How to Customise the Views Dashboard

The Views home screen can be customised, enabling you to see useful information as soon as you log into the system. After creating a personal dashboard, you can add different types of data to this in the form of widgets. Depending on your account configuration, various widget types will be available:
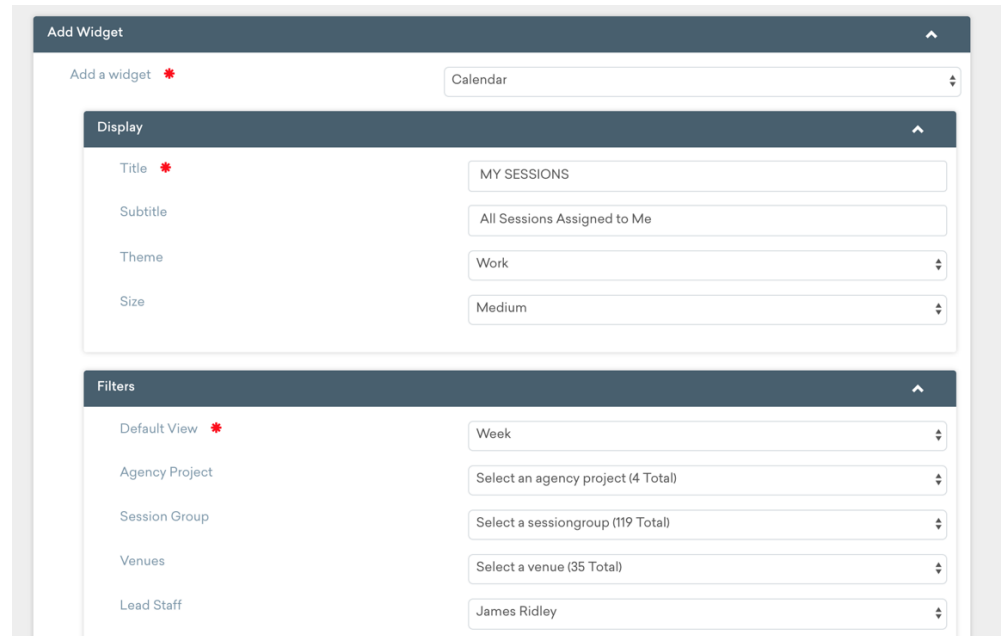
- Alerts
- Calendars
- Favourites
- Latest records
- Statistics
- Tasks

To create a new dashboard:

- From the home screen, select **Customise Dashboard** from the menu on the left-hand side

- Click on the **Plus** icon **+**

- Enter a **Dashboard Title** and click **Next**

To add widgets to the dashboard:

- Select a widget type in the **Add A Widget** field

- Various fields will be displayed, where you can define the display for the widget:

- Complete the fields and click **Add**

You can repeat this process to add further widgets. Click **Preview** at any time to see how the dashboard will look. After the relevant widgets have been created, select **Return to Views** from the menu on the left-hand side.

The new dashboard will be displayed and will become the default home screen for your user login. Should you wish to view the original dashboard, click on **Classic Dashboard** from the menu on the left-hand side.

The process above can be repeated to created additional dashboards if required.

How to Share a Views Dashboard

After creating a dashboard, you can make this available to other users of your account. To do this:

- From the home screen, select **Customise Dashboard** from the menu on the left-hand side

- Click on the **Manage access** icon to open the access window

- In the **Dashboard owners** menu, select the users that should have ownership privileges. These users can manage access to the dashboard and have the ability to delete it

- In the **Share dashboard with** menu, select whether the dashboard should be available to **All users** or to specific **Users** or **User Groups**. If **Users** or **User Groups** is selected, a menu will open where you can select the relevant people or groups

- In the **Enable editing** menu, select **Yes** if users that can access the dashboard should also be able to edit it

- Click **Submit** to save changes