

# VendorVision My Dashboards



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## Introduction

### 1.1. PURPOSE OF MY DASHBOARDS

The purpose of My Dashboards functionality is to provide a way for a user to see exactly the VendorVision information they want to see, in the location on their screens they want to see it, independent of the preferences of other VendorVision users.

### 1.2. SCOPE OF MY DASHBOARDS FUNCTIONALITY

The initial scope of this project is twofold:

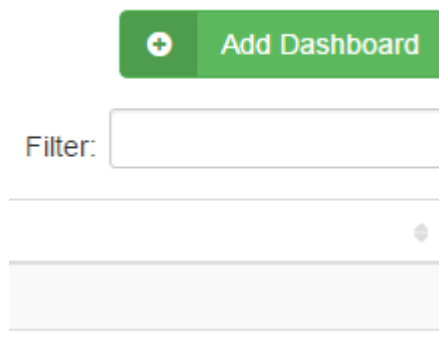
- Provide users with the ability to create and modify dashboards
- Provide users with three default dashboards prepopulated with appropriate widgets
  - Main
  - Vetting
  - Site Inspection

## 2. CREATING AND DELETING A DASHBOARD

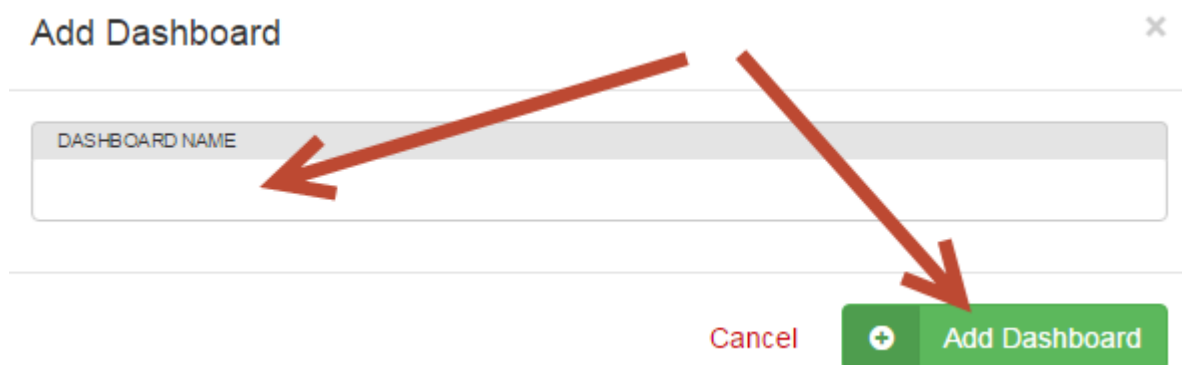
### 2.1. ADDING A DASHBOARD

To create a new dashboard –

- Choose My Dashboards from the Dashboard menu item above
- Click on the Add Dashboard button in the upper right



- The Add Dashboard modal pops up

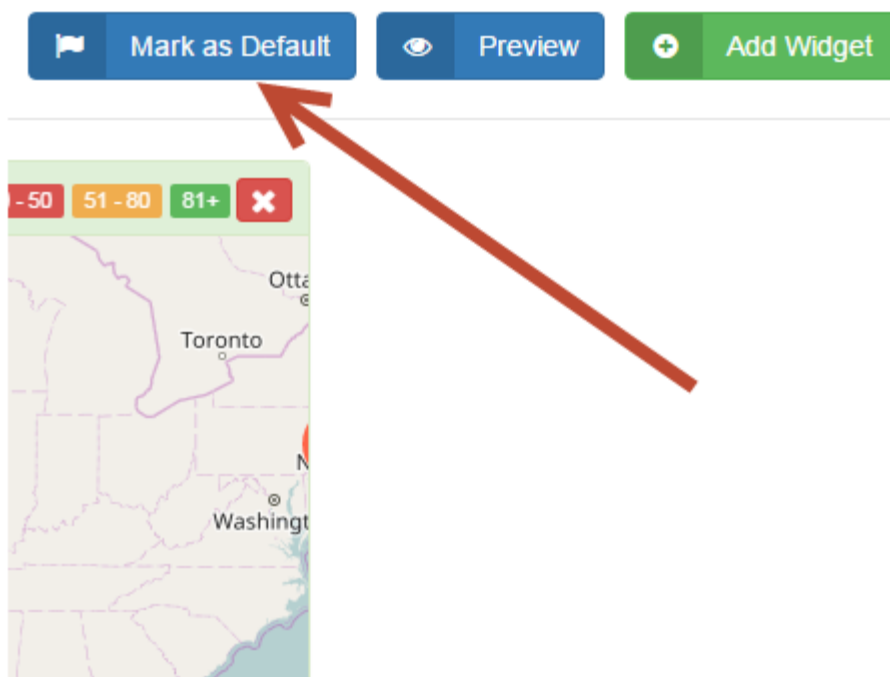


- Under DASHBOARD NAME, enter the desired name for the new dashboard
- Click the Add Dashboard button
- Continue by modifying the new dashboard per the below section 3

