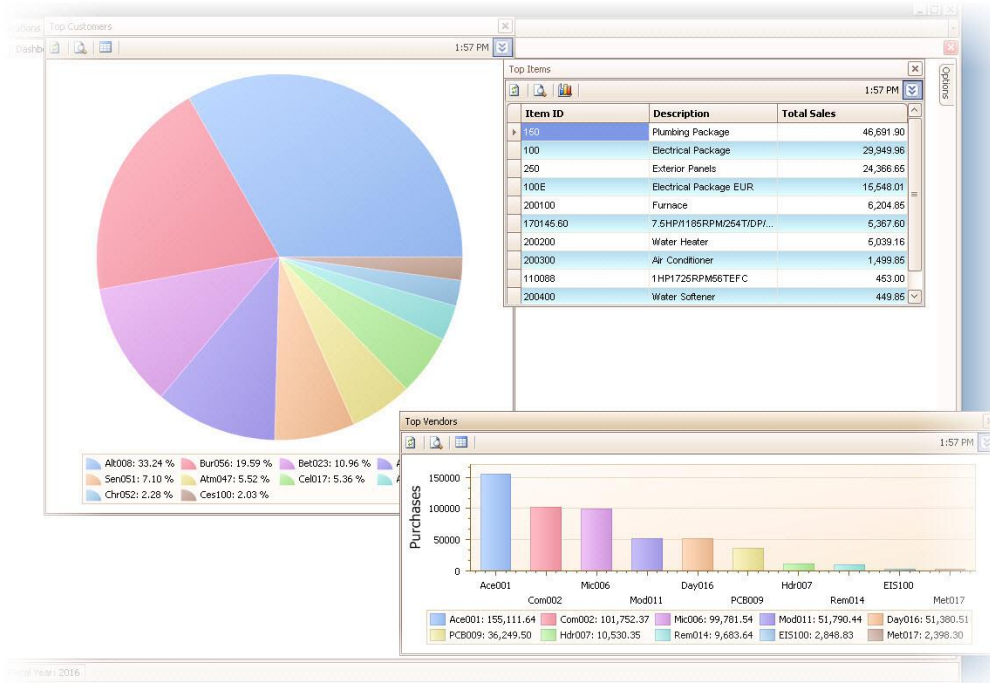




# Dashboard Tutorial

A Tutorial for Setting up View-at-a-Glance Business Information

Knowledge Base Article



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This document describes the intended features and technology for TRAVERSE version 11 as of October 2016. Features and technology are subject to change and there is no guarantee that any particular feature or technology described in this presentation will be present in this or subsequent versions of TRAVERSE.

