PULSE DASHBOARD
REALTIME DATA MANAGEMENT SUITE

PULSE Dashboard & Reporting Software Fundamentals Training

(Updated May 2020)

Note that we offer unlimited group or one-on-one training and unlimited phone support.

Getting started with PULSE Dashboard

PULSE Dashboard allows you to create custom reports from your ERP data without the need for technical knowledge. We give you many 'out of the box' content reports and allow you to customize them to meet your unique needs. We even offer a 'Designer' module where individuals with SQL programming skills can develop their own reports.

Here are some suggestions to get started:

- You may feel overwhelmed with your data that needs to be corrected.
- Spend 15 minutes a day for a few weeks getting comfortable with the screens.
- Pinpoint the top 10 screens you want to start using in your job.
- You cannot accidently change someone else's screens.

Obtaining technical support

- You have unlimited phone/e-mail support and training with PULSE Dashboard.
- Contact us are (513)723-8095 or Support@PULSEDashboard.com

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Top 10 ways that PULSE bring you the right information

This list pinpoints the top ten areas within our PULSE Dashboard software, based on customer feedback.

1. Top level overview of pending and invoiced customer orders
2. Cash flow forecasting
3. On-time customer shipments analysis
4. Pinpointing finished goods shortages and pinpointing production shortages
5. Customer sales vs. your forecast (ability to analyze anything)
6. Inventory status (trends, months on-hand, activity, etc.)
7. Product costing analysis by month
8. Eliminate manual keying of purchase orders
9. Past Due Purchase Orders and pinpointing orders to be closed
10. Customize any report with no technical knowledge & without assistance from your IT staff

As a new user, where should I focus?

- Sorting
- Filtering
- Grouping
- Using the Column Chooser
- Right-mouse button options

If you can master the above five items, you can create or modify most any report.

Refreshing data

After starting PULSE Dashboard, the reports will need to be populated with values from your ERP software. This is done by refreshing the data.

- Refresh Current Module or Refresh All Modules - click on the button at the top of the screen. This reads the data from the database and populates the reports in PULSE Dashboard for either the current module that you are in or for all modules that appear on the menu.
- Refreshing every X minutes - click on one of the 'Auto-refresh' buttons next to Refresh Current Module or Refresh All Modules at the top of the screen and select the desired number of minutes. This may be set to a value between 60 and 1 minute. If the amount of time is set to a value less than the time that it takes to refresh, the system will never stop refreshing. Do a test refresh prior to setting this. It starts once you click 'OK'.
- Manual refreshing each report – Use the icon in the report header or double-click on the blue report header bar at the top of each report.
- Manual refreshing each tab – Use the right-click and select Refresh Tab or double-click on the tab header.
- Recommendation – Turn **OFF** the auto refresh option for all tabs that are not used every day or if your refresh times are long. Right-click on the tab name and un-check the 'Refresh with Module' check-box to make that a manually refreshed tab. This will improve overall performance when refreshing the Current Module or All Modules.

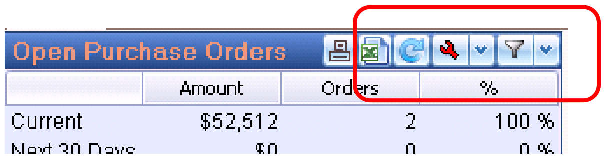
Customizing existing screens

Becoming proficient in PULSE Dashboard is not difficult. The more time spent using it the more comfortable the User will become with it. By mastering these functions the User will be able to change existing and create new reports for themselves and others quickly. A full explanation of all of these functions is provided below.

- Use the Column Chooser to change which columns are displayed on the report from a list of columns pertaining to that report
- Sort data retrieved from A to Z, Z to A, highest to lowest or lowest to highest
- Create filters to narrow the amount of data on a report to specific values retrieved from the total amount of data available
- Use Save & Share to share your screen layouts with others
- Publish tabs with multiple reports to "push" your screens to others

Report Icons

On each PULSE Dashboard screen, you will see several icons in the upper right corner of the report. These are used to control the information on this specific report. These icons will be seen throughout the system.



 The Print icon will allow you to print the report, export the information to several different formats (including PDF, CSV and others) and to email information directly from the report.

