# Allied Central Dashboard

## User Guide

For use with application release of May 13th, 2021

# Contents

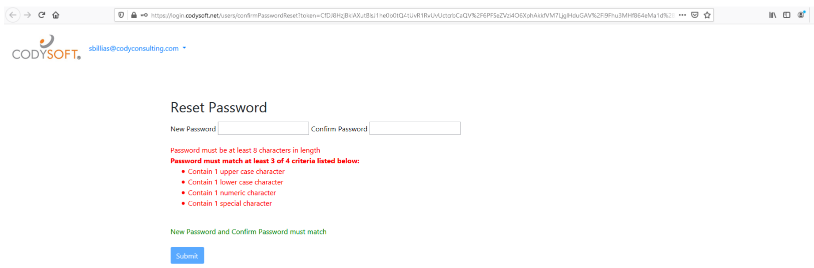
# Accessibility

After you are added as a user in the ACD Module®, a username and temporary password are emailed to you for your  initial login to the system.

## Logging in for the first time

CodySoft® sends you a confirmation email when you are first added to the list of registered users at the start of a project.

1. From the confirmation email, click the link to confirm your email address. When you log in for the first time, you are prompted to create a new password.




2. In the New Password field, enter a **new password.** Follow the instructions for meeting the password requirement.
3. In the Confirm Password field, enter the **new password** again
4. Click **Submit.** The login screen displays.
5. Enter your **user name**
6. Enter the **password** you just created
7. Click **Sign in**. You are logged in to the main dashboard of CodySoft.

**NOTE**: If your company uses Single Sign On (SSO) then you will not be asked to create a CodySoft password when you log in for the first time.

# Intro to Allied Central Dashboard

## Abstract:

This user's guide introduces the features and function of the Allied Central Dashboard. The primary purpose is to provide a comprehensive resource for users to refer to when learning to use the portal. An introduction to basic concepts serves as a foundation for conveying information about your jobs as they progress through the production process. This guide describes how the information is organized for both quick updates as well as more in-depth detail about each job. Finally, a 'how-to' section provides detailed instruction on dashboard usage.

## Nomenclature

Allied Central Dashboard terminology is straightforward. Features are labeled by their function. To expedite the learning curve and promote recognizability, these terms in the guide are emphasized in bold text, allowing the novice to build proficiency.

# Introduction to Concepts

## Data Hierarchy

The Allied Central Dashboard is a versatile portal designed to provide comprehensive information about jobs submitted to Allied Services as well as alerts should something go wrong. It is powered by an automated workflow system that executes pre-defined steps and makes decisions on what actions to take based on the inputs provided and the outcome of each step.

Data supporting the steps is organized in a four-level hierarchy.

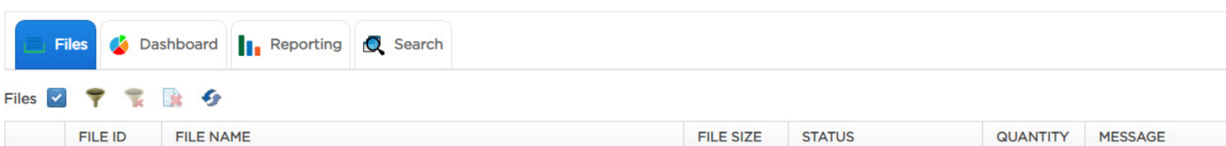

**File Level**: This is the driver file you provide that is used to generate output. For example, Member Requests are generally delivered in a CSV or Excel file with member names, addresses, and requested materials.

**Job Level**: Each driver file generates one or more jobs within the automate workflow. This level provides a view of the when the job is created, its status and SLA.

**Job Details Level**: While related to the Job Level, this level provides more detailed information relative to the characteristics of the job. For example, it indicates the output and how many units were received, rejected, and approved (passed validation).

**Record Details Level**: Many jobs generate communications that are sent to your members. As such the records are ingested from the driver file and details of each record are viewable at the Record Details Level.

In the stream of data processing, the pyramid diagram displays the hierarchy of data in the system. These Levels of Data have a direct relationship with the **Portlets** on the **Files and Search Tabs**.




After a File is received, it is visible in the **Files Portlet**. When selecting a file from the list, it is highlighted in blue and opens the corresponding record in the **Jobs Portlet**. After selecting the Job, the Job Details are visible in the **Job Details portlet**, and subsequently, the record details are visible in the **Record Details Portlet** when a row in the Job Details is selected.

Allied Services has designed the views of data at each level to be just the most relevant fields for quickly communicating information to you. There are many other fields that can be captured, organized, and shared. Further, each Portlet supports searching, sorting, and filtering for most fields. So, if there are additional data items or features you need apart from the basics, please let us know.