October 2016

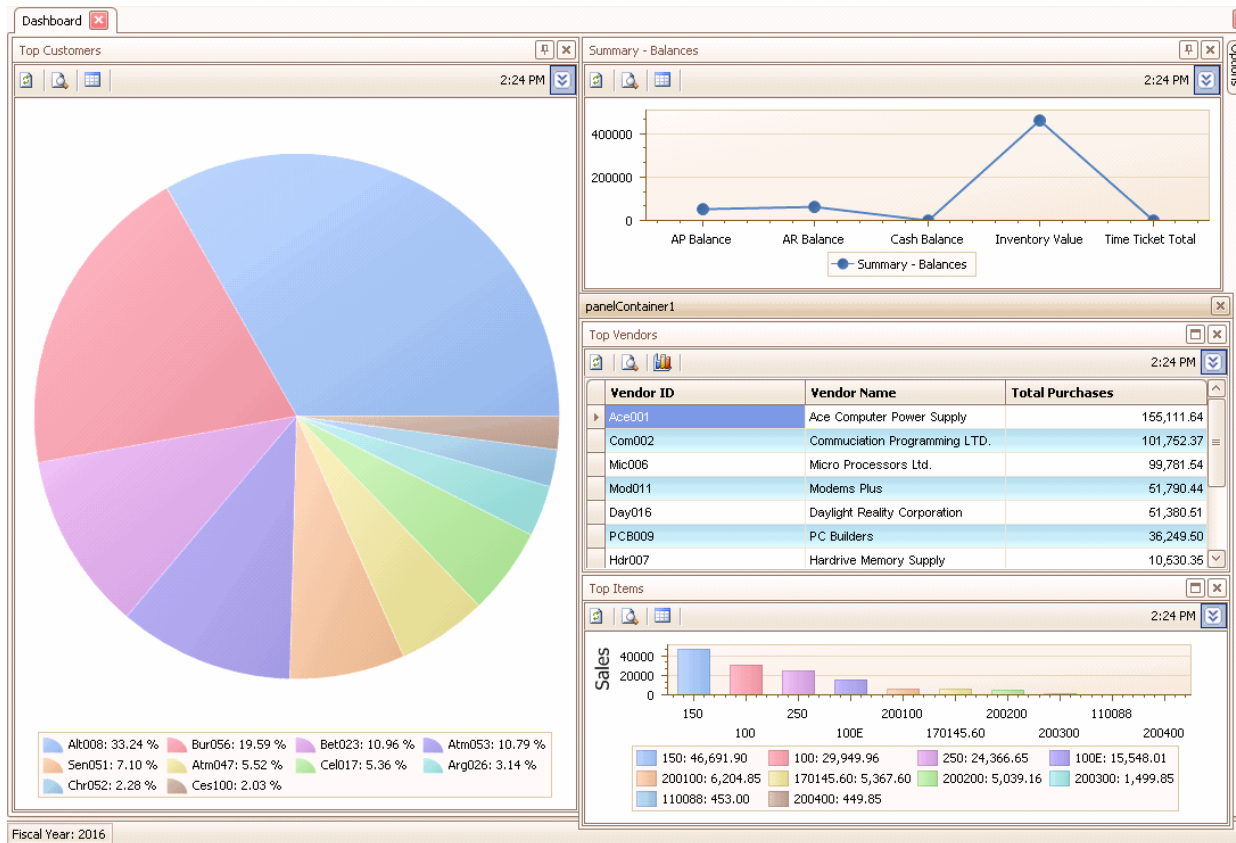
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# Introduction

The Dashboard displays useful data from TRAVERSE applications in a convenient and visually pleasing format. This tutorial will take you through the necessary steps to become familiar with the Dashboard application, such as how to select charts, customize the view, and adjust filters for charts to customize the data shown. With this knowledge, you will be able to view or display your company's business information with ease.

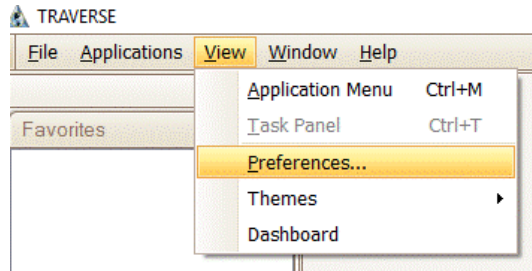
When discussing the Dashboard and its components, each chart or graph is referred to as an *object, tile, or object tile*. Objects allow you to view business data.



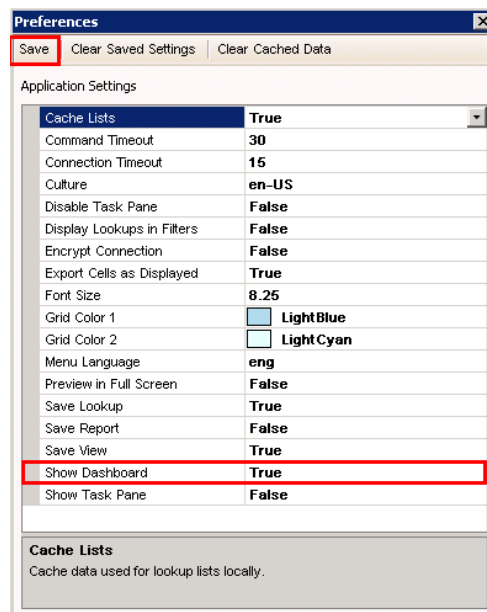
## Accessing the Dashboard

The first time you use the Dashboard, you must set your Preferences to display the Dashboard.

