Setting up your Dashboards

To access and setup your dashboards inside the Compeat Portal (https://portal.compeat.com), follow the steps outlined below.

Accessing the Dashboard link inside the Compeat Portal

All users who will be accessing dashboards need to be a part of a security group named "Dashboards", which must be set up and configured inside the Advantage product.

A user with access to your company's security password, should navigate to Setup > Security > Groups in the Advantage client.

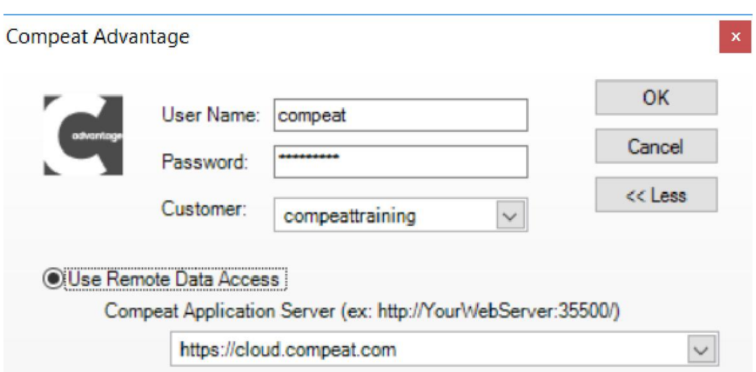
Once there, if you do not already have a security group setup named "Dashboards", they should click the green plus sign on to create a new record.

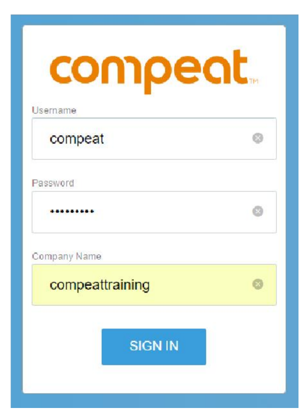
NOTE: The security group must be spelled "dashboards". If it is named anything else, access to dashboards will be denied.

Any user that you want to access the dashboards should be added to the security group. It is not necessary to check anything in the screen access tab, or on any other tab of the group setup. Users can be part of multiple groups and should retain their access to any group they are currently a member of.

Simply adding a user to a group called dashboards will enable them to access the dashboards feature in the portal. Once they are a part of this group, the dashboards link in the Customer Portal will become clickable for that user.

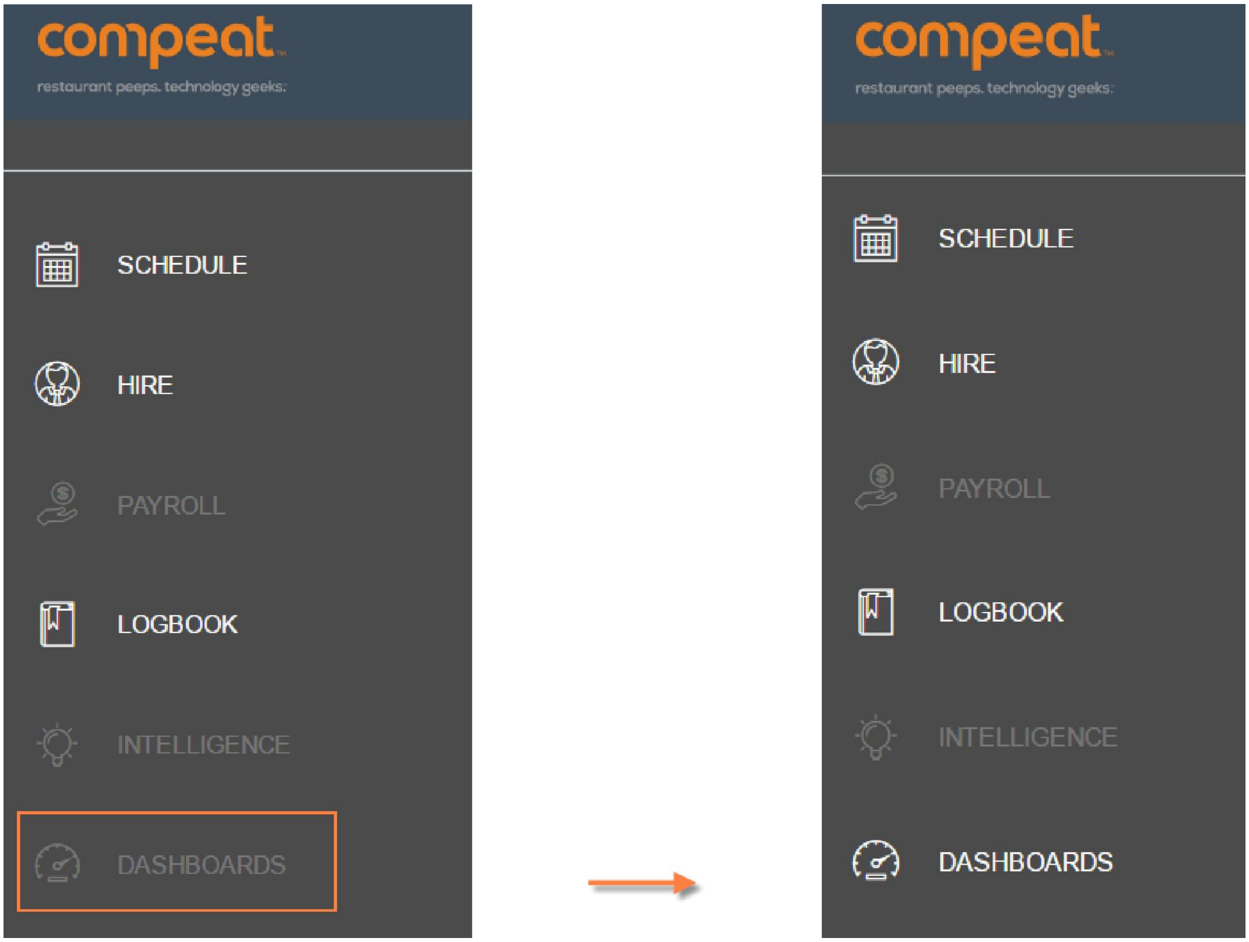
Once your Advantage user is part of the Dashboards group, login to https://portal.compeat.com with your Advantage username, Password and Customer name that you use today to login to Advantage.





