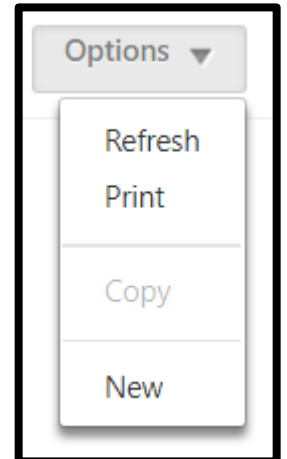## *Use a Dashboard*

Dashboards are a chart that you can use to quickly track training activity and information.

1. Open the **Reports** tab in the menu bar and select **Dashboards** from the dropdown menu.
2. Select which report you want to open from the list on the left.
3. The Dashboard will visualize data from a report in the Dashboards Viewing Pane.
4. Depending on your user privileges, various **Options** may be available to you from the Options dropdown.

- **Refresh** – You will want to refresh the dashboard before you begin reading it to obtain the most recent data. Select this link to refresh the data in the currently open dashboard. For dashboards with multiple reports, this refreshes the data in each report. If the dashboard fails to refresh, the word "Error" appears in the bottom-left corner of the dashboard.
- **Print** - Select this link to print the dashboard. The dashboard chart prints the information visible on the page. The print option uses the print functionality that is built into your web browser, so you may need to alter your browser's print set-up options to successfully print the data and images.

> 💡 You may want to consider using a screen capture tool to make an image of your dashboard. You will have more control over the exact visualization you want to use, without noticeable loss in quality.

> 💡 You may also be able to **Export to Excel** to create a high-quality visualization of the data. Hover over the dashboard to reveal the **Expand** button ▼, select and investigate the dropdown menu.
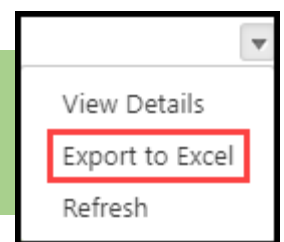
- **Edit** - Select this link to change the title, description, or affect the widgets associated with the dashboard.
- **Copy** - Select this link to make a duplicate of the dashboard.
- **Delete** - Select this link to open a delete confirmation prompt. The Delete option is only available for the dashboard owner, provided the owner has permission to create dashboards.
- **New** - Select this link to create a new dashboard. This option is only available for users with permission to create dashboards.
- **Share** - Select this link to share the dashboard. Only the owner of the dashboard may share the report with others. The users with whom it has been shared cannot then share

Use a Dashboard

it with others. The shared users must have permission to view dashboards and to view the standard or custom report that is part of the dashboard.

1. Filter by organizational unit criteria from the **Share With** dropdown menu.
2. Select the **New Window** button 🗗 that is then available beside the dropdown.
3. Use the Search input fields to filter the results and press the **Search** button.
4. Press the **Add** button ✛ before the name of any user or group with whom you want to share the dashboard.
5. Press **Done.**
6. Verify the names in the list below the Share With dropdown. You can use the **Remove** button 🗑 to remove names. You can use the blue, **Include Subordinates** checkbox to share with every employee managed by that user.

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