Aptify®

Views and Dashboards Services

Aptify Views and Dashboards Services

Duration 4-6 Days

Aptify will start promptly at 9:00 am and end at 5:00 pm each day. There will be a 15 min morning and afternoon break and an hour lunch break each day. Onsite personnel will work with various departments throughout the day on an as needed basis. Every effort will be made to accommodate the client's schedule while ensuring each department has the necessary time to initially meet, discuss, revise, and finalize all built views and dashboards.

The Aptify Trainer will contact the client's IT department two weeks prior to the onsite portion of the service to:

- Request an outline of the Views that they need from each department

- Request access to the client's test database to begin outlining the structure of Views/Dashboards

Depending on the length of the service purchased, anywhere from 4-6 days, Aptify will interview as many departments as possible and build:

1. A minimum of a Home dashboard for each department and a maximum of 2 unique, Application level dashboards per department in addition to a Home dashboard.

2. A minimum of 3 and a maximum of 5 views per main Service used by each department.

3. A minimum of 4 Total and a maximum of 8 Multiple Base Views.

Service Outline

Aptify will perform the following operations onsite with the client:

1. Interview/gather requirements from client designated departments/functions for Views & Dashboards

   - Initially done remotely for one total days' worth two weeks leading up to the onsite portion

   - Conducted secondarily in face to face sessions on the first onsite day

2. Create Shared Folders for each Department and train a designated staff Admin to oversee

3. Build useful Views:

   - Place Core views in folders

   - Test to ensure data accuracy

   - Consolidate existing views and upgrade to full Aptify functionality

   - Build additional views in sessions with staff

   - Build critically needed base views

4. Build Useful Dashboards

   - Meet with each Dept. to outline which buttons/views desired

   - Assign a Home dashboard to each designated Dept.

   - Ensure Group and User security settings are enabled correctly

5. Create an IT centric manageable framework of Views and Dashboards

   - Create Dashboard views and train IT on how to maintain those Views

   - Manage existing Application dashboards with IT

Proposed Schedule

Depending on the length of the service purchased, days 4-6 will be condensed, into shorter time-periods. The Aptify Trainer will create a specific agenda for the length that is chosen.

Within Two Weeks prior to Onsite Portion (Days 2-6)

Day 1

Survey Sheets & Test DB Access

Send survey sheets on desired views and dashboards to each participating department. Aptify Training will also request remote access to the client's Test DB server to begin mapping out the items to be built as well as to familiarize themselves with the configurations and differing services the client may have implemented.

Onsite
Day 2 - Setup

Interview each department in one-hour 'requirements gathering' sessions – will be much more effective if partially executed ahead of time through survey – which Aptify will provide - but will additionally be conducted face-to-face to gather data more effectively/completely.

9:00-2:00: One-hour sessions with each department

2:00-5:00: Sketch out/outline/begin building 5 top views and buttons/views needed for home dashboards

Day 3 - 4 Build the Views

Build each departments' top 5 Views. Including Base Views, Prompted Views, Grouping, etc. This will require some interaction with staff from time-to-time and will be done onsite to accommodate.

Once the Views are completed: 1-2 Hour sessions with each department to review views and test for data accuracy, desired fields, etc.

Once confirmed: views will immediately be placed in Shared Folders. Can modify existing views if partial functions present. As the FINAL step of every session, each user will log into Aptify and make those views Shortcuts/Favorites.

Day 5
Build the Dashboards

Dashboard building – build each department's Home dashboard. Meet with each department and ensure buttons and views embedded in dashboard meet satisfaction.

Day 6

Trash Day and IT Training

9:00 – 11:00: Take out the trash - Users will create a trash folder, open the Folder List (TEMPORARILY!), and drag into their trash folder ANY views they do not/have not ever used. Users will then delete the trash folder. This will be repeated for every accessible service. Users will also disconnect from any shared folders not in use.

11:00-2:00: Application Dashboard cleanup – Aptify will go through Application dashboards and delete unnecessary items. This can be done with staff representatives from each department and/or IT staff.

2:00 – 5:00: Aptify will set up views that can be leveraged by IT to quickly access dashboards. Views service views (Find View by Owner, Name, ID) will be setup and shortcuts created for IT. Aptify will demonstrate how to transfer Views & View folders via EBOs (create those EBOs if necessary). Aptify will talk about the use of Department level Admins/Super Users to maintain department level folders of views.