



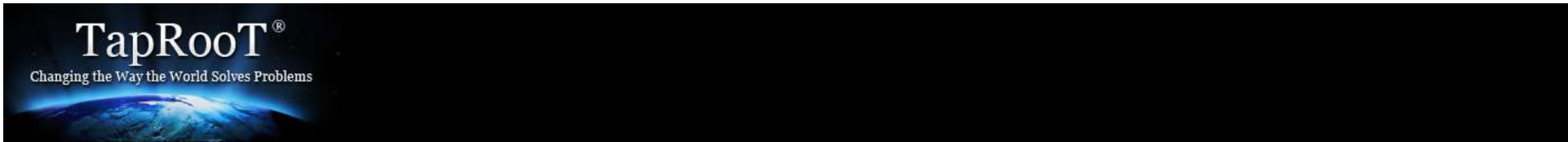
TapRoot®

Changing the Way The World Solves Problems

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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.

- 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.



TapRoot®
Changing the Way the World Solves Problems

Welcome, Shaun

HOME CREATE NEW ADMIN TRENDS EXIT

Dashboard

A →

4 TOTAL INCIDENTS	3 TOTAL INVESTIGATIONS	0 TOTAL AUDITS	75% INCIDENTS INVESTIGATED
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B ←

C → **+ Add Widget**

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.

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.

Customize Event Breakdown ✕

Date Range

From

Jan 01 2017

To

Oct 06 2017

Apply

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.

The screenshot shows a dialog box titled "Customize Event Breakdown" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Date Range". Below this label, there is a "From" field containing the text "Jan 01 2017". Below the "From" field, there is a calendar widget. The calendar widget has a header with a left arrow, a dropdown menu showing "Jan", a dropdown menu showing "2017", and a right arrow. Below the header, there is a grid of days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and a grid of dates (1 through 31). The date "1" is highlighted in the first row, first column.

- 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.

+ Add Widget

Create New Widget

Settings

Location

Classification

Widget Type

Select Widget Type

Name

Date Range

From

To

Chart Type

Select Chart Type

Create

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.

Create New Widget

Settings

Location

Classification

Widget Type

Select Widget Type

Name

Date Range

From

To

Chart Type

Select Chart Type

Create

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

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

Create New Widget ✕

[Settings](#) [Location](#) [Classification](#)

Widget Type

Select Widget Type ▼

Name

Date Range

From

To

Chart Type

Select Chart Type ▼

Create

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.

Create New Widget ✕

[Settings](#) **Location** [Classification](#)

☒ Check/Uncheck All

- ☒ System Improvements
 - ☒ Building A
 - ☒ Building B

Create

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.

Create New Widget

[Settings](#)
[Location](#)
[Classification](#)

☒ Check/Uncheck All

- ☒ Environmental
 - ☒ Spill
- ☐ Quality
- ☐ Safety

Create

Now that the basics have been covered, let's 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**

Create New Widget

[Settings](#) [Location](#) [Classification](#)

Widget Type

Incidents Per Year

Name

Incident Per Year

Date Range

From
Jan 01 2017
To
Sep 28 2017

Chart Type

Pie

Create

Now, choose a location:

- System Improvements Inc.
- Building A

Create New Widget

Settings

Location

Classification

☒ Check/Uncheck All

☒ System Improvements

- ☒ Building A
- ☐ Building B

Create

Finally, choose a Classification:

- Safety
- Accident

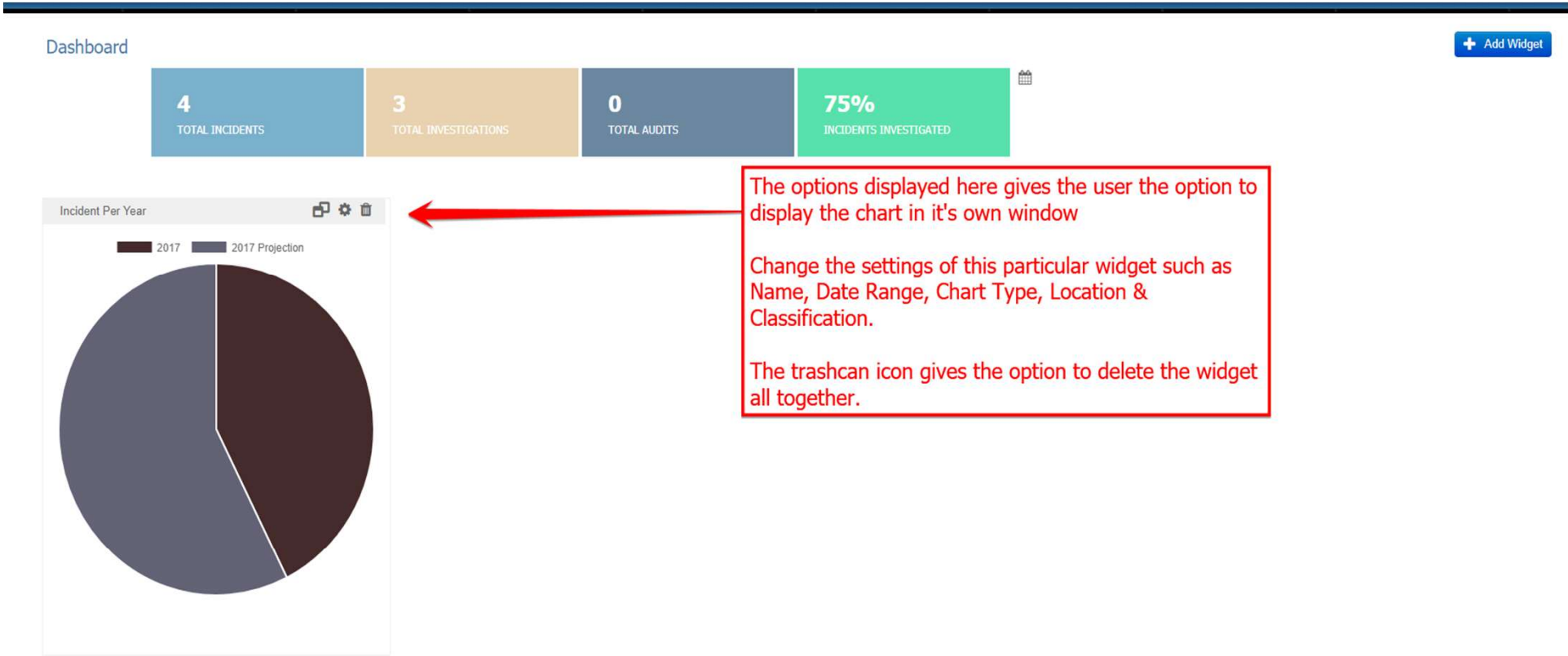
After the Classifications have been selected select **Create.**

The screenshot shows the 'Create New Widget' dialog box with the 'Classification' tab active. The classification tree is as follows:

- ☐ Check/Uncheck All
 - ☐ Environmental
 - ☐ Spill
 - ☐ New item
 - ☐ New item
 - ☐ Quality
 - ☐ Customer Complaint
 - ☐ Product Recall
 - ☒ Safety
 - ☒ Accident
 - ☐ Near Miss

The 'Create' button is located at the bottom right of the dialog box.

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



User Questions?
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