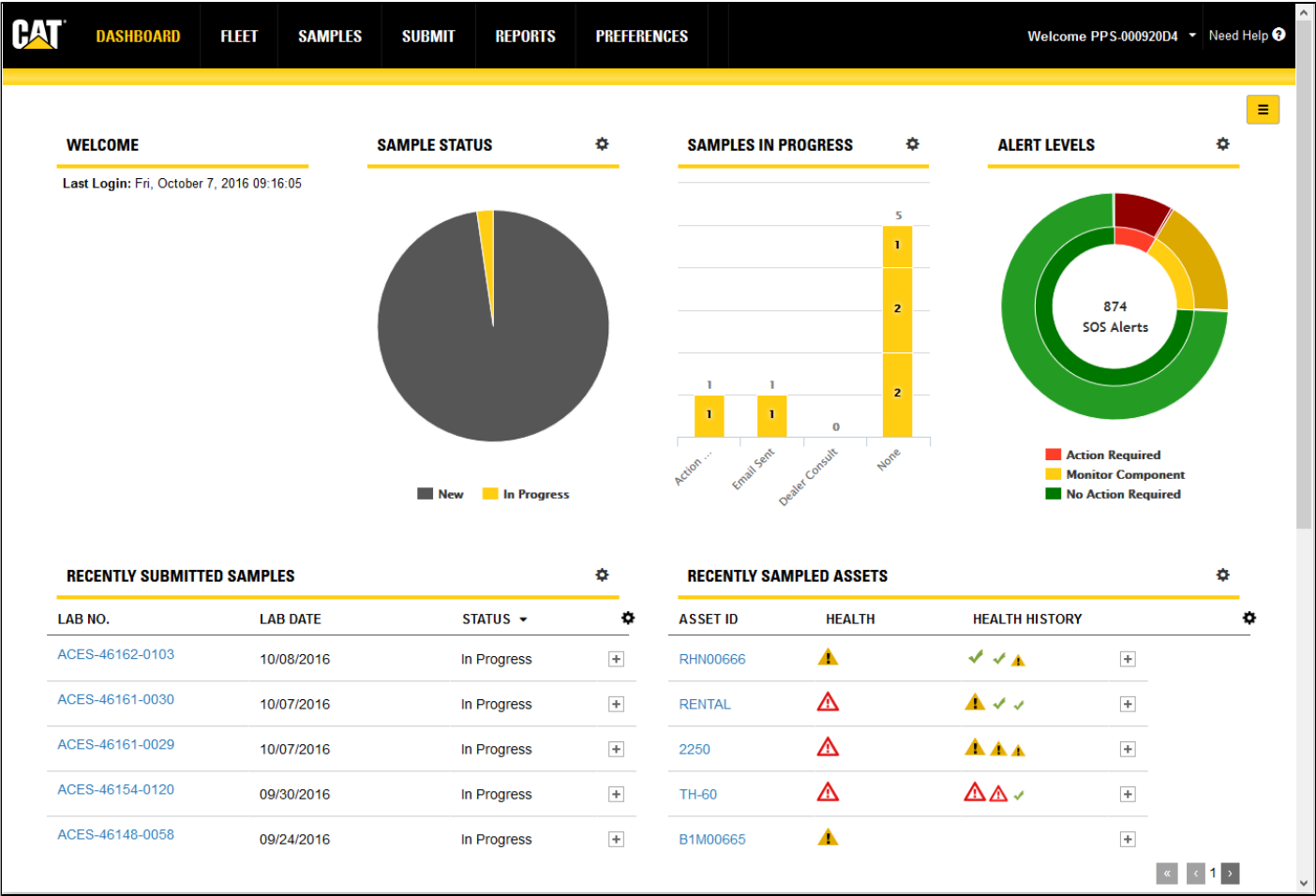# Using the Dashboard Page

The *Dashboard* page provides you with an overview of various sample elements using widgets that summarize sample information based on default system parameters and parameters you specify.

Many of the widgets in the Dashboard have links that automatically take you to other pages within the application to view sample or asset information. You can use the browser's Back button to return to the *Dashboard* page, or you can click on the **Dashboard** tab in the main toolbar.

