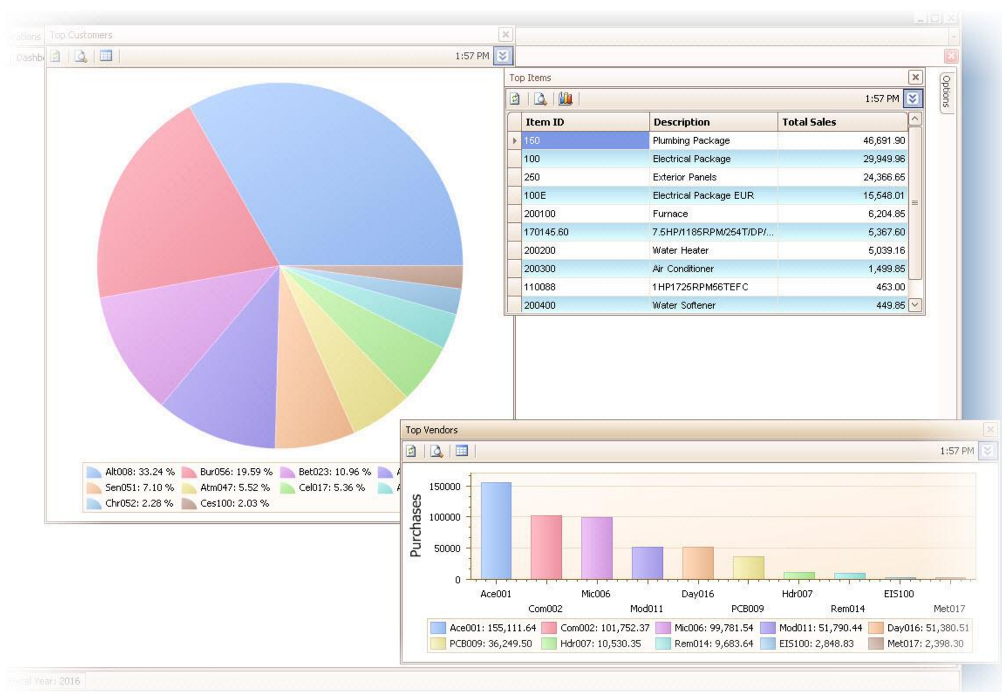
Dashboard Tutorial

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

Knowledge Base Article

TRAVERSE v11.2 Edition



Contents

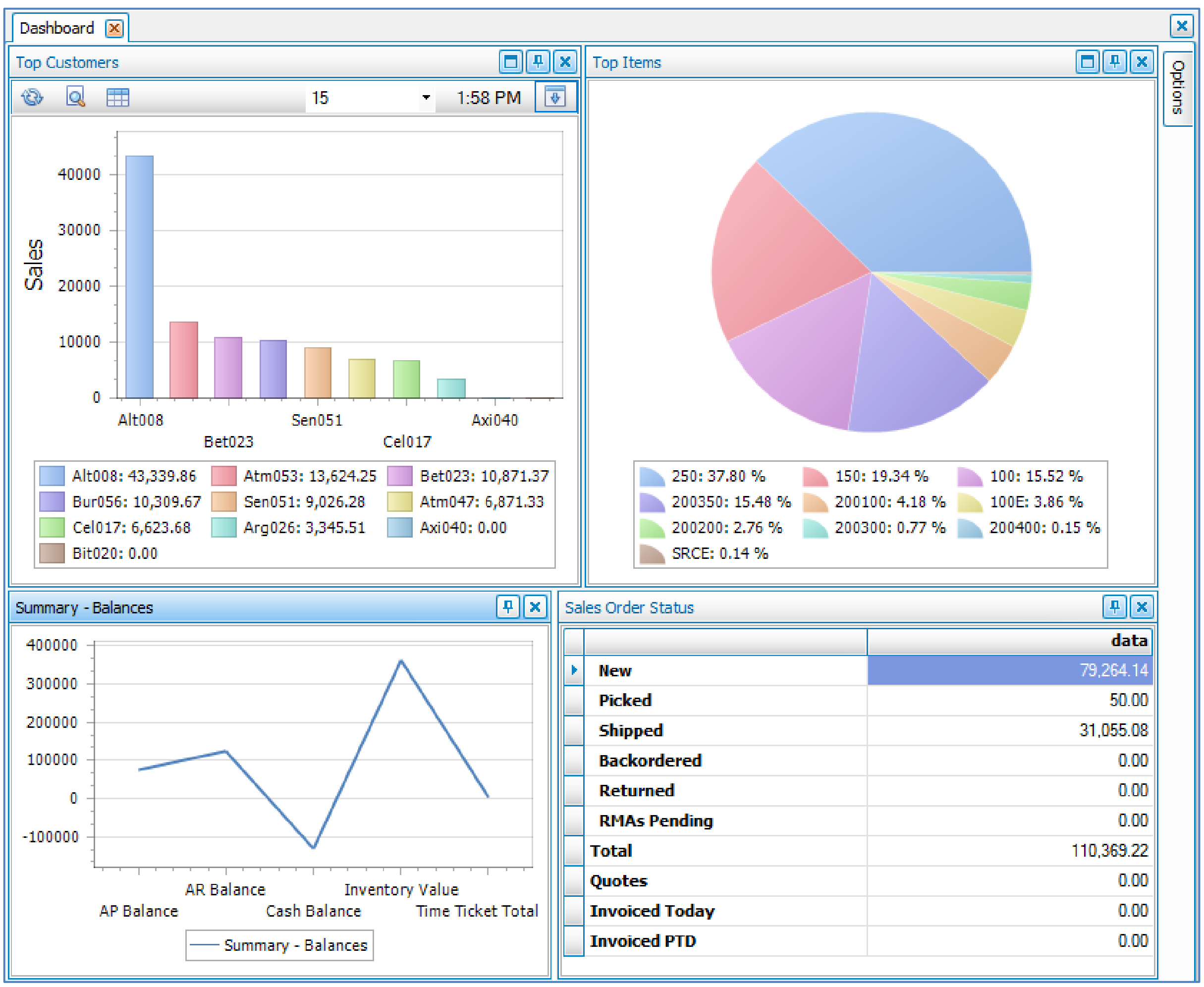
This document describes the intended features and technology for TRAVERSE version 11.2 as of August 2019. Features and technology are subject to change and there is no guarantee that any particular feature or technology described in this presentation will be present in this or subsequent versions of TRAVERSE.

August 2019

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.

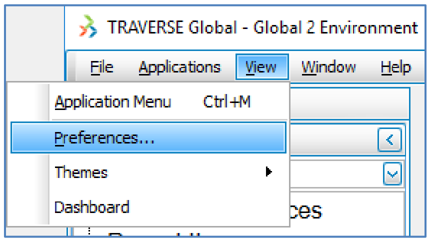
When discussing the Dashboard and its components, each chart or graph is referred to as an *object, tile,* or *object tile*. Objects allow you to view business data.



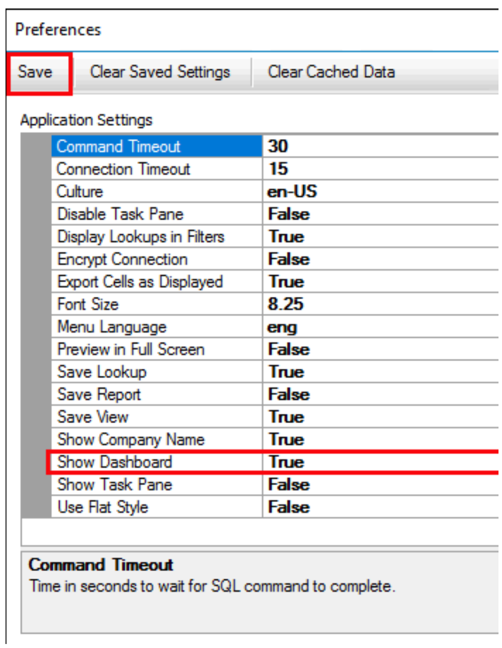
Accessing the Dashboard

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...**

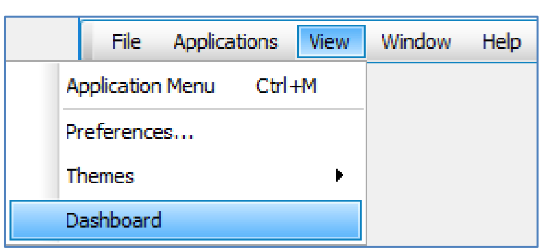


The Preferences window will appear. To allow the Dashboard to display, select **True** for the **Show Dashboard** option, then click **Save** to save your changes.



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

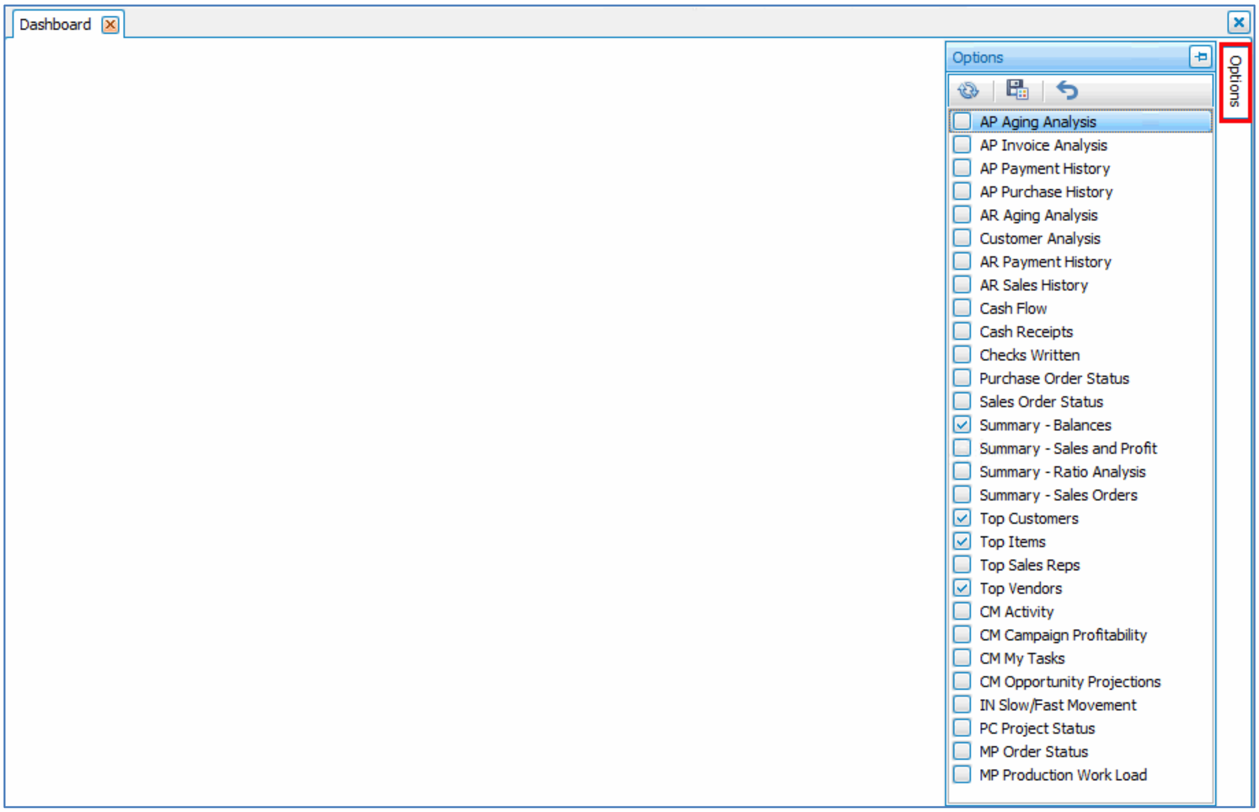
To show the Dashboard, click **View** on the menu bar, then select **Dashboard**.



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.



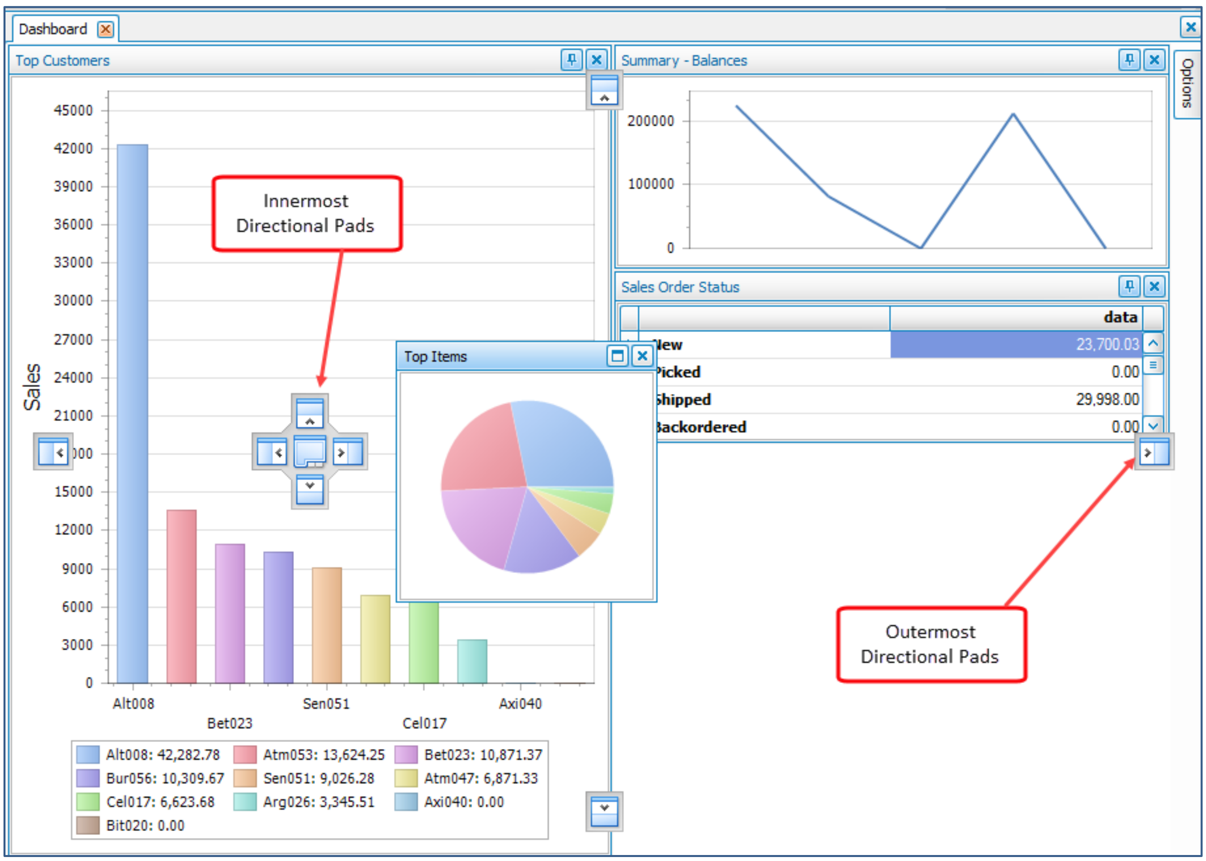
- Mark the objects you would like to appear on the Dashboard. Once you have selected the objects for your Dashboard, click the **Refresh** button ( ) on the Options menu.
- Save the current dashboard screen by clicking the **Save Layout** button ( ) on the Options menu.
- If you reorganize the dashboard, 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.

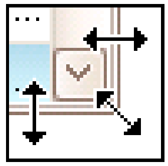


Dropping the window on the innermost directional pad will place the window in the available space, not interfering with the other windows.

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

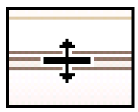
Resizing the Dashboard Windows

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 drop the edge.

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



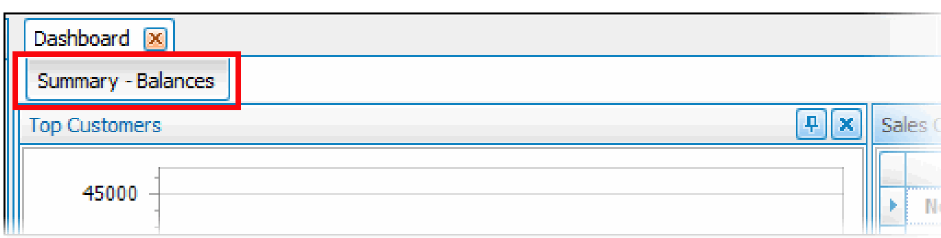
Click and drag the edge to the desired size, then drop the edge.

Pinning the Dashboard Windows

You can also pin or unpin the dashboard windows to the Dashboard tab. This allows you to keep the window available, but either visible or "hidden" (minimized).

Click on the **Unpin** button ( ) to unpin the window. The window remains available, but "hidden".

You can expand or "show" the window by clicking it.



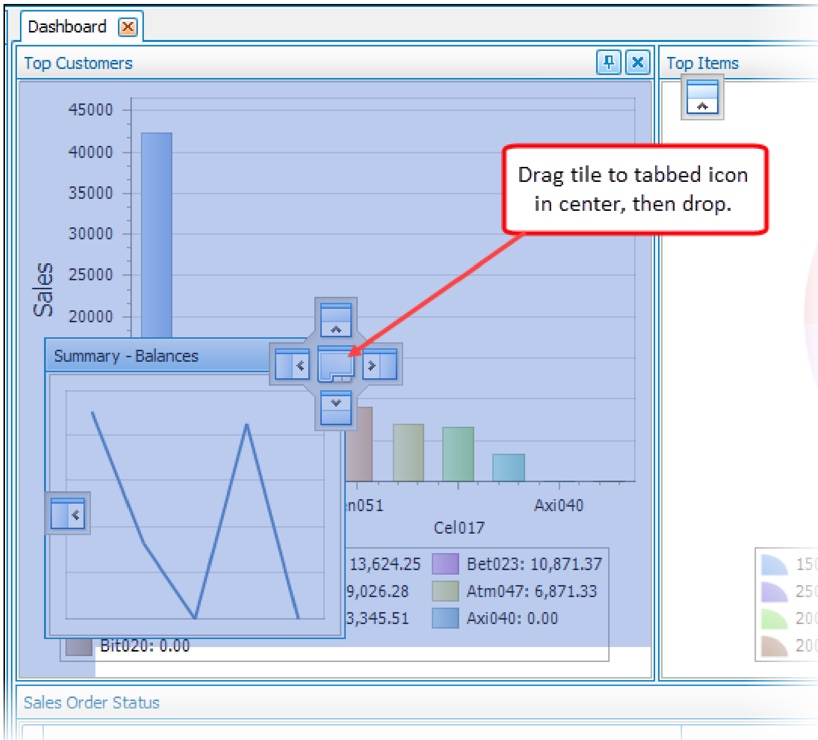
"Hide" the window again by clicking on another window.

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

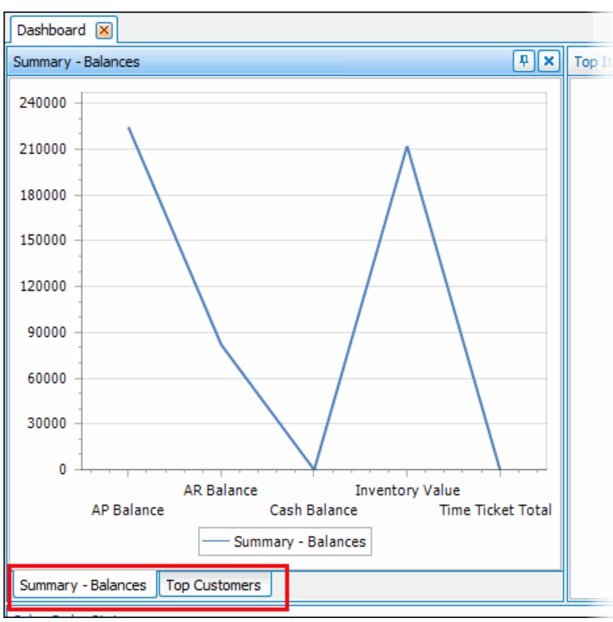
Setting the Dashboard Windows as Tabs

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.



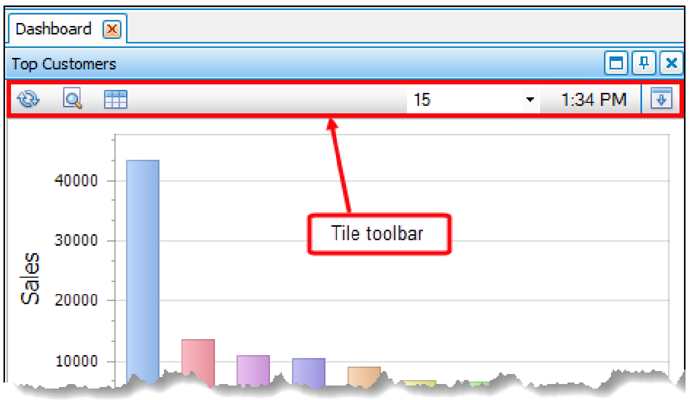
The window is now a tab. To return the tab to a floating window, click and drag the tab for the window.



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.

Each tile has a toolbar that automatically hides when not in use. To show the toolbar, hover the mouse pointer at the bottom edge of the title bar of the tile. The toolbar should appear.



Use the **Expand** toggle button ( ) to pin the toolbar in place.

Grid Options

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

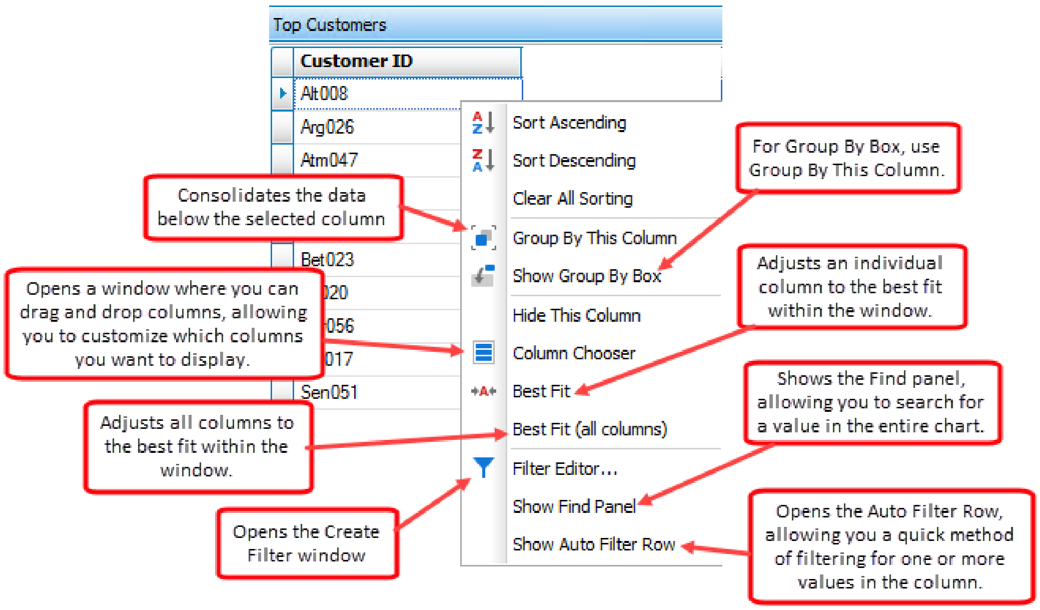
Top Customers

Customer ID	Customer Name	Total Sales	Total Profit
Alt008	Altos Servers Company	42,282.78	15,299.69
Atm053	ATM Switches Inc.	13,624.25	6,551.68
Bet023	Beta Dynamics Inc.	10,871.37	4,126.90
Bur056	Burnhaven Software Design	10,309.67	3,829.66
Sen051	Sensor Semiconductor	9,026.28	3,337.93
Atm047	Asynchronous Networking ...	6,871.33	2,971.60
Cel017	Celebris Systems	6,623.68	1,979.51
Arg026	ARG Systems Inc.	3,345.51	1,033.70
Axi040	Axis Electronics	0.00	0.00
Bit020	Bitstream Technololgy	0.00	0.00

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:



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

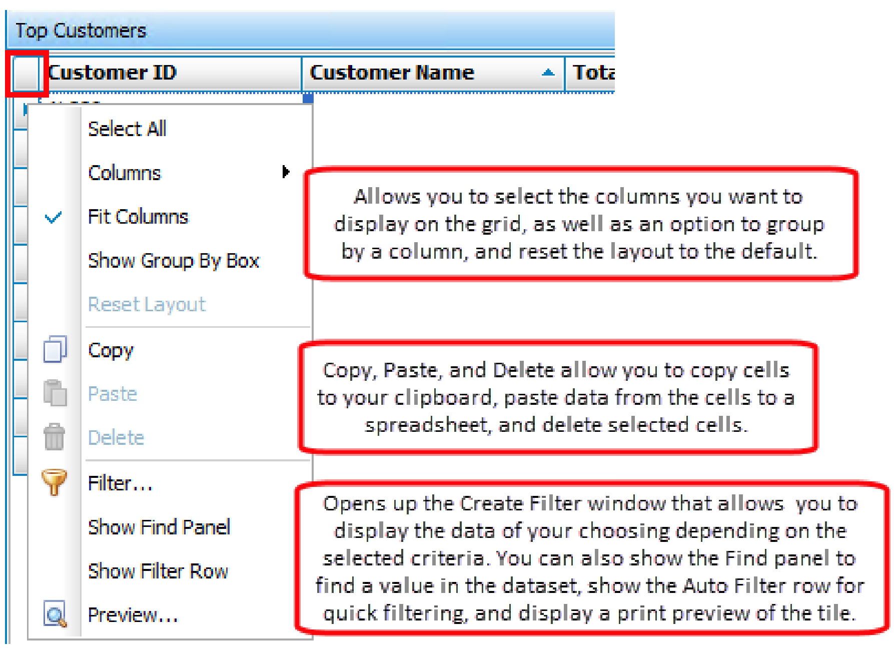
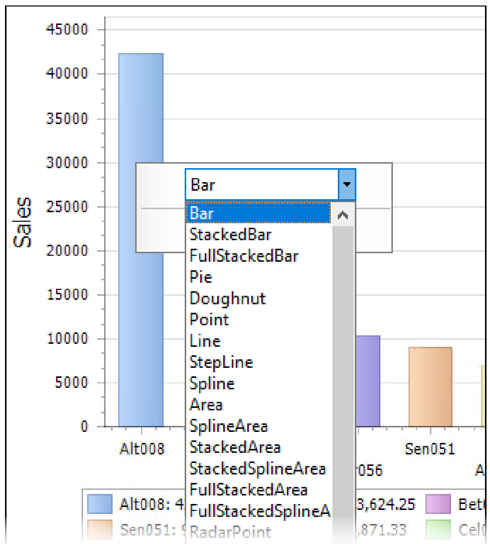


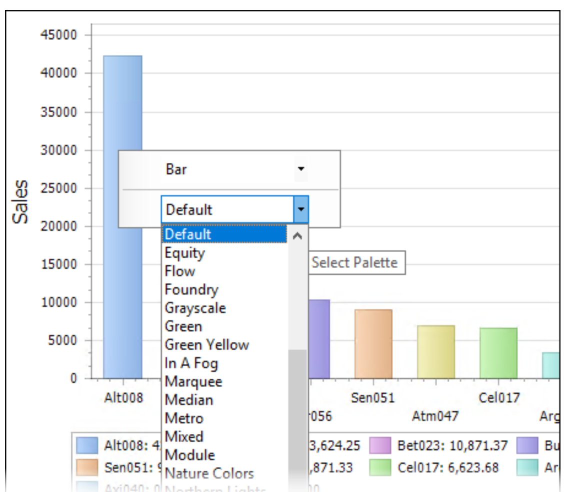
Chart Options

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.



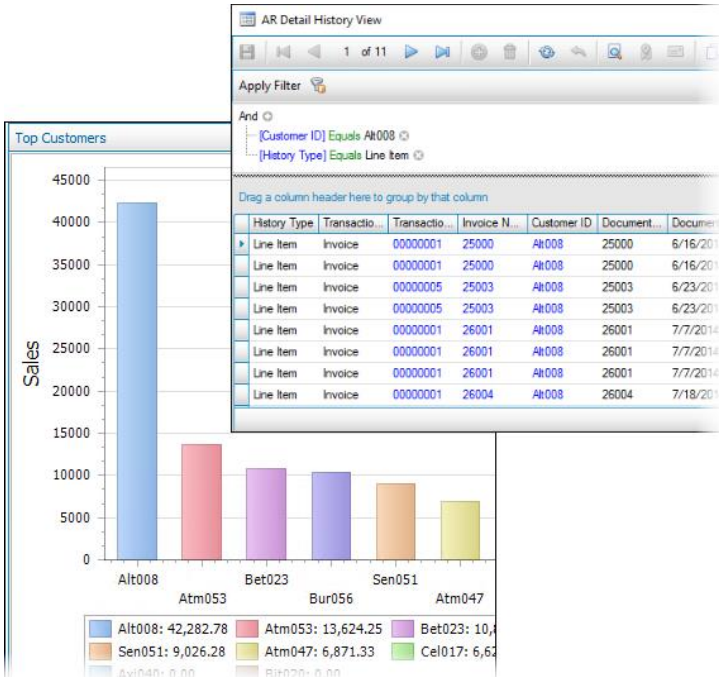
The second drop-down list is the palette for the chart. The palette changes the chart coloring.



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 (tabbed) window will appear, showing the data details. **Hint:** to create a floating window, select the option from the Window menu on the menubar.



If there are drill-down links in blue, you can double-click the links to open a read-only view of the data. In the screenshot above, double-clicking on the **Transaction ID** will open the AR Transaction History Information View for that transaction. Likewise, double-clicking on the **Customer ID** will open a read-only Customer Information screen.

When you click on the data point, an interactive view may open, such as the IN Summary History View when clicking on a data point in the Top Items dashboard object. The interactive view filter will ensure only records that meet the data point criteria are displayed.

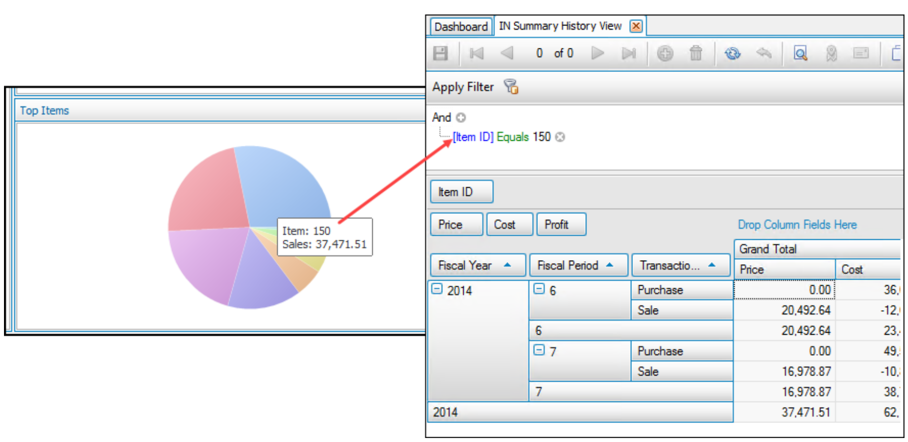
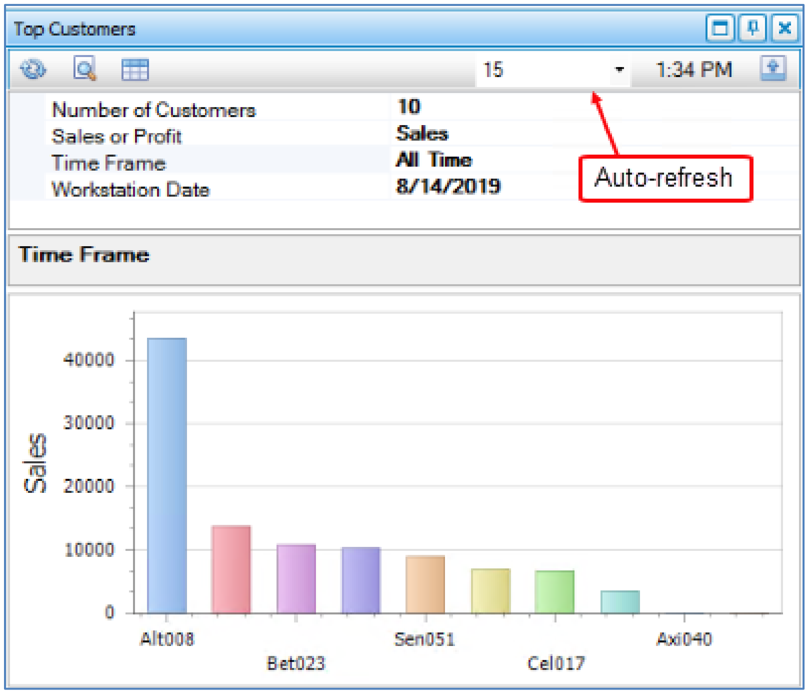


Chart and Grid Options

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



After you change any parameters, click the **Refresh** button ( ) to manually refresh the chart/grid data using the edited parameters. The time in the upper right corner of each chart or grid window is the time at which the data was current. To see the most current data, click the **Refresh** button ( ). The dashboard does not update in real-time when the Auto-refresh is set to **None**.

Use the **Auto-refresh** option to configure the dashboard to automatically query the data at a selected interval. The interval can be set individually for each chart/grid. Note that using an auto-refresh interval that is too short may impact the performance of the system depending on the number of dashboard components, volume of data, and the complexity of the data transformation.

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