Click **View** on the menu bar, then select **Preferences...**

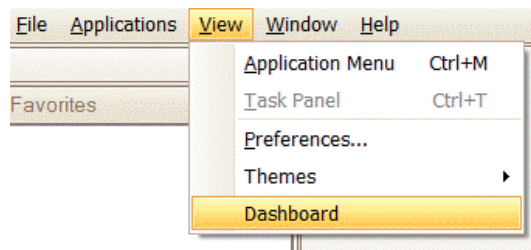


The Preferences window will appear. To allow the Dashboard to display, select **True** for the **Show Dashboard** option, then click **Save** to save your changes.



Close the Preferences window by using the **X** in the upper right corner of the window.

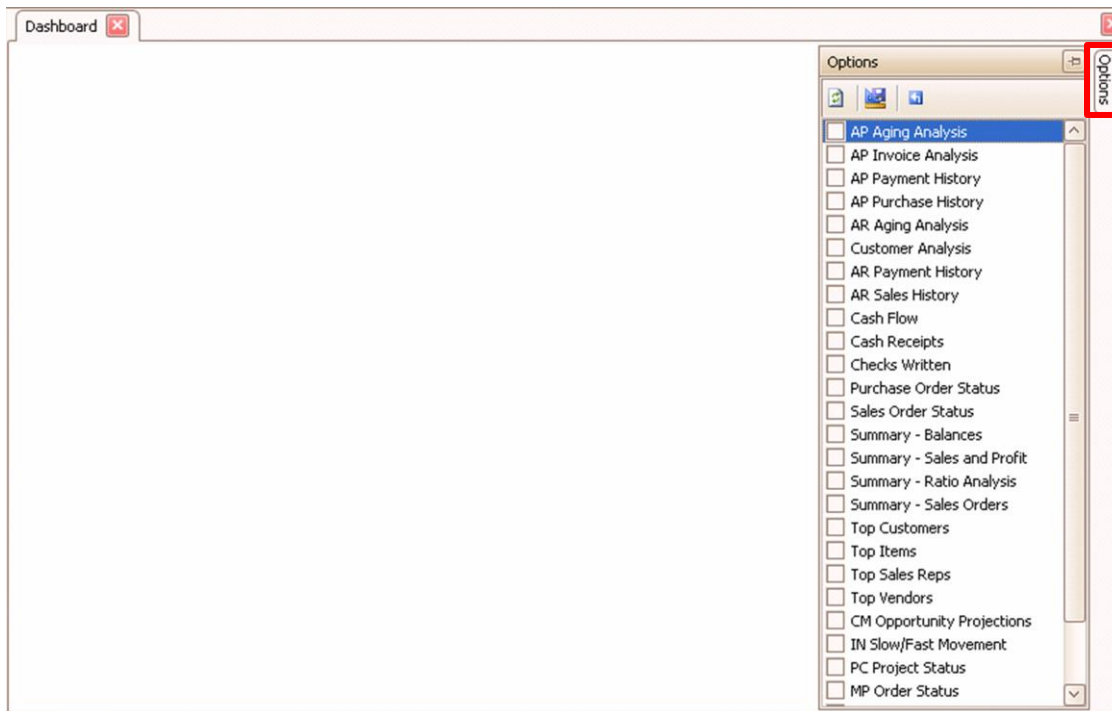
To show the Dashboard, click **View** on the menu bar, then select **Dashboard**.







## Navigating the Options Menu

Use the Options Menu on the right side of the screen to select the object tiles you want to see displayed on the Dashboard.

Click the Options tab to open the Options menu. The Options menu lists the objects available to add to your Dashboard.