The Dashboard can include any combination of the following widgets:

- Alert Levels
- Due Overdue Assets
- Quick Search
- Recently Sampled Assets
- Recently Submitted Samples
- Sample Status
- Samples In Progress
- Welcome

Widgets are presented in a four-column layout as shown in the example below. Most widgets occupy only one column by default, but the **Recently Submitted Samples, Recently Sampled Assets,** and the **Due Overdue Assets** widgets occupy two columns due to their widths.

Use the scroll bar on the right to view widgets that might not fit within your browser.


You can resize the overall layout by stretching or shrinking the width of your browser and adjusting the layout as needed. The widgets will remain in their assigned locations and will resize with the browser adjustment; however, smaller sizing will make it more difficult to view some widget content. The layout width also remains at four columns.

**Selecting Widgets to Display**

Click on the **Page Settings** icon found in the top right corner of the page to open a dialog box used to select the widgets that you want to appear in your Dashboard. Simply check the boxes next to the widget titles you want to use then click on **OK**.
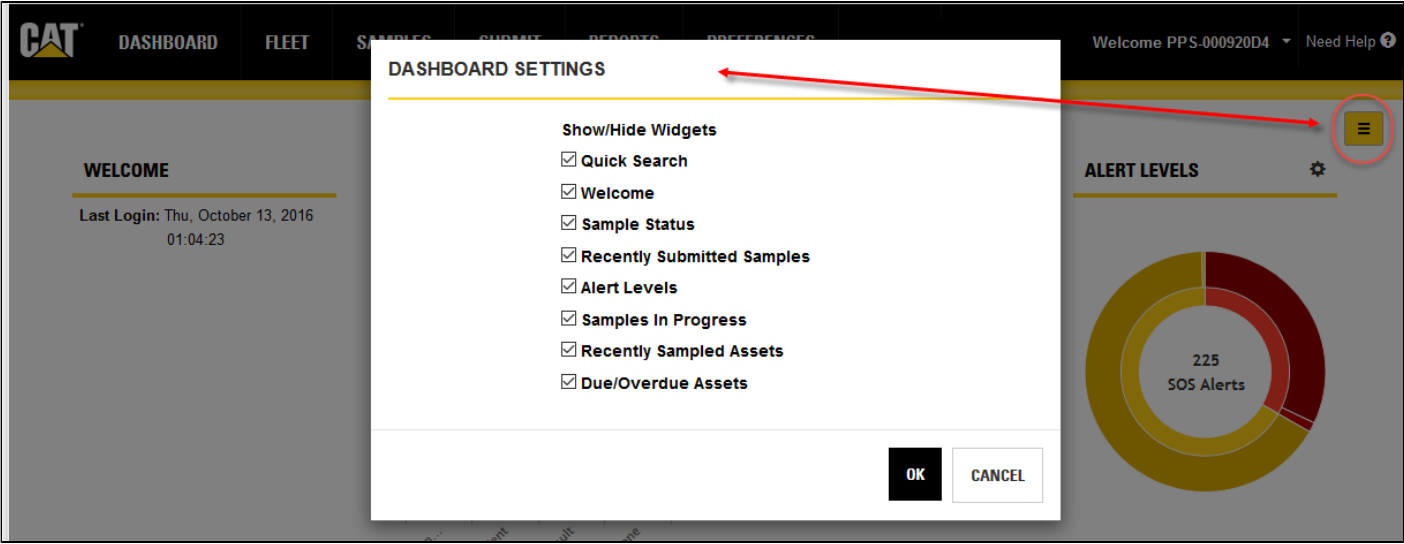
Arranging and Sizing Widgets

Drag and drop widgets to arrange your Dashboard as you prefer. Click and hold down the left mouse button over the widget's title bar and drag it to the desired location.

