



Dashboard Training Guide

This training tutorial focuses on dashboard basics in MicroMain Maintenance. The dashboard feature 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 customizable to the individual to provide user-relevant information. Quick-links can be selected to provide immediate access to any tab/button combination within the Management program. The dashboard also includes a scrolling, real-time system activity log.

Current widgets include the following:

- Active work orders by status
- Completed work orders by status per period time (Day, Week, Month, All)
- Assigned work orders
- Failed inspection points
- High priority work orders
- Preventive Maintenance work orders

The following topics are included in this training guide:

- [Dashboard Overview](#)
- [Configure Quick-links and Widgets](#)



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Dashboard Overview

The Dashboard can be divided into four primary sections:

- **Quick Links:** A selection of user configurable buttons down the left side of the feature. Six (6) links may be selected, providing direct access to any functional area within the Maintenance Management application.
- **Greeting:** A user based greeting, refresh button, and access to feature options in the upper, right corner of the feature.
- **Widgets:** A user defined selection of four (4) real-time system metrics from a current list of six (6) available, which include:
 - Active Work Orders
 - Assigned Work Orders
 - Completed Work Orders
 - Failed Inspection Point
 - High Priority Work Orders
 - Preventive Maintenance Work Orders
- **A Real-Time System Activity Feed:** This feature auto-refreshes every 60 seconds.

The screenshot shows the MicroMain Dashboard interface. At the top, there is a greeting "Hello, mmdemo37" and buttons for "Refresh" and "Options". The dashboard is divided into several sections:

- Left Sidebar:** "What's New in 8.2" with buttons for "Work Orders", "Schedule", "Batch WO Status", "Projects", "Quick Tickets", and "Customer Surveys".
- Active Work Orders:** Requested 8, Open 5, Past Due 13, Total Requested and Open 13. Includes a "View Work Orders" button.
- Completed Work Orders:** On Time 5, Not On Time 1, Total Completed 6. Includes filters for "All", "Month", "Week", and "Day", and a "View Work Orders" button.
- Assigned Work Orders:** Assigned 2, Unassigned 11, Total Requested and Open 13.
- Preventive Maintenance Work Orders:** Requested 4, Open 1, Hold 0, Total Preventive 5.



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Configure Quick-Links and Widgets

With selective configuring, the dashboard feature may serve as your portal to Maintenance, providing ready access to the areas of the application you use most often, as well as at-a-glance summary information on metrics which concern you.

To customize your quick links and widgets:

1. Select Options in the upper, right corner of the dashboard.

The Set Dashboard Links and Widgets form displays.

Set Maintenance Program Options

<p>User Options</p> <ul style="list-style-type: none"> Action Forms Asset Forms Dashboard Email Settings Facilities Forms Menu and Filters Resources Forms Work Order Defaults Work Order Schedule 	<p>Set Dashboard Links and Widgets</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center;">Dashboard Links</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td>Link 1 Menu</td><td>Actions</td><td>Link 4 Menu</td><td>Resources</td></tr> <tr> <td>Link 1 View</td><td>Work Orders</td><td>Link 4 View</td><td>Parts/Locations</td></tr> <tr> <td>Link 2 Menu</td><td>Actions</td><td>Link 5 Menu</td><td>System Utilities</td></tr> <tr> <td>Link 2 View</td><td>Schedule</td><td>Link 5 View</td><td>Alert Settings</td></tr> <tr> <td>Link 3 Menu</td><td>Resources</td><td>Link 6 Menu</td><td>Administration</td></tr> <tr> <td>Link 3 View</td><td>Staff</td><td>Link 6 View</td><td>Accounts</td></tr> </table> </div> <div style="border: 1px solid gray; padding: 5px;"> <p style="text-align: center;">Dashboard Widgets</p> <table style="width: 100%; border-collapse: collapse;"> <tr><td>Widget 1</td><td>Active Work Orders</td></tr> <tr><td>Widget 2</td><td>Assigned Work Orders</td></tr> <tr><td>Widget 3</td><td>Completed Work Orders</td></tr> <tr><td>Widget 4</td><td>High Priority Work Orders</td></tr> </table> </div>	Link 1 Menu	Actions	Link 4 Menu	Resources	Link 1 View	Work Orders	Link 4 View	Parts/Locations	Link 2 Menu	Actions	Link 5 Menu	System Utilities	Link 2 View	Schedule	Link 5 View	Alert Settings	Link 3 Menu	Resources	Link 6 Menu	Administration	Link 3 View	Staff	Link 6 View	Accounts	Widget 1	Active Work Orders	Widget 2	Assigned Work Orders	Widget 3	Completed Work Orders	Widget 4	High Priority Work Orders
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<p>Global Options</p> <ul style="list-style-type: none"> Calculations Email and SMTP Inspection Reports Purchase Order Reports Work Order Reports Work Orders and Tasks 																																	

Close
Help

Each of the six (6) available Links corresponds to a given Menu and View. The menus correspond to the different tabs of Maintenance.

