



## Dashboard Training Guide

This training tutorial focuses on the Work and Admin Dashboard basics in MicroMain Maintenance accessed through the **Dashboard**.

**Work Dashboard:** This Work-centric board, available to all Maintenance users, facilitates work order completion and backlog analysis by providing the right data at the right scope. At-a-glance insight into the volume and content of work through panels can be filtered at the Property, Building, Shop, and Labor levels with a single user action.

**Admin Dashboard:** Users with Maintenance Reports permissions can leverage this configurable display to illuminate diverse aspects of the maintenance function such as cost and efficiency, make useful comparisons across the organization, track performance over time, and stay mindful of essential metrics. Individual panels offer their own filters and options, allowing side-by-side visualization of both organization-wide and on-the-ground realities.



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The following topics are included in this training guide:

### Dashboards

- [Work Dashboard Form Overview](#)
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### Dashboards

You will have access to one or more of the following dashboards while working in Maintenance, based on installation and permissions settings:

- **Maintenance 8.0 Dashboard:** The Maintenance 8.0 Dashboard form may be selected as a user's default Maintenance Management homepage, providing a selection of quick links used to access the most commonly used sections of the application, as well as real-time widgets displaying application summary information. All of this is customizable to the individual to provide user-relevant information. The dashboard also includes a scrolling, real-time system activity log. Users without access to the Advanced Reporting installer will use this dashboard.
- **Work Dashboard:** This Work-centric board, available users with proper permissions, facilitates work order completion and backlog analysis by providing the right data at the right scope. At-a-glance insight into the volume and content of work can be filtered at the Property, Building, Shop, and Labor levels with a single user action.
- **Admin Dashboard:** Users with proper permissions and access to the Advanced Reporting installer can leverage this configurable display to illuminate diverse aspects of



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the maintenance function such as cost and efficiency, make useful comparisons across the organization, track performance over time, and stay mindful of essential metrics. Individual panels offer their own filters and options, allowing side-by-side visualization of both organization-wide and on-the-ground realities.

Access your dashboard by clicking the **Dashboard** button from any tab on the Maintenance menu.

### Work Dashboard Overview

This Work-centric form, available to all Maintenance users (who have the necessary permissions settings, facilitates work order completion and backlog analysis by providing the right data at the right scope. At-a-glance insight into the volume and content of work can be filtered at the Property, Building, Shop, or Labor levels for all panels with a single user action.

**NOTE:** Hold down the CTRL key while scrolling the mouse wheel to zoom in and out on the Work Dashboard form.

From your dashboard, you can add and remove panels, which display on your dashboard. These at-a-glance panels include work order and backlog report information to aid you in work completion and analysis. Name and add tabs to the dashboard to create more panel pages within your dashboard.

Users can access the Work Dashboard using the **Jump To** sidebar when inside Advanced Reporting or Dashboard. This icon, on the upper left hand corner will lead users to **Jump To:**



### Admin Dashboard Overview

Users with Maintenance Reports permissions can leverage the Admin Dashboard to illuminate diverse aspects of the maintenance function such as cost and efficiency, make useful comparisons across the organization, track performance over time, and stay mindful of essential metrics. Individual panels offer their own filters and options, allowing side-by-side visualization of both organization-wide and on-the-ground realities for at-a-glance insights.



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**NOTE:** Hold down the CTRL key while scrolling the mouse wheel to zoom in and out on the Admin Dashboard form.

There are two ways to open the Admin Dashboard:

- Click the **Dashboard** button from any Maintenance Menu tab.
- From Work Dashboard or Advanced Reporting, use the **Jump To** sidebar to navigate.

### Panel Form Overview

From your Work or Admin Dashboard, you can add, remove, move, rename, resize, and filter panels, which display on your dashboard. These at-a-glance panels include:

**Work Dashboard:** Work order and backlog report information to aid you in work completion and analysis. Use the global Filters below the Navigation toolbar (Property, Building, Shop, Labor, Date Selection, Start Date, End Date) to filter all of your panels at once. Additional panel filtering is done through the Filter icon on specified panels.

**Admin Dashboard:** Diverse aspects of the maintenance function such as cost and efficiency, useful comparisons that can be made across the organization, tracking of performance over time, and essential metrics. Individual panels offer their own filters and options, allowing side-by-side visualization of both organization-wide and on-the-ground realities. Add Chart, Crosstab, and Table panels you create through Analysis Grids (in the Report Center).

Name and add tabs to the dashboard to create more panel pages within your dashboard.

Panel forms display in the area just below the currently open Tab.

