PULSE Dashboard Administrator Guide

(Updated 12/20)

All functions described in this document may be performed from a workstation on the network with the exception of Updating the Pulse Dashboard Software which must be run from the SQL Server where the software is installed. Some sections of this training material may be demonstrated during the training class and some sections are for your reference. Not all functionality described in this document is available for all ERP systems. Some of the more advanced features of Pulse Dashboard are not described here but is available from Pulse Support. Feel free to call our support desk at (513) 723-8095 or email Support@PulseDashboard.com with any questions.

Getting started with PULSE Dashboard

1. You may feel overwhelmed with your data and see data that needs to be corrected.
2. Spend 15 minutes a day for a few weeks getting comfortable with the screens.
3. Pinpoint the top 10 screens you want to start using in your job.
4. Contact us with any time you have questions or enhancement suggestions.

Obtaining technical support

- You have unlimited phone/e-mail support and training with PULSE Dashboard.
- Direct Phone (513) 723-8095.
- To send e-mail messages: Go to >Help Menu>About> Click Support@PulseDashboard.com.

Starting Pulse Dashboard

1. Start Pulse Dashboard from any workstation or the server by selecting the Desktop icon or using the Windows Explorer to find PulseDashboardClient.exe to start the software.

2. If starting Pulse Dashboard from the Server a message may appear that User "Administrator" (or the User that you have logged in to the Server as) is not authorized to use Pulse Dashboard. This is probable and normal as this User Name may not have been added to the Users in Pulse Dashboard and does not need to be. Acknowledge the message to clear it.

   Enable the Administrator Mode (if not already enabled the User Control button will be visible on the right of the screen) on the Administration Menu at the top of the screen, select **Enable Administration Mode** and enter the Admin Password when prompted. The default was given to your company during installation but is may have been changed. If the Default has been changed Pulse Tech Support will not have this new password but may reset it to the Default if necessary.

User Control

The Dashboard & Reporting User Control button is used by the Administrator to add, change and delete users. Each User can have different access rights for each module and reports within the modules of Pulse Dashboard.

Add a New User to Pulse Dashboard

1. Use the User Control Button on the right side of the screen to access User Setup information.

2. On the left side of the User Control screen, select the User from the dropdown field at the top just to the left of the Add button and then click Add. (If the User is not available in the list, they may need to be entered using the Manual Entry available from the Add button). Fill in their First and Last Name and add them to a User Group (see below) if needed. Select if they may use the Publish function and are to be an Admin User.

   The Publisher function allows the user to create and publish tabs containing one or more reports to other Users. The Publisher feature is different than the Save and Share function in that it directly adds tabs to the screens of other Users instead of having the User manually add a Shared tab to their screens.

   The Admin selection, in addition to all capabilities of a normal user, allows access to the Administration Menu and the rights to run all applications controlling global settings including:

   - Calendar definition
   - MRP dates
   - Changing default screen settings
   - Updates for Dashboard software and license
   - Changing the Administrator password
   - Changing field names in the Column Chooser

There may be more than one Administrator but at least one user must have this ability. Users with Administrator rights may perform special functions in the software. These include deciding global settings and setting the "rules" for using the software. Although not required it is usually best to have at least two users with Administrator privileges as this increases the availability of someone to make changes when needed. (See Administrator Mode below)

3. On the right side of the screen, select the modules the User will have access to. Within each module (click the + sign) also select the reports that the User may access.

   The Edit Settings selection will allow the user to add this report to their screens and make changes to this report (red wrench set-up icon). If Edit Settings is not selected, the user will not be able to add that particular report. The user does have the ability to add a shared report of that type if it has been shared with them.

   The Change Filter checkbox will allow the user to add/change/delete filters on that report when setup using the "funnel" icon in the upper right of the report.

   * See User Security Table in the Appendix at the end of this document to assist in adding Users

4. At the bottom left of the screen are two buttons. The Copy User Settings and the Paste User Settings buttons will allow copying all of the Tabs and Reports from one User to another User. Select a User from the left side of the screen and Copy User Settings. This will copy all of the settings to the clipboard. By then selecting a different User and using the Paste User Settings button all Tabs and Reports rights from the first User will be pasted into the Tabs and Reports of the new User.

5. At the bottom right of the screen are two buttons. The Copy User Security and the Paste User Security buttons will allow copying all of the access rights shown from one User to another User. Select a User from the left side of the screen and Copy User Security. This will copy all of the settings to the clipboard. By then selecting a different User and using the Paste User Security button all access to Modules, Reports and G/L Account rights from the first User will be pasted into the Modules, Report and G/L Accounts of the new User.

6. At the top of the screen will be a Lock All User Settings checkbox. If selected the User will not have access to the Executive or Settings Menus at the top of the screen or the Settings icon or Filter icon on each report header. Changes to those settings will not be allowed by those Users.

7. If the User will access the Financial Module or the Current Balances Report or G/L Control Report in the Executive Module, use the G/L Account Security button to add the Accounts they will have access to and Click OK. (Macola® Only)

8. If the User will need a Password to enter Pulse Dashboard, add this in the Password field at the top of the page.

9. When all has been completed, click Save at the bottom of the User Control screen.

Add a New User Group to Pulse Dashboard

1. On the left side of the User Control screen, select the User Group tab at the top of the screen and select Create New User Group. Add the User Group Description and select Add. On the right side of the screen select the modules that the Users assigned to this Group will have access to within each module (click the + sign) and select the reports that the Users will have access to. If a User is assigned to a User Group, the settings of the Group will take precedence over any access rights assigned to the individual.

Add Pulse Dashboard to a Workstation

1. From the Workstation Use the Windows Explorer and navigate to the Server where the Pulse Dashboard Folder has been installed.

2. In the Pulse Dashboard folder find **PulseDashboard*Client*.exe**, rt-click on it and select **Send To** and **Desktop**. ***Do not select Pulse Dashboard.exe; always select the Client program from the network when setting up a Workstation. Do not select Pulse Dashboard.exe or Pulse Dashboard Client.exe if found on the local C:\ drive of the workstation as this will cause errors and confusion. Do not "pin" the Pulse Dashboard.exe program to the Windows Task Bar as it will create problems when Updating the software.***

View User Activity Log

1. On the left side of the User Control screen is a pushbutton that will display the User Activity in Pulse Dashboard for each User. This will allow the Administrator to see the activity for each User in Pulse Dashboard and allow the Administrator to monitor the use of Pulse Dashboard for the Users.