## 2.2. CHOOSING A DEFAULT DASHBOARD

The default Dashboard upon a user's initial login is the Main Dashboard. The user may choose any dashboard to be their default dashboard, which is the initial screen displayed after login. This can be done in two ways:

- In the upper right of a currently displayed Dashboard, click the Mark as Default button:



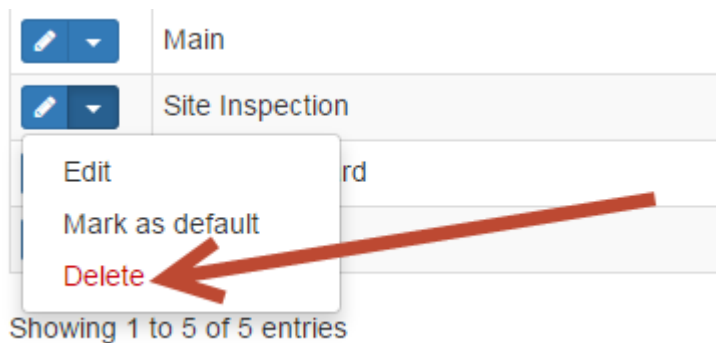
- On the My Dashboards page, select Mark as default from the dropdown next to the desired default dashboard



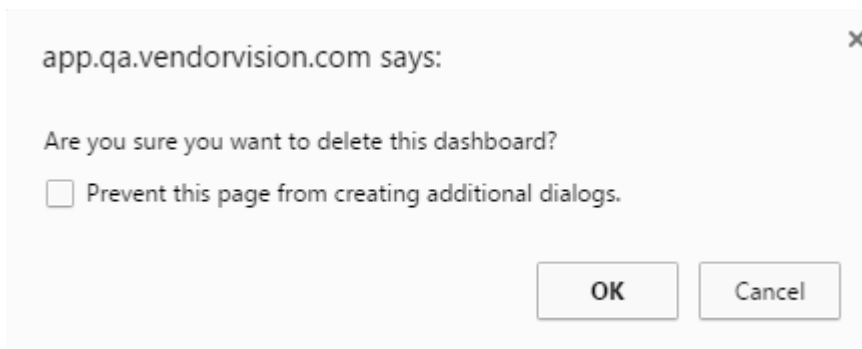
### 2.3. DELETING A DASHBOARD

To delete a dashboard -

- On the My Dashboards page, select **Delete** from the dropdown next to the desired default dashboard



- The Delete confirmation modal pops up



- Click the OK button
- The selected Dashboard is permanently removed from the My Dashboards page and VendorVision

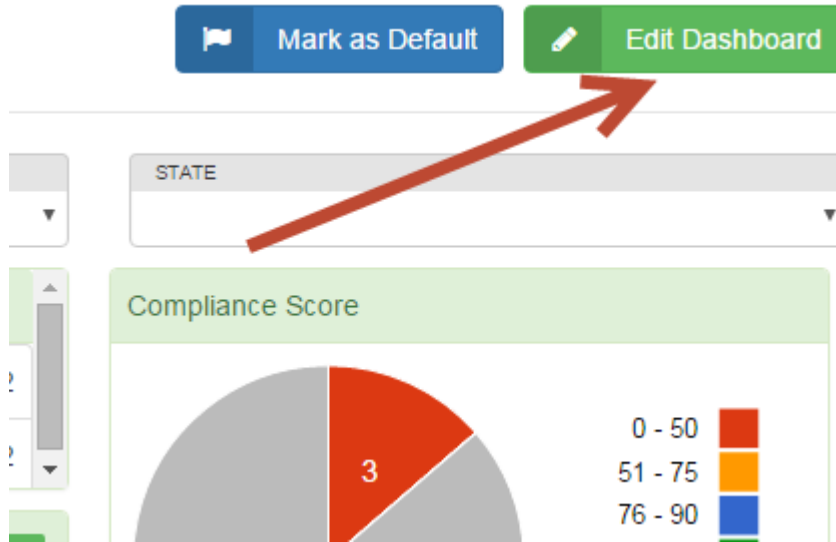
### 3. MODIFYING A DASHBOARD

Note that all changes made on a Dashboard will be automatically saved. In order to undo changes one must either reverse the change or delete and re-add a widget to the desired position.

