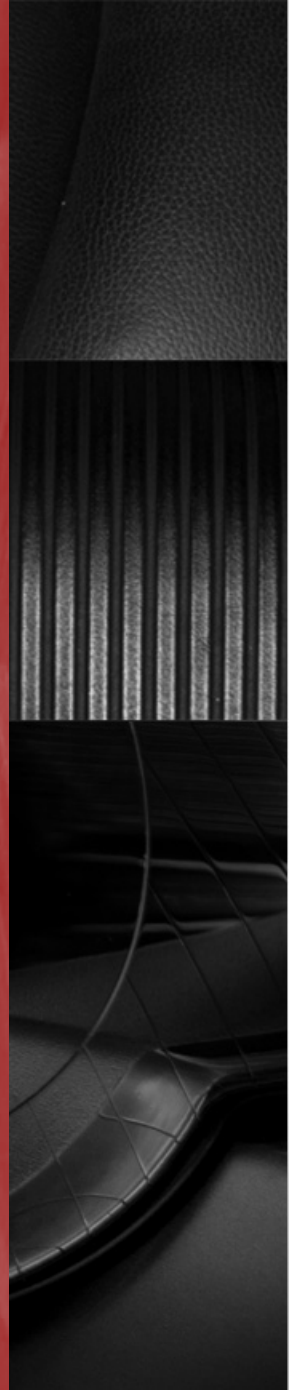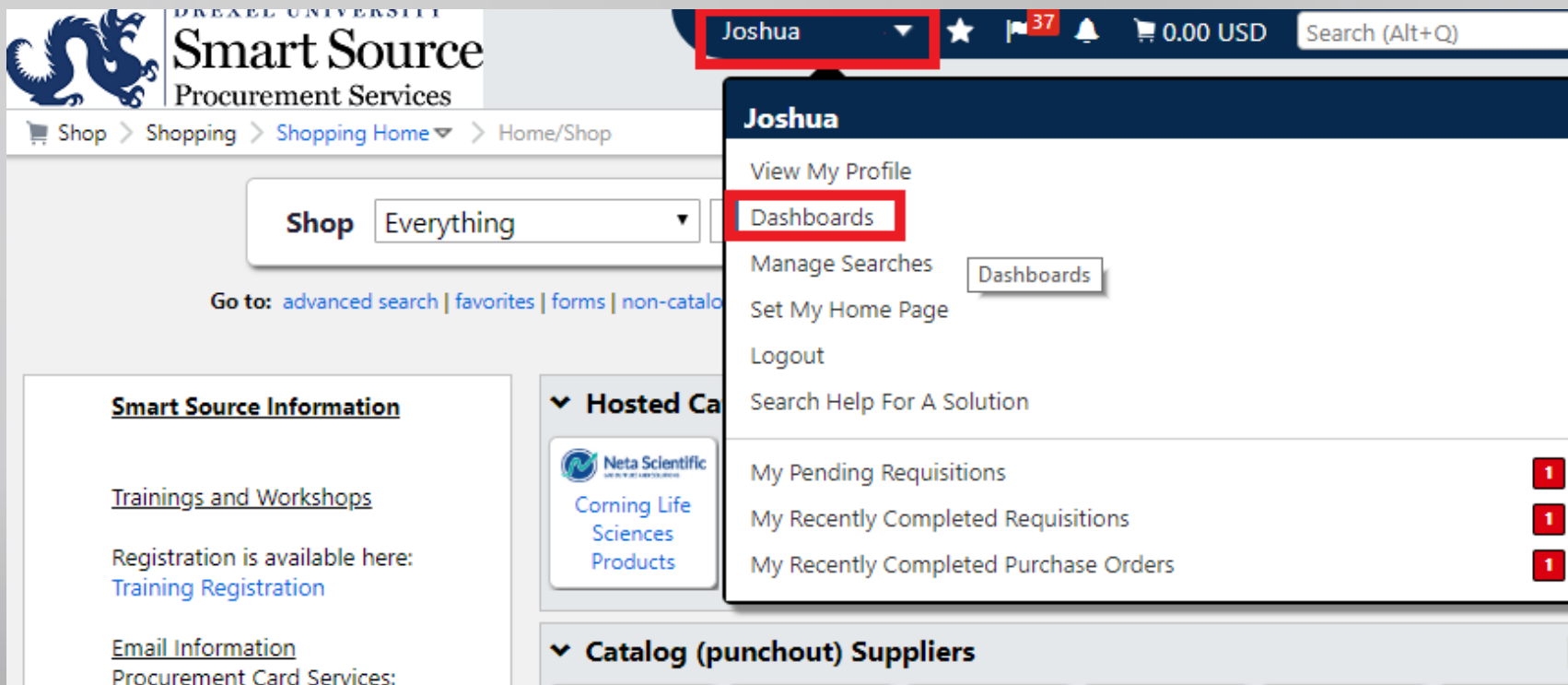# How to Create and Manage a Personal Dashboard

