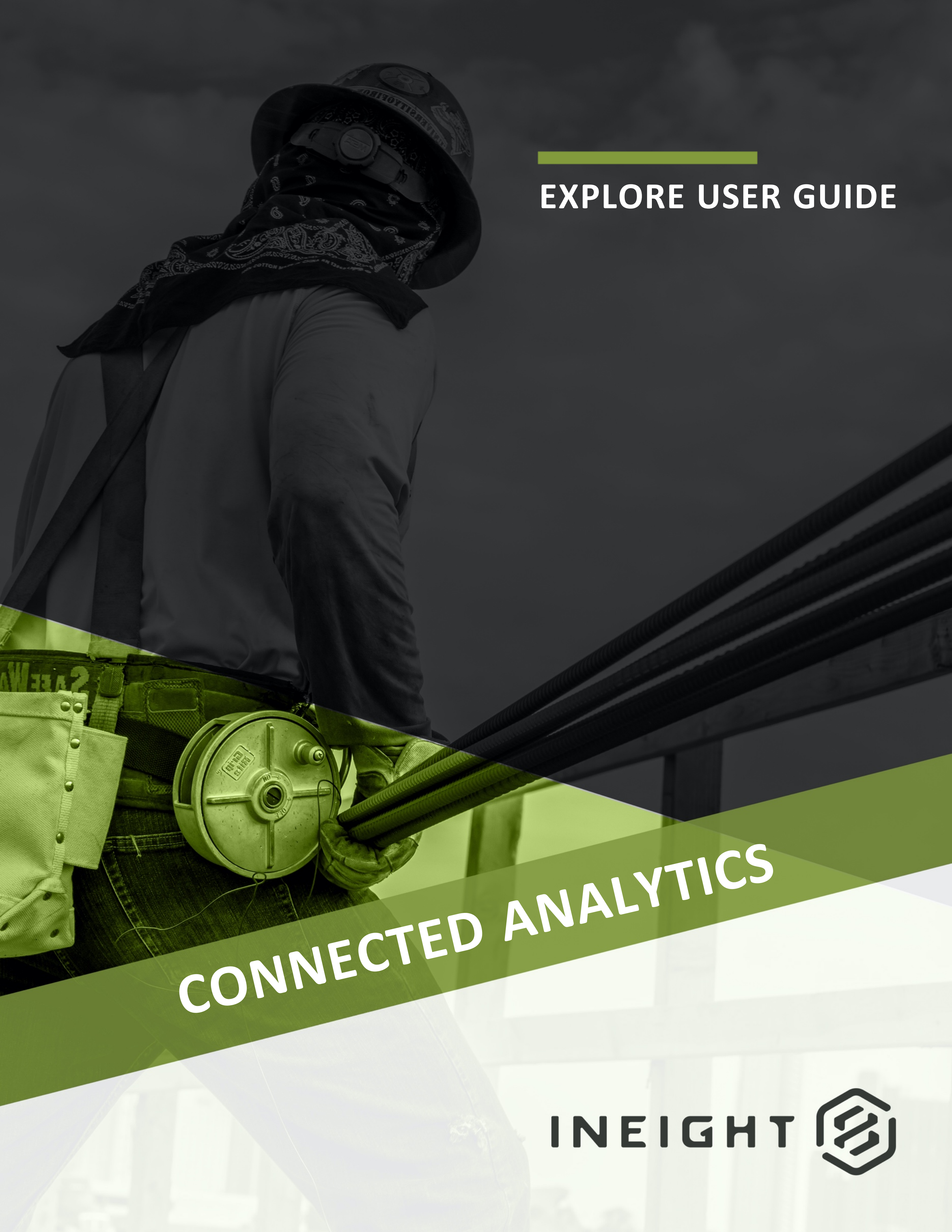

EXPLORE USER GUIDE

CONNECTED ANALYTICS

INEIGHT

Release 24.7
Last Updated: 07 August 2024

CONTENTS

STEP-BY-STEP PROCEDURES

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NAVIGATION AND STANDARD DASHBOARDS

1.1 STANDARD DASHBOARDS

InEight Explore is available to all users in an organization that have been assigned the applicable role or permissions and is a separate application from those used in any given project level. You do not have to be signed in to a project to access Explore. The information provided is not in real time for any given project.

There are multiple out-of-the-box dashboards available in Explore, with each having its own refresh schedule as determined with the product groups:

- Advanced Work Package
- Change issue
- Control audit
- Connected analytics
- Contract
- Control
- Core project
- Design deliverable tracker
- Design project delivery
- Estimate
- Manhour curves
- Material tracking
- Model tracked issue
- Operations
- Package milestone
- Portfolio
- Project controls
- Project performance
- Schedule
- Work planning

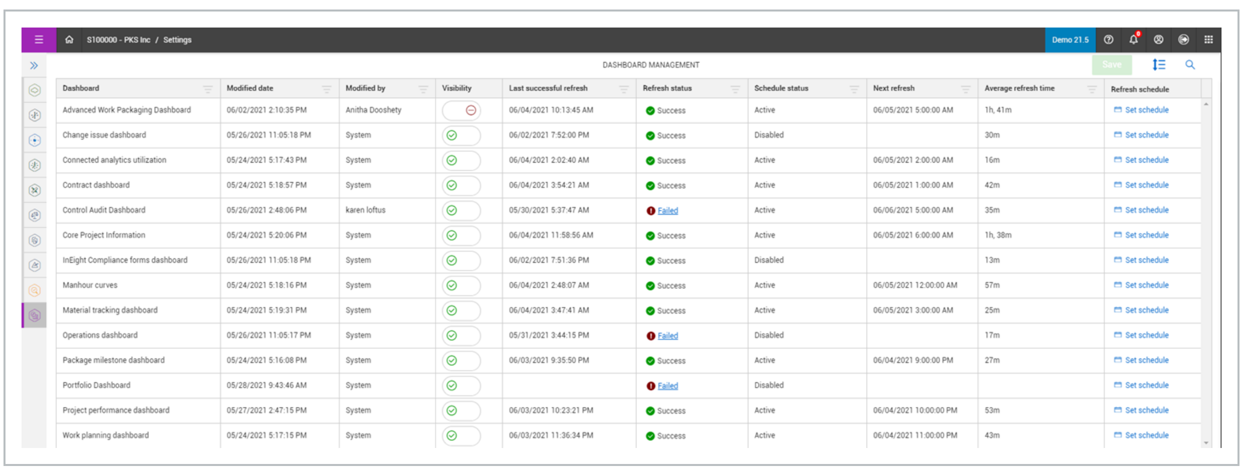
NOTE Explore is accessible from the Main menu on the top navigation bar for any project. You do not have to be assigned to a particular project to access or use the Explore dashboards.

1.1.1 Dashboard Management

This Explore settings page lets administrators hide dashboards at the organization level, control the dashboard refresh schedule, and initiate a dashboard refresh on demand. You must have the role of Organization Admin (or above) and the required permissions to view and access the Dashboard Management page.

1.1 Step by Step 1 — Dashboard Management

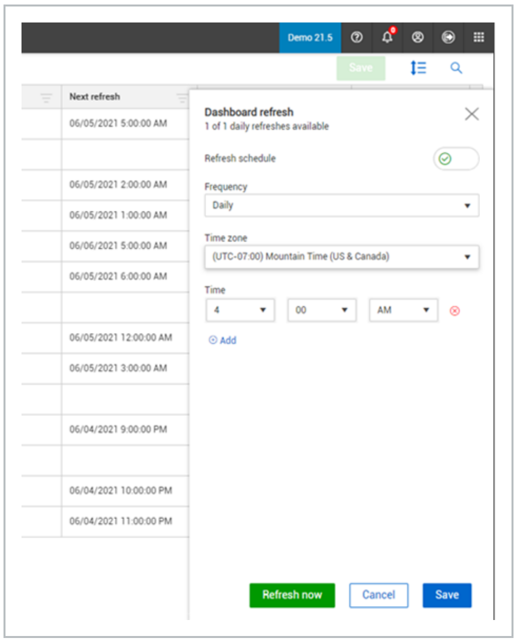
1. To manage dashboards, click the **Main menu** icon (☰), and then select an organization.
2. Under Organization Settings, go to > Settings > Explore > **Dashboard Management**.



The page shows a list of the organization dashboards where you can:

- Set whether the dashboard is shown or hidden
- See the dashboard refresh status. If the status is Failed, click the link to view the error message
- See the average refresh time to help when adjusting schedules and to avoid having multiple dashboards refresh at the same time.

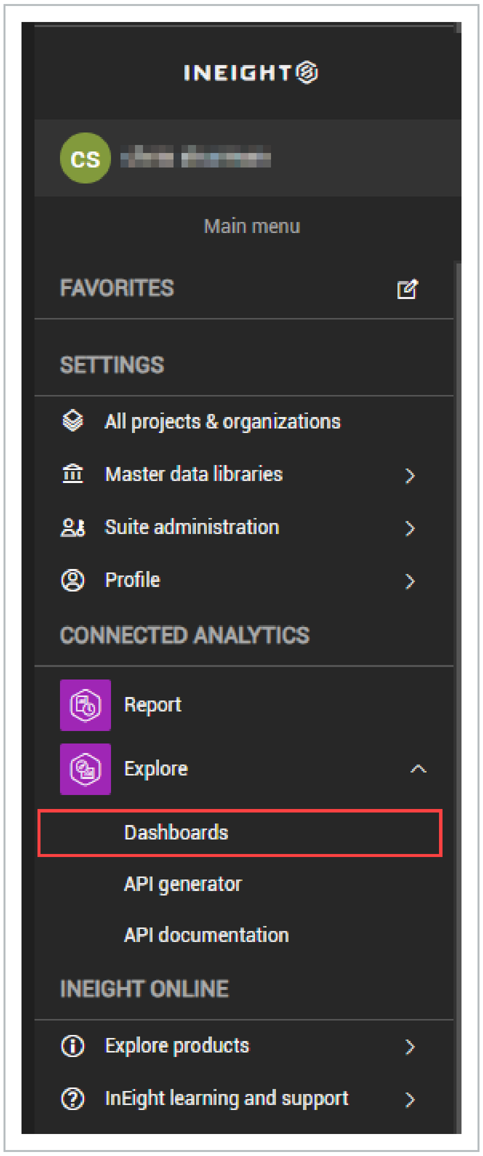
3. To define the refresh schedule, click **Set schedule**. The Dashboard refresh slide-out panel opens. At the top it shows the number of times per day that the dashboard can be refreshed.



4. Set the Refresh schedule toggle to view and make changes to the settings.
   - You can click **Refresh now** to manually refresh the selected dashboard. A manual refresh does not count towards the available number of daily scheduled refreshes.
5. Click **Save** to set the refresh schedule.

1.1 Step by Step 2 — Navigate to Explore

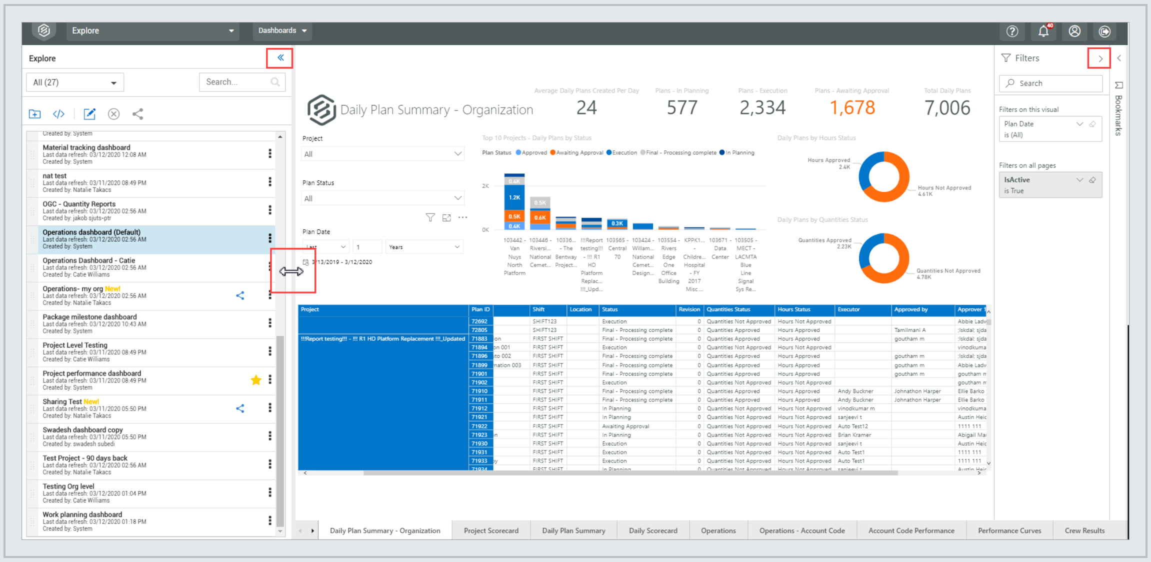
1. From the home landing page, click the **Main menu** icon ( ).
2. Click **Explore**, and then select **Dashboards**.



1.1.2 Operations Dashboard

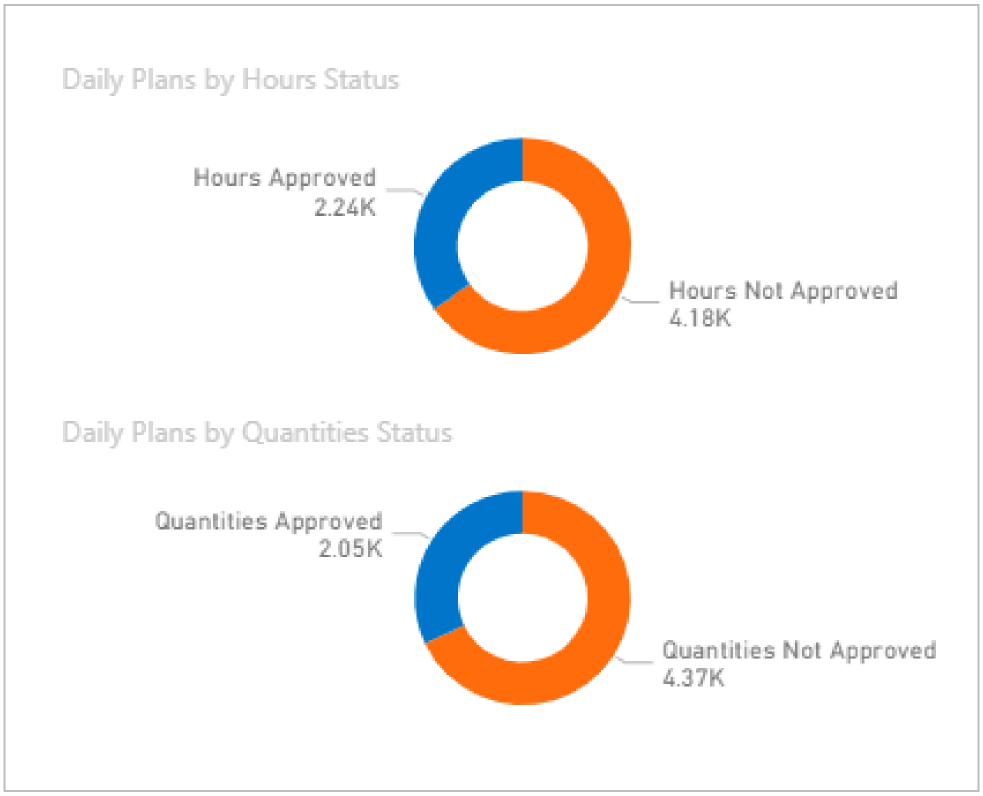
The Operations dashboard is a system-created standard dashboard available to all users and focuses on the “front office” statistics. This dashboard is permanently listed as an available dashboard; it cannot be deleted. In a later lesson, you will learn how to create a dashboard specific for your needs.

NOTE To make a dashboard your default, or primary, dashboard, click the **ellipses** of the dashboard you want, and then select **Set as Default**.



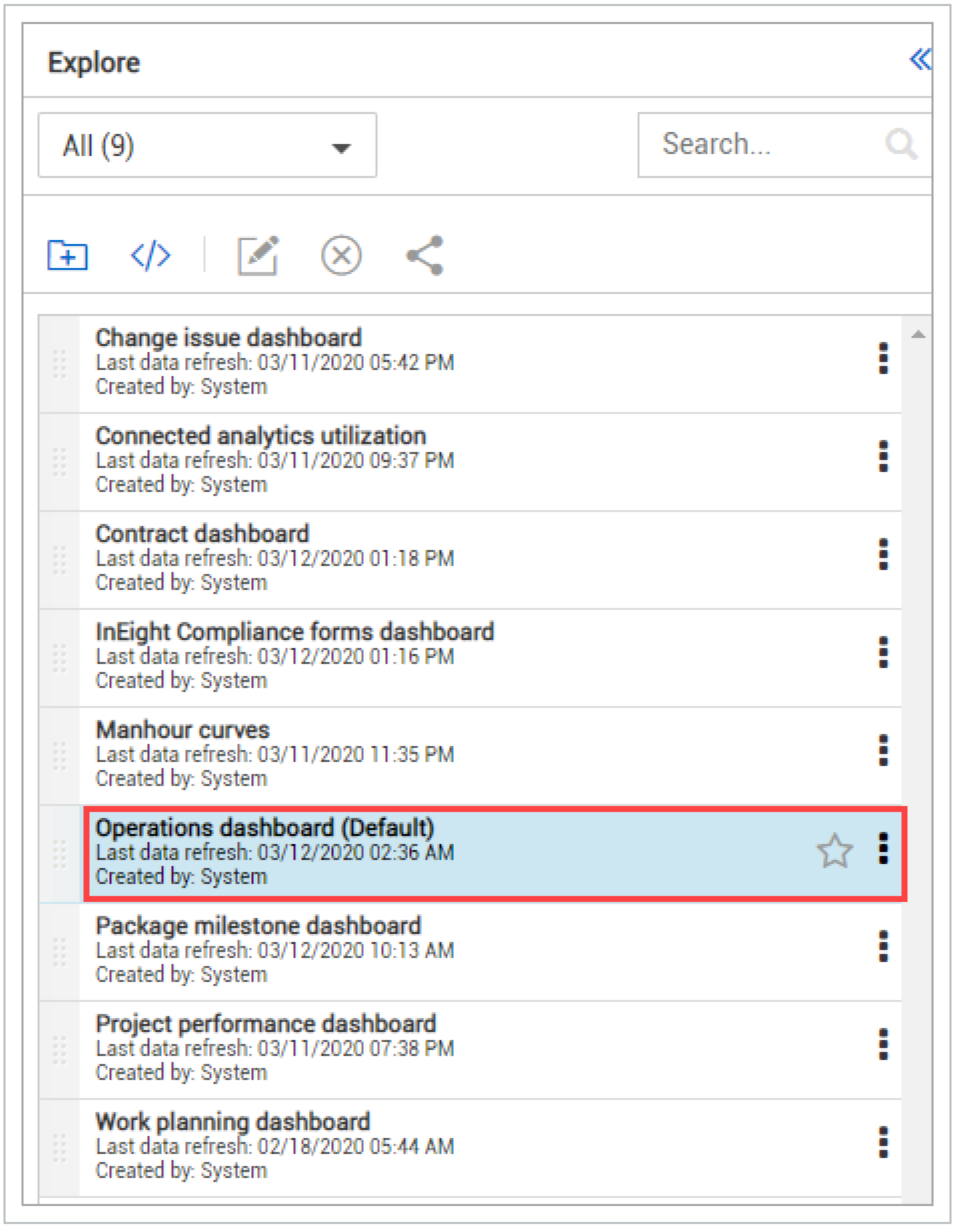
All available projects under your organization can be viewed in the Operations dashboard. Users can only see projects they have access to, as is the case for all of Explore.

The Explore color scheme for charts uses a blue tone to represent positive or well-favored data. Orange color is used to represent negative or ill-favored data, typically indicating it is something that someone needs to act upon.


Daily Plans by Hours Status
Hours Approved
2.24K
Hours Not Approved
4.18K
Daily Plans by Quantities Status
Quantities Approved
2.05K
Quantities Not Approved
4.37K

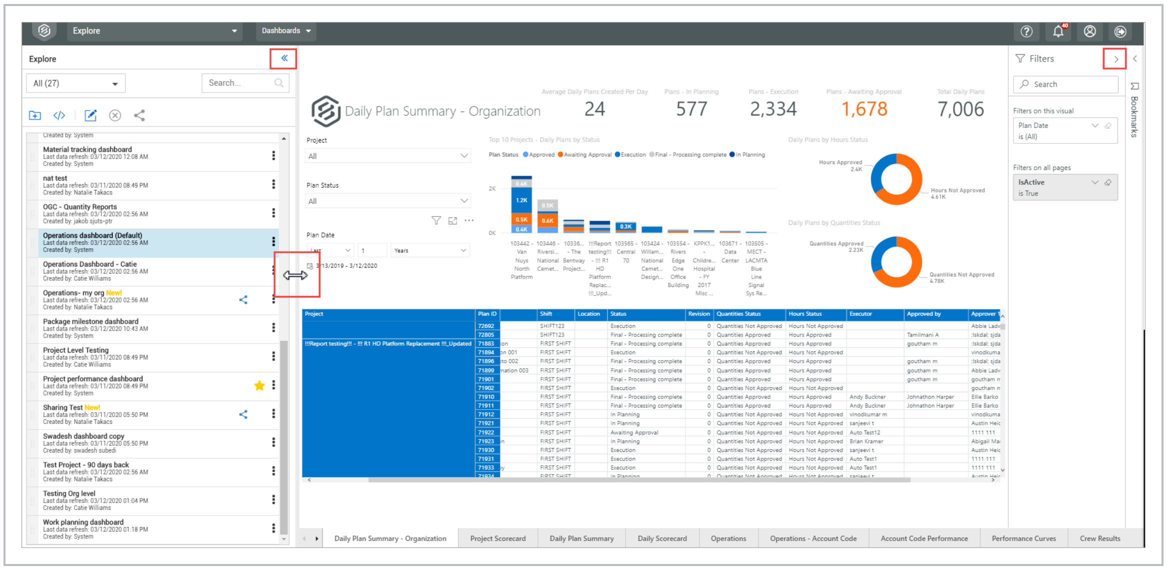
1.1 Step by Step 3 — Operations Dashboard

1. From the Dashboards page, select the **Operations** dashboard.



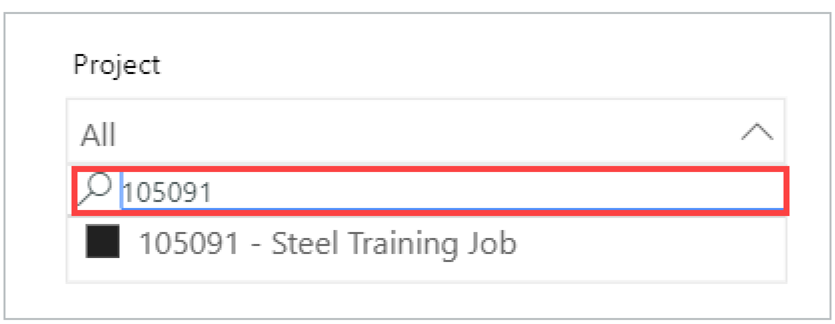
2. Expand or contract the size of the windows by moving the **handles** shown to the left or right.

- Select the **blue arrows** to collapse the side panel

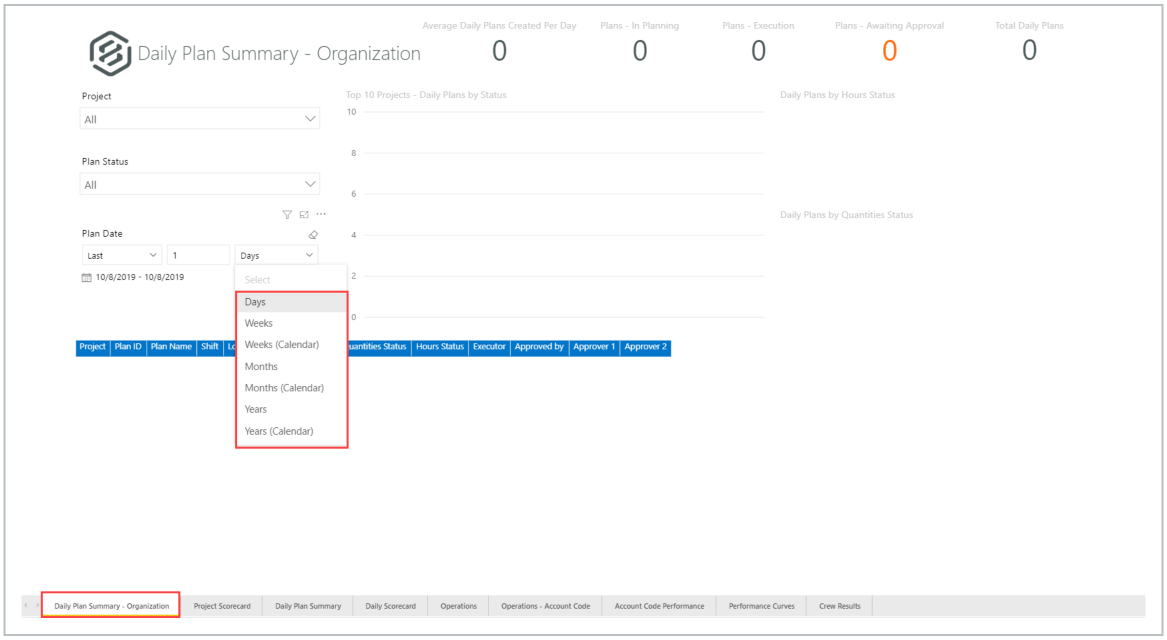


- You can also click the **blue arrows** again to expand it

3. Under the Project drop-down title, click the **(Select a Project)** drop-down.
   - You can also scroll to search for a project or type in a project name in the search bar to select a project
4. In the search bar, type [**your project name**].
5. Ensure the box in front of your project name turns from an outline to completely filled in to select it.



- The summaries, graphs, and data presented here are specific to this project and the data is considered live
- You should see the project Daily Plan Summary - Organization dashboard shown below
- If the report is blank, it may be that the time period shown is too restrictive



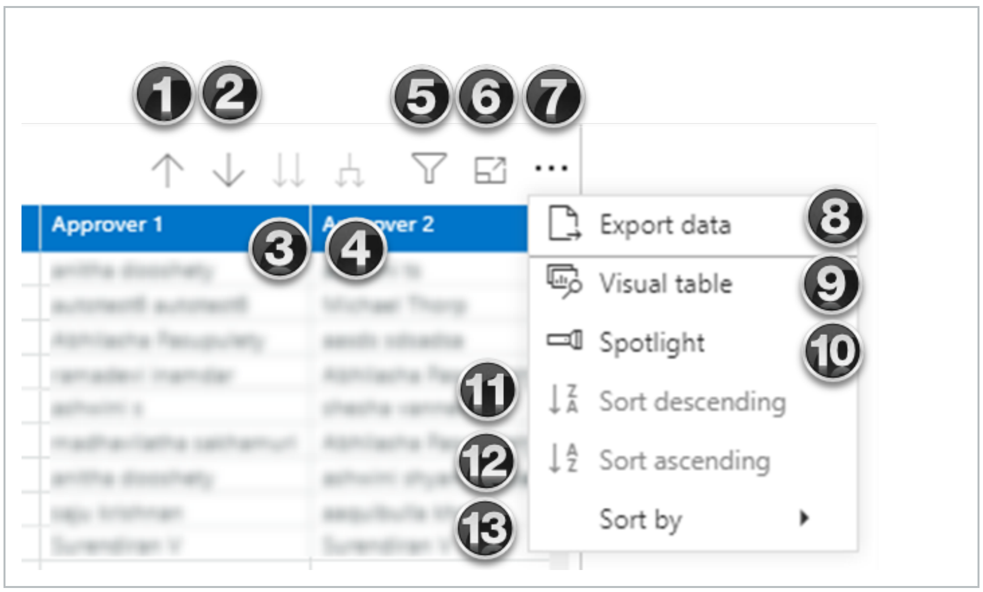
All dashboards contain options for the graphs, charts and tables displayed. Individual charts will use some combination of these functions:

Overview - Operations Dashboard Graph, Chart & Table Options

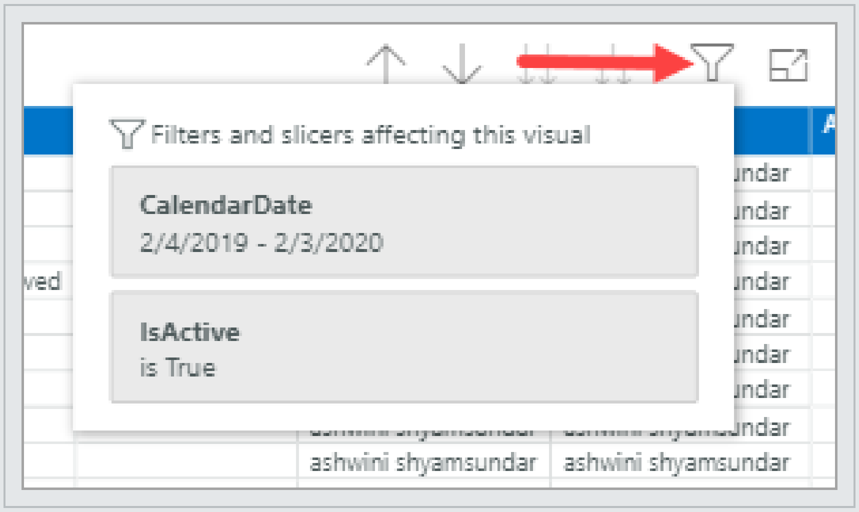
	Term	Definition
1	Drill Up	Drill up to next account code in hierarchy.
2	Drill Down	Drill down to next account code in hierarchy.
3	Go to Next Level	Go to the next level in the account code hierarchy.
4	Expand Level	Expand all down one level in the account code hierarchy.
5	Filter	Pares back data that affects the visual.
6	Focus Mode	Expand one visual in the dashboard.

