io-base
value-added data

TERĒGA
SOLUTIONS

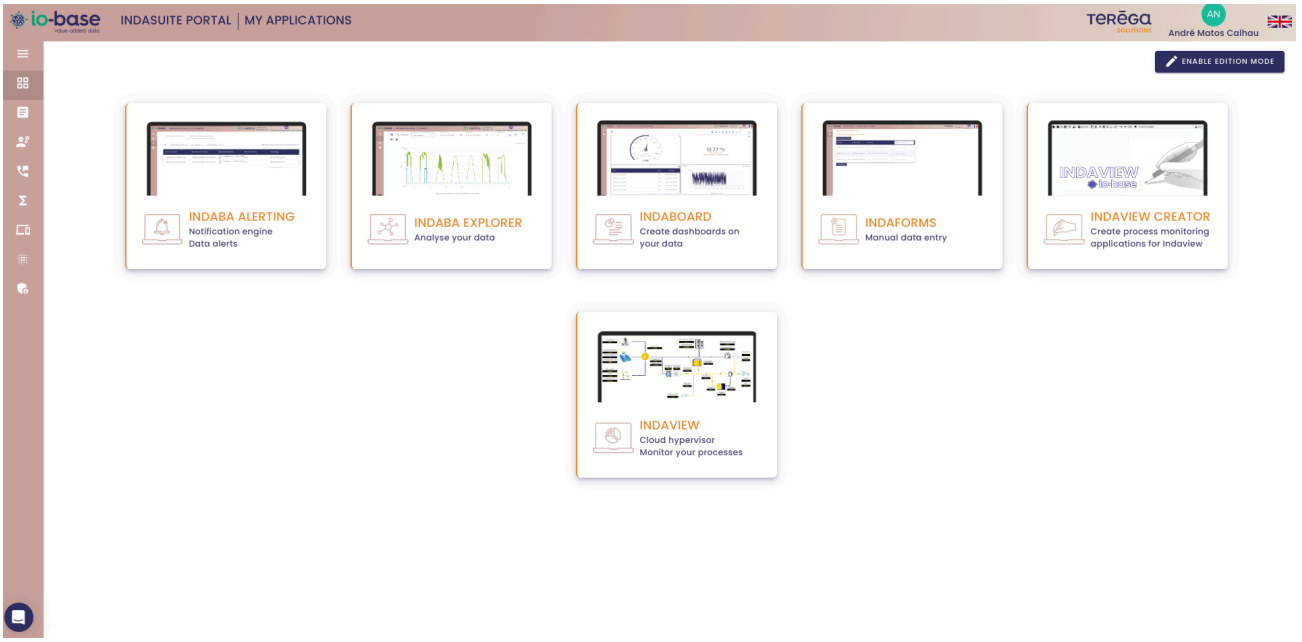
IndaBoard

User documentation

Content

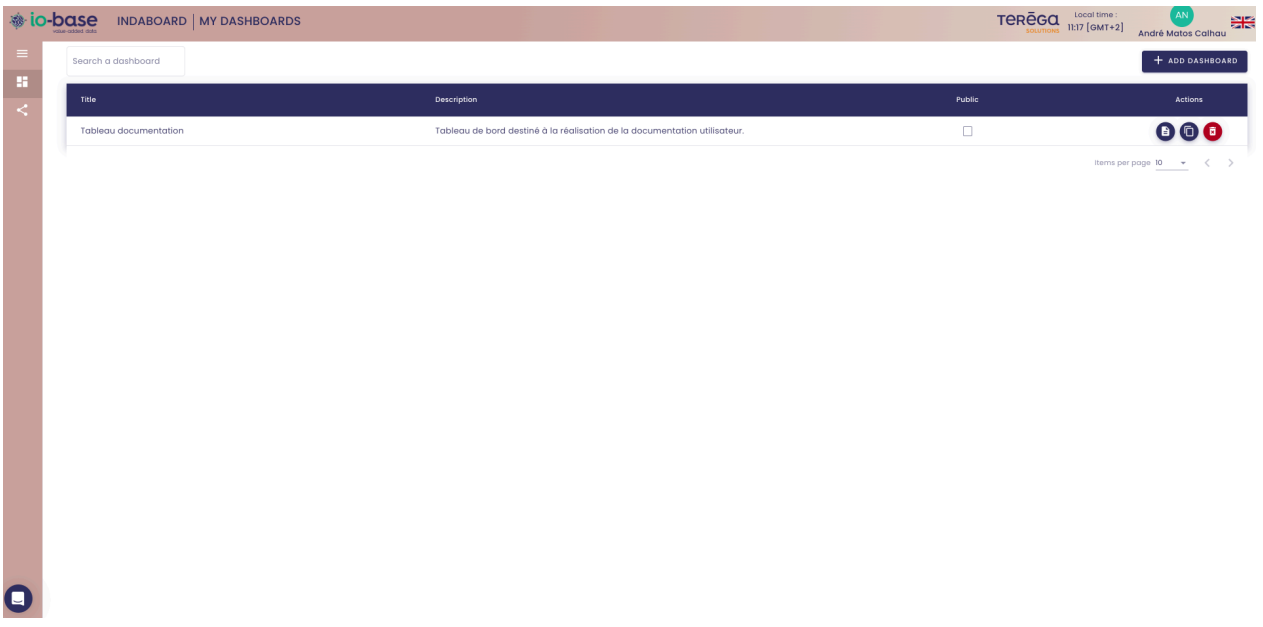
1. Introduction

Connect to the IO-Base portal.



Click on the **IndaBoard** tile.

The application opens in a new tab, entitled **My Dashboards**.

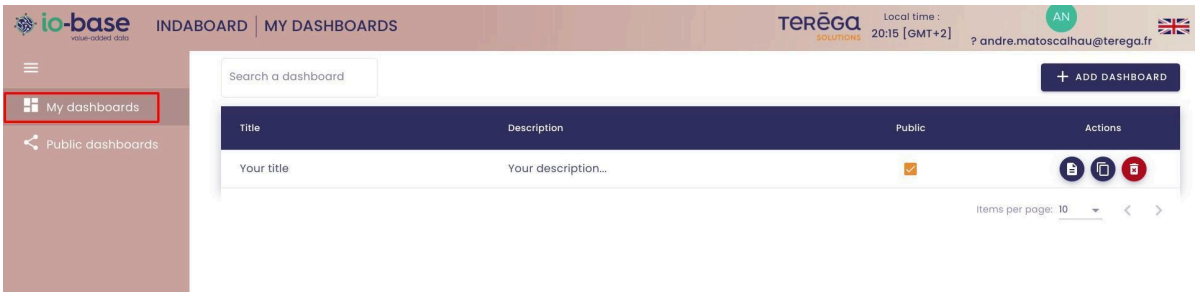


2. Dashboards

2.1. Managing my dashboards

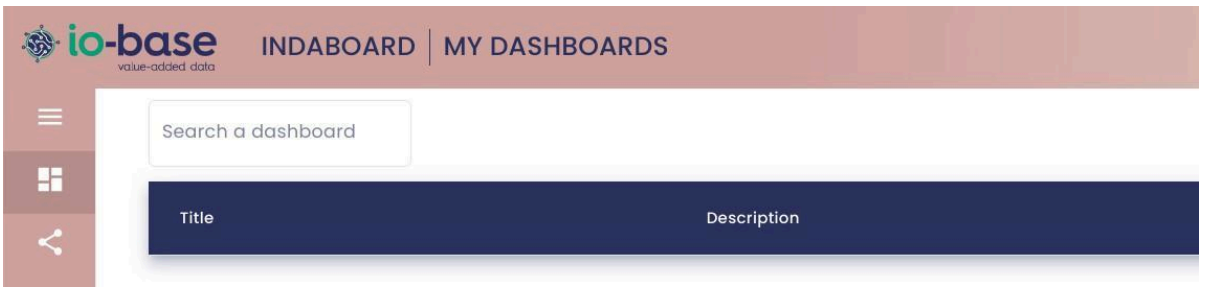
Access IndaBoard by connecting to the **IO-Base** portal.

On the left-hand side of the screen, a link allows you to have access to your dashboards: My dashboards.



This screen displays all of the dashboards you have created. Only you can view the dashboards.

A search area allows you to filter the table, to make it easier for you to find the dashboards you are looking for.



From that screen, you can manage your dashboards:

- create a new dashboard
- view a dashboard (you can also edit it)
- duplicate a dashboard

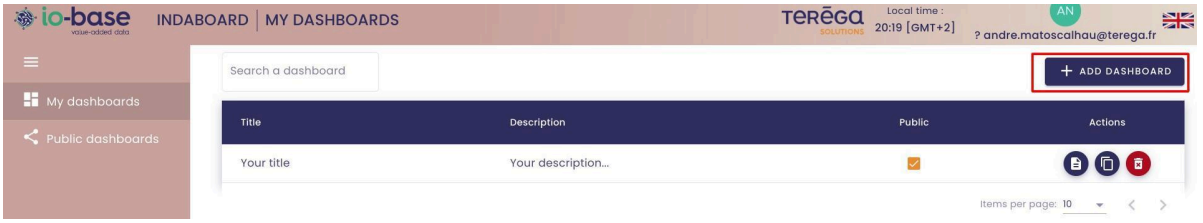
- delete a dashboard

View, duplicate and delete actions are accessible from the **Actions** column.

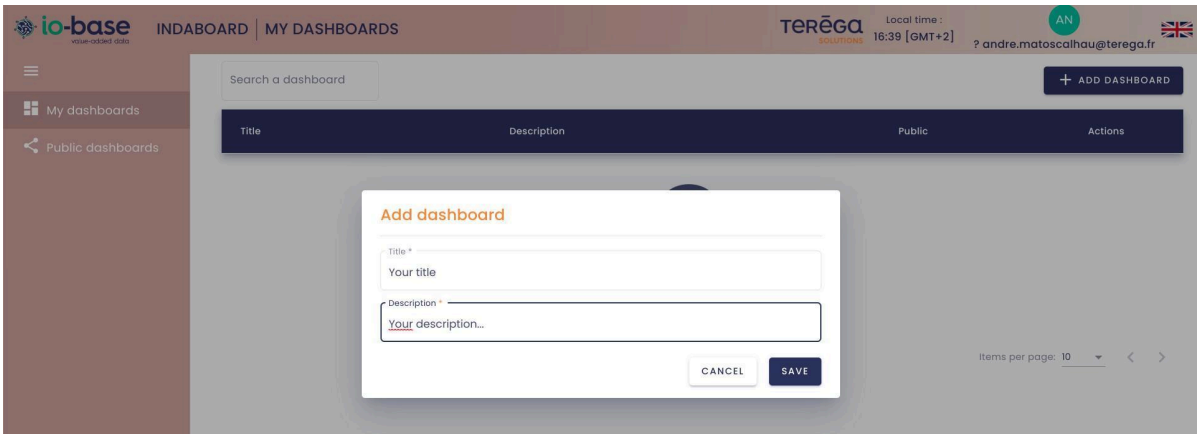
2.2. Create a dashboard

Access **IndaBoard** by connecting to the **IO-base** Portal.

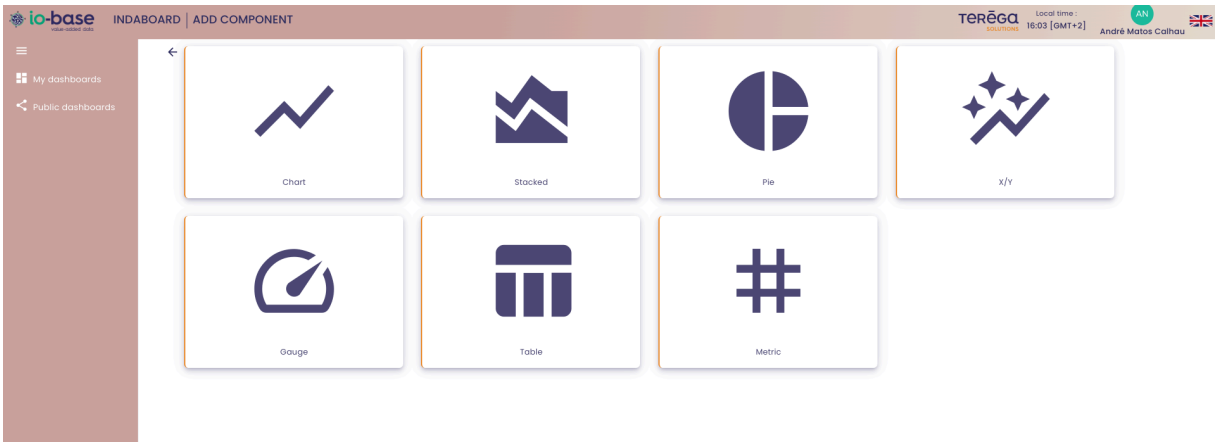
Click on **Add Dashboard** from the My Dashboards menu.



A window appears, allowing you to enter a **Title** and a **Description**.
Enter the desired values, then click on **Save**.

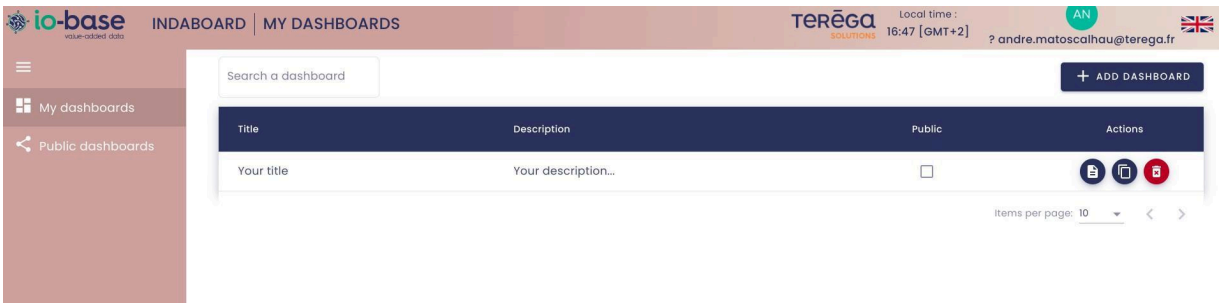


The dashboard is created. You are redirected to the component creation screen.



Note : for further information about the creation of a component, please refer to the dedicated article.

Once it is created, the dashboard appears in the **My Dashboards** menu.

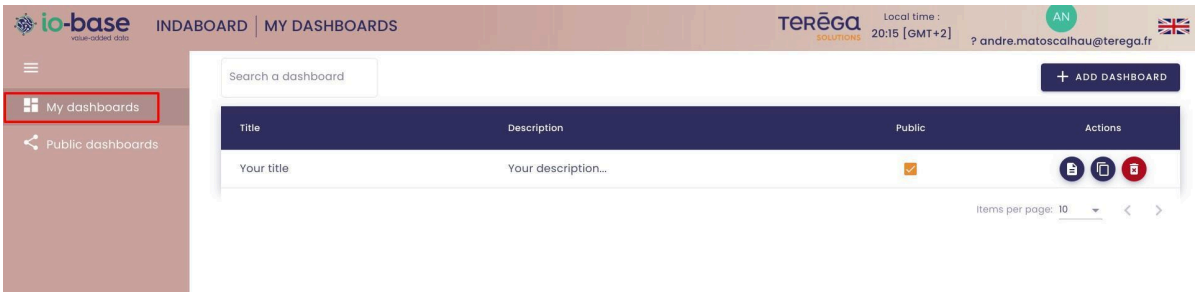


2.3 Public dashboards

If you want other users to view your dashboards, you can make them public.

2.3.1 Making a dashboard public

From IndaBoard, access your dashboards by clicking on the **My Dashboards** menu.



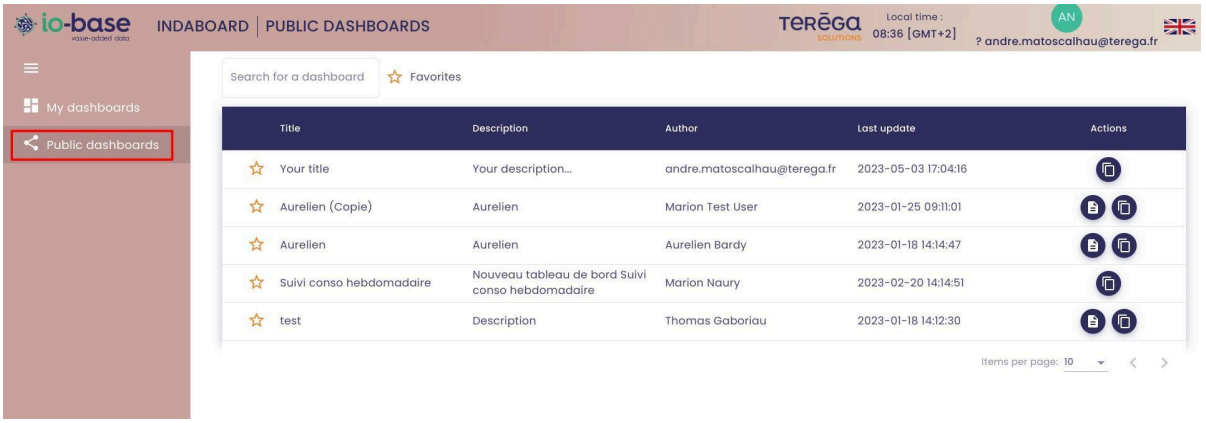
Your dashboards' list appears. It contains a column entitled **Public**.

By checking the **Public** box of a dashboard, you make it visible to other users within your IO-base environment.

Note : Other users are able to view your dashboards, but cannot modify or delete them.

2.3.2 Access the list of public dashboards

Public dashboards are available from the IndaBoard menu, **Public Dashboards**.



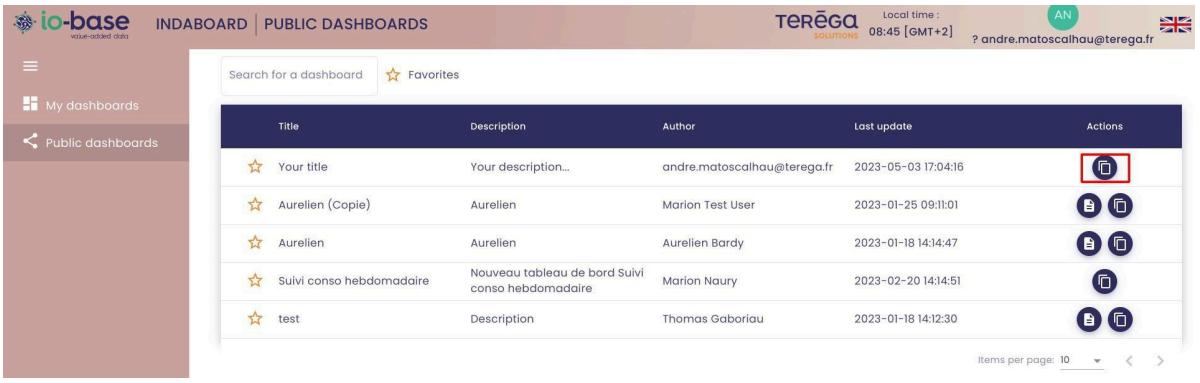
By clicking on the **View** icon in the **Actions** column, you can view any publicly available dashboard.

Note : You can only edit public dashboards that you have created.

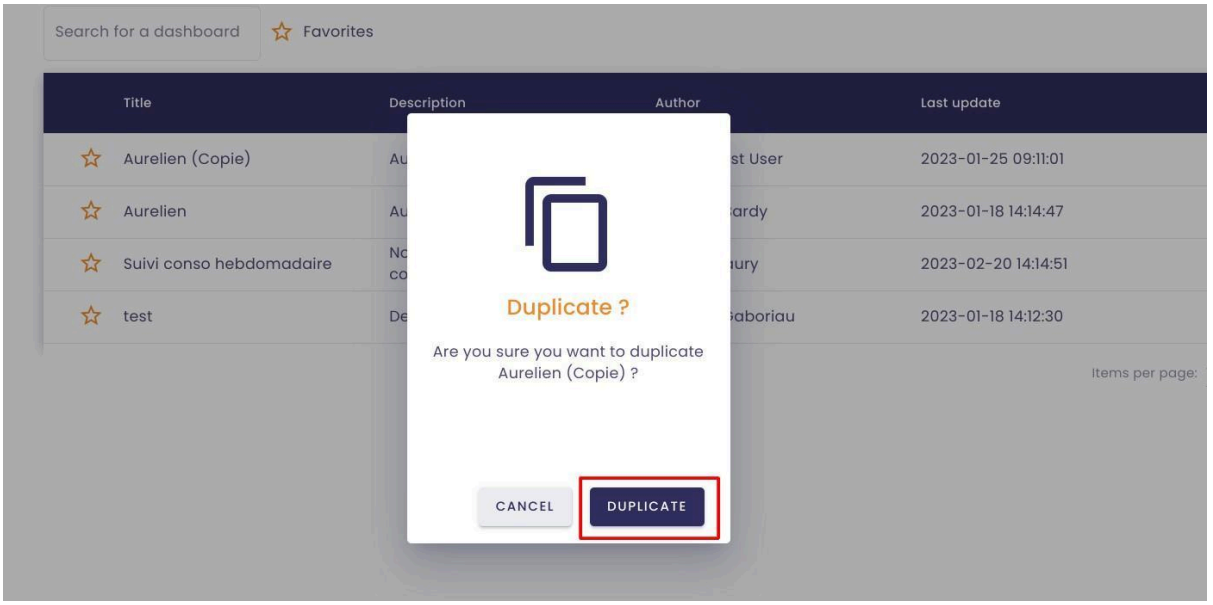
Note : If you try to view a dashboard displaying metrics for which you have not read rights, the components will not report any data.

2.3.3 Duplicate a public dashboard

You can duplicate a public dashboard of which you are not the author. Use the Duplicate button in the **Actions** column.



In the confirmation window, click on **Duplicate** to confirm.



The dashboard is now duplicated. You can edit the copy. It appears on the list of your dashboards, and by default, it is not public.

Note : From the list of public dashboards, you can choose to bookmark dashboards, in order to filter the table more quickly.

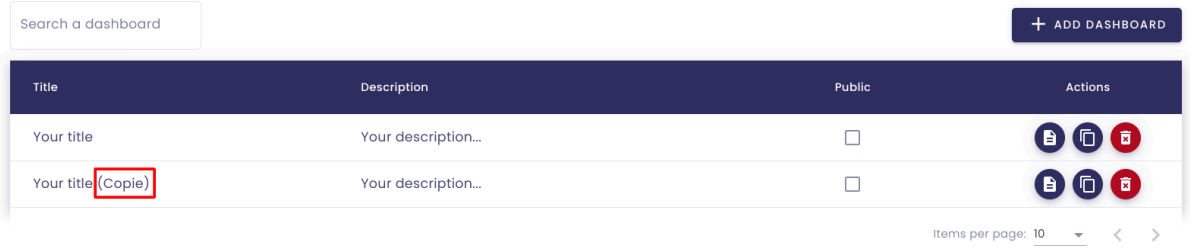
2.4. Duplicate a dashboard

Access **IndaBoard**, by connecting to the IO-base portal.

From the **My Dashboards** page, it is possible to duplicate a dashboard by using the button available in the **Actions** column.

When you click on the **Duplicate** button, a confirmation window appears. Click on **Duplicate** to confirm.

The dashboard and all its components are duplicated. The dashboard has the same name as the original one, prefixed with **Copy of**.



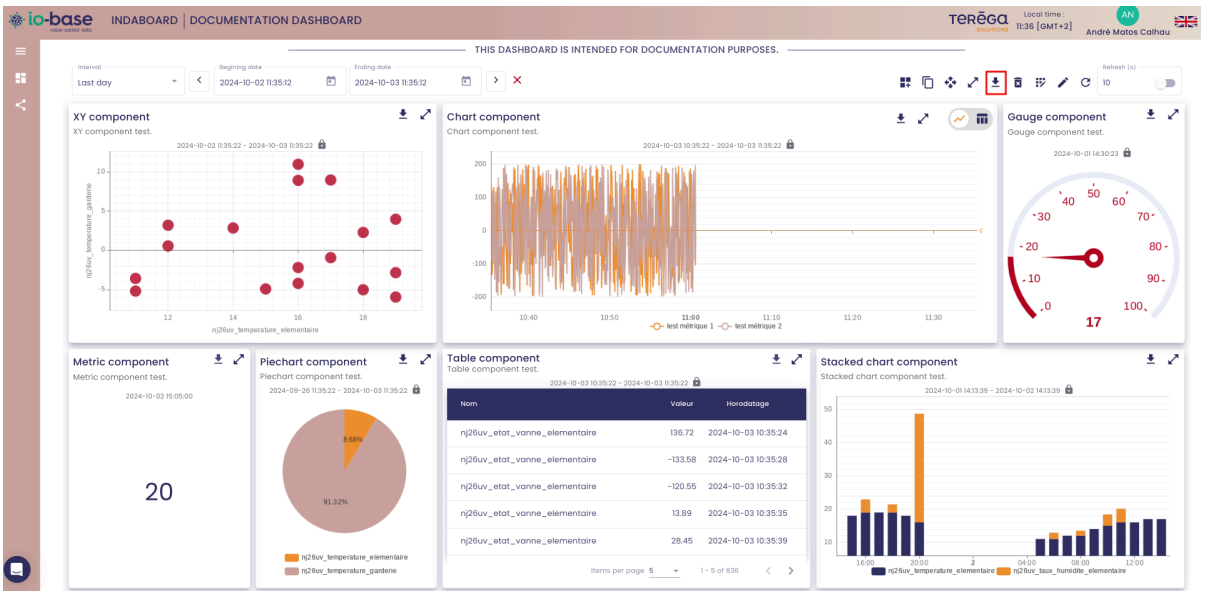
Note : To change the name of the dashboard, display it and then click on the button at the top right to modify it.

2.5. Exporting a dashboard

From the **io-base** portal, connect to **IndaBoard**.
Through the **My Dashboards** menu, view a dashboard from the list.

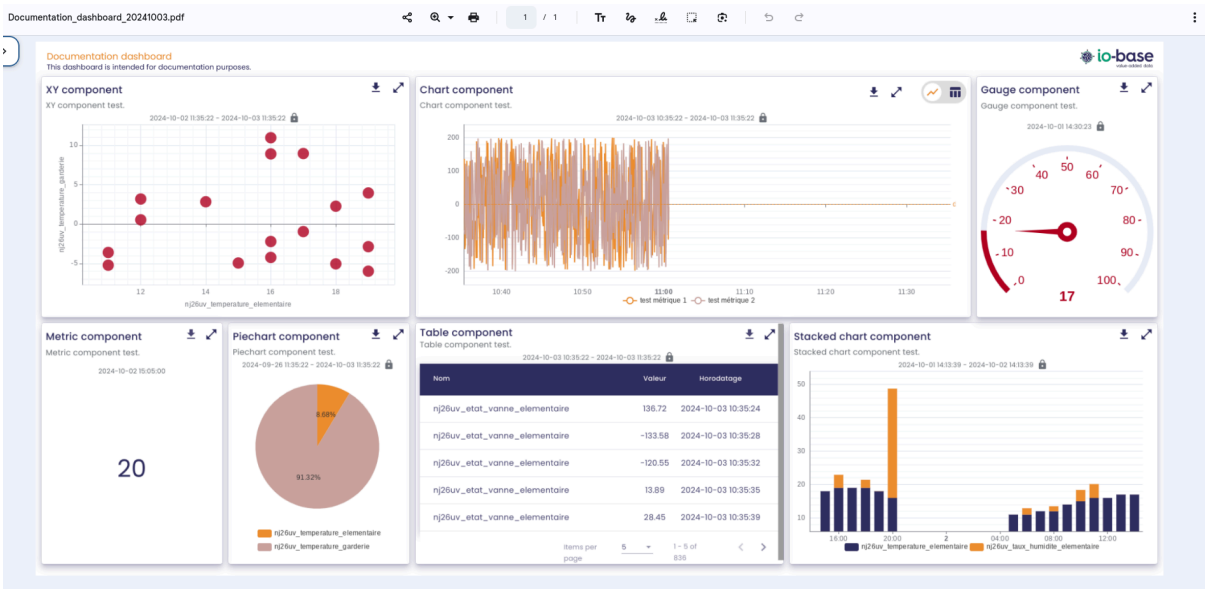
2.5.1 Export of a complete dashboard

In the top right menu, click on the button to download the dashboard :



Note : your browser must allow pop-ups.

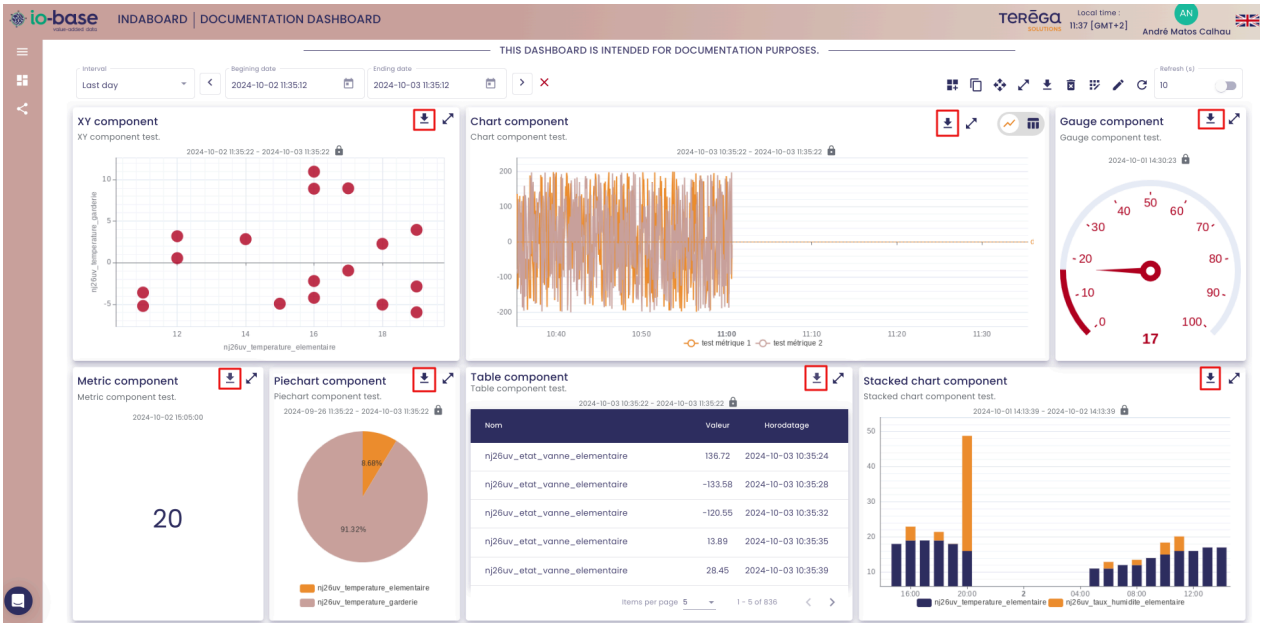
The download begins, and your dashboard is saved in PDF format.



