



# FMP360

Dashboard & Search

# FMP360 Dashboard(s) & Widgets

FMP360 Portal - GoTraining

HOME
DASHBOARD - WORK ORDERS
REFRESH
DONE

- 
- 
- 
- 
- 
- 
- 
-

**80**  
Orders Advanced

**-**  
Orders Advanced

**3**  
Orders Advanced

**-**  
Orders Advanced

**1**  
Orders Advanced

**135**  
Orders Advanced

**-**  
Orders Advanced

**-**  
Orders Advanced

**-**  
Orders Advanced

Work order by status

Work order by type

**155**  
Orders Advanced  
Failure

**24**  
Orders Advanced  
Maintenance

**40**  
Orders Advanced  
Installation

Add widget

- Embed url  
Embed a url.
- Timesheet  
Display total hours based on start/end of shift in the selected period.
- Query tile  
Displays the total number of results using a saved search query.
- Query grid  
Displays a list of results using a saved search query and displayed using the saved search grid.
- Query list  
Displays a list of results using a saved search query.
- Report  
Display a report from microsoft sql server reporting services.
- Chart  
Visualize data using saved search queries.

Dashboards with shared widgets

ADD SELECTED WIDGET
CLOSE

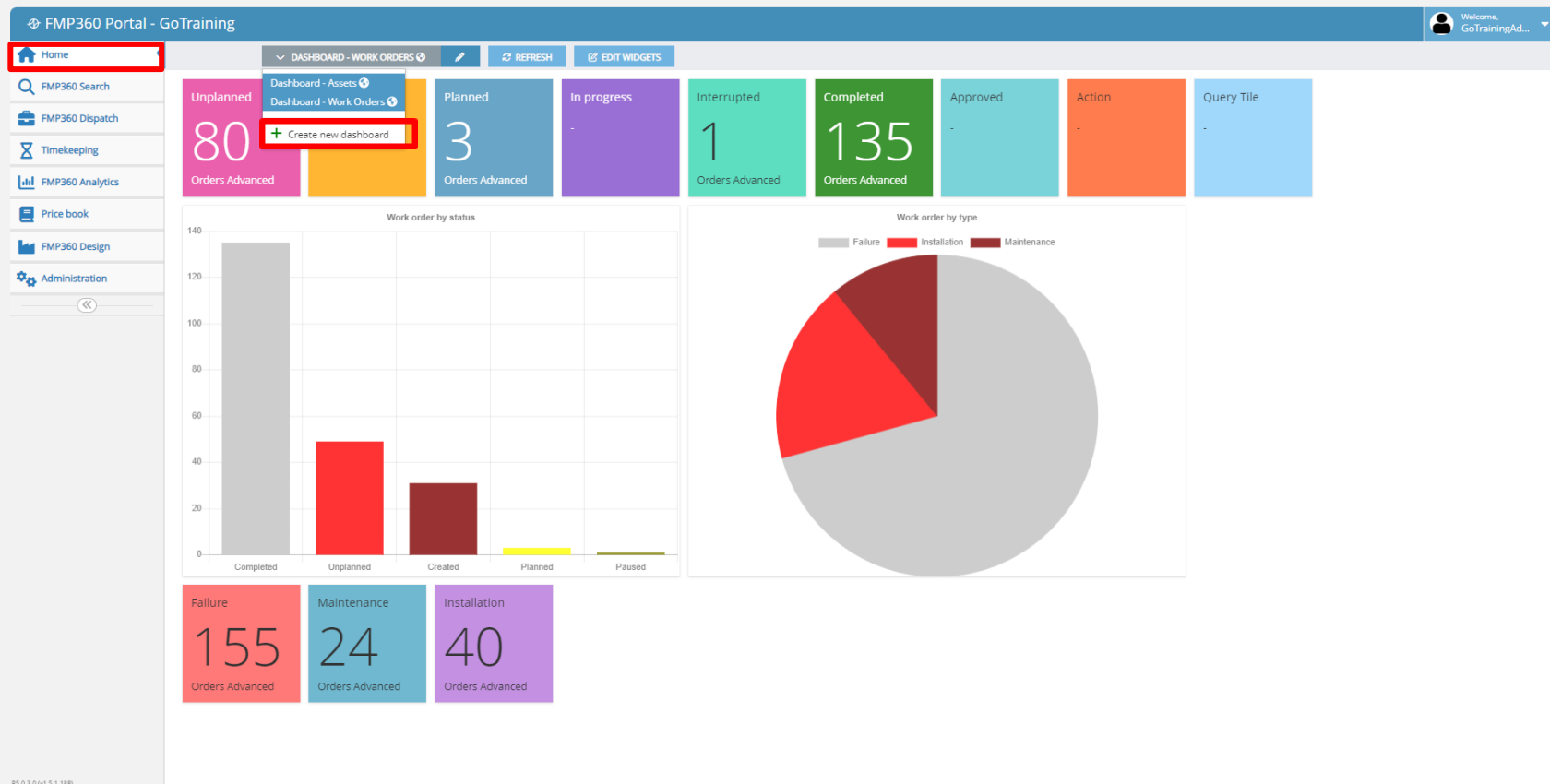
# FMP360 Dashboard(s) & Widgets

- The FMP360 Dashboard comprises of multiple widgets, each displaying distinct visualizations for various data insights.
- FMP360 Dashboards allow users to effectively visualize and comprehend the data stored within the portal.
- By leveraging visualizations, the client gains
  - improved operational insight into organizational progress
  - 24/7 access to real-time and historic reports
  - KPIs per employee & team
- The FMP360 Dashboard comprises seven widgets, each presenting information in a distinct manner through visualization.
  - Embedded URL: Embed a URL to the Dashboard
  - Time Sheet: Display total hours based on start/end of shift in the selected period.
  - Query Tile: Displays the total number of results using a saved search query
  - Query Grid: Displays a list of results using a saved search query and displayed using the saved search grid.
  - Query List: Displays a list of results using a saved search query.
  - Report: Display a report from Microsoft SQL server reporting services.
  - Chart: Visualize data using saved search queries.

