



PNMsoft Knowledge Base

Sequence User Guides

Dashboard Deployment

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Product Version 7.0 and above

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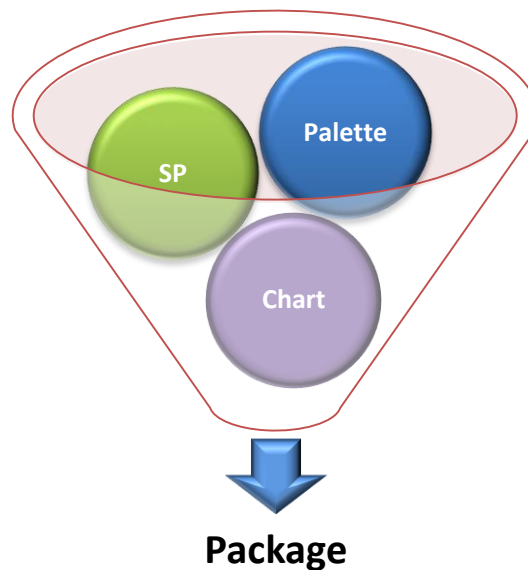
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Overview

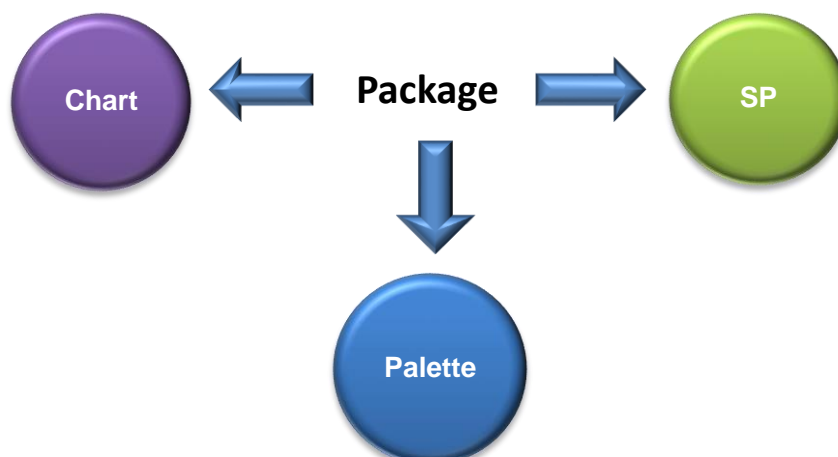
Sequence provides powerful business intelligence tools, enabling you to build and add to monitoring charts and dashboards to your Sequence solution (see the *Monitoring and Reports Guide* for more information on this topic).

The Dashboard Deployment feature enables you to export and import Sequence dashboard objects such as charts, stored procedures, indicators and palettes between environments. This saves you the time required to create new dashboard objects from scratch.

The first step is to select the dashboard objects and export them into a package:



Then, in the destination environment, you import the package, and the objects are unpacked and saved in the new environment:



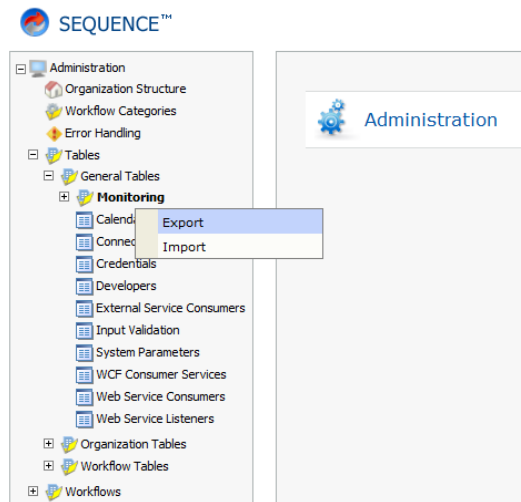
This guide describes how to perform both these steps.

