

CONFIGURABLE DASHBOARDS

Configurable Dashboards allow you to customize and combine the content that you can view. Dashboards reduce the need to search for frequently used features by placing them all in a single location.

Creating Personal Dashboards

End-users with the appropriate permission are able to create personal dashboards. A personal dashboard can be seen and accessed only by the user who created it. As with organization dashboards, the available functions vary based on licensed products. In addition, the functions available to the end-user to include on the dashboard vary based on the user's permissions.

STEP-BY-STEP

1. Locate your User menu in the top-right banner. Click your name and then select **Dashboards**.
2. Click the **Create Dashboard** button.
3. Enter a name for the dashboard in the Name field.
4. Click **Create**.

Adding Dashboard Widgets

Widgets are the actual content included in the dashboard. For example, an organization message is included in the dashboard by adding an Organization Message Widget. Showcases are included by adding a Showcase widget. Other available widgets include Document Search, Product Search, Quick Links, Bookmarks, and more. The ability to add and access widgets on a dashboard is based on a user's permissions. End-users are not able to add widgets to which they do not have access on their personal dashboards. For example, if you do not have permission to access Document Search, you will not be able to add that widget to your dashboard.

STEP-BY-STEP

1. Create a new dashboard or open an existing dashboard for editing.
Note: When you select to edit an organization dashboard, a message will display if changes have already been made to the dashboard that have not been published. You will have the option to restore or remove those changes.
2. If the dashboard has any existing widgets they are displayed. Click the button. The Add Widget window displays.
3. Available widgets are categorized. The display defaults to the All category, which lists all available widgets alphabetically. The categories available depend on your permissions and your organization's licensed products. Some widgets are available in more than one category - this is simply to help mitigate the need to access multiple categories. You can select an option in the Widget Category dropdown to help identify the widgets you want to add to the dashboard.
4. **Note:** Please see the table below for a list of widgets and the associated categories.

5. Click the **Add** button for the widget you are adding to the dashboard. A window displays.
6. The Name field defaults to the name of the widget (Document Search, Bookmarks, etc.). You can overwrite it with a customized name for the widget that displays on the dashboard. For example, you may want to change the "Product Search" widget name to "Search for Items".
7. Click **Save Changes**.
8. Repeat steps 2 - 6 for each widget you would like to add to the dashboard.