# Configuring Dashboards

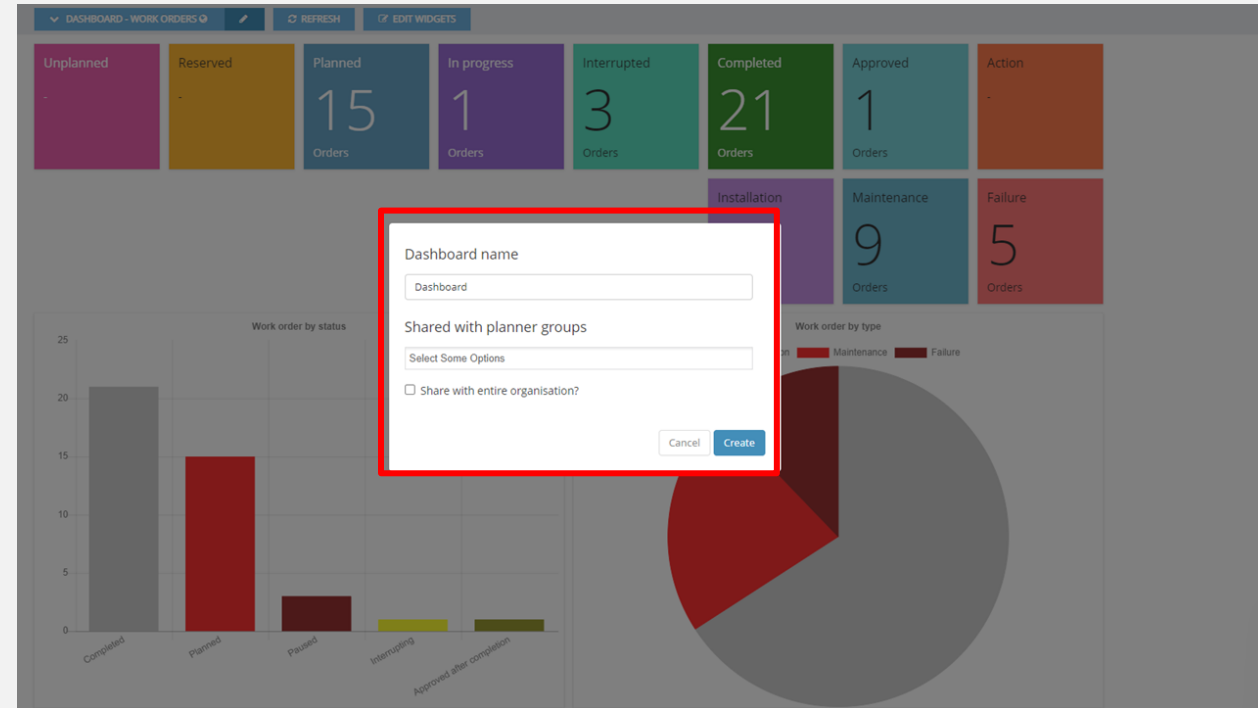
# Configuring Dashboards

- Log into portal, select 'Home' icon > From the 'Dashboard' tab select '+Create new dashboard'



# Configuring Dashboards

- Choose a name for the dashboard
- Mark the checkbox labeled "Share with entire organization" if sharing with the entire organization is desired
  - If the dashboard should not be visible to the organization leave unmarked
- 'Create'



# Configuring Dashboards

- After creating the dashboard, select the "Edit widgets" tab to add new widgets or modify existing ones on the dashboard.

The screenshot displays the 'FMP360 Portal - GoTraining' dashboard configuration interface. On the left, a sidebar contains navigation options: Home, FMP360 Search, FMP360 Dispatch, Timekeeping, FMP360 Analytics, Price book, FMP360 Design, and Administration. The main dashboard area is currently empty. A red box highlights the 'Add widget' panel on the right, which lists various widget types:

- Embed url: Embed a url.
- Timesheet: Display total hours based on start/end of shift in the selected period.
- Query tile: Displays the total number of results using a saved search query.
- Query grid: Displays a list of results using a saved search query and displayed using the saved search grid.
- Query list: Displays a list of results using a saved search query.
- Report: Display a report from microsoft sql server reporting services.
- Chart: Visualize data using saved search queries.

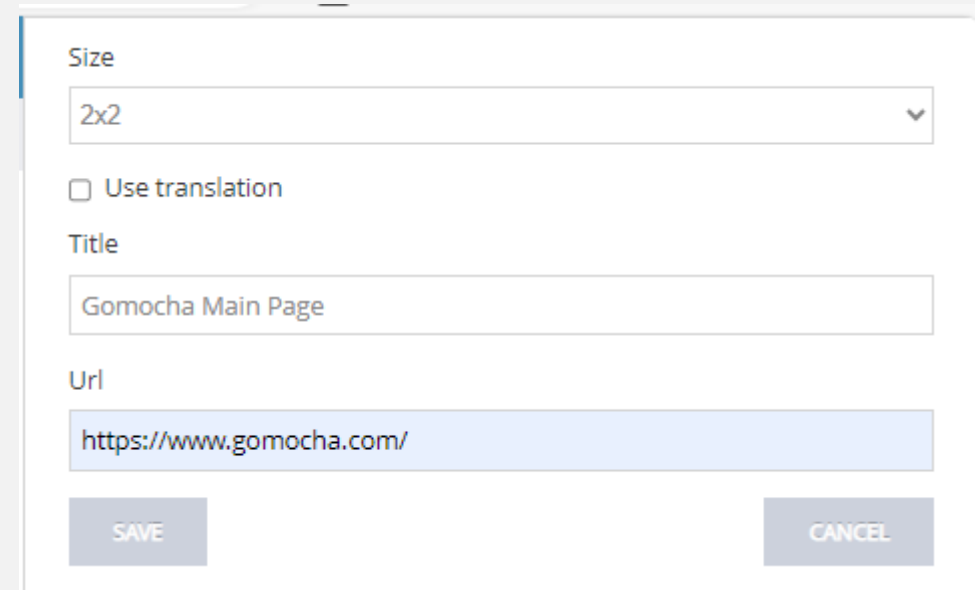
At the bottom of the panel, there is a dropdown menu for 'Dashboards with shared widgets' and two buttons: 'ADD SELECTED WIDGET' and 'CLOSE'.

# Widgets

Types and Adding to Dashboards

# Embedded URL

- Allows user to embed a URL to the Dashboard
  - Size- size of widget on dashboard screen
  - Title- title of widget on dashboard screen
  - URL- website address to widget



The image shows a configuration dialog box for embedding a URL. It contains the following fields and options:

- Size:** A dropdown menu currently showing "2x2".
- Use translation
- Title:** A text input field containing "Gomocha Main Page".
- Url:** A text input field containing "https://www.gomocha.com/".
- Buttons:** "SAVE" and "CANCEL" buttons at the bottom.

# Visual Output

The screenshot displays the FMP360 Portal - GoTraining dashboard. At the top, a blue header bar contains the page title and a user profile with the text "Welcome, GoTrainingAd...". Below the header, a navigation menu on the left lists various portal functions: Home, FMP360 Search, FMP360 Dispatch, Timekeeping, FMP360 Analytics, Price book, FMP360 Design, and Administration. The main content area features a "TEST DASHBOARD" with buttons for "REFRESH" and "EDIT WIDGETS". A secondary navigation bar includes "Careers", "Contact", and "Log In". The central focus is a large promotional banner for Gomocha with the headline "Reveal Hidden Service Efficiencies And Win In A Service-First World." and a sub-headline "ooking field service operators." A cookie consent banner is overlaid on the bottom left of the main content, with a "Got it!" button. A chat icon with a notification badge is visible in the bottom right corner of the banner area.

# Time Sheet

- Display total hours based on start/end of shift in the selected period
  - Size- size of widget on dashboard screen
  - Title- title of widget on dashboard screen
  - Chart type- visual output of time sheet on dashboard. 3 options
    - Bar, Horizontal Bar, Table
  - Sort- can specify order the data from the chart is displayed
  - Region-region(s) of users whos' hours are being collected/displayed
  - Engineer-can specify which engineer group(s) hours are being collected/displayed
  - Engineer- can specify which engineer(s) hours are being displayed
  - Date Range- dates for which the hours are displayed

