

**Description:** A guide to creating links between dashboards in KPIWorX.

**General Requirements:** Familiarity with KPIWorX.

## Introduction

A powerful feature of KPIWorX is the ability to create links between dashboards. The user can select an item in a chart and jump to a new dashboard that may give them more detail about the data point they selected.

When following dashboard links, global filters are maintained.

Every KPIWorX dashboard has a link name that can be used in the Load KPI Dashboard global command (from clients that support commanding like GraphWorX64 and AssetWorX) or directly in KPIWorX. This link name is a combination of the visibility scope and the dashboard file name.

This document will walk you through finding the link name and creating links between two dashboards.

## Getting the Link Name

1. Open **KPIWorX**.
2. Go to **Home > Open** and choose your destination dashboard.
3. Select the **more options**  icon in the top right corner of KPIWorX
4. Select **Share > Dashboard Name > Clipboard**. The target dashboard name should now be on your clipboard. (You can also choose **Email** to email the name to yourself.)

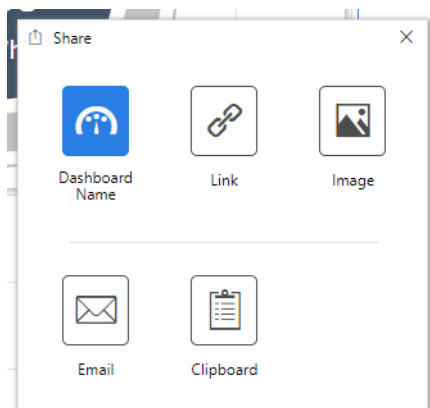


Figure 1 – Getting the dashboard name

## Creating a Symbol Link

1. Go to **Home > New**.
2. Open to the **Component Library**.
3. Drag a **KPI Gauge 1** widget from the **General** category onto your dashboard.
4. Drag a simulator datapoint from the **Tag Browser** onto the gauge.
5. Go to **Widget Settings**.
6. Paste your dashboard link name into the **Target** field.

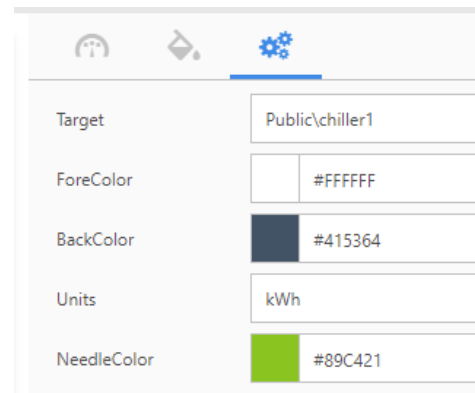


Figure 2 – Widget target property

7. Save your dashboard.
8. Go into **presentation mode**.
9. Click or tap your gauge. You should be taken to your destination dashboard.

## Creating a Chart Filter Link

With charts, you can also create a dashboard link, but selecting a chart element will apply a filter for the selected element at the same time that it loads the new dashboard.

**Note:** This example requires the sample AnalytiX-BI configuration to be active.

1. Open **KPIWorX**.
2. Create a new dashboard.
3. Open the **Tag Browser**
4. Browse to **My Computer > AnalytiX > BI Server > Data Models > Northwind**.
5. Drag **Orders** into a cell, creating a table widget.
6. Save this dashboard, and name it **Orders**.
7. Select **more options > Share > Dashboard Name > Clipboard**.
8. Create a new dashboard.

9. From the **Component Library**, drag a **categorical chart** into a cell.
10. In the **Tag Browser**, expand **Customers** and drag **CompanyName** onto the chart widget.
11. Expand **Orders > OrderID** and drag **Count** onto the chart widget.
12. Go to the **Widget Setting** panel
13. Enable **Top N items**.
14. Turn **Labels** on.
15. In the **Behavior** section, choose the **link** icon and paste your dashboard link name into the **Target** field.

