

USER GUIDE

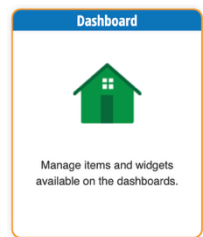
Customize User Dashboard

Administration User Guide

As a company administrator, you have the ability to edit and control what is on your **Dashboard**. The dashboard is the page you land on after you log onto your website. Your dashboard is designed to show you a complete overview of where you stand within your program.

Your users also have the ability to control and edit what is on their dashboards. You can restrict the changes that your users can make to their individual dashboards using the **Customize Dashboard and Organize Dashboard** functions.

To access these functions, we start off by accessing the **Admin** section via the **Admin** button at the top right side of your website. If you do not see this button, you may not have the proper administration privileges in the system.



From your administration options, select the **Dashboard** icon.

Dashboard

Customize Dashboard
Use this function to manage and customize the widgets that the company or organizational level has access to seeing on their dashboard.
Organize Dashboard
Use this function to organize and position the widgets displayed on the dashboard for the company or specific organizational level.
Add Widget
Use this function to manually add a new custom widget to a company's dashboard.
Manage Widget
Use this function to update a custom widget on a company's dashboard.

To control your users' ability to modify their own dashboards, select the **Customize Dashboard** option.

Customize Dashboard

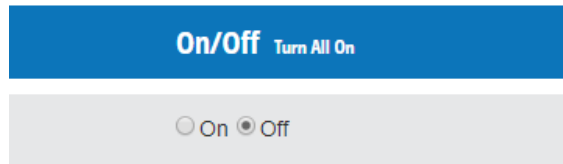
On this page, you will see a number of different widget types that you can turn on or off. Under each widget type, you will see individual widgets of that type, which can be turned on, off, or restricted.

☒ Company ☐ Company Level ☐ Permission Type ☐ User

Dashboard Widget	On/Off Turn All On	Allow User To Move Turn All On	Allow User To Remove Turn All On
Banner	☒ On ☐ Off		
Banner	☒ On ☐ Off	☐ Yes ☒ No	☐ Yes ☒ No

Turning Dashboard Widgets On or Off

If widget types or individual widgets are turned on, then they will appear on your users' dashboards by default (and in the position you have placed them – which we will review in the **Organize Dashboard** section). If widget types or individual widgets are turned off, they will not appear on your users' dashboards, and your users will not have the ability to turn them on.



On/Off Turn All On

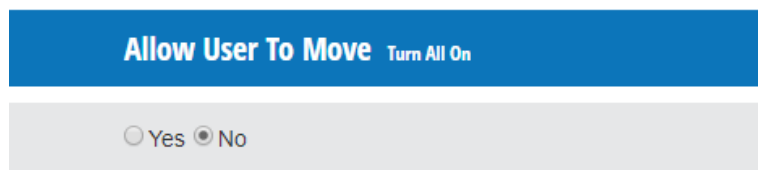
☐ On ☒ Off

To turn widget types or individual widgets on or off, select **On** or **Off** in the **On/Off** column next to the corresponding widget type or individual widget. You can also click the **Turn All On** button at the top of this column to turn on all widgets at once. If all widgets are turned on, this will be replaced with a **Turn All Off** button, which turns off all widget types when clicked.

When you are finished, do not forget to click the **Save** button at the bottom of the page to save your changes.

Allowing Users to Move Widgets

You also have the ability to lock dashboard widgets in a specific location on the dashboard, which would mean users are not allowed to change the location of the widget. For example, maybe you want to lock an orientation video into place at the top of the screen. To do this, we will make use of the **Allow User to Move** setting. This setting only applies to individual widgets on the dashboard.



Allow User To Move Turn All On

☐ Yes ☒ No

If this option is set to **Yes** for a widget, then the user is allowed to move this widget on their own dashboard from the location specified on the company's **Organize Dashboard** page. If this option is set to **No** for a widget, then that widget will be locked in the specific location set on the company's **Organize Dashboard** page. For details on how widgets are locked in place, see the **Organize Dashboard** section below.

To allow users to move a widget on their dashboard, or to lock the widget in a specific location on the dashboard, select **Yes** or **No** (respectively) in the **Allow User to Move** column next to the corresponding widget. Make sure to click the **Save** button at the bottom of the page to save your changes.

