# Set Up a Dashboard

Dashboard

The new Jim2® Management Dashboard displays **Management information** and **Key Performance Indicators** for all areas of your business. This includes General Ledger financial information with comparisons, Debtors and Creditors balances, and all areas of your business workflow status. This information is displayed on Dashboard Tabs (Accounts, Service, Sales etc) using specific Dashboard Widgets.

Viewing the Dashboard
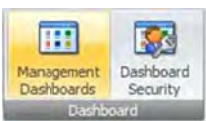
To view the Dashboard, click Dashboard on the Ribbon and then click Management Dashboards **(Dashboard > Management Dashboards)**. The Dashboard will then be displayed. Notice that the Dashboard now also appears in your Navigation Tree. The first time you view the Dashboard it will be blank, ie, no Dashboard Tabs have yet been created.

Dashboard Tabs
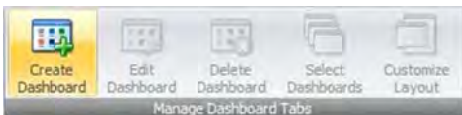
To create a new Dashboard Tab click **Dashboard > Create Dashboard**. Type in a name for your new Dashboard Tab and click **Save**. In this example, a new 'Accounts' Dashboard Tab will be created.

You can create as many Dashboard Tabs as you wish, and on each Tab add multiple Widgets, each configured to view specific areas of your business.
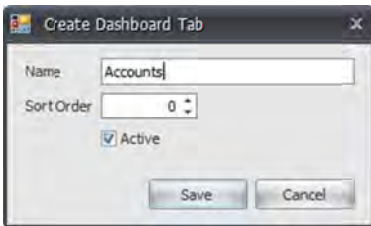
To edit the current Dashboard Tab, click **Dashboard > Edit Dashboard**. You can then rename your Dashboard Tab and change its display order within the Dashboard.

To delete the current Dashboard Tab, click **Dashboard > Delete Dashboard**.

Dashboard Widgets

Widgets are used to display information within a Dashboard Tab. Each Widget is designed to display a specific type of information and is then configured as to exactly what information from that area you wish to display. For example, using the Account Watch widget, display this year's profit s last year's, or my current Stock on Hand vs the same period last year.

To add a Widget to the current Dashboard Tab, click **Dashboard > Add Widgets**. Tick 'Account Watch' and click **OK** to add an Account Watch Widget to your dashboard. A new Account Watch widget will then be displayed. Click on the Widget's 'Configure' button to configure your Widget (see Widgets below).
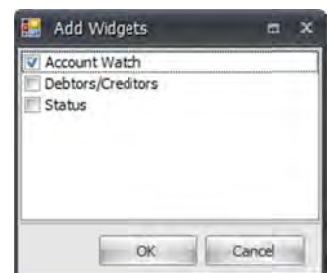
You can add as many Widgets as you like to a Dashboard Tab, including the same Widget multiple times. For example, several 'Account Watch' Widgets configured to look at different areas of your financial information.

Jim2® v3.1 ships with three standard 'system' Widgets.

- Account Watch
- Debtors/Creditors
- Status

Widgets are stored in your Jim2® database and additional Widgets can be imported as they become available, much like reports.

Account Watch Widget

The Account Watch Widget allows you to view all areas of your financial (General Ledger) information. It can be configured to display in graph format any account within your general ledger including headers and 'computed' accounts such as Gross Profit, Net Profit and Operating Profit over a given period. Periods include Last X days, This Month, Last Month, This Year, Last Year etc. It can then be grouped to display Daily, Weekly, Monthly or Quarterly, and compared to the same or a different account over the same or a previous period.

An extremely powerful feature of the Account Watch Widget is the MAT function. MAT stands for 'Moving Average Total'. When looking at a year of information, this is also known as 'Moving Annual Total'.
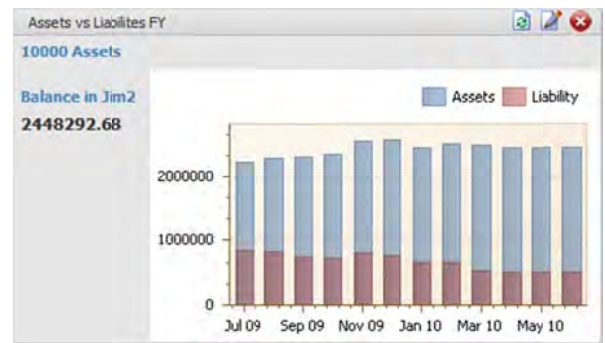
What to look at?

