

TrackForce Job Aid: How to Create, Access & View Dashboards

OBJECTIVE Train users to create, access and view dashboards

AUDIENCE All Users

INSTRUCTIONS

Pre-Step: Access the TrackForce Homepage via https://va.lightning.force.com/lightning/o/VBA_COS_Tracker_c/list?filterName=Recent

1. Select **Dashboards** in the tabs bar.
2. Select the desired dashboard type on the left-hand side of the page.

Note: Your default dashboard is the OPO Tasker Dashboard.

3. Select the relevant dashboard by typing key words or phrases into the search bar.
4. Click on relevant Dashboard to open. The dashboard will show components containing information from various reports.

Note: Your dashboard will vary depending on your user role in TrackForce.

The screenshot shows the TrackForce Dashboards interface. A red box highlights the 'Dashboards' tab in the top navigation bar (callout 1). Another red box highlights the search bar 'Search recent dashboards...' (callout 3). A third red box highlights the left-hand sidebar menu, specifically the 'Recent' section (callout 2). A fourth red box highlights the 'Dashboard Name' column in the main table, which lists various dashboards like 'OPO Tasker Dashboard' and 'New Dashboard' (callout 4).

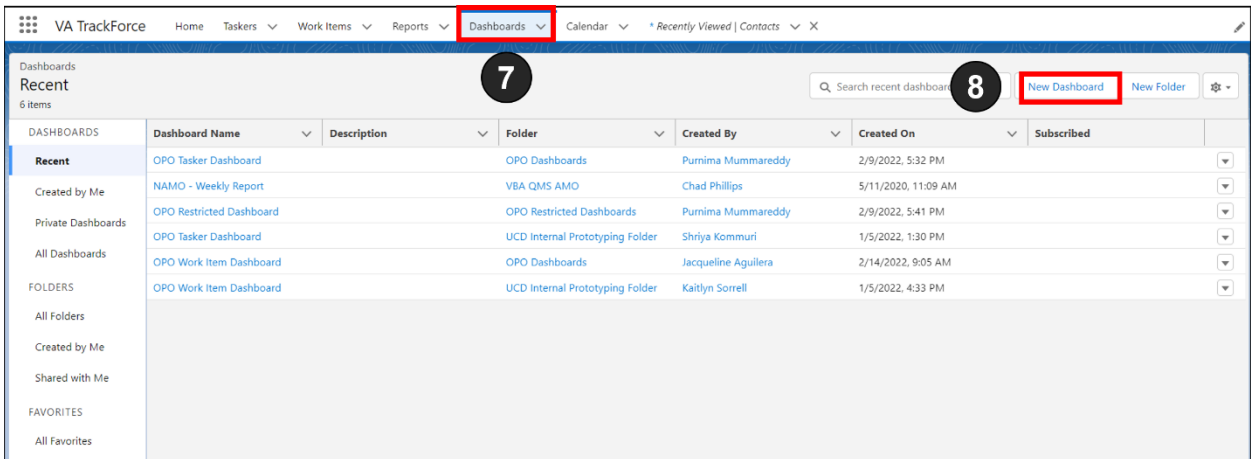
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	OPO Tasker Dashboard		OPO Dashboards	Purnima Mummareddy	2/9/2022, 5:32 PM	
Created by Me	New Dashboard		Private Dashboards	Dayna Ribnikar - OPO Test User	4/21/2022, 10:49 AM	
Private Dashboards	New Dashboard		Private Dashboards	Dayna Ribnikar - OPO Test User	4/21/2022, 10:33 AM	
All Dashboards	NAMO - Weekly Report		VBA QMS AMO	Chad Phillips	5/11/2020, 11:09 AM	
FOLDERS	OPO Restricted Dashboard		OPO Restricted Dashboards	Purnima Mummareddy	2/9/2022, 5:41 PM	
All Folders	OPO Tasker Dashboard		UCD Internal Prototyping Folder	Shriya Kommuri	1/5/2022, 1:30 PM	
Created by Me	OPO Work Item Dashboard		OPO Dashboards	Jacqueline Aguilera	2/14/2022, 9:05 AM	
Shared with Me	OPO Work Item Dashboard		UCD Internal Prototyping Folder	Kaitlyn Sorrell	1/5/2022, 4:33 PM	
FAVORITES						
All Favorites						



- To expand a dashboard component, click on **Expand** following the dashboard title.
- For a more detailed look into the data populating the dashboard component, click on **View Report** at the bottom of a component.