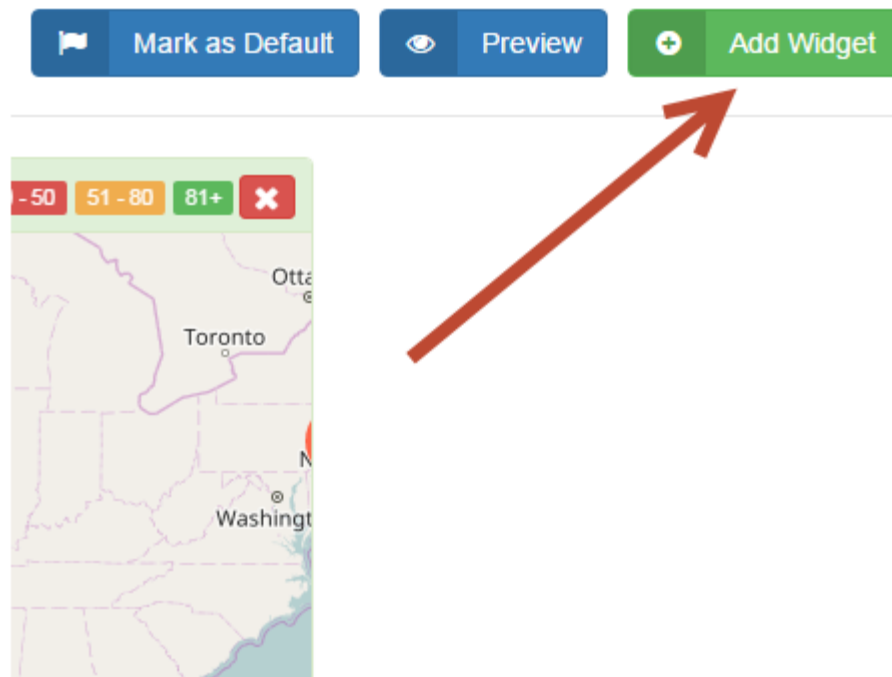
### 3.1. ADDING A WIDGET

To add a widget to a Dashboard –

- Click the Edit Dashboard button in the upper right of the currently displayed Dashboard



- Click the Add Widget button in the upper right of the currently displayed Dashboard.



- The Add Widget to Dashboard modal will appear

## Add Widget to Dashboard "Main" ✕

WIDGET
Vetting Expiration By Dates By Vendor <span style="float: right;">▼</span>

WIDGET SIZE
Small <span style="float: right;">▼</span>

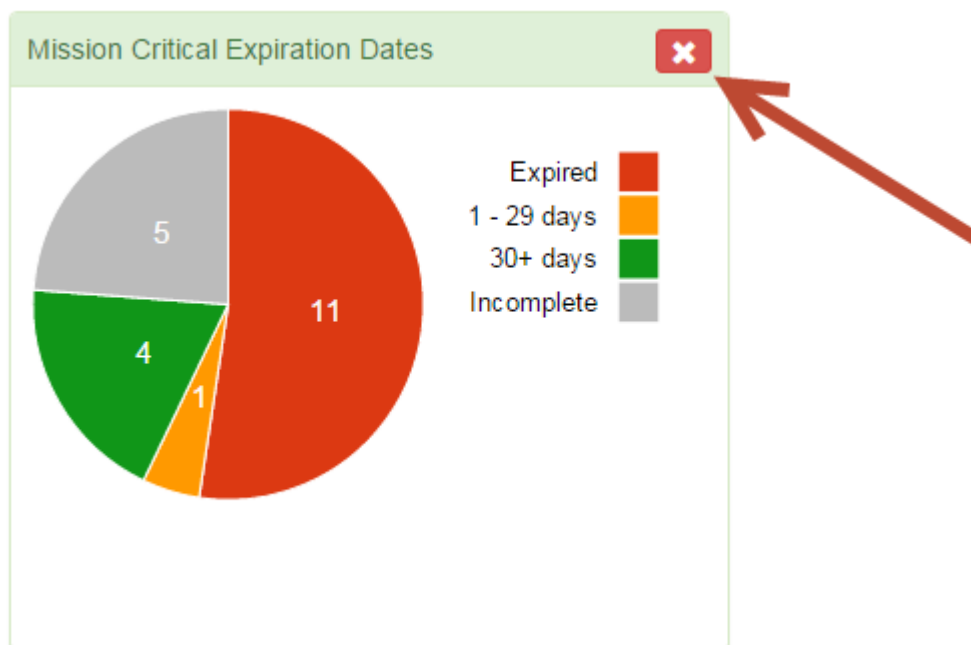
Cancel

Add Widget

- From the WIDGET dropdown, choose the desired Widget to add to the Dashboard
- From the WIDGET SIZE dropdown, choose the size (Small, Medium, Large, Extra Large) desired for the chosen widget
- Click the Add Widget button
- The selected widget will be added automatically to the uppermost and leftmost location that's big enough to accommodate it

