

Dashboards Overview

Dashboards are interactive reports used to analyze the data gathered from data sources, queries or channels. They are built using various visualizations called components. Once set up, you can return to them on a continuing basis to report on the latest data.

Creating Dashboards

Select **Dashboards** from the left-hand sidebar.



To create a new dashboard select **Add Dashboard**. You will then be met with a screen asking you to select a [Dashboard Template](#) or a [Dashboard Wizard](#).

Once you have chosen the dashboard wizard or template you wish to use you will be prompted to select a data source to fuel your dashboard. Once you have selected your data source, select **Open Dashboard** to step into your dashboard and begin to work with your data.

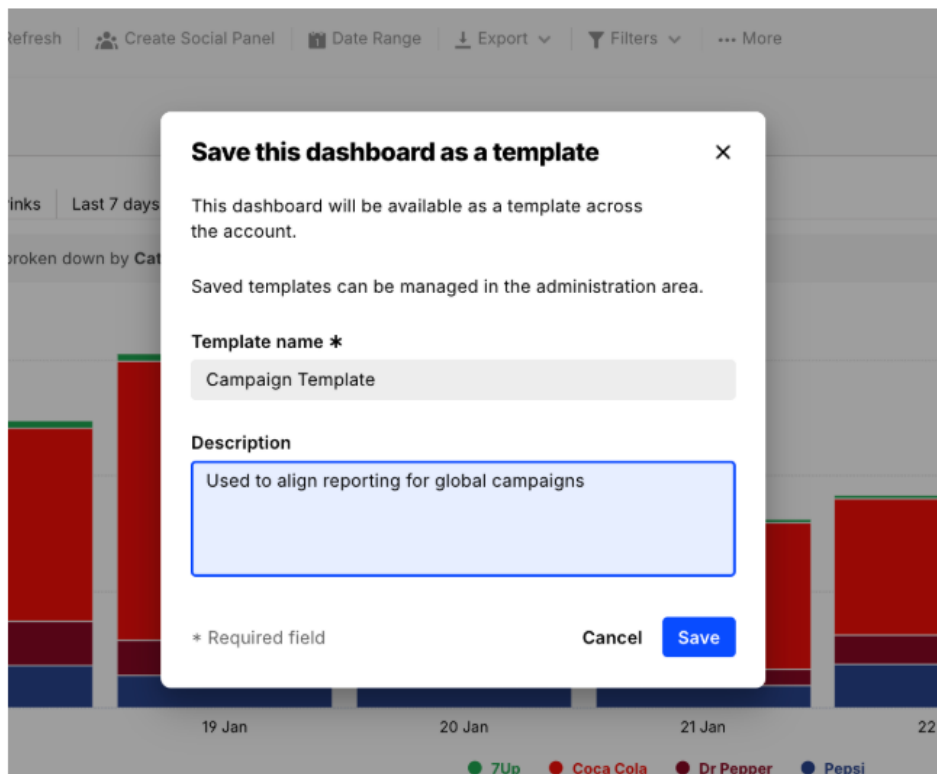
Dashboard Templates

- **Blank:** Build up your dashboard from scratch by adding components (experienced users)
- [Summary:](#) Gives you a great overview of your query's data (recommended)
- [Brand Analysis:](#) Get an overview of the conversation surrounding your brand online, including conversation volumes, trending topics, online coverage, and online sentiment analysis
- [Category Comparison:](#) Get an overview of categories you have created, including key comparisons between them as well as an in-depth analysis of each category
- [Tag Deep Dive:](#) Get an in-depth analysis of a tag you have created, including key metrics.

- **[Facebook](#)**: Get an overview of the data for a tracked Facebook page
- **[Twitter](#)**: Get an overview of the data for a tracked Twitter account
- **[Instagram](#)**: Get an overview of the data for a tracked Instagram account
- **[Images](#)**: Analyze conversations that are happening around images that contain the brand logo
- **[Influencers](#)**: Discover key influencers as easy as possible
- **[PR](#)**: Great for tracking popular articles and judging audience reaction
- **[Reputation](#)**: Aimed at finding negative mentions regarding your query terms
- **[Trends](#)**: Track the trends, conversations and people influencing an important topic or hashtag
- **[Demographics](#)**: Analyze author demographics including gender, interests, and geographic location

You can also save any existing dashboard as a template to pick from the template list in future. When viewing a dashboard, click 'more' in the menu below the dashboard name and then 'Save this dashboard as a template'. Give you template a name and description and hit save.

