

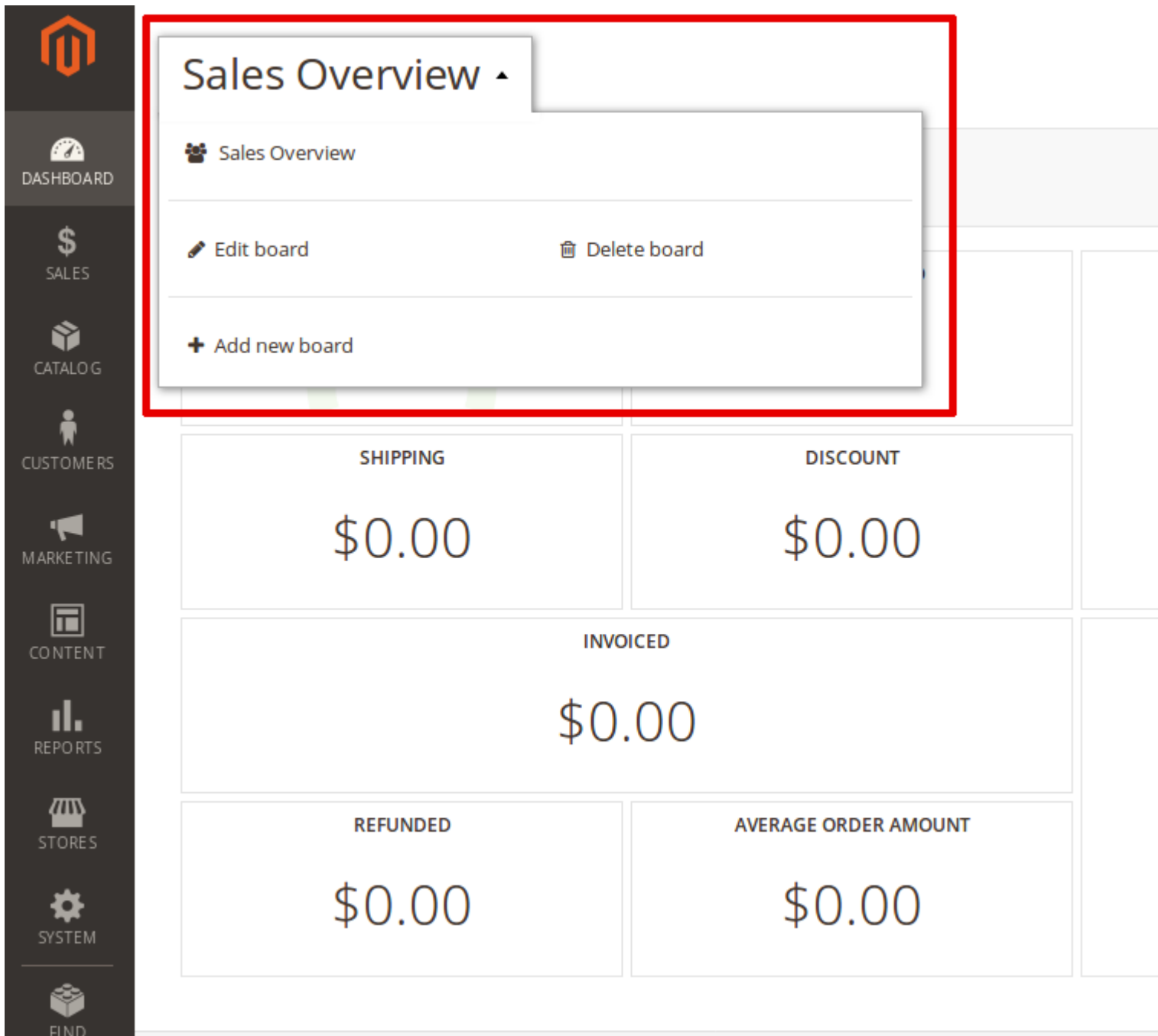
# Dashboard Manual

## Welcome to the Advanced Dashboard Guide!

Here you will find everything you need to set up and use an Advanced Dashboard.

## Managing Dashboards

Our Advanced Reports extension allows you to have more than one Dashboard, suited for different purposes. They all are located at **Dashboard -> Advanced Dashboard** section as a part of the menu:



It is divided into three sections:

- **Top** section allows you quick access to dashboards, that you had created.
- **Middle** section provides you with basic actions, that can be done on currently opened Dashboard: **Edit** and **Delete**.
- **Bottom** section contains a single action, which allows you to create new Dashboard

## Creating New Dashboard

Visit **Dashboard -> Advanced Dashboard**, open menu and press **Add New Board** action. You will be brought to the dashboard creation page, which contains the following fields:

- **Title** - a sensical name of your Dashboard.
- **Type**

- type of your new Dashboard. There are two different types:
  - o **Private Board** will be available only for current user.
  - o **Shared Board** will be available for all backend users, defined in **System -> Permissions -> All Users**.
- **Is Default** - whether newly-created Dashboard will be shown immediately after log-in.
- **Enable Mobile Access** - whether newly-created Dashboard will be accessible in Mobile mode.

## Note

This mode is very convenient for accessing dashboard data, but has some warranties:

- o Dashboard widgets editing mode is disabled.
- o Access to the mobile dashboard is granted according to the URL specified on the page and encrypted in the QR code. We recommend that you use any QR-reader on your mobile device to read such an URL.
- o Dashboard URL itself is highly encoded to limit the ability to remember/copy URLs by an unauthorized person.

Please note that there is **no other suitable protection** for the mobile dashboard. If you are not sure, do not enable this option.



Press **Save** to create your new Dashboard.

This will create only a template for a Dashboard. To complete creation, you need to add one or more [Blocks](#) to your newly-created Dashboard Panel.

## Adding Blocks to Dashboard

After Dashboard is created, you need to add there blocks. Open your newly-created Dashboard, and press **View Mode** button, which is located in the right end of title ribbon:

My New Dashboard ▾

May 1, 2018 - May 31, 2018  

It will bring you to the Blocks Configuration mode, as shown below:

# My New Dashboard ▾



To add a block, press **Add Block** button on the title ribbon. It will create an empty block rectangle, as you can see on screenshot above.

This block has four buttons on its bottom pane:

- **Move** - allows you to move block visually on marked zone. You can also resize block, if you wish - just drag and drop its right-bottom corner.
- **Settings** - allows you to select data, which will be displayed on that block (read more below).
- **Refresh** - allows you to preview (or refresh) previewed data in Edit Mode.

## Note

By default, each block is reloaded once a minute to ensure that the dashboard always contains up-to-date data

- **Delete** - removes block.

