

# The Dashboard

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# 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.

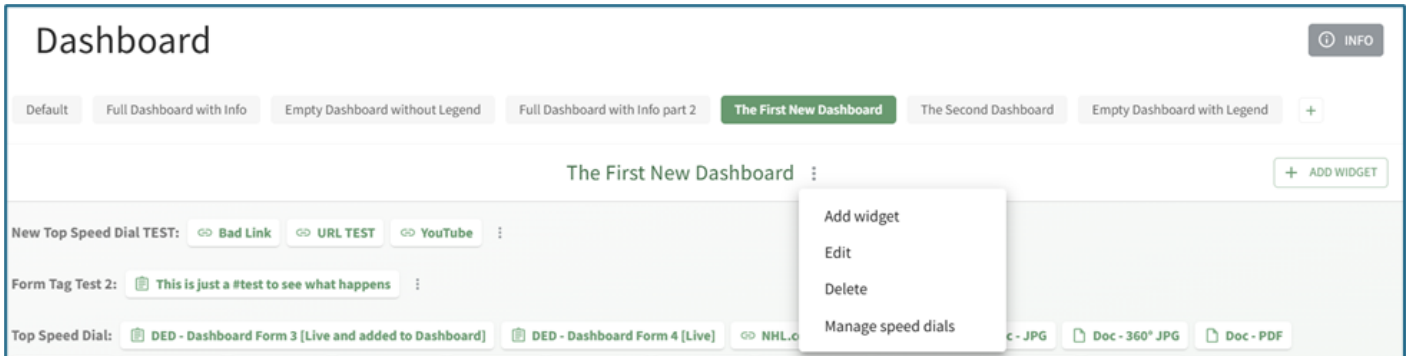
The screenshot shows the 'Default' dashboard with the following widgets:

- Meetings**: A table with columns 'Title', 'Most Recent', 'Attendance', and 'Action'. It lists 'Meeting with No Instances' and 'Recurring Meeting'.
- Documents**: 5 items, including 'Overdue review for continued suitability', 'Waiting to be published', 'Need(s) approval', and 'Reviewed but not yet published'.
- People - Courses**: 5 items, including 'Expired Course 1', 'Overdue Course 1', and 'Due Course 1'.
- Forms**: 3 items, including 'Approval Past Due', 'Approval Required', and 'Drafts'.
- Actions**: 15 items, including 'Overdue', 'Group(s) past their inactivity date', and 'Outstanding with no due date'.
- People - Competency**: 3 items, including 'Expired', 'Overdue', and 'In Training'.
- People**: 13 items, including 'Expired', 'Overdue', and 'Due'.
- Assets**: 132 items, including 'Overdue (critical)', 'Overdue', 'To do soon (critical)', 'To do soon', and 'Deferred'.

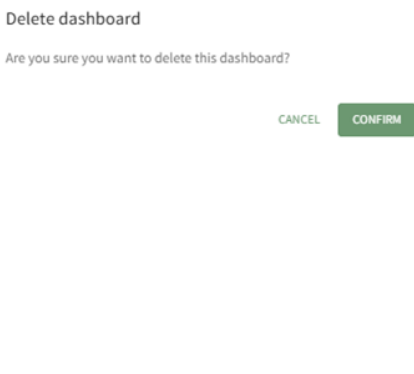
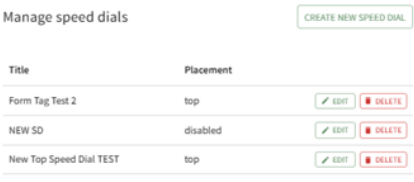
In order to unpin widgets from the default dashboard, KAStrack requires you to create a new dashboard first.

