

Button and Dropdown action widgets for dashboards (11.2.0 and above)

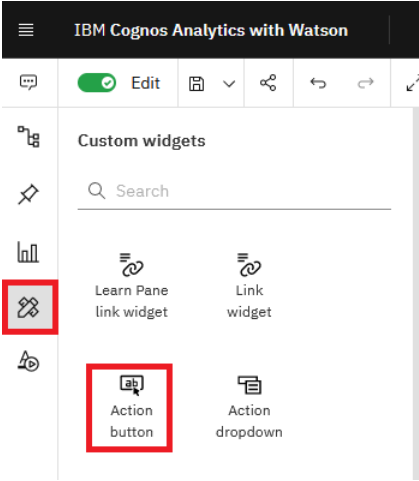
Contents


- Action Button Widget.....3
 - Using the Action button widget to record and perform actions3
 - Using the Action button widget to open a dashboard5
 - Using the Action button widget to open a link.....5
 - Using the Action button widget to set a parameter value6
 - Action button widget: Setting separate actions for button pushed and not pushed9
- Action Dropdown Widget.....11
 - Using the Action dropdown widget to record and perform actions11
 - Using the Action dropdown widget to set a parameter value12
 - Setting actions for other widgets (visualizations and shapes).....13

Action Button Widget


Using the Action button widget to record and perform actions

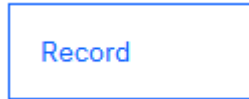
1. Click the *Action button* widget in the *Custom widgets* panel to add it to the canvas of any dashboard that contains a visualization (e.g. Bar chart of Revenue by Product) you want to perform actions on. Position and size the *Action button* widget as required.



2. Select the Action button widget and open the properties panel **Properties**  , expand

Options, and enter a *Label* for the button, for example, "Show Top 5".

3. Open the Actions panel , and under *Action*, select *Play recording*.



4. Click the *Record* button that appears:
5. Perform the actions you want to record. For example, select a visualization, open the *Fields* panel, and apply a Top/bottom filter to a measure, setting it to *Top count* with 5 entries.



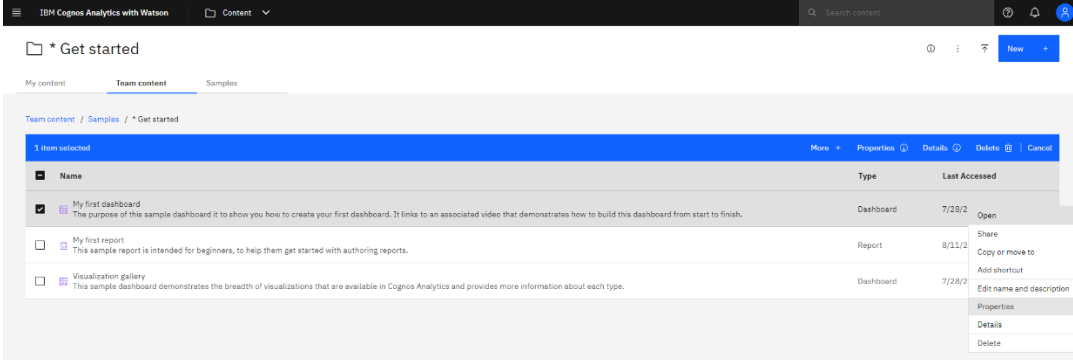
6. Click the *Stop recording* button:
7. Remove the Top 5 you just added to the visualization.
8. To perform the recorded actions, switch the dashboard from *Edit* to *Consumption* mode and click the button.


Actions that can be recorded are:

- Property changes
- Actions for existing visualizations
- Tab changes


Using the Action button widget to open a dashboard

1. Copy the ID of the dashboard you want to open from its properties:



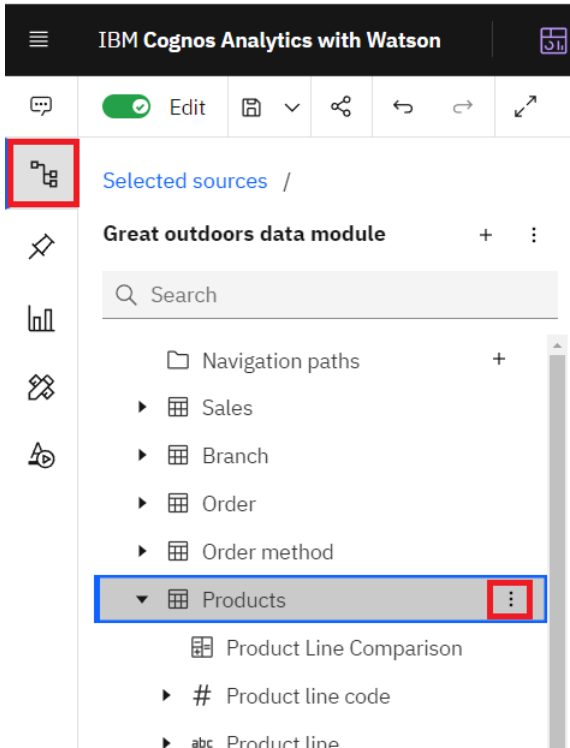
2. Open an existing dashboard. Click the *Action button* widget in the *Custom widgets* panel to add it to the canvas. Position and size it as required.
3. Open the properties panel for the widget, expand *Options*, and enter a *Label* for the button, for example, "Open Product line dashboard".
4. Open the Actions panel  and under *Action*, select *Open dashboard*.
5. Under *Dashboard ID*, paste the ID of the dashboard to open and press Enter.
6. Switch the dashboard from *Edit* to *Consumption* mode and click the button to open the specified dashboard.

Using the Action button widget to open a link

1. Open an existing dashboard.
2. Click the *Action button* widget in the *Custom widgets* panel to add it to the canvas. Position and size it as required.
3. Open the properties panel for the widget, expand *Options*, and enter a label for the button, for example, "Go to IBM.com".
4. Open the Actions panel  and under *Action*, select *Open link in new tab*.
5. Under *URL*, enter the address (e.g. <http://www.ibm.com>)
6. Switch the dashboard from *Edit* to *Consumption* mode and click the button to open the specified URL.

Using the Action button widget to set a parameter value

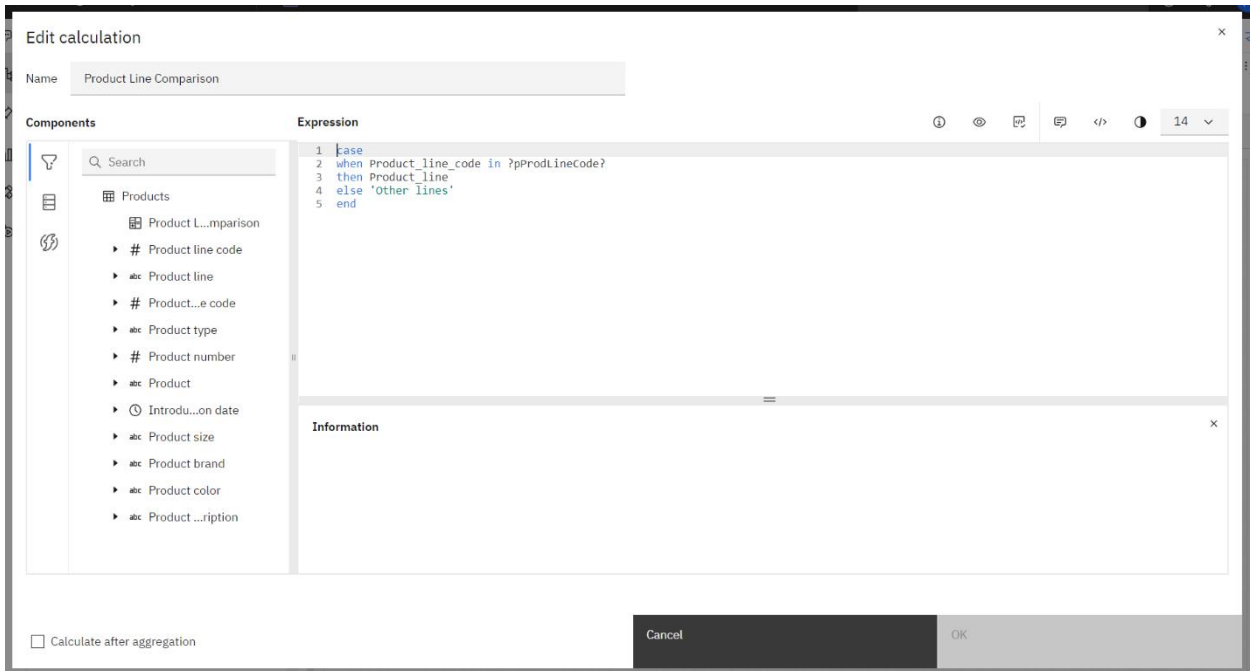
1. Create a new dashboard and use the following sample data: *Team content > Samples > By feature > Core > Data > Great outdoors data module*
2. In the *Sources* panel, click the *More* icon beside the *Products* table and select *New Calculation...*