You will notice a gray box left behind in the old/current location and another appear when you reach a valid new location.
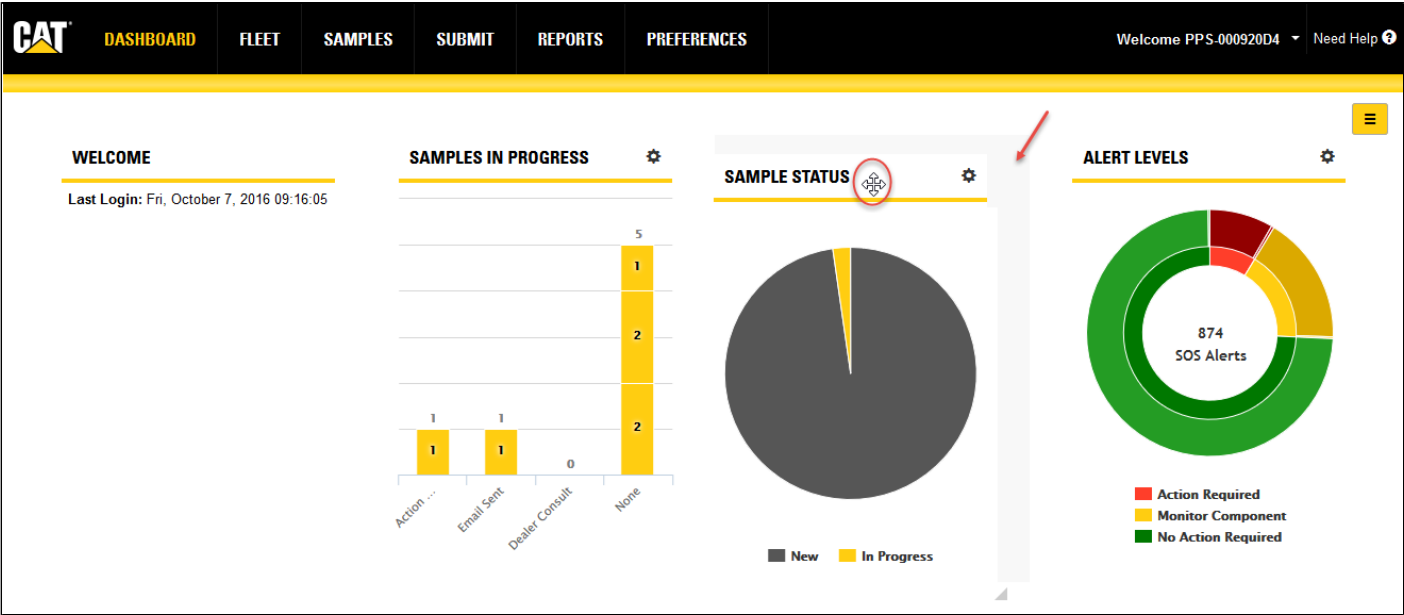
Placing one widget over another moves the lower widget to an adjacent location when you release the mouse button.

You can resize individual widgets by hovering the mouse cursor over the lower right corner, or any edge of the widget, until you see a two-headed arrow as shown in the example below. Click and hold down the left mouse button to drag the widget to the desired size.
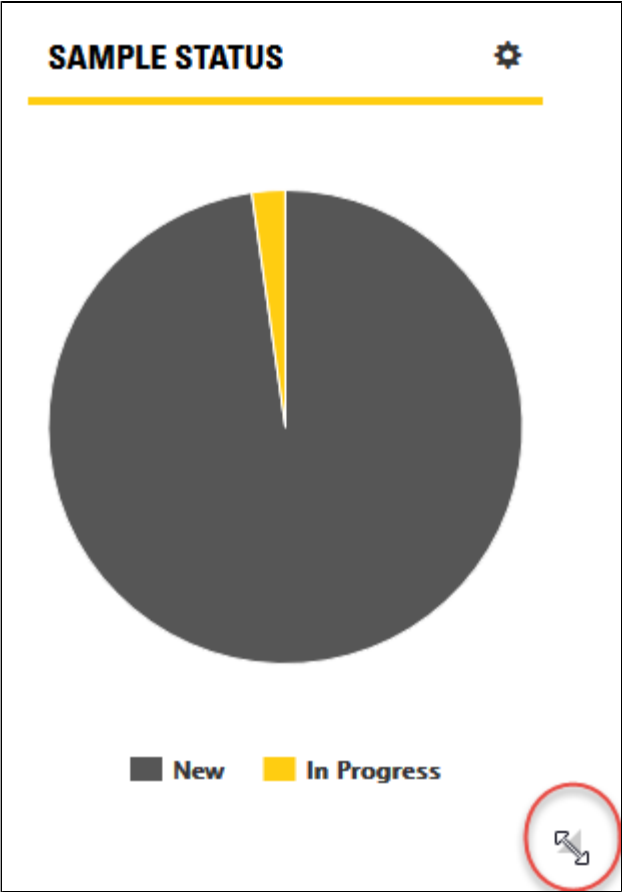
Dashboard Widget Descriptions

