

Dashboard Layout

Alchemer Dashboard is currently waitlist only. [Visit this page](#) to learn more about Dashboard or join the waitlist!

Editing the layout of a Dashboard lets you snap visualizations into place and change the visualization size.

Visualizations within a Dashboard are easy to move around and snap into place on a relative flow layout. This helps keep the layout of your Dashboard neat and organized.

Your Dashboard layout reacts to your browser width and resolution. If you decrease your browser width or resolution, a horizontal scroll bar appears at the lower edge of your screen.

Reorder the Visualizations

You can reorder the visualizations in a Dashboard by dragging and dropping them in **Edit** mode. To change the visualization layout, follow these steps:

1. Select **Dashboards**, on the top navigation bar.
2. Navigate to the Dashboard you would like to edit.
3. Select the **Edit** button at the upper right of the Dashboard. If this button is grayed out, you do not have edit privileges for the Dashboard. To resolve this, contact your administrator or the creator of the Dashboard.
4. Select the bar that appears at the top of any visualization when you hover over it. This allows you to drag and drop your visualizations to new positions in the Dashboard.
5. Select **Save** in the top menu bar

Move a Visualization to a Different Tab

If your Dashboard has multiple tabs, you can move the visualizations between tabs. To move visualizations to new tabs, follow these steps:

1. Select the **Edit** button at the upper right of the Dashboard.
2. Select the **More** menu for the visualization you would like to move to another tab.
3. Select **Move to tab**. This option is not available if the Dashboard has only one tab, or if the Dashboard has no tabs.
4. Select the tab to move the visualization to from the list of tabs in the Dashboard.

5. Select **Move**.

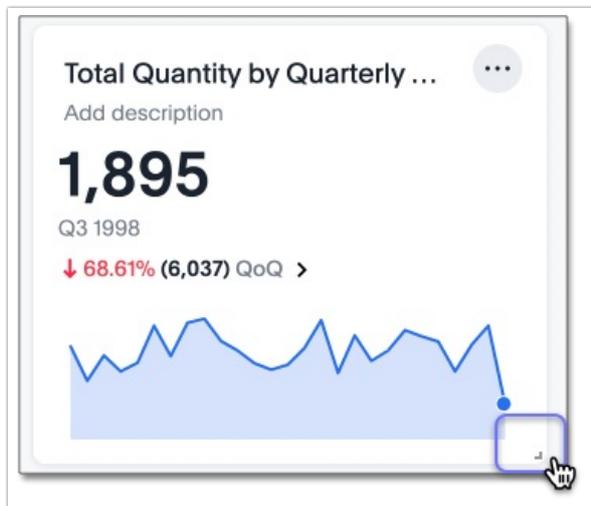
6. Select **Save** in the top menu.

Change the Size of a Visualization

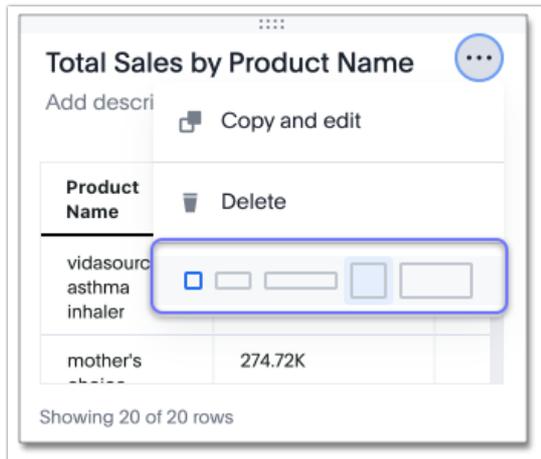
You can customize your Dashboard visualizations to be any size. You can also use the size picker at the bottom of a visualization's **More** menu in edit mode to choose between predetermined sizes for each visualization. All visualizations have 5 predetermined size options, in addition to the custom size option. To change the size of a visualization with custom tile sizes, follow these steps:

1. Navigate to the Dashboard you would like to edit.
2. Select the **Edit** button at the upper right of the Dashboard. If this button is grayed out, you do not have edit privileges for the Dashboard. To resolve this, contact your administrator or the creator of the Dashboard.
3. Select the size changing icon in the lower-right corner of any visualization, and drag the visualization to the correct size using your mouse. Alternatively, use the 5 predetermined sizes, by selecting the visualization's **More** menu. The last item in the More menu shows different possible sizes, with the current size selected.

