



INDITION DASHBOARDS

# Indition Dashboards FAQ

This FAQ answers common questions about Indition Dashboards. Your exact options depend on enabled modules, sources and permissions.



POWERED BY AI

September 2026



© 2026 Indition Corp. All rights reserved. Indition™ and the Indition logo are trademarks of Indition Corp. All other product names, logos, and brands are the property of their respective owners.

AI assistance is part of the Dashboard workflow where the site enables it. This FAQ explains how to start, what the AI controls do, how permissions affect available choices, and how to investigate results and delivery issues.



Wherever you see this mark, that feature uses Indition AI. AI can propose dashboard and widget settings or explain supported aggregate results. You review proposed settings before applying and saving them. Availability depends on the site's AI settings, provider readiness and your permissions; manual Dashboard building remains available without AI.

#### FROM A BUSINESS QUESTION TO A DASHBOARD DRAFT

### Describe what you need. Review the dashboard it builds.

**Create a whole dashboard.** In New Dashboard, describe the subject, period and questions, then choose Create with AI. The proposed board opens as an unsaved draft using sources in your permitted catalog.

**Design or revise a widget.** Describe the figure or chart you want, or request a change to an existing widget. Build it fills the ordinary editor so you can inspect the source, measure, dates and conditions.

**Explain an eligible result.** Explain this result produces supported observations from bounded aggregate evidence. It does not prove why a change happened. Inspect matching records when you need to understand the underlying work.

## Where is my dashboard

Open Dashboards / My Dashboards, or `/admin/Admin/dashboardBuilder/index/location/admin.home`. Admin Home shows it after a publisher enables that location. A role's landing-route override can still take you elsewhere.

## Why do I see an empty board

You may have no personal default or published role template. Open a ready-made dashboard, customize it and save, or ask a publisher to assign a role layout. A configured Central Records list creates starters, not automatic role publication.

## What are Central Records

They are named important API tables configured as table=label mappings. The Dashboard creates permitted starter layouts with totals, available trends and record tables. Only enabled tables you may read are included. These settings do not import data or create tables.



## Why is a table missing from Data source

---

Check whether API is enabled, the selected source connection works, the table is enabled in API Tables and your account has API Dashboard read access. Fields also need safe supported metadata. Installing a business module does not grant every staff account its source permissions.

## Why are statuses names rather than IDs

---

The relationship connects each stored key to safe label fields in an enabled related table. Choose names in a searchable multi-select; the Dashboard binds the stored keys internally. For a missing FK, a superadmin can configure API Relationships and select one or several label fields.

## How do I exclude Cancelled and Declined

---

Add Status, choose Does not equal, and select both Cancelled and Declined. Use All conditions when other restrictions must also match. Do not type the names into a numeric field or guess their IDs.

## Can I join tables or enter SQL

---

The widget uses approved provider sources and configured relationships. It does not accept SQL, arbitrary joins or executable formulas. Related address/label setup is an administrator configuration task. A new business query may need a provider change.

## What is the difference between a widget filter and a table filter

---

Widget and Dashboard conditions constrain the database result. Column filters narrow already displayed rows locally. Export This Page includes the local table filters; Export All Filtered Records uses the widget/Dashboard conditions and drill-down selection.

## What does Last 24 hours mean

---

It is a rolling window ending now. Time charts show chronological hourly buckets, including the date when crossing midnight. Boundary hours can be partial. Last month, last quarter and last year are the complete preceding calendar periods.

## Why can I not choose a map

---

Maps require one series and a source with usable geographic fields. Select a related address source and safe state fields for API records. Two unrelated series or an ordinary ZIP breakdown does not satisfy the map configuration.

## What is included in a geographic map

---

The map uses the address source and address-type conditions you chose, such as Billing or Service Location. States and ZIP regions show grouped distinct records. Configured coordinates add permitted pins and clustering. Unknown state codes or missing coordinates are handled separately.

## Why does a map count differ from the headline total

---

A record can appear in two geographic groups if it has qualifying addresses in both. Duplicate identical address rows do not duplicate pins, but totals across groups need not be one global distinct count. Check your address-type condition and missing states.

## Are addresses sent to an external provider

---

Existing coordinates need no external geocoding. Locate missing addresses performs an explicit lookup only when configured and enabled, sending up to five currently permitted addresses per click to OpenCage. Page loads do not geocode all addresses automatically.

## What can I export

---

Dashboard data tables, chart data, drill-down pages, map state totals, regions and location detail lists offer genuine XLSX. Complete record drill-downs also offer the complete filtered provider result. Actions / Download PDF captures the current board presentation.

