INEIGHT

EXPLORE USER GUIDE

EXPLORE



Release 26.10
Last Updated: 06 November 2026

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INEIGHT EXPLORE

To control and communicate the vast amounts of information that come along with complex projects, you need an analytics solution that connects to quality data and can easily turn real-time project information into actionable insights. InEight Explore provides the perfect combination of high-quality data you can rely on, along with self-service dashboards and analytics.

Explore embeds the visualization of Microsoft Power BI, complete with pre-defined dashboards that you can customize. You can choose the information you want to include and decide how you want it to look in the dashboard. The built-in analytics capabilities of InEight Explore enable users to drill into the data, find relationships and patterns, and get answers to questions in record time.

InEight recognizes you might have many sources of information that are of interest to project teams. That’s why Explore is built to coexist with other systems. You can embed dashboards generated from

other systems into InEight dashboards, so that project team members only have one place to go for all the latest information.

BUILD

Drill into the data, find relationships and patterns, and get answers to questions in record time.

CONNECT

Harness the built-in power of Microsoft Power BI to create and share your own dashboards.

INNOVATE

Give project teams the power to answer their own questions.

CHAPTER 1 – NAVIGATION AND STANDARD DASHBOARDS

1.1 STANDARD DASHBOARDS

To access dashboards from the Main menu, click **Explore**, and then select **Dashboards**.

You do not have to be signed in or assigned to a particular project to access Explore. Explore is a separate application from those used in any given project and is available to all users in an organization that have been assigned the applicable role or permissions. The information provided in Explore is not in real time for any given project.

There are multiple out-of-the-box dashboards available in Explore with each having its own refresh schedule, which is determined by the product groups.

Dashboard	Description
Change	Allows you to manage the history of project changes, their associated costs, and the conversion of issues into change orders for both owners and subcontractors. Provides early visibility into potential changes, allowing you to begin an audit trail before changes impact the project. Features include capturing issue details (name, description, start date, source/cause, scope, client notification), tracking issues, converting them to Potential Change Orders (PCOs) and Client Change Orders (CCOs), and supporting legal documentation.
Change Issue	Provides insights into project changes and allows project teams to see the different stages of these changes that are initiated as Issues to become PCOs (Potential Change Orders), and then CCOs (Client Change Orders). All the relevant metrics about Issues, PCOs, and CCOs are shown with the ability to filter the data down by organization, project, and date range. The data in this dashboard is sourced from InEight Change to help you understand trends over time, counts, and values associated to contract changes.
Connected Analytics Index	Provides a catalog of all reporting items contained in Report, Explore and Replicate. This dashboard helps you locate the specific data fields in InEight Reporting APIs and provides updated schema information for each Explore and SelfService API, and Replicate view when your environment upgrades to a new release.
Connected Analytics Utilization	Provides metrics to show utilization by users over time that helps to identify level of engagement with InEight Report and Explore applications. Also provides information on the functionality of the reports that were run.

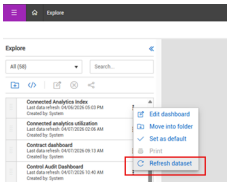
Dashboard	Description
Contract	Allows you to track your contracts throughout the entire contract lifecycle and provides a single focal point where you can manage contracts and drive action where it is needed. This dashboard can also be launched directly from the Actions menu in InEight Contract.
Control Audit	Allows you to track the changes that occurred in the CBS, ACS, Pay Items, and Change Register pages in InEight Control. In the dashboard, you can see who made changes, the items that were changed, and the value amounts in the change. Information captured in the dashboard also lets you see when a sync between Control and external systems was performed.
Core Project	Provides a comprehensive overview of platform-level items, including organizations, projects, roles, permissions, user role assignments, and logins. This dashboard also provides insights into utilization of each InEight application in the cloud platform by showing the total number of main objects such as the total issue count in Change or cost items in Control.
Design	This dashboard brings together planning, progress, productivity, resource, and quantity insights into one consolidated reporting experience. The dashboard enables Engineering teams and project leaders to quickly understand how design is progressing, whether teams are performing efficiently, where work is ahead or behind, how resources are being utilized, and what scope and deliverables remain. See the Design Dashboard Overview video for more information.
Estimate Portfolio	Provides an in-depth, consolidated view of your entire estimate portfolio and covers a wide range of InEight Estimate SaaS product features and functionality. See the Estimate Portfolio Dashboard video for more information.
Field Execution	A productivity centric dashboard that offers a comprehensive analysis on field performance. Metrics ranging from Progress Curves, Planned vs Actual, Daily Gain/Loss, Cost/Hours Productivity, Crew Performance, Timesheet Exceptions, Issues and more are available to help identify bottlenecks and proactively make informed decisions to mitigate deviations from project budget. The Time Intelligence filters such as Next Week, Next 3 weeks or Next Month provide users the ability to see future productivity targets, which helps with resource planning. See the Field Execution Dashboard video for more information.
Model Tracked	This dashboard highlights Issues captured in InEight Model, enabling effective management and prioritization. It provides key details such as due dates,

Dashboard	Description
Issue	responsible parties, categories, and more to streamline issue resolution.
Package Milestone	Allows you see information about user-defined milestones in the procurement process over time. Also provides detailed bid package information at the line item level with the ability to link back to InEight products.
Portfolio	Consolidating data from multiple InEight applications, this dashboard helps you understand how your projects are progressing and identify areas that might need attention sooner rather than later. The dashboard highlights key metrics and data for your project from Control, Contract, Change, Plan, Progress, and Platform, and shows it in one centralized location. From this information, you can understand the overall health of your projects or utilize this dashboard to compare across milestones.
Project Controls	An earned value-centric dashboard that provides a detailed and holistic view of budget performance. This dashboard encompasses all key Earned Value metrics, including budgets, estimates, forecasts, actuals, revenues, changes, and resources that provide valuable insights to help track and manage financial performance throughout the project lifecycle. By visualizing these metrics in one place, the dashboard lets teams assess trends, identify variances, and make data-driven decisions to maintain control over costs and resources. This dashboard also facilitates a Data Integrity Health Check, pinpointing exceptions and inconsistencies—an essential feature for maintaining robust and reliable cost management within InEight Control.
Schedule	Provides comprehensive insights into project schedules, offering detailed activity and schedule comparisons, float trend analysis, and resource utilization tracking. It includes high-level risk and opportunity overviews, deeper analyses of threats and mitigations, and a centralized event register. With industry-standard schedule quality metrics and tools to evaluate mitigation efforts, this dashboard ensures users can trust their data while identifying risks, opportunities, and areas requiring attention across progress updates or what-if scenarios.

1.1.1 Dashboard refresh

On the Dashboard page, a manual refresh option shows in the dashboard menu for users with the permission Refresh Dashboard datasets (Suite administration > Roles and permissions >Explore > **Dashboards**). This allows administrators to manage the roles that can perform manual updates and

allows users to refresh dashboard datasets without having to leave the Explore application. See Refresh dataset for more information about manual refresh.



To ensure optimal system performance and stability, there are set global limits for refreshing dashboard datasets that are enforced across all tenants.

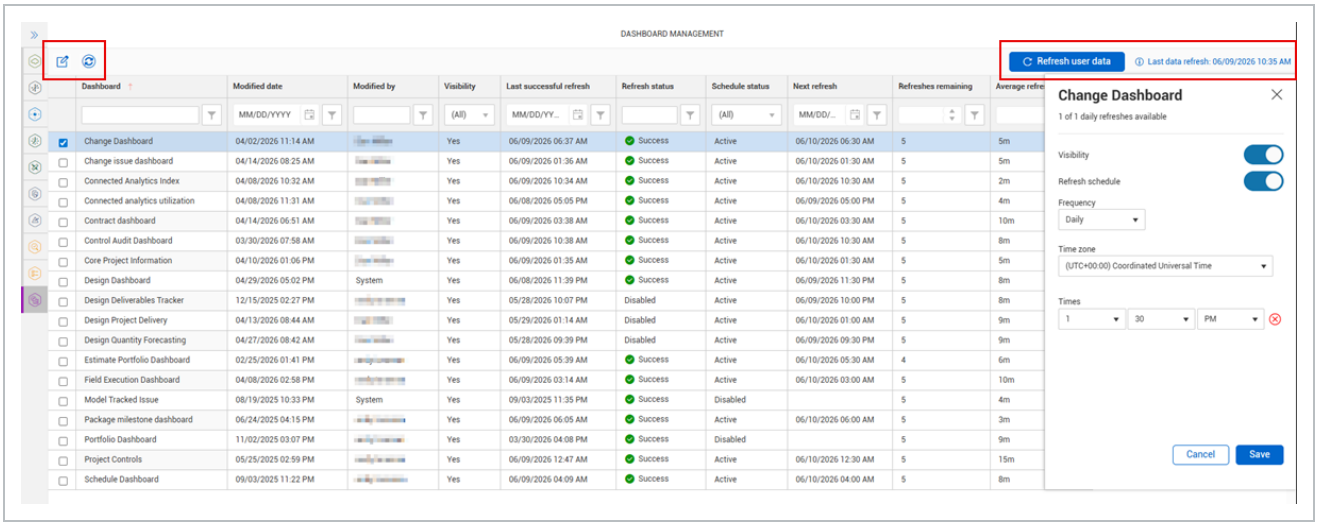
- Daily cap: Users are limited to refreshing five times per dashboard, including any custom dashboards, within a 24-hour period.
- Cool-down period: A 30-minute wait is required between consecutive refresh requests to prevent system overload.

1.1.2 Dashboard management

This Explore settings page lets administrators show and hide dashboards at the organization level, set and control the dashboard refresh schedule, and initiate a dashboard dataset refresh on demand. You must have the role of Organization Admin (or higher) and the required permissions to view and access the Dashboard Management page.

To open the Dashboard Management page for an organization, in the Main menu select the organization, and then go to Settings > Explore > **Dashboard Management**. The page opens and shows a list of all the standard dashboards and the status for each of them.

The Refresh user data button lets an administrator initiate a refresh of user data in the background for new Explore users or users with new dashboard permissions, which allows them to access the dashboards right away. Otherwise, users must wait for the overnight refresh to complete (shown as Last data refresh) for the changes to take effect.



On the page the list shows dashboard visibility, scheduled refresh status, and manual refresh status. Select a dashboard from the list to enable the Edit dataset settings and Refresh dataset icons.

1.1.2.1 Edit dataset settings

When you click the **Edit dataset settings** icon, it opens a slide-out panel for the dashboard where you can do the following:

- Set to show or hide the dashboard for the organization
- Enable and configure the dashboard refresh schedule
- Disable the refresh schedule

> Use the average refresh time to help when adjusting schedules to avoid having multiple dashboards refresh at the same time. Most dashboards can only be scheduled to refresh once per day.

1.1.2.2 Refresh dataset

The Refresh Dataset icon is also enabled when a check box is selected, which lets you initiate a manual ad-hoc refresh for the selected dashboard. The Refreshes remaining column shows the number of manual refreshes available for the day. A maximum of five refreshes is allowed per day, per dashboard.

- Refresh actions are controlled by system rules such as daily limits, cooldowns, and scheduling. Dialog boxes show a message based on the following scenarios:

- Eligible (outside cooldown, refreshes available): Prompts you to confirm the refresh and shows remaining count.
- Dataset currently refreshing: Refresh blocked
- Within 30-minute cooldown: Refresh temporarily unavailable
- Daily limit reached (5/5): No further refreshes allowed
- Scheduled refresh within 30 minutes: Refresh blocked until schedule completes

1.2 EXPLORE PERMISSIONS

To access dashboards and APIs, you must be assigned a role with applicable permissions, which are defined by a system administrator. Permissions are pre-assigned to roles that are based on functional areas, such as project management, construction management, field office, operations, finance, compliance, and administration that let you run reports tagged with the same permission assigned to one of the roles. For more details, refer to Roles and Permissions in InEight Platform. Permissions are configured in Suite Administration > Roles and permissions > Permissions > **Explore**.

Permission Name	Description	Level
View shared dashboards and embedded content only	Allows users to see only dashboards and embedded content that has been shared with them individually. This will hide all standard dashboards for users with this permission.	Base user
View dashboards and embedded content	Allows users to view standard dashboards (data level permissions are allowed to the projects users are assigned to in Platform), custom dashboards that have been shared with them, add/edit external content, and view external content that has been shared with them. This permission also gives users access to create, edit, and delete their own folders (these folders are only available at the individual user level). This permission is the parent of all other permissions in Explore > Dashboards.	Base user
Edit and delete custom dashboards	Allows you to edit and save custom versions of the standard dashboards, this permission does not give sharing access. This permission is necessary for you to be added as a collaborator on a dashboard that is shared. Allows users to edit and save custom versions of the standard dashboards, this permission does not	Base user

Permission Name	Description	Level
	give sharing access. This permission is necessary for a user to be added as a collaborator on a dashboard shared with them.	
User level sharing	Allows users to share your custom dashboards and embedded content with other individual users.	Base user
Project level sharing	Allows users to share their custom dashboards and embedded content with all the users on a project, users can only do this for projects they are assigned to in Platform.	Project Admin
Organization level sharing	Allows users to share their custom dashboards and embedded content with all the users in an organization, users can only do this for organizations they are assigned to in Platform.	Org Admin
Reporting APIs	Allows a user to access to all the data in the reporting APIs for the selected products.	Base user
Access Explore settings	Allows users to access and utilize all the functionality on the Organization Settings > Explore page. This page allows users to control the visibility of dashboards for the whole organization, as well as the dashboard refresh schedules, and execute ad hoc refreshes. This permission also grants users access to see every custom dashboard built in the environment when in the Explore application.	Org Admin

1.3 DASHBOARD FOLDERS

In Explore, you can create folders to organize the various types of dashboards you create. This can help to easily identify dashboards you may refer to on a weekly basis versus monthly basis or dashboards you create for an executive level versus a field operations level. In a later lesson, you will learn how to modify and create these additional dashboards.

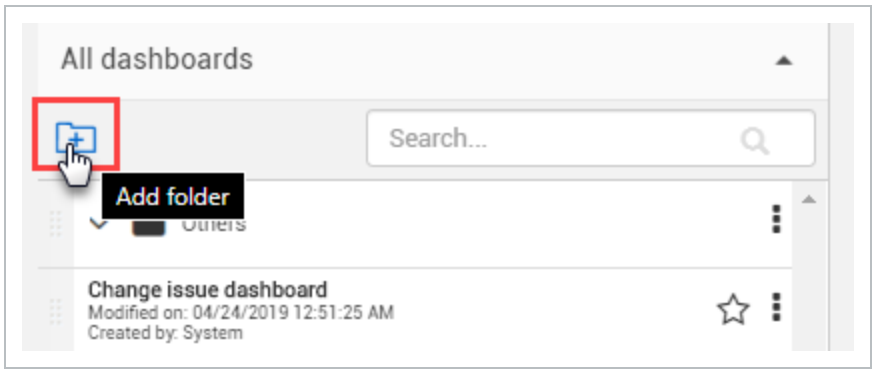
1.3.1 Folder Creation

The following Step by Step walks through the two ways you can create a dashboard folder.

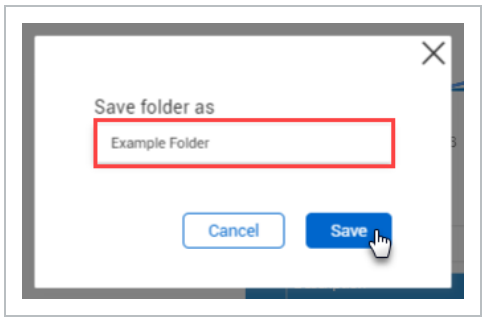
Create dashboard folders

Option 1:

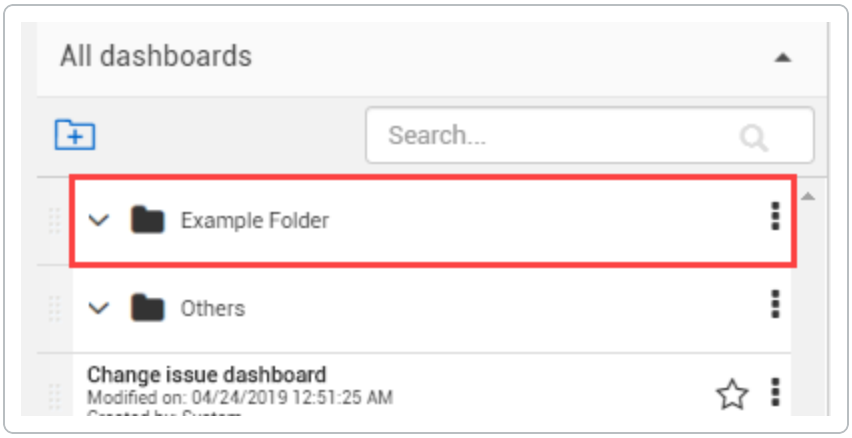
1. From the Dashboards page, click the **Add Folder** icon to add a folder.



   - A dialog box opens and prompts you to name the folder
2. In the Save Folder As field, type **Example Folder**, and then click **Save**.

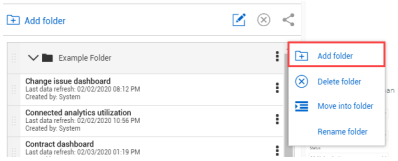


- The new folder will now show on the left panel as shown below.

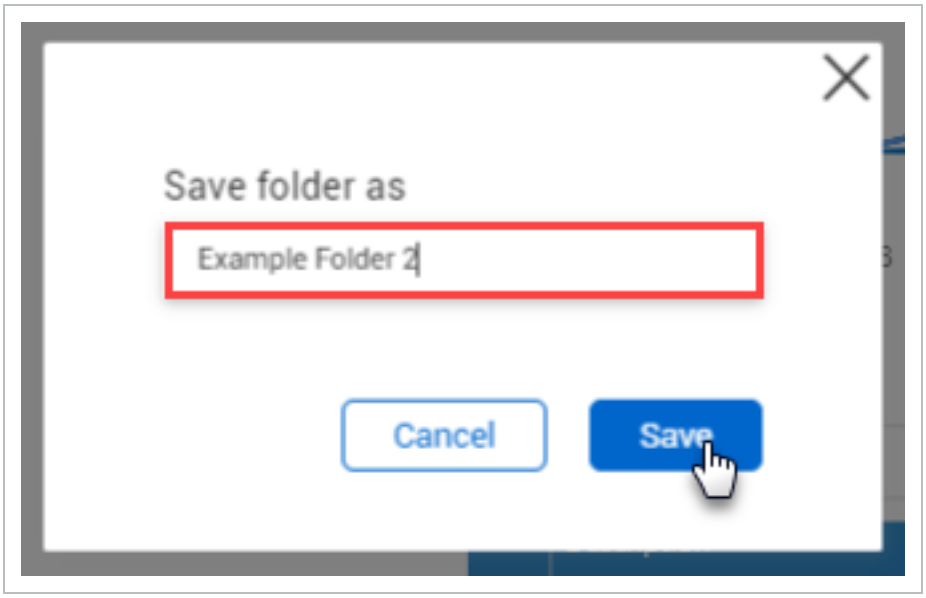


Option 2:

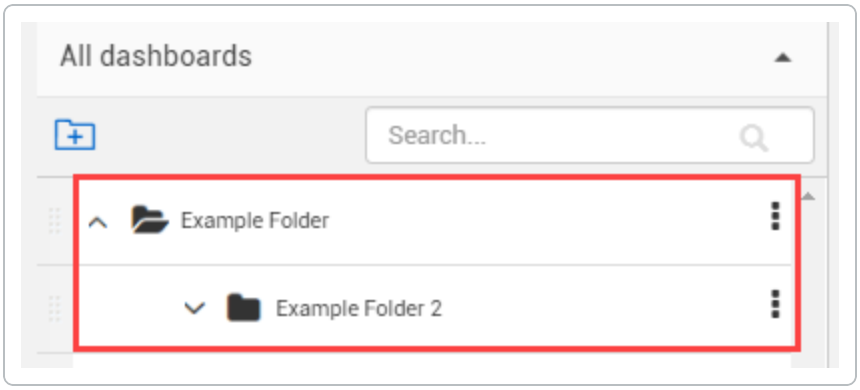
1. Click the **three Ellipses Context menu** icon to the right of the new Example Folder.
   - A slide-out panel opens
2. Click **Add Folder**.



3. In the Save folder As field, type **Example Folder 2**, and then click **Save**.



- A sub-folder has been created



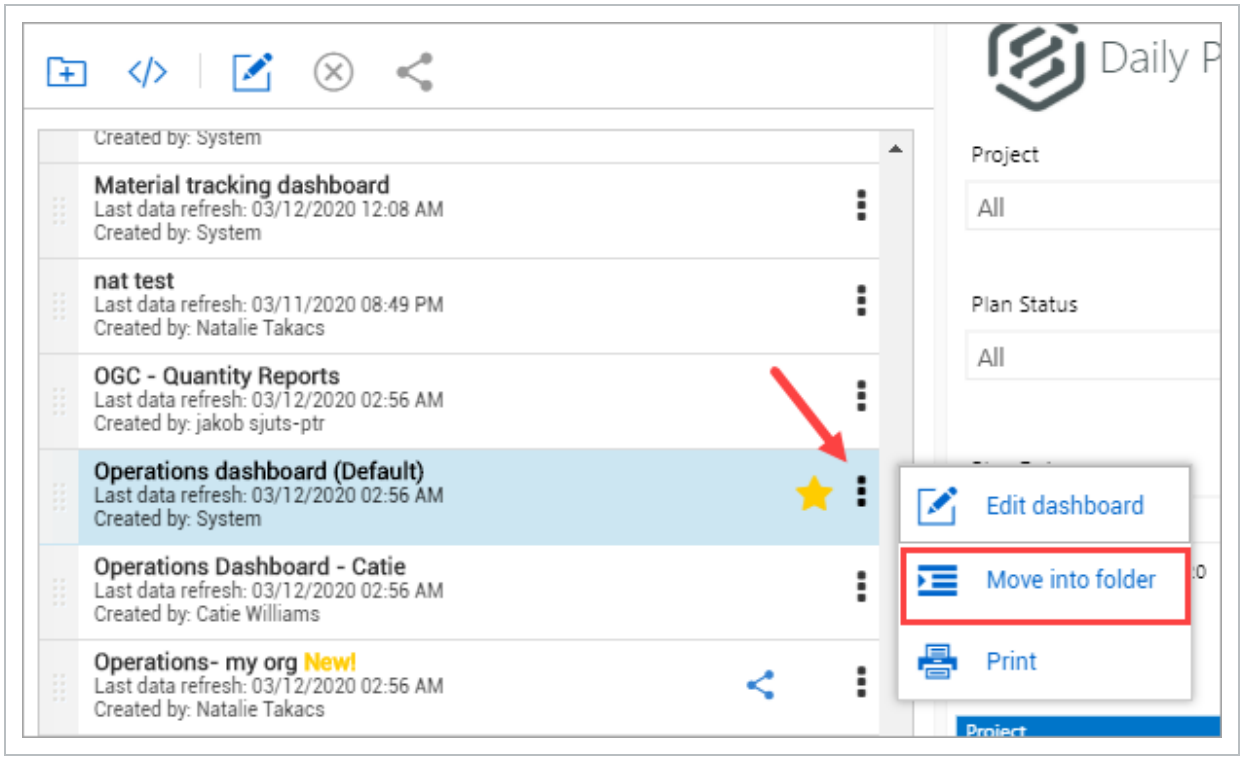
> Besides adding folders, you can edit, share, move, set as the default dashboard or delete the dashboard via this same Context menu icon.

1.3.2 Move Dashboards to a Folder

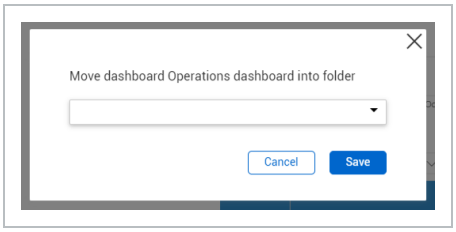
The following steps walk you through how to move a dashboard into a folder.

Move a dashboard into a folder

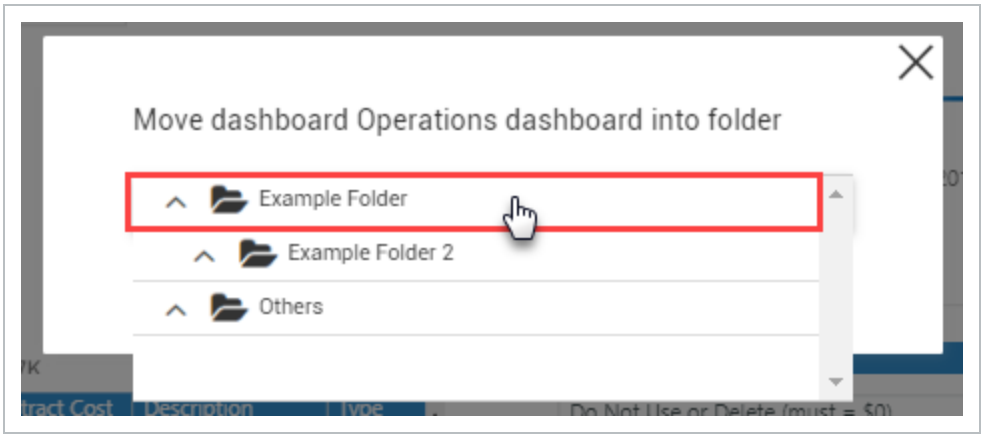
1. From the Dashboards page, click the **three-ellipses Context menu** icon of the Operations dashboard.
2. Click **Move into Folder**.



