PowerSchool
Powering Brighter Futures

20.11 Personal Dashboards

Creating Personal Dashboards

Customization of the Personal Dashboard

It is necessary to enable Edit mode 📝 to add Components to the Dashboard

BSI Administrator's Personal Dashboard

BSI Administrator's Personal Dashboard Administrator Human Resources Building User Accounts Payable Accounts

Components

There are three types of components that can be added to the Personal Dashboard.

- Links
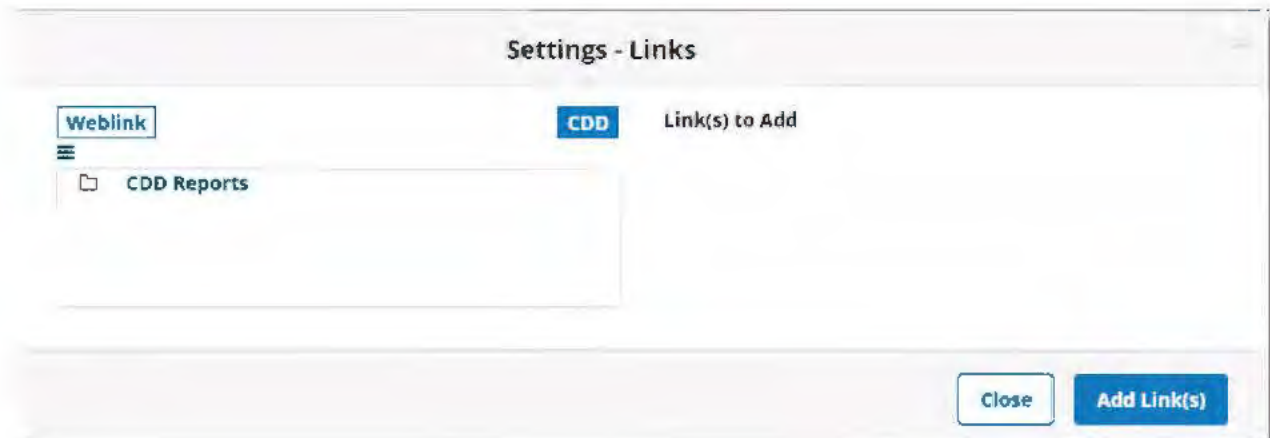- Job Monitor
- Tasklist
- CDD Folder Components

Add Component

- Links Component
- Job Monitor Component
- Tasklist Component
- CDD Folder Component

Close   Add

Adding **Links**:
1. Click ✚ to Add a New Component.
2. Click the radial button for "Links Component" on the pop-up.
3. Click "Add."
4. Select the links to add to the component. You can add multiple links at one time.
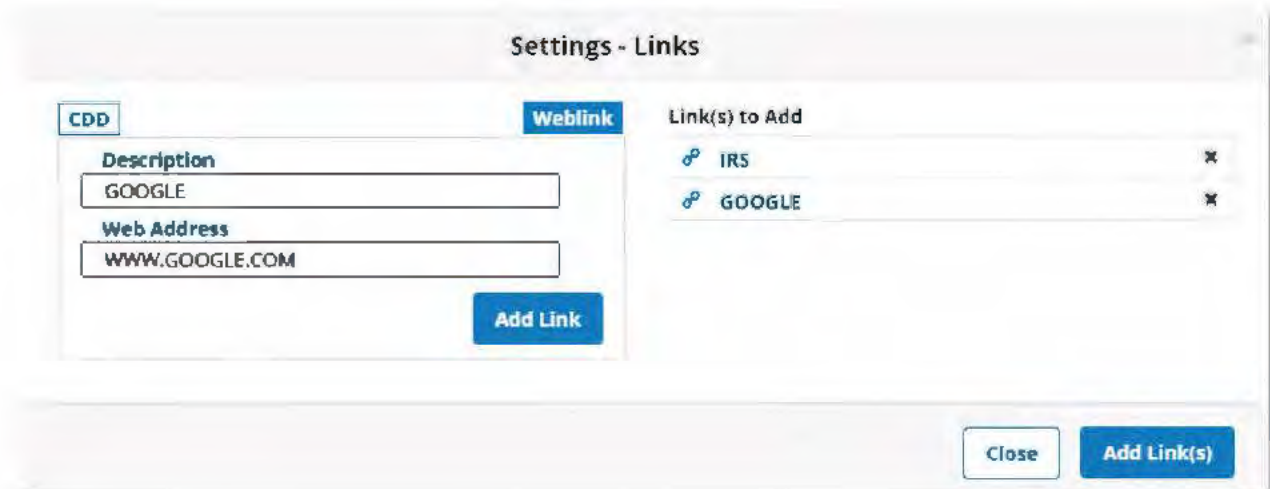

Settings - Links

Weblink   **CDD**   Link(s) to Add
≡
   📁   **CDD Reports**

                                                          Close   **Add Link(s)**

Settings - Links

CDD   **Weblink**   Link(s) to Add
   Description   🔗   IRS   ✖
   GOOGLE   🔗   GOOGLE   ✖
   Web Address
   WWW.GOOGLE.COM
                                          Add Link
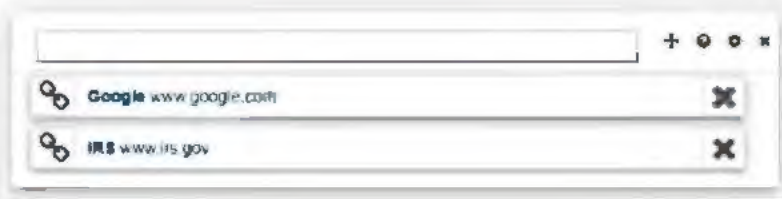
                                                          Close   **Add Link(s)**

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5. Click "Add Link(s)" to insert the new Links component with the selected links.
6. Type a title for the Component if desired

7. Click 💾 to Save the dashboard changes.

To add links to an existing Links component, place the dashboard in Edit mode ✏️ , and either use the "Add New Component" dashboard edit option ⊕ or the "Configure" component edit option ⚙️ to add more links.

A blank Links component can be created to serve as a placeholder for future links, such as data entry screens or reports. To insert a blank Links component, enable Edit mode, select "Add new component," select "Links Component," click "Add," then, without any links selected, click "Add Link(s)." A Links component is created with a "No authorized links" message.
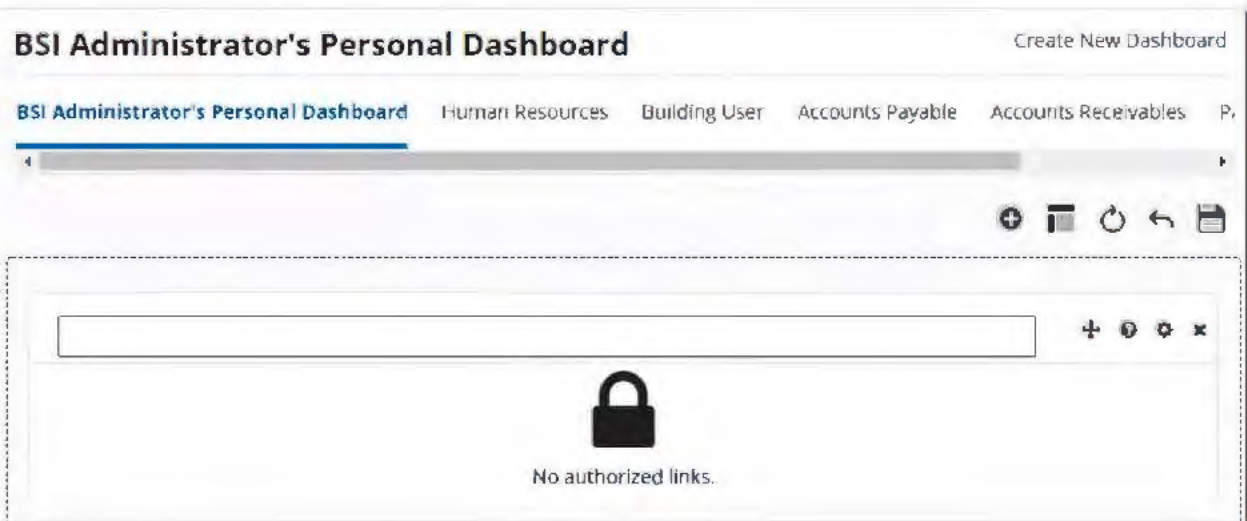
The **Task List** and **Job Monitor** components are standard components and cannot be customized. A title for the component can be entered while in edit mode.

BSI Administrator's Personal Dashboard

PR Approval (1)
SI Approval (1)
Refreshed at Wednesday, August 21, 2019 6:36:23   Out of Office

Go to Jobs Archive

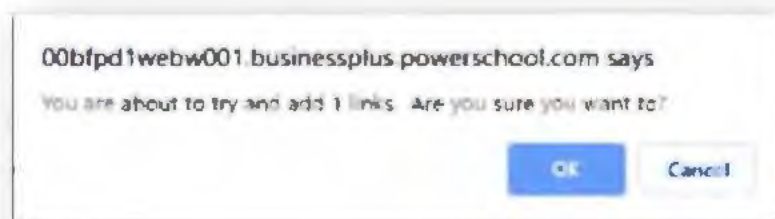| Desc	Job #	Status	Start	End	Type
Job: PYUTRCSP	220967	In Progress	2/1/2021 5:56:50 PM		Job
GlobalProcessEmpmstr: HREMEN	220966	Completed	2/1/2021 5:55:37 PM	2/1/2021 5:55:40 PM	Tool Execution
GlobalProcessEmpmstr: HREMEN	220965	Completed	2/1/2021 5:54:32 PM	2/1/2021 5:54:39 PM	Tool Execution
Job: NUUTNU	220960	Failed	2/1/2021 8:55:52 AM	2/1/2021 8:55:54 AM	Job

1 - 4 of 4 items

Refreshed at Monday, February 1, 2021 7:56:46   Your Jobs

BusinessPlus Menu Links

In Dashboard Edit mode, BusinessPlus folders, individual pages and reports can be dragged and dropped from the left navigational menu into blank or existing link components.   A notification will appear indicating the number of links to be added.

00bfpd1webw001.businessplus.powerschool.com says

You are about to try and add 1 links. Are you sure you want to?

OK   Cancel

Editing Links

Links can be rearranged by selecting the link in Edit mode and moving it within the Links Component. Use the X on the right-hand side of the link to delete it.
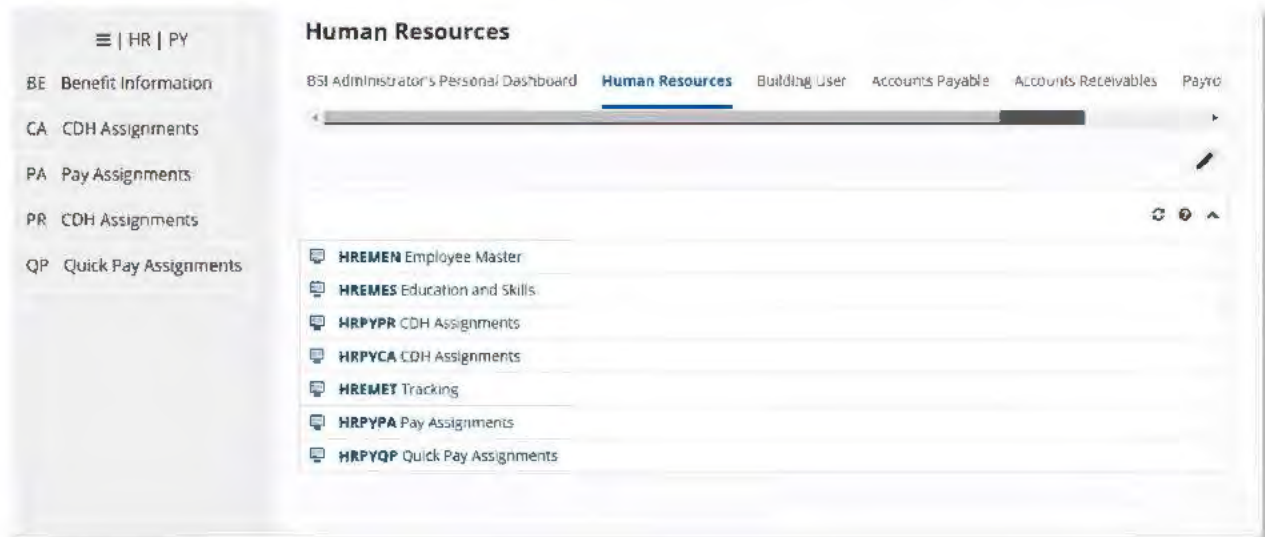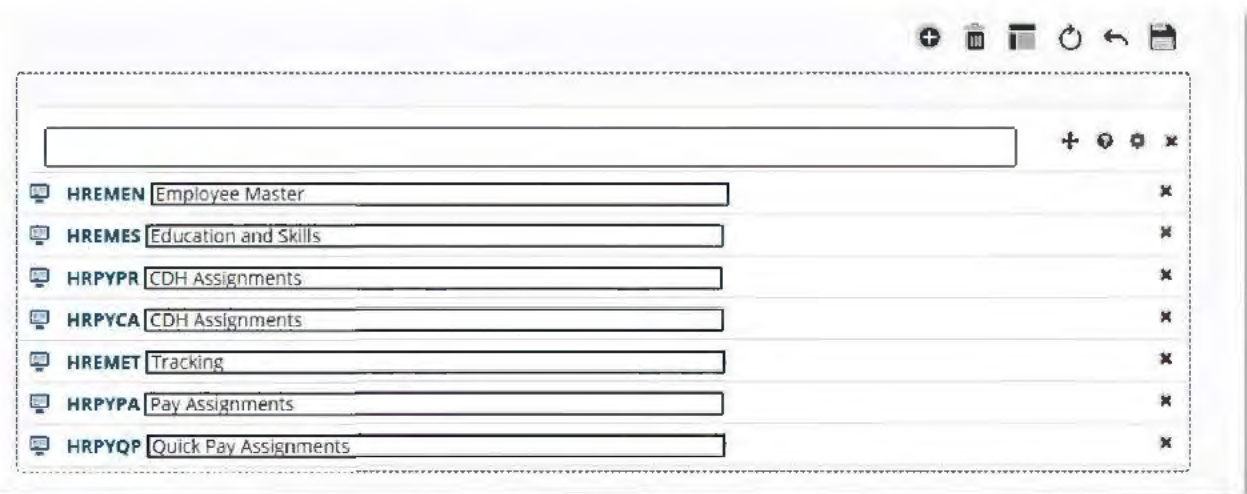

Layout

To change the layout of the personal dashboard:

1. Enable Edit mode 🖊
2. Click "Select Layout" 🔲
3. Select one of the six default layouts. Note that the Personal Dashboard Title can be edited here.

4. Click "OK"
5. If needed, use the Move tool ✛ to rearrange components within the new layout.

🖥 **HREMEN**	Employee Master	✕
🖥 **HREMES**	Education and Skills	✕
🖥 **HRPYPR**	CDH Assignments	✕
🖥 **HRPYCA**	CDH Assignments	✕
🖥 **HREMET**	Tracking	✕
🖥 **HRPYPA**	Pay Assignments	✕
🖥 **HRPYQP**	Quick Pay Assignments	✕

6. Click Save Changes

Personal Dashboard Controls

Edit Dashboard

Symbol	Name	Description
✎	Enable Edit mode	Selecting this symbol displays the Edit functions
↺	Undo Changes	Exit Edit mode without saving changes
◀◀	Revert Changes	Reset layout to original
💾	Save Changes	Save changes made to the dashboard
⚙	Select Layout	Opens the Task Center Details window to update dashboard layout and name
🗑	Delete	Delete current workspace
+	Add New Component	Opens the Add Component window where the user can select to add a Links, Job Monitor or Task List component. If Links Component is selected, the Links Settings page opens from which the user can select to add Weblink, CDD or Cognos links.

Edit Components

	Symbol	Name	Description
Browse Mode	^	Collapse	Collapse component content
	⌄	Expand	Expand component content
	❓	Help	Displays component information
	⟳	Refresh	Select to refresh component
Edit Mode	✕	Remove	Remove the component
	⚙	Configure	Opens the Links Settings page to add links (on Links components only)
	+	Move	Click and drag the Move symbol to move the component to a new location
Links	✖	Remove Link	Removes an individual link
Job Monitor	⬤▬	Show Your/All Jobs	Toggle display of jobs launched by current user or all users. Selecting a job expands Job Details and Attachments sections.
	✕	Cancel Job	This symbol appears next to the Status field to cancel a job. Note that classic jobs can only be cancelled if in "WF" or "In Progress" status. Workflow and BT70 jobs cannot be cancelled if in "In Progress" status, and CDD jobs can only be cancelled if the GUI-ID has been created for the report.
	◦ ⬤ ◦	Page Controls	Used to browse jobs