# INL DevResults User Guide:

Add and Create a Personal Dashboard

(INL Only)

DevResults Dashboards

The first page you will see when you log in to DevResults is a dashboard. Dashboards allow all users to view key metrics, graphics, maps and other project or program performance information in dynamic visualizations. Each user can create and design as many dashboards as they'd like to show information relevant to their projects.

There are two options for dashboards – you can either create your own or add an existing dashboard to your homepage. The following slides will walk through both options beginning with adding a dashboard and then creating a personal dashboard.

INL Default dashboard (below); sample dashboard (right)
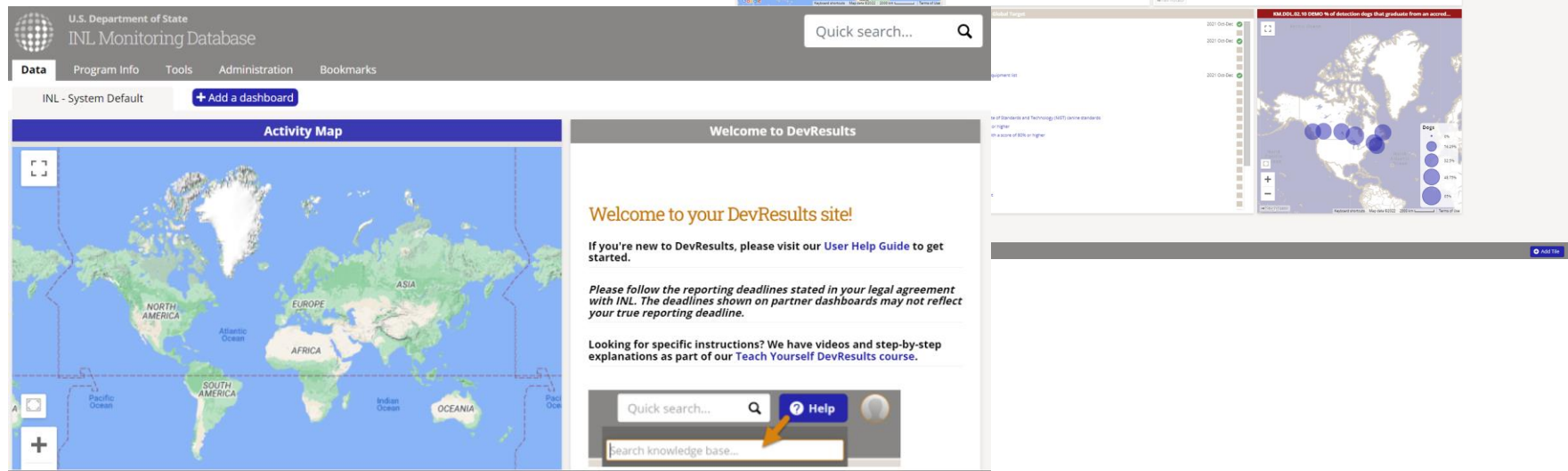
Add Dashboards to the Homepage

Homepage Views and Customization

You can customize your default DevResults homepage by adding dashboards you or others have created.

It's important to note that your DevResults homepage is the landing page you will see every time you log on to DevResults. It is your personal homepage: any changes you make to it impact only what you see. Changes to your homepage will not change those belonging to other users.
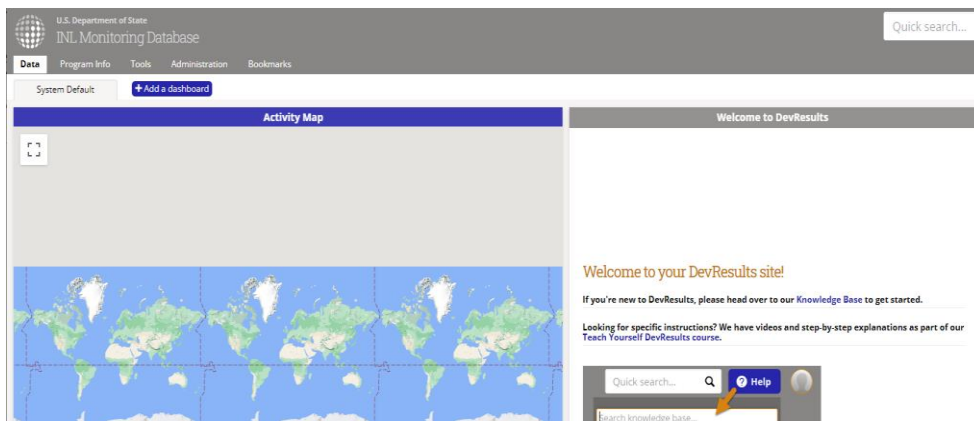
Sample DevResults Homepage:
INL Staff Default View

