Deltek

Deltek Ajera 10

Getting Started: Dashboard Designers

June 12, 2024

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This edition published June 2024.

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About Ajera dashboards

Ajera dashboards visually display content that you can use to monitor key information at a glance. Each dashboard organizes Ajera information in the form of charts or tables. You can access your dashboards from a tablet, smart phone, or workstation through a supported web browser.

What you see on your dashboards depends on your security settings and whether you are set up to design dashboards for yourself and others.
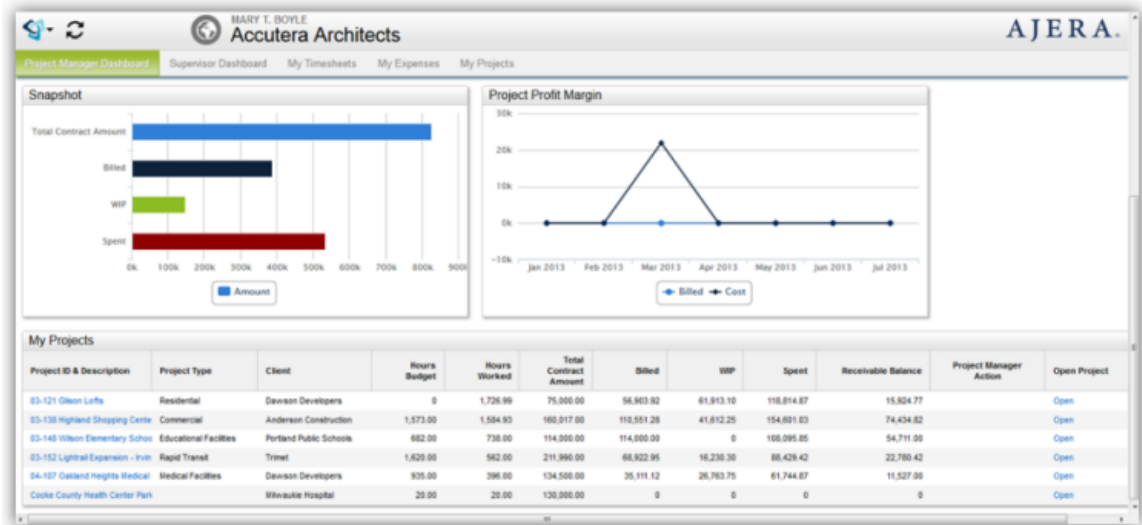
Dashboards for...

What you can do in your dashboards: Principals

Your dashboards allow you to easily determine the metrics that matter and see real-time views into your firm's health without digging through reports.

Dashboards are customizable to reflect the workflow at your firm. What you see on your dashboards depends on your security settings and whether or not you are set up to design your own dashboards.

Don't see what you need? Work with your manager to determine your dashboard needs.

Your information needs

As a principal, your dashboards can be set up to help you:

Analyze balances and trends in cash, accounts receivable, accounts payable, and work-in-progress.

- Track aging in accounts receivable and work-in-progress.
- Evaluate employee utilization throughout your firm.

These are just a few examples of what your dashboards can provide.

How do they work?

The dashboards display the information that matters the most to you:

- *Home page:* View an aggregate of your key information. With one look, you're instantly up-to-date.
- *<Variable> pages:* Click a link in a widget to go to a *<variable>* page that displays information specific to what you selected, such as the Project page.

This example illustrates how your dashboards may be set up:

(click to expand)
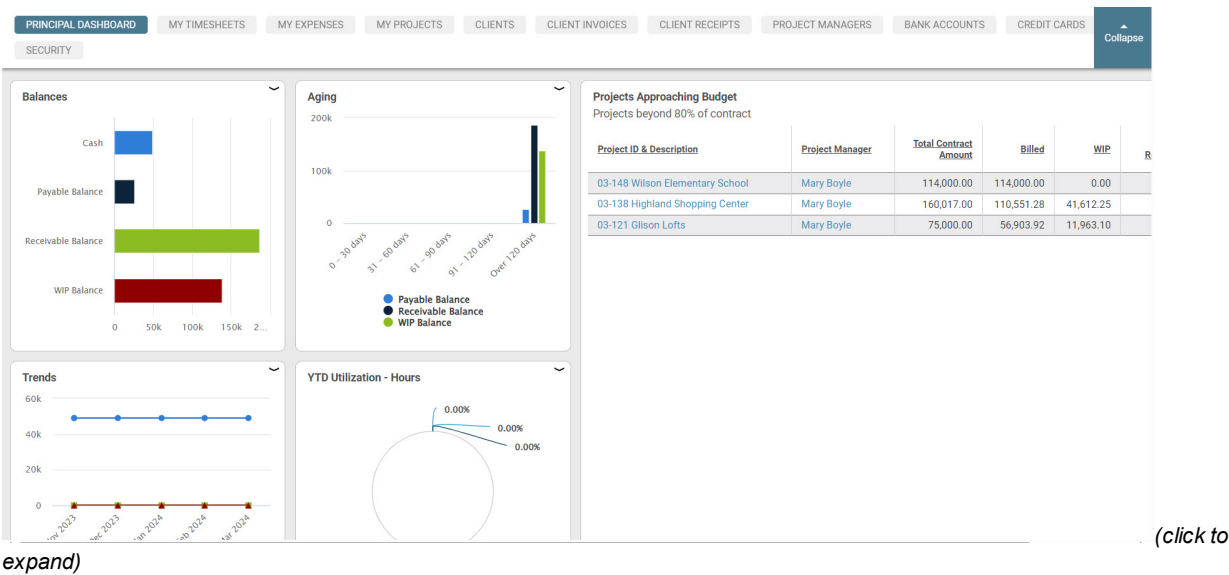
What you can do in your dashboards: Project managers

Your dashboards provide real-time snapshots of information you need to make critical decisions without the need to interpret data or view multiple reports.

Dashboards are customizable to reflect the workflow at your firm. What you see on your dashboards depends on your security settings and whether or not you are set up to design your own dashboards.

Don't see what you need? Work with your manager to determine your dashboard needs.

Your information needs

As a project manager, your dashboards can be set up to help you:

- See recent activity on your projects quickly.
- Access and review invoices instantly.
- Identify project slippage early.

These are just a few examples of what your dashboards can provide.

How do they work?

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This example illustrates how your dashboards may be set up:

(click to expand)
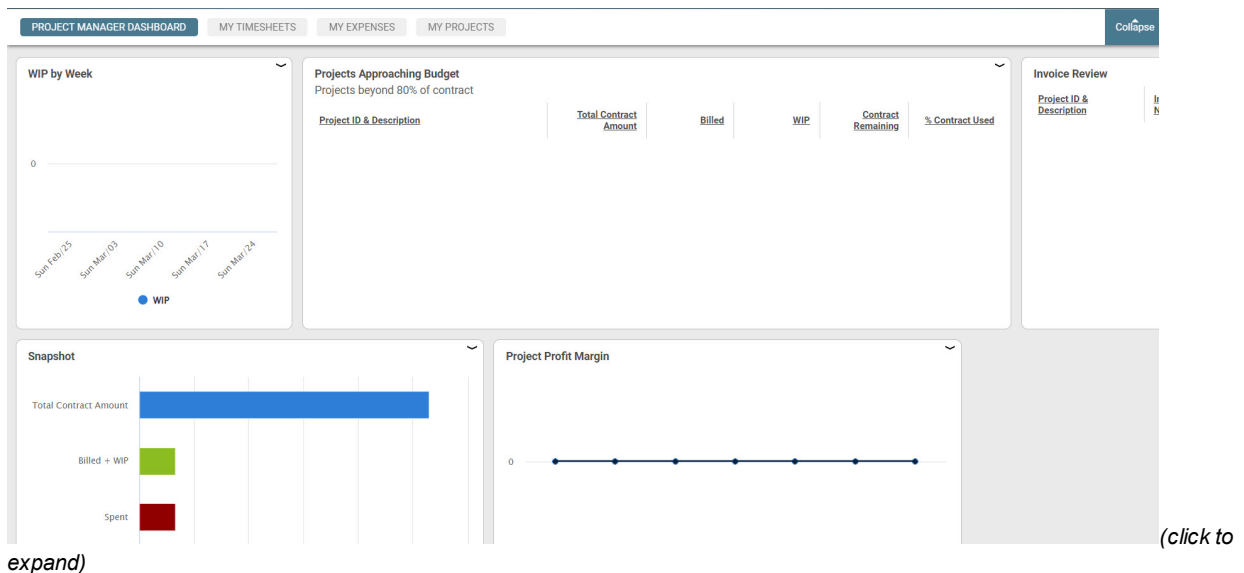
What you can do in your dashboards: Accountants

You have a wide range of responsibilities that require a constant flow of detailed information. Your dashboards cover your most important items and contain additional information that helps facilitate specific tasks such as billing, collections, and time and expense management.

Dashboards are customizable to reflect the workflow at your firm. What you see on your dashboards depends on your security settings and whether or not you are set up to design your own dashboards.

Don't see what you need? Work with your manager to determine your dashboard needs.

Your information needs

As an accountant, your dashboards can be set up to help you to:

- Monitor payments and billings from a single page, either by client or project.
- Analyze and improve payment and billing processes at your firm.
- Track client invoices throughout the billing review process.
- Quickly identify timesheet offenders.
- Easily see expense status.
- Ensure timely review and approval of timesheets and expense reports.
- Set up financial and project reports and disseminate them to those who need them.

These are just a few examples of what your dashboards can provide.

How do they work?

The dashboards display the information that matters the most to you:

- *Home page:* View an aggregate of your key information. With one look, you're instantly up-to-date.
- *<Variable> pages:* Click a link in a widget to go to a *<variable>* page that displays information specific to what you selected, such as the Project page.

This example illustrates how your dashboards may be set up:

(click to expand)
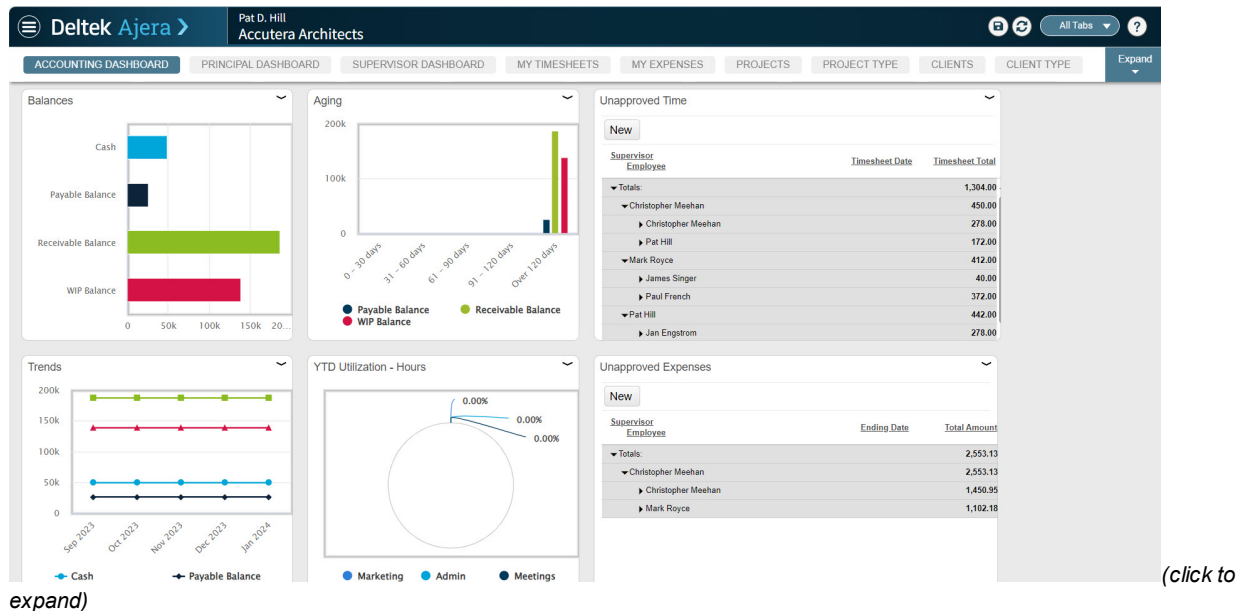
What you can do in your dashboards: Marketing specialists

With your dashboards, you can plan and manage potential new business, all from one centralized location.

