Introduction to The New Navigation System

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Dashboard				
Manage				
2 Reports	88	igodot	•	
Saved reports	Dashboard	Reports	Tracking	Tenant
Saved reports v2			Î	
Calendar				

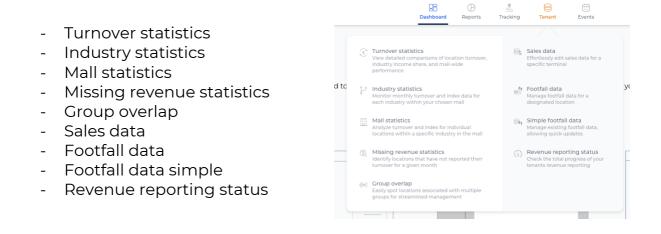
In the new navigation system, some of the menu points have been merged into one menu point.

The Dashboard remains the same

The Calendar is renamed to Events

Maps is renamed to Tracking

Manage is renamed to Tenant and will include:



Reports + Saved reports + Saved reports v2 + Shared reports are merged into one system \rightarrow Reports, which is further explained in the section "Introduction to The New Folder System".

Setup Pages

				0	🙆 Setup 🕚 🕕
Maps	Locations				Ð
Maps v2 (BETA)					
	Search for locations		Order by name	a v Order by ascending v Sh	sw all 🗸 🗸 🔍
O Locations	ld Name	Custom shop id	M ² Parent group	Group	Active date Closing date
Contacts	×				
Groups	×				
Tags					
Roles	Showing 1 to 3 of 3 results				
Opening hours					
Health checks					
Sensor export					
Data import					
Data templates					
Email templates					
GDPR					
Custom fields					
Assets					
Notes					
Log activity					
Default user settings					
Password policy					
<					

The menu points shown on the picture above have been moved from the side to the top middle as shown on the picture below.

Home > Companies >	> Lo	cations							
	Sources ~	Templates 🖌	Data Manager 🗸	Employee settings 🗸	Customization \sim	Logs 🗸 🛛 Other 🗸			
Locations									
Q Search locations									+
ID Name			Custom shop ID	M²	Parent group	Group	Active date	Closing date	

Some menu items have been grouped together:

In Sources you will find:	Sources ¥
- Locations	
- Tags	🗋 Tags
- Groups	🏽 Groups
In Data manager you will find:	Data Manager 🗸
- Sensor export	🐝 Sensor export
- Data import	B→ Data import
- Data templates	Data templates
In Employee settings you will find: - Roles	Employee settings 🗸
- Password Policy	, 𝔅 Roles
- Default user settings	∞ Password Policy
- Contacts	요리 Default user settings
In Customization you will find: - Custom fields - Assets - Notes - Email templates	Customization V Custom fields Assets Notes Email templates
In Logs you will find: - GDPR - Activity log	Logs ✓ Other ⓐ CDPR ⓐ Activity log
In Other you will find: - Opening hours - Health checks	Other V Opening hours Health checks

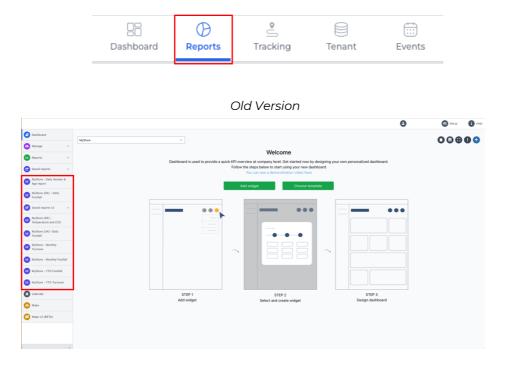
The other pages which also have a side menu like in the location list, for example *Users, Views, Services* and more will have the same layout as the picture shown above.

Introduction to The New Folder System

Where will the legacy/existing reports be placed in the new folder system?

All legacy/existing reports will be placed inside *My Files* which can be found inside the Reports.

Press the Reports button and all reports will be shown (See picture New Version).



New Version

) My Files	Q Search		ه ک
> Favorites	Nyfiles >		
Shared with me	🧉 My Files		
, Exports	Name #	Shared	Last updated
] Deleted files	MyStore (UK) - Daily Footfall	Not shared	3 minutes ago
	MyStore (DK) - Temperature and CO2	Not shared	4 minutes ago
	MyStore (DK) - Daily Footfall Footsal	Not shared	7 minutes ago
	MyStore - YTD Turnover	Not shared	2 seconds ago 🔅
	MyStore - YTD Footfall	Not shared	39 seconds ago 🔅
	MyStore - Monthly Turnover	Not shared	2 minutes ago
	MyStore - Monthly Footfall	Not shared	1 minute ago

The users will be able to create their own folders and place their reports in which ever structure they want.

