

Version 25



Trapeze

Enterprise Asset Management

Dashboard

Administrator Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Dashboard - Administrator Guide

Version 25.x

February 2025

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1. Overview

The Dashboard Module provides snap-in dashboard functionality to your existing system. It provides real-time access to your database through easy-to-interpret, out-of-the-box gauges and charts. Dashboard elements provide instant insight into your maintenance key performance indicators via a standard web browser. You may provide access to dashboards to anyone in your organization, without the need to install any software on their machines.

The Dashboard Module is a .NET-powered add-on to the family of products. Customers use the Dashboard Module to add dashboard content to their maintenance management portal for viewers both inside and outside of the maintenance organization. Dashboards may be implemented on pages all by themselves or integrated into existing pages, such as the Supervisor Portal (included in the Shop Activity Module).

Requirements

Application 25.x

Web Modules 25.x

Assumptions

- Familiarity with workflow and configuration.
- Familiarity with SQL Select statements.
- ❗ User defined required fields that do not appear in Web Modules will return validation messages
- ❗ Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
- ❗ Do not open or use the same instance of the Web Modules in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

Install the Dashboard Module

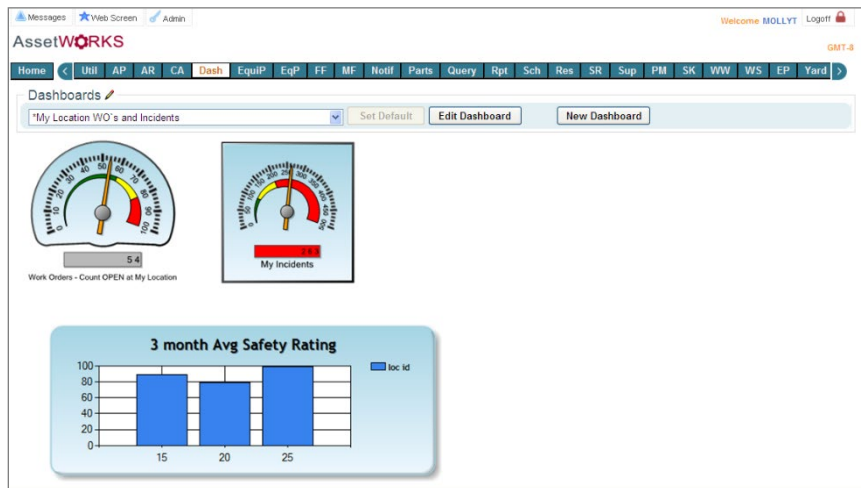
Please refer to the Administrator Guide – Install/Upgrade Steps and Web Modules Configuration, Adding Modules and Tabs sections for instructions on installing and upgrading Web Modules.

2. Add a Dashboard Tab to Web Modules

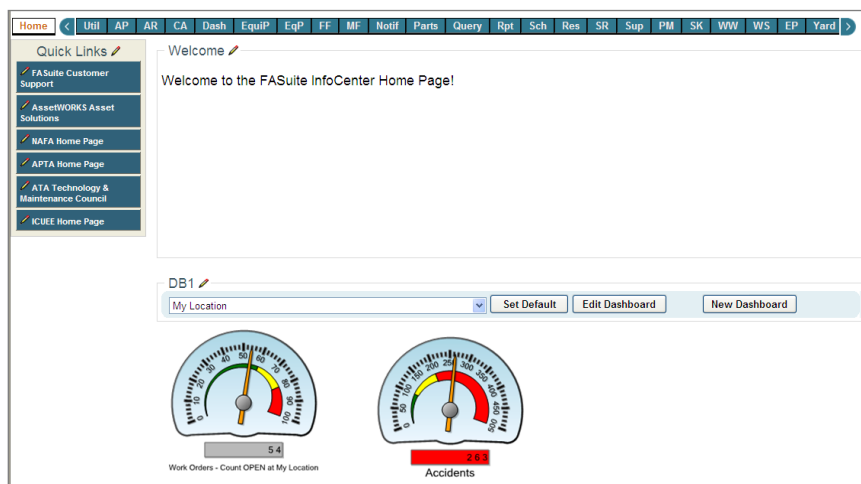
Once you have installed the Dashboard Module, you need to add a tab to the Web Modules. First, you need to determine how best to make the functions of the Dashboard Module available to your users.

The Dashboard elements may be accessed in a variety of ways including:

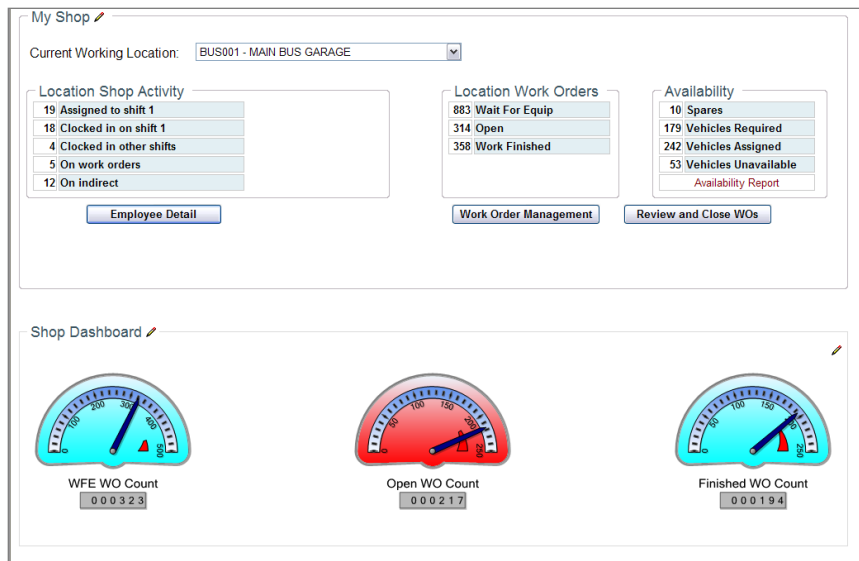
- Creating a Dashboard tab to display key performance information.



- Adding Dashboard elements to the Web Modules Home Page for immediate view upon logging into Web Modules.



- Integrating the Dashboard Module with other Web Modules to display key performance information.

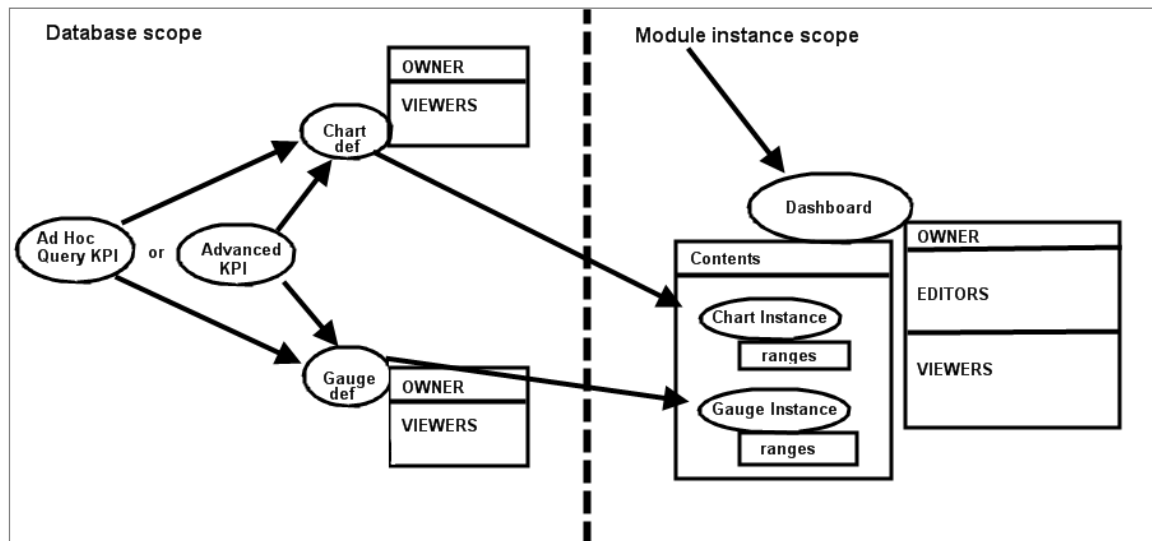


Please refer to the *Administrator Guide, Web Modules Configuration – Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs. The [Set User Group Permissions](#) section below outlines granting rights to users so they may view or edit gauges, charts and dashboards. Please also refer to the [Gauges Group Rights](#) and [Charts Group Rights](#) sections as well as the [Share a Dashboard](#) section below for additional clarification about owning and sharing dashboards and their elements with users and user groups.

3. Dashboard Module Components Overview

The Dashboard module contains components that provide information about the organization. A dashboard is a collection of customizable gauges and charts which are driven by key performance indicators (KPIs). Dashboards are specific to the module instance. Whereas gauges, charts, and KPIs are database-wide and can cross the module instance boundaries.

The diagram below provides an overview of the scope of dashboard objects, the concept of gauge/chart definition versus instance, and where permissions apply at different levels. The directional arrows represent the order in which objects should be created.



Although additional information is provided later in this guide, the following sections provide a brief overview of the Dashboard Module components and how each component works in relation to the others.

Dashboards

Following is important information to better understand dashboards and dashboard ownership:

- Dashboards are created within a module by a user (owner) with permission to create dashboards.
- Dashboard ownership cannot be transferred.
- Dashboards are limited by module instance boundaries. In other words, each module can have multiple dashboards and dashboards created within a given module instance can only be accessed from that module instance.
- The dashboard owner can share view/edit permissions with other users of that module.

Sample Dashboards module depicting one of the dashboards available in the drop-down list:



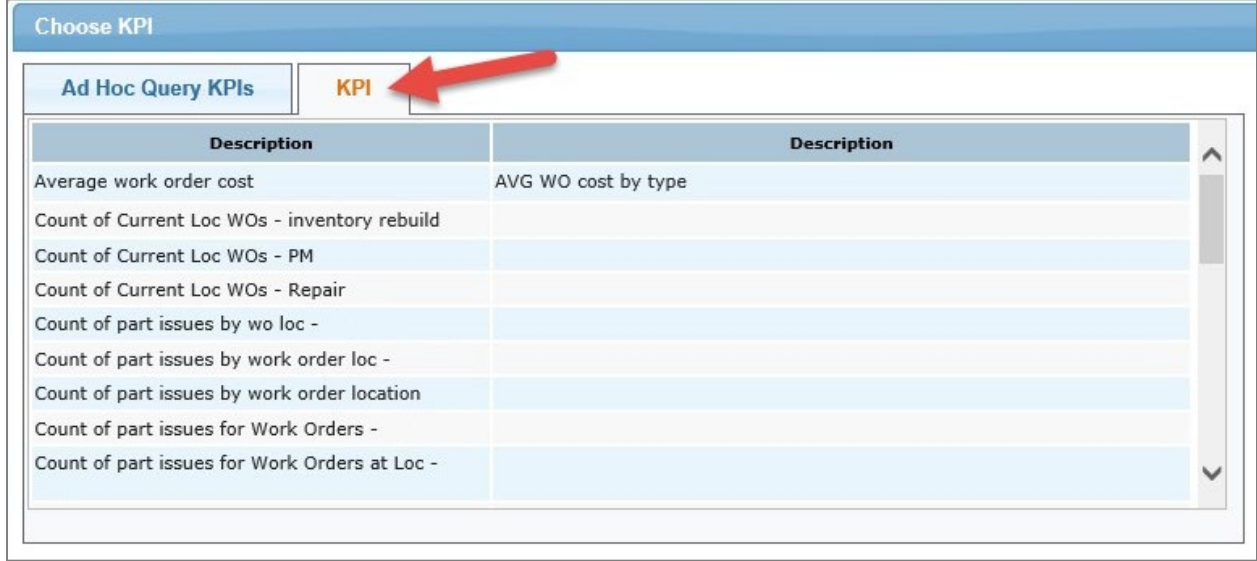
Key Performance Indicators (KPIs)

KPIs are data values that your organization can use to measure performance. You can create KPIs either from Ad Hoc Query Reports, or by manually writing SQL (Advanced KPIs). KPIs drive the dashboard elements and provide the link between the gauge or chart and the database. All KPIs must result in at least one numeric return (i.e., total dollar amount, percentage, etc.).

The following information is important to better understand KPIs:

- KPIs are universal to the database (independent of the modules).
- KPIs do not have permissions or owners associated with them.
- There are two types of KPIs: Advanced KPIs and Ad Hoc Query KPIs.
- Only administrators can create Advanced KPIs.
- Any Dashboard administrator can edit any Advanced KPI.
- Once defined, any user who can create/edit gauges/charts can use any KPI in the system.

Sample Ad Hoc Query KPIs and KPI tab:



Choose KPI

Ad Hoc Query KPIs KPI

Description	Description
Average work order cost	AVG WO cost by type
Count of Current Loc WOs - inventory rebuild	
Count of Current Loc WOs - PM	
Count of Current Loc WOs - Repair	
Count of part issues by wo loc -	
Count of part issues by work order loc -	
Count of part issues by work order location	
Count of part issues for Work Orders -	
Count of part issues for Work Orders at Loc -	

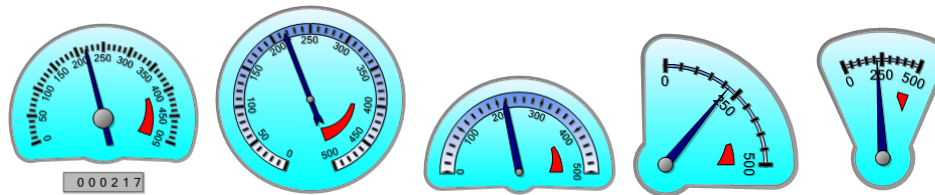
Gauges

A gauge is a visual representation of KPI data resulting from a SQL Select statement that returns a **single** value. As such, gauges are powered by Ad Hoc Query reports that return a single row and column.

