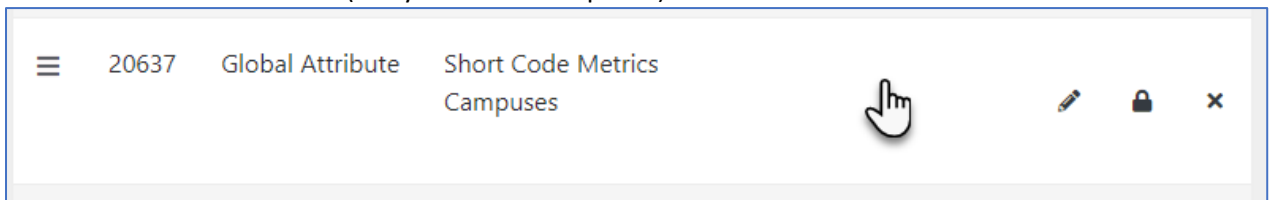


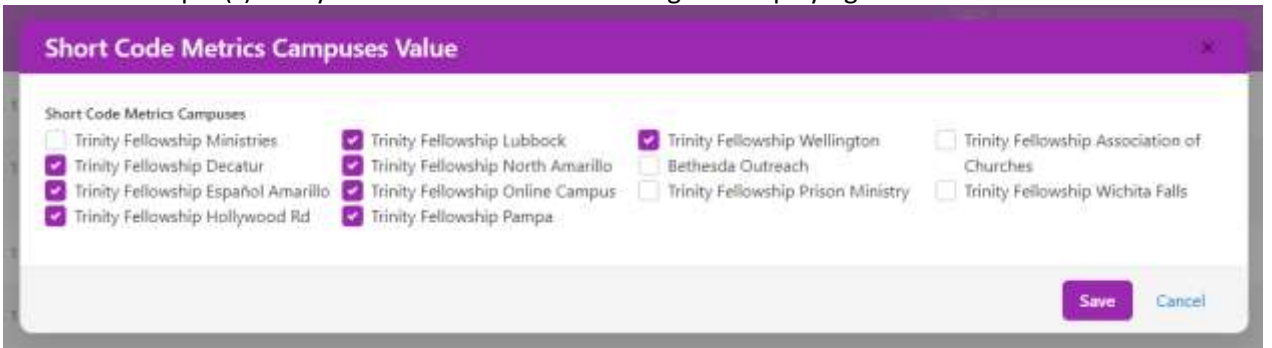
Metrics History & Maintenance via Lava Shortcode(s)- INSTRUCTIONS

By Trinity Fellowship, Amarillo, TX

1. Unzip the “Dashboards w/ Shortcodes” folder.
2. Database access with rights to create a table.
 - a. Copy & Paste the “CREATE TABLE..” text from the “**02_SQL_com_trinityfellowship_MetricsTemp.txt**” file.
 - i. If you have Rock Administrative access you can use the Rock SQL Command Screen located at “**Admin Tools > Power Tools > SQL Command**”
 - ii. Or one of the many SQL database administrative tools such as:
 1. Azure Data Studio
 2. SQL Server Management Studio
 3. Etc.
3. GO TO “**Admin Tools > Global Attributes**” to create one new global attribute.
 - a. Name: **Short Code Metrics Campuses**
 - b. Field Type: **Campuses**
 - c. SAVE – without setting defaults.
 - d. Click on the Global Attribute (away from the edit pencil).



- e.
- f. Select the Campus(s) that you want to include in creating and displaying metrics.



- g.
- h. SAVE

4. GO TO “*System Settings > Entity Attributes*” to create two Campus attributes & one Metric Attribute.
- Select “Entity Type” > Campus
 - First Campus Entity Attribute
 - Name: **Campus Color**
 - Field Type: **Color**
 - Selection Type: **Color Picker**
 - SAVE

Edit Campus Color Id: 22304

Entity Type

Campus

Qualifier Field

Qualifier Value

Name

Campus Color

Active

☒

Abbreviated Name

Campus Color

Public

☐

Description

Campus default color for use in display on pages / dashboards / etc.

Categories

Field Type

Color

Key

CampusColor

Selection Type

Color Picker

Required

☐ Require a value

Show in Grid

☐ Yes

Default Value

Show on Bulk

☐ Yes

Advanced Settings

Save

Cancel

C.

d. Second Campus Entity Attribute

- i. Name: **Campus Icon**
- ii. Field Type: **Text**
- iii. SAVE

Edit Campus IconId: 22305

Entity Type

Campus

Qualifier Field

Qualifier Value

Name

Campus Icon

Active

☒

Abbreviated Name

Campus Icon

Public

☐

Description

Used to display the regular organizational church icon in pages / reports / dashboards / etc.

Categories

Field Type

Text

Key

CampusIcon

Password Field

☐ Yes

Required

☐ Require a value

Show in Grid

☐ Yes

Max Characters

Show on Bulk

☐ Yes

Show Character Limit Countdown

☐ Yes

Default Value

Advanced Settings

Save

Cancel

e.

- g. Select "Entity Type" > Metric
- h. Metric Entity Attribute
 - i. Name: **Display KPIs & Charts as Cumulative or Average**
 - ii. Abbreviated Name: **Cumulative or Average**
 - iii. *** IMPORTANT *** Key: **CumulativeorAverage**
 - iv. Field Type: **Boolean**
 - v. True Text: **Average**
 - vi. False Text: **Cumulative**
 - vii. Control Type: **Toggle**
 - viii. SAVE

Edit Display KPIs & Charts as Cumulative or Average Id: 25157

Entity Type

Metric

Qualifier Field

Qualifier Value

Name

Display KPIs & Charts as Cumulative or Average

Active

☒

Abbreviated Name

Cumulative or Average

Public

☐

Description

Categories

Field Type

Boolean

Key

CumulativeorAverage

True Text

Average

Required

☐ Require a value

Show in Grid

☒ Yes

False Text

Cumulative

Show on Bulk

☐ Yes

Control Type

Toggle

Default Value

Cumulative

Average

Advanced Settings

Save

Cancel

i.

5. GO TO “*Admin Tools > General > Campuses*” to set the new attributes on each campus.
 - a. Select a Campus
 - b. EDIT
 - c. Scroll down to set the “Campus Color” attribute
 - i. You can use the picker, set a color via rgb(xx,xx,xx), set a color via hex #XXXXXX.
 - d. Continue down to set the “Campus Icon” attribute
 - i. You can use the default church icon by entering **fa fa-church**
 - e. SAVE

Campus Detail

First Baptist Church North Atlanta

Name: First Baptist Church North Atlanta

Address: [Empty]

Website: [Empty]

Phone: [Empty]

Email: [Empty]

Social Media: [Empty]

Campus Color: #000000

Campus Icon: fa fa-church

Save Cancel

f.

7. GO TO “**Admin Tools > CMS Configuration > Lava Shortcodes**” to create Inline Lava Shortcode(s)
 - a. “+” to create a new lava Shortcode
 - b. Name: **Metrics Clean Up**
 - c. Tag Name: **metricscleanup**
 - d. Tag Type: **Inline**
 - e. Description: **{{ metricscleanup thekey:'xx' }}**
 - f. Documentation: ***This is used for cleanup of the [dbo].[com_trinityfellowship_MetricsTemp] table after a metric is created. It will automatically pass the key to be used f.***
 - g. Shortcode Markup - Copy & Paste the text from the “04_metricscleanup_shortcode.txt” file.
 - h. Parameters:
 - i. Key: **thekey** – Value: **No**
 - i. Enable Lava Commands: **Checkbox – SQL**
 - j. **SAVE**

Lava Shortcode Detail
Home > CMS Configuration > Lava Shortcodes > Lava Shortcode Detail

Edit Lava Shortcode

Name * Metrics Clean Up Active ☒

Tag Name * metricscleanup Tag Type ☒ Inline ☐ Block

Categories

Description
{{ metricscleanup thekey:'xx' }}

Documentation
This is used for cleanup of the [dbo].[com_trinityfellowship_MetricsTemp] table after a metric is created. It will automatically pass the key to be used.

