DASHBOARDS

How to Create/Edit Dashboards in TMS

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Scope

This guide goes over the initial steps for setting up Dashboards in TMS, which allow admins and technicians to keep track of productivity, workflow, discussions, and more.

Throughout this document, you will learn how to create new Dashboards; grant Dashboard access to the appropriate users; add and modify Widgets of several types and learn how to integrate Data Sources with the appropriate Dashboard tabs.

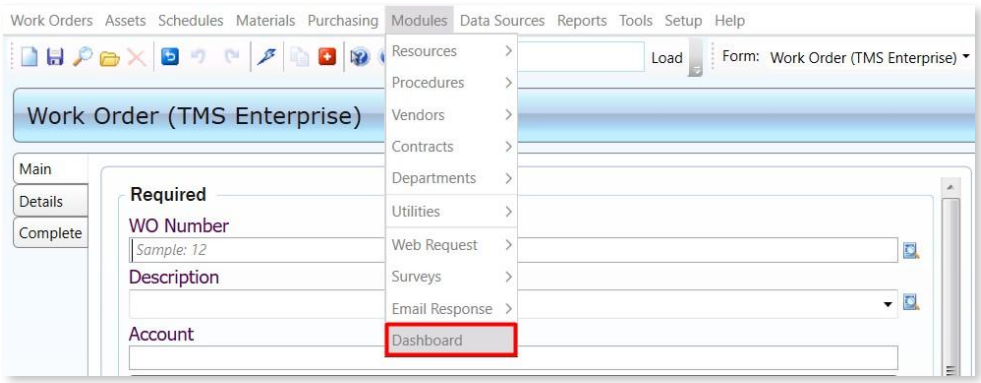
Dashboards

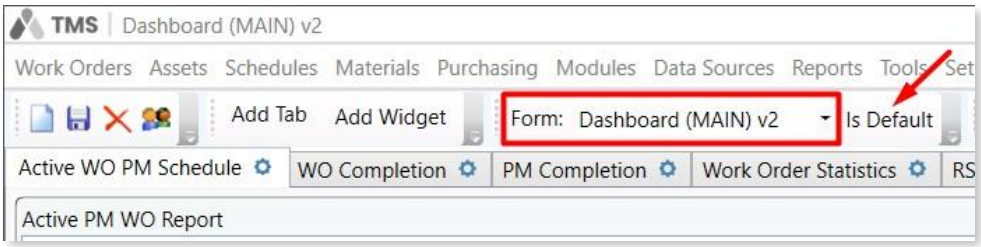
Accessing TMS Dashboards

Go to ***Modules > Dashboard***.

*The default form loads

- Users can change forms by clicking the dropdown field labeled “Form”.
- After selecting a form, a user can make that form their default by clicking ***Is Default***.



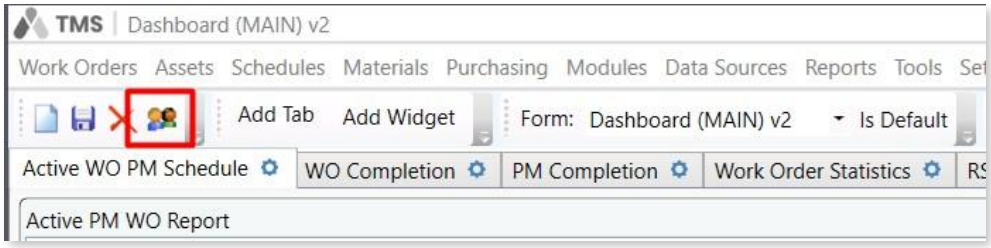


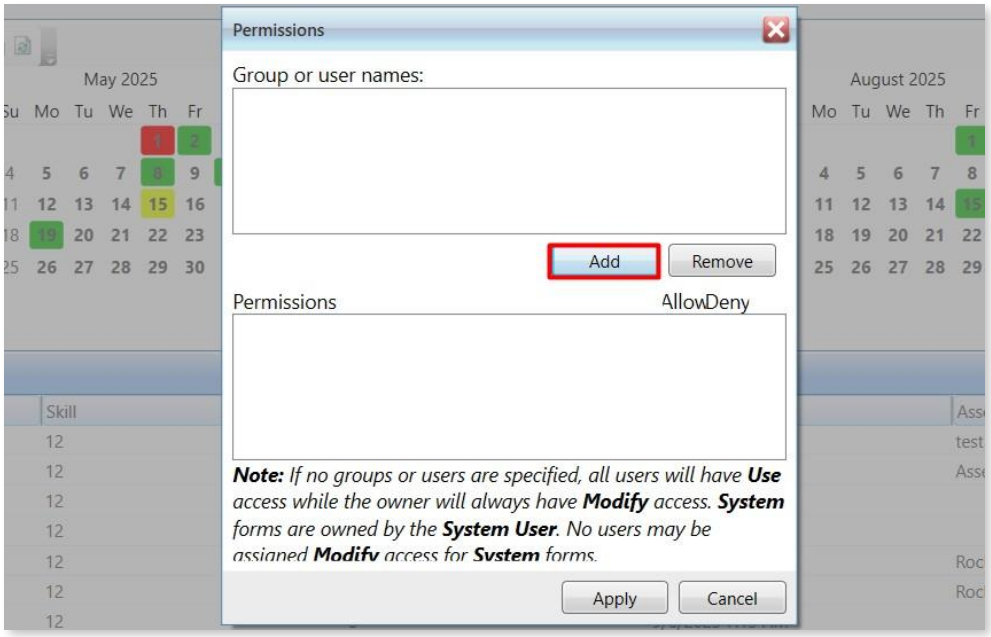
Permissions

Form owners can restrict access using the *Permissions* button in the upper left corner of the screen.

Clicking the icon opens a dialog window where groups or specific users can be granted access to the form.

Click the ***Add*** button to bring up a selection of users/groups.





Once a user or group has been added, **any users not listed will NO LONGER have access to the form**.

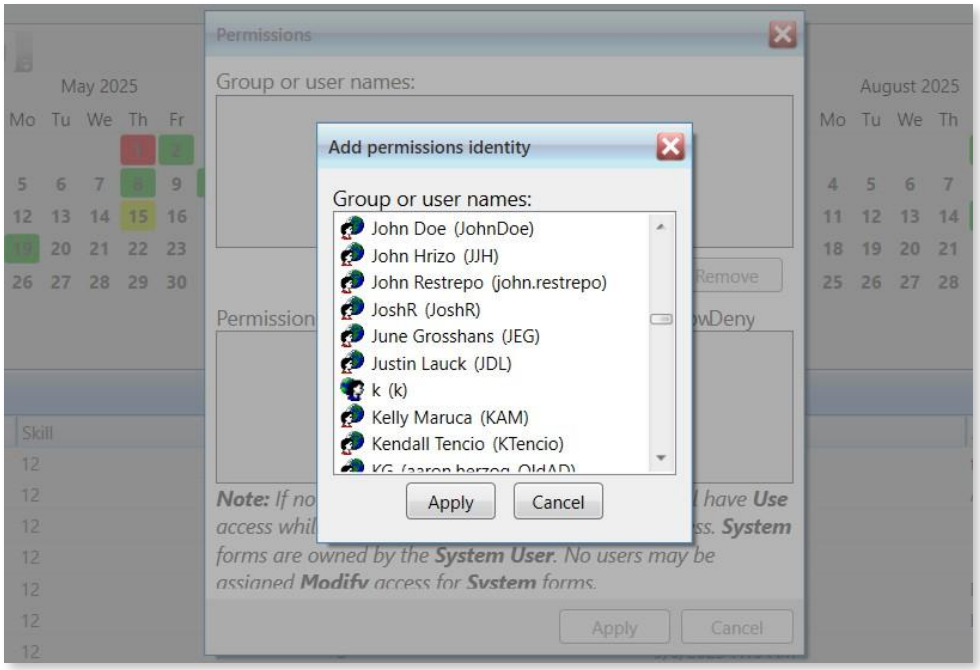
Note: if an unlisted user tries to access a restricted form, they may be kicked out of the system.

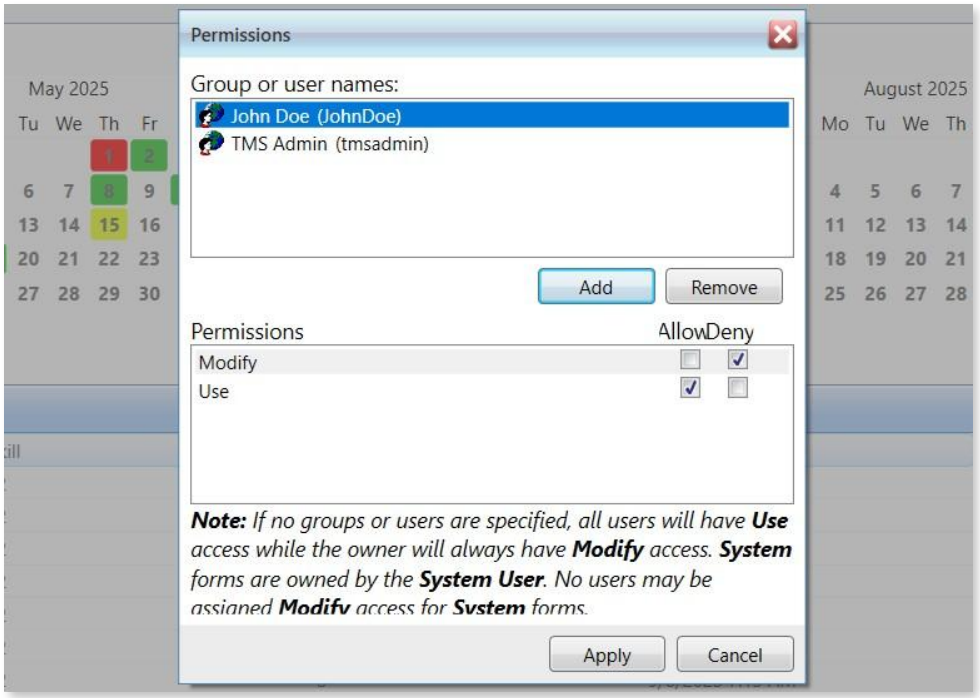
If *this* Dashboard Form, to which you have applied permissions, is set as the default for a user or group not listed in the permissions set, another Dashboard Form will need to be selected for them, or else they will be unable to use the Dashboard module.

Each group or user's level of access can be set by highlighting their name and allowing or denying permission to modify or use the form.

Click ***Apply*** to save the permissions settings.

Note: If a new Dashboard is created based on an existing Dashboard which has permissions settings associated with it, the permissions settings will **not** be carried over to the new Dashboard.