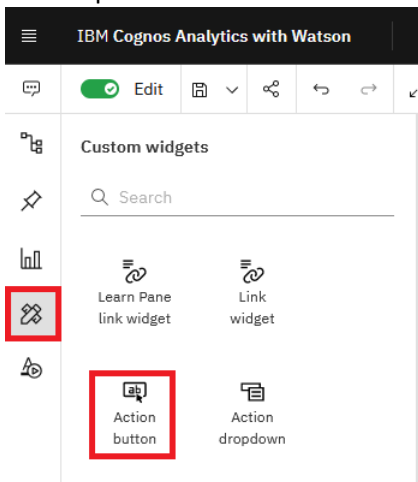
3. In the resulting dialog, type "Product Line Comparison" in the *Name* field.
4. Enter the following expression. Notice that it contains a prompt for a parameter (e.g. pProdLineCode):

```
case
when Product_line_code in ?pProdLineCode?
then Product_line
else 'Other lines'
end
```


5. Click **OK**:



6. Click the *Action button* widget in the *Custom widgets* panel to add it to the canvas. Position and size it as required.



7. Open the *Properties* panel for the widget, expand *Options*, and enter a *Label* for the button, for example, “Camping Equipment”.

8. Open the *Actions* panel [Actions](#) , and under *Action*, select *Set parameter*.

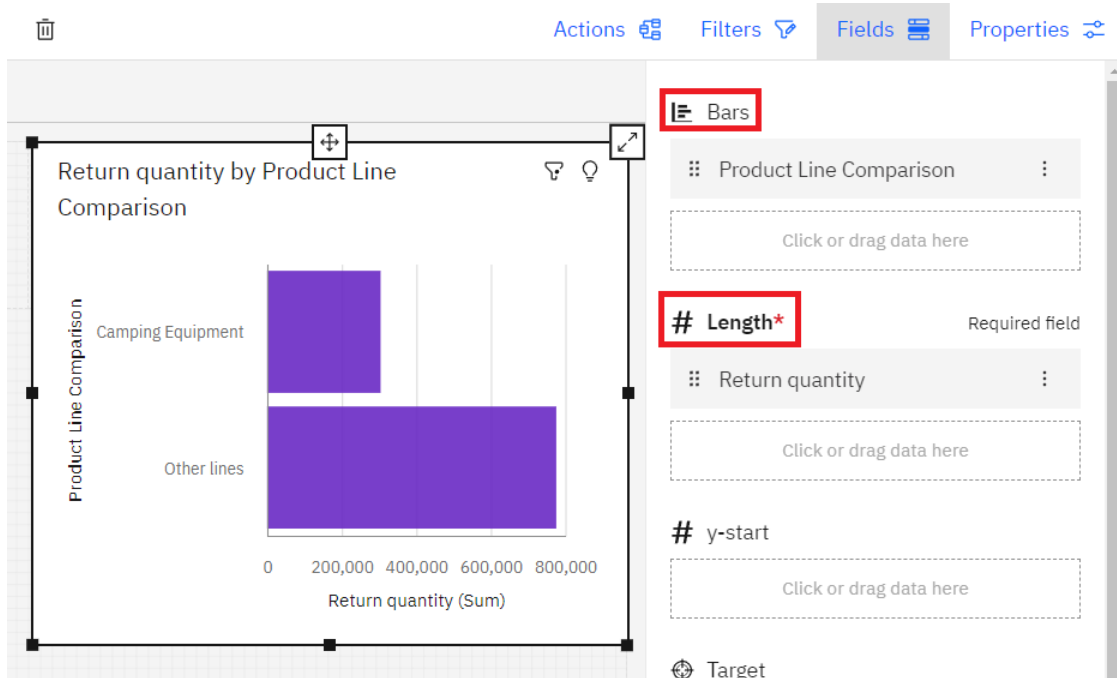
9. Under *Parameter name*, enter the parameter to be set (e.g. pProdLineCode).

