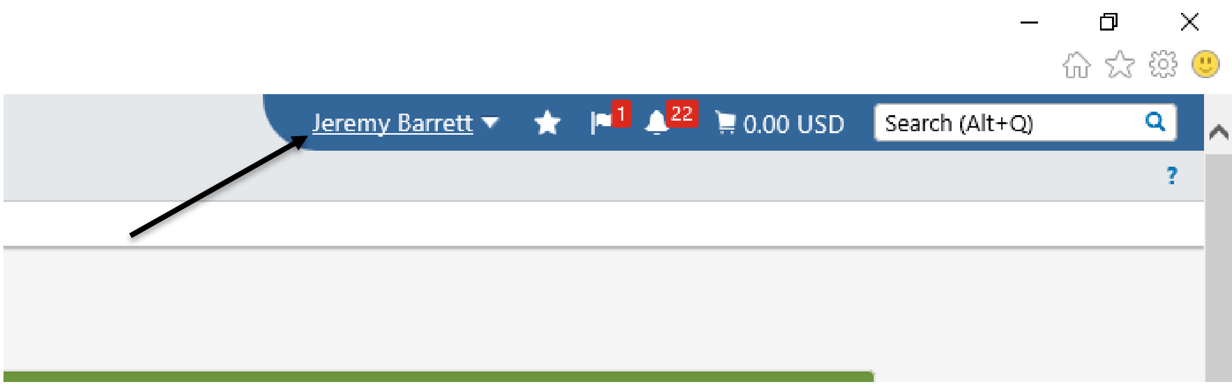
Sam Houston State University

Creating Personal Dashboards in BearKatBuy

This training guide will assist you with creating a personal Dashboard. A personal Dashboard will allow you to have everything you use on a regular basis together on one page, and may be set as your personal home page.