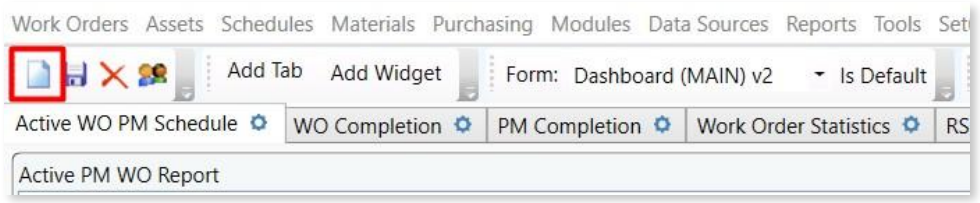
Creating Dashboard Forms

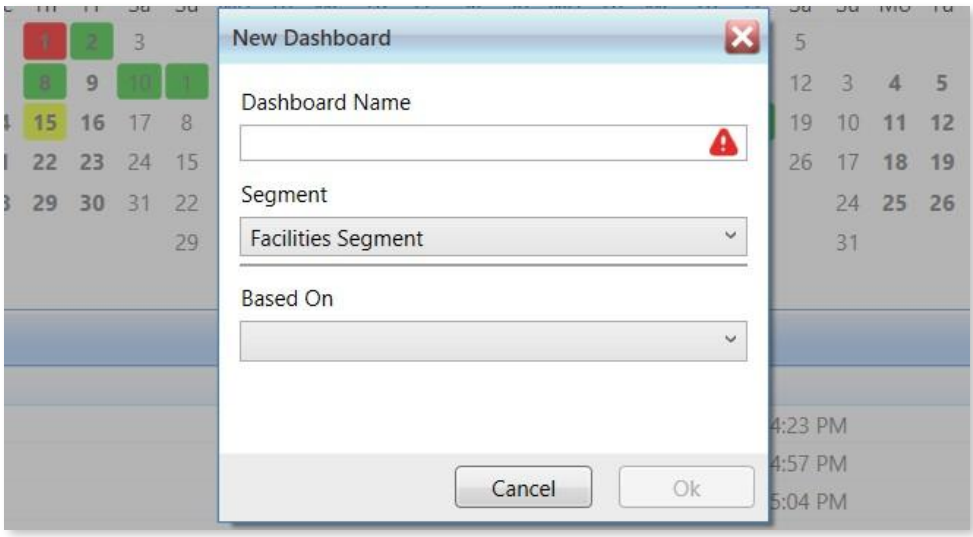
To create a new Dashboard, go to ***Setup > Dashboards > New*** or go to ***Modules > Dashboard*** and click the *paper icon* in the upper left corner.

*A dialog window titled “New Dashboard” opens

- Give your dashboard a name.
- Select the appropriate segment.
- The ***Based-On*** field is optional and allows you to copy an existing dashboard.
- Click ***Ok***.

A blank dashboard features a starter tab with the default label *Add Tab*.



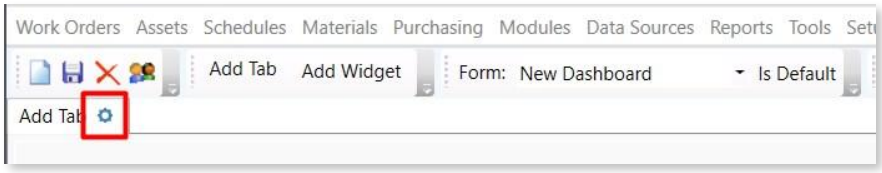


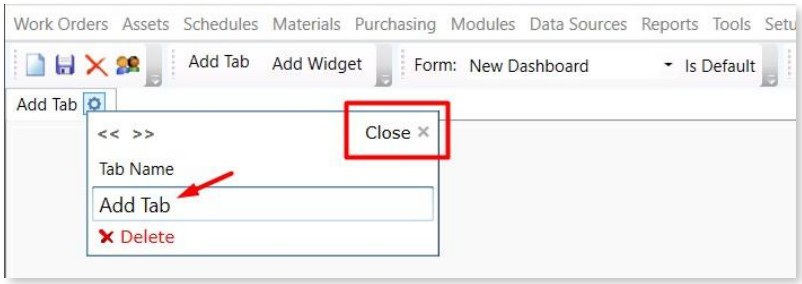
Renaming Dashboard Tabs

To rename a Dashboard tab, click on the *gear icon*.

*A popup window opens

Rename the Dashboard tab, then click ***Close***.



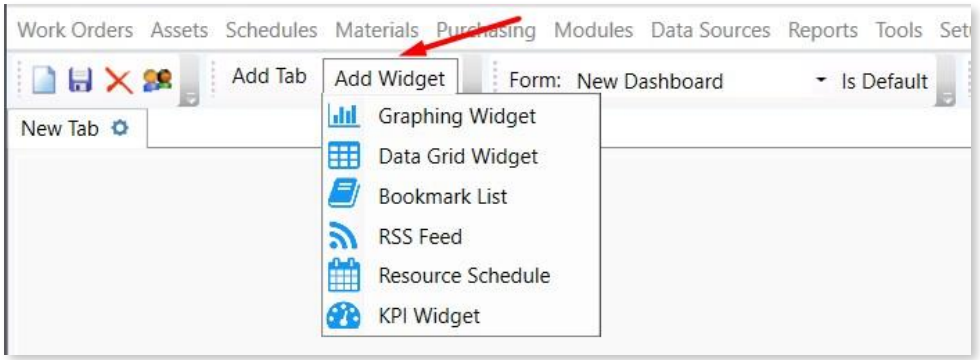


Widgets

Adding a Widget

Click the ***Add Widget*** button and select one of the following:

- Graphing Widget
- Data Grid Widget
- Bookmark List
- RSS Feed
- Resource Schedule
- KPI Widget



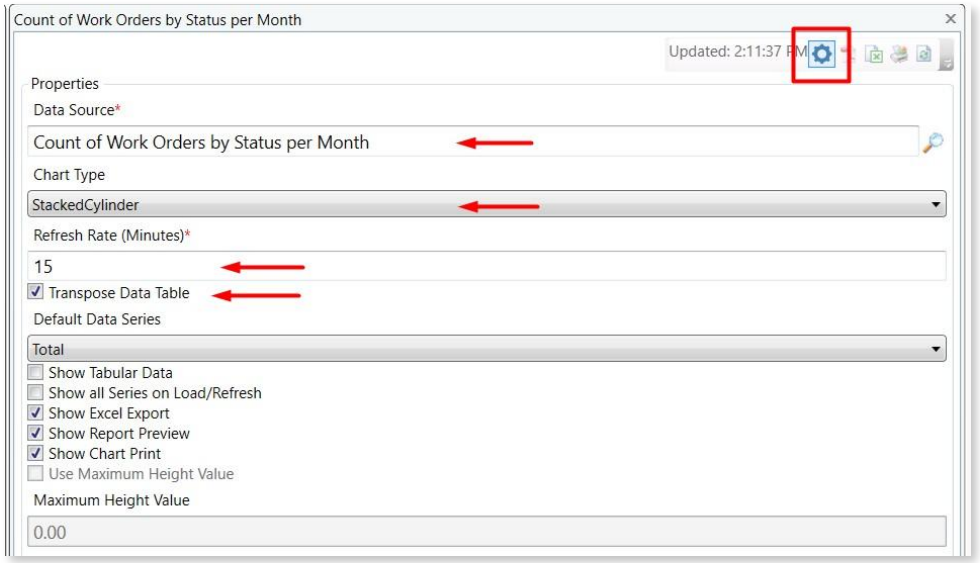
Graphing Widgets

On the Graphing Widget Setup screen:

- Select Data Source/Chart Type.
- Set a refresh rate (0-60 minutes).
- Select the reporting/exporting checkbox options.

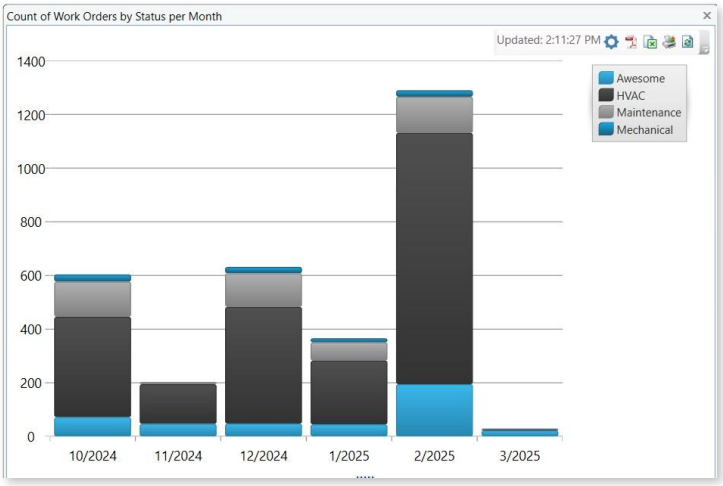
Graphing Widgets require either a **Cross Tab** or a **Summary List** Data Source.

- At the end, click the *gear icon* to return to the Dashboard screen.

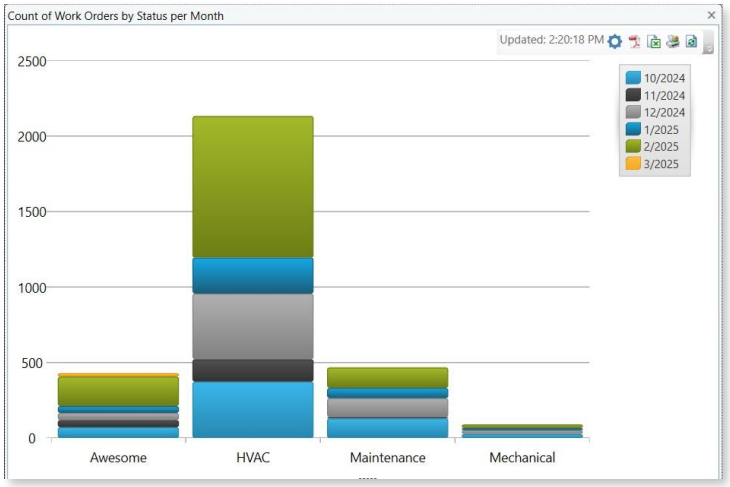


Below, you can see the same Widget represented in two different ways:

