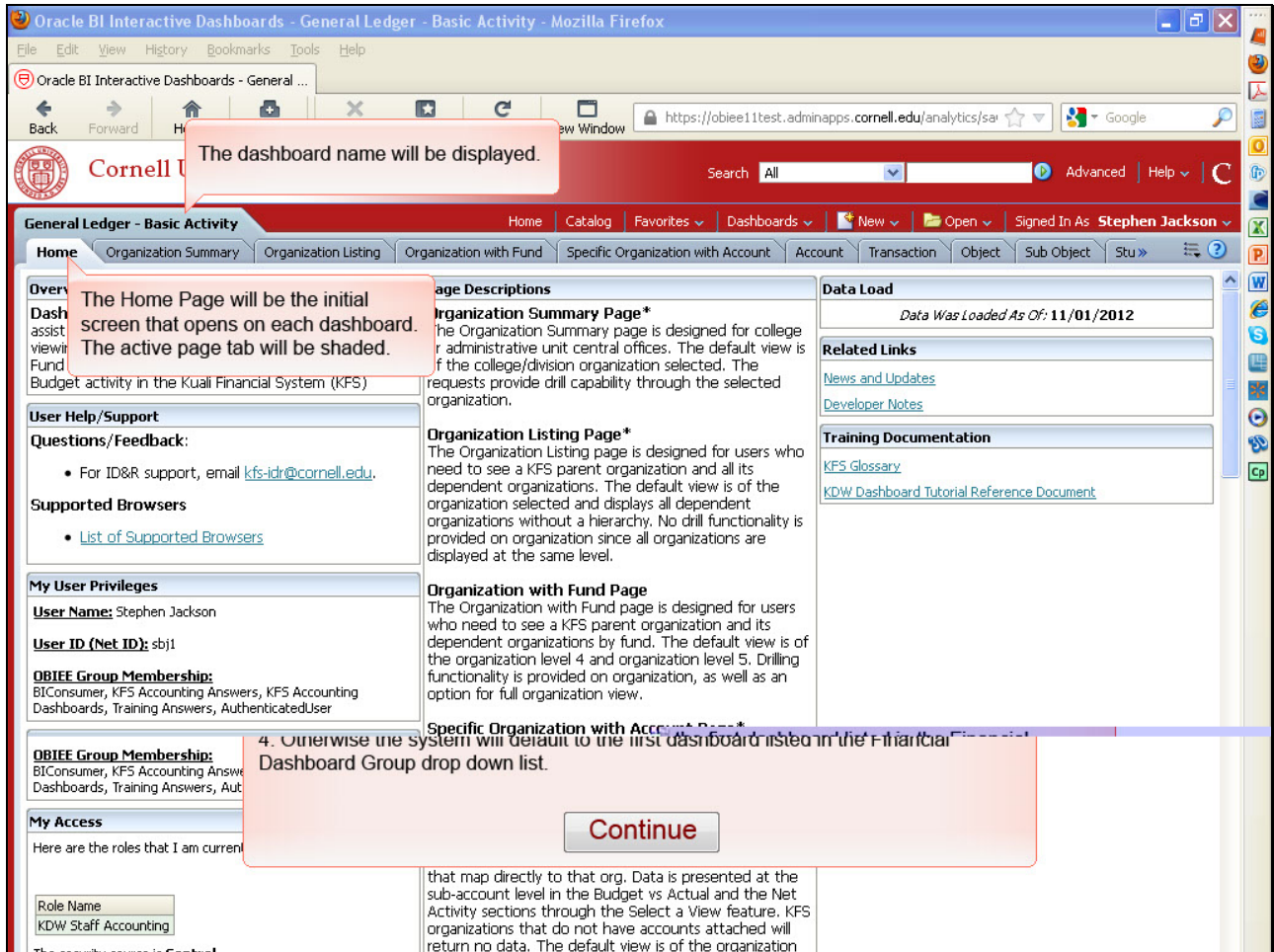### Chapter 1: Getting Started and Basic Navigation

The Home Page will be the initial screen that opens on each dashboard. The active page tab will be shaded.

The dashboard name will be displayed.

