Add an Insights Dashboard Widget

Setup Guide

Document Details

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Overview

This document shows Crunchtime Insights Power Users how to add an Insights Widget to their Dashboard layout in Enterprise Manager and Net-Chef.

Download the latest version of this document here:
https://links.crunchtime.com/SG-InsightsWidgetSetup

… or scan the QR code to the left.

Related User Group Permissions

Screen Name	Control Name	Description
NC-Dashboard	Edit Layout	Allows users to edit their own layout.
NC-Dashboard	Edit Corporate Layout	Allows users to edit the Corporate layout.

Notes: The permission noted above only applies to the Net-Chef Dashboard; there is no permission control associated with editing the Dashboard layout in Enterprise Manager.

Also, in Net-Chef, users will only see data for the locations linked to their Application User record.

Related Documentation

- Crunchtime Insights Reference Guide: https://links.crunchtime.com/RG-CrunchtimeInsightsReference

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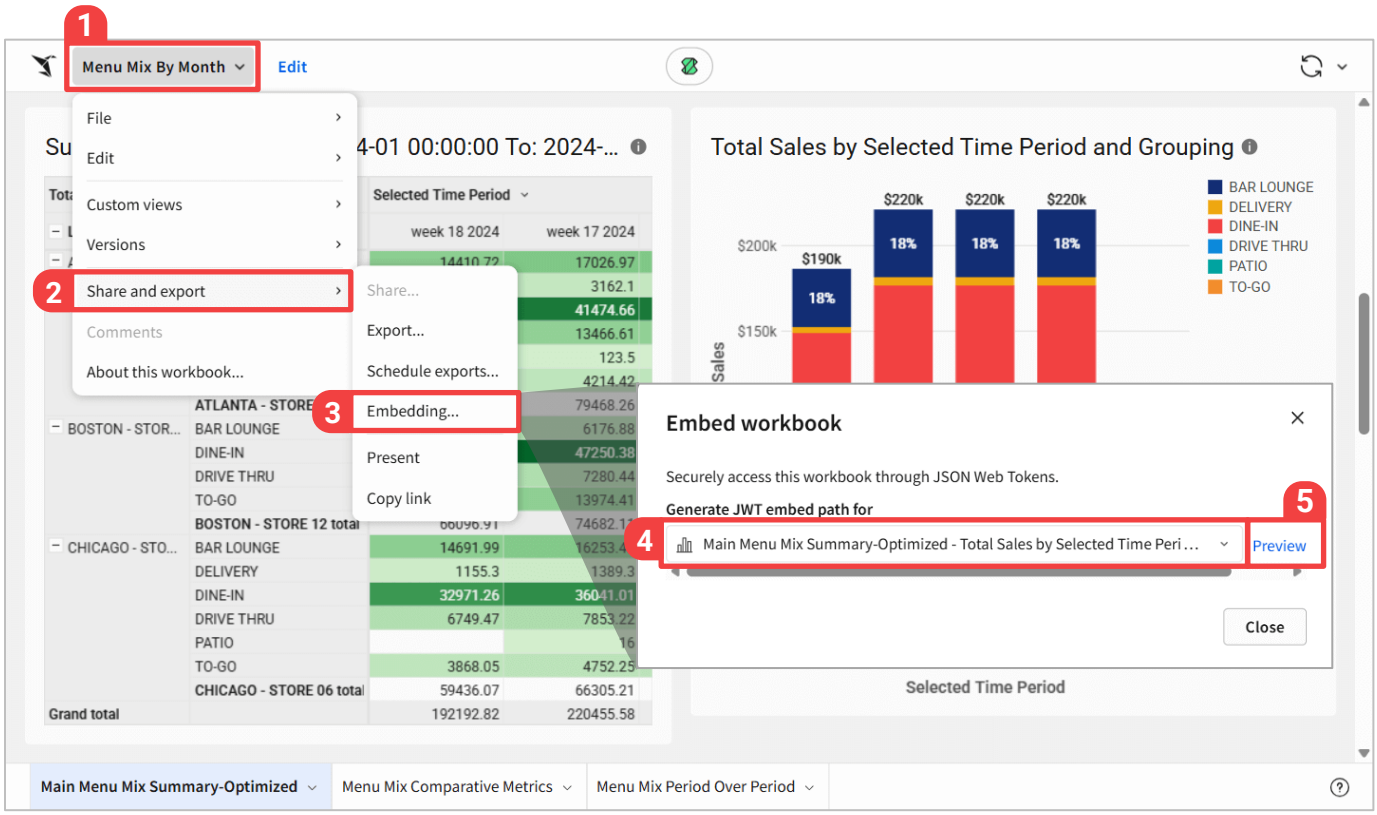
Add an Insights Dashboard Widget

Copy the Workbook Element URL

To start, open the applicable published Insights workbook, then copy the URL for the desired report, chart, or the workbook by following the steps below.



1. Open the *Workbook Title* menu.
2. Select *Share and export*.
3. Choose *Embedding*.
4. Select the desired workbook element to embed. (For example, the bar chart seen on the right.)
5. To proceed, select *Preview*.

Note: In this example, we selected a specific workbook element. You do have the option to embed the entire workbook if you wish.

