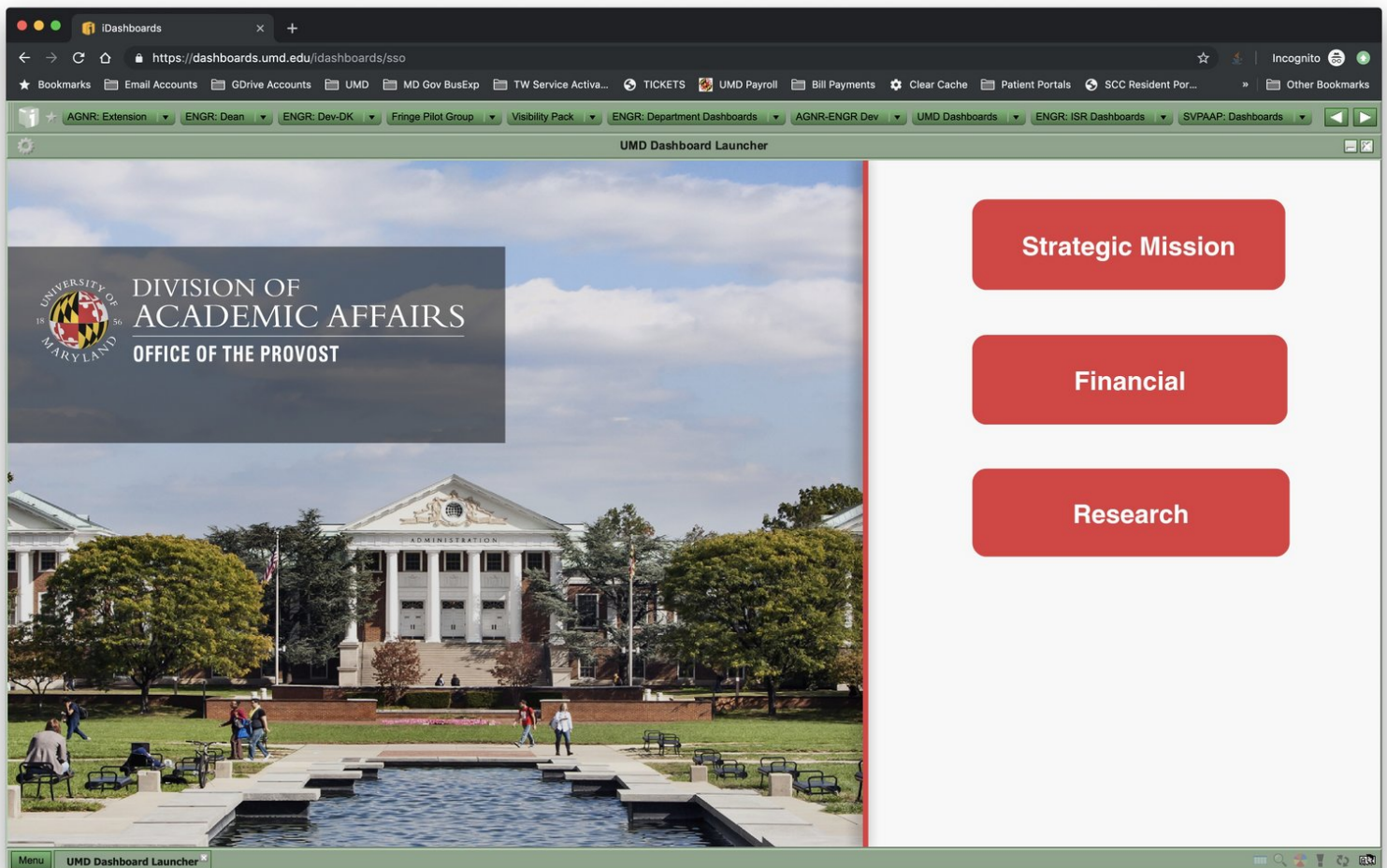




# Basic navigation in UMDashboards

This guide will go over the general hierarchy and layout of UMDashboards in order to help you navigate between the platform.

