

# DASHBOARD SETUP

## USER BASICS

# DISCLAIMER

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# USER BASICS

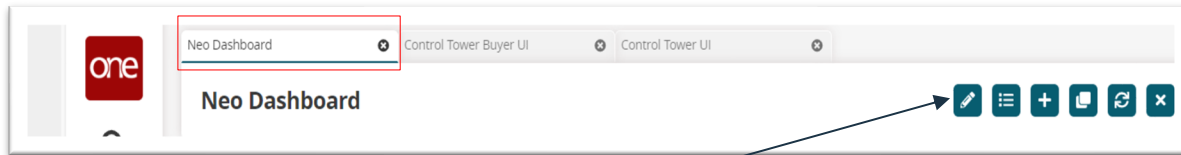
## Dashboard Setup

- Dashboard Personalization
- Dashboard Layout Configuration
- Widget Setting and Saving
- Creating a Shortcut Widget
- Creating a Favorite

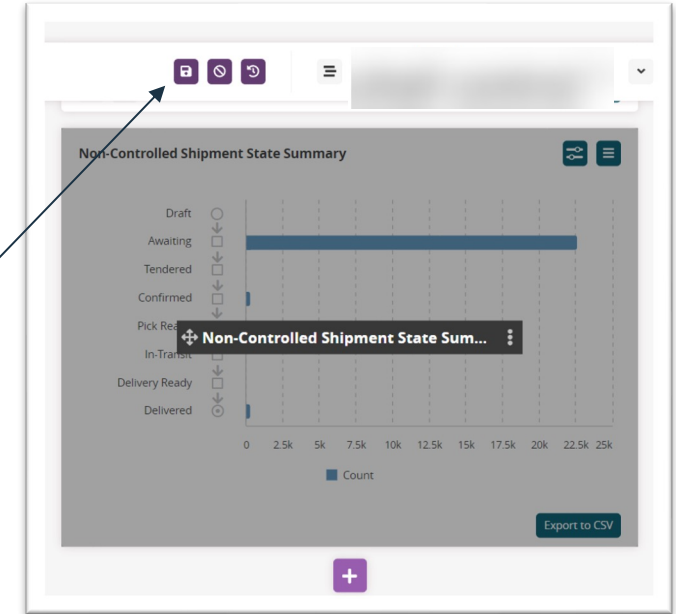
# Dashboard Personalization

Dashboard serves as home page for each user which can be customized by the user by adding and removing Portlets

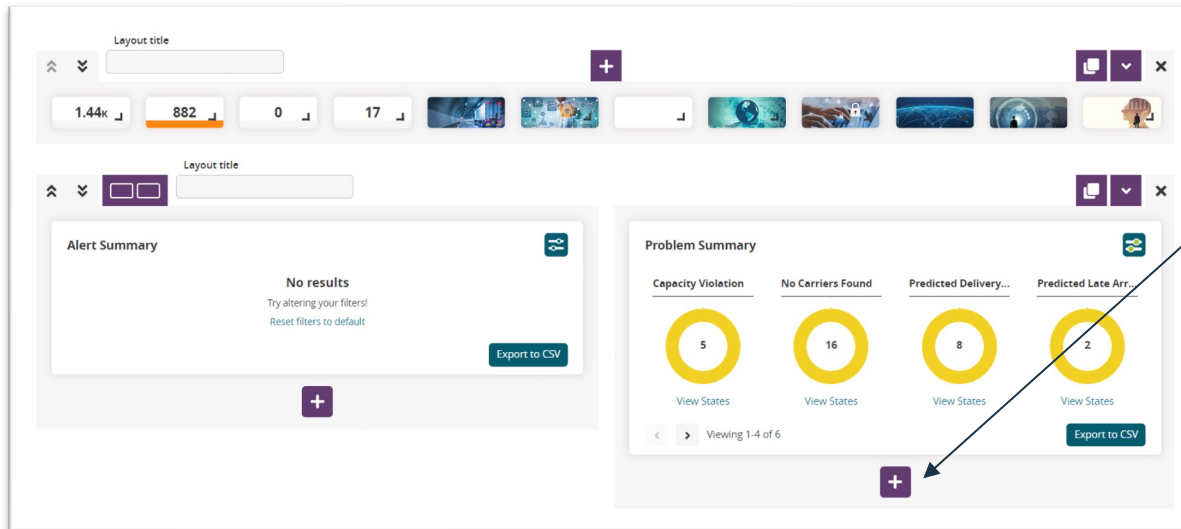
1. Click on the **Edit** icon at the upper right-hand corner to **add new widgets** to dashboard
2. Click the **Add** a widget button. The Add a Flexible Widget popup screen appears.
3. Select the widget and click on **Add Widget** button. The widget will appear on the dashboard
4. Click on the **Save Dashboard** button to save widget to the dashboard.