☐ Transpose Data Table



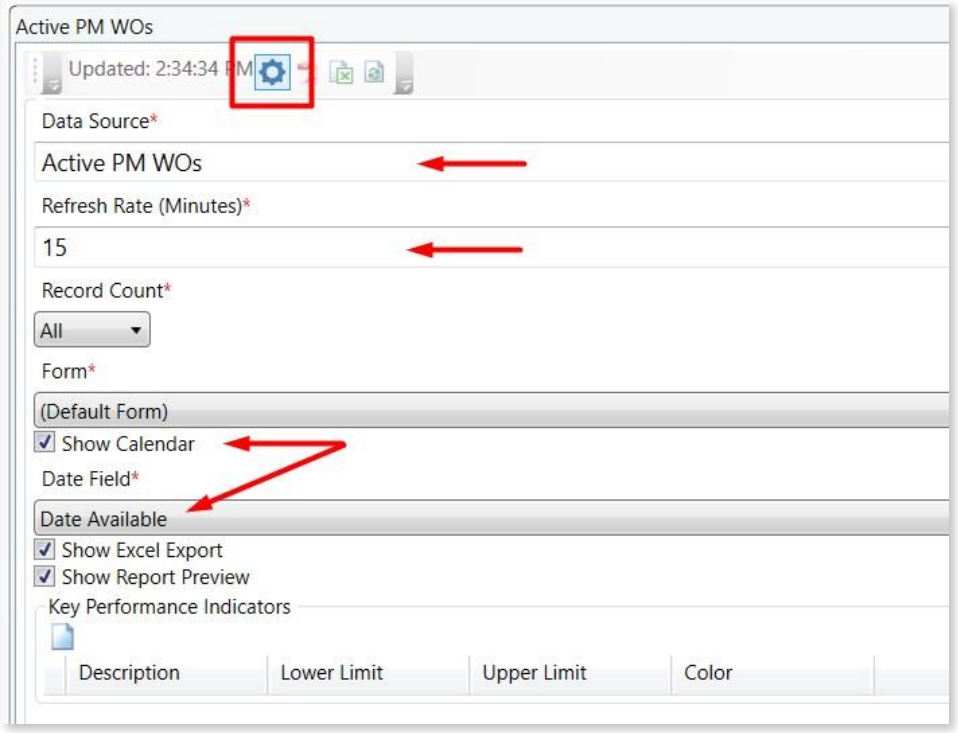
☑ Transpose Data Table



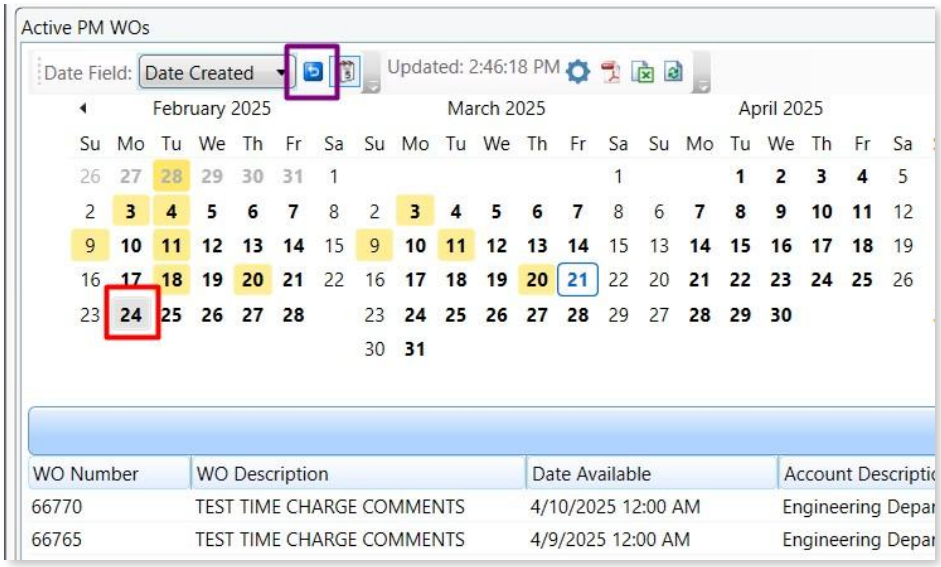
Data Grids and Lists

The Data Grid Widget setup screen allows you to select:

- **Data Source:** Type needs to be *Detailed List* or *View*.
- **Refresh Rate.**
- **Record Count:** How many records the Dashboard will display.
- **Form:** How Work Orders will display on the screen if you open them from the Dashboard.
- ☐ **Show Calendar:** If checked, it requires you to select a relevant date field to highlight on the calendar.



- Click on the ***highlighted date*** to filter out all other Work Orders on the list.
- Click the ***Reset Calendar Filter*** button to remove the filter.



Bookmarks and Links

Bookmarks allow you to provide a list of frequently used links to end users.

- **Create a Bookmark:** click the *new* icon in the bookmarks properties section on the left side of the Widget Settings page.

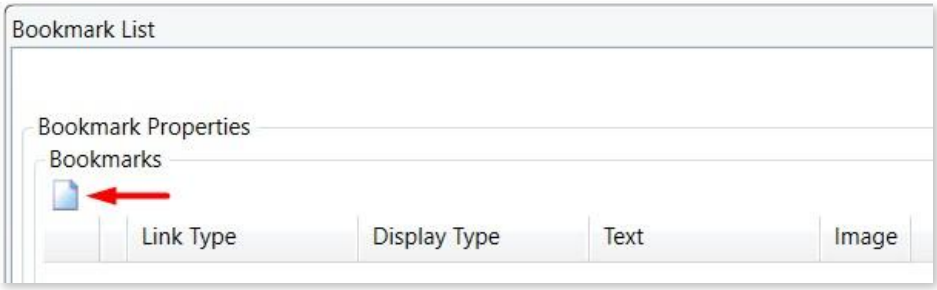
*The bookmark details section opens at the right side of the window

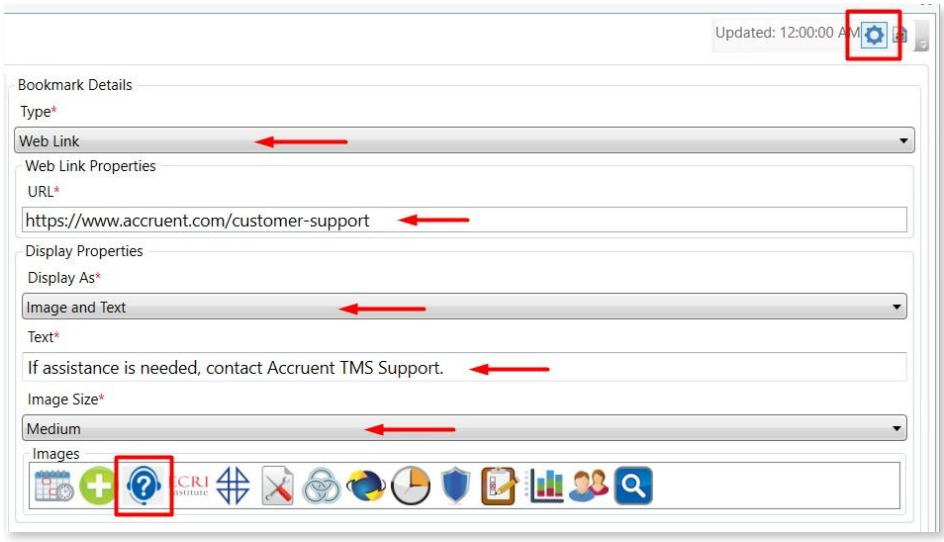
A web link can be created to direct users to useful sites that exist outside of the TMS application.

Examples include:

https://www.accruent.com/customer-support

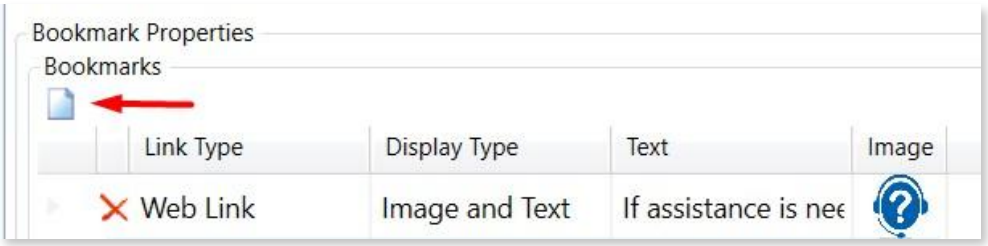
https://home.ecri.org

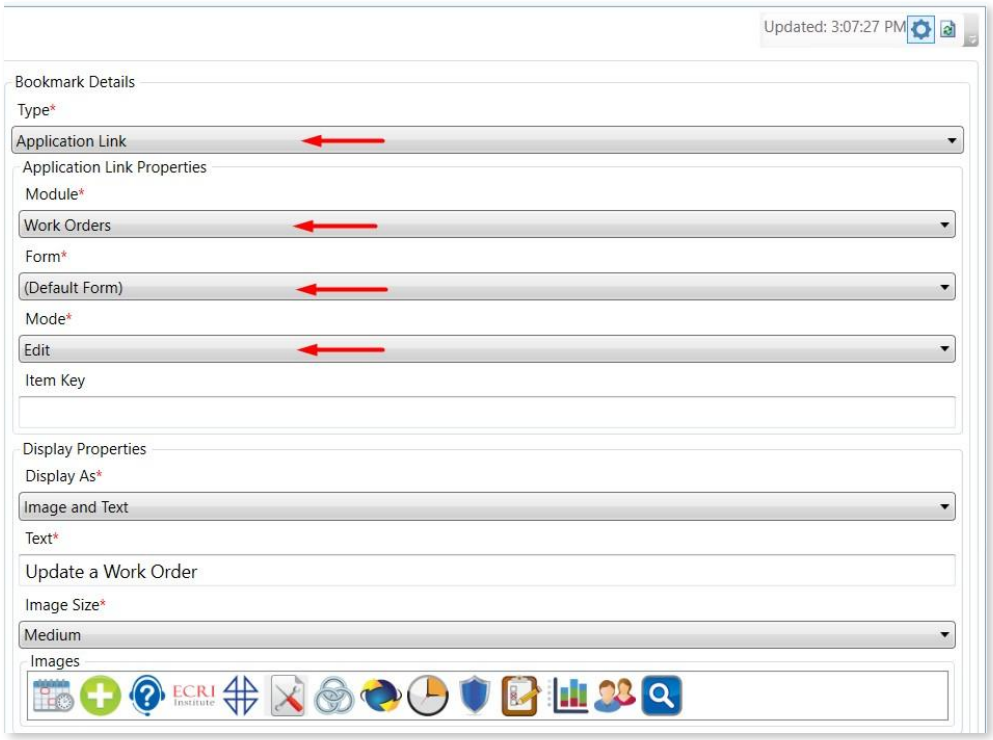




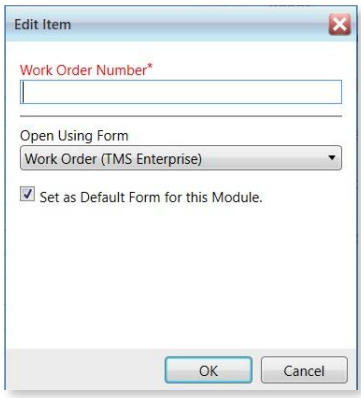
An application link can be created to provide a quick way for users to navigate to different modules and forms within TMS.

The ***Item Key*** field allows you to set the link to a specific Work Order, Asset, PM Schedule or other TMS objects.





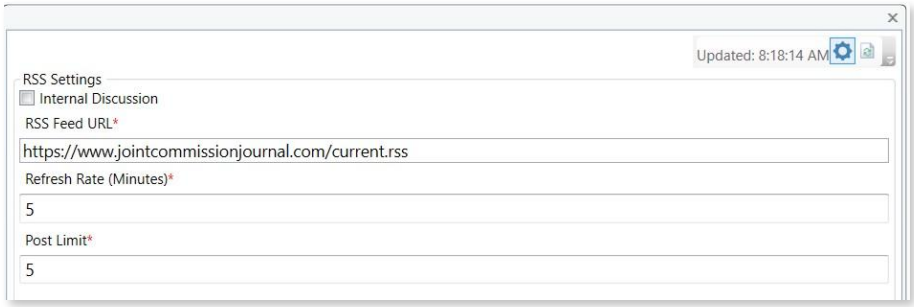
If the *Item Key* field is blank, users will be prompted to enter a number when they click a link. They can also select a different form to open (see below).



RSS Feed and Discussions

The RSS Widget functions as a bulletin board that can be configured to display links to recent articles on the web, such as:

https://www.jointcommissionjournal.com/current.rss

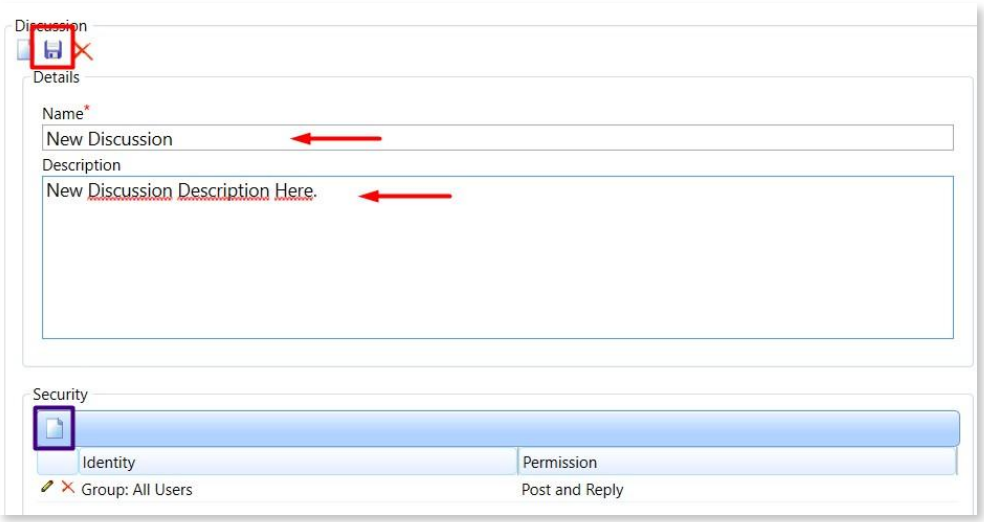


The RSS Widget can also display **Internal Discussions** (more details below).