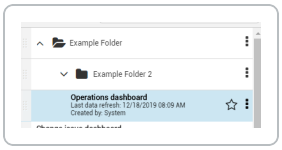
- A dialog box opens with a drop-down list to select the folder for which you want to move the dashboard into



3. Click the drop-down arrow, and then select **Example Folder**.



4. Click **Save**.
    - The Operations dashboard will now be located within the Example folder

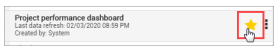


> You can use the same Context menu icon to remove a dashboard from a folder.

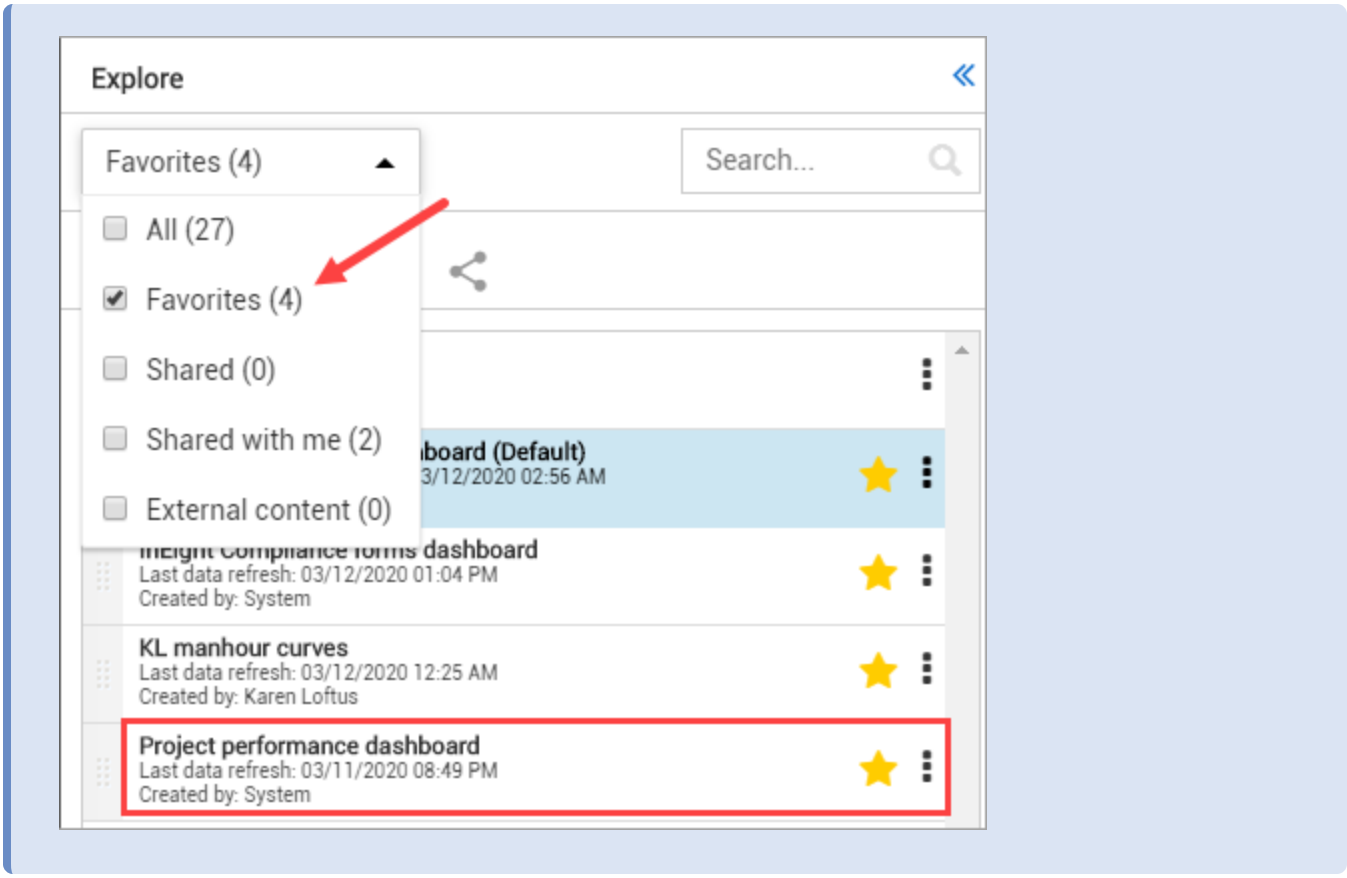
1.4 DASHBOARD FAVORITES

You can mark one or more dashboards as your favorite by clicking the **Favorites** icon on the right side of any dashboard. This can be done on the two system-created dashboards or any dashboards you create. This is a convenient way to access dashboards that you use often.

Click the **Favorites** icon next to the Project Performance dashboard.



> The dashboard now shows up under the Favorites header when selected from the drop-down list. The star remains yellow.



1.5 DASHBOARD SHARING AND COLLABORATION

The concept behind sharing a dashboard evolved as a means to save time and energy for those working together who share similar data needs. Sharing a dashboard may be a perfect option when the original dashboard doesn't need to be edited by the person who is viewing the shared dashboard. Collaboration goes a step further by granting the person with whom the dashboard is shared, permission to collaborate on and edit the dashboard. Think of collaboration as a subset of sharing, meaning you cannot collaborate on a dashboard until the dashboard is able to be shared. Only system dashboards that you personally have edited and renamed can be shared.

To share a system dashboard you must first save it as your default dashboard, re-save and re-name the dashboard, and then you can share or collaborate.

The word "Default" after the dashboard name represents your default dashboard, and Sharing is grayed out and unavailable as it is a default dashboard setting.

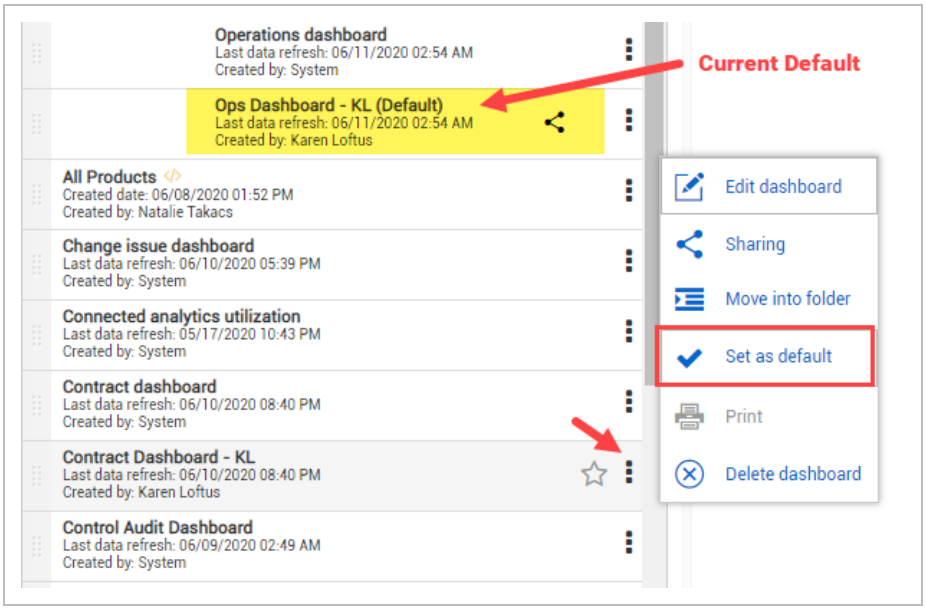
1.5.1 Set a Dashboard as Your Default

Initially, no single dashboard in InEight Explore is considered your default dashboard. Until you choose to share a dashboard, or collaborate with others, does it become an important function.

In order to share or collaborate with others on a dashboard you initiate, it must first be set as your default dashboard.

To set or change a dashboard as your default:

1. Click the **3-dot ellipses** on the right side of your desired dashboard.

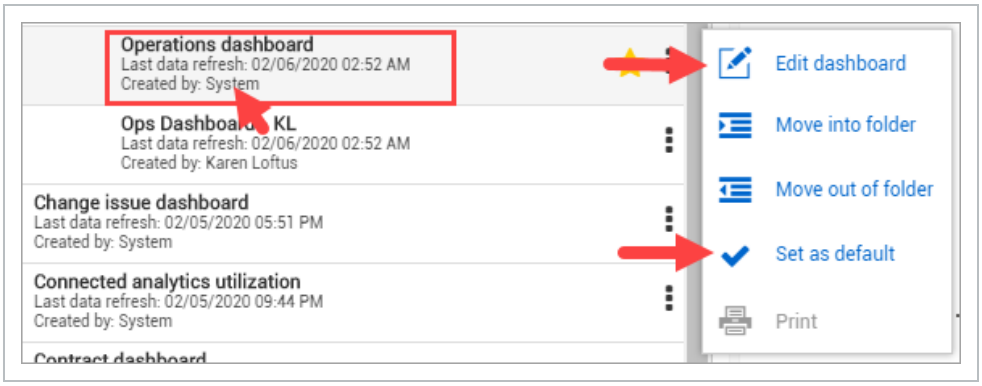


2. Select **Set as default**.
   - You have now set (or changed) your default dashboard

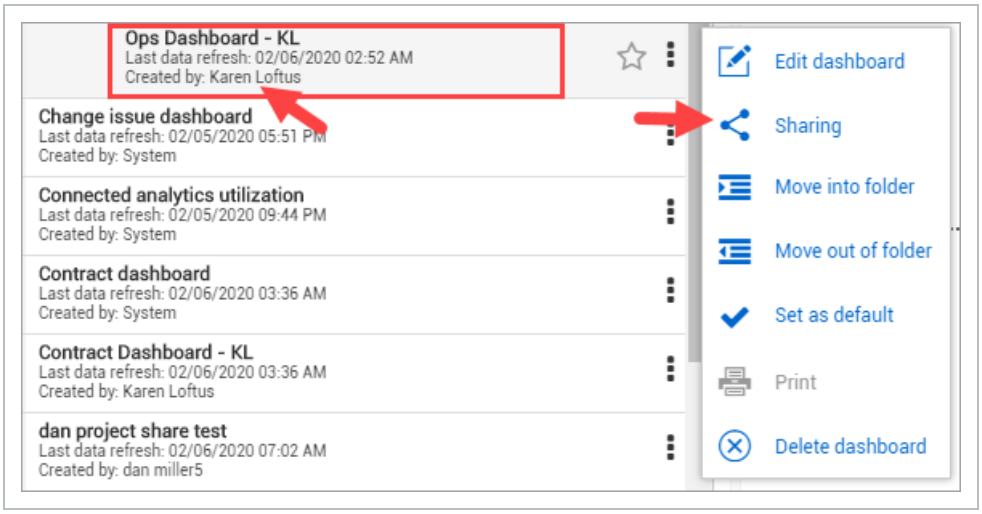
1.5.2 Share a Dashboard with Others

After a dashboard is shown as your default, the Sharing option becomes available to you.

The Operations Dashboard below does not have the Sharing option available as it is a System dashboard and it has not yet been set as the default and re-named.

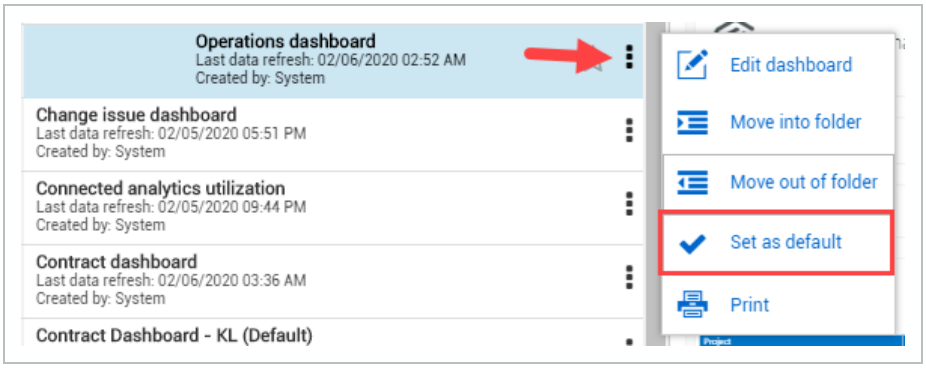


Conversely, the personalized, re-named dashboard called Ops Dashboard – KL has the Sharing option available.

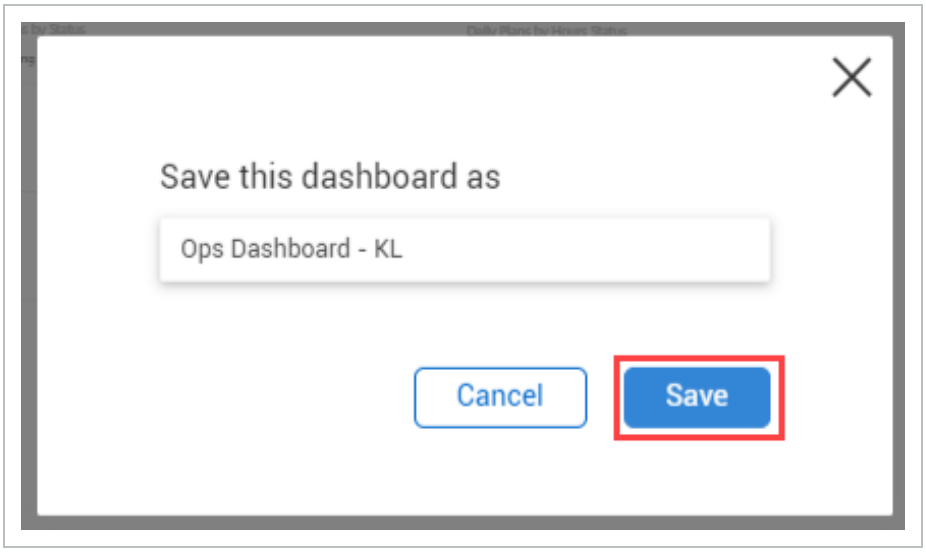


Share a Customized System Dashboard

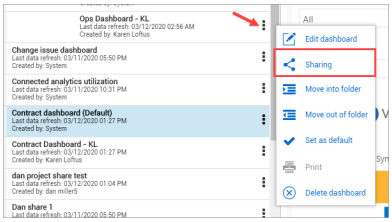
1. Select a system dashboard to share.
2. Click the **3 dot ellipses** on the right side of the system dashboard name.
3. Click **Set as Default**.



4. Click the **3 dot ellipses** again.
5. Click **Edit Dashboard**.
6. Make edits and go to **File > Save As**.
7. Re-name the dashboard.
8. Click **Save**.

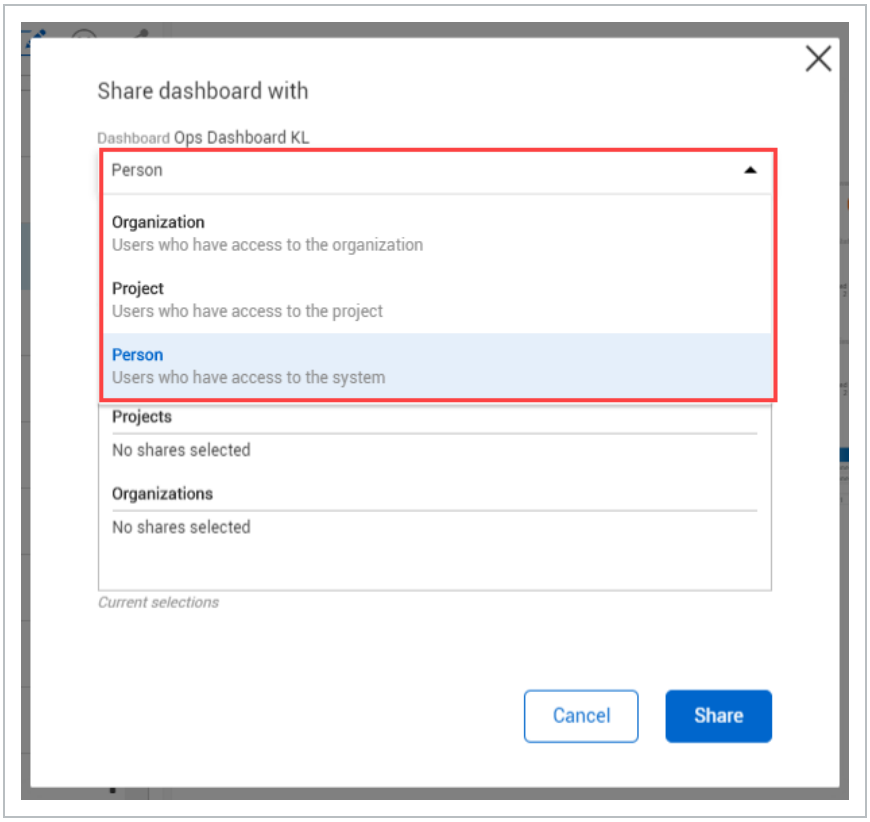


9. From the newly named dashboard, click the **Sharing** option.



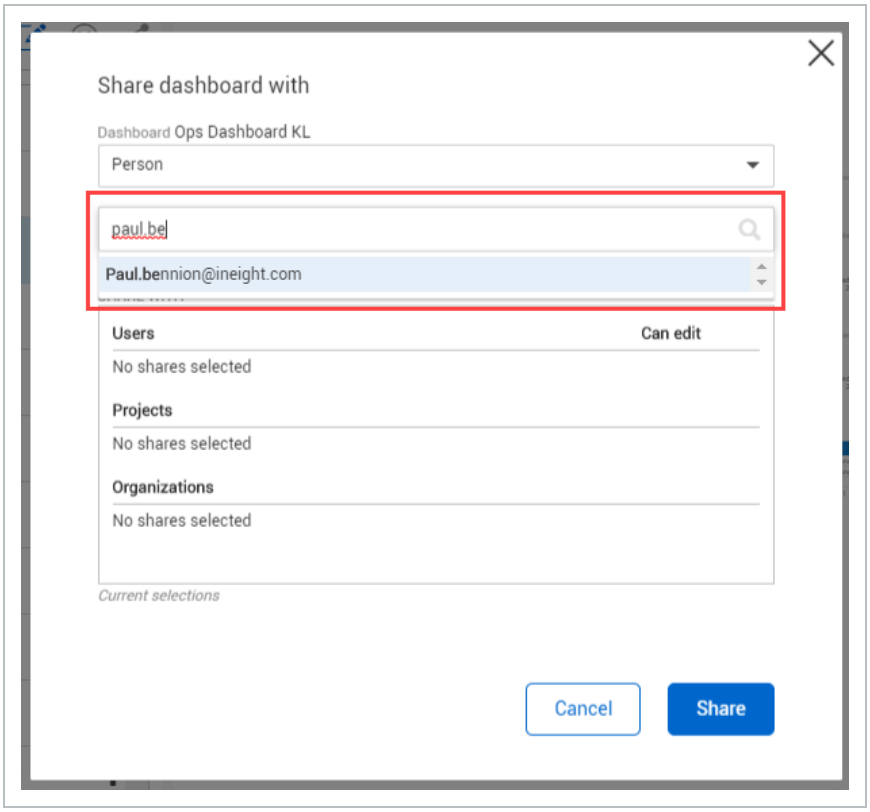
10. Select with whom you would like to share the dashboard by selecting an option from the drop-down list. Options include:

- Organization
- Project
- Person



- For example, if you choose to add a person, you can begin typing the name of a person's email address to be guided to select an individual. A similar concept is

available for Project and Organization



11. Click **Share**.
    - A Dashboard Shared notification will briefly appear on the top of your screen
    - Now, the Shared icon is visible to the right of the dashboard name



12.

> Elevated permissions are required to share at the project and org level.

> Use caution when using the Organization option, as all individuals will see this new dashboard option upon their next sign-on to Explore.

With each new log in to Explore, newly shared dashboards will show the yellow **New!** tag next to the dashboard name. Afterward, the New indicator will not show. Hovering over the **Share** icon indicates if the dashboard is being shared with you, or if you are sharing the dashboard with others.

A black **Share** icon indicates a dashboard is shared by you.



A blue **Share** icon indicates a dashboard is shared with you.



Click the blue **Sharing** icon to view the Sharing details for that specific shared dashboard. Click **Close** to return to the dashboard.

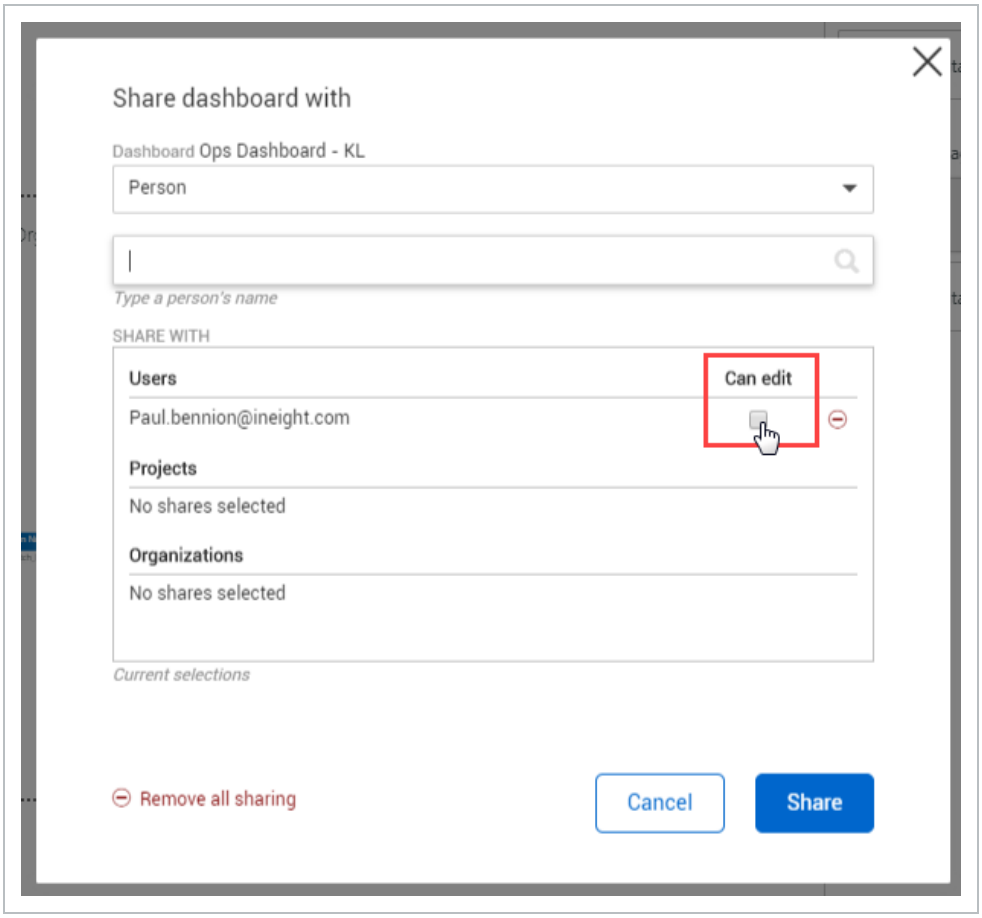
While you cannot edit others' dashboards, you can save your own copy of it and make your own modifications to it. When changes are made by you, others whom you share the dashboard with will also see your changes.

1.5.3 Collaborate on a Shared Dashboard with Others

Collaborating on a dashboard gives the person with whom the dashboard is shared not only the permission to view it, but also to edit the file. Any changes made will be visible to all parties who have access to the shared dashboard.

Using the process above, once you have gotten to the step of selecting who the dashboard will be shared with, in our example, we'll be sharing the dashboard with just one person.

Checking the **Can Edit** box and then clicking **Share** provides the person, project or organization the ability to collaborate with you on the shared dashboard.



1.5.4 Remove Sharing

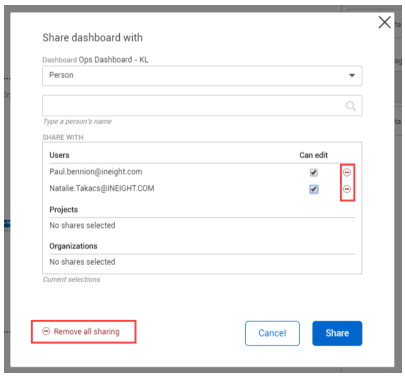
For any dashboard you create and share, you may also remove sharing. By hovering over the **Sharing** icon, you can identify the reports you have shared with others.

Remove Sharing

1. Click the black **Sharing** icon.



2. Either select **Remove all sharing** to remove all people from sharing mode, or the click the **Remove Sharing** red circles next to the names of those to remove.



- This change is instantaneous
- A dialog box will briefly appear to confirm the removal has occurred

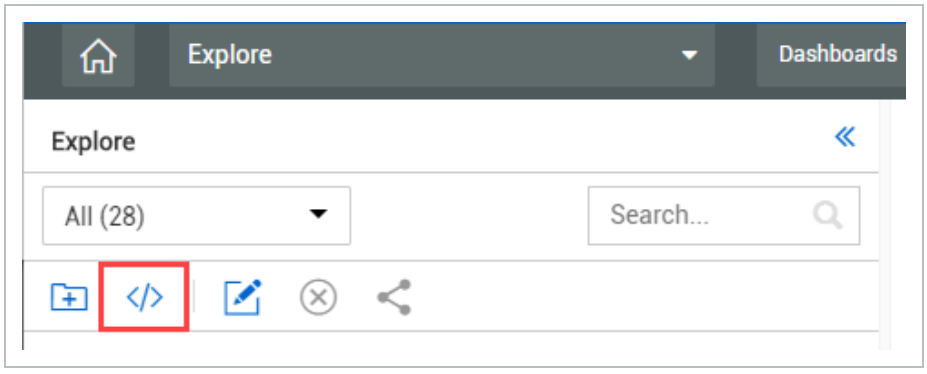
1.5.5 Embed External Content

Embedding external content in InEight Explore means you can expose dashboards you have on your Power BI service or Tableau server in the InEight Explore application.

