Alcumus
Safer, Healthier, Stronger

SAFETY INTELLIGENCE

FUNCTIONALITY USER GUIDE

Table of Contents

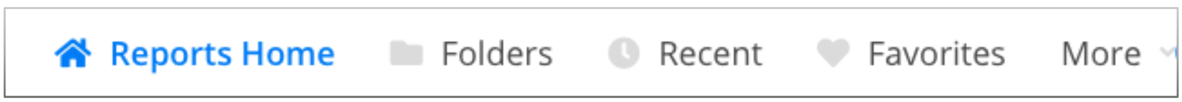
Section 1: Safety Intelligence Home Page

What's new?
Reporting has been made effortless with our new dashboards. These dashboards have a modern look and feel, they are completely customizable, have user-friendly filters and provides easy workflows of creating and editing.

The **Home Page** consists of various tabs

Reports Home

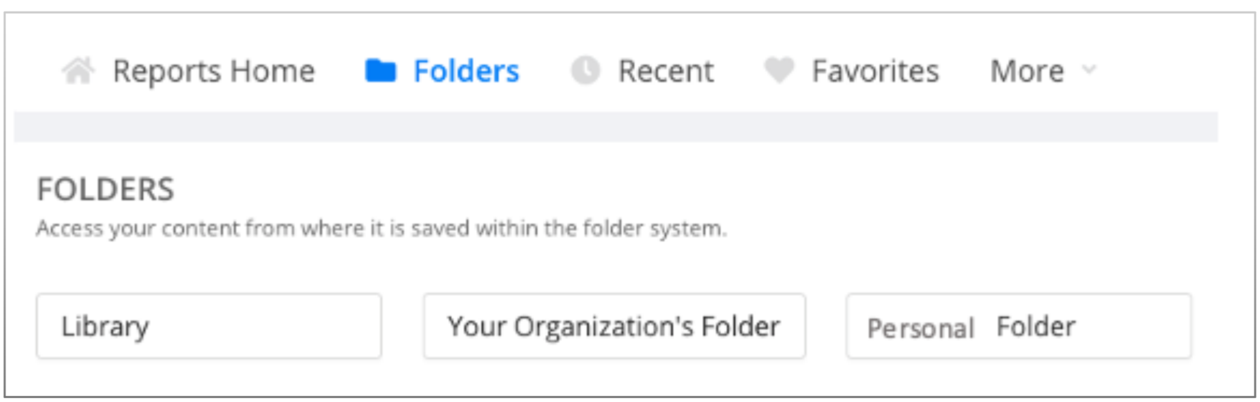
Contains a list of all the Dashboards and Looks including standard out of the box dashboards. The standard dashboards are present the Library folder.



Folders

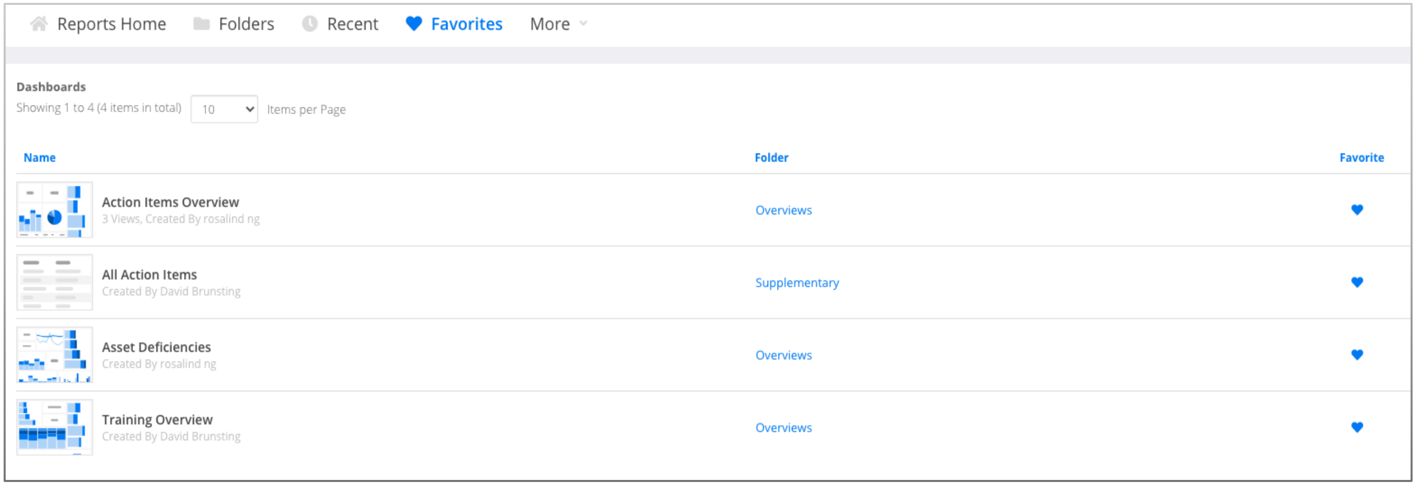
Folders are containers that hold Dashboards and Looks. It helps to keep your data organised. All the dashboards can be accessed from the folders they are saved in.

- **Library** folder – Consists of Overviews and Supplementary folders in which the standard dashboards are present.
- **Your Organisation** folder – Any Dashboard and Looks saved in this folder would be accessible to all the authorized users across your organisation.
- **Personal** Folder – contains user-created dashboards and Looks, typically ones that you are developing or that are mainly of interest to you.



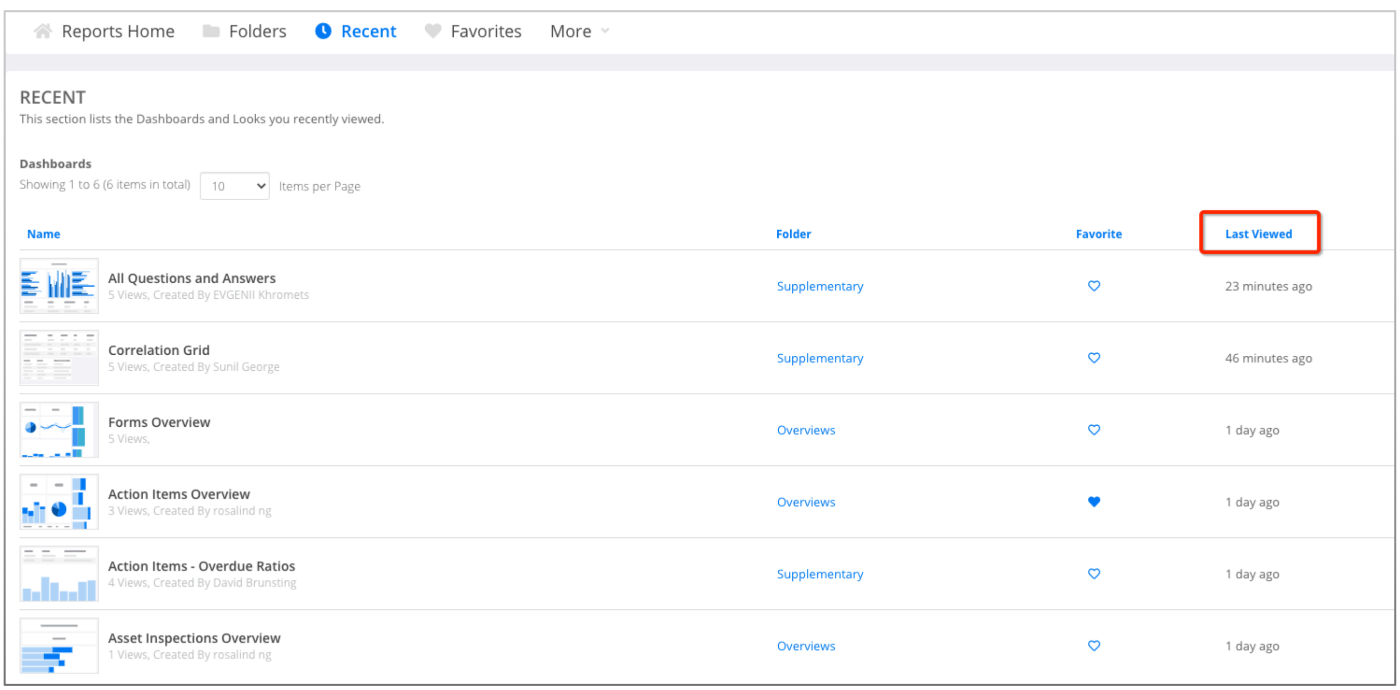
Favorites

Favorites shows a list of Looks or dashboards that you've marked as favorites by clicking the heart icon on the right side of the content's listing in a folder.



