


## 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:

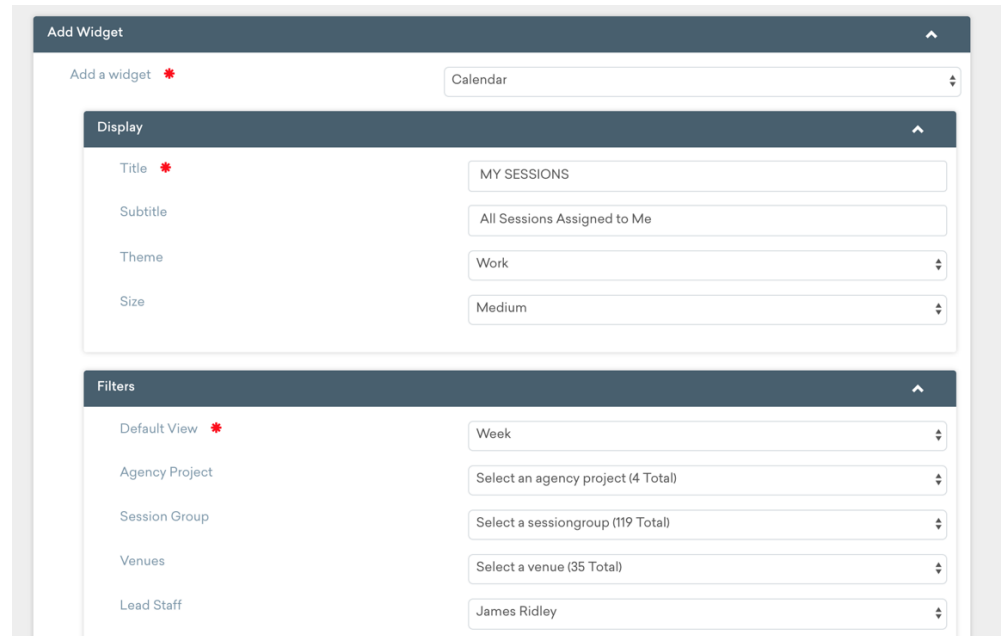
- Alerts
- Calendars
- Favourites
- Latest records
- Statistics
- Tasks

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:



The screenshot shows the 'Add Widget' configuration interface. At the top, there is a dark blue header with the text 'Add Widget' and an upward arrow. Below this, the main configuration area is divided into three sections: 'Add a widget', 'Display', and 'Filters'. The 'Add a widget' section contains a dropdown menu with 'Calendar' selected. The 'Display' section includes fields for 'Title' (MY SESSIONS), 'Subtitle' (All Sessions Assigned to Me), 'Theme' (Work), and 'Size' (Medium). The 'Filters' section includes dropdown menus for 'Default View' (Week), 'Agency Project' (Select an agency project (4 Total)), 'Session Group' (Select a sessiongroup (119 Total)), 'Venues' (Select a venue (35 Total)), and 'Lead Staff' (James Ridley).

- 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 create 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 

Manage access ✕

**Manage Access**

Dashboard owners *	<input type="checkbox"/> andy.chances <input checked="" type="checkbox"/> andy.christian <input type="checkbox"/> chances.template <input type="checkbox"/> mihai.ciobanu.transit
Share dashboard with	None <span>▾</span>
Enable editing	No <span>▾</span>

Submit Close



- 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