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.

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.

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.

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.

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.