

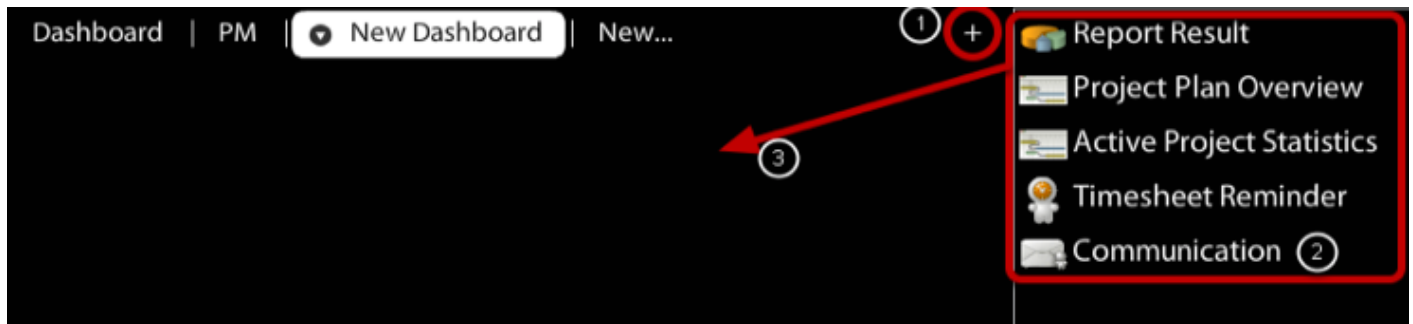
Dashboard

- [Set-up Dashboard](#)
- [Welcome Widget](#)