Procurement Services

Creating A Dashboard
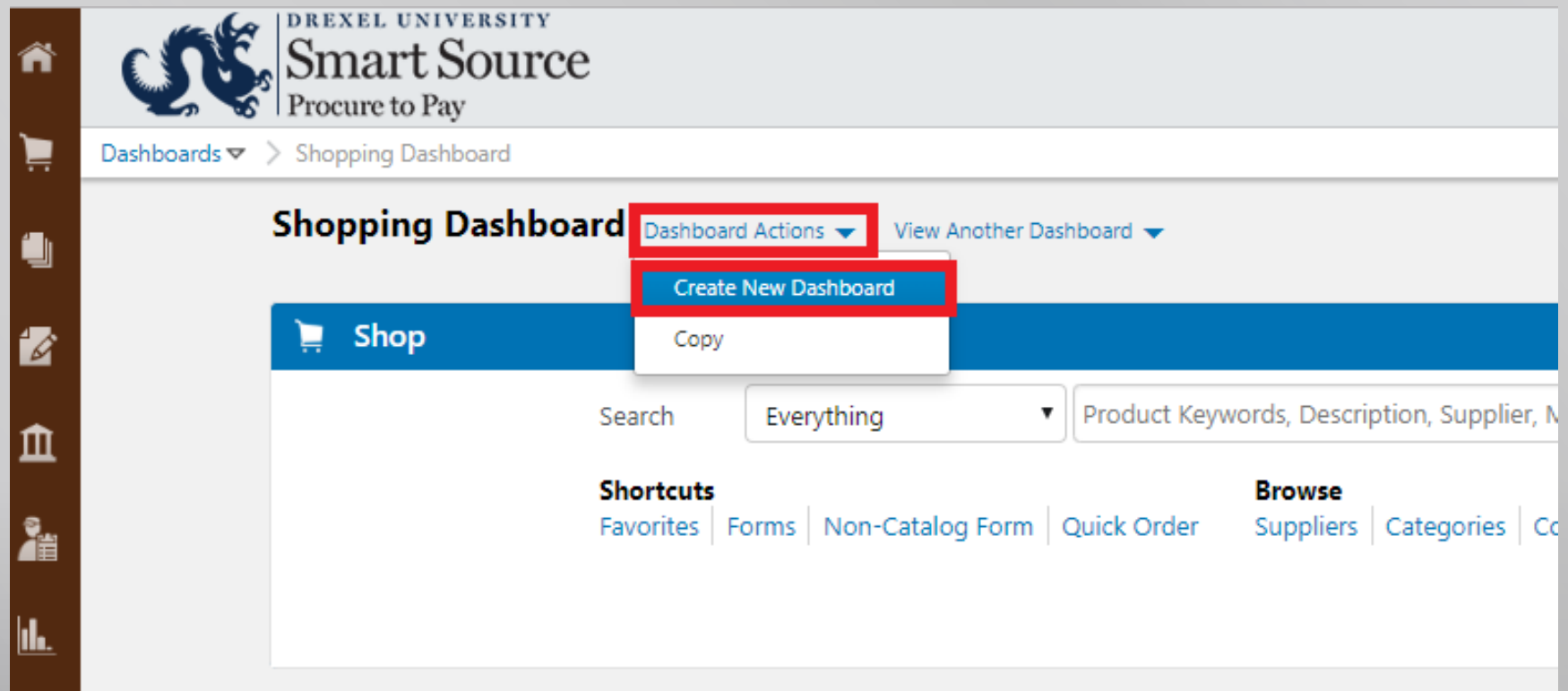
- Locate your User menu in the top-right banner. Click on your name and a window will appear, select "Dashboards"

Creating A Dashboard

- To create a new dashboard, click on "Dashboard Actions" and select "Create New Dashboard".

Creating A Dashboard

- A window will appear asking you to input a "Name", enter a meaningful name and click "Create".

- The Dashboard has been created and will appear blank. This is because no Widgets have been added to the dashboard being displayed.

