How To…. Manage Dashboard Widgets

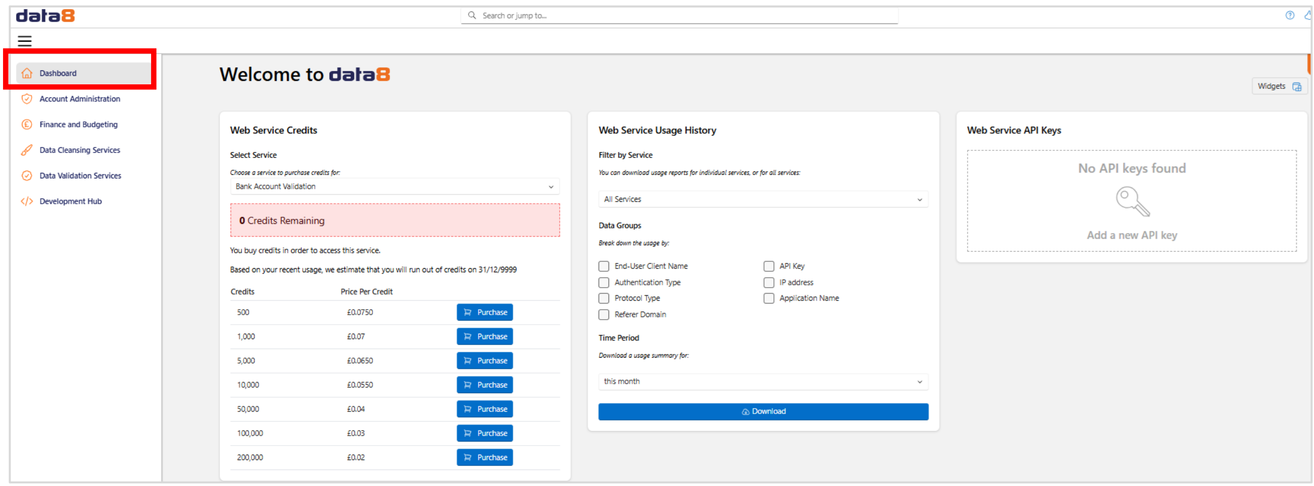
This document serves as a guide for managing Dashboard Widgets available on Data8's website. The document will provide step-by-step instructions on how to add, customise, rearrange, and remove widgets to optimise your dashboard for improved data visibility and workflow efficiency.

Dashboard widgets are customisable, interactive components that allow you to display key information, metrics, or tools directly on your dashboard. They enable you to monitor data, track performance, or access frequently used functions quickly and easily. By effectively managing these widgets, you can tailor your dashboard to your specific needs, ensuring that the most relevant and accurate information is always available.

To access your dashboard and the *Dashboard Widgets* button, click the **Dashboard** button which can be found on the left-hand side of the screen.

By default, when you access your dashboard for the first time, the following screen will be displayed. **N.B.** this screen is subject to change.

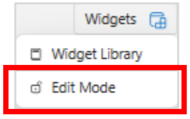
See screenshot below:



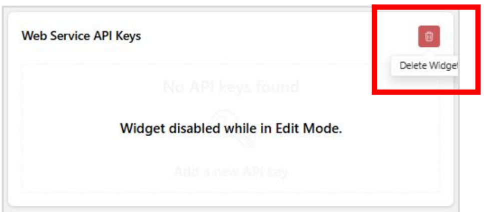
Click the **Widgets** button located at the top right of your *Dashboard*.

The pop-up will display two options:

1. *Widget* Library: Shows all available *Widgets*.
2. *Edit Mode*: Allows you to delete any *Widgets* displayed on the screen.



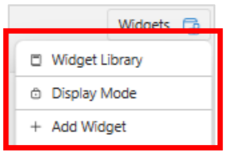
Click the **Edit Mode** button.



This will display an editable dashboard. The *Widgets* displayed on the screen will show a message which reads "*Widget disabled while in Edit Mode",* (see screenshot left).

To remove any *Widget* from the screen, click the **Delete Widget** button located at the top right corner of the *Widget*.

To further edit the *Widgets* displayed on the screen:



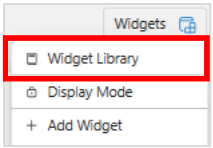
Click the **Widgets** button at the top right corner of the dashboard.

A pop-up will be displayed with three options to manage your dashboard widgets:

1. *Widget Library* – Enables you to add multiple *Widgets* to your dashboard in one process and are categorised as follows:
    a. *Available*: The *Widget* can be added to your dashboard by selecting it from the drop-down and clicking *Add*.
    b. *Ineligible*: The *Widget* exists, but currently you are not eligible to use it. For further assistance, please contact your Account Manager.
    c. *Added*: The *Widget* has already been added to your dashboard.