Overview - Operations Dashboard Graph, Chart & Table Options (continued)

	Term	Definition
7	More Options	Opens options 8-13.
8	Export Data	Export data only to Excel (not visuals).
9	Show Data	Shows data/chart in a larger view.
10	Spotlight	Focuses dashboard on one specific visual.
11	Sort Descending	Sort data in descending order.
12	Sort Ascending	Sort data in ascending order.
13	Sort By	Allows you to sort by column.



NOTE The Filter option identifies the specific filters in use for the chart. In this case, CalendarDate and IsActive is True.

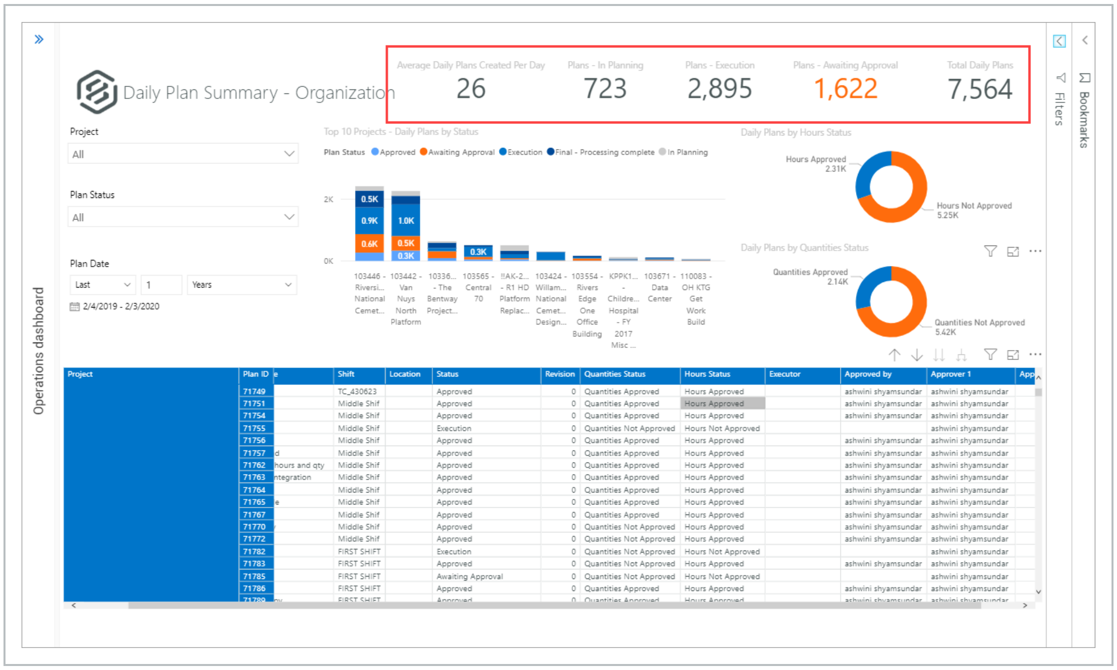


1.1.2.1 Operations Dashboard Current Visuals

The default view in this dashboard is the Daily Plan Summary – Organization. On this tab, preset headers are as follows:

- Average Daily Plans Created Per Day
- Plans - In Planning
- Plans - Execution
- Plans - Awaiting Approval

- Total Daily Plans



Daily Plan Summary – Organization Selection Options

The following table provides an explanation of each of the values in the Daily Plan Summary - Organization.

Overview – Daily Plan Summary Dashboard Graph, Chart and Table Options

	Term	Definition
1	Project	The specific projects being used for the analysis.
2	Plan Status	Defined at the organizational level, such as Approved, Awaiting Approval, Execution, Final - Processing Complete and In Planning.
3	Plan Date	The window of time designated for the graphs.

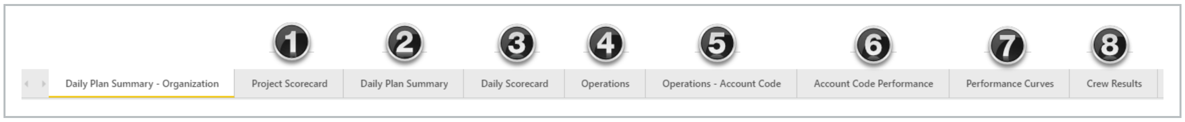
In addition to the default Daily Plan Summary – Organization tab, eight additional report/chart options are available to view and/or personalize.

Overview – Other Operations dashboard Reports/Charts

	Term	Included Graphs
1	Project Scorecard (G/L or PF)	• Top 10 Executors by Approved • Top 10 Projects by Approved • Approved Hours & Approved by Project • Bottom 10 Executors by Approved • Bottom 10 Projects by Approved
2	Daily Plan Summary	• Daily Plans by Status • Top 10 Daily Plans by Location • Daily Plans by Executor & Status • Daily Plans by Hours Status • Daily Plans by Quantities Status
3	Daily Scorecard	• Approved G/L by Executor • Top 5 Executors by Approved G/L • Approved Hours & PF by Executor and Approver • Bottom 5 Executors by Approved G/L
4	Operations (G/L or PF)	• Planned, Approved, Earned MHrs by Location • Top 5 Cost Items by Approved • Planned, Approved, Earned MHrs by Executor • Planned, Approved, Earned MHrs by Approver • Bottom 5 Cost Items by Approved
5	Operations - Account Code (G/L or PF)	• Planned, Approved, Earned MHrs by Account Code • Top 5 Account Codes by Approved • Planned, Approved, Earned MHrs by Executor • Approved Hours & Approved by Account Code • Bottom 5 Account Codes by Approved
6	Account Code Performance	• Approved G/L by Daily Plan ID • Approved Hours and PF by Daily Plan ID • Planned, Approved, Earned MHrs, Approved and Planned G/L by Plan Date
7	Performance Curves (G/L or PF)	• Cumulative Approved
8	Crew Results	• Approved G/L • Top 5 Cost Items by Approved G/L

Overview – Other Operations dashboard Reports/Charts (continued)

	Term	Included Graphs
		• PF • Bottom 5 Cost Items by Approved G/L



On pertinent Dashboard reports, changing between Production Factor (PF) or Gain/Loss (G/L) reports is as simple as changing the dashboard toggle button. To use this function, click and drag the **toggle** button.

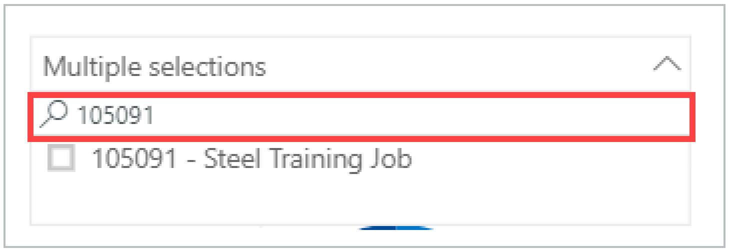
1.1.3 Project Performance Dashboard

The Project Performance dashboard is a system-created standard dashboard available to all users and focuses on the field relevant performance statistics. This dashboard is always listed as an available dashboard; it cannot be deleted. In a later lesson, you will learn how to create a dashboard specific to your needs.

All available projects under your organization can be viewed in this Project performance dashboard.

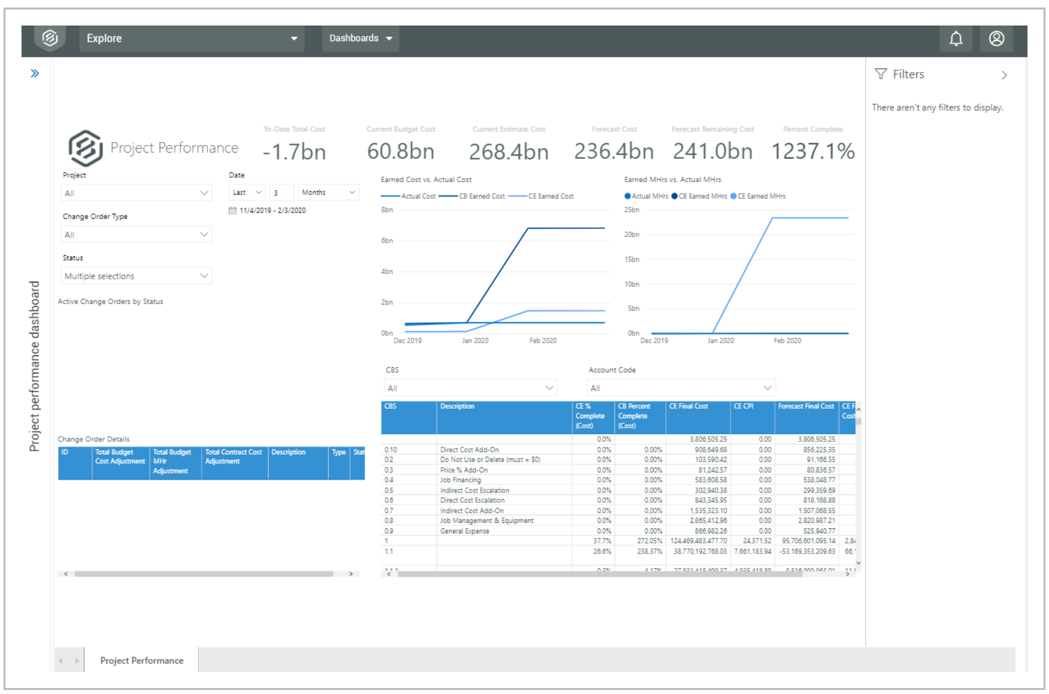
1.1 Step by Step 4 — Project Performance Dashboard

1. From the Dashboards page, click the **Project performance dashboard**.
2. Under the Project Drop-down title, click the **(Select a project)** drop-down.
   - Note you may also scroll to search for a project or type in a project name in the Project search bar to select a project
3. In the search bar, type [**project name**].

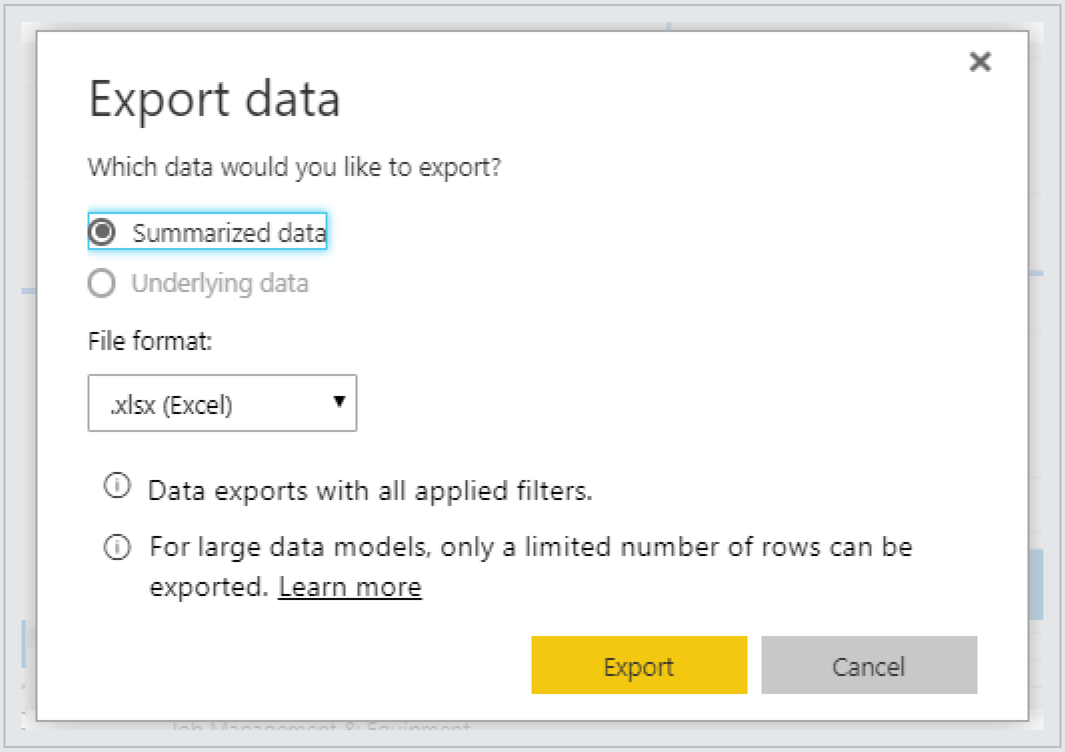


4. Click [**project name**] to select it.

- The summaries, graphs and data presented here are specific to this project and the data is considered live
- You should see the Project Performance dashboard shown below



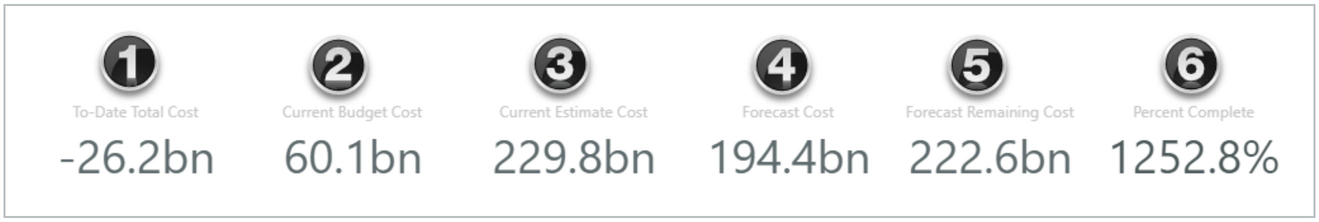
TIP The **Export data to Excel** function only exports the data (not the graph or chart).



Performance Header Values

The following table provides an explanation of each of the header values at the top of the Project Performance dashboard.

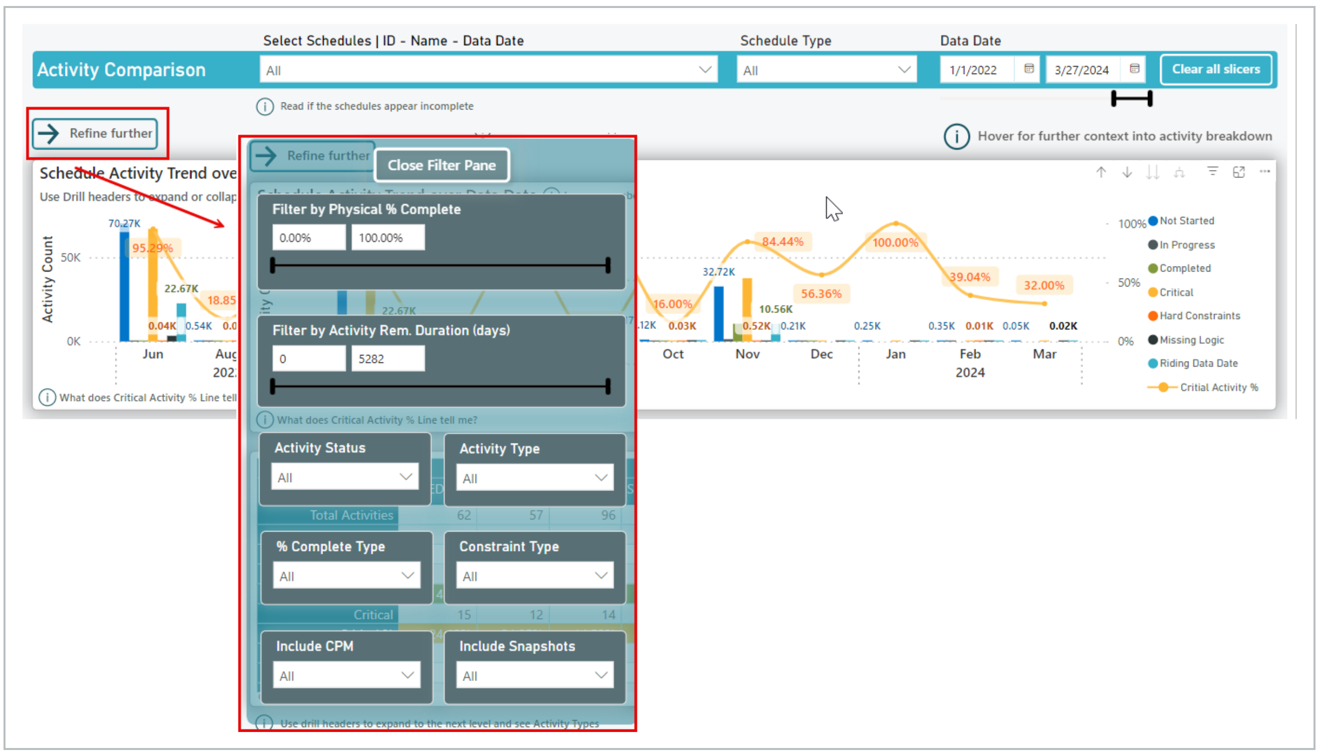
	Term	Definition
1	To-Date Total Cost	$ spent to date
2	Current Budget Cost	Current Budget total $
3	Current Estimate Cost	Current Estimate total $
4	Forecast Cost	Total cost (to date) + Forecast remaining cost
5	Forecast Remaining Cost	Forecasted remaining $
6	Percent Complete	Quantity complete to date/Forecast T/O quantity



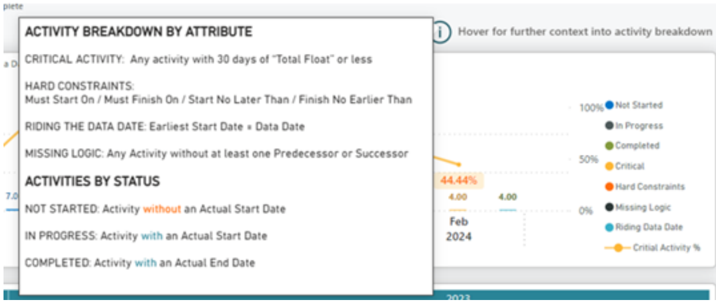
1.1.4 Schedule Dashboard

The Schedule dashboard lets you compare schedule and activity comparisons, perform float analysis, view resources, risk information and metric quality assessments.

To access, click on the schedule dashboard from the dashboard list. The **Refine further** icon opens a collapsible filtering pane with additional filtering criteria. To apply filters and close the side out, click the **Close Filter Pane.**



Click any of the Information icons placed throughout the tabs of the dashboard to provide you with additional context to the data that is being shown.



Preset tabs are as follows:

- Activity Comparison
- Schedule Comparison
- Float Analysis
- Resource Overview
- Risk Overview
- Risk Analysis
- Opportunity Analysis
- Event Register
- Mitigation Details
- Schedule Quality

1.2 EXPLORE PERMISSIONS

To access dashboards and APIs, you must be assigned a role with applicable permissions, which are defined by a system administrator. Permissions are pre-assigned to roles that are based on functional areas, such as project management, construction management, field office, operations, finance, compliance, and administration that let you run reports tagged with the same permission assigned to one of the roles. For more details, refer to Roles and Permissions in InEight Platform. Permissions are configured in Suite Administration > Roles and permissions > Permissions > **Explore**.

Permission Name	Description	Level
View dashboards and embedded content	Allows you to view standard dashboards (data level permissions are allowed to the projects you are assigned to in Platform), custom dashboards that have been shared with you, add and edit external content, and view external content that has been shared	Base user

Permission Name	Description	Level
	with you. This permission also gives you access to create, edit, and delete your own folders (these folders are only available at the individual user level). This permission is the parent of all other permissions in Dashboards.	
View estimate dashboard	Allows you to view the InEight Estimate dashboard and any other custom derivatives of this dashboard that have been shared with you.	Base user
Edit and delete custom dashboards	Allows you to edit and save custom versions of the standard dashboards, this permission does not give sharing access. This permission is necessary for you to be added as a collaborator on a dashboard that is shared.	Base user
User level sharing	Allows you to share your custom dashboards and embedded content with other individual users.	Base user
Project level sharing	Allows you to share your custom dashboards and embedded content with all the users on a project. You can only do this for projects that are assigned to you in Platform.	Project Admin
Organization level sharing	Allows you to share your custom dashboards and embedded content with all the users in an organization. You can only do this for organizations that you are assigned to in Platform.	Org Admin
Reporting APIs	Allows you to access to all the data in the reporting APIs for the selected products.	Base user
View shared dashboards and embedded content only	Allows you to hide all standard dashboards and limits the list of dashboards and embedded content a user can see to only those that have been shared with them individually. The permission limits dashboards and embedded content shared with a user assigned to the project or organization level.	Org Admin

1.3 DASHBOARD FOLDERS

In Explore, you can create folders to organize the various types of dashboards you create. This can help to easily identify dashboards you may refer to on a weekly basis versus monthly basis or dashboards you create for an executive level versus a field operations level. In a later lesson, you will learn how to modify and create these additional dashboards.

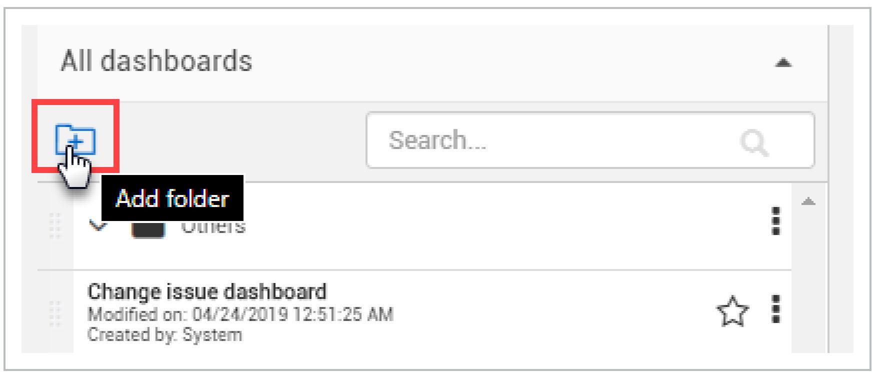
1.3.1 Folder Creation

The following Step by Step walks through the two ways you can create a dashboard folder.

1.3 Step by Step 1 — Create Dashboard Folders

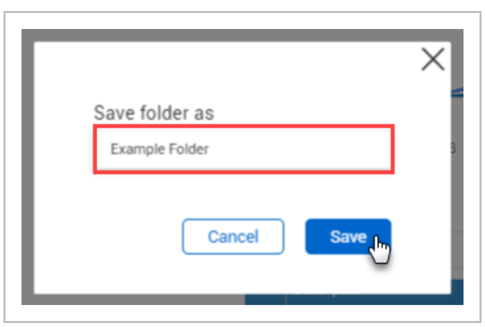
Option 1:

1. From the Dashboards page, click the **Add Folder**  icon to add a folder.

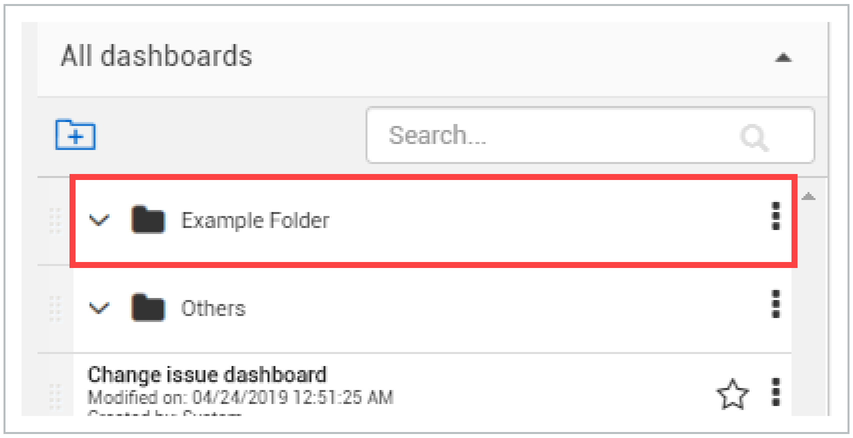


   - A dialog box opens and prompts you to name the folder

2. In the Save Folder As field, type **Example Folder**, and then click **Save**.

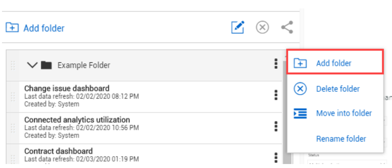


- The new folder will now show on the left panel as shown below.

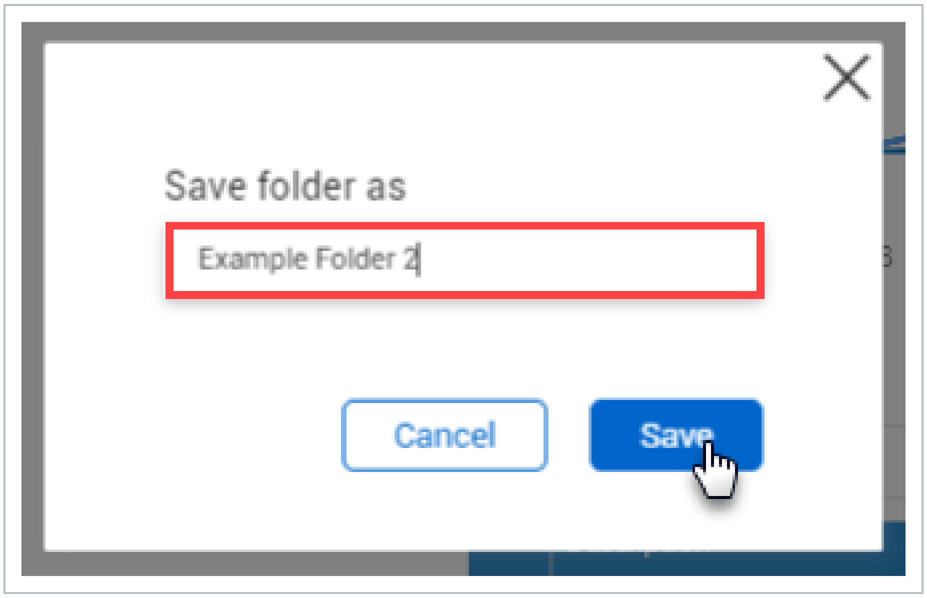


Option 2:

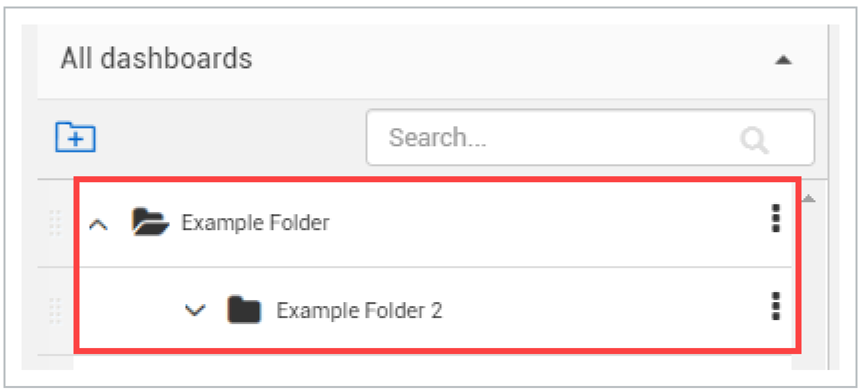
1. Click the **three Ellipses Context menu** icon to the right of the new Example Folder.
   - A slide-out panel opens
2. Click **Add Folder**.



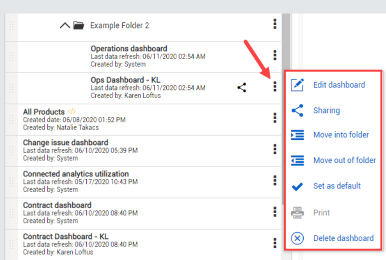
3. In the Save folder As field, type **Example Folder 2**, and then click **Save**.



- A sub-folder has been created



TIP Besides adding folders, you can edit, share, move, set as the default dashboard or delete the dashboard via this same Context menu icon.