Shortcode Markup *

```

1  {% comment %}
2      Date: 2023-02-07
3      Purpose: Shortcode that will delete metric data based on the key that was used to create a set. Try... Cleanup on table [dbo].[com_trinityfellowship_MetricsTemp] !
4      Created by: Trinity Fellowship Church, 5200 Hollywood Rd, Azarillo, TX 79118
5  {% endcomment %}
6  {% if thekey != 'No' %}
7      {% sql %}
8          DECLARE @keykey AS NVARCHAR(255) = '{{ thekey }}' + 'x';
9          Delete FROM [dbo].[com_trinityfellowship_MetricsTemp] OUTPUT DELETED.ID WHERE [Thekey] LIKE @keykey;
10     {% endsql %}
11  {% endif %}

```

Parameters
 thekey No x

Enabled Lava Commands:

<input type="checkbox"/> All	<input type="checkbox"/> Interaction Content Channel	<input checked="" type="checkbox"/> Sql
<input type="checkbox"/> Cache	<input type="checkbox"/> Item Write	<input type="checkbox"/> Web Request
<input type="checkbox"/> Calendar Events	<input type="checkbox"/> Interaction Write	<input type="checkbox"/> Workflow Activate
<input type="checkbox"/> Event Scheduled Instance	<input type="checkbox"/> Rock Entity	
<input type="checkbox"/> Execute	<input type="checkbox"/> Search	

Save Cancel

k.

8. GO TO “**Admin Tools > CMS Configuration > Lava Shortcodes**” to create Inline Lava Shortcode(s)
 - a. “+” to create a new lava Shortcode
 - b. Name: **Metrics Person Date Attribute**
 - c. Tag Name: **metricspersondateattribute**
 - d. Tag Type: **Inline**
 - e. Description: **{[metricspersondateattribute pakey:'xx' weeksback:'xx']}**
 - f. Documentation: **The {[metricspersondateattribute pakey:'xx' weeksback:'xx']} is used to create **Person Date Attribute** metrics history and maintain the metrics data going forward. This uses a **Person Attribute Key (pakey)** and **Weeks Back (weeksback)** to build and maintain your metric data.**
 - g. Shortcode Markup - Copy & Paste the text from the “05_metricspersondateattribute_shortcode.txt” file.
 - h. Parameters:
 - i. Key: **pakey** – Value: **No** – Input: **Integer**
 - ii. Key: **weeksback** – Value: **No** – Input: **Integer**
 - i. Enable Lava Commands: **Checkbox – Rock Entity & Checkbox – SQL**
 - j. SAVE

Lava Shortcode Detail
Home > CMS Configuration > Lava Shortcodes > Lava Shortcode Detail

Edit Lava Shortcode

Name *
Metrics Person Date Attribute

Tag Name *
metricspersondateattribute

Categories
[icon]

Description
{[metricspersondateattribute pakey:'xx' weeksback:'xx']}

Documentation

Shortcode Markup *

```

1 [% comment %]
2 Date: 2023-03-07
3 Purpose: Shortcode that will create metrics data for a Person Attribute by specific Date and record the counted or totaled amount then write a weekly Sunday number/metric by Campus partition.
4 This code will go backward in time based on the variable WEEKSBACK and update the metric.
5 Created by: Trinity Fellowship Church, 5000 Hollywood Rd. Amarillo, TX 79118
6 [% endcomment %]
7 [% if pakey == 'No' or weeksback == 'No' %]
8 [% else %]
9 [% if weeksback >= 0 %]{% assign weeksback = 1 %}{% endif %}
10 [% assign thisweekenday = 'Now' | SundayDate | Date:'MM/dd/yyyy' %]
11 [% assign camps = 'Global' | Attribute:'ShortCodeMetricsCampuses','RawValue' | Split:', ' %]
12 [% assign campact = camps | Size %]
13 [% assign thekey1 = 'Persons' | Append:pakey | Append:'>' %]
14
15 [% if campact and campact >= 0 %]
16
17 [% for thiscampus in camps %]
18
19 [% campus where:'Date' == '{% thiscampus %}' | securityenabled:'false' %]
20 [% assign iweekid = campus.Id %]
21 [% assign thekey = thekey1 | Append:iweekid | Append:'>' %]
22
23

```

Parameters

pakey No X

weeksback No X

Enabled Lava Commands

☐ All
☐ Cache
☐ Calendar Events
☐ Event Scheduled Instance
☐ Execute
☐ Interaction Content Channel
☐ Item Write
☐ Interaction Write
☒ Rock Entity
☐ Search
☒ Sql
☐ Web Request
☐ Workflow Activate

Save Cancel

k.

9. GO TO “**Admin Tools > CMS Configuration > Lava Shortcodes**” to create Inline Lava Shortcode(s)
 - a. “+” to create a new lava Shortcode
 - b. Name: **Metrics Steps Date Property**
 - c. Tag Name: **metricsstepsdateproperty**
 - d. Tag Type: **Inline**
 - e. Description: **{{ metricsstepsdateproperty stypeid:'xx' startcomplete:'xx' weeksback:'xx' }}**
 - f. Documentation: **The {{ metricsstepsdateproperty stypeid:'xx' startcomplete:'xx' weeksback:'xx' }} is used to create **Steps – Start Date or Completed Date** metrics history and maintain the metrics data going forward. This uses a Step Type Id (stypeid), Start or Completed Date (startcomplete) and Weeks Back (weeksback) to build and maintain your metric data.**
 - g. Shortcode Markup - Copy & Paste the text from the “06_metricsstepsdateproperty_shortcode.txt” file.
 - h. Parameters:
 - i. Key: **stypeid** – Value: **No** – Input: **Integer**
 - ii. Key: **startcompleted** – Value: **No** – Input: **“start” or “complete” ... no quotes!**
 - iii. Key: **weeksback** – Value: **No** – Input: **Integer**
 - i. Enable Lava Commands: **Checkbox – Rock Entity & Checkbox – SQL**
 - j. SAVE

Lava Shortcode Detail

Home > CMS Configuration > Lava Shortcodes > Lava Shortcode Detail

Edit Lava Shortcode

Name *

Metrics Steps Date Property

Active

☒

Tag Name *

metricsstepsdateproperty

Tag Type *

☒ Inline ☐ Block

Categories

Description

{{ metricsstepsdateproperty stypeid:'xx' startcomplete:'xx' weeksback:'xx' }}

Documentation

Shortcode Markup *

```

1  {% comment %}
2  Date: 2023-02-07
3  Purpose: Shortcode that will create metrics data for a Steps. The SQL will use the specified Date and record the counted or totaled amount then write a weekly Sunday's Date - [Count] / [CampusId] / [ThisWeeksSunday] /
4  [Today] (used for cleanup) all by Campus partition.
5  This code will go backward in time based on the variable WEEKSBACK and update the metrics.
6  Created by: Trinity Fellowship Church, 5000 Hollywood Rd. Amarillo, TX 79118
7  {% endcomment %}
8  {% if stypeid == 'No' or startcomplete == 'No' or weeksback == 'No' %}
9  {% else %}
10     {% if weeksback <= 0 %}{% assign weeksback = 1 %}{% endif %}
11     {% assign thisWeeksSunday = 'Now' | SundayDate | Date:'MM/dd/yyyy' %}
12     {% assign camps = 'Global' | Attribute:'ShortCodeMetricsCampuses','RawValue' | Split:';' %}
13     {% assign compact = camps | Size %}
14     {% assign thekey = 'Steps' | Append:stypeid | Append:'-' | Append:startcomplete | Append:'-' %}
15     {% assign asc = startcomplete | Downcase %}
16
17     {% if compact and compact >= 0 %}
18         {% for thiscampus in camps %}
19             {% campus where:'CampusId' == '{{ thiscampus }}' | securityenabled:'false' %}
20             {% assign:ascend = asc asc %}

```

Parameters

stypeid

No

×

startcomplete

No

×

weeksback

No

×

Enabled Lava Commands

☐ All

☐ Cache

☐ Calendar Events

☐ Event Scheduled Instance

☐ Execute

☐ Interaction Content Channel

☐ Item Write

☐ Interaction Write

☒ Rock Entity

☐ Search

☒ Sql

☐ Web Request

☐ Workflow Activate

Save

Cancel

k.