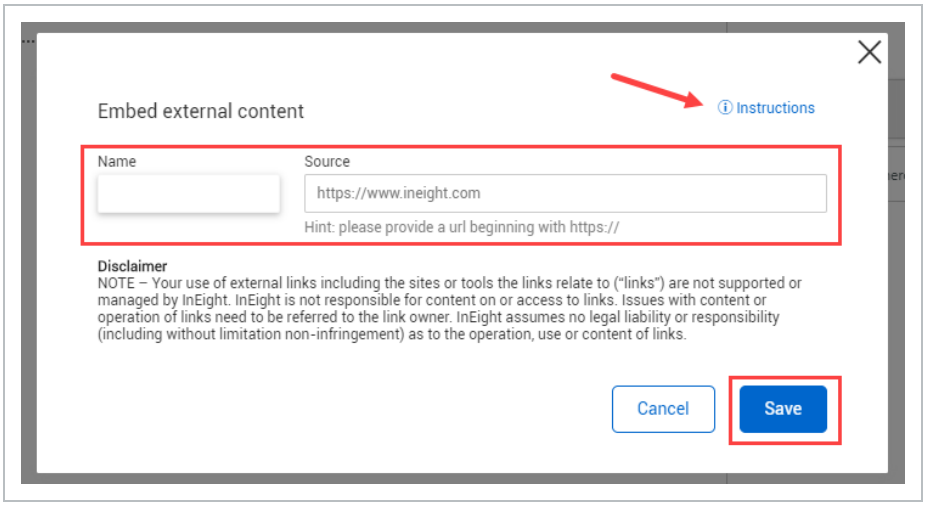
While your organization is still responsible for maintaining security and maintenance of the dashboards and data behind them, you can have all your dashboards in one place and it eliminates the need to bounce around different windows to look at dashboards that may contain more than just InEight Application data.

Set-up Adding External Content

1. Click the **Add External Content** icon.

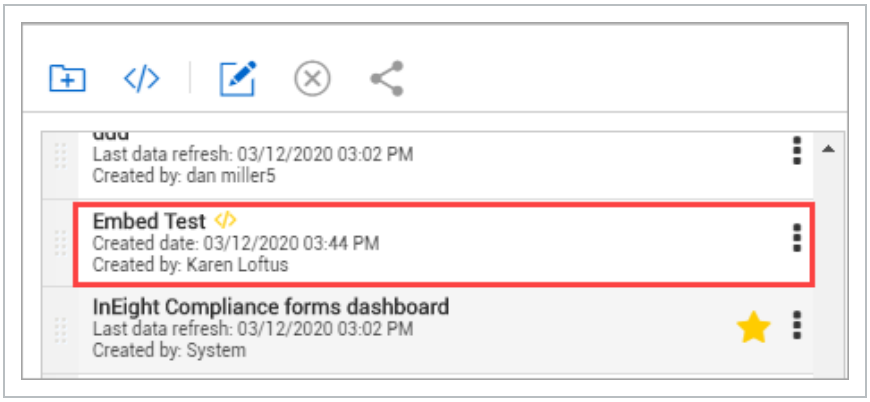


2. In the dialog box, add the **name** for the new report, in addition to the **Source** for the external content.
3. Click **Save**.



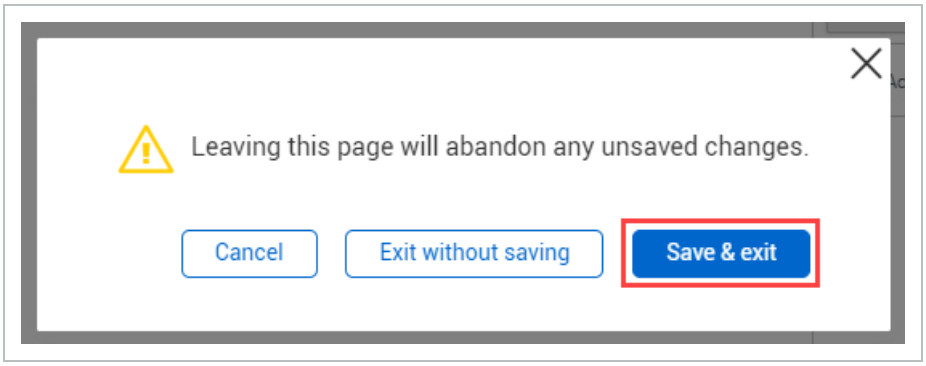
Click the **Instruction** icon to be taken to the Guide for embedding content in Explore.

- The resulting saved report appears alphabetically in your list of reports. The External Content identifier is also shown.

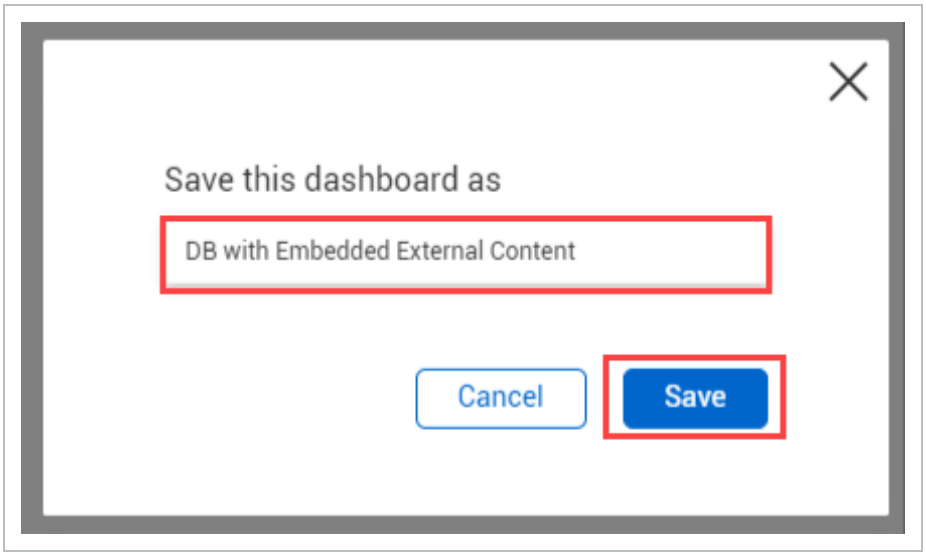


- Clicking on this dashboard takes you to the https:// Source page shown above

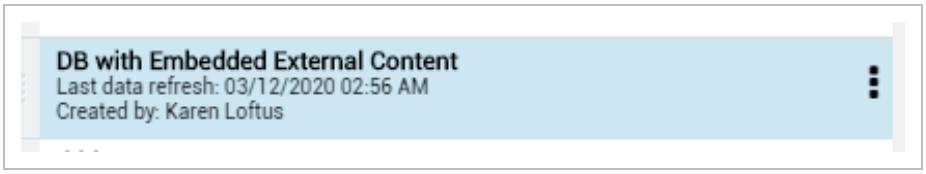
4. Before leaving the page, and in the event you need to save this new report, click the **Save & Exit** button.



5. This allows you to type in a **dashboard name**, and then click **Save**.



6. Search for the resulting dashboard, again alphabetically.



1.5.5.1 Deleting an Embedded Dashboard

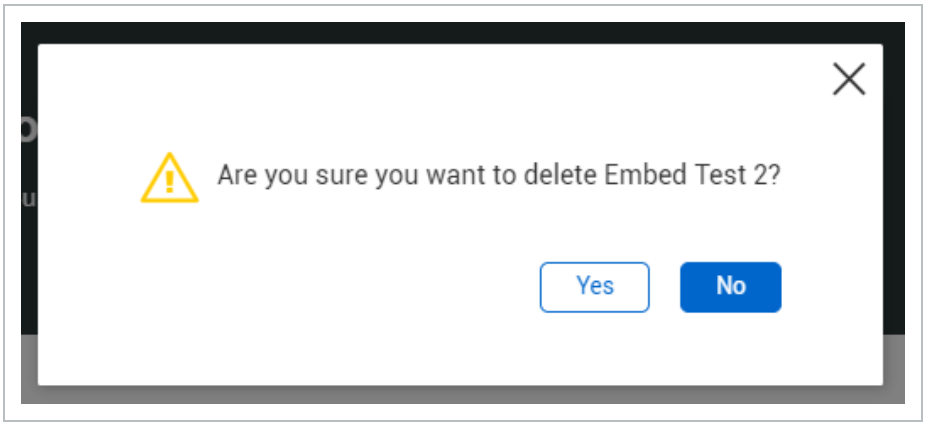
As with other dashboards, dashboards with embedded external content can be deleted.

Delete an Embedded Dashboard

1. From the list of dashboards, click on the desired dashboard to delete.
2. Click the **Delete Dashboard** icon.



3. You will be asked to confirm the deletion. Click **Yes**.

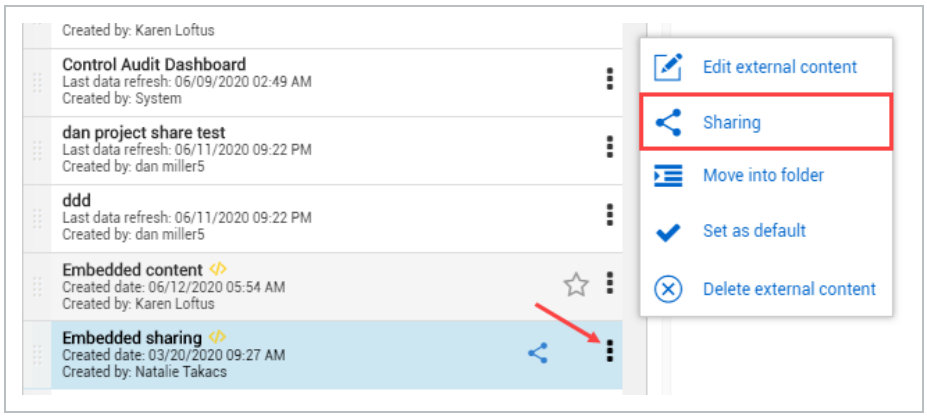


1.5.6 Share External Content

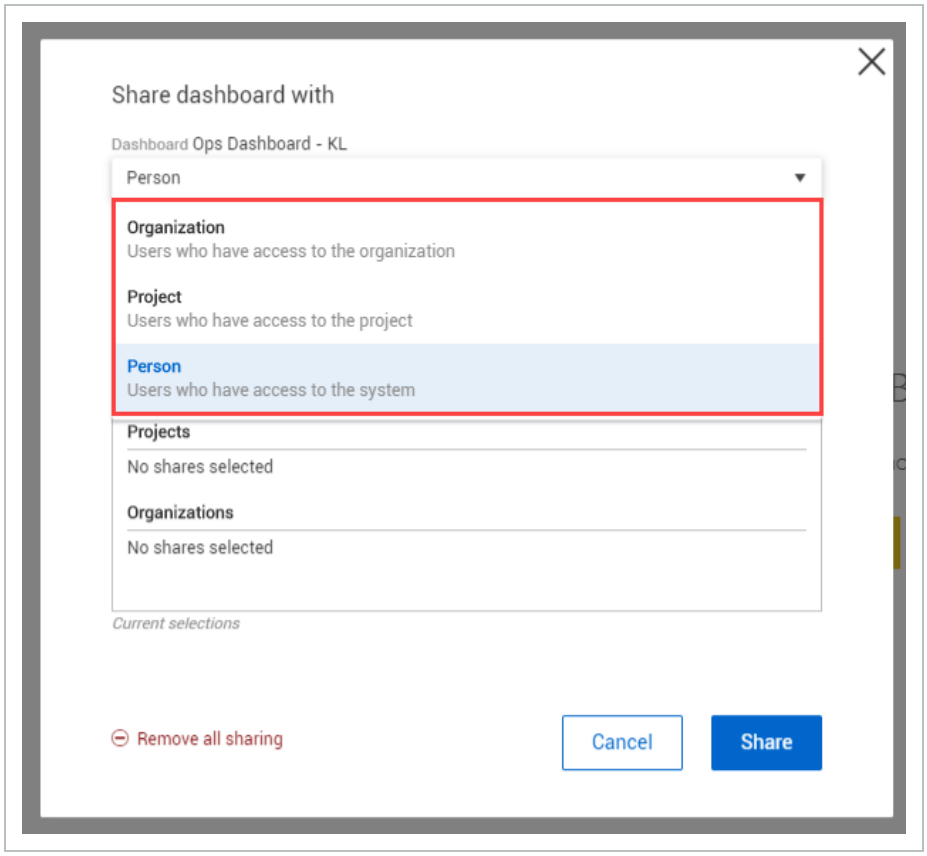
Sharing embedded content allows you to have one place to view all reporting and ensures that everyone in your organization is looking at the same reporting.

Share External Content with Others

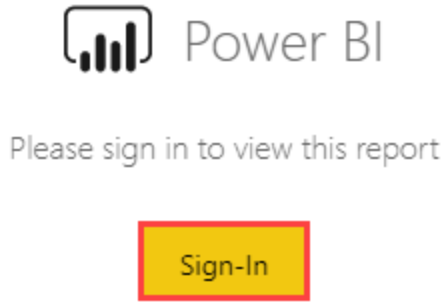
1. To share external content that you have already embedded into Explore, click the **Sharing** icon, and then the **vertical ellipses** for the external content.



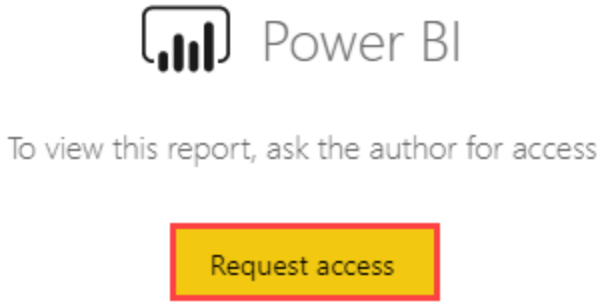
2. Then in the dialog box, select the appropriate Organization, Project or Person from the drop-down list to apply sharing.



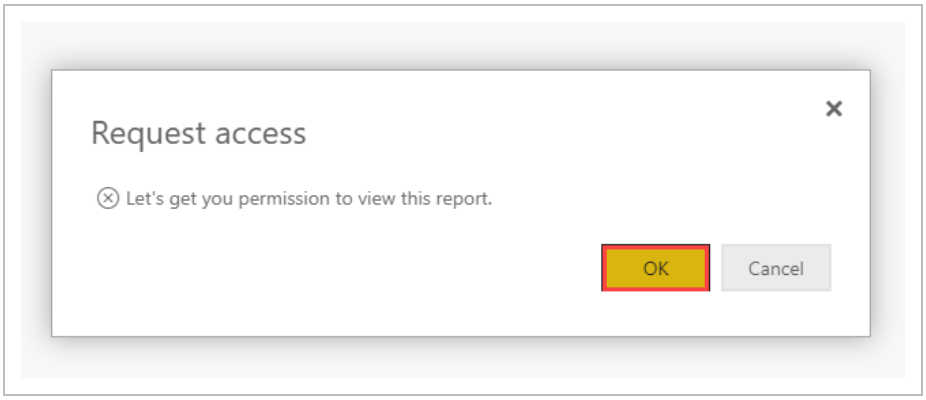
3. When a dashboard is shared with you, if you already have a Power BI login, click **Sign-In**.



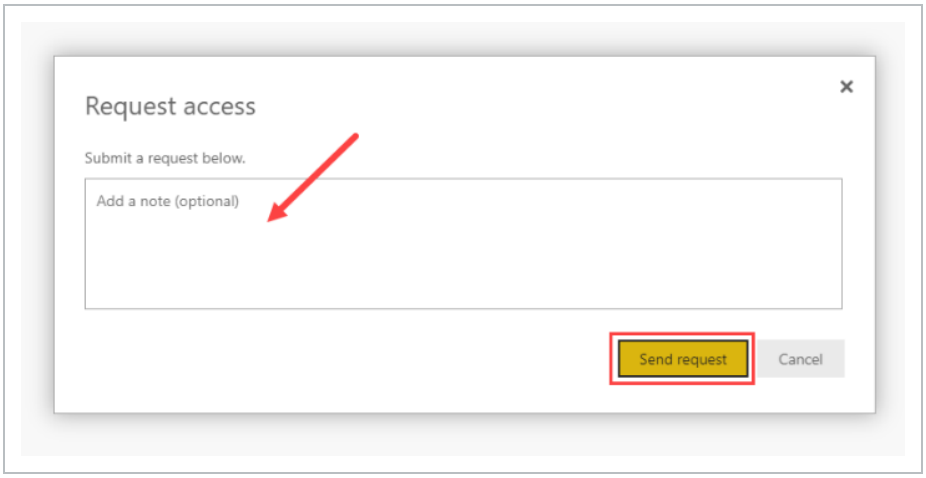
4. To request access to a shared report, click the **Request access** button.



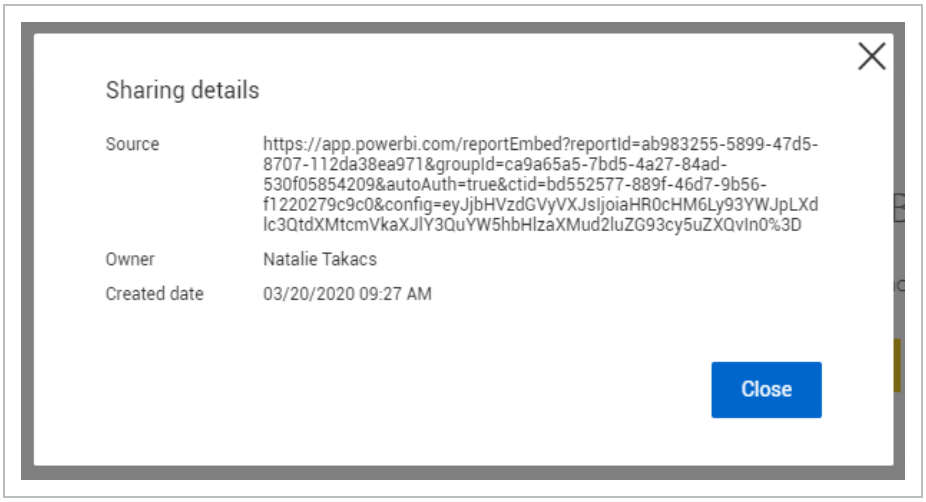
5. Depending on your authorization level, you may get another dialog box to request access. Click **OK**.



6. You can add a personal note, and then click **Send request**.



Clicking the **Sharing** icon of any dashboard that has been shared with you results in a dialog box indicating the source, owner and created date for the share.

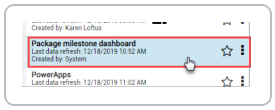


1.6 DASHBOARD EXAMPLES

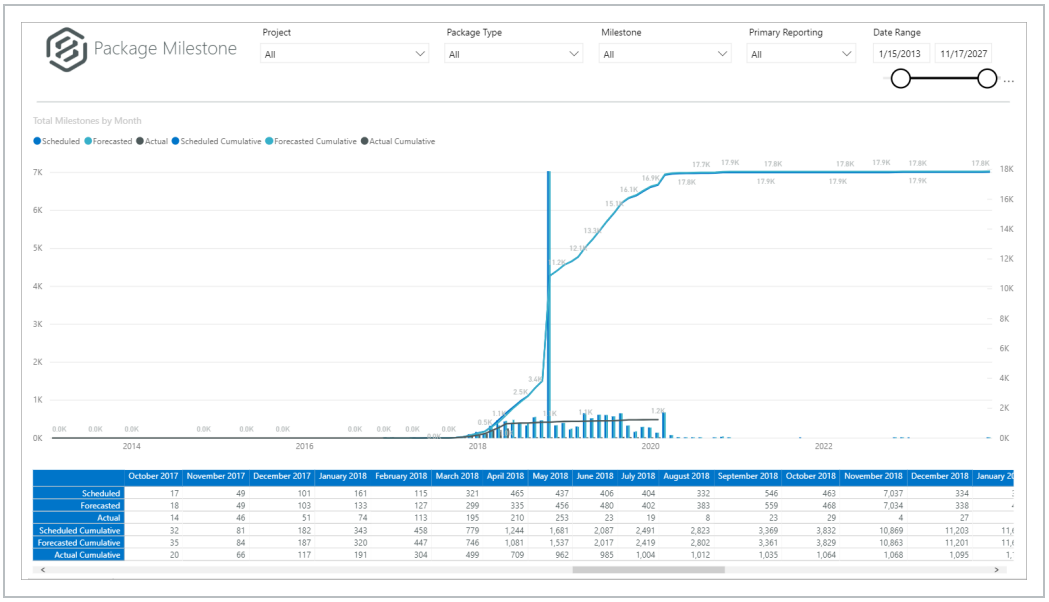
The Package Milestone dashboard lets you see information about user-defined milestones in the procurement process over time. A second tab details bid package information at the line item level with the ability to link back to InEight products.

Package Milesetone Dashboard

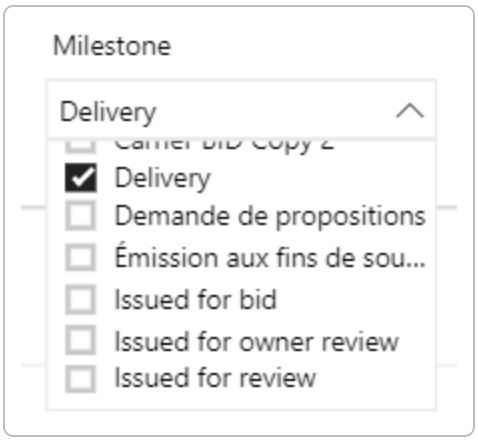
1. From the Dashboards page, click the **Package Milestone dashboard**.



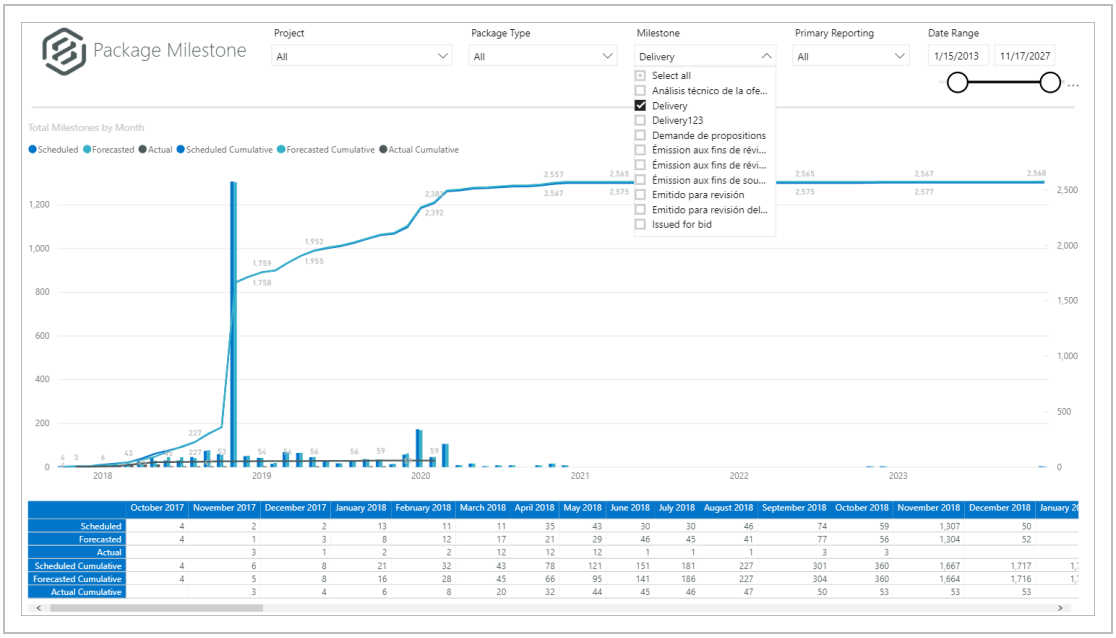
2. Select a **Project drop-down** title.
    - Note you may also scroll to search for a project or type in a project name in the search bar to select a project
3. Click **Select All**.
4. Close the Dashboards panel.
    - The summaries, graphs and data presented here are specific to this project
    - You should see the updated Package Milestone dashboard as shown below



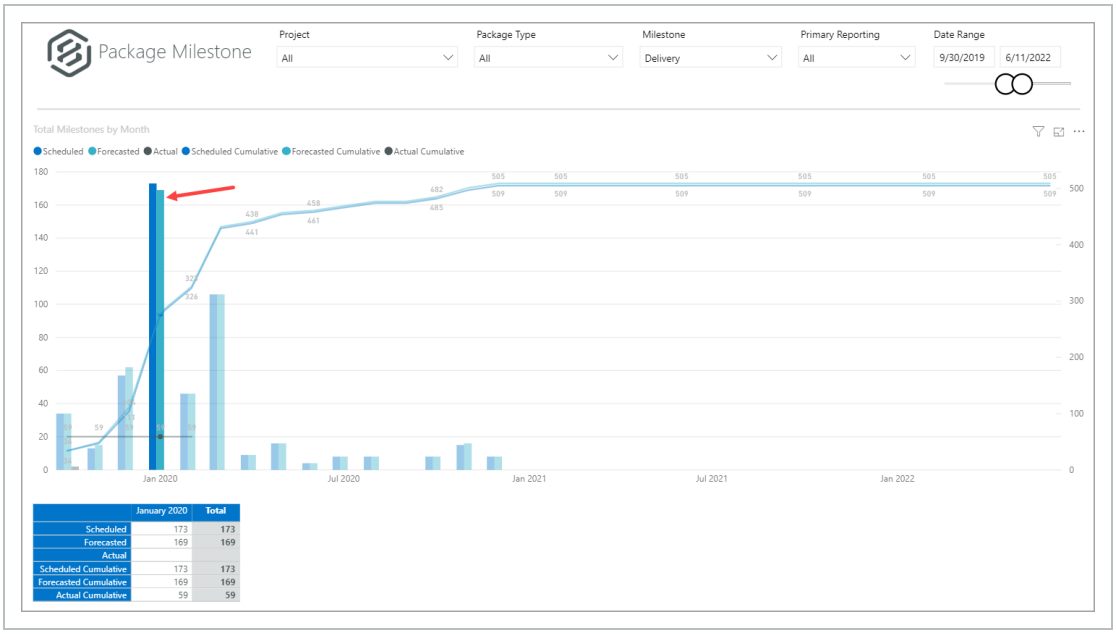
5. From the Milestone drop-down list, deselect all but the Delivery item.



