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Dashboard

The dashboard allows you to create and display a customizable “quick look” at specific statistics in your database. The Dashboard is User-specific. Each Member Tracking System User who has permission for My Dashboard can have his/her own customized Dashboard.

1. From the Main Menu, click on Reports.
2. Click on the Organization\Unit tab
3. Click on My Dashboard. (If you do not have permission for this report, please contact your System Administrator to grant you permissions.)
OR CTRL SHIFT D
4. Click on the Configure button.
5. On the Dashboard Sets tab, change the Set Name if you like.
6. Check the Primary Set box if this will be your Primary dashboard.
7. Click in the first box under Set Name.
8. Click the Item dropdown to choose the first item you would like to see on your dashboard.
9. Modify the filters on the right hand side to filter for your specific information.

User Dashboard Configuration

Dashboard Sets | Dashboard Look

Configuration Set: Monthly Statistics

Set Name: Monthly Statistics Primary Set:

Item: Average Daily Attendance

Screen Description: Average Daily Attendance

Unit Attended: {ALL Units you have permission to view}

Date Attended: This Month

Activity Attended: {All Activities}

10. You can show the same main category of information on the left hand side multiple times. To differentiate the items on your Dashboard, make sure to change the Screen Description on the right hand side to reflect the criteria you have selected.

User Dashboard Configuration

Dashboard Sets | Dashboard Look

Configuration Set: Monthly Statistics

Set Name: Monthly Statistics Primary Set:

Item: Average Daily Attendance

Screen Description: Average Daily Attendance - 4 Weeks Ago

Unit Attended: {ALL Units you have permission to view}

Date Attended: 4 Weeks Ago

Activity Attended: {All Activities}

11. If you wish to have an item on the left be above or below another item, simply click in the box that you wish to move and use the arrows on the far left hand side.

User Dashboard Configuration

Dashboard Sets | Dashboard Look

Configuration Set: Admin Dashboard

Set Name: Admin Dashboard Primary Set:

Members Served - Month to date Unit 01	Item: Count of Members who attended
ADA this Week Unit 01	Screen Description: Members Served - Month to date Unit 01
ADA this Month Unit 01	Member's Current Unit: 01 - Downtown Unit
Attend 8 + Days This Month Unit 01	Unit Attended: {ALL Units you have permission to view}
	Date Attended: Last Month
	Activity Attended: {All Activities}
Member Enrollments Expiring	Member's Gender: {All genders}
Total of Charges This Month	Member's Status: {All Statuses}
Total of Payments This Month	Member's Age Group: {All Age Groups}
Current Member Balance	Member's Ethnicity: {All Ethnicities}
Attended Last Month - Grades PK-5	Group Membership: {Don't Filter by Group}
Attended Last Month Grades 6 plus	Current School Grade: No Filter
Attended Last Month All Grades	

This reports the unduplicated count of members who attended within the date range you specify.

To add a new item, click on a blank box on the left, then make a selection from the Item box on the right. Delete Item

Auto-start Dashboard after log-in Add New Set Delete This Set Close

12. Check the box on the bottom left to Auto-start Dashboard after log-in if you would like the Dashboard to show each time you log into Member Tracking System.
13. You can change the appearance of your Dashboard as well. Click on the Dashboard Look tab at the top and you can change the colors, fonts, and font sizes.
14. If you opted to show your Dashboard after log-in, then close Member Tracking System and log back in. You should see your Dashboard according to your criteria.

User Dashboard

Configuration Set: Admin Dashboard

Members Served - Month to date Unit 01:	76	List
ADA this Week Unit 01:	75	
ADA this Month Unit 01:	75	
Attend 8 + Days This Month Unit 01:	76	List
Member Enrollments Expiring:	0	List
Total of Charges This Month:	\$2,005.00	
Total of Payments This Month:	\$630.00	
Current Member Balance:	\$1,375.00	
Attended Last Month - Grades PK-5:	37	List
Attended Last Month Grades 6 plus:	37	List
Attended Last Month All Grades:	77	List

Preview Print Export to Excel Email Results Auto-Notify Configure Refresh Close

15. You can Preview, Print, Export and Email the results of the dashboard.
16. You can also setup Auto-Notify to send the dashboard to the MTS Notify App that can be purchased for your phone.