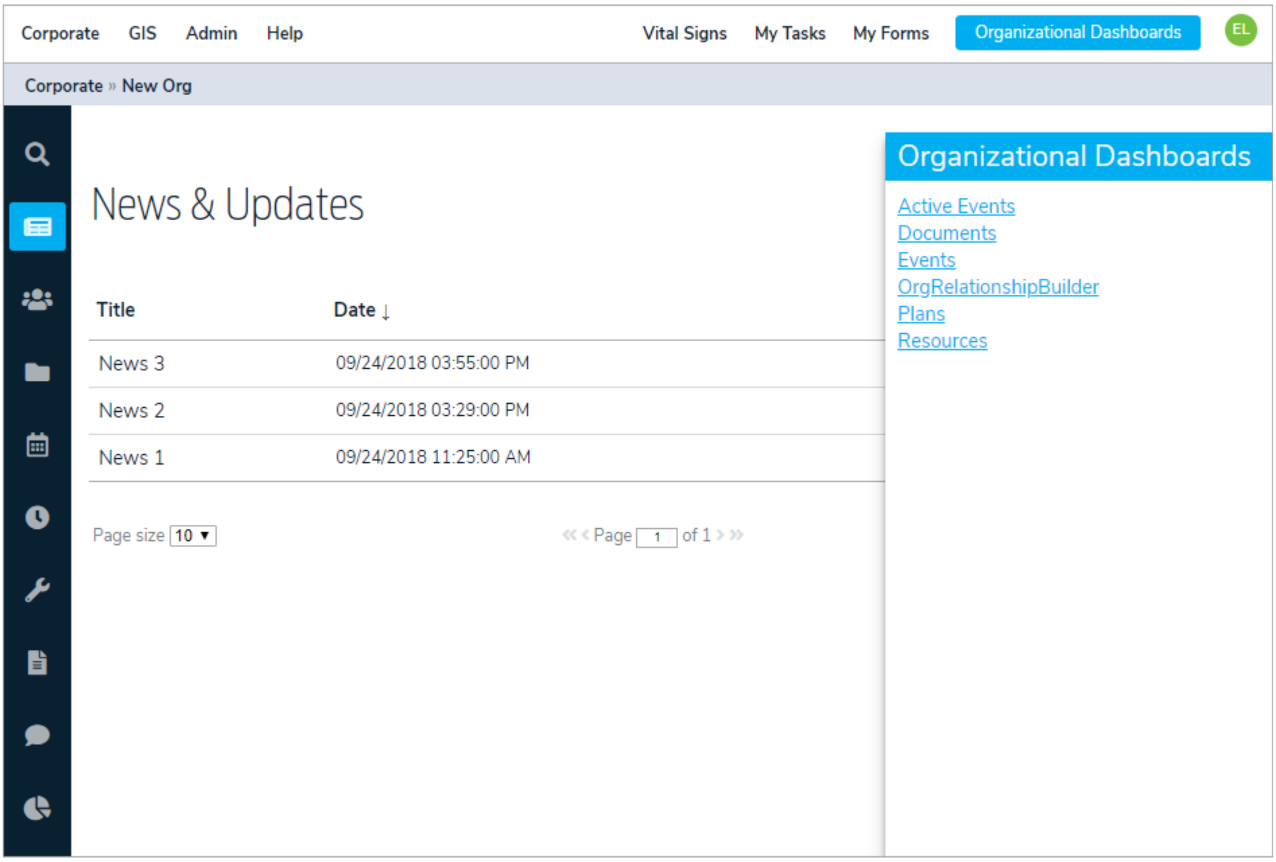
Create an Organizational Dashboard

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.