Written By: Nicholas Bentley

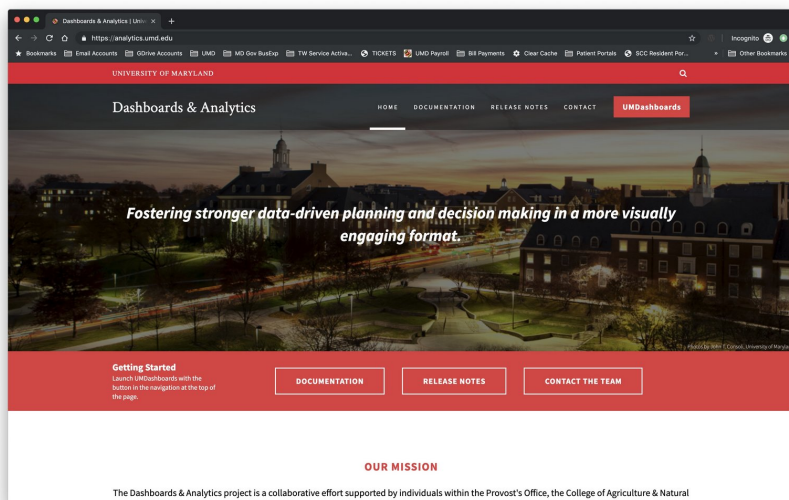


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## **TOOLS:**

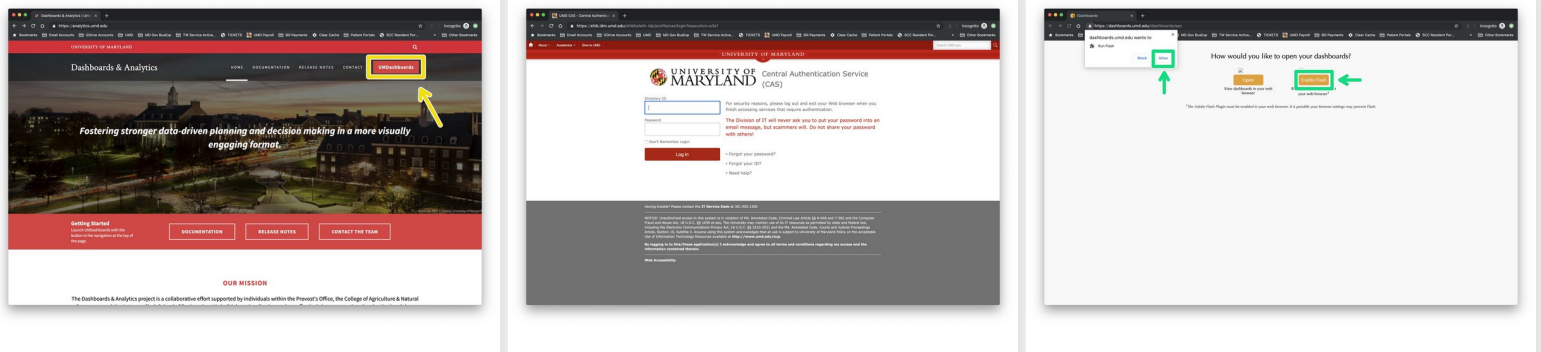
- [Desktop / Laptop Computer](#) (1)
- Windows or MacOS
-

## Step 1 — Browse to the Dashboards & Analytics website



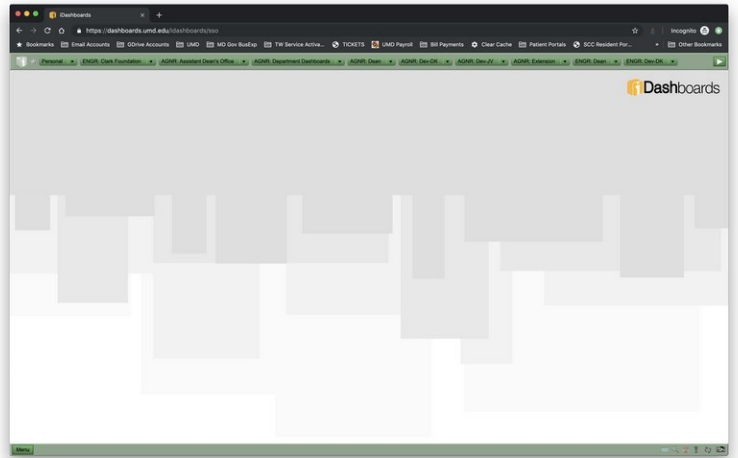
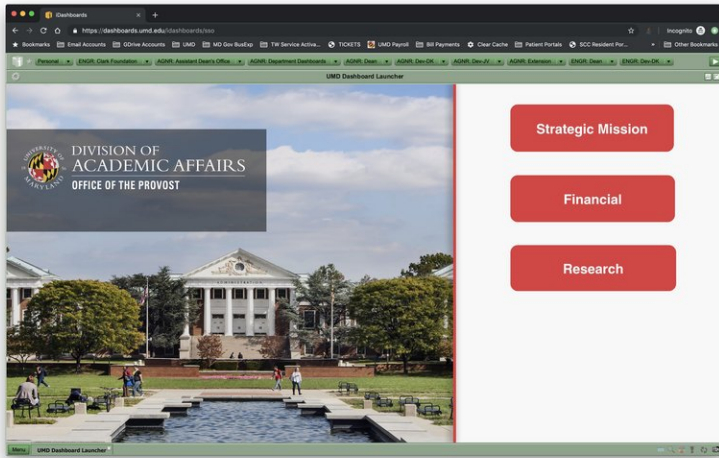
- Open your browser and browse to <https://analytics.umd.edu>
- ❗ UMDashboards is best viewed in the Google Chrome browser.

