



UMDashboards QuickStart Guide

Logging In

To Log in, follow these steps: <https://dashboards.umd.edu/idashboards/sso>

1. Click this URL:
2. Enter in your UMD Central Authentication (CAS) credentials. You will need to confirm using your DuoMobile or Token.



Protect your account with multi-factor authentication.

[Learn about the upcoming requirement](#) for students that takes effect October 15, 2018.

Directory ID

Password

☐ Don't Remember Login

For security reasons, please log out and exit your Web browser when you finish accessing services that require authentication.

The Division of IT will never ask you to put your password into an email message, but scammers will. Do not share your password with others!

[Forgot your password?](#)
[Forgot your ID?](#)
[Need help?](#)

3. ****Suggested Tip:** add the iDashboards URL as a favorite or bookmark on your preferred browser.**

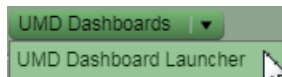
You may be prompted to Enable or Install flash click on the button as seen below and refresh your browser.

Oops.. We detected that your Adobe Flash Player plugin is either not installed or currently disabled for this URL. For the best user experience with this application we recommend enabling your Adobe Flash Player plugin. Click to [Enable or Install](#) the Flash plugin. If the link does not work, it is most likely because your browser settings will not permit the Flash plugin to operate. We also offer a full [HTML5](#) version that will allow you to view the dashboards in the web browser without the use Flash.

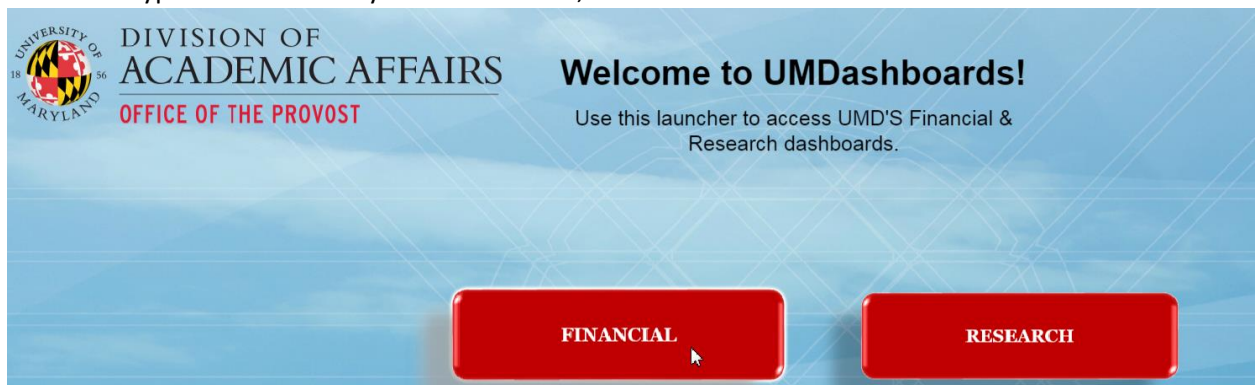
Accessing Dashboards

The dashboards can be accessed by click on a category located at the top of the iDashboards application.

