

# Knowledge Base

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## Creating a dashboard and adding a databoard

Created: October 24, 2017 / Last updated: November 24, 2017 / Author: Nikolaj Deichmann

The best way to view any databoard is through your dashboard. Dashboards are a handy tool to maintain easy access to information that is relevant to you through floating boxes called 'widgets'.

This guide will give an introduction to dashboards and show how any user can create their own for the purpose of viewing databoards, but can also be used as a general introduction to the usage of dashboards.

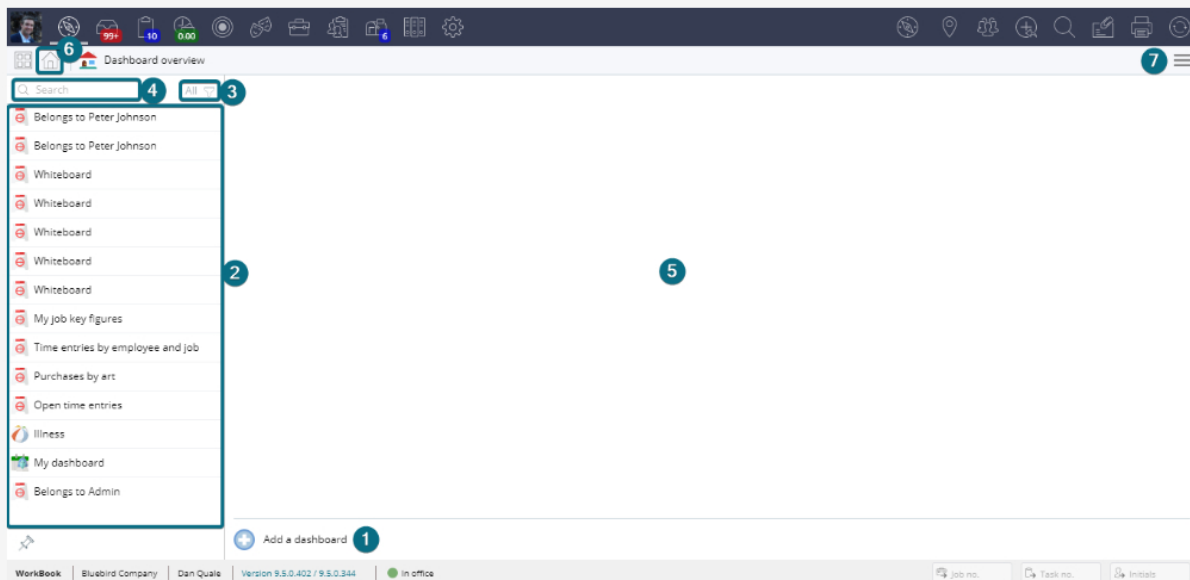
**Note that Dashboards and Databoards are NOT the same thing, but they go very well together.**

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- 2 Adding the databoard
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    - 2.1.2 Select databoard
    - 2.1.3 Filter

## Dashboard

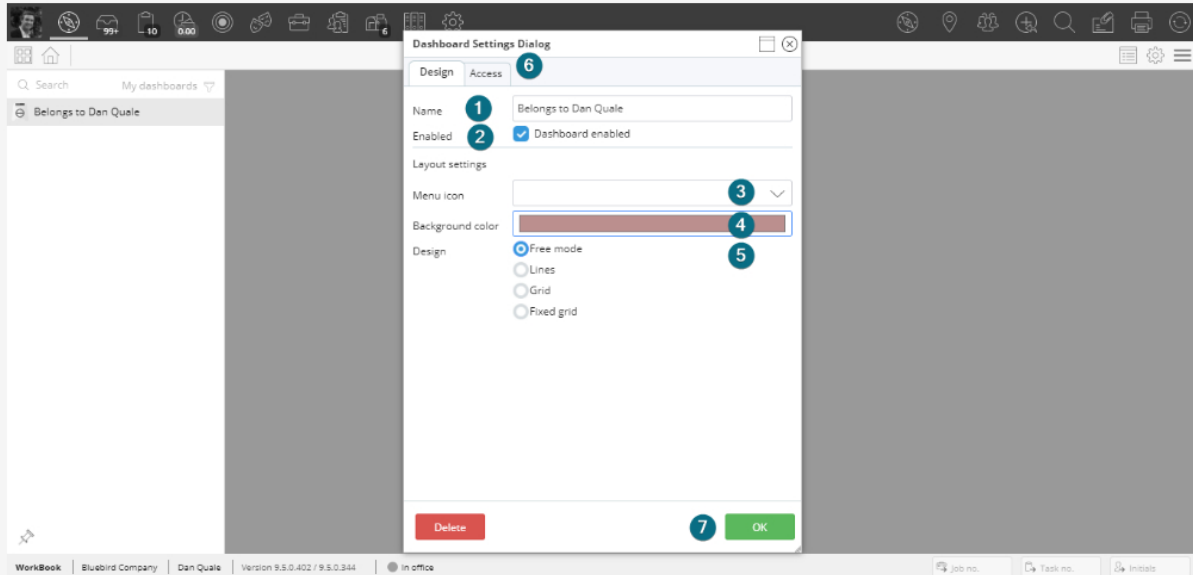
Before we go into creating the dashboard, here's a quick overview of the dashboard page.




1. Creates a new dashboard.
2. A list of all available dashboards. Some may belong to other users, you cannot change these. They're on your list because the owner wanted to share the dashboard with you.
3. Filter. Can be set to show only your own dashboards.
4. Search field to filter on dashboard names.

- The selected dashboard takes up this part of the screen.
- Home button clears the dashboard selection and returns you to this screen
- Context menu. Same options are given when right-clicking the dashboard directly in the list. It can be used to create new dashboards, duplicate the current one, and if you own the dashboard it also gives the option to delete it as well as accessing the setup of the dashboard.

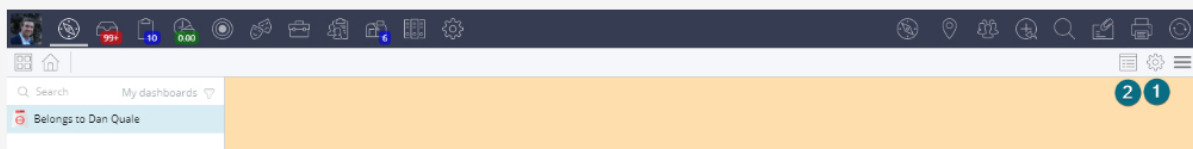
## Creating the dashboard



Pressing “Add dashboard” will open up the creation dialogue. It’s fairly straight forward, and not important. Everything can be changed later, so the default name is fine for now. Here’s a quick explanation of each item:

- Name the dashboard. A name that describes the function of the board is best.
- Enable databoard.
- Changes the dashboard icon in the list. Every icon in Workbook is available, but this is the default:  ReplacementIcon.svg
- Background colour, sets the background colour of the dashboard. The default colour changes every time you create a new dashboard.
- Design, what type of grid used. Your widgets will snap to the grid unless you use Free Mode.
- The Access tab is where you share your dashboard with other users. You can add users by their initials. Users added will have the dashboard appear in their list, but they won’t be able to change anything. They will view it as you’ve set it up. The only way to hide it is to change the filter to show their own dashboards only, so please be mindful of how many dashboards you share with others.
- Confirm setup or delete the dashboards.

