Dashboard Module

User Manual - Console Interface

SONARWORKS WORKFLOW SYSTEM

Version 1.0

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1. Introduction

The Dashboard is the central hub of the Sonarworks Workflow System. After logging in, users are immediately directed to the Dashboard, which provides a comprehensive overview of their workflow activities, pending tasks, and quick access to frequently used features.

Purpose of the Dashboard:

- Provide at-a-glance view of important information
- Display pending approvals and tasks requiring attention
- Show recent workflow submissions and their status
- Enable quick access to commonly used workflows
- Present key metrics and statistics

[Screenshot: Dashboard Main View]

Figure: Dashboard Main View

2. Dashboard Overview

2.1 Dashboard Layout

The Dashboard is organized into distinct sections, each providing specific information and functionality:

Section	Location	Purpose
Header Bar	Top	User profile, notifications, theme toggle, logout
Navigation Sidebar	Left	Access to all system modules
Quick Stats	Top Center	Key metrics at a glance
Pending Approvals	Center	Workflows awaiting your approval
Recent Submissions	Center	Your recent workflow submissions
Quick Actions	Right/Bottom	Shortcuts to common tasks

[Screenshot: Dashboard Layout Diagram]

Figure: Dashboard Layout Diagram

2.2 Role-Based Content

The Dashboard content adapts based on your user role:

User Role	Dashboard Features
Administrator	All metrics, system statistics, user activity summary
Approver	Pending approvals count, approval queue, escalated items
Initiator	My submissions, draft workflows, available workflows

Manager	Team metrics, departmental statistics, reports access

3. Dashboard Components

3.1 Header Bar

The Header Bar is always visible at the top of the screen and contains:

Component	Icon/Location	Function
Logo	Left	Click to return to Dashboard from any page
Search	Center	Quick search across workflows and instances
Notifications	Right	Bell icon shows pending notifications count
Theme Toggle	Right	Switch between light and dark mode
User Profile	Right	Access profile, change password, logout

[Screenshot: Header Bar Components]

Figure: Header Bar Components

3.2 Navigation Sidebar

The Navigation Sidebar provides access to all system modules. It can be collapsed to maximize screen space.

Main Navigation Items:

- Dashboard - Return to main dashboard
- Workflows - Browse and submit workflows
- My Submissions - View your submitted workflows
- Approvals - View pending approvals (Approvers only)
- Administration - User, role, organization management (Admins)
- Reports - Access system reports
- Settings - System configuration (Admins)

3.3 Sidebar Operations

Action	How To	Result
Expand Sidebar	Click hamburger menu icon	Full sidebar with labels
Collapse Sidebar	Click hamburger menu icon again	Icons only (more space)
Navigate	Click any menu item	Opens the selected module
Sub-menu	Click arrow on menu item	Expands sub-navigation items

4. Quick Stats Panel

The Quick Stats Panel displays key metrics in card format, providing immediate insight into your workflow status.

4.1 Available Statistics

Stat Card	Shows	Visibility
Pending Approvals	Number of workflows awaiting your approval	Approvers, Managers
My Submissions	Total workflows you have submitted	All users
Drafts	Incomplete workflow submissions saved as draft	All users
Approved Today	Workflows approved in the last 24 hours	Approvers, Managers
Rejected Today	Workflows rejected in the last 24 hours	Approvers, Managers
Escalated	Workflows that have been escalated	Managers, Admins
Active Workflows	Total active workflow templates	Admins

[Screenshot: Quick Stats Cards]

Figure: Quick Stats Cards

4.2 Stat Card Interactions

Each stat card is interactive:

- Click on a card to navigate to the detailed view
- Hover to see a tooltip with additional information
- Cards update in real-time as workflow status changes
- Color indicators show status (green=good, yellow=attention, red=urgent)

Example: Clicking Pending Approvals Card

User clicks the "Pending Approvals: 5" card

System navigates to Approvals list

List is pre-filtered to show only pending items

User can immediately start processing approvals

5. Recent Activity

5.1 Recent Submissions

Displays your most recent workflow submissions with current status:

Column	Description
Reference No.	Unique identifier for the submission
Workflow	Name of the workflow
Status	Current status (Pending, Approved, Rejected, etc.)
Submitted	Date and time of submission
Current Approver	Person currently reviewing (if pending)

5.2 Status Indicators

Status	Color	Meaning
Draft	Gray	Not yet submitted, saved for later
Pending	Yellow/Orange	Awaiting approval
Approved	Green	Fully approved
Rejected	Red	Rejected by an approver
Escalated	Purple	Escalated to higher authority
Cancelled	Gray	Cancelled by initiator
On Hold	Blue	Temporarily paused
Recalled	Orange	Recalled by initiator for changes

[Screenshot: Recent Submissions Panel]

Figure: Recent Submissions Panel

5.3 Viewing Submission Details

Steps:

Step 1: Locate the submission in the Recent Submissions panel

Step 2: Click on the row or the 'View' action button

Step 3: The Submission Detail page opens showing full information

Step 4: Review the submission data, approval history, and attachments

6. Quick Actions

Quick Actions provide shortcuts to frequently used features, reducing the number of clicks needed to perform common tasks.

6.1 Available Quick Actions

Action	Description	Where It Goes
New Workflow	Start a new workflow submission	Workflow selection page
View Approvals	See pending approval items	Approvals list
My Submissions	Track your submissions	My Submissions page
View Reports	Access reporting module	Reports list
Manage Users	User administration (Admin)	User management

6.2 Using Quick Actions

Steps:

Step 1: Locate the Quick Actions section on the Dashboard

Step 2: Click the desired action button

Step 3: You are immediately taken to that feature

Step 4: Complete your task in the new screen

[Screenshot: Quick Actions Buttons]

Figure: Quick Actions Buttons

7. Navigation Elements

7.1 Breadcrumb Navigation

Breadcrumbs appear at the top of each page showing your current location in the system hierarchy:

Example: Breadcrumb Path

Dashboard > Workflows > Purchase Request > View Instance

Each segment is clickable to navigate back to that level

7.2 Back Navigation

- Use browser back button to return to previous page
- Click breadcrumb links to jump to specific levels
- Dashboard logo always returns to main Dashboard
- Cancel buttons on forms return to previous list view

7.3 Keyboard Shortcuts

Shortcut	Action

Alt + D	Go to Dashboard
Alt + W	Go to Workflows
Alt + A	Go to Approvals
Alt + S	Focus Search box
Escape	Close dialogs/modals

8. Personalization

8.1 Theme Selection

The system supports light and dark themes for user comfort:

Steps:

Step 1: Click the theme toggle icon in the Header Bar (sun/moon icon)

Step 2: The interface immediately switches to the alternate theme

Step 3: Your preference is saved and persists across sessions

Theme	Best For	Description
Light Mode	Well-lit environments	White background, dark text
Dark Mode	Low-light environments	Dark background, light text

8.2 Dashboard Layout Preferences

Some dashboard elements can be customized:

- Sidebar can be collapsed for more workspace
- Stat cards may be reordered (if enabled by admin)
- Table views remember sort and filter preferences
- Recent items count can be configured in Settings

9. Best Practices

9.1 Daily Workflow

Recommended daily routine for effective workflow management:

1. Check the Dashboard immediately after logging in
2. Review the Pending Approvals count and process urgent items
3. Check My Submissions for any status updates
4. Review any notifications for important alerts

5. Use Quick Actions to efficiently navigate to needed features

9.2 Tips for Efficiency

- Keep the sidebar collapsed when working on detailed forms
- Use keyboard shortcuts for faster navigation
- Set up browser bookmarks for frequently accessed pages
- Check notifications regularly for time-sensitive approvals
- Use the search feature to quickly find specific workflows

9.3 Understanding Notifications

Notification Type	Indicates	Action Required
New Approval	Workflow assigned for your approval	Review and approve/reject
Submission Update	Status change on your submission	Check new status
Escalation	Workflow escalated to you	Immediate attention needed
Reminder	Pending item overdue	Process the pending item
System	System maintenance or updates	Note the information

TIP: Regular dashboard checks ensure you don't miss important approvals or updates to your submissions.