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.

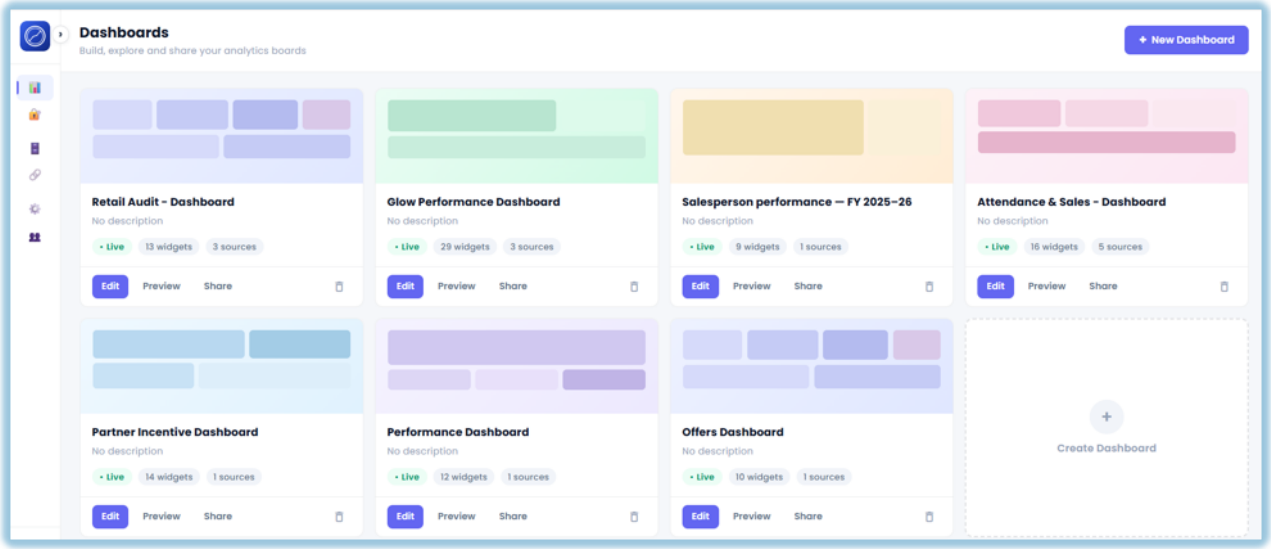
Data Source – The underlying data set (forms, Excel uploads, API imports, or blended sources) that widgets query. You must have at least one data source before a dashboard can show meaningful data.

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.