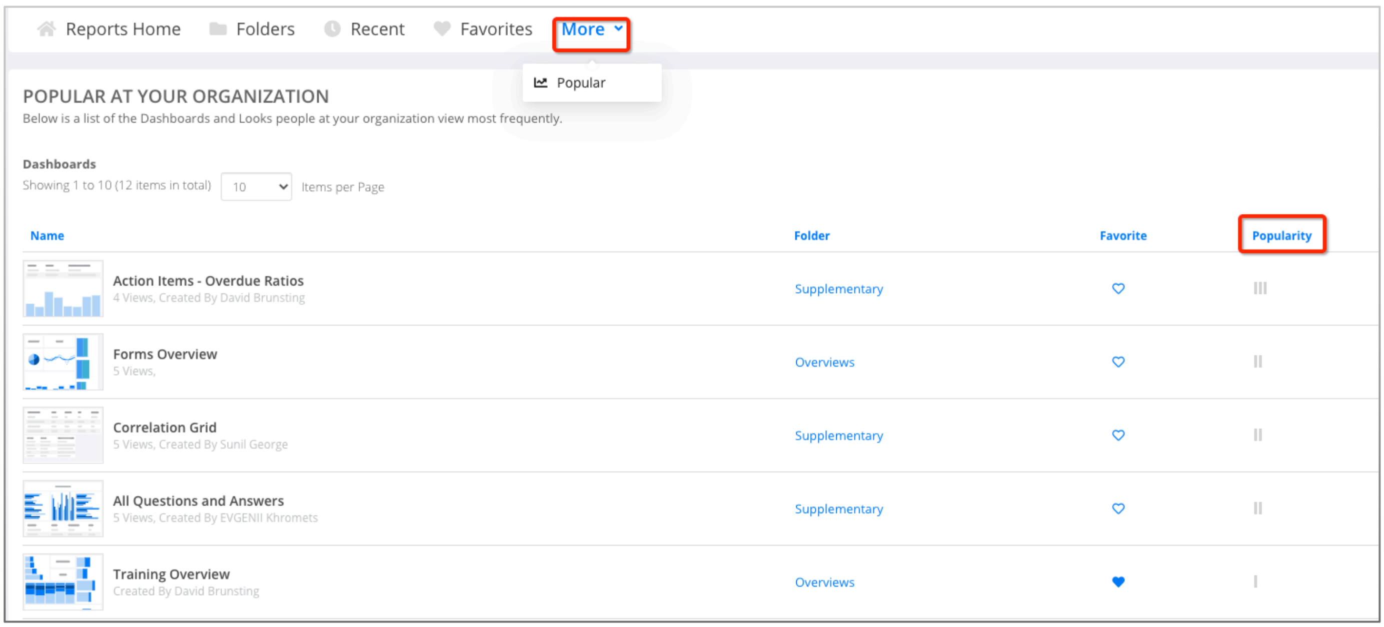
Recent

Recently Viewed shows a list of your most recently viewed content, which can help you quickly revisit items of interest. The list is by default sorted by Last Viewed in ascending order.



Popular

Popular shows a list of the most visited content, which can help you get acquainted with the most useful items.
Click on **More** in the toolbar to see list of popular items. Popularity score is calculated based on the number of times the Dashboards and Looks are viewed.

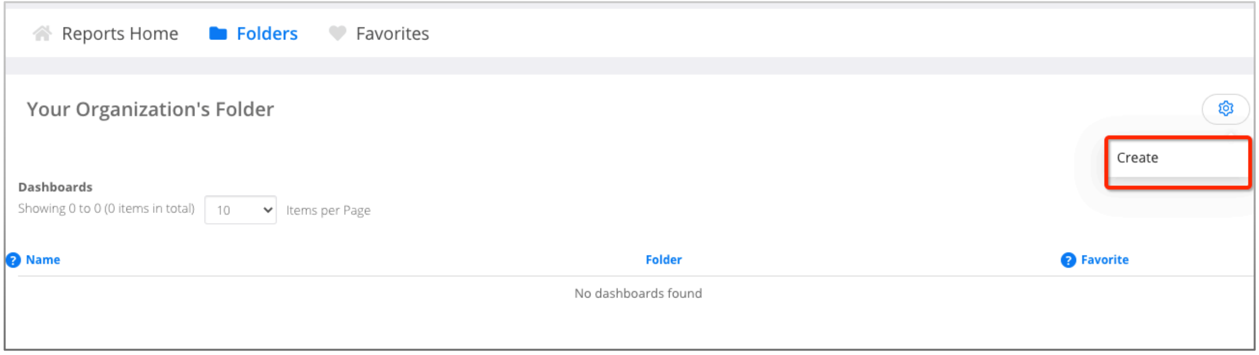


Section 2: Creating new folders

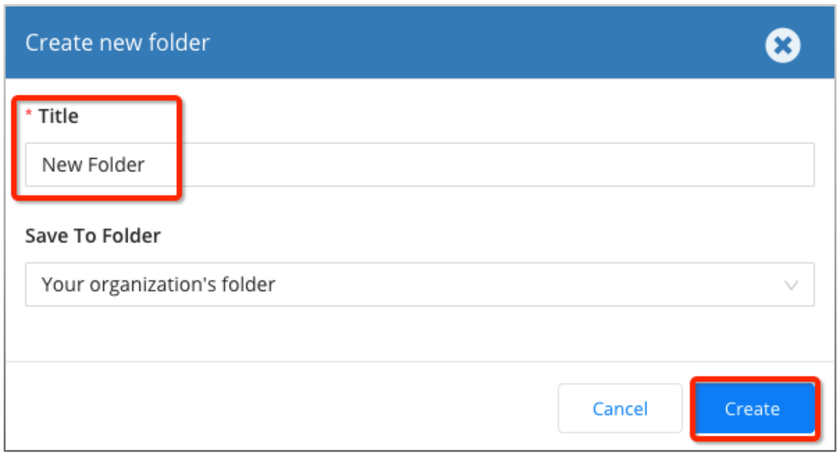
To keep your data organised, you can create new sub folders under Your Organisation's Folder and Personal Folder.

Steps:

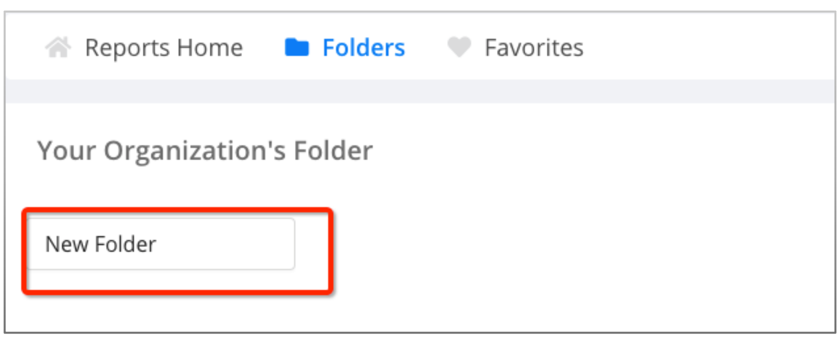
1. Navigate Folders tab
2. Select Your Organisation Folder or Personal Folder
3. Click on **Create** on right side of the page



4. Give a Title and select the folder under which you wish to create the sub-folder



The new sub-folder will now appear under Your Organisation's Folder. You would be able to save dashboards in these newly created folders.



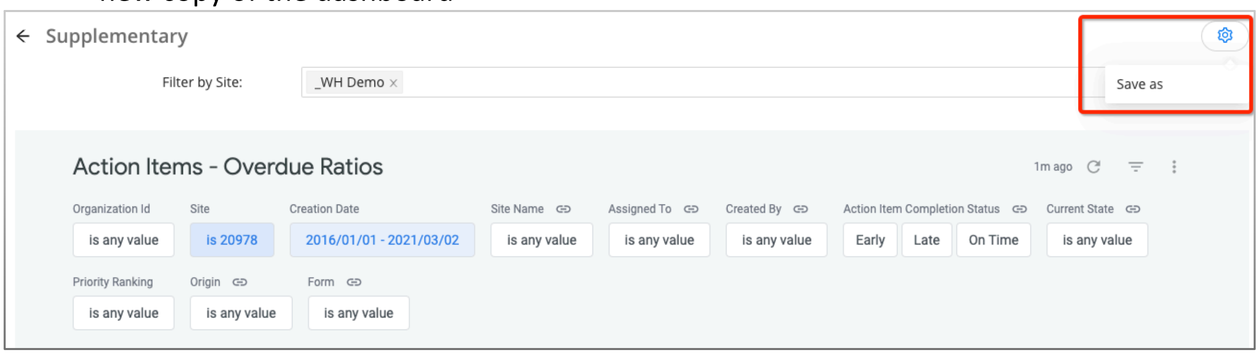
Section 3: Editing a dashboard

Saving a new copy of the dashboard

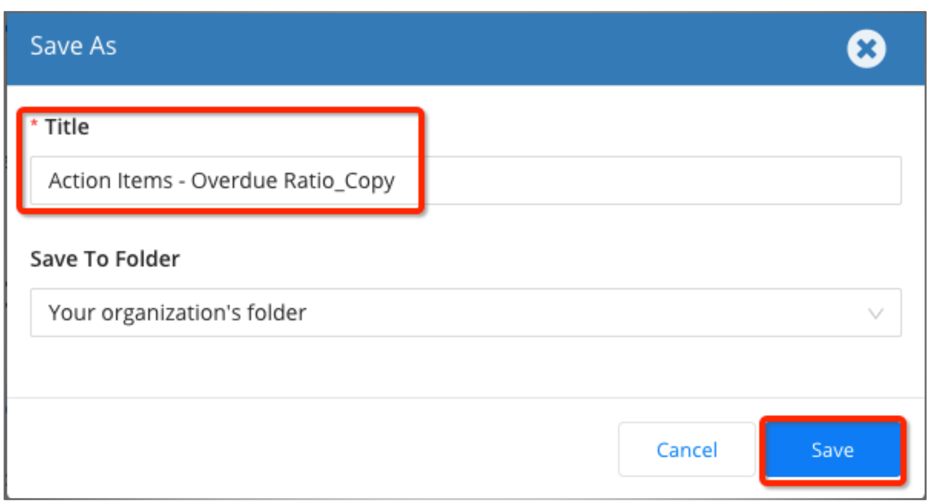
The standard dashboards (in Overviews and Supplementary folders) cannot be edited. However, changes to the filter can be made and the dashboard can be saved as a separate copy under any of the other folders or sub-folders.

