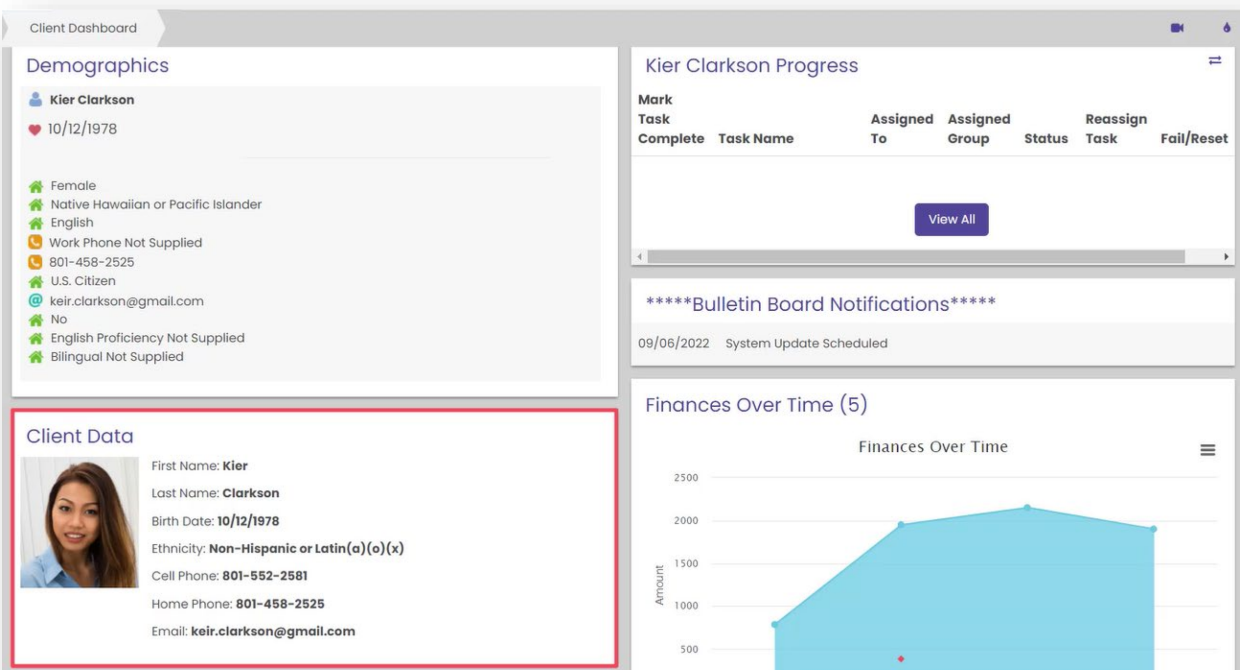
Remember, there was an existing widget titled 'Client Data'. Our new widget is titled 'Demographics'.

Let us review our new widget first. This is the Client Data widget we titled 'Demographics'.

The widget is designed to display the Client name and date of birth by default. Photos do not display, but there are several optional fields displaying demographic information that are configurable in terms of showing or hiding the information.



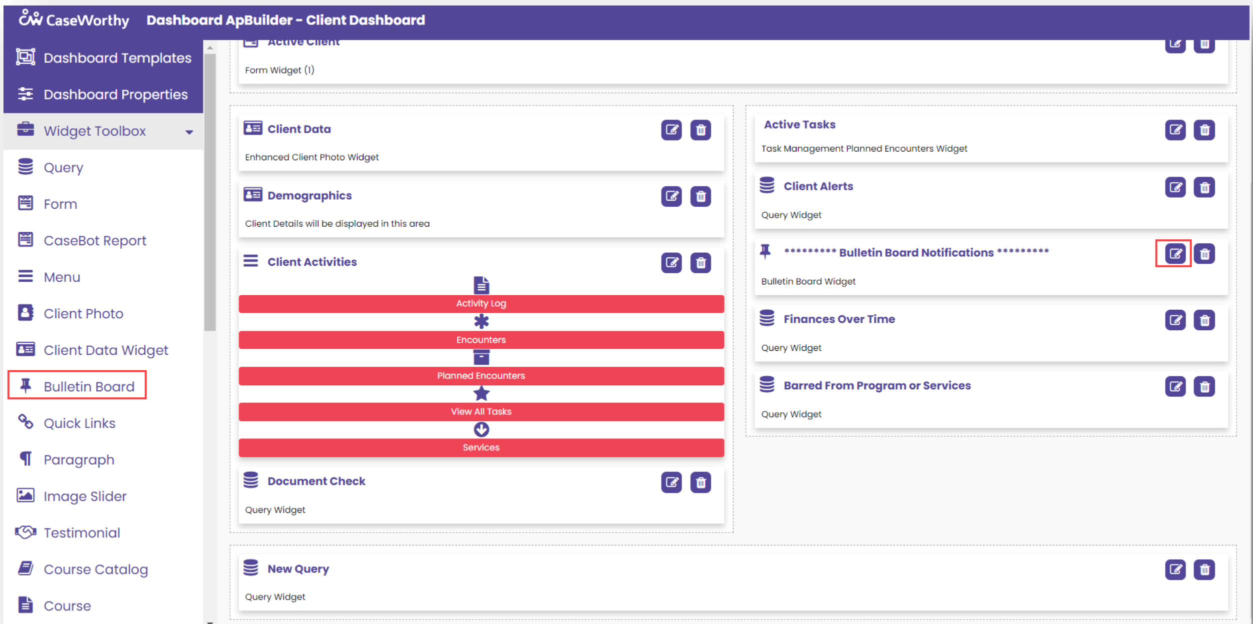
In contrast, the enhanced Client Photo widget titled 'Client Data' displays the Client's photo and uses a baseline query to display specific, but generally useful, demographic details.



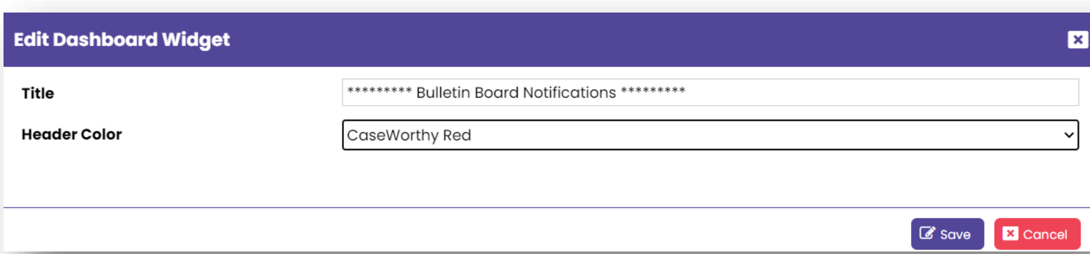
Bulletin Board

The Bulletin Board is used to show unread messages to Users based on the message's configuration.

This dashboard already has a bulletin board configured. Let us take a look at the properties.

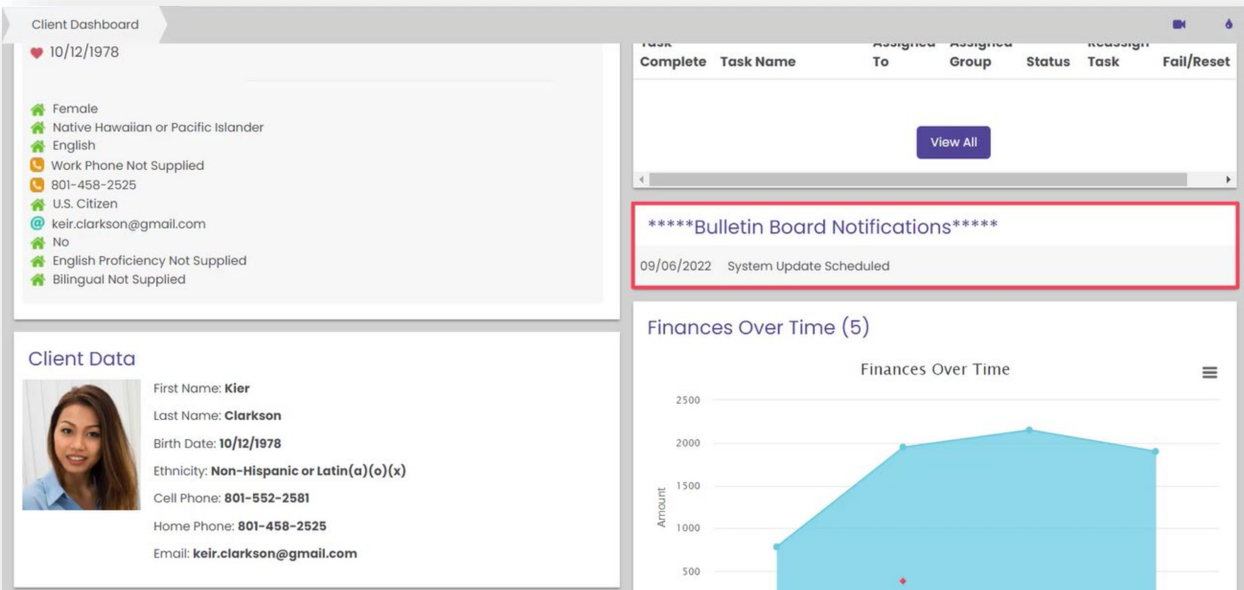


The **Title** that displays on the dashboard and the **Header** can be configured within the widget's properties.

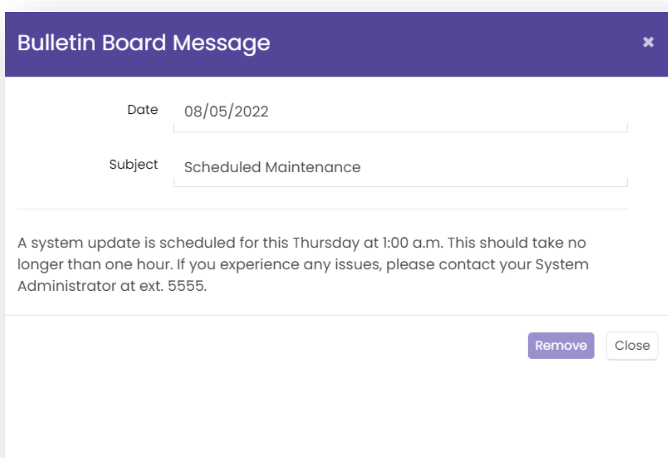


This is how a new message might display within the widget on the dashboard.

New bulletin messages are added from **Bulletin Boards** on the Administration tab. Remember, if there are no new messages, the widget will not display on the dashboard.



Click on the message to open the bulletin in a new window.



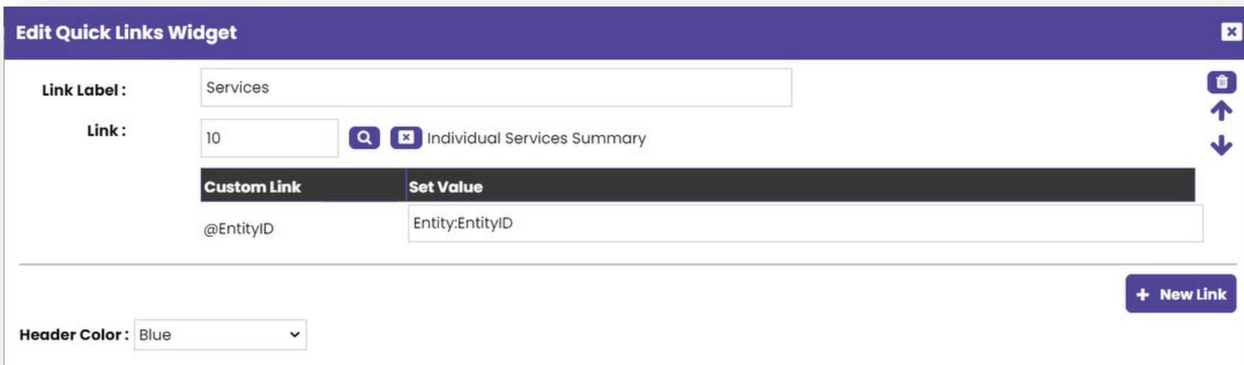
This allows the User to view the entire message, as well as REMOVE the message so that it will no longer appear in the widget on the dashboard

Quick Links

The Quick Links widget is very similar to the Menu widget. The only difference is there are no buttons or icons.

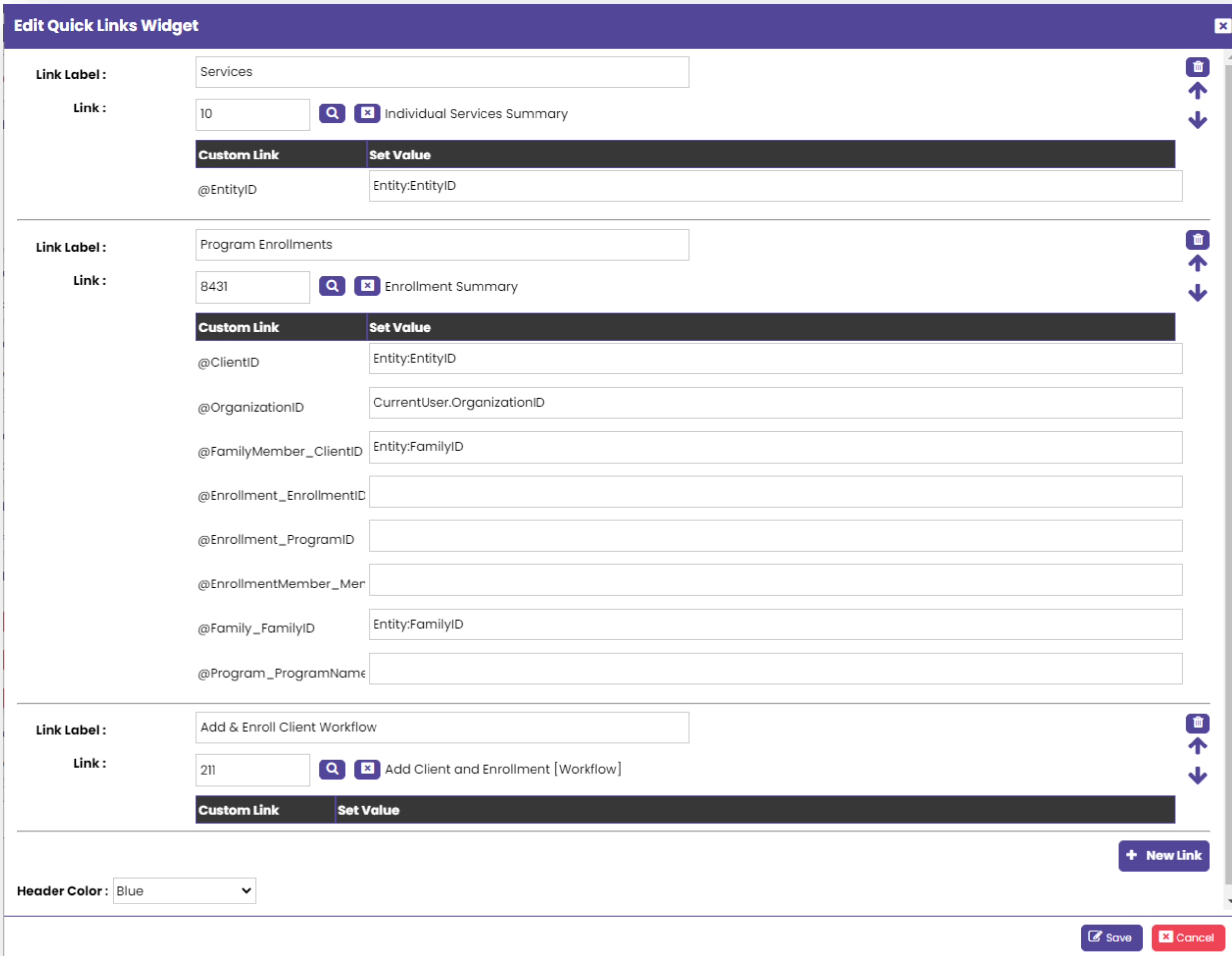
Let us add the widget and take a look at the properties.

Immediately, we are prompted to enter a **Label** for the first link. We will label this link 'Services' and link it to the *Individual Services Summary* form.



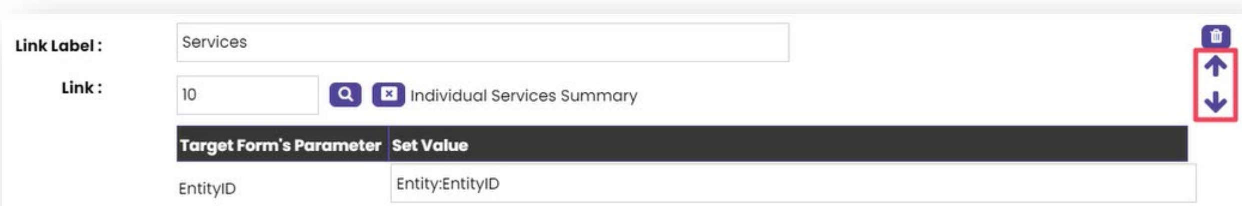
The primary parameter for the selected form is EntityID and is pulled over with an empty value. This will generate a blank form. If we set the value to 'Entity.EntityID', the form will then populate with the active Client's records.

