# Home Tab

The Home tab is a personal space where users define system preferences, access and create home pages, dashboards and combined or summary reports, as well as change profile information. The following is an overview of each Home tab feature.

## Home Page

The Home Page is a customizable dashboard-style view that users can configure to launch all of the actions of interest to them immediately upon log-in and displays relevant charts and reports. Users can see high-level overviews of actionable information and quickly assess needed action. Internal hotlinks can be added to the home page to give direct creation access to records in any table, views of any saved searches on any tables, etc. The home page is typically set in advance by the system administrator to automatically display a default home page template; however, users may have permissions to create or select different templates as the home page from the Preferences tab. Home pages are created from widgets and the following kinds of widgets are supported: charts, dashboards, internal hotlinks, table views with Saved Search applied, Google gadgets, embedded webpage or images, and text.

## Dashboards

The Dashboards feature allows any number of reports from any selection of tables to be combined into a single view, which is highly valued when a user needs an overview of operations at a single glance. Dashboard functionality includes:

* Creation of any number of dashboards
* Modification and deletion of any of the dashboards a user has created
* Display of any dashboard and report
* Drill-down into reports
* Distribution of dashboards via email

## Summary/Combined Reports

The Summary/Combined Reports tool allows users to select multiple reports to run and produce a single spreadsheet. Users can edit this spreadsheet and add additional pages that contain entities such as pivot tables and charts, which are then populated with the new data when the combined report is re-run.

* *This tool has not been fully developed, so it is recommended that users not utilize this feature until informed otherwise.*

## My Profile

The My Profile feature displays the user’s employee record information and allows users to change their login password.

## Preferences

The Preferences tool allows users to customize the behavior of some system-wide features like popup messages and windows, ADA/Mobile settings and left navigation pane display options.

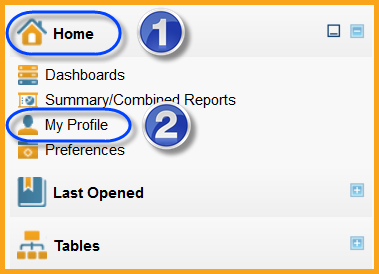
## Exercises

The following exercises are related to features available in the Home tab of the ContractManagementtm system.

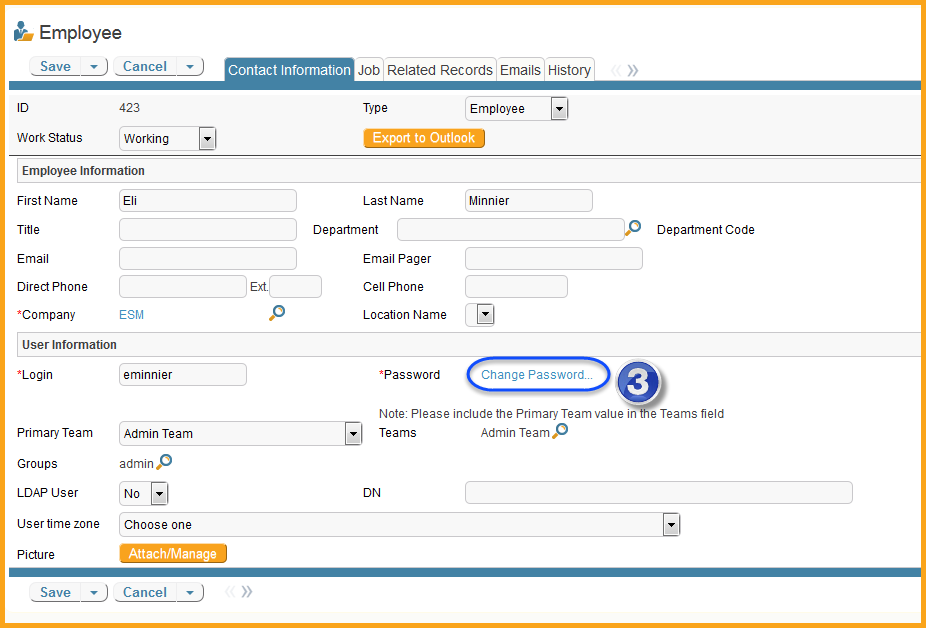
### Change Password

The purpose of this exercise is to practice changing your password for the ContractManagementtm system.