Steps:

1. Change the values in any of the filter(s) and click on icon on right side of page to **Save** new copy of the dashboard



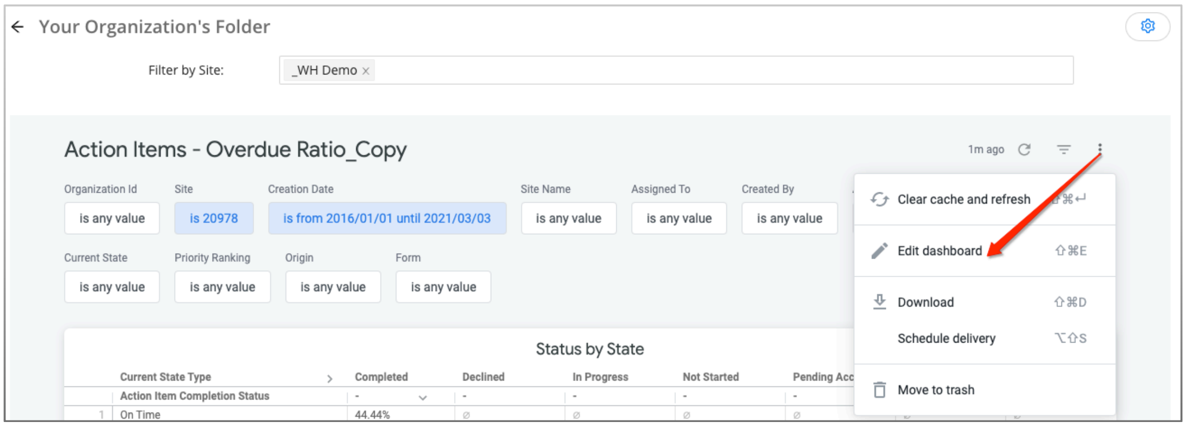
2. Give a **Title** and **Save** in the desired folder.



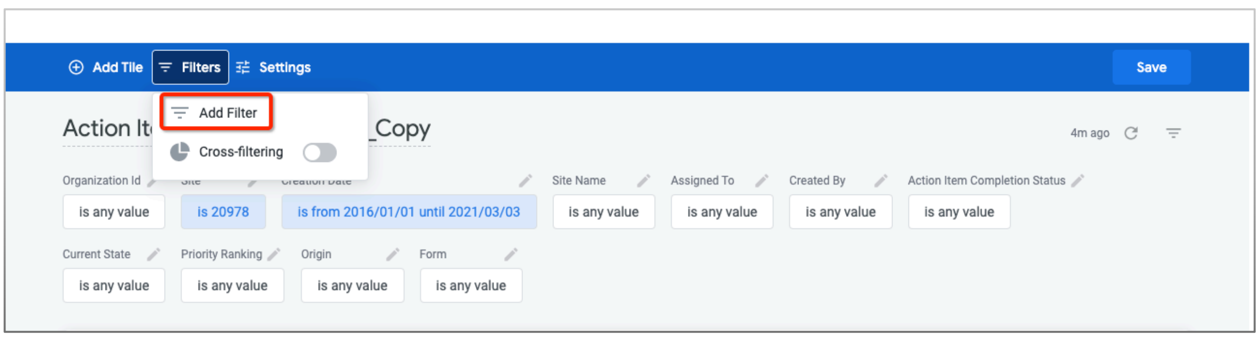
Adding dashboard filters

Steps:

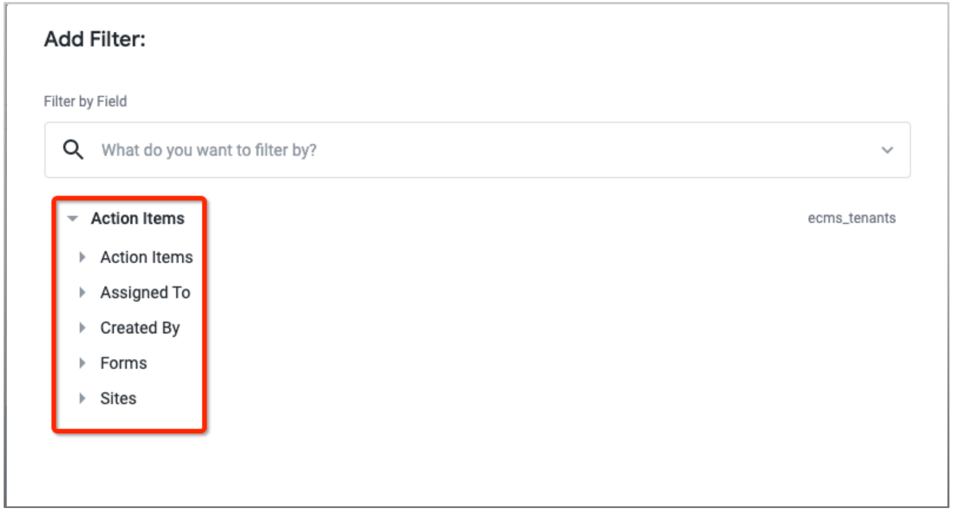
1. Navigate to any of the dashboard in **Your Organisation's Folder or Personal Folder**.
2. Click on three dots on right side of the page→**Edit Dashboard**



3. A Blue toolbar with would appear. Click on **Add Filter**

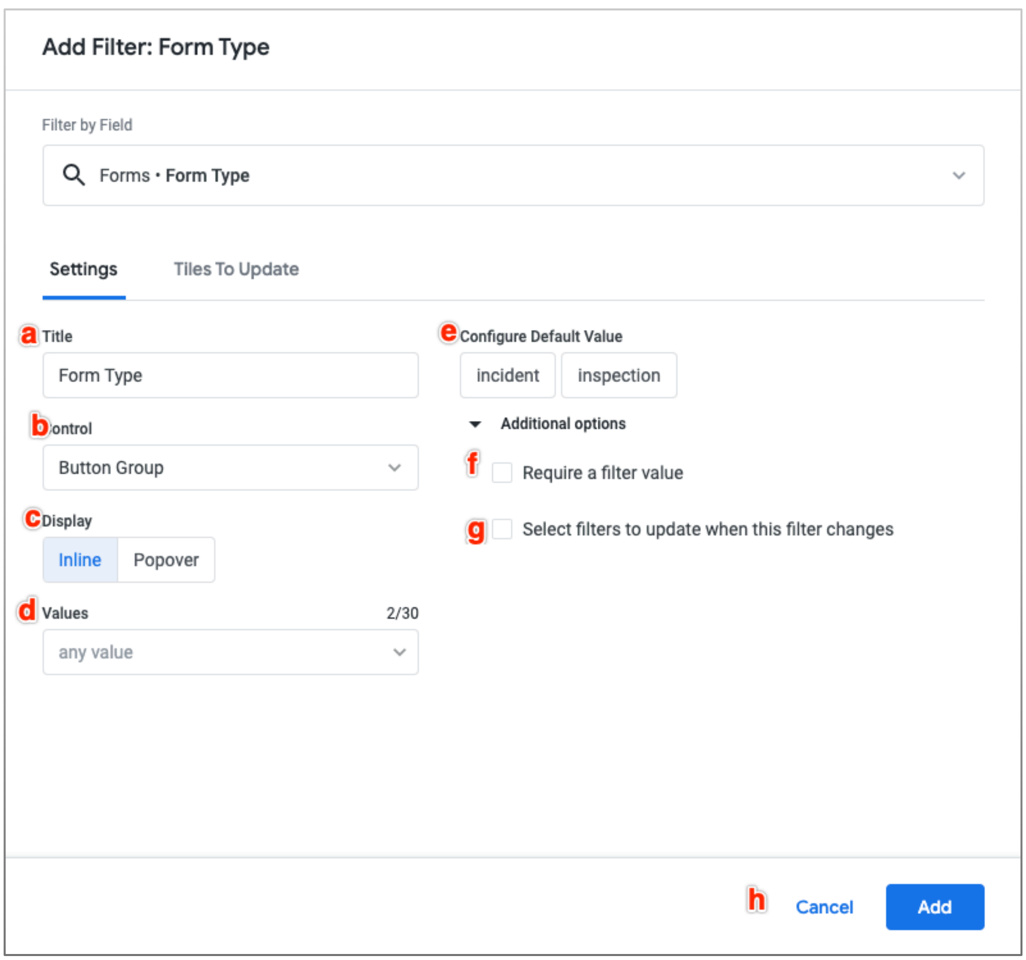


4. **Add Filter** window appears pre-populated with fields from any Explores that are used in the dashboard
5. You can use the search bar to find the field you want to filter by, or you can select it from the drop-down menu



