Create a Dashboard

Objective

To create a dashboard with visuals you've created from custom reports. See Add Visuals to Custom Reports.

Background

Dashboards are created with the data you have reported on and created visuals for with custom reports. These dashboards are accessible from the Reports and Home tool.

These are different from the Standard dashboards that are available to the Admin users. The Standard dashboards are static dashboards specific to each product category.

Things to Consider

- Required User Permission: 'Admin' level permissions on the project's Reports tool.

Steps

1. Navigate to the project's Reports tool.
2. Click the Dashboard tab.
3. Click Create Dashboard.
4. In your visual library, select which visuals you want to add to your dashboard. If you do not have any visuals created yet, see Add Visuals to Custom Reports.
5. You are now in Edit mode, so you can perform the following tasks:
   - Resize the visual.
   - Move the visuals around.
   - Edit the title of the dashboard by clicking into the title name.
6. Click Done to save the visual. You are now in view mode, where you can click into the graphs to be taken to the report.

Next Steps

Share a Dashboard