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Setting up a Report Viewer portlet

You can create portlets that display a preview of a Practice CS report of your choice on any dashboard. The report preview is displayed within the portlet after you add it to a dashboard.

To set up custom portlets, choose Setup / Custom Portlets.

1. On the Custom Portlets setup screen, click the Add button to add a new portlet.

2. In the **Description** field, enter a name for the portlet. This name will appear in the Select Portlets dialog and in the portlet's title bar.

3. In the **Type** field, select Report Viewer.

4. To create a portlet that can be viewed by all firm employees, verify that the **Allow others to view this portlet** checkbox is marked. If unmarked, only the staff member who creates the portlet will be able to view it.

5. Under Configuration, select the name of the report you want to preview in the portlet.

6. Click Enter to save the portlet.

When you add the report viewer portlet to a dashboard, the report Options screen will open and allow you to specify Selection and Layout options for the report. You can change these at any time by right-clicking the portlet and choosing Options from the context menu.

For more information about Custom Portlets see the Practice CS Help.