



Expanded Dashboard Functionality

Quick Guide

Version 24.x
Last Modified 24.0 | March 2024

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Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

The support website can be used to open issues, subscribe to user groups, and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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Overview

Dashboard functionality has been expanded to allow the following:

- Role-based dashboards
- Better display and navigation when viewing dashboards

1. Edit Dashboard Page

SAVE UNDO REFRESH DELETE FIND RELATED ▾

Edit Dashboard Page

Edit Dashboard

User/Role: Dashboard Name: ▾ Create New Dashboard

(Loaded 0 records)

| KPI | Disabled | Title | Scale Minimum | Scale Maximum | Alarm Level | Alarm When | Alarm Size | Chart Type | Sql Values |
|-----|----------|-------|---------------|---------------|-------------|------------|------------|------------|------------|
|-----|----------|-------|---------------|---------------|-------------|------------|------------|------------|------------|

Action Required

This field supports multiple "List of Values".
Please select the desired format.

1 - [Application User](#)
2 - [Role](#)

Cancel

The Edit Dashboard Page now allows you to set up dashboards at the **role** or **application user** level.

1. You can either enter the application username or role name in the **User/Role** field or you can double-click in the field to select from the list of values.
2. Select the **Create New Dashboard** button. Alternatively, you can view an existing dashboard (if any exist) by selecting one from the **Dashboard Name** dropdown menu.
3. You will be prompted to enter a dashboard name. Enter the name and select **OK**.

4. You can add and configure specific KPIs as normal.
5. To disable any KPIs for existing dashboards, select the Disabled checkbox.
6. When finished making changes or adding KPIs, select the **SAVE** button.

2. Application User Maintenance

Application User Maintenance

Application User Information

Application User: JOHN.SMITH

Disabled: No

☒ Allow Web Access:

Password: *****

Password Expire (days): 120

User can change password: ☒

Force password change next login: ☐

☒ Allow Mobile Access:

Password: *****

Adhoc Access: Report Admin

Adhoc Starting Folder:

Account Expiration Date:

User Role: MECH

User Based Dashboard: ☒

Idle Timeout Minutes:

Crystal Enterprise User:

Pooled: ☐

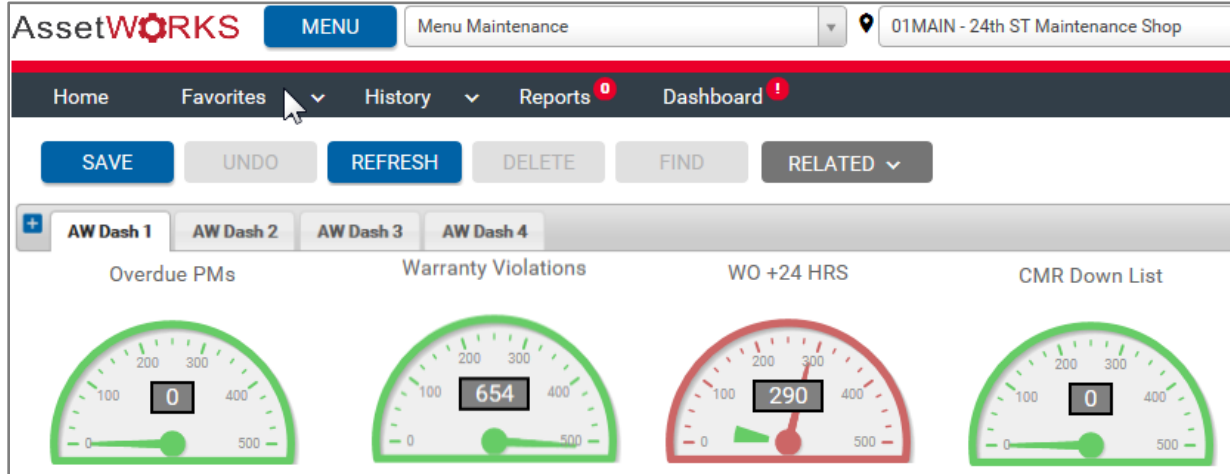
Crystal Enterprise Password: *****

On **Application User Maintenance** there is a checkbox called **User Based Dashboard**. Selecting this checkbox populates a column on the USER_APP table that indicates to M5 that the Dashboard link in the Header Ribbon should use dashboards set up at the user level for that application user, rather than the role level.