Adding Widgets to a Dashboard

- To add a widget to a newly created Dashboard click on the "+ Add Widget" button.
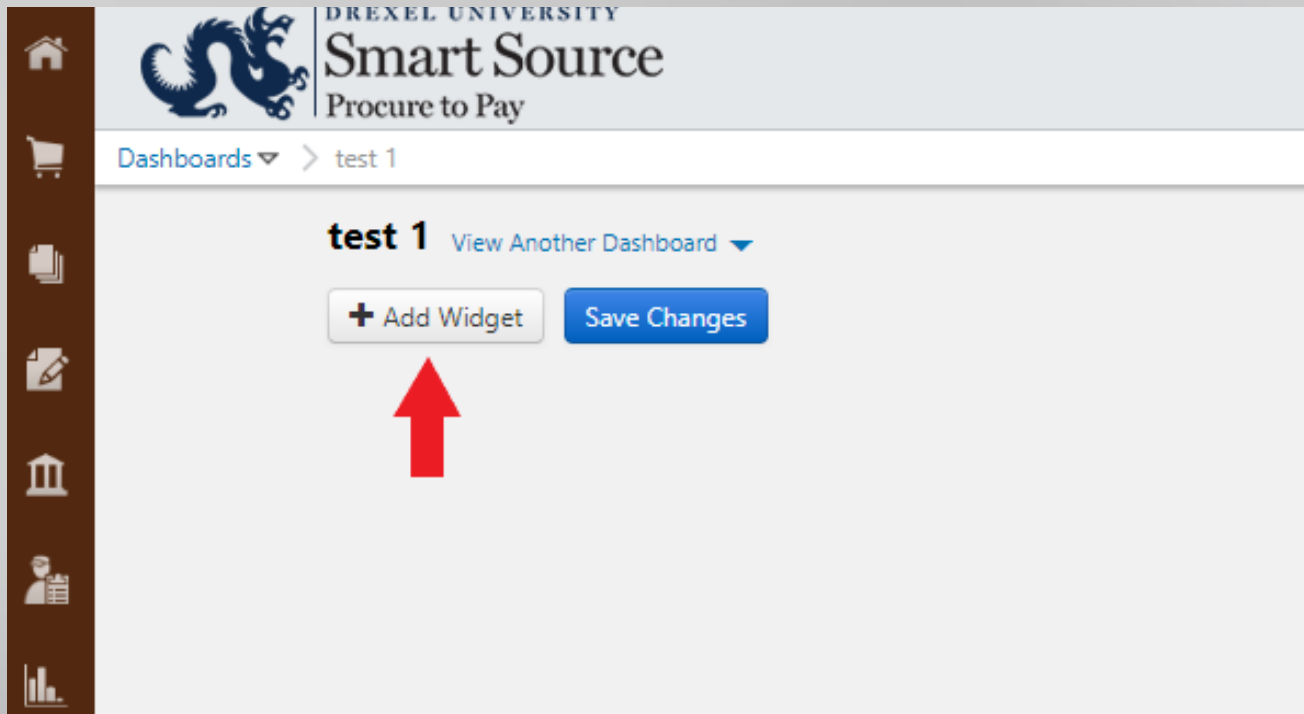
Adding Widgets to a Dashboard

- To add a widget to an already existing dashboard click on the "Dashboard Actions" and select "Edit" from the dropdown menu. Once the "+ Add Widget" button appears, click it. **NOTE:** This is not available for organizational dashboards
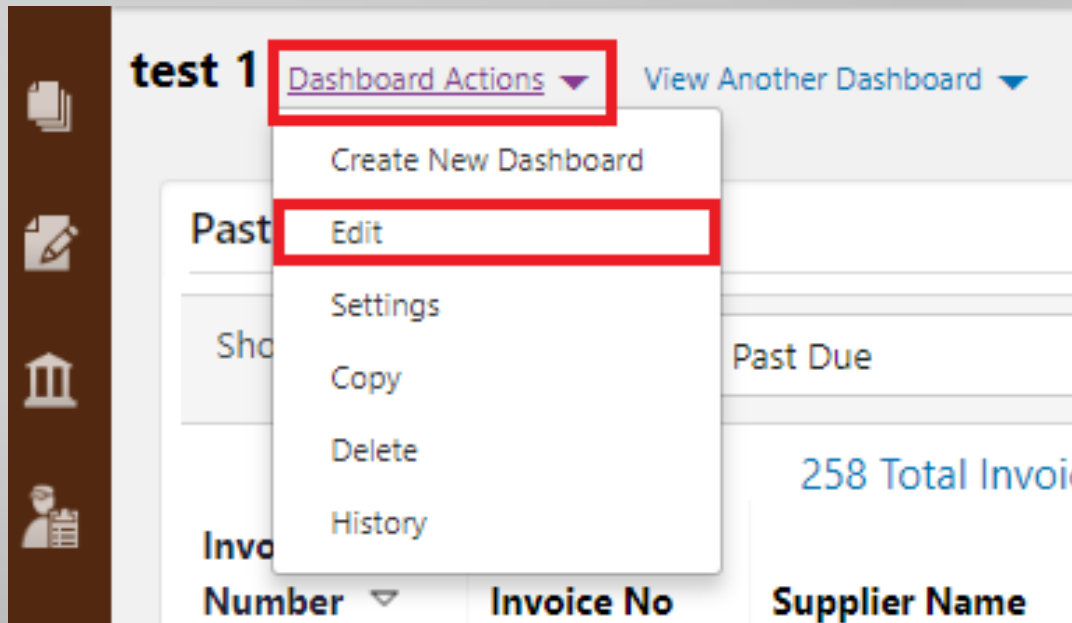
Adding Widgets to a Dashboard

