TapRooT®

Changing the Way The World Solves Problems

System Improvements, Inc.
238 South Peters Road, Suite 301
Knoxville, Tennessee 37923 USA
Phone: 865-539-2139 Fax: 865-539-4335
e-mail: info@taproot.com
web: www.taproot.com

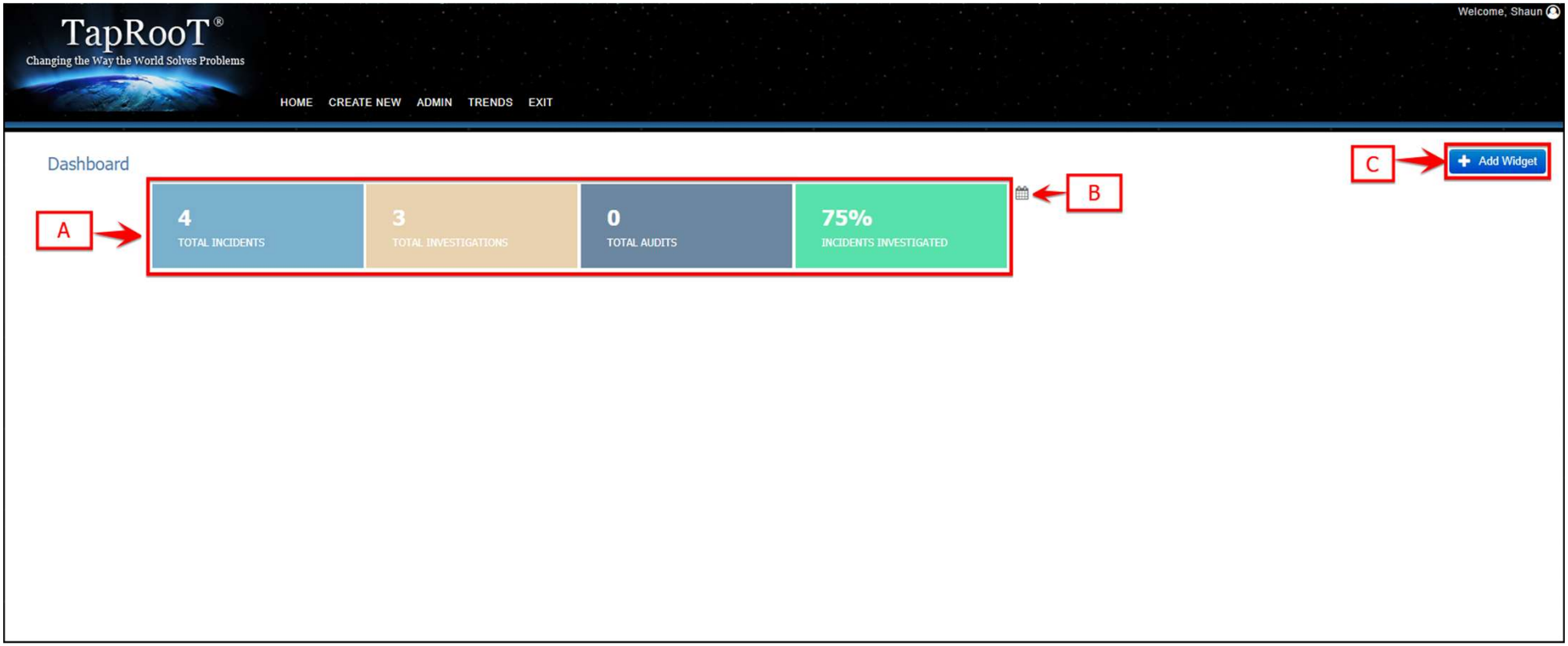
© Copyright 2016 by System Improvements ,Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

The latest release of TapRooT® VI introduces enhancements to the dashboard feature. These enhancements include the ability to drag and drop your dashboard widgets, apply filters to individual widgets and the ability to open individual widgets into their own full size window.

© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

- Lets start by taking a look at the dashboard before any widgets are added to it. As you can see from the screen shot I have labeled the different sections by letters A – C.

© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

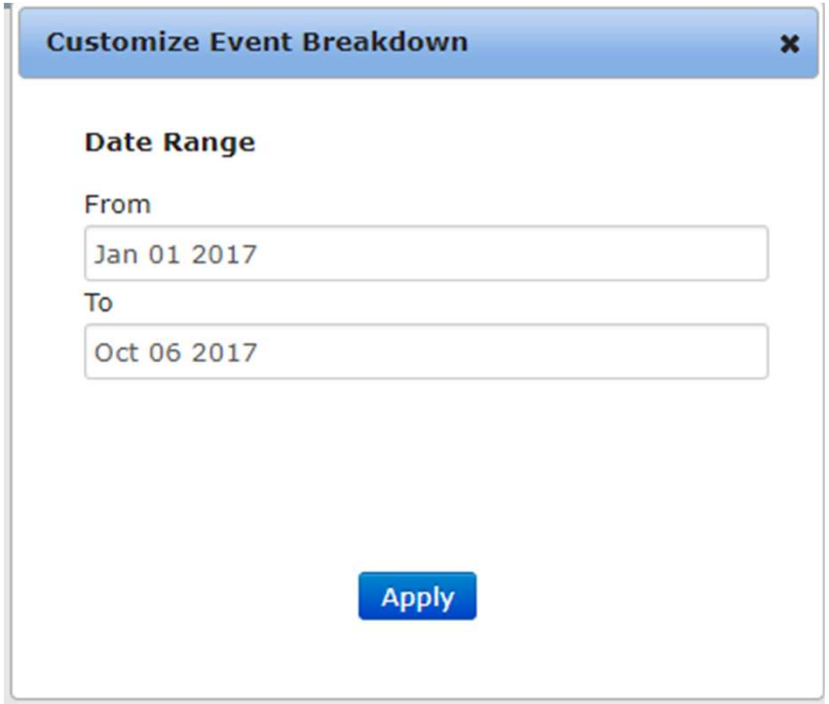
Section A: is where you will see the number of Total Incidents, Total Investigations, Total Audits and Total Incidents Investigated within a specified date range.

