

Dashboards

Creating, arranging, and interacting with dashboards. The primary customer surface.

- [How do I create a dashboard?](#)
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How do I create a dashboard?

Overview

A **dashboard** in Vantage is a single-screen view that brings together multiple visual widgets — charts, KPI cards, tables, maps, and more — so you can monitor your data at a glance. Each dashboard uses a **12-column reflowing grid**, which means widgets automatically adjust their positions based on screen size while staying neatly aligned.

Creating a dashboard is the first step before you can add widgets, apply filters, set themes, or share insights with your team.

When to Use

Create a new dashboard when you need to:

- **Visualise form data** — Turn field submissions, survey responses, or inspection records into charts, KPIs, and tables.
- **Track performance at a glance** — Build a single view with key metrics (completion rates, scores, counts) that updates as new data arrives.
- **Prepare a view for sharing** — Set up a dashboard that you will later share with specific viewers, teams, or external partners via links or scheduled emails.
- **Organise widgets by topic** — Group related visuals (e.g., all store-audit charts on one board, all training-completion metrics on another) so viewers find what they need in one place.

Concepts

Dashboard – A named board that holds one or more widgets. Each dashboard has its own URL, theme, and filter bar.

Widget – A single visual element on a dashboard such as a chart, KPI card, table, map, or title block. You add widgets after creating the dashboard.

12-Column Grid – The layout system dashboards use. The screen is divided into 12 equal columns and every widget spans one or more columns. Widgets reflow on smaller screens but stay aligned

to the grid.

Layout Auto-Save – Any change you make to widget position or size is saved to the server automatically. No Save button needed.

Data Source – The underlying data set (forms, Excel uploads, API imports, or blended sources) that widgets query. You must have at least one data source before a dashboard can show meaningful data.

Vantage Admin – The role required to create, edit, and manage dashboards. Viewers (non-admin users) can see shared dashboards but cannot create or modify them.

Set Up Guide

From the Home Page, click the **Vantage Dashboard** widget to open Vantage. If you have not added this widget yet, follow the [Custom Widget help doc](#) to set it up.

Step 1 — Open the Dashboard list

Click the **Vantage Dashboard** widget on your Home Page. You will land on the Dashboards screen, which lists all dashboards you have access to.

Step 2 — Start a new dashboard

Click the + **Create Dashboard** button (top-right corner of the Dashboards screen).

Step 3 — Name the dashboard

Enter a clear, descriptive name for the dashboard (e.g., "Store Audit — Weekly Summary" or "Training Completion Tracker"). The name appears in the dashboard list and in shared links, so choose something your viewers will recognise.

Step 4 — Select a data source

Choose the primary data source the dashboard will query. You can pick from your available sources (forms, Excel uploads, API imports, or blended sources). You can always add widgets that use different data sources later.

Step 5 — Save and open the dashboard

Click **Save** (or **Create**). The dashboard opens in the builder view — an empty 12-column grid ready for you to add widgets.

From here you can:

- Add widgets (charts, KPIs, tables, maps) — see *How do I add a widget to a dashboard?*
- Arrange and resize widgets on the grid — see *How do I arrange and resize widgets?*
- Apply filters and themes — see the respective help pages in this book.

User View

Once a dashboard is created, it appears in the **Dashboards** list. Any user with viewer access will see the dashboard name and can click to open it.

- **Admin users** see the builder grid with drag-and-drop controls, the option to add or configure widgets, and all editing tools.
- **Viewer users** see the dashboard in read-only mode — they can interact with filters, drill through widget data, and export views, but they cannot add, move, or delete widgets.

If no widgets have been added yet, viewers will see an empty dashboard with a message indicating that content is being prepared.

Best Practices

Keep each dashboard focused on a single topic (e.g., one for store audits, another for training) Use descriptive names that include the topic and scope (e.g., "Region North – Weekly Inspections") Make sure the data source is connected and syncing before creating the dashboard Plan your layout before adding widgets – KPI cards at the top, detail charts below works well Use Title Block widgets to label groups of related widgets on the same dashboard Preview the dashboard as a viewer before sharing

Related Links / FAQs

FAQs

Can a viewer create a dashboard?

No. Only users with the Vantage Admin role can create and edit dashboards. Viewers can open, filter, and drill through shared dashboards.

Can I delete a dashboard?

Yes. Open the dashboard, click the options menu (:), and select Delete. This action cannot be undone — all widgets on that dashboard will be removed.