- A window will appear that will list several Widget Types. Click the "Add…" button next to the Widget Type that is desired for the Dashboard. A dashboard can contain many different Widgets so be careful not to make that dashboard feel too "busy".
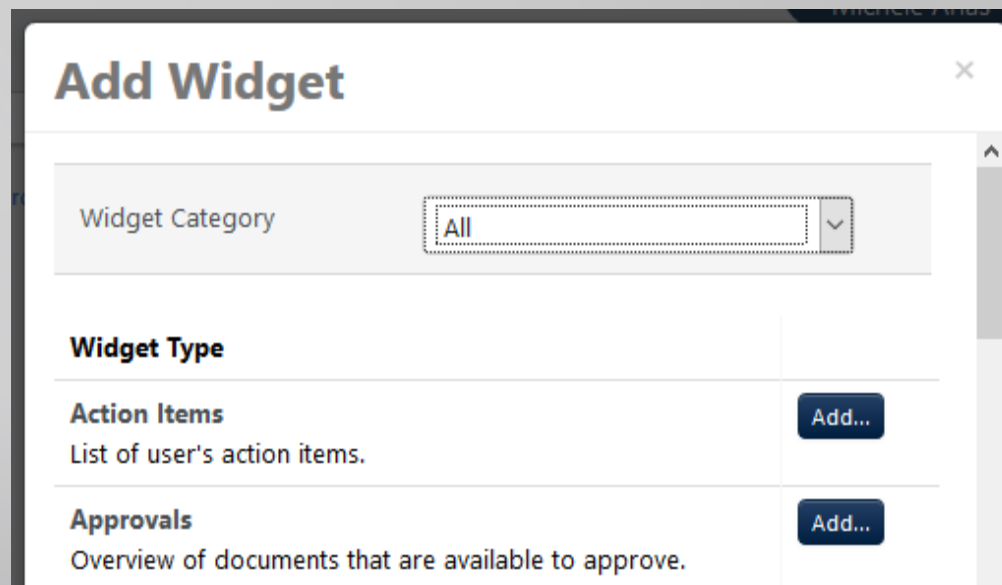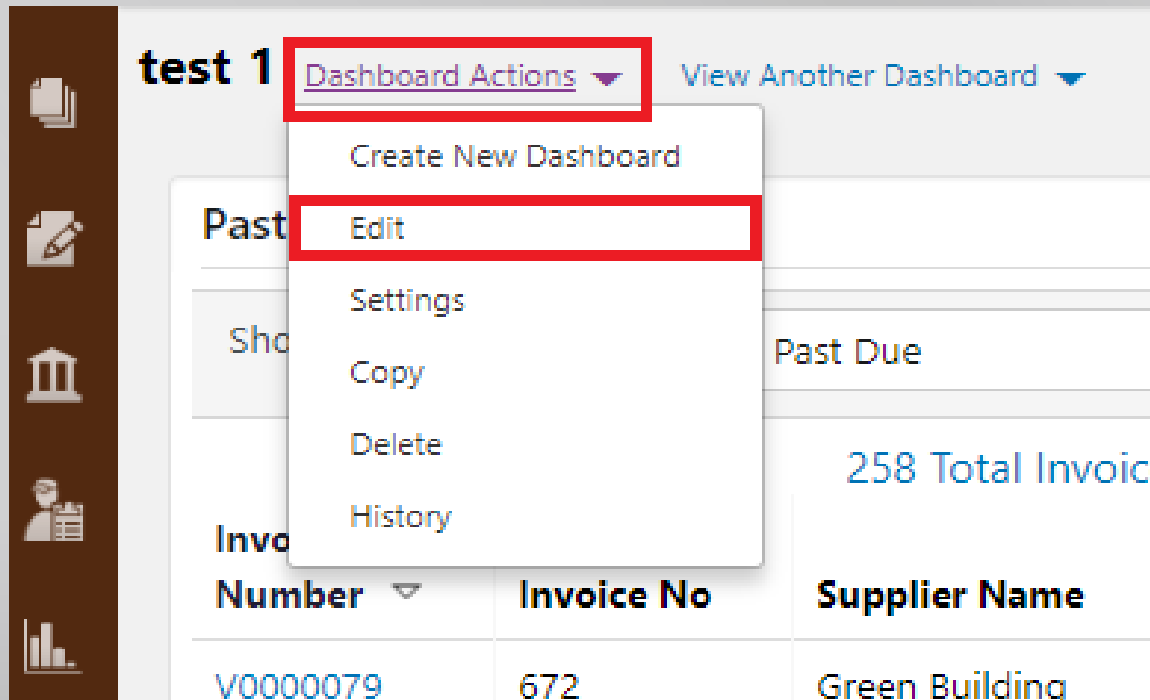
Adding Widgets to a Dashboard

