TRACKER DASHBOARD USER GUIDE

Version 1.0

DOCUMENT CONTROL

Document

Tracker Dashboard User Guide

Current Version

Version	Date	Issued Pages	Reason For Issue
1.0	Nov 2013	All	First issue

Previous Versions

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CONTENTS

1. INTRODUCTION TO DASHBOARDS

1.1 Introduction

Tracker Dashboard automates the emailing of statistics, facts and figures from Tracker or Alpha Tracker to individuals and groups within an organisation. Typically, Tracker Dashboard is used to generate emails overnight with "dashboards" of key data for managers and directors, and live "action lists" for processing teams.

The following examples show the type of information you might want to include in Tracker Dashboard emails:

- daily/weekly/monthly sales dashboards with:
    - top 10 clients
    - quote values
    - quote success percentage by work type, office and sales person
    - comparisons with previous month/year
- operations dashboards for the lab showing:
    - samples to be analysed
    - samples overdue
- operations dashboards for the admin team listing:
    - surveys awaiting production
- operations dashboards for the accounts teams displaying:
    - projects ready to invoice
- management information for the surveying manager comparing:
    - surveyor's statistics in terms of throughput
    - surveyor's statistics in terms of percentage of positive samples
- management information for the finance manager showing:
    - turnover against target
- management information for the directors displaying:
   - KPIs based on milestones in their areas of the business.

Anything captured in Tracker can be used in a dashboard. The emails themselves can include CSV attachments or formatted tables of data. They can also include graphs and charts if the data being queried is suitable for this format. In addition, colour-coded dashboards enable you to highlight figures which are above or below target in green or red.

> ✏️ *Tracker Dashboard is for use by system administration users with suitable technical knowledge only.*

start software

1.2 Identifying the Dashboard files

The file that controls Tracker Dashboard is called "dashboard.mdb". To make changes to any of your dashboards you need to open and edit dashboard.mdb in Access. When this file is open in Access, your screen will look similar to that below:
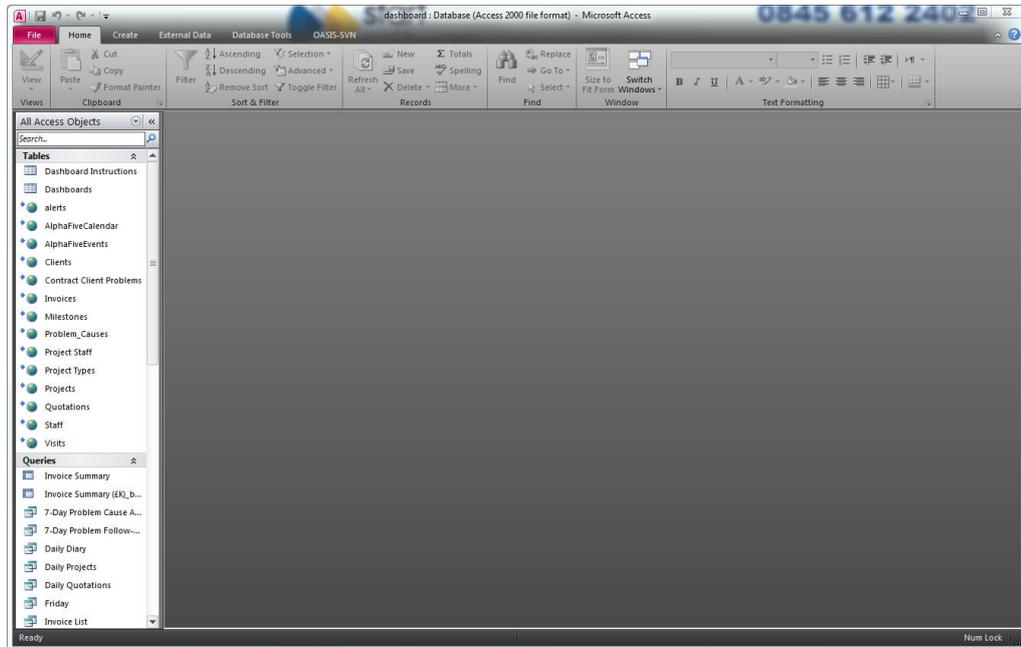
There are two important control tables in dashboard.mdb, these are:

- Dashboards – which determines the dashboards sent
- Dashboard Instructions –which determines what is in the dashboard.

