

# Customize a Widget

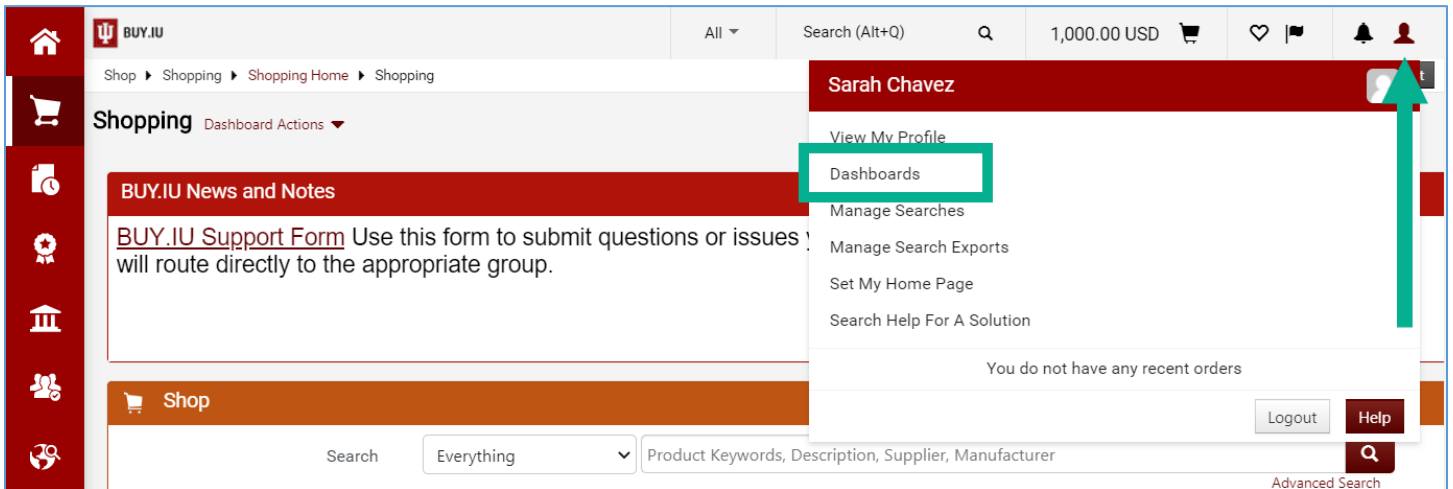
A widget displays search results in real-time on a dashboard you create. You can customize these widgets with different colors, display formats, and display columns.

## Contents

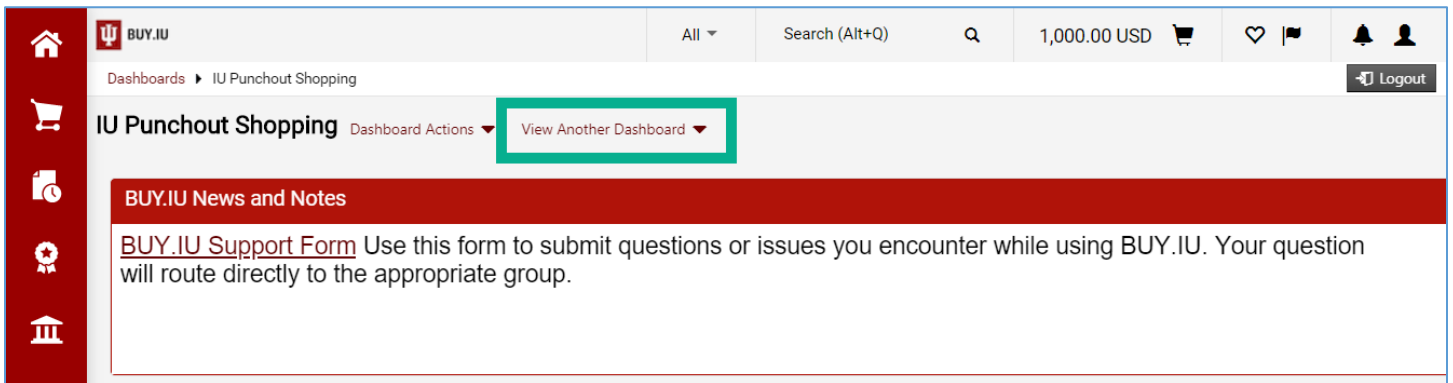
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## Locate a Dashboard

