

Home (Dashboard)

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Overview	Description
	<p>The "Home" area (also called "Dashboard") is offering following main functionality:</p> <ol style="list-style-type: none">1. Dashboard Tiles: in the center area, tiles help to speed up executing common tasks. The tiles are also known as "quickstart buttons". We are explaining each tile's functionality in the sub chapters.2. Dashboard Statistics: provides statistical information about envelopes currently active on the platform and their status, i.e. envelopes that are not deleted.3. Beside the main functionality it is also possible to access the account settings via the dashboard

Dashboard Tiles

There are four big tiles in the center area. Those are providing following functionality:

Send new Document

Starts creating a new envelope draft; typically be sent to remote recipients via e-mail.

The tile also supports following Drag&Drop interaction:

Drag any local document from the operating system (e.g. MS Windows) and drop it on the tile to create a draft where the file(s) are directly added.

Sign Document

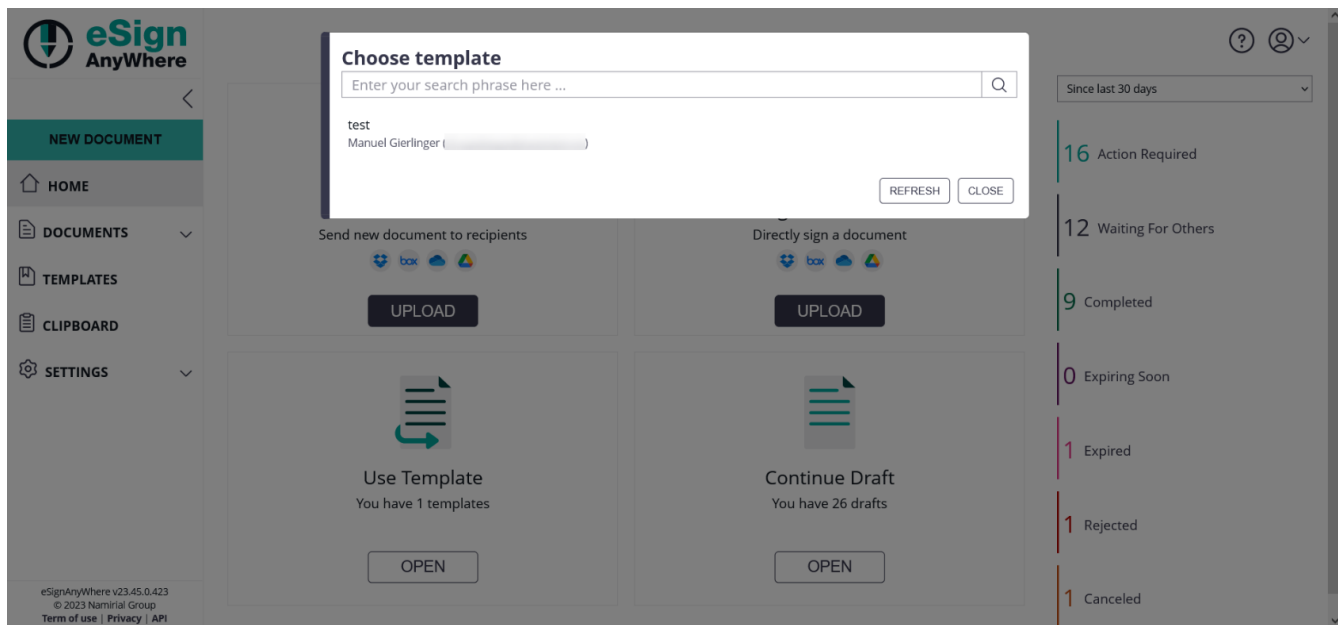
Starts creating a new envelope draft; but with the current user (sender) as first recipient. When the sender is the first recipient, the sender can directly go to the signing step after defining the envelope and bypass the sending via email.

The tile also supports following Drag&Drop interaction:

Drag any local document from the operating system (e.g. MS Windows) and drop it on the tile to create a draft where the file(s) are directly added.

Use Template

Allows to select a template that was defined earlier, and create a new draft based on the template definitions. Therefore, a click on the tile opens a dialog listing all the templates that can be used. The chapter "[Templates](#)" will explain in detail how the template feature is working, and when this feature is available. In general, the templates selection shows all templates by default, where the user has the permission to read and use them. Permissions configuration is described in detail in [Settings Reference, Roles and Permissions](#). By default, a power user is able to access his own templates, and all templates created by a team member and shared with the team. A search filter allows to limit the result list to entries matching the entered search criteria. The search result is filtered as soon as at least one character is entered. The Teams chapter explains the rules which apply for sharing templates across team members.



The search result will not be refreshed automatically e.g. when another user created a draft and shared it with team members. To refresh the list in such scenarios, it is required to use the refresh button.

Continue Draft

Opens a dialog which allows to select an envelope from envelopes in draft state. This tile will help to continue a draft that was created before, but where the envelope was not yet sent.

The search filter allows to limit the result list to entries matching the entered search criteria. The search result is filtered as soon as at least one character is entered.

The result will not be refreshed automatically e.g. when another user created a draft which is shared with team members. To refresh the list in such scenarios, it is required to use the refresh button.

Dashboard Statistics

The dashboard statistics show the number of envelopes in a particular status.

Depending on system configuration, the dashboard statistics may also be configured in a way that it does not automatically calculate the numbers (as this is performance relevant) but shows for each indicator a button to calculate the numbers on request:

Since yesterday ▾

4 Action Required

1 Waiting For Others

1 Completed

0 Expiring Soon

0 Expired

0 Rejected

0 Canceled

System Alerts

In case of configured instance wide system alerts, these are (beside other locations in the application) displayed on top of the dashbard.

⚠ Please add at least 1 document. [Support ID: 6f859bab-070c-4271-]

See [Admin Web - System Alerts](#) for additional information.