QUICK GUIDE

LANDING PAGE SETUP

CUSTOMIZE USER LANDING PAGE VIEWS

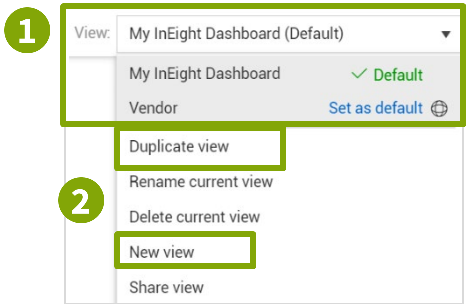
The Custom view only displays in a user profile and cannot be assigned to a role.

1. To set or change a **Default view**, click the **View list** and hover over to select a view, and then click **Set as default** and click **Save**.

2. Select the **View List** ▼ and choose either of these options:

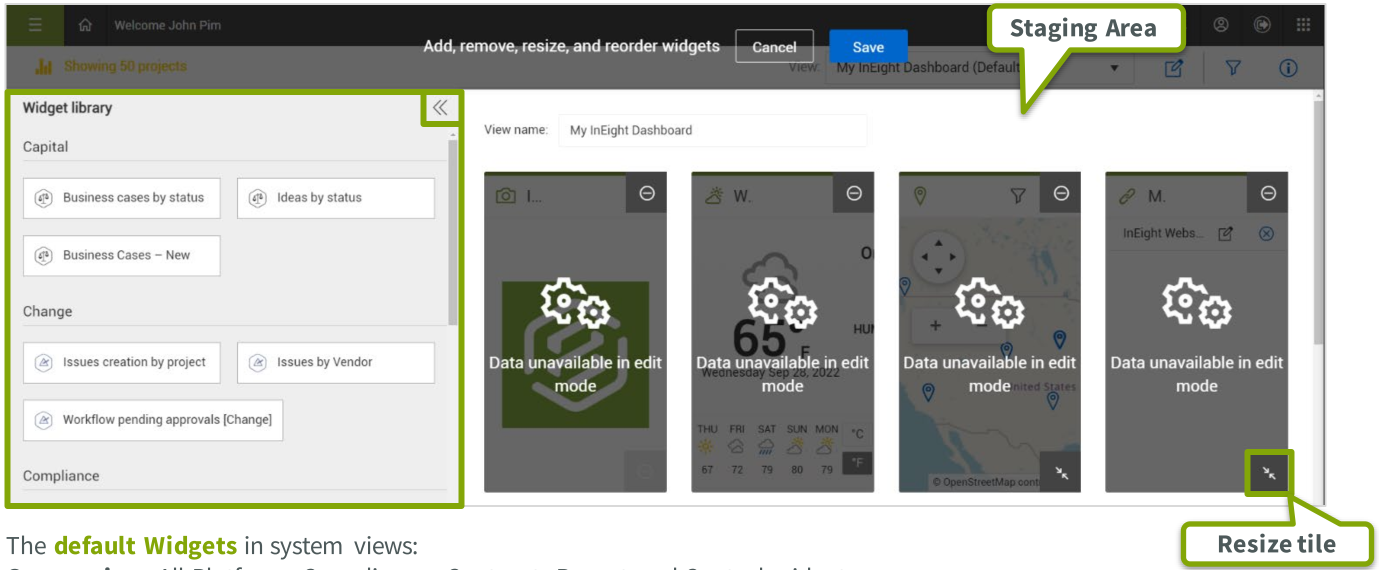
A **Duplicate view** is created from an existing view with content and widgets that can be modified and created,

Or a **New view** starts as a blank page that allows you to add and configure a **widgets** and view the layout.



CUSTOMIZE TILES AND WIDGETS

Select the **arrows** « » to open or close the **Widget library**. Click and drag a widget in the **staging area** to **add, remove**, **arrange, rename view**, and **resize tiles**. Multiple instances of the same widget are allowed to the view.



