

Washington State Information Technology (IT) Project Dashboard Tip Sheet

Logging In and Resource Information

Tip: Your username is likely your email address

Logging in: <https://login.salesforce.com>

Dashboard: <https://waciportal.force.com/s/>

Dashboard Resources: https://waciportal.force.com/s/glossary/Glossary__c/Default

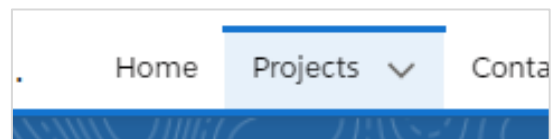
Training Recordings and Other Resources:

[IT Project Dashboard Resources | OCIO \(wa.gov\)](#)

Finding Project Data and Information

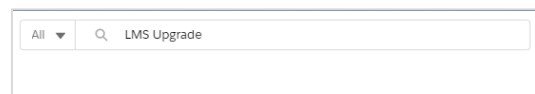
Tip: Make sure you are in the dashboard lightning app. If not, use the upper left menu (9 dots) to switch.

1. Click on the **Projects** tab.

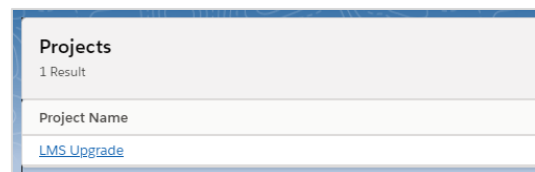


2. Click on a project's name to view the project or use the **New** button to enter a new project.

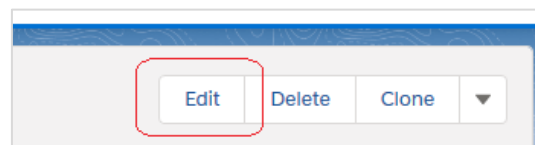
3. In order to find a specific project, search for it using the **Global Search** bar at the top. Type in a search term and hit enter.



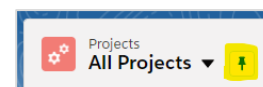
4. Click on the project name to get to the **Project Details**.



5. In the project detail screen, click the **Edit** button to switch to the edit screen.



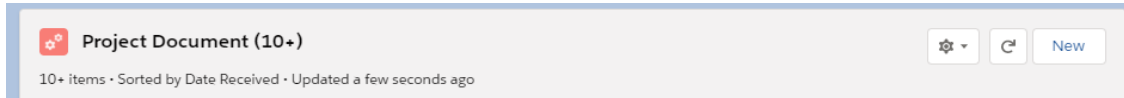
Remember: You can pin the List View you use most often.



Adding Related Records

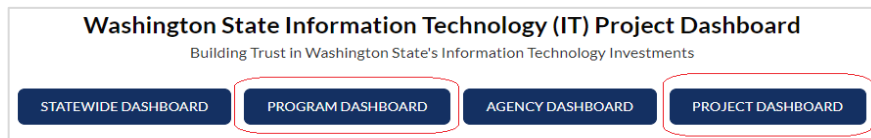
Related records include Project Leadership, Project Documents, OCIO Assessments, QA Assessments and Project Assessments.

1. Navigate to a project. Then on the right side of the project screen, the related lists should be displayed. Click **New** to enter a new record of the desired type.



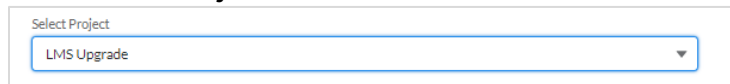
2. Fill out the screen and click save to create the new record.

Remember: The data entered on the project record in Salesforce shows up on the Project dashboard. If entering a program, it will show up on the Program dashboard.



Linking to a Project Webpage

1. To share a direct link to a project dashboard, first navigate to the dashboard: <https://waciportal.force.com/s/>.
2. Click on the **Project Dashboard** and select the desired project from the drop-down menu.



3. Copy the URL from the browser window: <https://waciportal.force.com/s/project-dashboard?Project%20Selector=LMS%20Upgrade>.

This link can be shared as desired.

Exporting Data

From the public facing dashboard:

1. Click on the Excel or PDF icons to get a download of the data that is used to generate the chart or graph.

