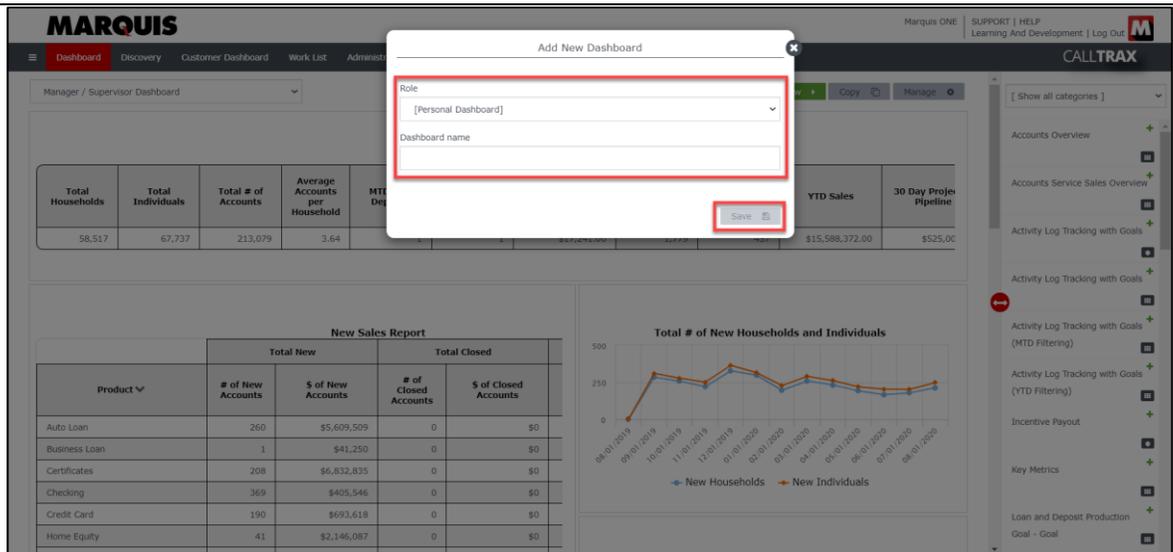


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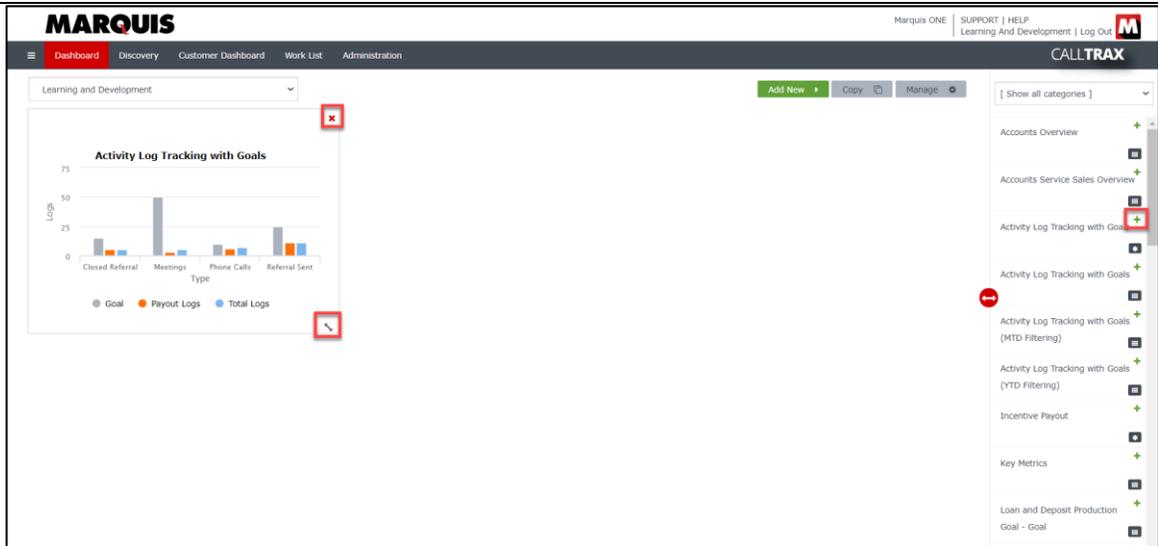
<b>CLTX102</b>	<b>CallTrax NEXT Managing Dashboards</b>
	The following procedures will guide through managing existing Dashboards within CallTrax NEXT.
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>CallTrax NEXT</b> .
<b>Step 2</b>	On the landing page, click on <b>Dashboard</b> from the main menu.
<b>Step 3</b>	To <b>Edit</b> an existing Dashboard's settings, click the drop-down arrow and select the desired Dashboard
3.2	Click the <b>Manage Dashboard</b> button located in the upper right hand corner
3.3	Click the drop-down arrow in the <b>Role</b> box to select a different role, if desired
3.4	Modify the <b>Name</b> , if desired
3.5	Make the desired changes and click <b>Save</b>



**Note:** The Dashboard Elements Report library is located on the right hand side of the Dashboard page. It will only display when any Dashboard other than the default Dashboards are selected and when the assigned role of the user has permissions to modify and add dashboards. Click on the red button on the center right of the page to expand and collapse the Dashboard Elements library.

<b>Step 4</b>	To <b>add a report</b> to the Dashboard:
4.1	Click the drop-down arrow in the <b>Category</b> box in order to isolate the list to display only those reports within a Dashboard Elements Category (optional)
4.2	Locate a report within the list and click the <b>plus symbol</b> to place it in the dashboard
<b>Note:</b> In order for a report to be available in the list, it will need to be published within the Dashboard Elements. To review the steps for publishing a report, please review the Publishing Reports procedural document.	
<b>Step 5</b>	To <b>resize</b> a report, hover the mouse in the bottom right hand corner of the report widget, click and drag to the desired location
<b>Step 6</b>	To <b>move</b> the report to the desired placement within the dashboard, click in the middle of the report widget, hold and drag to the desired location within the dashboard
<b>Step 7</b>	To <b>remove</b> a report from the dashboard, click on the <b>X</b> located in the upper right hand corner of the report widget.

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**Note:** There is no Save button as the changes made will occur immediately and retain automatically. There is also no undo button so if a report is removed, it will need to be added back using the steps above.