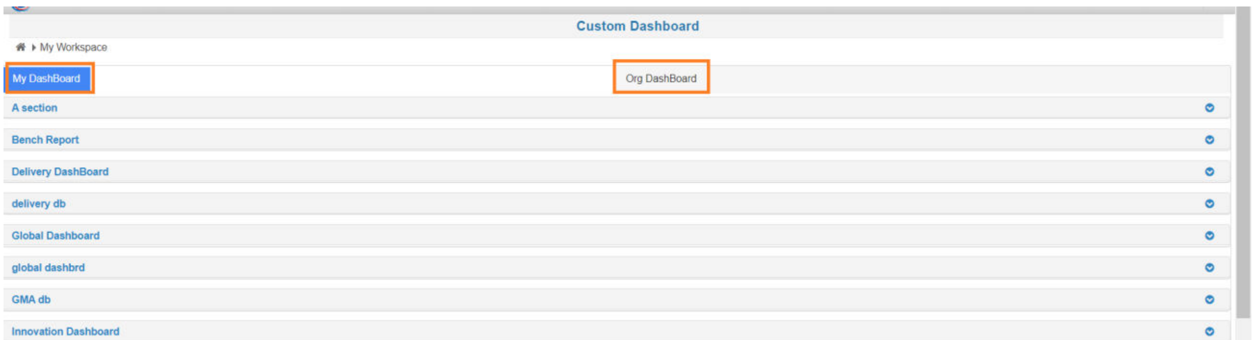
Contents

Custom Dashboard 2
1. My Dashboard 2
2. Org Dashboard 2
3. Process Flow 2
4. Dashboard View 5

Custom Dashboard

This screen can be customized based on the user preference and can where they can save those filters which will be used for obtaining the certain type of report by the name and creating Subsection based on their convenience which will be familiar for them to look for and the screen is internally divided into 2 parts i.e., My Dashboard and Org Dashboard.



1. My Dashboard

Here all the saved searches that a particular user were creating for their particular scenario can be saved and accessed.

2. Org Dashboard

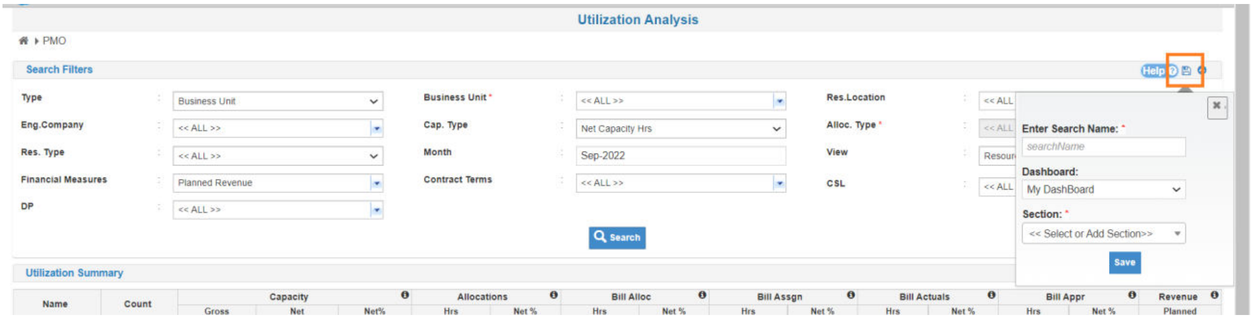
Here by saving and particular report and saved filters in this section then that report will be visible for people all over the organization. (If in case to delete a particular report in this section only the user who had created will have access to delete the particular report)

3. Process Flow

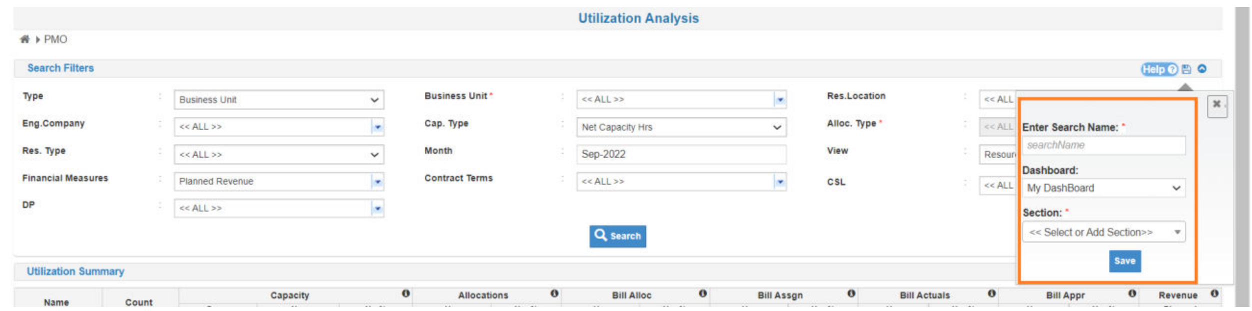
Steps to be followed for saving a report into Custom Dashboard were as follows,

Step 1: Navigate to the screen which you were looking to add in to the custom dashboard view.

