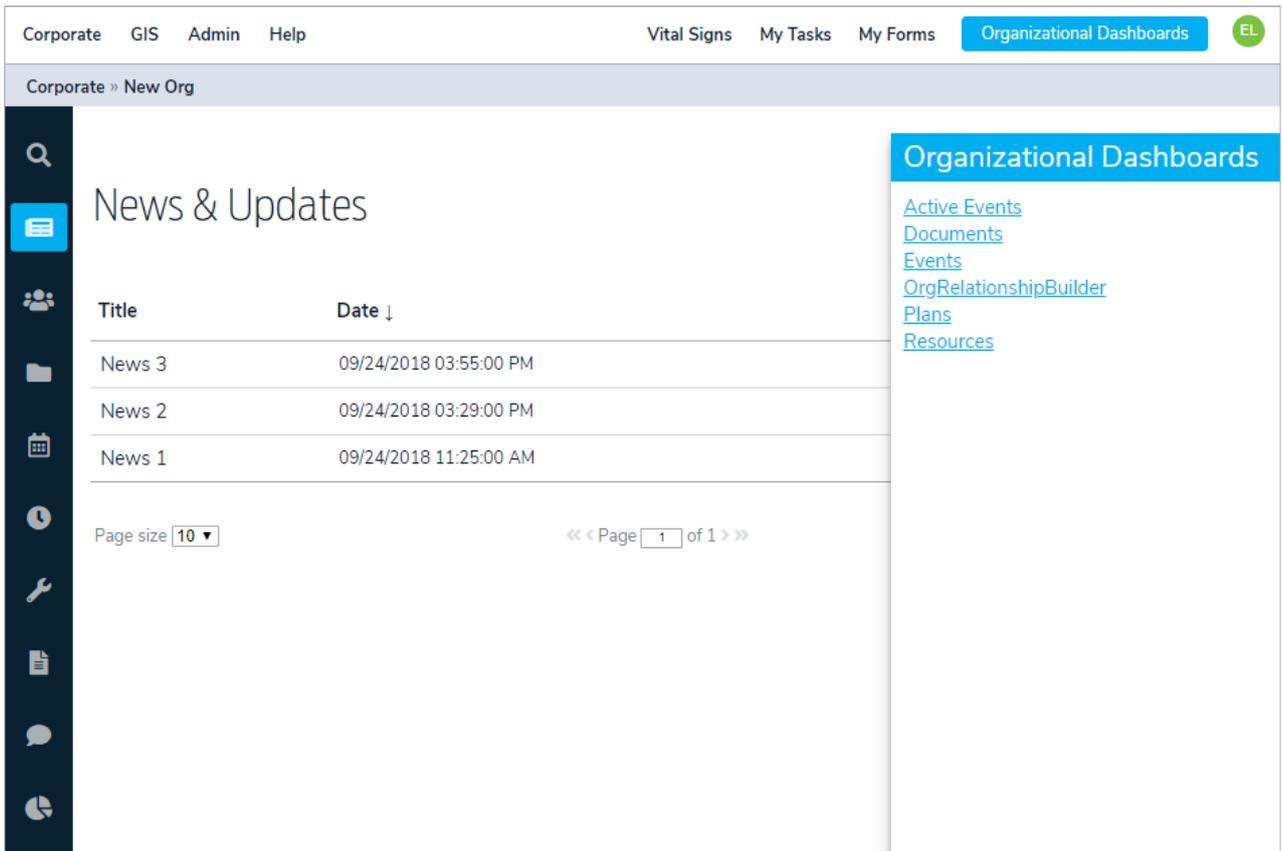


Create an Organizational Dashboard

An **organizational dashboard** is an **Organization Editor** form type that displays or collects specific information about the org it's been shared to, also allowing you to create scoped reports directly from the form. Examples of org dashboards include a list of contacts, plans, or active events in the org.

You can access an organizational dashboard any time you're working in the org to which the form has been shared (with the exception of [Plans](#) or [Events](#)).



The screenshot shows a software interface with a top navigation bar containing 'Corporate', 'GIS', 'Admin', 'Help', 'Vital Signs', 'My Tasks', 'My Forms', and 'Organizational Dashboards' (highlighted in blue). Below the navigation bar is a breadcrumb trail 'Corporate » New Org'. On the left is a dark sidebar with various icons. The main content area is titled 'News & Updates' and contains a table with the following data:

Title	Date ↓
News 3	09/24/2018 03:55:00 PM
News 2	09/24/2018 03:29:00 PM
News 1	09/24/2018 11:25:00 AM

Below the table, there is a 'Page size' dropdown set to '10' and a pagination control showing 'Page 1 of 1'. On the right side, there is a blue header for 'Organizational Dashboards' with a list of links: [Active Events](#), [Documents](#), [Events](#), [OrgRelationshipBuilder](#), [Plans](#), and [Resources](#).

