



Custom Dashboards

2016 - Fall Edition

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Overview

Custom Dashboards allow the user to create their own customized dashboard equipped with their specific needs. Custom Dashboards can include any combination of the available dashboards within Club Intelligence. In this manual we will discuss how to create a new Custom Dashboard.

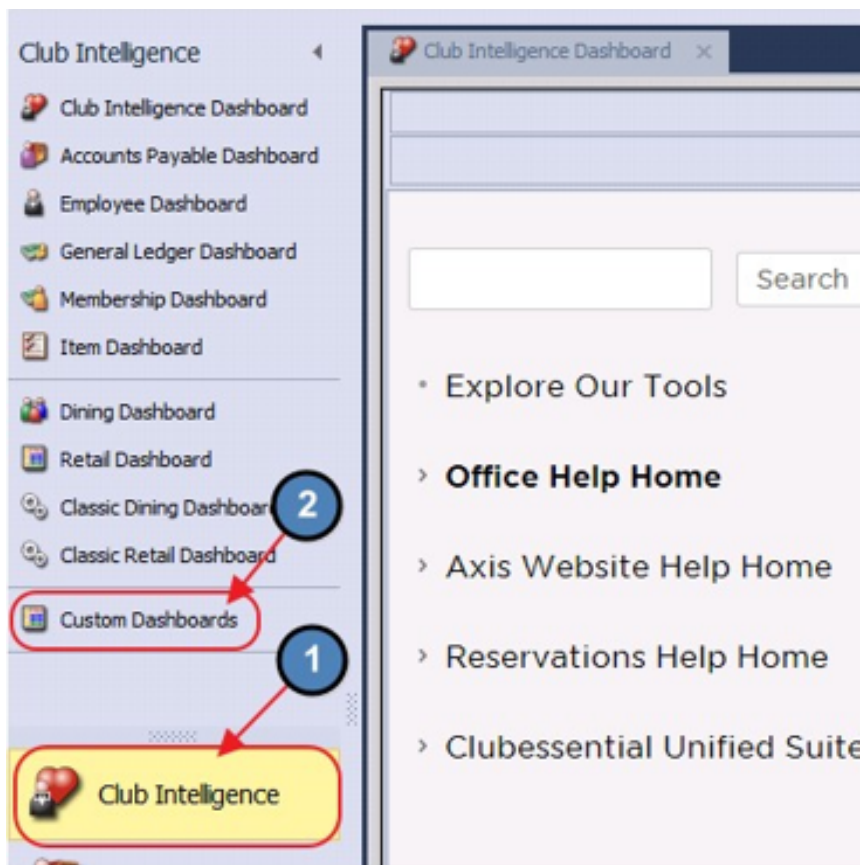
Use Case(s)

A Club would like to view their Open POS Tickets in a dashboard. The Club designs a custom dashboard to contain the items they want to see at a glance.