- A list of the most helpful widgets can be found at the end of this document.

- Continue adding widgets until all desired Widgets have been added.

- Once done adding Widgets to the dashboard being displayed, select the "Save Changes" button at the top.
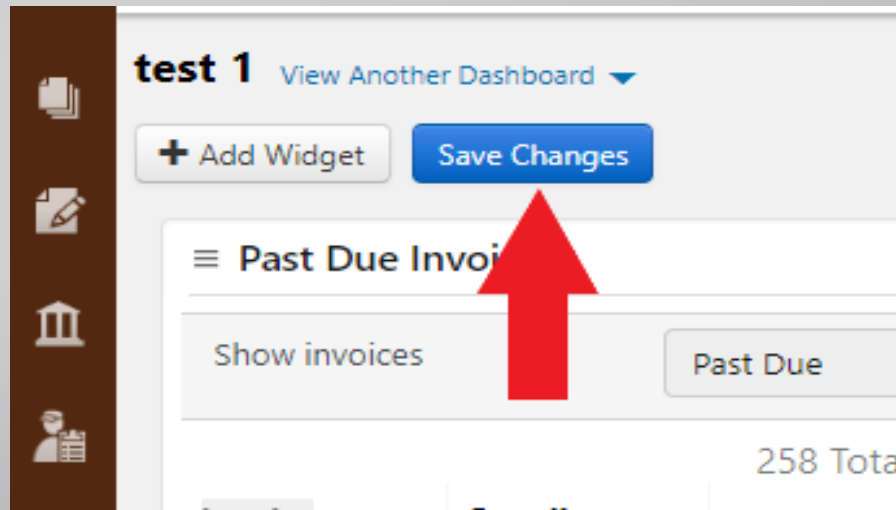
Viewing and Modifying Dashboards

- To remove a Widget from a dashboard, click on "Dashboard Actions" and then select "Edit"

