

# - InfoCentre -

FOR RISKMAN VERSION 2203

Last reviewed March 2022

## CONTENTS

Introduction .....	2
The first time you use the InfoCentre.....	3
Take the Quick Tour.....	3
Go to the InfoCentre .....	4
Default Widget Setup .....	4
Working with Widget Groups .....	6
To Create a New Widget Group: .....	6
To Edit Existing Widget Groups: .....	7
Adding a Widget.....	8
Widget Types .....	9
Charts .....	9
Basic Count (Gauge).....	9
Single Series Chart .....	9
Multiple Series Chart.....	9
Pie Chart.....	9
What can you do with your Widgets? .....	10
Widget Actions .....	10
Widget Properties .....	13
Widget Property Menus.....	15
Broadcast / Watch.....	17

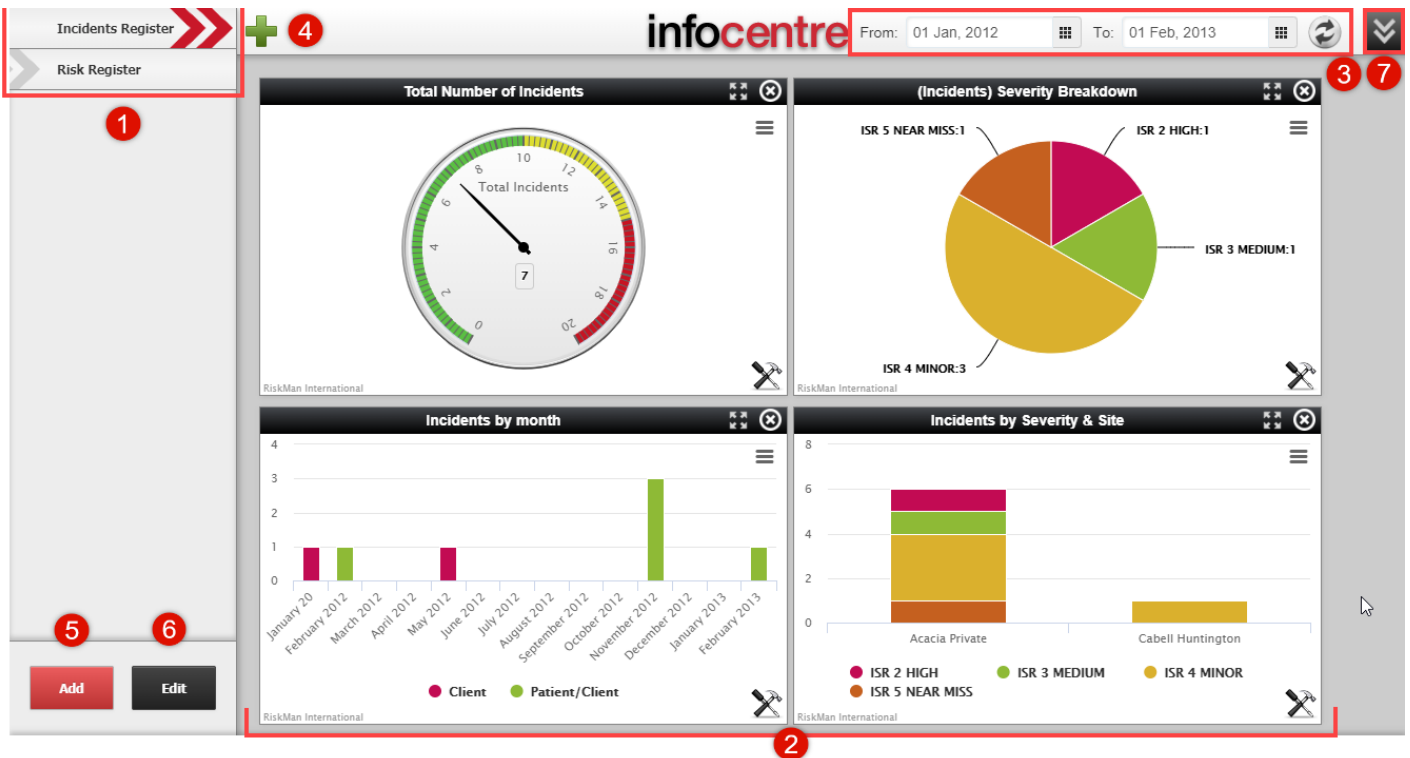
## INTRODUCTION

The **InfoCentre** is an interactive dashboard that provides all levels of users with simple, real-time information from their domain.

This information is presented in **Widgets**, which range from various chart types; to grids of information; and more. These Widgets can be easily arranged and modified depending on a user's preference.

**Widgets** are kept together in **Groups**, much like the concept of Indicators being grouped into Indicator Sets.

Below is an example of the **InfoCentre** homepage and its functionality:



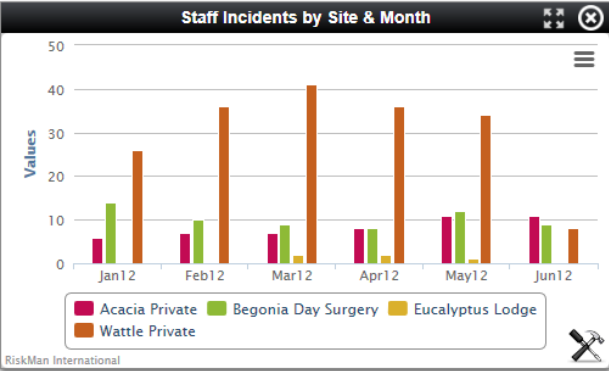
- 1 Widget **Groups** (click on each group name to view the Widgets contained in the group)
- 2 Individual **Widgets** contained in the current **Group**
- 3 **InfoCentre Date Range**: The date range to apply to Widgets which have been configured to do so (other Widgets may have a hard-coded date range, or no date restrictions at all)
- 4 Add a new **Widget** to the current **Group**; create or edit a **Datasource** if the user has permission to do so
- 5 Add a new **Widget Group**
- 6 Edit current **Widget Group** properties (Group name; position in list)
- 7 You can hide and show the toolbar by clicking on the Hide/Show button

## THE FIRST TIME YOU USE THE INFOCENTRE

The InfoCentre can be accessed by either navigating to **Analysis > InfoCentre**. The first time you open the InfoCentre, RiskMan will offer to either take you on a **tour** of its features, or to skip the tour and go straight to the InfoCentre. We recommend taking the tour to help familiarise yourself with the functionality.

