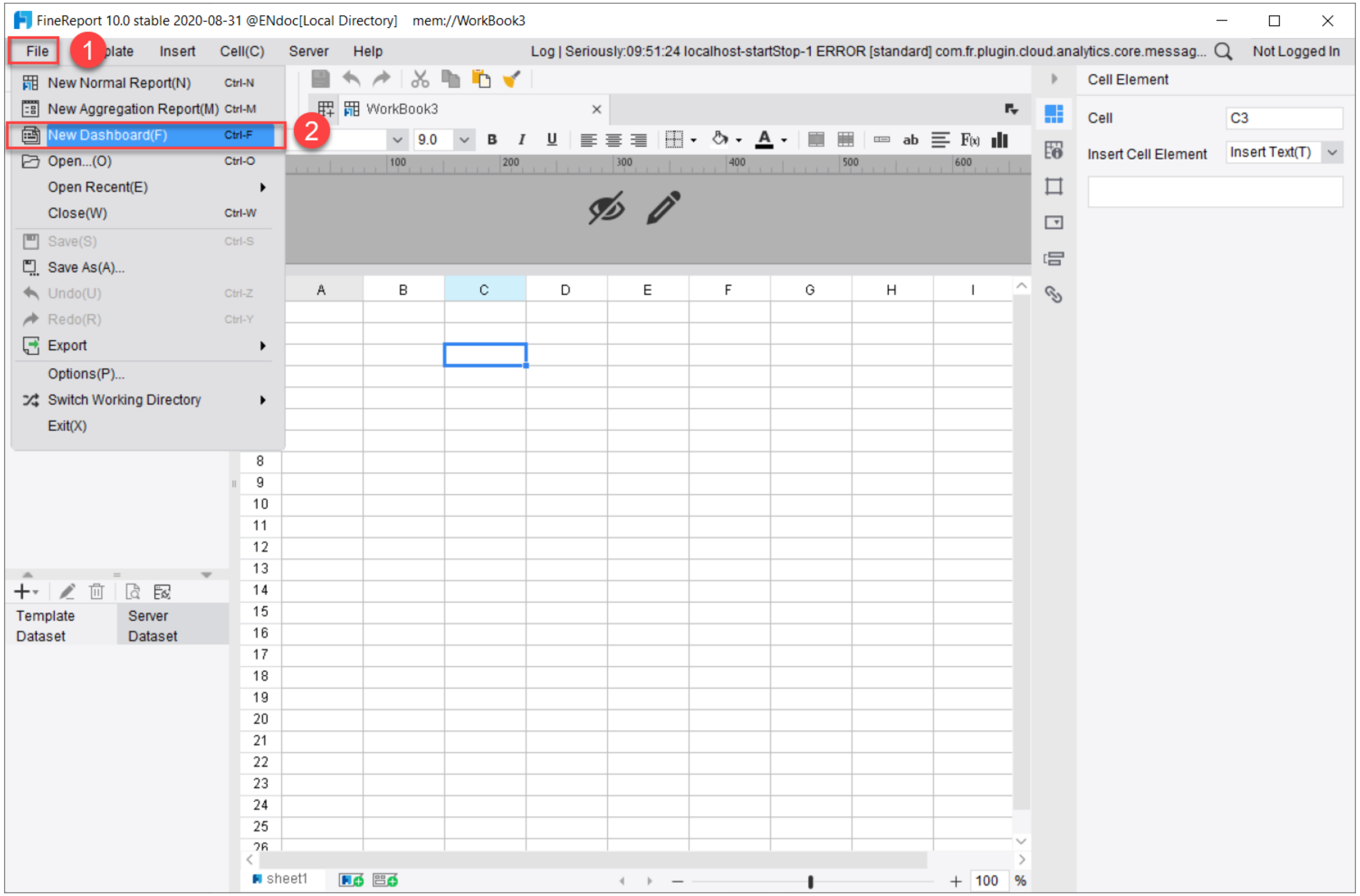
I. Template Preparation

To start, we have to create a new template and prepare the data to use.

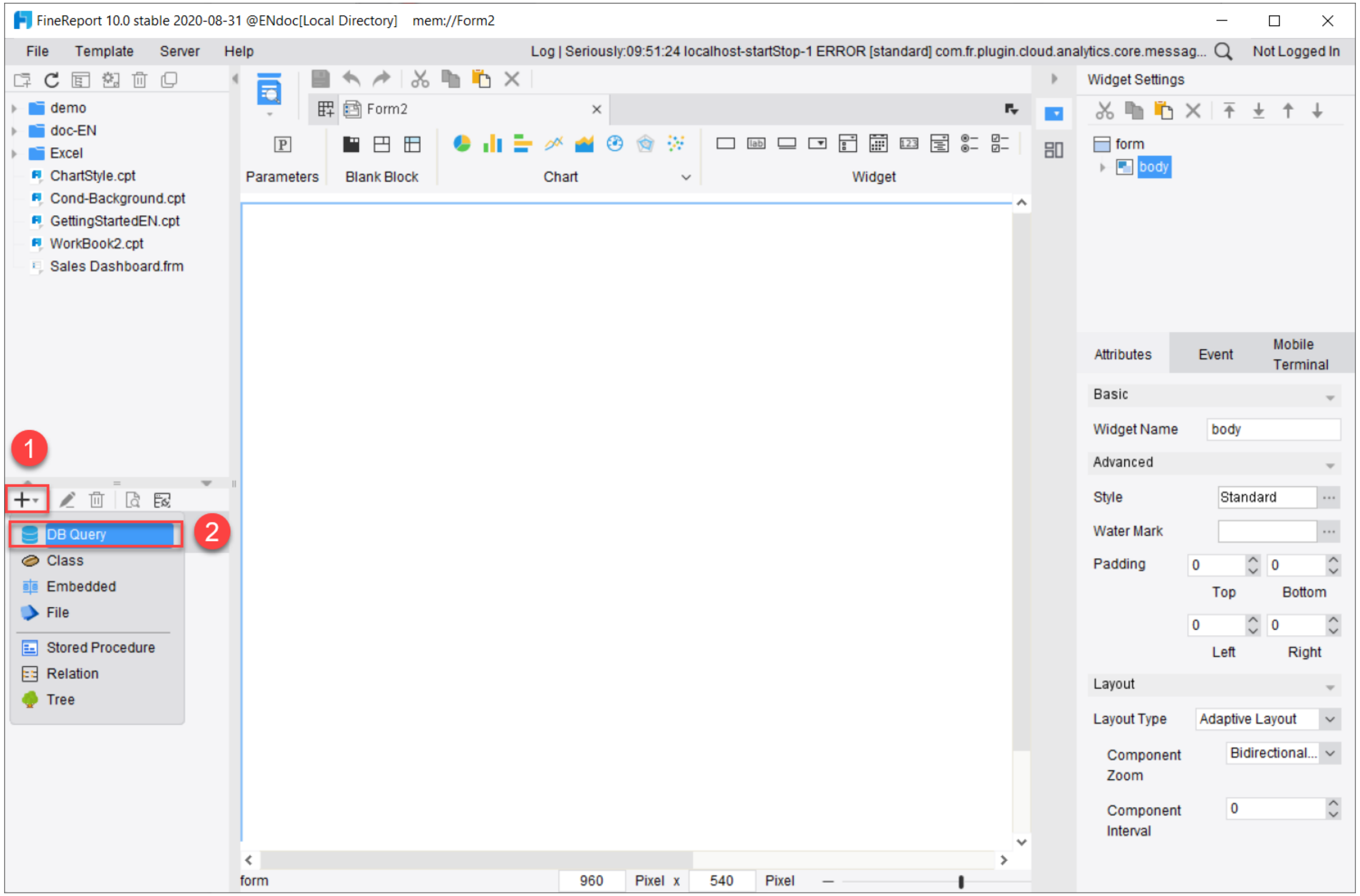
1. Create a New Dashboard

- Move to the toolbar manu at the top of the designer.
- Click **[File]>[New dashboard].** A new dashboard will pop up.

