VUE DMS

ADDING *TODAY'S ONE LINE SERVICE RO'S TO* YOUR DASHBOARD

Follow the steps below to create a visual report graphic showing the current day's One-Line Service RO's.

Start by clicking on the Dominion VUE logo. From the home page, select an existing Dashboard by clicking on the far-right caret next to Unassigned Reports (or the current Dashboard name), or create a new Dashboard by clicking [**New**] and entering a name and click [**Create**].
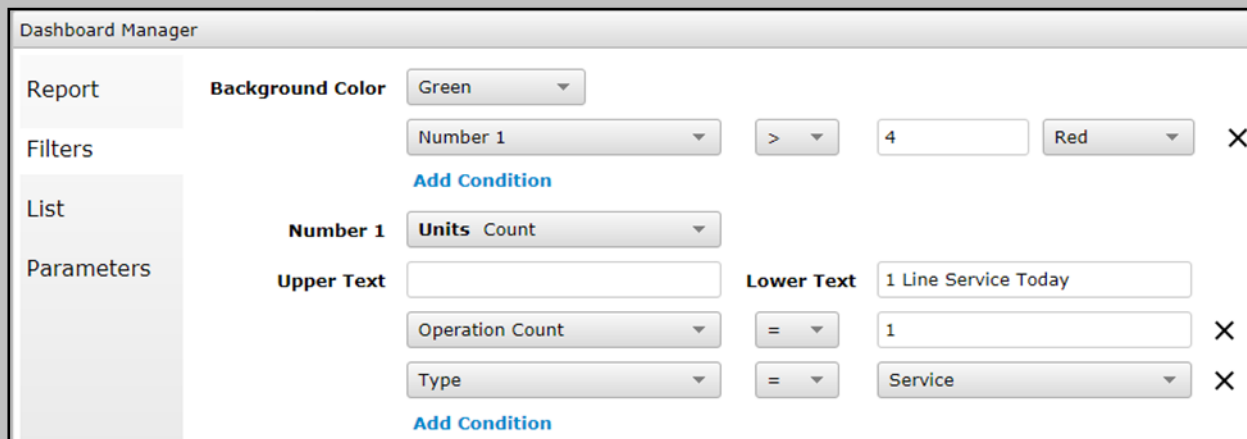
Click the [**Add Report**] button in the Action Ribbon.

ON THE **REPORT** TAB

1. **Report Basis** - Select [Service Repair Orders]
2. **Report Title** - "Today's 1 Line Service RO's"
3. **Default View** - Number

ON THE **FILTERS** TAB

1. Set **Background Color** - Green
2. Click [**Add Condition**]
3. Set [**Number 1**] [**>**] [4 or amount] [**Red**]
4. Specify **Number 1** as [**Units Percentage**]
5. Leave **Upper Text** Blank **Lower Text** "1 Line Service Today"

6. Click [**Add Condition**]
7. [**Operation Count**] [**=**] [**1**]
8. Click [**Add Condition**]
9. [**Type**] [**=**] [**Service**]

Dashboard Manager

Report	Background Color	Green
Filters		Number 1	>	4	Red	X
List		Add Condition
Parameters	Number 1	Units Count
	Upper Text		Lower Text	1 Line Service Today
		Operation Count	=	1	X
		Type	=	Service	X
		Add Condition

ON THE **PARAMETERS** TAB

1. **Report Title** [Today's 1 Line Service RO's]
2. **Companies** [Select Companies to include]
3. **Advisor** [All or select individual]
4. **Open Status** [All]

5. **Based On** [Open Date]
6. **Date Type** [Preset Date Range]
7. **Date Range** [Today]

Click [**Save**]

Each Dashboard Report may be edited by clicking on the three ellipses in the upper right corner and clicking on Settings. Contact Customer Support for more details to create personalized Dashboards.
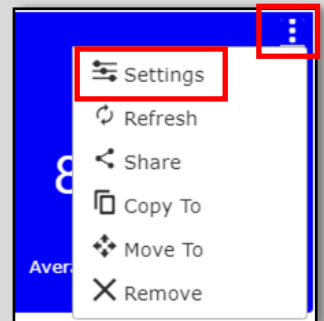
For Technical Support, please contact: 1.800.227.8187 or email dmssupport@dominiondms.com