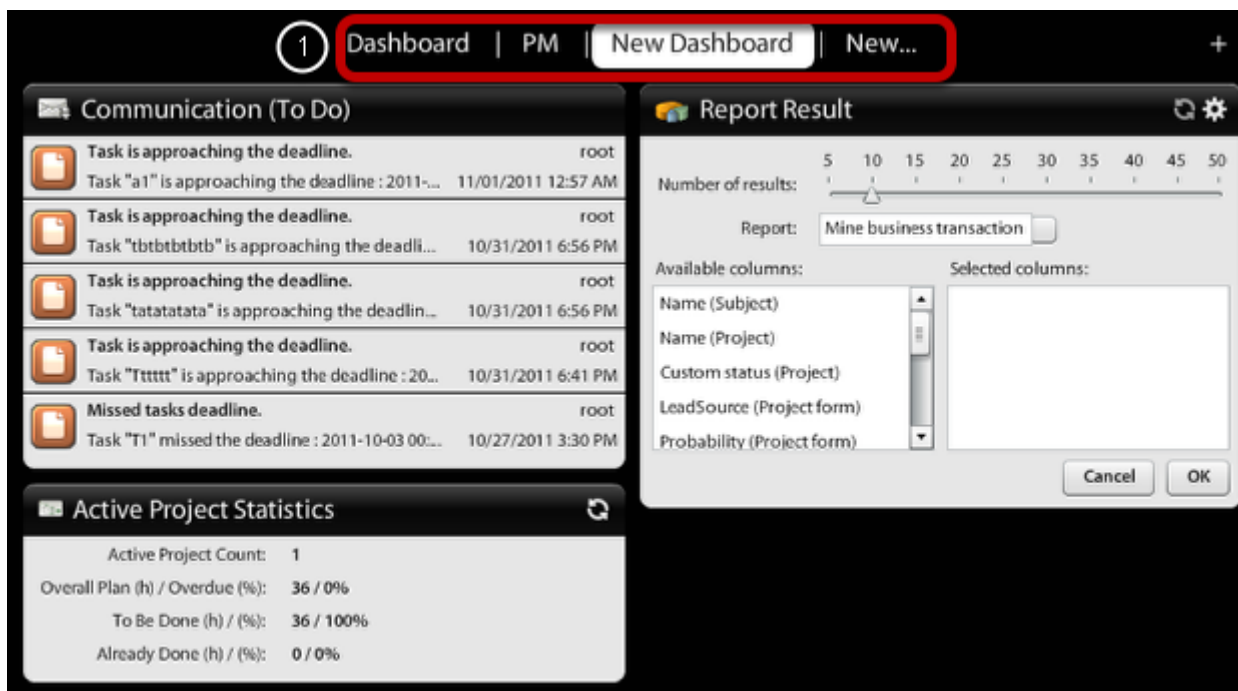
Set-up Dashboard

How to Add/Remove Dashboard Widgets?

It is quite easy! Follow this manual:

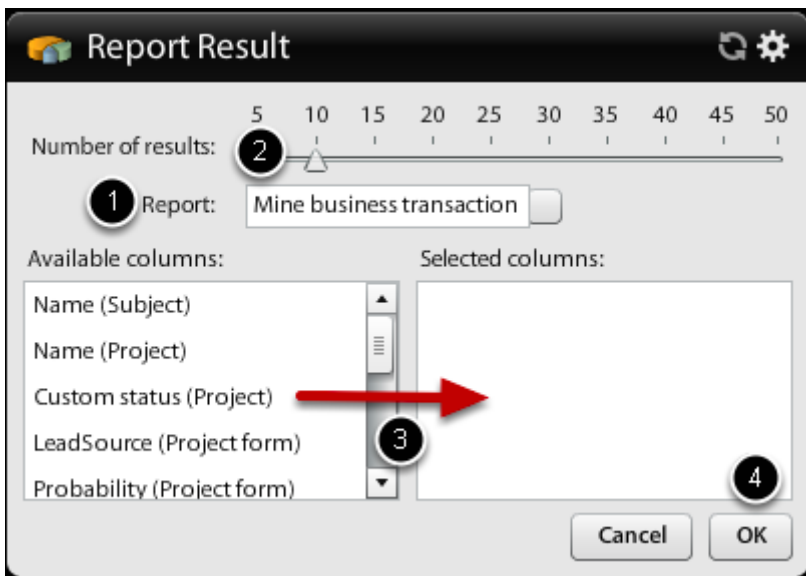


- After you **click on plus (1)** you'll get **widget menu on right side (2)**. Choose widgets you would like to have on your dashboard, **drag&drop them into Dashboard (3)**.



How to Adjust Report Widget?

- You can even create more dashboards for different needs (f.e.marketing dashboards, sales, project planning, etc.)
- You can switch them by using **top menu (1)**



- Setup Report Results

1. choose report (create special ones)
2. setup how many results you want to see
3. drag&drop columns you want to see
4. click on OK



- You can see all your widgets including report results on your dashboard

How to adjust Dashboard for the whole organization?

Users that are authorized to update Organization settings (usually Admins or Power Users) can set-up home screen of Dashboard for the whole company. Using dashboard switch on home page you can show settings of **Organization Widgets** & update them (Add/Remove Dashboard widgets for the whole Organization).

- 1.) Click on (+) icon on Dashboard top menu
- 2.) Click on (>) drop-down icon next to Dashboard top menu & switch to **Organization Widgets**
- 3.) Adjust any widgets (add/remove) that are displayed for the whole organization

Dashboard | New...

My sales opportunities

| Name | Name |
|----------------------------------|--------------------|
| Daily News | Story Selling |
| Bonner Springs-Edwardsville Chie | SO: System Support |
| Acme Corporation | Sales opportunity |
| Acme Corporation | OP INVENTORO XYZ |
| Superstars.co.uk | Sales opportunity |
| Superstars.co.uk | Sales opportunity |
| Acme Corporation | SO: Training |
| Acme Corporation | SO: Seminar |

Upcoming presentations

No result.