Size  
3x3

Use translation

Title  
Test Timesheet

Chart type  
Bar

Sort  
None

Region  
Default

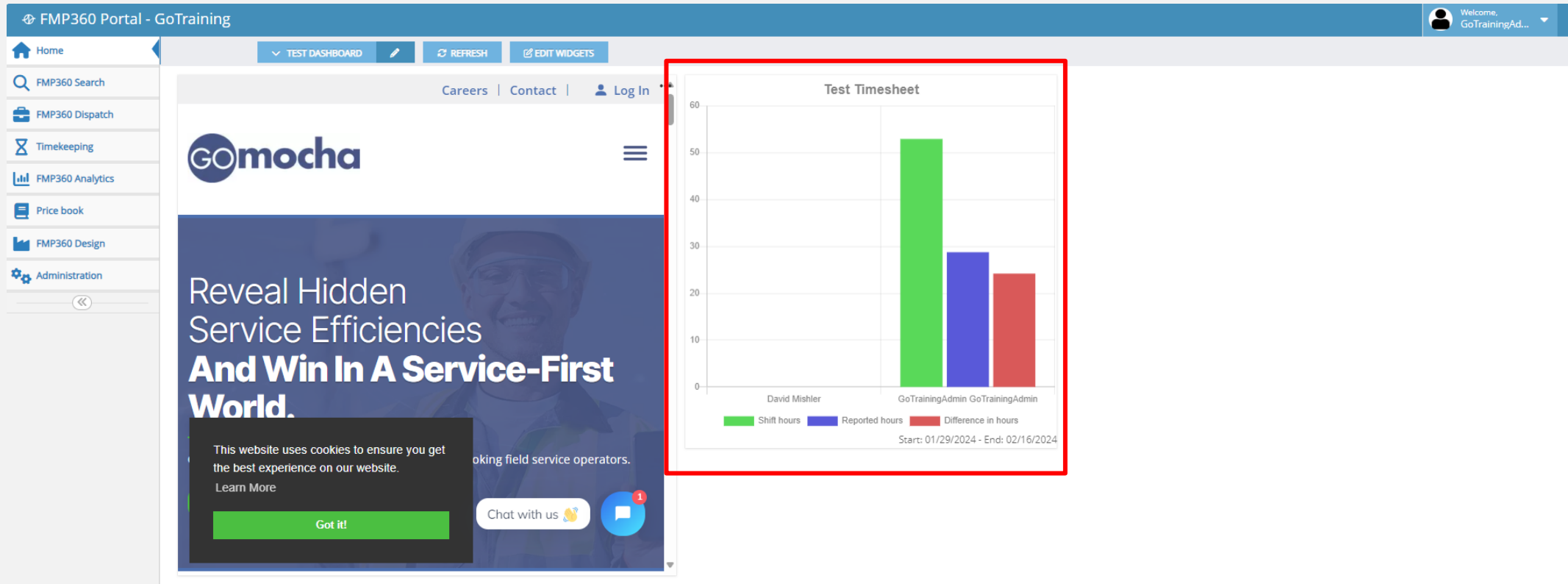
Engineer group  
Select Some Options

Engineer  
GoTrainingAdmin GoTrainingAdmin David Mishler

Date range  
01/29/2024 - 02/16/2024

SAVE CANCEL

# Visual Output



# Report

- Size-Size of widget on dashboard screen
- Share with org- is this widget shared with the entire organization or not
- Report- chosen report from configured reports list

Size

2x2

Share with entire organisation

Report

Stock Item Report

SAVE CANCEL

# Report

- Displays a report that has been made for the customer from SQL Microsoft reporting services.
  - SQL reports are configured by Gomocha consultants for customers
- When using this widget, the user must first configure the report

The screenshot shows the 'Master data manage' interface. On the left is a navigation sidebar with various menu items. The main area is divided into two panels. The left panel shows a table of master data items with columns for Description, Report type, and a status icon. The right panel shows a configuration form for a new master data item, with fields for Name, Description, Report name, Report path, Report type, and Report url. A yellow box highlights the configuration form fields.

**Master data manage**

Select master data type: Reports

Search: [ ]

Show active items only  Use translation

**+ ADD NEW MASTER DATA ITEM**

Description	Report type	
Service report	activity	✓
rpt_QuestionnaireReport	questionnaire	✓
Dashboard	dashboard	✓
Customized report	dashboard	✓
Timesheet	dashboard	✓
New User Engineer	newUser	✓
New User Planner	newUser	✓
New User Administrator	newUser	✓
Inspectielijst Vaste installatie	questionnaire	✓
Dashboard Planner	dashboard	✓
Download Last Month	dashboard	✓
Download Last Quarter	dashboard	✓
Widget report	dashboardWidget	✓
Widget report 2	dashboardwidget	✓
Widget report 3	dashboardwidget	✓
Widget report 4	dashboardwidget	✓

**SAVE ITEM** **ARCHIVE ITEM**

Name\* Widget report

Description\* Widget report

Report name\* ListOfOrganizations

Report path\* \$report\_path\$

Report type\* dashboardWidget

Report url Report url

# Visual Output

Home
TESTDASHBOARD
REFRESH
EDIT WIDGETS

- FMP360 Search
- FMP360 Dispatch
- Timekeeping
- FMP360 Analytics
- Price book
- FMP360 Design
- Administration

Completed wo...

# 23

Orders

**Title**

**Title**

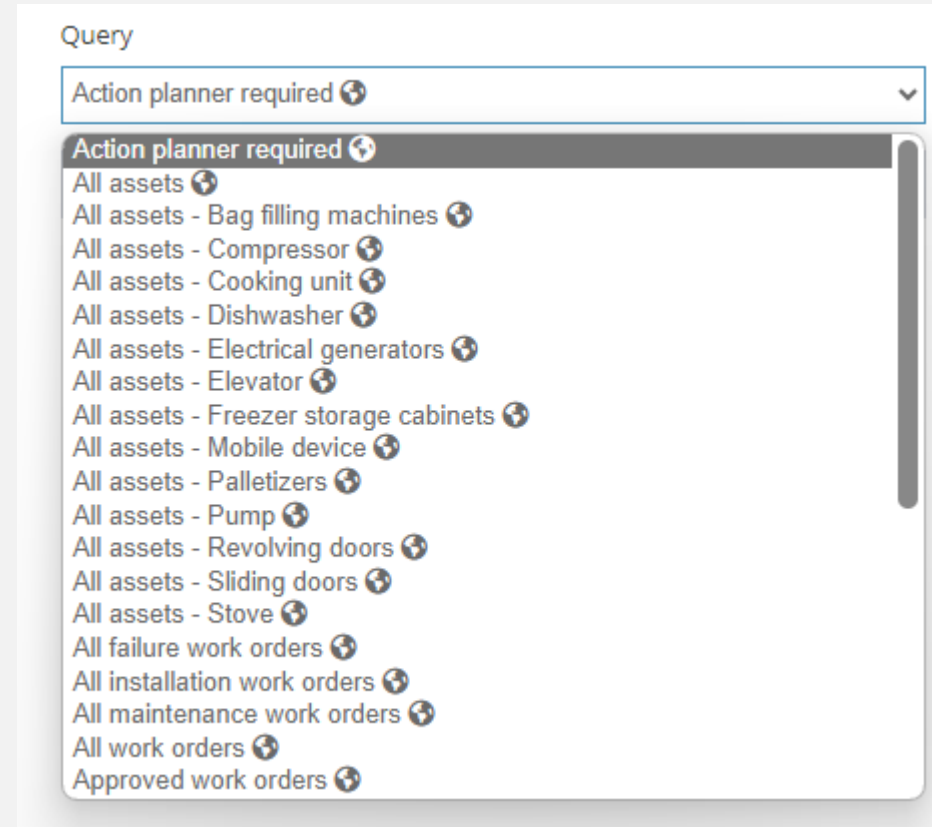
**New TimeSheet**

Start: 01/01/2023 - End: 01/31/2023

MaterialID	Material
D2T25I(2455E41)	ASC Al sample holder, φ24, through-hole
D2T25J(2455F535)	ASC Al sample holder, φ24×2.0mm
2455E463	ASC Film transmission sample holder
A319-0044(2455E462)	ASC Glass sample holder, φ18×1.0mm
775501S	O-ring
775500S	O-Ring

