Sandata BI User Guide

Sandata

August 24, 2021 v2.0
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Introduction

This document is a quick reference guide for users of Sandata's Business Intelligence (BI) tool. This guide is aimed all users regardless of their level of expertise with the tool, whether they are looking for assistance in navigating the BI tool on their own after training or they are looking for a refresher on how to perform specific tasks.

The topics covered in this document range from signing in for the first time and changing your password to move advanced tasks such as adding filters and setting up alerts.

For information regarding the cards included in the standard dashboard, please refer to the BI Card Catalog.

Accessing Sandata BI

Signing into Sandata BI for the first time

Once your credentials have been provisioned, you will receive a welcome email with the subject line: "**Congrats! You've been Domo'd!**". Please make sure to look for this email in your spam and junk folders as well as your inbox.

The welcome email will include the URL that you will need to use to access Sandata BI and a link to set up your password. We recommend that you bookmark the URL https://sandata.domo.com for easy access in the future. The list of supported browsers is included in the systems requirements page.

Upon your first login, you will be ready to review the dashboards that are available to you by hovering over the Menu (☰) icon and selecting one of the dashboards.

Signing into Sandata BI

Point your browser to https://sandata.domo.com. You will need to have credentials in order to access Sandata BI. The list of supported browsers is included in the systems requirements page.

Changing or resetting your password

If you need to reset your password, you can make this change on your own. Point your browser to https://sandata.domo.com and click on the link labeled "Forgot Password?" in the login page. If you are already logged in, you may change your password at any time by clicking your profile picture (last icon on the top right of the page) and then clicking the Settings (⚙) icon.

You will be prompted to enter your email address, which will be used to send you an email with a link to reset your password. Please look for this email in your spam and junk folders as well as your inbox. For step-by-step instructions on this process, click here.

Setting up your profile

Click on the profile button located on the top right corner of the page. Then, click on My Profile. Add as much information as you'd like, such as a profile picture. Entering your mobile number to you profile will add the option of receiving alerts and other communications via SMS messages.

For detailed information on the elements of the Profile page, click here.

Logging out

To end your session, click on your profile picture and then select Sign Out.

Requesting additional credentials for BI

Contact your Customer Success Manager (CSM). Please note that fees may apply.

Viewing cards, filtering and drilling-down

Viewing dashboards

Hover over the Menu ( ) icon to view the list of Dashboards (also known as pages) that you have access to. If the Menu icon is not visible, click on the Dashboards button at the top of the page.

Each user may have access to different dashboards depending on their security settings. By default, all users will have access to 3 pages: Overview, Favorites and Shared.

Make a selection from the list by clicking on the name of the dashboard you would like to access. If the dashboard has subpages, click on the > symbol to view all subpages and then make a selection.

From here, you may opt to view the dashboard as a whole, scrolling up and down to review the metrics on each card. Use the funnel at the top of the page to filter all the cards on the dashboard for a specific field or a date range, for example. The same can be accomplished by clicking on any of the bars (or any data element) for one of the charts, as this will filter the rest of the cards by the data point and value selected, provided that it is applicable.

You may also interact with individual cards by hovering over the card and clicking on the Expand Details ( ) icon.

To navigate to another dashboard, hover over the Menu ( ) icon and make another selection.

Viewing a card in Card Details (full screen) mode

From the Dashboard view, hover over the card and click on the Expand Details ( ) icon. The card you selected will open full screen. This full screen mode is also called Card Details view.

Hover over any part of the chart to highlight that section only, dimming the rest of the card. If the card includes a legend (for example, in pie chart cards), hovering over parts of the legend will have the same effect.

Toggle from chart ( ) to table ( )view to view the summary data supporting a visualization. Click on any column headers while on table view sort by the column selected.

For more information on the elements of this view, refer to the Card Details View Layout page.

Viewing details about the card

When available, the description of the card includes details on the purpose of the card, the criteria that was used to build the card and the drill-path of the card.

From the dashboard view, hover over the name of the card to view the card's description. The description of the card is also accessible from full screen mode by clicking on the name of the card.

For full details on each of the cards, please refer to our card catalog.

Filtering data

On Dashboard view and on full screen mode, use the Filter ( ) icon at the top to display the filters panel. Then, click on Add a Filter and select the data point by which you will be filtering the data. Then next step is to select which values will be used.

Cards may be set up with Quick Filters. The Quick Filters panel is located on the right side of the screen and includes several data points pertinent to the purpose of the card.

When using Filters or Quick Filters, you may navigate through the list of fields and values by scrolling up and down and clicking to make your selection; or you may use 🔍 to type in your selection. Notice that the list of options narrows to match the text you entered.

