Personalise Dashboard



This is a guide for personalising your dashboard (the front page in WorkZone)

Instruction	Explanation	Navigation
Start changing your dashboard	If you want to change the standard settings, go to Home tab.	Home
	Click on the wrench icon Personalize on the navigation pane, and the <i>Dashboard</i> configuration window opens.	Personalize
Drag and drop	To change the position of the lists on the dashboard, drag them to the desired position. To change the size of every window	
	(widget), pull the corners of it.	
Get list	If you want to insert a list, which is not included in the standard setup of the	Dashboard configuration
	dashboard, choose the list from the	Available widgets
	relevant category under <i>Available</i> widgets and drag it to the desired	► CASES ► CONTACTS
	position.	► DOCUMENTS
		► MY LISTS
	Tip: The searches you have saved will be	▶ PROCESSES
	in My lists.	► SHARED LISTS
		► SUBSCRIPTIONS
	Save your changes.	▲ USER TASKS
		Save
Remove list	To remove a list from the dashboard,	
	double click on the list.	
Rename Dashboard	It is possible to rename your dashboard.	▲ DASHBOARD
Dashboard	Click on the nut by the DASHBOARD – a wrench will now appear next to Default	Default dashboard
	dashboard.	Default dashboard
	Click on the wrench and then on	
	Rename dashboard.	Default dashboard Rename dashboard
		Recent cases Rename dashboard

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Multiple	It is possible to have more than one	■
dashboards	dashboard. To create a new dashboard,	Dashboard
	click on Dashboard on the navigation	Sustinoura
	pane.	
	Name your new dashboard and click	
	Save.	
Customise	this granible to all and which calvage	
columns	It is possible to choose which columns	K.A.
Columns	to display in the windows (widgets) on	
	your dashboard. In the window (widget)	Size column to fit
	you want to customise, click on the	Size all columns to fit
	arrow-icon in the top right corner.	Case closed
		✓ Case handler
	The window then expands.	Case type
	Right-click on the pane with column	✓ Created
	names, then click More	✔ Due date
	In the dialog box Select columns you	Planned close
	,	Process
	can see the existing columns on your list	More
	(left window) and add possible columns	
	(right window). Add a column from the	
	window on the right by ticking the box	
	next to it and then click the bottom	
	arrow.	
	To remove a column from the list, tick	
	the box next to it, then click the top	
	arrow.	
	You can also double-click the headlines	
	to move the columns.	
	Drag and drop the columns to place	
	them in your desired order.	
		Save
	Click Save to save the new settings.	Save
	Tip:	
	To widen or reduce the width of the	
	columns, pull next to the column title.	
	You can reset the standard	
	configuration of the columns by clicking	
	Reset in the bottom left of the dialog	
	box Select columns.	

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