Once the dashboard is created, you’ll have two new buttons at the top of the screen.



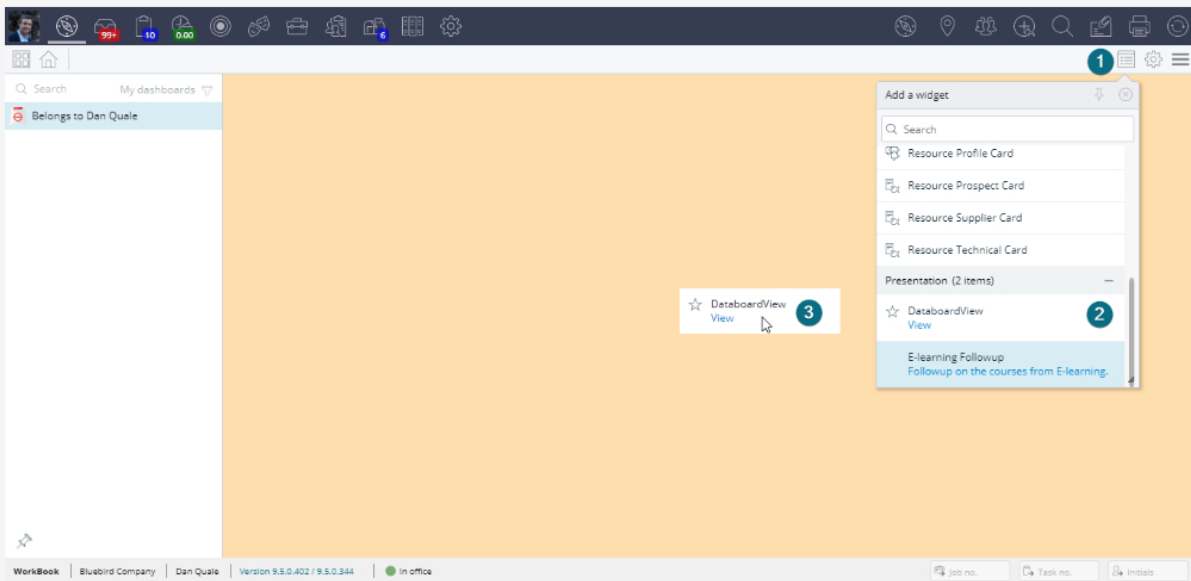
- This button opens the settings again, where you can change everything you could at creation, so you can update access settings, colours, names, icons. etc.
- This is the widget menu, which is where we’ll find the databoards.

## Adding the databoard

First off, what IS a databoard? It's a presentation tool that can be used to arrange data into diagrams, graphs or simple spreadsheets. Much like reports, the primary difference being that you view them on your dashboard instead generating a pdf. An example application of this could be running a big screen in your office with a live feed of everybody's workload.

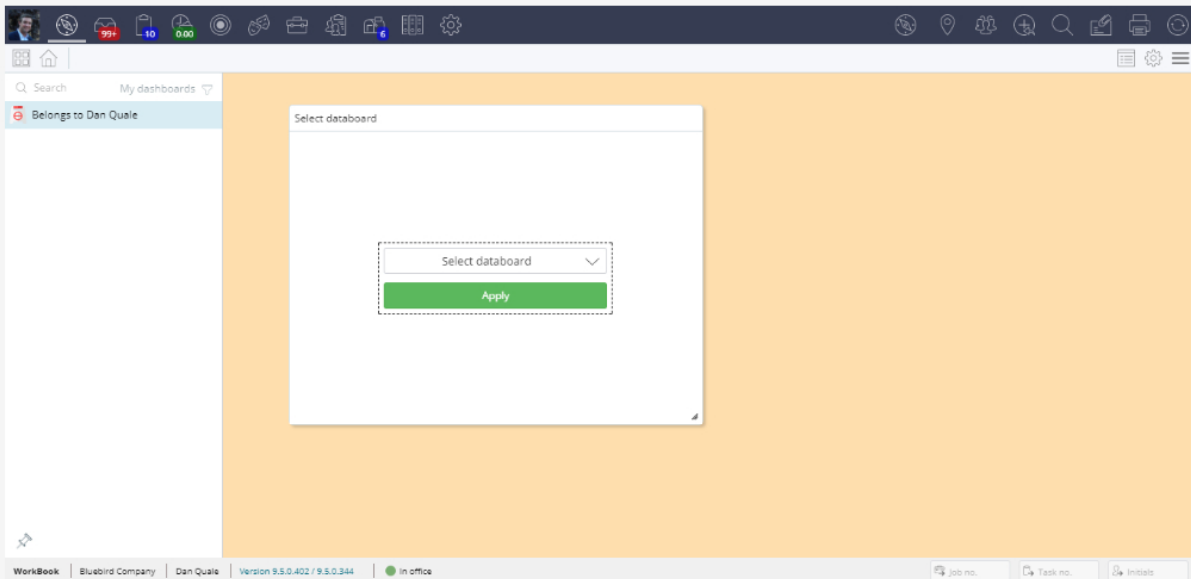
The databoard is contained within a **widget**. Widgets are resizable floating boxes that can be placed freely within the dashboard.

How to do so:



1. Open the widget list.
2. Scroll to the bottom and find DataboardView
3. Drag & drop the DataboardView onto the dashboard using your mouse.

It should now look like this:

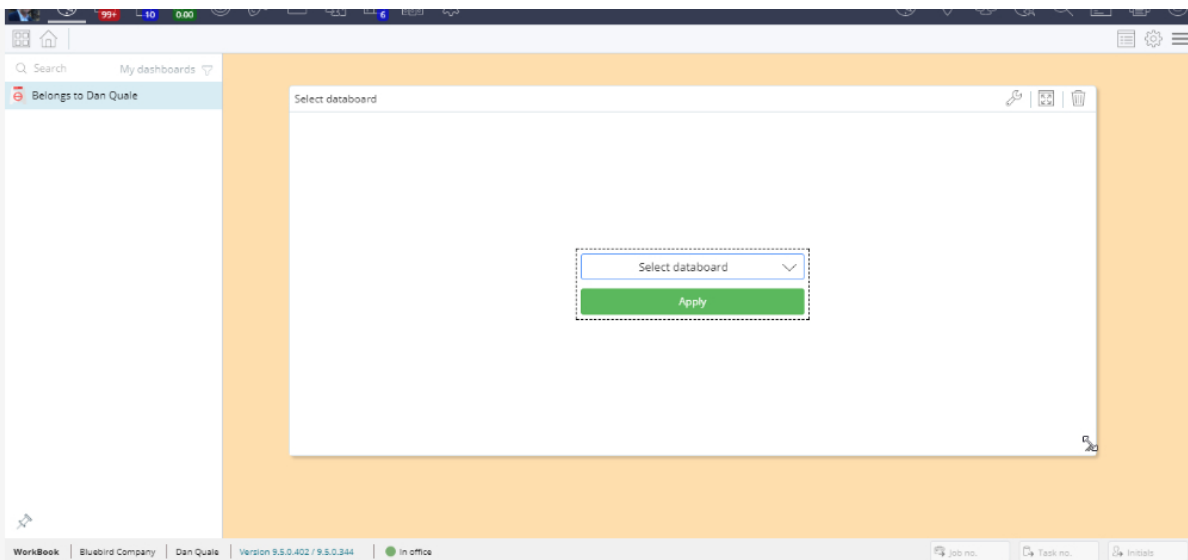


## Configuring the databoard

### Resize

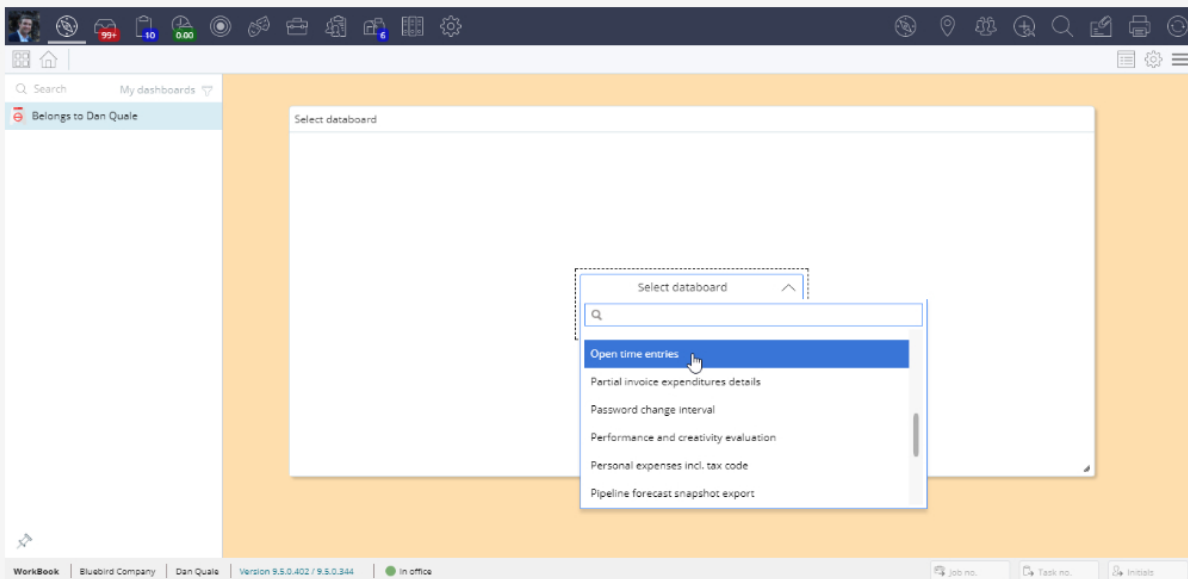
Resize the widget to see more of the databoard, you can also keep it small to make room for multiple databoards. You can then set one of them to full-screen and switch between them as a handy presentation kit.





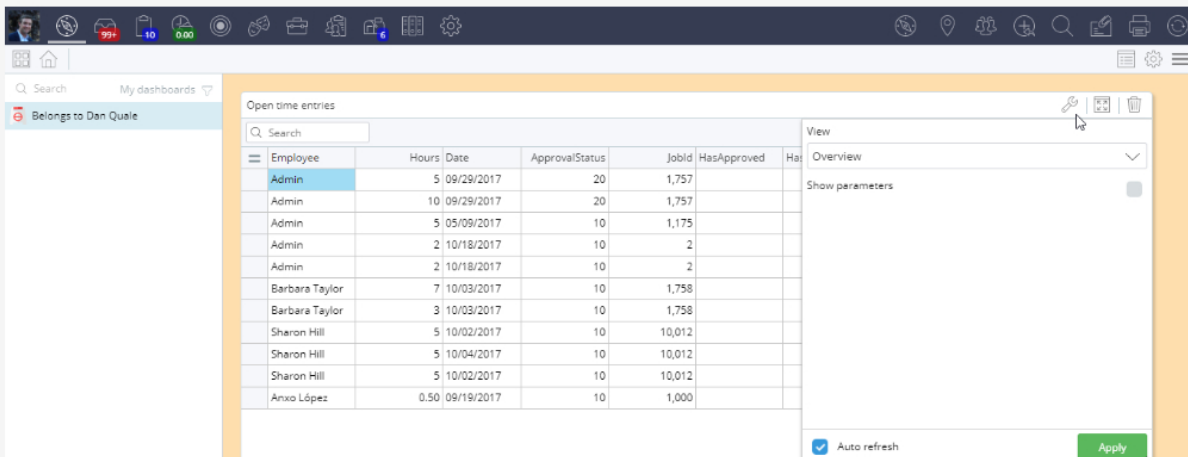
## Select databoard

You can only select databoards that you have access to. If the list is empty, ask a system administrator to extend access to you. If in doubt, show them this [guide](#).



## Filter

Most databoards require a filter to be setup, but they will often have a default filter to work right off the bat. The filter is found under the wrench that appears when mousing over the widget.







The databoard will update every 5 minutes if "Auto refresh" is enabled. This can be used to keep a live feed of the databoard, for example on a big screen.

Was this article helpful? Useful Useless 2/8 found this article helpful.

Tagged: [Dashboard](#) [Databoard](#)

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# Knowledge Base

Home / Knowledge Base / Customer portal

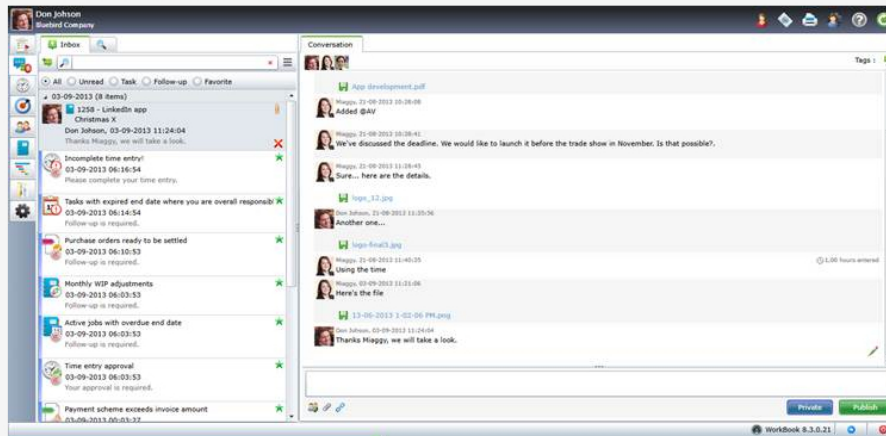
## Collaboration in the portal

Created: December 12, 2013 / Last updated: July 7, 2014 / Author: René Praestholm

