

GLOBAL
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DAYS 2019

16.-19.09.2019

Eva Feigl & Jens Hafermann | abas Software AG

abas Dashboard - Getting Started & Hacks

Eva Feigl
Product Owner



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Software Developer



Agenda

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- Getting Started
- Widget Overview
- Advanced Topics
- Expert Topics
- Workshop

Getting Started

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- Where to find the dashboard?
- Who can use it?
- Which boards are delivered by default?
- How do I create a new dashboard?



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GETTING STARTED - DEMO

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Widget Overview

- Overview**
- Contacts**
- Prices and Discounts**
- Pipeline**

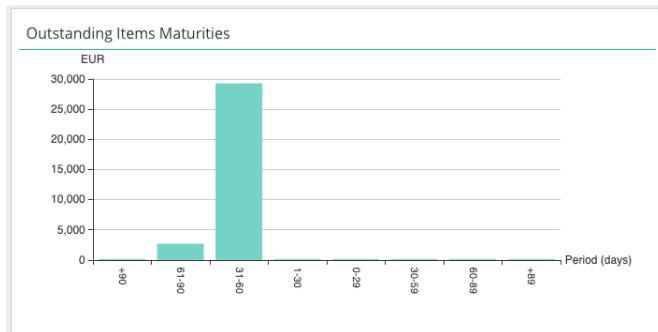


Customer

70010 Walter Maschinenelemente GmbH, KA X

Contact Details

Name	Street	Zip code	Town
Walter Maschinenelemen	Nördl. Uferstraße 12	76189	Karlsruhe
Country	Phone	E-mail	Website
GERMANY	+49 (0)721 / 33 55 44	info@maschinenelemente	www.maschinenelemente



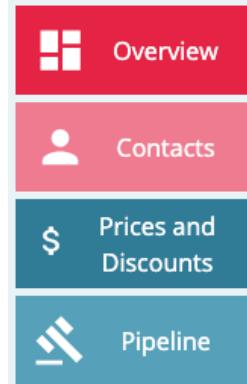
Outstanding Transactions

Type	Qty	Value
Opportunity	2	31,150.00EUR
Blanket order	0	0.00EUR
Quotation	3	177,141.00EUR
Web order	0	0.00EUR
Sales order	6	14,430.00EUR

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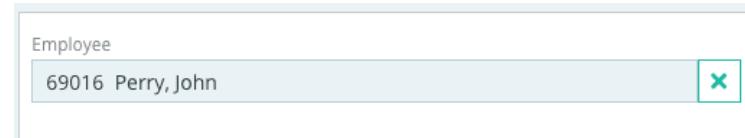
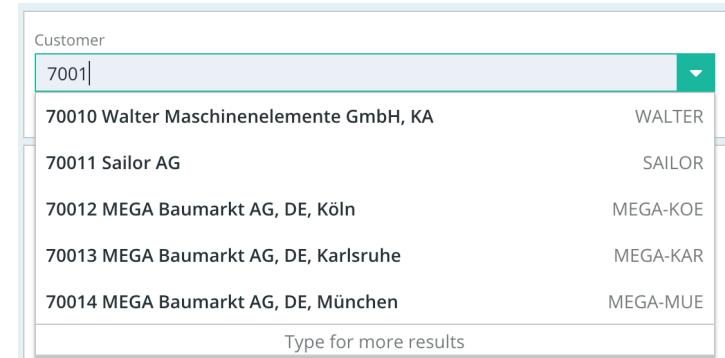
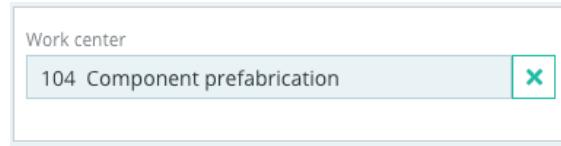
Button Widget / Quick Menu Widget

- Execute an action when clicking on it
- Examples:
 - Run ERP command
 - Link to other dashboard
 - Open external website
 - Update dashboard



Selector Widget

- Select records of any database
- Used to give other widgets a context
- Examples:
 - Customers
 - Employees
 - Work centers
 - ...



