How to add a component to your dashboard

Open and Edit Dashboard

1. Open your Dashboard- The Icon is located on the top left-hand side looks like a small bar graph
   - Depending on your default setting your dashboard may be different. You can select a different dashboard by clicking the drop-down button next to the title.

2. You will see on the right-hand side of the screen is the More button

3. Once you click on the More button you will see a drop-down menu, select Create Component

4. Slicer Dicer will open- Select Transactions (PB) from the Data Model Screen

5. Click the Load button on the top right-hand side of the screen

6. In the Shared folder select the report you want to add to your Dashboard

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8. Click Create Component on the lower right side

9. In the Create Component box, ensure the Parameters is checked this allows the component to update with the latest information

- Description: Payments received for individual provider. The report reflects the post date of the payment not the date of service the charges were performed.

- Date Range:
  - Last 3 months
  - Start from beginning of first month
  - Include current month
  - Current month to date
  - Since 6/1/2021
  - Fixed: 6/1/2021 to 9/29/2021

- Slice Config: Recalculate top or bottom slices on load

- Parameters: Allow dashboards to change this session's dates

10. Click Add to Dashboard

11. The component will appear in your dashboard usually in the upper left corner