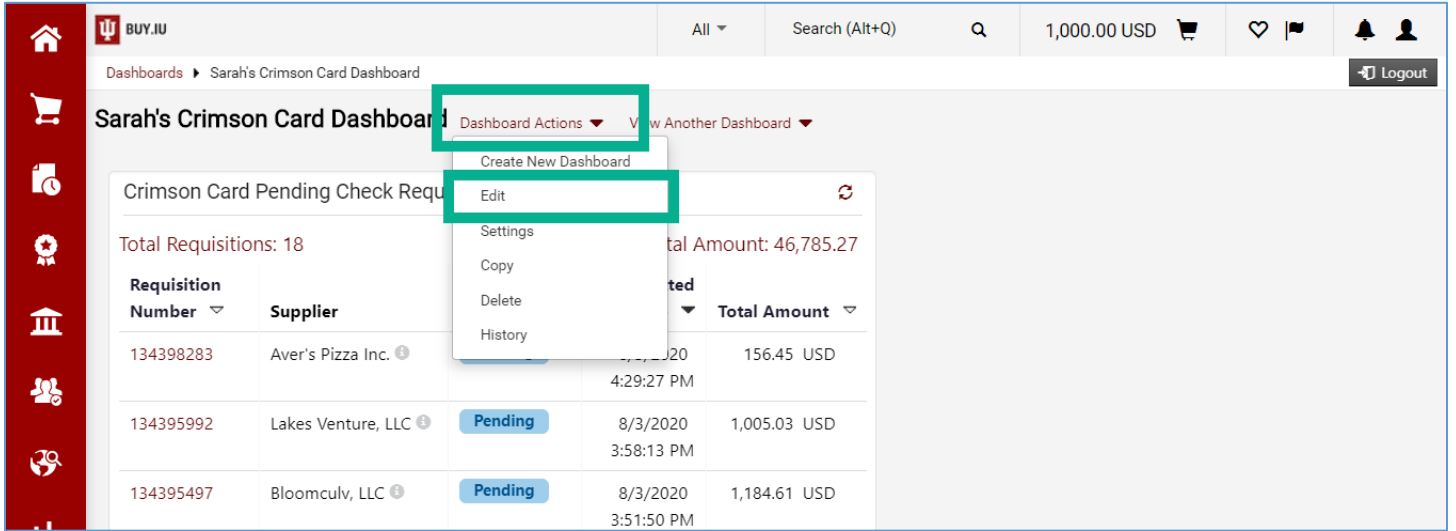
Access a dashboard by clicking the **profile icon** in the upper right-hand corner, then selecting **Dashboards**.



Next, click **View Another Dashboard** and locate the dashboard you wish to customize.