### WELCOME TO THE INFO CENTRE

The Info Centre is your central point for getting a clear snapshot of the RiskMan data that matters to you. Your Info Centre displays information using "Widgets". A widget can be configured to look up certain data in your system, such as the number of falls in a given date range. You can then opt to display that data in a graphical format, for example by charting the falls by type, per month, as shown here:



There are some 'standard' widgets available for each Register in your system; you'll have the option to add these to your Info Centre in a moment. You can also create new widgets to suit your requirements.

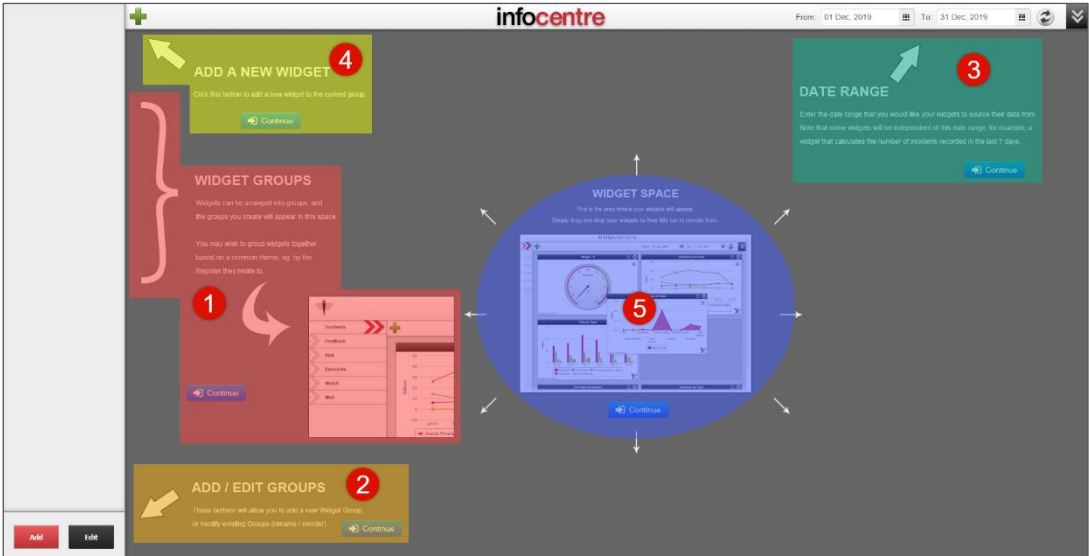
Would you like a quick tour of the functionality on this screen? Or would you rather start working with the Info Centre right now?

➔ Take the quick tour
➔ Go to the Info Centre

## Take the Quick Tour

If you take the tour, it will take you through a series of images showing you each of the controls and areas located around the InfoCentre page. After completing the tour, RiskMan will install default Widgets based on what's been setup for your organisation. Once this is complete, you are ready to start using the InfoCentre.

- 1 Widget Groups
- 2 Add/Edit Group
- 3 Date Range
- 4 Add a new Widget
- 5 Widget space



## Go to the InfoCentre

If you choose to go to the InfoCentre you will be taken to the **Default Widget Setup**. RiskMan will **1** install the Widgets for each of available Registers. If you choose to install the Default Widgets **2** the Default Widget Setup message will disappear and the two Widgets Groups will load in the Widget Groups menu.

### DEFAULT WIDGET SETUP

We will be installing widgets for the following Registers:

**1** Incidents, Incidents\_Posted

RiskMan will install a set of default Widgets for each Register listed above as a starting point for you. After the Widgets have been installed you will then be able to modify each to your liking, or even remove Widgets you don't want.

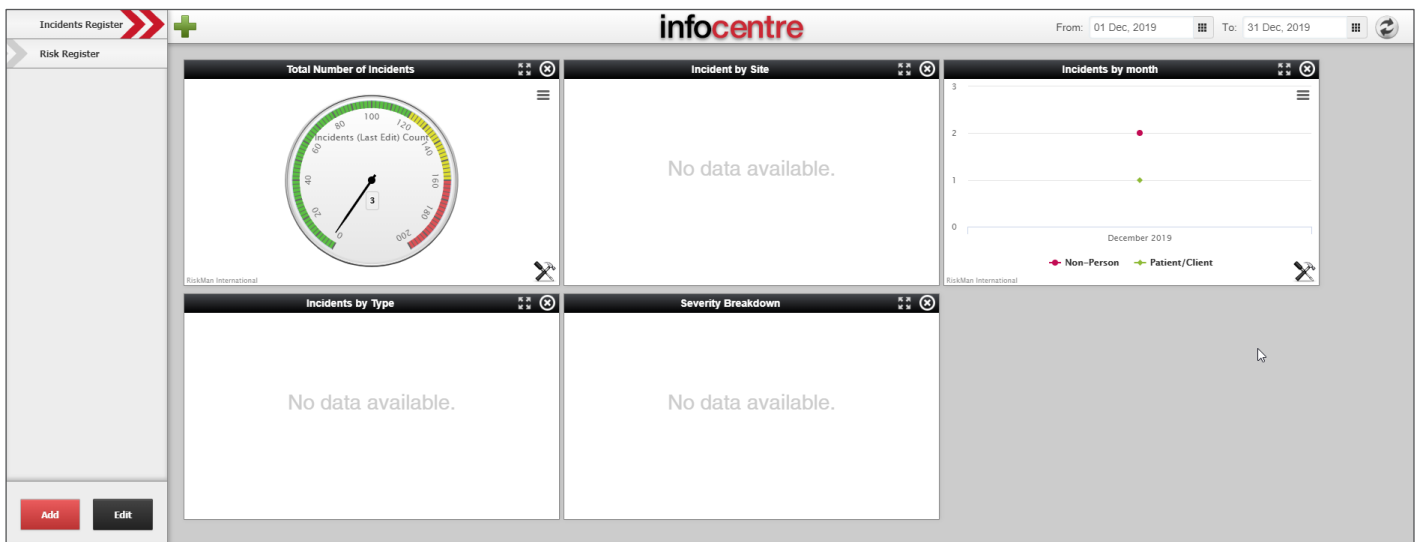
Alternatively, you can opt to not install these default Widgets, and instead start working on creating Groups and Widgets of your own.