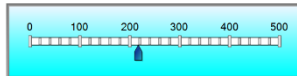
Following is important information to better understand gauges and gauge ownership:

- Gauges are created by a user (owner) with permission to create gauges.
- Gauge ownership cannot be transferred.
- Gauges are defined independent of the module. They are universal to the database. (The module instance they are created or used in does not matter.)
- Only the gauge's owner has permission to edit the gauge definition.
- The gauge's owner can always edit his gauges and add them to any dashboards that he owns or has permissions to edit.
- The gauge's owner can also choose to allow other users to add his gauges to dashboards via Assigned Groups. For more information about Assigned Groups, please refer to the [Group Rights](#) section below.

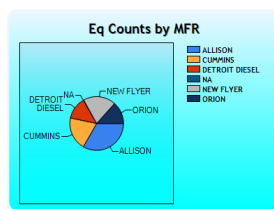
Sample out-of-the-box Single-Dial Speedometer Gauges:



Sample out-of-the-box Single-Value Linear Gauges:



Sample out-of-the-box Pie Chart:



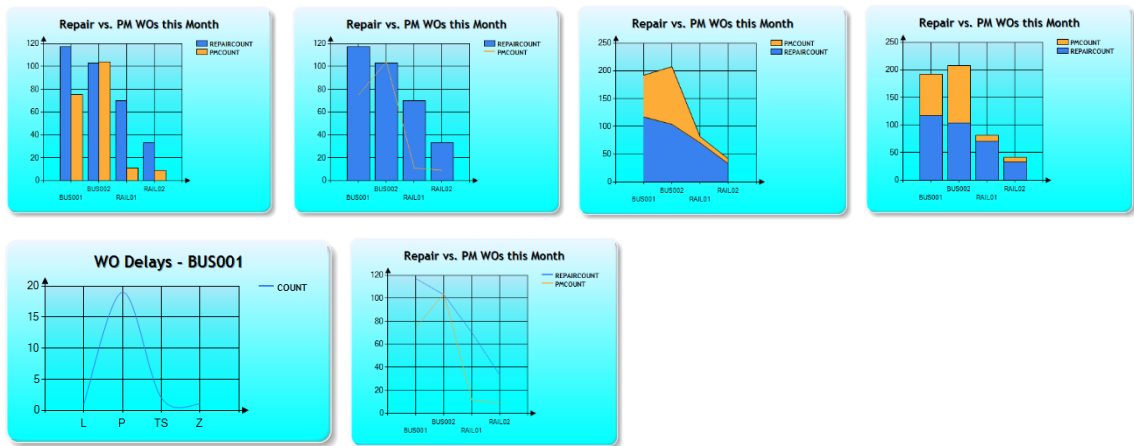
Charts

A chart or graph is a visual representation of KPI data resulting from a SQL Select statement which returns **multiple** values. The SQL Select statement provides the values for the x and y axis. As such, charts are powered by Ad Hoc Query reports that return multiple rows and columns.

The following is important information to better understand charts and chart ownership:

- Charts are created by a user (owner) with permission to create charts.
- Chart ownership cannot be transferred.
- Charts are defined independent of the module. They are universal to the database. (It does not matter what module instance they are created or used in.)
- Only the chart's owner has permission to edit the chart definition.
- The chart's owner can always edit his charts and add them to any dashboards that he owns or has permissions to edit.
- The chart's owner can also choose to allow other users to add his charts to dashboards via Assigned Groups. For more information about Assigned Groups, please refer to the [Group Rights](#) section below.

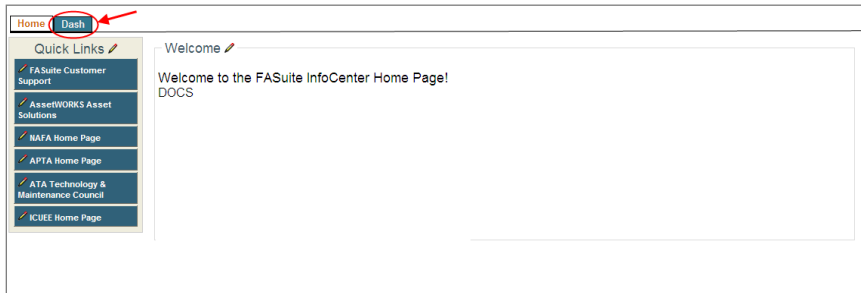
Sample out-of-the-box Charts:



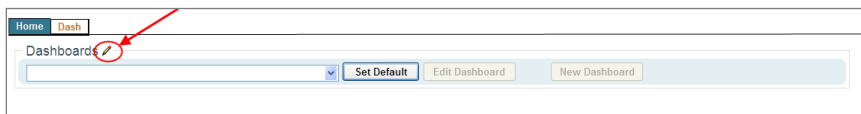
4. Configure Dashboard Module

This section outlines how to define user rights and how to configure the Dashboard Module elements and layout.

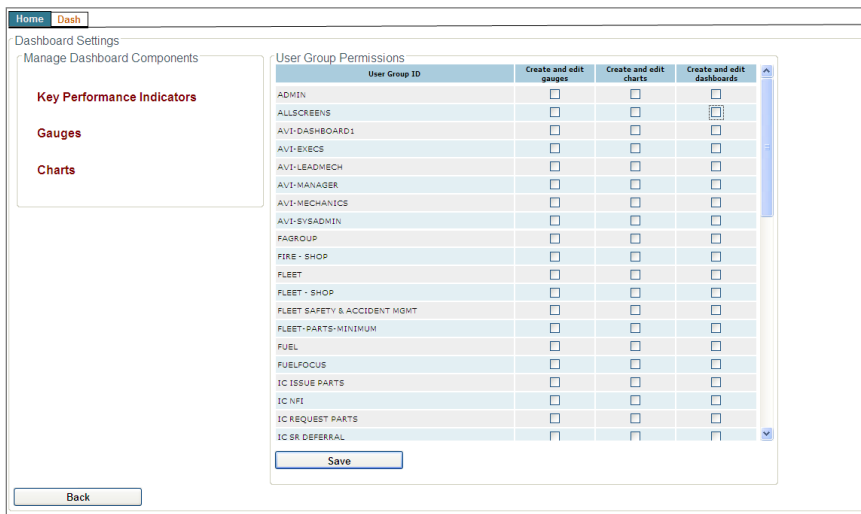
1. While logged into Web Modules as an Administrator, click on the tab for the Dashboard Module.



2. Click the pencil icon next to the module title bar to edit the Dashboard settings.



The Dashboard Settings page displays. This page is where the dashboard components and user group permissions are defined.



Set User Group Permissions

It is necessary to determine who will have the rights to create and edit the gauges, charts, and dashboards. It is likely that some of the basic charts or gauges will be shared by multiple modules and user groups. However, dashboards are often specific to the user's workflow and tab.

Charts and gauges that have been created are only modifiable by the user that created them. If a chart or gauge is available for use by multiple people or groups (as set in the Group Rights section on the editor page of that item), that item can be added to a dashboard, or modified and saved as a new copy if a user needs to change it for their own use.

Two scenarios are provided to show how user group permissions may be set.

Scenario One

- The Supervisor tab may contain the Shop Activity Supervisor module and Dashboards module, but the dashboards are configured so only high-level supervisors can create them and contain only gauges that make sense to shop supervisors. Likewise, a Storekeeper tab may have the Storekeeper module and Dashboards module, but would have gauges that only make sense to storekeepers. A Pending Part Requests gauge may be placed on both the supervisor and the storekeeper dashboards. Within each dashboard, the Pending Part Requests gauge may have different ranges (for example, supervisors may need to know if the number goes higher than 100, but storekeepers may need to know if the number goes higher than 10).

Scenario Two

- A user could have access to two different dashboard instances (one on the Home tab and one on the Technician tab), but may only have permission to create or edit dashboards on the Technician tab if the Home tab was created for general information available to all employees and only the system administrator has permission to edit it.

User Group Permissions Settings

The User Groups Permissions section controls what users can access gauges and charts within the portal. As an administrator, you can access the **Key Performance Indicators** (KPIs), **Gauges**, and **Charts** buttons on the Dashboard Settings page as long as you have permission set up in the User Group Permissions section for the specific module instance that you are in.

Dashboard Settings

Manage Dashboard Components

Key Performance Indicators

Gauges

Charts

User Group Permissions

User Group ID	Create and edit gauges	Create and edit charts	Create and edit dashboards
ALLOCATION AND ASSIGNMENT OPS	☐	☐	☐
ALLOCATION ASSIGNMENT ADMIN	☐	☐	☐
AUTOMATION	☐	☐	☐
COMPONENTS	☐	☐	☐
CONTROLLER - BUS	☐	☐	☐
CONTROLLER - RAIL	☐	☐	☐
CORE IMPLEMENTATION GROUP	☐	☐	☐
DIRECTOR/ASST GEN MGR	☐	☐	☐
ENGINEERING	☐	☐	☐
GEN SUPR/MGR	☐	☐	☐

Back Save

To set user group permissions:

1. Check the boxes to determine the User Groups that may create and edit gauges, charts, and dashboards, and click the **Save** button to save the settings.

Dashboard Settings

Manage Dashboard Components

Key Performance Indicators

Gauges

Charts

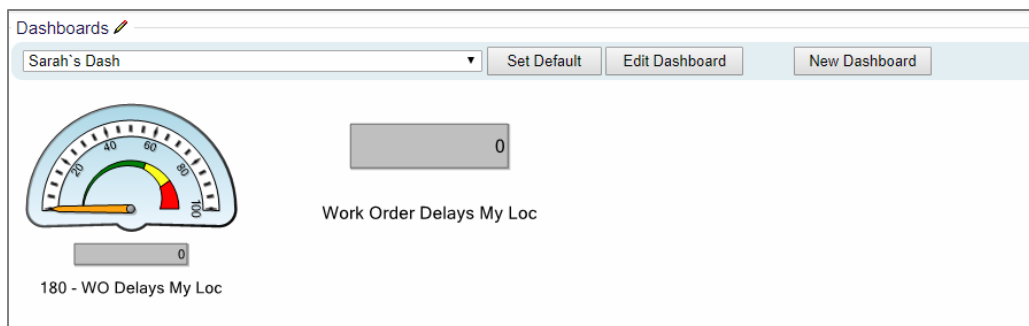
User Group Permissions

User Group ID	Create and edit gauges	Create and edit charts	Create and edit dashboards
ALLOCATION AND ASSIGNMENT OPS	☐	☐	☐
ALLOCATION ASSIGNMENT ADMIN	☐	☐	☐
AUTOMATION	☐	☐	☐
COMPONENTS	☐	☐	☐
CONTROLLER - BUS	☐	☐	☐
CONTROLLER - RAIL	☐	☐	☐
CORE IMPLEMENTATION GROUP	☐	☐	☐
DIRECTOR/ASST GEN MGR	☐	☐	☐
ENGINEERING	☐	☐	☐
GEN SUPR/MGR	☐	☐	☐

Back Save

Successful Update message displays.

2. Once permission has been granted, the **New Dashboard** and **Edit Dashboard** buttons display on the Dashboard Main page.



- Continue setting the KPIs, gauges, and charts definitions by clicking on the respective links on the left side of the page. See the [Define Key Performance Indicators \(KPIs\)](#), [Gauges](#), and [Charts](#) sections below for information on completing the Dashboard configuration.

Define Key Performance Indicators (KPIs)

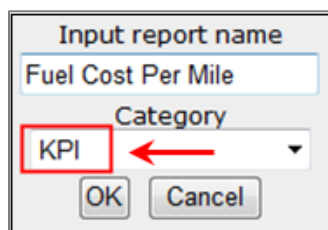
KPIs are SQL Select statements that drive the dashboard elements and provide the link between the gauge or chart and the database. KPIs also result in one or more numeric return, such as total dollar amount, percentage, etc.

There are two ways to provide a dashboard, gauge, or chart with its data: Ad Hoc Query KPIs and Advanced KPIs. The method most commonly used to construct KPIs is through the Ad Hoc Query Module. Reports are created in the Ad Hoc Query Module and must be saved with a category of KPI (all CAPS). Basically, the Ad Hoc Query report drives the dashboard elements. Please refer to the *Ad Hoc Query Administrator and User Guides* for more information about creating reports in the Ad Hoc Query module. The other method is to define Advanced Key Performance Indicators via the Dashboard Settings page.

✓ Tip: User interface (UI) controls may be used to hide or disable the KPI link from the Dashboard Settings page.

📅 Note: If you have access to two different Dashboard module instances, one for which you are an Admin, and one for which you are not an Admin, you can only create and edit KPIs through the module instance for which you are an Admin.

➡ To define Ad Hoc Query KPIs, create a report in Ad Hoc Query module and be sure to save it with a category of **KPI**



To define Advanced KPIs:

1. Click the **Key Performance Indicators** link in the Manage Dashboard Components section of the Dashboard Settings page.