Recent Sales Opportunities

| Name | Name |
|----------------------------------|--------------------|
| Acme Corporation | SO: Training |
| Acme Corporation | SO: Seminar |
| Acme Corporation | Sales opportunity |
| Acme Corporation | OP INVENTORO XYZ |
| Bonner Springs-Edwardsville Chie | SO: System Support |
| Daily News | Story Selling |
| Superstars.co.uk | Sales opportunity |
| Superstars.co.uk | Sales opportunity |

Communication (To Do)

| | |
|---------------------------------------|----------------------------------|
| Task is approaching the deadli... | root |
| Task "Please solve request." is ap... | 07/10/2012 11:01 AM |
| Task is approaching the deadli... | root |
| Task "New Task" is approaching... | 06/04/2012 11:28 AM |
| Re: Estimate | Luke Perry <perryluke33@gmail... |
| Hey, thx. | 05/06/2012 12:09 AM |
| Notification: Info | Admin Joe |
| | 05/05/2012 8:21 PM |
| Task is approaching the deadli... | root |
| Task "Prepare proposal for Cons... | 06/30/2010 12:27 PM |

Report Result

Project Plan Overview

Active Project Statistics

Communication

Timesheet Reminder

Welcome Widget

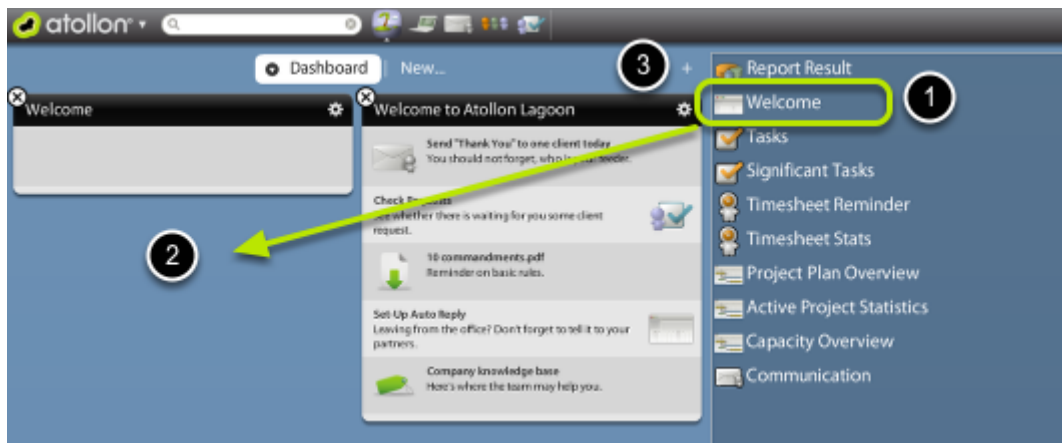
Create intranet for your employees in minutes. Atollon Lagoon Welcome widget helps you help your employees & other users focus on the most important activities.

Atollon Lagoon Welcome Widget allows you to:

Add any link(s) on the user's dashboard:

- shortcut to Atollon Lagoon application
- shortcut to application's function
- shortcut to any Atollon Lagoon settings
- link to external URL
- shortcut to download/open internal document

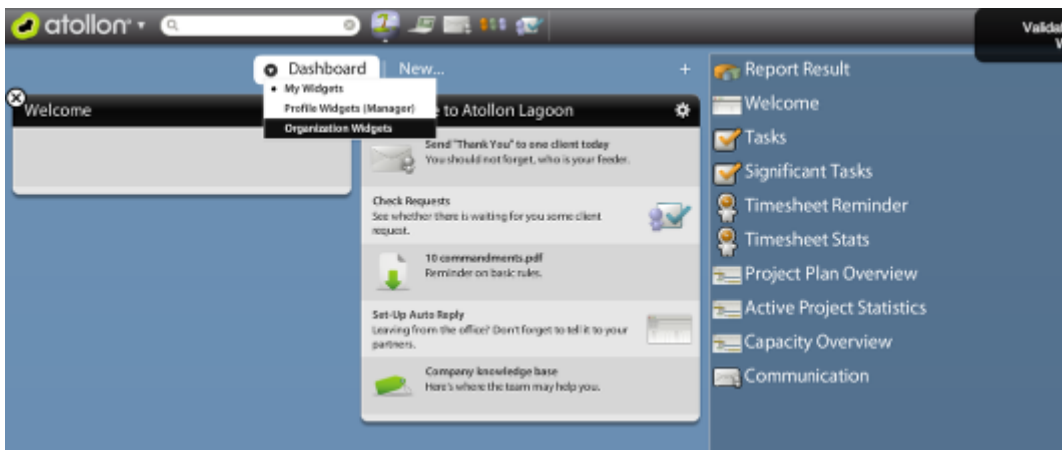
Add Welcome widget to Dashboard (select for whom)



1. Click on **(+)** button on top of Atollon Lagoon Dashboard
2. On black arrow **(>)** option select who's Dashboard is configured (you can select either **My Widgets** used for personal needs, **Profile Widgets** (used for all users having the same profile), **Organization Widgets** (for users in the same Organization))

In case you need to set-up Dashboard for **other user profiles** (eg. Sales, Consultants, Programmers, Accountants, Finance, Lawyers, etc.), you need to switch your own user profile in **User Settings** (Setting > Users > edit). Afterwards you will be able to amend any other User Profile.

Add Welcome widget to Dashboard

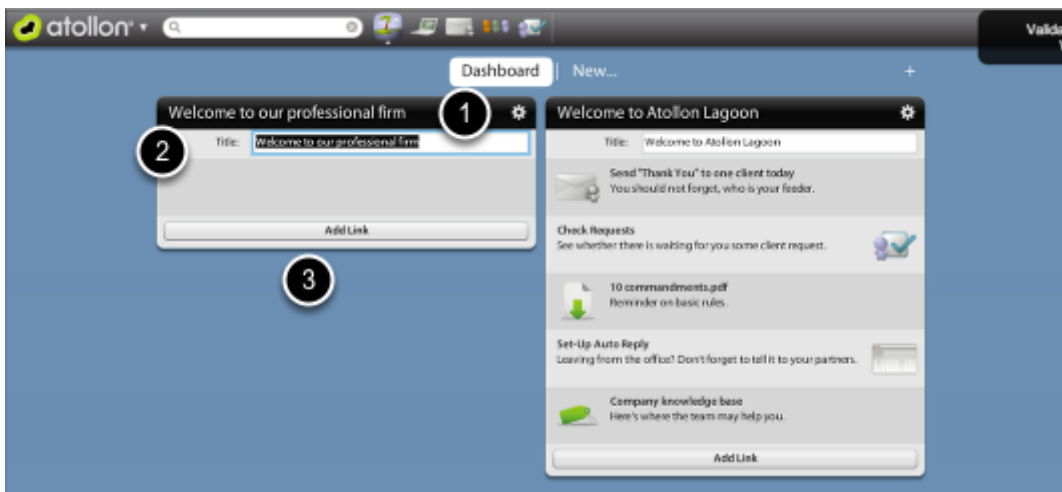


Drag & drop the Welcome widget on the empty space

You can add several Welcome widgets on any of the dashboard panels.

After adding the Welcome widget, close the edition of widgets by pressing **(+)** button again.

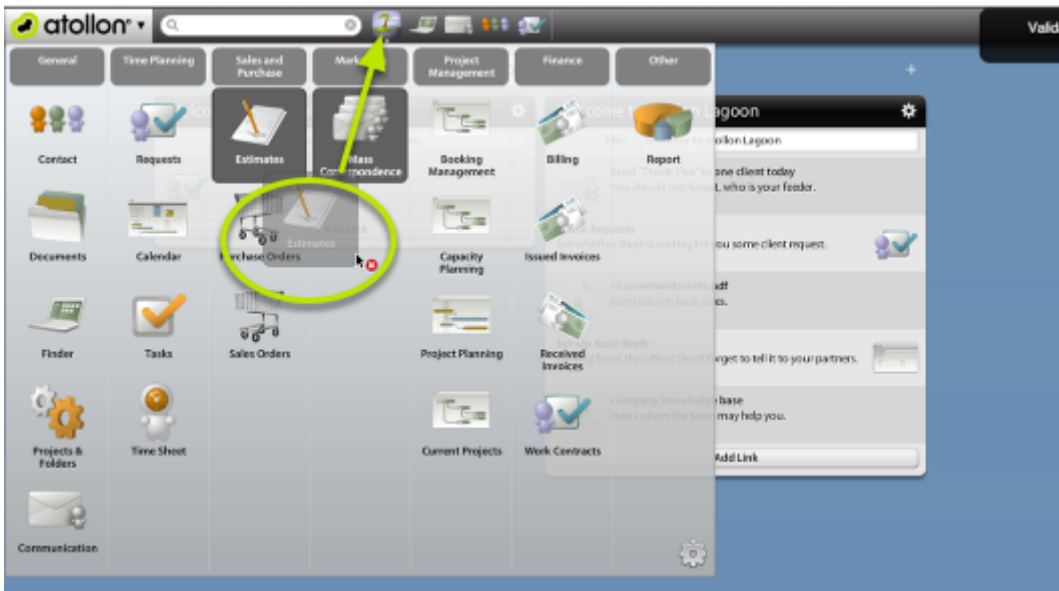
Edit Welcome widget contents



1. Click on **Settings** button in the widget header.
2. Change the **widget title**

The widget is now in EDIT mode. You can add it's components (rows) - links, shortcuts, etc.

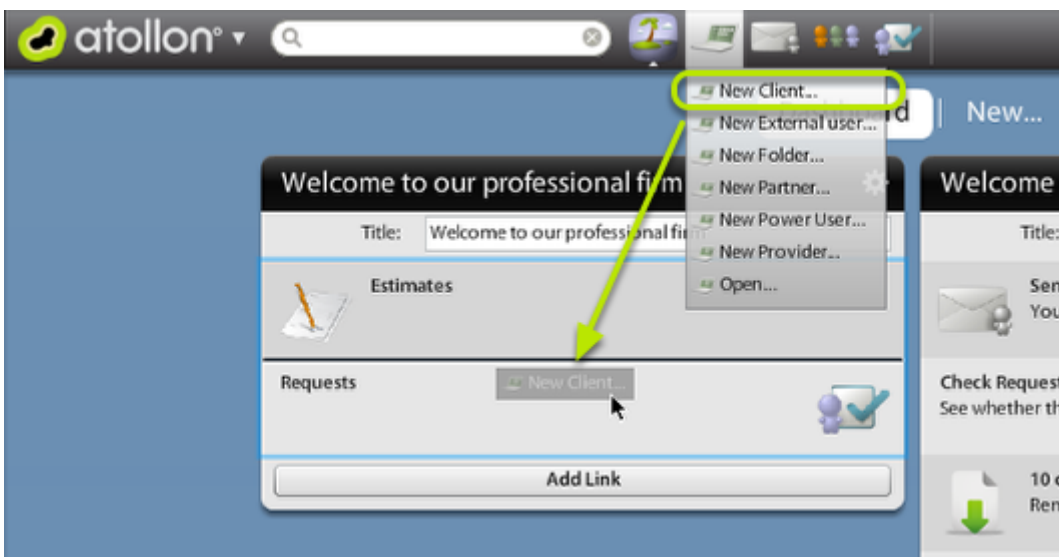
Add shortcut to Atollon Lagoon application



You can simply **Drag & Drop** any **application to Dashboard** & place **on top of the Welcome widget** to create shortcut to the application.

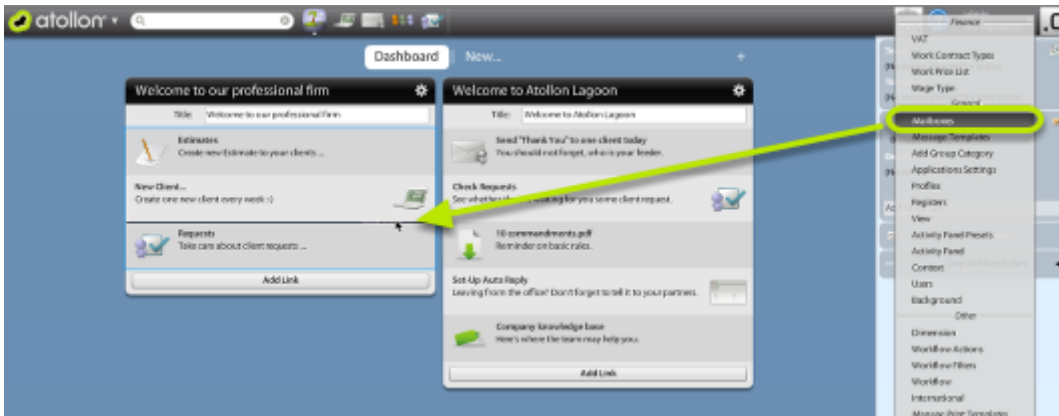
After you place the application shortcut on Welcome widget, you can rename it and add some description.

Add shortcut to Atollon Lagoon application's function



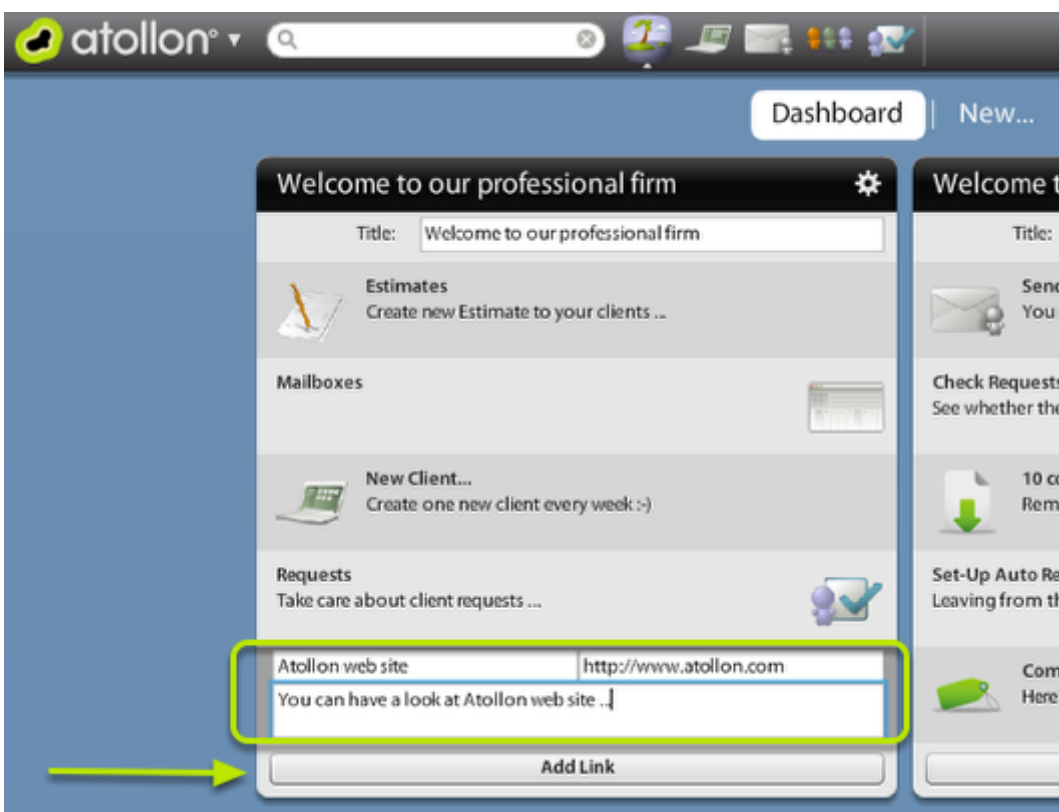
You can Drag & Drop any function from application's drop-down menu and put it on top of the Welcome widget. This will create a shortcut to the function. You need (at least temporarily) add the application on the Application task bar. You can do it in Settings > Application Settings.

Add shortcut to any Atollon Lagoon settings



You can Drag & Drop any item(s) from **Settings** onto the Welcome widget. For example Mailbox settings allow users to set-up Auto-reply when unavailable ...

Add link to external URL



You can add any number of external links. When copying/adding the links, please make sure you add also http:// or https:// (for secure access) in front of the web page address (URL).

Dynamic URL parameters

If you want to pass some dynamic parameters in url (like username, session etc.), there is a list of keywords, which will be replaced with actual value. Here it goes:

```
public static const SESSION: String = "${SESSION}";
public static const SERVER: String = "${SERVER}";
public static const ORGANIZATION: String = "${ORGANIZATION}";
public static const USER_ID: String = "${USER_ID}";
```



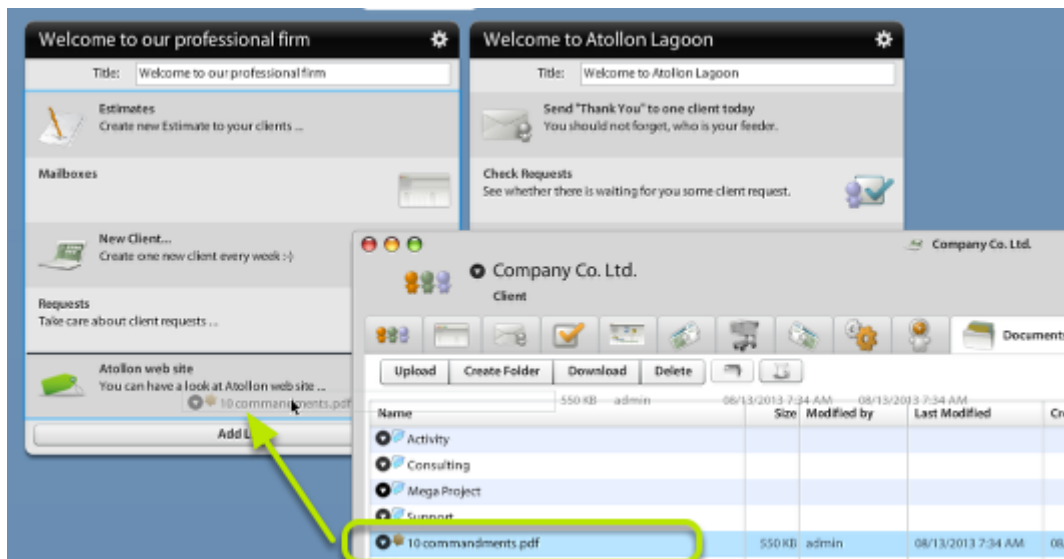
```
public static const USERNAME: String = "${USERNAME}";
public static const WSDL_FOLDER: String = "${WSDL}";
public static const DOMAIN_ROOT: String = "${DOMAIN}";
public static const ENDPOINT: String = "${ENDPOINT}";
public static const BASE_URL: String = "${BASE_URL}";
```

Example: [https://lifehacker.com/?username=\\${USERNAME}](https://lifehacker.com/?username=${USERNAME}) will be translated to <https://lifehacker.com/?username=johnny@atollon>

Atollon URL

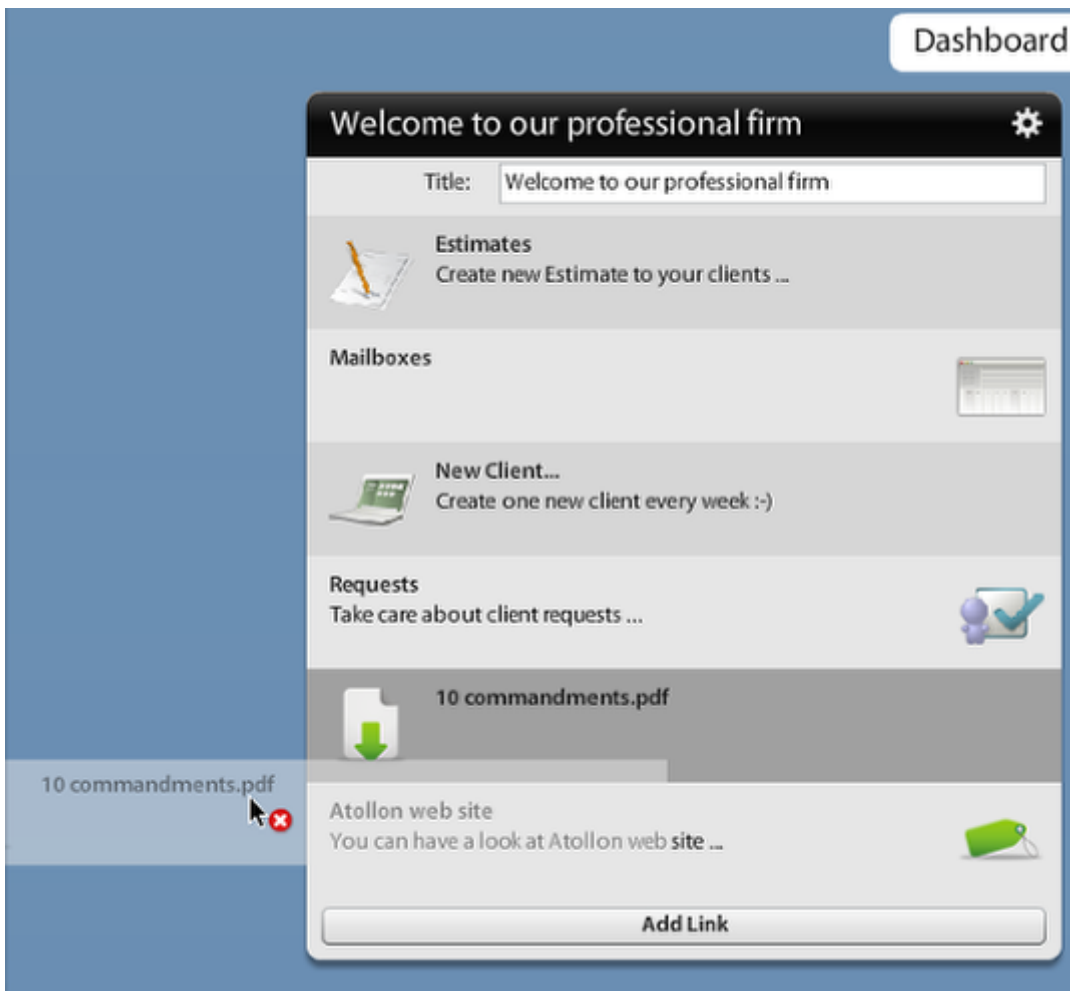
It is also possible to use "Atollon URL" - that is LINK you get by copying object that has "Share" button available. For example **atollon://finder/openDetail?id=133457101&type=project** may be link to open some project...

Add shortcut to open document



You can open any folder / project with document(s) and Drag & Drop the document on top of the Dashboard. After adding the shortcut to open document, you may rename it & add description.

Remove item from Welcome widget



Removing the item is quite simple. Just take one of the items and Drag & Drop it outside the widget -> on desktop of Atollon Lagoon.

After you have done all your edits, you can save them by pressing the Settings button in the widget title again.

Now the widget is in VIEW mode again.