

BASIC CACTAS DASHBOARD REPORTS:

Dashboard reports can help managers monitor metrics in graphics of their choosing.

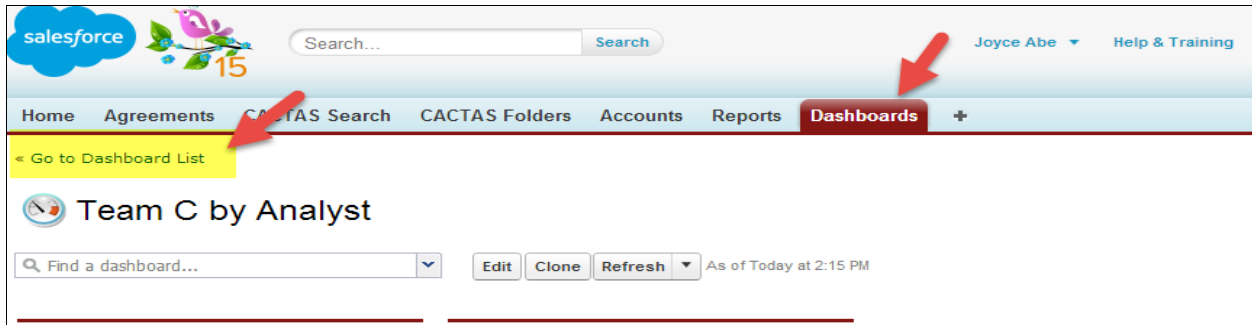
1. First, you must have a report saved that pulls the data that you want to monitor. In this example John developed a report to pull active matters: JOHNS TEST REPORT
2. You can **Summarize (or sort)** information. For example: By RMS Team – if you select **Hide Details**, you will see a selection list by Team :

The screenshot shows the 'JOHNS TEST REPORT' interface. At the top, it says 'Report Generation Status: Complete'. Below that, 'Report Options:' includes a dropdown for 'Summarize information by:' set to 'RMS Team', and a 'Show' dropdown set to 'All agreements'. To the right, a 'Time Frame' section has a 'Date Field' dropdown set to 'Access Date Created' and a 'Range' dropdown set to 'Custom'. At the bottom, there are several buttons: 'Run Report', 'Hide Details' (highlighted with a red arrow), 'Customize', 'Save', 'Save As', 'Delete', 'Printable View', 'Export Details', and 'Subscribe'.

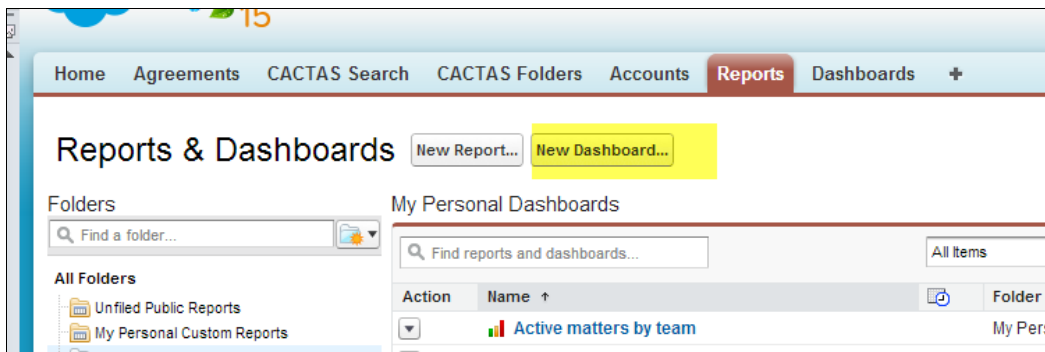
3. Select your team from the list and **Save As** the name of a summary report exclusive to your team. For example, save as: Team A Activity by Primary Analyst/Negotiator.

The screenshot shows the 'JOHNS TEST REPORT' interface with filtered results. The 'Report Options:' section is the same as in the previous screenshot. Below the buttons, there is a 'Filtered By:' section with the following criteria: 'Agreement: Record Type equals C&G', 'AND Action Type not equal to Correspondence,JIT', 'AND Status not equal to Abandoned', 'AND Date Awarded in RAS equals', and 'AND First Received Date greater than 6/1/2010'. Below this, there is a 'Grouped By:' section set to 'RMS Team' and a 'Sorted By:' section set to 'RMS Team'. A list of teams is shown with checkboxes: 'RMS Team: - (109 records)', 'RMS Team: Team A (46 records)' (checked and highlighted), 'RMS Team: Team B (40 records)', 'RMS Team: Team C (39 records)', 'RMS Team: Team D (18 records)', and 'RMS Team: Team E (50 records)'.

