



INDITION DASHBOARDS

Indition Dashboards Release Notes

This product summary describes the Dashboard capabilities documented on September 2026. It is written for customers and administrators and omits internal module release identifiers. Feature availability depends on the site's enabled modules, provider configuration and current permissions.



POWERED BY AI

September 2026



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This overview covers the Dashboard product, including integrated Indition AI assistance, readable API data, operational analysis, maps, exports, templates and recurring delivery.



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.

Building and sharing dashboards

Personal dashboards, role templates and ready-made starting layouts support different audiences. Five display types combine summaries, charts, record tables, activity lists and explanatory notes. Source selection precedes display selection, editor sections collapse independently and Live preview starts closed.

Publishers can assign role defaults, decide whether personal customization is allowed, review publication history and restore a template as a new published version. Import and export transfer definitions for review. Supported central administration can deliver compatible drafts to destination instances without publishing them automatically.

API data and readable business fields

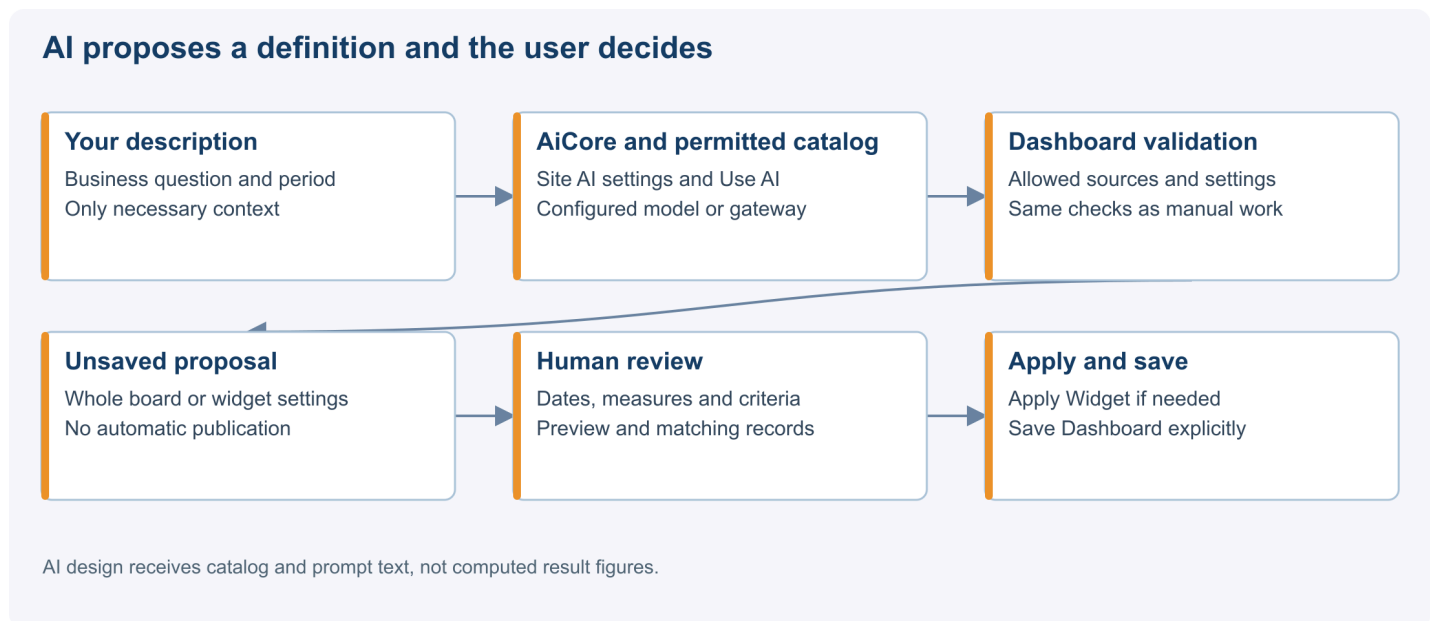
API providers use enabled tables from the configured data connection and enforce read permissions and masking. Central Records supplies subject-named starter boards. Relationships fill missing foreign-key metadata and support compound readable labels. Business field metadata supplies labels, number formats, geographic roles and optional source freshness.



Conditions support typed comparisons, readable relationship multi-selects and nested All or Any groups. Shared filters map explicitly to compatible sources. Saved views retain useful periods and filters, while reusable metrics centralize a source, measure and conditions.

Indition AI integration

AiCore supplies whole-dashboard creation, widget design and revision, and aggregate result explanation. Design requests use the permitted catalog and the user's description. Settings are validated and opened as unsaved proposals. Explanation selects observations from bounded server-generated evidence and does not invent causes.



AI design validation and review

Native AI Settings controls individual Dashboard features, provider readiness, model selection and limits. Use AI permission is required. Manual Dashboard workflows continue to work without AI.

Operational analysis and geography

Calculated summary KPIs support sums, differences, ratios, percentages and positive targets. Aging and overdue sources support operational work lists. Workflow funnels compare stage counts. Current and previous periods and Last 24 hours provide appropriate comparisons and chronological hourly analysis where the source supports them.

Geographic maps use related address sources, geographic field roles and address-specific criteria. State selection zooms to detail, with ZIP regions, available coordinate pins, clustering, loaded-record search and matching records. Optional missing-address lookup is explicit and separately configured.

Exports and recurring reports

XLSX export covers Dashboard tables, chart data, drill-down records, state and region lists and location detail. Displayed export preserves local presentation. Complete filtered record export uses the permitted provider query and documented bounds. Technical IDs and UUIDs stay hidden and readable labels carry into the workbook.

Actions / Download PDF captures the current board presentation, including charts and map zoom. Spaces in the dashboard name become hyphens and a millisecond timestamp gives each filename a distinct value.

Scheduled email includes rendered results and PDF. SMS carries basic statistics and an expiring direct PDF link. Daily, weekly and monthly schedules support timezones, saved views, recipient variants and supported conditional alerts. Native history and transport logs record outcomes; transport acceptance is distinct from recipient receipt.

Documentation and rollout

The User Manual contains twenty-four chapters with task walkthroughs, sample-data screenshots and module-interaction diagrams. Separate AI chapters explain creation, widget revision and result observations. The Setup Guide covers native configuration and acceptance. Technical Documentation explains providers, information boundaries and policy enforcement.

Apply the site's approved module installation or upgrade process before enabling optional services. Validate ordinary role access, exports, map behavior, AI provider operation and scheduled transport on the target instance. The documentation is an operating reference rather than a guarantee of identical provider availability across every installation.