Custom size:



Predetermined sizes:



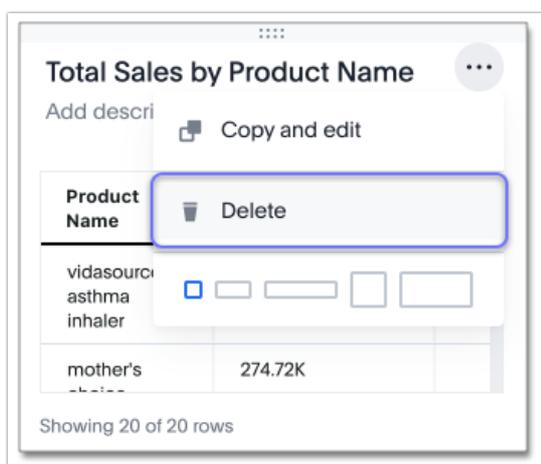
4. Select **Save** in the top menu bar.

Delete a Visualization From Your Dashboard

To delete a visualization:

1. Navigate to the Dashboard that contains the visualization you would like to delete.
2. Select the **Edit** button at the upper right of the Dashboard. If this button is grayed out, you do not have edit privileges for the Dashboard. To resolve this, contact your administrator or the creator of the Dashboard.
3. Select the **More** menu icon for the visualization you would like to delete.

Alchemer Dashboard displays the dropdown menu.



4. Select **Delete**.

5. Select **Save** in the top menu bar.

Make a Copy of a Visualization From Your Dashboard

You may see a visualization that you would like to edit or filter, without editing or filtering the Dashboard. To do this, you can **make a copy** of a visualization. The copy you create takes into account the Dashboard filters that apply to the visualization.

To create a copy of a visualization and edit it, follow these steps:

1. Navigate to the Dashboard that contains the visualization you would like to copy and edit.
2. In the upper-right corner of the visualization you would like to edit, select the **More** icon.
3. Select **Make a copy**. Note that this option is only available in **View** mode.

A copy of the Chart that created the visualization opens in a new tab, with “Copy of” added to the beginning of the title.

4. Make any changes you want to the visualization.
5. Click the **More** icon and select **Save**.

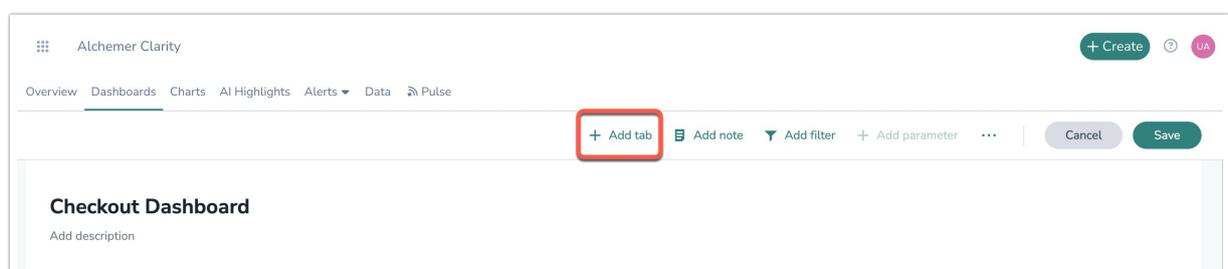
The Save Chart dialog appears.

6. Change the name and description, as needed, and select **Save Chart**.

When you navigate back to the Charts page, your edited Charts appears in the list.

Dashboard Tabs

You may want to separate your Dashboard into multiple tabs, grouping certain visualizations together in each tab. For example, you may have a **Sales** Dashboard that contains top-level KPIs and more detailed charts. You can create a tab for the top-level KPIs for executives to view, and a tab for the more detailed charts that managers need to monitor. To add tabs, select the **Edit** button at the upper right of the Dashboard, and select **+ Add tab** in the top menu.



Other Dashboard Edits

Other Dashboard actions include actions you normally perform on your search as well as actions

that you can only perform on a Dashboard. These actions appear under the **More** menu icon for the Dashboard, in **view** or **edit** mode, or under the **More** menu icon for a visualization, in **view** or **edit** mode.

For example, in **View** mode for a Dashboard, the Dashboard more menu allows you to rename the Dashboard, [manage Dashboard schedules](#), [download the Dashboard as a PDF](#), make a copy of the Dashboard, and so on. The **Rename** option also allows you to edit the object description. In **Edit** mode, the Dashboard more menu only allows you to delete the Dashboard.

In **View** mode, the visualization more menu allows you to rename the visualization, download it, analyze it with AI highlights, make a copy of the visualization, and so on. The **Rename** option also allows you to edit the object description. In **Edit** mode, the visualization more menu only allows you to delete the visualization or change its size.

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