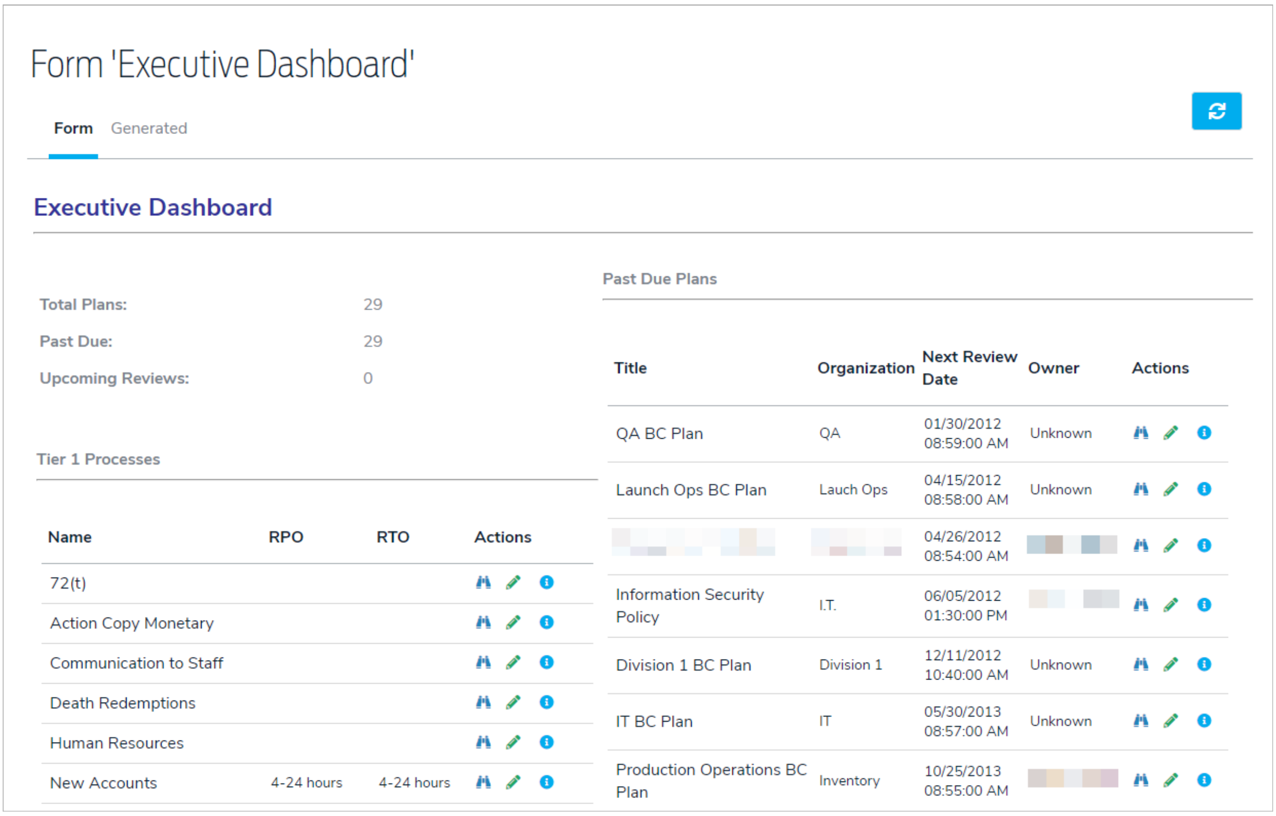
You can access an organizational dashboard any time you're working in the org to which the form has been shared (with the exception of Plans or Events).



The Organizational Dashboards panel.