Administrator Mode

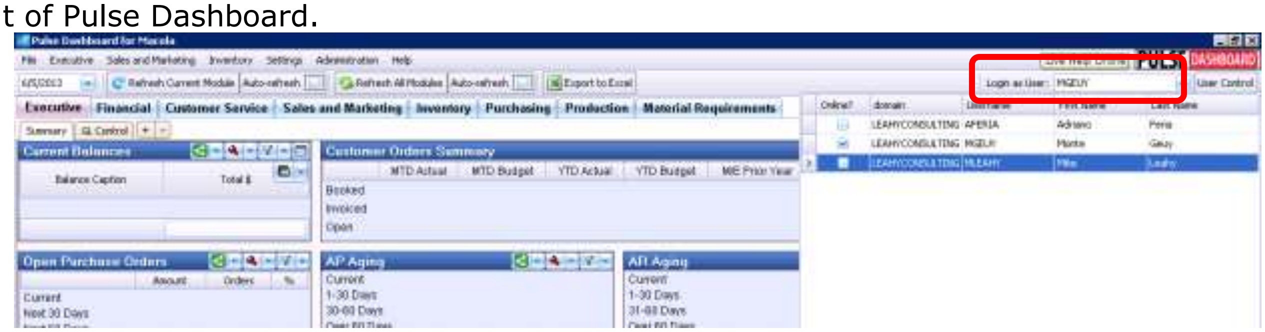
Having the administrator mode enabled will allow access to all selections on the Administrator Menu. The Administrator Mode may be enabled/disabled from any workstation. To enable the Administrator mode a password must be entered. The Admin Mode password has a default setting that may be changed by the company but if changed it is not easily reset to the default setting and must be reset by Leahy Consulting. Leahy Consulting does not have another "super" password to access the system.

The 'Admin Mode' may be enabled or disabled temporarily at any workstation as this functionality is separate from the user as defined in User Control as an Administrator. The Admin Mode is disabled by default for most users but may be enabled for Admin users.

With the Admin Mode enabled the user can temporarily assume the screens of another user by changing the 'Login As' user field to a different user to view or make adjustments to that User's screens.

Changing Users in Pulse Dashboard

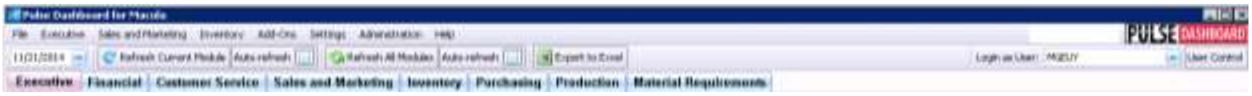
With the Administration Mode enabled there is the ability to change the display to any User setup in Pulse Dashboard. This allows an Administrator to see exactly what any User has defined on any report in Pulse Dashboard or to make any adjustments needed from another workstation. To change the logged in User, use the dropdown field in the upper right of the screen to select any User defined in Pulse Dashboard. If any changes are made to the screens remember that all changes are stored at the time that the User logs out of Pulse Dashboard.



As an example, Bill needs help in adding a column to a report in Pulse Dashboard and does not know the name of the column to add. Sally (an Administrator) logs in as Bill from her workstation and makes the change to the report for Bill. To ensure that any change is saved for Bill, he should log out of Pulse Dashboard BEFORE Sally logs out as him. As Sally logs out of Dashboard (or changes her *Login as User*) after Bill, the changes are saved for Bill and will be in place when he logs back in.

Pulse Dashboard Tool Bar

The main Tool Bar of Pulse Dashboard is made up of several dropdown menus accessed by clicking in the Executive, Sales and Marketing, Inventory, Add-Ons, Settings, Administration or Help selections. Many of these selections are also available to any User but an Administrator must be familiar with the basics of each menu as the individual applications may have an impact on multiple applications within Pulse Dashboard.



Executive Menu

Budgets

Budgets referenced here are company-wide gross Sales Budgets entered in Macola® General Ledger for comparison to actual values for Booking of new Sales Orders, Invoiced Sales Orders and the standing Backlog of Sales Orders in the Pulse Dashboard Executive Module. The use of these Budgets is optional.

The accounts referenced in Budget Entry can be setup as statistical accounts in Macola® General Ledger as they may or may not appear on financial reports in Macola® and many times no transactions are posted to these accounts. There may be multiple budgets maintained in Macola® referencing different revisions or scenarios. Select the appropriate revision or scenario when adding the accounts. Sales Accounts are usually credit balance accounts and the Invert Value checkbox will change the sign on the value from negative to positive when used on reports here in Pulse Dashboard.

The Budget Config screen is made up of three sections with similar functionality.

- The Bookings Budget section would contain the account(s) used in General Ledger for the value of new customer orders that the company hopes to enter in each month. This account(s) may be entered here by selecting the + symbol in the lower left of the Bookings Budget section of the screen. This may be entered as a range or by adding lines with the + symbol as several accounts that are not defined in a range may be used.

- The Shipments Budget section would contain the account(s) used in General Ledger for the total value of customer orders that the company hopes to ship or invoice in each month.

- The Backlog Budget section would contain the account(s) used in General Ledger for the total value of customer orders that the company believes will be unshipped at any point in each month.

Cash Flow Entry

Cash Flow Entry is used by the Pulse Dashboard Financial Module as part of the Cashflow Forecast Report. The Cashflow Forecast Report allows the User to setup a report(s) that will show the forecasted cash position of the company into the future based on standard information in Pulse Dashboard and their ERP Software for:

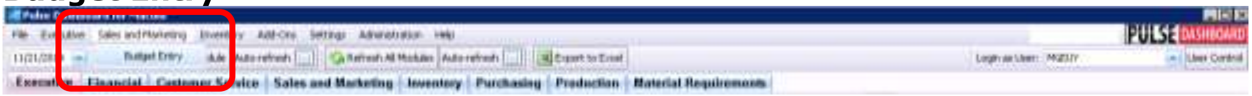
- Current Cash Balance for Cash Accounts
- Accounts Receivable (Forecasted Cash Receipt Dates may be based on Terms or Customer Avg Days To Pay)
- Unshipped Customer Orders (see Accounts Receivable for Cash Receipt)
- Accounts Payable
- Unreceived Purchase Orders
- Received/No Invoiced Purchase Orders
- Additional Cashflow Elements not predefined in Pulse Dashboard or their ERP Software such as:
    - Payroll Expense
    - Loan Payments
    - Other Revenue/Expense defined here by adding a schedule of expense/revenue by period

The Cashflow Forecast Report can also be setup with user defined time periods into the future allowing the near-term periods to be of short duration and more distant periods a longer time span if needed.

If the company uses or implements the Financial Module and the Cashflow Forecast Report additional Training assistance should be scheduled with Pulse Dashboard Support.

Sales and Marketing

Budget Entry



Budget Entry is used by the Pulse Dashboard Sales and Marketing Module and as part of the Sales Analysis Report. The Budget entered here differs from the Budget for the Executive Module. This is a detailed Sales Forecast not available in Macola® and may have multiple versions/scenarios for multiple years.

