

# Creating Dashboard Templates in Alchemer Pulse

How you can use your own dashboards to create your own dashboard templates.

## Overview

What is the difference between a dashboard and a dashboard template?

A dashboard template can be used as a template - so when you create a new dashboard from a template, the same reports are linked

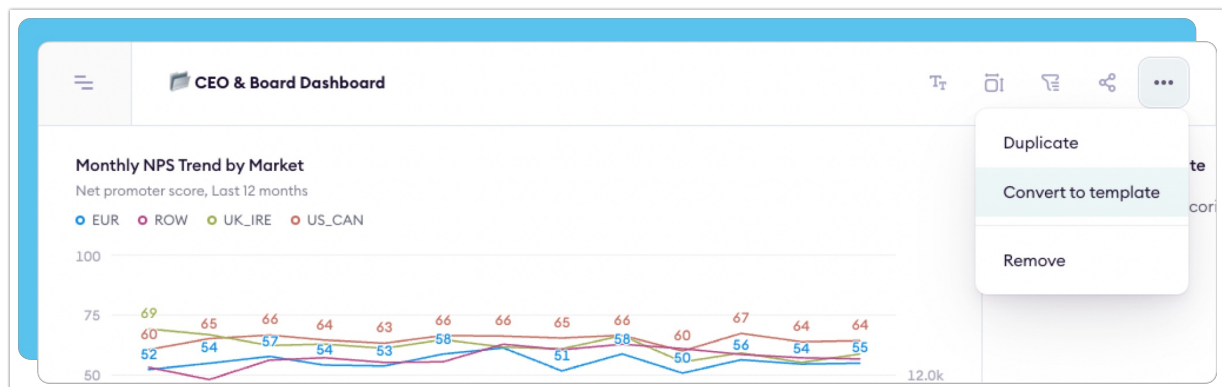
What is the difference between using a template and copying dashboards?

When you copy a dashboard, you also create copies of the reports from the original dashboard. When you create a new dashboard from a template, the reports are also brought into the new dashboard.

## How to use templates

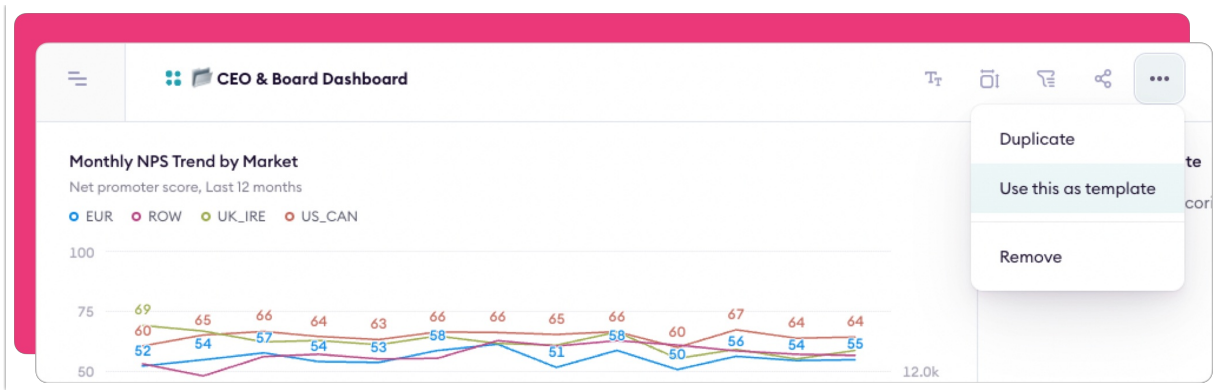
### Convert your dashboard to a template

1. Open the dashboard and click on the three dots in the top right corner
2. Click on the "Convert to template" option



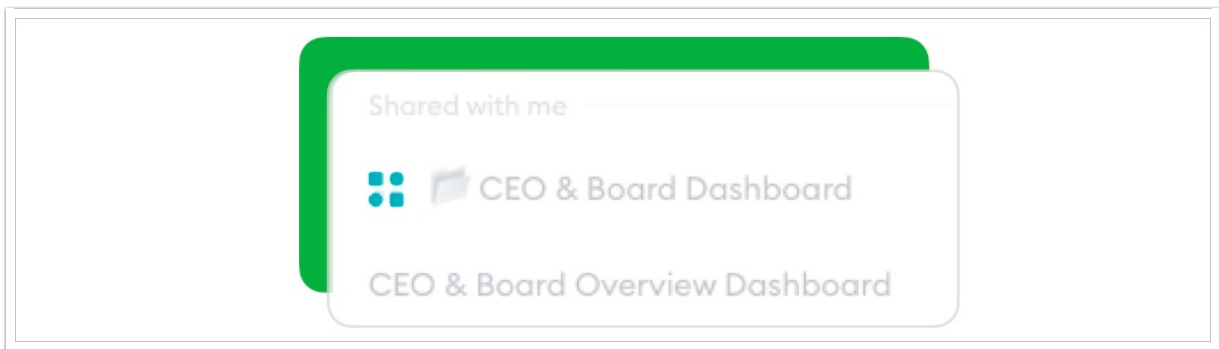
### Use your dashboard template to create a new dashboard