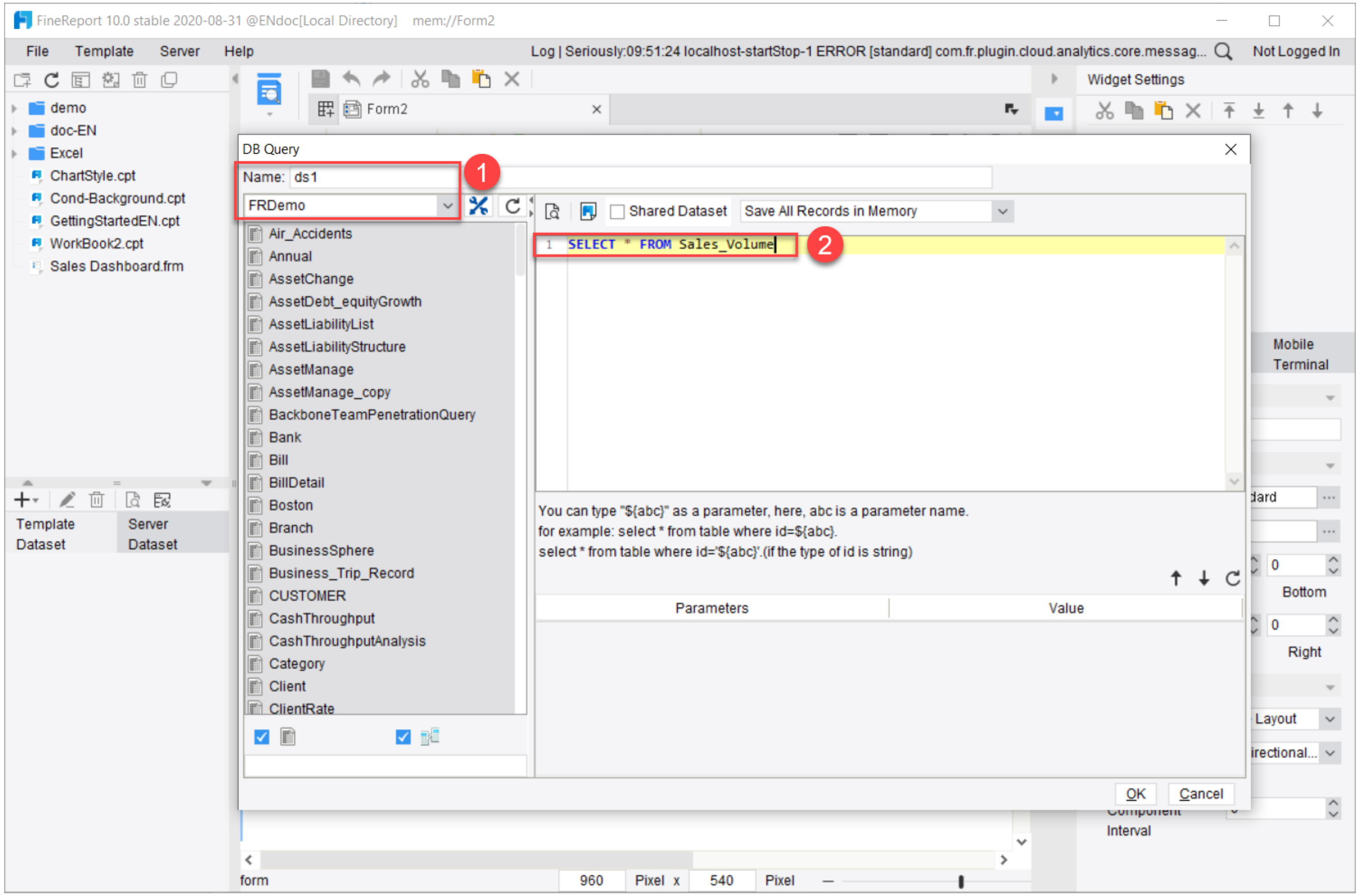


2. Data Preparation

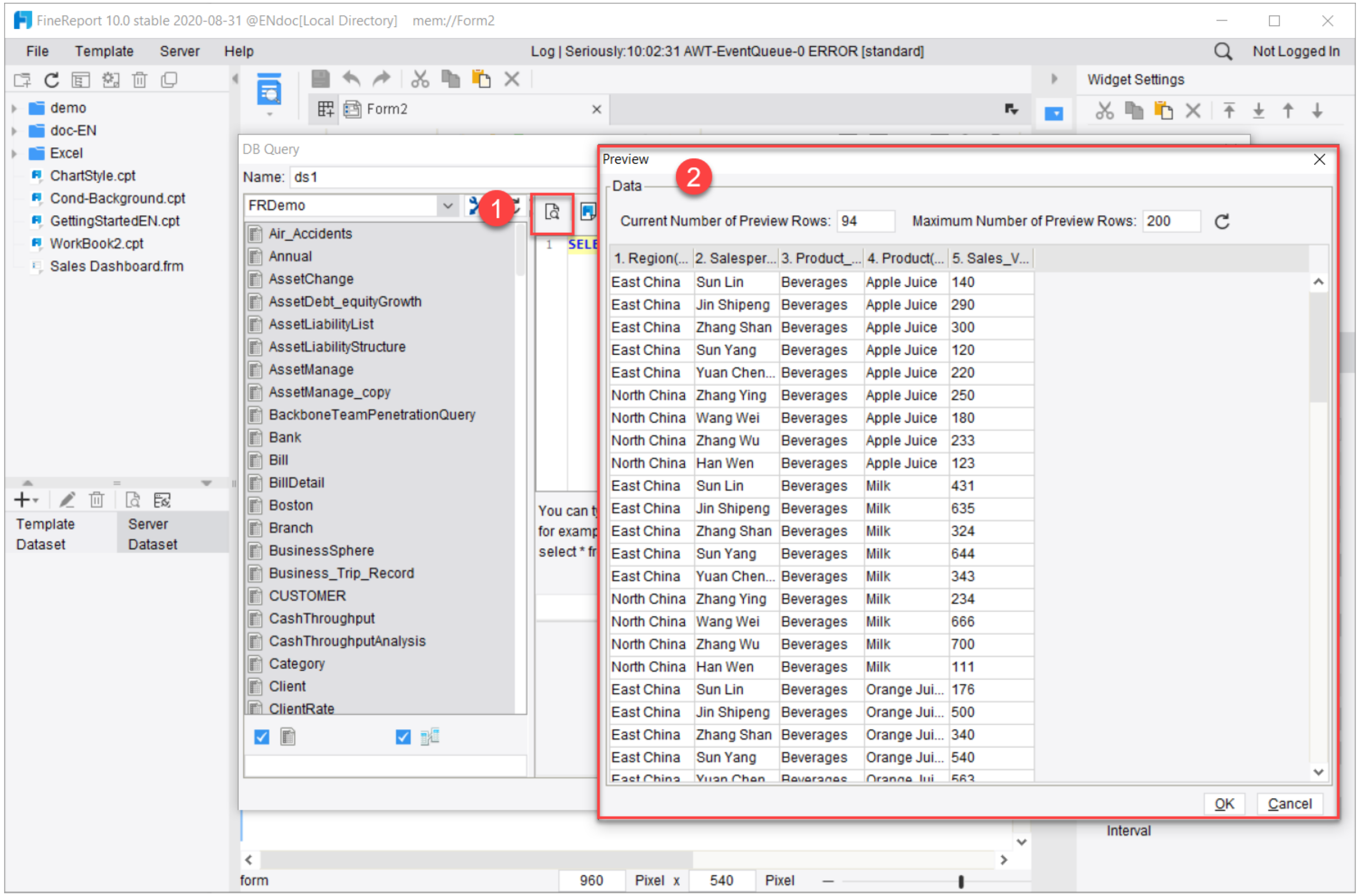
- Look at the dataset section at the bottom left, it's now using template dataset.
- Click **[+]>[DB query].**



- Here we are using FRDemo database that comes with FineReport. Use SQL statements ***SELECT * FROM Sales_Volume*** to query the sales volume data from the database.



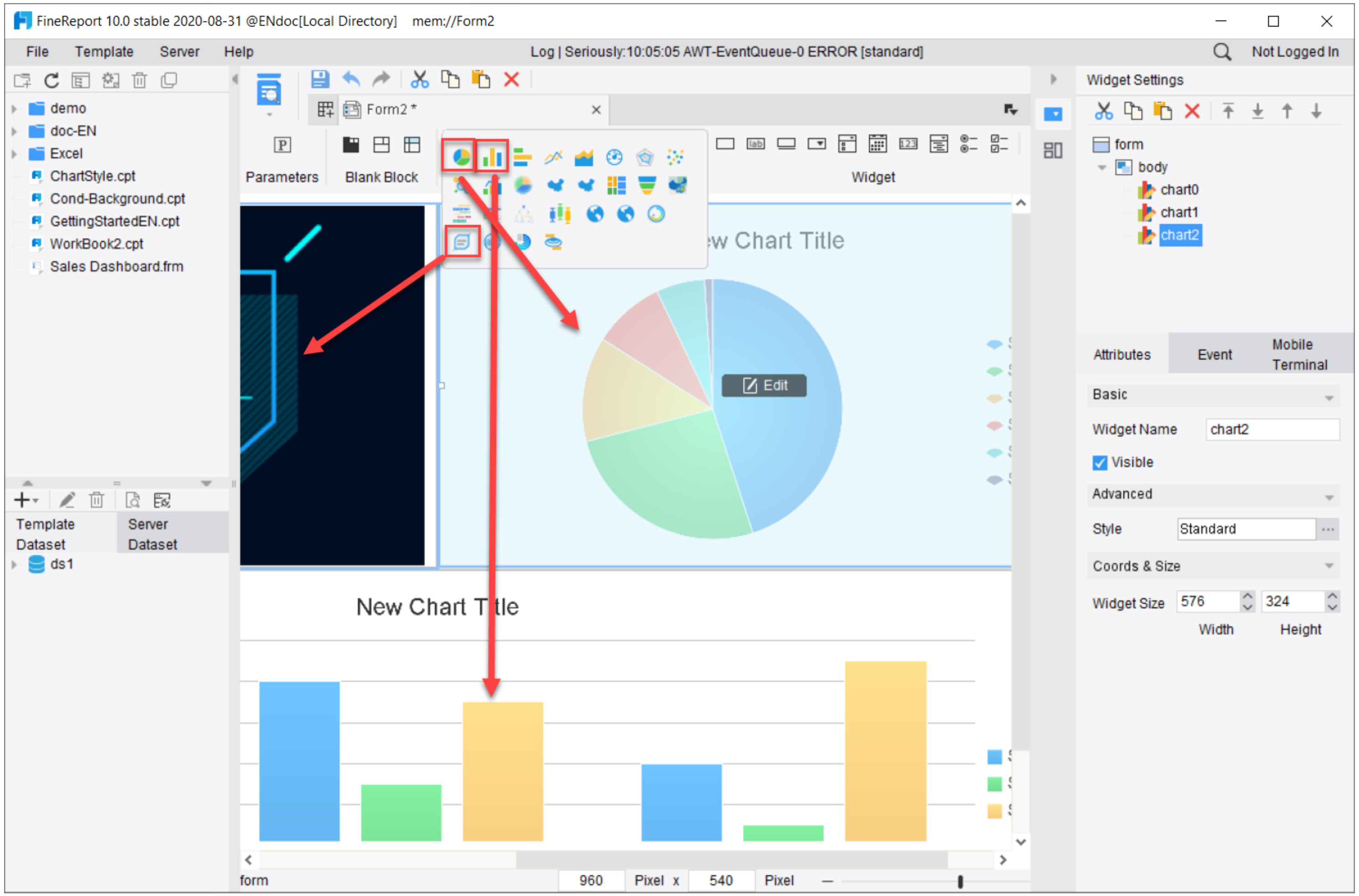
- Click  to view the data we selected.