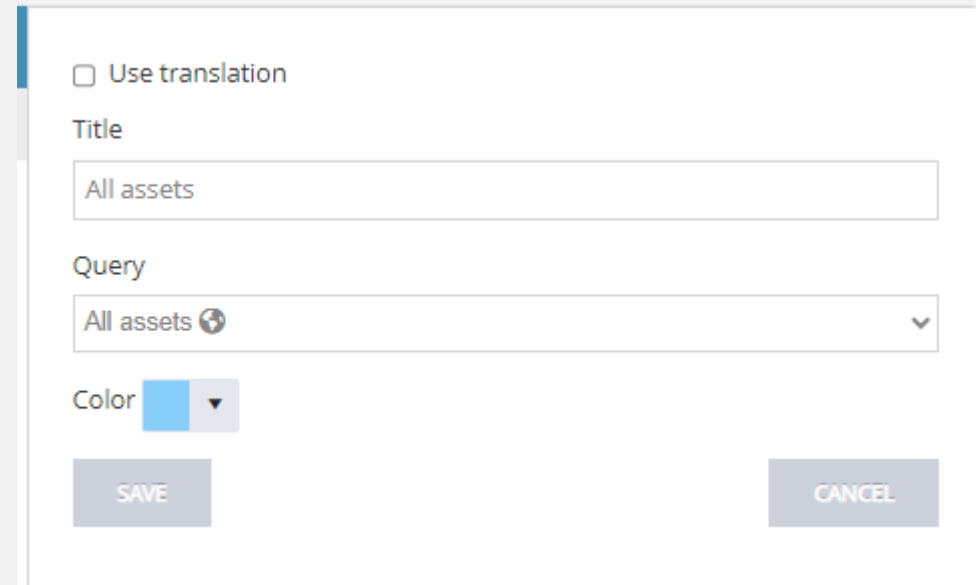
# Query Based Widgets

- The following Widgets outputs are based on saved 'Search Queries'
  - Query Tile
  - Query Grid
  - Query List
  - Chart
- Queries can be selected from drop down lists when creating a new widget
- There are preconfigured queries that standard within FMP360
- Custom queries can be created to create custom widgets
- Examples of queries can be seen in the image
- How to create a saved search query will be demonstrated in the following section



# Query Tile

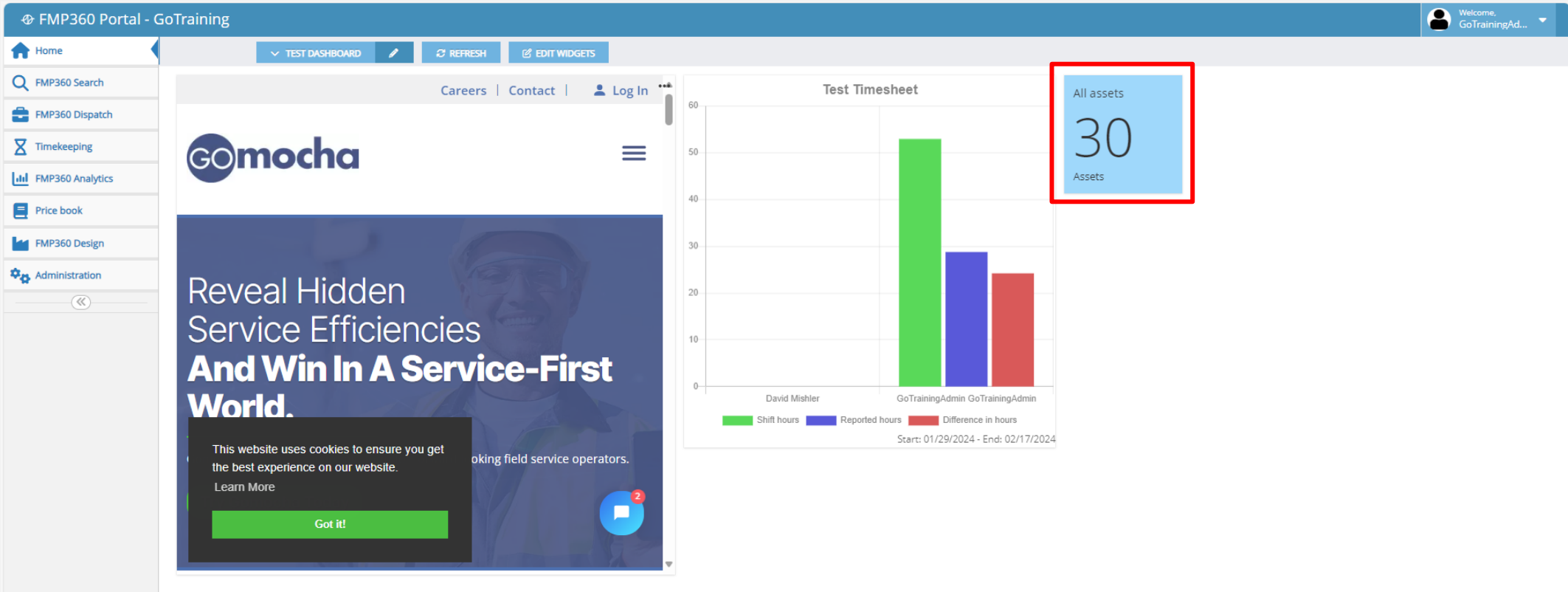
- Displays the total number of results using a saved search query
  - Title- title of widget on dashboard screen
  - Query- organizational information displayed on the widget, based on saved search queries
    - Example: All Assets- information regarding all assets will be displayed in the tile
  - Color- can specify the color of the tile on the dashboard
- When tile is clicked on the dashboard use will be redirected to FMP360 Search screen with corresponding information



The screenshot shows a configuration dialog box for a Query Tile. It includes the following elements:

- Use translation
- Title: A text input field containing "All assets".
- Query: A dropdown menu with "All assets" selected and a globe icon.
- Color: A color selection field with a blue square and a dropdown arrow.
- SAVE button
- CANCEL button

# Visual Output: On Dashboard



# Output: After Clicking Query Tile

FMP360 Portal - GoTraining Welcome, GoTrainingAd...

Home | FMP360 Search | FMP360 Dispatch | Timekeeping | FMP360 Analytics | Price book | FMP360 Design | Administration

Assets

SEARCH | ADVANCED | All assets

MAP | Asset details

Export to excel

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Co...	Id	Serial number	Description	Type	Operational hours	Next inspection date	Last inspection date	Customer	Region
<input type="checkbox"/>		Compressor	1000000	Compressor	Compressor				Ajax FC	Default
<input type="checkbox"/>		Dishwasher		Dishwasher	Dishwasher				Ajax FC	Default
<input type="checkbox"/>		Pump	0000001	Pump	Pump				Ajax FC	Default
<input type="checkbox"/>		Sliding_door	12349	Sliding door				11/13/2022	Asa Abloy	Default
<input type="checkbox"/>		Sliding_door2	12344	Sliding door	Sliding doors				Asa Abloy	Default
<input type="checkbox"/>		Sliding_door3	12347	Sliding door				11/11/2022	Asa Abloy	Default
<input type="checkbox"/>		Sliding_door4	12348	Sliding door				11/12/2022	Asa Abloy	Default
<input type="checkbox"/>		Sliding_door5	12349	Sliding door				11/13/2022	Asa Abloy	Default
<input type="checkbox"/>		Elevator	12345	Elevator	Elevator			2/7/2024	Gomocha	Default
<input type="checkbox"/>		Revolving_door	12346	Revolving door	Revolving doors			2/6/2024	Gomocha	Default
<input type="checkbox"/>		Beer_taps	2008	Beer Taps				11/12/2022	Heineken Nederland BV	Default
<input type="checkbox"/>		Beer_taps2	2009	Beer Taps				11/13/2022	Heineken Nederland BV	Default
<input type="checkbox"/>		Refrigerators	2005	Refrigerators	Refrigerators			11/8/2022	Heineken Nederland BV	Default
<input type="checkbox"/>		Refrigerators1	2006	Refrigerators				11/10/2022	Heineken Nederland BV	Default
<input type="checkbox"/>		Refrigerators3	2007	Refrigerators				11/11/2022	Heineken Nederland BV	Default
<input type="checkbox"/>		Perimeter_gate1	1005	Perimeter Gate				11/9/2022	Heras	Default
<input type="checkbox"/>		Perimeter_gate2	1006	Perimeter Gate				11/10/2022	Heras	Default
<input type="checkbox"/>		Perimete_gate3	1007	Perimeter Gate				11/11/2022	Heras	Default

# Query Grid

- Displays a list of results using a saved search query and displayed using the saved search grid.
  - Size
  - Title
  - Query-organizational information displayed on the widget, based on saved search queries
  - Grid-based on query selection
    - If query is based on work orders, then the grid will be work order details.
    - If query is asset based, the grid will show Asset details
- When grid information is clicked on the dashboard user will be redirected to corresponding details screen
  - Example: if information is based on work orders, then user will be redirected to work order details screen

The screenshot shows a configuration form for a Query Grid widget. It includes the following fields and options:

- Size:** A dropdown menu currently set to "3x4".
- Use translation:** An unchecked checkbox.
- Title:** A text input field containing "All failure work orders".
- Query:** A dropdown menu currently set to "All failure work orders".
- Grid:** A dropdown menu currently set to "Work order details".
- Buttons:** "SAVE" and "CANCEL" buttons at the bottom.