Note : Each component can also be exported independently in image format.

2.5.2 Export of a single component

From the report viewing screen, each of the components has a button to export them in image format. The button is located at the top right corner :



By clicking on the button, the image of the component is downloaded in PNG format.

Note : your browser must allow pop-ups.

2.6. Managing dates on a dashboard

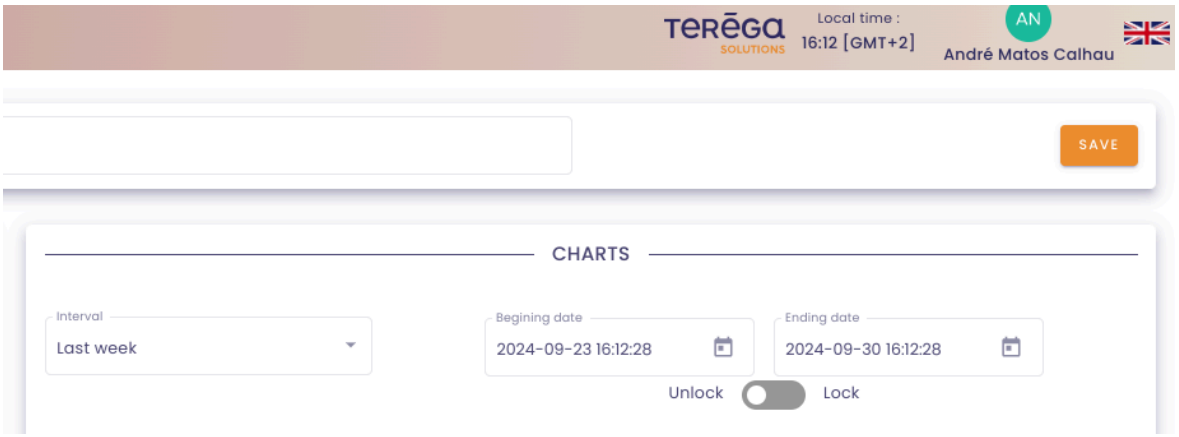
Prerequisites : from the **Io-base** portal, access to **Indaboard**.

Through the menu **My Dashboards**, view a dashboard's content.

2.6.1 Functioning of the dates

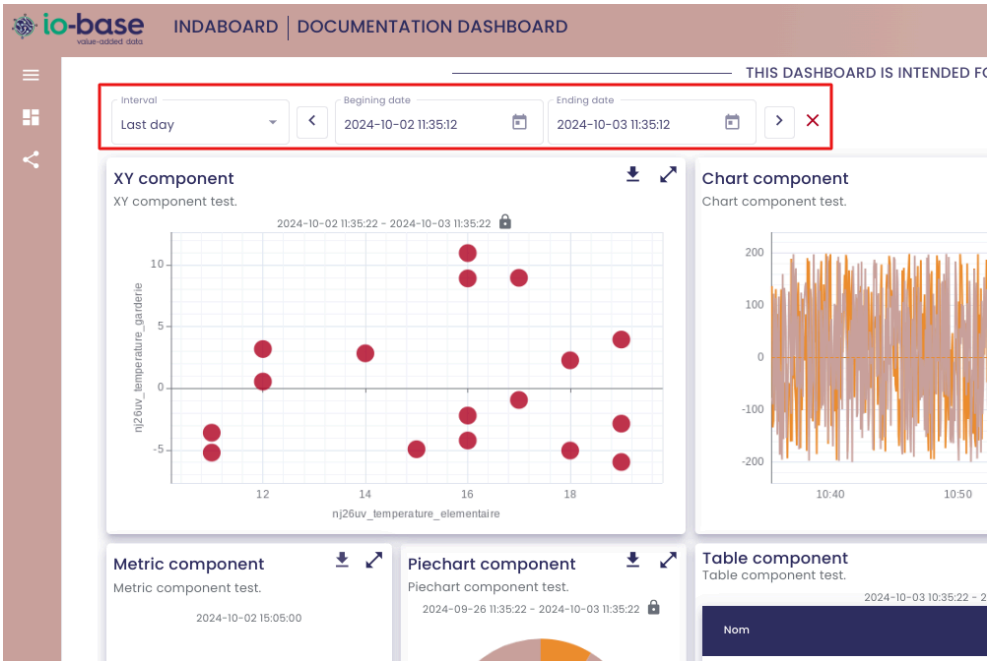
2.6.1.1 Specific period for each component

In a dashboard, each component can be set up for its own period. For example, the first one can correspond to the data of the last day, and the second one to the data of the last month. These dates can be set in the modification screen of each component.

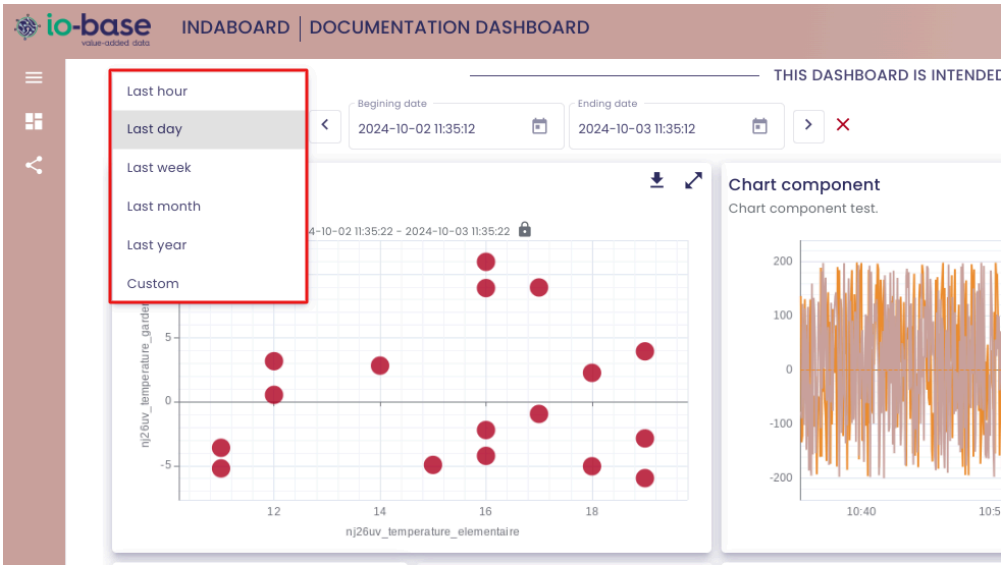


2.6.1.2 Common period for all components

It is also possible to define a period that will be common to all the components of a dashboard. In the dashboard settings screen, click on the calendar icon in the upper left-hand corner.

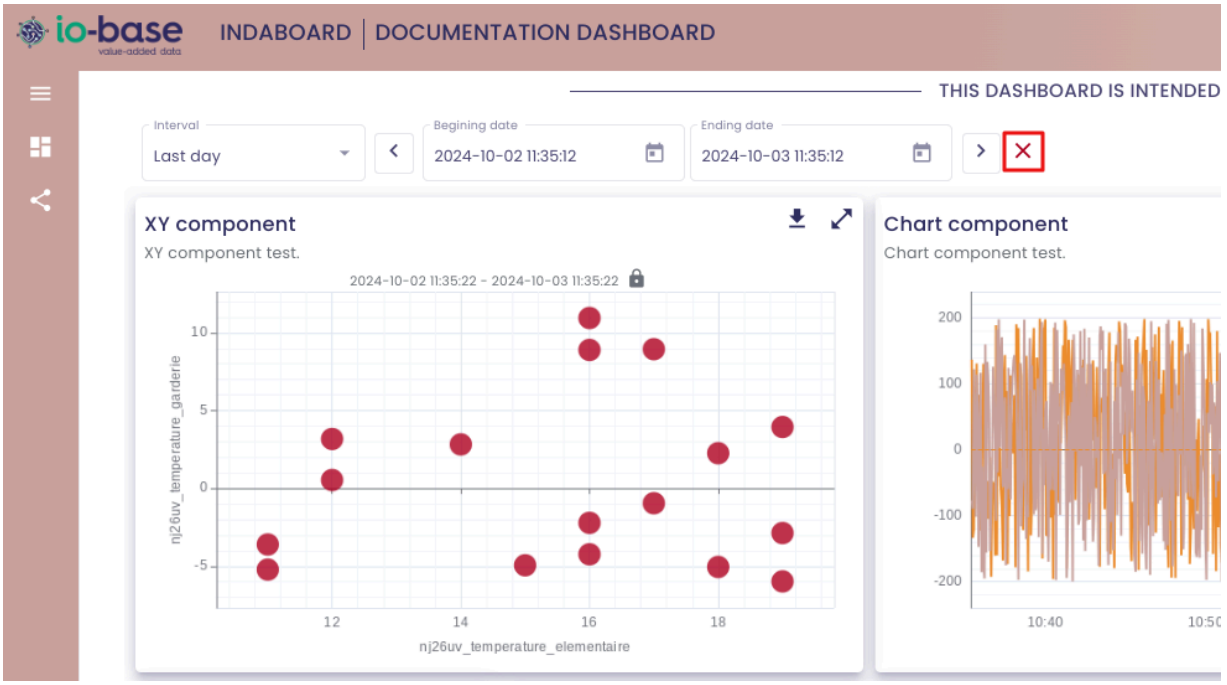


The field for selecting the period appears.



All the components of the table will then take the period of the report as their own. Thus, it is possible to easily set up monthly or weekly summaries for example.

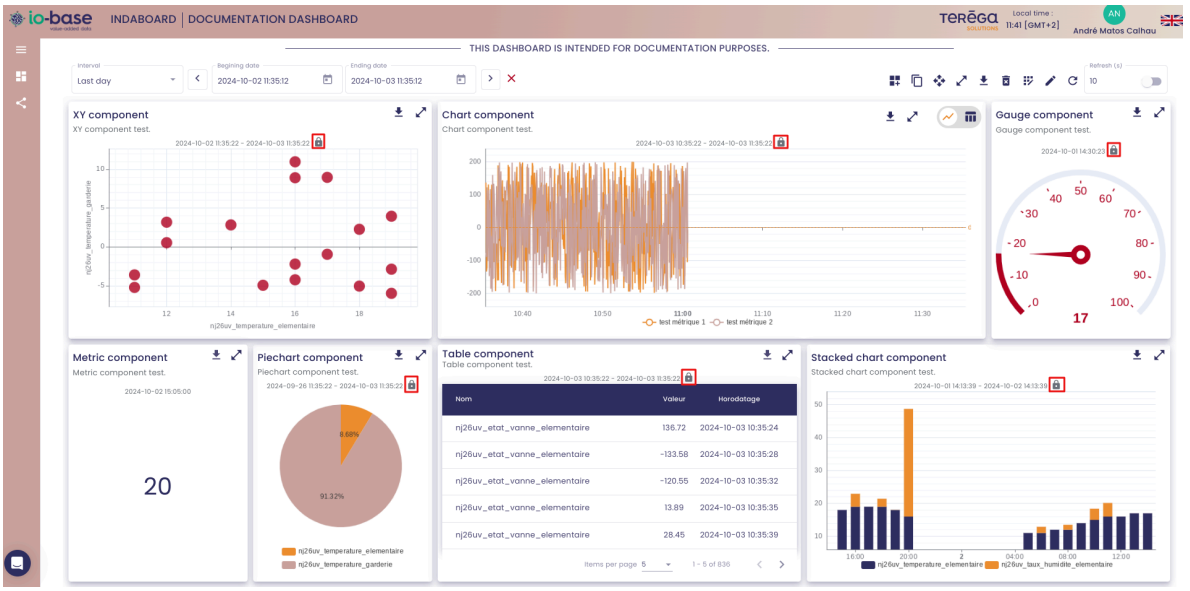
To cancel the setting of a common period for all the components of a dashboard, simply click on the red cross next to the period selection zone. The components will then take the period that is selected in their settings.



2.6.1.3 Locking the period of a component

When a common period is set on a dashboard, it is possible to force a component to ignore this period, and to lock it on the period that is set for it. Open the component settings screen, and check the **Lock** box next to the period selection zone.

Screens that are time-locked appear with a padlock on the dashboard screen at the top right.



2.7. Handling a dashboard

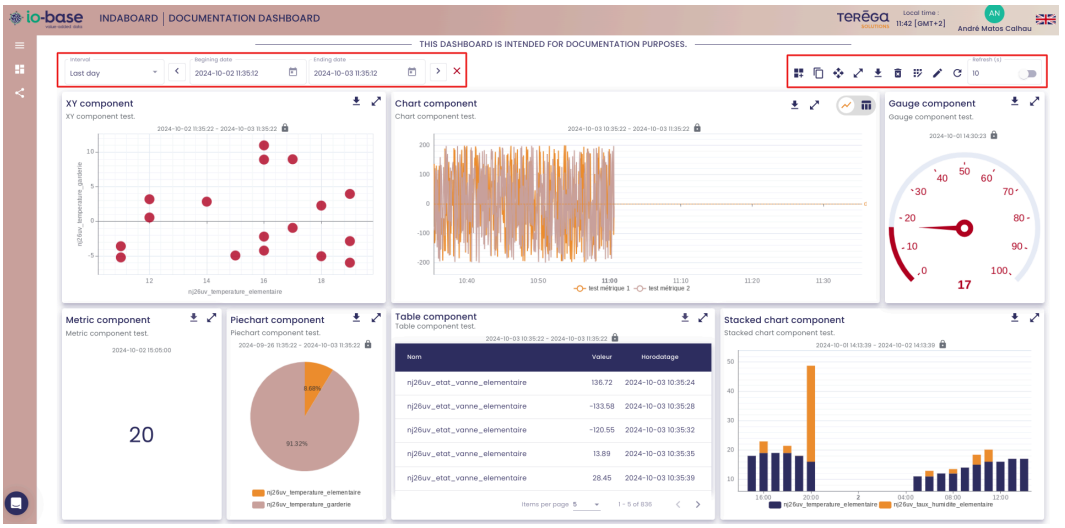
Prerequisites :

From the **io-base** portal, connect to **IndaBoard**.

Through the menu **My Dashboards**, view a dashboard from the list.

When you are on the view page of a dashboard, you can perform a number of actions.

All available actions are located at the top of the dashboard.



At the top left, you can manage the date of the dashboard (for more details, please refer to the dedicated article).

At the top right, you have access to all the other actions:

- addition of components
- duplication of components
- arrangement of components
- switch to full screen mode
- download PDF report
- delete components
- modify components
- change report properties (title and description)

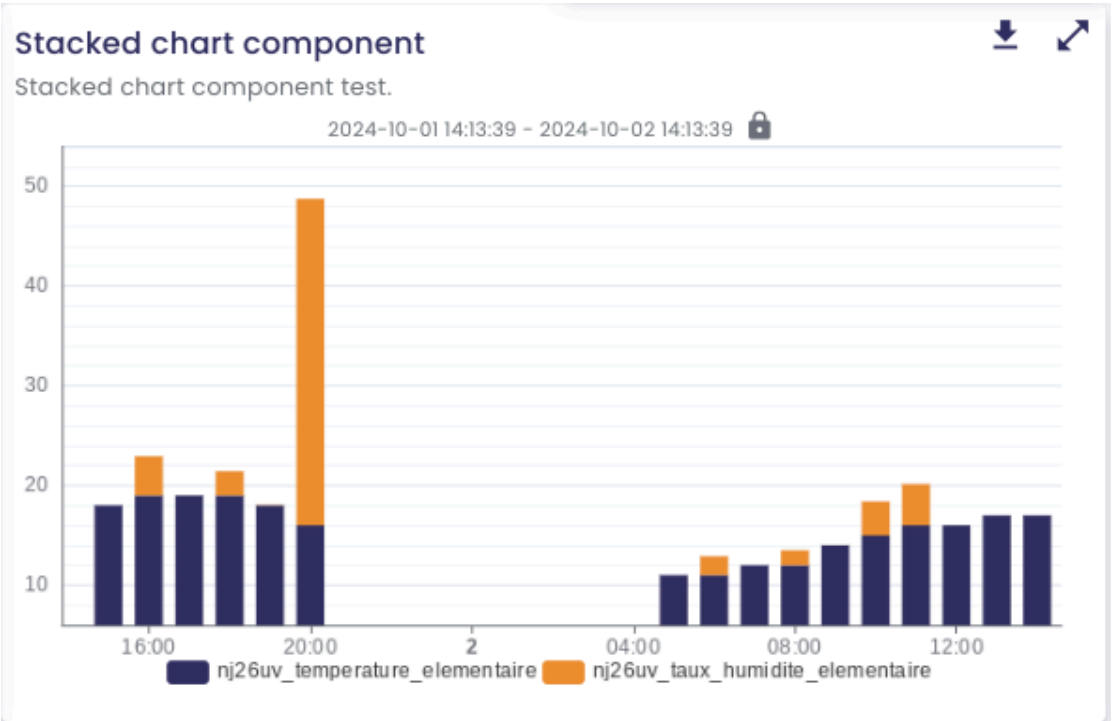
Finally, you can refresh the dashboard, and set an automatic refresh, like in Indaba Explorer.

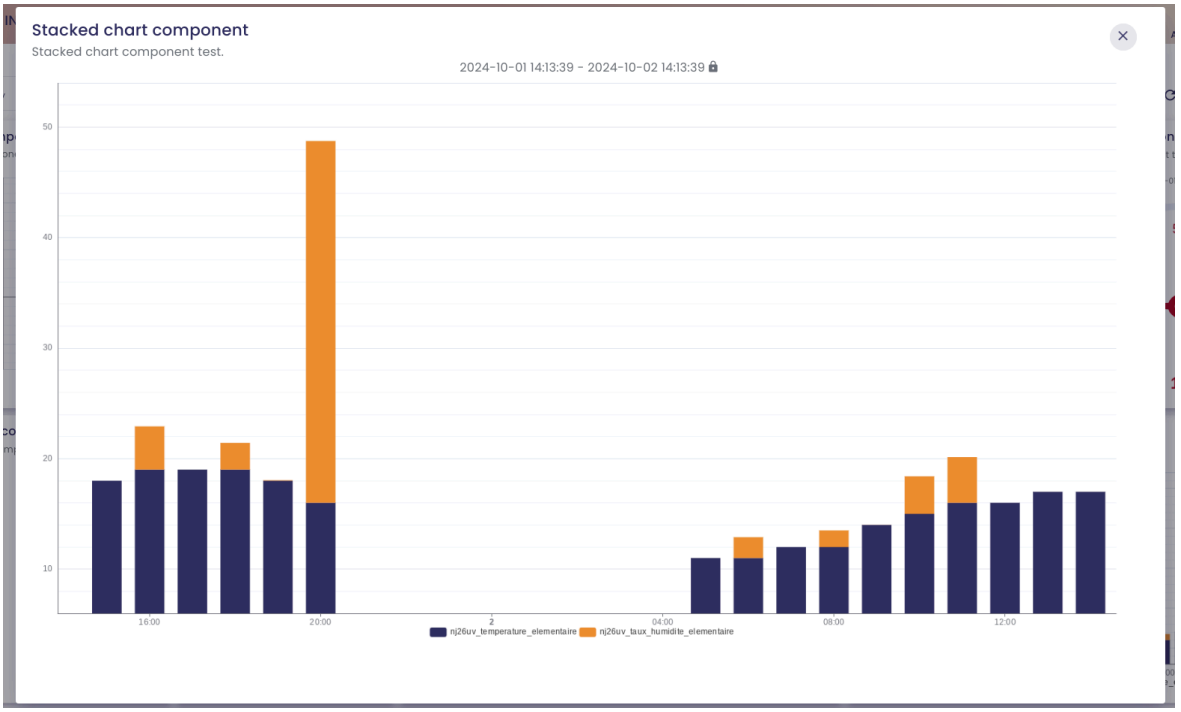
2.7.1.1 Expand dashboard components

You also have the option to expand the components of a dashboard.

To do so, use the icon

located at the top right of the component.



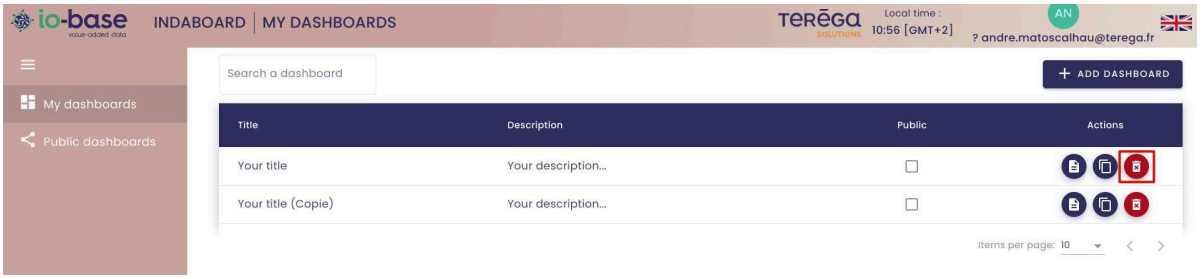


2.8. Delete a dashboard

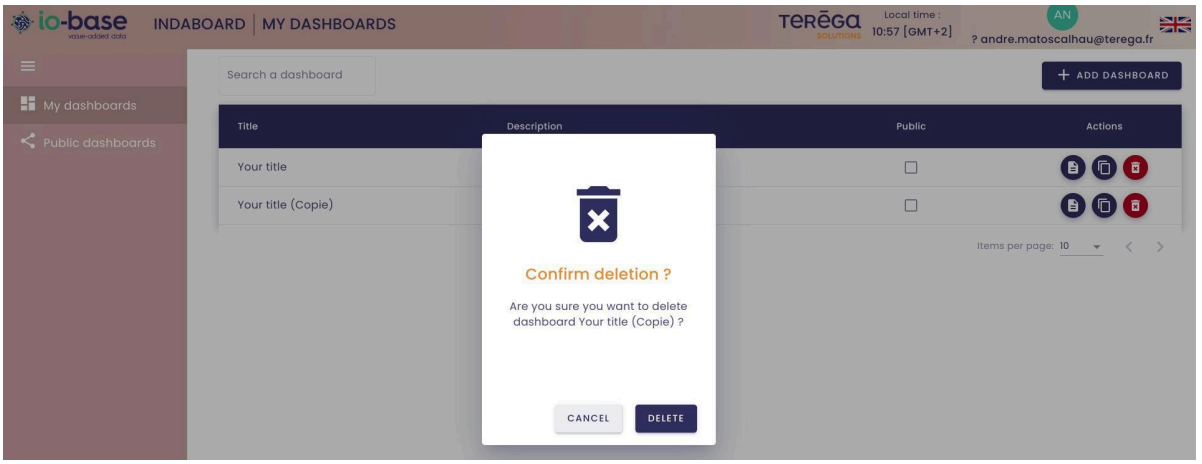
Prerequisites : connect to the io-base portal, and access to Indaboard.

Access to the **My dashboards** menu.

From the screen listing the dashboards, a delete icon is available in the **Actions** column. Click on this icon to delete a dashboard.



A confirmation window appears.



Click on Delete to confirm the deletion of the dashboard.
The dashboard and all its components are deleted, and it disappears from the list.

3. Dashboards' components

3.1. Create a dashboard's component

Prerequisites : from the **io-base** portal, connect to **IndaBoard**.

Through the menu **My Dashboards**, view a dashboard from the list.

3.1.1 The components

A dashboard is a set of components, arranged on a grid.
Several types of components are available:

- chart
- stacked chart
- piechart
- XY chart
- gauge
- table
- metric

To add a component, click on the icon at the top right.

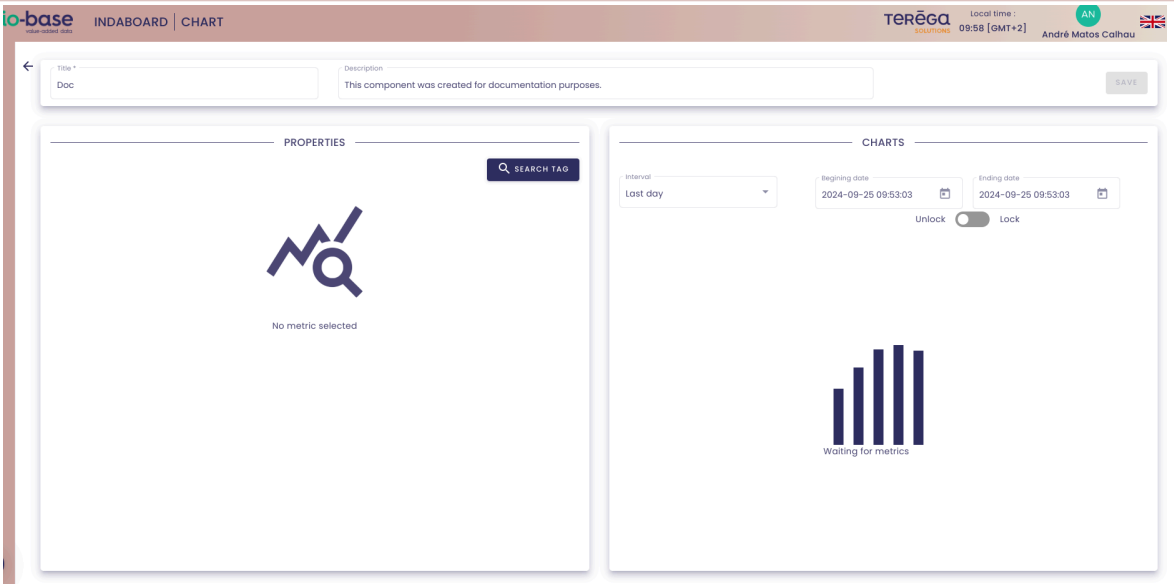
The list of available components is displayed. Choose the component you want to create.

3.1.2 Creating a Graphic component

Properties : to create a graphic component, you must first enter the general information of the component:

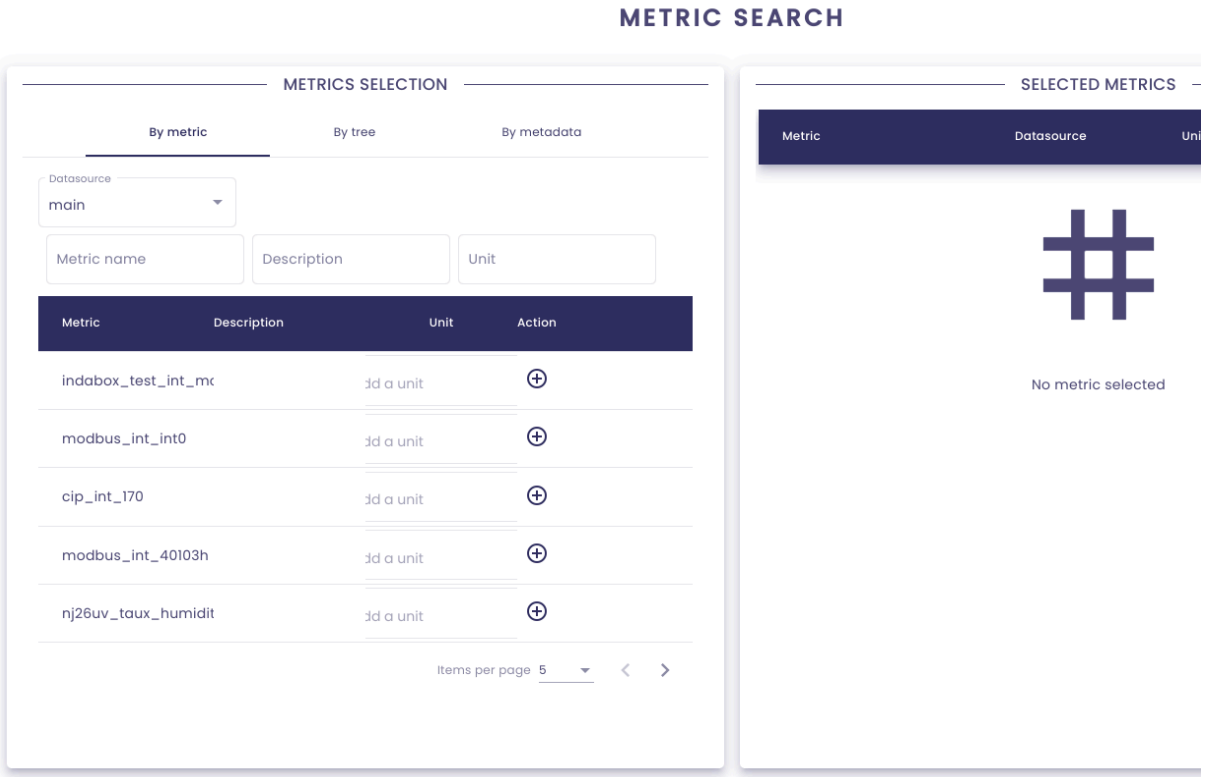
- a title
- a description (optional)
- the period of the data involved

Note : the Lock box allows you to force the application of the selected period for this component, in case a period is chosen for the whole dashboard.