# 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.



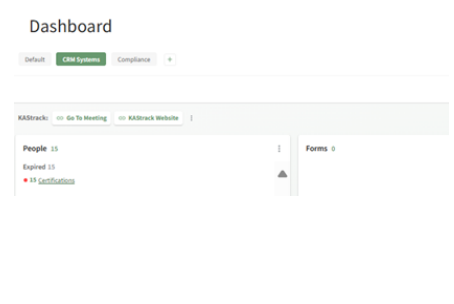
Dashboard Context Menu Explanations		
Option	Explanation	Image
Add Widget	Selecting “Add Widget” from the dashboard context menu opens the Add Widget Modal on the right-hand side of the screen and has the same function as selecting the “Add Widget” button on the screen’s right side (or in the center 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.	

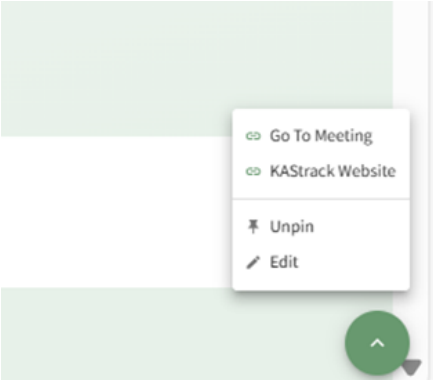
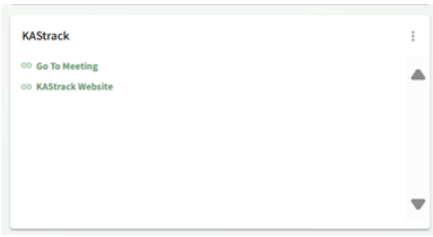
<p>Delete</p>	<p>Selecting “Delete” from the dashboard context menu will open the Delete Dashboard Modal.</p> <p>You can only delete the Default Dashboard after creation of a new Dashboard. If all Dashboards are deleted, KAStack will automatically regenerate a new Default Dashboard.</p>																	
<p>Manage Speed Dials</p>	<p>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.</p>	 <table border="1"> <thead> <tr> <th>Title</th> <th>Placement</th> <th>EDIT</th> <th>DELETE</th> </tr> </thead> <tbody> <tr> <td>Form Tag Test 2</td> <td>top</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>NEW SD</td> <td>disabled</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>New Top Speed Dial TEST</td> <td>top</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Title	Placement	EDIT	DELETE	Form Tag Test 2	top	<input type="checkbox"/>	<input type="checkbox"/>	NEW SD	disabled	<input type="checkbox"/>	<input type="checkbox"/>	New Top Speed Dial TEST	top	<input type="checkbox"/>	<input type="checkbox"/>
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New Top Speed Dial TEST	top	<input type="checkbox"/>	<input type="checkbox"/>															

# Overview of Widgets

The Dashboard is comprised of speed dials and widgets. Speed dials allow you to establish links to KAStack Documents, Forms, and even URLs, so that you can easily access desired webpages (including webpages outside of the KAStack 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		
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	<ul style="list-style-type: none"><li>A speed dial with a top placement shows immediately under the page header.</li><li>The vertical three dot icon opens a context menu with the options to edit or unpin.</li></ul>	








Floating	<ul style="list-style-type: none"><li>• A speed dial with floating placement is shown as an up arrow icon in the bottom right hand corner that expands when clicked.</li><li>• The context menu shows below links when a floating speed dial is expanded, as well as options to edit and unpin.</li></ul>	 A screenshot showing a floating speed dial in the bottom right corner of a page. The speed dial is a green circle with a white upward-pointing arrow. A context menu is open above it, listing two links: "Go To Meeting" and "KAStack Website". Below the links are two options: "Unpin" (with a pin icon) and "Edit" (with a pencil icon).
Widget	<ul style="list-style-type: none"><li>• A speed dial with widget placement will show within the grid of module.</li><li>• The vertical three dot icon opens a context menu with the options to edit or unpin.</li></ul>	 A screenshot showing a widget speed dial within a grid. The speed dial is titled "KAStack" and contains two links: "Go To Meeting" and "KAStack Website". A vertical three-dot menu icon is in the top right corner of the widget. A context menu is open to the right of the widget, showing "Unpin" and "Edit" options.