1. Click on your name in the upper right corner.



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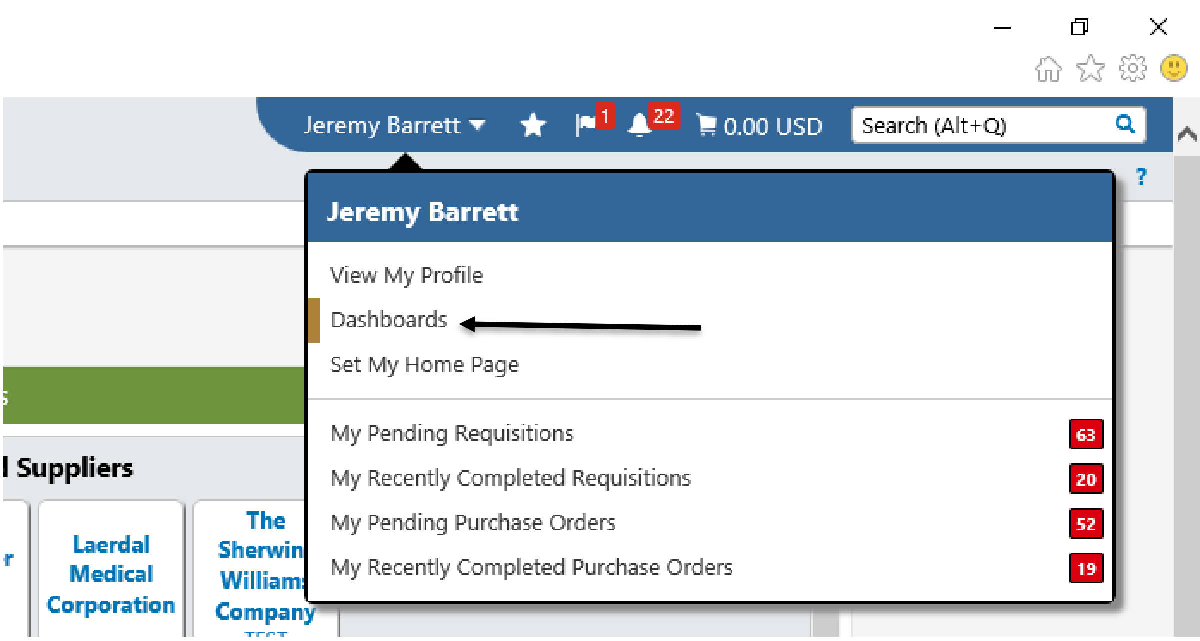
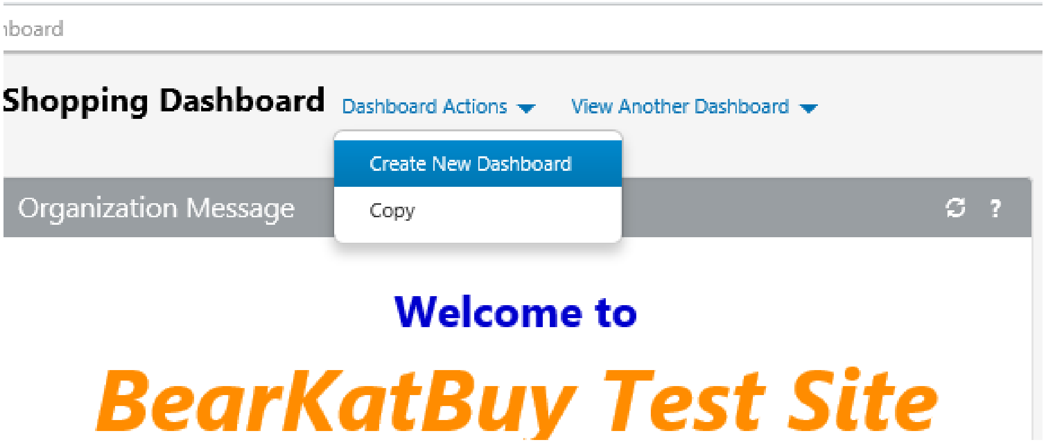
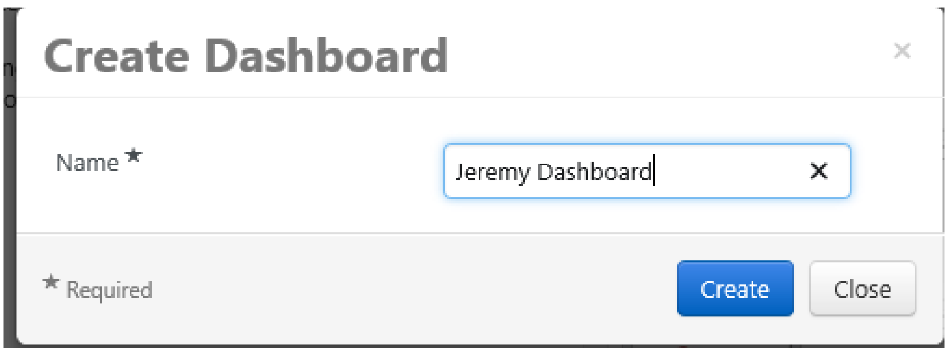
2. Click on Dashboards.



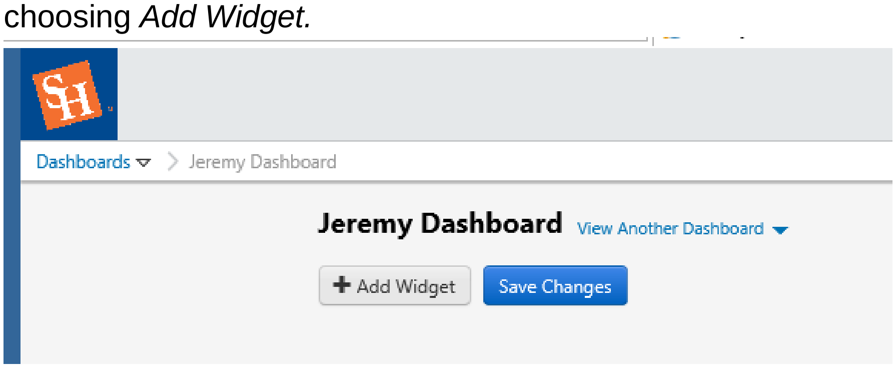
3. The Dashboard that displays will depend on your roles. Click on *Dashboard Actions* then *Create New Dashboard* to begin the process.