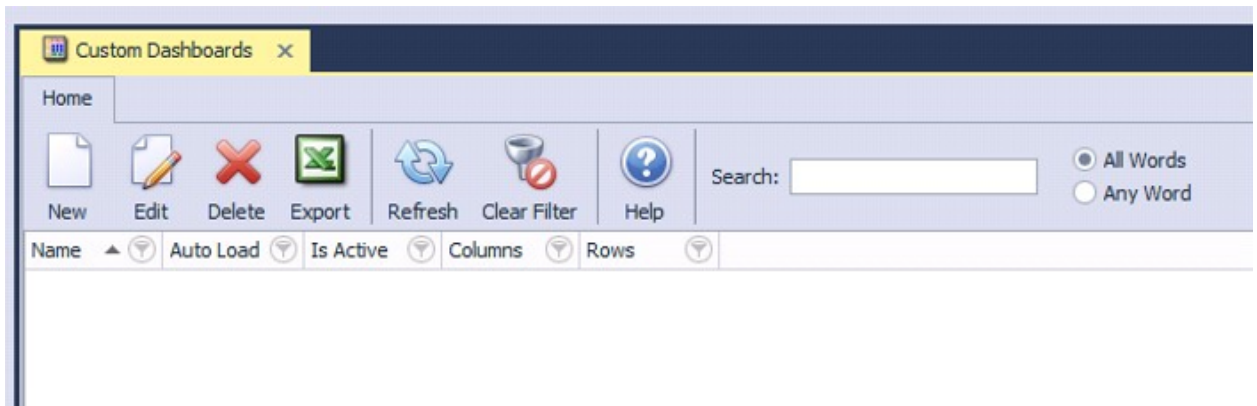
Accessing the Tool

To access **Custom Dashboards**,

- 1) Select **Club Intelligence** from the left user menu and choose **Custom Dashboards** from the available options.



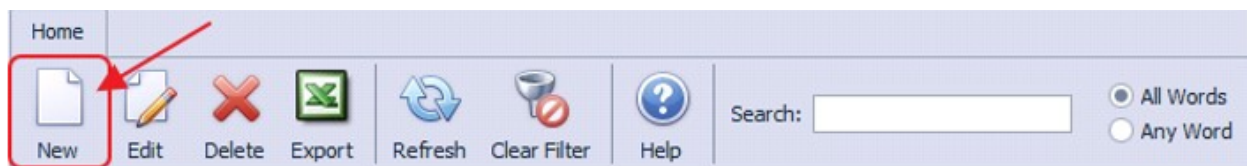
2) The **Custom Dashboards Grid** will launch.



