



DASHBOARD SET IMPLEMENTATION GUIDE

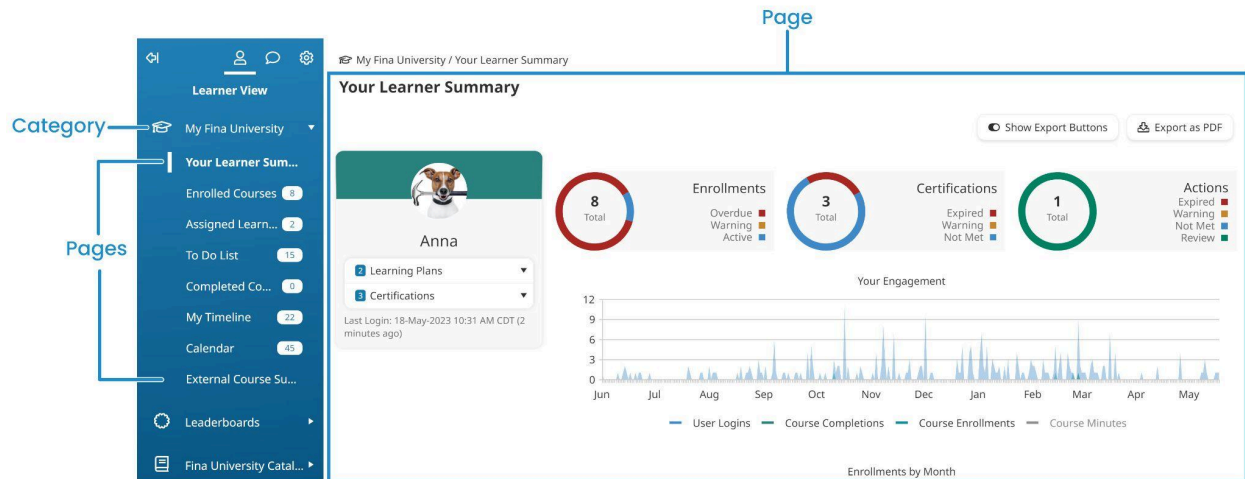
Last Updated: January 18, 2024

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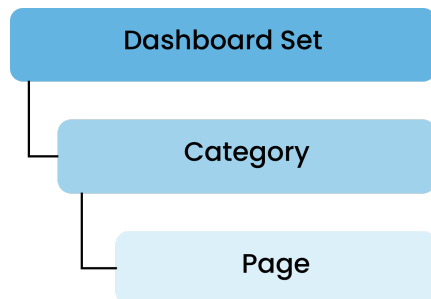
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About This Guide

Using dashboard sets, you can customize how the learner interface displays.



A dashboard set contains one or more categories. These display as the menu options in the learner interface. Each category contains one or more pages.



Each user will see one dashboard set which is assigned to them through their [home group](#). If no dashboard set is assigned to their home group, the user will see the account's default dashboard set.

NOTE: Each account includes a [default dashboard set](#). The ability to create additional dashboard sets will depend on your account's plan type. Contact our [Success Desk](#)® if you have any questions.

This guide explains the four key steps to implement a dashboard set:

- [Planning a dashboard set](#)
- [Setting up a dashboard set](#)

- [Testing a dashboard set](#)
- [Changing a dashboard set's scope of availability](#)

Planning a Dashboard Set

Before you begin building a dashboard set in SmarterU, you'll want to take some steps to identify who will be using the dashboard set and what it should look like.

NOTE: A [worksheet for planning your dashboard](#) set is available.

Identifying a Dashboard Set's Users

Knowing who will be using a dashboard set can help you determine what content it should include and how to organize it best. Will the dashboard set be used by all users in your account, or is it specifically for users in a certain home group?

For example, maybe you want to create a dashboard set for users in your Technical Sales group. In addition to giving these users access to their courses, you might also want to provide them with easy access to a knowledge base that contains your products' technical specifications. Or, perhaps you want to create a dashboard set for users in your Management and Human Resources groups that includes charts that summarize the status of enrollments and certifications.

For users who don't belong to one of these groups, you may want to create a dashboard set that lets them access their course enrollments, view their point standings, and enroll in supplemental training.