You can add and configure multiple Account Watch Widgets to see your entire financial position, along with trends. It is suggested you configure several Dashboard Tabs to cover the various financial aspects of your business.

Where is this information coming from?

All data displayed in the Account Watch Widget comes directly from your accounts transaction journal. Any information within the widget can be compared directly to information displayed within your Profit & Loss and Balance sheet. Any General Ledger account, including headers and computed accounts such as Net Profit, can be selected and displayed.

Some suggestions:

Sales and Profit
Try comparing a Stock GL Group's Income account vs its COGS account. Or total Income (header account 4-0000) vs Expenses (header account 6-0000).

Profit and Loss
Compare your Gross Profit vs Net Profit, or your Net Profit this year compared to last.

Assets and Liabilities
Try viewing your current bank balance, or your Cash Assets (all bank accounts and Unbanked funds), over a given period.

Keep an eye on your GST and tax liabilities.

Monitor your SOH (Stock on Hand) figures for this year vs same period last year.

Looking for Trends – MAT

Typically, when looking for trends, depending on your type of business, you would normally look at data over a year. In this case try setting the period to This Fin Year or Last X Days = 365.

The Moving Average Total (MAT) feature is particularly useful here. For example try displaying a Profit account and tick both Actual and MAT. Set Display to Monthly, the MAT period to, say, 3 and tick MAT Avg.

The widget will now show a year's worth of data, displayed Monthly, along with a 3 month MAT.

MAT is an extremely powerful method that looks for trends by smoothing out the highs and lows and displaying a rolling average. This makes it easier to compare especially performance to previous periods.

Chart Types and Palettes

Try changing chart types to match the type of data you are looking at. It's amazing how some data looks 'better' when displayed as an Area chart rather than a Bar chart, or vice versa.

Use palettes to make your Widgets more distinctive, 'Office' for P&L, and 'Nature' for Balance Sheet, for example.
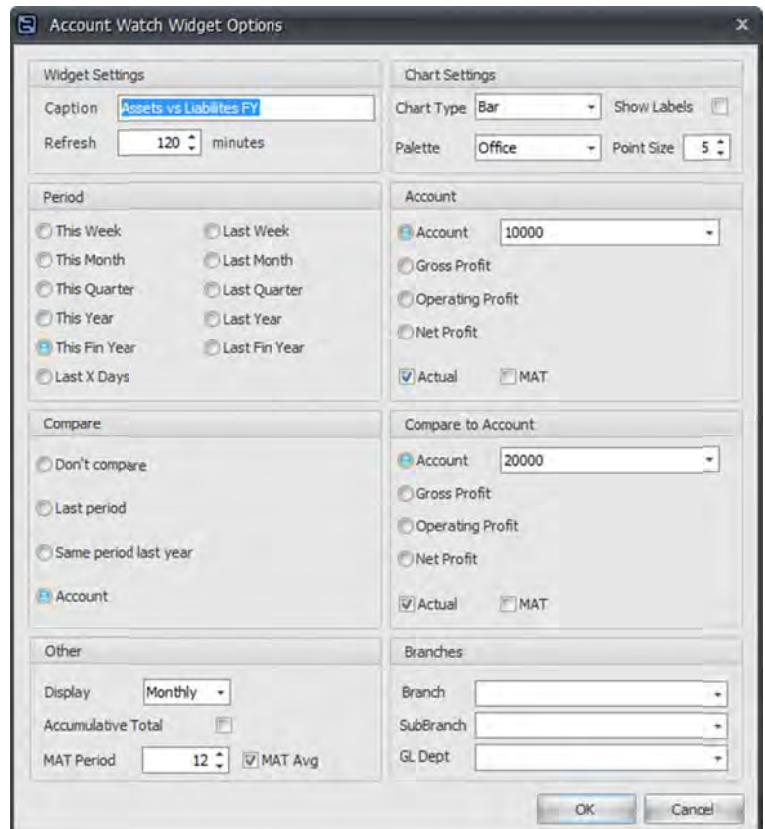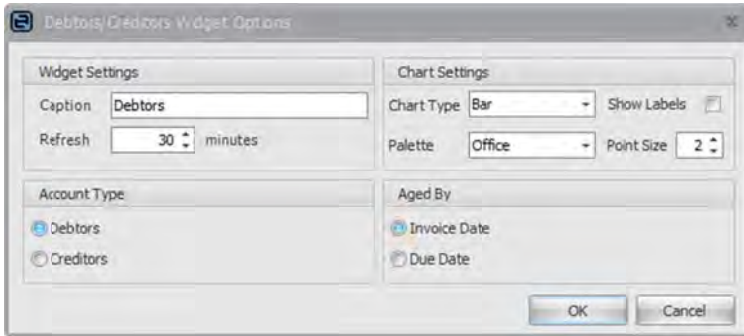
Account Watch Widget Options.