Section B: is the customizable Event Breakdown. You can choose a date range and it will give you the total of each category listed above. Once a different range is applied these totals will change.

Section C: is where you will modify the custom widgets. In this section you can create a filter for your widget by location, classification, widget type, date range & chart type.

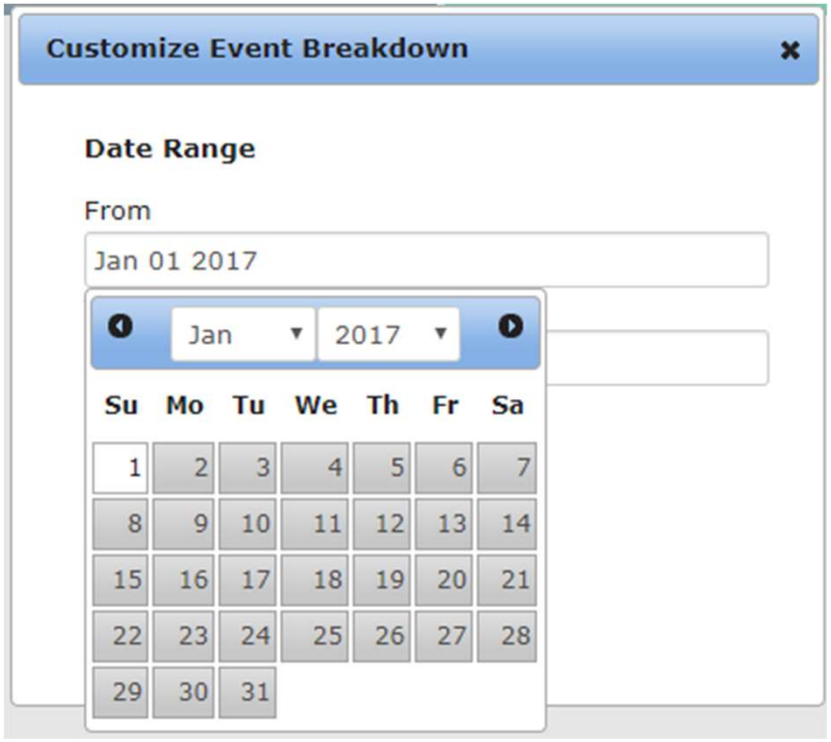
© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

This is the Customize Event Breakdown menu you will see when selecting the icon on on on the dashboard. This is were you can choose a specific date range to see the totals of your Incidents, Investigations, Audits & Incidents Investigated on the Dashboard.



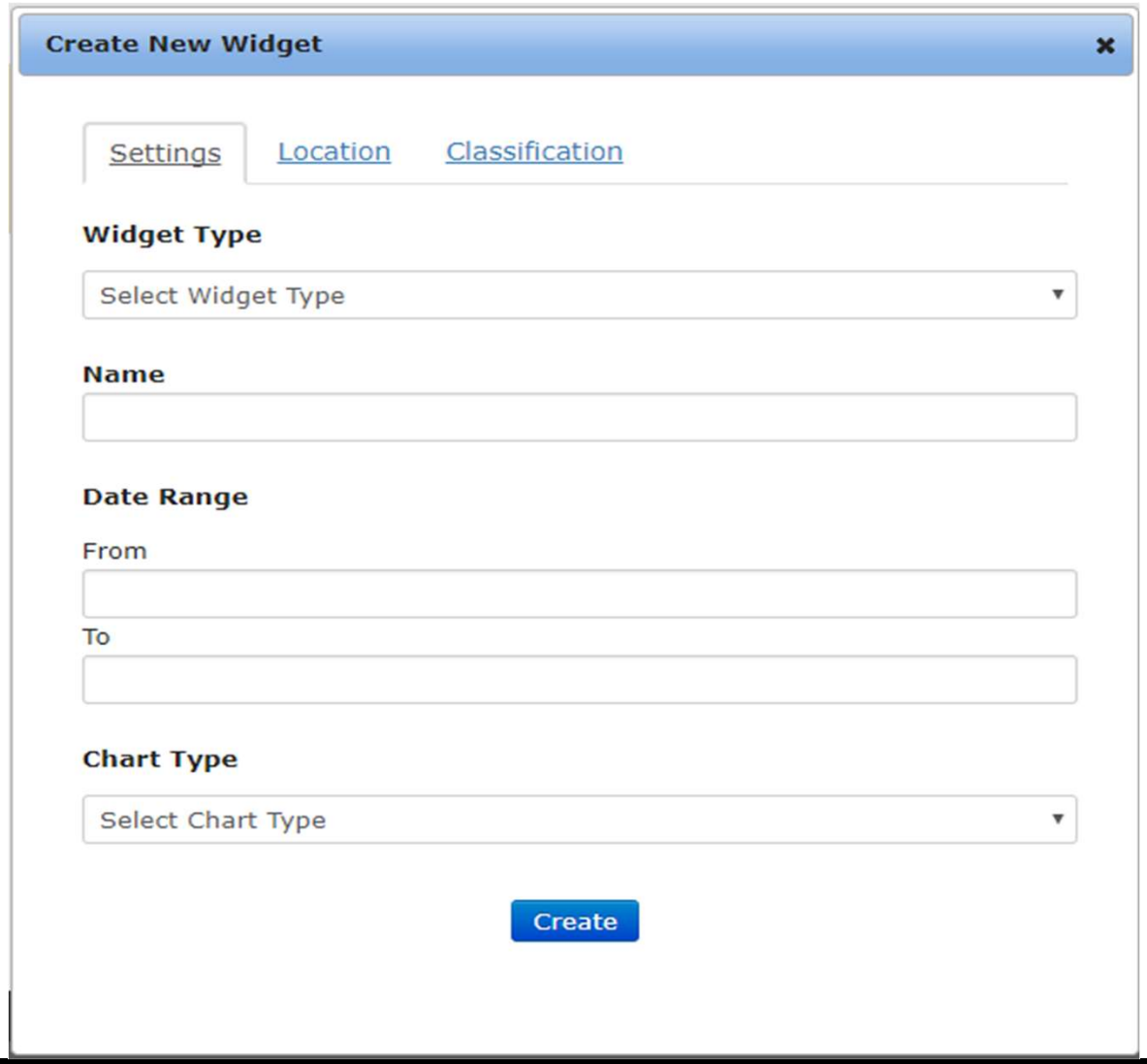
© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