# Visual Output: On Dashboard

FMP360 Portal - GoTraining

Home | TEST DASHBOARD | REFRESH | EDIT WIDGETS

FMP360 Search | FMP360 Dispatch | Timekeeping | FMP360 Analytics | Price book | FMP360 Design | Administration

Careers | Contact | Log In

**GOmocha**

Reveal Hidden Service Efficiencies  
**And Win In A Service-First World.**

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Got it!

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30 Assets

All failure work orders

Export to excel

Drag a column header and drop it here to group by that column

Order number	Type	Status
2357352:1	Failure	Created
2358668:1	Failure	Created
2358674:2	Failure	Created
2358680:1	Failure	Created
2358680:2	Failure	Created
2358680:3	Failure	Created
2359133:2	Failure	Created
2359739:1	Failure	Created

1 - 20 of 155 items

Test Timesheet

Person	Assets
David Mishler	0
GoTrainingAdmin	53
GoTrainingAdmin	24

# Output: After Clicking on Grid Item

Order: #2358668:1 ? ✕

Order Registrations Questionnaire Status history

Order Data	Address and contact data	Order Planning
Order Number 2358668 : 1	Street -	Engineer group Default
Status Created	House Number -	Preferred engineer -
Status date and time 12/6/2023, 10:39 AM	City -	Engineers David Mishler
Reason -	Zip Code -	Default warehouse for engineer -
Remark -	State -	Scheduled start date & time 12/6/2023, 11:00 AM
Reported time 12/6/2023, 10:39 AM	Country -	Scheduled end date & time 12/6/2023, 12:00 PM
Customer -	Region -	Duration 000.01:00
Assets -	Additional Address Info -	SLA start date & time -
Contract -	Latitude -	SLA end date & time 12/6/2023, 11:00 AM
Type Failure	Longitude -	SLA duration -
Priority -		Recurring order No
Override auto-added skills No		Appointment Fixed? No
Skills -		Engineer Fixed? No
Project Number -		Problem -

CHANGE STATUS TO ▲

COPY

# Query List

- Displays a list of results using a saved search query
  - Size-size of widget on dashboard screen
  - Title
    - Can be same as query title
    - Can be customized
  - Query-Same as previous
- When list item is clicked on the dashboard user will be redirected to FMP360 Search screen with corresponding information
  - Example: if information is based on work orders, then user will be redirected to work order details screen

The screenshot shows a configuration form for a Query List widget. It includes the following fields and options:

- Size:** A dropdown menu currently set to "2x2".
- Use translation:** An unchecked checkbox.
- Title:** A text input field containing "Completed work orders".
- Query:** A dropdown menu currently set to "Completed work orders" with a globe icon.
- Buttons:** "SAVE" and "CANCEL" buttons at the bottom.

# Visual Output: On Dashboard

FMP360 Portal - GoTraining Welcome, GoTrainingAd...

Home | TEST DASHBOARD | REFRESH | EDIT WIDGETS

Home | FMP360 Search | FMP360 Dispatch | Timekeeping | FMP360 Analytics | Price book | FMP360 Design | Administration

Careers | Contact | Log In

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Got it!

### All failure work orders

Export to excel

Drag a column header and drop it here to group by that column

Order number	Type	Status
2357352:1	Failure	Created
2358668:1	Failure	Created
2358674:2	Failure	Created
2358680:1	Failure	Created
2358680:2	Failure	Created
2358680:3	Failure	Created
2359133:2	Failure	Created
2359739:1	Failure	Created

1 - 20 of 155 items

### Completed work orders

#	Status	Type
2...	Completed	Maintenance
2...	Completed	Maintenance
2...	Completed	Maintenance
2...	Completed	Maintenance
2...	Completed	Maintenance
2...	Completed	Maintenance
2...	Completed	Failure

### All assets

30 Assets

### Test Timesheet

# Output: After Clicking List Item

Project: #2360581:1 ✕

Project | Registrations | Customer | Questionnaire | Status history

Order Data	Order Planning	Address and contact data
<p><b>Status</b> Completed</p> <p><b>Order Number</b> 2360581 : 1</p> <p><b>Status date and time</b> 12/13/2023, 2:55 PM</p> <p><b>Minimum appointments</b> -</p> <p><b>Assets</b> -</p> <p><b>Customer</b> Gomocha</p> <p><b>Reported time</b> 12/13/2023, 2:25 PM</p> <p><b>Type</b> Maintenance</p> <p><b>Priority</b> -</p> <p><b>Skills</b> -</p> <p><b>Characteristics</b> -</p> <p><b>Project Number</b> -</p> <p><b>Description</b> -</p> <p><b>Name</b> -</p>	<p><b>Appointment Fixed?</b> No</p> <p><b>Scheduled start date &amp; time</b> 12/13/2023, 2:30 PM</p> <p><b>Scheduled end date &amp; time</b> 12/13/2023, 6:30 PM</p> <p><b>Duration</b> 000.04:00 <small>Shown as days.hours:minutes</small></p> <p><b>SLA start date &amp; time</b> 12/13/2023, 2:30 PM</p> <p><b>SLA end date &amp; time</b> 12/18/2023, 2:30 PM</p> <p><b>SLA duration</b> 005.00:00 <small>Shown as days.hours:minutes</small></p> <p><b>Problem</b> -</p> <p><b>Cause</b> -</p> <p><b>Solution</b> -</p>	<p><b>Street</b> Actherweg 38</p> <p><b>House Number</b> -</p> <p><b>City</b> Waardenburg</p> <p><b>Zip Code</b> 4181 AE</p> <p><b>Region</b> Default</p> <p><b>Country</b> Netherlands</p> <p><b>State</b> -</p> <p><b>Additional Address Info</b> -</p> <p><b>Latitude</b> 51.83249909547578 </p> <p><b>Longitude</b> 5.248289108276367</p>

CHANGE STATUS TO

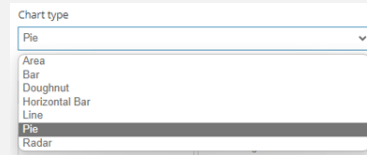
APPROVE

APPROVE ALL

ORDERS NEARBY

# Chart

- Visualize data in chart form using saved search queries
  - Size-same as previous
  - Title-same as previous
  - Query-same as previous
  - Chart Type-7 options →
  - Group By- how information is grouped,
    - large amount of options
  - Sort-
    - Value/Label
  - Order-How information on chart is ordered
    - Ascending/Descending



Size  
3x3

Use translation

Title  
Completed work orders

Query  
Completed work orders

Chart type  
Pie

Group by  
Active Customer

Sort  
Value

Order  
Descending

# Visual Output: On Dashboard

The dashboard displays the following components:

- Navigation:** Home, FMP360 Search, FMP360 Dispatch, Timekeeping, FMP360 Analytics, Price book, FMP360 Design, Administration.
- Hero Section:** "Reveal Hidden Service Efficiencies And Win In A Service-First World." with a "Got it!" button and a "Chat with us" button.
- TEST DASHBOARD:** Includes "REFRESH" and "EDIT WIDGETS" buttons.
- All failure work orders:** A table with columns for Order number, Type, and Status. It includes an "Export to excel" button and a pagination control showing "1 - 20 of 155 items".
- Completed work orders:** A table with columns for #, Status, and Type, listing several completed maintenance and failure orders.
- All assets:** A blue widget showing "30 Assets".
- Test Timesheet:** A bar chart with three bars in green, blue, and red.
- Completed work orders (Pie Chart):** A pie chart showing a small red slice and a larger grey slice, with a legend above it.

