:RESOLVER

DASHBOARD USER'S GUIDE

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Dashboard by Resolver Inc.™

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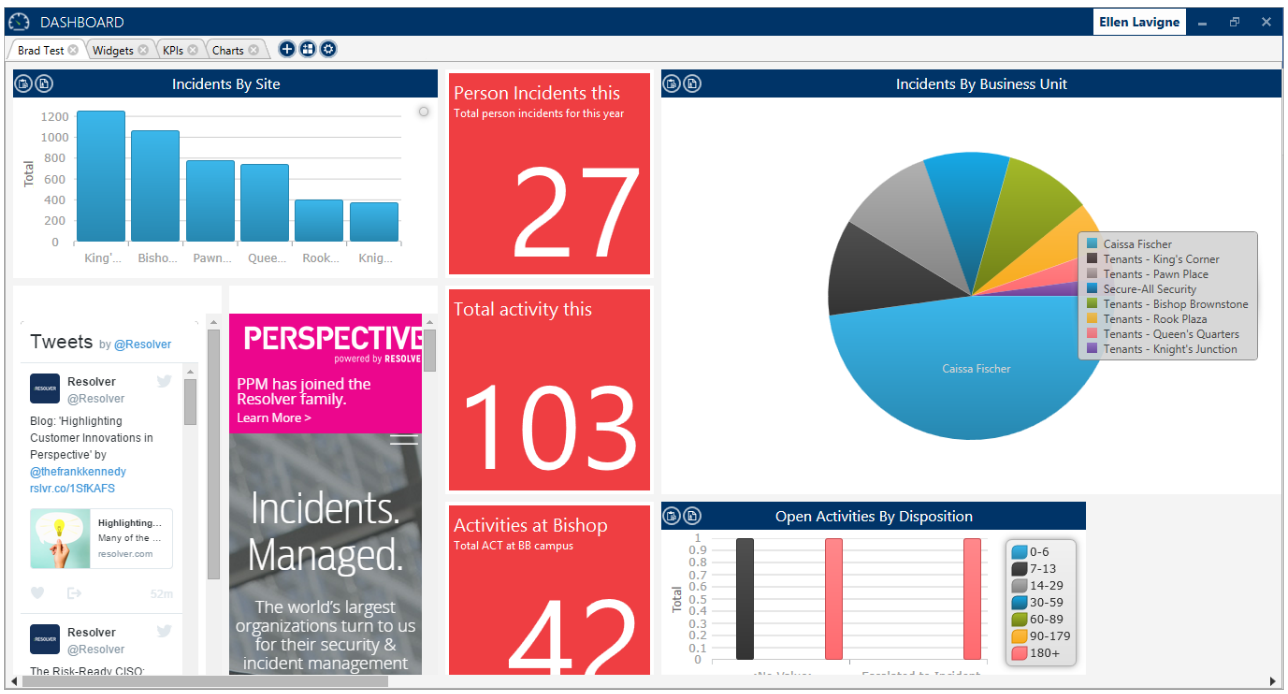
Dashboard Overview

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 **NOTE**.
	Indicates a **TIP**.
	Indicates a **WARNING**.

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 account, 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.

4. If launching Dashboard for the first time:

    a. Click **Run** in the **Security Warning** window.

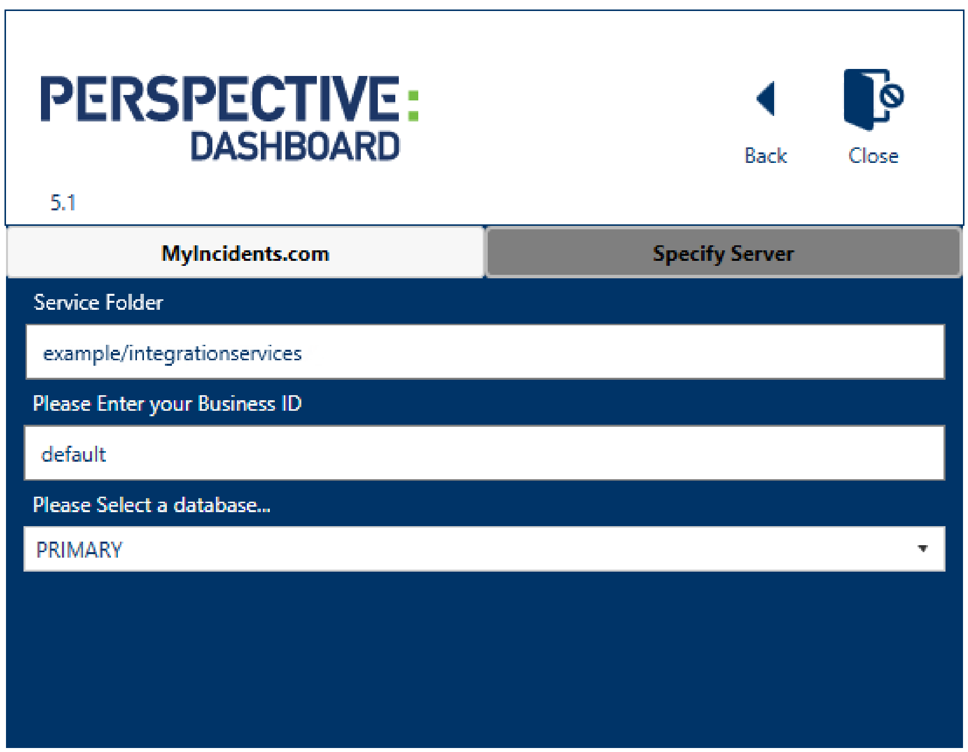
    b. Configure your login settings:

    - **For On Premise customers:**

        i. Click the **Specify Server** tab.