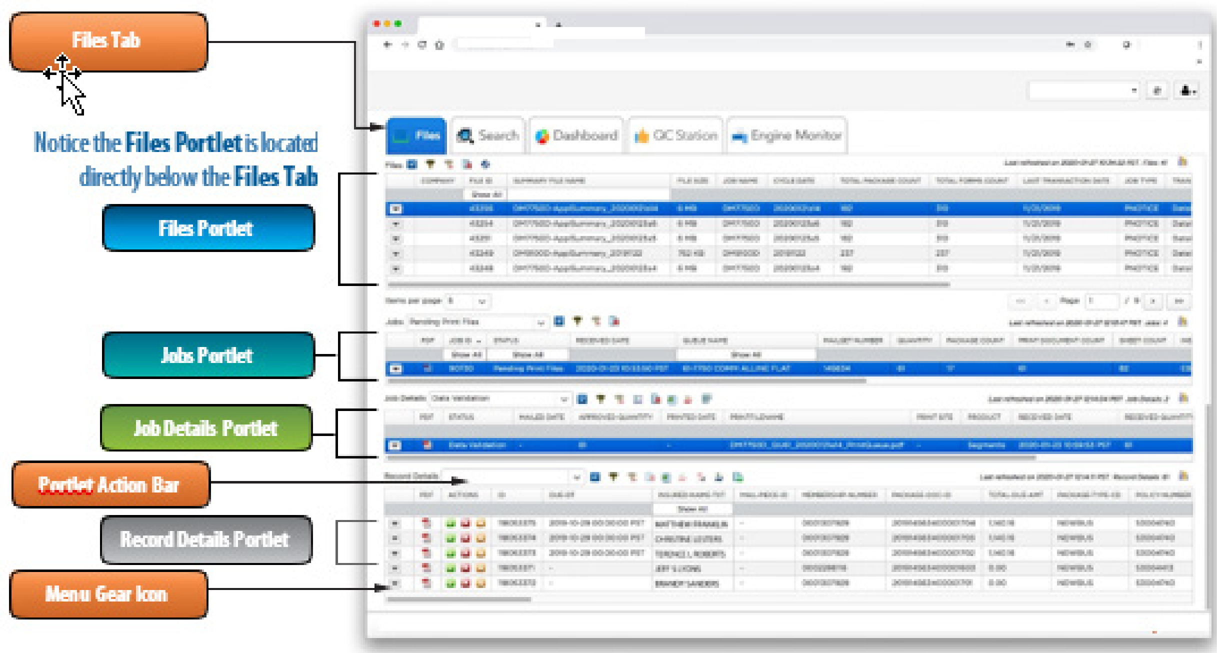
Portlets also interactive capabilities such that you can store information about files, jobs and records in user comments and/or work directly with the job. For example, the Dashboard supports Review-and-Approve processes, job and data archival, and file/job/record deletion.

## Automated Workflow and Data Validation

When files are received and jobs are run, the automated workflow typically performs validations on several levels. If all validations pass, the job, for example, is sent to operations for print or mail services. When complete, audit (and often shipping) reports are provided that are automatically linked back to the jobs and records. In this way, you have a comprehensive view of what was sent and when.

When jobs do not complete as planned, you need to have sufficient information on-hand quickly to react appropriately. The Allied Central Dashboard not only displays information on the dashboard that describe the issues, but automatically sends email alerts to as soon as the issue is encountered. These emails provide sufficient information to guide you back to the dashboard to view additional information.

## Allied Central Dashboard: The Files Tab | PDF Editor | Proof for Approval | Approve & Reject Status

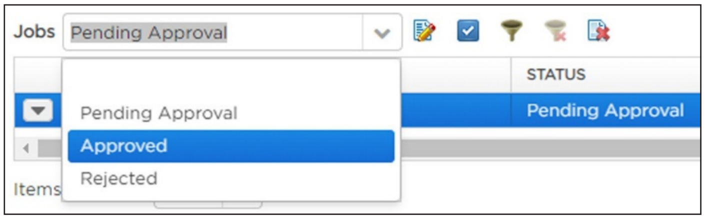



## Email a PDF for Approval

By sending a PDF for approval, the recipient will receive an email with  a Personal URL (PURL), which links back to the PDF file in the system.

