

## **SedonaOffice Users Conference** San Francisco, CA | January 21 – 24, 2018

# **Dashboard 2**

Presented by: Matt Howe

# **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**





## Changing the Dashboard Layout

Main Tab Add from Visual Gallery RMR Tree Change Layout Remove Tab 125k 100k 100k 100k 50k Visual Gallery Visual Gallery	<ul> <li>Selecting the "+" icon will create a new tab. Selecting the "Gear" icon</li> <li>will display a menu of options for the current tab.</li> <li>"Change Layout" allows you to choose freeform or column layouts.</li> <li>"Rename Tab" renames the current tab.</li> <li>"Remove Tab" removes the current tab and all of the visualizations it contains.</li> <li>"Add from Visual Gallery" brings up a menu for adding visualizations to the current tab.</li> </ul>
Find Type to search  Gallery SedonaOffice  Sort By Newest  I2 Month Income Analysis  Twelve month view of income versus expenses in a nationally format  Add  I2 Month Income Analysis Chart  Twelve month view of income versus expenses in a stacked bar graph  Add  AR Aging Bar Chart Bar graph of current AR Aging Added  AR Aging I a text only format	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.
Add   Credits by Reason   This month's credit memos by credit reason   Ard  or Create Visuals and Add to Visual Gallery   Visual Gallery  Visual Gallery  Sum of Parts Amount by Invoice_Number  Created: 6/15/2017 2:39 PM Example Graph  Add Delete from List	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.



#### Page Footer

O About Us	■ Navigation	
Perennial Software, Inc	www.SedonaOffice.com	Support@SedonaOffice.com
Makers of SedonaOffice and AlarmBiller	www.AlarmBiller.com	© Perennial Software - 2016

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

## **SedonaAnalytics Introduction**



## **Administrative Functions**



SedonaDashboard Setup									
Кеу	Description	Value		Notes					
Sales_Goal_Annual_Install	Annual sales goal for job installs.	1.00	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	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	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	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	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	Save Value	Enter a currency value (without currency symbol IE. Don't include '\$' symbol					

Enter new val	ue 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.

Sedona Office Setup (SedonaSecu				
ile Find Find Next View Tools Helj	)			
Sedona Setup		User Groups		
Description	Area 🔺			
Warranty Types	sv	User Groups		
Warehouses	IN	Group Descri	intion	Level Credit Limit
Vendors	AP		nting Clerk	2 \$5,000.00
Vendor Types	AP	Admin Admin		3 \$100,000.0
Users	OP		Assistant	1 \$0.00
User Groups	OP		istrator	3 \$10,000.00
User Defined Table4	SM		Jery Only Entry Job	1 \$0.00 1 \$1.00
User Defined Table3	SM	Dealers Dealer		2 \$0.00
User Defined Table2	SM —		rs View with Notes	1 \$0.00
User Defined Table1	SM	Inventory Clerk Inven	torv Clerk	2 \$0.00
User Defined Setup	SM			
UL Grade	CS	Include Inactive		
Type Of Customer	СМ	💷 User Group Edit		
Transmission Format	CS			□ I <u>n</u> active
Terms	AP	Description		Level Conditioner Lines
Terms	AR	Code Description	L	Level Credit Memo Limit
Technicians	sv	Accounting Clerk Accounting Cler	к	2 \$5,000.00
Tax Tables	AR	Application Access Report Access		
Tax Groups	AR	Access	Module	
Tax Agencγ	AP	Override Parts Reconcile	Nodule	<b>_</b> _
System Types	СМ			
Status	SM	Export Ticket Queue	SV SV	
Statement Rules	AR	Edit Customer Comments	SV SV	
Signal Types	cs			
Shipping Methods	AP	Batch Billing	SV	
Setup Processing	AP	General Documents	DX	
Setup Processing	AR	Allow Document Edit (All Documents)	DX	
Setup Processing	MC	Allow Document Delete (All Documents)	DX	
Setup Defaults	sv	SQL Query Window	55	
Service Ticket Message	sv	Lock Table Maintenance	CM	
Service Levels	sv	Unlock Users	CM	
Service Companies	sv	Management Summary	M5	
Sedona Modules	OP	SedonaDashboard	55	
Scheduling and Appointments	sv			
Sales Resolution Codes	SM	Print		Apply New Delete
Sales Managers	SM _			

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**



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.



