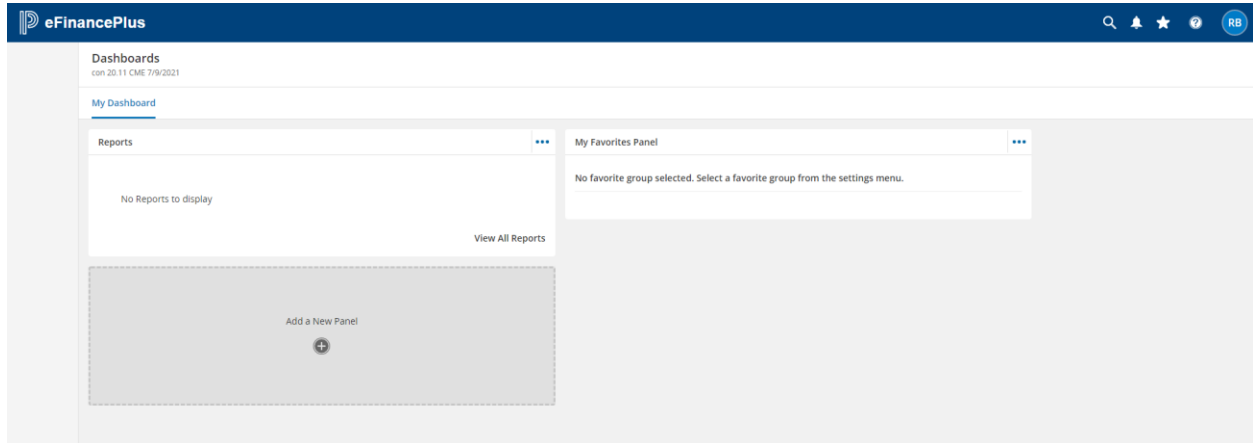




eFinancePlus 20.11: Dashboard

When logging into the system for the first time your dashboard is going to be blank, see example below.

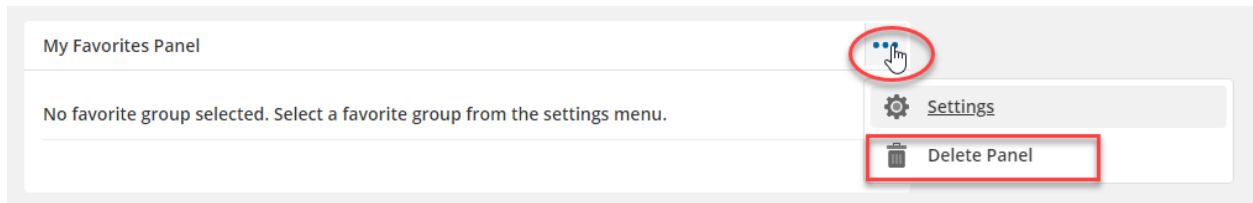


Notes about your dashboard.

- You are not able to drag or move your panels around to sort them. You will have to delete and re-add so with that said when setting up your panels think about the order you want to see them
- Your dashboard is now one screen so all your panels will be a continuous scroll
- You have three types of panels to pick from (Favorites, Reports, and KPIs)
 - Favorites are the screens you favorite and group together
 - The reports panel was previous known as documents.
 - KPIs are quick glance informational panels

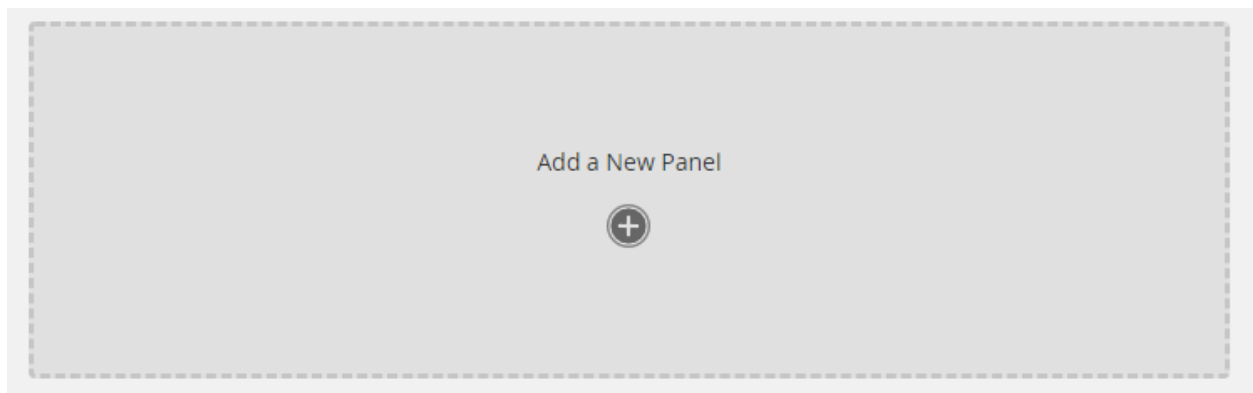
How to delete a panel

Select the three dots in the top right-hand corner of the panel you want to delete and select delete panel.