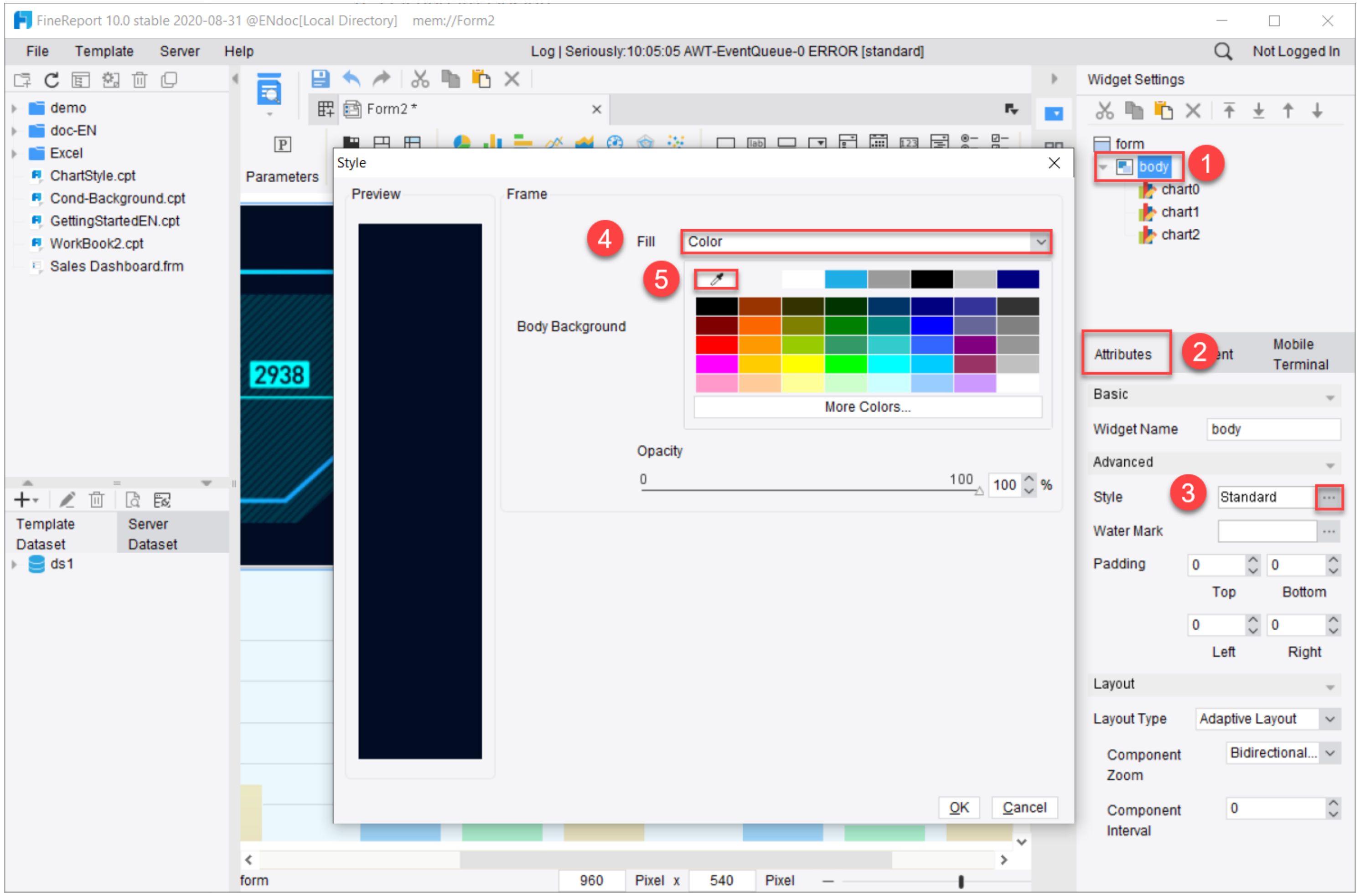
II. Dashboard Design

The new dashboard is a blank canvas. Report design elements, such as charts, widgets, etc., are displayed on the top.

- Let's drag in the column chart, pie chart and KPI indicator that we need. Adjust them to the appropriate size.



- We want to set the report background to the same color as the KPI indicator, click [body], move to [Attributes]>[Advanced]>[Style], set fill as [color] and select the color (dark blue) we want.

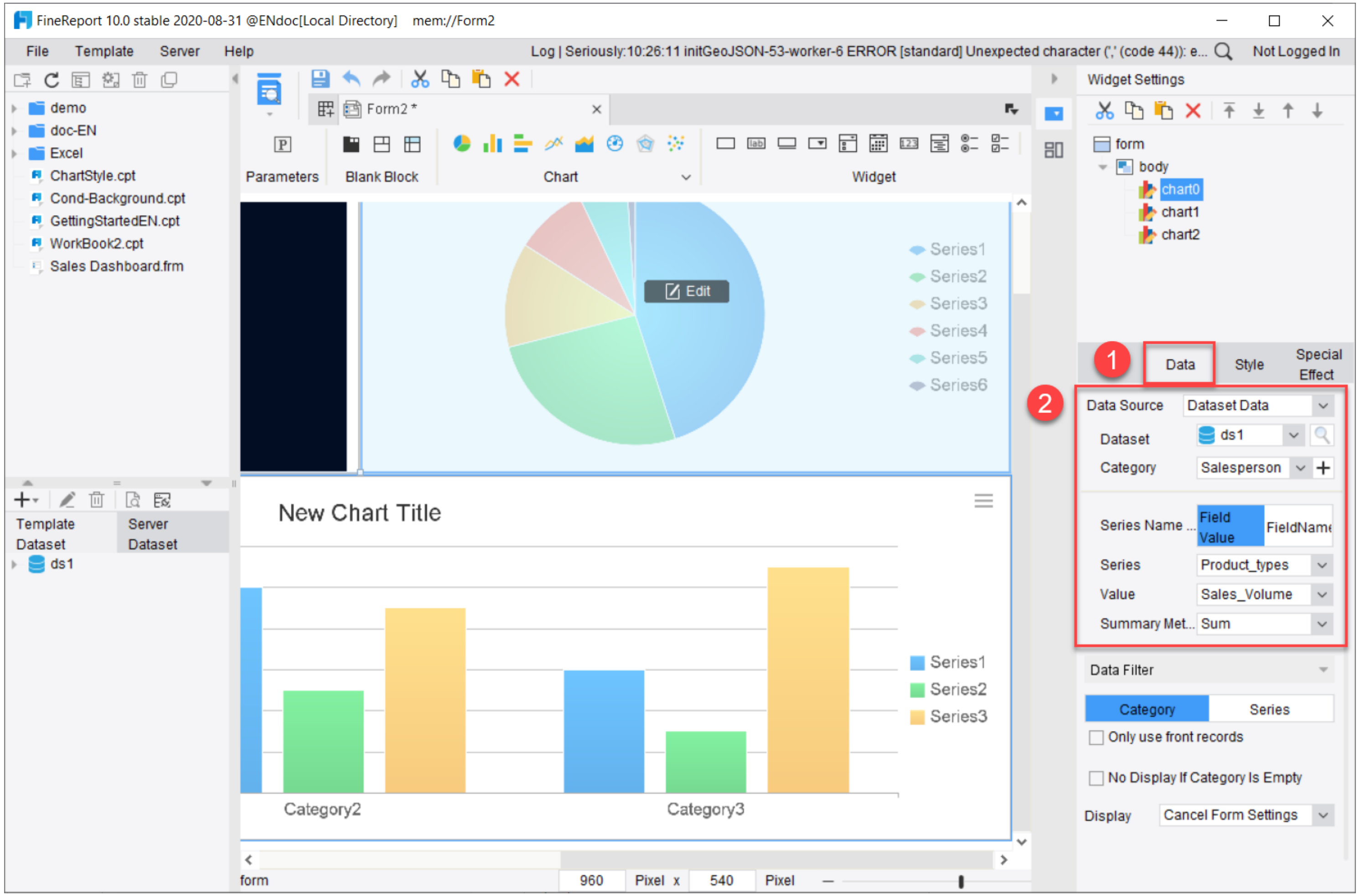


III. Chart Design

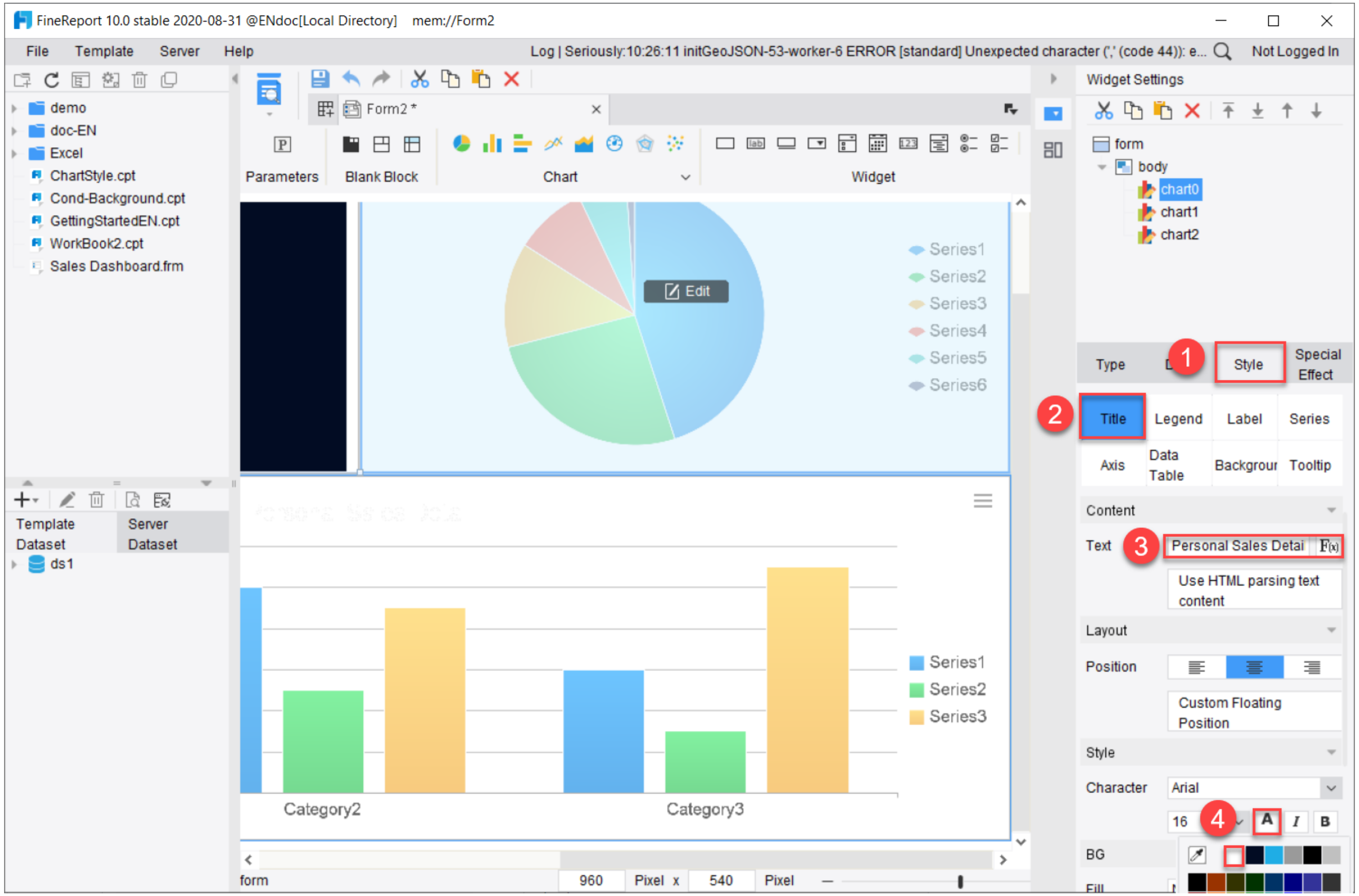
Next let's set up the three charts one by one.