Is there a limit to how many dashboards I can create?

There is no hard limit. However, each dashboard queries its data sources on load, so keeping dashboards focused helps performance.

Version Notes

Last Updated: Oct 2026

How do I add a widget to a dashboard?

Overview

Widgets are the building blocks of a Vantage dashboard. Each widget displays your data in a specific format — a bar chart, a KPI card, a summary table, a map, and so on. You add widgets one at a time to a dashboard and configure each one with its own data source, columns, filters, and display settings.

When to Use

Add a widget to a dashboard when you need to:

Display a metric or KPI (e.g., total submissions, average score, completion rate) Show trends over time using a line or bar chart Break down data by category with a donut, pie, or stacked bar chart List detailed records in a summary table or pivot table Plot data on a geographic map Highlight events on a calendar view Add a heading or label to a section of the dashboard using a title block

Concepts

Widget – A single visual element placed on a dashboard. Each widget has its own configuration (data source, columns, filters, chart type).

Widget Type – The format used to display data. Available types include KPI Card, Bar Chart, Line Chart, Donut Chart, Pie Chart, Combo Chart, Stacked Bar (100%), Geo Map, Calendar, Summary Table, Pivot Table, AI Summary, Media Analysis, and Title Block.

Data Source – The data set a widget queries. A single dashboard can hold widgets pointing to different data sources.

Widget Filters – Conditions applied within a widget to narrow the data it displays (separate from the dashboard-level global filter bar).

View Data – A feature that lets you see the raw rows behind a widget's visual. Available from the widget options menu.

Set Up Guide

Once you have created a dashboard (see *How do I create a dashboard?*), follow these steps to add your first widget.

Step 1: Open your dashboard

1. From the Dashboards list, click the dashboard you created
2. The dashboard opens in the builder view with an empty grid

Step 2: Add a new widget

1. Click the **+ Add Widget** button
2. Select a widget type (e.g., Bar Chart, KPI Card, Summary Table)
3. Choose the data source the widget should query

Step 3: Configure the widget

1. Select the columns to display (measures, dimensions, or grouping fields depending on the widget type)
2. Set any widget-level filters to narrow the data
3. Configure display options such as title, colour, sort order, and number format
4. Preview the widget to verify it shows the expected data

Step 4: Save the widget

1. Click **Save**
2. The widget appears on the dashboard grid
3. You can drag it to reposition or resize it on the 12-column grid (see *How do I arrange and resize widgets?*)

User View

Learner (non-admin users) see widgets in read-only mode on shared dashboards.

They can interact with the global filter bar to narrow data across all widgets They can hover over chart elements to see values They can use View Data to see the raw rows behind a widget They can drill through from widget cells to underlying records (see *How do I drill through from a widget to raw rows?*) They cannot add, edit, or delete widgets

Best Practices

Start with KPI cards at the top to give viewers a quick summary before the detailed charts Use descriptive widget titles so viewers know what each chart shows without guessing Keep one widget per question — avoid cramming multiple metrics into a single chart Apply widget-level filters only when you need a subset that differs from the dashboard's global filters Preview before saving to catch unexpected data or layout issues Use Title Block widgets to visually separate groups of related widgets

Related Links / FAQs

Related Links

How do I create a dashboard?

How do I arrange and resize widgets?

How do I apply filters to a dashboard?

How do I apply a theme to a dashboard?

How do I drill through from a widget to raw rows?

FAQs

Can I add widgets from different data sources to the same dashboard?

Yes. Each widget is configured independently and can point to any available data source.

Can I duplicate a widget?

Yes. Use the widget options menu to clone an existing widget. The copy appears on the same dashboard with the same configuration.

What happens if my data source has no data yet?

The widget will render with an empty state. Once data arrives and syncs, the widget updates on the next load or filter change.

How many widgets can I add to one dashboard?

There is no fixed limit, but adding too many widgets increases load time. Keep dashboards focused for the best experience.

Version Notes

Last Updated: Oct 2026

How do I arrange and resize widgets?

1. Overview

After adding widgets to a dashboard, you can arrange them in the order you want and resize them to fit your layout. Vantage uses a 12-column grid, so widgets snap into position and adjust automatically across screen sizes. Your layout is saved automatically — no need to click a Save button.

2. When to Use

- You want to change the order of widgets on a dashboard
- You want to make a widget wider or narrower
- You want to make a widget taller or shorter
- You want to organize your dashboard layout before sharing it with learners

3. Concepts

12-Column Grid – The dashboard is divided into 12 equal columns. Every widget occupies one or more of these columns. This ensures widgets align neatly and reflow on different screen sizes.

