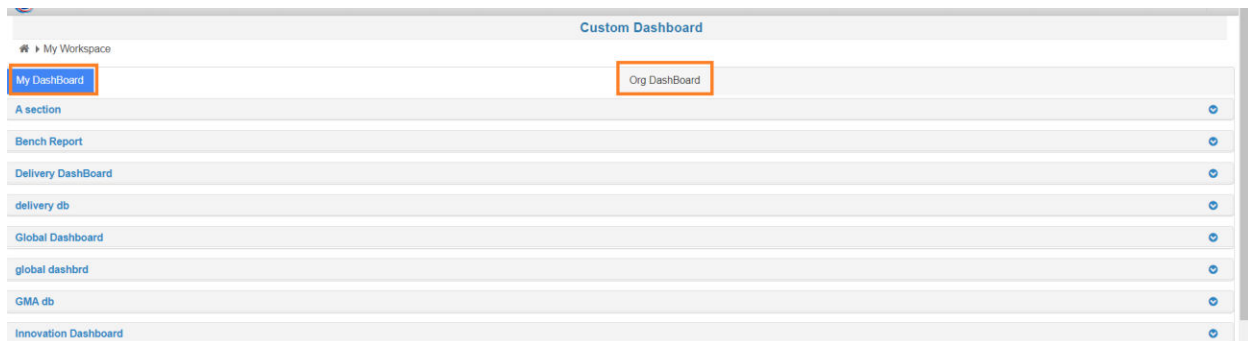


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## Custom Dashboard

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)

The screenshot shows the 'Utilization Analysis' search filters page. The 'Enter Search Name' field is highlighted with a red box. The page includes various dropdown menus for filters such as Type, Eng. Company, Res. Type, Financial Measures, DP, Business Unit, Cap. Type, Month, Contract Terms, Res. Location, Alloc. Type, View, and CSL. A 'Search' button is located below the filters. The 'Utilization Summary' table is visible at the bottom, showing columns for Name, Count, Capacity, Allocations, Bill Alloc, Bill Assign, Bill Actuals, Bill Appr, and Revenue.

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

This screenshot is identical to the previous one, showing the 'Utilization Analysis' search filters page with the 'Enter Search Name' field highlighted by a red box.

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)

This screenshot shows the 'Utilization Analysis' search filters page with the 'Enter Search Name' field highlighted by a red box. The text 'Net Capacity' has been entered into the field.

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.

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

The screenshot shows the 'Utilization Analysis' dashboard. On the left, there are search filters for Type, Eng. Company, Res. Type, Financial Measures, DP, Business Unit, Cap. Type, Month, Contract Terms, Res. Location, Alloc. Type, View, and CSL. A 'Search' button is located below these filters. On the right, a dropdown menu is open, showing options for 'Dashboard' (My Dashboard, Org Dashboard) and 'Section' (Select or Add Section). A 'Save' button is also visible.

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.

The screenshot shows the 'Utilization Analysis' dashboard. On the left, there are search filters for Type, Eng. Company, Res. Type, Financial Measures, DP, Business Unit, Cap. Type, Month, Contract Terms, Res. Location, Alloc. Type, View, and CSL. A 'Search' button is located below these filters. On the right, a dropdown menu is open, showing options for 'Section' (Select or Add Section). A 'Save' button is also visible.

Name		Count	Capacity			Allocations		Bill Alloc		Bill Assign		Bill Actuals		Bill Appr	Revenue
			Gross	Net	Net%	Hrs	Net %	Hrs	Net %	Hrs	Net %	Hrs	Net %	Hrs	Planned
Employee	1,142		198,532	134,787.2	68	95,321	71	87,171	65	83,247	62	60	0		
Contractor	355		61,392	60,872	99	41,462	68	41,462	68	41,228	68	64	0		
Total	1,497		259,924	195,579.2	75	136,783	70	128,633	66	124,475	64	124	0		

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.

The screenshot shows the 'Utilization Analysis' dashboard. On the left, there are search filters for Type, Eng. Company, Res. Type, Financial Measures, DP, Business Unit, Cap. Type, Month, Contract Terms, Res. Location, Alloc. Type, View, and CSL. A 'Search' button is located below these filters. On the right, a dropdown menu is open, showing options for 'Section' (A section). A 'Save' button is also visible.

Search Net Capacity created successfully

## 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

Custom Dashboard

My Workspace

My Dashboard: Org DashBoard

A section

Show 5 entries

S.No	Search Name	Created On	Actions
1	Net Capacity	23-Sep-2022	

Previous 1 Next

Showing 1 to 1 of 1 entries

Bench Report

Delivery DashBoard

### b. Org Dashboard view

Custom Dashboard

My Workspace

My DashBoard

Bench org

Show 5 entries

S.No	Search Name	Created On	Actions
1	Bench data	23-Sep-2022	

Previous 1 Next

Showing 1 to 1 of 1 entries

Resource Overview