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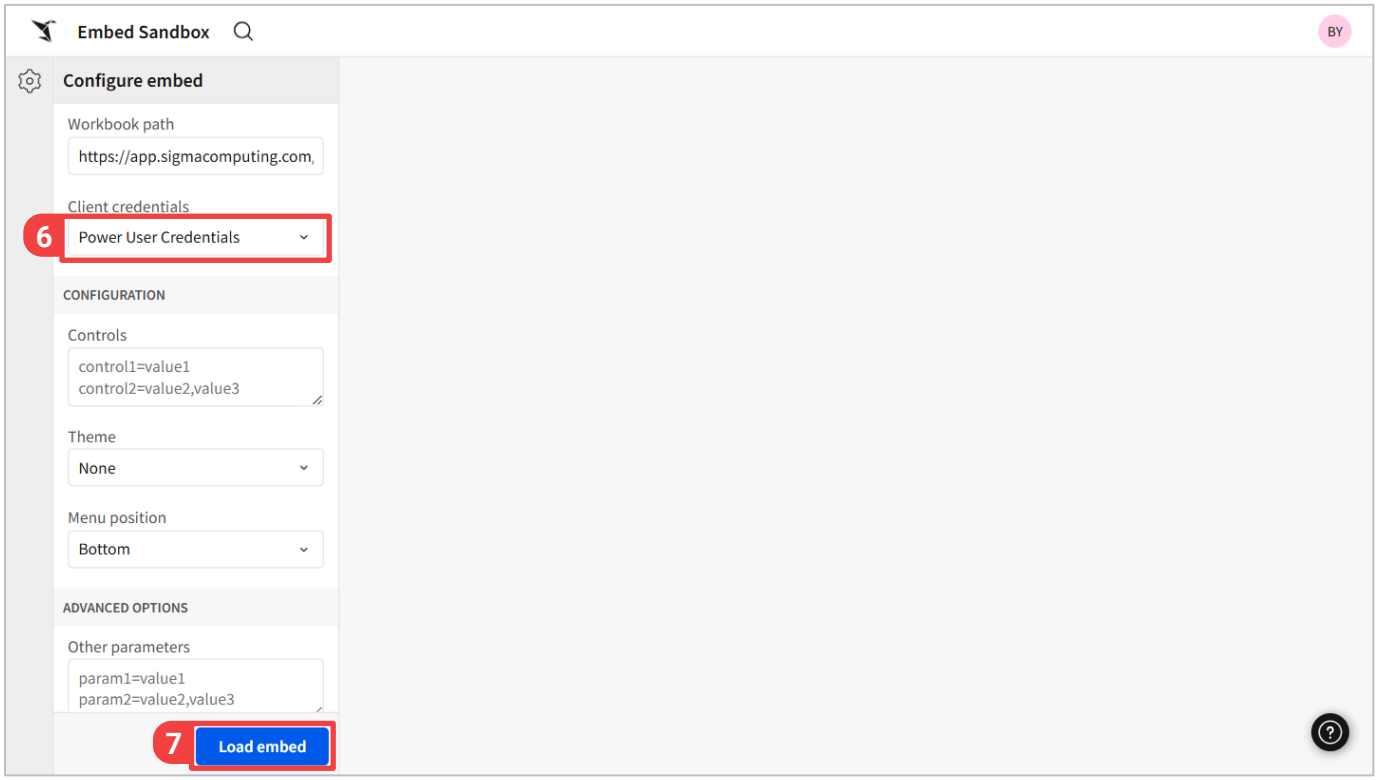
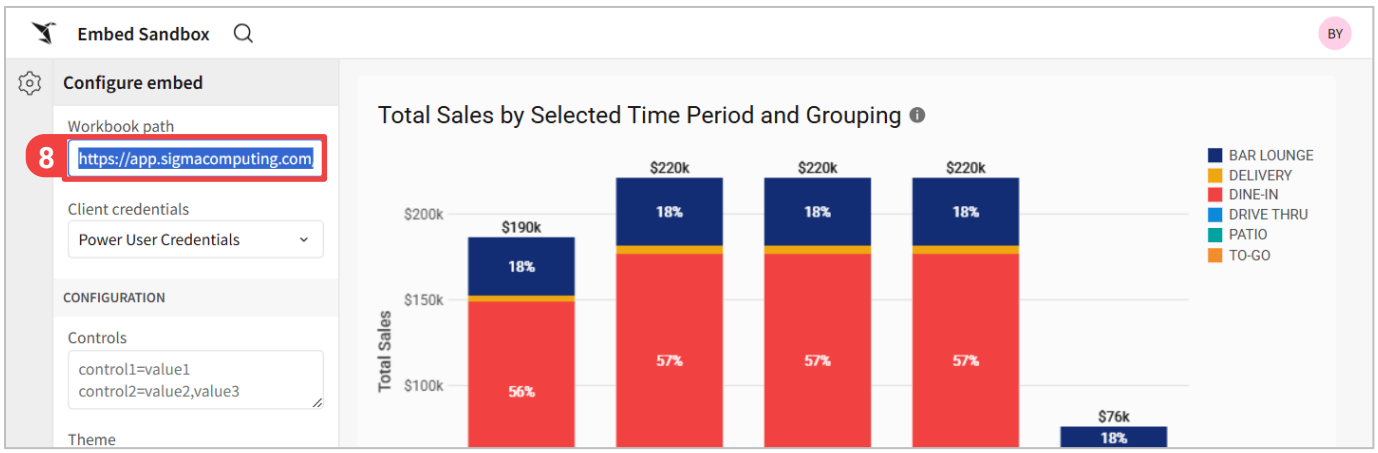
Add an Insights Dashboard Widget

Copy the Workbook Element URL (Continued)