2. *Display Mode* – Returns you to the original dashboard screen.

3. *Add Widget* – Displays a pop-up that enables you to add *Widgets* individually. Detailed instructions for this process are provided in the next section.

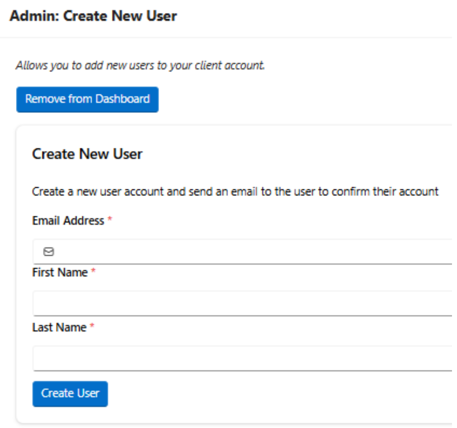


In the following section, we will cover how to add multiple *Widgets* in a single step.

Click the **Widget Library** button.

The *Dashboard Widget Library* will be displayed, which provides a complete list of all available *widgets* that can be added to your dashboard, if eligible.

To add a *widget*, click the drop-down arrow which is located at the top right of any widget marked as *Available* and click the **Add to Dashboard** button.

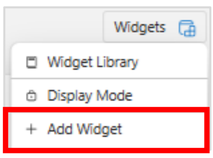


The *widget* is instantly added to your dashboard, and the button will change to *Remove from Dashboard.*

To remove the *widget* from your dashboard, click the **Remove from Dashboard**.

Below the *Add/Remove from Dashboard* button, the *widget* will be displayed on the screen.

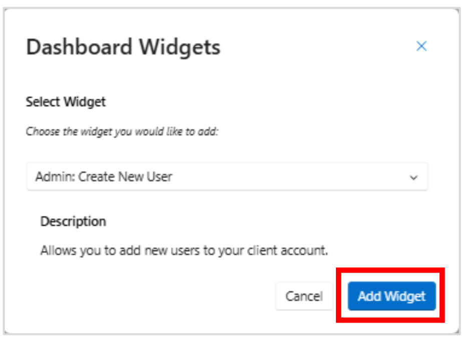
You can repeat this process for multiple widgets, adding them all in one step.



In the following section, we will cover how to add an individual *Widget*.

Click the **Add Widget** button.

A *Dashboard Widgets* pop-up box will be displayed, enabling you to select from a picklist of *Widget* options. At the bottom of this pop-up box, a description of what each option allows you to do is shown.

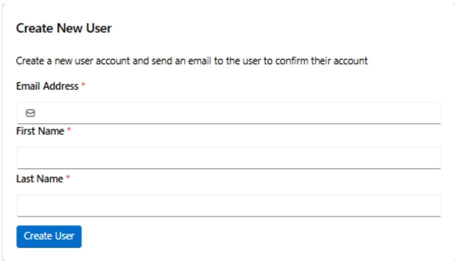


Ensure the *Admin: Create New User widget* is selected from the picklist. This *widget* allows you to add new users to your account.

Click the **Add Widget** button which is located at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.

Click **Display Mode** to enable all widgets on the screen.



The *Create New User* widget will be displayed on your screen. This widget allows an administrator to create a new user account, triggering an email to be sent to the user to confirm their account, (see screenshot left).

To create a new user, the following information must be provided:

1. Email Address
2. First Name
3. Last Name

All fields in the widget are mandatory, as indicated by the * next to each field.

This concludes the process instructions for you to *Manage Dashboard Widgets*.

In the following section, we will explore the other *Widgets* available to help you identify which widgets will be displayed when selected.

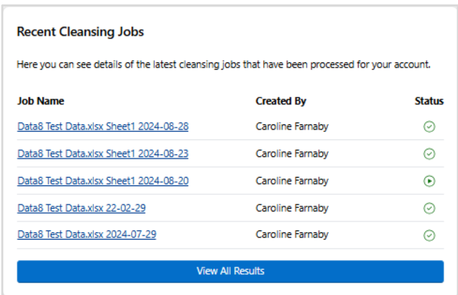
Following the instructions above return to the *Add Widget* screen

Ensure the *Cleansing: Recent Cleansed Jobs widget* is selected from the picklist. This *widget* shows a summary of any on-going or completed cleansing jobs.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.

Click **Display Mode** to enable all widgets on the screen.



