Dashboards User Manual

Performance dashboards extension for ReadyMembership

Version 1.0

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Changes

Version	Date	Who	Description
1.0	21/Dec/2021	Steve Dowle	Original version

Introduction

The dashboard extension allows you to define and visualise information and statistics relevant to yourself or on a particular subject matter on a single screen, based on data collected within ReadyMembership. These dashboards can be shared with colleagues

This guide will cover

- How to create a dashboard and populate with widgets
- How to share dashboards and control who can change it
- Specific dashboard widgets to use on your dashboards

At a glance functionality

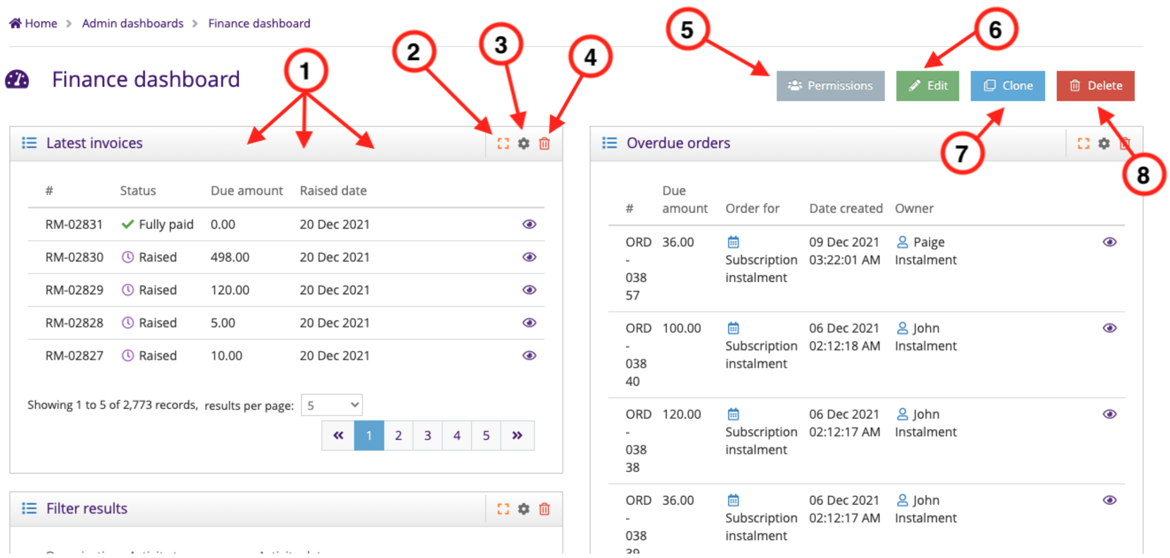
Dashboard features

- Create any number of dashboards
- Keep private or share amongst other admin users either by group or specifically, and grant read or edit permissions
- Set a dashboard to be your homepage
- Add widgets from an existing library onto a dashboard
- Configure the overall dashboard layout and drag and drop widgets to customise the layout

Dashboard widgets available

- Filter widget - Allows you display the results of executing a filter against data and configure which fields are displayed