Detail Widget

- Show details for a selected record
- Must be connected to another widget (e.g. Selector Widget)
- Examples:
 - Contact details
 - Machine state informations
 - Location details
 - ...

Contact Details			
Name	Street	Zip code	Town
Walter Maschinenelemen	Nördl. Uferstraße 12	76189	Karlsruhe
Country	Phone	E-mail	Website
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Listings Widget

- Show data in a table
- Datasource: Infosystem or database
- Update other widgets with content from selected row
- Examples:
 - Vendor list
 - Outstanding transactions
 - Process details
 - ...

Outstanding Transactions		
Type	Qty	Value
Opportunity	2	31,150.00EUR
Blanket order	0	0.00EUR
Quotation	3	177,141.00EUR
Web order	0	0.00EUR
Sales order	6	14,430.00EUR
Packing slip	1	6,500.00EUR

Process details										
Alternative item	Product	Description	Qty.	Delivery date	Unit price	%	Total sum	Status	Project	
☒ No	☒ 30054	SABA flow valve DV50 wit...	40Pcs	05/31/19	210.00EUR	0	8,400.00EUR			
☒ No	☒ 30056	SABA flow valve DV65 wit...	50Pcs	05/31/19	325.00EUR	0	16,250.00EUR			

Indicator Widget

- Show a key value and optionally a comparison value
- Datasource: Infosystem or Database
- Accumulation of table rows is possible (count, sum, min, max, average, first, last)
- Show deviation between key and comparison value
- Examples:
 - Revenue current year
 - Outstanding items
 - ...

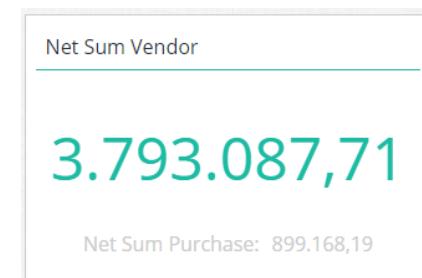
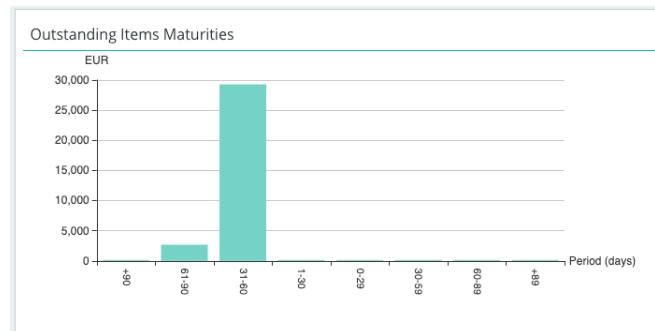
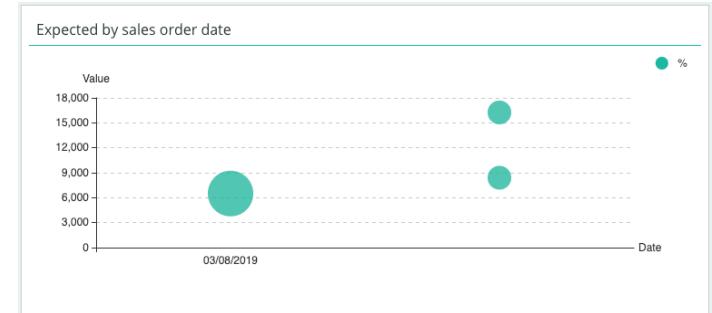


Chart / Scatter-Chart Widget

- Chart-Widget: Bar-, Line- or Donut-Chart
- Scatter-Chart-Widget
- Datasource: Infosystem or database
- Multiple data series possible
- Examples:
 - Revenue performance
 - Outstanding items maturities
 - Chances expected by probability