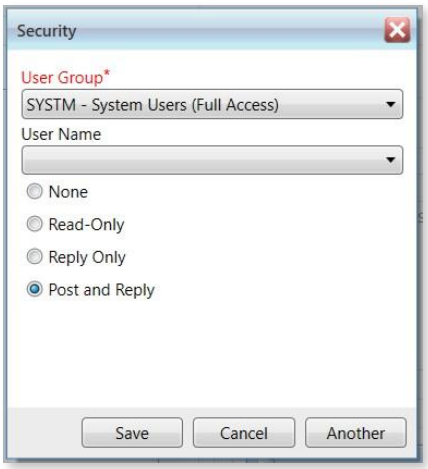
Starting an Internal Discussion

Go to ***Setup > Dashboards > Discussion Setup***. Click the *paper icon* to create a new Discussion.

Add Discussion Name and Description, then hit ***Save***.

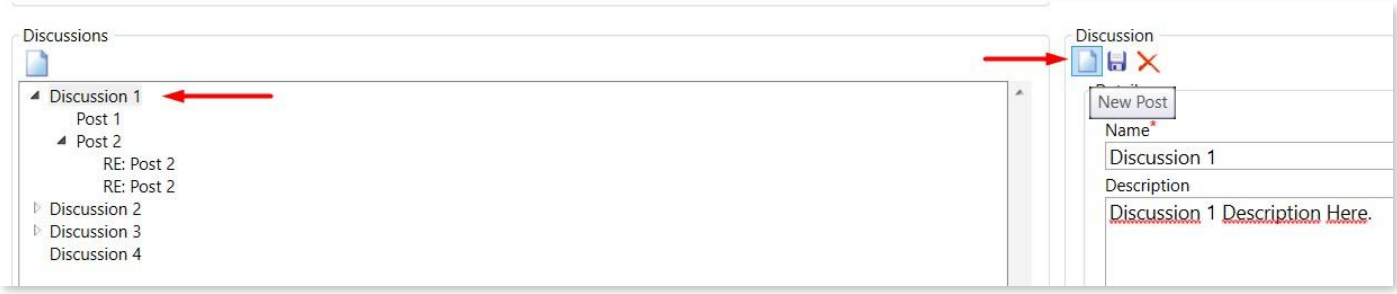


You can also control which users and/or groups will be able to interact with each Discussion by clicking the *paper icon* in the **Security** section.

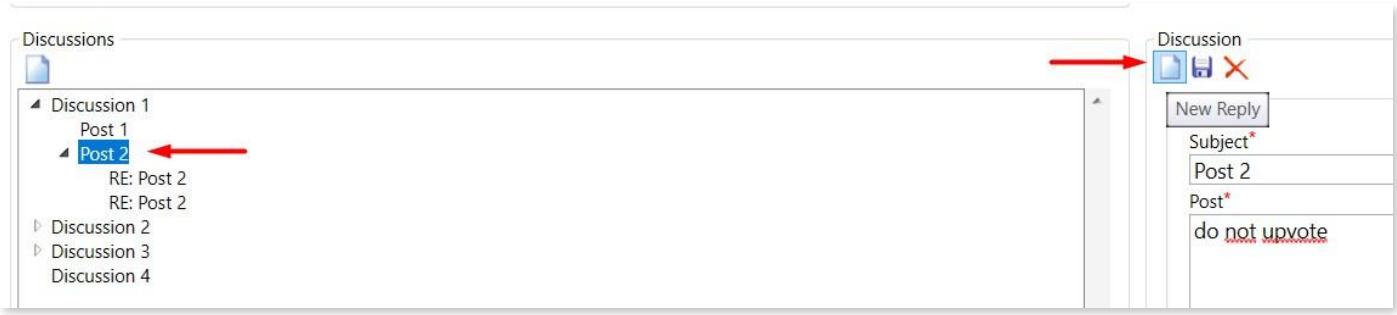


The *paper icon* has different purposes depending on the option selected in the section at the left.

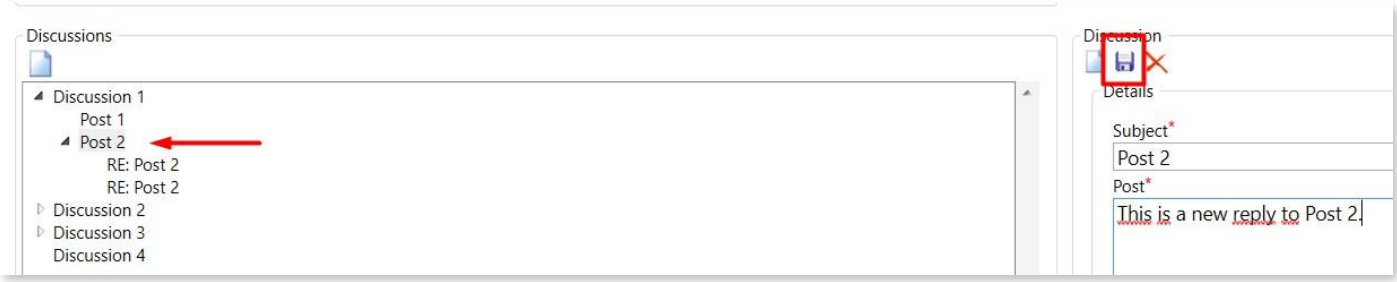
• If a **Discussion** is selected, the *paper icon* adds a new Post to the Discussion.



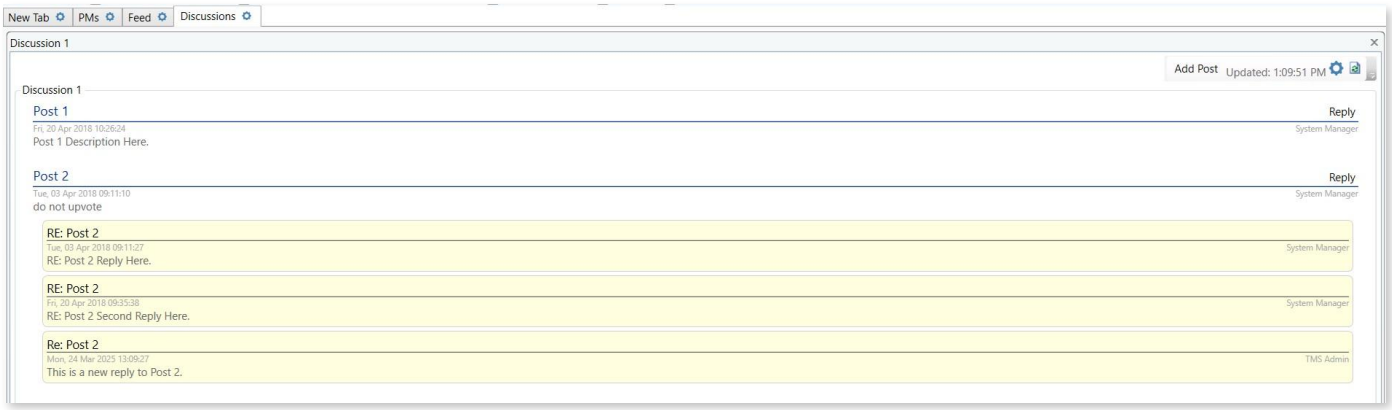
• If a **Post** is selected, the *paper icon* adds a Reply to the Post.



To add a new Post/Reply, or to modify an existing one previously selected, hit ***Save***.



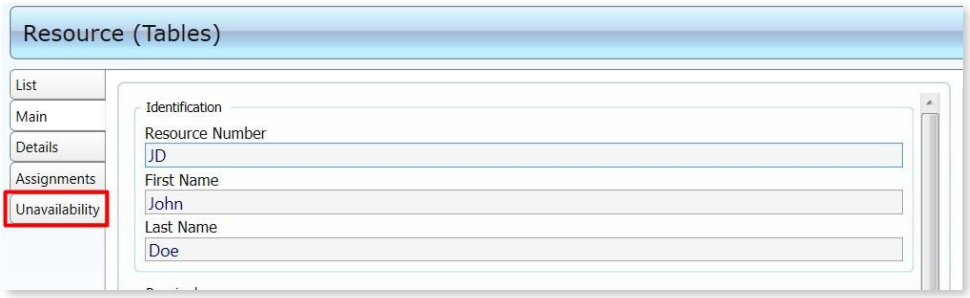
The Dashboard will display the posts within the discussion:

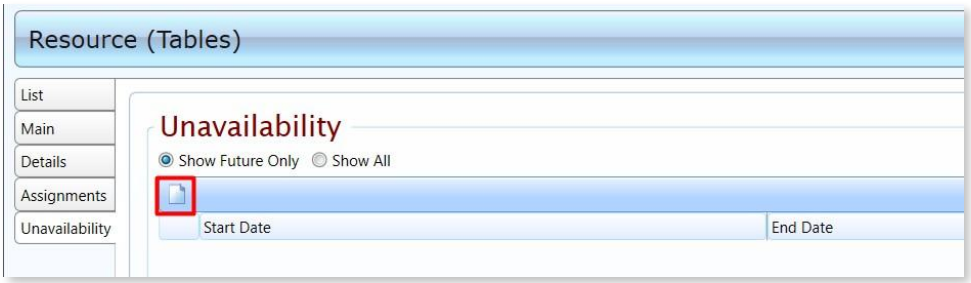


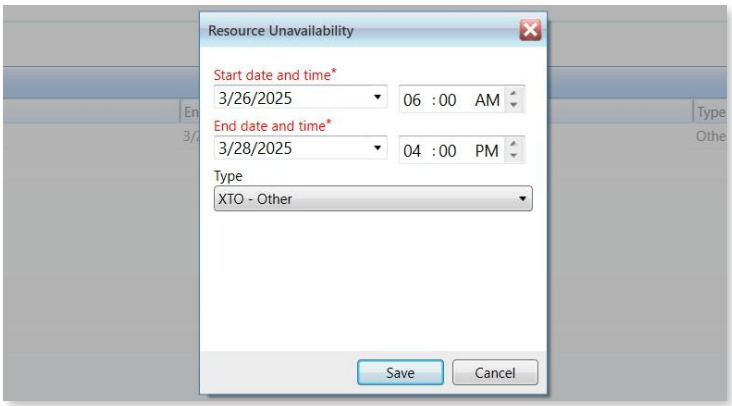
Resource Schedule and Timelines

Set Resource's Unavailability

- Go to **Modules > Resources > Edit/Query** and pull up any Active Resource.
- Click the *Unavailability* tab, then click the *paper icon*.
- Set the *Start* and *End* dates for the employee's leave. The *Type field* is optional (follow the instructions below to create Type options).
- Click ***Save***.