The Organizational Dashboards panel.

An **executive dashboard** is an organizational dashboard that's been configured to display multiple, high-level [reports](#) .

To create an executive dashboard, follow the instructions below, customizing the form as needed and adding the reports that summarize the status of the events, plans, resources, etc. in your organization.

Form 'Executive Dashboard'

Form Generated



Executive Dashboard

Total Plans: 29
Past Due: 29
Upcoming Reviews: 0

Past Due Plans

Title	Organization	Next Review Date	Owner	Actions
QA BC Plan	QA	01/30/2012 08:59:00 AM	Unknown	
Launch Ops BC Plan	Lauch Ops	04/15/2012 08:58:00 AM	Unknown	
		04/26/2012 08:54:00 AM		
Information Security Policy	I.T.	06/05/2012 01:30:00 PM		
Division 1 BC Plan	Division 1	12/11/2012 10:40:00 AM	Unknown	
IT BC Plan	IT	05/30/2013 08:57:00 AM	Unknown	
Production Operations BC Plan	Inventory	10/25/2013 08:55:00 AM		

Tier 1 Processes

Name	RPO	RTO	Actions
72(t)			
Action Copy Monetary			
Communication to Staff			
Death Redemptions			
Human Resources			
New Accounts	4-24 hours	4-24 hours	

An example of an executive dashboard.

To create an organizational dashboard:

1. Navigate to an applicable organization using the the menu at the top-left of any page.



2. Click the **Forms** icon in the menu to the left.

3. Click **Add**.

Corporate GIS Admin Help Vital Signs My Tasks My Forms **Organizational Dashboards** EL

Corporate » New Org

Forms

Filter Add Share Forms Refresh

Title ↑	Type	Description	Actions
Events	Organization Editor		
New Form	Custom Form		
New Form	Custom Form		
OrgRelationshipBuilder	Organization Editor		
Plans	Organization Editor		
Relationship Editor Form	Relationship Editor		
Resources	Organization Editor		

Page size << Page of 1 >> Displaying 1 - 7 of 7

The Forms page.

4. Enter a name for the form in the **Title** field.
5. Select **Organization Editor** from the **Type** dropdown menu.
6. **Optional:** If needed, select an alternate folder for the form by clicking **Choose Folder**.
7. **Optional:** Enter a description of the form.

Forms

General

Title:

Type:

Folder: [Choose Folder](#)

Description:

A new Organization Editor form.

8. Click **Save & Continue**.
9. Click the **Design** tab.
10. To add a [report](#) to the form:
 - a. Click the form canvas > **Tools > Add Report**
 - b. Enter keywords in the **Search** field to locate the existing report, then click to select it.

Reports

Search: Columns:

Add multiple controls

The report settings.

- c. Use the **Columns** dropdown menu to select the fields you want to include in the report. To include all fields, skip this step.
- d. Click **Add report**.

- e. Continue steps a. to d. above to add more reports.
11. To add the relationship builder to the form:
- a. Click the form canvas > **Tools** > **Add Relationship Builder**.
 - b. Select the object you want to create the object for from the dropdown menu.
 - c. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship for a document object in the organization where the form is being accessed, you'd select **Yes**, but if the user should be able to select a document from another org, you would select **No**.

The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 1". Below the heading is the question "What type of object do you want to create this relationship for?". There is a dropdown menu with "Document" selected. Below that is the question "Run Relative?" with a dropdown menu showing "No". At the bottom right, there are two buttons: "Start Over" and "Step 2".

Step 1 of the Relationship Builder.

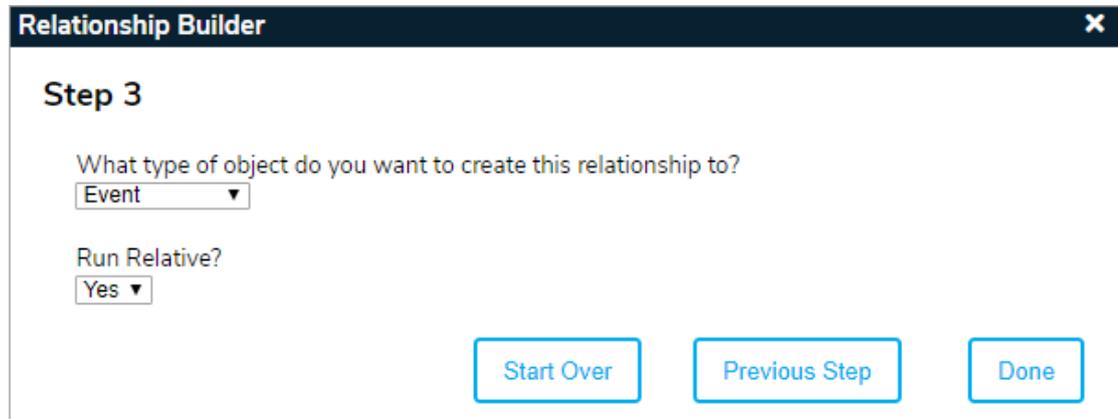
- d. Click **Step 2**.
- e. Select the relationship type(s) you want to create. Relationship types are configured in the [Referential Data Manager](#) .