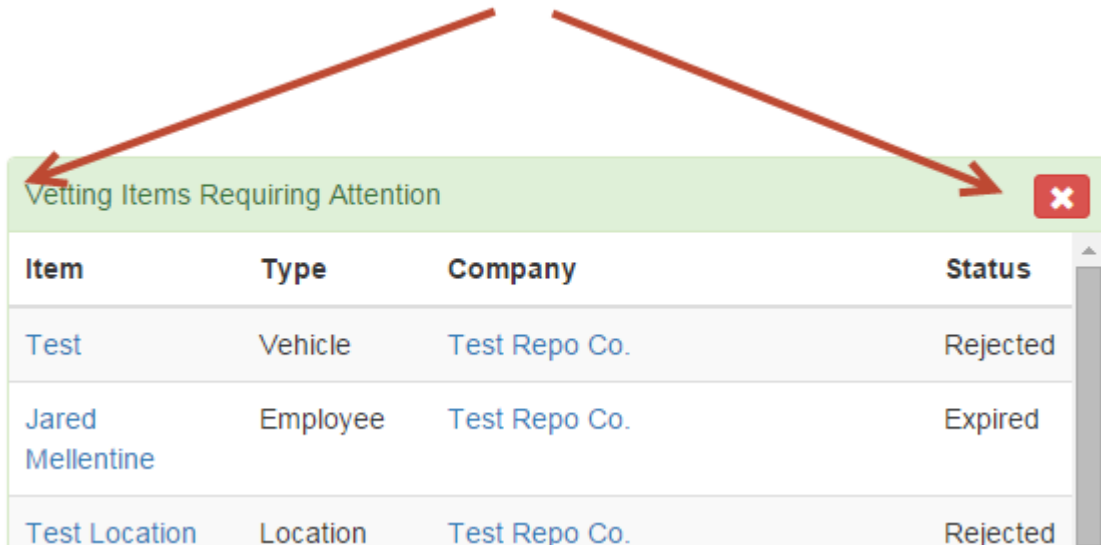
### 3.2. DELETING A WIDGET

To delete a widget, click the red "X" on far right of widget Title Bar.



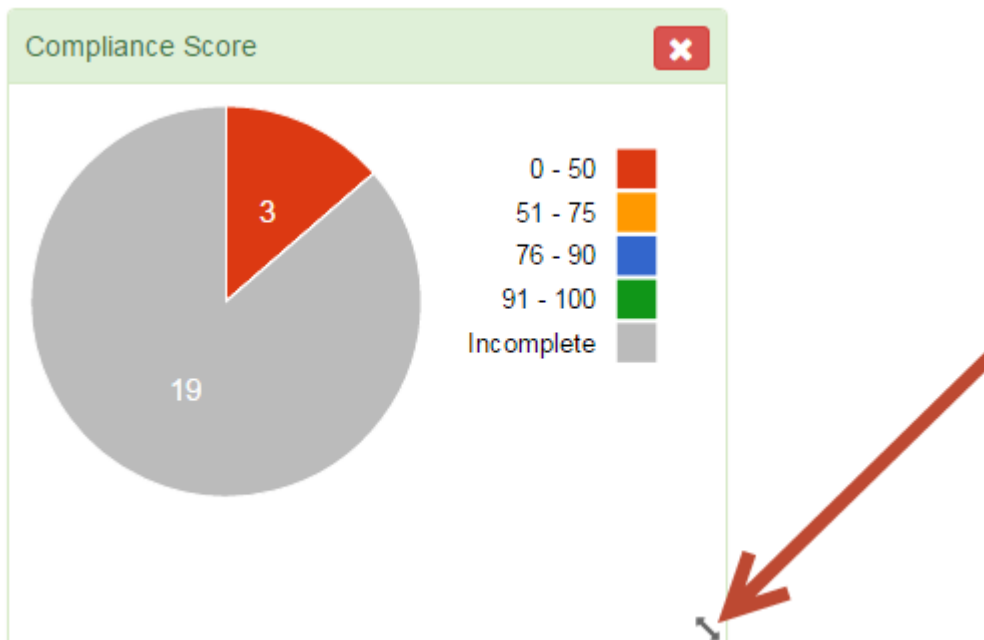
### 3.3. MOVING A WIDGET

To move a widget, click and hold anywhere on the widget Title Bar. Then drag and drop the widget at the desired dashboard location. Note that the framework may not let a widget be positioned in the drop location if the location isn't big enough or there's an empty space above the drop location.