Dashboards are customizable to reflect the workflow at your firm. What you see on your dashboards depends on your security settings and whether or not you are set up to design your own dashboards.

Don't see what you need? Work with your manager to determine your dashboard needs.

Your information needs

As a marketing specialist, your dashboards can be set up to help you:

- Easily track the progress of a potential project every step of the way - from the lead to the final disposition.
- Quickly view a listing of wins and losses over a period of time - such as the last month, last quarter, or last fiscal year - to gain valuable insight to trends and information that can help increase your win rate in the future.
- Instantly analyze the projects your firm is pursuing and efforts by segments such as department or market segment.

These are just a few examples of what your dashboards can provide.

How do they work?

The dashboards display the information that matters the most to you:

- *Home page:* View an aggregate of your key information. With one look, you're instantly up-to-date.
- *<Variable> pages:* Click a link in a widget to go to a *<variable>* page that displays information specific to what you selected, such as the Project page.

What you can do in your dashboards: Employees

Your dashboards are your central hub for information about timesheets and expense reports.

Dashboards are customizable to reflect the workflow at your firm. What you see on your dashboards depends on your security settings and whether or not you are set up to design your own dashboards.

Don't see what you need? Work with your manager to determine your dashboard needs.

Your information needs

As an employee, your dashboards can be set up to help you:

- Quickly view timesheet and expense report information.
- Easily access your past timesheets and expense reports.
- Keep track of your hours such as regular pay, overtime, vacation and sick time, and other types of pays.
- View utilization to quickly know your percentage of time that is billable.

These are just a few examples of what your dashboards can provide.

How do they work?

The dashboards display the information that matters the most to you:

- *Home page:* View an aggregate of your key information. With one look, you're instantly up-to-date.
- *<Variable> pages:* Click a link in a widget to go to a *<variable>* page that displays information specific to what you selected, such as the Employee page.

This example illustrates how your dashboards may be set up:

(click to expand)

Viewing dashboard information

To view dashboard information:

Click a relevant tab at the top of the dashboard and do any of the following to:

- Return to the previous page within Ajera, click ←
  Note: If you click your browser's Back button, it returns you to the previous webpage in your browser not your previous Ajera page.

- Return to the Home page, click ⊜ > 🏠 .

- Access the main menu, click ⊜

- Refresh your dashboard information and Ajera menu, click ↻.
 Note: If you click your browser's refresh button, it reloads Ajera and resets your page. This takes more time than the Ajera refresh.

To view chart information

Click tab at the top of the dashboard and do any of the following:

- View more details: Click a linked shape in a chart to go to the related tab.

- Hide a shape in a chart: Click the variable for that shape in the legend. To display it, click the variable again.

- View related information in a child widget that is blank: Click a shape in the parent widget. The child widget populates with information related to the selected shape.

To view table information

Click a tab at the top of the dashboard and do any of the following:

- Print: Click the **Print** button in your browser or press **Ctrl+P** on your keyboard.
  Your browser determines the quality of your printout.

- Drill down for more details: Click the blue text, which indicates that your Ajera Administrator created a link to another tab.

- See the full list of information: Click More... .

- View more than the first 500 results (if available): Click the **1-500** button at the bottom of the table. This button changes to **501-1,000**, **1,001-1,500**, and so on, as needed.

- Expand or collapse information: Click ⁞⁞ or ▬.

- View related information in a child widget - which is blank - click a row in the parent widget. The child widget populates with information related to the selected row.

- Filter, sort, and/or group on columns.

- Search a text column by keyword: Click the column heading, enter the keyword, and click **Search**. All matching results appear in the table. More details

Note:	• The search is not case-sensitive.
	• You cannot search for a blank field.
	• You can search only one column at a time.
	• Clicting ⟳ removes any search you applied.
	• The percentage character (**%**) is the wild card character. For example, searching by **ZZ%-A** on the Project ID column could return ZZ-A, ZZ1247-A, and ZZ-12/27/2012-A.
	• If the keyword includes the percentage (**%**), underscore (**_**), or left bracket (**[**) character, enclose the character in brackets. For example, enter **25[%]** for 25%, **pat[_]hill@accutera.com** for pat_hill@accutera.com, and **Accutera-[[]Oakland Heights]** for Accutera-[Oakland Heights].
	• You cannot search on the Revenue or Revenue Detail widgets.

Designing dashboards

About designing Ajera dashboards

Dashboards are visual tools that you can design to represent exactly what your company needs. Dashboards are built with widgets and tabs. These interactive building blocks give you the ability to design specific dashboards for specific roles and employees.

Ajera comes with out-of-the-box dashboard templates that you can edit to fit the information needs of your firm and your employees. Only the designer with the appropriate security role and dashboard designer settings can make those changes.

What employees see on their dashboards depends on their security and access settings. You can set Designer security to allow specific roles or individual employees to design their own dashboards, to design dashboards for others, or not to design any dashboards. You can also restrict what type of information dashboard designers can access on their dashboards, including labor cost, general ledger detail, employee information, or restricted custom fields.

Video: Creating a table widget (5:38)

Video: Editing a table widget (5:48)

Video: Table widgets: formulas and formatting (4:38)

Video: Edit Dashboard layout (1:34)

Video: Creating chart widgets (8:20)

How it works in Ajera

Learn more about each step in the designing dashboard workflow, illustrated below. Click on each task for step-by-step instructions.
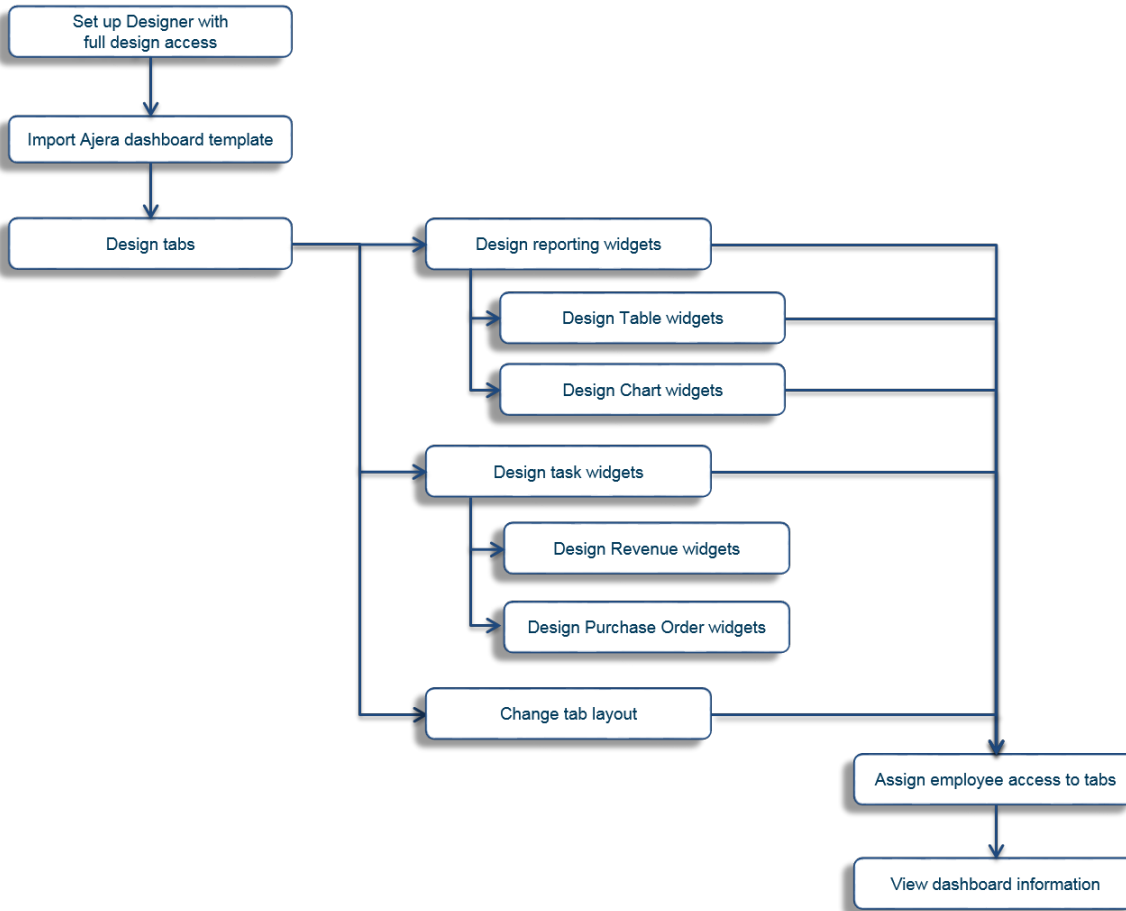
Setting up designer security

Setting up dashboard Designer access

Before you begin

- [Set up roles](#)
- [Set up custom fields](#)

To set up designer security

1. From the ☰ > **Setup** menu, click **Company** > **Roles**.
2. Ajera automatically contains these default roles: Administrator, Project Managers, Principal, Employee, Marketing, and Entry Clerks. Select the role on which you want to set designer security and click **Edit**.
3. Click the **Designer** tab.

4. Choose one of the following options to set the dashboard security for this role:

- **Not Allowed** restricts role members from changing any dashboards, including their own.
- **Partial** allows role members to change dashboards for themselves and, potentially, others. Go to the next step to set specific access options.
- **Full** gives role members full dashboard design capabilities, including the ability to:
    - View employee cost, even if the **View Employee Cost** check box is cleared on the **Company > Role > General** tab.
    - Set security on each tab to ensure that each employee views only the information needed.
    - Import and export dashboards and tabs.
    - Use SELECT SQL statements in widget formulas.
    - View all dashboards and tabs in Design mode.

    Note: Ajera automatically assigns the **Full** option to the **Administrator** role.

5. If you selected **Partial** in the previous step, select one or more of the following security options:

- **Design for others** enables role members to create dashboards for other employees.
- **Labor Cost** enables role members to view employee cost, even if the **View Employee Cost** check box is cleared on the **Company > Role > General** tab.
- **General Ledger** enables role members to view general ledger detail, balances, and accounts.
- **Payroll and Employee Information** enables role members to view payroll and employee information, including pay and personal information.
- **Custom Fields** enables role members to view information in custom fields.
  If you choose this option, the **Restricted Access in Designer** option appears. Select this check box to allow role members to view custom fields (Adding custom fields) that may contain sensitive information.

Assigning roles and employees to tabs

With tab-level security, you assign each tab only to the roles and employees who need it. While working on a tab, be sure that you are the only person with access to that tab. You can design it in a secure environment without others accidentally viewing confidential information, such as cost. Set tab-level security *only after completing a tab and testing it.*

Only employees who are set up with the appropriate designing security can assign roles or employees to dashboard tabs. Security is at the tab level, not at the page or widget level. Employees with multiple roles can view tabs to which any one of their roles has access. To ensure employees view information that pertains only to them, set widgets on the tab to filter by Current User.

> **Note:** If security on a tab is blank, that tab is visible only in Design mode. As soon as you assign a tab to a role or employee, it appears in employee dashboards. Mark tabs with *Display Separately* so that tabs are easier to find in Design mode.