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WIDGET OVERVIEW - DEMO

Button Widget / Quick Menu Widget

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- External link:
Label: abas
URL: www.abas.de
Color: any, Icon: World
- abas ERP:
Label: New Customer
Command: Database, Customer, New
Color: any, Icon: Plus

Selector and Detail Widget together

- Selector:
Database: Customer
Title: Customer
- Details:
Database: Customer
Title: Customer Detail
outputfields: namebspr, str, nort, tele, email
-> activate „show captions?“

Listings-Widget

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- Database:
title: Customer Revenue
Database: Customer
result fields: namebspr, jums, jums2
- Infosystem:
use Template for document Occurrence
add vomvom=-600 to query
show and then add new result field: tabsvorkommen

Indicator-Widget

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- Database:
Title: Average revenue current year
DB: Customer, Outputfield: jums, function: average, color: mountain-meadow, unit: €
show and then add comparison value: jums2, average, silver, none, last year, €
- Clone the widget, change title to total revenue, change function to sum

Chart-Widget

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- Title: Document Occurrence
use IS template and show
change value-axis to tnettowert and show
change chart type to donut and show

Advanced Topics

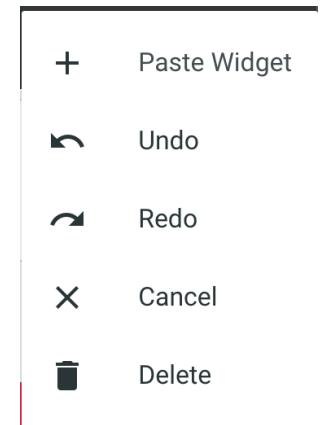
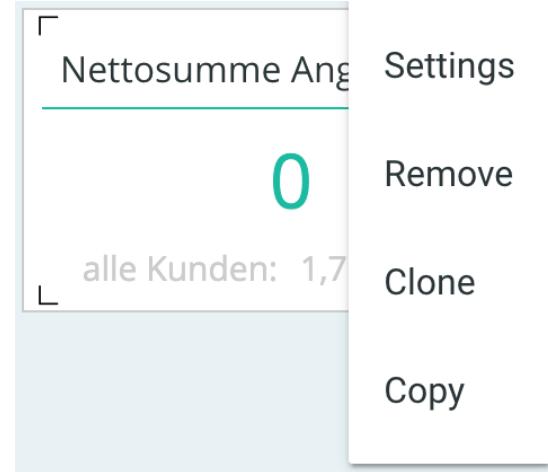
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- How to copy widgets?
- How to connect widgets?
- What are click actions?
- How to use dashboards on different screen sizes?
- How to configure a sidebar dashboard in webclient?

