



SedonaOffice Users Conference
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Dashboard 2

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PERENNIAL SOFTWARE

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Overview

SedonaDashboard is a real-time, web-based, data visualization and analysis tool that displays the current status of metrics and key performance indicators within SedonaOffice. Each user can individually design their visualizations preferences for their dashboard.

This tool can be run outside of SedonaOffice. At the time of installation, SedonaOffice Support will provide a website address where users may remotely log into their dashboards using their SedonaOffice usercode and password. SedonaDashboard can be run from mobile devices and is compatible with Android phones, iPhones and other types of computing devices. The dashboard may be created for viewing on a computer screen in horizontal format. It may also be created in a vertical format for easy viewing on a mobile device.

Charts and graphs may be drilled into to analyze the totals presented. Some Visualizations may also be drilled through to reach an analysis grid where filtering, sorting, additions of columns, mathematical formulas and additional functions may be used to further analyze data. Analysis grids may be exported into Excel, .csv or .pdf formats.

Requirements

SedonaOffice customers must request the installation of SedonaDashboard from SedonaOffice Support. The system requirements for SedonaDashboard are:

The following general hardware and software components are supported by the latest releases of SedonaDashboard and SedonaAnalytics:

Browsers

- Internet Explorer: 7, 8, 9, 10, 11 (Certified); see note below about earlier versions.
- Microsoft Edge 20
- Firefox, Chrome: all current public versions (Supported).
- Opera, Safari: all current public versions (Supported). Hardware
- 1 GHz or higher processor recommended; 400 MHz minimum required.
- 1 GB or higher RAM recommended; 512 MB of RAM minimum required.
- 1 GB of available disk space (with .NET already installed).

Operating Systems

- Windows Server 2012 R2, 2008, 2003
- Windows 10 (all editions)
- Windows 8 (all editions except RT)
- Windows 7 (all editions)
- 32-bit and 64-bit Windows OS supported Web Servers
- Microsoft Internet Information Server (IIS) 7.x, 8.x o ASP o ASP.net o Hostable web core
- Internal DNS Entry

Other Software The following component must be installed for SedonaDashboard and SedonaAnalytics:

- Microsoft .NET Framework 4.x Data Sources SedonaDashboard and SedonaAnalytics need access to your SQL server. Both the server hosting the SedonaMaster and the server hosting your company databases (if they are on separate servers).

Outside of Network Access SedonaDashboard and SedonaAnalytics can be accessed outside of your network through a Web Interface. The Requirements for this would be:

- Open TCP port 443 (port 80 optional) to the public internet
- Static public IP address tied to DNS entry
- Public DNS entry for SedonaDashboard (example sedonadashboard.yourdomain.com)
- SSL Certificate from a public Certificate provider (example GoDaddy or Verisign) that matches your DNS entry

Notes

Microsoft Internet Information Server (IIS) must be installed before installing SedonaDashboard and SedonaAnalytics. SedonaDashboard and SedonaAnalytics requires .NET Framework 4.x. If not already in place, with your consent, appropriate versions of the .NET Framework are installed when SedonaDashboard and SedonaAnalytics is installed. They are also available for free from the Microsoft Download Center. Browser updates are being released so rapidly that it's impossible for us to guarantee that all browser versions will work on a day-to-day basis, or that a new browser release won't be incompatible with an older version of SedonaDashboard and SedonaAnalytics.

How Should Your Server Be Configured?

In a typical scenario with an average data size per report (less 10MB of data per report), you should be able serve 50-100 concurrent users per multi-core CPU on a production server, assuming a good amount of RAM (2GB+) and a fast hard drive (12K RPM+).

Here are three representative configuration levels for the web server.

A low-performance hardware configuration: 1 multi-core CPU, 1-2GB RAM, 12K RPM HD, 32-bit OS

A better performance configuration (for more users or more data): Quad-Core CPU, 2-4GB+ RAM, 15K RPM HD, 32-bit OS

The best performance configuration begins with the previous configuration and adds: Additional CPUs (2 or more Quad-Core CPUs), more RAM (8GB+), 64-bit OS, or move to a clustered environment.

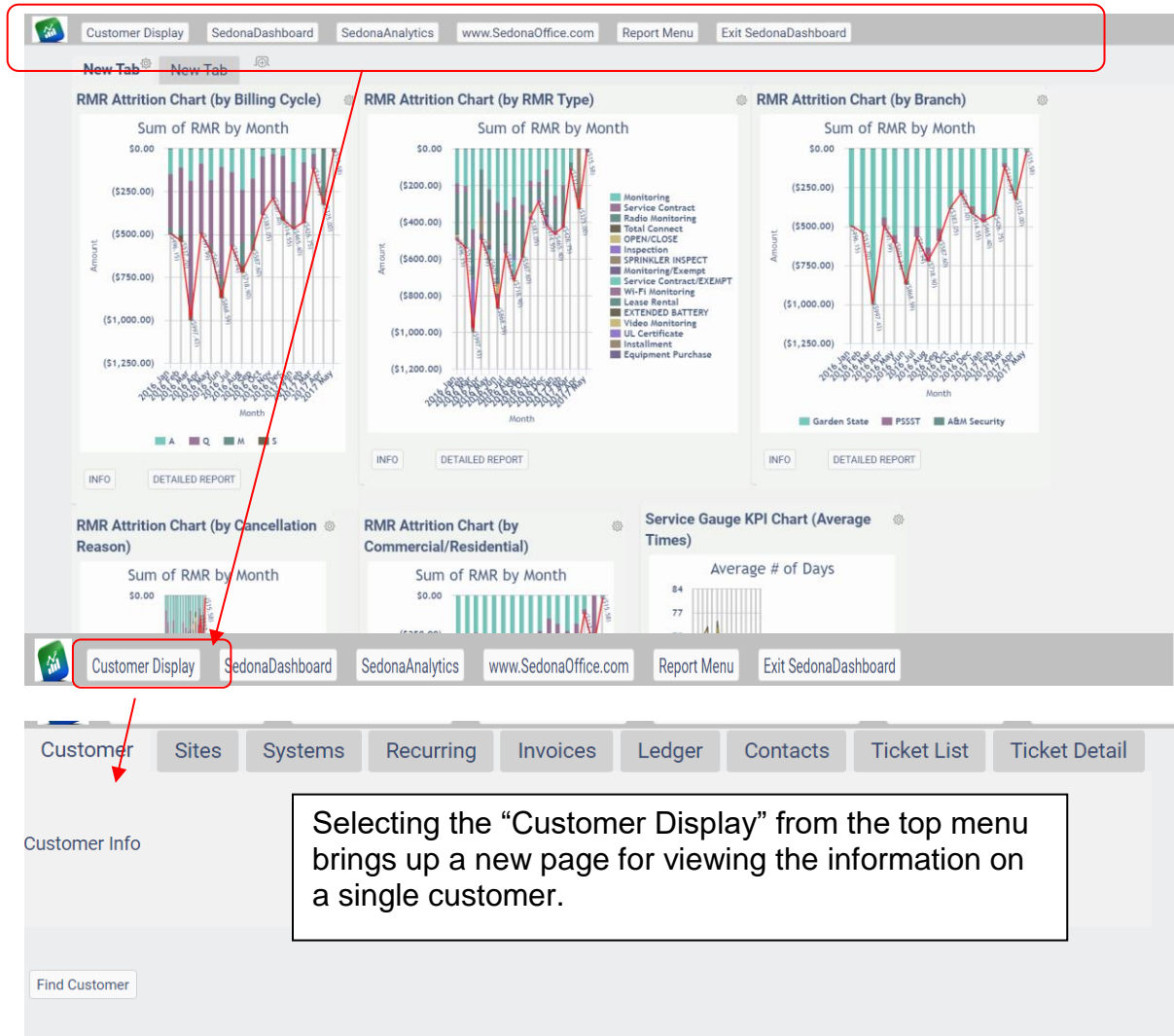
Here are a few general "rules of thumb" when considering server configuration options:

- More Data and Data Complexity = More RAM
- More Reports, Larger Reports, Complex Reports = Faster hard disk, more available hard disk space
- More Traffic and Concurrent Visitors = More CPUs/Cores