**2** [Install Default Widgets](#)
**3** [Continue without installing](#)

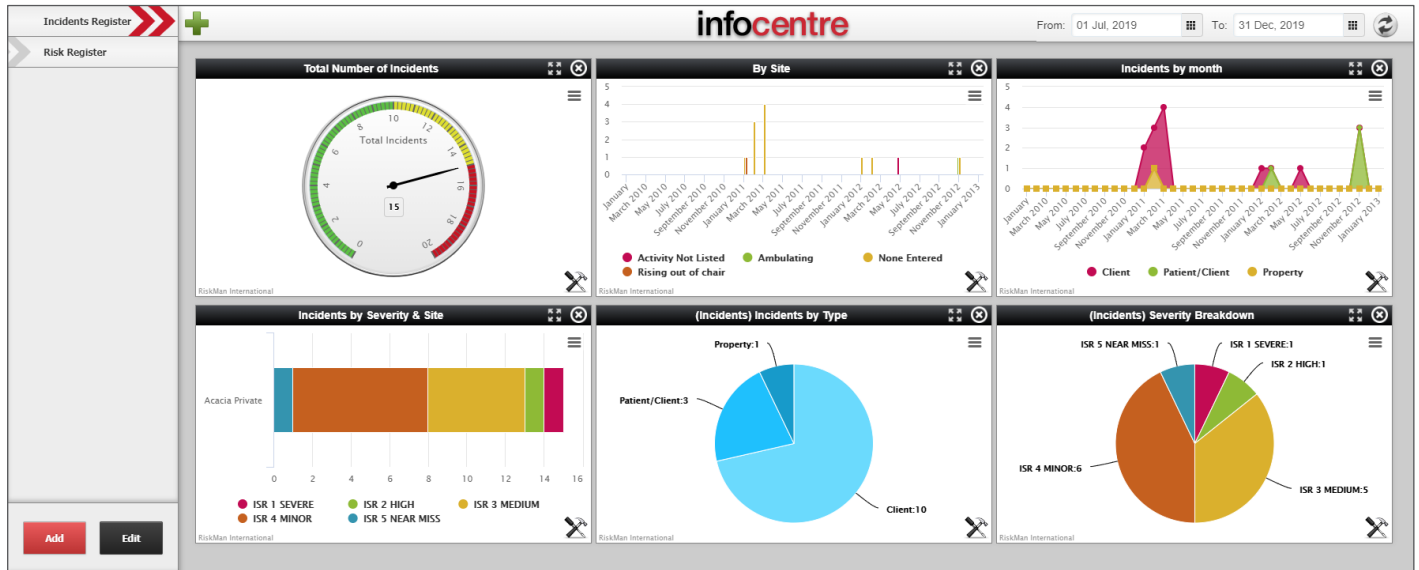
## Default Widget Setup

Several default Widgets will also be installed in each of these Groups. Once this is complete, you are ready to start using the InfoCentre.

In the image below you can see the installed Widgets. Notice there are Widgets displaying data that appears to be limited and there are also Widgets that display the message “No data available”. This is due to the date range that has been loaded at the default screen. The Date range automatically defaults to the previous months data. You can change the date range to broaden the scope of the data that is displayed.

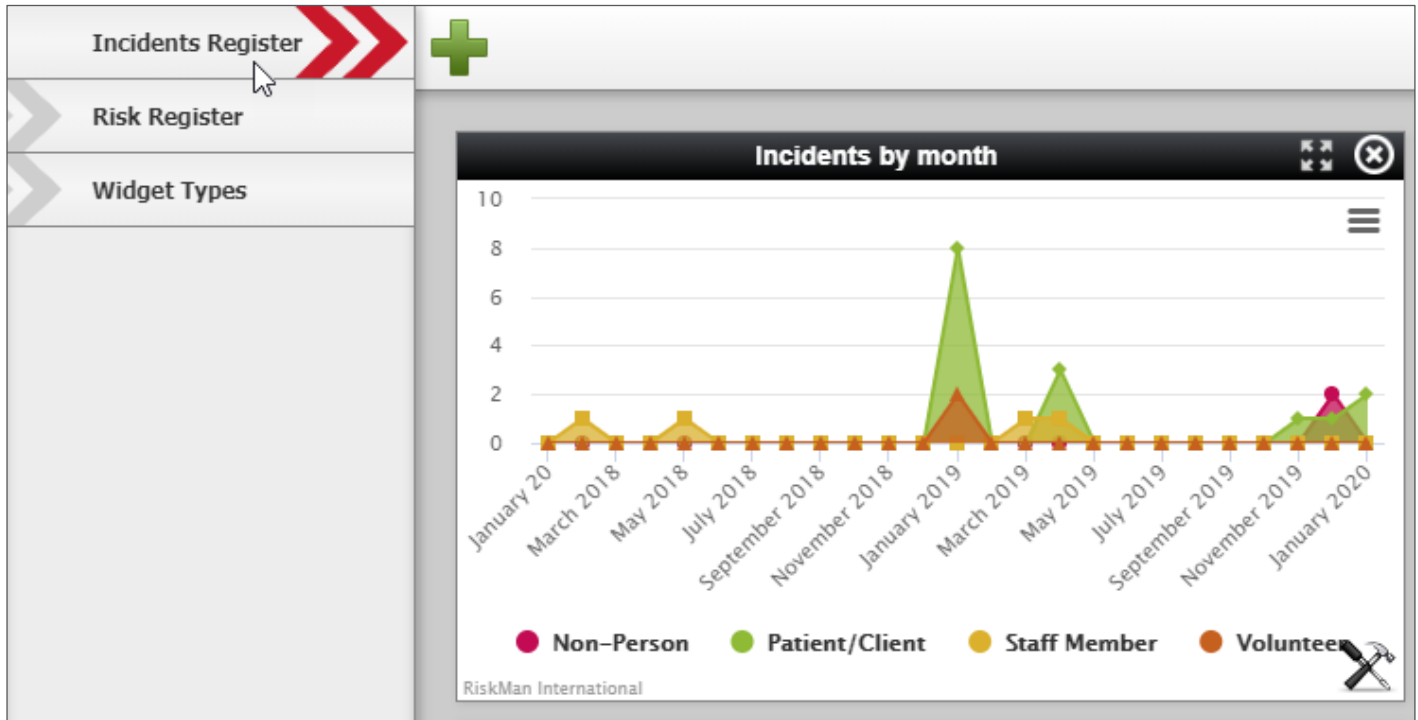


By changing the date range, the displayed data gives us more information.