1. *Add a Program Dashboard*

To see if any dashboards have been created for your project or program, click the blue **Add a Dashboard** button on the DevResults landing page. Note that this button is located in the same place on your DevResults homepage for both the default IP and INL views, as shown below.
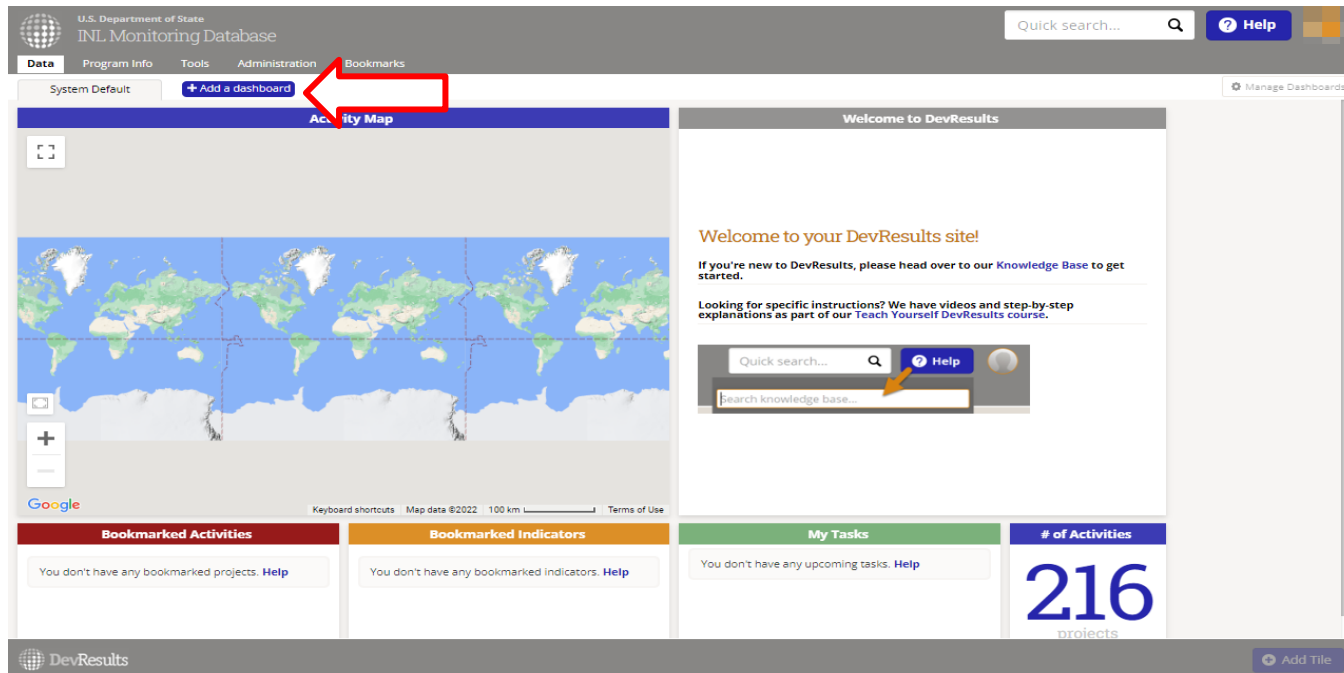
Sample DevResults Homepage: INL Staff Default View

2. *Add a Program Dashboard (continued)*

A menu will appear titled "Add Dashboard". On the "Add Existing Dashboard" tab, scroll through the list of dashboards available to you and select the dashboard you'd like to add by checking the box to its left. Users can also use the search bar to find and filter the dashboard list by typing in their project or program's naming convention (code). For instance, type your INL office (e.g. KM for Knowledge Management), a period, then your project (e.g. ILEA) to pull up any available dashboards related to ILEA projects.

Click the green **Add** button. As a general rule, do NOT choose "Add As Copy" (blue button) unless you intend to make edits to the dashboard.