Now you will have this template as an option that appears in the dashboard picker whenever you create a new dashboard. This makes creating regular dashboards tailored to your specific reporting formats quick and easy and ensures everyone is working from the same starting point.



Dashboard Wizard

- **Brand Monitoring:** Explore key metrics and conversations about a brand
- **Campaign Tracking:** Analyze the impact of your campaign

See the [Dashboard Wizard article](#) for more information.

Navigating a Dashboard

Watch the below video for an overview on how to navigate your dashboard:

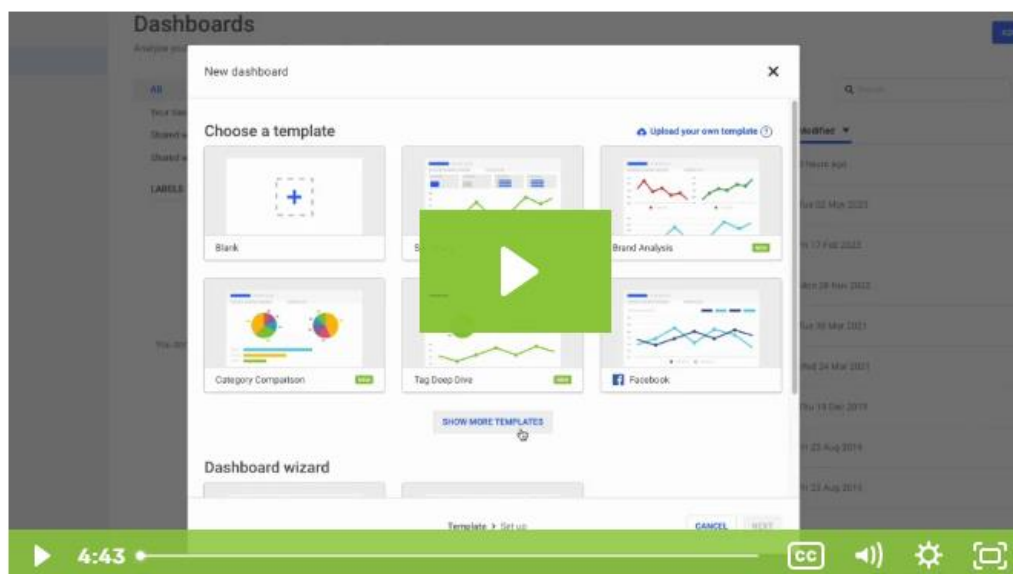


Customizing Dashboards

Whilst we have created a number of dashboard templates for you to work from, it is possible to customize your dashboard to create your preferred working environment. This allows you the flexibility to work within the application to your specific needs.

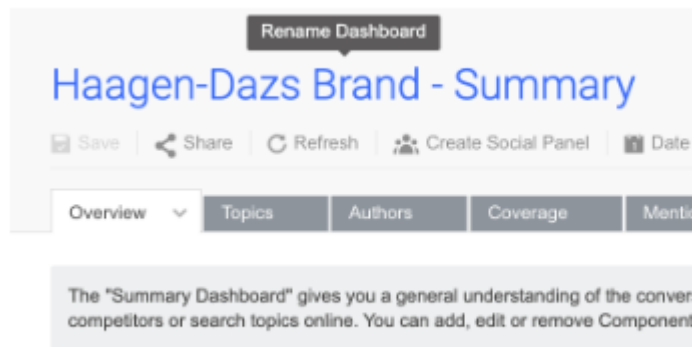
Dashboards consist of multiple tabs (located at the top of your dashboard) and tabs consist of components (sections within a tab that display different types of information).

Take a look at the below video for help with creating and editing your dashboard:



Naming a Dashboard

When a dashboard is created, it will be automatically given the name of the data source used. To rename, click on the title at the top of the dashboard and enter the desired name.