1. Click on the UMD Dashboards category:



2. Select the type of dashboards you'd like to view; i.e. Financial or Research:



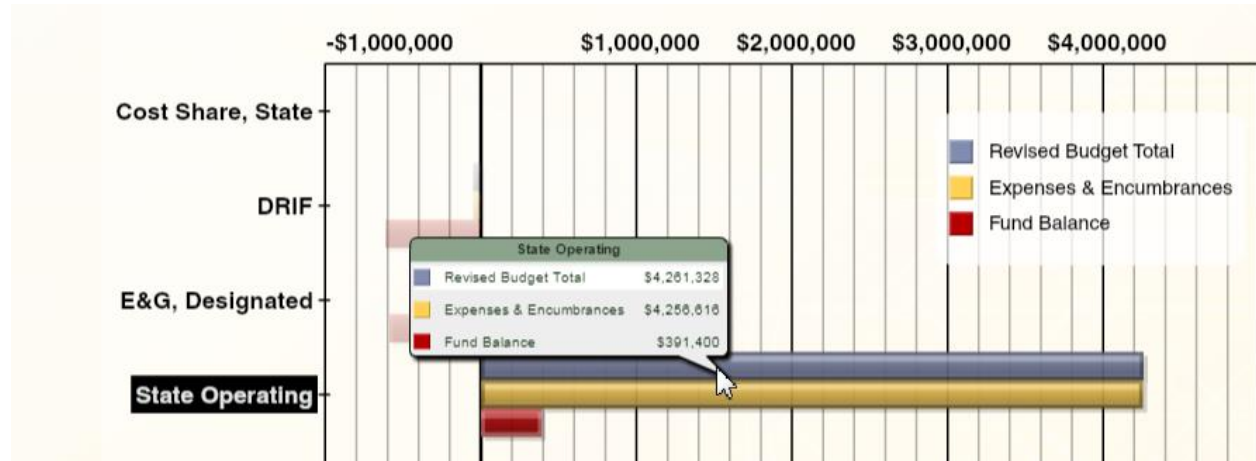


Dashboard Navigation

Some of the dashboards may be equipped with filters.

Highlighted Values:

Move your mouse on the charts and chart segment graphical values (columns, bars, pie slices) to expose underlying data values for chart:



Filters:

1. Similar to the dashboard categories, click on a filter and chose the desired value by either click Select All, choosing one or multiple values.

Department: AGNR-Agricultural & Resource | Sub Department: AGNR-Agricultural & F | Update

il: \$4,230
nc Total: \$860,803
ce: -\$1,67

Department Restrict

Revised Budget
Actual Fiscal Year Exp
Budget Balance A

AGNR-Agricultural & Resource Econ
AGNR-Agricultural Experiment Station
AGNR-Animal & Avian Sciences
AGNR-Communication & Information Te...

2. Click the Update button to refresh the dashboard's data:

Department: AGNR-Agricultural & Resource | Sub Department: AGNR-Agricultural & F | Update

il: \$4,230
nc Total: \$860,803
ce: -\$1,67

Department Restrict

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Pivots & Drilldowns:

Drilldowns:

1. To identify charts with drilldowns simply hover your mouse over the chart. If your mouse arrow  becomes a hand  then the chart you've selected contains drilldown functionality.
2. If you'd like to return to the previous chart after drilling down, click the Drill Back  cursor.

Pivots:

1. Pivots work similar to drilldowns by filtering linked charts. In example below, the below tabular chart has been filtered/pivoted to display the position status (Position Filled vs. Vacant).



Selecting a Start-Up Dashboard:

A user can designate a start-up dashboard which automatically appears upon first logging. Follow these steps to set up a start-up dashboard.

1. Menu → User Settings → Startup Dashboard
Click the Select button to specify your startup dashboard:

The screenshot shows the "User Settings" form. The "Startup Dashboard" section is highlighted with a red circle. It includes a dropdown menu for selecting a dashboard and a "Select" button. Other settings visible include Language (English), Skin (Soft Green), Dashboard List Mode (System Default), Dashboard List Style (System Default), Dashboard List Position (System Default), Dashboard Transition (System Default), Category Sort Order (Server Order), Data Source Caching (minutes) (0), Periodically check for new alerts (checked), Minutes between checks (1-60) (10), Receive alert notifications by email (checked), Receive alert notifications by SMS (unchecked), Email Address (dkenny62@umd.edu), SMS Country Code, SMS Phone Number, SMS Carrier, and Long Message Behavior (System Default). At the bottom, there are buttons for "Change Password", "Save", and "Cancel".



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Select the UMD Dashboards, choose UMD Dashboard Launcher and click OK.

Select a Startup Dashboard [X]

Categories	Dashboards
ENGR: Dev-DK	UMD Budgeted Positions Dashboard
ENGR: EIT	UMD Dashboard Launcher
ENGR: Research	UMD Faculty and Staff Budget
ENGR: Testing	UMD Financial Dashboard Launcher
Fringe Pilot Group	UMD Fund Balance Dashboard
Provost Demo	UMD Funding: Proposals, Awards, Expenditures
UMD Dashboards	UMD Research Launcher
Visibility Pack	

Search for Dashboard...

UMD Dashboard Launcher
The selected dashboard will be automatically loaded when you log into iDashboards.

Use Current Clear **OK** Cancel

2. Click the Save button at the bottom of the User Settings.
3. Refresh your browser or log out and log back in to verify that your newly defined Startup Dashboard has taken effect.