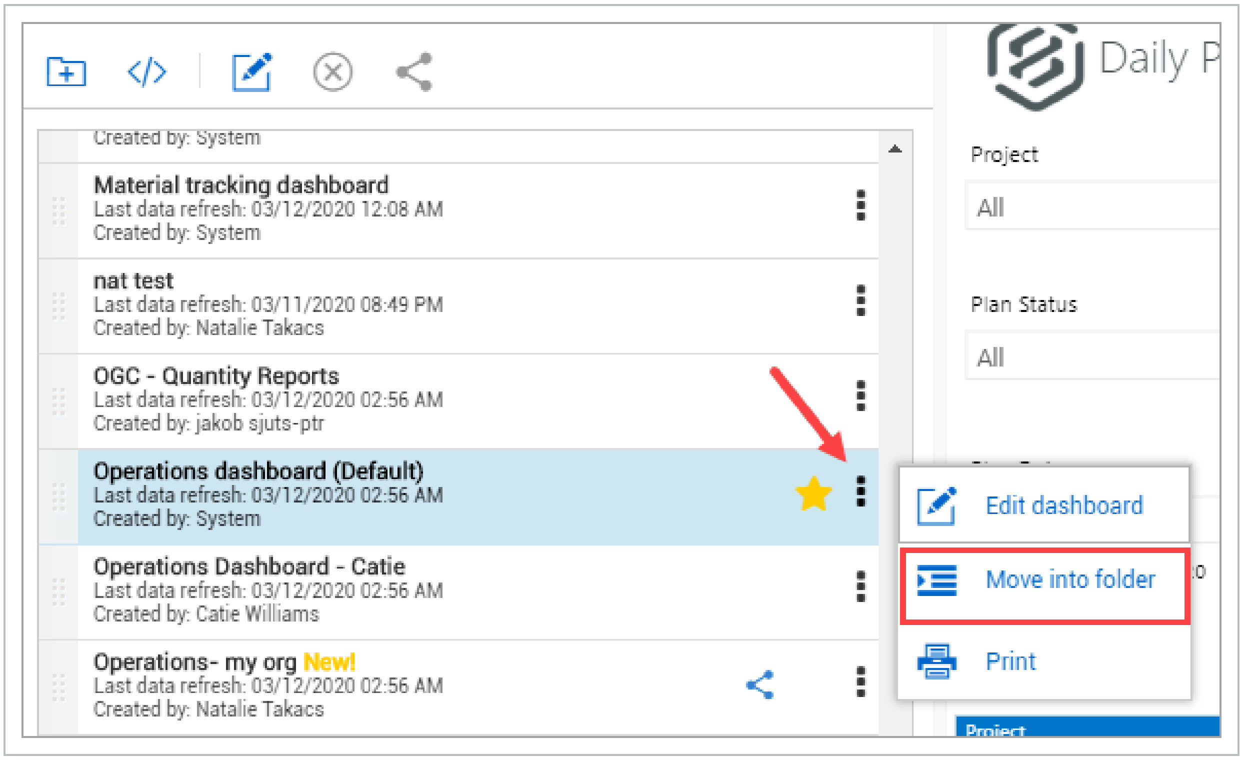


1.3.2 Move Dashboards to a Folder

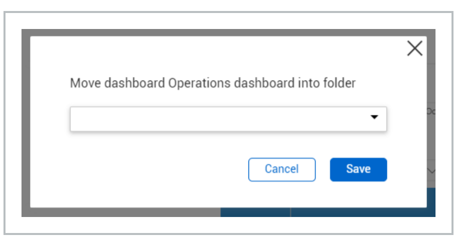
The following steps walk you through how to move a dashboard into a folder.

1.3 Step by Step 2 — Move a Dashboard into a Folder

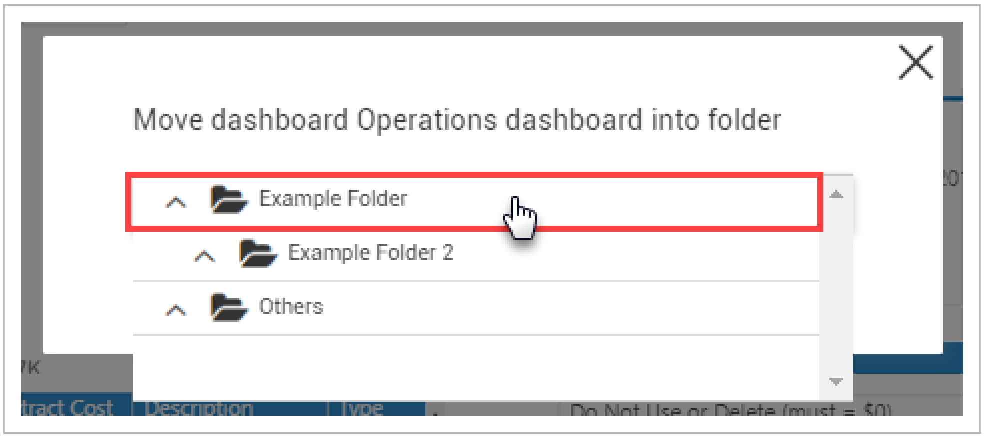
1. From the Dashboards page, click the **three-ellipses Context menu** icon of the Operations dashboard.
2. Click **Move into Folder**.



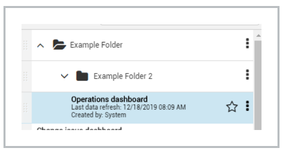
- A dialog box opens with a drop-down list to select the folder for which you want to move the dashboard into



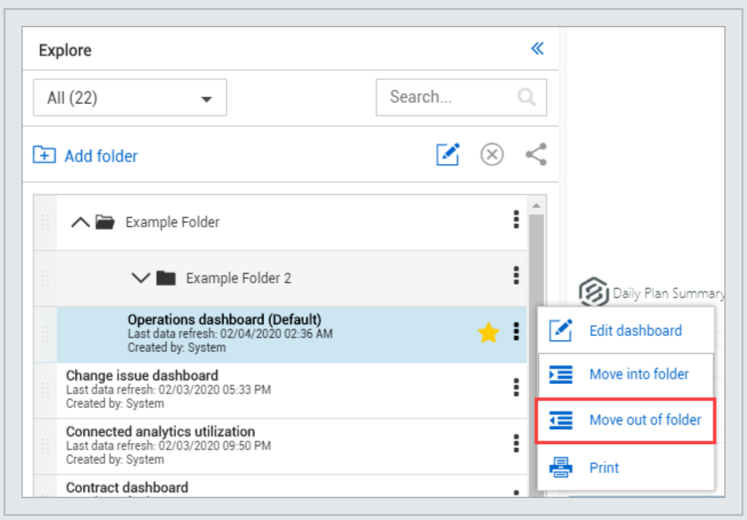
3. Click the drop-down arrow, and then select **Example Folder**.



4. Click **Save**.
   - The Operations dashboard will now be located within the Example folder



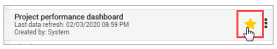
TIP You can use the same Context menu icon to remove a dashboard from a folder.



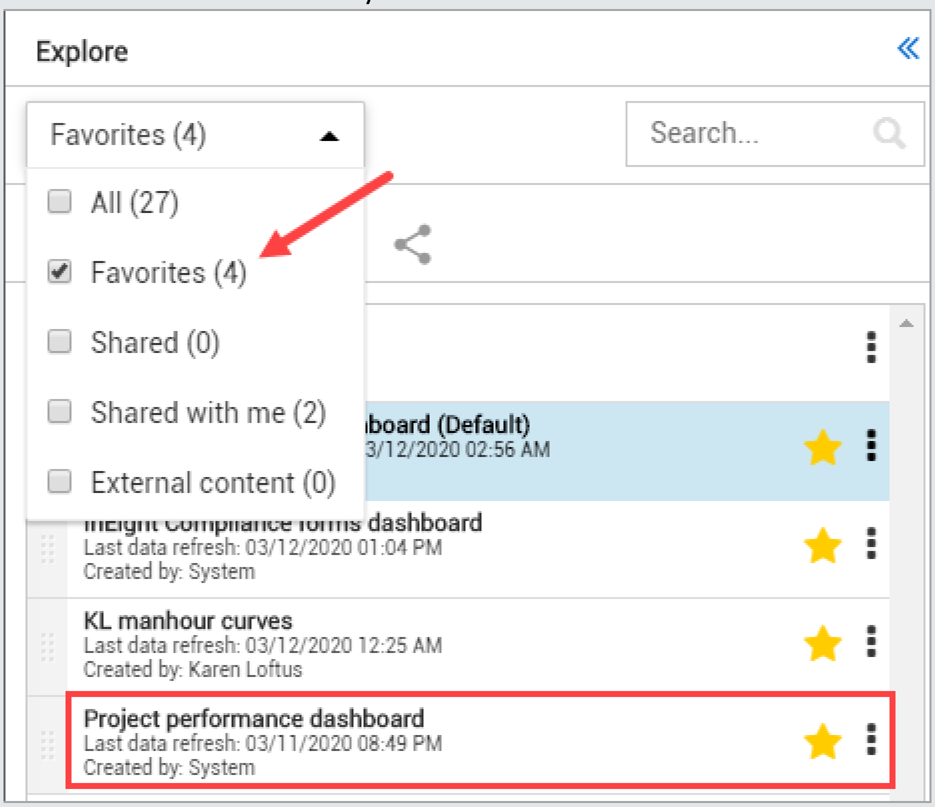
1.4 DASHBOARD FAVORITES

You can mark one or more dashboards as your favorite by clicking the **Favorites** icon on the right side of any dashboard. This can be done on the two system-created dashboards or any dashboards you create. This is a convenient way to access dashboards that you use often.

Click the **Favorites** icon next to the Project Performance dashboard.



NOTE The dashboard now shows up under the Favorites header when selected from the drop-down list. The star remains yellow.



1.5 DASHBOARD SHARING AND COLLABORATION

The concept behind sharing a dashboard evolved as a means to save time and energy for those working together who share similar data needs. Sharing a dashboard may be a perfect option when the original dashboard doesn't need to be edited by the person who is viewing the shared dashboard. Collaboration goes a step further by granting the person with whom the dashboard is shared, permission to collaborate on and edit the dashboard. Think of collaboration as a subset of sharing, meaning you cannot collaborate on a dashboard until the dashboard is able to be shared. Only system dashboards that you personally have edited and renamed can be shared.

To share a system dashboard you must first save it as your default dashboard, re-save and re-name the dashboard, and then you can share or collaborate.

The word "Default" after the dashboard name represents your default dashboard, and Sharing is grayed out and unavailable as it is a default dashboard setting.

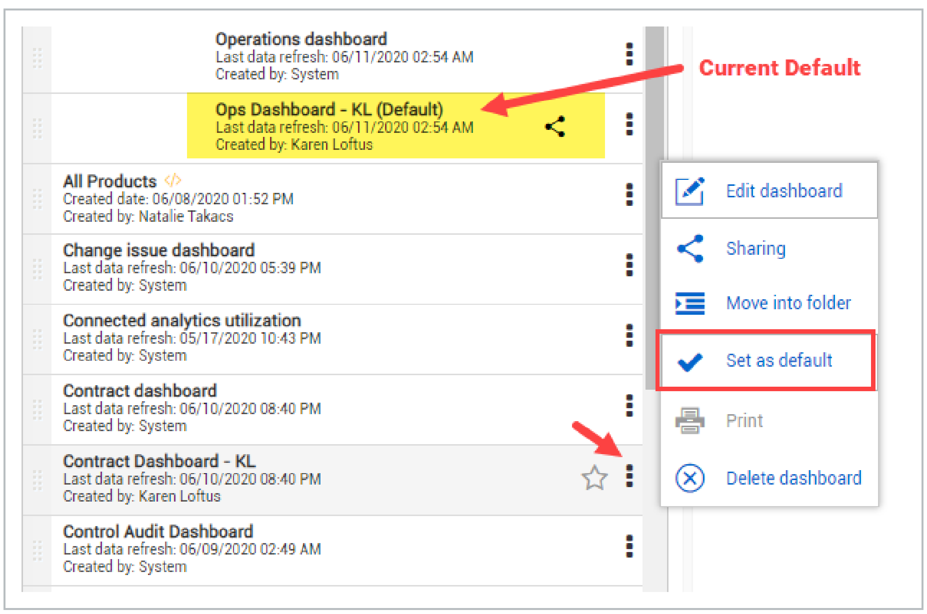
1.5.1 Set a Dashboard as Your Default

Initially, no single dashboard in InEight Explore is considered your default dashboard. Until you choose to share a dashboard, or collaborate with others, does it become an important function.

In order to share or collaborate with others on a dashboard you initiate, it must first be set as your default dashboard.

To set or change a dashboard as your default:

1. Click the **3-dot ellipses** on the right side of your desired dashboard.

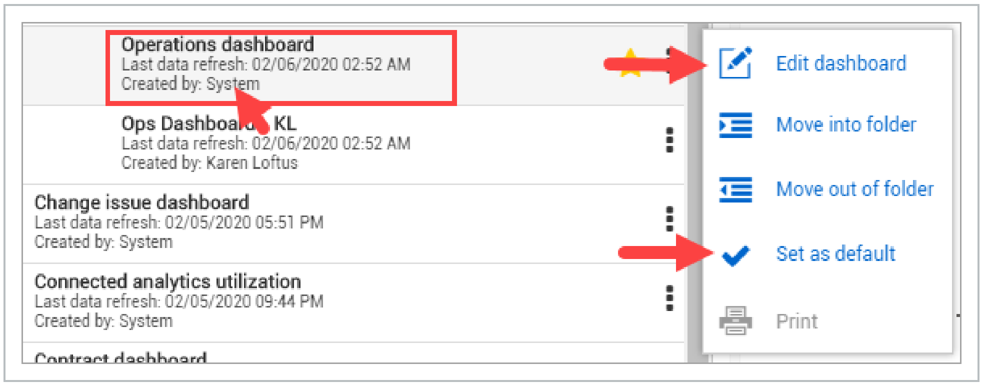


2. Select **Set as default**.
   - You have now set (or changed) your default dashboard

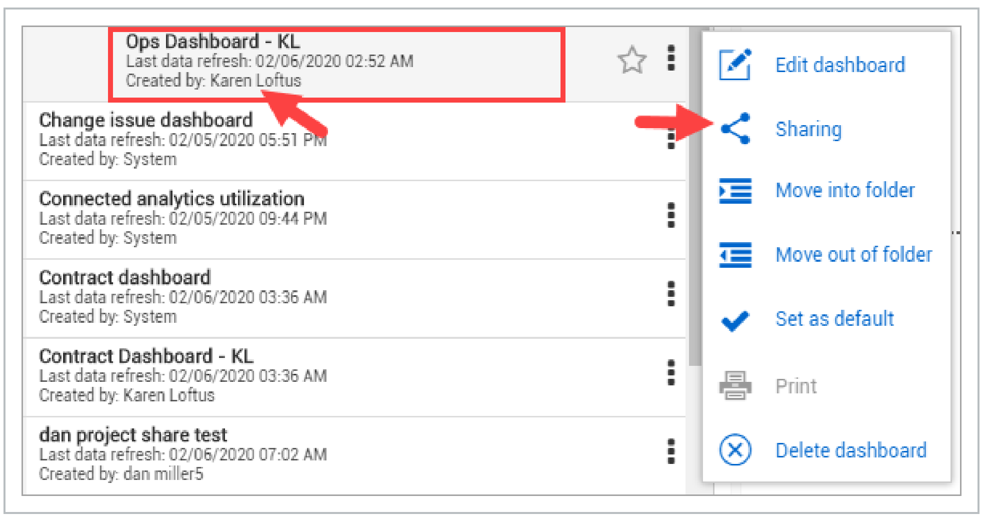
1.5.2 Share a Dashboard with Others

After a dashboard is shown as your default, the Sharing option becomes available to you.

The Operations Dashboard below does not have the Sharing option available as it is a System dashboard and it has not yet been set as the default and re-named.

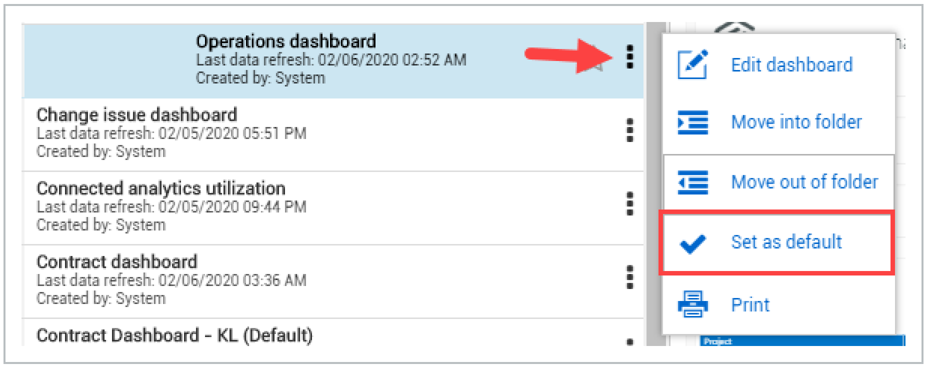


Conversely, the personalized, re-named dashboard called Ops Dashboard – KL has the Sharing option available.

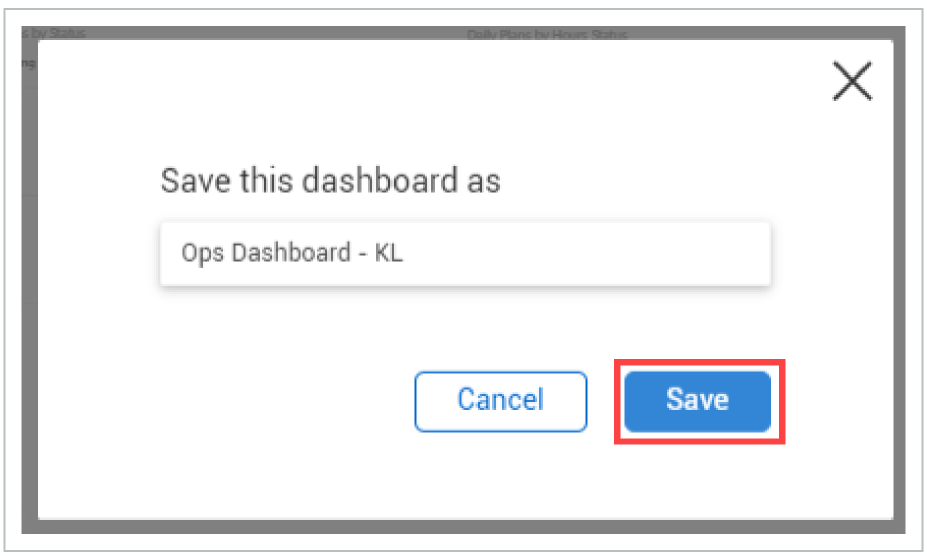


1.5 Step by Step 1 — Share a Customized System Dashboard

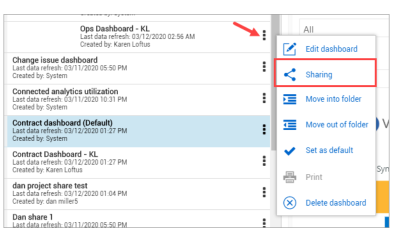
1. Select a system dashboard to share.
2. Click the **3 dot ellipses** on the right side of the system dashboard name.
3. Click **Set as Default**.



4. Click the **3 dot ellipses** again.
5. Click **Edit Dashboard**.
6. Make edits and go to **File > Save As**.
7. Re-name the dashboard.
8. Click **Save**.

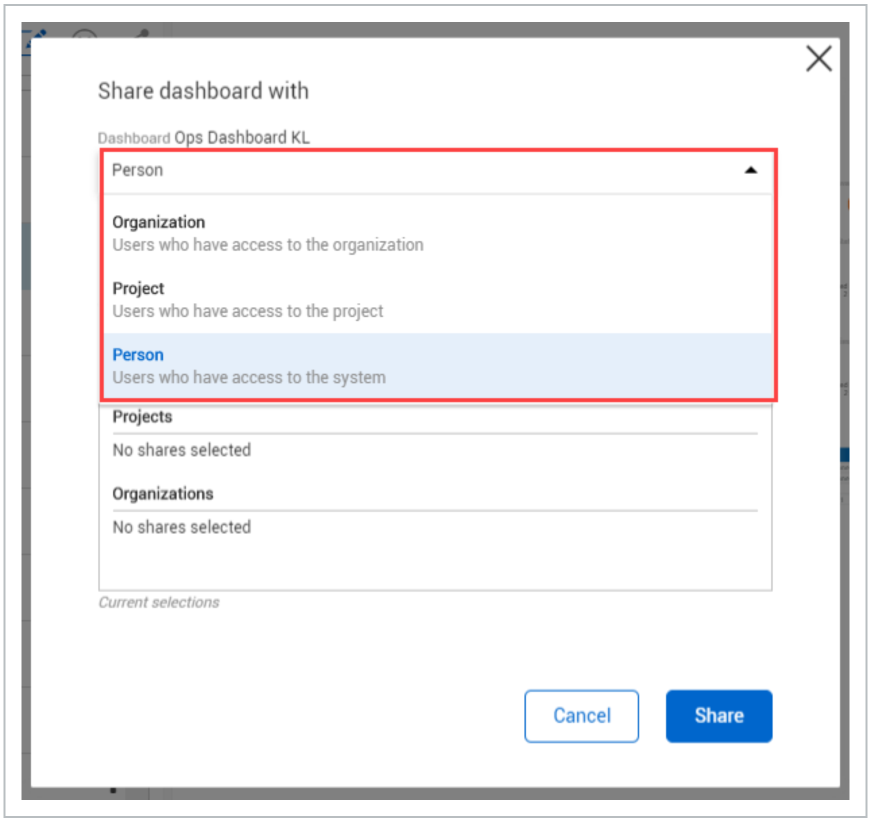


9. From the newly named dashboard, click the **Sharing** option.

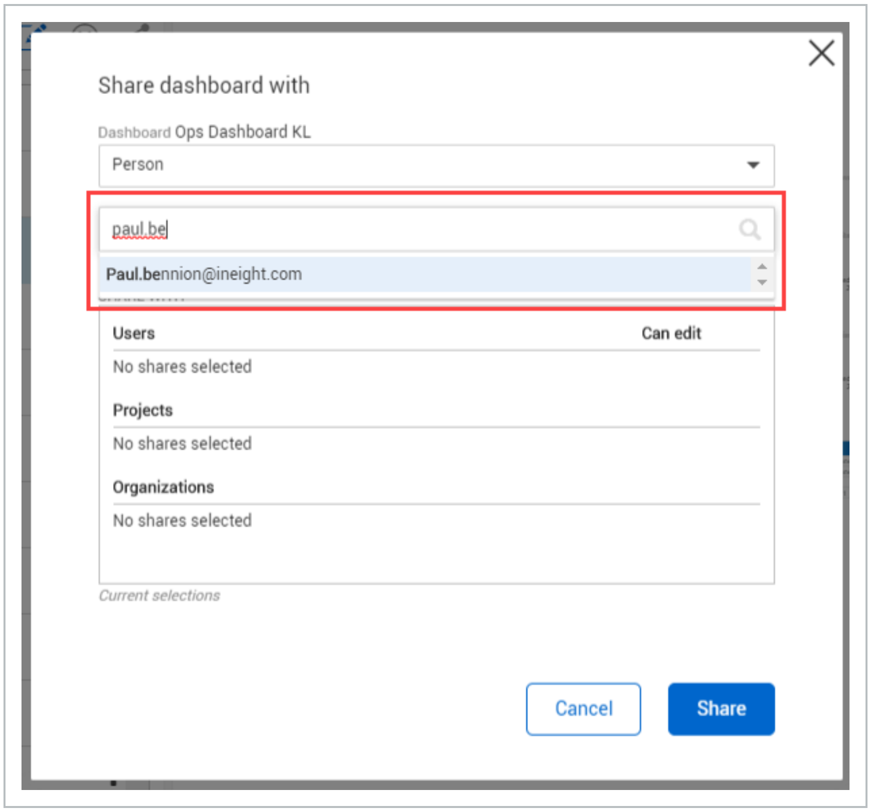


10. Select with whom you would like to share the dashboard by selecting an option from the drop-down list. Options include:

- Organization
- Project
- Person



- For example, if you choose to add a person, you can begin typing the name of a person's email address to be guided to select an individual. A similar concept is available for Project and Organization



11. Click **Share**.
    - A Dashboard Shared notification will briefly appear on the top of your screen
    - Now, the Shared icon is visible to the right of the dashboard name

12. NOTE Elevated permissions are required to share at the project and org level.

    NOTE Use caution when using the Organization option, as all individuals will see this new dashboard option upon their next sign-on to Explore.

With each new log in to Explore, newly shared dashboards will show the yellow **New!** tag next to the dashboard name. Afterward, the New indicator will not show. Hovering over the **Share** icon indicates if the dashboard is being shared with you, or if you are sharing the dashboard with others.

A black **Share** icon indicates a dashboard is shared by you.

A blue **Share** icon indicates a dashboard is shared with you.

Click the blue **Sharing** icon to view the Sharing details for that specific shared dashboard. Click **Close** to return to the dashboard.

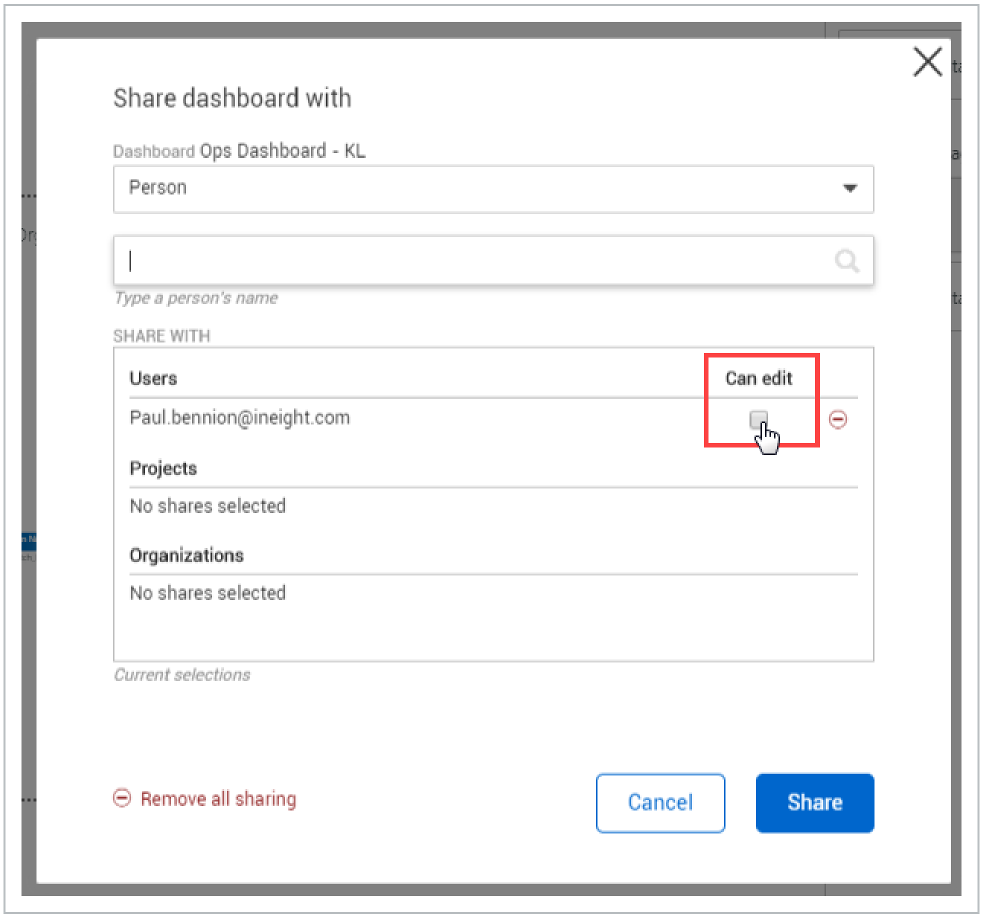
While you cannot edit others' dashboards, you can save your own copy of it and make your own modifications to it. When changes are made by you, others whom you share the dashboard with will also see your changes.

1.5.3 Collaborate on a Shared Dashboard with Others

Collaborating on a dashboard gives the person with whom the dashboard is shared not only the permission to view it, but also to edit the file. Any changes made will be visible to all parties who have access to the shared dashboard.

Using the process above, once you have gotten to the step of selecting who the dashboard will be shared with, in our example, we'll be sharing the dashboard with just one person.

Checking the **Can Edit** box and then clicking **Share** provides the person, project or organization the ability to collaborate with you on the shared dashboard.



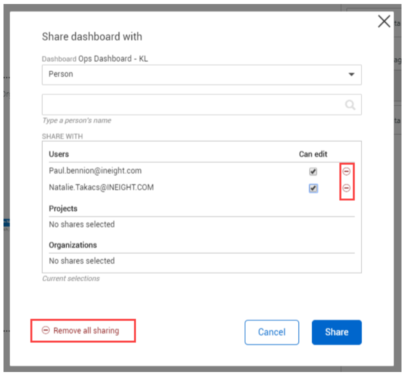
1.5.4 Remove Sharing

For any dashboard you create and share, you may also remove sharing. By hovering over the **Sharing** icon, you can identify the reports you have shared with others.

1.5 Step by Step 2 — Remove Sharing

1. Click the black **Sharing** icon.

2. Either select **Remove all sharing** to remove all people from sharing mode, or the click the **Remove Sharing** red circles next to the names of those to remove.



- This change is instantaneous
- A dialog box will briefly appear to confirm the removal has occurred

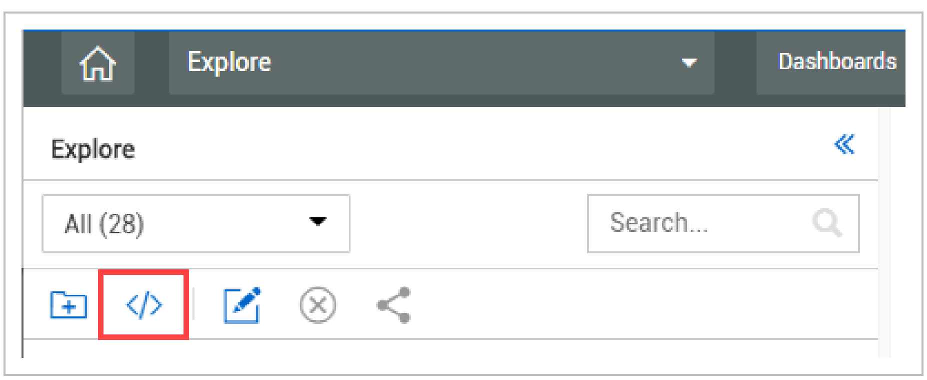
1.5.5 Embed External Content

Embedding external content in InEight Explore means you can expose dashboards you have on your Power BI service or Tableau server in the InEight Explore application.