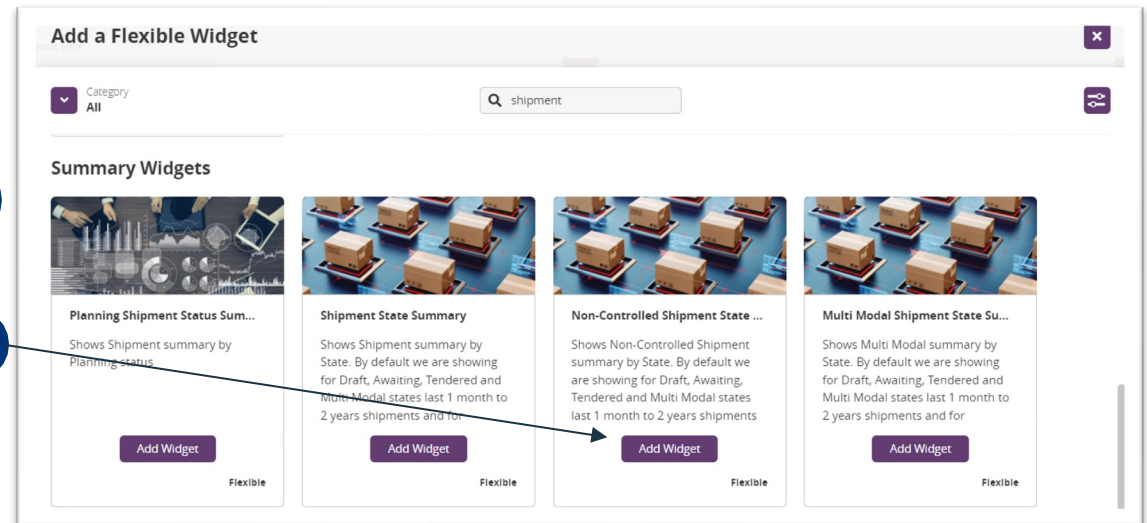
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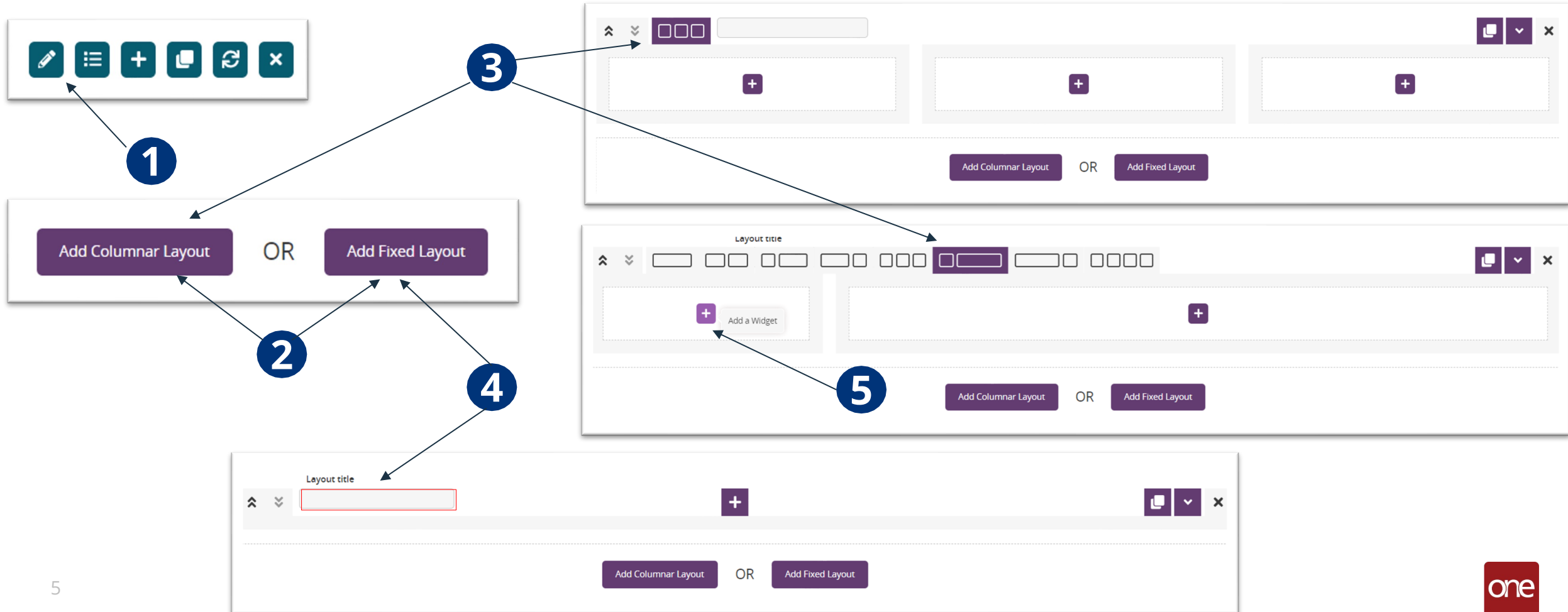
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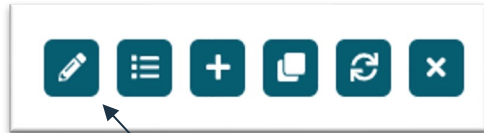
# Dashboard Layout Configuration