## WORKING WITH WIDGET GROUPS

Widgets are contained within logical groupings of your choice. For example, you may wish to group your Widgets by register or by location. To view Widgets within each group simply click on the group name.



### To Create a New Widget Group:

- 1 Click on the **Add** button below the group names
- 2 Create a **Name** and a **Friendly Name** for your group. The **Name** is what is stored in the database whilst the **Friendly Name** is what will appear on the **InfoCentre** page as the Group name. This allows you to have two groups with the same name, without causing a database error
- 3 Click **Create**


You can then start adding Widgets to your new Group.

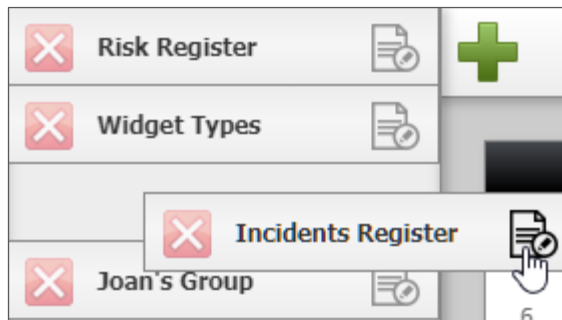
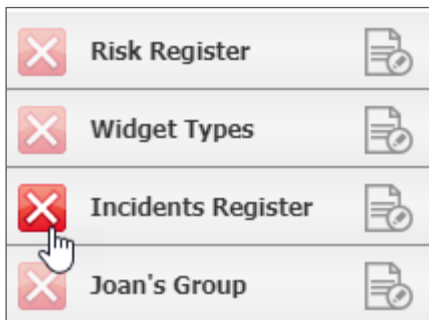



## To Edit Existing Widget Groups:

1 Click the Edit button. From there you can:

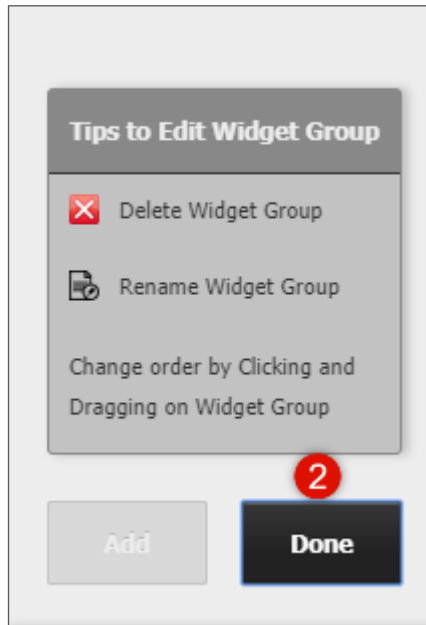
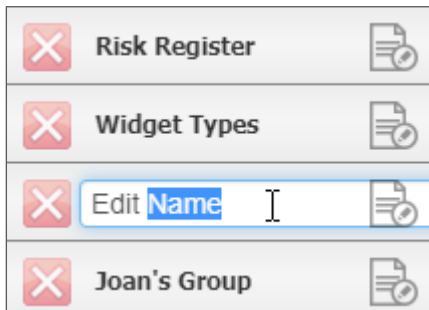


- Click the  icon to delete the Group
- Click and drag a Group to re-order (Note: the first group in your list will be the one that loads whenever you go to the InfoCentre)



- Click the  icon to edit the Group name

2 Click **Done** when you have finished modifying your Groups.





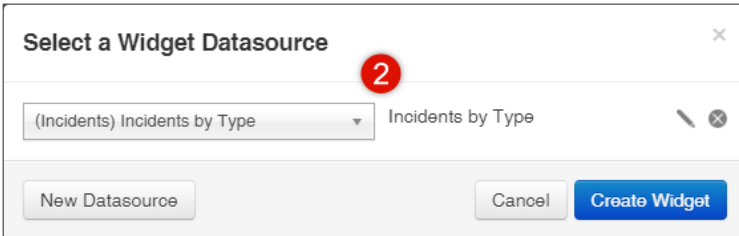
## Adding a Widget

You can add a Widget to a group from an existing Datasource by doing the following:

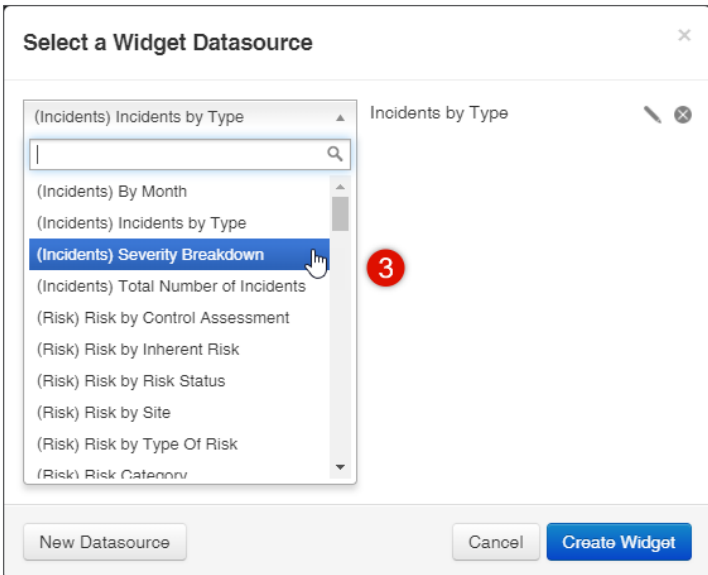
- 1 Click on the **green cross** button in the InfoCentre toolbar to open the Select a **Widget** Datasource window



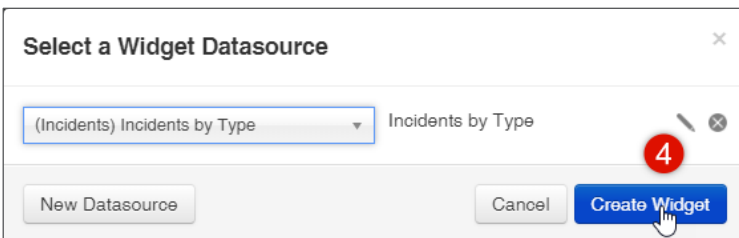
- 2 Use the dropdown list to select the existing Datasource



- 3 Your Datasource list will contain a set of default Datasources as well as any Datasources that have been created since your system was implemented



- 4 Once you have selected a Datasource click on the **Create Widget** button



A Widget based on the Datasource you chose will appear in the active Widget Group.