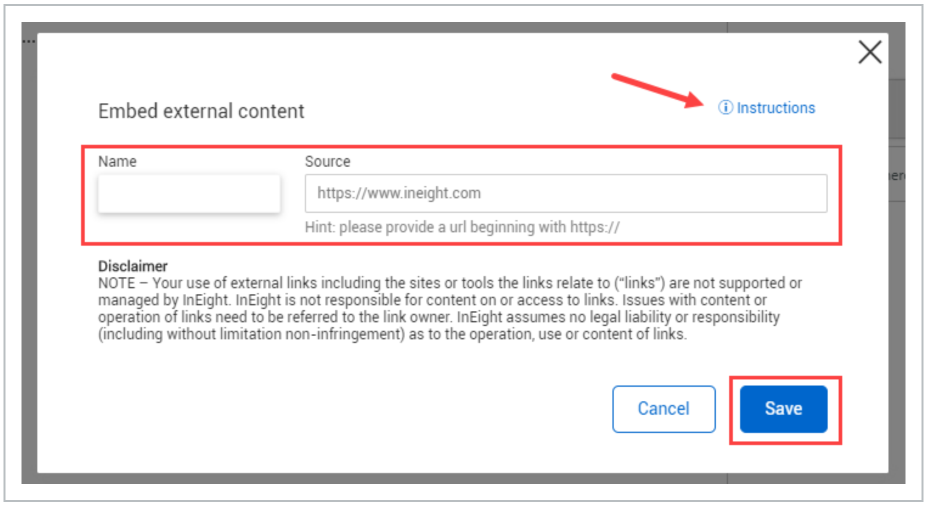
While your organization is still responsible for maintaining security and maintenance of the dashboards and data behind them, you can have all your dashboards in one place and it eliminates the need to bounce around different windows to look at dashboards that may contain more than just InEight Application data.

1.5 Step by Step 3 — Set-up Adding External Content

1. Click the **Add External Content** icon.

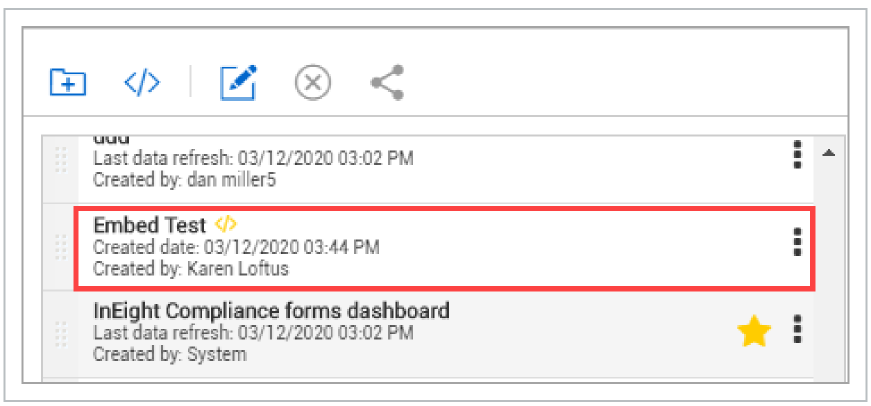


2. In the dialog box, add the **name** for the new report, in addition to the **Source** for the external content.
3. Click **Save**.



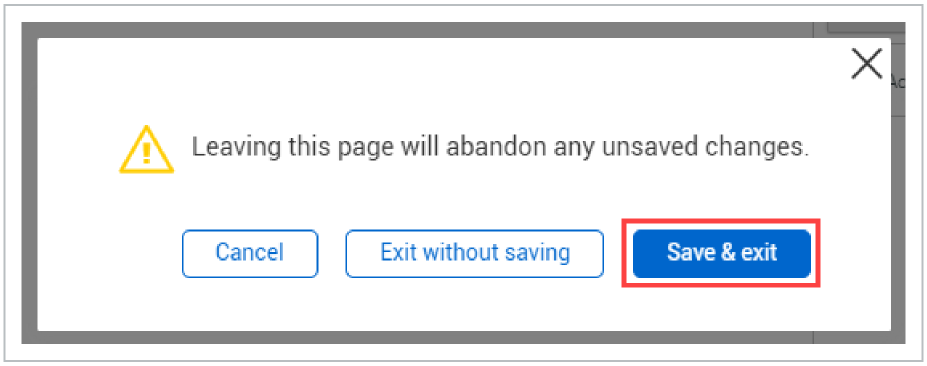
TIP	Click the **Instruction** icon to be taken to the Guide for embedding content in Explore.

- The resulting saved report appears alphabetically in your list of reports. The External Content identifier is also shown.

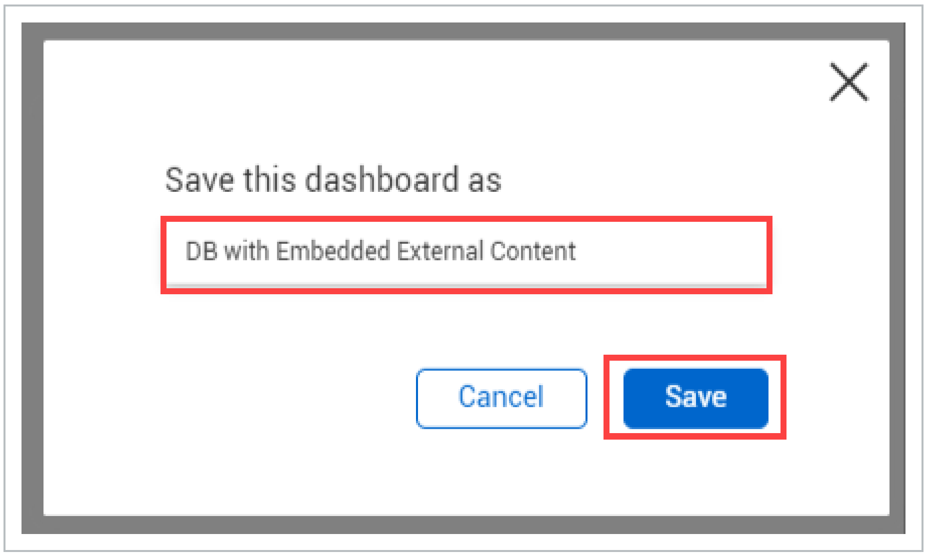


- Clicking on this dashboard takes you to the https:// Source page shown above

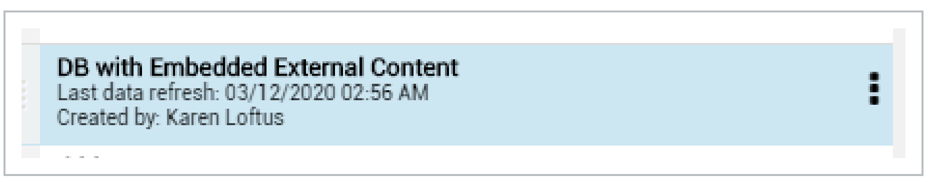
4. Before leaving the page, and in the event you need to save this new report, click the **Save & Exit** button.



5. This allows you to type in a **dashboard name**, and then click **Save**.



6. Search for the resulting dashboard, again alphabetically.

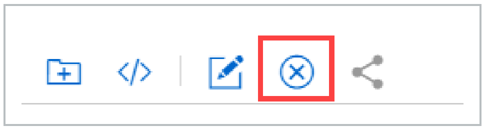


1.5.5.1 Deleting an Embedded Dashboard

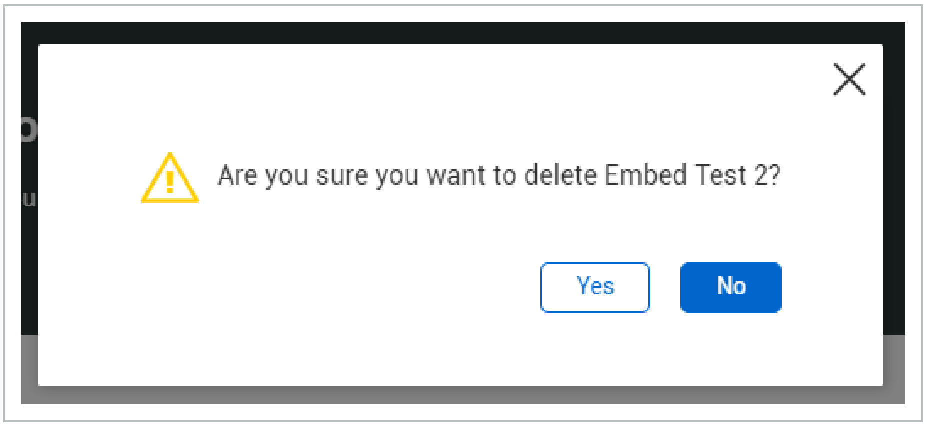
As with other dashboards, dashboards with embedded external content can be deleted.

1.5 Step by Step 4 — Delete an Embedded Dashboard

1. From the list of dashboards, click on the desired dashboard to delete.
2. Click the **Delete Dashboard** icon.



3. You will be asked to confirm the deletion. Click **Yes**.

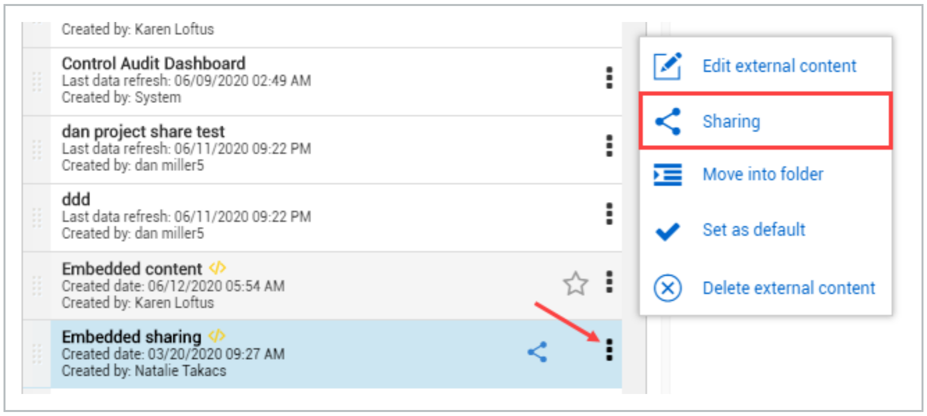


1.5.6 Share External Content

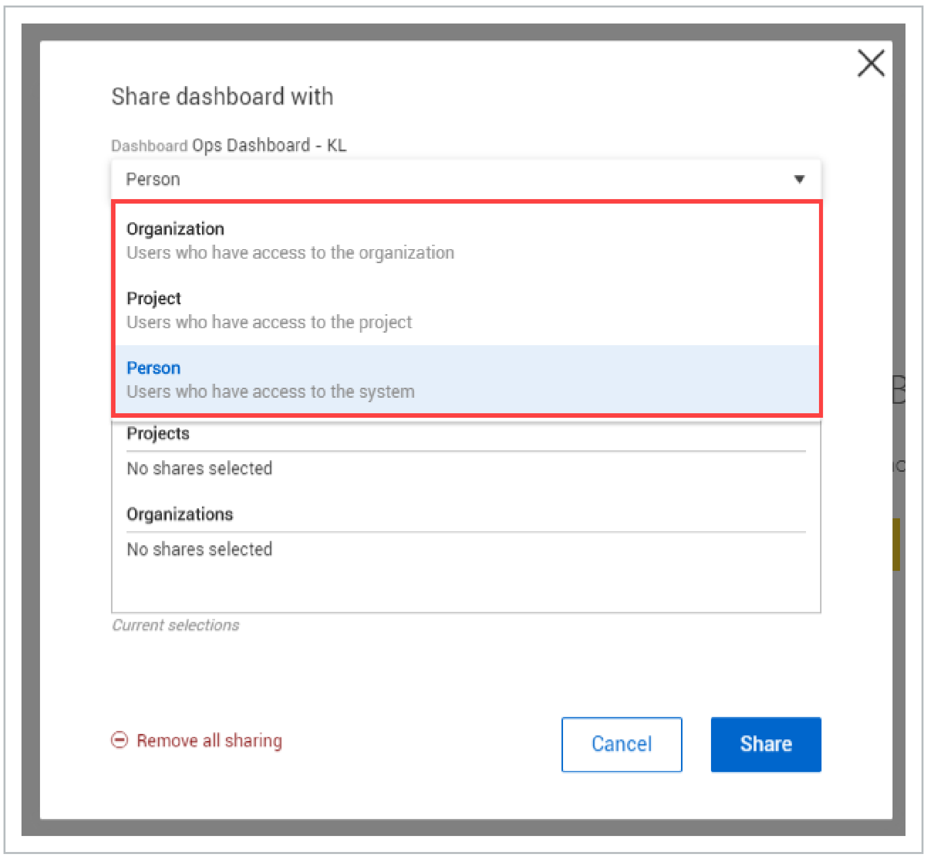
Sharing embedded content allows you to have one place to view all reporting and ensures that everyone in your organization is looking at the same reporting.

1.5 Step by Step 5 — Share External Content with Others

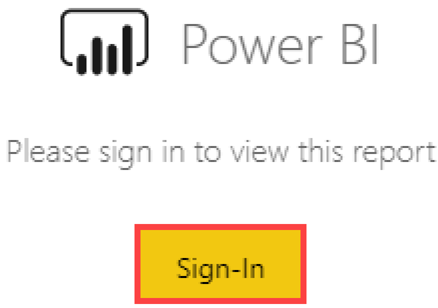
1. To share external content that you have already embedded into Explore, click the **Sharing** icon, and then the **vertical ellipses** for the external content.



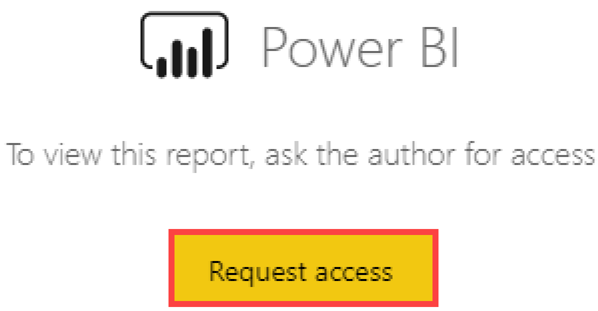
2. Then in the dialog box, select the appropriate Organization, Project or Person from the drop-down list to apply sharing.



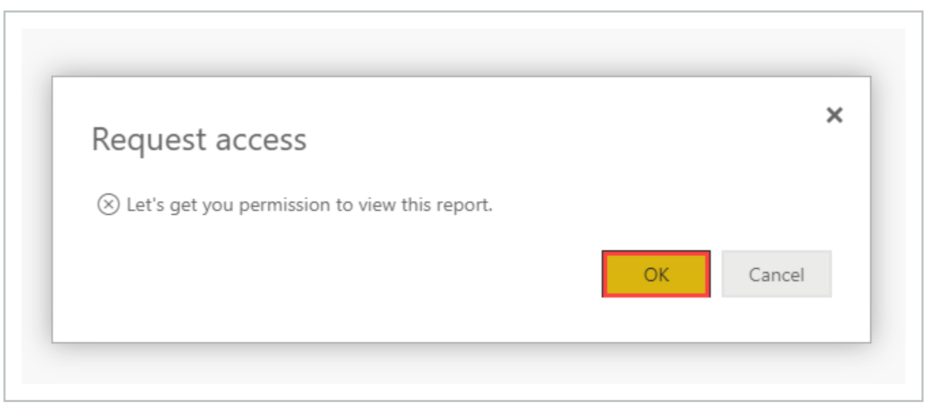
3. When a dashboard is shared with you, if you already have a Power BI login, click **Sign-In**.



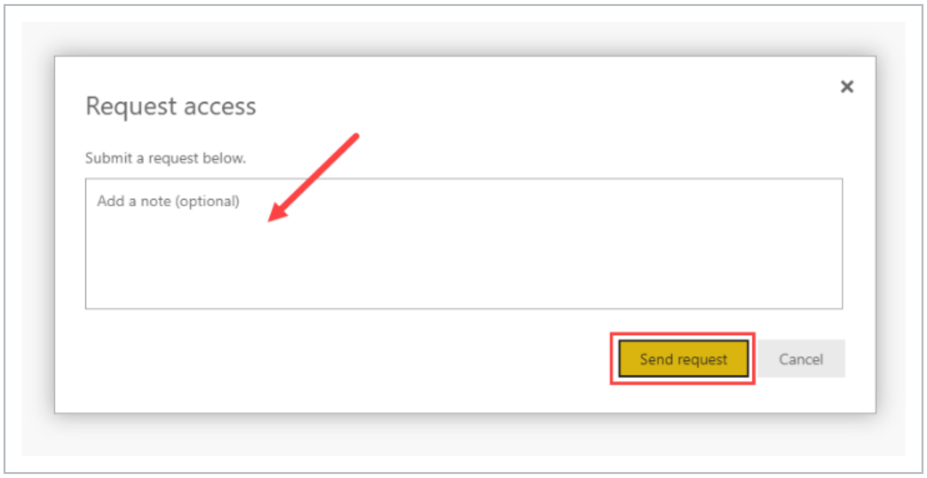
4. To request access to a shared report, click the **Request access** button.



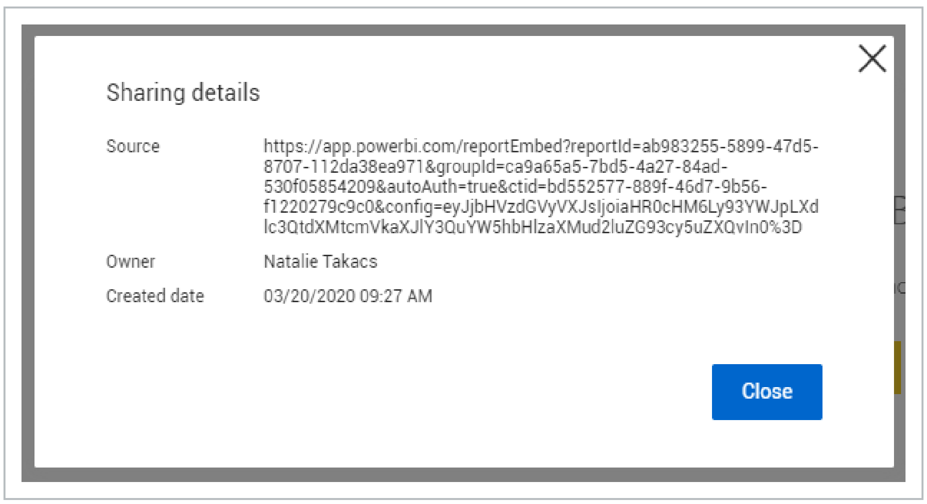
5. Depending on your authorization level, you may get another dialog box to request access. Click **OK**.



6. You can add a personal note, and then click **Send request**.



NOTE Clicking the **Sharing** icon of any dashboard that has been shared with you results in a dialog box indicating the source, owner and created date for the share.

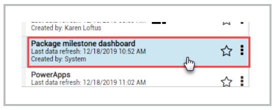


1.6 DASHBOARD EXAMPLES

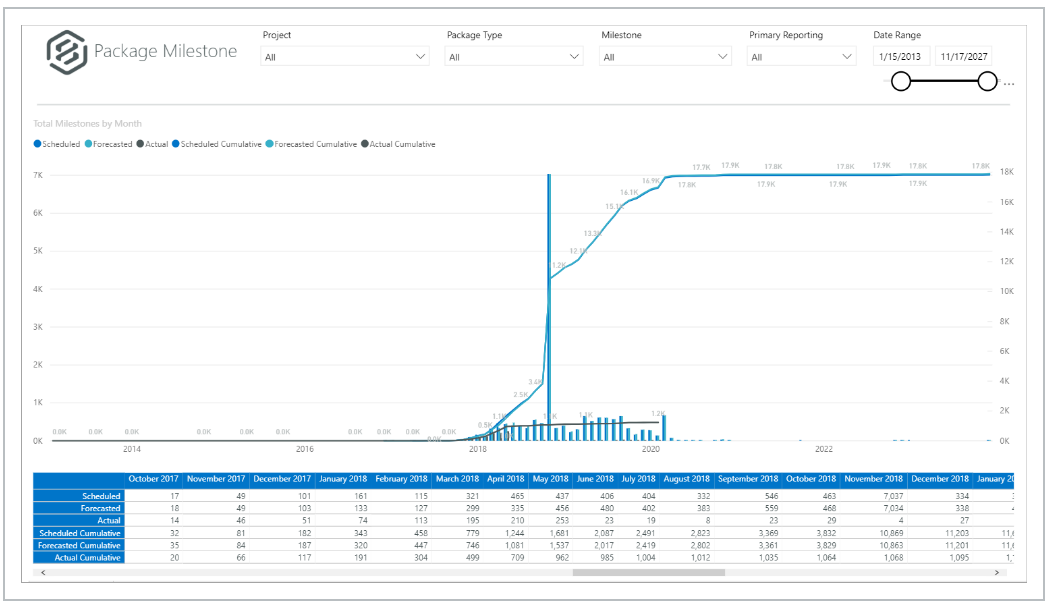
The Package Milestone dashboard lets you see information about user-defined milestones in the procurement process over time. A second tab details bid package information at the line item level with the ability to link back to InEight products.

1.6 Step by Step 1 — Package Milesetone Dashboard

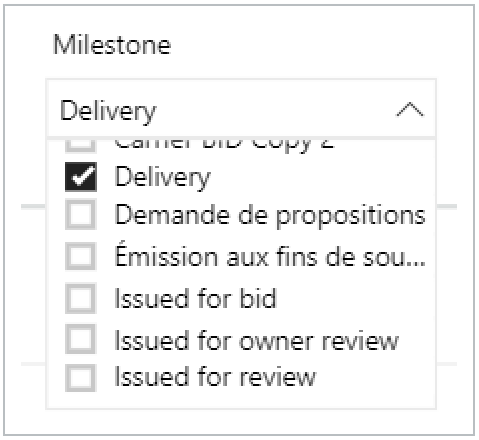
1. From the Dashboards page, click the **Package Milestone dashboard**.



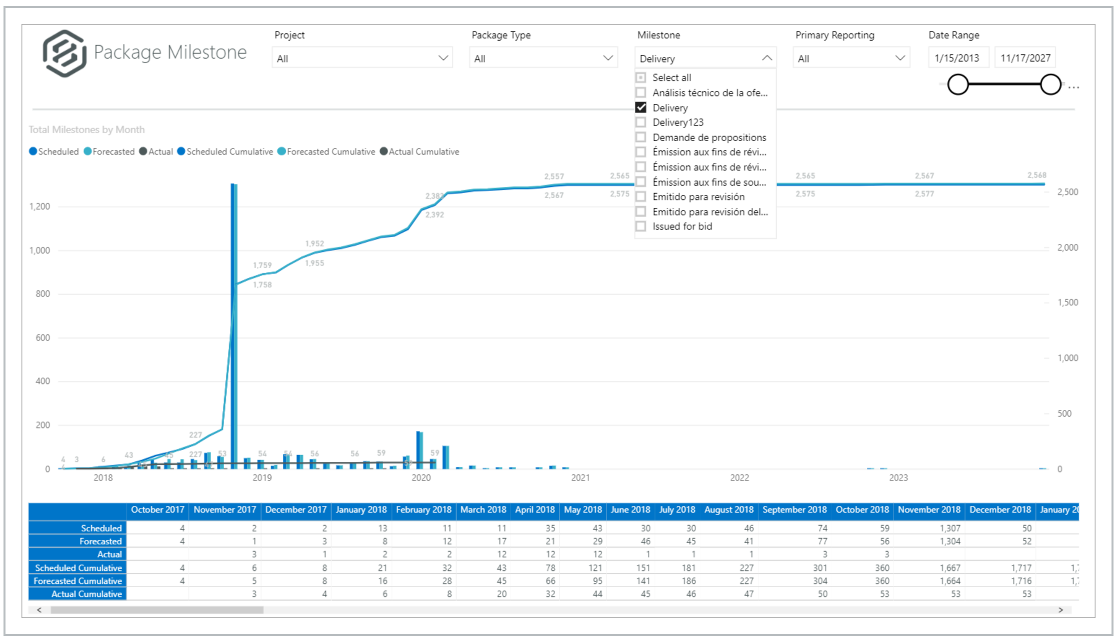
2. Select a **Project drop-down** title.
   - Note you may also scroll to search for a project or type in a project name in the search bar to select a project
3. Click **Select All**.
4. Close the Dashboards panel.
   - The summaries, graphs and data presented here are specific to this project
   - You should see the updated Package Milestone dashboard as shown below



5. From the Milestone drop-down list, deselect all but the Delivery item.

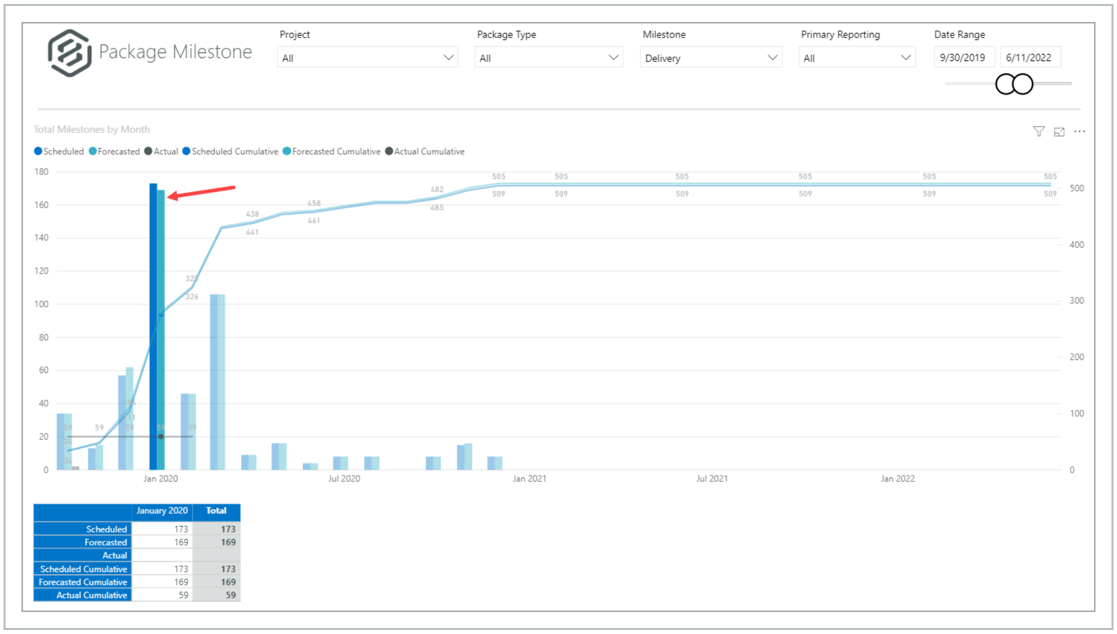


6. The graph now changes:

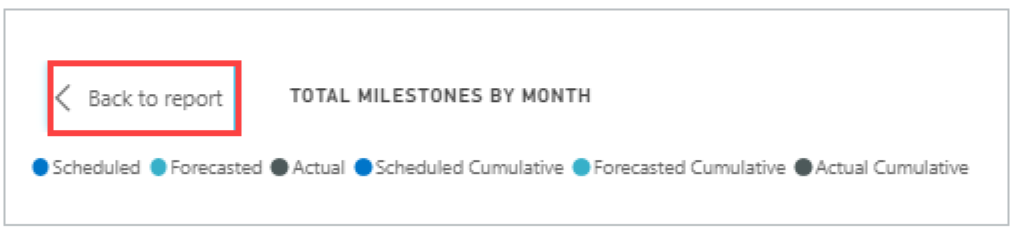


7. Change the Date Range to a shorter period of time.

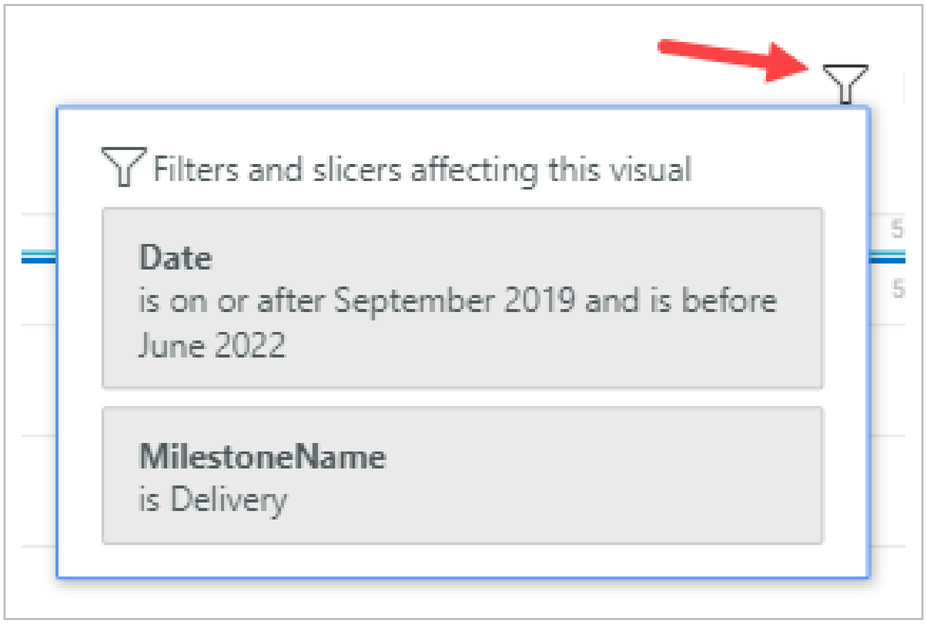
8. Click the light blue colored **Forecasted Cumulative column for the tallest month**. Your report should look like something like this:



9. Click the **Focus** icon for a better view of the graph.
10. Click **< Back to Report** to return to the main view.



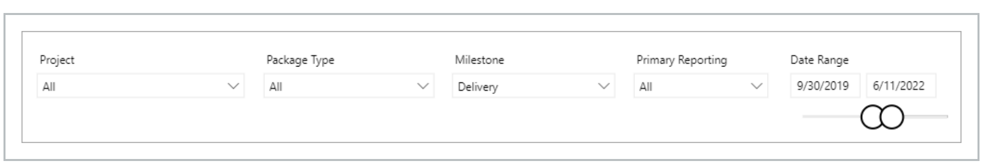
11. Click the **Filter** icon, on the upper right side of the graph.
12. Notice now the two filters that appear, Date and MilestoneName. Click **outside the box** to close the dialog box.