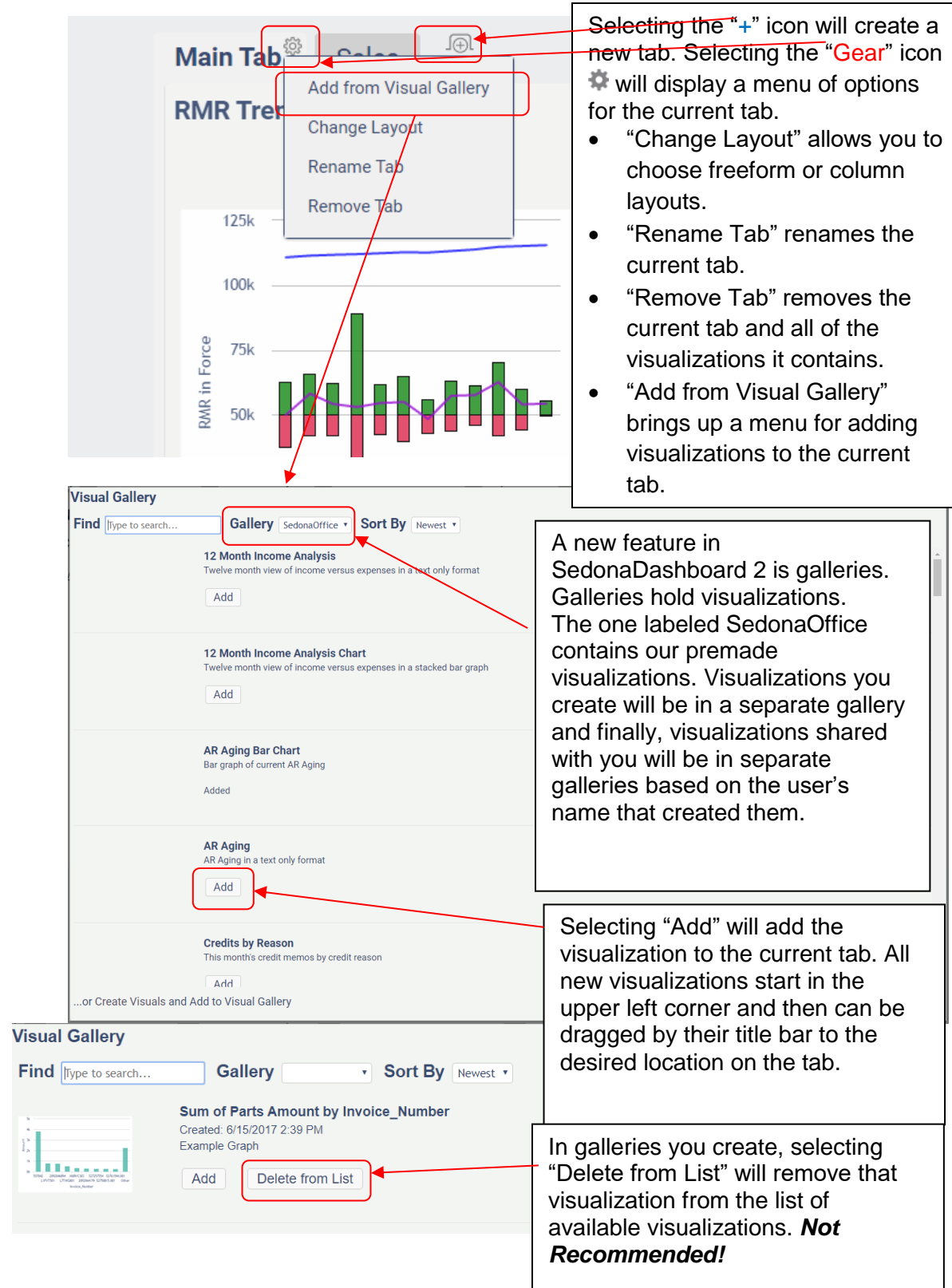
SedonaDashboard is available for use on SedonaOffice versions 5.7.48 or higher.

Application Features

Main Screen and Customer Display



Changing the Dashboard Layout



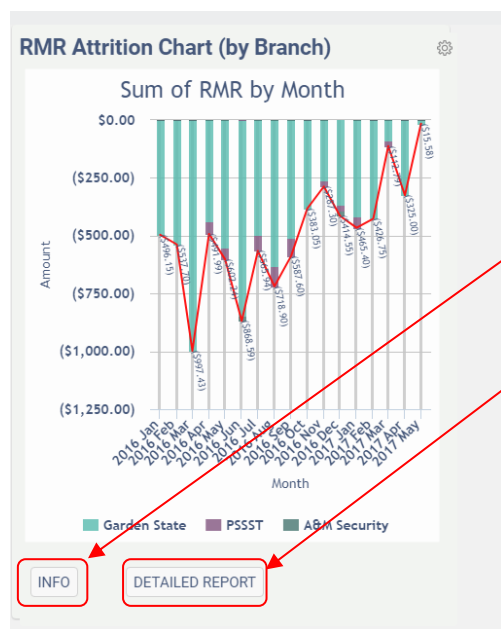
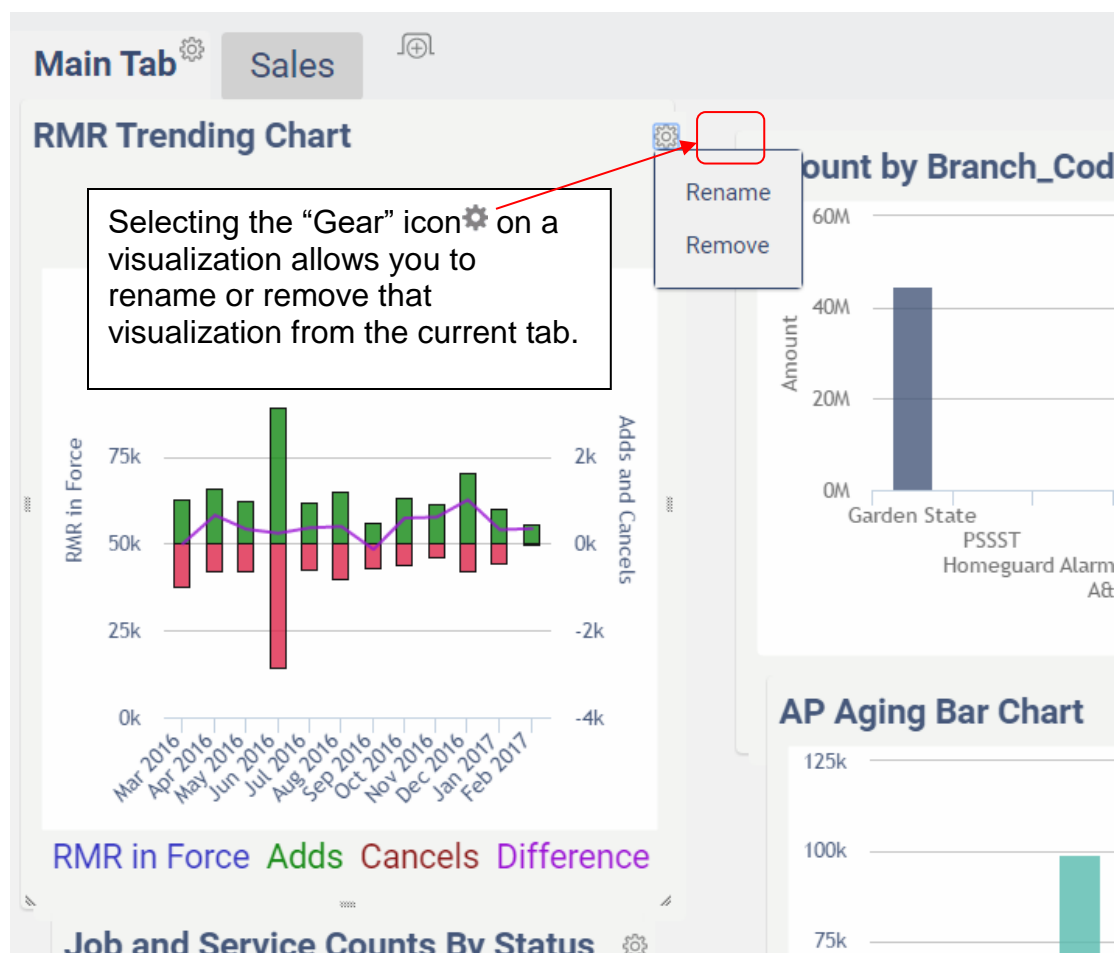
Selecting the “+” icon will create a new tab. Selecting the “Gear” icon will display a menu of options for the current tab.

- “Change Layout” allows you to choose freeform or column layouts.
- “Rename Tab” renames the current tab.
- “Remove Tab” removes the current tab and all of the visualizations it contains.
- “Add from Visual Gallery” brings up a menu for adding visualizations to the current tab.

A new feature in SedonaDashboard 2 is galleries. Galleries hold visualizations. The one labeled SedonaOffice contains our premade visualizations. Visualizations you create will be in a separate gallery and finally, visualizations shared with you will be in separate galleries based on the user’s name that created them.

