

Dashboard widget catalog

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Dashboard widget catalogs

A Dashboard widget catalog groups related cards and charts so you can choose the view that answers your business question. This page covers top widgets, backlog widgets, and management-report widgets. Sibling widgets stay together by family; the catalog does not create a separate page for each widget. The active tab is the dashboard tab currently selected for review or editing. A widget family is a group of sibling cards and charts that answer related business questions.

If you need to...	Go to
Open the dashboard	Open the Dashboard
Match a question to a widget family	Choose a widget catalog
Find a widget already on the active tab	Find and inspect a widget
Add a widget to the active tab	Add a widget and save the tab
Understand the wider dashboard	Dashboard overview
Review sales, booking, or backlog widgets	Sales and backlog widgets
Review pipeline and status widgets	Pipeline and status widgets
Review management-report widgets	Management report widgets

Before you start

The Dashboard requires signed-in access. Your available widgets also depend on your subscription,

the active tab, and whether the dashboard is in edit mode.

Before you start...	Why it matters
Sign in	Sign in before opening the Dashboard.
Choose the active tab	A widget already on that tab is removed from the available choices.
Check your subscription	Widget availability checks whether the feature is included.
Enter edit mode to arrange widgets	Dragging and resizing depend on edit mode.

The dashboard library can be replaced by a subscription-upgrade surface when the dashboard feature is not included. The widget area can also appear only when its conditions are met, so use the surface currently shown on your Dashboard.

Open the Dashboard

The Dashboard is the signed-in workspace where your configured cards and charts appear. Open it when you want to review the current tab before choosing, finding, or adding a widget.

