# Relativity®

## Dashboard and Pivot Quick Reference Guide
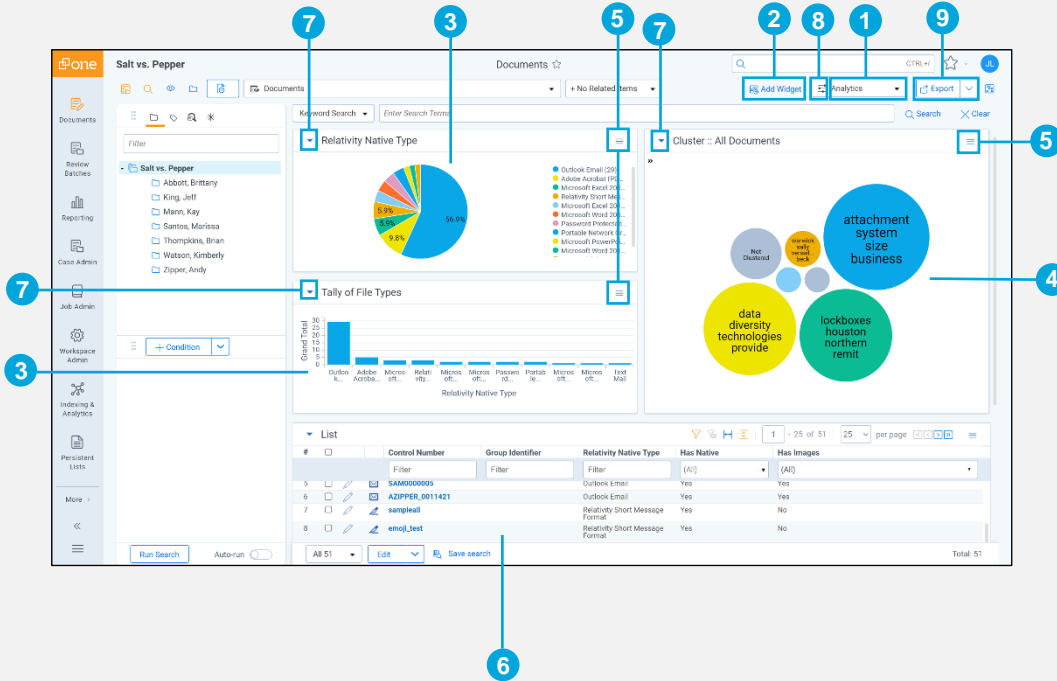


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| **Dashboard Areas** | 1 | Dashboard drop-down | Creates a new blank dashboard. |
| | 2 | Add Widget button | Adds a Pivot or Cluster widget to the dashboard |
| | 3 | Pivot widget | Displays a bar graph, stacked bar graph, pie chart, line chart, or table. |
| | 4 | Cluster widget | Displays the selected cluster. |
| | 5 | Menu | Provides options for working with the displayed widget. |
| | 6 | List | Displays the item list. |
| | 7 | Minimize widget | Minimizes the widget. |
| | 8 | Dashboard state | This area shows whether the dashboard contains unsaved changes or not. |
| | 9 | Export Dashboard button | This button lets you export your dashboard's charts to Excel for further customization. |

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| **Dashboard Drop-down Options** | New Dashboard | Creates a new blank dashboard. |
| | Save | Saves the current dashboard. |
| | Save As | Saves changes to a new dashboard. |
| | (pencil icon) | Edits the selected dashboard. |
| | (trash icon) | Deletes the selected dashboard. |

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| **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. |
| | Remove | Removes the widget. |
| | Display Type | Choose Bar Chart, Pie Chart, Line Chart, or Table. |
| | Export PNG | Exports the widget as a PNG image file. |
| | Export XLSX | Exports the widget as an Excel file. |
| | Show (blank) | Shows or hides totals in the chart to improve readability. |
| | Show Grand Total | Toggles the display of grand total in the chart. |
| | Show Legend | Toggles the display of the Pivot chart legend. |
| | Show Sub-Chart | Enables the sub-chart for bar or line charts. |
| | Show Labels | For a cluster widget, this displays the labels for the cluster visualization. |
| | Horizontal Orientation | Arranges the information horizontally. |
| | Vertical Orientation | Arranges the information vertically. |

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| **Pivot Properties** | Pivot profile | The name of the Pivot profile saved. |
| | Group By | Groups Pivot data by the selected field. |
| | Group by Results Returned | Specifies whether to return all results for the chosen Group By field or a user-entered number of the top or bottom part of the results. |
| | Pivot On | Breaks down the total for each grouped item. |
| | Pivot On Results Returned | Specifies whether to return all results for the chosen Pivot On field or a user-entered number of the top or bottom part of the results. |
| | Sort On | Sorts the results for either the Group By or Pivot On field in ascending or descending order. |
| | Default Display Type | Choose Bar Chart, Stacked Bar Chart, Pie Chart, Line Chart, or Table. |