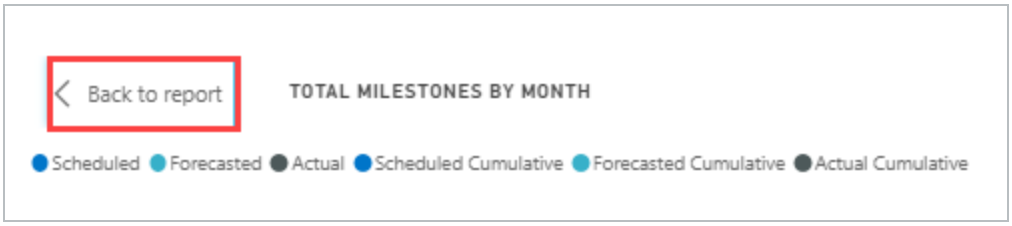
6. The graph now changes:



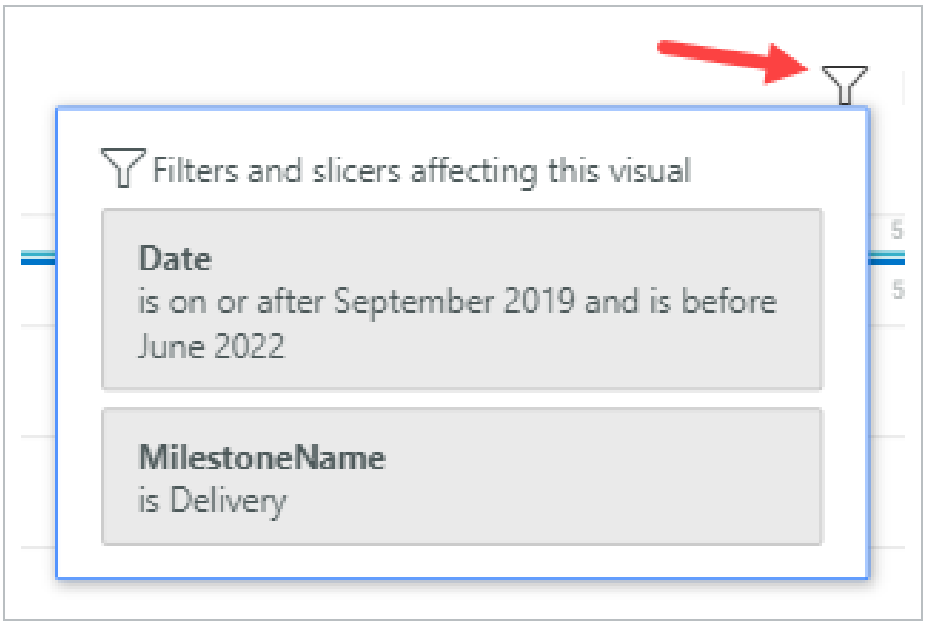
7. Change the Date Range to a shorter period of time.
8. Click the light blue colored **Forecasted Cumulative column for the tallest month**. Your report should look like something like this:



9. Click the **Focus** icon for a better view of the graph.
10. Click **< Back to Report** to return to the main view.



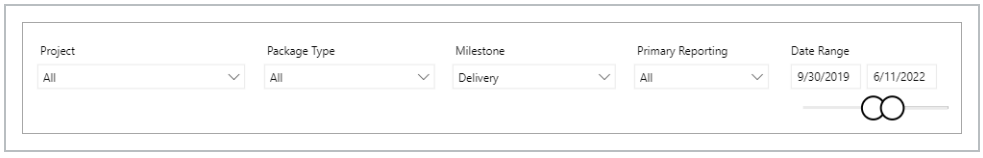
11. Click the **Filter** icon, on the upper right side of the graph.
12. Notice now the two filters that appear, Date and MilestoneName. Click **outside the box** to close the dialog box.



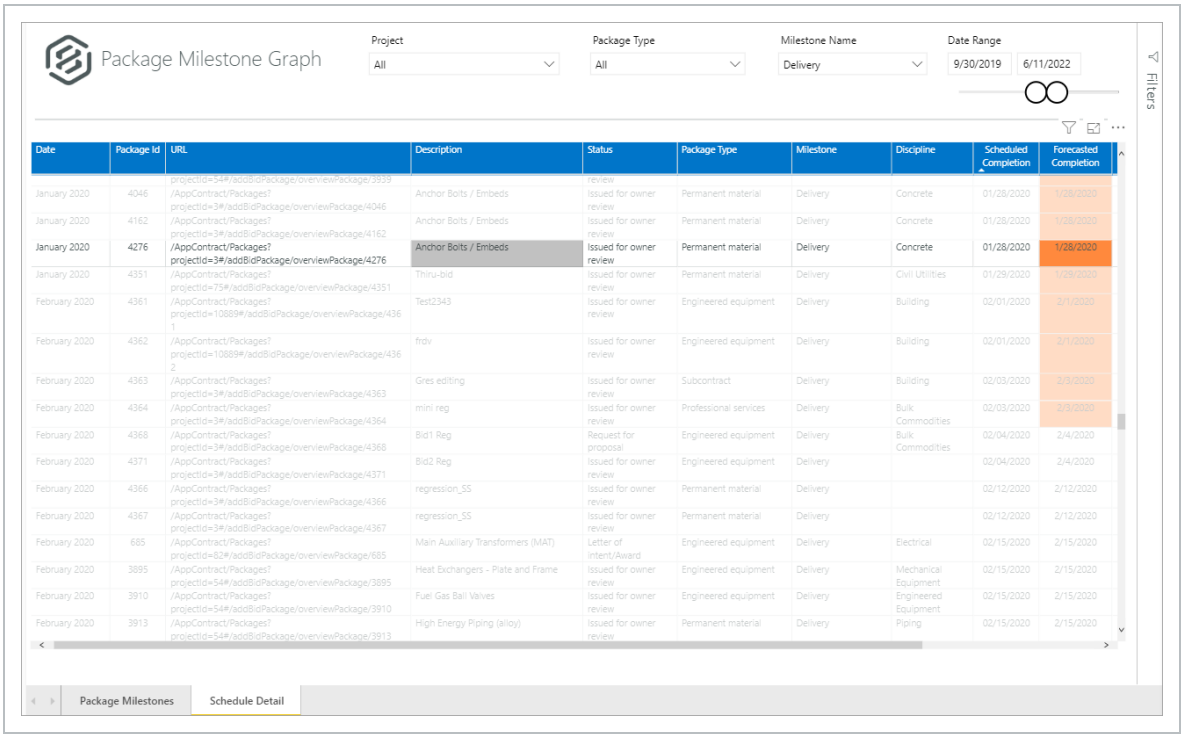
Package Milestone Header Values

The following table provides explanation of scheduled, forecasted, actual and cumulative (scheduled, forecasted and actual) packages at user-defined milestones.

Term	Definition
Project	Identifies the project.
Package Type	Identifies the project options.
Milestone	Identifies the user-defined step in the project.
Date Range	Dates, as selected in the calendar.



Click the **Schedule Detail** tab at the bottom of the page.



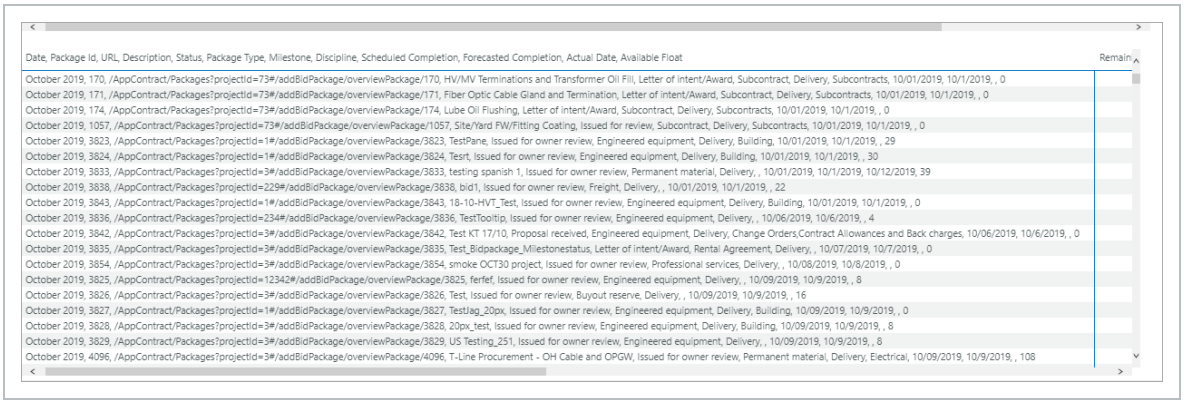
- In this view, line item level detail is available with the ability to link back to other InEight applications. Filtering, sorting and adjusting column width are options available for further ease in analysis.

Previewing Meta-data

Right-click on any header, and then select **Visual table** to view the meta-data further.



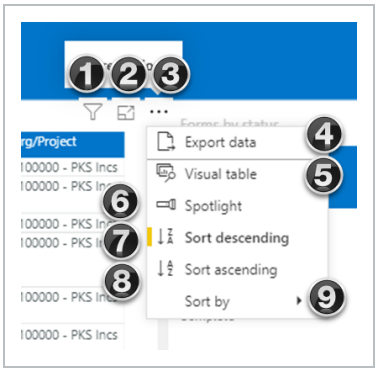
Detailed data will appear:



Press **<Back to report** to return to the default view.

While some dashboard graphs offer the ability to Drill Up, Drill Down, Go to the Next Level of the Hierarchy, and Expand all down one level in the Hierarchy, most other graphs include the following options:

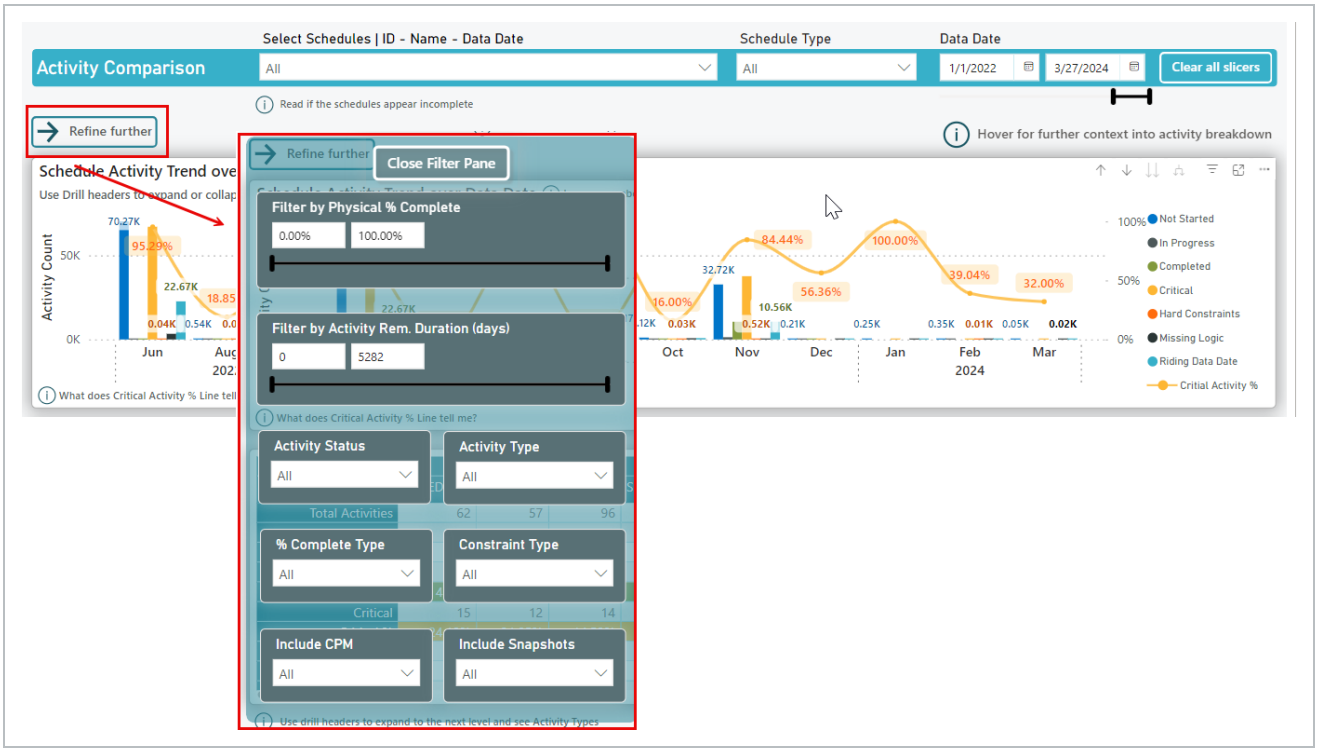
	Term	Definition
1	Filter	Filters and slices data in a visual.
2	Focus mode	Expand one visual in the dashboard.
3	More options	Opens additional options.
4	Export Data	Export data only to Excel (not visuals).
5	Show as a Table	Shows data/chart in a larger view.
6	Spotlight	Focuses dashboard on one specific visual.
7	Sort descending	Sort data in descending order.
8	Sort ascending	Sort data in ascending order.
9	Sort by	Allows you to sort by status or form.



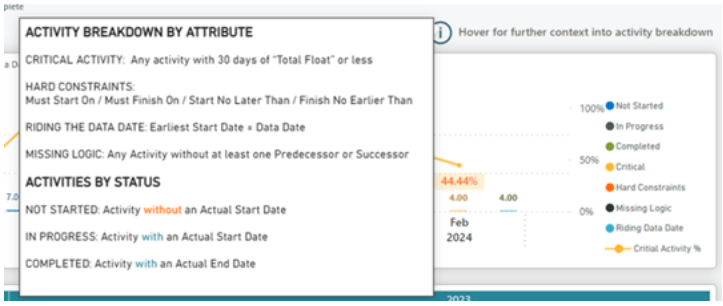
1.6.1 Schedule Dashboard

The Schedule dashboard lets you compare schedule and activity comparisons, perform float analysis, view resources, risk information and metric quality assessments.

To access, click on the schedule dashboard from the dashboard list. The **Refine further** icon opens a collapsible filtering pane with additional filtering criteria. To apply filters and close the side out, click the **Close Filter Pane.**



Click any of the Information icons placed throughout the tabs of the dashboard to provide you with additional context to the data that is being shown.



Preset tabs are as follows:

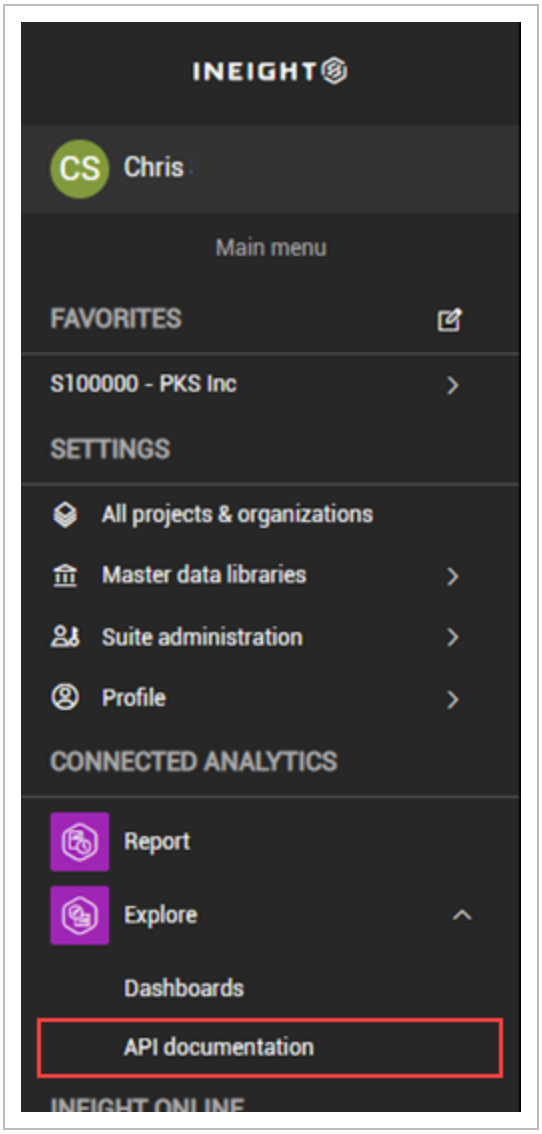
- Activity Comparison
- Schedule Comparison
- Float Analysis
- Resource Overview
- Risk Overview

- Risk Analysis
- Opportunity Analysis
- Event Register
- Mitigation Details
- Schedule Quality

1.7 API DOCUMENTATION

1.7.1 API Documentation Overview

From the home landing page, click the **Main menu** icon (), and then click Explore > **API Documentation**.



A new browser window opens to the InEight Knowledge Library Explore Resources tab. In the API Documentation section under the InEight product are the documents that represent each data endpoint InEight offers for self-service reporting.

To access a report, in the API Documentation section, click the + icon for the product to expand the list, and then select a file name. The document opens in a new browser window. Each API document includes an Overview of the selected API, a table of Relationships and Dependencies, Details, Supported Filters, API Fields and Field Descriptions, along with a Sample and Data Validation when applicable.

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CHAPTER 2 – CUSTOM DASHBOARDS

2.1 CUSTOM DASHBOARDS

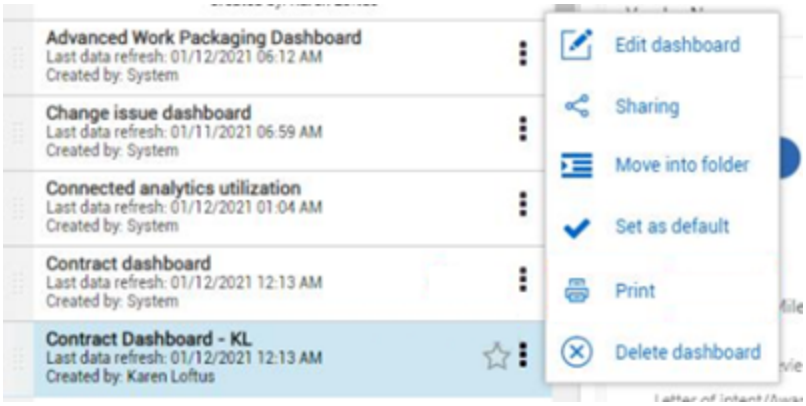
In Explore, you can edit the standard dashboards in order to create new custom dashboards and visualizations by modifying standard dashboards to meet the needs of your project. You cannot create dashboards from scratch, but you can edit the standard dashboards and save them as new custom dashboards.

2.1.1 Edit Dashboard

The following steps walk you through how to edit an existing dashboard to create a new dashboard.

Edit a dashboard

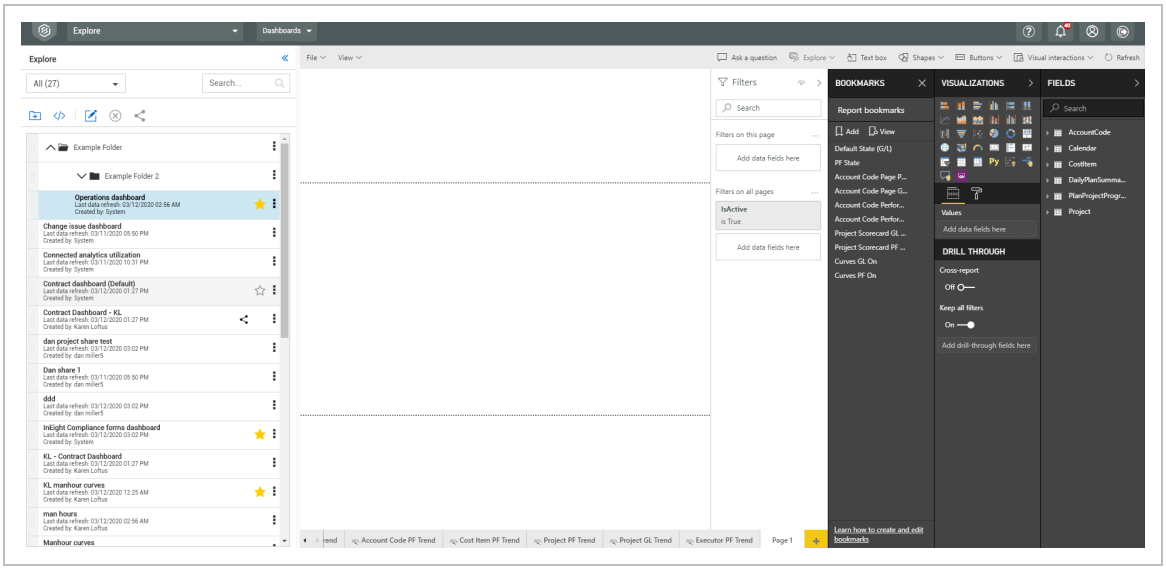
1. From the Dashboards page, click the **Context menu** ellipses next to the Operations dashboard.
2. Select **Edit dashboard**.



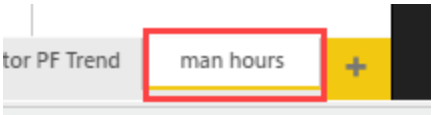
3. The Visualization and Fields slide-out panels open on the right side of the screen.
    - A yellow New page icon appears next to the page number at the bottom of the screen
4. Click the **New page** icon to add a new tab.



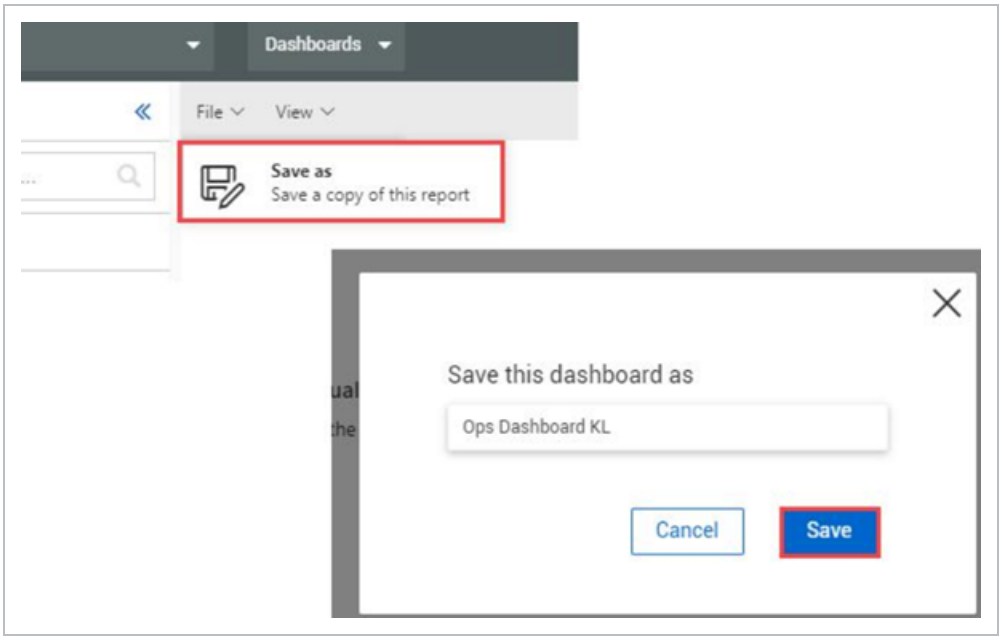
- Your screen will now look something like this



5. Double-click on the default page name and type in **man hours**.
    - Your tab will now look like this:



6. From the drop-down menu, click File > **Save as**.



7. In the dialog box, name the custom dashboard, and then click **Save**.

2.1.2 Dashboard Customization

From the Visualizations and Fields slide-out panels, you can add chart, graph and card visualizations to your dashboard and populate them with the appropriate data fields.

You cannot change the data source for the dashboard. The dashboard comes pre-connected to a dataset you may use to edit or add visualizations and filters.