Before you begin

- Create a list of the dashboard tabs and the roles and employees who can access them. Verify the tab-level security with your managers.
- Verify that you have the appropriate designing security.

To assign roles and employees to tabs

1. Click ⊜ > ✖ to open Design mode, and click the tab you want.
2. In the Tab Security area, click **Edit Security**.
3. Do the following:
   - Select the roles who can access the tab.
   - Select the individual employees who can access the tab.
4. Click 🖫 to save your changes and return to Design mode.
5. Repeat these instructions for the other tabs.
6. If using the Ajera dashboard template, click the **Security** tab to double-check your work. A list of the dashboard tabs and the roles and employees with access to them appears.
7. When finished, click ✖ **Exit Design Mode** to save your changes and return to the dashboard.

Setting up roles

Learning Resource: Security and Setup Functional Guide

To set up roles

1. From the ⊜ > **Setup** menu, click **Company** > **Roles**.
2. Ajera automatically contains these default roles: Administrator, Project Managers, Principal, Employee, Marketing, and Entry Clerks.

   You can view or change options for a role, as needed.
3. Click the **New** button.
4. Set up general security.
5. Set up dashboard Designer access.
6. Set up company security.
7. Set up security for other setup tasks.
8. Set up security for Manage menu tasks.
9. Set up security for projects.
10. Set up security for reports.
11. Set up security for inquiries.
12. Click the **Attachments** tab, and add attachments, by linking to any files related to the role. A linked file must be in a shared location for other people to open it (for example, on a shared network or a website).
13. Click the **Notes** tab, and type any notes or comments about this role.
14. Click **Save**.
15. Repeat these instructions to add additional roles.
16. Click **Close**.

Adding custom fields

To add custom fields

1. From the ⊜ > **Setup** menu, click **Company** > **Custom Fields**.
2. Double-click on the area of Ajera you want to see a custom field. Choices include: Account, Activity, Bank account, Client, Contact, Department, Employee, Project & phase, and Vendor.
3. Click **New**.
4. Enter the following information:

For	Do this to
Status	Make the custom field available for use, leave the status as Active.
Available for custom invoice formats	This check box appears only if you selected: Activity, Client, Contact, Employee, Project & phase, or Vendor in Step 2. Select this check box to make this custom field available in the Client Invoice Designer.
Restrict access in Designer	Check this box to indicate that this custom field may contain potentially sensitive information. Setting this option allows you to restrict who can use this custom field when designing dashboards. See Setting up dashboard Designer access for steps on setting up dashboard designer roles.
Display name	Type the name you want to appear on the window. **Note:** Click the **Project Info** tab > **Billing** subtab.
Internal name	Type a name to be used by the Ajera database. This name cannot contain spaces or special characters, such as \ / : * ? " < > |.

For	Do this to
Tab name	Type the name of the new custom tab where you want the field to appear. Custom fields appear only on custom tabs. When you add the first custom field to a window, Ajera creates a new tab for it. To add additional fields to the same tab, use the same tab name when creating those fields.
Type	**Note:** You cannot change a custom field's type once entries have been made to it. Choose one of the following types for your custom field: • **Text** creates text fields. Ajera recognizes URLs entered into custom text fields as clickable web page addresses. You must include the entire address, using either http:// or https://. Then, when you double-click the URL in the custom text field, that web page opens. In the Maximum Length field, type the total number of characters allowed in your field. Text fields cannot exceed 1000 characters. • **Memo** creates notes fields. • **Custom list** creates selection lists. In the Value field, type a list of items you want to appear on the list. Type one list item per row. Use the arrows on the lower corner to reorder your items. Select the **Allow edit** check box to allow entry of a value into the field. Do not select the check box if you want to select only from the list. • **Number** creates number fields. Identify the highest (no higher than 999,999,999,999.99) and lowest (no lower than -999,999,999,999.99) number that can be entered in the field. Identify the number of digits to appear after a decimal point (maximum of 10). • **Date** creates date fields. Ajera converts an entry to a standard U.S. date format of *mm/dd/yyyy*. It also displays a calendar to allow selection a date. • **Checkbox** creates a check box you can select or clear. For the check box to appear selected automatically, select the **Default to checked** check box.

5. Click **OK**.

6. Repeat the above steps to create other custom fields.

7. Click ⬆ and ⬇ to change how the fields appear on the window. Ajera automatically groups all fields on the same tab together in the list.

8. Click **Close**.

Working with tabs

Setting up tab groups

When designing your dashboards, your Tabs can be grouped to provide better organization and reduce clutter.

To set up tab groups

1. Click ⬤ > ⊗ to open Design mode.
2. In the All Tabs drop down menu, select Edit Tab Groups.
3. In the **Add group** entry field, enter a name for the tab group.
4. Click the ⊞ to add the tab group.

Setting up tab groups

When designing your dashboards, your Tabs can be grouped to provide better organization and reduce clutter.

To set up tab groups

1. Click ⬤ > ⊗ to open Design mode.
2. In the All Tabs drop down menu, select Edit Tab Groups.
3. In the **Add group** entry field, enter a name for the tab group.
4. Click the ⊞ to add the tab group.

Changing Tab groups

By default, the last tab group selected will be the group that displays.

To change tab groups

1. In the main header on the dashboard, click the All Tabs drop down menu.
2. If in Design mode, the list contains:
   - All Tabs
   - Edit Tab groups
3. If not in Design mode, the list contains:
   - All Tabs
   - Favorite Tabs
   - Tab groups the user has permission to

 | **Note**: | You cannot navigate to another tab group while viewing quick reports. Click back to change tab groups. |
   |---|---|

Assigning Tab groups

To assign a tab group

1. Click ⬤ > ⊗ to open Design mode.
2. In the All Tabs drop down menu, select **Edit Tab Groups**.

3. Under All Tabs, select the tab you want to add to a group.

4. In the drop down, select the name of the group to add the tab to.

5. Click **OK** to save changes.

Deleting Tab groups

To delete a tab group

1. Click ⬤ > ✖ to open Design mode.

2. In the All Tabs drop down menu, select Edit Tab Groups.

3. Click the ✖ to delete the tab group.

Setting up security for Tab groups

Importing/Exporting tabs

Before you begin

- Before importing any tabs, first back up your current tabs by exporting them to a secure location. Importing all tabs overwrites your existing dashboard.

- To import tabs, you must have the Administrator security role (⬤ > **Setup** > **Company** > **Roles**). Only Administrators can import tabs.

- Verify that the tab you want to import has a file extension of *.Ajera.*

- Verify that the security settings on the **Security** tab are what you want.

| Note: | - If importing a single tab, there is no need to export your current tabs. The single-tab import process retains all current tabs.
- When importing a single tab, the import process will not include any tab security roles unless you choose the **Include security Roles when importing** option.
- When importing all tabs, the import process retains the security settings of all the tabs and adds roles and employees to the **Edit Roles** and **Employees** window, if needed. |
| --- | --- |

To import/export tabs

1. From the ⬤ > **Setup** menu, click **Utility** > **Dashboard Import/Export**.

2. Click one of the following:
   - **All Tabs**
   - **Single Tab**

3. Check **Include security Roles when importing** if you want the tab security roles to import when importing a single tab.

Note :	When importing a single tab, if the role on the tab you are importing does not exist in your database, a new role **will not** be created.
	When importing a dashboard using all tabs, security roles **will** be created.

4. Choose of the following options:

- Click **Import**, select the dashboard file (with a file extension of *.ajera*), and click **Open**.

Note:	To import the standard Ajera dashboard template, navigate to the network drive where Ajera is installed. The dashboard template file resides in the Ajera\Program\Templates folder.

- Click **Export** and navigate to where you want to save the exported dashboard file. Give the file a descriptive name (with a file extension of *.ajera*) and click **Save**.

5. Confirm the import/export.

Note:	To finish the import process and refresh your dashboard, Ajera logs you out.

Designing tabs

Tabs group similar content and help you navigate quickly.

Before you begin

- Verify that you have the appropriate designing security.

To design tabs

1. Click ☰ > ✖ to open Design mode.
2. Go to the Tab Security area and confirm that you are the only person who can access the tab.

Note:	If security on a tab is blank, that tab is visible only in Design mode. As soon as you assign a tab to a role or employee, it appears in those people's dashboards. So, set tab-level security for others only after completing a tab and testing it.

3. In the **Home page** area, click **✚Add Tab**. **New Tab** appears as the last dashboard tab.

Note:	When adding a tab, the tab will default to the current tab group.

4. Enter a name for the tab.
5. Select one or more of the following:
   - **Desktop** if the tab is viewable on a desktop computer, ON will display.
   - **Tablet** if the tab is viewable on a tablet computer, ON will display.
   - **Copy Tab** Creates a new tab by copying an existing tab. Enter a new name and select its display properties.
   - **✖ Delete Tab** Removes an existing tab.
6. In the **Group** drop down menu, select a tab group to add the tab to or select **Link Only** to have the tab be only accessible via a link on a page.

Note:	If a tab is set to Link Only, it can only be accessed via a link on a page or while in Design Mode.

7. In the **Notes** field, enter information that explains or provides context for the tab. This text appears only in Design mode.

8. In the **Target Resolution** field, select the display resolution. This field allows you to view the tab as if you were using a computer with any of the following screen resolutions:

- Default
- 1920x1080 (HD 1080)
- 1600x900
- 1366x768
- 1280x720 (HD 720)
- 1152x864 (XGA+)
- 1024x768 (XGA)
- 800x600 (SVGA)

9. Add the following type of widgets:

- Chart widgets
- Table widgets
- Revenue widgets

10. Change the tab layout.

Assigning roles and employees to tabs

With tab-level security, you assign each tab only to the roles and employees who need it. While working on a tab, be sure that you are the only person with access to that tab. You can design it in a secure environment without others accidentally viewing confidential information, such as cost. Set tab-level security *only after completing a tab and testing it.*

Only employees who are set up with the appropriate designing security can assign roles or employees to dashboard tabs. Security is at the tab level, not at the page or widget level. Employees with multiple roles can view tabs to which any one of their roles has access. To ensure employees view information that pertains only to them, set widgets on the tab to filter by Current User.

> **Note:** If security on a tab is blank, that tab is visible only in Design mode. As soon as you assign a tab to a role or employee, it appears in employee dashboards. Mark tabs with *Display Separately* so that tabs are easier to find in Design mode.

Before you begin

- Create a list of the dashboard tabs and the roles and employees who can access them. Verify the tab-level security with your managers.
- Verify that you have the appropriate designing security.

To assign roles and employees to tabs

1. Click ☰ > ⚙ to open Design mode, and click the tab you want.

2. In the Tab Security area, click [✎ Edit Security].

3. Do the following:

- Select the roles who can access the tab.
- Select the individual employees who can access the tab.

4. Click 🖫 to save your changes and return to Design mode.

5. Repeat these instructions for the other tabs.

6. If using the Ajera dashboard template, click the **Security** tab to double-check your work. A list of the dashboard tabs and the roles and employees with access to them appears.

7. When finished, click ⊗ **Exit Design Mode** to save your changes and return to the dashboard.

Designing quick reports

A *quick report* presents aggregate information from the Ajera database. You access it from the ☰ > **Reports** menu, not from a dashboard.

Before you begin

- Verify that you are set up with Designer security.

To design quick reports

1. From the ☰ > **Reports** menu, click **Quick Reports** > **Design Quick Reports**.

2. Follow the instructions for designing tabs. Each quick report appears as a tab.

3. Design Chart widgets, Table widgets, or Revenue widgets.

4. Assign roles and employees to tabs

    The quick report appears on the ☰ > **Reports** > **Quick Reports** menu for the roles and employees you select. They may need to click ↻ to refresh their menu.