## WIDGET TYPES

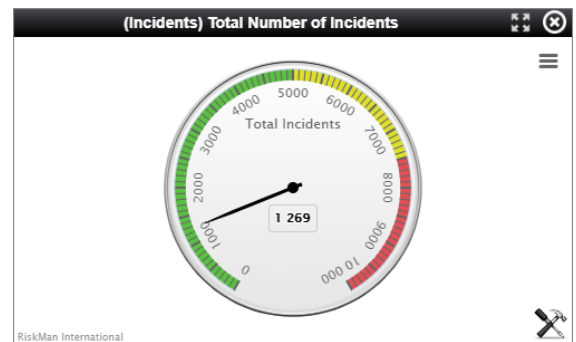
You are able to choose from several types of Widgets depending on the data you want to display.

### Charts

There are a number of different of charts types that you have available to use when building your Datasources.

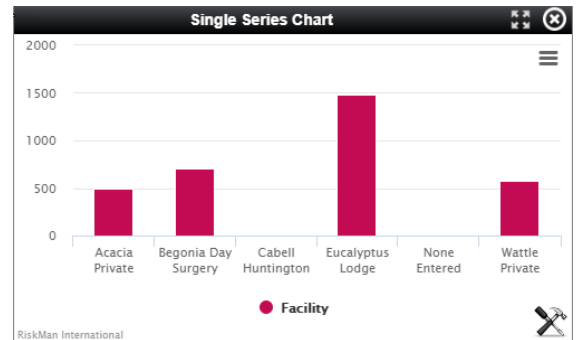
#### Basic Count (Gauge)

The Gauge chart displays a basic count of a single dataset. This type of chart is useful for displaying the total number of records based on the Source of Data and the filters you apply. For example, the Gauge on the right is displaying the total number of incidents recorded in the system.



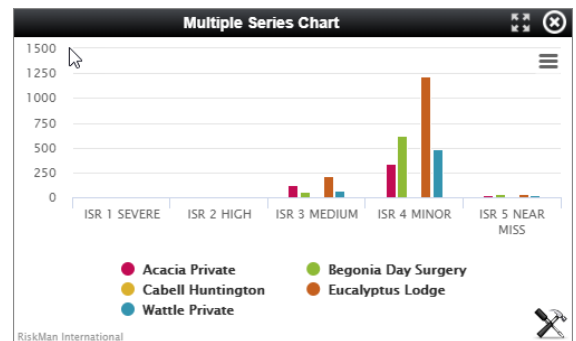
#### Single Series Chart

The Single Series chart displays as a vertical or horizontal Bar or a Line chart either with or without data points. This type of chart is useful for displaying a number of records with multiple categories. For example, the chart on the right is displaying the total number of incidents by site/location.



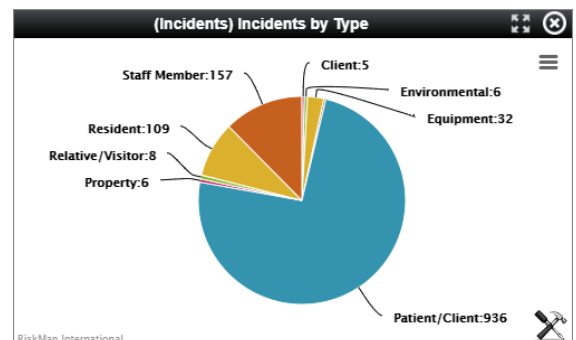
#### Multiple Series Chart

The Multiple Series chart displays as a vertical or horizontal Bar or a line chart either with or without data points. This type of chart is useful for displaying a number of records with multiple categories displayed in groups. For example, the chart on the right is displaying the total incidents by site/location grouped by Severity rating.



#### Pie Chart



The Pie chart displays a segmented chart of a single set of data. This type of chart is useful for displaying the number of records compared across categories on the Source of Data and the filters you apply. For example, the chart on the right is displaying the total number of incidents recorded in the system by incident type.




## WHAT CAN YOU DO WITH YOUR WIDGETS?

Once a Widget has been added to an InfoCentre Group you have several options available to control the way the Widgets display the Datasource.

### Widget Actions

Action	Description	Screenshot
<b>MOVE</b>	<p>To move a Widget to another place within the group - Click and drag the <b>Widget Header</b> at the top of the Widget and move it to a new position.</p> <p>When you grab and move a Widget to a new position by dropping it on top of another Widget the Widget that occupied that position will swap places with the moved one.</p> <p>Widgets cannot be moved between each group.</p>	
<b>EXPAND</b>	<p>To expand the size of a Widget so that takes up the whole of the InfoCentre stage - Click the <b>Expand</b> button  in the Widget Header of a Widget.</p> <p>To contract the Widget back to its default size, click the  button or in the grey area outside of the Widget's border.</p>	
<b>PRINT / EXPORT</b>	<p>Print the selected Widget, or exports it to a variety of file formats.</p> <p><i>Note: the look of the printed or exported Widget will take on the expanded view look.</i></p>	

**DELETE**

To delete a Widget - Click the  icon on the right side of the Widget Header.

This will delete the Widget but not the Datasource. You can re-add a Widget from the Datasource at any time.



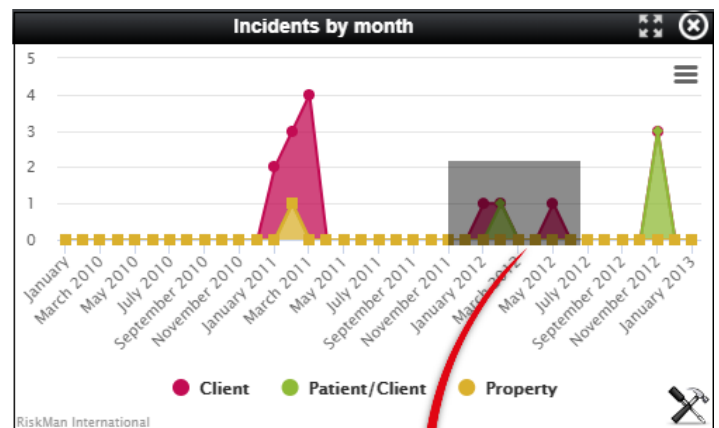
**ZOOM**

The Zoom function allows you to zoom in on **Bar/Column** and **Line charts**.