Depnding 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 peform aggregations using advanced functions. Analysis grids are a powerful tool. Analysis grids may be exported to Excel, .csv, or .pdf format.

ancels Return to Trending	Show RMR Sh	ow Adds Refres	sh Data Save La	ayout Restore Layo	ut ResetLav	out				
Ū				Jour   Hostore Eago	at [ resource)	out.				
Formula V Filter	Add Chart									
🖃 Table 🐇										Export:
41 4 Page 1	of 2 🕨 🗰									
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	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch	
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch	
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch	
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch	
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch	
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-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		-66.00	8/6/2015	(A) Change System	Partial	Ranier Branch	
7002797	Lyders, Tom	503 Oro Grande	1	RMC80706	-30.00	8/7/2015	Moved	Full	McKinley Branch	
7002797	Lyders, Tom	503 Oro Grande	1	RMC80706	-5.00	8/7/2015	Moved	Full	McKinley Branch	
7003009	Homing, Tom	18 Stag Gulch Ct	1	RMCB1219	-9.02	8/7/2015	Moved	Full	McKinley Branch	
7003009	Homing, Tom	18 Stag Guich Ct	1	RMCB1219	-37.63	8/7/2015	Moved	Full	McKinley Branch	
7002676	Yeary, Fred	44 Tumberry PI, Side A	1	RMC80407	-4.44	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch	
7002676	Yeary, Fred	44 Tumberry PI, Side A	1	RMC80407	-39.52	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch	
7200806	Goldfarb, John	5410 BellyAche Rd.	1	AGSM3072	-10.00	8/13/2015	Item Change	Partial	McKinley Branch	
001449	Barry, Fred	2 Music School Rd	1		-68.64	8/24/2015	Site/System Change	Partial	Ranier Branch	
002356	Stryker, Fred	176 Fairway Dr	1	RMCA2622	-45.41	8/25/2015	Moved	Full	Ranier Branch	
003140	Kennedy, Tom	45 Protector Place	1	RMCB1470	-37.63	8/27/2015	Moved	Full	McKinley Branch	
002416	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.

Report	
	12 Month Income Analysis
	AP Aging
	AP Checks
	Branch Aging
	Credits by Reason
	Most Ordered Parts - Monthly Breakout
	RMR Analysis
	RMR By Key Data
	RMR Trending
rity tate/IT Sale	Sales by Item Type
arden State	Sales by Salesperson
	Dashboard Setup
	Time At Status Job Review
ŝ	Brian Strydesky Matthew R Sc Mark V. Cytar Roberta Ash