6 Select the *Client credentials*. ('Power User Credentials' will be the sole option.)

7 To preview the workbook element, click *Load Embed*.



8 Then select and copy the *Workbook path*.

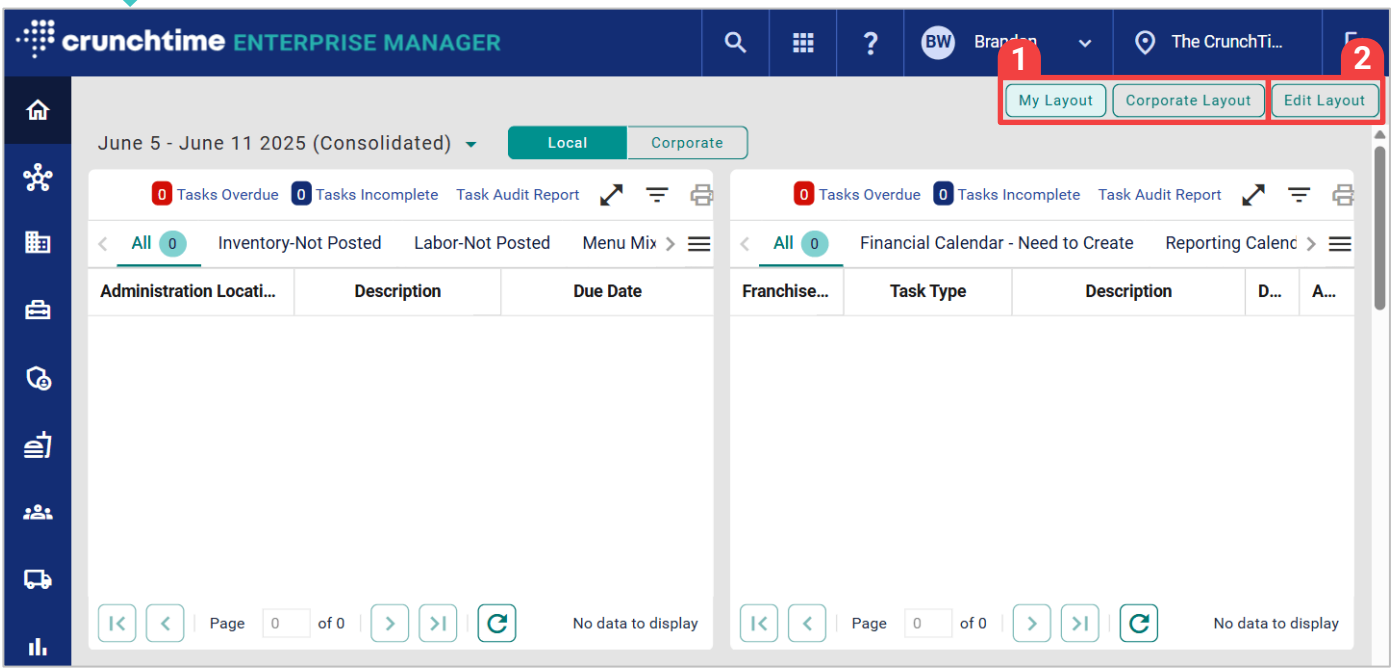
SETUP GUIDE

Add an Insights Dashboard Widget

Enterprise Manager Dashboard

Follow this process to add the Insights Widget to the Enterprise Manager dashboard.

Enterprise Manager > Dashboard



1. From the Dashboard, select the layout to edit – either *My Layout* (your default view) or *Corporate Layout* (everyone's default view, configured by Corporate).
2. Then select *Edit Layout*.

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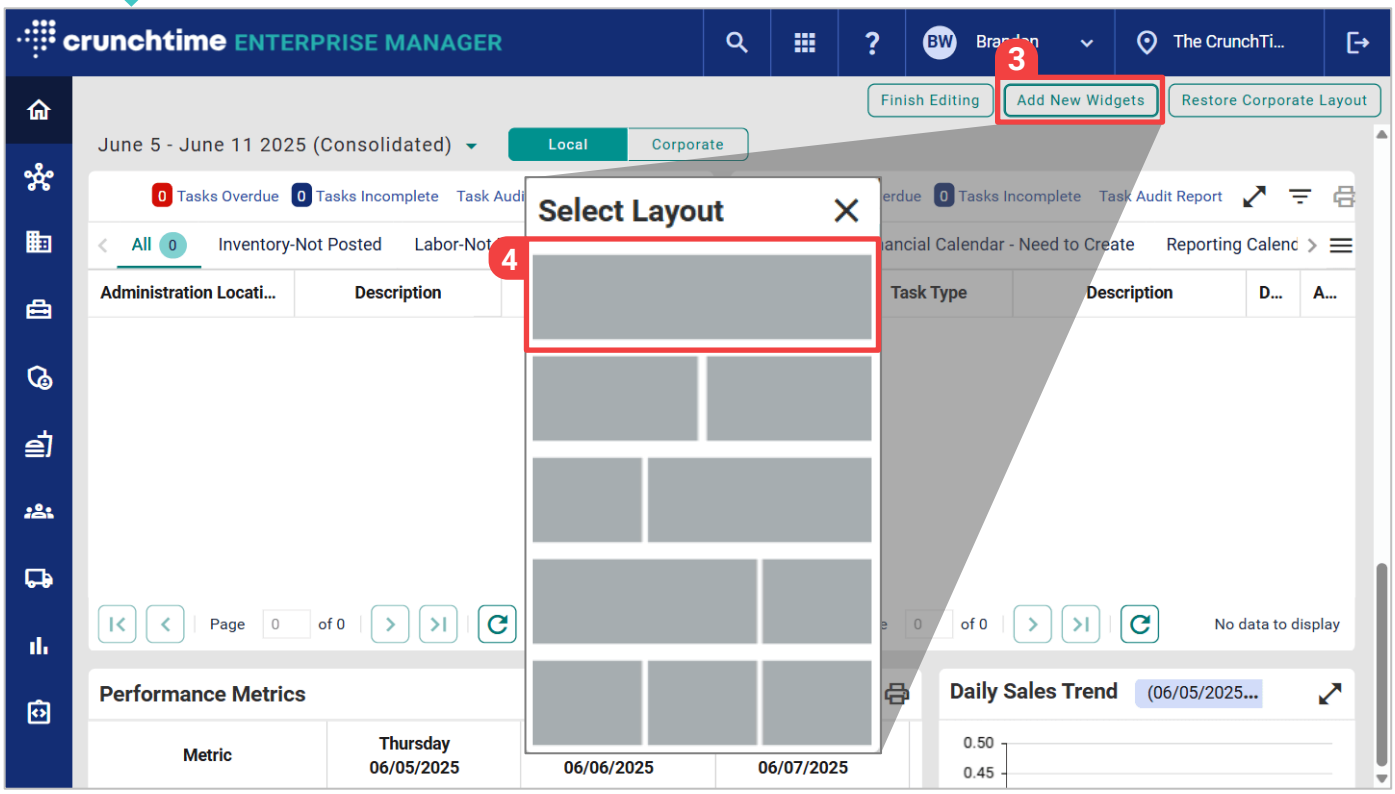
Add an Insights Dashboard Widget