3. *View Dashboards on Your Homepage*

Each time you log in, every dashboard you have added will be arrayed in the tabs on the top of your DevResults homepage, as shown below. You can navigate to different dashboards by clicking on the tabs.
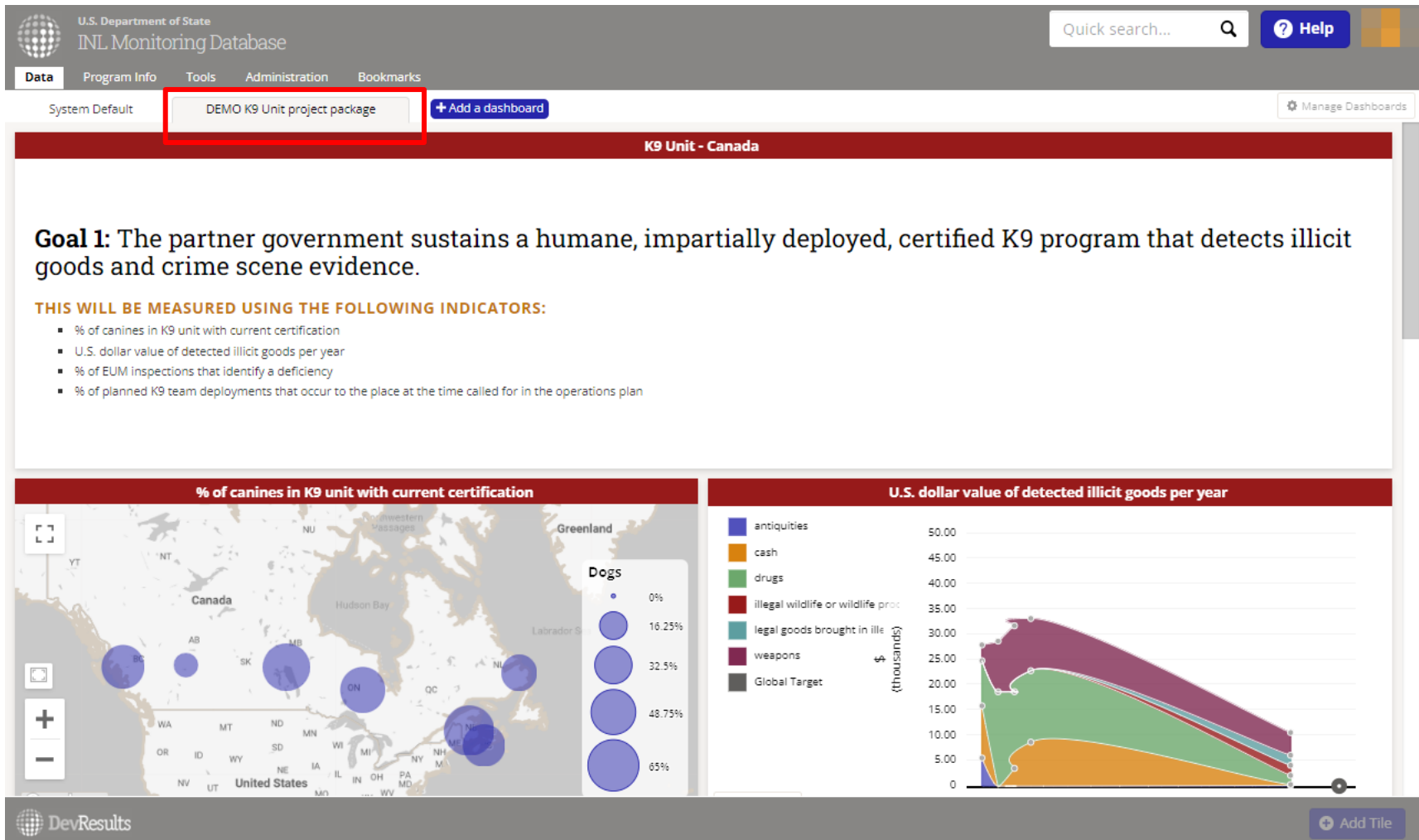
Demo project dashboard and data for sample purposes only.

4. *Removing a Dashboard From Your Homepage*

If you no longer wish to view a dashboard, simply hover over the name of the dashboard you would like to remove and click the X. A box will pop-up asking "Do you want to hide this dashboard from your view?" Click **Hide**. The dashboard will no longer appear on your homepage when you log into DevResults.

NOTE: Do not worry: Removing a dashboard will not delete it from DevResults.

5. *Removing a Dashboard (cont'd)*

If you would like to remove a dashboard from your homepage that ***you yourself*** have authored, a **different pop-up box** will appear asking "Do you want to delete this dashboard, or hide it from your view?" Click **Hide**.

If you click **Delete Forever**, the dashboard will be erased from DevResults.

Create your Personal Dashboard

Create Your Personal Dashboard

It can be helpful for INL staff to create a personal dashboard to quickly view specific information, particularly if you have many bookmarked projects, indicators, or data tables that you need to access frequently.