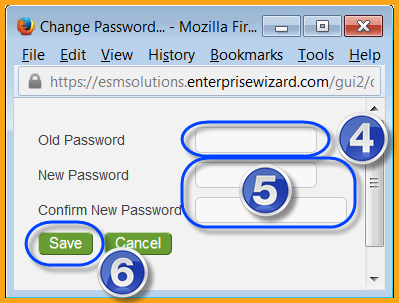
1. Select the **Home** tab in the left navigation pane.
2. Select the **My Profile** option under the **Home** tab.



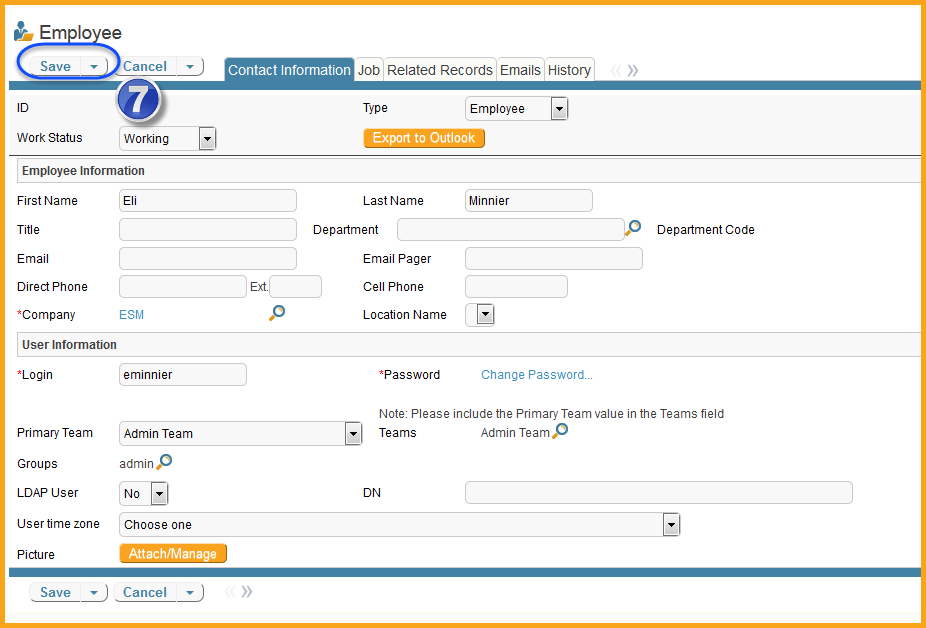
1. In the right functional pane, select the Change Password link in the User Information section of the **Contact Information** tabin the **Employee** form.



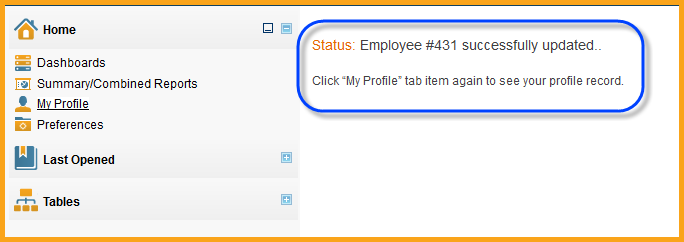
1. In the new window that appeared, enter your old password.
2. Then enter your new password and confirm it.
3. Select the **Save** button.



1. On the **Employee** form, select the **Save** button. This exercise is complete.



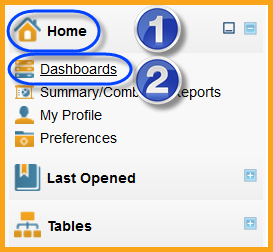
***Note:*** *The successful completion of changing your password will result in a* ***Status*** *message appearing in the right functional pane confirming the change and prompt you to select the* ***My Profile*** *option on the Home tab menu to return to your profile record.*



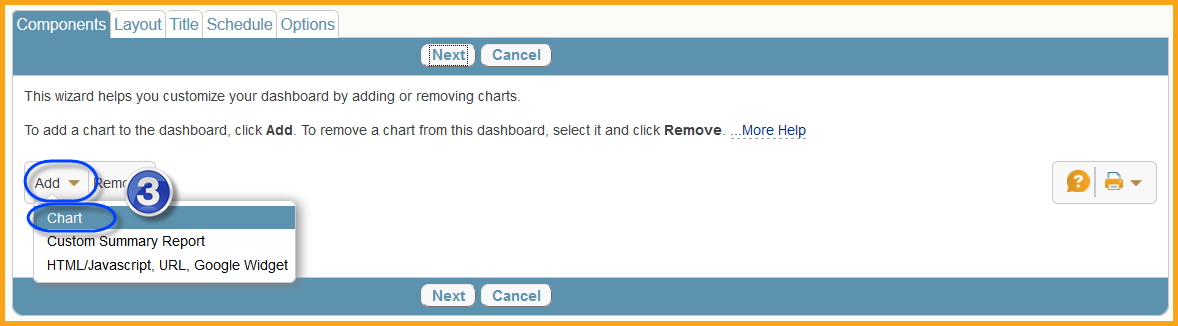
### Create a Dashboard

The purpose of this exercise is to practice creating a new personal dashboard for the ContractManagementtm system.

