

# **RESOLVER**

## **DASHBOARD USER'S GUIDE**

April 2016

Dashboard by Resolver Inc.™

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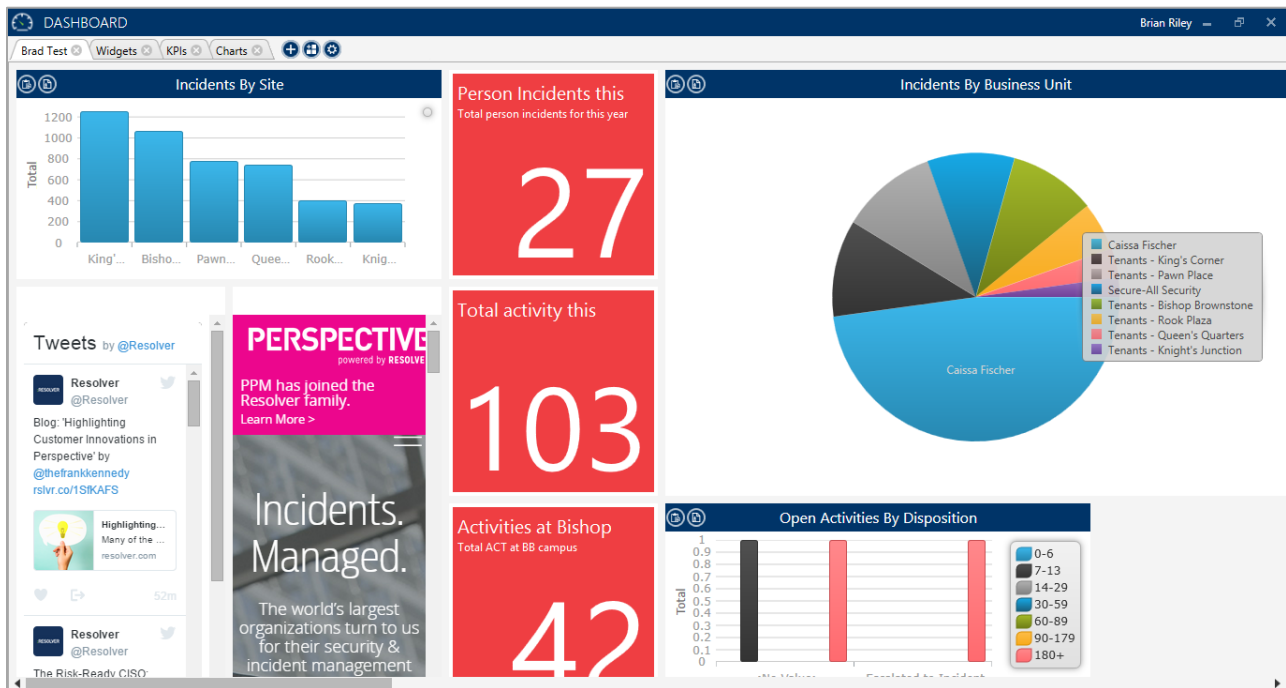
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# Dashboard Overview

Dashboard is an application designed to give you quick and easy access to important information about your organization's activities and incidents while you work within Perspective, its components, or other applications.

Dashboard features the ability to create an unlimited number of personalized dashboards where you can add widgets that can be configured and added as many times as needed, including the **Charting**, **KPI**, and **Web** widgets.



The **Dashboard** showing the **KPI**, **Charting**, and **Web** widgets.




# Before You Begin

## Who Should Use This Guide

This guide is for users operating Dashboard. For more information on using the built-in dashboard within Perspective, see the [Perspective User's Guide](#).

## Notes, Tips & Warnings

Throughout this guide, you'll see the following symbols:

	Indicates a <b>NOTE</b> .
	Indicates a <b>TIP</b> .
	Indicates a <b>WARNING</b> .

## Logging In

Users with a Perspective account will be able to log into Dashboard. Your Perspective administrator can provide you with the **Perspective Services** URL, your username and password, as well as any **Database** and **Business ID** information.



If your administrator selected the **Changed Password On Login** feature on your Perspective profile, before logging into Dashboard, you must first log into Perspective using the login credentials provided by your administrator then change your password. You will then be able to log into Dashboard using your username and updated password.



The **Perspective** launch screen.


## To log into Dashboard:

1. Ensure Compatibility View is turned off in **Internet Explorer**:
  - a. Click the gear icon in the top right of the browser.
  - b. Click **Compatibility View Settings**.
  - c. Ensure the **Display intranet sites in Compatibility View** checkbox is unchecked.
  - d. Click **Close**.
2. Use **Internet Explorer** to navigate to the **Perspective Services** URL.

**For On Premise customers:** <https://<servername>/PerspectiveServices>  
<servername> refers to the web server installed during the Perspective installation.

**For Hosted customers:** <https://<businessID>.myincidents.com/Perspective>

3. Click the **Dashboard** icon.



**PERSPECTIVE:**  
**DASHBOARD**

5.0

User Name

Password


Remember Me

Login Cancel

Settings

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The **Dashboard** login screen.

4. If launching Dashboard for the first time:
  - a. Click **Run** in the **Security Warning** window.
  - b. Click  **Settings**.
    - **For On Premise customers:**
      - i. Click **Specify Server**.
      - ii. If needed, enter the Perspective Services URL (e.g. `<servername>/IntegrationServices`) in the **Service Folder** field.
      - iii. If your business ID is different from **default**, enter it in the **Business ID** field.

**PERSPECTIVE**  
DASHBOARD

5.0

Back

MyIncidents.com Specify Server

Service Folder

example/integrationservices



Please Enter your Business ID

default


Please Select a database...

MAINDB

The **Specify Server** section of the login screen for **On Premise** customers.

- iv. Select the ID from the **Database Name** dropdown menu.
  - v. Click  **Back** to return to the previous screen.
- **For Hosted customers:**
    - i. Click **MyIncidents.com** if it's not already open (it should open automatically after clicking  **Settings**).
    - ii. Confirm the database selected in the **Database Name** dropdown is correct.





The screenshot shows the login interface for the Perspective Dashboard. At the top left is the logo 'PERSPECTIVE DASHBOARD' with the version '5.0' below it. On the top right is a 'Back' button with a left-pointing arrow. Below the logo is a horizontal tab bar with two tabs: 'MyIncidents.com' (which is active and highlighted in grey) and 'Specify Server'. Underneath the tabs is a dark blue section with the text 'Please Select a database...' and a dropdown menu showing 'MAINDB' as the selected option.