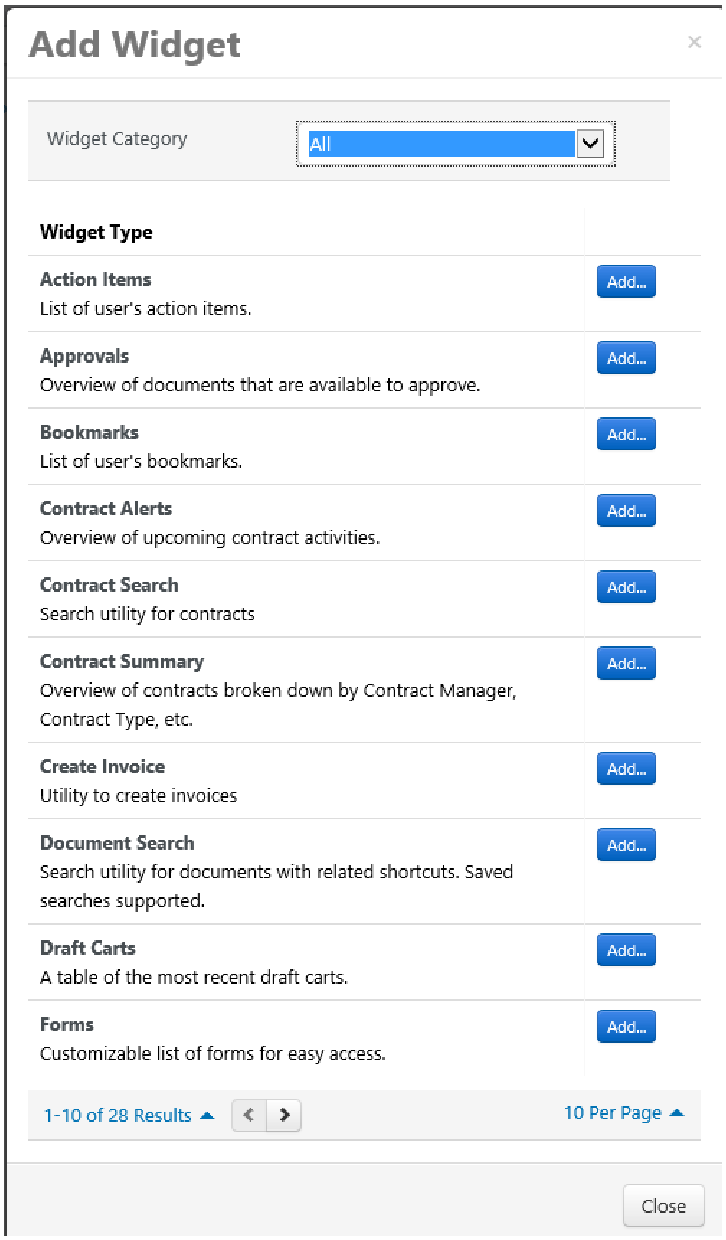
4. Name your Dashboard and click on the blue *Create* button.



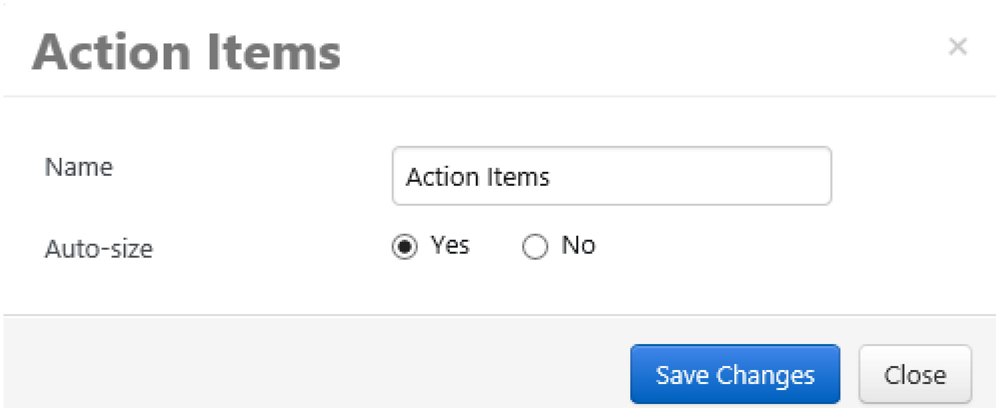
5. Now choose what content you would like displayed on your Dashboard by choosing *Add Widget.*