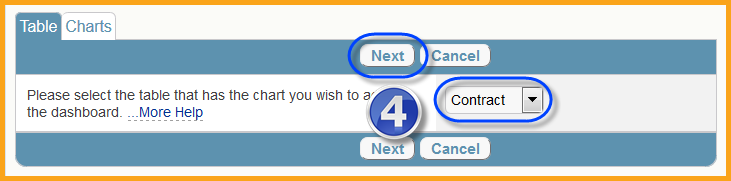
1. Select the **Home** tab in the left navigation pane.
2. Select the **Dashboards** option under the **Home** tab, and then select the New option.



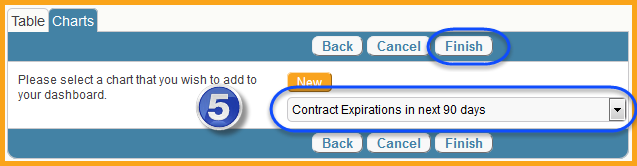
1. In the right functional pane, mouse over the **Add** button and select the **Chart** option from the drop-down menu on the **Components** tab.



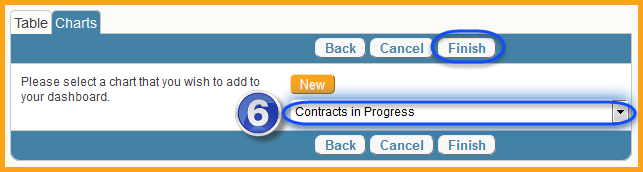
1. In the new pop-up window that opens, leave the default table selection of **Contract** in the **Table** tab and select the **Next** button.



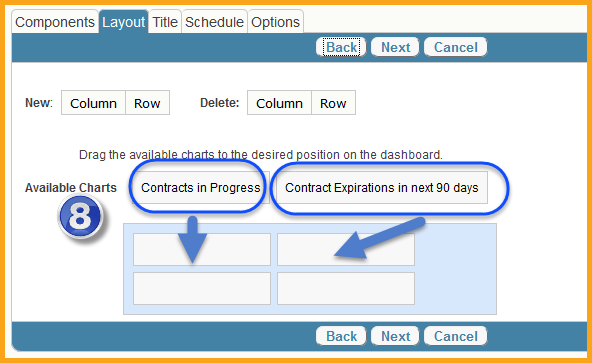
1. On the **Charts** tab, select the **Contract Expirations in the Next 90 Days** option form the drop-down menu and select the **Finish** button, or any other chart that is available to you.



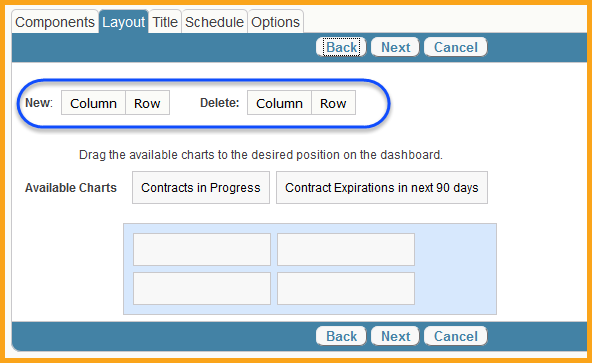
1. Repeat steps 3-5 above, but select the **Contracts in Progress** option, or any other chart that is available to you, then select the **Finish** button on the **Charts** tab.



