

Custom Dashboards

2016 - Fall Edition

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Overview

Custom Dashboards allow the user to create their own customized dashboard equipped with their specific needs. Custom Dashboards can include any combination of the available dashboards within Club Intelligence. In this manual we will discuss how to create a new Custom Dashboard.

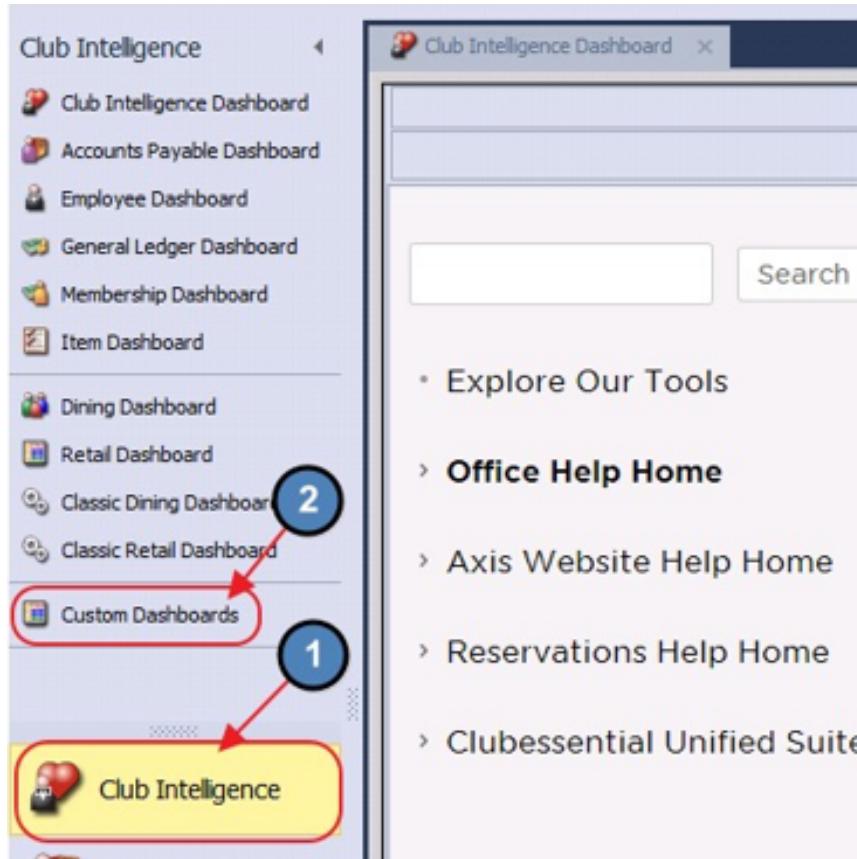
Use Case(s)

A Club would like to view their Open POS Tickets in a dashboard. The Club designs a custom dashboard to contain the items they want to see at a glance.

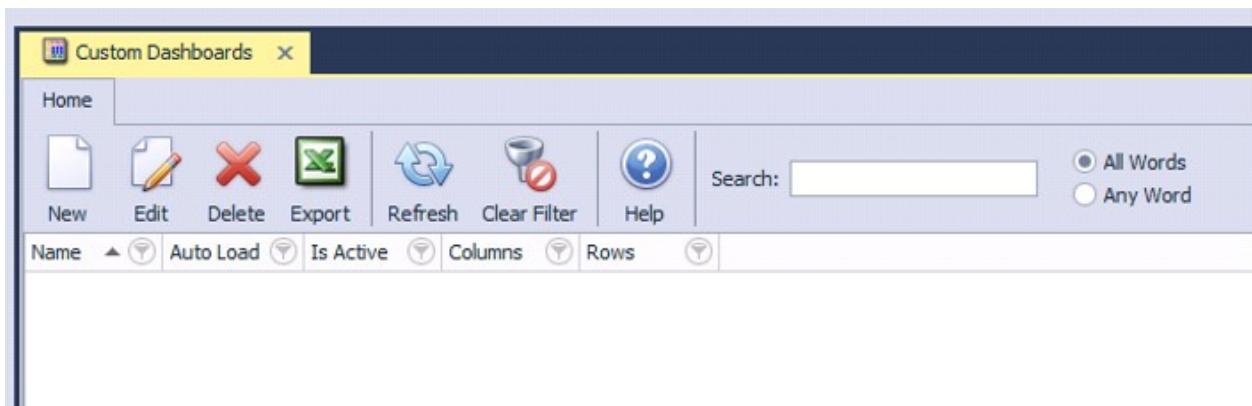
Accessing the Tool

To access **Custom Dashboards**,

- 1) Select **Club Intelligence** from the left user menu and choose **Custom Dashboards** from the available options.