10. GO TO “**Admin Tools > CMS Configuration > Lava Shortcodes**” to create Inline Lava Shortcode(s)
 - a. “+” to create a new lava Shortcode
 - b. Name: **Metrics Connection Requests Weekly by Opportunity**
 - c. Tag Name: metricscrweeklybyoppid
 - d. Tag Type: **Inline**
 - e. Description: **{[metricscrweeklybyoppid optypeid:'xx' weeksback:'xx']}**
 - f. Documentation: ***The {[metricscrweeklybyoppid optypeid:'xx' weeksback:'xx']} is used to create Connection Request (count) metrics history and maintain the metrics data going forward. This uses a Connection Request Opportunity Id (optypeid) and Weeks Back (weeksback) to build and maintain your metric data.***
 - g. Shortcode Markup - Copy & Paste the text from the “06_metricsstepsdateproperty_shortcode.txt” file.
 - h. Parameters:
 - i. Key: **optypeid** – Value: **No** – Input: **Integer**
 - ii. Key: **weeksback** – Value: **No** – Input: **Integer**
 - i. Enable Lava Commands: **Checkbox – Rock Entity & Checkbox – SQL**
 - j. **SAVE**

Lava Shortcode Detail
Home > CMS Configuration > Lava Shortcodes > Lava Shortcode Detail

Edit Lava Shortcode

Name *
Metrics Connection Requests Weekly by Opportunity

Active ☒

Tag Name *
metricscrweeklybyoppid

Tag Type *
☒ Inline ☐ Block

Categories
-

Description
{[metricscrweeklybyoppid optypeid:'xx' weeksback:'xx']}

Documentation

Shortcode Markup *

```

1 [% comment %]
2 Date: 2023-02-27
3 Purpose: Shortcode that will create metrics data for a New Ch / leads per WEEK based on MONDAY to SUNDAY of the week regardless of the month/year, by Campus partition.
4 This code will go backward in time based on the variable MONTH/DAY and update the metric..
5 Created by: Trinity Fellowship Church, 3660 Hollywood Rd. Amarillo, TX 79118
6 [% endcomment %]
7 [% if weeksback == "No" or optypeid == "No" %]
8 [% else %]
9 [% if weeksback >= 0 %]{[% assign weeksback = 1 %]}[% endif %]
10 [% assign thisweekssunday = "Now" | SundayDate | Date: "MM/dd/yyyy" %]
11 [% assign camps = "Global" | Attributes: "ShortcodeMetricCampuses", "RawValue" | Spills: " " %]
12 [% assign campst = camps | Size %]
13 [% assign thekey1 = "ChrOpWeeksCTs" %]
14 [% connectionsopportunity where: "Active == 'true'" && "Id == {[ optypeid ]}" securityenabled: "false" %]
15 [% assign total = connectionsopportunitySum %]
16 [% endconnectionsopportunity %]
17
18 [% if campst and campst >= 0 %]
19 [% for thiscampus in camps %]
20
21 [% endfor %]
22 [% assign where: "Date == {[ thisweekssunday ]}" securityenabled: "false" %]

```

Parameters
 optypeid No X
 weeksback No X

Enabled Lava Commands
☐ All ☐ Interaction Content Channel ☒ Sql
☐ Cache ☐ Item Write ☐ Web Request
☐ Calendar Events ☐ Interaction Write ☐ Workflow Activate
☐ Event Scheduled Instance ☒ Rock Entity
☐ Execute ☐ Search

Save Cancel

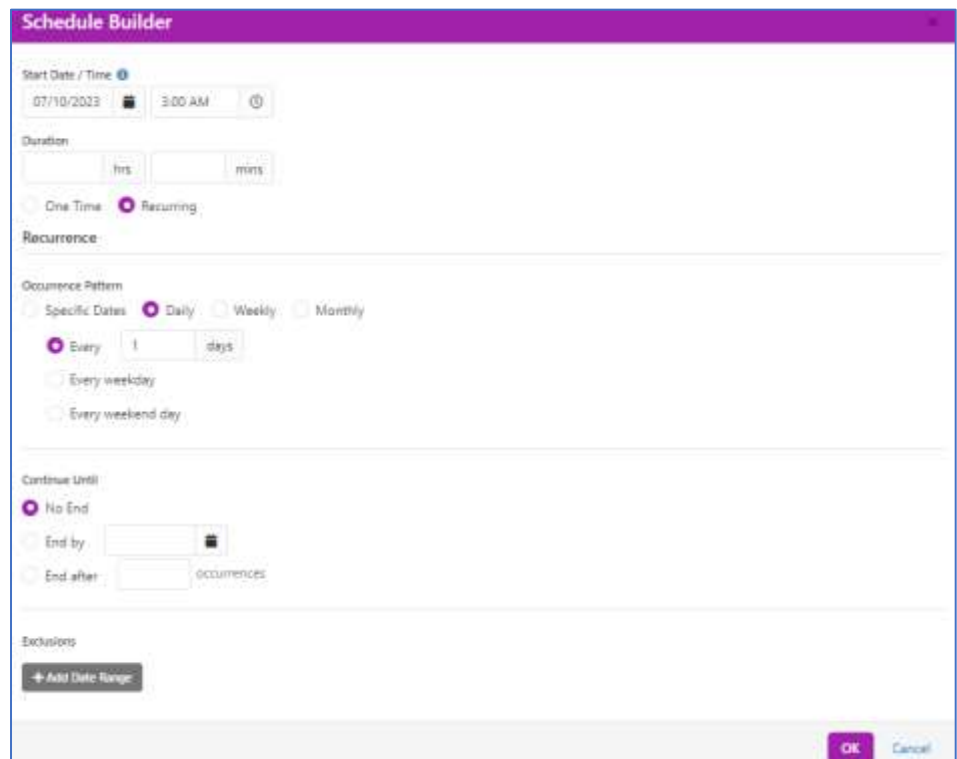
k.

Hang in there, we're going to use these codes now to build some metric data!

This next set of instructions will show you where to setup metric schedule(s), gather the required information to feed the lava shortcodes for (1) Person Date Attribute Key, (2) Step Type Id number (3) Connection Request Opportunity Id number, and finally ... yes we will create a metric to record the data.

11. Metrics Schedules

- a. GO TO "**Admin Tools > General Settings > Person Schedules**"
 - i. Click on the "Metrics" Category
 - ii. "+" to add a new schedule
 1. Name: **Daily @ 3am**
 2. Active: **Checked**
 3. Abbreviated Name: **Daily @ 3am**
 4. Category: **Metrics**
 5. Click "Edit Schedule"
 - a. Start Date / Time
 - i. Enter the current date or click "Today" button
 - ii. Enter 3:00 AM
 - b. Duration
 - i. Skip "hrs" & "mins"
 - ii. Click radio button for "Recurring"
 - iii. Occurrence Pattern
 1. Click radio button for "Daily"
 2. Leave it set for "Every 1 days"
 - iv. Continue Until
 1. Leave it set for "No End"
6. Click OK to SAVE

The screenshot shows the 'Schedule Builder' window. At the top, the title is 'Schedule Builder'. Below it, the 'Start Date / Time' section shows '07/10/2023' and '3:00 AM'. The 'Duration' section has input fields for 'hrs' and 'mins'. The 'Recurrence' section has two radio buttons: 'One Time' and 'Recurring', with 'Recurring' selected. Below this, the 'Occurrence Pattern' section has three radio buttons: 'Specific Dates', 'Daily', and 'Weekly', with 'Daily' selected. Under 'Daily', there is a sub-section with 'Every' selected, a value of '1' in a text box, and the word 'days'. Other options like 'Every weekday' and 'Every weekend day' are unselected. The 'Continue Until' section has three radio buttons: 'No End', 'End by', and 'End after', with 'No End' selected. At the bottom, there is an 'Exclusions' section with a button labeled '+ Add Date Range'. The bottom right corner has 'OK' and 'Cancel' buttons.

7.
 - iii. SAVE

12. Person Date Attribute Id(s)

- a. GO TO “*Admin Tools > General Settings > Person Attributes*”
 - i. Locate the date attribute(s) you want to use for the new metric(s) and write down the Id number. For this example, we will use the “Salvation Date” attribute Id #4587.

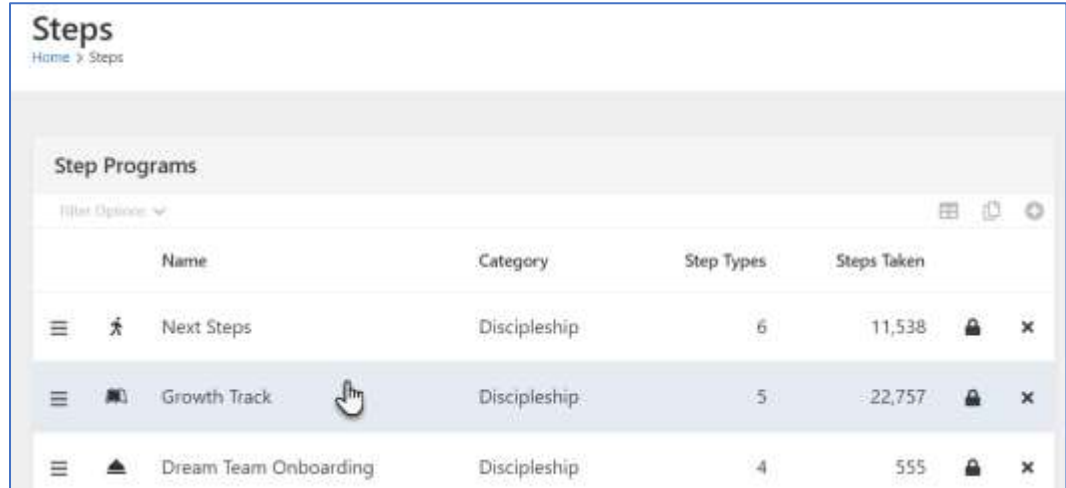


Id	Qualifier	Name	Categories	Default Value
4587	Person	Salvation Date		

- ii.
- iii. Continue for any other Person Date Attributes.

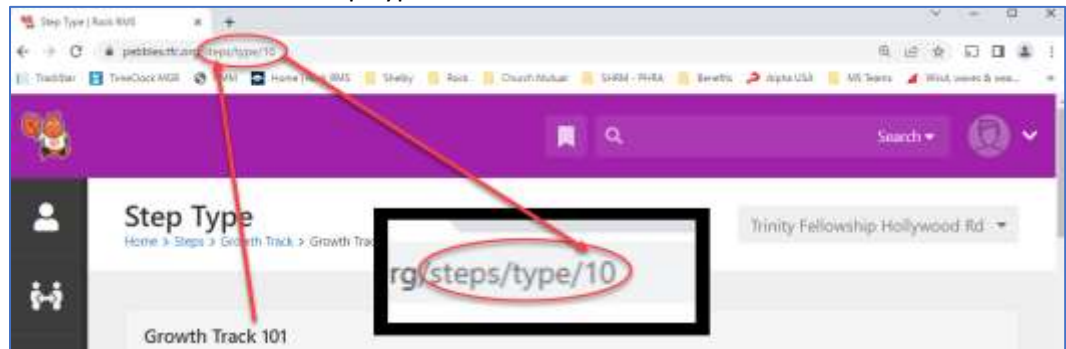
13. Step Type Id(s)

- a. GO TO “*People > Steps*”
 - i. Click on the Steps Program that contains the Step Type you want to create a metric for.



Step Programs				
	Name	Category	Step Types	Steps Taken
	Next Steps	Discipleship	6	11,538
	Growth Track	Discipleship	5	22,757
	Dream Team Onboarding	Discipleship	4	555

- ii.
- iii. Click the Step Type and note the Steps Type Id in the URL. For this example we are using our Growth Track 101 Class – Step Type Id #10.

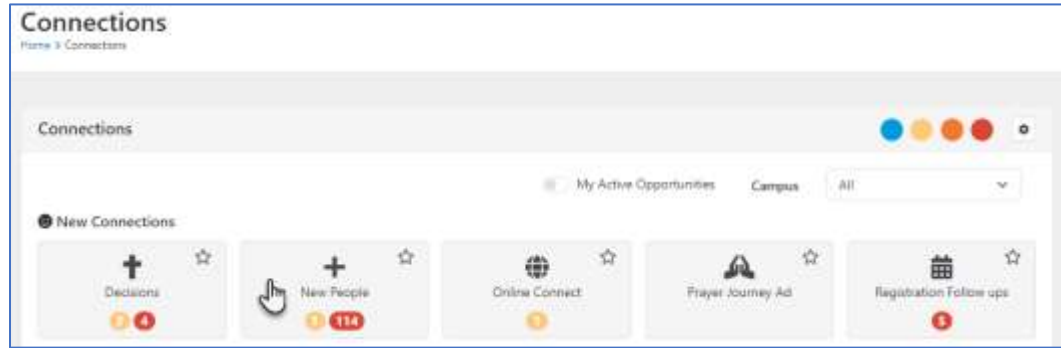


- iv.
- v. Continue for any other Step Types.

14. Connection Request Opportunity Id(s)

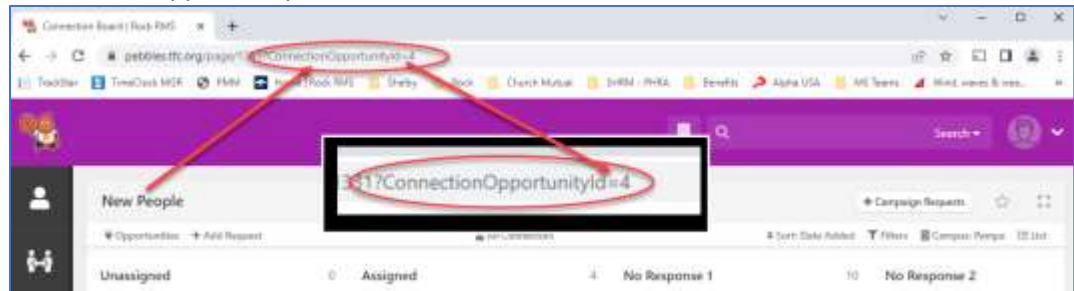
a. GO TO “*People > Connections*”

i. Click on the Connection Opportunity that you want to create a metric for.




ii.

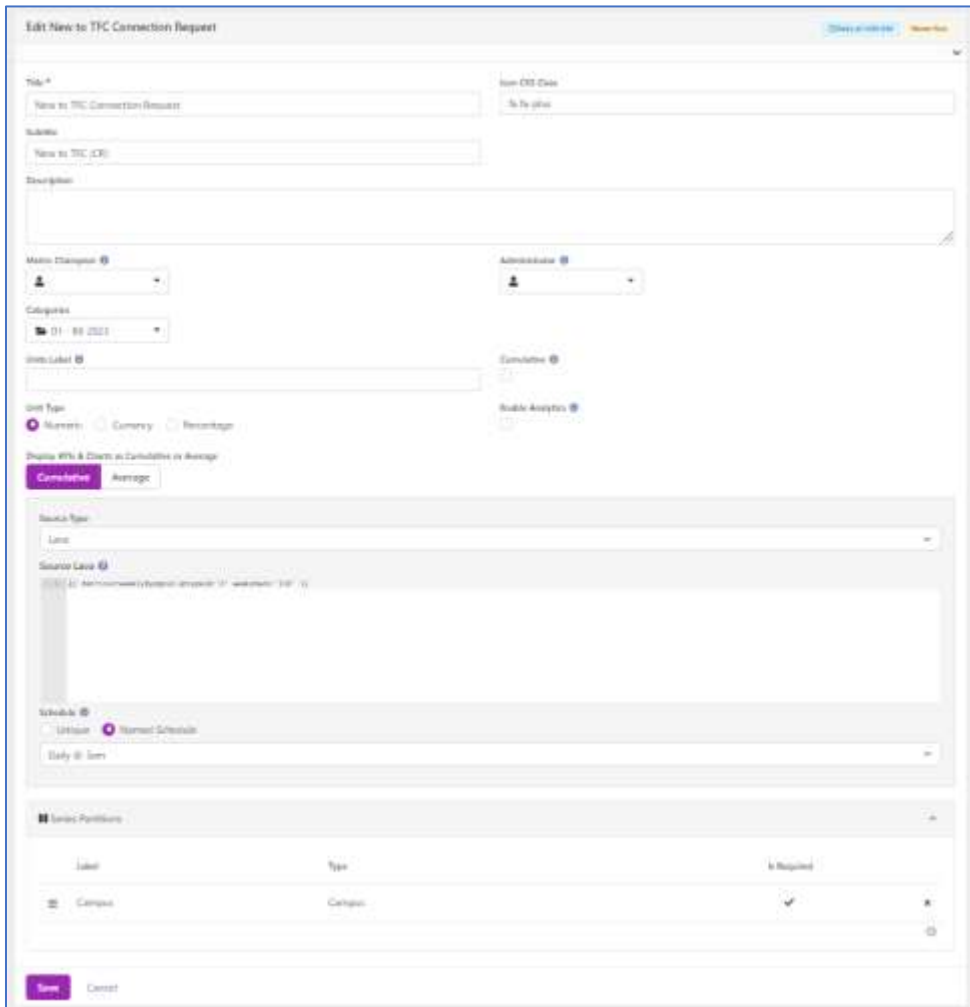
iii. Note the Connection Opportunity Id in the URL. For this example, we are using our New People Connection Opportunity – OP Id #4.



iv.