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

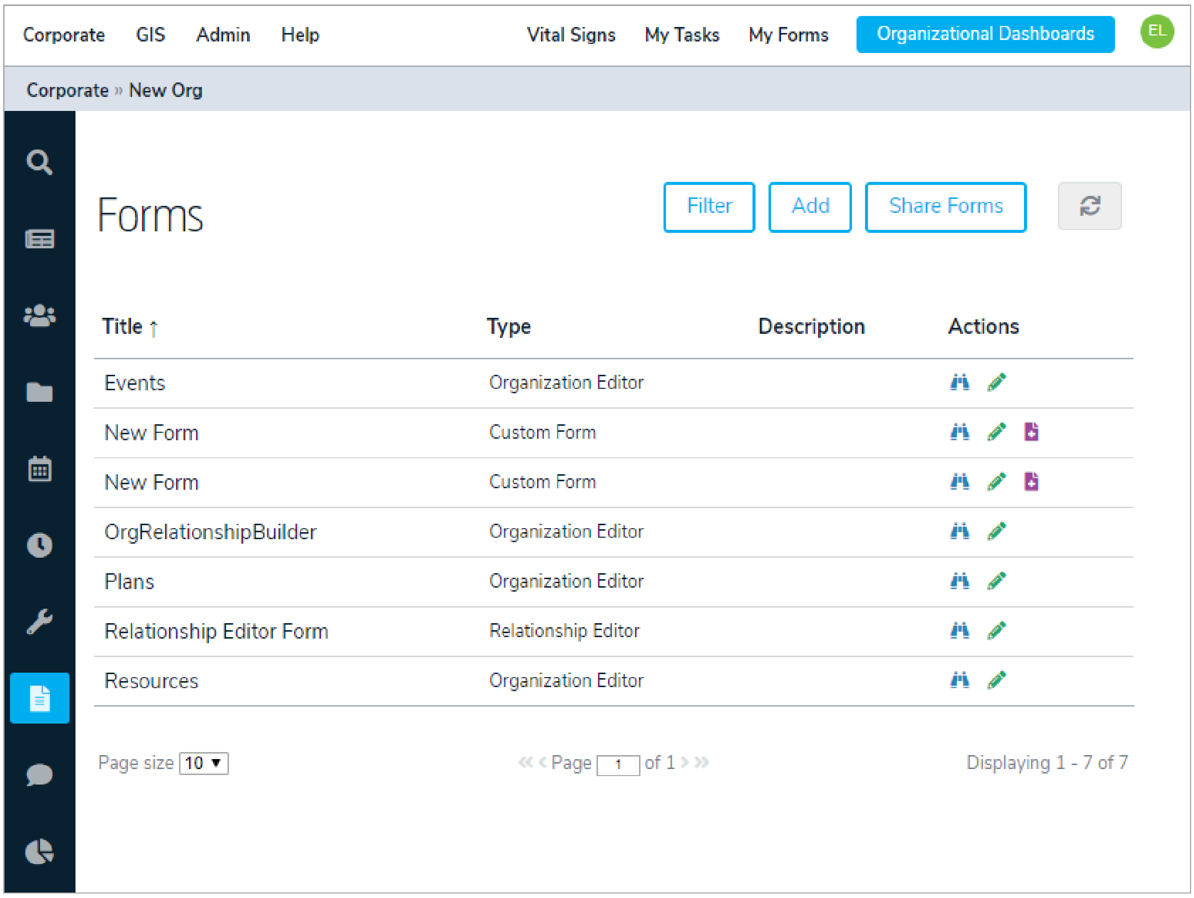
To create an executive dashboard, follow the instructions below, customizing the form as needed and adding the reports that summarize the status of the events, plans, resources, etc. in your organization.



An example of an executive dashboard.

