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Recommended browsers: Chrome or Firefox

Creating Dashboards Quick Start Guide

Creating Dashboards

Creating a dashboard is simple and allows you to customize the data displayed by placing widgets, charts and tables on the dashboard's 4x9 grid area.

Let's take a look.

Navigating to Dashboards

Step 1 - Hover over “Create” at the top right of the page.

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Report

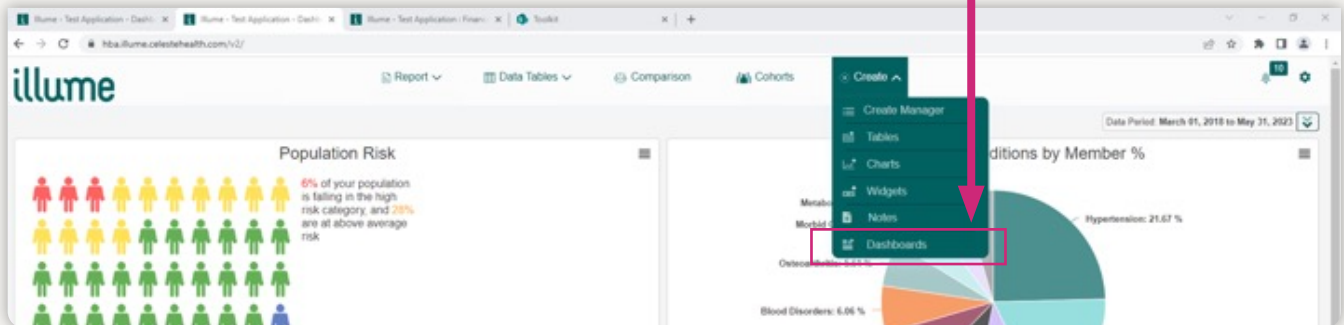
Data Tables

Comparison

Cohorts

Create



Step 2 - A dropdown menu will appear. Select “Dashboards” from the menu.



Create Dashboard Overview

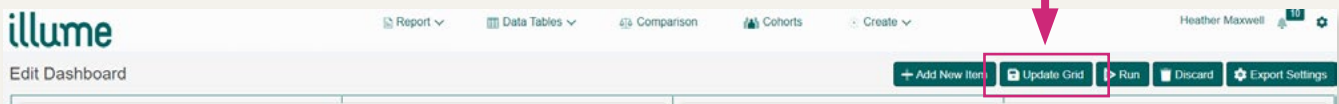
Add new item – Select the type of element you'd like to place on the grid. Elements can be arranged and moved by clicking and dragging. To remove an element, just click the “X” in the upper right corner.



- **Charts** – By default, charts utilize a 2x3 area of the grid. Charts can be expanded to 4x3 by clicking and dragging the  located in the lower right corner of the element.
- **Tables** – Tables occupy a minimum 4x3 space on the grid and can be expanded by utilizing the  located in the lower right corner of the element.
- **Widgets** – Widgets occupy a 1x1 space on the grid.

Save grid – Once you have your information arranged on the grid, you can save the dashboard for future use by giving it a name, description and choosing sharing permissions. Your saved dashboards will appear in “Create Manager.”

Update grid – To make updates to your saved dashboard, click the “Update Grid” button on the “Edit Dashboard” screen. You will be given the option to make updates to the existing grid or make a new one.



Run – Opens a new tab populating the dashboard elements with data provided in the population pop-up. Click the “Place Holder” tab to toggle back to the placement page. A new run is required to reflect any changes made to the Place Holder tab. Close tabs by clicking the “X.”

Discard – Removes all elements from the grid.

User Roles

Report Library Administrator – Controls the functionality for Create Manager. They can view all dashboards regardless of sharing status, make themselves the “owner” of any dashboard, publish any dashboard, manipulate dashboards through sharing, un-sharing, and cloning, and set a dashboard as the default for all users.

Non-Administrators – Can access and edit dashboards that they own. Can view dashboards that have been shared with them.