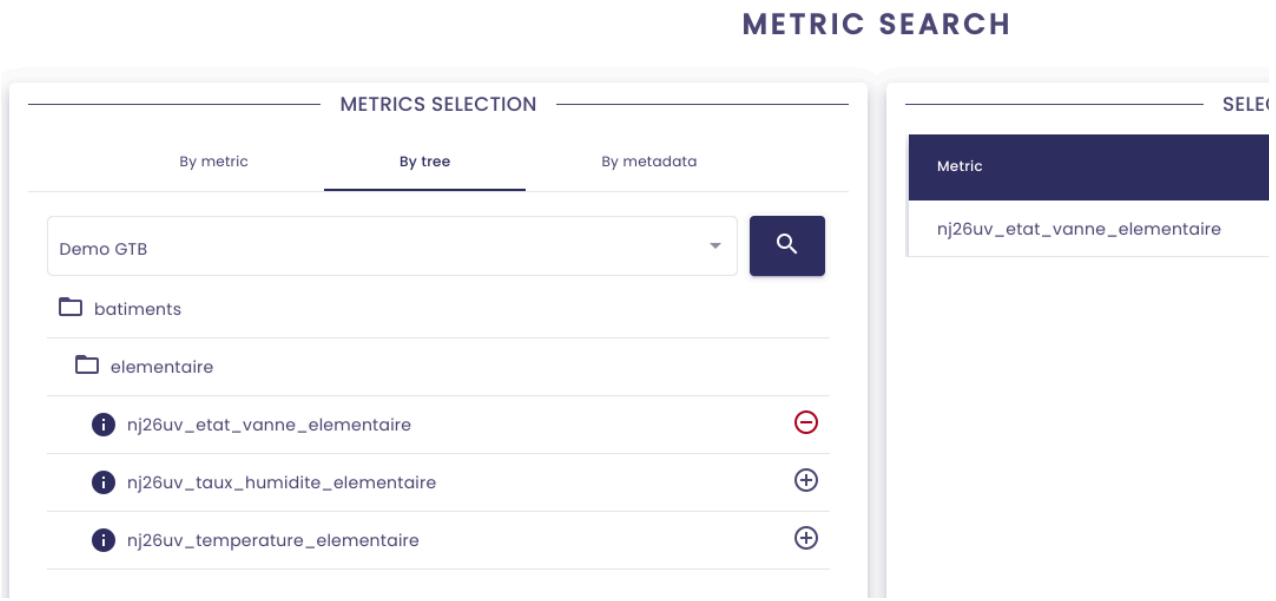
3.1.2.1 Curves

Once the general information is entered, you can select the metrics to be used, by clicking on the **Search metric** button.



The usual **io-base** metric search window opens. Several tabs allow a search either from the tree structure, or by meta-data, or by metric name. When you have found the right metrics, click on the button to add them. The metrics appear in the table on the right.

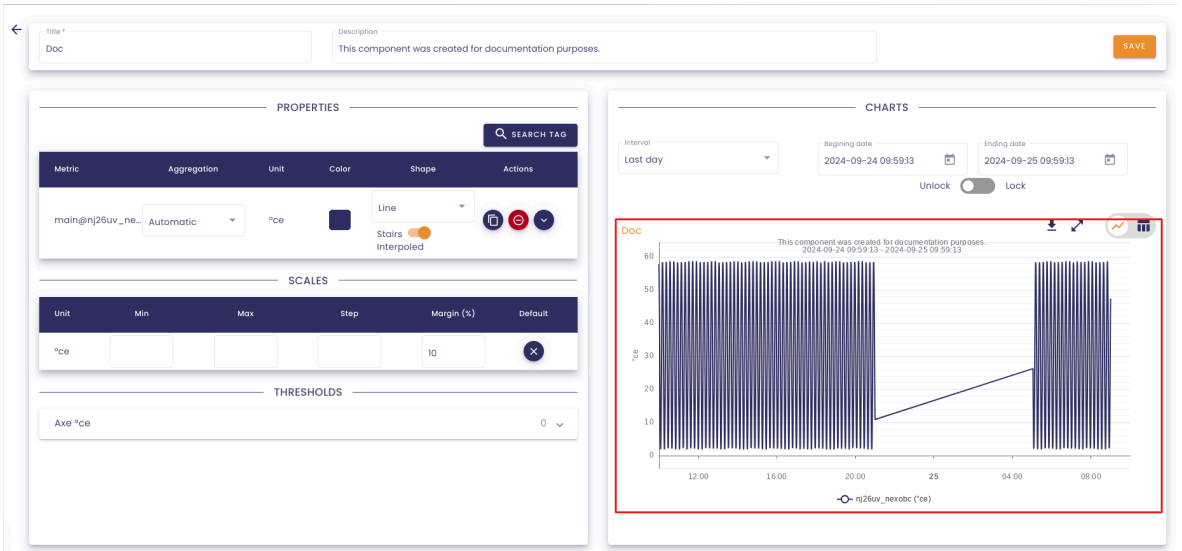
You can delete the metrics from the right table by using the delete icon.



Note : for a graphic component, it is possible to add several metrics.

To validate the selection, click on **Save**.

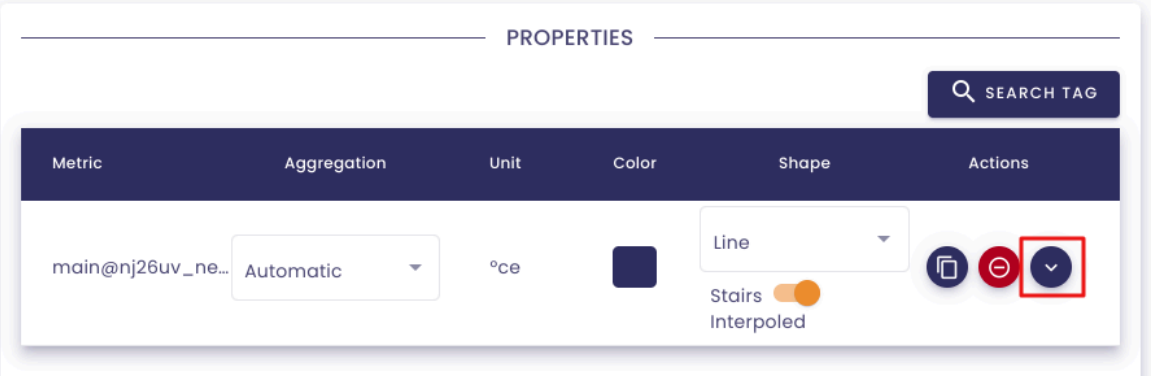
A preview of the graph is displayed on the right.



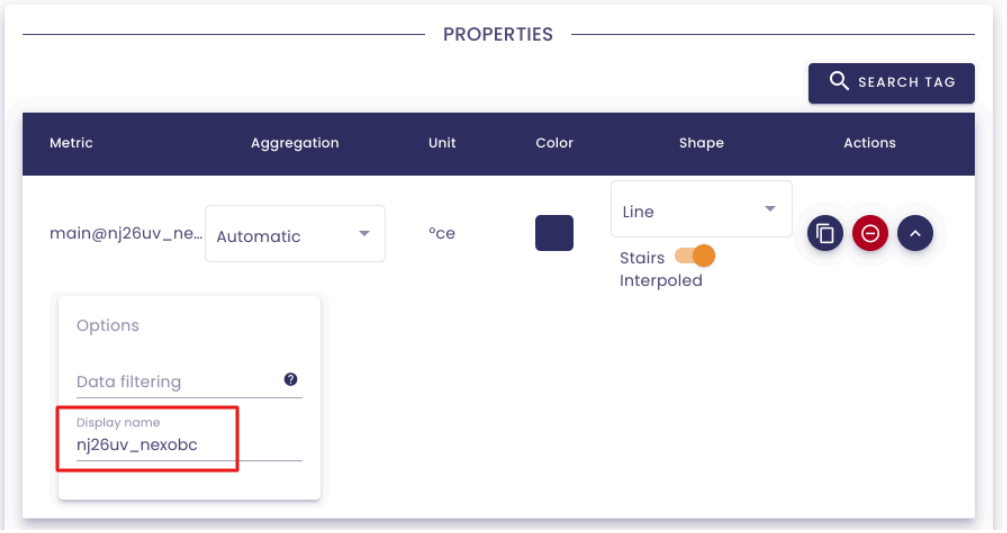
You can set several details on the charts :

- the name of the curve (which will change in the caption)

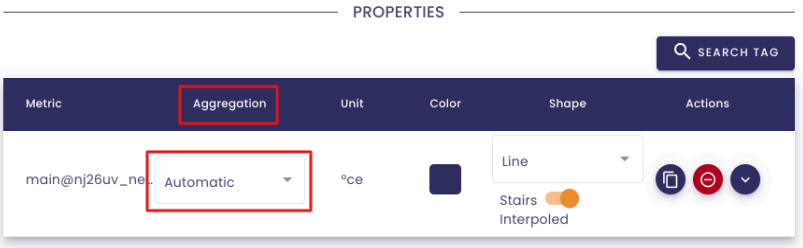
  To do so, go to the **Actions** column, then click on the button enlightened below :



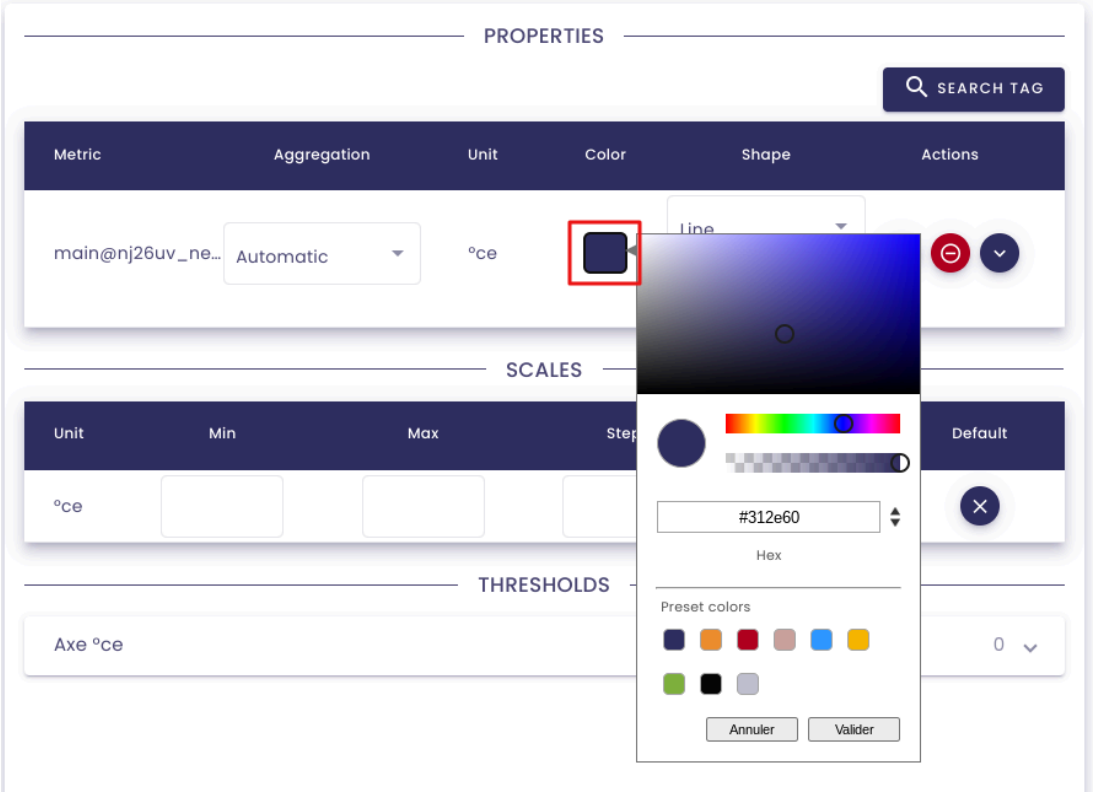
  The '**Options**' section becomes visible, and contains the '**Display name**' field. Here you can enter the name you want :



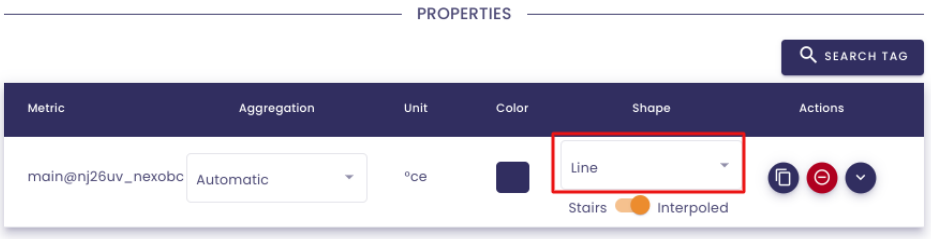
- the type of aggregation used



- the color used

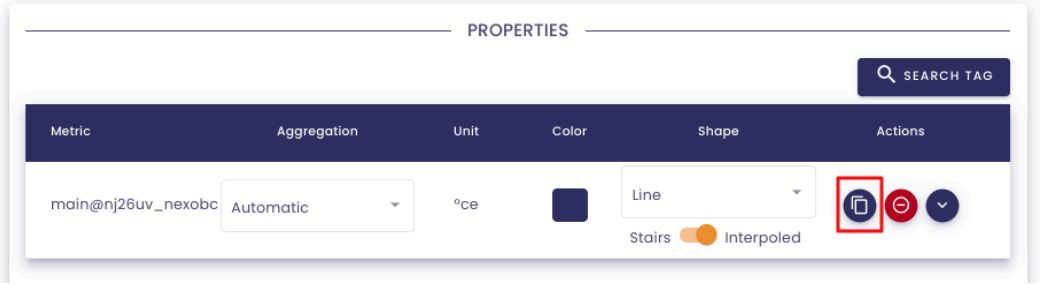


- the type of graph (histogram, curve or scatter plot)



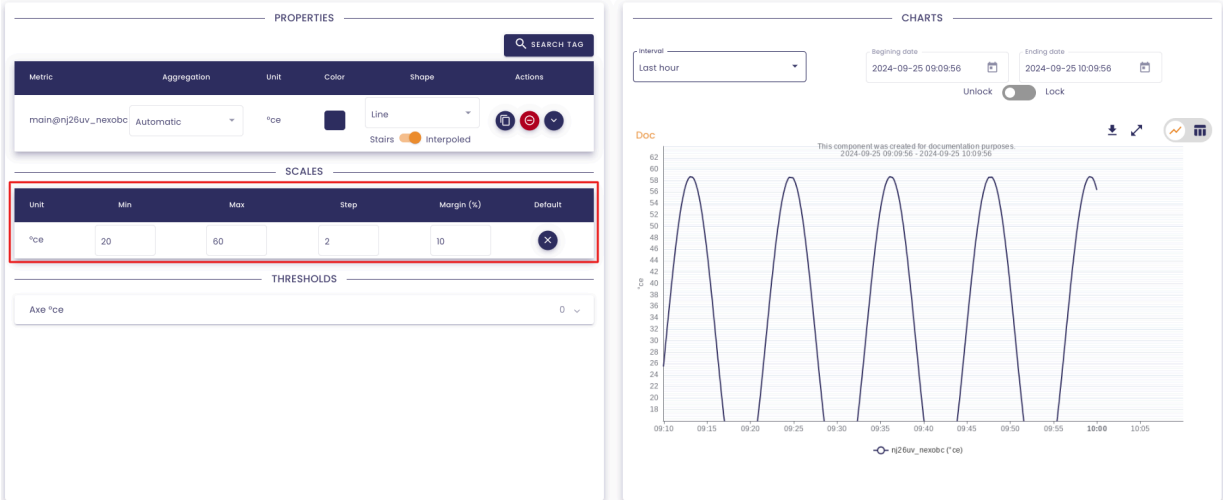
You can also indicate whether you want the curves to appear in a staircase (straight lines from value to value) or interpolated.

Each curve can be duplicated. To do so, go to the Actions column, and click on the boxed button below.



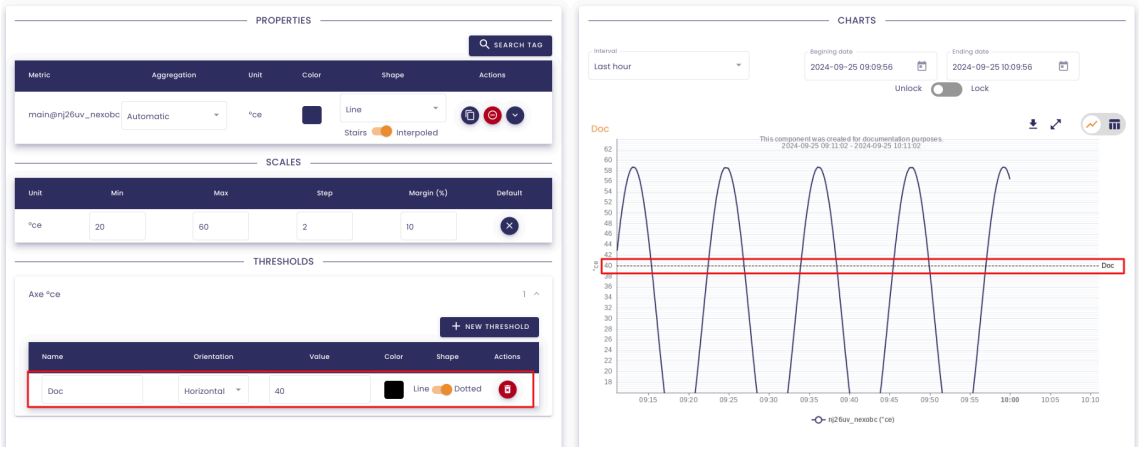
3.1.2.2 Scales

From the Scales table, you can enter minimum and maximum values for the visibility of your graph, as well as the pitch to be applied for the graduations. Each time you make a change, the graph updates on the right side to show the changes.

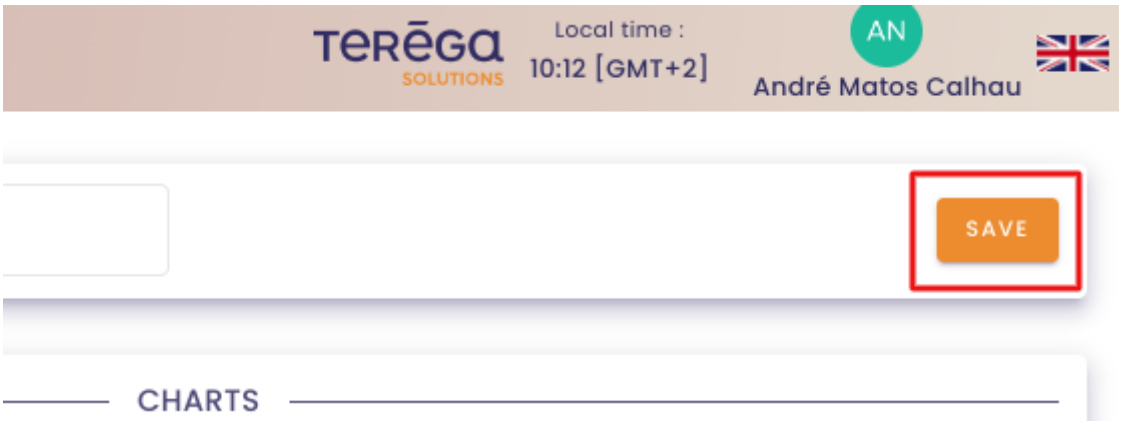


3.1.2.2 Thresholds

Finally, it is possible to define one or several thresholds (horizontal or vertical, with legend, color, and if it should appear as a continuous or dotted line).



Once all the settings are complete, you can click on Save to save and make your component appear in the dashboard.

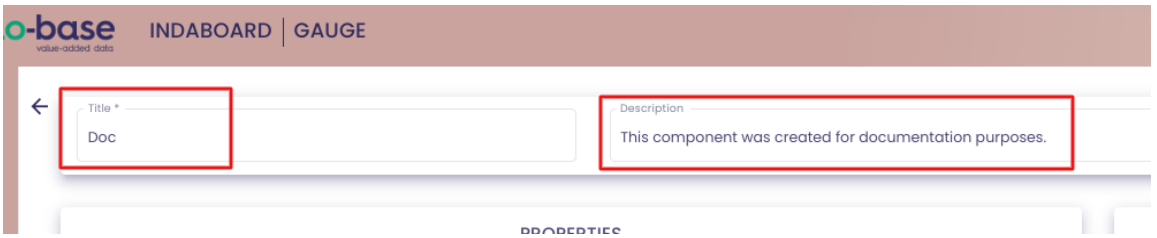


3.1.3 Creation of a gauge component

3.1.3.1 Properties

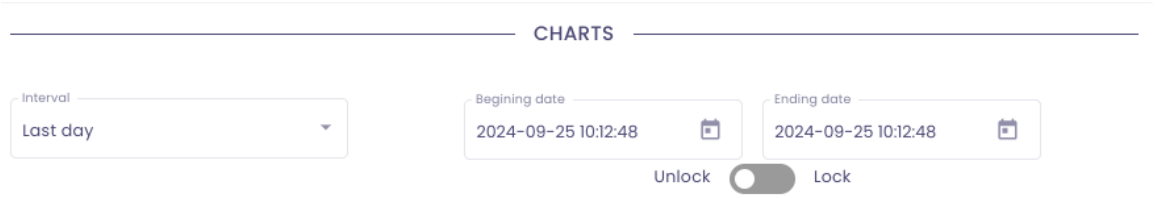
To create a gauge component, you must first enter the general information of the component:

- a title
- a description (optional)

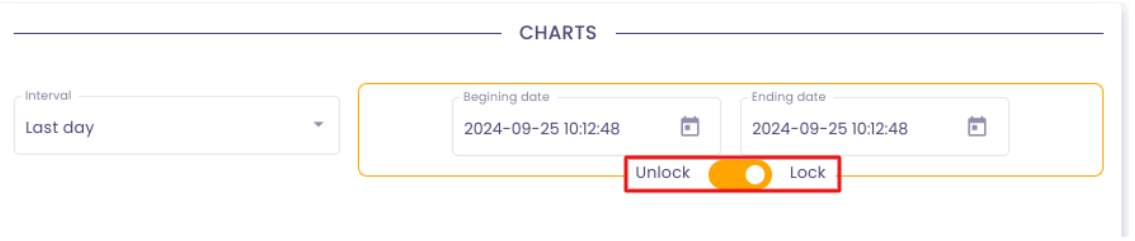


- a minimum value (start value of the gauge) and a maximum value (end value of the gauge)

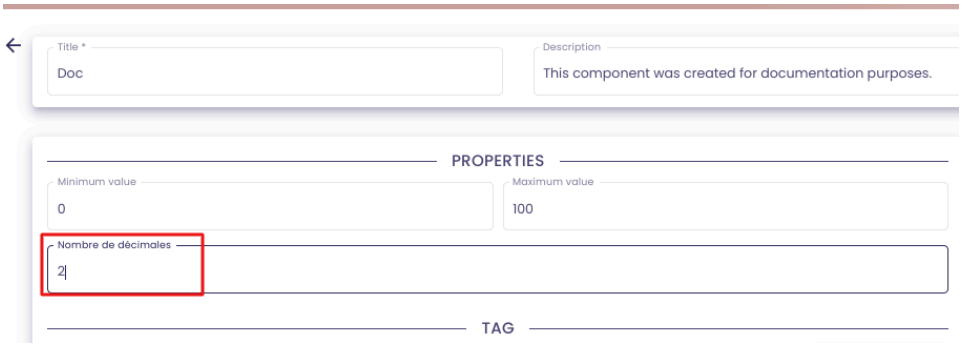
- the time interval of the data involved



Note: the Lock box allows you to force the application of the selected period for this component, in case a period is chosen for the whole dashboard.

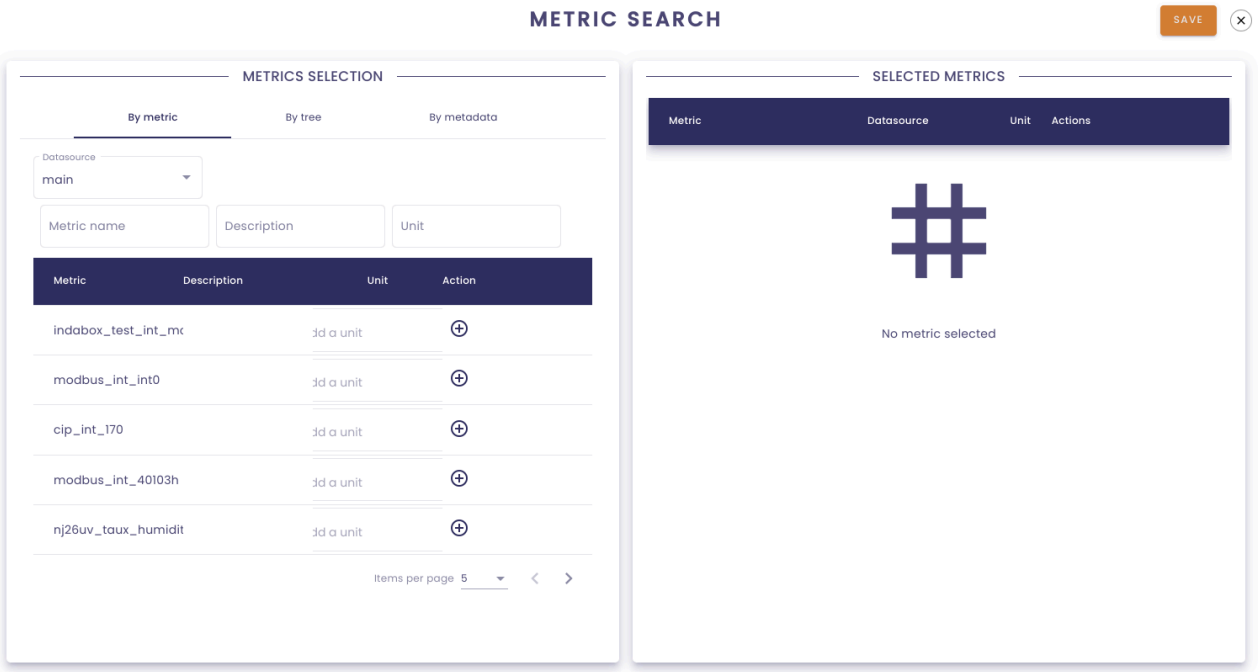


- the number of decimal places to display on the gauge



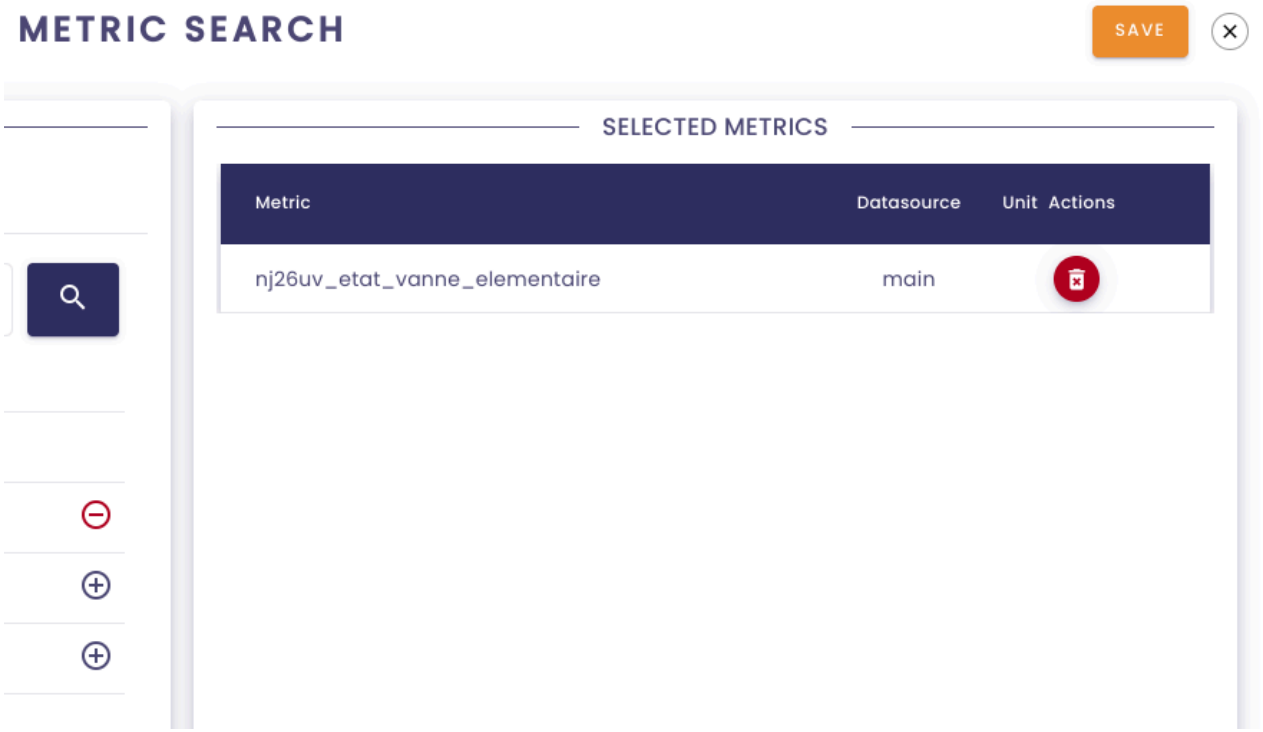
3.1.3.2 Metrics

Once the general information is entered, you can select the metrics to be used, by clicking on the **Search metric** button.



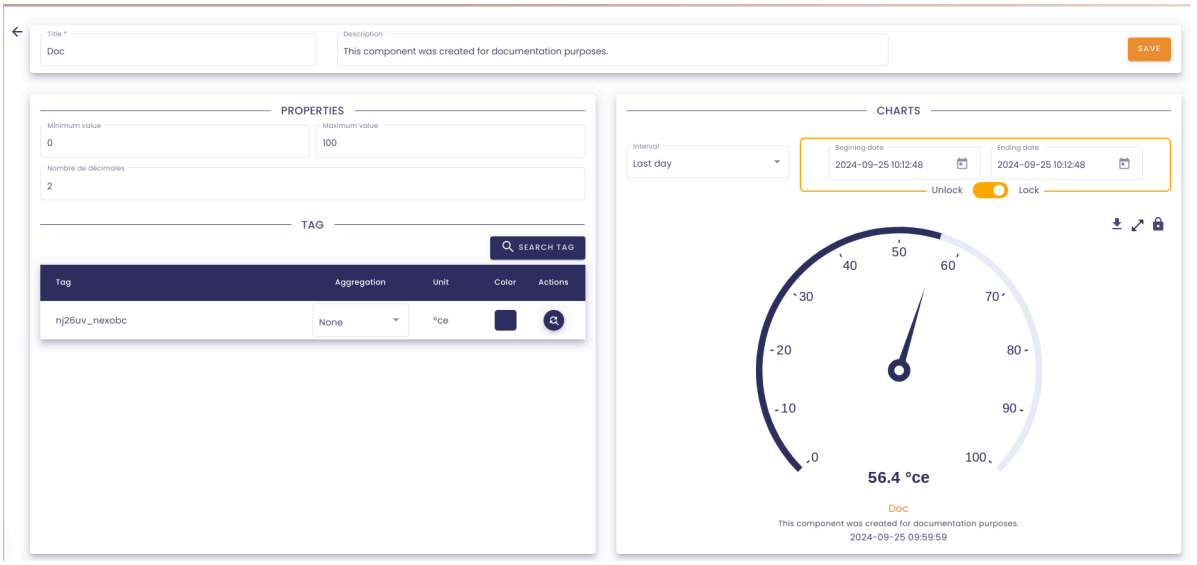
The usual io-base metric search window opens. Several tabs allow a search either from the tree structure, or by meta-data, or by metric name. When you have found the right metric, click on the button to add it. The metric appears on the right.

