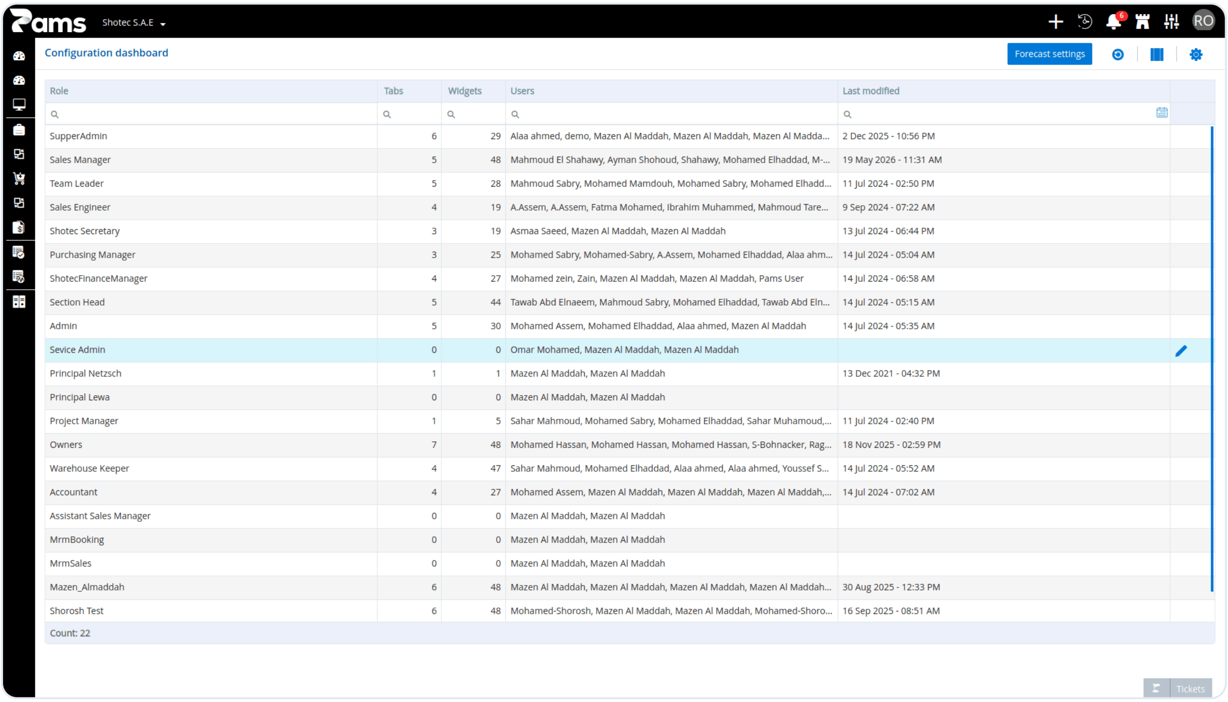
PAMS V2

Dashboard Settings

July 29, 2026

Dashboard Settings

Applications › Configurations › Dashboard Settings



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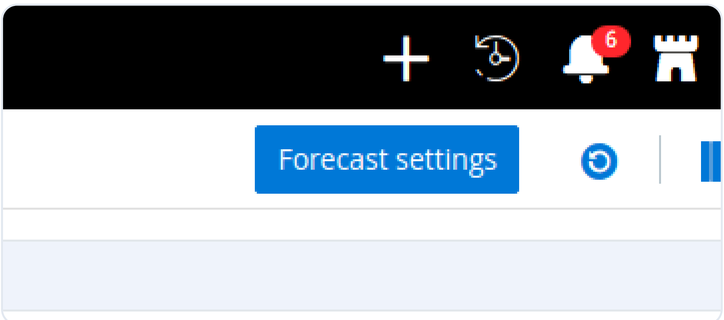
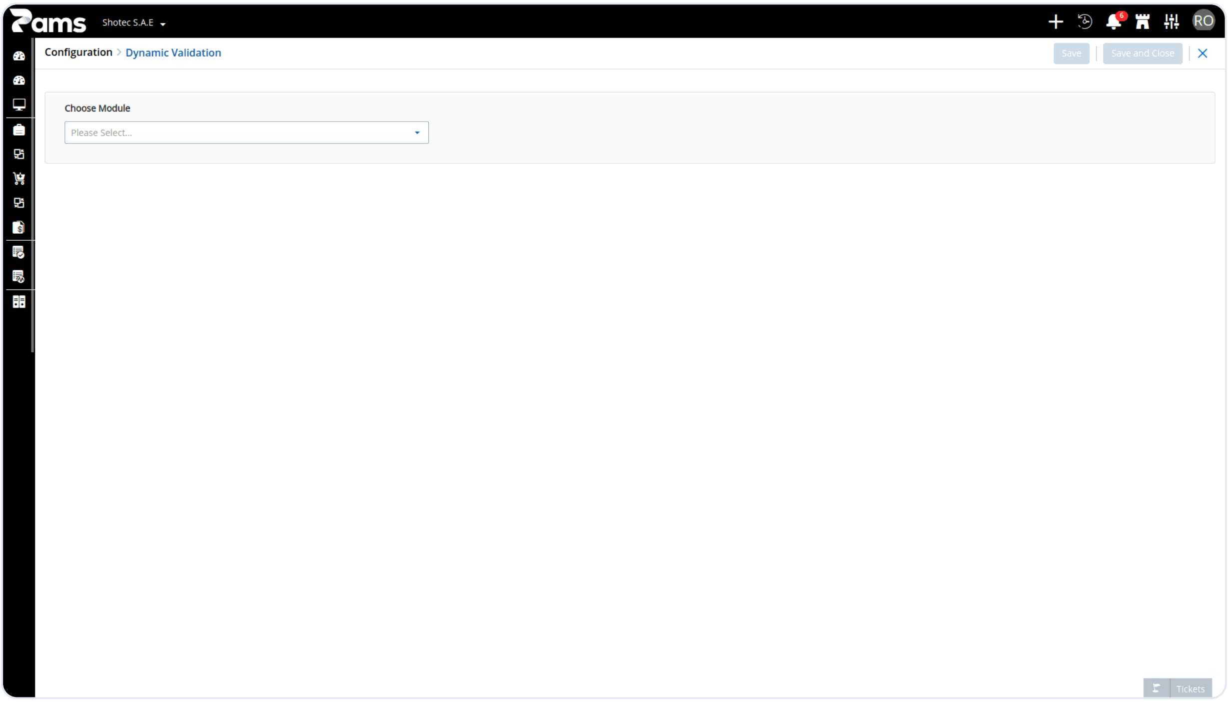