 The Excel icon will allow you to export the data on the report to Excel exactly as it appears on the report. All Report headers and column headers will also be exported. This is the easiest method to get information to Excel. Further manipulation of the data can occur in Excel by adding additional User defined columns to the spreadsheet, formulas and additional Excel functions as needed. Results from the spreadsheet do not post back to your ERP database or PULSE Dashboard. When you press the 'Export to Excel' button, PULSE Dashboard allows you to specify the file location and name. It then asks if you would like to open the file. If you answer 'yes', Excel is launched and your data is displayed.

*The Excel icon at the top of the screen near the Refresh All Modules button is not specific to a single report and has a different function. Using this button will take a screen image of all reports on the current tab and paste this as an object onto a new Excel worksheet. The values may not be manipulated nor used in formulas. This function is designed to capture a static "snapshot" of information at a given point in time and to be saved for future reference or sent via email.

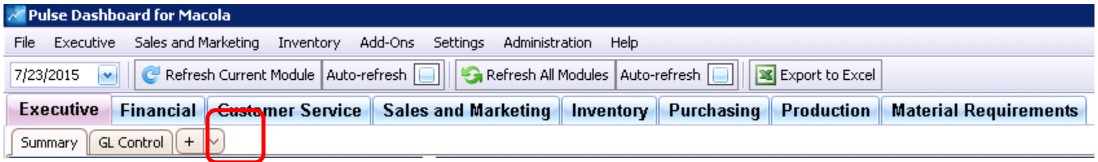
 The Setup (or Red Wrench) icon allows the User to control various settings on the report such as dates used as a basis for calculations, number of months to see, accounts to use and many others. The settings available on is icon will vary greatly by report as all reports differ in use and will have different parameters.

 The Filter icon will allow the User to narrow the amount of information retrieved from the database based on one or more columns and their contents. For example, two filters might be created to only view a specific value or range of values for (1) a Salesperson and (2) their Customers by State. (i.e. Joe Smith and Texas)

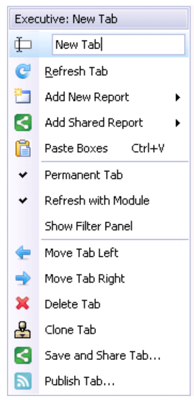
Adding New Tabs

Custom Tabs may be added within each module with reports added which allows the User the ability to group standard or custom reports in a way that works best for them. Tabs can then be Shared with or Published to other Users as needed.

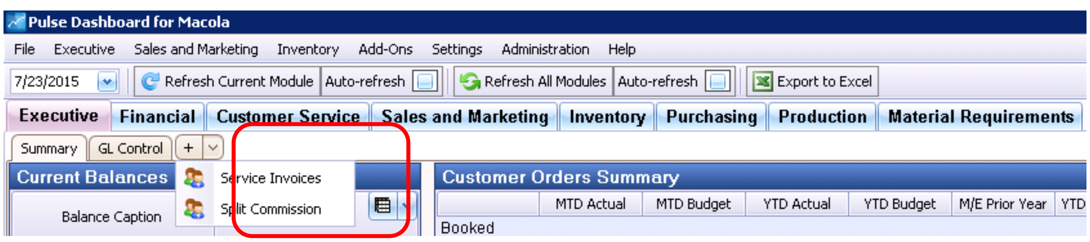
New Tabs may be added by using the "+" icon near the end of the row of existing tabs in a module. The New Tab will have no reports on it and the User can copy existing reports or add new reports as needed.



By using the right mouse button in an area outside of a report on the tab, the User can rename or otherwise control the actions of the new tab.



If another User has shared a Tab from their PULSE Dashboard screens it may be added by using the "V" icon to select the Tab(s) that has been shared to the User (two example tabs are shown).