Create a New Custom Dashboard

To create a new Custom Dashboard,

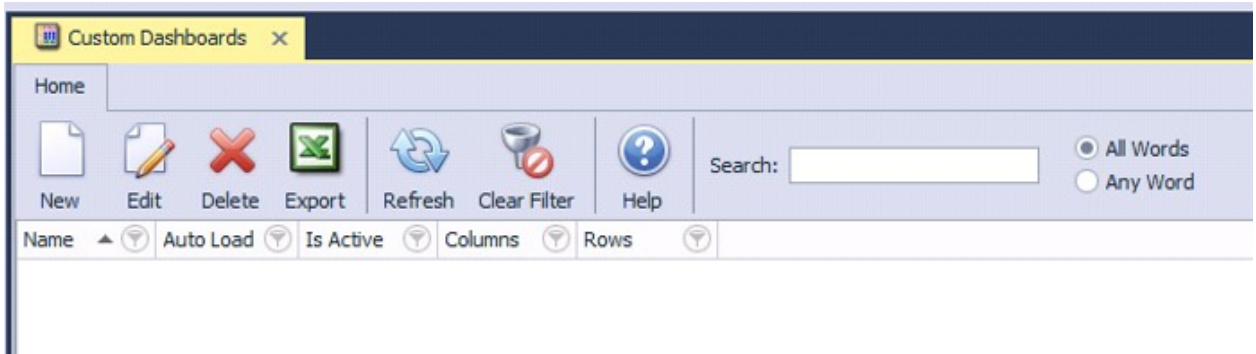
1) Select the **New** Icon



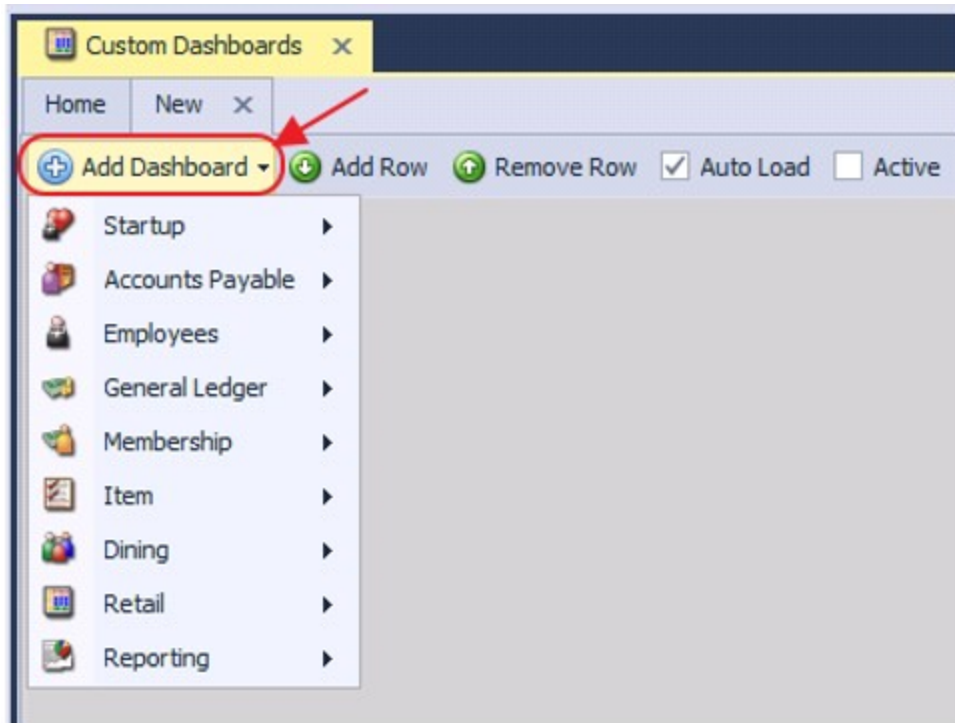
2) Enter a **Layout Name** for the new dashboard. Click **OK**.



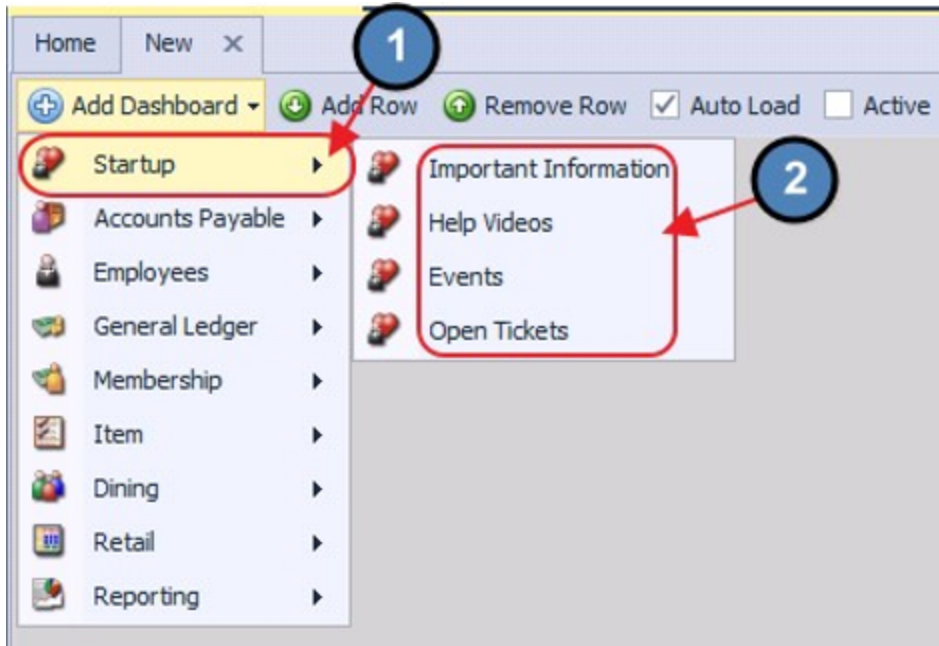
3) The Custom Dashboard setup screen will launch.



