

Section 20

Tina5s User Guide – Dashboards

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Database Version : 2013_02_01_44461

Dashboard Navigation and Settings

Navigation menu: Favorites, Admin, Dashboard

3x3 Menu Item 1: Title: Work Plan, Folder Count: 0, File Count: 0, Size: 0 Bytes, RID: [2542846](#), Created: 06/07/2018

3x3 Menu Item 2: Title: Work Packages, Folder Count: 1, File Count: 0, Size: 0 Bytes, RID: [2501151](#), Created: 28/05/2018

3x3 Menu Item 3: PRJ-0000002, Title: LENS PH2 Gas Plant, RID: [2384783](#), Size: 0 Bytes, Change Information: In Work, Project Effective: Modified: [Mike A](#)

Navigate to the Dashboard View thru the 3x3

In 'My Settings' you can:

1. Switch off the Dashboard feature (if you don't use it). If you do this, it will be removed from the 3x3 and will not be available as a selection on any action menus
2. Set your default landing page to Dashboard

Settings: My Default Settings, My Workflow Templates

Default Language: English (US)

Default Date-Time Format: dd/mm/yyyy

Default Time Zone: (UTC-07:00) Mountain Time (US and Canada)

Show Dashboard: Default Landing Page: [Dashboard](#)

Favorites Page Defaults

Search Defaults

Sync Defaults: When I choose to download from the web, and the f

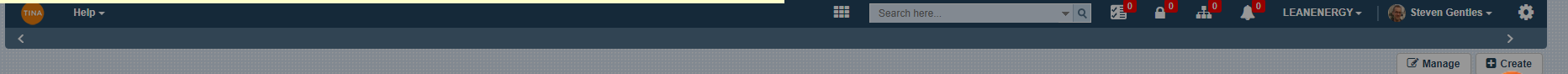
Workflow Defaults: When I add (+) steps to a Workflow, create a new ro

New User Checklist: When I sign in, the New User Checklist pop up will

External Repositories: When searching, include results from all external re

Consider X-Ref: Consider Xref While Downloading, D-link & deleting

Create a New Dashboard Chart



1
Click on 'Create'

3
Choose the document(s) or object(s) that you will be monitoring using a dashboard.
If you choose more than one, a dashboard will be built for each

Choose Records With Trees

General Search All Categories PRJ-0000002

Drag a column and drop it here to group by that column

<input checked="" type="checkbox"/>	Type	RID	Primary Identifier	Version	Lifecycle State	Title
<input checked="" type="checkbox"/>		2384783	PRJ-0000002	0.1.0.0	In Work	LENS PH2 Gas Plant

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Link Link & Close

2
Meaningful dashboards can built based on collections of documents and objects that are 'Treed' to those that you select.
Enter a search term here to find the document (or other object) in Tina that you will be creating a dashboard for.

4
Click on 'Link & Close'

Create a New Dashboard Chart

Clicking on 'Add' will take you back to the search pane where you can choose more to add to your dashboard.

Check the boxes in the grid below and click on 'Remove' if you added some by mistake.

Choose Records With Trees

Add Remove

	Rid	Primary Identifier	Version	Lifecycle State	Title
<input type="checkbox"/>	2384783	PRJ-0000002	0.1.0.0	In Work	LENS PH2 Gas Plant

Next Close



1

Click on 'Next'

Create a New Dashboard Chart

Choose the chart type you'd like to create:

1. **Category & Lifecycle** – bar chart with categories and lifecycles on the x-axis and count on the y-axis
2. **Category and Status** - bar chart with categories and status on the x-axis and count on the y-axis
3. **Create New** – Build your own metadata driven chart

Configure Dashboard Chart

Chart Type

Select Graph Type

Select Graph Type

Category Vs Lifecycle

Category Vs Status

Create New

Save Configuration Create Close

Choose the chart type you would like to create (in this case, we'll create a new one)

Create a New Dashboard Chart

Configure Dashboard Chart

Chart Type: Create New

Category: All Categories

Component: Select Component

- Date (Act-Fin)
- Date (Act-Strt)
- Date (Est-Fin)
- Date (Est-Strt)
- Date (Pln-Fin)
- Date (Pln-Strt)
- Description
- Designated Owner
- Discipline
- Drawing Sheet
- Effective Date
- Issued For
- Lifecycle**
- Locked By
- NOTES
- Plant

All categories are charted by default (to choose specific categories, click on the filter symbol). Each category will be charted as a single bar.

1 Select the metadata component you would like to chart with the categories selected (the component selected will be presented as stacked bars – one bar for each category).

In this example, Lifecycle has been selected.

2 Clicking on the filter icon allows you to choose the lifecycles of interest as well as associated bar colours.

Create a New Dashboard Chart

The screenshot shows a 'Configure Dashboard Chart' window. On the left, a bar chart displays six bars of varying heights and colors (grey and white). On the right, a dropdown menu is open, listing various data sources. The 'Date (Pln-Fin)' option is highlighted in blue. Below the menu are buttons for 'Save Configuration', 'Create', and 'Close'. Two blue callout boxes with white text and orange arrows provide instructions: one points to the 'Select X-Axis' option in the menu, and the other points to the 'Date (Pln-Fin)' option.

1 Click on 'Select X-Axis' to expose the available data sources.

2 Select your X-Axis data source based on available metadata for the categories you selected.

Create a New Dashboard Chart

Configure Dashboard Chart

Set Filter and Configure X-Axis

Specify Dates

Start Date * 01/06/2018

End Date * 30/09/2018

Specify Range

Last Enter text Months

Next Enter text Months

Time Interval

Daily Weekly Monthly Quarterly Yearly

Save & Close Close

2 If you choose a date based data source, specify the range and interval you would like to chart.

1 Click on the filter symbol to configure the X-Axis (information presented will depend on the data source you selected).