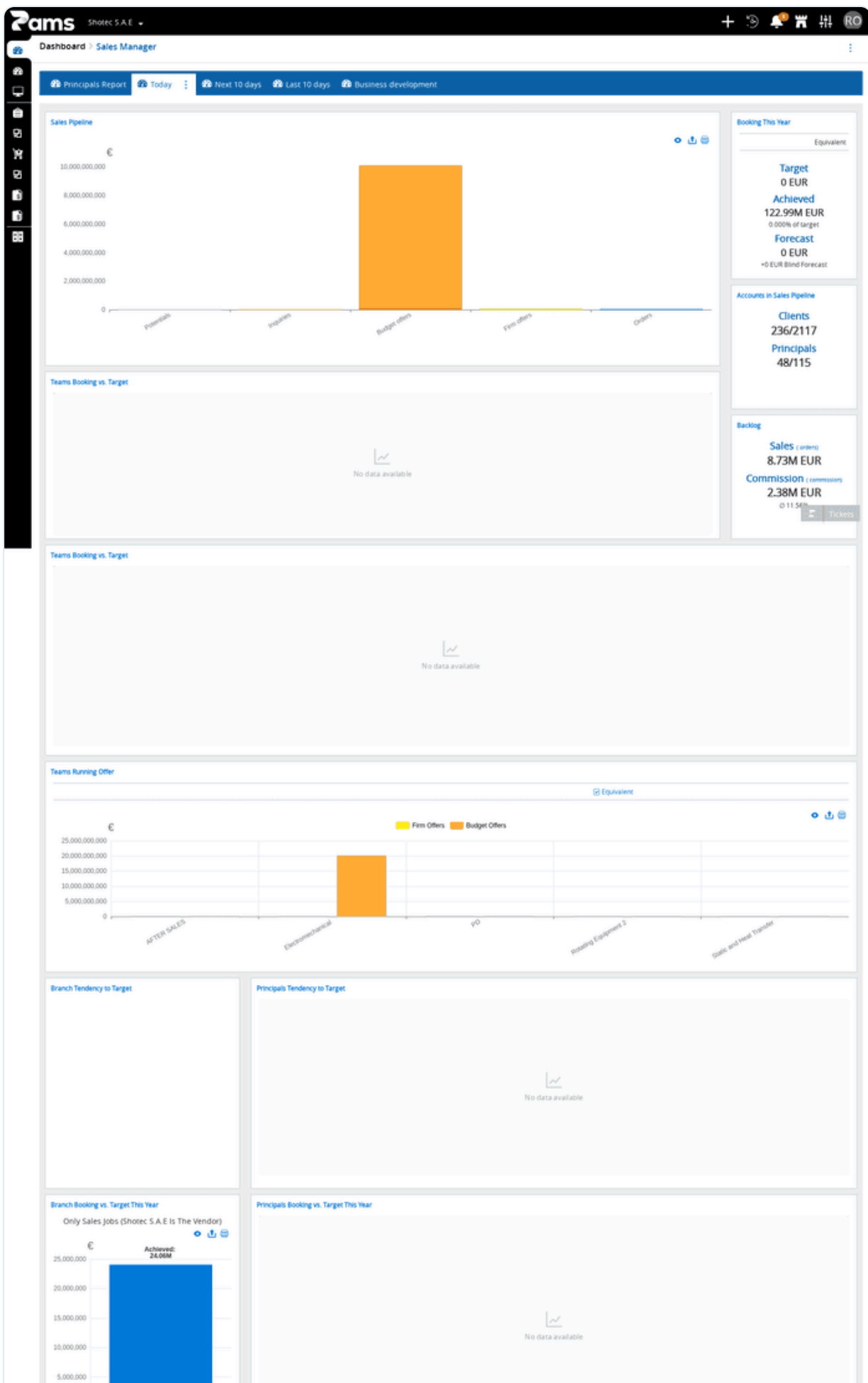
Prerequisites

- You are signed in.

Steps

1. Open the Dashboard.
2. Check whether the dashboard library appears.
3. If the library does not appear, check for **Your role has no dashboard**.
4. Read **Kindly, Contact your administrator to define a dashboard** when that instruction appears.

Result: The Dashboard opens with the dashboard library or the no-dashboard message visible.





Choose a widget catalog

Choose a widget catalog according to the information you need to review. The three catalogs cover different families while sharing the same dashboard-tab surface.

If you need to review...	Choose this catalog	It groups...
Top-ranked or comparative views	Top widgets	Sibling top widgets and their dashboard-tab consumers
Sales activity, booking, or backlog views	Backlog widgets	Sibling backlog widgets and their dashboard-tab consumers
Cash, ranking, aging, bonus, or other management views	Management-report widgets	Sibling management-report widgets and their dashboard-tab consumers

The active dashboard displayed the role label Sales Manager and the widget titles **Sales Pipeline, Booking This Year, Accounts in Sales Pipeline, Teams Booking vs. Target,** and **Backlog**. The catalog has no fields for you to enter.

After choosing a family, use [Find and inspect a widget](#) to locate a widget on the active tab.

Find and inspect a widget

Finding a widget means locating it on the active tab and checking its displayed title before you work with it. Use the active tab's search when it is available; use the visible widget controls when you are reviewing the current tab.

Prerequisites

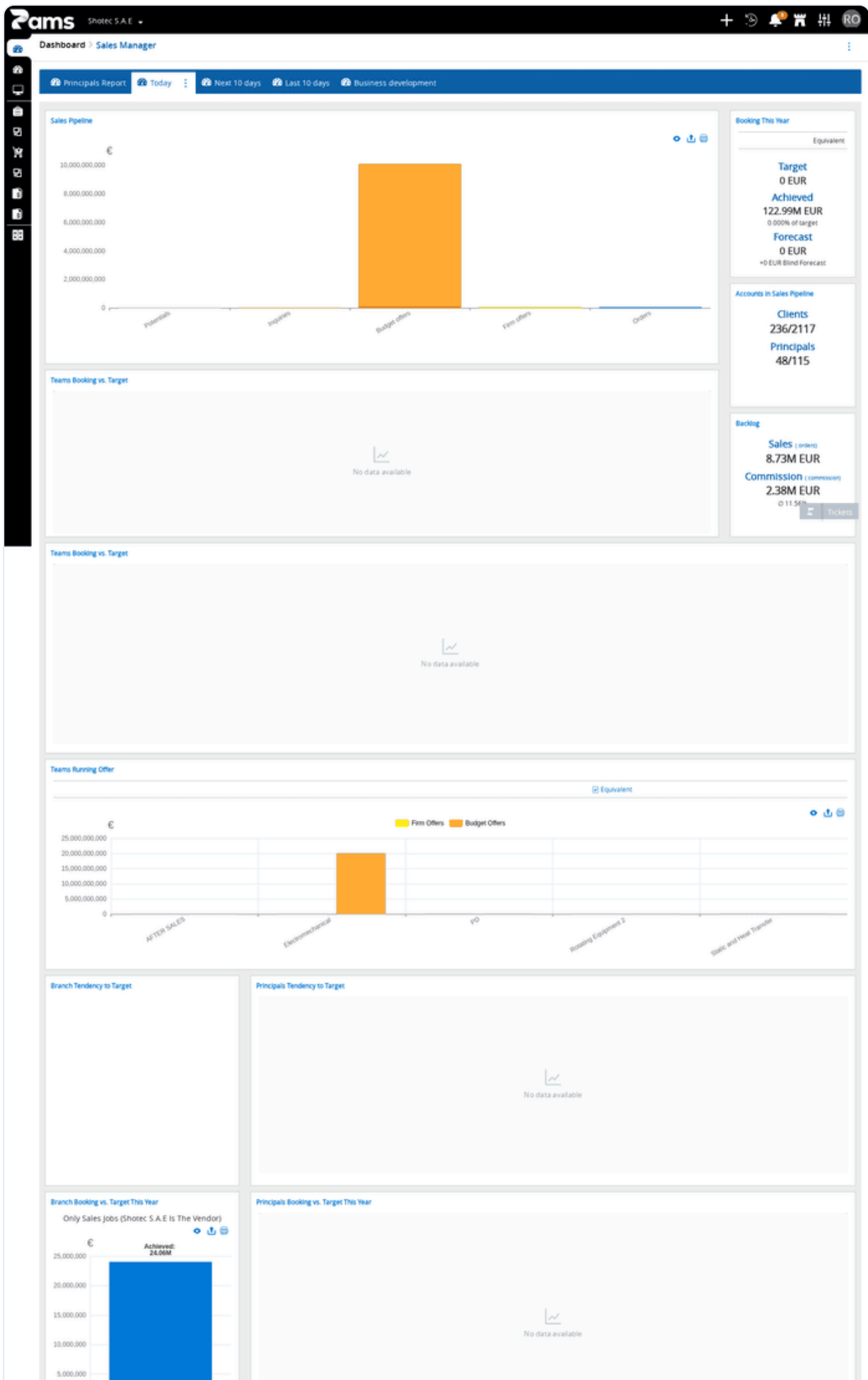
- The Dashboard is open.
- The active tab contains the widgets you want to review.

