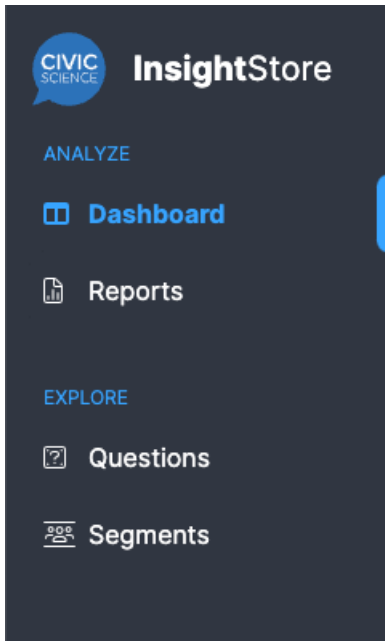


Creating or cloning a dashboard

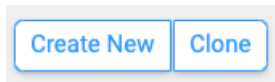
04/12/2024 1:52 pm EDT

There are three ways to create a new dashboard.

Create a Blank Dashboard



To create a blank dashboard, select *Dashboard* from the left navigation bar.



Click the button in the upper right corner labeled *Create New*.

Next is this modal:

A screenshot of a modal window titled 'CREATE NEW DASHBOARD'. The modal has a close button (X) in the top right corner. Below the title is a label 'Dashboard Name *' followed by a text input field. At the bottom right of the modal are two buttons: 'Cancel' and 'Submit'.

Give the dashboard a descriptive name and click *Submit*. (It can be renamed easily later.) After saving the name, the *Basic Information* for the dashboard will be displayed.

BASIC INFORMATION

Dashboard Name

Dashboard Default [?]

 Make this my default dashboard

The dashboard name can be changed on the *Basic Info* tab under *Settings*. The *Sharing* and *Email* tabs are discussed elsewhere.

Any changes you make will take effect after hitting *Submit*. Clicking on *Results* will take you to the main dashboard screen.

The screenshot shows the 'Dashboard' settings page. At the top, there's a title 'Dashboard' and a subtitle 'View grouped questions, results and reports. [Learn more about dashboards.](#)'. To the right are 'Create New' and 'Clone' buttons. Below this is a color selection bar with a dropdown arrow and an 'Export' button. A navigation bar has 'Results' (selected) and 'Settings' (with a gear icon). Underneath is a 'FILTER DASHBOARD' section with a plus icon. A large dashed box contains an 'Add New Dashlet' button.

Create a Dashboard from a Link

The second way to create a dashboard involves finding any of the *+ Add to Dashboard* links scattered throughout the InsightStore. I've selected one at the bottom left corner of a question.

[+ Add to Dashboard](#)

Clicking that link results in this modal:

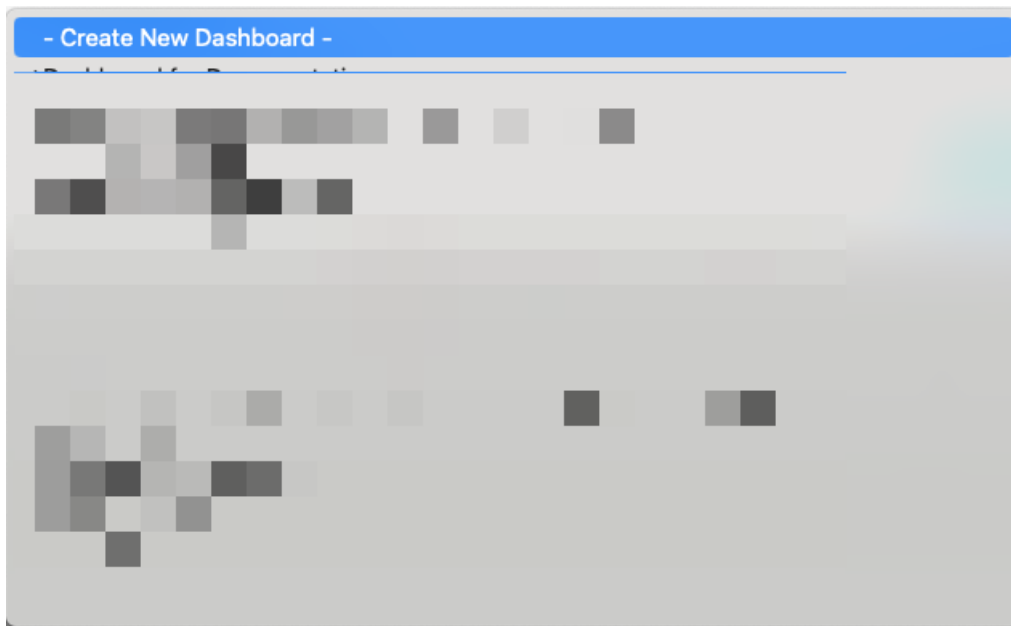
TO WHICH DASHBOARD WOULD YOU LIKE TO ADD THIS DASHLET? ✕

This dashlet can be added to any dashboards that you can edit. Added dashlets will automatically appear in the bottom left column of the dashboard to which they are added, and can be rearranged through drag and drop.