Before we review the widget, let's add a couple more links.

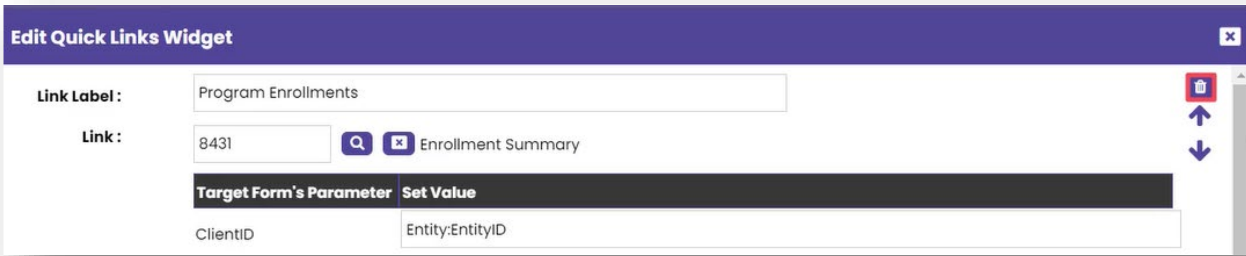


The **Header Color** can also be changed at the bottom.

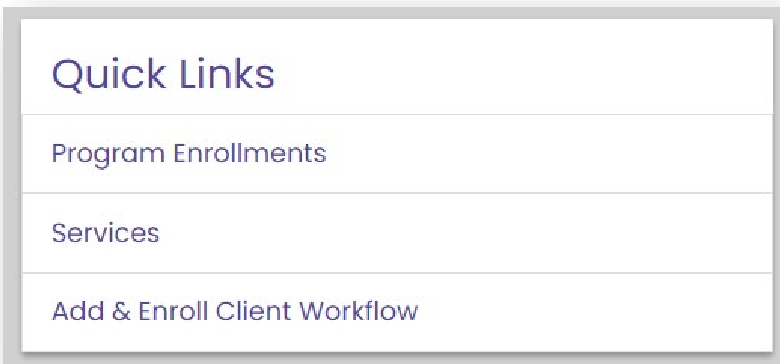
On the right, notice each of the links can be easily moved up and down in the list by clicking on the respective arrows. For example, we can move our 'Services' link down below our 'Program Enrollments' link.



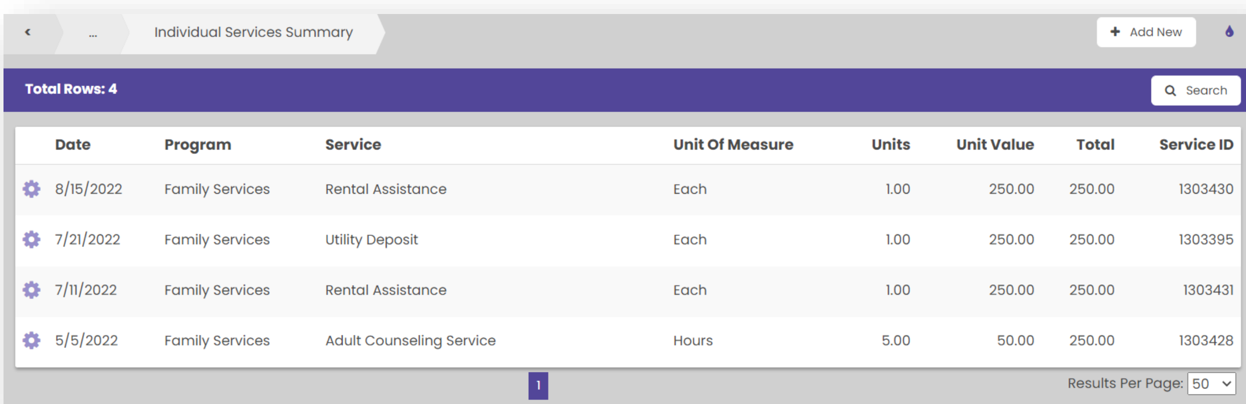
Each link can also be deleted here.



This is how our widget will display for the User.



Each of these links will now direct the User to its respective form or workflow. For example, Services opens the active Client's *Individual Services Summary* form.

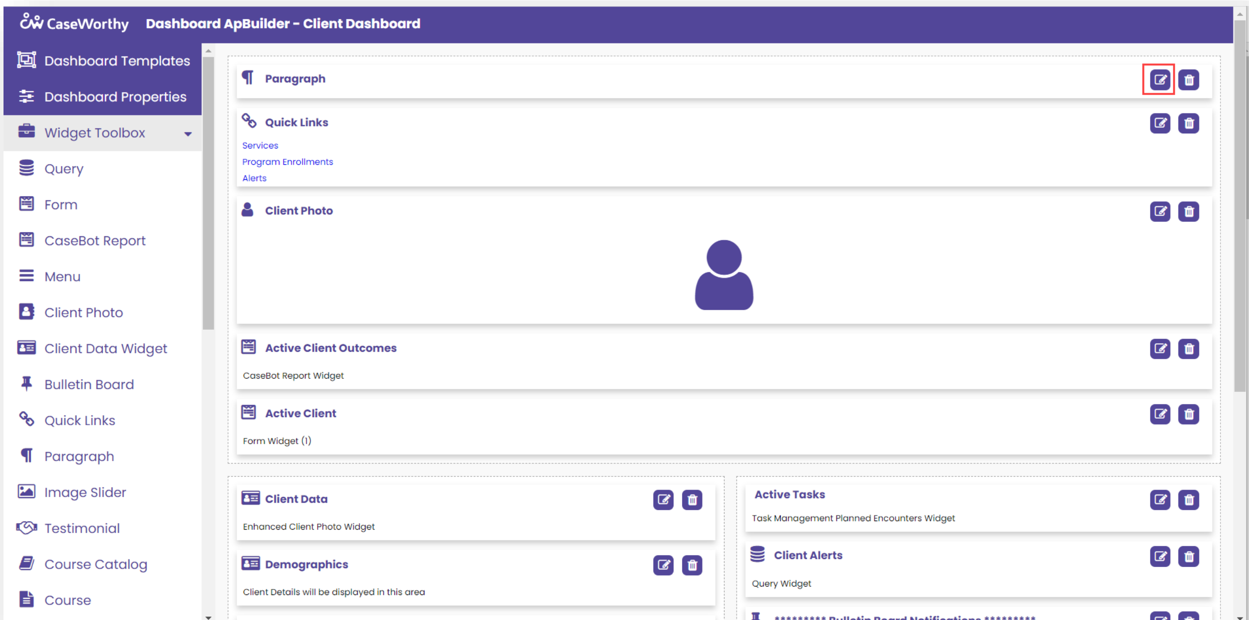


Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
8/15/2022	Family Services	Rental Assistance	Each	1.00	250.00	250.00	1303430
7/21/2022	Family Services	Utility Deposit	Each	1.00	250.00	250.00	1303395
7/11/2022	Family Services	Rental Assistance	Each	1.00	250.00	250.00	1303431
5/5/2022	Family Services	Adult Counseling Service	Hours	5.00	50.00	250.00	1303428

Paragraph

The next item in the toolbox is the Paragraph widget. This widget is versatile in that it gives you the ability to incorporate features from other widgets we have already reviewed, rolled all into one section, including static text, images, videos, buttons, and more.

Let us add a new Paragraph widget to our dashboard and review its properties.



This widget allows you to add custom static text, upload files, images, and videos, as well as customize buttons that are linked to other forms, workflows, or dashboards.

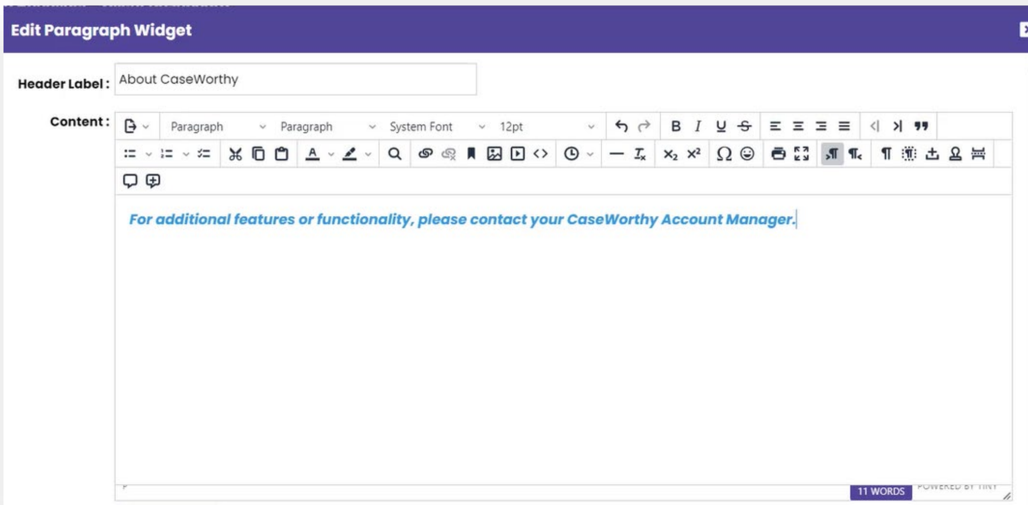
This is an opportunity to incorporate the features of many distinct widgets into one space on the dashboard if this method would suit the needs of your Organization better. Perhaps multiple widgets on the dashboard could be eliminated by adding just this one widget.

Let us customize this widget. Just as an example, I am going to add information about CaseWorthy at the top, and then add buttons directing the

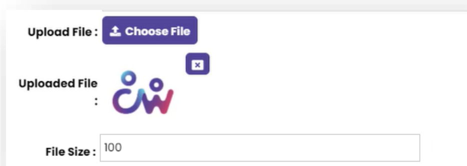
User to other forms or workflows that can replace other widgets we have already added on our dashboard.

First, a **Header Label** gives us the opportunity to add a title at the top of the widget.

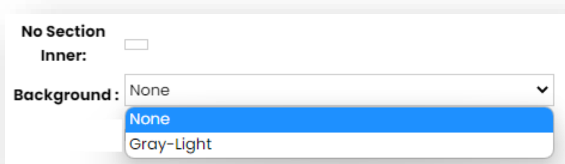
Here (**Content**), you can add and format static text to display for the User.



You can also upload an image or file (using **Upload File**).

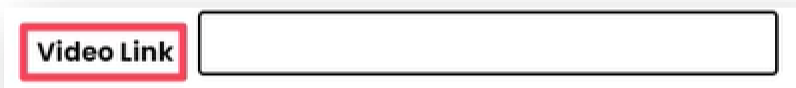


Additional configurations allow you to add sections within the widget **No Section Inner** as well as change the **Background** color**.**

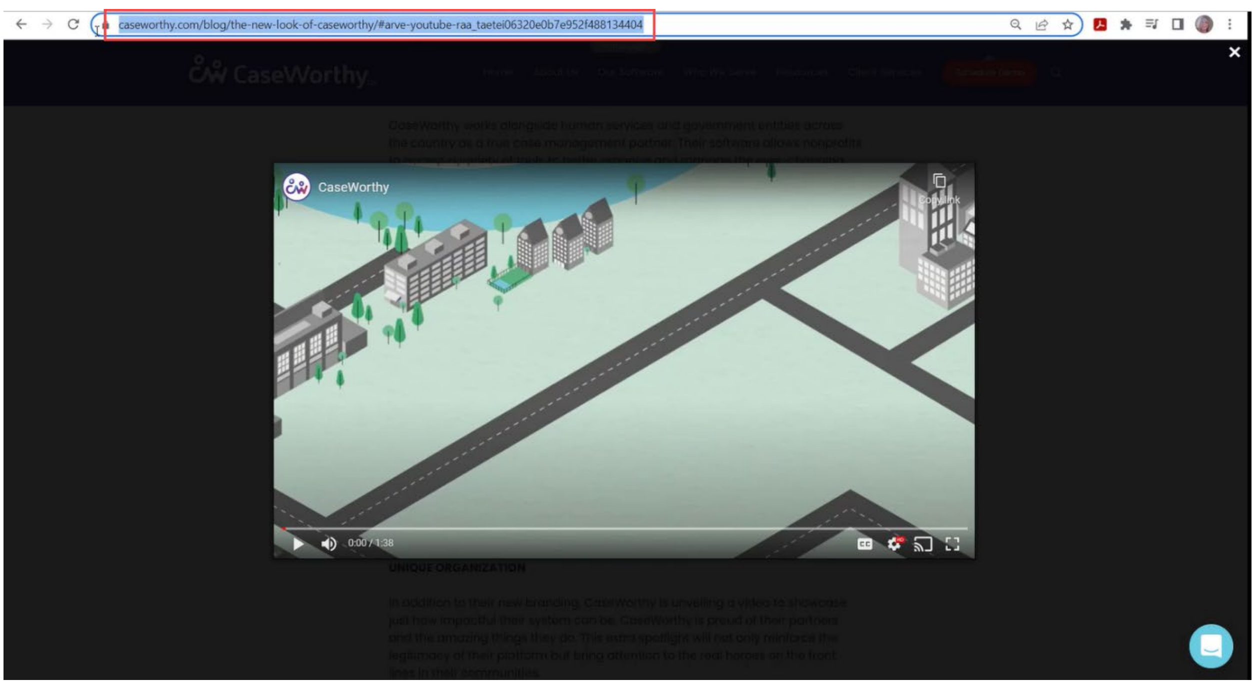


A **Video** can be displayed within this widget. But it is a little different than other places within the application where we have added videos. In other places, we are adding a link for the User to access a YouTube video, and we therefore only entered the last portion of the YouTube link in the field.

Here, we are embedding a video within the widget, so you must enter a complete link, or the entire https Website address.

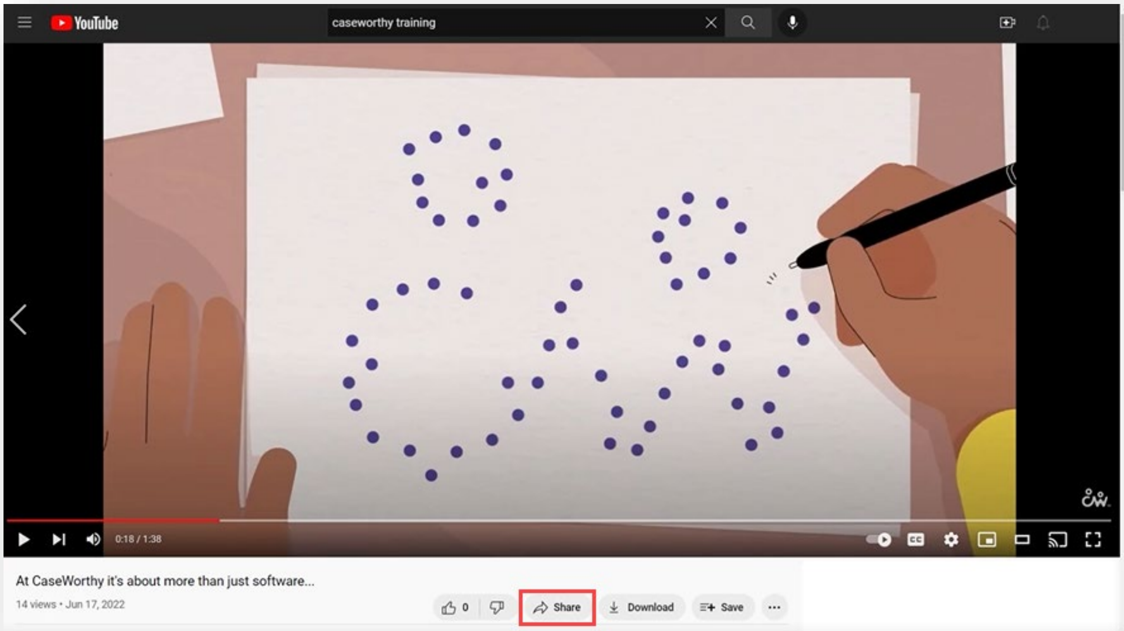


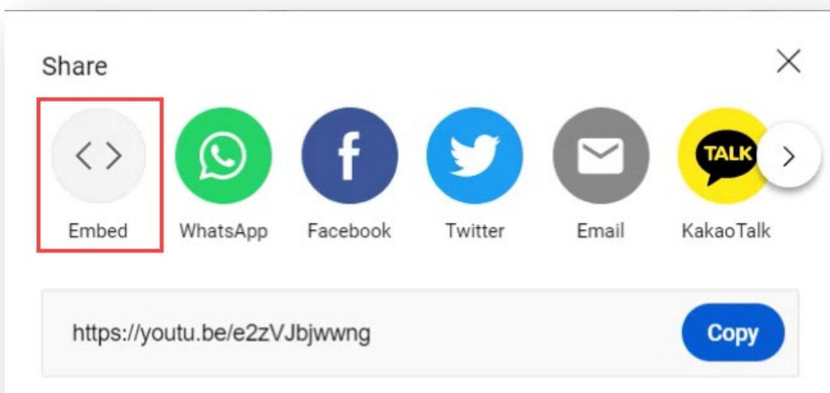
If you are adding a video from the Web, copy and paste the entire Website address, including the 'https//:' into this field.