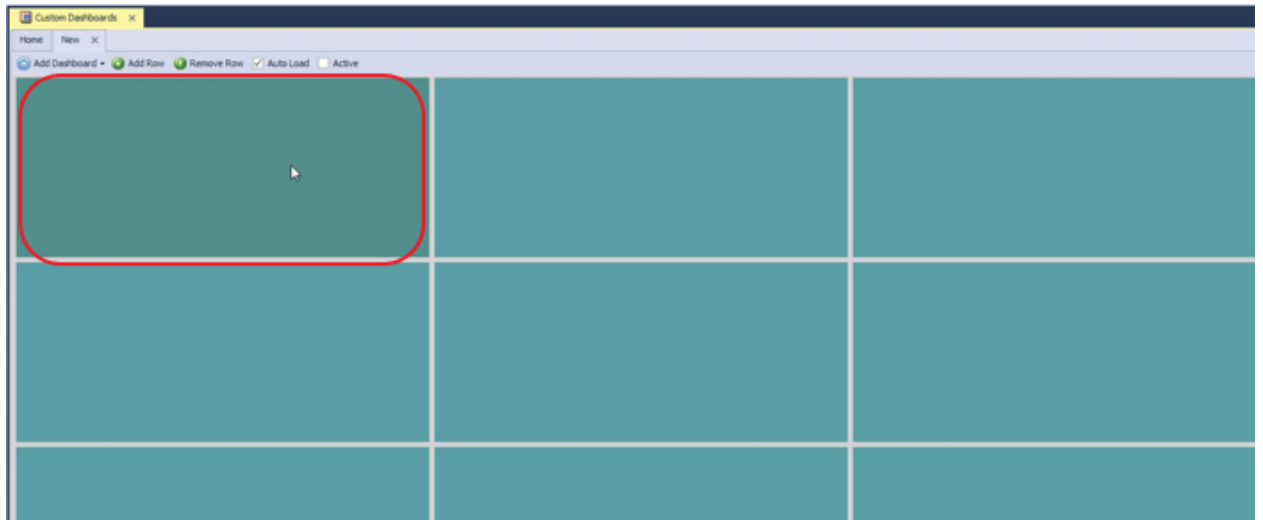
4) To add a dashboard to the screen, select the **Add Dashboard** drop down and a list of available modules will appear.



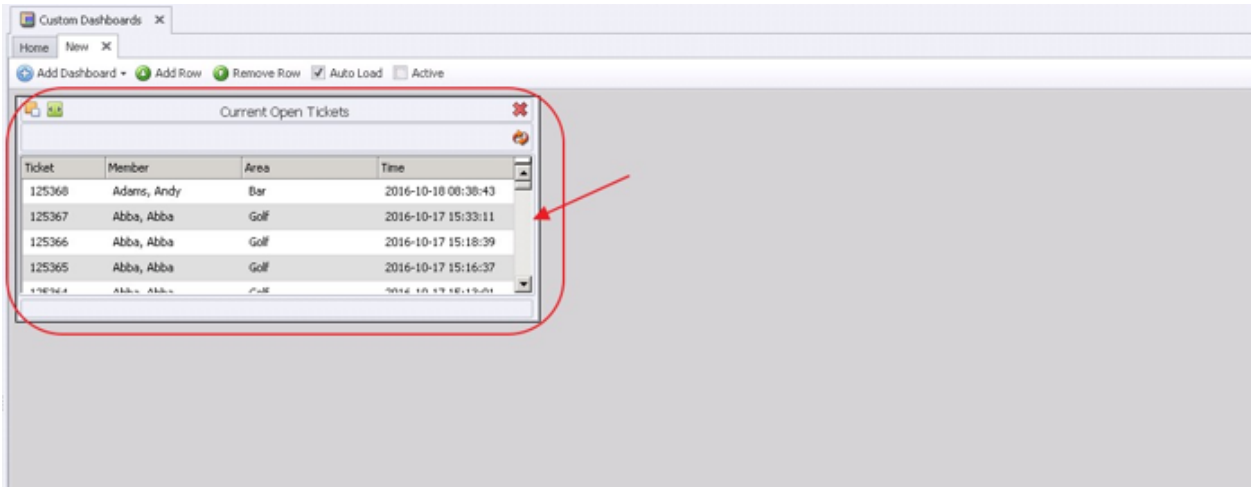
- 5) Hover over a module to see the available dashboards for that specific module. Then, select the desired dashboard from the available list.



- 6) Once a dashboard is selected, select the space the dashboard should be placed on the screen. Use the mouse to hover over the desired space.



7) Once a space is selected, the dashboard will populate.