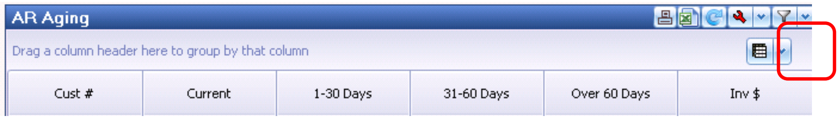
Adding New Reports

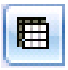
A new report may be added to a Tab in multiple ways:

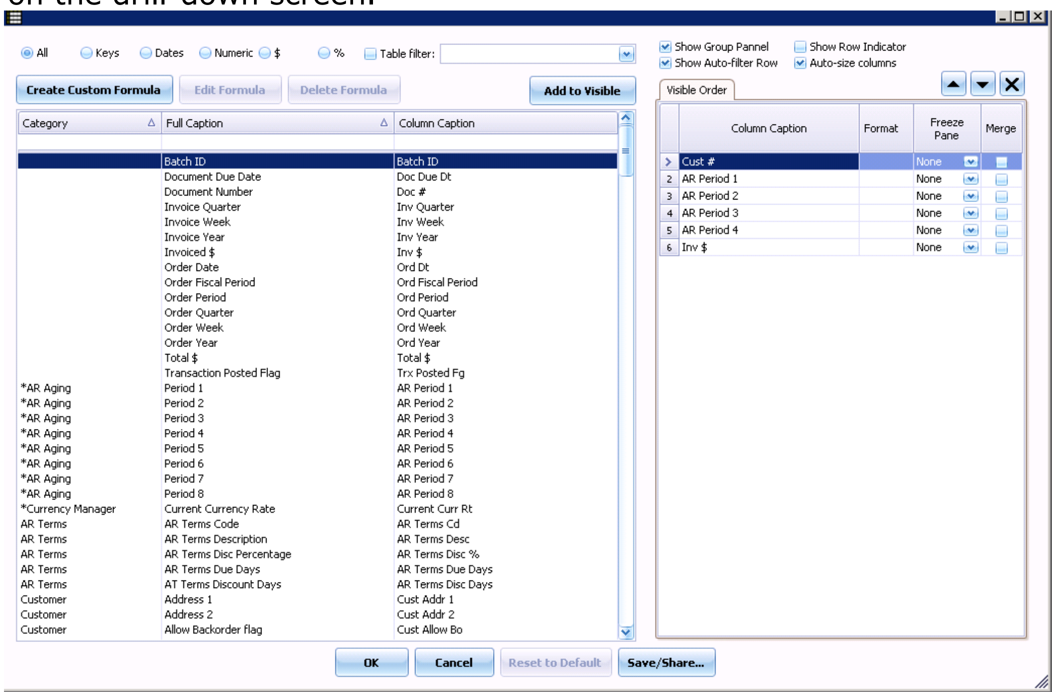
- Use the right mouse button on the Tab and select Add New Report
- Use the right mouse button on the Tab and select Add Shared Report
- Copy an existing report from another any Tab or Module in Dashboard

Modifying Reports

In addition to the report icons described earlier, the Column Chooser is also available on many reports or sub-reports.




The Column Chooser will allow the User to change the columns that appear on the report based on a list of columns associated with that report. Columns selected for the report may be added, deleted or re-arranged on the report. Custom Formula columns may also be defined and added to the report. Depending on the report this icon may be available on the main screen of the report or on the drill-down screen.



The Column Chooser screen is divided into two main sections. On the left side of the screen is a list of all of the columns available to appear on the report. The three columns that make up this section of the Column Chooser begin with the table in your ERP software or the calculated table from PULSE Dashboard that the column is from. The second column is the full name of the data column that may be selected to appear on the report and the third column is the abbreviated name of the data column. By highlighting the column to be added to the report and either selecting the Add-To button at the top or double-click on the data column name the data column will be added to the report.

The "blank line" below Category/Full Caption/Column Caption header line allows the User to type in the value of the Category/Full Caption/Column Caption as a search mechanism when adding columns.

The right side of the Column Chooser screen lists the data columns that have been selected for the report. The columns may be reorganized by highlighting the field to be moved up or down in the display order by using the up/down arrow buttons above the selected fields. Highlighting the data column and selecting the "X" button will remove the data column from the report.

When the User is finished making data column selections for the report, select the "OK" button to save the layout and return to the report screen.