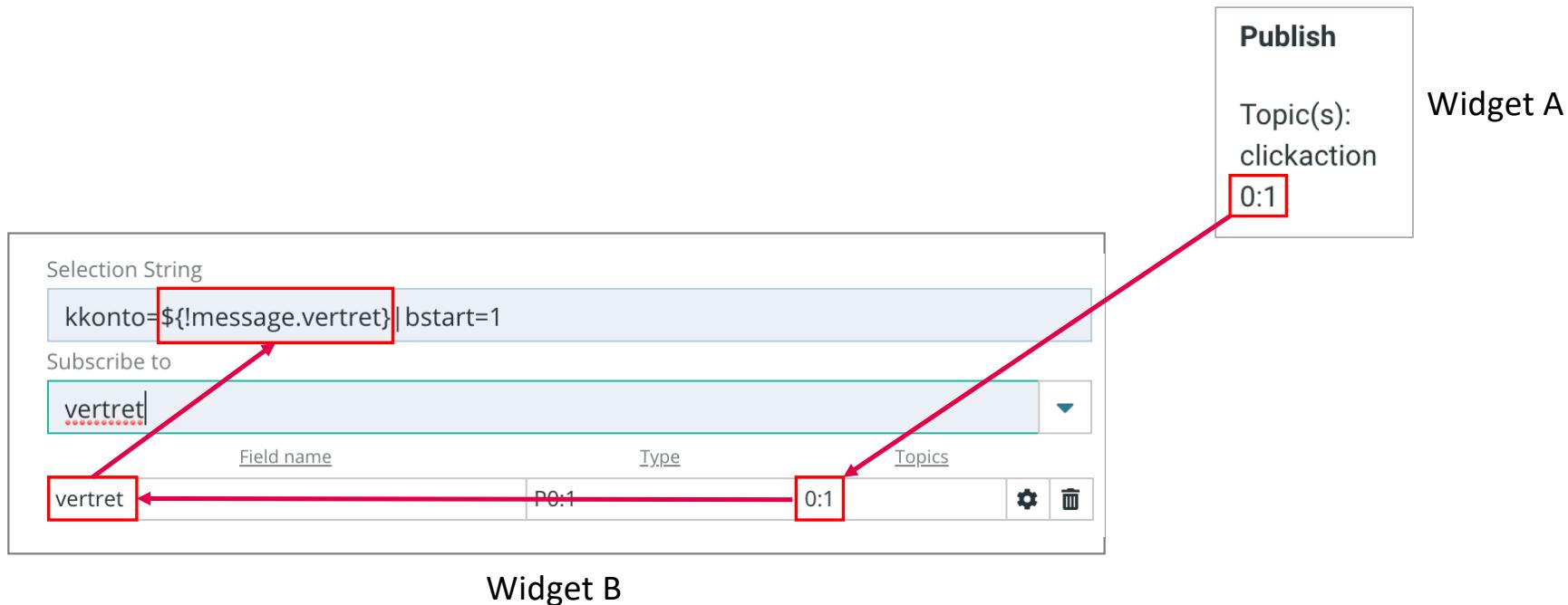
How to copy widgets?

- Copy a whole widget with configuration across dashboards
- Copy widgets via context menu of widget
Paste widgets via context menu of dashboard
- Copy widget with Ctrl + C
Paste widget with Ctrl + V



How to connect widgets?

Subscriptions for Databases



How to connect widgets? Subscriptions for Clickactions

Sales Pipeline

Type	Process	Subject	Valid until	Probability in %
Opportunity	700000C	SABA Durchflu...	07/25/19	25
Opportunity	700000C	SABA Durchflu...	07/25/19	25
Opportunity	700000D	SABA Durchflu...	07/25/19	75

Details

Alternative item	Product	Description
No	30054	SABA flow valve DV50 ...
No	30056	SABA flow valve DV65 ...

Subscriptions

Subscribe to

Field name	Type	Topics
partner	P0:1.2.6.7	0:1

Result Display Configuration

Add result field

Visible	Field name	Caption	Alignment
<input checked="" type="checkbox"/>	tkotyp	Type	right
<input checked="" type="checkbox"/>	tbeleg	Process	right

Database

Verkauf:Position

Query string

kopf=\${!message.tbeleg};kunde=\${!message.kunde}

Subscriptions

Subscribe to

Field name	Type	Topics
kunde	P0:1.2.6.7	0:1

How to connect widgets?

Subscriptions in Button/Quick-Menu-Widget

The diagram illustrates the configuration of a button and its subscription settings.

General

- Label: abas-ERP client
- Value: erp
- Fixed: checked

BUTTON

- Label: Create opportunity
- Click action: abas ERP
- ERP command: <(Sales)><(New)>,(Opportunity)?kunde=\${message.kontext}

Subscriptions

- Add
- Field name: kontext
- Topics: 0:1 (highlighted with a red box)
- Subscribe to database

A red arrow points from the 'kontext' field in the 'Subscriptions' panel to the 'ERP command' input field in the '## BUTTON' section, indicating the connection between the two.

What are „click actions“?