## Step 2 — Log in to UMDashboards



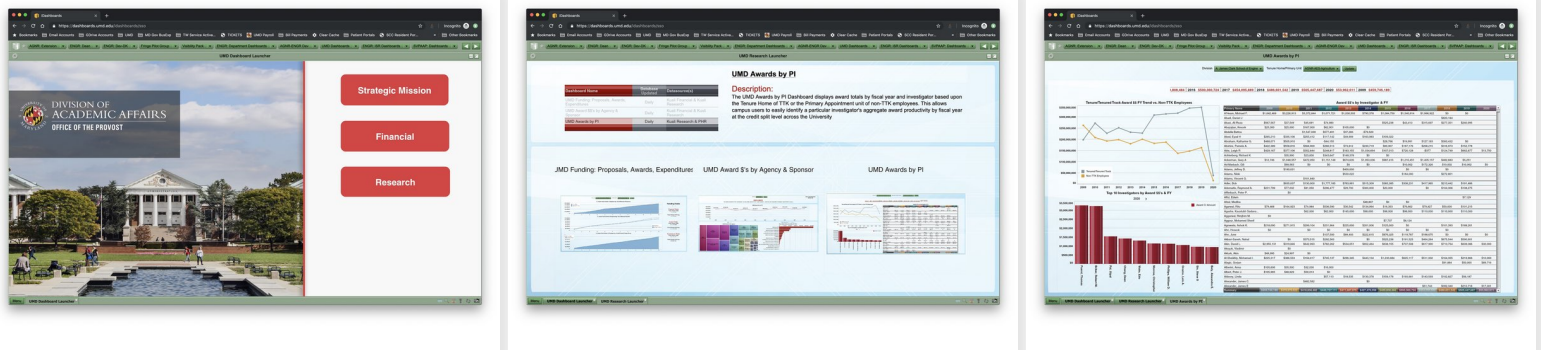
- Click the red UMDashboards button in the header of our website to open UMDashboards.
- You will be redirected to CAS. Log in & complete your Duo push to continue.
- After you authenticate through CAS, you may be presented with an interstitial page asking whether you want to view dashboards in HTML or Flash.
  - Choose **Enable Flash** to continue.
  - Choose **Allow** in the following prompt that appears in the top left.
- You will now be logged in to UMDashboards. Depending on your settings, you will see one of two landing screens.

## Step 3 — You are now logged in to UMDashboards



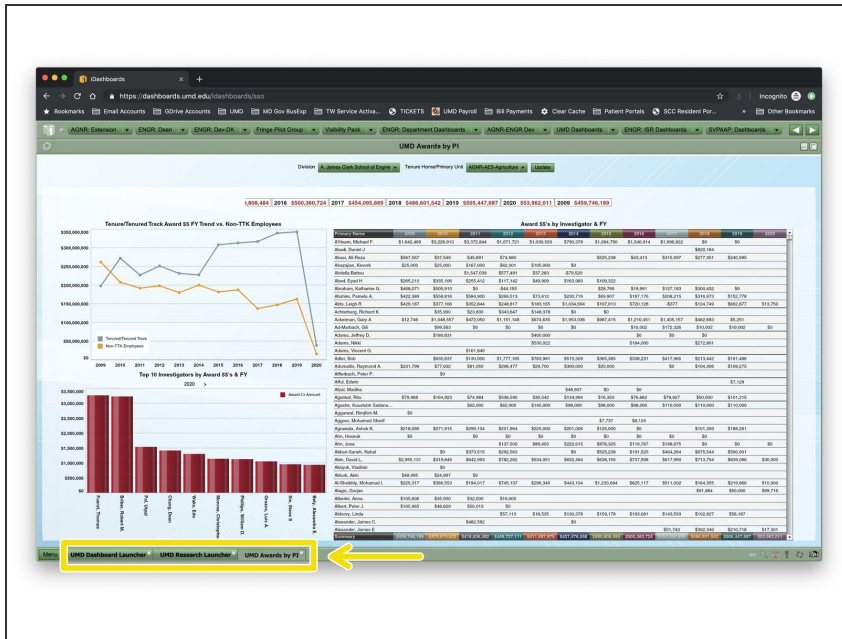
- Depending on your settings, you will either see:
  - 1. The **Startup Dashboard** you have configured in your user settings or that has been assigned to your user profile by a member of our team.
  - 2. The **default iDashboards** landing screen (which is blank).

