Wolters Kluwer

legisway essentials

User Manual

Onboarding Customisation

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1 Introduction

Legisway Essentials offers a high level of customisability. During the onboarding of your new dashboard, your consultant is able to customise a lot of the looks and feels of the system. This short overview explains which parts of the system can be customised. Of course similar changes can also be made on existing dashboards in your Legisway Essentials system, for this please contact your relationship manager, consultant or our support desk.

Your Legisway Essentials system from your perspective has three main components, first of all the first thing you see when you log in; a Dashboard. Next to this dashboard, when you create a new entry in the system, the form is the second main component. The third part of the front-end of your system is the display of existing entries in the system. All three of these components can be customised to your preferences. The options you have for customizing the different components will be discussed below.

1.1 Dashboards

Throughout the whole Legisway Essentials system, the different dashboards look somewhat similar, please see the image above. Most of them have a blue **create button** in the lop left, below that **one or multiple menu's**. On the right side, some of them have **tiles** to go to a different dashboard and below those tiles there is a **report** displayed.

Throughout the whole system the **top bar** is also in sight. For this last part, a few things can be customised, these customisations will come through the whole system:
- The logo can be changed to any image you prefer
- The contents of the **9-square menu** in the top right can be defined

In customising the Dashboards there are two parts that can be customised; the **menu's** and **tiles** and the **report.**

First, the **menu's**; the following can be changed:
- The text of any of the links as well as the blue create button
- The order in which the different menu links are displayed
- The names of the different menu boxes as well as the order in which they appear
- The location of the links in the menu boxes
- The use of the menu button (which report is displayed and how, as a new window or tab or within the screen you see)

For the **tiles** you have the following options for changes:
- Name of the tiles
- Order of the tiles
- Image in the tile → this is limited to a predefined set of images, contact your consultant to see which options are available

The **top bar** also has some things that can be changed per dashboard:
- The color of the bar
- The name of the dashboard text displayed in the bar

Then for the **report**; some configurations are possible to make this report fit your needs:
- The title of the report
- The ability to filter and/or search in columns can be put active or inactive
- The titles of the different columns
- The order of the different columns
- The columns displayed can be any field that can also be seen in the creation form and/or on the factsheet.
- Columns can be added or removed from the report

1.2   Forms

Next to what is displayed on the dashboard, the forms with which you insert new information in the system can also be configured to your needs. Please see the image below. Please note that when changing fields that are on multiple different creation forms (group company for instance) this change will influence all creation forms that contain that field. It is not possible to change these field specifically for one subject. The following changes can be made to the forms:

- The order of the fields
- The **name** of the field
- The **type** of the field (date, currency, number, text, text area, list, boolean etc.)
- **Text below** the fields (so-called assists)
- Make fields **mandatory/non-mandatory** (red asterisk indication)

1.3   Factsheet

The last part of the system that can be changed in terms of looks is the factsheet of a dossier. This factsheet is built of several tab pages and is customisable to some extent. The following changes are possible, as also indicated in the image below;

- The names of the **tab pages**
- The order of the **information displayed on the tab pages**
- The names of the **information displayed on the tab pages**
- The order of the **buttons in the right-hand menu**
- The names of the **buttons in the right-hand menu**

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