Group	Option	Description
Widget Settings	Caption	This is the caption that will be displayed at the top of the Widget Example: Stock On Hand – Current vs Last Year
	Refresh	The Widget's refresh interval in minutes Note: It is suggested not to set this too low (eg 15 minutes or higher)
Chart Settings	Chart Type	Select Bar, line or Area Chart
	Show Labels	Show $ figure above each point of the chart Note: the label will be displayed as a hint when your mouse is over a graph point
	Palette	Select the palette (colours) that will be used in the graph
	Point Size	The size of graphs Points Default = 2. Try 8 or 10 on smaller graphs
Period	This Week	Period range for first series of data to be displayed
	This Month	
	This Quarter	Last X days allows you to view a number of days back from today. Example 30 to display the last 30 days, 365 for the last year, or 1095 for the last 3 years
	This Year	
	This Fin Year	
	Last X Days	
	Last Week	
	Last Month	
	Last Quarter	
	Last Year	
	Last Fin Year	
Account	Account	Display the selected General Ledger account as the graph's first series of data
	Gross Profit	Display Gross Profit as the graph's first series of data
	Net Profit	Display Net Profit as the graph's first series of data
	Operating Profit	Display Operating Profit as the graph's first series of data
	Actual	Tick to display the actual (real) account figures
	MAT	Tick to display the MAT (using MAT options below) account figures
Compare	Don't Compare	Display only the graph's first series of data
	Last Period	Compare to data from last period Example: If Period = This Month, comparison = Last Month
	Same Period Last Year	Compare to data from same period last year Example: If Period = This Month, comparison = Last Month
	Account	Compare to data from a different General Ledger Account
Compare to Account	Account	Compare against the selected General Ledger account
	Gross Profit	Compare against Gross Profit
	Net Profit	Compare against Net Profit
	Operating Profit	Compare against Operating Profit
	Actual	Tick to display the actual (real) account figures in the comparison
	MAT	Tick to display the MAT (using MAT options below) account figures in the comparison
Other	Display	Group and display data by selection. Daily, Weekly, Monthly or Quarterly
	Accumulative Total	Display data as an accumulative total Example: When displaying a P&L account, the data will start at zero and are added together for the period selected
	MAT Period	The number of periods used in MAT calculations. Example: When displayed by Months, 3 would be the total of the current month and the previous two months
	MAT Average	Display MAT as an average (rather than a total) In MAT period example 50 + 100 + 60 = 210 and then 210 / 3 = 70
Branches	Branch	Filter P&L account data by specific Branch
	SubBranch	Filter P&L account data by specific SubBranch
	GL Dept	Filter P&L account data by specific GL Dept

Debtors/Creditors Widget

The Debtors/Creditors Widget allows you to view the current state of either your Debtors or Creditors as a graph. Debtors/Creditors are grouped by Current, 30, 60 and 90+ days. The sum of your Debtors/Creditors is displayed along with the number and total of Overdue Invoices, follow ups, unallocated credits and accounts on hold or over limit.

The amounts outstanding (displayed as bars in the graph) can be drilled down on, that is, you can click on, for example, the 90 Days bar and a grid will appear listing the overdue Invoices. You can then right click to view that Debtor/Creditor within Jim2®.
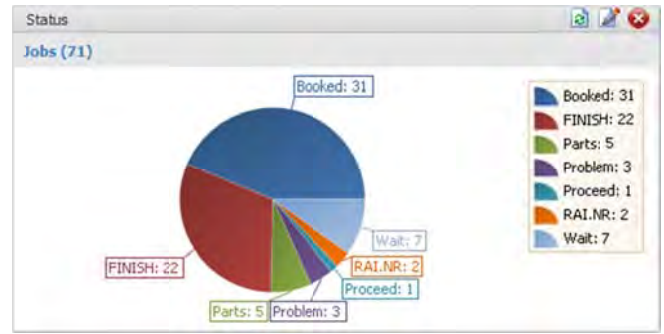
Debtors/Creditors Widget Options

Group	Option	Description
Widget Settings	Caption	This is the caption that will be displayed at the top of the Widget Example: Stock On Hand – Current vs Last Year
	Refresh	The Widget's refresh interval in minutes Note: It is suggested not to set this too low (eg 15 minutes or higher)
Chart Settings	Chart Type	Only the Bar Chart type is available in this widget
	Show Labels	Show $ figure above each point of the chart Note: the label will be displayed as a hint when your mouse is over a graph point
	Palette	Select the palette (colours) that will be used in the graph
	Point Size	The size of graphs Points Default = 2. Try 8 or 10 on smaller graphs
Account Type	Debtors	Display Debtors information
	Creditors	Display Creditors information
Aged By	Invoice Date	Aged by Invoice Date
	Due Date	Aged by Due Date

Status Widget

The Status Widget allows you to view the current state of any Status driven object (Job, Purchase Order, Quote etc) grouped by Status.