Ι

Last	t Month V Start Date 12/1/2	Filtering Options	nd Date 12/31/20	ns Ref	resh	oa	les by Sal	039013011							
			Formula	Filter II Add Chart				Ana	ilysis Grid						
	Graphical Depiction		Table	1 of 2 > >> Employee Code	Job Number	Install	Recurring	Percentage	Branch	Customer Number	Site Name	Address	City	State	Zipcod
							-	-				433 Running Mare			
100	0k	250	Jenkins, Carl	AE	6813-1	545.7400	0.0000		Ranier Branch	7002442	Tredwell, Fred	Rd	Monticello	AR	71656
105		200	Hart, David	AJS	32461	0.0000	60.0000		Ranier Branch	7200915	Hilb, John	32 Thunderstorm	Pine Bluff	AR	71613
			Baker, Corey	CB	6693-1	1606.5000	0.0000		Ranier Branch	7200654	Kennaugh, John	111 Trentaz Dr	Pine Bluff	AR	71611
80	05	200	Baker, Corey	CB	6788-1	3421.7100	0.0000		Ranier Branch	7000444	Kastan, Fred	76 Exhibition Ln	Pine Bluff	AR	71611
0	UN	200	Baker, Corey	CB	6787-1	1514.8300	0.0000		Ranier Branch	7001420	Bakalar, Fred	1906 Blake Ave	Pine Bluff	AR	71601
			Smith, Jim	CS	6777-1	1354.1100	45.0000		Ranier Branch	7000228	Mccammond, Fred	156 Paseo	Pine Bluff	AR	71613
			Smith, Jim	CS	6784-1	10976.7300	0.0000		Ranier Branch	7201304	Dalby, John	110 County Rd. 121	Pine Bluff	AR	71613
pios 60	OK	150 Recurring	Smith, Jim	CS	6641-1	640.0000	35.0000		Ranier Branch	7201304	Dalby, John	110 County Rd.121	Pine Bluff	AR	71613
20 20		1	Smith, Jim	CS	6834-1	338.4800	0.0000	100.0000	Ranier Branch	7201101	Flom, John	18 Buckskin Cir.	Hermitage	AR	71647
Installs :		Spi	Smith, Jim	CS	6640-1	250.0000	35.0000	100.0000	Ranier Branch	7201304	Dalby, John	110 County Road 121	Pine Bluff	AR	71613
드 40	0k	- 100 g	Smith, Jim	CS	6832-1	69.3200	0.0000	100.0000	Ranier Branch	4011436	Fbr/Acs Wagers	235 Silveriode Dr	Pine Bluff	AR	71611
			Smith, Jim	CS	32467	1153.3000	0.0000	100.0000	McKinley Branch	7002686-1	Ziff, Fred	85 Willis Place	Pine Bluff	AR	71613
			Donohoe, Charles	DD	6750-1	2635.D400	0.0000	100.0000	Ranier Branch	7004463	Bright, Tom	5307 Owl Creek Rd	Pine Bluff	AR	71613
20	0k 🚽	50	Donohoe, Charles	DD	6697-1	2812.6600	0.0000	100.0000	Ranier Branch	7004310	Fedor, Tom	520 S Original St	Pine Bluff	AR	71611
			Johnson, Fred	KH	6831-1	488.1500	0.0000	100.0000	Ranier Branch	7006309	Schlesinger, Tom	1103 Waters Ave	Pine Bluff	AR	71611
			Johnson, Fred	кн	6605-1	670.1800	0.0000	100.0000	Ranier Branch	7005017	Molinero, Tom	1313 W Buttermilk Rd	Pine Bluff	AR	71611
0	OK	0	Johnson, Fred	KH	6782-1	4029.3300	0.0000	100.0000	Ranier Branch	7002495	Van Straaten, Fred	230 Lake Ave	Pine Bluff	AR	71611
	enkins, Carl Hart, David aker, Corey Smith, Jim oe, Charles inson, Fred	an, Steve	Johnson, Fred	КН	6805-1	3299.3900	0.0000	100.0000	Ranier Branch	7201006	Dunigan, John	200 Difficult Ln	Pine Bluff	AR	71611
	S H L L L L L L L L L L L L L L L L L L	S.	Costas, Kathy	PB	32462	235.0000	45.0000	100.0000	Ranier Branch	7201296	Crystal, John	319 W. Bleeker St.	Pine Bluff	AR	71611
	Jenkins, Carl Hart, David Baker, Corey Smith, Jim Johnson, Fred Costas, Kathy	a mar	Costas, Kathy	PB	32466	235.0000	40.0000	100.0000	McKinley Branch	7201302	D'agostino, John	41 Foal Cir	Banks	AR	71631
	Jenk Ha Bake Sr Sn Johns Costa	Hoffman, Ke	Costas, Kathy	PB	32460	235.0000	45.0000	100.0000	Ranier Branch	7201292	Crown, John	33 Fall Creek Rd	Pine Bluff	AR	71611
	ã :		Costas, Kathy	РВ	32468	235.0000	45.0000	100.0000	Ranier Branch	7201306	Damaso, John	101 Burnt Mountain Dr	Pine Bluff	AR	71613
stalls F	Recurring		Costas, Kathy	PB	32469	0.0000	45.0000	100.0000	Ranier Branch	7201308	Danell, John	255 Gold River Ct	Pine Bluff	AR	71613
			Holmes, Rebecca	RD	6746-1	10847.6300	0.0000	100.0000	Ranier Branch	7000947	Diffenbaugh, Fred	32 E. Pasture Lane	Monticello	AR	71656
			Holmes, Rebecca	RD	6789-1	3471.0400	0.0000	100.0000	Ranier Branch	7000679	Gilanders, Fred	1419 Crystal Lake Rd	Pine Bluff	AR	71611
			Holmes, Rebecca	RD	6803-1	9190.4100	0.0000	100.0000	Ranier Branch	7201253	Coates, John	255 Hunter Creek Rd	Pine Bluff	AR	71611
			Holmes, Rebecca	RD	6807-1	2085.1000	49.9900	100.0000	Ranier Branch	7200857	Guth, John	0531 County Rd 153	Pine Bluff	AR	71613
			Holmes, Rebecca	RD	6817-1	580.6500	45.0000	100.0000	Ranier Branch	7201299	Cunniffe, John	150 N. 8th St	Pine Bluff	AR	71611
			Holmes, Rebecca	RD	5777-1	607.1500	0.0000	100.0000	Ranier Branch	7200576	Horvath, John	1649 High Aspen Dr	Pine Bluff	AR	71601
			Holmes, Rebecca	RD	6773-1	4888.4000	0.0000	100 0000	Ranier Branch	7000947	Diffenbaugh, Fred	130 Aspen Valley Ranch	Monticello	AR	71656

