

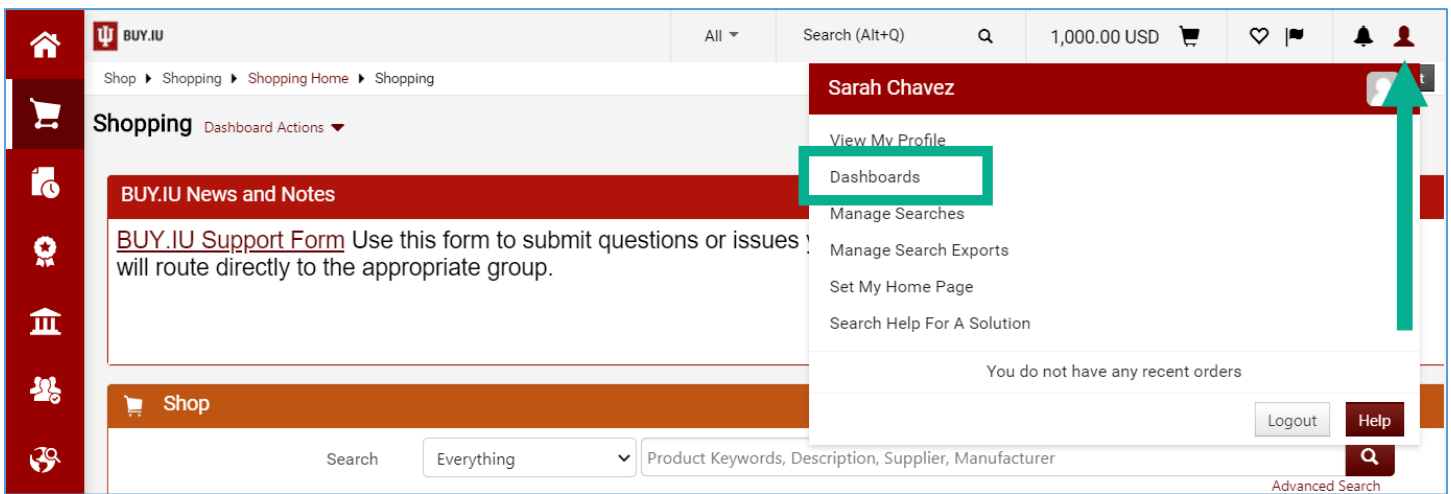
Display Search Results on Your Dashboard

Dashboards in BUY.IU allow you to build a customized interface which updates in real-time each time you access BUY.IU. The dashboards you build are only available to you.

The main advantage of using a dashboard is that it enables you to review multiple search results at a glance. This allows you to quickly access activity involving specific accounts, users, suppliers, or anything else you wish to see. To add a search to your dashboard, you must first build and save that search.

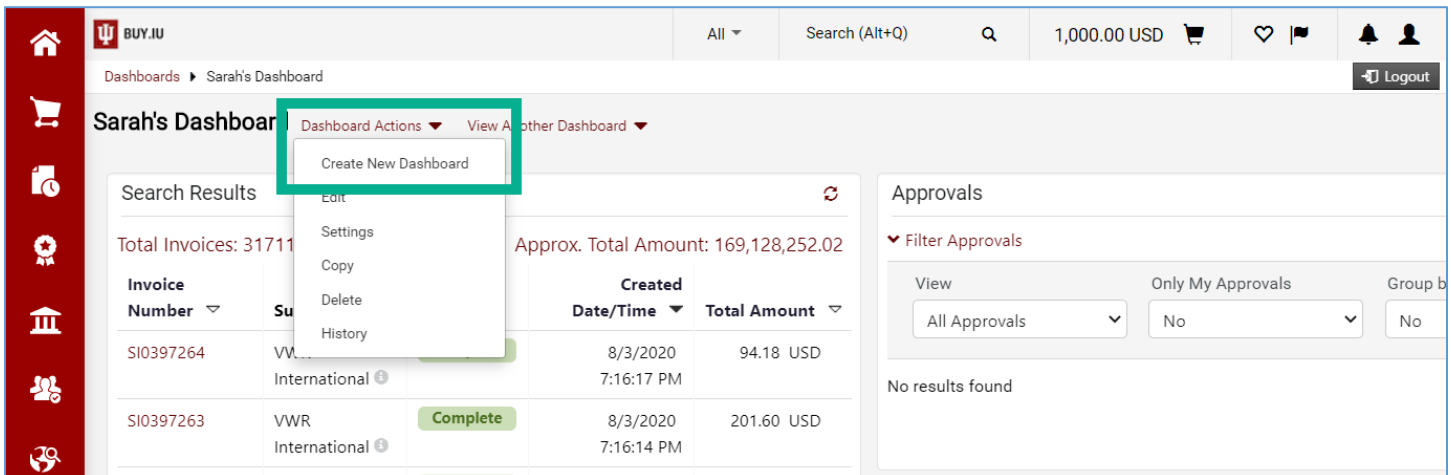
- Review the [Common Search Filters document](#) for guidance on filtering search results.
- Review the [Save and Manage Searches document](#) to learn how to save and share searches.
- Review the [Customize a Widget document](#) to learn how to customize how widgets display information.