Viewing and Modifying Dashboards

- All Widgets on the dashboard should have several icons at the upper right of the Widget. Select the TRASH CAN icon (🗑). Once all necessary Widgets have been removed click the "Save Changes" button.
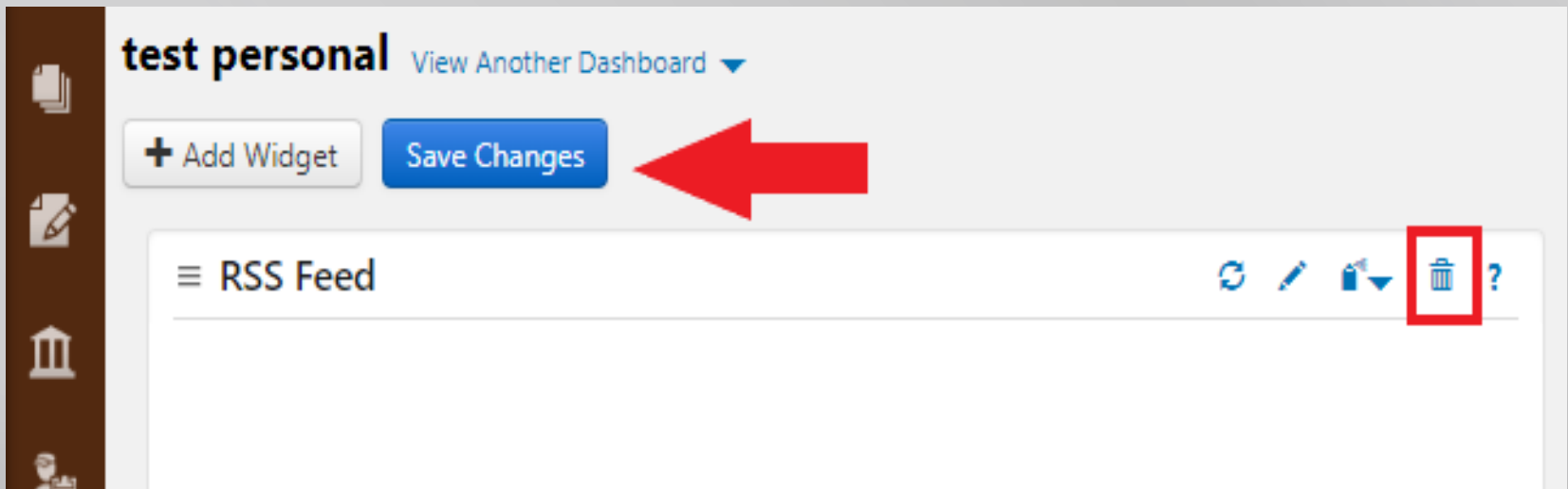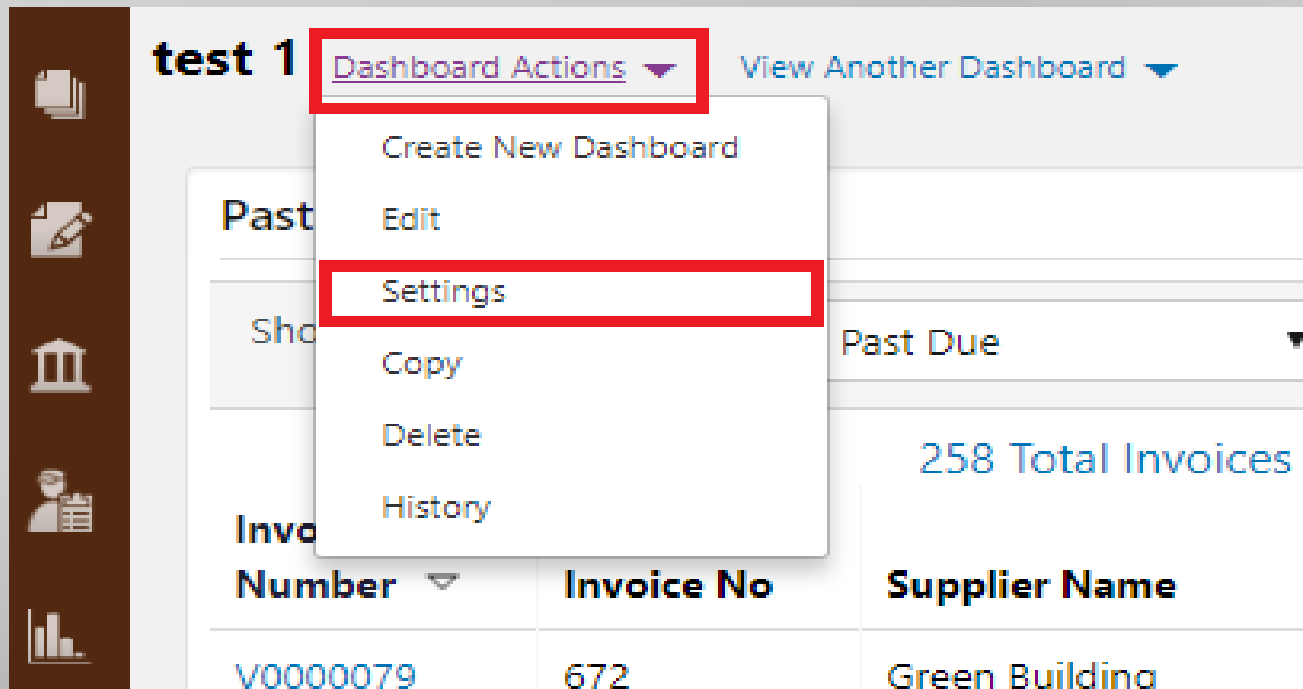
Viewing and Modifying Dashboards