The *Recent Cleansing Jobs* widget will be displayed on your screen. This widget displays the *Job Name*, the user who ran the job, and the *Status*, whether the job is in progress, completed, or expired, (see screenshot left).

At the bottom of the *Widget*, there is a *View All Results* button. Clicking this will display the *Download Cleansed Data* screen, where you can search for all cleansed data jobs that you have previously run.

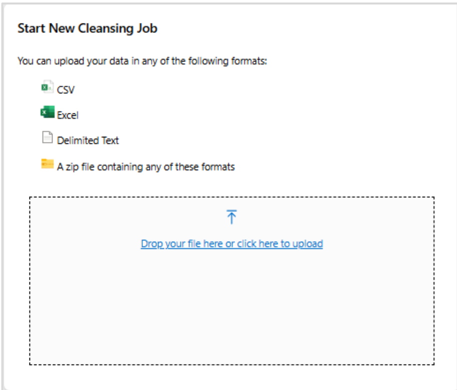
For more information regarding the search functionality, refer to the 'How to…. Run a Data Cleanse' Job.

Return to the *Add Widget* screen.

Ensure the *Cleansing: Start New Cleansing Job widget* is selected from the picklist. This *widget* enables you to start a new data cleanse job directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.



Click **Display Mode** to enable all widgets on the screen.

The *Start New Cleansing Job* widget will be displayed on your screen. This widget displays the accepted file formats that can be used to import data within Data8 Online:

- CSV
- Excel
- Delimited files

Additionally, ZIP files are accepted if they contain one of the supported file types, such as CSV, Excel, or Delimited files.

Below this section, there are two options for uploading a data file:

1. *Drag a File here to upload* – Allows the user to drag and drop a data file into the designated area.
2. *Click here to upload* – Enables the user to click the button to navigate and select the file. (See screenshot left.)

For more information regarding how to import a file into Data8's Data Cleansing solution, refer to the 'How to…. Run a Data Cleanse' Job.

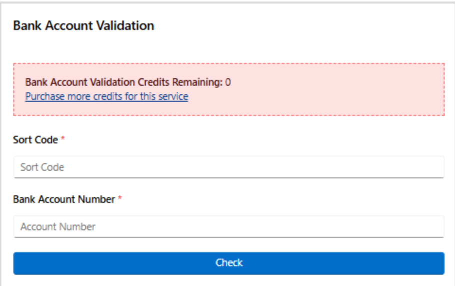
Return to the *Add Widget* screen

Ensure the *Interactive: Bank Account Validation* widget is selected from the picklist. This widget enables you to use the bank validation service directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.

Click **Display Mode** to enable all widgets on the screen.



The *Bank Account Validation* widget will be displayed on your screen.

At the top of the *Widget*, you can see the number of credits available in your account for running bank account validation queries. Below this, there is a link to purchase additional credits for the service.

To validate a bank account, the following information must be provided:

1. Sort Code
2. Bank Account Number

All fields in the widget are mandatory, as indicated by the * next to each field.

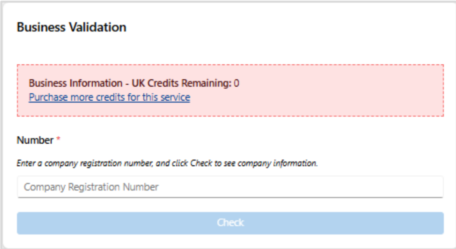
At the bottom of the *Widget*, click **Check** to run a validation on the specified bank account.

Return to the *Add Widget* screen

Ensure the *Interactive: Business Validation* widget is selected from the picklist. This widget enables you to use the business validation service directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.



Click **Display Mode** to enable all widgets on the screen.

The *Business Validation* widget will be displayed on your screen.

At the top of the *Widget*, you can see the number of credits available in your account for running business validation queries. Below this, there is a link to purchase additional credits for the service.

To validate a business, the following information must be provided:

1. Company Registration Number

This field is mandatory, as indicated by the * next to the field.

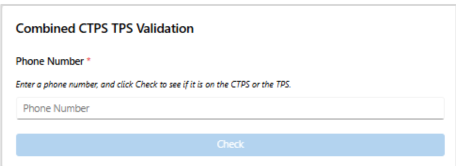
At the bottom of the *Widget*, click **Check** to run a validation on the specified business.

Return to the *Add Widget* screen

Ensure the *Interactive: Combined CTPS TPS Validation* widget is selected from the picklist. This widget enables you to use the combined CTPS and TPS validation service directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.



Click **Display Mode** to enable all widgets on the screen.
The *Combined CTPS TPS Validation* widget will be displayed on your screen.