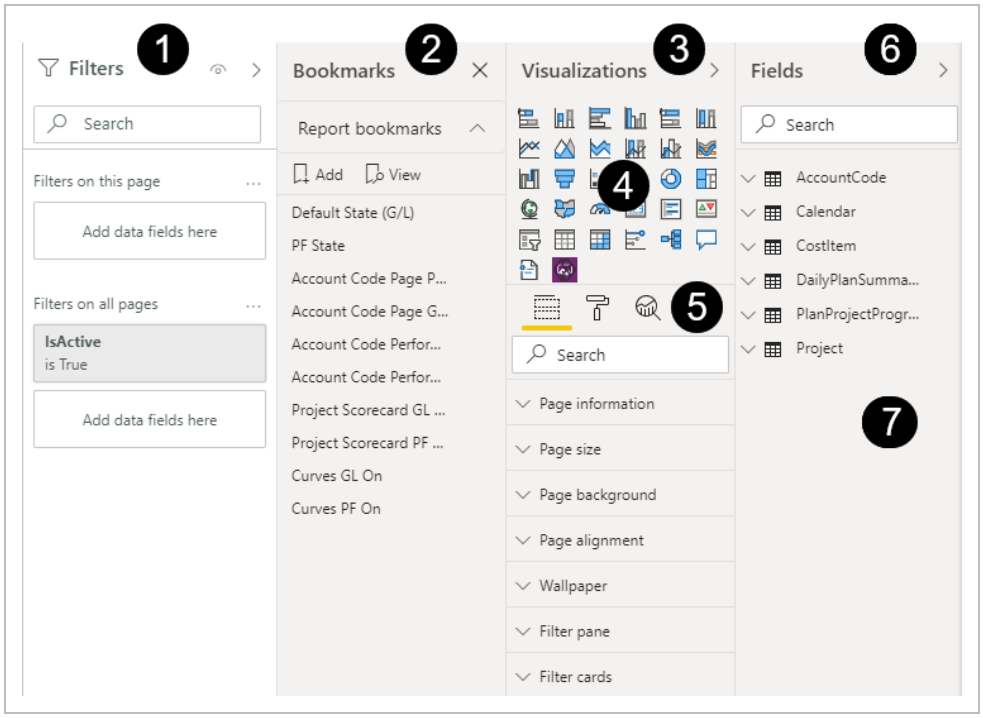
Visualizations and Field slide-out panels are utilized for the following unique purposes:

Overview - Filters, Bookmarks, Visualizations and Fields Slide-Out Panels

	Term	Definition
1	Filters slide-out panel	Various ways to cut the data using selections from the Fields slide-out.
2	Bookmarks slide-out panel	Customizable saved dashboard views to quickly access frequent dashboards.
3	Visualizations slide-out panel	Charts, Graphs, and Cards selection for dashboard tab.

Overview - Filters, Bookmarks, Visualizations and Fields Slide-Out Panels (continued)

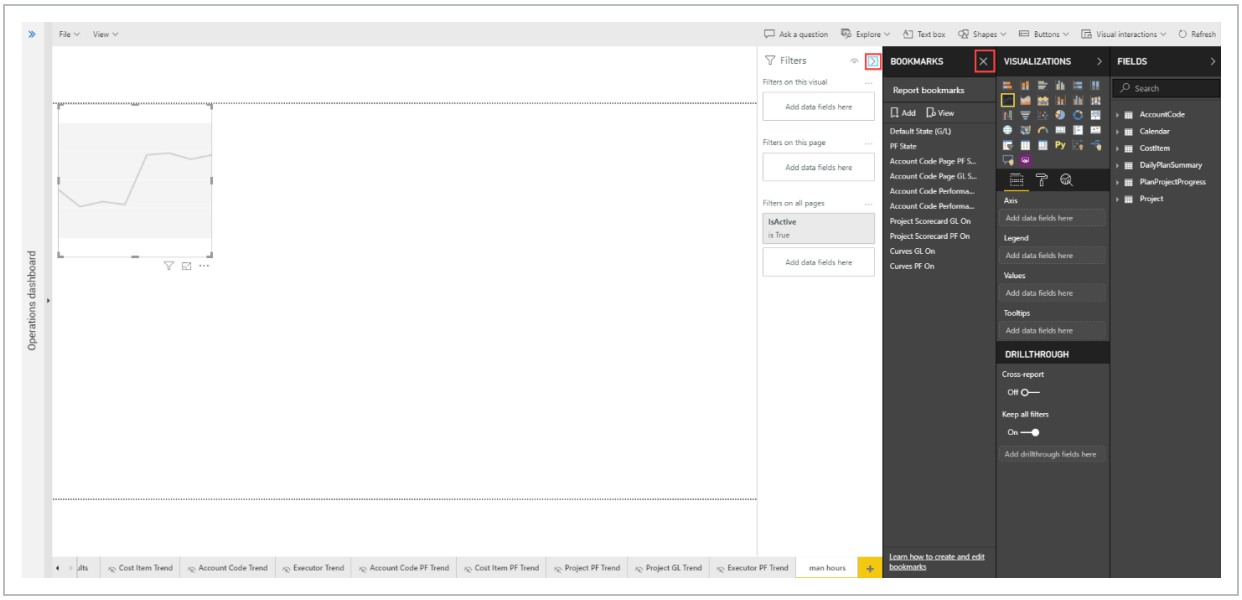
	Term	Definition
4	Charts/Graphs	Various charts, graphs, an PowerApps for PowerBI.
5	Fields, Format, Analytics	**Format** provides page information. **Fields** allows for adding value data fields and drill through capability. **Analytics** modifies the lines (min, max, average, etc.) shown in the selected chart or graph.
6	Fields slide-out panel	Contains data fields to add to your visualizations to report on in your dashboard.
7	Data Fields	Data from InEight Project Suite to add to fields such as Axis, Legend, Values, etc. under the Visualizations slide-out panel.



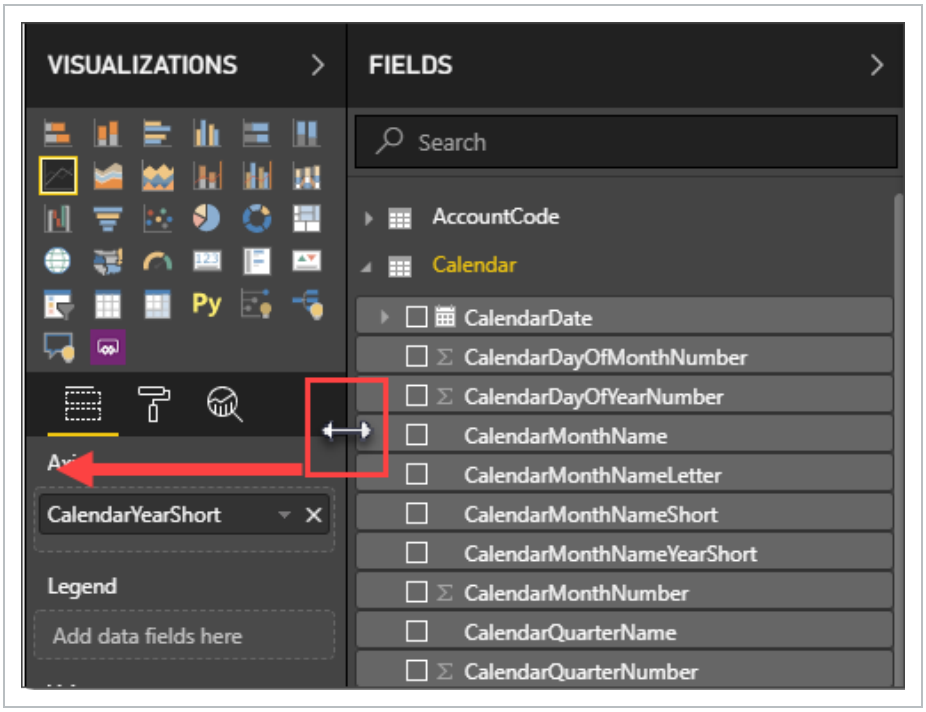
The following Step by Step walks you through adding a graph visualization to your dashboard reporting on Project Progress and man hours.

Create a graph

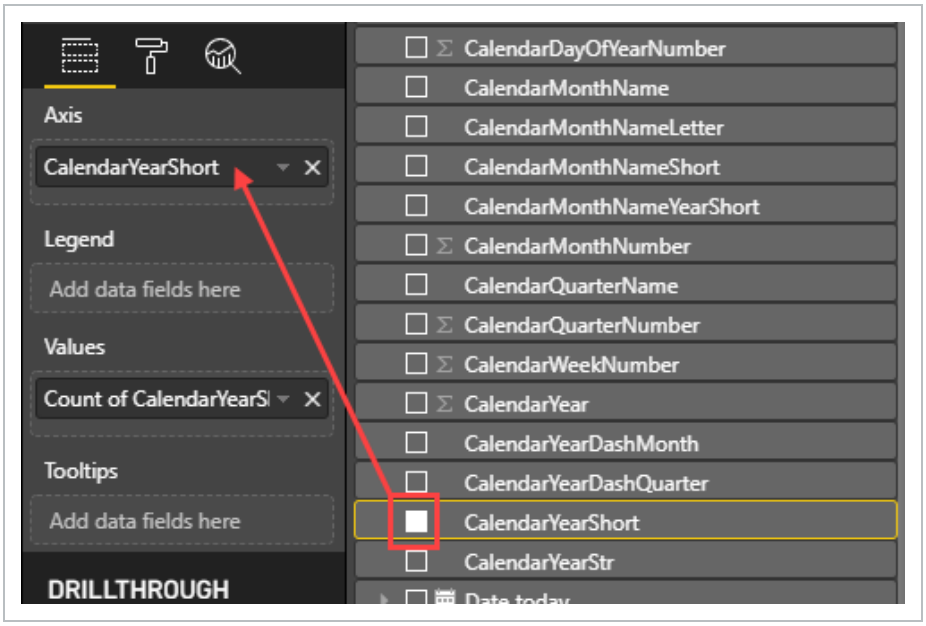
1. Under the tab you created in Step by Step above, on the Visualizations slide-out panel select the **Line chart** visualization.
2. To make more space, hide the **Dashboards** slide-out panel, **Filters** slide-out panel and close **Bookmarks**.



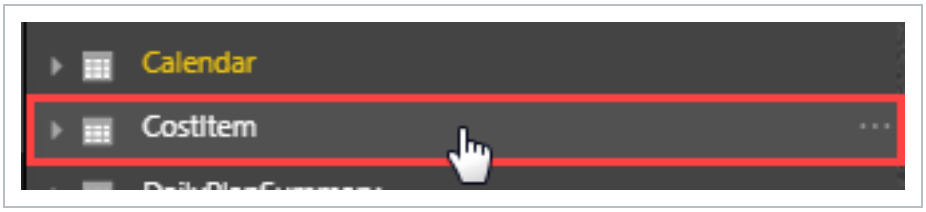
3. Enlarge the Fields slide-out panel by sliding the **left border** toward the left to increase the Fields selection area.



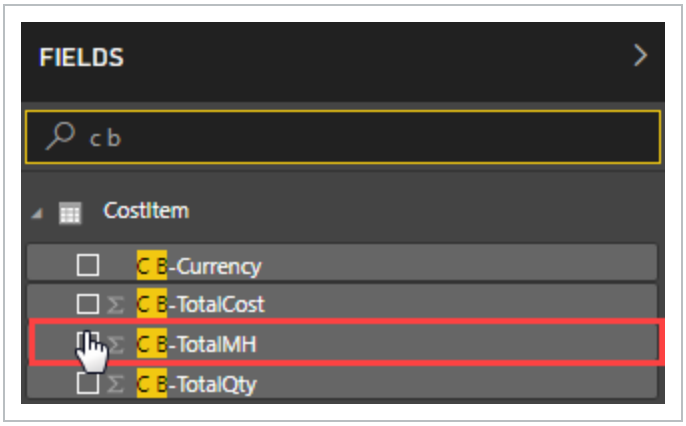
4. Under the Fields slide-out panel, navigate to the Calendar and click the **CalendarYearStr check box**, and the selection will populate in the Axis.



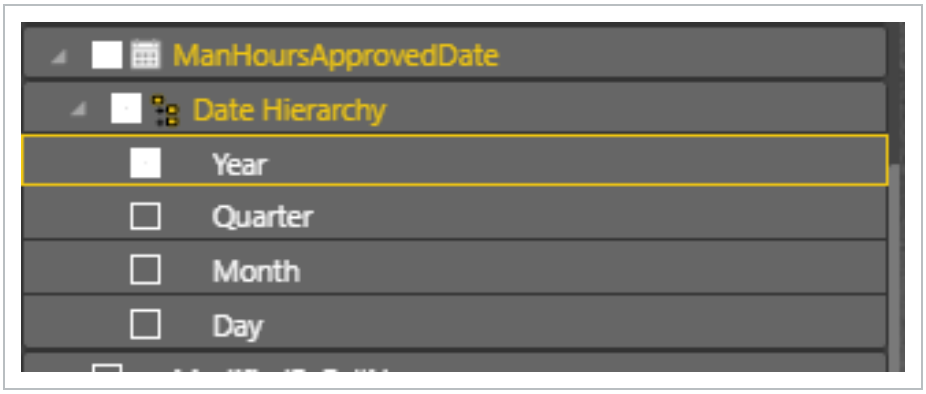
5. Close the Calendar Field and scroll down and open the **CostItem** Field side arrow.



6. In the Search bar under Fields type **C B-**.



7. Select the **C B – TotalMH check box** to add it to the Values section of the Visualizations slide-out.
8. Clear the Search bar and close the CostItem field.
9. Open the Daily Plan Summary Field and select **ManHoursApprovedDate**. Modify the Date Hierarchy to match this:



10. Close the DailyPlanSummary field.
11. Expand the graph size by pulling the lower right corner of the graph downward.
12. Open **PlanProjectProgress**and select the following fields:

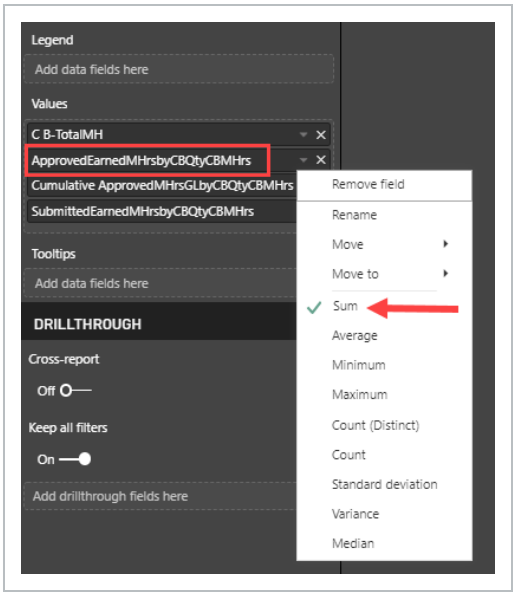
a. **ApprovedEarnedMHrsbyCBQtyCBMHrs**

b. **Cumulative ApprovedMHrsGLbyCBQtyCBMHrs**

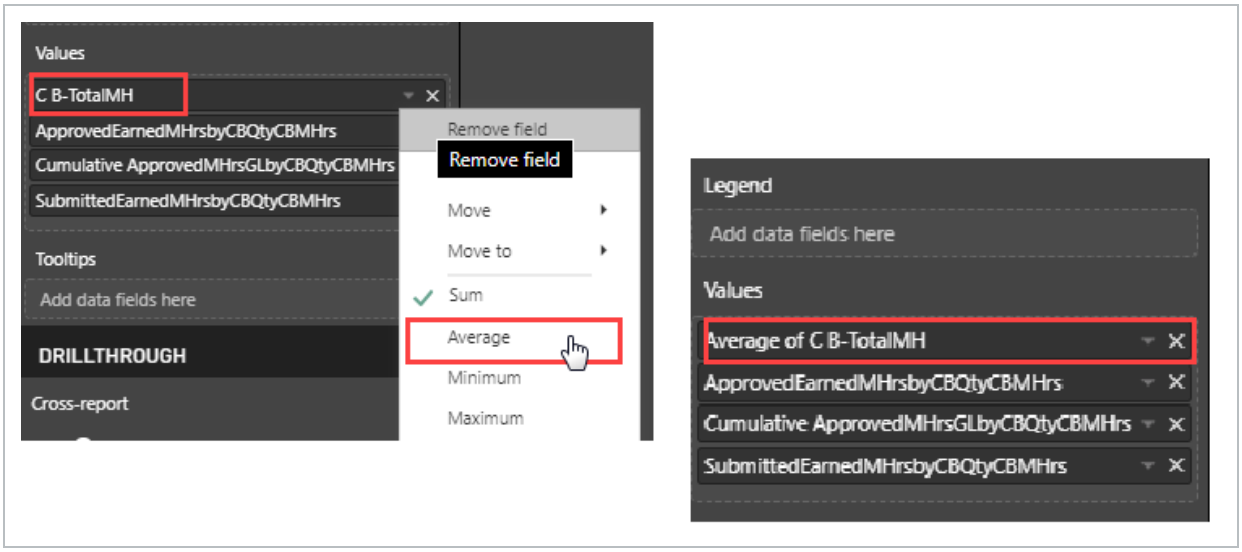
c. **SubmittedEarnedMHrsbyCBQtyCBMHrs**

- On the dashboard on the left, the graph displays your submitted earned man hours and compares that against approved earned man hours

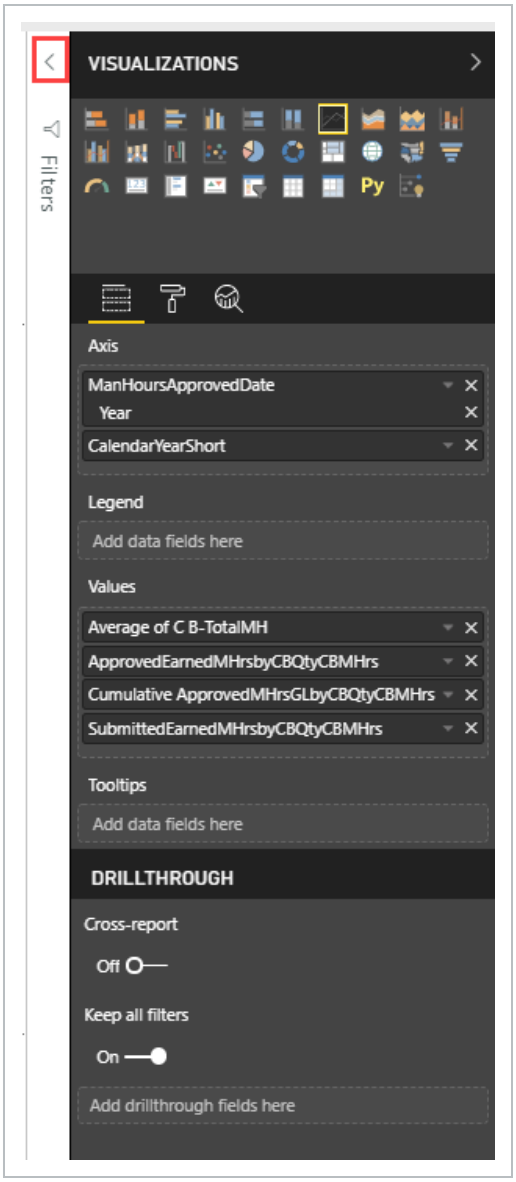
13. By clicking each **Values** drop-down fields, you will see each is intuitively using the mathematical sum function.



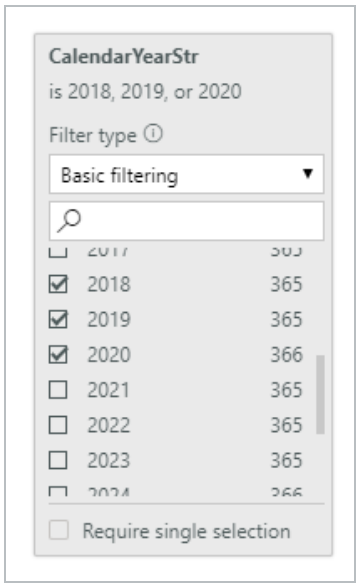
14. On the C B-TotalMH drop down, change the selection from Sum to **Average**. Notice how the field name changes.



15. Open the **Filter slide-out**.



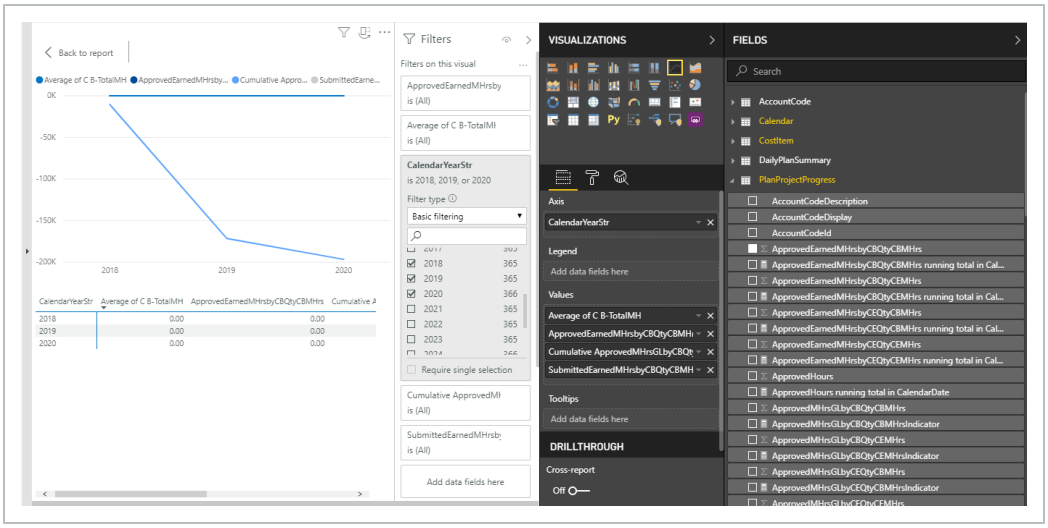
16. Expand the CalendarYearStr field by clicking on the **drop down**. Using Basic filtering, select years **2018, 2019 and 2020** to abbreviate the reporting years chart.



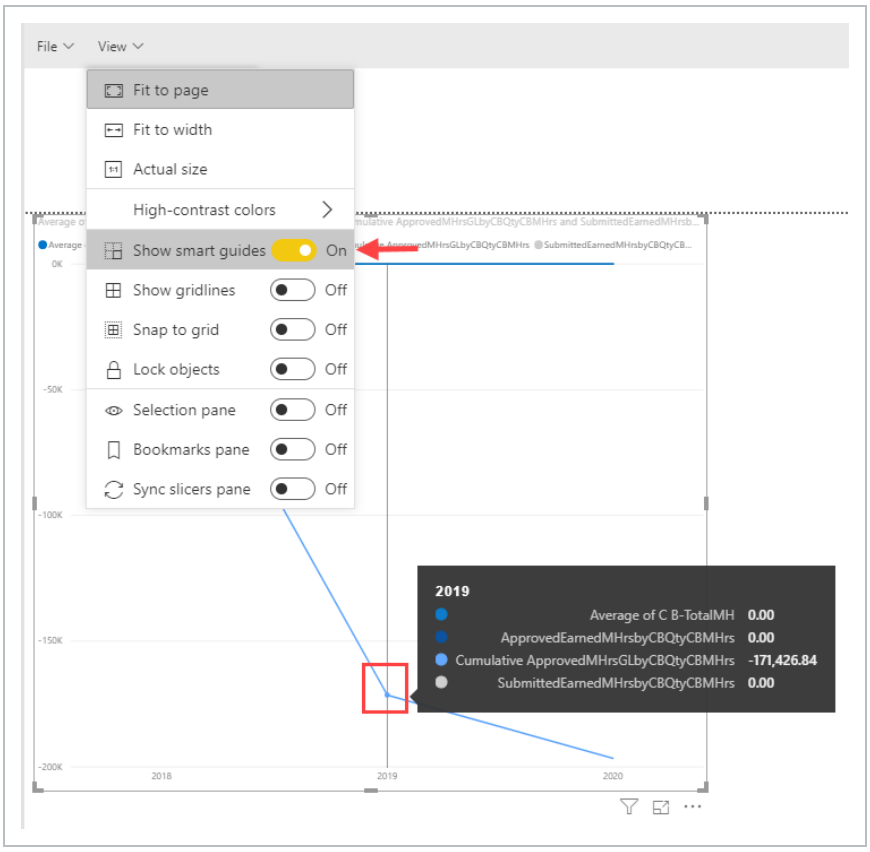
17. Right-click inside your chart and select **Visual table**.



- Your chart should look similar to this:



18. Click **< Back to Report**.
19. In the upper left corner, note the View options available in the drop-down. Change the Show smart guides toggle to **On**.
    - Doing so makes a vertical bar appear each time it bisects a point in the graph
    - Clicking on the bisected point brings up the data, as shown below



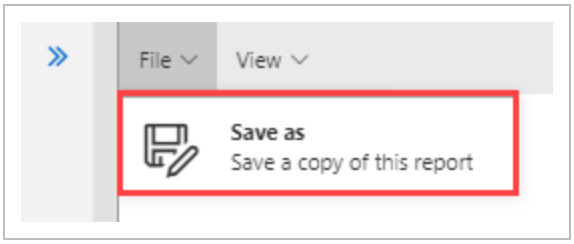
20. From the View drop-down, turn the Bookmarks Pane toggle to **On**.

