

Dashboards: Create, Copy, or Edit

Last updated by | David Mishler Gomocho | May 2, 2025 at 11:52 AM GMT+2

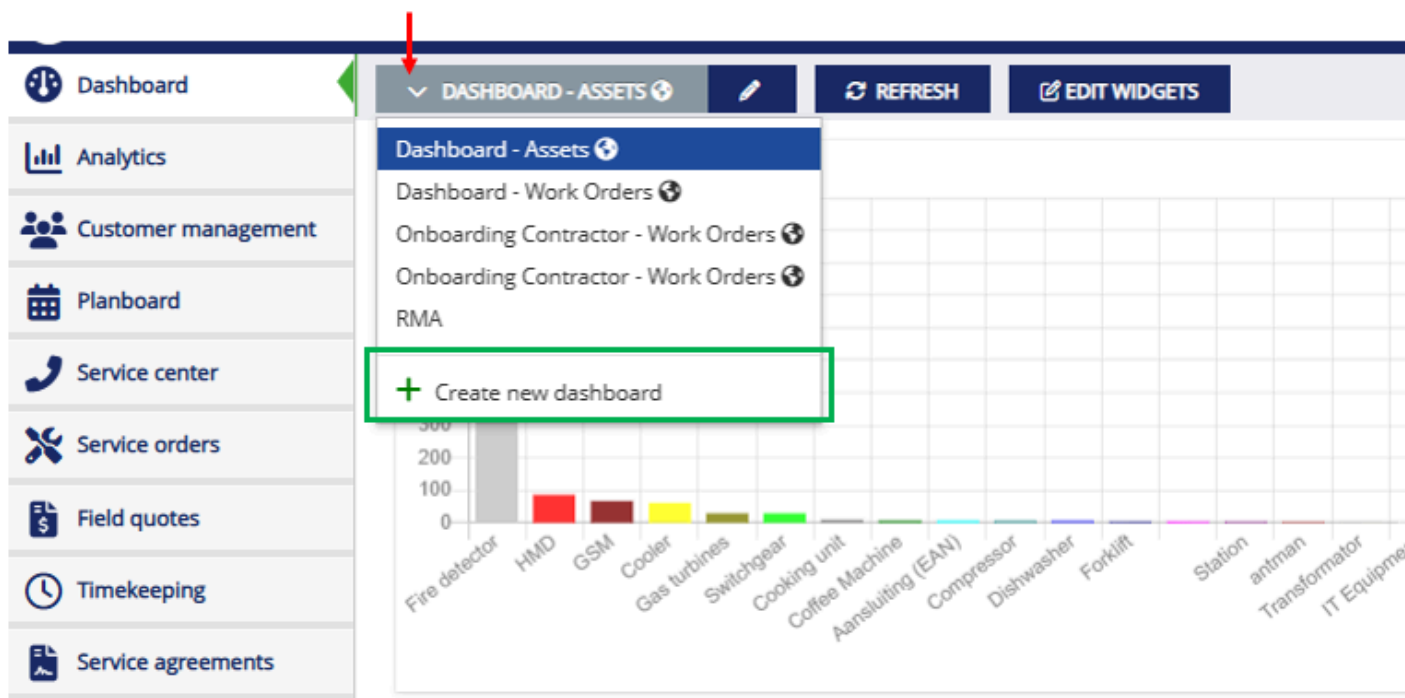


Create, Edit, or Copy Dashboards

Create a New Dashboard

Go to Dashboard

- From the **Portal Menu**, select **Dashboard**.
- Open the **Available Dashboards** dropdown and click + **Create New Dashboard**.