Enterprise Manager Dashboard (Continued)

Enterprise Manager > Dashboard > Edit Layout



3 Click *Add New Widgets*.

4 Select the desired Layout.

Note: In this example, we selected the top row but you can choose whichever layout is most appropriate for your needs.

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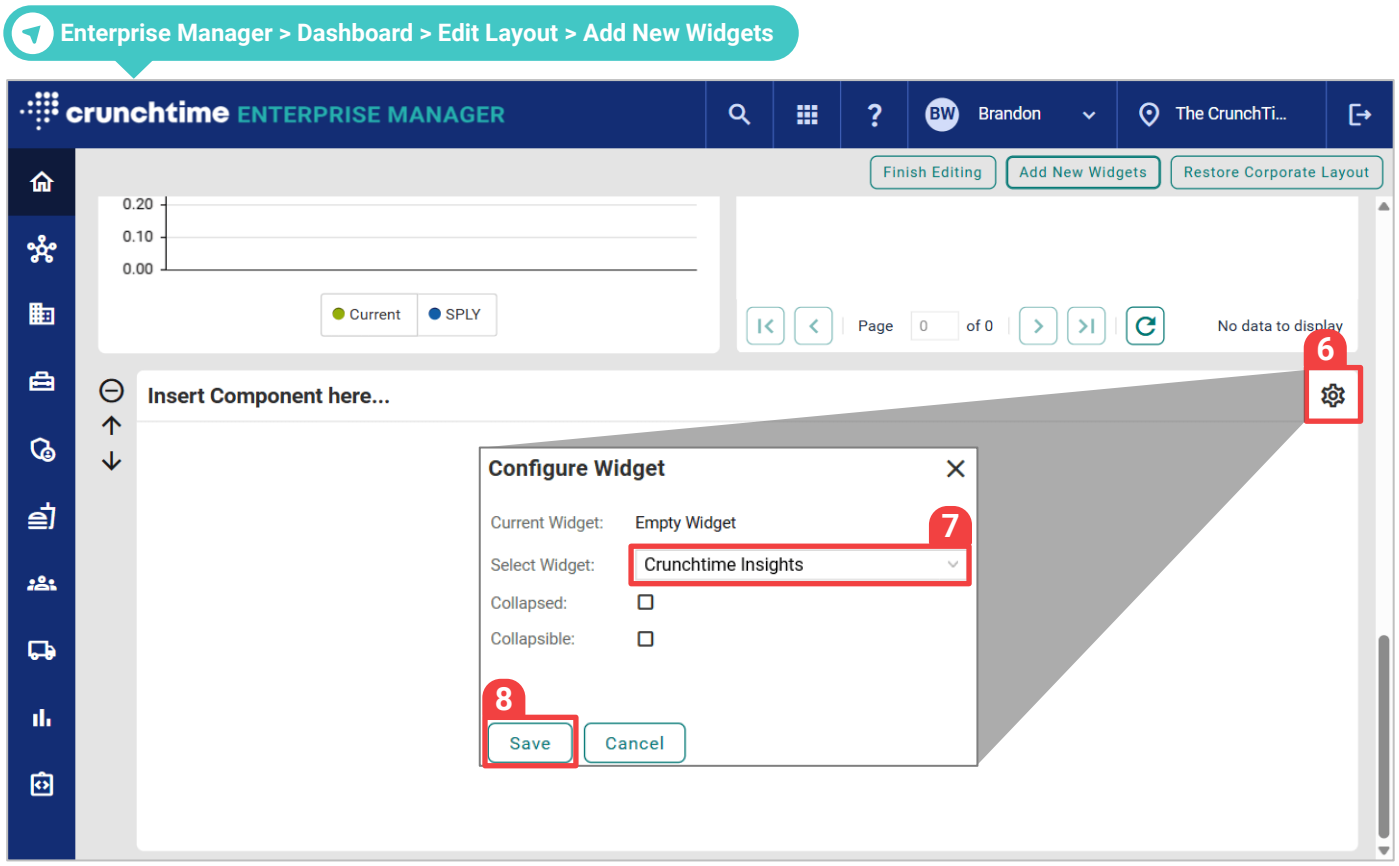
Add an Insights Dashboard Widget

Enterprise Manager Dashboard (Continued)



5. Scroll down to the display the widget you just added.
6. Click the *Configure Widget* icon.
7. In the *Select Widget* field, choose the **Crunchtime Insights** widget.
8. Then click *Save*.

Tip: Depending on which layout you're editing and the size of the widget row you chose, different check boxes (or none) will appear in the pop-up.