Overview

Dashboard Settings is used to manage dashboard layouts and related settings for the business applications available in the platform, including Sales, PM, Purchasing, Warehouse, and Finance. Use this feature when you need to create a layout, update the current layout, return to the standard layout, or remove an obsolete layout. It is typically used by managers and users responsible for maintaining role-based dashboard views.

Settings

Open **Configurations** > **Dashboard Settings** to work with dashboard layouts.



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Use the available controls to identify and maintain the layout you need:

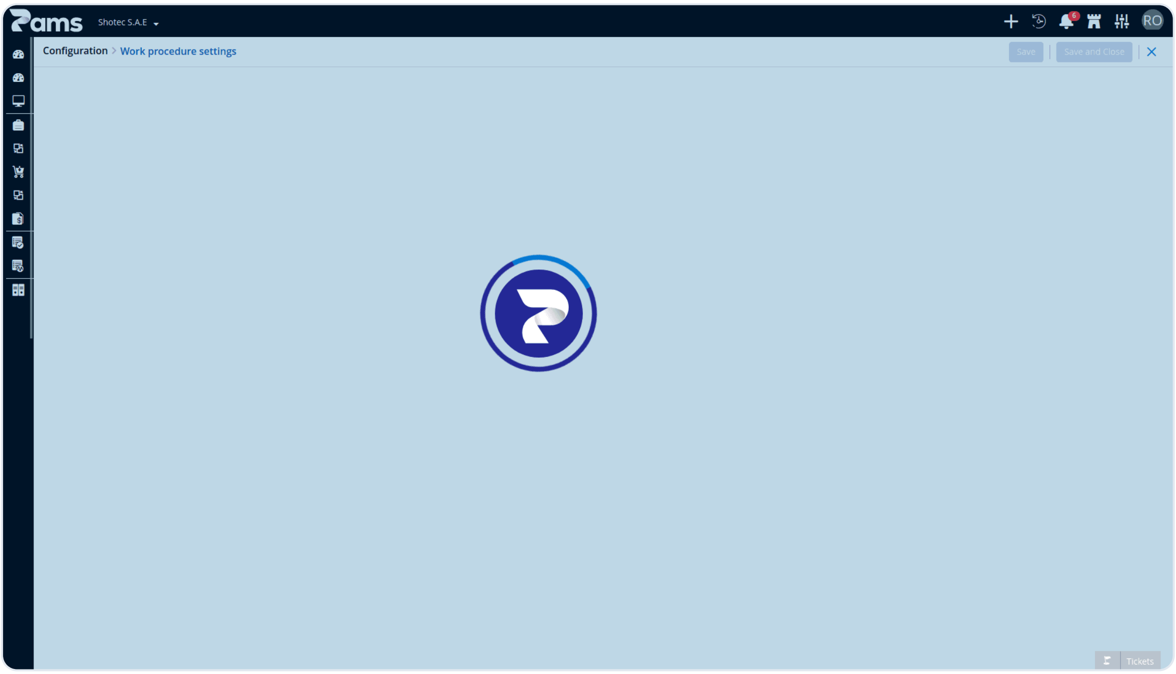
Control	Purpose
Layout name	Identifies the dashboard layout.
Search	Finds a layout or setting record.
Files (files[])	Displays the available file field for the dashboard settings record.
Forecast settings	Opens the available forecast-related settings.
Standard Layout	Selects the standard dashboard layout option.
Add Layout	Starts a new dashboard layout.
Save	Saves a new layout or the current changes.