Budgets may be created and maintained by creating them from last year's actual Sales History as defined in Macola® and then adjusted up or down by a fixed amount or percentage.

The Sales Forecast may also be imported from Excel by using the template provided in Budget Entry.

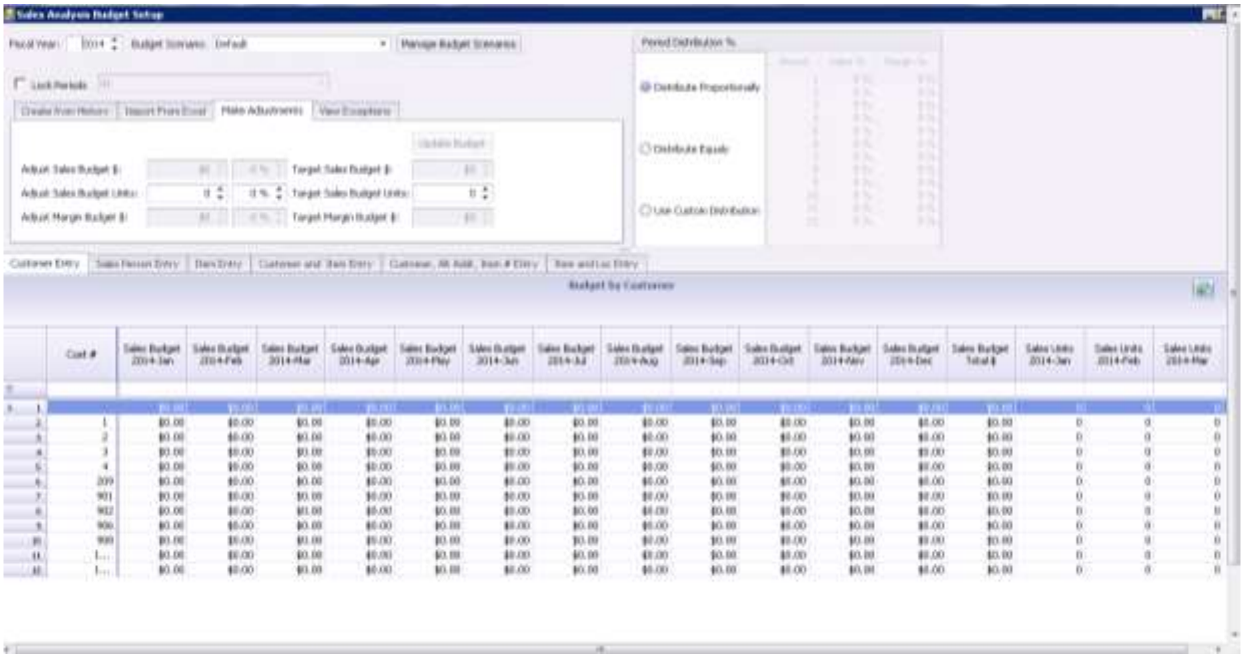
Budgets may be copied from an existing Budget and then adjusted as needed in the Budget Entry application.

Each company uses their own method of creating a Sales Forecast and Pulse Dashboard allows the Forecast to be created by:

- Sales Person
- Customer Number
- Item Number
- Customer and Item
- Customer, Alternate Address and Item
- Item and Location

For each method used the Sales Forecast may be entered by period for:

- Sales Amount
- Units
- Average Selling Price
- Sales Margin



If the company uses or implements the Sales and Marketing Module and the Sales Forecast additional Training assistance should be scheduled with Pulse Dashboard Support.

Inventory

Inventory Class Generator

The Inventory Class Generator is an optional application used to help manage Inventory Items by allowing the ABC Codes (Inventory Class) in Macola® to be evaluated and reset as necessary.

Inventory Class may be maintained by Item No (All Locations) or by Item and Location based Usage Costs which is the correct universal standard for calculating Inventory Class. Macola® does not use this method of calculating Inventory Class.

Purchased and Manufactured Items are calculated separately.

The current value for ABC Codes are loaded from Macola® and displayed, a suggested value is shown and the option to change the value to be written to Macola® is available. These values may then be loaded into Macola® updating the value shown in the Item/Loc File. This is one of the few applications to write to Macola® from Pulse Dashboard.

Add-Ons

The Add-Ons Menu is an auxiliary menu where optional custom applications could be added.

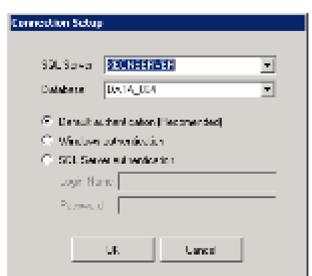
Settings

Connection

The Connection screen is where the User defines the Server and Database that they are connected to. If provision has been made to access additional databases with Pulse Dashboard, the User would access this screen to change the connection to other databases.

To change the Connection simply change settings for the Server and Database names to another licensed Server/Database combination and click OK. Pulse Dashboard will attach to the new database and load the screens for the User in that database. Errors will occur if an unlicensed Server/Database combination is selected.

Please note that User information is specific to that User in a single specific database and when moving to another database the User must be setup in that database with the appropriate access rights as defined in User Control. Screens and reports also are based on Default screens. Users may choose to Export Settings for screens and reports from one company and Import Settings into the new company if access rights are to be similar between the companies for the User (see below).



When the User Exits Pulse Dashboard, the last database that the User worked in will be the database connected to when the User restarts Pulse Dashboard.

Data Exclusions

The Data Exclusion menu is an optional advanced functionality screen typically not used.

Override Tables

The Override Tables application is an optional advanced functionality screen typically not used. It will maintain the list of modified optionally used tables for the specific User.

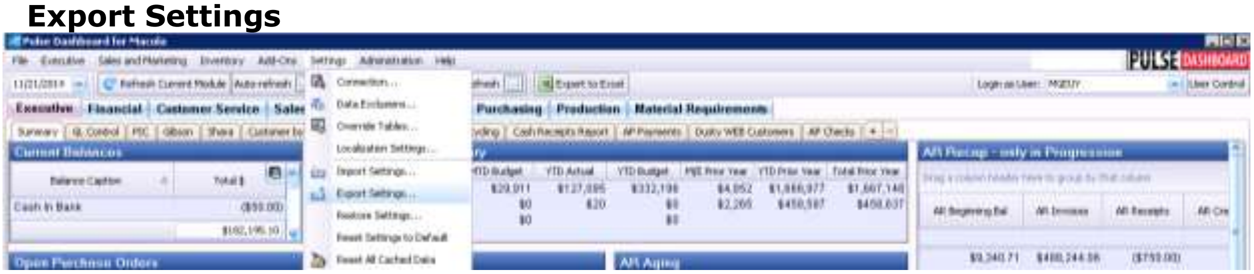
Localization Settings

The Localization Settings screen is used to define the currency symbol displayed for the User in Pulse Dashboard. This typically defaults to the country and language settings used by Windows at the workstation.