You can add to the block either statistical data, or tables. Press **Settings** button (second on the block button pane), and you will see Metrics Edit Panel:

## General Information

---

Title

Description

Block Type

## Time Range

---

Override dashboard time

## Table

---

Dimensions

Column for grouping data in the table

Columns

Sorting

Rows Limit

## Filters

---

Add Filter

As you see above, it contains of the following fields:

- **General Settings**
  - **Title** - a sensical title for a metric. It will be displayed as title of your block.
  - **Description** - short description of your block.
  - **Block Types** - defines view, in which data will be presented. There are three possible values:
    - **Single Value** - in this mode only first selected data field will be displayed.
    - **Table** - in this mode multiple fields can be displayed.
    - **Chart** - in this mode a block will be presented as chart
- **Time Range**
  - **Override Dashboard Time** - by enabling this option, you can fix your block on specific period. Otherwise, data on your block will be displayed according to date range, selected for current

Dashboard.

### Note

Blocks with overridden time ranges are marked with special icon at upper-right corner.

- **Range** - is a hidden field, which appears only when **Override Time** mode is used. Allows you to pick up a range, for which block should display data.
- **Compare To** - is a hidden field, which appears only when **Override Time** mode is used. Allows you to pick up a range, which shall be used for comparison.
- **Filter** - allows you to filter raw data, used by this block, with one or more filters. Read more about it [below](#).

Depending on **Block Type** parameter, you can also set additional visualization options.

If **Block Type** is **Single Value**, then you will see next options:

- **Metric** - select column that should be used for building the block.
- **Spark Line** - is the curve line chart, which displays dynamic of selected value by dates. If you had selected **Compare To** option in
- **Comparison** - Allows you to pick up a range, which shall be used for comparison.

If **Block Type** is **Table**, then will available the next options:

- **Dimensions** - select column that will be used for group the report.
- **Columns** - allows you to select, which columns should be displayed
- **Sorting** - choose sort order
- **Rows Limit** - allows to set limit for rows.

If **Block Type** is **Chart**, then will available the next options:

- **Dimension** - select column that will be used for group the report.
- **Columns** - allows you to select, which columns should be displayed
- **Comparison** - Allows you to pick up a range, which shall be used for comparison.

## Selecting Metrics Data

Selection of Metrics data is a little tricky. Field **Dimensions** and **Columns** in Metrics Edit Pane contains all available fields in selected category. There are the following Categories:

- **Orders** - allows you to analyze orders.
- **Order Items** - allows you to analyze products, that was bought by customers.
- **Order Payments** - completed payments
- **Order Transactions** - transactions (e. g. all actions, such as invoicing or shipping), which performed on your orders.
- **Taxes** - extracted taxes for all actually paid orders
- **Order Addresses** - addresses, that used as billing or shipping in orders.
- **Quotes** - quotes, created by customers (includes abandoned).
- **Quote Items** - products, that customer placed to the quote.
- **Invoices** - invoices, created for your orders.
- **Postcodes** - postal codes, used in billing and shipping addresses (used, for example, to determine country ship disperse).
- **Customers** - your customers.

- **Customer Addresses** - addresses, that customers are using in their accounts.
- **Products** - your products.
- **Categories** - categories, where at least one product is assigned.

Each of this category contains a number of fields. There are four types of them:

- **Numerical fields** - can be used "as is", for example, IDs. There are two additional subtypes of numerical fields:
  - **Total [Field]** - calculates total value of the entire column.
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- **Group of [Field]** - non-numerical field, that can be used as filter.

Combine them to create a query, and block will display result, with automatic date clip.











## Note

You can combine fields from different categories - but for some reports some fields will return empty data. For example, categories **Orders**, **Customers**, **Order Items** are compatible, while **Products** and **Customers** are not.

We recommend to use fields from the same Category - it is enough for most reports.

Properly configured, our dashboards should look, as in [our demo](#):

- **Daily View dashboard**

-  DASHBOARD
-  SALES
-  PRODUCTS
-  CUSTOMERS
-  MARKETING
-  CONTENT
-  REPORTS
-  STORES
-  SYSTEM
-  FIND PARTNERS & EXTENSIONS

## Sales: Daily View ▾

REVENUE / 24H ⚙

**\$917.58** ▼ -16 %

Sep, 7 14:20 - Sep, 8 14:20

REVENUE / THIS WEEK

**\$6,893** ▲ 44 %

Sep, 3 - 9

REVENUE / THIS MONTH

**\$25,343** ▲ 345 %

Sep, 1 - 30

AOV ⚙

**\$184.72**











Sep, 8 2007 - Sep, 8 2027

RECENT ORDERS

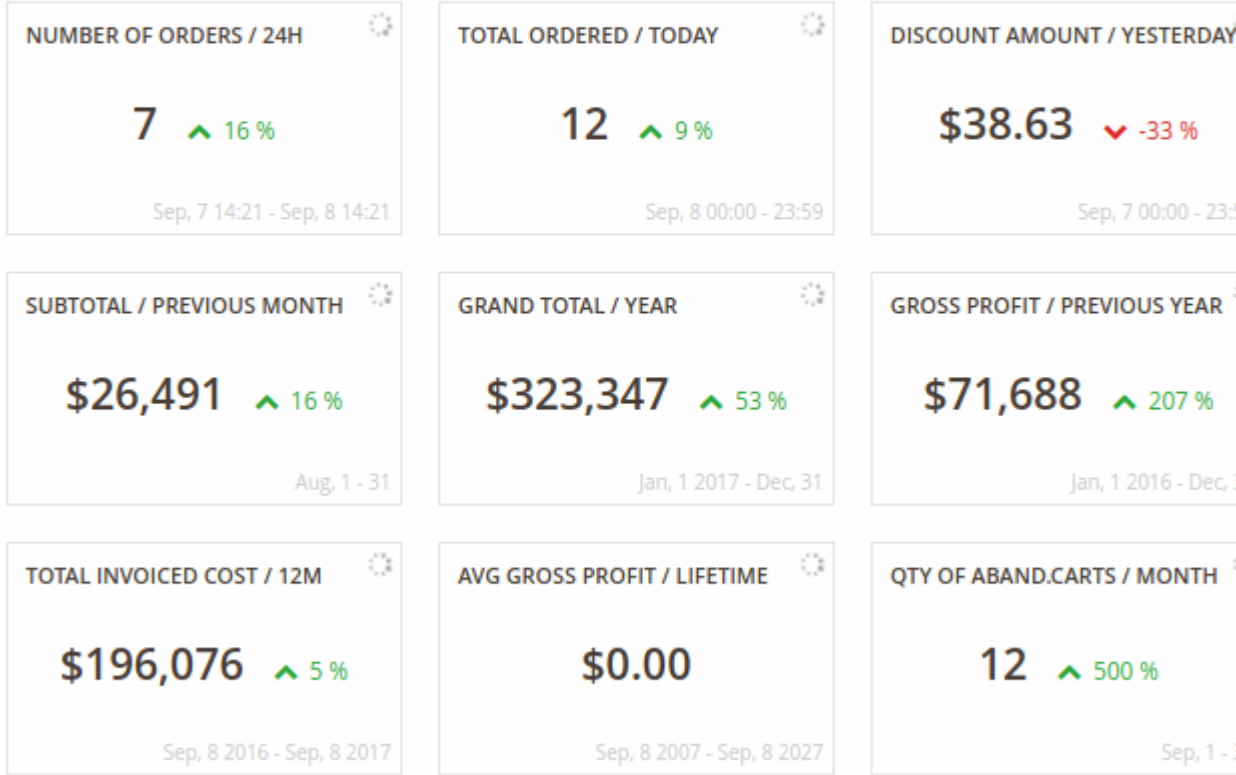
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- **All in One dashboard**



-  DASHBOARD
-  SALES
-  PRODUCTS
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## All in one ▾



## Filtering Data

Each block contains a **Filter** section, available both at creation stage, and on block editing. It is a table, which contains zero or more conditions, applied to general data. selected at **Metrics** section.

