Pulse Dashboard Save and Share and Publish

Sometimes the User will change an existing or create a new Report or Tab in Pulse Dashboard and would like to share this with another User(s). This sharing is done by using either Save and Share on a Pulse Report or Tab to allow the other User(s) to add this to their screens. Additionally, the Publish functionality is also available for the Tab so that other users get the modified screen. Tabs may be Published or selected for Save and Share while Reports may use Save and Share.

Save and Share allows you to create a "library" for shared Tabs, Boxes, Filters, etc. that other users may access (if they have permissions) and add that Shared "article" to their screen when and if they want.

The Publish capability is at the Tab level and instead of building a "library" to draw from, the Publish utility immediately adds a Tab to another Users screen and the User will see it the next time that they log into Pulse Dashboard.
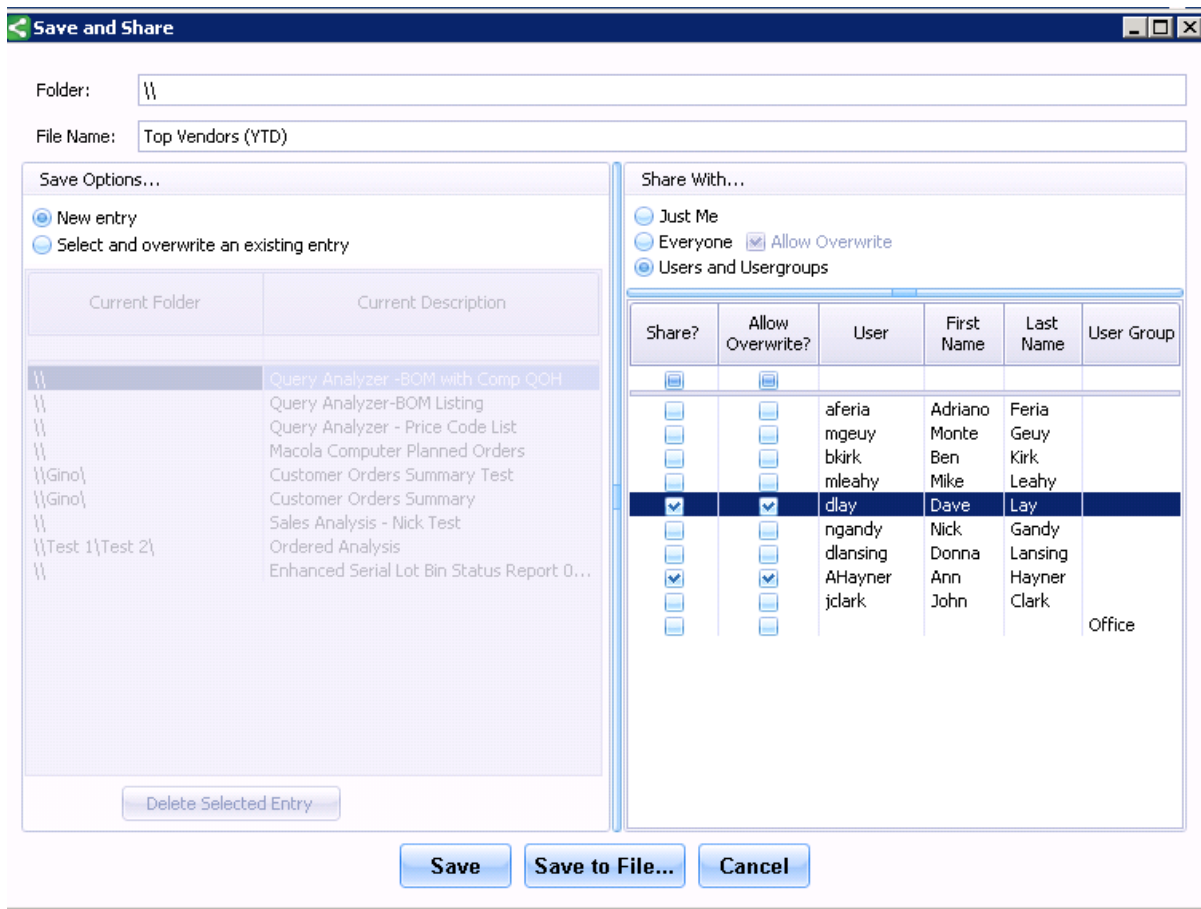
Save and Share

If an existing Report is modified and needs to be shared with another user, move the cursor to the heading of the modified Report, right click and select Save and Share Report. A screen will appear that will allow the Report to be saved or "checked into" the library.

Use the "Share With.." section of the screen to specify if this Report is to be shared with just the user creating the Report, Everyone or specific Users or User Groups. The information will be stored in the database and be available to those selected when Adding a Shared Report.

The Overwrite functionality allows the User, when adding the Report or Tab to update or overwrite an existing Tab or Report on their screen if the report has the same name. Not allowing for overwrite will not change an existing Report or Tab but will add a new additional Report or Tab with the same name.

If there is a need to export this Report or Tab to an external File in order to transport it to a different database using the Save To File…. Button at the bottom of the screen will allow the User to do this. An Explorer screen will open and the Report will be exported to a ".pbox" file and a Tab will be exported to a ".ptab" file.