### 3.4. RESIZING A WIDGET

To resize a widget, click and hold the resizing icon in the lower right corner of the widget. Then move your mouse vertically and horizontally until the widget is the desired size.



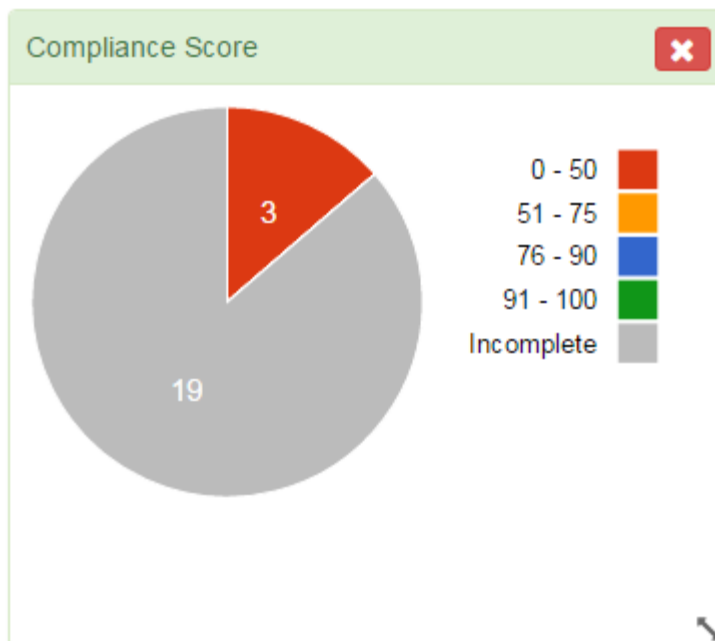


## 4. MAIN DASHBOARD DEFAULT WIDGETS

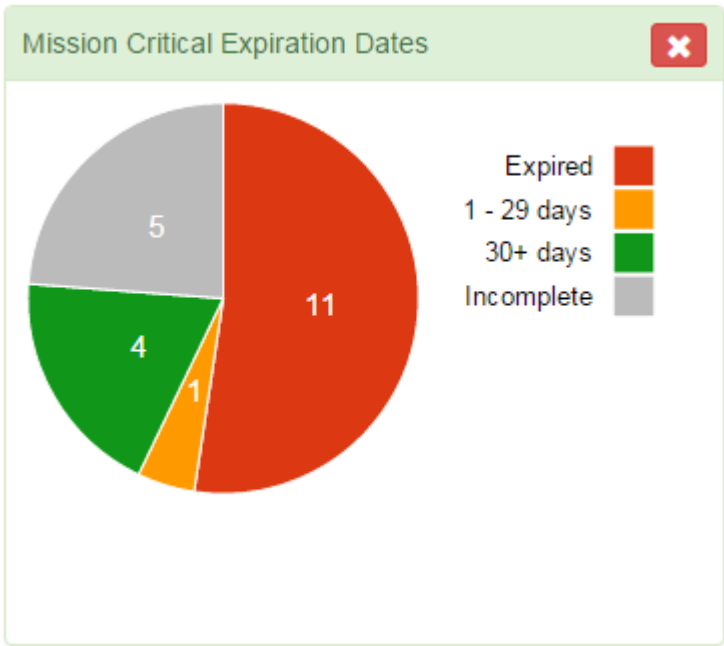
### 4.1. COMPLIANCE SUMMARY

Compliance Summary <span>✕</span>	
<b>Total Vendors:</b>	22
<b>Out of Compliance:</b>	22