6. The box that pops up will allow you to select which widgets to add. There is a brief description below the name of the widget. The widgets displayed are dependent on your assigned role in BearKatBuy, so you may not see all of the widgets below depending on your role in BearKatBuy. Click on the blue *Add* button to add a widget to your Dashboard. Some of the widgets are customizable, while others will just display preset information.

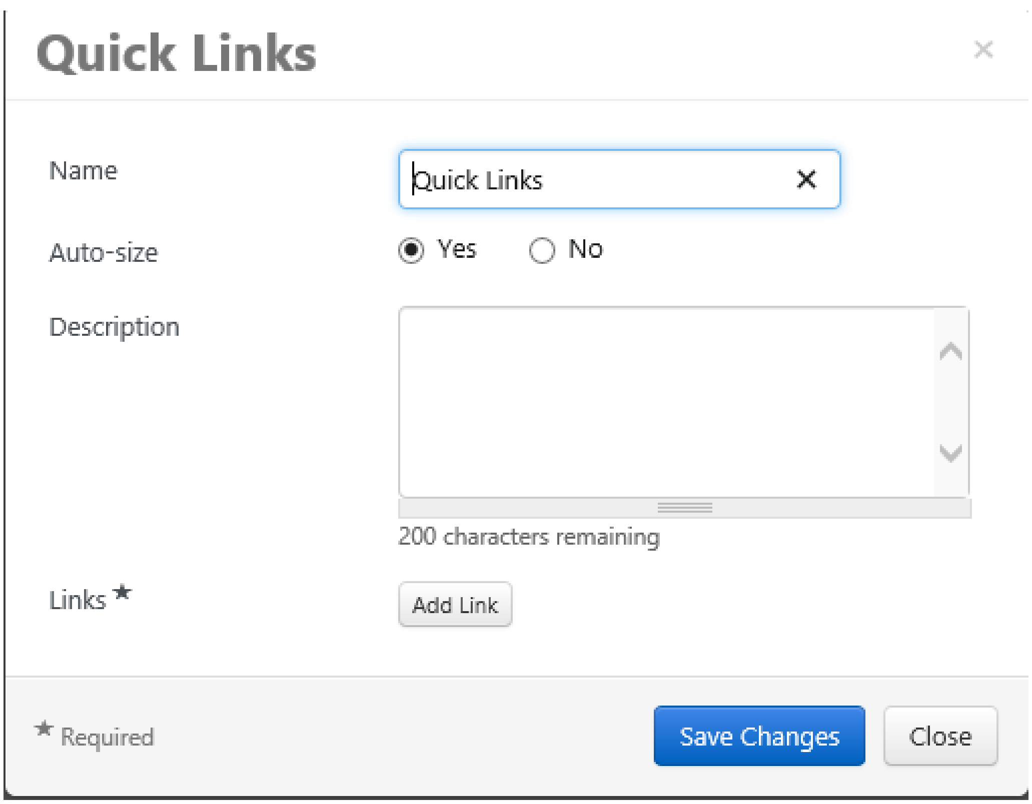


7. The following screenshot shows a widget where the only options are to rename the widget or whether the widget should be auto-sized or not. Selecting no for the auto-size will allow you to change the size of the widget on your screen to achieve the layout you desire.