Save and Share

Folder: \\

File Name: Top Vendors (YTD)

Save Options...

- ( ) New entry
- ( ) Select and overwrite an existing entry

Current Folder	Current Description
\\	Query Analyzer -BOM with Comp QOH
\\	Query Analyzer-BOM Listing
\\	Query Analyzer - Price Code List
\\	Macola Computer Planned Orders
\\Gino\	Customer Orders Summary Test
\\Gino\	Customer Orders Summary
\\	Sales Analysis - Nick Test
\\Test 1\Test 2\	Ordered Analysis
\\	Enhanced Serial Lot Bin Status Report 0...

Delete Selected Entry

Share With...

- ( ) Just Me
- ( ) Everyone [x] Allow Overwrite
- ( ) Users and Usergroups

| Share?	Allow Overwrite?	User	First Name	Last Name	User Group
[ ]	[ ]				
[ ]	[ ]	aferia	Adriano	Feria	
[ ]	[ ]	mgeuy	Monte	Geuy	
[ ]	[ ]	bkirk	Ben	Kirk	
[ ]	[ ]	mleahy	Mike	Leahy	
[x]	[x]	dlay	Dave	Lay	
[ ]	[ ]	ngandy	Nick	Gandy	
[ ]	[ ]	dlansing	Donna	Lansing	
[x]	[x]	AHayner	Ann	Hayner	
[ ]	[ ]	jclark	John	Clark	
[ ]	[ ]				Office

Save   Save to File...   Cancel

To add a Save and Share Report to a Tab for the other User, the User will move to a Tab where the new Report needs to be added. Moving the cursor to an empty spot on the tab where the box is to be inserted (outside of another box). Right click and Add Shared Report. This will add the selected Report to the screen. If this is to replace a similar box on the screen. If this Report is from an External File use the Load From File option when doing the rt-click on the Tab.

Tabs may also be Shared in a similar fashion by rt-click on the Tab header and select Save and Share Tab. The Tab may then be added to the new user by using the small down-arrow (v) on right hand side of the tab line of the screen and selecting it from the list of available articles listed. Saving or Adding to/from an External File for Tabs is similar functionality to the Reports. The receiving User must have access rights to that type of report as defined in User Control.

Publishing

Using the Publish application is a simpler process. Make the changes to the Tab that has been created and rt-click on the Tab heading and select Publish Tab and select the Users from the list that will have the new tab added to their screen. There is no "library" involved with this functionality although the User must have User permissions to use this functionality and the receiving User must have access rights to that type of report as defined in User Control.
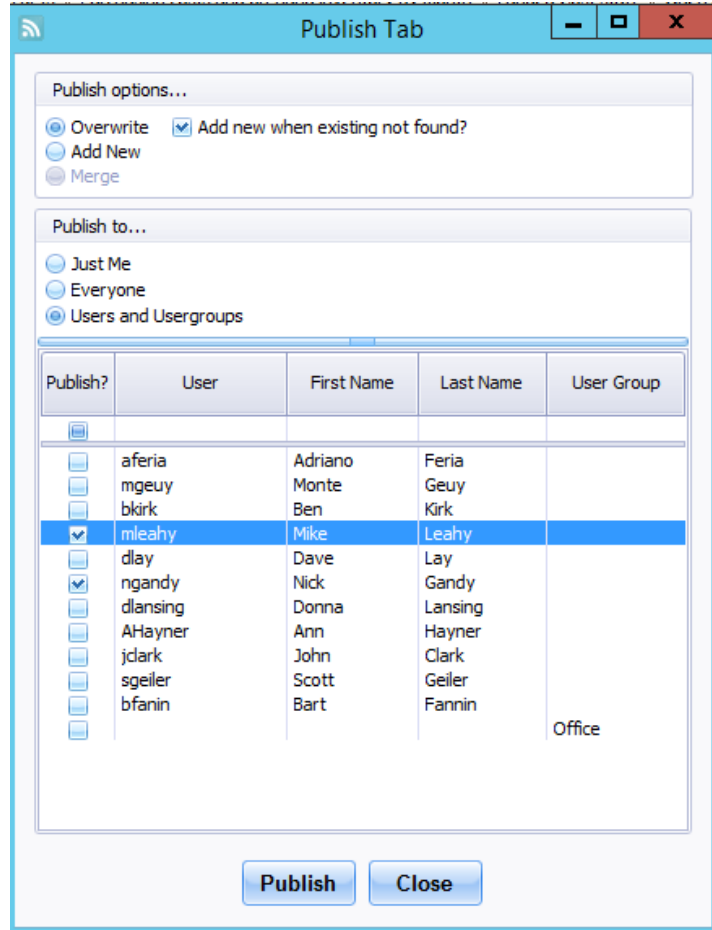
Please call our PULSE support desk us with questions and comments at
(513) 723-8095 or Support@PULSEDashboard.com

We encourage phone calls with suggestions for making our software function better for your organization. We also offer custom modifications, and if your suggestion is applicable to other users, it may be made at no charge.

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