Overview of using dashboards



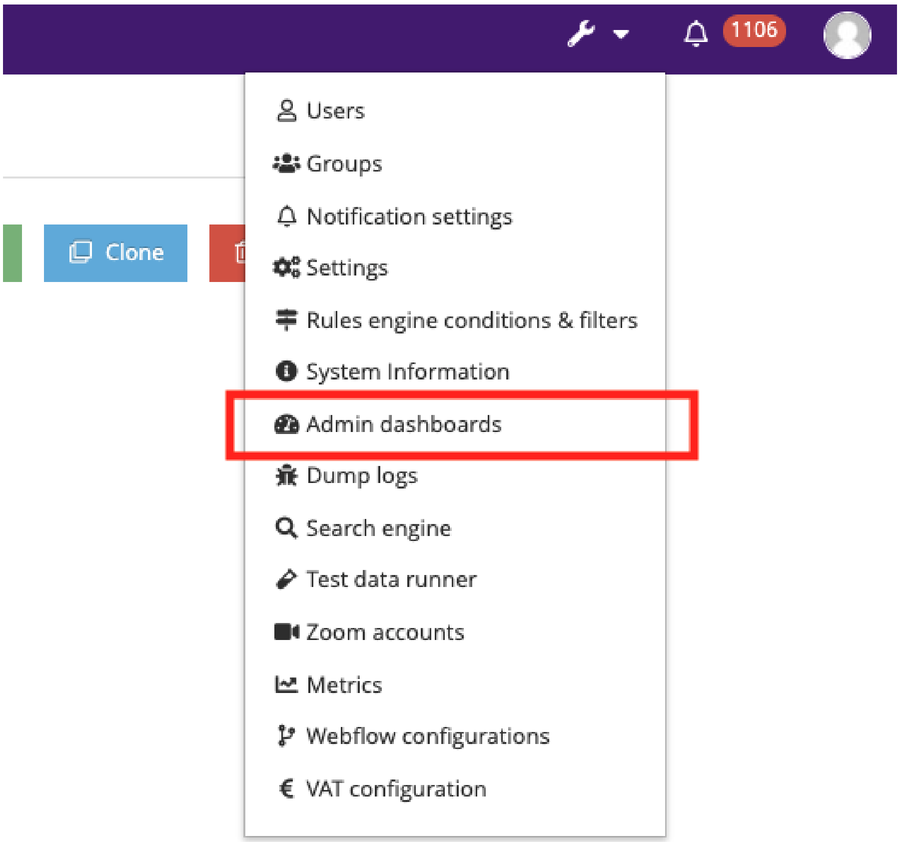
1. **Drag & Drop widgets** - You can re-order widgets in your dashboard by holding your mouse button over the widget title bar and dragging the widget to a new position
2. **Full screen** - sometimes things can get a little cramped, so clicking on the full screen icon will maximise the current widget
3. **Configure widgets** - change the information and look of the widget
4. **Delete a widget** - removes the widget for good from your dashboard
5. **Share a dashboard** - use permissions to share which admin users get to view or edit your dashboard
6. **Edit a dashboard settings** - these are the overall settings for the dashboard
7. **Copy the dashboard** - this will clone the dashboard and all the widgets within it
8. **Delete the dashboard** - this will delete the entire dashboard and widgets, assuming you have permission.

Viewing & Sharing dashboards

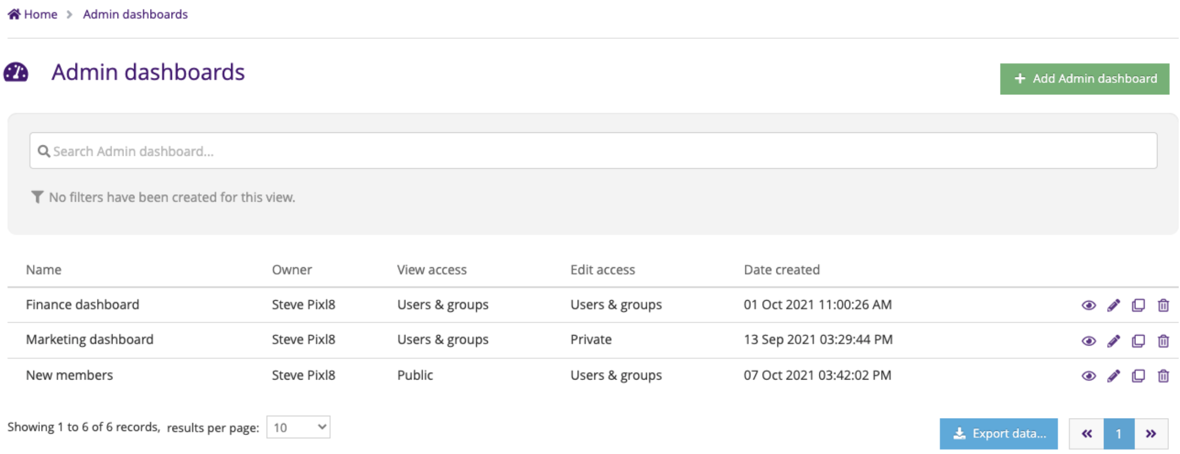
Not only do you have dashboards which you have created, but you could also have access to dashboards that others have shared with you

Seeing all the dashboards you have access to

Located under the settings menu, you'll find a menu item called **Admin Dashboards**



Clicking on it, you'll see a screen with all of the dashboards you can access. If you have created a dashboard you'll be designated as the owner of it, otherwise you'll be able to see who it was created by. You can also see the permissions for each dashboard in terms of who can view it, and who has the ability to edit the contents of the dashboard



