Customizing the Dashboard

You can customize the layout of your Dashboard by determining which of the shared reports you want to display and where on the Dashboard they are located.

1. Viewing Full Reports

The reports that display on the Dashboard provide an at-a-glance view of the full reports available on the Reports page. To access the full reports, click Reports in the menu bar or click the magnifying glass icon on the Dashboard.

Note: The report will open in the Reports section. To go back to the Dashboard, click Home in the menu bar.

2. Removing Reports

You can remove any of the reports that appear on your Dashboard. Removing reports from your Dashboard view does not delete the report from the Planning Portal.

- Click the close button in the upper-right corner of the report
- On the confirmation message, select Remove. The report will no longer appear on your Dashboard.

3. Adding Reports

- On the Dashboard, click Add Report.
- In the Choose a report list, select the report that you want to display, and then click Add. The report is added.
- Click Close.
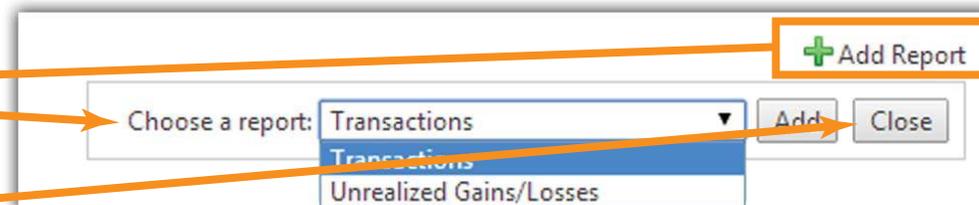
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4. Minimizing Reports

If you do not want to view a report each time you access your Dashboard, but do not want to remove it completely, you can simply minimize the report. To view the report at any time, you can maximize it.

- Click the minimize icon in the upper-right corner of the report
- When minimized, the report displays lists the title only.
- To maximize the report again and view it on the Dashboard, click the maximize icon.

5. Changing the Layout

You can change the layout of the reports displayed on your Dashboard. For those reports you have selected for your Dashboard, you can use the drag-and-drop method to arrange the reports on the page.

- For the report you want to move, left-click the move handle on the left corner of the top bar.
- Drag the report to the desired location. A dashed line highlights the new location.
- Drop the report by releasing the mouse button. The report snaps into place.