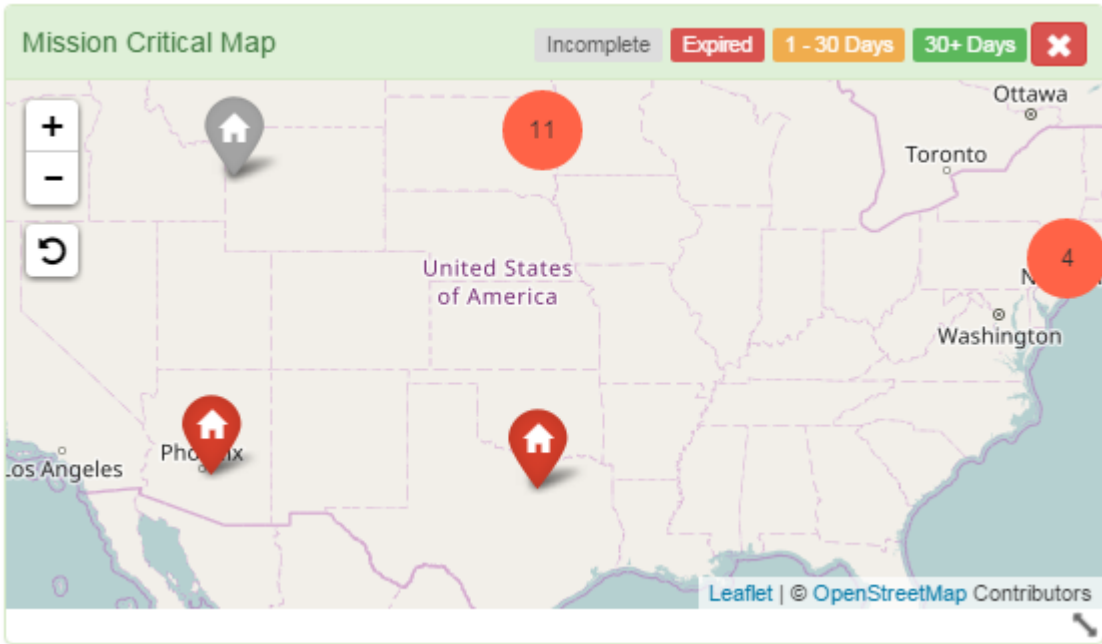
### 4.2. COMPLIANCE SCORE



### 4.3. MISSION CRITICAL EXPIRATION DATES



#### 4.4. MISSION CRITICAL MAP



#### 4.5. MY VENDORS

My Vendors <span>✕</span>	
Vendor	Task Count
Amer Chaudhary	0
Amer's Company	0
Amer's Repo Inc	0
Amer's Repo LLC	0
Amer's Repo LLC	0

#### 4.6. OPEN TASKS

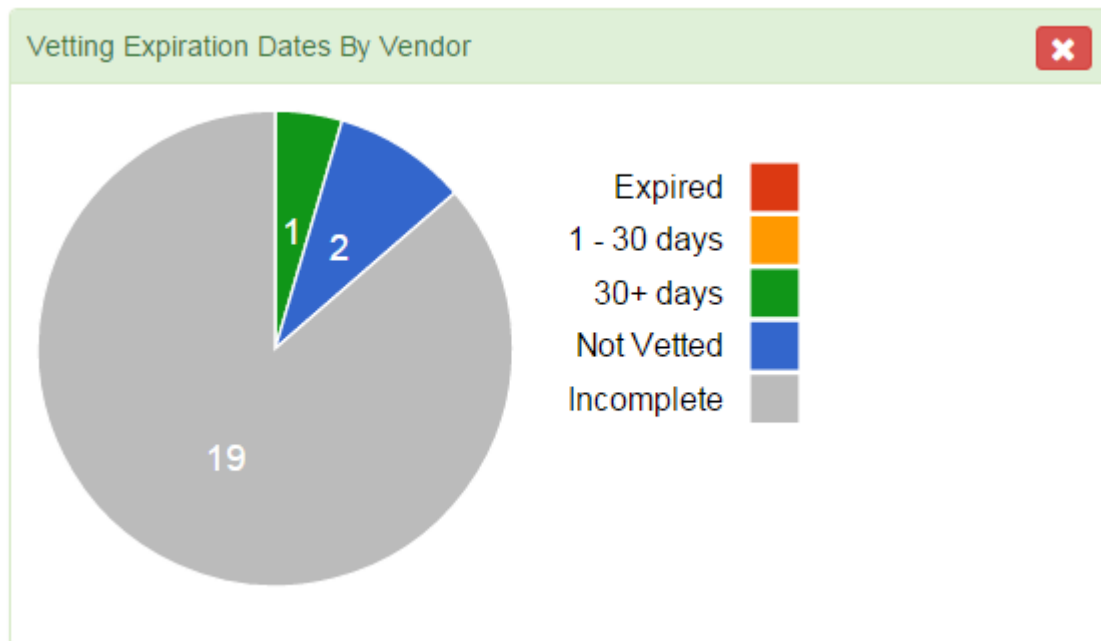
Open Tasks	
⤴ Buy a Shredder	New
⤴ This is a compliance Task	New
⤴ testing	New
<a href="#">View All</a>	

### 5. VETTING DASHBOARD DEFAULT WIDGETS

## 5.1. VETTING ITEMS REQUIRING ATTENTION

Item	Type	Company	Status
Test	Vehicle	Test Repo Co.	Rejected
Jared Mellentine	Employee	Test Repo Co.	Expired
Test Location	Location	Test Repo Co.	Rejected
Test Location	Location	Test Repo Co.	Not Vetted
Test Location	Location	Test Repo Co.	Not Vetted