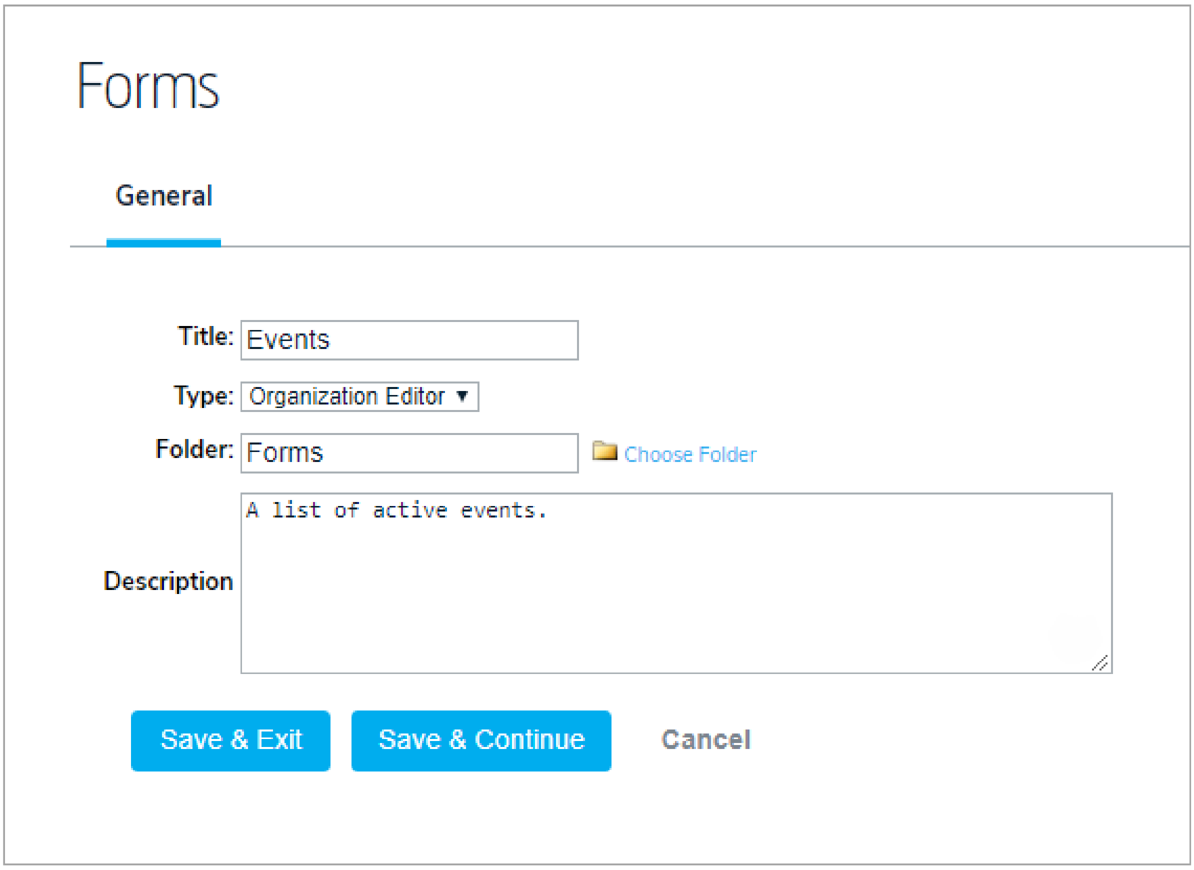
To create an organizational dashboard:

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**.



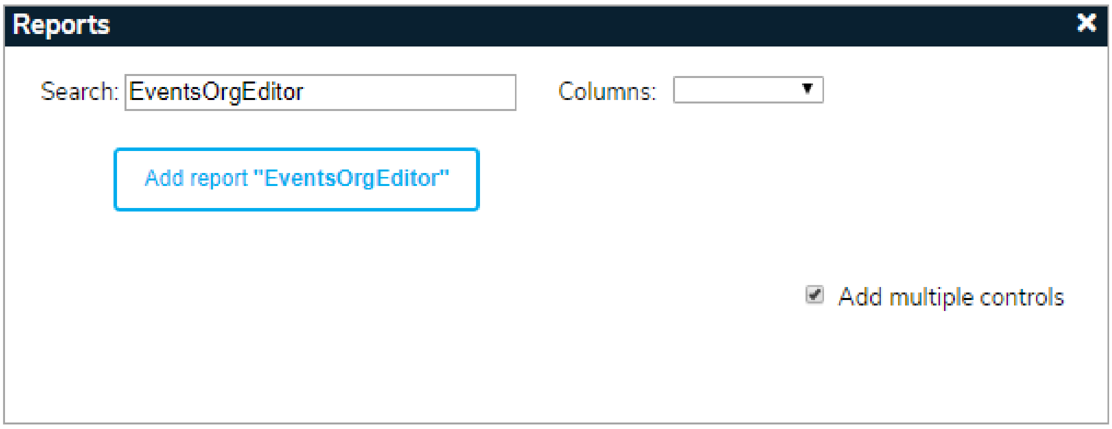
The Forms page.

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.



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.



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**.

