

Customizing the Home Portal

For DGIS Business and Enterprise Customers the Portal Page, or "Home" tab, is a customizable page where Administrators can add documents, links, or notes containing important information.

Video url, <https://youtu.be/AXIBZQ0RtDw>



The screenshot shows the DGIS Home Portal. At the top, there is a navigation bar with links for Home, Parts, Shipping Papers, Regulations, Administration, Training, and Help. The Home link is highlighted. On the right side of the top bar, there are 'Welcome, Corey Abram' and 'Log Out' buttons. Below the navigation bar, there is a search bar with the placeholder 'Part or UN ID' and a 'Search' button. To the right of the search bar, there is a 'Actions' button and a 'Add Group' button. A 'Document Management' group is visible, containing a search bar with the placeholder 'Part or UN ID' and a 'Search' button. The 'Add Group' button is highlighted with a red box.

here are several tools that allow you to edit your Portal Page. Each section is called a Group and each Group can have individual Items. The Icons available for Groups are:

- Document
- Note
- Link
- Request
- Folder
- Star
- Book
- Shipment

Within each Group, you can add Items. Each Item can be a document, a link, or a note.

Adding a Group

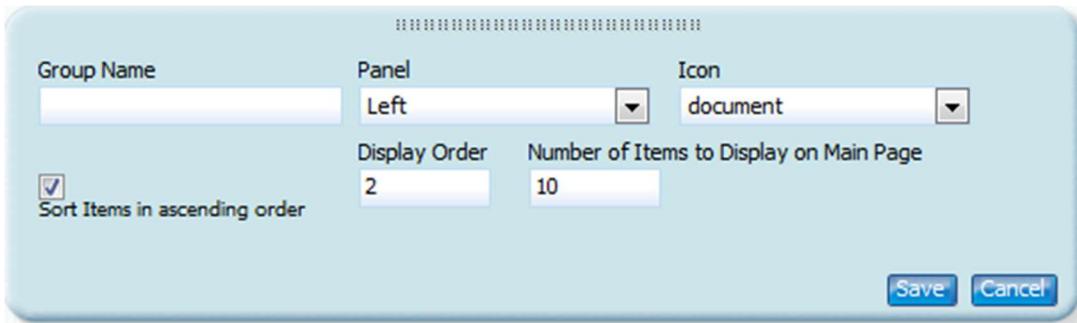
To add a Group click on Add Group in the top right hand corner.



The screenshot shows the DGIS Home Portal. At the top, there is a search bar with the placeholder 'Part or UN ID' and a 'Search' button. To the right of the search bar, there is a 'Actions' button and a 'Add Group' button, which is highlighted with a red box.

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It will bring up the following screen:



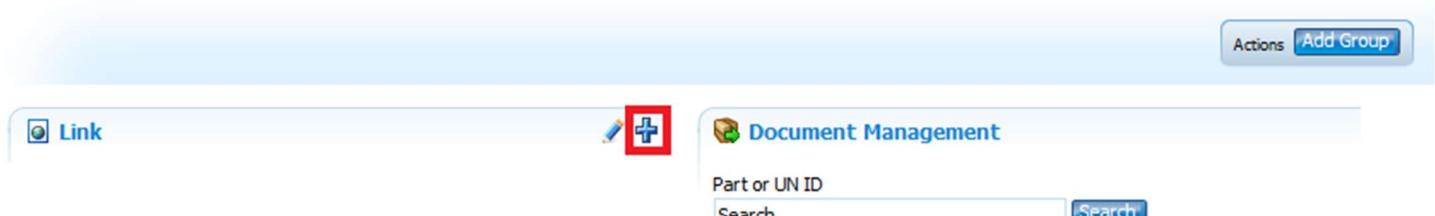
The dialog box has the following fields:

Group Name	Panel	Icon
<input type="text"/>	Left	document
Display Order	Number of Items to Display on Main Page	
<input checked="" type="checkbox"/> Sort Items in ascending order	2	10
Save Cancel		

You can give the Group a name, select what icon it will display, and set its location. The Group name will display as the header for that particular Group. The Icon shows what type of Group it is. To dictate whether it is on the left hand side or the right hand side select Left or Right under Panel. To determine what order it will display in, give it a number under Display Order. You can also set how many items can be displayed on the main page by entering a number under Number of Items to Display on Main Page. Click on Save to save this Group.

Adding an Item

To add an Item to a Group, click on the blue plus sign next to the Group you want to add the Item to.

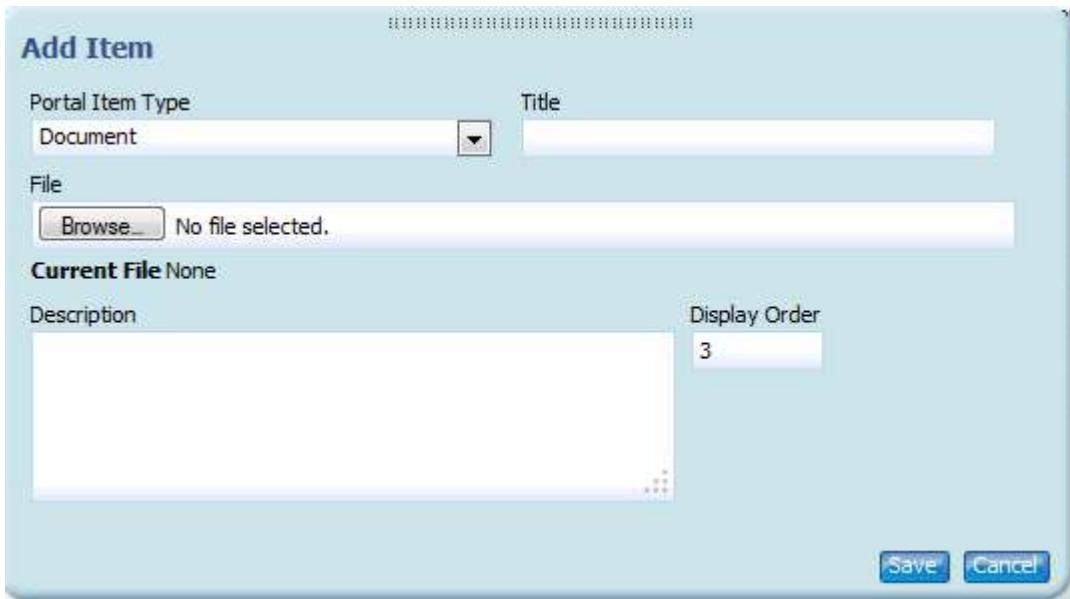


The dialog box has the following fields:

<input checked="" type="checkbox"/> Link		Document Management	Actions Add Group
Part or UN ID		<input type="text"/> Search	Search

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That will bring up the following screen:



Add Item

Portal Item Type: Document

Title:

File: No file selected.

Current File: None

Description:

Display Order: 3

Save Cancel

From here you can select what type of Item it is (link, document, or note) under Portal Item Type. The Item Type you select will change the options below it. You can give all Items a title, a description, and a display order (what order it is displayed in compared to the other Items in this Group). For a Link you can also give it a URL (web address) and for a Document you can also click on Browse to select a file to upload. Click Save to save this Item or Cancel to start over.

Editing a Group or an Item

To edit a Group or an Item, click on the pencil icon next to the appropriate Group or Item.



Actions Add Group

Link

Document Management

Part or UN ID: Search

This will allow you to make changes to the Group or Item as well as delete it. Once you have made any changes, be sure to click on Save. Click on Delete to delete the Group or Item.