- action called when clicking on the widget
- available in Button-, Quick-Menu- and Indicator-Widget
- Actions:
 - Run ERP Command
 - Link to other dashboard
 - Open external web site
 - Update the dashboard

abas Indicator Widget - Settings

Widget to visualize a key value and a comparison value based on infosystem or db query data

Field name	Type	Topics
infosystem template	net sum VK Zentrale (outputfield: tot)	
Infosystem	vk/VKZENTRALE	
Selection String	bstart=1	
Subscribe to		

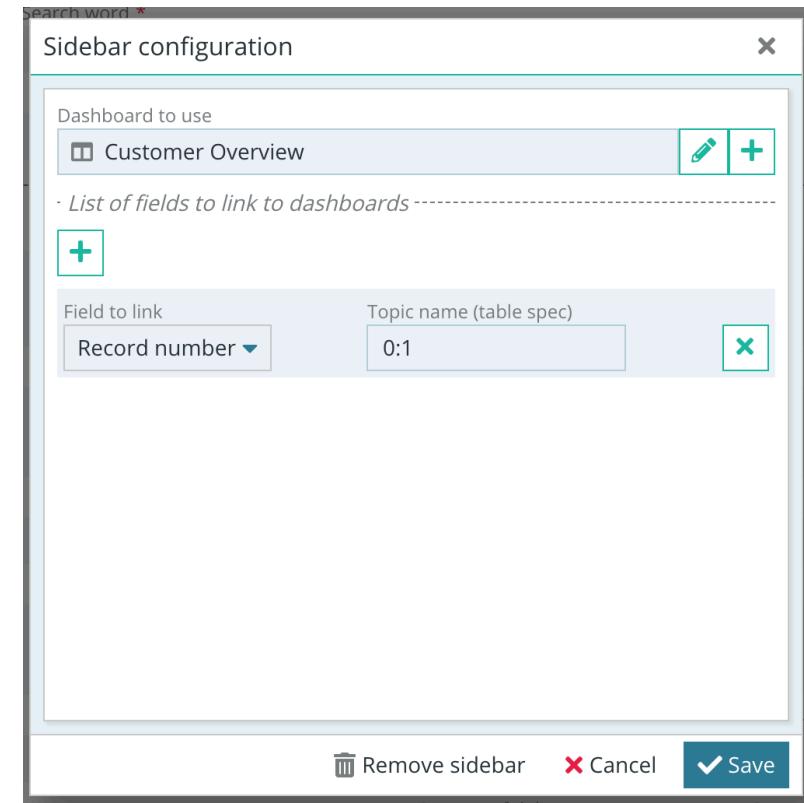
Indicator Settings	
Outputfield	tot
Function for table field	
Color of indicator	black
Unit (optional)	
none	no click action
update board	update depending widgets on board
abas ERP	open in abas ERP
dashboard	open other dashboard
external link	open an external link
Click action	

How to use dashboards on different screen sizes?

- a dashboard needs to be configured in 3 different sizes:
 - S: smartphone
 - M: tablet
 - L: laptop
- recommended solution: Full-HD (1920x1080)

How to configure a sidebar dashboard in webclient?

- configure your dashboard for screen size S (smartphone)
- activate the experimental feature sidebar
- configure the sidebar in the webclient





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ADVANCED TOPICS - DEMO

Expert Topics

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- Which url parameters are available?
- How to setup on-premise?
- How to integrate into the native UI?
- How to write my own widget?

Which url parameters are available?

.../webclient/?**dashboardId**=Sales&**mandant**=erp&**context**=0:1;(154,0,0)&**linkto**=native&**mode**=edit