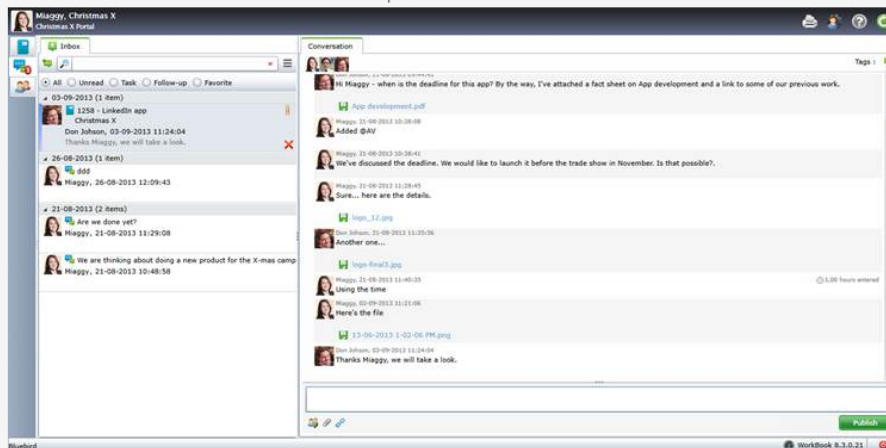
You can collaborate with your colleagues and clients by creating conversations and write comments and at the same time include files you want to share. New comments will automatically appear as unread comments in the Conversation window, where you can reply.

## Collaboration in the portal

Conversations as seen from Workbook:



Conversations as seen from the Customer portal:



**Private comments:** when you add a new comment, you have the option to reply privately. You only need to use this option if you have your customers working in the system through the Customer portal and you want only your **internal employees** to see your comment. **Private comments are only shown to employees.**

 Jennifer Lewis, 02-04-2013 13:36:01  
Good work you guys. I look forward to see the ads. Meanwhile, check out how Songhai Sushi is promoting themselves...  
[Songhai Sushi ad](#)

 Peter Johnson, 05-04-2013 12:56:55  
Indeed! 


A private comment....

   Private Publish

Was this article helpful? Useful Useless 0/0 found this article helpful.


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## Agency Management Software, Simplified

Deltek WorkBook lets you manage all your agency operations in one streamlined solution.

[See WorkBook in Action >](#)



### Take A Look At WorkBook

First Name	Last Name	Email Address
Griffith Foods International Inc.	Job Title	
Business Phone	Country	

Please email me about news, products & research from Deltek.

[See WorkBook in Action >](#)

**69%**

of agencies admit to using guesstimates when producing project plans!

### Let Project Data Drive Agency Operations – Not Guesstimates!

WorkBook puts all of your operational data right at your fingertips - letting you make faster, more reliable decisions about what's next for your agency. How much more dynamic could your team be with the right information?

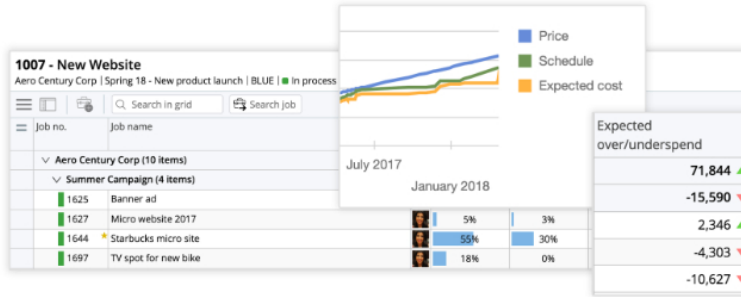
#### Bring in Better Business

Know what business to pursue and when with precise pipeline health data.

Client	Price quote net revenue	Remaining amount	Previous revenue	Revenue YTD	Forecast	
					JAN 2018	FEB 2018
Total: (97 items)	12,747,181	12,485,612	645,674	11,507,346	138,100	

with precise pipeline health data

Company	Job	NRF Responsible	Price quote net revenue	Remaining amount	Previous revenue
AAA Inc. @316		Barbara Taylor @BT	54,750	54,750	17,750
Abraxas Petroleum Corp ...		Jeff Turner @JT			54,750
ACI - Airports					1,500
ACME Finance					
	1626 - Website developme...	Jeff Turner @JT	19,000	19,000	

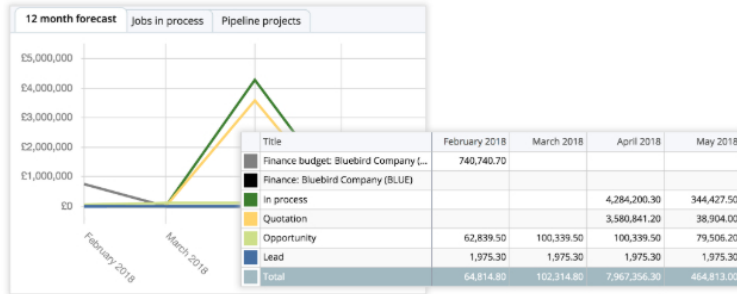


### Stop Over-Servicing & Scope-Creep

Increase efficiency, reduce costs, and scope accurately with enhanced project visibility

### Be More Proactive and Less Reactive

Make better decisions about your agency's future with trustworthy KPI tracking



Resource	2019							
	July							
	11	12	13	14	15	16	17	18
Sharon Hill		106%	∞%	∞%	106%	100%	100%	100%
SJY Sarah Jessie Yearly								
Paul Green					75%	75%	75%	69%
Nancy Ramos		75%			75%	75%	75%	75%
Jack Brundy	75%	75%			75%	75%	75%	75%
George Baker								
Freelancer	75%	75%			75%	75%	75%	75%
Ethan Smith					75%	75%	75%	75%
Don Smiths	75%	75%			75%	50%		

### Make Capacity Planning a Breeze

Allocate your people and your projects seamlessly together

Trusted By:



Take a look at WorkBook

See WorkBook in Action >



# Tutorials



## Welcome the Tutorial section

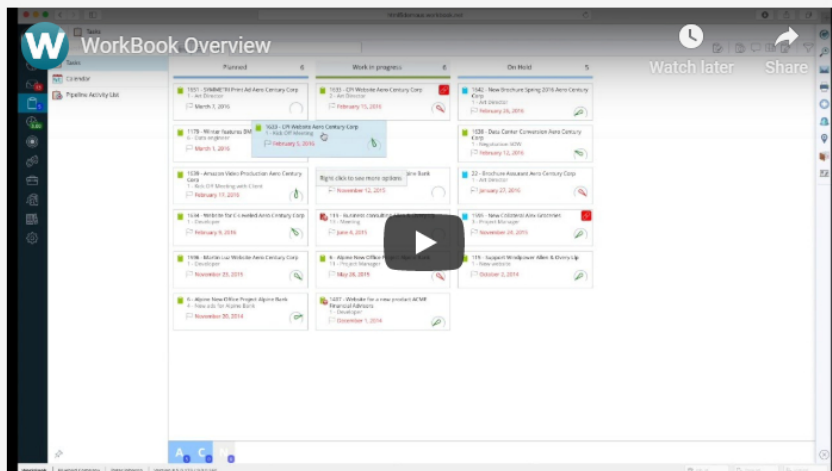
Here you will find small videos explaining little parts of WorkBook V9 – together they make a whole.