Alert Levels Widget

This widget features a two-level doughnut chart. The inner ring shows the number of samples for the selected period currently assigned to selected alert levels. The outer ring provides additional information by dividing samples for a selected alert level by the statuses selected.

Hovering the mouse cursor over a segment within the inner or outer ring opens a tooltip showing the details for that segment.

Clicking on a segment automatically takes you to the *Samples* page so you can view detailed information about the samples within the selected set.
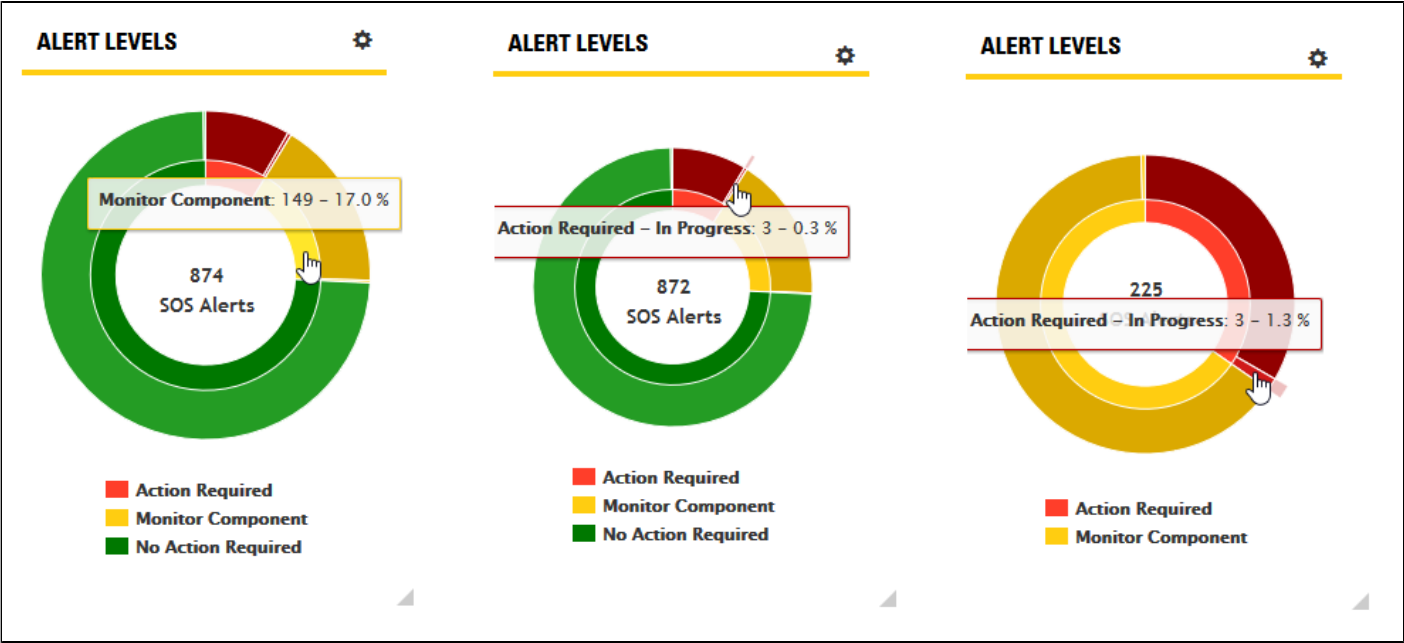
By default, the system displays the last 30 days of available information. Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period, Alert Levels, and Status parameters needed. After setting parameters, click on the **OK** button to update the sample information displayed within the widget.
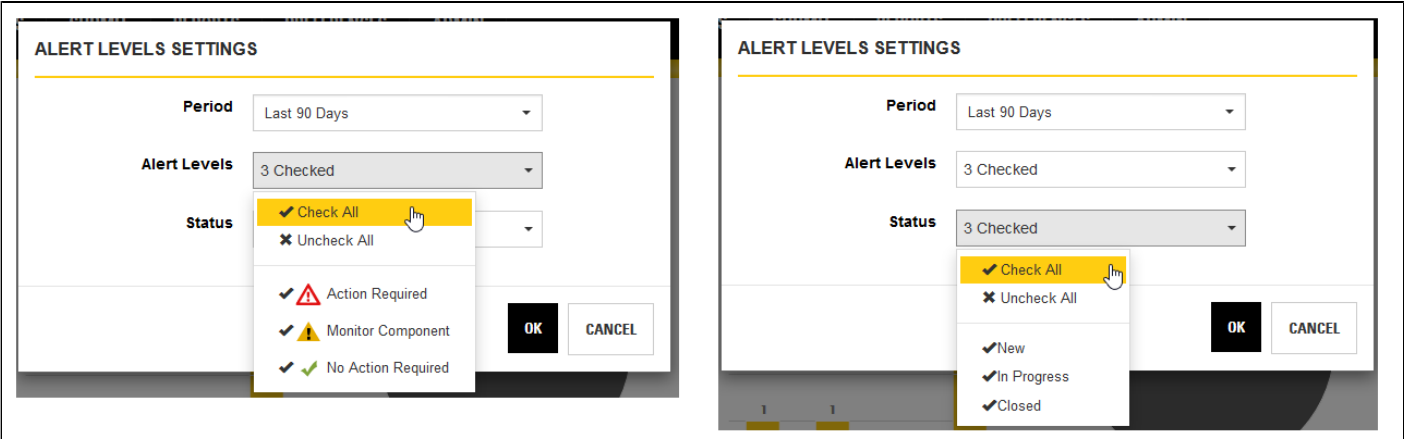
Due Overdue Assets Widget

