



ATLAS – DYNAMIC REPORT DASHBOARD

ROME MANAGEMENT USER GUIDE



ATLAS – DYNAMIC REPORT DASHBOARD

INTRODUCTION

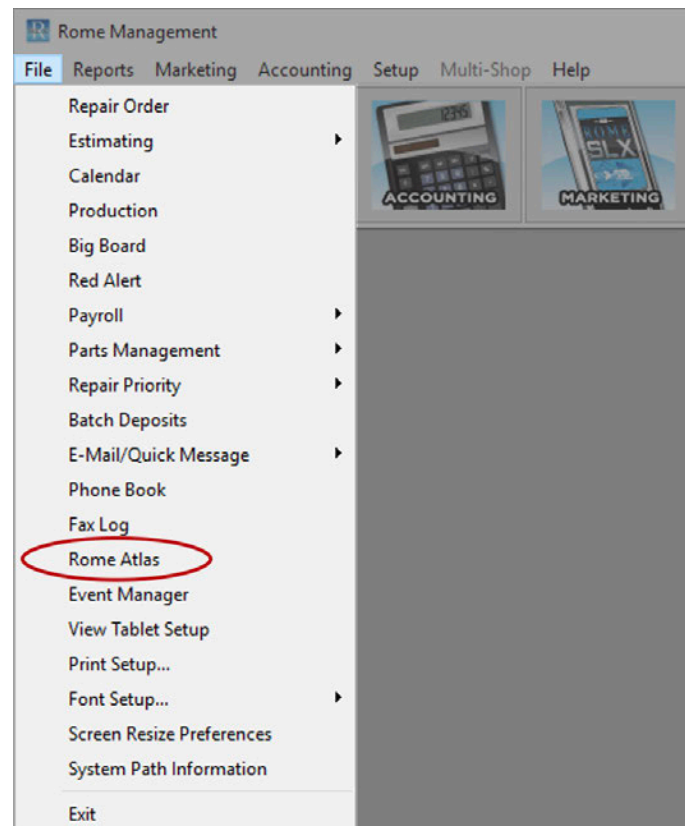
Atlas was created to bring together all reporting aspects of Rome X for managers to see their shops performance. Atlas is a program with management widgets to see shop totals from multiple departments on one screen.

NOTE: Atlas shows the user and the shop name on the dashboard title bar.

ACCESSING THE DASHBOARD

Rome Atlas has two ways to be accessed.

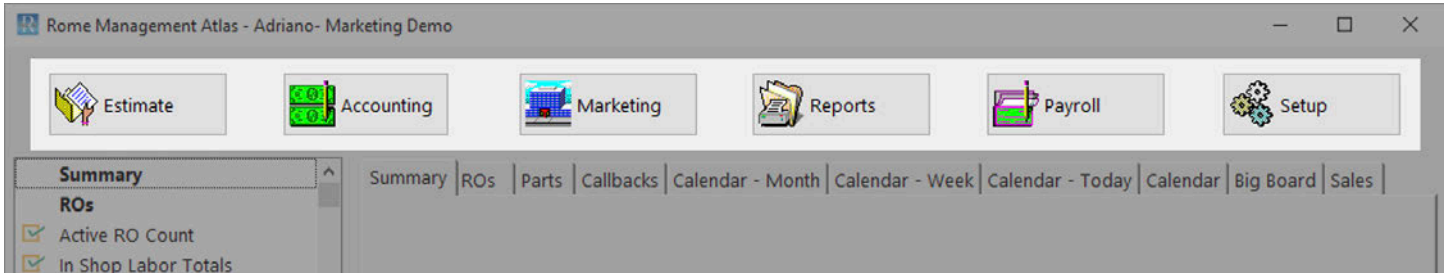
1. Security changes can be made to have Atlas open upon initial login to Rome
2. In Rome Management
 - A. File > Rome Atlas
 - B. This will launch the dashboard directly from your current Rome session.



ROME

BUTTONS

At the top of the Dashboard, you will find several buttons that can take you to different areas in Rome. These are easy access areas that would not open from the widgets in the dashboard.



Estimate - Opens the screen that allows the user to import an estimate into Rome.

Accounting - Launches the accounting interface based on the users DMS preference.

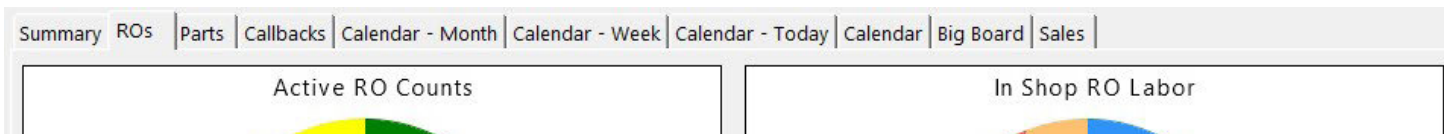
Marketing - Opens the Marketing menu.

