

Section 20

Tina5s User Guide – Dashboards

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Dashboard Navigation and Settings

The screenshot displays the TINA application interface. At the top, there is a navigation bar with a 'Help' dropdown, a search bar, and user information for 'STEVEN GENTLES'. Below the navigation bar, a 3x3 grid of icons is visible, with the 'Dashboard' icon highlighted by a red circle and an orange arrow pointing to it. A blue callout box with the text 'Navigate to the Dashboard View thru the 3x3' and a green circle with the number '1' points to this icon. To the left of the 3x3 grid, there is a 'Favorites' section with a list of items. Below the 3x3 grid, there is a 'My Settings' button. A blue arrow points from this button to a settings window. The settings window has three tabs: 'My Default Settings', 'My Workflow Templates', and 'My Settings'. The 'My Settings' tab is active, showing various configuration options. A yellow callout box points to the 'Show Dashboard' checkbox, which is checked. The 'Default Landing Page' is set to 'Dashboard'.

Navigation Bar:

- Help
- Search here...
- LEANENERGY
- Steven Gentles

3x3 Grid:

- Favorites
- Admin
- Dashboard (Highlighted)

Favorites List:

Title	Folder Count	File Count	Size
Work Plan	0	0	0 Bytes
Work Packages	1	0	0 Bytes
PRJ-0000002	0	0	0 Bytes

My Settings Window:

- 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: ☐ When locking files, automatically link them to my Favorites
- Search Defaults: ☐ When searching, show results from inactive categories
- Sync Defaults: ☒ When I choose to download from the web, and the file is not in my Favorites
- Workflow Defaults: ☒ When I add (+) steps to a Workflow, create a new record
- New User Checklist: ☐ When I sign in, the New User Checklist pop up will appear
- External Repositories: ☒ When searching, include results from all external repositories
- Consider X-Ref: ☐ Consider Xref While Downloading, D-link & deleting

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

Create a New Dashboard Chart

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

1

Click on 'Create'

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'

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

Go To Page: 1 Show Rows: 10 1-1 of 1

Link 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

C

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

TINA Help

1

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

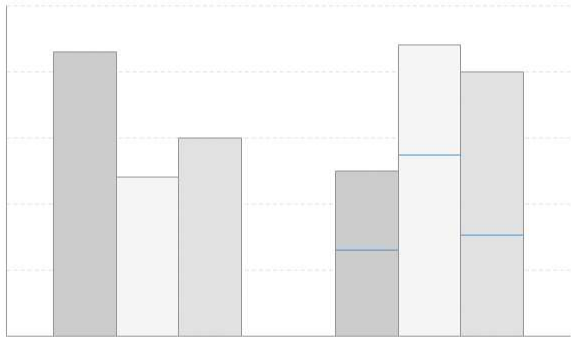


Chart Type

Select Graph Type

Select Graph Type

Category Vs Lifecycle

Category Vs Status

Create New

2

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

Save Configuration Create Close

Create a New Dashboard Chart

LEANNENERGY Steven Gentles

Manage Create

Configure Dashboard Chart

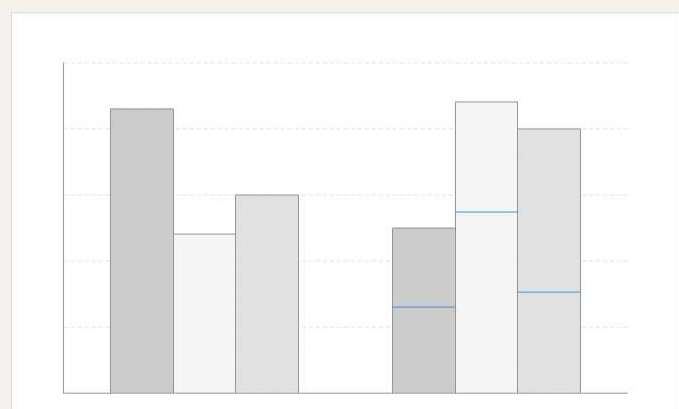


Chart Type
Create New

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 the 'Configure Dashboard Chart' dialog box. The chart area displays a bar chart with six bars. The dropdown menu is open, showing a list of metadata fields. The 'Select XAxis' option is highlighted at the bottom of the list. The callout boxes provide instructions on how to select the X-axis data source.

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.

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

1

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

Create a New Dashboard Chart

The screenshot shows a web application interface with a top navigation bar containing a search bar, user profile, and notification icons. A 'Configure Dashboard Chart' dialog box is open, displaying options for 'Specify Dates' and 'Specify Range'. The 'Specify Dates' section is active, showing 'Start Date' as 01/06/2018 and 'End Date' as 30/09/2018. The 'Specify Range' section has input fields for 'Last' and 'Next' dates, both set to 'Enter text', and a 'Time Interval' section with radio buttons for 'Daily', 'Weekly', 'Monthly' (selected), 'Quarterly', and 'Yearly'. At the bottom of the dialog are 'Save & Close' and 'Close' buttons. Three numbered annotations are present: 1. A green circle with the number '1' and an arrow pointing to the 'Filter' icon in the top right of the dialog box. 2. A green circle with the number '2' and an arrow pointing to the 'Specify Dates' section. 3. A green circle with the number '3' and an arrow pointing to the 'Save & Close' button.

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

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

3 Click on 'Save & Close'

Create a New Dashboard Chart

The screenshot shows a web application interface with a 'Configure Dashboard Chart' dialog box open. The dialog box has a 'Chart Type' dropdown set to 'Create New', a 'Category' dropdown, and a 'X-Axis' dropdown set to 'Date (Pin-Fin)'. A 'Save Configuration' sub-dialog is also open, showing 'Update Existing' and 'Create New' radio buttons, with 'Create New' selected. The 'Configuration Name' field contains 'Category and Lifecycle Timeline' and the 'Configuration Description' field contains 'X-Axis: Category & Lifecycle, Y-Axis: Time'. Three numbered callouts provide instructions: 1. 'If you're planning on applying the configuration you just created on future dashboards, click on 'Save Configuration'' (pointing to the 'Save Configuration' button in the sub-dialog). 2. 'Dot the 'Update Existing' or 'Create New' as applicable. Provide a name and description.' (pointing to the radio buttons and text fields in the sub-dialog). 3. 'Click on 'Save And Close'' (pointing to the 'Save And Close' button in the sub-dialog).

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

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

3
Click on 'Save And Close'

Create a New Dashboard Chart

TINAHelp

Search here...

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Manage

Create

Configure Dashboard Chart

Category	Value
Category 1	85
Category 2	45
Category 3	65
Category 4	35
Category 5	95
Category 6	75

Chart Type

Create New

Category

All Categories

Component

Lifecycle

X- Axis

Date (Pin-Fin)

Save Configuration

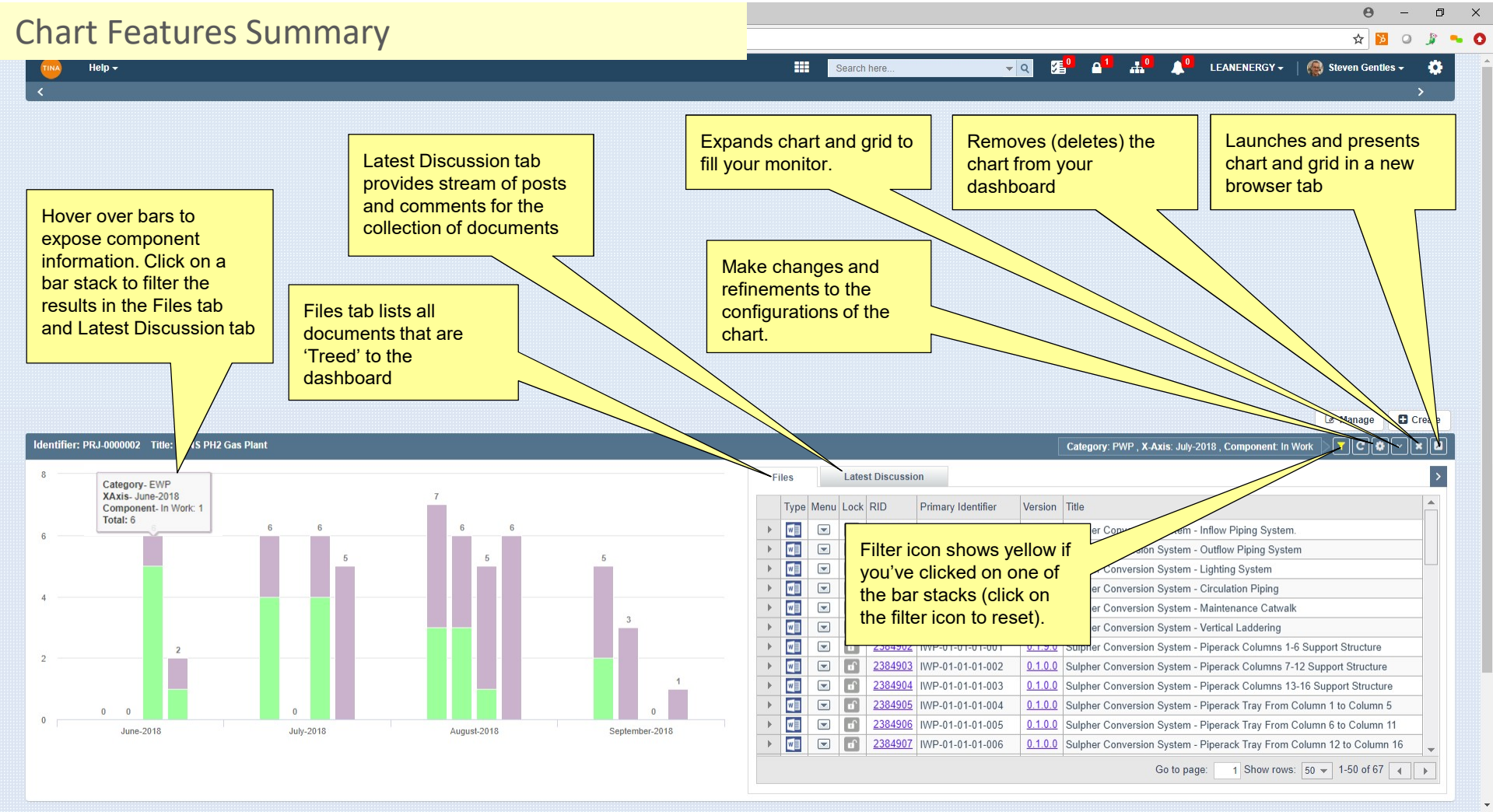
Create

Close

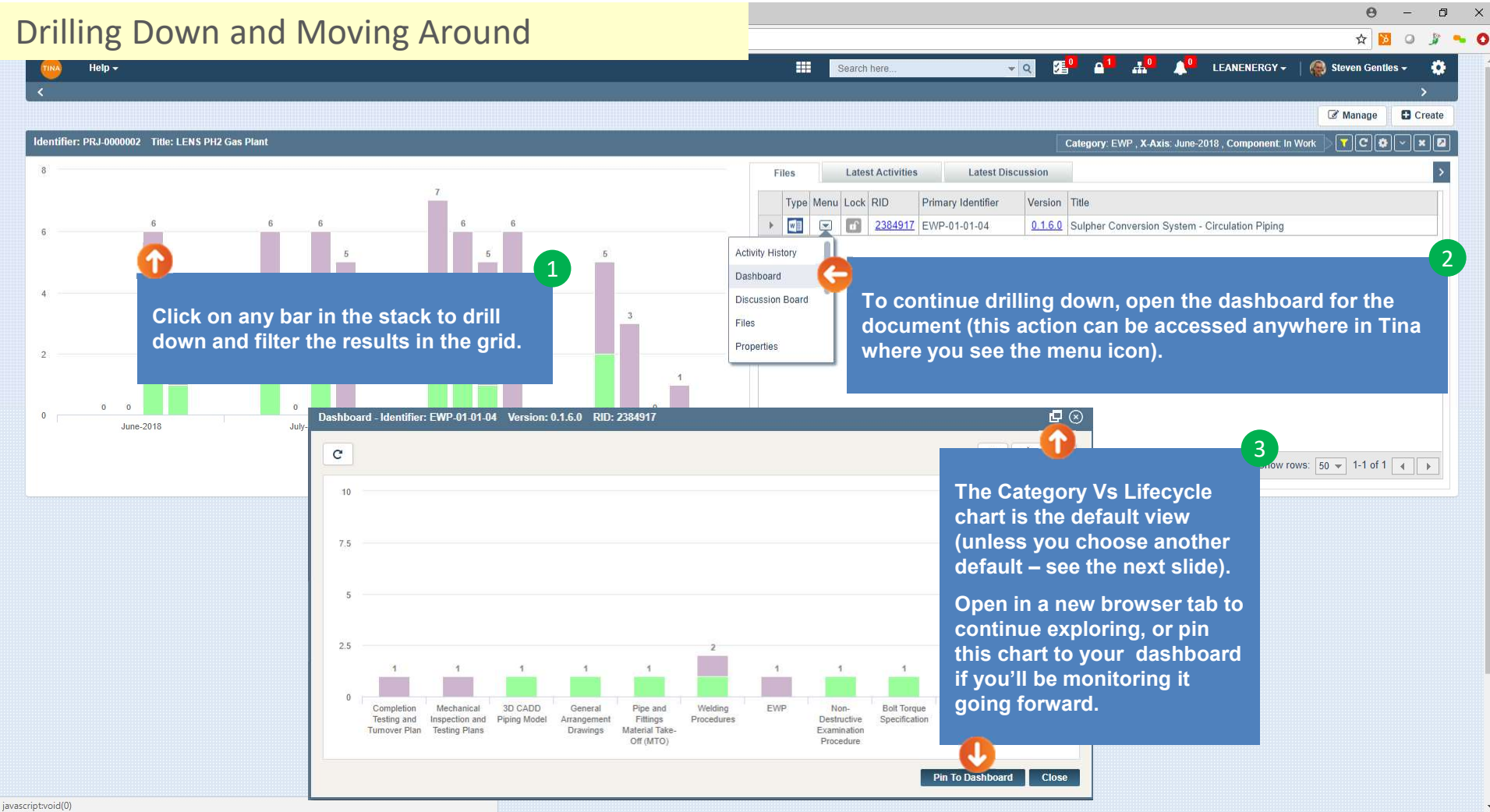
1

Click on 'Create'

Chart Features Summary



Drilling Down and Moving Around



Managing & Configuring

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

Configure Chart

Manage Grid Tabs

Default and Saved Configurations

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

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

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Lock	RID	Primary Identifier	Version	Title
<input checked="" type="checkbox"/>	2397378	PRO-WP-0000003	3.0.0.0	ASTM A572 GR65
<input checked="" type="checkbox"/>	2384917	EWP-01-01-04	0.1.6.0	Sulphur Conversion System - Circulation Piping
<input checked="" type="checkbox"/>	2397596	VDTA-0000007	4.0.0.0	2000 psi x 6- High Pressure Shutoff Valve
<input checked="" type="checkbox"/>	2397592	VDTA-0000003	4.0.0.0	6 Ball Type Check Valve
<input checked="" type="checkbox"/>	2385288	NDEP-0000001	1.0.0.0	Radiography Examination (RT) - 6 x 0.125-0.250 Ferrous Steel
<input checked="" type="checkbox"/>	2385291	TRQ-0000001	1.0.0.0	Bolt Torque Specification (Metric) - Lubricated and Dry
<input checked="" type="checkbox"/>	2397431	DWG-PLP-0000001	3.0.0.0	Sulphur Conversion System General Arrangement
<input checked="" type="checkbox"/>	2385181	MTO-0000001	1.0.0.0	Sulphur Conversion System Circulation Piping MTO
<input checked="" type="checkbox"/>	2385282	DWG-SPL-0000007	1.0.0.0	Circulation Piping - E-12x34'-CA-707-AS
<input checked="" type="checkbox"/>	2385276	DWG-SPL-0000001	1.0.0.0	Circulation Piping - E-2x3'-XS-707-AS
<input checked="" type="checkbox"/>	2385278	DWG-SPL-0000003	1.0.0.0	Circulation Piping - E-20x32'-XM-813-AS