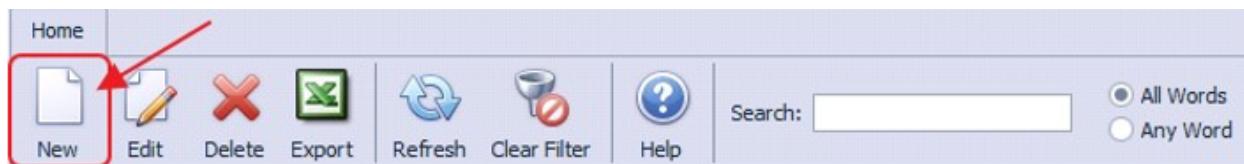
- 2) The **Custom Dashboards Grid** will launch.



Create a New Custom Dashboard

To create a new Custom Dashboard,

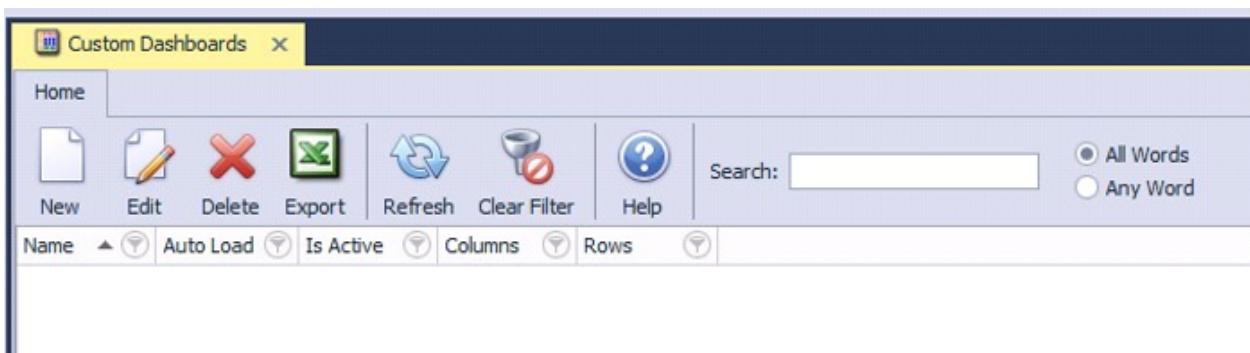
- 1) Select the **New** Icon



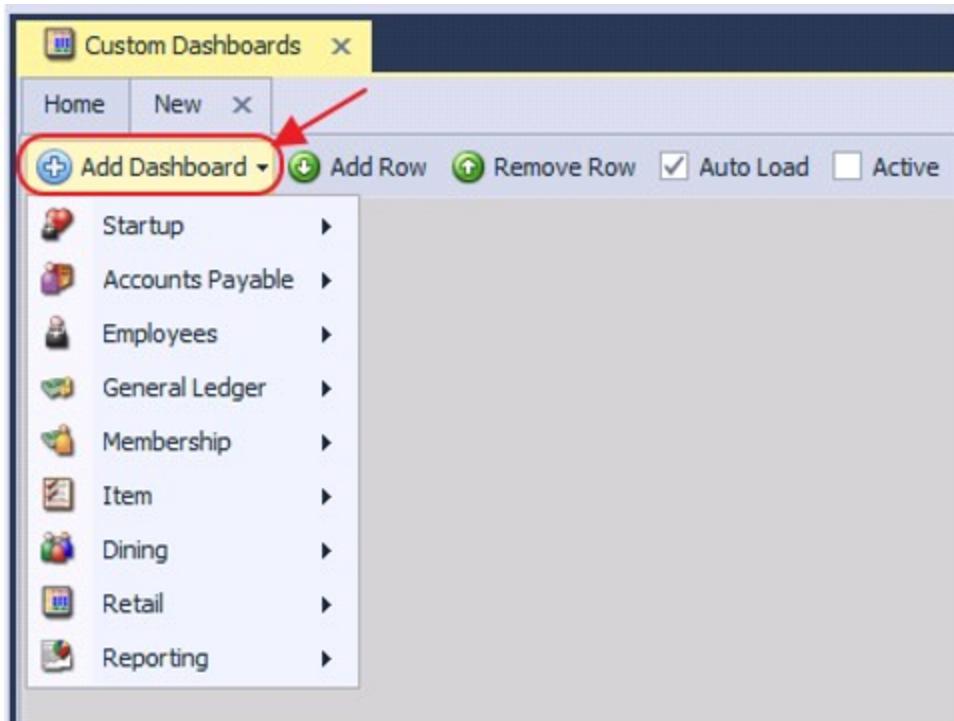
- 2) Enter a **Layout Name** for the new dashboard. Click **OK**.