Exporting data

Select the Share ( ) button located at the top of the card and then click on Save/Export. Depending on the type of card, you will see some or all of these options: Excel, CSV, Email, Print and Slideshow. Select the option that best fits your needs.

If you selected Excel, CSV or Slideshow, the resulting file will be saved to the folder determined by your browser (typically C:\Downloads).

Please note that the export process may be lengthy depending on the volume of data you are attempting to export.

For additional information on how to export data, click here.

Drilling down into the data

First, you must be in Card Details (full screen) view. Next, click on any of the elements of the chart to drill-down to the next level of detail, if available. Every time you drill down, you are filtering the data by the selection you make. For example: on a bar chart where each of the bars represent a month of the year, clicking on March will only show me results for that month in the next view.

If the card is a gauge, click on either the highlighted or the grey part of the chart.

If the card is a bar chart, click on the bar that represents the month, customer, location or selection you would like to drill into. The same applies to pie, donut and funnel chart types.

The filters bar at the top of the chart will show you the selections you have made as you have drilled down. You may remove any of those filters by clicking on the x for that filter box. Removing all the filters will show you all the data available within the constraints of the main card. For example: the main card is set up to only show you the last 4 months, and then you drill-down to the next detail level by selecting a specific month. When you remove the filter for the month you selected from the main card, the detail level view will show you the last 4 months of data which is what the main card is set up for.

To go back to a previous level of the same card, use the breadcrumbs panel to select which view to return to. This will preserve the selections you made throughout the card's drill path.

To view more information on how to drill into the data, click here.

Favorite cards, alerts & scheduled reports

Setting up alerts

Alerts are useful to identify changes for a specific metric. When alerts are set up, BI will evaluate if the data meets the conditions of the alert every time the data is refreshed. Once the alert is triggered, you will receive an email with a snapshot of the card, the previous value, the new value and the difference. If you added your mobile number to your profile, you will also receive an SMS message on your mobile number once the alert is triggered.

To set up an alert, open the card in full screen (Card Details view) and then click on the Alerts (🔔) icon at the top of the card. The Alerts wizard will prompt you to enter the name of the alert, the metric you are tracking and the condition that must be met for the alert to be triggered. You will be able to customize the message that is sent to you and select any other members of your organization that you would like to share the alerts with. Please note that not all cards have metrics that can be tracked by alerts, for example, table charts.

Cards that have triggered alerts will show a shaking Alerts (bell) icon with a number in a yellow bubble.

Click on the alerts (🔔) icon at any time to view any alerts that have been set up for the card. Click on a specific alert to view its details, such as the alerts history showing how the data on this card has changed over time based on the criteria used for the alert.

To remove an alert, click into the alert to open the Alert Details. Then, click on the trash can icon.

To share an alert with others, click into the alert to open the Alert Details. Then, click on the share icon and search for each of the members of your organization you would like to share the alert with. Please note that you will only be able to share the alert with members of your organization who have credentials to access the BI tool.

Please make sure to add notifications@domo.com to the list of trusted senders. Otherwise, scheduled reports may be caught by spam filters or be sent to the junk folder of your mailbox.

For more detailed information on setting up alerts, refer to the Customizing Alerts page.

Using the report scheduler

Sandata's BI Tool includes a Report Scheduler feature to email individual cards on a periodic basis. The email will include a snapshot of the card and a link to the card.

To schedule a card as a report, open the card in full screen mode. Make adjustments to the date ranges and filters as desired. Then, click on the Card Options ( ) icon and select Schedule Report. You will be prompted to select when and how often you would like to receive the scheduled report, on what day(s) of the week, as well as the time. Then, add any other individuals who will be the recipients of the scheduled report. Please note that unlike alerts, you will be able to add other members of your organization who do not have credentials for BI. The last step is to click on Schedule.

Please make sure to add notifications@domo.com to the list of trusted senders. Otherwise, scheduled reports may be caught by spam filters or be sent to the junk folder of your mailbox.

Refer to the Scheduling Reports page for more a more detailed explanation on how to schedule reports.

Marking a card as a favorite

Create a curated view of the cards you use the most by marking those cards as a Favorite. The cards you select as your favorites will be available on the Favorites dashboard.

To mark a card as a favorite, you must be in Cards Detail (full screen) view of the card you want in your Favorites page. Then, click on Card Options ( ) icon at the top of the card and select Add to Favorites.

For detailed instructions on how to add a card as a favorite, click here.

Viewing my favorite cards

Hover over the Menu ( ) icon to view the list of Dashboards (also known as pages) that you have access to. If the Menu icon Is not visible, click on the Dashboards button at the top of the page. Select Favorites from the list. All cards that you have marked as a favorite will be shown on this page.