# FMP360 Search

Creating a Saved Search for Custom Query Widgets

# FMP360 Search: Overview

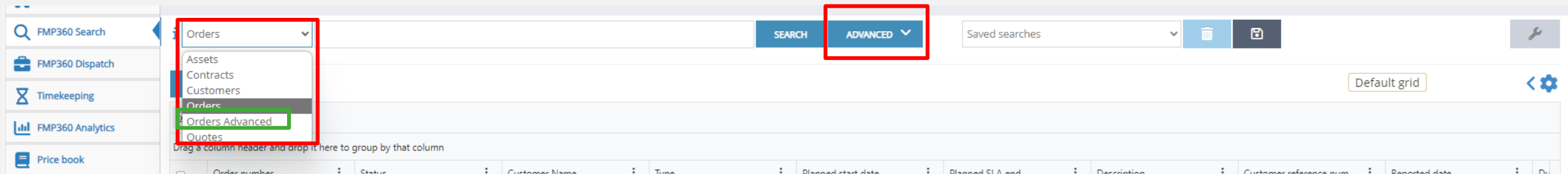
- By selecting entities and fields, save searches can be created and by selecting concrete fields, more advance search can be created to narrow down the search that is made
- FMP360 search allows the customer to easily find information through their data organization
- By creating saved searches, the user can create custom queries for widgets on their FMP360 Dashboard

The screenshot displays the FMP360 Portal search interface. On the left, a sidebar contains navigation options: Home, FMP360 Search, FMP360 Dispatch, Timekeeping, FMP360 Analytics, Price book, FMP360 Design, and Administration. The 'FMP360 Search' option is highlighted with a red box, and its dropdown menu is open, showing a list of entities: Orders, Assets, Contracts, Customers, Orders, Orders Advanced, and Quotes. The main area features a search bar with 'SEARCH' and 'ADVANCED' buttons, and a 'Saved searches' dropdown. Below the search bar is a table with columns: Order number, Status, Customer Name, Type, Planned start date, Planned SLA end, Description, Customer reference num..., Reported date, and Du. The table contains 20 rows of maintenance orders. At the bottom, there is a pagination control showing '1 - 20 of 258 items' and 'Items per page' set to 20.

Order number	Status	Customer Name	Type	Planned start date	Planned SLA end	Description	Customer reference num...	Reported date	Du
2372226-1	Paused	Gomocha	Maintenance	2/5/2024 8:50 PM	2/10/2024 5:08 PM			2/5/2024 5:03 PM	00
2372213-2	Unplanned	Gomocha	Maintenance	2/6/2024 1:35 AM	2/5/2024 6:40 PM			2/5/2024 4:45 PM	00
2360461-2	Created	Gomocha	Maintenance	12/13/2023 11:00 AM	12/13/2023 11:00 AM			12/13/2023 10:46 AM	00
2372213-1	Unplanned	Gomocha	Maintenance	2/6/2024 5:35 AM	2/5/2024 6:40 PM			2/5/2024 4:45 PM	00
2361057-1	Completed	Gomocha	Maintenance	12/14/2023 3:36 PM	12/19/2023 3:36 PM			12/14/2023 3:31 PM	00
2360829-1	Cancelled (H)	Gomocha	Maintenance	12/14/2023 10:18 AM	12/19/2023 10:18 AM			12/14/2023 10:13 AM	00
2349778-1	Unplanned	Ajax FC	Maintenance	10/13/2023 2:34 PM	10/13/2023 2:35 PM			10/13/2023 2:29 PM	00
2372213-3	Unplanned	Gomocha	Maintenance	2/5/2024 9:35 PM	2/5/2024 6:40 PM			2/5/2024 4:45 PM	00
2346325-1	Unplanned	Selecta Nederland	Maintenance	9/27/2023 8:17 AM	10/1/2023 3:23 PM			9/25/2023 3:18 PM	00
2346321-1	Unplanned	Heras	Maintenance	9/27/2023 8:05 AM	10/1/2023 3:21 PM			9/25/2023 3:16 PM	00
2346299-1	Unplanned	Gomocha	Maintenance	9/27/2023 8:17 AM	10/1/2023 2:47 PM			9/25/2023 2:42 PM	00
2360951-1	Planned	Gomocha	Maintenance	12/14/2023 12:50 PM	12/19/2023 12:50 PM			12/14/2023 12:45 PM	00
2360581-1	Completed	Gomocha	Maintenance	12/13/2023 2:30 PM	12/18/2023 2:30 PM			12/13/2023 2:25 PM	00
2360956-1	Completed	Gomocha	Maintenance	12/14/2023 1:06 PM	12/19/2023 1:06 PM			12/14/2023 1:01 PM	00
2360182-2	Created		Maintenance	12/12/2023 2:00 PM	12/12/2023 2:00 PM			12/12/2023 1:31 PM	00
2346306-1	Unplanned	Selecta Nederland	Maintenance	9/27/2023 8:00 AM	10/1/2023 2:53 PM			9/25/2023 2:48 PM	00
2342381-1	Unplanned	Gomocha	Maintenance	8/30/2023 8:00 AM	8/30/2023 5:06 PM			8/25/2023 5:01 PM	00
2346319-1	Unplanned	Ajax FC	Maintenance	9/27/2023 8:05 AM	10/1/2023 3:20 PM			9/25/2023 3:15 PM	00

# Creating Advanced Search for Widgets

- From the drop down select what you want to create a query for
  - Assets
  - Contracts
  - Customers
  - Orders Advanced (Most Used): will be used for this example
  - Quotes
- Click 'Advanced' tab
  - Will present options for creating saved search



# Creating Advanced Search for Widgets

- Click "+Add Rule" to layout the number of rules for the query
  - Within a save search the user can use both and/or operators when using multiple rules
  - 3 used for this example all
- Create rules for query search:

The screenshot displays the advanced search configuration interface. It features a sidebar with navigation options: FMP360 Dispatch, Timekeeping, FMP360 Analytics, Price book, FMP360 Design, and Administration. The main area shows three rules being built:

- Rule 1:** Field selection dropdown is open, showing options: Customer, Order number, Status, Type.
- Rule 2:** Field is 'Type', operator is 'In', and a 'Select Some Options' input field is present.
- Rule 3:** Field is 'Type', operator is 'Equal', and a dropdown menu is open showing options: Maintenance, Project, Lunch, Meeting, Travel home, E-Call, Installation, Failure.

At the bottom, a table header is visible with columns: Order number, Status, Type, Planned start date, Planned SLA end, Description, Customer reference num..., and Reported date.