Select a dashboard

Submit

Clicking on the dropdown list, the first option is - *Create New Dashboard* - .



Selecting that option adds a new field to the modal where I can enter a name for the new dashboard.

TO WHICH DASHBOARD WOULD YOU LIKE TO ADD THIS DASHLET? ✕

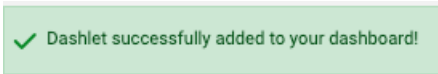
This dashlet can be added to any dashboards that you can edit. Added dashlets will automatically appear in the bottom left column of the dashboard to which they are added, and can be rearranged through drag and drop.

Select a dashboard

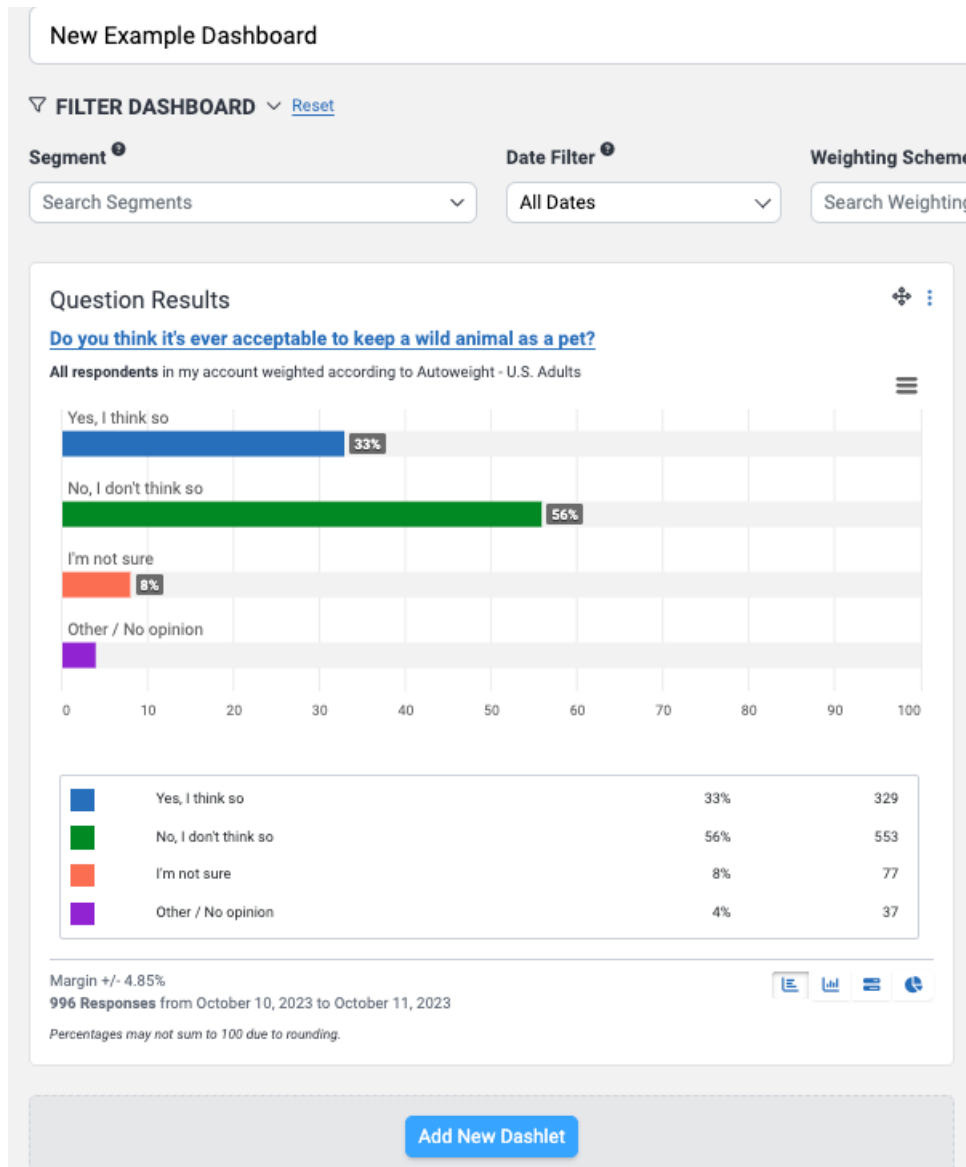
Dashboard Name *

Submit

After entering the new name, I click *Submit* to create the new dashboard. A green area appears above the question data with the message *Dashlet successfully added to your dashboard!*



When I click on the list of dashboards at the top of the dashboard page again, I see my new dashboard listed. It contains a question results dashlet for the question I chose.



Cloning a Dashboard

The third way to create a new dashboard is by cloning an existing one. Cloning allows you to make a complete copy of a dashboard and then make changes that won't affect the original.

Select a dashboard from the list and click the *Clone* button in the upper right corner to clone a dashboard.



Video on Dashboard Creation

Here's a video on creating a dashboard and adding dashlets.
Your browser does not support the video tag.