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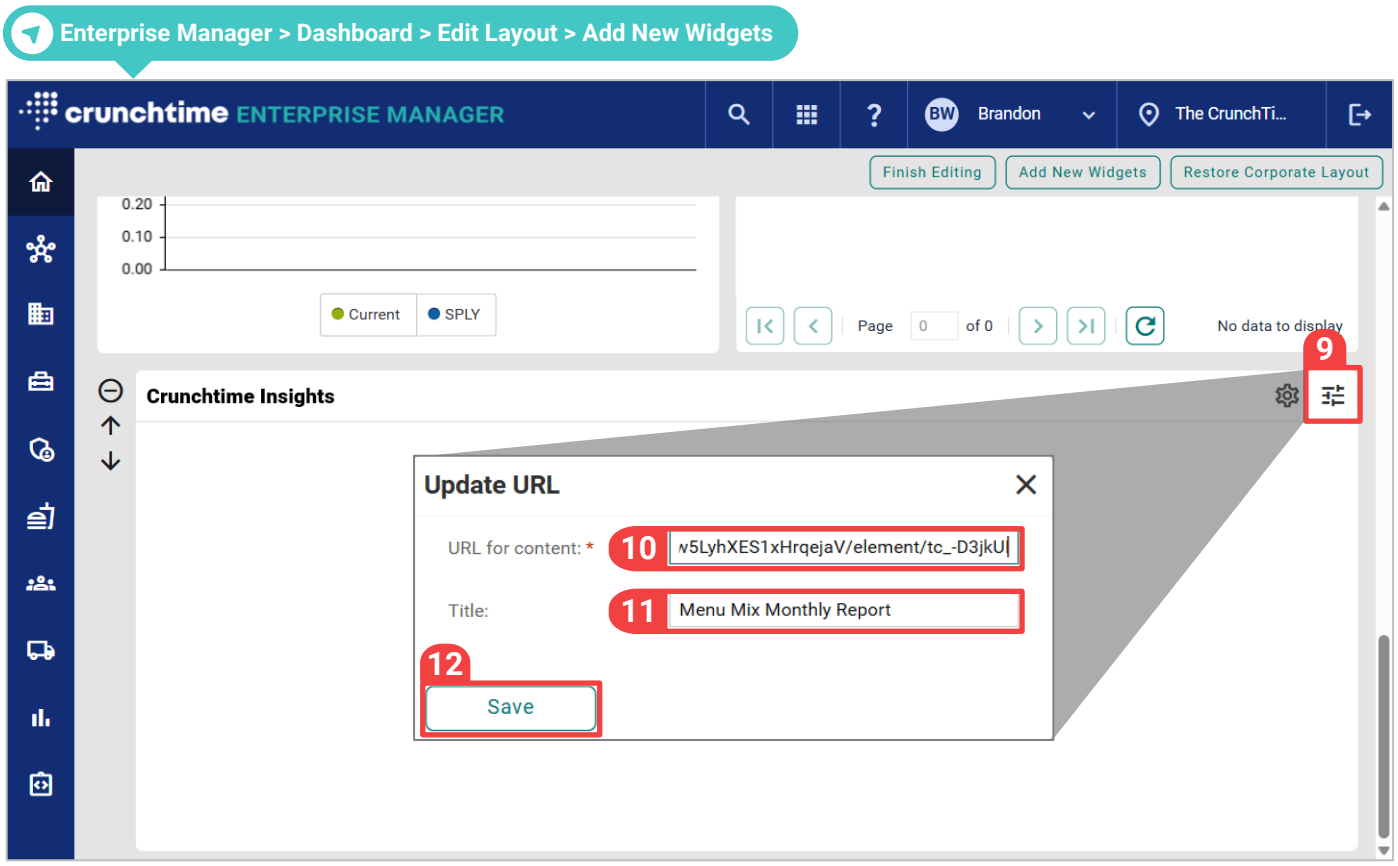
Add an Insights Dashboard Widget

Enterprise Manager Dashboard (Continued)



9. Click the *Change Parameters* icon.
10. In the *URL for Content* field, paste the URL you copied from Insights (on page 3).
11. Enter the desired report *Title*.
12. When finished, select *Save*.

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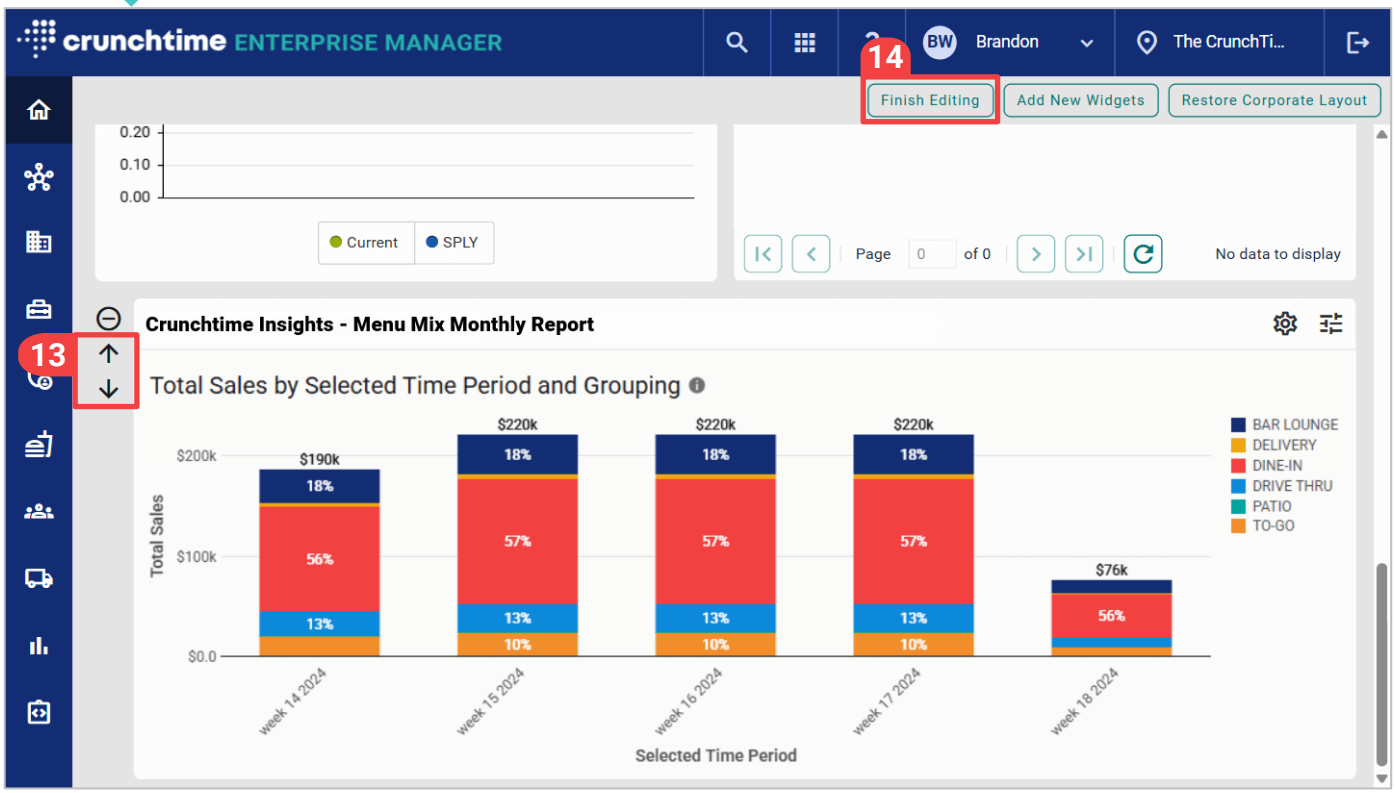
Add an Insights Dashboard Widget