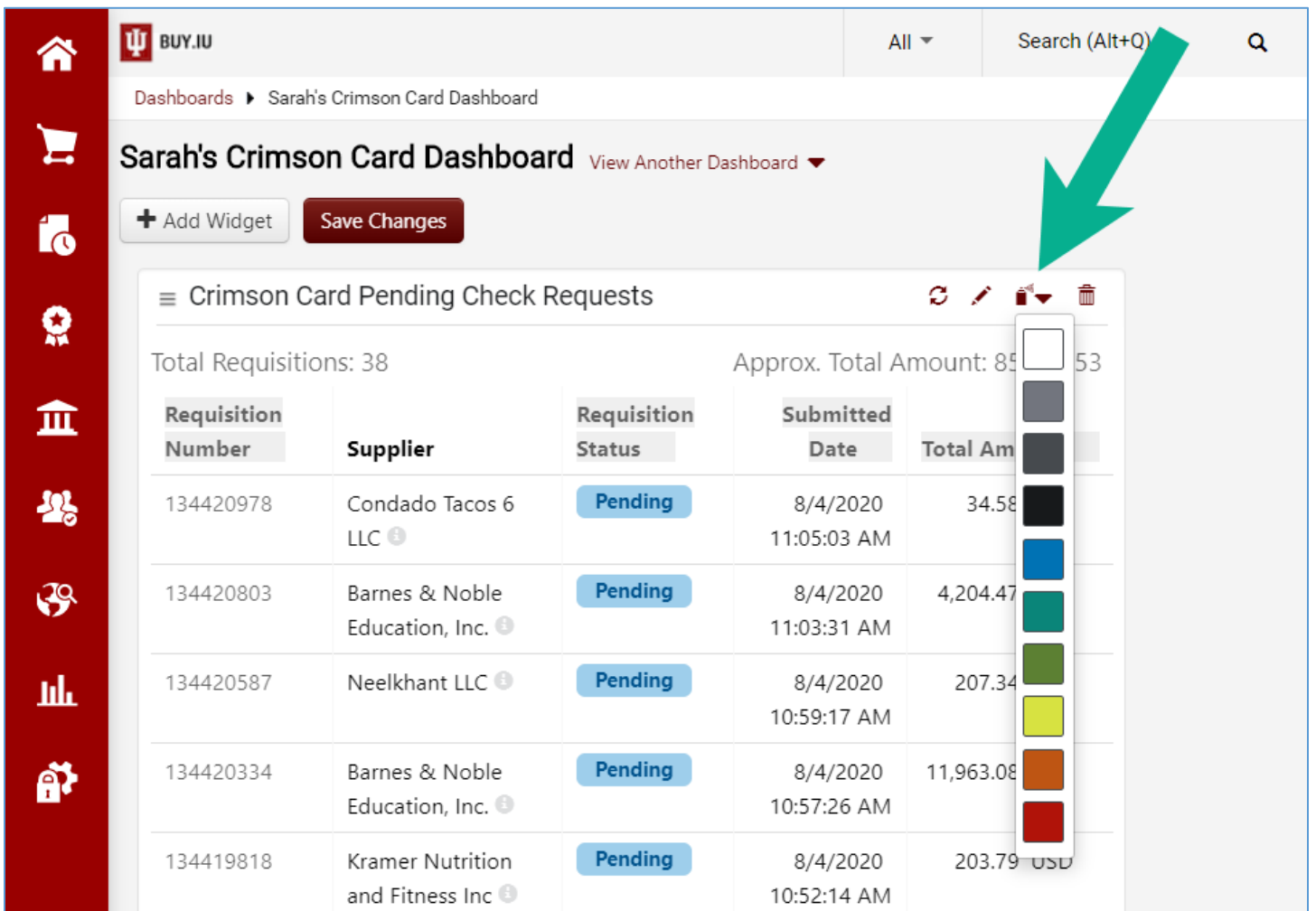


Select **Dashboard Actions**, then **Edit** to customize widgets.