We can still add a YouTube video here, but because we are embedding the video, we must first obtain the embeddable link.

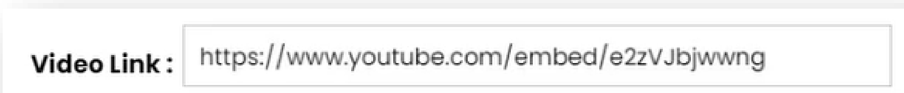
Navigate to the YouTube video you would like to embed. Select **Share** and then select **Embed**.



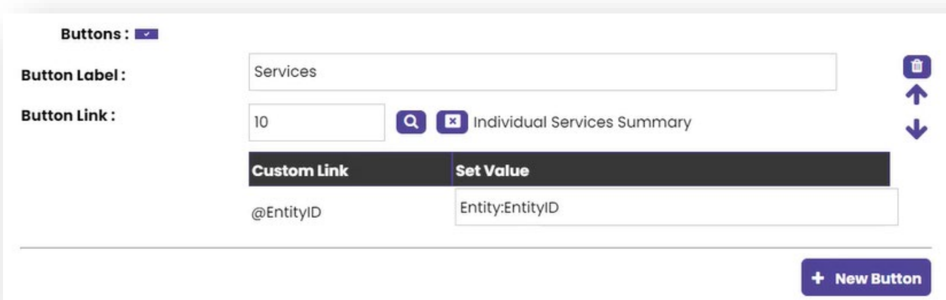


From the *Embed Video* window, select and then copy the embeddable link only, including 'https://'.

Paste the link into the video field.



Lastly, we can add buttons to display along the bottom of the widget. Each button should be labeled, the link to a form, dashboard, or workflow must be set, and the parameters must be configured.



Click NEW BUTTON to add another.

Let us add buttons for Program Enrollments, the *Add & Enroll Client* workflow, *Client Alerts*, *Encounters*, and *Client Activities*.

Now that our paragraph widget is saved, we can remove a couple of widgets that are no longer needed.

Since we added buttons for Services and Program Enrollments forms, and we added a button for the *Add & Enroll Client* workflow, we can remove the Quick Links widget.

Remember, to delete a widget from a dashboard, click the trashcan icon located in the top right corner of the widget.

We also added buttons for *Client Activities* and *Encounters*. Because of this, I no longer wish to display the Client Activities widget. I will remove this widget as well.

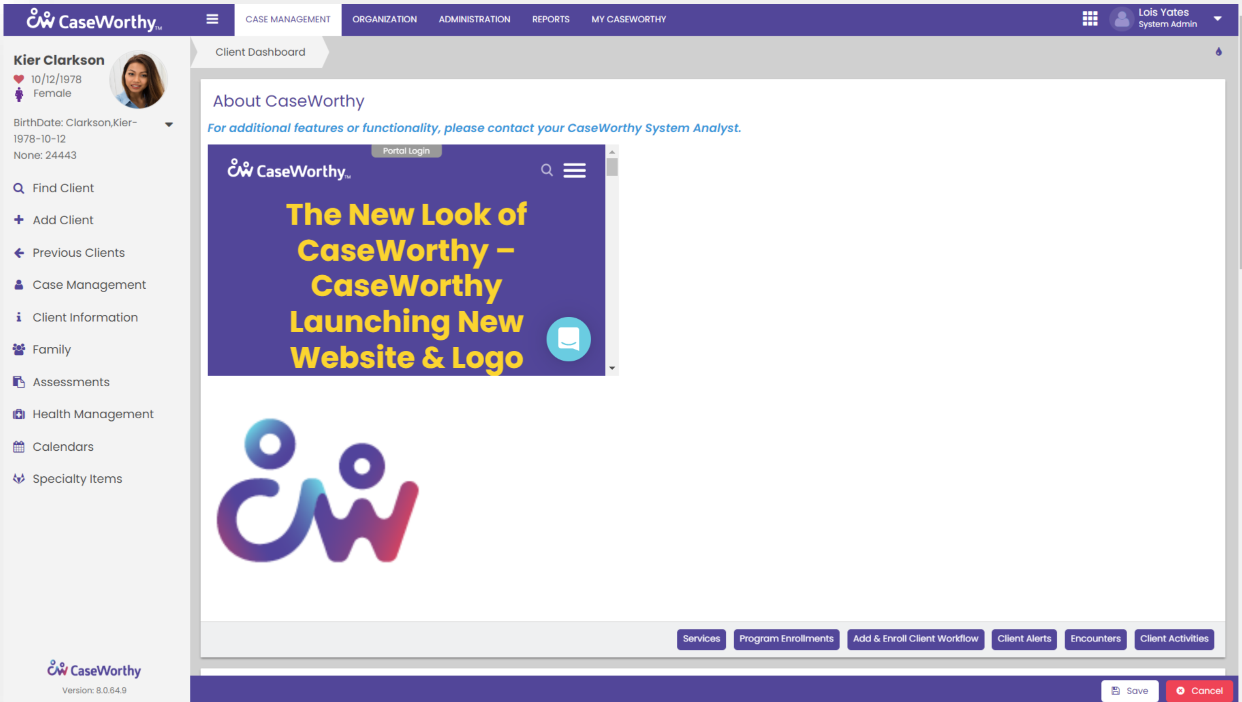
Let us take a look at our dashboard now. And remember, this is just an example that can be configured to meet your Organization's needs.

All text, videos, and images are left aligned.

Our **Header Label** 'About CaseWorthy' displays along the top.

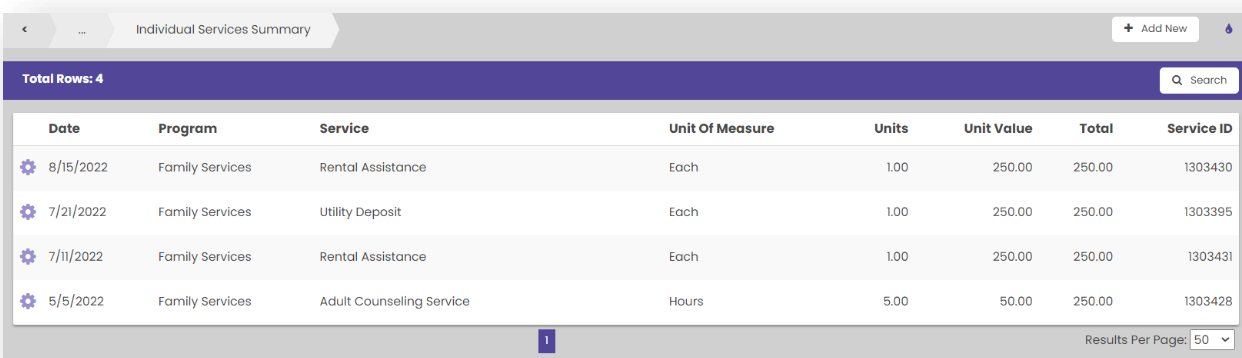
The formatted static text (**Content**) displays right below.

The embedded video (**Video Link**) displays without the User ever having to leave the current window, and our uploaded logo (**Uploaded File**) appears as well.



The **Buttons** we added display along the bottom and are right aligned. When clicked, the User will be redirected to the linked form, dashboard, or workflow.

Just like in our previous example, click Services, and the *Individual Services Summary* form displays.



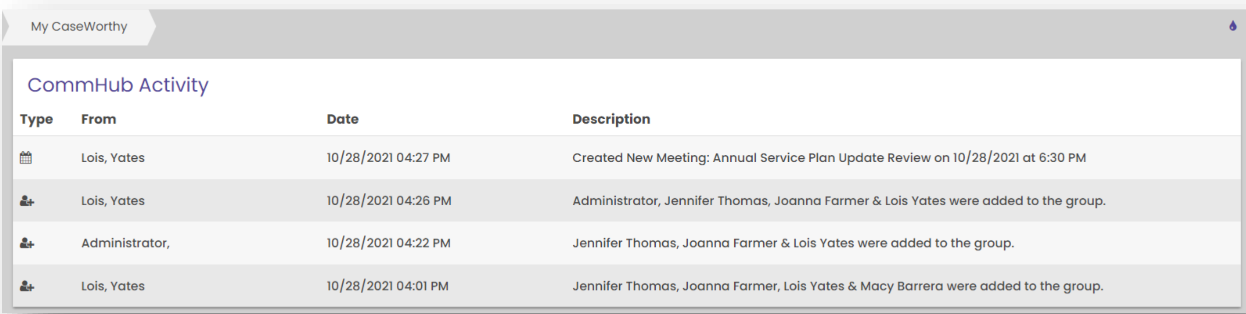
Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
8/15/2022	Family Services	Rental Assistance	Each	1.00	250.00	250.00	1303430
7/21/2022	Family Services	Utility Deposit	Each	1.00	250.00	250.00	1303395
7/11/2022	Family Services	Rental Assistance	Each	1.00	250.00	250.00	1303431
5/5/2022	Family Services	Adult Counseling Service	Hours	5.00	50.00	250.00	1303428

CommHub Activity

The final widget we will review in this video is located further down in the toolbox, which is the CommHub Activity widget.

If your Organization is utilizing CaseWorthy's Communication Hub functionality, this can be a useful widget for the User. It is already configured and ready-to-use once placed on the dashboard.

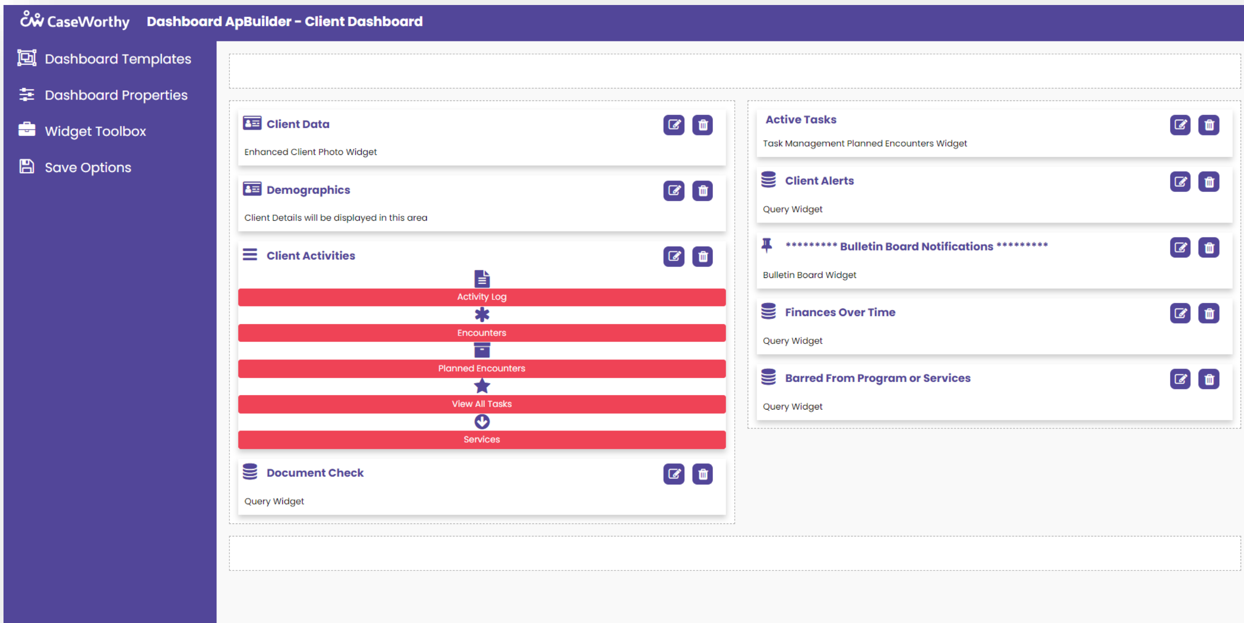
As an example, this widget can be placed on the *Client* or *My CaseWorthy* dashboard. It includes a list of the User's most recent communication, including the type, who it was from, the date of the communication, and a description. The User can click the widget to quickly open CommHub in a separate window.



This concludes the *Widget Toolbox* video. In the final two videos of this series, we will explore the highly utilized widget in the toolbox, the Query widget.

Query Widget

This 4th video of the CaseWorthy *Dashboard apBuilder* video series explores the first widget in the toolbox, the Query widget.

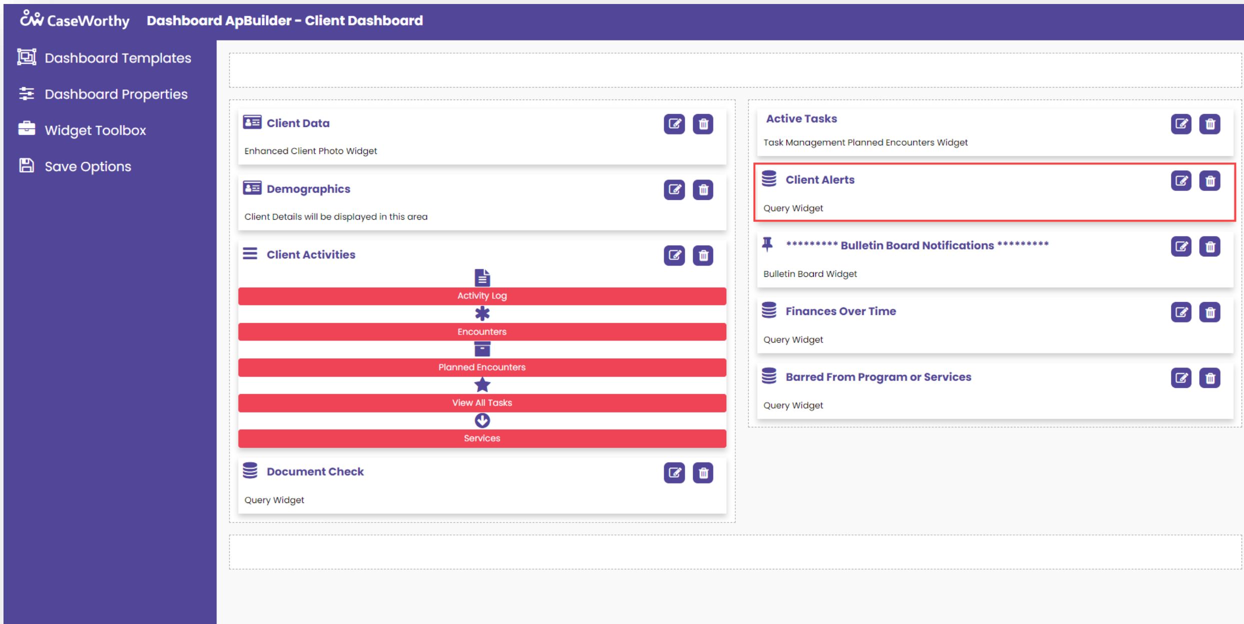


As discussed previously, the Widget Toolbox includes a wealth of options for customizing your dashboard.

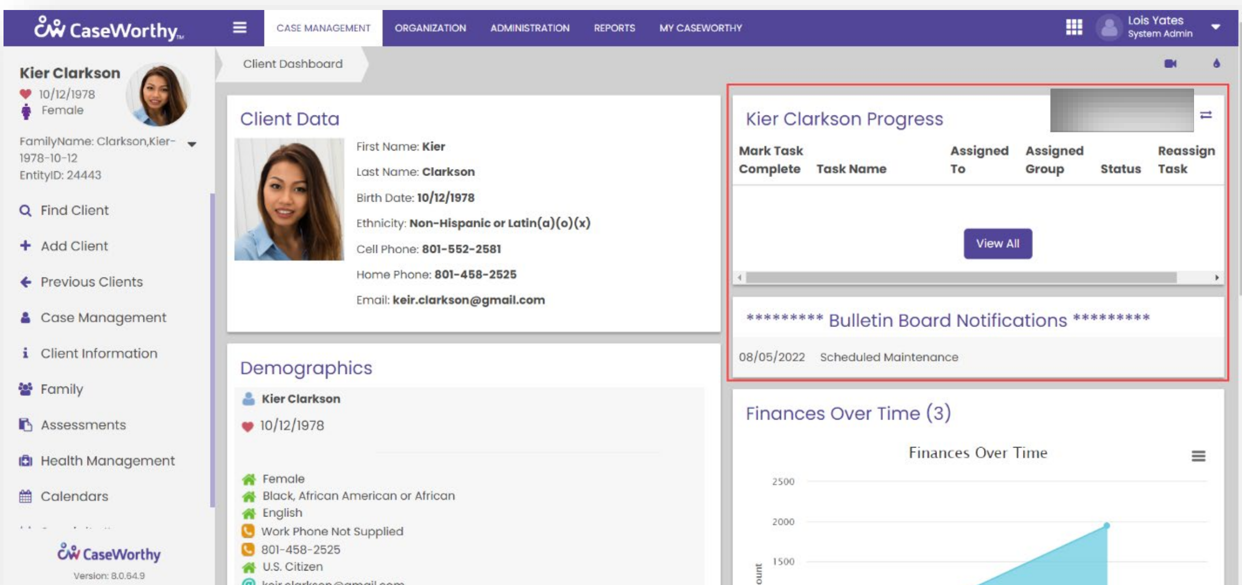
In the previous video, we reviewed some of the most common tools available. In this video we will begin to explore the first and most powerful and dynamic widget, the Query widget. The last video in the series further discusses the different charts that are available for displaying the queried data.