First, create a dashboard. Click the **profile icon** in the upper right-hand corner, then select **Dashboards**.



The screenshot shows the BUY.IU user interface. In the top right corner, the user's profile icon is highlighted with a green arrow. A dropdown menu is open, showing the user's name 'Sarah Chavez' and several options: 'View My Profile', 'Dashboards' (highlighted with a green box), 'Manage Searches', 'Manage Search Exports', 'Set My Home Page', and 'Search Help For A Solution'. Below the menu, it says 'You do not have any recent orders' and includes 'Logout' and 'Help' buttons. The background shows the 'Shopping' dashboard with a search bar and various widgets.

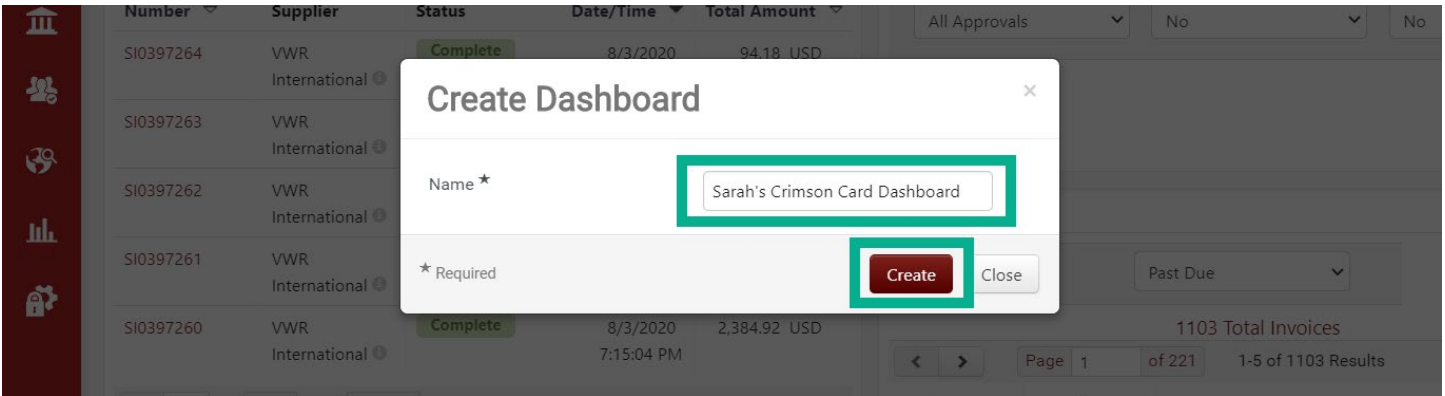
Select **Dashboard Actions**, then **Create New Dashboard**.



