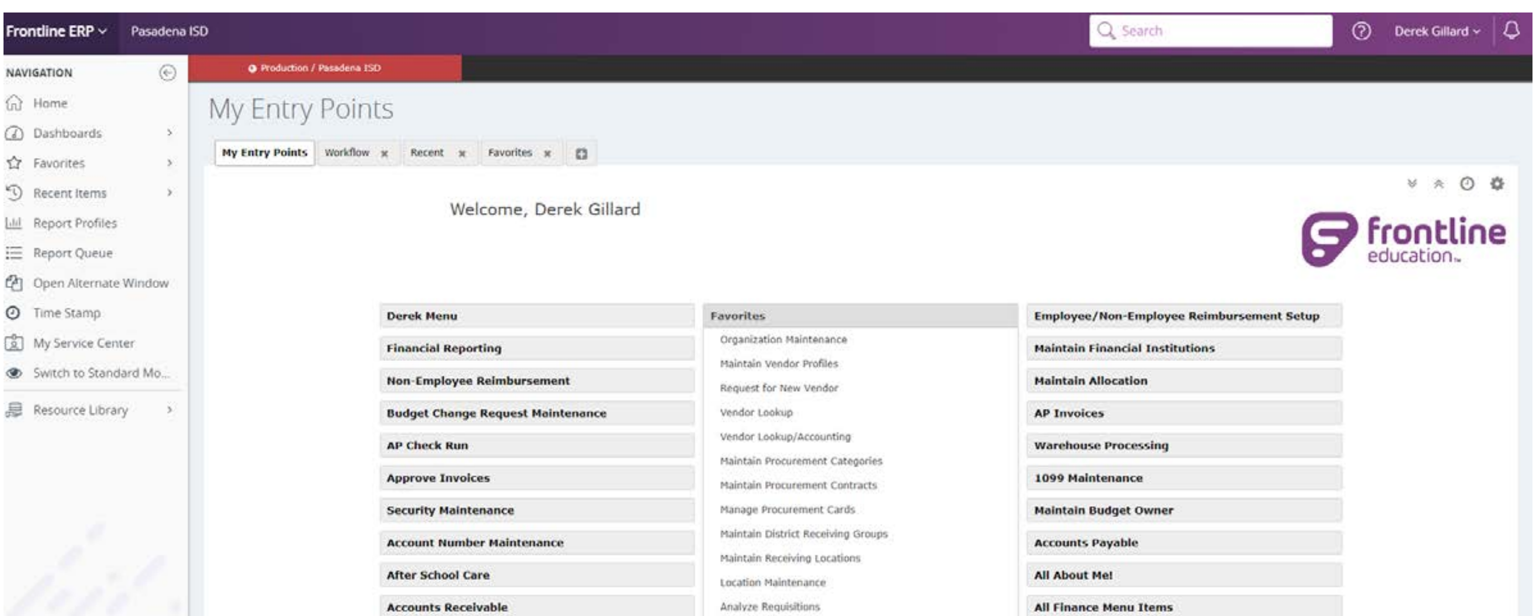
	FRONTLINE PROCEDURES Pasadena ISD	ENTRY POINT: **Dashboards**
DATE DEVELOPED: 08/10/2021	REVISED DATE:	
SUBJECT: Dashboards		

Using Dashboards

Dashboards are configurable screens you will use to interact with ERP entry points and data. ERP provides one dashboard, My Entry Points. You can create and configure your own dashboards, like the one in the example below. You can set a dashboard as your landing page, and you can view any dashboard by clicking its corresponding tab.

If there are more dashboards than your browser window can display at the same time, you will see a ••• tab on the far right. Click that tab to view a menu of other dashboards not currently shown in your browser window. Click a dashboard name to view it; it will replace whichever tab is on the far right, and the tab it replaces will go into the ••• menu.



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Using the My Entry Points Dashboard

The My Entry Points dashboard lists all entry points to which you have access, organized by menu. To locate a specific entry point, expand its menu or type its name into the Search bar. If the My Entry Points dashboard is set up with 50 entry points or fewer, all menus are expanded by default so you can see all entry points.

The My Entry Points dashboard is your default landing page. You can change use the Config menu in any custom dashboard to set it as your landing page.

> Your district administrator creates the menus and allows access to entry points. If you need access to particular entry points, contact your district administrator.

The My Entry Points dashboard contains basic control icons for the dashboard. All controls except Return to Top appear in the upper-right corner of the dashboard; Return to Top appears in the lower-right corner. These icons and their functions are shown in the table below.

	Expand all menus on the page
	Collapse all menus on the page.
	Enter a time stamp if your district uses this functionality. If you have questions about how time stamps are used at your district, contact your district administrator.
	View the Configure My Entry Points page, which can be used to customize the display of the My Entry Points dashboard. See Configuring the My Entry Points Dashboard.
	Return to the top of the dashboard. This icon appears in the lower right corner of the screen of longer dashboards, when you have scrolled down and can no longer see the top of the dashboard. This feature also appears on other ERP pages.

