

# Dashboard

✓Administrator License included



Better  
access to  
business  
knowledge  
means



better  
decision  
making.

*Have you ever felt that you made the wrong decision not because your reaction was wrong but because you were reacting to the wrong information?*

A dashboard gives you a clear, visual view of the health of your business (or selected parts of the business) at a glance. The SpruceWare.NET dashboard comes with a wide selection of pre configured indicators that you can tweak to meet your own needs: pick the ones you want and put them on your default dashboard and you will have an instant view of the most important metrics clarifying your thinking. Deploy it across your team and you have a great way to keep your newest managers

focused while giving all your managers the information they need to make quick, appropriate decisions. The SpruceWare.NET Dashboard, based on the power of iDashboards, gives you features that work overtime so you don't have to:

**Usability** The SpruceWare.NET Dashboard comes with a user library full of ready-to-use charts customized to the needs of SpruceWare.NET users—fire it up and start using it immediately.

**Relevance** Know *instantly* when something needs to be addressed, instead of waiting for reports and finger-pointing.

**Simplicity** Grasping the meaning of complex data has never been easier.

**Drill down** Link charts for drill-down and view the data making up a chart any time.

**Trend Analysis** Track Key Performance Indicators (KPIs) over time.

**Security** Restrict access to those who need it.

**Management by exception** Configure alerts to let you know only when something isn't right.

**Customizability** Need more than the great charts already there? Customize existing charts or make new ones.



*Instantly take your company's pulse*

## How it works

On all SpruceWare.NET systems, normal system activity gets organized and stored in various SQL database tables by the SpruceWare.NET software. All of this stored information is available to the SpruceWare.NET Dashboard.

Spruce has predefined a series of **charts** and queries pertinent to our customers for the dashboard. Once you are set up with an Analyst or Admin license (see “Licensing” below), you can go beyond these predefined charts and queries by modifying them to suit your needs or by creating your own new ones.

A **dashboard** usually pulls together multiple charts and queries for a big picture summary specifically suited to an individual's needs. With appropriate licensing, you can use existing professionally defined dashboards or set up your own. Save as many as you would like and revisit them with a click.

If you're looking at your dashboard and you would like to look more closely at a specific chart, you can do so by right-clicking on that chart and choosing “Maximize.”

Charts and queries can be defined with specific drill-down links, as are many of the Spruce designed charts; double-click in appropriate areas to see more detail in this case. In addition, you can always right-click and select “Chart Data” to see the exact numbers a chart is reporting on; click on the Excel icon to export to Excel.

## Licensing

The single Admin license that is now included with new SpruceWare.NET installations allows one person complete access to all options in the dashboard application. Other licenses can be purchased for additional users. Here's what the licenses allow:

- **Viewer:** Allows the user to access existing Spruce defined and Admin / Analyst defined dashboards, assuming they have been given security access to the category.
- **User:** Viewer privileges plus the ability to create and modify static data charts and dashboards.
- **Analyst:** User privileges plus the ability to work with real-time data queries and the ability to link charts for drill-down purposes. For a person to change or create charts that use SpruceWare.NET data, they need at least this licensing level.
- **Admin:** Analyst privileges plus the ability to perform security and administrative functions.

## Roll up your sleeves, if you want to.

Select from a wide range of viewing options for your data, mixing and matching to achieve your ideal views of the business. Customize these with colors and make them your own by defining break points, warnings, crisis alerts, animation, mouse-over values, labels, grids, ranges and drill-down functions. Add your own charts, choosing from multiple display options including bar, column, line, combo, metrics, pie, speedometer, tabular, bubble, mapped and custom charts.

## A typical dashboard scene

Your Tulsa store manager, already signed into the Spruce system, clicks on the SpruceWare.NET Dashboard menu option and is automatically logged in. He selects his favorite dashboard, which combines:

1. A bar chart showing sales by salesperson
2. A customer scorecard (highlights areas of concern from the selected salesperson's largest customers, based on sales volume, margins, average sale and A/R status)
3. A speedometer-style comparison of actual sales vs. goals for the selected salesperson
4. Sales vs. Returns for the store's top 50 customers



He wonders about a spike in the returns graph for one of his larger customers, and he hovers over that bar to reveal the customer, sales amount and returns amount for the period:



Further concerned, he clicks on the bar to view detail:

Dollars	Item	qty	invoice
-2635.00	112410	-1.0000	550312
-2635.00	112410	-1.0000	550432

It looks like someone entered at least one duplicate return. He verifies this in the Spruce document trail, then discusses it with Hal, the account salesperson. Hal backs out the invoice in one step and the credit is applied to the backout so the customer won't get a statement showing an open credit. Bigger problems averted!