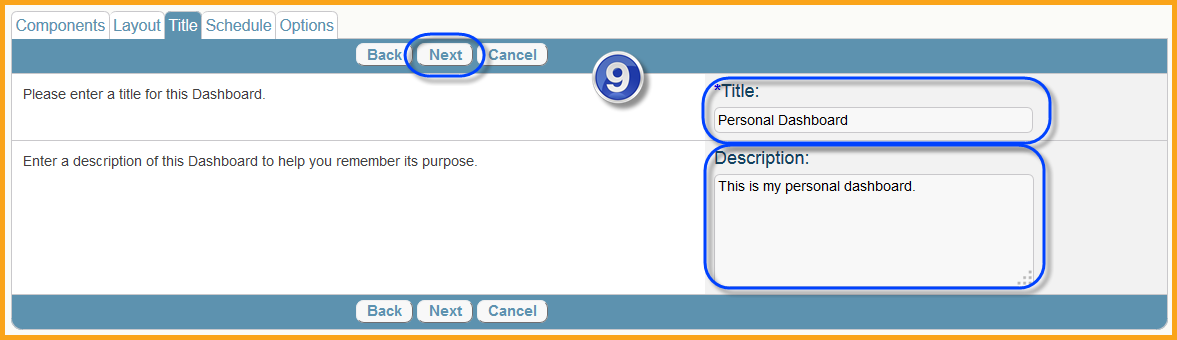
1. On the **Components** tab, select the **Next** button.
2. On the **Layout** tab, drag and drop the **Available Charts** to one of the positions available and select the **Next** button.



* *Additional columns and rows can be added or existing rows and columns can be deleted using the* ***New*** *and* ***Delete******Column*** *or* ***Row*** *buttons at the top of the* ***Layout*** *tab.*

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1. On the **Title** tab, enter **Your Own Name** in the **Title** field and your desired description of this tab in the **Description** field (which charts are displayed), then select the **Next** button.

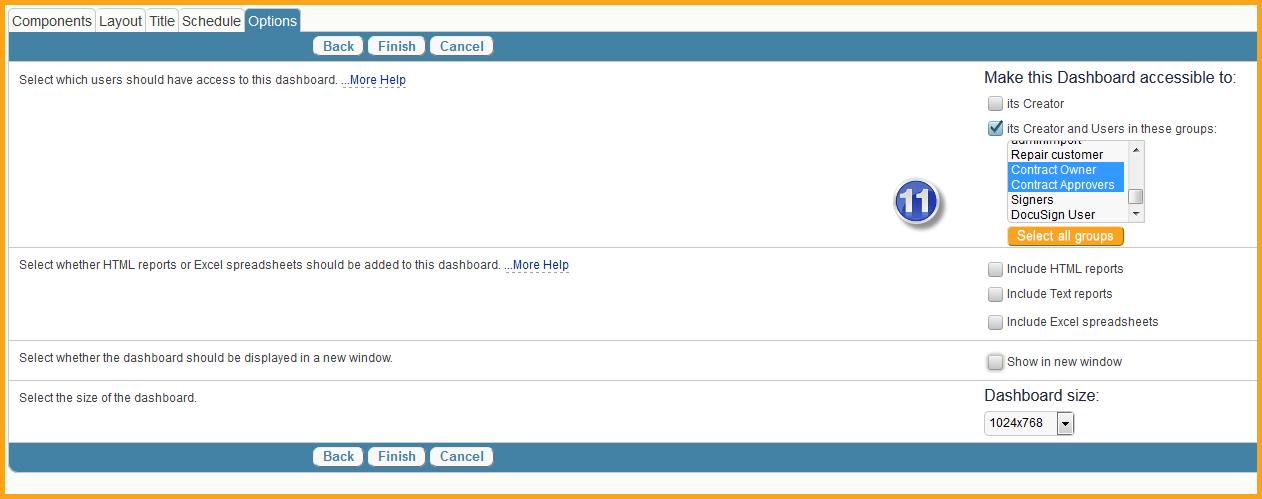


1. On the **Schedule** tab, select the **Daily including weekends** option under **Run this Dashboard**, and then select the **Next** button.

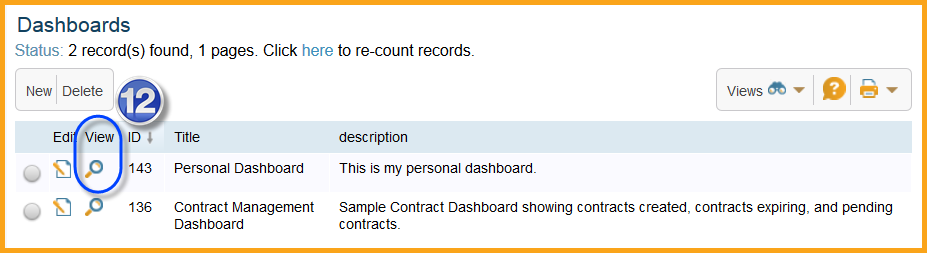


* *The dashboard run time can be left as 12AM and if it is change, it should be set to a time when the system is not heavily used to prevent affecting system performance. Only select the* ***Email*** *option under* ***Distribute Dashboard via*** *if you want the dashboard information sent to you by email. You will not be able to use the* ***Write to disk*** *option.*

