

Lecture 1: Introduction to dashboards:

Step 1: What is Dashboard?

What is Dashboard?

- A dashboard is a visual display of key metrics and trends for records in your org.
- Source of dashboard is Reports.
- You can place one report in multiple dashboards components on a single dashboard.
- Having multiple reports on a single dashboard page makes it a powerful visual display tool.

Step 2: How does a dashboard look?



Step 3: Dashboard Folder:

Dashboard Folders

Like Reports, Dashboards are stored in a folder, So:

- Dashboard folder controls who has access to its content.
- If one has access to folder then only one can access its dashboards.
- However, to view the dashboard components, one need access to underlying reports as well.

Step 4: Important notes about dashboard:

Important about Dashboard

- Each Dashboard has a running user.
- Running user's security settings determine which data to display in dashboard.
- If the running user is a specific user, then all dashboard viewers see data based on the security setting of that user, regardless of their own security settings.
- **Dynamic Dashboards** are those for which running user is always logged in user. Here, each user views the dashboard as per their own security settings.