Your personal dashboard is a dashboard you create to show specific tiles, projects, indicators, and other selected pieces of information in the database. You can set up your personal dashboard such that it appears as the first dashboard you see upon logging into DevResults. This dashboard might be distinct from a project or program dashboard insofar as it is designed according to your specific tastes as a user. Jump ahead to <u>slide 15</u> for more information on adding a dashboard to your homepage.
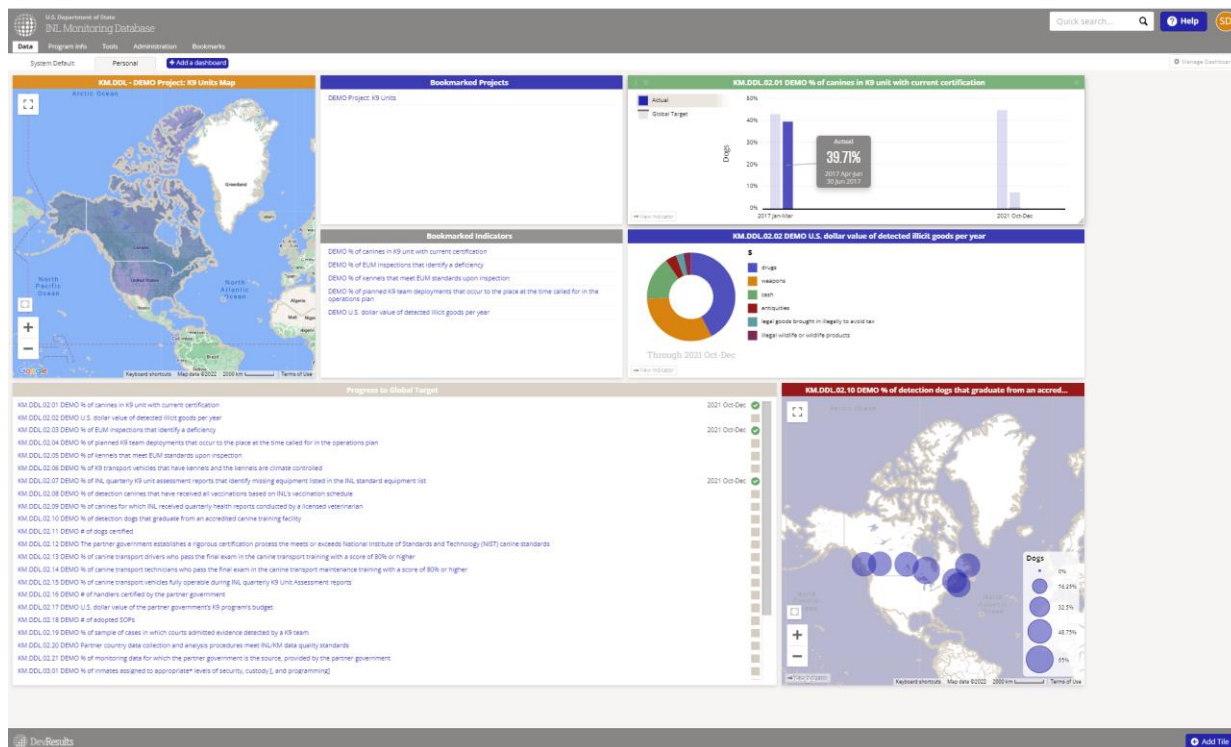
1. Click on "Create New"

To create a dashboard, click the blue Add a Dashboard button on the DevResults landing page. Next, the "Add Dashboard" menu will pop up. This menu will have two tabs from which you can choose to either add an existing dashboard or create a new dashboard. Click the **Create New** tab, as shown below.

2. *Fill Out Dashboard Details*

From the Create New tab, fill out details for your new dashboard. Name the dashboard and choose "Tiles" as its type. Do NOT check the "Make available to other users" box, as this dashboard will only be for use on your own homepage.

3. Click "Add"

Once you have filled out dashboard information, click **Add**.