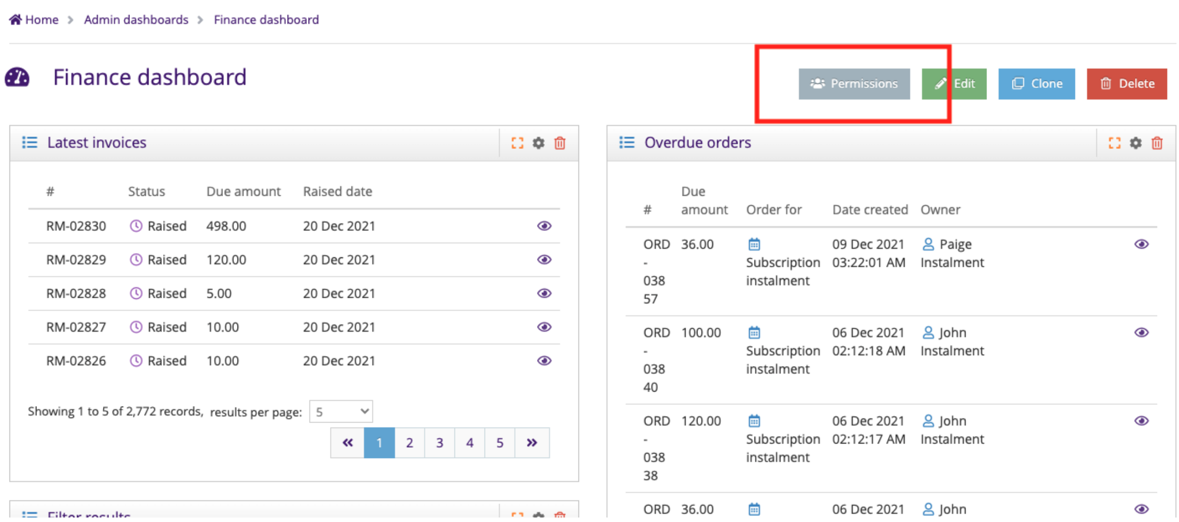
To view a dashboard, simply click on the *eye* icon next to it. If you have the permission to be able to edit it, the *pencil* icon will be enabled, and if you are the creator of it, then you'll also be able to delete it by clicking on the *trashcan* icon.

Sharing a dashboard

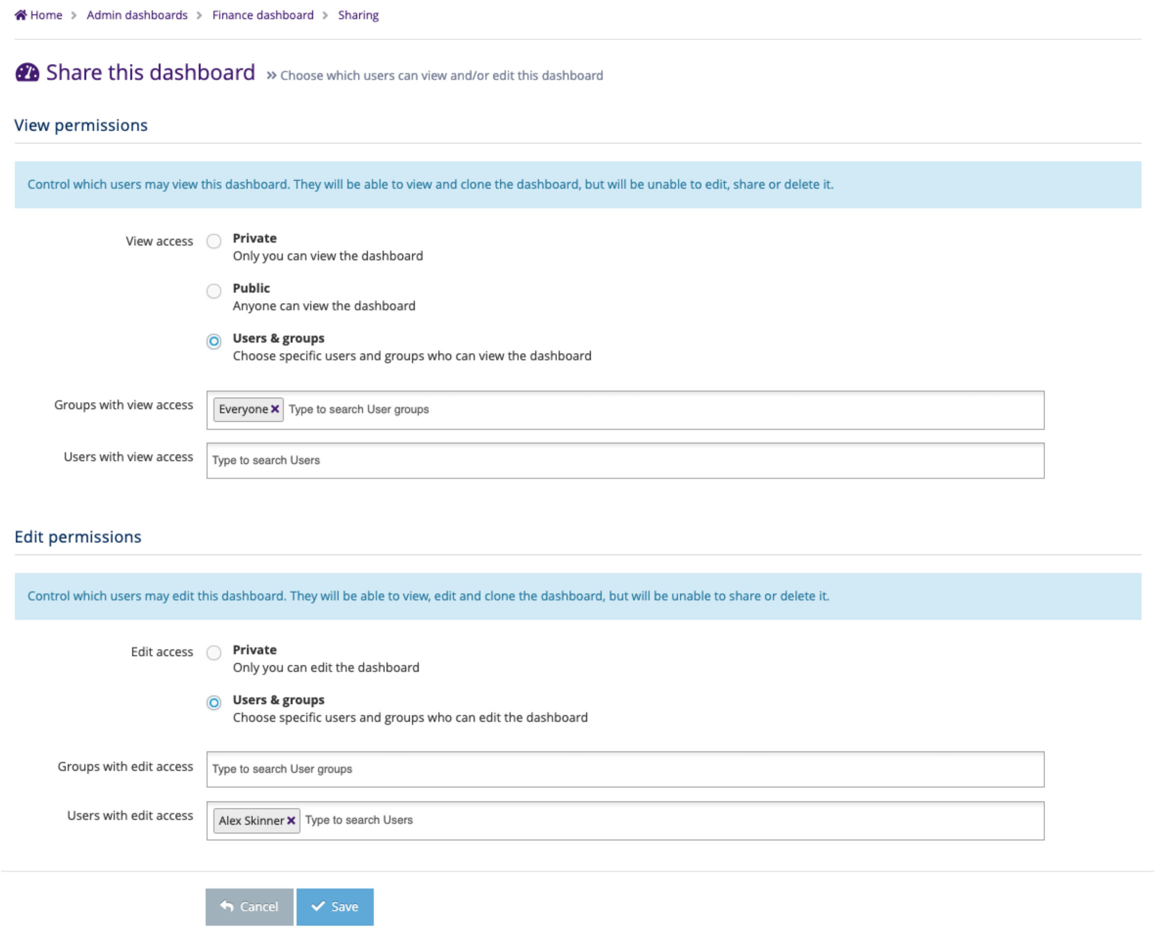
You are able to share dashboards which you have created with other admin users. You can give people just the ability to see it, or give them rights to be able to change it. When you share a dashboard, then other users will see it on their list of dashboards.