2.1.3 Save Dashboard

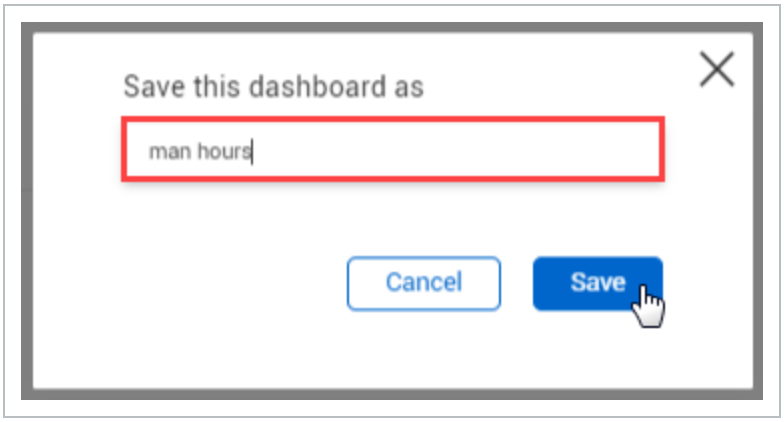
There are two ways to save a dashboard.

First, if you are leaving a newly created report where you have modified data, you will receive a pop-up where you can confirm your desire to save your change.

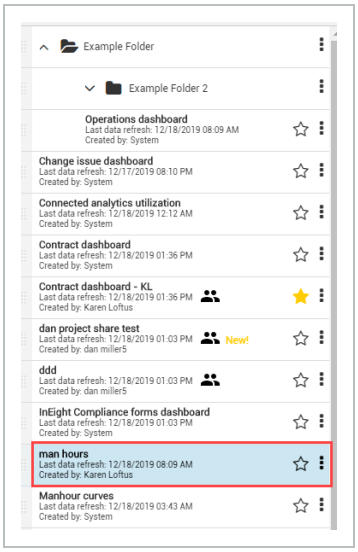
Click the **File > Save As** drop down.



If Yes in selected, save with a new dashboard name and click **Save**.



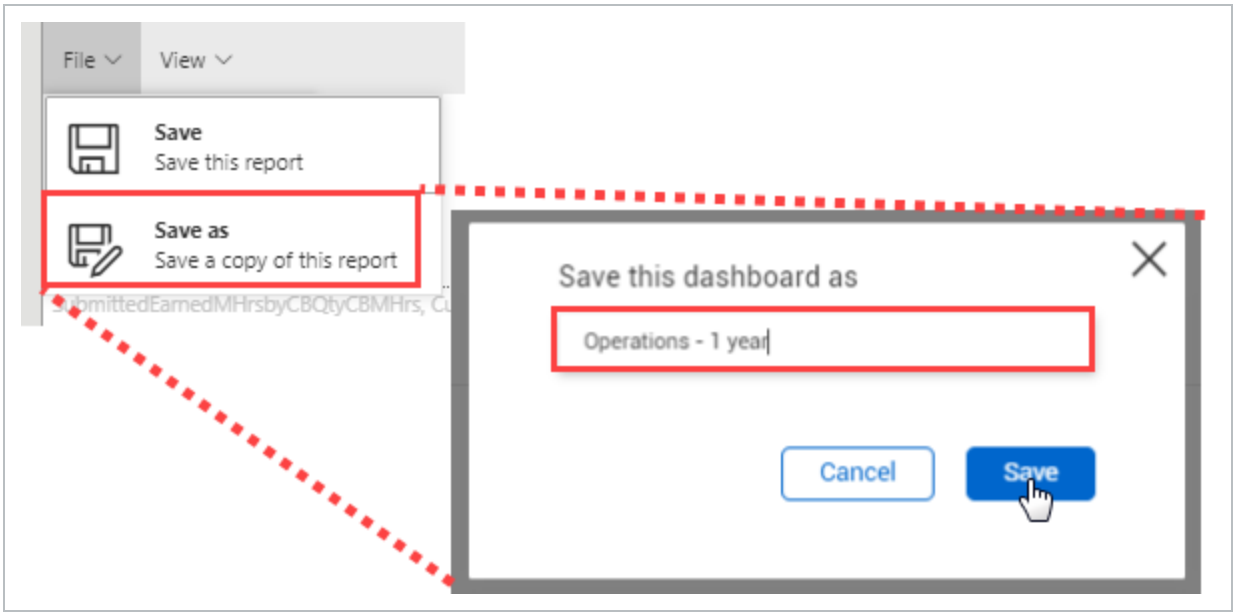
- Your dashboard will appear on the left slide-out panel alongside your other dashboard



Alternatively, if you are leaving an existing report where you have modified data, you will receive a pop-up where you can confirm your desire to save a copy of your change.

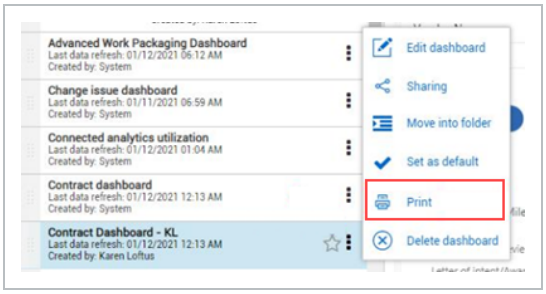
Click the **File > Save As** drop-down.

Add a name for the new dashboard and click **Save**.



2.1.4 Dashboard Printing

To print a dashboard, select the **three dot ellipses** next to a dashboard you created.



- The dashboard print settings will default the orientation to Portrait. At times, selecting Landscape will provide a more full page view

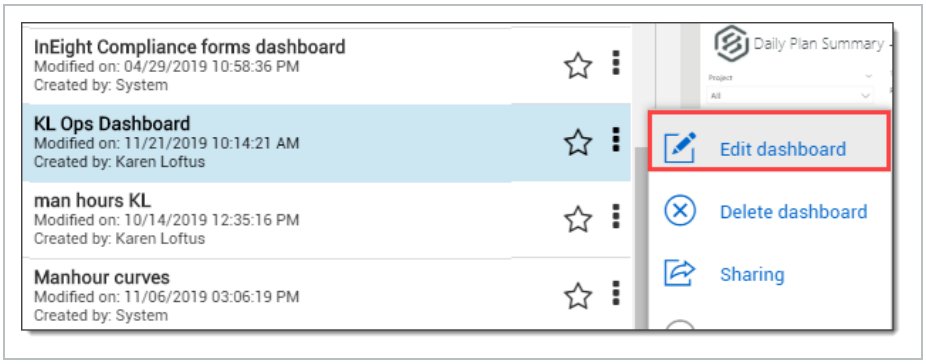
> To determine what fields are in a given report, click the Report, look at the Fields pull-out, and open the yellow colored drop-down. Search through the listing for the field(s) with a solid check-box.

2.1.5 Add a Bookmark

From an edited dashboard, you are able to further personalize your dashboard by adding a new field. In our example, Approver 1, Ajay GK is a frequent approver. We want to quickly view projects specific to him. We will do that by adding a new field onto the dashboard then adding a new Bookmark tied to him. That way, we can quickly see that view as easily as the default mode, or by clicking on other default Bookmarks. Let's see how we did it.

Add a bookmark

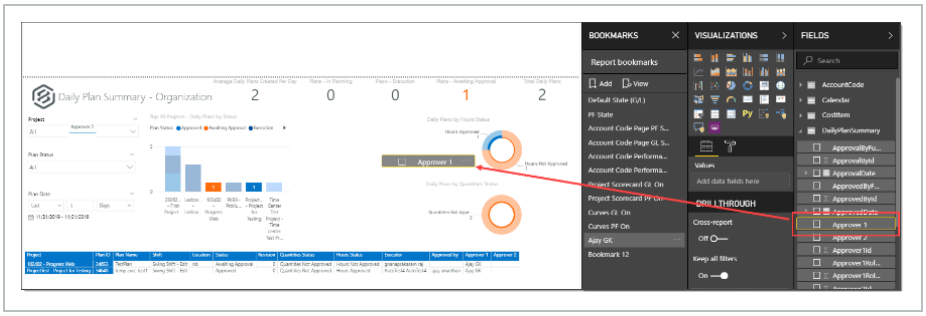
1. Ensure you are in the Edit dashboard mode of a saved, renamed dashboard.



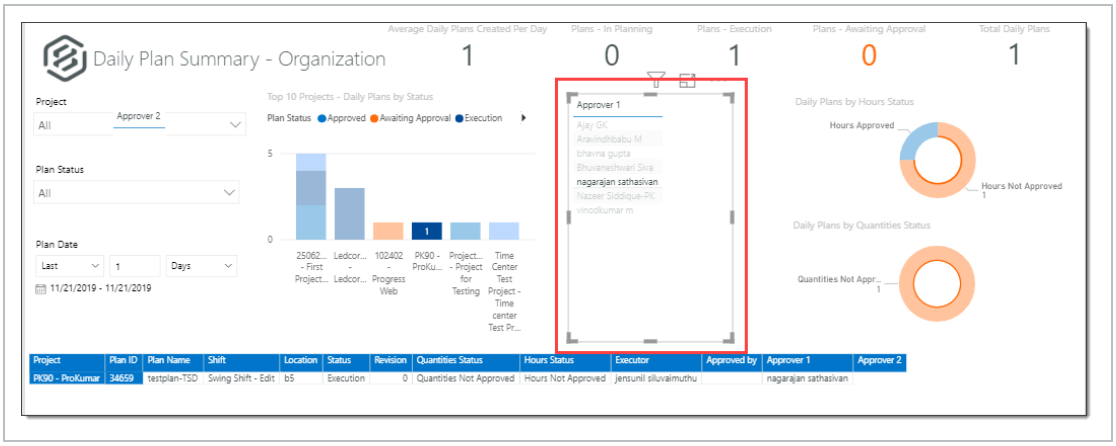
2. Close the Dashboard pane by clicking the **double blue arrows**.



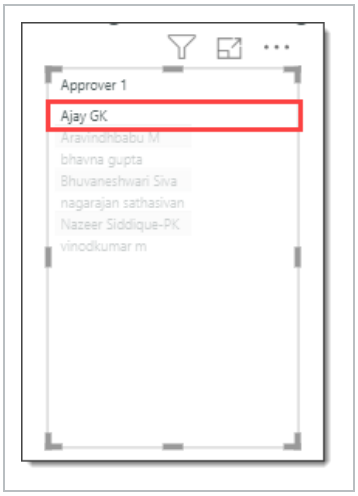
3. Search the Fields pane drop-down lists to locate the field to add, in our case under the DailyPlanSummary, we selected **Approver 1**.
4. **Drag that field** onto the dashboard.



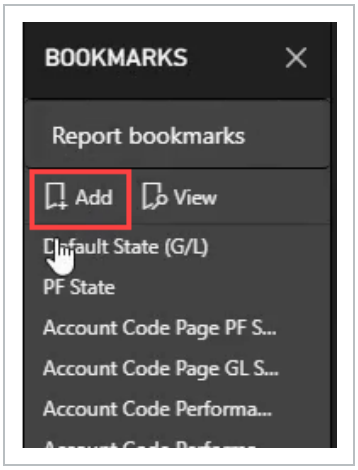
5. Using the gray colored handles that surround each attribute, move and re-size it and/or other attributes until the dashboard fits to your liking.



6. Highlight the desired Approver 1, in our case Ajay GK.



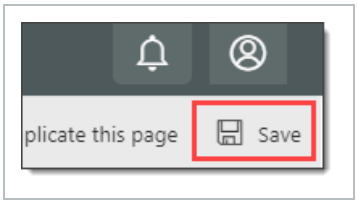
7. On the Bookmarks pane, click the **Add** icon, which will place a re-nameable bookmark at the bottom of the Bookmark pane.



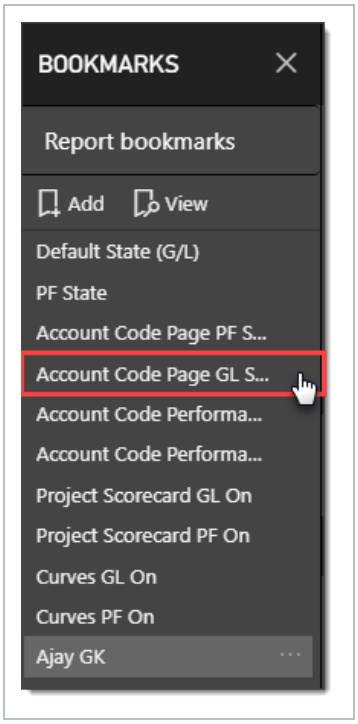
8. Double-click the **new Bookmark** to re-name it.



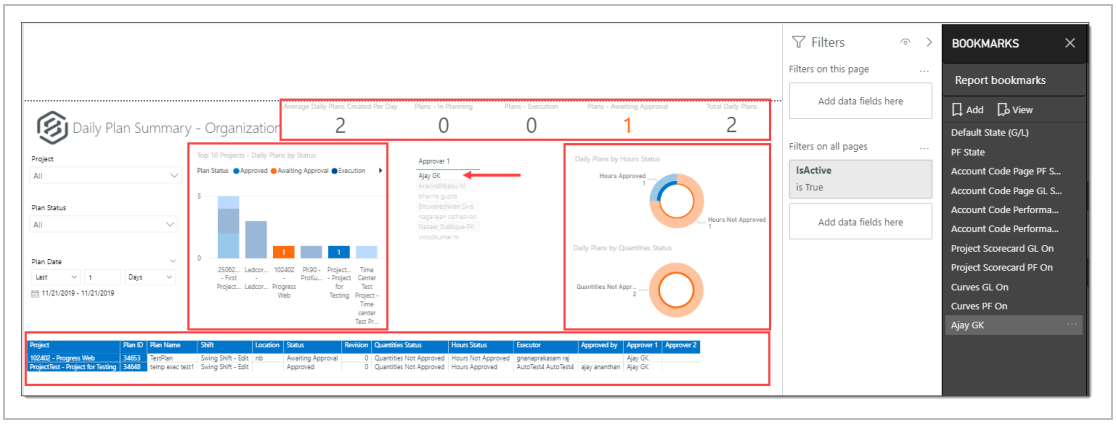
9. Save your dashboard by clicking the **Save** icon.



10. Toggle to another bookmark on the Bookmarks tab.



11. Then **toggle back** to your newly added Bookmark. Not only will that Approver 1 be selected, but all reports and data are filtered to those projects where he is the Approver 1.

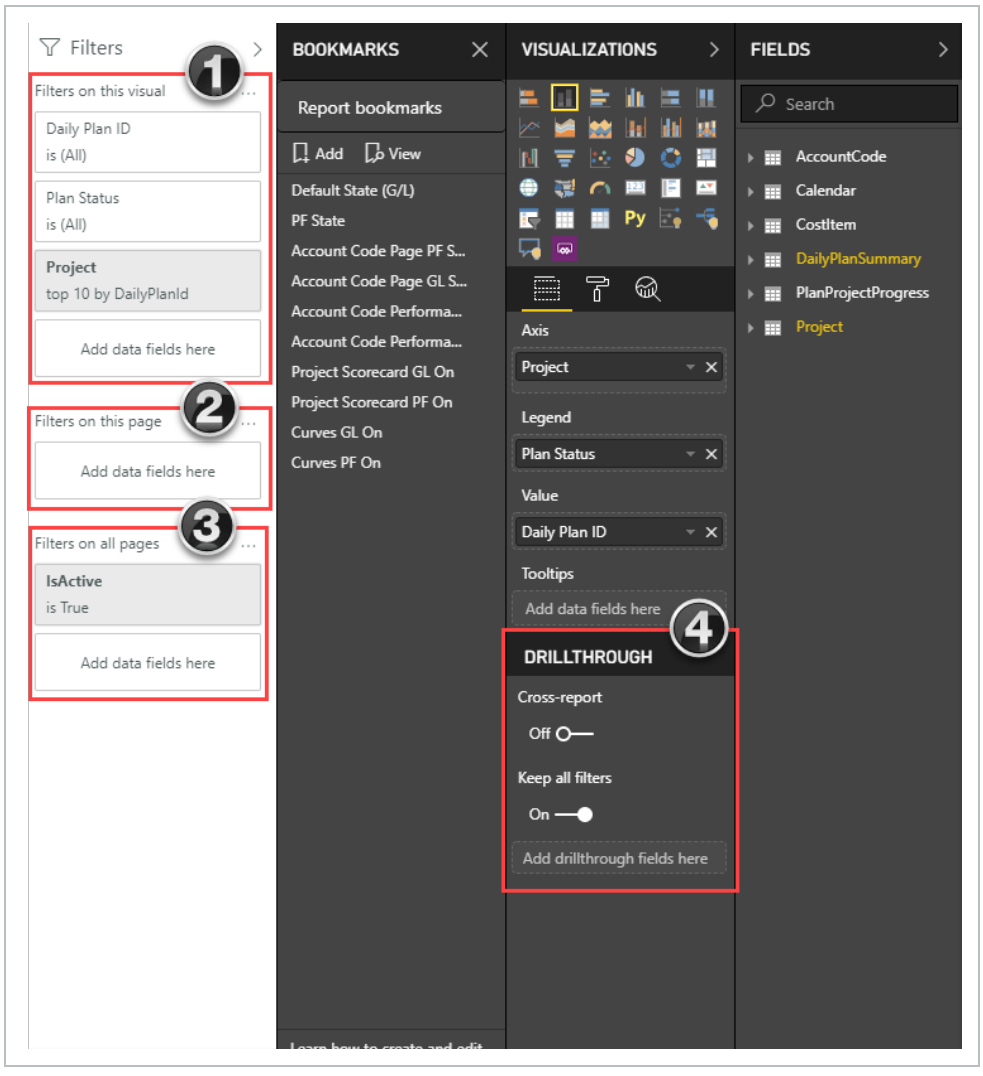


2.2 DASHBOARD FILTERING

The dashboards in Explore have advanced filtering abilities to make viewing easier and more customized.

You can filter the information on your dashboards on four different levels:

Filter	Definition
Visual Level	Filters a single visual on a dashboard. You can select the date range, account codes, approvers, etc. that you want shown.
Page Level	Filters all the visuals on a single page. You can use this to filter by areas on the project, date range, executor, etc.
Report Level	Filters all pages in a report. You can use this to filter a report by project, date range, remaining MHrs, etc.
Drillthrough	Used to focus on one aspect of the project. Any other page or visual that contains this drillthrough value can be redirected to this drillthrough page for a more focused and up-close view.



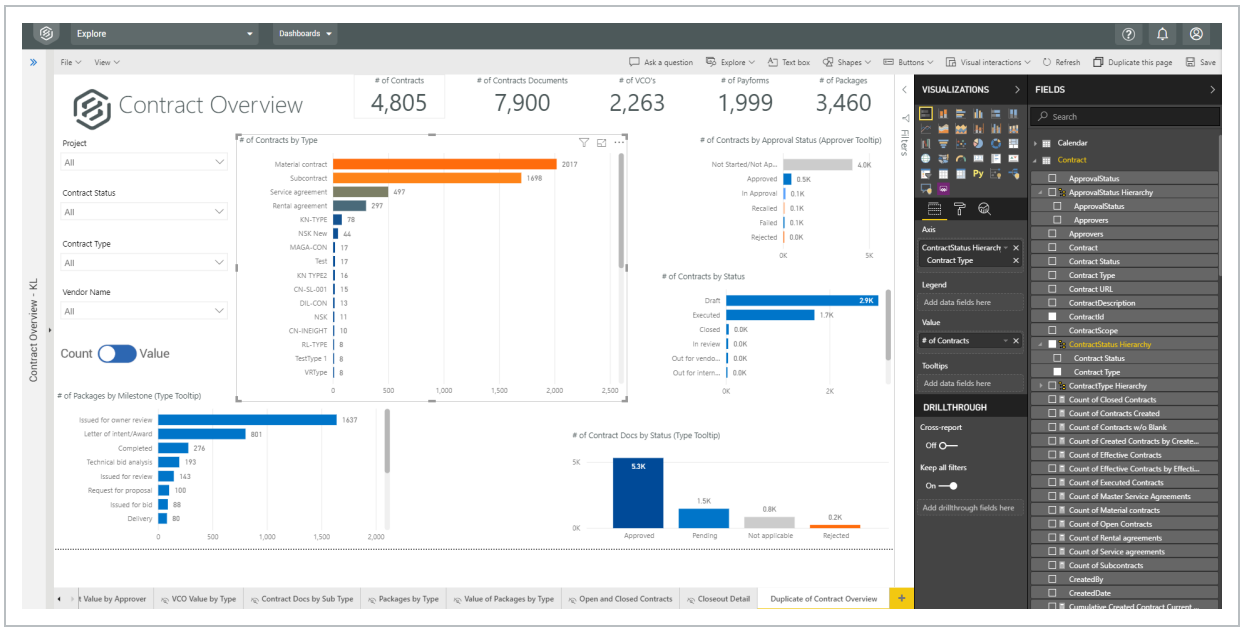
Drilling down on report data to the meta-data level, can assist in your analysis. Most of the visualizations on the dashboards display data at a summary level. Drilling down into the visualizations allows you to see the data at the detail level.

To enable us to view filtering and drill down data better, complete these preliminary steps.

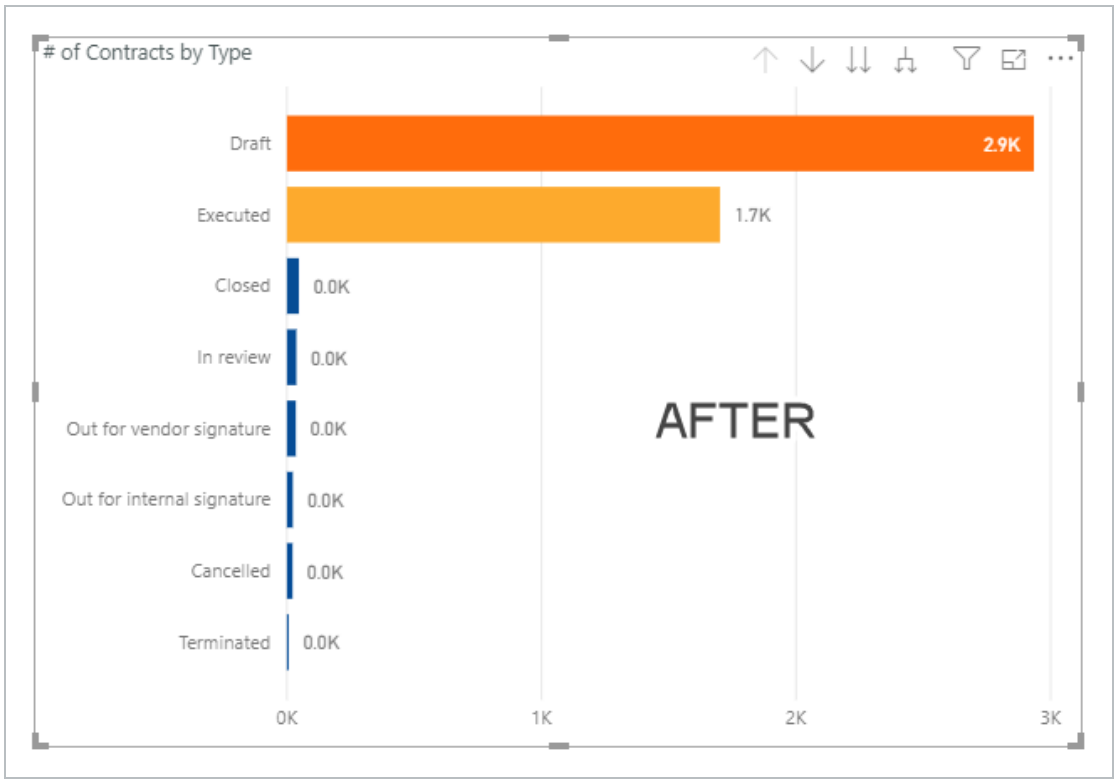
Filter a dashboard (part 1)

1. Navigate to the **Contract Dashboard**, and then select **Edit Dashboard** from the **Context Menu (…)** icon.
2. Save your new dashboard using File > Save As appending the Contract Dashboard file name with your initials.
3. Close the **Dashboards** and **Bookmarks** slide-out panels to give yourself more room to work.
4. Select a **Project**.
5. Select a Contract Status of **All**.
6. Select a Contract Type of **All**.
7. Select a Vendor Name of **All**.
8. Right-click on the Contract Overview tab, and then select **Duplicate Page**.
9. On the duplicate page, delete the following charts:
    - **# of Contracts by ERP Sync Status**
    - **# of VCO's by Status**
    - **# of Payforms by Request Status**
10. By either:
    - Clicking the **ellipses**, and then selecting **Remove**, or
    - Clicking on the chart, and then pressing the **Delete** button on your keyboard
11. Expand the width of the Fields panel.
12. Expand the # Contracts by Type chart.

13. Click on each remaining chart to view Fields used.



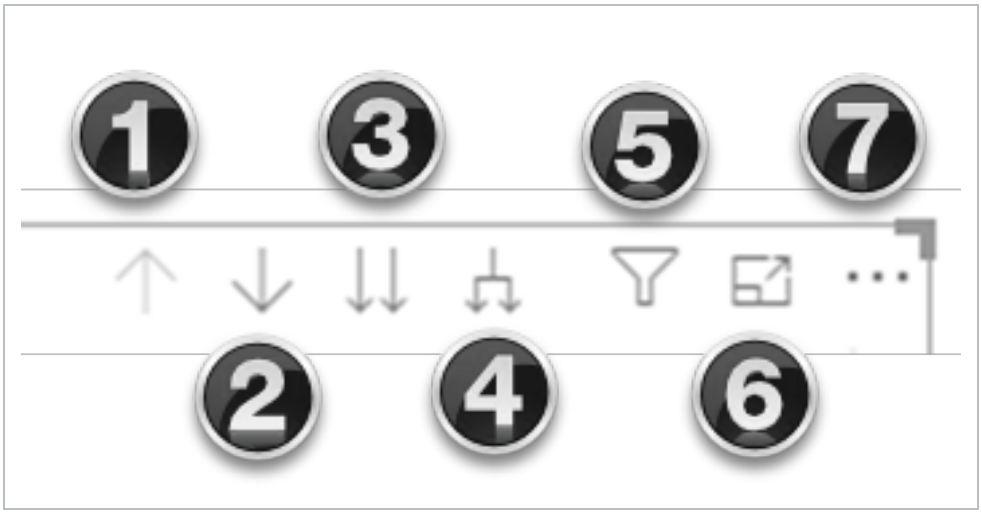
14. On the # Contract by Type chart, click the **Contracts** Field panel, and then add **Status Hierarchy > Contract Status**. Notice how the chart changes.