Import Settings

User Settings in Pulse Dashboard are specific to each User and Database and are sometimes referred to as their “User Profile”. The User begins with Default screens and over time will make changes to reports, add filters, add tabs and many other changes specific to their personal preferences and job requirements. These Settings may be Exported if the User has a need or would like to and they may also be Imported if need be. This might be to restore screens to a previous version or when setting up a new User with existing screens from another User or if the User would like their screens from one database to be used in another database.

Export Settings



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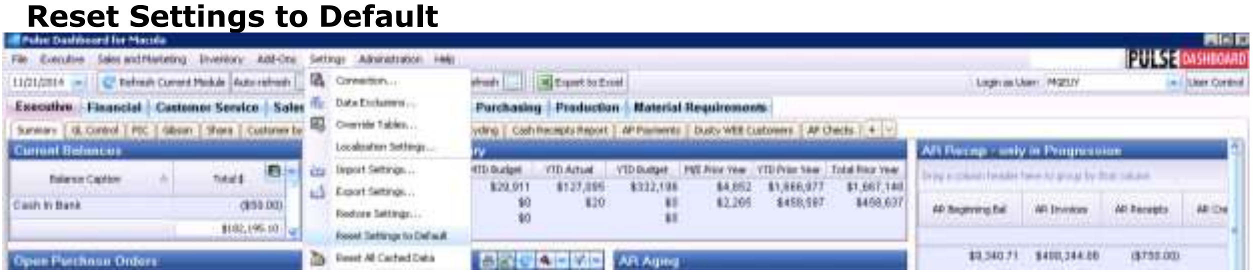
Restore Settings

The Restore Settings application could be used by the User to restore their entire User Settings (User Profile) as of a specific Date. This may be needed for restoration of reports or tabs that were changed or deleted accidentally or if the User Settings had become corrupted for some reason.

By selecting the appropriate Settings Date and selecting Restore Settings, the User Settings saved when exiting Pulse Dashboard on that date will be restored and replace the current settings being used.

Reset Settings to Default



Sometimes as Users begin using Pulse Dashboard and begin changing the standard reports many changes are made and the User may get to the point of wanting to "start over" or reset all of their screens back to when they first logged in. The Reset Settings to Default will reset all screens for the User to the Default Settings.

Defaults may also be changed for those companies that wish to define standard Default screens assigned to new Users as they are added to Pulse Dashboard. This is discussed below.

Reset All Cached Data

Pulse Dashboard uses an optimized database to retrieve data from and to display on reports and graphs. This data is based on the ERP Software tables and Pulse Dashboard tables. Some of the fields displayed are calculated "on the fly". The optimized data is refreshed by Pulse Dashboard periodically as an automatic function of Pulse Dashboard and is made available when data on screens and reports is refreshed. As a means to make this Refresh happen as quickly as possible, Pulse Dashboard reads the ERP Software tables and looks only at the specific fields from the tables that the User has used in the past 30 days and not every possible field in the tables.

Usually this periodic refresh of the optimized tables with information from the ERP tables occurs without the User being aware so when the User uses the Refresh All / Refresh Current Module or refreshes a tab or individual report the information is complete and accurate. On rare occasions the information may not seem complete or correct and a manual refresh of the optimized tables need to happen. By using the Reset All Cached Data will cause Pulse Dashboard to very quickly re-read the data from the ERP Software verifying and updating the information used on the reports in Pulse Dashboard. This happens almost instantly and the screen does not change. Once this has finished, refresh Pulse Dashboard for complete and correct results.

An example would be that the User has entered information in their ERP Software and immediately changes to Pulse Dashboard and does not see the information just typed in to the ERP Software. Use the Reset All Cached Data application and refresh the report to see the new information from the ERP Software.

A variation on this is by rt-clicking on a report header and selecting Reset All Cached Data and Refresh, the optimized table is refreshed from the database and the individual report is refreshed at once.

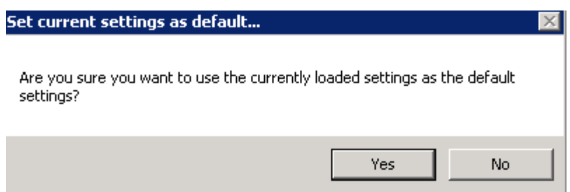
Administration

Company Settings

Default Company Settings > Set Current Settings as Default

This application will allow the company to change the Default Settings used when adding a new User to Pulse Dashboard. As Pulse Dashboard is installed, a standard set of tabs and screens are defined and are used when a new User is added. If the company has developed an alternate set of tabs or screens to be used when adding new Users this will be used in place of those settings from Leahy Consulting. The Leahy Consulting Settings will also still be available.

To make the change to the Default Settings login as the Pulse Dashboard User that has all of the settings to be used as the *new* Default. Remember that all Tabs, Reports, Filters, Columns and Sorts will be used in the new Default Settings. Once all has been verified select Yes and the new Default Settings will be used as new Users are added to Pulse Dashboard.



Default Company Settings > Delete Default Settings

This application will allow the company to delete any change made to the Default Settings that are used when adding a new User to Pulse Dashboard. As Pulse Dashboard is installed, a standard set of tabs and screens are defined and are used when a new User is added. If the company has developed an alternate set of tabs or screens to be used when adding new Users this will be used in place of those settings from Leahy Consulting. The Leahy Consulting Settings will also still be available.

Calendar

The Calendar setup is used to define the fiscal calendar used by the company. This company wide setting determines the basis for Year To Date (YTD) and Period To Date (PTD) values throughout Pulse Dashboard.

The Fiscal Year Start is used for many reports and the Production Week Start is used on Production Module Reports displaying information from the Macola® Production Order Processing (POP) or Shop Floor Control (SFC) modules. If the company uses standard 12 Periods per Year, select the month for the year to start as shown on the left from the dropdown box. If the company uses a 4-4-5 or 13 Period Calendar, select the User Defined Years checkbox and enter the dates to be used for each period.

Monthly Periods

User Defined Periods

MRP

The MRP Setup screen is used to define the dates used in Pulse Dashboard as the basis of demand and replenishment for each item. Pulse Dashboard does material planning in the Inventory and Material Requirements Modules and calculations are completely separate from the Material Requirements Planning (MRP) Module of Macola® Software.

The Macola® MRP Module requires considerable setup in the Inventory Item Master and Item/Loc Files along with several Setup screens in several modules. After the setup has been completed the Regenerate Material Plan (Regen) process must be ran usually taking several minutes to several hours to process. After the Regen has completed the results may be printed on several reports and the material plan is completed until the next cycle of planning. Depending on the volume of new or completed orders the material planning cycle should occur very often or may be a longer cycle to keep the information accurate.