Setting dashboard permissions

To change permissions for a dashboard, first view it and then you'll see a button called **Permissions**



This will then take you into the permissions screen for this dashboard



The screen is divided into two types of permissions:

- **View access** - anyone with this permissions can view this dashboard and see all the widgets within it, but cannot change any of the information or edit any of the permissions for it
- **Edit access** - anyone with this permission can view the dashboard and also change the dashboard settings and widgets - adding new ones, editing/removing existing ones etc.

For each of the permission types you can specify who gets this permission

- **Private** - this is the default permission when you create a dashboard. This means that only you can view or edit the dashboard. No one else will be able to see it or know it exists.
- **Public** - this is only available for the view permission, and means that all admin users will be able to see this dashboard whether they are an existing admin user or get added in the future
- **Users and groups** - Admin users often belong to permission groups for example you

may have an admin group for content managers and a separate group for CRM administrators. You can specify which admin groups get access to this dashboard and/or which specific admin users get access to it. When you add or remove admin users from an admin group, then this will automatically also be reflected in their permission to this dashboard as well.

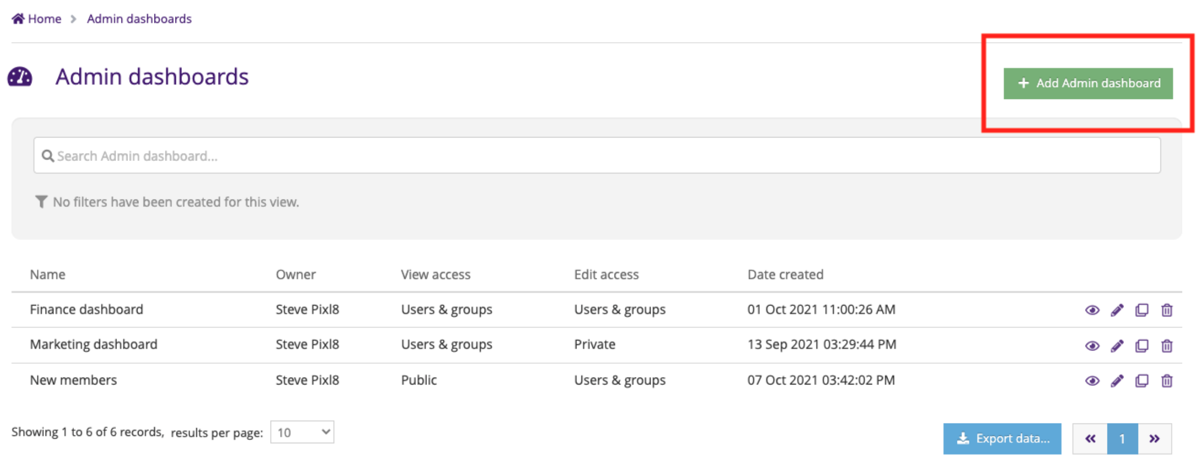
You'll need to save the changes before this will take effect.

Creating dashboards

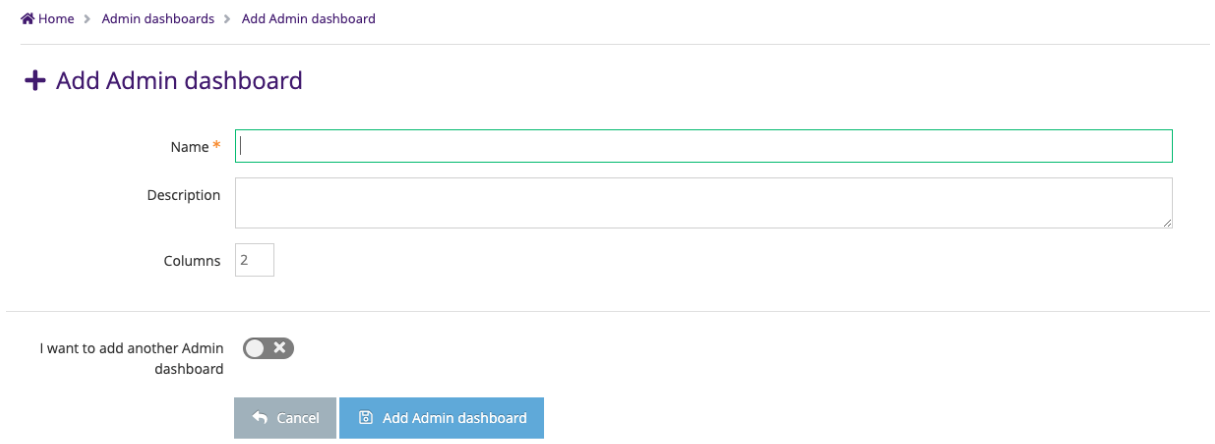
Creating dashboards can be split into two parts, first of all is the overall dashboard and then the fun bit which is adding and arranging your widgets onto it.