15. Let's build a Connection Opportunity Metric !!!

- a. GO TO "**Tools > Metrics**"
- b. Add a new Category if needed.
 - i. Use the folder with the plus to add a new category 
- c. With your category selected click the "+" to add a new metric. For our example we will build the New People Connection Request Opportunity Type #4.
- d. Title: **New People CRs by Opportunity (4)**
- e. Icon CSS Class: **fa fa-plus** – (Note this is used in the dashboard display.)
- f. Subtitle: **Leads (New People CRs)** – (Note this is used in the dashboard display.)
- g. Description: *** use as needed
- h. Categories: *** you can add additional categories if you would like.
- i. Unit Type: **Numeric**
- j. Source Type: **Lava**
- k. Source Lava: **{{ metricscrweeklybyoppid optypeid:'4' weeksback:'13' }}**
 - i. NOTE – for the first time run, you should calculate the number of weeks back for approximately 2 or more years. This will give you historical values for dashboard comparisons.
- l. Schedule: **Named Schedule**
 - i. Drop Down: **Daily # 3am**
- m. Series Partitions: **Campus *** required**
 - i. "+" to add
 - ii. Label: **Campus**
 - iii. Entity Type: **Campus**
 - iv. **SAVE**
- n. SAVE



The screenshot shows a form titled "Edit New to TFC Connection Request". The form contains the following fields and options:

- Title:** New to TFC Connection Request
- Subtitle:** New to TFC (CR)
- Description:** (Empty text area)
- Main Manager:** (User selection dropdown)
- Administrator:** (User selection dropdown)
- Categories:** (Dropdown menu showing "01 - 01 2021")
- Date Label:** (Empty text field)
- Unit Type:** ☒ Numeric, ☐ Currency, ☐ Percentage
- Display With & Charts as:** ,
- Source Type:** Lava
- Source Lava:** {{ metricscrweeklybyoppid optypeid:'4' weeksback:'13' }}
- Schedule:** ☐ Unknown, ☒ Named Schedule, Daily @ 3am
- Series Partitions:** (Table with columns: Label, Type, In Required)

Label	Type	In Required
Campus	Campus	<input checked="" type="checkbox"/>

At the bottom, there are "Save" and "Cancel" buttons.

o.

16. Continue to build your metrics using the appropriate lavashort code and information you gathered.
- Person Date Attribute
 - Using the `{{ metricspersondateattribute paid:'xx' weeksback:'xx' }}` replacing the xx with the appropriate attribute Id & number of weeks back.
 - Using the `{{ metricsstepsdateproperty stypeid:'xx' startcomplete:'xx' weeksback:'xx' }}` replacing the xx with the step type Id, *start* or *complete* & number of weeks back.
(Remember for the first time run you should set weeks back to two (2) plus years, then come back a change to 13 / 6 / 4 or whatever is your threshold for maintenance.)
17. *** Critical *** record your Metric Id for later use on the dashboard page(s)
- * Note – if the MetricId is not showing in the Url, just “Edit” & “Save” and it should be visible.

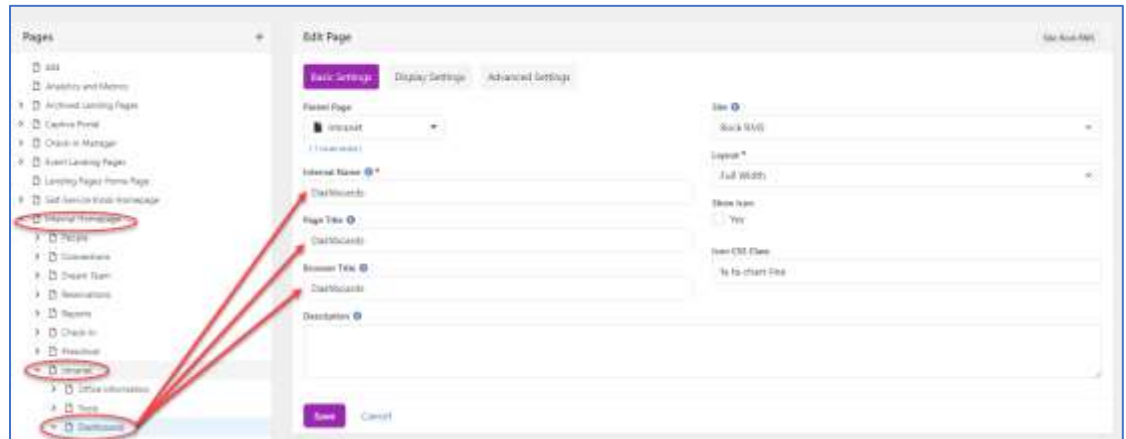
The screenshot shows a web browser window with the URL `pebbles.tfc.org/page/2807?MetricId=3728&MetricCategoryId=430&ExpandedIds=C897`. The `MetricId=3728` portion is circled in red. A red arrow points from this circle to another circle in the page content, which also contains the text `org/page/2807?MetricId=3728&MetricC`. The page title is "Metrics | Rock RMS". The left sidebar shows a navigation menu with icons for Home, Metrics, and other sections. The main content area displays a "Metric" card for "01 - RX 2023" with a subtitle "GT101" and categories "01 - RX 2023". A line graph is visible on the right side of the page.

b.

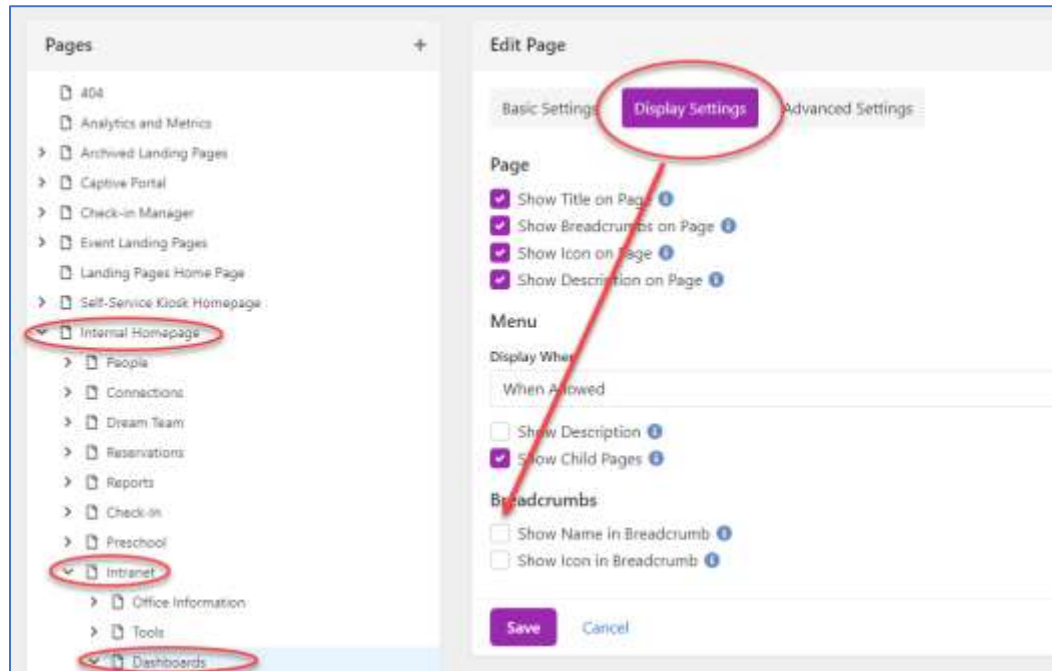
Let's build some pages and dashboards!

