Custom Dashboards
Which tiles are included in this guide?

| Ref	Product	Title	Chart Type	Complexity
1	Analyze	Agreements uploaded by month	Bar/Column	LOW
2	Analyze	Agreements by Agreement Type	Pie	LOW
3	Analyze	Agreements renewing by month with Automatic Renewal	Bar/Column	MEDIUM
4	Analyze	MSAs renewing this year by month with Automatic Renewal & Termination for Convenience	Bar/Column	MEDIUM-HIGH
5	Analyze	Agreements renewing this year by month and Agreement Type with Automatic Renewal	Stacked Bar/Column	HIGH

Custom Dashboards

1: Agreements uploaded by month
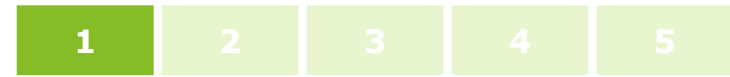
Ref	Product	Title	Chart Type	Complexity
1	Analyze	Agreements uploaded by month	Bar/Column	LOW

▾ Filters ☐ Custom Filter

No filters selected.

▾ Visualization Edit ⚙▾
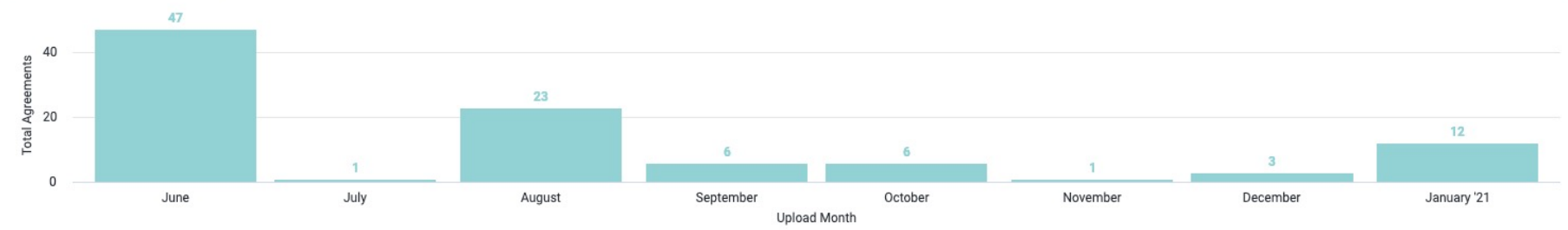
Edit ⚙▾
Plot | Series | Values | X | Y
Value Labels

▾ Data | Results | SQL | Calculations | Row Limit 500 | ☐ Totals

	Agreements Upload Month	Agreements Total Agreements
1	2021-01	12
2	2020-12	3
3	2020-11	1
4	2020-10	6
5	2020-09	6
6	2020-08	23
7	2020-07	1
8	2020-06	47

Upload Month

Total Agreements

2

Custom Dashboards

2: Agreements by Agreement Type

Ref	Product	Title	Chart Type	Complexity
2	Analyze	Agreements by Agreement Type	Pie	LOW

▼ Filters   ☐ Custom Filter

No filters selected.

▼ Visualization   Edit ⚙▼

- Non Disclosure Agreement 38.90%
- Master Agreement 32.40%
- Service Agreement 15.20%
- Sales Agreement 12.00%
- Amendment 1.50%

▼ Data | Results | SQL   Calculations Row Limit 500 ☐ Totals

	Agreement Types Agreement Type	Agreements Total Agreements ⌄
1	Non Disclosure Agreement	389
2	Master Agreement	324
3	Service Agreement	152
4	Sales Agreement	120
5	Amendment	15

Agreement Type

Total Agreements

Custom Dashboards

3: Agreements renewing by month with Automatic Renewal

Ref	Product	Title	Chart Type	Complexity
3	Analyze	Agreements renewing by month with Automatic Renewal	Bar/Column	MEDIUM