The **MyIncidents.com** section of the login screen for **Hosted** customers.

- iii. Click  **Back** to return to the previous screen.




If the **Database Name** field is missing or login fails, click the **Specify Server** tab to confirm the **Service URL**, **Business ID**, and **Database** fields have populated correctly.


5. Enter your user name and password in the **User Name** and **Password** fields.



Windows Authentication is **not** supported.

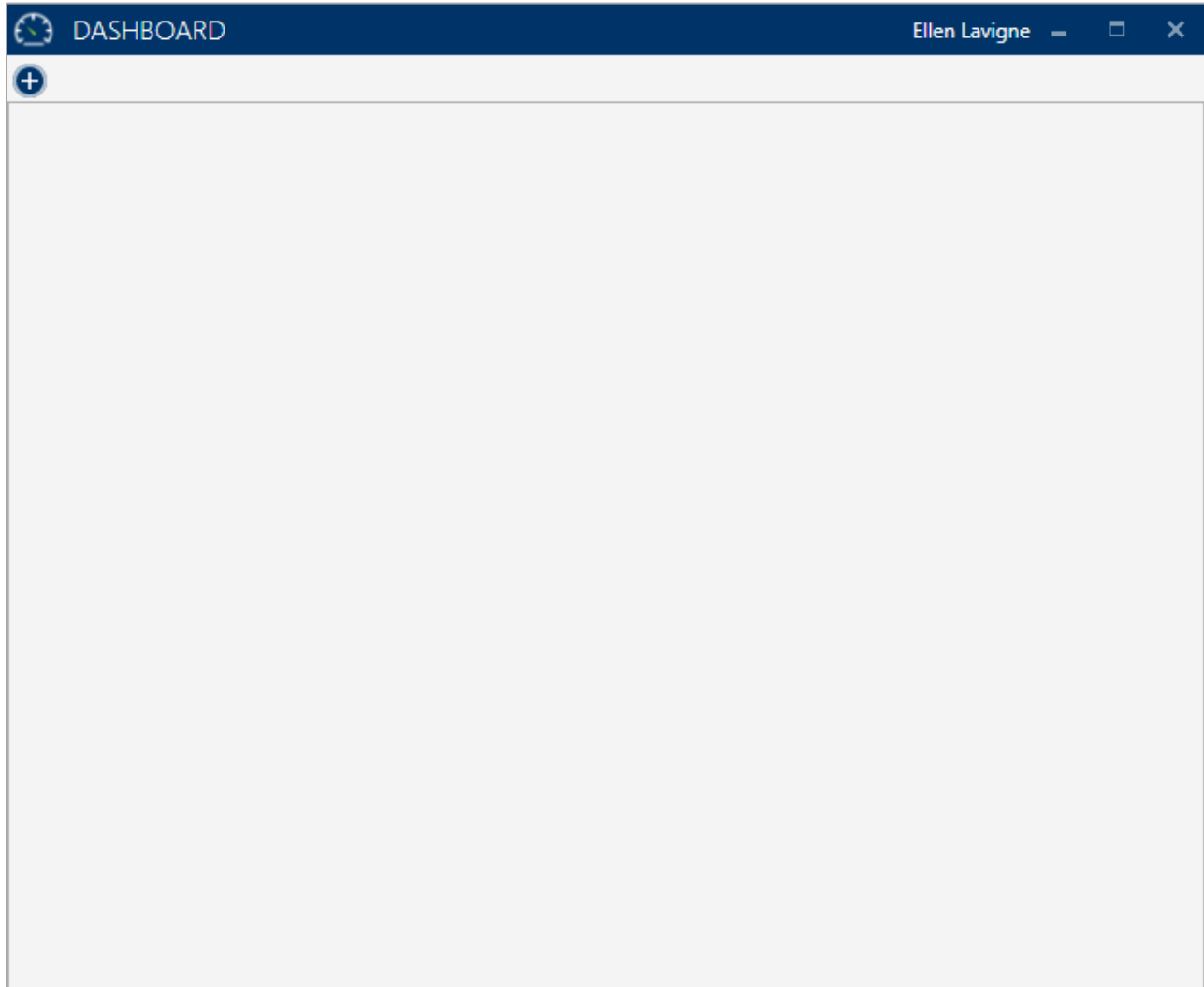
6. Click the  icon under **Remember Me** if you want Dashboard to remember your user name.
7. Click **Login**.

## Logging Out

To close and log out of Dashboard, click the  icon in the top right of the window.

# Dashboards


After successfully **logging in**, you'll be taken to a blank dashboard, which is an unsaved dashboard without widgets. It's from here that you can create one or more dashboards and add your **widgets**.

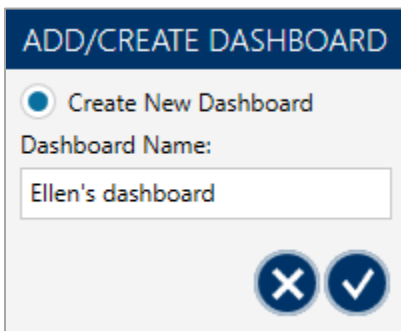


*A blank dashboard.*


## Create a New Dashboard

### To create a new dashboard:


1. Click the  icon to open the **Add/Create Dashboard** window.
2. Click the radio button next to **Create New Dashboard**. If this is the first dashboard you've created, this button will be selected by default and no other options will be available.
3. Enter a name for your new dashboard in the **Dashboard Name** field.



The **Add/Create Dashboard** screen.