To zoom, click and drag a rectangle over the chart area that you wish to focus on and release the mouse button.

To zoom out, click the **Reset zoom** button in upper right of the Widget window.

You can only zoom-in on Bar, Column, Line, and Area charts. You cannot zoom in on Pie charts, Gauges, Frames, or Grids.



**INTERACT**

**Series Charts**

If a chart displays a legend, you can click on a value to remove it from display.

When you click on a value in the legend of a Widget it will grey out the heading and the data will be removed from the chart making it easier to see the remaining data.

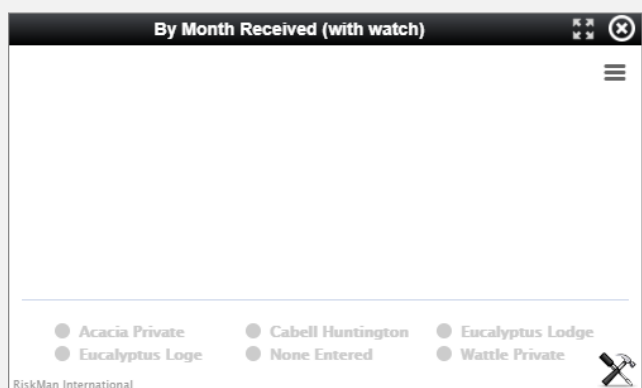
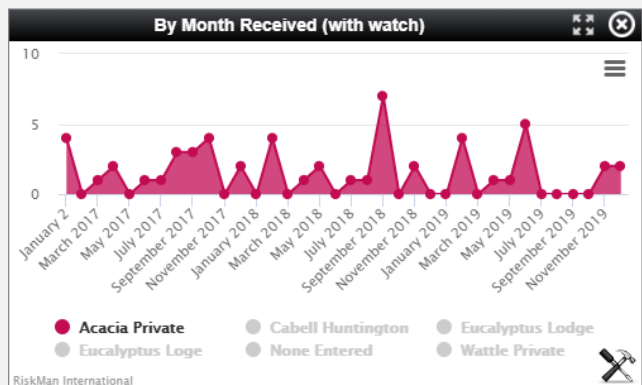
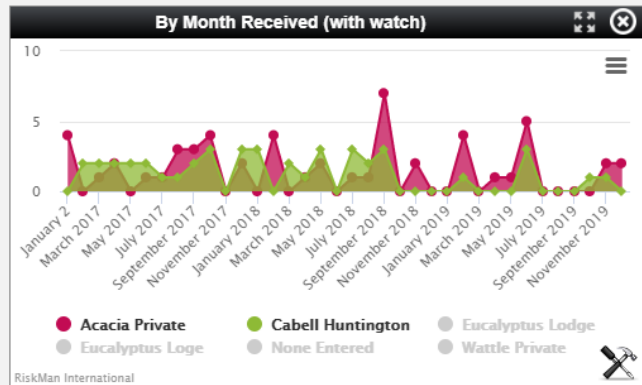
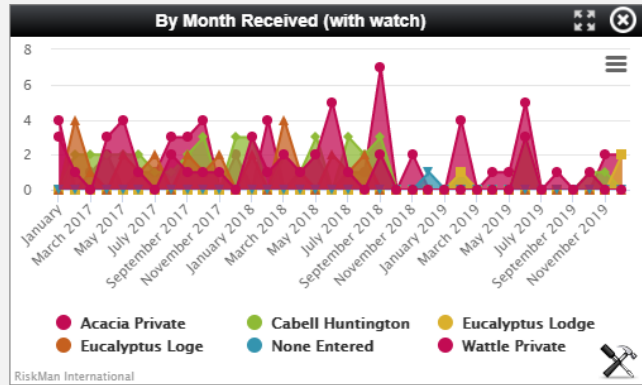
If you turn off all the value headings the chart will be blank.

This also applies when you are in expanded mode.


**Pie Charts**

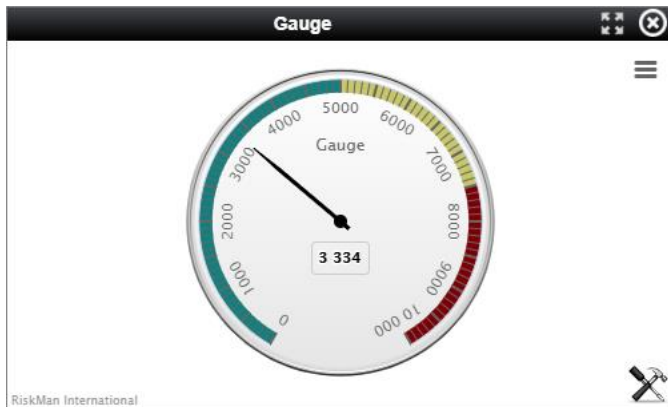
To interact with Pie charts, you can select the value by clicking on the group heading or the pie segment that represents the group. When you click on a segment it will move slightly away from the rest of the segments.

You can deselect the series by clicking on the series heading or segment a second time.



## Widget Properties

Each Widget has a set of properties that allow you to configure the way the data is displayed. To access the Widget Properties, Click the Properties icon . The Widget will flip over displaying the Properties. All Widgets: Change the Widget Title. On the Watch tab, you can set the Widget to auto-refresh (5 minute intervals). Pie Chart: No further properties. Gauge: Adjust the colours and their positions on the gauge (much like indicators). Single Series or Multi Series Chart: Change the chart type.