10. Under *Parameter value*, enter the value to use (e.g. 991).

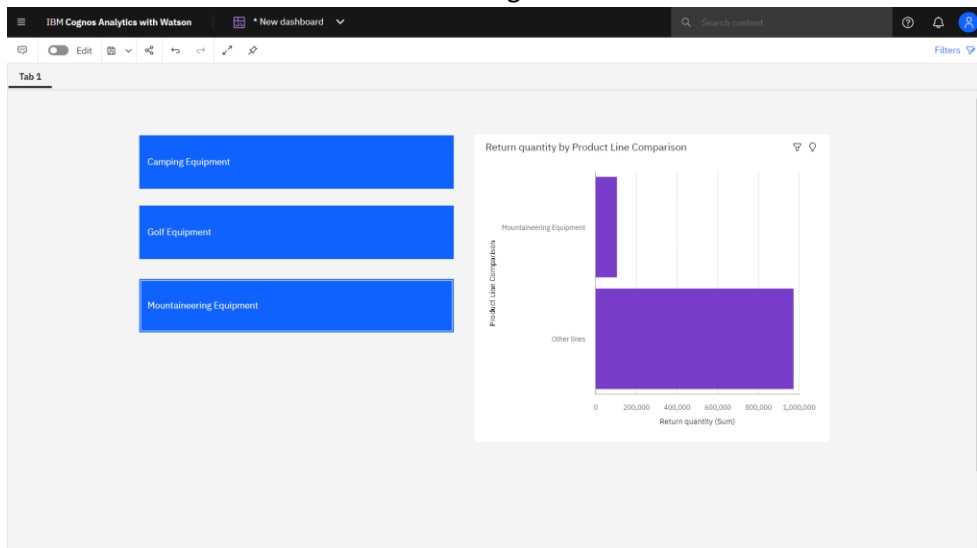
11. Create a second button by repeating Steps 6-10 with the following:

- a. Label: Golf Equipment
- b. Action: Set parameter
- c. Parameter name: pProdLineCode
- d. Parameter value: 995

12. Create a third button by repeating Steps 6-10 with the following:
 - a. Label: Mountaineering Equipment
 - b. Action: Set parameter
 - c. Parameter name: pProdLineCode
 - d. Parameter value: 992
13. Drag a *Bar* visualization from the *Visualizations* panel onto the canvas.
14. Populate the visualization with data by dragging the new calculation named *Product Line Comparison* onto the *Bars* slot and dragging *Returned items > Return quantity* onto the *Length* slot:



15. The final dashboard should look something like this:

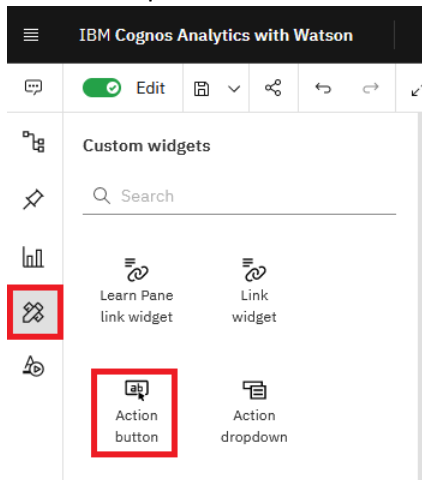


16. Switch the dashboard from *Edit* to *Consumption* mode. Clicking on any button will pass the associated parameter to the Bar visualization.