Enterprise Manager Dashboard (Continued)

Enterprise Manager > Dashboard > Edit Layout



13 If necessary, use the Move Up/Move Down arrows to position the widget row as desired.

14 When done, select *Finish Editing*.

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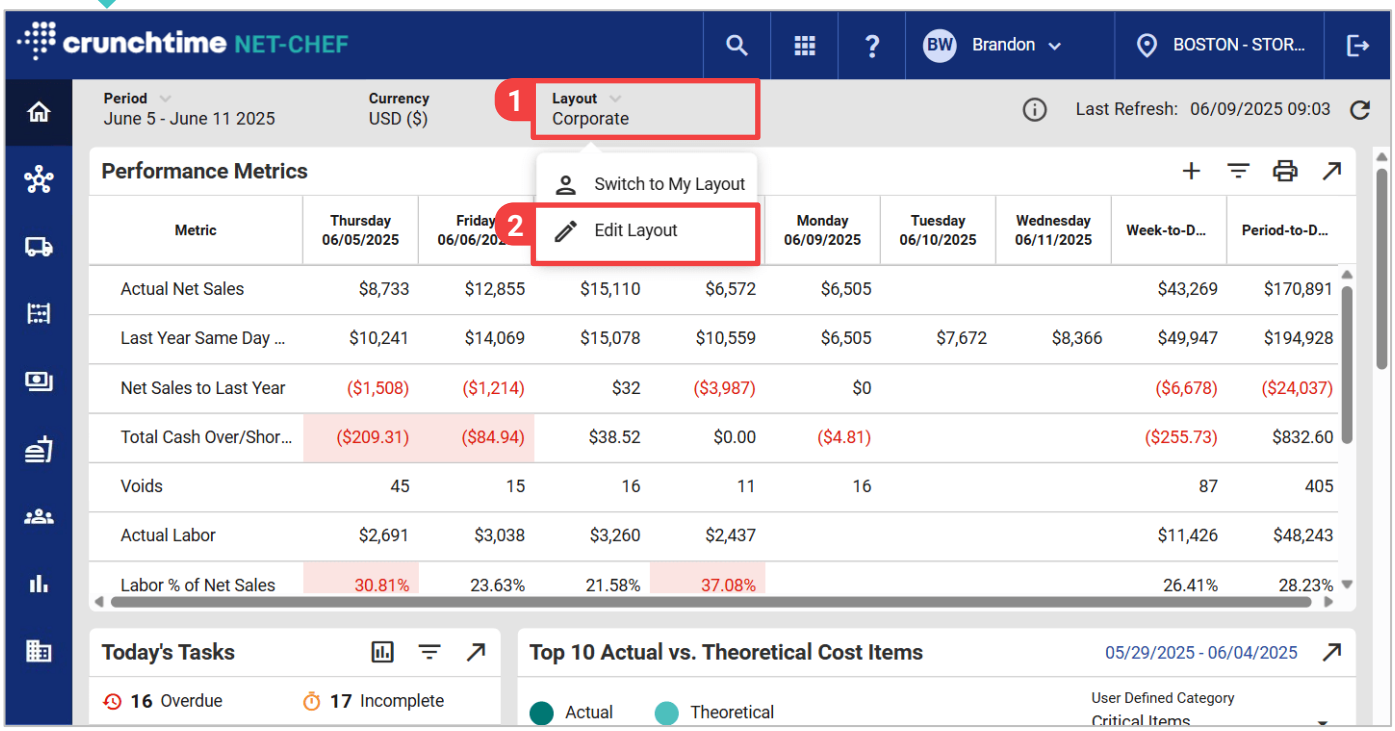
Add an Insights Dashboard Widget

Net-Chef Dashboard

Follow this process to add the Crunchtime Insights Widget to the Net-Chef dashboard.

Note: In Net-Chef, users will only see data for the locations linked to their Application User record.

Net-Chef > Dashboard



1. From the Dashboard, select the layout to edit – either *My Layout* (your default view) or *Corporate Layout* (everyone's default view, configured by Corporate).
2. Then select *Edit Layout*.