You can delete the metric from the right table by using the delete icon.



Note : for a gauge component, it is possible to add a single metric.

To validate the selection, click on **Save**.
A preview of the counter is displayed on the right.

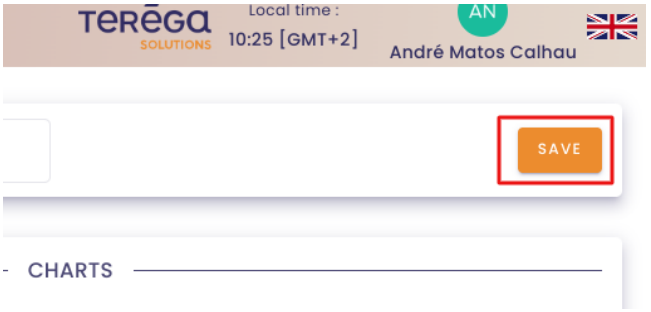


You can set several details on the gauge:

- the type of aggregation used

- the color used

Once all the settings are complete, you can click on Save to save and make your component appear in the dashboard.



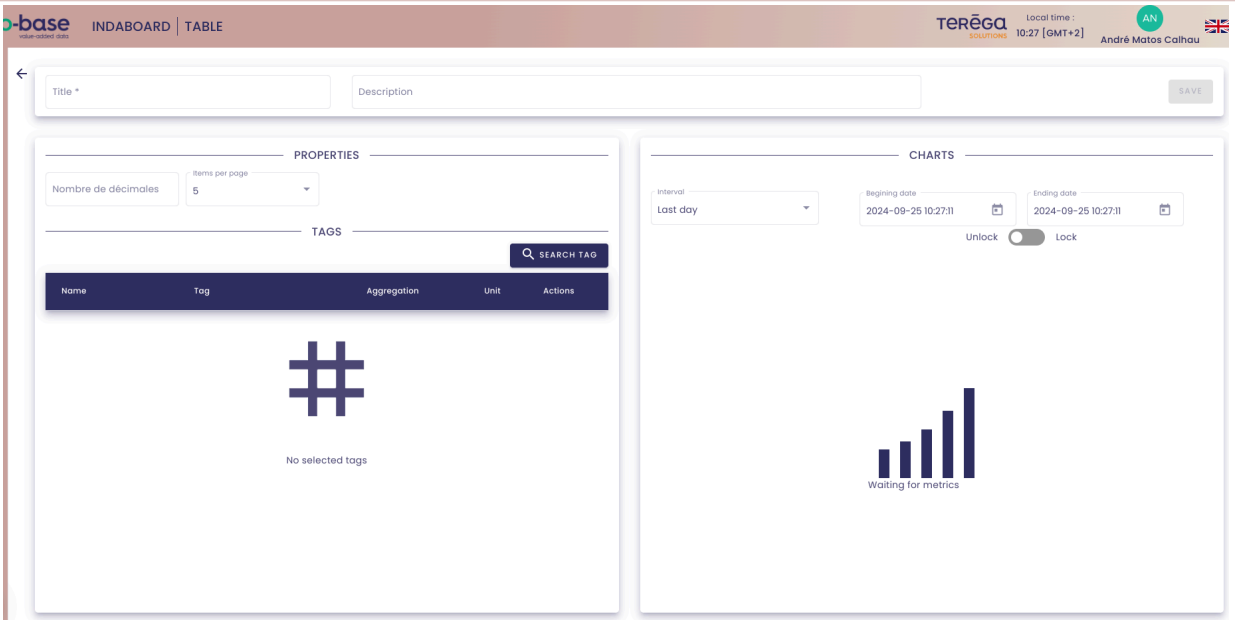
3.1.4 Creation of a table component

3.1.4.1 Properties

To create a table component, you must first enter the general information of the component:

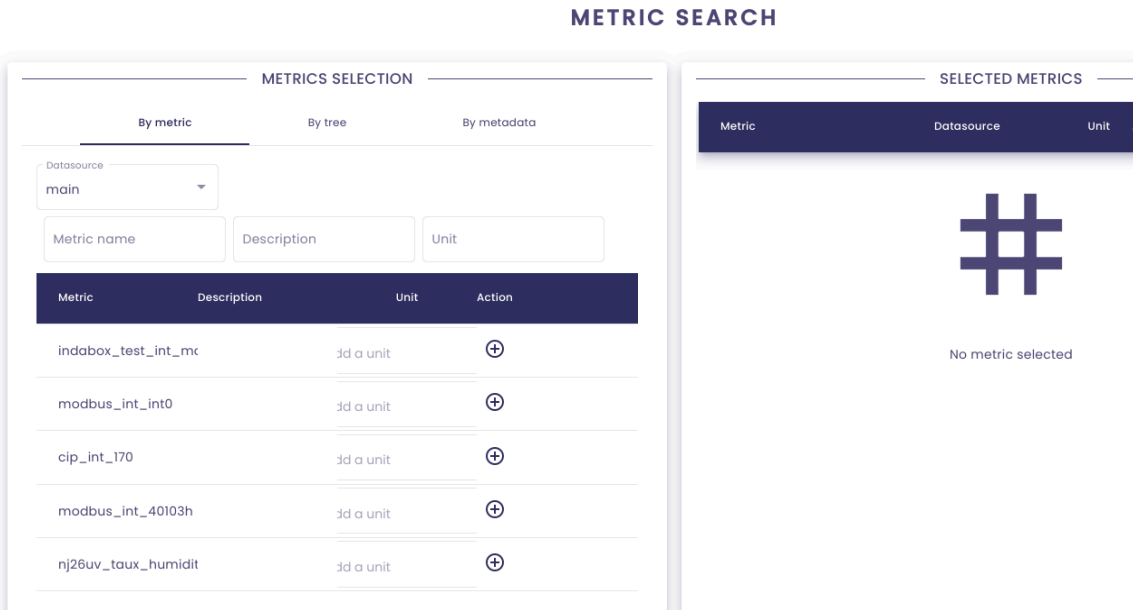
- a title
- a description (optional)
- the time interval of the data involved
- the number of decimal places of the displayed values
- the number of elements that will appear per page in the table (number of rows in the table)

Note : The **Lock** box allows you to force the application of the selected period for this component, in case a period is chosen for the whole dashboard.



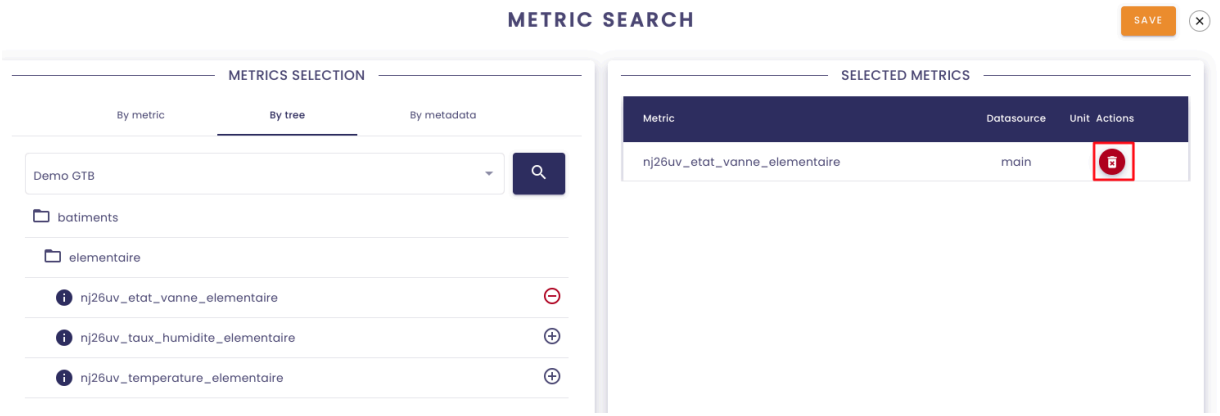
3.1.4.2 Metrics

Once the general information is entered, you can select the metrics to be used, by clicking on the Search metric button.



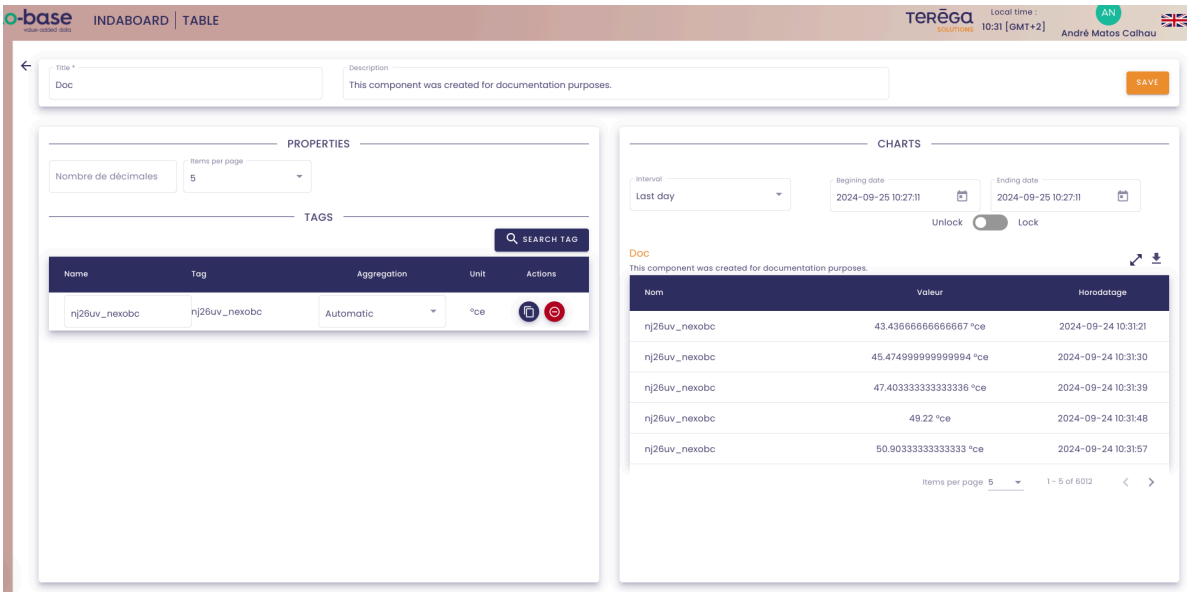
The usual **io-base** metric search window opens. Several tabs allow a search either from the tree structure, or by meta-data, or by tag name. When you have found the right metrics, click on the button to add them. The metrics appear in the table on the right.

You can delete the metrics from the right table by using the delete icon.



Note : for a table component, it is possible to add several metrics.

To validate the selection, click on **Save**.
A preview of the table is displayed on the right.



You can set several details on the table :

- the metric name (which will change in the first column of the table)
- the type of aggregation used

Each line can be duplicated.

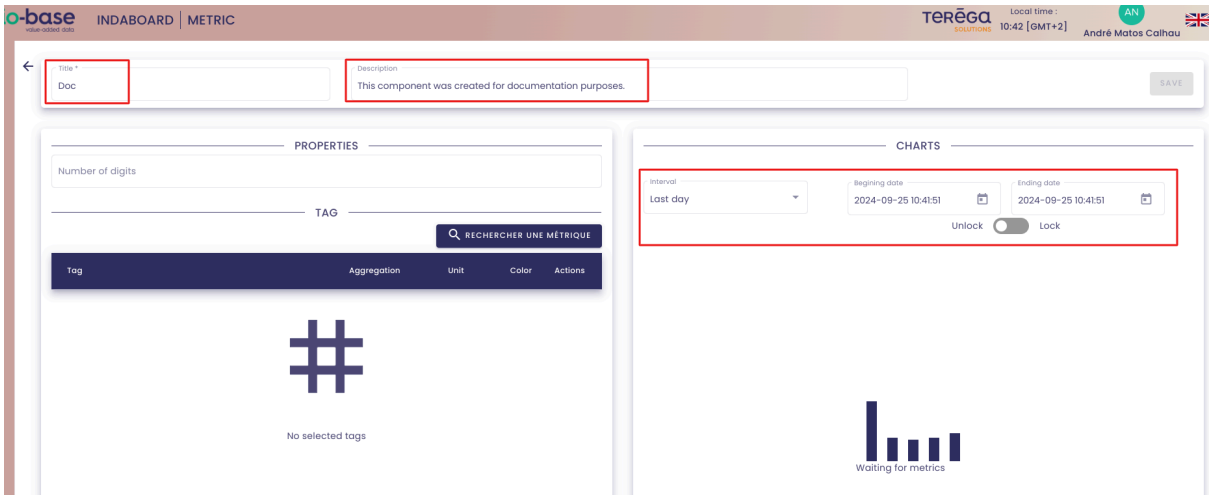
Once all the settings are complete, you can click on Save to save and make your component appear in the dashboard.

3.1.5 Creating a metric component

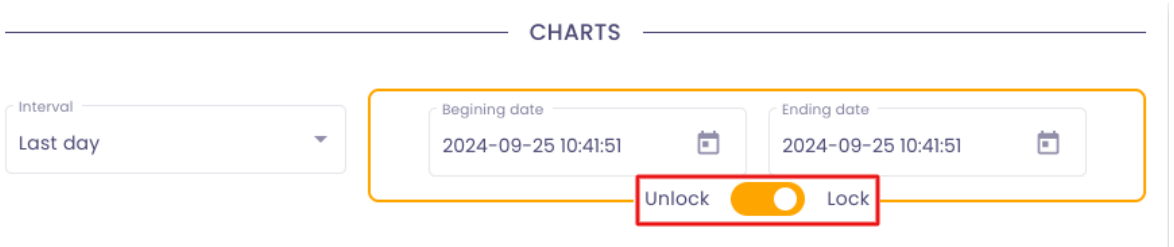
3.1.5.1 Properties

To create a metric component, you must first enter the general information of the component:

- a title
- a description (optional)
- the time interval of the date involved
- the number of decimal places of the displayed values

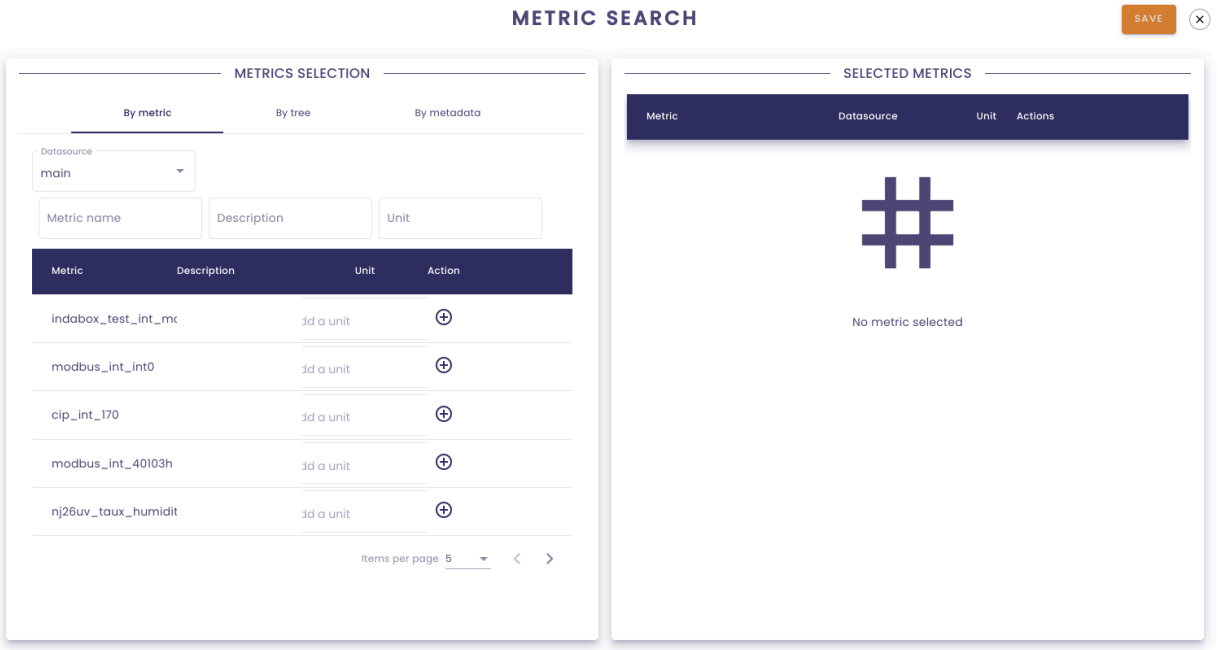


Note : the Lock box allows you to force the application of the selected period for this component, in case a period is chosen for the whole dashboard.



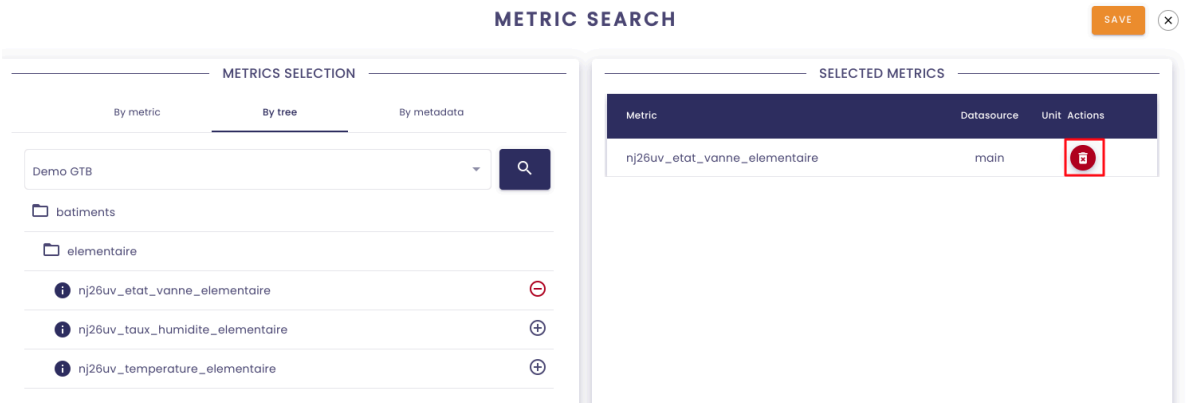
3.1.5.2 Metrics

Once the general information is entered, you can select the metrics to be used, by clicking on the **Search metric** button.



The usual **io-base** metric search window. Several tabs allow a search either from the tree structure, or by meta-data, or by metric name. When you have found the right metric, click on the button to add it. The metrics appear in the table on the right.

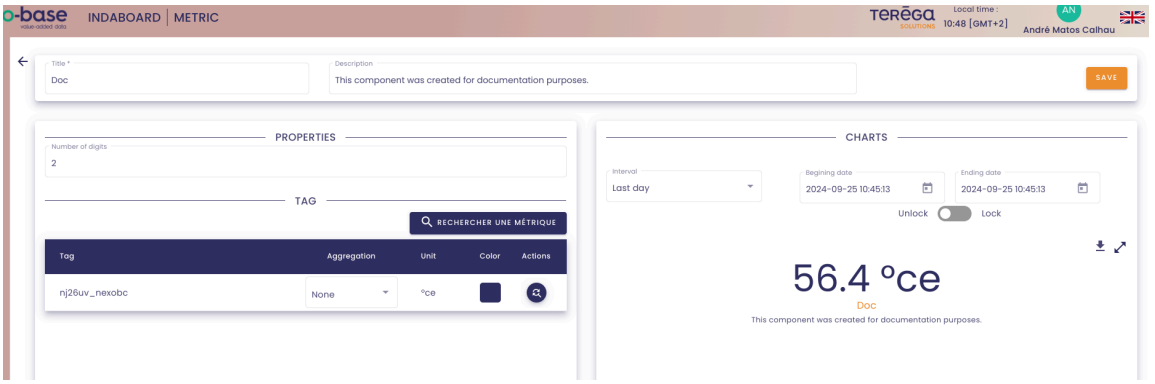
You can delete the metric from the right table by using the delete icon.



Note : for a metric component, it is possible to add a single metric.

To validate the selection, click on Save.

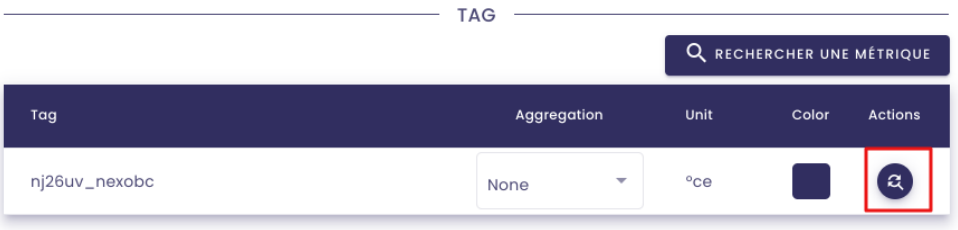
A preview of the table is displayed on the right.



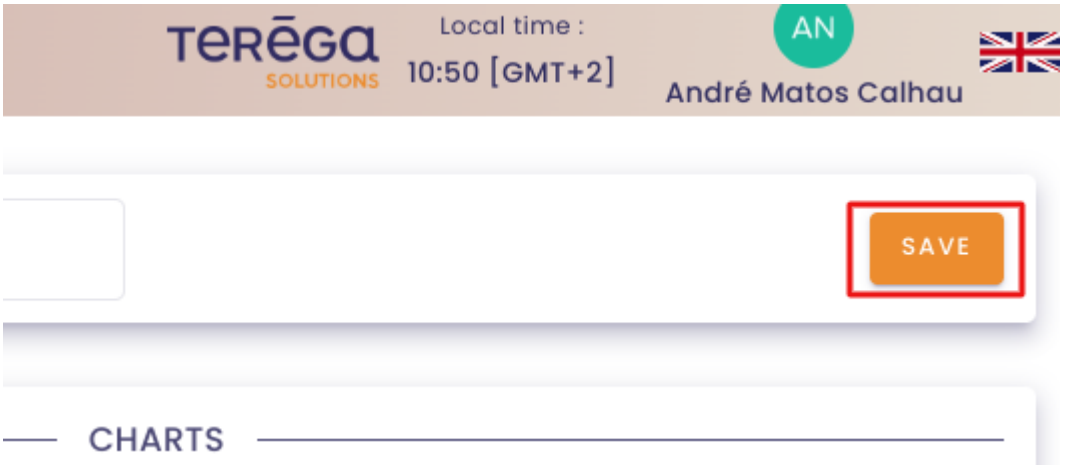
You can set several details on the table:

- the type of aggregation used
- the color used

You can also replace the selected metric using the 'Replace' button in the **Actions** column.



Once all the settings are complete, you can click on Save to save and make your component appear in the dashboard.

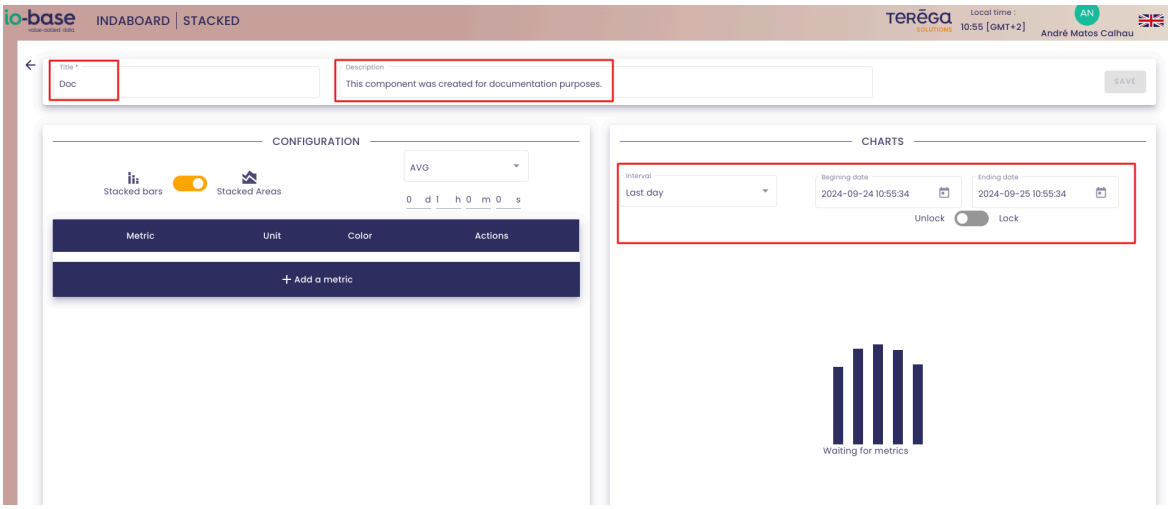


3.1.6 Creating a stacked chart component

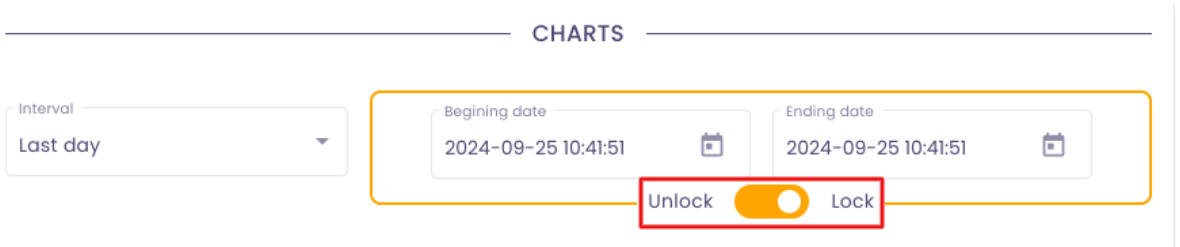
3.1.6.1 Configuration

To create a component, you must start by entering the general information of the component :

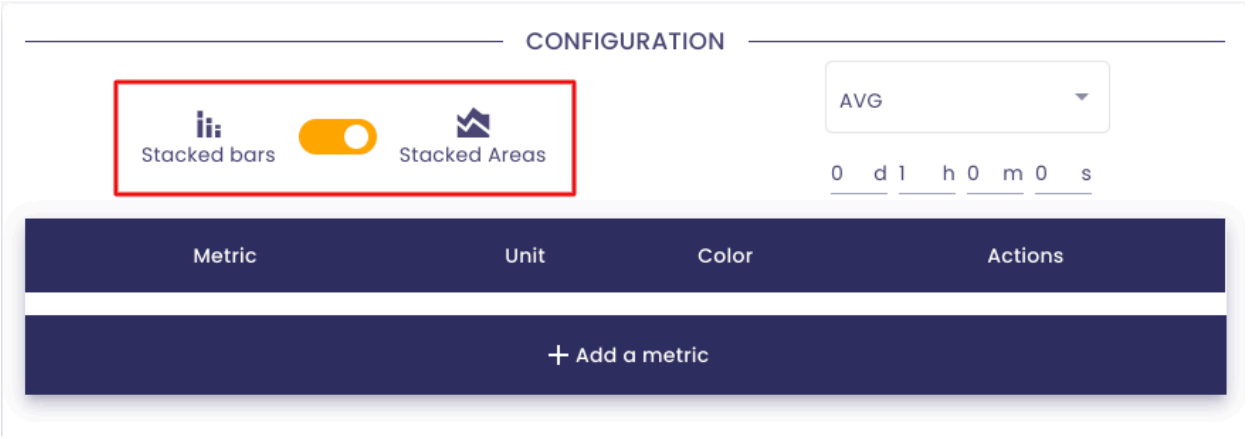
- a title
- a description (optional)
- the period of the relevant data :



Note : the **Lock** box allows you to force the application of the selected period for this component, in case a period is chosen for the whole dashboard.