18. Building Out the Dashboard Pages

- a. GO TO **"Admin Tools > CMS Configuration > Pages"**
- b. In the left-hand tree find and select the **"Internal Homepage > Intranet **"**
 - i. **** Note change or build these pages out in the area that best works for your organization.**
 - ii. **These pages will inherit the security / access of the parent page "Intranet".**
- c. In the left-hand tree click the "+" to **"Add Page > Add Child To Selected"**
 - i. Internal Name: **Dashboards**
 - ii. Page Title: **Dashboards**
 - iii. Browser Title: **Dashboards**
 - iv. Site: **Rock RMS** * might be different at your organization.
 - v. Layout: **Full Width**
 - vi. SAVE

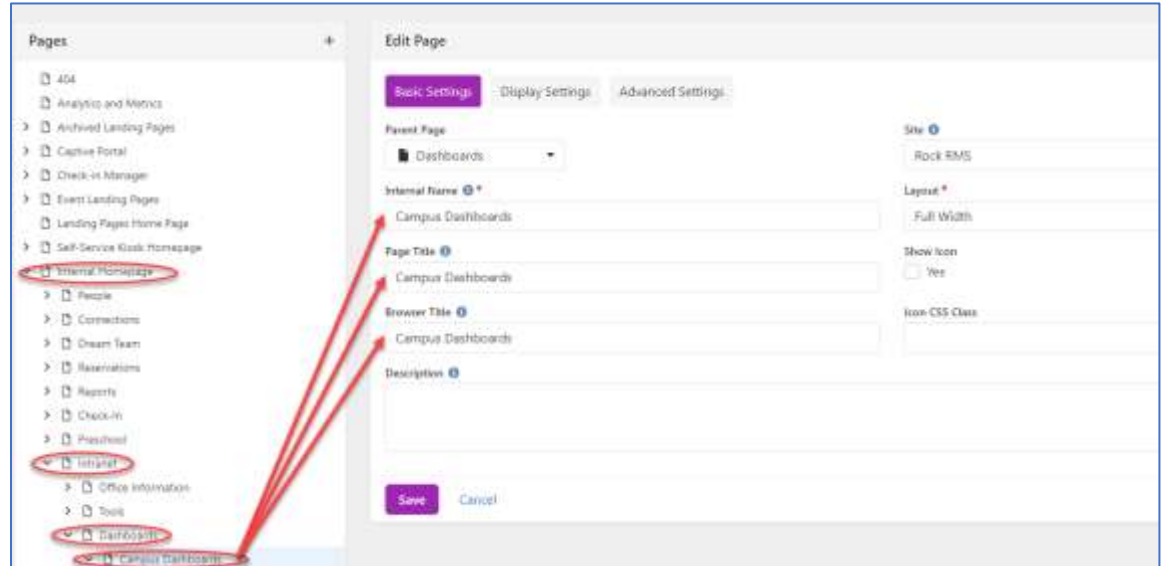


- vii. EDIT
- viii. GO TO **"Display Settings"** tab
 1. UNCHECK – "Show Name in Breadcrumb"

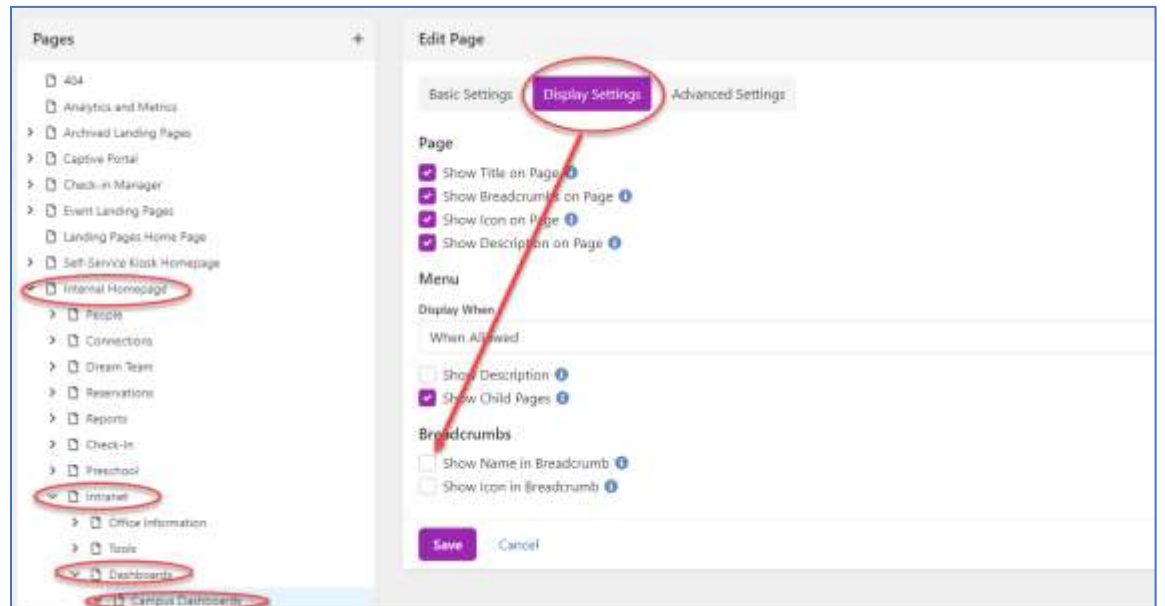


- x. SAVE
- xi. SAVE

- d. GO TO “*Internal Homepage > Intranet > Campus Dashboards*”
- e. In the left-hand tree click the “+” to “*Add Page > Add Child To Selected*”
 - i. Internal Name: **Campus Dashboards**
 - ii. Page Title: **Campus Dashboards**
 - iii. Browser Title: **Campus Dashboards**
 - iv. Site: **Rock RMS** * might be different at your organization.
 - v. Layout: **Full Width**
 - vi. SAVE

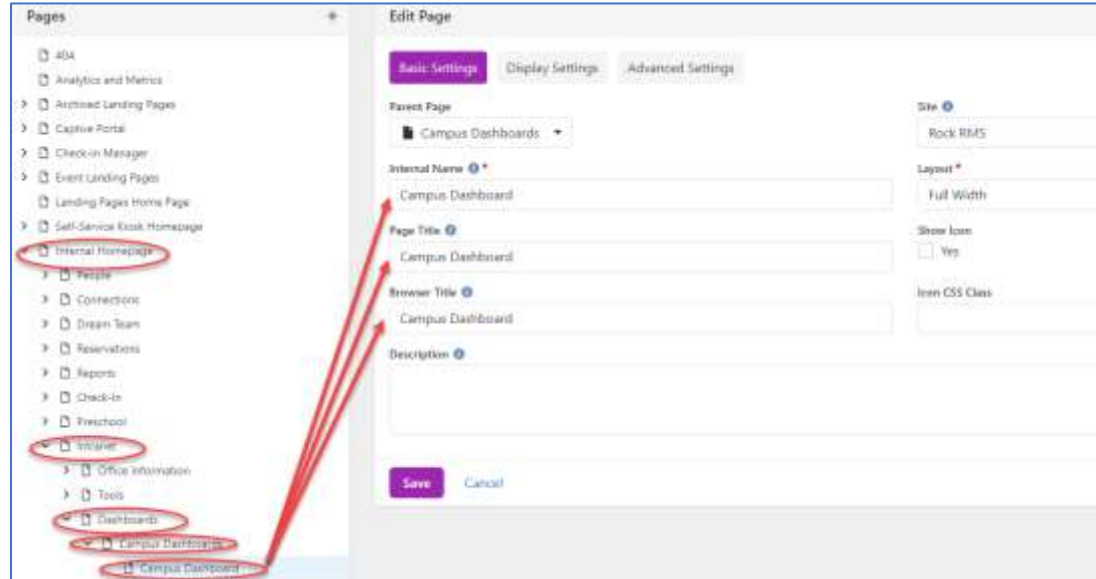


- vii. EDIT
- viii. GO TO “*Display Settings*” tab
 1. UNCHECK – “Show Name in Breadcrumb”