        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.



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

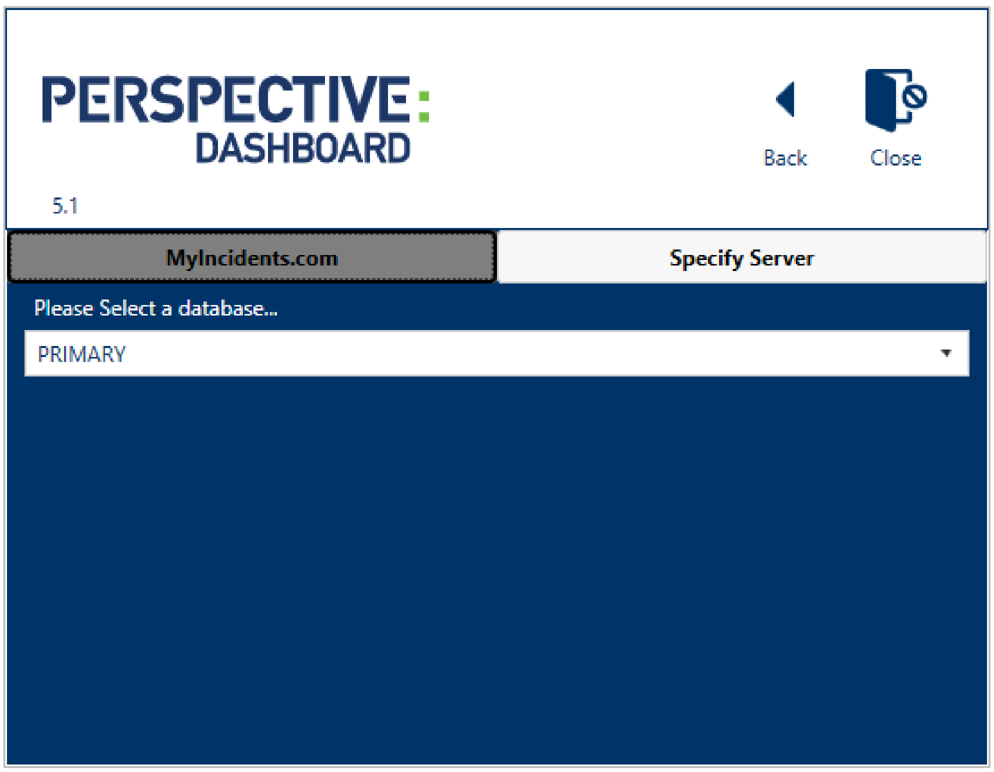
        iv. Select the database from the **Database Name** dropdown menu.

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

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

If the database 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 login credentials:

   a. If you're **not** logging in using single sign-on authentication (SSO):

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

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

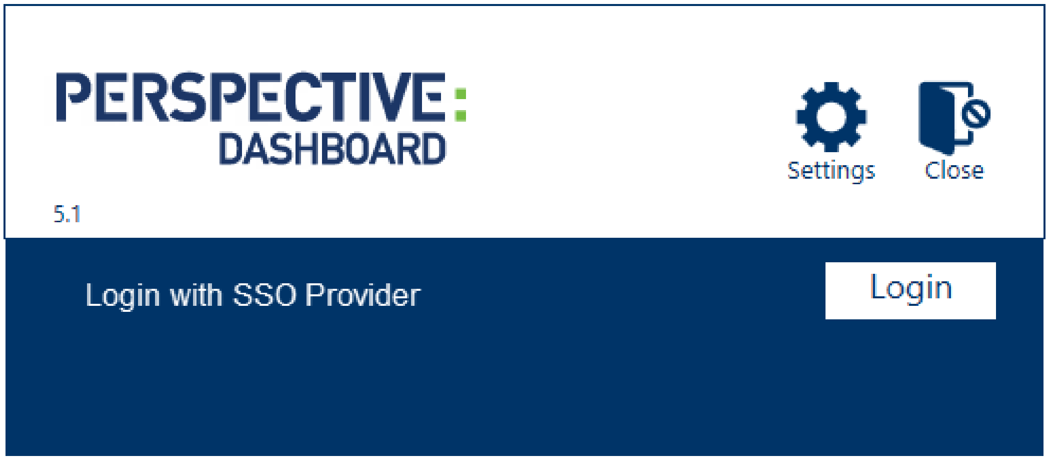
      iii. Click **Login**.

The login screen (SSO not enabled).

   b. If you're logging in using single sign-on (SSO) authentication:

      i. Click **Login**.

      ii. Enter your username, password, and any other information required by your SSO provider to complete the login process.