NOTE: Where a Dashboard User will land depends on several factors:

1. If the user has designated a "Starting Page", the user will see the specific dashboard.

2. Otherwise, users will go to a dashboard in the alphabetically first **Dashboard Group** (Facilities, Financials, Engineering, etc.) that they have access to.

3. If the only financial role they have is **PIAM** (Principle Investigator/Account Manager) and they do not have access to non-Financial dashboards, the default dashboard will be the **Account-Award Portfolio**.

4. Otherwise the system will default to the first dashboard listed in the Financial Dashboard Group drop down list.
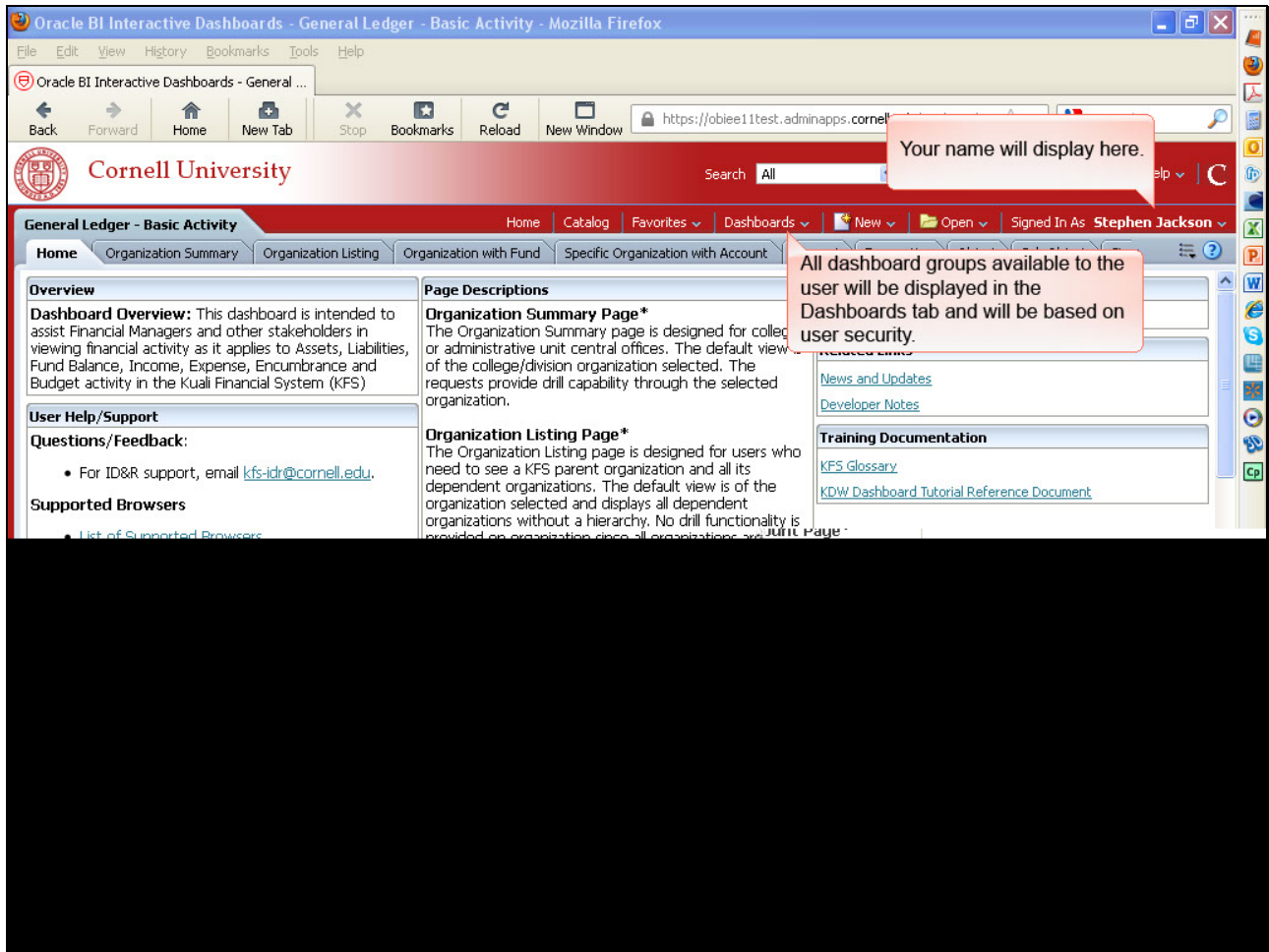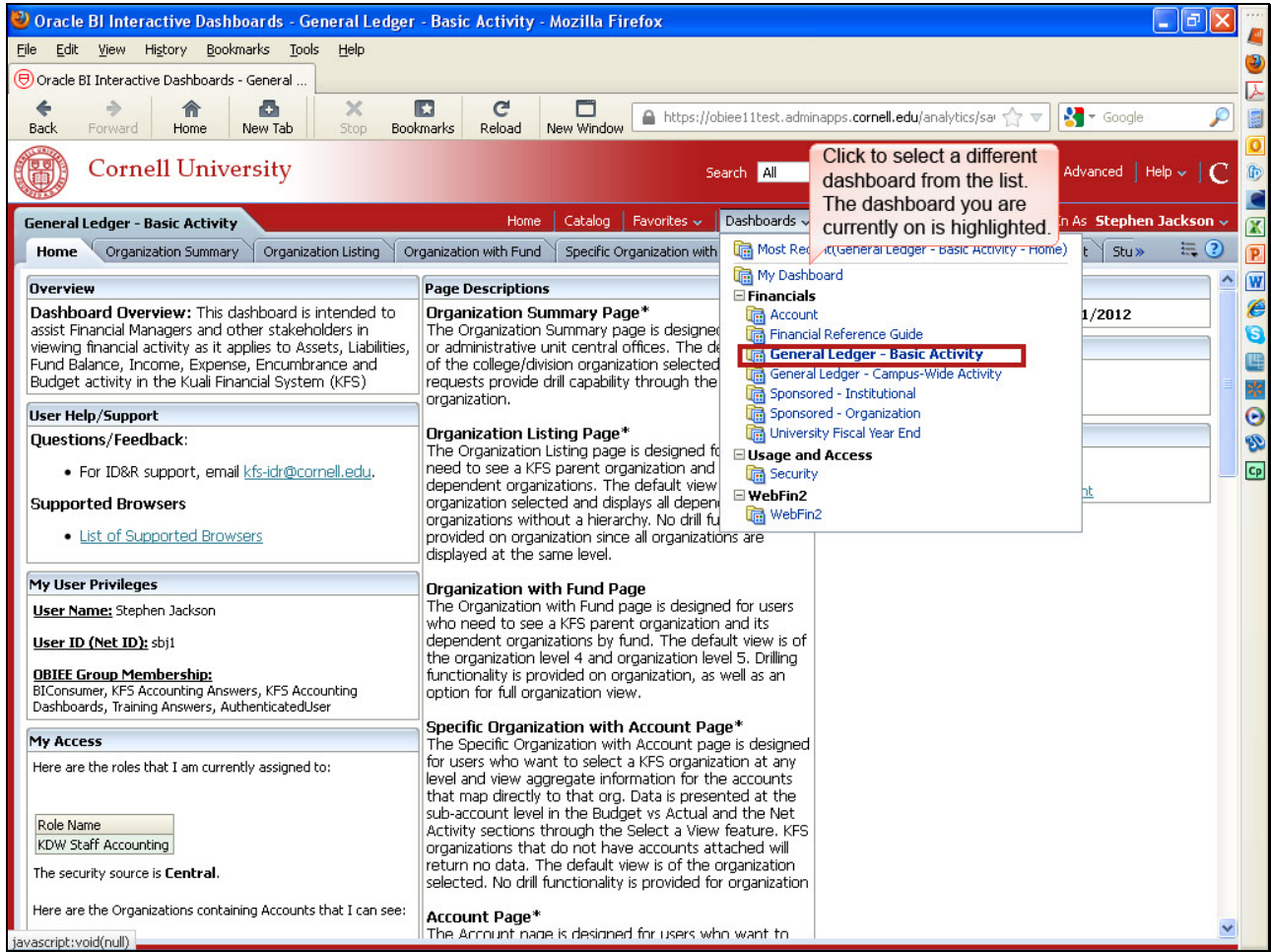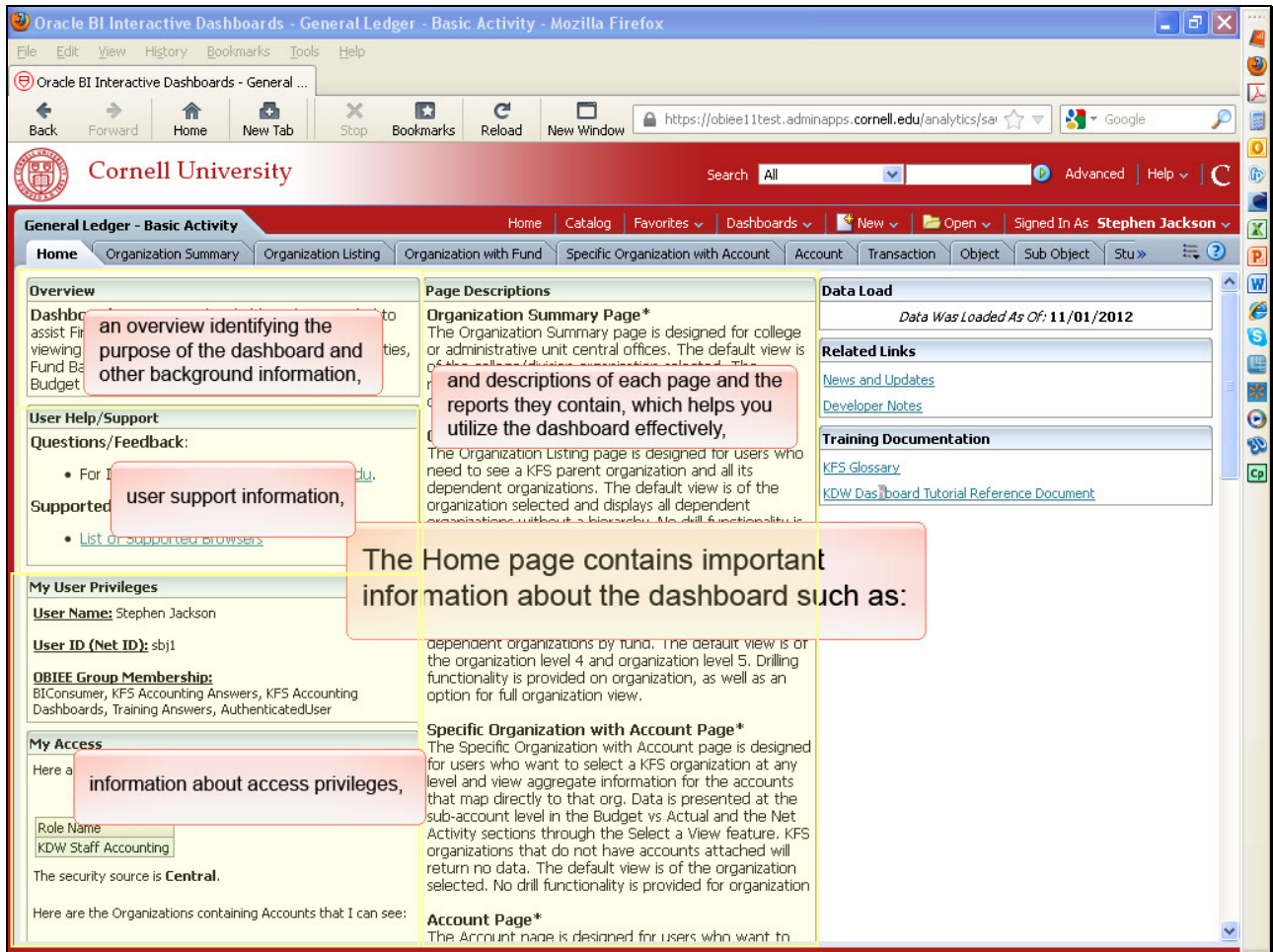
Your name will display here.