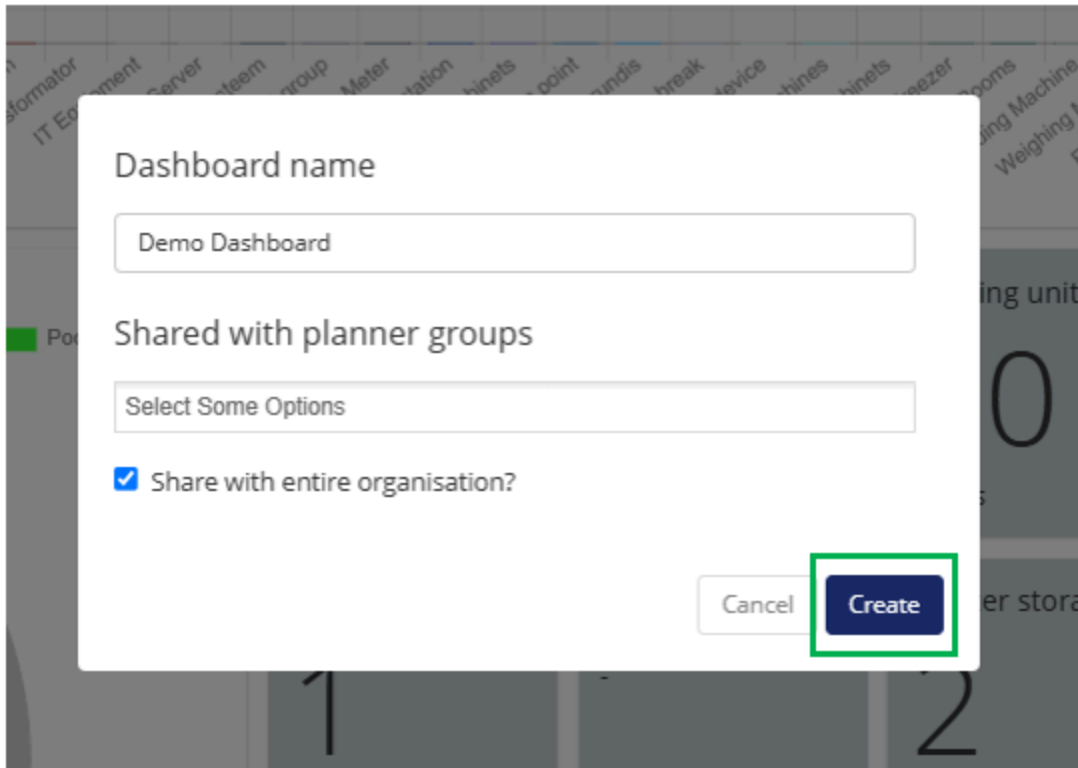
Enter Dashboard Details

- In the pop-up, fill in the following fields:
 - **Dashboard Name:** Provide a clear and descriptive name for your dashboard.
 - **Shared with Planner Groups** (*optional*): Select planner groups to share the dashboard with, if applicable.
 - **Share with the Entire Organization:**
 - To make the dashboard visible to everyone in the organization, check this box.

- Leave it unchecked if you prefer to restrict visibility.