Selecting “Add” will add the visualization to the current tab. All new visualizations start in the upper left corner and then can be dragged by their title bar to the desired location on the tab.

In galleries you create, selecting “Delete from List” will remove that visualization from the list of available visualizations. **Not Recommended!**



SedonaDashboard 2 visualizations have two new buttons added.

- An "Info" button explaining what data is displayed and how it is organized
- A button to launch the "Detailed Report".

Page Footer

The page footer has a number of quick links to SedonaOffice.com, support, etc.

[About Us](#)
 Perennial Software, Inc
 Makers of **SedonaOffice** and **AlarmBillr**

[Navigation](#)
www.SedonaOffice.com
www.AlarmBillr.com

[Contact Us](#)
Support@SedonaOffice.com
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SedonaAnalytics Introduction

Selecting the "SedonaAnalytics" button in the main menu will open the SedonaAnalytics designer where you can make custom visualizations and reports.

If you have no custom items or you select the "?" icon you will see the introduction message.

The list of visualizations and reports has two views, "My Items", items created by you, and "Shared with Me", which are items created by others and shared with you.

Each item has a "Type" icon showing if it is a visualization, dashboard or report. There are four actions that can be taken for each item. The "eye" icon allows you to view the item. The "PDF" icon displays the item as a PDF file. The "pencil" icon allows you to change the name of the item. The "trash can" icon allows you to delete the item. Be careful when deleting, there is no recover function.

Customer Display SedonaDashboard **SedonaAnalytics** www.SedonaOffice.com Report Menu Exit SedonaDashboard

Build Dashboards to view collections of live Visuals from your Visual Gallery, in groups that make sense others.

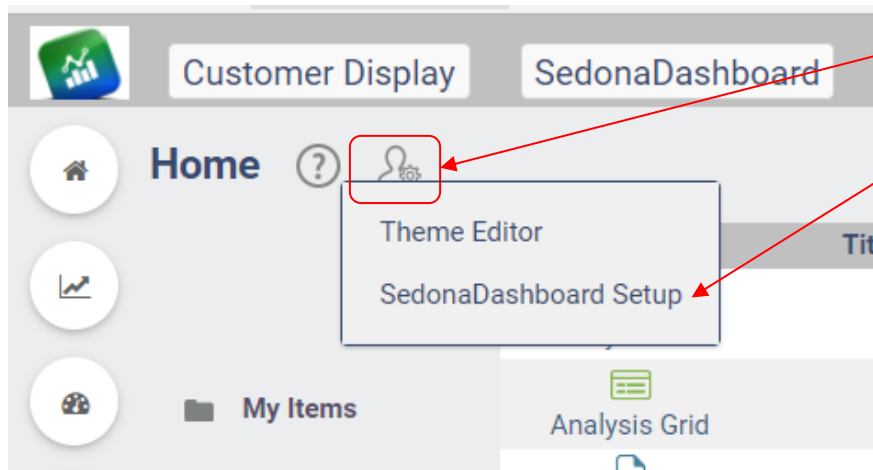
Design Reports to place your Visuals, and other content into a customized layout, suitable for browsing, email distribution.

Your creations get automatically saved for later.

What will you visualize today?

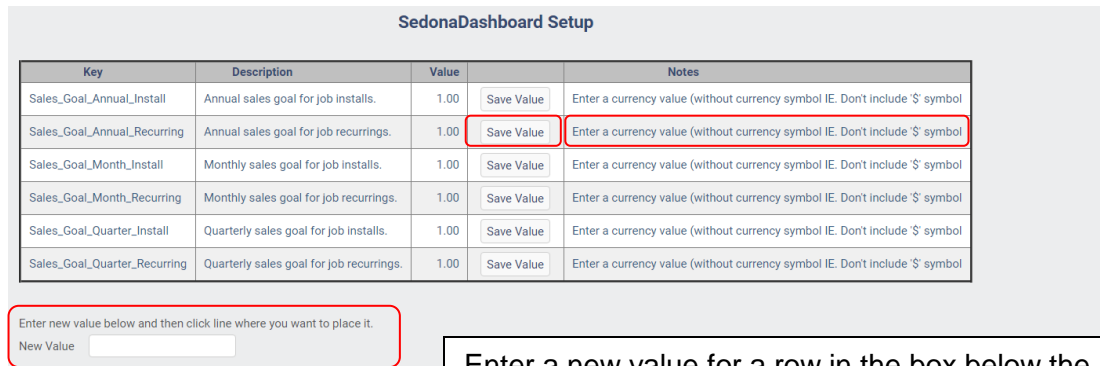
Type	Title	Report Name	Shared	View	Actions	Saved
Analysis Grid	Customer List			View	PDF, Edit, Delete	5/24/2017 1:34:06 PM
Analysis Grid	Tickets by Branch			View	PDF, Edit, Delete	5/24/2017 1:44:06 PM
Report	Tickets by Branch Report			View	PDF, Edit, Delete	5/24/2017 2:14:40 PM
Analysis Grid	AP Bills			View	PDF, Edit, Delete	6/15/2017 2:38:49 PM
Dashboard	User Created Dashboard			View	PDF, Edit, Delete	6/21/2017 10:03:08 AM

Administrative Functions



The screenshot shows the SedonaDashboard interface. At the top, there are tabs for 'Customer Display' and 'SedonaDashboard'. Below the tabs, there is a navigation bar with icons for 'Home', a help icon, and a user icon. The user icon is highlighted with a red box, and a red arrow points from a text box to it. A dropdown menu is open, showing 'Theme Editor' and 'SedonaDashboard Setup'. A red arrow points from the text box to 'SedonaDashboard Setup'.

Selecting the “Admin Tools” displays a list of administrative options. SedonaDashboard Setup



The screenshot shows the 'SedonaDashboard Setup' table. The table has columns for 'Key', 'Description', 'Value', and 'Notes'. The 'Value' column contains '1.00' and a 'Save Value' button. The 'Notes' column contains instructions: 'Enter a currency value (without currency symbol IE. Don't include \$ symbol)'. The 'Save Value' button and the 'Notes' text are highlighted with red boxes. Below the table, there is a text input field labeled 'New Value' and a button labeled 'Enter new value below and then click line where you want to place it.'.

