

# Creating Dashboards



1. Login to the LMS. Select **REPORTS, DASHBOARDS**. Select **NEW** from the drop-down menu under **OPTIONS**.



2. Type the name of your dashboard by clicking on **"TYPE A NAME"**. Begin typing dashboard name. Select **OK** when finished. Add a description if desired – not mandatory - under **"TYPE A DESCRIPTION HERE"**. **NOTE:** Several Widgets (a widget is a report) can be added to each Dashboard and several dashboards can be created.

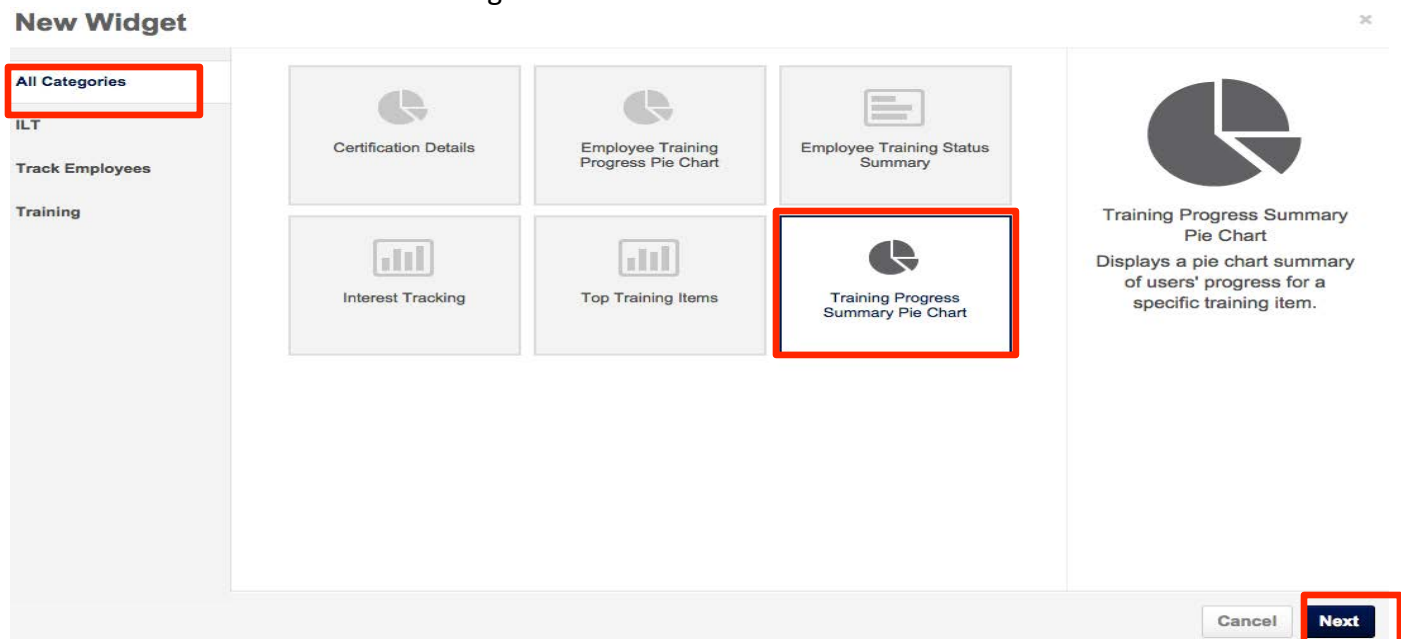
After the name and description is completed, select **ADD WIDGET**.

Type a Name

Type a Description here

Add Widget Cancel Save

3. The most common dashboard you will use is the **TRAINING PROGRESS SUMMARY PIE CHART**, under **ALL CATEGORIES**. Select this Widget and then **NEXT**.



4. Next, you will see a screen that is similar to a Standard report. Enter the criteria you are looking for results on this reporting widget. For this example we are using the curriculum DPS – NCVIP Performance Management for Employees for C.A. Dillon.

