1.12 Dashboards & Widgets

- Dashboards
- Widgets

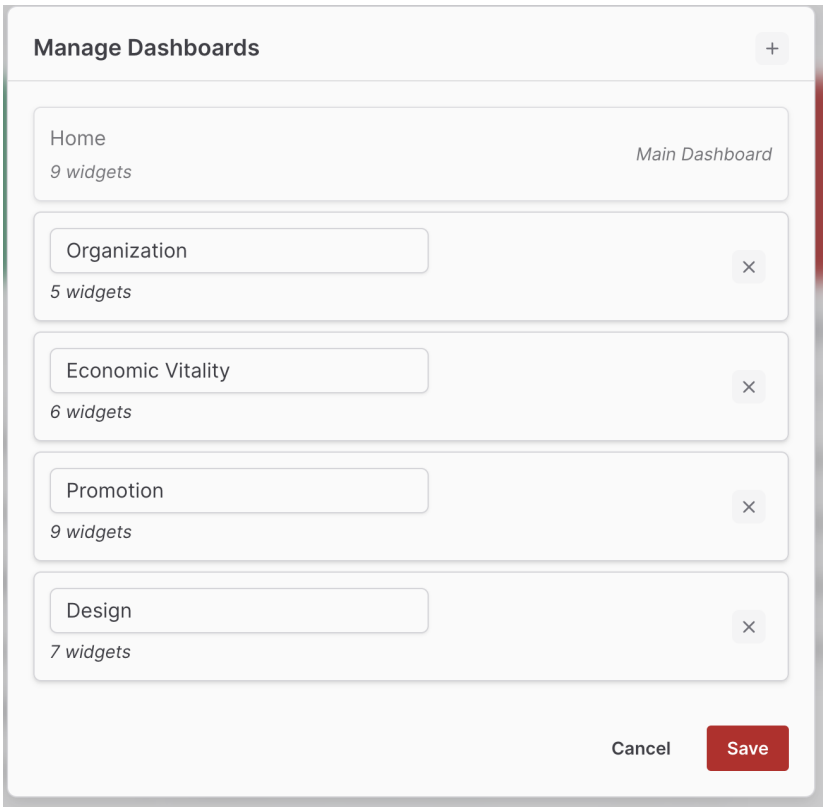
Dashboards

Dashboards are a way to display information that is already stored in the system on your screen. It is important to note that Dashboards are individual, and anything you set up will not be visible to any other user.

Everyone will have a default Home Dashboard. This is editable but is the only dashboard that cannot be deleted.

Users above "Volunteer" will also have an Organization, Promotion, Design, and Economic Vitality Dashboard by default. To edit, remove, or add Dashboards, from your Home screen click on the "Edit Dashboard" toggle.

Two icons will appear, a "+" button and a paper & pencil icon. This paper & pencil icon is the one to click on to edit the dashboards. This will open the dashboard editor.



This will show you all of your dashboards and how many widgets are on each dashboard.

To rename a dashboard, simply use the text box to edit the name.

To remove a dashboard, click on the "x" on the right side of that dashboard.

To add a new dashboard click on the "+" button in the upper right hand corner. A new line will appear and you can name that dashboard.

When you are done, click the save and your dashboards will be saved.

Widgets

Widgets are what pulls the information from the Maestro system into your dashboard. This allows you to quickly access information without having to search or scroll through your entire system to get what you need.

To add widgets to your dashboard (or to edit existing widgets), you will need to be on that dashboard. Then toggle the "Edit Dashboard" in the upper right hand section to the on position.

When this is on, all your widgets will become blurry, letting you know they are in edit mode. You can click on the gear on any widget to edit that widget, or click on the trash can to remove that widget.

All of the widgets in Maestro are responsive, so you can resize, drag, and drop them where you want them on your screen while in Edit mode.

To add a new widget, click on the "+" button text to the "Edit Dashboard" toggle.

You will have the ability to add widgets to your dashboard. You have the following widgets to select from:

- Contact List
  - Allows you to add a list of contacts you frequently search so you can access their profile quickly.
- Work Plan (Tasks)
  - Displays a list of tasks for a selected work plan
- Work Plan List
  - Displays an overview (X of Y completed) for work plans that you identify
- Task List
  - Displays a list of all upcoming and past due tasks for a specific person
- Business List
  - Allows you to add a list of businesses you frequently search so you can access their profile quickly.
- Address
  - Lists all businesses tied to a particular property
- Owner
  - Displays a list of all properties owned by a particular contact or business
- Notes
  - Creates a notes section for you to use
- Overview
  - Displays information from the work plans and focuses on volunteer activities. Specifically:
    - Tasks completed this month

    - Tasks remaining this month
    - Overdue tasks
    - Volunteer hours this month
- Economic Development
  - Displays date on key Economic Development Metrics. Specifically:
    - Occupancy Rate (Number of Units Occupied and total number of units)
    - Return on Investment (Private Dollars to Public Dollars)
    - Number of Businesses and employees
    - Rent Per Square Ft. (pulled directly from the units in Maestro. Formula = (Rent X 12)/SF
- Todo
  - Allows you to create personal to-do lists outside of the work plans. The more you utilize Maestro, the more this becomes a useful tool, and helps to remove all the sticky notes on your desk!
- Calendar
  - Displays a calendar for you that can be changed from weekly to monthly to daily view. This calendar does not pull data from the Maestro system, it is just a calendar display.