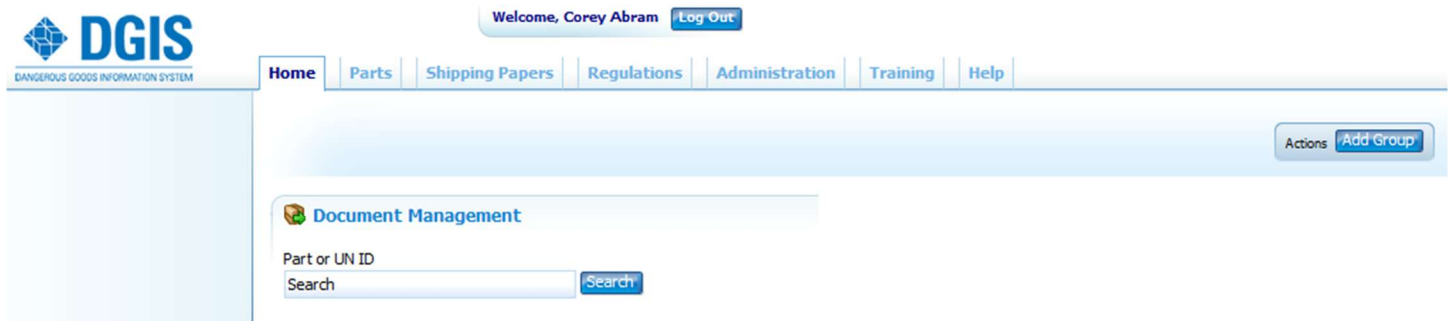


Customizing the Home Portal

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>



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.

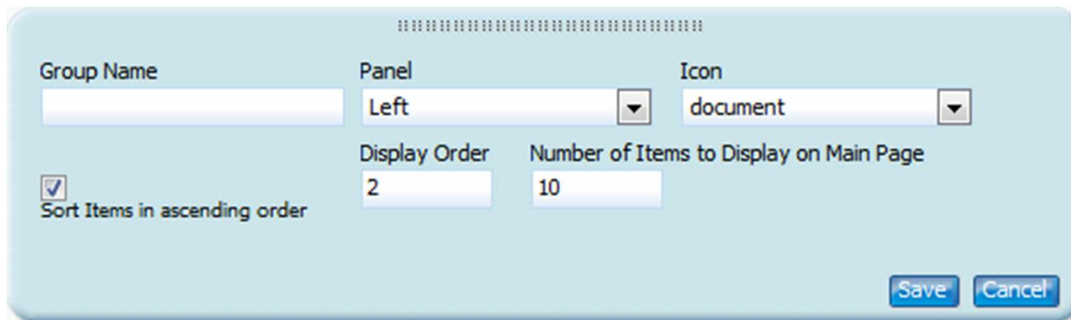
Adding a Group

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



Customizing the Home Portal

It will bring up the following screen:

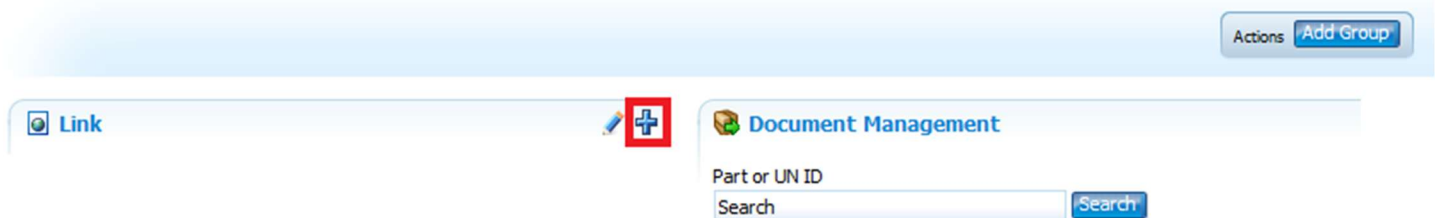


A light blue dialog box with a title bar. Inside, there are several input fields and buttons. At the top, there's a row of small, faint icons. Below that, the 'Group Name' field is empty. To its right, the 'Panel' dropdown is set to 'Left' and the 'Icon' dropdown is set to 'document'. Below 'Group Name' is a checkbox labeled 'Sort Items in ascending order' which is checked. To the right of the checkbox are two input fields: 'Display Order' with the value '2' and 'Number of Items to Display on Main Page' with the value '10'. At the bottom right are 'Save' and 'Cancel' buttons.