Reports - Opens the Reporting Menu with Management and Accounting Reports.

Payroll - Takes the user to the Payroll reports in order to run payroll from the dashboard.

DASHBOARD TABS

Without making any manual report changes, Atlas has standard reports on each tab to help managers understand right away what is happening within their collision center. Every tab breaks down different areas in the body shop.



RO's – Shows active RO counts and In Shop RO Labor

Parts – Shows RO part status

Callback – Shows Customer Contact status

Calendar Month/Week/Today/Overall – shows data broken out by those specific weekly calendar statuses.

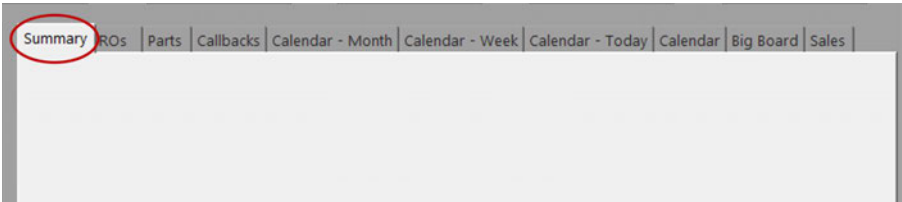
Big Board – Shows Status of all Tasks and if the task is on time or behind.

Sales – Shows MTD YTD and Projected Monthly sales

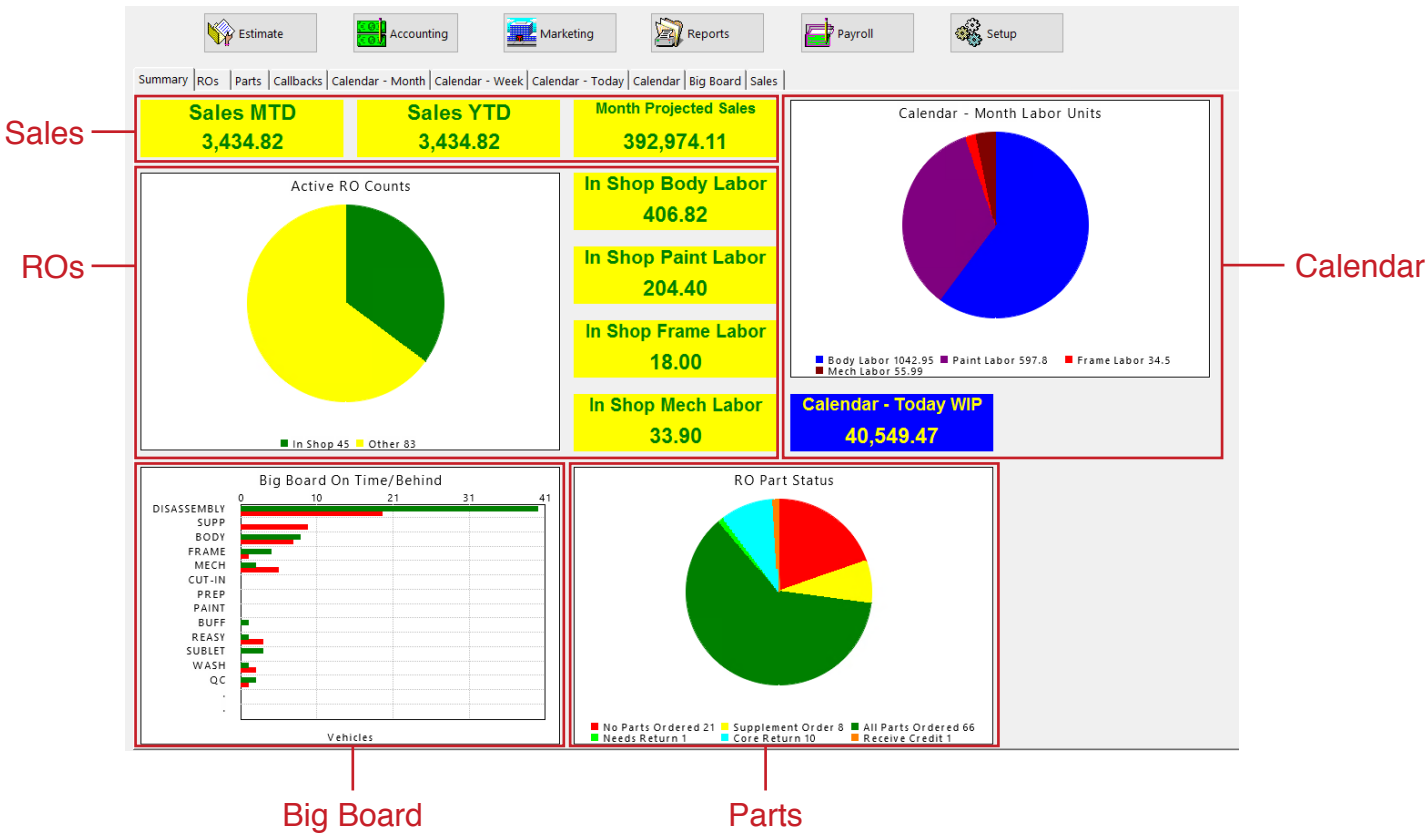
The widget dashboard screen opens in full screen mode.

