How to Create Solution Widgets with TSIA's Solution Widget Dashboard

Overview of the dashboard:

- **Results Summary Worksheet**
  - *Service Business Challenges (SBC) Dropdown*
    - SBC selections filter as you type
    - The dashboard was designed assuming only one SBC will be selected at a time
      - Following this rule will lead to the most consistent experience
      - That said, it is recommended to select no more than 5 SBCs
  - *Number of Results*
    - Shows the total number of documents returned for the selected SBC(s)
    - It will update as filters are applied/removed
  - *Filters*
    - Publication Year
      - Filters content based on the year(s) selected
      - The years available for selection are the current year and previous four years
    - Results by Type
      - Research Report
        - Clicking this bar will filter out conference presentations
        - Applying this filter will clear out the Conference Breakdown section
        - To undo this filter, simply re-click the bar
      - Conference Presentation
        - Clicking this bar will filter out research reports
        - Applying this filter will clear out the Research Report Subtypes section
        - To undo this filter, simply re-click the bar
    - Research Report Subtypes
      - The Subtype refers to what kind of report it is (e.g. DataView, Service Insight, Executive Insight, Technology Insight)
      - Clicking one of the subtype bars will filter out all other subtypes
        - Holding down CTRL when clicking will allow for multiple subtype selections
      - Applying this filter will clear out the Conference Presentation Type bar
      - Applying this filter will clear out the Conference Breakdown section
    - Conference Breakdown
      - Conference Breakdown will show how many presentations TSIA had at each conference

- Clicking one of the conference bars will filter out all other conferences
  - Holding down CTRL when clicking will allow for multiple conference selections
- Applying this filter will clear out the Research Report Type bar
- Applying this filter will clear out the Research Report Subtypes section
  - *Results by Year*
    - Shows the number of publications by year
    - The total number will equal the number shown under Number of Results
    - Will update based on any and all applied filters
- **Research Report Worksheets**
  - *Recent Related Research Reports*
    - SBC Name(s) shown near the top of the worksheet
    - Shows all research reports published in 2014 & 2015
      - To view a report, click the URL in the far-right column
      - The first click will open a new tab in your browser, any subsequent click within that worksheet will open in that same tab
        - As such, cannot open a tab for every URL all at once
        - However, each worksheets' browser tab is unique to the worksheet
  - *Older Related Research Reports*
    - SBC Name(s) shown near the top of the worksheet
    - Shows all research reports published in 2011, 2012, & 2013
      - To view a report, click the URL in the far-right column
      - The first click will open a new tab in your browser, any subsequent click within that worksheet will open in that same tab
        - As such, cannot open a tab for every URL all at once
        - Since each browser tab is unique to the worksheet it opened from, any clicks in this worksheet will not overwrite a tab opened from another worksheet
  - *Columns found in these two worksheets are…*
    - Year
      - Can toggle by ascending or descending order
    - Title
      - Can toggle by alphabetical or reverse alphabetical order
    - Service Discipline(s)
      - If you are not subscribed to the discipline(s) listed, you cannot download the report
    - Full URL
- **Conference Presentation Worksheets**
  - *Recent Related Conferences*
    - SBC Name(s) shown near the top of the worksheet
    - Shows all conference presentations published in 2014 & 2015
      - To view a presentation, click the URL in the far-right column

- The first click will open a new tab in your browser, any subsequent click within that worksheet will open in that same tab
  - As such, cannot open a tab for every URL all at once
  - Since each browser tab is unique to the worksheet it opened from, any clicks in this worksheet will not overwrite a tab opened from another worksheet
  - *Older Related Conferences*
    - SBC Name(s) shown near the top of the worksheet
    - Shows all conference presentations published in 2011, 2012, & 2013
      - To view a presentation, click the URL in the far-right column
      - The first click will open a new tab in your browser, any subsequent click within that worksheet will open in that same tab
        - As such, cannot open a tab for every URL all at once
        - Since each browser tab is unique to the worksheet it opened from, any clicks in this worksheet will not overwrite a tab opened from another worksheet
  - *Columns found in these two worksheets are…*
    - Year
      - Can toggle by ascending or descending order
    - Title
      - Can toggle by alphabetical or reverse alphabetical order
    - Speakers
    - Full URL
    - No service discipline listed because presentations are available to all members, regardless of discipline subscriptions
- **Navigating the Worksheets**
  - Can click individual worksheets and can move left or right using the provided arrows
  - Can use the dropdown arrow to the far left as well to move to a specific worksheet
- **Downloading a Solution Widget to PDF**
  - At the bottom of the dashboard, a "Download" button is provided
    - Once clicked, click the "PDF" option
    - This will launch the "Export to PDF" pop-up…
      - Select the option "Sheets in Workbook" under the "Content" header
      - Once that is selected, click "Export", then "Download"
  - Once downloaded to PDF, the widget is no longer editable
  - This is a good way to allow opening of multiple URLs from the same worksheet and avoiding the browser tab limitation previously discussed
  - One limitation to this route is that a URL spanning two rows will not open correctly
    - Work around is to…
      - Right click anywhere in the PDF within Adobe Reader
      - Click "Select Tool"
      - Highlight URL & copy the URL
      - Paste URL into browser