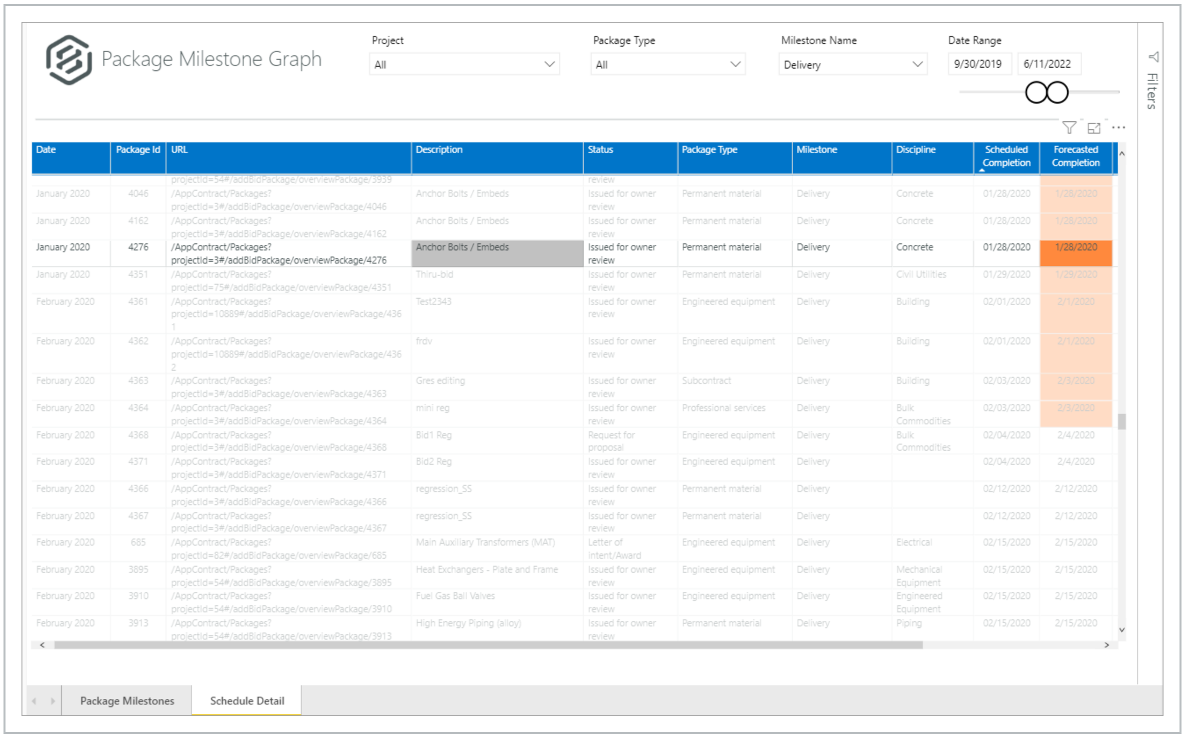
Package Milestone Header Values

The following table provides explanation of scheduled, forecasted, actual and cumulative (scheduled, forecasted and actual) packages at user-defined milestones.

Term	Definition
Project	Identifies the project.
Package Type	Identifies the project options.
Milestone	Identifies the user-defined step in the project.
Date Range	Dates, as selected in the calendar.



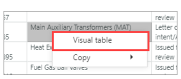
Click the **Schedule Detail** tab at the bottom of the page.



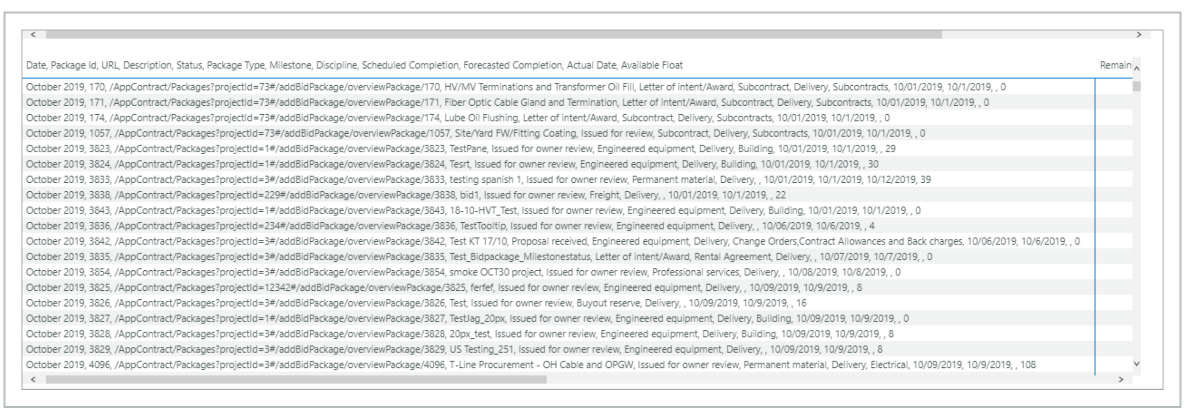
- In this view, line item level detail is available with the ability to link back to other InEight applications. Filtering, sorting and adjusting column width are options available for further ease in analysis.

Previewing Meta-data

Right-click on any header, and then select **Visual table** to view the meta-data further.



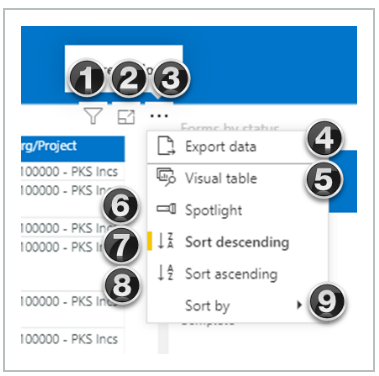
Detailed data will appear:



Press **<Back to report** to return to the default view.

While some dashboard graphs offer the ability to Drill Up, Drill Down, Go to the Next Level of the Hierarchy, and Expand all down one level in the Hierarchy, most other graphs include the following options:

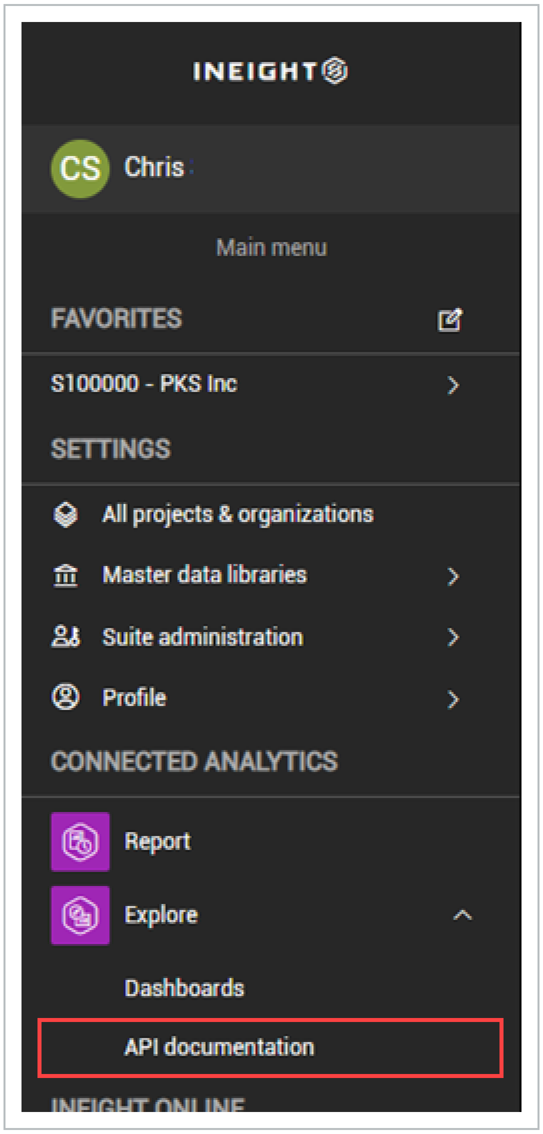
	Term	Definition
1	Filter	Filters and slices data in a visual.
2	Focus mode	Expand one visual in the dashboard.
3	More options	Opens additional options.
4	Export Data	Export data only to Excel (not visuals).
5	Show as a Table	Shows data/chart in a larger view.
6	Spotlight	Focuses dashboard on one specific visual.
7	Sort descending	Sort data in descending order.
8	Sort ascending	Sort data in ascending order.
9	Sort by	Allows you to sort by status or form.



1.7 API DOCUMENTATION

1.7.1 API Documentation Overview

From the home landing page, click the **Main menu** icon (☰), and then click Explore > **API Documentation**.



A new browser window opens to the InEight Knowledge Library [Explore Resources tab](). In the API Documentation section under the InEight product are the documents that represent each data endpoint InEight offers for self-service reporting.

To access a report, in the API Documentation section, click the + icon for the product to expand the list, and then select a file name. The document opens in a new browser window. Each API document includes an Overview of the selected API, a table of Relationships and Dependencies, Details, Supported Filters, API Fields and Field Descriptions, along with a Sample and Data Validation when applicable.

CUSTOM DASHBOARDS

2.1 CUSTOM DASHBOARDS

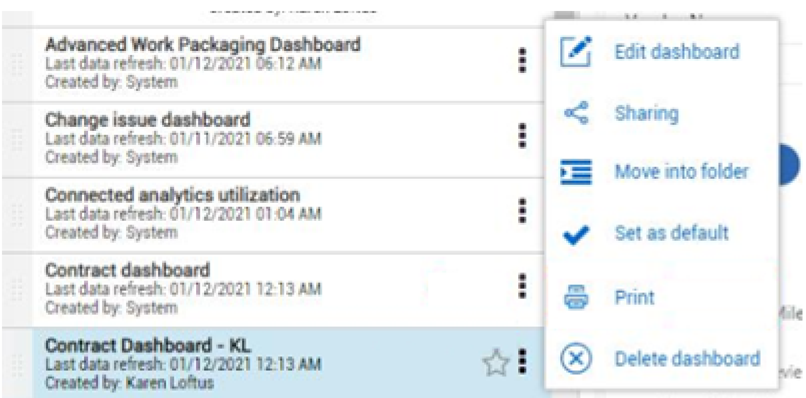
In Explore, you can edit the standard dashboards in order to create new custom dashboards and visualizations by modifying standard dashboards to meet the needs of your project. You cannot create dashboards from scratch, but you can edit the standard dashboards and save them as new custom dashboards.

2.1.1 Edit Dashboard

The following steps walk you through how to edit an existing dashboard to create a new dashboard.

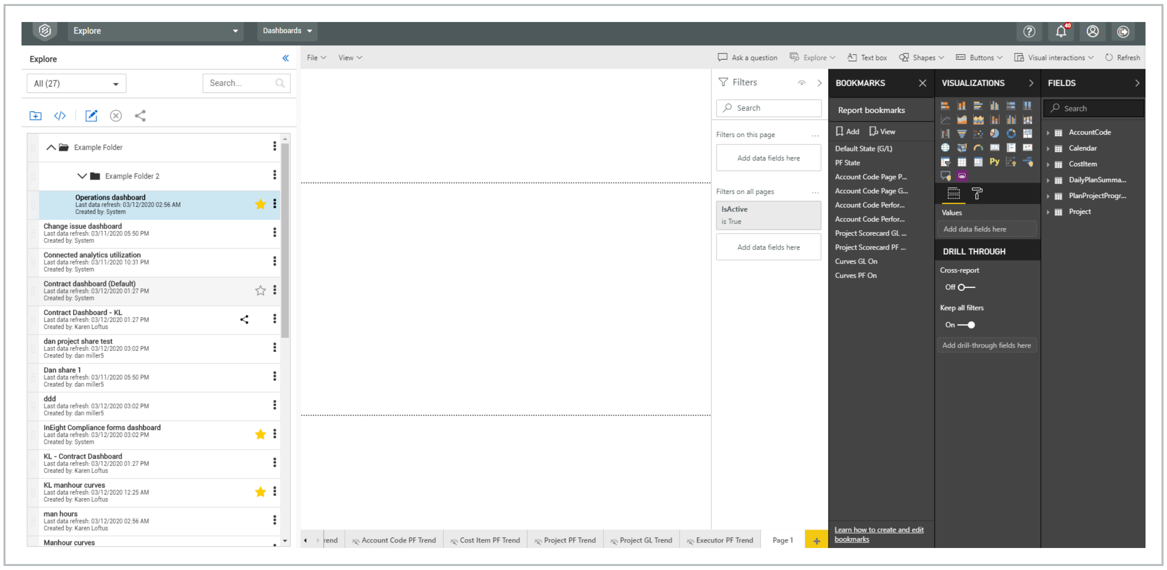
2.1 Step by Step 1 — Edit a Dashboard

1. From the Dashboards page, click the **Context menu** ellipses next to the Operations dashboard.
2. Select **Edit dashboard**.



3. The Visualization and Fields slide-out panels open on the right side of the screen.
   - A yellow New page icon appears next to the page number at the bottom of the screen
4. Click the **New page** icon to add a new tab.

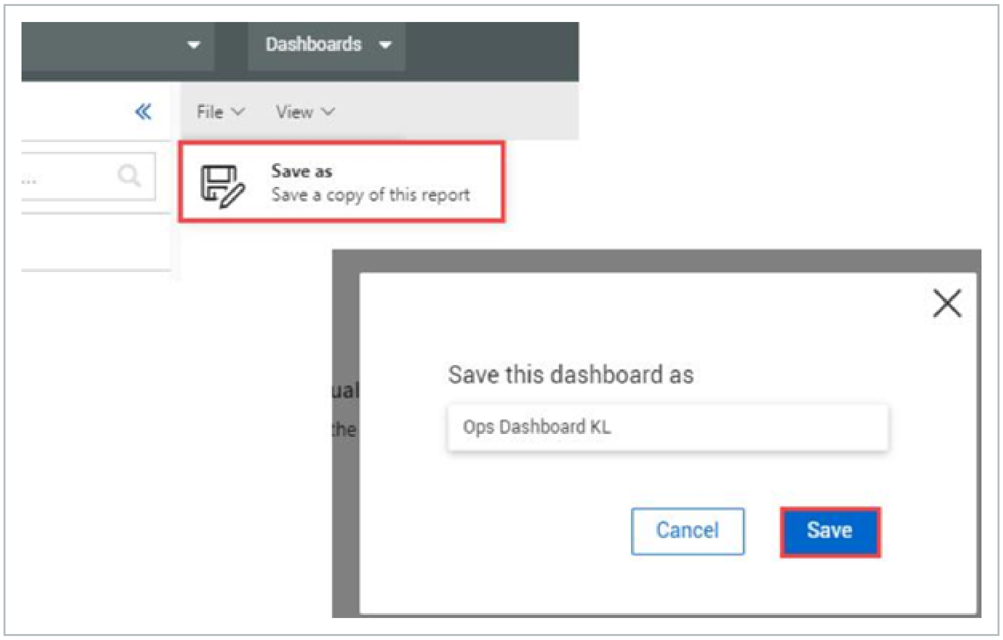
- Your screen will now look something like this



5. Double-click on the default page name and type in **man hours**.

   - Your tab will now look like this:

6. From the drop-down menu, click File > **Save as**.



7. In the dialog box, name the custom dashboard, and then click **Save**.

2.1.2 Dashboard Customization

From the Visualizations and Fields slide-out panels, you can add chart, graph and card visualizations to your dashboard and populate them with the appropriate data fields.

You cannot change the data source for the dashboard. The dashboard comes pre-connected to a dataset you may use to edit or add visualizations and filters.

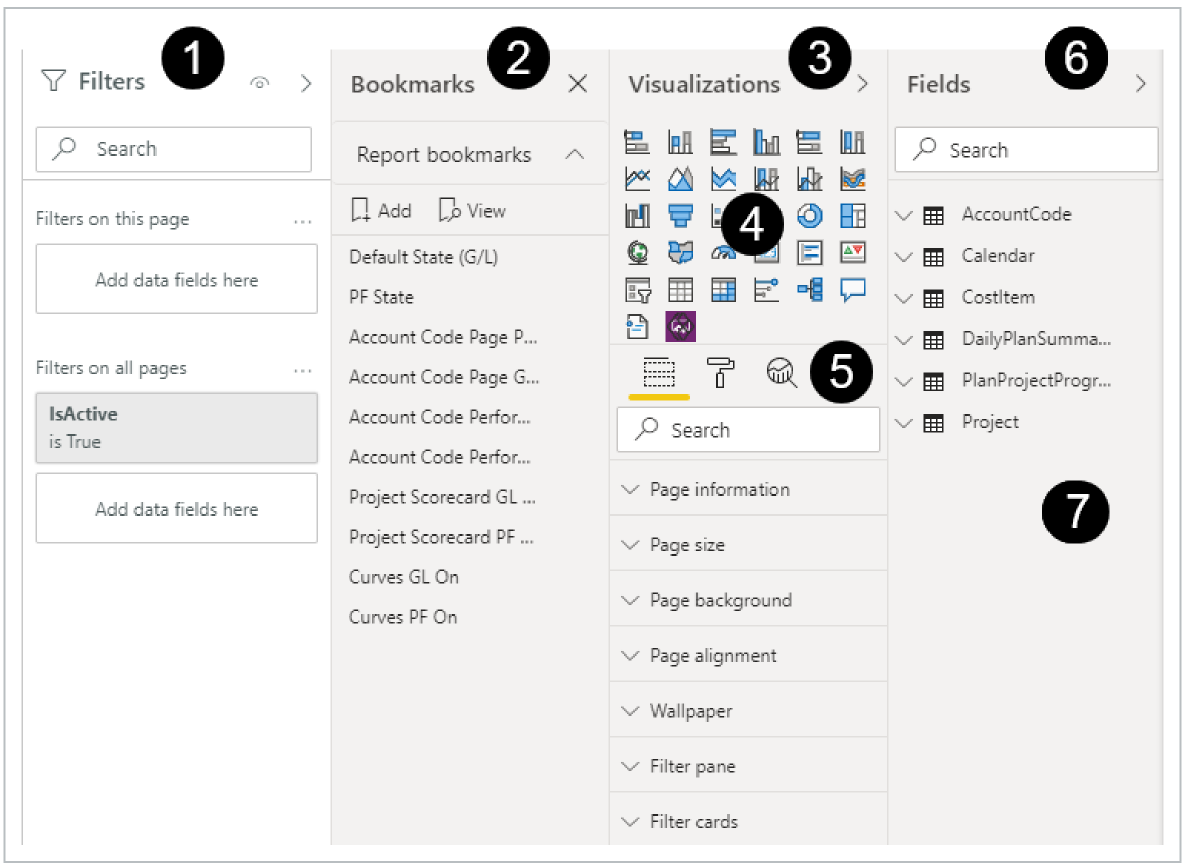
Visualizations and Field slide-out panels are utilized for the following unique purposes:

Overview - Filters, Bookmarks, Visualizations and Fields Slide-Out Panels

	Term	Definition
1	Filters slide-out panel	Various ways to cut the data using selections from the Fields slide-out.
2	Bookmarks slide-out panel	Customizable saved dashboard views to quickly access frequent dashboards.
3	Visualizations slide-out panel	Charts, Graphs, and Cards selection for dashboard tab.

Overview - Filters, Bookmarks, Visualizations and Fields Slide-Out Panels (continued)

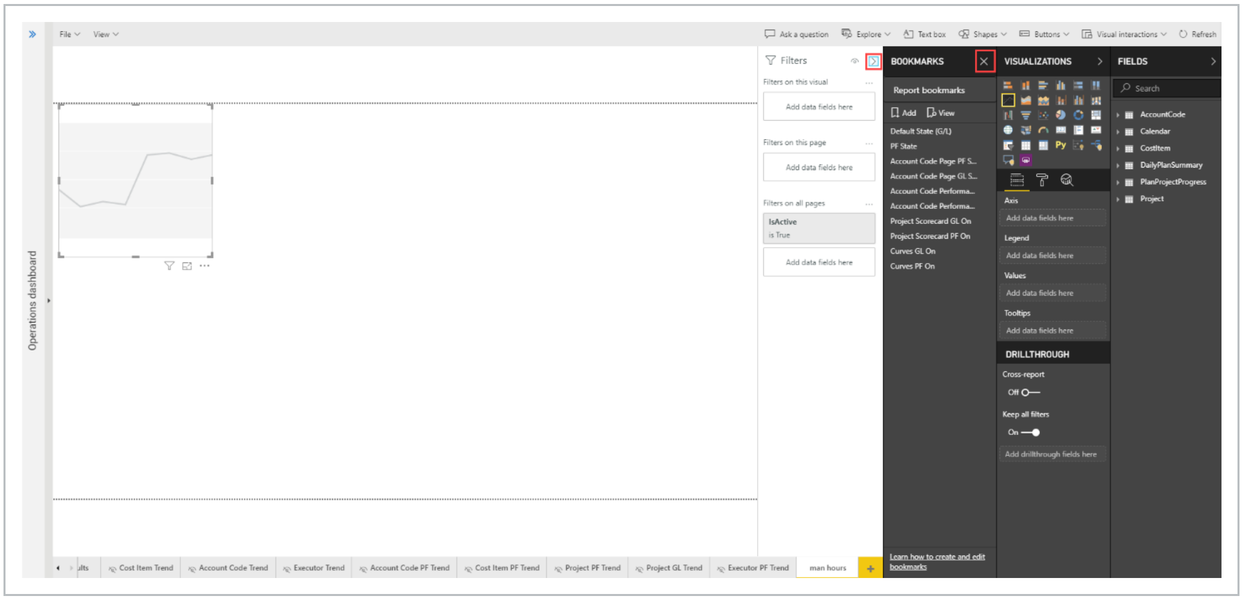
	Term	Definition
4	Charts/Graphs	Various charts, graphs, an PowerApps for PowerBI.
5	Fields, Format, Analytics	**Format** provides page information. **Fields** allows for adding value data fields and drill through capability. **Analytics** modifies the lines (min, max, average, etc.) shown in the selected chart or graph.
6	Fields slide-out panel	Contains data fields to add to your visualizations to report on in your dashboard.
7	Data Fields	Data from InEight Project Suite to add to fields such as Axis, Legend, Values, etc. under the Visualizations slide-out panel.



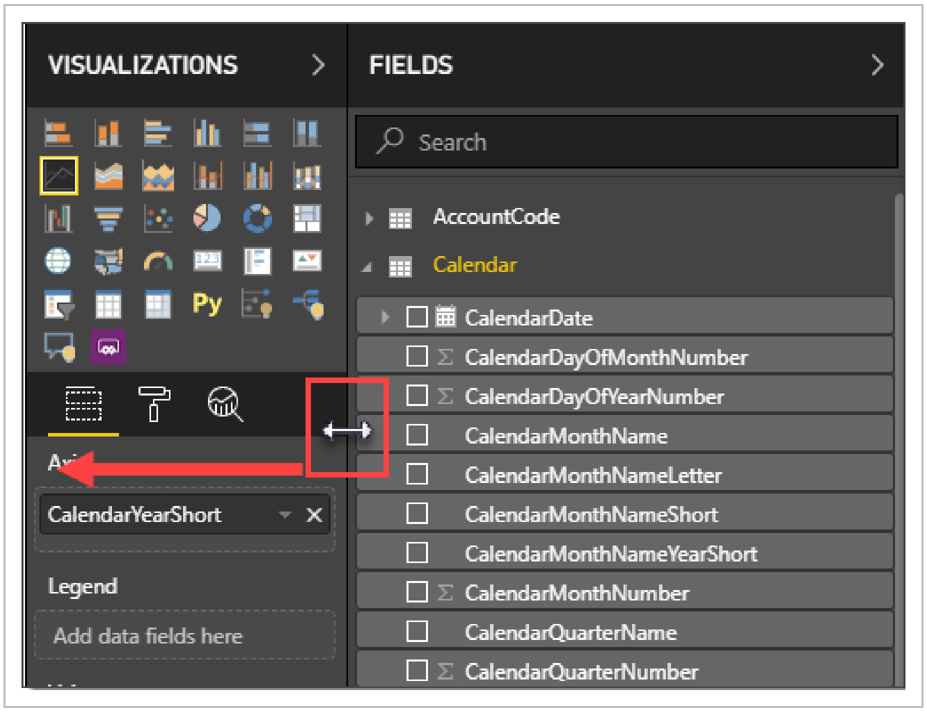
The following Step by Step walks you through adding a graph visualization to your dashboard reporting on Project Progress and man hours.

2.1 Step by Step 2 — Create a Graph

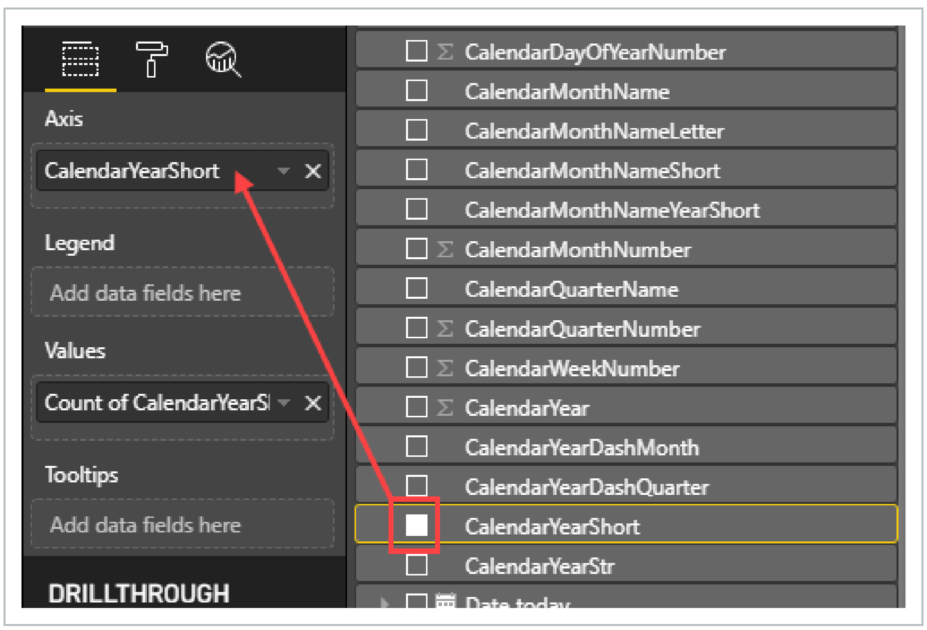
1. Under the tab you created in Step by Step above, on the Visualizations slide-out panel select the **Line chart** visualization.
2. To make more space, hide the **Dashboards** slide-out panel, **Filters** slide-out panel and close **Bookmarks**.



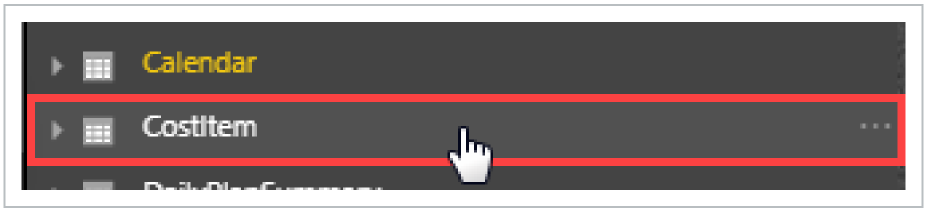
3. Enlarge the Fields slide-out panel by sliding the **left border** toward the left to increase the Fields selection area.