- To view a different dashboard click "View Another Dashboard" and select the dashboard that is desired. **NOTE**: This field also displays any organizational dashboards that the user has access to.
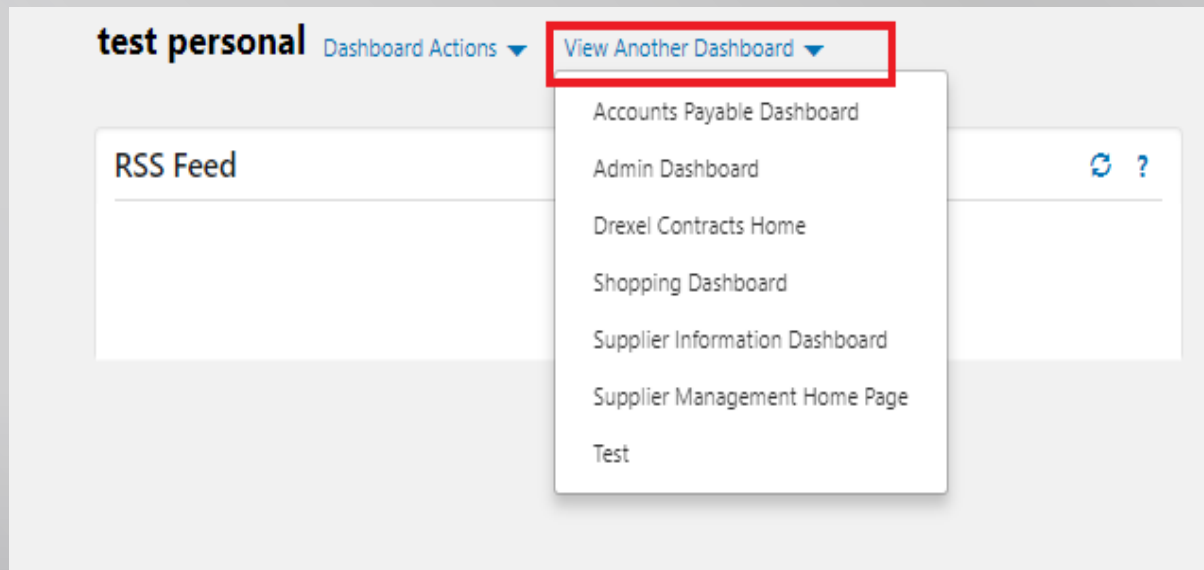
Viewing and Modifying Dashboards

- To edit the name of a personal Dashboard, click on "Dashboard Actions" and then select "Settings". **NOTE:** This is not available for organizational dashboards.

Viewing and Modifying Dashboards

- To delete the dashboard that is currently being displayed, click on "Dashboard Actions" and then select "Delete". **NOTE:** This is not available for organizational dashboards.
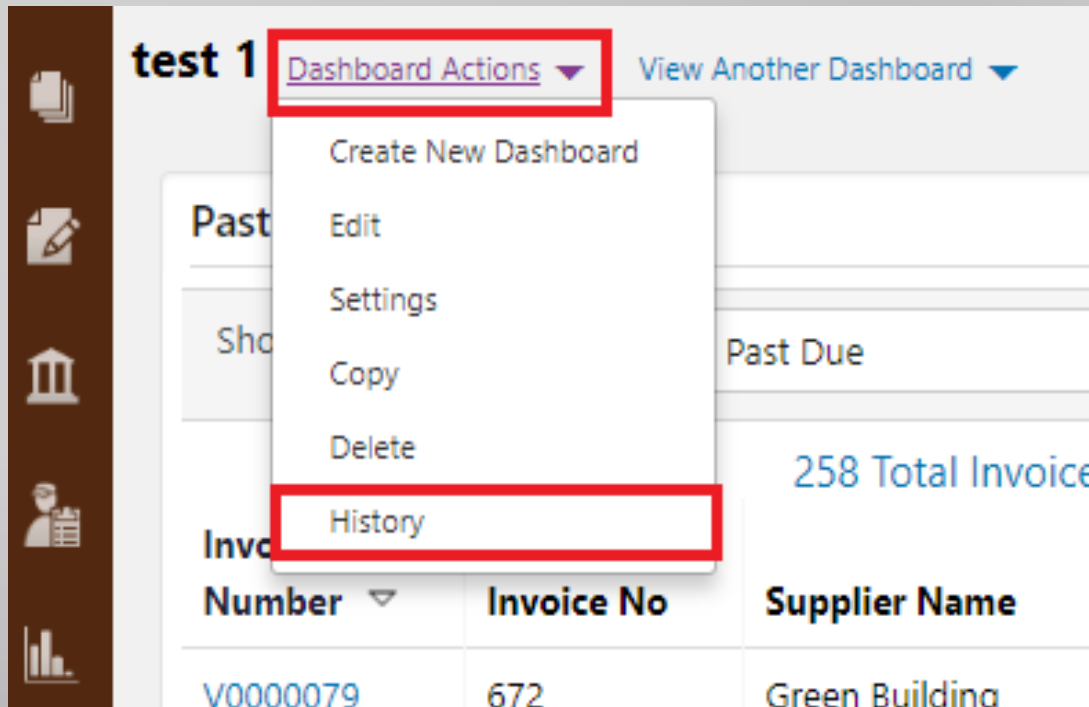
Viewing and Modifying Dashboards

