

Dashboards

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How to create a live dashboard on a web portal?

To create live dashboard of web user account, please follow the steps mentioned below:

1. From left **Navigation Menu**, go to **Reports & Analysis** and click **Dashboards..**
2. Click on + icon to **Add new graph.**
3. Now select **Organisational hierarchy.**
4. **Pick a template** the data you want to view and **Pick a module** and **then pick the activity.**
5. Click **Submit** to view chart or graphs.
6. Data can be filtered by **Filter by** option.
7. Under **Configuration**, select the general configuration of data to be shown on **X-axis** and **Y-axis** along with **time field** and **chart type.**
8. Choose an option from **Group by** and **Order by** menu.
9. Under **Mobile Configuration**, select **Time Interval** and **Refresh Interval** for graphs visible in field user's mobile app.
10. Click on **Submit** to view the graph.

How to add dashboards to user home page?

To add dashboards to Web and Mobile home page, please follow the steps mentioned below:

1. From left **Navigation Menu**, go to **Reports & Analysis** and click **Dashboards..**
2. Click on + icon to **Add new graph.**
3. Now select **Organisational hierarchy.**
4. **Pick a template** the data you want to view and **Pick a module** and **then pick the activity.**
5. Click **Submit** to view chart or graphs.
6. Data can be filtered by **Filter by** option.
7. Under **Configuration**, select the general configuration of data to be shown on **X-axis** and **Y-axis** along with **time field** and **chart type.**
8. Choose an option from **Group by** and **Order by** menu.
9. Under **Mobile Configuration**, select **Time Interval** and **Refresh Interval** for graphs visible in field user's mobile app.
10. Click on **Submit** to view the graph.
11. Click on **Add to dashboard** appearing on upper right hand side.
12. Add **Name** and **Description** under **Info.**
13. Click on **Assigned To** tab.
14. Click on the **user groups** to assign the dashboards.
15. Click **Submit** and the dashboards will be visible to those user groups.

How to setup analytical graphs & charts for web users?

To create live dashboard of web user account, please follow the steps mentioned below:

1. From left Navigation, go to Reports & Analysis and click **Dashboards**.
2. Select **WEB DASHBOARDS**.
3. Click on **Add new graph** and **Pick an activity**.
4. **Pick a level** and **Pick a territory** and **Submit it**.
5. Choose an option from **Group by** and **Order by** menu.
6. Choose options from **Y-axis**.
7. Click on **Submit**.
8. Finally, click on **Add to dashboard**.

How to assign dashboards to users?

To assign dashboards to the users, please follow the steps mentioned below:

1. From left **Navigation Menu**, go to **Reports & Analysis** and click **Dashboards..**
2. Click on + icon to **Add new graph.**
3. Now select **Organisational hierarchy.**
4. **Pick a template** the data you want to view and **Pick a module** and **then pick the activity.**
5. Click **Submit** to view chart or graphs.
6. Data can be filtered by **Filter by** option.
7. Under **Configuration**, select the general configuration of data to be shown on **X-axis** and **Y-axis** along with **time field** and **chart type.**
8. Choose an option from **Group by** and **Order by** menu.
9. Under **Mobile Configuration**, select **Time Interval** and **Refresh Interval** for graphs visible in field user's mobile app.
10. Click on **Submit** to view the graph.
11. Now click on **Add to Dashboard** on top right hand side.
12. Fill **Name** and **Description** under **Info.** Check **Allow Dynamic Parameters** as per requirement.
13. Click on **Assigned To** tab and select the **user groups** to assign dashboard.

How to setup dashboard for targets on mobile app?

To add performance dashboards to the mobile app, please follow the steps mentioned below:

1. From left Navigation, go to Reports & Analysis and click **Dashboards**.
2. Choose **MOBILE DASHBOARDS**.
3. Click on **Add new graph**.
4. Drag and drop **Target status** in a tab.
5. Click on **Max interval settings** and choose the date.
6. Click on the field and set **name, description, refresh interval and display** type.
7. Click on **Save**.
8. Once created, click on **assign users**.
9. select users and **update**.

How to setup dashboard for tasks progress on mobile app?

To add performance dashboards to the mobile app, please follow the steps mentioned below:

1. From left Navigation, go to Reports & Analysis and click **Dashboards**.
2. Choose **MOBILE DASHBOARDS**.
3. Click on **Add new graph**.
4. Drag and drop **Task breakup** in a **tab**.
5. Click on **Max interval settings** and choose the date.
6. Click on the field and set **name, description, refresh interval and display** type.
7. Click on **Save**.
8. Once created, click on **assign users**.
9. select users and **Update**.