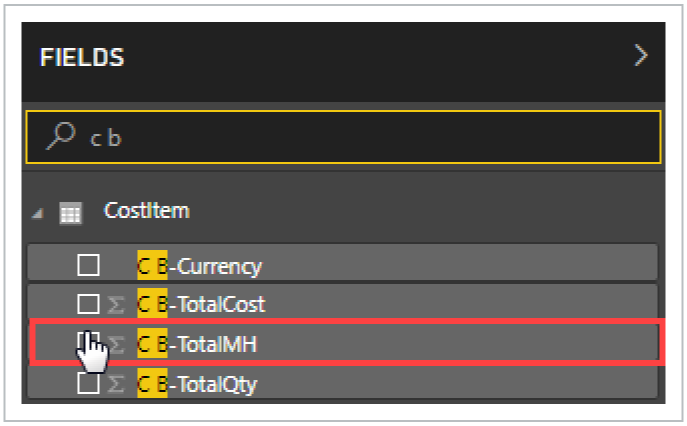
4. Under the Fields slide-out panel, navigate to the Calendar and click the **CalendarYearStr check box**, and the selection will populate in the Axis.



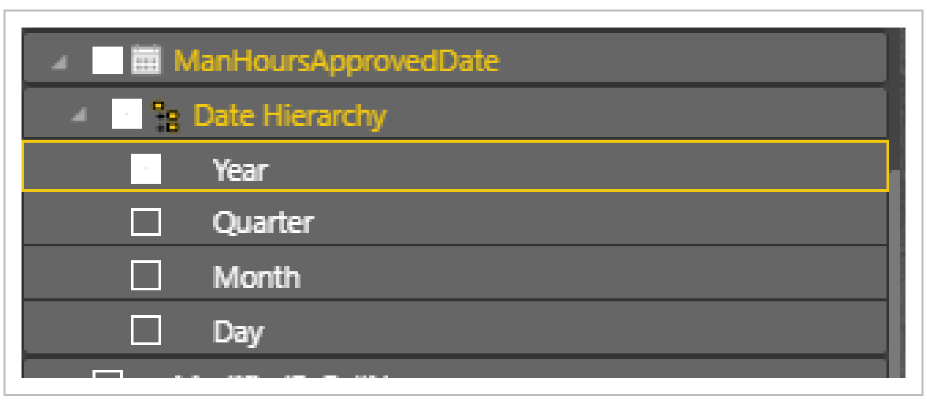
5. Close the Calendar Field and scroll down and open the **CostItem** Field side arrow.



6. In the Search bar under Fields type **C B-**.



7. Select the **C B - TotalMH check box** to add it to the Values section of the Visualizations slide-out.
8. Clear the Search bar and close the CostItem field.
9. Open the Daily Plan Summary Field and select **ManHoursApprovedDate**. Modify the Date Hierarchy to match this:

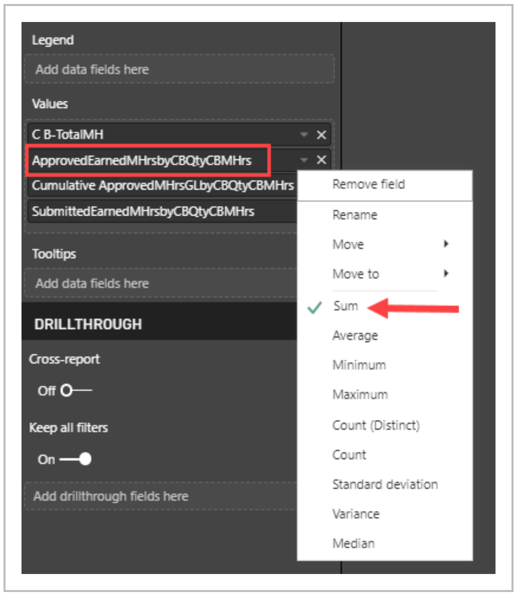


10. Close the DailyPlanSummary field.
11. Expand the graph size by pulling the lower right corner of the graph downward.
12. Open **PlanProjectProgress**and select the following fields:

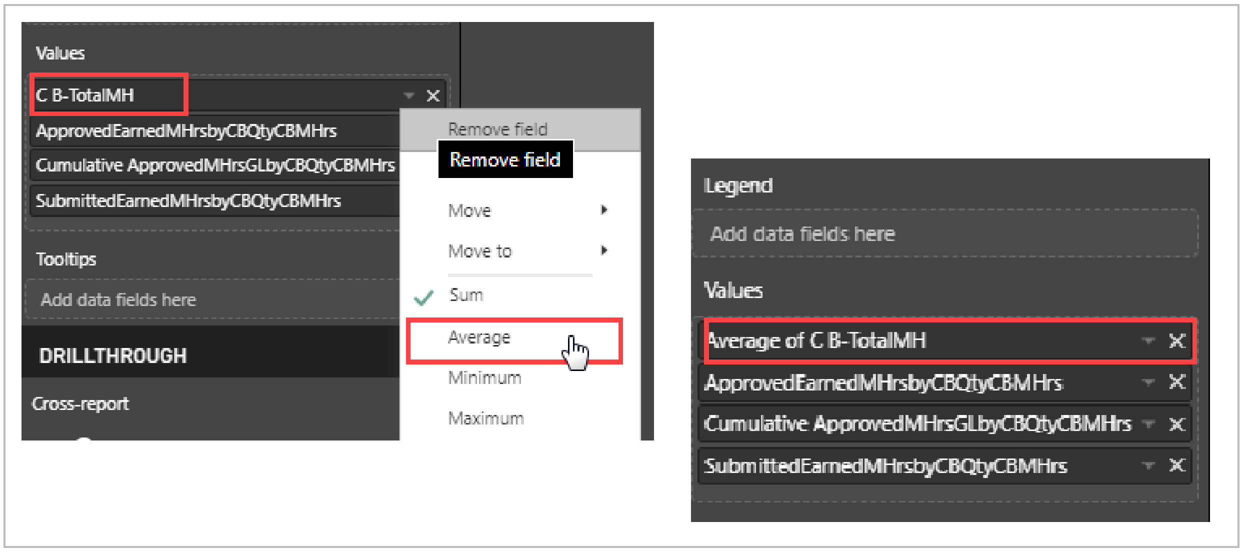
a. **ApprovedEarnedMHrsbyCBQtyCBMHrs**
b. **Cumulative ApprovedMHrsGLbyCBQtyCBMHrs**
c. **SubmittedEarnedMHrsbyCBQtyCBMHrs**

- On the dashboard on the left, the graph displays your submitted earned man hours and compares that against approved earned man hours

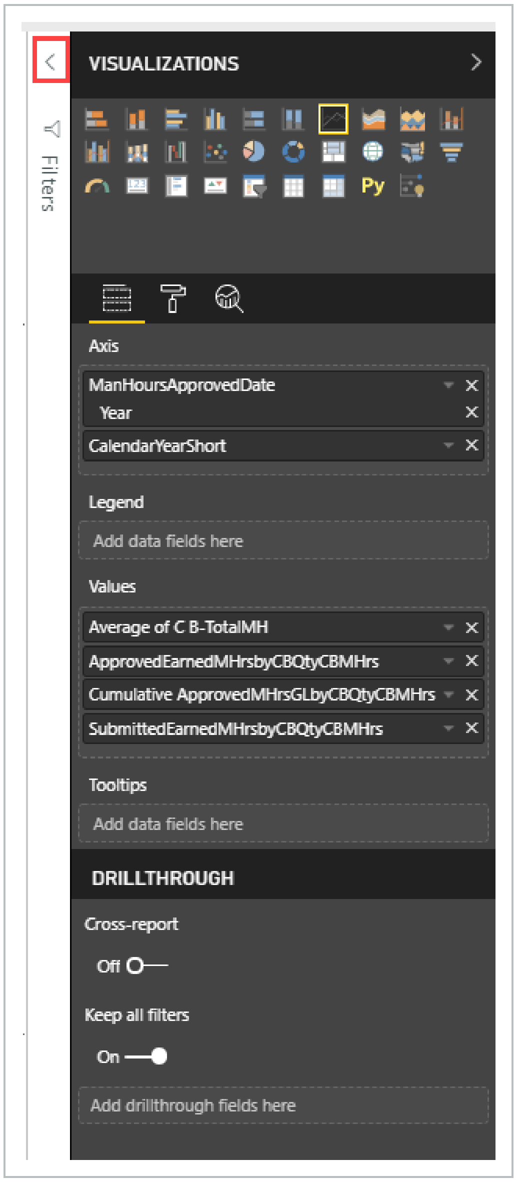
13. By clicking each **Values** drop-down fields, you will see each is intuitively using the mathematical sum function.



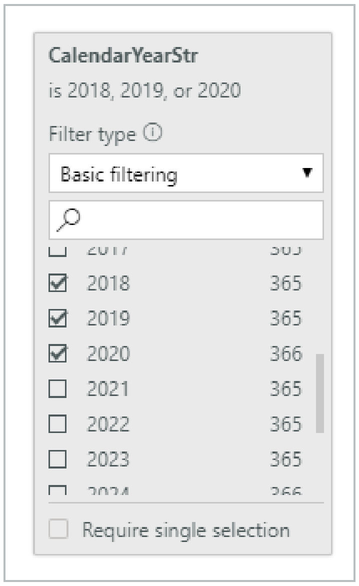
14. On the C B-TotalMH drop down, change the selection from Sum to **Average**. Notice how the field name changes.



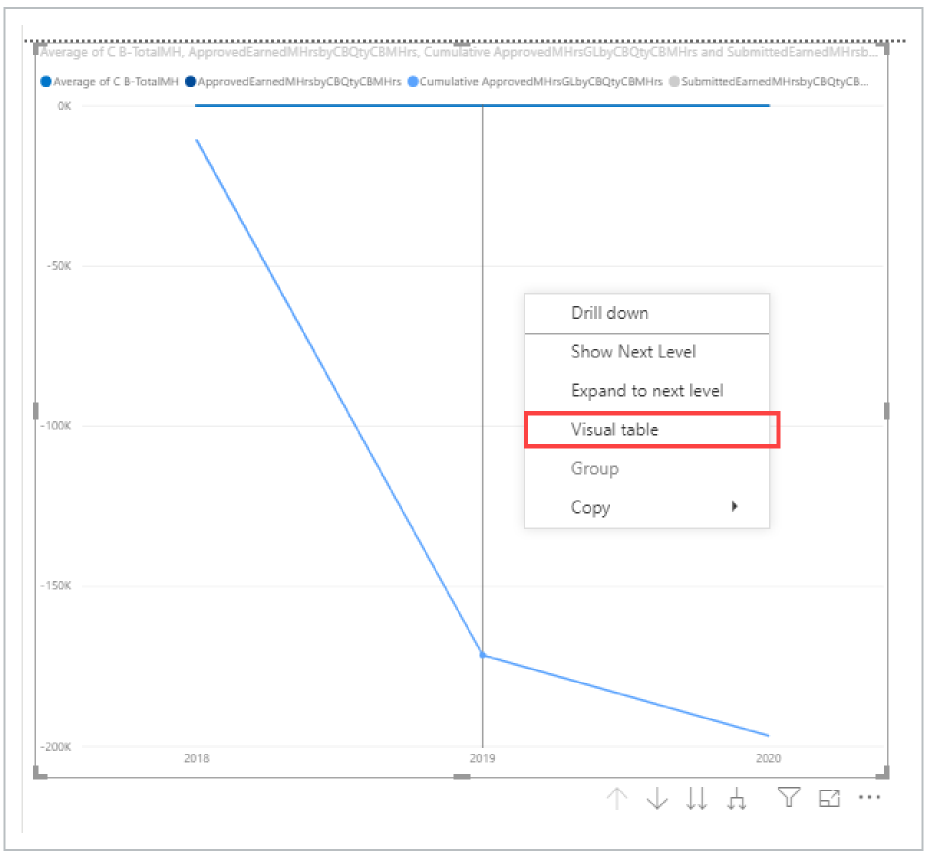
15. Open the **Filter slide-out**.



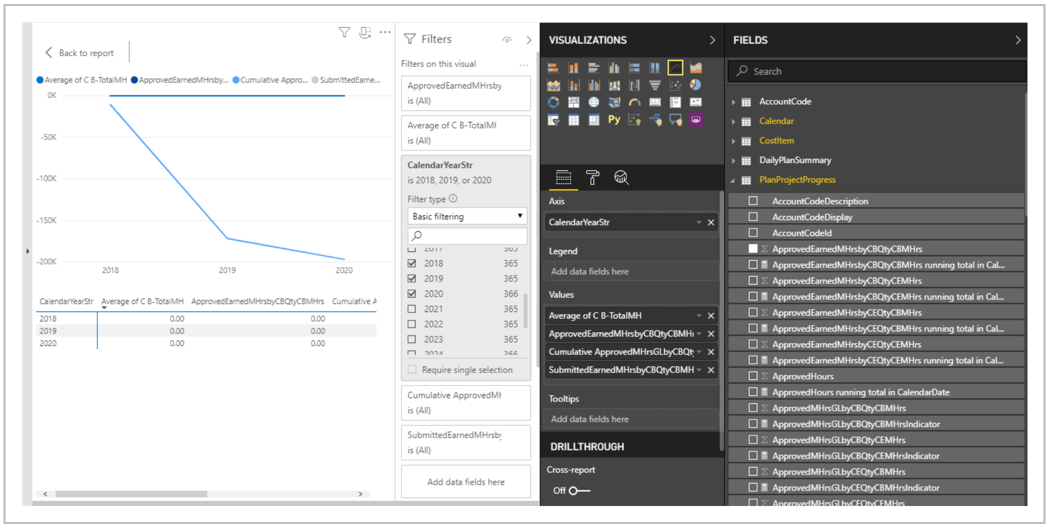
16. Expand the CalendarYearStr field by clicking on the **drop down**. Using Basic filtering, select years **2018, 2019 and 2020** to abbreviate the reporting years chart.



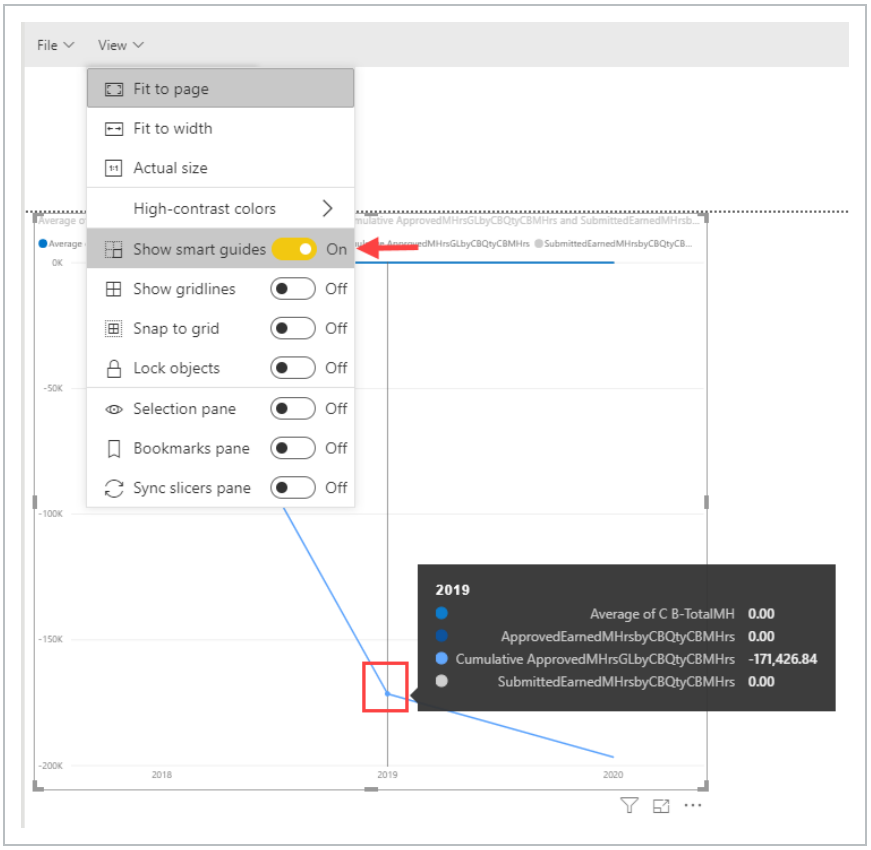
17. Right-click inside your chart and select **Visual table**.



- Your chart should look similar to this:



18. Click **< Back to Report**.
19. In the upper left corner, note the View options available in the drop-down. Change the Show smart guides toggle to **On**.
    - Doing so makes a vertical bar appear each time it bisects a point in the graph
    - Clicking on the bisected point brings up the data, as shown below



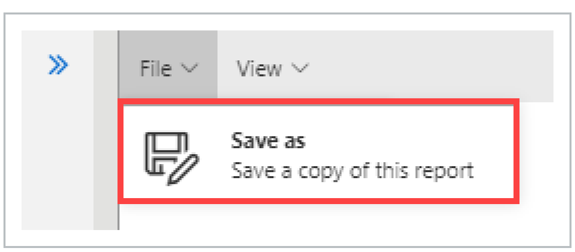
20. From the View drop-down, turn the Bookmarks Pane toggle to **On**.

2.1.3 Save Dashboard

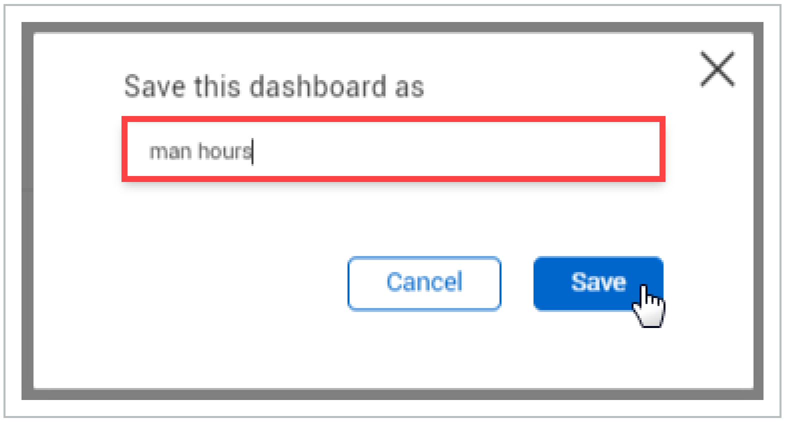
There are two ways to save a dashboard.

First, if you are leaving a newly created report where you have modified data, you will receive a pop-up where you can confirm your desire to save your change.

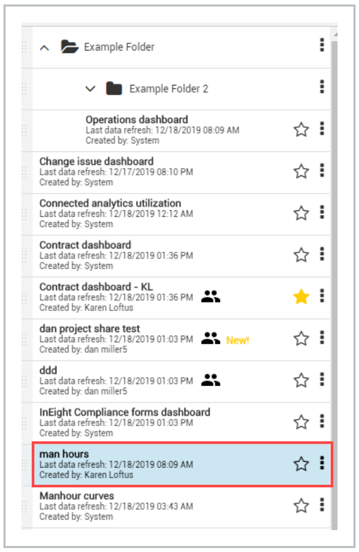
Click the **File > Save As** drop down.



If Yes in selected, save with a new dashboard name and click **Save**.



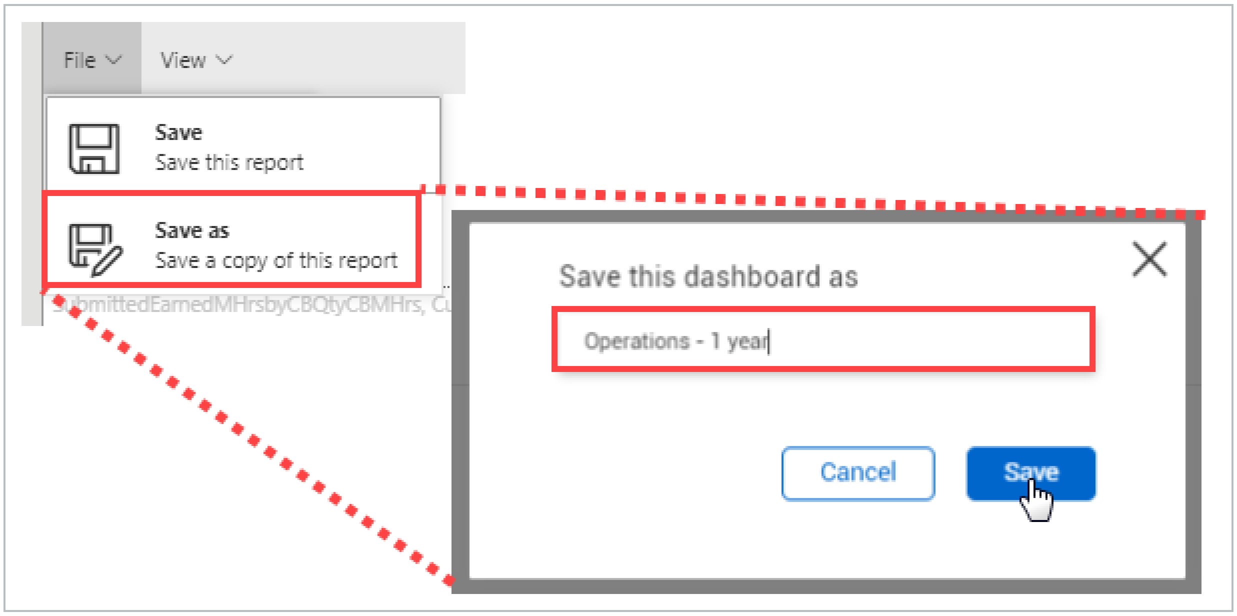
- Your dashboard will appear on the left slide-out panel alongside your other dashboard



Alternatively, if you are leaving an existing report where you have modified data, you will receive a pop-up where you can confirm your desire to save a copy of your change.

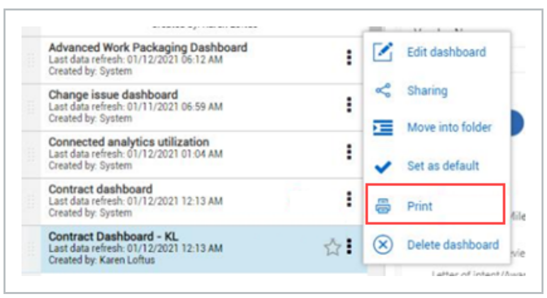
Click the **File > Save As** drop-down.

Add a name for the new dashboard and click **Save**.



2.1.4 Dashboard Printing

To print a dashboard, select the **three dot ellipses** next to a dashboard you created.



- The dashboard print settings will default the orientation to Portrait. At times, selecting Landscape will provide a more full page view

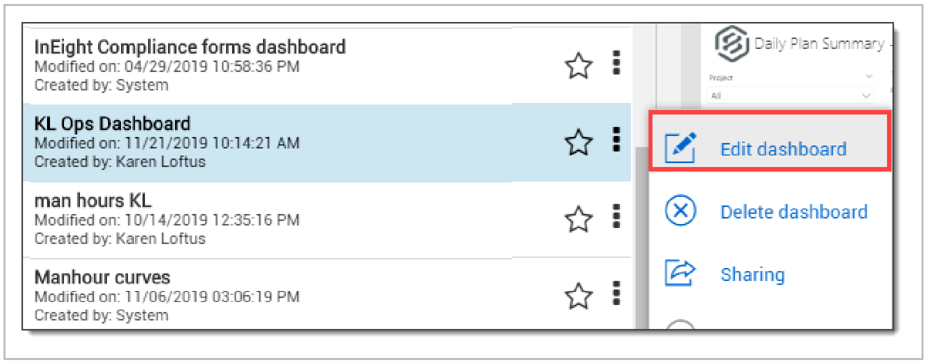
TIP	To determine what fields are in a given report, click the Report, look at the Fields pull-out, and open the yellow colored drop-down. Search through the listing for the field(s) with a solid check-box.

2.1.5 Add a Bookmark

From an edited dashboard, you are able to further personalize your dashboard by adding a new field. In our example, Approver 1, Ajay GK is a frequent approver. We want to quickly view projects specific to him. We will do that by adding a new field onto the dashboard then adding a new Bookmark tied to him. That way, we can quickly see that view as easily as the default mode, or by clicking on other default Bookmarks. Let's see how we did it.

2.1 Step by Step 3 — Add a Bookmark

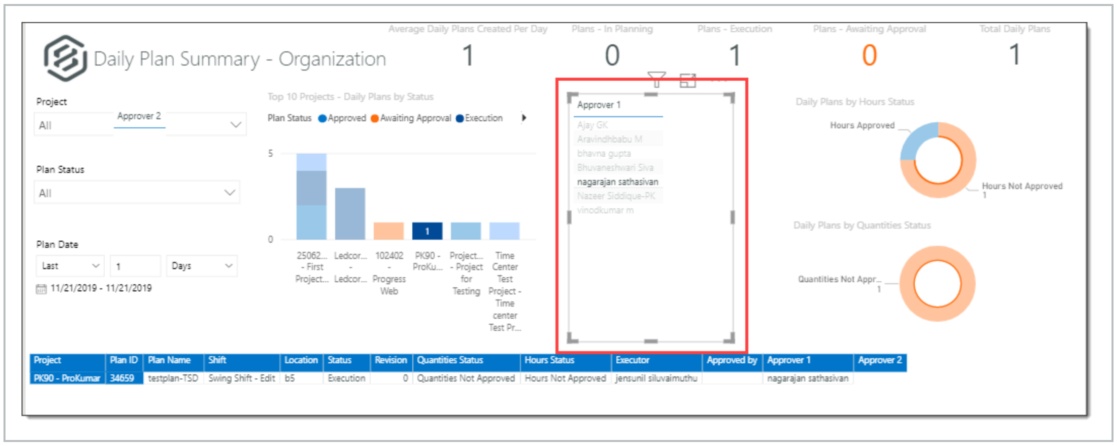
1. Ensure you are in the Edit dashboard mode of a saved, renamed dashboard.



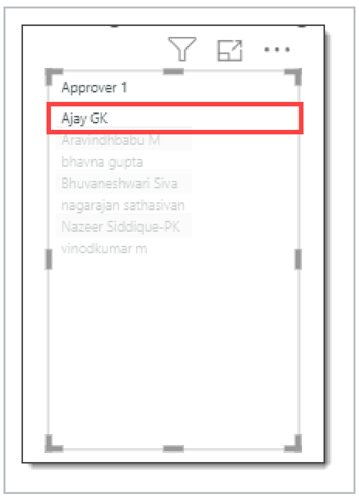
2. Close the Dashboard pane by clicking the **double blue arrows**.

3. Search the Fields pane drop-down lists to locate the field to add, in our case under the DailyPlanSummary, we selected **Approver 1**.
4. **Drag that field** onto the dashboard.

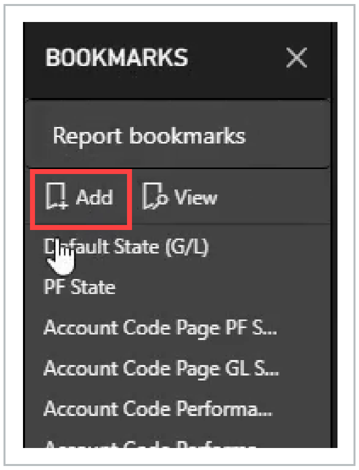
5. Using the gray colored handles that surround each attribute, move and re-size it and/or other attributes until the dashboard fits to your liking.



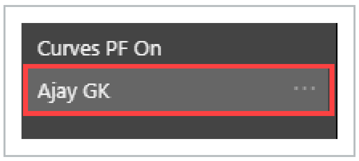
6. Highlight the desired Approver 1, in our case Ajay GK.



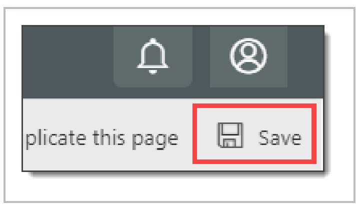
7. On the Bookmarks pane, click the **Add** icon, which will place a re-nameable bookmark at the bottom of the Bookmark pane.



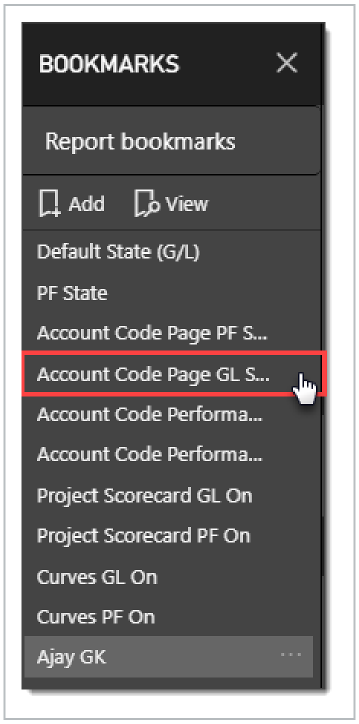
8. Double-click the **new Bookmark** to re-name it.