Creating a dashboard

From your **Admin dashboard** area which is located under the settings menu, you'll find a button called **Add Admin Dashboard**



Clicking this you'll see a pretty basic screen which allows you to configure your new dashboard. There's nothing shown here which can't be changed at a future date, so you don't need to worry about getting it correct from the outset.



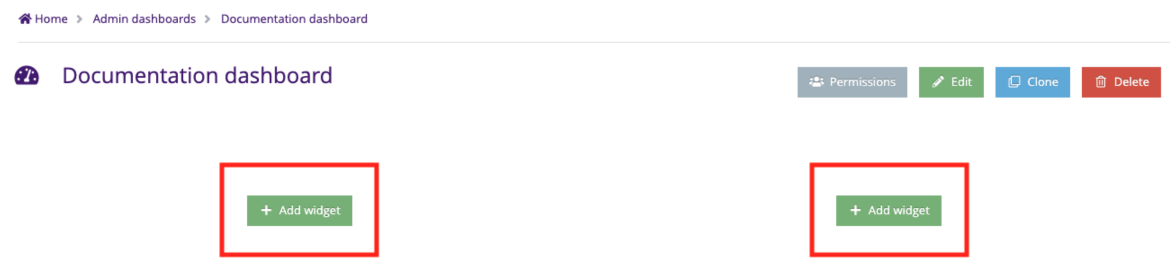
The settings you can add are:

- **Name** - this is the title which will be displayed as the heading for your dashboard and also on the listings of dashboards yourself and everyone can see, so try and keep it descriptive
- **Description** - this is currently not displayed anywhere
- **Columns** - By default your dashboard will have two columns to show your widgets. If you intend to use widgets that require a wide view then you may need to change this to one, but generally two makes sense. If you do reduce the size of this at a future date, then the widgets which were in the column that is no longer there will simply be shifted to be at the end of the previous one, so nothing is lost.

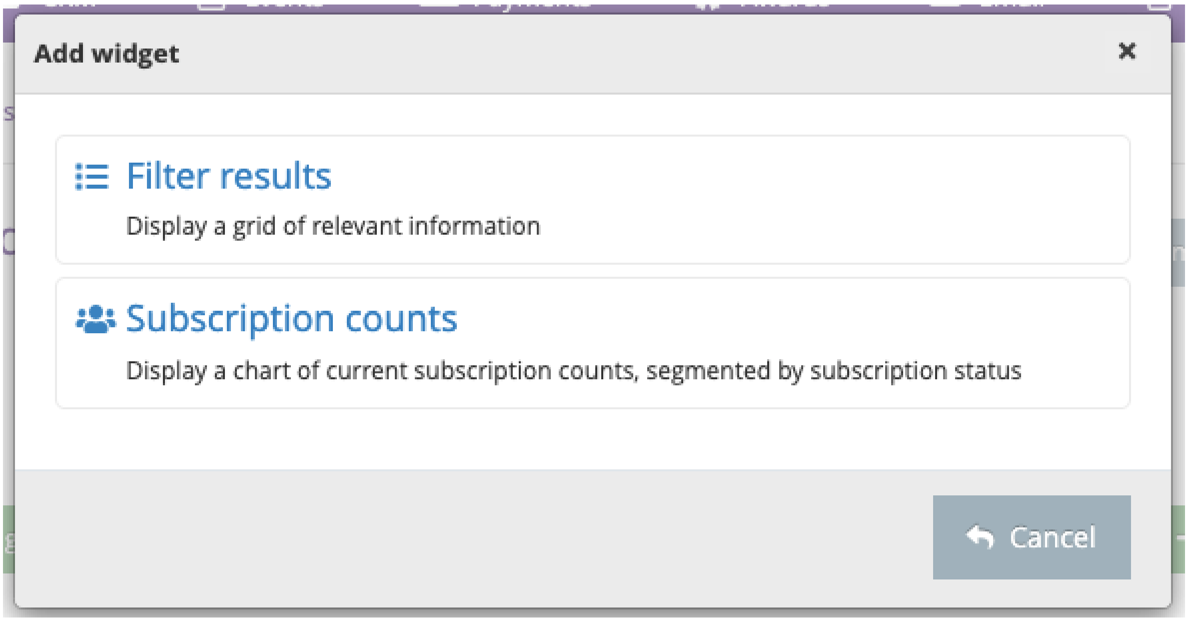
Click **Add Admin dashboard** to save your new dashboard. By default your new dashboard will be private to yourself, so you'll need to edit the permissions to share it.