Steps

1. Review the widget titles on the active tab.
2. Use **Search for widget** to search the widgets already on the active tab.
3. In edit mode, select **Remove widget from tab** when you need to remove the selected widget.
4. Review **Sort by Booking**, **Sort by Target**, and **Sort by Achievement** when those inputs appear.

Result: You can identify the widget you need on the active tab and use the available search, sort, or edit control.

To change the tab, continue to [Add a widget and save the tab](#).





Add a widget and save the tab

Adding a widget places another available card or chart on the active tab. Save the arrangement when the tab contains the widgets you want to keep.

Prerequisites

- The Dashboard is open on the tab that should receive the widget.
- You are in edit mode.
- The widget is available to your subscription and is not already selected on the active tab.

Steps

1. Select **Add new widget**.
2. Select the widgets to add:

If you need to...	Do this
Add every available row	Select Select all .
Add only chosen widgets	Select the widgets you want.

3. Select **OK** to add the selected widgets and close the dialog.
4. Drag the widgets into the order you want on the active tab.
5. Select **Save**.

After a successful save, PAMS displays `Your request was completed successfully` .

Result: The active tab contains the selected widget arrangement.

Handle catalog availability branches

The available catalog actions change with the dashboard's subscription, active-tab, edit-mode, and empty-dashboard conditions. Use the visible branch to decide what to do next.

Prerequisites

- The Dashboard is open.

Steps

1. Compare the surface you see with the branch that applies:

If you see...	Continue by...
A subscription-upgrade surface	Confirm that the dashboard feature is included before using the widget library.
Your role has no dashboard	Follow Kindly, Contact your administrator to define a dashboard .
A widget picker with already-selected widgets omitted	Choose from the remaining available widgets.
A dashboard in edit mode	Use the available arrangement and widget controls.

2. Return to [Choose a widget catalog](#) when the dashboard library is available.

Result: You know which dashboard surface and catalog actions are available for the current configuration.

If **Search for widget** does not appear on the active tab or **Add new widget** does not appear in the edit-mode picker, use [When the catalog does not show what you need](#).

When the catalog does not show what you need

Use the message on screen to identify the branch that stopped the action. The available-widget

picker and widget search are separate actions: a widget can be unavailable because it is already

on the active tab or because the subscription does not include it.

Message	What it means	What to do
An error occurred while processing your request	The dashboard request returned an error.	Review the active tab and try the action again.
You've exceeded the number of tabs	The tab limit was reached.	Continue with an existing tab.
You already have a tab with the same name	The tab name is already in use.	Use a different tab name.
You already have this widget in this tab	The widget is already selected on the active tab.	Review the active tab instead of adding another copy.

Use the widget titles visible on your current tab, then continue to the page that matches your next task.

Continue from the catalog

The catalog helps you select a widget family and locate a widget; the linked pages own the next

focused review or the wider dashboard explanation.

Prerequisites

- You have identified the widget family or the broader dashboard task you want to continue.

Steps

- Choose the next destination:

If you need to...	Open...
Understand the wider dashboard surface	Dashboard overview
Review sales, booking, or backlog widget maps	Sales and backlog widgets

If you need to...	Open...
Review pipeline and status widget maps	Pipeline and status widgets
Review management-report widget maps	Management report widgets
Configure dashboard settings	Dashboard settings

Result: You are on the page that owns the next dashboard review or configuration task.