How to setup dashboard for order taken on mobile app?

To add performance dashboards to the mobile app, please follow the steps mentioned below:

1. From left Navigation, go to Reports & Analysis and click **Dashboards**.
2. Choose **MOBILE DASHBOARDS**.
3. Click on **Add new graph**.
4. Drag and drop **Total order booked** in a tab.
5. Click on **Max interval settings** and choose the date.
6. Click on the field and set **name, description, refresh interval and display** type.
7. Click on **Save**.
8. Once created, click on **assign users**.
9. select users and **update**.

How to setup dashboard for leave status on mobile app?

To add performance dashboards to the mobile app, please follow the steps mentioned below:

1. From left Navigation, go to Reports & Analysis and click **Dashboards**.
2. Choose **MOBILE DASHBOARDS**.
3. Click on **Add new graph**.
4. Drag and drop **View status of leave** in a tab.
5. Click on **Max interval settings** and choose the date.
6. Click on the field and set **name, description, refresh interval and display** type.
7. Click on **Save**.
8. Once created, click on **assign users**.
9. select users and **update**.

How to setup incentive dashboard for mobile users?

To add performance dashboards to the mobile app, please follow the steps mentioned below:

1. From left Navigation, go to Reports & Analysis and click **Dashboards**.
2. Choose **MOBILE DASHBOARDS**.
3. Click on **Add new graph**.
4. Drag and drop **User incentive** in a tab.
5. Click on **Max interval settings** and choose the date.
6. Click on the field and set **name, description, refresh interval and display** type.
7. Click on **Save**.
8. Once created, click on **assign users**.
9. select users and **update**.

How to quickly see location of all my mobile users?

On your web dashboard, you will be able to see mobile user's (Reporting directly or indirectly) location on the map. Please note the location on the map can be seen for users logged in the app.

How to view the users logged in to FeetPort on web?

On your web dashboard by default, you will be able to see mobile and web users status reporting directly to you. Please follow:

1. Just under the map with user status, you will be able to see **MOBILE USERS STATUS (REPORTING DIRECTLY TO YOU)** and **WEB USERS STATUS (REPORTING DIRECTLY TO YOU)** options.
2. Web users status **LOGGED IN**, **LOGGED OUT** and **NOT LOGGED IN** can be seen as well as **MARKED IN**, **MARKED OUT** and **ON LEAVE** for mobile users.

How to configure Mobile User Dashboard?

Mobile user dashboard keeps mobile users updated with their performance with help of analytics and charts. Mobile user dashboard can be easily configured with the following steps:

1. From **Navigation Menu**, go to **Reports & Analysis** module.
2. Choose **Dashboards** sub module.
3. Select 'Mobile Dashboards' and click on plus icon '+'.
4. On the bottom, click on any number which represents how many tabs you want in the dashboard (ie for 1 tab click on 1 . for 2 tabs click 2 and son on)
5. Now from the left side drag **analytics options** to the tabs.
6. **Name** the tab as per your preference and click on it
7. Click on analytics option and select name, description, refresh interval and type of chart (Bar or Pie).
8. Click on **Right** icon on top to **save** it.

How to delete the Dashboard from FeetPort Web?

Dashboard can be deleted from FeetPort web portal through following steps:

1. From left **Navigation Menu**, go to **Reports & Analysis** and click **Dashboards..**
2. Click on the **checkbox** **against any of the dashboard** that you wish to delete.
3. Click on **delete** icon on upper right handside.
4. Click on **Delete** on confirmation dialog box.
5. Selected Dashboard will get deleted.

How to view and edit the Dashboards?

To view and edit the dashboards in FeetPort, follow these steps:

1. From left **Navigation Menu**, go to **Reports & Analysis** and click **Dashboard**.
2. You will be able to view the list of the created Dashboards.
3. Click on **any of the dashboard** that you wish to edit.
4. Edit the fields under **Configuration**.
5. Click **Submit**.

How to delete report/ graph in a Dashboard in FeetPort?

Reports of a dashboard can be deleted from FeetPort web portal as per following steps:

1. From **Navigation Menu**, go to **Reports & Analysis** module and click on **Dashboards** sub module.
2. Now you will be able to see **list of created dashboards**.
3. Click any of the **listed Dashboard**.
4. Now select **Organisational hierarchy**.
5. **Pick a template** the data you want to view and **Pick a module** and **then pick the activity**.
6. Click **Submit** to view chart or graphs.
7. Click on the **Delete** icon on the top right hand to delete that graph.
8. Click again on **DELETE** for confirmation and the selected graph will be deleted from the dashboard.