Query widgets display live data when the dashboard initially renders. They are designed to present information about Clients, Users, Organizations, etc., and will only appear on the dashboard if there is data to display rather than showing an empty table or chart.

Let us look at an example. Our dashboard is already configured with a query widget titled Client Alerts.



When we navigate to the dashboard in the application, notice this section does not display.

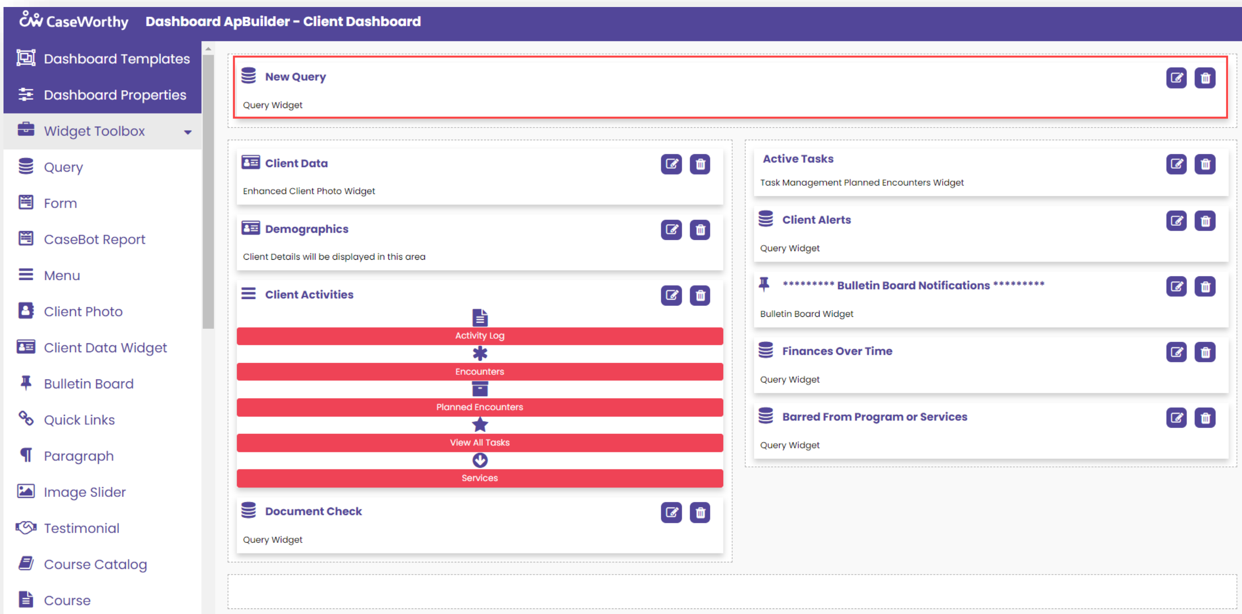


This is because there are currently no alerts recorded for the Client. Query widgets are designed to be hidden from view, as opposed to displaying with no data.

Add a Query Widget

Our *Client Dashboard* here includes various query widgets already: Document Check, Client Alerts and Finances Over Time. These are available on the baseline *Client Dashboard* to provide quick access to various important pieces of information for the User.

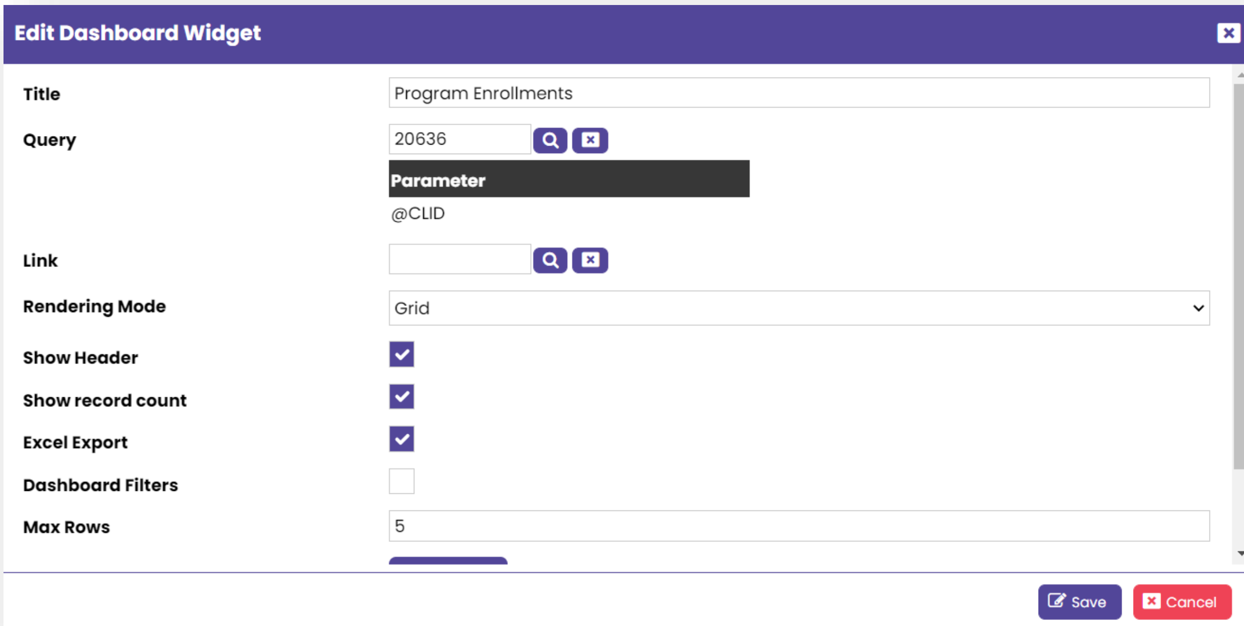
Let us add a new query to our dashboard that displays the Client's program enrollment information.



We will configure our query widget to display each program for which the Client is enrolled, and we will then highlight those with pending assessments in green.

Configure a Query Widget

How the widget displays on the dashboard can be configured by editing the query's properties.

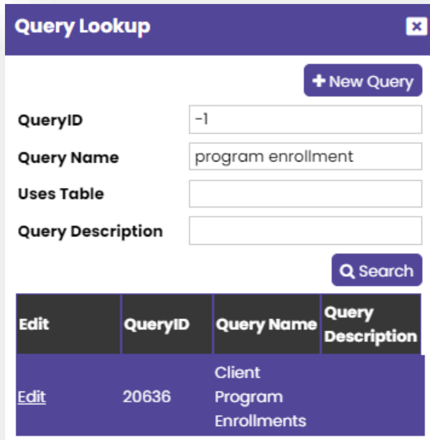


Title

First, enter the **Title** which will represent the information that is displayed.

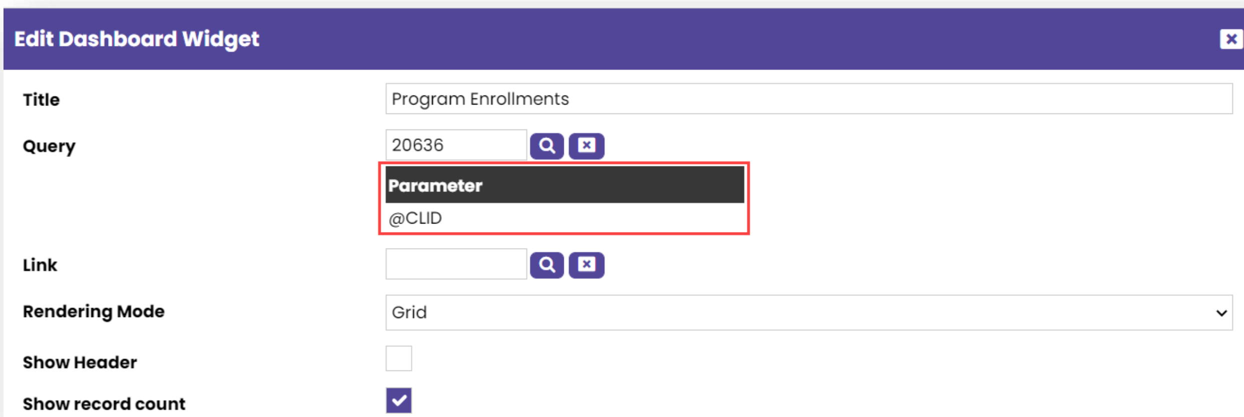
Query

The next property allows us to select the **Query** which will return the data we want to display on the dashboard. Click the lookup icon to search for an existing query.



An existing query can be searched for by ID, name, table, or description.

Upon selecting the query, the necessary parameters for the query display.

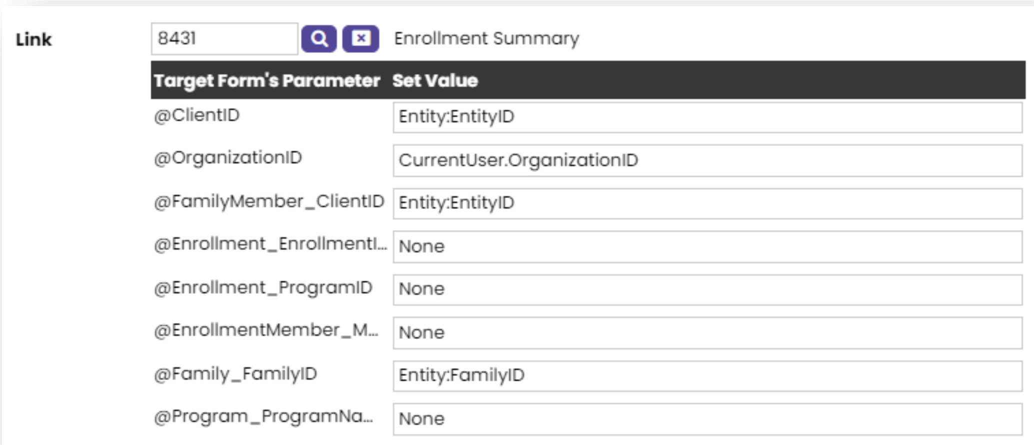


Parameters listed here are very important in that they determine what information displays on the dashboard when the query renders. Once the properties for the query widget are saved, it is important to access Dashboard Properties to confirm all parameter set values are configured correctly.

Link

The next property here is **Link**, which allows for the Query widget to also act as a link so that when clicked, the User is directed to a form, workflow, or dashboard where the data appearing in the widget is typically entered. In this example, we will include a link to the *Enrollment Summary* form.

The target form's primary parameters display below. For this scenario, we must select 'Entity.EntityID' as the first value in order for the form to populate correctly.



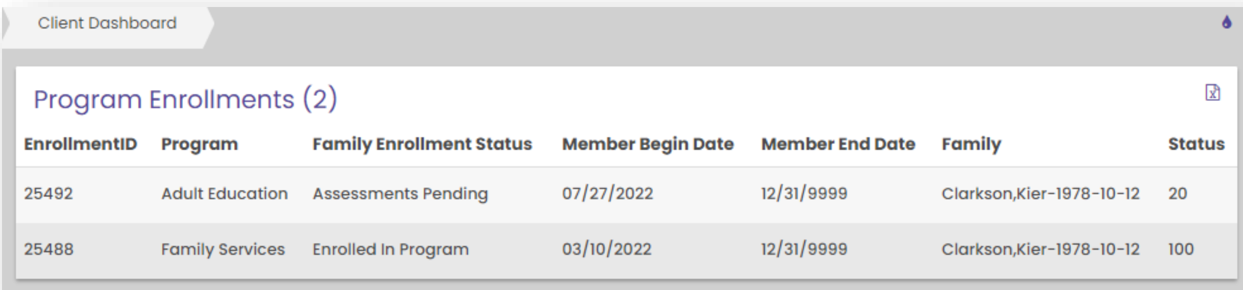
Rendering Mode

The **Rendering Mode** allows you to select the format in which the query displays, such as a grid, chart, table, etc. We will first review how a grid will display, then we will review a table. In the next video of this series, we will explore how the query appears as a chart.

Header

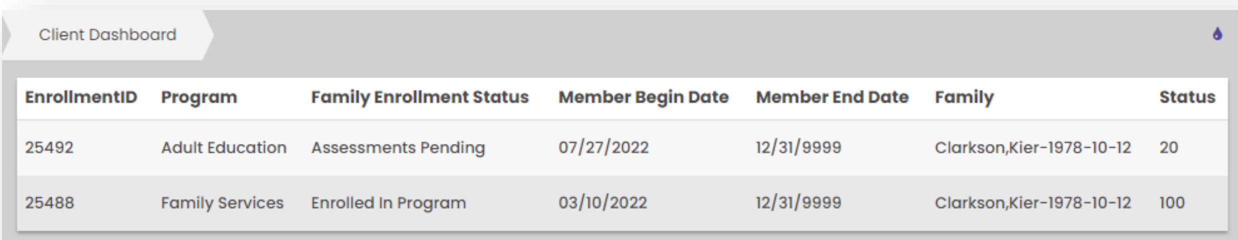
The **Header** is the row that displays at the top of the query and can display the title and **Record Count**.

You must select the **Show Header** option in order to display the header row, which includes the title, record count, and Excel export option.



EnrollmentID	Program	Family Enrollment Status	Member Begin Date	Member End Date	Family	Status
25492	Adult Education	Assessments Pending	07/27/2022	12/31/9999	Clarkson,Kier-1978-10-12	20
25488	Family Services	Enrolled In Program	03/10/2022	12/31/9999	Clarkson,Kier-1978-10-12	100

If a title isn't necessary to explain the data in the query, not including a header can save space on the dashboard. But remember, removing the header also means record count and the Excel export options cannot display



EnrollmentID	Program	Family Enrollment Status	Member Begin Date	Member End Date	Family	Status
25492	Adult Education	Assessments Pending	07/27/2022	12/31/9999	Clarkson,Kier-1978-10-12	20
25488	Family Services	Enrolled In Program	03/10/2022	12/31/9999	Clarkson,Kier-1978-10-12	100

If you are going to display the header row, and you would like to include the record count, select **Show record count.**

Export to Excel

You can also add the ability to export the data from the query to Excel. Select this option to display the **Export to Excel** option for the User.

It is important to note the Excel Export functionality will vary depending on how the query is rendered. This is most useful when the rendering mode is 'Grid' or 'Table'. Again, the header row must also be displayed in order to view the Export to Excel option. If the header row is hidden, the option will not display.

The **Dashboard Filters** property does not apply at this time.

Max Rows

Max Rows allows you to enter the maximum number of rows of data that will display on the dashboard. You need to consider how much space this widget should populate on the dashboard. Including a link for the widget allows the User to easily access the full list of records. For example, if we enter '5' here, only the five most recent program enrollment records will display.

Query Rule and Color

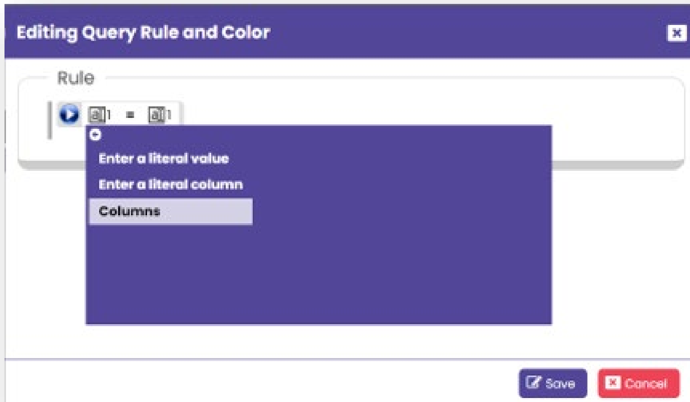
Query Rule and Color only applies to queries rendered in grid mode. This allows you to customize rules and colors for the records displayed.

TIP: You must save your progress in dashboard apBuilder first before gaining access to set the rule.

Here, you can define a set of circumstances for each record in the grid and then define the rule based on the specifications to highlight the row in a certain color.