All dashboard groups available to the user will be displayed in the Dashboards tab and will be based on user security.

To view the available dashboards, click the down arrow.

Click to select a different dashboard from the list. The dashboard you are currently on is highlighted.

The Home page contains important information about the dashboard such as:

an overview identifying the purpose of the dashboard and other background information;

user support information;

information about access privileges;

and descriptions of each page and the reports they contain, which helps you utilize the dashboard effectively;
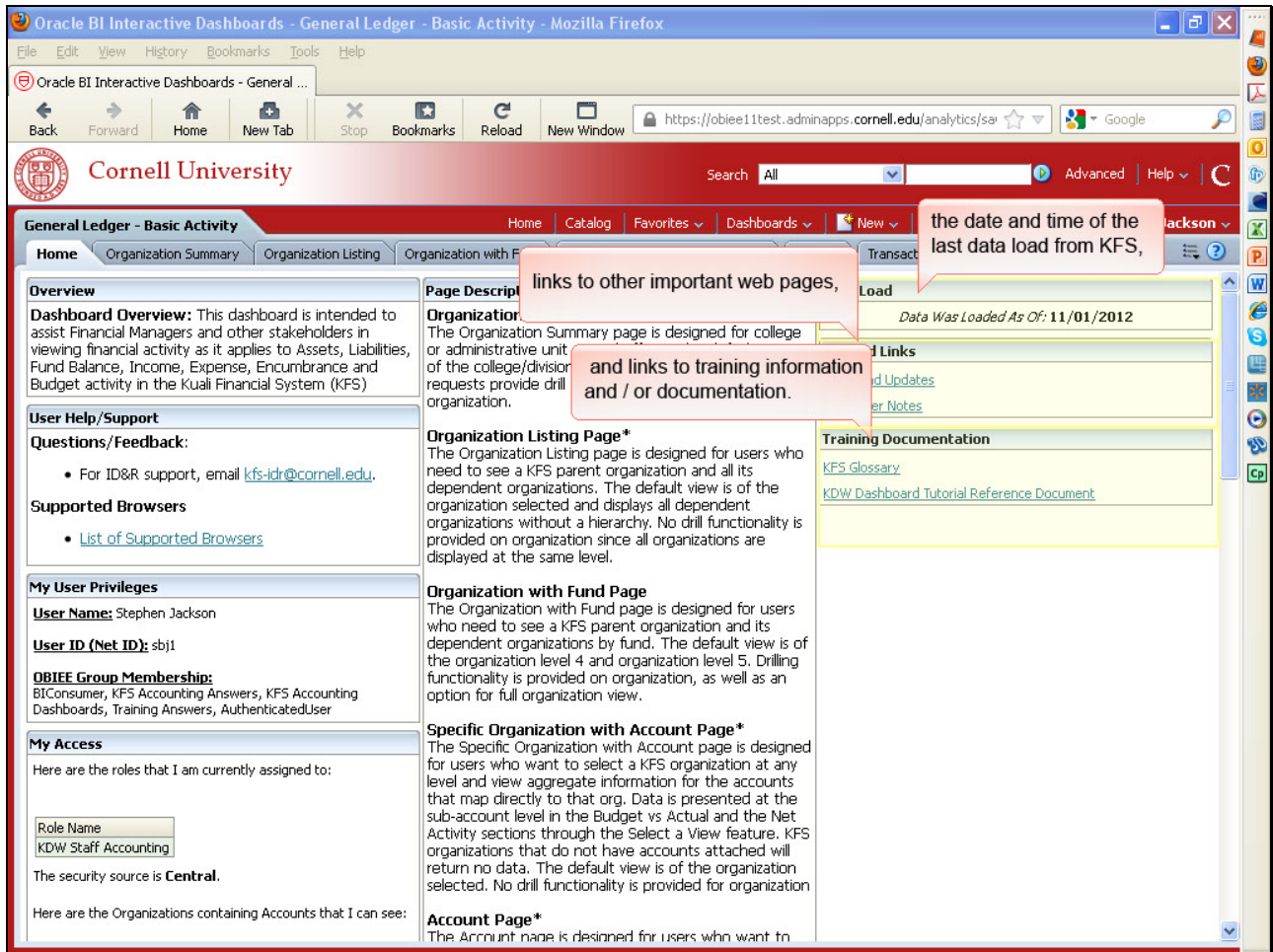
the date and time of the last data load from KFS;

links to other important web pages;

and links to training information and / or documentation.