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

		c	Credits by (	Credit Rea	ison		
his Month 🔽 Job, Service, Cycle, Other misc 🛡 Start Date 1/1/2016	End Date	1/31/2016	Refres	h Show It	em Type Detail		
		с	redits By Reas	son Custome	r Appeasement	For Type 'J','	s','C','O'
	€€ € 2 →						
	Credit_Number	Credit_Date	Amount	Туре	Branch_Code	Category_Code	Customer
Clicking on these produces further	508972	1/22/2016	47.54	Service	Ranier	Service	7000018 - Crinch, Fred
drill-down	508222	1/5/2016	49.50	Service	Ranier	Service	7001795 - Oppenheim, Fred
Credits By Reason	509029	1/25/2016	281.06	Service	Ranier	Service	7002388 - Swartz, Fred
·	508283	1/12/2016	131.04	Other Misc	Ranier	Service	7004553 - Carrico, Tom
4,289.55	508319	1/19/2016	85.00	Service	Ranier	Service	7200031 - Thibault, Tom
4,865,65	508257	1/11/2016	85.00	Service	Ranier	Service	7201147 - Brien, John
4,003,03	508209	1/5/2016	456.25	Service	Ranier	Service	7201204 - Carrico, John
	509087	1/29/2016	126.00	Cycle	Ranier	G&A	4012467 - Rocky Mountain Institute
229.00	508321	1/19/2016	80.20	Cycle	Ranier	G&A	7000506 - Klesh, Fred
	508322	1/19/2016	108.00	Cycle	Ranier	G&A	7001386 - Anda, Fred
	508320	1/19/2016	474.24	Cycle	Ranier	G&A	7001467 - Becker, Fred
14.627.64	509081	1/28/2016	370.81	Cycle	Ranier	G&A	7001678 - Mosle III, Fred
14,027.04	508323	1/19/2016	87.00	Cycle	McKinley	G&A	7002910 - Mecarroll, Tom
	509086	1/29/2016	90.00	Cycle	Ranier	G&A	7200675 - Klesh, John
Acctg Adjustment 📕 Billing Error 🦰 Clear Balance 📕 Customer Appeasement Installation Error	509077	1/27/2016	150.00	Cycle	Ranier	G&A	7201171 - Burnstine, John

## 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.

al dam - () lookustee			
	SedonaOffice	WebLogin	
	Santana		
	fatter (MAR) 247-00 Copyright 20	antington Trand, Chapton (Alto, Str. Heller) 1. Danateri ("Alto Alto Patrica Station") 1. Presentar Substate, Inc.	

## **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**

RMR By Key	Data	0	RMR Attrition Chart (by Billing	Service Profit Loss Chart (with	Individual
Key	Data	Monthly	Cycle)	COM/RES Split) Rename	Visualizations
Cycle Cycle Cycle Cycle Branch Branch Branch Branch Branch Masters vSubs Masters vSubs Alarm Company Alarm Company Alarm Company Alarm Company	Annual Semi-Annual Ouarterly Monthy All Points Security Carden State PSSST Subs Carden State/IT Sales PSSST Subs Affiliated Affiliated Alarmoom Annest Cancel	20,236.36 2,285.93 88,202.47 5,331.69 408.35 184.48 112,006.37 0.00 3,457.25 40,00 116,016.45 23,00 205.35 111,887.15 20,25 96.45 902.14	Sum of RMR by Month (500.00) (51,000.00)	Ticket Profit-Loss Result	may be removed by clicking on the icon next to the title of the visualization and selecting
Alarm Company Alarm Company Alarm Company Alarm Company Alarm Company Alarm Company Alarm Company Alarm Company Alarm Company Alarm Company INFO DE	CCTV Local Monital N/A Pending Sentry Net STAR LINK Suspend Un Bch	345.75 242.53 624.90 774.12 22.10 565.26 301.20 15.75 30.50 0.00	12 Month Income Analysis Chart	and a second sec	the option Remove.