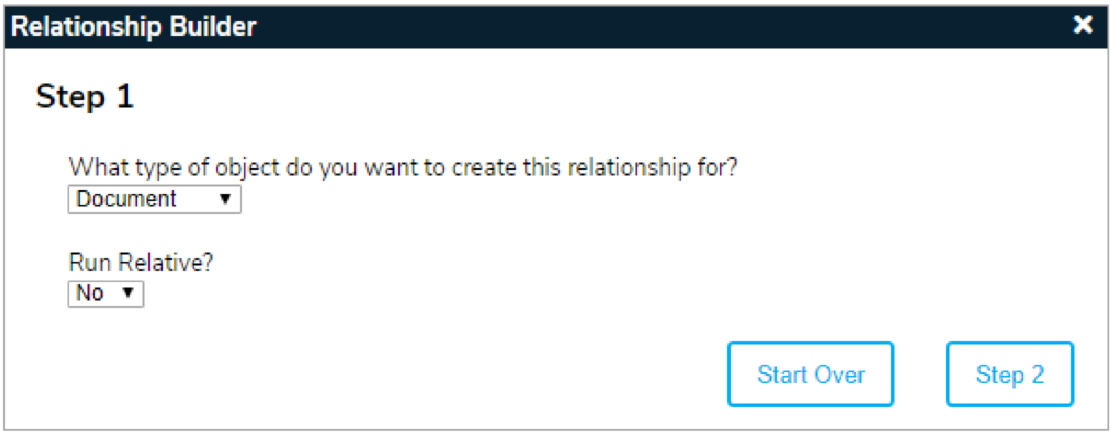
e. Continue steps a. to d. above to add more reports.

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.

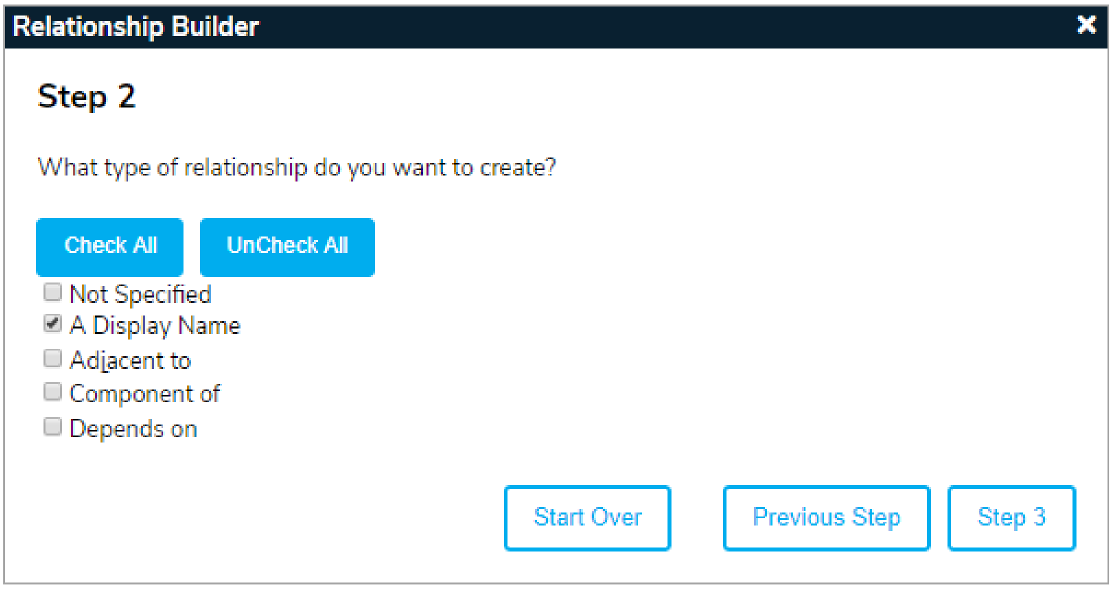
  c. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship for a document object 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.**



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 .