▼ Filters (4)   ☐ Custom Filter

⚙ Events **Event Type**   is equal to ⇅   Renewal Date ×   × +

⚙ Event Dates **Event Date**   is on or after ⇅   (absolute) ⇅   2021-01-27 📅   × +

⚙ Smart Values **Smart Value**   is equal to ⇅   Automatic Renewal ×   × +

⚙ Terms **Term Value (T/F/NP)**   is equal to ⇅   True ×   × +

Event Type
Event Date
Smart Value
Terms Value (T/F/NP)

▼ Visualization   Edit ⚙▾

Edit ⚙▾
Plot | Series | Values | X | Y
Value Labels
Plot | Series | Values | X | Y
Show Axis Name
Custom Axis Name
Renewal Month

▼ Data   Results   SQL   Calculations   Row Limit 500   ☐ Totals

	Event Dates Event Month ⊟ ⌄	Agreements Total Agreements
1	2021-12	1
2	2021-11	∅
3	2021-10	∅
4	2021-09	1

Event Month
Total Agreements

4

Custom Dashboards

4: MSAs renewing this year by month with Automatic Renewal & Termination for Convenience
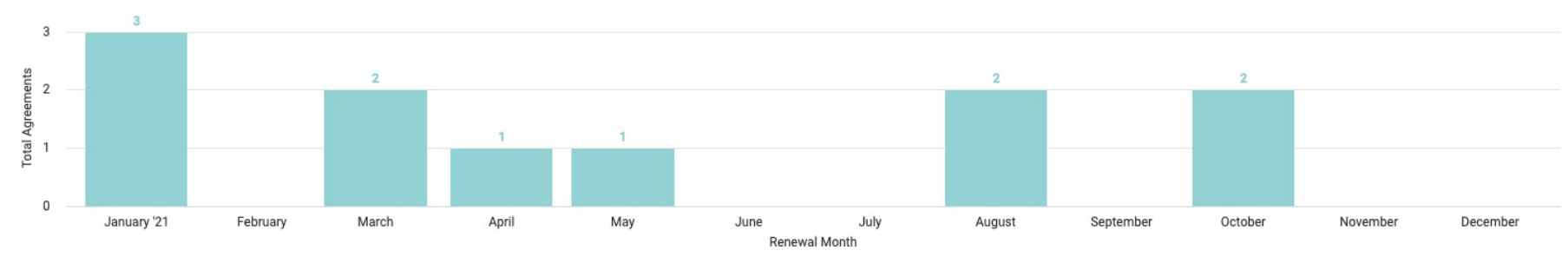
Ref	Product	Title	Chart Type	Complexity
4	Analyze	MSAs renewing this year by month with Automatic Renewal & Termination for Convenience	Bar/Column	MEDIUM-HIGH

Filters (5)
☐ Custom Filter

⚙ Agreement Types **Agreement Type** | is equal to ⇕ | Master Agreement ✕ | ✕ +

⚙ Events **Event Type** | is equal to ⇕ | Renewal Date ✕ | ✕ +

⚙ Event Dates **Event Date** | is in the year ⇕ | 2021 | ✕ +

⚙ Smart Values **Smart Value** | is equal to ⇕ | Automatic Renewal ✕
Termination For Convenience ✕ | ✕ +

⚙ Terms **Term Value (T/F/NP)** | is equal to ⇕ | True ✕ | ✕ +

- Agreement Type ☰
- Event Type ☰
- Event Date ☰
- Smart Value ☰
- Term Value (T/F/NP) ☰

Visualization

Bar chart — Total Agreements by Renewal Month:
- January '21: 3
- February: 0
- March: 2
- April: 1
- May: 1
- June: 0
- July: 0
- August: 2
- September: 0
- October: 2
- November: 0
- December: 0

Edit ⚙
Plot | Series | **Values** | X | Y
⦿ Value Labels

Plot | Series | Values | **X** | Y
⦿ Show Axis Name
Custom Axis Name
Renewal Month