- If a user wants to create a new Dashboard, return to the **Dashboards** tab.
- Click **New Dashboard**.



9. A pop-up window will appear, where the user will be required to enter the name of the Dashboard. The user may enter a description and folder type; however, this is optional to create the dashboard.
10. Click **Create** to continue to the next screen.

9 New Dashboard

* Name

Name the dashboard.

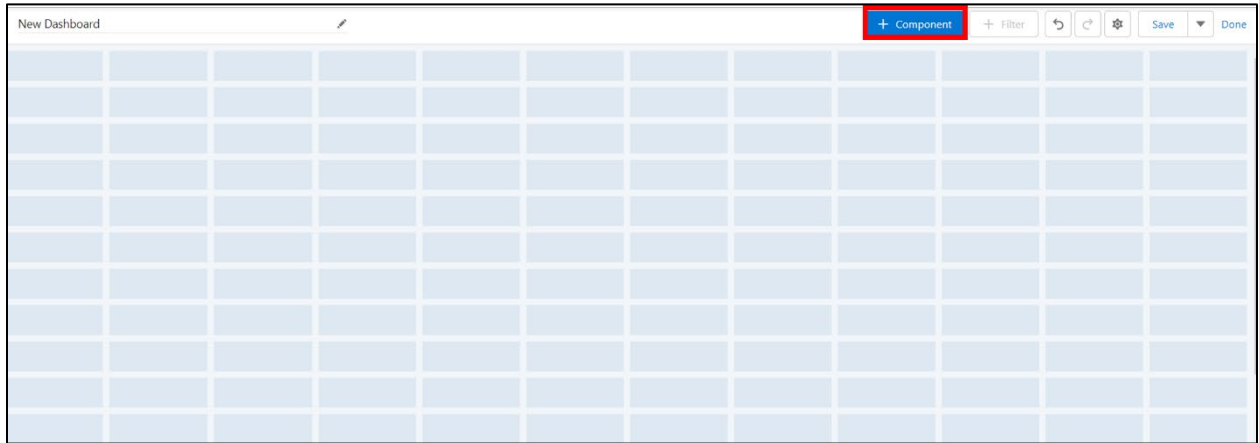
Description

Folder

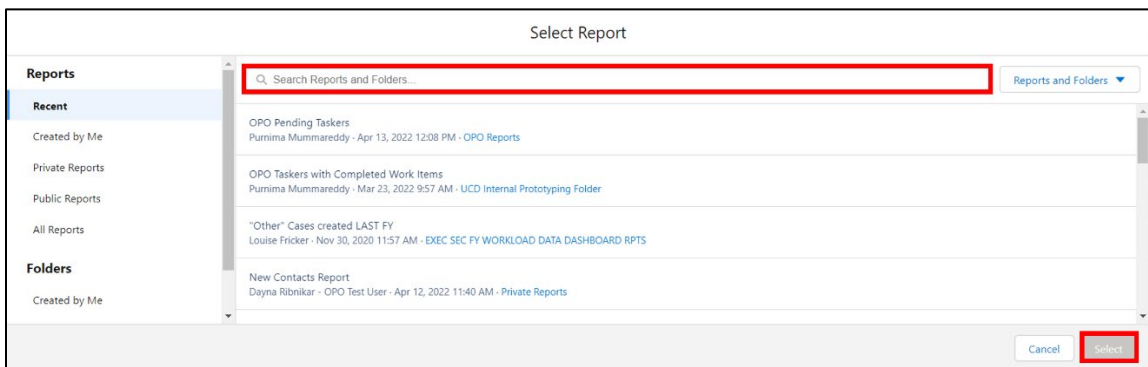
10



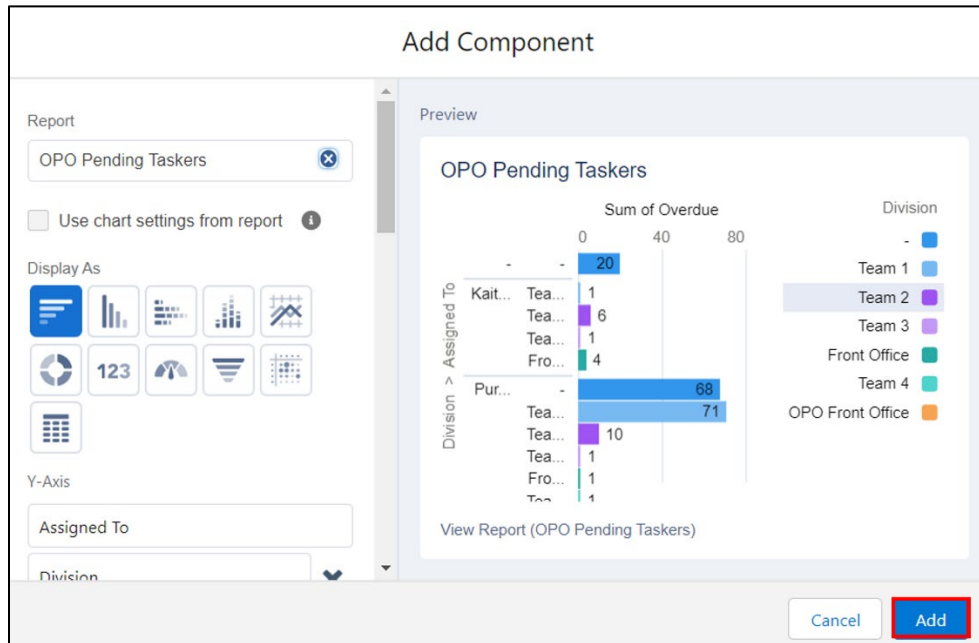
11. On the following screen, users will be able to add components to the dashboard by clicking **+Component**.