The SSO login screen.

If both SSO and Perspective authentication are enabled on your system and you want to log in using your Perspective credentials, click **Login with Perspective Username and Password**, then enter your user name and password. If this option isn't appearing on the login screen, your Perspective administrator hasn't enabled both Perspective and SSO authentication.

The SSO settings, including the amount of time your session remains active, are determined by the SSO provider selected by your Perspective administrator.

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

7. Click **Login**.

Logging Out

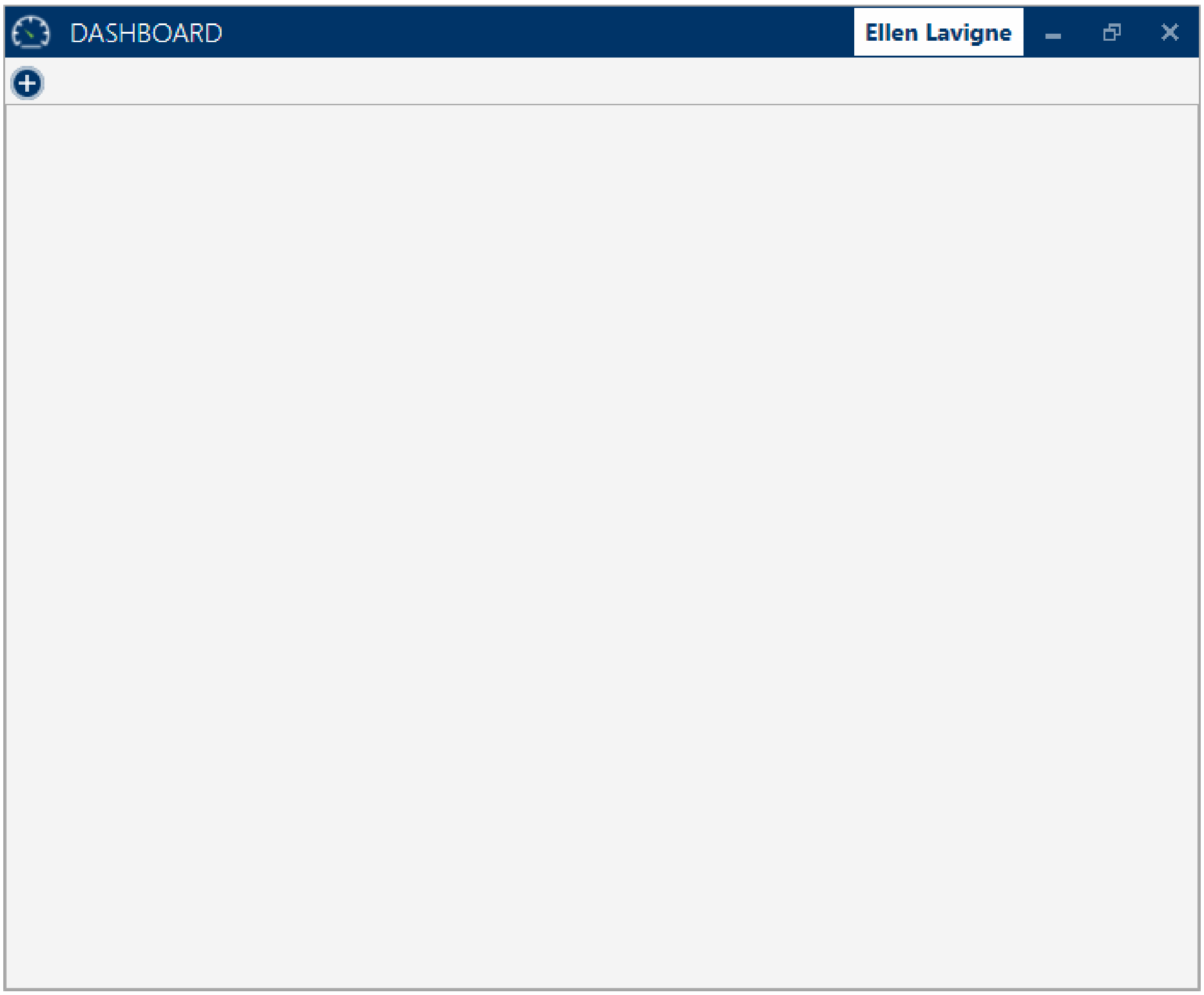
To log out of the Dashboard, click your user name in the top right corner, then click **Logout.**

*The **Logout** function at the top right corner of the home screen.*

If you've logged in using single sign-on (SSO) authentication, clicking the **X** at the top right of the screen will **not** log you out of Dashboard, Perspective, and/or Dispatch. To end your SSO session, click **Logout**.

Dashboards

After successfully logging in, you'll be taken to a blank dashboard, which is an unsaved dashboard that does not contain any widgets. It's from here that you can create one or more dashboards and add your widgets.



A blank dashboard.

