Quick Start Guide: Dashboard

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Overview

The Dashboard page presents information from various other pages in small moveable windows called panels. You can customize your personal dashboard with any combination of panels (determined by your entitlements within the system) that provides you with the most relevant information you need.

For example, you can add multiple "Important Account Balance" panels to provide a quick view of all account balances you need easy access to in the course of your day-to-day operations. In addition, some panels allow you to take action on information and links directly from the panels.

Learn more about how you can create your customized Dashboard below.
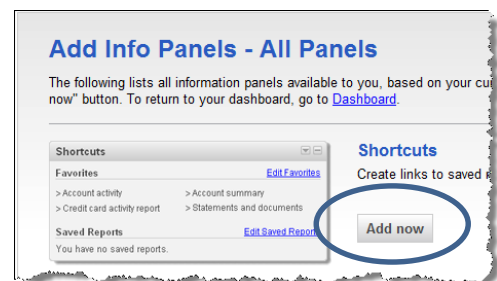
Adding a Panel

The first time you access the Dashboard, only the Alerts and Messages panel is shown. To add more panels, do the following:

1 On the Dashboard, click the **Add Info Panels** link located to the right of the last login date/time. This opens the Add Info Panels – All Panels page.

2 On the Add Info Panels – All Panels page, click the **Add now** button associated with each panel you want to add. The panel is added to the Dashboard and a confirmation message appears.

**3** Click one of the Dashboard links available on the Add Info Panels – All Panels page to return to the Dashboard.

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Adding Accounts – Important Account Balances Panel

If you add the Important Account Balances panel to the Dashboard, you will need to edit the panel to include the accounts you want to view. To add accounts, do the following:

1 On the Important Account Balances panel, click the Edit accounts displayed link. This opens the Edit Important Account Balances pop-up.
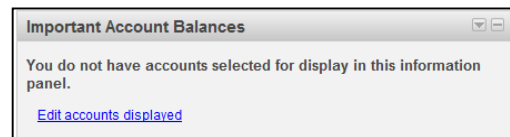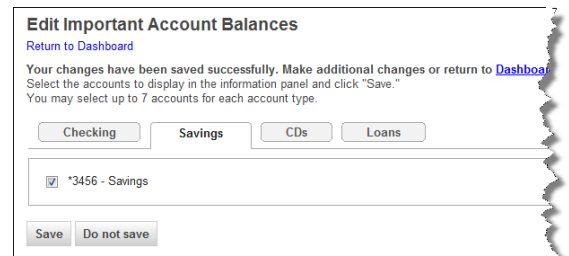
2 On the Edit Important Account Balances pop-up, click the tab associated with account type you want to add and then click the checkbox associated with each account you want to add.
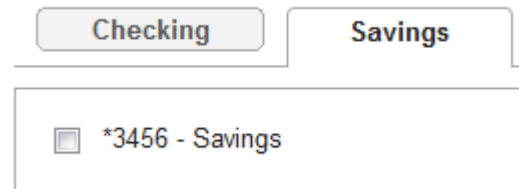
Up to seven accounts can be selected for each account type.

3 Click **Save.** A confirmation message appears on the Edit Important Account Balances pop-up.

4 Click the Return to Dashboard or **Dashboard** link, or click the ✖ in the upper-right corner of the pop-up to close it and return to the Dashboard.
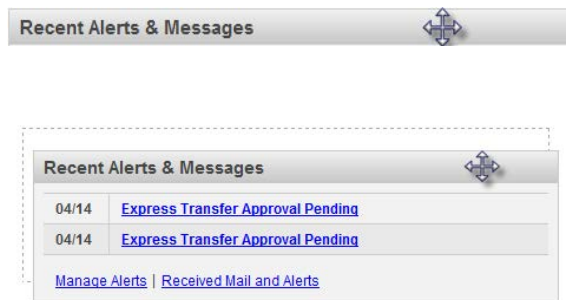
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Moving a Panel

Once you have added panels, you can arrange them in any order you want. To change a panel's location on the Dashboard, do the following:

1 Place your mouse cursor over the header of the panel you want to move until the mouse cursor changes to the move ✛ icon, indicating the panel can be moved.

2 Drag the panel to the desired area on the Dashboard. A dotted outline indicates locations to which the panel can be moved.

Deleting a Panel

All panels, except the Recent Messages & Alerts panel, can be deleted from the Dashboard. To delete a panel, do the following:

1 On the panel's header, click the drop-down arrow ▾.

2 Click the Delete this panel link.
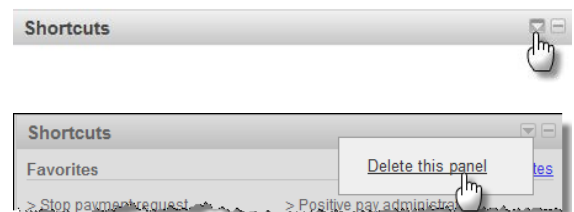
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Panel Controls

All panels include controls that allow you to take action on items or allow you to quickly go to pages associated with the panel. The controls available vary by panel.

Minimize or Maximize

All panels, except for the Recent Messages & Alerts panel, can be minimized or maximized by using the controls in each panel's header.

- Minimizes the panel. When a panel is minimized, the maximize control is hidden.
- Maximizes the panel. When a panel is maximized, the minimize control is hidden.

Links

Listed below are the links that may appear on a panel.

Edit accounts displayed	Change accounts shown in the Important Account Balances panel.	All approvals	View all items pending approval.
Manage alerts	Go to the Manage alerts page.	My decisions	View only items pending a decision by you.
Received mail and alerts	Go to the Received Mail and Alerts page.	All decisions	View all items pending a decision.
Edit favorites	Add/delete links to your favorite pages.	Add	Go to the page associated with the item that allows you to add it, such as adding a template or a user profile.
Edit Saved Reports	Modify saved report criteria.	Edit	Go to the page associated with the item that allows you to edit it, such as editing a template or a user profile.
My approvals	View only items pending your approval.	Delete	Go to the page associated with the item that allows you to delete it, such as deleting a template or a user profile.

Note: Some panels include other links that are not described above that also provide direct access to pages associated with the panel.

Drop-down Arrows

Drop-down arrows displayed next to sub-headings on a panel, such as the one shown here, allow you to go to pages that are associated with the panel.