The Widget's filter options will vary depending on which object you have selected.

The object will display as either a bar, line or Area chart grouped by Status. The Status Widget can be drilled down on, that is you can click on, for example, Jobs on Parts, and a grid will appear listing these Jobs. You can then right click to view that Job within Jim2®.

Status Widget Options

Group	Option	Description
Widget Settings	Caption	This is the caption that will be displayed at the top of the Widget Example: Stock On Hand – Current vs Last Year
	Refresh	The Widget's refresh interval in minutes Note: It is suggested not to set this too low (eg 15 minutes or higher)
Chart Settings	Chart Type	Select Bar, line or Area Chart
	Show Labels	Show $ figure above each point of the chart Note: the label will be displayed as a hint when your mouse is over a graph point
	Palette	Select the palette (colours) that will be used in the graph
	Point Size	The size of graphs Points Default = 2. Try 8 or 10 on smaller graphs
Filters	Object	Select Job, Quote, Purchase, Project, Return From Customer, Return To Vendor, Stock Transfer or Stock Adjustment. Note: the available filters will change based on the selected object.

What to look at?

The Status Widget lets you see the current state of your workflow within your business. For example, a Service Dashboard Tab may contain several Status Widgets looking at different areas of your service centre, all active service jobs, all Onsite Service Jobs, all urgent jobs, overdue jobs etc. You may also have Widgets for each technician level.

Currently Logged

Note the selection of (Logged) in the filter for Name# in the above example. This allows management to configure widgets so that the information displayed is relevant to the currently logged user or account manager.

Note: Please see the section on Dashboard Security for more information.

Dashboard Security

Dashboard security is of critical importance as the Dashboard can display confidential information, especially with regard to your business' financials. As such, some care must be used as to who in the company is allowed to create and manage Dashboards, and who is allowed to see which Dashboard Tabs.

Create and Manage Dashboards Security

The creating and managing of Dashboards is generally by managers and owners, and is handled via 'traditional' security in Jim2®. By default, only users with administration rights have this ability.

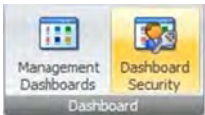The following additional security settings have been added:

Tools > Security > Dashboard

• View Management Dashboards

• Dashboard Security

• Manage Dashboards and Widgets

By default, only the View Management Dashboards security setting is enabled.
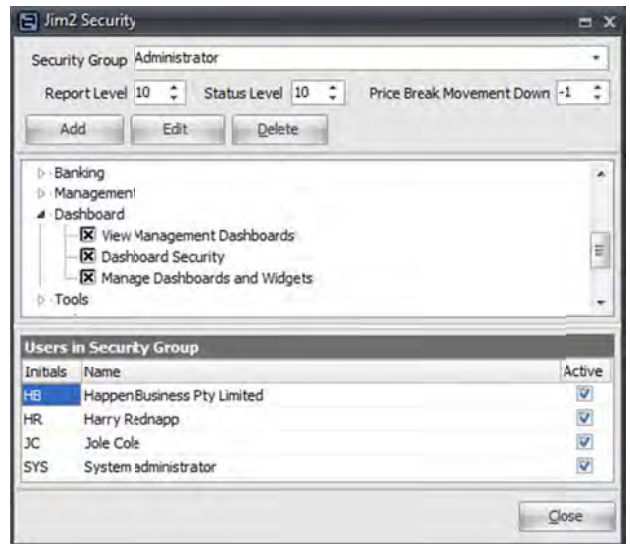
Dashboard Security

Dashboard Security allows you to control which users can access which Dashboard Tabs. When you create a Dashboard Tab, by default, it is only visible to you. Then, via Dashboard Security, you select this Tab and then select which other users can view. The Tab will then automatically appear in their Dashboard when next viewed.

Basically, as management, you are creating various Dashboard Tabs based on specific areas of your business, and then via Dashboard Security, controlling who is allowed to view these dashboards.

You can set Dashboard Security using the following two methods:

Dashboard by User:
This Dashboard Tab can be viewed by the selected users.