Control	Purpose
Update Current	Updates the currently selected layout.
Delete Current	Removes the currently selected layout.
Delete	Performs the available delete action.
Columns Chooser	Opens the available column-selection control.
Update icon (icn-update)	Provides the available update icon action.
Layout icon (icn icn-layoout)	Provides the available layout icon action.
Settings icon (icn icn-settings)	Provides the available settings icon action.

> **Note:** Use a clear, role-oriented value in **Layout name**, such as “Sales Manager Dashboard”, so that users can identify the intended layout when several layouts exist.

Workflow

1. Open **Configurations** > **Dashboard Settings** and use **Search** to locate an existing layout when you intend to revise or remove it. If you are creating a layout, select **Add Layout** instead.



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2. Decide whether to use the standard layout or create a separate layout.

    - To work from the standard option, select **Standard Layout**.
    - To create a separate layout, select **Add Layout** and enter a value in **Layout name**.
    - To abandon the current action before saving, select **Cancel**.
3. Decide which application areas the dashboard must support. Review the available application controls, including **Dashboard**, **Reports**, **My Desk**, **Sales**, **PM**, **Purchasing**, **Warehouse**, **Finance**, **Tasks**, **Activities**, **Data**, and **Search box**. Use **Select** where it is available to choose the applicable item, and use **edit** where it is available to revise it.
4. Review the layout-related settings before saving. Use **Columns Chooser** when you need to work with the available column-selection control. Use **Forecast settings** when forecast-related settings are required for the layout.
5. Decide whether the work is a new layout or a revision to the current layout.
    - For a new layout, select **Save**.
    - For a selected existing layout, select **Update Current** to apply the changes to that layout.
    - Use the **Update icon (icn-update)** only when the icon action is the appropriate available update control.
6. Decide whether a layout should remain available.
    - Keep the layout by saving it or updating the current layout.
    - Remove the selected layout only when it is no longer required by selecting **Delete Current**.
    - Use **Delete** only for the available delete action shown on screen.

> **Warning:** Do not select **Delete Current** until you have confirmed that the currently selected layout is the one you intend to remove.

Customize Mandatory Fields

The **customize mandatory fields** tab contains dashboard-setting records associated with roles and their dashboard content. The available record information includes **Role**, **Tabs**, **Widgets**, **Users**, and **Last modified**, allowing you to identify which role has a particular number of tabs, widgets, and users and when the record was last changed.

Use this tab to review the role-level dashboard records before deciding whether to edit the selected layout. The available controls include **Select** and **edit**; no separate control is provided to move records into or out of this tab.

Work Procedure Settings

The **work procedure settings** tab displays the work-procedure-related dashboard-setting records. As in the preceding tab, the visible information identifies the relevant **Role**, **Tabs**, **Widgets**, **Users**, and **Last modified** values, helping you review the scope and maintenance history of each role record.

Use this tab when reviewing dashboard settings that relate to work procedures. You can use the available **Select** and **edit** controls where shown; no separate control is provided to move records into or out of this tab.

Examples

A Sales Manager needs a separate dashboard layout for reviewing sales-related work.

1. Open **Configurations** > **Dashboard Settings**.
2. Select **Add Layout** and enter `Sales Manager Dashboard` in **Layout name**.
3. Review the available application controls and select the sales-related content required for the layout, such as **Sales**, **Reports**, **My Desk**, **Tasks**, and **Activities**.
4. Open the **customize mandatory fields** tab and review the role-level records using the **Role**, **Tabs**, **Widgets**, **Users**, and **Last modified** information. Use **Select** and **edit** where available to work with the relevant Sales Manager record.
5. Review the **work procedure settings** tab to confirm that the applicable role record is included in the work-procedure view.
6. Select **Save** to create the layout. If the layout is already selected and you are revising it later, select **Update Current** instead.

Tips

> **Tip:** Use **Search** before creating a layout to avoid creating a duplicate layout for an existing role.

> **Tip:** Review both **customize mandatory fields** and **work procedure settings** when maintaining a role-based dashboard, because each tab presents role, tab, widget, user, and modification information.

Troubleshooting

Symptom	Likely cause	Fix
The required layout is not visible.	A search value may be filtering the list.	Clear or revise **Search**, then locate the layout again.
Changes to an existing layout are not reflected.	The layout may not have been updated after editing.	Select the required layout and use **Update Current**.
A new layout is not available after entry.	The new layout may not have been saved.	Confirm **Layout name** is entered and select **Save**.
The wrong layout is selected for removal.	The current layout was not reviewed before deletion.	Stop before using **Delete Current**, locate the correct layout with **Search**, and verify the selected record.

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