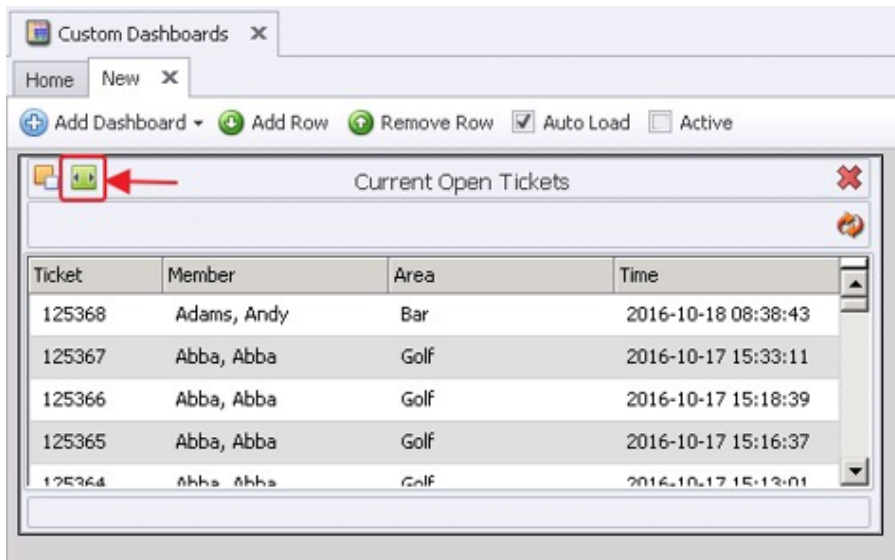


8) Add any other desired dashboards as applicable.

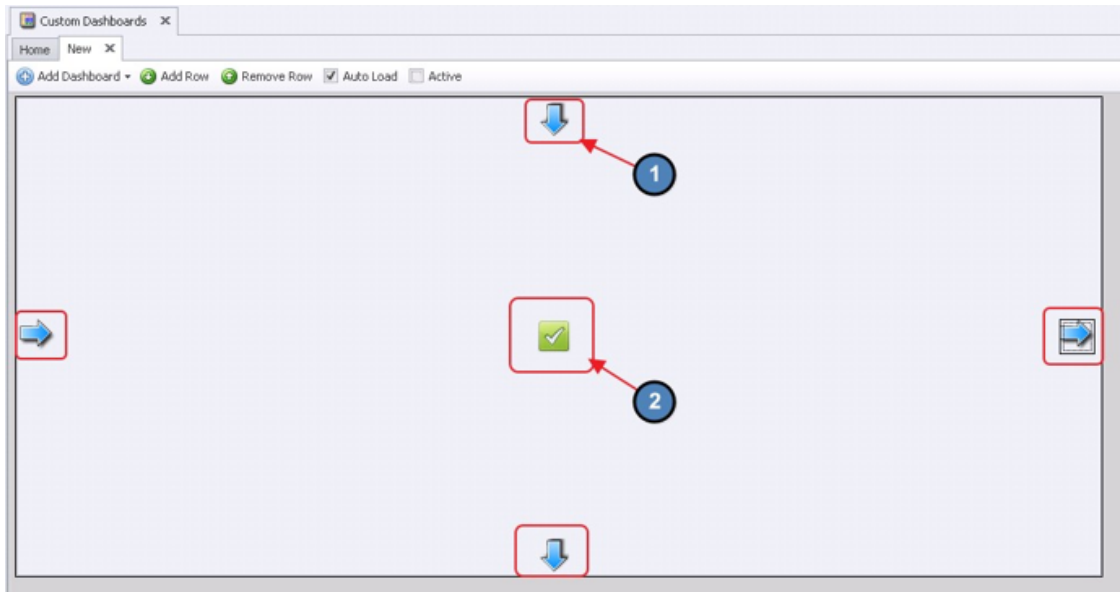
Edit a Custom Dashboard

Adjust Size of Dashboard

To adjust the size of any dashboard, select the green adjustment icon on the top left corner of the dashboard.