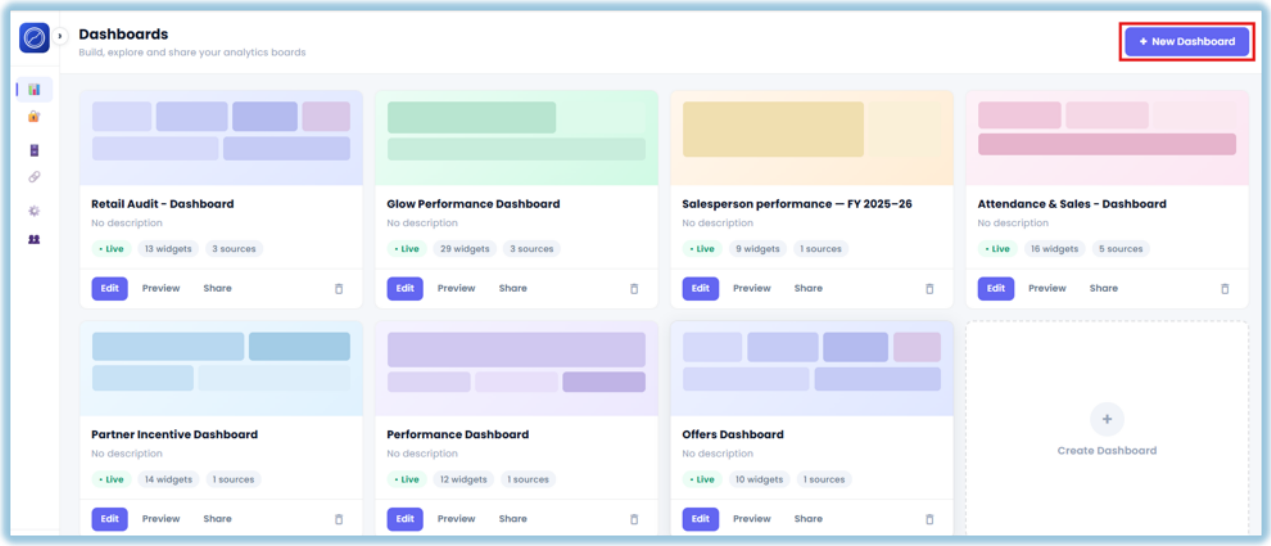
Set Up Guide

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.

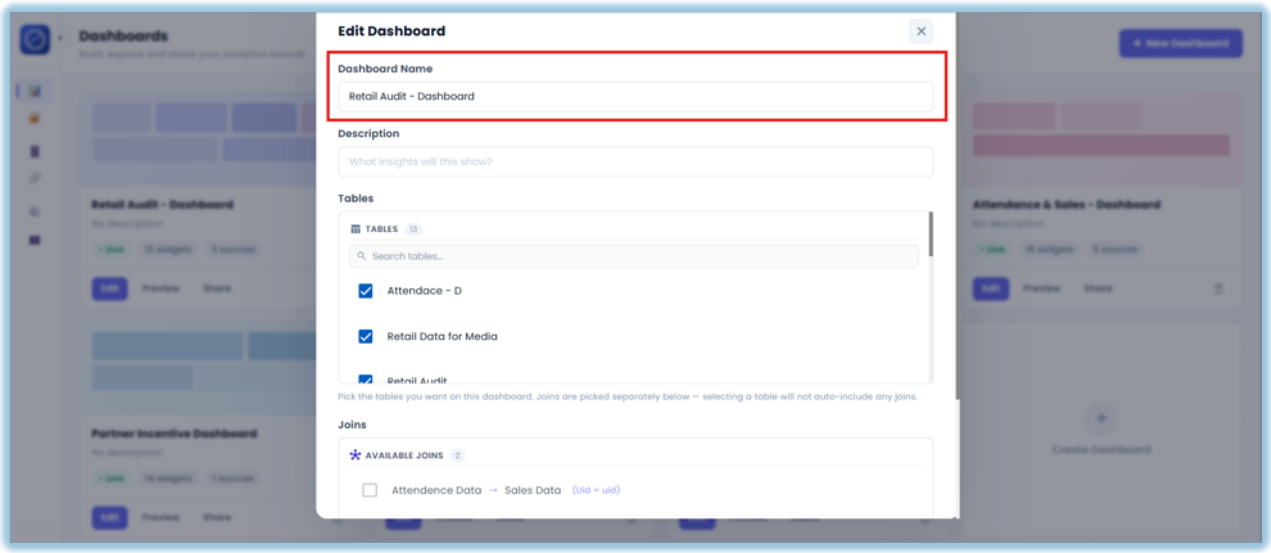
1. **Open the Dashboard list** — Click the **Vantage Dashboard** widget on your Home Page. You will land on the Dashboards screen, which lists all dashboards you have access to.



