



Magic Visuals & Dashboards with Enrole

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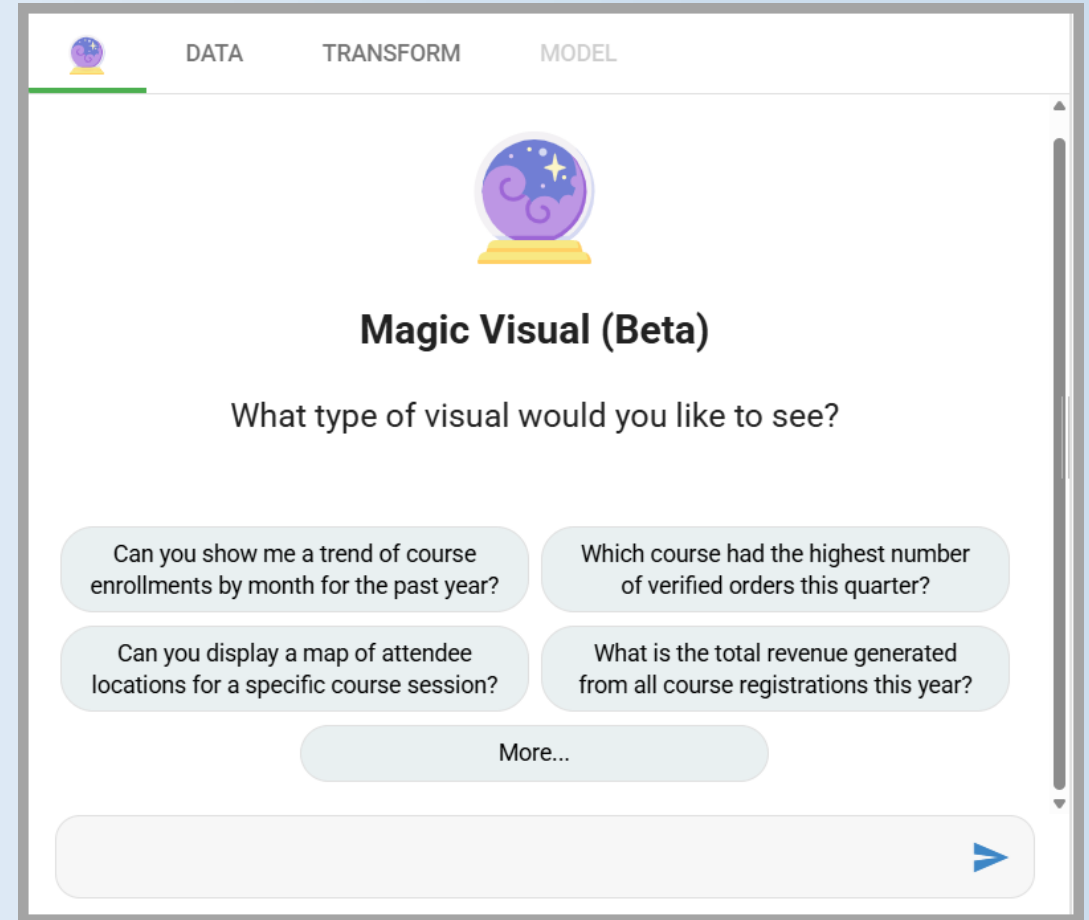


Agenda

1. Introduction
2. Magic Visuals Definition
3. Magic Visuals User Experience
4. Dashboards Definition
5. Dashboards User Experience
6. Recap

Magic Visuals Definition

- Dynamic, interactive visualization that allows users to explore data in real time
- Sourced from an Informer 5 Dataset
- Helpful for quick understanding of Enrole data with minimal effort through using AI
- Uses Informer AI resources, enabled under Administration