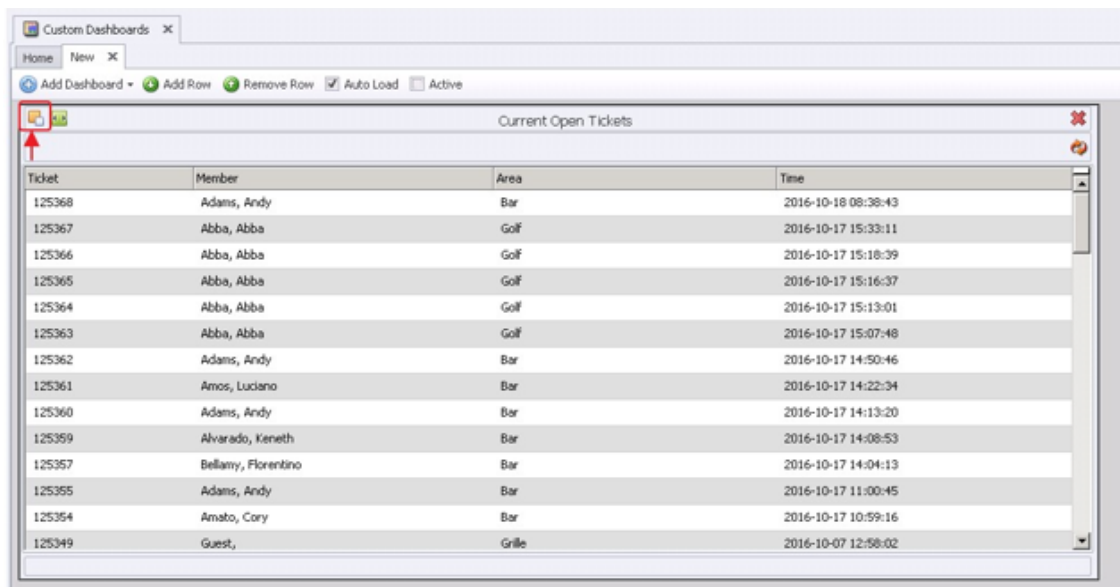


Use the blue arrows to increase the size of the dashboard. Click the green check mark when the adjustment is finished.

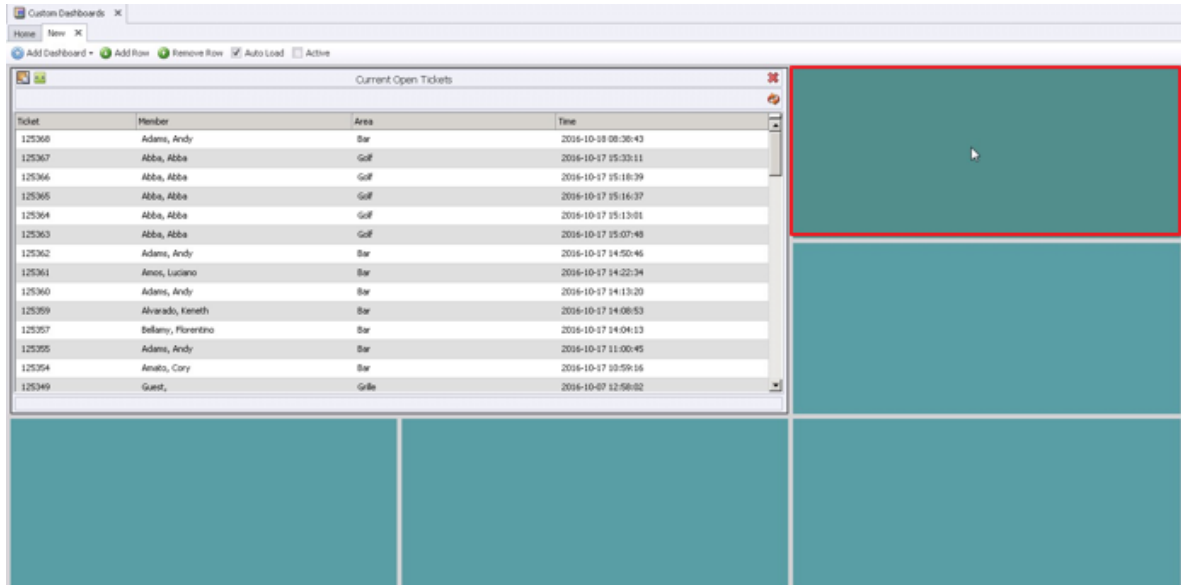


Move Dashboard to New Location

To move a dashboard to a new location, select the green adjustment icon on the top left corner of the applicable dashboard.



