Dashboards
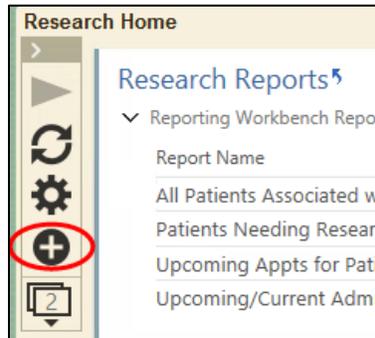
Viewing Available Dashboards

1. After logging in to Epic, your default workspace will open. Click the ⟳ icon in the upper left hand corner to open the Dashboards workspace if this is not open by default.


2. Your default dashboard will open. If you do not have a default dashboard assigned, the system will prompt you to open one. Clicking the blue hyperlink "Click here to open My Dashboards" will open a the Dashboard Launcher.
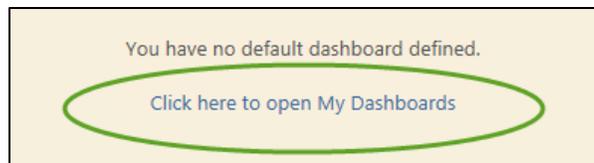
3. If you have a default dashboard, click the ⊕ icon on the left hand side of the screen.

4. The Dashboard Launcher opens. This is a list of all dashboards that are available to you. From here you can set a dashboard as your default dashboard, set a dashboard as your primary dashboard, open a new dashboard, or switch to another open dashboard.
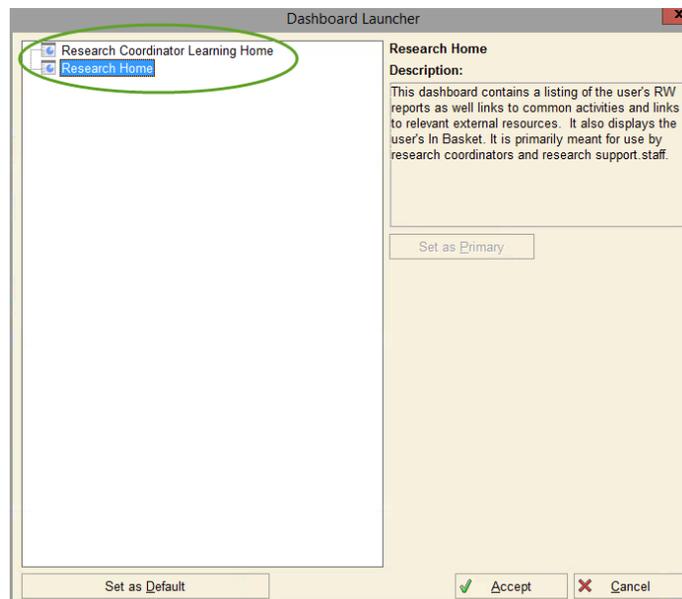
Accessing the Learning Home Dashboard

The Learning Home Dashbaord has helpful tips and guides to assist you as you work in Epic.

