

Leahy Consulting

PULSE 5 Webinar WEEK 1 Format – Features & Capabilities

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1. Administration

- a. PULSE 5 Install
 - SQL Server level install
 - Runs in Citrix environment
 - User can connect via Citrix or VPN
 - User can use SMART device
 - Software update/license update and Inventory Stored Procedure update via the internet
- b. Client executable / Direct executable for user desktops
- c. User Control
 - PULSE module (box by box) by user
 - GL account security by user
 - Salesperson security by user
 - PULSE users do not need to be Macola users
 - User groups
 - New users / domain linkage
 - Manual entry new user / domain linkage
 - Admin option by user
 - No PULSE administrator password needed for any administrative function
 - Review user security by logging in as different users
 - Administrator may update PULSE version and license on demand without interruption to other PULSE users
 - Individual user settings saved at database level

2. Launching & Viewing PULSE 5 connected to a Macola database

- a. Launch PULSE 5 by clicking desktop executable
- b. Help & Info
 - Live Help On-Line
 - Error messages received by PULSE 5 users sent to support automatically
 - e-mail address support@pulsedashboard.com
 - Web address <http://www.pulsedashboard.com/>
- c. Calendar
 - Options – calendar, fiscal, user defined, 13 month span



- Rolling concept for some graphics

3. Selective Refreshing

- a. Refresh all modules
- b. Refresh current module
- c. Refresh current tab
- d. Refresh current box
- e. Refresh selected boxes

4. Grids

- a. Quick Views using mouse-over
 - Column heading field descriptions
 - Customer number
 - Vendor number
- b. Quick Links using grid cell pop-up menu
 - Create, **Save & Share** a PULSE filter on the fly
 - Drillup - Create a custom tab by loading a Saved & Shared tab template for the specified data
 - Drilldown – Drill to other PULSE boxes
- c. One-click report writer (grid layout editor)
 - Field lookup and selection
 - **Save & Share** grid layout

5. Custom Tabs

- a. Create a tab template and **Save and Share**
- b. New tab
 - Create a blank tab
 - Copy & paste one or multiple boxes from any module (mix/match)
 - Add a new tab using the tab pop-up menu
 - Choose a tab template from the tab **Save & Share** dropdown
- c. Clone an existing tab
 - Delete un-needed boxes
 - Box selection and movement
- d. Make tab permanent

6. Filters

- a. Create or Edit filter
 - Field Selection
 - Filter Mode



- Include Selection
- Exclude Selection
- Include All (applies only to tabs)
- Value Selection
- b. Using Filters
 - Apply to Tab
 - Add Filter
 - a. Add new from scratch
 - b. Add new from **Save & Share** repository
 - Change Existing
 - a. Change via filter editor screen
 - b. Load a different filter from **Save & Share** repository
 - c. Temporarily disable filter
 - d. Select from filter values
 - Remove Filter
 - Apply to Box

7. Save & Share Repository

- a. Template repository concept
 - Tabs – boxes and filters attached
 - Boxes – settings, filters and grid layouts attached
 - Filters –for a tab or a box
 - Filing options
 - Folder naming conventions
 - New, overwrite existing and deleting existing
 - Sharing options
 - Just me
 - Everyone (Edit - allows overwrite/delete)