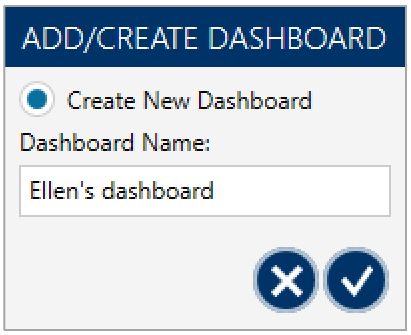
Create a New Dashboard

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.*

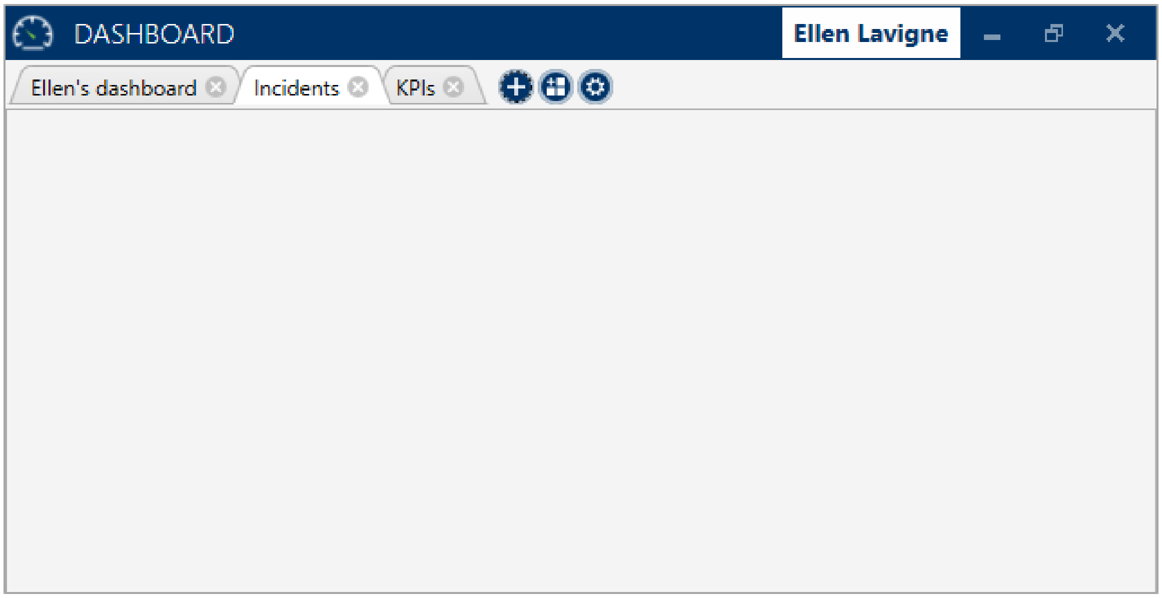
4. Click the icon to save.

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.

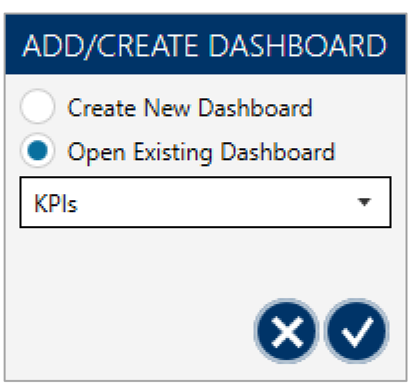
Clicking the icon in a tab does **not** delete an existing dashboard. To delete a dashboard, see Delete a Dashboard.



The home screen with multiple tabs.

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

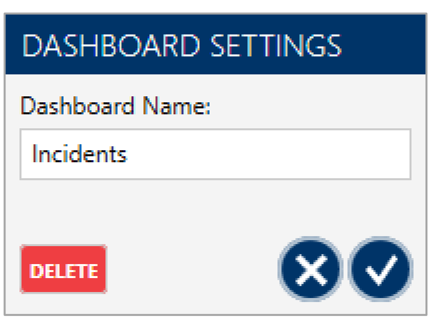
To rename a dashboard:

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.

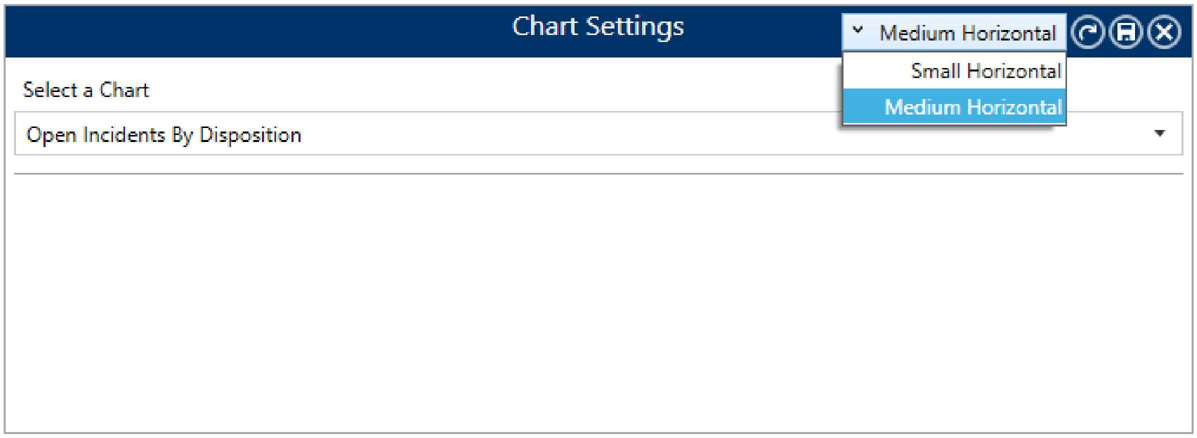
Add the Charting Widget

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.