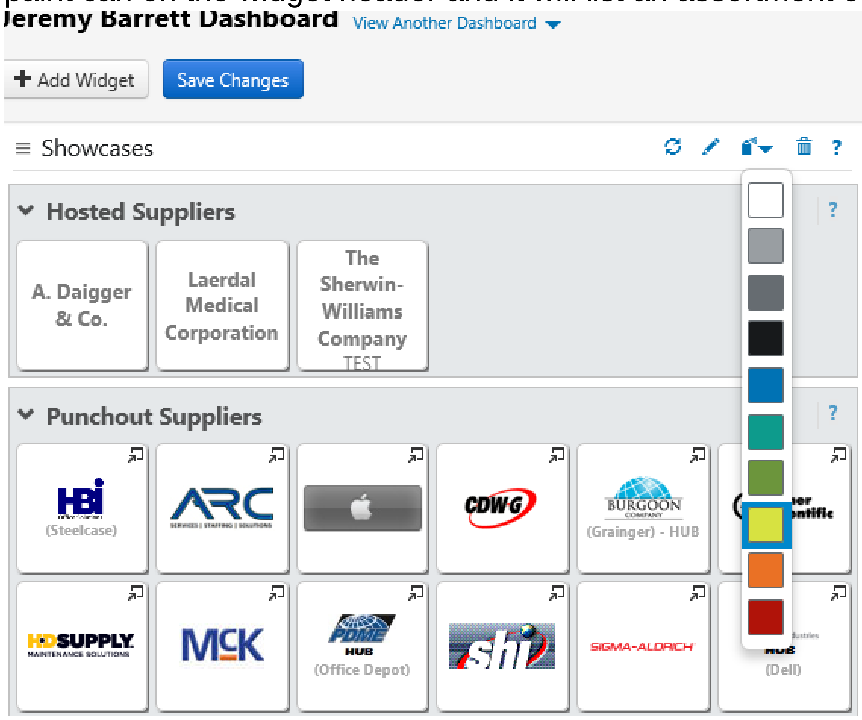
8. Widgets that are set to *No* in the *Auto-size* field may also be resized by clicking and dragging the bottom right corner of the box. When choosing the Organization Message and the Showcases widgets they will need to be put side by side and not on top of each other. The Organization Message widget will take up the room needed to show the entirety of what is on the current message page.

9. The following widget is customizable. Quick Links is customizable where you can choose links/websites that you use frequently and have them readily available.



10. Once the widgets are on the Dashboard, you can organize the widgets by importance by dragging and dropping them to reorder. To do this, simply hover over the header on the widget and you can drag and drop them to the location you desire on the Dashboard.

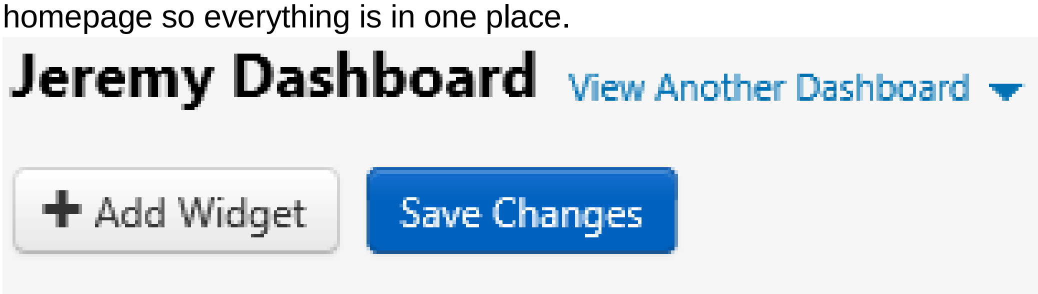
11. The header color for each widget may be customized as well. Simply click on the paint can on the widget header and it will list an assortment of available colors.