## Filter Conditions

Column	Operator
Total Discount	Gr

Each condition is represented by row with the following properties:

- **Column** - a raw data column, which is used for filtering. It can differ depending on Metrics data, but currently offer only numeric and text columns.
- **Operator** - is the comparison type. There are the following comparison operators available:
  - **Equal To** and **Not Equal To**
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### Note

**Warning:** If you had selected more than one condition, data shall fit them all like they were combined with **AND** operator.

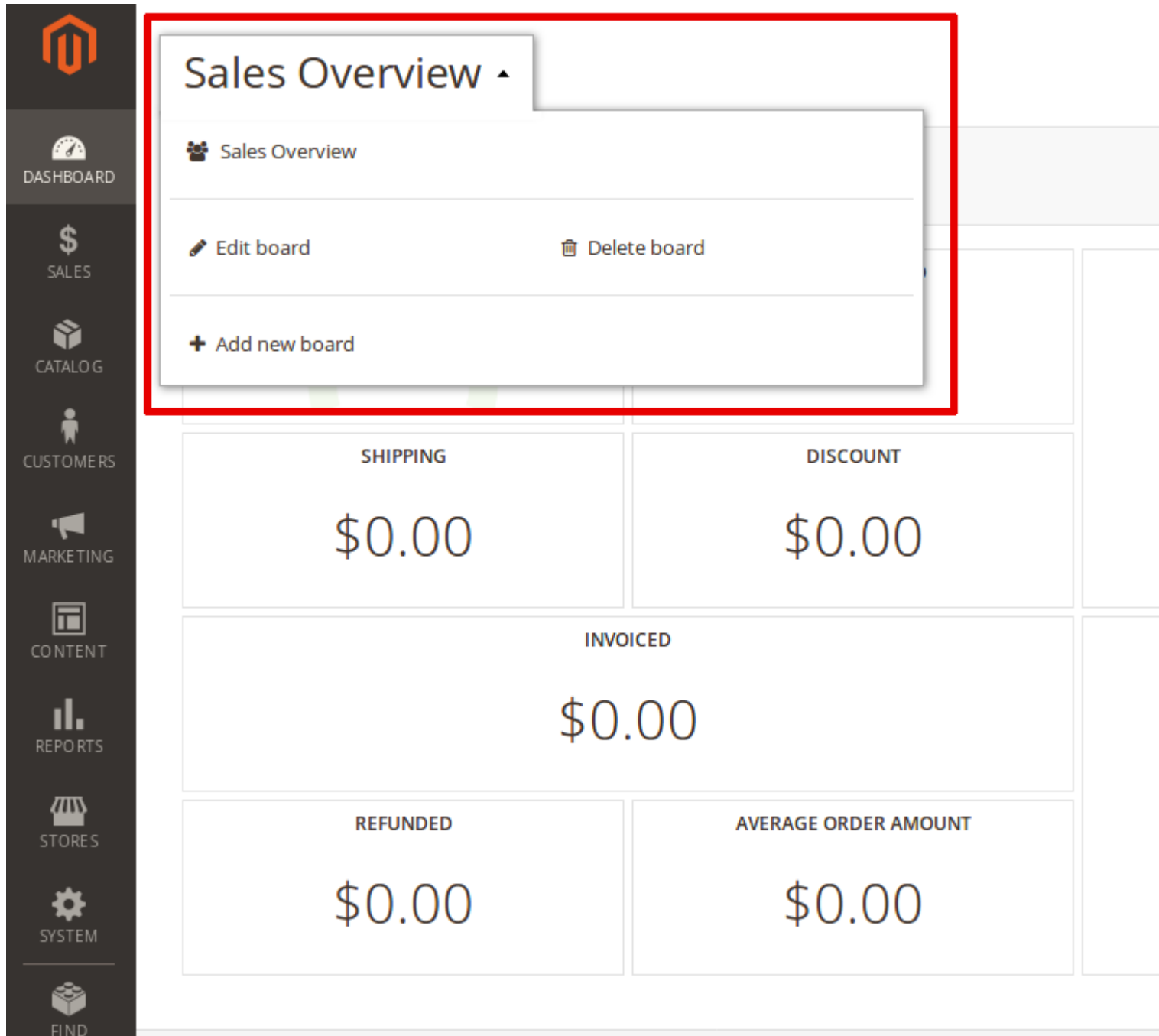
### Note

If you want to set a Magento dashboard as default, please go to **Store - Configuration - Advanced - Admin - Startup page** and set from drop-down list **Dashboard**.

=====

## Managing Dashboards

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It is divided into three sections:

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- **Enable Mobile Access** - whether newly-created Dashboard will be accessible in Mobile mode.

### Note

This mode is very convenient for accessing dashboard data, but has some warranties:

- Dashboard widgets editing mode is disabled.
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- Dashboard URL itself is highly encoded to limit the ability to remember/copy URLs by an unauthorized person.

Please note that there is **no other suitable protection** for the mobile dashboard. If you are not sure, do not enable this option.

Press **Save** to create your new Dashboard.