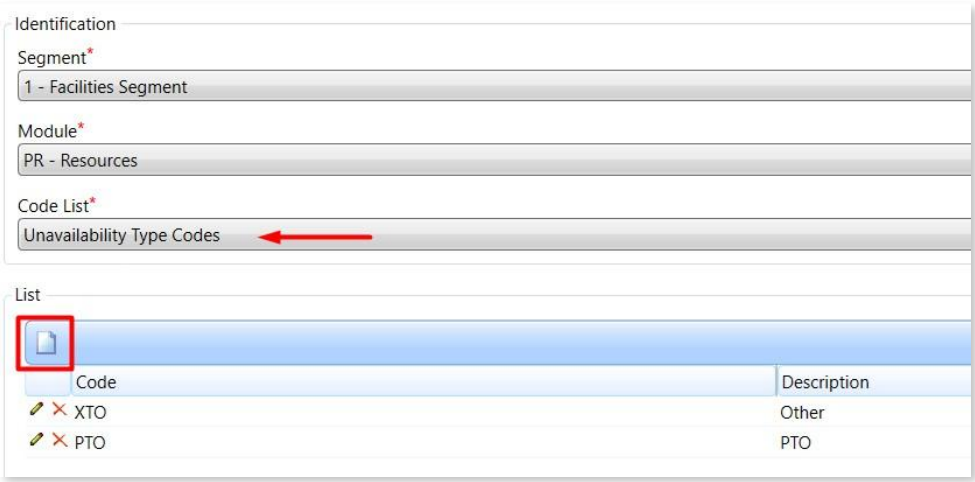




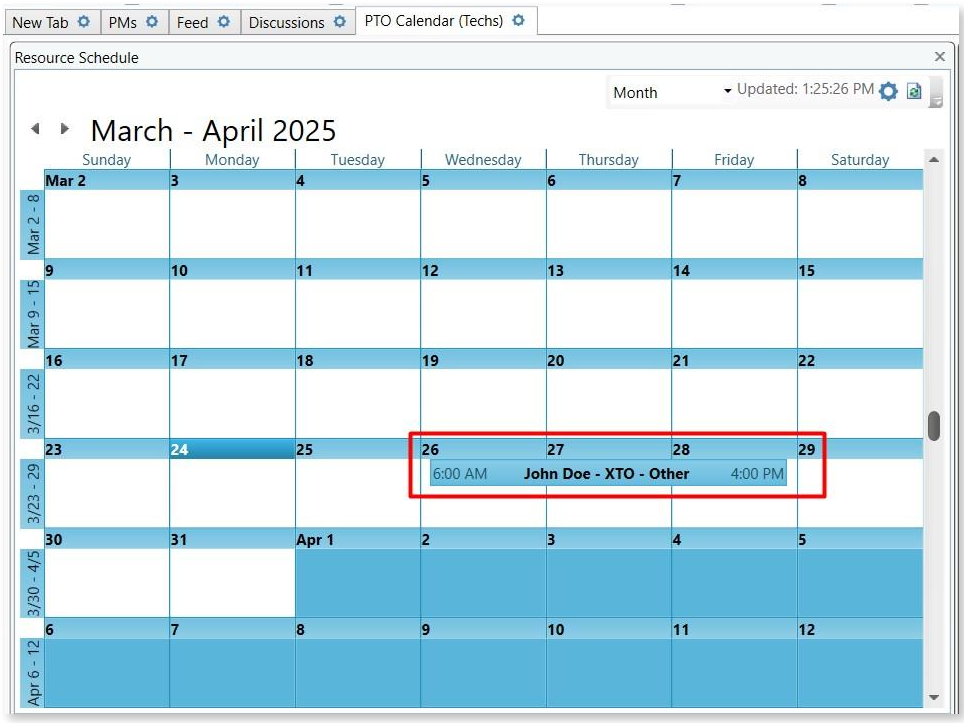


Create *Unavailability Type Codes*

- Go to ***Setup > Resources > Codes***.
- In the *Code List* dropdown, select *Unavailability Type Codes*.
- Click the *paper icon* to add new codes.
- Click ***Save***.

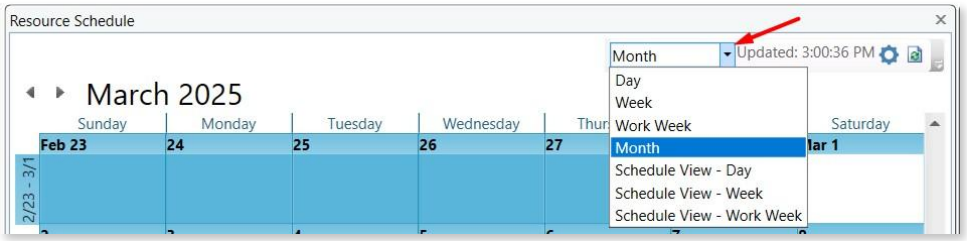


The Resource's unavailability will be displayed on the Dashboard.

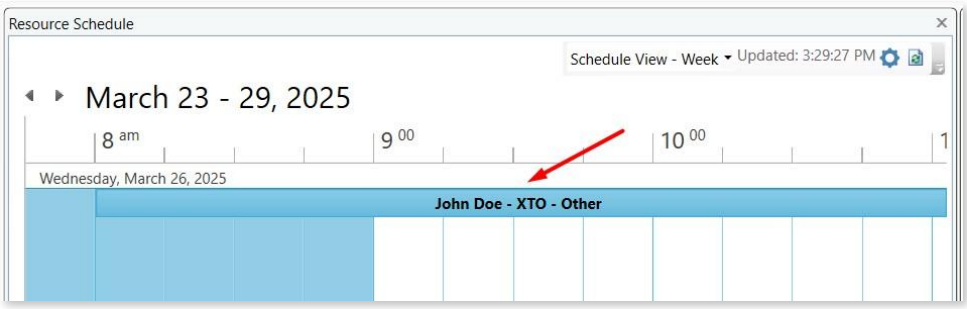


Different Calendar Views include:

- Day
- Week
- Month
- Schedule View – Day
- Schedule View – Week
- Schedule View – Work Week



Note: You can double-click the Unavailability Event on the calendar to open the Resource's record in a child window.

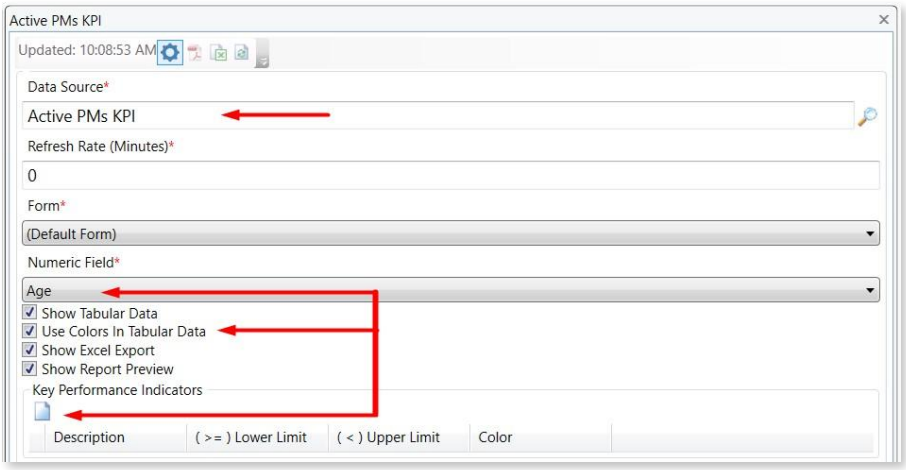


KPI Widget

KPI Widgets allow you to highlight subsets of data on your Dashboard.

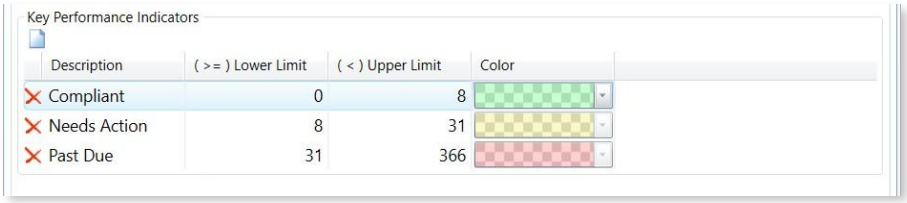
For instance, you can have a *DATEDIFF* function in a Data Source (more details in the next section) calculating the age of Active Work Orders, and then color code the records according to their age.

- Add a *Detailed List* Data Source.
- Check ☑ **Use Colors in Tabular Data.**
- Click the *paper icon* to add KPIs.

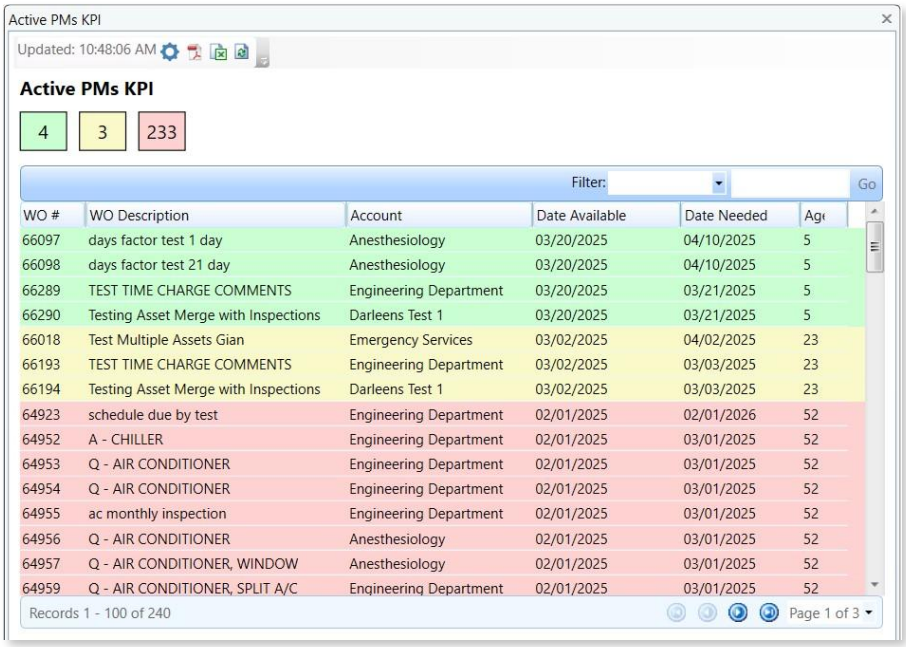


This screenshot is an example of the following color-coding criteria:

- WOs up to 7 days old.
- WOs from 8 to 30 days old.
- WOs from 31 to 365 days old.



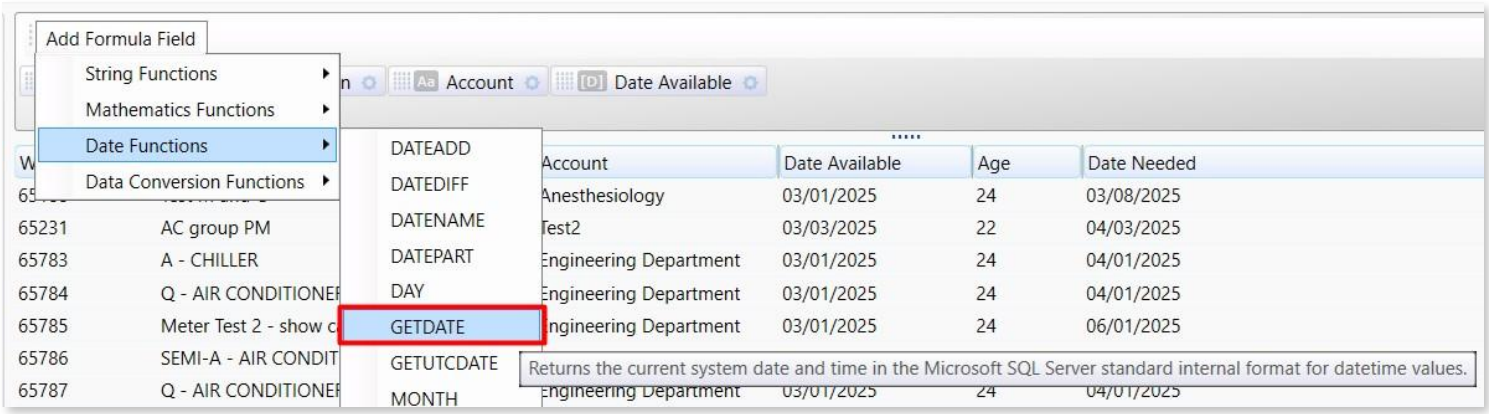
The Dashboard will look like this:



Data Source Date Functions

While editing your Detailed List Data Source, you can add a *Date Function* to calculate the age of the Work Orders displayed.