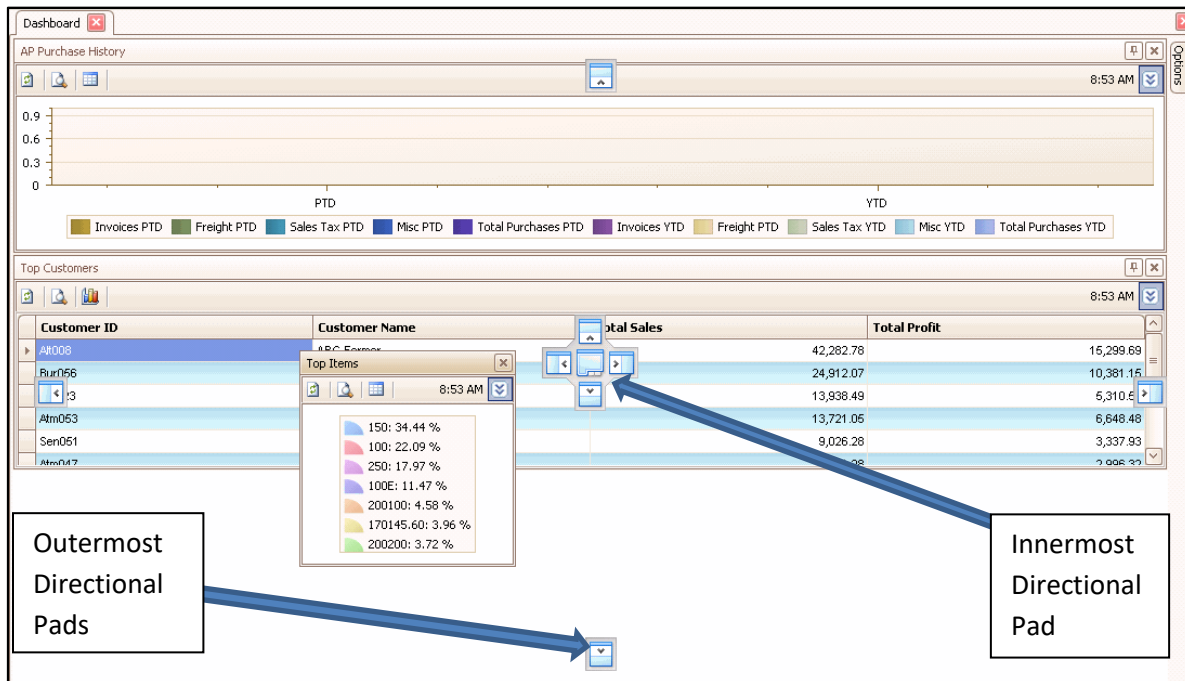
- Mark the objects you would like to appear on the Dashboard. Once you have selected the objects for your Dashboard, click the **Refresh** button (  ) on the Options menu.
- Save the current dashboard screen by clicking the **Save Layout** button (  ) on the Options menu.
- If you reorganize the dashboard, but wish to reset the screen to the previously-saved layout, click the **Restore Saved Layout** button (  ) on the Options menu.
- To see a print preview of the Dashboard, click the **Print Preview** button (  ) on the toolbar.

## Moving, Resizing, and Pinning the Object Tiles

As with other Microsoft® Windows software, you can drag and drop the object tiles in the dashboard area, as well as resize them.

### Moving the Dashboard Object Tiles

Click on the Title Bar of the dashboard tile, drag the tile into place, and drop the tile. Use the Automatic Controls to place the tiles.



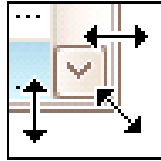
Dropping the window on the innermost directional pad will place the window in the available space, not interfering with the other windows.

Dropping the window on the outermost directional pad will place the window in the outside edges of the dashboard window.