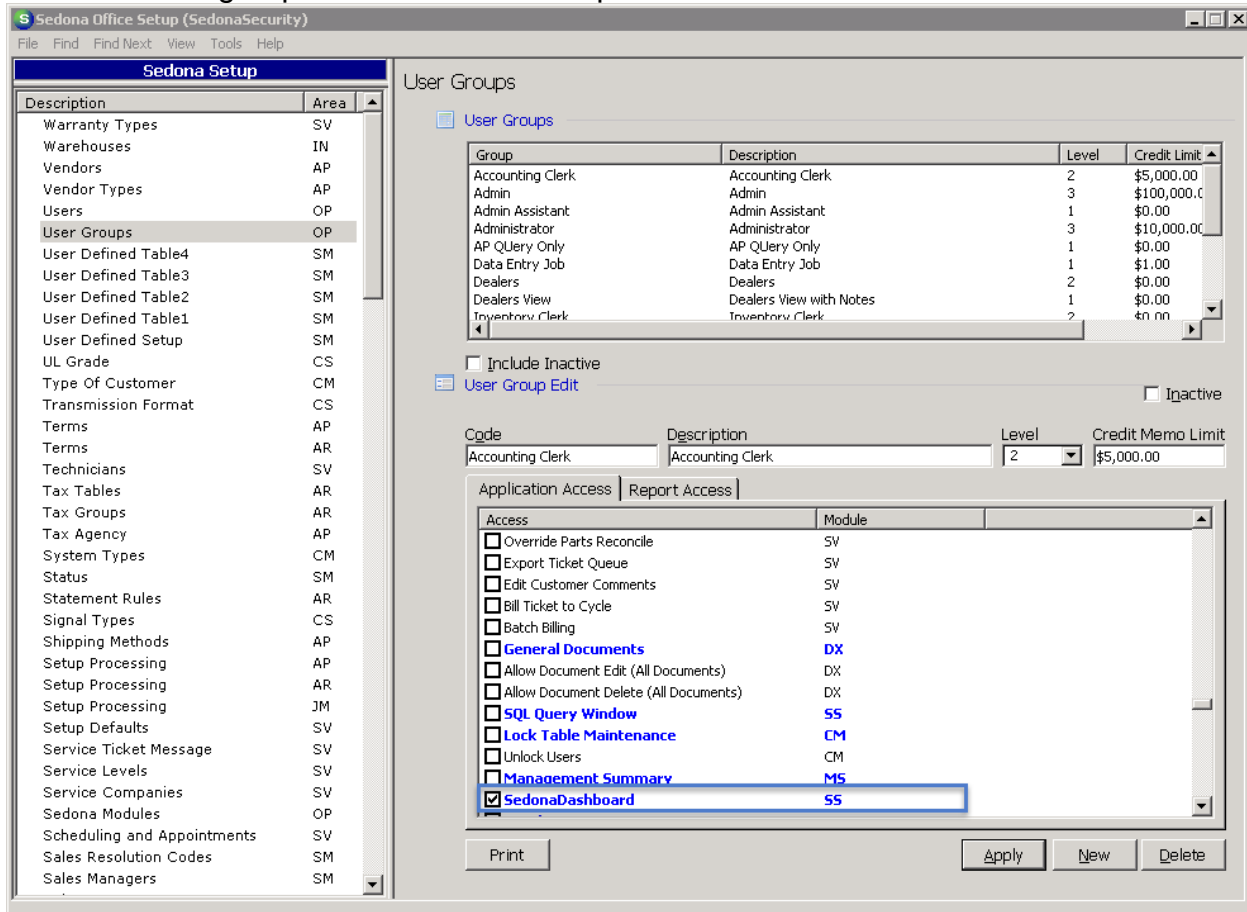
Key	Description	Value	Notes
Sales_Goal_Annual_Install	Annual sales goal for job installs.	1.00 <input type="button" value="Save Value"/>	Enter a currency value (without currency symbol IE. Don't include \$ symbol)
Sales_Goal_Annual_Recurring	Annual sales goal for job recurrings.	1.00 <input type="button" value="Save Value"/>	Enter a currency value (without currency symbol IE. Don't include \$ symbol)
Sales_Goal_Month_Install	Monthly sales goal for job installs.	1.00 <input type="button" value="Save Value"/>	Enter a currency value (without currency symbol IE. Don't include \$ symbol)
Sales_Goal_Month_Recurring	Monthly sales goal for job recurrings.	1.00 <input type="button" value="Save Value"/>	Enter a currency value (without currency symbol IE. Don't include \$ symbol)
Sales_Goal_Quarter_Install	Quarterly sales goal for job installs.	1.00 <input type="button" value="Save Value"/>	Enter a currency value (without currency symbol IE. Don't include \$ symbol)
Sales_Goal_Quarter_Recurring	Quarterly sales goal for job recurrings.	1.00 <input type="button" value="Save Value"/>	Enter a currency value (without currency symbol IE. Don't include \$ symbol)

Enter new value below and then click line where you want to place it.
New Value

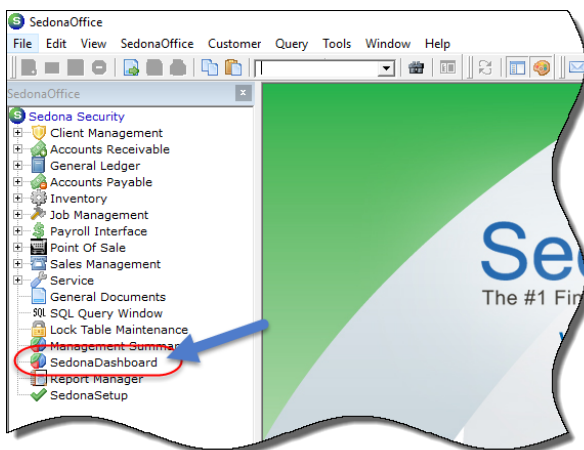
Enter a new value for a row in the box below the grid. The “Notes” explain what type of entry is needed.
Then select “Save Value” on the row where you want the new value to be set.

Usergroup Table

Users that need access to SedonaDashboard must be given access to the module within the Usergroup table in SedonaSetup.



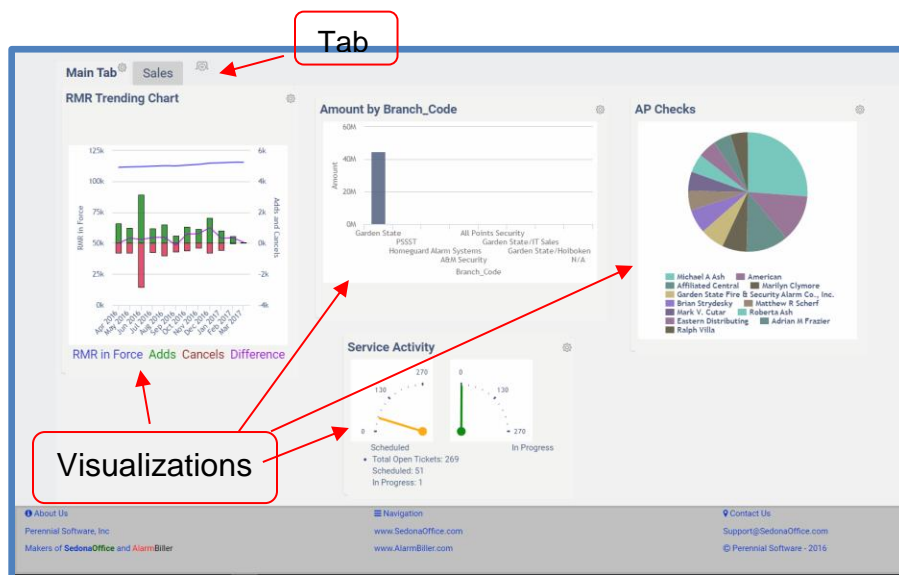
Once access has been granted with the User Group permission, a new icon will appear on the main application menu.



Concepts and Terms

Dashboard, Visualizations, and Tabs

The dashboard is a single horizontal screen on which information is placed in the form of Visualizations. Visualizations may depict information visually (charts and graphs) or by text (counts, dollar amounts, etc.). Folder tabs may be used to organize data by subject matter or to otherwise label different views. When users define their dashboard, their preferences are automatically saved. Each time a user opens their dashboard, visualizations information is automatically updated.



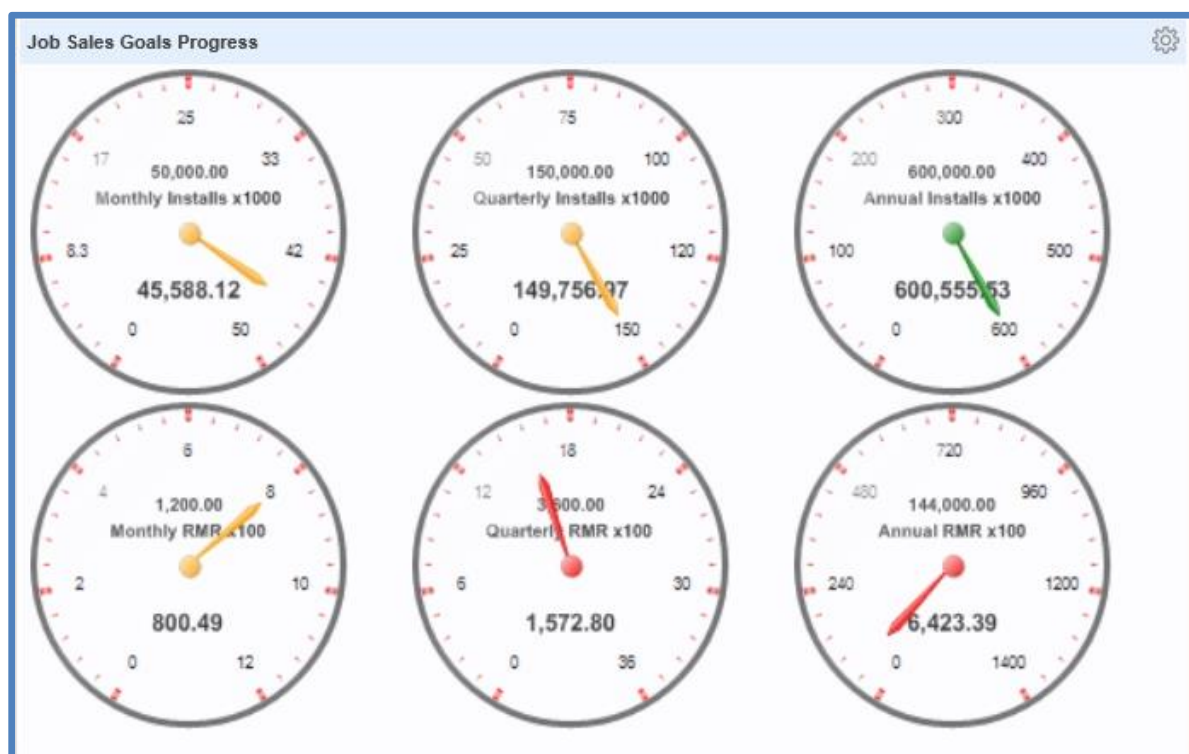
Hovering the mouse over a specific area of a chart or graph enables totals to appear in a pop-up window representing the area selected.