To enable other users to view specific Dashboard Tabs, click on **Dashboard > Dashboard Security**. The Dashboard screen will then open. Select view by '**Dashboard**' and select the Dashboard Tab you wish to allow other people to view. Click **Edit** and use the arrow buttons to move users across to the Selected Users panel. When finished, click **Save**.

To speed up the selection process, assuming your Dashboard Security is loosely based on your Jim2® Security Level, you can select a security level and click Select. All users within this security level will then be automatically selected.

User by Dashboard:
This User can view the selected Dashboard Tabs.

To enable which users can view specific Dashboard Tabs click on **Dashboard > Dashboard Security**. The Dashboard screen will then open. Select view by '**User**' and select the user you wish to work with. Click **Edit** and use the arrow buttons to move Dashboards across to the Selected Dashboards panel. When finished click **Save**.

Dashboard Layout
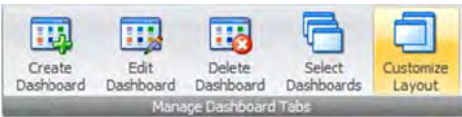
By default, when adding Widgets to a Dashboard Tab, the Widgets will be created one beneath the other. Customize Layout allows you to move and resize widgets to suit your requirements, even add spaces and labels.

Select the Dashboard Tab you wish to customize and click **Dashboard > Customize Layout**. The Dashboard Tab will then enter 'layout' mode and the Customization form will then appear.

Resizing Widgets

To resize a Widget, first select the Widget by clicking on it. Then right click on the Widget and select '**Size Constraints**', and the select '**Free Sizing**'. You can now click and hold on the 'sides' of the Widget and resize as required.

Locking a Widget's size

To lock a Widget's size to avoid it being resized, right click on the Widget and select '**Size Constraints**', and then select '**Lock Size**', '**Lock Width**' or '**Lock Height**'.

Moving Widgets

To move a Widget simply click and, whilst holding the mouse button, drag the Widget to its new position. You'll notice that as you move the Widget around the Dashboard Tab, a line or box will appear indicating where the Widget will move to upon releasing the mouse button.

Adding Groups, Labels, Spaces and Splitters

As well as resizing and moving Widgets, you can also add Groups, Labels, Spaces and Splitters to your Dashboard Tab. You can do this by 'dragging' these items from the Customization Form onto your Dashboard Tab, or by right clicking on your Tab and selecting the appropriate item. Hide these items by dragging them into Customization Form's 'Hidden Items' tab.
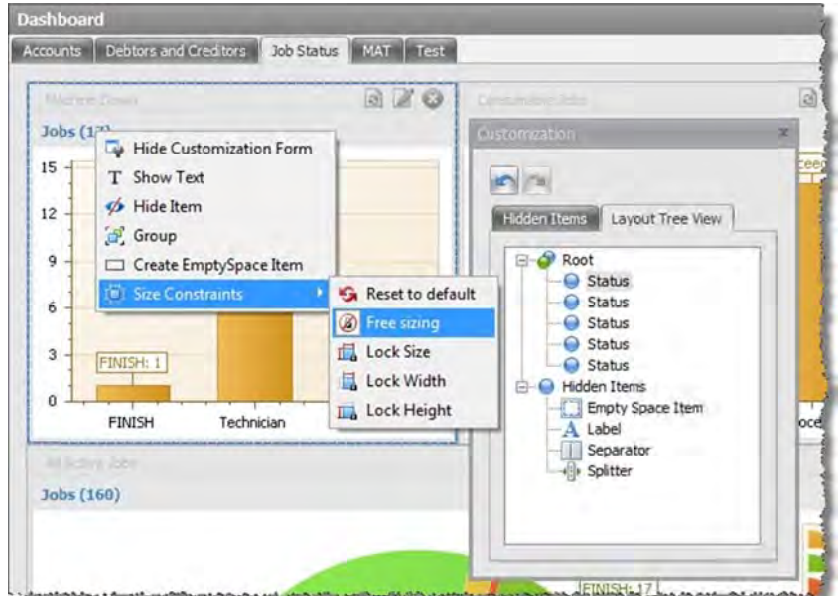
Finishing Customization

To finish customizing your Dashboard Tab, click the close 'X' button on the Customization Form, or right click on your Dashboard Tab and select '**Hide Customization Form**'.

Manage Dashboard Widgets

Dashboard Widgets are stored within your Jim2® database, and are loaded and displayed automatically when opening the Dashboard. Manage Widgets allows you to manually load new or custom created Widgets, or delete existing Widgets.

Note: Jim2® Updates will automatically import new widgets and update existing ones.