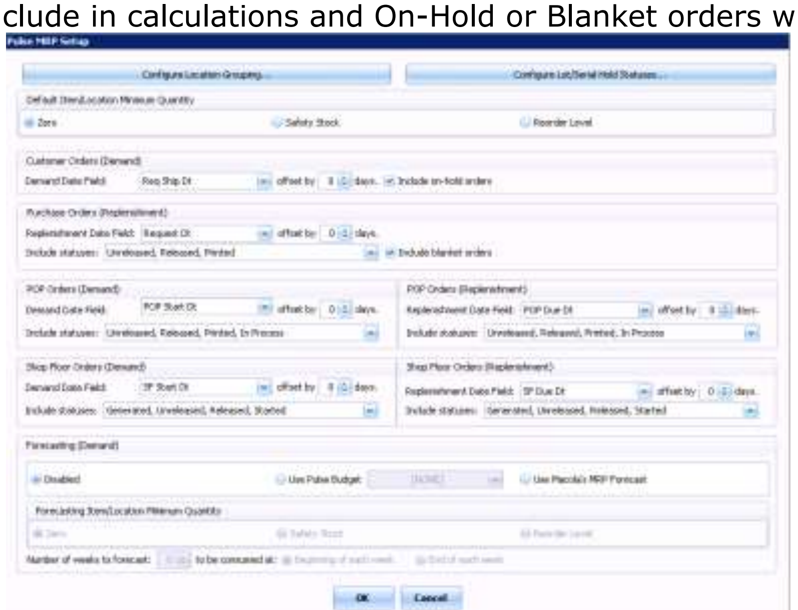
If the company uses large complex bills of materials made up of many levels of sub-assemblies and purchased components, this may be the optimum method of planning materials.

Material planning in Pulse Dashboard requires very little setup in the software or in the Inventory Item or Item/Loc files of the ERP Software. Material Planning in Pulse Dashboard is based on active orders in the system and their next layer components. These are the orders that are most critical and where most companies focus their attention.

The software setup in Pulse Dashboard is a single screen where each order type in the ERP Software is simply considered as Demand or Replenishment. Customer Orders are Demand and Purchase Orders are Replenishment order but Production (POP) Orders and Shop Floor (SFC) Orders are both as the parent item on the orders are considered Replenishment and the components are considered Demand Orders. There is no process to run in Pulse Dashboard similar to the Regen in the Macola® MRP Module and the complete, up to date, current material plan is available immediately by refreshing the reports in the various Pulse Dashboard Modules.

With each Order Type there are usually several Date fields associated on the entry screens of Macola® and this can cause confusion as to which field is used to base demand/replenishment calculations on. On this company wide screen, the User selects the dates to be used for the entire company.   This may need to be discussed and decided internally with Customer Service, Purchasing and Production representatives involved in the decision. These settings may also be changed at any point if needed with no consequence.

There is also a setting for Offset Days that will allow the company to add or subtract days from this date to allow for additional or fewer days in planning as the Offset Days can be a positive or negative value.   Other fields are available to select the Order Statuses to include in calculations and On-Hold or Blanket orders where appropriate.

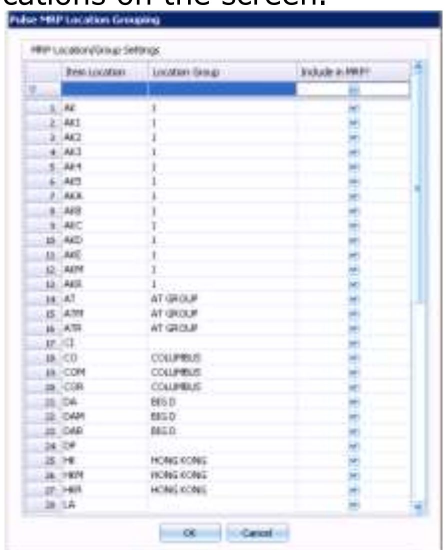


Location Grouping

In Pulse Dashboard may reports have the ability to display inventory item information based on Quantity or Value ($) by a single Location or for All Locations. Additionally, Pulse Dashboard will allow the user to establish Groups of Locations for Quantity and Value to be shown on reports based on the Location Group. This is not restricted to just the MRP Module but to reports in various modules of Pulse Dashboard if the Pulse Material Planning Module is not installed.

Adding a Group is as simple as entering the same value in the Location Group field for multiple Inventory Locations established in the Macola® Inventory Module. The values may be anything that would be a descriptive name for the group. By adding the additional columns for the Group to the reports is the next step to using Group reporting in Pulse Dashboard.

Locations may also be included or excluded in MRP computations by selecting on not selecting the locations on the screen.



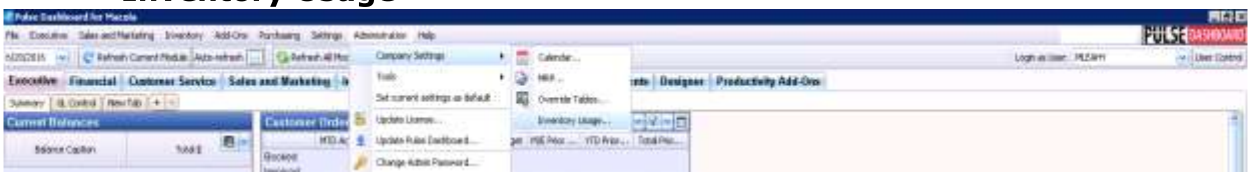
Lot/Serial Hold Statuses

If the company uses items with Lot Numbers or Serial Numbers and want to exclude specific Lots or Serial Numbers from the list of items available as they are on Hold in Macola®, the Lots or Serial Numbers with specific Hold Reasons may be designated here. Those items would not be considered available in Pulse Dashboard calculations.

Override Tables

The Override Tables application referred to here is an optional advanced functionality screen typically not used. It will maintain the list of modified optionally used tables for ALL Users. This differs from the Override Tables application under the Settings menu which refers to the specific User.