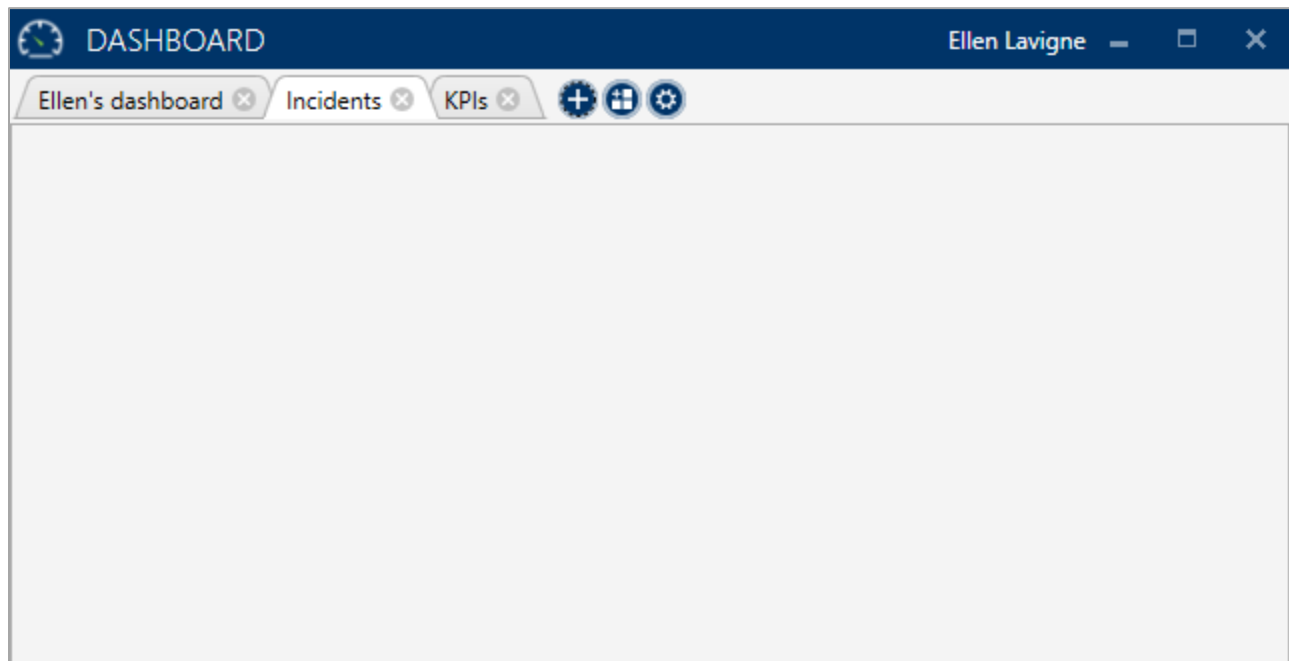
4. Click the  icon to save.
5. Repeat steps 1-3 to create more dashboards as needed.

## Open an Existing Dashboard

When multiple dashboards are open, they'll appear as tabs. You can close these dashboards by clicking the  icon within the tabs.




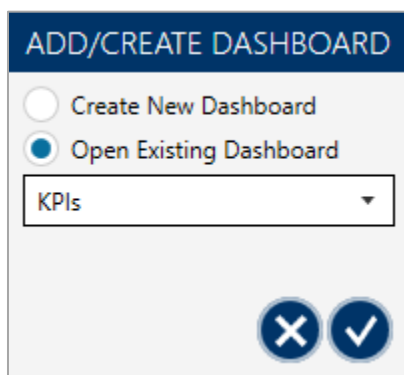
Clicking the  icon in a tab does **not** delete an existing dashboard. To delete a dashboard, see [Delete a Dashboard](#).



The home screen with multiple tabs open.

### To open an existing dashboard:

1. Click the  icon.
2. Click **Open Existing Dashboard**. If you haven't created any other dashboards, this option will be hidden.
3. Select the existing dashboard you want to view from the dropdown menu.





The **Open Existing Dashboard** option selected in the **Add/Create Dashboard** window.

4. Click the  icon to open.


## Rename a Dashboard

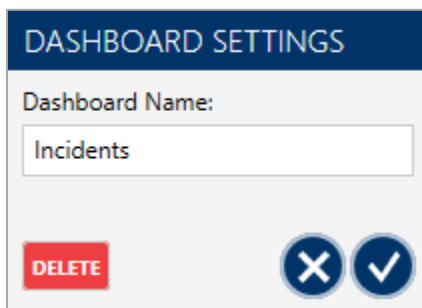
### To rename a dashboard:

1. Click a dashboard tab to open it.
2. Click the  icon to open **Dashboard Settings**.
3. Enter a new name for the dashboard in the **Dashboard Name** field.
4. Click the  icon to save and close.


## Delete a Dashboard

### To delete a dashboard:

1. Click a dashboard tab to open it.
2. Click the  icon to open **Dashboard Settings**.



*The **Dashboard Settings**.*

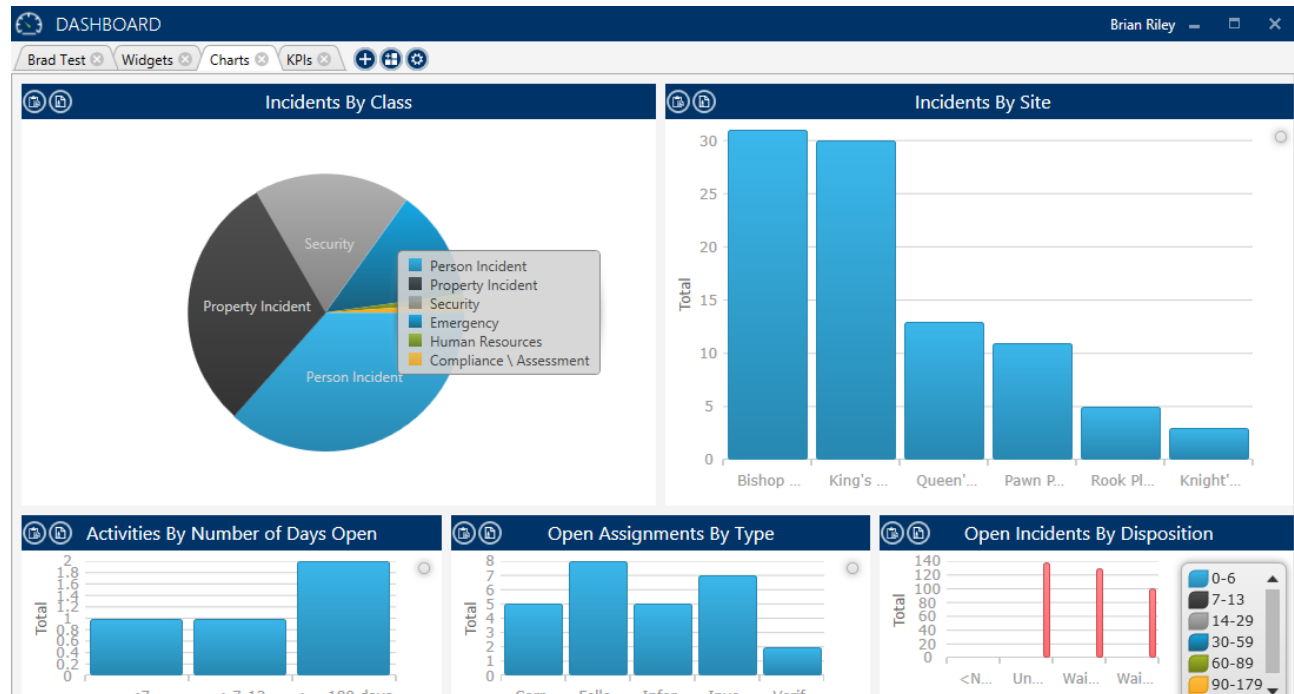
3. Click **Delete**.
4. Click the  icon to confirm.