### Overview

To get a quick overview of some of the features of WorkBook take a look here.

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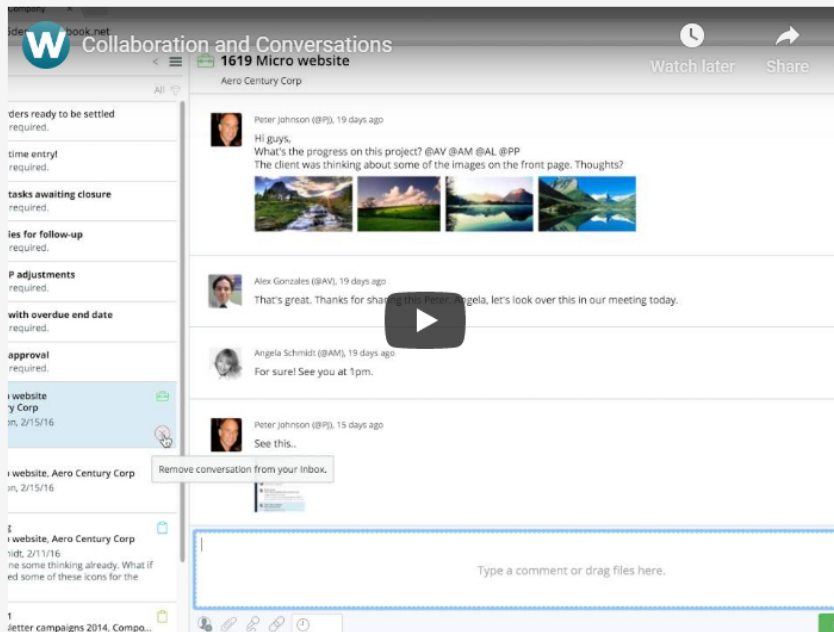
## Inbox & collaboration

The Inbox is where you probably always start your day. From here you can collaborate on tasks, tickets or jobs.

Watch these three videos to get a quick overview of the features of the Inbox.

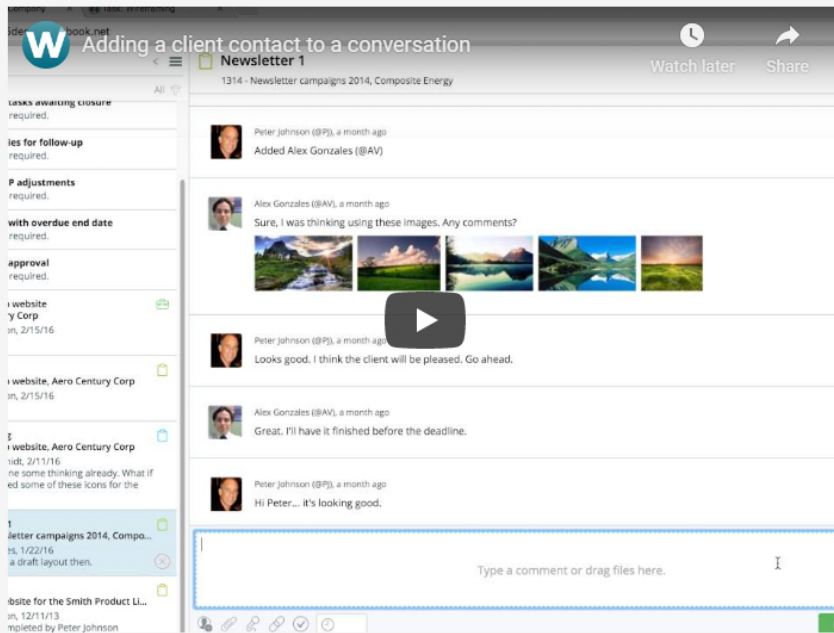
## Collaboration and conversations

The basic intro to how the Inbox works.



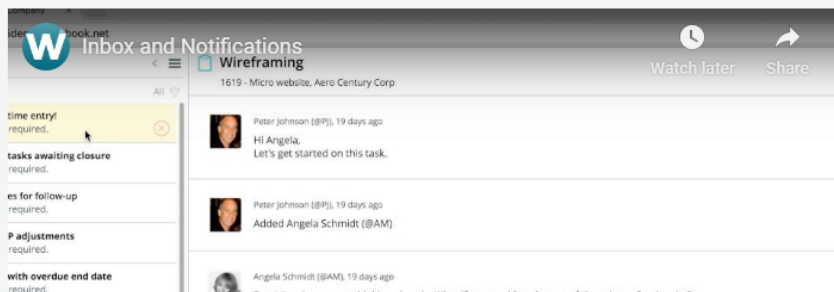
## Adding a client contact to a conversation

Do you need to add a client contact to a conversation or task? This is how!



## Inbox and Notifications

You will receive a lot of different notifications in your inbox. Here's an intro.







## Tasks & scheduling

Your to-do list is one of the essential parts of WorkBook. In Version 9 we made it even easier to register time on your tasks.

### To-do list and time entry

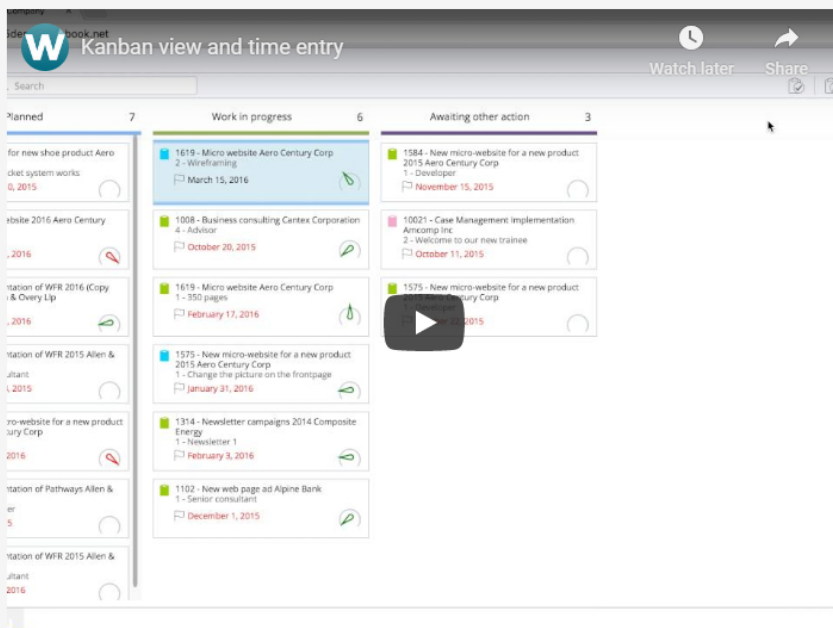
A quick overview of the to-do list and how to register time.

The screenshot shows the 'To-do list and time entry' interface. It features a search bar, 'Watch later' and 'Share' buttons, and a table of tasks. A play button is overlaid on the table.