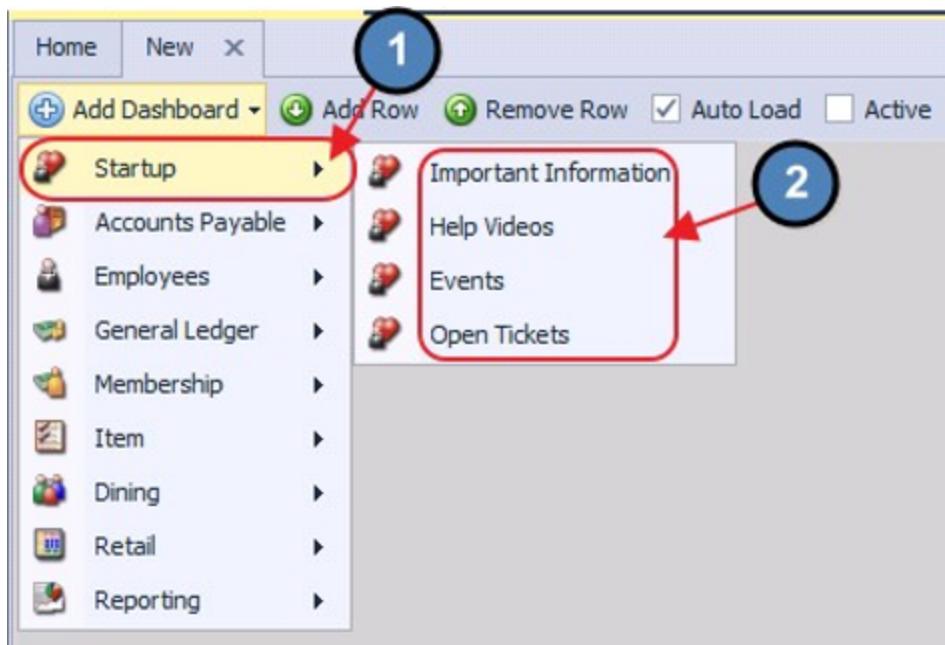
- 3) The Custom Dashboard setup screen will launch.



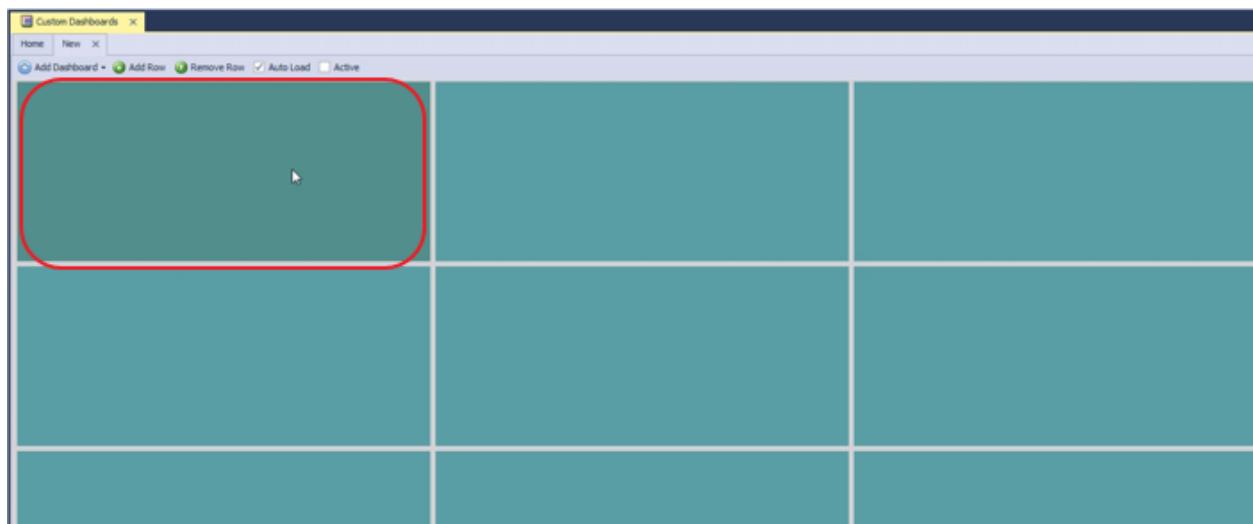
- 4) To add a dashboard to the screen, select the **Add Dashboard** drop down and a list of available modules will appear.