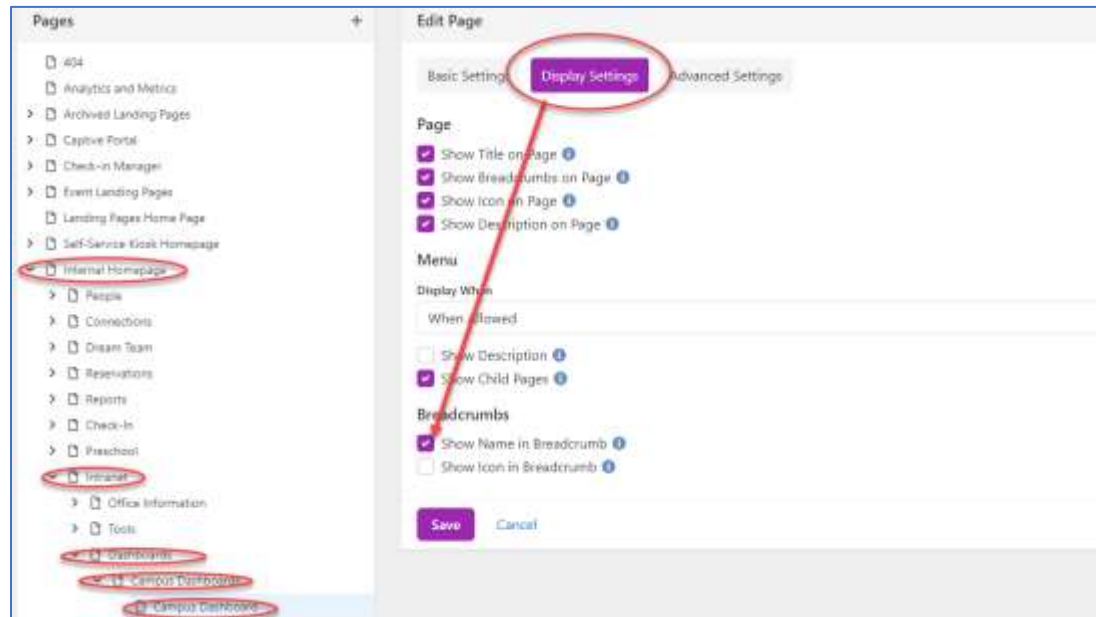


- x. SAVE
- xi. SAVE

- f. GO TO “*Internal Homepage > Intranet > Campus Dashboards*”
- g. In the left-hand tree click the “+” to “*Add Page > Add Child To Selected*”
 - i. Internal Name: **Campus Dashboard**
 - ii. Page Title: **Campus Dashboard**
 - iii. Browser Title: **Campus Dashboard**
 - iv. Site: **Rock RMS** * might be different at your organization.
 - v. Layout: **Full Width**
 - vi. SAVE

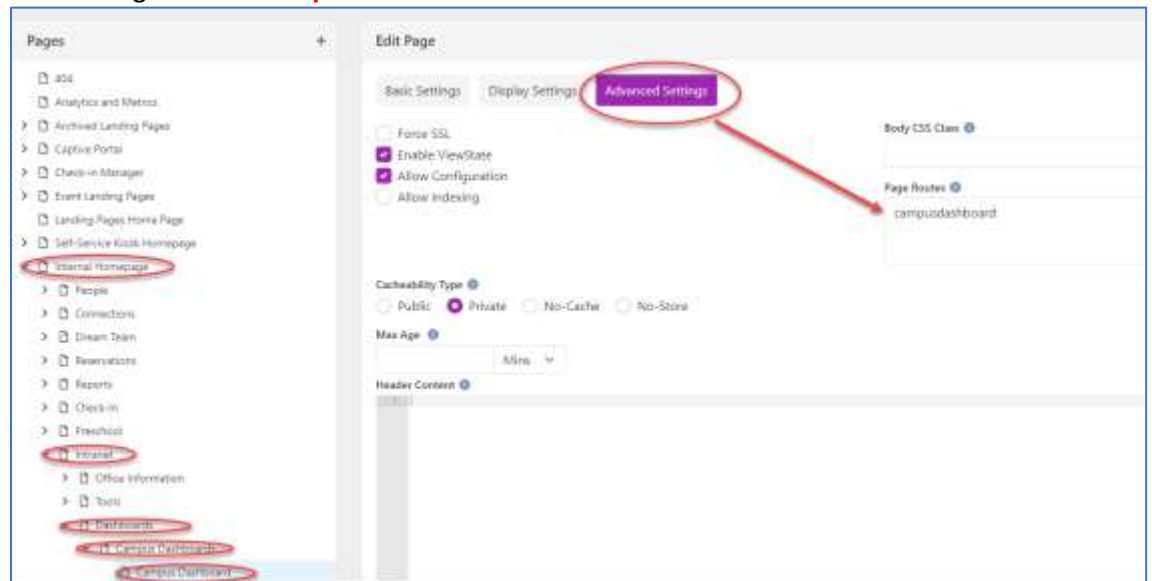


- vii. EDIT
- viii. GO TO “*Display Settings*” tab
 1. **CHECK** – “Show Name in Breadcrumb”

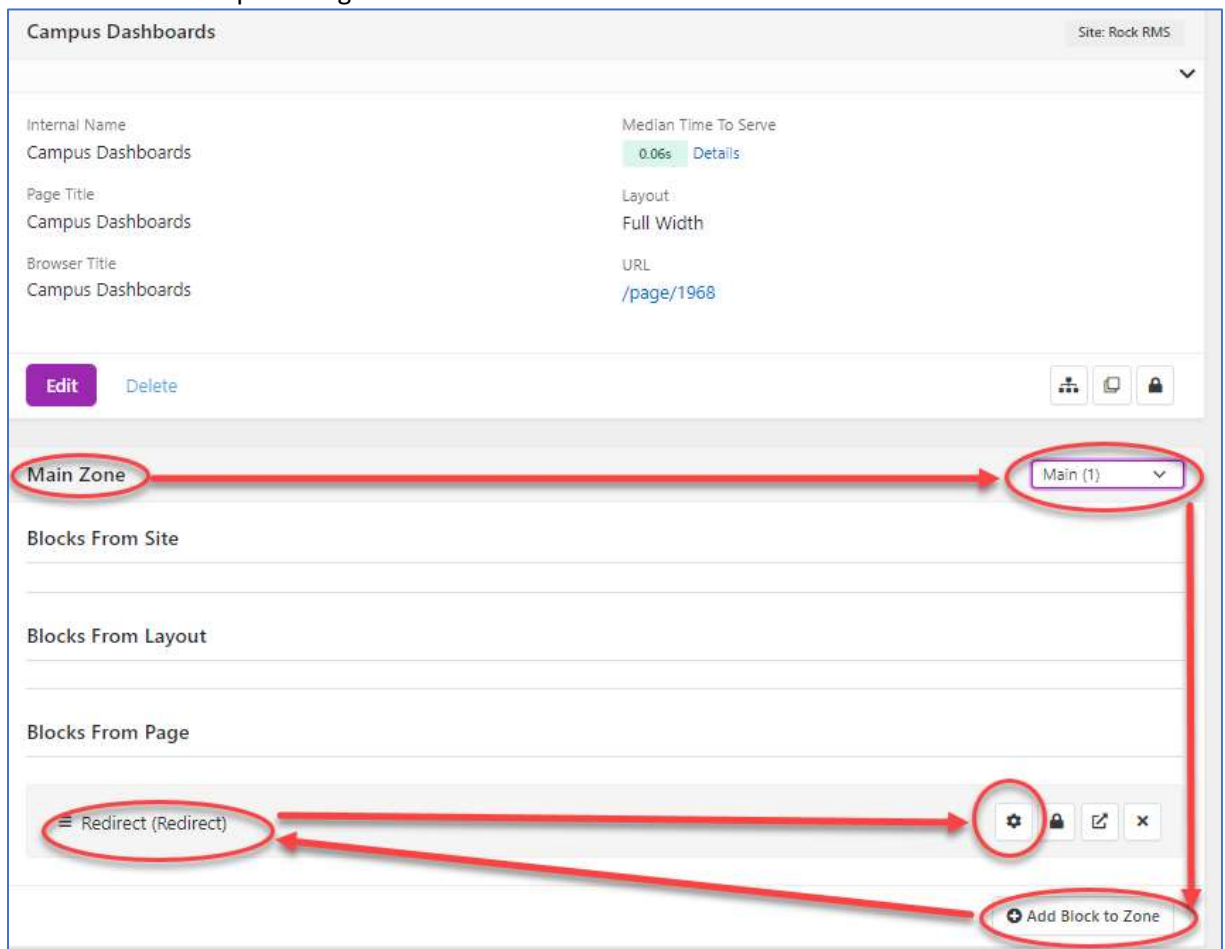


- x. SAVE
- xi. SAVE

- xii. GO TO “*Advanced Settings*” tab
 1. Page Routes: *campusdashboard*



- xiii.
 - h. SAVE
 - i. Return to left-hand tree & GO TO “*Internal Homepage > Intranet > Campus Dashboards*”
 - j. Select the “Main” from the drop down.
 - k. Click the “+ Add Block to Zone”
 - l. Add “Redirect” Block & SAVE
 - m. Click the “Block Properties” gear icon



- n.