DASHBOARD SETUP OVERVIEW

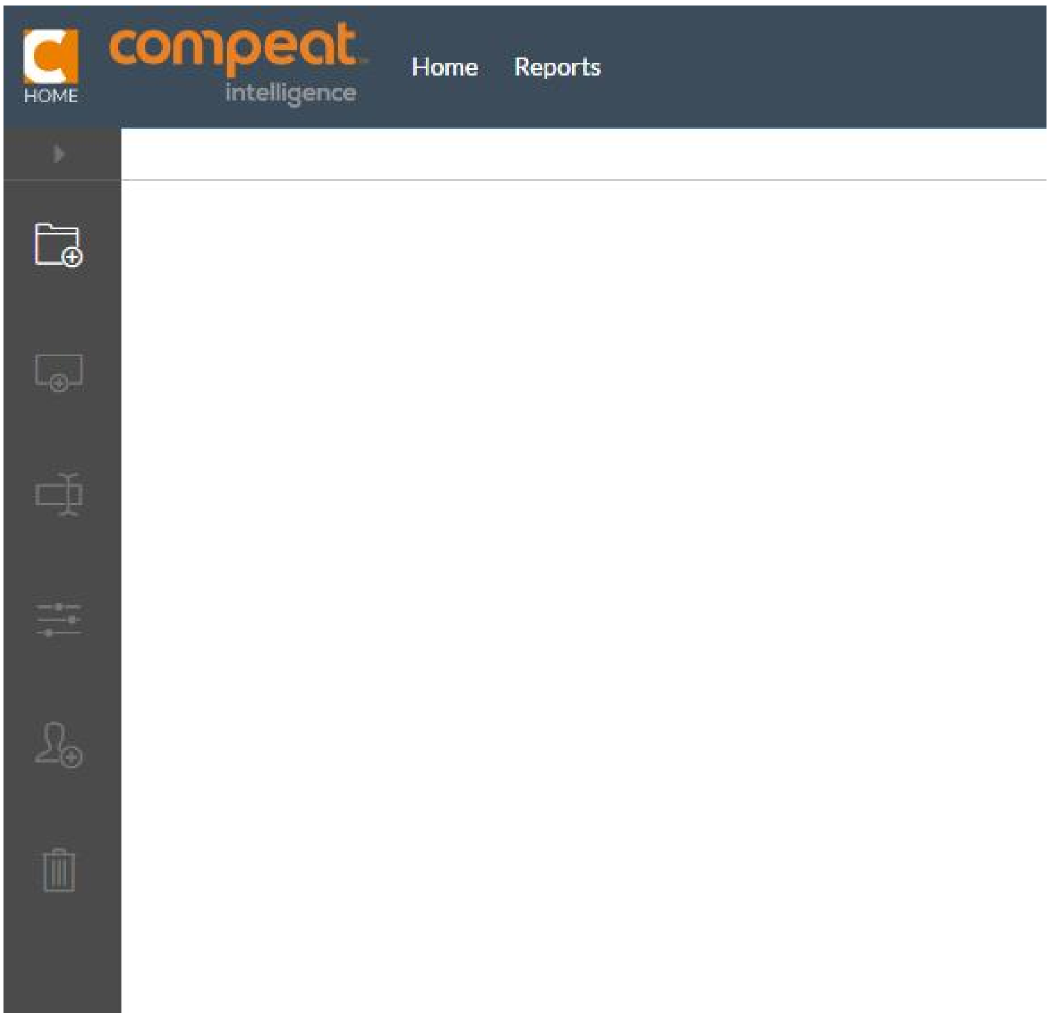
Your dashboards link will light up for your user, once you are a member of the dashboards security group:



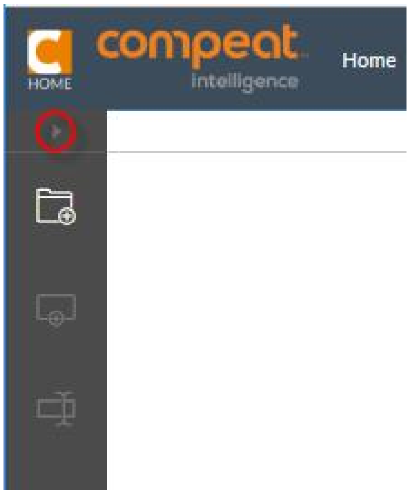
Adding a New Dashboard

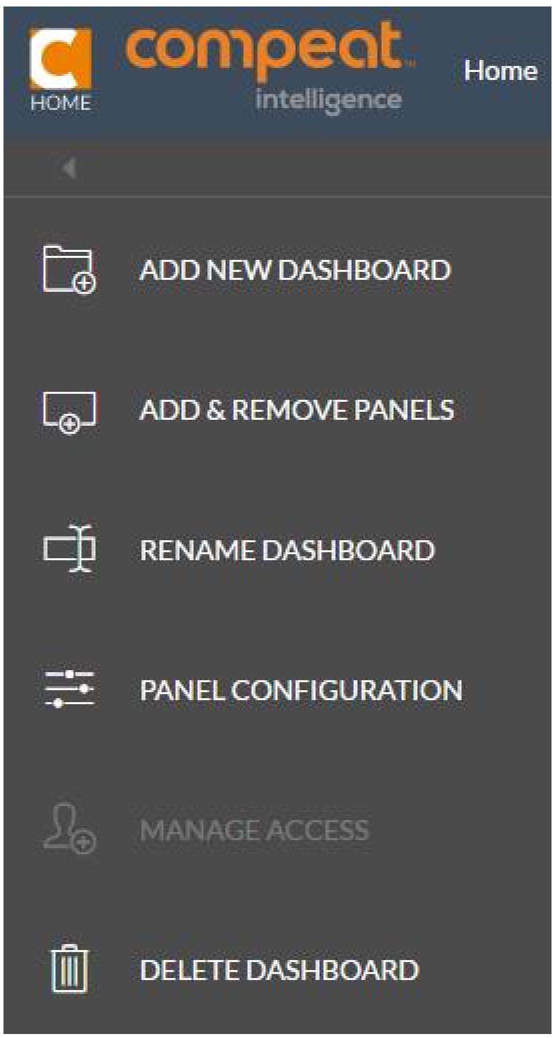
All users will have their own unique dashboards. We plan to release dashboard sharing, but the initial version will require users to setup their own.

When you login to Intelligence for the first time, you will land on a blank dashboard.