The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 2". Below the heading is the question "What type of relationship do you want to create?". There are two buttons: "Check All" and "UnCheck All". Below these are five checkboxes with labels: "Not Specified", "A Display Name" (checked), "Adjacent to", "Component of", and "Depends on". At the bottom right, there are three buttons: "Start Over", "Previous Step", and "Step 3".

Step 2 of the Relationship Builder.

- f. Click **Step 3**.
- g. Select the type of object you want to create the relationship to from the dropdown menu.
- h. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the

current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship to an event object within the current organization, you'd select **Yes**, but if the user should be able to select an event from another org, you would select **No**.

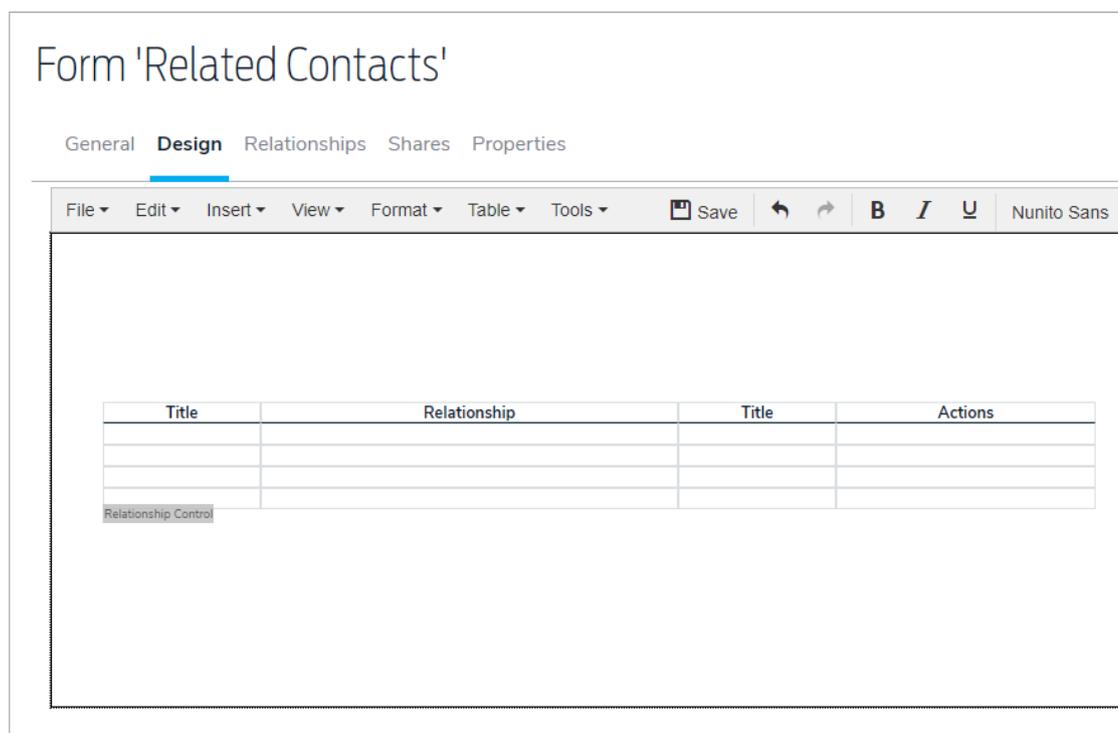


The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The dialog is at "Step 3" and contains the following elements:

- A question: "What type of object do you want to create this relationship to?"
- A dropdown menu with "Event" selected.
- A question: "Run Relative?"
- A dropdown menu with "Yes" selected.
- Three buttons at the bottom: "Start Over", "Previous Step", and "Done".

Step 3 of the Relationship Builder.

- i. Click **Done**.



The screenshot shows the "Form 'Related Contacts'" design tool. It has a top navigation bar with tabs: "General", "Design" (selected), "Relationships", "Shares", and "Properties". Below the tabs is a menu bar with options: "File", "Edit", "Insert", "View", "Format", "Table", "Tools", "Save", undo, redo, bold (B), italic (I), underline (U), and "Nunito Sans". The main workspace contains a table with the following structure:

Title	Relationship	Title	Actions

A "Relationship Control" label is visible in the bottom left corner of the table area.

The relationship builder tool.

- j. Repeat steps a. to i. above to continue adding more relationship builder forms.
12. Continue designing the form, adding any elements to collect data, if needed. See the [Forms](#) section for more information.
13. [Share the form](#) to other organizations to add it to the **Organization Dashboards** panel.