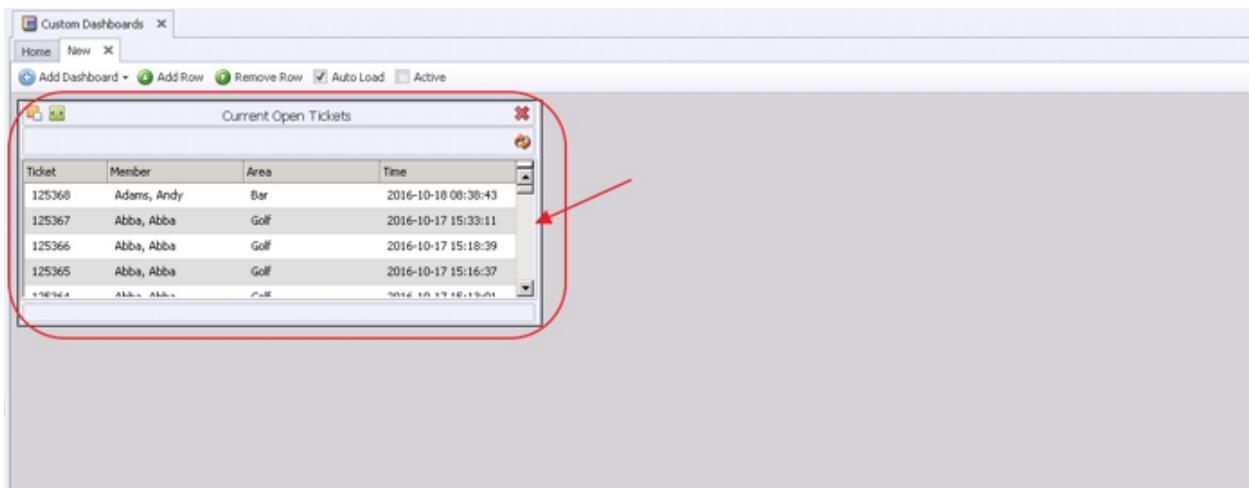
- 5) Hover over a module to see the available dashboards for that specific module.
Then, select the desired dashboard from the available list.



- 6) Once a dashboard is selected, select the space the dashboard should be placed on the screen. Use the mouse to hover over the desired space.



- 7) Once a space is selected, the dashboard will populate.

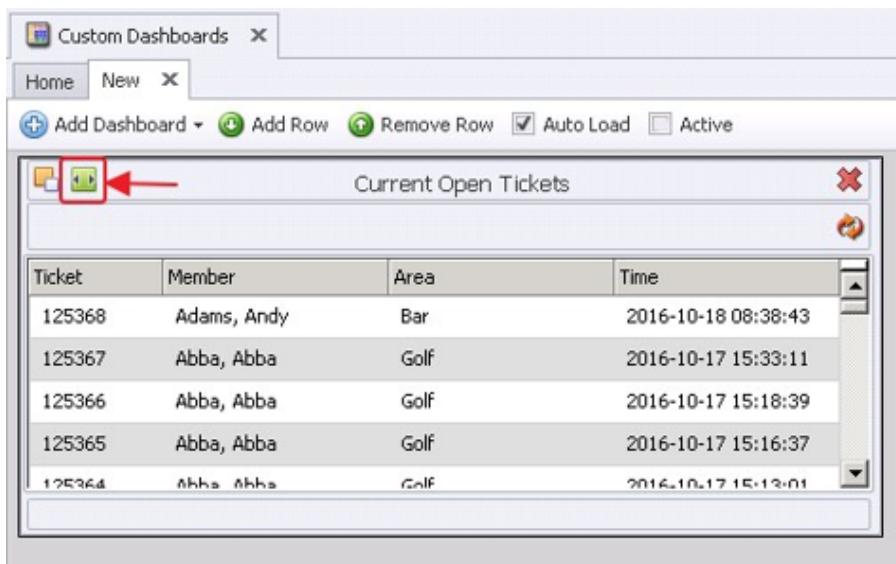


- 8) Add any other desired dashboards as applicable.