The **Due Overdue Assets** widget provides an overview of assets that are approaching or have missed their scheduled sampling dates. As the example below illustrates, the value in the **Due/Overdue Date** column is displayed in red when a sample is overdue.

When you click on a link in the **Asset ID** column, the software automatically takes you to the *Fleet* page and opens the *Asset Details* view for the selected asset.

Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period. The available options allow you to look ahead for assets coming due for sampling or back in time to look for overdue samples. You can also specify a Custom Date to retrieve information for a specific time period.

Clicking on the **Column Settings** (second gear) icon at the top right of the widget's table opens a drop-down list so you can select the columns you want to appear within the table. If more than three columns are selected, you will see a plus sign (+) appear to the right of the columns indicating that more information is available. Clicking on the plus sign expands the row so you can view the additional information.

You can resize the column width by hovering the mouse cursor near the edge of a column header until you see a two-sided arrow as shown in the example below. Click and hold the left mouse button then drag the edge to the new size.

You can also change the order of the top three columns by hovering the mouse cursor over a column heading until you see the finger cursor as shown below. Click and hold the left mouse button then drag the heading to the new location.


Quick Search Widget

The **Quick Search** widget provides you with a tool to quickly locate samples or assets within the system.

In most cases, type ahead (suggest) values will be displayed as a list below the input field to facilitate the selection of a specific sample or asset.

When you click on the **Samples** radio button, the software uses the value entered in the input field to search across a subset of sample fields.

When multiple samples results are found, the software automatically loads the results in the *Samples* page.