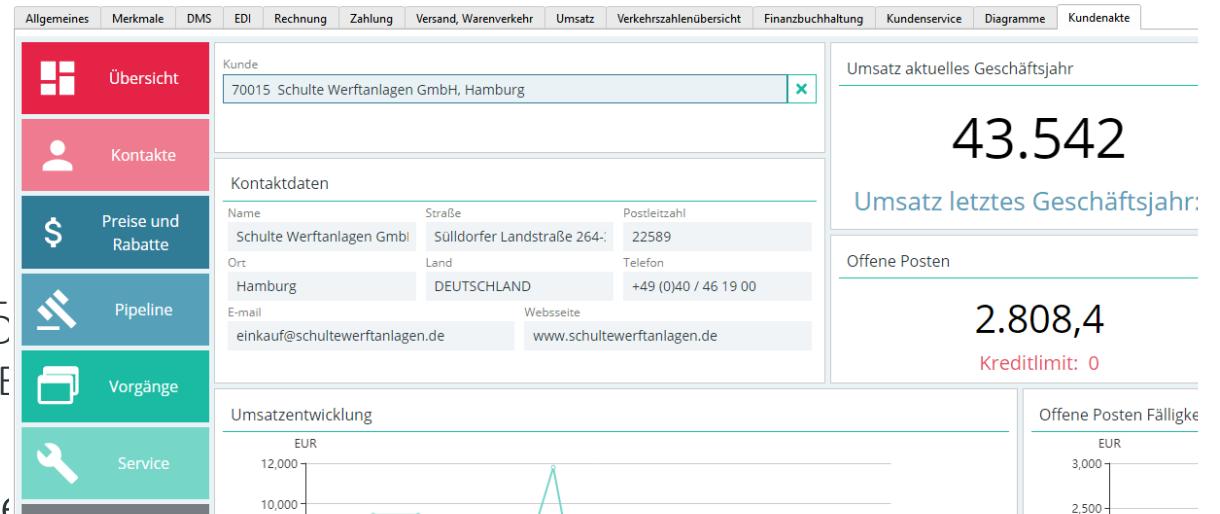
- id: id of the dashboard (in webclient it's „dashboardId“)
- mode: open the dashboard in edit mode
- context: handover one or multiple contexts to the dashboard, e.g. a customer and an employee
- mandant: set mandant via URL, parameter to use is \$MNAME from ERP
- linkto: where to open links from dashboard, v2(default, to webclient) or native (v1 is deprecated)
- chartFile: only used for erp chart viewer, path to Chart-File

How to setup on-premise?

- available via abas Installer
- minimum ERP Version 2018r04n14p06
- only for pilot customers
- further information:
<https://documentation.abas.cloud/en/abas-installer/>

How to integrate into the native UI?

- URL Call Parameter analogous to Business Apps
- Environment variable:
`DASHBOARD_URL=http://${DASHBOARD_HOSTNAME}${DASHBOARD_DOMAIN}:${DASHBOARD_PORT}/${DASHBOARD_CONTEXT}`
- with ERP version 2019 customer file points automatically to the dashboard



How to write my own widgets?

- a CLI (Command Line Interface) to write own widgets is available
BUT: deprecated and will be replaced by a new CLI based on Vue.js
- the best way if you want to write own widgets
-> contact us!

Best practices

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- Check the default boards and use parts as templates
- Use the copy & paste feature
- Check the tooltip from the error icon in the widgets to see some error message
- Add browser console content + screenshot to your support ticket

