Video Tutorial: Dashboards

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Key points from the video

Context

Dashboards are a powerful tool for visualizing progress and communicating about your work. Each user can create or view their own set of dashboards.

Create new dashboard [0:23]

- Click on the "plus" sign to the right of any existing dashboards.
- Give the dashboard a name and click "add". The new dashboard is created as a blank tab.
- To build your dashboard, click on "add tile" at the bottom of the page.
- Select a tile type and fill out the required details, then click "ok". A tile can be resized or moved by dragging and dropping.
- Repeat until you have your desired set of tiles.
- Click on any tile's gear icon to edit additional configuration options for that tile.

Add someone else's dashboard to your set of dashboards [2:58]

- Click on the "plus" sign to the right of any existing dashboards.
- Select the "add existing dashboard" tab. Select the dashboard(s) to include on your page.
- Choose "add as a copy" if you'd like to develop your own dashboards using someone else's as a starting point. This creates new dashboards that you can rename, edit, and share.
- Choose "add" to view read-only versions of an existing dashboard.

Push dashboards to other users [3:37]

- Owners can push shared dashboards to other users.
- Click on "manage dashboards" at the top. Select the shared dashboard you'd like to push to other users.
- Click on "push" and select the users who should receive the dashboard.
- You can choose to put the dashboard before existing dashboards so that it's the first thing the user sees when they log in.
- Then click on "push".

If you have any questions about any of this, please check out our knowledge base articles about dashboards.

Having trouble? See Video Tutorial Tips for tips on viewing our video tutorials.

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