Magic Visuals User Experience: Create

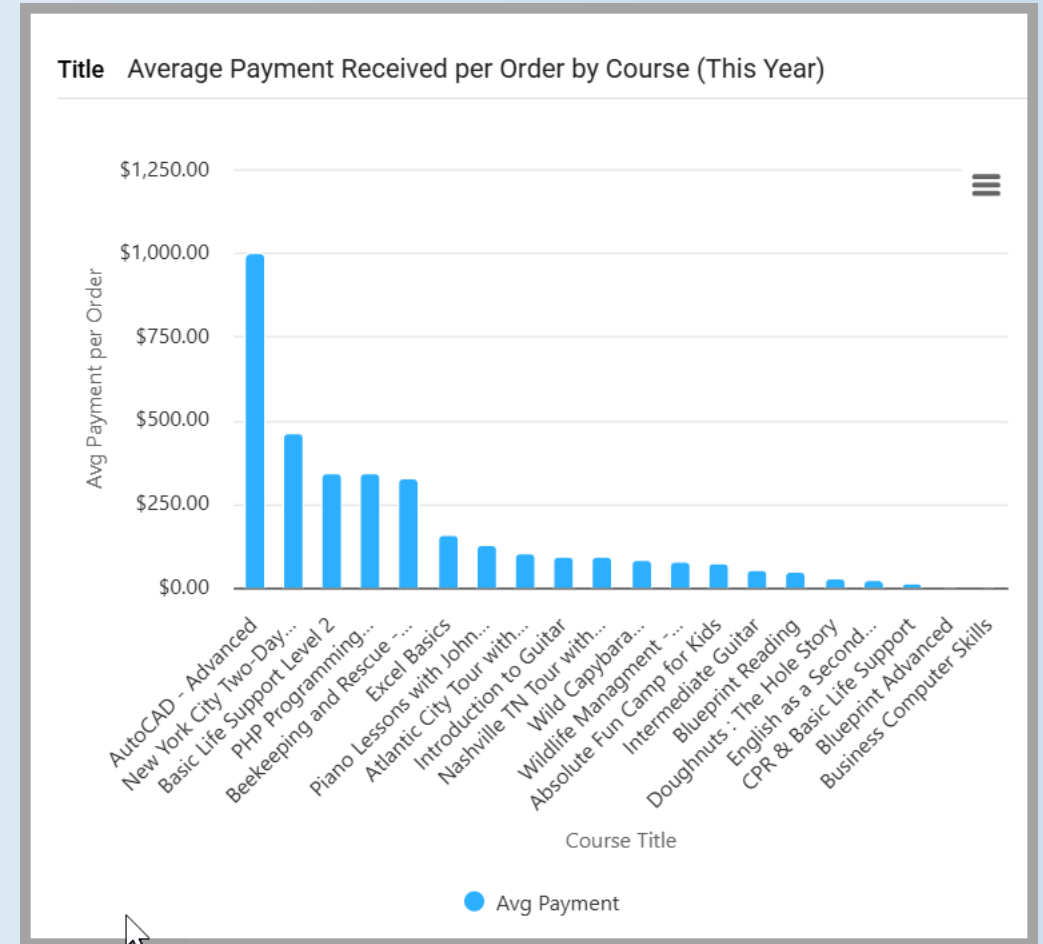


1. Navigate to Dataset Visual page.
2. Select “Magic Visual (Beta).”
3. Select or submit a prompt.

Example prompt:

- What is the average payment received per order for each course this year?

To start over, click “refresh” icon to right of prompt bar.