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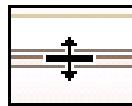
## Resizing the Dashboard Windows

With a floating window, move the cursor to the edge of the window until a double-headed arrow appears.



Click and drag to the desired size, then.


With an anchored window, move the cursor to the edge of the window until the cursor turns into a double-headed arrow.



Click and drag the edge to the desired size, then drop the edge.

## Pinning the Dashboard Windows


You can also pin the dashboard windows to the Dashboard tab. This allows you to keep the window available, but “hidden” or minimized.

Click on the **Pin** button (  ) to pin the window. The window remains available, but “hidden”.

You can expand or “show” the window by clicking it.



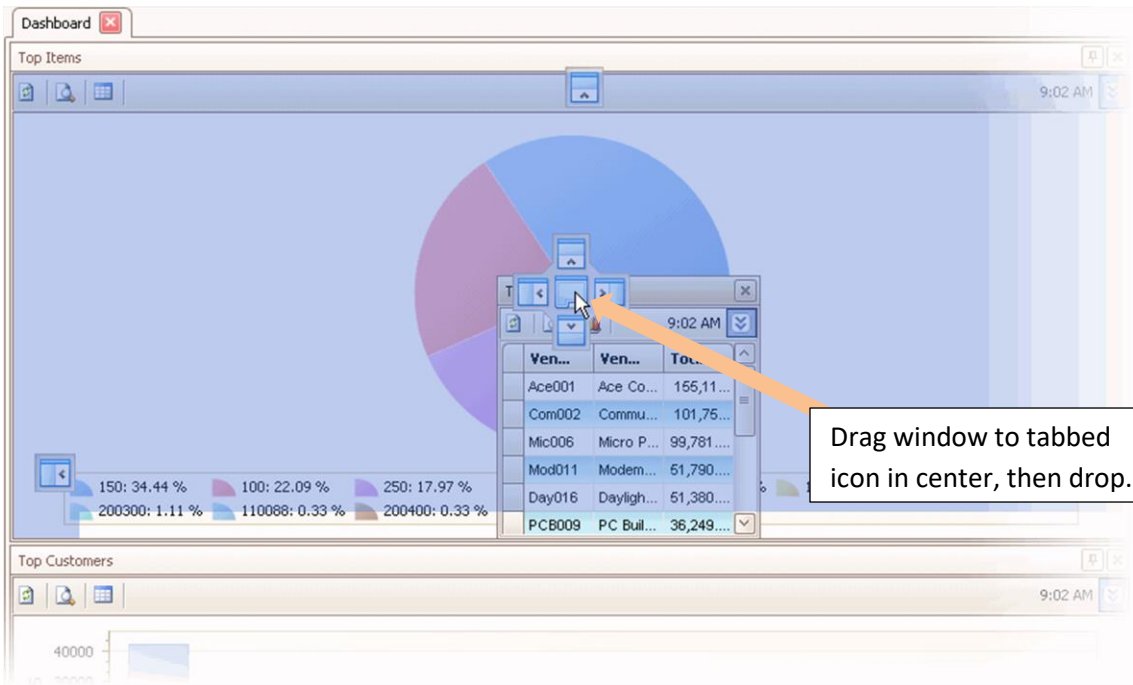
“Hide” the window again by clicking on another window.

To unpin the window, expand it by clicking on the window, then click the **Unpin** button (  ). The window will return to its previous position.

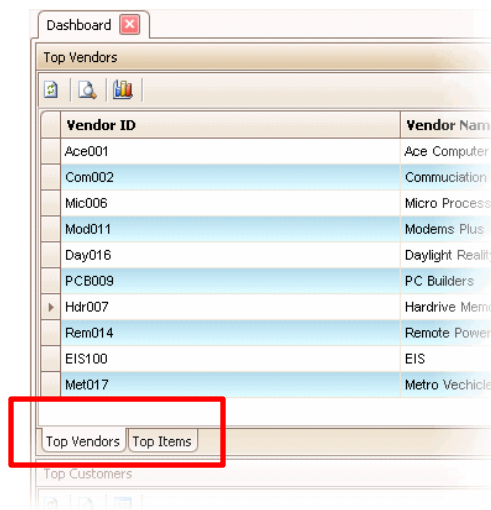
## Setting the Dashboard Windows as Tabs

To increase the number of windows available on the dashboard, you can set each window as a tab.