# Creating Advanced Search for Widgets

- Multiple Rules can be created for the search: 3 simple rules used for example below
- When finished establishing the rules, click 'Search' to ensure the search rules work

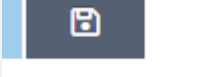
The screenshot displays the advanced search configuration interface. At the top, there are buttons for 'Clear all', 'Type Equal Failure', 'Status Equal Completed', and 'Customer Equal Gomocha'. Below these, a rule configuration area is shown with three rules defined:

- Rule 1: Type = Failure
- Rule 2: Status = Completed
- Rule 3: Customer = Gomocha

The rules are connected by 'AND' logic. Below the configuration, there is a 'Search' button and an 'Export' button. The search results are displayed in a table below:

Order number	Status	Customer Name	Type	Planned start date	Planned SLA end	Description	Customer reference num...	Reported date
2367584:1	Completed	Gomocha	Failure	1/17/2024 2:54 PM				1/17/2024 2:54 PM
2367587:1	Completed	Gomocha	Failure	1/17/2024 2:55 PM				1/17/2024 2:56 PM
2367592:1	Completed	Gomocha	Failure	1/17/2024 3:01 PM				1/17/2024 3:01 PM
2367602:1	Completed	Gomocha	Failure	1/17/2024 3:08 PM				1/17/2024 3:08 PM
2367608:1	Completed	Gomocha	Failure	1/17/2024 3:13 PM				1/17/2024 3:13 PM
2367615:1	Completed	Gomocha	Failure	1/17/2024 3:16 PM				1/17/2024 3:16 PM
2367626:1	Completed	Gomocha	Failure	1/17/2024 3:34 PM				1/17/2024 3:34 PM
2367638:1	Completed	Gomocha	Failure	1/17/2024 3:45 PM				1/17/2024 3:45 PM
2367640:1	Completed	Gomocha	Failure	1/17/2024 3:50 PM				1/17/2024 3:51 PM
2367644:1	Completed	Gomocha	Failure	1/17/2024 3:55 PM				1/17/2024 3:56 PM
2367655:1	Completed	Gomocha	Failure	1/17/2024 4:03 PM				1/17/2024 4:03 PM
2367663:1	Completed	Gomocha	Failure	1/17/2024 4:15 PM				1/17/2024 4:15 PM
2368108:1	Completed	Gomocha	Failure	1/18/2024 4:34 PM				1/18/2024 4:35 PM

# Saving Advanced Search for Widgets

- Click the “Save” icon next to ‘saved searches’ 
- Select “Use Translation” > Select “Create New” from the drop-down list next to ‘Auto Search’
- Create name for new query> Select “Shared Search” box > and Save

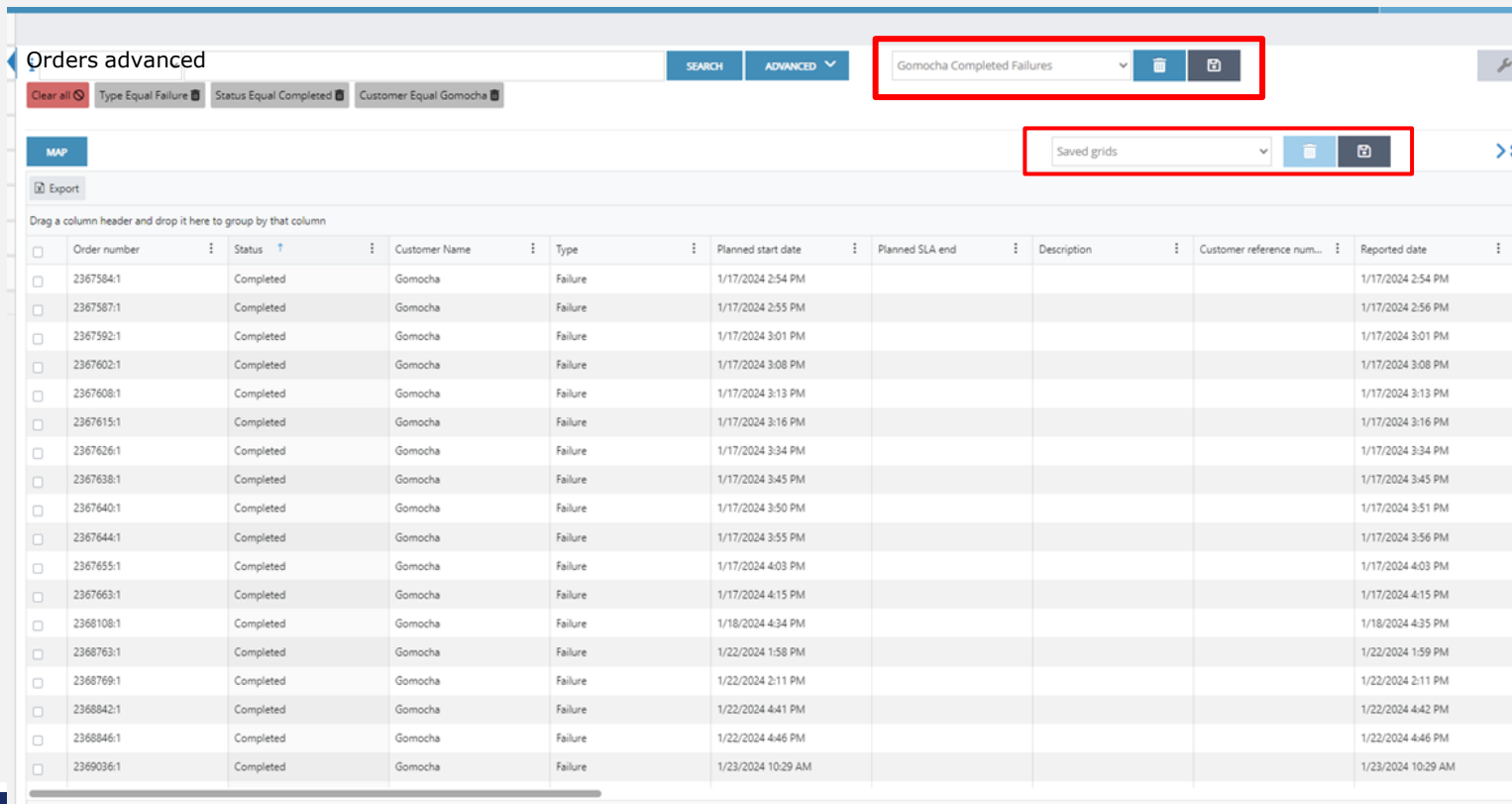
The screenshot illustrates the steps to save an advanced search for widgets. It shows the 'Save search' dialog box overlaid on the 'Orders advanced' search interface. The dialog includes a 'Use translation' checkbox, an 'Auto search' dropdown menu, a 'Saved grids' dropdown, and a 'Shared search' checkbox. A 'SAVE' button is located at the bottom right of the dialog.

**Step 1:** The 'Auto search' dropdown is open, showing a list of localization keys. 'Create New' is selected.

**Step 2:** The 'Auto search' dropdown is set to 'Gomocha Completed Failures'. The 'Shared search' checkbox is highlighted with a red box.

# Saving Advanced Search for Widgets

- The advanced search/query is now saved and can be applied to all query related widgets on the Dashboard
- Note: After saving the search, users can all save the results as a new grid
  - Click the save icon next to 'saved grids' and follow the same naming and save process

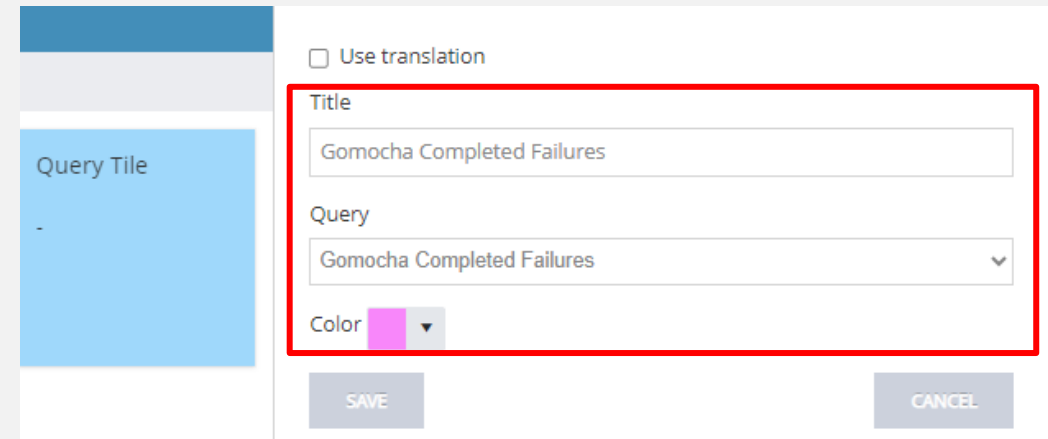


The screenshot shows the 'Orders advanced' dashboard. At the top, there is a search bar with 'Gomocha Completed Failures' selected, highlighted by a red box. Below the search bar, there are filters for 'Type Equal Failure', 'Status Equal Completed', and 'Customer Equal Gomocha'. A 'MAP' button is visible on the left. Below the filters, there is a 'Saved grids' dropdown menu, also highlighted by a red box, with a save icon next to it. The main content is a table with the following columns: Order number, Status, Customer Name, Type, Planned start date, Planned SLA end, Description, Customer reference num..., and Reported date. The table contains 20 rows of data, all with a status of 'Completed' and a type of 'Failure'.