You can see these two tables at the top of the Tables list on the left-hand side of the screen. You can also see linked tables to the SQL database plus queries which generate the data to be included in the dashboards.

2.   MAINTAINING DASHBOARD TABLES

2.1   Introduction

The following sections describe how you can maintain your dashboards by making changes to the Dashboards and Dashboard Instructions tables.

2.2   Maintaining the Dashboards table

The Dashboards table controls the dashboard emails that are sent out and also when they are sent. You can edit the details of existing dashboard emails on the Dashboards table.

To maintain a dashboard:

1. Open dashboard.mdb in Access.

2. Double click on the Dashboards table to open it.

    The Dashboards table is displayed, listing the existing dashboards, for example:

3. Click on the row you want to amend and complete the fields as follows:
    - ID – this is completed automatically
    - Name – the title of the dashboard email
    - Run Time – specifies the day/date and time on which the dashboard email is sent.
        - If the email is to be sent every day then no day needs to be specified, only the time, for example:
          "16:45" or "07:01".
        - If the email is to be sent on a specific date each month, then the date and the time need to be specified, for example:
          "01 07:00"
          would be sent at 7am on the first of each month.

- – If the email is to be sent on a specific day each week, then the day and time need to be specified, for example
    "Fri 11:00" or "Mon 06:00"

    – If the email is to be sent on multiple days, then separate each day by using a slash ("/"), for example:
    "/Mon 07:00/Tue 07:00/Wed 07:00/Thu 07:00/Fri 07:00/"

- Staff list – specifies the Staff ID of the member of staff who is to receive the email, for example:
    "177"

    – If the email is to be sent to multiple members of staff, then separate each Staff ID by using a slash ("/"), for example:
    "/177/185/189/194/202/"

- Query name – if the dashboard contains data from just one query, put the query name here and it will be sent as a CSV attachment

- Notes – these notes appear at the top of the email

- Send if no data – this tickbox indicates whether the dashboard email should be sent if there is no data in it.

4. Close the Dashboards table when you have completed all the details. Your new dashboard will be saved automatically.

2.3   Maintaining the Dashboard Instructions table

The Dashboard Instructions table determines the content of your dashboards. You can edit the details of existing dashboard queries on the Dashboard Instructions table and you can also create new dashboard queries by adding records to the Dashboard Instructions table.

To specify dashboard instructions:

1. Open dashboard.mdb in Access.

2. Double click on the Dashboard Instructions table to open it.

    The Dashboard Instructions table is displayed, listing the existing dashboard queries:

3. Click on the row you want to amend or the row marked "(New)" at the bottom of the list of dashboards if you want to add a dashboard query and complete the fields as follows:

- ID – this is completed automatically

- Dashboard ID – links to the Dashboards table, to specify the dashboard to which this instruction relates

- Query Name – the name of the Access query

- Sort – where this data should appear in the dashboard (1 at the top, 2 next and so on)

- Headings – tick to indicate whether the data from this query should appear with headings and auto totals for numeric fields

- Filter by Staff ID – tick if you want the query to be filtered so that it includes particular data for the recipient (for example, only their actions, not actions for other people).

  You need to put a column in the query called "Owner" with the name of the person to be filtered by and that person must be a dashboard recipient – or else they won't get the email at all!

- Notes – text to appear with the data in the email

- Group by Col 1 – groups the data by the first column with a column heading.

4. Note the following special cases:

- If a query name ends with "_bar" or "_pie" or "_line" the data will be presented as a pie chart or bar chart or line chart.

- If a field name ends with "_nototal" the dashboard will not try to total the field.

5. Close the Dashboard Instructions table when you have completed your amendments to the details. Your dashboard instructions will be saved automatically.