## Manually Change Job Status: Approve or Reject

As a **File** moves through the **Workflow**, a **User** can manually alter the **Status** on the **Files Tab** with the **Portlet Action Bar**. To locate the **File** that is ready for **Approval** or **Rejection**, a **User** can sort the list by clicking the **File ID** column or the **Received Date c**olumn. After selecting a **File**, when applicable each successive **Portlet** will be activated. Next, select the **Job** in the **Jobs Portlet**. Click on the **Portlet Action Bar** located in the **Jobs Portlet.** Select **Approved** or **Rejected** according to the chosen outcome:



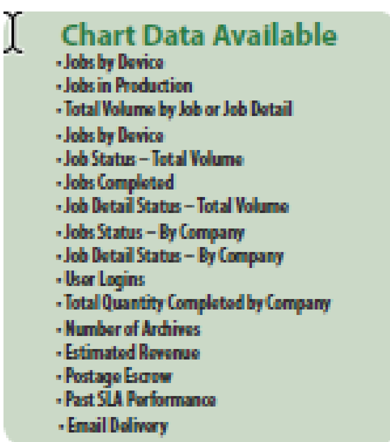

## Allied Central Dashboard: The Dashboard Tab

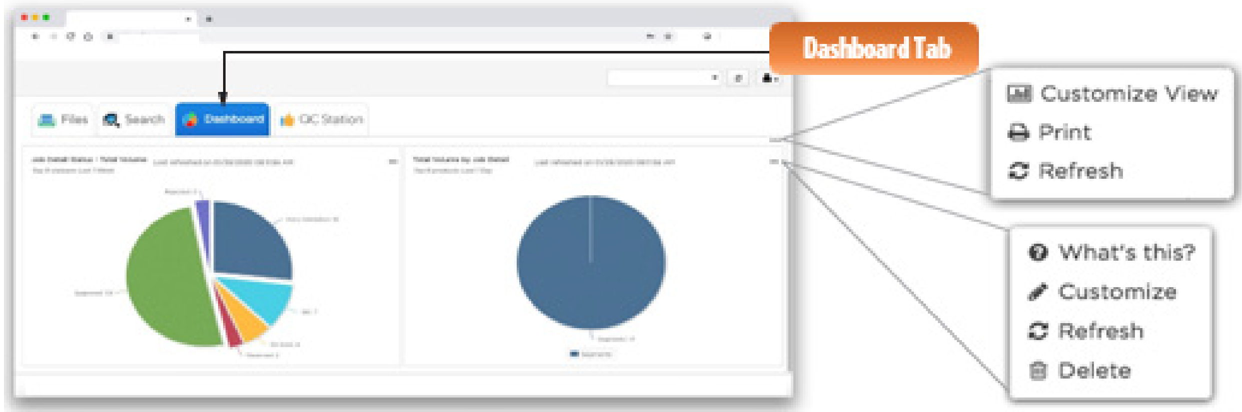
### The Dashboard Tab

An exhibition of charts, with data chosen by the **User**, each chart contains a legend with a list of variables located at the base. Every section of a chart is clickable. Once clicked, a separate window is prompted with all of the data about that specific section. (Visibility of a section of the chart can be removed by clicking the corresponding section in the legend.)

### The Dashboard Tab

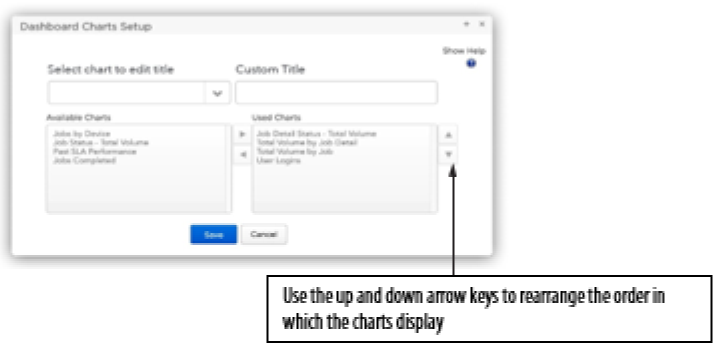
Hover over the ellipses icon (…) located in the top right corner. The **User** can modify the view on this **Tab** under the **Customize View** option. Other options on this drop-down menu include **Print** and **Refresh**. Additionally, every chart also contains the ellipses icon, for options applying only to this chart. Options include **What's This?**, **Customize**, **Refresh** and **Delete**. (See screen capture for the location of the ellipses icon, and the respective drop-down menu options.)






### The Ellipses Icon: Customize View

Selecting the **Customize View** option prompts the **Dashboard Charts Setup** window. (See screen capture below.) The **User** can select from any of the **Available Charts** on the left and move them to the right, to the **Used Charts** section, to make them visible on the **Dashboard Tab** screen.




## Allied Central Dashboard: The Reporting Tab

### The Reporting Tab

The **Reporting Tab** includes a collection of production reports de- signed to display metrics based on data the system is tracking. **Stored Procedure** Based Reports and SQL Based Reports can be generated in this **Tab**. The **Report Builder** button allows **Users** to create, edit, and delete reports. The **Reporting Tab** includes a collection of production reports designed to display information based on data tracked in the system. Reports are generated from queries to the **Dashboard** database. Please contact Cody to collaborate with engineers who can develop queries and provide you with **Stored Procedures** and **SQL Queries** to use in the report specification. The **Report Builder** button allows **Users** to create, edit, and delete reports.