1. Click on the **Edit** icon at the upper right-hand corner for layout configuration.
2. Scroll to the bottom of the page and select either **Add Columnar Layout** or **Add Fixed Layout** as per your choice.
3. Click on the **Add Columnar Layout** icon and **select flexible layout** as per your requirement.
4. Click on the **Add Fixed Layout** icon and proceed with the given fixed layout.
5. Click on the **Add Widget** button to add a new widget in the dashboard.



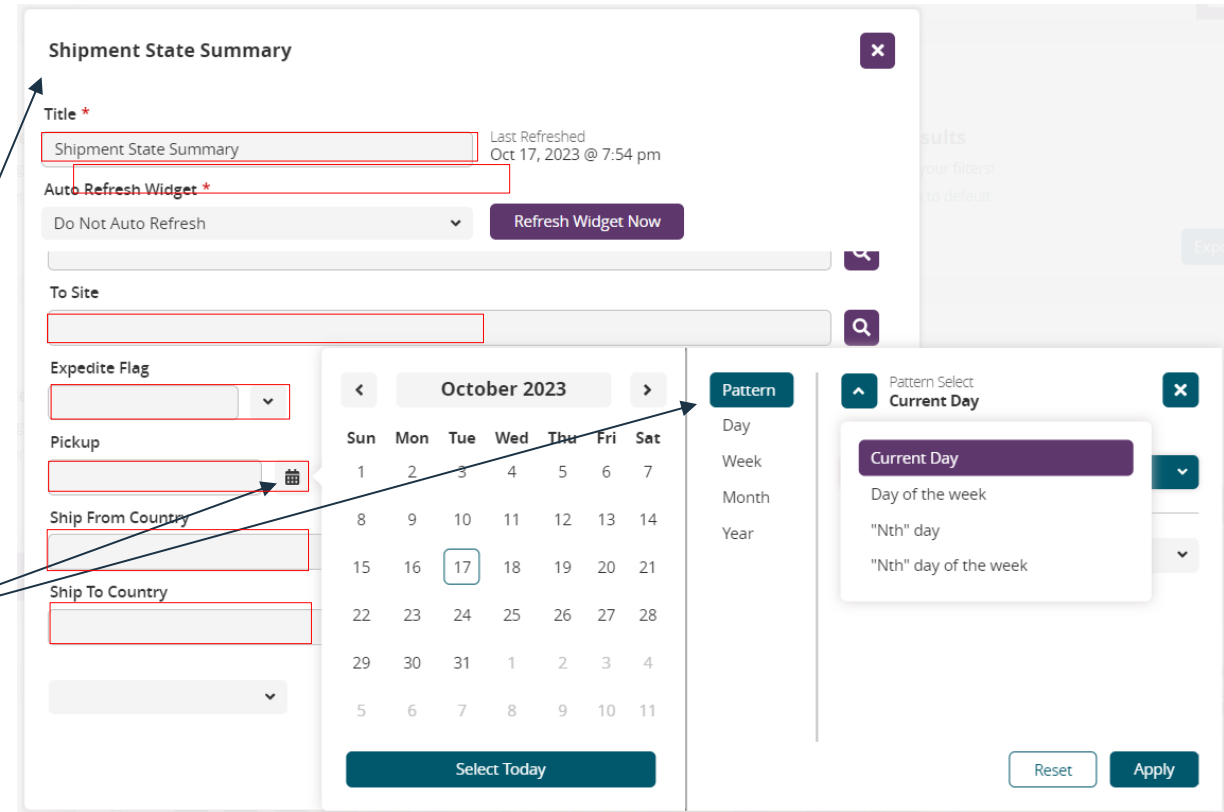
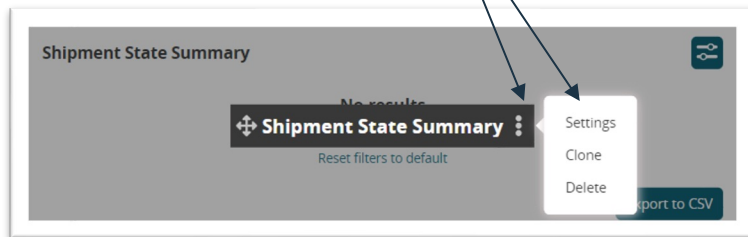
# Widget Setting and Saving