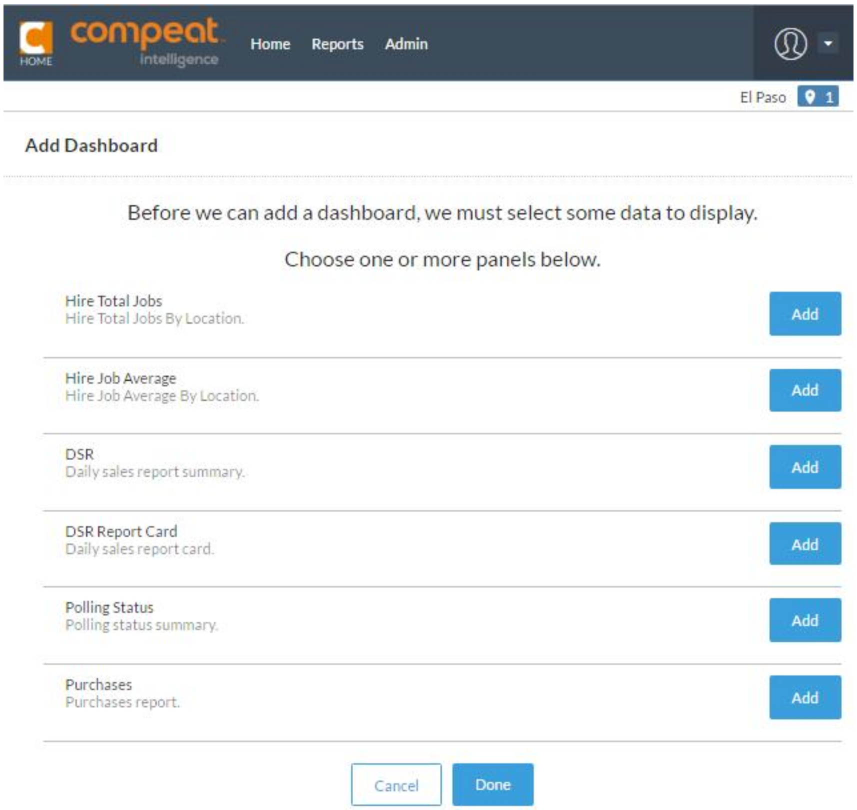


To access the side menu, expand out the sidebar with the small arrow on the top left to see the menu option names.


compeat
intelligence
HOME
Home


compeat
intelligence
HOME
Home
ADD NEW DASHBOARD
ADD & REMOVE PANELS
RENAME DASHBOARD
PANEL CONFIGURATION
MANAGE ACCESS
DELETE DASHBOARD

Click ADD NEW DASHBOARD. After clicking it, you will be prompted to choose which panels will live on your new dashboard.

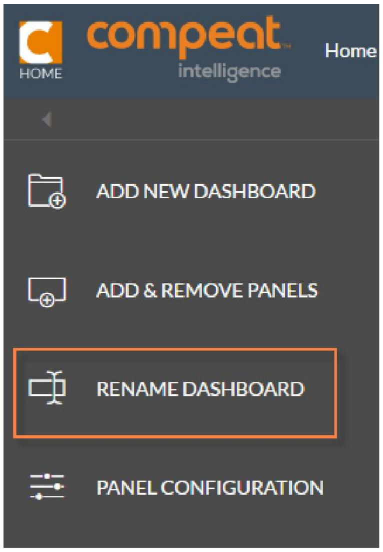


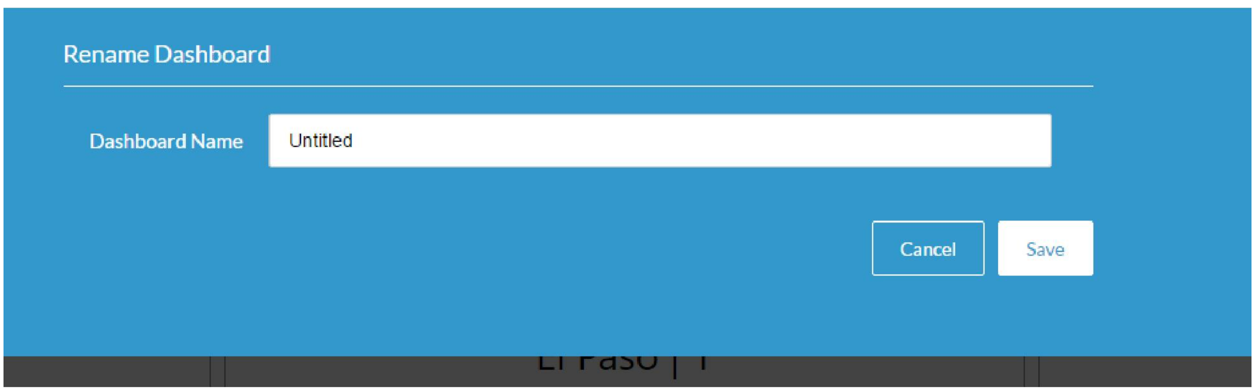
Select Add for any panel you want on your first dashboard. You will be able to add or remove panels later if you change your mind later

After adding the panels and clicking done, you will see a dashboard full of unconfigured panels that you will configure next.

First though, rename your dashboard by clicking RENAME DASHBOARD. Your dashboard will be named "Untitled" until you name it.

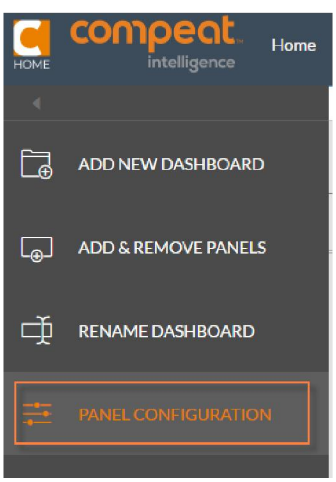
NOTE: You can add multiple dashboards, so you may end up defining dashboards for individual restaurants or by region.



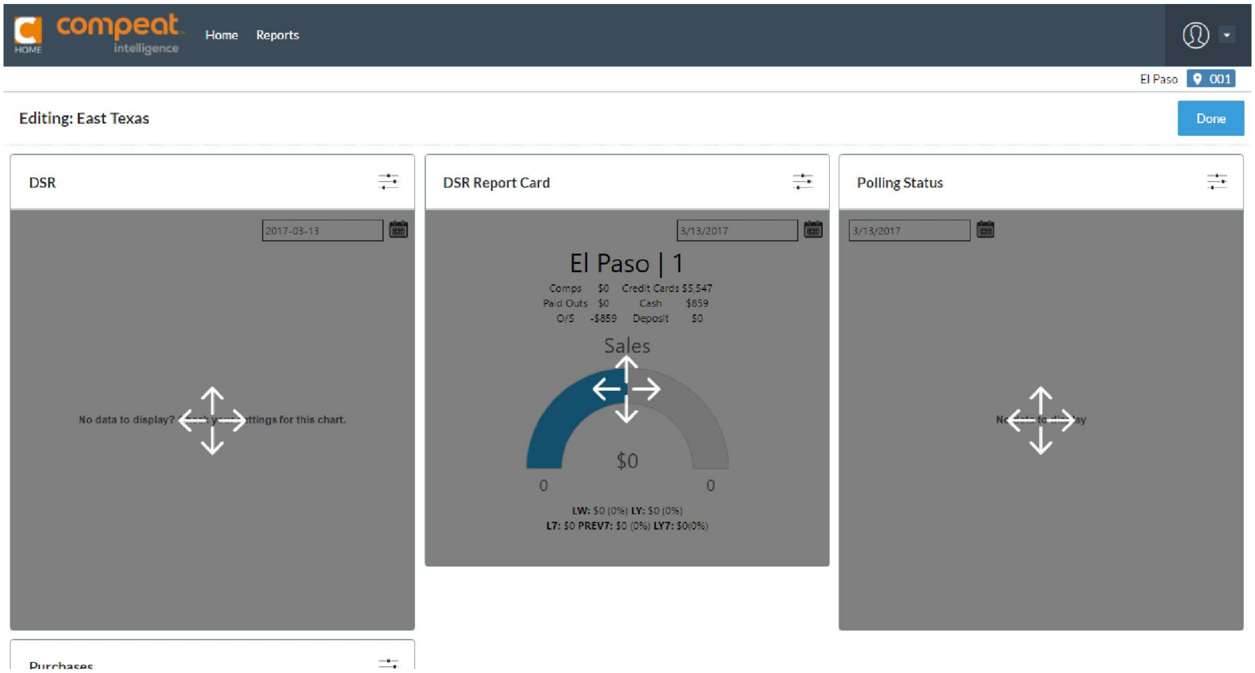


Configuring the Panels

Your newly added panels will not be displaying any data until they are configured. To get them setup, click on the PANEL CONFIGURATION button.