Changing tab layout

To ensure your dashboards convey information effectively, size and position your widgets using the Layout mode. Click and drag widgets to the right size and the right place using the layout grid for guidance.

Video: Edit Dashboard layout (1:34)

Before you begin

- Verify that you have the appropriate designing security.

To change tab layout

1. Click ☰ > ⊗ to open Design mode, if needed.

2. Click the tab you want to change.

3. In the Tab Properties area, click ⊞ **Edit Layout** to open Layout mode. The following icons appear in the grid:

    - ☷ - Chart widget
    - ⊞ - Table or Revenue widget

3. To enable scrolling on a widget, select **Enable Scrolling**.

4. To move a widget, place the cursor over the widget. When a four-headed arrow appears, drag the widget to a new location.

5. To resize a widget, you can:

- Place the cursor on the edge of the widget. When a two-headed arrow appears, drag the edge to increase or decrease the size.
- For Table widgets, you can click **Height:** to change the table height to Unlimited. A height of *Unlimited* means the height can increase to a maximum of 500 rows for a desktop device and 100 rows for a mobile device.
- For table widgets, you can click **Width** to change the table width to Unlimited.

  When Unlimited is selected for the width, the widget will dynamically expand based on the information displayed in the widget.

6. To freeze the widget heading, ensure the **Enable Scroll** option is selected and **Widget Height** is set to Unlimited.
7. When finished, click one of the following to:
   - 💾 Save your changes and return to Design mode.
   - ← Discard your changes and return to Design mode.

Working with widgets

About widgets

Widgets are the basic building blocks you use to create tabs and dashboards. *Bases* are information sources for widgets. Bases, and their corresponding columns, pull information from the Ajera database, such as project details. With the right Base, you can build widgets that provide information that is critical to your company.

You can design two types of widgets:

- Reporting widgets
  - Chart widgets present information in a line, column, bar, pie, area, donut, funnel or scatter graph.
  - Table widgets present information in the familiar column-and-row format.
- Task widget
  - Revenue and Revenue Detail widgets present your company's revenue picture by calculating revenue and work-in-progress (WIP) entries for your General Ledger.
  - Purchase Order widgets present information about your company's purchase orders.
  - Journal Entry widgets present information about your company's journal entries.
  - Credit Card Import Log widgets presents information about imported credit card items.
  - Payroll Service Accrual widgets present information about your employee's accrual.
  - Manage Projects Widgets present information for RPC and RPC date on your projects and phases.
- Other widgets
  - PIM Info Zone
  - PIM Personal Zone

Viewing the widget Gallery

The widget Gallery is a collection of widgets built with the end user in mind. This is your starting point to find our most popular pre-built widgets. The Gallery provides an easy starting point when creating a new widget to add to your dashboard.

When new gallery items are available, the gallery item will appear with a red banner that says "New"

A gallery item can contain a single widget or multiple widgets. The number in the blue circle indicates how many widgets are part of that gallery item.

1. Click ⊜ > ⊗ to open Design mode, and click the tab you want to add the new widget(s) or select **Add Tab**.
2. In the Tab Properties area, click ⚏ **Add Widget**.
3. In the **Add Widget** window, click **Browse Gallery**.

   You can use the search field or browse the different categories to find the widget you need.

To add a widget from the Gallery

1. Navigate to the gallery item you want to add.
2. To preview a gallery item click on it.
3. Click **Add Widget**.
4. To edit the widget before adding it, click **Open Designer**.

   A gallery item can contain more than one widget. The number in the blue circle indicates the number of widgets in the gallery item. If there is more than one widget in the gallery item, you cannot Open in the designer directly from the gallery. You must add the widgets and then open each widget to customize.

   The gallery item is added to the current tab at the bottom of the page.

   To edit the widget after adding it, edit the widget by selecting Edit from the widget menu.

Designing widgets

Designing Table widgets

Table widgets present information in the familiar column-and-row format. Use Table widgets to:

- Generalize information from a large number of categories
- Display the data in a familiar format that is easy to scan - across rows and down columns
- View a list of linked items that you can scan quickly and click for more information, if needed

For example, to ensure that supervisors approve timesheets in a timely manner, design a table that displays the total number of submitted hours, grouped by supervisor. When clicked, the supervisor link expands to show the names of the employees who submitted timesheets, with the corresponding timesheet dates and hours. You can link the employee names to a tab on the employee page and the timesheet dates to a tab on the timesheet page to provide even more information.

Video: Creating a table widget (5:38)
Video: Editing a table widget (5:48)
Learning Resource: Table Widgets Functional Guide

Before you begin

- Verify that you have the appropriate designing security.

To design Table widgets

1. Click ⊜ > ✕ to open Design mode, and click the tab you want.

2. In the Tab Properties area, click ⊞ **Add Widget** or on a widget you want to change, click ⌄ to open the widget menu and click:

   - ⚙**Edit**: Opens the Designer and displays the widget settings. Change them, as needed.
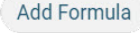
   - ⎘**Copy**: Opens a screen that allows you to choose where to copy the widget to. Click ⚙**Edit** and change the widget settings, as needed.

   - ✕ **Delete**: Removes the widget.

3. Under **Reporting**, click **Table** or select a widget from the Gallery.

4. Select a widget Base. View the available Bases here.

5. Click **OK**.

6. Select available columns by expanding one or more of the following options (if available) or search using the search field:

   - General Information

   - Dates

   - People

   - Hours/Units

   - Dollars

   - Accounts

   - Keys

7. Click Add Formula to add a formula column to the widget.

8. Click **OK**.

9. Edit Grouping options.

   a. Click **Edit Grouping Options**.

   b. Click the columns you want to add grouping options on,

   c. Select a grouping option:

      - **Expanded**: Show all the categories with the applicable data under them.

      - **Collapsed**: Show only the categories - click the plus sign next to a category to see the applicable data for it

      - **No Detail**: Shows only the categories, but without the ability to expand

11. Edit Sort options.

    a. Click **Edit Sort Options**.

    b. Click the columns you want to add sorting options on,

    c. Select a sorting option:

       - **Ascending:** Show numbers from lowest to highest, or show text in alphabetical order

       - **Descending:** Show numbers from highest to lowest, or show text in reverse alphabetical order

    d. If you have grouping on a column, you have the option to sort integer and decimal columns by the grouped columns.

12. Edit Table options.

a. Click **Edit Table Options**.

b. Set the number of records you want to see.

c. Set conditional row formatting.

15. To preview the widget, click the **Refresh** button next to Widget Preview.

16. Click ⊟ to save changes.

Designing Chart Widgets

Chart widgets present information in a line, column, bar, pie, area, donut, funnel, scatter, or bubble graph. Use Chart widgets to:

- Focus on a small number of categories
- View how they relate to each other or how they change over time
- Represent the data in a graphical form

For example, to focus on only the company *balances*, design a bar graph that displays the balances for cash, accounts payable, accounts receivable, and work-in-progress.

See more chart widget examples.

Learning Resource: Chart Widgets Functional Guide

Before you begin

- Verify that you have the appropriate designing security.

To design chart widgets

1. Click ☰ > ⊗ to open Design mode, and click the tab you want.

2. In the Tab Properties area, click ⠿ **Add Widget** or on a widget you want to change, click ⌄ to open the widget menu and click:

    - ⚙**Edit**: Opens the Designer and displays the widget settings. Change them, as needed.
    - ⧉**Copy**: Opens a screen that allows you to choose where to copy the widget to. Click ⚙**Edit** and change the widget settings, as needed.
    - ✕ **Delete**: Removes the widget.

3. Under **Reporting**, click **Chart**.

4. Select a widget Base. View the available Bases here

5. Click **OK**.

6. Select available columns by expanding one or more of the following options (if available) or search using the search field:

    - General Information
    - Dates
    - People
    - Hours/Units
    - Dollars
    - Accounts
    - Keys

7. In the **Chart Type** drop down, select one of the following chart types:

- Bar (*default*)
- Column
- Scatter
- Line
- Spline
- Area
- Area Spline
- Pie
- Donut
- Funnel
- Bubble

8. Click Add Formula to [add a formula column](#) to the widget.

9. Click **OK**.

10. Edit Grouping options.

   a. Click **Edit Grouping Options**.

   b. Click the columns you want to add grouping options on.

11. Set the Chart options (available options depend on chart type selected):

Chart Type	Chart options available
Bar	- Display $ Prefix - Stack Columns - Rotate Labels - Use Color Gradient - Legend Location - Number Format - Truncate Amount
Column	- Display $ Prefix - Stack Columns - Rotate Labels - Use Color Gradient - Legend Location - Number Format - Truncate Amount
Scatter	- Display $ Prefix - Rotate Labels - Use Color Gradient - Legend Location

	- Number Format - Truncate Amount
Line	- Display $ Prefix - Rotate Labels - Use Color Gradient - Legend Location - Number Format - Truncate Amount
Spline	- Display $ Prefix - Rotate Labels - Use Color Gradient - Legend Location - Number Format - Truncate Amount
Area	- Display $ Prefix - Rotate Labels - Use Color Gradient - Legend Location - Number Format - Truncate Amount
Area Spline	- Display $ Prefix - Rotate Labels - Use Color Gradient - Legend Location - Number Format - Truncate Amount
Pie	- Display $ Prefix - Display Pie as Percent - Use Color Gradient - Legend Location - Number Format - Truncate Amount
Donut	- Display $ Prefix - Display Donut as Percent - Use Color Gradient - Legend Location

	• Number Format • Truncate Amount • Start/End Angle • Center H/V % • Inner Size %
Funnel	• Display $ Prefix • Display Funnel as Percent • Use Color Gradient • Legend Location • Number Format • Truncate Amount
Bubble	• Display $ Prefix • Rotate Labels • Use Color Gradient • Display Labels • Legend Location • Number Format • Truncate Amount

12. *Donut widget only*. Select the following options:
    - **Start/End Angle**: Type a number or use the up/down arrows to define the size of the two halves of the donut. Entering -90 and 90 will display a semi-circle donut. Entering -180 and 180 will display a full circle.
    - **Center H/V %** - defines the position of the donut in the widget space.
    - **Inner Size %** - defines the size of the blank space of the donut hole/ thickness of the donut.
4. *Bubble chart only*: In the **Set as Bubble Axis** subsection of the column **Properties** section, select one of the following options to designate an X, Y, and Z:
    - None
    - Display as X-Axis
    - Display as Y-Axis
    - Display as Bubble Value (Z)

Note :	You need to designate a column to use as the X-Axis and a column to use as the Y-Axis for the bubble chart to render. The Bubble Value (Z) determines the size of the bubble.

5. *Bubble chart only*: Select the **Display in Tooltip** check box to display the column in the hoover tooltip.

Note:	This option is only available for columns designated as the X-Axis, Y-Axis, or Z.

6. To preview the widget, click the **Refresh** button next to Widget Preview.

7. Click 💾 to save changes.

Designing Revenue widgets

When you enable revenue methods, Ajera imports the Revenue Recognition tabs and corresponding widgets that are set up with everything you'll need to begin recognizing revenue immediately. The default Revenue Recognition tab is set up to allow assigned roles and employees to create, edit, and commit revenue sessions.

Ajera estimates your company's revenue based on the revenue methods you apply to projects, phases, and activities. Employees who are authorized to recognize revenue for your company use *revenue sessions* on the Revenue Recognition tabs to review, edit, and commit estimated revenue.

Before you begin

- Understand revenue recognition.
- Enable revenue methods. When you enable the Percent of Contract, Formula, or Formula + WIP methods, Ajera imports the Revenue Recognition tabs automatically.
- Verify that you have Full Designer security so that you can view and edit the Revenue Recognition tabs in Design mode.
- Assign your role to the Revenue Recognition tabs.

