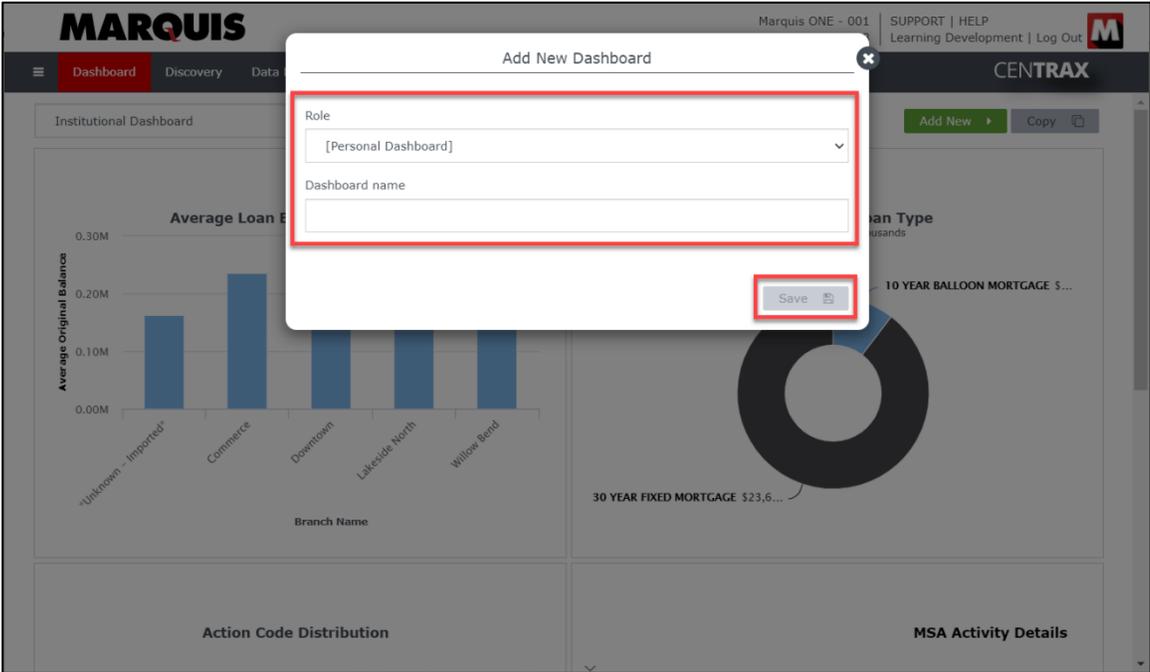


MARQUIS

CNX601	Creating a Dashboard
	The Dashboard feature allows for custom selected reports to be grouped and displayed for users based on their role within the system. They are designed to present the desired information based on current data at the time of logging into CenTrax NEXT. This document explores how to create a new Dashboard.
Order of Steps	Tasks
Step 1	Log into CenTrax NEXT
Step 2	The Dashboard will be the landing page
1.1	The Institutional Dashboard is a default dashboard that cannot be modified.
Step 3	To create a new Dashboard, click the green Add New button on the top right of the page
3.1	Click the drop-down arrow in the Role box to select who will have access to the dashboard
3.2	Type in a name for the Dashboard
3.3	Click Save
	
Note: The Dashboard Elements Report library is located on the right hand side of the Dashboard page. Click on the red button on the center right of the page to expand and collapse the Dashboard Elements library.	
Step 4	Add the desired reports to the Dashboard from the Dashboard Elements Report Library
4.1	Click the drop-down arrow in the Category box in order to isolate the list to display only those reports within a Dashboard Elements Category (optional)
5.2	Locate a report within the list and click the plus symbol to place it in the dashboard
Step 5	To resize the report, hover the mouse in the bottom right hand corner of the report widget, click and drag to the desired location
Step 6	To move the report to the desired location, click in the middle of the report widget, hold and drag to the desired location within the dashboard
Step 7	To remove a report from the dashboard, click on the X located in the upper right hand corner of the report widget.

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Note: There is no Save button so any changes made will occur immediately and will be retained automatically.

The screenshot shows the MARQUIS dashboard interface. At the top, there is a navigation bar with 'Dashboard' selected. Below the navigation bar, there is a dropdown menu currently set to 'Learning and Development'. To the right of the dropdown are buttons for 'Add New', 'Copy', and 'Manage'. The main content area features a pie chart titled 'Action Code Distribution' with the following data series: Originated (84.6%), Preappr. (0.7%), Appr. Not Acc. (1.3%), Declined..., Withdra..., and Closed... A red box highlights the 'Copy' button, and another red box highlights the 'Add New' button. On the right side, there is a sidebar with a list of reports, including 'Action Code Distribution', 'Action Code Summary - ALL', 'Action Code Summary - County', 'Action Code Summary - MSA', 'Action Code Summary - State', 'Applications by Loan Type', 'Average Disposition Cycle - County', and 'Average Interest Rate by Age'. A red arrow points to the 'Action Code Summary - MSA' report.

To save time for creating Dashboards for different Roles, use the Copy button

Step 8 Click the drop-down arrow and select the **Dashboard** to be copied

Step 9 Click the **Copy** button located in the upper right-hand corner

9.1 Customize the **name** to make it unique

9.2 Click the **Save** button

Step 10 Click the **Manage** button to change the assigned Role or Name

Step 11 Add or remove **reports** as needed using the previous steps covered.

The screenshot shows the MARQUIS dashboard interface. At the top, there is a navigation bar with 'Dashboard' selected. Below the navigation bar, there is a dropdown menu currently set to 'Institutional Dashboard'. To the right of the dropdown are buttons for 'Add New' and 'Copy'. The main content area features two charts: 'Average Loan Balance by Branch' (a bar chart) and 'Applications by Loan Type' (a donut chart). The 'Average Loan Balance by Branch' chart shows data for five branches: 'Unknown - Imported', 'Commerce', 'Downtown', 'Lakeside North', and 'Willow Bend'. The 'Applications by Loan Type' chart shows data for '10 YEAR BALLOON MORTGAGE \$...' and '30 YEAR FIXED MORTGAGE \$23,6...'. At the bottom, there are two more report thumbnails: 'Action Code Distribution' and 'MSA Activity Details'. A red box highlights the 'Institutional Dashboard' dropdown menu, and another red box highlights the 'Copy' button.

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