

DocMinder® User Guide

Dashboard

Version 56XX

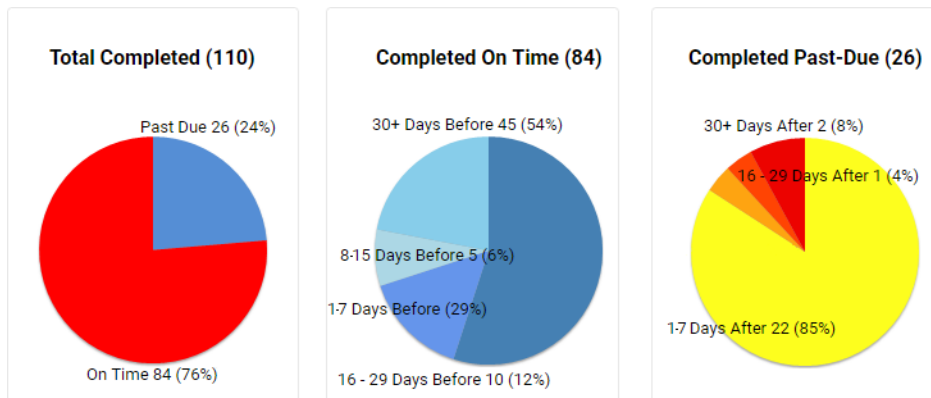
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Dashboard

With Dashboard, your data is summarized in pie-chart and bar-graph visualizations to provide you with at a glance awareness of your current task and project performance.

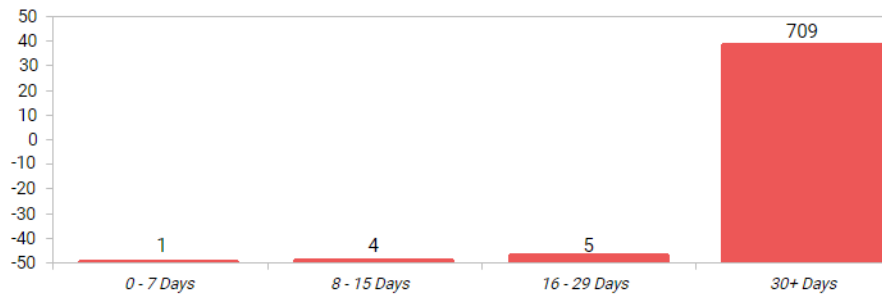
Visual dashboards simplify complex data into manageable, digestible chunks of information.



Displays (%) by status (e.g., past-due, completed and pending) for all tasks you're assigned to. Each pie-chart slice is a clickable region that links to the dashboard report.

Pending Past Due

Pending Past-Due displays tasks that are incomplete and past-due.

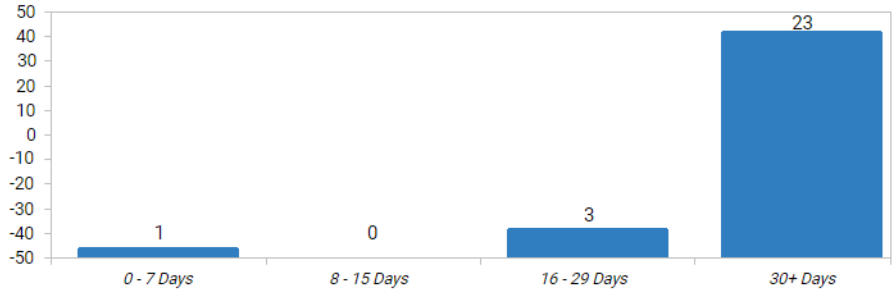


Pending Past-Due:

Tasks that are incomplete after the assigned due-date has passed.

Pending Coming Due

Pending Coming Due displays tasks that are incomplete with an approaching due-date.

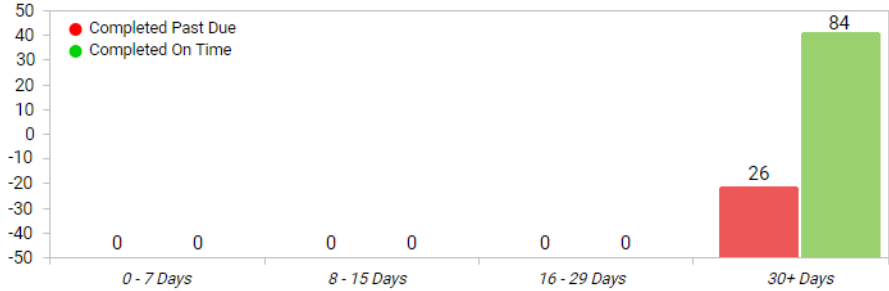


Pending Coming-Due:

Tasks that are incomplete and have an approaching due-date.