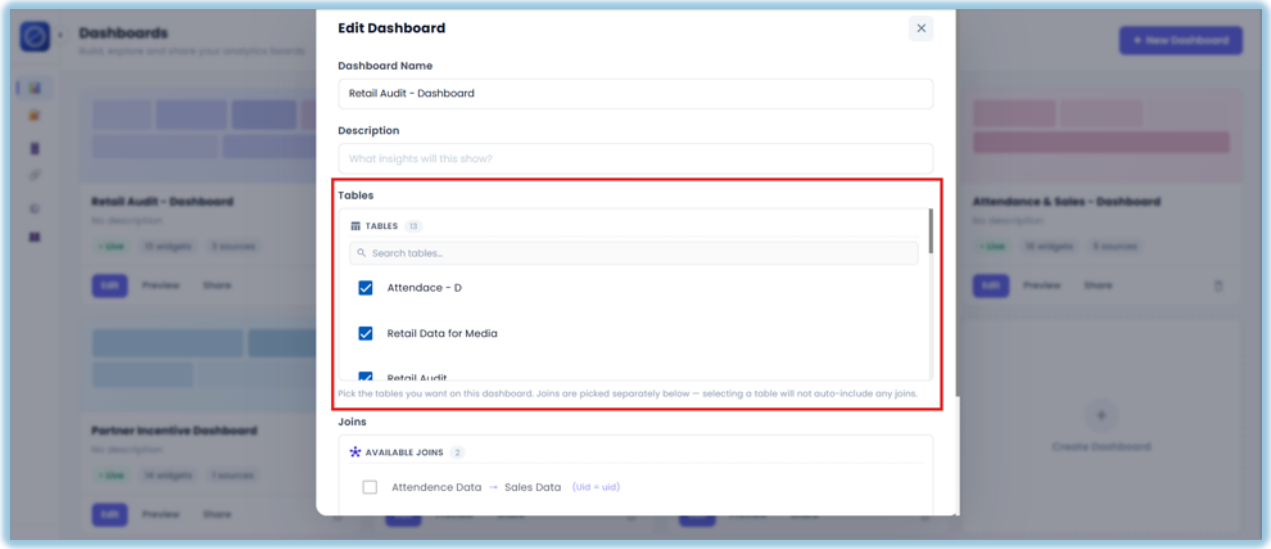
2. **Start a new dashboard** — Click the **+ Create Dashboard** button (top-right corner of the Dashboards screen).



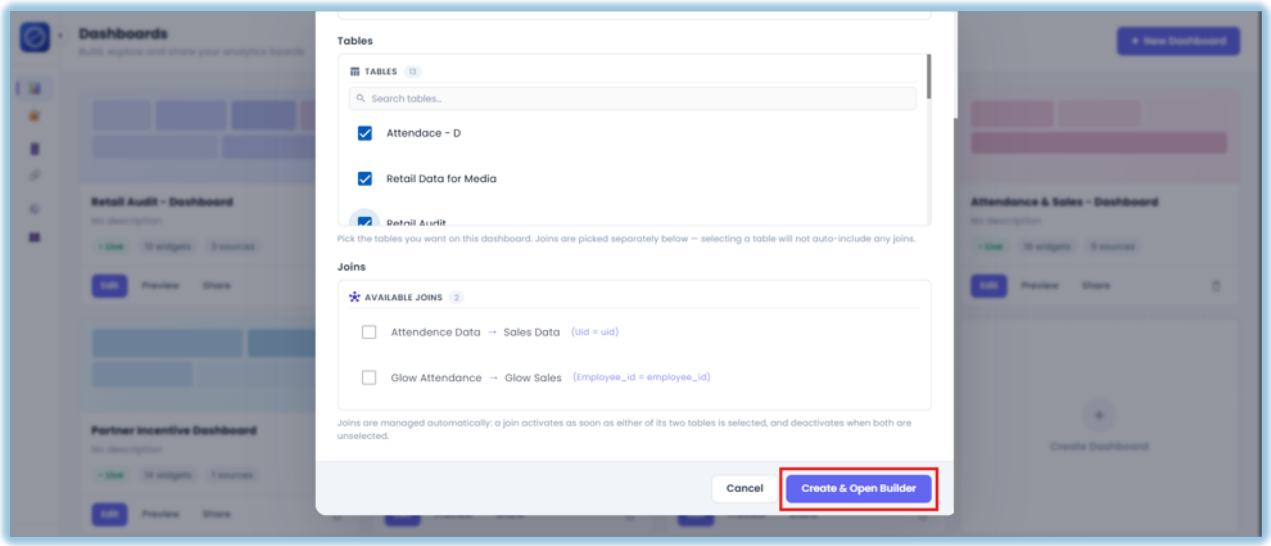
3. **Name the dashboard** — Enter a clear, descriptive name (e.g., "Store Audit — Weekly Summary" or "Training Completion Tracker"). The name appears in the dashboard list and in shared links, so choose something your learners will recognise.



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.



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.

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

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