## Why did a complete Excel export stop

---

The synchronous XLSX limit is 50,000 rows or 250,000 cells. Narrow the date range, conditions or selected record columns and try again. The result is rejected rather than silently truncated. A displayed-table export has its own request-size and snapshot limits.

## Does PDF contain every matching record

---

No. A direct PDF captures displayed widget rows and the current map view. A scheduled PDF retains configured widget row limits. Use complete filtered XLSX for underlying records within the export limits.

## Can I email or text dashboards

---

Yes, after Messaging and Dashboard notification/channel settings are configured. Save the dashboard, create a daily/weekly/monthly schedule and enter recipients. Email contains charts and a PDF. SMS contains basic statistics and an expiring direct PDF link.

## Does an SMS PDF link need a login

---

No. It is an expiring bearer link. Anyone holding it can download while it is valid and current owner/source policy checks pass. Its default lifetime is 72 hours and can be set from 1 to 168 hours. Disabling notifications disables these delivery links.

## Why does the schedule work manually but fail in cron

---

Compare the executing site root, server and module tags first. A second server running older code can behave differently. Review the native job execution log and debug file, then the schedule's per-recipient history and Messaging logs. A disabled notification switch can produce a successful skipped run.

## Does Accepted mean the email arrived

---

No. It means the transport accepted the message. Check Messaging or provider delivery logs for downstream status. A rejected recipient does not necessarily stop the other recipients. Uncertain attempts are not automatically resent.

## Can different recipients receive different results

---

Assign a saved view to each recipient. Each selected view has its own rendered PDF and link policy. These are filters within the schedule owner's permissions; they are not new permissions for that recipient.

## Why is the previous percentage unavailable

---

A missing result or zero denominator has no meaningful percentage. The source may be a current snapshot, or the widget may use an unsupported comparison/grouping or All time. Enable comparison on an eligible summary or single-series time chart with a date window.

## Who can publish or edit shared metrics

---

Publishing and sharing use the explicit dashboard\_template\_publisher capability. It is not automatically assigned to every administrator. Owners manage their personal dashboards, saved views and schedules. Shared metric changes affect other widgets that reference the metric.

## Does refreshing prove the source is current

---

Refresh time shows when the widget was evaluated. Freshness requires a configured source update field and threshold. A stale source can still answer a query successfully. Ordinary result caching may hold results for 60 seconds.

## What does AI do here

---

Configured AiCore features can assist with Dashboard/widget definitions and explain aggregate results. Aggregate explanations use bounded server facts and record links, not raw record rows for that explanation. The optional features still obey source permissions and need native provider configuration.

## How does Indition AI create a dashboard

---

Open New Dashboard and describe the subject, period, questions and useful displays. Create with AI uses your permitted catalog and returns a validated draft. Review sources, dates, measures and conditions, then save explicitly. The proposal does not enable tables, publish roles or schedule messages.

## Can AI revise a widget I already have

---

Yes, when widget assistance is enabled. Describe the desired change in the widget editor and choose Build it. The current supported configuration helps preserve unmentioned settings. Review the proposal, Apply Widget, then Save Dashboard.

## What information is sent to AI

---

Design calls send the permitted catalog and your description, not computed widget figures. Catalog labels and prompt text still carry information. Aggregate explanation sends bounded evidence, excluding individual rows, addresses and category values. Avoid private record details in a design prompt.

## Why do I have dashboard AI creation but no explanation button

---

These are separately controlled features. The site must enable the relevant capability, provide a ready AI service and grant Use AI. A display also needs suitable aggregate evidence for explanation. Ask an AI administrator to review the feature settings and limits.

## Does Explain this result tell me why performance changed

---

It presents supported observations about supplied results. It does not prove a cause. Inspect matching records, source freshness, date meanings and changed conditions before making a business conclusion.

## Where are the full workflows and visual explanations

---

The User Manual has twenty-four chapters with worked examples, sample-data screenshots and diagrams. AI creation, widget revision and result explanation have separate chapters. The Setup Guide explains native AI configuration; Technical Documentation explains information boundaries and validation.

## Does a shared template carry the publisher's data access

---

No. It supplies a layout. Each user's current source access still applies. Test representative ordinary roles before publishing. Recipient-specific scheduled views also remain within the active schedule owner's policy.

## Why is a locally filtered page different from my complete Excel export

---

A local grid filter affects materialized rows on that page. The complete provider export uses series conditions, mapped dashboard filters, dates and the drill-down selection. Put population restrictions in the widget or dashboard query to apply them to every exported record.