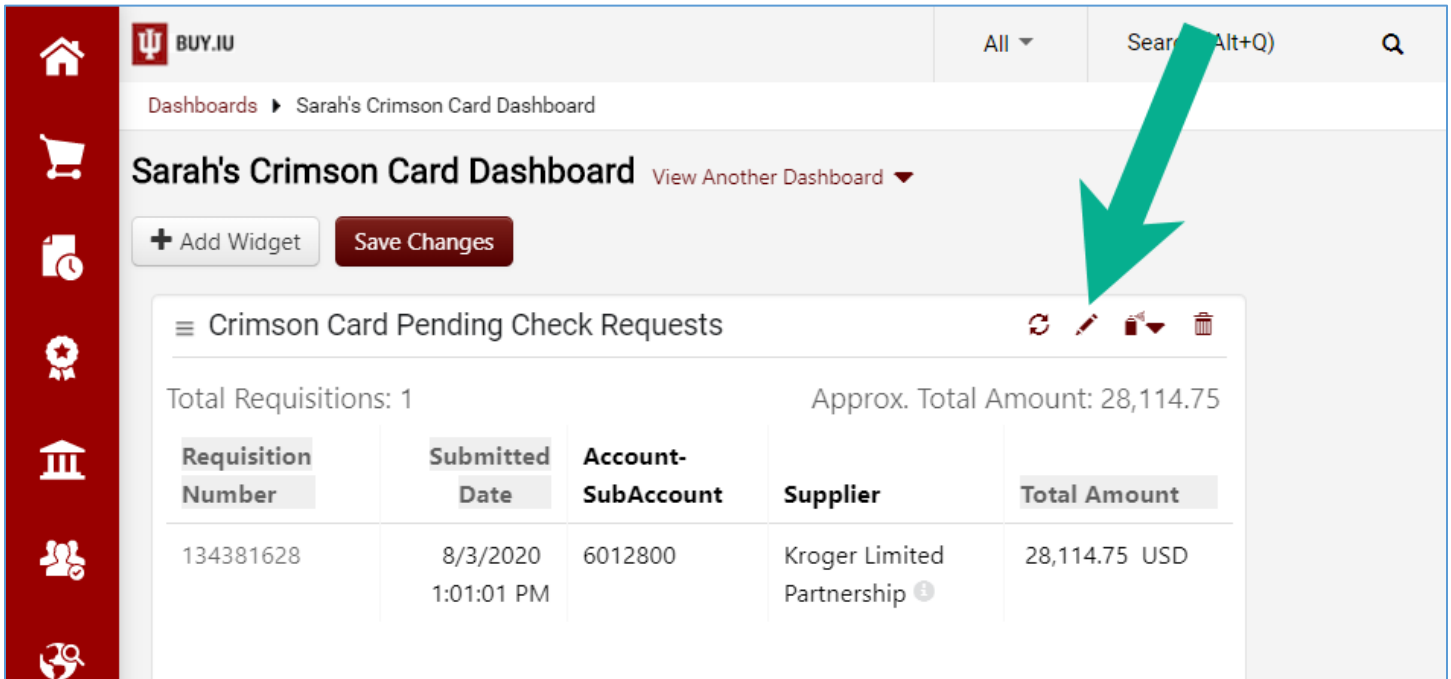
## Change Widget Color

Click the **spray paint icon** in the upper right-hand corner of the widget to change the color of the widget.



## Edit How Widget Data is Displayed

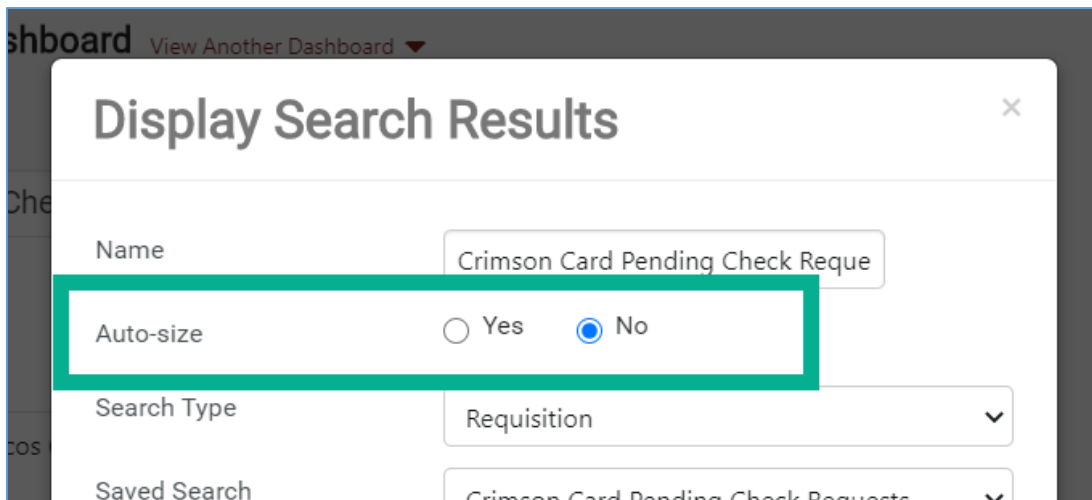
Click the **pencil icon**, next to the spray paint icon, to edit how information is displayed. There are several options available to customize how widgets can be manipulated on your dashboard and what information is displayed.



Click **Save Changes** after making any of these selections to update the widget.