As you can see, when you select both the **From** and **To** fields, a drop down calendar will appear for you to select a specific date range and year.



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

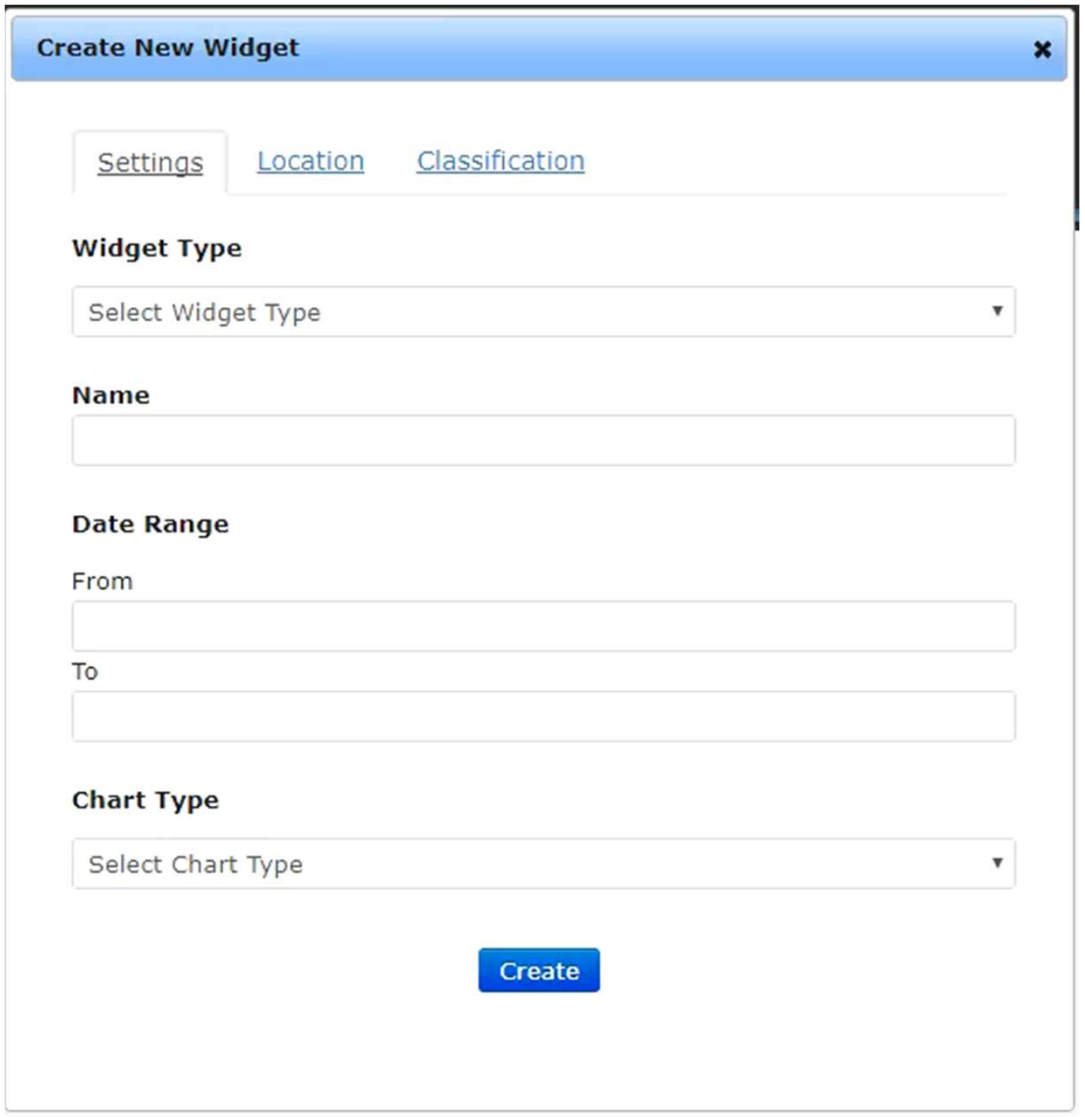
- Now let's take a look at the Add Widget section of the dashboard. Click on the icon to open the **Create New Widget** window.



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

The Create New Widget window will open by default on the Settings tab.