The first tab is the summary tab.
It is populated by the user based on their preferences.

The entire screen can be resized.



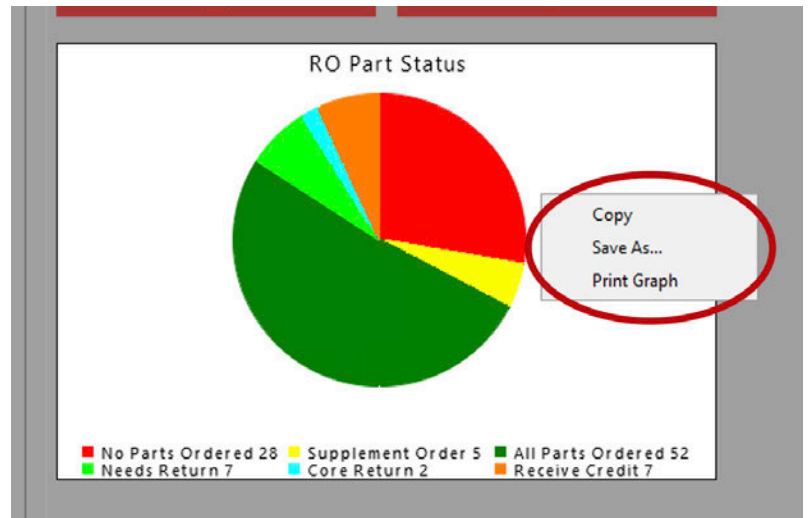
An example of the Summary Tab containing a combination of widgets from different tabs:



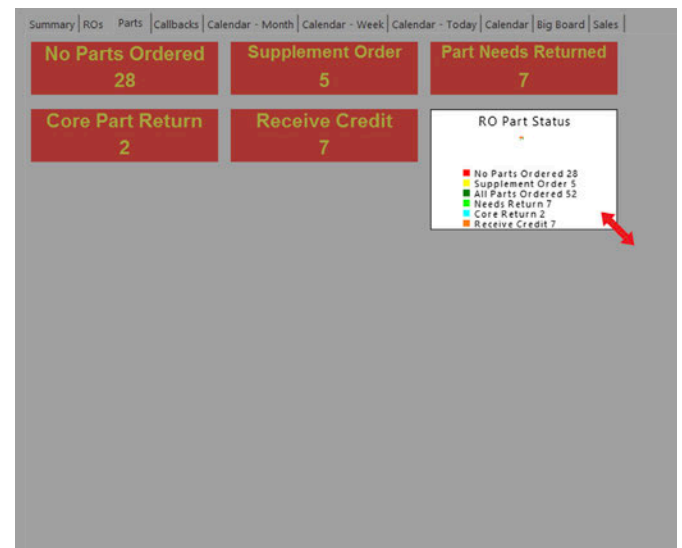
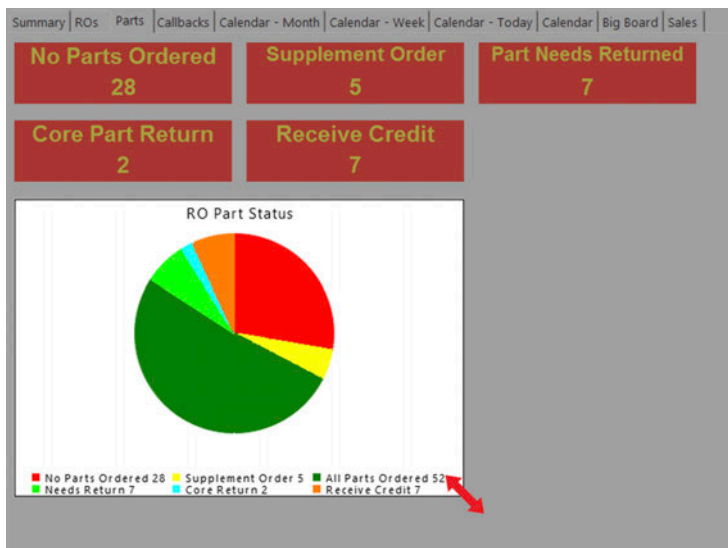
Widgets that are graphs have additional options if you right click on the widget:

1. Copy the graph to the clipboard.
2. Print the graph to the default printer.

Note that this behavior cannot be changed, and that nothing can be added to this printout (it is essentially a screen shot of the widget).

