Create dashboard activities

Activity 1: Create a dashboard

Create a dashboard with only one report in it—"Search Notes in This Project." This is useful for quickly finding any update made on a project, even if there are thousands of updates to search through. This will search into update threads to quickly extract any updates that meet the criteria you specify in the prompts.

Create this report by making a copy of the "Search Notes" report you created in the "Create a note report" activity (or use another report if you didn't do that activity).

- Remove the Project Name prompt from the copy and rename the report "Search Notes in This Project."

- Name the Dashboard "Search Notes."

- Go to any project landing page and create a custom section for a dashboard.

- Note that when you search for notes in your custom section it will only show notes contained within the project you're currently in.

Answer 1

1. Run the report you created in the "Create a note report" activity.

2. Click **Report Actions** and select **Copy**. Workfront creates a new report named "Note Search (Copy)."

3. Go to **Report Actions** and select **Edit**. Click **Report Settings** and change the name to "Search Notes in This Project."

4. Click Report Prompts and delete the Project > Name prompt from the list.

5. Check the **Show Prompts in Dashboard** box.

6. Click **Done**, then **Save + Close**. You now are looking at the Prompts screen of the report.

Next you're going to use a shortcut to create a new dashboard and add this report to it.

7. Click **Report Actions** and select **Add to Dashboard** > **New Dashboard**.

8. Drag the report "Search Notes in This Project" to the **Layout** panel.

9. Notice that the name of the report becomes the name of the dashboard. Edit the name to just "Search Notes."

New Dashboard

Dashboard Details

Name

Search Notes

Description

Available Reports & Calendars
Built-in, public, and viewable private reports and calendars

All   Reports   Calendars

🔍 Search Notes in this Project

Select Layout / Add Reports / Add Calendars

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⠿ **Search Notes in this Project**

+ Add External Page

Save + Close   Cancel

10. Click **Save + Close**.

Now add the dashboard to a project page.

11. Go to any project. From the left panel menu, click the **Add custom section** icon.

12. In the **Add a Dashboard** field, type "Search Notes" and select the dashboard from the list.

13. In the **Custom section title** field, type in "Search Notes."

14. Click **Add new section**.

15. From the left panel menu, find Search Notes. Click the dots to the left of the section name and drag it right below Updates.