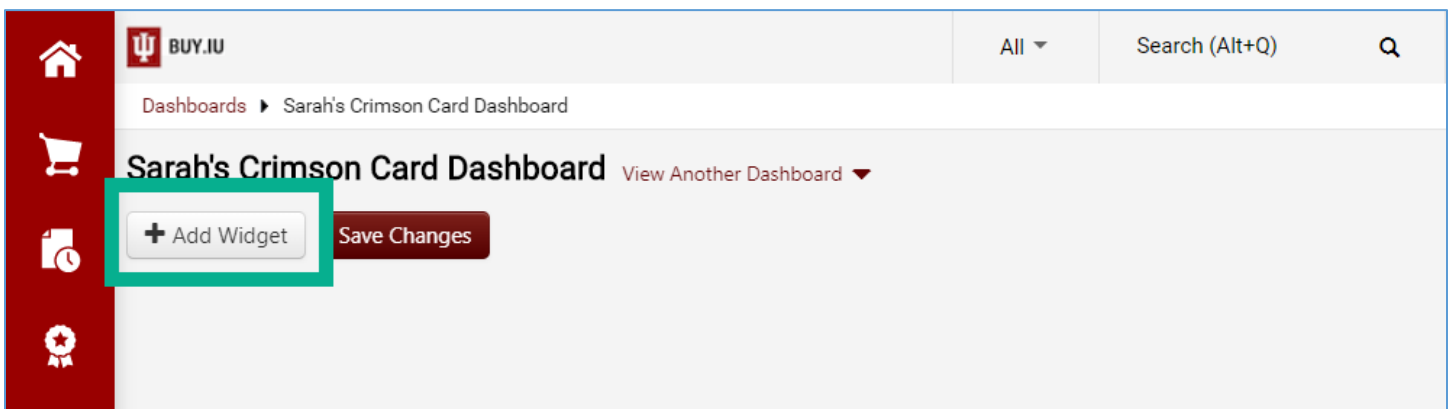
The screenshot shows the 'Sarah's Dashboard' in BUY.IU. The 'Dashboard Actions' dropdown menu is open, and the 'Create New Dashboard' option is highlighted with a green box. The dashboard displays search results for 'Total Invoices: 31711' with an 'Approx. Total Amount: 169,128,252.02'. A table of search results is visible, and the 'Approvals' section shows 'Filter Approvals' with 'View' set to 'All Approvals' and 'Only My Approvals' set to 'No'. The 'No results found' message is displayed below the approvals section.

Invoice Number	Supplier	Created Date/Time	Total Amount
SI0397264	VW... International ⓘ	8/3/2020 7:16:17 PM	94.18 USD
SI0397263	VWR International ⓘ	8/3/2020 7:16:14 PM	201.60 USD

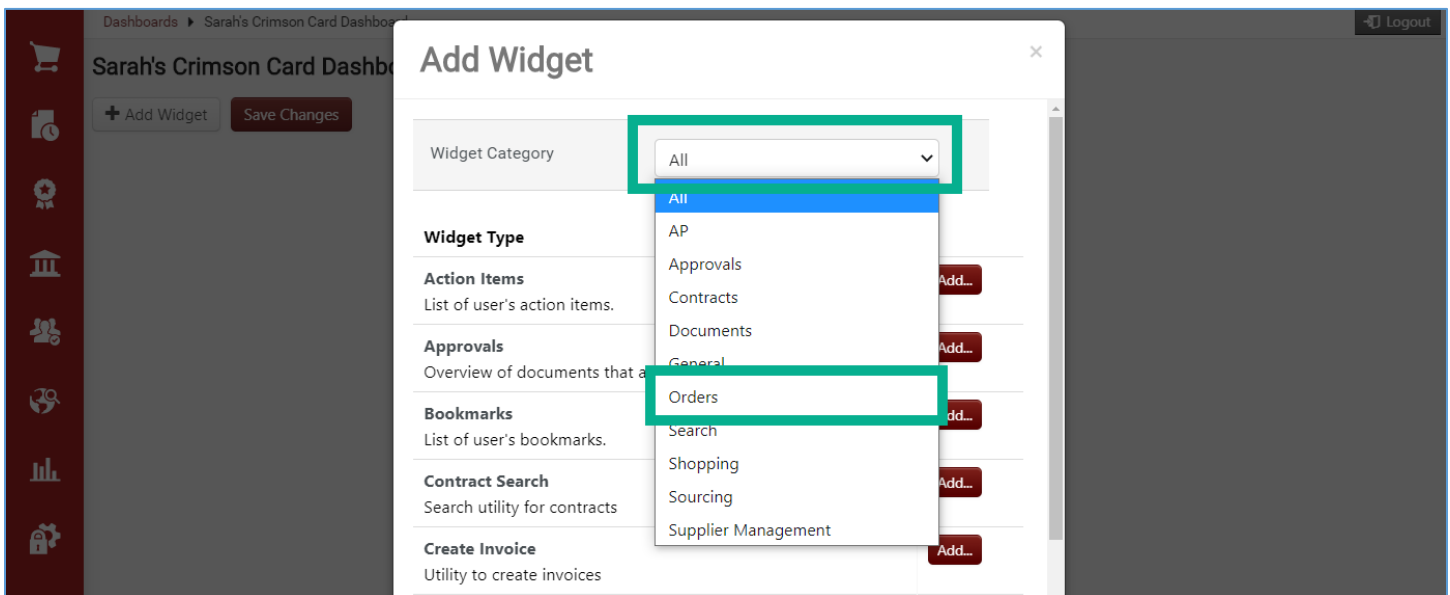
Enter a name for the dashboard in the **Name** field, then click **Save** to create the dashboard.