Click on the Title Bar of the dashboard window to float the window, then drag the window to innermost directional pad, and drop the window when the center of the directional pad is highlighted.



The window is now a tab. To return the tab to a floating window, click and drag the tab for the window.






## Working With the Views and Data

You have many options for adjusting the appearance of a view, as well as limited manipulation of the data and reviewing the source data.

### Grid Options

To view the window data as a grid, click on the Grid toggle button (  ). The data will appear in a grid.

Vendor ID	Vendor Name	Total Purchases
Ace001	Ace Computer Power Supply	155,111.64
Com002	Commuciation Programming LTD.	101,752.37
Day016	Daylight Reality Corporation	51,380.51
EIS100	EIS	2,848.83
Hdr007	Hardrive Memory Supply	10,530.35
Met017	Metro Vechicle Leasing Inc.	2,398.30
Mic006	Micro Processors Ltd.	99,781.54
Mod011	Modems Plus	51,790.44
PCB009	PC Builders	36,249.50
Rem014	Remote Power Supply Inc.	9,683.64

The column header allows you the option to sort the column alphabetically by clicking on it. The sort will toggle between ascending order (A to Z) and descending order (Z to A).

Use the Filter on the column header to filter the column by a specific value, whether the cell is blank or populated, or you can create your own customer filter.

Right-click on the column header to open a menu with these options:

Consolidates the data below the selected Column header

For Group By Box, use Group By This Column

Opens a Window where you can drag and drop Columns allowing you to Customize which Columns you want to display

Adjusts an individual Column to the best fit within the Window

Opens up the Create Filter Window

Right-click on the leftmost header cell to open another menu with similar options:


Vendor ID	Vendor
Ace Cor	
Commuc	
Daylight	
EIS	
Hardrive	
Metro Vi	
Micro Pr	
Modems	
PC Builc	
Remote	

Allows you to **select the Columns** you want to **display** on the **Grid**.

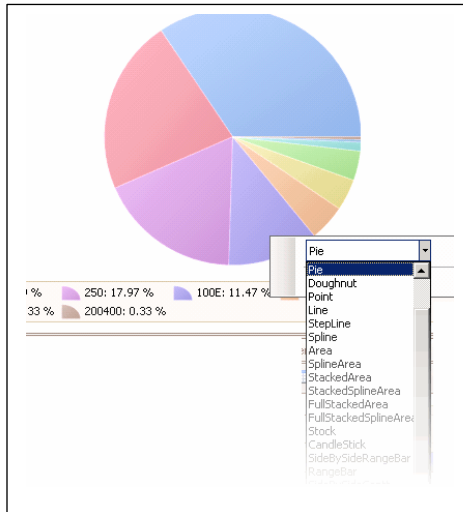
**Copy, Paste** and **Delete** allow you to copy Cells to your clipboard, Paste data from the Cells to a spreadsheet, and delete selected Cells.

**Opens up Create Filter** that can be manipulated to **display** the data of your choosing, based on the selected criteria.

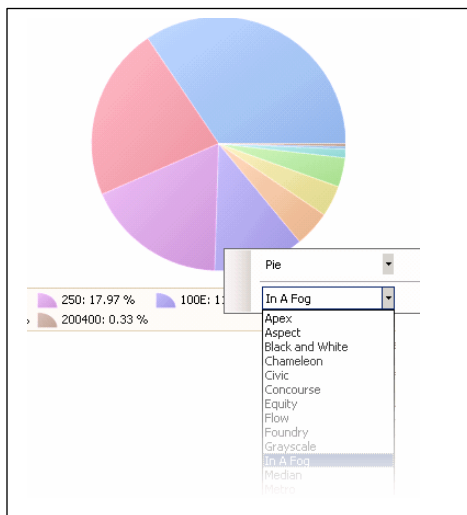
## Chart Options

To view the window data as a chart, click on the Chart toggle button (  ). The data will appear in a chart.