3 Click on 'Save & Close'

Create a New Dashboard Chart

Configure Dashboard Chart

Save Configuration

Update Existing Create New

Configuration Name *

Configuration Description

Save Save And Close Close

Chart Type: Create New

Category: [dropdown]

X-Axis: Date (Pin-Fin)

Save Configuration Create Close

2 Dot the 'Update Existing' or 'Create New' as applicable. Provide a name and description.

3 Click on 'Save And Close'

1 If you're planning on applying the configuration you just created on future dashboards, click on 'Save Configuration'

Create a New Dashboard Chart

Configure Dashboard Chart

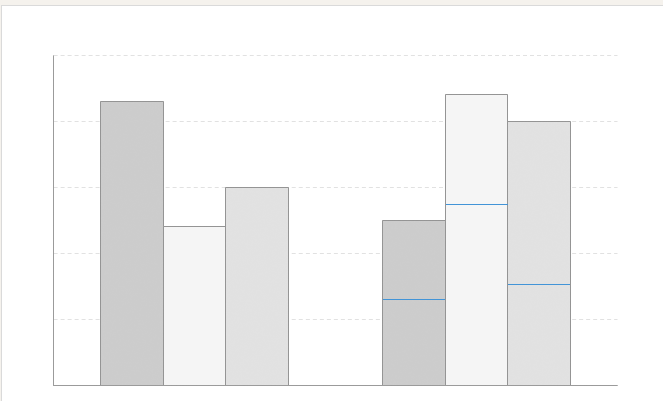


Chart Type: Create New

Category: All Categories

Component: Lifecycle

X-Axis: Date (Pin-Fin)

Save Configuration Create Close



1

Click on 'Create'

Chart Features Summary

Hover over bars to expose component information. Click on a bar stack to filter the results in the Files tab and Latest Discussion tab

Latest Discussion tab provides stream of posts and comments for the collection of documents

Files tab lists all documents that are 'Treed' to the dashboard

Expands chart and grid to fill your monitor.

Removes (deletes) the chart from your dashboard

Launches and presents chart and grid in a new browser tab

Make changes and refinements to the configurations of the chart.



Identifier: PRJ-0000002 Title: S PH2 Gas Plant Category: PWP, X-Axis: July-2018, Component: In Work

Files Latest Discussion

Type	Menu	Lock	RID	Primary Identifier	Version	Title
WIP	☑					Sulpher Conversion System - Inflow Piping System
WIP	☑					Sulphur Conversion System - Outflow Piping System
WIP	☑					Sulphur Conversion System - Lighting System
WIP	☑					Sulphur Conversion System - Circulation Piping
WIP	☑					Sulphur Conversion System - Maintenance Catwalk
WIP	☑					Sulphur Conversion System - Vertical Laddering
WIP	☑		2384902	IWP-01-01-01-001	0.1.0.0	Sulphur Conversion System - Piperack Columns 1-6 Support Structure
WIP	☑		2384903	IWP-01-01-01-002	0.1.0.0	Sulphur Conversion System - Piperack Columns 7-12 Support Structure
WIP	☑		2384904	IWP-01-01-01-003	0.1.0.0	Sulphur Conversion System - Piperack Columns 13-16 Support Structure
WIP	☑		2384905	IWP-01-01-01-004	0.1.0.0	Sulphur Conversion System - Piperack Tray From Column 1 to Column 5
WIP	☑		2384906	IWP-01-01-01-005	0.1.0.0	Sulphur Conversion System - Piperack Tray From Column 6 to Column 11
WIP	☑		2384907	IWP-01-01-01-006	0.1.0.0	Sulphur Conversion System - Piperack Tray From Column 12 to Column 16

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Filter icon shows yellow if you've clicked on one of the bar stacks (click on the filter icon to reset).

Drilling Down and Moving Around

1 Click on any bar in the stack to drill down and filter the results in the grid.

2 To continue drilling down, open the dashboard for the document (this action can be accessed anywhere in Tina where you see the menu icon).

3 The Category Vs Lifecycle chart is the default view (unless you choose another default – see the next slide). Open in a new browser tab to continue exploring, or pin this chart to your dashboard if you'll be monitoring it going forward.

Type	Menu	Lock	RID	Primary Identifier	Version	Title
			2384917	EWP-01-01-04	0.1.6.0	Sulphur Conversion System - Circulation Piping

Category	Count
Completion Testing and Turnover Plan	1
Mechanical Inspection and Testing Plans	1
3D CADD Piping Model	1
General Arrangement Drawings	1
Pipe and Fittings Material Take-Off (MTO)	1
Welding Procedures	2
EWP	1
Non-Destructive Examination Procedure	1
Bolt Torque Specification	1

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Managing & Configuring

Lists all your saved configurations (choose the one you would like to use as a default).

Default and Saved Configurations

Buttons: C, Delete, Rename, Set As Default

<input type="checkbox"/>	Configuration Name	Configuration Description	Is Default
<input type="checkbox"/>	Category & Lifecycle	Category & Lifecycle (In Work & Released) Vs Count	<input checked="" type="checkbox"/>

Configure Chart
Manage Grid Tabs

All your saved configurations are available here.

Configure Dashboard Chart

Chart Type

- Select Graph Type
- Select Graph Type
- Category & Lifecycle (IW & R) Vs Count**
- Category Vs Lifecycle
- Category Vs Status
- Create New

Buttons: Save Configuration, Create, Close