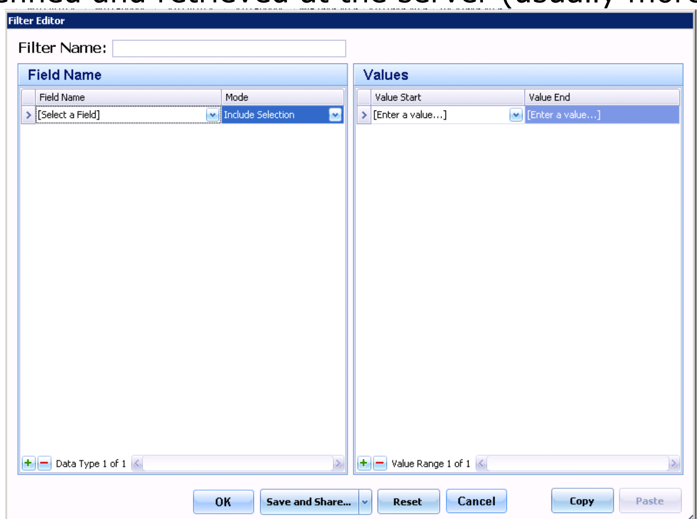
Sorting Reports

Information may be displayed on the report by sorting data retrieved from A to Z, Z to A, highest to lowest or lowest to highest. This is possible by either double-clicking the report column header to sort on or right-click on the report column header and select Sort Ascending or Sort Descending. The sort may also be cleared if no sort is required.

Filtering Reports

Reports may have more information than is required and the User may decide to focus on information for a single or group of customers, vendors, items, product categories, etc. This is accomplished on the report by adding a filter. There are several methods of applying filters to reports:

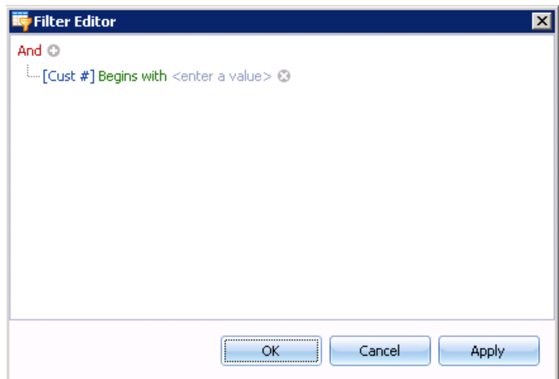
- Use the filter icon at the top right of the report to add a filter based on the information being defined and retrieved at the server (usually more efficient)



- Use the filter line on a report column by typing in the information needed in the "blank" line below the report column name (contains).
- This filter may be edited by using the Edit Filter button at the bottom right of the report.
- The filter may be temporarily disabled by unselecting the filter at the lower left checkbox.
- The filter may be permanently removed by clicking on the red icon at the lower left of the report.

- Right-click on the report column and select Filter Editor to create a more complex filter than

  created by typing in the data in the "blank line".
- This filter allows the User to add additional columns to filter on or change the original column, then change the operator (and, or, <, >, between, etc.) and enter the value(s) to filter on.



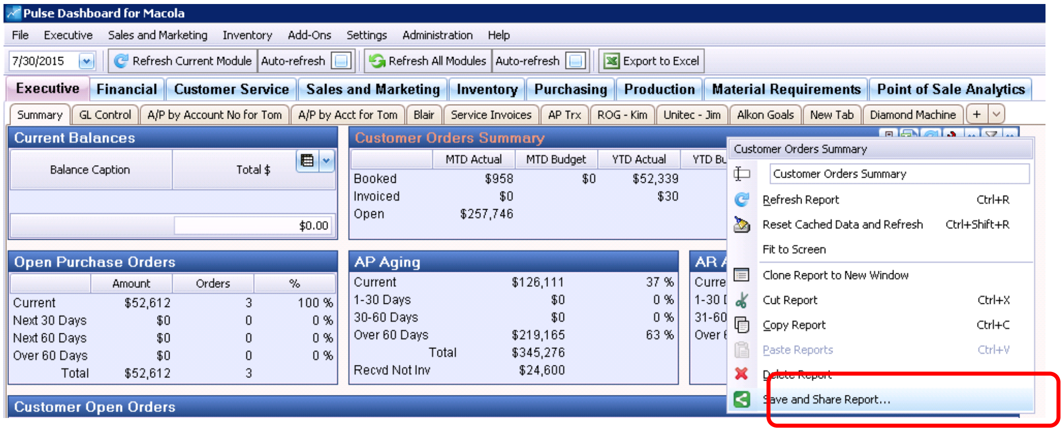
Save and Share Reports

The User may create a report that would be helpful to other Users in the company and would like to share this report with them. This is possible using the Save and Share function. Most anything may be shared in PULSE Dashboard such as reports, tabs, filters, etc.

