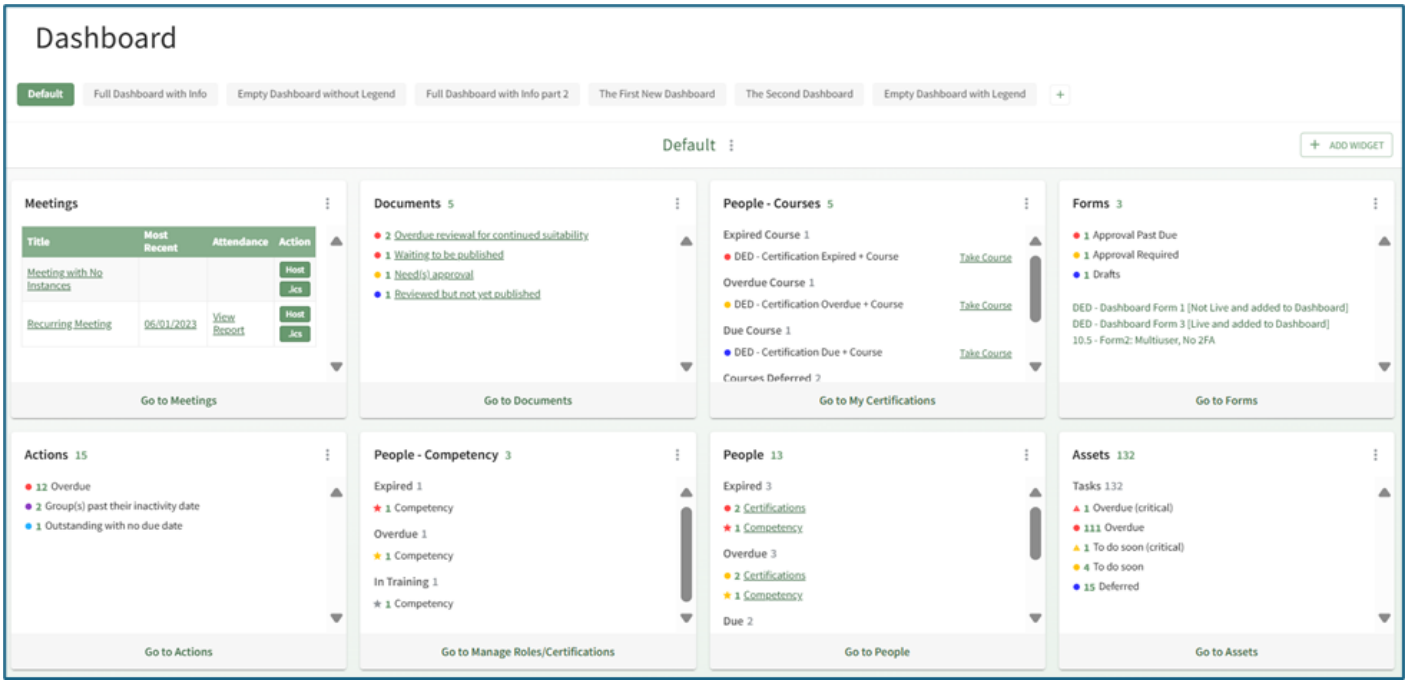
The Dashboard

- Default Dashboard Summary
- Dashboard Context Menu Explanations
- Overview of Widgets
- Module Summary Widget Explanation
- Chart Wizard Explanation