After completing this analysis, you may realize that you actually need to set up multiple dashboard sets. If so, you'll want to complete the remaining steps for each dashboard set.

Identifying the Content

After identifying who will be using a dashboard set, you need to decide what content you want to display. With this knowledge, you'll be able to identify the pages you'll add to your dashboard set. The table below lists some of the information you can include in a dashboard set.

If you want to allow users to ...	Then you may want to include a ...
Access their course enrollments	Course enrollments page
Self-enroll in courses	Course catalog
Self-enroll in learning plans	Learning plan catalog
Visualize their course completions during a date range	Timeline
See how their earned points measure against other users, or users in other home groups	Leaderboard
Drill down into an assigned learning plan to view its certifications, requirements, courses, and actions	Structured learning plan
View courses by month, week, or day	Course calendar
Record courses or training they've taken outside of SmarterU	External course submission
Access a resource library consisting of articles and files	Knowledge base
View a summary of their enrollments, certifications, actions, and engagement	Learner Summary

You can also [add custom pages](#) to a dashboard set that display different types of content on one page. For more ideas on the kinds of pages you can include in a dashboard set, refer to [Dashboard Set Page Examples](#).

Home / Welcome: Sales Associates

Welcome: Sales Associates

Click the **Start** button on any course to begin.

Questions? Please reach out to [your Trainer](#).

Sales Associate Training

Welcome to the Sweet Home Electronics team!

As you work your way through the courses below you will see your progress bar fill in. Once you reach 100% you'll have completed your onboarding training and be ready for your probationary review.

Please direct any questions you may about your courses to your [Training Team](#).

To Do

First Aid Certificate Upload

Theft Prevention

Till Demonstration - Closing

Welcome to Sweet Home Electronics

Done

Active Shooter Preparedness

Basic First Aid

Bomb Threats - How to Respond

Respect in the Workplace

SHE Customer Service Standards Expires: 29-Dec-2023

SHE Selling Skills Expires: 29-Dec-2023

Store Closing Procedures Expires: 29-Dec-2023

Store Opening Procedures Expires: 29-Dec-2023

Leaderboard

Points are accumulated based on (GMT-6:00) - Canada/Central, as of 23-Mar-2023.

SHE Product Knowledge Leaderboard

The first Sweet Home Electronics employee to reach 200 Product Knowledge Points will receive a \$200 gift card!

1	Aarne Koppel	25000 points
2	Isabel Beaulieu	12397.5 points
3	Jia Wong	130 points
4	Maya Lazar	90 points
5	Ethelbert White	70 points
6	Ulises Idowu	60 points
7	Managed Services Neovation	40 points
7	Hajar Ahmad (You)	40 points
7	Claudio Calvo	40 points