Inventory Usage

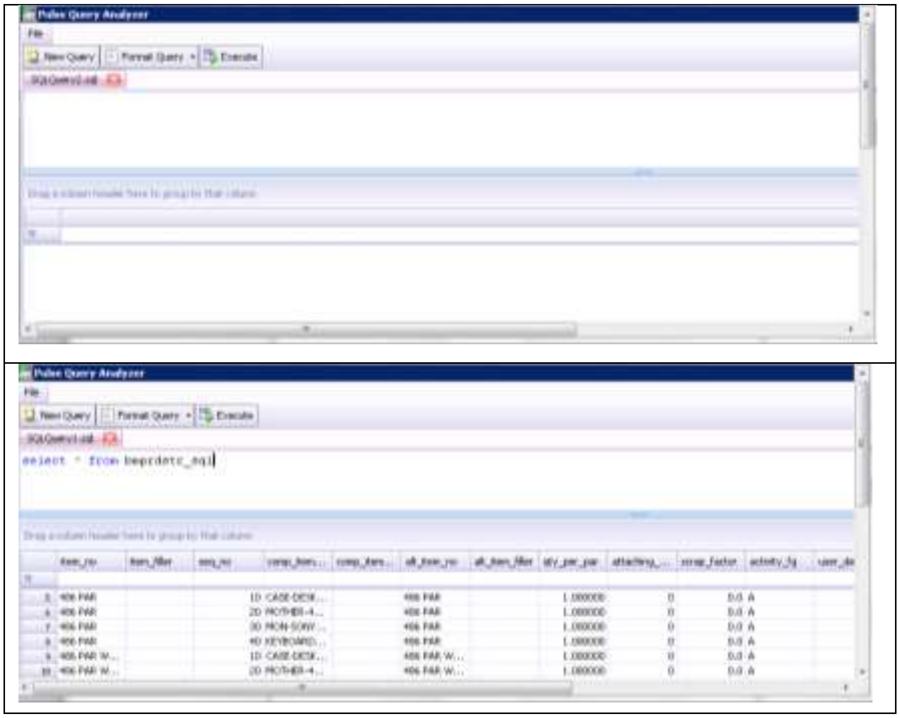


The Inventory Usage application referred to here is a checkbox allowing the Administrator to choose to include or exclude Manual Inventory Transaction for Issues and Receipts entered in Inventory Transaction Entry to be included in Usage calculations in Pulse Dashboard.

Tools

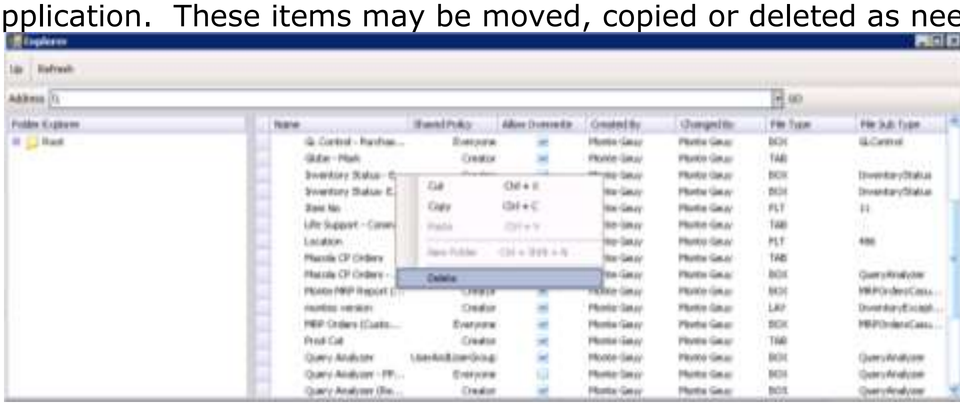
Query Analyzer

The Query Analyzer allows the User to create simple ad hoc reports using a SQL Script entered into the top portion of the screen. The data will be displayed in the bottom portion of the screen when executed. Once the information has been displayed it may be Grouped by dragging a column header to the Group line of the report, filtered using the Filter Editor, Printed or Exported to Excel just as any other report in Pulse Dashboard. The ad hoc report is not meant to be a standard report in Pulse Dashboard and is not saved. If this report is to be a custom report to be used into the future on a regular basis, this same functionality is available as part of the Designer Module where the report may be saved and shared with other Users as needed.

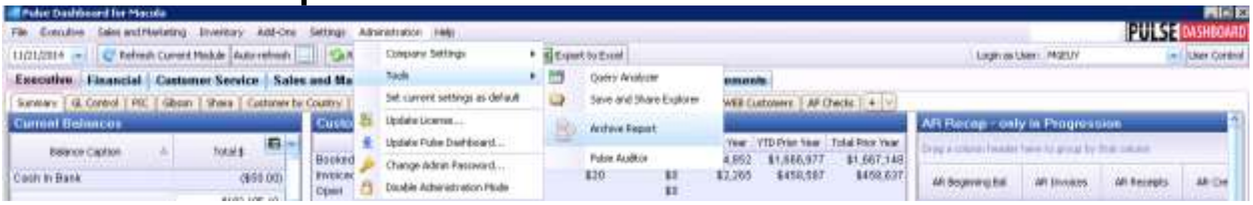


Save and Share Explorer

The Save and Share Explorer allows the User to maintain the list of reports, tabs and other tools that have been shared by Users within Pulse Dashboard via the Save and Share application. These items may be moved, copied or deleted as needed.