1. Go to your dashboards by clicking the ![icon] icon in the upper left hand corner of the screen.
2. Click the ![icon] icon to see other dashboards you have opened. For help on opening a dashboard, see the section entitled "Opening a New Dashboard".
3. Select the Learning Home Dashboard from the drop down list. This will switch your dashboard to the Learning Home Dashboard. You can set this dashboard to appear by default (see the section entitled "Choosing a Default Dashboard").
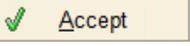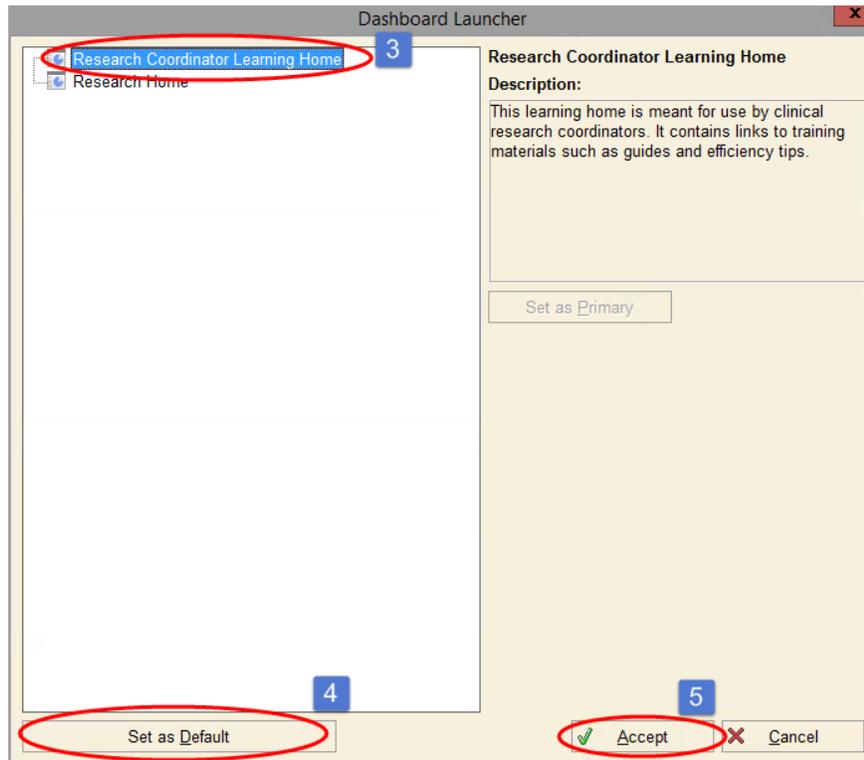
Opening a New Dashboard

1. Go to your dashboards by clicking the ![icon] icon in the upper left hand corner of the screen.
2. Click the ![icon] icon on the left hand side of the screen to view your available dashboards. If you need help viewing your available dashboards, see the section entitled "Viewing Available Dashboards".
3. With the Dashboard Launcher open, select the dashboard you wish to open from the list.

4. Click ![Accept] .
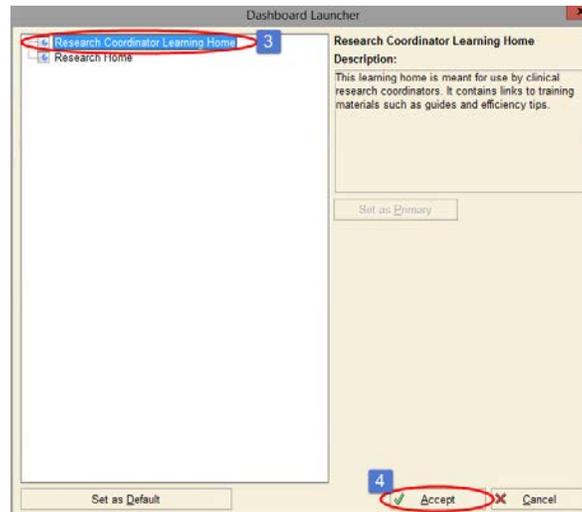
Choosing a Default Dashboard

1. Go to your dashboards by clicking the ⌖ icon in the upper left hand corner of the screen.
2. Click the ➕ icon on the left hand side of the screen to view your available dashboards. If you need help viewing your available dashboards, see the section entitled "Viewing Available Dashboards".
3. With the Dashboard Launcher open, select the dashboard you wish to open from the list.
4. Click the **Set as Default** button.
5. Click ✔ Accept .

Personalizing your Dashboards

1. Go to your dashboards by clicking the ⬤ icon in the upper left hand corner of the screen.
2. Click the ⚙ icon.
3. In the screen that appears you can change the name, description, layout, and color scheme for your dashboard and then save it as your own.
4. To change the layout, hover over the name of the section under **Components.** If it becomes a four-way arrow, click and drag the section into a different position.
5. To change the color scheme or name of a section, click the 🔧 icon for the section.
6. When you are finished, click the **Save As** button to create a personalized copy of your dashboard. Leave the box next to "Set as primary dashboard" checked. This will make your copy of the dashboard appear instead of the system copy.
7. Click ✔ Accept