1. Column Chart: Personal Sales on Different Product Types

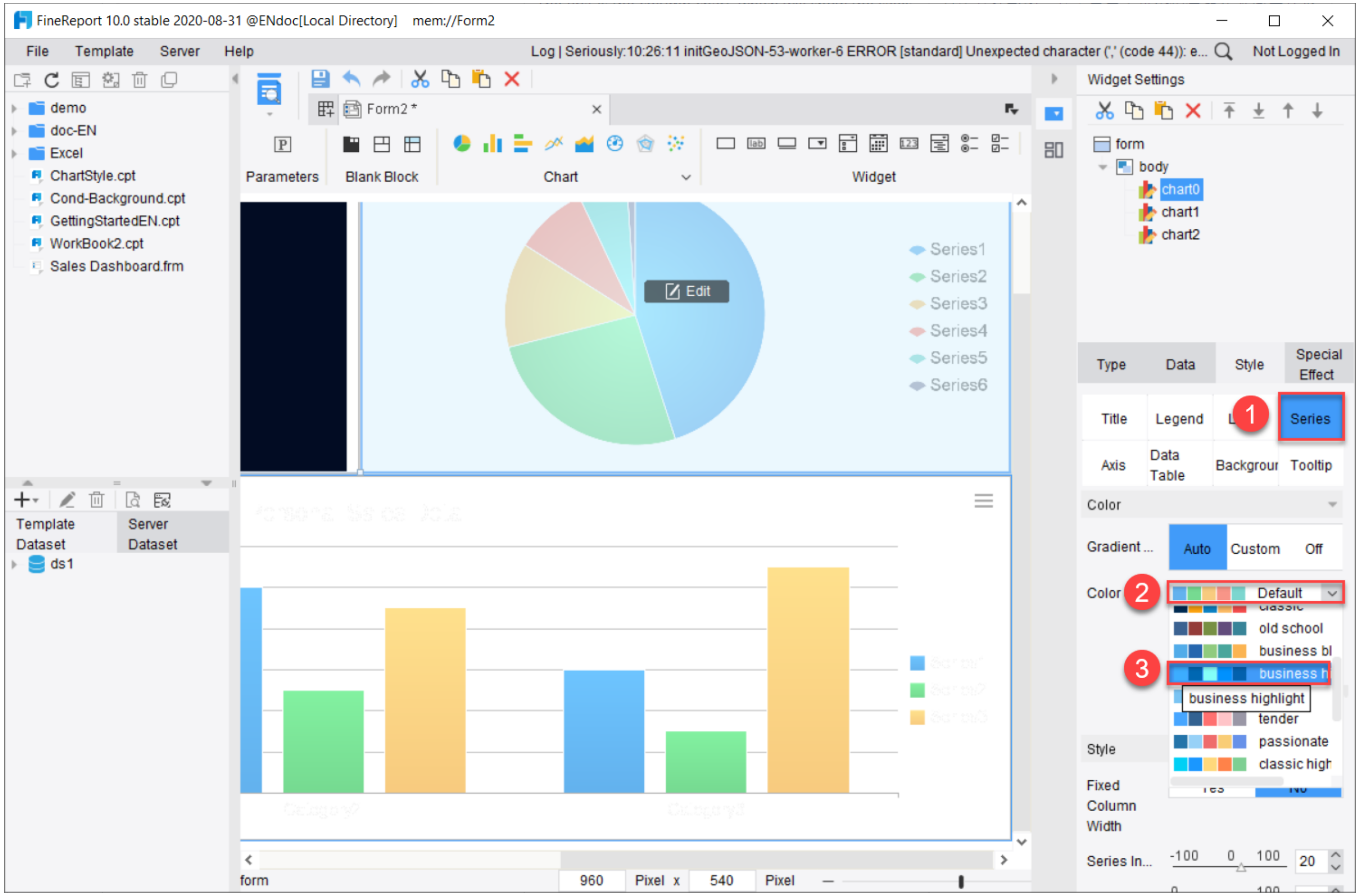
- Double click on column chart.
- To bind the data, please go to [Data] tab on the right. Settings are as follow:



- Go to [Style] tab, and click [Title]. Enter the title text [Personal Sales Detail], and set the color to white to look good on the dark blue background.

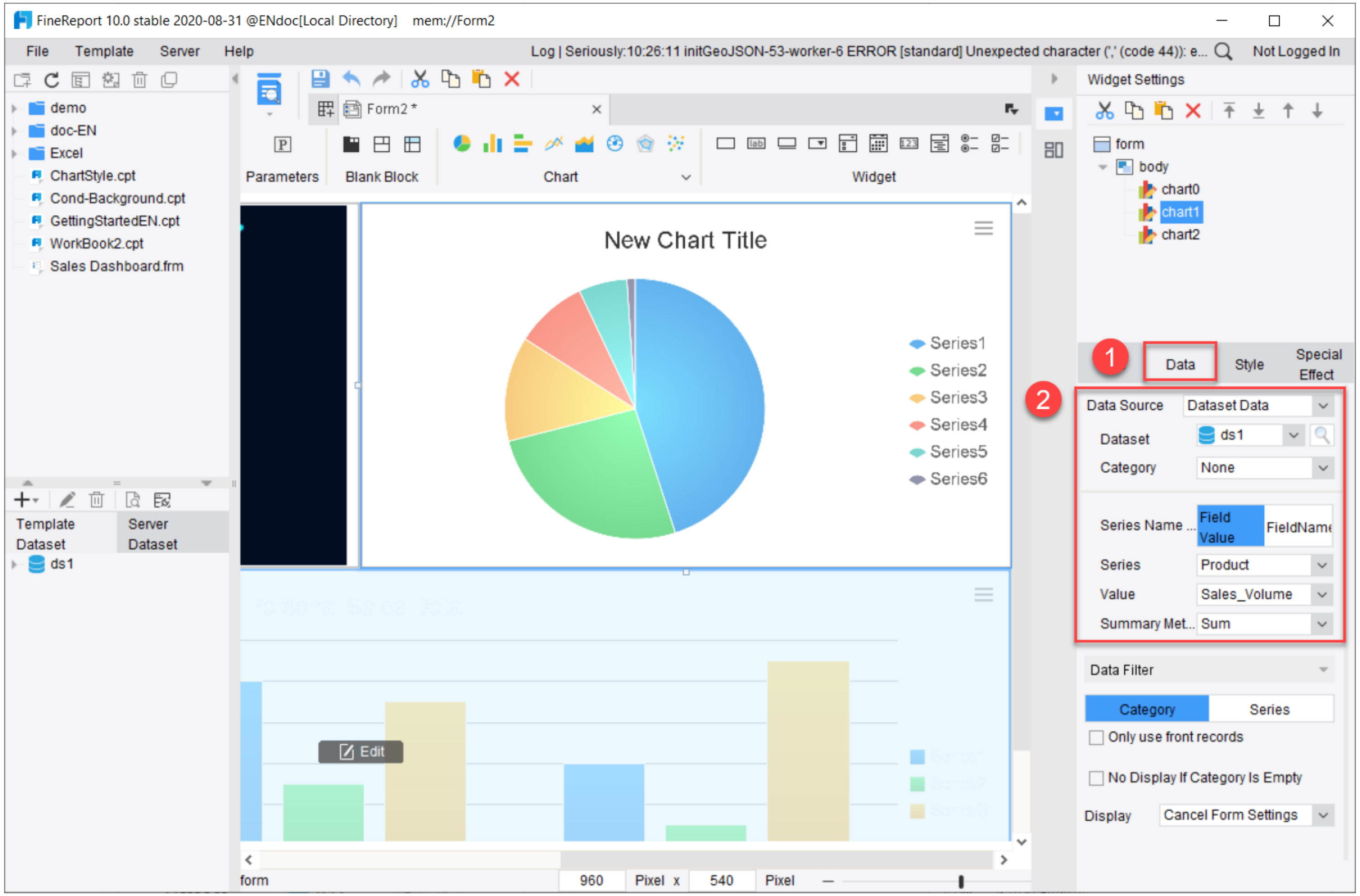


- Also set the text in [Legend] and [Axis]>[x axis]&[y axis] to white color.
- Go to [Series] tab, and change the chart series style to [Business Highlight]

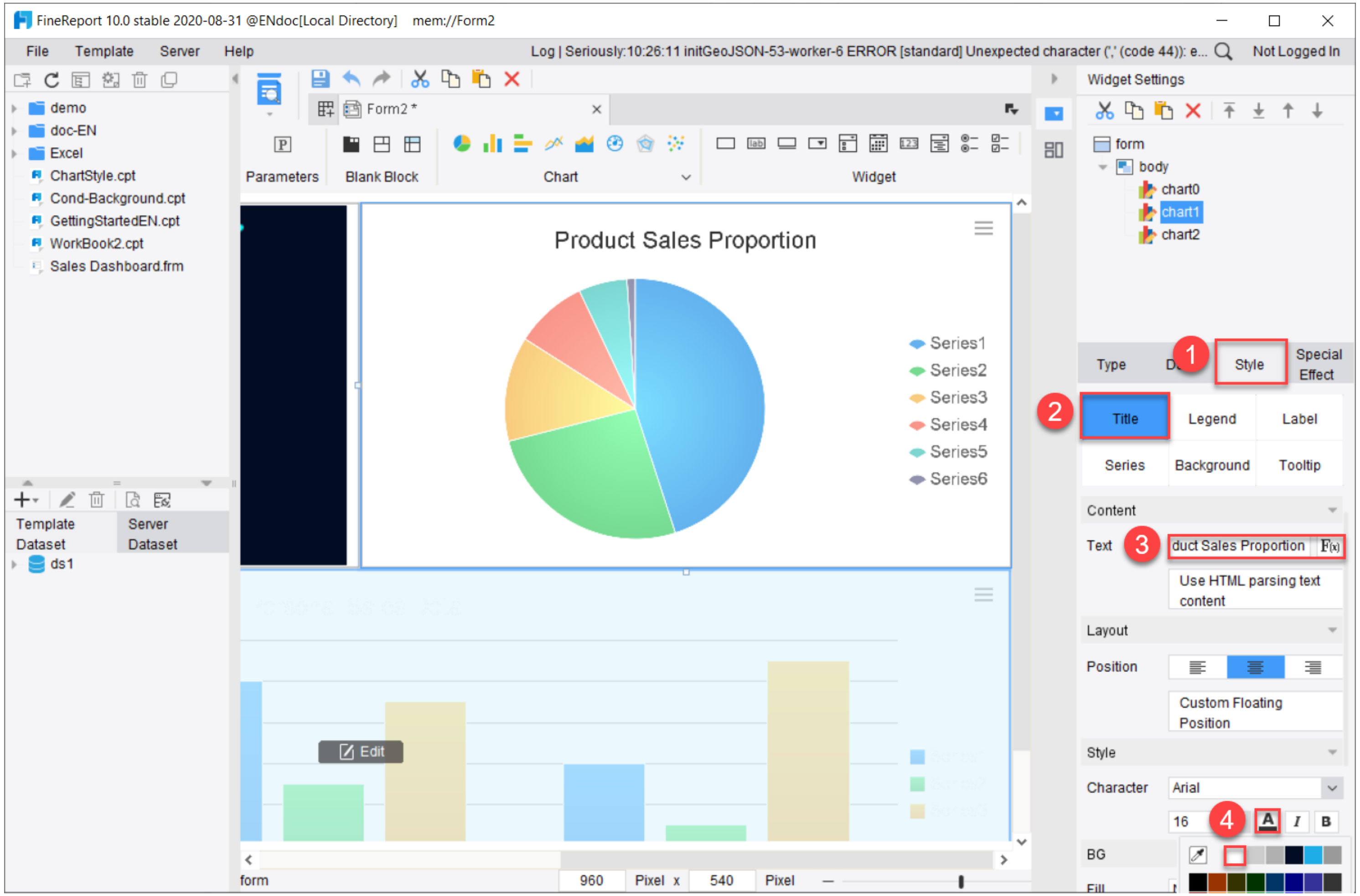


2. Pie Chart: Sales Percentage of Different Product

- Double click on pie chart.
- To bind the data, please go to [Data] tab on the right. Settings are as follow:



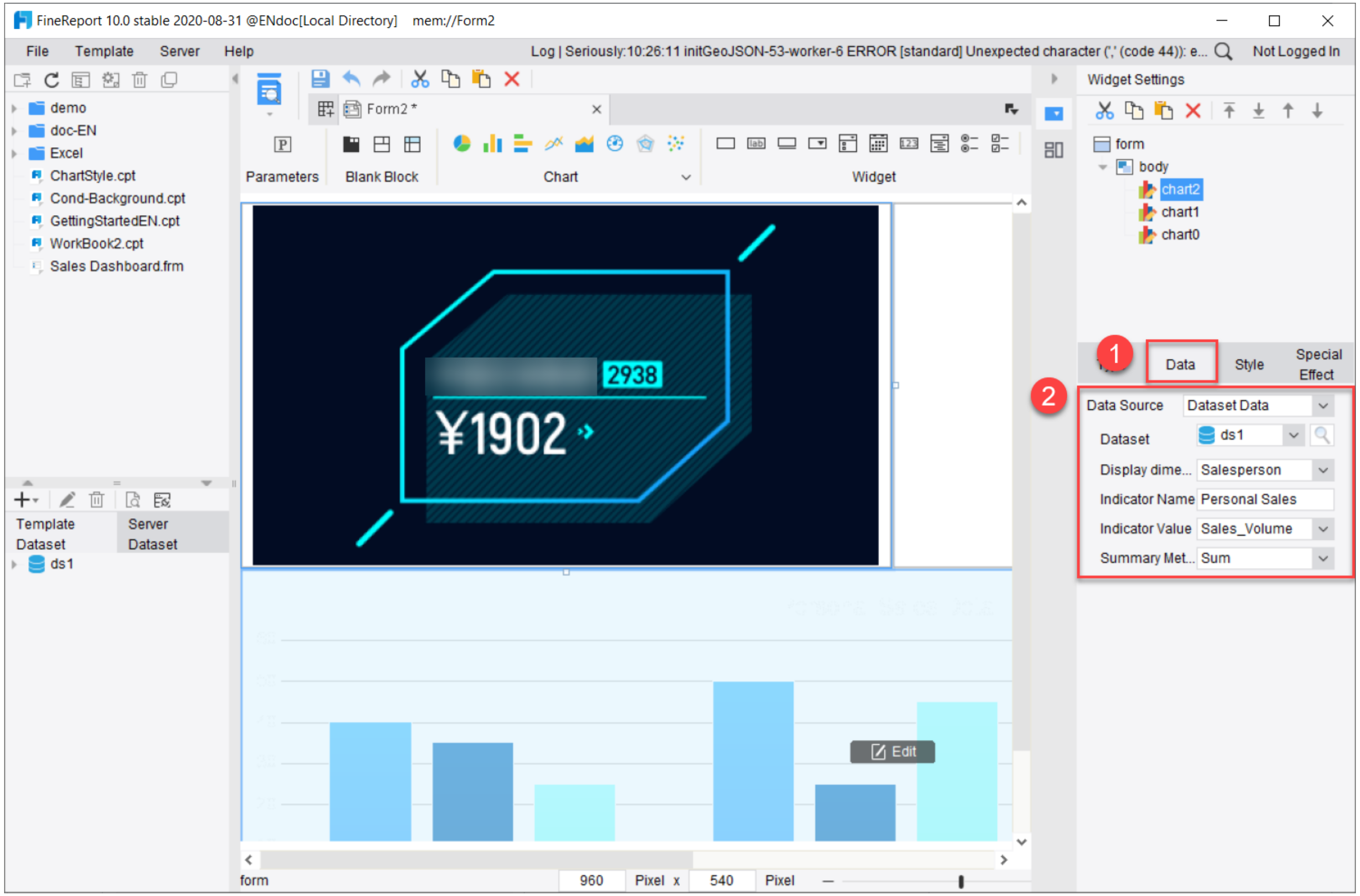
- Go to [Style] tab, and click [Title]. Enter the title text [Product Sales Proportion], and set the color to white.



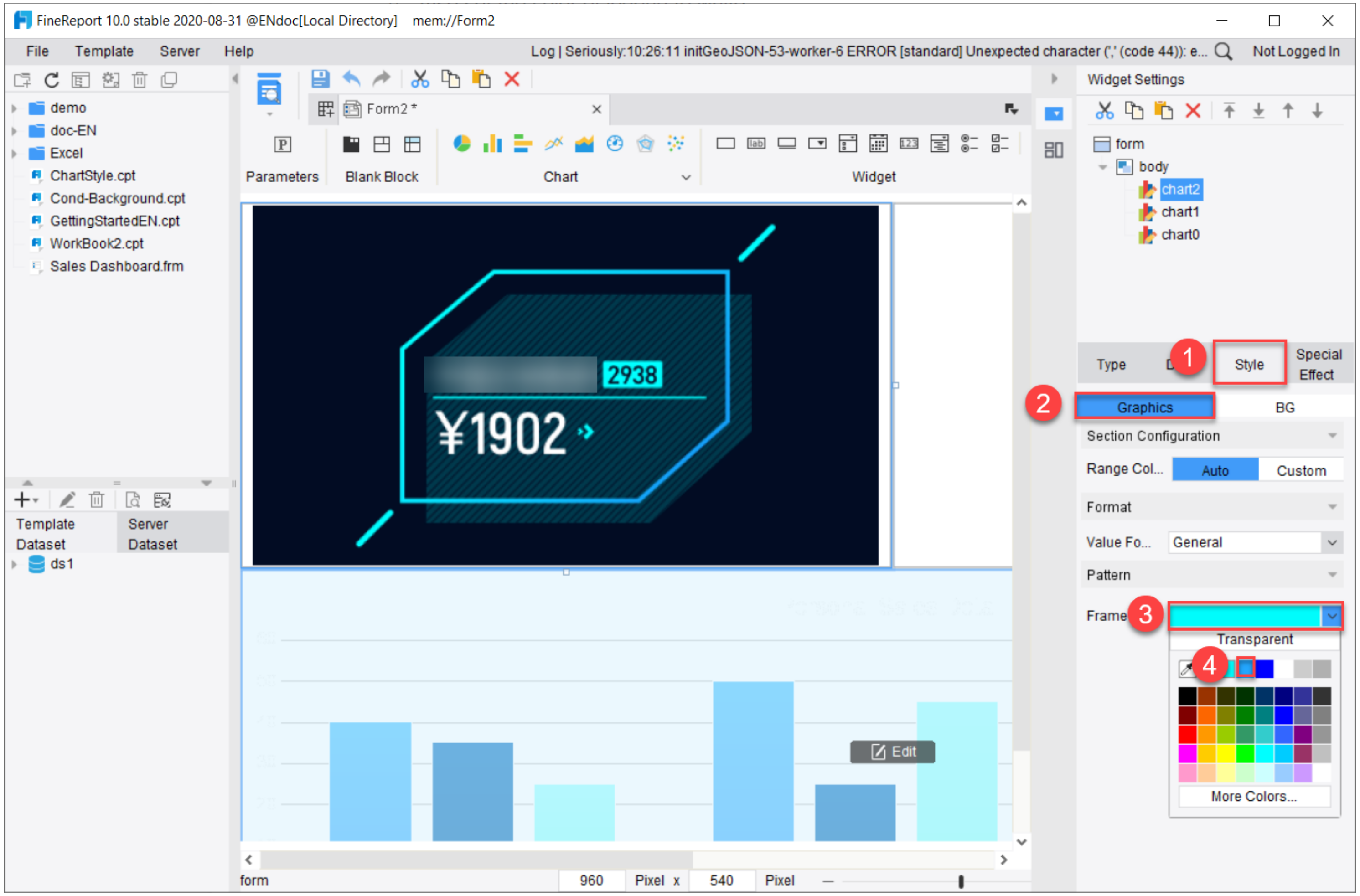
- Also set the color of legend to white.
- Go to [Series] tab, and change the chart series style to [Business Highlight]

3. KPI Indicator: Personal Sales Summary

- Double click on KPI Indicator.
- To bind the data, please go to [Data] tab on the right. Settings are as follow:



- Go to [Style]>[Graphics], set the frame color to business blue.