The concept of Save and Share is similar to a library or used bookstore in that you have something that was written and now would like to allow others have a copy of it by putting a copy of it into the "library/bookstore". Once the material is in the "library/bookstore" other users may "checkout/buy" a copy of this material to use on their PULSE Dashboard screens.

When adding your work to the "library/bookstore" you may also define who may "checkout/buy" the work. The work does not automatically appear on their screen when you Save and Share it but you may notify them that it is available to them and they may add it to their Dashboard. When adding the work to their PULSE Dashboard screen, just like a book, it is their personal copy and may be changed or modified as they see fit without changing the work for anyone else.

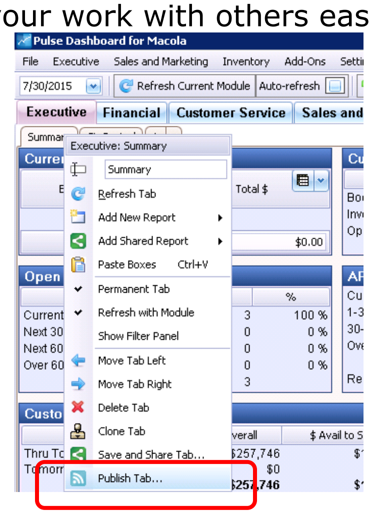
Save and Share may be found as an option on many screens in PULSE Dashboard or you may access it by doing a right-click on a report or tab header but the concept stays constant. It is a way to share your work with others easily.



Publishing Tabs

Different from Save and Share, Publish is a feature that may be performed at the Tab level. To Publish a Tab is to allow the User to add an entire Tab of reports (one or more reports) to another User's screen. The other User does not have to add the tab to their screen. After it has been published to them, the recipient will see the new Tab when they log into PULSE Dashboard the next time. The Publish function is setup for each User if Publisher rights are needed by your PULSE Dashboard Administrator.

Publish Tab may be found as an option on all tabs in PULSE Dashboard by doing a right-click on a tab header. It is a way to share your work with others easily.



Tips and Frequently Asked Questions

- Move all of your frequently used reports to tabs that will be used regularly and move seldom used reports to tabs that do not need to be refreshed daily.
- Recommendation – Turn **OFF** the auto refresh option for all tabs that are not used every day or if your refresh times are long. Right-click on the tab name and un-check the 'Refresh with Module' check-box to make that a manually refreshed tab. This will improve overall performance when refreshing the Current Module or All Modules.
- Remember that the right mouse button is a very useful tool. By using this on Tabs, the blue report header bar, report column header and many other places, a different menu of selections becomes available to provide tools used to customize PULSE Dashboard.
- When developing new reports, create a new tab and copy the report(s) that you want to use a basis for the new report to the new tab. This way you have a test area that will not change the original report. If it is "destroyed" the original is still available.

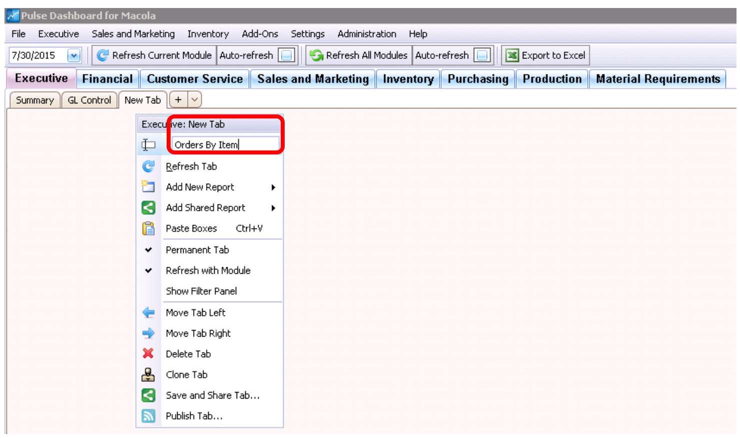
Training Exercises

This example will create a new Tab in the Executive Module with two new reports. One of the new reports will be for Customer Orders Booked, Invoiced and Open by Item for the current year. The second report will be for Open Purchase Orders by Item.