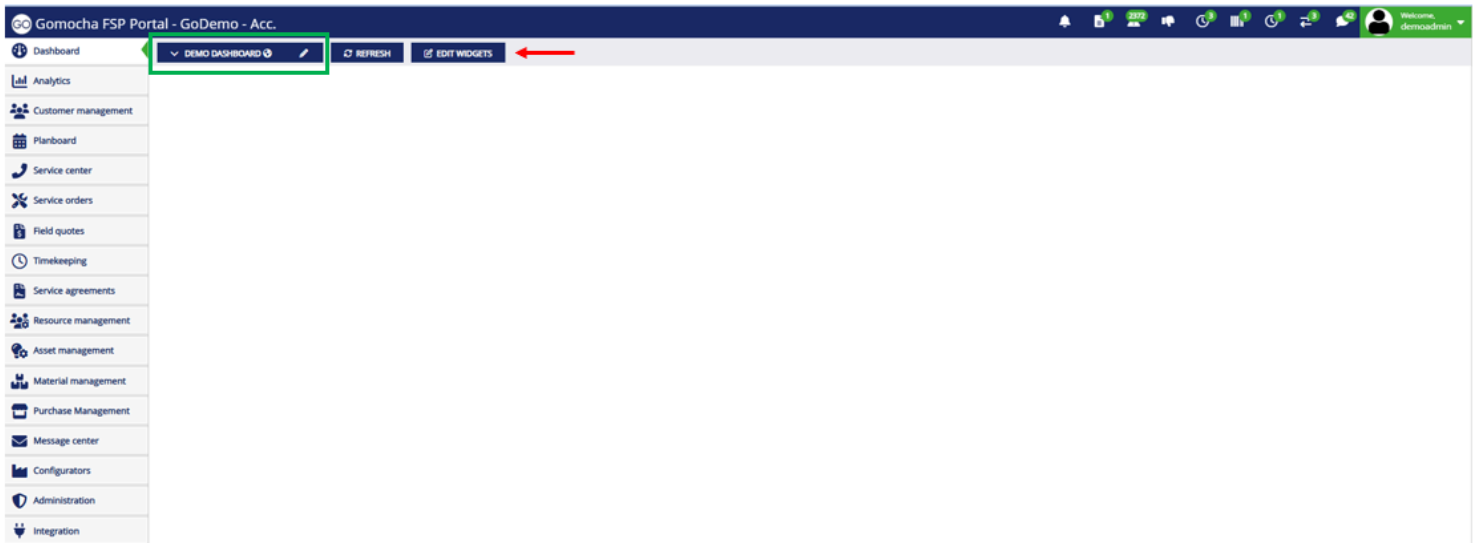
Create the Dashboard

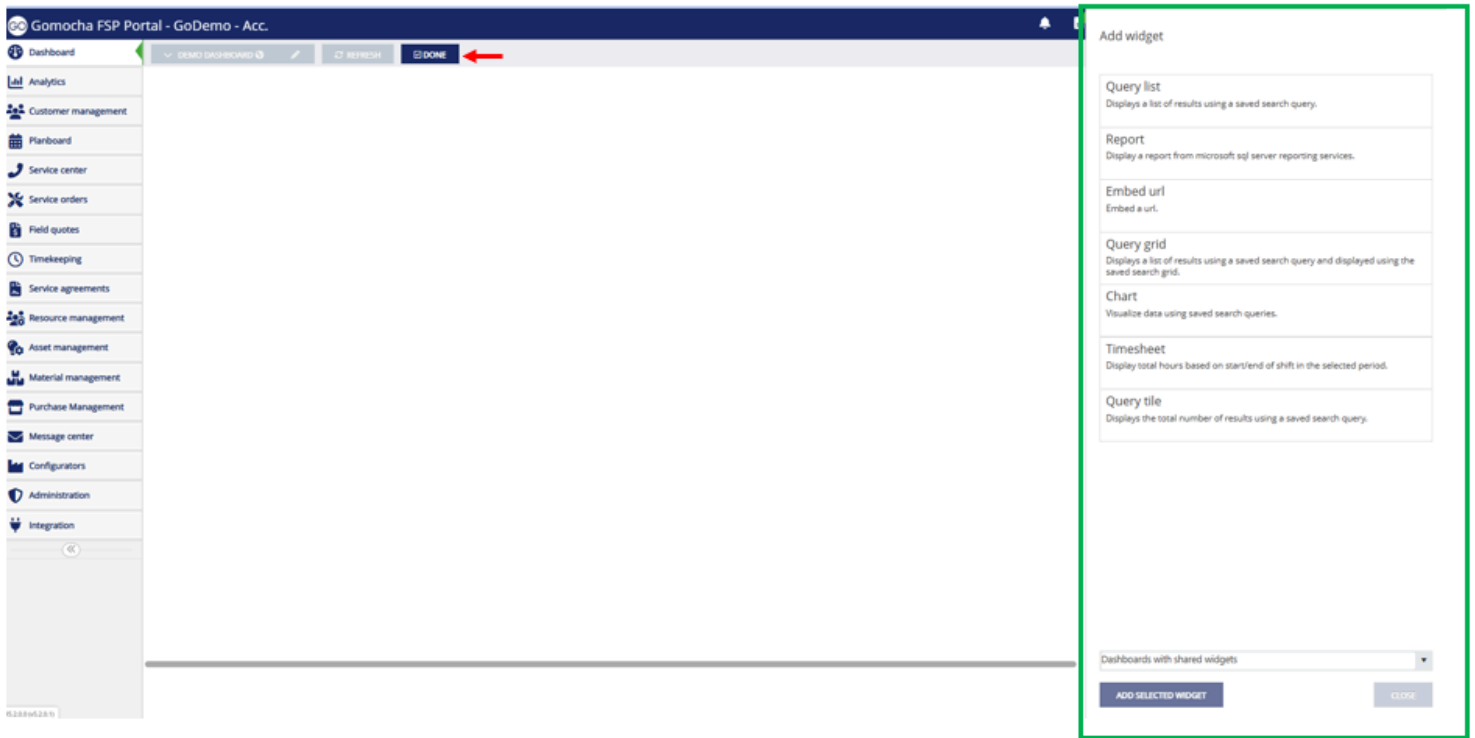
- Click **Create** to save and generate your new dashboard.