Task text	Priority	Booked	Deadline	Client	My progress	
Micro-website for a new product 2015	2 - Medium	2.00/0.00	-131	10/23/15	Aero Century Corp	Awaiting other action
Micro-website for a new product 2015	2 - Medium	4.00/0.00	-106	11/16/15	Aero Century Corp	Awaiting other action
Micro-website for a new product 2015	2 - Medium	1.00/0.00	-71	12/21/15	Aero Century Corp	Parked temporarily
Micro-website for a new product 2016	2 - Medium	1.00/12.00	-36	1/25/16	Aero Century Corp	Parked temporarily
Micro-website for a new product 2016	2 - Medium	2.00/1.00	-29	2/1/16	Aero Century Corp	Planned
Micro-website for a new product 2016	2 - Medium	4.00/1.00	-4	2/26/16	Aero Century Corp	Planned
Micro-website for a new product 2015	2 - Medium	1.00/12.00	-29	2/1/16	Aero Century Corp	Work in progress
Micro-website for a new product 2015	2 - Medium	4.00/0.00	-12	2/18/16	Aero Century Corp	Work in progress
Micro-website for a new product 2015	2 - Medium	5.00/14.00	-15	3/16/16	Aero Century Corp	Work in progress
Letter campaigns 2014	1 - Newsletter	1.00/20.00	-25	2/4/16	Composite Energy	Work in progress

### Kanban view and time entry

Should you fancy a Kanban view, WorkBook offers this as well.

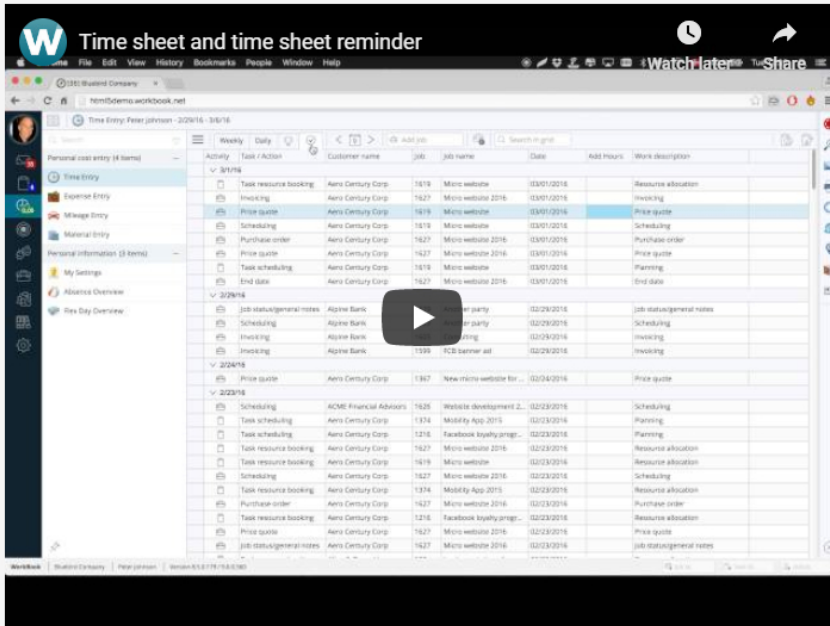


# Personal cost entry

The personal cost entry module is where you can do time registrations, expense entries and mileage entries.

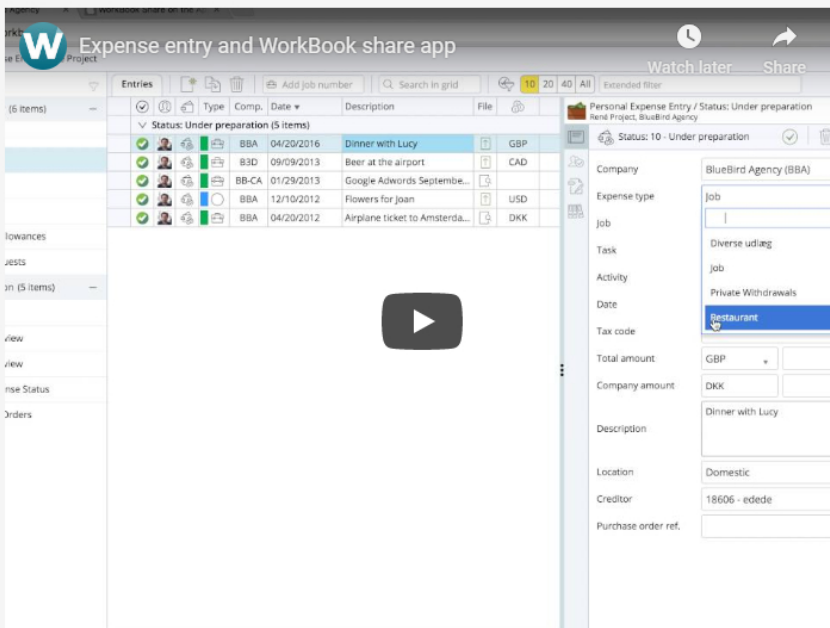
## Time sheet and Time sheet reminder

A quick overview of the Time sheet and it's functions.



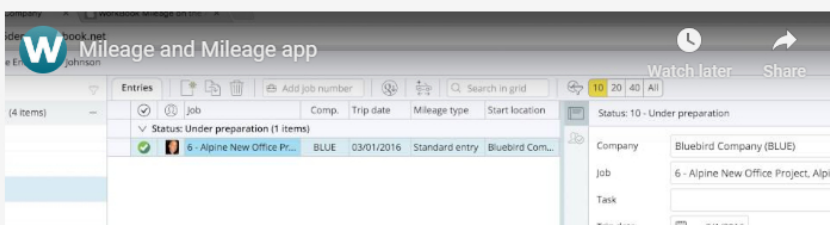
## Expense entry and WorkBook Share app

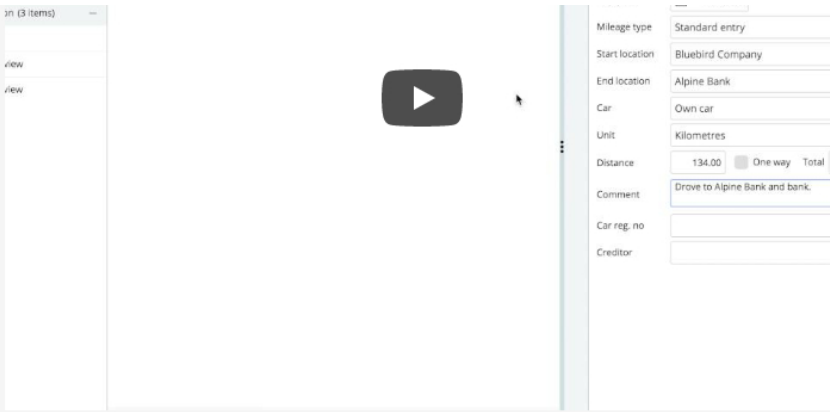
Upload expense entries via the WorkBook Share app.



## Mileage and Mileage app

Register mileage via our app.