Default Dashboard Summary

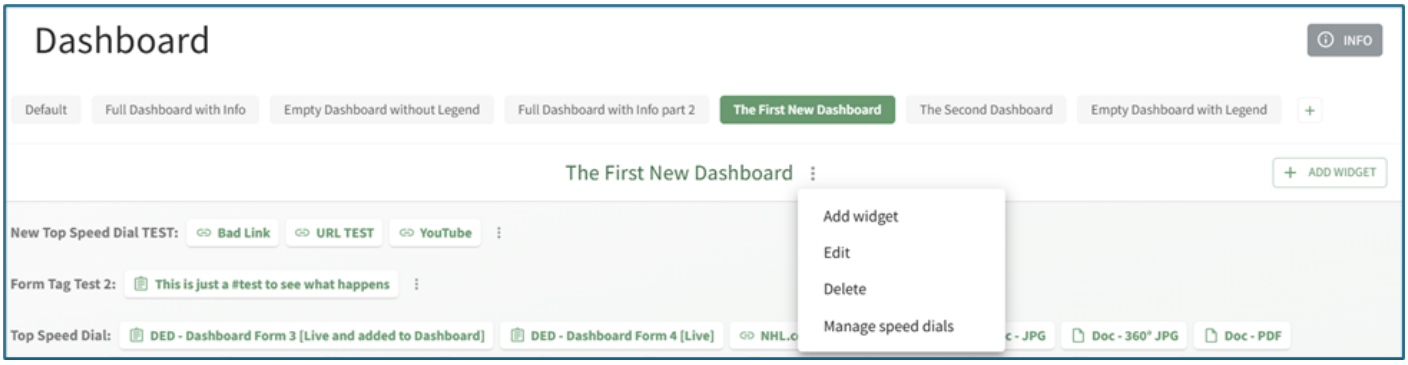
The default dashboard displays eight Widgets: People, Assets, Documents, Forms, Actions, People-Competency, People-Courses, and Meetings. Each widget is a summary of relevant information from that specific module. The placement of these module summaries can be customized by dragging and dropping widgets into your individual preference.

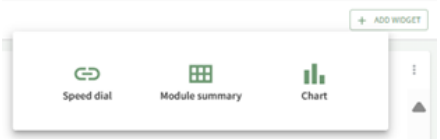
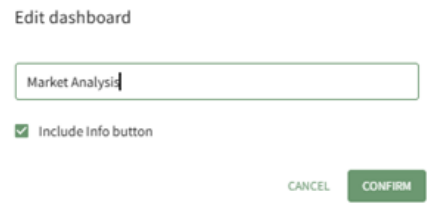
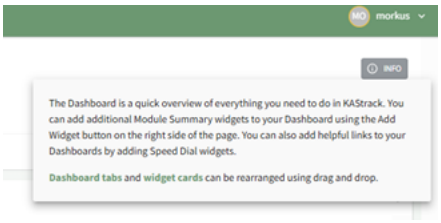


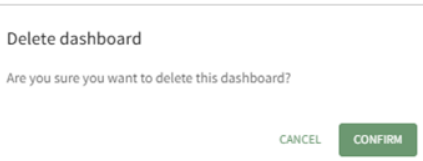
> In order to unpin widgets from the default dashboard, KAStrack requires you to create a new dashboard first.

Dashboard Context Menu Explanations

To the right of a dashboard title is a vertical three dot menu that opens a context menu with options to Add Widget, Edit, Delete, Manage Speed Dials.



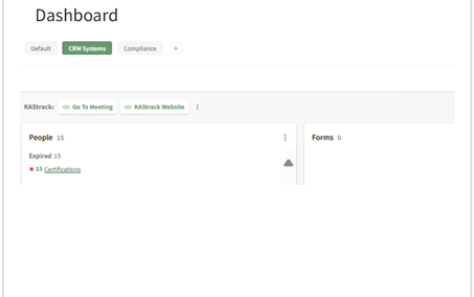
Dashboard Context Menu Explanations		
Option	**Explanation**	**Image**
Add Widget	Selecting “Add Widget” from the dashboard context menu opens the Add Widget Modal on the right-hand side of the screen and has the same function as selecting the “Add Widget” button on the screen’s right side (or in the center of an empty Dashboard).	
Edit	Selecting “Edit” from the dashboard context menu opens the Edit Dashboard Modal, allowing an individual to alter the dashboard name.	
	Deselecting the “Include Info button” checkbox will remove the grey “INFO” button from the top right-hand corner of the dashboard.	