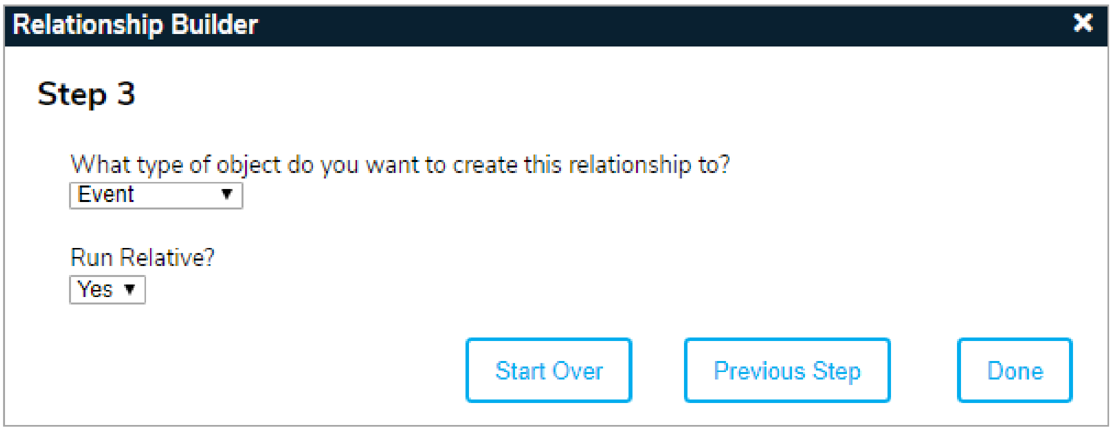


Step 2 of the Relationship Builder.

  f. Click **Step 3**.

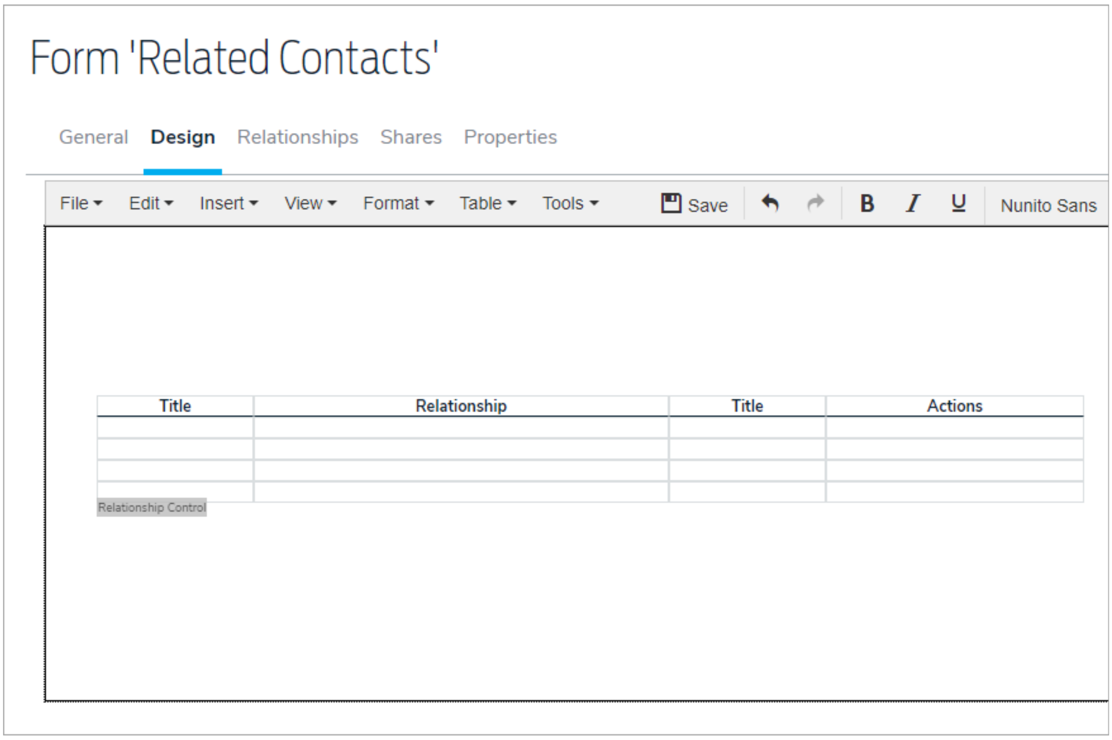
  g. Select the type of object you want to create the relationship to from the dropdown menu.

  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.**



Step 3 of the Relationship Builder.

i. Click **Done**.



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.