Notes: Only users with the *NC-Dashboard > Edit Corporate Layout* permission enabled can update this view. Users that do NOT have *NC-Dashboard > Edit Layout* enabled will see the Corporate Layout as their "My Layout" and will not be able to make any changes.

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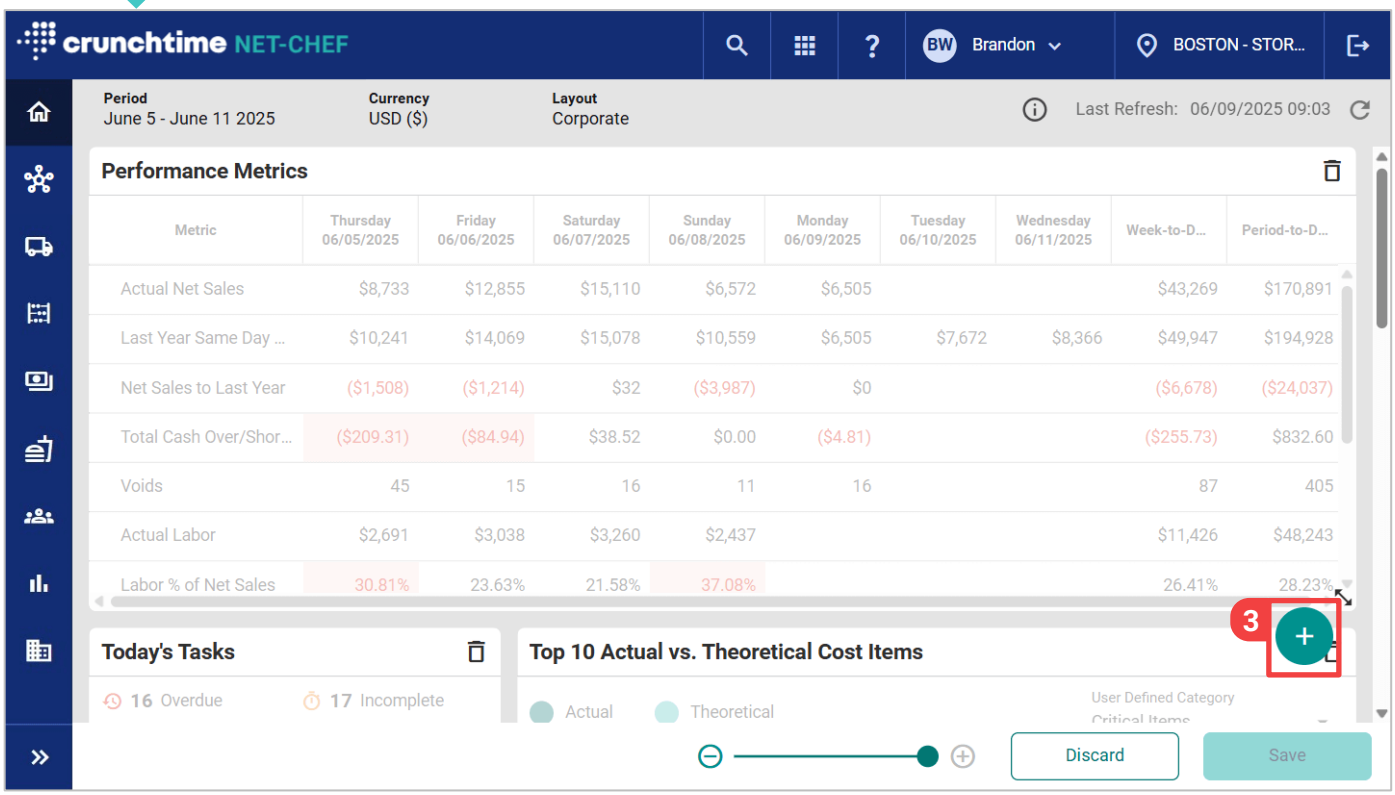
Add an Insights Dashboard Widget

Net-Chef Dashboard (Continued)