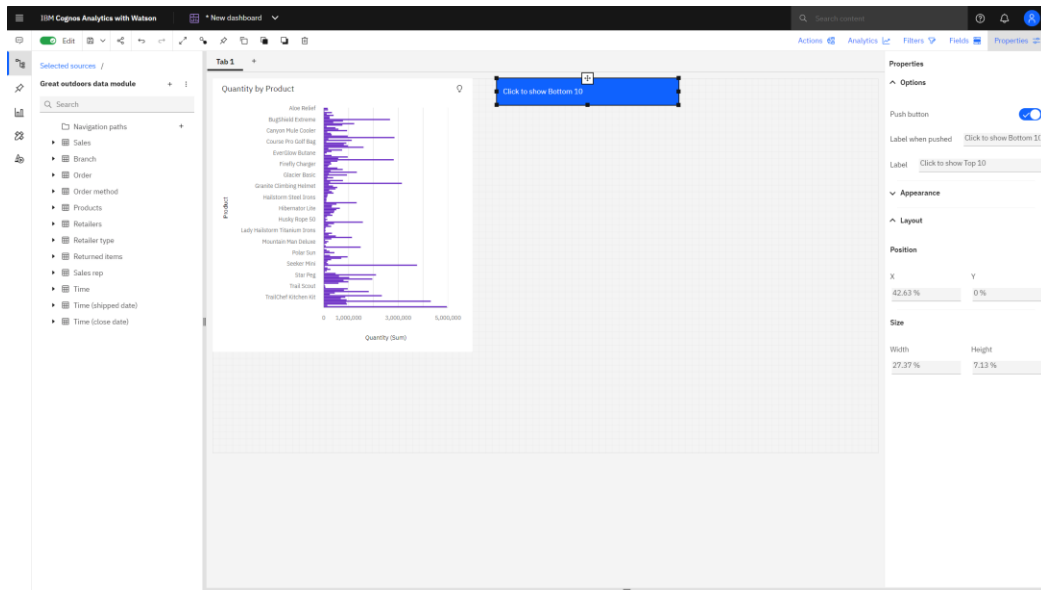
Action button widget: Setting separate actions for button pushed and not pushed

Note: You can currently only use the *Play recording* action for this feature.


1. Create a new dashboard and use the following sample data: *Team content > Samples > By feature > Core > Data > Great outdoors data module*
2. From the *Visualizations* panel, drag a *Bar* visualization onto the canvas
3. From the *Sources* panel, open the *Products* table and drag *Product* onto the *Bars* slot of the visualization. Open the *Sales* table and drag *Quantity* onto the *Length* slot
4. Click the *Action button* widget in the *Custom widgets* panel to add it to the canvas. Position and size it as required.



5. Open the properties for the action button and expand *Options*.
6. Enter "Click to show Top 10" in the *Label* property
7. Toggle the *Push button* property on.
8. Enter "Click to show Bottom 10" in the *Label when pushed* property. Your dashboard should look like this:



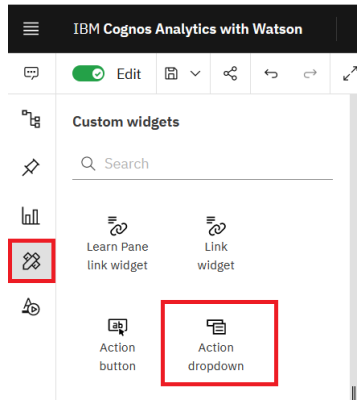
9. Now you can click on the blue action button itself to switch between the Pushed and Not Pushed states. Let's start with Pushed. Click the action button until you see the label *Click to show Bottom 10*


10. Open the **Actions** panel  and under *Action*, select *Play recording*. Click the *Record* button. Select the Bar visualization, open the *Fields* panel, click the ellipsis beside *Quantity*, and select *Top or bottom*. Select the *Top count* radio button and dismiss the dialog. Click the *Stop recording* button. Notice that in this use case, the label of the button ("Click to show Bottom 10") is actually the opposite of the action that you are assigning it (e.g. set Top 10).
11. Now we will set an action for Not Pushed. Click the action button until you see the label *Click to show Top 10*
12. Open the *Actions* panel and under *Action*, ensure that *Play recording* is selected. Click the *Record* button. Select the Bar visualization, open the *Fields* panel, click the ellipsis beside *Quantity*, and select *Top or bottom*. Select the *Bottom count* radio button and dismiss the dialog. Click the *Stop recording* button. Notice again that in this use case, the label of the button ("Click to show Top 10") is actually the opposite of the action that you are assigning it (e.g. set Bottom 10).
13. Switch the dashboard from *Edit* to *Consumption* mode. Click the button to switch from showing the top ten or the bottom ten products by quantity.

Action Dropdown Widget

Using the Action dropdown widget to record and perform actions

1. Click the *Action button* widget in the *Custom widgets* panel to add it to the canvas of any dashboard that contains a visualization (e.g. Bar chart of Revenue by Product) you want to perform actions on. Position and size the *Action button* widget as required.