Product Knowledge Training

Apple Product Knowledge

Lenovo Product Knowledge

Samsung Product Knowledge

View

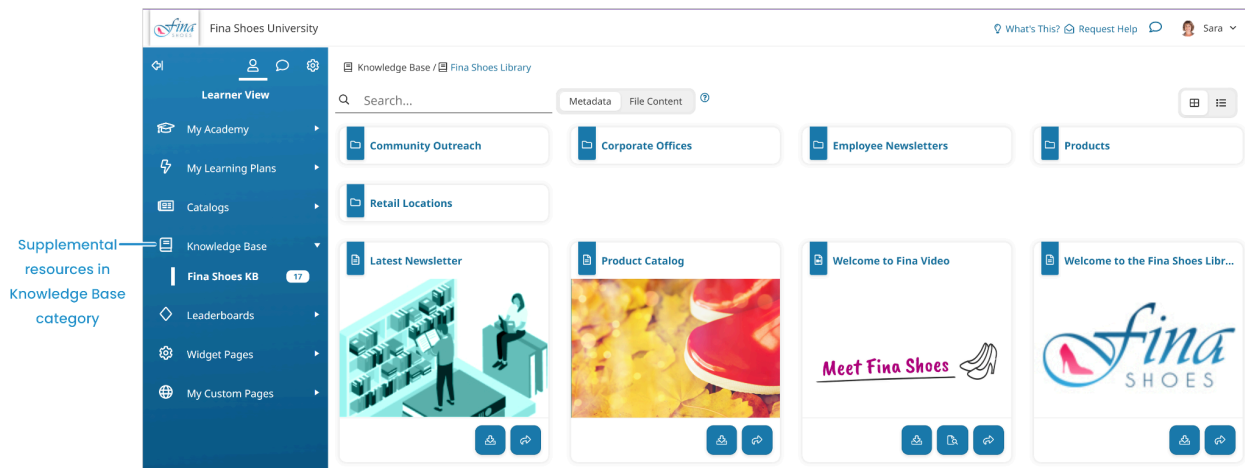
1 - 3 of 3 items

Plan the Content's Organization

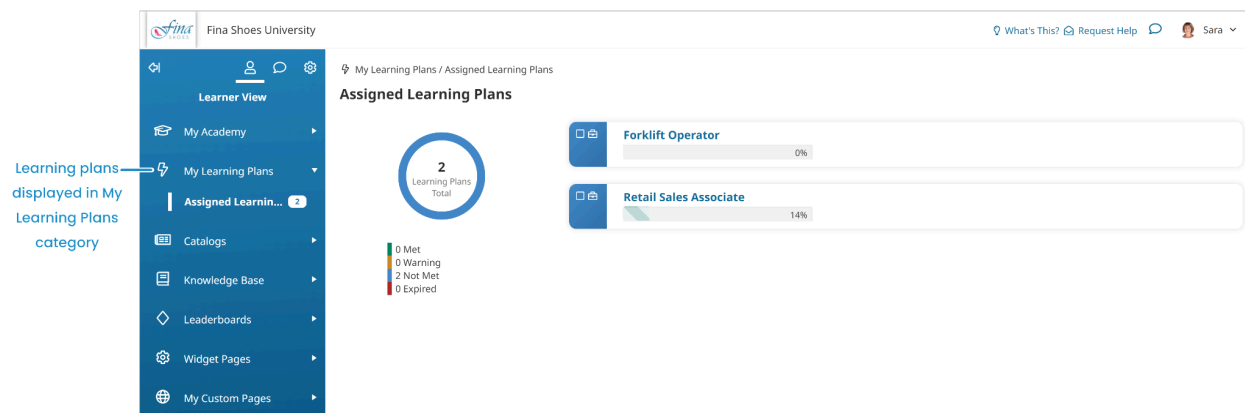
After you've identified the content you want to include in the dashboard set, the next step is to think about how you want to organize the content.

From a high level, you'll want to consider what pages you want to display together under a category. For example, you might want all supplemental resources for Fina Shoes (i.e.,

knowledge base files and articles) to be displayed together under the Knowledge Base category.



You may also want to display all content related to a user's assigned learning plans together under the My Learning Plans category.



The organization you decide on will define the categories (i.e., menu options) for the dashboard set.

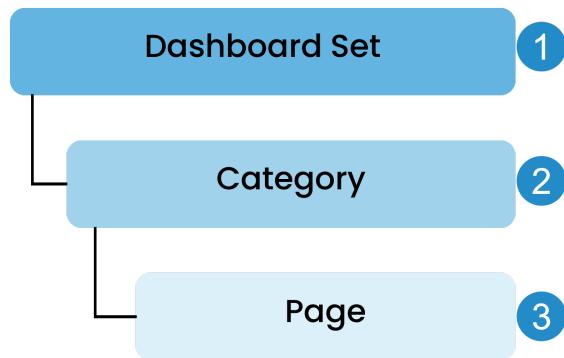
NOTE: A page can only be included in one category and in one dashboard set.

Setting Up a Dashboard Set

Once you've identified a dashboard set's users, content, and organization, it's time to build it using [SmarterU's Learner Dashboard Builder](#).

NOTE: The Learner Dashboard Builder is only accessible to [administrators and owners](#).

When you set up a dashboard set, you'll want to take a top-down approach. In other words, you'll want to add the dashboard set, then add categories to it, then add the pages.



Adding a Dashboard Set

[Adding a dashboard set](#) is a straightforward process. You can specify a few options, such as whether you want to give users the [ability to change the language and theme](#). You can also control [where the account's logo and name are displayed](#). If your account has [home group branding enabled](#), you can also display the user's home group logo and name.