To design view-only Revenue Recognition tabs

Follow the steps below if you have employees who need visibility to the revenue tabs but cannot edit or commit the revenue amounts.

1. Click 🍔 > ⚙ to open Design mode, and click the **Revenue Recognition** tab.

2. On the Revenue widget, click ⌄ and select ⚙**Edit**.

3. Clear the **Task Options > Enable Create New** box.

4. Click 💾 to save your changes.

5. In **Tab Security**, click **Edit Security** to select those roles and individual employees who can only view the Revenue Recognition tab.

To design editable Revenue Recognition tabs

Follow the steps below to create revenue tabs for those employee who will review, edit, and commit revenue for your company.

Note:	The Revenue widget does not allow grouping.

1. Click 🍔 > ⚙ to open Design mode, and click the **Revenue Recognition** tab.

2. On the Revenue widget, click ⌄ and select ⚙**Edit**.

3. Verify that the **Hide Column** box is unchecked for the following columns:
   - Edit Button
   - Commit Button
   - Delete Button

4. To allow employees to create revenue sessions, check the **Task Options > Enable Create New** box.

5. Click 🖫 to save your changes and return to the **Revenue Recognition** tab Design mode. The **New** button now appears in the lower right-hand corner of the Revenue widget.

6. In **Tab Security**, click **Edit Security** to select those roles and individual employees who can access this tab.

7. On the Revenue widget, click **New** to create a new revenue session. Enter a description (such as the month and year), start and end dates, accounting date, and any notes. applicable to this specific revenue session.

8. Your revenue session appears in the Revenue widget. Do one of the following:

   - Click the widget link (highlighted in blue) in the **Description** column to access the Revenue page. Go to the next step to edit the Revenue Detail widget.
   - Click **Edit** to change the revenue session details.
   - Click **Delete** to remove the revenue session.

9. If you need to change the Revenue Detail widget, click ⌄ and select ⚙**Edit**.

   - You cannot group, filter, or sort columns.
   - You cannot set the top number of records on a Revenue widget.
   - To allow employees to edit the following columns on the **Revenue Detail** widget, click that column heading and check the **Can Edit** box:

      - Committed Revenue
      - Revenue Percent Complete
      - Notes

10. Click 🖫 to save your changes and return to the Revenue Detail tab Design mode.

11. In **Tab Security**, click **Edit Security** to select those roles and individual employees who can access this tab.

Designing Payroll Service Accruals Task Widgets

The Payroll Service Accruals task widget is an editable widget where you can enter beginning balances and adjust accruals. It will display the hours accrued and used for each employee for each accrual pay.

Note :	Alerts cannot be created on task widgets. To add an alert for payroll service accruals, create a reporting widget using the payroll service accruals base and add an alert on that widget.

Before you begin

- Verify you have the appropriate designing security.

To create a payroll service accruals task widget

1. Click ☰ > ✖ to open Design mode, and click the tab you want the payroll service accrual task widget to be on.

2. In the Tab Properties area, click ⊞ **Add Widget**.

3. Under **Widget type** > **Tasks**, select **Payroll Service Accruals**.

   The Manage Payroll Service Accruals widget is added to the current tab.

5. Navigate to the widget and set up security.

6. To allow employees to edit the following columns on the payroll service accrual widget, click ⬛ > ✖ to open Design mode and click that column heading and check the Can Edit box:

    - Available
    - Notes

7. See all columns available to add to the widget.

8. Click **Save**.

Examples of chart widgets

Select a chart type below to see some examples of different charts you can build in the widget designer.

Bar
Column
Scatter
Line
Area
Pie
Donut
Funnel
Bubble

Chart Type: Bar

Example of widget	Balances widget
Purpose	Show the balance left in different accounts.
Widget Base	Home
Columns used	- Cash - Payable Balance - Receivable Balance - WIP Balance

Filter/Sort/Group-up	None
What it would look like	

Chart Type: Column

Example of widget	Aging widget
Purpose	To see the aging of Payable, Receivable, and WIP Balance
Widget Base	Home
Columns used	- Payable Balance - Receivable Balance - WIP Balance
Filter/Sort/Group	Grouped by Date > Aging
What it would look like	

Chart Type: Scatter

Example of widget	Bank Account Balance for past 6 months
Purpose	To show the bank account balance for past 6 months
Widget base	Bank Account
Columns used	• Bank Balance
Filter/Sort/Group	Grouped by date past 6 months
What it would look like	

Bank Account Balance for past 6 months

Chart Type: Line

Example of widget	Trends
Purpose	To see the trend over past months for Payables, Receivable, WIP, and Cash
Widget base	Home
Columns used	• Cash • Payable Balance • Receivable Balance • WIP Balance
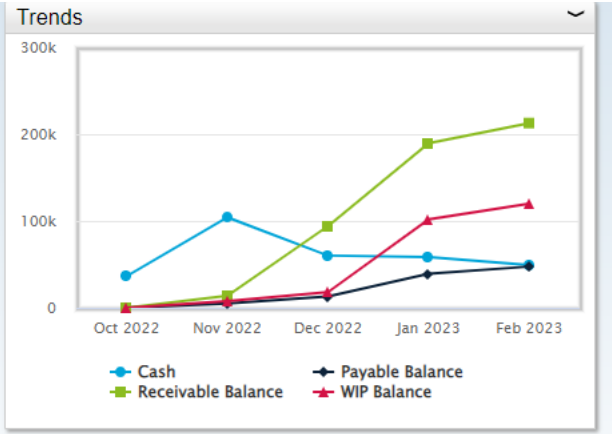
Filter/Sort/Group	Grouped by Date
What it would look like	

Chart Type: Area
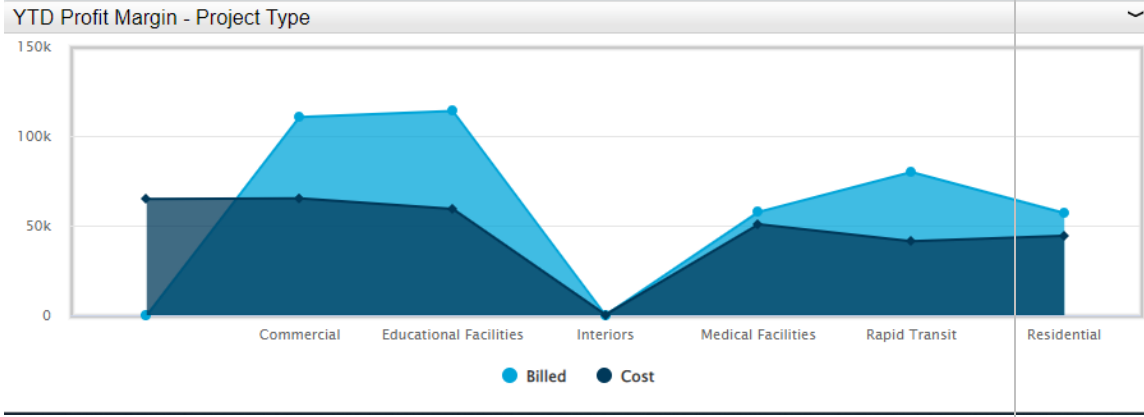
Example of widget	YTD Profit Margin – Project Type
Purpose	To compare profit Margin by Project Type
Widget base	Project Type
Columns used	• Billed • Cost • Project Type
Filter/Sort/Group	Grouped by Project Type
What it would look like	

Chart Type: Pie

Example of widget	Receivable Balance - Client Type
Purpose	To show the receivable balance by Client type
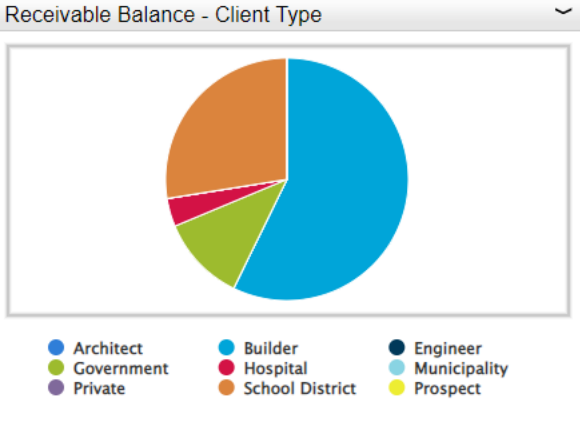
Widget base	Client Type
Columns used	• Receivable Balance • Description
Filter/Sort/Group	Grouped by Description
What it would look like	

Chart Type: Donut

A donut chart contains the same visual attributes as a pie chart with a hollow center. In the widget designer, chart options allow you to control:

- **Start/End Angle** which controls if the chart is displayed at 180, 360 or in between
- **Inner size** which determines the size of the thickness of the donut
- The placement of the donut in the chart area.
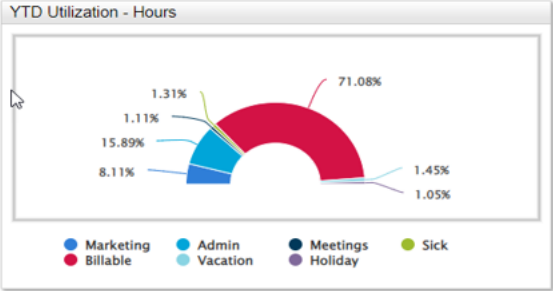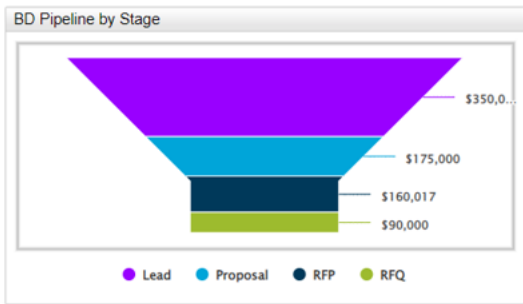
Example of widget	YTD Utilization - Hours
Purpose	To show the Year to date Utilization by description
Widget base	Transaction
Columns used	• Hours • Utilization Description
Filter/Sort/Group	Grouped by Utilization Description
What it would look like	

Chart Type: Funnel

A funnel chart is a graphical representation used to visualize how data moves through a process, for example a sales process. In a funnel chart, the dependent variable's value diminishes in the subsequent stages of the process. By viewing the subsequent stages of a process, readers can quickly identify bottlenecks.

Example of widget	BD Pipeline by Stage
Purpose	To see how things are moving through stage processes like BD Stage process
Columns used	• Current Stage • Contract Amount
Filter/Sort/Group	Grouped by Current Stage
What it would look like	

Chart Type: Bubble

Bubble charts tell a story visually between different data sets using three fields of data. Bubble charts are used when data needs a third dimension to provide richer information to viewers. Bubble charts are not ideal if you want to see exact values, if you want to plot more than two values on the x/y axis, if there are overlapping bubbles, or there are negative or zero values. Bubble charts also provide a way to visually identify outliers.

Note:	Links are disabled for bubble charts.

Example of widget	Compares Cost Against Billed + WIP and Profit %
Purpose	It makes it easy to see which departments have the highest Revenue and Cost, as well as identifying which ones have the highest profit percent. In this example, you can see that Portland Architecture has the highest Revenue & Cost and a smaller profit percent. While projects with smaller Revenue & Cost have larger profit percent.
Columns used	• Billed + WIP (as the X-Axis) • Cost (as the Y-Axis) • Profit % (as the Z. This determines the size of the bubble)

Filter/Sort/Group	Grouped by Department
What it would look like	Department Profit Health Compares Cost against Billed & WIP and Profit %

Designing quick reports

A *quick report* presents aggregate information from the Ajera database. You access it from the ☰ > **Reports** menu, not from a dashboard.