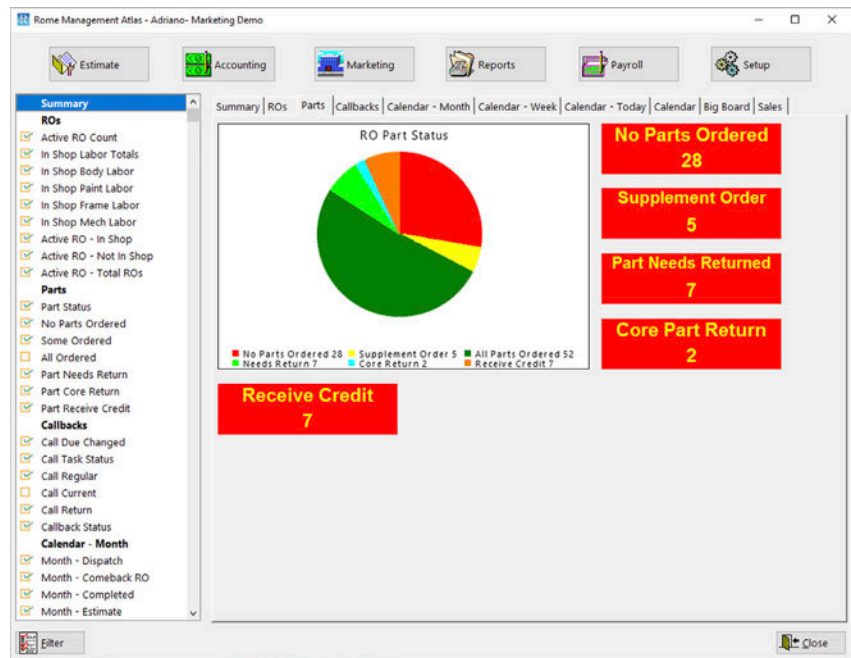


The individual widgets can be resized by dragging the bottom right corner of the widget. The widget size can differ between the summary tab and the tab specific to the widget type. (Also see the “Resize My Widget” feature below.)

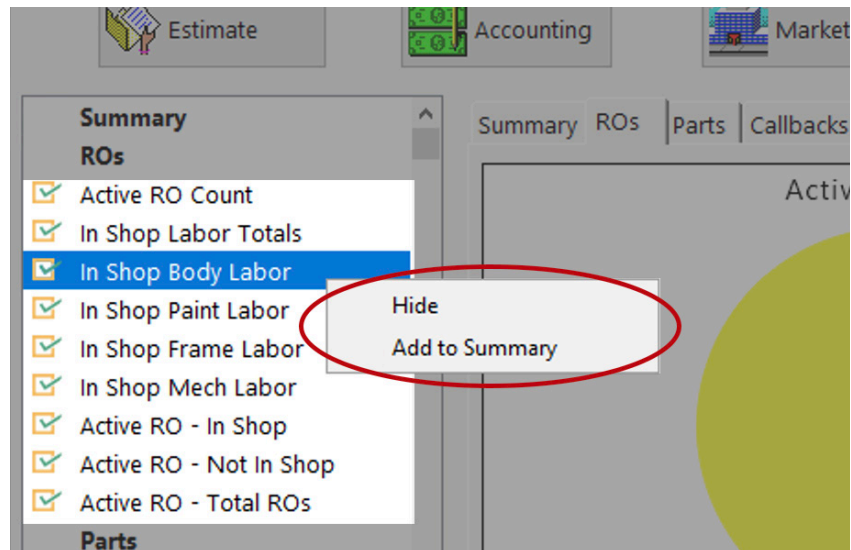


The individual widgets can be re-ordered by dragging them to the order the user wants to see.

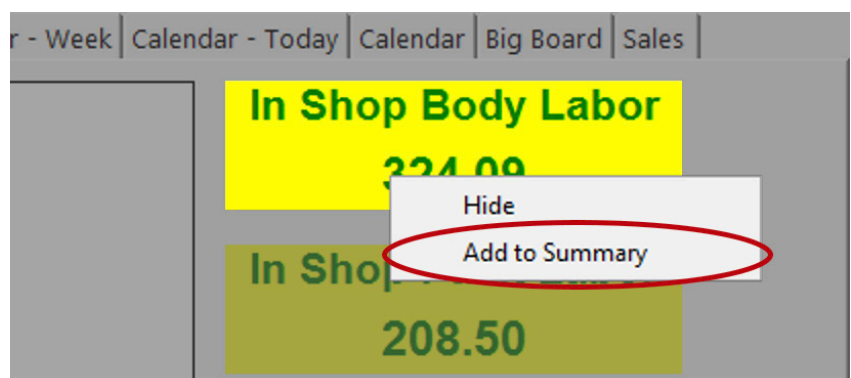
1. We cannot control the initial order of the widgets. The initial position is based on the amount of text in each widget box.
2. The widgets are arranged left to right. They cannot be displayed top to bottom.