Dashboard Settings

Manage Dashboard Components

Key Performance Indicators

Gauges

Charts

Back

User Group Permissions

User Group ID	Create and edit gauges	Create and edit charts	Create and edit dashboards
ADMIN	☐	☐	☐
ALLSCREENS	☒	☒	☒
AVI-DASHBOARD1	☐	☐	☐
AVI-EVECS	☐	☐	☐
AVI-LEADMECH	☐	☐	☐
AVI-MANAGER	☐	☐	☐
AVI-MECHANICS	☐	☐	☐
AVI-SYSADMIN	☐	☐	☐
FAGROUP	☐	☐	☐
FIRE - SHOP	☐	☐	☐
FLEET	☐	☐	☐
FLEET - SHOP	☐	☐	☐
FLEET SAFETY & ACCIDENT MGMT	☐	☐	☐
FLEET-PARTS-MINIMUM	☐	☐	☐
FUEL	☐	☐	☐
FUELPFCUS	☐	☐	☐
IC ISSUE PARTS	☐	☐	☐
IC NFI	☐	☐	☐
IC REQUEST PARTS	☐	☐	☐
IC SR DEFERRAL	☐	☐	☐

Save

The KPI Definition page displays.

KPI Definition

Add A Query:

Refresh

Save

Back

Delete

Query Name

Description

SQL Statement:

Keywords

Insert Keyword

Query Results

The Dashboard Module includes several out-of-the-box queries and allows you to create customized queries based on your organization's requirements. The KPI Definition page is where you create and edit the SQL queries that feed the dashboard gauge and chart elements.

2. To edit an existing query or use an existing query as a template, select a query from the drop-down selection box.

KPI Definition

Add A Query:

Refresh

Save

Back

Delete

Query Name

Description

SQL Statement:

Keywords

Insert Keyword

Query Results

The remaining fields are populated based on your selection and may be edited as desired.

KPI Definition

Add A Query:

Work Orders OPEN at LOC

Work Orders OPEN at LOC Query Name

Description

Number of Open Work Orders restricted by users location id

SQL Statement:

```
SELECT COUNT(*) as Count FROM EMSDBA.JOB_MAIN WHERE LOC_work_order_loc = '(FAVAR_UsersSessionLoc)'
AND work_order_status = 'OPEN'
```

Keywords

Query Results

count
54

- To create a new query, enter a name for the query in the **Query Name** field. The **Query Name** is how the new KPI will be displayed in the drop-down lists.
- Enter a query description in the **Description** box. The description is a detailed description of the KPI's function.
- Type a SQL Select statement in the **SQL Statement** entry box. The **SQL Statement** is the communication that results in the data display for the Dashboard element.

 There are differences in SQL Select Statements based on whether you are using an Oracle or SQL database. Be sure to use the appropriate SQL Statement for your database.

KPI Definition

Add A Query:

Work Orders OPEN at LOC

example query Query Name 2

Description

Number of Open Work Orders restricted by users location id at beginning of year and now 3

SQL Statement:

```
SELECT COUNT(*) as Count FROM EMSDBA.JOB_MAIN WHERE LOC_work_order_loc = '(FAVAR_UsersSessionLoc)'
AND work_order_status = 'OPEN' 4
```

Keywords

Query Results

count
54

- To enter out-of-the-box keywords in the SQL statement, select the desired **Keyword** from the drop-down selection box.

Keywords

Query Results

Users Location ID

Users Employee ID

Users Operator ID

Users Vendor ID

Users Operators Department

Now

Today

This Week Start

This Month Start

This Quarter Start

This Year Start

Insert Keyword

Keywords, Keyword Codes, and Descriptions are provided in the following table.

Keyword	Keyword Code	Description
User's Location ID	{FAVAR_UsersSessionLoc}	The logged-in user's Session Location ID, as defined on the Users screen.
User's Employee ID	{FAVAR_UsersEmployeeID}	The logged-in user's Associated Employee ID, as defined on the Users screen.
User's Operator ID	{FAVAR_UsersOperatorID}	The logged-in user's Associated Operator ID, as defined on the Users screen.
User's Vendor ID	{FAVAR_UsersVendorID}	The logged-in user's Associated Vendor ID, as defined on the Users screen.
User's Operator's Department	{FAVAR_UsersOperatorsDept}	The Department ID of the logged-in user's Associated Operator ID.
Now	{FAVAR_Now}	Current datetime (at the time the dashboard is viewed)
Today	{FAVAR_TodayStart}	Today's date, with a time of midnight.
This Week Start	{FAVAR_WeekStart}	The date of the previous Sunday, at midnight.
This Month Start	{FAVAR_MonthStart}	The date of the first of the current month, at midnight.
This Quarter Start	{FAVAR_QuarterStart}	The date of the first of the current quarter, at midnight.
This Year Start	{FAVAR_YearStart}	January 1st of the current year, at midnight.
Shop Activity Supervisor Portal Current Working Location	{WEBVAR_CurrentLoc}	The current working location as specified in the Supervisor Portal.
Shop Activity Storekeeper Portal Current Working Location	{WEBVAR_CurrentPartsLoc}	The current working location as specified in the Storekeeper Portal.

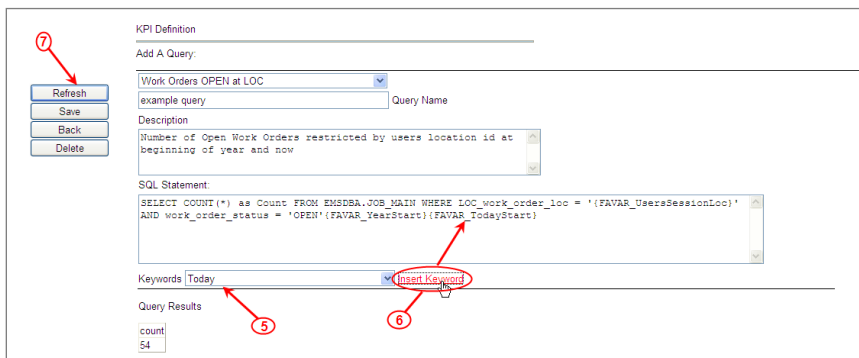


The user specific keywords provide a snapshot based on the user information and change based upon the user. Non-user specific keywords are displayed the same regardless of the user ID. The information displayed is the same for all users.

- Click the **Insert Keyword** link to insert the keyword into the SQL Statement.
- The keyword is inserted in the SQL Statement box.

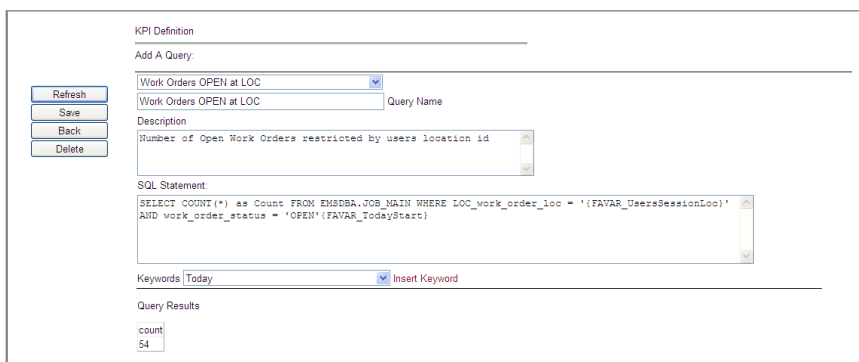
 The keyword is added to the end of the statement. To add it to a different location, simply cut and paste it in the right location.

- Click the **Refresh** button to display the **Query Results** without saving them.



The screenshot shows the 'KPI Definition' form. On the left, there are buttons: Refresh (circled with a red 7), Save, Back, and Delete. The 'Add A Query' section contains a dropdown menu with 'Work Orders OPEN at LOC' selected, a text field with 'example query', and a 'Query Name' field. The 'Description' field contains 'Number of Open Work Orders restricted by users location id at beginning of year and now'. The 'SQL Statement' field contains a complex SQL query. Below the SQL statement, there is a 'Keywords' dropdown with 'Today' selected and an 'Insert Keyword' button (circled with a red 6). At the bottom, the 'Query Results' section shows a table with one row: 'count' and '54' (circled with a red 5).

The query result is displayed in the Query Results section at the bottom of the page. See the example screenshot below for a sample query.



This screenshot shows the same 'KPI Definition' form, but with the 'Refresh' button disabled. The 'SQL Statement' field contains a different query: 'SELECT COUNT(*) as Count FROM ENSDBA.JOB_MAIN WHERE LOC_work_order_loc = ''(FAVAR_UsersSessionLoc)'' AND work_order_status = ''OPEN''(FAVAR_TodayStart)'. The 'Query Results' section shows the same table with 'count' and '54'.

- Click the **Save** button to save your query.
- Click the **Delete** button to delete your query.

 **Note:** Upon trying to delete a KPI which is being used by a dashboard element in the Dashboard module, a Validation message will indicate that it cannot be deleted.

- Click the **Back** button to go back to the Dashboard Settings Page and begin defining your gauges and/or charts.

Gauges

As mentioned above, gauges are driven by KPIs that result in a single value. The Gauge Settings page is where you create gauges to add to a dashboard.

➡ To define a gauge, click the **Gauges** link on the Dashboard Settings page.

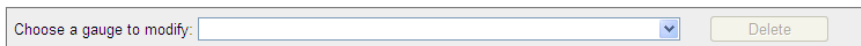
The screenshot shows the 'Dashboard Settings' page. On the left, under 'Manage Dashboard Components', the 'Key Performance Indicators' section has a red circle around the 'Gauges' link, with a red arrow pointing to it. The 'Charts' link is also visible below it. On the right, the 'User Group Permissions' table is shown with columns for 'User Group ID', 'Create and edit gauges', 'Create and edit charts', and 'Create and edit dashboards'. The table lists various user groups like ADMIN, ALLSCREENS, AVI-DASHBOARD1, etc., with checkboxes for permissions. A 'Save' button is at the bottom right of the table, and a 'Back' button is at the bottom left of the page.

The Gauge Editor page displays.

The screenshot shows the 'Gauge Editor' page. At the top, there's a 'Choose a gauge to modify' dropdown and a 'Delete' button. Below this is the 'Gauge Definition' section with fields for 'Name', 'Description', 'Tooltip Text', 'Label Text', 'Drill Down URL', and 'Web Screen Link'. The 'Type' is set to 'Speedometer'. A 'Preview' section shows a visual representation of the gauge. Below the preview are 'Colors' and 'Style' sections. The 'Colors' section includes options for Border Top, Border Bottom, Top, Bottom, Text, Acceptable Range, Warning Range, Alert Range, Needle, Tick & Number, Background, and Text Background. The 'Style' section includes options for Frame style, Frame shape, Frame width, Show Glass, Canvas Size (Width, Height), Scale and Precision (Scale, Decimal places), and Ranges (Start, End, Acceptable Range Start, Warning Range Start, Alert Range Start, Alert Range End). At the bottom, there's a 'Group Rights' section with 'Available Groups' and 'Assigned Groups' lists.

Create a Gauge

➡ To edit an existing gauge or use an existing gauge as a template, select the name of the gauge from the drop-down selection box.



Choose a gauge to modify: ▼ Delete

The fields are populated based on your selection and you may edit them as desired. Click Save to save your changes.

If a gauge does not exist, you may create a new gauge by completing the fields as indicated in the sections below.

Gauge Definition Settings



Gauge Definition

KPI: Choose KPI

Name: Type: Speedometer ▼

Description:

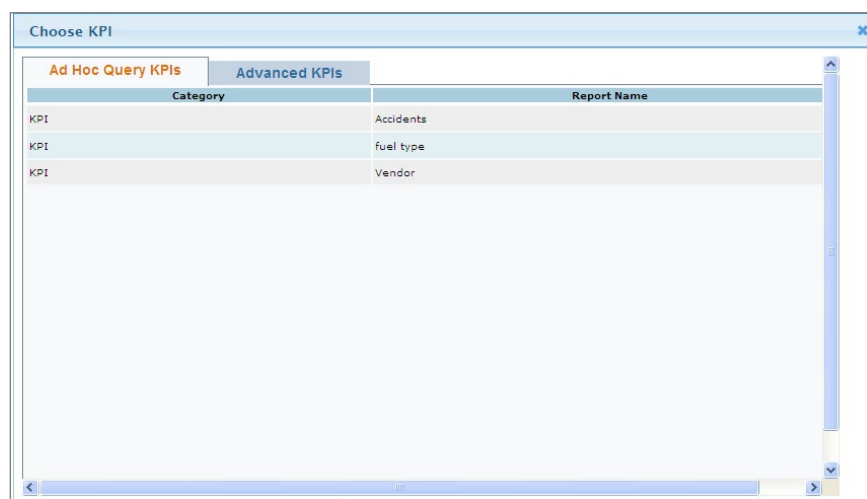
Tooltip Text:

Label Text:

Drill Down URL: ☒ Open in new window

Web Screen Link

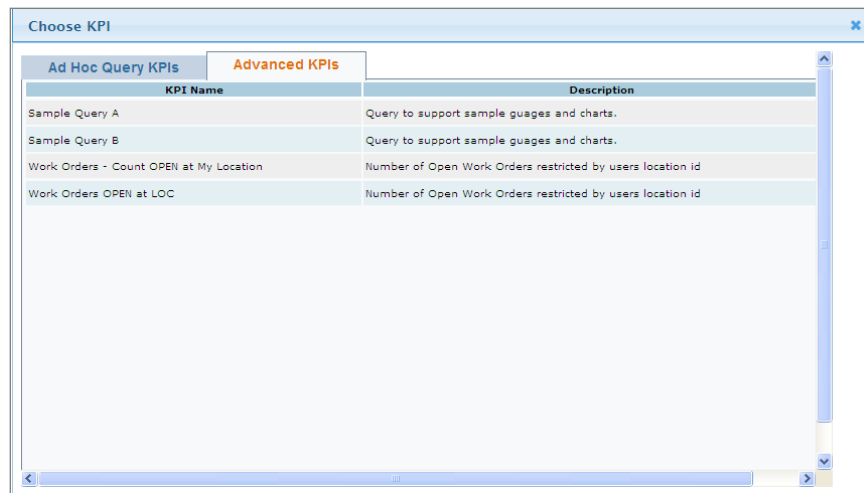
- Complete the main gauge definition settings based on the following information:
 - Choose KPI:** The KPI (query) used to drive this gauge. (Gauges expect KPI definitions that only return a single row. The first column of the KPI is the numeric value that drives the needle.) Click the **Choose KPI** button and select the desired KPI from the Ad Hoc Query KPIs or Advanced KPIs tabs on the **Choose KPI** pop-in.