Allowing Users to Remove Widgets

Are there widgets on your dashboard that are non-essential that you don't mind if user's remove from their own dashboards, should they want to? You can do this through the next dashboard setting. This setting only applies to "individual" or "personal" widgets on the dashboard (for example, their own progress in training).

Allow User To Remove Turn All On

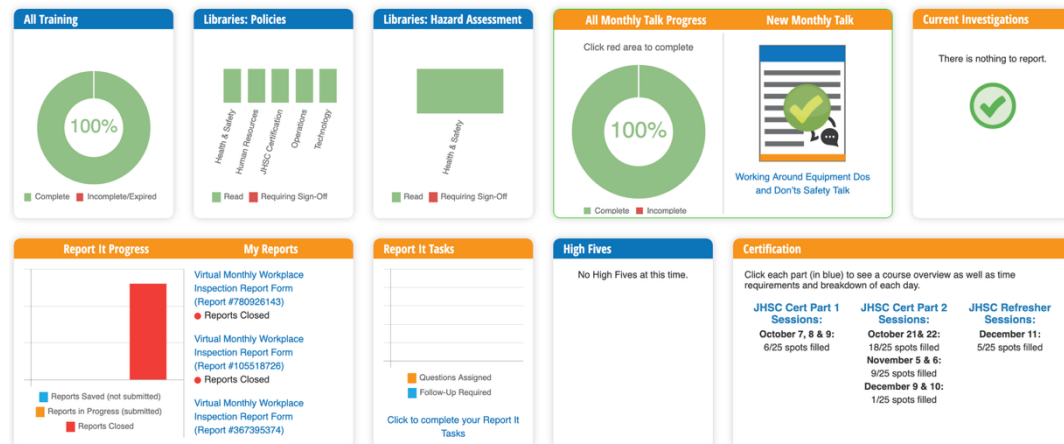
☐ Yes ☒ No

By selecting **Yes** under **Allowing User to Remove**, users are able to turn off the selected widget on their own dashboard. Please note, that they can always choose to turn it on again later. If this option is set to **No**, then the user is not allowed to turn this widget off on their own dashboard.

Make sure to click the **Save** button at the bottom of the page to save your changes.

Organize Dashboard

After new widgets are added, settings are changed, or when you want to freshen up the look of your dashboard, you can use the **Organize Dashboard** from your administration options to change the location of widgets on the dashboard. You will likely use this setting most often after new widgets are added (as they will always default to the last position). When you select the option to organize your dashboard, the page will load a preview of your current Dashboard, where you can organize the layout by dragging and dropping widgets to the correct locations.

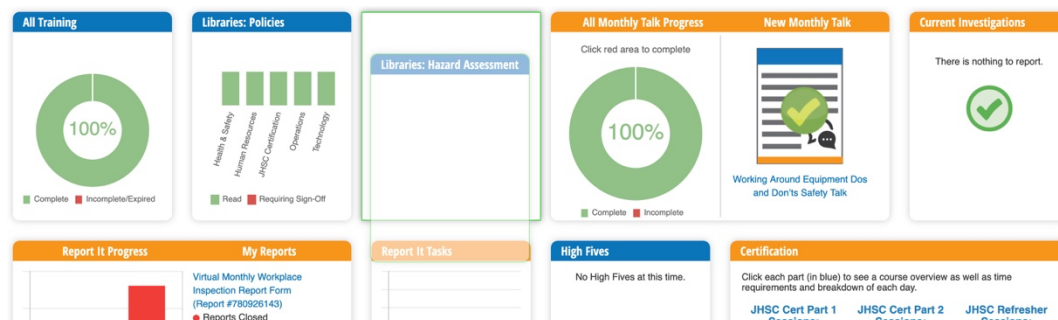


The dashboard layout that you set up here will be the default layout for all of your company's users. However, if you have allowed your users to move specific widgets in the **Allowing Users to Move Widgets** section above, they will be able to move any allowed widgets and change the layout of their dashboard.

If you have locked any widgets in a specific location, your users will not be able to move them from that widget slot. This is determined numerically, starting at the top row and moving from left to right. For example, in the screenshot above, the All Training widget would be in the 1st position, Libraries: Policies in the 2nd, Libraries: Hazard Assessment in the 3rd, Monthly Talk in

the 4th, and Current Investigations in the 5th. If you lock a widget in one of these slots, it will always stay in that slot, regardless of how your users move other widgets around on their dashboards.

Again, to move the widgets, simply select them with your mouse, hold down and move to the new location.



When you are finished organizing your Dashboard, click **Save** in the bottom right.