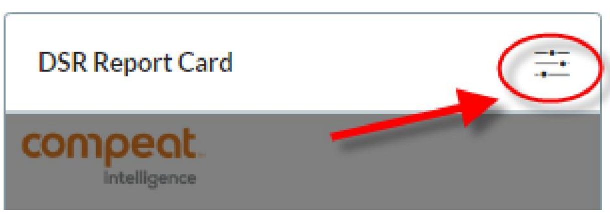


This will take you into a configuration mode where you can move and configure your panels.



To move the location of your panels, click and drag anywhere on a panel.

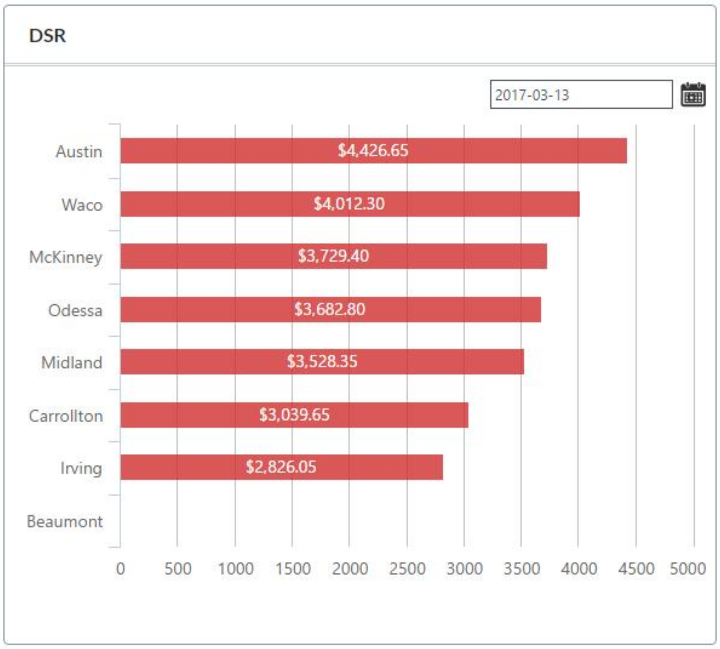
To configure your panel to display data, click on the Configure icon in the upper right hand corner of any of the panels. This will take you into the setup screens for each panel.



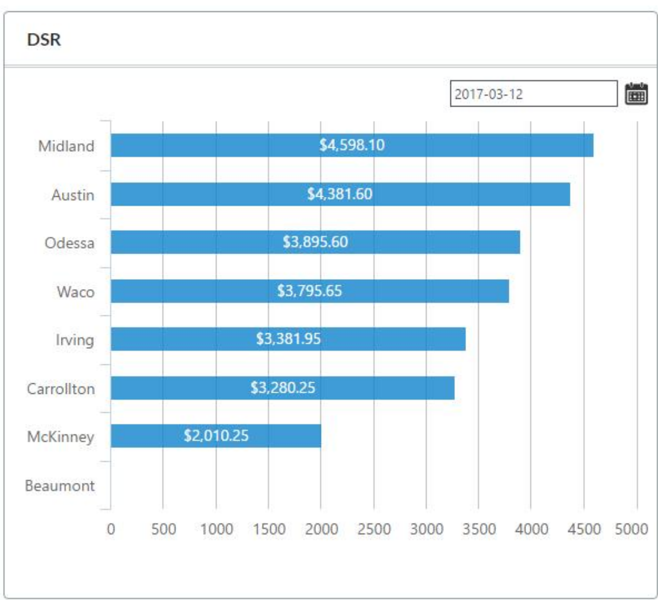
Let's review the configuration options for each of the panels.

DSR Sales Panel – This panel provide a horizontal graph of polled total sales by entity for the previous day. It will default to the previous day, but can the date can be changed with the date picker.

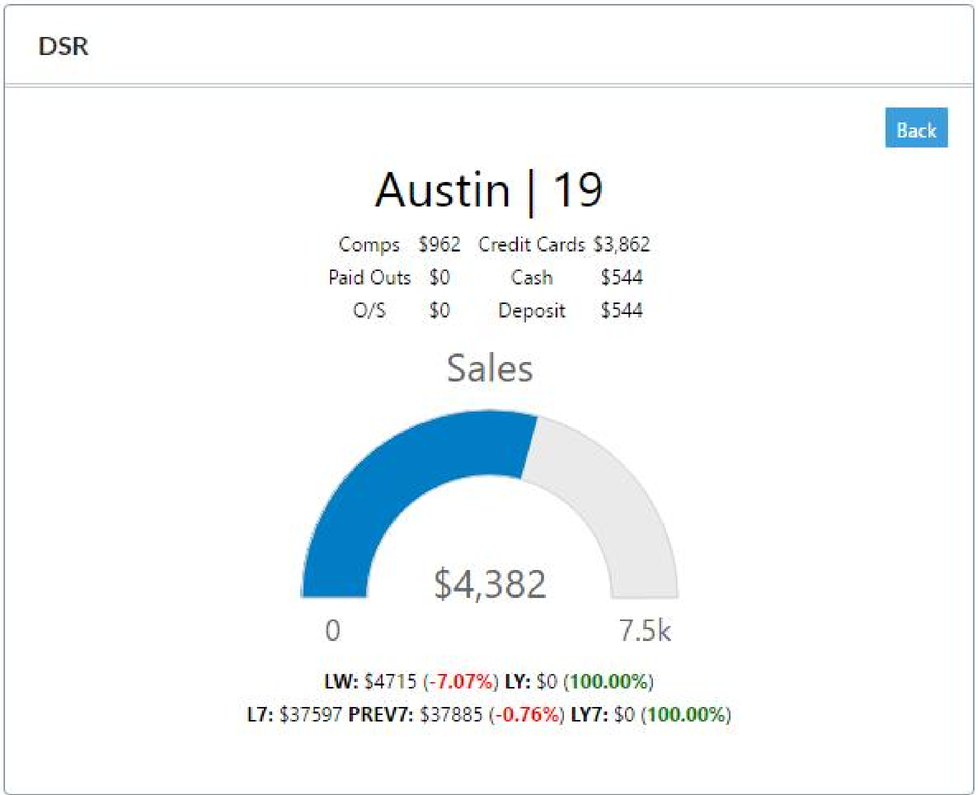
If the data being reported is from unposted DSR's, the bar graph will return in Red.