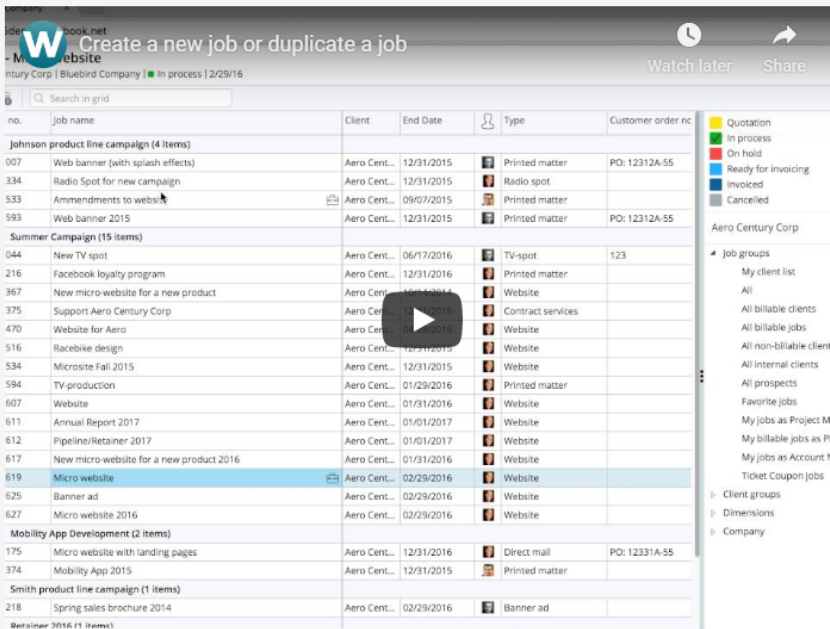


## Jobs

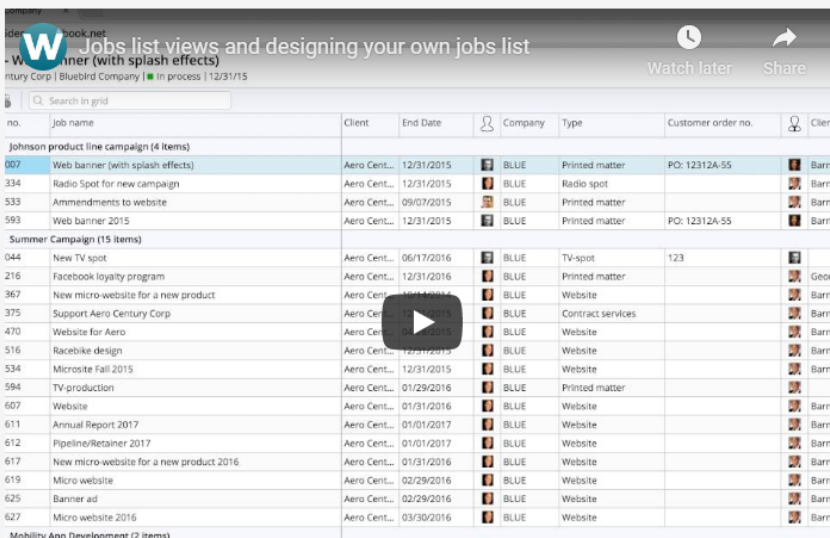
Jobs are how you handle your projects. Job can have plans with tasks (a schedule), price quotes, purchase orders, invoices and many more. This section of videos will give you a quick overview of how to deal with jobs.

### Create a new job or duplicate a job

This is the jobs 101 – creating a job.



### Jobs list views and designing your own jobs list



175	Micro website with landing pages	Aero Cent...	12/31/2016	BLUE	Direct mail	PO: 12331A-55	George
374	Mobility App 2015	Aero Cent...	12/31/2015	BLUE	Printed matter		George
Smith product line campaign (1 items)							
218	Spring sales brochure 2014	Aero Cent...	02/29/2016	BLUE	Banner ad		George
Retainer 2016 (1 items)							

## Create time plan and assign resources

The screenshot shows a software interface titled "Create time plan and assign resources". The main workspace is empty, displaying a message: "This document is empty. Import a document or drag one here." The interface includes a sidebar with a task list, a top navigation bar with "Watch later" and "Share" buttons, and a right-hand panel showing a list of resources.

## Create time plan and copy from template

The screenshot shows a software interface titled "Create time plan and copy from template". The main workspace contains a large play button icon, indicating a video or media player. The interface includes a sidebar with a task list, a top navigation bar with "Watch later" and "Share" buttons, and a right-hand panel showing a list of resources.

## Create time plan from price quote

The screenshot shows a software interface titled "Create time plan from price quote". The main workspace displays a calendar view for the period from February 29 to March 13, 2016. The interface includes a sidebar with a task list, a top navigation bar with "Watch later" and "Share" buttons, and a right-hand panel showing a list of resources.

Set current schedule as inactive
  Insert only new lines (activity already exists)

## Create price quote from scratch

W book.net  
 - Micro website 2016  
 Century Corp | Bluebird Company | In process | 2/29/16

Create new price quote

Date: 03/01/2016 Language: English - North America

Title:

Price quote:

Headline: Job 1627 - Micro website 2016

Copy from:

Nothing

Currency: USD - US Dollars

## Create price quote from copying another quote

W book.net  
 - Micro website 2016  
 Century Corp | Bluebird Company | In process | 2/29/16

### Price quote

A price quote has not been created for this job. Click on the button below to create a new price quote.

## Create price quote from template

W book.net  
 - Micro website 2016  
 Century Corp | Bluebird Company | In process | 2/29/16

1093 - Price quote - website - Aero Century Corp

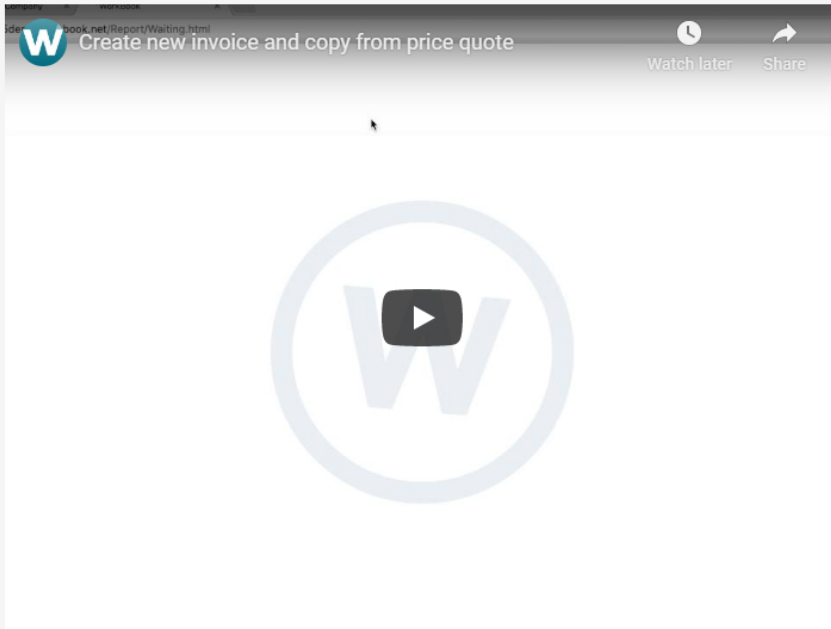
Name	Description	Amount	Page break
Start			None
Wireframing	Contrary to popular belief, Lorem Ipsum is not simply random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Latin professor at Hampden-Sydney College in Virginia, looked up one of the more obscure Latin words, consectetur.	4,150.00	None
Employment/contract routine	Literature from 45 BC, making it over 2000 years old. Richard	640.00	None