Choose KPI

Ad Hoc Query KPIs Advanced KPIs

Category	Report Name
KPI	Accidents
KPI	Fuel type
KPI	Vendor



- **Name:** The name of the gauge.
- **Type:** The gauge style (dial, speedometer, linear, thermometer, numeric, 180, 90, and 45).
- **Description:** A description of the gauge.
- **Tooltip Text:** Text that displays when the user hovers the cursor over the gauge.
- **Label Text:** The label that appears at the bottom of the gauge.
- **Drill Down URL:** A URL that is linked to the gauge. The field may also be used to link the gauge with a report. Or, you may create custom reports that mimic the SQL queries that drive the gauge.
- ✔ Please refer to the Administrator Guide - Appendix A.3 Using Reporting Module URLs in Dashboards Module and the Reporting Module User Guide for more information about reports.
- **Open New Window:** Checking this box indicates that the drilldown URL will open in a new Internet Explorer window (and the report would display in the new window).
- **Web Screen Link:** Click the **Web Screen Link** button to link the gauge to a Web Screen. The **Web Screen Link** fields display:

Web Screen Link

Screen ID

Optional Filters:

• Window ID Control ID Value

2. Complete the **Screen ID** and **Optional Filter** fields. Field information for Enterprise Portal screens is located by enabling User Interface (UI) Controls. **Right-click** on the

logo at the top of the page and select **Show UI Ctrl Info**. Please refer to the *Administrator Guide* for more details.

- Click the **Build Link URL** button to create the link.

*The **Drill Down URL** field is populated with the Web Screen Link information.*

Gauge Definition

KPI: **Choose KPI** Work Orders - Count OPEN at My Location

Name: My OPEN Work Orders Type: Speedometer

Description: Open Work Orders at my Location

Tooltip Text: Open WOs

Label Text: Work Orders - Count OPEN at My Location

Drill Down URL: top.cash.openEPIWindow('2037','2037','189-9={FAVAR_USERSSESSIONLOC}) ☒ Open in new window

Web Screen Link

Screen ID: 2037

Optional Filters:

- Window ID: 189 Control ID: 9 Value: {FAVAR_USERSSESSIONLOC}
- Window ID: Control ID: Value:

Available variables from KPI - copy and paste into Value field (including the {}s):
{FAVAR_UsersSessionLoc}

Build Link URL

- Click the **Save** button to save your changes.

Preview

The **Preview** area provides a preview of how the gauge will display based on the current definition, colors, style, etc. As you make changes on this page, the **Refresh** button highlights yellow.

- Click the **Refresh** button to see how your changes affect the gauge in the **Preview** area.
- Continue adjusting the settings and clicking the **Refresh** button until the desired look displays in the **Preview** area.

Preview

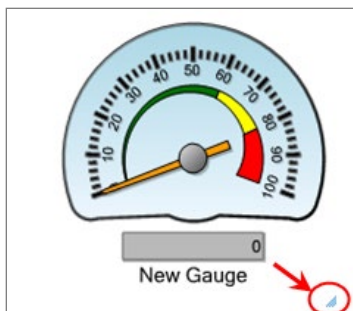
Refresh **Save** **Back**

Work Orders - Count OPEN at My Location

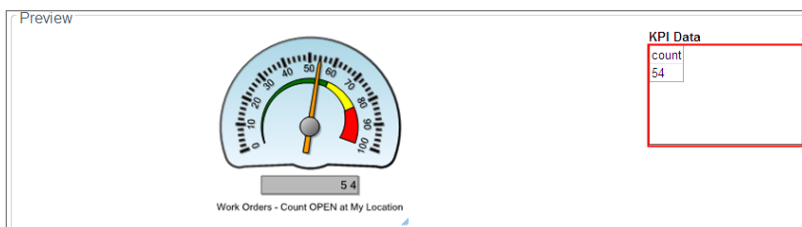
KPI Data

count	54
-------	----

- Click and drag the grabber on the bottom, right of the gauge to reduce/enlarge the gauge size.



4. The **KPI Data** driving the gauge also shows in the Preview area as shown below.



5. If no data is found, gauges in PMM and Dashboards modules display a consistent **NO DATA FOUND** message.



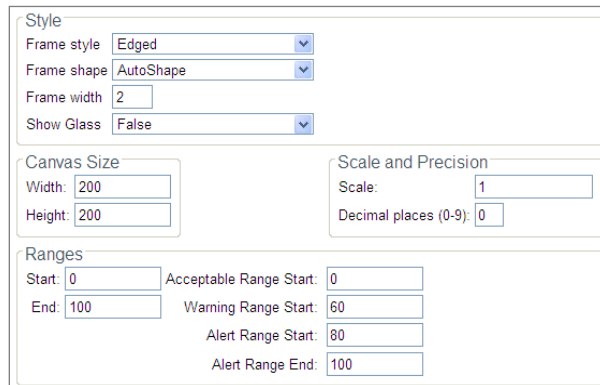
Colors

Colors		
Border Top	Black	
Border Bottom	Transparent	
Top	LightBlue	
Bottom	AliceBlue	
Text	Black	
Acceptable Range	Green	
Warning Range	Yellow	
Alert Range	Red	
Needle	Orange	
Tick & Number	Black	
Background	Silver	
Text Background	Transparent	

➡ Choose the colors from the drop-down lists for your gauge (border, text, warning, needle, etc.).

- **Border Top and Border Bottom:** The color of the outside frame of the gauge. You are only able to see the border if the frame width (in the Style section) is set higher than zero.
- **Top and Bottom:** The color of the gauge face.
- **Text:** The color of the numbers and title that appear on the gauge.
- **Acceptable Range:** The acceptable area color.
- **Warning Range:** The warning area color as well as the color of the gauge reading background when in the warning range.
- **Alert Range:** The alert area color as well as the color of the gauge reading background when in the alert range.
- **Needle:** The color of the gauge needle.
- **Tick and Number:** The color of the lines (ticks) and numbers on the gauge.
- **Background:** The default background color of the gauge reading (may be overridden by warning or alert range color).
- **Text Background:** The background color of the label text.

Style, Size, and Dial Positions

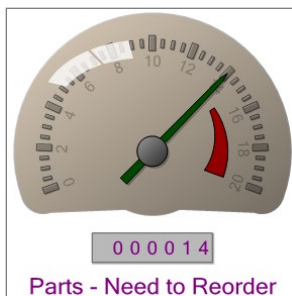


The screenshot shows a configuration window with four main sections:

- Style:** Contains dropdowns for 'Frame style' (set to 'Edged') and 'Frame shape' (set to 'AutoShape'), a text input for 'Frame width' (set to '2'), and a dropdown for 'Show Glass' (set to 'False').
- Canvas Size:** Contains text inputs for 'Width' (set to '200') and 'Height' (set to '200').
- Scale and Precision:** Contains a text input for 'Scale' (set to '1') and a text input for 'Decimal places (0-9)' (set to '0').
- Ranges:** Contains text inputs for 'Start' (0), 'End' (100), 'Acceptable Range Start' (0), 'Warning Range Start' (60), 'Alert Range Start' (80), and 'Alert Range End' (100).

➡ The **Style**, **Canvas Size**, **Scale and Precision**, and **Ranges** settings are populated according to your gauge selection. These settings may be edited according to preference.

- **Style:** Select the frame style and shape from the drop-down selection boxes. The frame width is visible when set to greater than zero. **Show Glass** refers to whether or not to display a glass face on the gauge.



Gauge with a glass face

- **Canvas Size:** Select the width and height of the gauge.
- **Scale and Precision:** Select the scale and precision (decimals) for the gauge.
 Note: The maximum character limitation for Scale field is 10 and the maximum value that can be entered in decimal places is 9.
- **Ranges:** Select the dial positions for the start and end range for the gauge. Select the acceptable, warning, and alert range starts and the alert range end.
 Note: The alert can also be set to a low range, i.e., to indicate when a value is too low and needs reordering.

Group Rights

The Group Rights section is where the gauge owner identifies the assigned groups that have permission to add this gauge to any dashboard for which the user has edit permissions (or that he owns), and also allows users in that group to view the gauge on any dashboards that they can view. Those who are not in the assigned group for a gauge will not see the gauge in the toolbox on the Dashboard Layout page. A special case scenario provides more detail about assigned groups, permissions and gauge visibility.

➡ Scenario: When User A and User B have rights to edit a dashboard and User A has permission to add the Gauge A1 to a dashboard but User B does not, User B will be able to view the dashboard, but the Gauge A1 will be hidden. For security purposes, if user B attempts to edit the dashboard, the Gauge A1 will show (only in edit view) but will have no data.

 Selecting the **All-Un Authenticated** group means you are giving rights to everybody, including the unauthenticated (not logged-in) users. Also, if this group is chosen, the SQL Select statement should not contain any user-related (FAVAR) keywords.

The 'Group Rights' window contains two lists: 'Available Groups' and 'Assigned Groups'. The 'Available Groups' list includes: All-Un Authenticated, ADMIN, ALLSCREENS, AVI-DASHBOARD1, AVI-EXECS, AVI-LEADMECH, AVI-MANAGER, and AVI-MECHANICS. Between the lists are two buttons: a right-pointing arrow (>) and a left-pointing arrow (<). The 'Assigned Groups' list is currently empty.

⚠ If you have gone through a conversion, be sure to share the migrated elements with one or more user groups, otherwise, they may not appear in the toolbox and therefore cannot be added to additional layouts. Migrated elements do not have owners but tab administrators and site administrators can edit their definitions. (This breaks the usual rule that only the owner can save changes to an element's definition.)

To assign groups permission:

1. Select the group from the **Available Groups** list and click the **>** button to move the group to the **Assigned Groups** list. To remove a group from the Assigned Groups list, select the group and click the **<** button.
2. Click the **Save** button to save your entries.
3. Click the **Delete** button to delete your entries.
4. Click the **Back** button to return to the Dashboard Settings page.

Charts

As mentioned above, charts are driven by SQL Select statements that contain x and y axis information. The Chart Settings page is where you create charts to add to your dashboard.

To define a chart:

➡ Click on the **Charts** link on the Dashboard Settings page.

The 'Dashboard Settings' window has two main sections. The left section, 'Manage Dashboard Components', lists 'Key Performance Indicators', 'Gauges', and 'Charts'. The 'Charts' link is circled in red with an arrow pointing to it. The right section, 'User Group Permissions', is a table with columns for 'User Group ID' and three 'Create and edit' permissions (gauges, charts, dashboards).

User Group ID	Create and edit gauges	Create and edit charts	Create and edit dashboards
ADMIN	☐	☐	☐
ALLSCREENS	☒	☒	☒
AVI-DASHBOARD1	☐	☐	☐
AVI-EXECS	☐	☐	☐
AVI-LEADMECH	☐	☐	☐
AVI-MANAGER	☐	☐	☐
AVI-MECHANICS	☐	☐	☐
AVI-SYADMIN	☐	☐	☐
FAGROUP	☐	☐	☐
FIRE - SHOP	☐	☐	☐
FLEET	☐	☐	☐
FLEET - SHOP	☐	☐	☐
FLEET SAFETY & ACCIDENT MGMT	☐	☐	☐
FLEET-DATE-MINIMUM	☐	☐	☐

The Chart Settings page displays.

Choose a chart to modify:
Delete

Chart Definition
Name:
Description:
Label Text: New Chart
KPI: Choose KPI
Horiz Axis Field Name:
Horz Axis Label:

Chart Series

Series	Vertical Axis Field Name	Chart Type	Legend Text	Show Values
1				☐
2				☐
3				☐

Preview

New Chart

Colors
Top: LightBlue
Bottom: AliceBlue
Text/Line Color: Black
Size/Position
Width: 500 pixels
Height: 200 pixels

Group Rights

Available Groups
All-Un Authenticated
AARONS RIGHTS TEMPLATE
ALLOCATION AND ASSIGNMENT OP:
ALLOCATION ASSIGNMENT ADMIN
AUTOMATION

Assigned Groups

Query Results

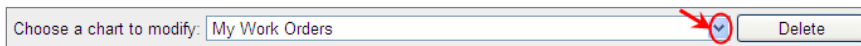
Back Save Refresh



Note: Charts and graphs are typically meant for KPI definitions that contain multiple rows. You may have up to three columns per row to represent multiple Series in a chart (plus one column for the vertical axis numeric value).

