

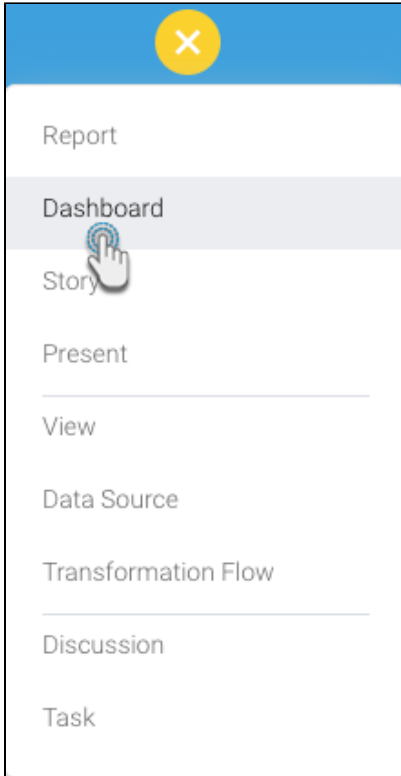
Creating a Dashboard

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How to create a dashboard

A dashboard may consist of one or more tabs. When creating a new dashboard, you will need to start with a new tab.

1. Click on the **Create +** button, and select **Dashboard**.



2. When the following popup appears, select either one of the dashboard layouts or the dashboard canvas (pointed out in the screenshot below).

Create New Dashboard

Dashboard Name

Dashboard Name

Default Data Set (Optional)

Select a view

[Create New View](#)

Choose Layout

This can be changed later

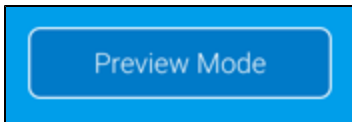
Cancel

Create

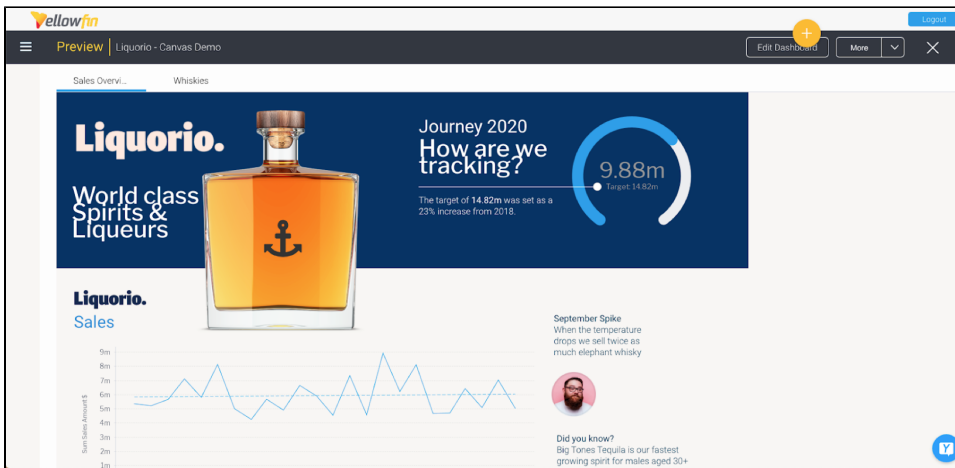
- You may provide a name for the dashboard tab now, or do it later.
- Similarly, you may also select the default view or data set for your dashboard. Or click on the [Create New View](#) option to create a new view; this leads to the View builder.
- Click on the **Create** button to continue.
- The tab layout of your selection will appear in edit mode on dashboard. In our example, we have shown the dashboard canvas.

- You can now create more [sub tabs](#), and add other [dashboard objects](#) to any of the sub tabs via left side widget navigation.
- If you used a canvas template, you can also extend the code of the dashboard, and its objects by going into [Code Mode](#). (Note: you will need the correct role permission for access to this mode.) To do so, click on the **Code** button in the top header.

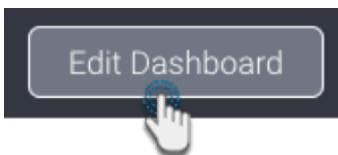
- The dashboard builder autosaves the dashboard as a draft, as you continue to edit it.
- View and test your dashboard in preview mode before publishing and sharing it. Click on the **Preview Mode** button on the top-right corner.



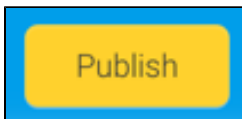
11. You will be able to view your dashboard in preview, as shown in the example below.



12. You can go back to edit mode to make further changes, by clicking on the **Edit Dashboard** button on the top-right corner.



13. Once the dashboard is ready, click on the **Publish** button to publish and share it with other users.



Dashboard properties

Dashboard Properties

Dashboard

Sub Tab

Name

Sales Performance

Default Data Set (Optional)

Search

Filter Properties

Automatic Filter Linking

Filter Reset Control

Left Filters

Global Content Containers

Make Content Sticky

Hide "Favourited by" icons

Note: these property options will differ based on the selected dashboard template; the dashboard layouts will have limited properties options, whereas the canvas will have all.

Property name	Description
Name	This field contains the current name of your dashboard. Click on the field to update the name.
Default Data Set	This optional setting lets you select a default view or data set for your dashboard.
Automatic filter linking	This toggle, which is on by default, lets you automatically link your dashboard filters. Learn more here .
Filter Reset Control	This toggle, disabled by default, can be enabled so that the Reset button in a Filter Widget control panel will reset the entire dashboard to its original state. This will reset all filters and other dashboard interactions, including drill functions, applied by the user.
Left filters	<p>This toggle, disabled by default, can be enabled to hide or display the button for left side navigation filters on your dashboard. When enabled the following toggles become available:</p> <p>Hide Reset Link: Enable to hide the link to reset this panel of filters</p> <p>Hide Control Panel: Enable to hide all the control panels on this panel of filters (Reset link, Apply button and the Refresh Cached Filters icon)</p> <p>Auto run filters: Enable to automatically run reports when filter values are selected or changed, without having to use the Apply button.</p>
Make Content Sticky	<p>This toggle, disabled by default, can be enabled to keep any global content containers (filters, associated reports etc) fixed in position so they're always visible when scrolling through dashboard content — effectively locking the global content container content to the screen. Content is sticky in preview and publish modes, but not in edit mode.</p> <p>Note:</p> <ul style="list-style-type: none"> This option is not available in Internet Explorer (the browser is no longer supported). This option is not supported in full-screen mode. Content containers will display a scrollbar if they contain too much content to display on your screen.

Hide Favourited by icons	This toggle when set on, prevents the display of the user icons for users who have favourited this Dashboard. This is disabled by default, meaning the icons will be displayed.
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