Customizing the Dashboard

Set a default dashboard and create custom dashboards to personalize your workspace.
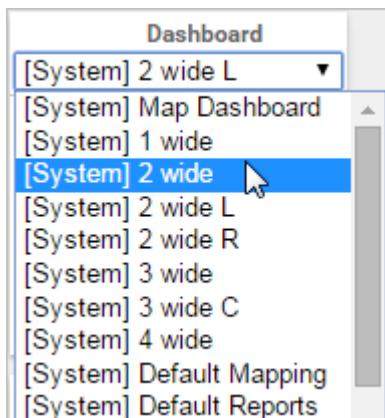
Setting a Default Dashboard

The default dashboard refers to the dashboard that appears whenever you log into the portal. Typically you'll want your default dashboard to be the one you use most often. The available dashboards to set as your default can be system dashboards (denoted by "[System]") or custom dashboards.

> **E X A M P L E**
> Tom prefers to see a two-column dashboard layout over a three-column layout on the dashboard.

▶ **To set a default dashboard**

1. From the Dashboard Control, click the drop-down arrow, and choose the dashboard you want to view. In Tom's example, we chose "[System] 2 wide."

   The selected dashboard appears.

1. From the Dashboard Control, click **Set as default**.

   A message appears to indicate that the selected layout is now your default dashboard. In Tom's example, the next time he logs into the portal, he will automatically see this two-column layout.

> **Note.** You can modify system dashboards, but changes are lost the next time you refresh the screen or log in unless you save them as a custom dashboard.

Saving a Custom Dashboard

Custom dashboards allow you to arrange different combinations of dashlets and save the layout for quick access. You can create as many custom dashboards as needed.
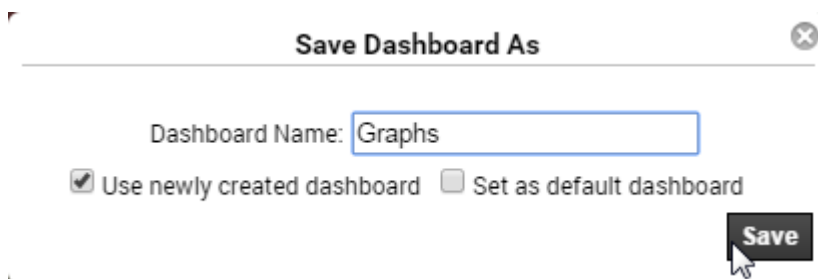
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> **E XAMPLE**
> Tom added several graph dashlets to his default dashboard and wants to save the layout for future use.
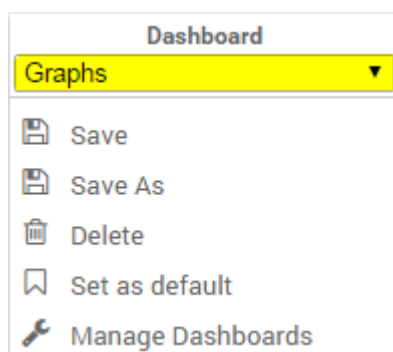
▶ **To save a custom dashboard**

1. From the dashboard layout, add and rearrange dashlets on the dashboard as needed.

   You can rearrange dashlets, close dashlets, or add more dashlets to a dashboard by simply dragging-and-dropping them on the screen or clicking the **Add** (⊞) or **Close** (⊠) icons.

1. From the Dashboard Control, click **Save As**.

2. In the Save Dashboard As window, enter a **Dashboard Name**. (Leave the option selected to use the dashboard immediately. Optionally set this new dashboard to be your default.)

3. Click **Save**.

Because we left the "Use newly created dashboard" check box selected, the new dashboard is automatically chosen as the current layout.

> 📋 **Tip!** Click "Manage Dashboards" to delete or change the name of a custom dashboard.
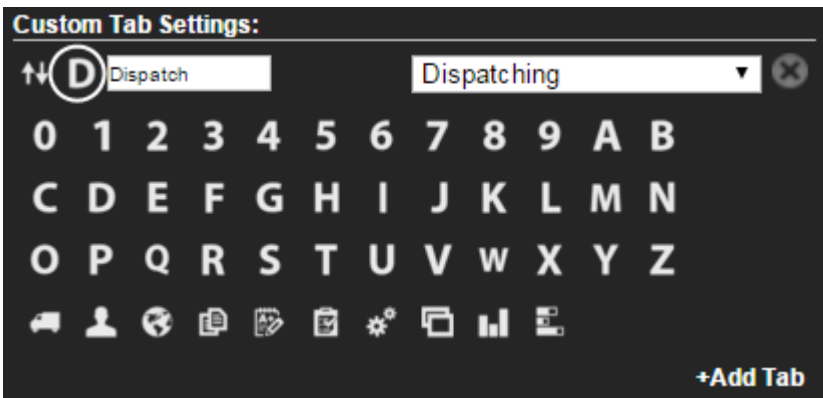
Adding a Custom Tab

Custom tabs appear as new items on the Menu Bar. Custom tabs allow you to quickly jump to your most-used dashboards without having to choose them from the drop-down in the Dashboard Control.

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> **EXAMPLE**
> Tom created several custom dashboards. He uses his "Dispatching" dashboard frequently and wants a quicker way to access it.
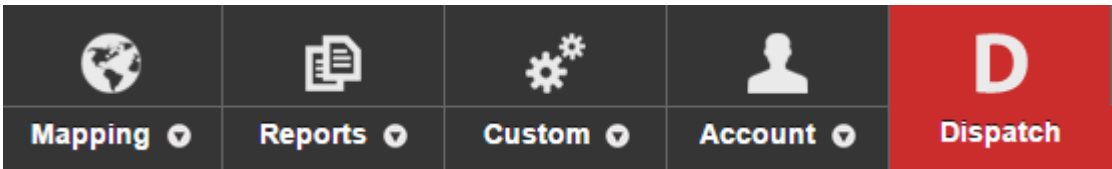
▶ **To add a custom tab**

1. From the right side of the Menu Bar, click **Change Tab Settings** (pencil icon).

2. In the Tab Settings window, from the Custom Tab Settings area, click **+Add Tab**.

3. Enter a new tab name, and then choose the dashboard you want to link to the tab. You can optionally click the "Custom" gears icon () to choose a different icon for the tab. In Tom's example, we chose "D" for Dispatch.

1. Click **Apply**.

   The new tab appears in the Menu Bar (click to view associated dashboard).

1. Click **Close** to close the Tab Settings window.

Adjusting Tab Settings

Expand the Tab Settings icon on the Dashboard to adjust static and custom tab settings.

Customizing the Dashboard

Setting	Description
Mapping	Specify the dashboard to display when clicking the button above the Mapping menu (if available)."
Reports	Specify the dashboard to display when clicking the button above the Reports menu (if available).
Custom	Specify the dashboard to display when clicking the button above the Custom menu (if available).
Account	Specify the dashboard to display when clicking the button above the Account menu (if available).
Hover mouse over menu bars to open	Specify to hover to expand a menu. If not selected, a mouse click is required.
Show drivers on vehicle menus	Specify to show drivers next to individual vehicle names in menus, such as reports. If not selected, driver names will not be shown in the drop-down.
Fixed menu when scrolling	Specify the units to display for distances and speeds. Available options are US Standard and Metric.
Enable scroll wheel map zoom	Specify to allow mouse scroll wheel to control the zoom when mouse focus is on a map. If not selected, scroll wheel focus will remain with the page.
Filter menu vehicles	Specify a filter group to use in menus, such as reports. The list of individual vehicles in the drop-down will filter by this group.