Creating a new folder

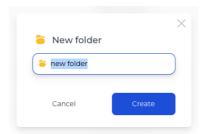
To create a new folder simply click the folder button on the top right corner.

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New folder button placement

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☆ Favorites	Myrfles >		
 shared with me 	🗧 My Files		
🛓 Exports	Name 4	Shared	Last updated
Deleted files	MyStore (UK) - Daily Footfall	Not shared	3 minutes ago
	MyStore (DK) - Temperature and CO2	Not shared	4 minutes ago 🔡
	MyStore (DK) - Daily Footfall (Footfall)	Not shared	7 minutes ago
	MyStore - YTD Turnover	Not shared	2 seconds ago
	MyStore - YTD Footfall	Not shared	39 seconds ago
	MyStore - Monthly Turnover	Not shared	2 minutes ago 🔅
	MyStore - Monthly Footfall	Not shared	1 minute ago

A pop up will appear, where you will be able to enter a folder name and then create the folder.



Modal/Pop up – enabling you to type a folder name

Through this feature, the users will be able to create their own folder structure and will enable the users to have a storing system, where they easily can find and sort their reports.

) My Files		Q Search		a a
 Regional Director Rep Demographics 		My files >		
 Environmental (IoT) Re Store manager reports 	•	My Files	Shared	Last updated
7 Favorites		Environmental (IoT) Reports	Shared Not shared	Last updated 🔸
Shared with me ↓ Exports		Store manager reports	Not shared	41 seconds ago
] Deleted files		Regional Director Reports	Not shared	1 minute ago
		Demographics 1 file	Not shared	1 minute ago 🕴
		MyStore - YTD Turnover	Not shared	1 hour ago 🕴

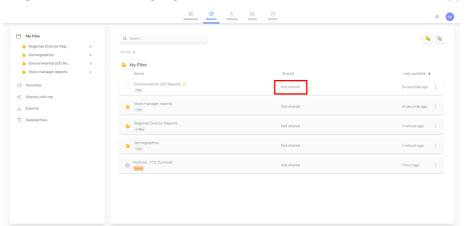
An example of a folder structure

Sharing a folder or report

In this update, the users will be able to share all their reports to roles and users no matter which report version they have.

If a folder is shared, all the folders content will automatically be shared with whoever the folder is shared with.

There are multiple ways to share a folder or report. You can click either on the specific report/folder share status (see picture below)



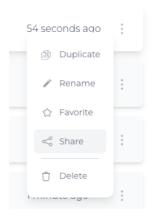
Clicking the "Not shared" highlighted with a red box, a share modal/box will appear

OR you can click on the icon with the three dots to the far right on the folder/report and from there click on the share button (see picture below).

The icon with the three dots

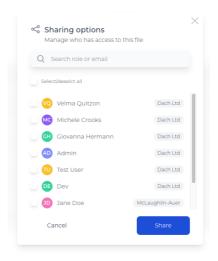
My Files	Q Search_		۵ ک
 Demographics Environmental (IoT) Re 	My Files		
Store manager reports +	Name	Shared	Last updated 🔒
Favorites	Environmental (IoT) Reports 😒	Not shared	54 seconds ago
Shared with me	Store manager reports Trie	Not shared	41 seconds ago
Deleted files	Regional Director Reports	Not shared	1 minute ago 🛛 🚦
	Eemographics Trie	Not shared	1 minute ago 🛛 🚦
	MyStore - YID Turnover	Not shared	1 hour ago 🕴

The menu pop up which will appear after pressing the icon with the three dots



A modal/pop up will appear where the users will see a list with all roles and users, they can share the folder or report with. Simply select the users or roles and click the share button.

Share modal/pop up with a list of roles and users



Drag n Drop

Folders and reports are draggable, enabling users to easily move their folders and reports to any folder.

Simply click and hold the mouse button down and then release the button once you are hovering over the folder you wish to place the folder/report in.

Multiselect

The users are also able to multiselect reports and folders, allowing to move or delete multiple reports and folders at the same time.

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My Files Regional Director Rep Demographics Environmental (IoT) Re	4	Q Search		6
 Store manager reports Favorites 	*	MyStore - VT.	MyStore - Ma.	
\propto_0° Shared with me		My Files Name +	Sharad	Last undated
 ↓ Exports ① Deleted files 		Demographics 1 file	Not shared	58 minutes ago
		Environmental (IoT) Reports	Not shared	58 minutes ago
		MyStore - YTD Turnover ★	Not shared	2 hours ago
		Regional Director Reports	Not shared	59 minutes ago
		Store manager reports	Not shared	58 minutes ago
			1item selected All None 10. 0 Delete	