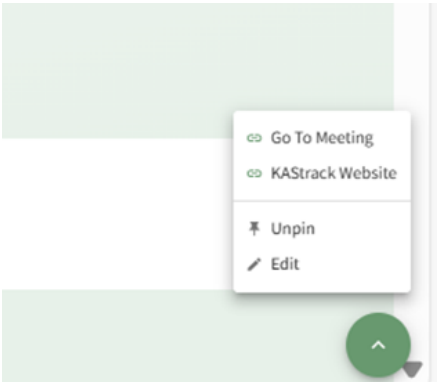
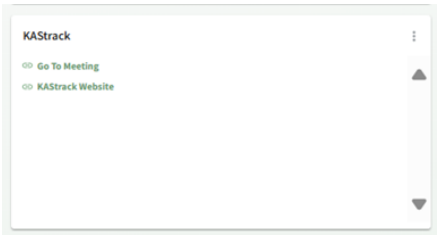
Delete	Selecting “Delete” from the dashboard context menu will open the Delete Dashboard Modal. > You can only delete the Default Dashboard after creation of a new Dashboard. If all Dashboards are deleted, KAStrack will automatically regenerate a new Default Dashboard.	
Manage Speed Dials	Selecting “Manage Speed Dials” from the dashboard context menu will open the Manage Speed Dial Modal. From this modal, an individual can create, edit and delete speed dials.	

Overview of Widgets

The Dashboard is comprised of speed dials and widgets. Speed dials allow you to establish links to KAStrack Documents, Forms, and even URLs, so that you can easily access desired webpages (including webpages outside of the KAStrack system). Widgets highlight module summaries or charts representing report information.

A detailed explanation of speed dials, module summary widgets and chart widgets is provided in the tables below.

Speed Dial Explanation Table		
• Speed dials are a dashboard feature used to add relevant quick links to frequently needed Documents, Forms, and websites. • Speed dials can be displayed three ways: in a horizontal row at the top of a screen, a floating expandable icon, and as a widget. • Speed dials cannot be dragged and dropped to reorder them. Instead, they display in the order in which they are pinned to a Dashboard. To change their order, simply unpin and re-add them in the order you wish to have them display.		
Placement Options	**Explanation**	**Images of Placement Location**
Disabled	When placement is marked as disabled, the speed dials will no longer show on the dashboard. Disabled unpins the speed dial from the dashboard without deleting record of it from the Module.	
Top	• A speed dial with a top placement shows immediately under the page header. • The vertical three dot icon opens a context menu with the options to edit or unpin.	

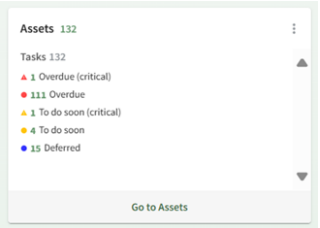
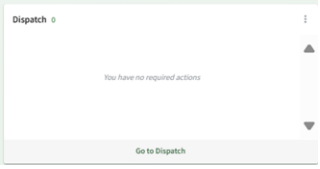
Floating	• A speed dial with floating placement is shown as an up arrow icon in the bottom right hand corner that expands when clicked. • The context menu shows below links when a floating speed dial is expanded, as well as options to edit and unpin.	
Widget	• A speed dial with widget placement will show within the grid of module. • The vertical three dot icon opens a context menu with the options to edit or unpin.	

Module Summary Widget Explanation

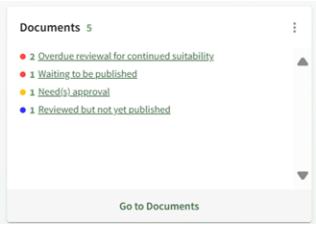
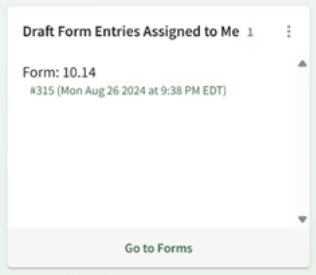
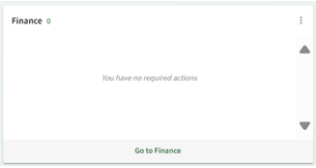
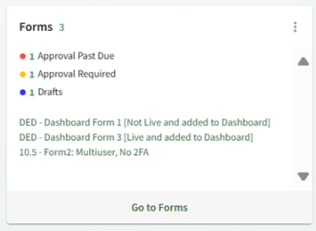
Module Summary Widget Explanation Table