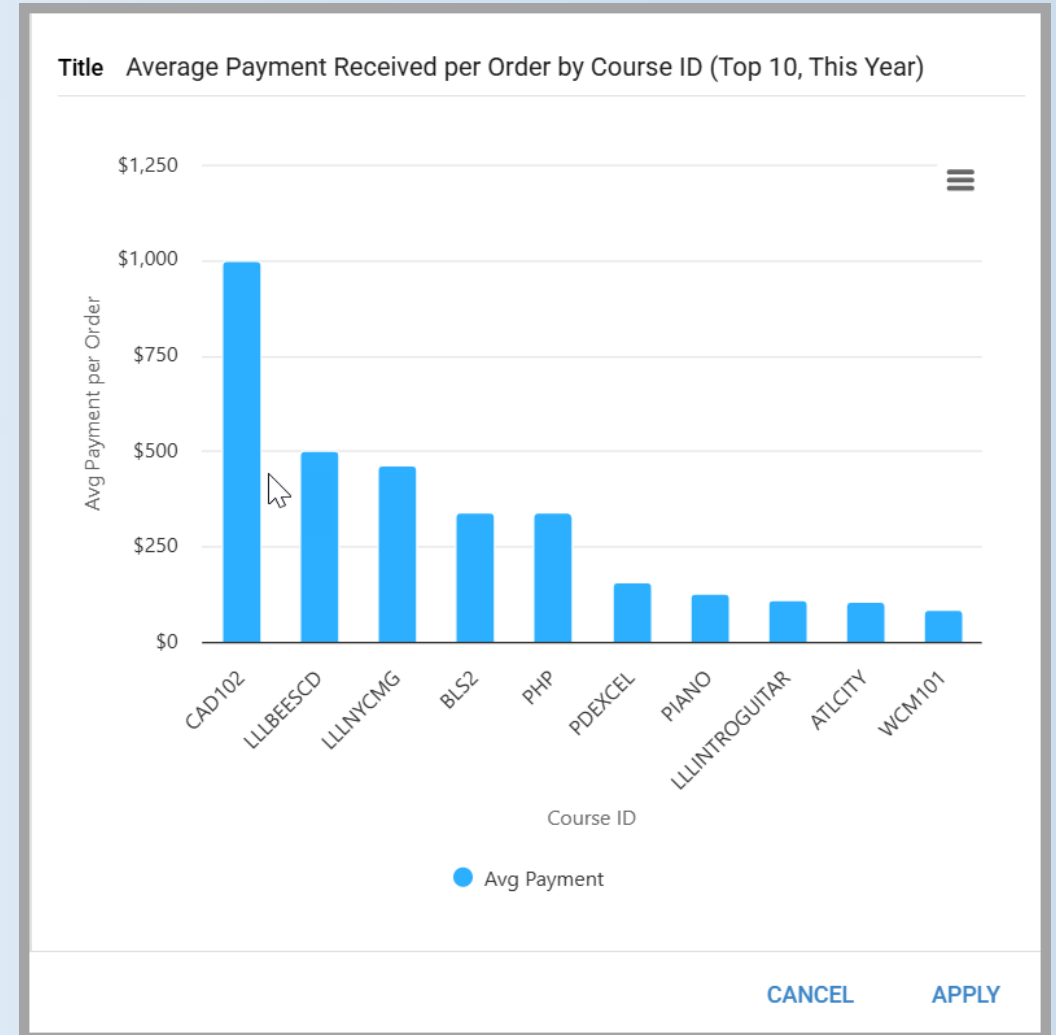


Magic Visuals User Experience: Customize entrinsic

1. View original results.
2. Consider possible customization.
3. Submit prompt to customize existing visual.

Example customization prompts:

- Try again using Course ID instead of Course Title, and including only top 10.
- Try again without decimal places on the average payment per order.



Magic Visuals User Experience: Interact



1. Click “APPLY.”
2. View in Dataset Visuals list.
3. Interact in same ways as with other visuals.

Example actions:

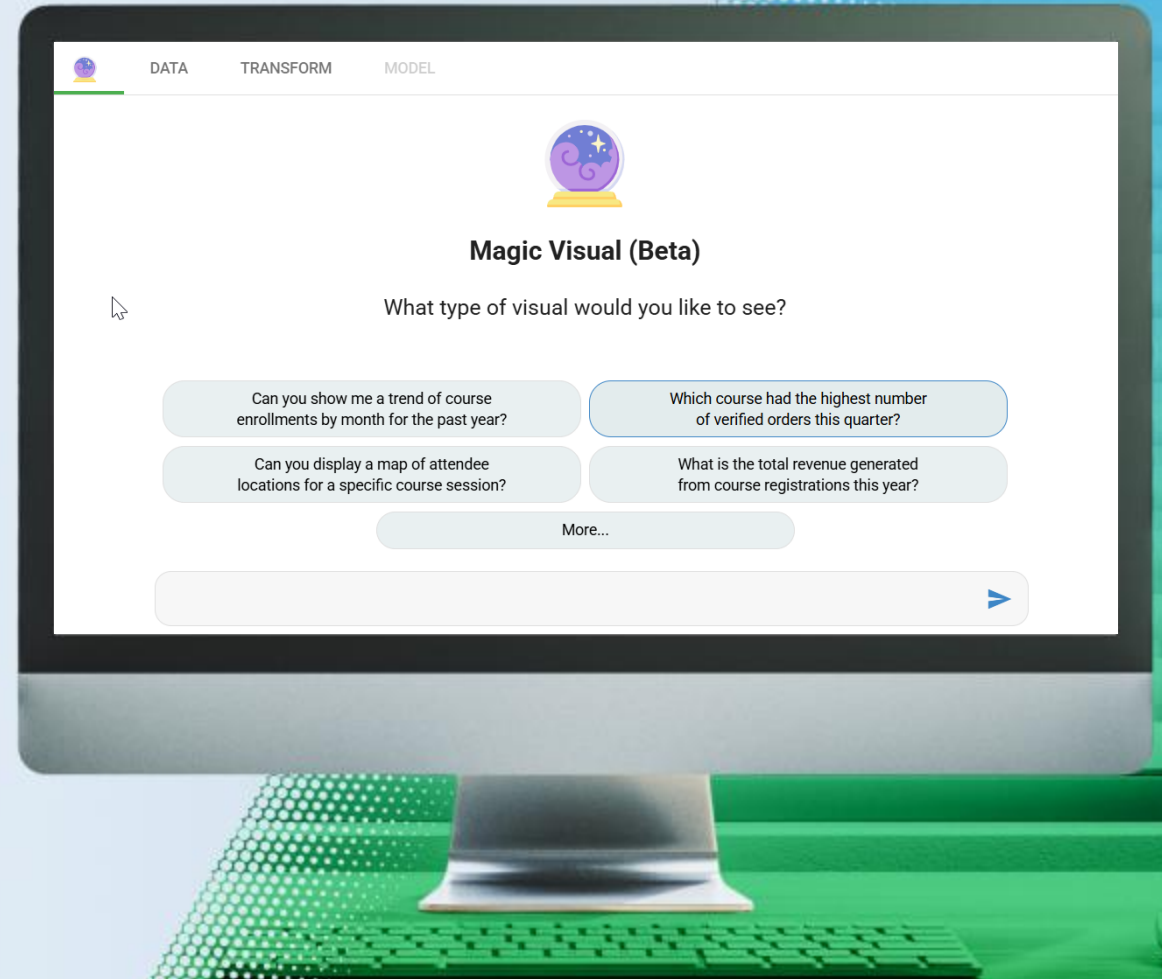
- Filter
- Edit Name/Description
- Add home page
- Add to a Dashboard

The screenshot displays the "Visuals" section of a software interface. At the top, there is a "+ NEW" button, a search bar, and a "Types" dropdown menu. Below this is a table with columns for "Visual", "Information", and "Type". The table lists several visualizations, with the first one, "Average Payment Received per Order", highlighted in blue. The table also includes a "Visual" column with an upward arrow icon.

Visual	Information	Type
Average Payment Received per Order	Top 10 courses by average pay...	Magic (Beta)
Company Name	Count	Stacked Bar Chart
Company Name	Count	Pivot Table
Count	Count	Gauge
Course ID by Sess Start Dt Year	Sum Ord Fee, Count	Pivot Table
Course TITLE by Sess Start Dt Quart	Sum Ord Fee, Count	Pivot Table
Location	Count	Heat Map of Us-All
Sess Start Dt	Count	Trend Chart