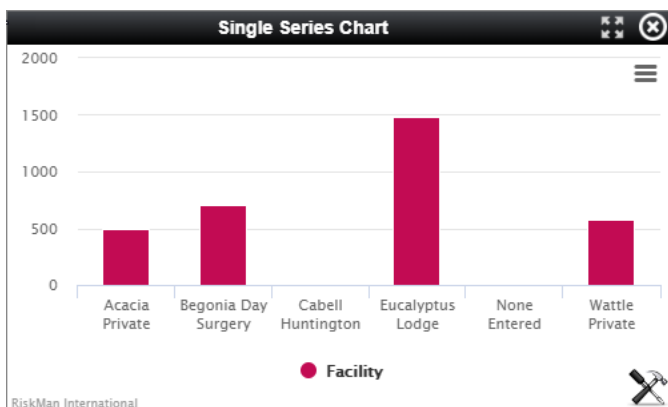
### Gauge Properties

The Gauge has three tabs under the properties menu:

**Basic:** View the original Datasource name and change the Title name

**Watch:** View the Watch settings

**Custom:** Change the Caption, number stops, and colours used in the display



### Single Series Properties

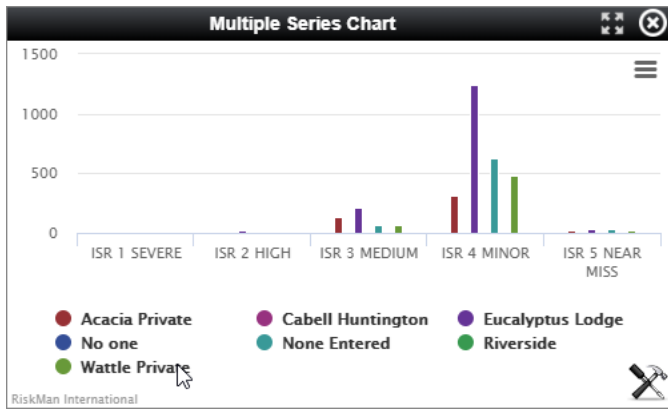
The Single Series Chart has three tabs under the properties menu:

**Basic:** View the original Datasource name, change the Title name, and select the type of chart

**Watch:** View the Broadcast and Watch settings

**3D:** Change the chart to a 3D style view

*Note: Zoom function does not work for 3D charts*



### Multiple Series Properties

The Multiple Series Chart has Four tabs under the properties menu:

**Basic:** View the original Datasource name, change the Title name, and select the type of chart

**Watch:** View the Broadcast and Watch settings

**Custom:** Apply stacking to the chart

**3D:** Change the chart to a 3D style view

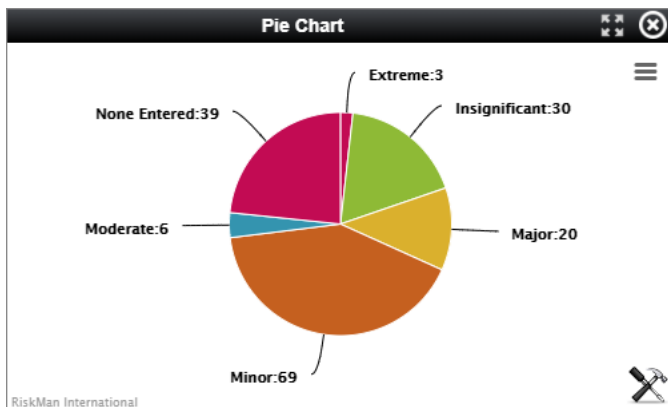
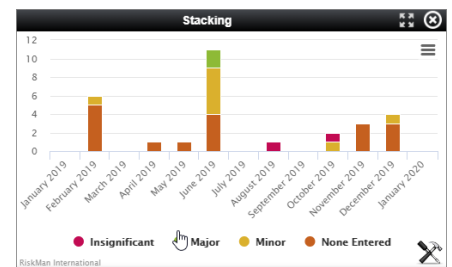
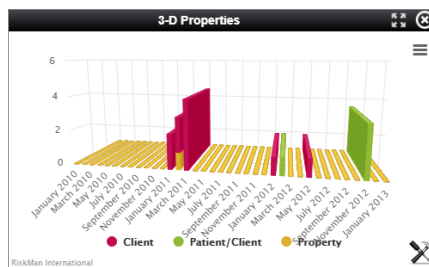
*Note: Zoom function does not work for 3D charts*

**Multiple Series Chart's Properties**  
 Basic | Watch | Custom | 3D  
 Data Source: Multiple Series Test 2 Advanced  
 Title: Multiple Series Chart  
 Type: Chart - Column  
 SAVE CANCEL

**Multiple Series Chart's Properties**  
 Basic | Watch | Custom | 3D  
 Broadcast: @@Site x @@Outcome x  
 Watch: @@IncidentInvolved x @@Incident\_Location x  
 SAVE CANCEL

**Multiple Series Chart's Properties**  
 Basic | Watch | Custom | 3D  
 Stacking: Off (dropdown menu)  
 SAVE CANCEL

**Multiple Series Chart's Properties**  
 Basic | Watch | Custom | 3D  
 Depth: 50  
 Angles X/Y/Z: 10 10 10  
 Margin T/R/B/l: 20 20 100 20  
 SAVE CANCEL



### Pie Chart Properties

The Gauge has three tabs under the properties menu:  
**Basic:** View the original Datasource name and change the Title name