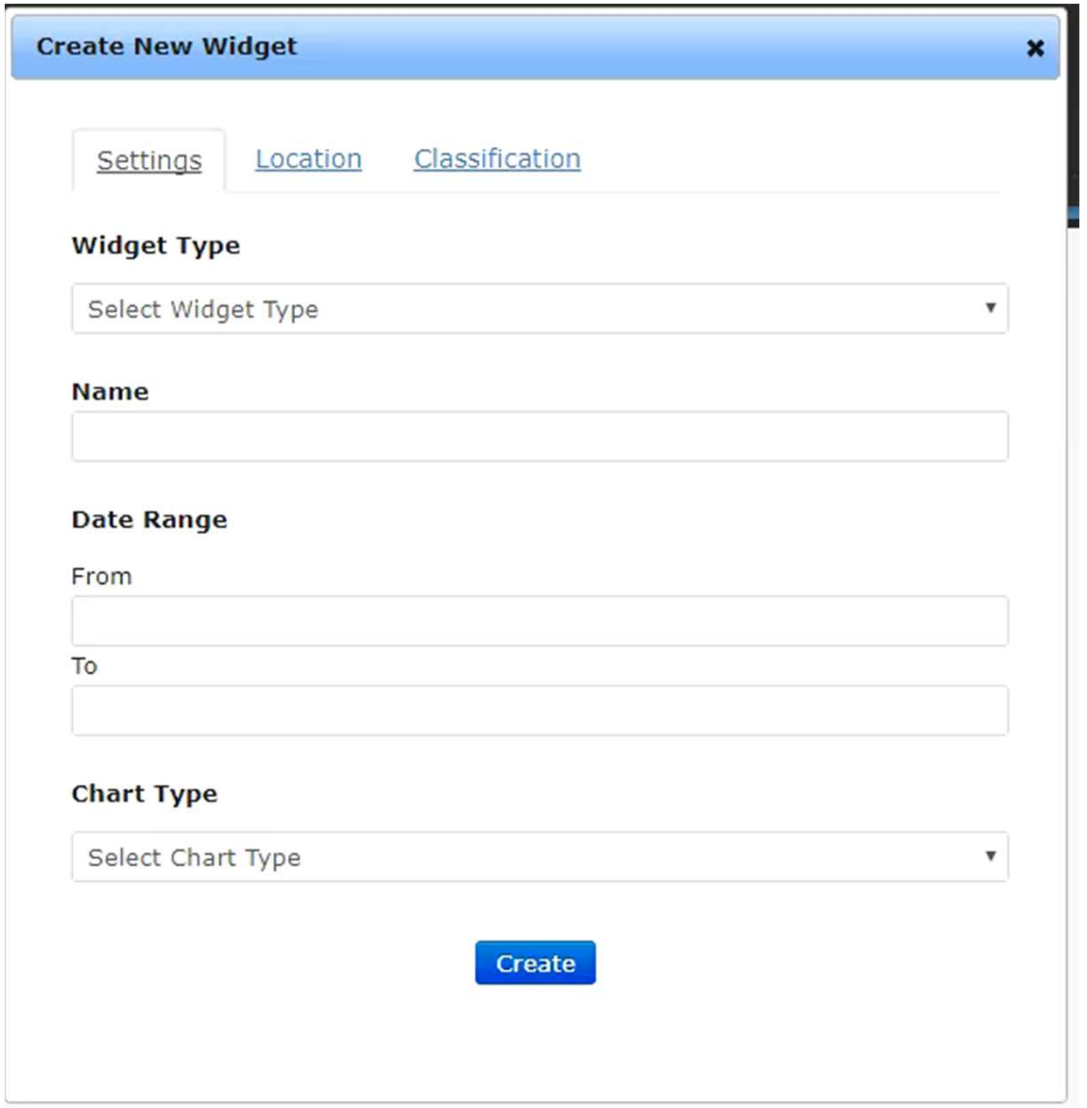
- Users can select multiple Widget Types.
- This will display specific information categorized by Audits, Corrective Actions, Incidents, or Investigations.
- The user can choose more granular options from this list as well. Such as, Audits by classification, location, month, quarter or year. The same goes for all the other categories as well.