Create a New Tab

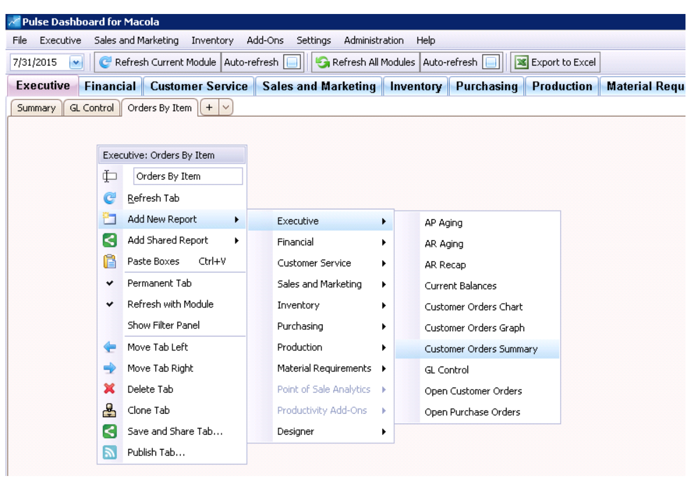
Click on the "+" tab at the end of the row of existing tabs

Change the Name of the new tab with a right-click and change the name field

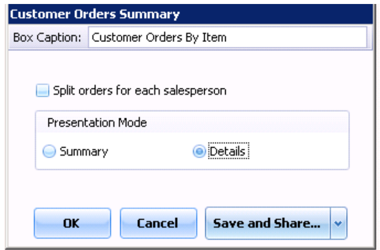


Create a New Customer Order Report

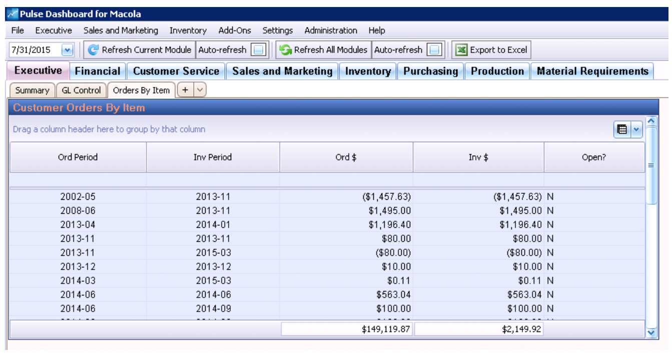
In the "empty" tab, right-click and select Add New Report > Executive > Customer Order Summary



Change the Report Name to 'Customer Orders By Item' and select Details for the Presentation Mode and select OK.

