

## Dashboard (Crystal Report) Installation

Save the Dashboard in the proper folder on your computer as follows:

(There will be other dashboards stored in the same folder)

Window XP

C:\Documents and Settings\All Users\Application Data\TRAMS\ClientBase\DashReports

Windows 7

C:\ProgramData\TRAMS\ClientBase\DashReports

Start ClientBase fresh and you can select this new Dashboard which can be run with no dates entered.

Note: we enclosed two dashboards. Most of you will want the "Current User" version, but if you are a beta user of 3.7 you can use the new one which allows you to consider branches.

Notes:

If you want to see Dashboards at the "Agency" level, your user login "Authorization Level" must be designated as a manager. (not user)

If you currently cannot see any dashboards or do not use TCR, you will have to contact the Trams support desk for assistance initially installing TCR (Trams Crystal Reporting) so that you can see the dashboards. [support@trams.com](mailto:support@trams.com) or 310-641-8726

Any person who wishes to use this dashboard will have to save a copy in their dashboard folder on their own computer in their dashboard folder.