Creating a New Dashboard

This guide will cover:

- How to create a dashboard for the purpose holding and displaying multiple analyses and objects
- Understanding dashboard objects
- Adding content to a new dashboard

**Step One**

To create a new dashboard, click or hover over the **New** icon in the Global Header and select **Dashboard**.

**Step Two**

In the New Dashboard window:

- Provide a name
- Identify a location
  - Click the location drop-down and select **Browse**
  - Identify the folder location
- Click the **OK** button to continue.

**IMPORTANT**: If you intend to share this dashboard, the dashboard and ALL objects on the dashboard must be saved within your assigned **Shared Side CaRT** folder. Please review the **Understanding Shared Folders and How to Share Dashboards and Analyses** documentation if necessary.
Dashboard Editor

Dashboard Object (used to customize the layout of a dashboard page)

Catalog items stored in the CaRT Web Catalog repository.
Step Three

Add objects to the dashboard by click and dragging into the content area section. Each object that is added will have its own set of properties and options available. You will notice a yellow highlight outlining the object that is being updated.

Column of the dashboard page layout. Pages are laid out in a grid format represented by columns and incrementally identified.

A page column can have one or more sections which hold content such as an analysis, text, or one of the other dashboard objects.

Content added is identified by an icon and by name or description.

Once you add an analysis from the catalog pane, it will housed on the dashboard page within a column and a section. It will default to display the entire compound view of that analysis. For instance, if the analysis contains a title view, table view and pivot table view, all three will display on the dashboard.
Step Four

To select an individual view, hover over the object to expose the object toolbar and click on the Properties icon, hover over the Show View option then select from any of the available views.

In order for a view to be displayed on a dashboard, it must be added in the analysis first. [Reference the Adding New Views document]

Step Five

Once your dashboard has been configured, click Save.
Step Six

Use the **Preview** button to see how your dashboard will display when ran. Or click the **Run** button when ready to run the dashboard from when it was last saved.

Use the Page Options menu in the upper right corner of the screen to perform various actions including editing the dashboard, exporting, and printing.

You have now completed the steps for creating and configuring a new dashboard.