If the DSR's are posted, the graph turns Blue:



If an entity did not poll, the result will show zero. You can drill into any of the bars to get a closer look at the day's activity:



Notice that this view gives you some detailed information from the DSR, and also shows a historical comparison at the bottom, so that you can see at a glance how the entity performed against the same day last week, last year, and also how the last seven days compared to the previous seven days, and the same seven days last year.

Configuring DSR Sales Panel

You will be configuring which general ledger accounts and which entities are reported in the panel using GL Filters and Entity Filters. These are setup inside the Advantage database, and you'll need security access to them in order to view how they are setup or to add new ones.

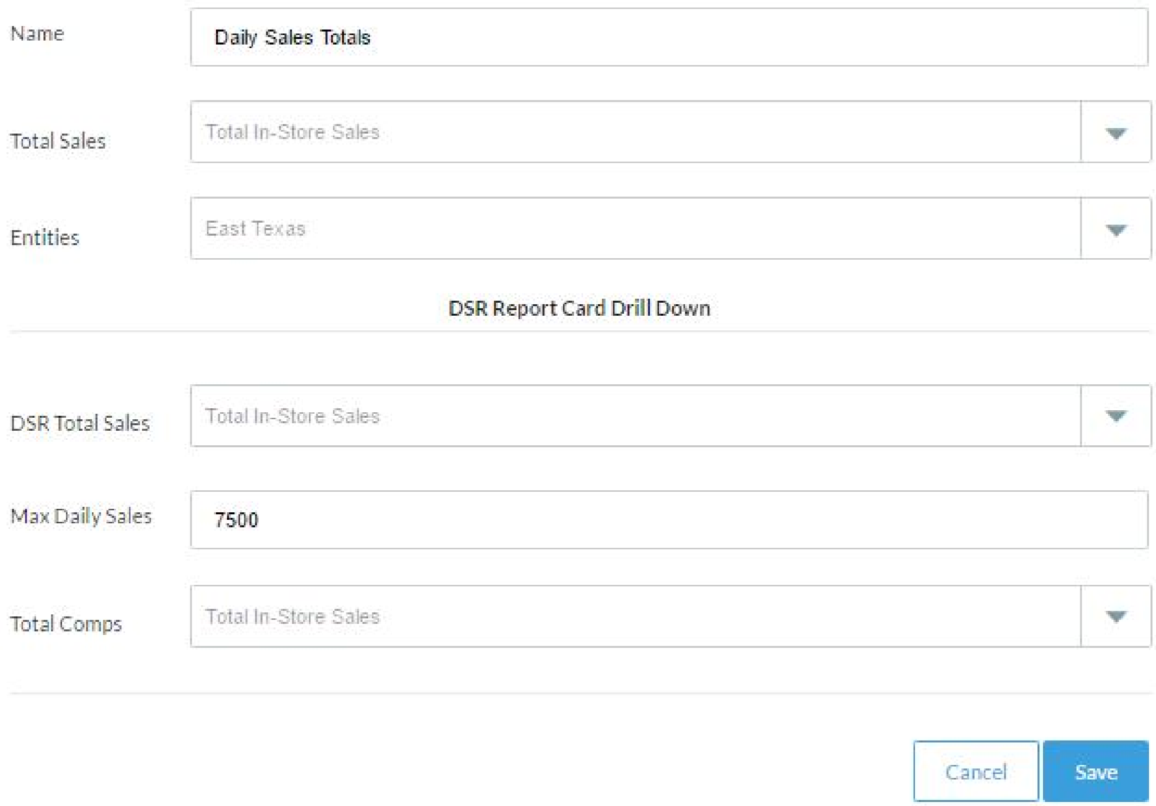
GL filters are a collection of a single or multiple General Ledger account numbers. These will be used throughout the panel configurations, and while you may have some already setup in your database, you will likely need to setup additional filters.

Entity Filters are groupings of entities. If you want the DSR Sales graph to report on all your entities, you will need an entity filter that contains all your sites.

The setup for GL and Entity filters is under the Setup tab of your Advantage software – filters you add in Advantage will become immediately available for selection inside Dashboards.

NOTE: The DSR Sales graph may not display properly if you have more than 15 entities groups in the entity filter you use, so you may want to make several dashboards with DSR Sales graphs setup by region.

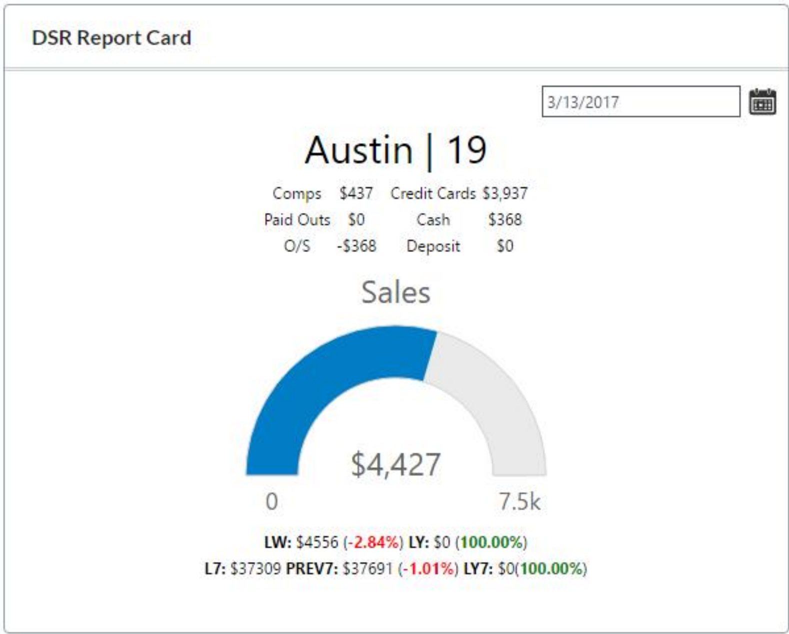
Here is an image of the configuration screen for DSR Sales:



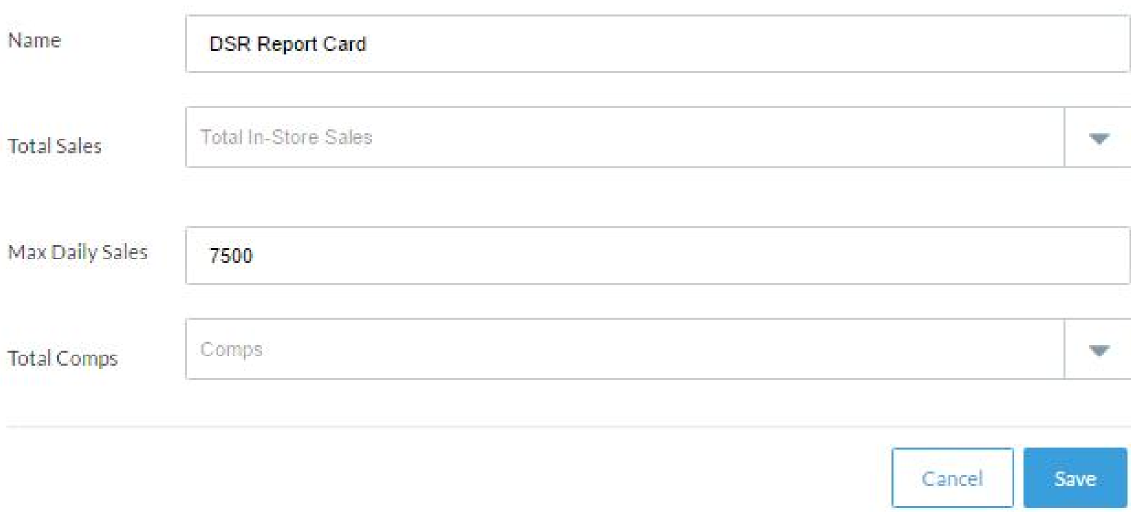
Configuration options:

- **Rename the panel –** this will display on your dashboard with the name you give it.
- **Select an Account Filter to track polled DSR sales** – determine whether you want to display gross or net sales by choosing an entity filter that you have setup in the Advantage software.
- **Choose an Entity Filter to select which restaurants to track** – this graph may not display properly if you have more than 15 entities groups in the entity filter you use, so you may want to make several different dashboards with DSR Sales graphs setup by region
- **For the drill down portion, specify the DSR Report Card options:**
    - Choose the Total Sales to display by selecting an Account Filter from the drop down – generally this should be the same account you used above.
    - Set a Max Daily Sales figure to display in the arc graph of your Total Sales for the day – set this to be higher than your typical sales for a day.
    - Choose an Account Filter for Total Comps – you may need to setup an additional account filter as you will likely not have a comps GL Filters already in place.

DSR Report Card – This is the standalone version of the drill down from the DSR Sales graph. It has the option to change the date, but by default will always show the previous day. The entity comes from whatever entity you are logged into when enter the dashboard. If you wanted to see the DSR report card for a different entity, you would change entities with the entity switcher in the upper right hand corner of the screen.



Here's an image of the configuration screen for the Report Card:

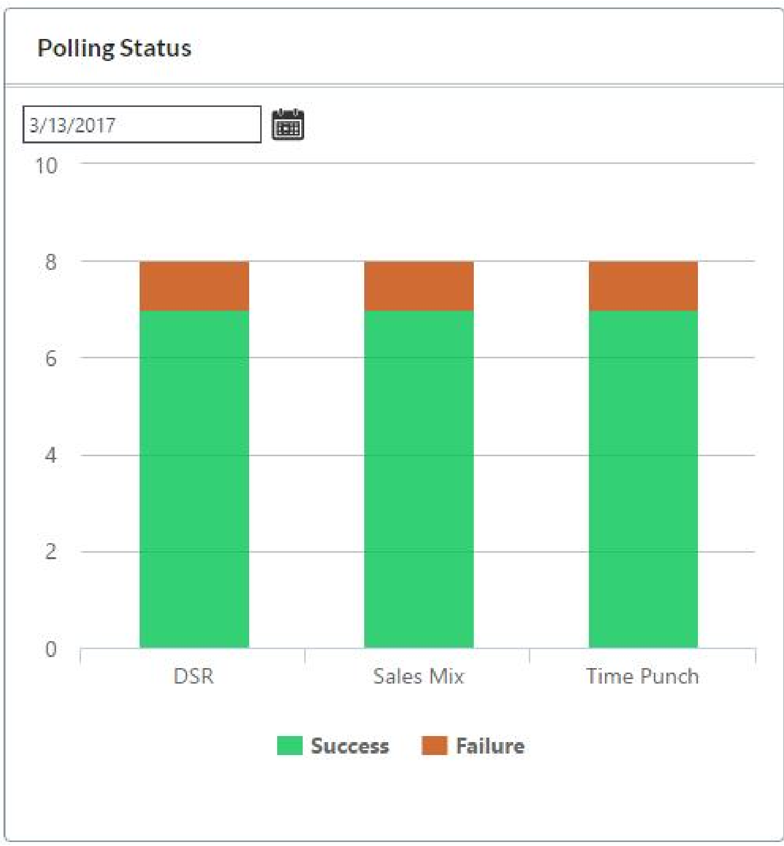


Configuration options:

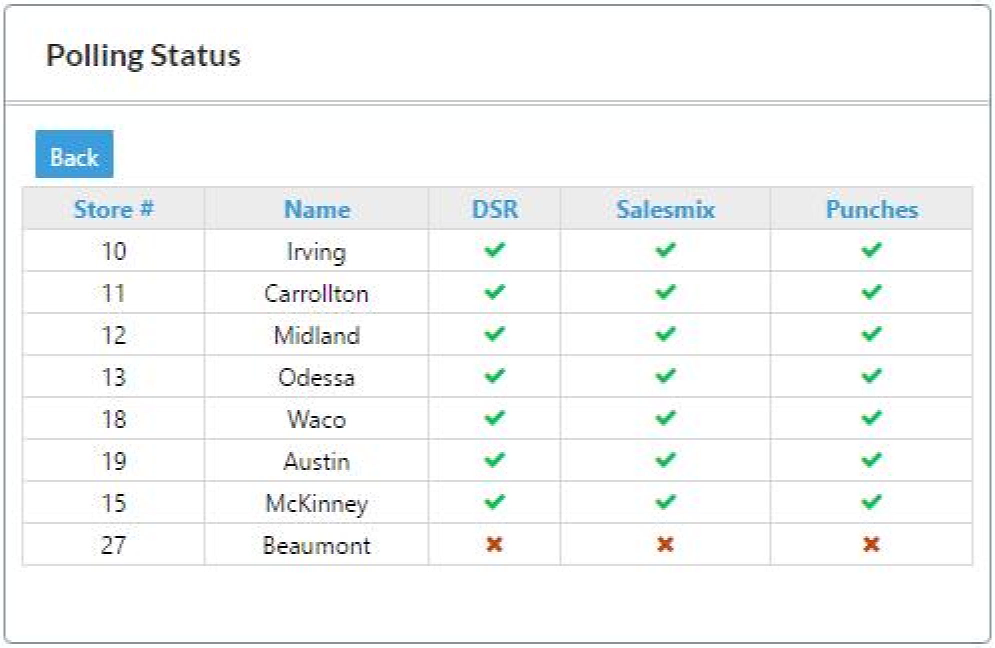
- Rename the panel
- Choose the Total Sales to display by selecting an Account Filter from the drop down
- Set a Max Daily Sales figure to display in the arc graph of your Total Sales for the day
- Choose an Account Filter for Total Comps

Polling Status – this panel gives the ability to at a glance see if all your sites polled for the previous day. Green indicates polling success and red indicates a failure.