a. A pop-up window will appear, where users can search reports and folders in order to add relevant components to the dashboard. Click **Select** to continue.

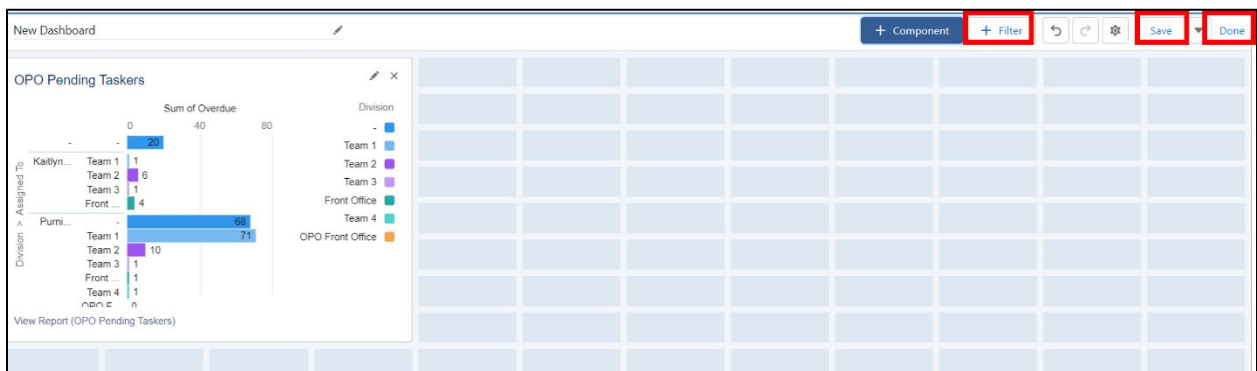


- b. On the following screen, click **Add** to finish adding the component to your new dashboard. The component is now added.



- c. Users can continue to add new components as desired using the same process outlined above.

12. The user has the option to add a filter before saving by clicking **+Filter**. To save your new dashboard, click **Save**, then **Done**. Your new dashboard is now created.



13. Once your new dashboard is created, users can refresh and edit the dashboard as desired by clicking the **Refresh** and **Edit** buttons.