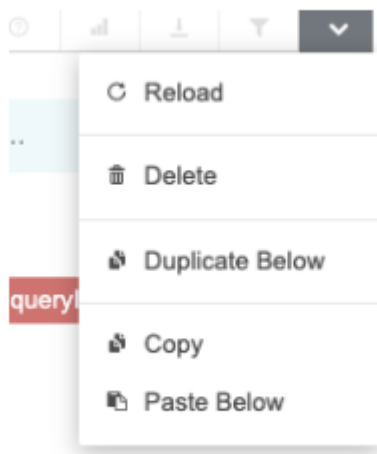


Adding a Component

To add a component, scroll to the bottom of the screen and click the **+ Add a Component** button or select **+ Add a Component** from the tab drop down menu. Within the **component picker**, you will see all of the components available. Clicking on the component will display a drop down overview of the component features. Select **Add Component** to add it to your dashboard.

Duplicating a Component

To duplicate a component, select the drop-down icon on the top right of the component that you wish to duplicate and select **Duplicate Below** from the returned options. This will then place a copy of this component underneath the existing one within that tab.



Deleting a Component

Selecting **Delete** from this drop down menu will remove this component from the tab. Note that it is not possible to restore a deleted component. You will need to replace the deleted component with a new one (as described above).

Renaming a Component

To rename a component, double click on the title of the component and type your preferred title.



Moving a Component

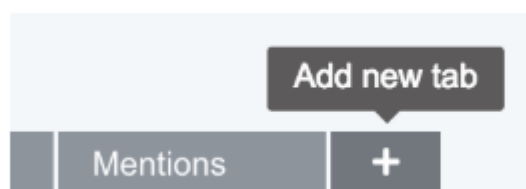
To reposition components within a tab, click anywhere in the component header (title bar), hold the mouse button down, drag the component up or down to the desired

position and release the mouse button once you are happy with the position of the component. By doing this, you can rearrange the components however you'd like, including putting components next to each other horizontally.



Adding a Tab

To add a tab click the "+" tab which lies to the right of your current component tabs.



Once you have added the new tab you can then begin to add components to it by selecting **+ Add a Component** from the bottom of the screen.

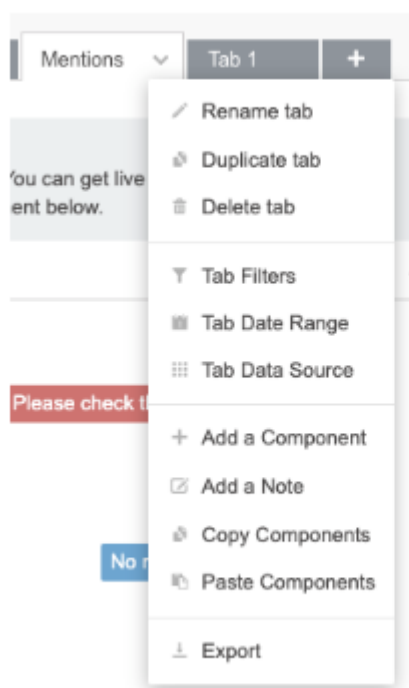
+ ADD A COMPONENT | **+ ADD A NOTE**

Note: For optimal dashboard performance, we typically recommend that you add no more than 10 tabs per dashboard and no more than 10 components per tab.

The most resource-intensive components are Key Insights, Iris-enabled Charts, Word Cloud, Benchmarking, and the Topics Wheel. If you are utilizing these components in your dashboard, we recommend that you include no more than 5 components per tab.