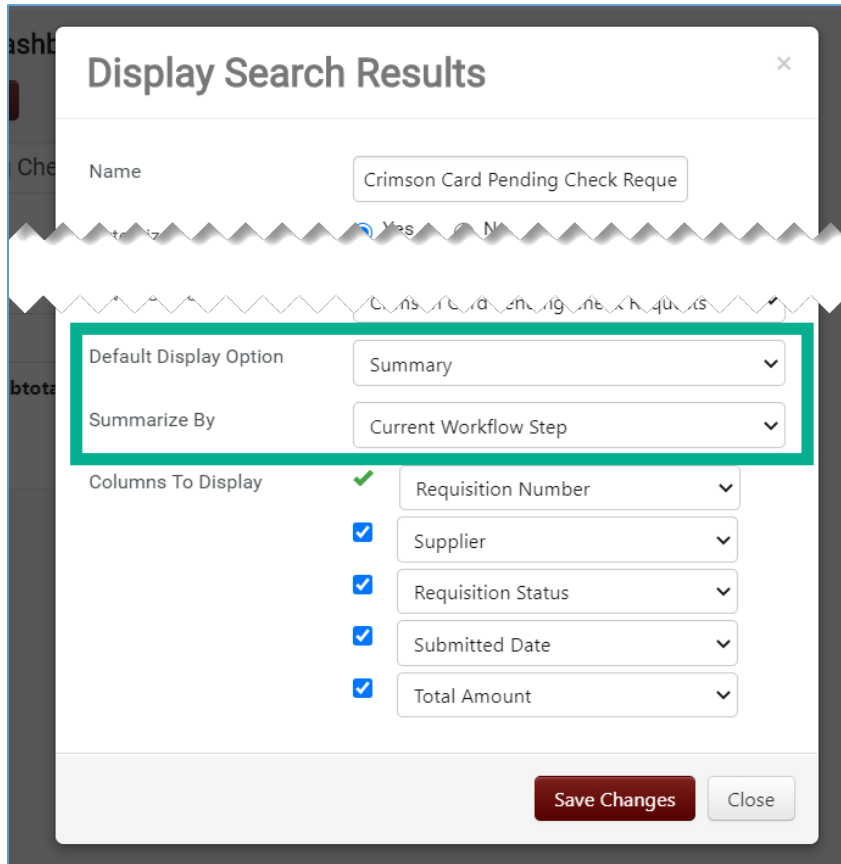
### Auto-size

Selecting **No** next to **Auto-size** allows you to change the width and height of the widget on your dashboard. This is helpful if you have a variety of widgets that you wish to cobble together on the dashboard to save space.



### Default Display Option

There are four options available in the **Default Display Option** field. Information is further grouped by selecting a category from the **Summarize By** drop-down menu.



### Full List

The default widget view. Displays data related to search results using the columns specified when adding the widget.

**Sarah's Crimson Card Dashboard** Dashboard Actions View Another Dashboard

Crimson Card Pending Check Requests Refresh

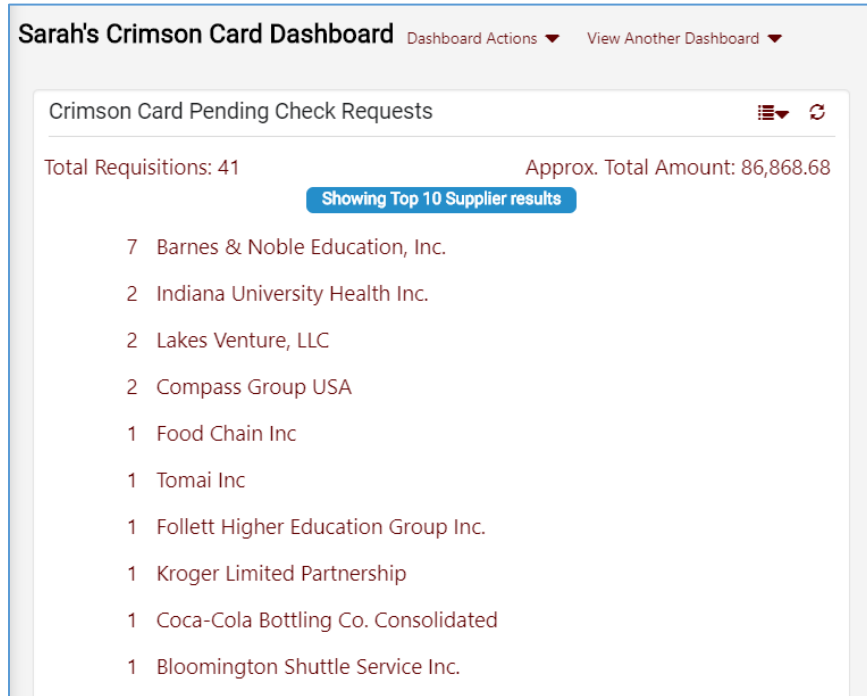
Total Requisitions: 41 Approx. Total Amount: 86,868.68