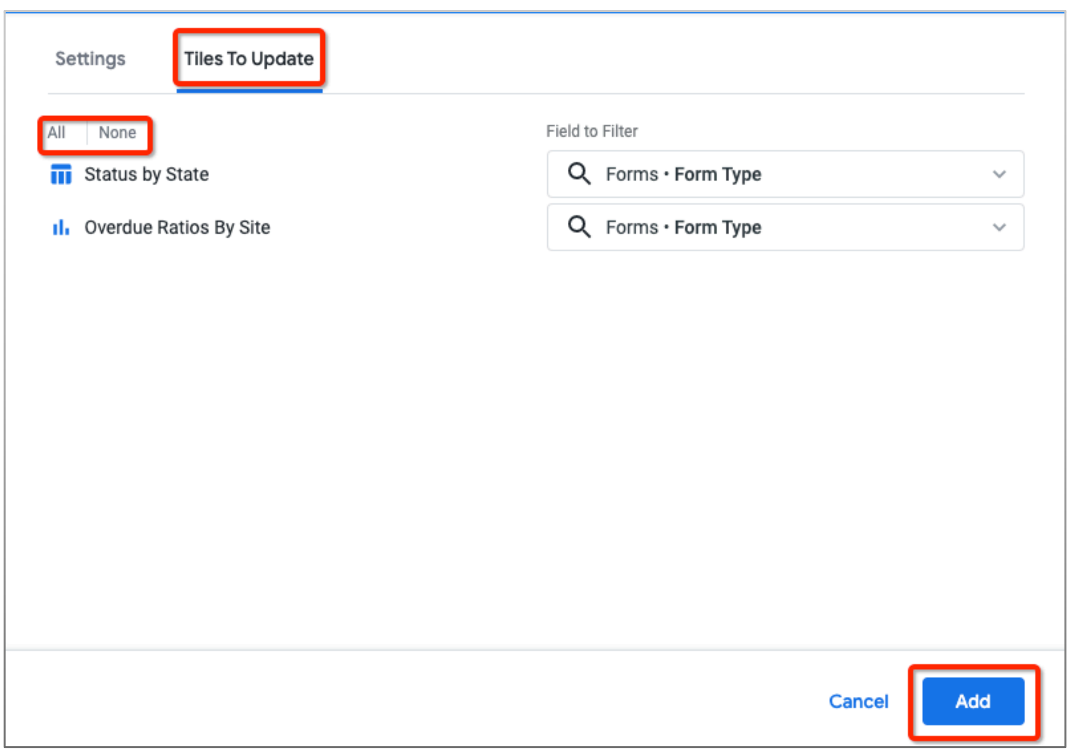
Dashboard filters use fields only from Explores that are used in that dashboard's tiles. You cannot select a field that is already being used by another filter.

6. After you select the field you want to filter by, a filter configuration window appears that allows you to customize your filter settings



a) **Title**: Enter the title of the filter as you want it to appear on the dashboard. The title option pre-populates with the name of the filter-by field.
b) **Control**: Select from a list of control types, which vary depending on the type of data you are filtering.
c) **Display**: For controls that can be displayed as either inline or popover, select how the filter will be displayed.
d) **Values**: To set specific value options for the filter, choose from the drop-down or enter the value options in this field. Leave blank to allow value options from the database to be surfaced, up to the maximum number of values available for that control. For numeric data, this field is replaced by **Min** and **Max** fields.
e) **Configure Default Value**: Optionally, set the default value for the filter.
f) **Require a filter value**: Select the checkbox to require a value for the filter.
g) **Select filters to update when this filter changes**: Select the checkbox to link other filters to this filter. If there are no other filters on the dashboard, this option will be disabled.
h) **Add** and **Cancel**: Click one of these buttons to save or cancel the new filter.

7. **Tiles to Update** tab: User can then select either all or few of the tiles to update with the new filter and then click Add to add the new filter. The new filter would then appear with all the other filters on the dashboard and the selected tiles will be updated with the new filter.



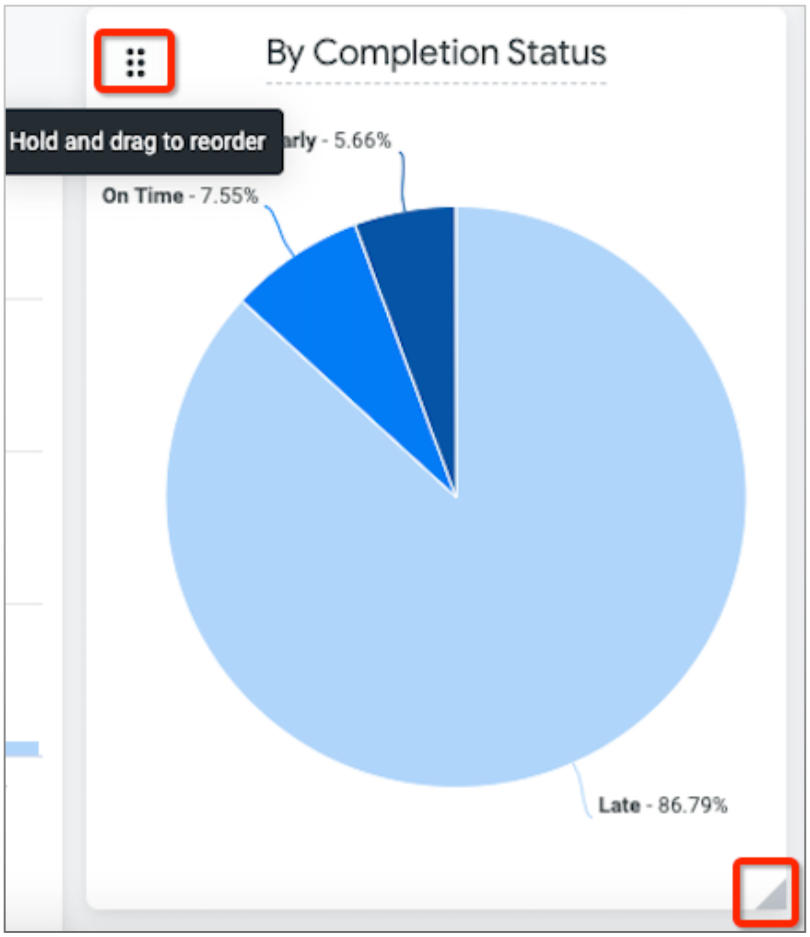
Adding Tiles

To be added

Rearranging and resizing dashboards

When in edit mode, you can move and resize tiles on a dashboard by clicking and dragging.

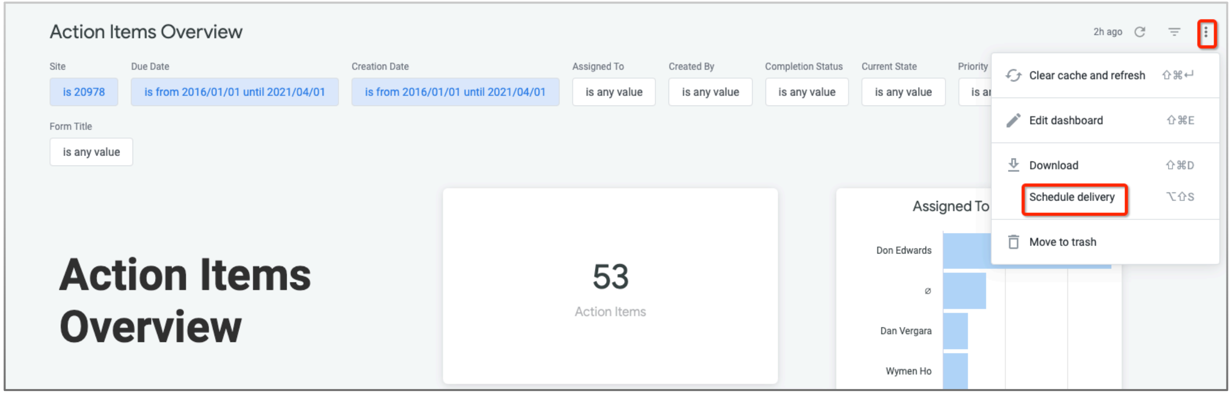
Click and drag on the six-dot icon in the upper left of a tile to move it. Click and drag on the bottom right corner of the tile to resize it.



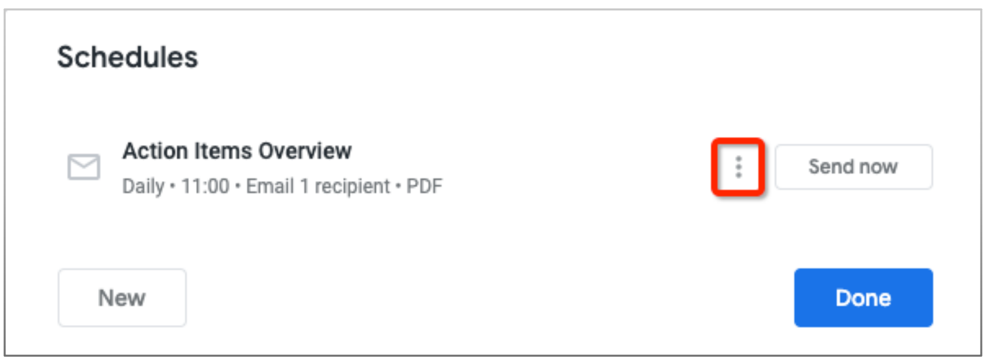
Section 4: Scheduling and sending Dashboards

Users can schedule immediate or recurring delivery of dashboards to anyone in your organization.
Steps:

1. Make sure the dashboard is not in edit mode. Click on three-dot menu in the upper right of the dashboard and choose Schedule delivery.