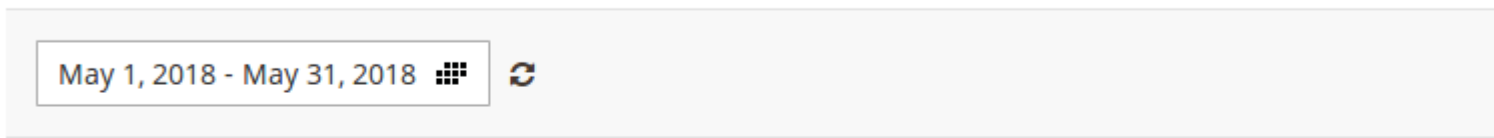
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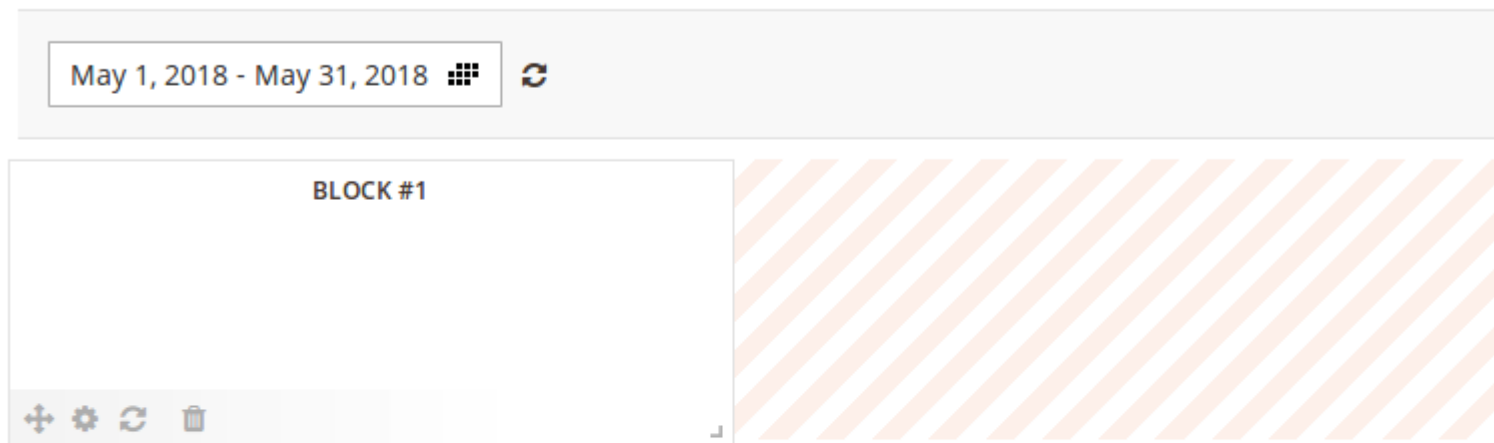
button, which is located in the right end of title ribbon:

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It will bring you to the Blocks Configuration mode, as shown below:

## My New Dashboard ▾



To add a block, press **Add Block** button on the title ribbon. It will create an empty block rectangle, as you can see on screenshot above.

This block has four buttons on its bottom pane:

- **Move** - allows you to move block visually on marked zone. You can also resize block, if you wish - just

drag and drop its right-bottom corner.

- **Settings** - allows you to select data, which will be displayed on that block (read more below).
- **Refresh** - allows you to preview (or refresh) previewed data in Edit Mode.

### Note

By default, each block is reloaded once a minute to ensure that the dashboard always contains up-to-date data

- **Delete** - removes block.

You can add to the block either statistical data, or tables. Press **Settings** button (second on the block button pane), and you will see Metrics Edit Panel:

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#### Time Range

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Override dashboard time

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As you see above, it contains of the following fields:

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Depending on **Block Type** parameter, you can also set additional visualization options.

If **Block Type** is **Single Value**, then you will see next options:

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If **Block Type** is **Table**, then will available the next options:

- **Dimensions** - select column that will be used for group the report.
- **Columns** - allows you to select, which columns should be displayed
- **Sorting** - choose sort order
- **Rows Limit** - allows to set limit for rows.

If **Block Type** is **Chart**, then will available the next options:

- **Dimension** - select column that will be used for group the report.
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## Selecting Metrics Data

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- **Categories** - categories, where at least one product is assigned.

Each of this category contains a number of fields. There are four types of them:

- **Numerical fields** - can be used "as is", for example, IDs. There are two additional subtypes of numerical fields:
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Combine them to create a query, and block will display result, with automatic date clip.

## Note











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We recommend to use fields from the same Category - it is enough for most reports.

Properly configured, our dashboards should look, as in [our demo](#):

- **Daily View dashboard**



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## Sales: Daily View ▾

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Sep, 1 - 30

AOV ⚙











**\$184.72**

Sep, 8 2007 - Sep, 8 2027

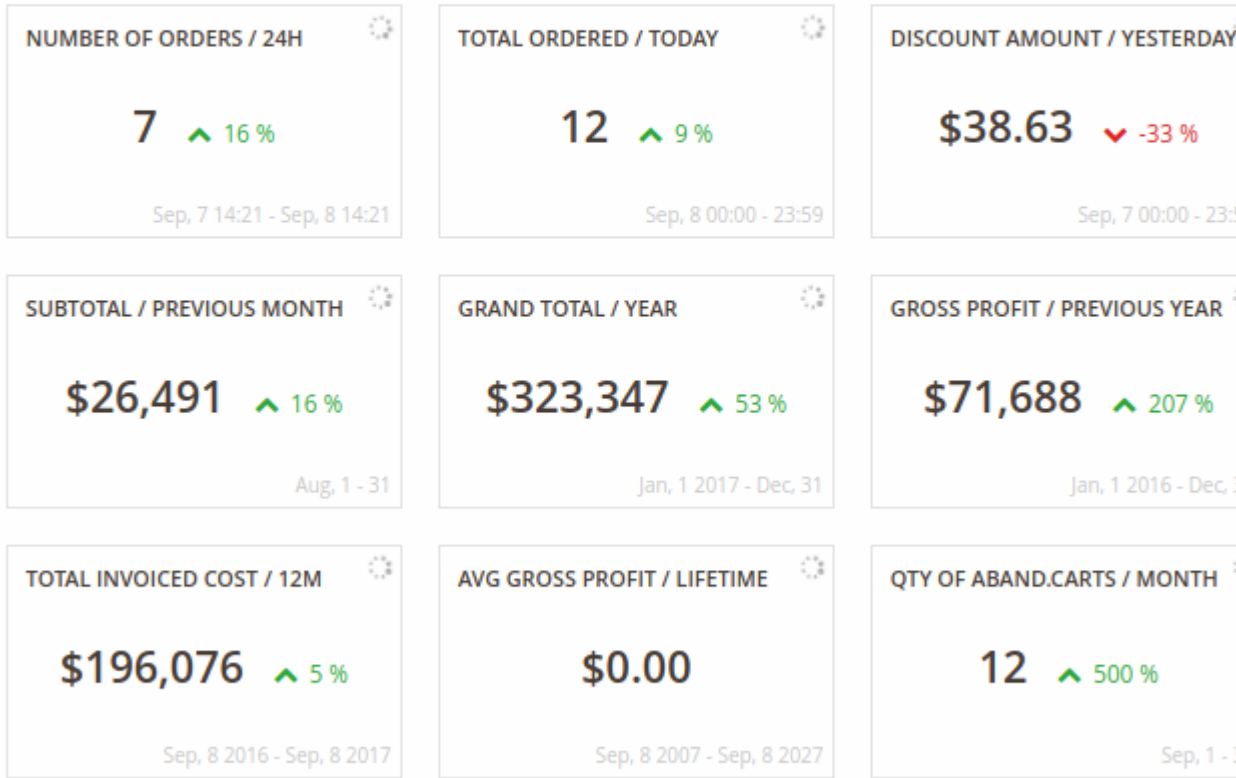
RECENT ORDERS

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- **All in One dashboard**

-  DASHBOARD
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## All in one ▾



## Filtering Data

Each block contains a **Filter** section, available both at creation stage, and on block editing. It is a table, which contains zero or more conditions, applied to general data. selected at **Metrics** section.