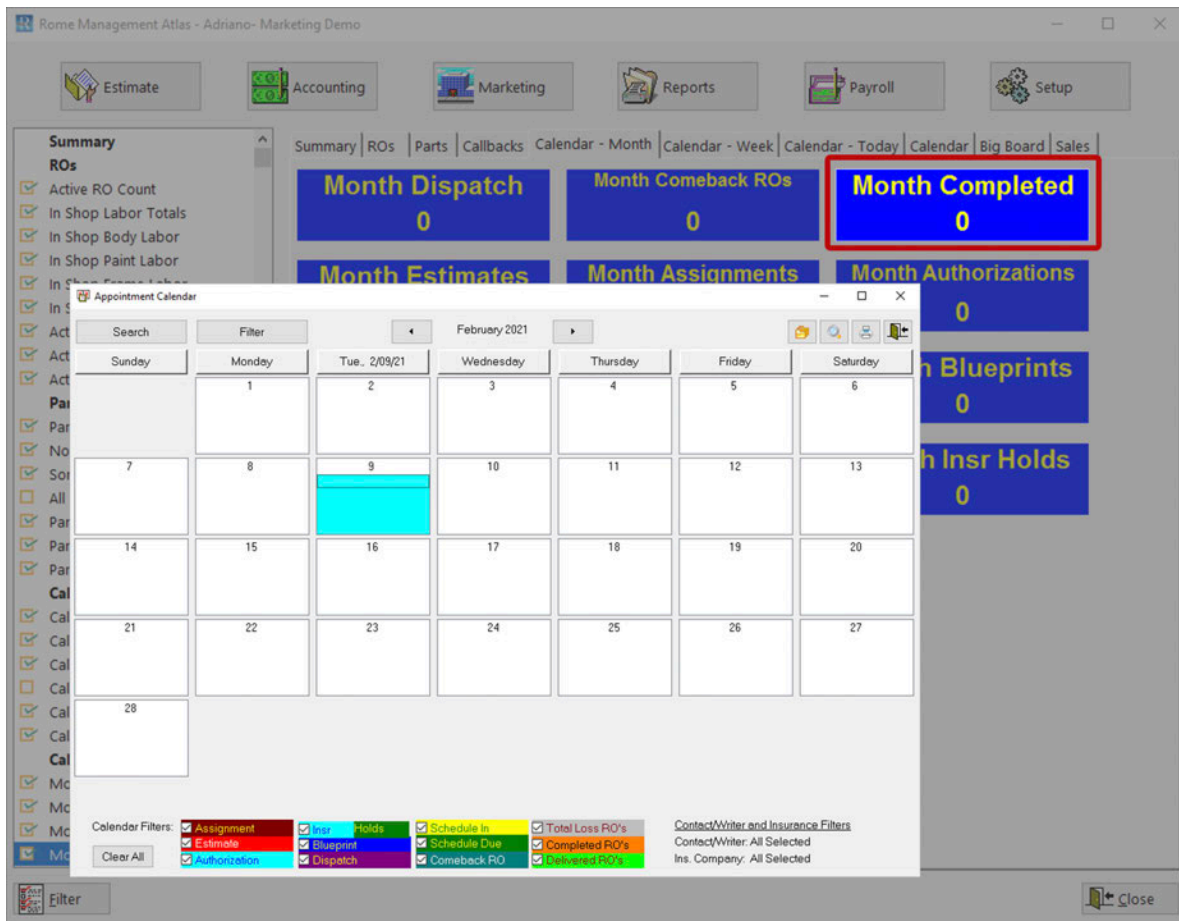


To hide/show a widget on a tab – go to the list display on the left side of the screen and select the widget, and right click. A menu will appear to hide/show the widget on the tab.



To copy a widget to the summary tab – right click on the widget name (list box) and select the option to add the widget to the summary tab.