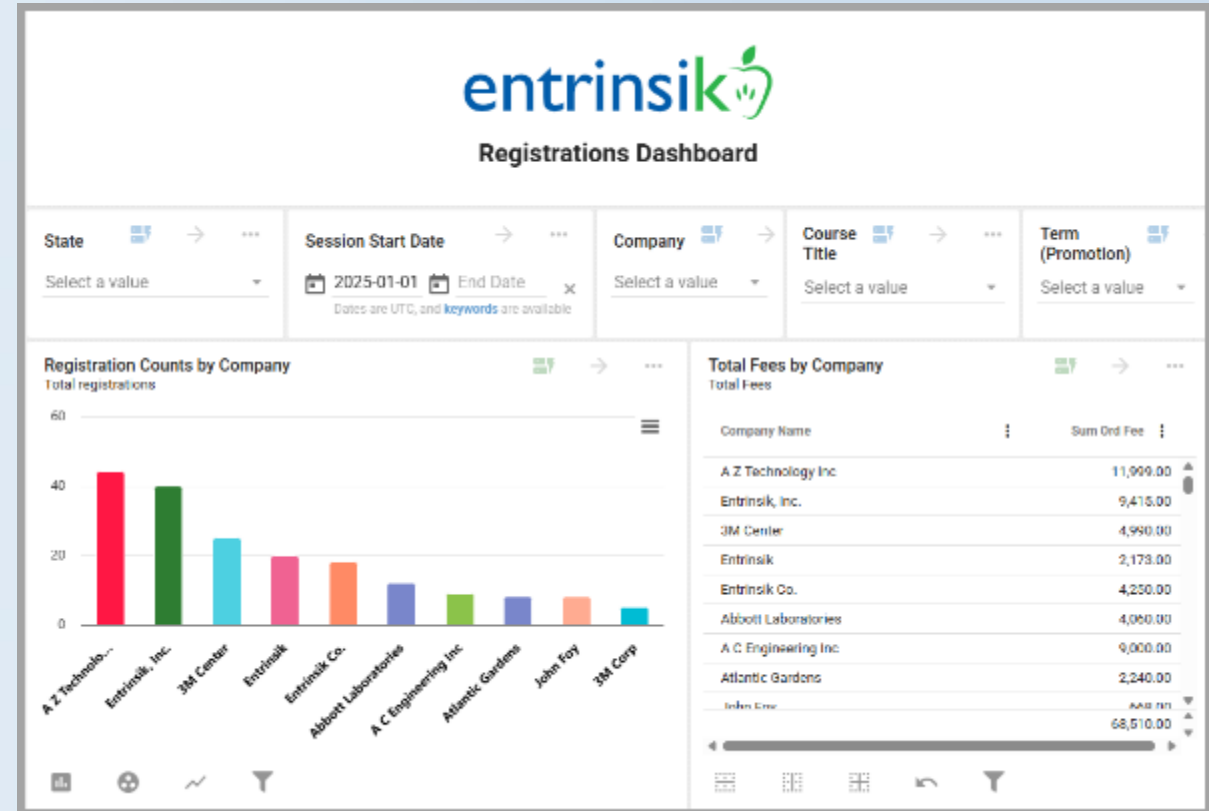
Magic Visuals User Experience: Demo

- View & run Dataset
- Click “Visuals” option
- Click “+ NEW”
- Click “Magic Visual (BETA)”
- Create: Select or submit prompt
- Customize: Submit a further prompt
- Interact: Click “APPLY” and use as visual



Dashboards Definition

- Canvas presenting a collection of Visuals sourced from one or more Datasets
- Renders dynamically from inputs and filters
- May be shared through external link
- In edit mode, accommodates use of Magic Visuals



Dashboards User Experience: Create



1. View & run Dataset(s).
2. Click "+ NEW."
3. Select "Report" and "Dashboard."
4. Submit Name, Description, & Dataset selection.
5. Add Elements:
 - Magic Visual
 - Panel
 - Discover
 - Saved Visuals
 - New Visuals
6. Save.

The screenshot shows a form titled "Dashboard" with the subtitle "A layout designer for Visuals". In the top right corner, there is an icon of a computer monitor displaying a bar chart and a pie chart. The form contains three main sections: "Name *" with the value "Registrations Dashboard" and a character count "23 / 70"; "Description" with the value "Registrations statistics by Course, Company, Session Start"; and "Select Dataset" with the value "Registration List by Session (Enrole Training) Copy". At the bottom right, there are two buttons: "CANCEL" and "SAVE". A mouse cursor is visible over the "SAVE" button.

Dashboards User Experience: Customize



1. View Dashboard.
2. Click "EDIT REPORT."
3. Use Dashboard Editor.
4. Add & remove Datasets.
5. Customize Elements:
 - Add & remove
 - Filter
 - Resize & move
6. Save.