If the checkbox is not selected, the role's dashboard will take precedence.

3. Operational Dashboard



The Operational Dashboard page allows for a tab-based structure with a 4 x 4 grid for each dashboard created (for either a Role or User-based dashboard). Each tab can hold only one Dashboard set, with a maximum of 16 controls. This functionality is controlled by an **M5_PARAMS** value and the preferences on the **User Profile**.

- ⚠ Users will default to the Dashboard Style as listed in the M5_PARAMS value USERPREF_DASHBOARD_GRID. If it is set to Y, then all users will have the grid functionality by default unless overridden on their profile settings.
- ⚠ The user profile setting is **Dashboard Grid** and the options are either **On** or **Off**.

With the profile setting Dashboard Grid set to On, selecting the Dashboard link in the Header Ribbon calls a new Operational Dashboard frame (shown above) with a tab layout that displays a separate tab for each dashboard set up for an Application User (User-based Dashboards) or by Role (Role-based Dashboards).

⚠ You can add a maximum of eight different dashboards, each with 16 KPIs.

❗ This is not recommended as that much information can use a lot of memory to retrieve on every bin scan, causing M5 to become sluggish.

If you have more than eight dashboards set up prior to turning on grid functionality, you will receive an error message informing you that you can only use the grid functionality if you have eight or less individual dashboards set up.

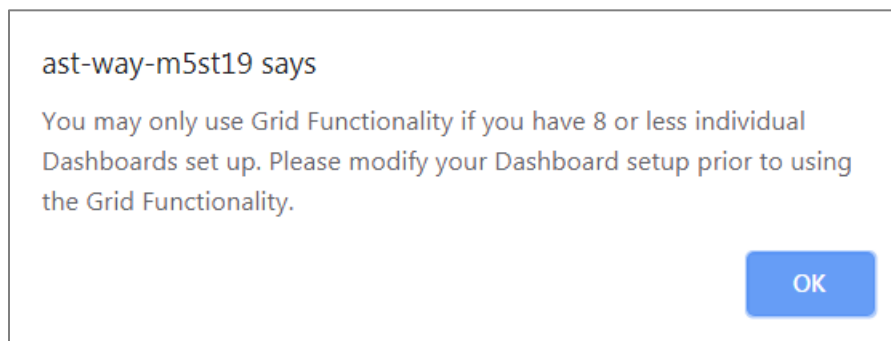


Figure 1: Error Message on User Profile

In order to use the functionality, you must modify the dashboards to conform to the system requirements for grid functionality.

If the USERPREF_DASHBOARD_GRID value is set to Y on the M5_PARAMS table, you have not modified the value through your profile settings, and you have more than eight dashboards set up, when selecting the Dashboard link in the Button Bar, you will receive the same message. You cannot access your dashboards from the button bar until you have reduced the number of dashboards to four or less.

