

Client Training HQ

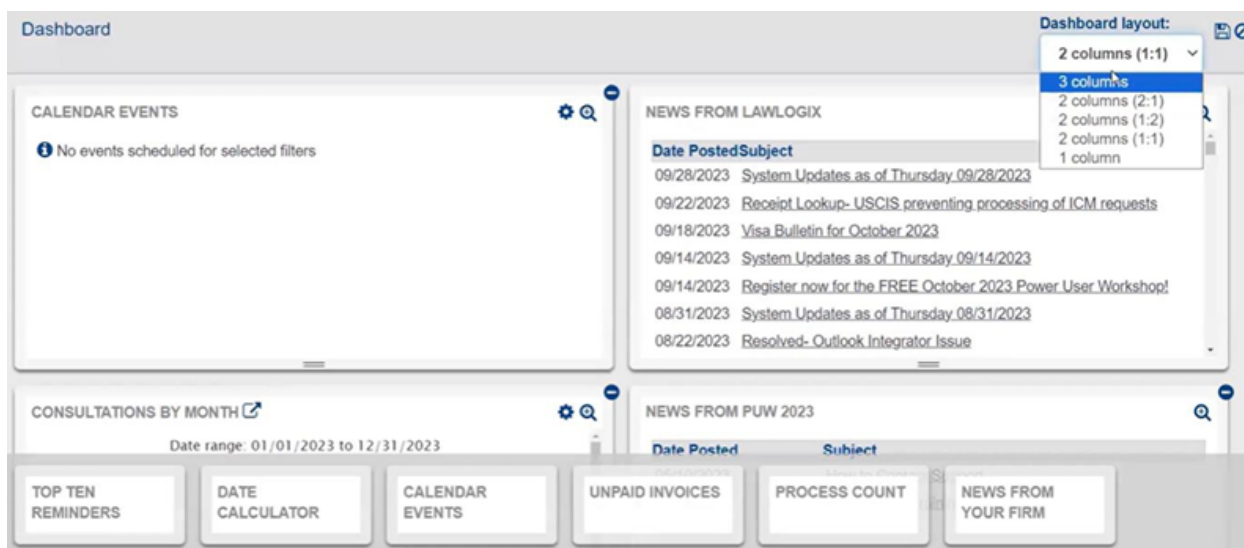
Customizing Your Dashboard

You can customize the Immigration Case Management (ICM) dashboard to better suit your needs, improving visibility into the most important data and insights. Customizing the widgets that appear on your dashboard can help you stay on top of active cases, past due reminders, upcoming reminders, reports, and events.

Customizing Your Dashboard

To edit the dashboard, from the ICM home page:

1. Click the **gear icon** at top right.
2. Click the *Dashboard layout* drop-down arrow and select three-column formatting.

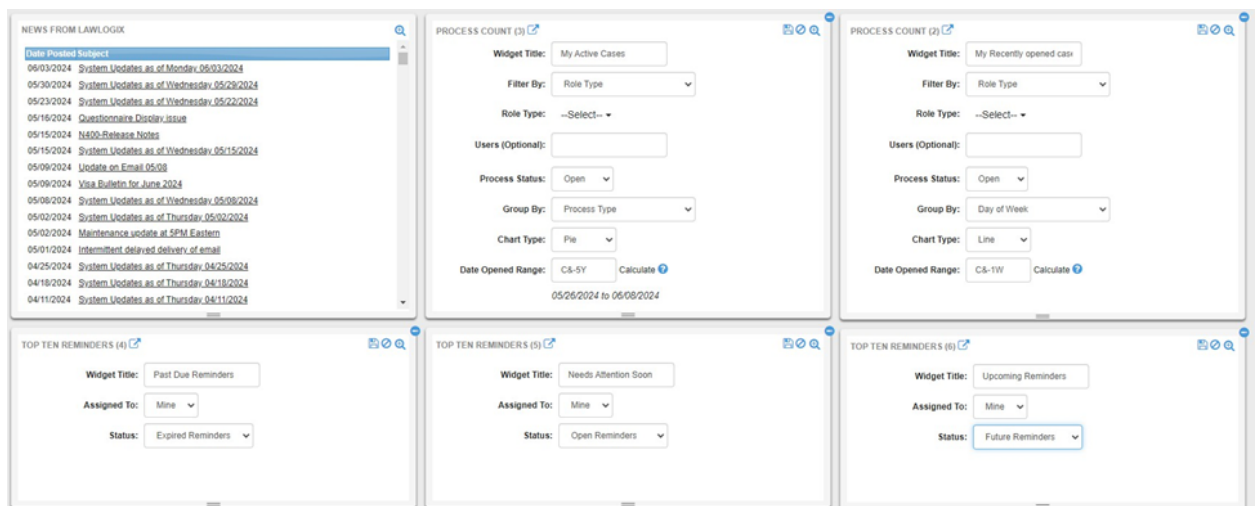


Note: Increasing the layout to three columns allows more widgets to be added.

3. Click the **floppy disk icon** to save changes.
4. Delete any unneeded widgets from your dashboard. You may delete most of the widgets currently present, but do not delete the NEWS FROM LAWLOGIX widget.

Images are examples and for information purposes only. They may vary across platforms and are subject to change.

5. Drag and drop your preferred widgets to the dashboard. We recommend adding the following widgets:
 - **Process Count:** This widget displays process counts by a set of filter criteria that you specify.
 - **Top Ten Reminders:** Customize the widget to see reminders that are past due, due soon, and upcoming.
 - **Date Calculator:** Calculate dates with ease.
 - **Reporting:** This provides visibility into the firm's ten most recently run reports.
 - **News from Your Firm:** Your firm may choose to post updates, news, and information that they would like to broadcast to the team.
6. Click the **gear icon** in the top right corner of each widget to customize the filter criteria based on your individual needs.



7. Click the **floppy disk icon** to save changes.

More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.