Adding widgets to a dashboard

As promised, this is the fun bit. When you initially create your dashboard, there will be nothing shown on it, so you now need to start to fill it up with the widgets you want the dashboard to depict.



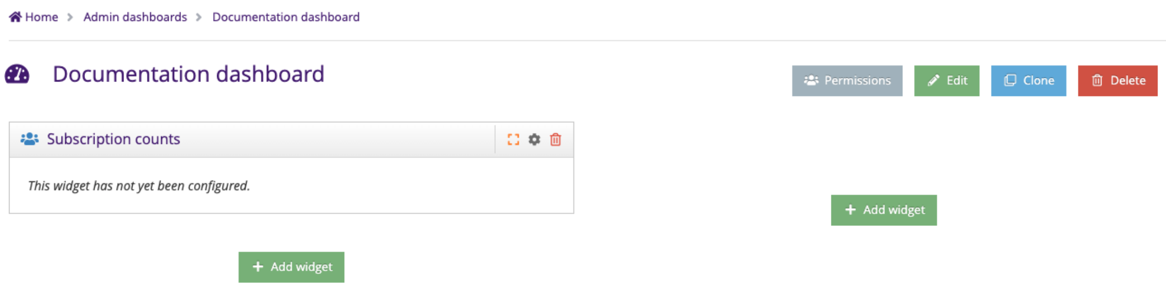
For each of the columns in your dashboard, you'll see a button that says **Add widget**. When you click on this you'll see a list of widgets that you can add.



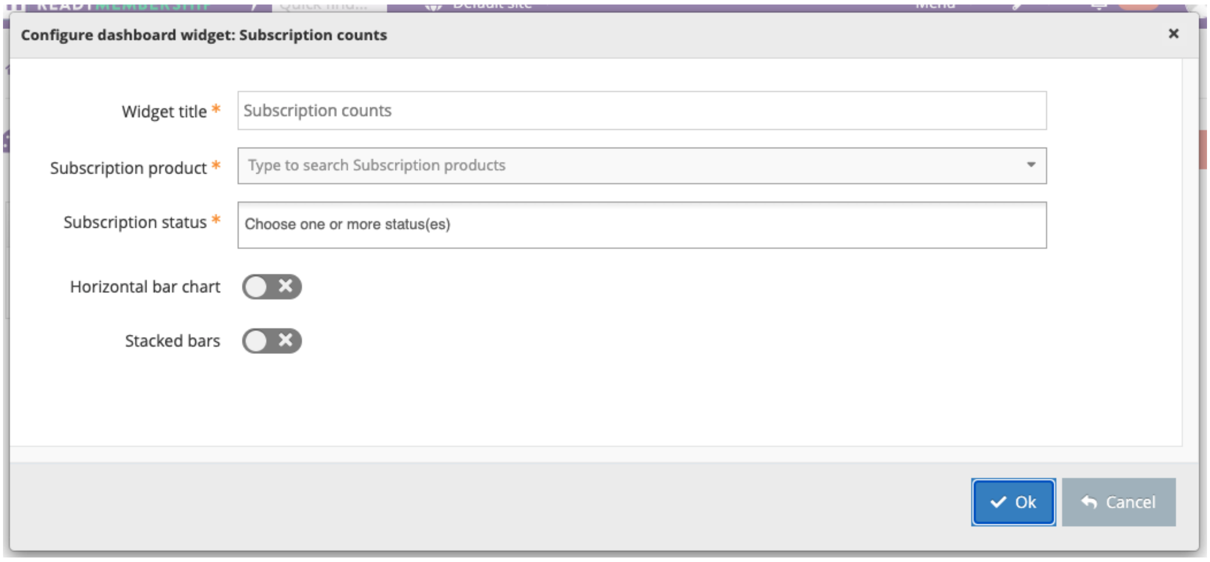
The number of widgets available depend on the features you have installed on your website and any customisations you may have.

We'll cover specific widgets in the next section, but the principle of adding and configuring widgets is the same no matter what widget you are using.

To add a widget, simply click on the one you want to add. This will then take you back to your dashboard and you'll see your new widget has been added.