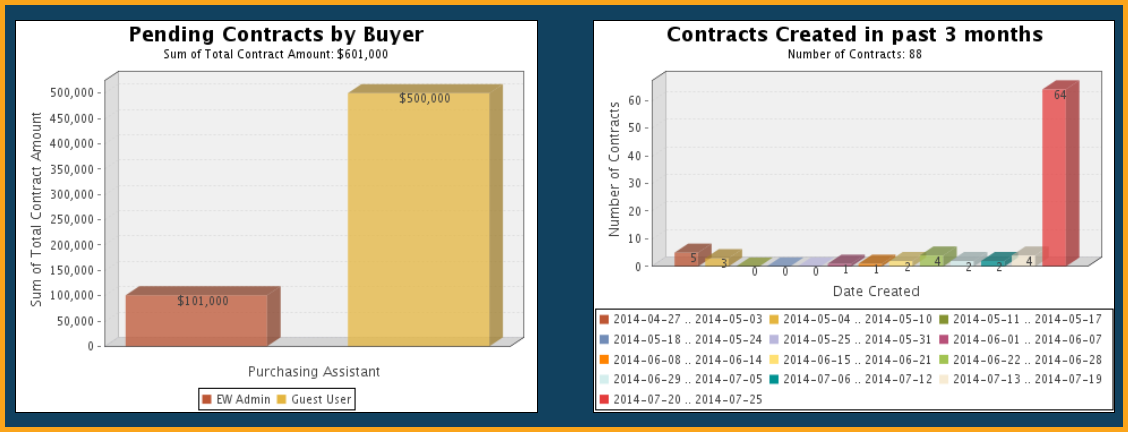
1. The **Options** tab allows you to share the dashboard and affect how it is displayed. Leave the default setting of **its Creator and Users in these groups** and select the **Contract Owner** and **Contract Approvers** groups in the Make this **Dashboard accessible to** section, then deselect the **Include in HTML reports** and **Show in new window** options, the select the **Finish** button.



1. On the **Dashboards** list, select the **View** icon for the **Personal Dashboard** just created to view this dashboard.



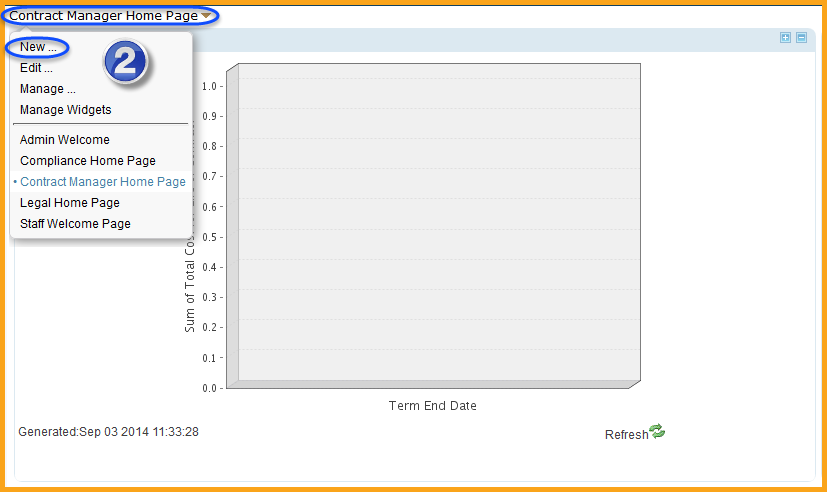
The dashboard should appear similar to the following image.