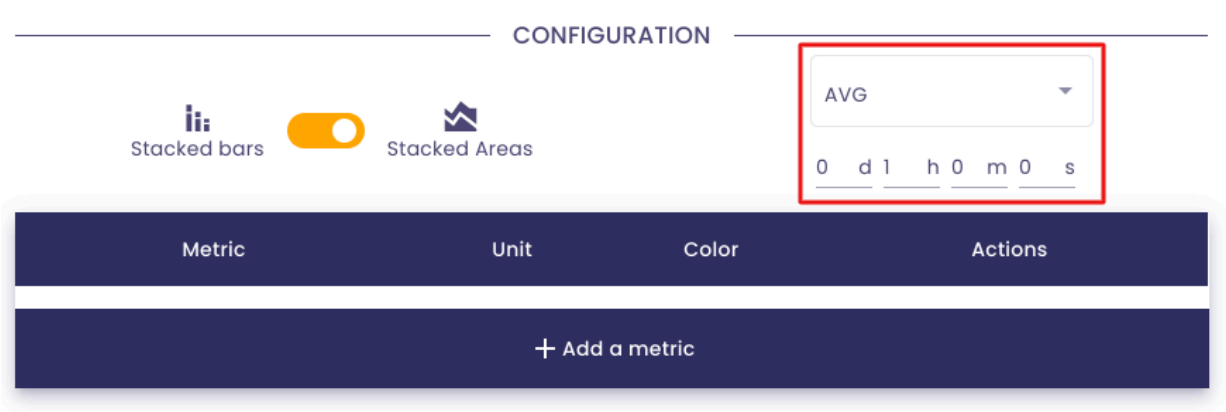


- the type of stacked chart : stacked bars or stacked areas



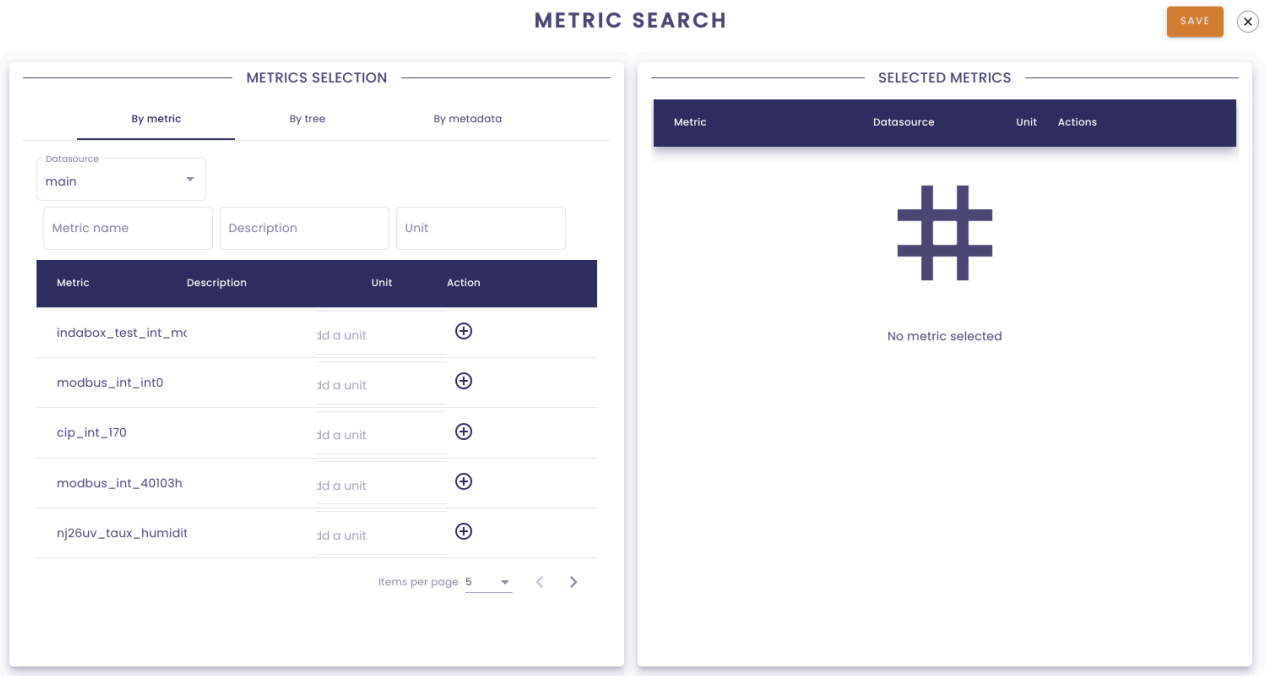
- the aggregation to apply to the graphics and the reference duration :

For example, if we want to get the average of the values every hour, we select the aggregation '**AVG**' and indicate 1h as the duration :



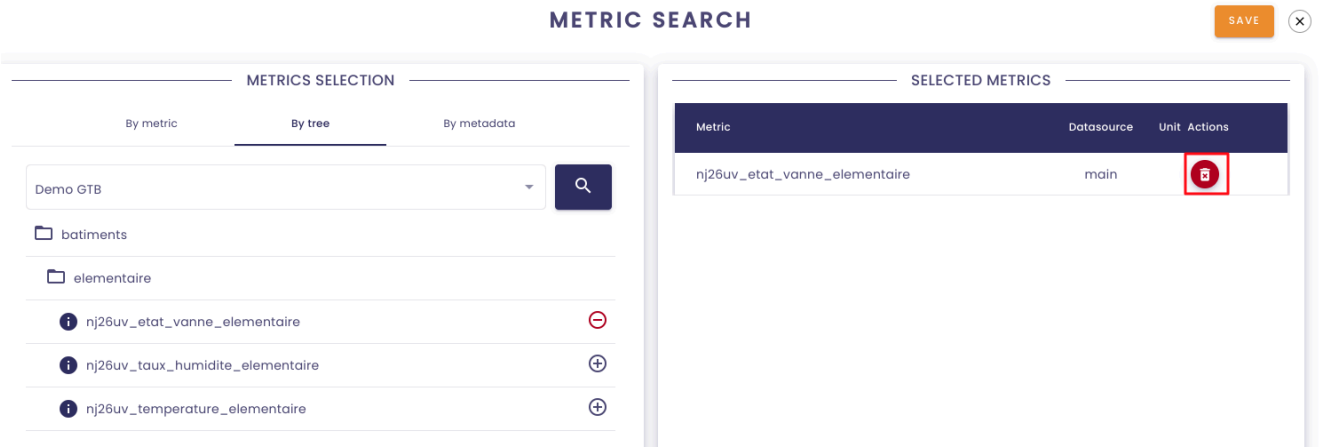
3.1.6.2 Metric

Once the general information is entered, you can select the metrics to use by clicking on the '**Search metric**' button.



The usual **io-base** metric search window. Several tabs allow a search either from the tree structure, or by meta-data, or by metric name. When you have found the right metric, click on the button to add it. The metrics appear in the table on the right.

You can delete the metric from the right table by using the delete icon.

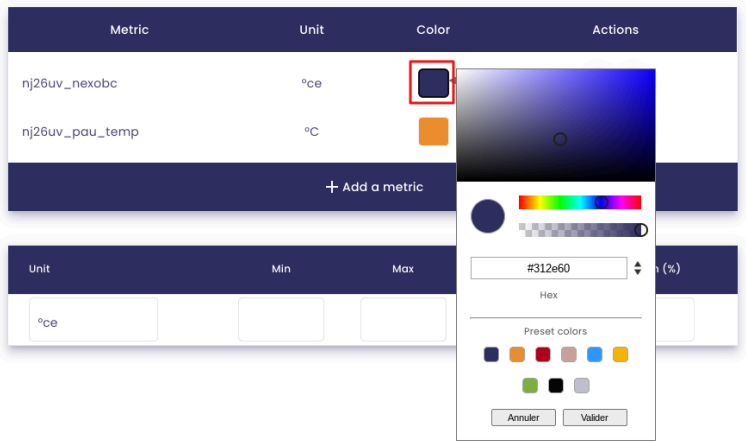


Note : for a stacked chart component, it is possible to add several metrics.

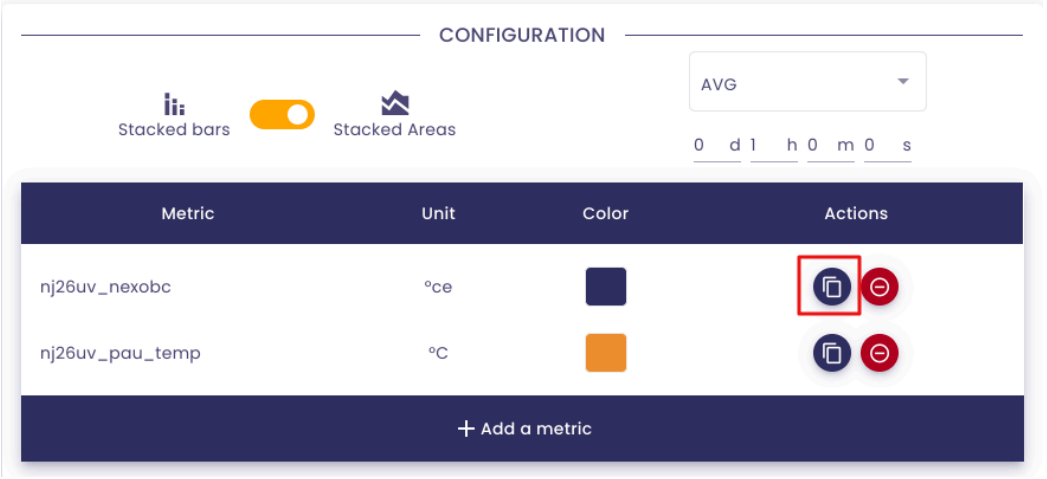
To confirm the selection, click on **Save**.

A preview of the component will appear on the right.

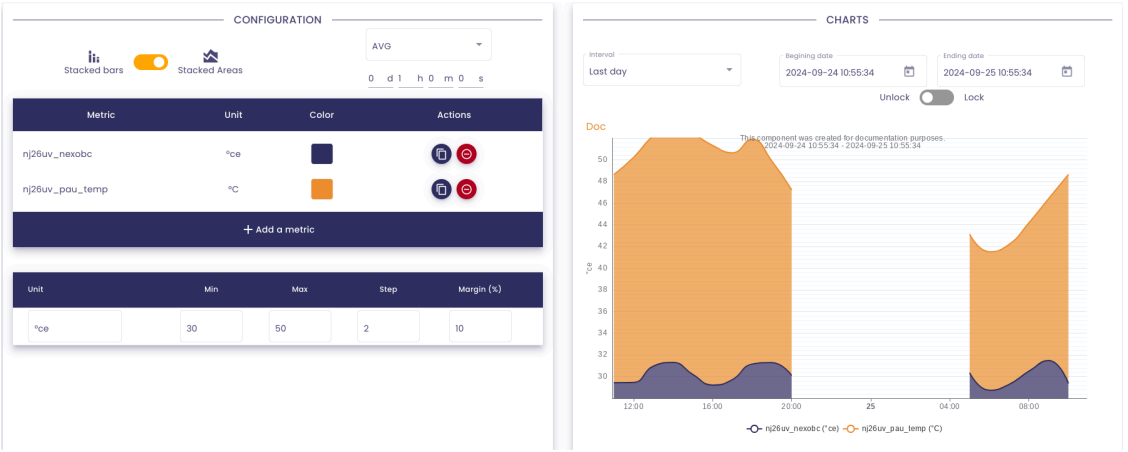
You can configure the color used for displaying the graphs :



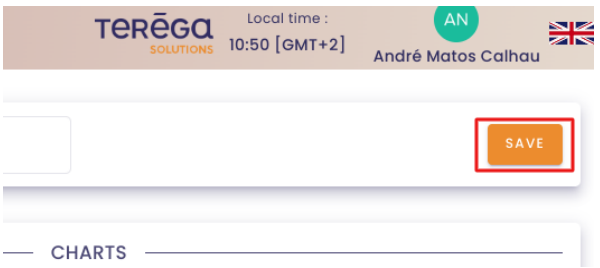
Each curve can be duplicated. To do so, in the **Actions** column, click on the button outlined below :



You can also enter minimum and maximum visibility values for your graphic, as well as the interval to apply for the graduations. With each change, the graphic updates on the right side to visualize the changes.



Once all the settings are complete, you can click on **Save** to save and make your component appear in the dashboard.

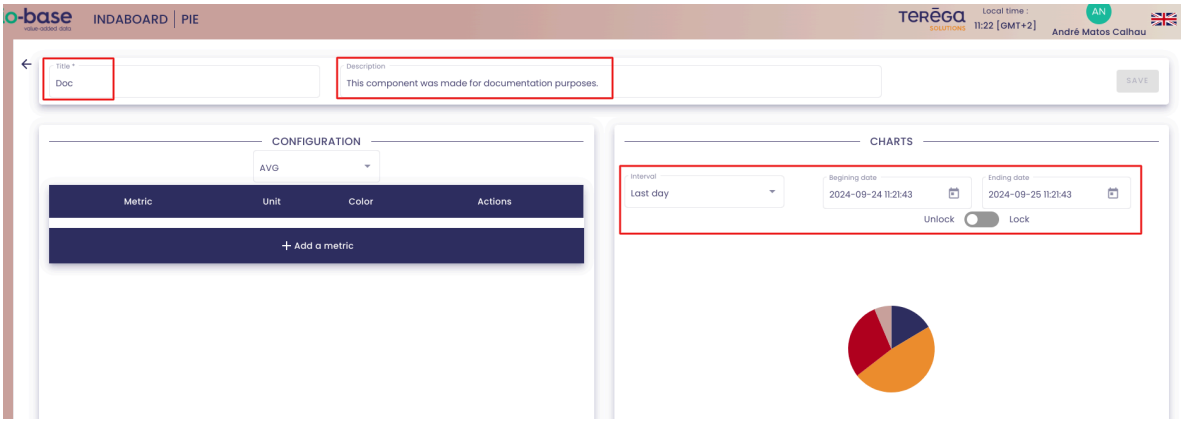


3.1.7 Creating a pie chart component

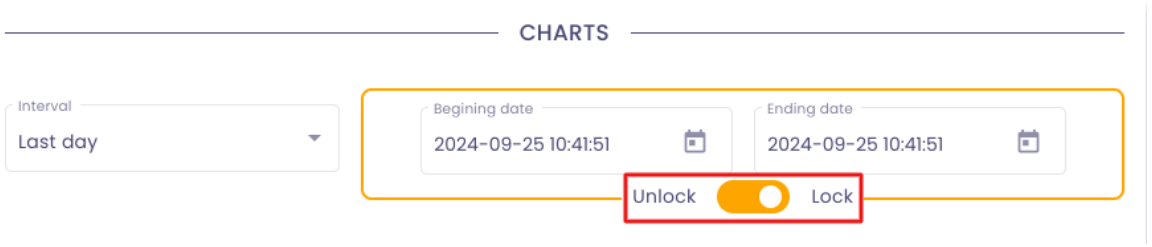
3.1.7.1 Configuration

To create a pie chart component, you must start by entering the general information of the component:

- a title
- a description (optional)
- the period of the relevant data

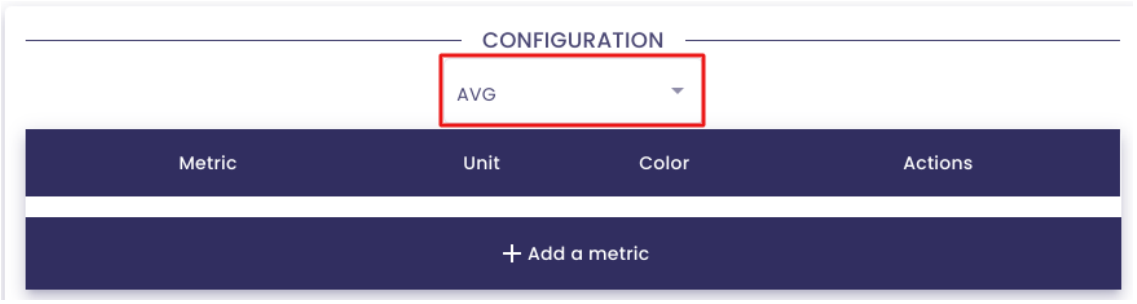


Note : the **Lock** box allows you to force the application of the selected period for this component, in case a period is chosen for the whole dashboard.



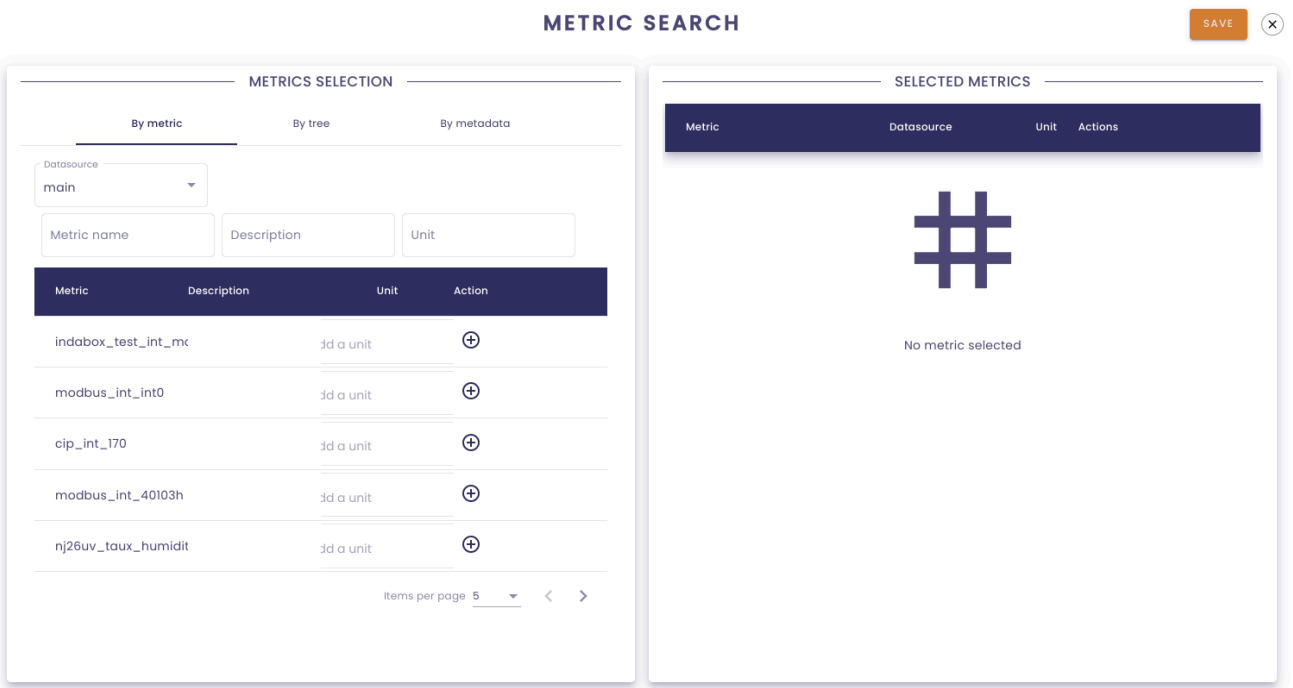
- the aggregation to apply to the values :

For example, if we want to get the average of the values of a metric, we select the aggregation '**AVG**' :



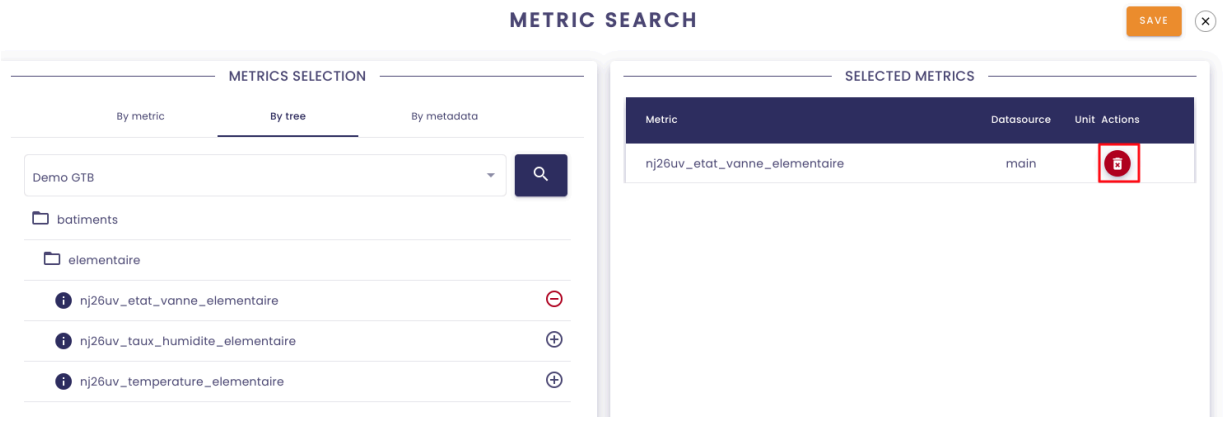
3.1.7.2 Metric

Once the general information is entered, you can select the metrics to use by clicking on the '**Search metric**' button.



The usual **io-base** metric search window. Several tabs allow a search either from the tree structure, or by meta-data, or by metric name. When you have found the right metric, click on the button to add it. The metrics appear in the table on the right.

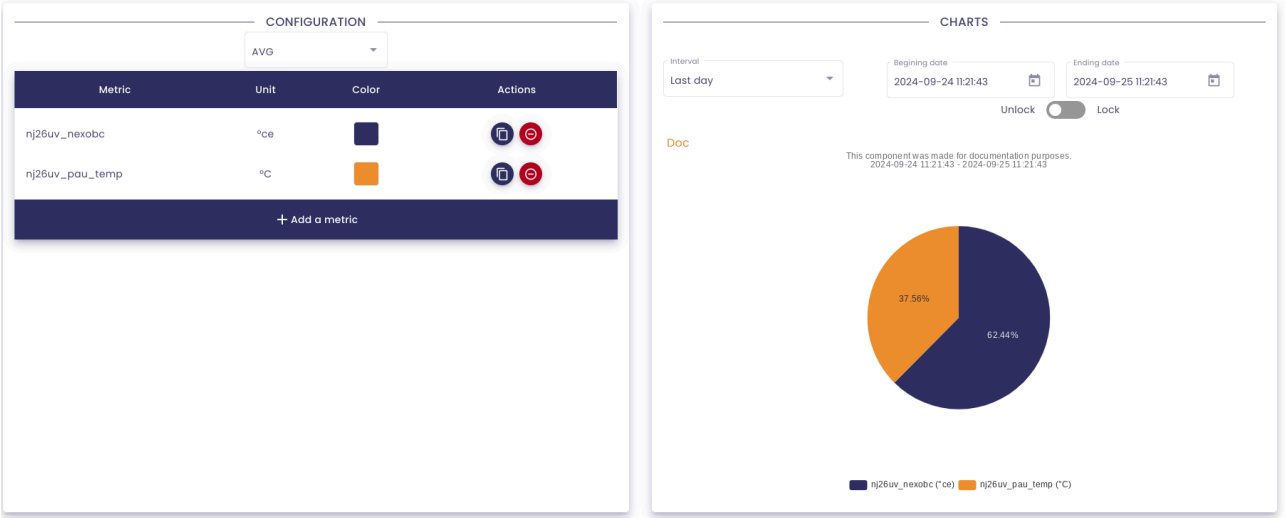
You can delete the metric from the right table by using the delete icon.



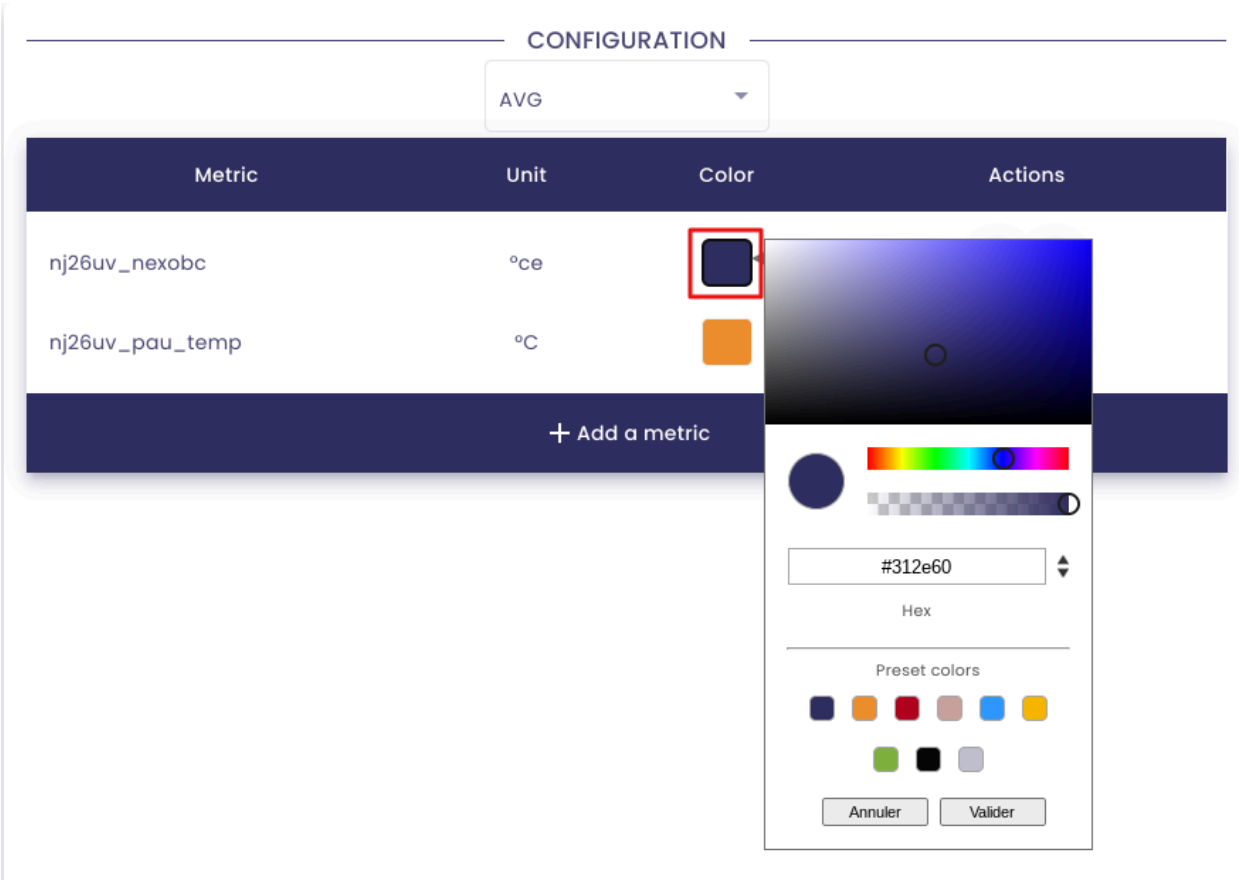
Note : for a pie chart component, it is possible to add several metrics.

To confirm the selection, click on **Save**.

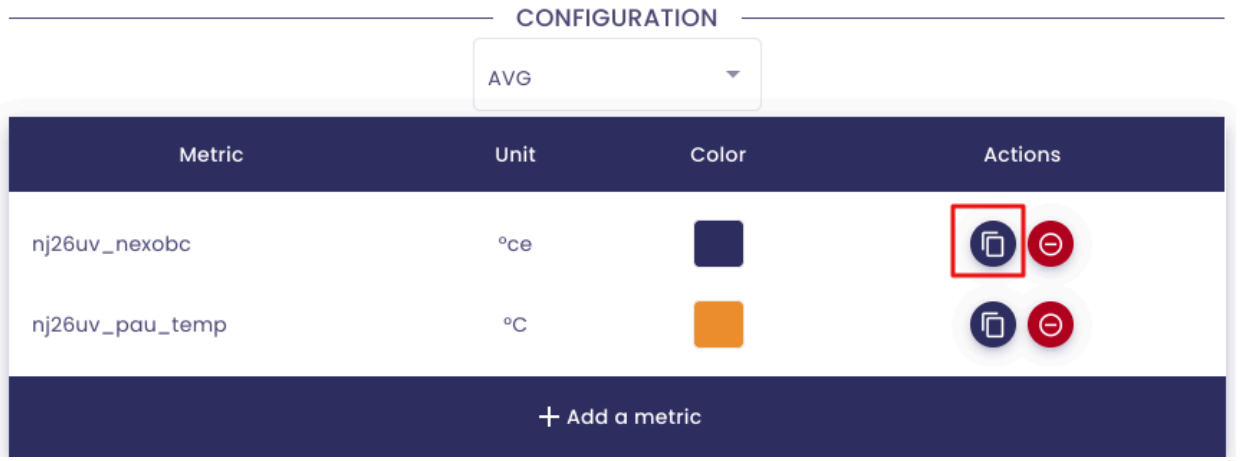
A preview of the component will appear on the right.



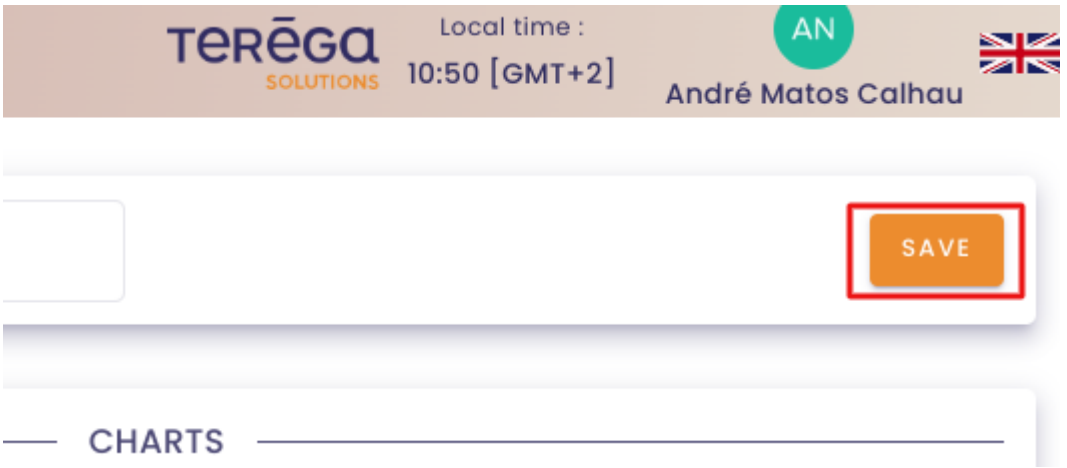
You can configure the color used for displaying the pie charts :



Each metric can be duplicated. To do so, in the **Actions** column, click on the boxed button below :



Once all the settings are complete, you can click on **Save** to save and make your component appear in the dashboard.

