USER GUIDE

Customize User Dashboard

Basic User Guide

DUNK & ASSOCIATES
SYSTEMS 24-7

Your **Dashboard** is the page you see when you first log in, and can be accessed at any time by clicking the **Dashboard** icon in the navigation menu. It is designed to show you a complete overview of where you stand within your program.

Your dashboard is set up and controlled by your company administrator. However, your company administrator may allow you the ability to modify your dashboard. This can include removing or reordering the widgets on your dashboard, or adding and managing your own custom widgets. Modifying your dashboard is done through your **Profile.**

To access your profile, select the **Profile** button located in the top right-hand side of your screen.

My Profile

Change your settings using the options below.

Email Address:	
Phone Number:	
Language Setting: *	English ▼
Username:	johndoe247
Password:	
New Password:	👁
Confirm New Password:	👁
Autoplay Voiceovers:	○ Off ○ On
Time Zone:	(UTC-05:00) Eastern Time (US & Canada) ▼

To change your password, enter your current password in the field above and your new password in both fields below. To maintain the current password, leave the three fields empty.

Passwords must include 1 uppercase, 1 lower case, a number and a 5 character length minimum.

Modify Dashboard

Once in your profile, click the **Modify Dashboard** button to see the options for modifying your dashboard.

Modify Dashboard

Customize Dashboard

Use this function to manage and customize the widgets that the employeel has access to seeing on their dashboard.

Organize Dashboard

Use this function to organize and position the widgets displayed on the dashboard for the employee.

Add Widget

Add Widget

Manage Widget

Manage Widget

The **Customize Dashboard** option allows you to turn widgets on or off on your dashboard. The **Organize Dashboard** option allows you to move widgets around on your dashboard. The **Add Widget** option allows you to add a custom widget that you can place on your dashboard. The **Manage Widget** option allows you to edit, deactivate, or delete custom widgets that you have added.

Add Widget

To add a new custom widget, start by clicking on the **Add Widget** tool. Select the type of widget you wish to add. A variety of widget types are available, such as an image banner, social media feeds or a video. In this example, we will add an image banner to the Dashboard.

Always provide widgets with a specific name. For example, "Main Top Image Banner". This way, if you have multiple widgets, you will know which one it is when you later edit it.

Widget Type: Banner

Widget Name: *   en | fr

Widget Description: en | fr

Banner Image *   en | fr
                      Browse...

Widget Size: *   1x1

Status   ● Active ○ Inactive

In the **Banner Image** field, click the **Browse** button and choose the image that you wish to add as a banner to your Dashboard. You may need to resize your image to fit the widget size that you intend to use, or select an appropriate widget size based on the image that you have. (Please see the next paragraph for an explanation of the widget sizes and their relation to the Dashboard.)
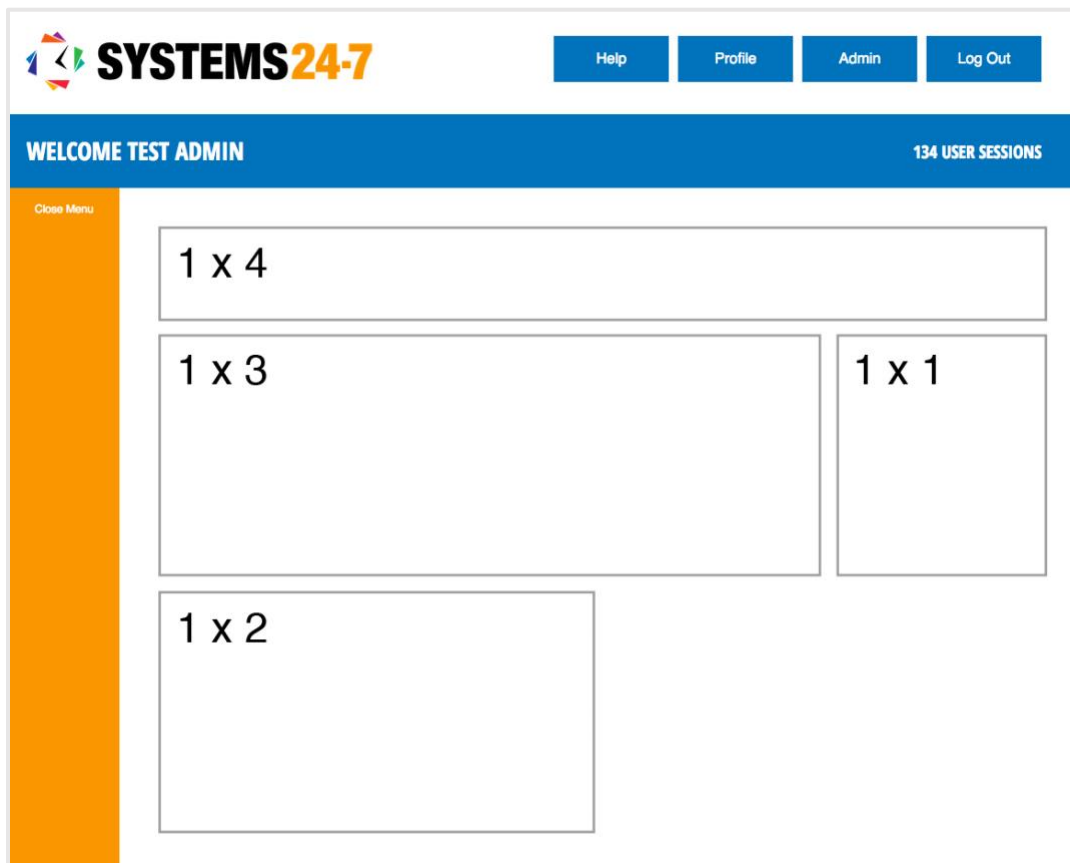
Recommended Banner Sizes