### Report Builder

The **Report Builder** functionality allows generation and editing of **Custom Reports**. Certain configurations are available via the interface, **Report Building** is based on SQL queries.

### How to Build A Simple Report

1. Click the **Report Builder**
2. Click the **New** button
3. Enter the **Report Name**

4. Enter Query (Stored Procedure or SQL)
5. Validate Query
6. **Save** Report

## Validate SQL Query

To validate the SQL query or **stored procedure** associated with the **Custom Report**, enter valid SQL syntax into the textbox provided. Click the **Validate Query** button. A notification will appear letting you know if the query validated or not. If the query validated, the **Assigned Column** list will populate with the columns and names specified in the SQL query. A valid SQL query or **Stored Procedure** that validates is required to add a new **Custom Report**.

## User Functions of the Reporting Tab

The **Reporting Tab** contains **Sub Tabs** (**All Reports**, **Recommended Reports**, **My Custom Reports**) that provide quick access pertaining to the reports. **Users** are able to run, edit and schedule reports.

## The All Reports Sub Tab

This **Sub Tab** displays all of the reports created. Each report has a short- cut function to run a quick report, to edit and customize the existing query, and to schedule to a different date.

## The Recommended Reports Sub Tab

This will display all reports that are pertinent to the **User** role. This can be enabled in **Report Builder**.

## The My Custom Reports Sub Tab

The **My Custom Reports Sub Tab** displays all of the reports that have been created through **Customize Another Report**. **Custom Reports** can be scheduled to export report on a set date.

## Exporting Reports

Exporting **Reports** can be configured in the **Report Builder**. You can select the **Export** type from the drop-down. You can use export types Excel and PDF or both. Once you run the report, an option to export will be available.

## To Create New Report Group:

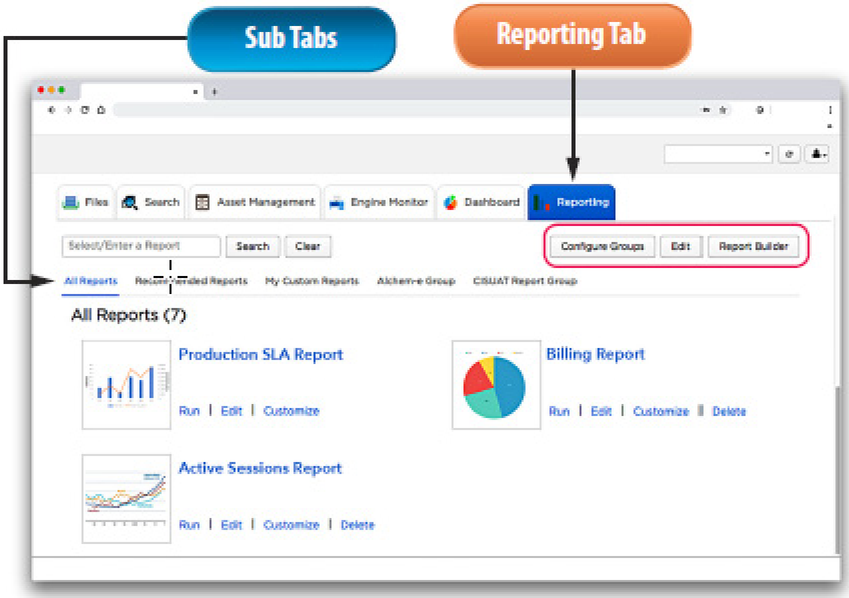
1. Click **Configure Group**
2. Click **New** button to open **New Report Group** window
3. Fill out **Group Name** (a description but it is not required)
4. Click **Save**