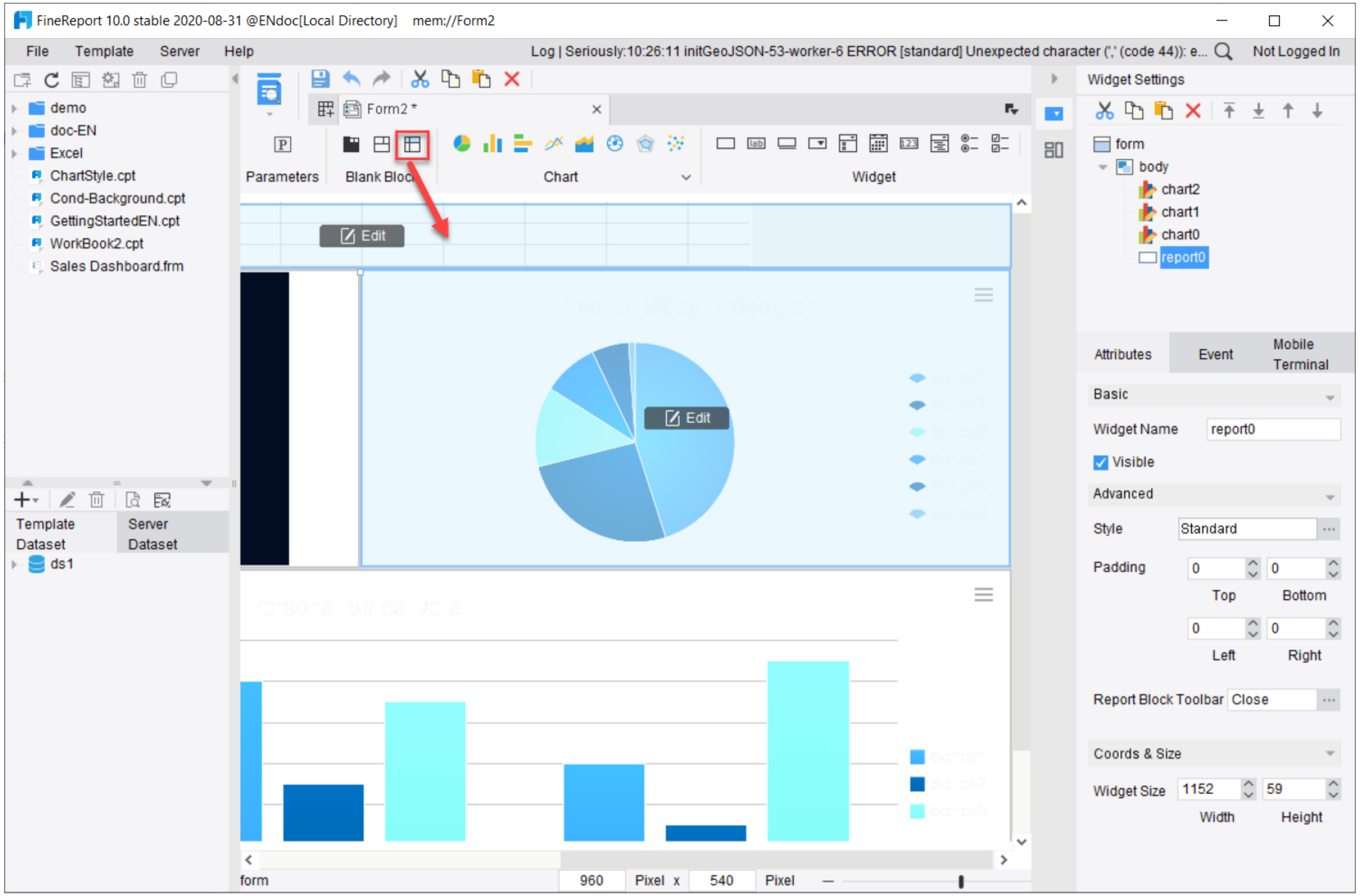


IV. Title Block

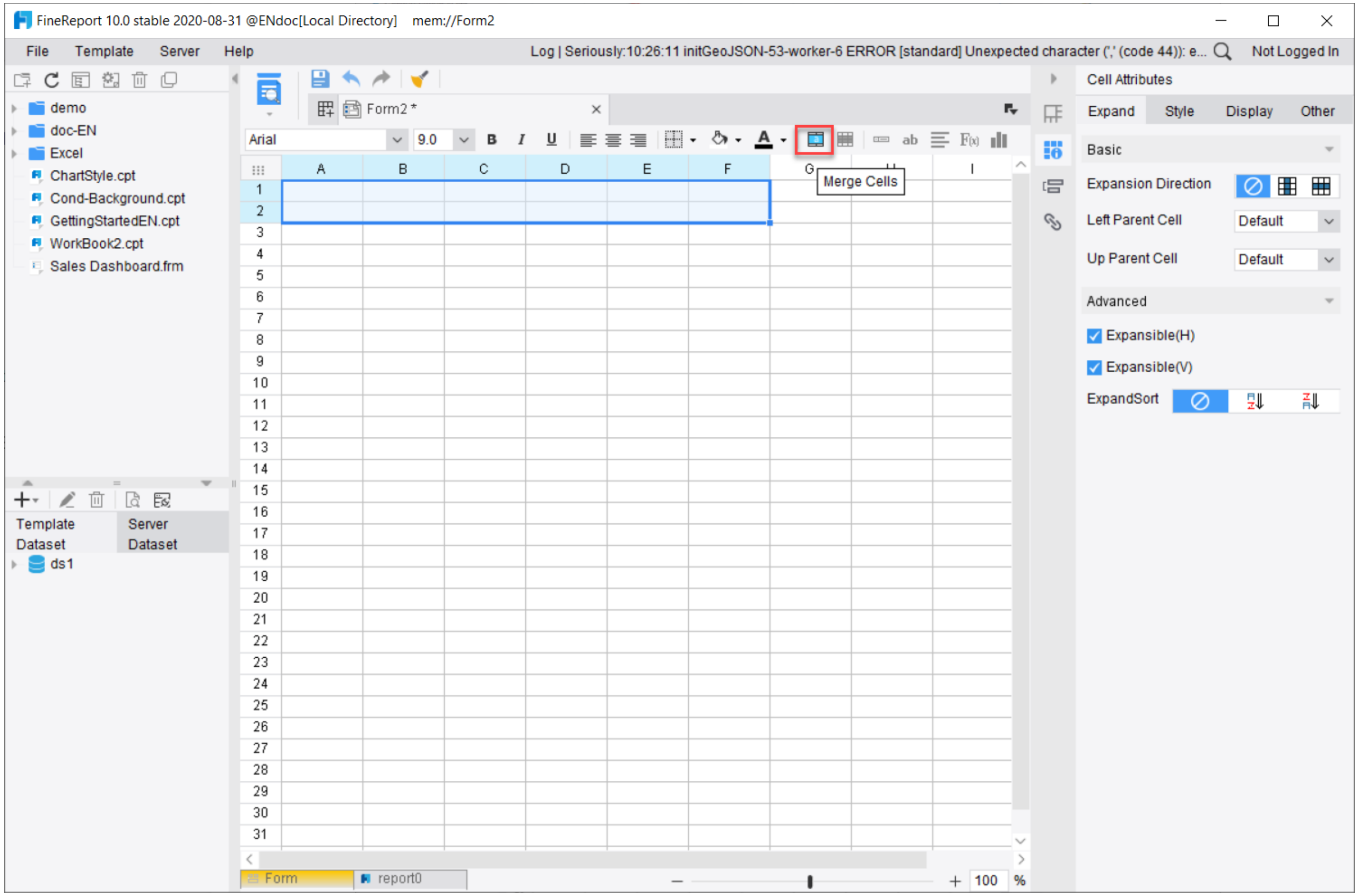
Finally, let's design the title of the dashboard. And make it jump to another report after click.

1. Report Block and its Design

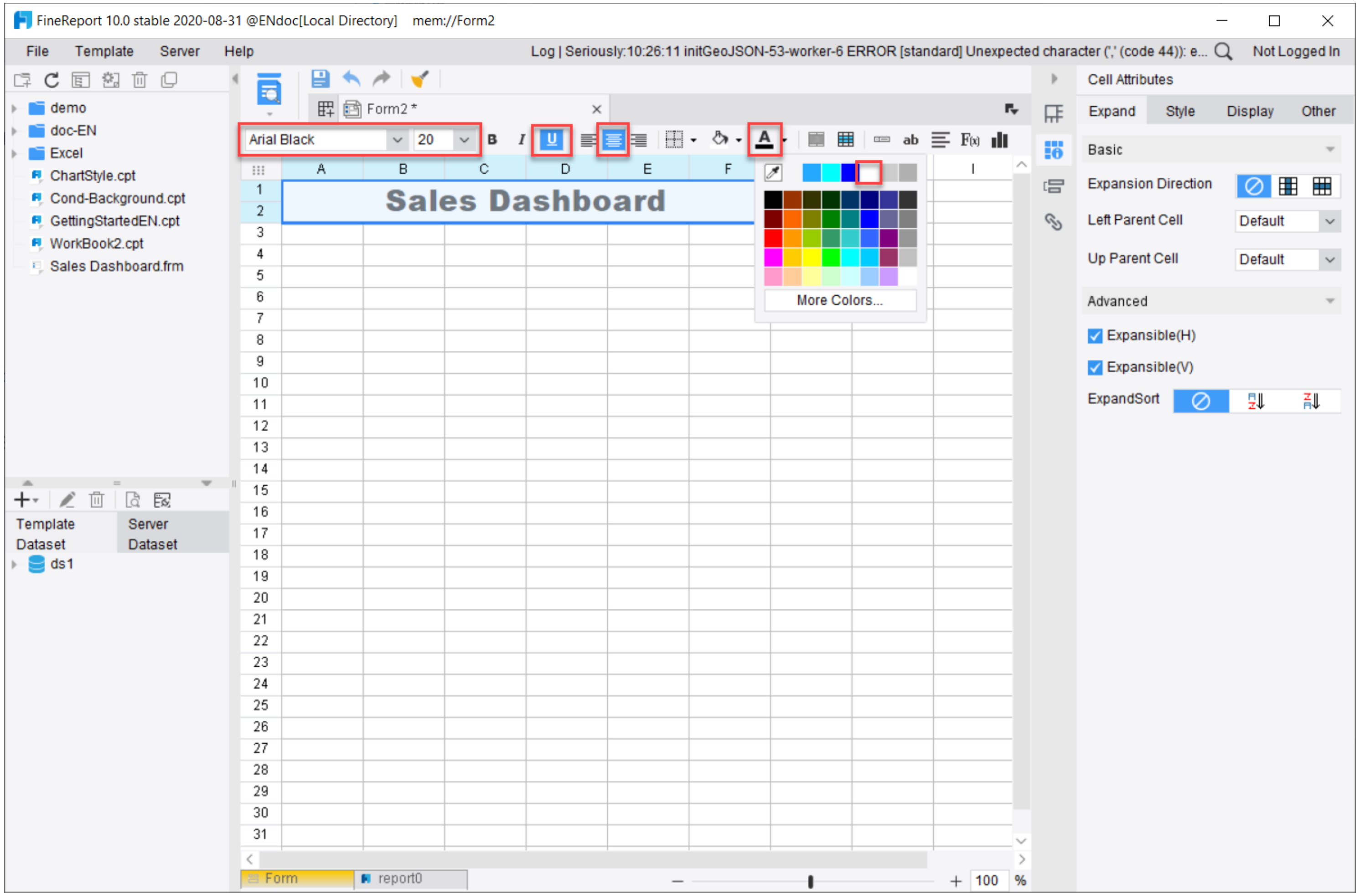
- Drag in the report block and adjust the size.



- Double click the report block to edit.
- Merge cell A1~F2.