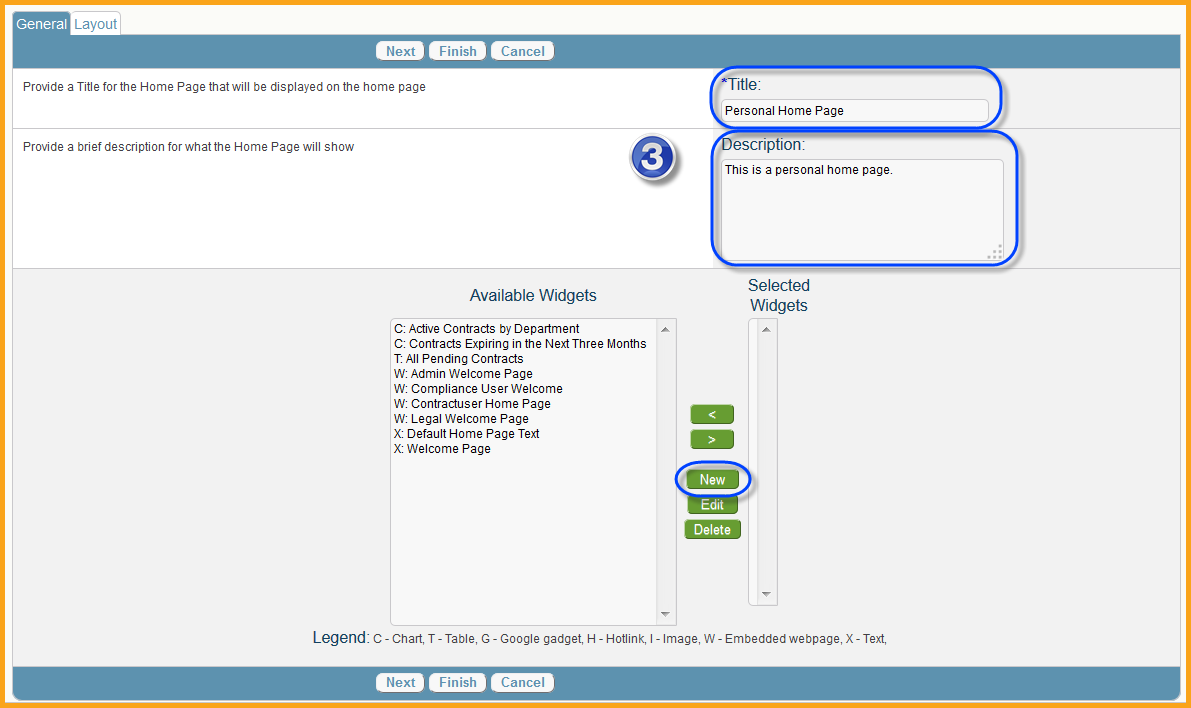
### Create a Home Page

The purpose of this exercise is to practice creating a new home page for the ContractManagementtm system.

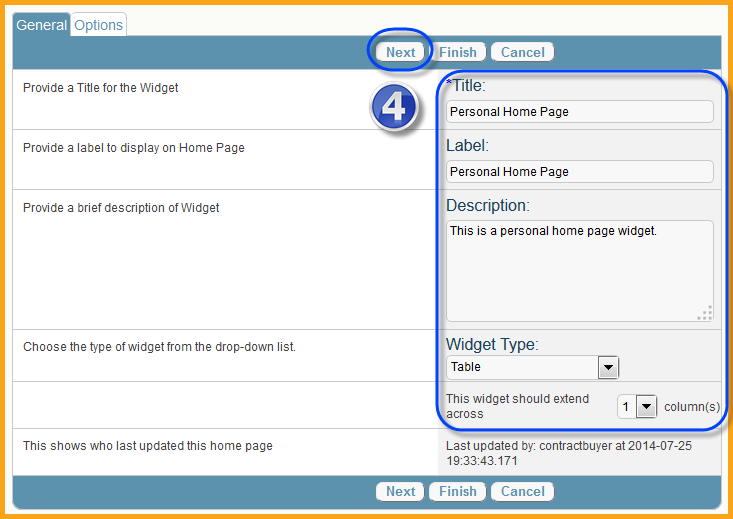
1. Select the **Home** tab in the left navigation pane.
2. Mouse over the **Contract Manager Home Page** title in the right functional pane and select the **New** link.



1. On the general tab, enter **Your Name** in the **Title** field along with a description of the home page in the **Description** field, then select the **New** button in the **Available / Selected Widgets** section.