The **default Widgets** in system views:
Owner view: All Platform, Compliance, Contract, Report and Control widgets.
Vendor view: All Platform, Compliance, and Report widgets.
Contractor view: All Platform, Compliance, Report, Control, and Contract widgets.
Sub-Contractor view: All Platform, Compliance, and Report widgets.

FILTER TILES

If the tile shows data for multiple projects, the **Filter icon** allows you to filter and show only a specific project or list by selecting the checkbox ☑.

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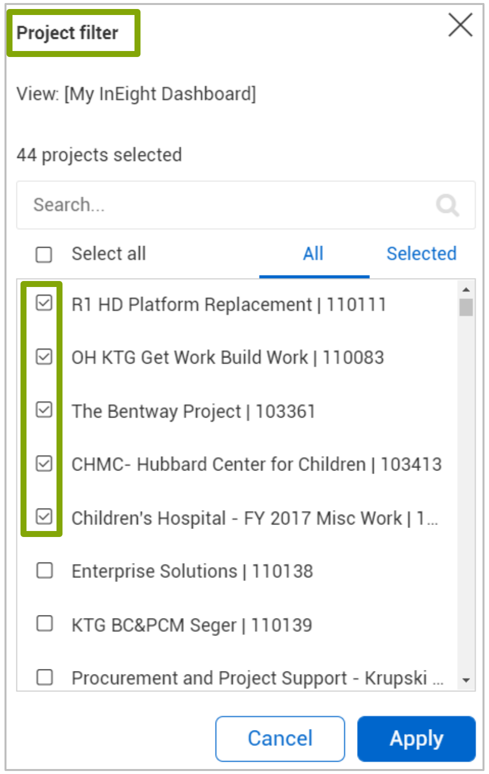
FILTER PROJECTS VIEW

1. Select the **Filter projects icon** in the top main toolbar to view a subset (50 maximum projects).

2. Select the **checkbox** on projects to show as a set of tiles with project data. Click **Apply** to save changes.



ASSIGN VIEWS TO A ROLE

1. Go to **Suite Administration > Roles and Permissions.**

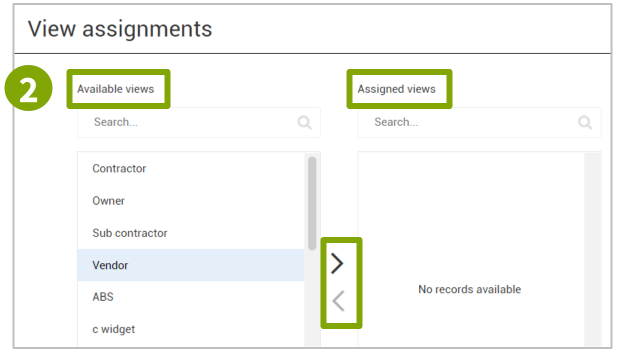
2. Select either **Add role** or **Edit role** and this opens the **Role Details page**.

3. This requires the permissions **View roles**, **Add roles**, or **Edit roles and permissions** (respectively).

4. Scroll down to **View assignments** section.

5. Select from the list of **Available views** and use the arrows < > to **add/remove Assigned views**.

6. Every user assigned to that role will have access to the system views associated with that role.



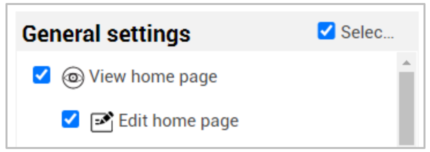
SET UP GLOBAL DEFAULT VIEW

To manage permissions for the **Global Default View,** a **Root Org level** role permission is required.

1. Go to **Suite Administration > Roles and Permissions page.** Select a **role** in the list to edit by selecting the **Edit icon** or select the **Add icon** if adding a new role.

2. Scroll down to Permissions and click to expand the **Organization and project** dropdown menu.

3. In the **General Settings,** check the box to activate both the **View** and **Edit home page**.



4. At the account level go to **Organization > Settings > Global Options > Landing page default view** and select a global default view.