Before you begin

- Verify that you are set up with Designer security.

To design quick reports

1. From the ☰ > **Reports** menu, click **Quick Reports** > **Design Quick Reports**.
2. Follow the instructions for designing tabs. Each quick report appears as a tab.
3. Design Chart widgets, Table widgets, or Revenue widgets.
4. Assign roles and employees to tabs

   The quick report appears on the ☰ > **Reports** > **Quick Reports** menu for the roles and employees you select. They may need to click ⟳ to refresh their menu.

Gantt chart on widgets

Adding a Gantt chart to a table widget

To add a Gantt chart to a table widget

1. Click ☰ > ✖ to open Design mode, and click the tab you want.

2. In the Tab Properties area, click ⠿ **Add Widget** or on a widget you want to change, click ⌄ to open the widget menu and click ⚙**Edit**.

3. Under **Reporting**, click **Table**.

4. Select a widget Base. View the available Bases here
5. Click **OK**.
6. Click **Add Columns**.
7. Select **Gantt**.
8. Select Date columns to use as reference points.
9. Click OK.
10. Edit Gantt column properties.

Editing Gantt Column Properties

To edit the Gantt column properties

1. Click ⊜ > ⊗ to open Design mode, and click the tab you want.
2. In the Tab Properties area, click ⊞ **Add Widget** or on a widget you want to change, click ⌄ to open the widget menu and click ⚙**Edit**.
3. Select the Gantt column under **Edit Columns**.
4. Edit Gantt column properties:
    - Change the Heading
    - Change the color
    - Change the width of the Gantt
    - Change the Date Format of the Gantt
5. Select Date Reference Columns:
    - Select a date column to use as the Start Date
    - Select a date column to use as the End Date
6. Set conditional formatting.
7. On the **Link** tab, select an item from the drop down menu.
8. To preview the widget, click the **Refresh** button next to Widget Preview.
9. Click 💾 to save changes.

Changing the scale of a Gantt chart

By default, the Gantt chart shows the minimum start and max end date.

To change the scale on a Gantt chart

1. From the widget with the Gantt chart, drag the start and end to see a smaller date range.
2. To reset, click the refresh button ↻.

Adding a formula to a widget

If you want to display more specific information on your widgets, you can create your own column by defining a formula for it.
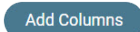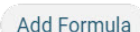
You can often write the formula you need by entering simple mathematical equations. However, to enter more complicated formulas, you must either understand how to use Microsoft SQL commands or request the services of an Ajera consultant (to learn more about Microsoft SQL, search the Microsoft website).

Video: Table widgets: formulas and formatting (4:38)

Before you begin

- Verify that you have the appropriate designing security.

To add a formula to a widget

1. Click ☰ > ✖ to open Design mode.

2. On a widget you want to add a formula to, click ⌄ to open the widget menu and click ⚙**Edit**.

3. Click Add Columns

4. Click Add Formula

   The Formula Builder opens.

Types of formulas that can be created

- **Basic formulas**: You can create formulas using basic mathematical operators. For example,

   [Total Contract Amount] - ([Billed] + [WIP])

- **Advanced formulas**: When you write an advanced formula, you create a new column by defining relationships between columns that already exist on the widget. To create advanced formulas, you do not need to know the structure of the Ajera database. To write advanced formulas, you use the Microsoft SQL functions. Some commonly used functions in advanced formulas include:

   - LEFT
   - RIGHT
   - SUBSTRING
   - DATEDIFF
   - DATEADD
   - MONTH
   - UPPERCASE
- Here is an example of a formula for the Transaction base.

Case [Activity Type]	WHEN 'Labor'	THEN [Employee]
	WHEN 'Expense'	THEN [Activity]
	WHEN 'Consultant'	THEN [Vendor]
	WHEN 'None'	THEN 'Invoice Adjustment'

   END

- This formula uses the SQL function, CASE, to populate the new column as follows:

If the activity type is	Then the formula returns
Labor	the employee
Expense	the activity
Consultant	the vendor
None	the text "Invoice Adjustment"

- **Advanced custom formulas**: You may choose to write an advanced custom formula when you need to create an entirely new column that is not based on a relationship between existing columns. To write advanced custom formulas, you must know the structure of the Ajera database and use Microsoft SQL functions. For up-to-date database schema information, refer to the AxSchema spreadsheet in your Ajera\Program folder. Some commonly used functions in advanced custom formulas include:
  - SELECT
  - FROM
  - WHERE
  - A good use of an advanced custom formula is when you want to display static columns from different widgets or tables within the database. For example, you want a column for the project manager's phone number on the project widget. You create a custom formula on the project widget referencing the phone number field from the Employee database table:
  - SELECT vecPhone1 FROM AxVec WHERE vecKey = [Project Manager Key]

Caution :	- If Ajera's database structure or logic changes, advanced custom formulas may cease to work correctly. These formulas may produce an error or return incorrect results without alerting you of any problems. For example, if you create an advanced custom formula that calculates an activity type total using the current activity types, and then a future version of Ajera's database includes new activity types, that formula then produces an inaccurate amount because it is calculated without the new activity types. - Be aware that multiple custom formulas on one base may cause performance issues.

- **Special Tags**:
  - HUB_KEY_TAG = "{HubKey}";
  - LINK_KEY_TAG = "{LinkKey}";
  - START_DATE_TAG = "{StartDate}";
  - END_DATE_TAG = "{EndDate}";
  - CURRENT_USER_TAG = "{CurrentUser}";
  - FROM_PARENT_TAG = "{FromParent}";

Key	Definition
HubKey	The current Page's primary key. **Example**: If you are creating a new widget on the Project page, the

		HubKey would be the Project key.
LinkKey		The ID for the tab that this widget is running on.
StartDate		The starting date calculated off of an assigned date range.
	Note:	Unless you assign a date range to this column this will be set to the Ajera default system minimum date.
EndDate		The ending date calculated off of an assigned date range.
	Note:	Unless you assign a date range to this column this will be set to the Ajera default system maximum date.
CurrentUser		The employee key for the end user using the widget.
FromParent		The parent key that a parent widget has provided. If this is not a child widget than this has no meaningful value.

- **Formula as a percent**: You may choose to have formulas show as a percent.
    1. In the Formula Builder window, check the Percent check box.
    2. Enter a numerator.
    3. Enter a denominator.
    4. Change the multiplier if needed. It defaults to 100.
- **Formulas referencing other formulas**: You may choose to have a formula reference an already existing formula:

    Example:

    § Formula A = [Billed] * 1.5

    § Formula B = [Formula A] / [Hours worked]

Setting conditional formatting

Set conditional formatting so that specific information stands out when it meets the condition you specify.

To set conditional formatting:

1. In the Tab Properties area, click ⠿ **Add Widget** or on a table widget you want to change, click ⌄ to open the widget menu and click ⚙**Edit**.
2. For the table, click **Edit Table Options**.
3. For a column, click on the column and set conditional formatting in the **Properties** box.

Conditional formatting options

- Click the **Foreground** box and select a color for the text.
- Click the **Background** box and select a color for the background.
- In the **Column** drop-down, select a column.
- In the **Apply to Level** drop-down, select a level to apply the conditional formatting (depends on the grouping applied).
- In the **Operator** field, select an operator, if available (depends on the column's data type):

- **>** (greater than)
- **>=** (greater than or equal to)
- **<** (less than)
- **<=** (less than or equal to)
- **<>** (not equal to)
- **Is One Of**
- **Is Not One Of**
- **Between**
- **Contains**

- In the last field, enter a value. The value you enter depends on the Base. For example, enter a number for an amount Base but select a date for a date Base.
  - If you want to delete the condition, click **X**.

Changing Column Properties on Chart Widgets

To change column properties on chart widgets

1. Click ⊜ > ⊗ to open Design mode, and click the tab you want.

2. In the Tab Properties area, click ⠿ **Add Widget** or on a chart widget you want to change, click ⌄ to open the widget menu and click ⚙**Edit**.

3. Click on a column.

4. Edit column properties:
   - Change the Heading
   - Change the color
   - Add group options including grouping by date
   - Change the chart type
   - [Choose to stack columns](#)
   - Change display options:

Display on 2nd Axis	Select to display the column data on a 2nd axis
Display as Plot Line	Select to display the column data as a plot line
Display by Period	Select to display the column data by period
Display Values on Graph	Select to display the column data values on the chart
Display Zero Amounts	Select to display zero amounts from the column data on the chart

5. Apply filters.

6. To preview the widget, click the **Refresh** button next to Widget Preview.

7. Click 💾 to save changes.

To add stacked columns

Stacking is only available for bar and column type widgets.

1. In the column properties box, click on the **Stack With** drop down menu.
2. Select **Edit Stacked List.**
3. Enter a name for the stacked column list.

Note:	You cannot rename a column. To change the name, you have to remove the list and add a new one.

4. Click **OK** to return to the Properties window.
5. To delete a stacked list, click the **X** next to the name.
6. To apply a stacked option to a column select the name from the **Stack With** list.

Widget Bases

Select a widget base to see the list of columns available.

[Activity](#)
[Alert](#)
[Bank Account](#)
[Bank Entry](#)
[Bank Statement](#)
[BD Phase](#)
[Billing Review History](#)
[Cash Forecast](#)
[Client](#)
[Client Invoice](#)
[Client Type](#)
[Company](#)
[Contact](#)
[Contact Type](#)
[Credit Card Import](#)
[Credit Card Import Detail](#)
[Credit Card Import Log](#)
[Department](#)
[Employee](#)
[Employee Type](#)
[Expense Allocation](#)
[Expense Report](#)
[GL Account](#)
[GL Entry](#)

Home

Import Settings

In-house Expense Log

Journal Entry

Journal Entry Detail

Marketing Stage

Paycheck

Paycheck Deduction

Paycheck Fringe

Paycheck Pay

Paycheck Tax

Payment

Payroll

Payroll Service Accruals

Phase

Project

Project Manager

Project Progress

Project Template

Project Type

Purchase Order

Purchase Order Detail

Receipt

Recurring Journal Entry

Recurring Vendor Invoice

Reported Percent Complete

Resource

Revenue

Revenue Detail

Session

Tabs

Timesheet

Transaction

Vendor

Vendor Insurance

Vendor Invoice

Vendor Type

Filtering information in a widget

Filtering limits the information that appears in a widget so that it displays only the data you need. You can filter by:

- Condition: Include or exclude information with a simple equation: *<variable>* + *<operator>* + *<value>*.
- Point in time or time period: Include or exclude information with a simple equation: *<operator>* + *<variable>* + *<value>*.
- Current User: Displays information that pertains only to the logged-in employee.
- Parent/child: Specific information appears in the child widget only when you select a record in the parent widget. Both must be on the same tab.
- If you want to filter on more than one item use a semi-colon (;) to separate the items.

  Example: On a project widget, to filter out items that are just project ID 1 and project ID 2, you would type ID1; ID2.

Note:	You can filter Revenue widgets but not Revenue Detail widgets.

Before you begin

- Verify that you have the appropriate designing security.

To filter a table widget

1. Click ⊜ > ⊗ to open Design mode, and click the tab you want.
2. For the widget you want, click ⌄ to open the widget menu and click ⚙**Edit** to open the Designer.