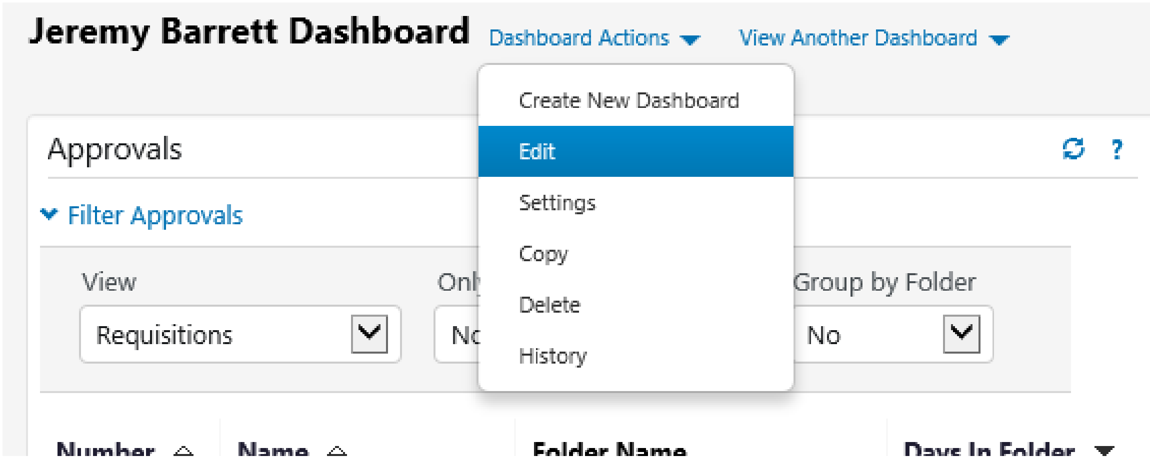
12. The Widgets that are highly suggested to have on each users Dashboard are the following:
Organization Message
Showcase
Document Search

Note: <u>The Create Invoice widget allows users to create receipts, not invoices</u>. This is an out of the box widget name from Jaggaer that may not be edited by SHSU.

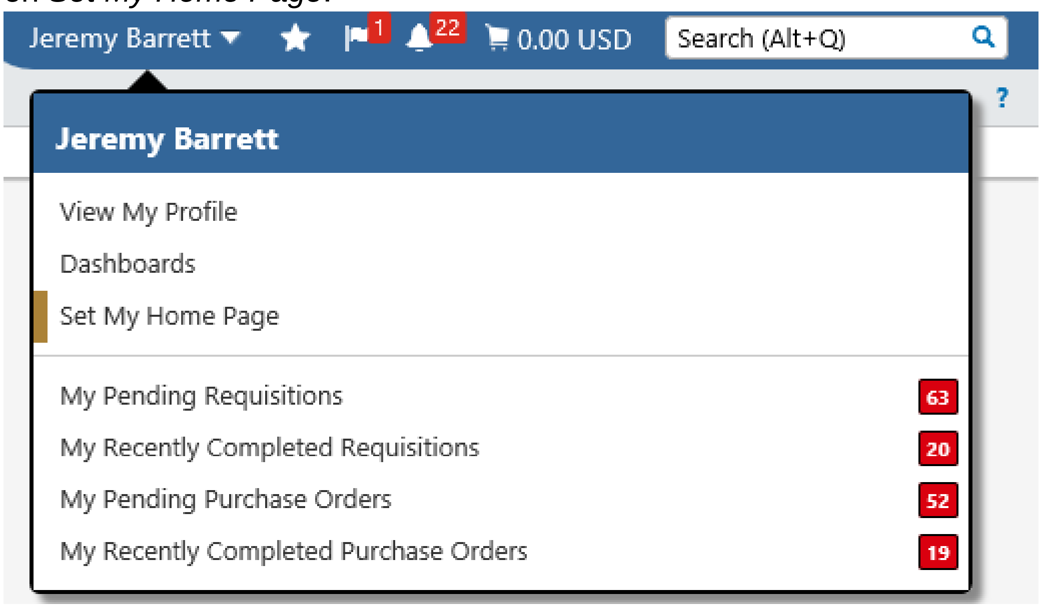
13. After everything is organized, you may save your changes by clicking on the blue *Save Changes* button. This will allow you to set your Dashboard as your homepage so everything is in one place.