NOTE: If your account only allows for one dashboard set, you can [edit](#) the [default dashboard set](#) included with SmarterU.

If you're adding a dashboard set for specific groups, we recommend setting the [dashboard set's scope of availability](#) to one of those groups. After completing [testing](#), you'll assign the dashboard set to the remaining groups.

Adding Categories to a Dashboard Set

A dashboard set needs to include at least one category. When you [add a category](#), you can [select an icon](#) and [customize the text that's displayed for the category in the learner interface](#). For example, suppose we have a category named *User Summary*.

Add/Edit Set Category

✓ Save

↺ Cancel

» Fina Shoes Dashboard Set

Main

Name:

User Summary

Status:

Active

Inactive

No Data Hide:

Yes

No

Select an icon to represent this category:

If we want the learner interface to display *My University* instead of *User Summary*, we can [set the text for the category's English label](#) to *My University*.

Add/Edit Set Category

✓ Save

↺ Cancel

» Fina Shoes Dashboard Set

Main

Labels

Language:

English

Text:

My University

×

+ Label

Pages

Label text controls what's displayed in learner interface

↶

👤

Learner View

🎓

My University

▶

🏆

Leaderboards

▶

📖

Fina University Catalogs

▶

📚

Knowledge Base

▶

⚙️

My Custom Views

▶

🏠 My University / Your Learner Summary

👤

Anna

2 Learning Plans

3 Certifications

Last Login: 30-May-2023 12:50 PM CDT (16 minutes ago)

You can also specify the text to display when users view the category in different languages.

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Adding Pages to a Category


When you [add a page](#) to a category, you'll need to specify the [type of content](#) you want it to display (the content you identified in the [Identifying the Content step](#)).

SmarterU provides several different page types that you can configure to suit your users' needs. Each page type has a number of different configuration settings that enable you to customize what's displayed.

For example, you can set up two course type pages. You can configure one page to display the courses available to the user for self-enrollment (i.e., a course catalog) and the other page to display the courses they're already enrolled in.

SmarterU also enables you to display multiple kinds of content on a single page using the [custom page type](#). You can create custom pages using [SmarterU's Custom Page Builder](#).

Changing the Order of Categories and Pages

After adding categories and pages to a dashboard set, you can change the order in which they're displayed by clicking the  icon and dragging the [category](#) or [page](#) to a new position.

NOTE: You can change the order of pages within a category, but you cannot move a page from one category to another.

Testing a Dashboard Set

After you've created a dashboard set and its categories and pages, you'll want to test it by logging in as one of the users from the group that you assigned it to in the [Adding a Dashboard Set step](#).

Some of the things that you should confirm while testing your dashboard set include:

- Intuitive navigation
- Clear labels
- Logically grouped content

- Courses displayed
- Knowledge base access

If you find any issues with the dashboard set, you'll want to [edit it](#), [its categories](#), and/or [pages](#).

Changing a Dashboard Set's Scope of Availability

After you test a dashboard set and address any issues that you find, you can set its [scope of availability](#) to the home group(s) you identified in the [Planning step](#). Once a user's home group has a dashboard set, it will take precedence over the account's default dashboard set. For example, suppose Dan's home group is HR. In addition to your existing dashboard set for the account, you create a new dashboard set and set its scope of availability to HR. Dan will now see the HR dashboard set and not the account's dashboard set.

NOTE: *If you need to make changes to a dashboard set, your changes will be immediately visible to any users who are using the dashboard set.*

After changing the dashboard set's scope of availability, you should [re-test the dashboard set](#) to verify your changes.

Appendix

Dashboard Set Planning Worksheet

Who will be using the dashboard set?

- ☐ All account users
- ☐ Users in specific home groups (list the groups below)

What categories (i.e., menu options) do you want the dashboard set to include?

What kind of content should be included in the dashboard set?
The first row in the table below has been provided as an example.

Category	What's displayed?	SmarterU Page Type Available page types	Notes
My Learning	The user's course enrollments	Course page	Display the courses in a list by default, but allow users to switch to a tile view.