1. Click on the **Edit** icon at the upper right-hand corner for widget setting.
2. **Select** the **widget** for setting > Click on  > Select setting
3. **Modify** the parameters as applicable.
4. For any **Date parameter** you can use different pattern as per your choice.
5. **Save** the dashboard changes.
6. **Cancel** the dashboard changes.
7. **Revert** back to original.
8. **Close** the current perspective.



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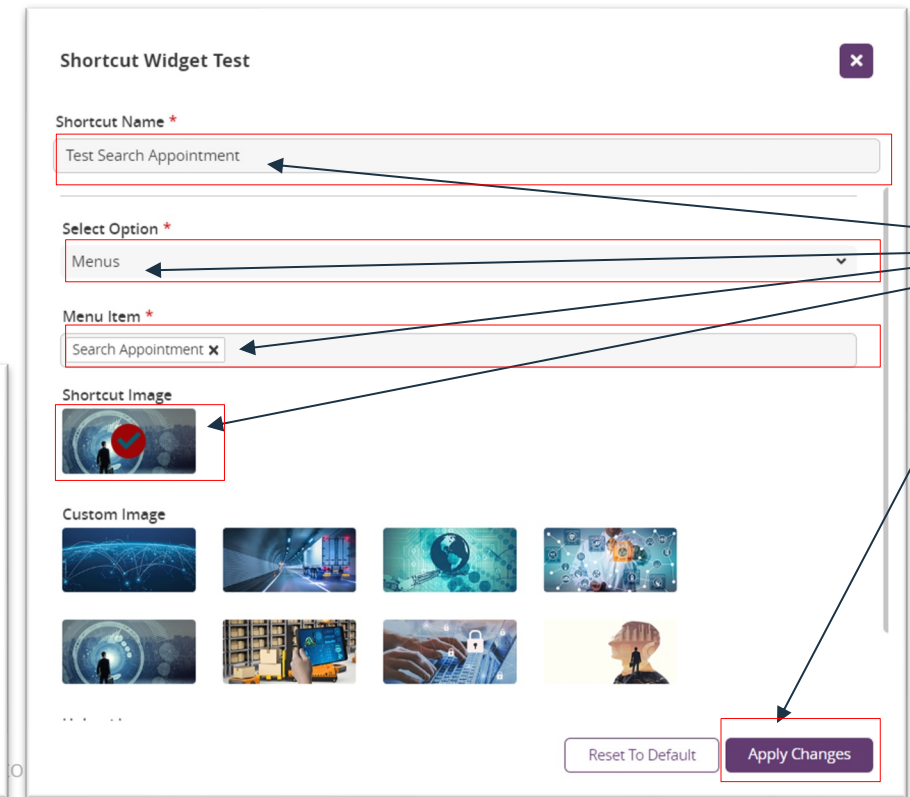
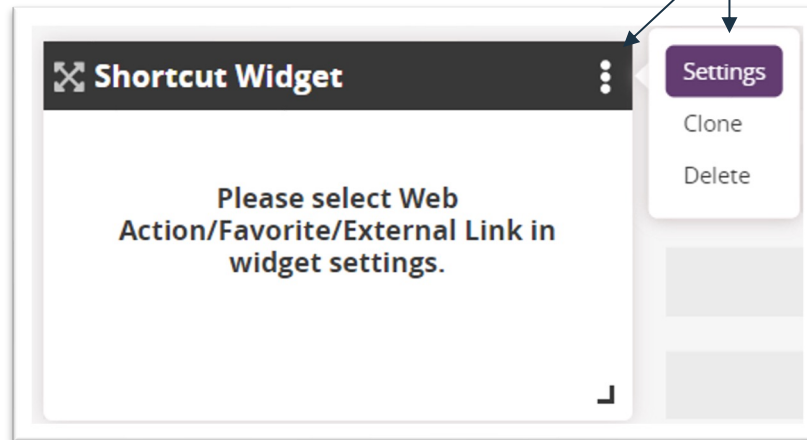
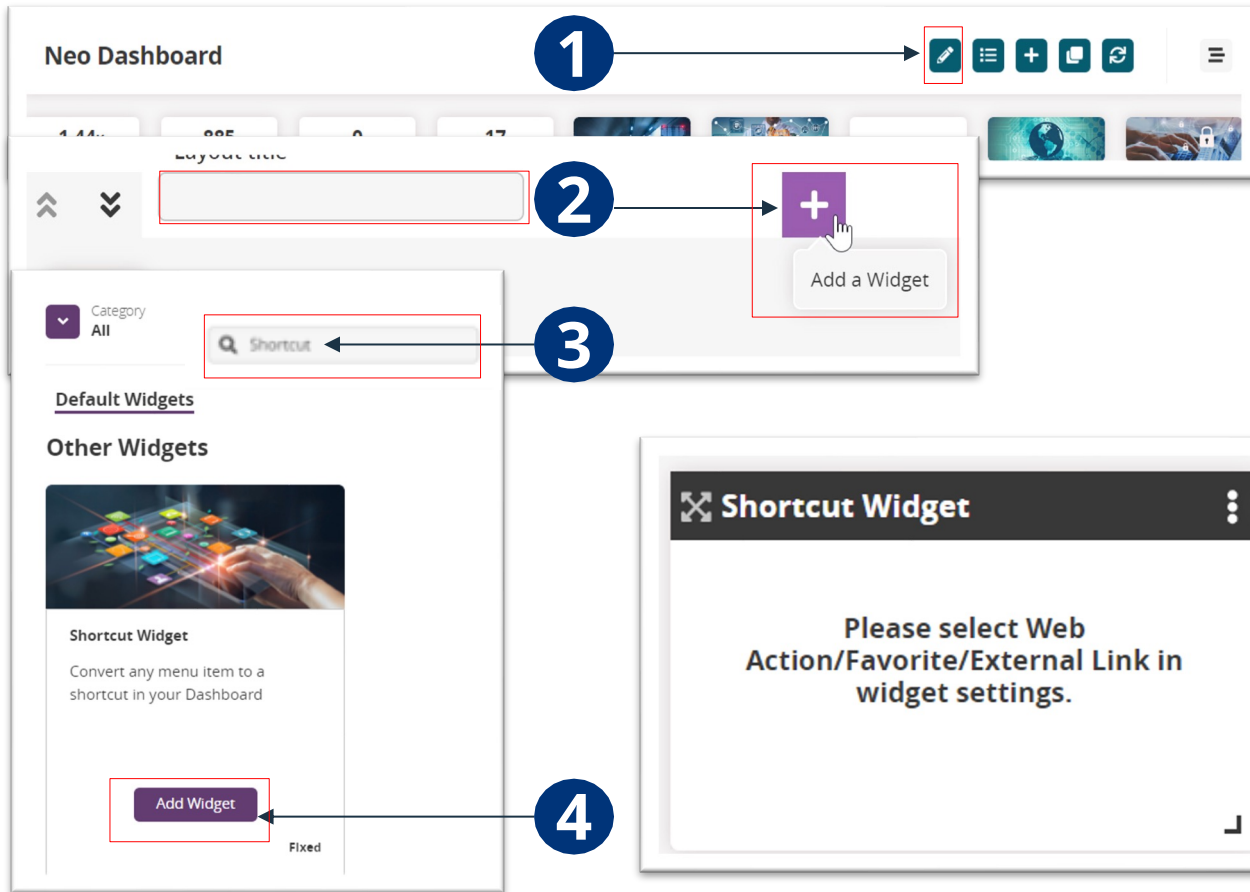
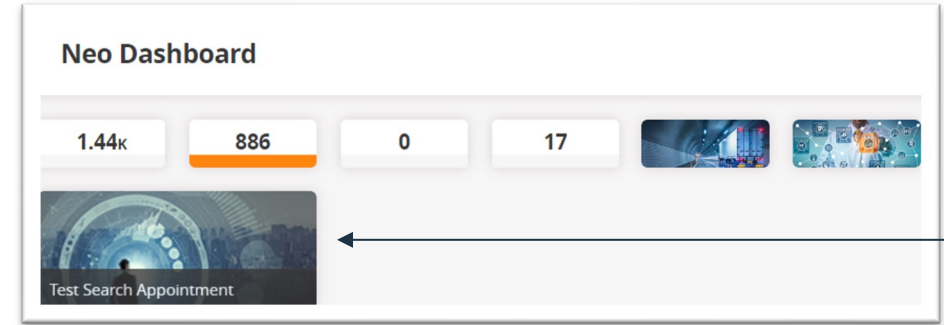
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# Creating a Shortcut Widget