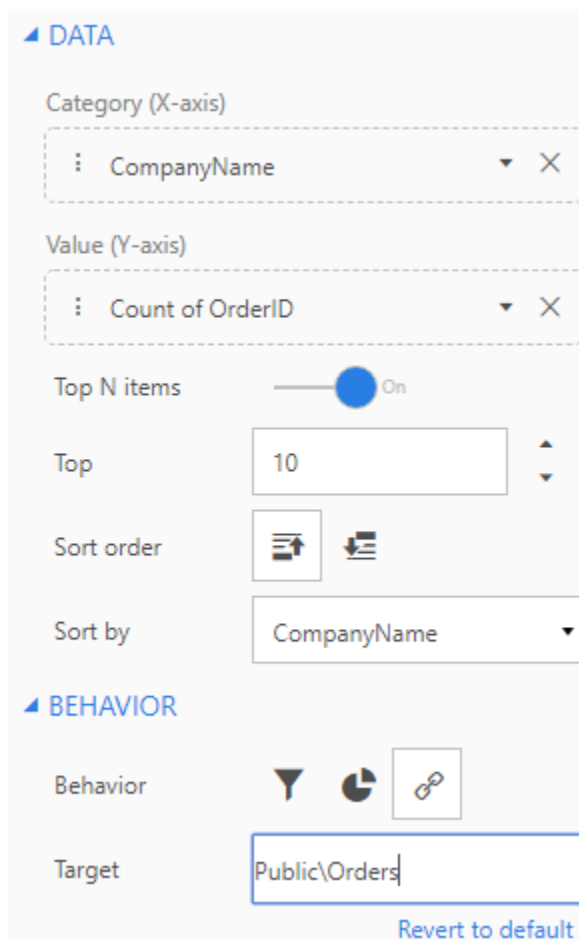


Figure 3 – Chart widget settings

16. Save your dashboard as **BarChart**.
17. Go into **presentation mode**.
18. Select a bar on the chart. You will be taken to your Orders dashboard, and it will be filtered to show only the orders

for the company name you selected. You can see the active filter in the filters panel.

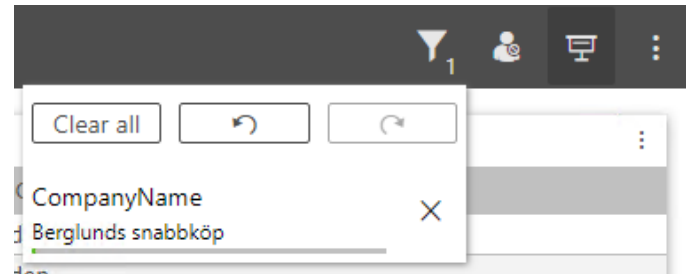


Figure 4 - Applied filter after loading linked dashboard

19. You can go back to your BarChart dashboard and select another bar to observe that the Orders dashboard will show different orders.

A table widget can be configured with a target as well, but you have to choose a **NavigationColumn**. The column selected here defines the filter that will be applied when the new dashboard is loaded.

For instance, if **NavigationColumn** is set to **CustomerID** and the user selects a row with a **CustomerID** of **QUICK** then the new dashboard will be loaded with a filter restricting the CustomerID to QUICK.

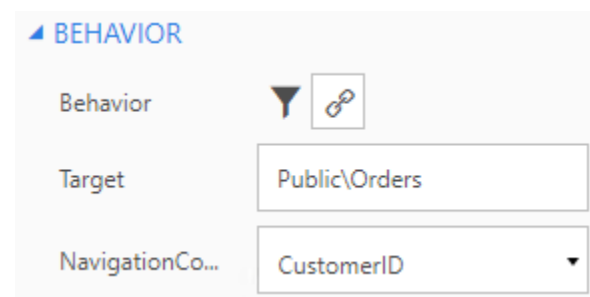


Figure 5 - Behavior settings for table widget