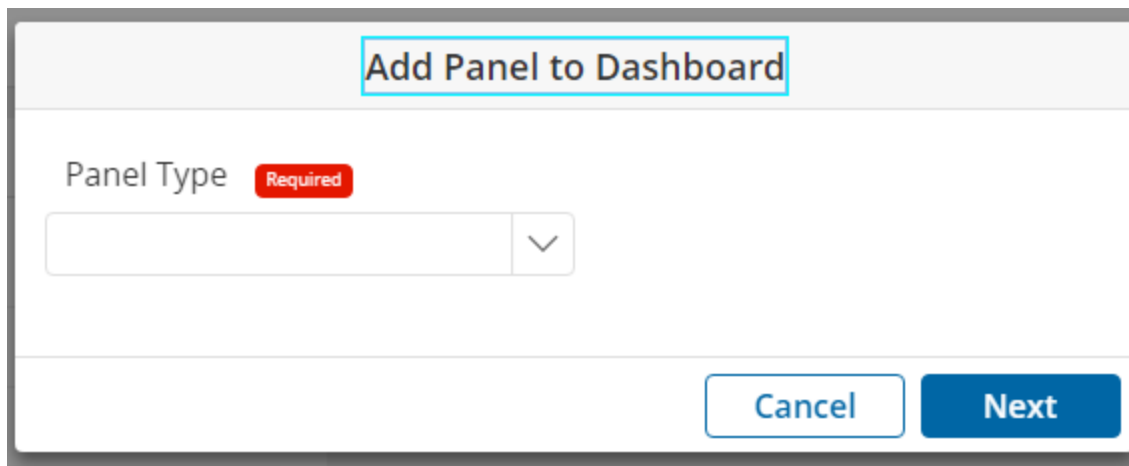


How to add a panel

Select the panel that says Add a New Panel.



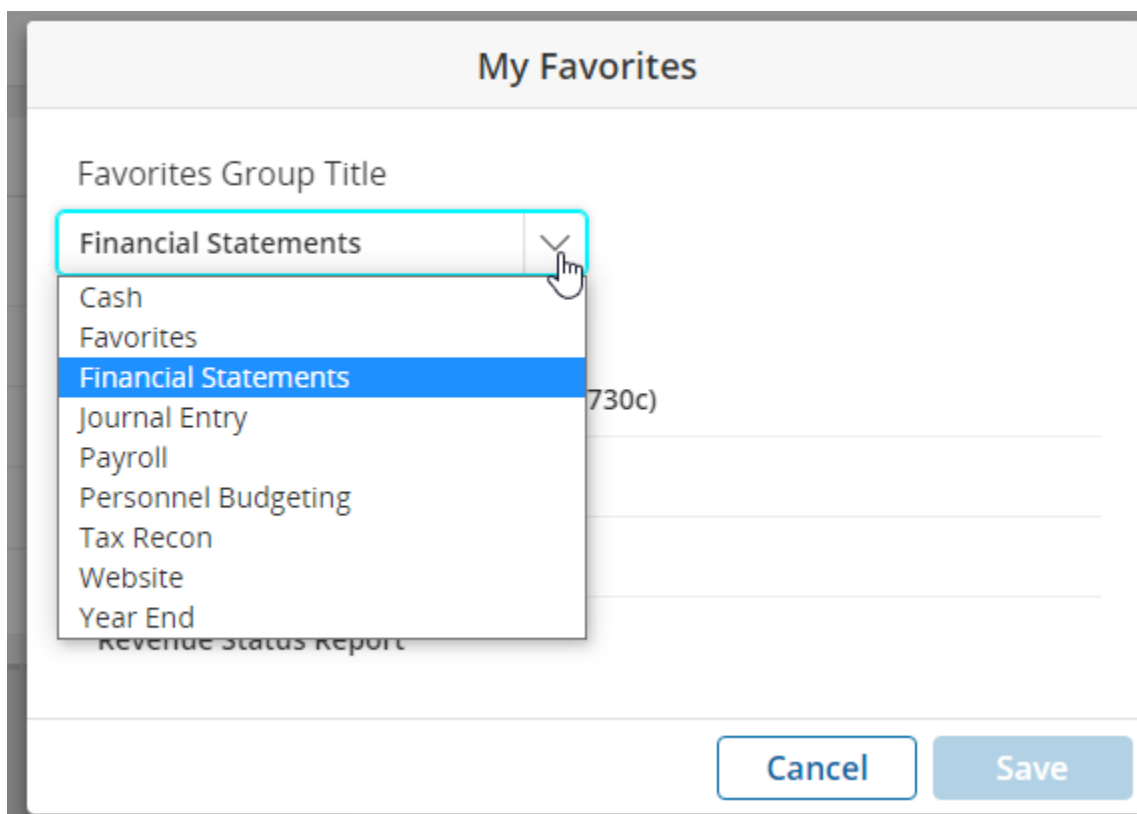
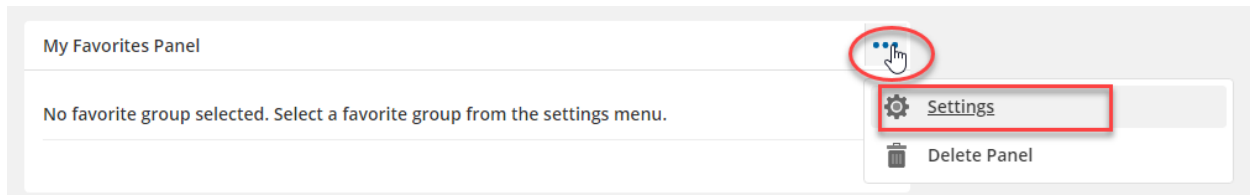
Once selected a box will pop up labeled Add Panel to Dashboard.