## Filter Conditions

Column	Operator
Total Discount	Gr

Each condition is represented by row with the following properties:

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**Warning:** If you had selected more than one condition, data shall fit them all like they were combined with **AND** operator.

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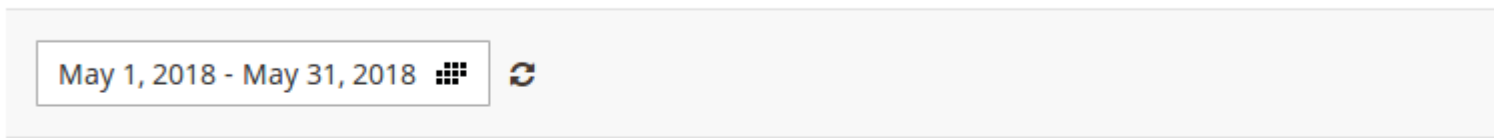
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#### **Note**

By default, each block is reloaded once a minute to ensure that the dashboard always contains up-to-date data

- **Delete** - removes block.

You can add to the block, either statistical data or tables. Press **Settings** button (second on the block button pane), and you will see Metrics Edit Panel:

---

## General

Title \*

Description

---

## Metrics

Data Source \*

Data \*

---

## Visualization

Renderer \*

For **Single Value** only data for first selected column is visible  
For **Table** only data from the same group is displayed

---

## Time Range

Override dashboard time  No

---

As you see above, it contains the following fields:

- **General Settings**
  - **Title** - a sensical title for a metric. It will be displayed as a title of your block.
  - **Description** - short description of your block.
- **Visualization**
  - **Renderer** - defines a view, in which data will be presented. There are two possible values:
    - **Single Value** - in this mode, only the first selected data field will be displayed.
    - **Table** - in this mode multiple fields can be displayed.

#### Note

Renderer also governs **Metrics** and **Reports** sections visibility.

- **Metrics** - defines data, used for calculations in current block. This section is shown when **Single Value** renderer is selected.
  - **Data Source** - application, from which data should be extracted. For now, it's only **Mirasvit Reports**.
  - **Data** - one or more fields (columns), which should be gathered and displayed. They will be explained [below](#).
- **Reports** - defines a report, which acts as a base for the current block. This section is shown when the **Table** renderer is selected.
  - **Report** - defines, which exactly Advanced shall be used.
  - **Columns** - allows you to select which columns should be displayed. It does not affect **Conditions** - since they applied before the block is rendered.

#### Note

In this field can be selected only columns, set as **Active** in corresponding Report. Read more about it [here](#).

- **Time Range**
  - **Override Dashboard Time** - by enabling this option, you can fix your block on a specific period. Otherwise, data on your block will be displayed according to the date range selected for the current Dashboard.

#### Note

Blocks with overridden time ranges are marked with special icon at the upper-right corner.

- **Range** - is a hidden field that appears only when **Override Time** mode is used. It allows you to pick up a range for which block should display data.
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- **Filter** - allows you to filter raw data, used by this block, with one or more filters. Read more about it [below](#).

Depending on **Renderer** parameter, you can also set additional visualization options.

If **Renderer** is **Single Value**, two possible visualization option available:

- **Gauge** - is the speedometer-like arc, which can be used for indicating dangerous levels (for example, refund amount). It has the following additional parameters:
  - **Is Active** - activates additional Gauge visualization.
  - **Min** - minimal value (left "green" bound of arc).

- **Max** - maximum value (right "red" bound of arc)
- **Spark Line** - is the curve line chart, which displays the dynamics of the selected value by dates. If you had selected **Compare To** option in **Time Range** section, there would be two curve outlines - one for current data, and second for comparison.
  - **Is Active** - activates additional Spark Line visualization.

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The selection of Metrics data is a little tricky. Field **Data** in Metrics Edit Pane contains all available fields in the selected category. There are the following Categories:

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


Metrics 

Data Source \* Mirasvit Reports

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- **Daily View dashboard**

-  DASHBOARD
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## Sales: Daily View ▾

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**\$917.58** ▼ -16 %

Sep, 7 14:20 - Sep, 8 14:20

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Sep, 3 - 9

REVENUE / THIS MONTH

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Sep, 1 - 30

AOV ⚙

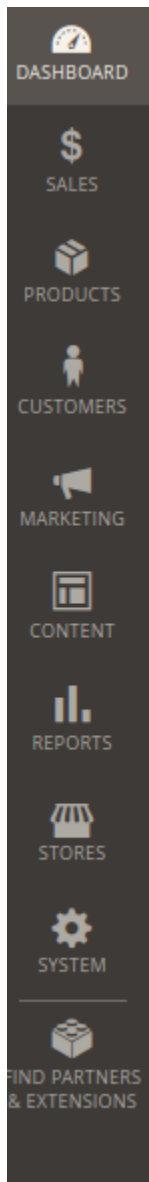
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Sep, 8 2007 - Sep, 8 2027

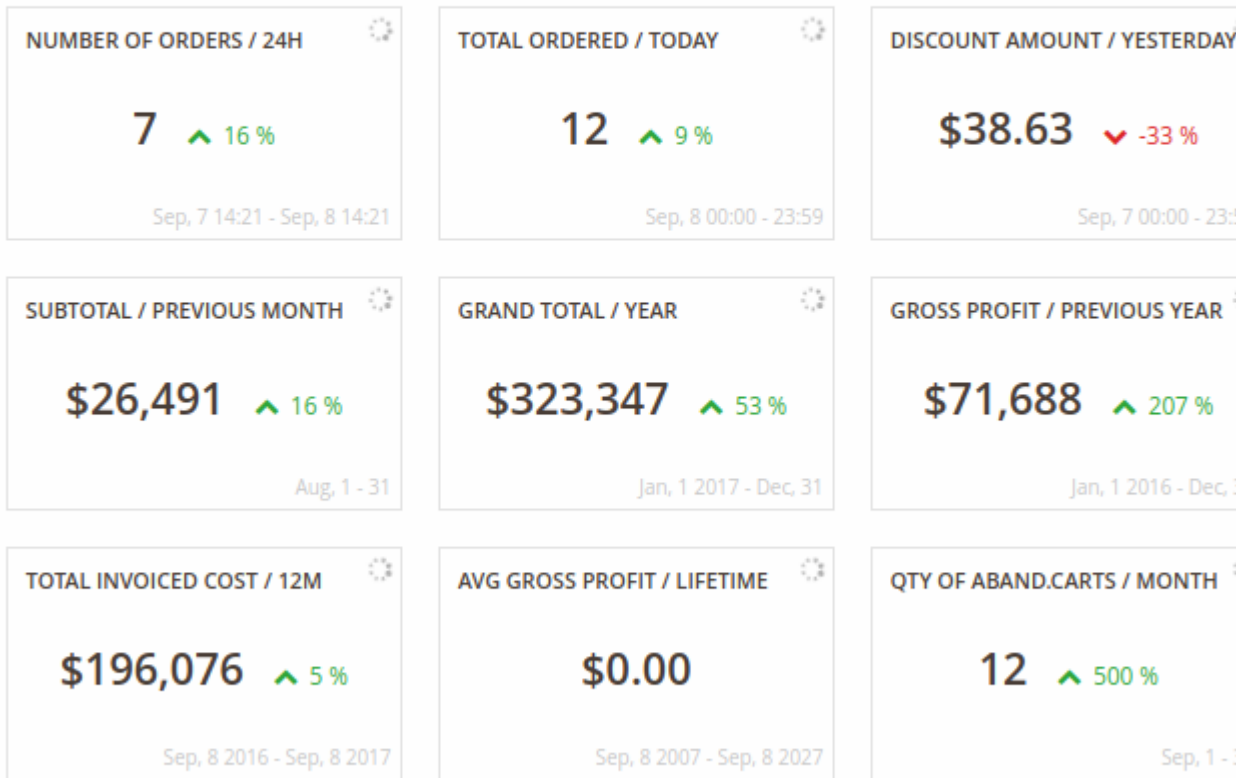
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- **All in One dashboard**