## To Edit Report Groups:

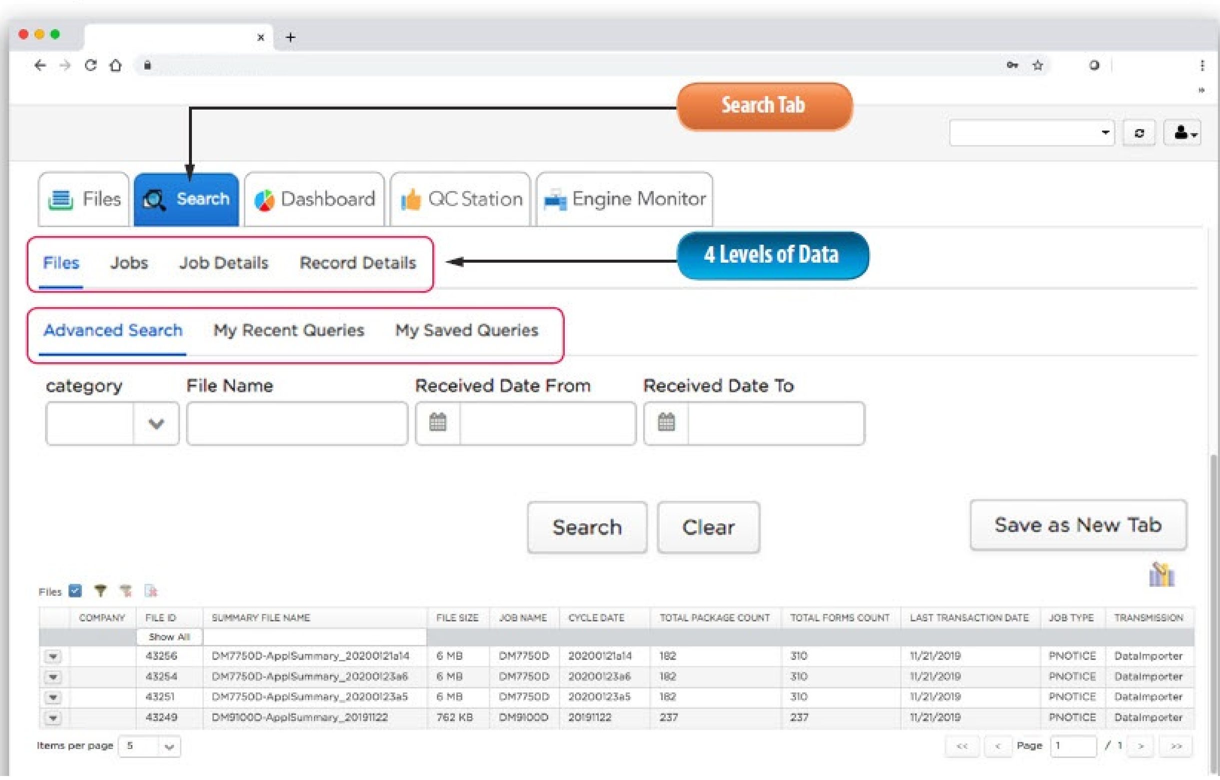
1. Select the **Group Name**
2. Click the **View/Edit** button to ope **Edit Report Group** window and make changes
3. **Save** the updated **Report Group**
4. To Edit **Report Group** Roles
5. Select the **Group Name**
6. Click **Edit Roles** to open the **Report Group Roles** window
7. Select one or more users in the **Available** column
8. Click the arrow right button to move users to **Assigned Roles**
9. Click **Save**

## To Delete Report Group:

1. Select the **Group Name**
2. Click **Delete** button
3. Confirm Deletion




## Allied Central Dashboard: Four Levels of Data & the Search Tab



## The Four Levels of Data and the Search Tab

The **4 Levels of Data** (**Files**, **Jobs**, **Job Details** and **Record Details**) are visible under the **Search Tab** as **Sub Tabs**. (See the default horizontal menu layout above.)

> Below the **4 Levels of Data** are (3) options:
> 1. **Advanced Search** - performs robust, multi-criteria search queries based on the **Level of Data**
> 2. **My Recent Queries** - a storage bank of every search query, from the most recent to the oldest
> 3. **My Saved Queries** - a list of search query results in which the **User** elects to save

## Running an Advanced Search

**User** must run an **Advanced Search** first, before the system begins automatically storing all search query results under **My Recent Queries**. A **User** may opt to save or delete a search query result, under **My Recent Queries**.

## Save or Delete a Search Query Result

To save or delete a search query result, navigate to the **My Recent Queries** view. Save a result by selecting the **Add to My Saved Queries**, in the **Action** column. (Exclusive to the **Advanced Search** based on **Record Details**, a **User** can elect to **Save Query**.) In all events to **Save**, a new window is prompted where the **User** can name the query result and click the **Save** button. Delete a search query result by selecting the **Remove from My Save Queries**, in the **Action** column, or selecting the **Trash Bin** icon. (See screen capture below.)


| | QUERY NAME | QUERY | PRODUCT | LAST ACCESSED | ACTION |
|---|---|---|---|---|---|
| | Record_Save | {"accountNumber":["contains","0"]} | | 2020-01-05 17:33:12 EST | Remove from My Saved Queries |
| | | {"accountNumber":["contains","0"]} | | 2020-01-05 05:24:17 EST | Add to My Saved Queries |

# Allied Central Dashboard: The Search Tab

## The Record Details Sub Tab

**Files**, **Jobs**, and **Job Details Sub Tabs** have the same search fields while the **Record Details Sub Tab** can be configured to show different search fields and columns based on **Company**, **Parent Product** or **Child Product**. (See screen capture below.)