• Go to ***Add Formula Field > Date Functions > GETDATE***

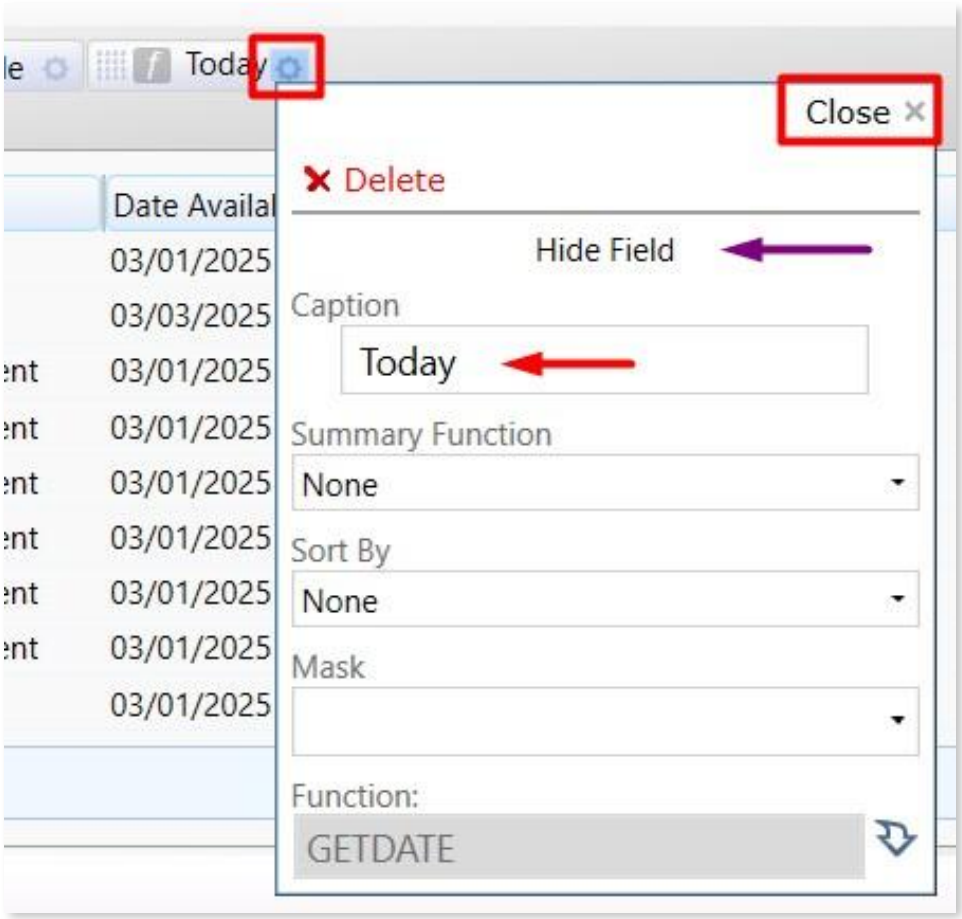


*The Formula Field appears in the Columns section

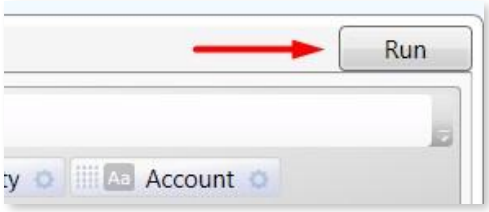
• Click its *gear icon* if you want to rename it.

This field is necessary for the calculation, but it only displays today's date, so you can **hide it**.

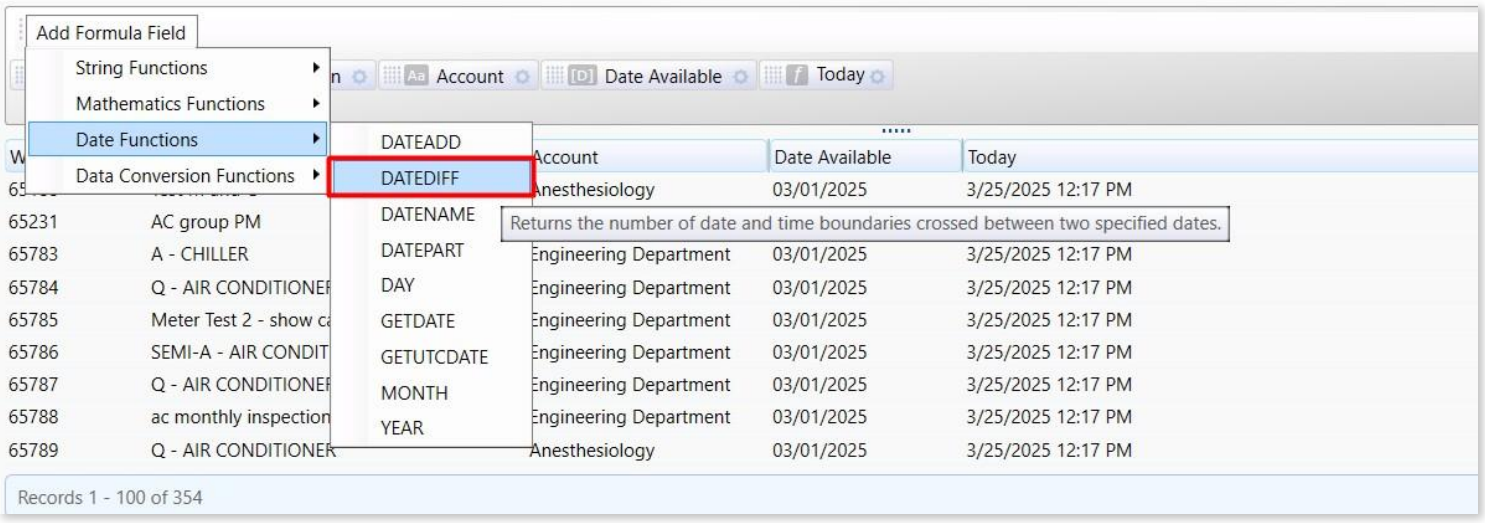
At the end, click ***Close***.



Note: Click the "**Run**" *button at the top right-hand corner* each time a new Formula Field is added.



• Go to ***Add Formula Field > Date Functions > DATEDIFF***



• **Date Part:** the criterion by which the record age will be calculated.

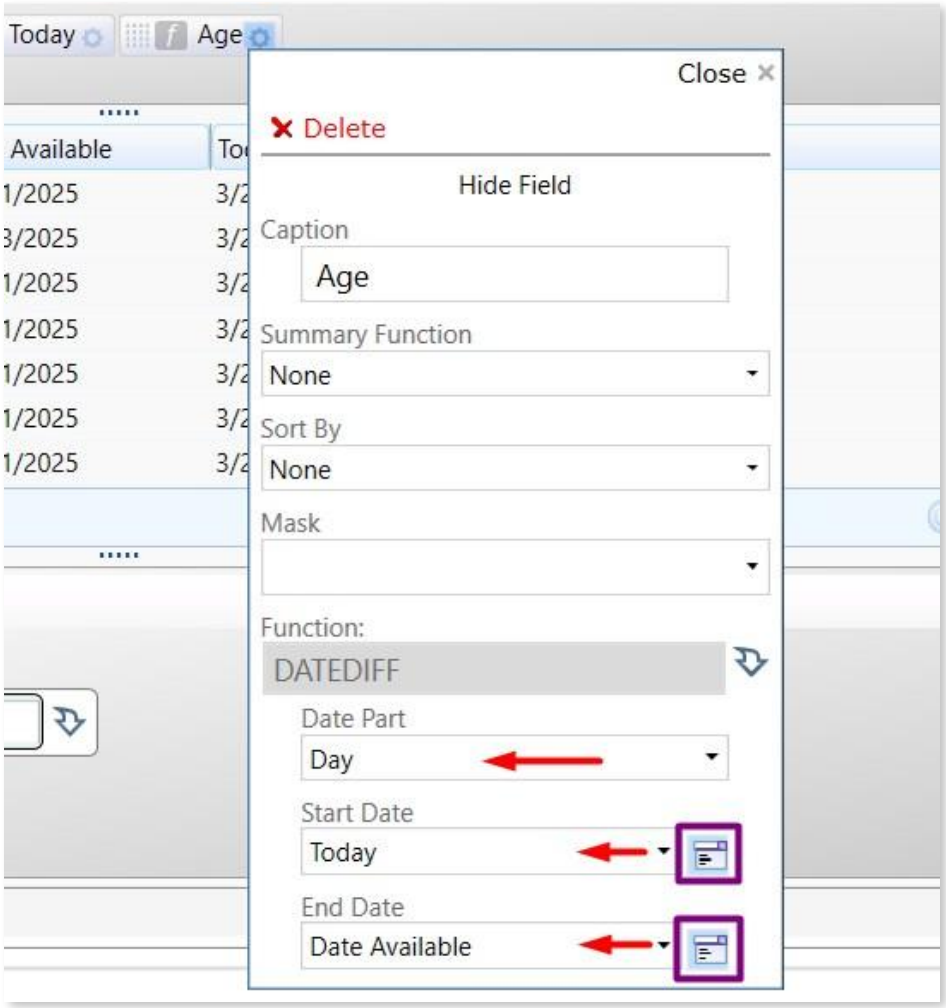
• **Start Date:** Click the **highlighted** icon so that the field turns into a dropdown menu, then select the *GETDATE* field.

(In this example, the field is labeled "Today").

• **End Date:** Click the **highlighted** icon so that the field turns into a dropdown menu, then select the *Date Field* you want to use to determine the record age.