Requisition Number	Supplier	Requisition Status	Submitted Date	Total Amount
134422450	CC HOLDINGS INC.	Pending	8/4/2020 11:22:24 AM	46.53 USD
134421743	Tomai Inc	Pending	8/4/2020 11:16:01 AM	1,095.38 USD
134421752	AIV All In Ventures	Pending	8/4/2020 11:13:48 AM	107.24 USD
134420978	Condado Tacos 6 LLC	Pending	8/4/2020 11:05:03 AM	34.58 USD
134420803	Barnes & Noble Education, Inc.	Pending	8/4/2020 11:03:31 AM	4,204.47 USD

Page 1 of 9 1-5 of 41 Results 5 Per Page

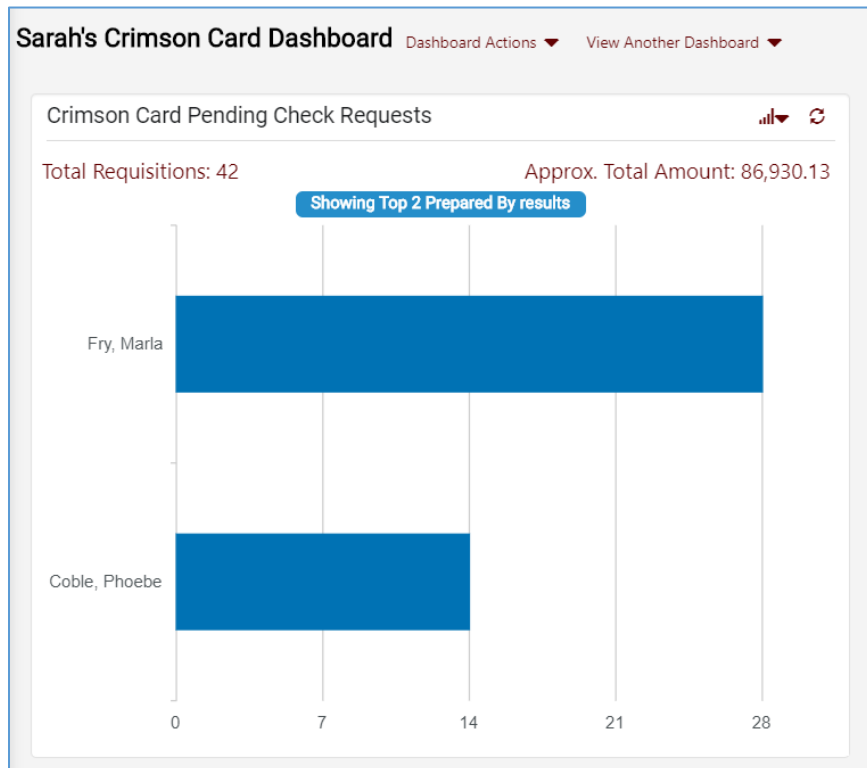
### Summary

Summarizes search results by the category selected in the Summarized By drop-down menu. In the example below, the same search has been summarized by supplier.



### Graph

Displays search results as a bar graph grouped by the category selected in the Summarized By drop-down menu. The example below shows the same search results summarized by the Prepared By field.



### Full Summary

Full Summary is similar to the Summary Default Display Option in that it groups results by the category selected in the Summarize By drop-down menu. Additionally, this option provides a subtotal in dollars for each grouping.

**Sarah's Crimson Card Dashboard** Dashboard Actions View Another Dashboard

Crimson Card Pending Check Requests Chart Refresh

Total Requisitions: 49 Approx. Total Amount: 87,329.65

Showing Top 2 Current Workflow Step results

	Count	Amount
Fo Approval	48	59,214.90
Org Review	1	28,114.75
<b>Subtotal:</b>	49	87,329.65

### Columns to Display

BUY.IU populates select columns for you based on the Search Type you selected, but you may change the columns and number of columns displayed. At least one column must be displayed. You may toggle additional columns off by **unchecking the box** next to the drop-down menus.

We strongly recommend keeping the required default column. This is the document number and allows you to drill down to the document for additional detail from your dashboard. In the example below, this is represented by the Requisition Number

**Display Search Results**

Name: Crimson Card Pending Check Reque

Auto-size:  Yes  No

Default Display Option: Full List

Columns To Display:

- Requisition Number
- Supplier
- Requisition Status
- Submitted Date
- Total Amount

Buttons: Save Changes, Close