Widget Span – The number of columns a widget covers. A widget can span from 1 column (narrow) up to 12 columns (full width).

Drag and Drop – Click and hold a widget, then drag it to a new position on the grid. A dashed outline shows where the widget will land.

Resize Handle – The corner or edge of a widget that you drag to make it wider, narrower, taller, or shorter.

Auto-Save – Every time you move or resize a widget, the layout is saved automatically to the server. You do not need to click Save.

4. Set Up Guide

Once you have a dashboard with widgets (see [How do I create a dashboard?](#) and [How do I add a widget to a dashboard?](#)), follow these steps to arrange and resize them.

Arrange Widgets

1. Open Vantage from the Vantage Dashboard widget on the Home Page
2. Open the dashboard you want to edit
3. Click and hold on the widget you want to move
4. Drag it to the new position — a dashed outline shows where it will land
5. Release to drop the widget in place
6. The layout is saved automatically

Resize Widgets

1. Hover over the widget you want to resize
2. Drag the corner or edge handle to change the size
3. To make a widget wider or narrower, drag the left or right edge
4. To make a widget taller or shorter, drag the top or bottom edge
5. The widget snaps to the nearest grid position
6. The layout is saved automatically

5. User View

Learners who access a shared dashboard see the widgets in the exact layout the admin has arranged. Learners cannot move or resize widgets — the layout is view-only for them.

What learners see: Widgets displayed in the order and size set by the admin
The layout adjusts to fit their screen size
All widget data and filters work as configured

6. Best Practices

Place the most important widgets at the top of the dashboard
Use full-width (12 columns) for large charts or tables
Use half-width (6 columns) to place two widgets side by side
Keep KPI cards narrow (3 or 4 columns) so several fit in one row
Arrange your layout before sharing the dashboard with learners
Resize widgets to avoid unnecessary empty space on the grid

7. Related Links

[How do I create a dashboard?](#) [How do I add a widget to a dashboard?](#)

[FAQs](#)

Can I undo a move or resize? There is no undo button. Simply drag the widget back to its previous position or resize it again.

Do I need to save the layout after making changes? No. The layout is saved automatically every time you move or resize a widget.

Will learners see the same layout I set? Yes. Learners see the exact arrangement and sizes you have configured. They cannot rearrange or resize widgets.

What happens if I leave a gap between widgets? Gaps are preserved. Widgets stay where you drop them and do not shift up automatically to fill empty space.

8. Version Notes

Last Updated: Oct 2026

How do I apply filters to a dashboard?

1. Overview

Filters let you narrow the data shown on a dashboard without changing the widgets themselves. You can filter by any field available in your data source — for example, by date, region, status, or user. Filters apply across all widgets on the dashboard at once, so every chart and table updates together.

2. When to Use

- You want to see data for a specific date range
- You want to view results for a particular region, team, or user
- You want to compare data by filtering on different values
- You want to set default filters so learners see relevant data when they open the dashboard

3. Concepts

Global Filter Bar – The filter strip at the top of a dashboard. Any filter you select here applies to all widgets on the dashboard at once.

Filter Field – A column from your data source that you can filter on, such as Region, Status, or Submission Date.

Applicable Values – The list of actual values available for a filter field. Only values that exist in your data are shown, so you always pick from real options.

Date Presets – Quick date range options such as Today, Yesterday, Last 7 Days, Last 30 Days, and Custom Range. These save time when filtering by date.

Per-Widget Filter – A filter set on an individual widget during widget configuration. It applies only to that widget, not the entire dashboard.

Filter Default – A pre-selected filter value that the admin sets for learners. When a learner opens the dashboard, this value is already applied.

4. Set Up Guide

Open Vantage from the Vantage Dashboard widget on the Home Page and open the dashboard you want to filter.

Apply a Global Filter

1. Click on the filter bar at the top of the dashboard
2. Select the field you want to filter by (for example, Region or Status)
3. Choose one or more values from the list of applicable values
4. The filter is applied immediately — all widgets on the dashboard update to show only the matching data
5. To add more filters, repeat the steps for another field
6. To clear a filter, click the X on the filter chip

Apply a Date Filter

1. Click on the date field in the filter bar
2. Choose a preset such as Today, Yesterday, Last 7 Days, or Last 30 Days
3. Or select Custom Range and pick a start and end date
4. All widgets update to show data for the selected date range

Set a Per-Widget Filter

1. Open the widget configuration (click the edit icon on the widget)
2. Go to the Filters section
3. Select the field and values you want to filter on
4. This filter applies only to that widget, not to the rest of the dashboard
5. Save the widget configuration

5. User View

Learners who access a shared dashboard can use the global filter bar to narrow the data they see. They can select values from the available filter fields and use date presets.