Tabs show the name of each dashboard page.

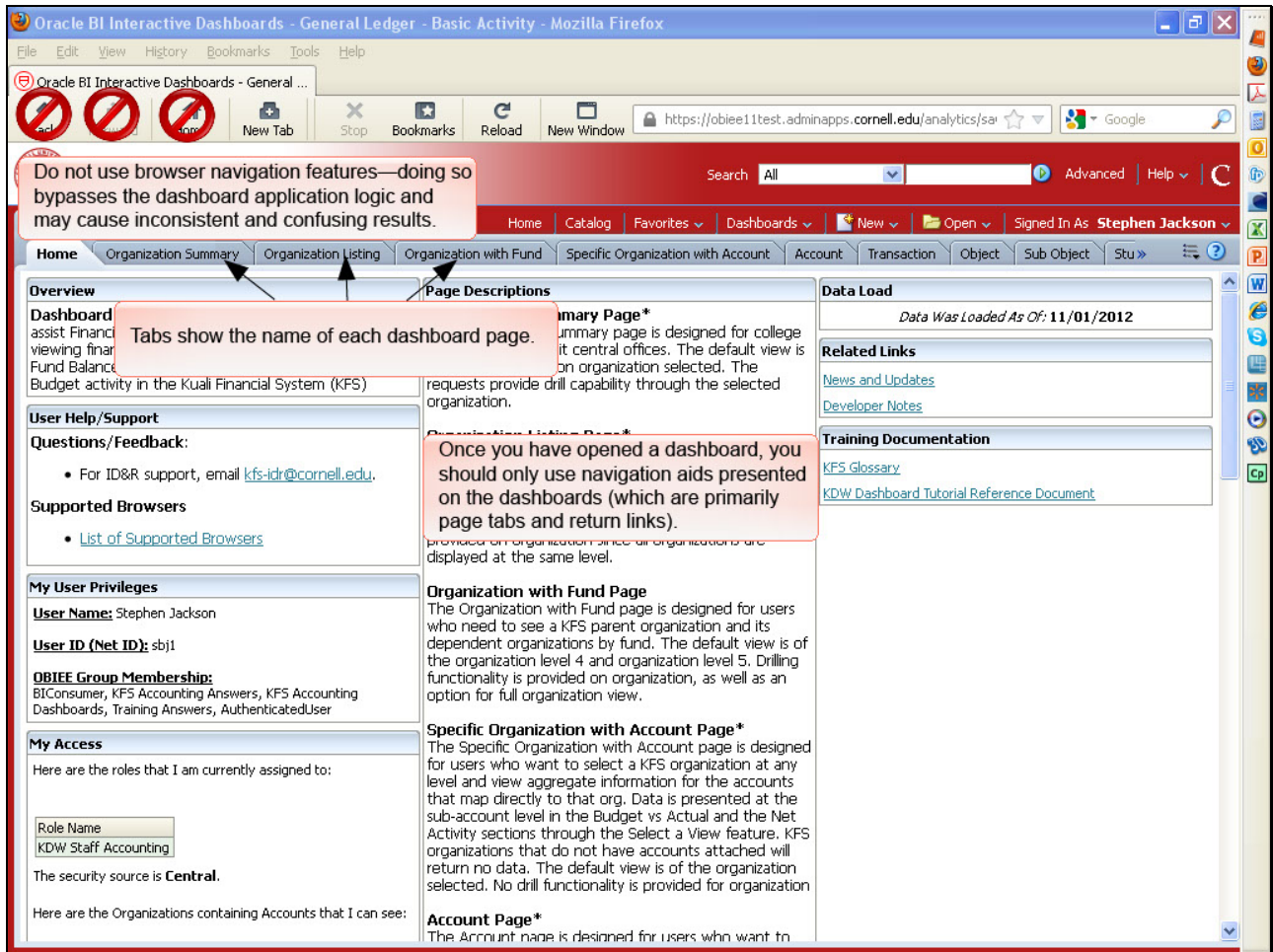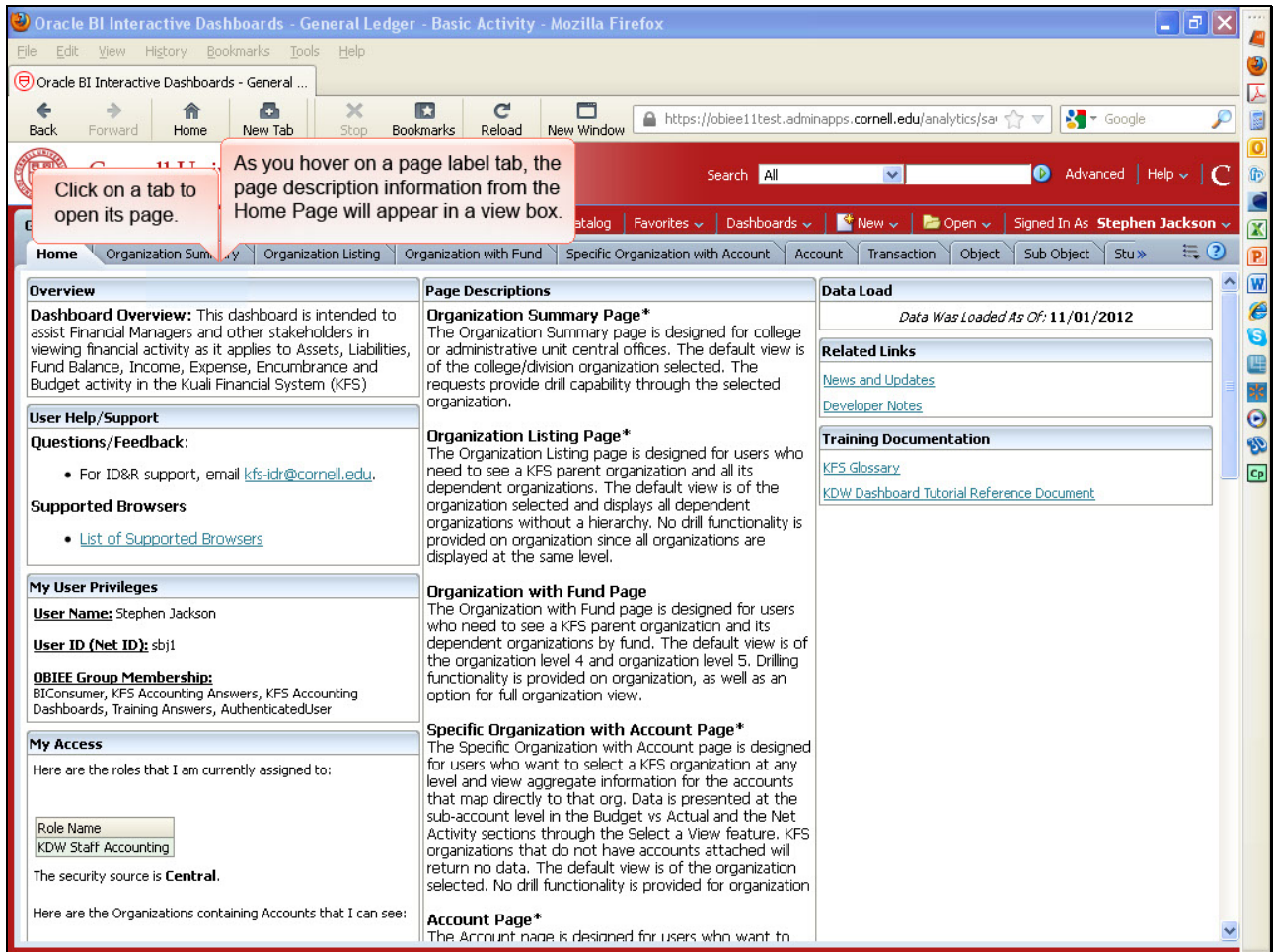Once you have opened a dashboard, you should only use navigation aids presented on the dashboards (which are primarily page tabs and return links).

Do not use browser navigation features'— doing so bypasses the dashboard application logic and may cause inconsistent and confusing results.