Exporting Dashboard Objects

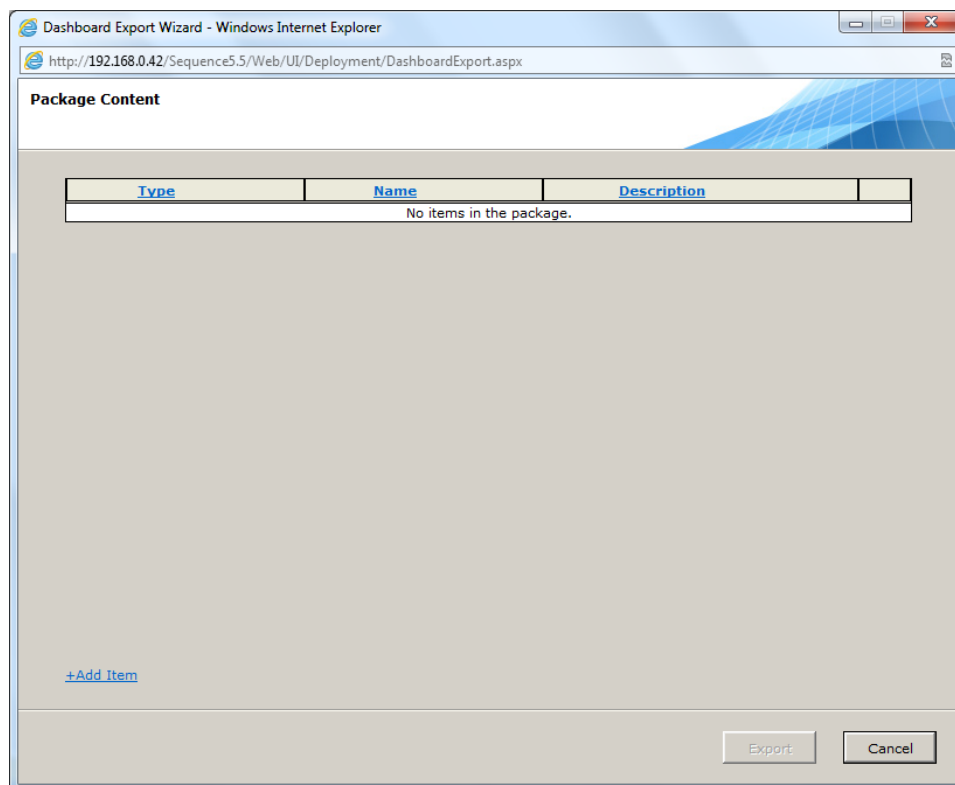
You export Dashboard objects into a package using the *Dashboard Export Wizard*.

To export dashboard objects:

1. In Sequence Administration, in the Administration Tree, navigate to **Tables > General Tables > Monitoring**.
2. Right-click **Monitoring**, and select **Export**. The *Package Content* screen appears.



Sequence Administration



Package Content Screen

- Click **Add Item**. The *Add Item to Package* screen appears.

Add Item to Package

Item Type
Chart

	Name	Description
<input type="checkbox"/>	Number of Tasks Per St...	How many tasks are listed in each status.
<input type="checkbox"/>	New Tasks Per Month	Number of tasks that were created for each month over the past 12 months.
<input type="checkbox"/>	New Workflows Per Month	How many new workflows were created for each month over the past 12 months
<input type="checkbox"/>	Number of Tasks Per St...	How many tasks are listed in each status.
<input type="checkbox"/>	Number of Workflows P...	How many of the workflows are still open and how many were closed.