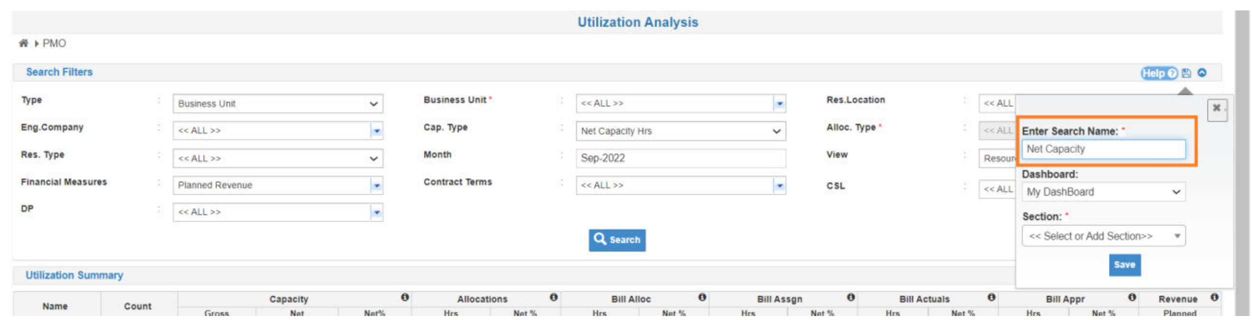
Step 2: By selecting and searching the data using the certain filter then click on the (Save Icon Present in the top right corner of screen as shown below)



Step 3: Now we can see certain selections and data that needs to be updated before saving this search.

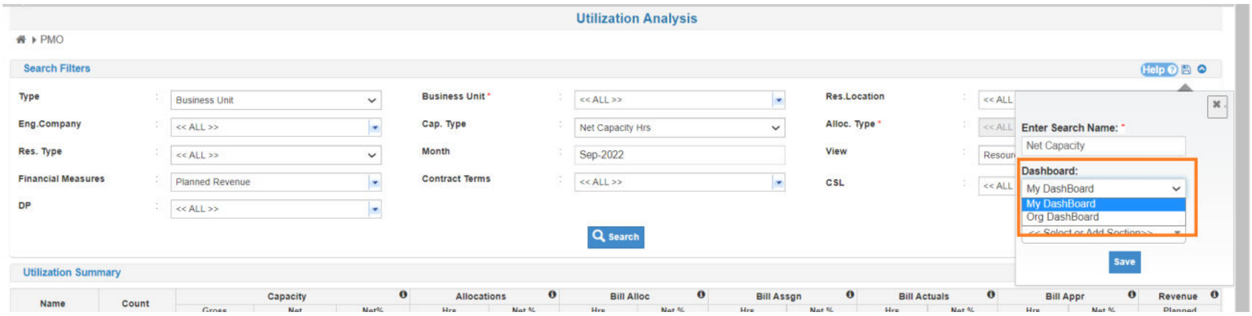


Step 4: Search Name: Here need to provide the name to the report (the name that is provided will be displayed in the dashboard for that particular report)