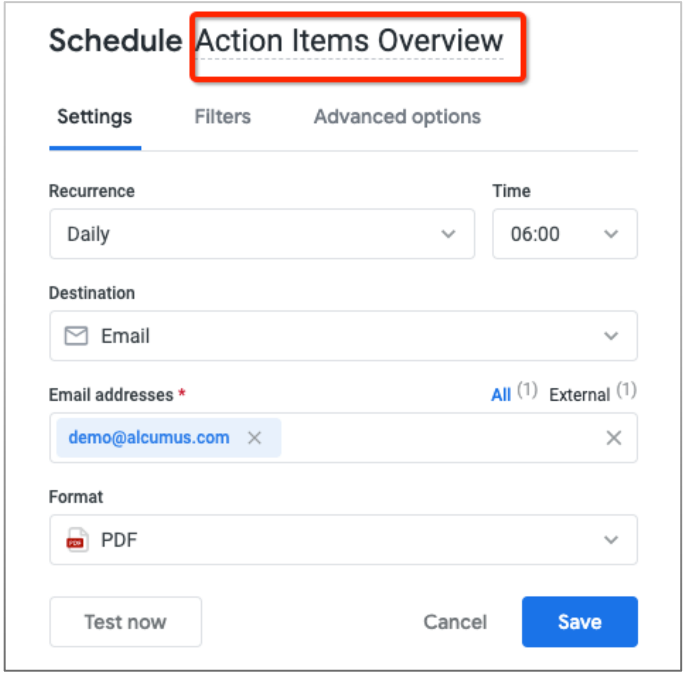


2. Once you click **Schedule delivery**, either an existing schedules window appears or a schedule and send window appears, depending on whether or not you have already created existing schedules on the dashboard
3. **Existing schedules window:** If you have already created schedules for this dashboard, an existing schedules window appears that shows the schedules you have set along with some information about each one, such as destination and format. Deliveries using the Send now recurrence and schedules made by other people do not appear in this window.

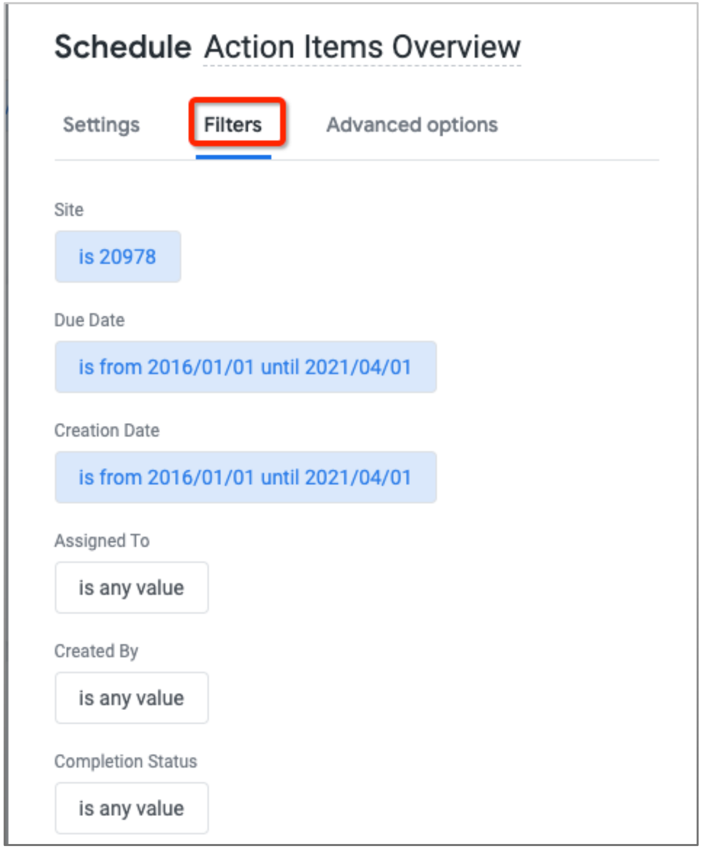


   a. Click **Send now** to send an immediate delivery of existing scheduled content without disrupting the scheduled cadence.
   b. Click the three-dot menu to edit, duplicate, or delete a schedule.
   c. Click **Done** to exit the window.
   d. Click **New** to open the schedule and send window and create a new schedule or immediately send a new delivery.

4. **Schedule and send window:** If you click **New** from the existing schedules window, or, if you do not have any pre-existing schedules for the dashboard, a schedule and send window opens. This window allows you to customize recurrence, destination, format, filters, and more:



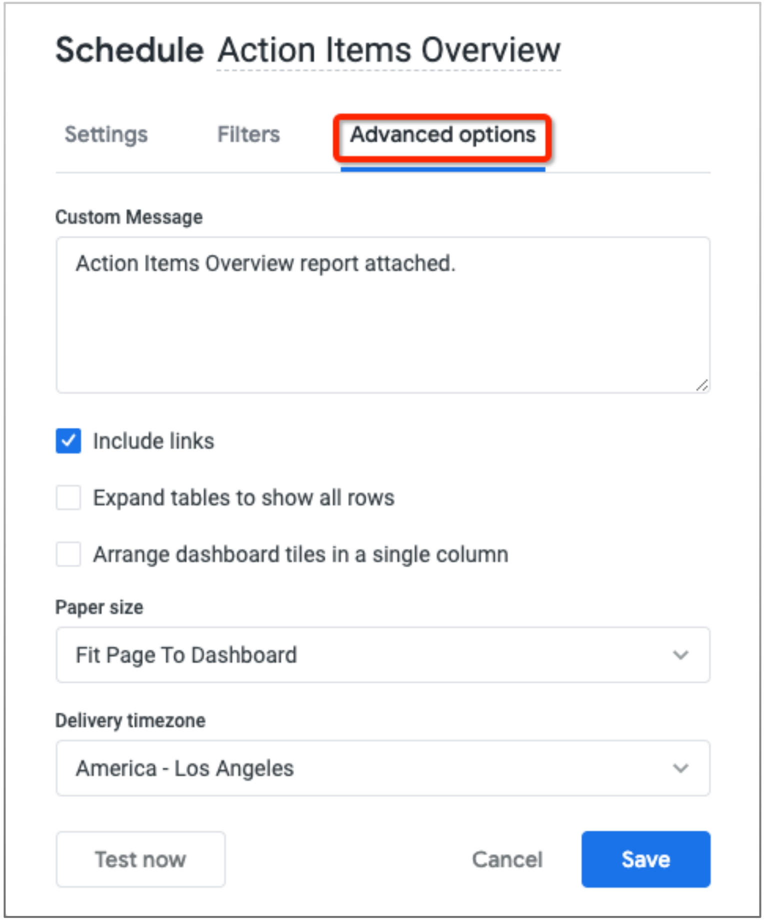
a. The **Settings** tab this in window allows you to customize your delivery's recurrence, destination, format, and more.
b. The top of this window shows the name automatically given to the delivery. The name defaults to the dashboard's name. To edit the delivery's name, click the name (indicated by the dotted underscore), and make your edits
c. The **Filters** tab in this window shows any filters applied to the dashboard as well as their values. In this tab, you can edit the values for any existing filters applied to the dashboard and the new values will be applied to the delivery. The dashboard itself will not be affected.
d. You cannot add filters to your schedule in the Filters tab, only view and edit the values for existing dashboard filters.



When dashboard filters change: Sometimes dashboard filters change after a schedule is created. The table below explains how that affects filters applied to the scheduled deliveries.

Action	Effect on Schedule Filter
A schedule is created with a filter. Later, the filter value is changed on the dashboard.	No effect on the schedule filter value. It remains the value set in the Filters tab, even if that value is is any value
A schedule is created with a filter. Later, the filter is renamed in the dashboard	The filter is removed from the delivered data
A schedule is created with a filter. Later, the filter is deleted in the dashboard	The filter is removed from the delivered data
A schedule is created. Later, a new filter is added to the dashboard	The filter is applied to the delivered data, using the filter value set in the Filters tab. If no value is set in the Filters tab, the value is interpreted as is any value, essentially removing the filter

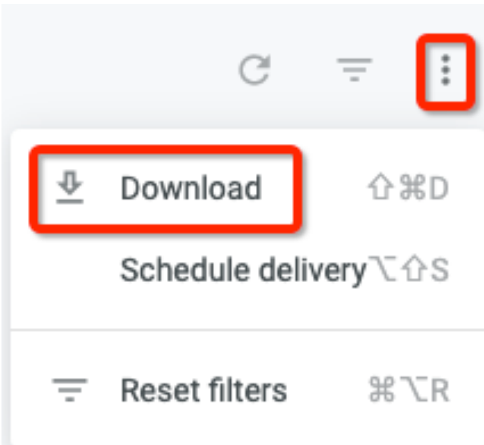
e. In **Advanced Options** tab you can include a custom message for your email delivery