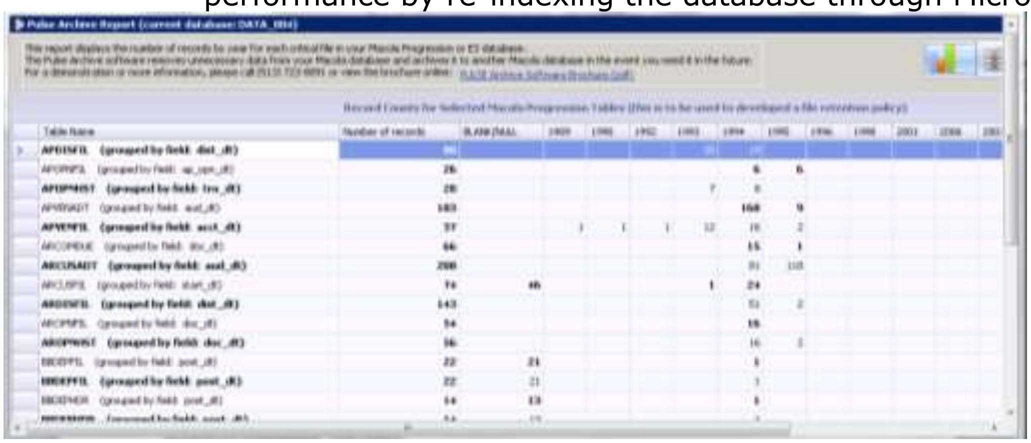


Archive Report

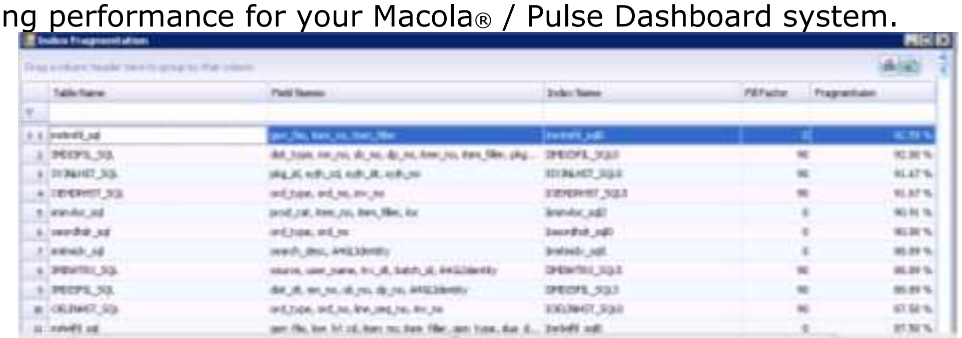


The Pulse Archive Report will allow the User to print two different reports and if needed can export the reports to Excel for evaluation. One report lists the number of records in the database by table name with a total number of records and also a breakdown of those records by the year that they were added. This allows the User to evaluate whether the data base is getting to large and overall system performance is beginning to decline because of the number of old records being maintained in the database. To maintain optimum system performance there are two options:

1. Purging unused/seldom used data in the database will permanently remove the old data
2. Use Pulse Archive to move old data to another archive database using Pulse Archive Software. Old data may be maintained in and accessed through Macola® by changing from the Live company to the Archive Company. As data is moved to the Archive Database Pulse Archive also gives the User the ability to further optimize performance by re-indexing the database through Microsoft SQL.



The Index Fragmentation Report may be run to display the amount of data fragmentation in each of the tables. Over time data tables become fragmented through normal processing and as the table becomes more fragmented performance can be affected as the system works harder to find data needed during processing. Pulse Archive Software may be used to Re-Index the data tables of the database increasing performance for your Macola® / Pulse Dashboard system.



Pulse Auditor

The Pulse Auditor allows the User to quickly review all add/change/delete activity in applications where Audit Trails are being maintained in Macola® Software.

In the Macola® Setup File for each module is a question such as "Do you wish to maintain Audit Trail?" If the company has chosen to maintain these Audit Files, the Pulse Auditor allows the User to create a report based on the Audit Files listing by User when information was added, when it was changed, what was changed and when it was deleted.

Update License

The Update License application is run when a new Pulse Dashboard License is made available to the company. This might be when additional Users or a new Pulse Dashboard Module has been added to the system. This application may be run from the Server or the Workstation using either the Pulse Dashboard Client or Pulse Dashboard program. Each database will have a license as each company accessed by Pulse Dashboard has a given number of Users that are licensed.

The Update License application will connect to the Leahy Consulting Download Server and download the updated license. This takes only a few seconds and other Pulse Dashboard Users may be continue to process reports.

Update Pulse Dashboard

We encourage PULSE Dashboard customers to update their software at least once every six months. This allows your company to take advantage of the latest additions to PULSE Dashboard.

One of the unique benefits of Pulse Dashboard is that we constantly add new content to the software. For example, you may request an enhancement for a new field or function. If that enhancement will benefit all users, it is added to the standard version of the software at no charge and is then available to all users.

All updates are delivered via the Internet and usually take less than 60 seconds. To assure consistency, we suggest that one or two people in the company be familiar with this process. USERS DO NOT NEED TO EXIT PULSE DASHBOARD OR THEIR ERP SOFTWARE.

1. Updating of the PULSE Dashboard programs must be run from the Server where the PULSE Dashboard programs are installed. This can be done by logging in directly, via Remote Connection (RDP) or some other method of logging on to the server. This process cannot be run from a mapped drive.

2. Start Pulse Dashboard by running the program: **PulseDashboard.exe** (there may be a **PULSE DASHBOARD Admin** icon on the Server Desktop). The client version of the program (Pulse Dashboard Client.exe) cannot be used to run the update.

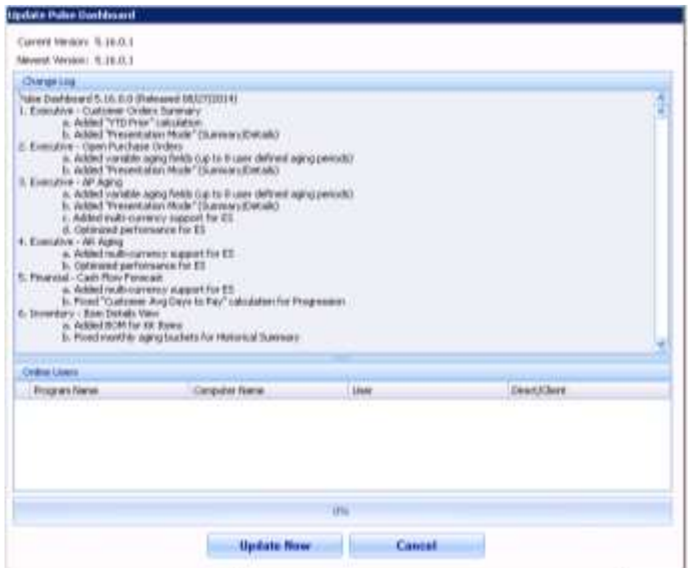
3. The PULSE Dashboard User that is logged into Dashboard will need to be a PULSE Administrator to perform this update or be logged into the software as an Administrator. *

4. From the PULSE menu bar, select the Administration Menu.

5. Select Update Pulse Dashboard.

6. The PULSE Update screen will now appear (see sample screen below). At the top of the screen, the version currently being used on the system as well as well the newest version that is available is displayed.

7. Click on the “Update Now” button at the bottom of the screen. The update is automatically downloaded from the Internet and usually takes less than 60 seconds. Once the update is completed, the PULSE software will automatically restart as the new version.



* When starting PULSE Dashboard at the server a message will probably be displayed such as “User Administrator not a Pulse Dashboard User” which is normal as Windows authentication used in PULSE Dashboard recognizes who has logged into the system and started PULSE Dashboard. Go to Administrator at the top of the screen and Enable Admin Mode using the PULSE Dashboard Administration Password and change the “Log In As” on the top right of the screen to a User with Admin rights.

After the Server installation of the software has been Updated each Workstation will be Updated automatically the next time Pulse Dashboard is started from the Desktop icon.

CAUTION – Updating the Workstation is a quick and seamless process that happens without the User being aware that it is occurring but sometimes local Anti-Virus software (on the Workstation) will view Pulse Dashboard Client.exe as a “threat” and quarantine the program rendering Pulse Dashboard inoperative. PLEASE have your IT Staff/3rd Party IT Group add an Exception or ”Whitelist” Pulse Dashboard to the Anti-Virus on each Workstation. The location of the software on the Workstation is based on the User Name of the User that uses the Workstation ex. C:\Users\UserNameHere\AppData\Local\Leahy\PulseDashboard. This is also applicable if the User starts Pulse Dashboard from a Terminal Server or some other remote access method.