By condition

1. Click on a column
2. From the Filters drop down, select an operator, (options depend on the column's data type):
   - **>** (greater than)
   - **>=** (greater than or equal to)
   - **<** (less than)
   - **<=** (less than or equal to)
   - **<>** (not equal to)
   - **Is One Of** *(unavailable for date-specific filters)*
   - **Is Not One Of** *(unavailable for date-specific filters)*
   - **Between**
   - **Contains** *(unavailable for date-specific filters)*
3. In the next field, enter a value. The value you enter depends on the column. For example, enter a number for an amount column but select a date for a date column.
4. Use the next field to apply a filter to a grouped column. Your options will depend on the groups added to the widget.
5. If you want to delete the filter, click ✕ .

By a point in time or time period

1. Click a date column.
2. From the **Filters** fields, select an operator, if available (depends on the column).

- **>** (greater than)
- **>=** (greater than or equal to)
- **<** (less than)
- **<=** (less than or equal to)
- **<>** (not equal to)
- **Is One Of** *(unavailable for date-specific filters)*
- **Is Not One Of** *(unavailable for date-specific filters)*
- **Between**

Note:	For columns that are not date specific, an "and" statement is needed.

- **Contains** *(unavailable for date-specific filters)*

3. In the next field, select a point in time.
   - **Today:** Current date
   - **Specific Date:** A calendar appears. Select the date you want.
   - First date of the month of the current year (January through December)
   - Next day of the week (Monday through Sunday)

4. Select the amount of time before or after the point in time to include in the filter:
   - *A date in the future:* Click the **+** button or enter the positive number you want to include in the filter.
   - *A date in the past:* Click the **-** button or enter the negative number you want to include in the filter.

   The Designer displays the date to the right of the fields to guide you.

5. To filter by a time period, add another date. From the field beneath the first **Filters** field, select an operator and repeat these instructions.

6. If you want to delete a filter, click ✖ .

By Current User

1. In the Designer, do one of the following:
   - For a Chart widget: From the **Filters** field, select a Key that represents the employees in your firm.
   - For a Table widget: Add Column for a Key that represents employees in your firm. **For example**: Principal in Charge Key or Employee Key

2. From the **Filters** field for the new element or column, select **Current User**.

3. If you want to delete the filter, click ✖ .

By Current User's Department

1. In the Designer, add a Department Key column to the widget

2. From the **Filters** field for the new element or column, select **Current User's Department**.

By Current User's Company

1. In the Designer, add a Department Key:
   - For a Chart widget: From the **Filters** field, select **Company Key**.
   - For a Table widget: Scroll to the Keys section and click **Company Key**.

2. From the **Filters** field for the new element or column, select **Current User's Company**.

By parent/child

> **Note:** The parent and child widgets *must be on the same tab*. Therefore, if creating a parent/child filter in a Table widget, set the table height to Unlimited in Layout mode to ensure the parent and child remain on the same tab.

1. In the child widget, click the **Add New Element** button for a Chart widget or the **Add Column** button for a Table widget.
2. In the Designer, do one of the following:
   - For a Chart widget: From the **Filters** field, select **<parent Base> Key**.
   - For a Table widget: Scroll to the Keys section and click **<parent Base>**.
3. From the **Filters** field for the new element or column, select **From Parent**.
4. If you want to delete the filter, click ✖ .

Temporary filter, sort options, group options, and date ranges on widgets

In addition to filters, sort options, group options, and date ranges you can set while building a widget, you can also apply temporary filters, sorts, and groups while viewing table widget data to quickly search information on a widget to display just the information you need.

The type of filters depends on what kind of information is present in the widget.

To apply filter, sort, and group options

1. On your dashboard, click on the column description.

Filter options (Table widget only)

Filtering on the widgets searches for information.

If a filter is applied, you will see this symbol ▼ next to the column header. To remove the filter, refresh the dashboard or click the column header and choose **Clear**.

> **Note:** You cannot remove filters that were applied by the designer. For example, you cannot remove the filter that limits the table widget to show only your projects.

- **>** (greater than)
- **>=** (greater than or equal to)
- **<** (less than)
- **<=** (less than or equal to)
- **<>** (not equal to)
- **Is One Of** *(unavailable for date-specific filters)*
- **Is Not One Of** *(unavailable for date-specific filters)*
- **Between**
- **Contains** *(unavailable for date-specific filters)*

Date Range (Table widget only)

If a date range is applied, you will see a date range in the column header. To remove the date range, refresh the dashboard or click the column header and choose **Clear**.

If the designer applied a sort, you can apply a new sort that will temporarily override the existing sort.

- **Today:** Current date
- **Specific Date:** Click in the field and a calendar appears. Select the date you want.
- **Start of Time/End of Time**

Note :	If a date range was applied to the widget by the designer, the **Start of Time/End of Time** option will not be available.

- First date of the month of the current year (January through December)
- Next day of the week (Monday through Sunday)

Sort options (Table widget only)

If sort options are applied, you will see this symbol ↑ (ascending) or ↓ (descending) next to the column header.

- **Ascending**
- **Descending**

If a column is grouped, you have the ability to apply a temporary sort.

You can only have one temporary sort per widget. Any temporary sort applied to a widget will temporarily override sorts applied by the designer.

To remove the sort options, refresh the dashboard.

Group options (Table widget only)

To remove the group options, refresh the dashboard or click the column header and choose **Clear**.

- **Expanded**
- **Collapsed**
- **No Detail**

While in Edit mode, if any column on the widget has a group level filter or No Detail grouping applied, you will not be able to edit, remove, or add temporary grouping options.

As of Date (Table and Chart widgets)

As of Date allows you to change the date considered "today's date." Without using As of Date, the amounts in the software include all data entered regardless of time. This temporary filter allows you to choose a date in the past or future to tell the widget to display the data as if the date was this particular date. As of Date is available on columns that have a date range available. Review the widget base help to see which columns have a date range available.

When the As of Date filter is applied, **As of: [the date]** will display in the widget header.

To apply an As of Date filter:

- Click the ⌄ and select As of Date.
- In the date window, either select a date using the calendar or enter a date.

To remove the As of Date filter, refresh the dashboard.

Setting a date range in a widget

Set a date range to limit the information that appears in the entire widget to a specific time period.

These instructions apply to widgets that use a date Base. To filter a date element or column in relation to a point in time or by a time period, see [Filtering information in a widget](#).

> **Note:** All date options, except **Specific Date**, are *relational*, which means they automatically change in relation to today's date. As today's date changes, the date range automatically changes, too.
>
> **Specific Date** is a static date, and you must manually change it as today's date changes.

Before you begin

- [Verify with your manager that you are set up with the appropriate designing security.](#)

To set a date range in a widget

1. Select the **Date Range** check box. The **From** and **To** fields appear.
2. In the **From** field, select where to start the date range.
   - First date of the week, month, quarter, or beginning of time (Before you began using Ajera. This date is set far in the past to ensure that Ajera captures all the needed data. In the Ajera database, this date is 1/1/1900.)
3. If you want to change the From date by:
   - *Moving it forward:* Click the **+** button or enter the positive number you want to increment it by. Unavailable if you select the **Beginning of Time** option.
   - *Moving it backward:* Click the **-** button or enter the negative number you want to decrement it by. Unavailable if you select the **Beginning of Time** option.
   - *<Period>:* Select the period to move the From date forward or backward. Options include **Day**, **Week**, **Month**, **Quarter**, **Year**. Unavailable if you select the **Beginning of Time** option.
4. In the **To** field, select where to end the date range.
5. If you want to change the To date by:
   - *Moving it forward:* Click the **+** button or enter the positive number you want to increment it by. Unavailable if you select the **End of Time** option.
   - *Moving it backward:* Click the **-** button or enter the negative number you want to decrement it by. Unavailable if you select the **End of Time** option.
   - *<Period>:* Select the period to move the To date forward or backward. Options include **Day**, **Week**, **Month**, **Quarter**, **Year**. Unavailable if you select the **End of Time** option.
6. The Designer displays the date range to the right of the From and To fields to guide you.
7. If you want to delete the date range, clear the **Date Range** check box.

Copy a widget to a new page or tab

To copy a widget to a new page or tab

1. Click ☰ > ✕ to open Design mode.
2. On the widget you want to copy, click ⌄ and select ⧉ **Copy**.
3. On the new screen, choose the tab or page you want to copy the widget to and select **Copy Widget**.
   A message pops up indicating which widget was copied and where it was copied to.
4. Navigate to the widget you copied and verify the filters and security are set up the way you want.

Exporting widgets

Exporting a chart widget to PDF

To export a chart widget to PDF

1. On the widget you want to export to PDF, click ⌄ and select ![PDF icon] **Export PDF**.
   It opens in the same tab as Ajera. You will need to click the browser back arrow to return to Ajera.
2. If the download doesn't start automatically, click **Download**.
3. You can choose to Open the file or Save it.

The file name is auto-generated with the name of the chart widget and the date it was downloaded.

Exporting a table widget to Excel

To export a table widget to Excel

1. On the widget you want to export to Excel, click ⌄ and select ![Excel icon] **Export Excel**.
   It opens in the same tab as Ajera. You will need to click the browser back arrow to return to Ajera.
2. If the download doesn't start automatically, click **Download**.
3. You can choose to Open the file or Save it.

The file name is auto-generated with the name of the table widget and the date it was downloaded.

Exporting a table widget to PDF

You can choose to download a single page of a table widget or the entire table widget.

To export a single page of a table widget to PDF

1. On the widget you want to export to PDF, click ⌄ and select ![PDF icon]**Export PDF (page)**.
   It opens in the same tab as Ajera. You will need to click the browser back arrow to return to Ajera.
2. If the download doesn't start automatically, click **Download**.
3. You can choose to Open the file or Save it.

The file name is auto-generated with the name of the table widget and the date it was downloaded.

To export an entire table widget to PDF

1. On the widget you want to export to PDF, click ⌄ and select ![PDF icon]**Export PDF**.
   It opens in the same tab as Ajera. You will need to click the browser back arrow to return to Ajera.
2. If the download doesn't start automatically, click **Download**.
3. You can choose to Open the file or Save it.

The file name is auto-generated with the name of the table widget and the date it was downloaded.

Printing a widget

To print a widget

1. On the widget you want to print, click ⌄ and **Print**.

   A new tab in the browser opens.
2. On the browser dialogue that pops up, click **Print**.

Widget Designer icons

A list of the icons used in the widget designer and the meaning.

Icon	Meaning
	A date range is applied
↓	A descending sort is applied
▼	A filter is applied
	A formula is applied
⊞	Grouping is applied
🔗	A link is applied
✎	Conditional formatting is applied.
↑	An ascending sort is applied
✍	Indicates a column can be edited in the widget

Working with layout

Changing tab layout

To ensure your dashboards convey information effectively, size and position your widgets using the Layout mode. Click and drag widgets to the right size and the right place using the layout grid for guidance.

Video: Edit Dashboard layout (1:34)

Before you begin

- Verify that you have the appropriate designing security.

To change tab layout

1. Click ⊜ > ⊗ to open Design mode, if needed.
2. Click the tab you want to change.
3. In the Tab Properties area, click ⯗ **Edit Layout** to open Layout mode. The following icons appear in the grid:
    - ⯗ - Chart widget
    - ⯗ - Table or Revenue widget
3. To enable scrolling on a widget, select **Enable Scrolling**.
4. To move a widget, place the cursor over the widget. When a four-headed arrow appears, drag the widget to a new location.
5. To resize a widget, you can:
    - Place the cursor on the edge of the widget. When a two-headed arrow appears, drag the edge to increase or decrease the size.
    - For Table widgets, you can click **Height:** to change the table height to Unlimited. A height of *Unlimited* means the height can increase to a maximum of 500 rows for a desktop device and 100 rows for a mobile device.
    - For table widgets, you can click **Width** to change the table width to Unlimited.
      When Unlimited is selected for the width, the widget will dynamically expand based on the information displayed in the widget.
6. To freeze the widget heading, ensure the **Enable Scroll** option is selected and **Widget Height** is set to Unlimited.
7. When finished, click one of the following to:
    - 💾 Save your changes and return to Design mode.
    - ← Discard your changes and return to Design mode.