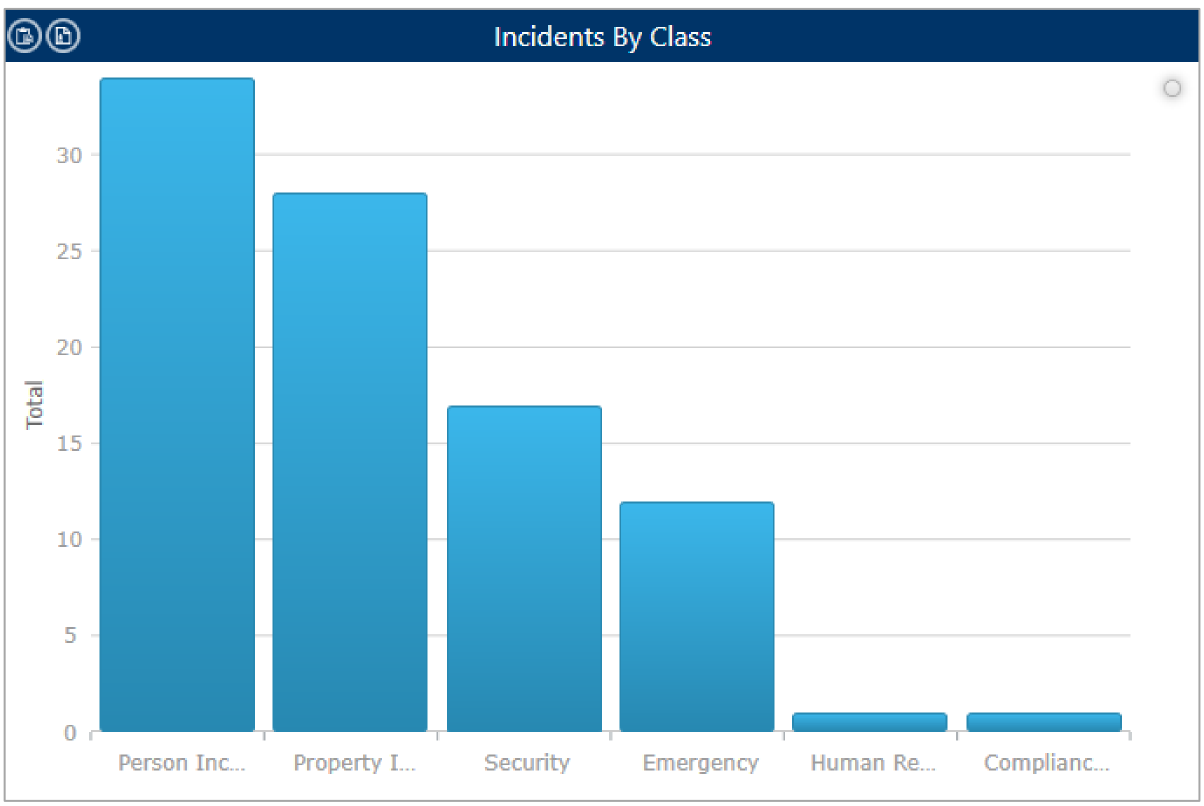
7. Add additional chart criteria. Depending on the chart selected in step 6, the criteria may include:

   - **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 display 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.

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

Save or Copy a Chart

To save or copy a chart:

1. Open a chart on your dashboard. If needed, hover your cursor over the chart to show the toolbar, then click the icon to show the 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