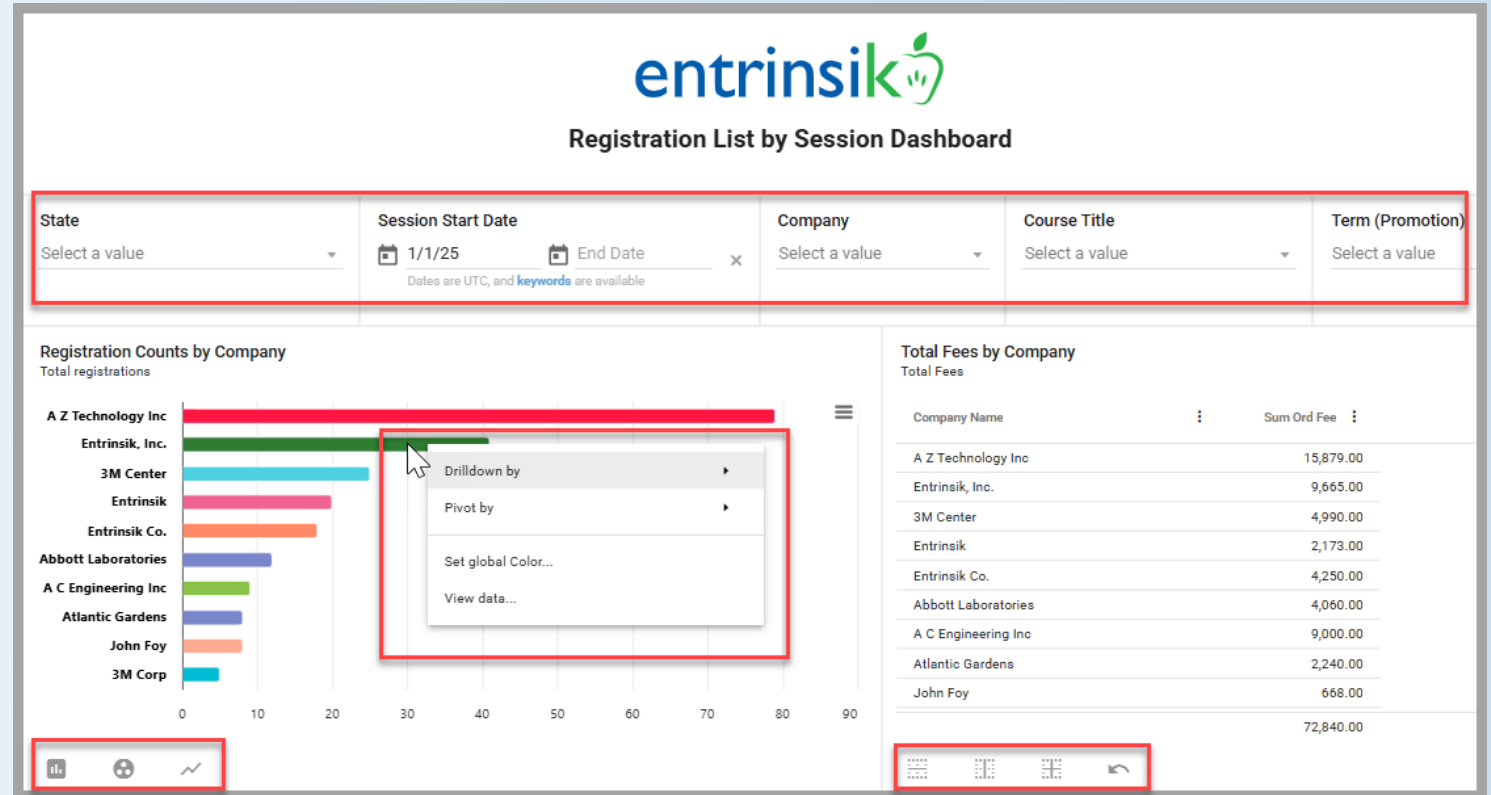
The screenshot shows the 'Registration List by Session (Enrole Training)' dashboard in edit mode. The sidebar on the left contains a 'Dashboard Editor' panel with sections for 'Layout options', 'View mode filtering', 'Datasets', and 'Elements'. The 'Elements' section lists various components like 'Company', 'Course Title', 'Embedded HTML', 'Quarterly Fees and Registratio...', 'Registration Counts by Company', 'Session Start Date', 'State', 'Term (Promotion)', 'Total Fee Goal', 'Total Fees by Company', and 'Total count by State'. The main dashboard area features the Entrinsik logo, the title 'Registrations Dashboard', and several filter cards for 'State', 'Company', 'Course Title', and 'Term (Promotion)'. A 'Session Start Date' dialog box is open, showing a date range from '2025-01-01' to 'End Date'. Below the filters is a bar chart titled 'Registration Counts by Company' showing total registrations for various companies. To the right is a table titled 'Total Fees by Company' showing total fees for each company. The top right corner has 'CANCEL' and 'SAVE' buttons. Red arrows point to the 'Session Start Date' dialog and the 'SAVE' button.