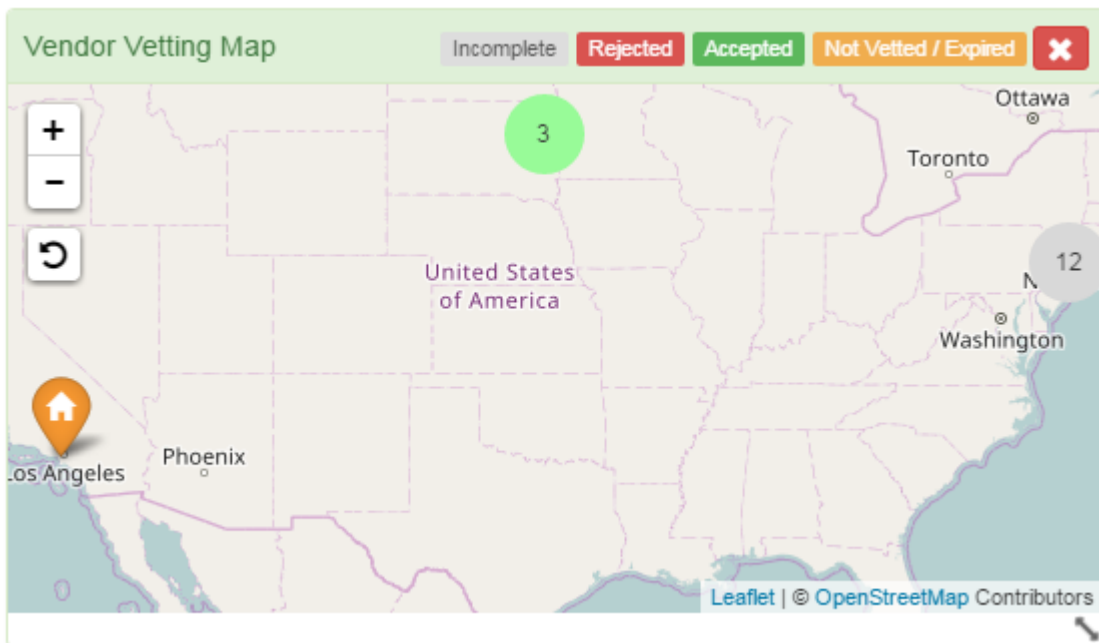
## 5.2. VETTING EXPIRATION DATES BY VENDOR



### 5.3. OPEN COMPLIANCE TASKS

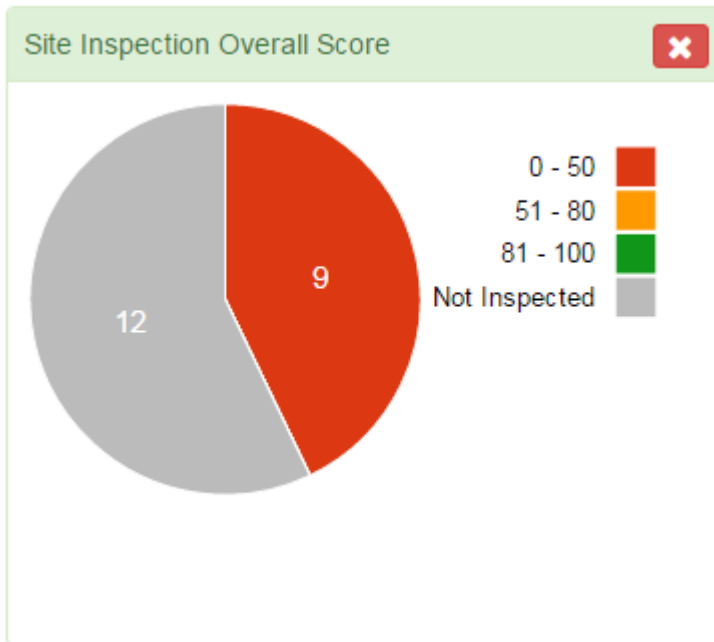
Open Compliance Tasks <span style="float: right;">✕</span>		
⤴	This is a compliance Task	New
^	testing	New
<a href="#">View All</a>		