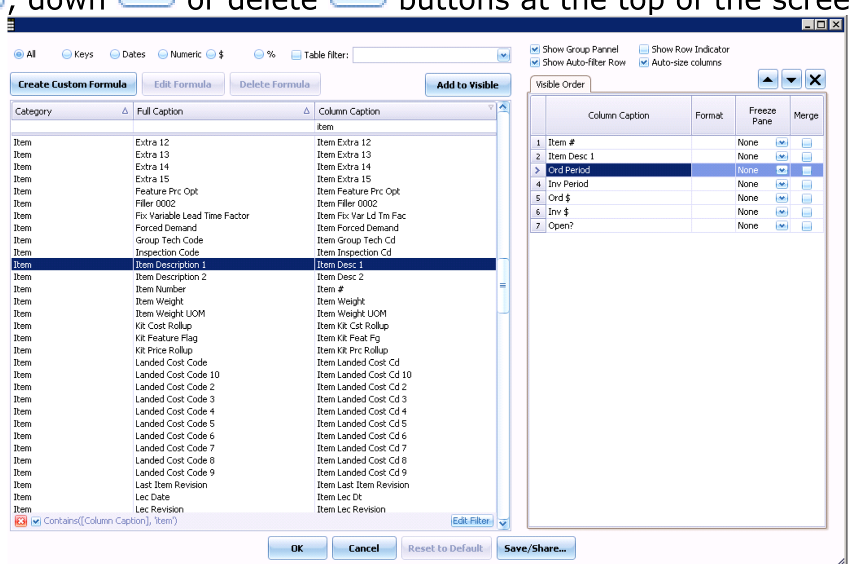


By selecting the Detail Presentation Mode notice that the Column Chooser icon has been added to the report. This allows the User to change the display columns on the report. Use your mouse to 'grab' the upper left or lower right of the report box and stretch it to make the report larger. Using the mouse, "grab" the report blue header bar to move the report on the tab.

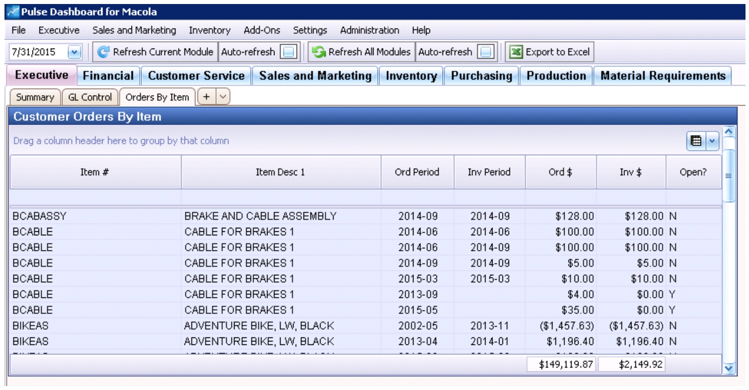


Select the Column Chooser icon to change the report display columns to include the Item Number and Item Description 1. Use the Column Search line to type in the column from the list and either double-click or highlight the column name and click the Add to Visible button at the top of the screen. This will move the selected column to the right side of the screen listing the columns to display on the report. Columns may be moved up or down in the display order or deleted using the

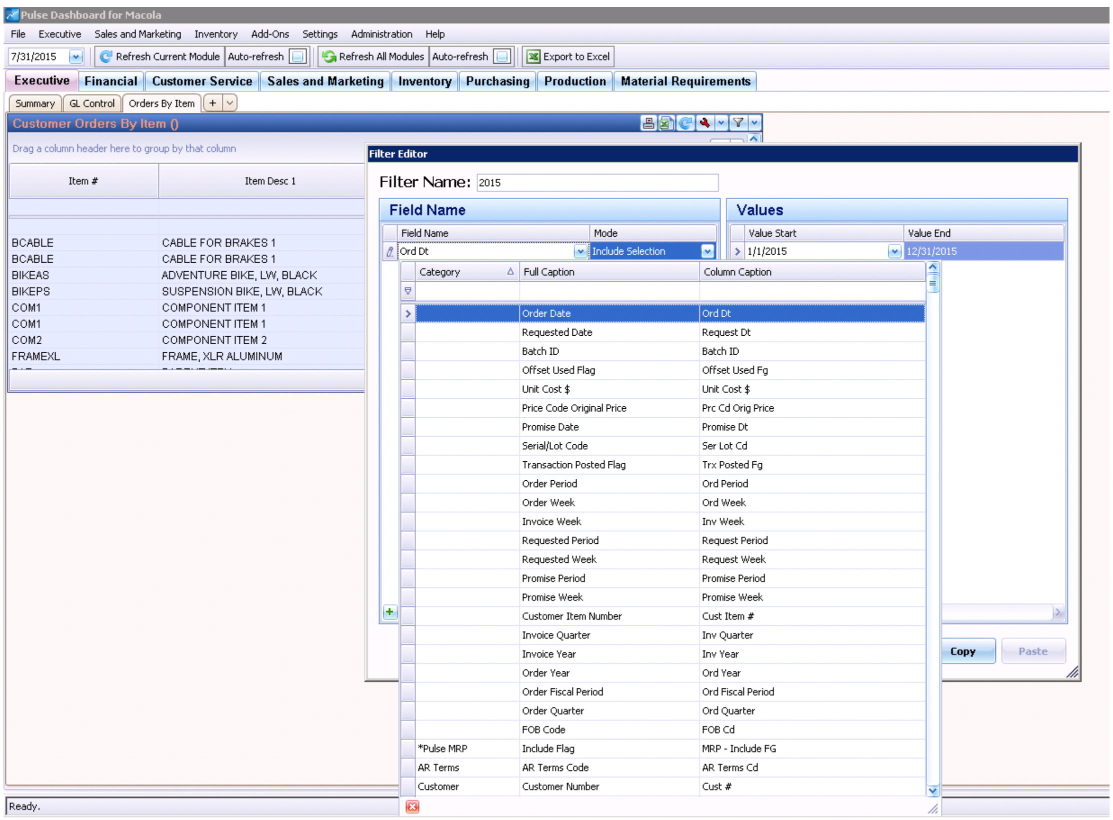
up , down  or delete  buttons at the top of the screen.