**Watch:** View the Broadcast and Watch settings

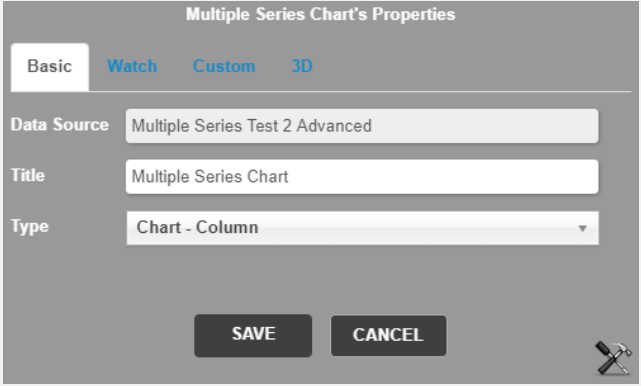
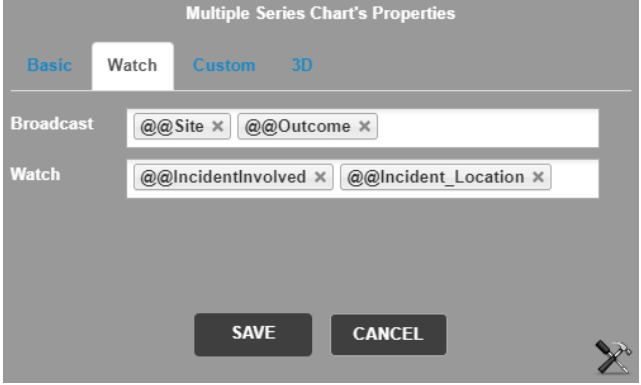
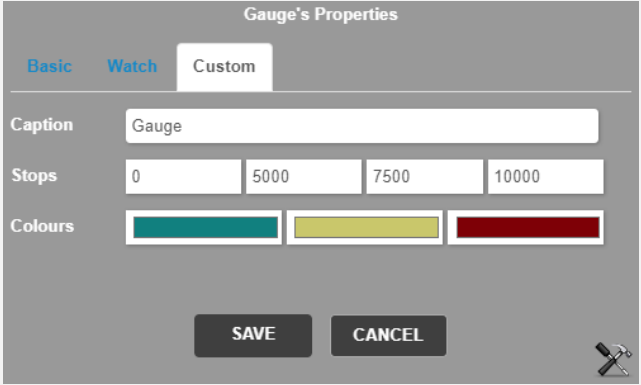
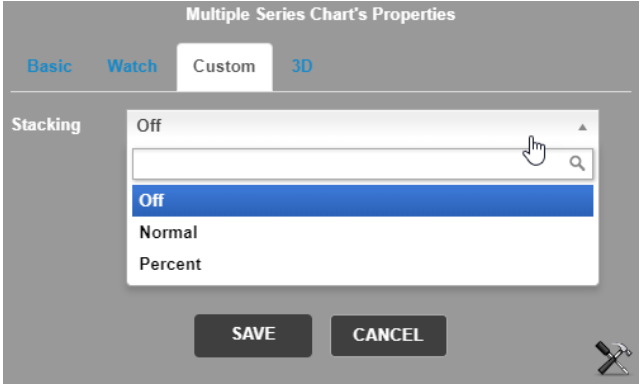
**3D:** Change the Caption, number stops, and colours used in the display

**Pie Chart 2's Properties**  
 Basic | Watch | 3D  
 Data Source: Pie Chart 2  
 Title: Pie Chart 2  
 Type: Chart - Pie  
 SAVE CANCEL

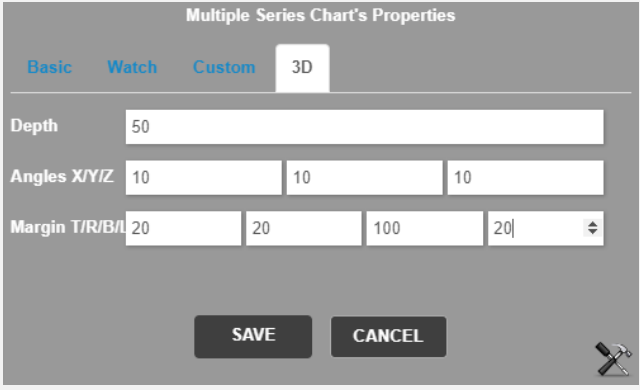
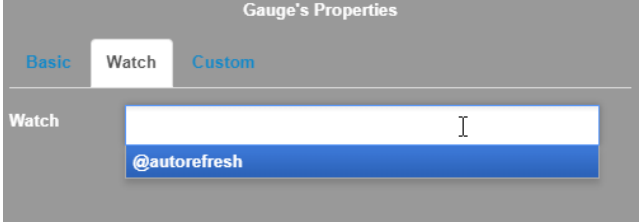
**Pie Chart 2's Properties**  
 Basic | Watch | 3D  
 Broadcast: @@Outcome x  
 Watch: @@EmployeeSite x @@Incident\_Location x @@IncidentInvolved x  
 SAVE CANCEL

**Pie Chart 2's Properties**  
 Basic | Watch | 3D  
 Depth: 0  
 Angles X/Y/Z: 0 0 0  
 Margin T/R/B/l: 0 0 0 0  
 SAVE CANCEL

## Widget Property Menus

Property Type	Description	Screenshot
<p><b>Basic Properties</b></p>	<p>You can change the tile of the chart and chose the Type of chart that will display.</p>	
<p><b>Watch Properties</b></p>	<p>You can select to display a Multiple Series chart in a stacked format, calculated by number or percentage.</p>	
<p><b>Custom Properties: Gauge</b></p>	<p>You can change the caption on the gauge face as well as alter the thresholds and colours displayed.</p>	
<p><b>Custom Properties: Multi Series Chart</b></p>	<p>You can select to display a Multiple Series chart in a stacked format, calculated by number or percentage.</p>	



<p><b>Custom Properties: 3D</b></p>	<p>Bar, Column, and Pie charts can be displayed with a 3D effect applied. The settings in the example above can be used as a starting point if you wish to try this effect.</p>	
<p><b>Watch</b></p>	<p><i>Note: There is a default <b>Watch</b> property that is automatically available in each Widget. <b>@autorefresh</b> will instruct the Widget to refresh its content every five minutes. This will keep the chart up to date.</i></p>	

## Broadcast / Watch

The InfoCentre Broadcast / Watch functions allows InfoCentre Widgets to send and receive data to each other.

The effect of this is that a user can click on an element in one widget and the data in a different widget will change, being filtered by the user's selection.

		<p>The Gauge Widget is displaying the total number of incidents (28) recorded and is watching Location (Site).</p> <p>The Bar chart is displaying Incidents by facility and is broadcasting Location (Site).</p>
		<p>If you click on the Cabell Huntington bar which has 5 incidents, the Facility Widget will Broadcast the Cabell Huntington site data as a filter to the Gauge that is watching.</p>
		<p>The Gauge will receive the Broadcast data and change to display only the number of incidents at the Cabell Huntington Location.</p>
		<p>If you view the Watch tab under the Widgets Properties you can see the Watch and Broadcast properties of each Widget.</p> <p>Note that the field being Broadcast is called @@Site, this is the database name of the Incident form field.</p>
		<p>The System Broadcast Monitor (SBM) is a default Datasource that is available to you for checking and resetting Broadcast data.</p> <ol style="list-style-type: none"> <li>1 The Widget is Broadcasting Site</li> <li>2 The SBM shows the Key and Value</li> <li>3 Click <b>Clear All</b> to reset Widget data</li> </ol>