DSRs, Salesmix and Time Punch polling is tracked by checking to see if data for the previous day is available. You can change to a different date with the date picker, but the default when entering your dashboard will always be for the previous day.



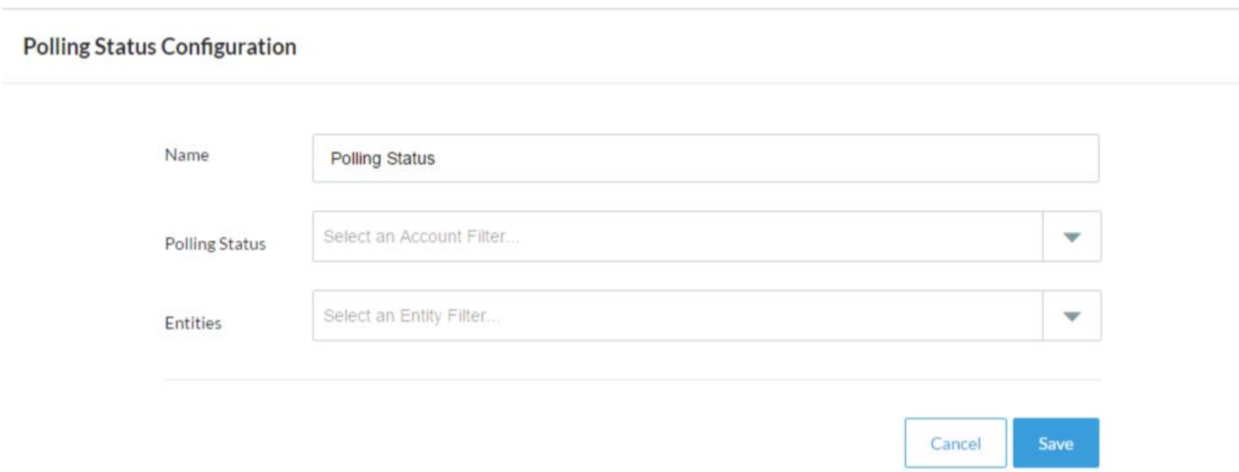
If there is a failure, and you want to see what entity failed to poll, click on any of the bars to get a drill through of the results:


Polling Status

Back

Store #	Name	DSR	Salesmix	Punches
10	Irving	✔	✔	✔
11	Carrollton	✔	✔	✔
12	Midland	✔	✔	✔
13	Odessa	✔	✔	✔
18	Waco	✔	✔	✔
19	Austin	✔	✔	✔
15	McKinney	✔	✔	✔
27	Beaumont	✖	✖	✖

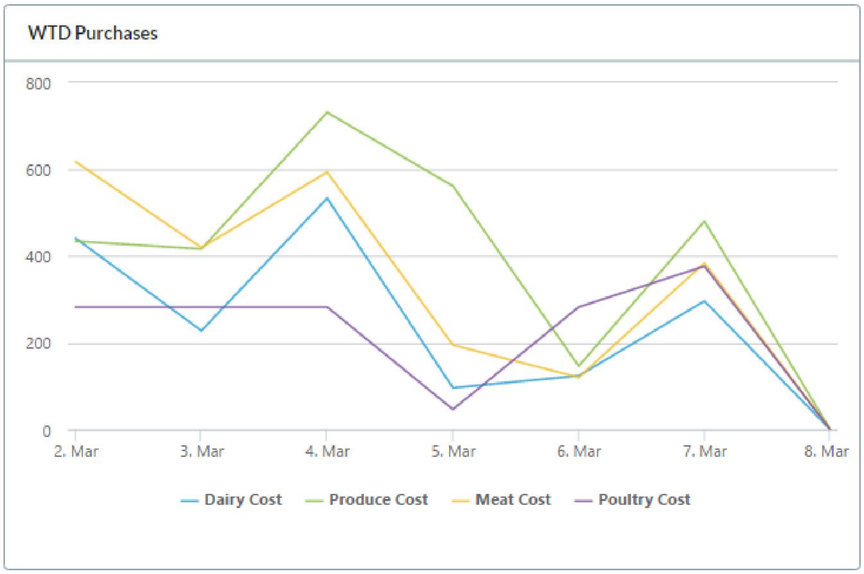
The Polling Status configuration is simple to setup:



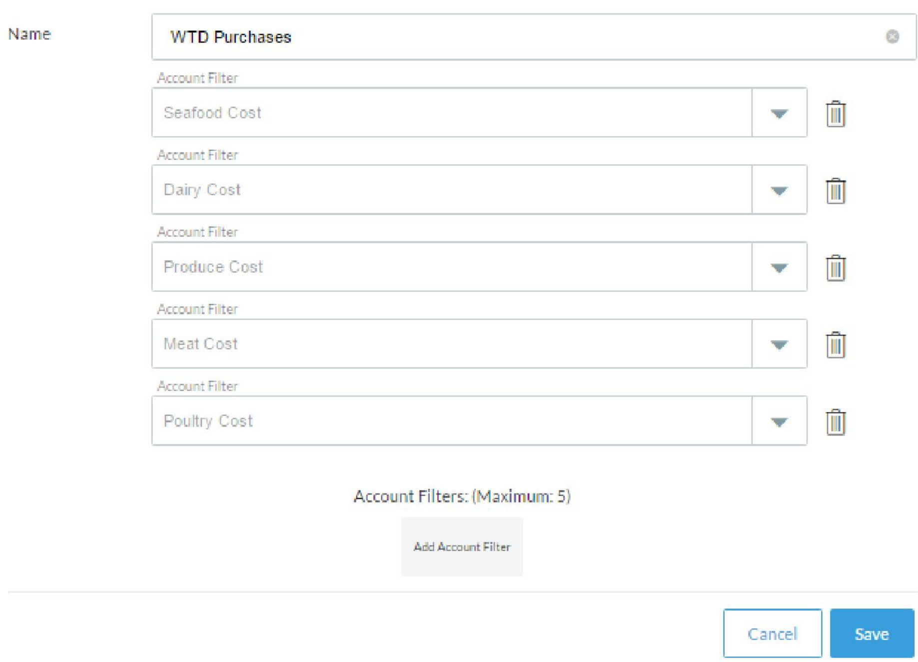
Configuration options:

- Rename the panel
- Select an Account Filter to track polled DSR sales – you can set it to the same account you used for the DSR Sales panels or choose another account that is included in the DSR's.
- Choose an Entity Filter to select which restaurants to track –

Purchases – Choose up to five categories to track for a graph of week-to-date activity for the entity you are currently logged into. The categories can be toggled on or off at the bottom to give a better view of the data.



To setup, the configuration will require you to add the categories you want to track (up to 5) using preconfigured GL Filters.