### Add Panels Form Overview

The Add Panels form displays a list of panels by title. Click the Add button next to each panel you want to add to your Work or Admin Dashboard tab. Panels with no Add buttons mean they are already displayed on your dashboard.

There are three ways to open the Add Panels form:



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- Initially, when you open your dashboard, the Add Panels form will automatically display.
- Through the Add Tab icon on your dashboard. Click it to create a new tab and automatically open the Add Panels form.
- Click Add Panels on the Tab Gear on the currently open tab.

### Adding, Renaming, Removing, Resizing, and Moving Dashboard Panels

You can add, rename, remove, resize, and move dashboard panels in the Work and Admin dashboards.

#### Adding a Panel

You can add a panel to the Work or Admin dashboard.

If you need to add a panel to an existing tab page on your dashboard:

1. From your dashboard's currently open tab, click the Tab Gear icon .
2. Click Add Panels.
3. Choose which panels you want to display from the Add Panels list by clicking the Add button next to each panel (panels with no Add button are already displayed on your dashboard).
4. Click Done.

If you need to create a new tab and add panels to its page:

1. From your dashboard, click on the Add Tab icon. A new tab is created and the Add Panels form displays.
2. Choose which panels you want to display from the Add Panels list by clicking the Add button next to each panel.
3. Click Done.

#### Renaming a Panel

To rename the title of a panel on the Work or Admin dashboard:

1. From your dashboard, click on the Panel Gear icon of the panel's title you want to change.
2. Click Rename.
3. Enter a name for the panel title in the field.



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4. Click outside of the field to save the new name.

### Removing a Panel

To remove a panel from the Work or Admin dashboard:

1. From your dashboard, click on the Panel Gear icon of the panel you want to remove.
2. Click Remove.
3. Click OK on the confirmation screen to remove the panel from the dashboard.

### Resizing a Panel

To resize a panel on the Work or Admin dashboard:

1. From your dashboard, place your cursor over the bottom half of the panel you wish to resize.
2. The resize icons will display.
3. Click and drag one of the resize icons to resize the panel to the height, length, or size you need.

### Moving a Panel

To move a panel to another location on the Work or Admin dashboard:

1. From your dashboard, click the top portion of the panel you wish to move to change the cursor to double arrows.
2. Click and drag the panel to move it to a different location on your dashboard.

### Tabs Overview

From your Work or Admin dashboard, you can add to and remove tabs from your dashboard to create pages of panels within your dashboard for better organization.

The Add Tab icon allows you to create a new tab and add panels to the tab through the Add Panels form. The Tab Gear allows you to add panels, change the layout design of the panels, and rename or remove tabs.



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### Adding, Renaming, and Removing Dashboard Tabs

You can add, rename, and remove dashboard tabs in the Work and Admin dashboards.

#### Adding and Renaming a Tab

To add a tab to the Work or Admin dashboard and rename the tab:

1. From your dashboard, click on the Add Tab icon. A new tab is created and the Add Panels form displays.
2. Choose which panels you want to display from the Add Panels list by clicking the Add button next to each panel.
3. Click Done. The new tab displays with the name **New Tab**.
4. Click the Tab Gear icon to the right of the **New Tab** title on the dashboard.
5. Click Rename Tab.
6. Enter a name for the tab in the field.
7. Click outside of the field to save the new name.

#### Filtering Panels in the Work Dashboard

There are two types of filters you can configure and apply to your panels in the Work Dashboard:

- **Global Filters:** Global filters are located just below the Navigation toolbar on your dashboard. Selecting and applying these filters filter all the panels on your dashboard globally. Global filters include:
  - Property
  - Building
  - Shop
  - Labor
  - Date Selection
  - Start Date
  - End Date
- **Local Filters:** Local filters are located on each panel on your dashboard through the Filter icon. The filter options are specific to each panel type.



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To set Global filters on the Work Dashboard:

1. Choose the desired dropdown list option for each filter you want to apply to the panels.
2. Click Apply. The information in each panel will display according to the filters you have chosen.

To set Local filters:

1. Click the Filter icon on the panel you wish to filter. The filters are specific to the panel type and information.
2. Choose the desired dropdown list option for each filter you want to apply to the panel.
3. Click Done.

### Filtering Panels in the Admin Dashboard

On the Admin Dashboard, individual panels offer their own local filters and options, allowing side-by-side visualization of both organization-wide and on-the-ground realities for at-a-glance insights.

Local filters are located on panels on your Admin dashboard through the Filter icon. The filter options are specific to each panel type.

To set Local filters:

1. Click the Filter icon on the panel you wish to filter. The filters are specific to the panel type and information.
2. Choose the desired dropdown list option for each filter you want to apply to the panel.
3. Click **Done**.