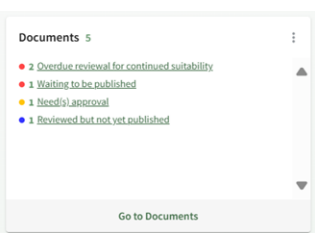



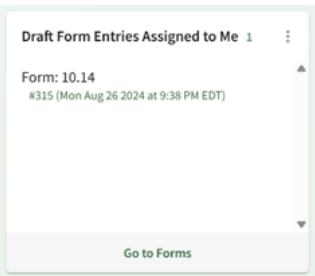




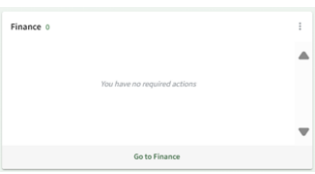








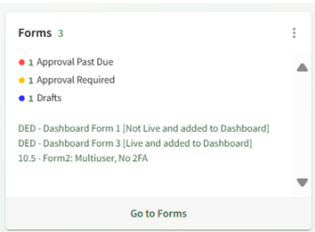



# Module Summary Widget Explanation

**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 KAStack, additional options will show in the context menu, allowing the user to rearrange the ordering of the widgets within the widget grid.

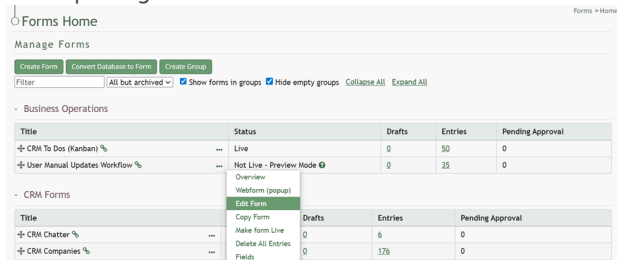
Module	Comments	Image
Actions	Module Summary Widget Key	
		Overdue
		Nearing due date
		Group(s) past inactivity date
		Outstanding with no due date
		Outstanding
Assets	Module Summary Widget Key	
		Overdue critical item task
		Overdue task
		Critical item task due soon
		Task due soon
		Deferred Task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

	<p>To go to scheduled status</p> <p>To go to ready to dispatch status</p> <p>To go to dispatched status</p> <p>To go to completed status</p> <p>To go to cancelled status</p> <p>To go to archived status</p>							
Documents	<p>Module Summary Widget Key</p> <table border="1"> <tr> <td data-bbox="448 421 794 573">  </td> <td data-bbox="794 421 1150 573"> <p>Overdue continued suitability review</p> <p>Waiting to be published</p> </td> </tr> <tr> <td data-bbox="448 573 794 656">  </td> <td data-bbox="794 573 1150 656"> <p>Need(s) approval</p> </td> </tr> <tr> <td data-bbox="448 656 794 947">  </td> <td data-bbox="794 656 1150 947"> <p>Require(s) acknowledgement/approval</p> <p>Reviewed but not yet approved</p> <p>Notification(s) of new revisions</p> </td> </tr> </table>		<p>Overdue continued suitability review</p> <p>Waiting to be published</p>		<p>Need(s) approval</p>		<p>Require(s) acknowledgement/approval</p> <p>Reviewed but not yet approved</p> <p>Notification(s) of new revisions</p>	
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	<p>Need(s) approval</p>							
	<p>Require(s) acknowledgement/approval</p> <p>Reviewed but not yet approved</p> <p>Notification(s) of new revisions</p>							
Drafts Form Entries Assigned to Me	<p>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.</p>							
Finances	<p>Module Summary Widget Key</p> <table border="1"> <tr> <td data-bbox="448 1335 794 1435">  </td> <td data-bbox="794 1335 1150 1435"> <p>Outstanding Budget Items</p> </td> </tr> <tr> <td data-bbox="448 1435 794 1514">  </td> <td data-bbox="794 1435 1150 1514"> <p>Pending Approvals</p> </td> </tr> </table>		<p>Outstanding Budget Items</p>		<p>Pending Approvals</p>			
	<p>Outstanding Budget Items</p>							
	<p>Pending Approvals</p>							
Forms	<p>Module Summary Widget Key</p> <table border="1"> <tr> <td data-bbox="448 1581 794 1682">  </td> <td data-bbox="794 1581 1150 1682"> <p>Approval past due</p> </td> </tr> <tr> <td data-bbox="448 1682 794 1765">  </td> <td data-bbox="794 1682 1150 1765"> <p>Approval required</p> </td> </tr> <tr> <td data-bbox="448 1765 794 1843">  </td> <td data-bbox="794 1765 1150 1843"> <p>Drafts</p> </td> </tr> </table>		<p>Approval past due</p>		<p>Approval required</p>		<p>Drafts</p>	
	<p>Approval past due</p>							
	<p>Approval required</p>							
	<p>Drafts</p>							