Click **+Add Widget** to begin building your dashboard.

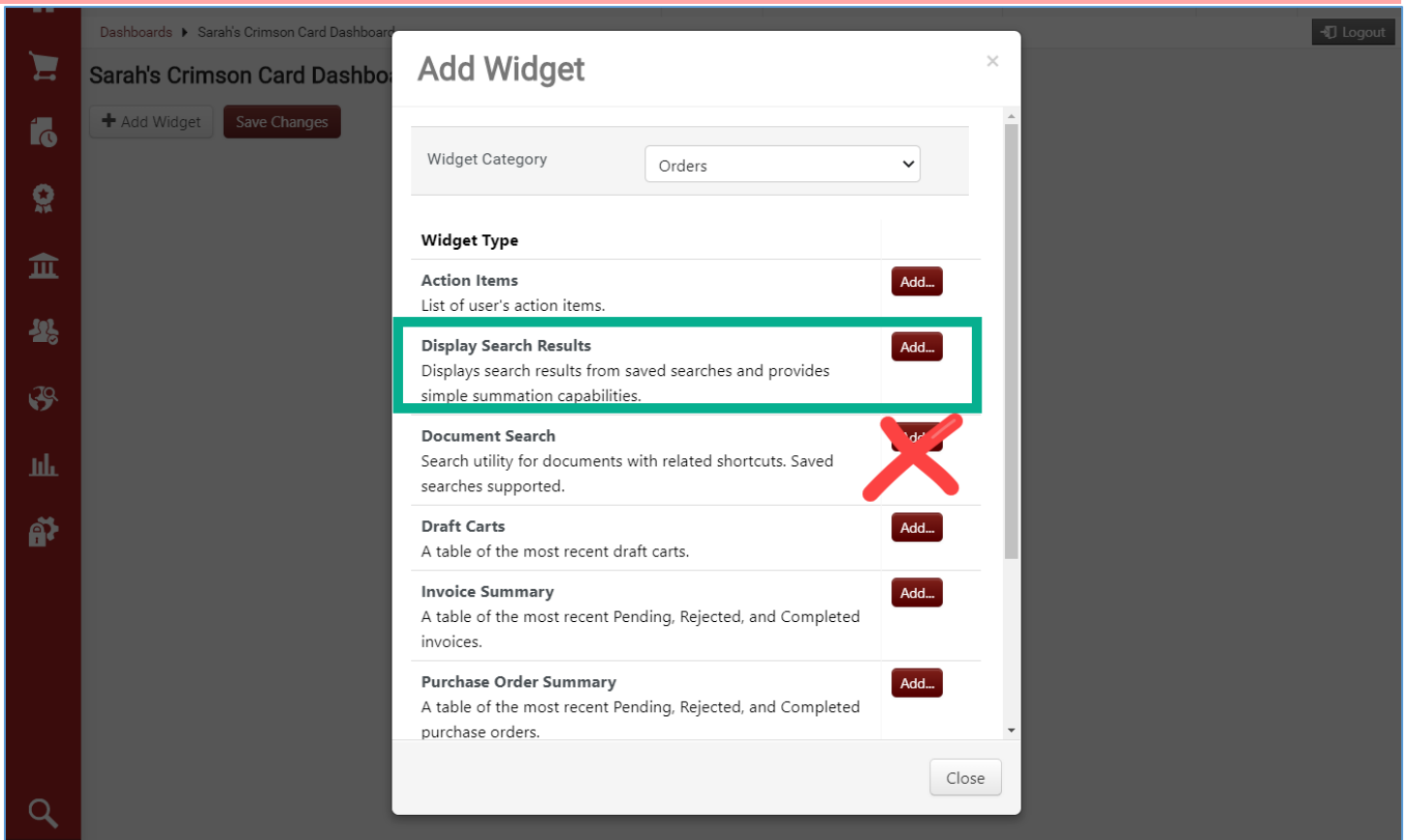


A new window opens. Click the drop-down arrow next to **Widget Category** and select the **Orders** option. This enables you to add items from the Orders module, such as a saved search, to your dashboard.