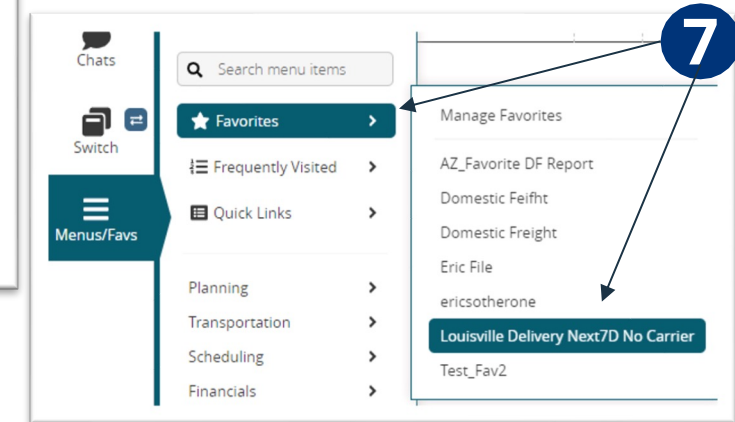
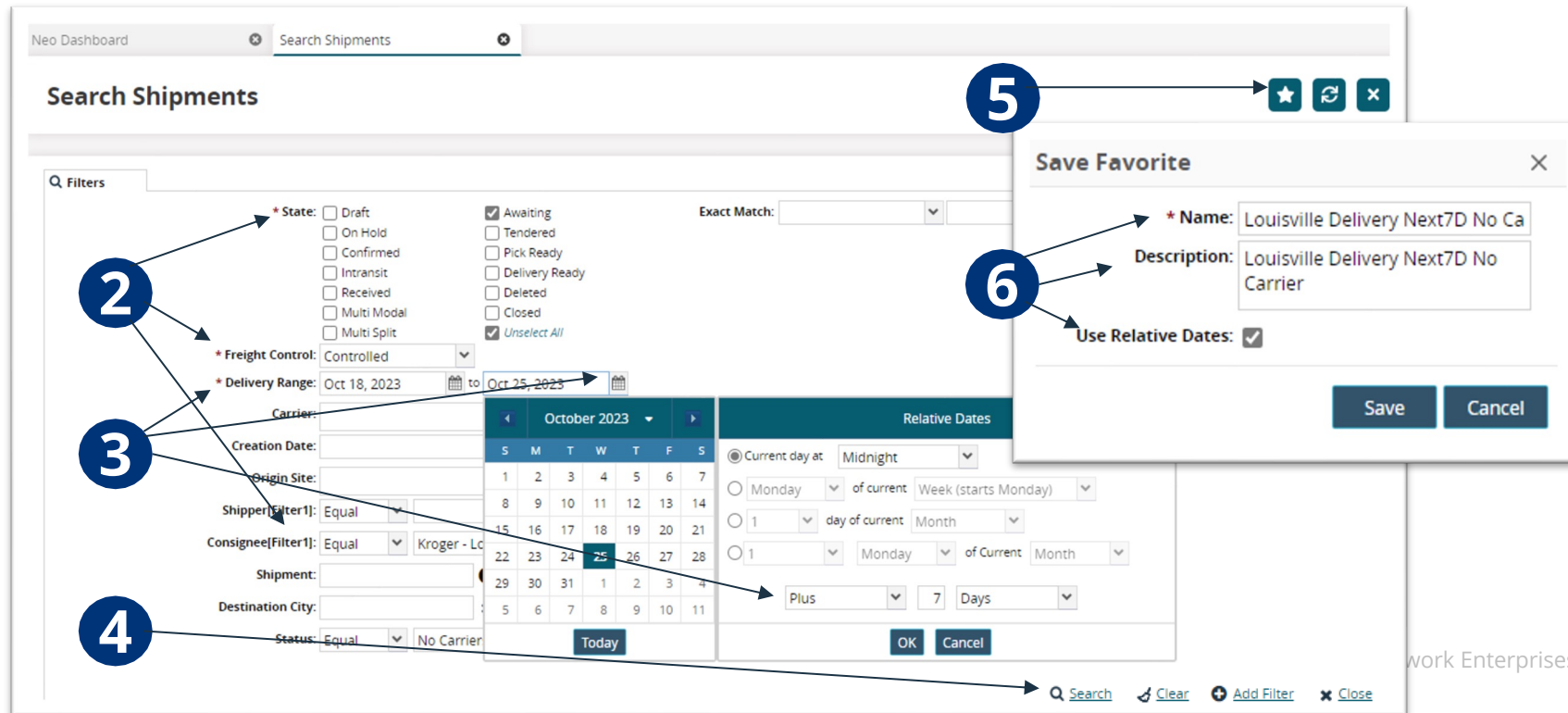
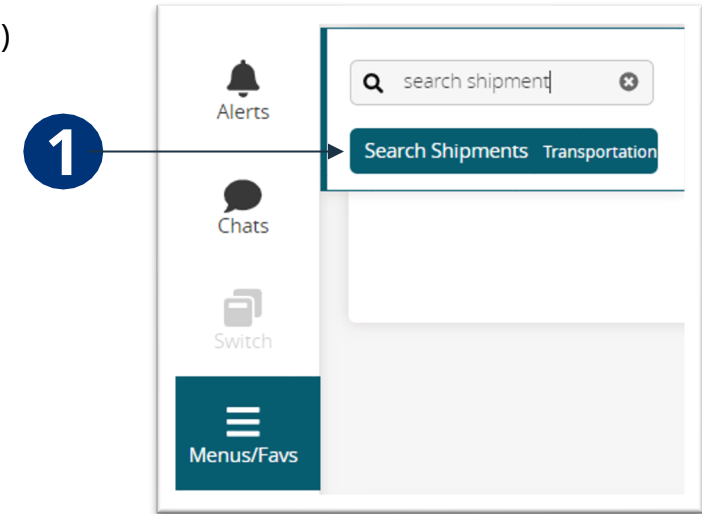
1. Click on **Edit** Dashboard
2. **Add** a Widget
3. Search **Shortcut**
4. Select **Add Widget**
5. Select **Settings** on the added Shortcut Widget
6. Provide a **Name** for your Shortcut, search and **Select** the **Menu** to which the Shortcut will be applied, **Select** Image and **Apply Changes**.
7. Finally, the **Shortcut** is **Available** in the **Dashboard**.



# Creating a Favorite

Creating a sample Favorite for Shipments deliverable in next 7D, Status is "No Carriers in Tender Plan " for a particular site.

1. Open **Search Shipments** report from Menu
2. Select the **State**(Awaiting), **Freight Control** (Controlled), **Consignee** (Add site), **Status**(No Carriers in Tender Plan)
3. **Delivery Date Range** – Use Pattern for dynamic population of date range from **Today to next 7D**.
4. Click on **Search** to display the report.
5. Click on **Save as Favorite** in the Report output.
6. Provide **Name**, **Description**, **check the relative date** for dynamic population of date range.
7. Finally, the **Favorite** will be available for your use.





# Thank You!