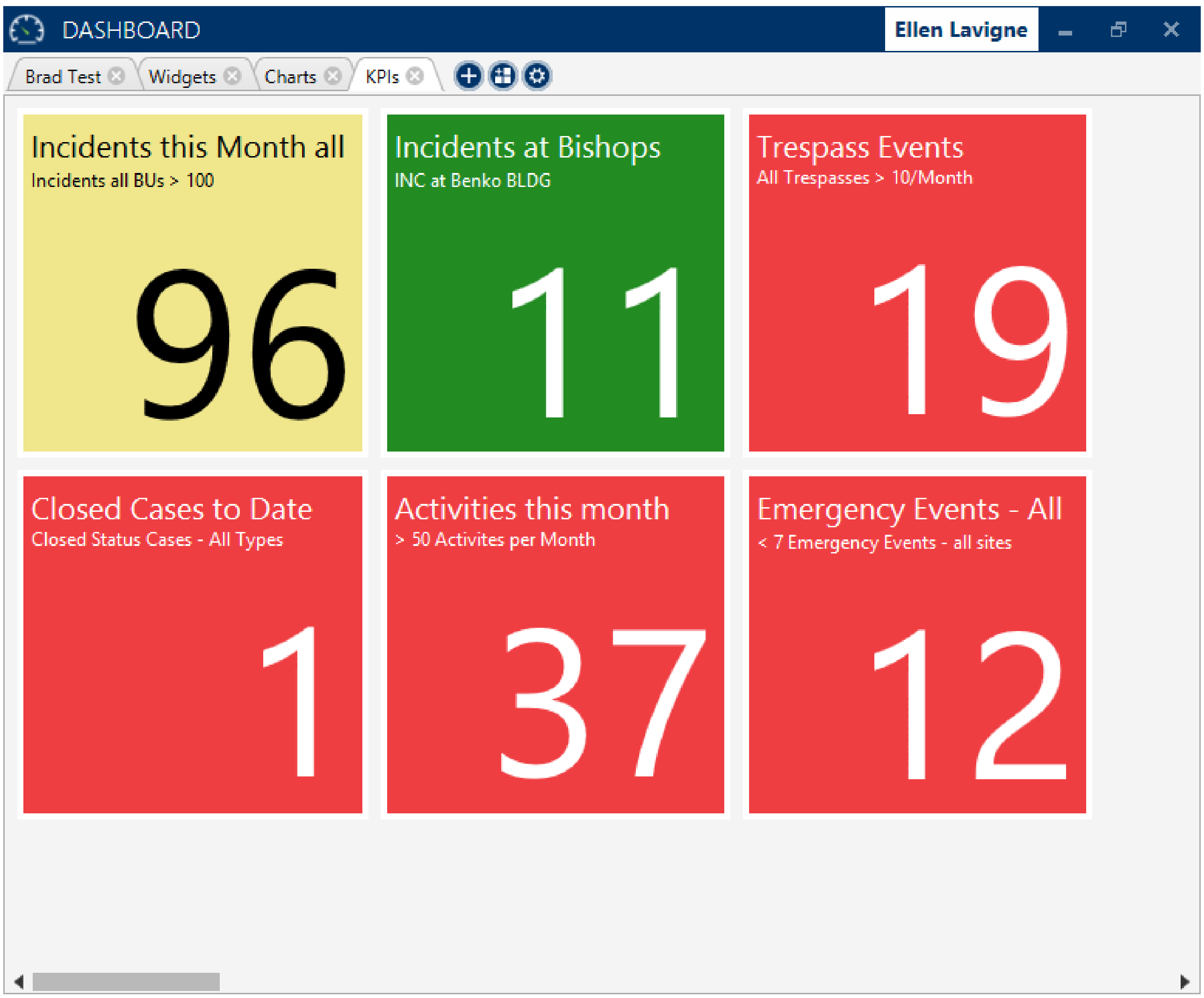
To close the charting widget:

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.

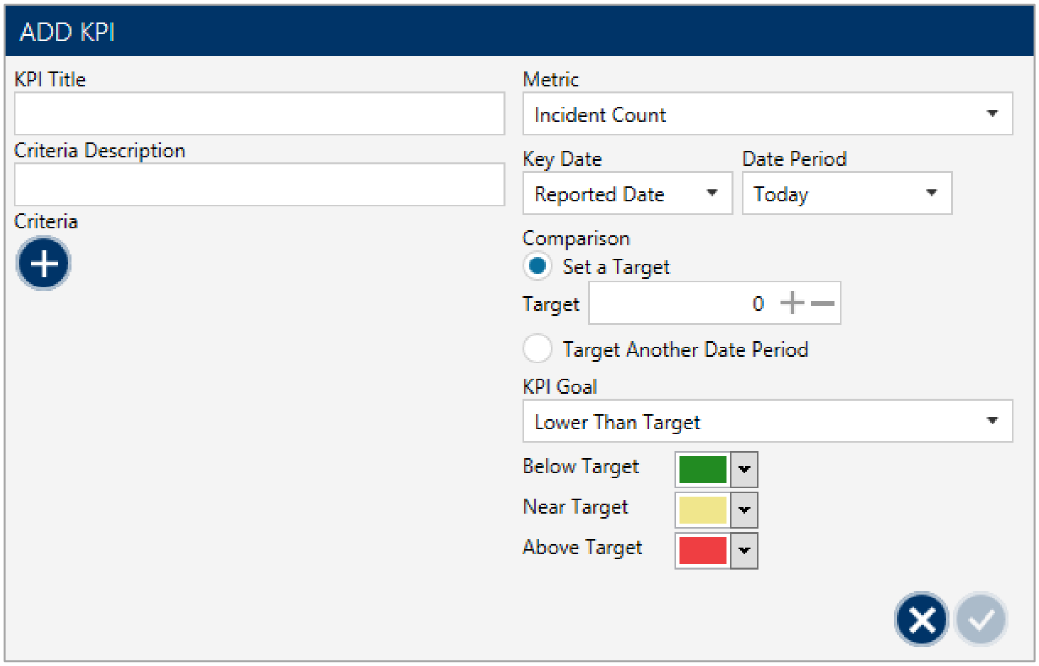
Add the KPI Widget

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.