The page reloads with new options. Click **Add...** next to the Display Search Results option.

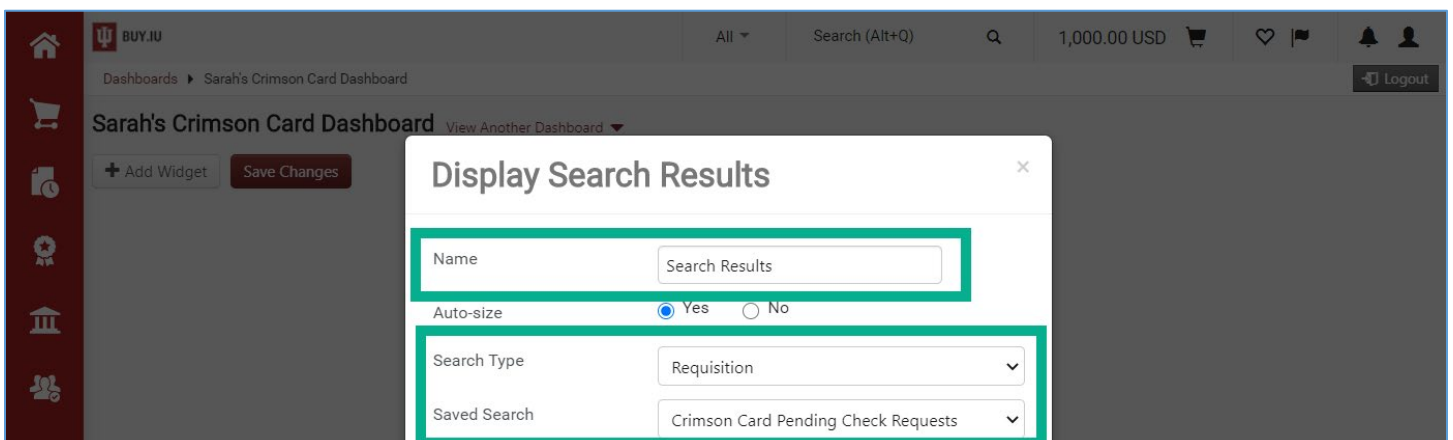
DO NOT use the Document Search option.
This adds a generic document search to your dashboard.