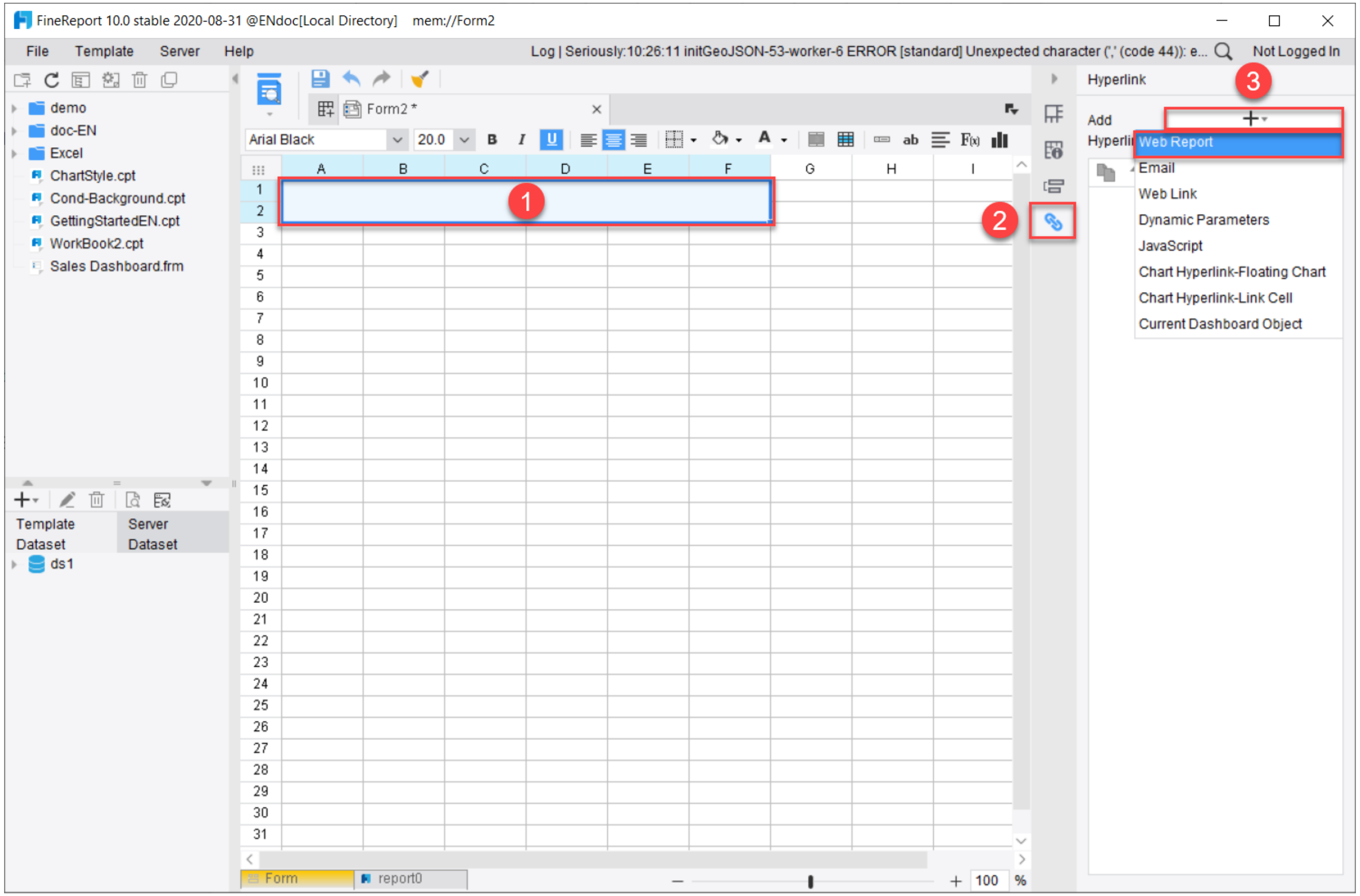


- Enter the title [Sales Dashboard] and adjust the format as follows:

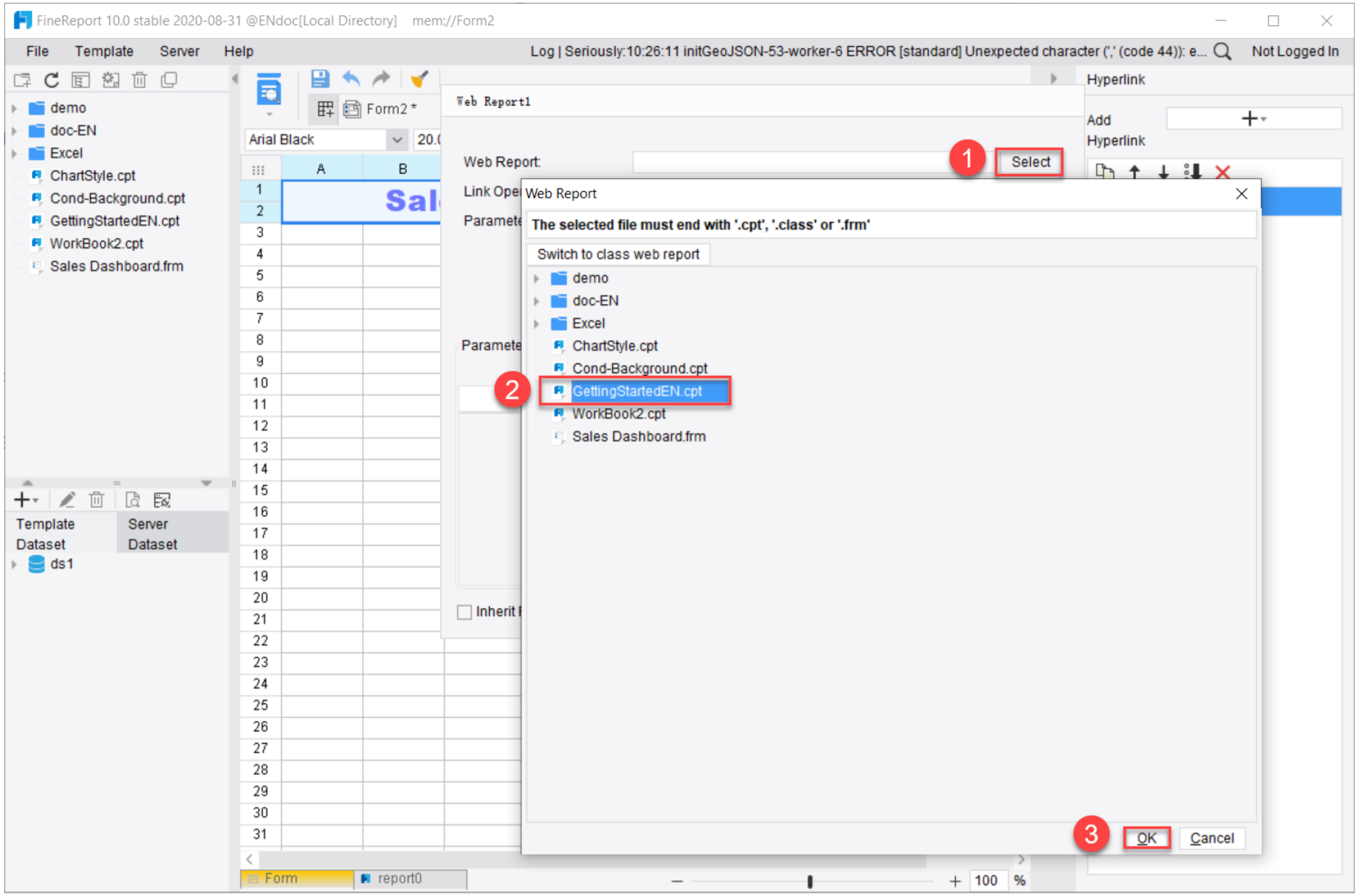


2. Hyperlink

- Click on the cell. Go to [Hyperlink], click [+]>[WebReport].

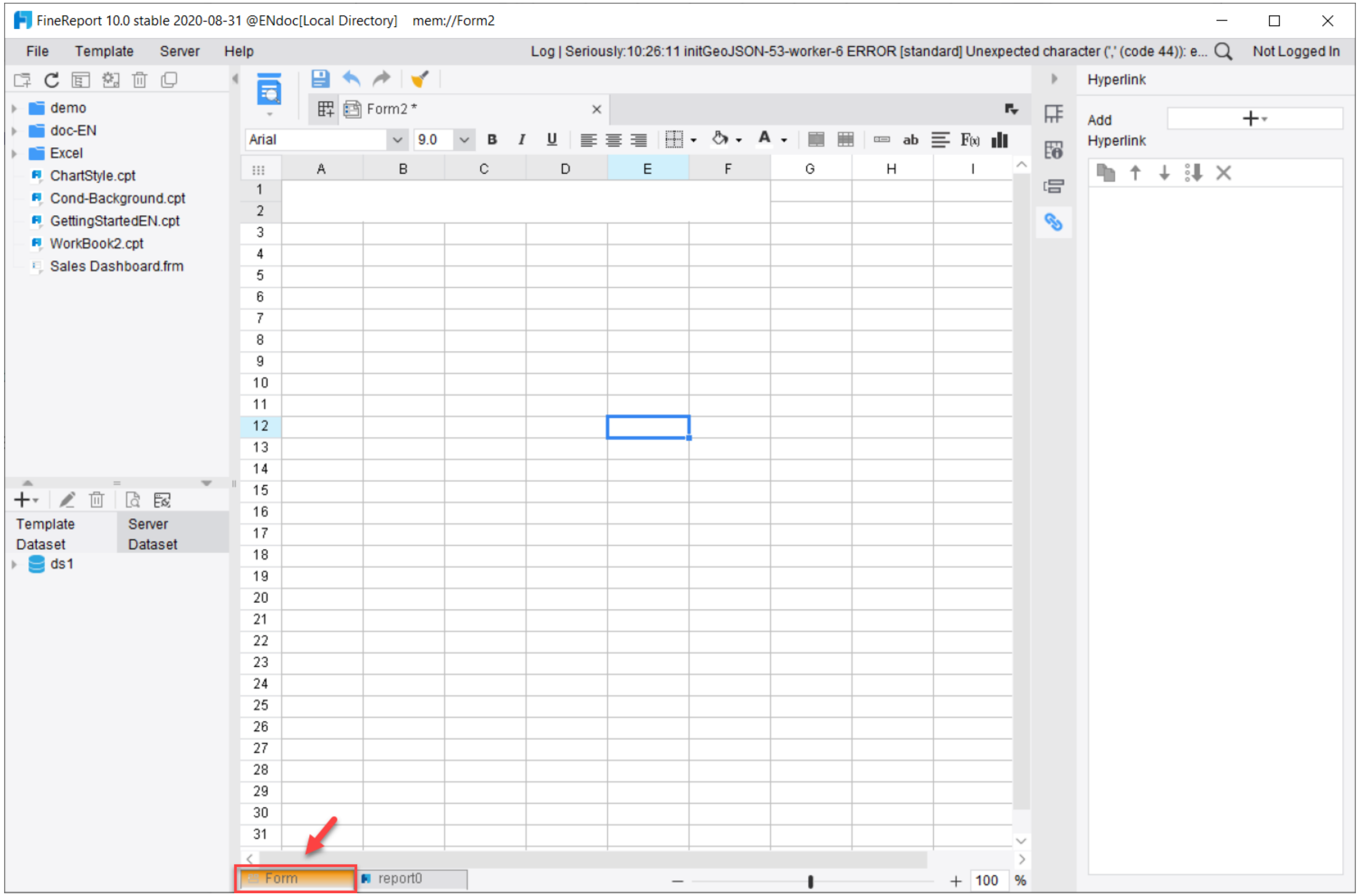


- Select GettingStartedEN.cpt to be the target report.