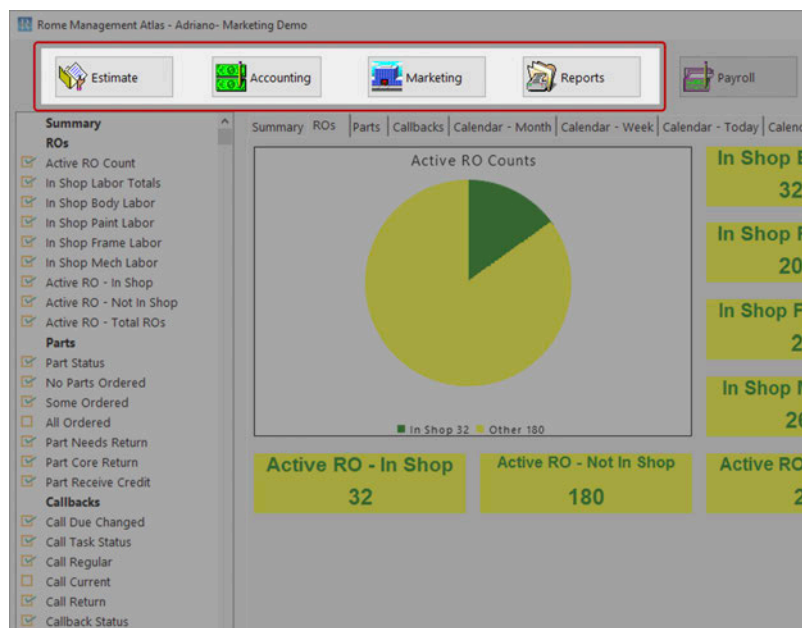


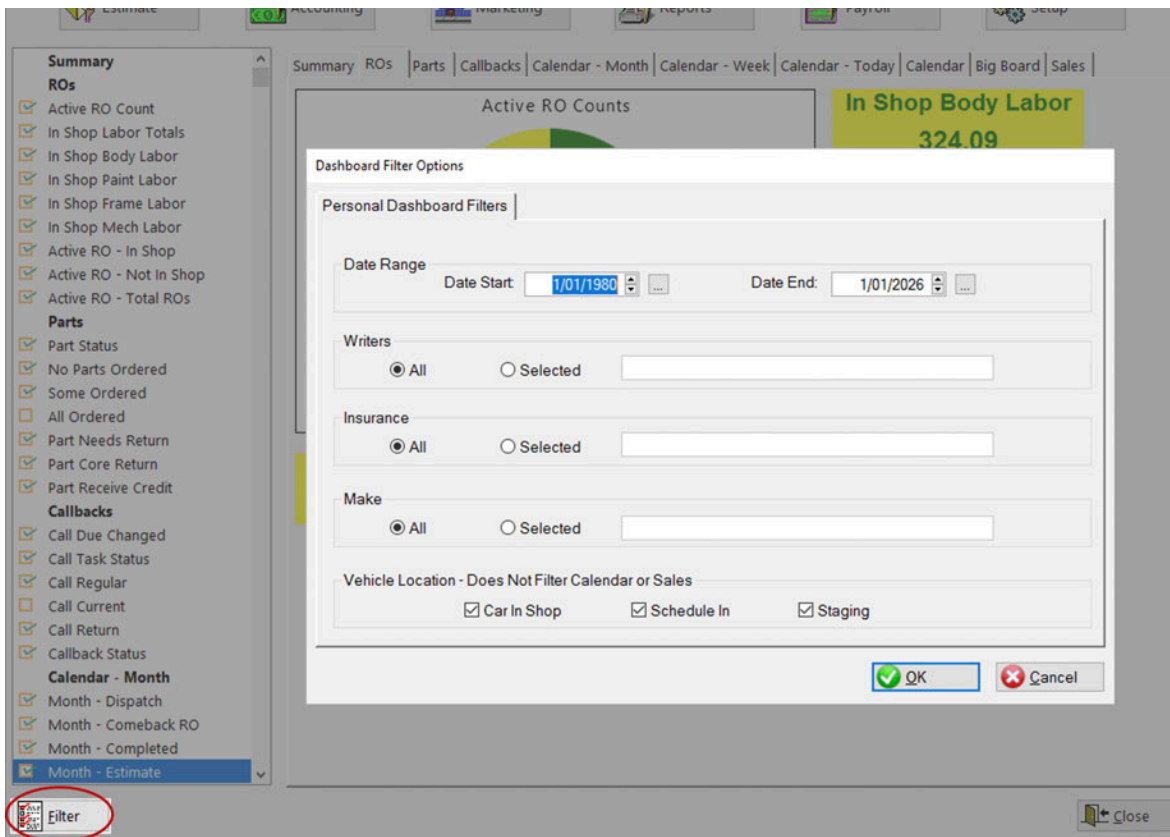


The user can left click on a widget to launch a screen with more detail (e.g. the calendar widgets launch the calendar).

There are four buttons at the top of the dashboard. These buttons launch the same features as the corresponding button in Rome Management (the other buttons available in Rome Management can be launched through widgets).