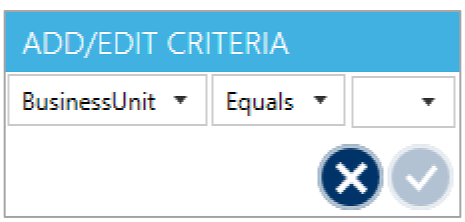
A blank KPI widget.

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.

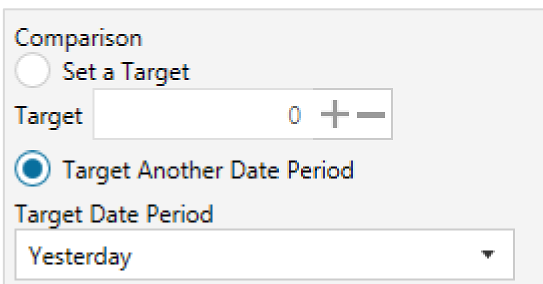
13. Select either **Activity Count**, **Case Count**, or **Incident Count** from the **Metric** dropdown menu.

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).

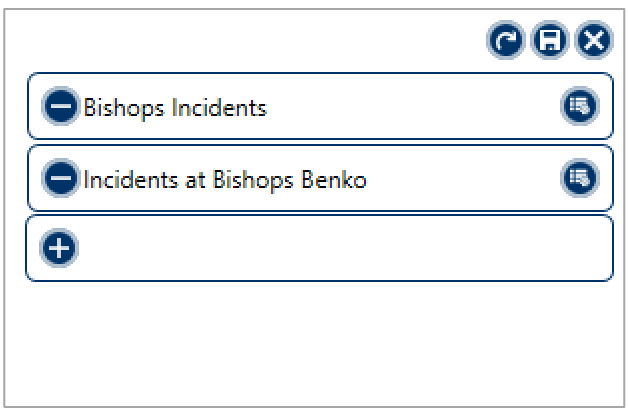
17. **Optional:** Select colors for **Below Target**, **Near Target**, or **Above Target** by clicking the color dropdown menus. From these dropdown menus, you can select a standard color or create a custom color by clicking **Advanced**.

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

18. Click the icon to save and return to the dashboard.

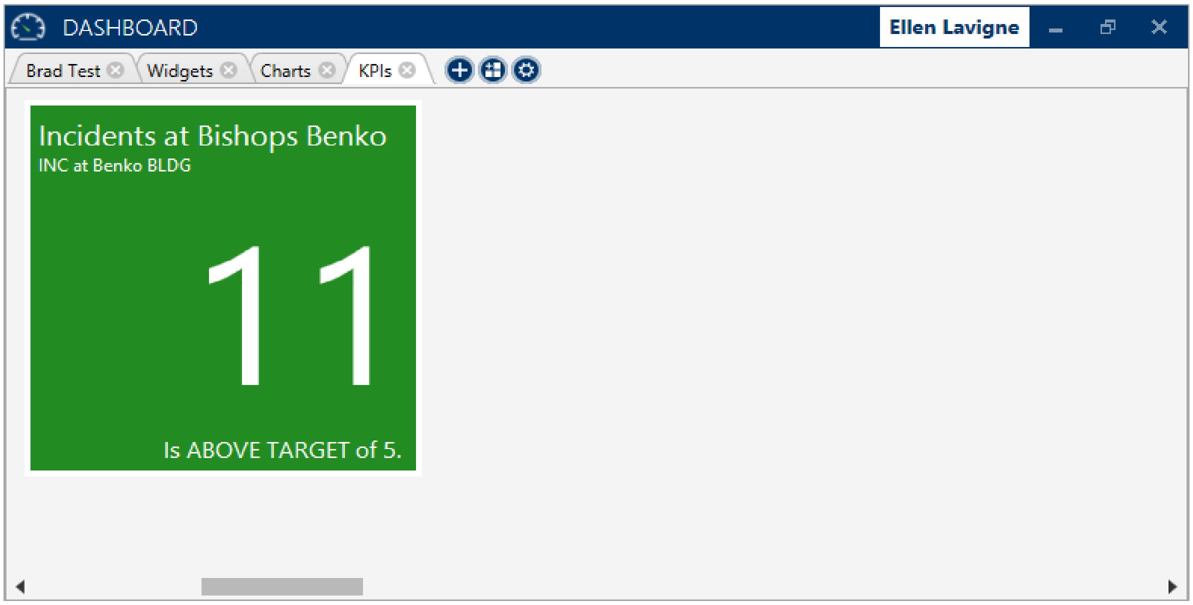
19. Repeat steps 4-18 to continue to add more KPIs, each of which will be displayed at regular intervals in the widget window.

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:

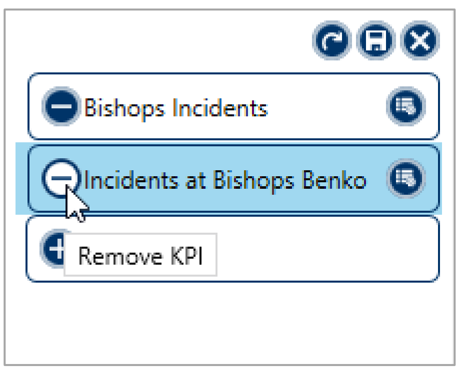
1. Hover your cursor over the KPI to reveal the widget toolbar.
2. Click the icon.
3. Click the icon next to the KPI you want to edit.
4. Make any required changes in the **Add KPI** window.
5. Click the icon to save and return to the dashboard.