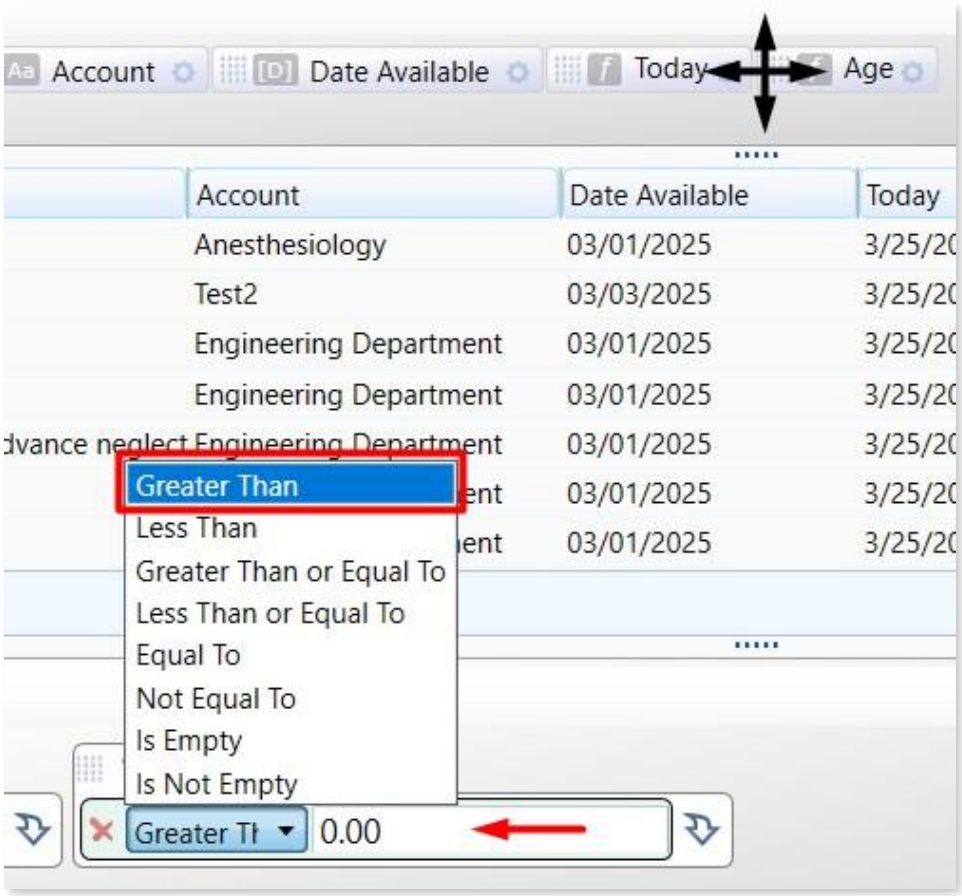
(In this example, *Date Available* is used).

• Click ***Close***.



You can also turn the *DATEDIFF* field into a filter by hovering the mouse cursor over it until the cursor turns into an anchor, then dragging-and-dropping the field into the *Filters* section at the bottom of the screen.

In this example, the parameter is set to ***Greater Than: 0*** to filter out any records whose age is negative (i.e. PMs that have a *Date Available* value set in the future).

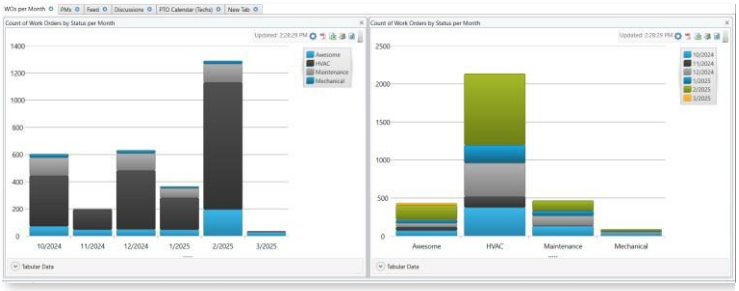


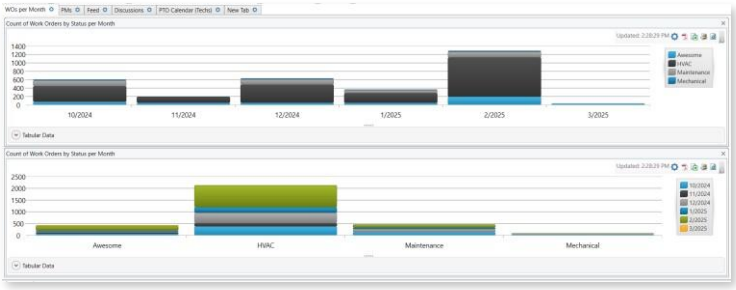
Widget Sizing and Arrangement

In the current version of TMS, Widgets are automatically sized.

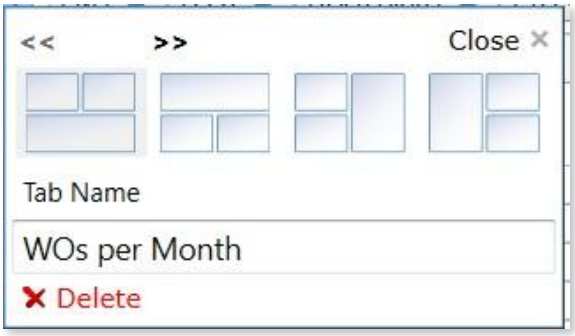
For **tabs with a single Widget**, TMS will auto adjust the Widget so that it fills the entire tab. For cases with 2, 3 or 4 Widgets, you can manually arrange them by clicking the *gear icon* and choosing from the arrangement options below:

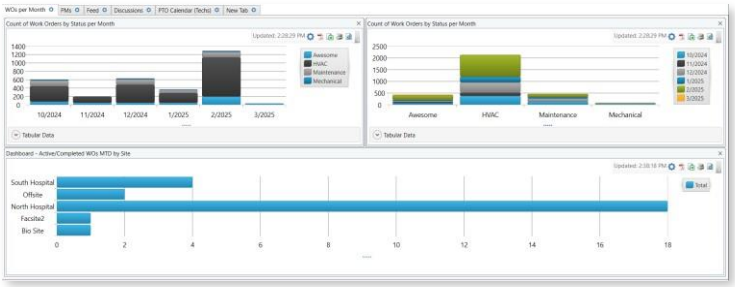
- **2 Widgets:** Vertical side-by-side or horizontal one-over-one arrangement.

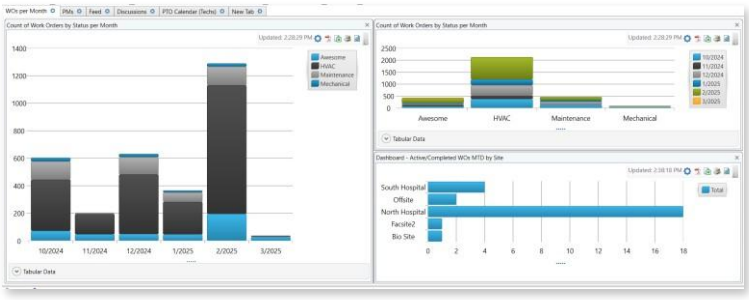




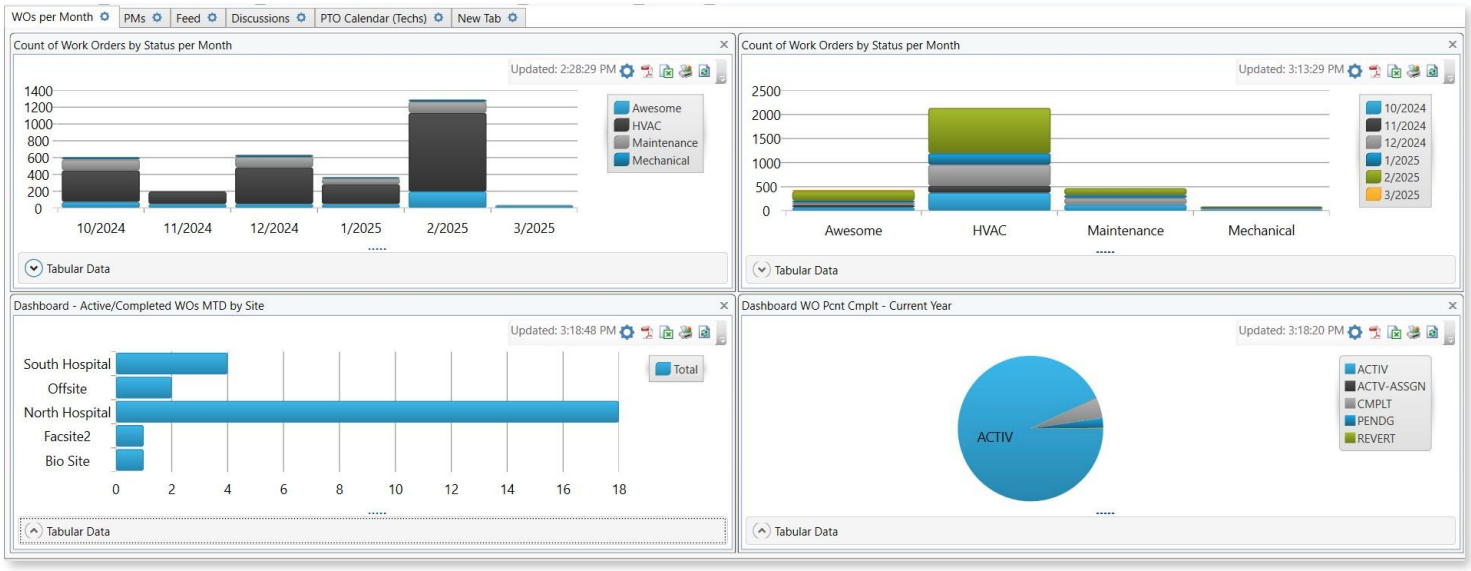
- **3 Widgets:** You can set 2 smaller Widgets above or below a longer horizontal one or set them next to a longer vertical one.



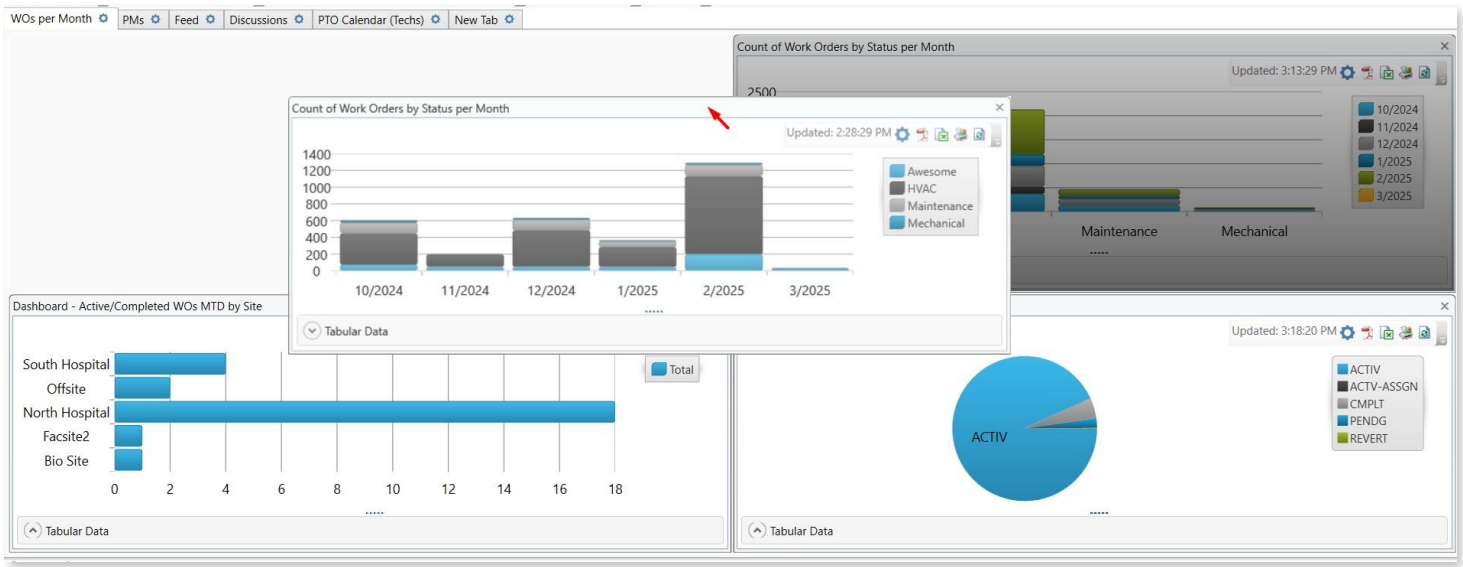




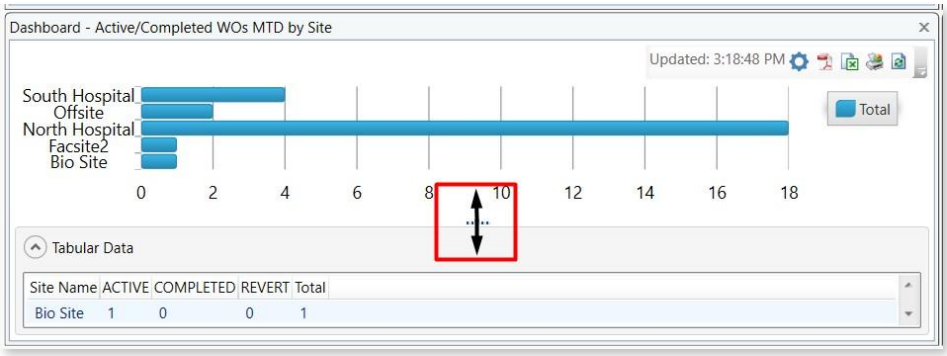
- **4 Widgets:** TMS sets the layout with a Widget in each corner of the tab.