Gauges

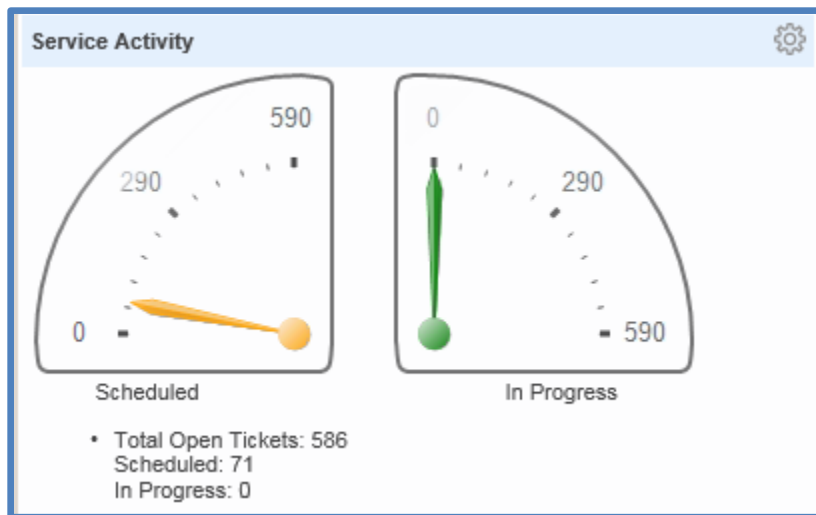
Gauges measure sales performance against a targeted goal. The six gauges below are available through the Job Sales Goal Progress visualizations. SedonaOffice customers need to provide SedonaOffice Support personnel with their monthly, quarterly and annual sales goals for install dollars and RMR within jobs broken down by monthly, quarterly, and annual dollars. Unless goals are provided, the default for each gauge will be \$1.00.

When goals are set behind the scenes, the colors on the needles will represent progress toward those goals. Green indicates that the company has met or exceeded its goal, yellow means that it is more than ½ way to reaching the goal, and red indicates that the company is under ½ way to meeting its goal.

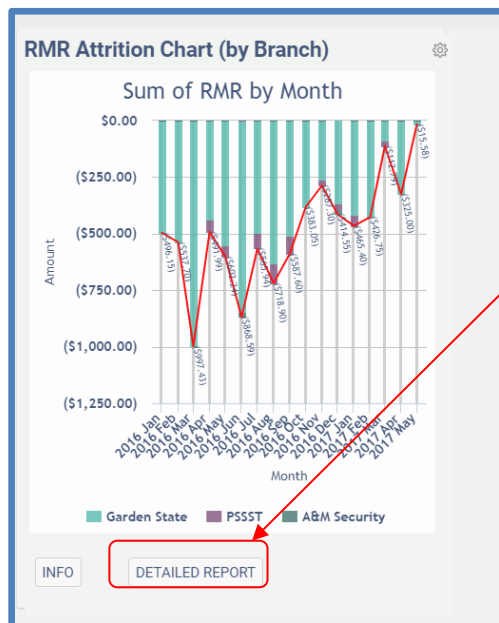


Meters

Meters show performance progress. Unlike gauges, the needles colors do not carry significance. In the example below, the yellow needle indicates that only 71 out of 586 service tickets have been scheduled. The green needle indicates that 0 are in progress. Meters are a great way for management to know when to respond when performance is not as anticipated.

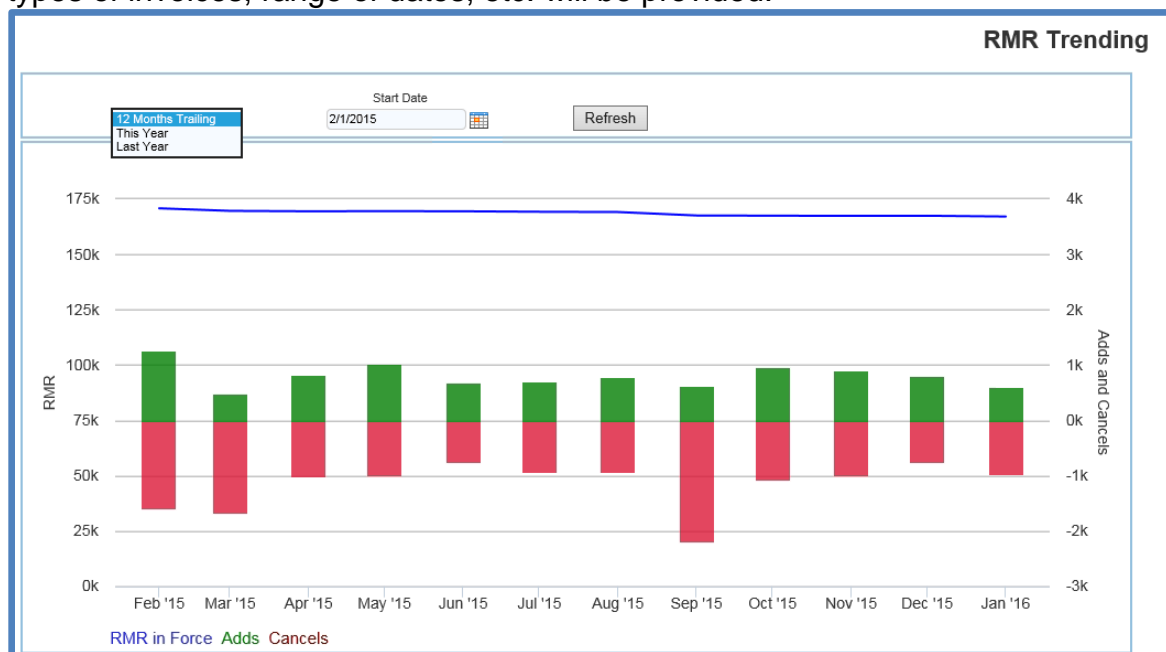


Drill Down



Users can drill down into chart data by clicking on the "Detailed Report" button to further analyze the information.

The chart will re-open in a new window offering filtering options to further granulate the data. Depending upon the subject matter of the visualizations, filters such as branches, types of invoices, range of dates, etc. will be provided.



Depending upon the subject of the visualizations, further drill-down may lead to an analysis grid. The list of visualizations definitions in this document include information on whether an Analysis Grid is available for each visualization.

Analysis Grid

An analysis grid enables the creation of new columns with custom calculations, ability to hide/sort columns, filter data, add new groupings, add charts, and perform aggregations using advanced functions. Analysis grids are a powerful tool. Analysis grids may be exported to Excel, .csv, or .pdf format.