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

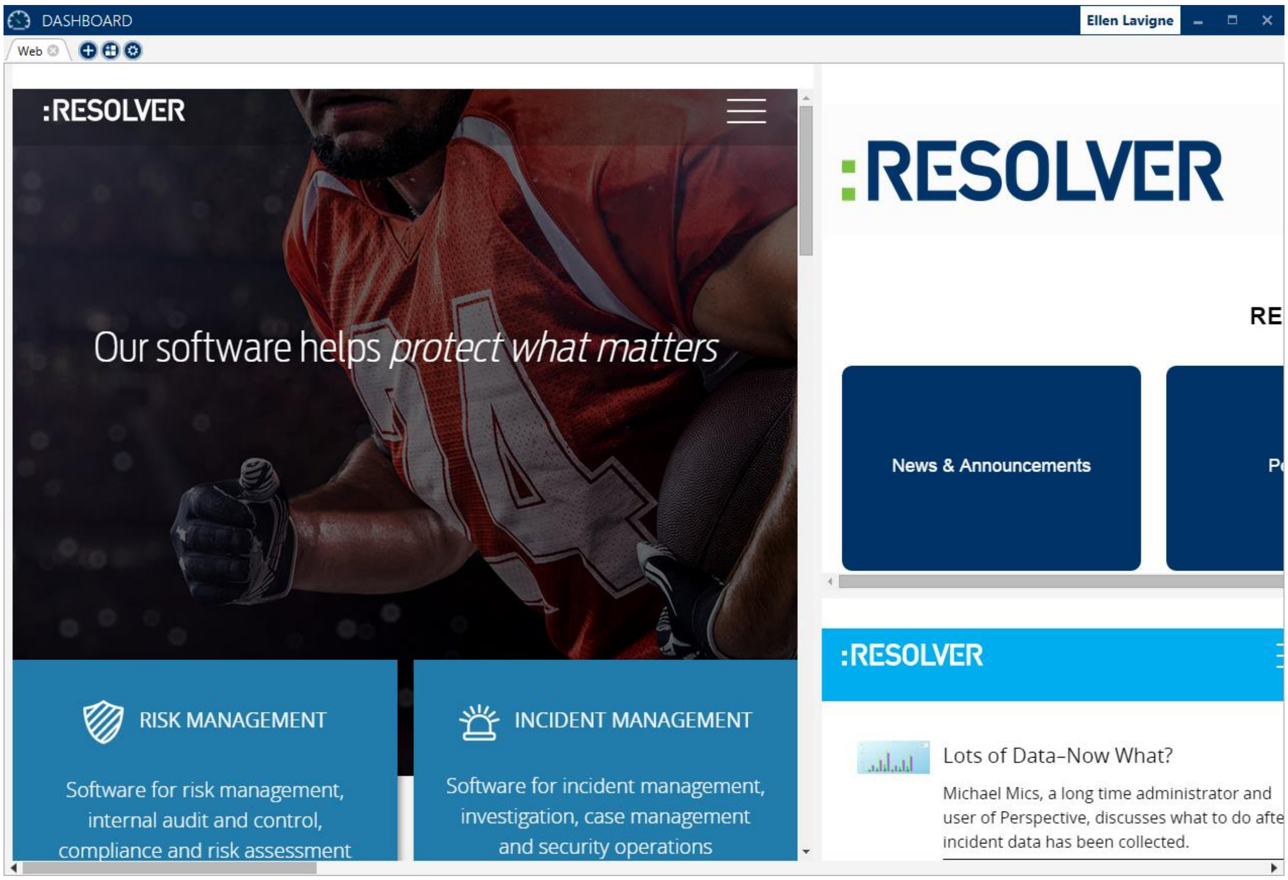
To delete and close the KPI widget:

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. the address **exampleaddress.com** would be acceptable provided 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** and adjust its settings, if needed.

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. Click and drag the widget to a new location on the dashboard.

Glossary

TERM	DEFINITION
Activity	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.
Case	A grouping of incidents related by person, item, location, class or other common trait that generally requires further investigation.
Dashboard	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.
Incident	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.
KPI	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).
Single Sign-On (SSO)	Login authentication that, if configured by a Perspective administrator, allows you to enter one set of credentials to access multiple Resolver desktop applications (Dashboard, Perspective, and/or Dispatch) without re-entering those credentials, as long as your session token (a temporary file that stores your credentials) remains active. The amount of time the session token is active is based on the settings of the SSO provider selected by your

	administrator, however, logging out of one Resolver application will end the session with all applications (e.g. if you click Logout in Dispatch, you will need to re-enter your login credentials to log into Perspective). Clicking the X at the top right of an application will keep your session token among the applications active.
Widget	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

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