## Step 4 — Launchers, sub-launchers, and dashboards



- UMDashboards is set up using a system of **launchers** and **sub-launchers**.
  - **Launchers** exist at the root level of a dashboard category, as in the first picture.
  - **Sub-launchers** exist one or more below the launcher level, as in the second picture.
  - **Dashboards** (where the data lives) exist below the sub-launcher level, as in the third picture.
- i** To get to a dashboard, you navigate using a drill-down approach from **launcher** to **sub-launcher** to **dashboard**.

## Step 5 — Going back to the previous launcher, sub-launcher, or dashboard



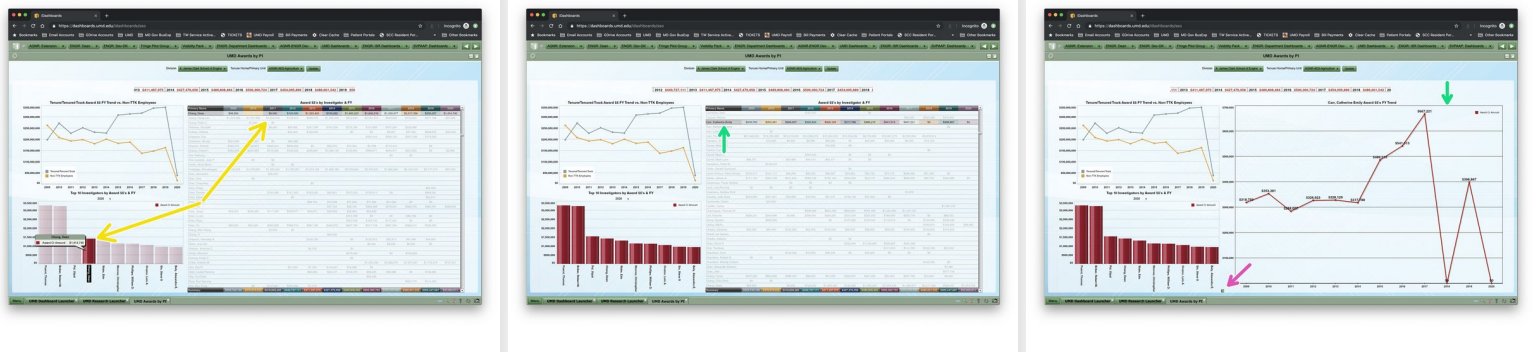
**⚠ When attempting to go back to the previous launcher, sub-launcher, or dashboard, **never** use your browser's back button.**

Instead, click on the tabs located at the bottom of the screen to visit the previous screen you were on.

**📌 Pro tip:** these tabs are similar to windows on your computer. iDashboards opens a new tab for each dashboard you visit. You can jump between any of your previous dashboards at any time.



## Step 6 — Interacting with data on a dashboard

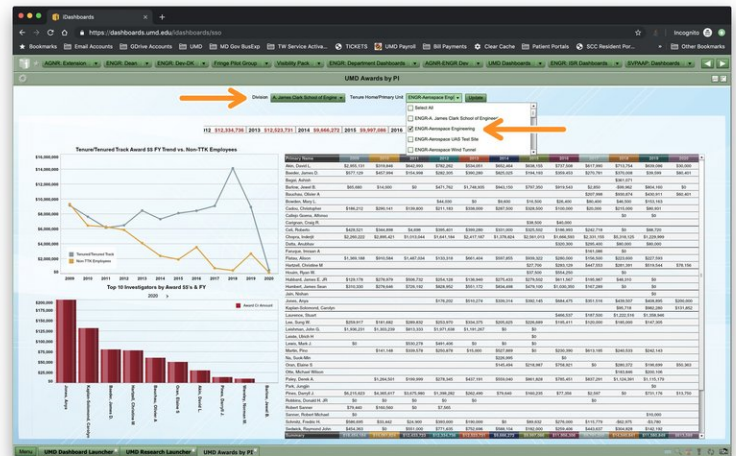
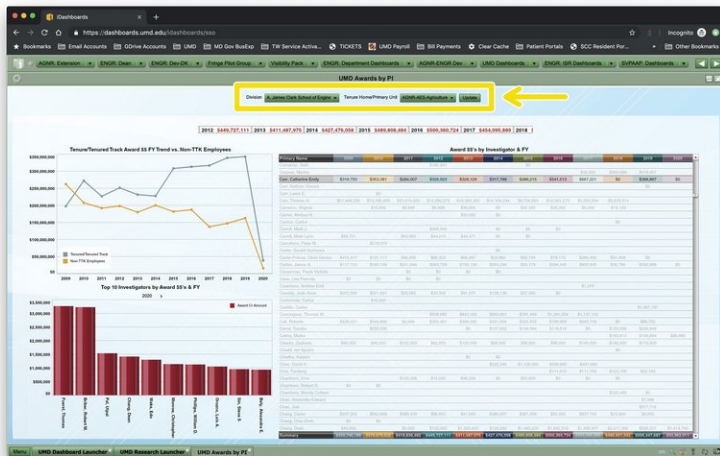