- Module Summaries are widgets that summarize all relevant and time sensitive information within specific modules and present it in a condensed format.
- The widget header in bold identifies the Module being summarized. The first number to the right of the header indicates the number of outstanding or past due actions/ tasks / documents, etc. relevant to the user. If the user is a supervisor/admin, the second number (in parentheses) shows the total number of outstanding actions for the supervisor/admin plus that of all users that report to the supervisor/admin.
- The vertical three dot icon opens a context menu with the singular option to Unpin.

> On a mobile device accessing the web version of KAStrack, additional options will show in the context menu, allowing the user to rearrange the ordering of the widgets within the widget grid.

Module	Comments		Image
Actions	Module Summary Widget Key		
		Overdue	
		Nearing due date	
		Group(s) past inactivity date	
		Outstanding with no due date	
		Outstanding	
Assets	Module Summary Widget Key		
		Overdue critical item task	
		Overdue task	
		Critical item task due soon	
		Task due soon	
		Deferred Task	
Dispatch	Module Summary Widget Key		

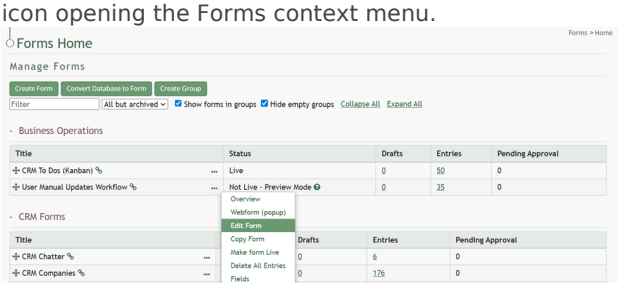
	To go to scheduled status
	To go to ready to dispatch status
	To go to dispatched status
	To go to completed status
	To go to cancelled status
	To go to archived status

Documents	Module Summary Widget Key		
		Overdue continued suitability review	
		Waiting to be published	
		Need(s) approval	
		Require(s) acknowledgement/approval	
		Reviewed but not yet approved	
		Notification(s) of new revisions	
Drafts Form Entries Assigned to Me	Forms can be designed to allow users to save their current work as a draft, giving them the option to come back to an entry and complete it at a later time. If a user has any active Draft Entries assigned to their account, they can be accessed through a quick link in the Draft Form Entries Assigned to Me Module Summary.		
Finances	Module Summary Widget Key		
		Outstanding Budget Items	
		Pending Approvals	
Forms	Module Summary Widget Key		
		Approval past due	
		Approval required	
		Drafts	

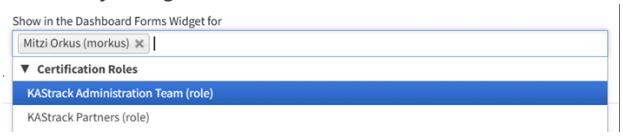
> At the bottom of the Forms Module Summary Widget, forms attached to the dashboard are shown as quick links for ease of access. This is set in the Form's settings by its creator or an Admin.

How To: Add Forms to the Forms Module Summary Widget

To add a specific form so that it is displayed on specific user's the Forms Module Summary dashboard widget, go to the Form you want included on the Home Page of the Forms Module. Select the three-dot icon opening the Forms context menu.



Select "Edit Form" opening the Edit Form Modal and go to the Advanced Settings section.
Input the users or certification roles you wish to see the selected form in their Dashboard Forms Module Summary Widget.



Select "Save" and the form will now be visible on the dashboard to the selected users.