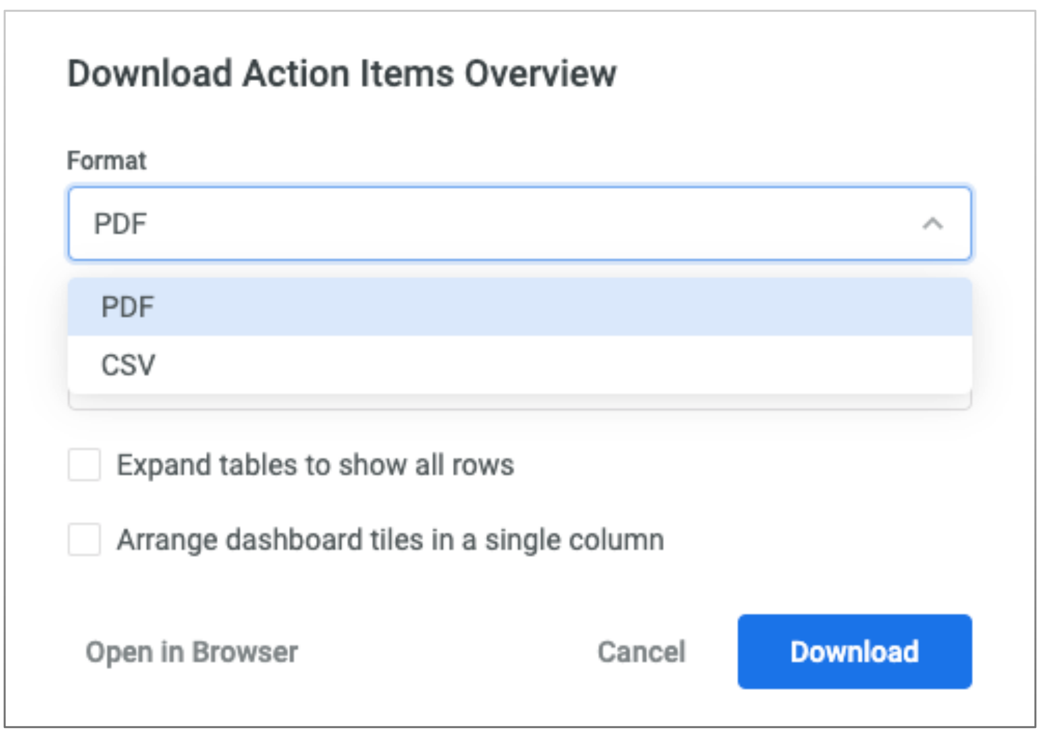
Section 5: Downloading Content

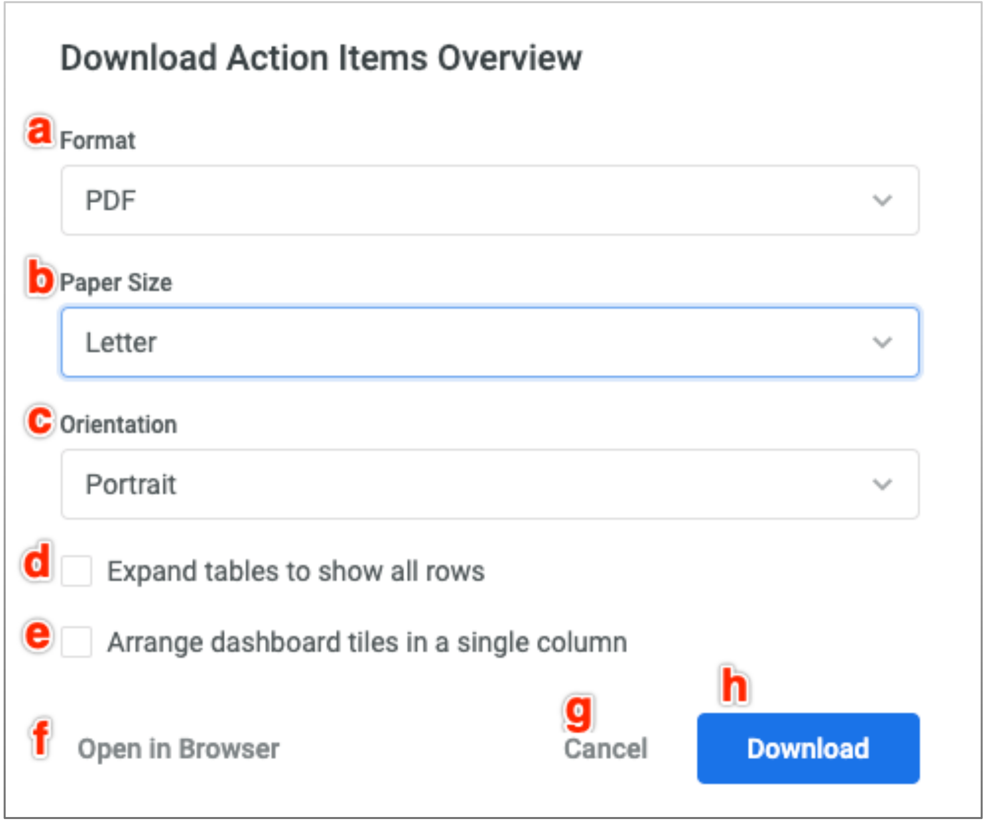
Downloading data from a dashboard

To download the entire dashboard, select Download from the dashboard’s three-dot menu.

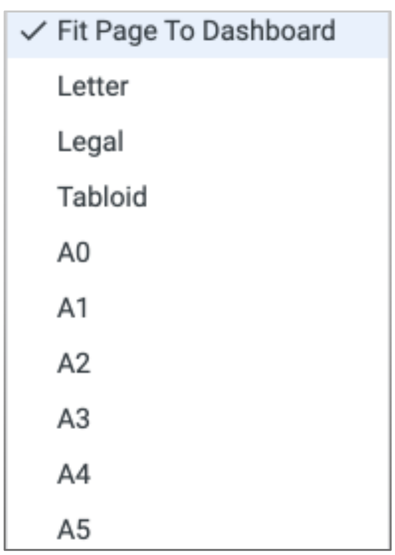


This opens a dialog box that allows you to select PDF or CSV as your download format.





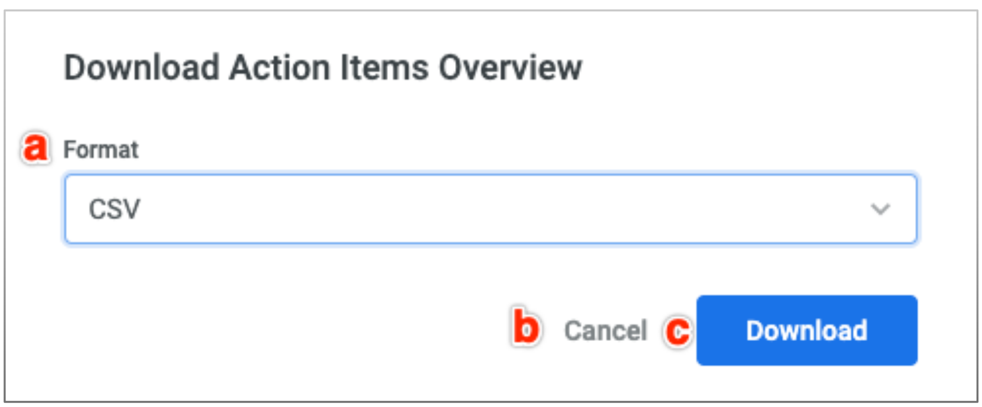
a) Select **PDF** from the **Format** drop-down menu.
b) Select an option from the **Paper Size** drop-down menu. The **Fit Page to Dashboard** option is the default; it sizes the PDF to match the layout of the dashboard on the screen.



c) If you select something other than **Fit Page to Dashboard** in the **Paper Size** drop-down, an **Orientation** option appears. You can choose to orient the dashboard in portrait or landscape position.
d) Select or leave unselected **Expand tables to show all rows**. If you select this option, for dashboard tiles that use table visualizations, the PDF will show all the rows available in the table visualization, not just the rows displayed in the dashboard tile thumbnail. If you do not select this option, only the rows that are seen in the thumbnail without scrolling will appear on the PDF.
e) Select or leave unselected **Arrange dashboard tiles in a single column**. If you select this option, the PDF displays dashboard tiles in a single vertical column. If you do not select this option, the dashboard tiles appear as they are arranged in the dashboard.
f) Click **Open in Browser** to see an image of the PDF in a new tab of your browser. From there, you can opt to download the PDF using your browser's controls.
g) Click **Cancel** if you no longer want to download the dashboard.
h) Click **Download** to initiate the download. A new tab in your browser will open, showing the status of your download.

Downloading a dashboard as CSVs

You can download all the query tiles from your dashboard as a zipped collection of CSV files. Text tiles are not included in the ZIP file. To download your dashboard as a collection of CSV files, follow these steps:



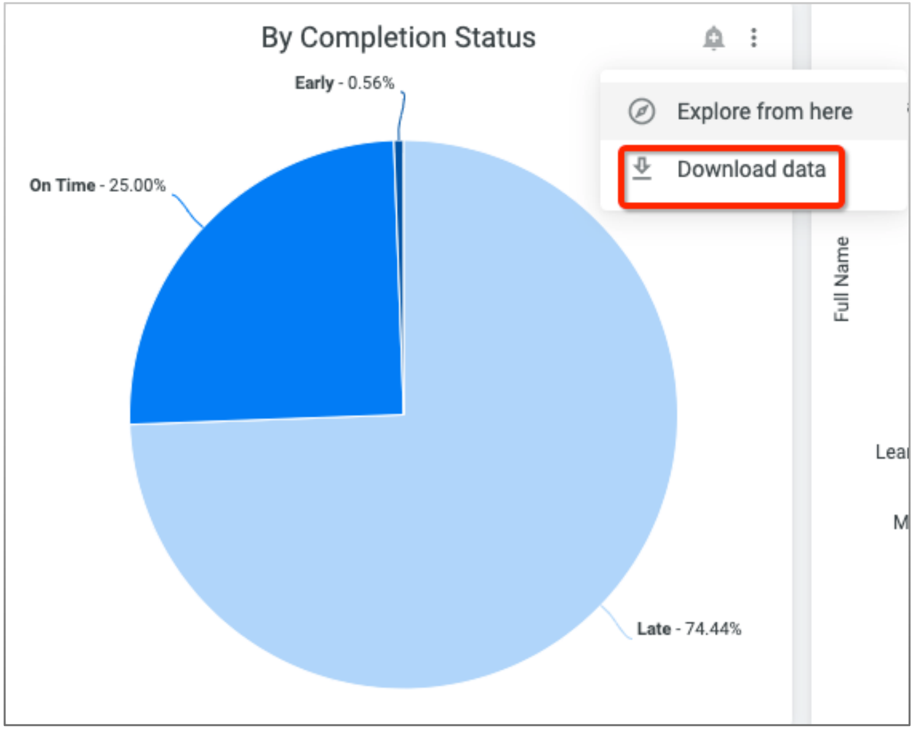
a) Select **CSV** from the **Format** drop-down menu.

b) Click **Cancel** if you no longer want to download the dashboard.

