Layouts & Widgets

Getting Started · https://learnpcr.pcrecruiter.net/site/docs/getting-started/layout-widgets/

The Layout of many screens within the system can be altered to place the information you need up front and to maximize the available space on your particular screen.

Layouts can be altered on a per-user basis, although it is typical for all users to share the same layouts for consistency.

Many screens support multiple layouts, which can be switched between as needed via the View Options menu at the top left corner of the area.

Editing Layouts

Where layout editing controls are available, such as on the Dashboard and Workspace screens, you can click the **Pencil** icon at the top left corner of the screen. This is typically next to the View Options dropdown.

After clicking the pencil, you'll be in Edit mode. The menu across the top of the Layout will display:

- An 'X', which exits Edit mode
- A Save icon to store your edits
- A 'Layout Name' box for giving the current layout a label by which to recognize it in the View Options menu

A horizontal menu containing the configurable **Widgets** available for the current layout will appear across the top of the screen to the right of the Layout Name. The arrows at the left and right of this menu will display additional Widgets where they exist.

- To add a Widget to the layout, click and drag it into the layout.
- To remove a Widget, click the trash icon at the top right corner of the Widget you wish to remove.
- To adjust the contents or settings of the Widget, click the gear icon at the top right corner of the Widget.

- To change the position of a Widget, click and drag it within the layout.
- To change the size of a Widget, click and drag the handle at the lower right corner of the Widget. (Some Widgets have minimum or maximum sizes.)

After making your desired edits, click the Save icon to the left of the Layout Name.

Widget Settings

While some Widgets are not configurable and can only be added, removed, or resized, others will have a Settings gear at the top right corner. Clicking this gear will present the available, context-sensitive options for that Widget.

The most commonly used Widget Settings you're likely to adjust are those in a **Field List Widget**. These Widgets present a group of related fields for the current type of record. To configure a group of fields:

1. Open the Workspace tab on any record, such as a Name, Company, or Position.
2. Click the **Pencil** to enter the Layout editing mode.
3. If no Field List Widget exists, or if you wish to add additional ones, select it from the Widget menu at the top of the Layout (e.g. "Candidate Field List") and drag it into the Layout.
4. Click on the **Gear** icon at the top right corner of the Widget to enter the Widget Settings.
5. Within a blank Field List Widget's Settings, the left side will show a preview of the list and the right side will contain the editing controls.
6. The "Fieldlist Title" box at the top of the right side allows you to set a name for the list based on the content you'll be putting into it (e.g. "Contact Info", "Billing Details", "Position Contact", etc.)
7. To the right of the "FieldList Title", you'll see a **Plus Sign** (**+**). Click on this to add a new field to the list included in the Widget. Within each of these fields:
    - Use the four-pointed arrow to move them up or down in the row order, or the trashcan to remove them.
    - Use the Pencil icon to access the field-level settings:
        - **Field**: Scroll or type here to select which field from the record should be displayed.

        - **Label**: Change the label that's displayed for this field, which may be helpful if the name of the field isn't descriptive of its intended use.
        - **Readonly**: Prevents this field from being edited.
        - **Required**: Prevents the record from being saved with an empty value for this field.
        - (Coming Soon) Default: Defines a value that will be automatically populated in this field.
    - Click the Pencil icon again to exit the field-level settings.
8. After completing your field selections, click **Done**.
9. Click the **Save** icon to store your edits to the Layout.

Dashboard Widget Descriptions

1. **Empty space:** A blank placeholder for your layout.
2. **Text/instructions:** A textbox such as this one where you can free type instructions/notes.
3. **Video:** Allows for an embedded link or uploaded video.
4. **Names on Position by latest Activity:** List of the most recent names with Pipeline activity which shows date and opens name record.
5. **Active Candidates:** Shows candidates that are active in Pipelines and their current interview status.
6. **Recently Modified Names:** List of the name records that were modified in order of most recent changes.
7. **Today's stats:** Clickable icons that jump to various lists based on today's activities.
8. **Standard Stats:** Pipeline and Web candidate stats.
9. **Activities over time:** Analytics graph of name record activities *(More options coming soon!)*.
10. **Info Panel:** Messages or announcements from PCR in a text box.
11. **Today's Schedule:** Calendar events scheduled for today.
12. **Appointment Interviews:** Today's scheduled interviews.
13. **Recently Modified records:** Shows all recently modified records (Names, Companies, and Positions).
14. **Recently Viewed records:** Shows all recently Viewed records (Names, Companies, and Positions).