Typically a widget has little if no default configuration, so the next thing you'll need to do is to configure it. So click on the **cog** icon to bring up the widget settings



The configuration for a widget depends on the type of widget you are configuring, the only common setting is the Widget title, which will be displayed when the widget is shown on the dashboard.

Once you have made your changes, click on the **OK** button, and then the dashboard will be updated with the changes you've made.

There are no limits on the number of widgets you can add to a dashboard, and you can drag and drop them to re-order them, as well as delete individual widgets.

Any changes you make will be automatically saved, and anyone who has access to your dashboard will immediately see the changes as well.

Dashboard widgets

A dashboard without any widgets on it is like an empty plate. In this section we'll explain what each of the widgets does and how to use them

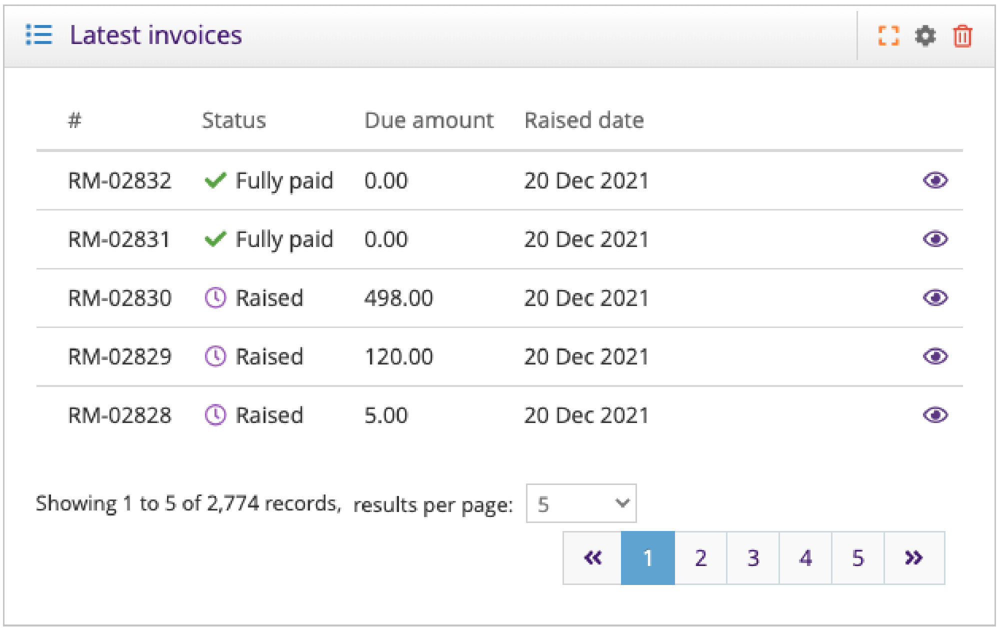
Filter Results

The filter results widget allows you to see a segmented snapshot of any data held in ReadyMembership. You can currently get most of this information already by going to particular areas of ReadyMembership and applying filters to the grid listings, but this allows you to surface all of this key information into a single dashboard, saving you huge amounts of time.

With this widget you could for example view

- All orders which are overdue on payment
- All members who have joined within the last 24hrs
- All membership subscriptions which are due to expire in the next 2-days
- All attendees to events in the next 2 weeks who haven't yet specified their dietary requirements