Create a Chart or Graph

1. To edit an existing chart or graph or to use an existing chart or graph as a template, select the name of the chart from the drop-down selection box.



The fields are populated based on your selection and you may edit them as desired.

2. If the correct chart or graph does not exist, define a new one by completing the fields as indicated below.
3. To delete a chart, select it from the drop-down list and click **Delete**.

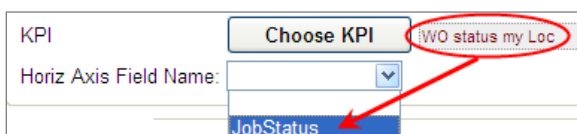
Chart Definition Settings

The main chart definition settings display in the next section of the page:



➡ Complete the fields based on the following information:

- **Name:** The name of the chart or graph.
- **Description:** A description for the chart or graph.
- **Label Text:** The text to display at the top of the chart/graph.
- **KPI:** The Key Performance Indicator. Click the **Choose KPI** button and select the desired KPI from the Ad Hoc Query KPIs or Advanced KPIs tabs on the **Choose KPI** pop-in. The KPI (query) is used to drive the chart/graph.
- **Horiz Axis Field Name:** The field from the KPI that is used for the horizontal axis (X-axis).



- **Horiz Axis Label:** The label you want to show on the horizontal axis.

Chart Series

The Chart Series section is where you determine the values for the Y axis.

Series	Vertical Axis Field Name	Chart Type	Legend Text	Show Values
1				☐
2				☐
3				☐

- **Vertical Axis Field Name:** Select the field from the KPI that is to be used for the Vertical Axis (Y-Axis).

Vertical Axis Field Name

CountJobStatus ☒

- **Chart Type:** Choose the style/type of graph for the series from the drop-down selection box.

 Note: The Stacked graphs require multiple values.

Chart Type

Column ☒

Line

Spline

Column

Area

Pie

StackedArea

StackedArea100

StackedColumn

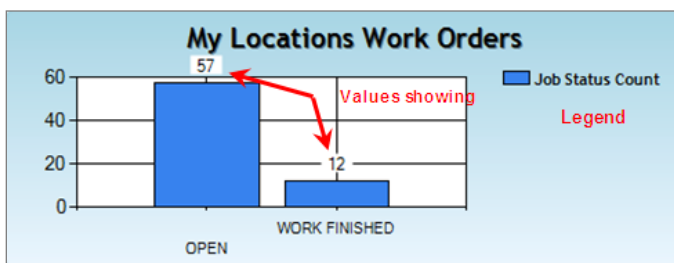
StackedColumn100

- **Legend Text:** Select the text for the chart legend.

Legend Text

Job Status Count

- **Show Values:** Check the box if you want values to show on the chart.

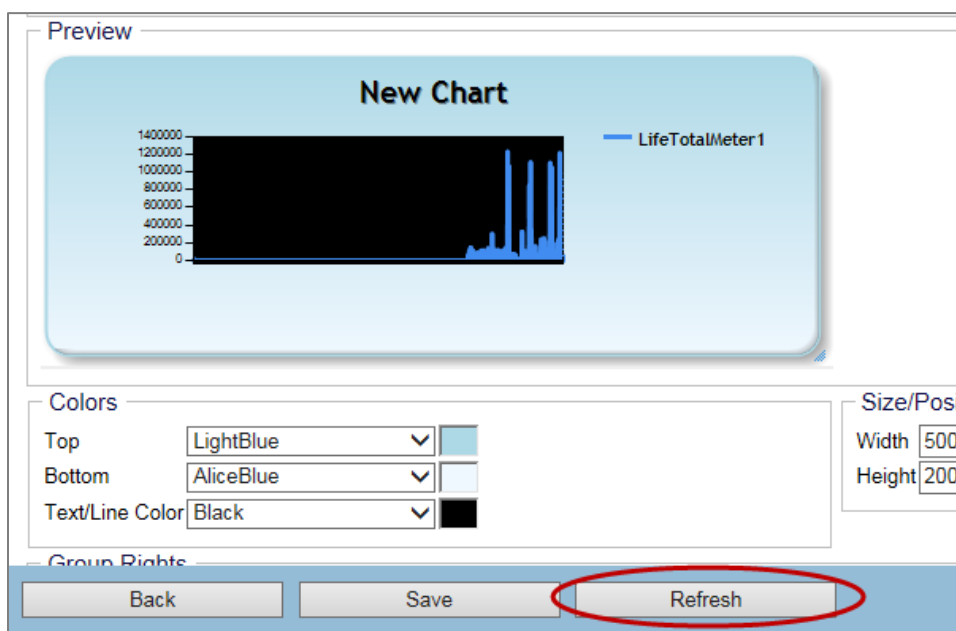


Preview

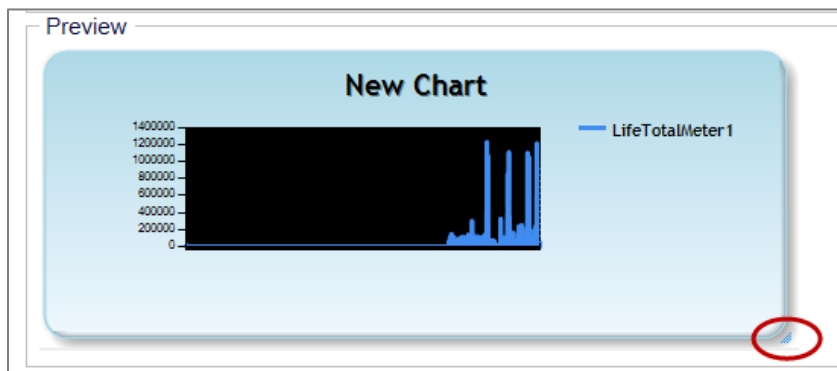
The **Preview** area provides a preview of how the chart will display based on the chart definition, series, colors, and size/position. As you make changes on this page, the **Refresh** button highlights yellow.

To see your changes:

1. At the bottom of the screen, click **Refresh** to see how your changes affect the chart in the **Preview** area.
2. Continue adjusting the settings and clicking the **Refresh** button until the desired look displays in the **Preview** area.



3. Click and drag the grabber on the bottom-right corner of the chart to change the chart size.



Colors and Size/Position

➡ Select the colors and size (in pixels) for the chart.

Colors		Size/Position	
Top	LightBlue	Width	586 pixels
Bottom	AliceBlue	Height	269 pixels
Text/Line Color	Black		



To view the chart properly, the width and height should be set to no less than 250.

Group Rights

The **Group Rights** section is where you, as chart owner, identify which groups will have this chart in their list of available elements to use when constructing a dashboard.

The Group Rights section is where the chart owner identifies the assigned groups that have permission to add this chart to any dashboard for which the user has edit permissions (or that he owns), and also allows users in that group to view the chart on any dashboards that they can view. Those who are not in the assigned group for a chart will not see the chart in the toolbox on the Dashboard Layout page.

Group Rights	
Available Groups	Assigned Groups
All-Un Authenticated AARONS RIGHTS TEMPLATE ALLOCATION AND ASSIGNMENT OP ALLOCATION ASSIGNMENT ADMIN AUTOMATION > <	



Important: If you have gone through a conversion, be sure to share the migrated elements with one or more user groups, otherwise, they may not appear in the toolbox and therefore cannot be added to additional layouts. Migrated elements do not have owners but administrators can edit their definitions. This breaks the usual rule that only the owner can save changes to an element's definition.

To add a group:

1. Select the group from the **Available Groups** list.
2. Click the > button to move the group to the **Assigned Groups** list.

To remove a group:

1. To remove a group from the **Assigned Groups** list, select the group.
2. Click the < button.

Query Results

The Query Results area shows the query results that drive the chart.

Complete the Chart Settings

1. Click **Refresh** to display the query results.
2. Continue modifying the settings until the chart displays correctly.
3. Click **Save** to save your entries.
4. Click **Delete** to delete your entries.
5. Click **Back** to return to the Dashboard Settings page.

See the following section for examples of various charts.

Chart Examples

This section provides some examples of chart types that may be created in the Dashboard Module.

Single Series Column Chart

The Chart Settings page below was used to create the following single series column chart.

Refresh
Save
Back

Choose a chart to modify: Safety Rating
Delete

Chart Definition
Name: Safety Rating
Description: example
Label Text: 3 month Avg Safety Rating
KPI: Choose KPI Sample Query B
Horiz Axis Field Name: columna

Chart Series

Series	Vertical Axis Field Name	Chart Type	Legend Text	Show Values
1	columnc	Column	loc id	☐
2				☐
3				☐

Preview

Colors
Top: LightBlue
Bottom: AliceBlue
Text/Line Color: Black

Size/Position
Width: 500 pixels
Height: 200 pixels

Group Rights
Available Groups: All-Un Authenticated, ADMIN, ALLSCREENS, AVI-DASHBOARD1, AVI-EXFCS
Assigned Groups:

Query Results

columna	columnc	columnb
15	89	CODE-B 25
20	79	CODE-C 45
25	99	CODE-A 35

Multiple Series Column Chart

You may display up to three series by choosing different field names from the KPI. The screenshot below shows two series.

Refresh

Save

Back

Chart Settings

Choose a chart to modify: Safety Rating Delete

Chart Definition

Name: Safety Rating

Description: example

Label Text: 3 month Avg Safety Rating

KPI: Choose KPI Sample Query B

Horiz Axis Field Name: columna

Chart Series

Series	Vertical Axis Field Name	Chart Type	Legend Text	Show Values
1	columnc	Column	columnc	☐
2	columnb	Column	columnb	☐
3				☐

Preview

Colors

Top: LightBlue

Bottom: AliceBlue

Text/Line Color: Black

Size/Position

Width: 500 pixels

Height: 200 pixels

Group Rights

Available Groups

All-Un Authenticated

ADMIN

ALLSCREENS

AVI-DASHBOARD1

AVI-FXCS

>

<

Assigned Groups

Query Results

columna	columnc	columnd	columnb
15	89	CODE-B 25	
20	79	CODE-C 45	
25	99	CODE-A 35	



If you define the other series Vertical Axis Fields but leave the Chart Type blank, it defaults to the first defined Chart Type.

Multiple Chart Types on a Single Chart

Multiple chart types may be mixed on the same chart as indicated in the screenshots below.

Chart Settings

Choose a chart to modify: Safety Rating

Delete

Chart Definition

Name: Safety Rating

Description: example

Label Text: 3 month Avg Safety Rating

KPI: Choose KPI Sample Query B

Horiz Axis Field Name: columna

Chart Series

Series	Vertical Axis Field Name	Chart Type	Legend Text	Show Values
1	columnnc	Line	columnnc	☐
2	columnb	Column	columnb	☐
3				☐

Preview

Colors

Top: LightBlue

Bottom: AliceBlue

Text/Line Color: Black

Size/Position

Width: 500 pixels

Height: 200 pixels

Group Rights

Available Groups

All-Un Authenticated

ADMIN

ALLSCREENS

AVI-DASHBOARD1

AVI-FXFC5

Assigned Groups

Query Results

columna	columnnc	columnb	columnb
15	89	CODE-B 25	
20	79	CODE-C 45	
25	99	CODE-A 35	

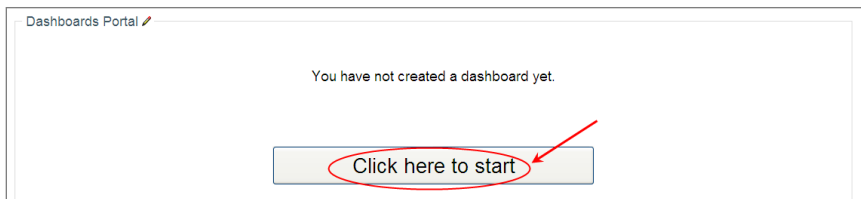
Once Gauges and Charts are defined, you may add them to the Dashboard as outlined in the next section.

Customize the Dashboard

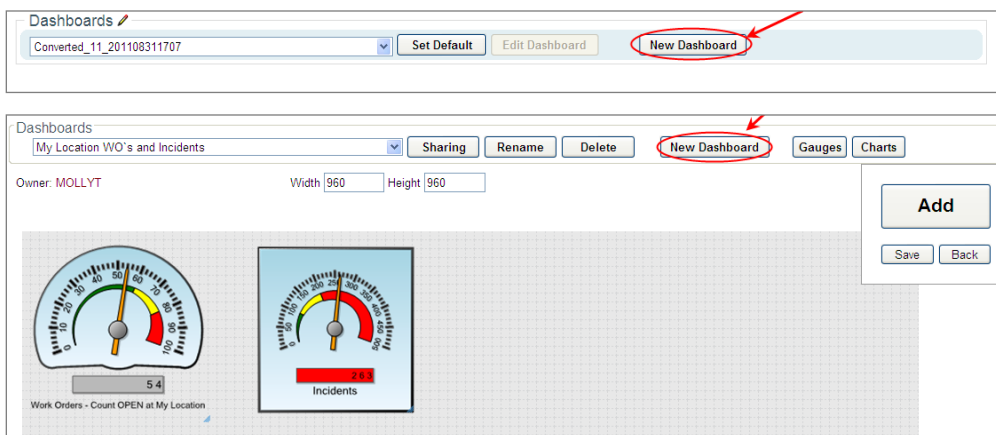
You may now use the elements created to build custom dashboards. To customize a dashboard, follow the steps provided in this section.