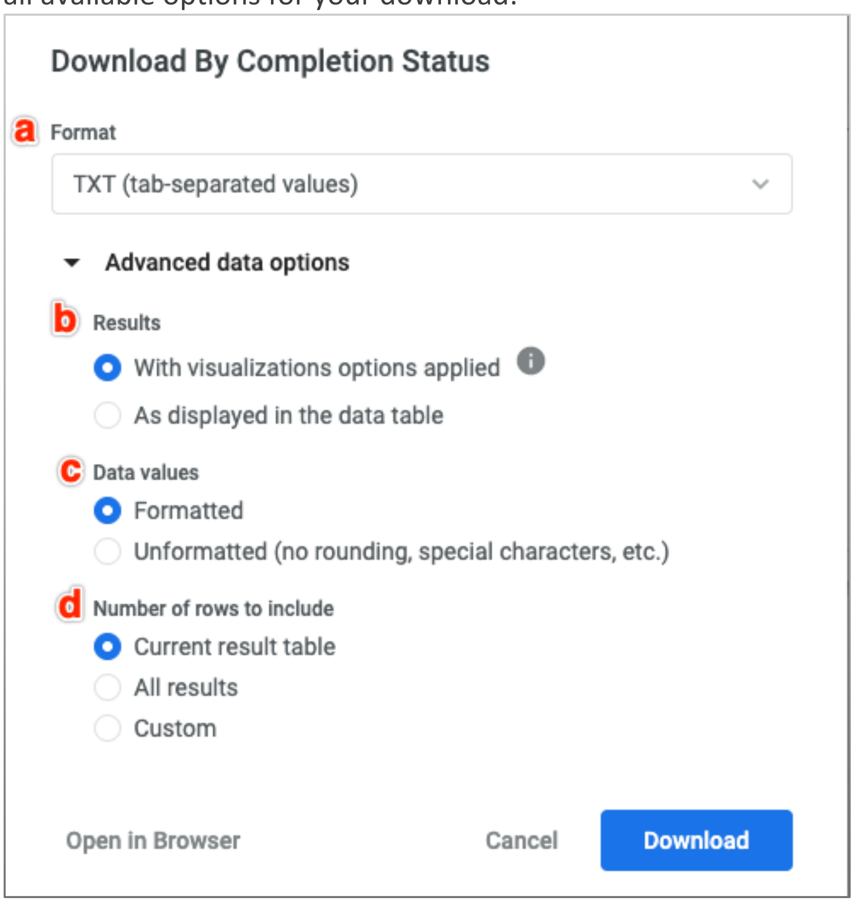
c) Click **Download** to initiate the download your zipped CSV collection.

Downloading data from dashboard tiles

To download the data from a dashboard tile, click the three-dot icon on the tile and select **Download**:



This opens a dialog box with several options. Expand the **Advanced data options** menu to see all available options for your download:



a) Data can be downloaded from dashboard tiles in the following formats:

- TXT (tab-separated values)
- Excel spreadsheet (Excel 2007 or later)
- CSV
- JSON
- HTML
- Markdown
- PNG (image of visualization)

Depending on the format you select, some options in the **Advanced data options** menu may not be available.

b) In the **Results** section, choose whether you want visualization settings applied to your data download. If you choose **As displayed in the data table**, visualization options will not be applied, and the download will appear like the data table in the **Data** section of the tile's underlying data table.

c) In the **Data values** section, choose how you want the downloaded results to appear:

- If you choose **Formatted**, the data will appear more similar to the Explore experience in Looker.
- If you choose **Unformatted**, Looker does not apply any special formatting of your results, such as rounding long numbers or adding special characters may have been put in place. This is often preferred when data is being fed into another tool for processing.

d) You can specify how much data is included in your download in this section. In most tiles, this section of the download pop-up is named **Number of rows to include**; if the tile query contains any pivoted dimensions, this section is named **Number of rows and columns to include**. Your options include:

- **Current result table**: Number of rows specified by the row limit — and column limit, if the tile query contains at least one pivoted dimension — of your tile's underlying data table.
- **All results**: The maximum Looker can display is 5000 rows. Check this option when you need to when you need to download complete data.
- **Custom**: A custom number of rows to download. The maximum Looker can display is 5000 rows.

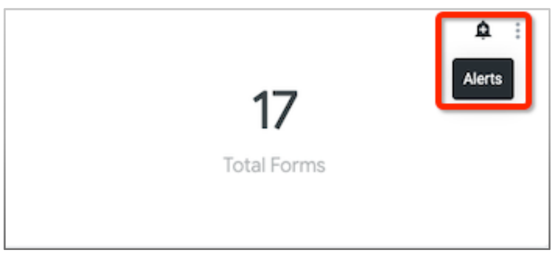
Section 6: Sending conditional alert notifications

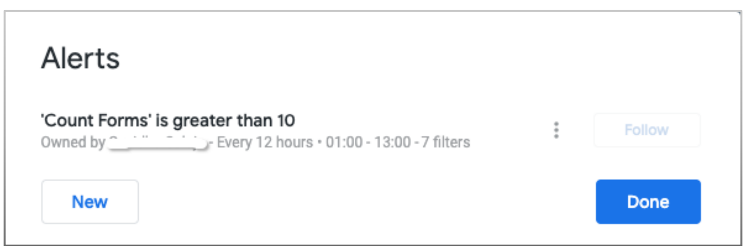
With conditional alerts, you can specify conditions in your data that, when met or exceeded, trigger a notification to be sent at a desired frequency to specific recipients.

Creating an Alert

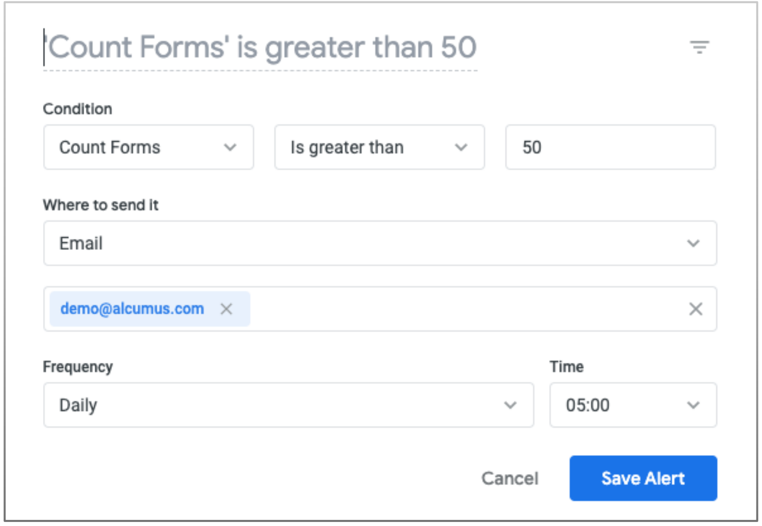
Your dashboard must be out of edit mode to create alerts. Alerts can only be set on tiles that have at least one numeric measure or table calculation in the tile's visualization.
Steps:

1. Click the bell icon and then click the **New** button at the bottom of the list of existing alerts. If no alerts currently exist for that tile, clicking the bell icon will open the alert creation pop-up.





2. In the alert creation pop-up, you can specify several components of your alert:



Custom Title: The default alert title indicates which conditions need to be true for the alert to be triggered. If you would like to rename your alert, click the three-dot menu, and then click **Edit Alert**. Click once on the alert title, enter a custom title, and then click away from the field or hit the **Enter** key to see your update. Click **Save Alert** to save your new title. Your custom alert title will appear in any publicly visible alerts listed in the alert view pop-up on that tile. The custom title will also appear in the alert notifications.

Alert Condition: In the **Condition** drop-down in the alert creation pop-up, you can set alert conditions for numeric measures or table calculations in the tile's query visualization.

Recipients: Each recipient will receive an email with information about the alert and an option to unfollow the alert. If they choose to unfollow the alert, their email address will be removed from the recipient list.

Frequency: You can set the frequency at which system will check your data for changes and to send an alert notification if the alert conditions are met. The default frequency is **Daily** at **05:00**. For **Hourly** and **Minutes** frequency, **Start** and **End** times are inclusive. For example, if you set **Check every** to **12 hours** with a **Start** time of **05:00** and an **End** time of **17:00**, Looker will check the data at 05:00 *and* 17:00.

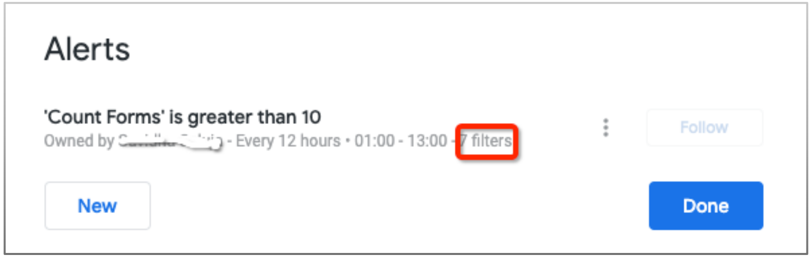
3. Click on **Save Alert.** Alert created will now appear in Alerts pop-up.