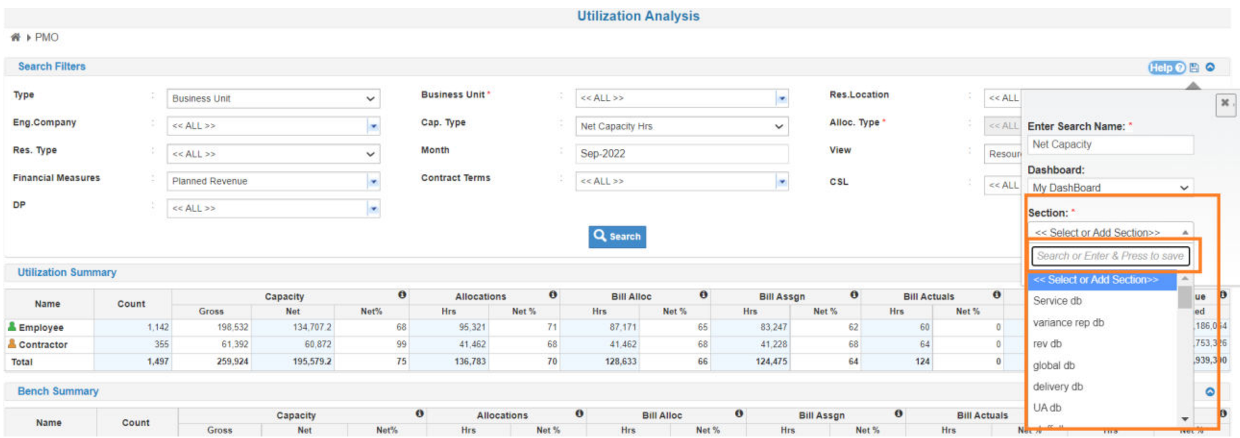


Step 5: Dashboard: Here need to select the path where this particular report needs to be saved onto, there will be 2 selections in this dropdown i.e., My Dashboard and Org Dashboard.

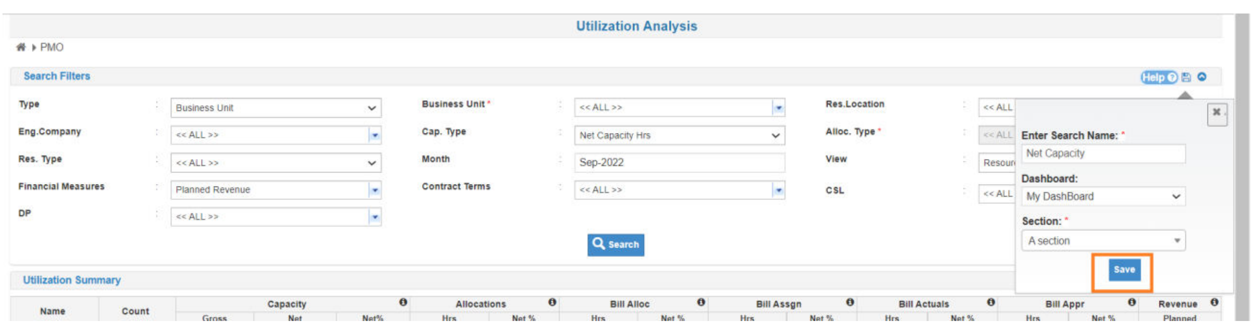
a. By selecting the My Dashboard, the report, we are saving will be visible to the person who has created the report.
b. By selecting the Org Dashboard, the report will be saved in the Org Dashboard view and will be visible to everyone across the organization.

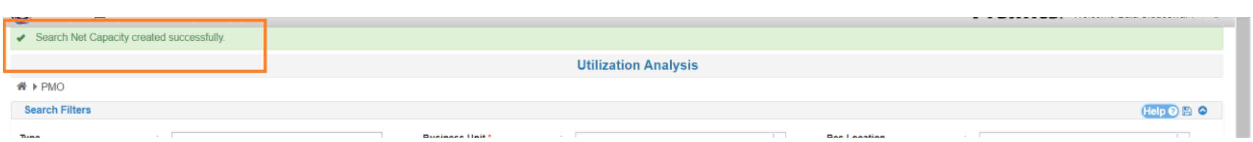


Step 6: Section: Here the user needs to create or select the Section where in a subsection will be created by the name, we provide in this particular Sub-Section can have multiple number of reports saved based on the requirement and usage.



Here the user can select the section name for the list of names already created or can enter the that they think is suitable and after the Entering the Name need to Click on “Enter” and by clicking on the Save button this particular search will be saved in the Custom Dashboard view.

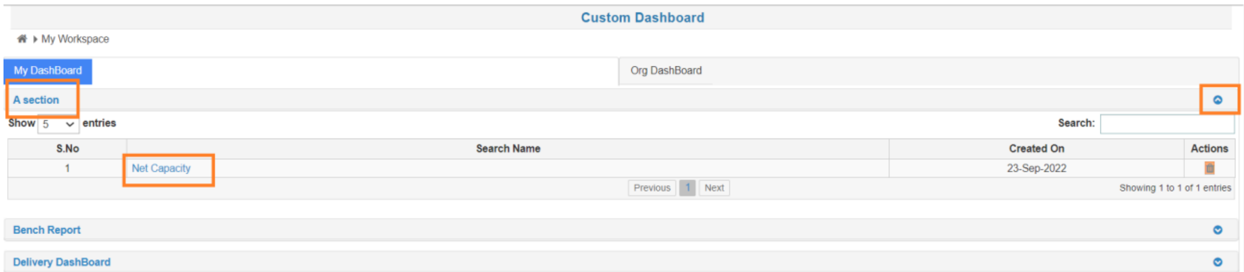




4. Dashboard View

Once the above saved search is performed successfully this particular report or search view can be seen in the Custom dashboard view as shown below.

a. My Dashboard view



b. Org Dashboard view