Select the new space the dashboard should be located.



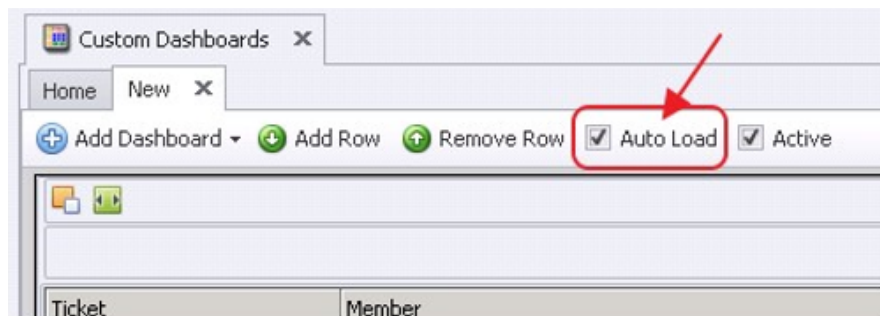
The dashboard will move to the new location and adjust to the appropriate size.



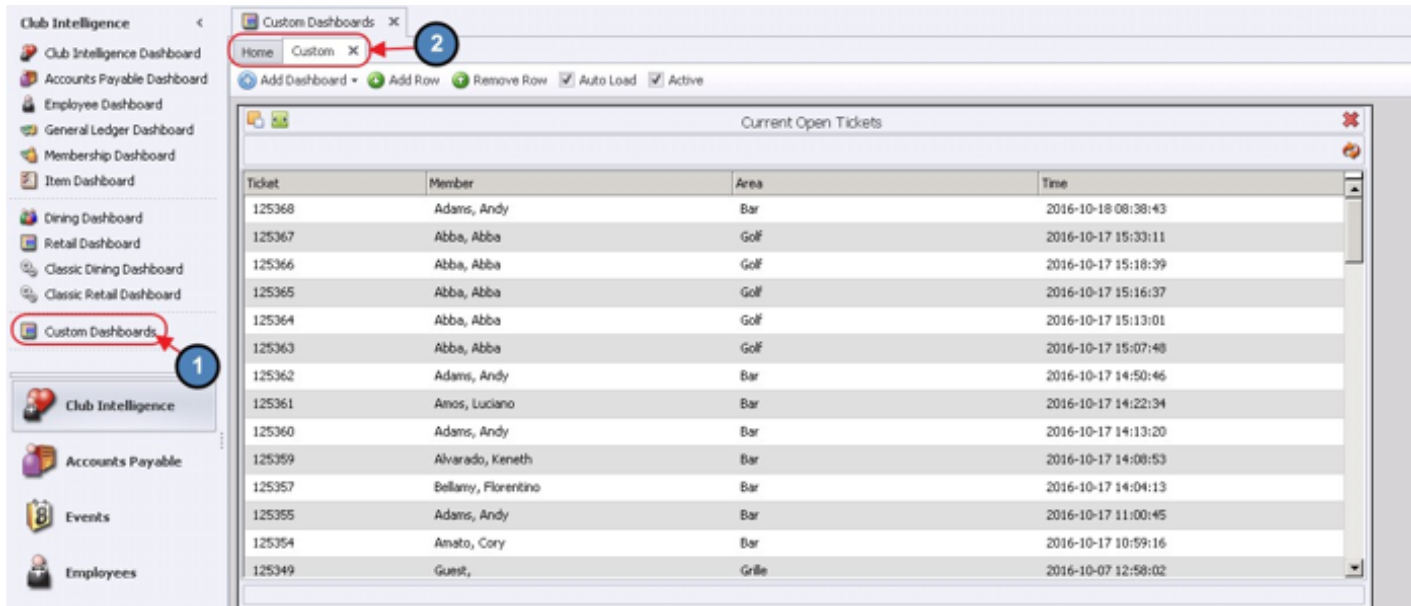
Auto Load Option

Once a new dashboard is created, the dashboard can be set to **Auto Load** when the Custom Dashboard option is selected.