Viewing dashboard information

To view dashboard information:

Click a relevant tab at the top of the dashboard and do any of the following to:

- Return to the previous page within Ajera, click ←
  Note: If you click your browser's Back button, it returns you to the previous webpage in your browser not your previous Ajera page.

- Return to the Home page, click ⊜ > 🏠 .
- Access the main menu, click ⊜
- Refresh your dashboard information and Ajera menu, click ↻.
  Note: If you click your browser's refresh button, it reloads Ajera and resets your page. This takes more time than the Ajera refresh.

To view chart information

Click tab at the top of the dashboard and do any of the following:

- View more details: Click a linked shape in a chart to go to the related tab.
- Hide a shape in a chart: Click the variable for that shape in the legend. To display it, click the variable again.
- View related information in a child widget that is blank: Click a shape in the parent widget. The child widget populates with information related to the selected shape.

To view table information

Click a tab at the top of the dashboard and do any of the following:

- Print: Click the **Print** button in your browser or press **Ctrl+P** on your keyboard.
  Your browser determines the quality of your printout.
- Drill down for more details: Click the blue text, which indicates that your Ajera Administrator created a link to another tab.
- See the full list of information: Click More... .
- View more than the first 500 results (if available): Click the **1-500** button at the bottom of the table. This button changes to **501-1,000**, **1,001-1,500**, and so on, as needed.
- Expand or collapse information: Click ⸬ or ▬.
- View related information in a child widget - which is blank - click a row in the parent widget. The child widget populates with information related to the selected row.
- Filter, sort, and/or group on columns.
- Search a text column by keyword: Click the column heading, enter the keyword, and click **Search**. All matching results appear in the table. More details

Note:	• The search is not case-sensitive.
	• You cannot search for a blank field.
	• You can search only one column at a time.
	• Clicking ↻ removes any search you applied.
	• The percentage character (**%**) is the wild card character. For example, searching by **ZZ%-A** on the Project ID column could return ZZ-A, ZZ1247-A, and ZZ-12/27/2012-A.
	• If the keyword includes the percentage (**%**), underscore (**_**), or left bracket (**[**) character, enclose the character in brackets. For example, enter **25[%]** for 25%, **pat[_]hill@accutera.com** for pat_hill@accutera.com, and **Accutera-[[]Oakland Heights]** for Accutera-[Oakland Heights].
	• You cannot search on the Revenue or Revenue Detail widgets.

Working with Alerts

About Alerts

You can set up dashboard widgets to send alerts to employees automatically whenever a specific situation occurs. You can create recurring alerts, set conditions that trigger alerts, and send alerts to specific employees.

For example, you can set up alerts to notify managers when their projects are approaching budget. Or, set up recurring alerts to remind certain employees to submit their timesheets.

Video: Take a tour of Alerts (6:06 min)

How it works in Ajera

Once you have set up the alert email settings, you can set up alerts on table widgets. Any time a condition on the alert is triggered, whether it is a specific time of day or something has changed on the widget, Ajera sends an alert to those employees set up to receive those alerts.

Alerts are only available for table widgets.

When you turn on alerts, Ajera imports the following four tabs:

- Administrator Alerts
- Employee Alerts
- Project Manager Alerts
- Principal Alerts

You can also add a widget gallery dashboard called **Alert and Alert Detail** to help manage your alerts, see the last time an alert ran successfully, and get more information when an alert fails.

Below are four examples of alerts you can set up on widgets:

Alert Examples	Settings	What Ajera does
Vendor Insurance	**Description**: Vendor insurance expiring within 30 days **Frequency**: Daily, 10am **Trigger**: On New Row	Alerts an administrator when vendor insurance is ready to expire. Ajera regularly checks data and sends email whenever it encounters changes that match the trigger conditions set on the alert.
Timesheets	**Description**: Missing timesheet last week **Frequency**: Weekly, 10am, Monday **Trigger**: On New Row	Alerts an employee they forget to submit a timesheet for the previous week. Ajera regularly checks data and sends email whenever it encounters changes that match the trigger conditions set on the alert.
Project Budget	**Description**: Projects within 10% of budget **Frequency**: Daily 10am	Alerts a project manager that a project is within 10% of it's budget. Ajera regularly checks data and sends email whenever it encounters changes that match the trigger conditions set

	Trigger: On New Row	on the alert.
Billing Review	**Description**: An invoice is ready for review **Frequency**: Every 2 Hours **Trigger**: On New Row	Alerts a principal that an invoice is ready to be reviewed. Ajera regularly checks data and sends email whenever it encounters changes that match the trigger conditions set on the alert.

Click each step below to learn more about the process:
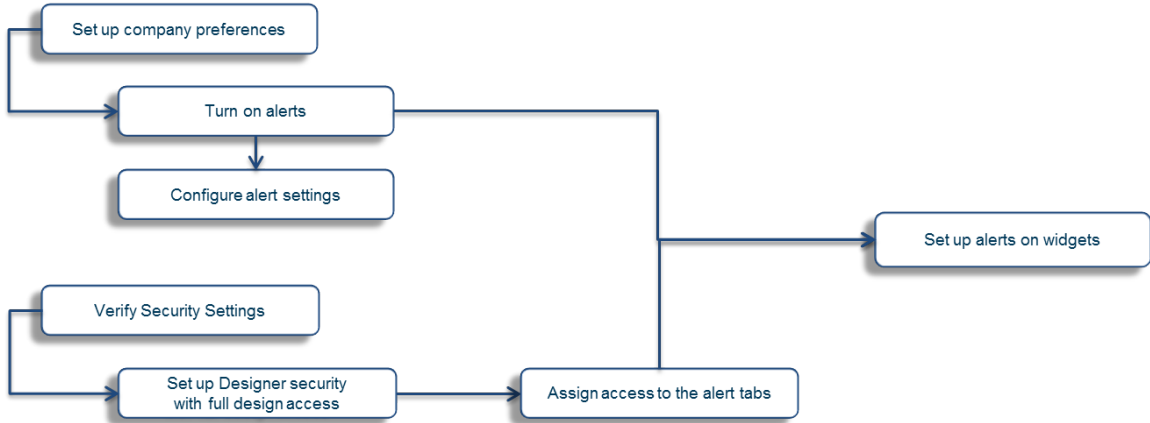
Configure Alert Settings

Before you begin

- [Set up Designer security](#) with full design access
- [Assign access](#) to the alerts tabs

Turn on alerts

1. From the ☰ > **Setup** menu, click **Company** > **Preferences**.
2. Click the **Alert Email Settings** tab.
3. Check **Alerts Active** to turn alerts on.

Configure Alert settings

Note :	Not all options are applicable for all email services. SMTP server and port are required fields. Work with your IT team to set up the email service for your company.

1. After alerts are turned on, enter the following information:

SaaS only	The only required fields for SaaS clients are **Sender's name** and **Sender's address**. The rest of the information is populated for you.

Sender's name	The name of the person the email should look like it is coming from
Sender's address	The email address of the person the emails will be coming from
SMTP server	The address of your SMTP server
Port	The port number set up on the email server
Authentication	If the server requires authentication, check the box and enter the username and password
SSL	Check if your server uses SSL for security

After the information is entered, click **Test** to ensure the information is correct.

Note:	If Alerts aren't sending because the Ajera Service is not running, you can restart the Ajera Service. From the server where Ajera is installed, go to the Windows Start menu, and click **All Programs > Ajera > Ajera Server Administration > Tasks > Ajera Service > Reregister**.

2. Click **Save**.

Setting up alerts

Before you begin

- Set up Designer security with full design access
- Assign access to the alerts tabs

Set up alerts on a widget

1. Click ⬛ > ✖ to open Design mode.

2. On the relevant widget, click ⌄ and select 🔔 **Alert**.

3. Fill out the following information:

   - **Description** - Name of the alert
   - **Notes** - Text box for notes, similar to other areas of Ajera
   - **Subject** - The text that displays on the subject line of the alert email
   - **Header** - The text that displays in the top half of the email that will not be repeated
   - **Formatting for each row** - This area is used as a template for how to display each row of the resulting alert
   - **Footer** - The text that will appear in the bottom half of the email that will not be repeated.

Below are a list of tags that are available to format emails. The tags will pull the corresponding information from your data and send the data in the alert.

   - [Recipient Name]
   - [Recipient First Name]
   - [Recipient Middle Name]
   - [Recipient Last Name]
   - [Page Name]

- [Tag Name]
- [Widget Name]
- [Alert Description]
- [Trigger]
- [Trigger Base]
- [Trigger Predicate]
- [Trigger Value]
- [Link to Tab]
- [Row Header] - This instructs the text formatter to place a header row in the email for every column, including hidden columns, on a widget.
- [Row Data] - This instructs the text formatter to place a row from every column on a line. If used outside of the **Format Each Row** section, only the first row of the data table will be used.
- Individual Columns

Example :	If you have three timesheets on a timesheet alert and want the date, number of hours, and project for each of them, your formatting for each row field might look like this:
	[Timesheet Date] [Hours] [Project ID & Description]

4. Set the frequency of how often Ajera should run this alert. Options include:
   - **Every Ten Minutes**
   - **Every X Hours**
   - **Daily** - If selected, select a time of day
   - **Weekly** - If selected, select time of day & day of week
   - **Monthly** - If selected, select time of day & day of month

Note :	An alert is going to be triggered based on the last time an alert finished and the frequency set on the alert. This means if you have the alert set to every 10 minutes, the alert will trigger 10 minutes after the previous alert ran. That usually means there is at least 1 minute added between the last time the alert started and the next time.

5. Set the trigger by selecting a condition for Ajera to check against. Options include:
   - **Always**: No conditions are set. When the alert is ran, an email is sent.
   - **Always, when content**: An alert is sent out if there are results when the alert is run.
   - **On New Row**: An alert is sent out when a new row of data is detected.
   - **An individual column on the widget**: Additionally you can specify a single column on a widget to run the alert on.

     For example: You can set a condition on an employee timesheet widget to send an alert when an employee's timesheet reaches more than 20 hours.

Note :	To handle complex conditions, create a hidden formula widget and place the condition on that hidden column.

6. If needed, edit the alert recipients by clicking **Edit Recipients**.

Note :	The alert recipient list differs from the Tab security list. If you clear the alert recipient list, Ajera reverts back to the settings on the Tab security.
	An employee must have an email address added in the employee setup to receive Alerts.

7. Click 🖫 to save the alert and return to the dashboard.

Changing an alert on a Widget

To change an alert on a widget

1. Click ☰ > ⊗ to open Design mode.
2. On the relevant widget, click ⌄ and select 🔔 **Alert**.
3. Click on the alert you want to change and make any changes.
4. To test your changes, click **Test**.

Note:	This will ignore the frequency settings and send an alert immediately. The Alert will only be sent to you.

5. Click 🖫 to save your changes to the alert and return to the dashboard.

Deleting an alert on a Widget

To delete an alert on a widget

1. Click ☰ > ⊗ to open Design mode.
2. On the relevant widget, click ⌄ and select 🔔 **Alert**.
3. Click the **Delete** button
4. Click **Delete** again to confirm the delete.

Activating/Deactivating an Alert on a Widget

To activate or deactivate an alert on a widget

1. Click ☰ > ⊗ to open Design mode.
2. On the relevant widget, click ⌄ and select 🔔 **Alert**.
3. Select the alert you would like to activate or deactivate.
   - To activate, check the **Active** box
   - To deactivate, clear the **Active** box
4. Click 🖫 to save the alert and return to the dashboard.

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