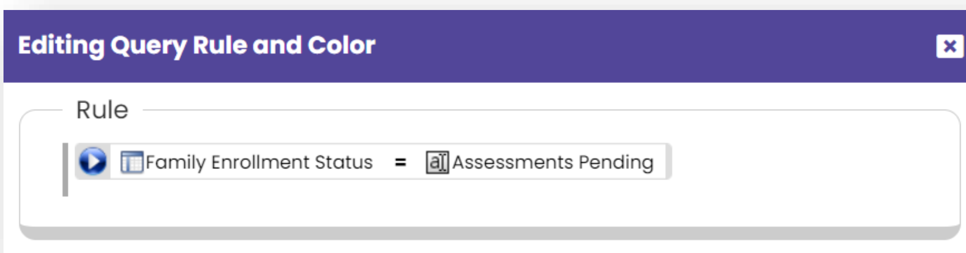
For this example, we are displaying all program enrollment records for the Client. Let us set a rule that will highlight all program enrollments that still having pending assessments in green.

Select the first variable and display the columns available from the table.



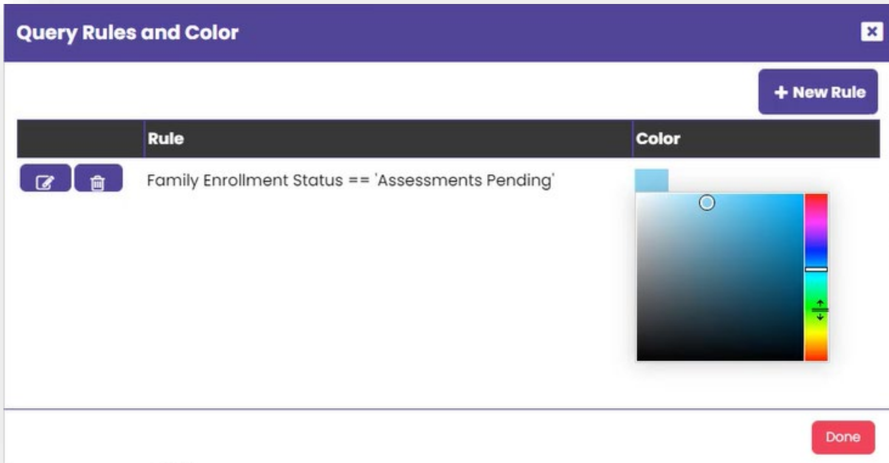
We are adding the rule that when the 'Family Enrollment Status' column is equal to 'Assessments Pending'.

Therefore, we will select the 'Family Enrollment Status' column and leave the equal symbol. On the right side of the equation, we will select **Enter a Literal Value** and then enter 'Assessments Pending'



However, it is important to remember the literal value entered is case-sensitive. If 'Assessments Pending' is not entered exactly as the enrollment status value, the rule will not work.

Once the rule is saved, select the color to highlight these records.



The final property is to select which color the header row should display (**Header Color**).

Click SAVE.

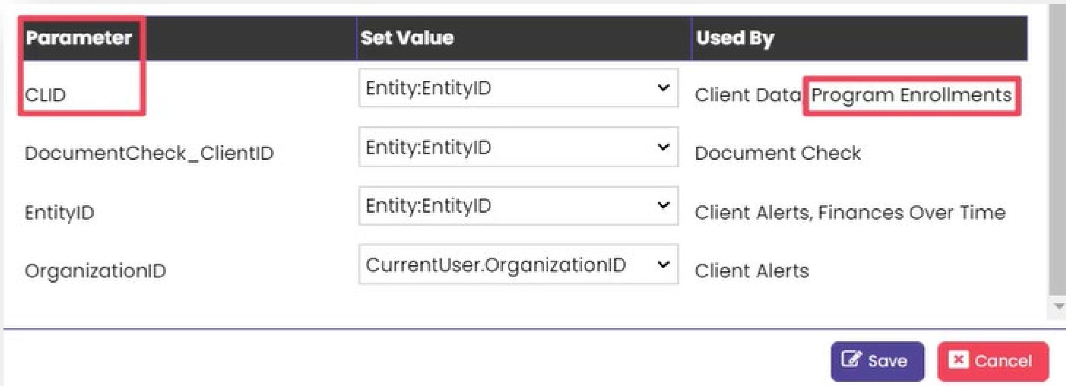
Notice the Program Enrollments query is displayed at the top of the dashboard. But, there is still one final step before we save and exit the Dashboard apBuilder.

Query's Parameters

Since this is a new query, let us ensure our parameter set values are correct within Dashboard Properties.

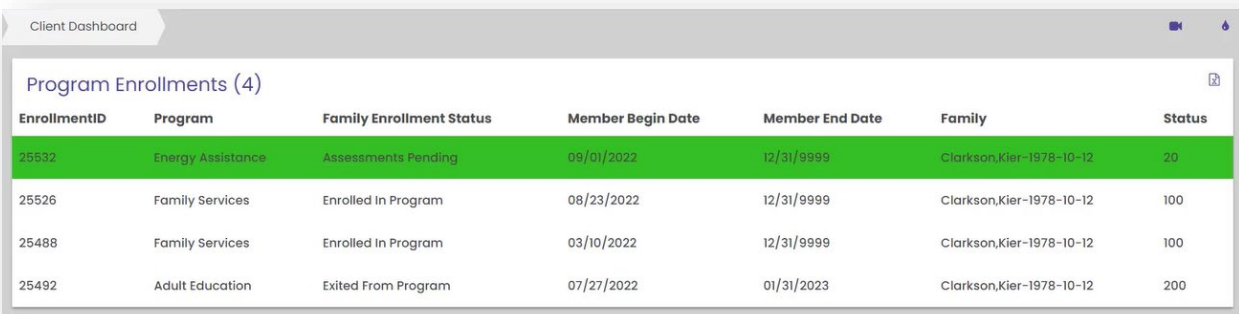
Although we did access the properties previously, we have added a new query, and there could be new parameters pulled over that need to be set.

Notice the new parameter required by the Program Enrollments query, is CLID which is also used by Client Data.



Parameter	Set Value	Used By
CLID	Entity:EntityID	Client Data Program Enrollments
DocumentCheck_ClientID	Entity:EntityID	Document Check
EntityID	Entity:EntityID	Client Alerts, Finances Over Time
OrganizationID	CurrentUser.OrganizationID	Client Alerts

Back on the *Client Dashboard*, we can now see the new Program Enrollments query displayed at the top with the enrollments and those with the 'Assessments Pending' status are highlighted in green.



EnrollmentID	Program	Family Enrollment Status	Member Begin Date	Member End Date	Family	Status
25532	Energy Assistance	Assessments Pending	09/01/2022	12/31/9999	Clarkson,Kier-1978-10-12	20
25526	Family Services	Enrolled In Program	08/23/2022	12/31/9999	Clarkson,Kier-1978-10-12	100
25488	Family Services	Enrolled In Program	03/10/2022	12/31/9999	Clarkson,Kier-1978-10-12	100
25492	Adult Education	Exited From Program	07/27/2022	01/31/2023	Clarkson,Kier-1978-10-12	200

Let us review a couple of the properties we set.

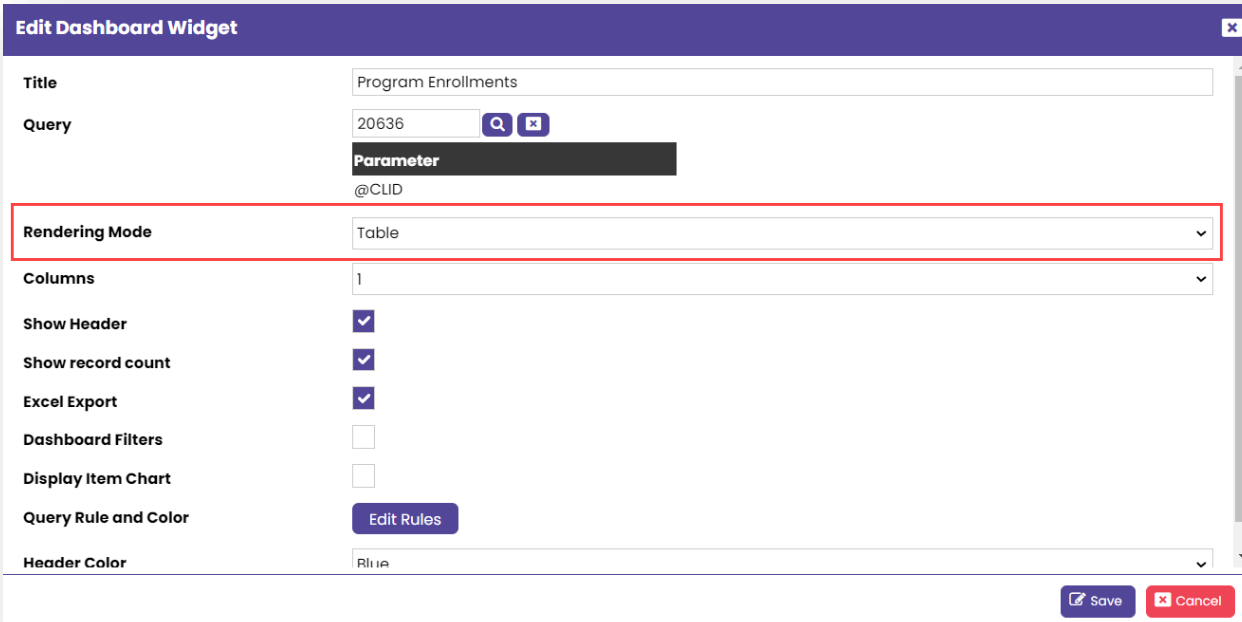
Notice the header at the top and how it includes the query title, record count, and the Excel to Export option.

Also, notice the record highlighted in green because the enrollment status is 'Assessments Pending'.

Rendered as a Table

Now, let us look at how the query differs when rendered as a table.

In the previous example, we rendered the query as a grid. From the properties, we will now select 'Table' as the **Rendering Mode** instead.

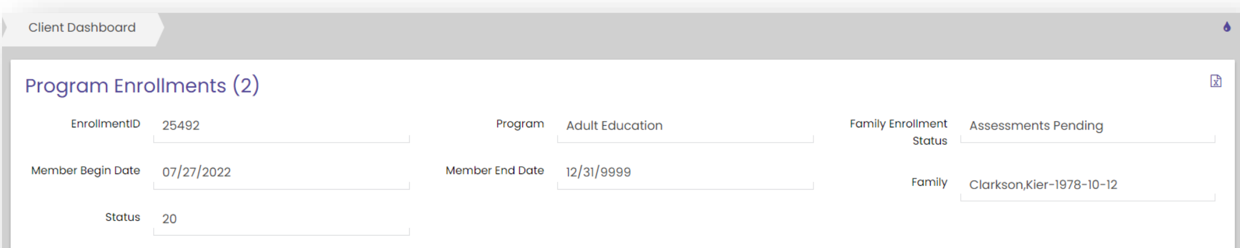


Notice how a couple of the properties change.

We can no longer add a link to the query. In other words, nothing will happen if the User clicks the query.

Instead of indicating the number of maximum rows to display, we can now select how many columns should display. However, it is important to notice only one record displays. The one record can be split to display in 1, 2, or 3 columns.

Notice how the widget differs on the dashboard.



Only one record is displayed, but more details from the record are available than what appears when rendered as a grid.

Also, record details are split into three columns because that is what we selected within the properties.

Also notice the count in the header indicates there are four enrollment records, although only one record is displayed. When we export the query, all records appear.

EnrollmentID	Program	Family Enrollment Statu	Member Begin Dat	Member End Dat	Family	Status
25532	Energy Assistanc	Assessments Pending	9/1/2022	12/31/9999	Clarkson,Kier-1978-10-1	20
25526	Family Services	Enrolled In Program	8/23/2022	12/31/9999	Clarkson,Kier-1978-10-1	100
25488	Family Services	Enrolled In Program	3/10/2022	12/31/9999	Clarkson,Kier-1978-10-1	100
25492	Adult Education	Exited From Program	7/27/2022	1/31/2023	Clarkson,Kier-1978-10-1	200

This concludes the *Query Widget* video. Next in the series, we will explore how to render the query's results using various charts.

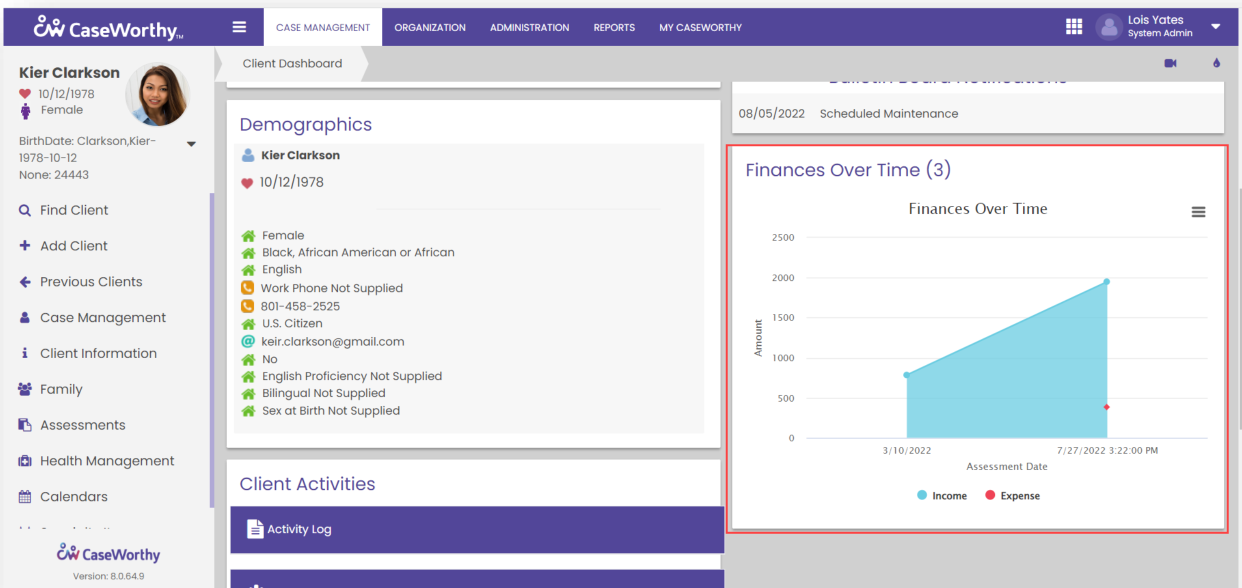
Query Widget Charts

This 5th and final video of the CaseWorthy *Dashboard apBuilder* video series explores how to render queries as charts in the Query widget.

Chart Overview

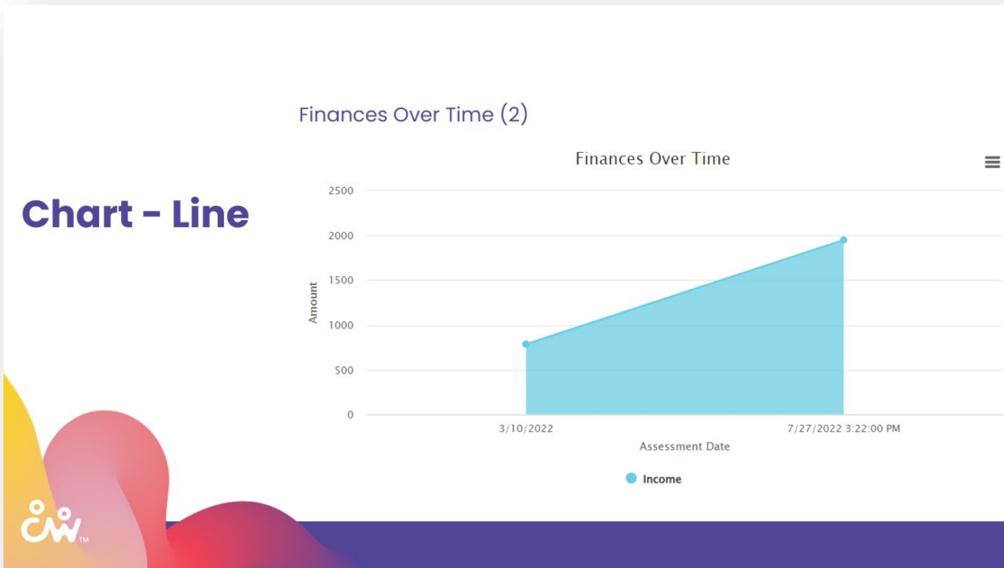
When we add a Query widget to the dashboard, we have the option within its properties to render the query as a grid, table, or chart.

Charts can be extremely useful when displaying query data that is counted, sorted, or grouped. The Finances Over Time query here on our dashboard is a chart.

