

# Dashboard Quick Start Guide

This Quick Start Guide provides a brief step by step outline on how to quickly get started with Dashboard for those that are already familiar with CDD.net or new users that wish to get started with minimal steps. A more detailed explanation of Dashboard and its options can be found in the Dashboard User Manual found on the Dashboard Home Page.

See the CDD User Manual for a more detailed explanation on how to run, print, convert to pdf, or export to Excel using the CDD reports.

## Step 1 - Add the Dashboard URL as a Trusted Site within Internet Explorer

1. Launch Internet Explorer
2. Go to: Tools, Internet Options, Security Tab
3. Click the Trusted Site icon and then click the Sites button.
4. Uncheck the “require server verification (https)” check box.
5. In the box “Add this website to the zone”, enter: <http://dashboard.uei.csus.edu>
6. Click Add button.
7. Click all Close buttons to exit.

## Step 2 - Log into Dashboard


1. Launch Internet Explorer
2. Go to: <http://dashboard.uei.csus.edu>
3. Login using your IFAS User ID and Password. (CDD.net users: use the same User ID and Password you used for CDD.net).
4. Displays the Dashboard Home Page

## Step 3 - Update Your Home Page

1. From the Dashboard Home Page, click “Change Content” in the blue title bar.
2. Select one or both Company Announcement(s):
  - University Enterprises, Inc. (UEI) – for non “X” accounts
  - University Foundation at Sacramento State (USFF) – for “X” accounts
3. Select the appropriate “Information Center” and “Announcements” for your user group. Only those that are appropriate for your user group will be shown.
  - PI/Project Administrators
  - Student Employment Services (SES only)
  - University Foundation – Campus Users (UFSS)
4. Select other content options as desired.

5. Click Save button to save selections.
6. Use “Change Layout” to reorder or move content to different columns as needed.
7. Click “Home” to return to the Home Page

#### Step 4 - Display Public Favorite Tab Specific to Your User Group

1. Select Preferences – move the mouse over the Favorites icon  in the upper, right corner to view a drop-down menu. Select Preferences to display a pop-up window to add/remove Preferences.
2. Select the check box that represents your user group. Click Save to save selection.

<u>Check Box</u>	<u>User Group Description</u>
PI/Project Admin .....	PI’s, Project Administrators, other faculty and staff that need access to the University Enterprises accounts that are administered by Research Administration and Contract Administration excluding Student Employment Services.
SES .....	State and local government agencies and other participating organizations that need access to the University Enterprises accounts that are administered by Research Administration and Contract Administration. Student Employment Services only.
UFSS.....	All users that have access to the University Foundation at Sacramento State “X” accounts.

After “saving” your selection, Internet Explorer should automatically refresh (press the F5 key to manually refresh) and the tab for the Preference selected will then be displayed. If it doesn’t, move the mouse over the Preferences drop-down menu. The favorite just selected should be listed. If it does not show a check mark next to it, select it with a mouse click.

#### Step 5 – Select and Run CDD Reports or View Documentation

1. Click on the Public Favorite Tab chosen in step 4.
2. To run a CDD report, select “Reports and Inquiries” in the blue title bar to view available reports. Clicking on a report will cause the report prompts to be displayed.
3. Select “Documentation” in the blue title bar to access all general and report specific user reference documentation. Click on the report title to view the pdf file.

#### Step 6 – Other Important Items

1. Change your temporary password to one of your preference. See “Changing Your Password” described in the Dashboard User Manual.

2. Read the “Summary Description of Reports” and “Glossary and Explanation of Terms” in the Documentation section for a brief description of each report and terms used.
3. Turn off pop-up blockers for “dashboard.uei.csus.edu”. Pop-up blockers will prevent a CDD report from being displayed.
4. The first time a CDD report is run a message will be displayed requesting that you download an ActiveX control from SunGard-BiTech. This must be done to allow printing of the CDD report. A security message will be displayed if the ActiveX control is not installed.
5. To bookmark the Dashboard login page, the URL saved must be exactly <http://dashboard.uei.csus.edu>. All characters after the .edu must be removed by editing the bookmark properties. Not removing these characters can inhibit successfully logging in or running reports.