Company Name	Sum Ord Fee
A Z Technology Inc	15,879.00
Entrinsik, Inc.	9,665.00
3M Center	4,990.00
Entrinsik	2,173.00
Entrinsik Co.	4,250.00
Abbott Laboratories	4,060.00
A C Engineering Inc	9,000.00
Atlantic Gardens	2,240.00
John Foy	668.00
3M Corp	
Total	72,840.00

Dashboards User Experience: Interact

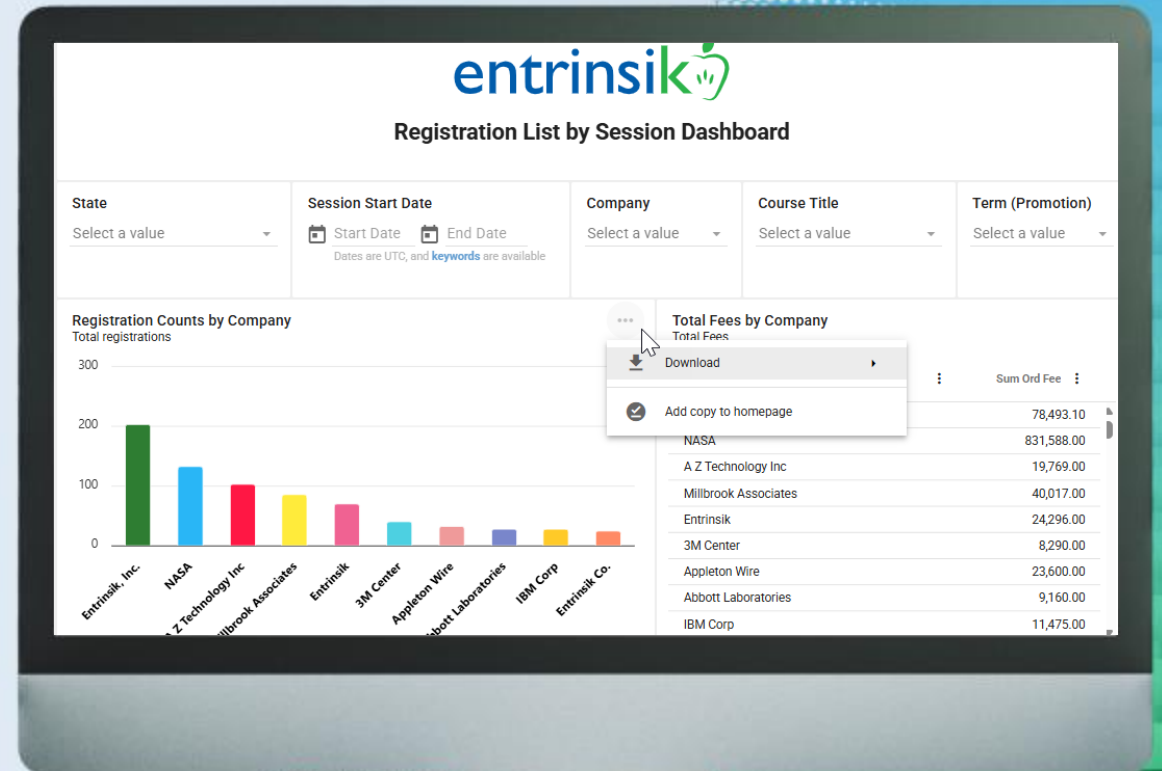


1. Filter content: Type “Dashboards.”
2. Select desired Dashboard.
3. Interact: Interact:
 - Filter
 - Scroll & hover
 - Drill down
 - Set global colors
 - View data