1x1	410px x 455px
1x2	835px x 455px
1x3	1265px x 455px
1x4	1685px x 175px

In the **Widget Size** field, select a size for your widget. The dashboard is created based on a grid system. The dashboard is 4 blocks wide by an infinite number of blocks tall. If you want to create a widget which only takes up one square of your dashboard, select the size as 1x1. If you want to create a widget that takes up two squares of your dashboard (or half), select the size as 1x2. If you want to create a dashboard that takes up one third of the space, select the size as 1x3. If you want to create a widget that takes up four squares of your dashboard (or the entire length), select the size as 1x4.

Please see the image on the next page for examples of widget sizes.

Examples:

Once you are finished, click **Add Dashboard Widget** to create the widget. This adds the widget to your bank of available widgets. Once you have added a widget, you will need to turn it on through the **Customize Dashboard** option. For instructions, please see the appropriate section below.

Manage Widget

If you need to make any updates to any of your widgets, click **Manage Widget** from the Dashboard Administration section. Here you will see a list of your available widgets:
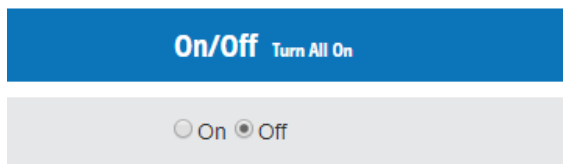
Manage Widget

Status: All ▼

Widget Name	Widget Type	Widget Size	Status	Authoring Options
Banner	Banner	1x2	Active	🖊 🔵 ⊗
Holiday Banner	Banner	1x4	Active	🖊 🔵 ⊗
Event Scheduler	Custom Calendar Type	1x2	Active	🖊 🔵 ⊗
Facebook	Facebook	1x1	Active	🖊 🔵 ⊗
Instagram	Instagram	1x1	Active	🖊 🔵 ⊗

To edit any of these widgets, click on the Edit button to the far right, under Authoring Options. Make any necessary updates, then click on **Update Dashboard Widget** to save your changes.

You can also activate/deactivate widgets by clicking the Status button, or delete widgets by clicking the Delete button.

Customize Dashboard

The **Customize Dashboard** option will allow you to turn on or off individual widgets or widget types on your dashboard, if your company administrator has allowed you to do so. Please note that your company administrator has the ability to restrict the widgets that you are allowed to turn on or off. If you try to turn a locked widget on or off, the system will inform you that the widget has been locked down by your company administrator.

On/Off Turn All On

○ On ◉ Off

To turn widget types or individual widgets on or off, select **On** or **Off** in the **On/Off** column next to the corresponding widget type or individual widget. You can also click the **Turn All On** button at the top of this column to turn on all widgets at once. If all widgets are turned on, this will be replaced with a **Turn All Off** button, which turns off all widget types when clicked.

When you are finished, make sure to click the **Save** button at the bottom of the page to save your changes.

Organize Dashboard

The **Organize Dashboard** option will allow you to move widgets around on your dashboard, if your company administrator has allowed you to do so. Please note that your company administrator has the ability to restrict the widgets that you are able to move on your dashboard. If you try to move a locked widget, the system will inform you that the widget is not movable.

Organize Dashboard

Please select who's dashboard you'd like to organize:
● Company ○ Company Level ○ Permission Type ○ User

To move a widget on your dashboard, click and hold the widget, then drag and drop it to its new location.

When you are finished organizing your Dashboard, click **Save** in the bottom right. You will notice a confirmation to show you that the settings have been saved successfully.