Net-Chef > Dashboard > Edit Layout



3 Click the (+) (*Add New Widgets*) icon.

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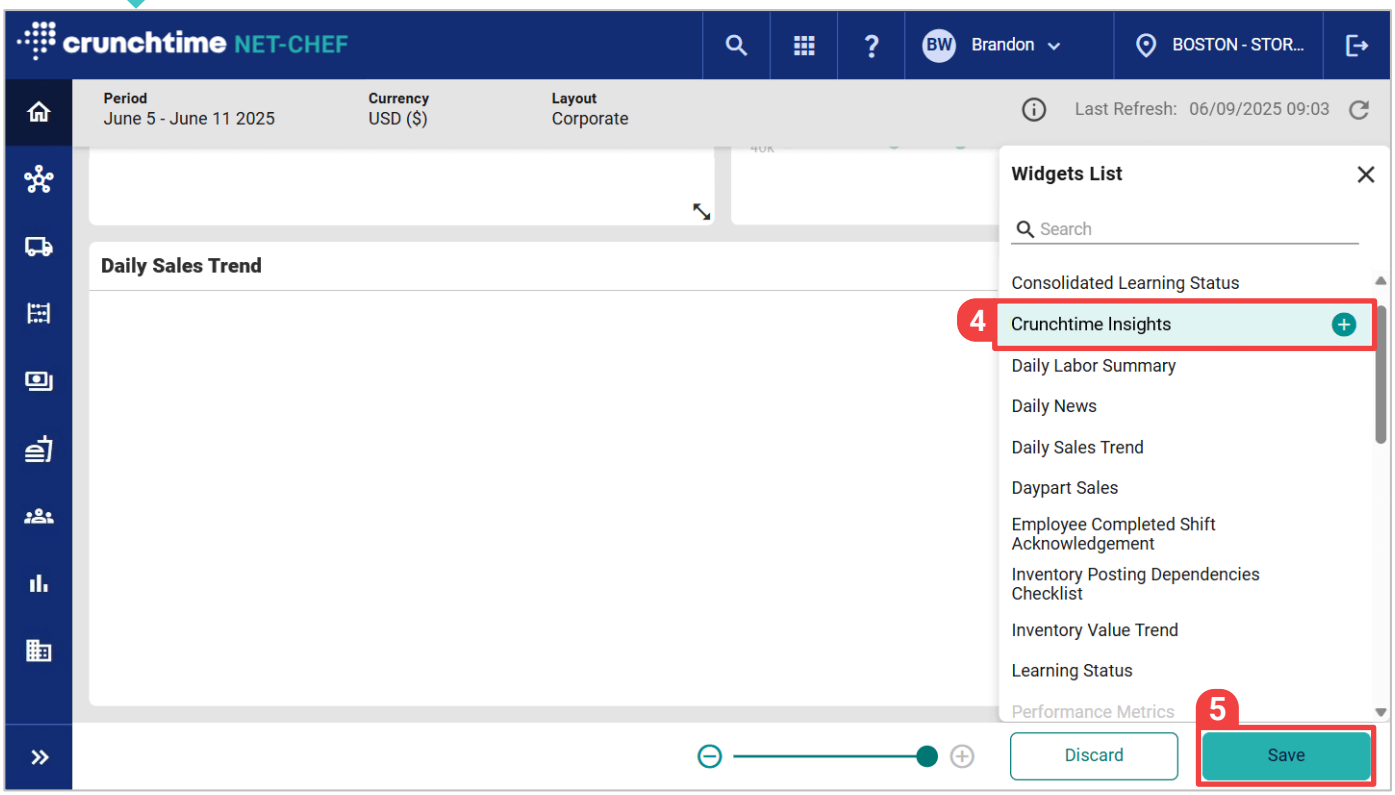
Add an Insights Dashboard Widget

Net-Chef Dashboard (Continued)

Net-Chef > Dashboard > Edit Layout



4 Choose the **Crunchtime Insights** widget.

Tip: While in the "Edit Layout" mode, you can click & drag anywhere on the widget to move it or over any of the widget's edges to resize it.

5 When ready, click *Save*.

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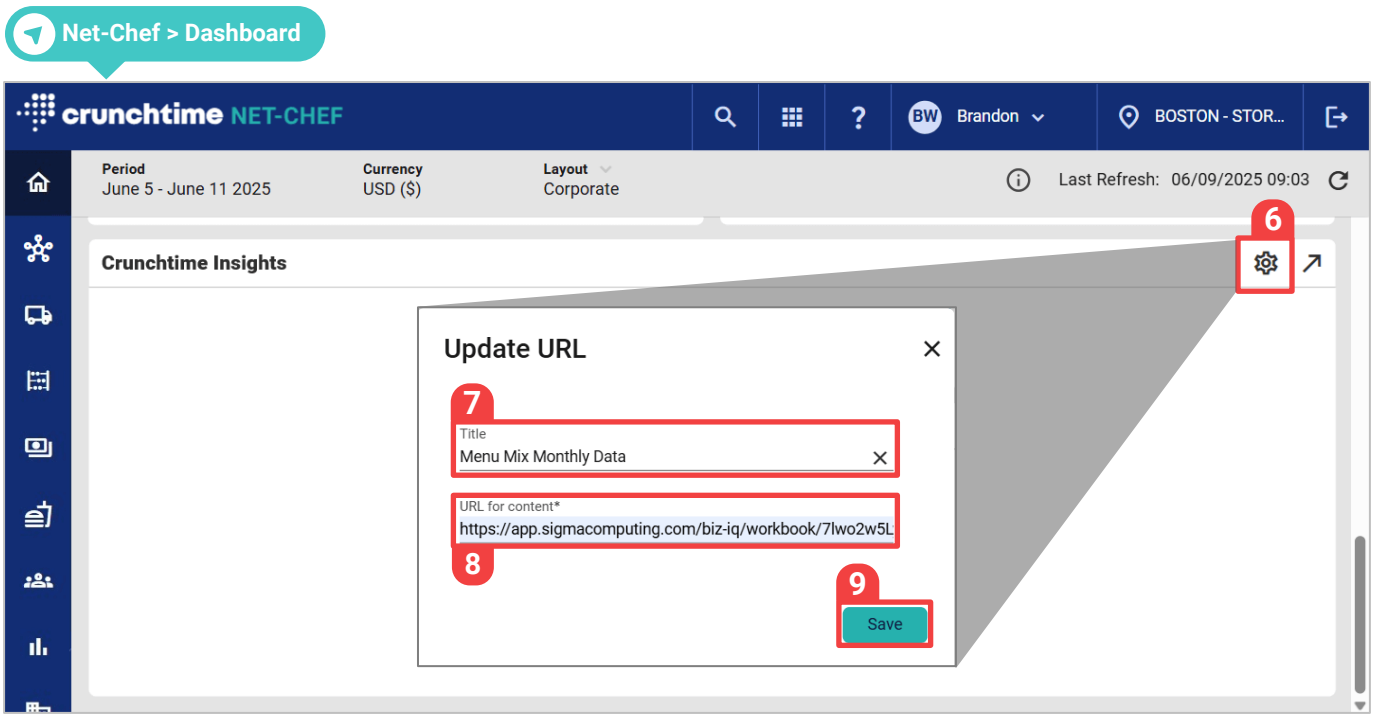
Add an Insights Dashboard Widget

Net-Chef Dashboard (Continued)



6. Click the *Widget Settings* icon.
7. Enter the desired report *Title*.
8. In the *URL for Content* field, paste the URL you copied from Insights (on page 3).
9. When finished, select *Save*.

   The widget then displays the selected report on the Dashboard, as seen below.