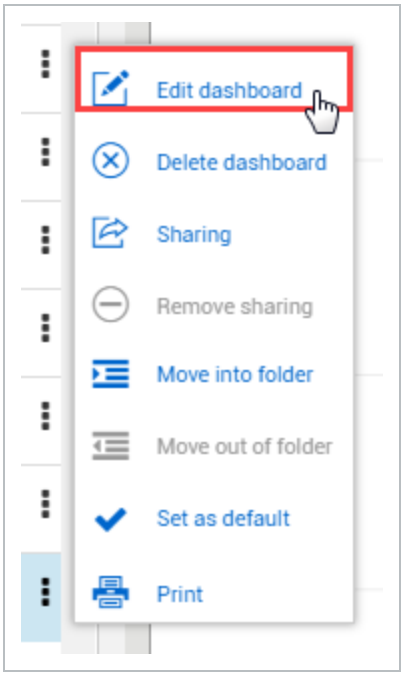
15. Specifically, with the field added, you now have greater ability to filter the data.

2.2.1 Filtering options

#	Filtering Option
1	Drill Up
2	Drill Down
3	Go to Next Level in the Hierarchy
4	Expand all Down one level in the Hierarchy
5	Filter
6	Focus Mode
7	More Options



Navigate to the dashboard that you just created and select **Edit dashboard** from the Context menu icon.

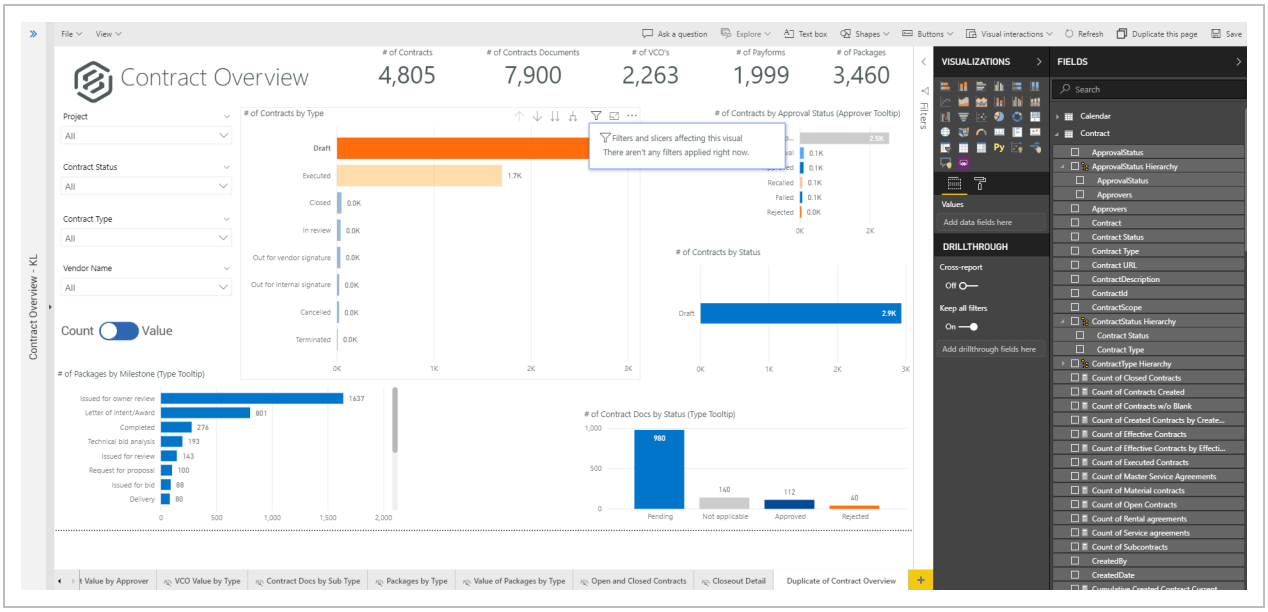


- Note the four types of filters:

Filter Type	Definition
1. Visual Level	Filters on an individual visual.
2. Page Level	Filters on every visual on the report page.
3. Report Level	Filters on all pages in the report.
4. Drillthrough	Filters on a single entity in the report.

For the remainder of this section, contract status data will be represented by the *# of* value. Alternatively, if the toggle was changed, all data would be shown by *Value*. Similar functioning toggles exist in other types of reports making it easier to view data in an alternate format.

Having followed the previous steps, your screen should now look similar to this:

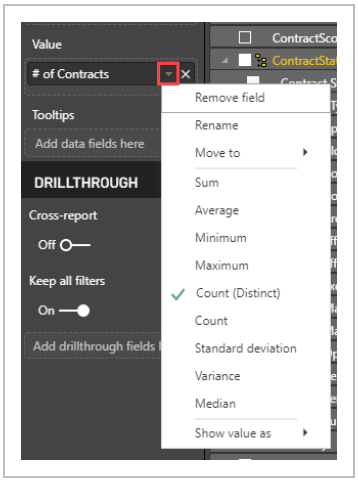


Filter a dashboard (part 2)

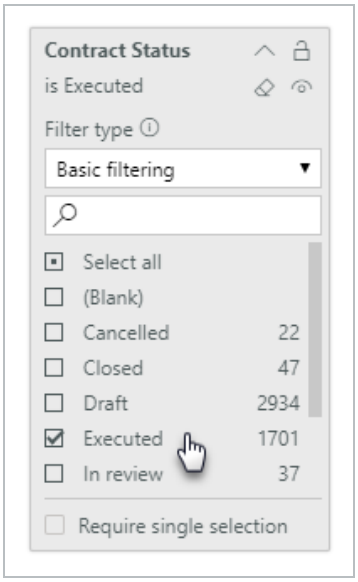
1. Open the **Filters** panel.
2. Click on the # of Contracts by Type **stacked bar chart**.
3. Click on the **Filters** icon and notice you have no filters applied right now.



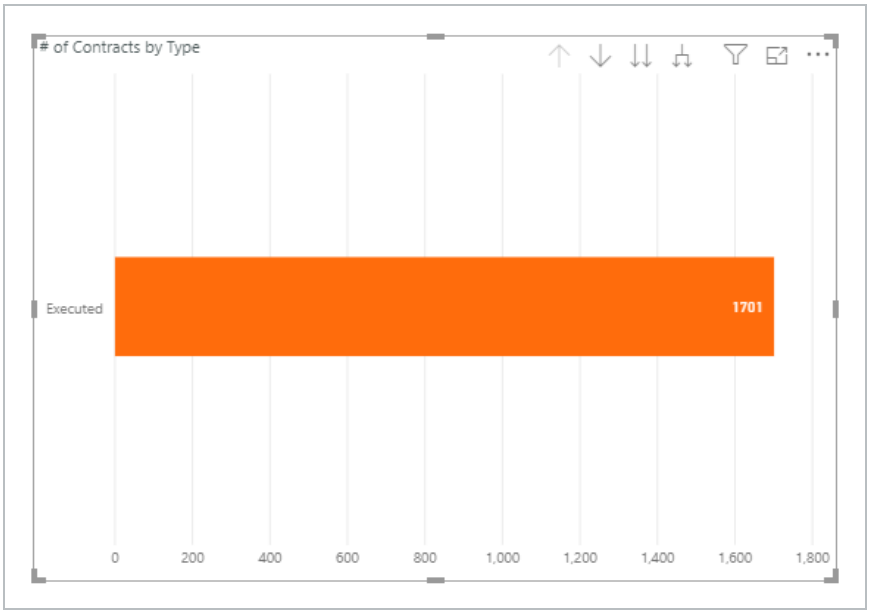
4. Under the Visualizations slide-out panel, click on the **# of Contracts** drop-down to view details of that filter.



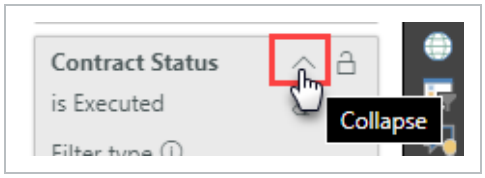
5. On the Visual Filters, click on the **Contract Status** drop-down, select **Executed** to apply the filter.



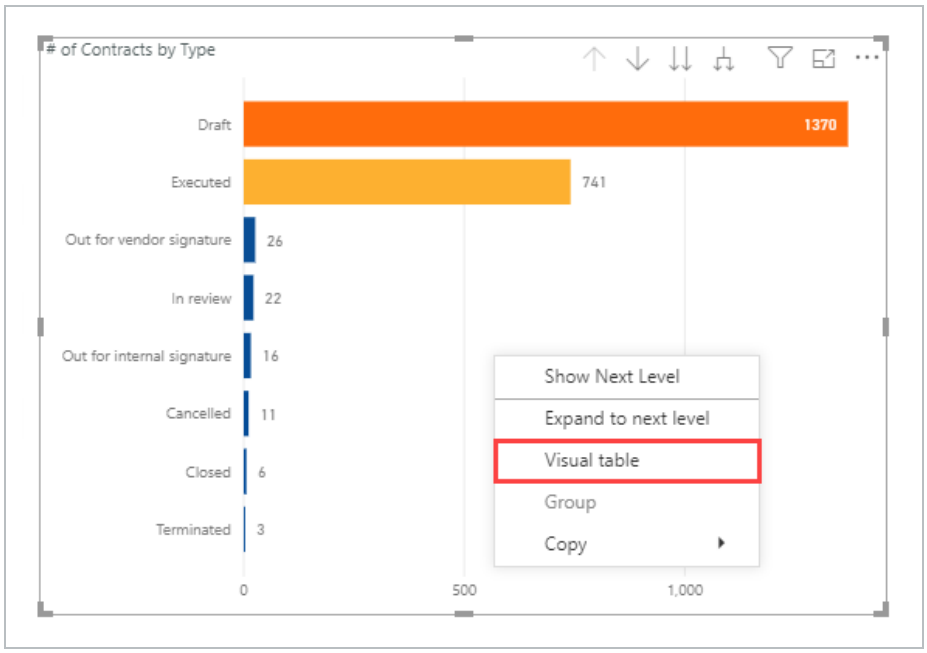
- Notice how this chart changes



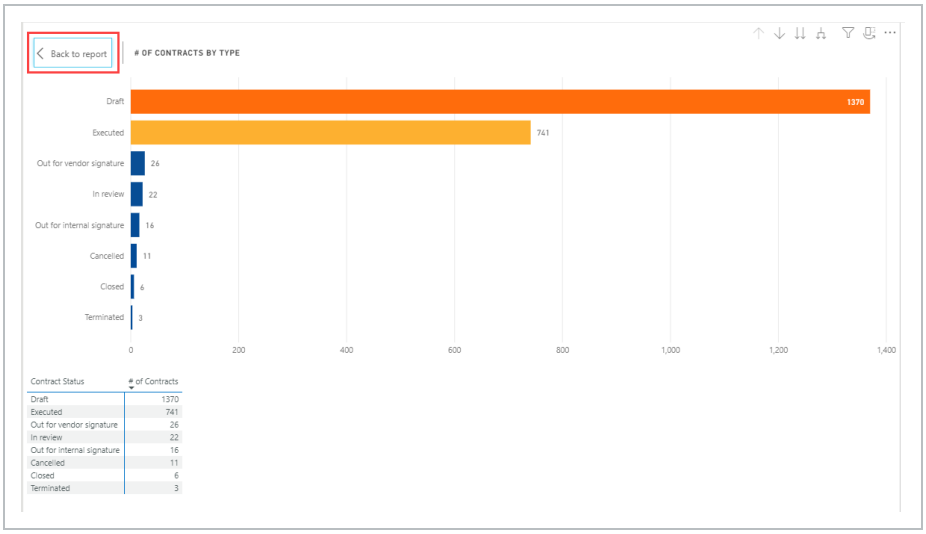
6. Change the Contract Status to **Select All**.
7. Collapse the Contract Status filter.



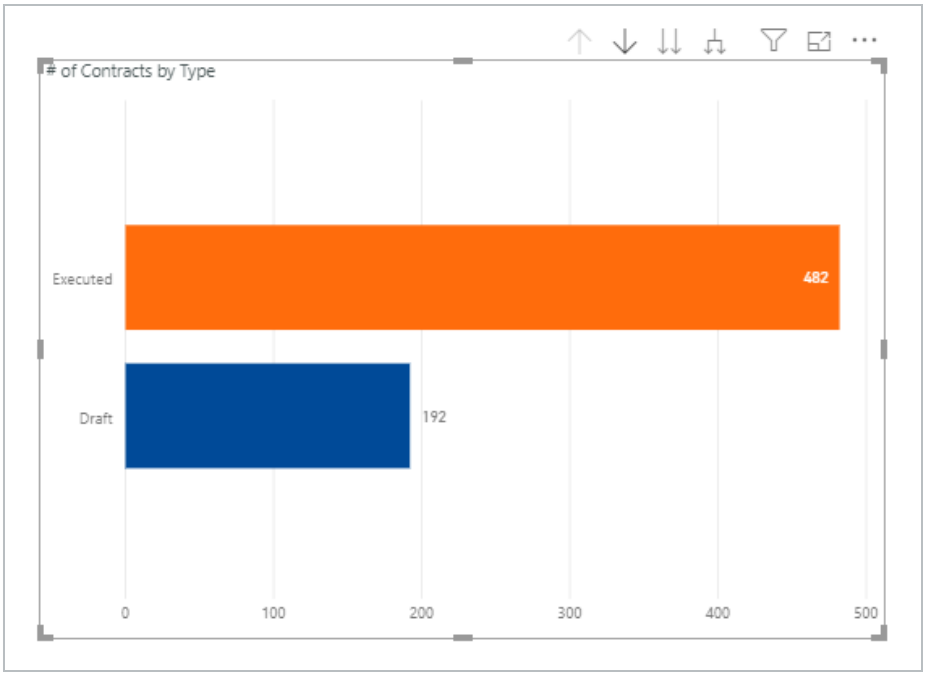
8. Under the filter Contract Type, select 2 options from your drop-down.
9. Within the chart, right-click and select **Visual Table**.



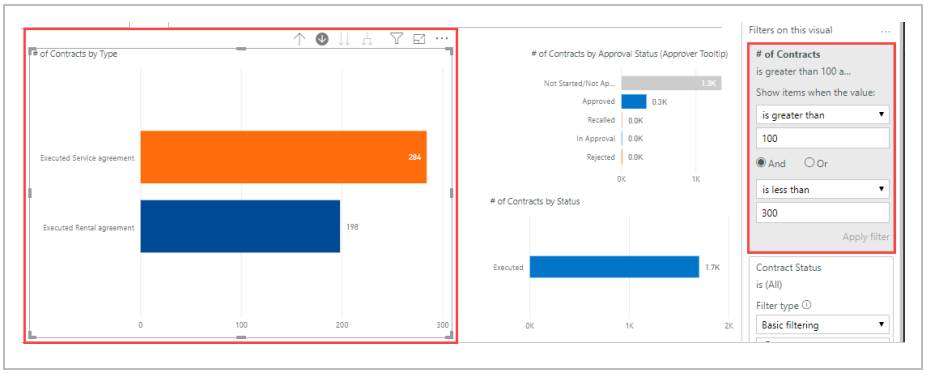
   - The # of Contracts by Type chart now only appears, with the actual data for those two contract types shown.
10. Add a third Contract Type, and see how the chart and data changes again.
11. Click **Back to Report**.



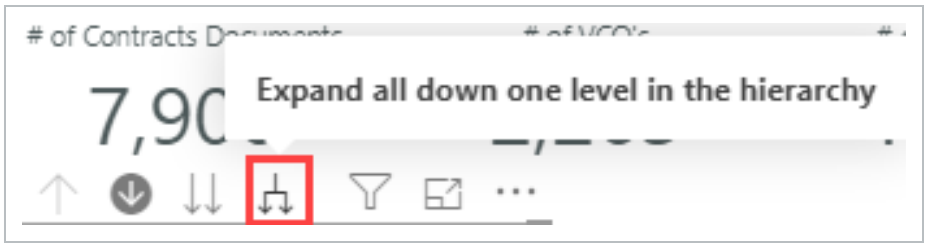
12. Close the **Contract Type** filter.
13. Click **File > Save** to save this dashboard.
14. Open the **# of Contracts** filter.
15. Show items that are **greater then 100 and less than 300**.
16. Click **Apply Filter**.
    - The newly filtered chart appears. In this case, Executed is greater than 300. Why do 482 Executed Contracts appear? Let's drill down further to find out



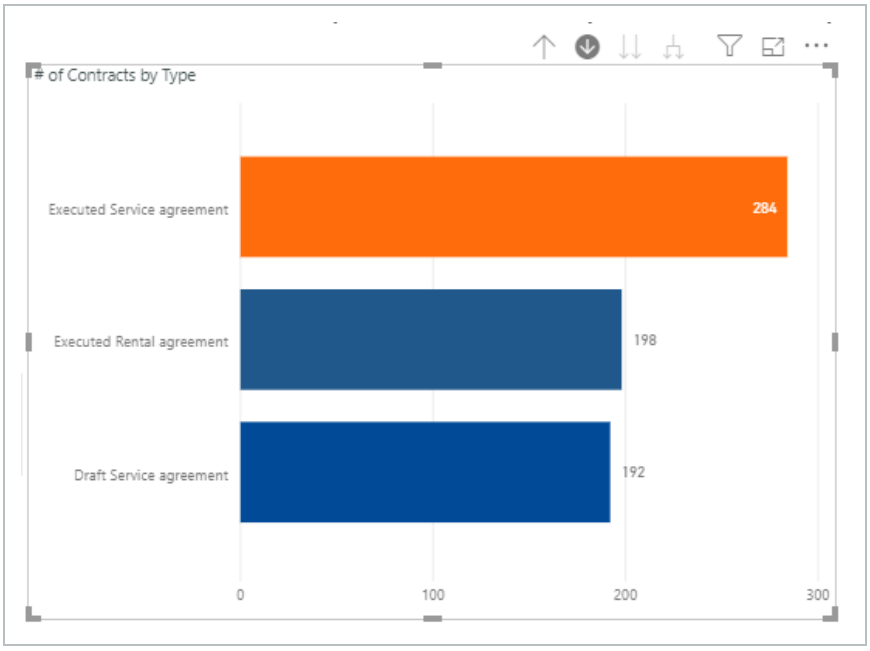
17. Click the **Drill down** icon.
18. Then click on the orange **Executed** row.
    - The chart changes to Executed Service Agreements and Executed Rental Agreements, both under 300



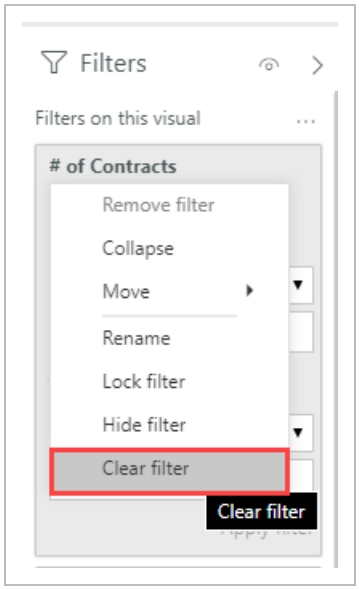
19. Click the **Expand All Down One Level in the Hierarchy** button.



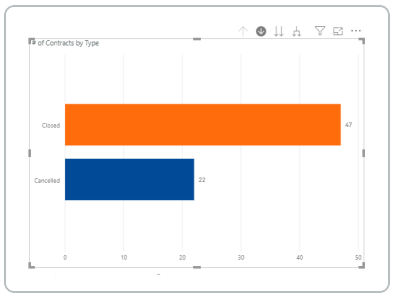
- Now the chart changes to all Executed Contract Types greater than 100 and less than 300



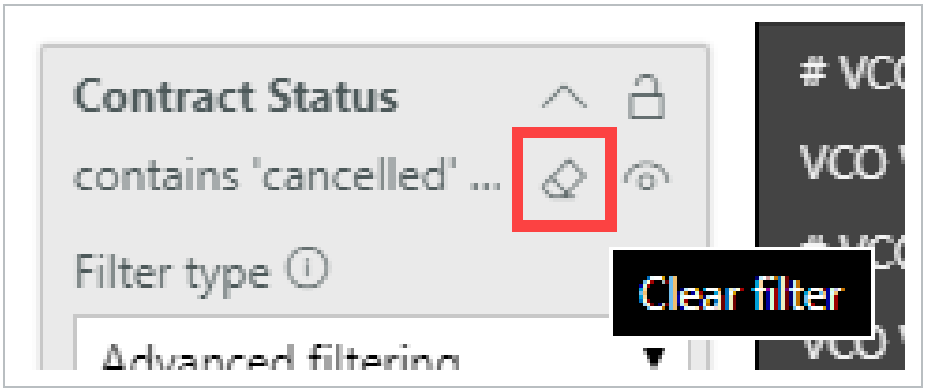
20. Right-click on the image and click **Drill up**.
21. Right-click on the # of Contracts Filter and select **Clear filter**.



22. Under the Contract Status filter, change the drop down from Basic Filtering to **Advanced filtering**.
23. Under Show Items when the value > contains type in **cancelled or contains closed**.
24. Click **Apply filter**.
    - The chart now shows only Cancelled or Closed statuses



25. Click the Contract Status **Clear filter** icon.

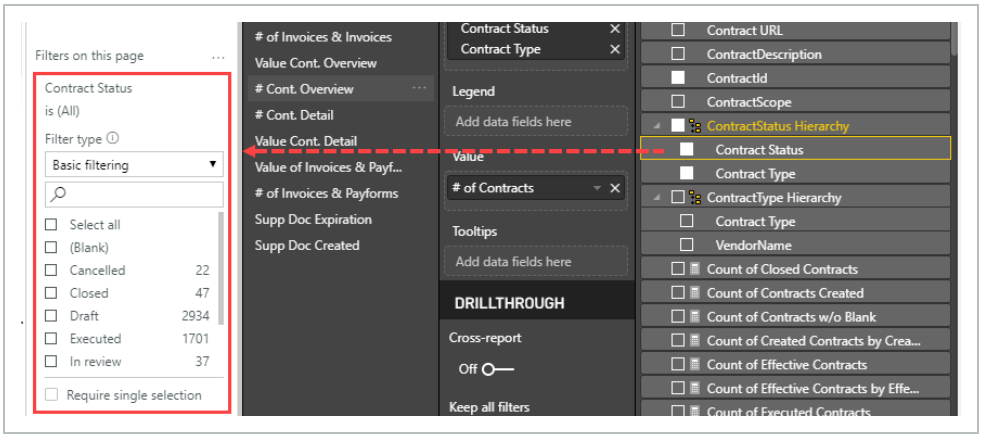


26. Click **File > Save**.

2.2.2 Page filtering

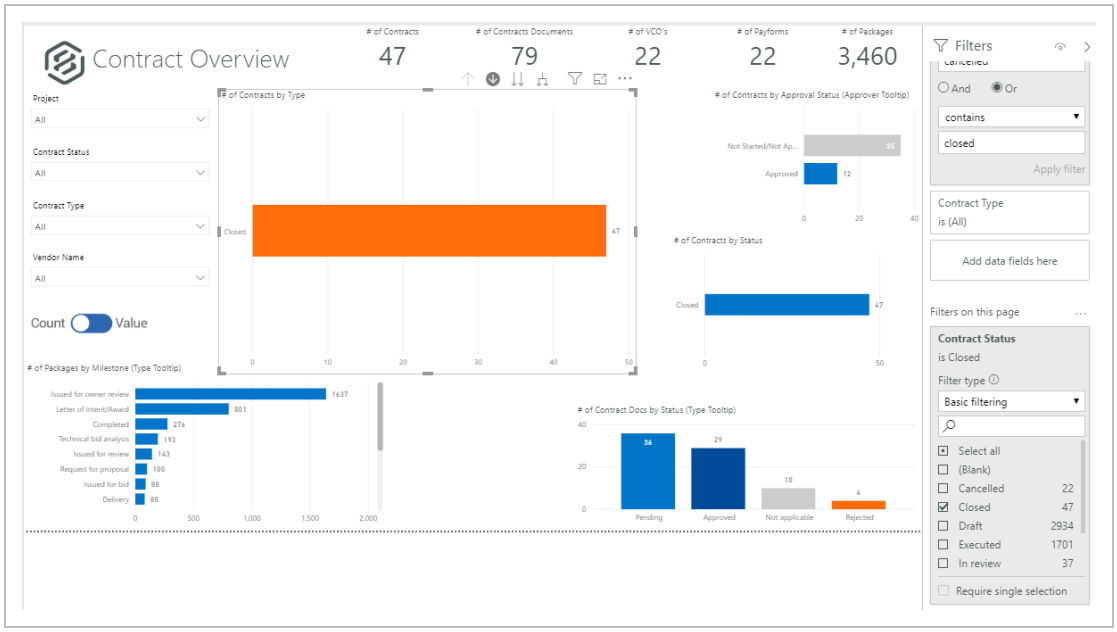
Two options of page filtering exist in Explore. The first is filtering on just this page (tab.)