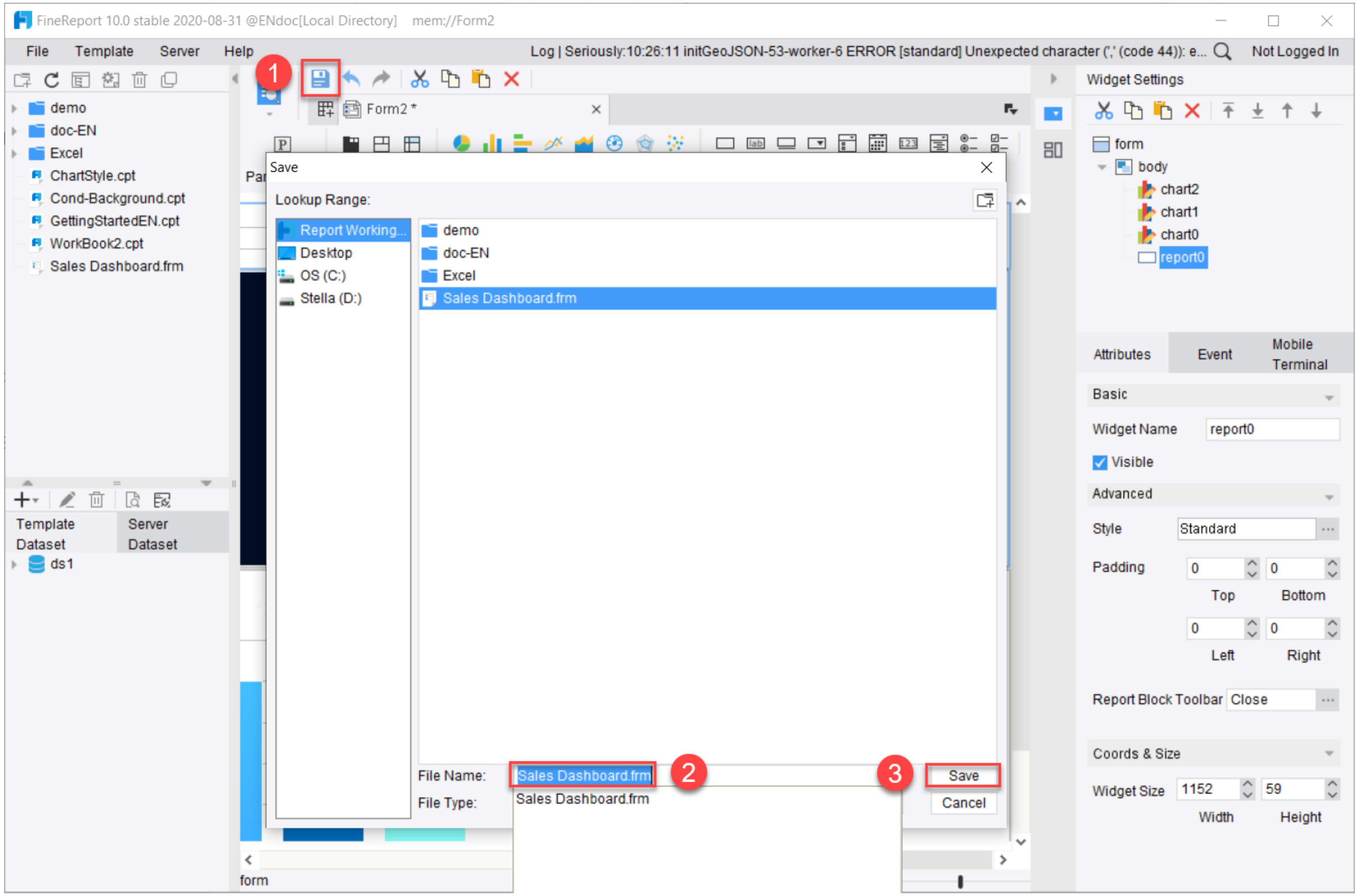


V. Save and Preview

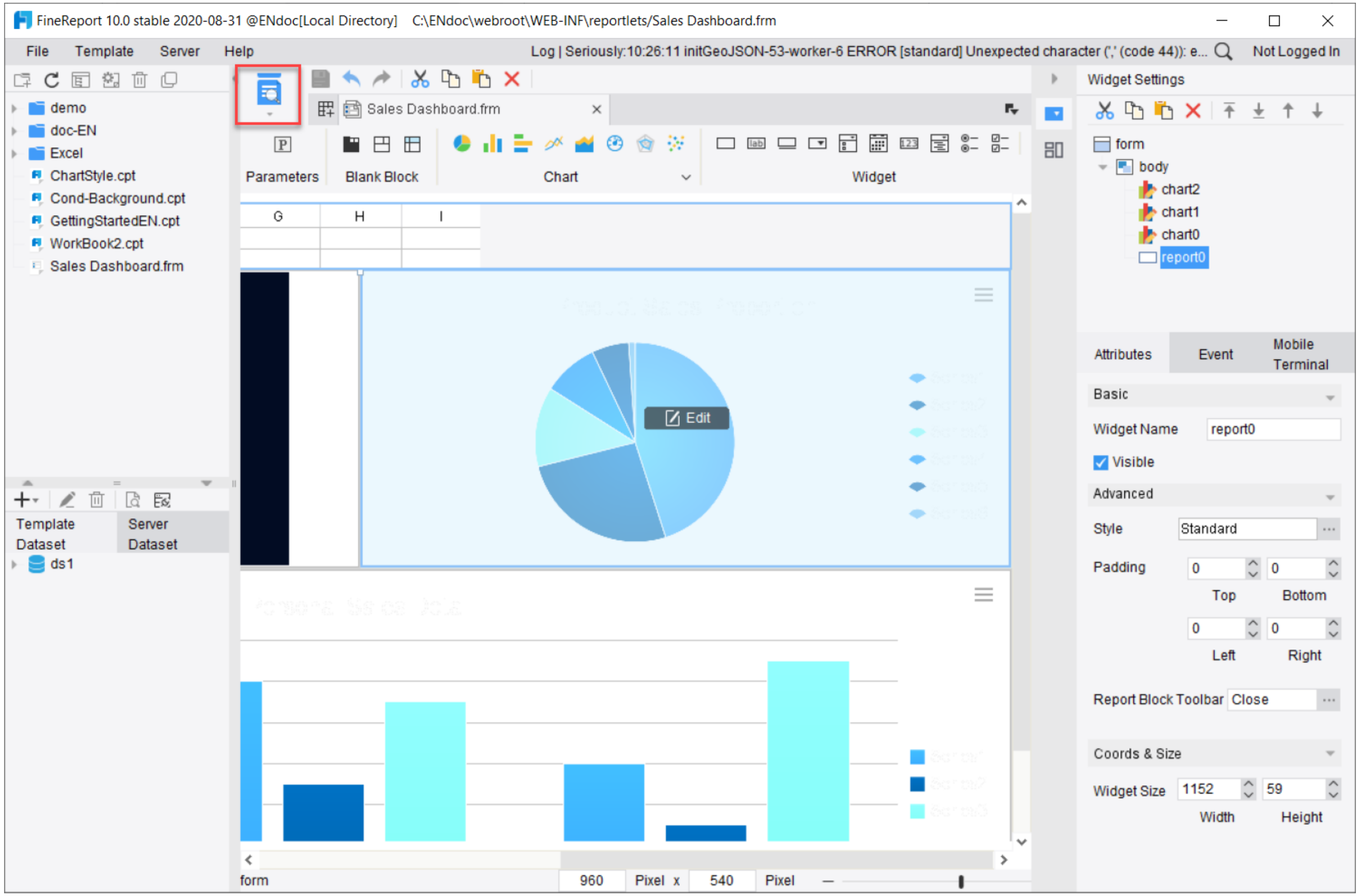
- Click on the [form] tab at the bottom left to go back to the canvas.

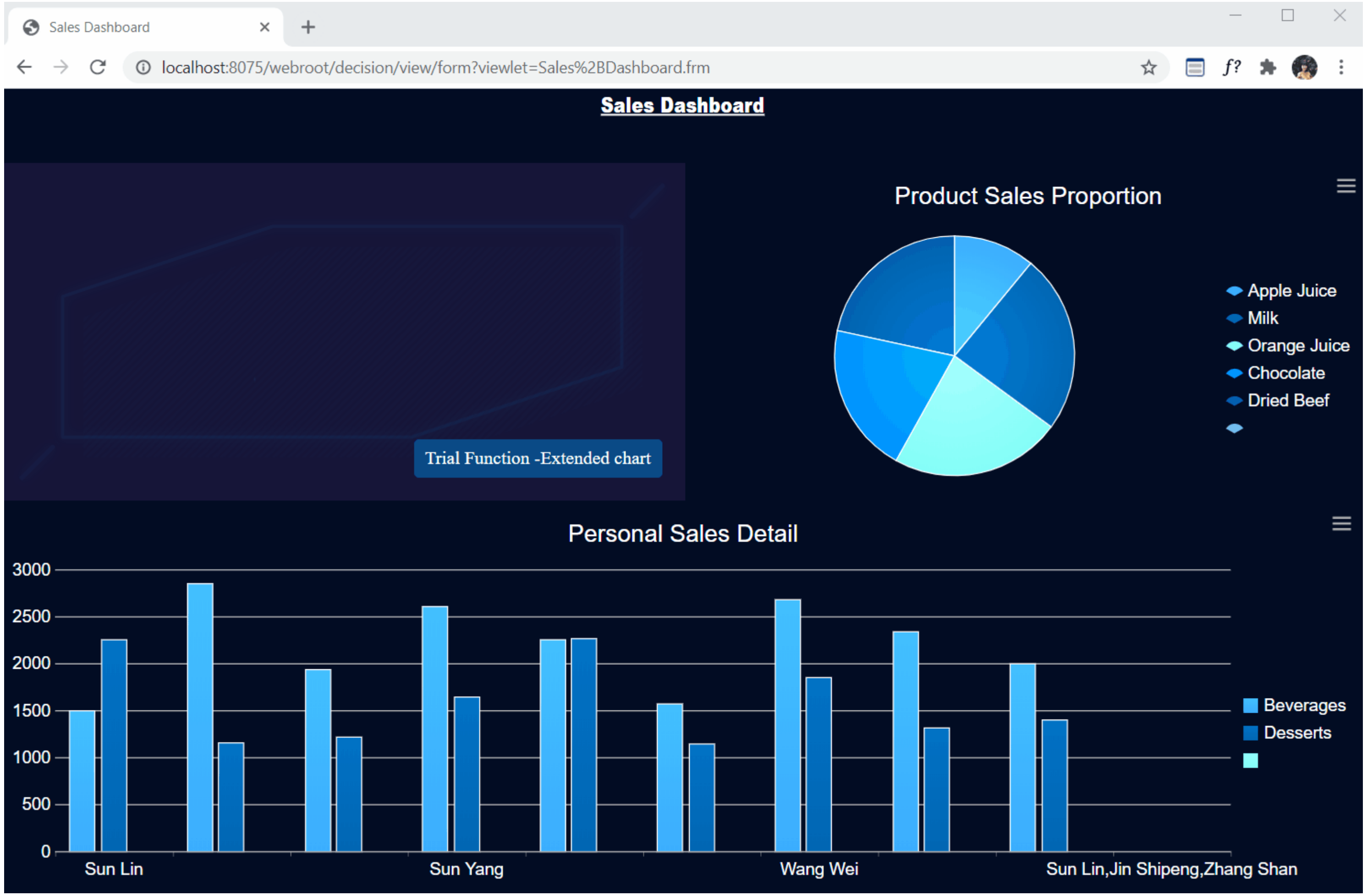


- Click [Save] and save it as Sales Dashboard.frm



- Click [Preview] to preview the final dashboard.




Sales Dashboard
localhost:8075/webroot/decision/view/form?viewlet=Sales%2BDashboard.frm
Sales Dashboard
Trial Function -Extended chart
Product Sales Proportion
Apple Juice
Milk
Orange Juice
Chocolate
Dried Beef
Personal Sales Detail
3000
2500
2000
1500
1000
500
0
Sun Lin
Sun Yang
Wang Wei
Sun Lin,Jin Shipeng,Zhang Shan
Beverages
Desserts