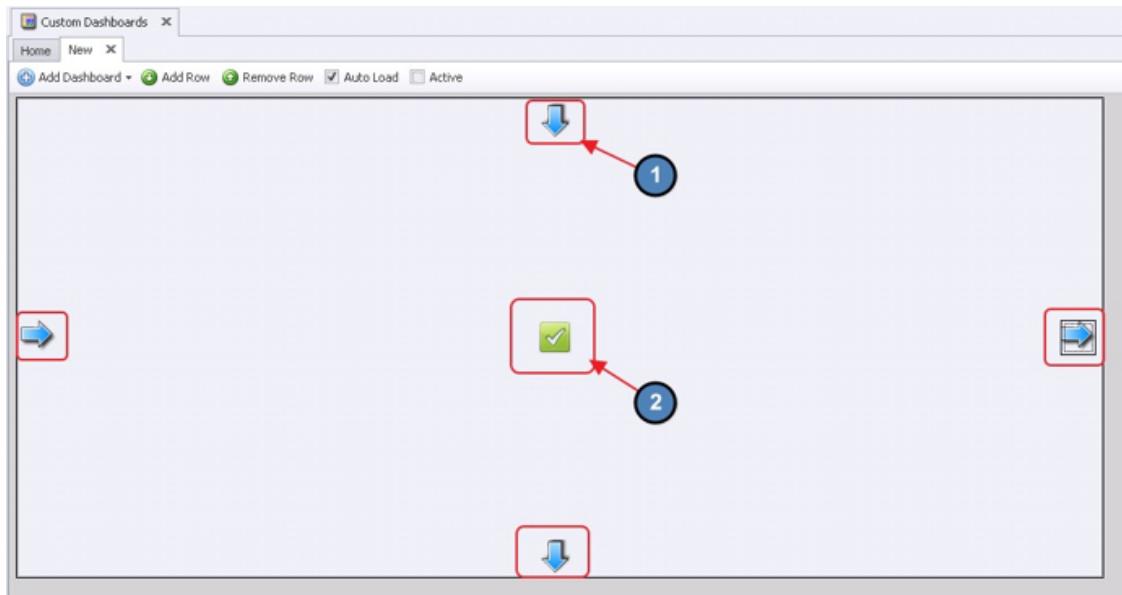
Edit a Custom Dashboard

Adjust Size of Dashboard

To adjust the size of any dashboard, select the green adjustment icon on the top left corner of the dashboard.

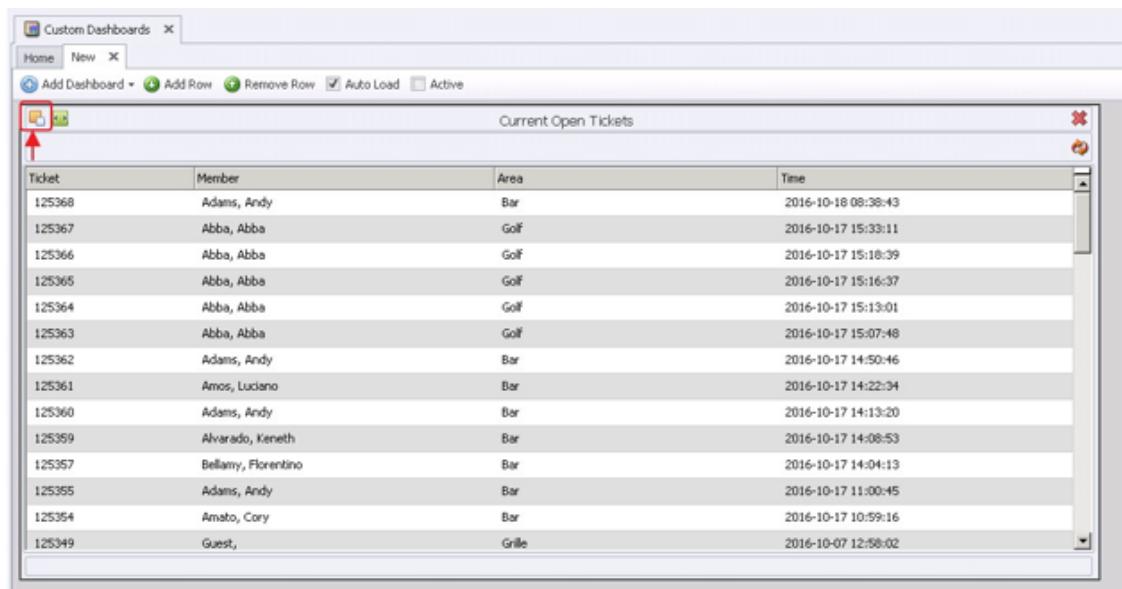


Use the blue arrows to increase the size of the dashboard. Click the green check mark when the adjustment is finished.