Create a Dashboard

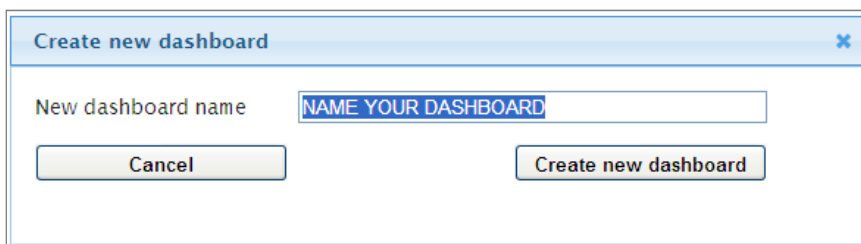
1. If you haven't previously created a dashboard, click **Click here to start** to begin creating your dashboard



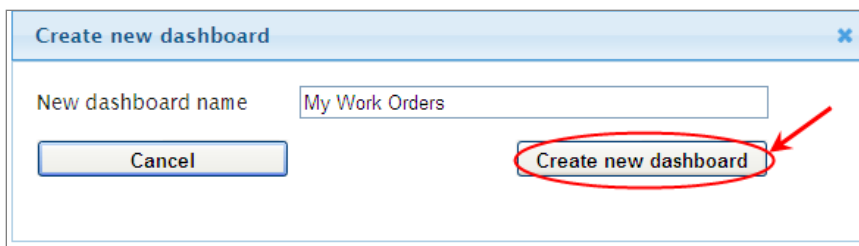
2. Otherwise, click the **New Dashboard** button on the **Dashboard Main** page or the **Dashboard Layout** page.



The Create new dashboard pop-in displays.

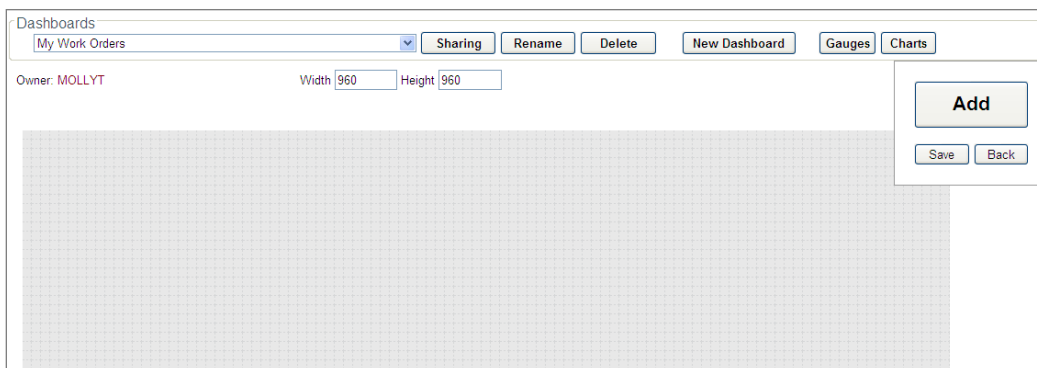


3. Enter the name for your dashboard and click **Create new dashboard**.



A dialog box titled "Create new dashboard" with a close button (X) in the top right corner. It contains a text input field labeled "New dashboard name" with the value "My Work Orders". Below the input field are two buttons: "Cancel" on the left and "Create new dashboard" on the right. The "Create new dashboard" button is circled in red, and a red arrow points to it from the right.

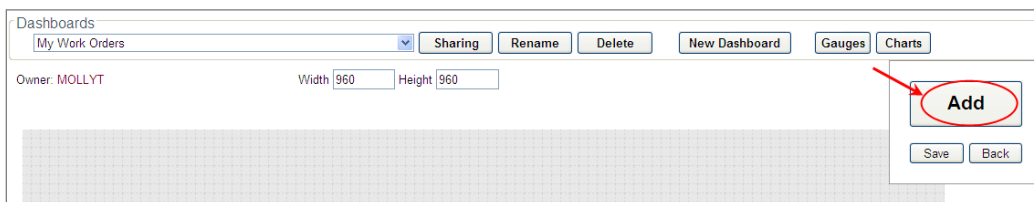
You are taken to an empty Dashboard Layout page. The dashboard title displays in the drop-down box. The dashboard owner along with the default height and width (960) also show at the top of the dashboard layout.



The "Dashboards" management interface. At the top, there is a dropdown menu showing "My Work Orders", followed by buttons for "Sharing", "Rename", "Delete", "New Dashboard", "Gauges", and "Charts". Below these, it shows "Owner: MOLLYT", "Width: 960", and "Height: 960". The main area is a large grid. On the right side, there is a panel with an "Add" button, and below it, "Save" and "Back" buttons.

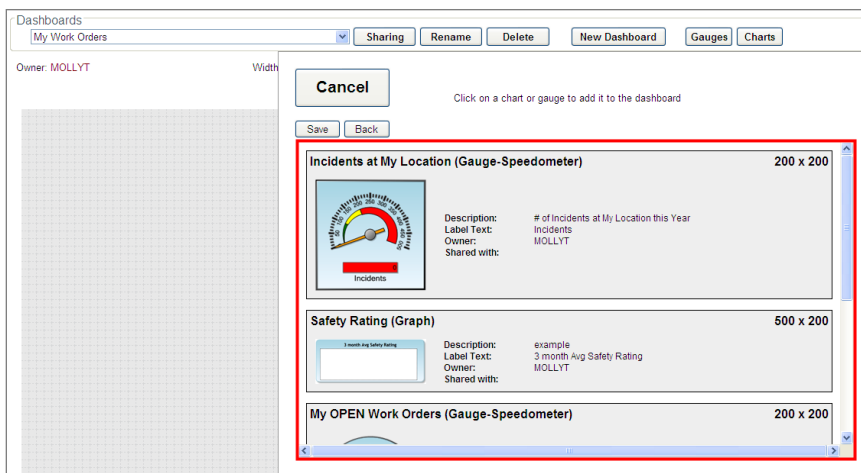
 **Note:** This layout page is configurable and may include more than nine gauges or other elements on it. If your organization supports wide screens, you may increase the width.

4. Click **Add** to go to the Dashboard toolbox to add a gauge or chart to the dashboard:

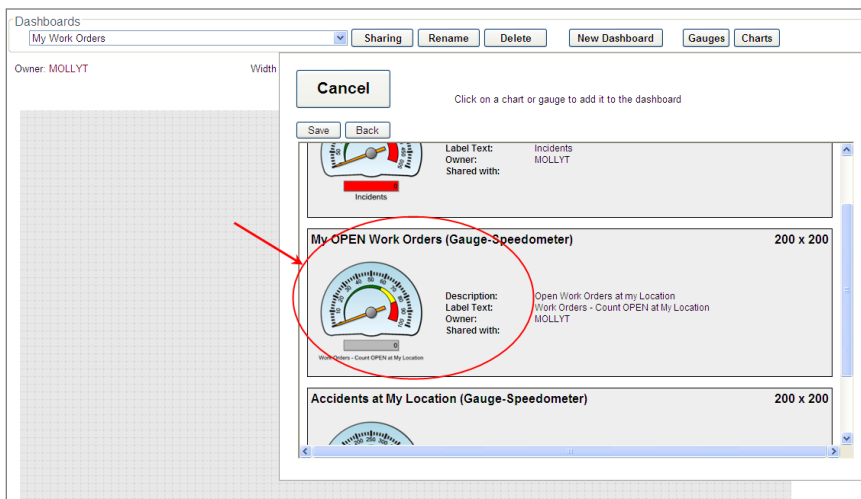


The same "Dashboards" management interface as above. The "Add" button in the right-hand panel is circled in red, and a red arrow points to it from the right.

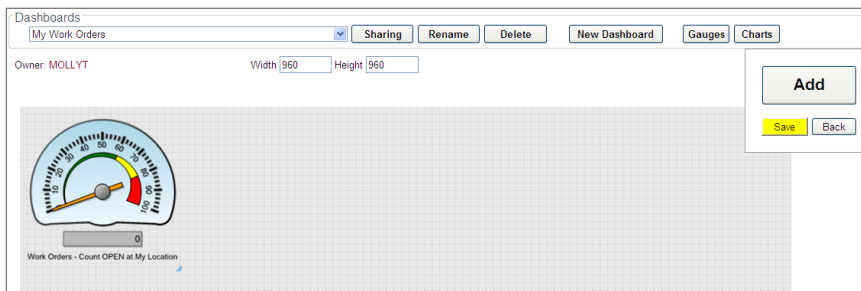
The Dashboard Toolbox displays all the charts and gauges available to add to the dashboard. Use the scroll bar on the right side of the toolbox to see all available elements. The toolbox only shows gauges and charts that you own or that you have been given permission to view via the Group Sharing section on the gauge/chart settings pages.



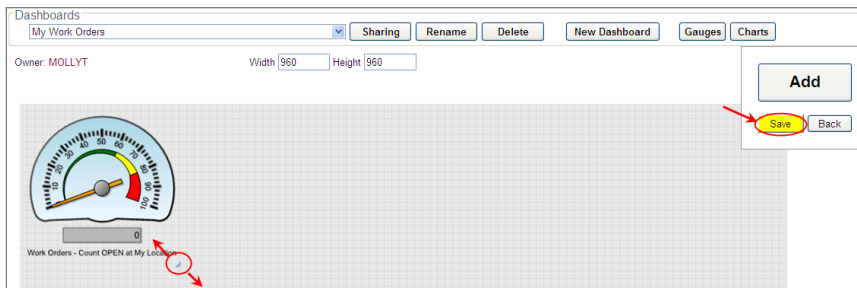
- Click on the chart or gauge to add it to the dashboard.



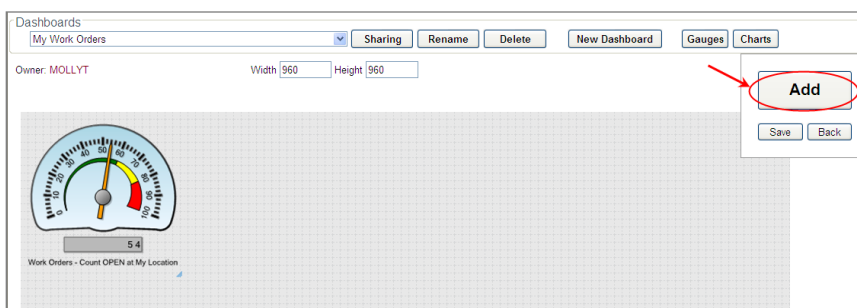
The selected gauge or chart displays on the dashboard with a highlighted **Save** button to indicate changes were made to the dashboard that need to be saved.



- To reduce or enlarge the element, use the grabber on the bottom-right of the gauge or chart to size to the necessary size, and click **Save** to save your changes.

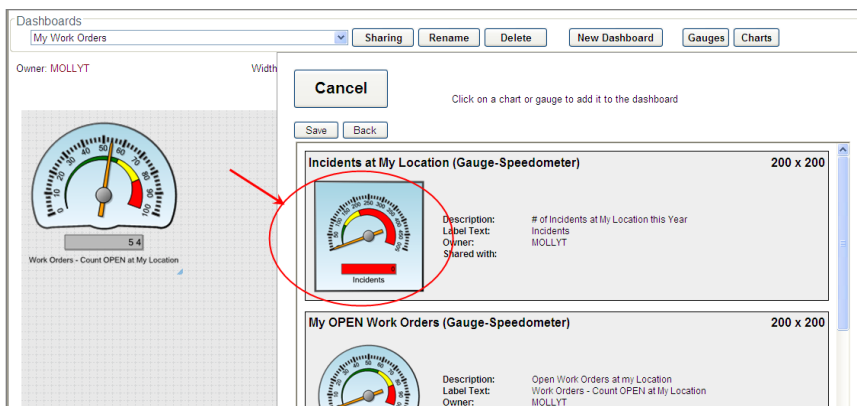


- Click the **Add** button to add another element to the dashboard.

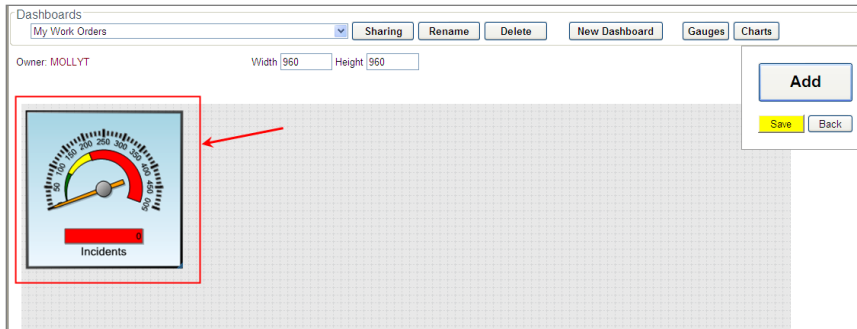


The toolbox displays the elements.