Configuring the My Entry Points Dashboard

On the Configure My Entry Points page, you can create custom menus of entry points or reports. You can show, hide, and reorder custom menus. These custom menus will appear on the My Entry Points dashboard and on the Favorites menu on the Workbench.

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Creating Custom Menus

On the Configure My Entry Points page:

- Click the **My Menus** link in the left panel, if it is not already selected.
- Enter the **Name** for the new menu.
- Select the menu **Type**, which will determine whether it contains *Entry Points* or *Reports*.

Custom menus can only include reports *or* entry points, not a combination of both.

- Select whether the menu will be **Expanded** by default when the dashboard appears.
- Select one or more entry points (or reports) from the **Available Menu Items** list and click the **Add** button.
  - Reorder the items in the Existing Menu Items list by clicking them and then clicking the  and  buttons.
- Click the **Save** button to add the menu to your My Entry Points dashboard.

Hiding and Showing Menus

On the Configure My Home Page:

- Click the **Hide/Display Menus** link in the left panel, if it is not already selected.
- For each entry point on the list, select either the **Hide** box or the **Show** box.

Hiding an entry point does not deny you access to it. The entry point can be unhidden via this same process, or it can be added to a custom menu.

- Click the **Save** button to save your menu configuration.

Reordering Your Custom Menus

- Click the **Reorder My Menus** link in the left panel, if it is not already selected.

- Reorder the menus in the **Menu** list as needed by clicking them and then clicking the and buttons.
- Click the **Save** button to save the configuration of your custom menus.

Creating Custom Dashboards

In addition to customizing the My Entry Points dashboard, you can create your own custom dashboards containing reports, workflows, external web pages, images, ERP menu, or links to external sites. To create a custom dashboard:

- Click the tab to create a new blank dashboard. The system will walk you through the process of creating the first container on this new dashboard.
- Enter a **Title** for the container you are adding to the new dashboard.
- Select the container **Type** to add to the section: *Report*, *Workflow*, *Web Page*, *Image*, *Menu*, or *Link to External Site*. See Dashboard Containers.
- Make the selections that appear when you select a Type. For example, if you select *Report* as your Type, you must also select the **Report** name and **Report Profile**.
- Click the **OK** button to add the container to your dashboard.
- As desired, click the button to add more containers on your dashboard through the Configure window. Repeat steps 2 through 5 to add more containers to your dashboard. You can also add or remove containers after the dashboard is created.
- A custom dashboard can hold up to ten containers.

Any custom dashboard you create is only visible to you. It will not be viewable by any other user.

Once you have created a dashboard, you can rename it and reorder it relative to other dashboards. See Managing Dashboards.

You can resize and move containers relative to other containers on a dashboard. See Managing Dashboard Containers.

Dashboard Containers

Each container can display one of these types of information:

- Report
- Workflow
- Web Page
- Image
- ERP Menu
- Link to External Site

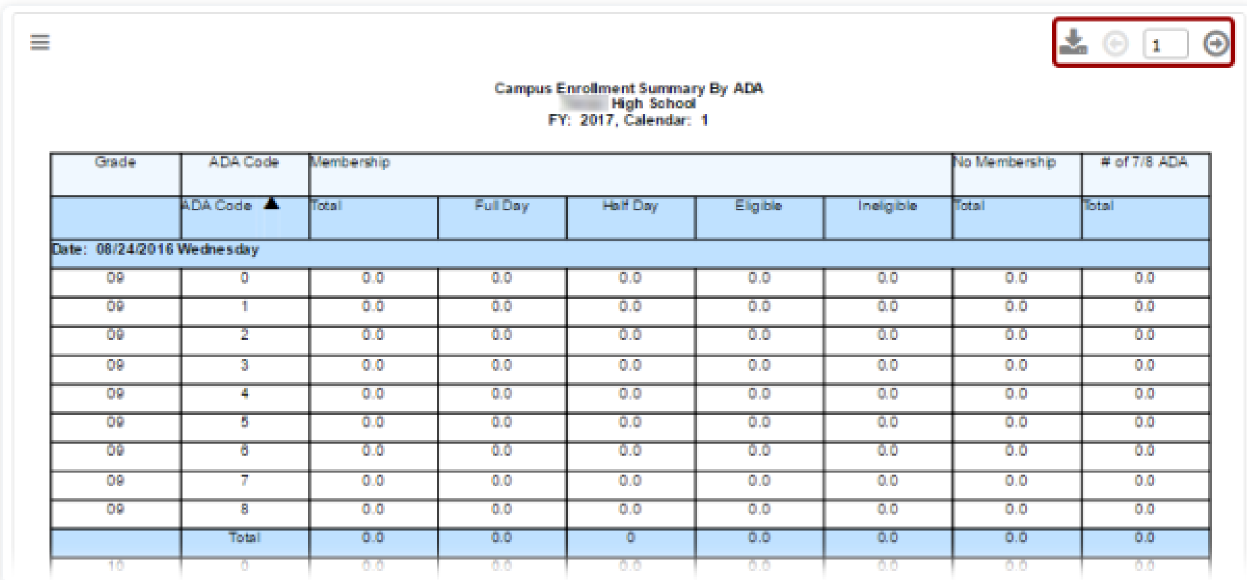
Report

- When you select Report, you are prompted for the **Report** and **Report Profile**. Only Dashboardable reports appear in the list of reports.
- As you make your selections, the parameter values are shown. Make selections for each parameter as needed.
- Click the **OK** button to add the report to the dashboard.