1. Estimate
2. Accounting
3. Marketing
4. Reports

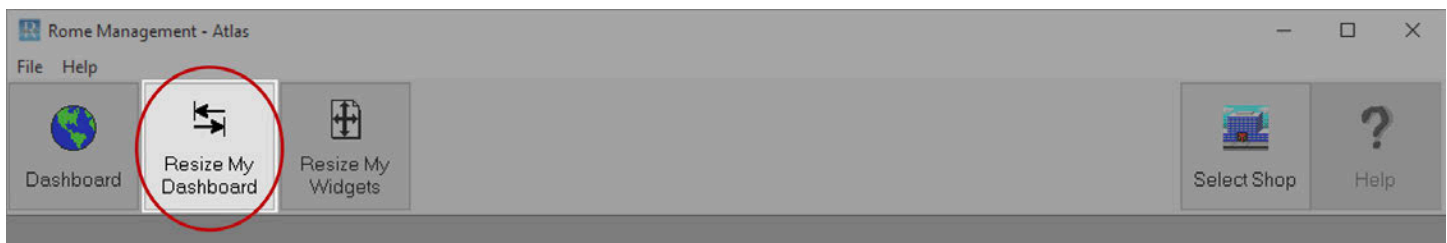




There is a filter button at the bottom left of the dashboard to filter the totals based on writer, insurance company, vehicle make, and other options (this potentially can be expanded).

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Resize My Dashboard: sometimes a widget can disappear from the display if it has accidentally been resized to a very large size. If this happens, the user can close their dashboard and run this utility to resize every widget.



Dashboard Box Size



Select default size for dashboard controls.

Small

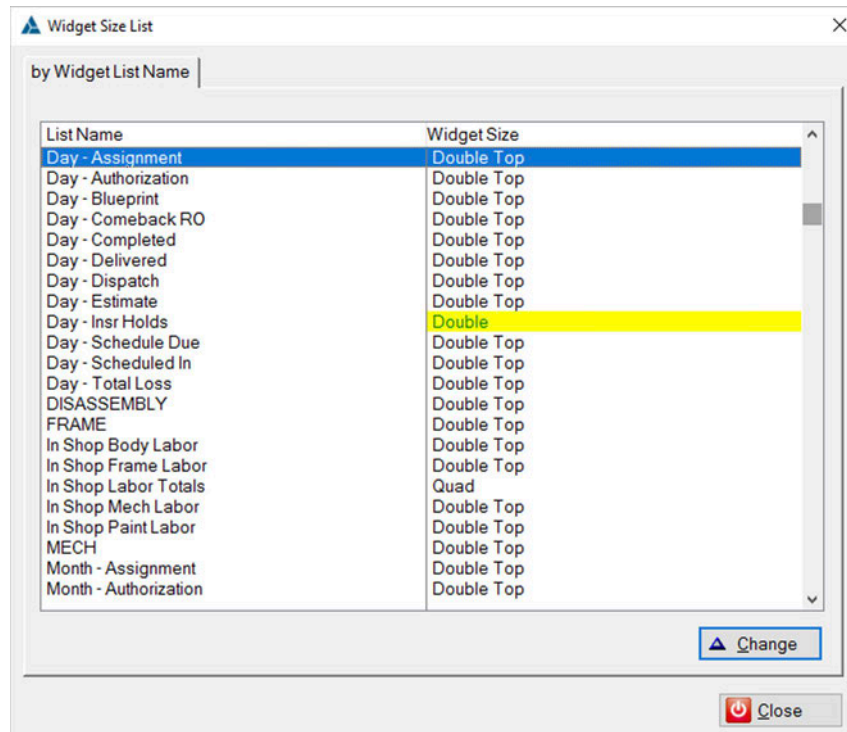
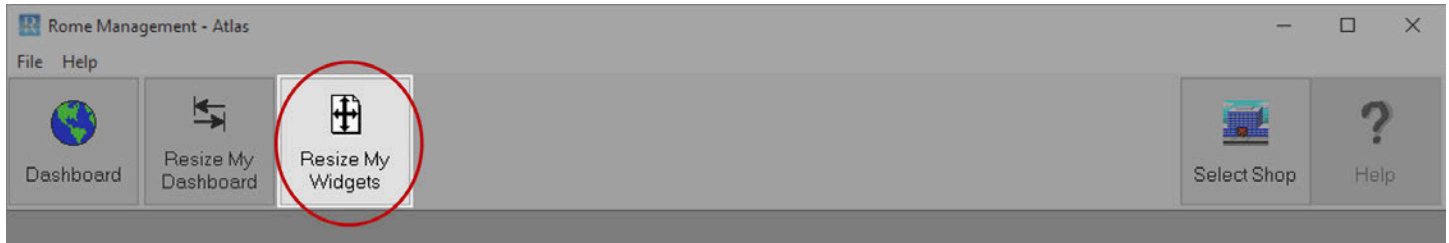
Double Top (Default)