4. Begin Building Your Dashboard

As shown below, you will see a blank page when you have successfully created your new personal dashboard. You can now begin populating the dashboard with different tiles of information. Since your personal dashboard should highlight items most relevant to you, this SOP will walk users through adding the most common tiles used to quickly navigate to project information: first, bookmark tiles and second, project map tiles.
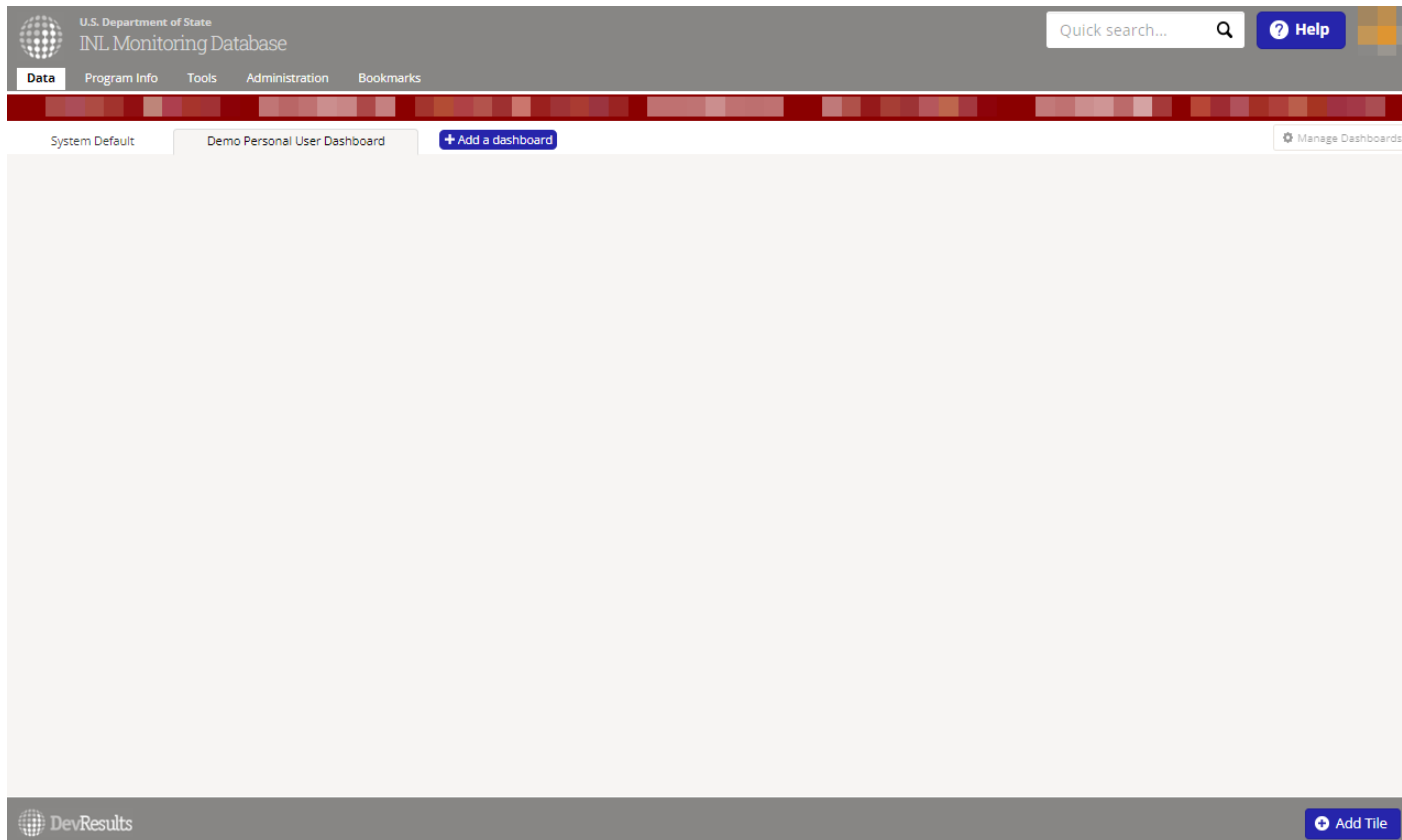
5. *Adding Bookmark Tiles to a Dashboard*

First, INL staff can add a Project Bookmarks tile to their personal dashboard to view all bookmarked projects directly on a dashboard. To do this, return to the DevResults homepage and select the tab that corresponds to your personal dashboard. Click **Add Tile** on the bottom right of the screen.