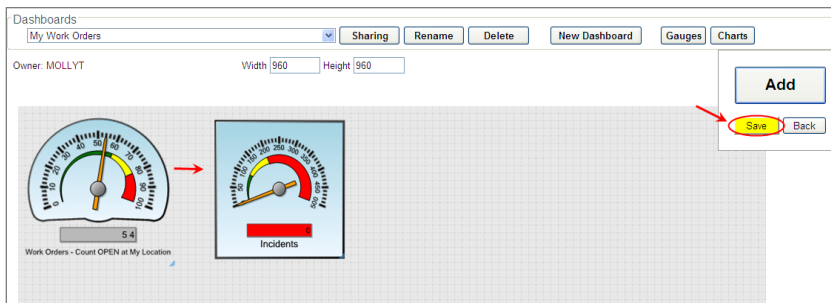
- Click on a gauge or chart in the toolbox to select it.



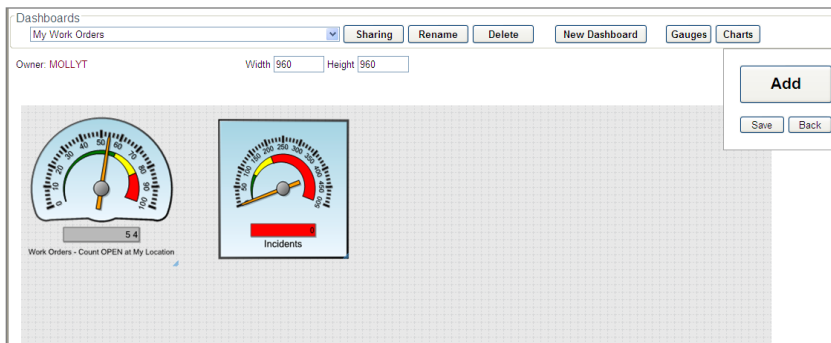
The element appears stacked on top of the previous element on the layout.



- Click and drag to move the element to the desired location on the dashboard. Resize the element with the grabber if necessary, and click **Save** to save your changes.



The updated dashboard layout displays.



Continue adding and saving elements to the dashboard as desired.

- Click **Back** to return to the Dashboard Main page to see the finished dashboard.

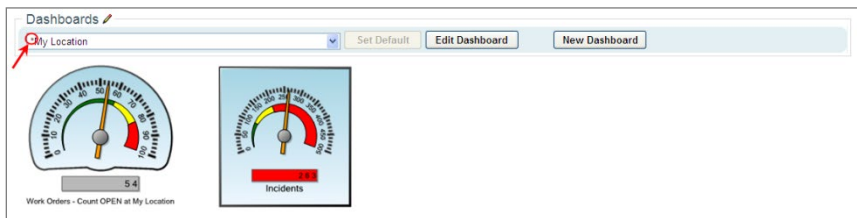


Set Default Dashboard

1. To set a dashboard as the default, select a dashboard from the drop-down list and click the **Set Default** button. The default is saved per-user and determines the dashboard shown when you first access the tab.



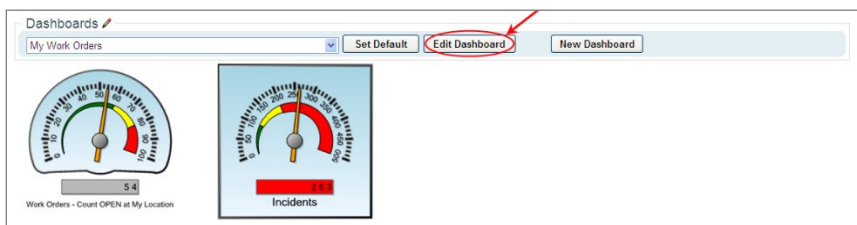
*The default dashboard shows with an asterisk in its name and the **Set Default** button is disabled.*



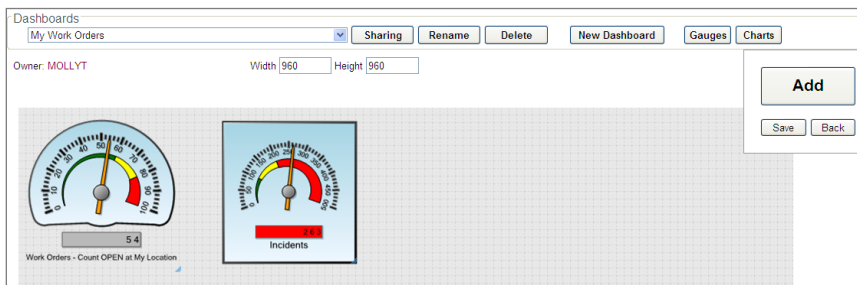
2. To change the default dashboard, select a different dashboard from the drop-down list and click the **Set Default** button.

Edit a Dashboard

1. To edit a dashboard, select the dashboard from the drop-down list and click the **Edit Dashboard** button.



The Dashboard Layout page displays.



On the Dashboard Layout page, you may perform many functions including editing the elements and sharing, renaming and deleting the dashboard as discussed below.

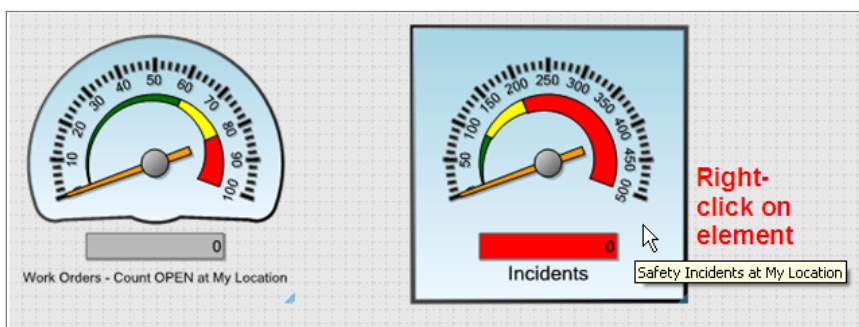
2. You can also click the **New Dashboard** button to create a new dashboard or click the **Gauges** and **Charts** buttons to access the Gauge Editor and Chart Settings pages, Please refer to the [Create a Dashboard](#), [Gauges](#), and [Charts](#) sections above for more information about these buttons.

Edit an Element

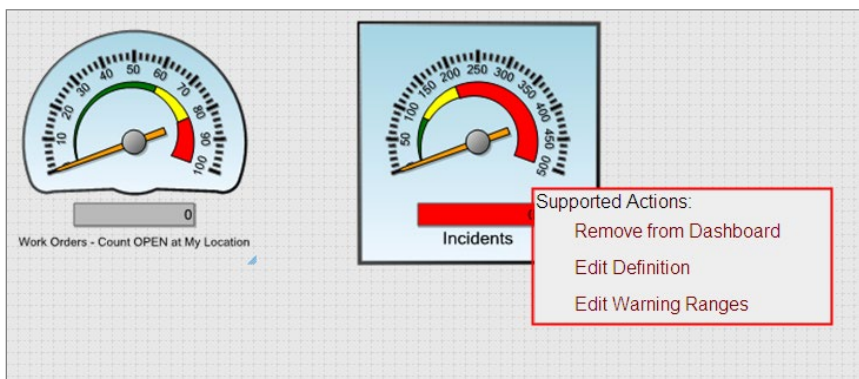
Once on the Dashboard Layout page, you can easily link to the following supported actions: **Remove from Dashboard**, **Edit Definition**, and **Edit Warning Ranges** as outlined in this section.

Remove from Dashboard

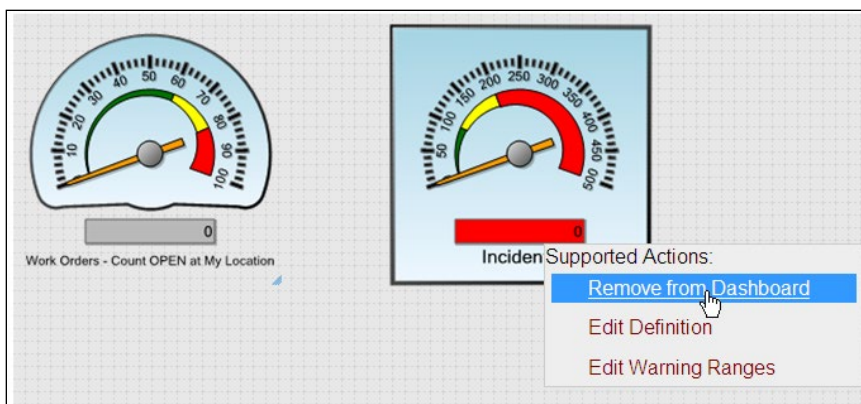
1. To edit a dashboard element, right-click on an element.



Supported Actions links display.

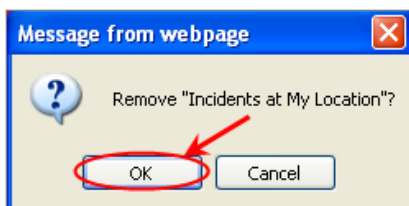


2. To remove the element from the dashboard, click the **Remove from Dashboard** link.

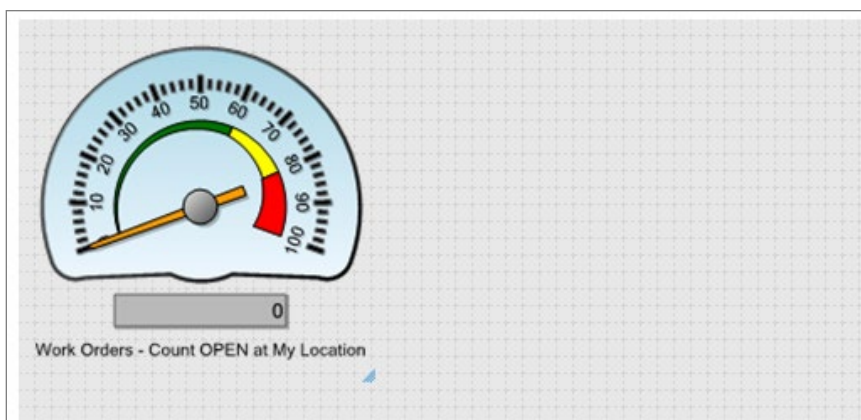


A message displays to verify that you want to remove the element.

3. Click **OK** to remove the element from the dashboard. This will also remove any custom ranges on the element instance, but will not delete the gauge or chart definition.
4. After deleting an element you must click **Save** to commit the changes. If you mistakenly remove an element from the layout, you can click **Back** and lose your changes.



The element no longer displays on the dashboard layout.

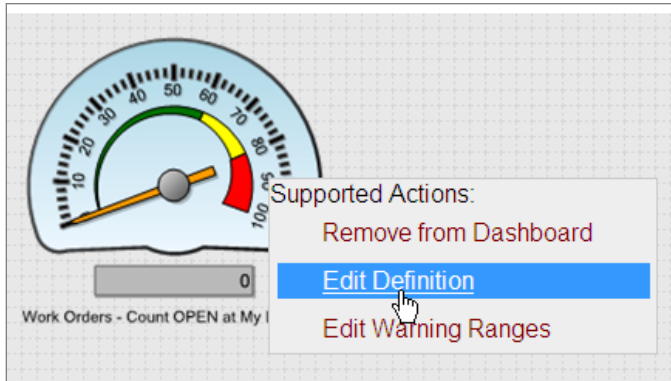


Edit Definition

Editing the definition will define colors, basic style, and default values for the ranges.

1. To edit an element definition, right-click on the element on the Dashboard Layout page and select the **Edit Definition** link.

The Gauge Editor or Chart Settings page displays so you may edit the element definition.



2. Make desired edits and click the **Refresh** button to refresh the view.
3. Click the **Save** button to save your changes.
4. Click the **Back** button to go back to the Dashboard Layout page.

Edit Warning Ranges



Note: This feature is only available for Gauges.

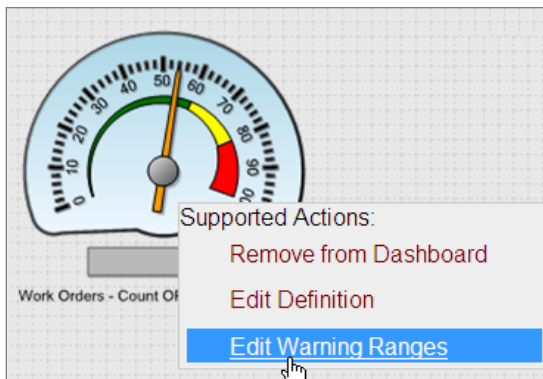
When an element is added to a dashboard (layout), the default ranges values from the definition are copied into an instance record. Subsequent changes to the definition will not affect the instance ranges. Other properties come from the definition, but you will need to edit start and end and warning ranges on the instance directly to change ranges as shown in the steps below. This allows managers who oversee multiple locations, for example, to use the same basic gauge and KPI but to focus on the big picture ranges. Whereas, single-shop managers may have different ranges that they care about (may also depend on which shop, is it big or small, etc.).



To restore an instance's ranges to the default values, you must remove the instance from the dashboard, **SAVE** the dashboard, and re-add the instance. (This is because removing an instance does not auto-save. So if you accidentally remove the wrong instance, you can revert to the previous values by using the **Back** button and losing your changes)

To edit the instance warning ranges:

1. Right-click the element and select the Edit Warning Ranges link.



The Ranges pop-in for the element displays.