1. Open the template you want to use and click on the three dots in the top right corner
2. Click on the "Use this as template" option
3. A new dashboard is created using the same reports as the template

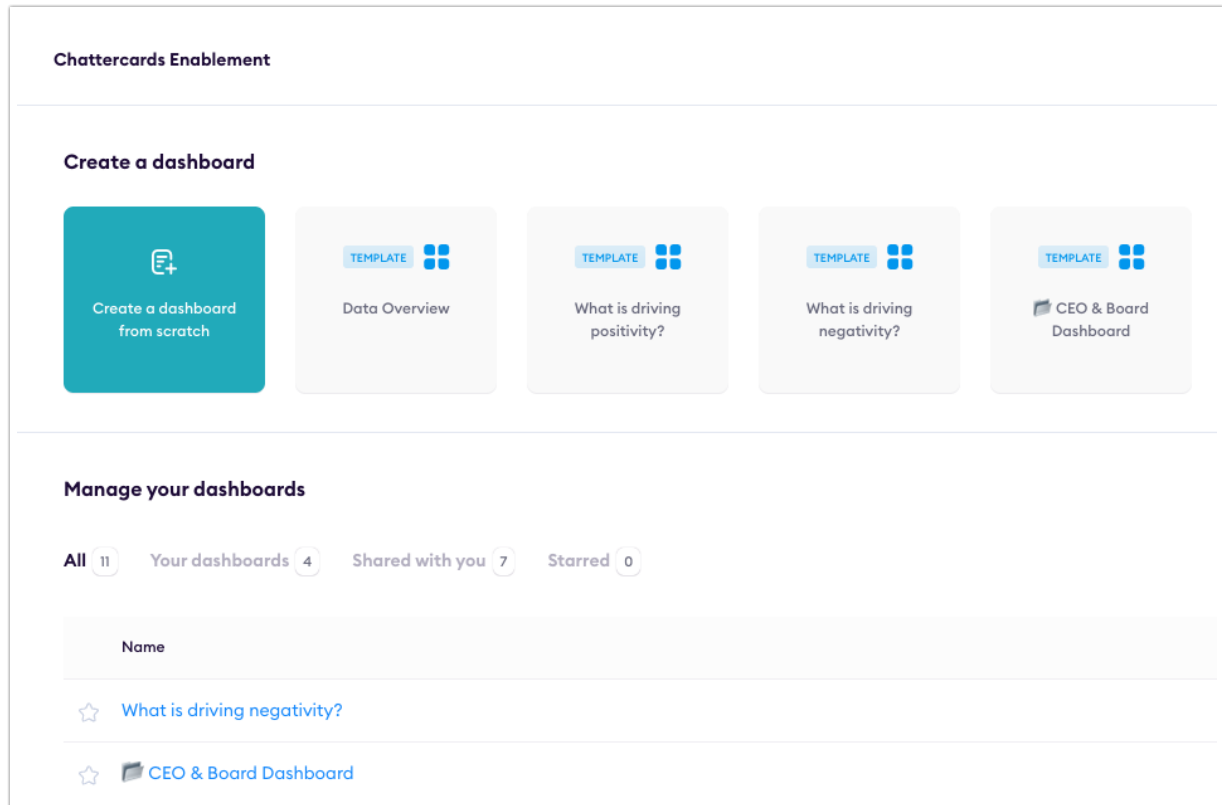


## Identifying which dashboards are templates

If a dashboard has already been converted to a template, you will see the template icon next to the dashboard name.



Any templates you create will also appear at the top of the Dashboards page, alongside the three pre-built templates that every user has access to. To find out more about the pre-built templates, click [here](#).



## FAQ's

**What if I make a change to a template, will this change all of the dashboards previously created?**

No, dashboards that have already been created will not change if you change the template

**What if I make a change to a dashboard, will this change the original template?**

No, any changes you make to that dashboard only affect that dashboard

**What if I make a change to a chart that is linked to a template?**

If a template is linked with that chart, any changes to that chart will appear on any dashboard or template that has that chart. Alternatively, you can create a new chart rather than saving changes to an existing chart and then link that chart to your choice of dashboards/templates

**What if I make a change to a chart that is linked to a dashboard created from a template?**

If multiple dashboards are linked with that chart, any changes to that chart will appear on any dashboard or template that has that chart. Alternatively, you can create a new chart rather than saving changes to an existing chart and then link that chart to your choice of dashboards/templates

**How can I make a template a dashboard again?**

This can only be done by [contacting our support team](#).

**Can I use a template as a dashboard?**

Yes, a template is just a dashboard that can be used as a template. It still acts the same as a dashboard

**What happens to annotations?**

Any annotations within a template are copied over to the new dashboard, but they are not linked

so you can make changes to a text box on one dashboard without affecting any others

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