Deleting a dashboard will also permanently delete the widgets on that dashboard.

# Charting Widget



The Charting widget gives you an overview of the incident, activity, and case trends and statistics within your organization via bar or pie charts. These charts are clickable so you can drill down into more specific data as well as share this data with others by copying or saving a chart.

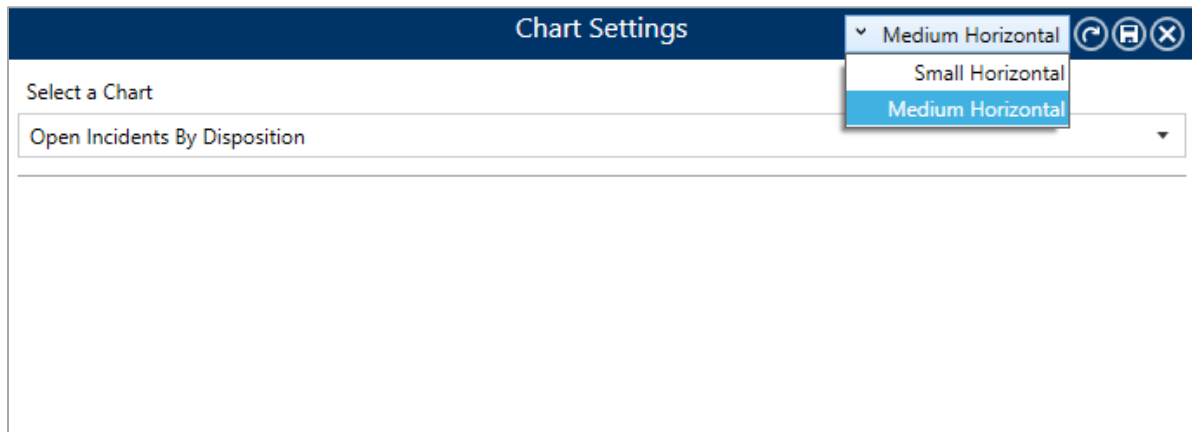


A dashboard displaying multiple charts.


## Add the Charting Widget

### To add the Charting widget:

1. Click the  icon to open the **Add Widgets** window.
2. Click **Perspective Charting**.
3. Click the  icon.
4. Hover your cursor over **Charts Settings** to show the widget toolbar.
5. Select either **Small Horizontal** or **Medium Horizontal** from the dropdown menu to adjust the size of the widget.




Selecting a widget size in the **Chart Settings**.

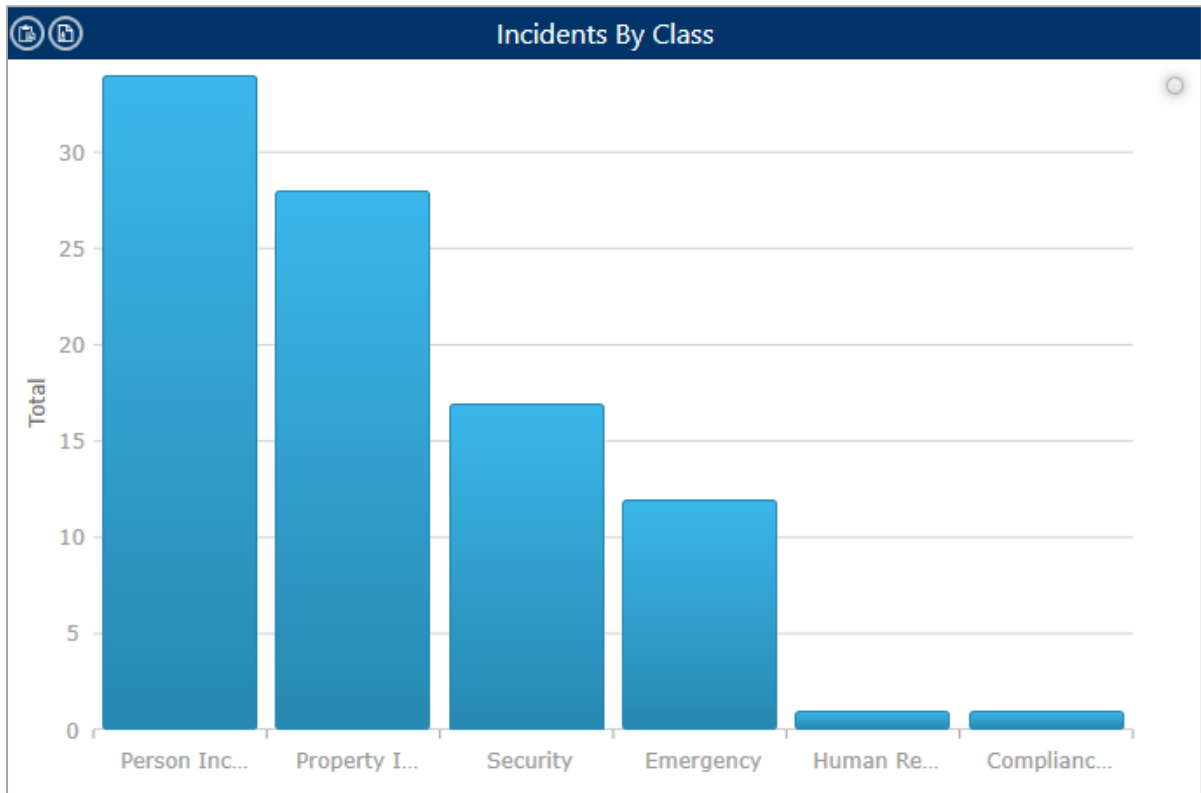
6. Select a chart type (e.g. Activities By Month, Open Cases By Disposition, Loss By Month, etc.) from the **Select a Chart** dropdown menu.
7. Add any additional chart criteria. Depending on the chart selected in step 6, the criteria may include:
  - **Case Category:** Filter chart results to show either internal or external cases.
  - **Choose Call Category:** Restrict your data to a specific Call Category, adding additional criteria as needed.
  - **Choose Class:** Restrict your data to a specific Class, adding additional criteria as needed (e.g. **Class > Category > Subcategory > Type**).
  - **Choose Site:** Restrict your data to a specific Site, adding additional criteria as needed (e.g. **Site > Building > Location > Section**).
  - **From Last:** Select the time period for the chart data (e.g. 14 days).
  - **Pie Chart or Bar Chart:** Choose either a pie chart or a bar chart.
  - **Top:** Specify the number of categories you want to display on your chart (e.g., top 10 classes).
  - **Year:** Select the year for your chart data (e.g., 2014).
8. Hover your cursor over **Chart Settings** to show the widget toolbar.
9. Click the  icon to show the chart.