## All in one ▾



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Column	Operator
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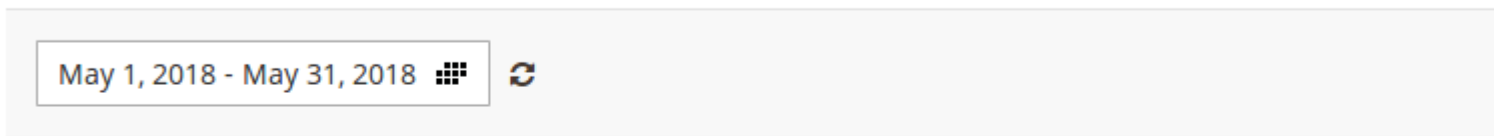
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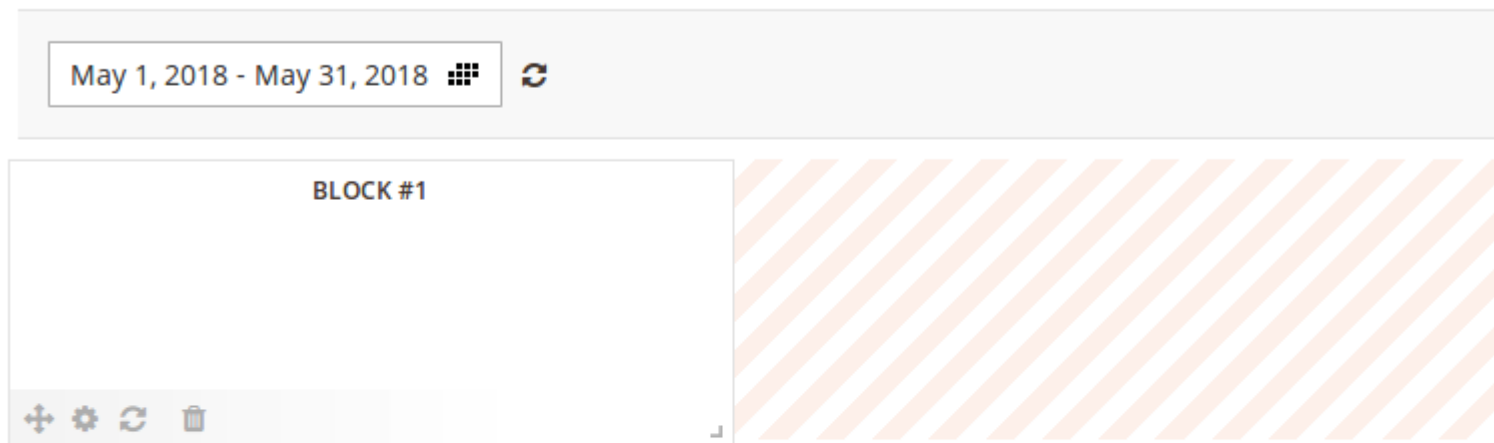
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Title \*

Description

---

## Metrics

Data Source \*

Data \*

---

## Visualization

Renderer \*

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---

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Override dashboard time  No

---

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


Metrics 

Data Source \* Mirasvit Reports

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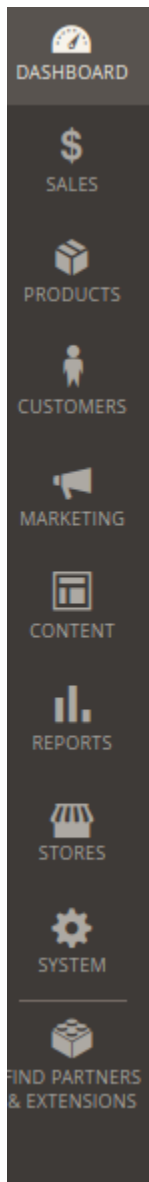
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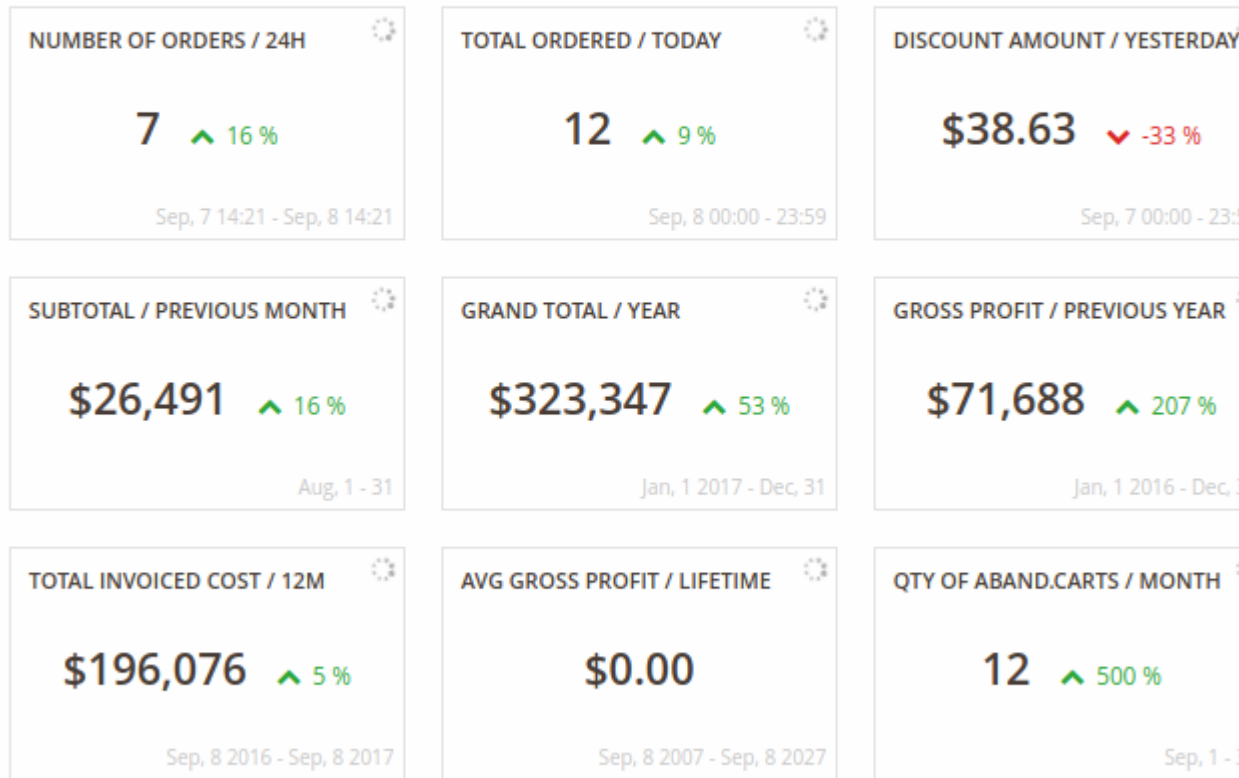
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- **All in One dashboard**