Item	Description	Quantity	Unit Price	Total Price	Cost	Margin
Testing	Contrary to popular belief, Lorem ipsum is not simply a bunch of random words. It has roots in a piece of classical Latin literature.	6	1,000.00	6,000.00	None	
Going live	College in Virginia, looked up one of the more obscure Latin words, consectetur.	3	1,000.00	3,000.00	None	

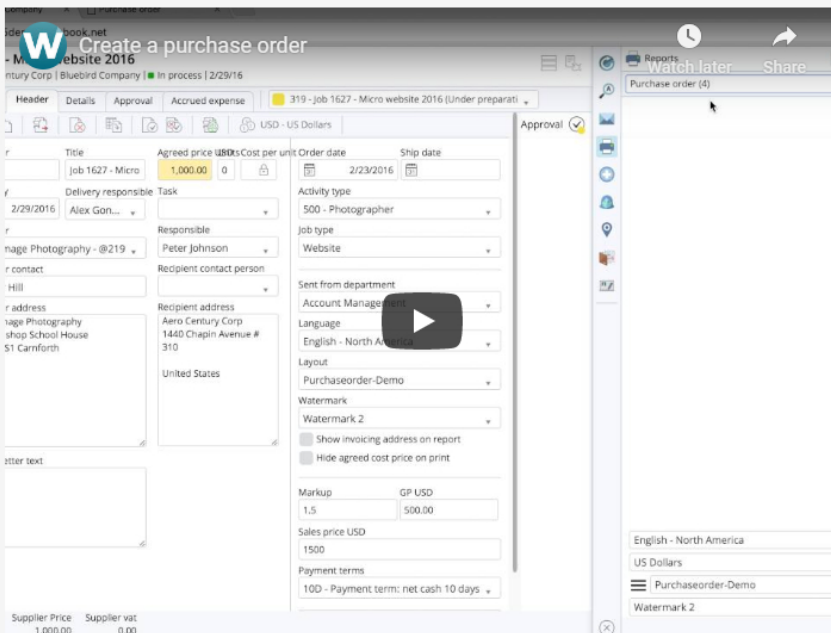
  

Total USD	Total Hours	Weighted average rate	Currency	Total	Purchase	GP	GM	Internal cost
14,710.00	124	117.50	USD	14,710.00	30.00	14,680.00	100%	6,800.00

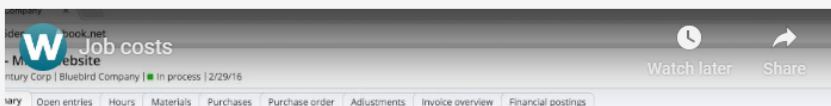
## Create new invoice and copy from price quote



## Create a purchase order



## Job costs





view - activity

Search

Accounting	Schedule	Price approved	Expenditure hours	Expenditure materials	Expenditure purchases	Expenditure purchase orders	Expenditure adjustment	Expenditure total	Invoice
<b>Activity summary: (7 items)</b>									
00 - Art Director	USD	2,760	1,460	600				600	
10 - DTP	USD	580							
20 - Project Manager	USD	600	6,260						
35 - Account Manager	USD	600							
45 - Developer	USD	960	6,700	480				480	
60 - Freelancer	USD	2,970	1,500						
00 - Purchases	USD					2,250		2,250	
<b>Summary: (2 items)</b>									
total	USD	7,870	16,520			2,250		3,330	
gross profit	USD	7,870	15,520	1,080			750	1,830	

## Reports

### How to do a PDF of a time plan

This guide shows you how to print a PDF of a time plan but the general principle of printing a report is universal in WorkBook.

The screenshot shows the WorkBook interface with a Gantt chart on the left and a Reports menu on the right. The Gantt chart displays tasks like 'Wireframing' and 'Testing' with their respective durations and assigned users. The Reports menu is open, showing various report options such as 'Gantt chart 8 weeks (39)', 'Gantt view 4 weeks (392)', and 'Schedule List Simple (504)'. The 'Schedule List Simple (504)' option is highlighted.

### Report Editor

The Report Editor is a powerful tool to create or customize your own reports and have them just the way you wish.

The screenshot shows the Report Editor interface. The main area displays a report template with various fields and sections, including '[RecipientLabel]', '[Headline]', '[Introduction]', '[PhaseName]', and '[PhaseDescription]'. A Properties panel on the right allows for customization of the report's appearance, including background color, border color, border dash style, border width, font color, and padding.

[PhaseName]	[LineAmountNet]
GROUPFOOTER1	
[TotalExcText]	[AmountNet]
[TotalExcText]	[AmountVal]

Text Alignment Top Left

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# Welcome to the WorkBook Knowledge Base

Use the search option below or click on a category.



## Knowledge base

This space contains all help articles grouped into categories. A good choice if you are not sure what you are looking for.



## FAQ

Check out the FAQ for a list of frequently asked questions.



## Tutorials

Looking for tutorials and videos of WorkBook in action? You've come to the right place.



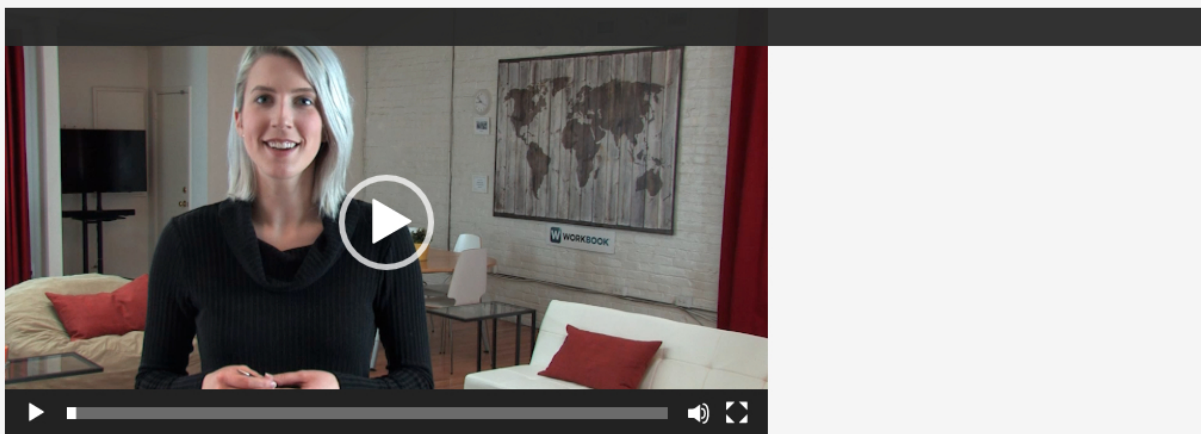
## New users – start here

If you are a new user we suggest you get a short introduction. Start your training right here via our roled based videos.



## Admins – start here

This index page with link to all the articles that will be useful for a Systems Administrator handling a WorkBook installation



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