NOTES

- Dashboards are in setup, so user must have clinical setup access.
- Dashboard scoping is directly related to the scope of the staff position for which you are creating the dashboard.
- You must create the same dashboard for each position who will need access to view or print it.
- Users require security to dashboard panes selected in the layouts. Users who do not have security do not see the dashboard pane.

Procedure

1. Do one of the following:
   - Multi-facility: Management Console > Standards > Care Management > Standard Dashboard Layout.

At this point, you can either edit existing resident dashboards if you have created them already and add NEW VIEW or create a new dashboard.

2. For existing resident dashboards, click edit (go to step 5), for new click New Layout.
3. Select Position
4. Select Resident as Dashboard type.

5. Select New View to add to existing resident dashboards.
6. Change the Current View Description to “Resident Summary” or your preferred language.
7. Check the panes that you want on the view.
8. Move them into order by clicking and dragging the panes on the screen.
9. Click Save.
10. Click Enforce to assign newest changes to existing positions.

**Hints and Tips**

- Panes in each view can be dragged and dropped into side by side or standalone positions.
- The timeskikes two (x2) indicates that the pane covers the entire width of the page.
- Enforcing dashboard layouts to a position forces the layout setup to all users. Users with security can edit their own layouts and view.