### 5.4. VENDOR VETTING MAP

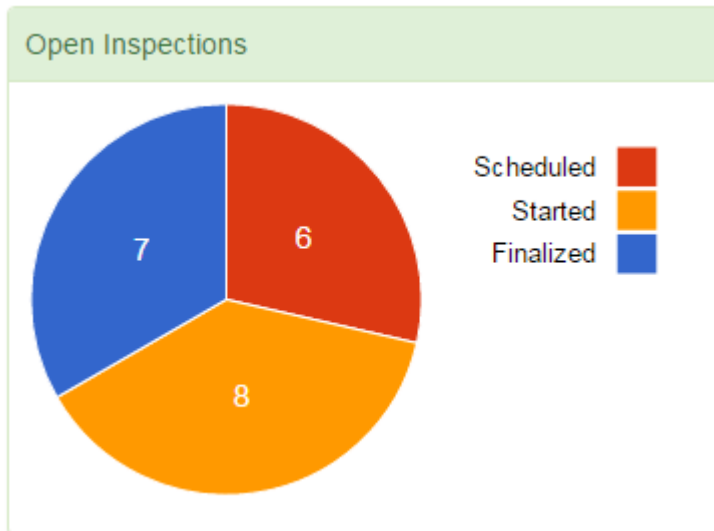


### 6. SITE INSPECTION DEFAULT WIDGETS

## 6.1. SITE INSPECTION OVERALL SCORE



## 6.2. OPEN INSPECTIONS



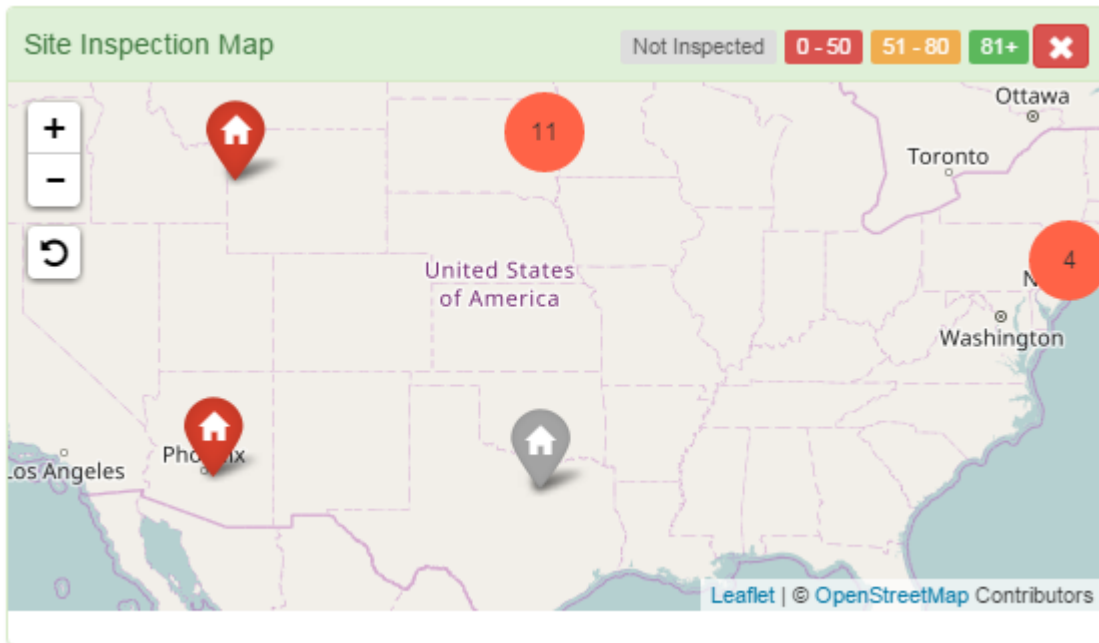
### 6.3. SITE INSPECTION SUMMARY

Site Inspection Summary <span>✕</span>	
<b>Unique Vendors Visited:</b>	6
<b>Total Sites Visited:</b>	6
<b>Average Score:</b>	37.35%

### 6.4. SITE INSPECTION CALENDAR

Site Inspection Calendar <span>✕</span>						
◀		May 2017			▶	
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4 ①	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27

## 6.5. SITE INSPECTION MAP



## 7. APPENDIX A – LIST OF AVAILABLE WIDGETS

The following is the initial list of available widgets and their respective default dashboards:

Default Dashboard	Widget Name
Main	Compliance Summary
Main	Compliance Score
Main	Mission Critical Expiration Dates
Main	Mission Critical Map
Main	My Vendors
Main	Open Tasks
Vetting	Vetting Items Requiring Attention
Vetting	Vetting Expiration Dates by Vendor
Vetting	Open Compliance Tasks
Vetting	Vendor Vetting Map
Site Inspection	Site Inspection Overall Score
Site Inspection	Open Inspections
Site Inspection	Site Inspection Summary



Site Inspection	Site Inspection Calendar
Site Inspection	Site Inspection Map