How to Create Your First Dashboard

With these instructions, you will learn how to:

1. Choose a template
2. Add data
3. Add a Data Player
4. Add a Word Cloud
5. Add a Column visualization
6. Sort

Open associated video...

Steps:

1. To create a dashboard, click the *New* icon

and select *Dashboard.*
2. In the resulting *Select a template* dialog, click *Single page*

, click *Freeform*, and click *OK.*
3. To add data, click *Add a source* and select *Team Content > Samples > Data > Boston 311 calls* and click *Open.* This data is from a previously uploaded file.
4. To add a data player that will filter the dashboard according to the weather, in the *Sources* panel , scroll down to *Weather Condition*, select it, and click *Add.*
5. Click the visualization to bring up the the context menu, click *Change visualization* and click *Data player*

.
6. Resize the data player to the width of the screen, and give it some more height.
7. Click to bring up the context menu again, click *Edit the title* , and type “Boston 311 Calls – Weather Condition at Time of Call”.
8. To add a word cloud to the dashboard, open the *Visualizations* panel and click the *Word cloud* visualization

.

9. To give the visualization some data, open the *Sources* panel and drag the following data items into the visualization:
    - *Request Reason* to **Words**
    - *Days to Resolution* to **Size by**
    - *On-Time Status* to **Color by**
10. The on-time status should be sorted in reverse alphabetical order so that the values for *On Time* are always green. Click *On-Time Status*, click *Sort* in the context menu, select *Sort descending* and click to dismiss the *Sort* panel.
11. Click *Collapse*
12. Drag the visualization down and align it with the left edge of the data player.
13. In the context menu, click *Edit the title* , and type “Request Reason (Average Days to Resolution)”.
14. To add a column visualization to the dashboard, open the *Visualizations* panel and click the *Column* visualization .
15. To give the visualization some data, open the *Sources* panel and drag the following data items into the visualization:
    - *Ward* to **Axis label**
    - *Service Requests* to the first **Value**
16. To sort the bars from highest to lowest, click *Service Requests*, click *Sort* in the context menu, select *Sort descending*, and click to dismiss the *Sort* panel.
17. Click *Collapse* .
18. Drag the visualization down and align it with the top of the word cloud and the right edge of the data player.
19. In the context menu, click *Edit the title* , and type “Service Requests by Ward”.
20. To preview the dashboard, click the *Edit Mode* toggle button .
21. Press play on the data player and watch the visualizations update.

Congratulations! You have created your first dashboard! You can save the dashboard into *My content* and open it again later.