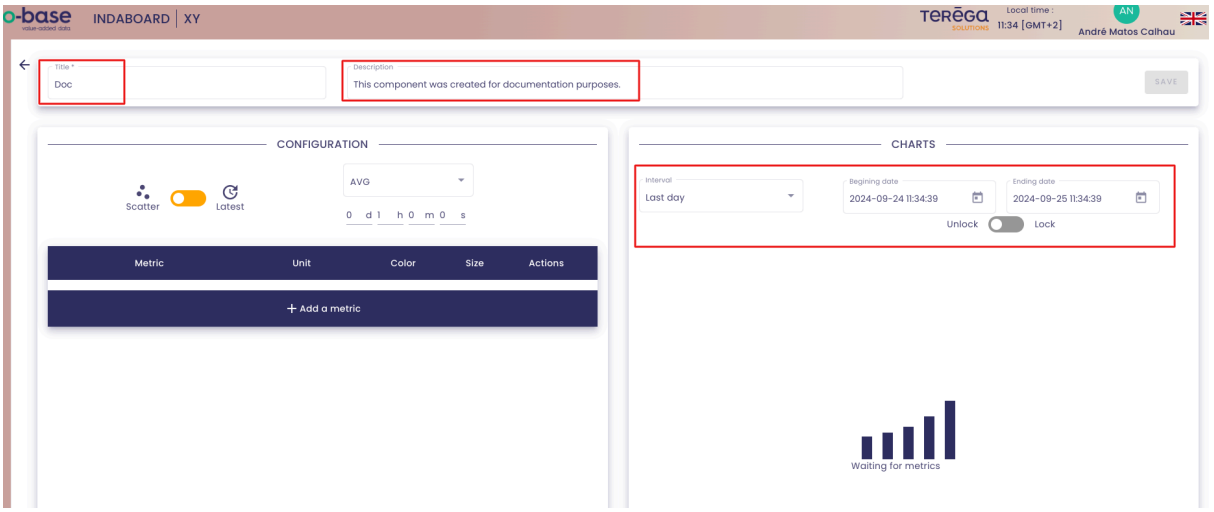


3.1.8 Creating an XY chart component

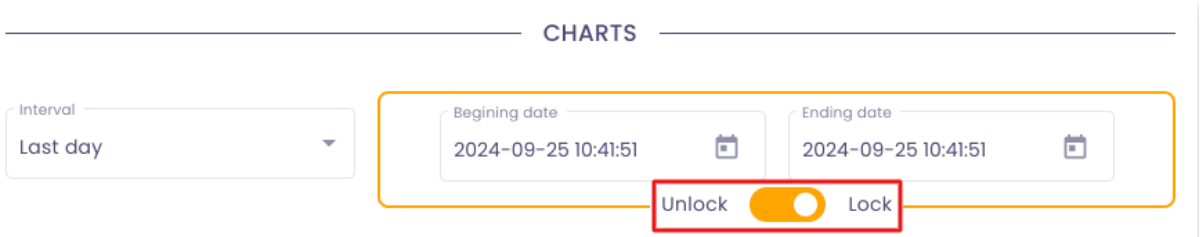
3.1.8.1 Configuration

To create an X/Y graphic component, you must start by entering the general information of the component :

- a title
- a description (optional)
- the period of the relevant data



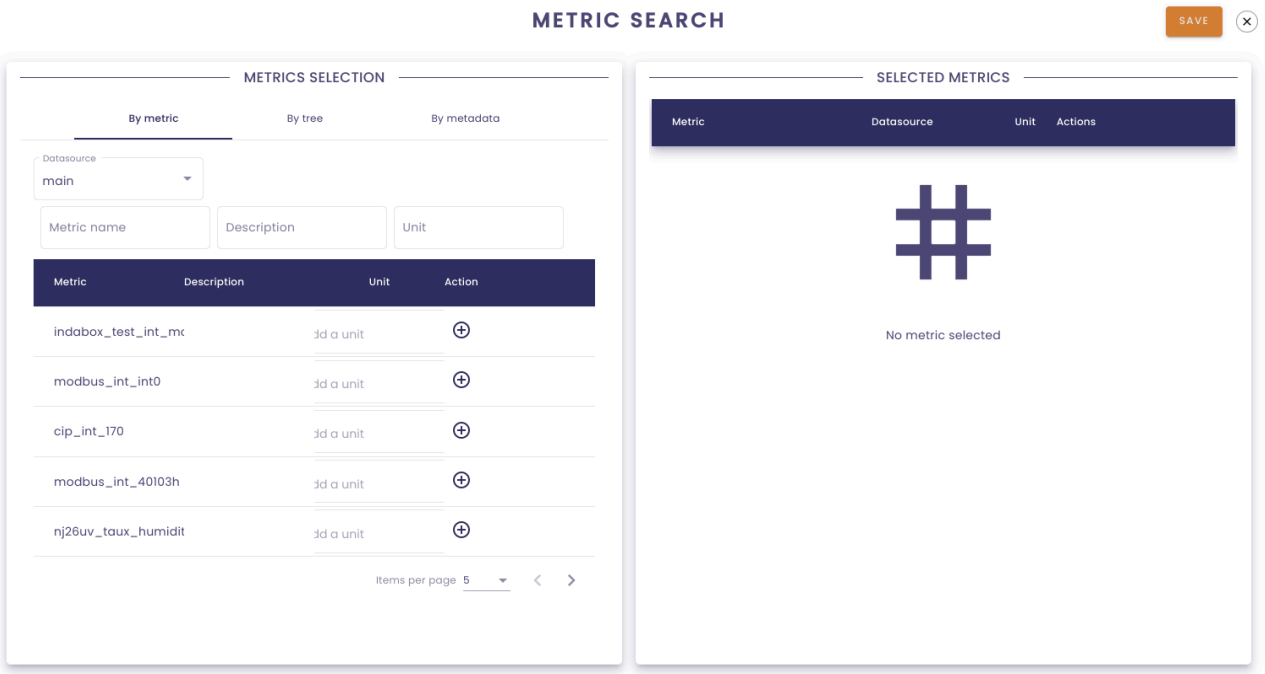
Note : the **Lock** box allows you to force the application of the selected period for this component, in case a period is chosen for the whole dashboard.



- data filter :
  - scatter plot
  - latest value

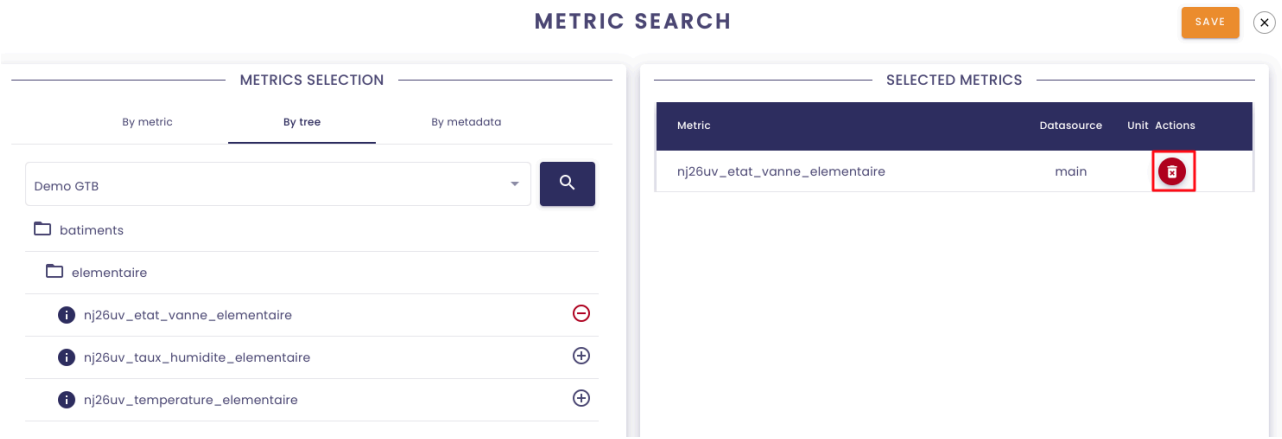
3.1.8.2 Metric

Once the general information is entered, you can select the metrics to use by clicking on the '**Search metric**' button.



The usual **io-base** metric search window. Several tabs allow a search either from the tree structure, or by meta-data, or by metric name. When you have found the right metric, click on the button to add it. The metrics appear in the table on the right.

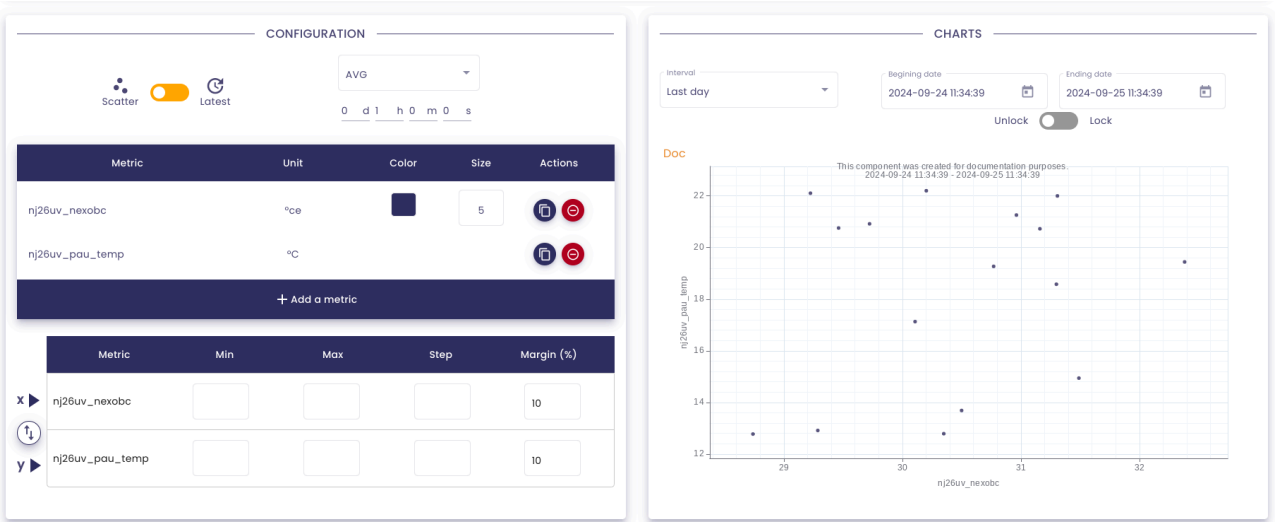
You can delete the metric from the right table by using the delete icon.



Note : for a XY chart component, you have to add two metrics.

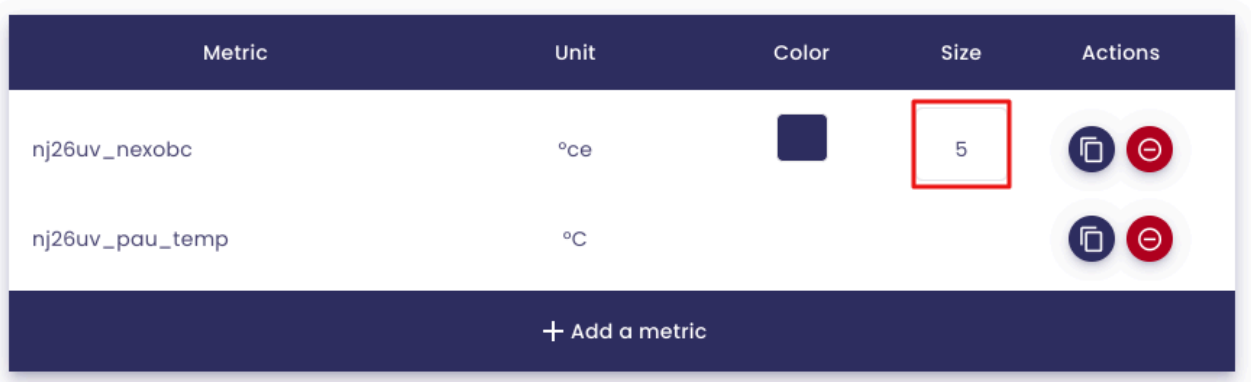
To confirm the selection, click on **Save**.

A preview of the component will appear on the right.

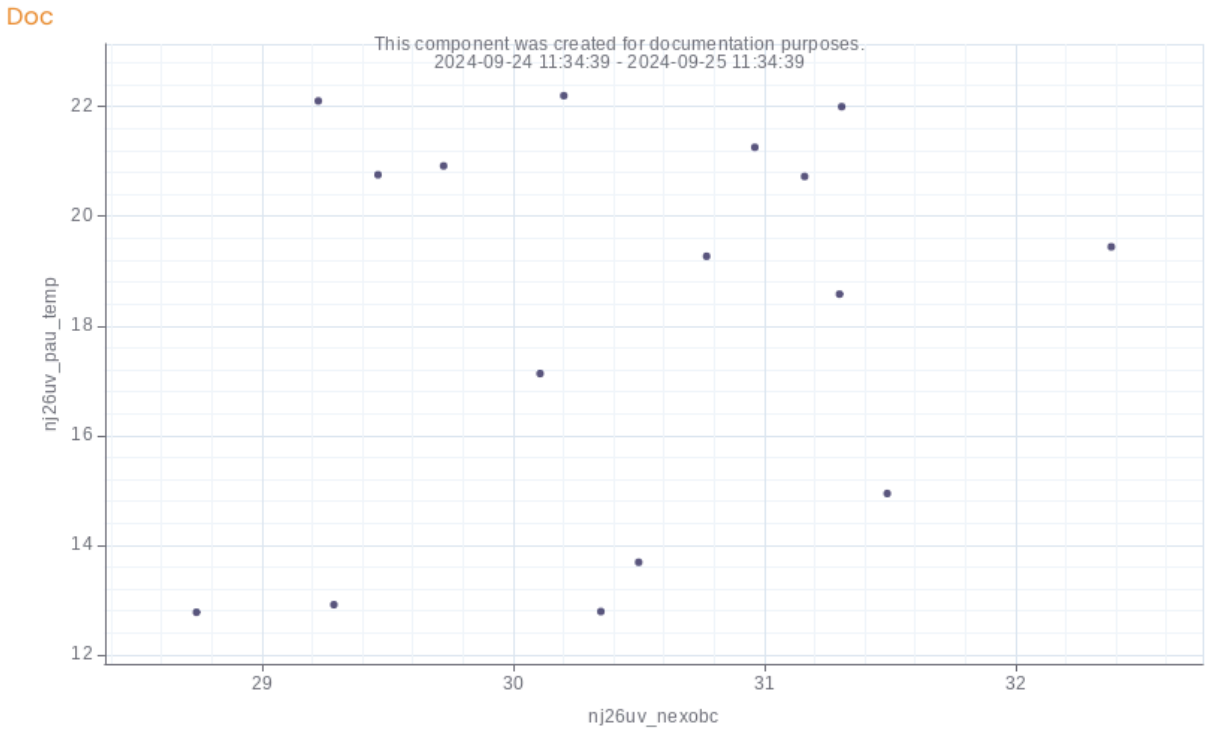


You can configure several elements in the graphic :

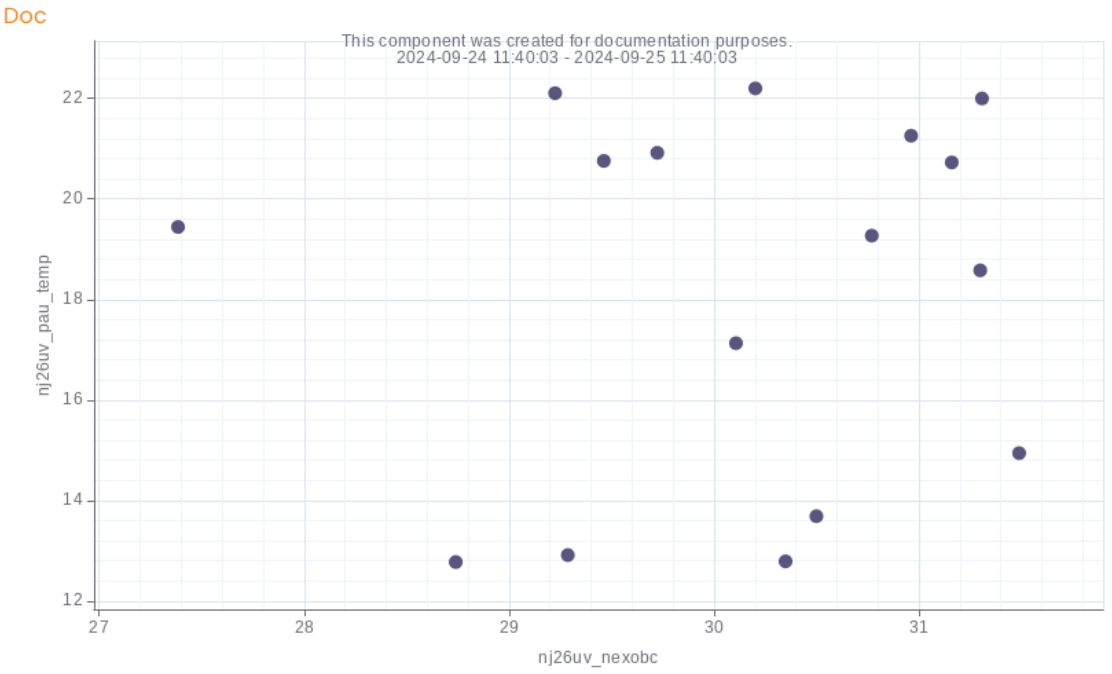
- the size of the displayed points :



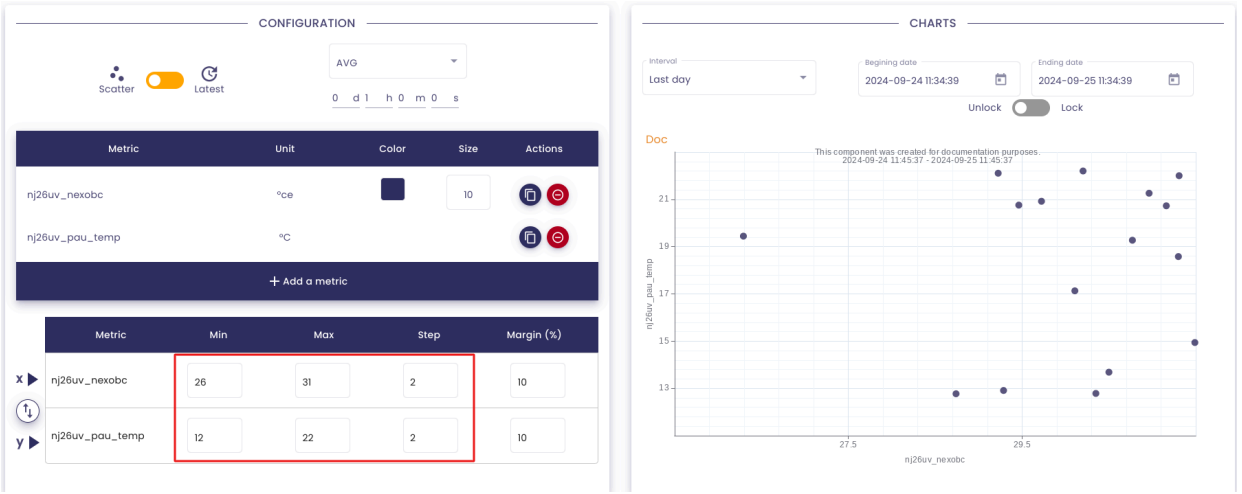
For example, if we specify size 5, the points of the component will look be :



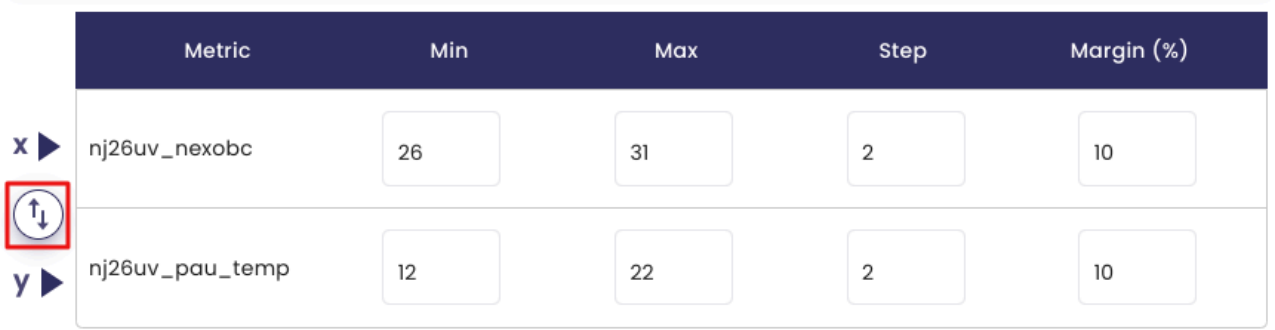
And with size 10 :



Then, for each metric, you can also enter minimum and maximum visibility values for your graphic, as well as the interval to apply for the graduations. With each change, the graphic updates on the right side to visualize the changes.



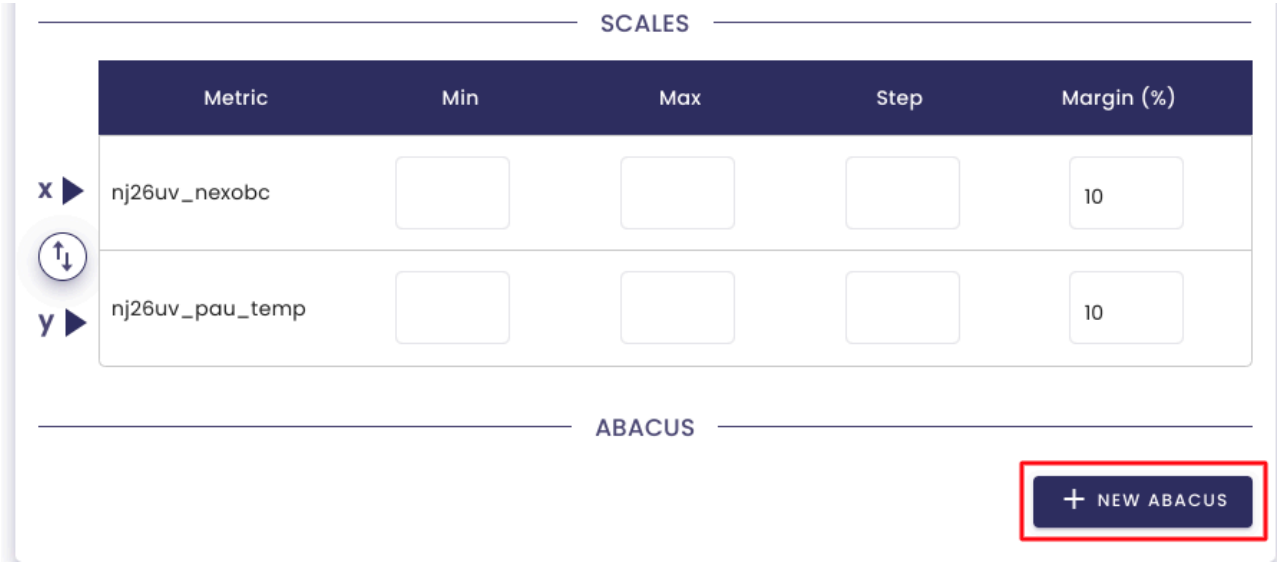
You can reverse the metrics on the y-axis / x-axis in the graphic; to do this, click on the button outlined below :



3.1.8.3 Abacus

This feature allows you to represent a specific process through a mathematical line or curve on your chart. By using a variable that represents the x-axis values, you can model relationships and easily visualize trends unique to your processes.

To add an abacus, click on "**New abacus**."



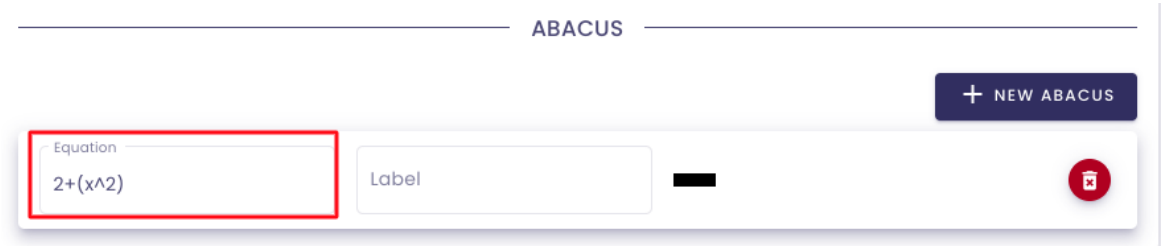
Various configuration fields will appear.

Start by entering the equation for the line you wish to display on the chart.

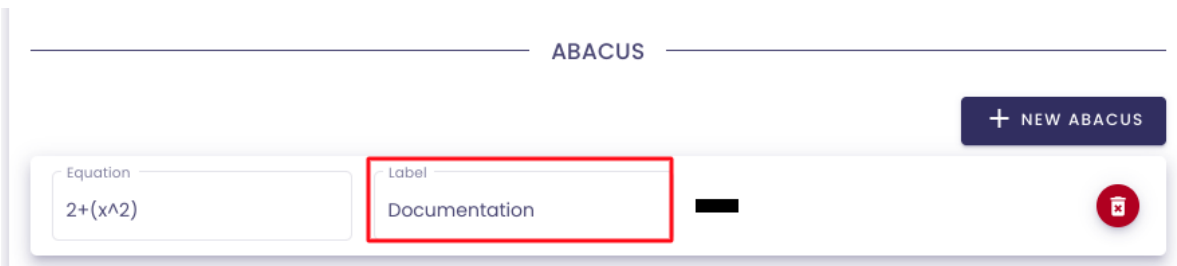
To construct your equation, you must use a variable.

Syntax : to indicate the variable representing the x-axis values, enter "**x**".

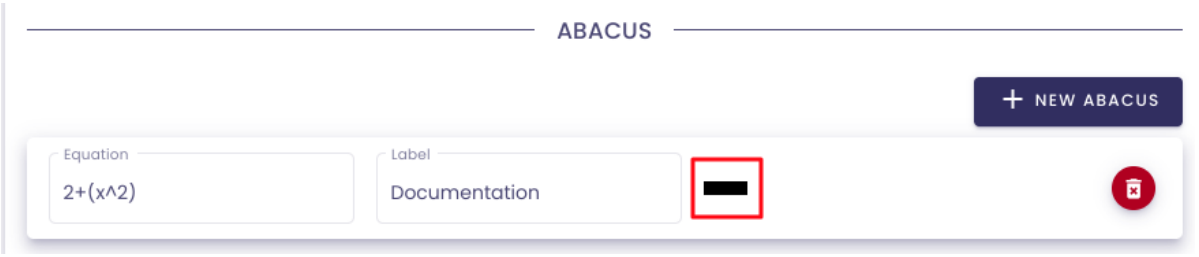
For example, the equation can be 2+(x^2).



Provide a label for your variable :

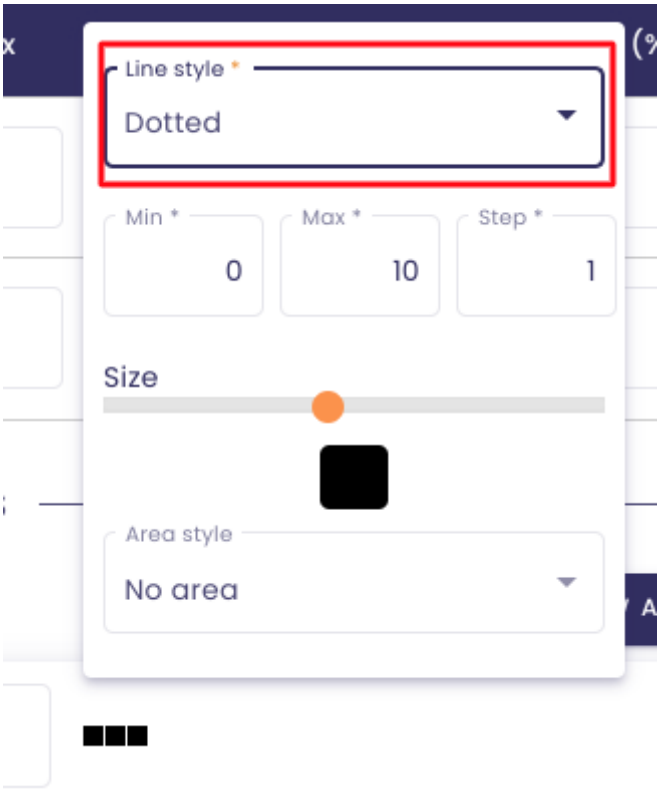


Next, click on the icon representing your line to configure it :

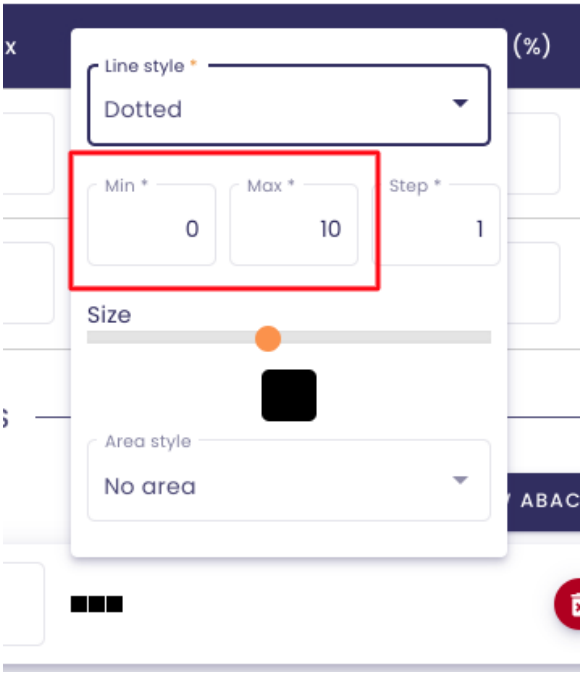


You can then set up :

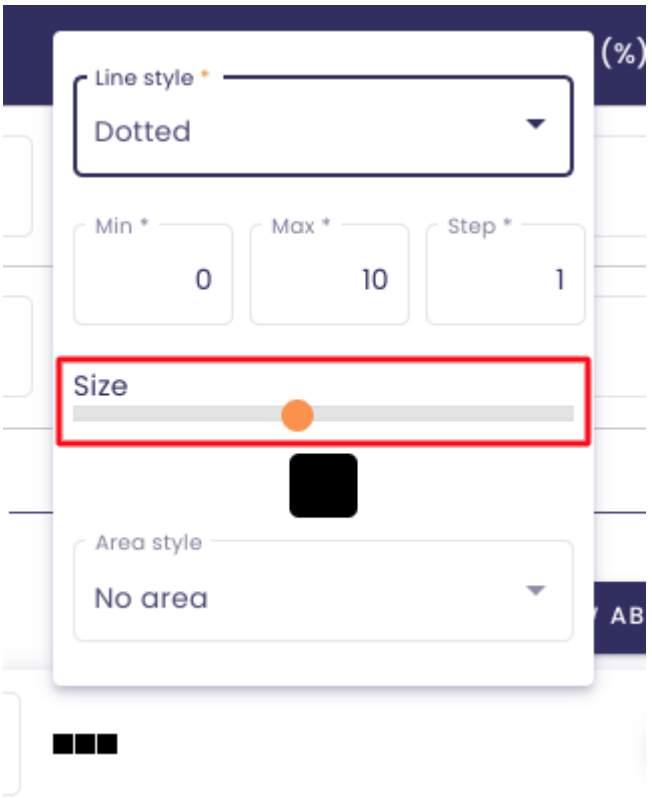
- The line **style** : line or dotted



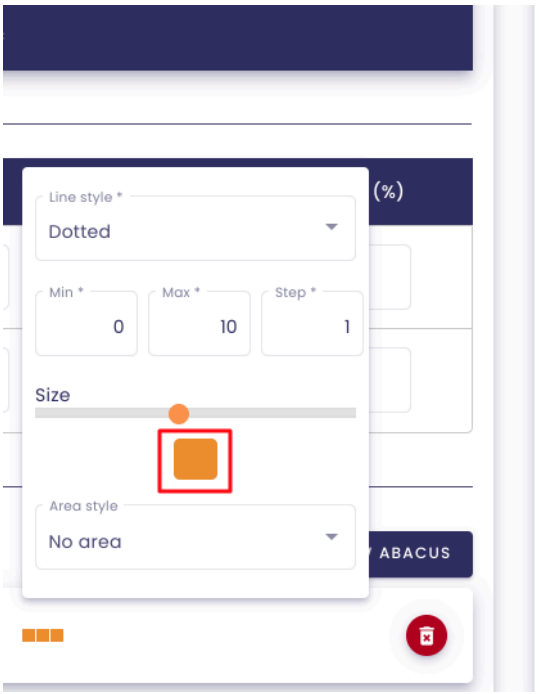
- The **minimum and maximum** values that your variable "x" should take (x-axis values). For example, if you enter min = 0 and max = 10, the curve for 2*x will be plotted for the interval x [0;10].