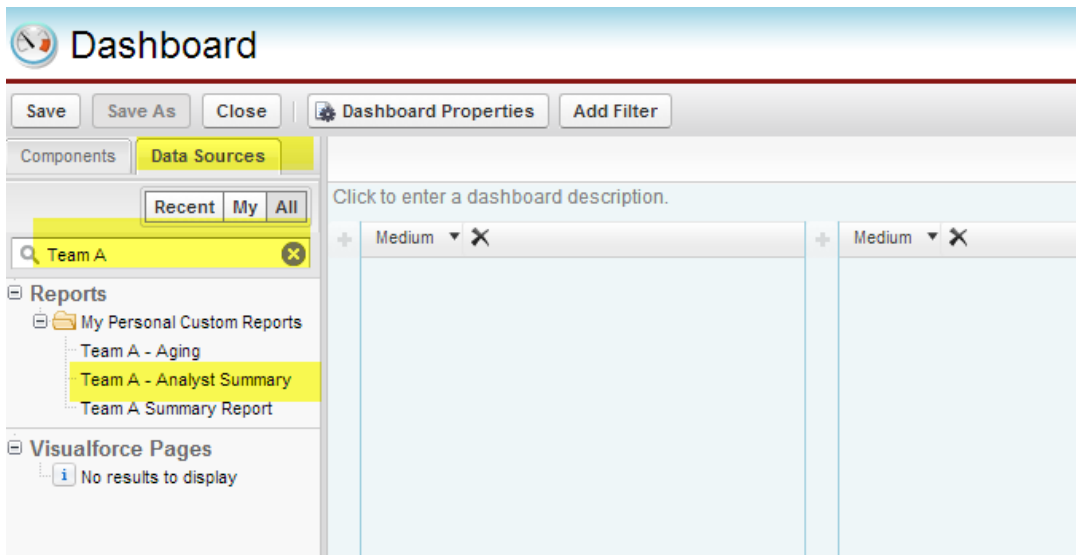
4. Click on the Dashboard tab and select **Go to Dashboard List**:



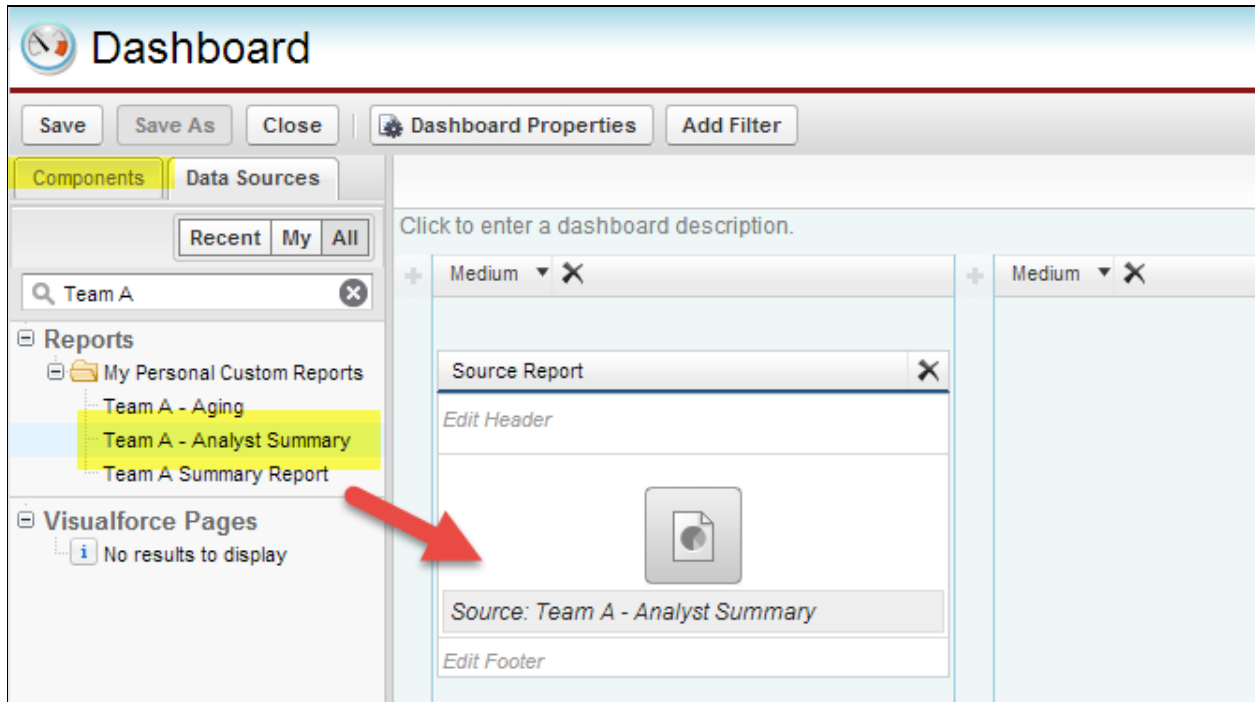
5. Select **New Dashboard**:



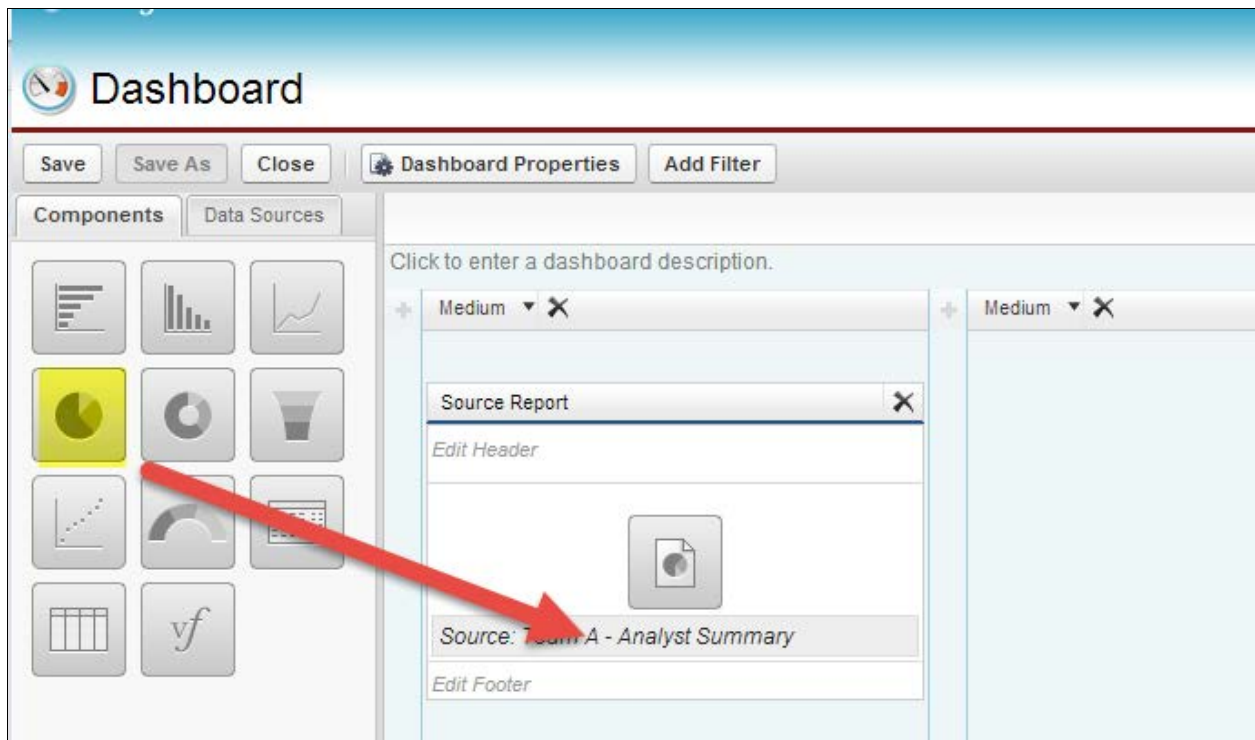
6. Select **Data Source** tab and **search** for your report. Example-Team A-Analyst Summary



7. Drag your report to the medium column, then select the Components tab:



8. Select and Drag the style graphic you want to use to hover over the Source name:



9. **Edit** name field above graphic (ex: Active matters by Analyst), then **select Save**. In the pop-up enter the graphic name as **Title** and then select **Save or Save and Run Dashboard**.

The screenshot shows the dashboard editor interface. At the top, there are buttons for 'Save', 'Save As', 'Close', 'Dashboard Properties', and 'Add Filter'. Below these are 'Components' and 'Data Sources' tabs. The main area displays a pie chart titled 'Active matters by Analyst' with a legend for 'Primary Analyst/Negotiator' including names like Catherine Dunn, Damian Delgado, Karen Vengerow, Marico Moredo, Cynthia Lee, Don Colburn, Kerri Santos, and Michelle Stevens. A 'Save Dashboard' dialog box is open in the foreground, with the 'Title' field set to 'Active matters by analyst' and the 'Folder' dropdown set to 'My Personal Dashboards'. The dialog also includes a warning about sensitive data and buttons for 'Save', 'Save and Run Dashboard', and 'Cancel'.

10. The graphic will remain on your Dashboard for you to run at future dates. To update your metrics, select the **Refresh** button, you can either Refresh Now to instantly update metrics or you can schedule the Refresh to take place at a preset time.

The screenshot shows the dashboard view. At the top, there is a navigation bar with links for 'Home', 'Agreements', 'CACTAS Search', 'CACTAS Folders', 'Accounts', 'Reports', and 'Dashboards'. Below the navigation bar, there is a search bar and a 'Go to Dashboard List' link. The main area displays the 'Active matters by Analyst' graphic, which is a pie chart with a legend for 'Primary Analyst/Negotiator' including names like Catherine Dunn, Damian Delgado, Karen Vengerow, Marico Moredo, Natalie Carver, Other, Cynthia Lee, Don Colburn, Kerri Santos, and Sharon Louie. A 'Refresh' dropdown menu is open, showing options for 'Refresh Now' and 'Schedule Refresh...'. The dashboard also includes a search bar and buttons for 'Edit', 'Clone', and 'Refresh'.