CRYSTAL: NAVIGATING THE DASHBOARD
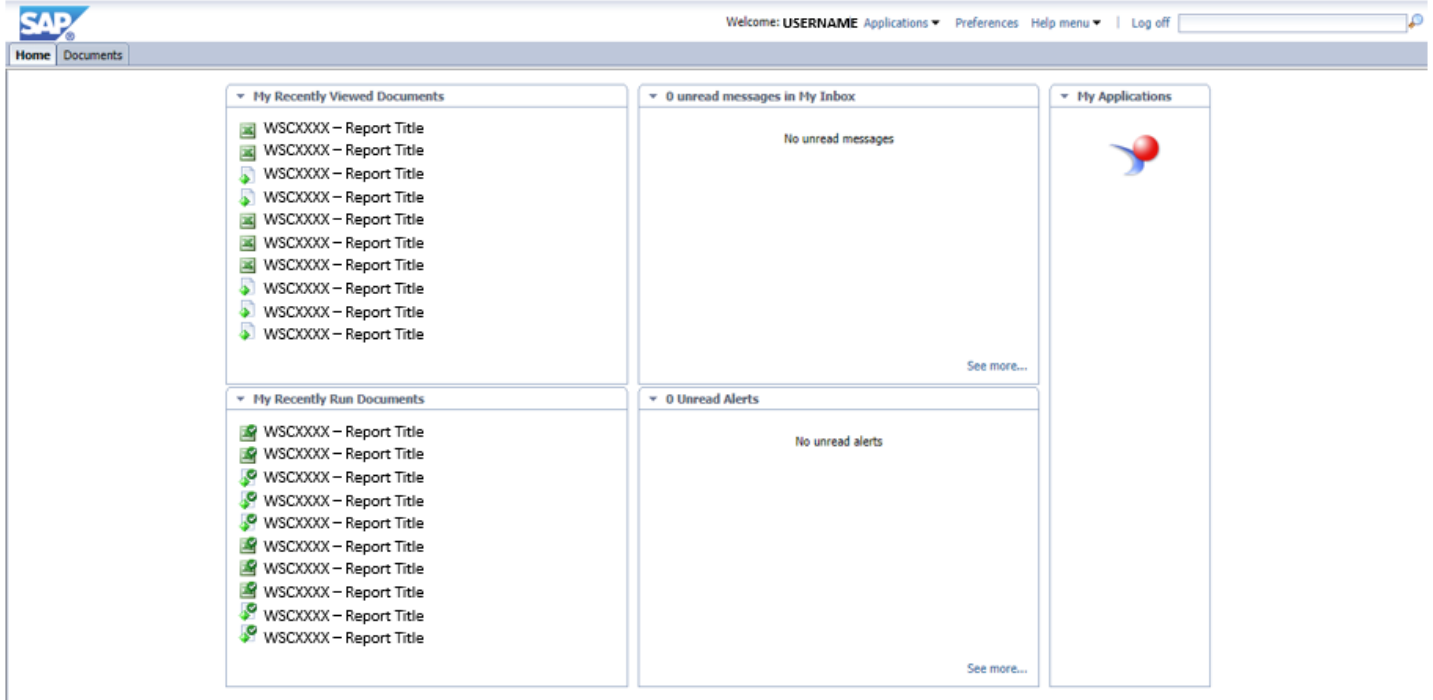
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PROCESS

The Dashboard allows users to navigate within the homepage of Crystal.

THE DASHBOARD

HOME

By default, you will be taken to the "Home" page after logging into Crystal.

My Recently Viewed Documents
Provides a list of recently viewed documents for quick reference.

My Recently Run Documents
Provides a list of recently viewed run documents for quick reference.

My Inbox
Provides a quick view for any unread messages.   Crystal also includes a messaging system which allows you to send objects or instances (or shortcuts to objects/instances) to other users. You can send objects from the document list as you browse, or instances from the "History" page.

Unread Alerts

Provides a quick view for any unread alerts. Alerts are custom messages created by Crystal Reports that provide more information about the report data or prompt you to perform an action. When you view a report, alerts appear when certain conditions are met by report data.
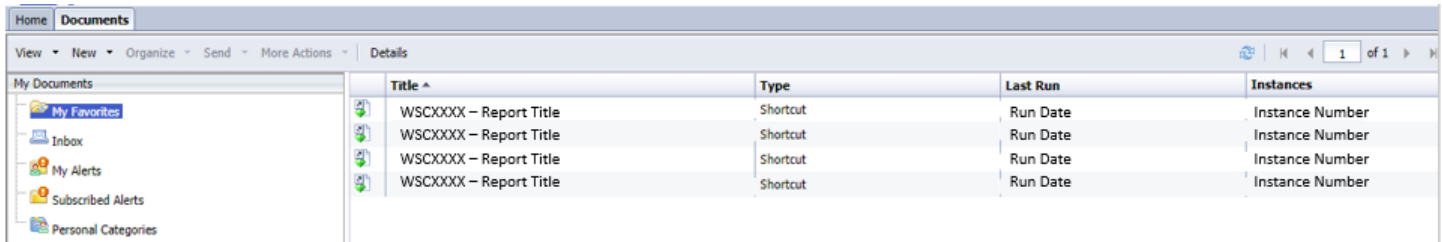
DOCUMENTS

My Documents

The My Documents tab provides users with an option to view My Favorites. Additionally, users are provided with another option to view their Inbox, My Alerts, Subscribed Alerts, and Personal Categories also found on the homepage.
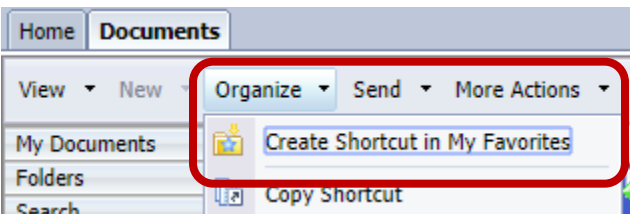
My Favorites

My Favorites provides a list of any reports that are tag as favorite for quick reference.

Users can add reports to My Favorites by clicking the title of the report, choosing "Organize" from the Documents menu, then "Create Shortcut in My Favorites."

Folders

The Folders tab allows users to view all provisioned access and corresponding reports.
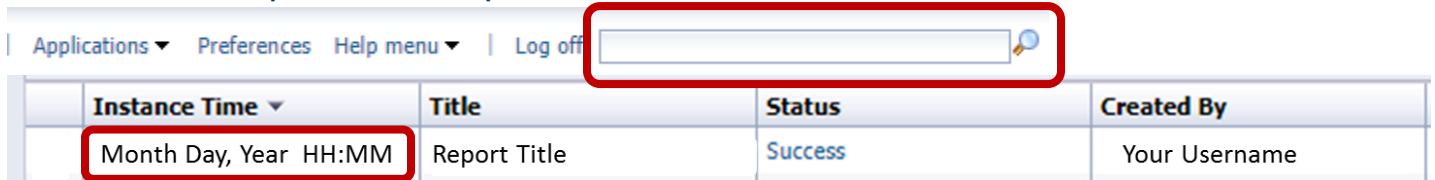
Search

The Search tab allows users to search by report title, if the specific title is known.

EX: WSCXXXX

Users can also use the search bar in the top right corner of the dashboard to search for a report, if the specific title is known.

CONTACT

If you have any additional questions, please contact our office at banneraccess@augusta.edu.