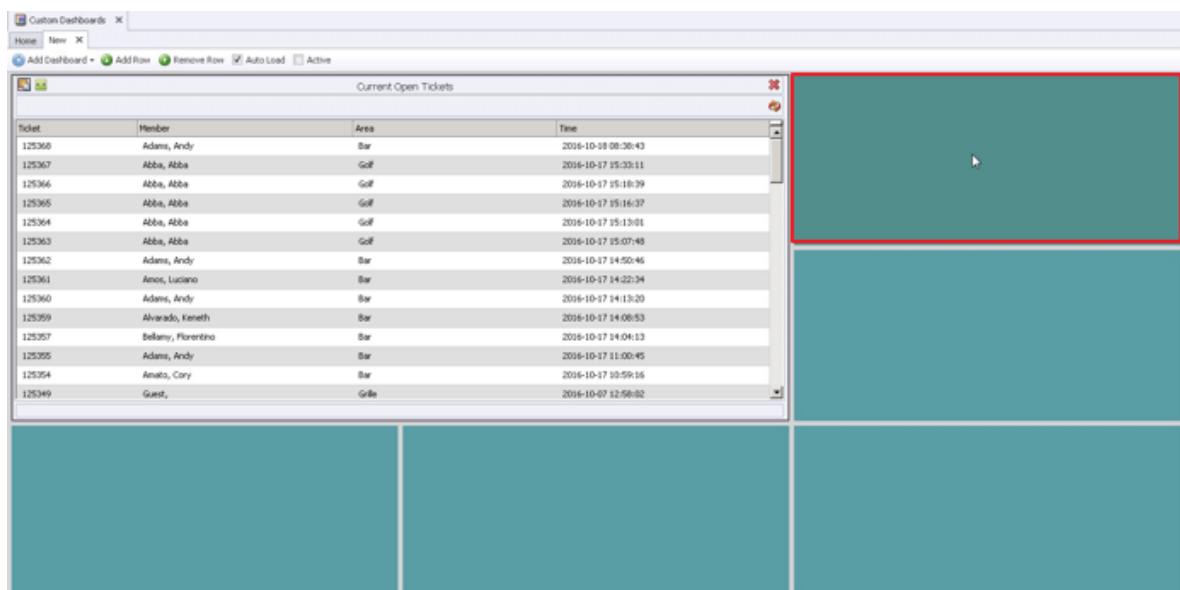
Move Dashboard to New Location

To move a dashboard to a new location, select the green adjustment icon on the top left corner of the applicable dashboard.



Ticket	Member	Area	Time
125368	Adams, Andy	Bar	2016-10-18 08:38:43
125367	Abba, Abba	Golf	2016-10-17 15:33:11
125366	Abba, Abba	Golf	2016-10-17 15:18:39
125365	Abba, Abba	Golf	2016-10-17 15:16:37
125364	Abba, Abba	Golf	2016-10-17 15:13:01
125363	Abba, Abba	Golf	2016-10-17 15:07:48
125362	Adams, Andy	Bar	2016-10-17 14:50:46
125361	Amos, Luciano	Bar	2016-10-17 14:22:34
125360	Adams, Andy	Bar	2016-10-17 14:13:20
125359	Alvarado, Kenneth	Bar	2016-10-17 14:08:53
125357	Bellamy, Florentino	Bar	2016-10-17 14:04:13
125355	Adams, Andy	Bar	2016-10-17 11:00:45
125354	Amato, Cory	Bar	2016-10-17 10:59:16
125349	Guest,	Grille	2016-10-07 12:58:02

Select the new space the dashboard should be located.