Kanban		All To Do Notifications in Kanban	 Kanban Module Summary
	The Kanban Module Summary cannot be customized. Each board will show with the total number of to dos associated with it.		
	Each Kanban Board can have their own individual Module Summary, which can be customized at the Kanban level. Changes to the Board Module Summary will show to all who add the widget. Coming Soon: How To Customize a Kanban Board Module Summary Widget		 Customizable Kanban Board Module Summary

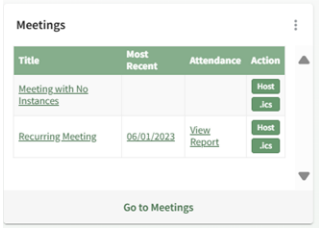
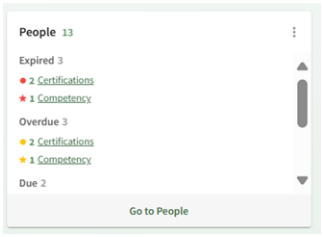
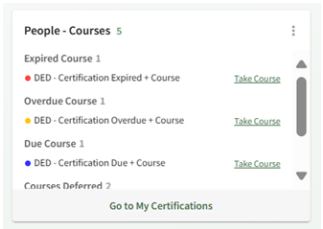
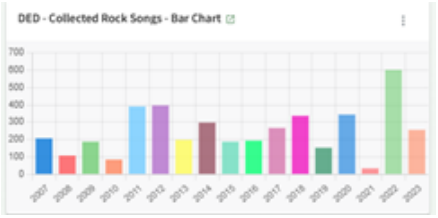
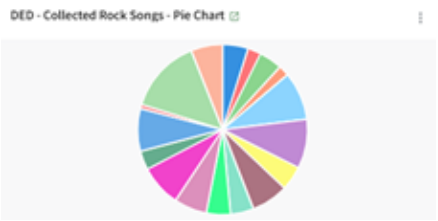
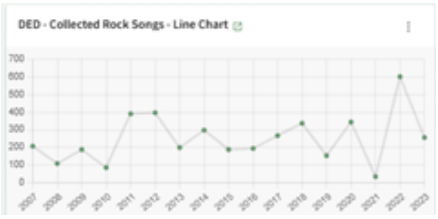
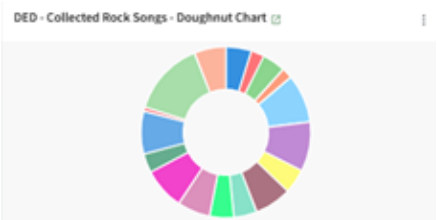
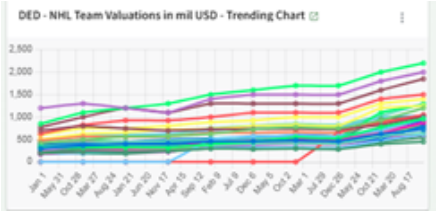
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</td></tr>
<tr><td colspan="2">Meeting with no Instances</td></tr>
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<tr><td></td><td>Expired Certification</td></tr>
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<tr><td></td><td>Overdue Competency</td></tr>
<tr><td></td><td>Due Certification</td></tr>
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<tr><td></td><td>Due Courses</td></tr>
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</table>

Chart Wizard Explanation

Chart Widget Explanation Table		
The widget header in bold identifies the chart title and the chart type. The vertical three dot icon to the right opens a context menu with the options to View Chart and Unpin.		
Charts	**Type and Recommended Usage**	**Image**
Representative	Bar Chart: Recommended when comparing quantities across different categories	
	Horizontal Bar Chart: Recommended when comparing quantities across different quantities	
	Pie Chart: Recommended when showing composition and parts of a whole	
	Line Chart: Recommended when showing continuous data trends over time	
	Doughnut Chart: Recommended when showing parts of a whole and highlighting a total or key metric in the center	
Trending	Line Chart: Recommended when emphasizing patterns and direction of change	

Empty Chart	If you see a chart but no data appears, confirm that the value column contains numeric values.	
	If a chart widget does not show a chart, it is because you do not have authorization to view that data.	