Note: To change the placement of Widgets, grab then drag-and-drop them where you want them.



Note: With Graph Widgets, you can adjust the size of the chart *vs* the tabular data within it by placing your cursor over the four dots below the graph, clicking and dragging to your desired location.

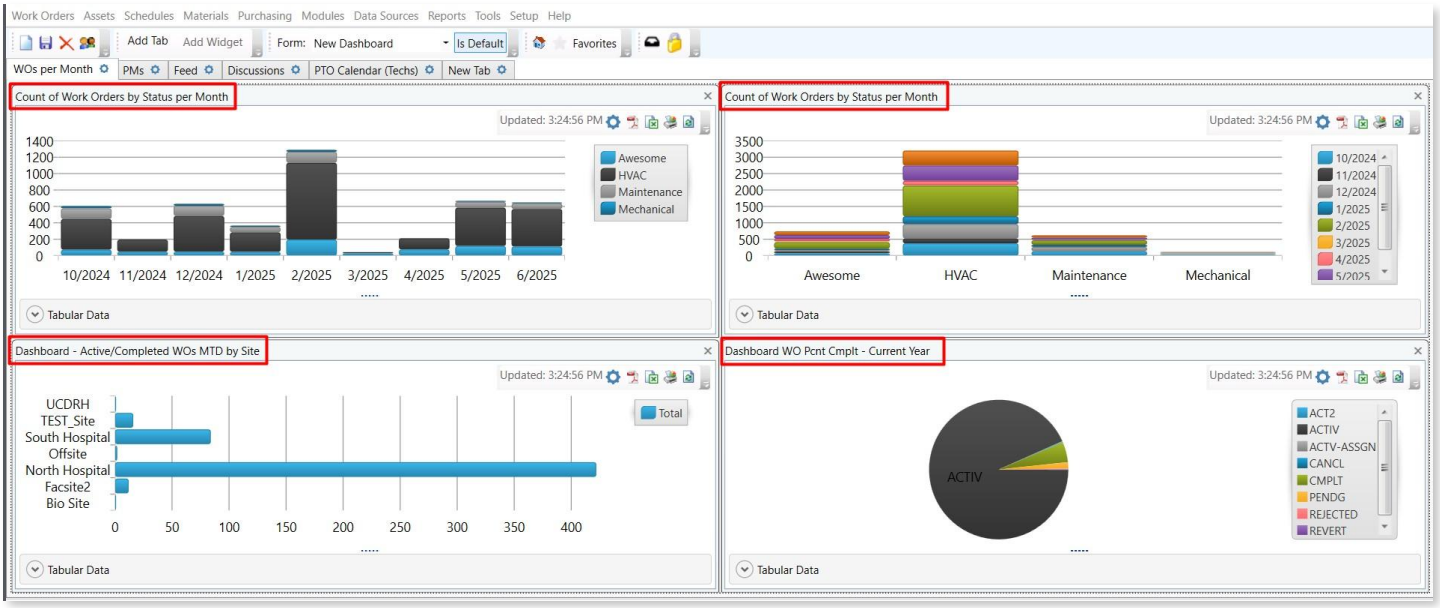


Frequently Asked Questions (FAQ)

- **Why isn't the Dashboard showing the Work Orders/Time Charges/Assets I expect?**

This usually means that your Data Source is not set up correctly. It may be filtering on the wrong fields or pulling data from the wrong tables. Please see our documentation on Data Sources for more specific guidance.

Note: Each Dashboard Widget features the name of its corresponding Data Source at the top left corner, so if you want to edit the data being displayed, take note of the Data Source name, then search for it in *Data Sources* > *Edit* or *Data Sources* > *Query*.



- **Why can't I click the *blue gear* icon to edit the Dashboard or Widget? Why is it grayed out?**

If you cannot use the gear icon, you have not been given *Modify* permission on the Dashboard you are trying to edit.
You can either ask the Dashboard owner to grant you permission, or create your own new Dashboard based on the existing Dashboard.

- **Why does another user's Dashboard load when I log in?**

This may indicate that your defaults have been set incorrectly. Click the dropdown field labeled *Form*: and select the correct Dashboard. Click *Is Default* to set the current Dashboard as your default.

• I set my default Dashboard, but it still loads the wrong one when I log in.

If you are still directed to the incorrect form, your dashboard may have been created in the wrong segment. To verify, an administrator will need to go to *Setup > Form Manager*. Select the appropriate segment and Module *DH – Dashboard*.

If the Dashboard does not appear in your default Segment, you will need to create a copy of your Dashboard in the correct Segment.

• Why does the system crash when I go to the dashboard module?

If you have lost *View* permission on your default Dashboard, the system will eject you and shut down when you try to access it. This may also indicate that you have lost access to a Segment. Please contact TMS Support at 877 345 3999 for further assistance.

• What do the icons in the widget mean?

Preview report
(generates pdf w/o chart).

Export report data to Excel
(generates excel files w/o chart).

Print chart

Refresh data

• Can I use a SQL overridden Data Source on a Dashboard?

Yes, but with some caveats. A SQL overridden Data Source can be added to a Dashboard the following way:

1: Create a standard Detailed List Data Source (the columns won't matter; simply save it).

2: Add the Data Source to a Dashboard Tab and save the Dashboard.

3: Go back to the Data Source (***Data Sources > Edit*** or ***Data Sources > Query***).

4: Click Data ***Source Editor > SQL > Override SQL***, then add the desired SQL, then hit *Save*.

5: Return to the Dashboard (***Modules > Dashboard***).

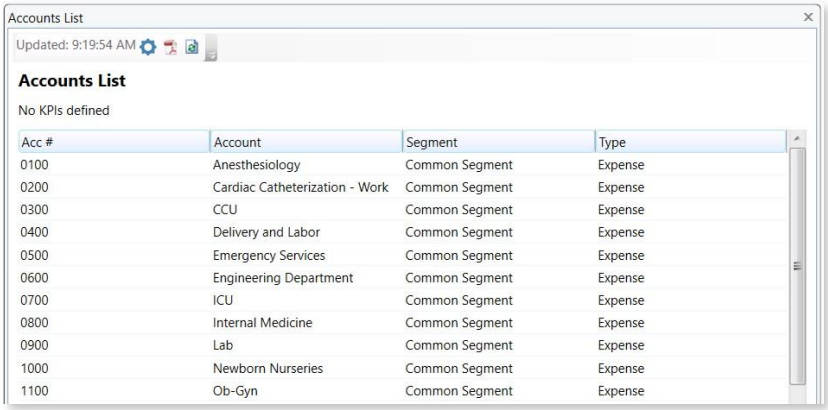
6: The Data Source/Dashboard will now display data according to the SQL override.

Example Dashboard with a SQL overridden Data Source:

SQL Code:

```
SELECT
a.AccountCode AS [Acc #],
a.AccountDescription AS [Account],
a.SegmentDescription AS [Segment],
a.TypeDescription AS [Type]
FROM vAccountCodes a
WHERE a.SegmentDescription = 'Common
Segment'
```

Result:



Acc #	Account	Segment	Type
0100	Anesthesiology	Common Segment	Expense
0200	Cardiac Catheterization - Work	Common Segment	Expense
0300	CCU	Common Segment	Expense
0400	Delivery and Labor	Common Segment	Expense
0500	Emergency Services	Common Segment	Expense
0600	Engineering Department	Common Segment	Expense
0700	ICU	Common Segment	Expense
0800	Internal Medicine	Common Segment	Expense
0900	Lab	Common Segment	Expense
1000	Newborn Nurseries	Common Segment	Expense
1100	Ob-Gyn	Common Segment	Expense

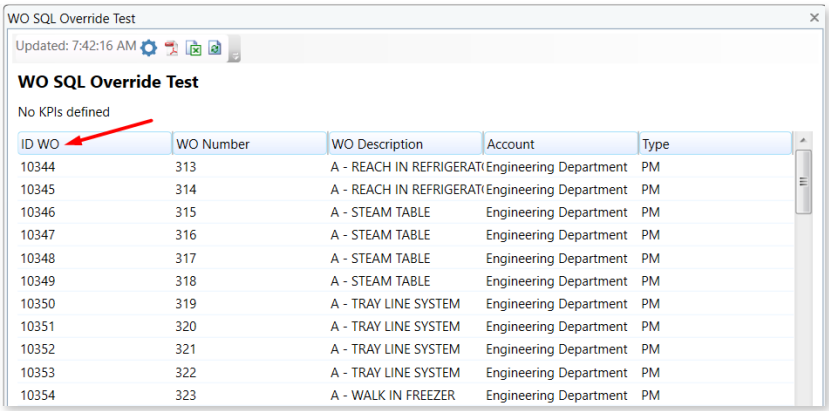
IMPORTANT: Though users can view data from a SQL overridden Data Source on Dashboards, they should **NOT** click-open records from it. Opening records will result in either the wrong records appearing, or an application crash.

The only way to resolve this is to add the **ID field** from the Data Source's main table as the first column in the Data Source.

SQL Code:

```
SELECT
w.IDWorkOrder AS [ID WO],
w.WONumber AS [WO Number],
w.WODescription AS [WO Description],
w.AccountDescription AS Account,
w.TypeCode AS Type
FROM vWorkOrders w
WHERE w.IDSegment = 1
AND w.TypeCode = 'PM'
ORDER BY w.WONumber ASC
```

Result:



ID WO	WO Number	WO Description	Account	Type
10344	313	A - REACH IN REFRIGERAT	Engineering Department	PM
10345	314	A - REACH IN REFRIGERAT	Engineering Department	PM
10346	315	A - STEAM TABLE	Engineering Department	PM
10347	316	A - STEAM TABLE	Engineering Department	PM
10348	317	A - STEAM TABLE	Engineering Department	PM
10349	318	A - STEAM TABLE	Engineering Department	PM
10350	319	A - TRAY LINE SYSTEM	Engineering Department	PM
10351	320	A - TRAY LINE SYSTEM	Engineering Department	PM
10352	321	A - TRAY LINE SYSTEM	Engineering Department	PM
10353	322	A - TRAY LINE SYSTEM	Engineering Department	PM
10354	323	A - WALK IN FREEZER	Engineering Department	PM

In the example above, users should be able to click-open records, as the first column is the ID field from the Data Source's main table (vWorkOrders).

Info / Contact Support

DASHBOARDS – How to Create/Edit Dashboards in TMS

June 2025

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