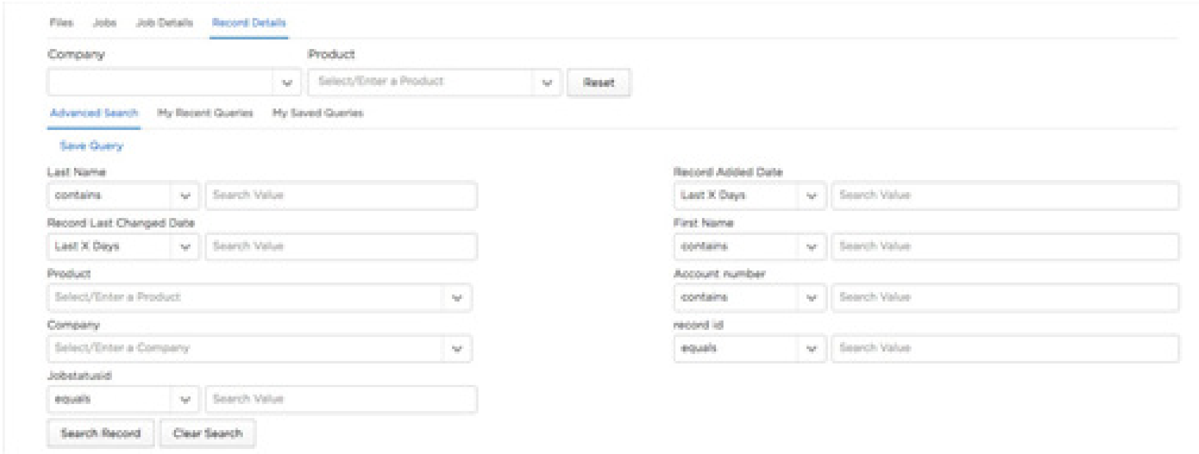
## Save as New Tab Button

Click the **Save as New Tab** button, to create and save the latest search results as a new Tab.

## Setting up the Search Sub Tabs

1. Navigate to the **Admin View** > **Role Administration Tab**
2. Filter the **Role** of the **User** you are currently using
3. Click **View/Edit** button
4. In the **Edit Role** pop up page, **Search** tasks are assigned (i.e.: **Files Search**, **Job Search**, **Job Option Search** and **Record Details Search**)
5. Click **Save** button

6. Logout and re-login using the same **User**
7. Navigate to the **Search Tab** and verify the assigned **Search** task is displayed properly.



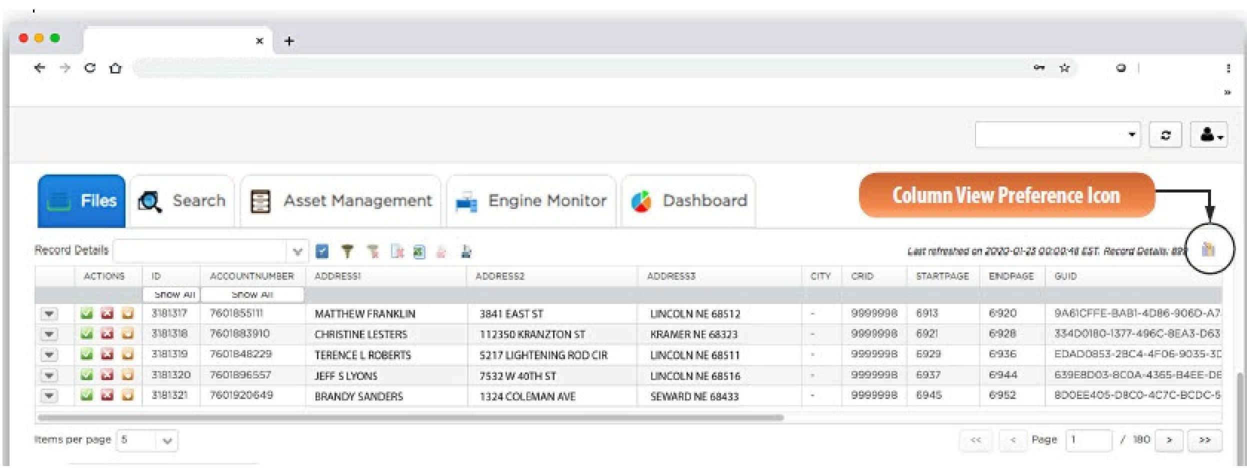

## Allied Central Dashboard: How-To Adjust the Column View Preferences

### Allied Central Dashboard Data Layers

Data Layers are designed to simplify the complexity of the underlying data source and allow information to be understood clearly. The Data Layer refers to the column view preferences to adjust the information displayed on the Dashboard for each Portlet. The changes can be made for Company and Product Data Layer as well as the Data Layer icon on Portlets.

### Steps to Modify Field Names and Column Placement

1. Select the Column View Preference Icon for the Data Layer
2. Configure and change labels according to preference
3. Click the Save button and exit the screen; changes are immediate

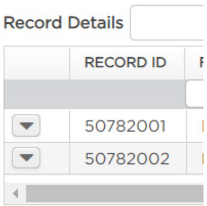



### File Archive

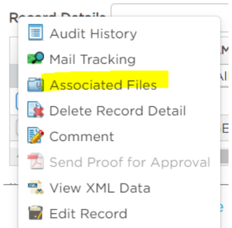
The Dashboard can store one or many files associated with each job and each record. For example, the originally processed file can be stored in the Files Portlet and PDFs of each document generated can be stored for each record in the Record Details Portlet.

To access those files:

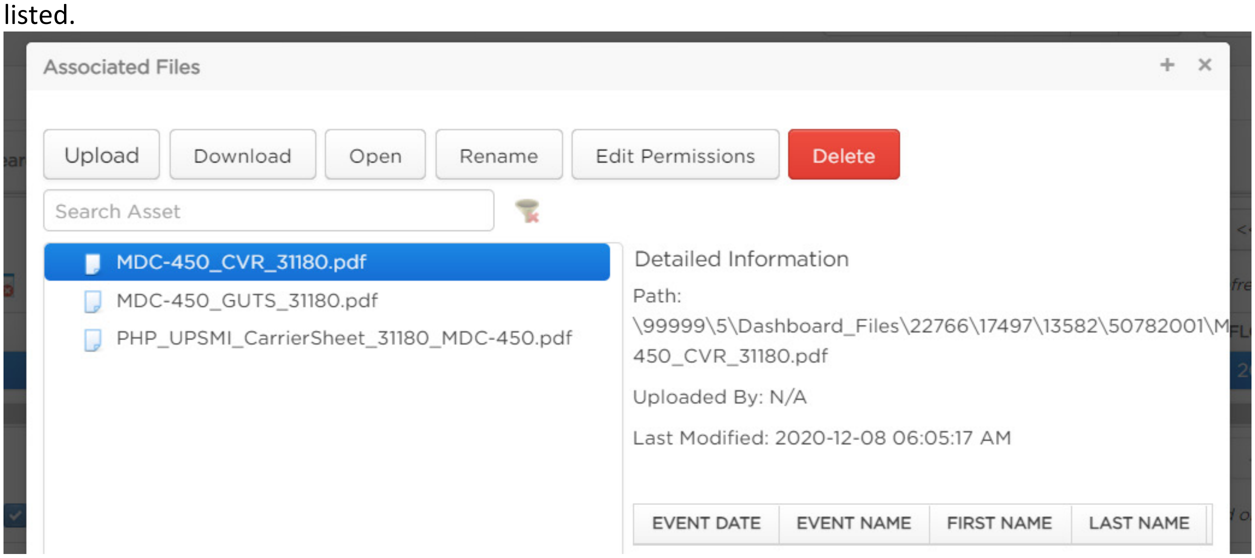
1. Click the down arrow in the far left column of the Record Details Portlet




2. Select the Associated Files option from the drop down list




3. Depending on the application, files of different types can be stored at each Portlet level. In this example, complete documents including book Covers and Guts as well as the address page are listed.

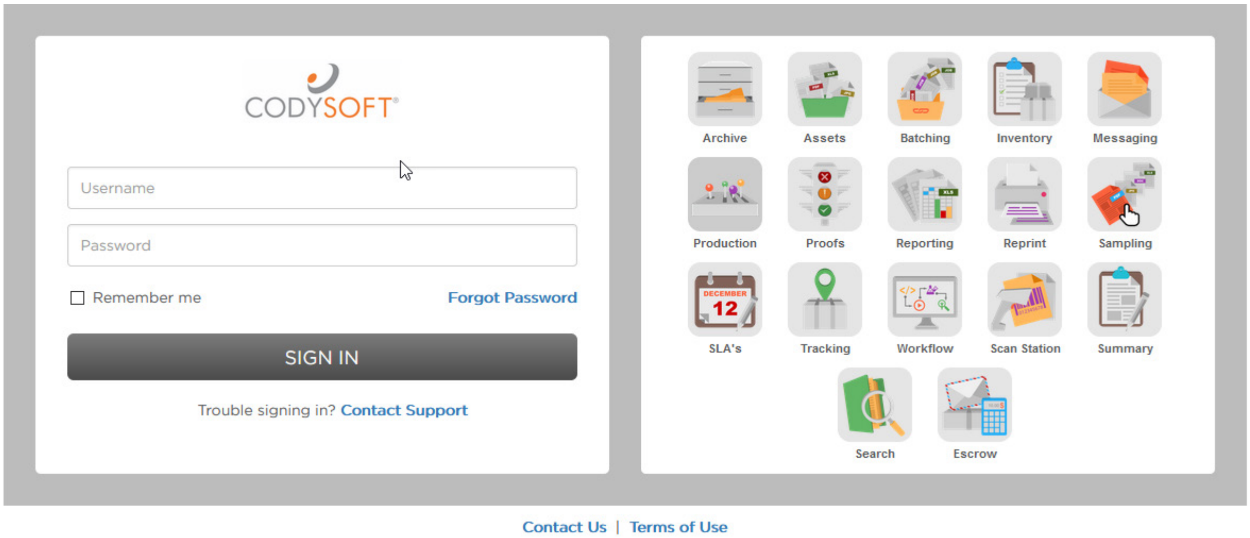



Some file types can be opened directly, like text files. Other files require another application to open them. You can download these files to view them.

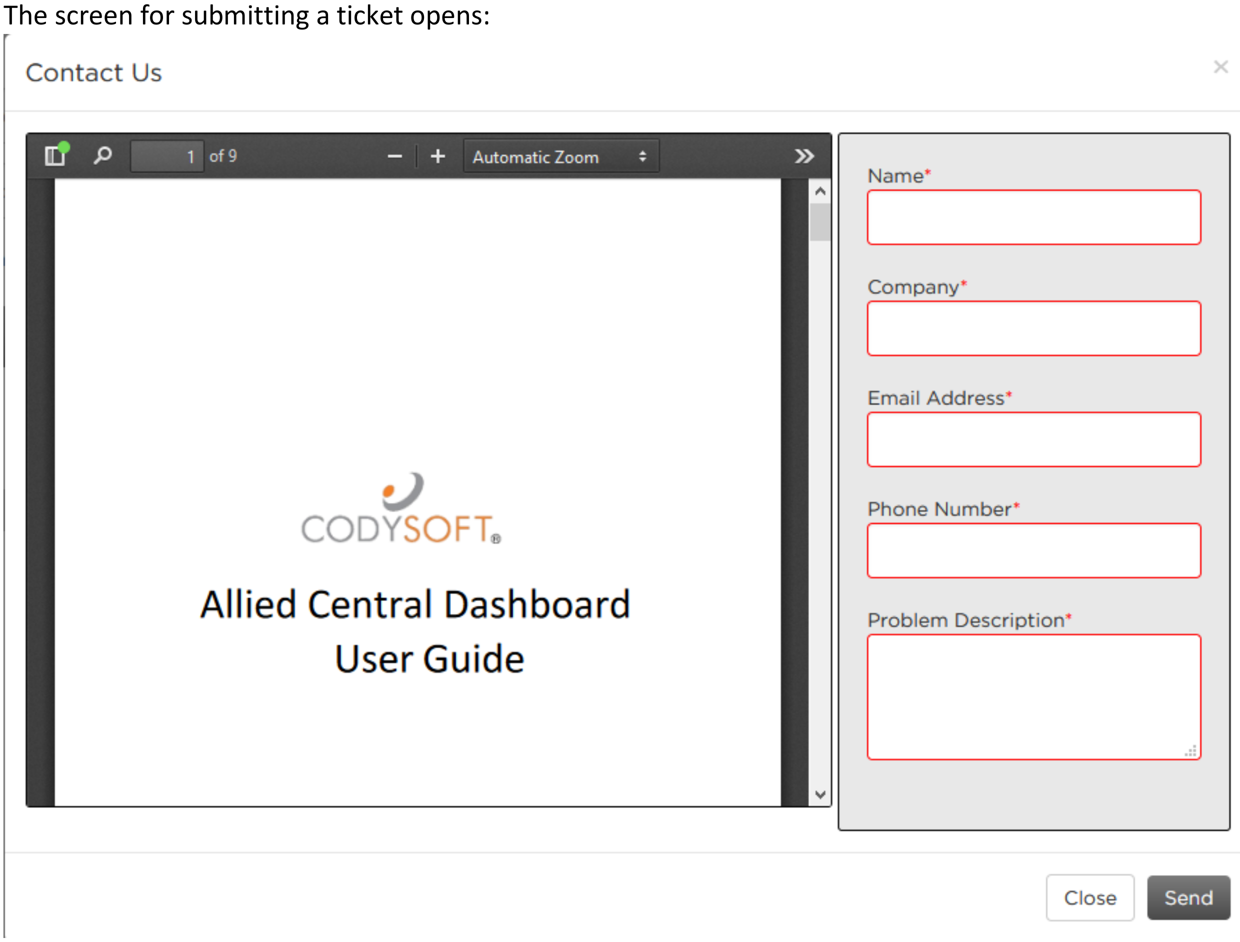
## Support

### Open a Ticket

1. From the main ACD screen click **Contact Support** to enter a new support ticket




The screen for submitting a ticket opens:




2. Enter your **Name**
3. Enter your **Company's Name**

4. Enter your **Email Address**
5. Enter your **Phone Number**
6. Enter a **Description** of the problem. Please provide as much detail as possible within the 500-character limit.
7. Click **Send.** An email is sent to the **Allied Central support team email box.** After you submit the email you will receive an email with a ticket number acknowledging receipt; please do not reply to this email. A member from the support team will contact you within the defined Service Level Agreement (SLA) between CODY and your organization.