

Which Widget Is It?

A widget is a box – like this one -- that you add to the Home Page. It has one function and it takes up as much space as it needs to show its information.

You add widgets that link to applications, BAQ grids, Data Discovery chart views, websites, and a bunch of other things. Use these different types of widgets to design a Home Page that's just right for you.

During the first part of this course, you'll explore the different types of widgets. You learn about what each widget shows on your Home Page.

Next you'll see how to add a tab to your Home Page. This tab is blank, so you can put whatever widgets you want on it.

You'll then add a widget to this blank tab. You select the widget you want and place it on the new tab.

You can also change what information displays on widgets. The course ends by showing you how to edit them.

Select an option to learn more about widgets.

Objectives

- Which Widget Do I Want?
- Adding a New Tab
- Adding a Widget
- Editing Widgets

Which Widget Do I Want?

Here are the different types of widgets you can add to your Home Page. Select a widget to find out what it does.

Most widgets you see on the default Home Page are App Links. Use the App Link widget to launch an application from the system. If you use the Customer Tracker a lot, add it as an App Link widget. Tap its widget and the Customer Tracker displays.

If you need to see Business Activity Query results, use a BAQ Grid type. Data from the BAQ displays in the grid. Refresh the BAQ widget at any time to see the latest data.

Discovery Cards show a key piece of calculated information from your database, like how many purchase orders are open. Add these to your Home Page to see current information.

Display a chart – such as Customer Days Past Due – to see data in line, bar, pie, and other chart formats. Select the Discovery Chart View widget to add a chart to the Home Page.

A Data Discovery Dashboard shows several discovery views at once so you can compare their data. If you have a set of views that you often use, add a dashboard widget to your Home Page so it is easy to see.

Epicor IoT combines Microsoft Azure IoT Hub with data and context from your system. Add this widget to show the details about the device or sensor that streams data to the hub. If your system has Advanced Data Discovery, you can add this widget type.

A KPI, or Key Performance Indicator, measures how close you are to achieving a key business objective. Use this widget to add Data Discovery KPI Cards to your Home Page. If your system has Advanced Data Discovery, you can add this widget type.

To display a custom image on your Home Page, such as your company logo, use the Image widget.

Use the Text Label widget to add any text you need to show on your Home Page.

Select the Web Application widget to host web applications. These are system applications, like the Manufacturing Execution System (MES) that must display within a browser.

Use the Website widget to add a website link to your Home Page. Select the widget and your browser opens to this web page. Use this widget to link to your company website or a supplier's website.

Adding a New Tab

Use Tabs to categorize and arrange your widgets so they make the most sense to you.

The Quick Launch tab installs with the system. It already has a lot of widgets on it, so let's add a new tab to your Home Page.

Start by selecting the Overflow Menu and then Edit.

Tap the plus (+) next to the existing Quick Launch tab.

In the Add A Tab dialog give your new tab a name (like My Widgets) and click Ok.

Tap Save in the Add Widget panel. The My Widgets tab now appears on the Home Page. Its blank, ready for you to add widgets to it.

Adding a Widget

When you edit the Home Page, the Add Widget panel displays as well. The widgets on your system appear on your panel.

Some widgets, like the Discovery IoT widget, are only available if Advanced Data Discovery is installed.

Let's add an App Link widget to your My Widgets tab. This links an application to your Home Page. You update customer records a lot, so let's add an App Link to the Customer application.

Select the App Link widget.

Depending the widget type you select, you determine what the widget displays and define how it looks on your Home Page.

For this App Link widget, select the application that opens when you press it. In the App field, start typing for matches and select the Customer application.

You also decide on other details, like the widget's color block, and what image shows up on it.

After you finish selecting your options, press Ok.

The Customer App Link now displays on your Home Page.

Tap Save on the Add Widget pane. The system adds the Customer widget to your tab.

Tap this widget and the Customer application launches. You can now select a customer from the landing page. That's all you do. You now have a widget that launches the Customer application.

Editing Widgets

You can always edit widgets and rearrange them.

When you are in edit mode, each widget has an icon with three dots on it. That means you can edit the widget.

Do this by tapping the icon and selecting Edit.

This launches the dialog for the widget. Make the changes you want, like changing the widget's color.

Then tap Ok. The widget now displays on your Home Page with a different color.

Rearrange a widget by dragging and dropping it to a new spot.

To make a widget bigger or smaller, select the corner of the widget and drag it to the size you like.

Some widgets, such as a BAQ Grid, Discovery Chart View, and Embedded Website, can display as tabs on the Home Page.

Use the Promote button to display the widget as its own tab.

If you don't want the widget to display as a separate tab, select the Overflow menu and Demote.

To place widgets on different tabs, select the tab.

Since you are in Edit mode, the Add Widget panel stays open. Add the widgets to this new More Widgets tab.

When you finish, save the Home Page layout.

Use widgets to show and access the data you use the most. They help you quickly see the information you need.

Recap

That's the end of the widgets course. Let's review what you learned.

During the first part of this course, you explored the different types of widgets. You selected the widgets you wanted to learn more about.

Next you learned how to add a tab to your Home Page. This tab was blank, ready for you to place widgets on it.

You then added a widget to this blank tab. You selected the widget and defined its options.

The course ended by showing how to change the widget's information, color, size, and location.

Add widgets to your Home Page that help you see what you need. And take more Foundations courses to learn about the main features of your system.

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