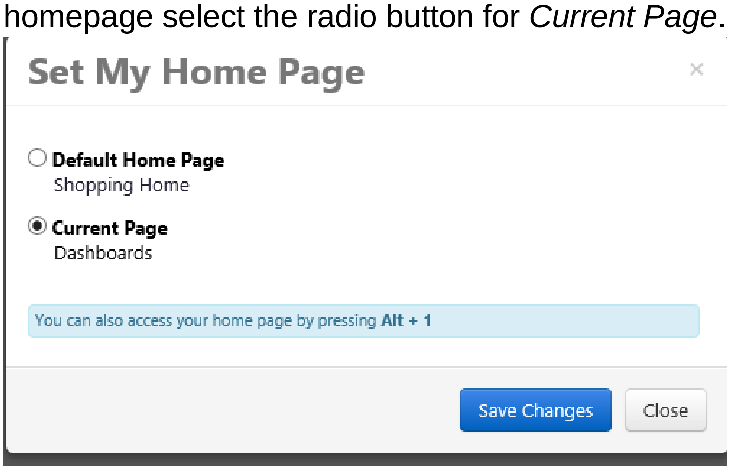
14. If you would like to go back and make changes after you have saved the Dashboard, go to the Dashboard Actions dropdown beside the Dashboard name and choose the Edit option. This will open the Dashboard up for additional changes. Once complete you will need to select Save Changes again.



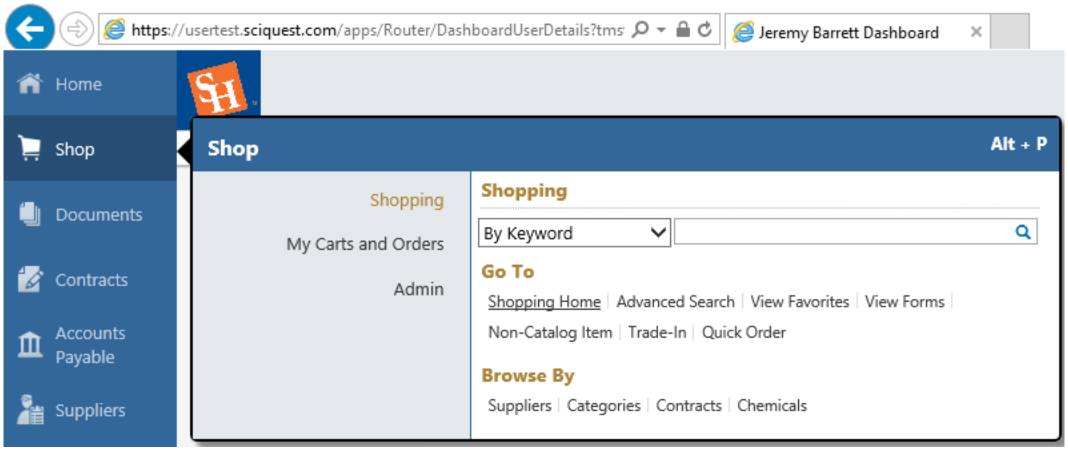
15. To set your homepage, click on your name at the top of the screen and then click on *Set My Home Page*.



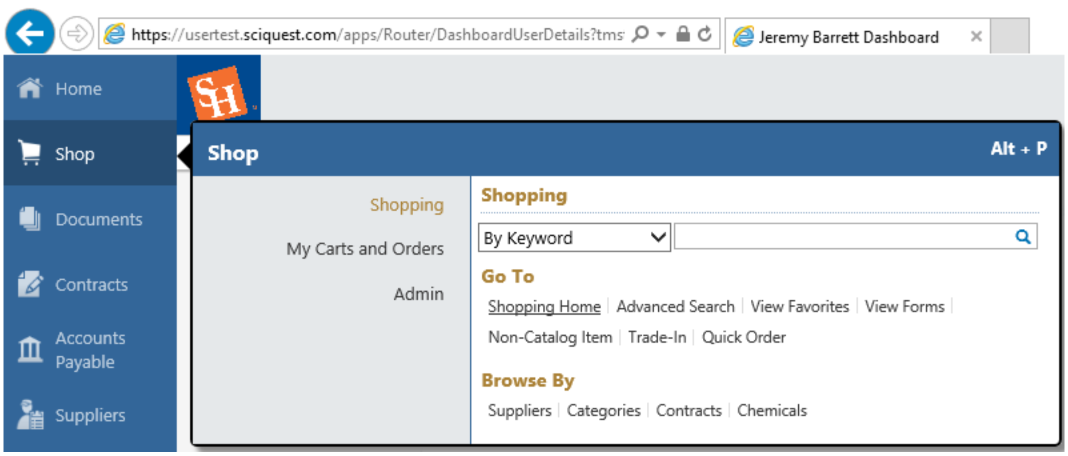
16. A pop up box will appear as shown below. To set your new Dashboard as your homepage select the radio button for *Current Page*. Then click on *Save Changes*.