Next Steps

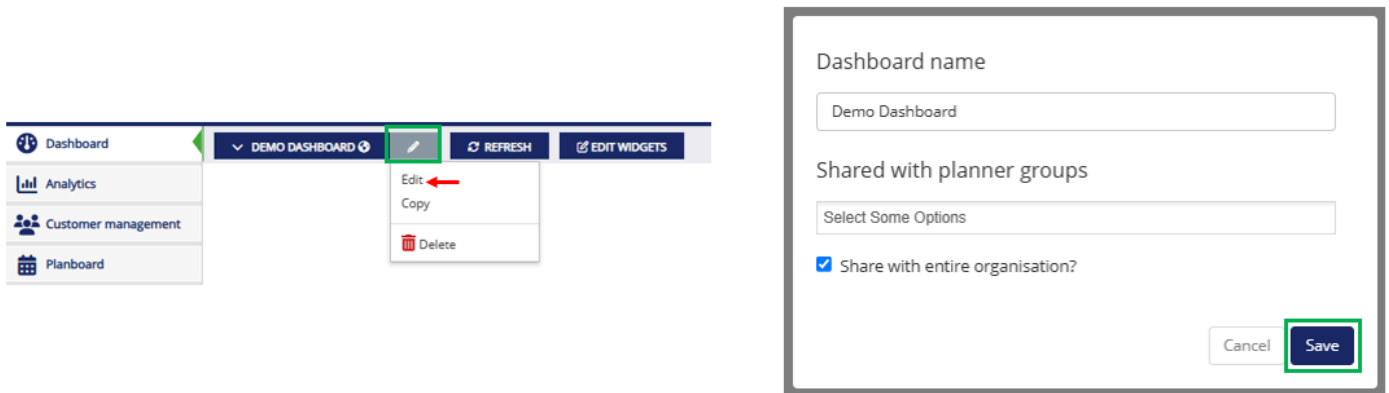
- The new, blank dashboard will now appear in the **Available Dashboards** dropdown.
- To begin adding widgets, click the **Edit Widgets** button.





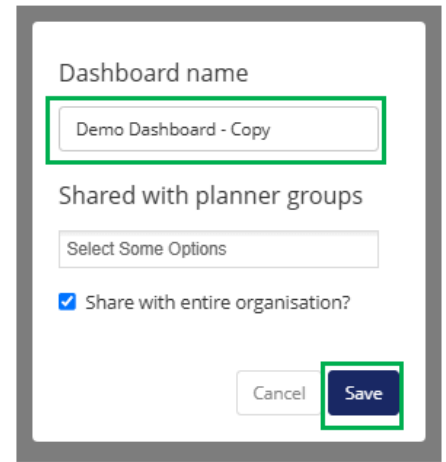
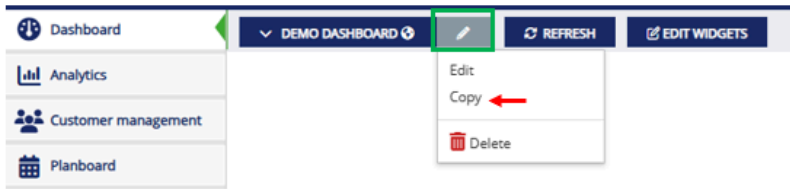
Edit Existing Dashboard

- Click the **Edit** icon (pencil) next to the **Dashboard** dropdown.
- Update the **Dashboard Details** as needed, then click **Save** to apply changes.



Copy Existing Dashboard

- Dashboards can be copied for organization efficiency
- Click the **Edit** icon (pencil) next to the **Dashboard** dropdown.
- Update the **Dashboard Details** if needed, then click **Save**.
- A copy of the dashboard is created, including all widgets.



Deleting Dashboards

- Deleted dashboards and their widgets **cannot be recovered**.
- Dashboards **shared with the organization must be unshared** before they can be deleted.