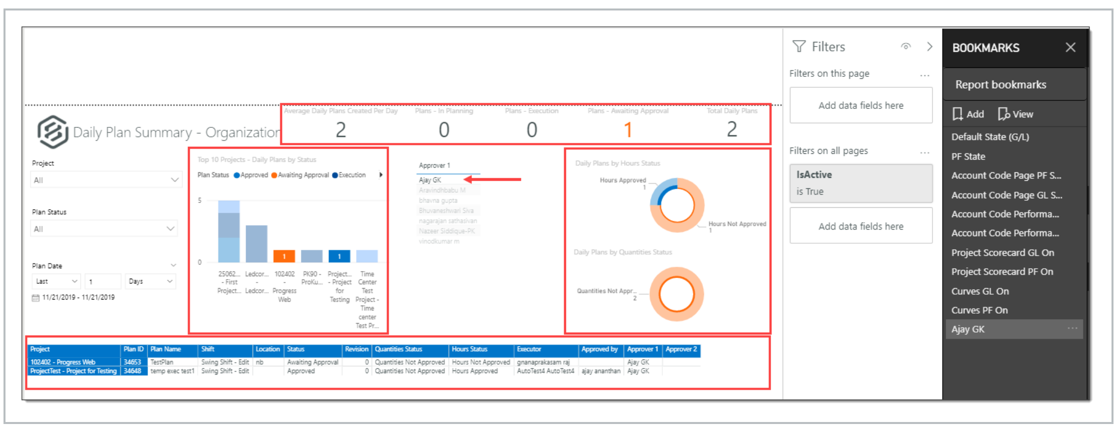
9. Save your dashboard by clicking the **Save** icon.



10. Toggle to another bookmark on the Bookmarks tab.



11. Then **toggle back** to your newly added Bookmark. Not only will that Approver 1 be selected, but all reports and data are filtered to those projects where he is the Approver 1.

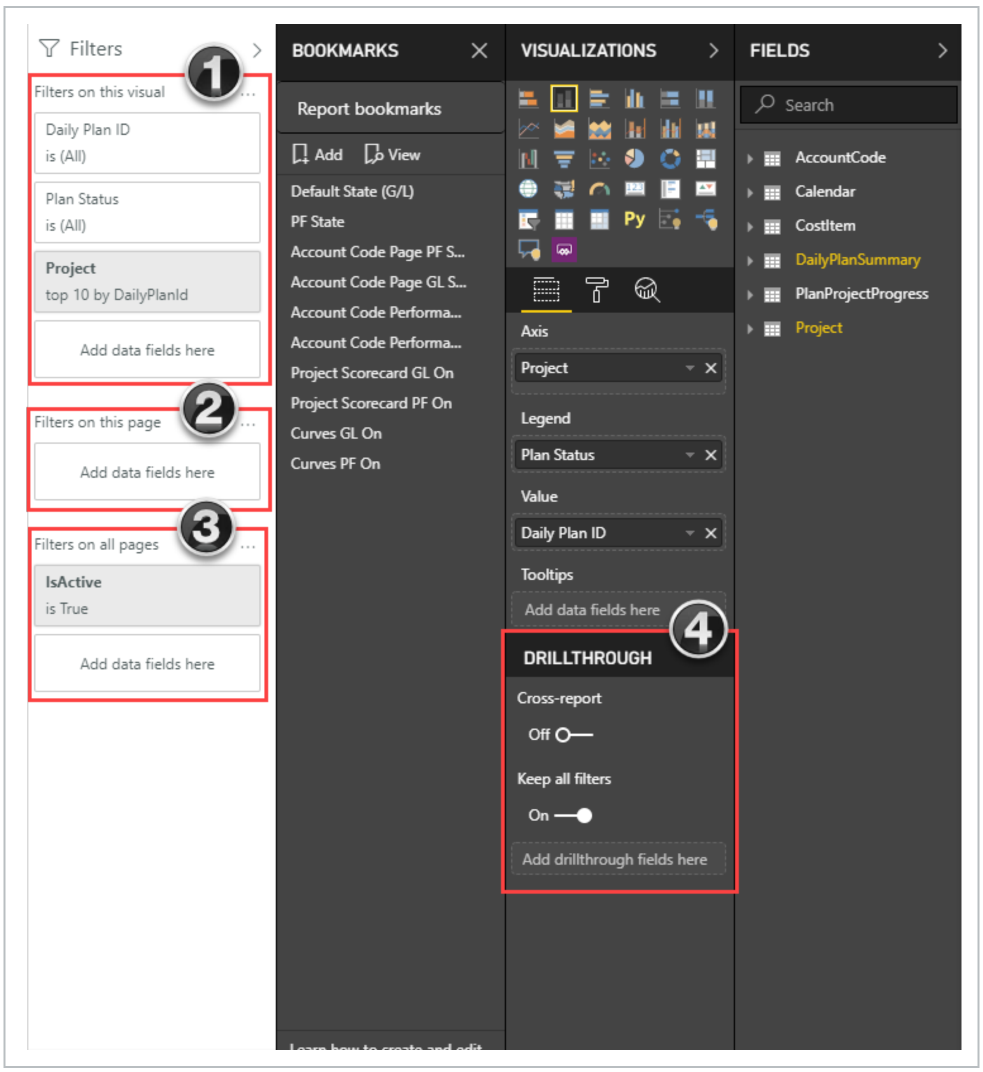


2.2 DASHBOARD FILTERING

The dashboards in Explore have advanced filtering abilities to make viewing easier and more customized.

You can filter the information on your dashboards on four different levels:

Filter	Definition
Visual Level	Filters a single visual on a dashboard. You can select the date range, account codes, approvers, etc. that you want shown.
Page Level	Filters all the visuals on a single page. You can use this to filter by areas on the project, date range, executor, etc.
Report Level	Filters all pages in a report. You can use this to filter a report by project, date range, remaining MHrs, etc.
Drillthrough	Used to focus on one aspect of the project. Any other page or visual that contains this drillthrough value can be redirected to this drillthrough page for a more focused and up-close view.



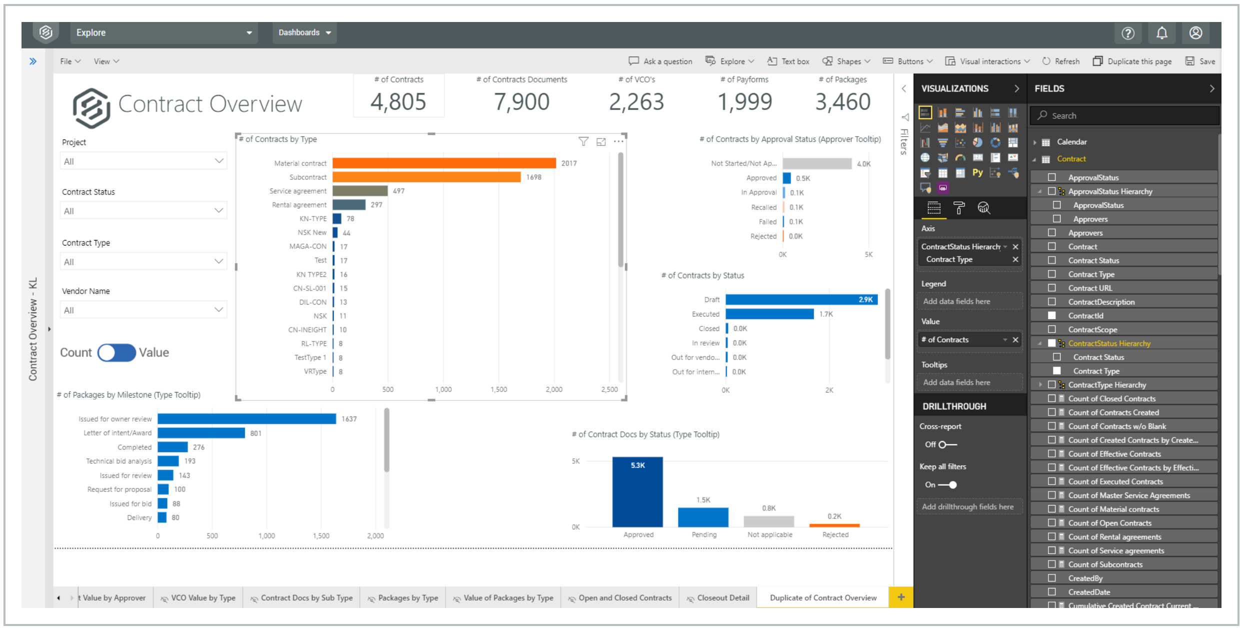
Drilling down on report data to the meta-data level, can assist in your analysis. Most of the visualizations on the dashboards display data at a summary level. Drilling down into the visualizations allows you to see the data at the detail level.

To enable us to view filtering and drill down data better, complete these preliminary steps.

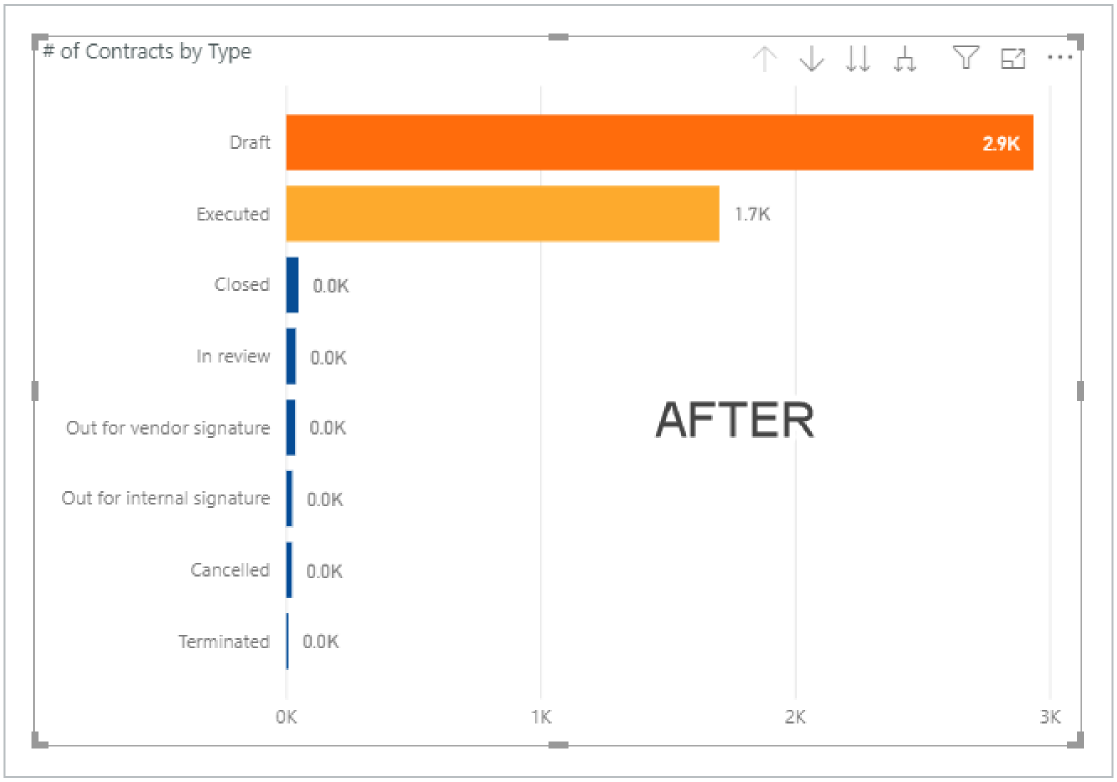
2.2 Step by Step 1 — Filter a Dashboard, part 1

1. Navigate to the **Contract Dashboard**, and then select **Edit Dashboard** from the **Context Menu (…)** icon.
2. Save your new dashboard using File > Save As appending the Contract Dashboard file name with your initials.
3. Close the **Dashboards** and **Bookmarks** slide-out panels to give yourself more room to work.
4. Select a **Project**.
5. Select a Contract Status of **All**.
6. Select a Contract Type of **All**.
7. Select a Vendor Name of **All**.
8. Right-click on the Contract Overview tab, and then select **Duplicate Page**.
9. On the duplicate page, delete the following charts:
   - **# of Contracts by ERP Sync Status**
   - **# of VCO's by Status**
   - **# of Payforms by Request Status**
10. By either:
    - Clicking the **ellipses**, and then selecting **Remove**, or
    - Clicking on the chart, and then pressing the **Delete** button on your keyboard
11. Expand the width of the Fields panel.
12. Expand the # Contracts by Type chart.

13. Click on each remaining chart to view Fields used.



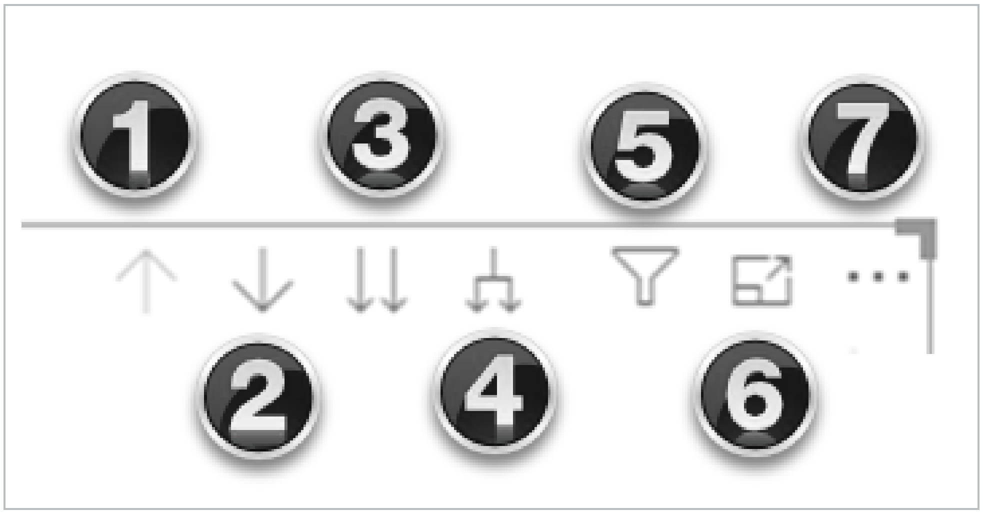
14. On the # Contract by Type chart, click the **Contracts** Field panel, and then add **Status Hierarchy > Contract Status**. Notice how the chart changes.



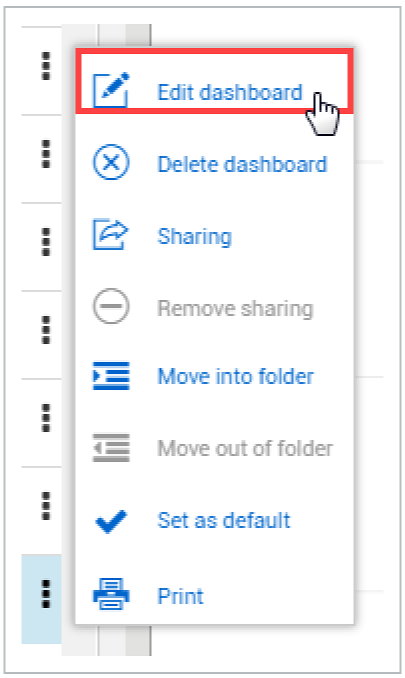
15. Specifically, with the field added, you now have greater ability to filter the data.

2.2.0.1 Filtering Options

#	Filtering Option
1	Drill Up
2	Drill Down
3	Go to Next Level in the Hierarchy
4	Expand all Down one level in the Hierarchy
5	Filter
6	Focus Mode
7	More Options



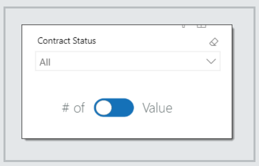
Navigate to the dashboard that you just created and select **Edit dashboard** from the Context menu icon.



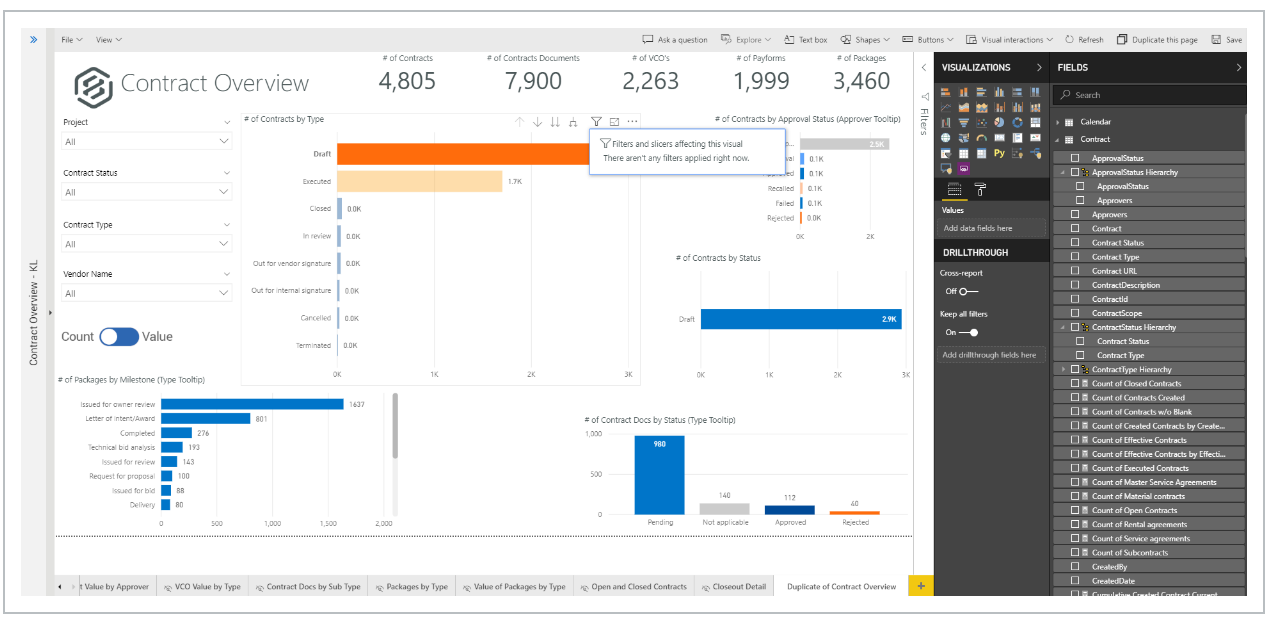
- Note the four types of filters:

Filter Type	Definition
1. Visual Level	Filters on an individual visual.
2. Page Level	Filters on every visual on the report page.
3. Report Level	Filters on all pages in the report.
4. Drillthrough	Filters on a single entity in the report.

NOTE For the remainder of this section, data will be represented by the **Number of Contracts**. Alternatively, by moving the toggle in the other direction, all data would be shown by **Contract Value**. Similar functioning toggles exist in other types of reports for ease in viewing data in an alternate format.

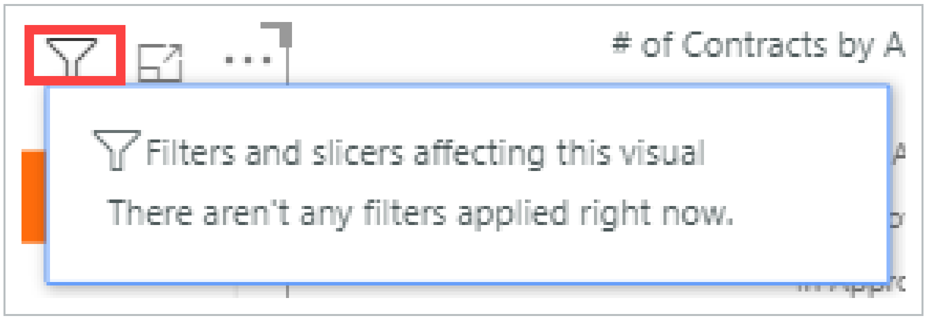


Having followed the previous steps, your screen should now look similar to this:

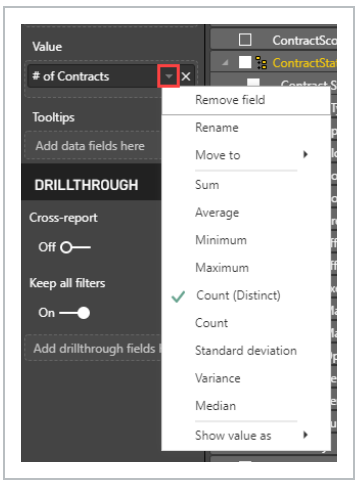


2.2 Step by Step 2 — Filter a Dashboard, part 2

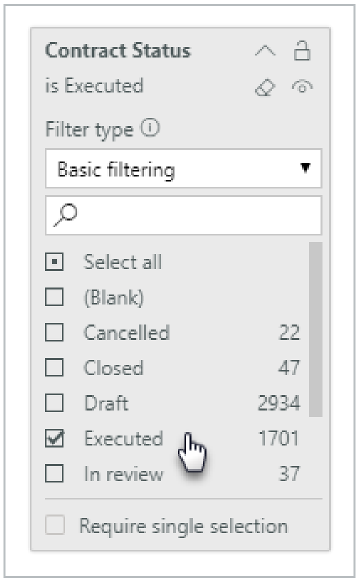
1. Open the **Filters** panel.
2. Click on the # of Contracts by Type **stacked bar chart**.
3. Click on the **Filters** icon and notice you have no filters applied right now.



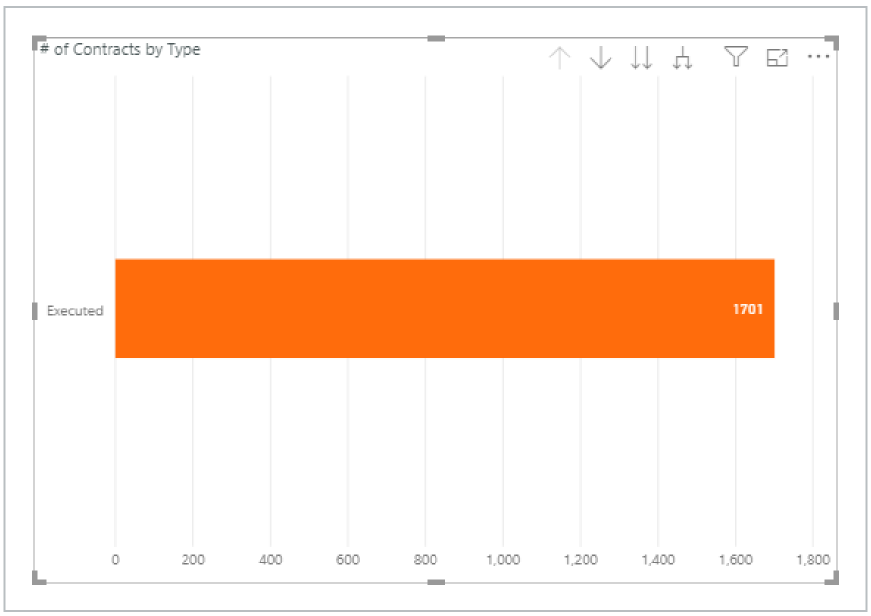
4. Under the Visualizations slide-out panel, click on the **# of Contracts** drop-down to view details of that filter.



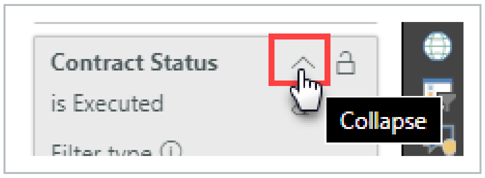
5. On the Visual Filters, click on the **Contract Status** drop-down, select **Executed** to apply the filter.



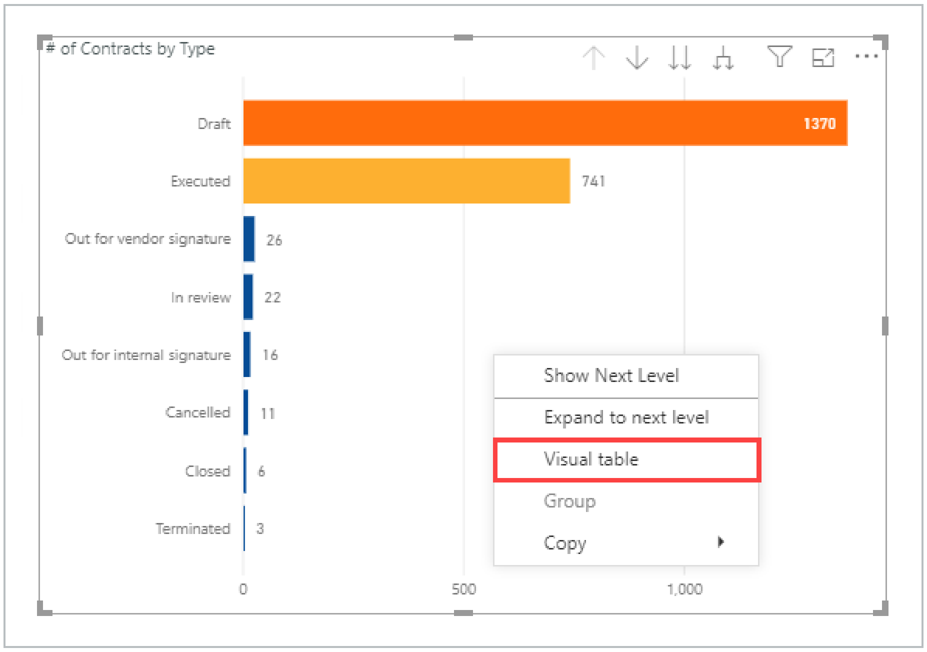
- Notice how this chart changes



6. Change the Contract Status to **Select All**.
7. Collapse the Contract Status filter.

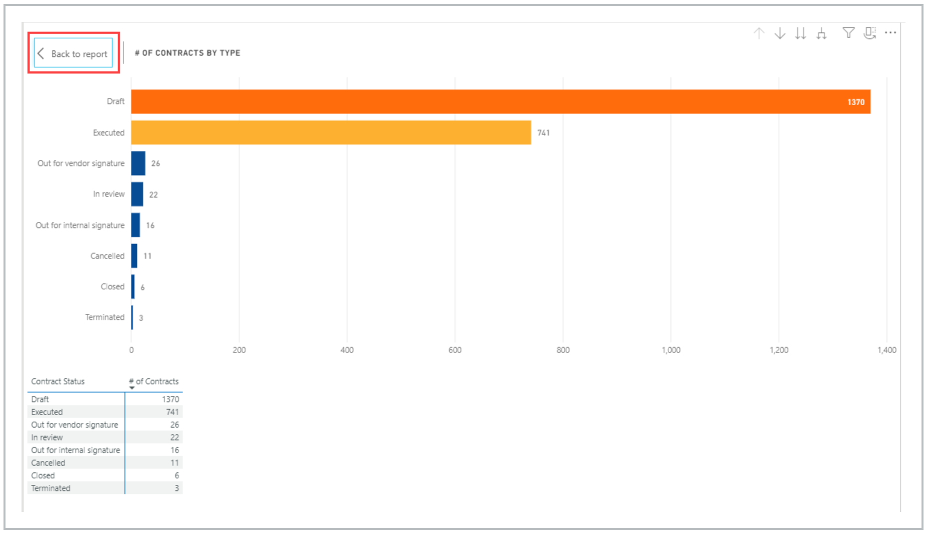


8. Under the filter Contract Type, select 2 options from your drop-down.
9. Within the chart, right-click and select **Visual Table**.

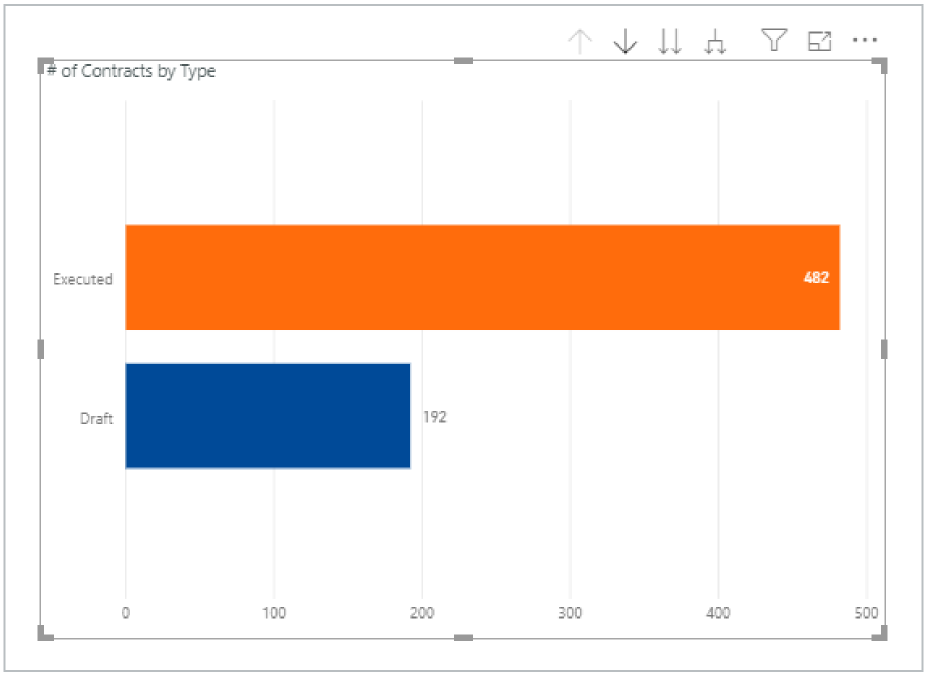


- The # of Contracts by Type chart now only appears, with the actual data for those two contract types shown.