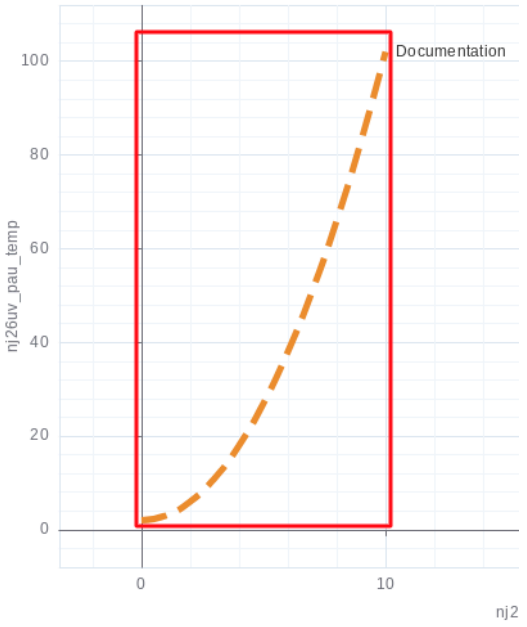


- The curve **thickness** : allows you to define the line's thickness on the chart.



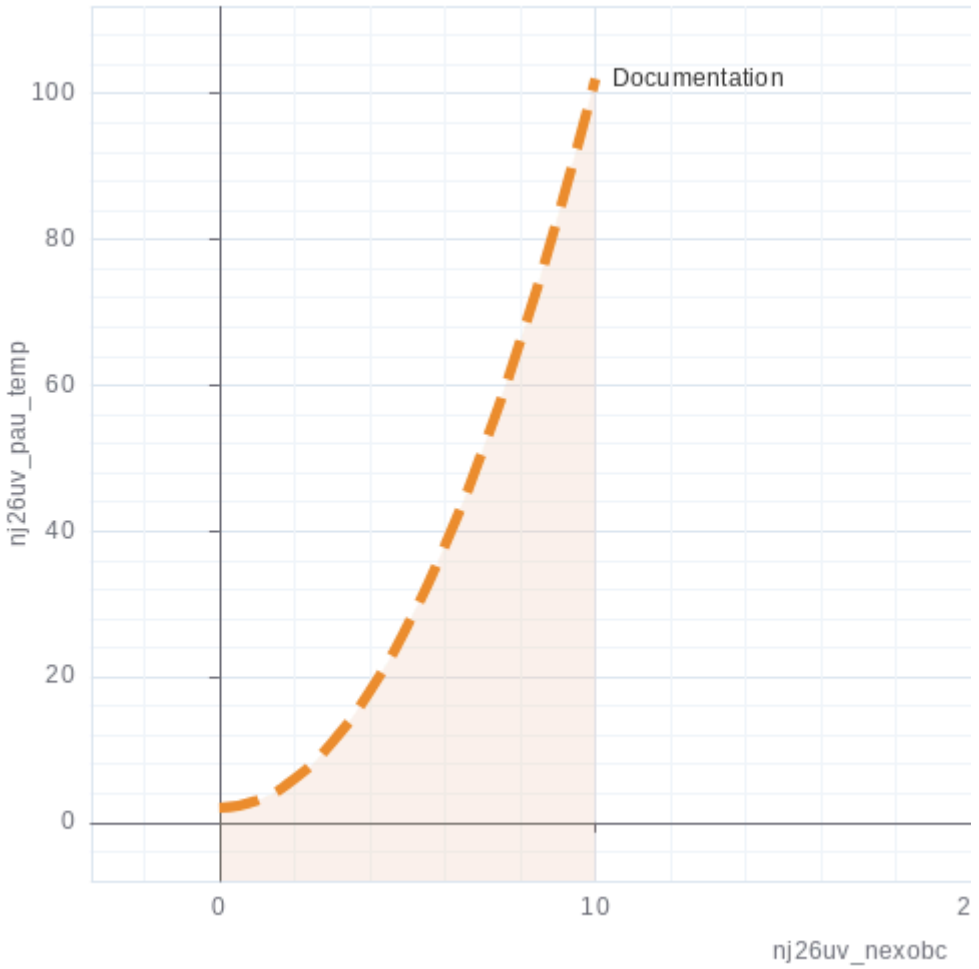
- The curve **color** :



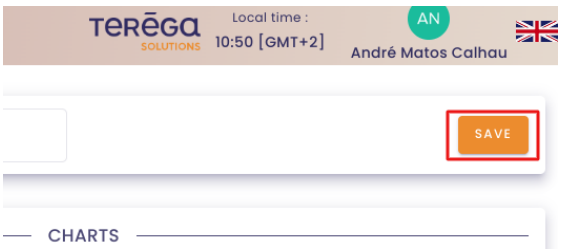


- The **area style** : you can choose whether to display the area under the curve, either upwards or downwards.

Once these parameters are set, the equation's curve will appear :



Once all the settings are complete, you can click on **Save** to save and make your component appear in the dashboard.



3.1.9 Creating a text component

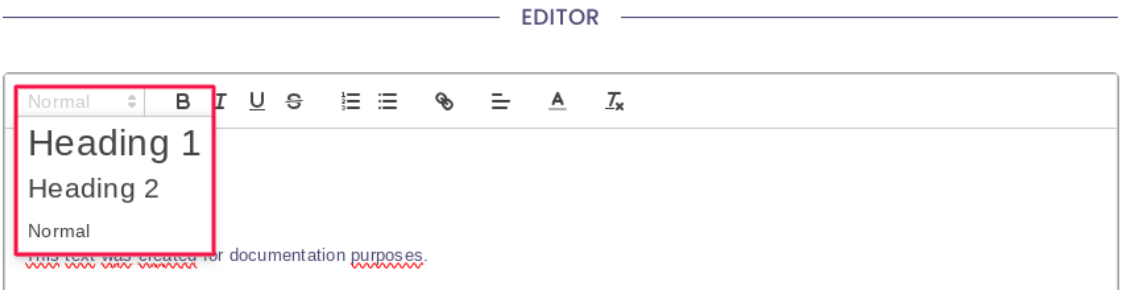
You can create a “text” component to add text or links to your dashboard.

3.1.9.1 Apply a heading style

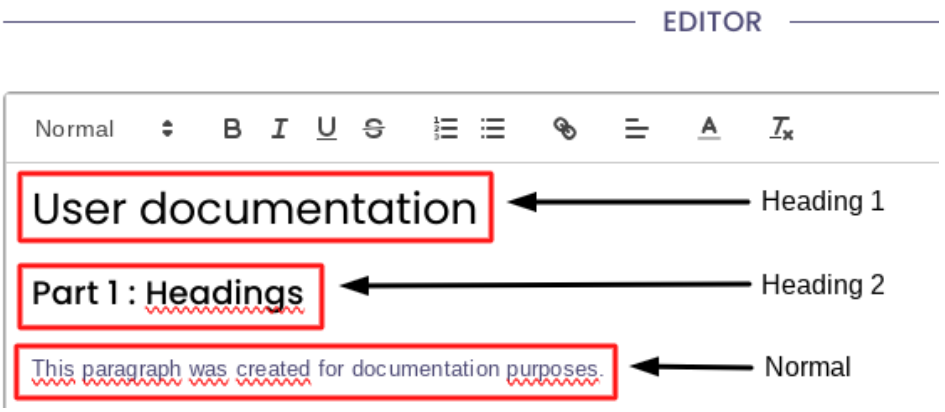
Choose from three text styles :

- Heading 1 : Main title
- Heading 2 : Subtitle
- Normal : Regular text

Select the text you want to style and choose the appropriate option from the toolbar.

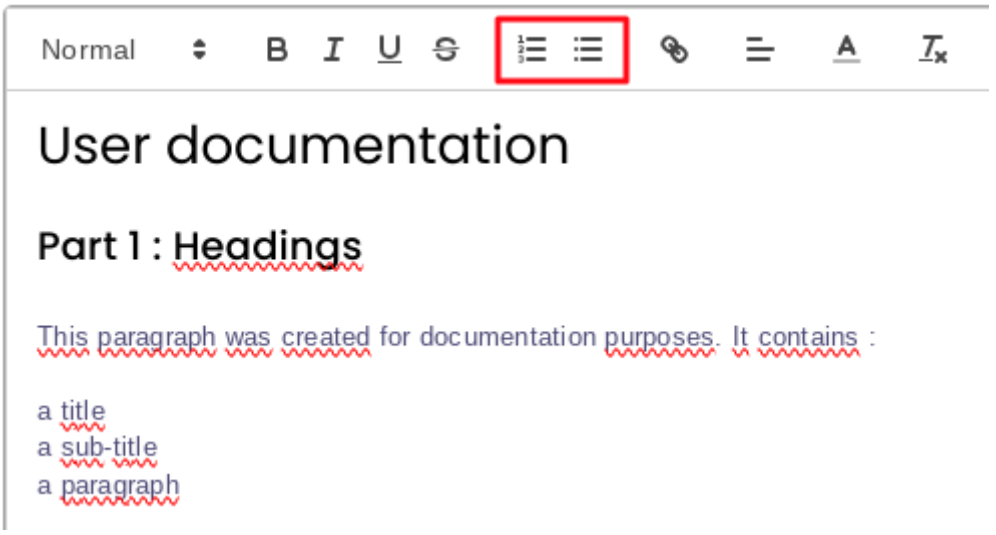


The text will automatically update based on the selected style.

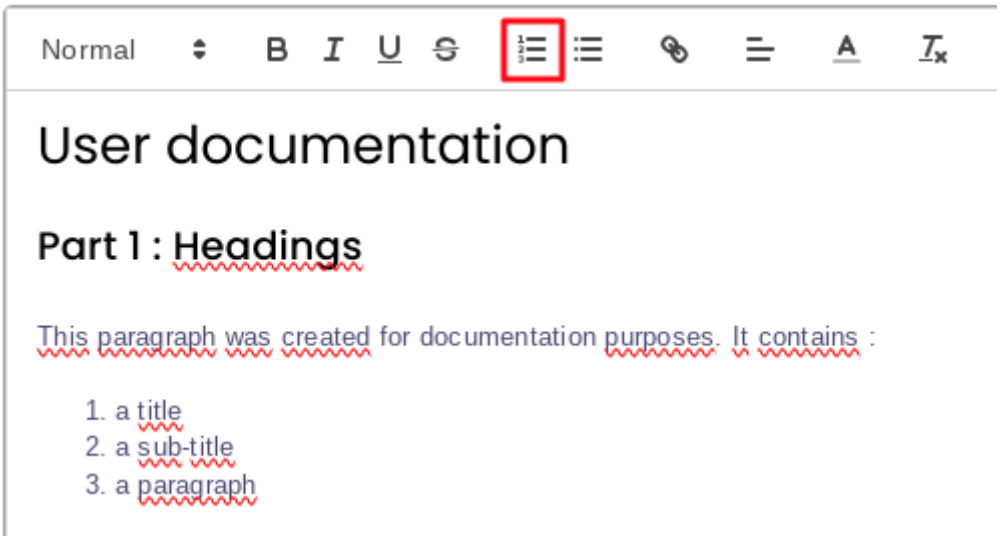


3.1.9.2 Creating lists

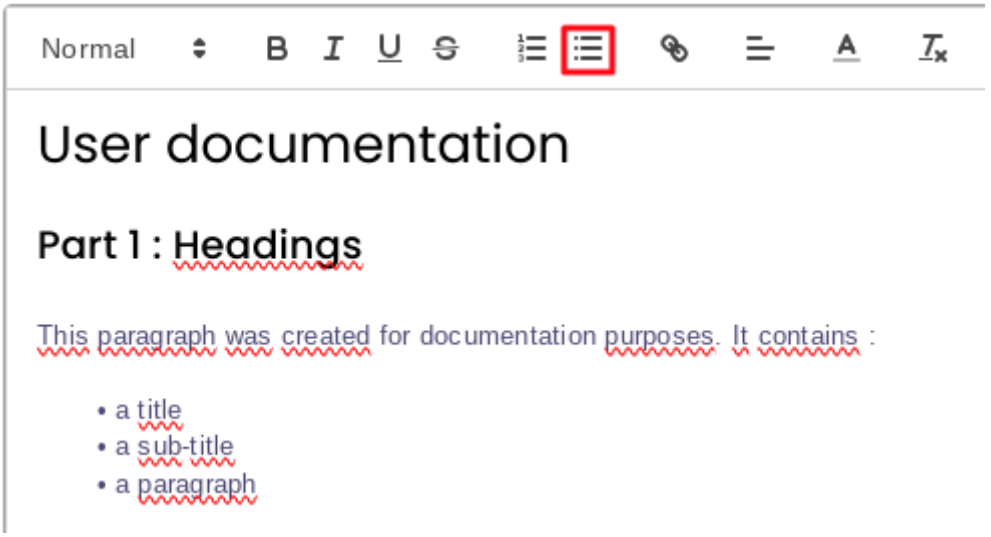
You can create two types of lists using the toolbar :



Numbered list :



Bulleted list :



3.1.9.3 Text formatting

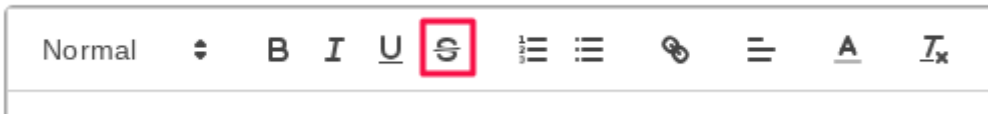
You have several options for formatting your text :

- **bold text** :

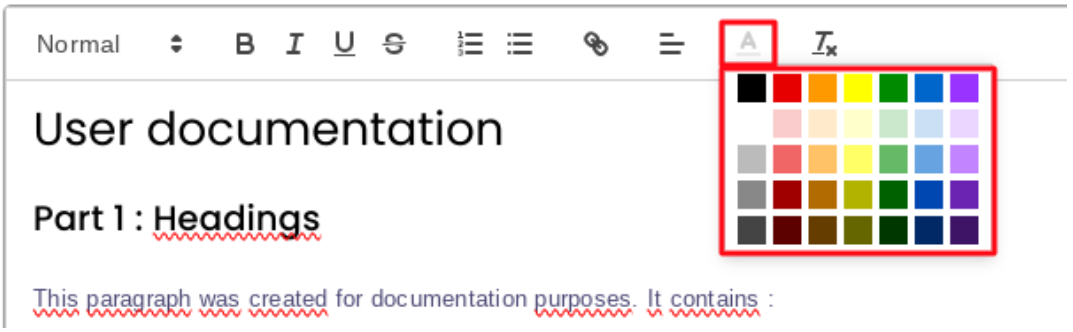
- **italic** :

- **Underline** :

- **Strikethrough** :



- **change the text color** :



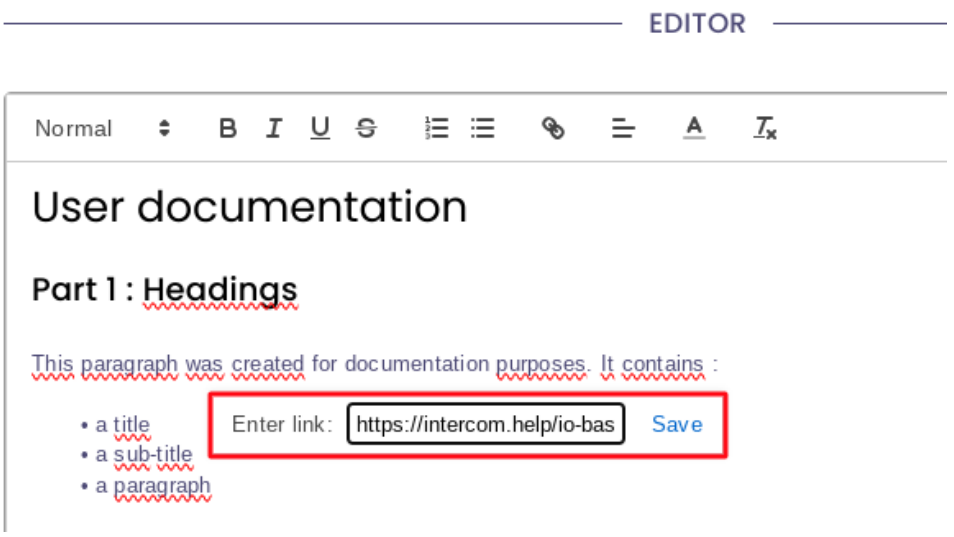
3.1.9.4 Add a link

To add a link, follow the procedure below.

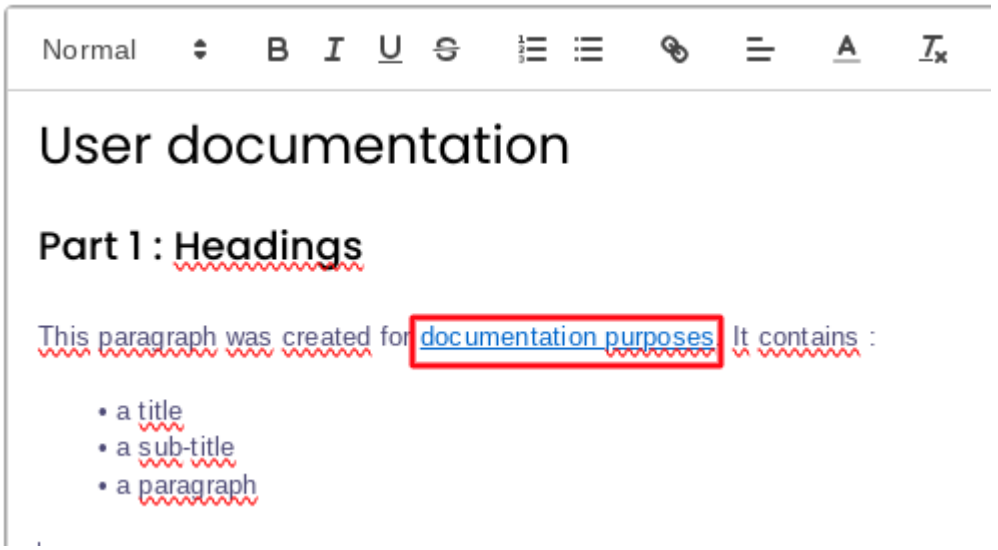
Select the part of the text where you want the link to appear.

Click the **link button** in the toolbar.

Enter the URL in the input field and click "**Save**".

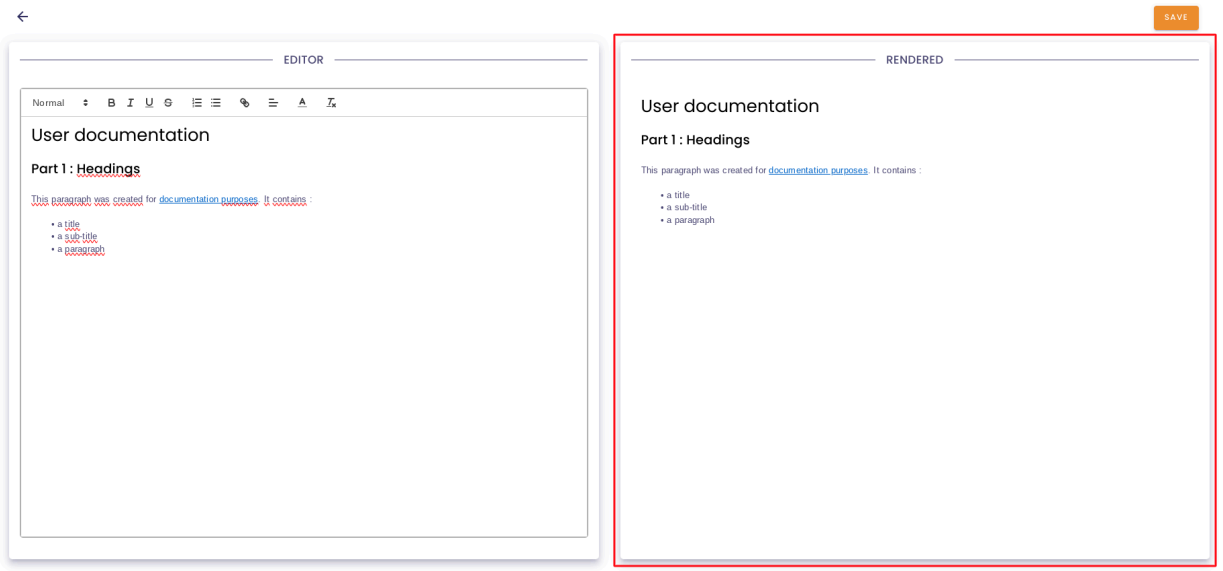


Your link is created :

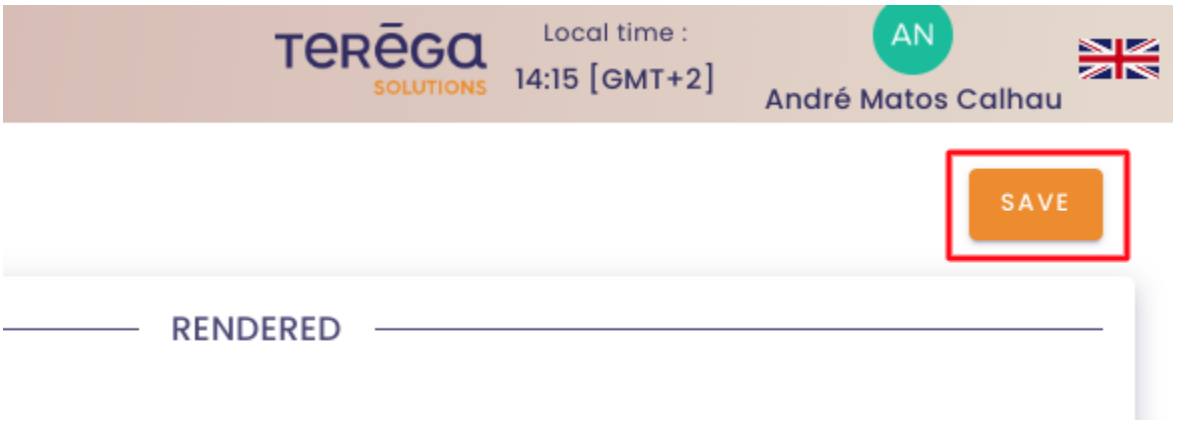


3.1.9.5 Preview your component

A preview of your component will appear on the right.

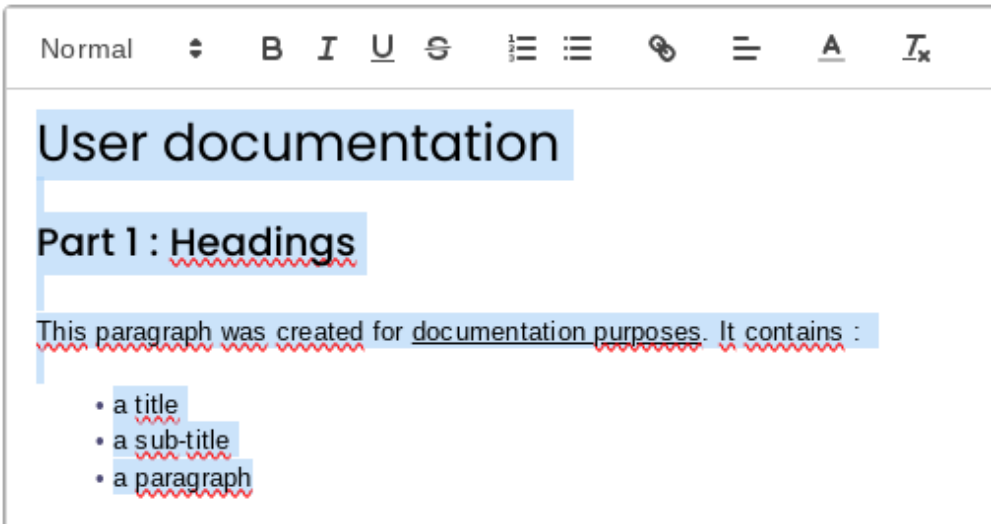


Once you are satisfied with the result, click "**Save**" in the top-right corner to add it to your dashboard.

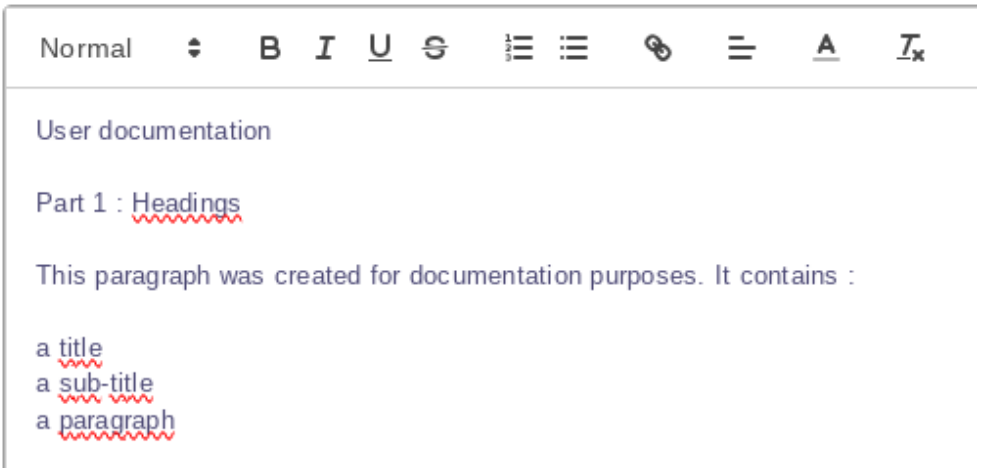


3.1.9.6 Removing formatting

To remove formatting, click the clear formatting button from the toolbar.



The text will return to the default style.



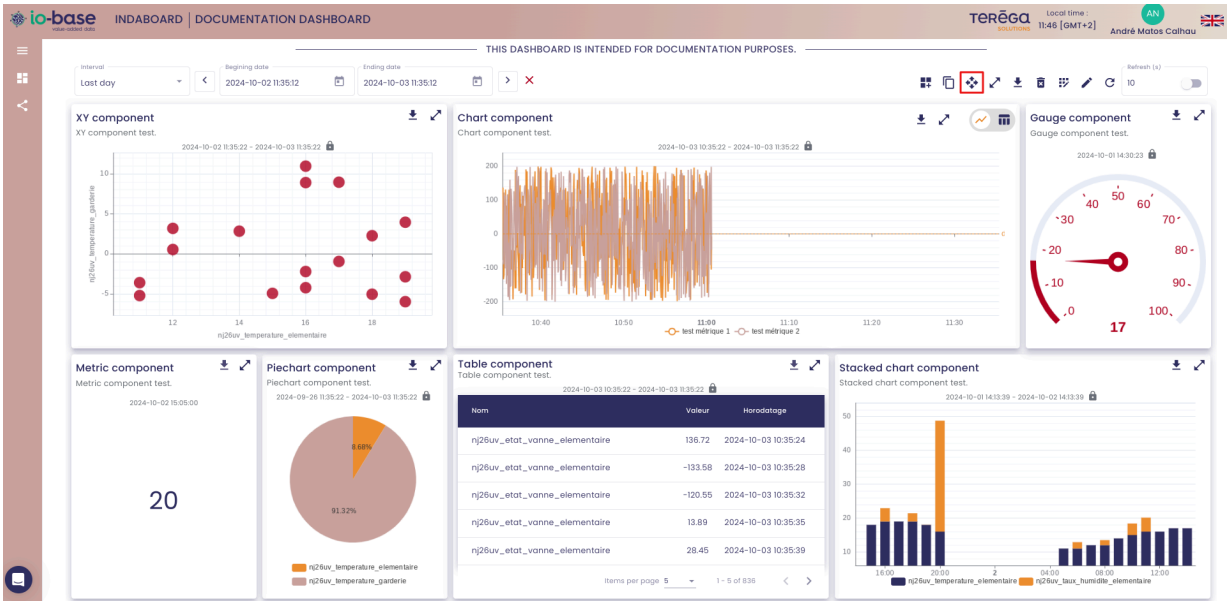
3.2. Organize the components of a dashboard

3.2.1 Prerequisites

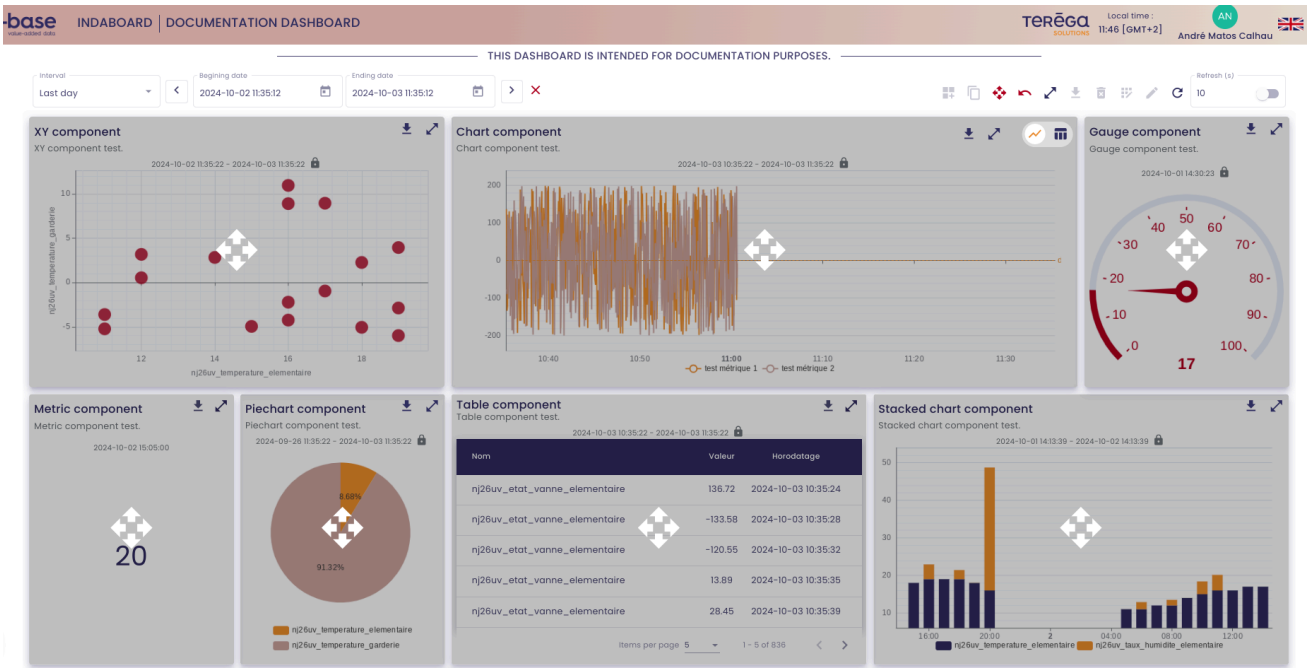
Connect to IndaBoard from the io-base portal. From the My dashboards menu, view a dashboard.