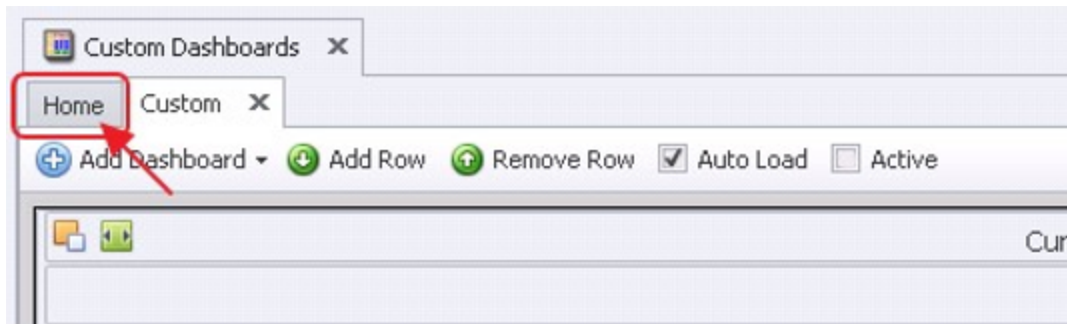
To do so, please check the **Auto Load** check box on the corresponding Custom Dashboard.



Now, when Custom Dashboards is selected from the available Club Intelligence options, the selected Custom Dashboard will automatically load.

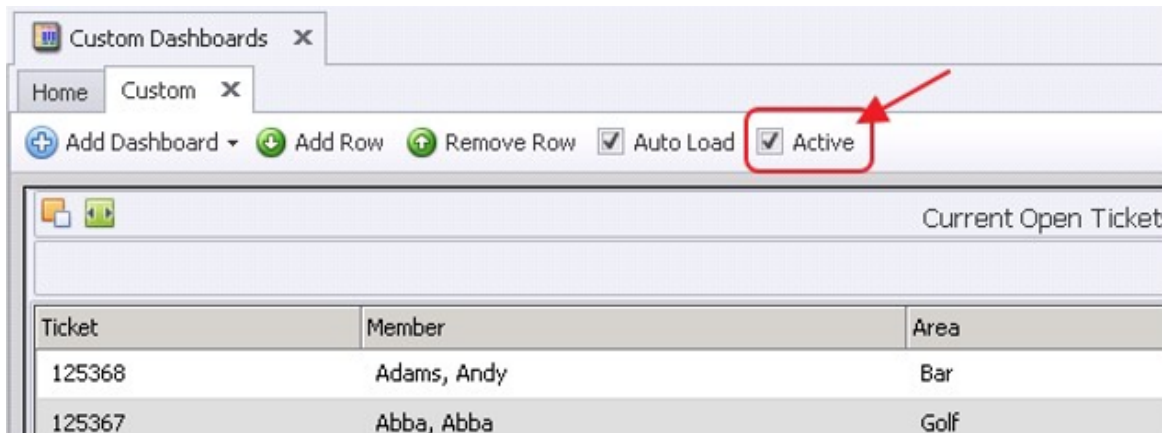


Select the **Home** tab to create any new dashboards.



Active Option

If multiple Custom Dashboards are set to Auto Load, please check the **Active** check box on the Dashboard that should be loaded first.



Frequently Asked Questions

How do I inactivate a dashboard view?

Simply uncheck the **Auto Load** and **Active** options within the **Custom Dashboards** screen.

How do I ensure that a particular Dashboard is loaded first?

Ensure the **Active** option is checked within the **Custom Dashboards** screen.

Best Practices

Ensure the Dashboard Tiles you have designated to display are actively utilized. It is better to have fewer items on a dashboard that are used, than many on a dashboard that are not used.