2. Select the Action Dropdown widget, open the *Properties* panel, expand *Options*, and enter a comma-delimited list of labels, for example, "Show Revenue, Show Planned Revenue".
3. Open the *Actions* panel , and under *Action*, select *Play recording*.
4. Click the Record button that appears.
5. Perform the actions you want to record for the first option in the dropdown (Show Revenue). For example, select a visualization, open the *Fields* panel, and set the measure to Revenue.
6. Click the *Stop recording* button.
7. Select the next entry in the dropdown list (Show Planned Revenue) and repeat steps 3-6.
8. Switch the dashboard from *Edit* to *Consumption* mode. To perform the recorded actions, click the options from the dropdown list.

Actions that can be recorded are:

- Property changes
- Actions for existing visualizations
- Tab change

Using the Action dropdown widget to set a parameter value

1. Click the *Action dropdown* widget in the *Custom widgets* panel to add it to the canvas with a visualization you want to perform actions on. Position and size it as required.
2. Select the Action Dropdown widget, open the Properties panel, expand *Options*, and enter a comma-delimited list of labels, for example, “Set year to 2020, Set year to 2021”.
3. Open the Actions panel  , and under *Action*, select *Set parameter*.
4. Under Parameter name, enter the parameter to be set.
For example, if there is a parameter “?YEAR1?” in a calculation that you want set it with this action, enter YEAR1 for Parameter name
5. The parameter value that will be set is the selected dropdown value. You can override the value by entering your own custom value under Parameter value.

Note: Although one of the actions that can be selected for an Action dropdown entry is *Open link in new tab*, using this option is not recommended at this time. A known issue restricts the link to be opened to the one specified for the last entry. To open a link, use an Action button instead of an Action Dropdown.

Setting actions for other widgets (visualizations and shapes)

Visualizations and static widgets such as Shapes can now have the following actions assigned to them: Open link in new tab, Set parameter, and play recording. These actions can be set to trigger on click, double click, data selection, or data point double click. The latter two apply only to visualizations.

General Procedure:

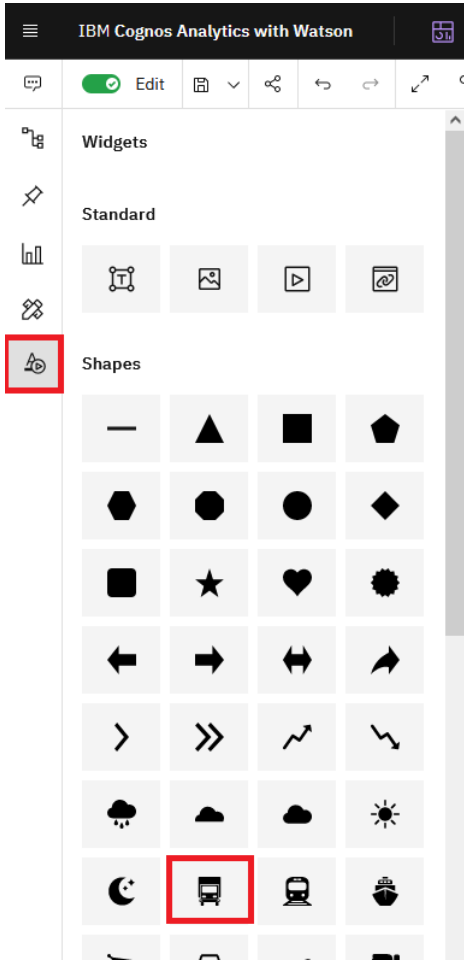
1. Select a visualization or shape widget and open the *Actions* panel and specify one of these actions:
 - Open link in new tab
 - Set Parameter
 - Play recording
2. Set the *Action trigger* property to one of:
 - Click
 - Double click
 - Data selection (visualizations only)
 - Data point selection (visualizations only)
3. Take any required steps for the selected action.
4. Switch the dashboard from *Edit* to *Consumption* mode to perform the action


Notes:

- For a data selection trigger, change the selection on the visualization and set up the actions for each selection.
- When using the “Set Parameter” options with a visualization, the default value that will be used when setting the parameter is the label of the datapoint selection. You can use your custom value by entering your own value under “Parameter value”.

Example:

1. Drag a *Shape* from the *Widgets* panel onto the canvas:



2. With the Shape selected, open the *Actions* panel  , and under *Action*, select *Open link in new tab*.

3. For the *Action trigger* property, select *Click*:



4. Under *Url*, type the address (e.g. <https://www.ibm.com>) and click *Enter*
5. To open the link, switch the dashboard from *Edit* to *Consumption* mode and click the Shape.