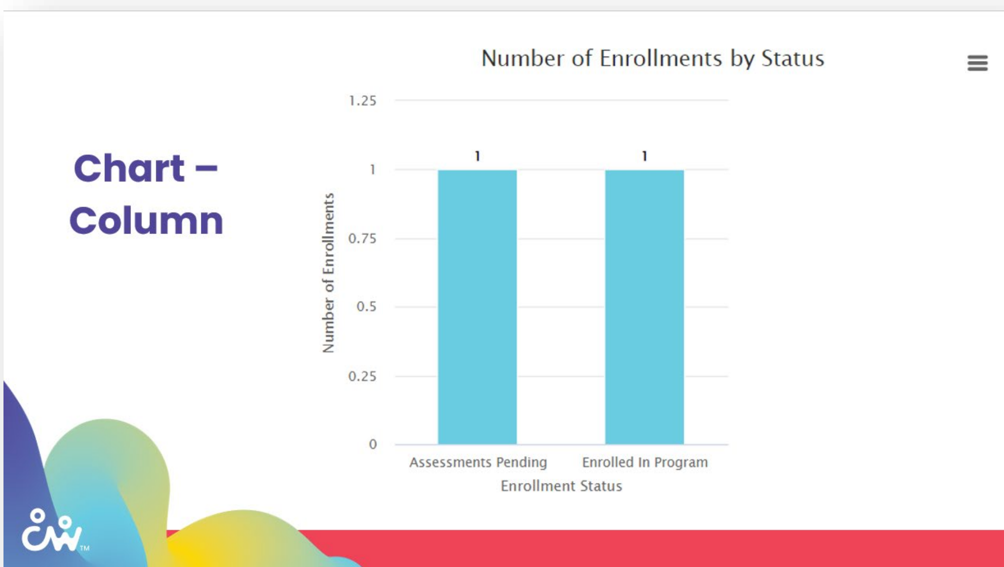


Within the Dashboard apBuilder, there are multiple chart types available, and they can all be customized according to your Organization's needs. The three most commonly used charts within CaseWorthy include:

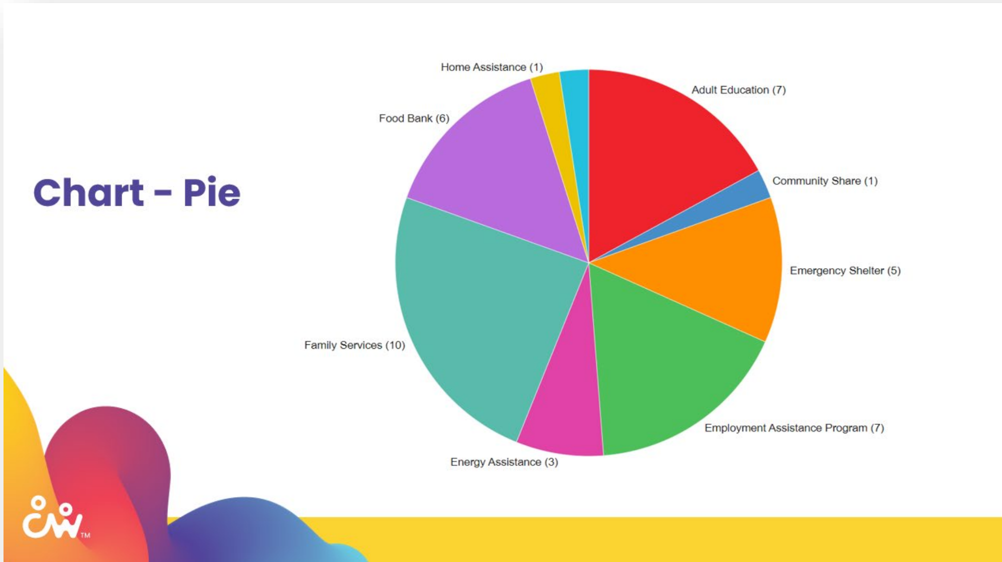
- The Line Chart.



- The Column Chart.



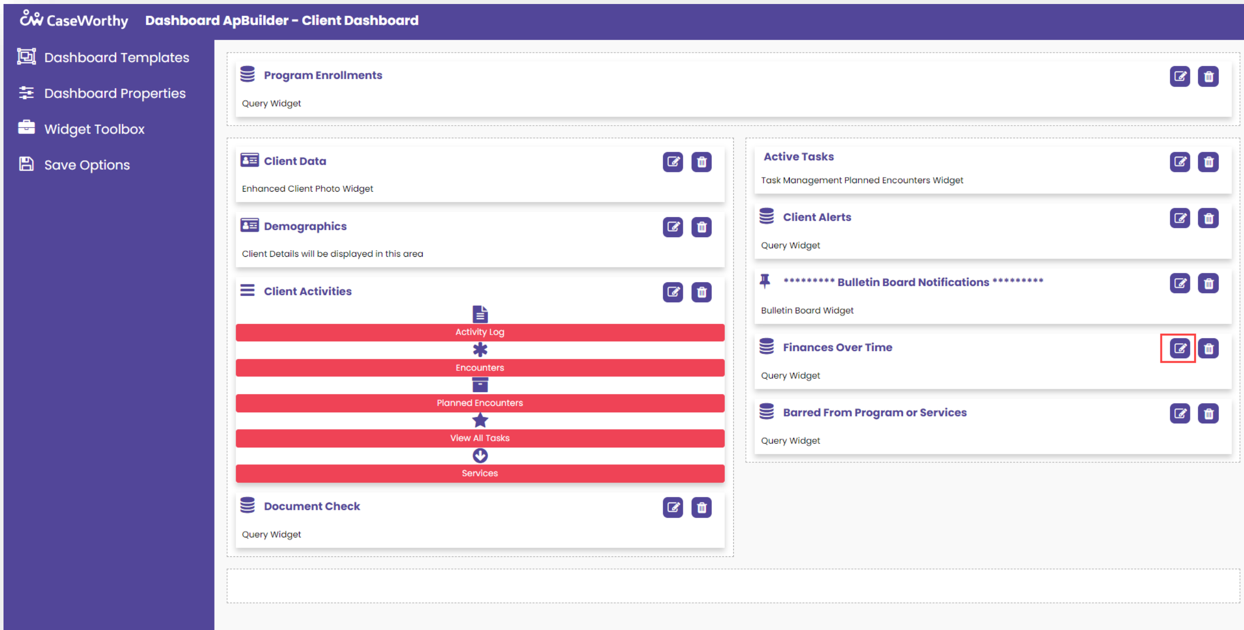
- And the Pie Chart.



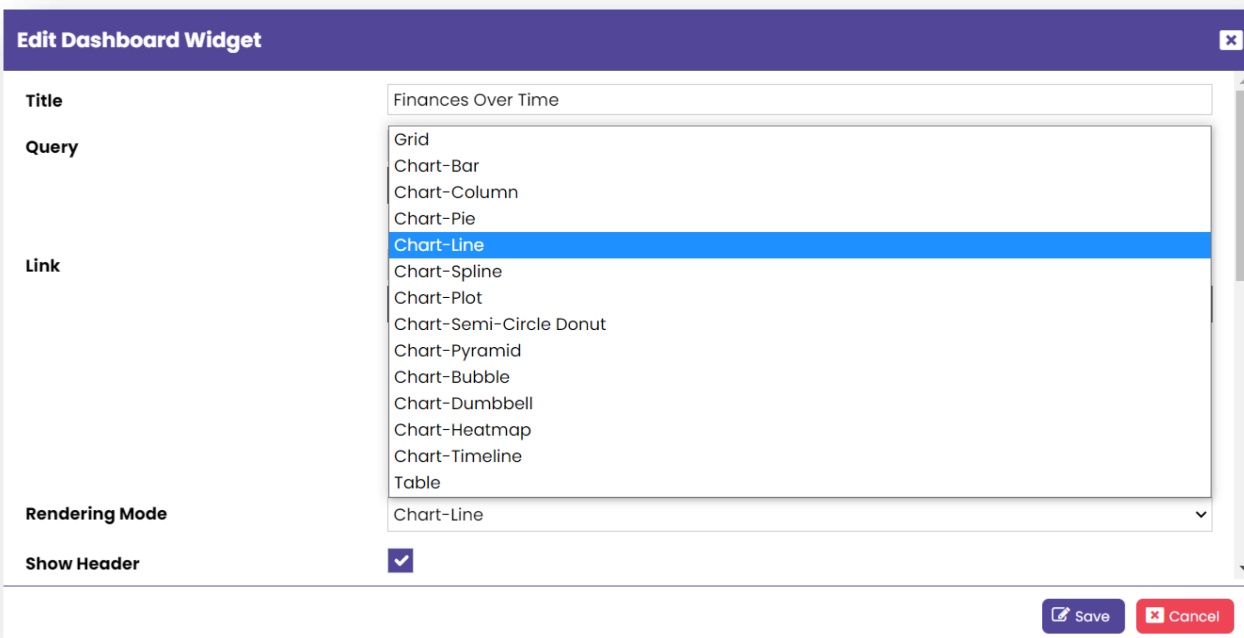
In the previous video, we added a new query widget titled Program Enrollments and rendered it is a grid. In that example, we walked through each of the query's widget's properties. Now, let us see what the properties look like when a query is rendered as a chart.

Chart Properties

On our dashboard, Finances Over Time uses a baseline query rendered as a line chart. Instead of adding a new query, let us review these properties.

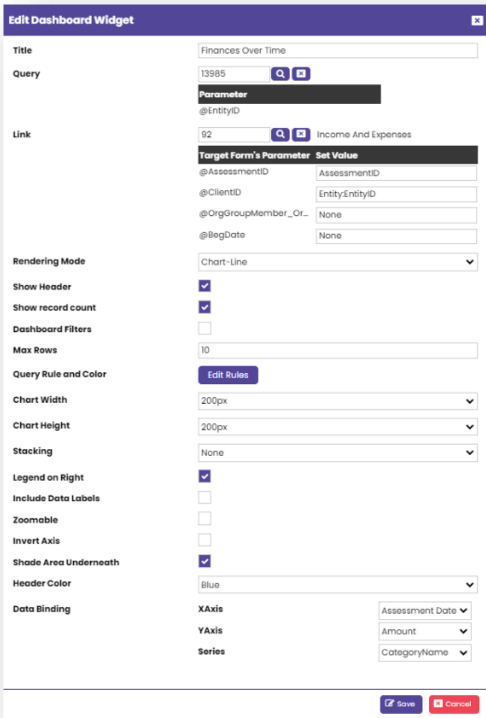


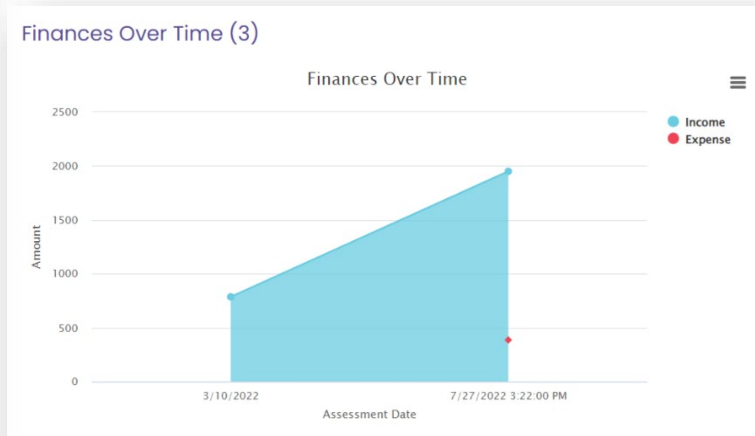
In the last video, we first rendered our query as a grid, and then as a table. Notice here, the **Rendering Mode** is 'Chart-Line'



Because this is rendered as a chart, the properties differ significantly from those of a grid or table query.

You can see the **Title** and **Query** displayed here.



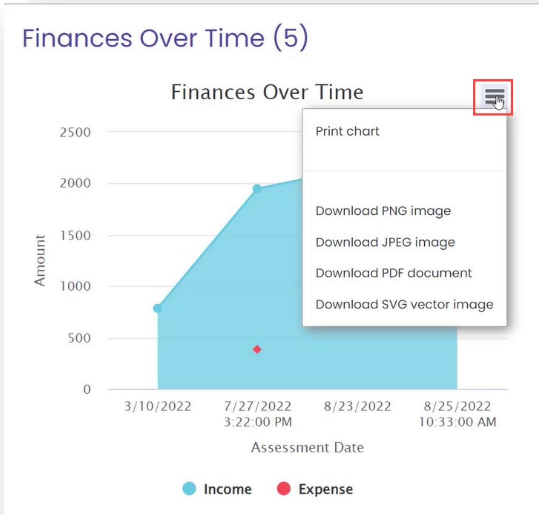


Also, the **Show Header** and **Show Record Count** are selected to show.

Notice how the title of the query shows in both the header as well as above the chart. Titles show by default on charts which may be a reason to not use the **Show Header** property.

Max Rows is set to '10'. Remember, this property sets the maximum number of records to present in the widget. The selected query returns data gathered from *Income and Expenses* assessment. If more than 10 financial assessments have been entered for the Client, only the 10 most recent would be represented here.

Notice, charts do not include the Excel Export property. Instead, they include the Chart Context Menu which allows the User to print or download the chart in multiple formats.

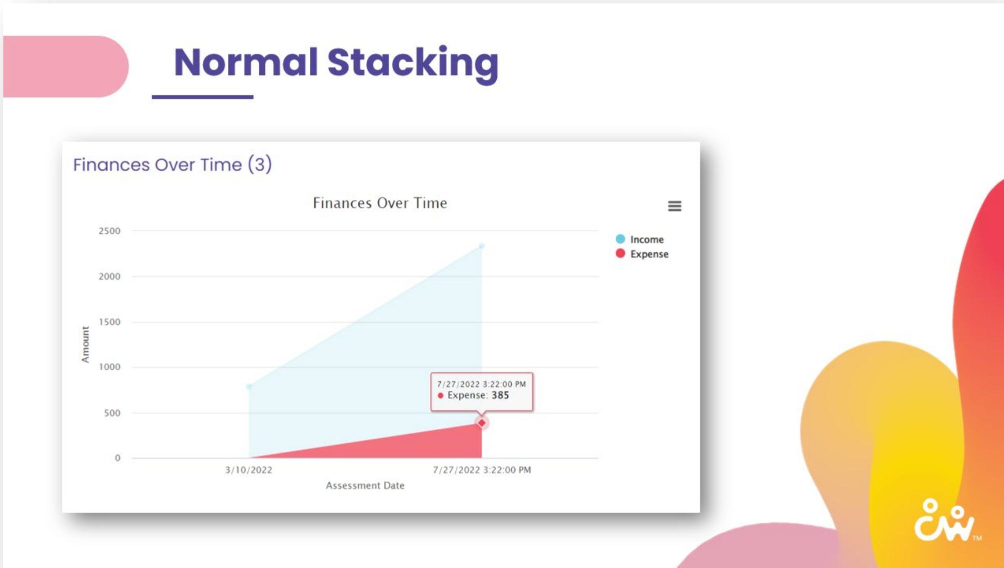


All charts include the **Chart Width** and **Chart Height** properties. These determine how much space the chart occupies on the dashboard. Both properties include dropdowns to select the pixel sizes.

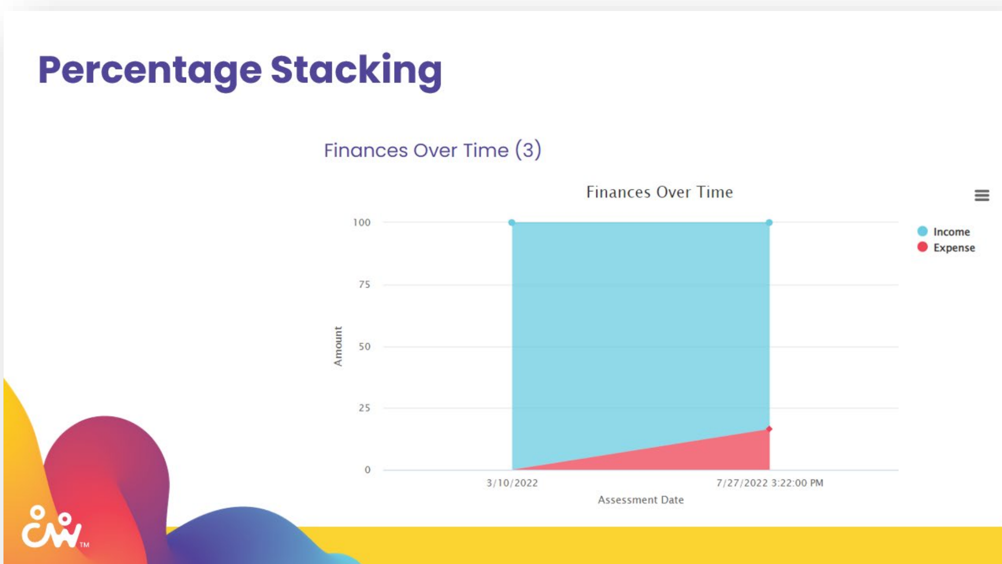
Stacking

Stacking allows for a series to be placed on top of another without overlapping. Using the **Shade Area Underneath** property below also helps to emphasize these stacks. Options for stacking include 'Normal' and 'Percentage'.

Here is an example of 'Normal' stacking where the data series are stacked upon one another.