Renaming, Duplicating or Deleting a Tab

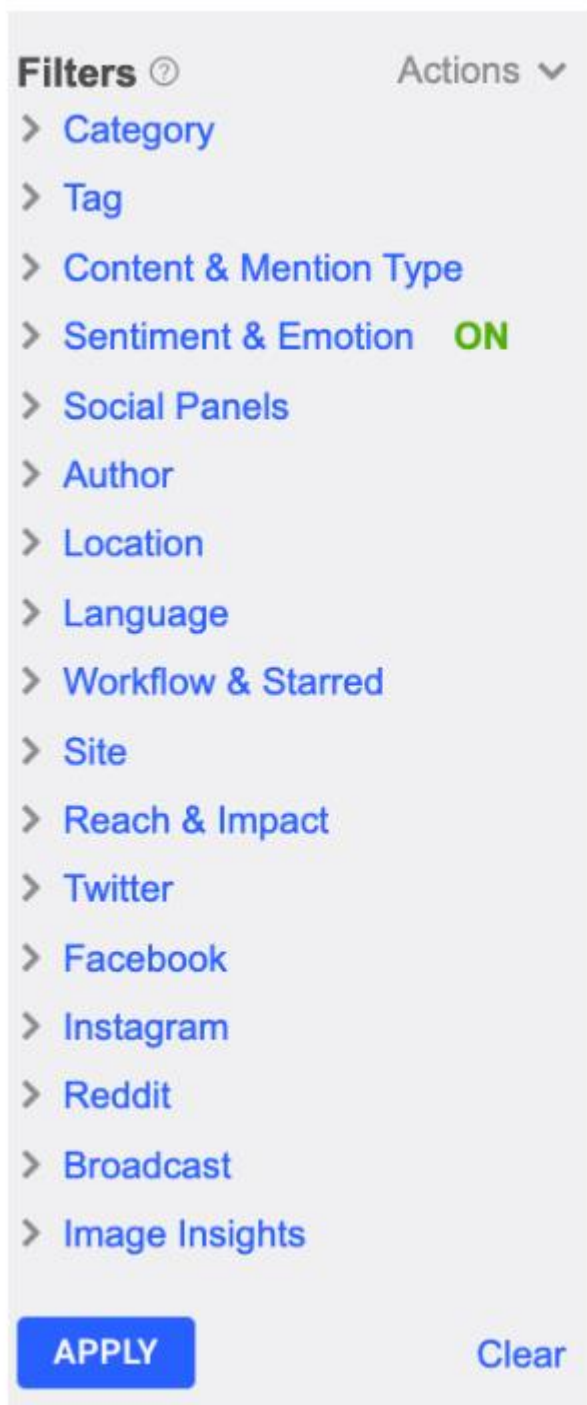
Selecting a tab reveals the drop-down arrow next to the tab name from which you can rename, duplicate or delete the tab. Note that once a tab is deleted it cannot be restored. You will need to replace it by adding a new one as described above.



Note: we suggest limiting dashboards to 10 components and 10 tabs per component at any one time. This will help the dashboard run more predictably.

Filtering by Tab

The tab drop down menu allows you to apply filters to the entire tab. The selected filters will be applied to all components within the tab as well as to any components added to the tab in the future. To apply filters to an entire tab select the **Tab Filters** option from the arrow drop-down which will open the following window:



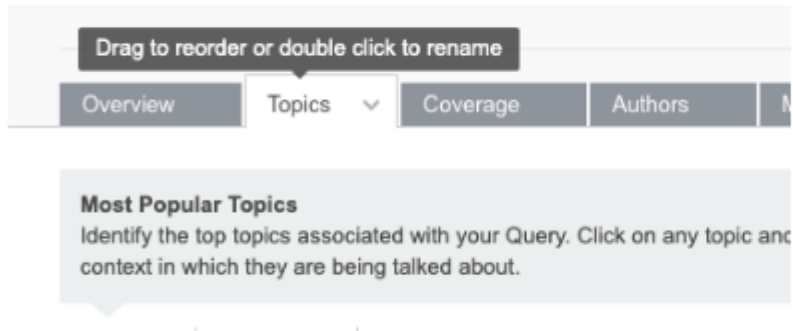
From this window you can both add and remove filters. You can learn more about the available filters from the [Filters](#) section of the guide.

This drop down also reveals the options to add tab wide date ranges and data sources (which will be applied all components within that tab and to any added subsequently).

Finally you will see options to add a component or a note and to copy and paste components.

Reordering Tabs

Hovering over the Tab name reveals the following pop up:



Now click on the tab (holding the mouse button down) and drag to the left or right until the tab is situated in the desired position. Double-click on the tab name to rename it.

You can learn more about the controls available within the dashboard in the [Controls](#) user guide.