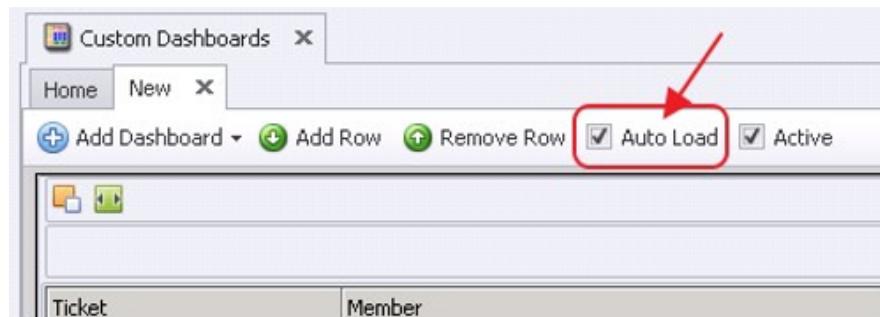
The dashboard will move to the new location and adjust to the appropriate size.



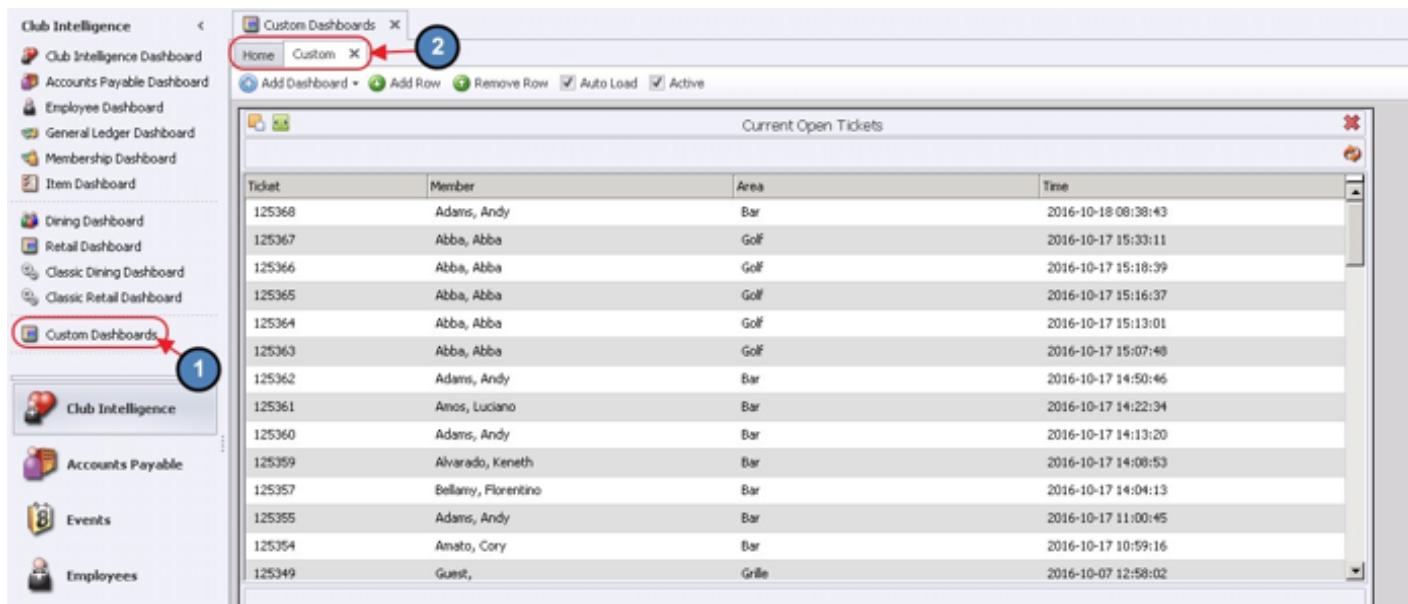
Auto Load Option

Once a new dashboard is created, the dashboard can be set to **Auto Load** when the Custom Dashboard option is selected.

To do so, please check the **Auto Load** check box on the corresponding Custom Dashboard.

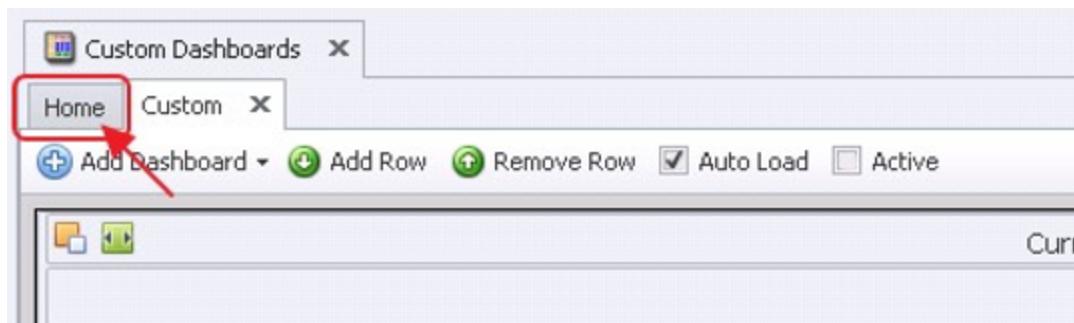


Now, when Custom Dashboards is selected from the available Club Intelligence options, the selected Custom Dashboard will automatically load.