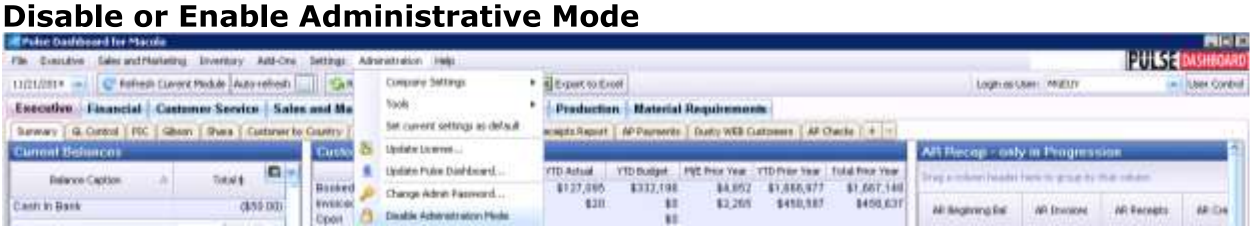
Change Admin Password

The Administrator Password is used to unlock the Administrator Menu and access all applications on this menu in addition to access to the User Control screens to add/change/delete User access rights for Users and User Groups. The Admin Mode also allows access to the Login As field permitting assuming the screens of any other User in Pulse Dashboard.

The Default Administrator Password was provided during the initial installation of Pulse Dashboard and may be obtained from Pulse Dashboard Support at Support @ PulseDashboard.com or at 513-723-8095.

It is usually advisable that more than one person have the Administrator Password especially if the Default is changed here. If the Default Password is changed Support does not have it nor is there a Master Password that can be used to activate the Administrator Mode. If the Administrator Password is NOT available and access to the Administrative Menu is needed, contact Pulse Support and it will be reset. Access to the SQL Server or SQL Management Studio MUST be available to run a SQL Script that will reset the password.

Disable or Enable Administrative Mode



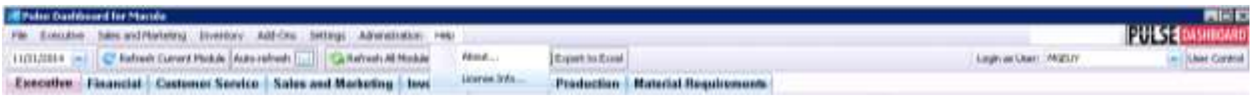
This application will disable most selections listed on the Administrative Menu of Pulse Dashboard in addition to the Login As field to change Users and the User Control screens. The Administrative Mode may be re-activated at any time from any workstation and any User by entering the Administrator Password when prompted.

Help

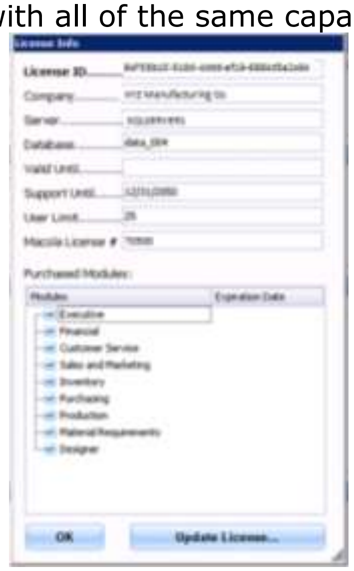
About

This screen will display the current version of the software installed, provide a link to the Pulse Dashboard website, provide an email link to Support @Pulse Dashboard.com and list the phone number for Pulse Dashboard Support.

License Info



The License Information screen provided is the same as the screen shown on the Update License application with all of the same capabilities.



Appendix

User Security Table

Print this Chart to assist the Administrator when adding Users and granting access to the Modules and Reports listed. This may be printed and distributed to Department Supervisors then returned to the Administrator when a new User is entered in Pulse Dashboard.

Authorized Modules	Edit Settings?	Change Filter?
☐ **Executive**	☐	☐
☐ AP Aging	☐	☐
☐ AR Aging	☐	☐
☐ AR Recap (*Progression only)	☐	☐
☐ Current Balances	☐	☐
☐ Customer Orders Chart	☐	☐
☐ Customer Orders Graph	☐	☐
☐ Customer Orders Summary	☐	☐
☐ GL Control	☐	☐
☐ Open Customer Orders	☐	☐
☐ Open Purchase Orders	☐	☐
☐ **Financial**	☐	☐
☐ Cash Flow Entry	☐	☐
☐ Cash Flow Forecast	☐	☐
☐ Financial Control Report	☐	☐
☐ Actual vs Budget Comparison	☐	☐
☐ **Customer Service**	☐	☐
☐ Customer List	☐	☐
☐ Customer Orders Dynamic View	☐	☐
☐ Fill Rate Graph	☐	☐
☐ Items Causing Shortages	☐	☐
☐ On Time Shipping	☐	☐
☐ Shipping Graph	☐	☐
☐ Top Credit Memos	☐	☐
☐ Top Invoiced	☐	☐
☐ **Sales and Marketing**	☐	☐
☐ Sales Anaysis	☐	☐
☐ Budget – Forecast Entry	☐	☐
☐ **Inventory**	☐	☐
☐ Inventory Usage Aging	☐	☐
☐ Inventory Bin/Serial/Lot Status	☐	☐

Inventory Class Generator		
Inventory Exceptions Summary		
Inventory Status		
Inventory Transactions		
Inventory Turns Details Chart		
Inventory Turns Graph		
Item Details View		
Physical Inventory Count		
Physical Inventory Prior Variances		
Stock Status		
Purchasing		
Purchase Order Receipts		
Purchase Orders Scheduled to be Received		
Purchasing Exception Items		
Purchasing Exception Orders		
Reorder Level		
Top Vendors		
Vendor List		
Vendor Performance		
Production		
Components Causing Shortages		
Multi-Level Shop Floor		
Production Orders		
Production Orders Aging		
Production Orders Exceptions		
Production Orders History		
Reported Production		
Shop Floor Orders Schedule		
Shop Floor Order View		
Material Requirements		
MRP Orders		
Designer		
Crystal Reports		
Crystal Reports (Logicity)		
Query Analyzer		
Save and Share Links		
Advanced Report Designer		
Productivity Add-Ons		

☐ Customer and Invoice Notes	☐	☐
☐ Customer Order Entry	☐	☐
☐ POP Order Entry	☐	☐
☐ Pulse Auditor	☐	☐
☐ Purchase Order Entry	☐	☐

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.

Visit www.PULSEDashboard.com

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Independent ERP and Macola® Specialists
Expert Support/Optimization for 25 years
Developer of Pulse Dashboard software