Data | Results | SQL
Calculations | Row Limit 500 | ☐ Totals

Event Dates Event Month ☰ ⌄	Agreements Total Agreements
1 2021-12	∅
2 2021-11	∅
3 2021-10	2
4 2021-09	∅

- Event Month
- Total Agreements

5

Custom Dashboards

## 5: Agreements renewing this year by month and Agreement Type with Automatic Renewal

Ref	Product	Title	Chart Type	Complexity
5	Analyze	Agreements renewing this year by month and Agreement Type with Automatic Renewal	Stacked Bar/Column	HIGH

▼ Filters (4)   ☐ Custom Filter

⚙ Events **Event Type**	is equal to ⬍	Renewal Date ×	✕ +
⚙ Event Dates **Event Date**	is in the year ⬍	2021	✕ +
⚙ Smart Values **Smart Value**	is equal to ⬍	Automatic Renewal ×	✕ +
⚙ Terms **Term Value (T/F/NP)**	is equal to ⬍	True ×	✕ +

Event Type ≡
Event Date ≡
Smart Value ≡
Term Value (T/F/NP) ≡

▼ Visualization   Edit ⚙▾

Renewal Month

● Amendment ● Master Agreement ● Sales Agreement ● Service Agreement
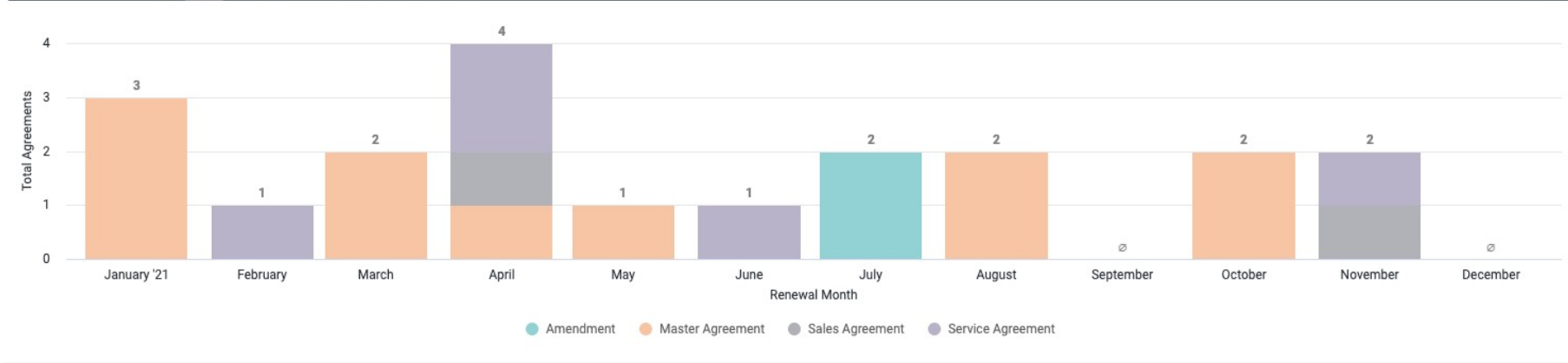
Edit ⚙▾

| Plot | Series | Values | X | Y |

Series Positioning
○ Grouped
◉ Stacked
○ Stacked Percentage

| Plot | Series | Values | X | Y |

◯ Value Labels
◯ Label Null Columns
◉ Totals Labels ❓

▼ Data   Results   SQL   Calculations   Row Limit 500   Column Limit ☐ Totals ☐ Row Totals

Agreement Types Agreement Type ›	Amendment	Master Agreement	Sales Agreement	Service Agreement
Event Dates Event Month ≡ ∨	Agreements Total Agreements	Agreements Total Agreements	Agreements Total Agreements	Agreements Total Agreements
1 2021-12	∅	∅	∅	∅
2 2021-11	∅	∅	1	1
3 2021-10	∅	2	∅	∅
4 2021-09	∅	∅	∅	∅
5 2021-08	∅	2	∅	∅

Event Month
Total Agreements
Agreement Type ↵