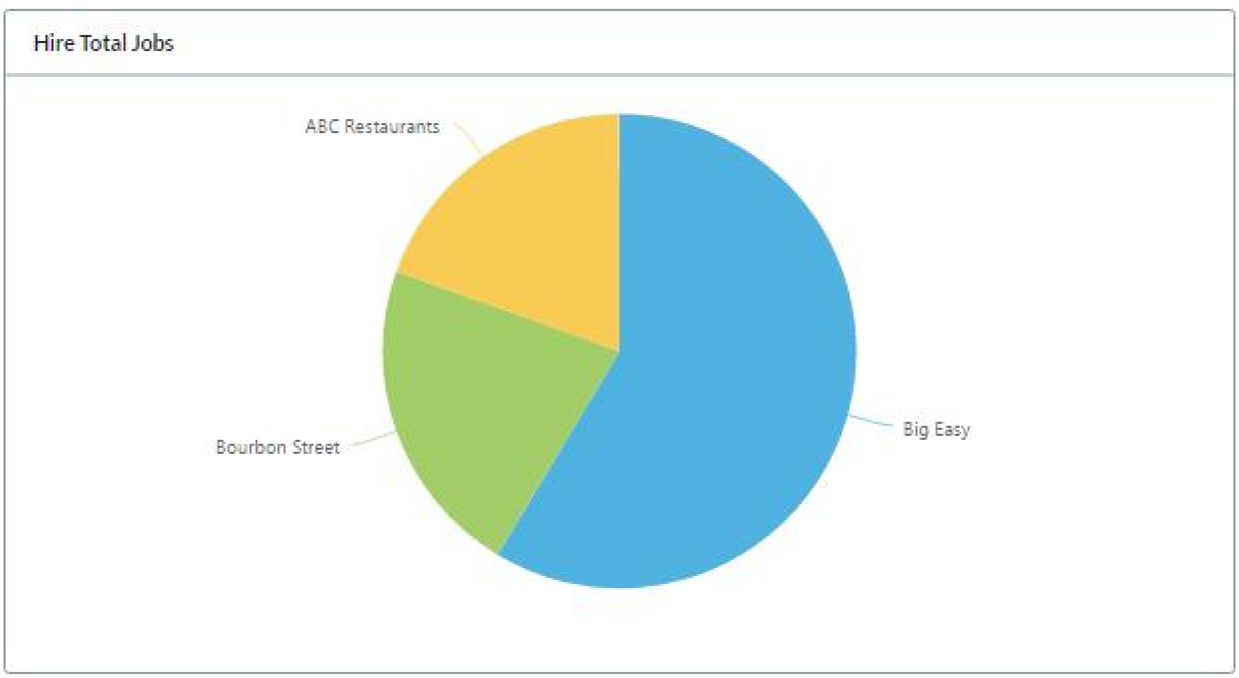
Configuration options:

- Rename the panel
- Select an Account Filter to track
- Add up to 4 more Account Filters to track on the graph

HIRE Panels

There are currently two panels available on the dashboards if your company is using the Hire product.

Hire Total Jobs – drillable report summarizing the total job applicants by store (no configuration necessary)



Clicking on one of the pie areas drills to an analysis grid with totals for that concept:

Hire Total Jobs

Formula | Filter | Add Chart | Add Crosstab

Table

EntityName	Job Title	Job Count
Big Easy	Cashier	2
Big Easy	Dishwasher	12
Big Easy	Food Runner	1
Big Easy	Line Cook	16
Big Easy	Server	20

The analysis grids gives you the ability to interact with the data either by adding formulas or filters to the columns or creating chart from the data. The data can be exported to Excel by clicking the down arrow next to the gear icon.

Hire Job Average – The panel is an Analysis Grid of the average time to hire by job (no configuration necessary)

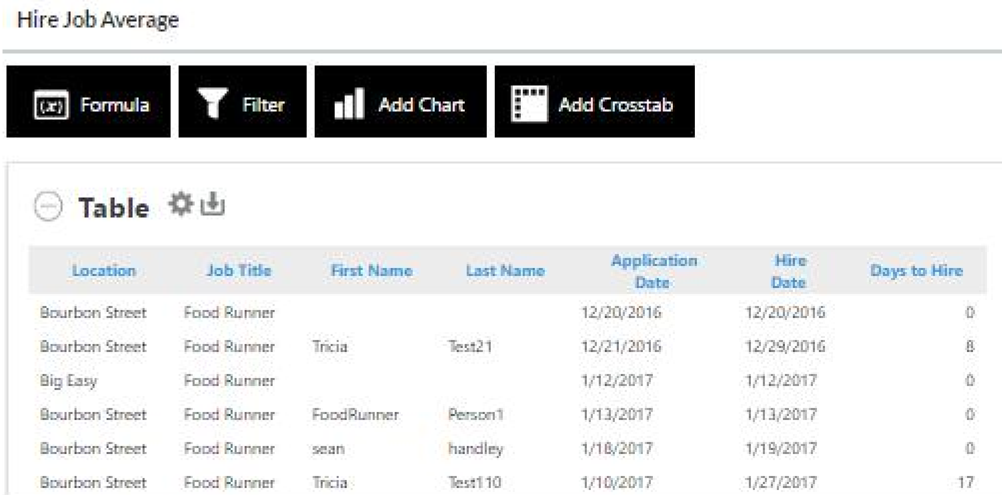
Hire Job Average

Formula | Filter | Add Chart | Add Crosstab

Table

Location	Job Title	Avg Time To Hire
ABC Restaurants	Dishwasher	0
ABC Restaurants	General Manager - Restaurant Division	0
ABC Restaurants	Line Cook	0
ABC Restaurants	Server	0
Big Easy	Cashier	0
Big Easy	Dishwasher	0
Big Easy	Food Runner	0
Big Easy	Line Cook	0
Big Easy	Server	0
Bourbon Street	Dishwasher	0
Bourbon Street	Food Runner	5

Drills to an analysis grid of the hires, with Application and Hire dates:



Location	Job Title	First Name	Last Name	Application Date	Hire Date	Days to Hire
Bourbon Street	Food Runner			12/20/2016	12/20/2016	0
Bourbon Street	Food Runner	Tricia	Test21	12/21/2016	12/29/2016	8
Big Easy	Food Runner			1/12/2017	1/12/2017	0
Bourbon Street	Food Runner	FoodRunner	Person1	1/13/2017	1/13/2017	0
Bourbon Street	Food Runner	sean	handley	1/18/2017	1/19/2017	0
Bourbon Street	Food Runner	Tricia	Test110	1/10/2017	1/27/2017	17

Other Siderail Options

ADD & REMOVE PANELS

Once you have a dashboard, you can add or remove panels to it by clicking this selection from the sidebar. As Compeat makes additional panels available, you can add them to your dashboard through this option.

As new panels are released, you'll be able to add them to your dashboards through this utility.

MANAGE ACCESS

This option (once released) will take you to the dashboard sharing utility, where you will be able to share a dashboard you have created with another user or user group.

DELETE

Use this tool to deletes the dashboard you are currently viewing. You will be prompted to confirm deletion after clicking Delete.