To validate a telephone number, the following information must be provided:

1. Phone Number

This field is mandatory, as indicated by the * next to the field.

At the bottom of the *Widget*, click **Check** to run a validation on the specified telephone number.

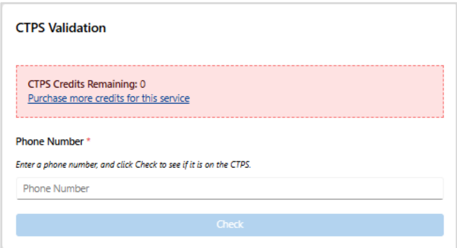
Return to the *Add Widget* screen

Ensure the *Interactive: CTPS Validation* widget is selected from the picklist. This widget enables you to use the CTPS validation service directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.

Click **Display Mode** to enable all widgets on the screen.



The *CTPS Validation* widget will be displayed on your screen.

At the top of the *Widget*, you can see the number of credits available in your account for running CTPS validation queries. Below this, there is a link to purchase additional credits for the service.

To validate a telephone number, the following information must be provided:

1. Phone Number

This field is mandatory, as indicated by the * next to the field.

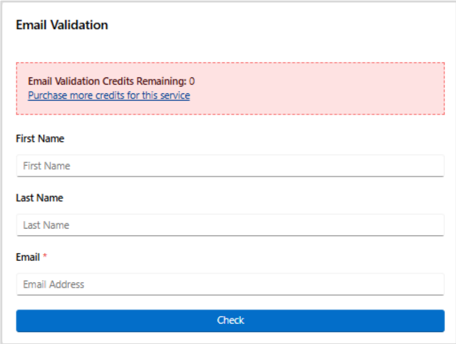
At the bottom of the *Widget*, click **Check** to run a validation on the specified telephone number.

Return to the *Add Widget* screen

Ensure the *Interactive: Email Validation* widget is selected from the picklist. This widget enables you to use the email validation service directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.



Click **Display Mode** to enable all widgets on the screen.

The *Email Validation* widget will be displayed on your screen.

To validate an email address, the following information must be provided:

1. First Name
2. Last Name
3. Email Address

Only the Email Address field is mandatory, as indicated by the * next to the field.

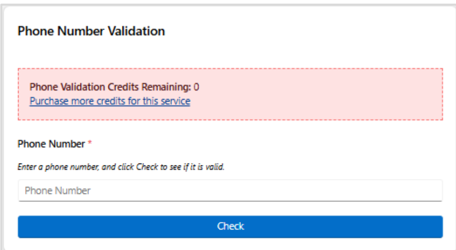
At the bottom of the *Widget*, click **Check** to run a validation on the specified email address.
Return to the *Add Widget* screen

Ensure the *Interactive: Phone Number Validation* widget is selected from the picklist. This widget enables you to use the telephone number validation service directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.

Click **Display Mode** to enable all widgets on the screen.



The *Phone Number Validation* widget will be displayed on your screen.

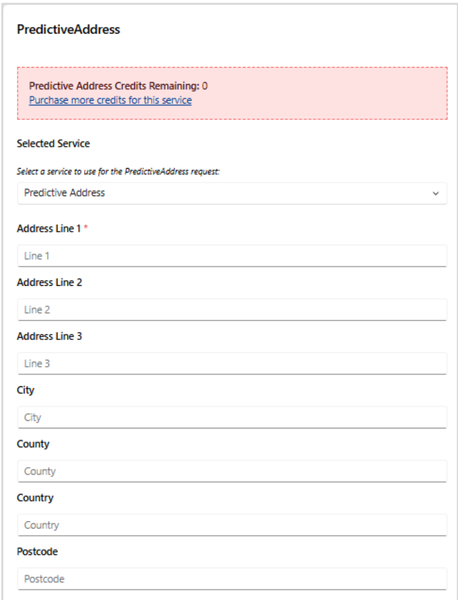
To validate a telephone number, the following information must be provided:

1. Phone Number

This field is mandatory, as indicated by the * next to the field.

At the bottom of the *Widget*, click **Check** to run a validation on the specified telephone number.

Return to the *Add Widget* screen



Ensure the *Interactive: PredictiveAddress Validation* widget is selected from the picklist. This widget enables you to use the predictive address service directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.

Click **Display Mode** to enable all widgets on the screen.

The *PredictiveAddress Validation* widget will be displayed on your screen.

At the top of the *Widget*, you can see the number of credits available in your account for running *PredictiveAddress* validation queries. Below this, there is a link to purchase additional credits for the service.

Under *Selected Service*, there is a drop-down menu, offering options for Predictive Address with or without Not Yet Built and Multiple Residency data.