Click on a tab to open its page.

As you hover on a page label tab, the page description information from the Home Page will appear in a view box.
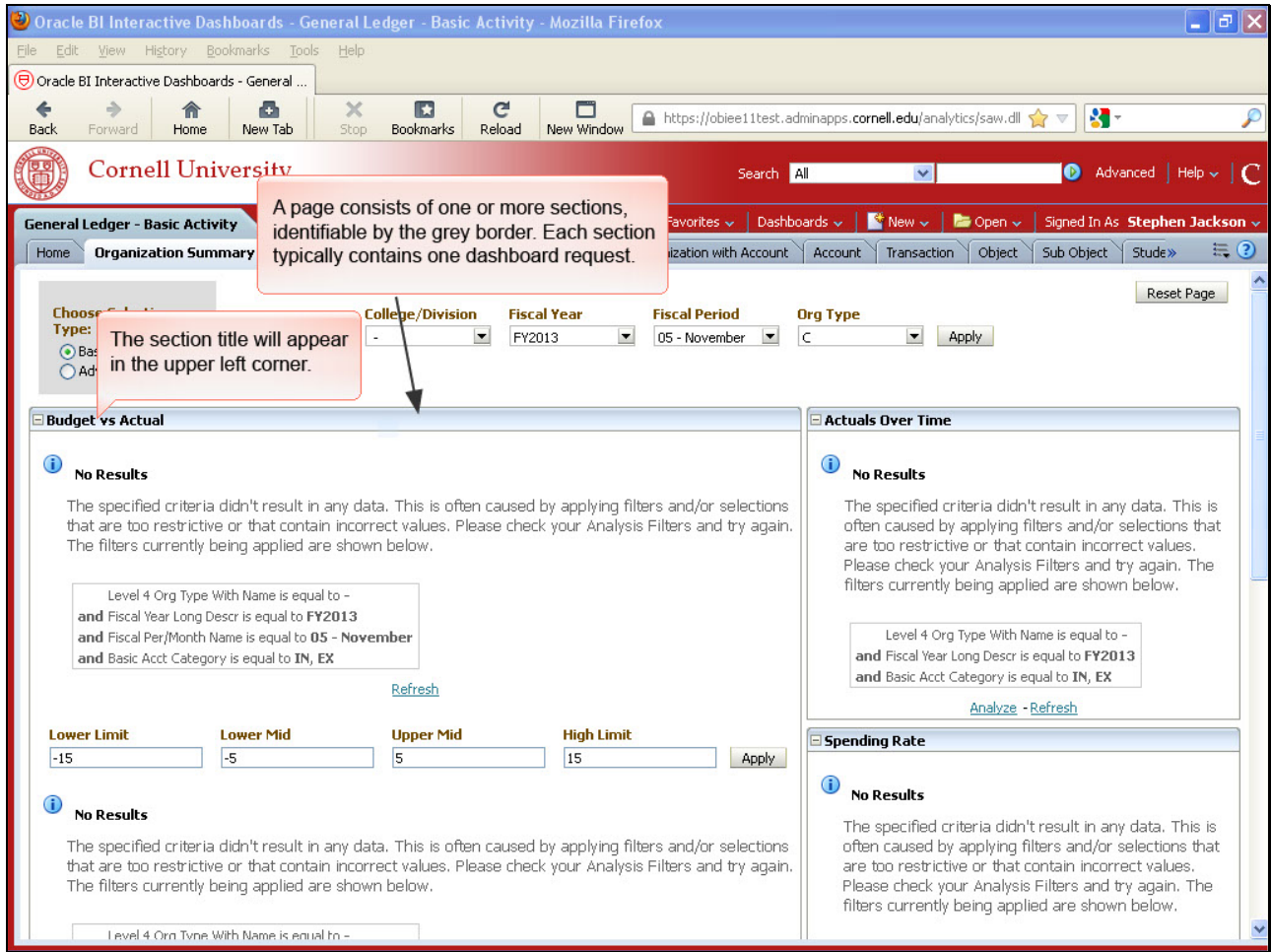
A page consists of one or more sections, identifiable by the grey border. Each section typically contains one dashboard request.

The section title will appear in the upper left corner.