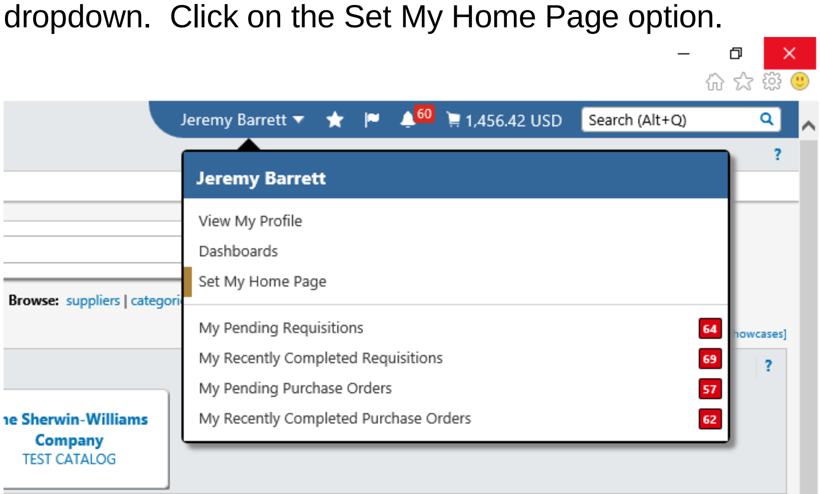
17. You can return to the original Dashboard at any time by clicking on the *Shop* button (Shopping Cart Icon) on the left hand side of the screen and clicking on the *Shopping Home* link under *Go To*.



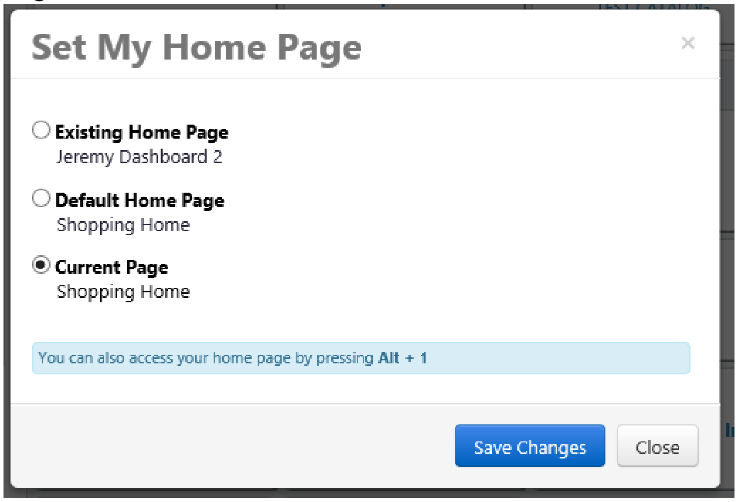
18. If you do not like the new Dashboard options once you create it and want to default the homepage to the original Dashboard simply go to the *Shop* button (Shopping Cart Icon on the left hand side of the screen and click on the *Shipping Home* link under *Go To*.



19. Once you are on the original Dashboard, go up to your name and click on the dropdown. Click on the Set My Home Page option.



20. A pop up box will appear. Ensure the Current Page radio button is selected and click on Save Changes. This will once again make the Shopping Home your home page.



21. The following is an example of a completed Dashboard.