## **Renaming Visualizations**

MR By Key	Data	(3)	RMR Attrition Chart (by Billing	Service Profit Loss Chart (with
Кеу	Data	Monthly	Cycle)	COM/RES Split)
Cycle	Annual	20,236.36	Sum of DMD by Month	Ticket Profit-Loss Result
Cycle	Semi-Annual	2,285.93	Sum of RMR by Month	TICKET PTOTTE-LOSS Result
Cycle	Quarterly	88,202.47	\$0.00	Totals
Cycle	Monthly	5,331.69		\$15,000.00 (\$10,000.00)
Branch	A&M Security	408.35	2 (\$500.00)	
Branch	All Points Security	184.48	(0.0.002) (0.0.002)	₹ 5 (\$10,000.00)
Branch	Garden State	112,006.37	◄ (\$1,000.00)	Salat of Ar & Salat
Branch	Garden State/IT Sales	0.00	17. AN	660000000000000000000000000000000000000
Branch	PSSST	3,457.25	(\$1,500.00)	
Masters vs Subs	Masters	40.00		Month
Masters vs Subs	Subs	116,016.45	~667676767676767676767676767	RES - No Charge Ticket
Alarm Company	* Amcest 800-632-7370	23.00	Month	RES - Ticket Showing a Loss
Alarm Company	Access	205.35		RES - Ticket Showing a Profit COM - No Charge Ticket
Alarm Company	Affiliated	111,887.15	A Q M S	COM - Ticket Showing a Loss COM - Ticket Showing a Profit - Net Result
Alarm Company	Alarm.com	20.25		COM - HERE SHOWING & Profit - Net Result
Alarm Company	Amcest	96.45	INFO DETAILED REPORT	
Alarm Company	Cancel	902.14		INFO DETAILED REPORT
Alarm Company	CCTV	345.75		
Alarm Company	Local	242.53	12 Marth Income Analysis Obart	
Alarm Company	Monital	624.90	12 Month Income Analysis Chart	
Alarm Company	N/A	774.12	500k	
Alarm Company	Pd	22.10	250k	
Alarm Company	Pending	565.26		
Alarm Company	Sentry Net	301.20	0k	
Alarm Company	STAR LINK	15.75		
Alarm Company	Suspend	30.50	-250k	
Alarm Company	Un Bch	0.00	uniante juliante jusante segunte octate	horizone persone person response herizon

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 <sup>(2)</sup> 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

New Tab New Tab	New Tab	Gallery         SectoraOffice •         Sort By         Newest •           12 Month Income Analysis         Twelve month view of income versus expenses in a text only format           Add		
		12 Month Income Analysis Chart Twelve month view of Income versus expenses in a stacked bar graph Add		
		AR Aging Bar Chart Bar graph of current AR Aging Add	I	
		AR Aging AR Aging in a text only format		

To add additional tabs, press the  $\square$  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**

RMR By Key	Dat Rename Ta		RMR Attrition Chart (by Billing @ Cycle)	Service Profit Loss Chart (with @ COM/RES Split)
Cycle Cycle Cycle	Annual Semi-Annu Quarterly	88,202.47	Sum of RMR by Month	Ticket Profit-Loss Result Totals
Cycle Branch	Monthly A&M Security	5,331.69 408.35	ی (\$500.00) کې د (\$5	Ling \$15,000.00 \$1,000,000 \$1,000,000 \$1,000,000 \$1,000,000 \$1,000,000 \$1,000,000 \$1,000,000,000,000,000,000,000,000,000,0
Branch Branch	All Points Security Garden State	184.48 112,006.37	(300.00) (30	「 (\$10,000.00) 後記を気みが火火を発送るためのか
Branch Branch	Garden State/IT Sales PSSST	0.00 3,457.25	(\$1,500.00)	1 6 6 6 6 6 8 8 8 6 6 6 6 8 8 6 6 6 6 6
Masters vs Subs Masters vs Subs	Masters Subs	40.00 116,016.45	29999799999999999999999999999999999999	RES - No Charge Ticket
Alarm Company Alarm Company	* Amcest 800-632-7370 Access	23.00 205.35	Month	RES - Ticket Showing a Loss RES - Ticket Showing a Profit COM - No Charge Ticket
Alarm Company Alarm Company	Affiliated Alarm.com	111,887.15 20.25		COM - Ticket Showing a Loss COM - Ticket Showing a Profit — Net Result
Alarm Company Alarm Company	Amcest Cancel	96.45 902.14	INFO DETAILED REPORT	INFO DETAILED REPORT
Alarm Company	CCTV	345.75		

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?		
	ОК	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 <sup>3</sup> 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.