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

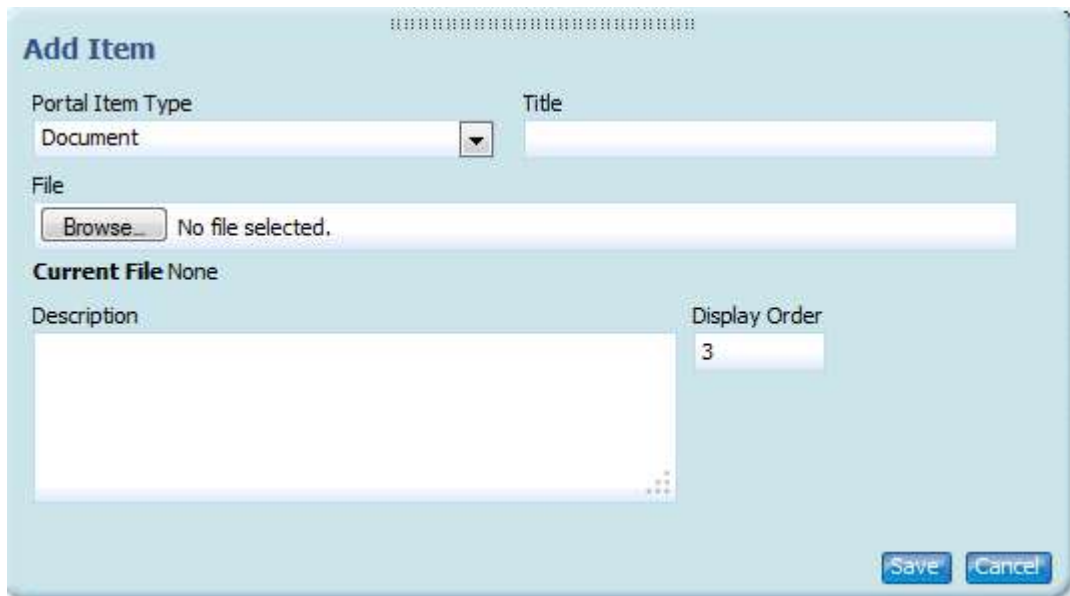
To add an Item to a Group, click on the blue plus sign next to the Group you want to add the Item to.



The screenshot shows a portion of a web interface. At the top right, there's a light blue bar with an 'Actions' label and an 'Add Group' button. Below this, there's a header area with a 'Link' icon and text on the left, and a 'Document Management' icon and text on the right. Between them is a red square button with a white plus sign. Below the 'Document Management' header, there's a search section with the text 'Part or UN ID' above a search input field, and a 'Search' button to the right of the field.

Customizing the Home Portal

That will bring up the following screen:



The 'Add Item' dialog box is shown. It has a title bar 'Add Item'. Inside, there's a 'Portal Item Type' dropdown menu set to 'Document'. To its right is a 'Title' text field. Below the dropdown is a 'File' section with a 'Browse...' button and the text 'No file selected.'. Below that is a 'Current File' label with the value 'None'. To the left of the 'Display Order' field is a large 'Description' text area. The 'Display Order' field contains the number '3'. At the bottom right are 'Save' and 'Cancel' buttons.

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.



The interface shows a header bar with 'Actions' and 'Add Group' buttons. Below is a list of items. The first item is 'Link' with a pencil icon next to it. The second item is 'Document Management' with a search bar below it containing 'Part or UN ID' and a 'Search' button.

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.