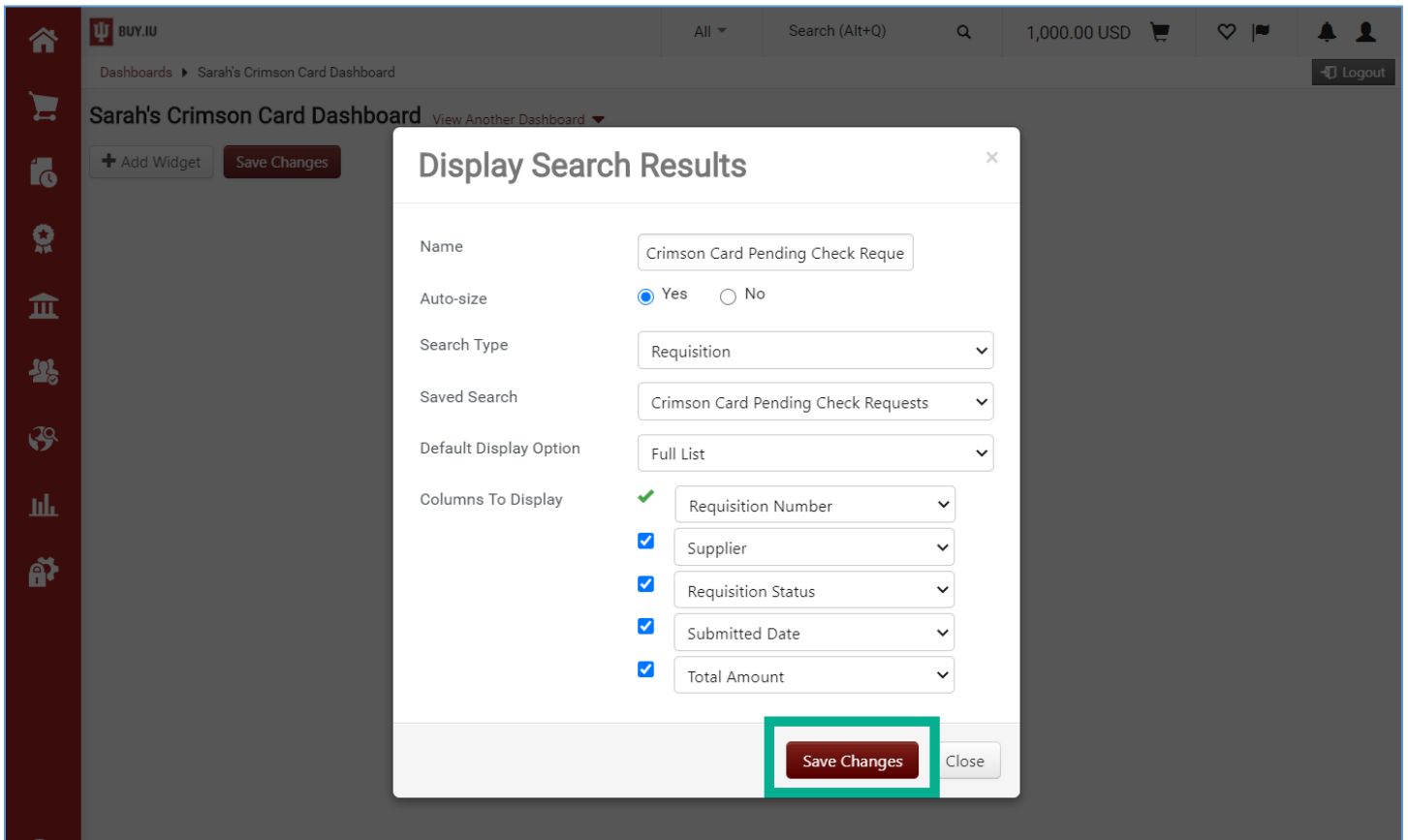
Enter the name of the search you are adding to your dashboard in the **Name** field. This is the name that will appear on the dashboard itself.

Next, select the type of search you wish to add from the **Search Type** drop-down menu. This is the section of the Orders module where you created and saved your search. In this example, we're adding a requisition search, so we'll select Requisition from the drop-down menu.