For more information on bookmarking projects, [click here](#).
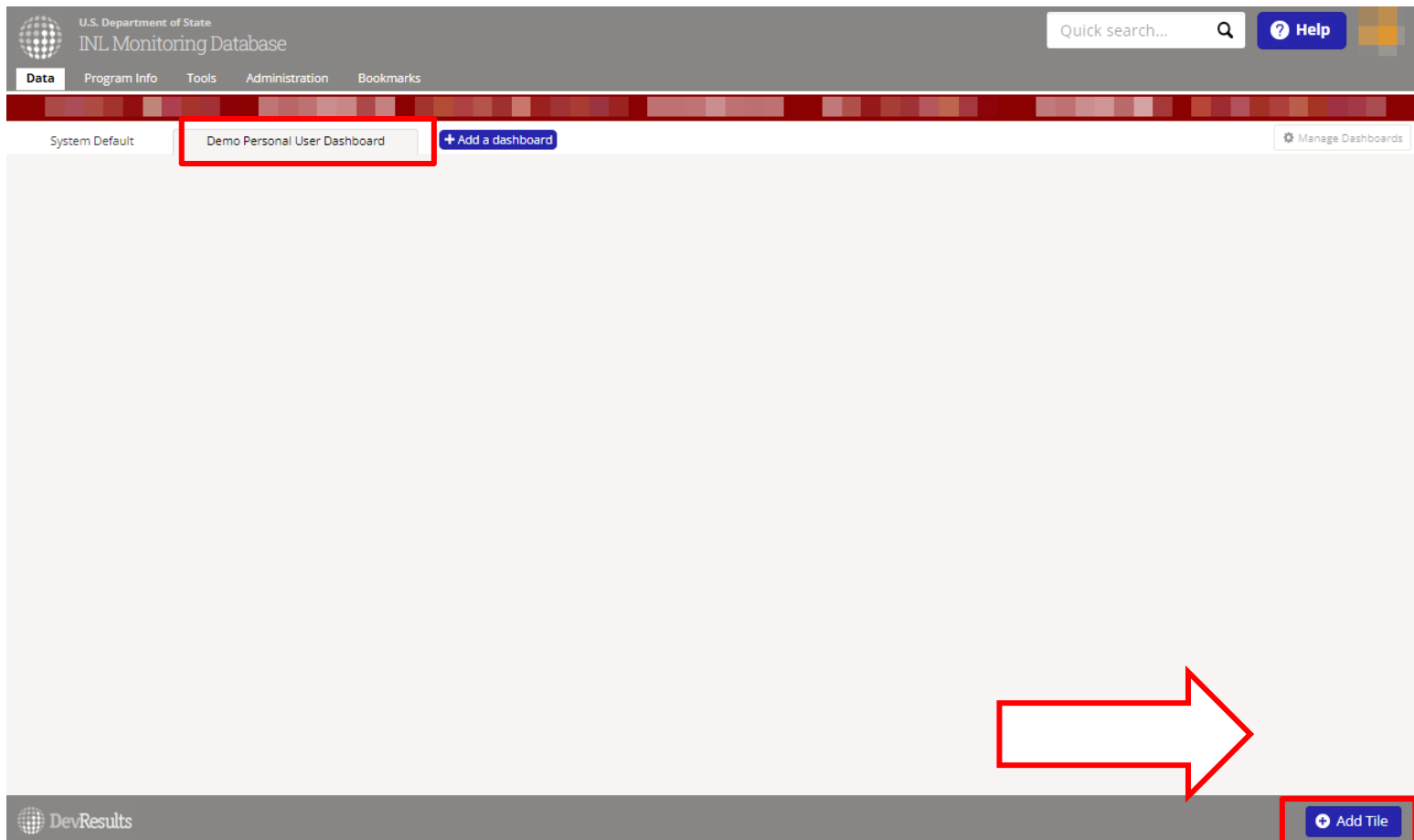
6. *Adding Bookmarks to a Dashboard (continued)*

A menu with tile options will pop up, as shown below. Select "Bookmarked Projects" from the menu, then click **Add.**
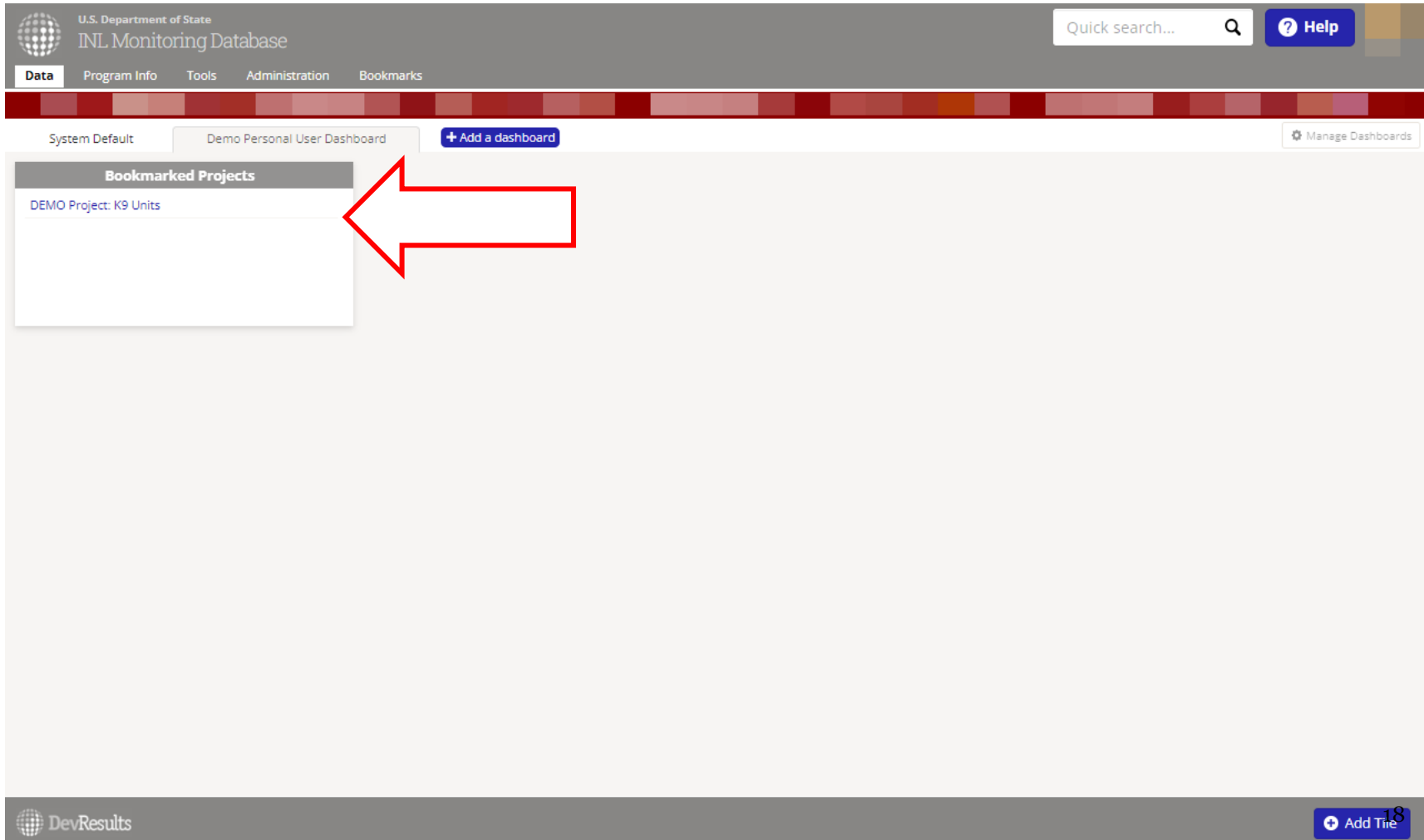
7. *Adding Project Bookmark Tile (continued)*

