

Dashboard Notes Tiles

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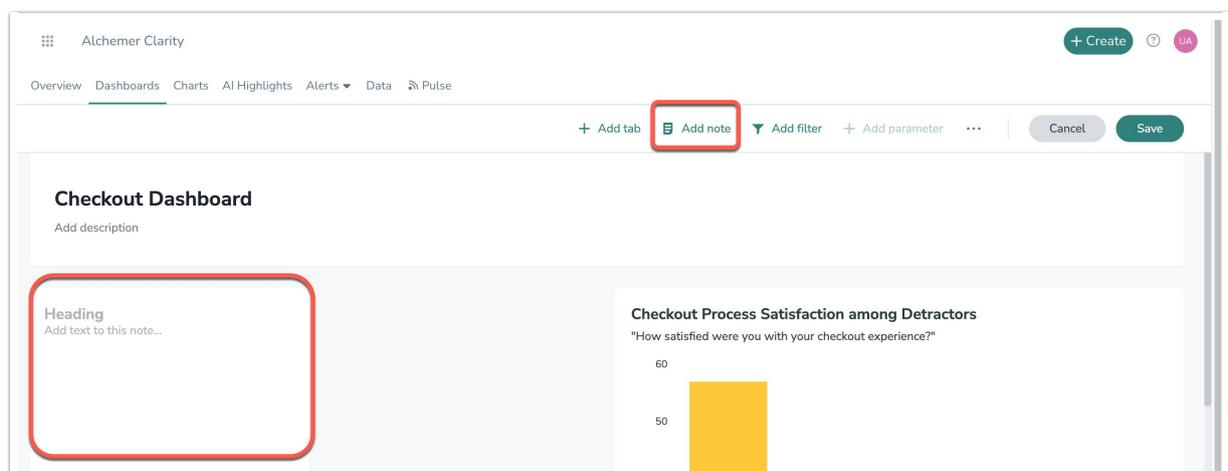
Add notes to your Dashboards, so that viewers can quickly understand how to use the data and visualizations you gathered.

Note tiles can provide an overview of a Dashboard or visualization, company branding through images, definitions of terms used in the Dashboard, descriptions of how to best use the data in the Dashboard or visualization, and so on. You can add note tiles anywhere in the Dashboard, unlike the Dashboard description, which is only at the top of the Dashboard. For example, if you have a visualization far down in the Dashboard that needs images and a long description to be best understood, use a note tile.

Creating note tiles

To create a note tile for your Dashboard, 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. In the top menu bar, select **Add note**.
4. A blank note template appears in the upper left corner of your Dashboard.



5. Add any content you would like to the note.

6. To move the note to a different location in the Dashboard, select the small gray bar that appears at the top of the note when you hover over it. This allows you to drag and drop your notes to new positions in the Dashboard.

7. When you are finished editing the note tile, select **Save** in the top menu bar of the Dashboard, or select **Add note** to create another note.

Supported formatting

- Note tiles support the following formatting options:
 - Text: Heading levels 1 and 2, body text
 - Bold, italics, underline, strikethrough
 - Hyperlinks
 - iFrames
 - Bulleted list
 - Numbered list
 - Images from your computer or from a URL. Either .jpg, .jpeg, or .png. The image size can't be greater than 5 MB.
 - Tables

Using hyperlinks

To add a hyperlink to your note tile, follow these steps:

1. Navigate to the Dashboard with the note tile 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 note. The formatting bar at the top of the note tile appears.
4. Type the word or phrase you would like to display as the link title.
5. Highlight the word or phrase, and select the **hyperlink** icon, to the right of the **strikethrough** icon, in the formatting bar at the top of the note tile.
6. In the **Link** text box, add the URL you would like to link to.
7. Select **Add**.
8. When you are finished editing the note tile, select **Save** in the top menu bar of the Dashboard.

Embedding content with iFrames

To embed content using an iFrame, follow these steps:

1. Navigate to the Dashboard with the note tile 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 note. The formatting bar at the top of the note tile appears.
4. Select the **Embed** button .
5. Paste the embed code for your content. This can be a video, a PDF, or a Figma file.
6. Select the edges of the embedded content and drag to resize the content. Select the edges of the tile and drag to resize the note tile.
7. When you are finished editing the note tile, select **Save** in the top menu bar of the Dashboard.

Inserting images

Images must be either .jpg, .jpeg, or .png. The image size can't be greater than 5 MB. With the GA of the note tiles feature, you don't need a specific privilege to upload images. To add an image to your note tile, follow these steps:

1. Navigate to the Dashboard with the note tile 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 note. The formatting bar at the top of the note tile appears.
4. Select the **image** icon, to the right of the **numbered list** icon.
5. The **Add image** dialog appears. Select **From computer** or **From URL**, depending on where the image is.
6. If you select **From computer**, click **Select file**, and add a file from your file selector. Alchemer Dashboard allows .png, .jpg, or .jpeg files, 5 MB or less.
7. If you select **From URL**, add the URL of the image in the **Link** text box.
8. Select **Add**.
9. Change the image size or rearrange the note tile as necessary.
10. When you are finished editing the note tile, select **Save** in the top menu bar of the Dashboard.

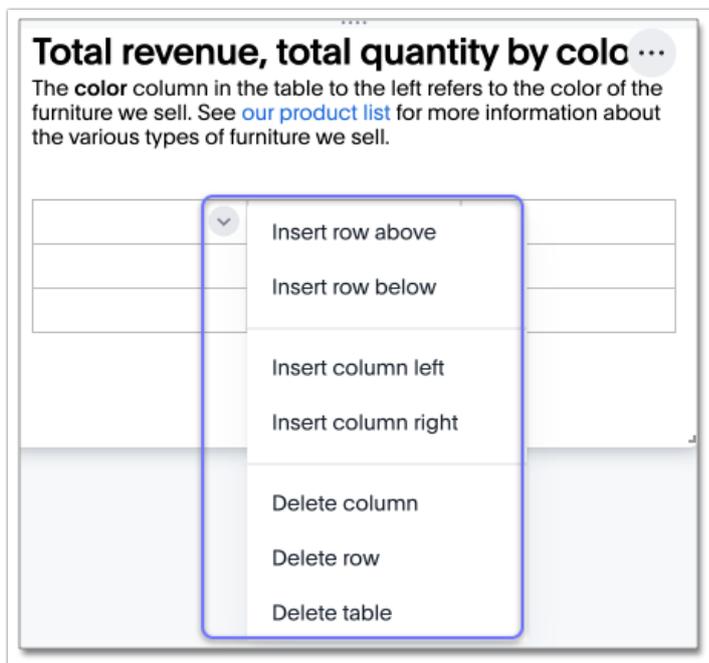
Formatting tables

To add a table to your note tile, follow these steps:

1. Navigate to the Dashboard with the note tile 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 area in the note where you would like to add the table. The formatting bar at the top of the note tile appears.
4. Select the **table** grid icon, at the far right of the formatting bar.
5. A 3-by-3 table appears in the note tile. Note that you cannot move the location of the table itself; you must make sure to place your cursor in the correct spot before you add a table, or move items around the table.
6. Add or remove columns or rows as necessary. To add or remove columns or rows, select the **down** arrow that appears when you select any table cell. The table menu appears. Select **Insert row [above | below]** , **Insert column [left | right]**, or **Delete [column | row | table]** .



7. Add content in the table cells.
8. When you are finished editing the note tile, select **Save** in the top menu bar of the Dashboard.

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