

Dashboards

The dashboard is the first window displayed when you navigate to a module. You can customize the dashboard by adding reports from the [Manage Reports](#) window. Each module can have its own dashboard, and you can create and save multiple dashboards (from which you select the desired dashboard for a particular module). You can also share your dashboard with your entire agency or with only certain employees that are identified either directly, by security role, or by administrative unit.

Add reports to a dashboard through the Edit Dashboards dialog box, which is launched from either the [The Dashboards Window](#), or add them through the dashboard using the **Edit Dashboard** command (see below).

Once a report appears on the dashboard, you can re-size the report window by dragging an edge of the window. You can also drag the entire window to a new position. Finally, when you double-click the title bar of a report, the system enlarges the window of the report to fill the entire dashboard. If you double-click the title bar again, the system will restore the window to its original size.

When you right-click a dashboard, the system displays a shortcut menu. This menu contains the common commands along with the following special commands::

- **Delete Report:** This command deletes the report from the dashboard (but not from the Reports Management window).
- **Edit Dashboard:** This command displays the Edit Dashboard dialog box. The left side of this dialog box lists all available reports and the right side of the dialog box shows only those reports on the dashboard currently displayed. You can use this dialog box to accomplish the following:
 - In the left pane, you can right-click a report not currently on the dashboard and then click Add to Dashboard to place the report on the dashboard. If the report requires arguments, the system will display a dialog box so you can enter the arguments. Once you have entered the arguments, or for those reports that do not require arguments, the system displays the selected report in the right pane.
 - For currently displayed dashboard reports that require arguments, you can right-click the dashboard report in the right pane and then click Edit Arguments to display a dialog box that allows you to modify the report's arguments. Note: To modify a dashboard report in more substantial ways (such as adding or removing columns), you will need to use the Setup Report command or edit the report in the Reports Management window.
 - You can right-click the dashboard report in the right pane and then click Remove from Dashboard to cease displaying the report on the dashboard. (You could also do this more simply by using the Delete Report command directly in the dashboard.) Even though the report is removed from the dashboard, it still exists in the Reports Management window.
 - You can use the up and down arrows on the far right of the dialog box to change the display order of the reports on the dashboard. The first report listed in the right pane appears in the upper left corner of the dashboard. The remaining reports are displayed in a left-to-right, top-to-bottom order. (You can also accomplish this directly in the dashboard by dragging the reports to new positions.)

Note: Once you modify a dashboard by adding or deleting reports, you can either save the dashboard by clicking the Save button or save the changes in a new dashboard by clicking the Save as New button. When you click the Save as New button, the system saves the new dashboard under a default name in the Dashboards window and then displays the new dashboard.

- **Refresh Report:** This command causes the system to regenerate the report with the latest data.
- **Remove Dashboard:** This command deletes the dashboard, leaving the Home window blank. It does not, however, delete the dashboard from the Dashboards window.
- **Select Dashboard:** This command displays a dialog box from which you can select the dashboard you wish to display.
- **Setup Report:** This command is only available for reports that you created. When available, it displays the configuration dialog box for the type of report selected. This report is the same as found via the [Reports Management](#) window. You can then edit the report as desired and save the report.
- **Use Default Dashboard:** When a dashboard is configured for the security role you selected when you logged on and that dashboard is not currently displayed, this command becomes available and will display that dashboard.