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

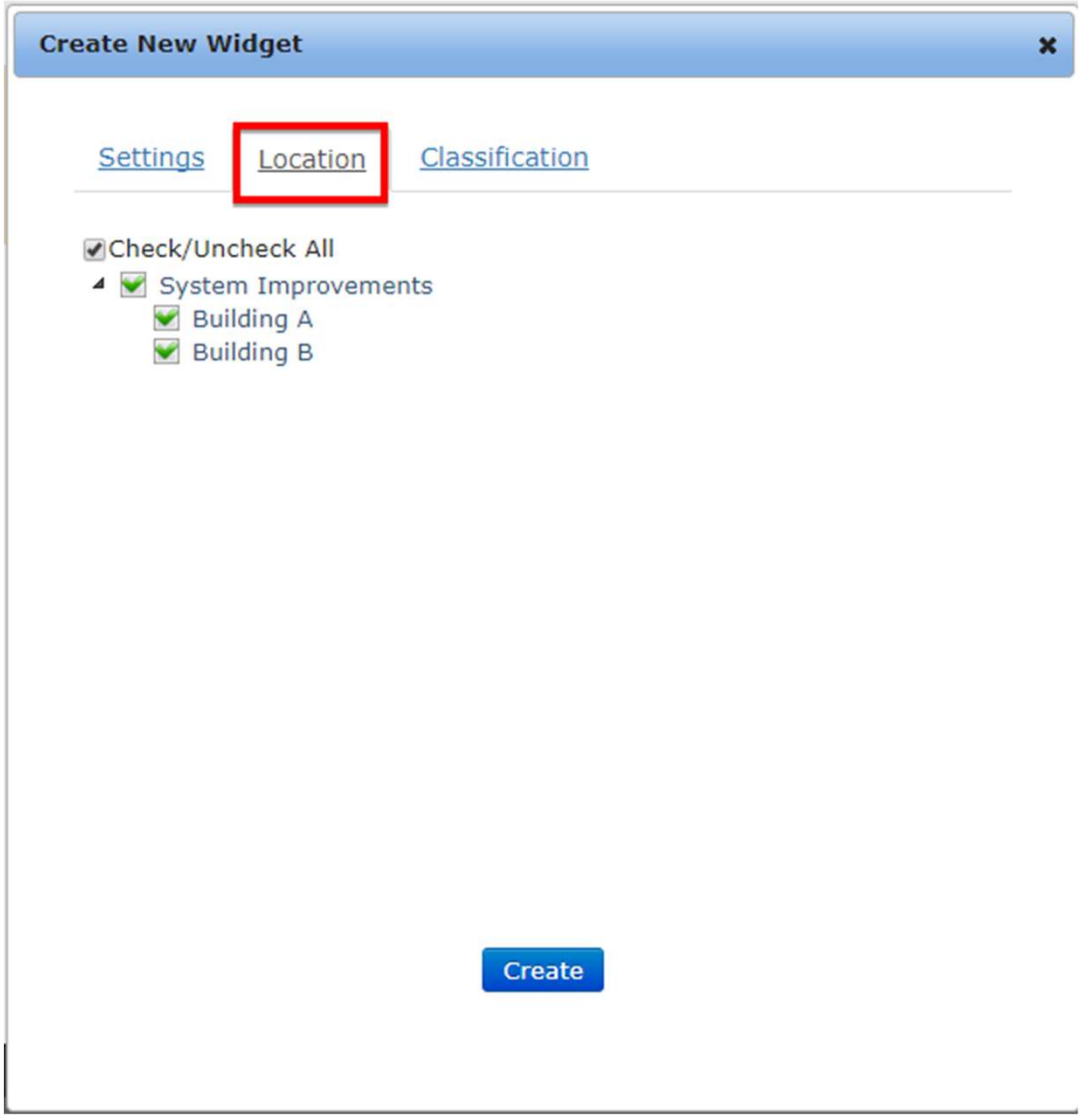
They **Chart Type** field is where the user selects how to display the information. The Chart field includes:

- Bar chart
- Horizonal Bar chart
- Pie chart
- Line chart
- Table chart
- Pareto chart.



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

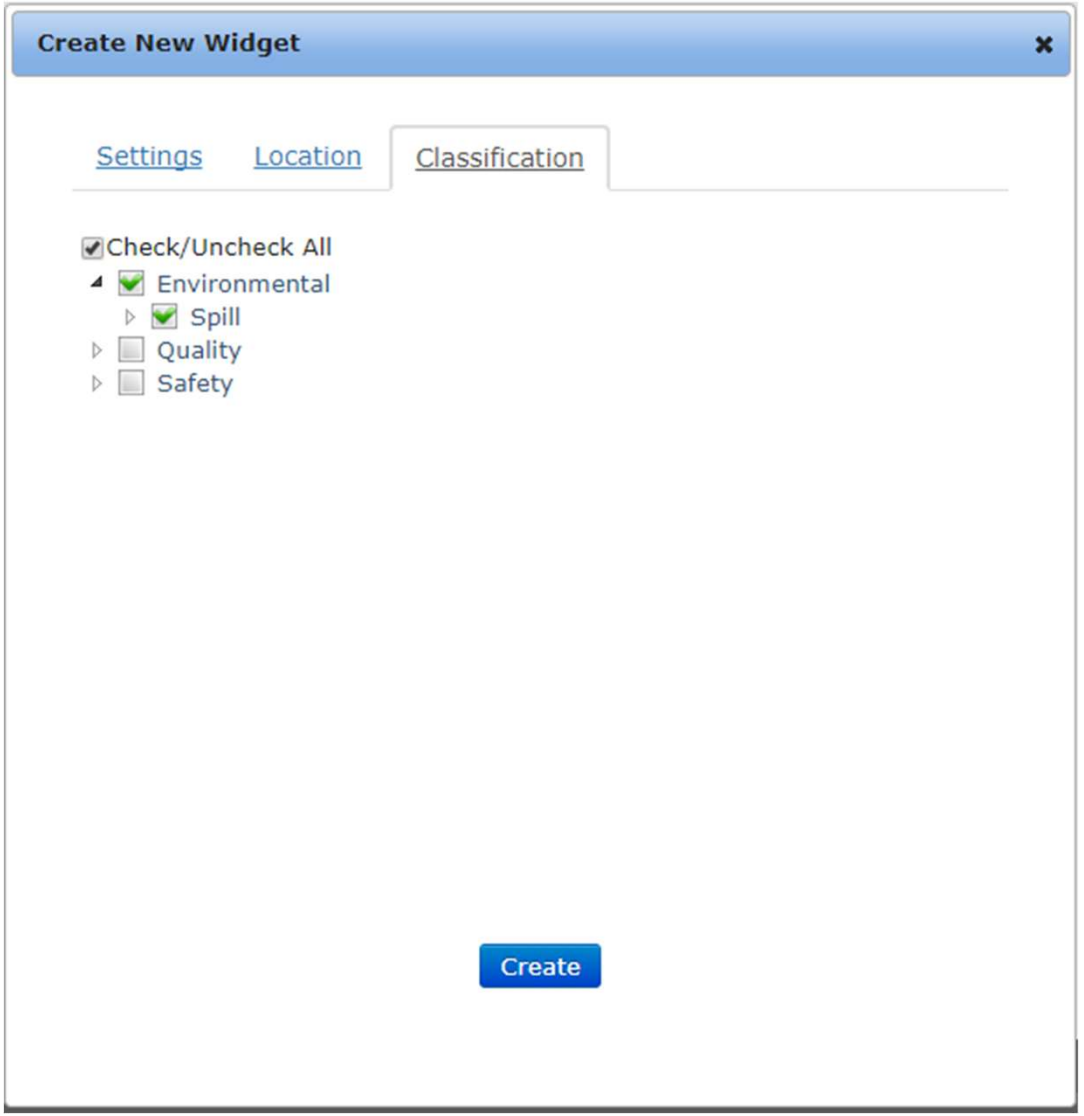
When the Location tab is selected, the user can choose from different locations or all locations they wish to see specifically. As you can see, the user can check or un-check the locations they have listed in their software.