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May 1, 2018 - May 31, 2018  

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


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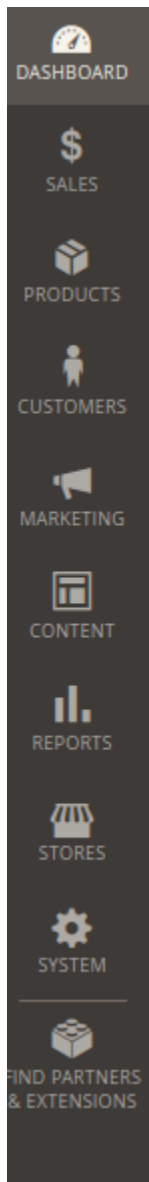
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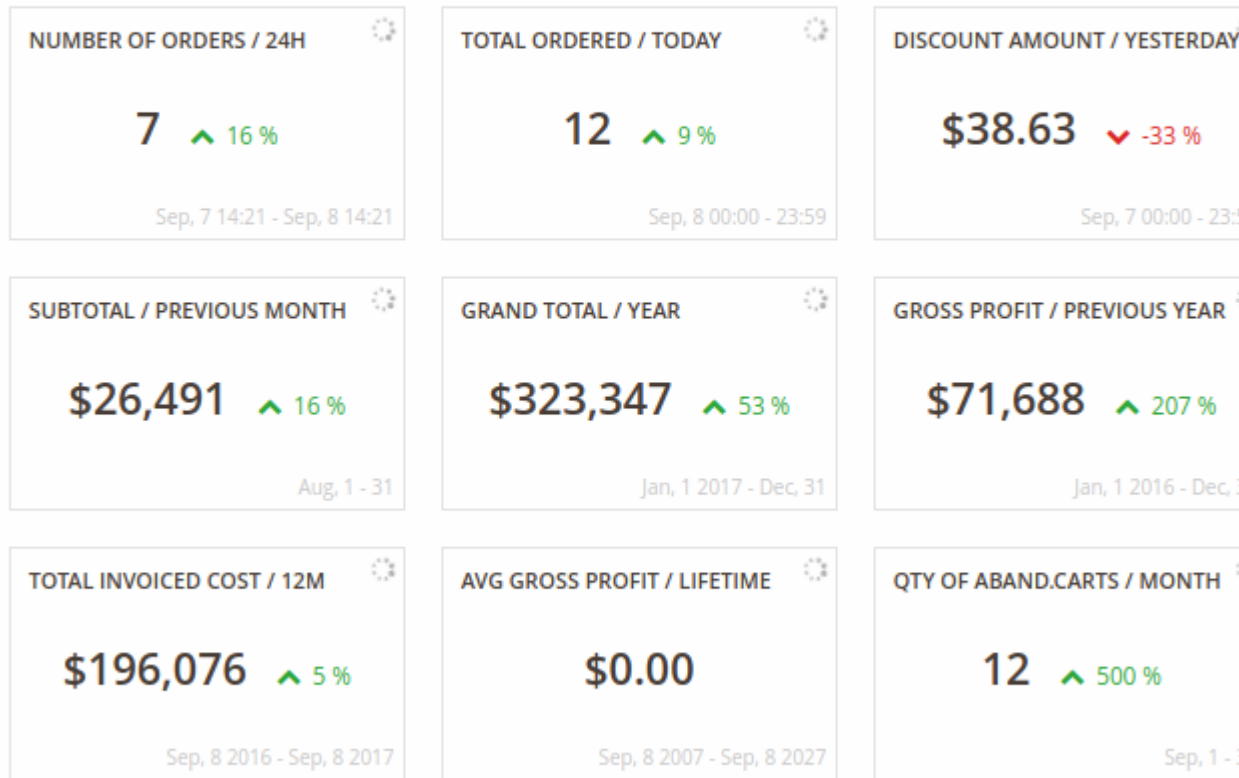
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## Change Log

### 1.3.1

(2022-05-10)

## Improvements

- switch to declarative schema
- 

## 1.2.49

(2021-05-13)

### Fixed

- onArray on null caused by changing the widget type from any to the "table" in the widget's settings
- 

## 1.2.46

(2020-09-07)

### Fixed

- Error notification when changing of dashboard's block are not allowed for current user.
- 

## 1.2.45

(2020-08-26)

### Fixed

- Issue with displaying dashboard due fast js initialization
  - info about boards with private type
- 

## 1.2.44

(2020-08-13)