Ranges: My OPEN Work Orders

Ranges

Start: 0	Acceptable Range Start: 0
End: 100	Warning Range Start: 60
	Alert Range Start: 80
	Alert Range End: 100

Cancel Save

2. Edit the ranges as desired and click the **Save** button.

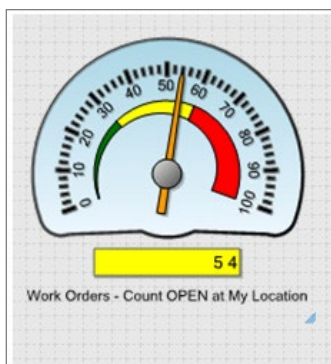
Ranges: My OPEN Work Orders

Ranges

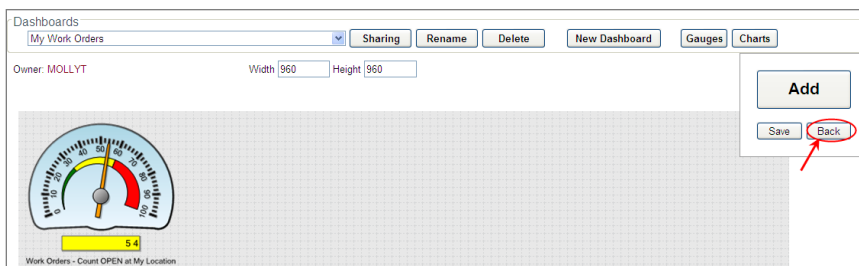
Start: 0	Acceptable Range Start: 0
End: 100	Warning Range Start: 30
	Alert Range Start: 60
	Alert Range End: 100

Cancel Save

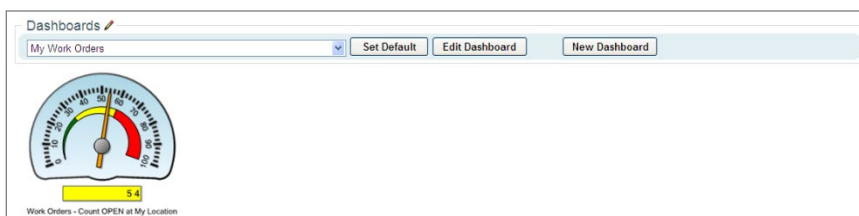
The element displays in the dashboard with the new range settings.



- Click the **Back** button to return to the Dashboard Main page.



The dashboard displays and the newly created dashboard is available to select from the drop-down list.



Share a Dashboard

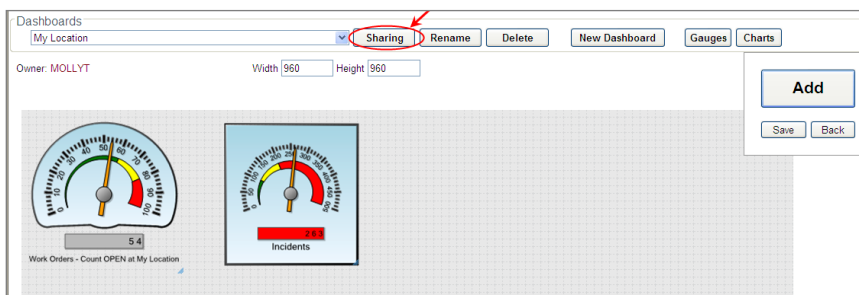
After you have created a dashboard, you can allow others to view or edit it within the module.

When you give permissions to view a dashboard, the user will see that dashboard, but it will only show the gauges and charts that they have permission for (defined in user group sharing section on gauge and chart definition pages).

When you give permissions to edit a dashboard, and the user is in edit mode (on the Layout page), they will see ALL gauges and charts that were added to that dashboard. However, if there are any gauges/charts that they do not have permission to view (defined in user group sharing section on gauge/chart definition pages); those elements will not load data (for security reasons).

To share a dashboard:

- Click the **Sharing** button to give groups rights to view or edit the dashboard.



Dashboard sharing: My Work Orders

Group Rights

User Group ID	Allow View	Allow Edit
All-Un Authenticated	☐	
ADMIN	☐	☐
ALLSCREENS	☐	☐
AVI-DASHBOARD1	☐	☐
AVI-EXECS	☐	☐
AVI-LEADMECH	☐	☐
AVI-MANAGER	☐	☐
AVI-MECHANICS	☐	☐
AVI-SYSADMIN	☐	☐
FAGROUP	☐	☐
FIRE - SHOP	☐	☐
FLEET	☐	☐
FLEET - SHOP	☐	☐
FLEET SAFETY & ACCIDENT MGMT	☐	☐

Cancel Save

- Select the groups that you, as owner of the dashboard, want to grant view or edit rights, and click **Save** to save the selection.

Dashboard sharing: My Location

Group Rights

User Group ID	Allow View	Allow Edit
All-Un Authenticated	☐	
ADMIN	☐	☐
ALLSCREENS	☒	☒
AVI-DASHBOARD1	☐	☐
AVI-EXECS	☐	☐
AVI-LEADMECH	☐	☐
AVI-MANAGER	☐	☐
AVI-MECHANICS	☐	☐
AVI-SYSADMIN	☐	☐
FAGROUP	☐	☐
FIRE - SHOP	☐	☐
FLEET	☐	☐
FLEET - SHOP	☐	☐
FLEET SAFETY & ACCIDENT MGMT	☐	☐

Cancel Save

Successful Update displays.

Dashboard sharing: My Location

Group Rights

User Group ID	Allow View	Allow Edit
All-Un Authenticated	☐	☐
ADMIN	☐	☐
ALLSCREENS	☒	☒
AVI-DASHBOARD1	☐	☐
AVI-EXECS	☐	☐
AVI-LEADMECH	☐	☐
AVI-MANAGER	☐	☐
AVI-MECHANICS	☐	☐
AVI-SYSADMIN	☐	☐
FAGROUP	☐	☐
FIRE - SHOP	☐	☐
FLEET	☐	☐
FLEET - SHOP	☐	☐
FLEET SAFETY & ACCIDENT MGMT	☐	☐

Cancel Save **Successful update.**

- Click the X to close the pop-in.

You are returned to the Dashboard layout.

Dashboards

My Location Sharing Rename Delete New Dashboard Gauges Charts

Owner: MOLLYT Width 960 Height 960

Add

Save Back

Work Orders - Count OPEN at My Location

Incidents

- Click the **Back** button to return to the Main Dashboard page.

Rename a Dashboard

To rename a dashboard:

- On the Main Dashboard module page, click **Edit Dashboard**.

Dashboards

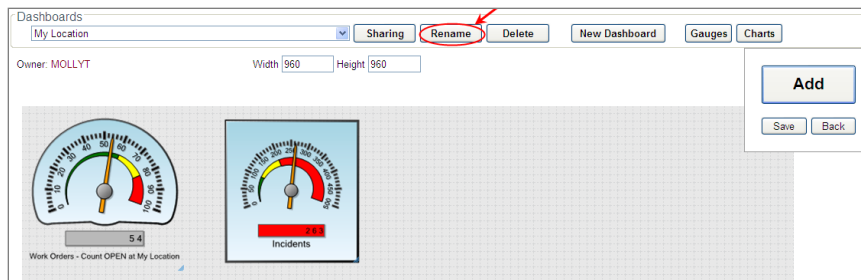
My Location Set Default **Edit Dashboard** New Dashboard

Work Orders - Count OPEN at My Location

Incidents

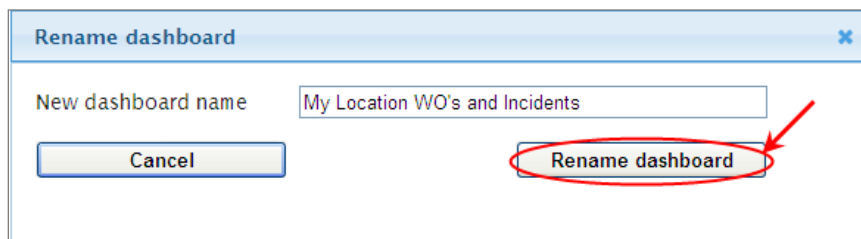
The Dashboard Layout page displays.

- Click the **Rename** button.

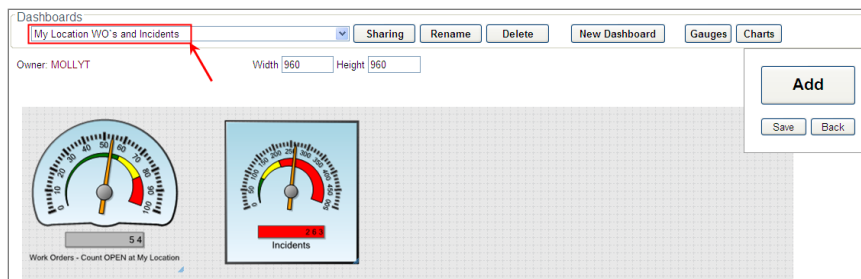


The Rename dashboard pop-in displays.

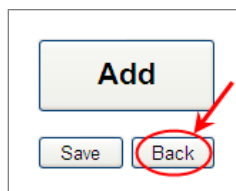
3. Enter the new dashboard name and click **Rename dashboard**.



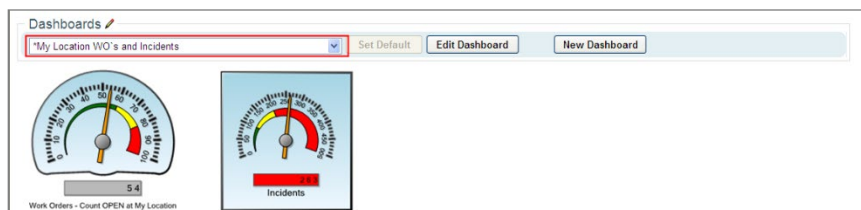
The new dashboard name displays in the drop-down list on the Dashboard Layout page.



4. Click **Back** to return to the Dashboard Main page.



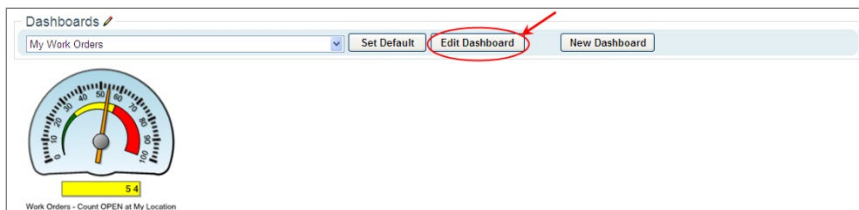
The Dashboard Main page shows the newly named dashboard in the drop-down list.



Delete a Dashboard

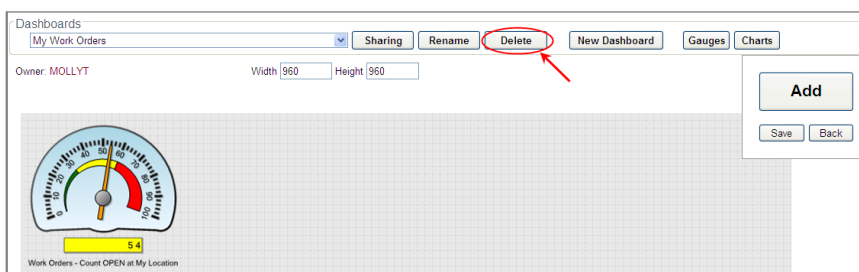
To delete a dashboard:

1. On the Main Dashboard module page, select the dashboard to delete from the drop-down list and click the **Edit Dashboard** button.



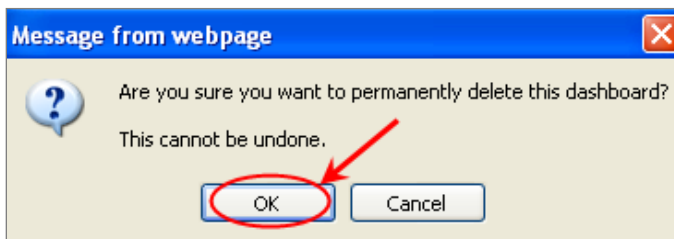
The Dashboard Layout page displays.

2. Click the **Delete** button.



A Message from webpage displays to verify that you want to permanently delete the dashboard.

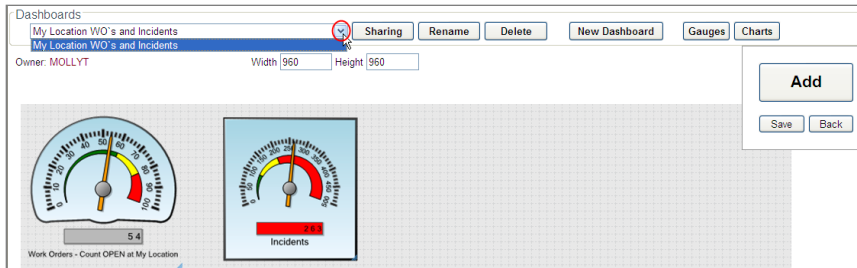
3. Click the **OK** button to delete the dashboard.



An additional message displays to verify that you want to delete the dashboard PERMANENTLY.

4. Click **OK** to permanently delete the dashboard.

You are returned to the Dashboard Layout page and the dashboard no longer exists in the drop-down list.



5. Click **Back** to return to the Dashboard Main page.

5. Finishing

After you have configured the Dashboard module, be sure to exit your browser and open a new browser window prior to using the Dashboard module.