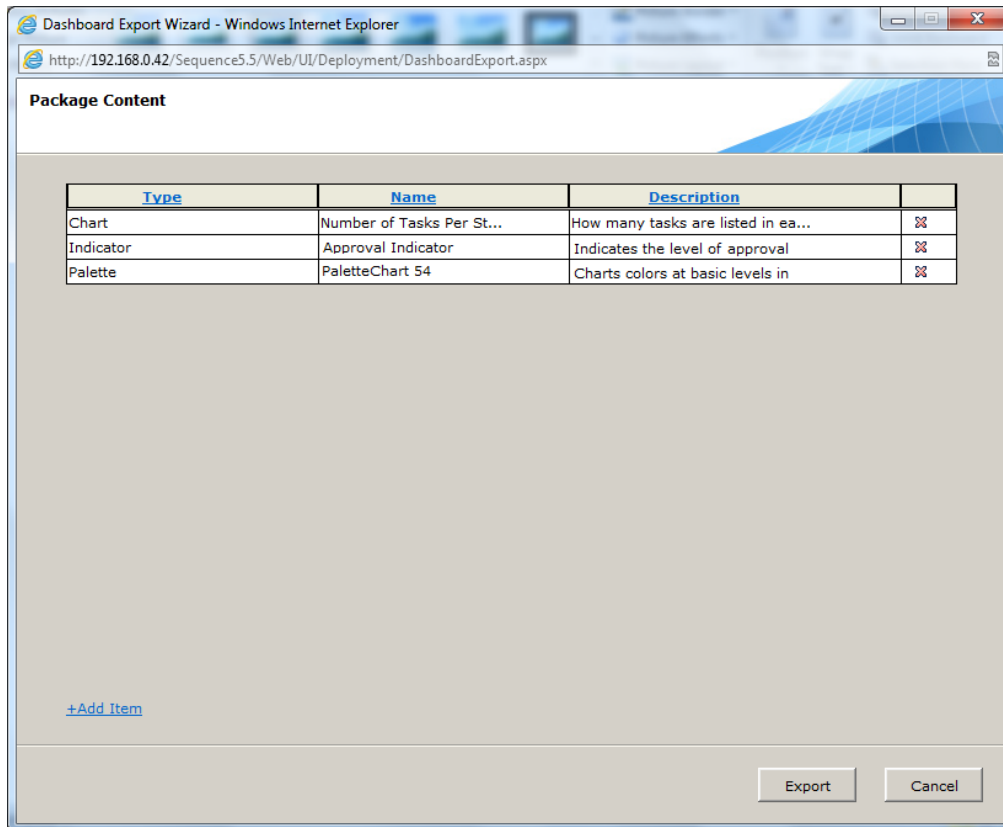
☐ Include Dependencies

Add Items Cancel


Add Item to Package Screen

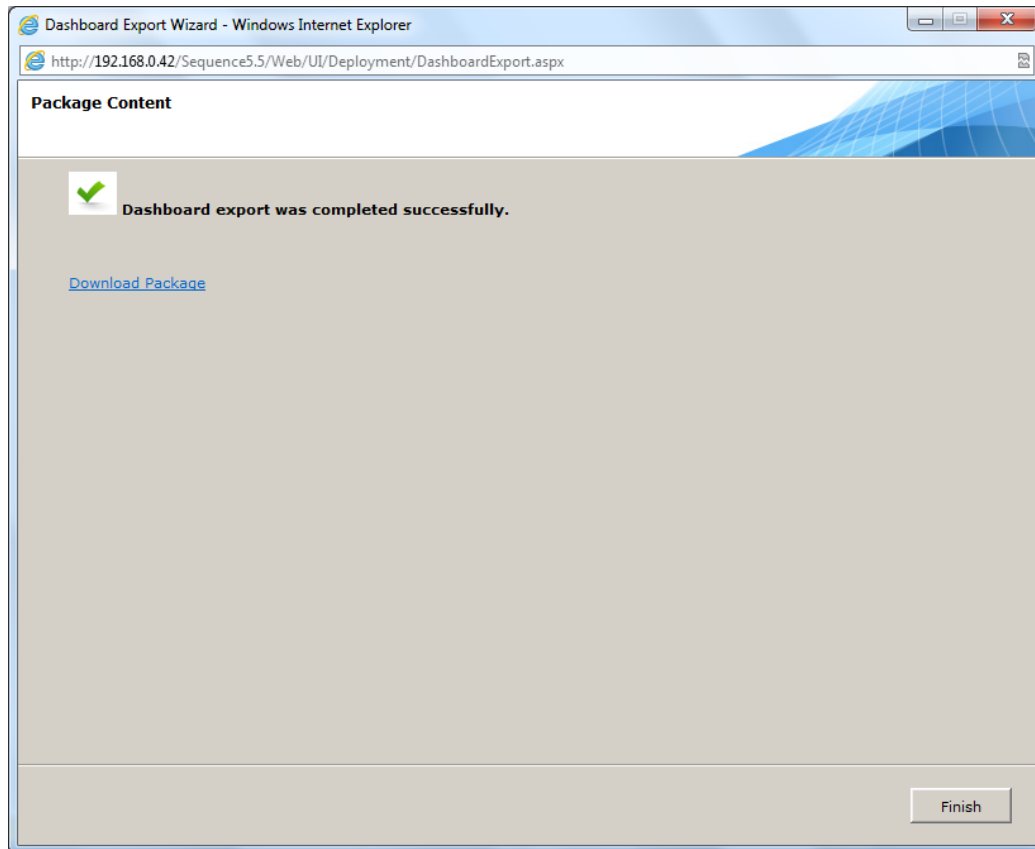
- In the **Item Type** area, select the type of object from the dropdown list. The following object types can be selected:
 - Chart
 - Dashboard Filter
 - Indicator
 - Palette
 - Stored Procedure

Once you have selected the type, the existing objects of this type are displayed in the box below with their name and description.
- Click the checkbox beside the desired objects.
- (Optional) Click **Include Dependencies** to include in the package objects on which the selected object depends. For example, if you select a chart which is built using a stored procedure, an indicator or a palette, Sequence includes these objects in the package as well, even though you have not explicitly selected them.
- Click **Add Items**. The Items are added to the *Package Content* screen.