Completed Past Due

Complete Past Due displays tasks that have been completed after the due-date.



Completed Past-Due:

Tasks that have been completed after the assigned due-date has passed.

Dashboard View (Filters)

See the current status of your tasks and projects as well as longer term trends in a visual dashboard created from your data.

Filter your dashboard by a specific **Start / End Date**; click the **Start Date** date.

Report


Start Date: 01/01/2018


End Date:  /30/2018

Default Template ▾

The top-panel will display options to view your dashboard by date range, period or time-span.

Select a Date Range

Start Date: 1/1/2018 

End Date: 9/30/2018 

Due Date

Period

Next

Current

Previous

Time Span

Week

Month

Year

Quarter

Report

Default Template ▾

Update Cancel

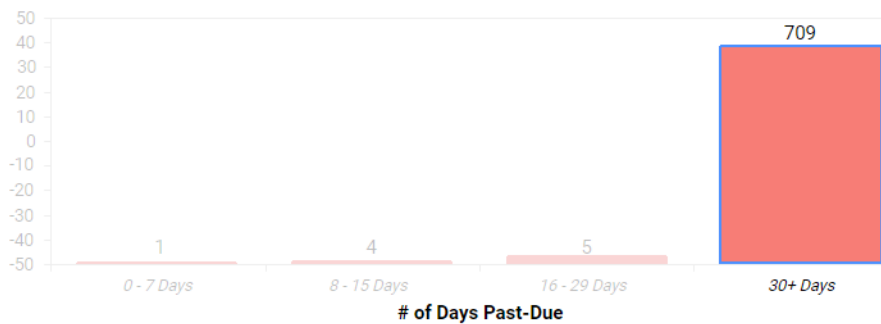
| Filter Type | Description |
|---------------------|--|
| Select a Date Range | Date range allows you to pick a Start Date and End Date to filter your view. |
| Period | Choose Next , Current or Previous to filter your view by Period . |
| Time Span | Choose Week , Month , Year or Quarter to filter your view by Time Span . |
| Report | Finally, click Update to save your dashboard view. You can also select a dashboard template view from the dropdown and save to another dashboard view. |

Dashboard Report

Dashboard reports are customizable so that you can build to quickly view performance data. Your dashboard report displays the most up-to-date (e.g., past due, completed, pending, etc.) information about your tasks and projects.

View Dashboard Report

To access the dashboard report; click on a Pie-Chart or Bar-Chart division.



A blue border appears around the clicked division.

All tasks and projects for the selected division are displayed in a report.

| ID | Subject | To | Completed | Due Date | Review |
|-------|---|------------------|-----------|-----------|--------|
| 51603 | ABC Bolt Contract | Bob Smith | | 1/2/2018 | Review |
| 68706 | Self-Certification Review Meeting | Christina Thomas | | 1/2/2018 | |
| 68707 | ACME Capital | Christina Thomas | | 1/2/2018 | |
| 68708 | OCC Examination Procedures | Christina Thomas | | 1/2/2018 | |
| 17484 | ABC Lease Agreement | Christina Thomas | | 1/3/2018 | |
| 68667 | Conflict of Interest Request | Christina Thomas | | 1/4/2018 | |
| 67814 | Markup and Approve Master Terms | Jack Peters | | 1/11/2018 | |
| 68815 | Insurance Agreement | Colby Craig | | 1/16/2018 | |
| 68652 | DocuSign Signatures - Enter Obligations | Brandon Williams | | 2/5/2018 | |
| 67823 | ACME Real Estate | Jack Peters | | 2/7/2018 | |
| 68152 | Contract Edit & Approval | Jack Peters | | 2/8/2018 | |
| 68156 | Approve Allied Agreement | Devin Hughey | | 2/11/2018 | |
| 69237 | ACME Joint Venture Agreement | Colby Craig | | 2/15/2018 | |

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Dashboard Review Panel

Select an item from your dashboard report and click the **Review** button to open up the panel.

| ID | Subject | To | Completed | Due Date | Review |
|-------|-----------------------------------|------------------|-----------|----------|--------|
| 51603 | ABC Bolt Contract | Bob Smith | | 1/2/2018 | Review |
| 68706 | Self-Certification Review Meeting | Christina Thomas | | 1/2/2018 | |
| 68707 | ACME Capital | Christina Thomas | | 1/2/2018 | |
| 68708 | OCC Examination Procedures | Christina Thomas | | 1/2/2018 | |
| 17484 | ABC Lease Agreement | Christina Thomas | | 1/3/2018 | |