Dashboards User Experience: Demo

- View & run Dataset(s)
- Click “+ NEW”
- Select “Report” and “Dashboard”
- Create: Use layout designer
- Customize: Add, remove, filter, resize, move
- Interact: Filter, scroll, hover, drill down



Recap

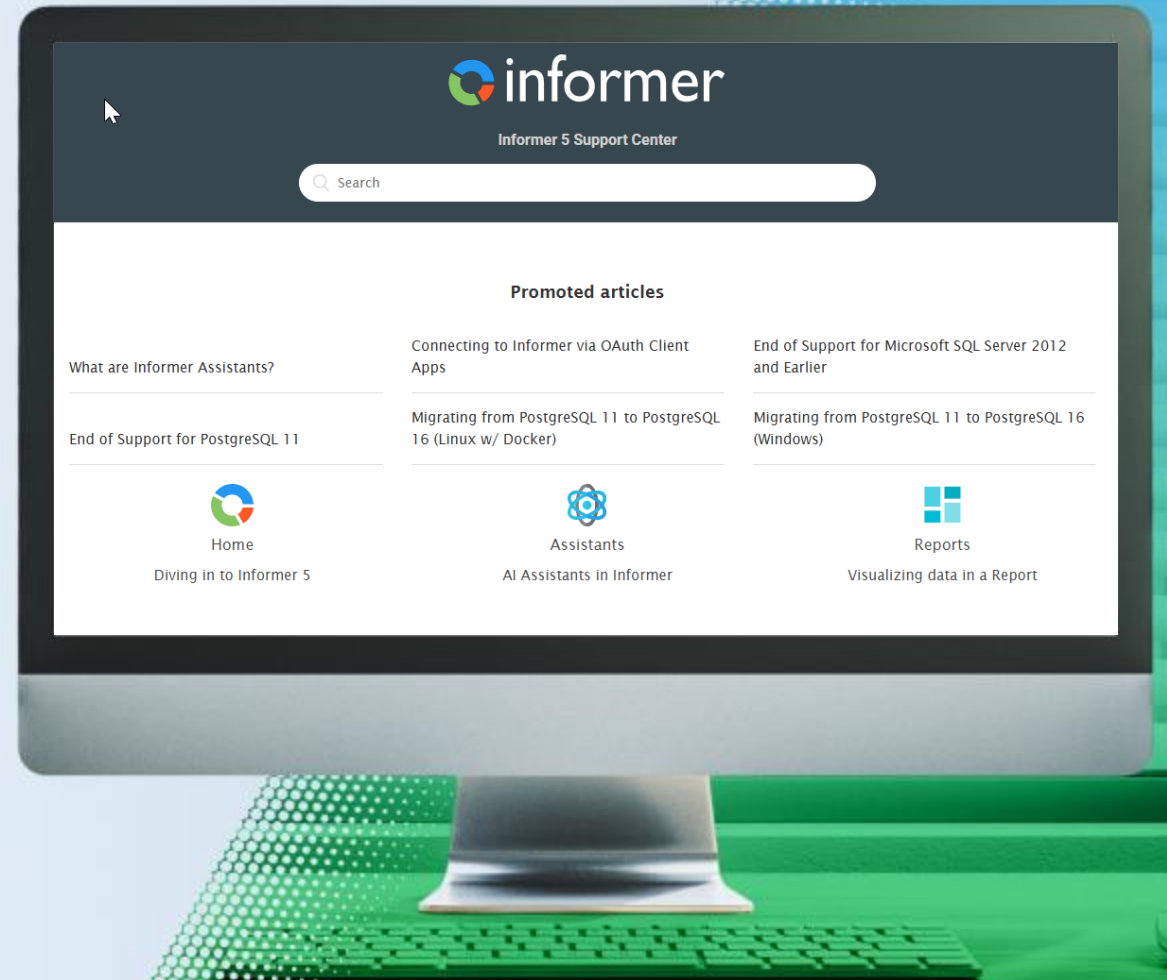
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Resources

[Informer 5 Support Center](#) articles:

- [Magic Visuals \(Beta\)](#)
- [Dashboards](#)





Thank you for joining us!

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