To change the type of chart in the window, right-click on the chart. The first drop-down list in the fly-out menu is the chart type. Select a chart type.



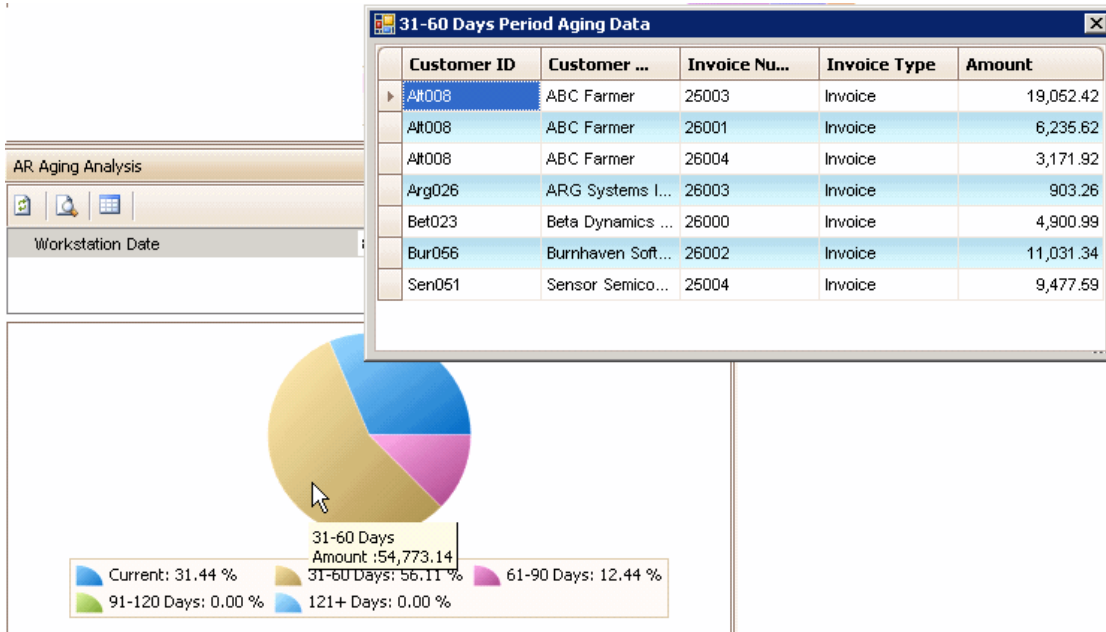
The second drop-down list is the palette for the chart. The palette changes the chart coloring.




Move the cursor over the data areas of a chart to see the data values in a tool tip.

### View Chart Source Details


Some of the views allow you to drill into the chart source detail. To see details behind a data point on a chart, click on the data point. A detail pop-up window will appear.





### Chart and Grid Options

Use the **Expand** toggle button (  ) to show overall data parameters for the selected chart/grid. You can change these parameters.

Vendor ID	Vendor Name	Total Purchases
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Com002	Commuciation Programming ...	101,752.37
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EIS100	EIS	2,848.83
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Mic006	Micro Processors Ltd.	99,781.54
Mod011	Modems Plus	51,790.44
PCB009	PC Builders	36,249.50
Rem014	Remote Power Supply Inc.	9,683.64

After you change any parameters, click the **Refresh** button (  ) to refresh the chart/grid data using the edited parameters.

Click the **Collapse** toggle button (  ) to close the parameters.

**NOTE:** The time in the upper right corner of each chart or grid window is the time at which the data was current. The Dashboard does not update in real-time. To see the most current data, click the **Refresh** button (  ).