Dashboard Export Wizard - Package Content

8. (Optional) Click **Add Item** to add more items.
9. (Optional) Click  to delete an item.
10. Click **Export**. The package is created.



Package Content Screen – Package Successfully Created

11. Click **Download Package** to download the package to your local computer.
A browse window opens and you can select the location to save the package zip file.

***Note:** You must download the package in order to save it. Sequence does not keep track of exported packages.*

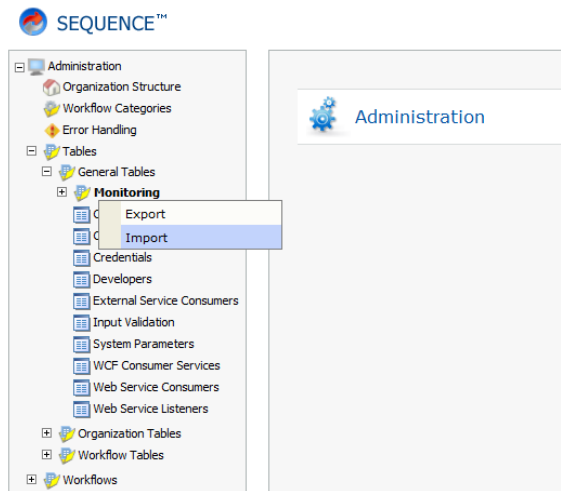
12. Click **Finish**.

Importing a Dashboard Package

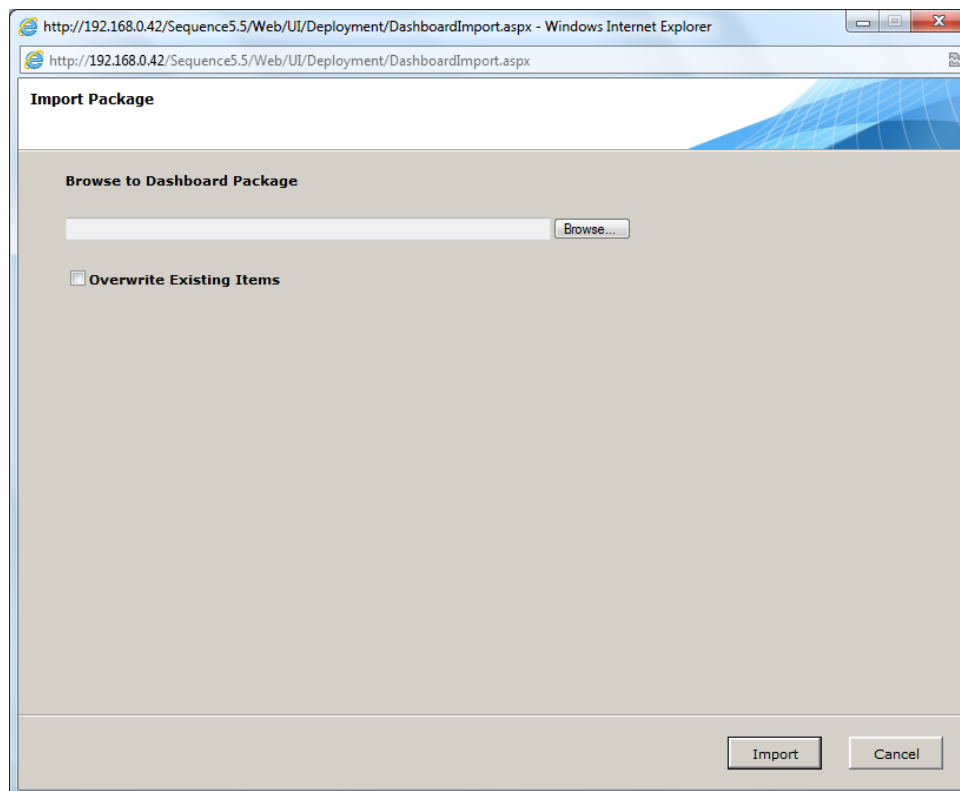
You import Dashboard packages using the *Dashboard Import Wizard*.

To import a dashboard package:

1. In Sequence Administration, in the Administration Tree, navigate to **Tables > General Tables > Monitoring**.
2. Right-click **Monitoring**, and select **Import**. The *Import Package Screen* appears.