A screenshot of a modal dialog box titled "Add Panel to Dashboard". Inside the dialog, there is a label "Panel Type" followed by a red "Required" tag. Below this is a dropdown menu with a downward arrow. At the bottom right of the dialog, there are two buttons: "Cancel" and "Next".

Select what Panel you want to add to your dashboard in the Panel Type drop down box. The panels will be separated into three panel types (Favorites, Reports and KPIs). This is where you will see your group of favorites you have previously created. Once your panel is selected click Next and you will see the Panel added to your Dashboard. Remember there is no way to drag and move your panels to sort without deleting and re-adding them so add them in the order you want to see them.

How to change a Favorite Panel to display a different favorites group

If you have multiple Favorite Groups and you do not want to add multiple favorite panels you can change what the favorites panel displays. Select the three dots in the top Right-hand corner of the favorites panel and select settings. A box will pop up labeled My Favorites. This will give you a drop-down box listing all of your Favorites Group Titles. Select with Title you want to display and press save.



How to add or delete a screen from your Favorite

Search for the screen you want to add to your favorites. Once on the screen look for the stars with a + and - at the top of the screen. Select the star with the + to add to your favorites or the star with the – to delete from your favorites.



Once the star + is selected a box will pop with that says Add to Favorites. You can change the name of the screen in the Favorites Name box. You must select a favorites group name you want to add this screen to. If you want to create a new group select create new group button and a screen will pop up labeled Add Favorite Group. Type the name you want and press okay. Your new group name will show up in the group name drop down box. Once both fields are selected press okay and the screen has been added to your favorites

Two screenshots of dialog boxes. The top dialog box is titled "Add to Favorites - con 20.11 CME 7/9/2021". It has an "Information" section with the text "Press OK to add this option to your favorites." Below this is a "Favorites Options" section. It contains a "Favorite Name *" field with the text "Expenditure Budgets" and a "Group Name *" dropdown menu. To the right of the dropdown is a "Create Group" button. At the bottom right are "OK" and "Back" buttons. The bottom dialog box is titled "Add Favorite Group - con 20.11 CME 7/9/2021". It has an "Information" section with the text "Enter your group name and press OK to create." Below this is a "Create Favorite Group" section. It contains a "Group Name *" text input field. At the bottom right are "OK" and "Back" buttons.

Once the star- is selected a box will pop up that says Delete Favorites. Select what favorite group you want to delete the screen from and select ok.

Delete Favorite - con 20.11 CME 7/9/2021

Information

Holding the ctrl key down on the keyboard, select each row to be deleted or use shift to select an entire range of records.

Then press OK to delete the option(s) from your favorites.

Favorite Group	Favorite Item
Favorites	Expenditure Budgets

OK

[Back](#)