Cancels

Return to Trending

Show RMR

Show Adds

Refresh Data

Save Layout

Restore Layout

Reset Layout

Formula

Filter

Add Chart

Table

44

Page 1 of 2

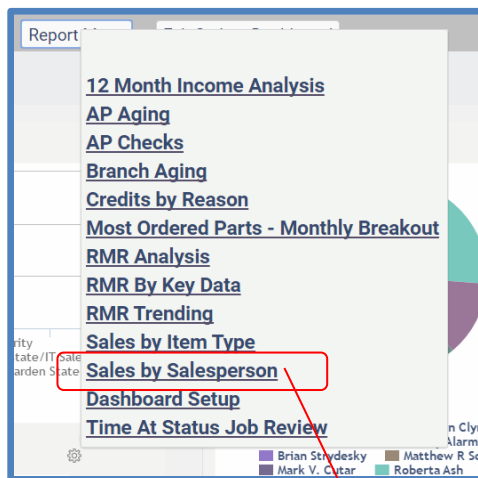
Export Excel CSV PDF

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-36.75	8/5/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/5/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/5/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/5/2015	Comm/Equip. Failure	Full	Ranier Branch
7003410	Gold, Tom	1850 S Frontage Rd S	1	RM082392	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7003410	Gold, Tom	1850 S Frontage Rd S	1	RM082392	-25.66	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-42.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-60.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7002797	Lydens, Tom	503 Oro Grande	1	RM080706	-30.00	8/7/2015	Moved	Full	McKinley Branch
7002797	Lydens, Tom	503 Oro Grande	1	RM080706	-5.00	8/7/2015	Moved	Full	McKinley Branch
7003009	Hanning, Tom	18 Slag Gulch Ct	1	RM081219	-9.02	8/7/2015	Moved	Full	McKinley Branch
7003009	Hanning, Tom	18 Slag Gulch Ct	1	RM081219	-37.63	8/7/2015	Moved	Full	McKinley Branch
7002676	Yasary, Fred	44 Turnberry Pl, Side A	1	RM080407	-4.44	8/13/2015	Comm/Equip. Failure	Full	McKinley Branch
7002676	Yasary, Fred	44 Turnberry Pl, Side A	1	RM080407	-39.52	8/13/2015	Comm/Equip. Failure	Full	McKinley Branch
7000696	Goodrich, John	5410 BettyAche Rd.	1	AGSM0072	-10.00	8/13/2015	Item Change	Partial	McKinley Branch
7001440	Berry, Fred	2 Maple School Rd	1		-69.64	8/24/2015	Shed/System Change	Partial	Ranier Branch
7002356	Styker, Fred	176 Fairway Dr	1	RMCA2622	-46.41	8/25/2015	Moved	Full	Ranier Branch
7003140	Kennedy, Tom	45 Protector Place	1	RMCA1470	-37.63	8/27/2015	Moved	Full	McKinley Branch
7002416	Thigpen, Fred	2905-A Aspen Ln	1	RMCA2696	-39.52	8/28/2015	Moved	Full	McKinley Branch
7002416	Thigpen, Fred	2905-A Aspen Ln	1	RMCA2696	-4.44	8/28/2015	Moved	Full	McKinley Branch

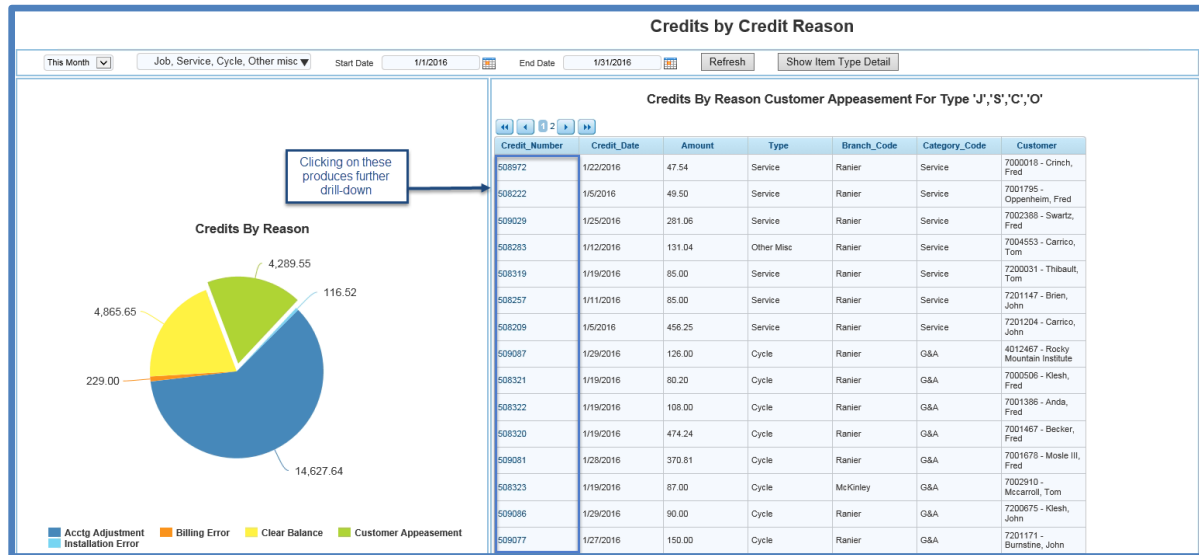
Reports

Several of the dashboard Visualizations are also available in the form of a report. The advantages of a report over a visualization is saving space on the dashboard as well as the ability to immediately drill down into filtered data.

When a report is selected from the list, a new window will open containing the graphical depiction (if available) and the ability to immediately drill into the data. Some reports display the graph and a list of customers making up the totals while others go immediately to an analysis grid. The list of reports may be displayed clicking on the “Report Menu” button on the dashboard header. Reports you create will be at the bottom of the report list.



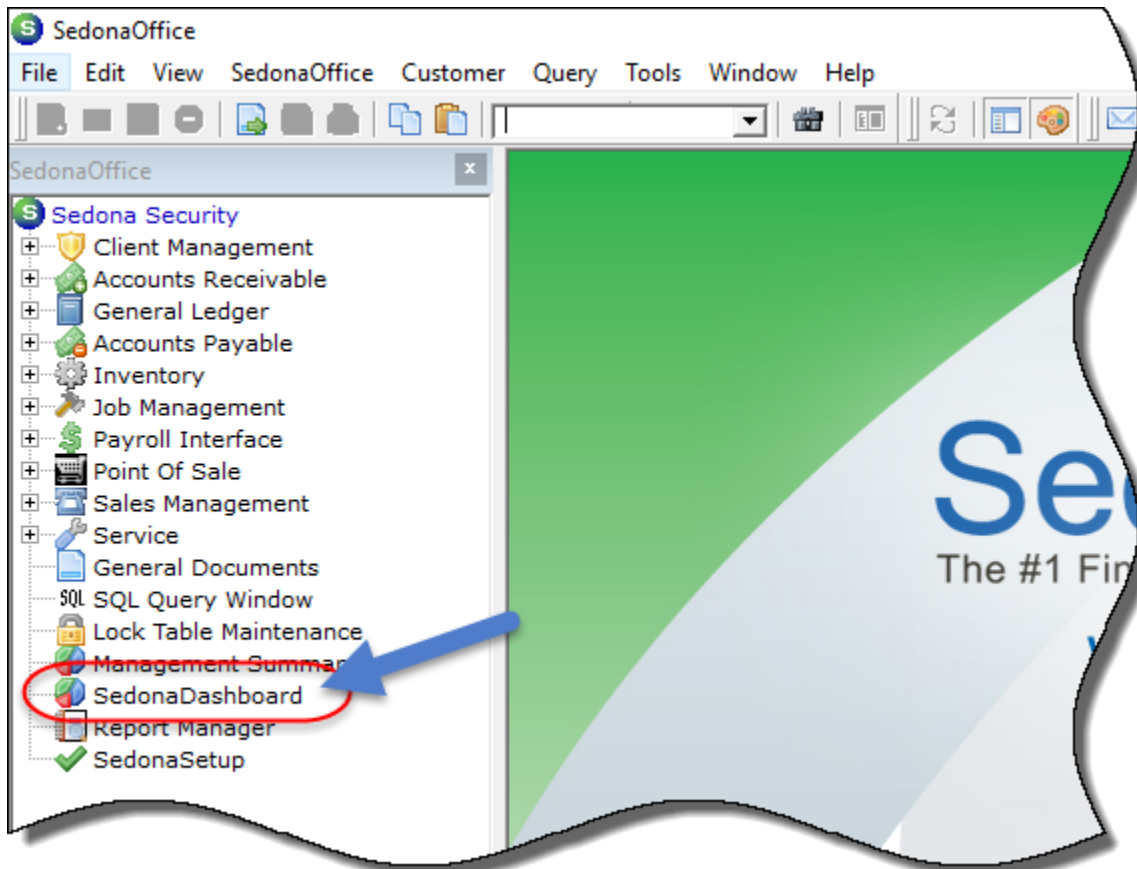
Unlike Visualizations, reports can also contain hotspots where data appears in dark blue indicating that it can be drilled into further:



Launching SedonaDashboard

Within SedonaOffice

SedonaDashboard may be launched by-clicking on the icon for SedonaDashboard from the Main Application Menu Tree. SedonaDashboard will take up to one minute to initially load.



Remotely

At the time of installation, SedonaOffice Support will provide information on the specific website to be used to gain remote access to SedonaDashboard. Users will login to the website provided using their SedonaOffice username and password. This will bring them directly into their dashboard.