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

From the Classification tab, the user can check or uncheck the fields they wish to pull data from.

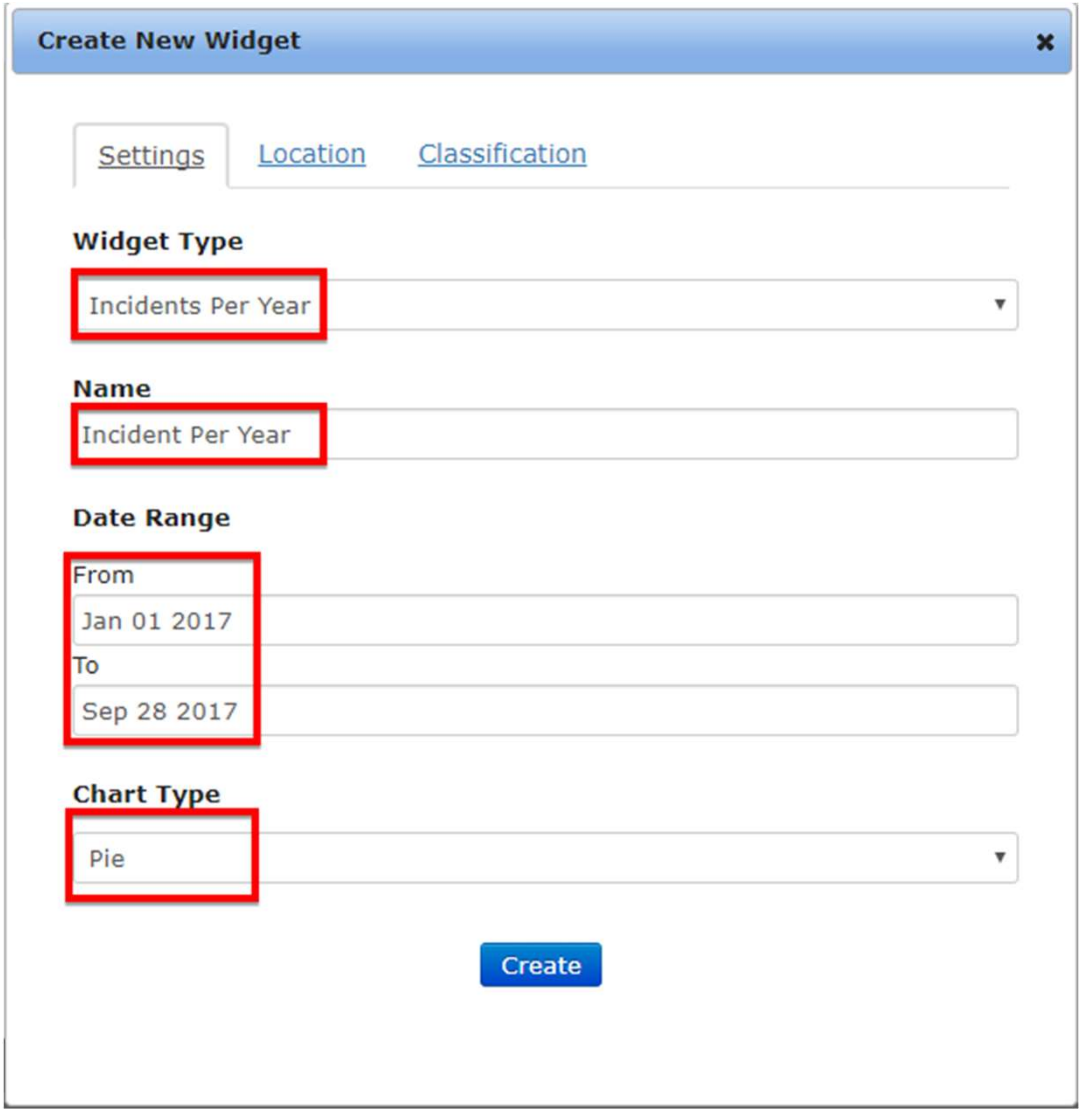
Choosing Environmental and spill will only show investigation data from this specific category.



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

Now that the basics have been covered, lets create an example **Widget**.