- Depending on the chart selected, you may be able to reveal more specific information by clicking areas within the chart.

For example, if you opened the **Incidents By Class** bar chart, clicking on the **Property Incident** bar in the chart will present another chart with data for Theft, Vandalism, Threats, and Arson. If you clicked the Theft bar, it would display another chart that summarized how many theft-related incidents involved Unlawful Entry, Attempted Forcible, Entry, etc.


Click the  icon to return to the previous chart.



*The Incidents By Class bar chart.*



- To return to **Chart Settings**, hover your cursor over the chart to reveal the widget toolbar, then click the  icon.



To edit the **Charting** widget, hover your cursor over the widget to reveal the widget toolbar, then click the  icon to return to the settings.


## Save or Copy a Chart

### To save or copy a chart:


1. **Open a chart.**
2. To save the chart as a JPEG file on your computer, click the  icon.
3. To copy the chart to your clipboard, click the  icon.

## Close the Charting Widget

### To close the charting widget:

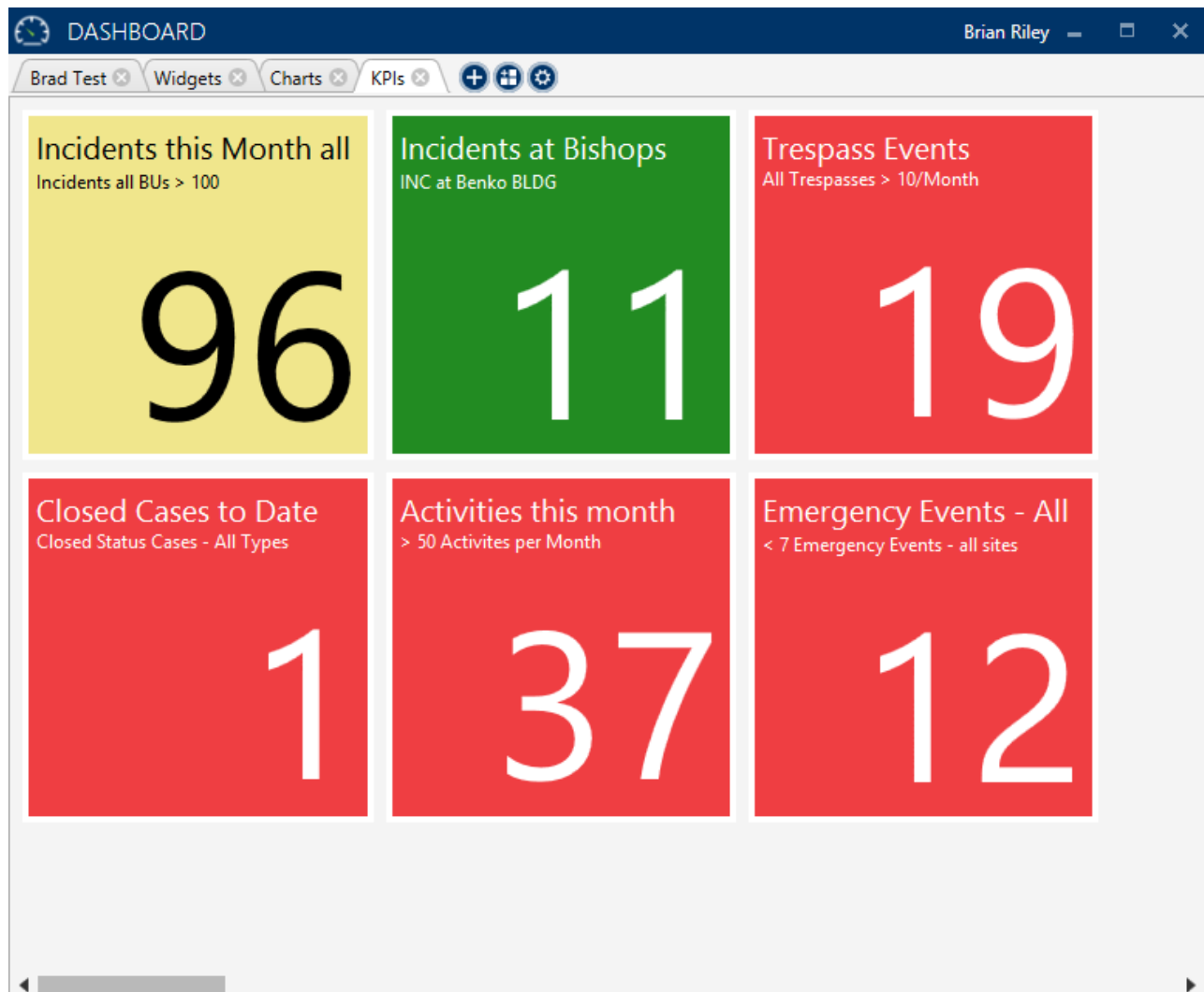
1. Hover your mouse over **Chart Settings** to show the widget toolbar.
2. Click the  icon to delete and close the chart.



Clicking the  icon will close and delete the chart and its data.

# KPI Widget




KPI stands for **key performance indicator**, which is a system that measures how effectively your organization is reaching its objectives through quantifiable metrics. The **KPI** widget allows you to compare the number of incidents, activities, or cases from within your organization and compare those figures to a target (or base number).



A dashboard displaying multiple KPI widgets.