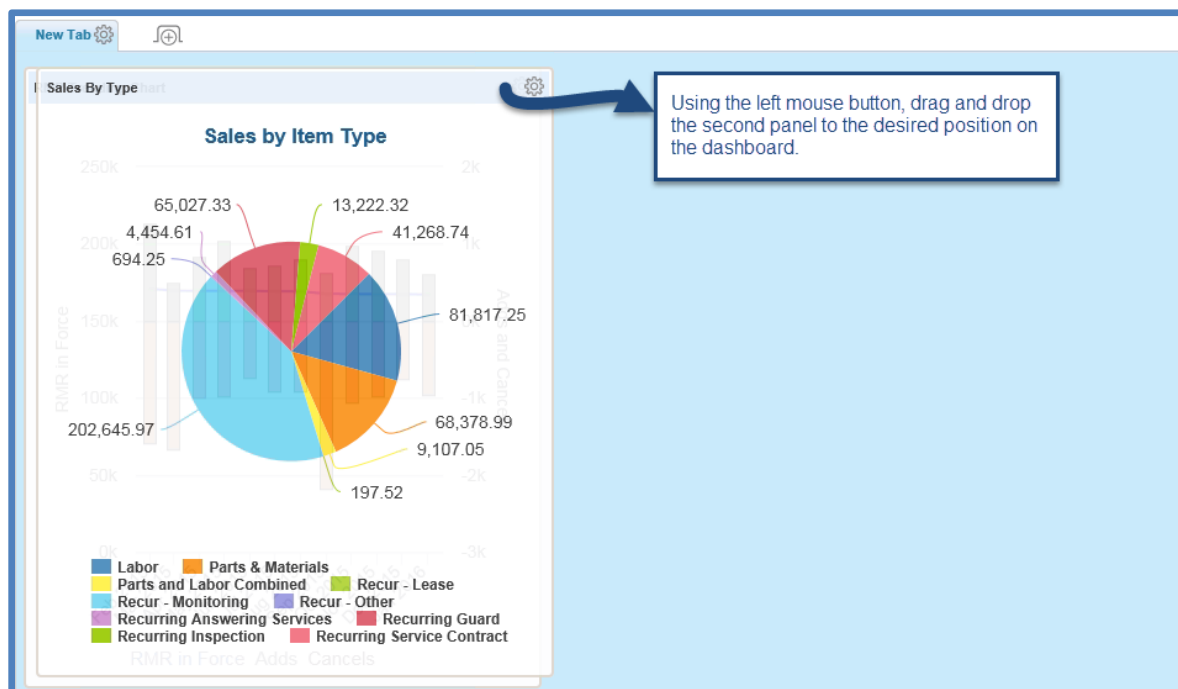


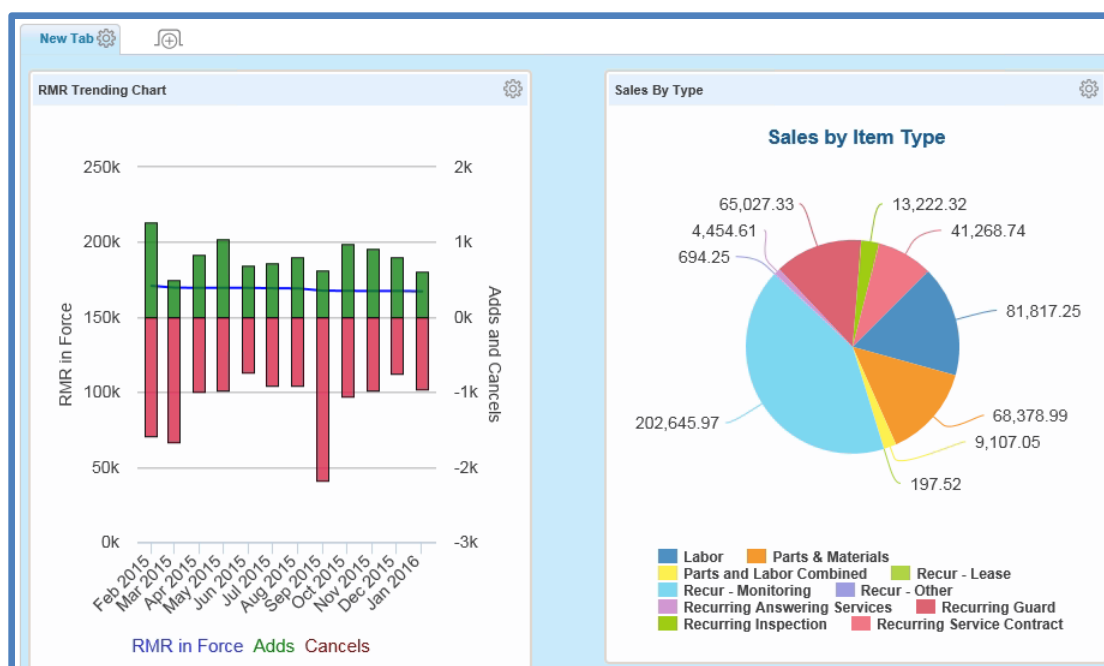
Designing the Dashboard

Adding Visualizations

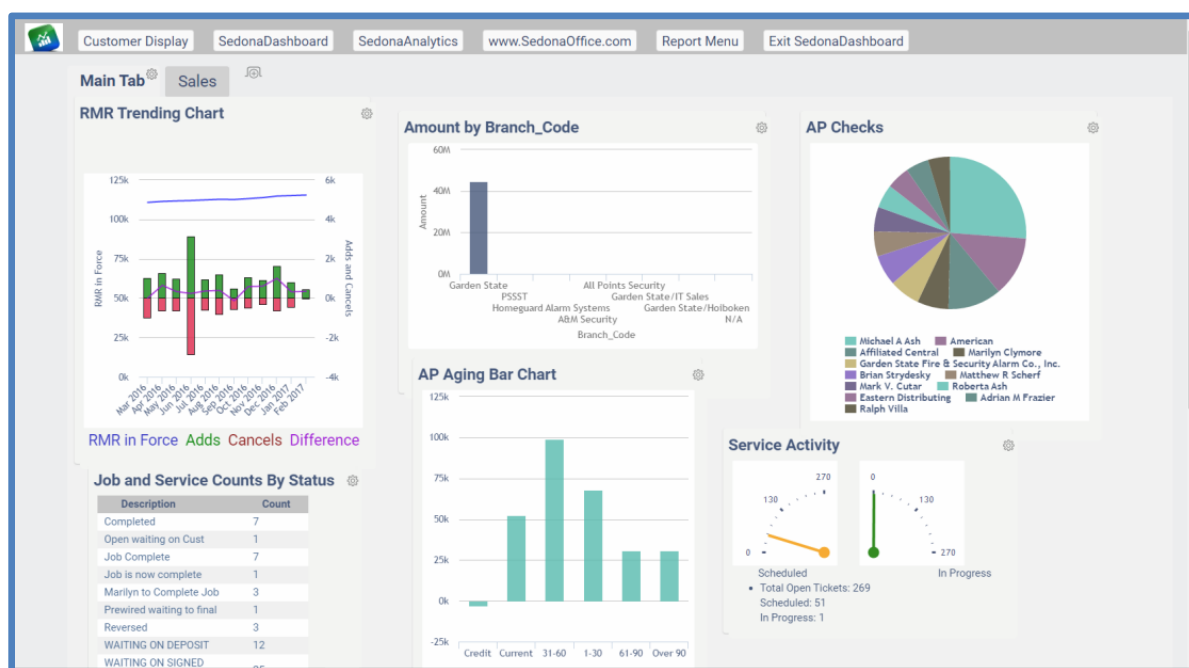
SedonaDashboard offers pre-defined Visualizations depicting specific metrics in the form of charts, graphs, and reports. When the dashboard is launched for the first time, a list of Visualizations will be available for selection. Scroll through the list to find the specific Visualizations for your dashboard. Click the “Add” button next to each visualization to be displayed under the first tab. Once these Visualizations have been selected, press the Done key in the bottom right-hand corner of the screen. The number of Visualizations chosen will dictate how long it will take to load and display the Visualizations due to the number of calculations being done simultaneously.

In the example below, the RMR Trending Chart and the Sales By Type This Month Charts are selected for display. The Sales By Type Chart automatically overlaps the RMR Trending Chart in the first position. Position the cursor in the blue title bar and (using the left mouse button) drag the visualizations to the right and drop it to appear in a new position on the dashboard. This step must be repeated for each new visualization added.







All new visualizations start in the upper left corner and then can be dragged by their title bar to the desired location on the tab.