- o. In the Basic Settings Tab
- i. Url: *~/campusdashboard*
 - ii. Redirect When: *Always*
 - iii. Permanent Redirect: CHECKED
 - iv. SAVE

Block Properties CMS / Id: 3529

Basic Settings Advanced Settings

Name

Redirect

Uri

~/campusdashboard 1

Redirect When

Always 2

Network

Permanent Redirect

☒ 3

Save Cancel

p.

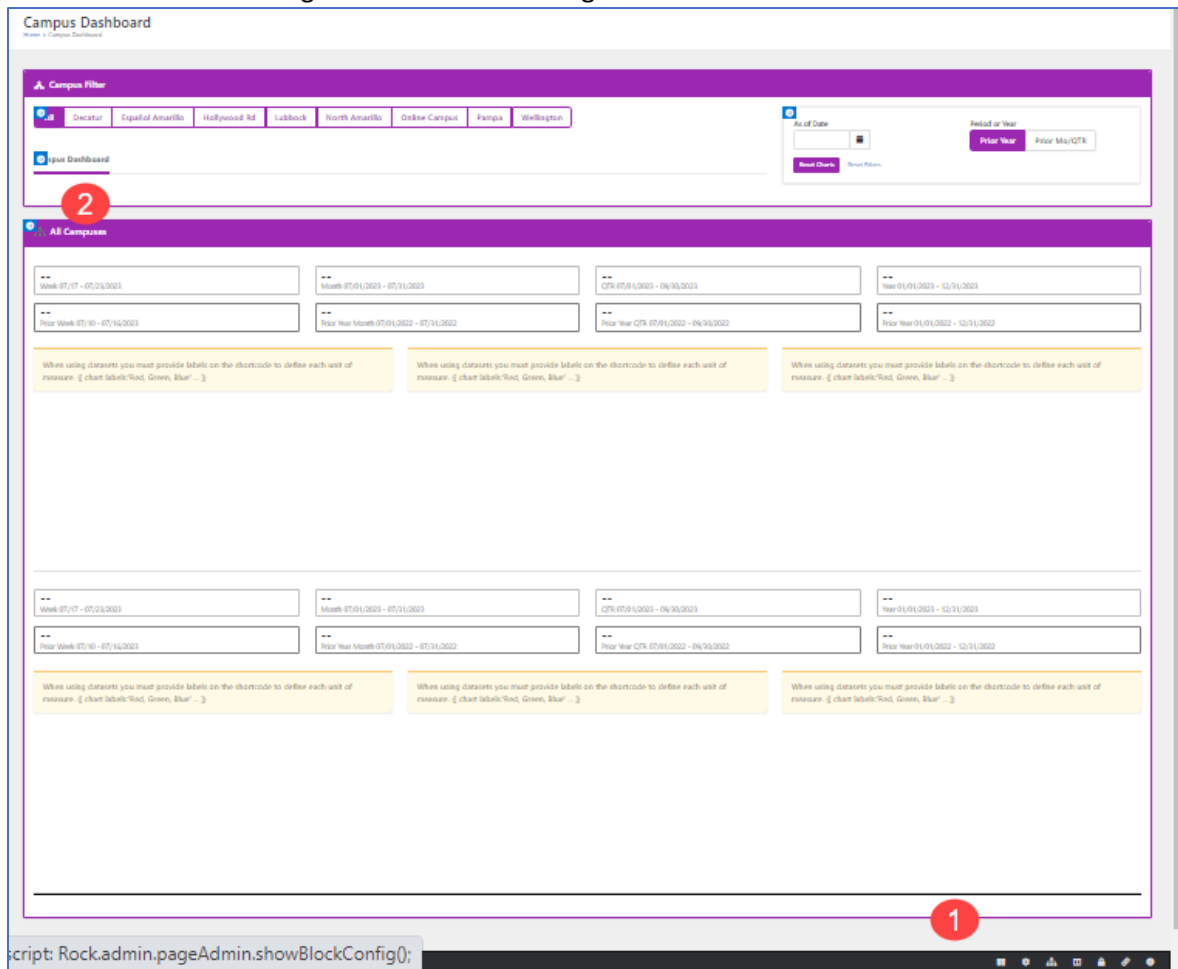
We're in the final stretch – this is where we begin to add the “Secret Sauce” to display our Dashboard !

19. GO TO “**Internal Homepage > Intranet > Campus Dashboards > Campus Dashboard**”

- Select the “Feature” from the drop down.
- Click the “+ Add Block to Zone”
- Add “HTML Content” Block, Name: **Campus Selector** & SAVE
- Add “Page Menu” Block, Name: **Sub Page Menu** & SAVE
- Add “Page Parameter Filter” Block, Name: **Page Parameter Filter** & SAVE
 - *** CRITICAL *** use instructions and codes in the “**08_Campus_Dashboard_Page_Block_Settings.txt**” to set all of the Block Settings and Parameters.
- SAVE
- Select the “Main” from the drop down.
- Click the “+ Add Block to Zone”
- Add “HTML Content” Block, Name: **Metrics by Campus** & SAVE
 - Use the “**09_Main_Dashboard_Lava.txt**” for the HTML Code
 - When you save you will get an error “Warning: the HTML has the following errors: end tag” If you wish to save anyway, click the save button... it is okay to SAVE
 - *** CRITICAL *** use instructions and codes in the “**08_Campus_Dashboard_Page_Block_Settings.txt**” to set all of the Block Settings and Parameters.

20. THE LAST OF THE INSTRUCTIONS !!!

- GO TO “**yourrocksite.com/campusdashboard**”
- You should see something similar to the following screenshot



c.

- d. Click #1 "Block Configuration"
- e. Hover over "Metrics by Campus" block and click "Edit HTML"
- f. Look for approximately line #50 "{% assign metricids = '0,0' %}"
 - i. Replace the 0,0 with your Metric Id saved from Instruction #17 above.
 - ii. Example {% assign metricids = '340,341' %}
 - iii. SAVE

```

19 {% if periodofyear == true %}
20   {% assign pyfomo = fomo | DateAdd:-1,'M' | AsDateTime | Date:'MM/dd/yyyy' %}
21   {% assign pyfomo = pyfomo | DateAdd:-1,'d' | AsDateTime | Date:'MM/dd/yyyy' %}
22   {% assign pyfoqr = foqr | DateAdd:-1,'M' | AsDateTime | Date:'MM/dd/yyyy' %}
23   {% assign pyfoqr = pyfoqr | DateAdd:-1,'d' | AsDateTime | Date:'MM/dd/yyyy' %}
24   {% assign priority = 'Prior' %}
25 {% else %}
26   {% assign pyfomo = fomo | DateAdd:-1,'Q' | AsDateTime | Date:'MM/dd/yyyy' %}
27   {% assign pyfomo = pyfomo | DateAdd:-1,'M' | DateAdd:-1,'d' | AsDateTime | Date:'MM/dd/yyyy' %}
28   {% assign pyfoqr = foqr | DateAdd:-1,'Q' | AsDateTime | Date:'MM/dd/yyyy' %}
29   {% assign pyfoqr = pyfoqr | DateAdd:-1,'M' | DateAdd:-1,'d' | AsDateTime | Date:'MM/dd/yyyy' %}
30   {% assign priority = 'Prior Year' %}
31 {% endif %}
32
33 {% comment %}
34 This is the SECRET SAUCE line "assign metricids". Here you enter a comma separated list that will display the metric KPIs / 12 week / QTR / Year over Year.
35 {% endcomment %}
36
37 {% assign metricids = '0,0' %}
38
39 {% assign metricidlist = metricids | Split:',' %}
40 {% assign unids = '' | Append:metricidlist | Append:',' %}
41 {% assign campuses = 'Global' | attributes:'ShortCodeMetricsCampuses','RawValue' | Split:',' %}
42 {% for cp in campuses %}
43   {% campus where:'Quid == "{{ cp }}"' securityenabled:'false' %}
44   {% if forloop.first == true %}
45     {% assign compusoid = campus.Id %}
46   {% else %}

```

- g.
- h. Refresh the page and you should see the KPIs & Charts fill in with you data.