- To copy the dashboard that is currently being displayed, click on "Dashboard Actions" and then select "Copy". The copy with display on the screen. When you copy an organizational dashboard, it is important to remember that the dashboard created for the copy is a PERSONAL DASHBOARD and not an organizational dashboard.
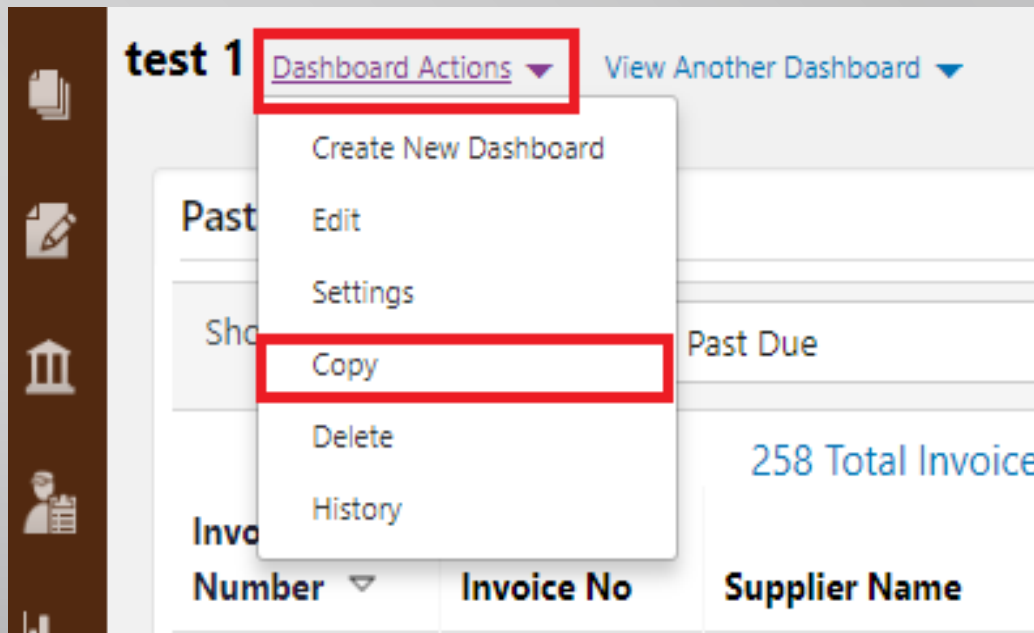
Viewing and Modifying Dashboards

- To view the history of the dashboard that is currently being displayed, click on "Dashboard Actions" and then select "History". **NOTE:** This is not available for organizational dashboards.

Useful Widgets Table

- Below is a table of the most useful widgets:

Widget	Description	Solution/Function
Action Items	This widget displays action items for the user who is viewing the dashboard.	General
Approvals	This widget displays an overview of documents that are available to approve.	General
Bookmarks	This widget displays the bookmarks for the user who is viewing the dashboard.	General
Document Search	This widget allows users to search for documents directly from the dashboard.	All Solutions
Draft Carts	This widget displays a list of the user's draft carts.	Shopping
Forms	This widget provides organizations and users the ability to display a customized list of forms and form requests on the dashboard.	Shopping

Useful Widgets Table

Widget	Description	Solution/Function
Free-Form Text	This widget provides informational text for the dashboard.	General
Invoice Summary	This widget displays a user's invoices from the last 90 days in a graph view or list view.	Accounts Payable
My Approvals	Displays pending approvals for the user who is viewing the dashboard.	General
My Resources	Displays a pre-configured email address and phone number for system support.	General
Organization Message	Displays the configured Organization Message to the user who is viewing the dashboard.	General
Past Due Invoices	This widget displays a list of past due invoices.	Accounts Payable
Printed Handbooks	Allows users with appropriate permissions to access the PDF end-user handbooks.	General

Useful Widgets Table

Widget	Description	Solution/Function
Product Search	This widget allows shoppers to do a product search from the dashboard.	Shopping
Purchase Order Summary	This widget displays the user's purchase orders from the last 90 days in a list view or a graph view.	Shopping
Quick Links	This widget displays a customizable list of links for easy access to both internal and external sites.	General
Requisition Summary	This widget displays the user's requisitions from the last 90 days in list or graph view.	Shopping
RSS Feed	This widget displays an RSS feed such as blogs, etc.	General
Saved Search: Documents	Provides access to a SHARED saved document search for organizational dashboards. Personal dashboard scan access shared or personal saved searches.	General

Useful Widgets Table

Widget	Description	Solution/Function
Saved Search: Suppliers	Provides access to a SHARED saved supplier search for organizational dashboards. Personal dashboards can access shared or personal saved searches.	Supplier Management
Showcases	This widget displays the shopping showcases to which a user has access.	Shopping
Solutions and Help Links	Allows users with appropriate permissions to access the various customer solutions available in the site.	General
Spend Summary	This widget displays a graph of your organization's spend over time.	General
Supplier Search	This widget allows users to search for suppliers directly from the dashboard.	Supplier Management