This is an example of it in use to display invoices raised



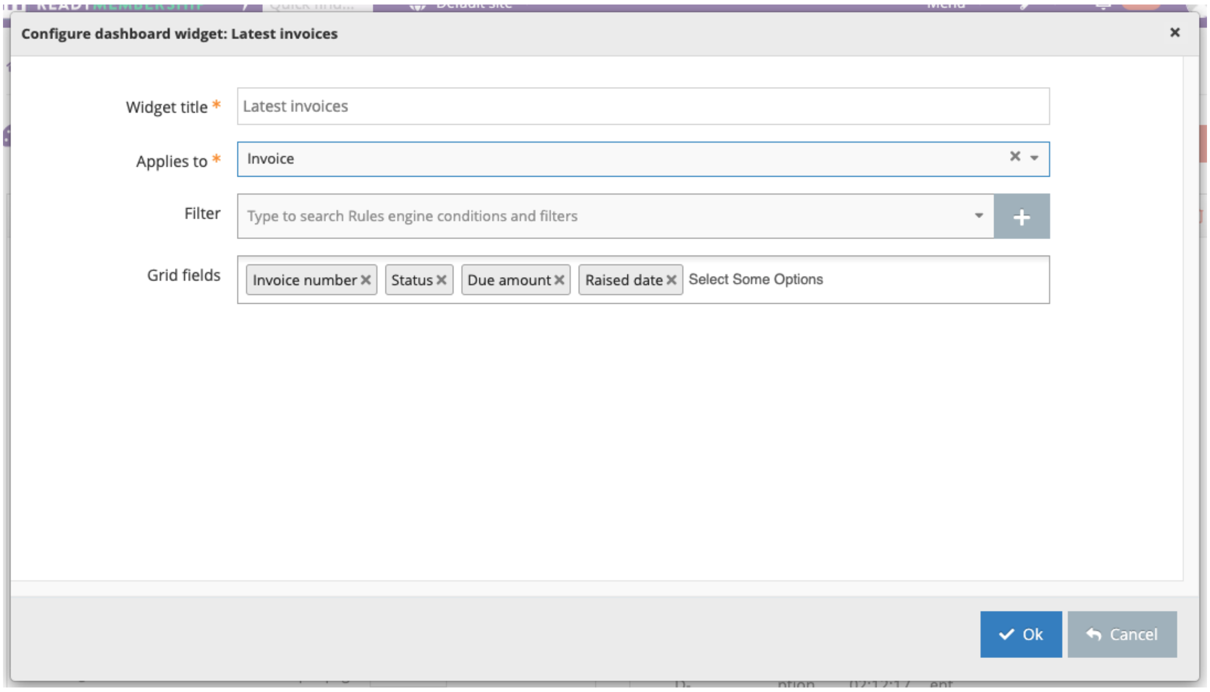
Latest invoices

#	Status	Due amount	Raised date
RM-02832	Fully paid	0.00	20 Dec 2021
RM-02831	Fully paid	0.00	20 Dec 2021
RM-02830	Raised	498.00	20 Dec 2021
RM-02829	Raised	120.00	20 Dec 2021
RM-02828	Raised	5.00	20 Dec 2021

Showing 1 to 5 of 2,774 records, results per page: 5

« 1 2 3 4 5 »

And this is the configuration required to display this



Displaying results

When the widget is displayed, it will show a grid of the results. You can then change the page size and navigate to view the next results, any changes you make here though will not be saved, only configuration information is saved.

Next to each row you should see an eye icon, clicking on this will go to the detail page for this particular record.

Configuring Filter Results

There are four fields that configure what is displayed by the widget:

- **Widget title** - the standard title field shown on all widgets - this is displayed in the header of the widget
- **Applies to** - this is a list of data objects in ReadyMembership. Some of them will be pretty self explanatory, but others a lot more obscure, and we'll cover these in a bit more detail later. The key thing to note here is that the filter & grid fields that follow, as based on whatever object selection you make here.
- **Filter** - once you have selected an object in the **Applies to** field, then you'll see a list of filters which have been created by Admin users for that object. If you don't select a filter, you'll see all of the rows for that object. Selecting a filter will then reduce those rows to only those which meet that filters requirement

- **Grid fields** - Same as with the filter object, this allows you to pick fields for the object chosen in the **Applies to** field. The fields and the order you select are the ones which will be displayed in the widget. Be wary about selecting too many fields, so that the displaying of the data isn't squeezed.

What are the objects in the ***Applies to*** field …

The **Applies to** dropdown field will display numerous objects to select from, most of them won't be particularly useful on a regular basis, and some will depend on which features you have installed and the customisations made for you.

These are the most common and useful objects to choose from

- **Announcement** - a list of announcements created for the front-end of the website (*if you have the feature installed*)
- **Asset** - Assets uploaded to the asset manager (only a few fields are available however)
- **Activity** - CRM activity e.g. whether a user has logged in, or opened an email etc
- **Contact** - CRM contacts - only basic name and email address fields are available
- **Marketing list** - CRM marketing lists - name of the list and the number of subscribed contacts can be displayed
- **Note** - CRM notes - details of who the note was added to and what the note was can be displayed
- **Organisation** - CRM organisation - only the organisation name, date added and status can be displayed
- **Subscription** - Status and dates of a members subscription and who it belongs to
- **Event** - Title, date, type of the event created in eventfolio
- **Failed payment** - payments which have failed
- **Order** - details of orders created on the system - includes who it was raised by and amount for/owed
- **Invoice** - details of orders created on the system - includes who it was raised by and amount for/owed
- **Payment** - payments recognised by the system - includes details of amount and when payment was made but not of who it was made by
- **Submission entry** - who and when the submission was made by (*if you have the feature installed*)
- **Abstract** - Abstract submissions made - includes details on what but not by who (*if you have the feature installed*)
- **Event submission** - submissions for an event which includes the title, who by and status (*if you have the feature installed*)
- **Grant application** - submissions made for Grants which includes the status, who by and amount requested (*if you have the feature installed*)
- **Website user** - users who can login to the website

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