Order number	Status	Customer Name	Type	Planned start date	Planned SLA end	Description	Customer reference num...	Reported date
2367584:1	Completed	Gomocha	Failure	1/17/2024 2:54 PM				1/17/2024 2:54 PM
2367587:1	Completed	Gomocha	Failure	1/17/2024 2:55 PM				1/17/2024 2:56 PM
2367592:1	Completed	Gomocha	Failure	1/17/2024 3:01 PM				1/17/2024 3:01 PM
2367602:1	Completed	Gomocha	Failure	1/17/2024 3:08 PM				1/17/2024 3:08 PM
2367608:1	Completed	Gomocha	Failure	1/17/2024 3:13 PM				1/17/2024 3:13 PM
2367615:1	Completed	Gomocha	Failure	1/17/2024 3:16 PM				1/17/2024 3:16 PM
2367626:1	Completed	Gomocha	Failure	1/17/2024 3:34 PM				1/17/2024 3:34 PM
2367638:1	Completed	Gomocha	Failure	1/17/2024 3:45 PM				1/17/2024 3:45 PM
2367640:1	Completed	Gomocha	Failure	1/17/2024 3:50 PM				1/17/2024 3:51 PM
2367644:1	Completed	Gomocha	Failure	1/17/2024 3:55 PM				1/17/2024 3:56 PM
2367655:1	Completed	Gomocha	Failure	1/17/2024 4:03 PM				1/17/2024 4:03 PM
2367663:1	Completed	Gomocha	Failure	1/17/2024 4:15 PM				1/17/2024 4:15 PM
2368108:1	Completed	Gomocha	Failure	1/18/2024 4:34 PM				1/18/2024 4:35 PM
2368763:1	Completed	Gomocha	Failure	1/22/2024 1:58 PM				1/22/2024 1:59 PM
2368769:1	Completed	Gomocha	Failure	1/22/2024 2:11 PM				1/22/2024 2:11 PM
2368842:1	Completed	Gomocha	Failure	1/22/2024 4:41 PM				1/22/2024 4:42 PM
2368846:1	Completed	Gomocha	Failure	1/22/2024 4:46 PM				1/22/2024 4:46 PM
2369036:1	Completed	Gomocha	Failure	1/23/2024 10:29 AM				1/23/2024 10:29 AM

# Applying Saved Search to Widgets: Tile, List, Charts

- From the Dashboard
  - Edit Widgets-Select a Query widget
  - Click "Add Selected Widget"
  - Give new widget title (name of new query)
  - From "Query" drop down select newly created query/saved search
- Save



The screenshot shows a dashboard with a 'Query Tile' widget. A configuration dialog is open, showing the following fields:

- Use translation
- Title: Gomocha Completed Failures
- Query: Gomocha Completed Failures
- Color: [Pink color swatch]

Buttons: SAVE, CANCEL

# Visual Output: On Dashboard

- Note: Same rules apply for custom query widgets as previously shown regarding accessing information withing them

The screenshot displays the FMP360 Portal - GoTraining dashboard. The main content area features a large banner with the text "Reveal Hidden Service Efficiencies And Win In A Service-First World." Below this is a cookie consent banner. The dashboard includes several widgets:

- All failure work orders:** A table listing work orders with columns for Order number, Type, and Status. The table shows 10 rows of data, all with a status of "Created".
- All assets:** A widget showing a count of 30 Assets.
- Test Timesheet:** A bar chart showing the number of test items for three users: David Mishler (0), GoTrainingAdmin (53), and GoTrainingAdmin (24).
- Gomocha Com...:** A widget showing a count of 97 Orders, highlighted with a red box.

Order number	Type	Status
2357352:1	Failure	Created
2358668:1	Failure	Created
2358674:2	Failure	Created
2358680:1	Failure	Created
2358680:2	Failure	Created
2358680:3	Failure	Created
2359133:2	Failure	Created
2359739:1	Failure	Created

User	Count
David Mishler	0
GoTrainingAdmin	53
GoTrainingAdmin	24

# Applying Saved Searches to Widgets: Query Grid

- Query Grid
  - To apply a saved search to a query grid widget, a saved grid needs to be created first.
  - Once the grid is saved then the new search+ grid can be used in the widget

The screenshot displays a query grid interface. At the top, there is a search bar with the text 'Orders advanced' and buttons for 'SEARCH' and 'ADVANCED'. Below the search bar, there are filter tags: 'Clear all', 'Type Equal Failure', 'Status Equal Completed', and 'Customer Equal Gomocha'. A red box highlights a dropdown menu showing 'Gomocha Completed Failures' with associated delete and save icons. Below this, there is a 'MAP' button and an 'Export to excel' button. The main area is a table with columns: Order number, Status, Customer Name, Type, Planned start date, Planned SLA end, Description, Customer reference num..., Reported date, and Du. The table contains five rows of data, all with a status of 'Completed' and a type of 'Failure'.

Order number	Status	Customer Name	Type	Planned start date	Planned SLA end	Description	Customer reference num...	Reported date	Du
2367584:1	Completed	Gomocha	Failure	1/17/2024 2:54 PM				1/17/2024 2:54 PM	00
2367587:1	Completed	Gomocha	Failure	1/17/2024 2:55 PM				1/17/2024 2:56 PM	00
2367592:1	Completed	Gomocha	Failure	1/17/2024 3:01 PM				1/17/2024 3:01 PM	00
2367602:1	Completed	Gomocha	Failure	1/17/2024 3:08 PM				1/17/2024 3:08 PM	00
2367608:1	Completed	Gomocha	Failure	1/17/2024 3:13 PM				1/17/2024 3:13 PM	00

# Applying Saved Searches to Widgets: Query Grid

Size  
3x4

Use translation

Title  
Gomocha Completed Failures

Query  
Gomocha Completed Failures

Grid  
Gomocha Completed Failures

SAVE CANCEL

FMP360 Portal - GoTraining

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**Gomocha Completed Failures**

Export to excel

Drag a column header and drop it here to group by that column

Order number	Status	Customer Name
<input type="checkbox"/> 2367584:1	Completed	Gomocha
<input type="checkbox"/> 2367587:1	Completed	Gomocha
<input type="checkbox"/> 2367592:1	Completed	Gomocha
<input type="checkbox"/> 2367602:1	Completed	Gomocha
<input type="checkbox"/> 2367608:1	Completed	Gomocha
<input type="checkbox"/> 2367615:1	Completed	Gomocha
<input type="checkbox"/> 2367626:1	Completed	Gomocha

1 - 20 of 97 items

All failure work orders

Export to excel

Drag a column header and drop it here to group by that column

Order number	Type	Status
<input type="checkbox"/> 2357352:1	Failure	Created
<input type="checkbox"/> 2358668:1	Failure	Created
<input type="checkbox"/> 2358674:2	Failure	Created
<input type="checkbox"/> 2358680:1	Failure	Created
<input type="checkbox"/> 2358680:2	Failure	Created
<input type="checkbox"/> 2358680:3	Failure	Created
<input type="checkbox"/> 2359133:2	Failure	Created
<input type="checkbox"/> 2360730:1	Failure	Created

1 - 20 of 155 items

**Test Timesheet**

David Mehtaer

Category	Value
Shift hours	55
Reported hours	30
Difference in hours	25

97 Orders  
30 Assets