

# HOW TO: USE AND CUSTOMIZE THE DASHBOARD

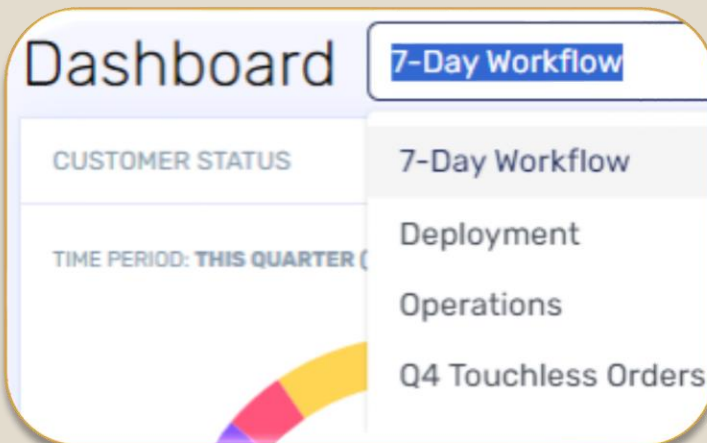


- In the left-hand navigation bar, click the Dashboard tab to access metrics related to your Conexiom account.

## About the Dashboard

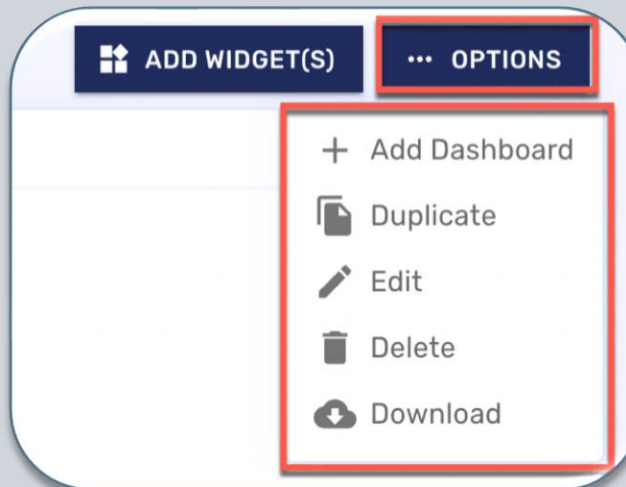
- The dashboard page is comprised of widget.s
  - Widgets show statistical graphs for one data set/criteria.
- Conexiom supports multiple dashboards, so you can add, modify, and/or group widgets to strategically focus on specific metrics.
- Once you've saved your first dashboard(s), you can use the dropdown menu to select which dashboard to view.

*For more information on the default widgets and their options please see the user guide*



## Dashboard Options

- **Add** – Creates a new dashboard
- **Duplicate** – Creates a copy of the dashboard that is currently open
- **Edit** – Allows for changes to the dashboard name and date range
- **Delete** – Deletes the dashboard that is currently open
- **Download** – Downloads an Excel file of the dashboard, where each widget is a separate sheet



## Widgets

- **Add** – Using the “Add Widget(s)” button, you can create a new widget
  - Within the pop-up window, you must click “Add” next to the widgets you want to add, and “Add # Widget(s)” to save your selection to the dashboard.
- **Move** – Click and drag a widget to move it to a new location in the dashboard
  - When you drag a widget to a new location, the next widget to the right or in the line below will take its place
- Within each widget header is a menu
  - **Download** – Downloads an Excel file of the widget
    - Note that for most widgets, the data that you see is the data you will get ie. A count of documents in various statuses will not provide granular data about specific documents.
  - **Refresh** – Updates the widgets, as they do not display in real time
  - **Settings** – Allows you to customize and/or delete the widget