**Pro tip:** most, if not all of our dashboards are interactive. We encourage you to click around and explore.

- Hover your mouse over various parts of a chart to determine interactivity.
  - Some charts will include **interactive intelligence** and highlight parts of another chart when you hover, as in the first picture.
  - Some charts allow you to **drill-down** into further details about a specific data point.
  - **Drill-down** functionality is available when your cursor changes to a hand pointer when hovering over a chart.
  - Simply click to **drill-down**. The second picture shows the record to be drilled and the third picture shows the resulting chart after **drill-down**.
  - To drill back up, look for a green return arrow icon in the lower left of a chart, as in the third picture.



## Step 7 — Filtering dashboard data for relevancy



**i** Many of our dashboards allow you to **filter data** to make it relevant to you personally.

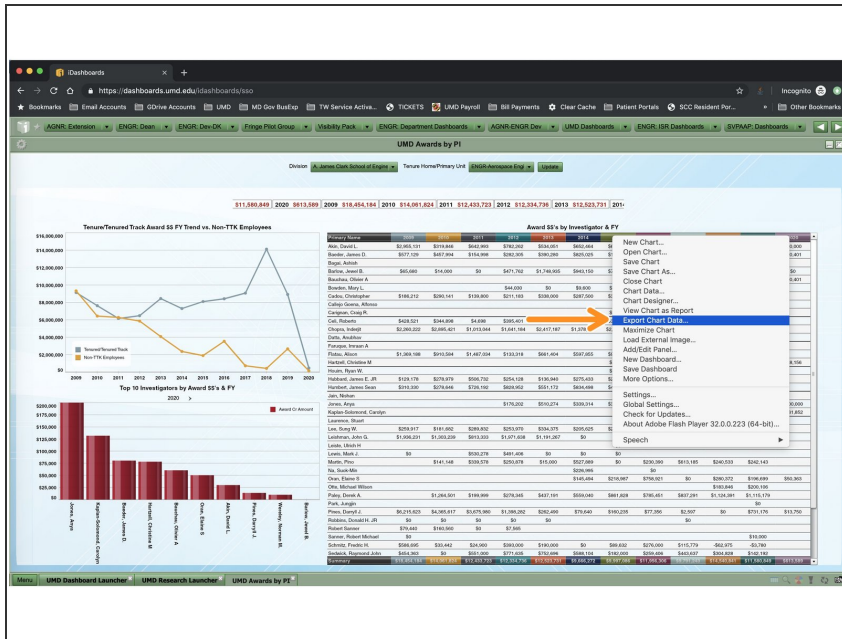
- Filters are called *dashboard parameters* and are usually available via dropdowns at the top of a dashboard, as in the first picture.

**★** Many of our filters use the same logic. You will usually find a division filter, department filter, and sub-department filter.

- In this example (the UMD Awards by PI dashboard), data can be filtered by **Division** and **Tenure Home / Primary Unit** of the faculty member.
- In the second picture, I've filtered the data to *Engineering* using the **Division** filter and *Aerospace Engineering* using the **Tenure Home / Primary** unit filter.

**i** Many filters allow you to select more than one value, useful to see multiple units on one dashboard.

## Step 8 — Exporting data from charts for your own analysis



When you find data on a dashboard you want to analyze in a different way than we have presented it, you can quickly export it into a **csv file** for your own analysis.

- To export data, simply **right-click** on the chart you would like to pull the data from and select the **Export Data** option in the corresponding menu.
- The data will download to your computer in a **csv file titled after the chart name** and can be used in any program that will read csv files, including **Microsoft Excel**.

You're now a UMDashboards expert!