When single sample matches are found, the software automatically loads the results in the *Sample Details* view.
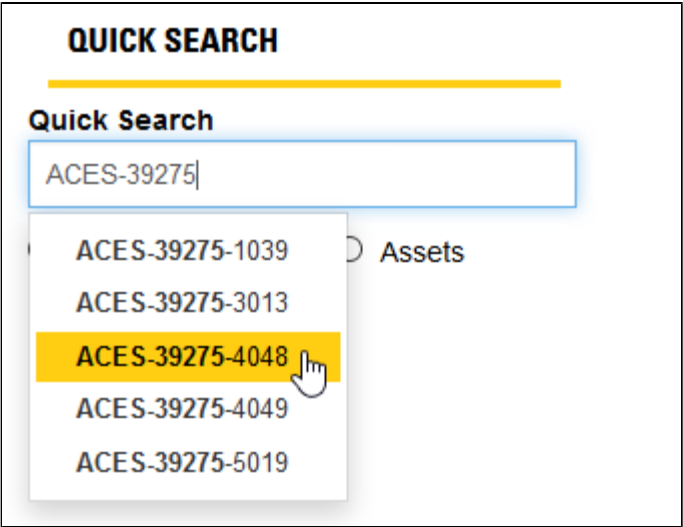
When you click on the **Assets** radio button, the software will use the value entered in the input field to search across a subset of assets (equipment) and component fields.

When multiple asset results are found, the software automatically loads the results in the *Fleet* page.

When single asset matches are found, the software automatically loads the results in the *Fleet* page *Asset Details* view.
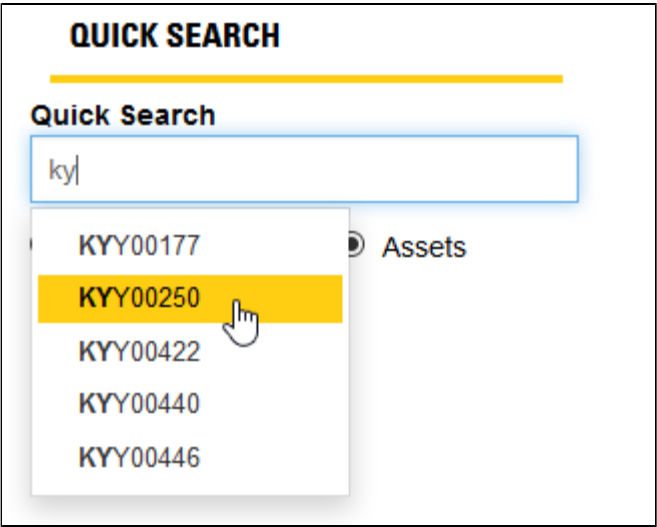
Recently Sampled Assets Widget

This widget displays information in a table view about assets that have been recently sampled.

When you click on a link in the **Asset ID** column, the software automatically loads the results in the *Fleet* page *Asset Details* view.

Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period and Alert Levels to filter the samples listed in the table.

Clicking on the **Column Settings** (second gear) icon at the top right of the widget's table opens a drop-down list so you can select the columns you want to appear within the table. If more than three columns are selected, you will see a plus sign (+) appear to the right of the columns indicating that more information is available. Clicking on the plus sign expands the row so you can view the additional information.

You can resize the column width by hovering the mouse cursor near the edge of a column header until you see a two-sided arrow as shown in the example below. Click and hold the left mouse button then drag the edge to the new size.

You can also change the order of the top three columns by hovering the mouse cursor over a column heading until you see the finger cursor as shown below. Click and hold the left mouse button then drag the heading to the new location.

Recently Submitted Samples Widget

This widget displays samples that were recently submitted in the system using a table view.

When you click on a link in the **Lab No** column, the software automatically loads the results in the *Samples* page *Sample Details* view.

Hovering the mouse cursor over a link in the **Lab No** column opens a tooltip like the one shown in the example so you can quickly view related sample and fluid information, and recommendations (if available).

Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period for the samples submitted to filter the samples listed in the table.