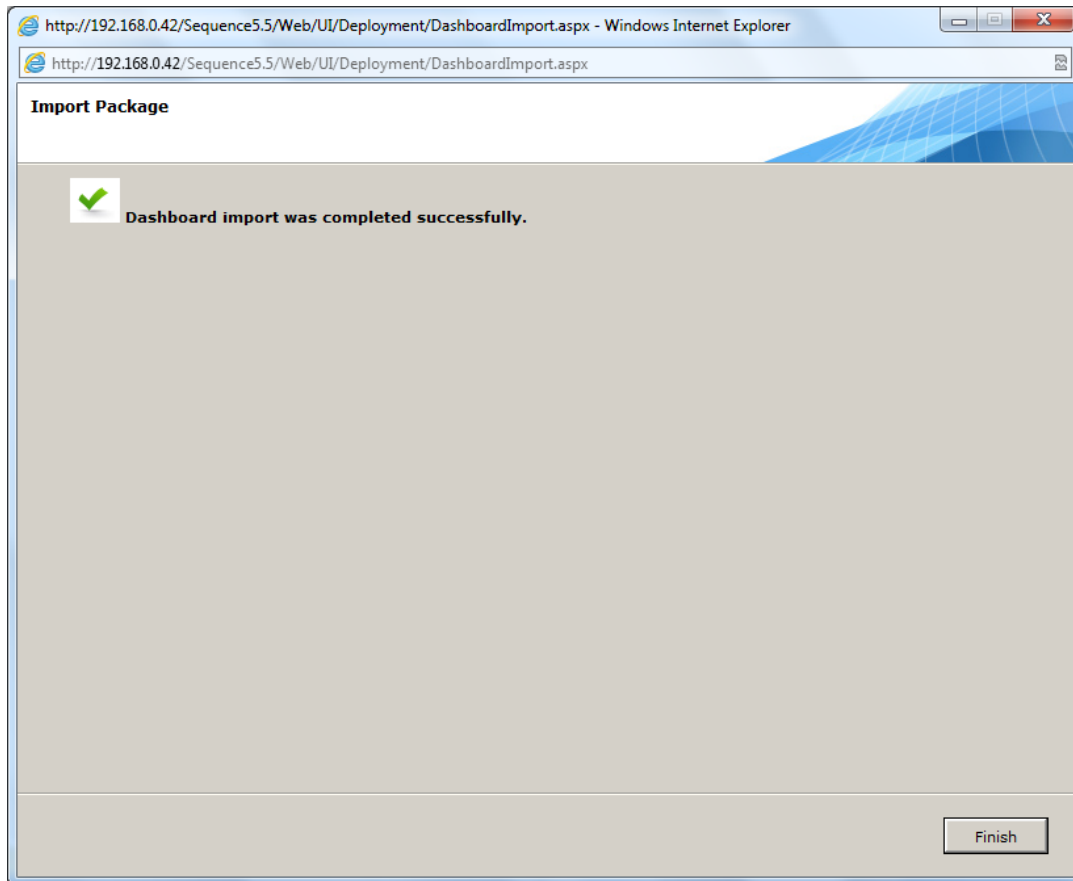


Sequence Administration



Import Package Screen

3. Click **Browse**. A browse window opens.
4. Browse your computer for the Package zip file you wish to import and click **OK**.
5. (Optional) click **Overwrite Existing Items** to overwrite existing dashboard objects with the same name.
6. Click **Import**. The dashboard objects are imported.



Package Imported Successfully

7. Click **Finish**.

Notes:

- The Dashboard Deployment feature supports deployment of Sequence dashboard objects, not Flowtime display objects. To export Flowtime display objects and configuration, such as dashboard web parts, use SharePoint deployment options.
- When importing a package, if an object with the same name exists and you do not select the **Overwrite existing objects** option, the import will succeed, but Sequence will skip this object.
- After importing a package, even if you received the message: “Dashboard import was completed successfully”, it is recommended to check the import log of the import in: *C:\Program Files\PNMsoft\Shared Resources*. The log may contain information about objects which may not have been imported.
- When importing a package, if you select a package file that is not a zip file, you will receive an error message and the package will not be imported.
- Checking the option **Export Dependencies** in the when importing a chart will include the following objects in the package which are part of that chart: palettes, indicators, stored procedures. In other cases, though, not all dependent objects are imported. For example, if you import a dashboard filter which is based on a combo box, the table of the combo box is not imported.
- Please refer to the *Monitoring and Reports Guide* in the Sequence Knowledge Centre for more information on this topic.