Starting at the top:

- Enter a Report Title (Example for this: NCVIP for Employees)
- Enter your Date Criteria (This example was left blank as this is a one time assignment.)
- Enter your ORG Unit or other User Criteria (C.A. Dillon was used in this example.)
- Search for the training title under Advanced Criteria.
- Always check “Include users who have completed equivalent courses in the report.”
- Click SAVE

#### Training Progress Summary Pie Chart

**Report Criteria**  
Select a training to view training progress information for your users in this organization. The date filters below refer to the training registration date.

**Report Title**  
Report Title: NCVIP for Employees

**DATE CRITERIA**  
Date Criteria: Select From: To:

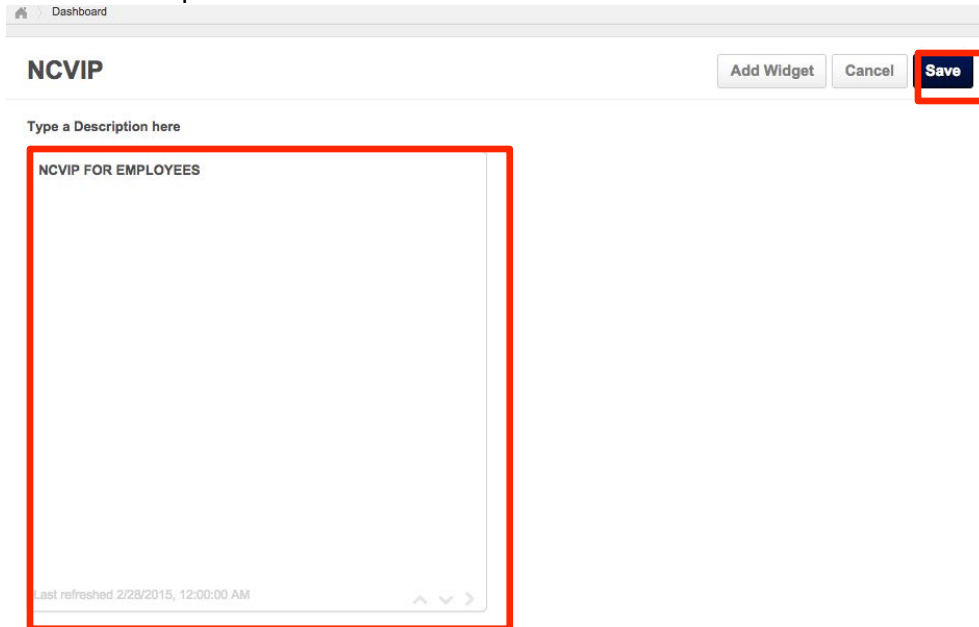
**USER CRITERIA**  
The availability criteria that you select will only include employees who meet the following criteria: (ORG UNIT is or below Public Safety)  
User Criteria: Select Criteria  
All employees in ORG UNIT: JuvJus YthDevCtr-C.A. Dillon Admin ☒ Include subordinates

**ADVANCED CRITERIA**  
Training Title: DPS - NCVIP Performance Management for Employees  
Transcript Status: ☐ Include users who do not have this training item on their transcript or have not activated the training item.  
User Status: ☐ Include inactive users  
Equivalent Training: ☒ Include users who have completed equivalent courses in the report.  
Include Removed Training: ☐ Include training that was removed from user transcript  
Cancel Save

**\*\*CONTINUED ON NEXT PAGE\*\***

5. You will see your NCVIP widget – which will be blank until you finish adding Widgets and Save the dashboard.
- Note:** You have the option to add another Widget to this dashboard or **SAVE** this dashboard. To add another widget you will click on **ADD WIDGET**.

For this example we will SAVE this dashboard. **Select SAVE.**



6. You will see your Widget refreshing in the lower left-hand corner. Once it refreshes you will see the results as a pie chart.

**Important Note:** The data warehouse refreshes everyday at 6:30am, 12:30pm, 6:30pm, and 12:30am; any activity in between those times will appear in your report the next time the warehouse updates.