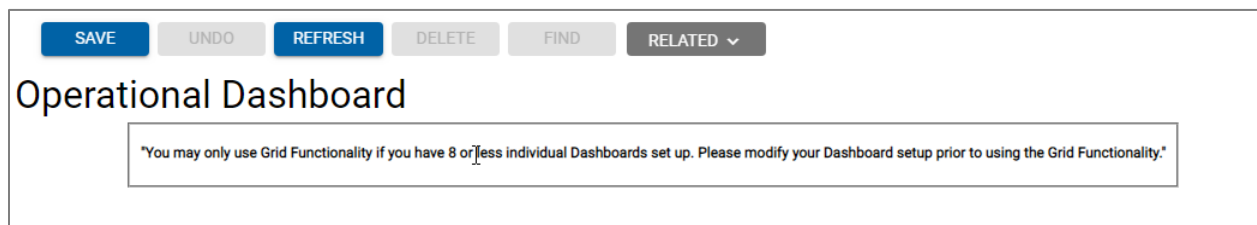
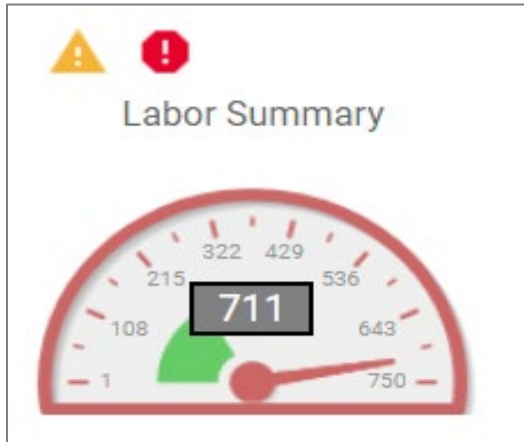


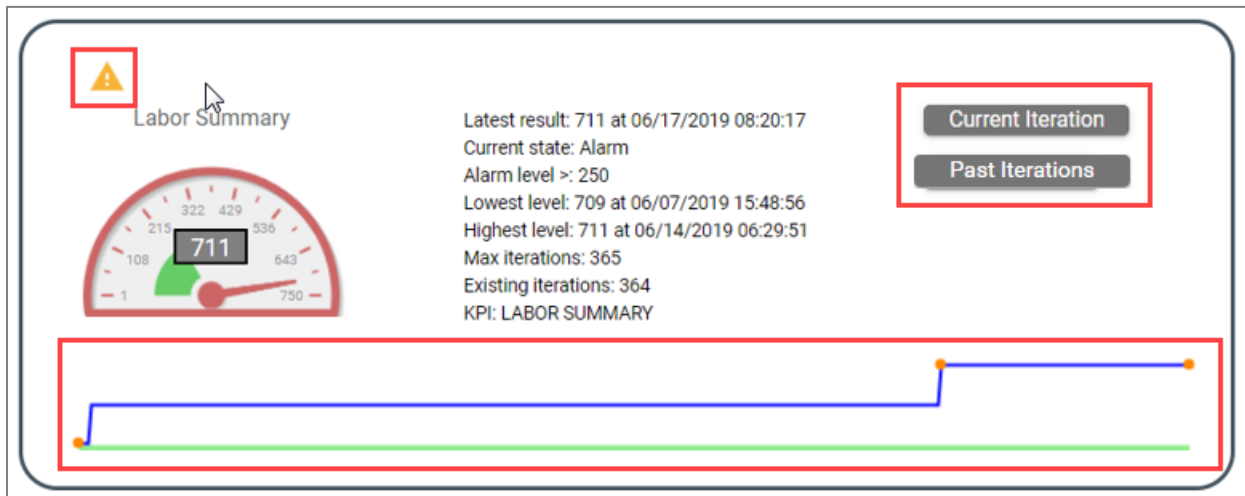
Figure 2: Error Message on Operational Dashboard

4. Additional Display Features

KPIs in an alarm state will generate a yellow triangle warning symbol (▲) in the title of the Dashboard's tab to the right of the title. Also, the gauge displayed in the grid will now display the Alarm icon and SQL Error icon (red stop sign) above the gauge in the grid.



Selecting an individual KPI loads a new browser window with that KPI's information only and the KPI displays with the Alarm and/or SQL Error icon above the gauge image.



There are two buttons to the right of the Results Detail labeled Current Iteration and Past Iterations. Selecting the Current Iteration button returns the latest iteration's results. Selecting the Past Iterations launches an LOV-type pop-up that allows you to choose a specific iteration.

The sparkline image has been improved to give you the ability to visualize past iterations more clearly.

Updates

| Release | Section | Description |
|---------|--------------|--|
| 23.2 | All sections | Applied miscellaneous writing style updates throughout the document. |
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