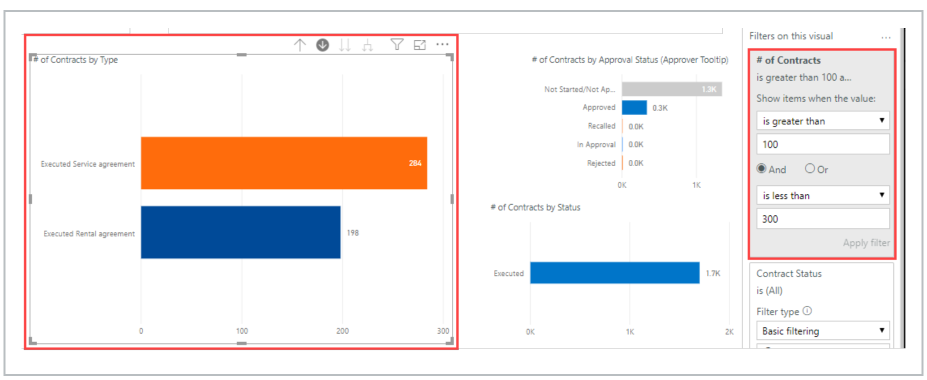
10. Add a third Contract Type, and see how the chart and data changes again.
11. Click **Back to Report**.



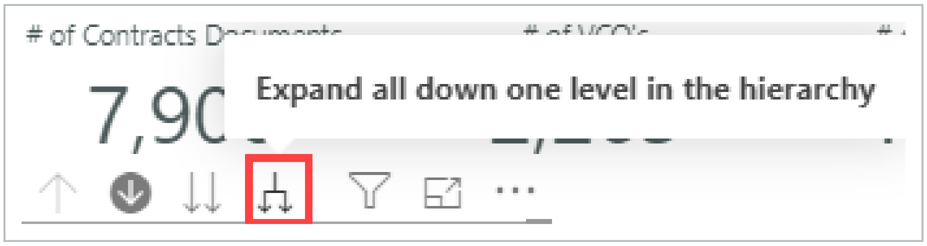
12. Close the **Contract Type** filter.
13. Click **File > Save** to save this dashboard.
14. Open the **# of Contracts** filter.
15. Show items that are **greater then 100 and less than 300**.
16. Click **Apply Filter**.
    - The newly filtered chart appears. In this case, Executed is greater than 300. Why do 482 Executed Contracts appear? Let’s drill down further to find out



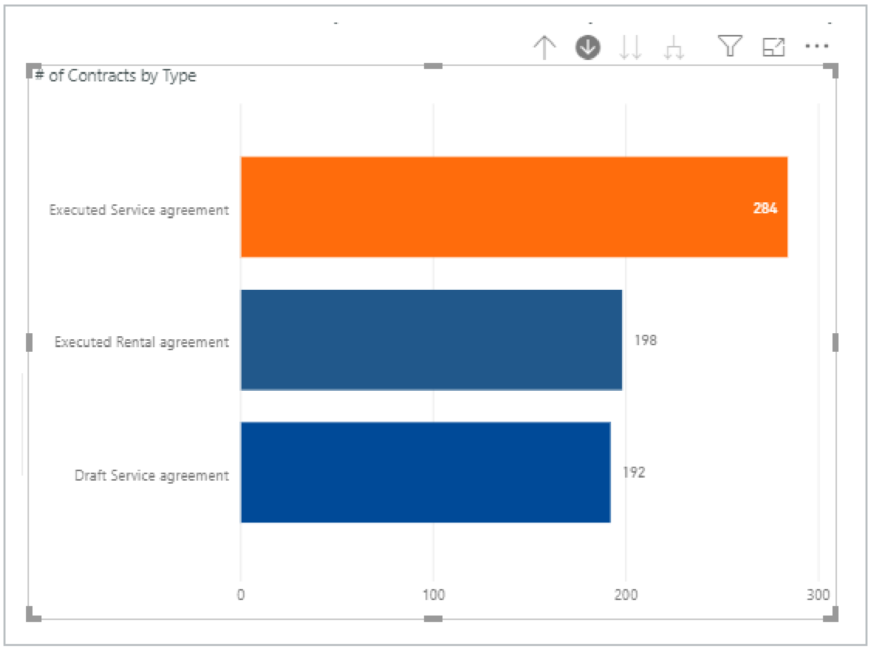
17. Click the **Drill down** icon.
18. Then click on the orange **Executed** row.
    - The chart changes to Executed Service Agreements and Executed Rental Agreements, both under 300



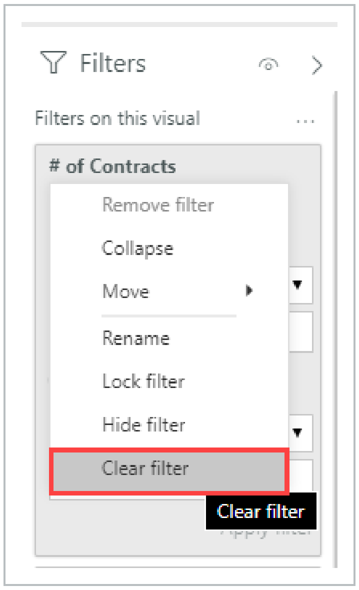
19. Click the **Expand All Down One Level in the Hierarchy** button.



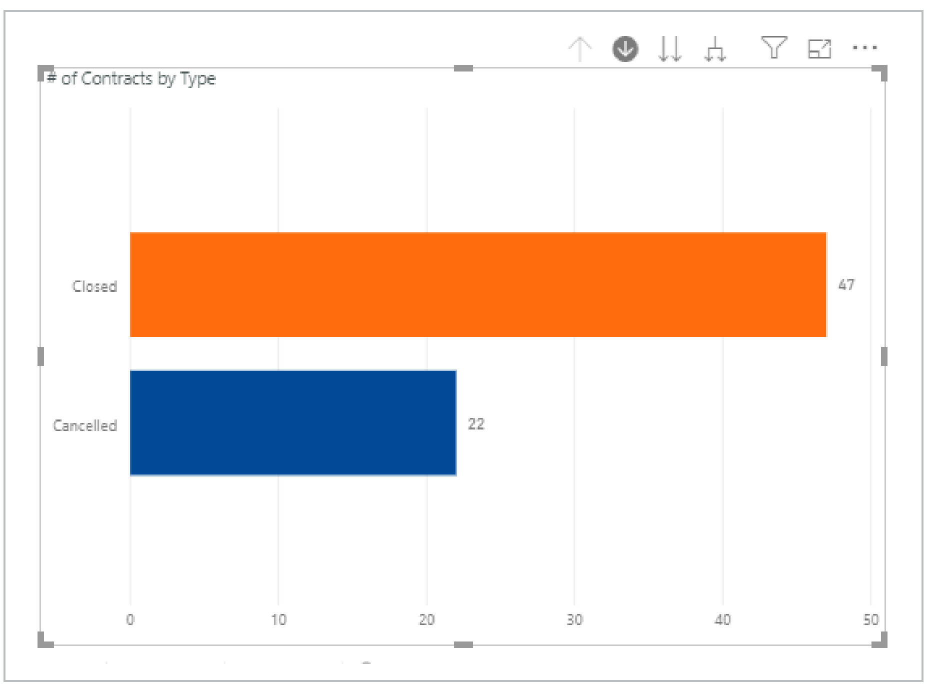
- Now the chart changes to all Executed Contract Types greater than 100 and less than 300



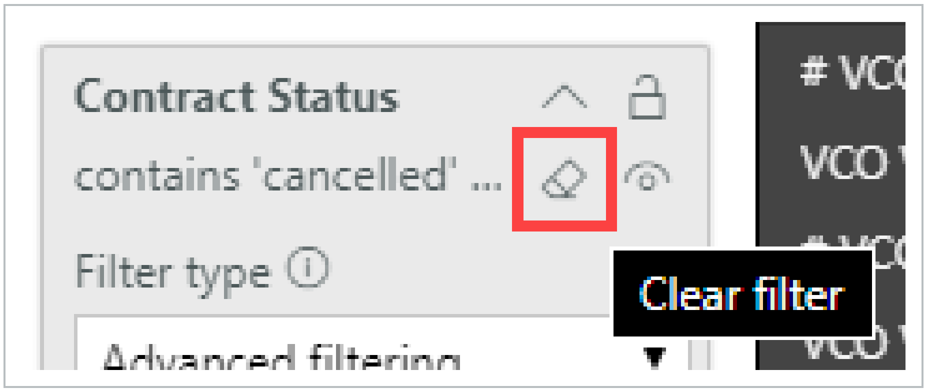
20. Right-click on the image and click **Drill up**.
21. Right-click on the # of Contracts Filter and select **Clear filter**.



22. Under the Contract Status filter, change the drop down from Basic Filtering to **Advanced filtering**.
23. Under Show Items when the value > contains type in **cancelled or contains closed**.
24. Click **Apply filter**.
    - The chart now shows only Cancelled or Closed statuses



25. Click the Contract Status **Clear filter** icon.

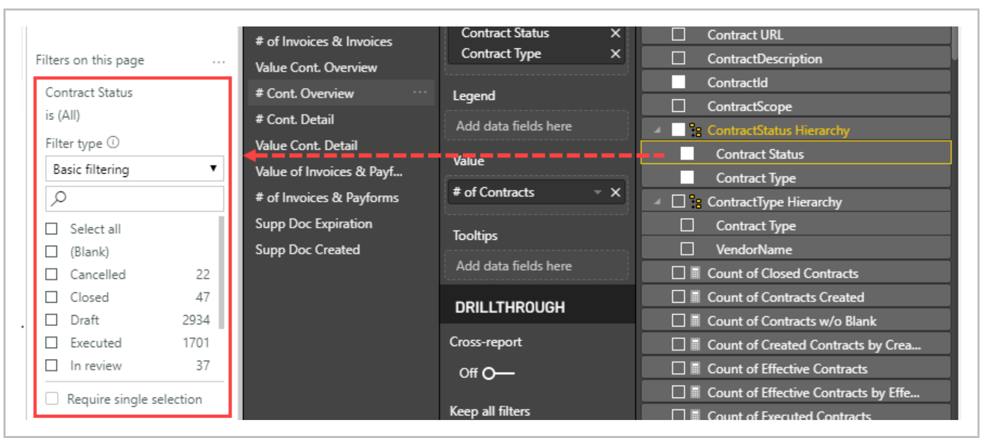


26. Click **File > Save**.

2.2.0.2 Page Filtering

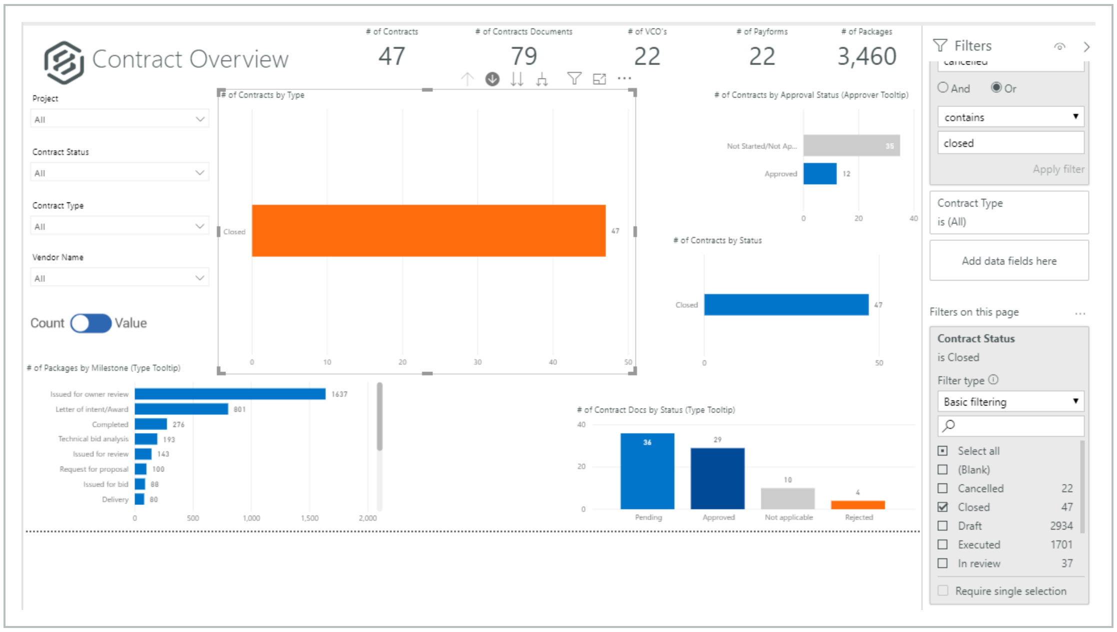
Two options of page filtering exist in Explore. The first is filtering on just this page (tab.)

From the Contract Fields panel, drag the checked **Contract Status** field onto **Filters on this Page**.



Select **Closed** from the Basic Filtering drop-down list.

- Now all reports on this page only show contracts that have been Closed

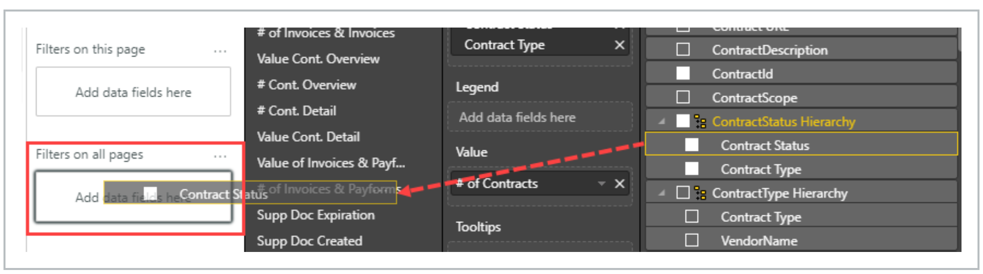


Select the **Remove Filter X** icon.

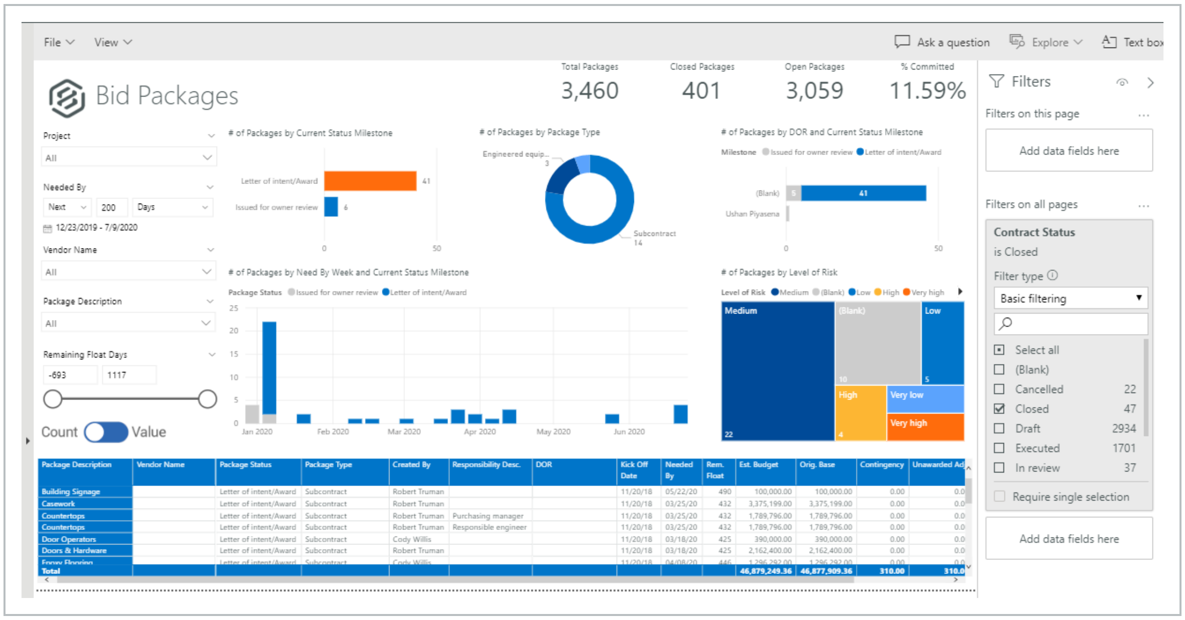
2.2.0.3 Filter On All Pages

The second type of page filter applies a filter across all pages (tabs).

Drag the same **Contract > Contract Status** data field onto Filters On All Pages.



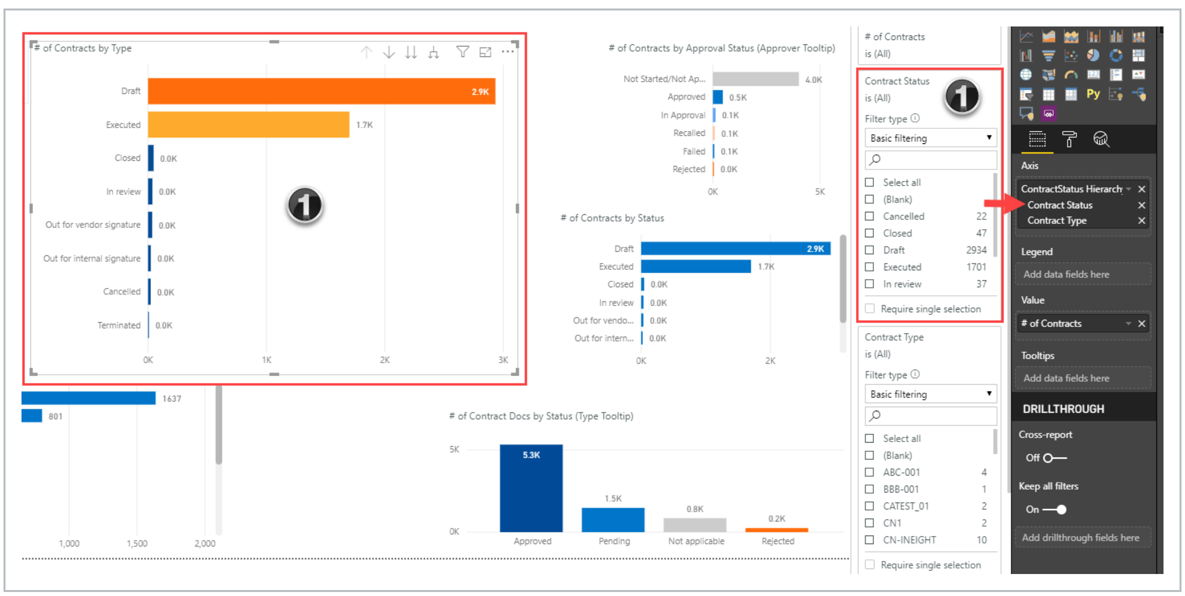
Again choose the option of **Closed** from the drop-down list. Nothing will look different on this tab, only when you select another tab will the change be obvious. For example, this is the Bid Packages tab, where all charts only represent Closed projects.



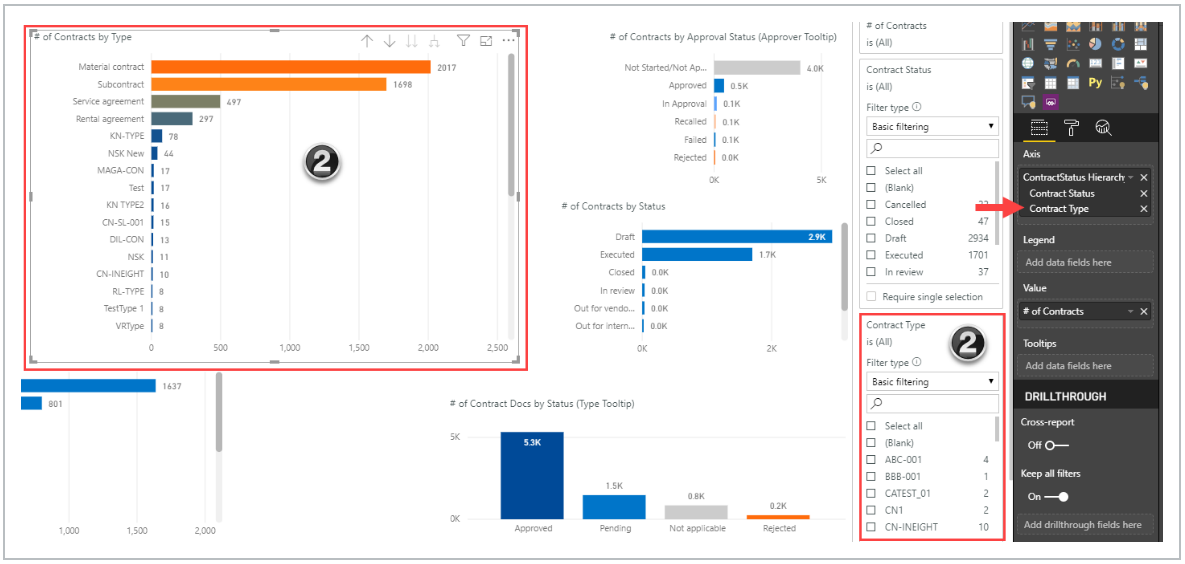
2.2.0.4 Go to the Next level in the Hierarchy

The final icon when filtering is the **Go to Next level in the Hierarchy** icon. When in a report and this icon is clicked, the table filters down to the next level in the Hierarchy as shown in this Visualization:

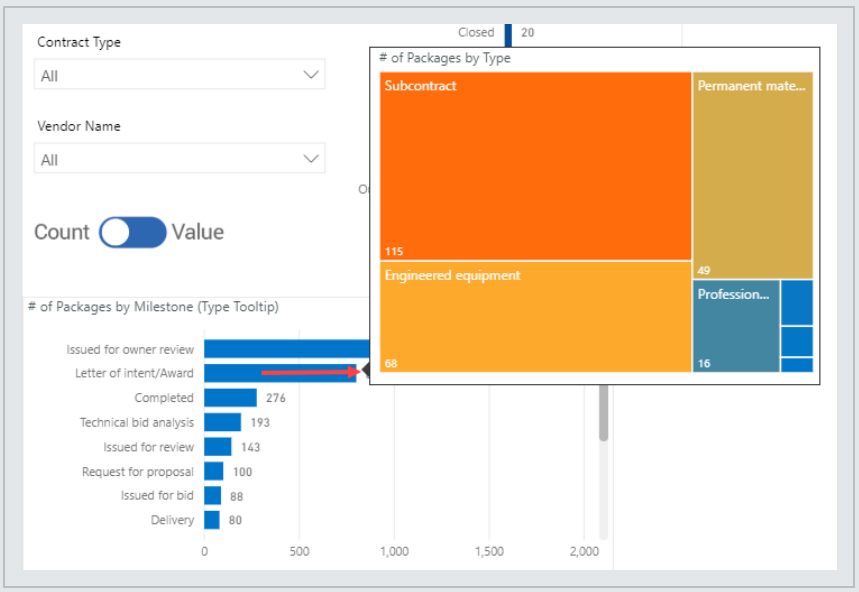
Initially, data will be represented by Contract Status.



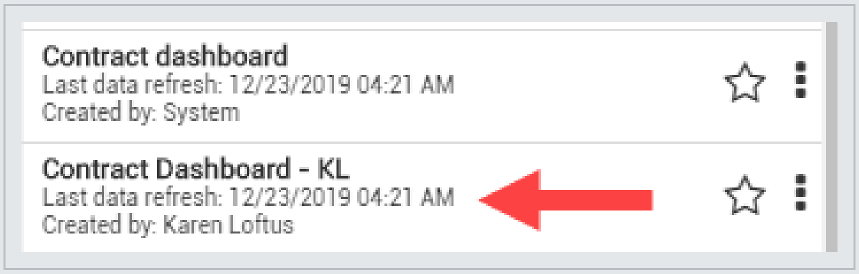
When the **Go to Next level in the Hierarchy** icon is selected, the chart will change to # of Contracts by Contract Type.



TIP Throughout the Explore dashboard, there are multiple instances where you can hover over a data-point to obtain a Type Tooltip pop-up showing drill down data.



NOTE **Last Data Refresh:** A time-stamp in the dashboard list indicates when the data in that dashboard was last refreshed. This helps minimize the confusion about why some records may or may not be present in your dashboard.



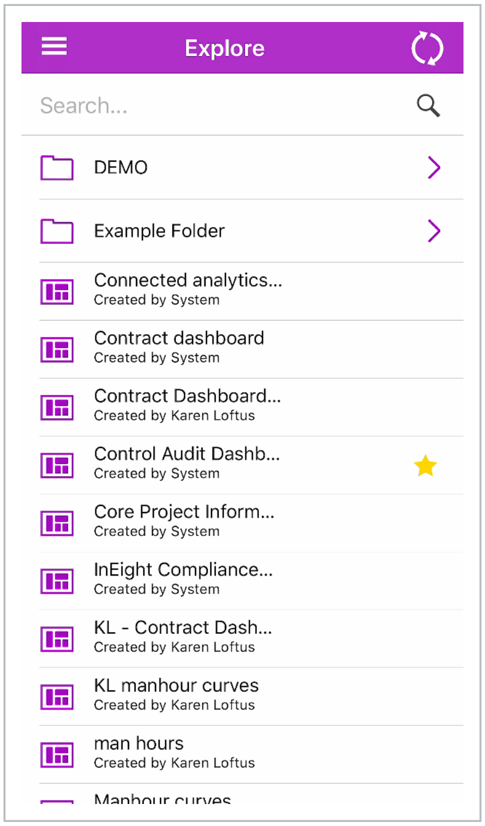
EXPLORE MOBILE

3.1 MOBILE APPLICATION

The Explore mobile application gives you access to your reports and the ability to view dashboards from a mobile device. This added convenience lets you analyze reporting data from anywhere, which allows you to make informed and timely decisions.

After you log in to the application, the screen opens to show an alphabetical listing of the dashboards.

- All folders and favorites added in the web application also show in Explore mobile.



The following step-by-step shows how to pull up the Explore mobile dashboard.

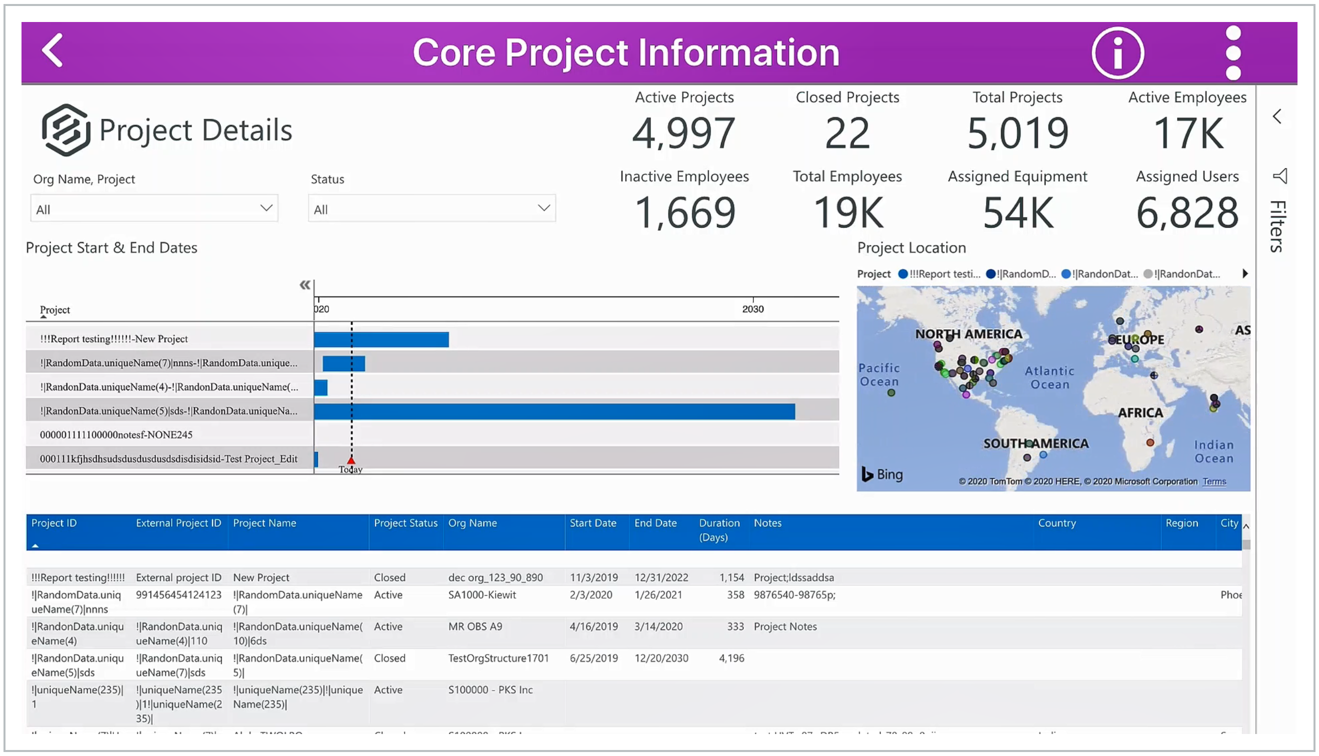
3.1 Step by Step 1 — Pull up a dashboard

1. Tap the **Refresh** icon to sync any changes you made in the web application.
2. Scroll through the list of dashboards and folders or use the Search function at the top to find the dashboard you need.

3. Tap a dashboard to open it.
    - The screen will turn from portrait to landscape.

3.1.1 Manipulate a dashboard

In the dashboard, you can refresh the screen, zoom in and out, select different tabs, and modify filters to personalize your view.



NOTE	You cannot share or edit dashboards in the mobile application.

- Tap the **Information** icon to show additional information about the dashboard, such as the owner of the dashboard and last data refresh time.
- Tap the **ellipses**, and then the **Favorite** icon to make the dashboard a favorite. This also makes the dashboard a favorite in the web application.
- Tap the **Menu** icon. You can toggle between the dashboard and your account information or sign out of the mobile application.

NOTE	The Sharing icons are visible but can only be activated in the web application.