### Fixed

- Mobile Dashboard overlay issue
- 

## 1.2.43

*(2020-07-29)*

### **Improvements**

- Support of Magento 2.4

### **Fixed**

- info about boards with private type
- 

## **1.2.42**

*(2020-02-04)*

### **Fixed**

- Timeranges for dashboard blocks in the email notifications

### **Improvement**

- PHPStan
- 

## **1.2.41**

*(2019-08-08)*

### **Fixed**

- EQP
- 

## **1.2.40**

*(2019-03-25)*

### **Fixed**

- Error after update to new version during setup command
- 

## **1.2.39**

*(2019-03-06)*



## **Fixed**

- Issue with comparison (last year)
- 

## **1.2.38**

*(2019-02-25)*

## **Fixed**

- Issue with overwrite dates
- 

## **1.2.37**

*(2019-01-31)*

## **Improvements**

- Added comparison percent to email reports
- 

## **1.2.36**

*(2019-01-30)*

## **Improvements**

- Comparison values to email reports
- 

## **1.2.35**

*(2018-12-27)*

## **Fixed**

- Issue with metrics comparison
- 

## **1.2.34**

*(2018-12-18)*

## **Fixed**

- Issue with email
- 

## **1.2.33**

*(2018-12-17)*

## **Improvements**

- Charts block
- 

## **1.2.32**

*(2018-12-11)*

## **Fixed**

- Issue with email reports filters
- 

## **1.2.31**

*(2018-12-06)*

## **Fixed**

- Issue with select wrong dashboard for mobile view
- 

## **1.2.30**

*(2018-12-04)*

## **Improvements**

- DateRange & Comparison

## **Fixed**

- Override date range
-

## 1.2.29

*(2018-11-30)*

### Fixed

- API
- 

## 1.2.28

*(2018-11-29)*

### Improvements

- Major updates in UI

### Fixed

- Compatibility with Magento 2.3
  - Issue with Secret Key in Request url
  - API
  - Issue with table filtration
- 

## 1.2.25

*(2018-10-12)*

### Fixed

- Widget setting changes are not applied after saving
- 

## 1.2.24

*(2018-10-10)*

### Improvements

- Add like/not like conditions to widget settings
- 

## 1.2.23

*(2018-10-02)*

**Fixed**

- Dashboard is not visible on mobile device
- 

## **1.2.22**

*(2018-09-11)*

**Fixed**

- Issue with reset recent changes
- 

## **1.2.21**

*(2018-09-10)*

**Improvements**

- Changed widgets position logic
- 

## **1.2.20**

*(2018-08-15)*

**Fixed**

- Cannot remove single dashboard
- 

## **1.2.19**

*(2018-07-26)*

**Fixed**

- Metrics do not correctly show values for today/yesterday dates
- 

## **1.2.18**

(2018-07-25)

### **Fixed**

- Dashboard blocks with table renderer are not sent via emails

### **Improvements**

- Add table renderer for dashboard block email
- 

## **1.2.17**

(2018-07-24)

### **Fixed**

- Filter records by correct date column
  - Wrong operator name for 'Is not one of' option in the dashboard block's filters
- 

## **1.2.16**

(2018-06-22)

### **Fixed**

- Area code is not defined during installation
- 

## **1.2.15**

(2018-06-19)

### **Improvements**

- Display only active report's columns
- 

## **1.2.14**

(2018-06-15)

### **Fixed**

- Empty metric's data when editing old widgets

---

## 1.2.13

(2018-06-14)

### Fixed

- Block settings are not shown: explicitly specify the component type option
- 

## 1.2.12

(2018-06-14)

### Features

- Filter and grid settings for dashboard blocks
- Add block level date comparison
- Different data depending on selected renderer

### Improvements

- Second spark line for comparison
  - Time icon for time-overridden blocks
  - Persist previously selected report's columns for dashboard block
- 

## 1.2.11

(2018-05-02)

### Improvements

- Automatically update dashboard blocks every 2 minutes

### Fixed

- Cannot create dashboard block
- 

## 1.2.10

(2018-04-17)

### Fixed

- Error opening dashboard
- 

## 1.2.9

*(2018-04-16)*

### Fixed

- Dashboard compatibility with Magento 2.1
- 

## 1.2.8

*(2018-04-10)*

### Fixed

- 'False' is displayed for option group instead of a table name at dashboard 'Data' field
- 

## 1.2.7

*(2018-04-04)*

### Fixed

- Error viewing dashboard, created\_at and updated\_at fields cannot be null
- 

## 1.2.6

*(2018-03-30)*

### Fixed

- Dashboard blocks of type 'table' are not displayed
  - Do not ask to login when using QR code to look at the mobile dashboard
- 

## 1.2.5

*(2018-03-20)*

### Fixed

- Dashboard does not show information for one day date range
- 

## 1.2.4

*(2018-03-16)*

### Fixed

- Problems with date interval on dashboard toolbar
- 

## 1.2.3

*(2018-03-07)*

### Fixed

- issue with dates
- 

## 1.2.2

*(2018-03-05)*

### Fixed

- Attempt to change or create new dashboard gives an error
- 

## 1.2.1

*(2018-02-13)*

### Fixed

- issue with asArray method
- 

## 1.2.0

*(2018-02-05)*

### Improvements

- New version with many changes



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## **1.0.18**

*(2017-12-06)*

### **Fixed**

- Fixed an issue with Dashboard controller
- 

## **1.0.17**

*(2017-11-07)*

### **Improvements**

- Added the ability to create widgets for individual Store Views
- 

## **1.0.16**

*(2017-10-03)*

### **Fixed**

- Compatibility with Magento 2.1.9
- 

## **1.0.15**

*(2017-08-22)*

### **Improvements**

- Added abandoned cart metrics to "Metric" widgets
- 

## **1.0.14**

*(2017-08-07)*

### **Improvements**

- Added support of Cart Reports widgets
- 

## **1.0.13**

(2017-07-27)

## **Improvements**

- Added the ability to create "metrics" widgets for specific customer groups

## **Fixed**

- Fixed formatting "price" type values in "Report" widgets
- 

## **1.0.11**

(2017-06-07)

## **Fixed**

- Issue with widget edit
- 

## **1.0.10**

(2017-06-07)

## **Improvements**

- Added an individual filter by order statuses to "metric" widgets
- 

## **1.0.8**

(2017-06-06)

## **Fixed**

- Fixed display of product names in dashboard widgets
- Fixed an issue with filter by order statuses for "report" widgets

## **Improvements**

- Applied the configuration "Process Orders" for metric widgets
- 

## **1.0.7**

(2017-05-12)

## **Fixed**

- Fixed an issue with using of attribute ID instead of the attribute label in the "Report" widget
- 

## **1.0.6**

*(2017-04-18)*

## **Fixed**

- Fixed the issue with blank widgets in email notifications
- 

## **1.0.5**

*(2017-04-13)*

## **Fixed**

- Solved an issue with duplication of rows in "Report" widgets
- 

## **1.0.4**

*(2017-04-05)*

## **Fixed**

- Solved an issue with exception "No such widget"
- 

## **1.0.3**

*(2017-04-05)*

## **Features**

- Ordered columns in the list in configuration of Report widget

## **Improvements**

- Added initialization spinner to dashboard
- 

## **1.0.2**

*(2017-03-31)*

## **Improvements**

- Mobile dashboard

## **Fixed**

- [#3] -- error after removing widget
- 

## **1.0.1**

*(2017-02-20)*

## **Features**

- Improved list of metrics in dropdown

## **Fixed**

- Added widget types to widget Form
  - Minor issues with js
  - Fixed an issue with widgets saving
  - Issue with menu
- 

## **1.0.0**

*(2017-01-31)*

## **Improvements**

- Initial release
-