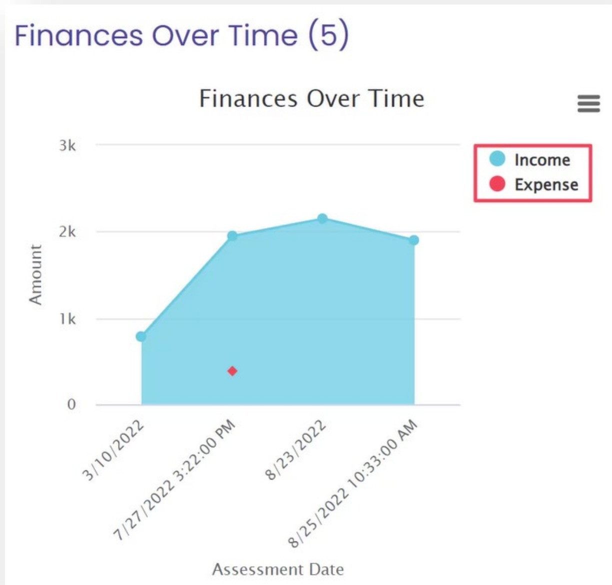


This is an example of 'Percentage' stacking where the shading fills the plot area and draws each point of data, with a relative percentage, to all the points in the same category.

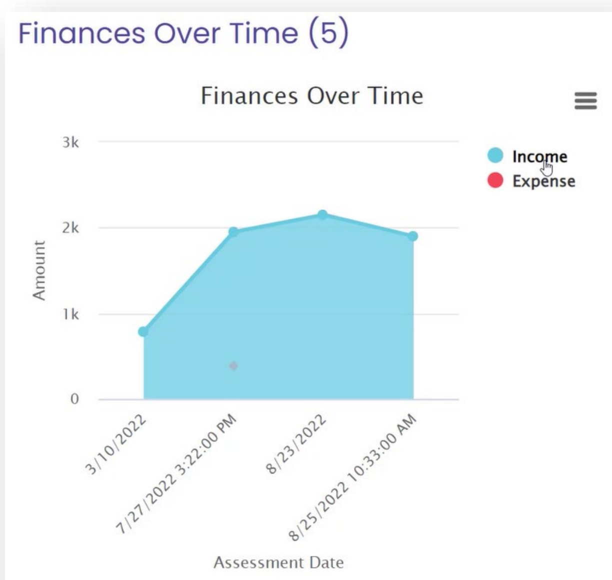


Legend on the Right

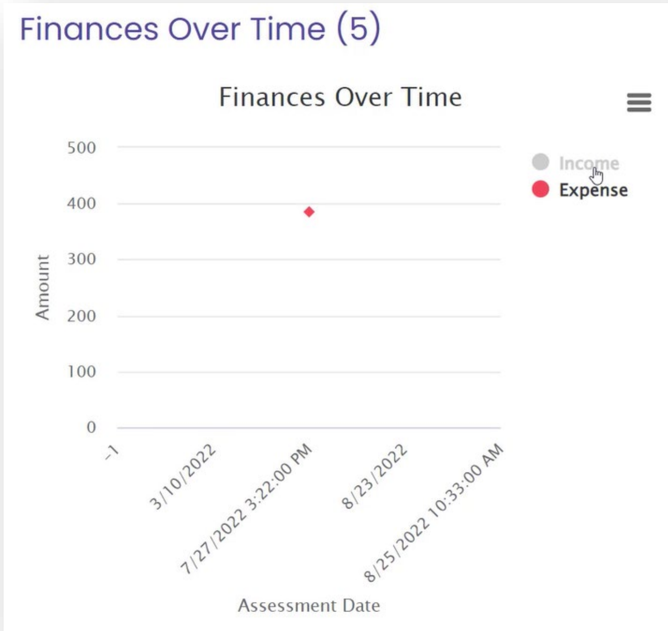
All charts also include the option to show a **Legend on the Right**. If selected, a definition of each color, or other chart items, will appear for each series.



Hovering on a legend item will make that series more prominent.

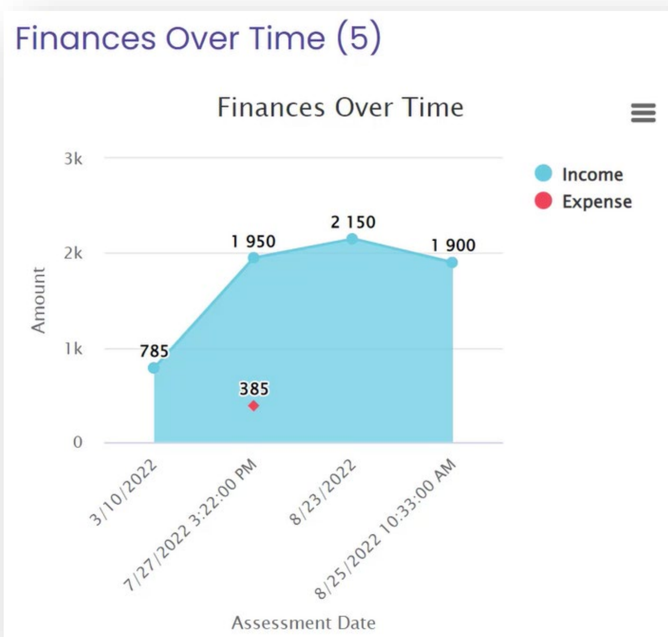


Clicking on a legend item will hide the series from the chart

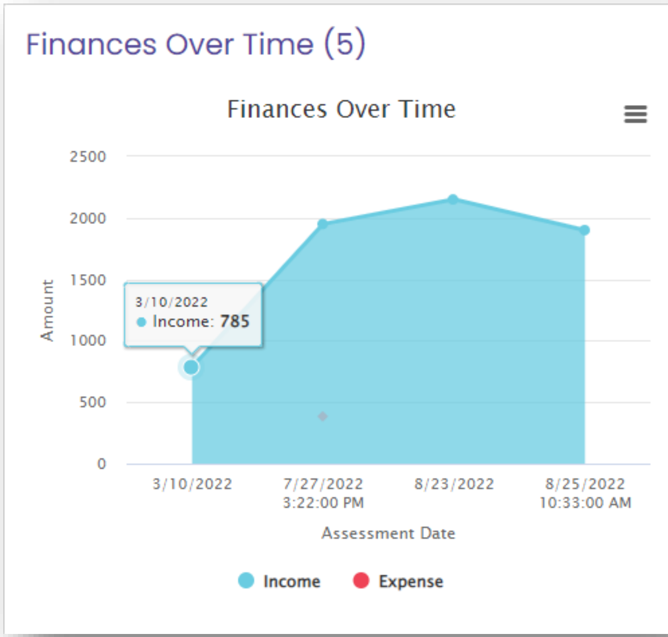


Include Data Labels

Include Data Labels affixes a viewable label at each data point.



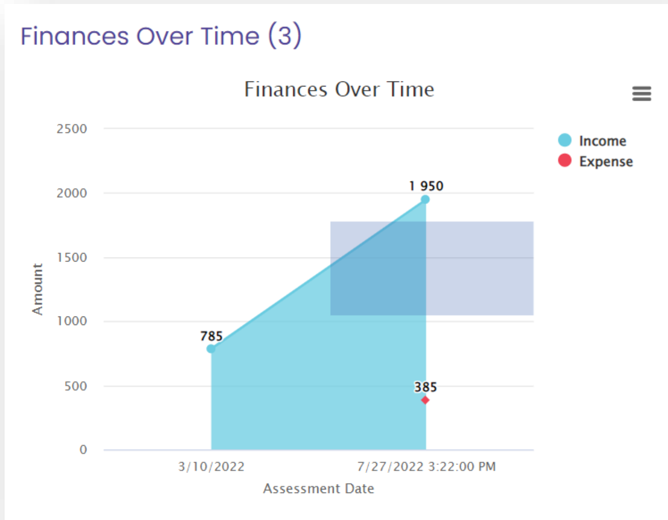
The data also will display when hovering over the data points with or without data labels included.



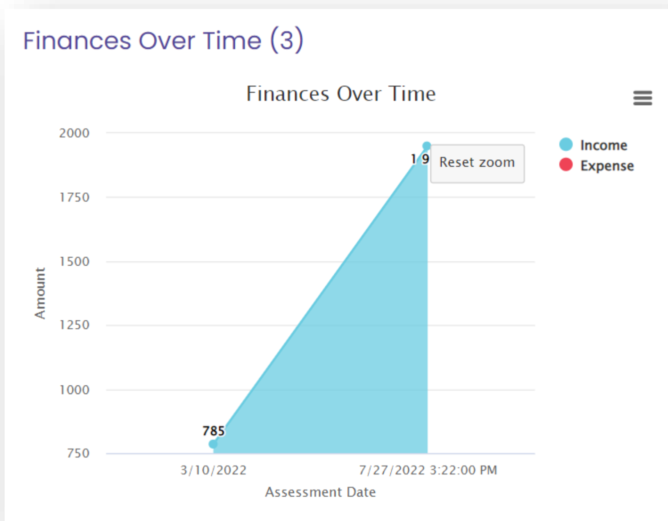
Zoomable

The **Zoomable** property gives the User the ability to zoom in on the chart.

To zoom in, select an area of the chart by clicking and dragging to highlight a rectangular area of the chart.



When released, the chart will zoom in on that area on the Y-Axis.

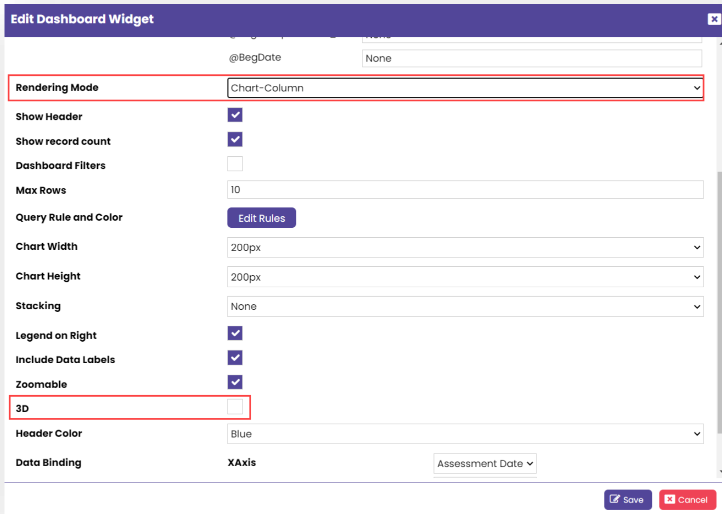


You can continue to highlight areas to zoom in further to the Y-Axis.

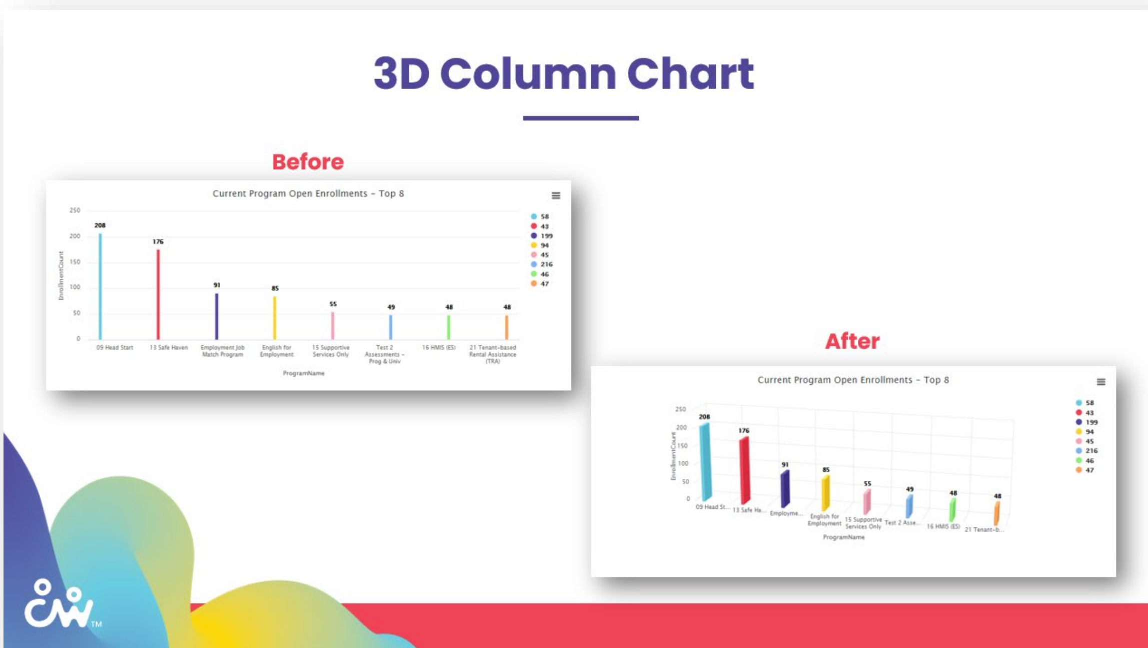
Click RESET ZOOM to return to the original chart view.

3D

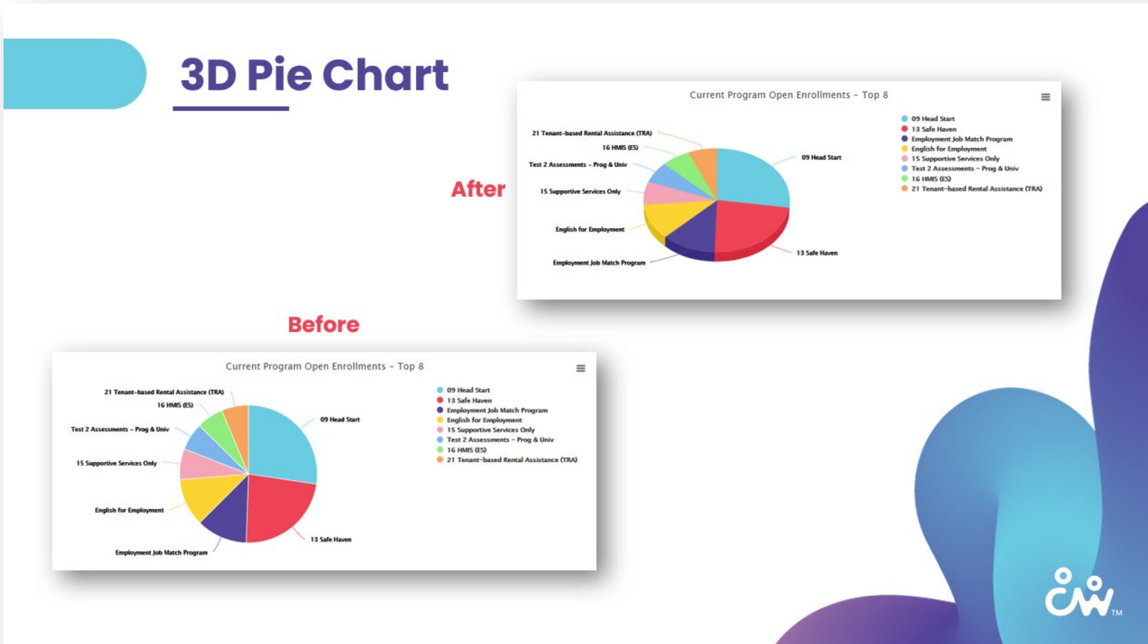
In this example, we are working with a line chart. If we had selected a column or pie chart as the rendering mode, an additional property would be available here to display the chart in 3D. This option changes the two-dimensional chart and presents it as three dimensional.



Here is an example of a column chart in both two dimensions and three dimensions with the **3D** option selected.



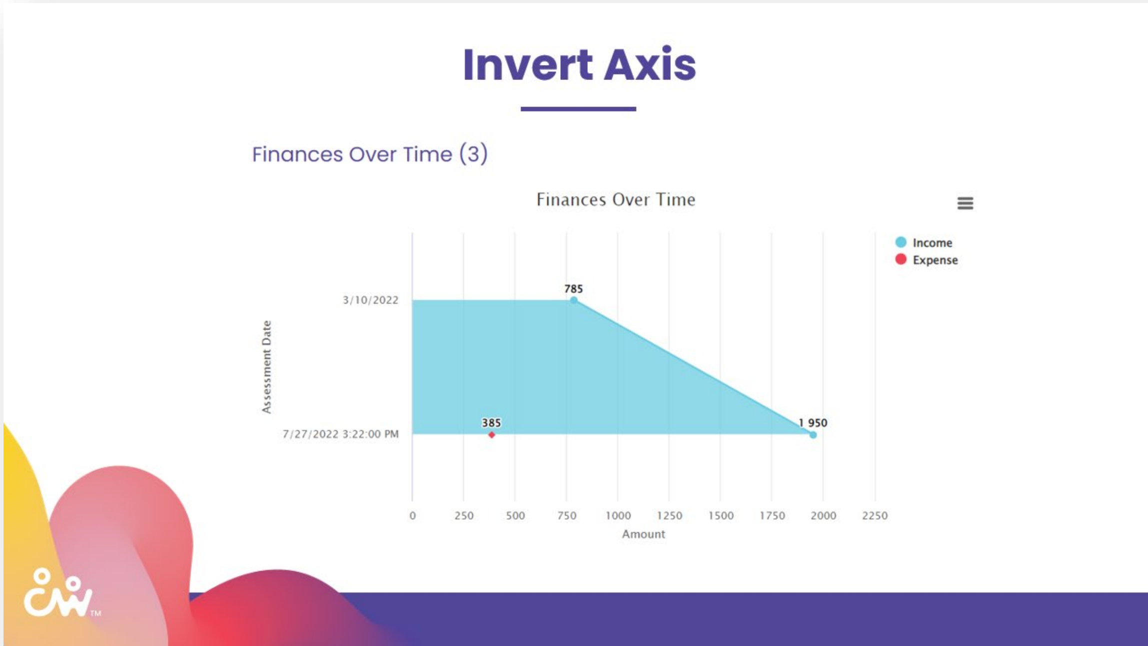
This is an example of a pie chart in both two dimensions and three dimensions with the **3D** option selected.