To validate a predictive address, the following information must be provided:

1. Address Line 1
2. Address Line 2
3. Address Line 3
4. City
5. County
6. Country
7. Postcode

Only the Address Line 1 field in the widget is mandatory, as indicated by the * next to the field. As you input the address information, the *PredictiveAddress* widget updates automatically, suggesting address options in real-time to streamline the data entry process.

Return to the *Add Widget* screen

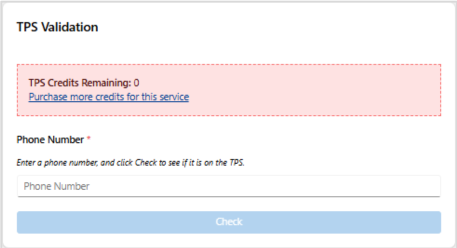
Ensure the *Interactive: TPS Validation* widget is selected from the picklist. This widget enables you to use the TPS validation service directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.

Click **Display Mode** to enable all widgets on the screen.

The *TPS Validation* widget will be displayed on your screen.



At the top of the *Widget*, you can see the number of credits available in your account for running TPS validation queries. Below this, there is a link to purchase additional credits for the service.

To validate a telephone number, the following information must be provided:

1. Phone Number

This field is mandatory, as indicated by the * next to the field.

At the bottom of the *Widget*, click **Check** to run a validation on the specified telephone number.

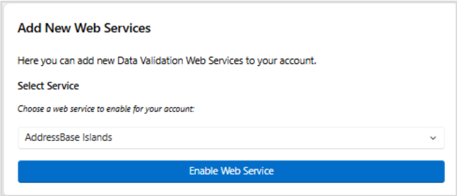
Return to the *Add Widget* screen

Ensure the *Validation: Add New Web Services* widget is selected from the picklist. This widget enables you to access a range of data validation services such as AddressBase Islands, Companies House, etc directly from your dashboard.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.

Click **Display Mode** to enable all widgets on the screen.



The *Add New Web Services* widget will be displayed on your screen.

There are a number of web services which can be accessed via this widget, these include:

1. AddressBase Islands
2. Companies House
3. Country Detection
4. Credit Card Validation
5. Demographics
6. Eircode – Web Per Click
7. Energy Performance Certificates
8. Find My Nearest – Web Per Click
9. Geocoding – Web Per Click
10. MPS
11. Postcode Lookup – Internal User
12. Postcode Lookup – Internal User (Single Postcode Area)
13. Postcode Lookup – Web Per Click
14. Postcode Lookup Thoroughfare – Internal Server
15. Postcode Lookup Thoroughfare – Internal User
16. Postcode Lookup Thoroughfare – Internal User (Single Postcode Area)
17. Postcode Lookup Thoroughfare – Web Per Click
18. PredictiveAddress – (With Not Yet Built and Multiple Residency)
19. PredictiveAddress – Premium
20. Salacious Name
21. Stop Files
22. Telephone Formatting
23. Telephone Validation
24. USA Telephone Validation

Each web service to be added should be selected individually from the list.

At the bottom of the *Widget*, click **Enable Web Service** to gain access to the selected web service.

Return to the *Add Widget* screen

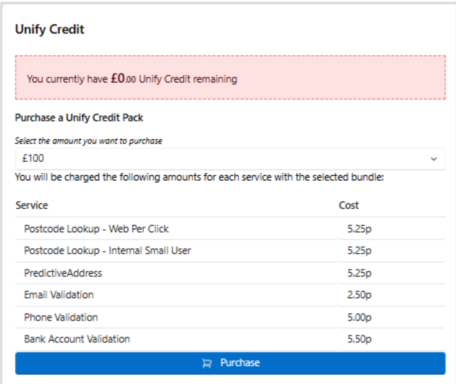
Ensure the *Validation: Unify Credit* widget is selected from the picklist. This widget enables you to view how much unify credit is remaining on your account.

Click the **Add Widget** button at the bottom right of the pop-up screen. You will then be returned to the main dashboard.

Click the **Widgets** button in the top right of the screen.

Click **Display Mode** to enable all widgets on the screen.

The *Unify Credit* widget will be displayed on your screen.



At the top of the *Widget*, you can see the number of unify credits available in your account.

Below this, there is a drop-down which enables you to purchase additional unify credits. You can purchase the following unify credit packs:

1. £100
2. £250
3. £500
4. £1,000
5. £1,500
6. £2,000

The next section on the *Widget* provides you with both the name of the *Service* and the *Cost* of that service.

At the bottom of the *Widget*, click **Purchase** to buy additional unify credits.