Dashboard filters in Alerts

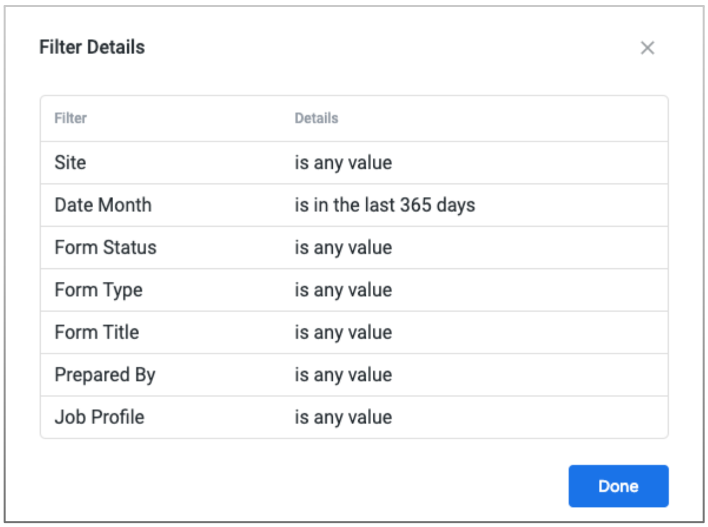
Alerts will take into account the standard dashboard filters that exist when the alert is created. If any dashboard filters are added or modified, the existing alerts will not incorporate those additions or changes, and you must create a new alert to capture those filter updates.
You can see which dashboard filters apply to the alert in two places:

- In the list of alerts in the alert view pop-up
- In the alert creation pop-up

In the alert view pop-up, click the filter link under the alert:



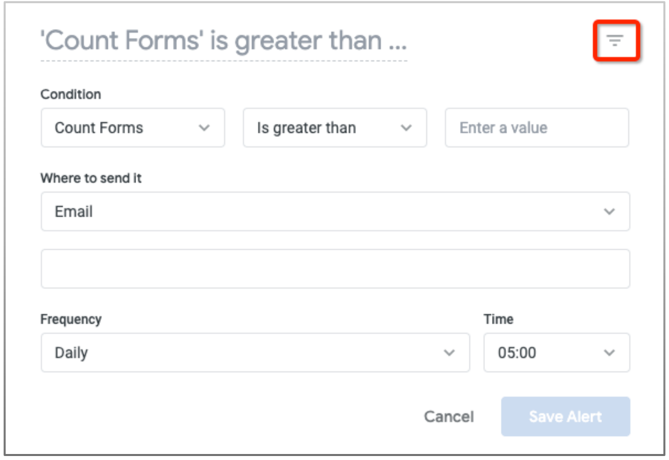
This opens a pop-up with additional details about the dashboard filters that are applied to that alert.



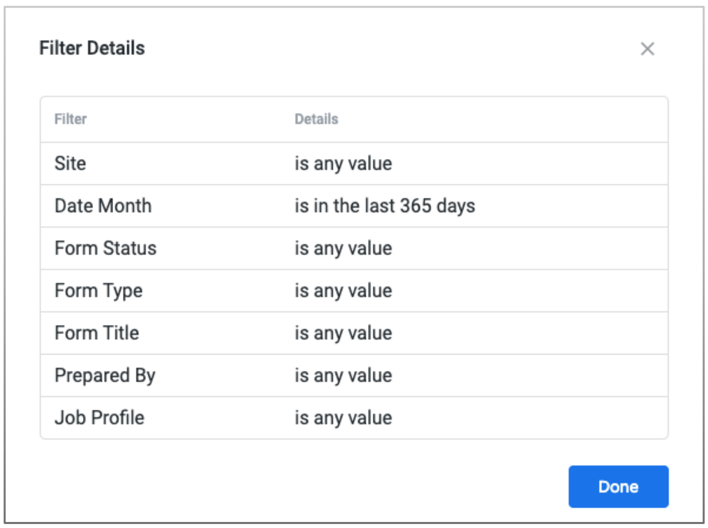
Filter	Details
Site	is any value
Date Month	is in the last 365 days
Form Status	is any value
Form Type	is any value
Form Title	is any value
Prepared By	is any value
Job Profile	is any value

Click **Done** to close the filter detail pop-up.

You can also see which dashboard filters would apply to an alert as you create it. In the alert creation pop-up, click the filter icon in the upper right corner.



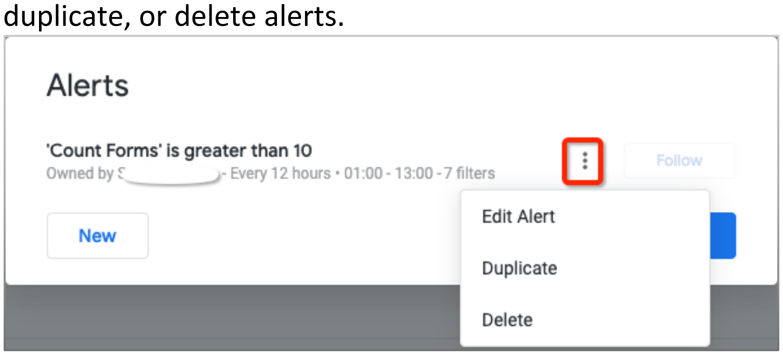
This opens a pop-up with additional details about the dashboard filters that would be applied to your alert once you create it.



Click **Done** to close the filter detail pop-up.

Modifying an Alert

Click the three-dot menu to the right of the alerts listed in the alert view pop-up to edit, duplicate, or delete alerts.



- To edit an alert, click **Edit Alert** to open a pop-up to edit the existing alert settings; when you're finished editing, click **Save Alert**.
- To duplicate an alert, click **Duplicate** to open a pop-up pre-populated with the existing alert settings, and then click **Create Alert**. Duplicating an alert creates a new alert with identical tile settings to the original alert. The duplicated alert query will check if conditions are triggered based on the dashboard and tile settings at the time the *original* alert was created. If any user has made changes to the dashboard or tile since the creation of the original alert, the duplicated alert will not pick up those changes.
- To delete an alert, click **Delete**, and then confirm in the resulting pop-up. Click **Done** to close the alert view pop-up.

Receiving an alert notification

Once the alert is triggered, any specified recipients will receive an email notification at the specified frequency that includes:

- A link to the dashboard for the tile on which the alert is based (*Note: Please do no click on the link. It does not work as of now)*
- The value that triggered the alert
- Options to unfollow or, depending on your permissions and who owns the alert, to edit the alert

If you choose to unfollow the alert, you will be removed from the alert's recipient list and will no longer receive notifications when the alert is triggered. If you unfollow on behalf of a group email address, group members will no longer receive notifications when that alert is triggered.

Section 7: Editor and Viewer user access details

The below list shows what actions a user with Editor or Viewer permissions can perform in the new Safety Intelligence module.

Actions Allowed	Editor Access	Viewer Access
Edit Dashboard	Yes	No
Edit Dashboard on Home Page	Yes	No
Add Filters	Yes	No
Add Tile	Yes	No
Edit Tile	Yes	No
Save As (Dashboard)	Yes	No
Download (Dashboard)	Yes	Yes
Download Data (Look)	Yes	Yes
Schedule delivery	Yes	Yes
Set up Alerts	Yes	No
Delete Dashboard	Yes	No
Apply Site Filter	Yes	Yes
View Popular dashboards	Yes	Yes
Filter data	Yes	Yes
Embed Link	Yes	Yes
View embedded dashboards	Yes	Yes

Glossary

Common Terms

Dashboard
A dashboard is essentially a collection of one or more saved queries, displayed as visualization or text tiles together on one page.

Explore (n.)
An Explore is the starting point for queries. An Explore shows a specified set of fields from its associated view file, and these fields can be selected from the field picker to construct a query, which can be saved as a Look or dashboard tile. Explore URLs can also be shared.

Look (n.)
A Look is a single table or visualization saved as its own individual report. Looks can be added to dashboards, scheduled and shared. Any changes made to a Look will be reflected in any dashboards that contain it.

Tile
Tiles are visualizations added to a dashboard from an Explore or a Look. Tiles can be query-based or Look-linked. Query tiles differ from Look-linked tiles because they are stored only on dashboards.

Understanding Date Filters

Today	31-Mar-21	
Timeframe		
(both days inclusive)	From	To
Last 7 days	25-Mar-21	31-Mar-21
Last 14 days	18-Mar-21	31-Mar-21
Last 28 days	4-Mar-21	31-Mar-21
Last 30 days	2-Mar-21	31-Mar-21
Last 90 days	1-Jan-21	31-Mar-21
Last 180 days	3-Oct-20	31-Mar-21
Last 365 days	1-Apr-20	31-Mar-21
Week is from Monday to Sunday		
This week	29-Mar-21	4-Apr-21
This Month	1-Mar-21	31-Mar-21
This Quarter	Jan	March
This Year	2021	2021
	01-Jan	31-Dec

Previous Week	Last Monday	Last Sunday
Previous Month	1st of previous month	last date of previous month
Previous Quarter	1st of previous quarter	last date of previous quarter
Previous Year	2020	2020
	01-Jan	31-Dec
Advanced		
	From	To
is in the last complete 1 week	Last Monday	Last Sunday
Is in the last 1 week (is current week)	29-Mar-21	4-Apr-21