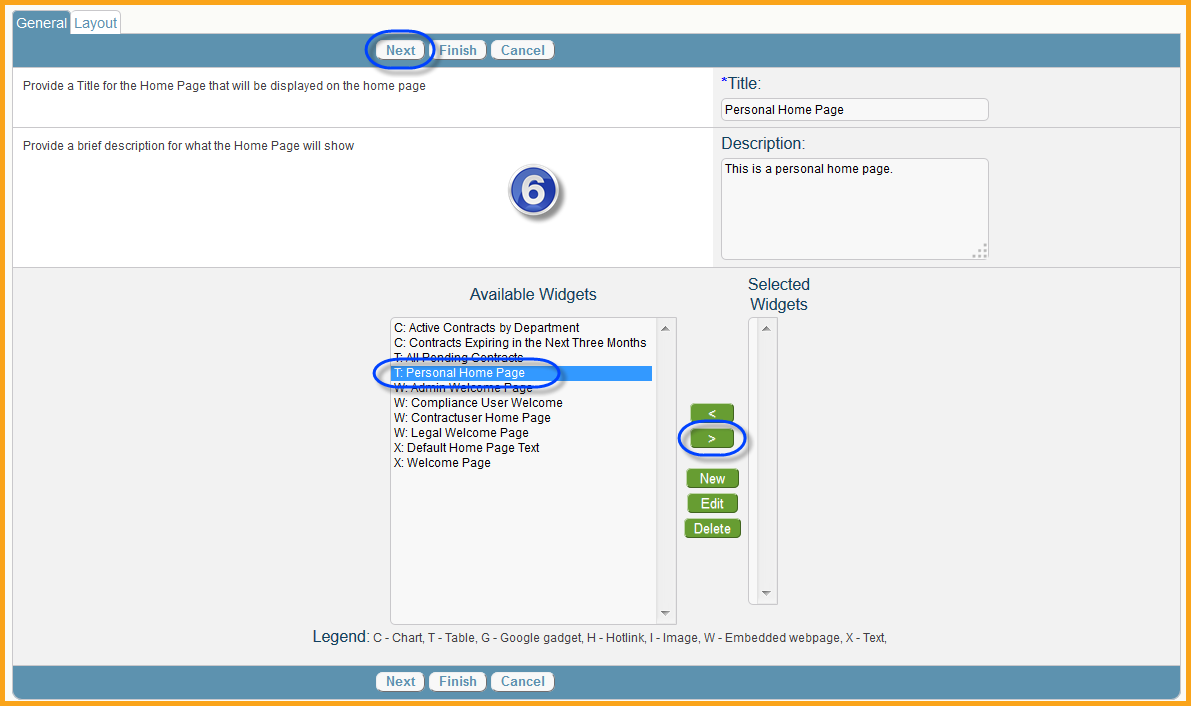
1. In the new pop-up window, in the **General** tab, enter **Your Name Home Page** in the **Title** field, **Your Name Home Page** in the **Label** field, a description of the widget in the **Description** field. Leave the default selections of **Table** for **Widget Type** and **1 column** for **This widget should extend across**, then select the **Next** button.



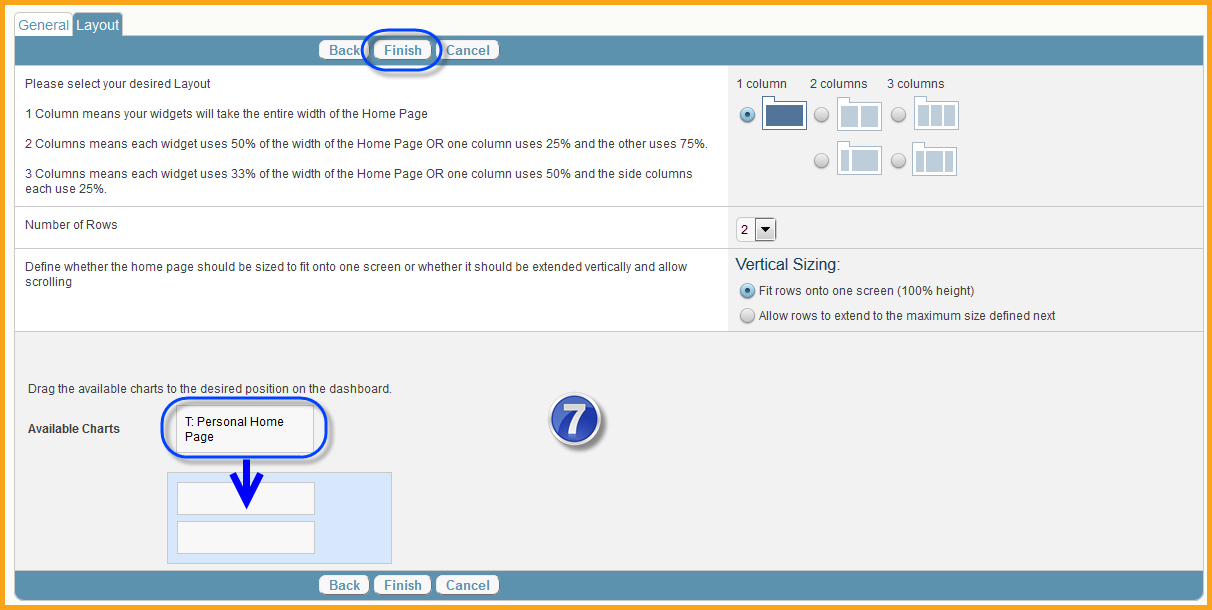
1. On the **Options** tab, select the **Contract** option in the **Table** field, the **My Contracts** option in the **Search Condition** field and leave the rest of the fields a the default options, then select the **Finish** button.