## Add the KPI Widget

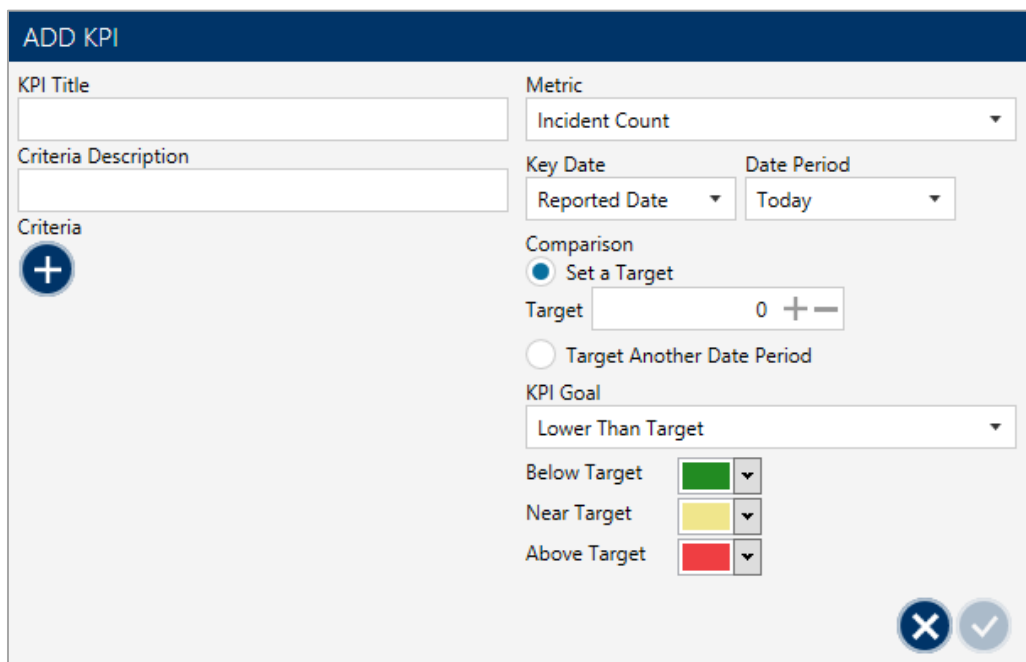
### To add a KPI widget to your dashboard:

1. Click the  icon to open the **Add Widgets** window.
2. Click **Perspective KPIs**.
3. Click the  icon.
4. Click the  icon in the blank KPI widget to open the **Add KPI** window.




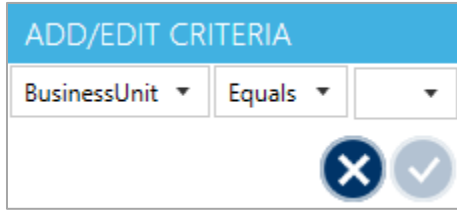
*A blank KPI widget.*

5. Enter the name of your KPI in the **KPI Title** field.




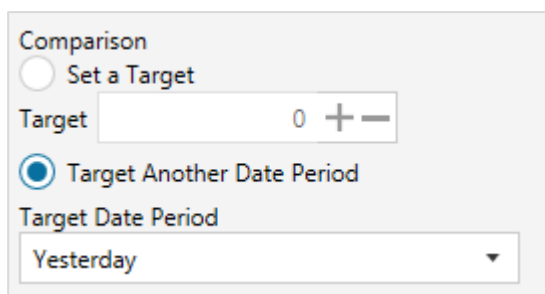
*The **Add KPI** window.*

6. Click the  icon under **Criteria** to open the **Add/Edit Criteria** window.



The **Add/Edit Criteria** window.

7. Select a category from the first dropdown menu (e.g. ClassRollup, Record Owner, Disposition, etc.).
8. To include this criterion in the KPI data, select **Equals** from the second dropdown menu. To exclude this criterion, select **NotEquals**.
9. In the third dropdown menu, select a subcategory. Continue selecting subcategories as needed.
10. Click the  icon to save the criteria.
11. Repeat steps 6-10 add more criteria as needed.
12. Enter a brief description of the KPI criteria in the **Criteria Description** field.
13. Select either **Activity Count**, **Case Count**, or **Incident Count** from the **Metric** dropdown menu.
14. Select the appropriate dates in the **Key Date** and **Date Period** dropdown menus.
15. Under **Comparison**, select a target.
  - If you choose **Set a Target**, enter a numerical value.
  - If you choose **Target Another Date Period**, select a date period. The options in this dropdown menu will vary depending on your selection in the **Date Period** dropdown menu.



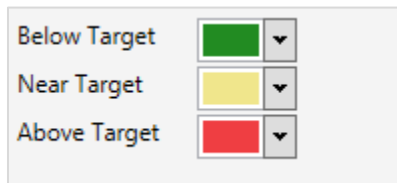
The **Comparison** section.

16. Select either **Lower Than Target** or **Higher Than Target** from the **KPI Goal** dropdown menu.




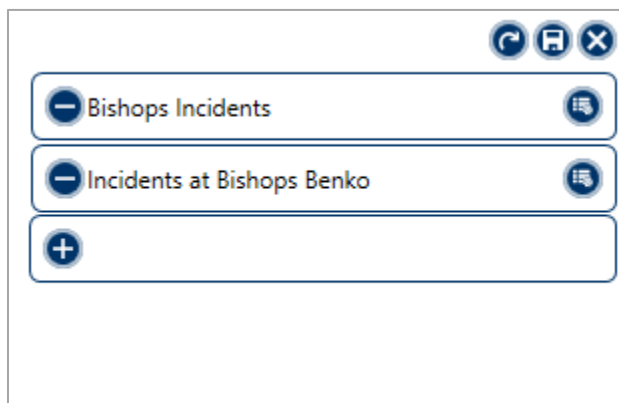
The **Higher Than Target** option would be selected when surpassing a target has a positive outcome (e.g. exceeding your organization's goal for the number of closed cases for the year).

17. **OPTIONAL:** Select colors for **Below Target**, **Near Target**, or **Above Target** by clicking the color dropdown menus. From these dropdown menus, you can select a standard color or create a custom color by clicking **Advanced**.