The screenshot shows the Club Intelligence interface. On the left, there's a sidebar with various dashboard icons. One icon, 'Custom Dashboards', is highlighted with a red box and labeled '1'. At the top, there's a navigation bar with tabs: 'Home' (highlighted with a red box and labeled '2'), 'Custom', and a close button. Below the navigation bar are buttons for 'Add Dashboard', 'Add Row', 'Remove Row', 'Auto Load' (which is checked), and 'Active'. The main area displays a grid titled 'Current Open Tickets' with columns for 'Ticket', 'Member', 'Area', and 'Time'. The grid contains 15 rows of ticket information.

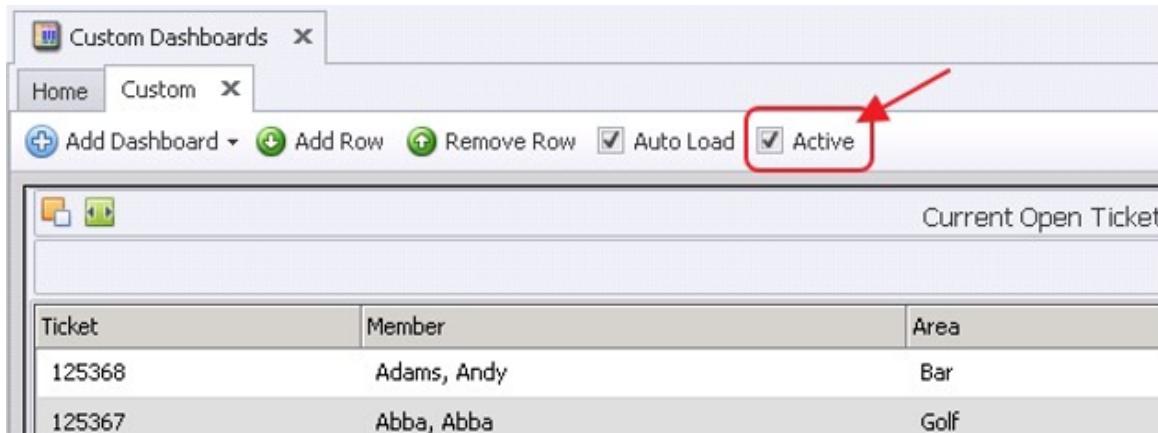
Select the **Home** tab to create any new dashboards.



This screenshot shows the 'Custom Dashboards' window. The 'Home' tab is selected and highlighted with a red box. A red arrow points to the 'Add Dashboard' button, which has a plus sign icon. The window also includes a 'Custom' tab, 'Add Row' and 'Remove Row' buttons, and 'Auto Load' and 'Active' checkboxes.

Active Option

If multiple Custom Dashboards are set to Auto Load, please check the **Active** check box on the Dashboard that should be loaded first.



The screenshot shows the 'Custom Dashboards' application window. At the top, there are tabs for 'Home' and 'Custom'. Below the tabs are several buttons: 'Add Dashboard' (blue plus), 'Add Row' (green plus), 'Remove Row' (green minus), 'Auto Load' (checkbox), and 'Active' (checkbox, which is checked and highlighted with a red box and an arrow pointing to it). The main area is titled 'Current Open Ticket' and contains a table with two rows:

Ticket	Member	Area
125368	Adams, Andy	Bar
125367	Abba, Abba	Golf

Frequently Asked Questions

How do I inactivate a dashboard view?

Simply uncheck the **Auto Load** and **Active** options within the **Custom Dashboards** screen.

How do I ensure that a particular Dashboard is loaded first?

Ensure the **Active** option is checked within the **Custom Dashboards** screen.

Best Practices

Ensure the Dashboard Tiles you have designated to display are actively utilized. It is better to have fewer items on a dashboard that are used, than many on a dashboard that are not used.