More information

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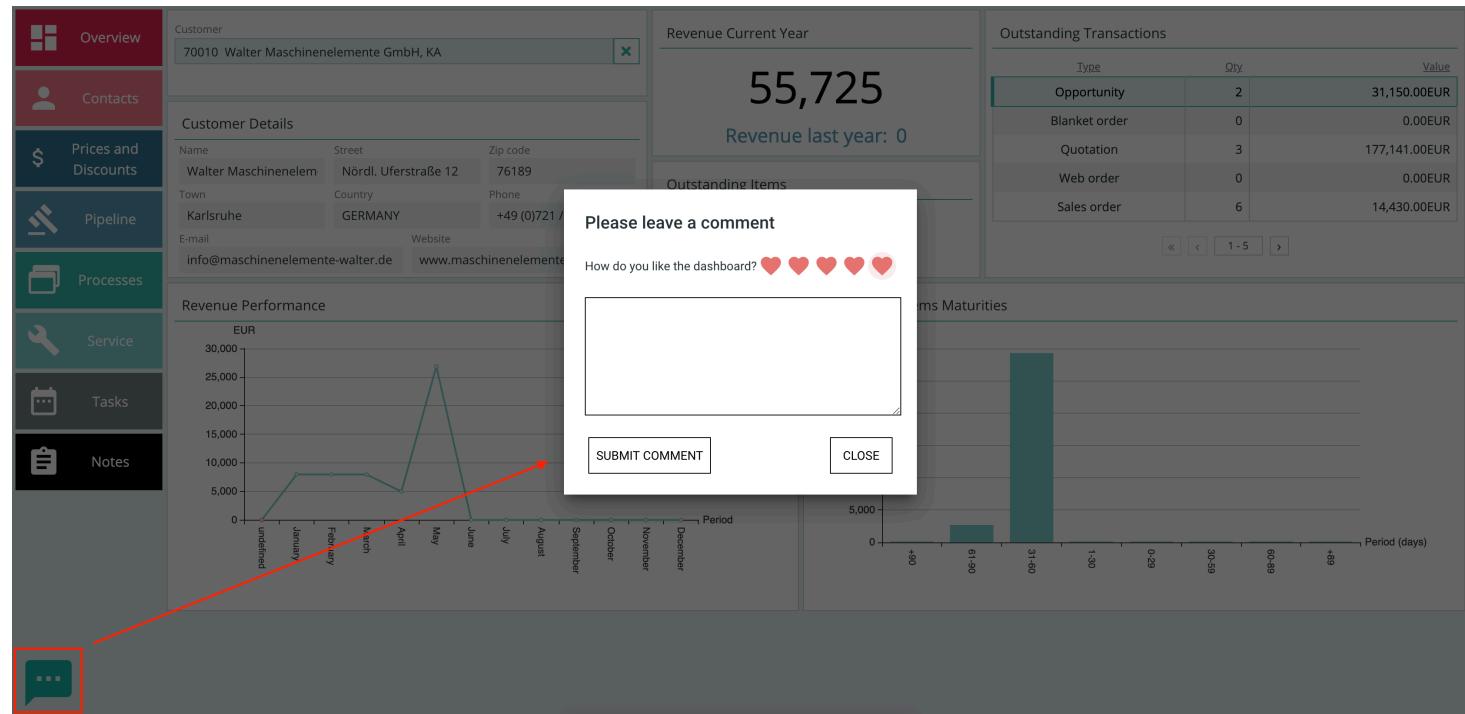
- Welcome Board
 - Streaming Widget
 - Best Practices
- Extranet
 - https://extranet.abas.de/sub_de/download-bereich/erp/apis-tools/abas-dashboard.php
- Reviews
 - biweekly (odd weeks) on Wednesday at 14 pm

Feedback

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- Feedback Button in the dashboard





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WORKSHOP

Tasks

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1. Create a new dashboard and rename it
2. Add a selector-widget and configure it for the customer database
3. Add a details-widget and configure it to show the name and the location of a customer
4. Add the weather-widget and configure it to display the weather for the location of your choice
5. Add a new weather-widget and configure it to display the weather for the location of a customer
6. Add a listings-widget and configure it to show all outstanding transactions for all customers (tip: use infosystem Belegvorkommen, check standard boards)
7. Configure the listings-widget to show only the outstanding transactions for the chosen customer in the selector-widget

Tasks

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8. Add an indicator-widget and configure it to show the average of revenue in current fiscal year for all customers
9. Add a comparison value in the indicator-widget configured before. The comparison value should show the maximum revenue in current fiscal year for all customers
10. Add a button widget and add a clickaction of your choice (link to other dashboard, run ERP command, update board, open external website)
11. Add a chart widget and show the same information as in the listings-widget (step 6) in a donut chart
12. Add another chart widget and show the same information in a bar chart
(tip: use the copy & paste feature)
13. Configure your board to look great on a laptop, as well as on a smartphone or tablet
(tip: check it via the chrome developer tools „toggle device toolbar“)

Tasks

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14. Configure a sidebar dashboard and integrate it in a webclient screen
15. Create your favorite dashboard and try out your own ideas!