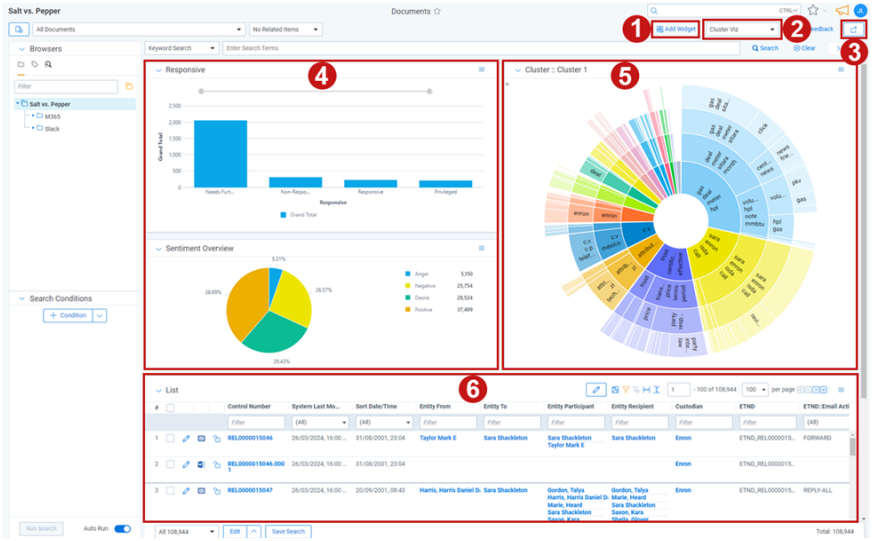
Dashboard and pivot quick reference guide

Use this guide to navigate, create, and edit your dashboard and pivot tables.



Dashboard areas		
1	Add Widget button	Adds a pivot or cluster widget to the dashboard.
2	Dashboard drop-down menu	Click to change dashboards or create a new one. An icon displays on the left side of the menu if your dashboard has unsaved changes.
3	Export Dashboard button	Click to export this dashboard's charts to Excel for further customization.
4	Pivot widget	Displays a bar graph, stacked bar graph, pie chart, line chart, or table.
5	Cluster widget	Displays the selected cluster.
6	List	Displays the item list.
	Collapse toggle	Minimizes the widget.
	Menu	Provides options for working with the displayed widget.

Dashboard drop-down options		
	New Dashboard	Creates a new blank dashboard.
	Save	Saves the current dashboard
	Save as	Saves changes to a new dashboard.
	Edit	Edits the selected dashboard.
	Delete	Deletes the selected dashboard.

Widget menu options	
Edit / Edit Pivot	Edits the Pivot or lets you choose the cluster for a cluster widget.
Save Pivot profile	Saves a new pivot profile from the current one.
Maximize	Maximizes the widget.
Close	Removes the widget.
Display Type	Choose Bar Chart, Stacked Bar Chart, Line Chart, or Table.
Export PNG	Exports the widget as a .png image file
Export XLSX	Exports the widget as a .xlsx Excel file.
Show (blank)	Shows or hides totals in the chart to improve readability.
Show Legend	Toggles the display of the Pivot chart legend.
Horizontal Orientation	Arranges the information horizontally
Vertical Orientation	Arranges the information vertically.

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