A tile showing all bookmarked projects will now appear as a title on your personal dashboard. This tile's list will automatically update as you add or remove projects from your favorites.

To navigate to a bookmarked project, simply click on the link in the tile in order to navigate to that project's page.

8. *Add Other Bookmark Tiles*

This process can be repeated in order to add bookmarked indicators and data tables to a tile on a personal dashboard. To do this, simply choose "Bookmarked Indicators" or "Bookmarked Data Tables" from the pop-up Add Tile menu. These tiles function in the same way as the Bookmarked Projects tile.

9. *Add Project Map Tile*

Repeat this process again to add a project map to a tile on a personal dashboard. To do this, simply choose "Project Map" from the pop-up Add Tile menu. These tiles function in the same way as the Bookmarked Projects tile, only that they will display bookmarked projects on a map.

10. Adding Project Map Tile (continued)

A tile showing all INL projects on a map will now appear as a tile on your personal dashboard. In the **Tile Configuration** menu, use the **Display** dropdown to determine the desired level of geography to view projects (e.g., by location, country, world, etc.). You can also use the **Filter** label to add further customization to your project map tile, such as limiting your map to specific countries or regions, adding individual projects, or displaying projects based on certain categories, such as status, implementing partner, or office/section.

To navigate to a project using the map, simply click on the highlighted nodes on the map to display projects and then click on a project's title to be taken to the project's page.

11. Adding Other Project Tiles

The complete list of available tiles includes:

Indicator Map - Choropleth or graduated symbols maps for any single indicator.

Indicator Pie Chart - Pie chart for a single indicator.

Indicator Targets and Actuals - Column, stacked column, line, and area graph for a single indicator.

Progress to Global Target - Shows good/warning/bad icons for indicator results compared to global targets.

Indicator Value - Actual result value for a single indicator for a reporting period or cumulative over time.

Program Statistic - See Awarded, Obligated, Disbursed for information about program statistic options.

Activity Map - Shows administrative divisions, map overlays, and/or locations to which activities are assigned.

Bookmarked Projects - List of (and links to) your personal bookmarked projects.

Bookmarked Indicators - List of (and links to) your personal bookmarked indicators.

Bookmarked Data Tables - List of (and links to) your personal bookmarked data tables.

My Tasks - This tile shows any tasks assigned to you from all activity checklists. See Checklists for more information.