From the Contract Fields panel, drag the checked **Contract Status** field onto **Filters on this Page**.



Select **Closed** from the Basic Filtering drop-down list.

- Now all reports on this page only show contracts that have been Closed

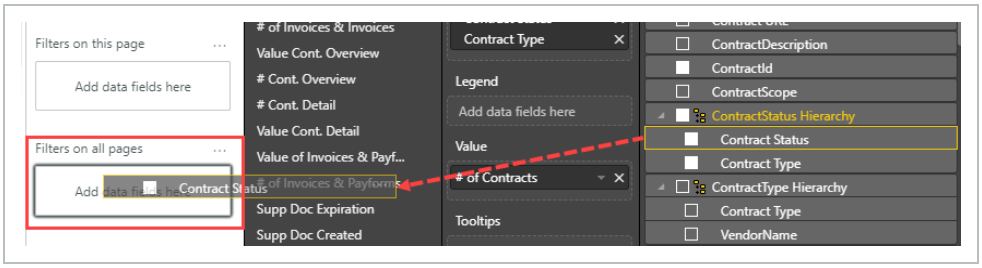


Select the **Remove Filter X** icon.

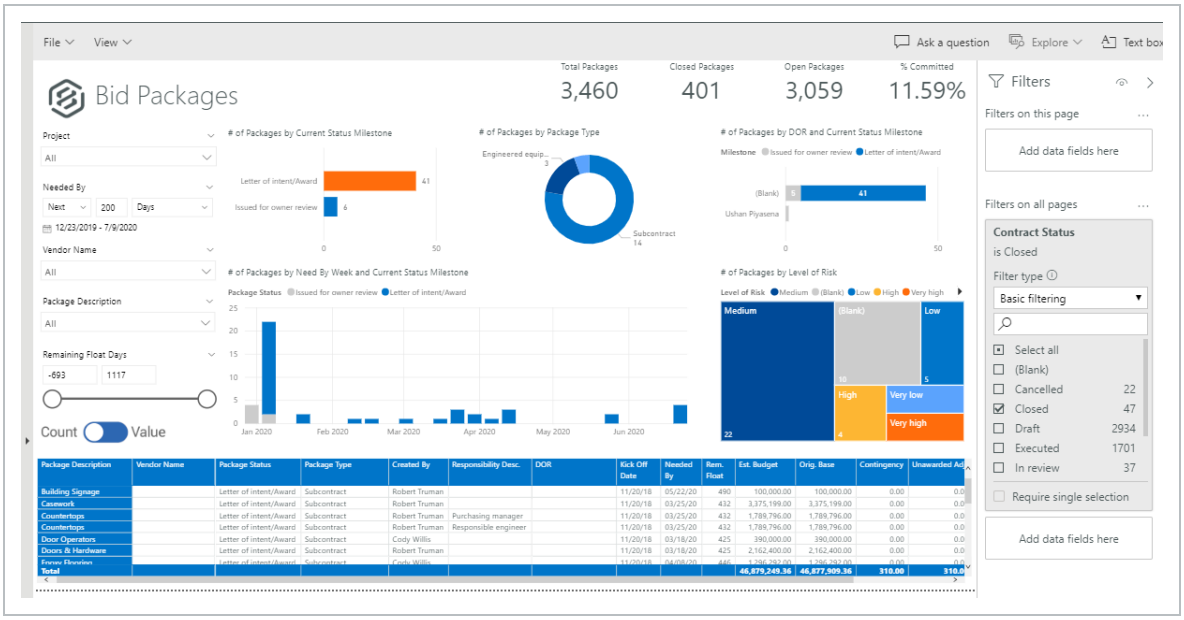
2.2.3 Filter on all pages

The second type of page filter applies a filter across all pages (tabs).

Drag the same **Contract > Contract Status** data field onto Filters On All Pages.



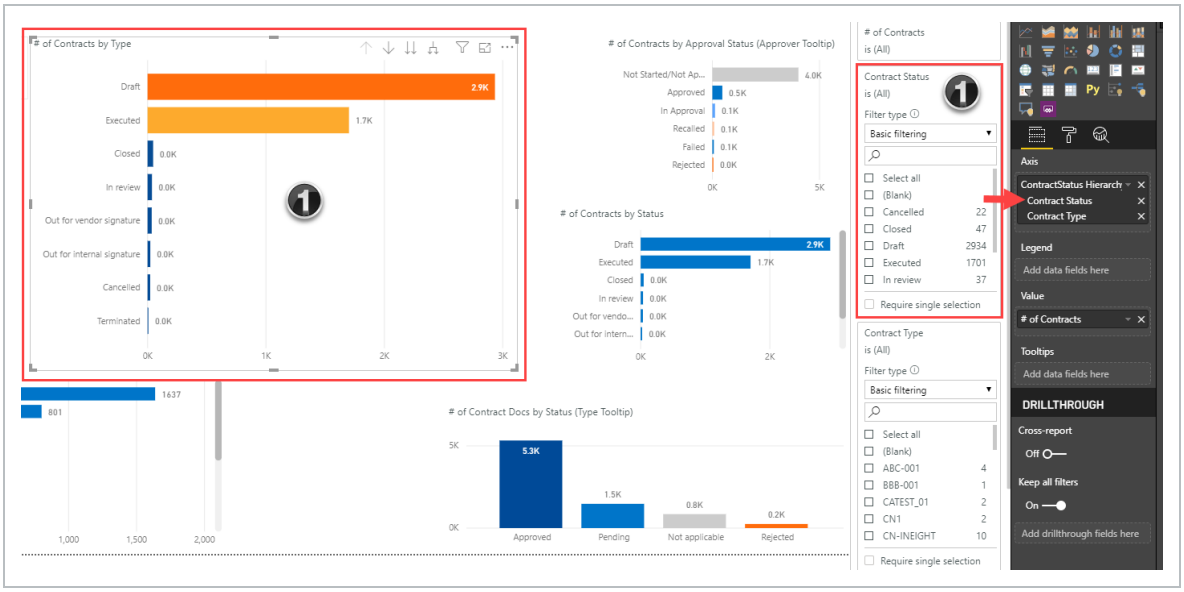
Again choose the option of **Closed** from the drop-down list. Nothing will look different on this tab, only when you select another tab will the change be obvious. For example, this is the Bid Packages tab, where all charts only represent Closed projects.



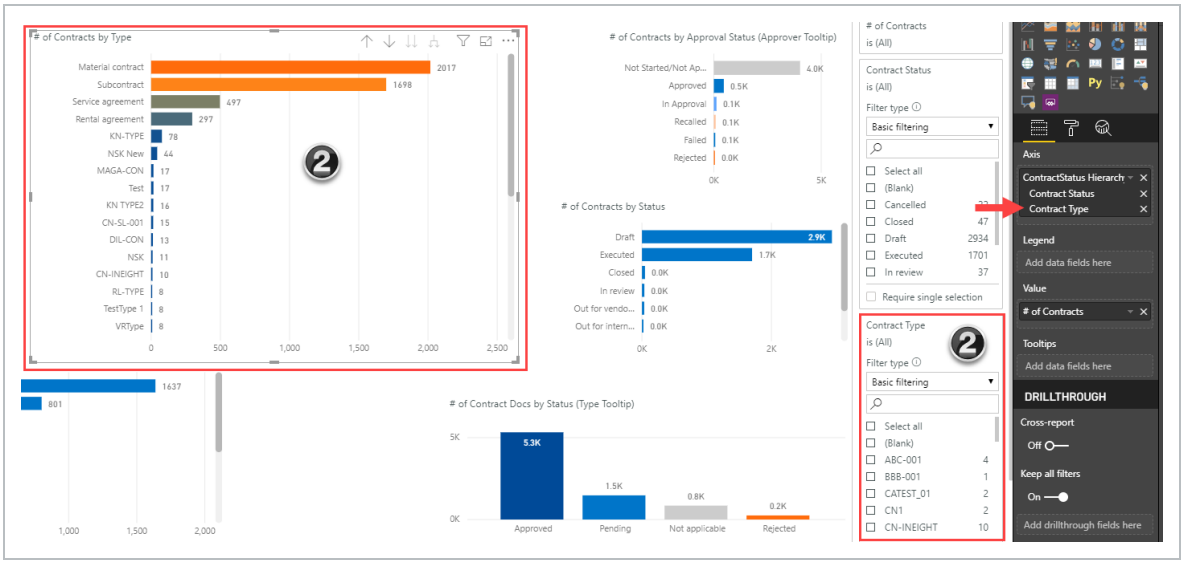
2.2.4 Go to the next level in the hierarchy

The final icon when filtering is the **Go to Next level in the Hierarchy** icon. When in a report and this icon is clicked, the table filters down to the next level in the Hierarchy as shown in this Visualization:

Initially, data will be represented by Contract Status.



When the **Go to Next level in the Hierarchy** icon is selected, the chart will change to # of Contracts by Contract Type.



Throughout the Explore dashboard, there are multiple instances where you can hover over a data-point to obtain a Type Tooltip pop-up showing drill down data.

Last Data Refresh: A time-stamp in the dashboard list indicates when the data in that dashboard was last refreshed. This helps minimize the confusion about why some records may or may not be present in your dashboard.

This page intentionally left blank.

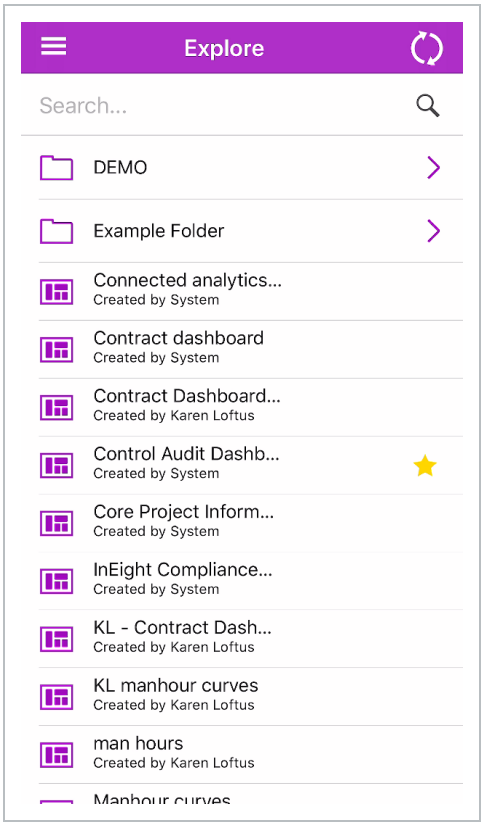
CHAPTER 3 – EXPLORE MOBILE

3.1 MOBILE APPLICATION

The Explore mobile application gives you access to your reports and the ability to view dashboards from a mobile device. This added convenience lets you analyze reporting data from anywhere, which allows you to make informed and timely decisions.

After you log in to the application, the screen opens to show an alphabetical listing of the dashboards.

- All folders and favorites added in the web application also show in Explore mobile.



The following step-by-step shows how to pull up the Explore mobile dashboard.

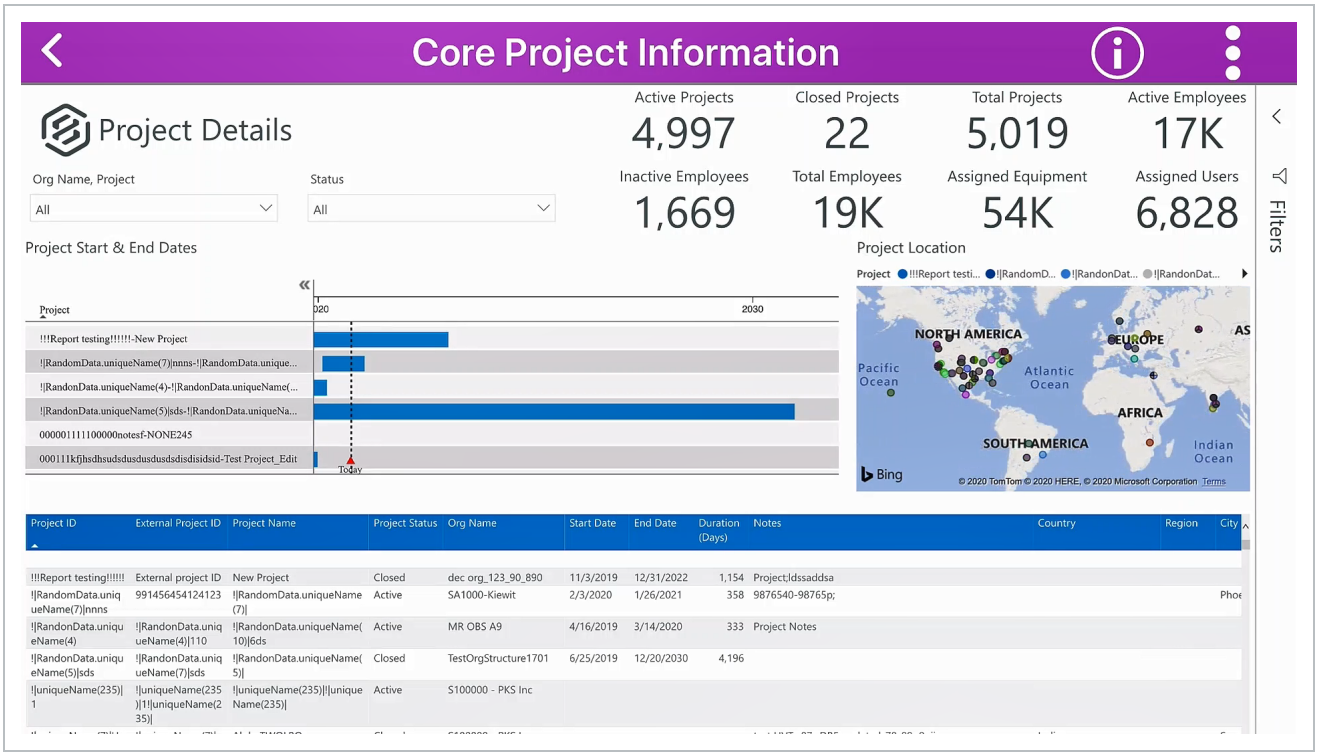
Pull up a dashboard

1. Tap the **Refresh** icon to sync any changes you made in the web application.
2. Scroll through the list of dashboards and folders or use the Search function at the top to find the dashboard you need.

3. Tap a dashboard to open it.
    - The screen will turn from portrait to landscape.

3.1.1 Manipulate a dashboard

In the dashboard, you can refresh the screen, zoom in and out, select different tabs, and modify filters to personalize your view.



You cannot share or edit dashboards in the mobile application.

- Tap the **Information** icon to show additional information about the dashboard, such as the owner of the dashboard and last data refresh time.
- Tap the **ellipses**, and then the **Favorite** icon to make the dashboard a favorite. This also makes the dashboard a favorite in the web application.
- Tap the **Menu** icon. You can toggle between the dashboard and your account information or sign out of the mobile application.

> The Sharing icons are visible but can only be activated in the web application.

3.2 VIDEO INDEX

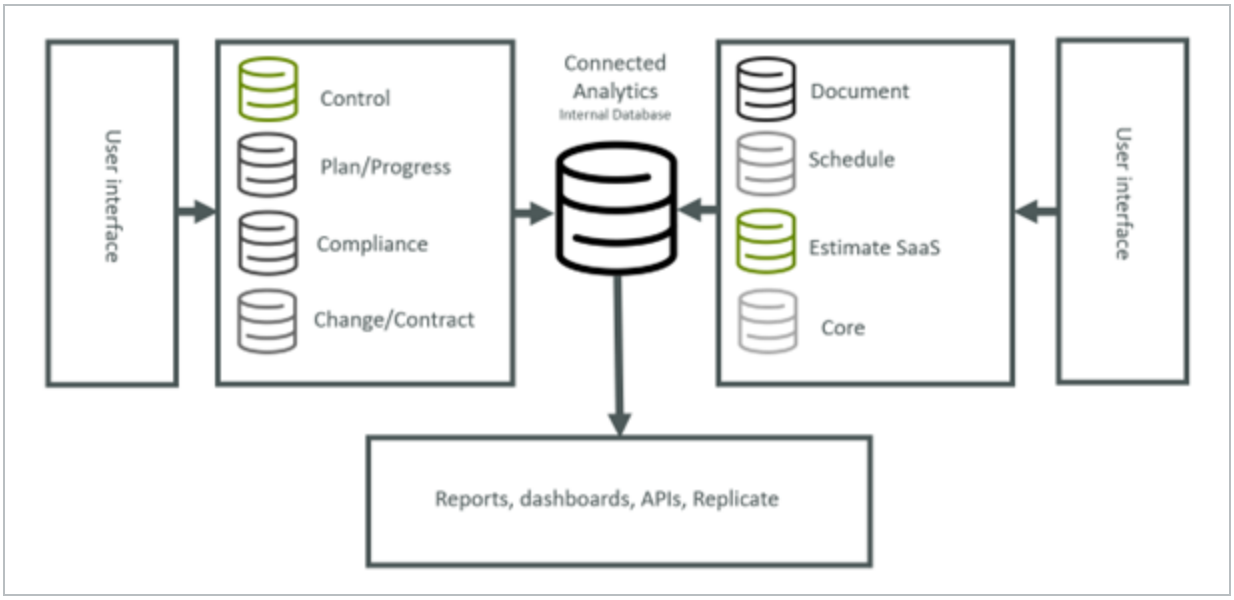
This is an index of video transcript pages. For the full video gallery, see the main video page.

- API Documentation video
- Custom Dashboards video
- Dashboard Favorites video
- Dashboard Filtering video
- Dashboard Folders video
- Dashboard Sharing and Collaboration video
- Embed External Content video
- Estimate Portfolio Dashboard video
- Explore Mobile App video
- Settings Page video
- Standard Dashboards video

3.3 EXPLORE FREQUENTLY ASKED QUESTIONS

What is the Reporting data flow?

The following workflow shows the relationship between InEight applications, the Connected Analytics database, and the Report and Explore applications (including reports, dashboards, and APIs).



When looking to integrate InEight data with our systems, can we use the Reporting APIs if the Integration APIs don't have the data we're looking for?

No, using the Reporting APIs in place of the Integration APIs is not supported, nor is it recommended.

Integration APIs source data directly from their respective product's database, allowing data to appear in the Integration APIs in real-time without a data lag.

Alternatively, the Reporting APIs read data from a consolidated database that aggregates data from the different products' databases rather than drawing directly from the source database. This increases the likelihood that there could be a point of failure between the product source database and reporting, causing the reporting data to be out of sync.

Also, in the acquisition of this data, there may be a refresh interval that occurs in the background to pull data from the product source database to the reporting database. This opens you up to the possibility that the data may not match what the product user interface reads. This potential data latency can also make scheduling data pulls complicated, especially when you are looking to support critical processes, such as payroll runs.

What is the difference between Explore and SelfService APIs?

SelfService APIs are designed to satisfy extraction requirements. These APIs more closely match the source data, though we do some denormalization to combine IDs and text into the same table and ensure field/table naming more closely matches the user interface. Records that have been deleted or updated in the products' user interface are soft-deleted in the database. These APIs

will expose both “active” and “inactive” (soft-deleted) records. An example of this use case would be writing ETL against the data to extract it into a data warehouse that is used to combine data for reporting. However, it is important to note that these APIs can also be used for BI use cases, such as connecting to Power BI.

The APIs prefixed with Explore are designed to satisfy more of a BI use case. These APIs report only active and latest records as reflected in the system. And in some cases, they may have more business logic implemented in the code behind them. They also will have naming conventions similar to what is in the user interface of the InEight applications. An example of this use case would be connecting in Power BI.

For the most part, Explore APIs will have a SelfService counterpart, and the documentation for the SelfService API should apply to the Explore APIs, with some minor differences.

Can ETL be written against the APIs to bring data into a reporting environment?

Yes, this is possible. If you need your Client ID and Secret for your selected ETL tool, you can reach out to InEight Support or your InEight representative.

Please note that troubleshooting errors and setting up connections for your ETL tools outside of InEight is not included in our services.

What are the refresh times on the APIs?

Currently, the refresh time of reporting data varies by product. Most products' data refresh utilizes an incremental load methodology. This means, on an interval basis, our database looks for changes in the product databases based on the modified date on the records. Based on the detected changes, the reporting database updates accordingly.

Some InEight Applications have implemented the architecture for entity change on some or all of their database entities.

An example to entity change is the setting “When the user updates Current Estimate Total Cost of a Cost Item, this change will be reflected within the next five minutes in the corresponding SelfService_Control_CurrentEstimate reporting api”, whereas there are APIs that only refresh once a day. The InEight Plan APIs (listed below) fall into the once a day category.

That means for those entities we can leverage a trigger-based refresh. This means the fresh data will be reflected in the reports and APIs in near-real-time (five minutes or less).

The rule of thumb, however, is twenty minutes or less for all reports and APIs, unless otherwise noted in the API or report documentation.

There are 5 APIs that are on a daily refresh cadence (this applies to these APIs only and does not have any bearing on reports in Report):

- SelfService_Plan_Timecard
- SelfService_Plan_WeeklyTimesheetVersion
- SelfService_Plan_DailyPlanHoursResourceVersion
- SelfService_Plan_DailyPlanHoursResourceDetailVersion
- SelfService_Plan_DailyPlanHoursPayrollIndicatorVersion

The refresh cadence of APIs is published in our API documents.

What is pagination and what is the pagination for the reporting APIs?

Pagination is a method of segmenting the data returned by an API in an attempt to not overwhelm it with larger datasets.

All of the reporting APIs have a pagination setting, and most are set to 50,000. However, some of the larger APIs are set to 5,000. This is also noted in the API documentation.

Are there limits on how many API calls can be made?

We currently impose a rate limit of 50 calls per minute on each API.

Are there permissions needed to access the Reporting APIs?

Yes, permissions are required to access the Reporting APIs. They can be found in **Suite administration > Roles and permissions > Explore > Reporting APIs**. These permissions are split out by product.

How do I connect to Reporting APIs?

You can access Reporting APIs from the following link: Reporting APIs

What is the data refresh interval on the Explore dashboards?

The Explore dashboards that come with the system will refresh 1-3 times per day. These refreshes can be scheduled in **Organization Settings > Explore**. You can also initiate on-demand refreshes on this page but there is a maximum of five refreshes per day per dashboard. You need to be an Organization Admin with the organization and have the **Project > Access Explore settings** permission. The Explore Organization settings page also has an option to kick off an on-demand refresh for each dataset.

Each custom-built dashboard refreshes when the system dashboard it was built from refreshes.

What kind of security is applied to the dashboards?

We apply the same project-level security to the dashboards that we do on reports. This means when users access a dashboard, they can only see data for projects they have assignments on.

The dashboard visibility itself is controlled at the Organization level, meaning that when a dashboard has its visibility turned on or off on the Explore Settings page, this applies for the whole organization.

There is an additional InEight Platform permission for Explore that will control a user's available dashboards, so they only see dashboards that have been shared with them as an individual.

This can be found in the Explore section under Roles and Permissions

Why are some dashboards deployed early or hidden?

Our dashboard release strategy is to deploy dashboards to clients a release before they technically "go-live", referring to these early releases as "Preview" releases. These Preview releases give you a "sneak peek" and an opportunity to test the new functionality and provide feedback before the dashboards officially go live.

Users can make these dashboards visible by navigating to the Explore Settings page and toggling the visibility from **Off** to **On**. This will apply for the whole organization. Note that you will need an additional Platform permission to access the Explore Settings page.

- If you turn on the visibility for a dashboard before it has gone live (as a Preview dashboard), when the dashboard goes live, it will stay visible.
- If you turn the dashboard visibility on and then back off, it will stay hidden when the dashboard goes live.
- If you leave the dashboard visibility set to "Hide" and don't touch it while it's in Preview, then the dashboard will become visible upon going live.

What Permissions are required for the API Generator?

You will need the following permissions from **Platform > Suite administration > Roles and permissions**:

- Explore > API Generator
- For pulling data from the Completions or Compliance application

- Explore > Reporting APIs > View Completions web APIs
- Explore > Reporting APIs > View Compliance APIs

You will also need module-level permissions assigned in Compliance or Web Completions.

What is the refresh rate for API Generator data?

Due to the complexity of manipulations to get the data in the correct format, data in the APIs is updated daily. The data is therefore staged to avoid running into performance and timeout issues when you access your APIs.

Can I create an API with multiple forms?

No, this feature is specific only to singular forms.

How do I troubleshoot different errors received when connecting to the APIs?

401: Unauthorized - generated token isn't valid or available

- Try regenerating the authentication token.

404: Resource not found

- APIM has been updated to the latest version and your environment is on a previous version. This will be resolved when your environment is upgraded.
- The API in question has been removed from our codebase, but not APIM. This does not occur often and it will be documented in the Release Notes if it happens.

500: Internal Server Error

- Authentication token isn't valid.
- There could have been a column modification, which will also be documented in the Release Notes.
- Transient/Intermittent Azure related issue.

502: Bad Gateway

- This is a timeout issue. The system has two minutes to run the API query and return data.
- Could be a data volume issue. Try limiting the API call with some kind of filtering.
- Reduce simultaneous calls.