You can only add reports to a dashboard if you have also added a profile for the report. If you want to add a report to a dashboard and you have not yet added a profile, you can do so in My Report Profiles.

Report Functions

- On some reports, you can drill down to view details on some reports by clicking the data in the report, and return to the top level of the report afterward.
- You can page through the report using the and icons, if the report has been set up to use them.
- You can download the report as a PDF or Excel document by clicking the icon.



Campus Enrollment Summary By ADA
High School
FY: 2017, Calendar: 1

Grade	ADA Code	Membership					No Membership	# of 7/8 ADA
	ADA Code	Total	Full Day	Half Day	Eligible	Ineligible	Total	Total
Date: 08/24/2016 Wednesday								
09	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
09	1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
09	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
09	3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
09	4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
09	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
09	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
09	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
09	8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Total	0.0	0.0	0	0.0	0.0	0.0	0.0
10	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Workflow

When you select Workflow, you are prompted for the Workflow Type.

- Select "*Summary*" to add a list of the workflows for which you have requests awaiting your approval. Each workflow will show the number of requests. If there are more than 10 requests, the dashboard shows *10 or more* instead of the exact number. You can click an item in the list to go to the entry point corresponding to the workflow.

- Select "*Individual*" to add a table of requests awaiting your approval for a single workflow. You are prompted to select the Workflow. You will only see the dashboardable workflows for which you are an approver. Some workflows are not dashboardable. From the table, you can perform regular workflow tasks, such as approving and denying requests.

- Select "*All*" to add a table of all requests awaiting your approval, organized by Workflow. From the table, you can perform regular workflow tasks, such as approving and denying requests.

Make your selections and click the **OK** button to add the workflow to the dashboard.

A workflow table on a dashboard (Individual or All) will show up to 100 records. If there are more than 100 records in a workflow and you wish to work with them, use the relevant entry point for the workflow.

Web Page

When you select Web Page, you are prompted for the page's URL. Enter the URL and click the **OK** button to add the page to the dashboard.

Restrictions

- You can only add URLs that start with https (HTTP Secure). For example, you could add Google Sheets, because its URL starts with *https://docs.google.com/spreadsheets*. If a site does not use https, it cannot be added to a dashboard, because it does not meet the browser security standard for ERP.
- Some sites have their pages set up to prevent embedding. You can only add sites that allow embedding.
- Your district may also limit access to certain links.

Websites added to containers are not part of ERP. A website operating inside a container may not function as expected, depending on how the website was designed.

Image

When you select Image, you are prompted for the image's URL. Enter the URL and click the **OK** button to add the image to the dashboard. Images are not hyperlinked.

Like web pages, your district may limit access to certain links to images, but the URL for the image is not required to start with https.

Menu

When you select Menu, you are prompted to select Entry Points Menus.

- Select "*Individual*", then select a **Menu** to add a list of entry points that belong to an existing ERP menu, such as *Benefits* or *Student Management*.
- Select "*Favorites*" to add your favorites menu.
- Select "*Recent*" to add a list of the 15 entry points you have visited most recently. This list will update as you visit other entry points.
- Select "*All*" to add a list of all TEAMS entry points to which you have access.

Click the **OK** button to add the entry point menu to the dashboard. From the menu you have added, you can click entry point names to access entry points.

Link to External Site

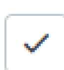
When you select Link to External Site, you are prompted to select a **Site**. Click the **OK** button to add your selected site to the dashboard.

Your district administrator uses the Maintain Links to External Sites entry point to set up the sites available through this option.

Managing Dashboards

You can reorder dashboards by clicking a tab and dragging it before or after other tabs.

You can delete a dashboard by clicking the  next to the dashboard name on the tab and answering *Yes* to the confirmation message.

You can rename the current dashboard by double-clicking its tab and editing the dashboard name. Click the  to confirm the new name, or click the  to keep the current name.

You can configure the dashboard by clicking the to access the Configure Dashboard window. From this window you can rename the dashboard, set it to automatically refresh the data it contains (if applicable) and set the dashboard as your default landing page.

If you have added more dashboards than your browser window can display at the same, time, you will see a tab on the far right. Click that tab to view a menu of other dashboards not currently shown in your browser window. Click a dashboard name to display it.

Managing Dashboard Containers

You can move a container on a dashboard by clicking it and dragging it to another location relative to the other containers.

Using the menu on a dashboard container, you can:

- Change the **Config** of the container. You can change its title and its type, converting it into a different container altogether, if desired.
- **Refresh** the data appearing on the container.
- **Delete** the container from the dashboard.

Depending upon the type of container, other actions may be available.