3.2.2 Arranging a dashboard

It is possible to move and manage the size of the components on a dashboard. The Move mode must be activated.

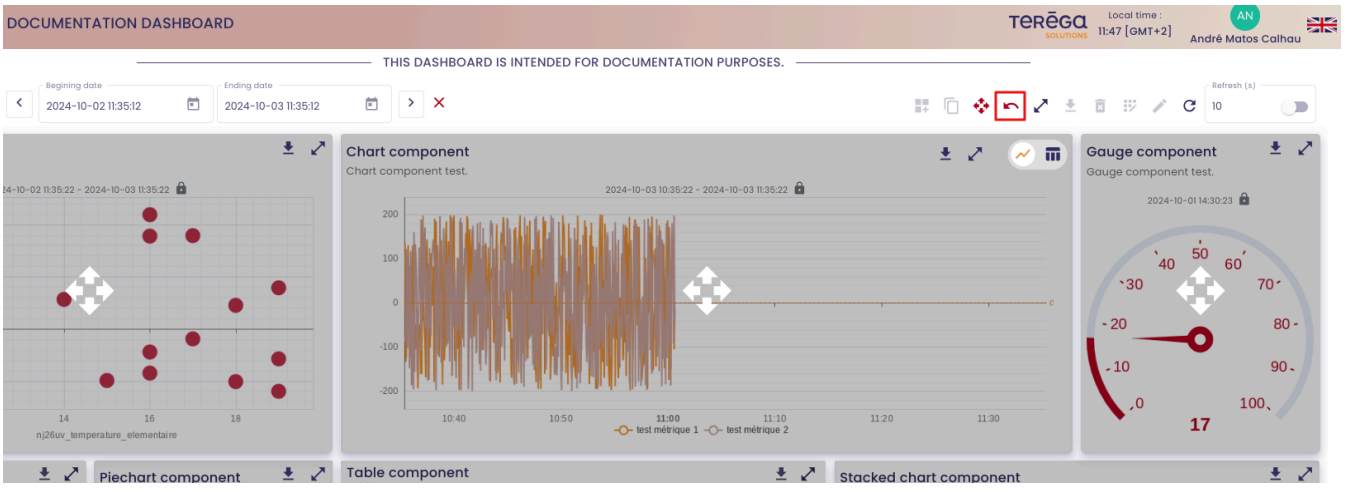


A cross icon appears on each component. This will allow you to move the component to any desired location on the dashboard. The dashboard is to be seen as a grid, with rows and columns. By resizing the components, you can move them to more or less rows or columns.

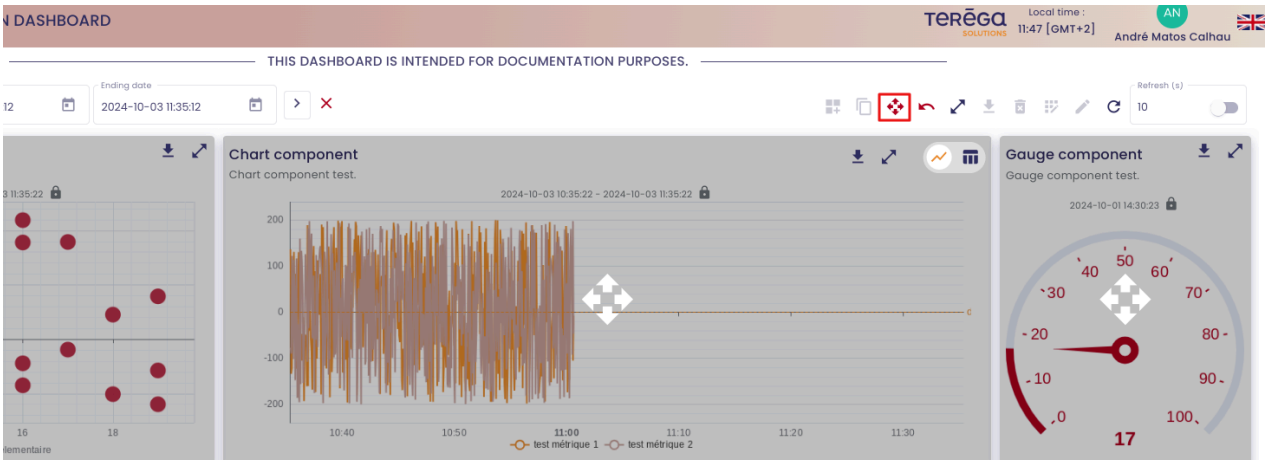


- each component can be moved using drag and drop
- the size of each component can be adjusted, by positioning on the desired side and stretching with the mouse in the desired direction

Note : if you wish to cancel a change, you can do so using the Back arrow.



Once you have made the desired changes, you can deactivate the layout mode by clicking on the move icon again.



The changes are saved and you are back on the dashboard.

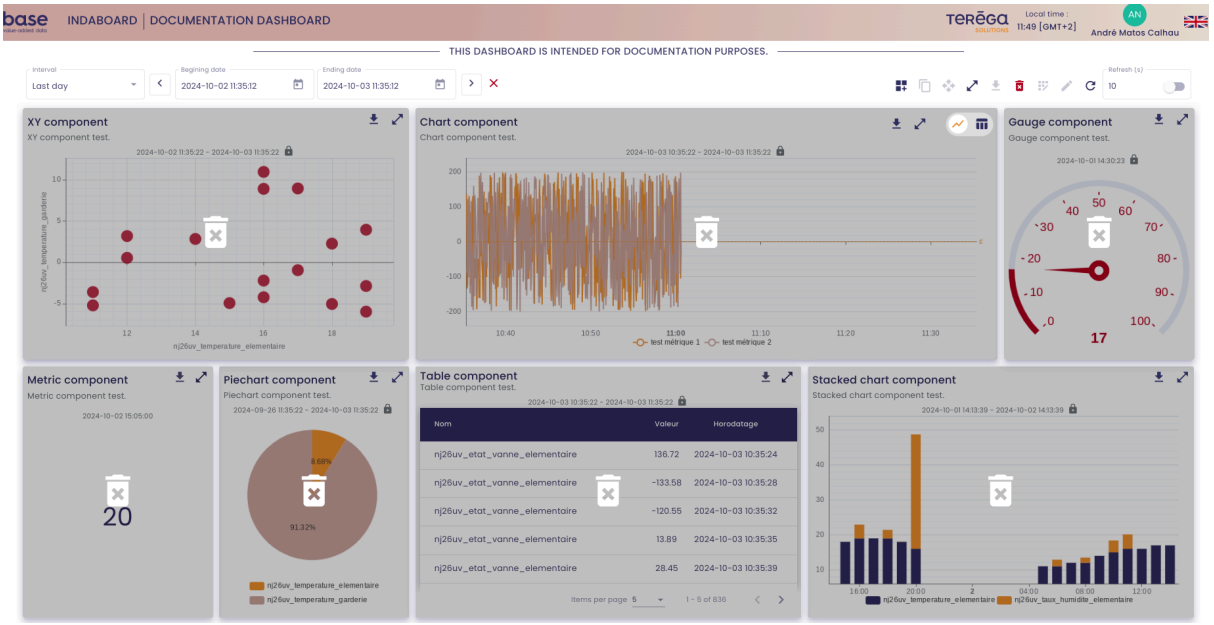
3.3. Delete a component from a dashboard

3.3.1 Prerequisites

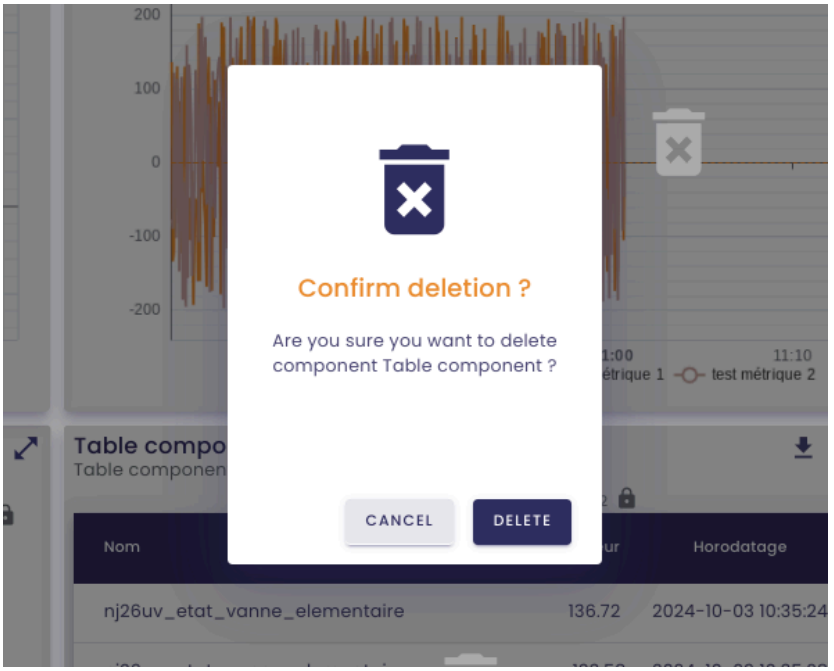
Connect to **IndaBoard** from the **io-base** portal.
From the **My dashboards** menu, view a dashboard.

3.3.2 Delete a component

A recycle bin appears on all dashboard components.

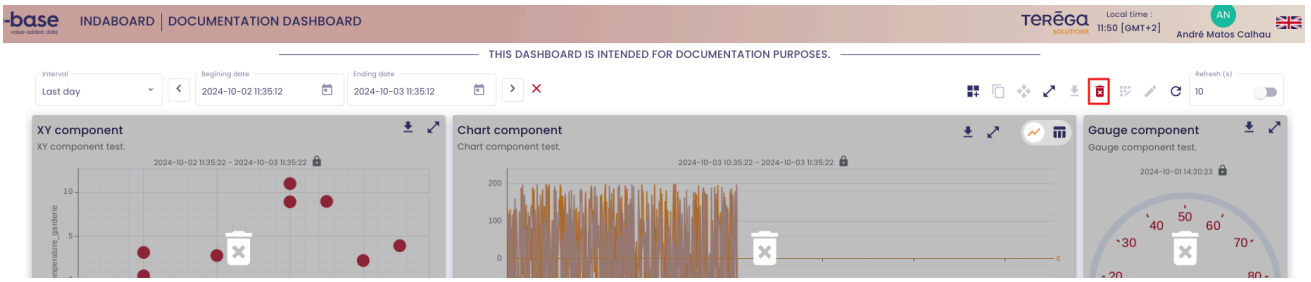


Click on the component to be deleted. A confirmation message appears.



Click on Delete to confirm the deletion.
The component disappears from the dashboard.

To deactivate the delete mode, click again on the bin icon in the upper right corner.



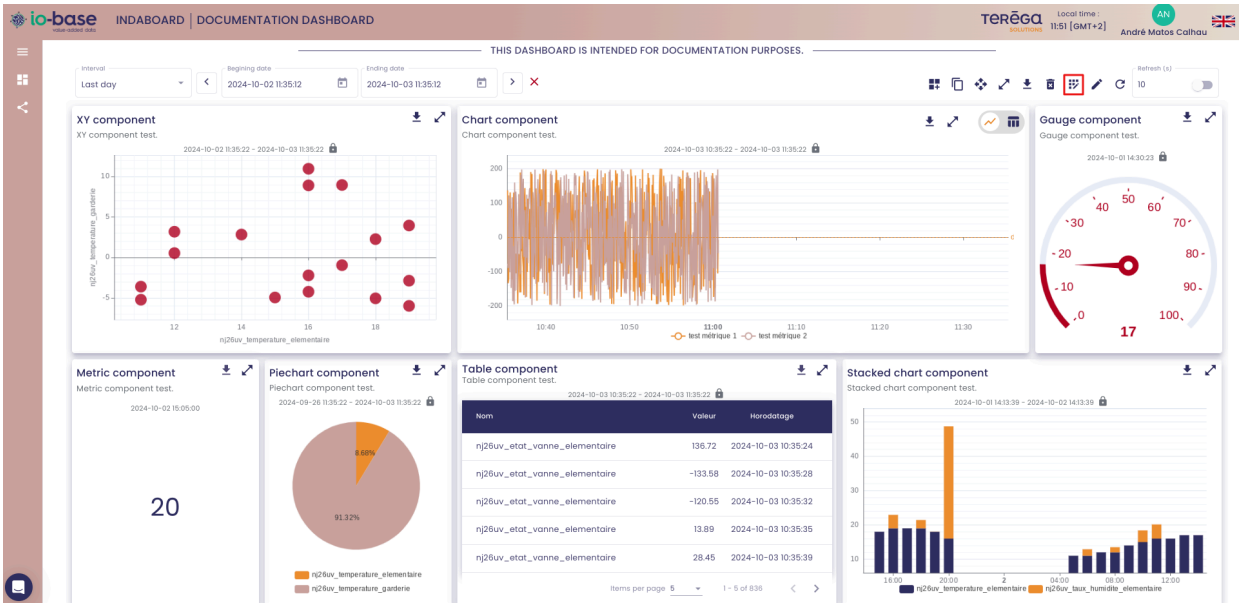
3.4. Editing a component of a dashboard

3.4.1 Prerequisites

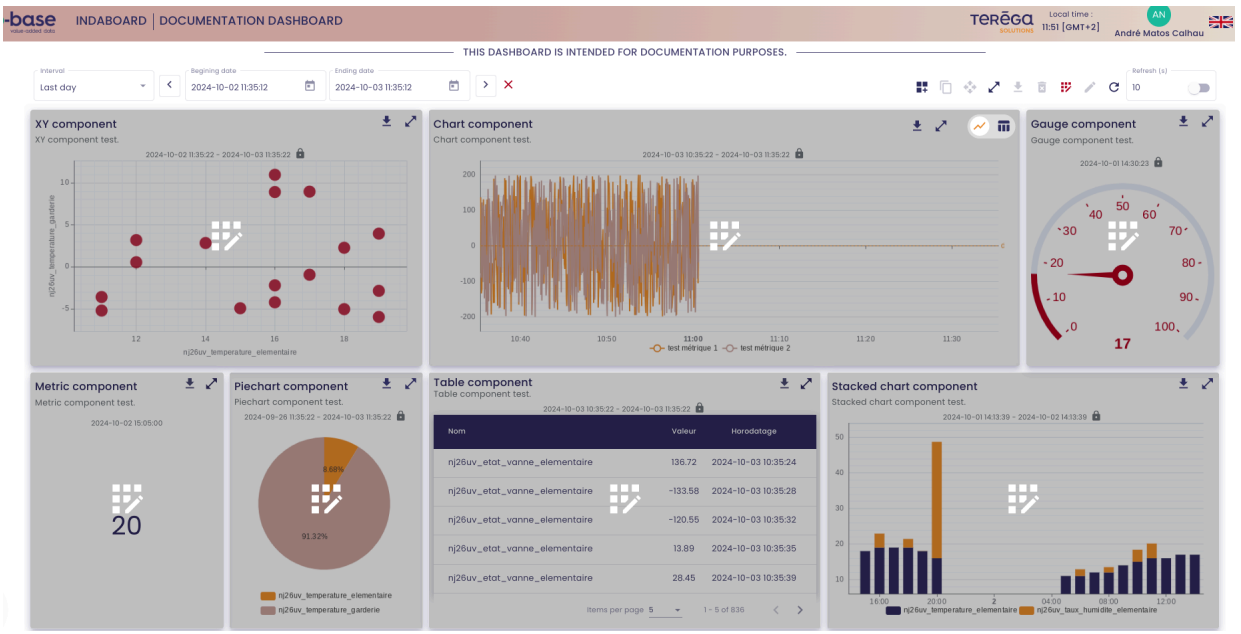
Connect to IndaBoard, from the io-base portal. Through the My Dashboards menu, view a dashboard.

3.4.2 Editing a component

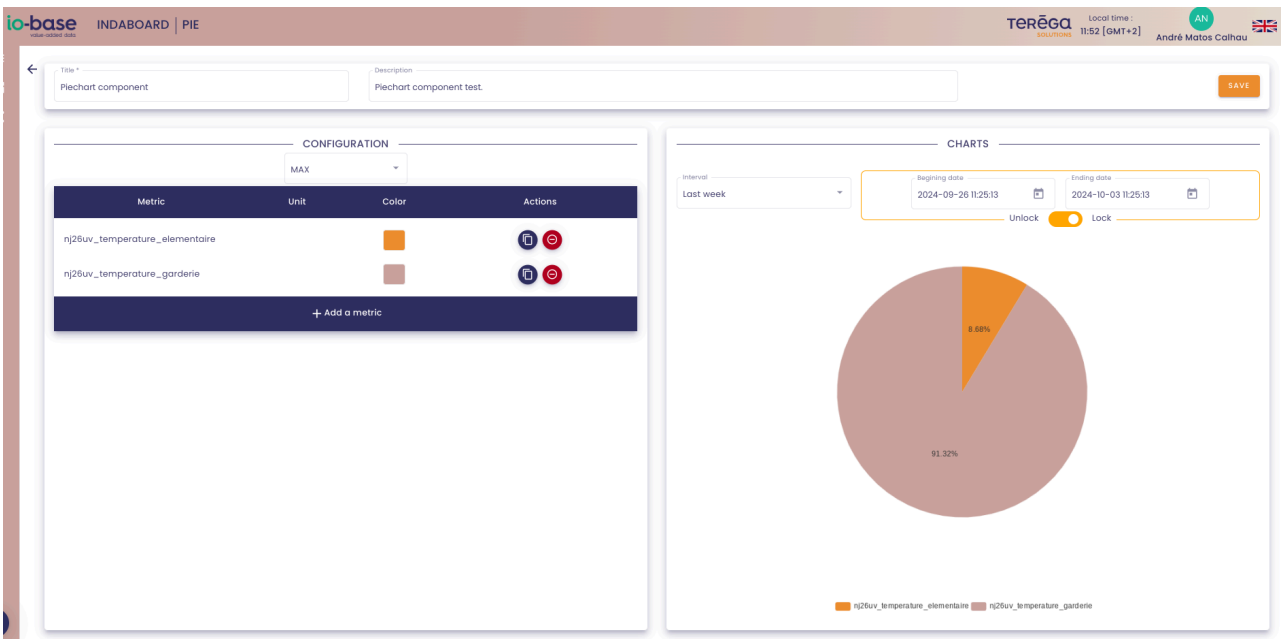
To edit a component of a dashboard, switch to Edit mode from the button at the top right.



An edit icon appears on all components of the dashboard. Click on the component to be modified.



The component settings page is displayed. You can make the desired changes, then **Save**.



The changes are saved, and you are back on the dashboard.

3.5. Duplicate a dashboard's component

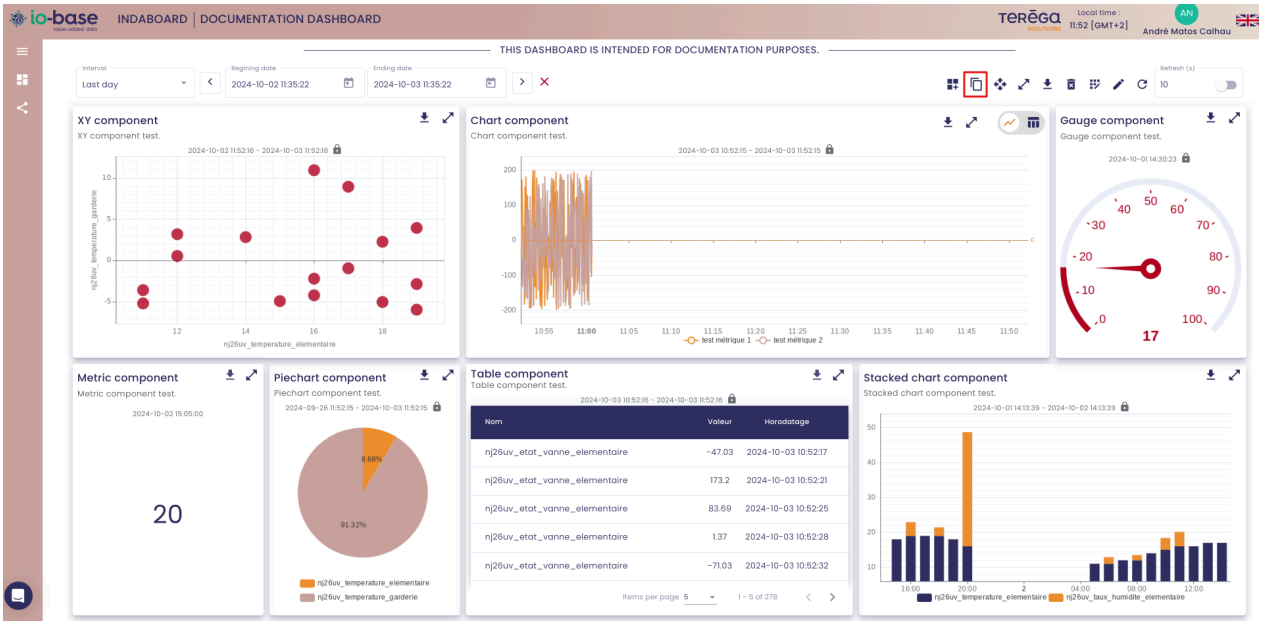
You have the option to duplicate a component directly from your dashboard.

Follow the steps below :

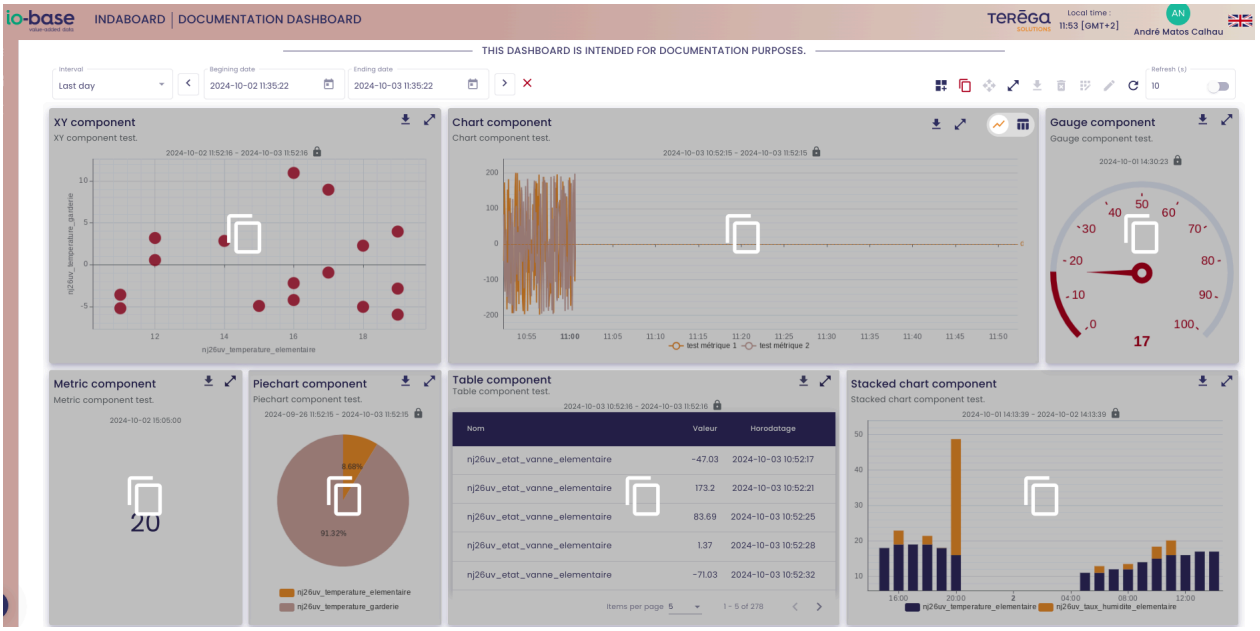
Log in to **IndaBoard** from the **io-base** portal.

From the **My Dashboards** menu, view a dashboard.

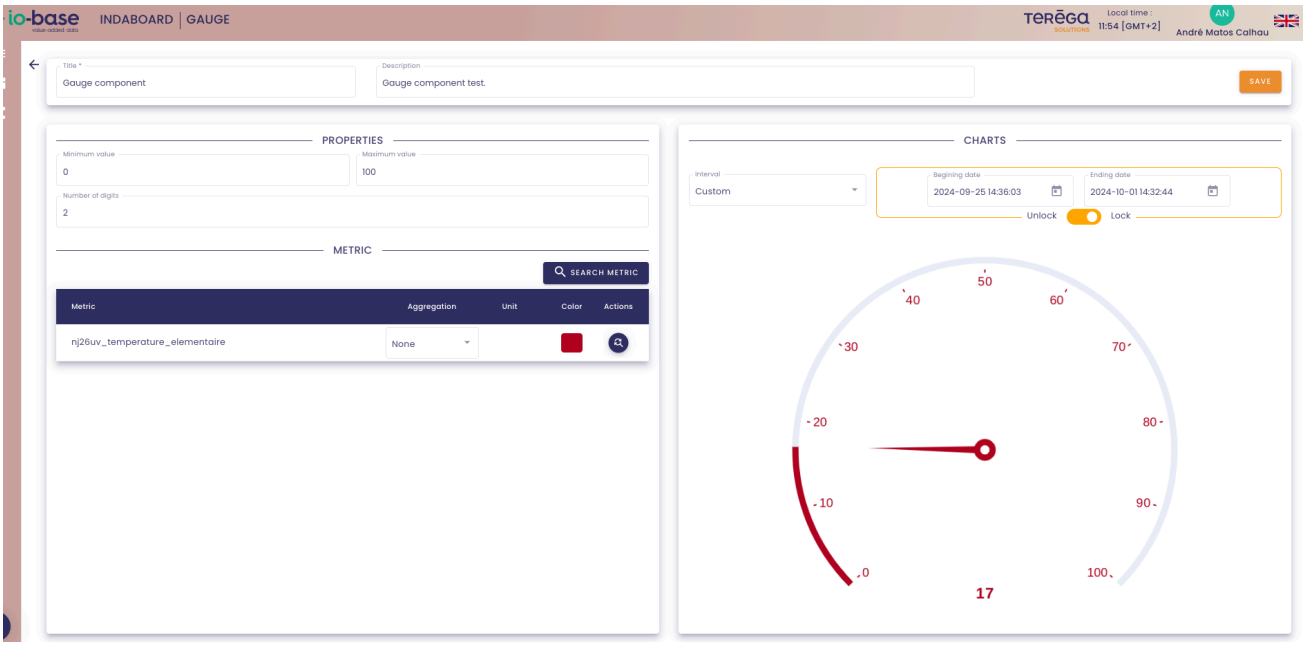
At the top right of your screen, an icon (highlighted below) is available to allow you to duplicate a component.



Click on the icon

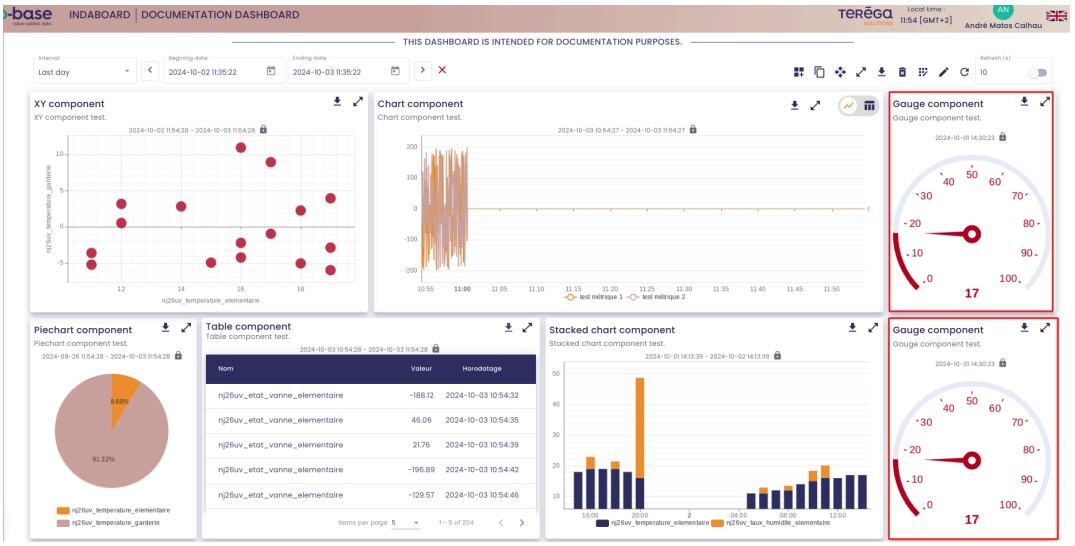


Click on the component to be duplicated. You will be redirected to the component creation page. All fields are pre-filled with the values of the duplicated component.



Click on **Save**.

Your component is duplicated.


INDABOARD | DOCUMENTATION DASHBOARD
Local time : 11:54 [GMT+2]
André Matos Calhau
THIS DASHBOARD IS INTENDED FOR DOCUMENTATION PURPOSES.
Interval
Last day
Beginning date
2024-10-02 11:35:22
Ending date
2024-10-03 11:35:22
Refresh (s)
10
XY component
XY component test.
2024-10-02 11:54:28 - 2024-10-03 11:54:28
nj26uv_temperature_jardinerie
nj26uv_temperature_elementaire
Chart component
Chart component test.
2024-10-03 10:54:27 - 2024-10-03 11:54:27
test métrique 1
test métrique 2
Gauge component
Gauge component test.
2024-10-01 14:30:23
17
Piechart component
Piechart component test.
2024-09-26 11:54:28 - 2024-10-03 11:54:28
8.68%
91.32%
nj26uv_temperature_elementaire
nj26uv_temperature_garderie
Table component
Table component test.
2024-10-03 10:54:28 - 2024-10-03 11:54:28
Nom
Valeur
Horodatage
nj26uv_etat_vanne_elementaire -188.12 2024-10-03 10:54:32
nj26uv_etat_vanne_elementaire 46.06 2024-10-03 10:54:35
nj26uv_etat_vanne_elementaire 21.76 2024-10-03 10:54:39
nj26uv_etat_vanne_elementaire -196.89 2024-10-03 10:54:42
nj26uv_etat_vanne_elementaire -129.57 2024-10-03 10:54:46
Items per page: 5
1 - 5 of 204
Stacked chart component
Stacked chart component test.
2024-10-01 14:13:39 - 2024-10-02 14:13:39
nj26uv_temperature_elementaire
nj26uv_taux_humidite_elementaire
Gauge component
Gauge component test.
2024-10-01 14:30:23
17