Removing Visualizations

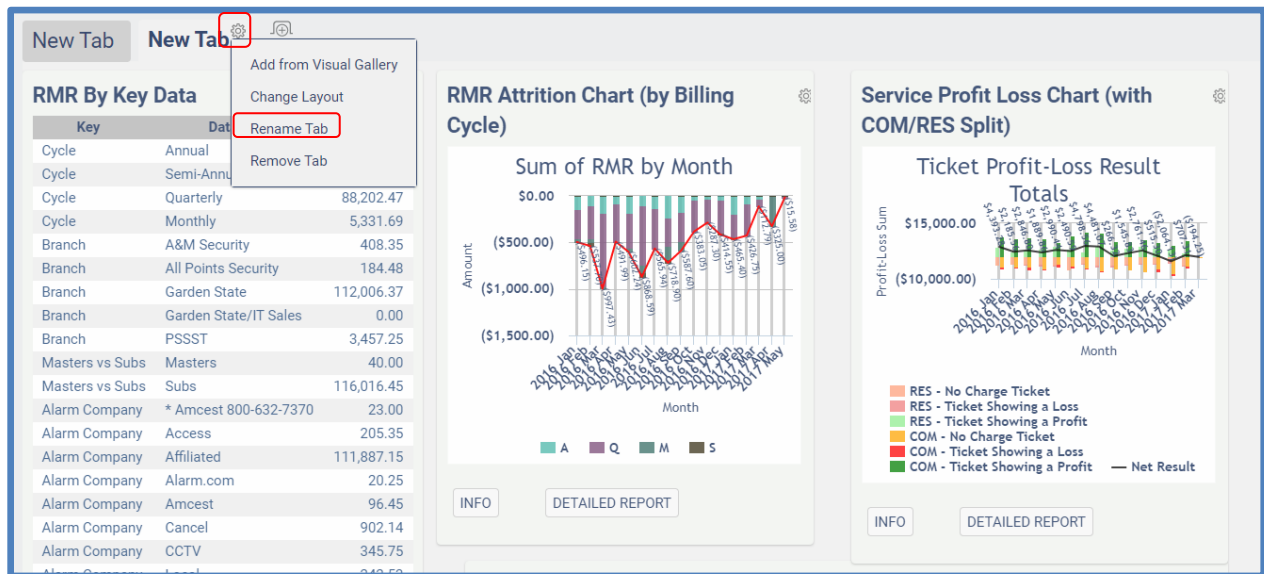
Individual Visualizations may be removed by clicking on the  icon next to the title of the visualization and selecting the option Remove.

Renaming Visualizations


The pre-defined Visualizations that come with SedonaDashboard have already been given names. Each User may choose to name a specific visualization differently on their dashboard. To rename a visualization, click on the  next to the title and select Rename. Enter the new name of the visualizations in the title and press Enter.

Tabs

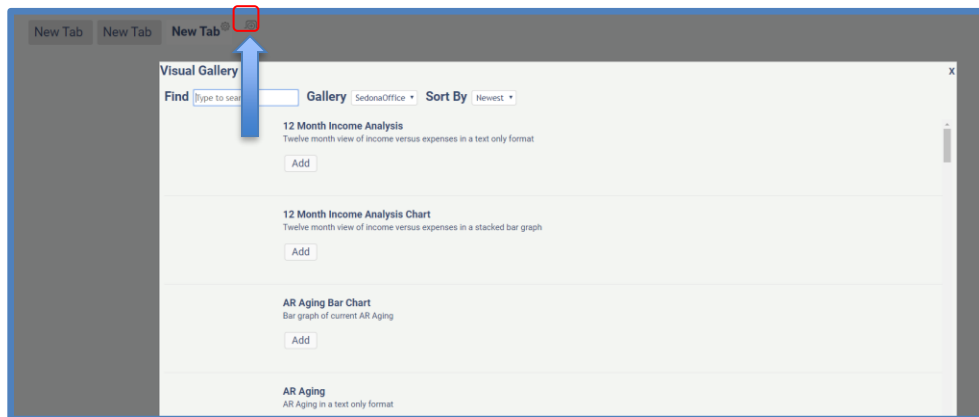
Renaming a Tab




Folder tabs are used to organize Visualizations or otherwise define a view. For example, the RMR Trending Chart and RMR By Key Data Chart might be held on the tab entitled “RMR” whereas Visualizations depicting sales would be found under a different tab name.

To rename a tab, click on the  in the tab and select the option “Rename Tab.” Type the new name of the tab in the space provided and press Enter.

Adding a New Tab



To add additional tabs, press the  button next to the first tab. A new tab is added (in the shaded background) and the Add Visualizations list appears for the selection of Visualizations to be added under the new tab.

Removing a Tab

The screenshot shows a dashboard with three main sections: 'RMR By Key Data', 'RMR Attrition Chart (by Billing Cycle)', and 'Service Profit Loss Chart (with COM/RES Split)'. The 'RMR By Key Data' section contains a table with columns 'Key' and 'Data'. A context menu is open over the 'New Tab' button, showing options: 'Add from Visual Gallery', 'Change Layout', 'Rename Tab', and 'Remove Tab'. The 'Remove Tab' option is highlighted with a red box.

Key	Data
Cycle	Annual
Cycle	Semi-Annual
Cycle	Quarterly
Cycle	Monthly
Branch	A&M Security
Branch	All Points Security
Branch	Garden State
Branch	Garden State/IT Sales
Branch	PSSST
Masters vs Subs	Masters
Masters vs Subs	Subs
Alarm Company	* Amcest 800-632-7370
Alarm Company	Access
Alarm Company	Affiliated
Alarm Company	Alarm.com
Alarm Company	Amcest
Alarm Company	Cancel
Alarm Company	CCTV

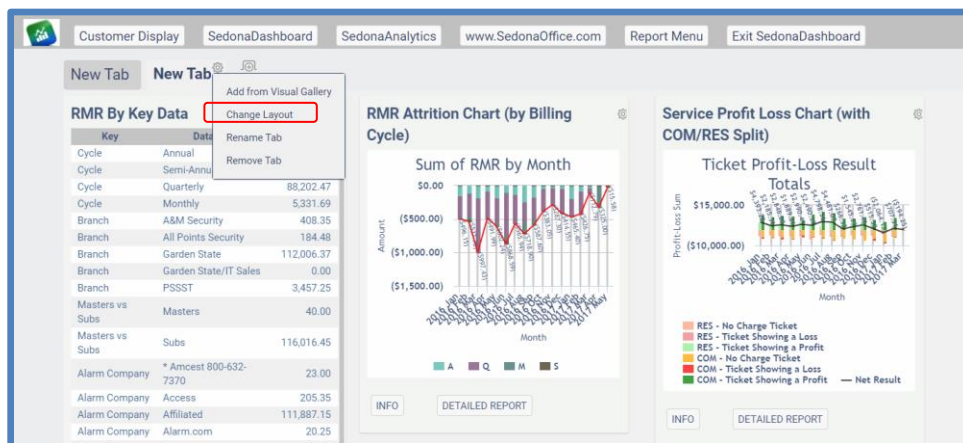
To remove a tab (and all of the Visualizations within it), click on the  next to the name of the tab and select the option Remove Tab.

The user will be prompted to confirm their intention to remove the tab. Once the OK button is clicked, the tab will be removed.

Remove? Are you sure?

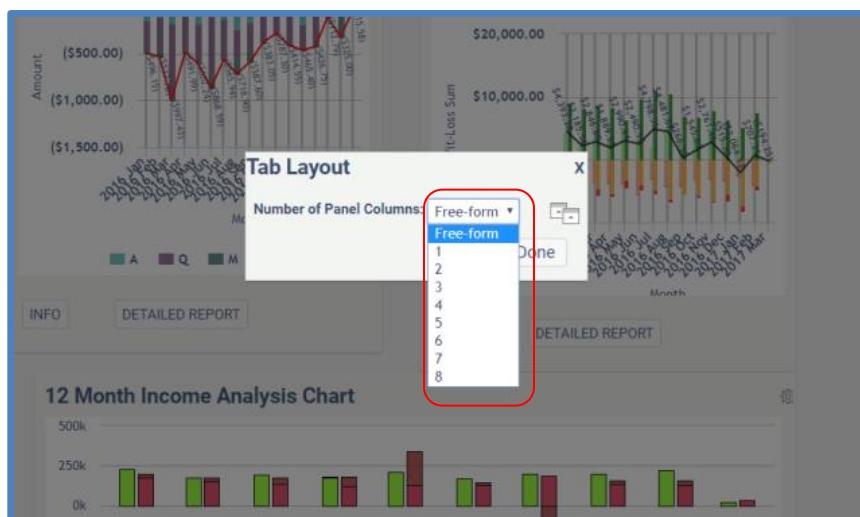
OK Cancel

Changing the Layout of Visualizations



The default visualizations layout is free-form enabling the user to place Visualizations anywhere within the dashboard. In the event that columns are needed, instead of the free-form format, the layout of the dashboard may be changed.

To change the layout, click on the  next to the name of the tab and select Change Layout.



The user may select to have up to 8 columns of Visualizations per tab. Select the appropriate number of columns for display within the tab. Select the radio button indicating whether uniform column widths should be set for all columns, a wider column should appear in the first column, or the last column should be the widest. After the appropriate selections are made, press the Done key.

The Visualizations are now depicted in defined. The user may drag and drop the Visualizations into any of the columns.