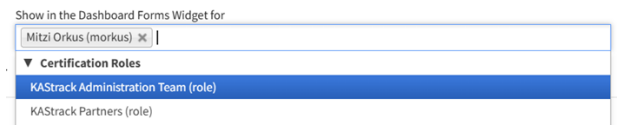
At the bottom of the Forms Module Summary Widget, forms attached to the dashboard are shown as quick links for ease of access. This is set in the Form's settings by its creator or an Admin.

### 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

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.

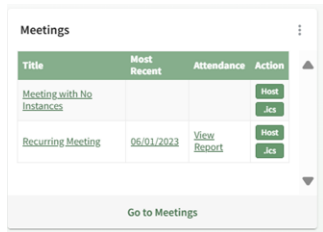








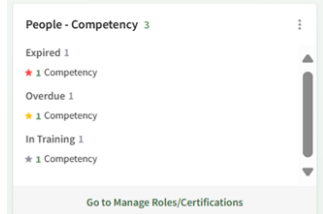



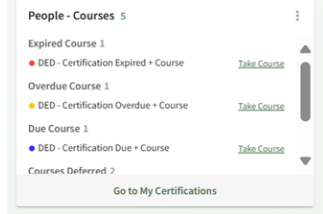




**Coming Soon: How To Customize a Kanban Board Module Summary Widget**



Kanban Module Summary

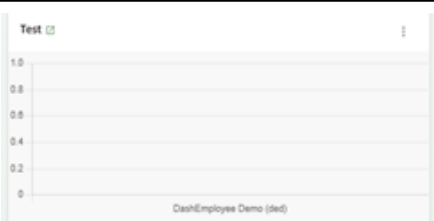


Customizable Kanban Board Module Summary

Meetings	Meeting with Recent Instance		
	Meeting with no Instances		
People	Module Summary Widget Key		
		Expired Certification	
		Expired Competency	
		Overdue Certification	
		Overdue Competency	
		Due Certification	
		In Training or Deferred Certification	
		In Training or Deferred Competency	
People- Competency	Module Summary Widget Key		
		Expired Competency	
		Overdue Competency	
		In Training or Deferred Competency	
People- Courses	Module Summary Widget Key		
		Expired	
		Overdue Courses	
		Due Courses	
		Deferred Courses	

# Chart Wizard Explanation

<b>Chart Widget Explanation Table</b>		
<p>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.</p>		
<b>Charts</b>	<b>Type and Recommended Usage</b>	<b>Image</b>
Representative	<b>Bar Chart:</b> Recommended when comparing quantities across different categories	
	<b>Horizontal Bar Chart:</b> Recommended when comparing quantities across different quantities	
	<b>Pie Chart:</b> Recommended when showing composition and parts of a whole	
	<b>Line Chart:</b> Recommended when showing continuous data trends over time	
	<b>Doughnut Chart:</b> Recommended when showing parts of a whole and highlighting a total or key metric in the center	
	Trending	<b>Line Chart:</b> 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.	