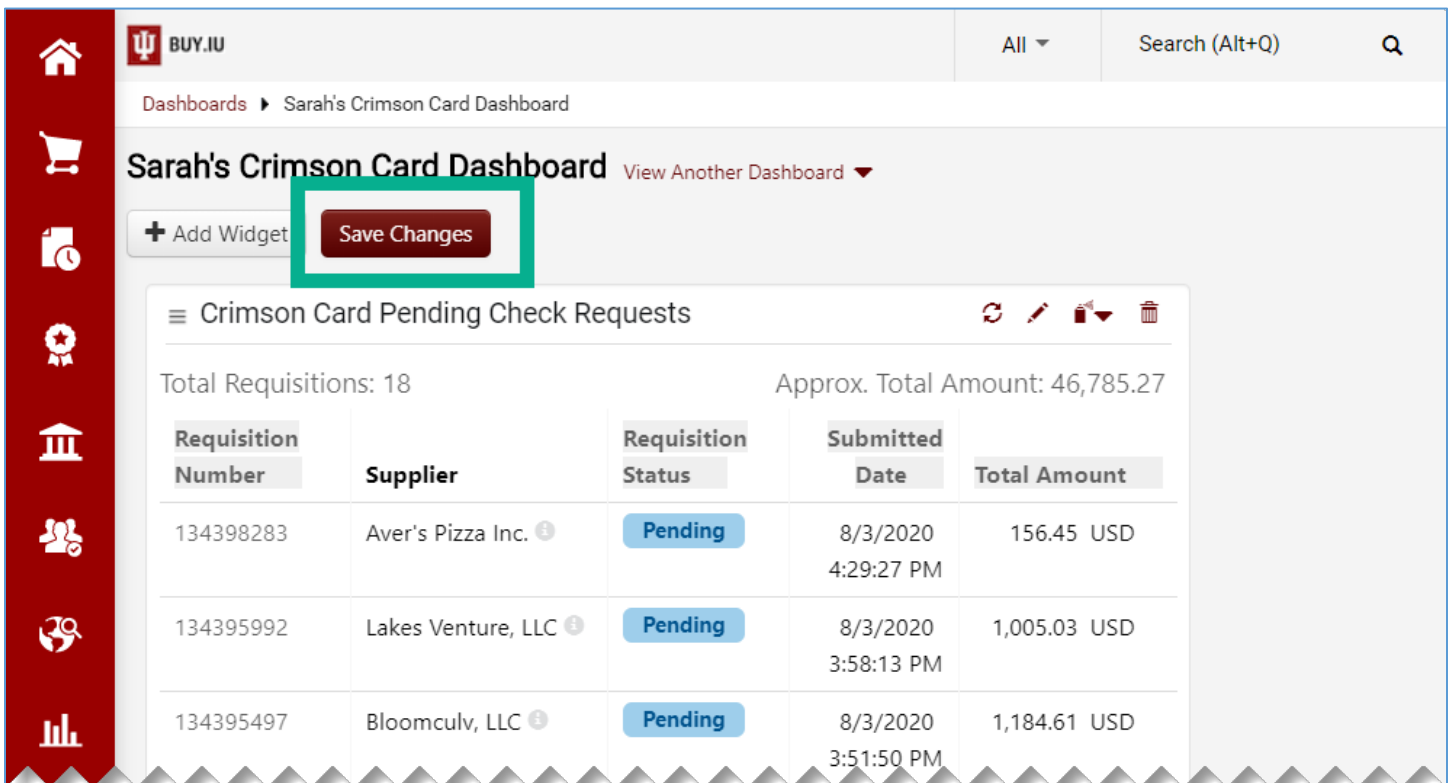
Next, select the saved search from the **Saved Search** drop-down menu. Here, we're adding the Crimson Card Pending Check Requests search.



The remaining fields update with the default display and column options based on the Search Type you selected. Click **Save Changes** to create the widget.



Click **Save Changes** to save your changes to the dashboard.



Once saved, click a **document number** to jump to the document and view full details. You can also click the **Total Documents** or **Total Amount** links at the top of the widget to view the full search results.

Sarah's Crimson Card Dashboard Dashboard Actions View Another Dashboard

Crimson Card Pending Check Requests

Total Requisitions: 18 Approx. Total Amount: 46,785.27

Requisition Number	Supplier	Requisition Status	Submitted Date	Total Amount
134398283	Aver's Pizza Inc.	Pending	8/3/2020 4:29:27 PM	156.45 USD
134395992	Lakes Venture, LLC	Pending	8/3/2020 3:58:13 PM	1,005.03 USD
134395497	Bloomculv, LLC	Pending	8/3/2020 3:51:50 PM	1,184.61 USD
134394901	ST Two Inc.	Pending	8/3/2020 3:45:54 PM	34.48 USD
134394267	Follett Higher Education Group Inc.	Pending	8/3/2020 3:35:53 PM	2,508.67 USD

Page 1 of 4 1-5 of 18 Results 5 Per Page

Repeat the steps in this document to add additional search results to your dashboard.