What learners see: The global filter bar at the top of the dashboard with available filter fields Only applicable values for each field (values that exist in their data) Date presets such as Today, Yesterday, Last 7 Days, and Last 30 Days Filter chips showing which filters are currently active If the admin has set filter defaults, those values are pre-selected when the learner opens the dashboard

6. Best Practices

Use date presets for quick filtering instead of picking dates manually each time Set filter defaults for learners so they see the most relevant data on first open Use global filters when you want all widgets to reflect the same criteria Use per-widget filters only when a specific widget needs a different scope from the rest Clear unused filters to avoid seeing empty or unexpected results

7. Related Links

How do I create a dashboard? How do I add a widget to a dashboard? How do I arrange and resize widgets?

FAQs

Do filters change the actual data?

No. Filters only change what is displayed on the dashboard. Your data remains unchanged.

Can I apply multiple filters at the same time?

Yes. You can select values across multiple fields. All filters are applied together, so the dashboard shows only the data that matches all selected filters.

Do learners see the same filters I set?

Learners see the global filter bar and can choose their own values. If you set filter defaults, those values are pre-selected for learners when they first open the dashboard.

What is the difference between a global filter and a per-widget filter?

A global filter applies to all widgets on the dashboard. A per-widget filter applies only to the widget it is configured on.

8. Version Notes

Last Updated: Oct 2026

How do I apply a theme to a dashboard?

1. Overview

Themes let you change the visual appearance of a dashboard and its widgets. You can apply a card theme to control widget colours and styling, and a chrome theme to change the overall dashboard look. The theme you set is saved on the dashboard and is visible to learners, shared links, and scheduled emails.

2. When to Use

- You want to give your dashboard a consistent visual style
- You want widgets to match your brand or team colours
- You are sharing a dashboard and want it to look polished for learners
- You are sending scheduled dashboard emails and want the theme to carry through

3. Concepts

Card Theme – Controls the colours and styling of individual widget cards on the dashboard, such as background colour, text colour, and borders.

Chrome Theme – Controls the overall dashboard appearance, including the header, sidebar, and background surrounding the widgets.

Theme Persistence – The theme is saved on the dashboard itself (not in your browser). Once you apply a theme, it stays the same for everyone who views the dashboard.

4. Set Up Guide

Open Vantage from the Vantage Dashboard widget on the Home Page and open the dashboard you want to style.

[Apply a Card Theme](#)

1. Click on the theme or settings option in the dashboard toolbar
2. Browse the available card themes
3. Select a card theme to preview it on your widgets
4. The theme is applied to all widget cards on the dashboard
5. The theme is saved automatically

Apply a Chrome Theme

1. In the same theme settings area, look for the chrome theme options
2. Select a chrome theme to change the dashboard header, sidebar, and background
3. The theme is applied immediately and saved automatically

5. User View

Learners who access a shared dashboard see the theme exactly as the admin has set it. The card theme and chrome theme are both visible to learners, on shared links, and in scheduled dashboard emails.

What learners see: Widget cards styled with the admin's chosen card theme Dashboard header and background styled with the chrome theme The same theme in scheduled email reports (widget images and PDF attachments reflect the theme)

6. Best Practices

Choose a theme that matches your organization's brand colours Apply the theme before sharing the dashboard so learners see a polished view Use a consistent theme across dashboards that are shared with the same audience Preview the theme on all widget types to make sure charts and tables look clear

7. Related Links

How do I create a dashboard? How do I add a widget to a dashboard? How do I arrange and resize widgets? How do I apply filters to a dashboard?

FAQs

Does the theme apply to shared links and emails?

Yes. The theme is saved on the dashboard, so learners, shared links, and scheduled dashboard emails all reflect the same theme.

Can learners change the theme?

No. Only admins can apply or change a theme. Learners see the theme the admin has set.

Is the theme saved in my browser?

No. The theme is saved on the dashboard itself on the server. It is not stored in your browser, so it looks the same on any device.

8. Version Notes

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