Invert Axis

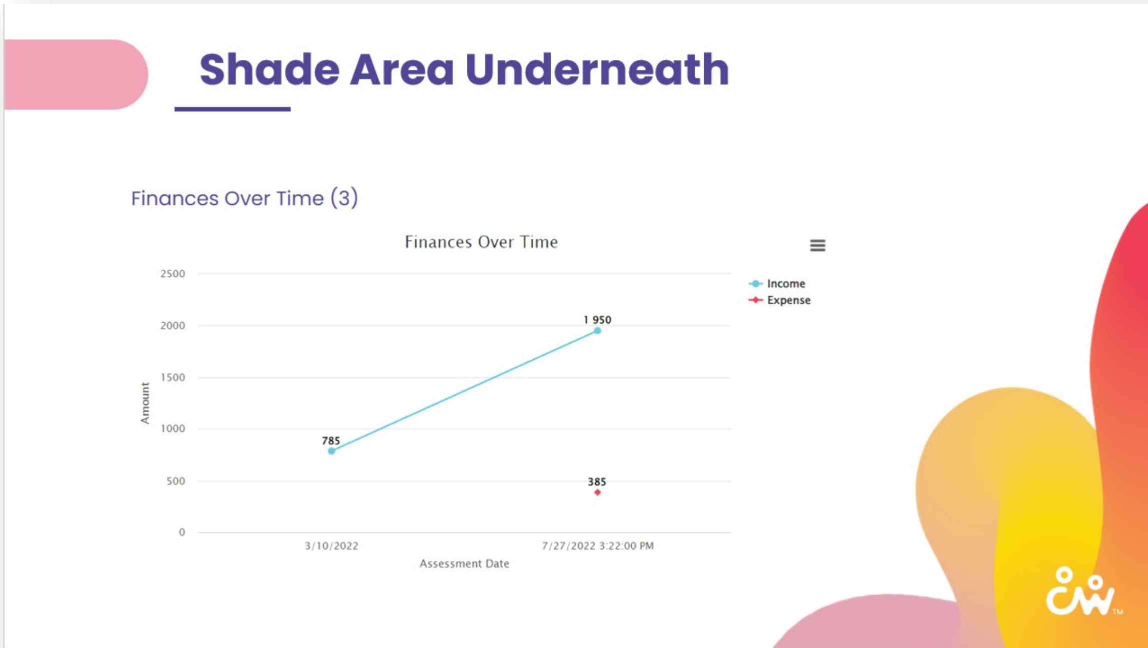
The next property is **Invert Axis** allows you to flip the chart, making the X-Axis vertical and the Y-Axis horizontal.

For example, this is how the Finances Over Time chart appears inverting the axis.



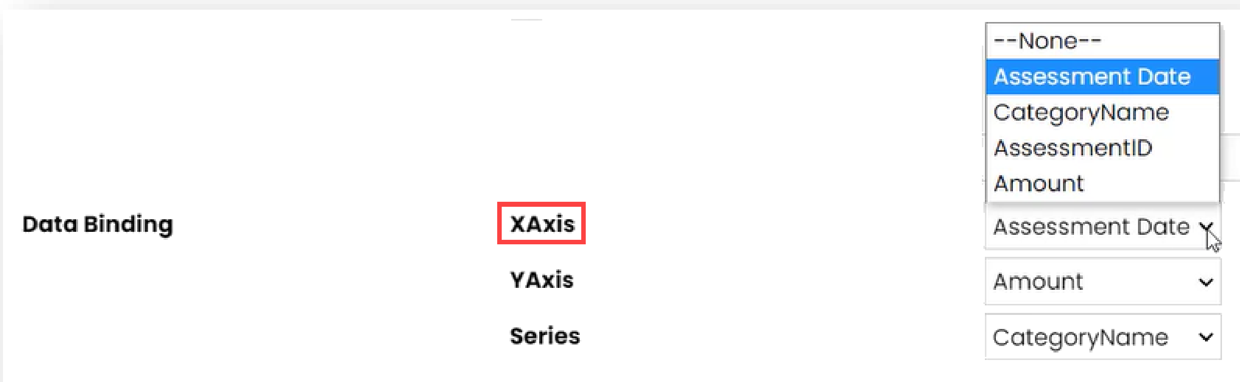
Shade Area Underneath

The next property is **Shade Area Underneath.** This property is already selected for this chart, and thus the shading appears, which helps to display the data more clearly. If the option were not selected, only the data points and line would display like in this example.



Data Binding

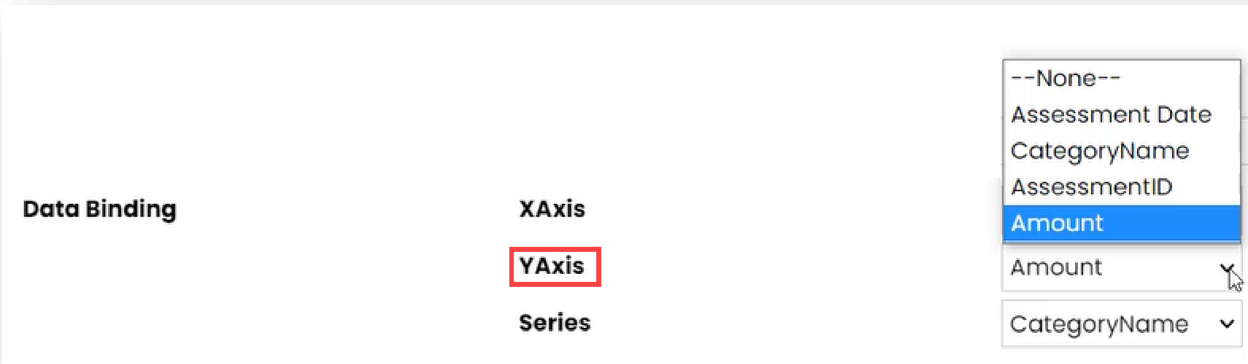
The final chart property for the query widget is **Data Binding**. This is how you define the X-Axis, Y-Axis, and series.



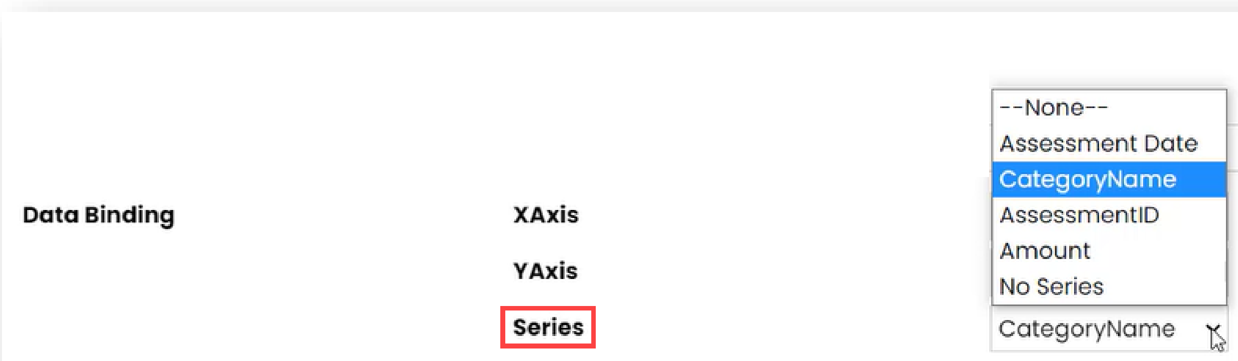
Each of these options includes a dropdown listing the columns available from the selected query. These can be changed and customized to your Organization's needs.

For line, column and pie charts, the X-Axis typically represents the records. These values should be a string, number, or date. In this example, records include the different assessments defined by the date and time they were completed

The vertical Y-Axis typically represents a count or an amount and must be a number. The Y-Axis is showing the monetary amount here.



The **Series** defines how the data is sliced or grouped which, again, is defined in the legend. The Series must be a string, number, or date. For this chart, 'CategoryName' is referring to the financial type categories – Expense and Income, which are each displayed as a series on the chart.

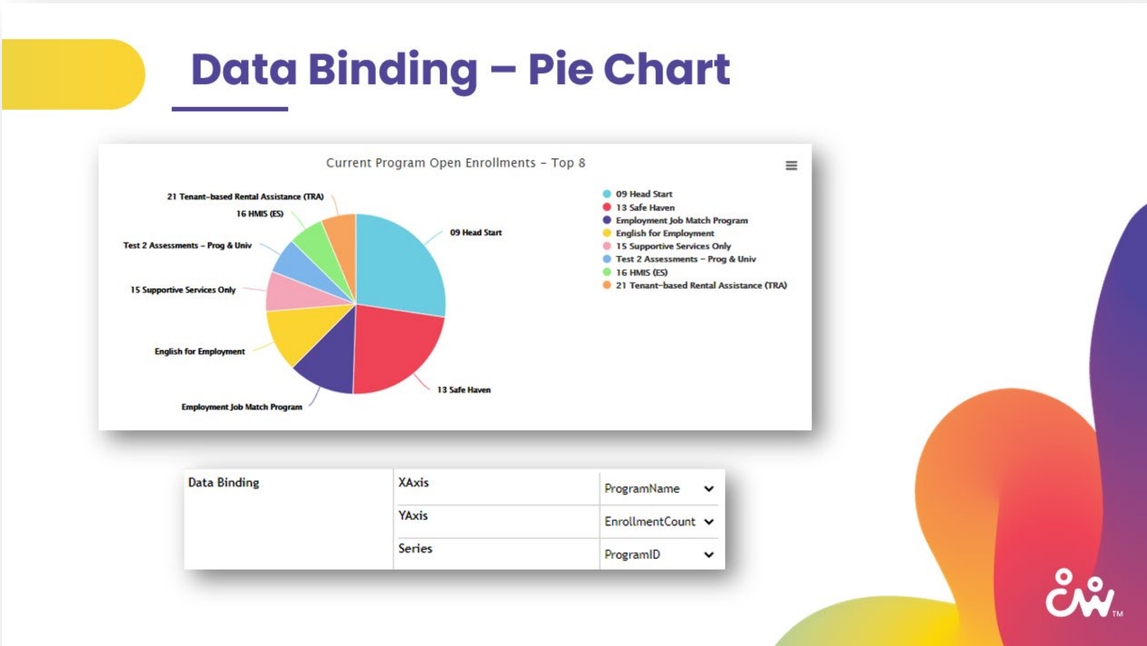


Here is an example of a column chart and its data binding properties.

This chart is configured to display enrollments by status for a family. The X-Axis is set to show each enrollment status, the Y-Axis shows the number or count of enrollments, and the series is set to show for each family member. The legend includes the member's names.

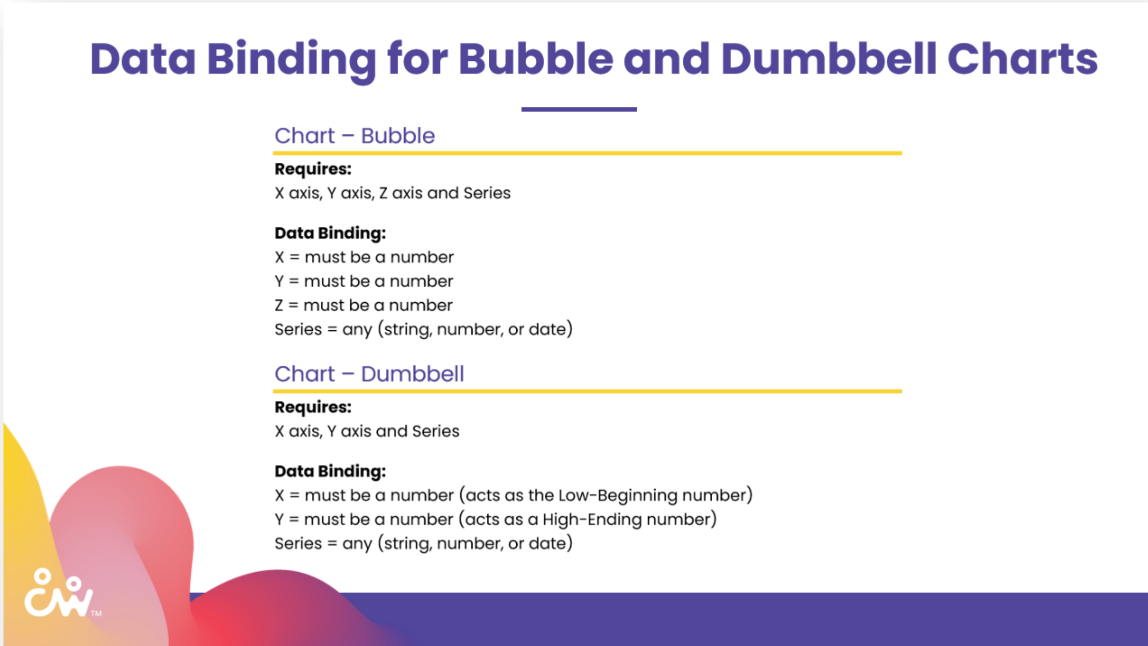
If there were more than two members for this family, there would be a series or column, for each additional member.

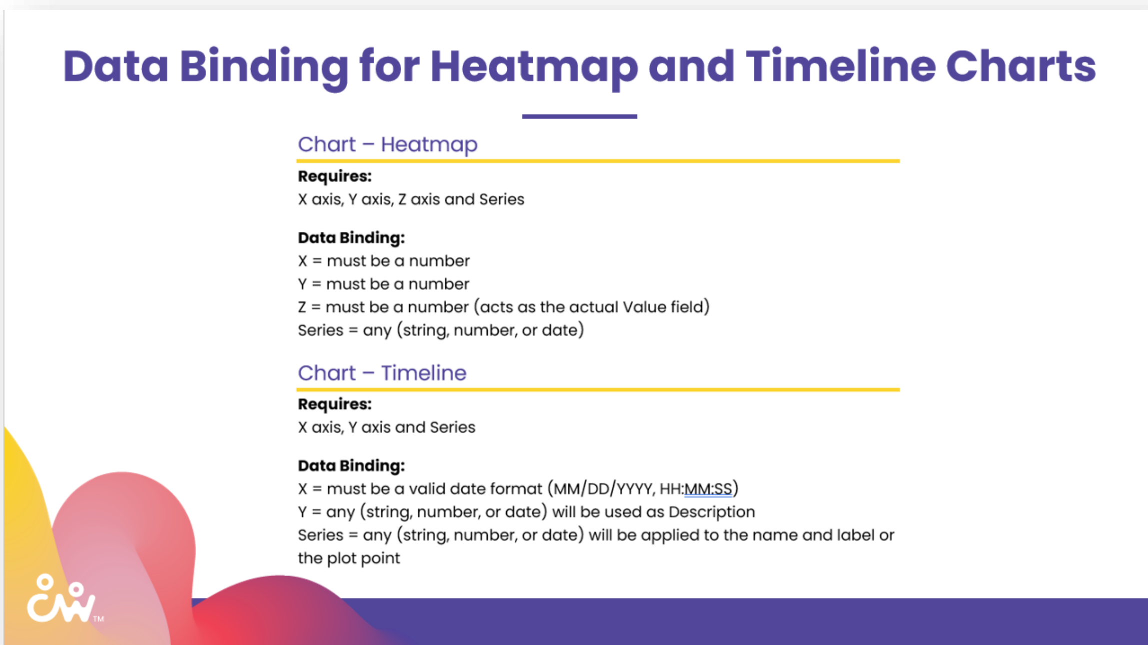
Here is an example of a pie chart and its data binding properties.



This chart is configured to display the top eight program enrollments for an Organization. The X-Axis defines what each part of the pie chart represents, which are the names of programs. The Y-Axis defines the count of enrollments per program. Pie charts do not always have to include a defined series, but this one does. Occasionally programs have the same names but are used differently. Therefore, in this example, the Program ID is set as the series.

Here are guidelines for Data Binding for the other types of charts available.





This concludes the *Dashboard apBuilder* video series.