Markdown Text - This tile allows you to add formatted text to your dashboards. You can also use this tile to link to saved reports, documents, etc. elsewhere on your DevResults site.
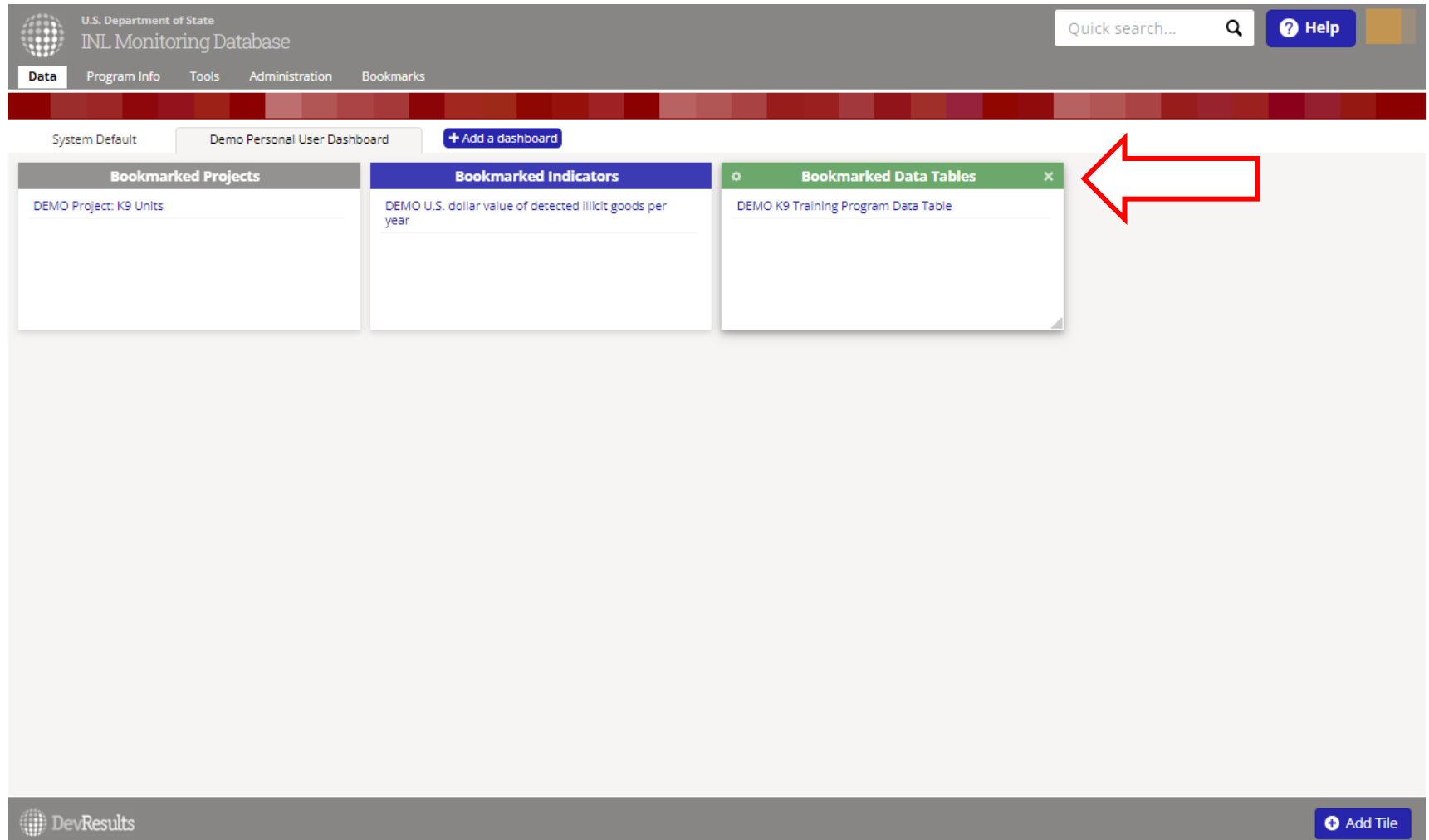
Matrix - A smaller, scalable version of a full-page MultiMatrix dashboard. See MultiMatrix for more information.
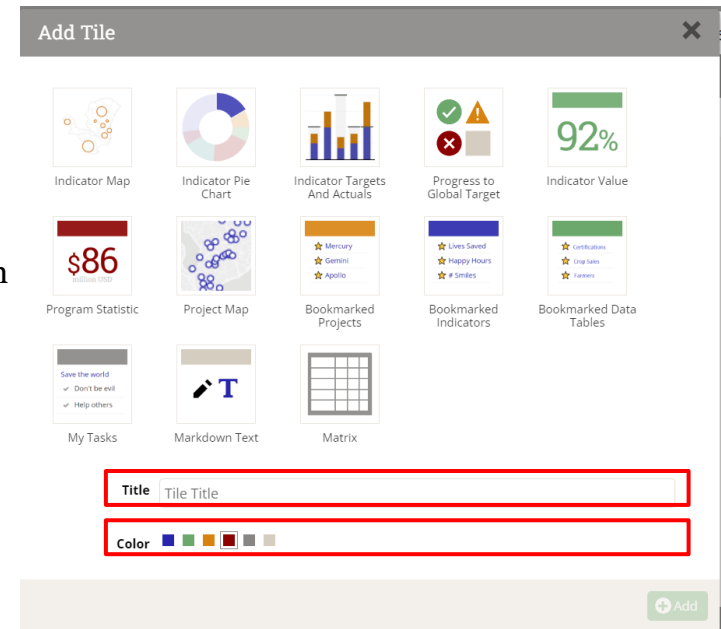
You may also add a Title and a color to each tile.

12. Remove Tiles

If you no longer want to see a specific tile on your personal dashboard, simply hover over the tile and click the "X" that will appear in its top right corner, as shown below: