Damon Shratter

Damon is currently a Customer Care Analyst with extensive experience and skills in Training and Development. Damon works in Deltek’s Portland, OR office. As a Customer Care Analyst, he is responsible for Tier 2 escalations and client training on various Ajera topics. Prior to coming to Deltek, Damon has been a teacher at the Secondary and Post-Secondary levels as well as an instructor in the Army and a trainer in various corporate environments. Damon has a B.S. in Biology/Chemistry, a B.S. in Secondary Education and an M.A. in Secondary Science Education from the University of Alabama at Birmingham.
About the Instructor

James Stange

James has been consulting on the Ajera product since 2012. He has worked with hundreds of firms in the architecture and engineering industry. He has led dozens of implementations to Ajera as a trainer, project manager, and business consultant. James led a 2-day dashboard and widget class in 2014 for Ajera clients, and continues to design and develop widgets for clients today. He will be leading dashboard workshop for clients in select cities throughout 2017. James has a B.A. in Economics and an M.B.A. from Valparaiso University.

Goals of this session

- This interactive session and demonstration is designed to increase your comfort level working with Widgets and Dashboards.
- This will be driven by making use of Widget creation tools and Role - Configurable Dashboards.
- Topics covered include:
  - Adding or Removing Columns in Table and Chart widgets
  - Converting a Table widget to a Chart widget
  - Conditional Formatting
  - Linking and Creating Parent - Child Relationships
  - Getting the most relevant information from your data to your Dashboards
Ajera: Working with Widgets and Dashboards

Getting Started

Basic Terminology

Dashboard – A single Ajera web page that visually displays critical information that can be monitored at a glance.

Page – A group of tabs designed to display information either in aggregate or filtered for a specific record. The default page is the home page which is unfiltered.

Tab – Used to group similar content and help users navigate quickly to other dashboards

Widget – An interactive building block that uses Ajera reporting information to populate a dashboard

- Table widgets display information in a tabular column and row format.
- Chart widgets display information as bar, pie, line, scatter, column or area graphs.
Basic Terminology

Link - A link will direct you to the page that corresponds to the column that contains the link.

Parent/Child Relationship – Using the record in one widget to filter the records in another related widget. A parent child relationship is created by connecting the two widgets using a common key. The parent and child widgets must be on the same tab.

Ajera: Working with Widgets and Dashboards

Getting Started
General Process
General Process

Think of a Widget as a visually pleasing displayed Inquiry. Getting work done efficiently in Inquiry required informed processes.

Start with a prebuilt inquiry

Customize the information

Link to other inquiries

Distribute to staff
General Process

Getting work done efficiently in Inquiry required informed processes.

Customize the information

Link to other inquiries
General Process

Getting work done efficiently in Inquiry required informed processes.
General Process

Getting work done efficiently with Widgets also requires informed processes.

Just as knowing what Inquiry to start with leads to an easier time and more readily available information, knowing what “Base” to start with for your widget will improve results.

Ajera: Working with Widgets and Dashboards

Part I of session – Damon Shratter
What are we going to do?
Widgets and Dashboards Part I

Class Outline - Part I

Divide participants into workgroups:
  – Each group will:
    • Come up with one set of widgets (one chart and one table) for information you would like to see.
    And
    • Come up with two related widgets to show information you would like to see in Ajera (KPI’s, Client invoice Entries, Project Information, etc.)

Note: These could be changing existing widgets or from scratch

You will have about 30 minutes to come up with responses
Class Outline - Part I, cont.

- Share your responses:
  - After allotted time, each group will submit their responses
  - Compare responses for commonality and differences

Class Outline - Part I

- Let's review your ideas
- Your participation is encouraged!
Ajera: Working with Widgets and Dashboards

Class Outline
Part II of session – James Stange
What are we going to do?

Widgets and Dashboards Part II
Class Outline - Part II

Divide participants into workgroups:
- Each group will:
  - Come up with widgets of information you would like to see.
  - Try using advanced features like parent child relationships, percentage column and group subtotals, filters on subtotals, top 10 lists, links for drilling down, as of dates and more

Note: These could be changing existing widgets or from scratch

You will have about 30 minutes to come up with responses

Class Outline - Part II, cont.

- Share your responses:
  - After allotted time, each group will submit their responses
  - Compare responses for commonality and differences
Class Outline - Part II, cont.

- Let’s review your ideas
- Your participation is encouraged!

Ajera: Working with Widgets and Dashboards

Questions?