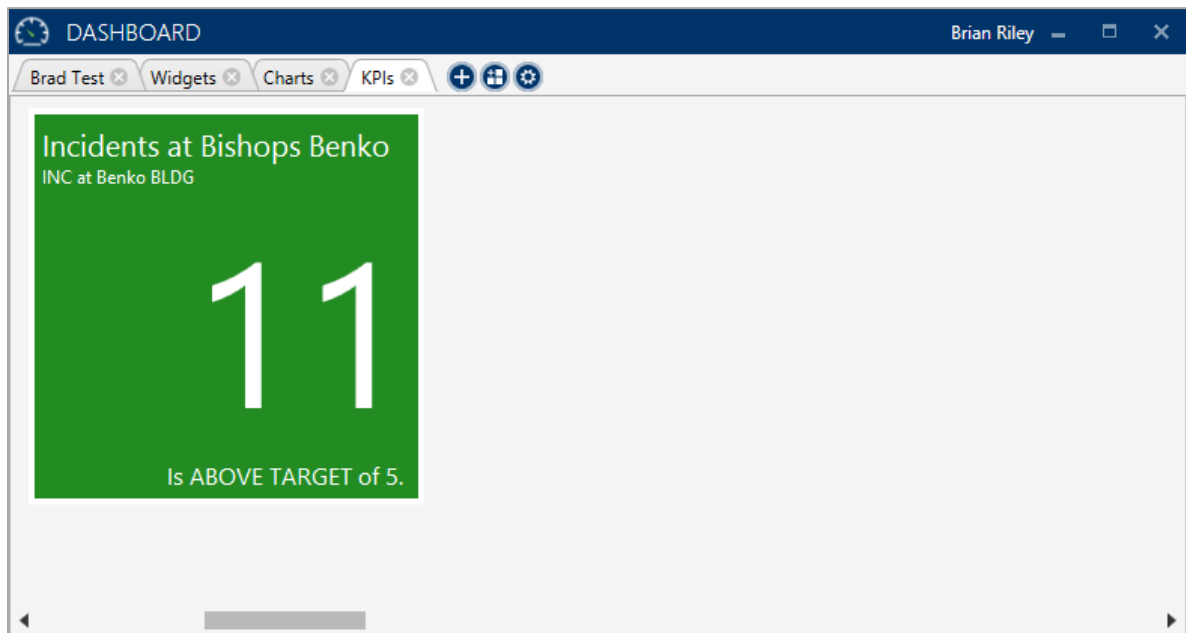
Select custom colors for the KPI by clicking the color dropdown menus.

18. Click the  icon to save and return to the dashboard.
19. Repeat steps 4-18 to continue to add more KPIs, which will be displayed at regular intervals in the widget window.
20. Hover your cursor over the new KPI to show the widget toolbar.




A KPI on the dashboard showing the widget toolbar.

21. Click the  icon to view the KPI.






*The new KPI displaying data on the dashboard.*

22. To return to **KPI Settings**, hover your cursor over the KPI to reveal the widget toolbar, then click the  icon.

## Edit a KPI



### To edit a KPI:

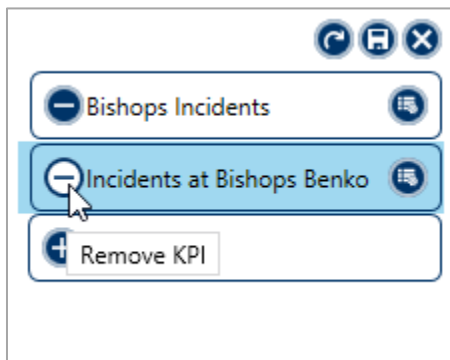
1. Hover your cursor over the KPI to reveal the widget toolbar.
2. Click the  icon.
3. Click the  icon next to the KPI you want to edit.
4. Make any required changes in the **Add KPI** window.
5. Click the  icon to save and return to the dashboard.

## Delete a KPI from the Widget

You can remove individual KPIs without deleting the widget from your dashboard. For more information on removing the KPI widget from your dashboard, see [Close the KPI Widget](#).

### To delete a KPI from the widget:

1. Hover your cursor over the KPI to reveal the widget toolbar.
2. Click the  icon.
3. Click the  icon next to the KPI you wish to delete.