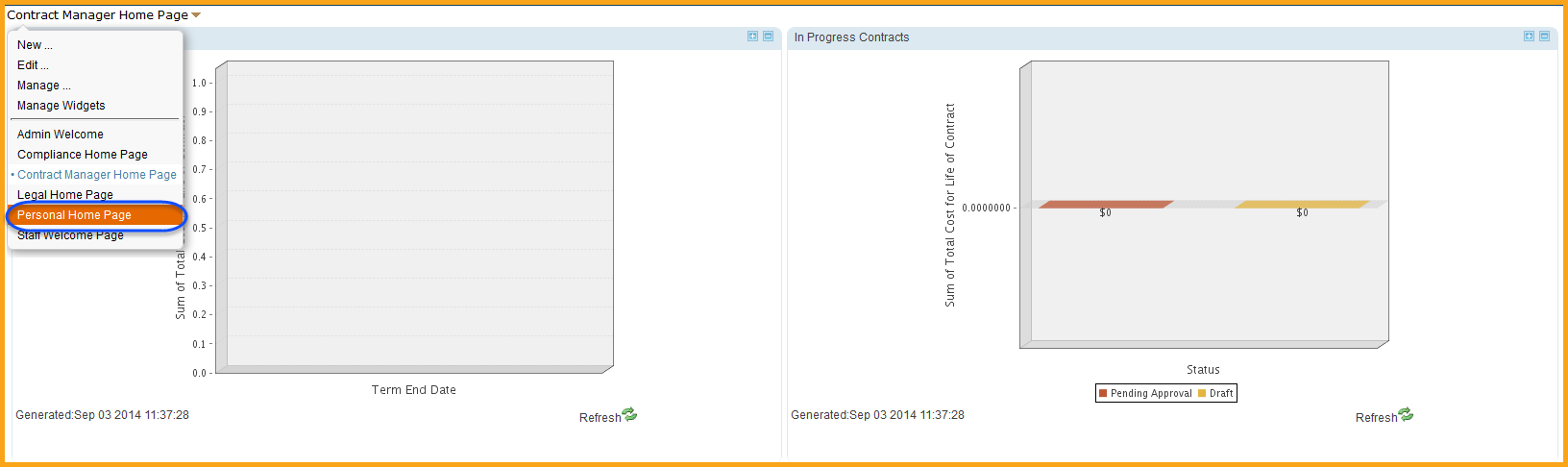
1. Back on the **General** tab, select the newly created widget from the **Available Widgets** menu and select the right arrow button to move it to the **Selected Widgets** menu, and then select the **Next** button.



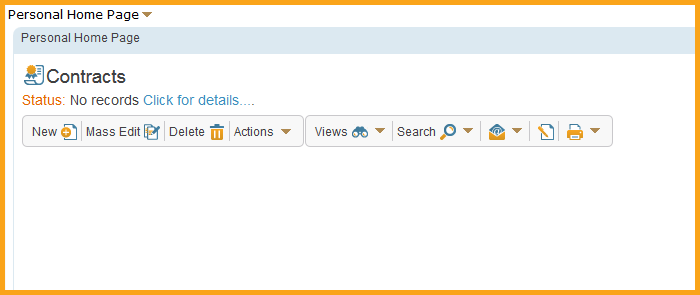
1. On the **Layout** tab, drag and drop the new widget in the **Available Charts** section to the desired location, leaving all other default options selected, then select the **Finish** button.



1. Mouse over the **Contract Manager Home Page** title in the right functional pane and select the option for the newly created **Your Name Home Page.**

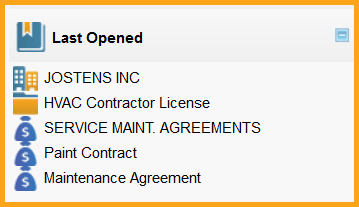


The home page should appear similar to the following image.



# Last Opened Tab

The Last Opened tab allows users to quickly navigate to one of the last 5 recently viewed records or documents, such as a Purchasing Agreement or Contract, Document, Employee or External Party contact record.



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