Double Left

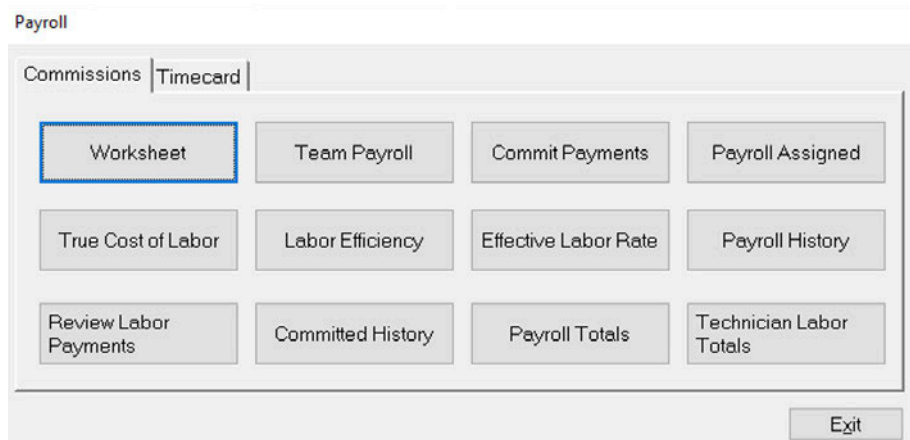
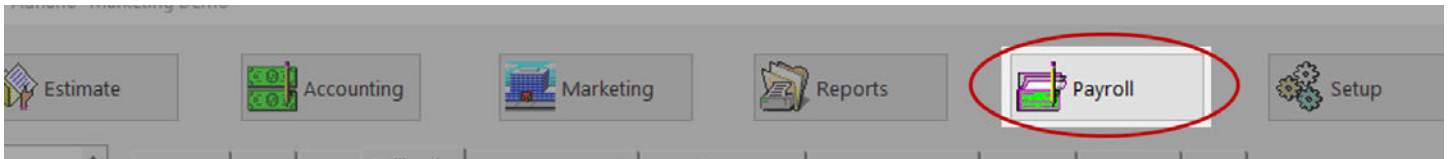
Double

Quad

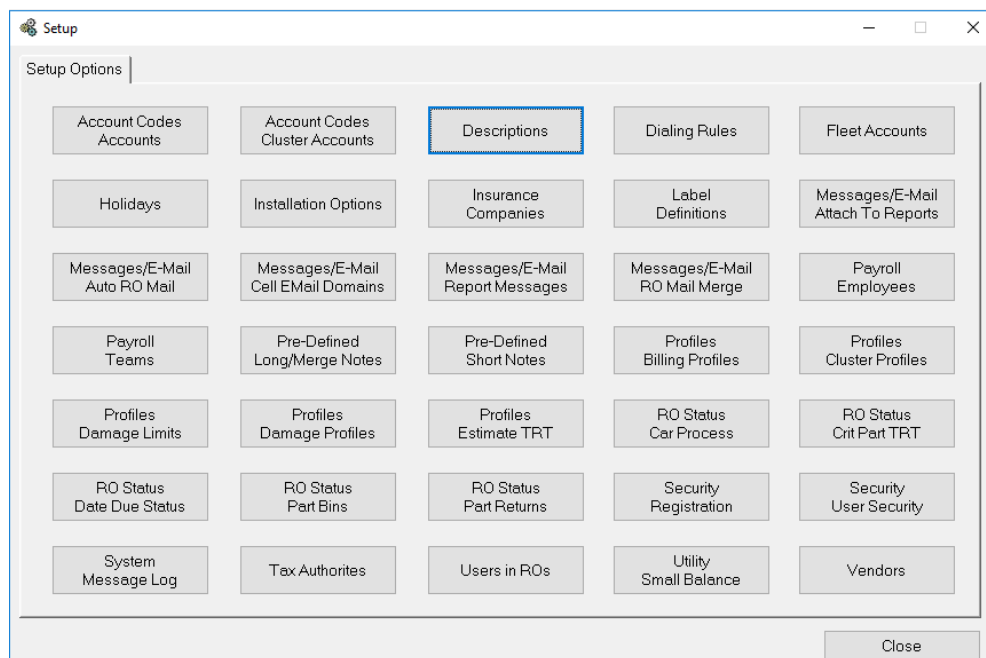
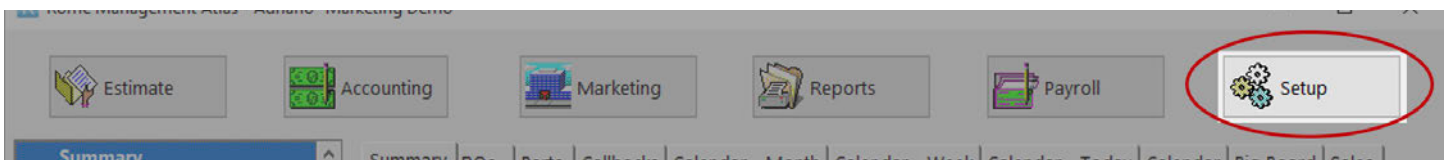
Resize My Widgets: this option allows a user to resize a single widget. If a widget is not the default size, it will be highlighted in yellow.



Management features allowed in the dashboard also include payroll so there is no need to leave Atlas to run your payroll reports.



There is also a Setup button on the top of the dashboard that allows access to the setup menu options in Rome Management.



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