*Removing a KPI from the widget.*

4. Click  to confirm.

## Close the KPI Widget

### To delete and close the KPI widget:

1. Hover your cursor over the KPI to reveal the widget toolbar.
2. Click the  icon to close.

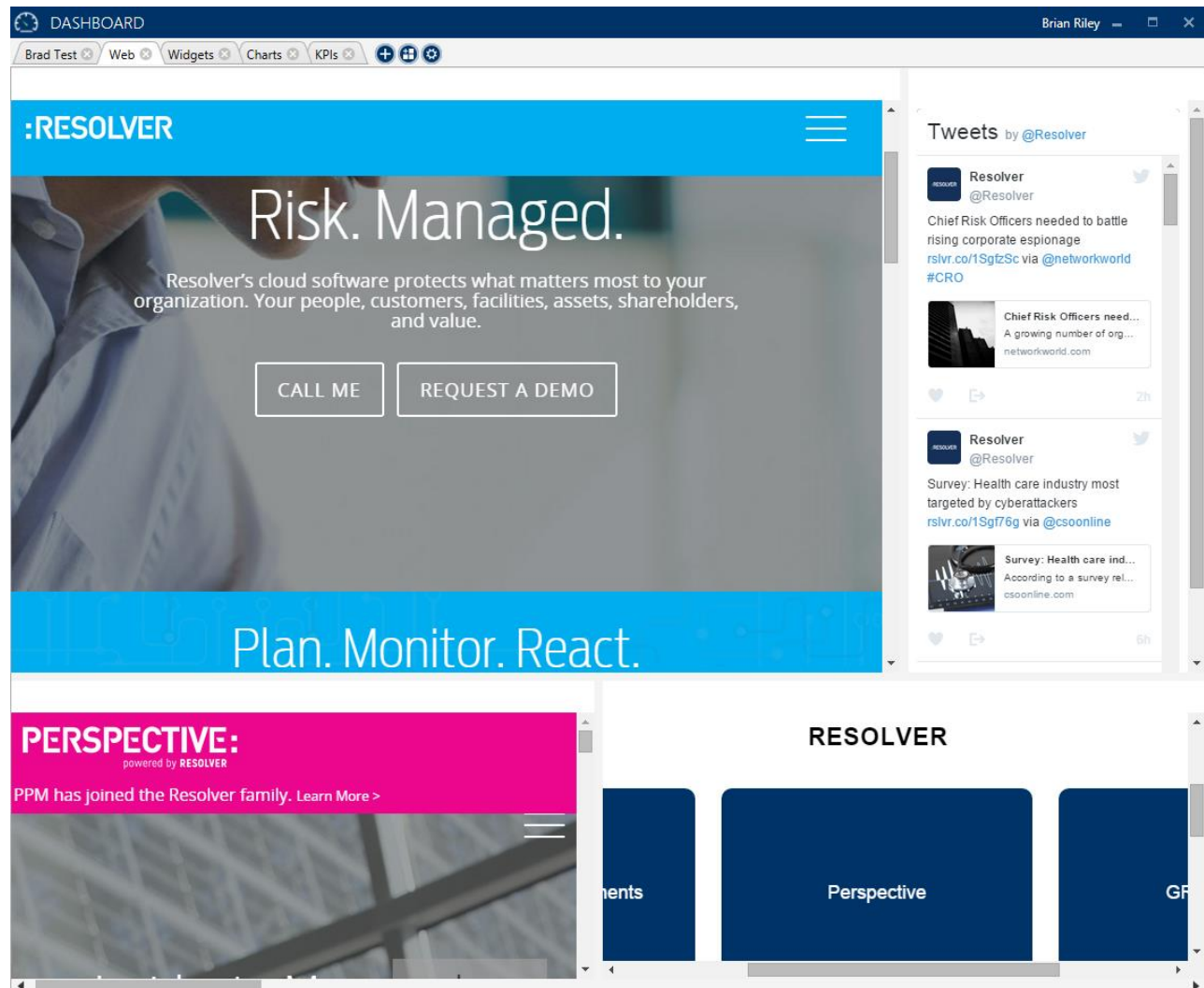


Clicking the  icon will close and delete the chart and its data.



# Web Widget


Through the Web widget, you can display external web pages and embedded content directly on your dashboards.




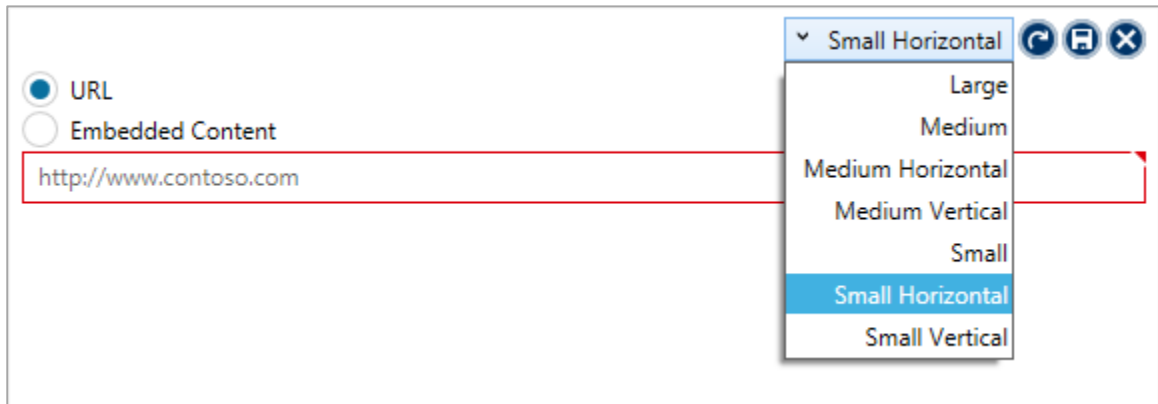
*A dashboard displaying multiple web widgets.*

## Add the Web Widget



**To add a Web Widget to your dashboard:**

1. Click the  icon to open the **Add Widgets** window.
2. Click **Web Widget**.


3. Click the  icon.
4. Hover your cursor over the widget to show the widget toolbar.
5. Select a size from the dropdown menu to adjust the size of the window.



The dropdown menu showing sizing options in the **Web Widget** settings.


6. Select either the **URL** or **Embedded Content** radio buttons:
  - If you select **URL**, enter a valid website address in the text box. The address entered here does **not** need to begin with http:// (e.g. **exampleaddress.com** would be acceptable as long as it's a valid URL).
  - If you select **Embedded Content**, provide valid HTML code. The embedded content feature is designed to display content from sites like YouTube and Twitter.
7. Click the  icon to display the web page or embedded content.
8. Click the  icon to return to **Web Settings**.




To edit the **Web Widget**, hover your cursor over the widget to reveal the widget toolbar, then click the  icon to return to the settings.

## Close the Web Widget

### To delete and close the Web Widget:

1. Hover your cursor over the Web Widget to reveal the widget toolbar.
2. Click the  icon to close.



Clicking the  icon will close and delete the **Web Widget** and its data.

# Resize & Arrange the Widgets



## Resize the Widgets

The **Web Widget** and **Charting** widget can be resized by hovering your cursor over the widget to reveal the widget toolbar, then selecting a size from the dropdown menu.

The **KPI** widget cannot be resized.

## Rearrange Widgets

**To rearrange the widgets on a dashboard:**

1. Hover your cursor near the top of the widget to reveal the  icon.
2. With the  icon still on the screen, click and drag the widget to a new location on the dashboard then release.

## Glossary

<i>TERM</i>	<i>DEFINITION</i>
<b>Activity</b>	An event or series of events with which security personnel may become involved. In Perspective, activities are created, scheduled, and assigned to officers or organizations.
<b>Case</b>	A grouping of incidents related by person, item, location, class or other common trait that generally requires further investigation.
<b>Dashboard</b>	An application designed to be used with Perspective that provides you with important information about the activities, incidents, and cases within your organization via widgets. The term "dashboard" can also refer to individual screens saved within Perspective Dashboard application that contain one or more configured widgets.
<b>Incident</b>	An unusual action or situation affecting persons or property, either accidental or purposeful, which requires notice or follow-up by a security or human resources department.
<b>KPI</b>	KPI stands for <b>key performance indicator</b> , which is a system that measures how effectively your organization is reaching its objectives through quantifiable metrics. The KPI widget allows you to compare the number of incidents, activities, or cases from within your organization and compare those figures to a target (or base number).
<b>Widget</b>	A tool that helps you perform additional functions within an application. The widgets within Dashboard allow you to use charts, KPIs, and the web to analyze important data from your organization.

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# Contact Information

## Technical Support

**Toll Free:** 1-877-776-2995  
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**Email:** [support@resolver.com](mailto:support@resolver.com)  
**Website:** <https://support.resolver.com>

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**Website:** <http://www.resolver.com>