Clicking on the **Column Settings** (second gear) icon at the top right of the widget's table opens a drop-down list so you can select the columns you want to appear within the table. If more than three columns are selected, you will see a plus sign (+) appear to the right of the columns indicating that more information is available. Clicking on the plus sign expands the row so you can view the additional information.

You can resize the column width by hovering the mouse cursor near the edge of a column header until you see a two-sided arrow as shown in the example below. Click and hold the left mouse button then drag the edge to the new size.

You can also change the order of the top three columns by hovering the mouse cursor over a column heading until you see the finger cursor as shown below. Click and hold the left mouse button then drag the heading to the new location.

Samples In Progress Widget

The **Samples In Progress** widget provides you with an overview of samples that are in progress within the sampling process.

Columns are organized by activities, which are shown on the X-axis. Hovering the mouse cursor over an entry in a column opens a tooltip to reveal the number of samples assigned to a specific alert level within the activity.

When you click on an entry within a column, the software automatically switches to the *Samples* page so you can view more detailed information about the samples assigned to the activity.
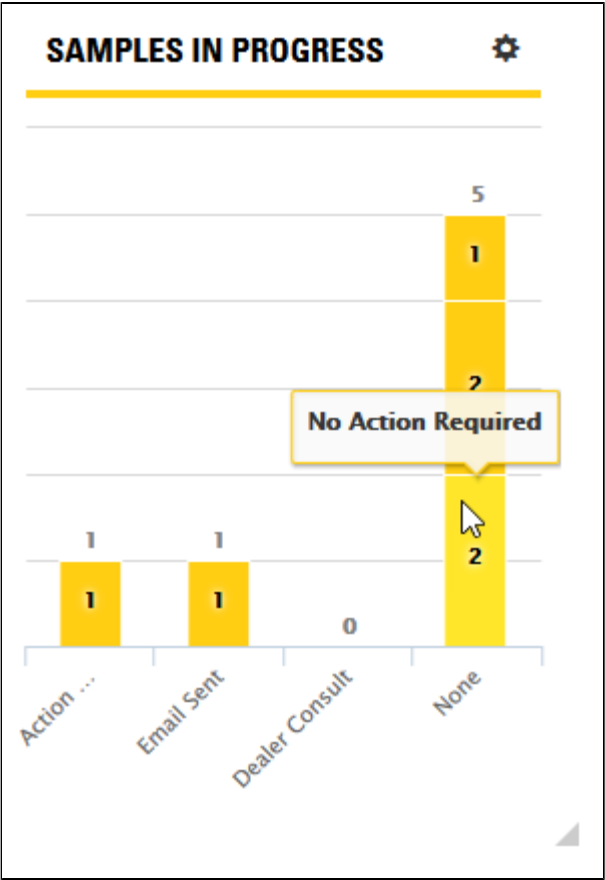
By default, the system displays the last 30 days of available information. Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period, Alert Levels, and Activities parameters needed. After setting parameters, click on the **OK** button to update the sample information displayed within the widget.
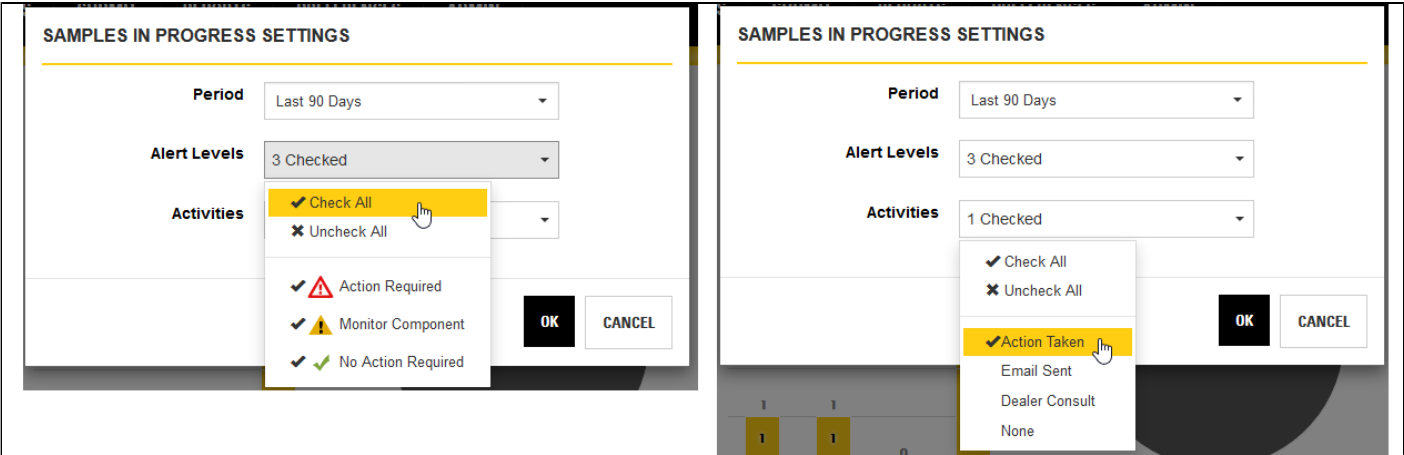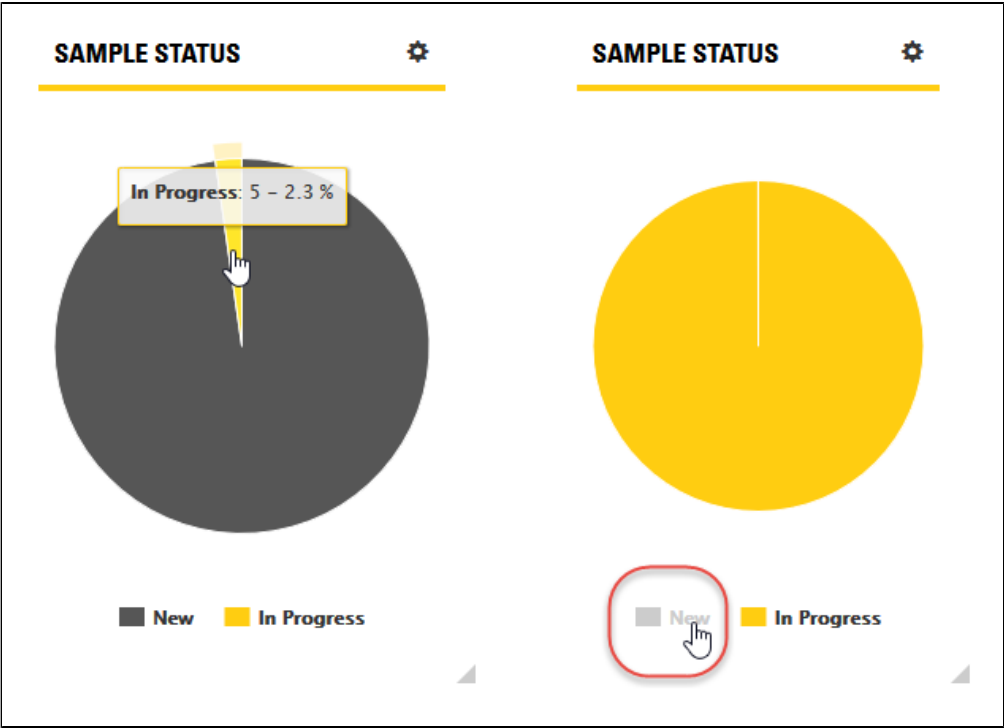

Sample Status Widget

Use the **Sample Status** widget to quickly check the number (or percentage) of samples in the system that have been assigned to specific statuses over a specified time range.

Hovering the mouse cursor over a slice in the pie chart opens a tooltip showing the number and percentage of samples assigned to the specific status.

When you click on a slice in the pie chart, the software automatically switches to the *Samples* page so you can view more detailed information about the samples assigned to the related status.

Clicking on an item in the legend below the pie chart toggles the display of that status within the chart.

Clicking on the **Settings** (gear) icon in the top right corner opens a dialog box used to define the period for the samples.

Welcome Widget

The **Welcome** widget provides you with general information about the application along with information about the last time you logged into the system. The widget can also include message from the system administrator.