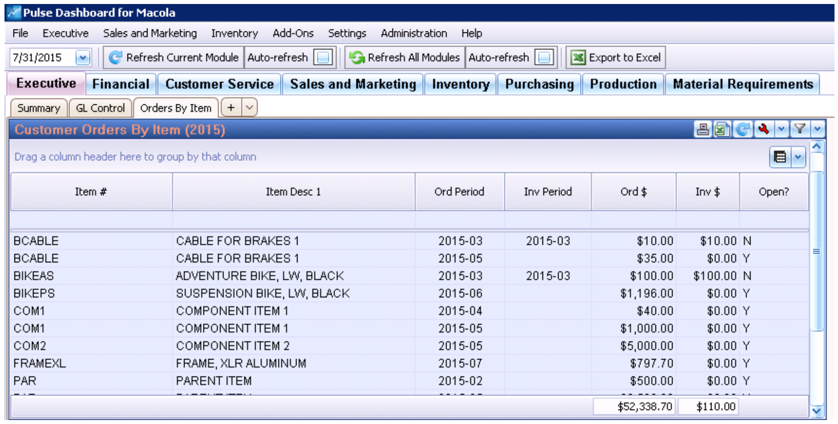
When finished select the OK button to save it and return to the report.



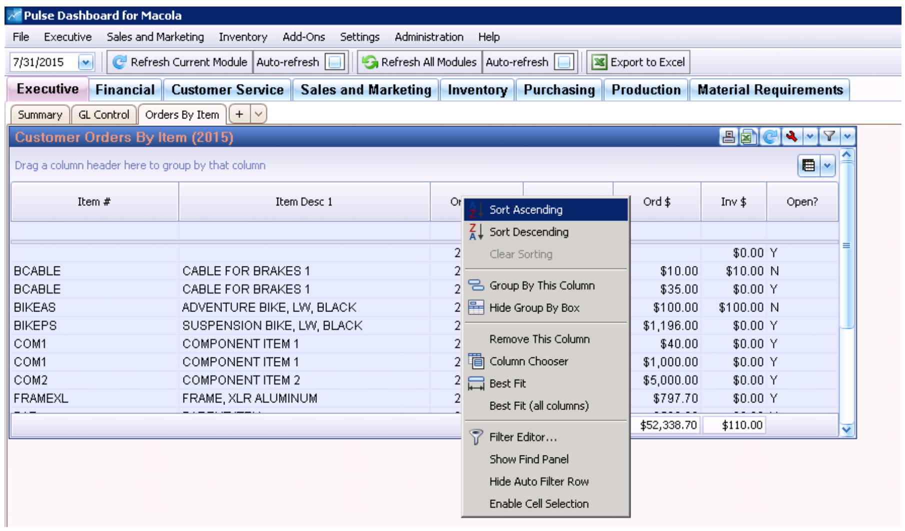
Add a Report Filter to only display orders entered in 2020 by selecting the Filter icon  on the blue report header. Add the Filter Name of 2020 at the top of the screen. Using the Field Name column select the Order Date column and Value Start and End range to include the range of dates for 2020.



When finished select OK to save and return to the report.



If the report should be sorted by Order Period, right-click the Order Period report header and select the Sort method needed.



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