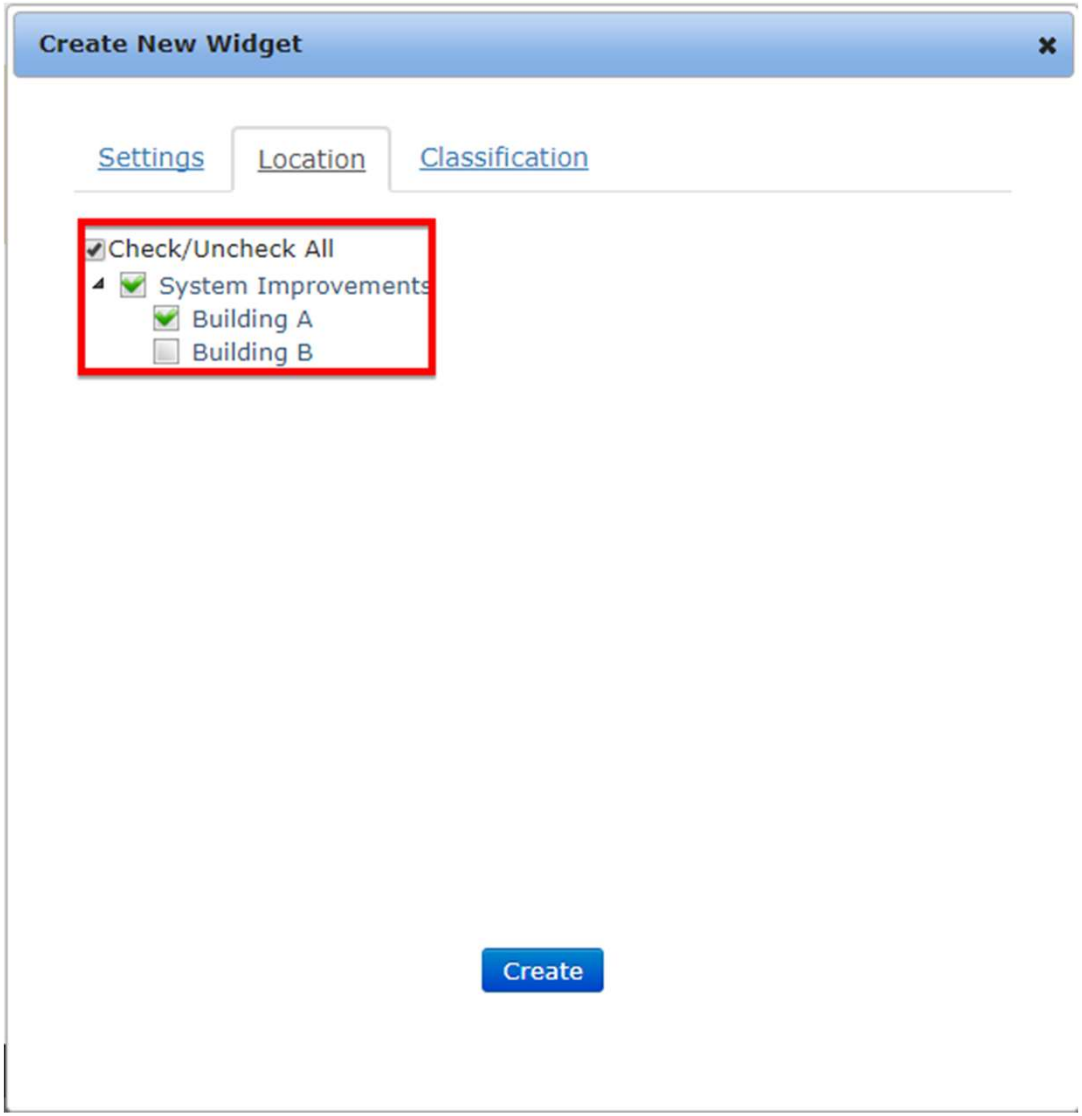
- First, we need to choose Widget Type: **Incidents Per Year**
- Next, give the chart a name and date range: **Incident Per Year** and we would like to see how many have been investigated from **Jan 01, 2017 to Sep 28,2017.**
- Finally, choose a Chart Type**:**
  Pie Chart



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

Now, choose a location:

- System Improvements Inc.
- Building A

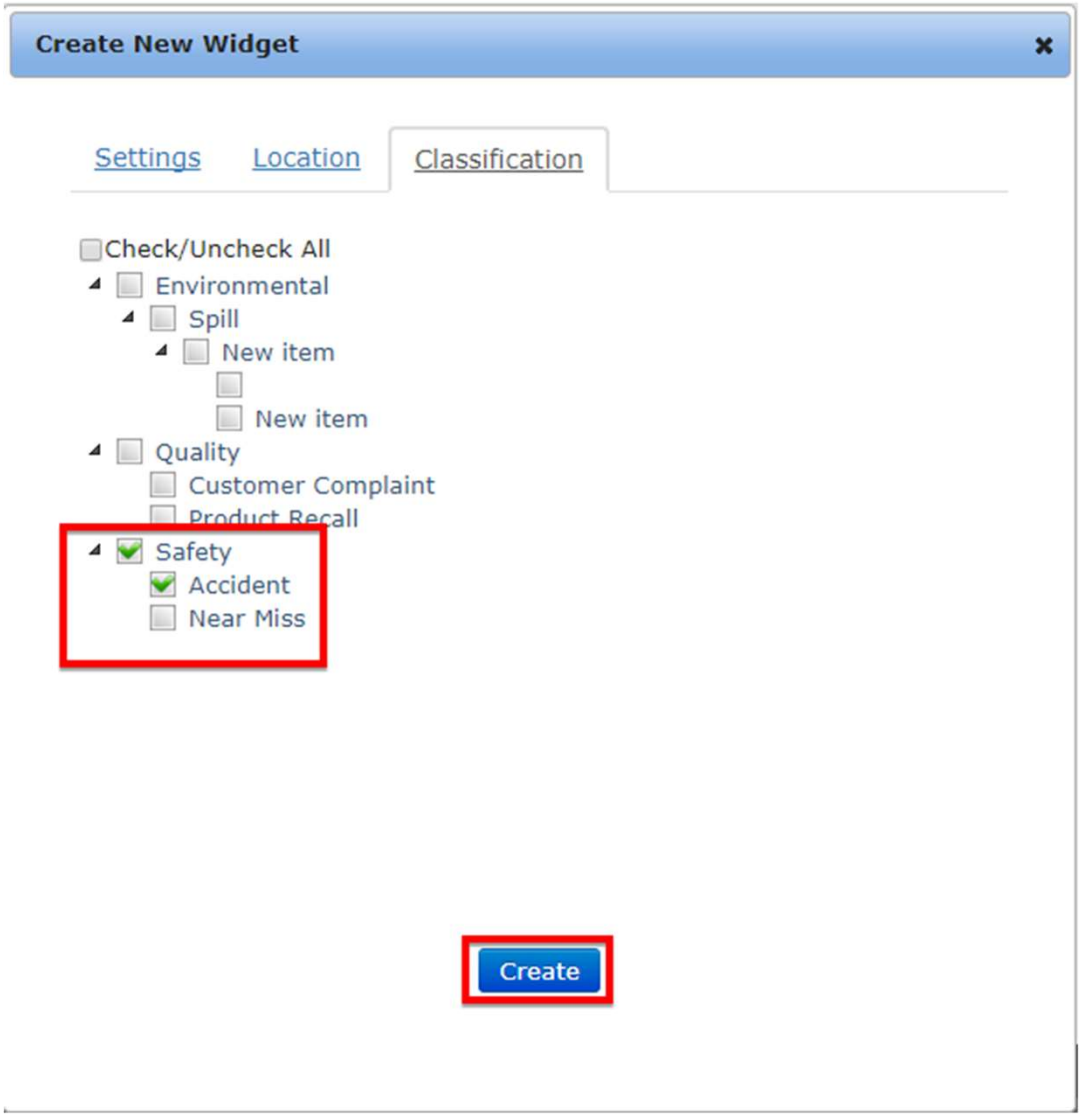


© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

Finally, choose a Classification:

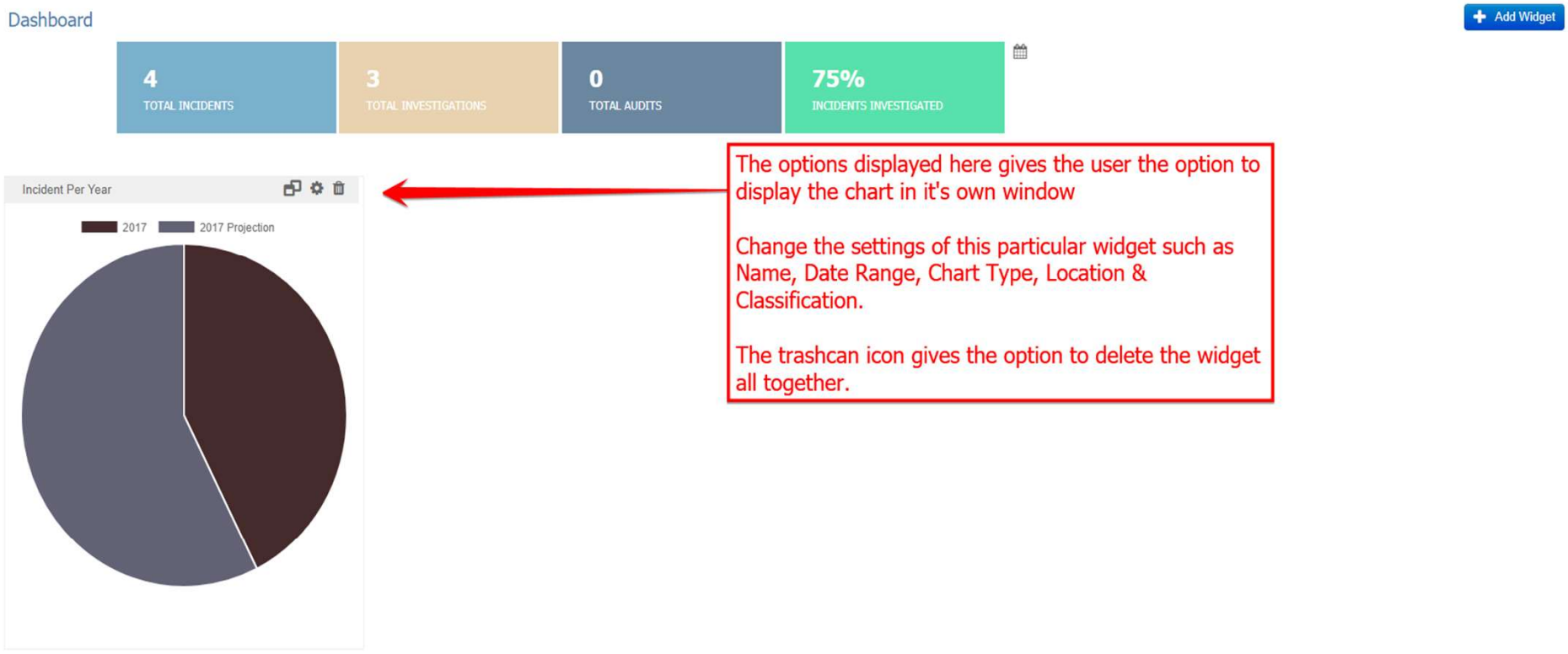
- Safety
- Accident

After the Classifications have been selected select **Create.**



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

Now we have our final product. As you can see the chart displays the specific information selected during the settings.



© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.

User Questions?

Give us a call 011 (865) 539-2139

Problems?

TapRooT® Technical Support

011 (865) 357-0080

support@taproot.com

© Copyright 2016 by System Improvements , Inc., Knoxville, TN. All Rights Reserved Worldwide. Duplication Prohibited.