Dashboard: how-to guide

IntraSync
November 21, 2026

Dashboard gives every hub a first screen of figures, charts, lists and shortcuts, and lets each person build, arrange and share boards of their own. Plant managers, planners and supervisors use it to see what needs attention at a glance.

> *Written for: Plant manager, Planner, Production supervisor, Administrator.*

> *In the pictures, a numbered red box marks where to click or type. Where a picture has more than one box, the numbers give the order.*

In this guide

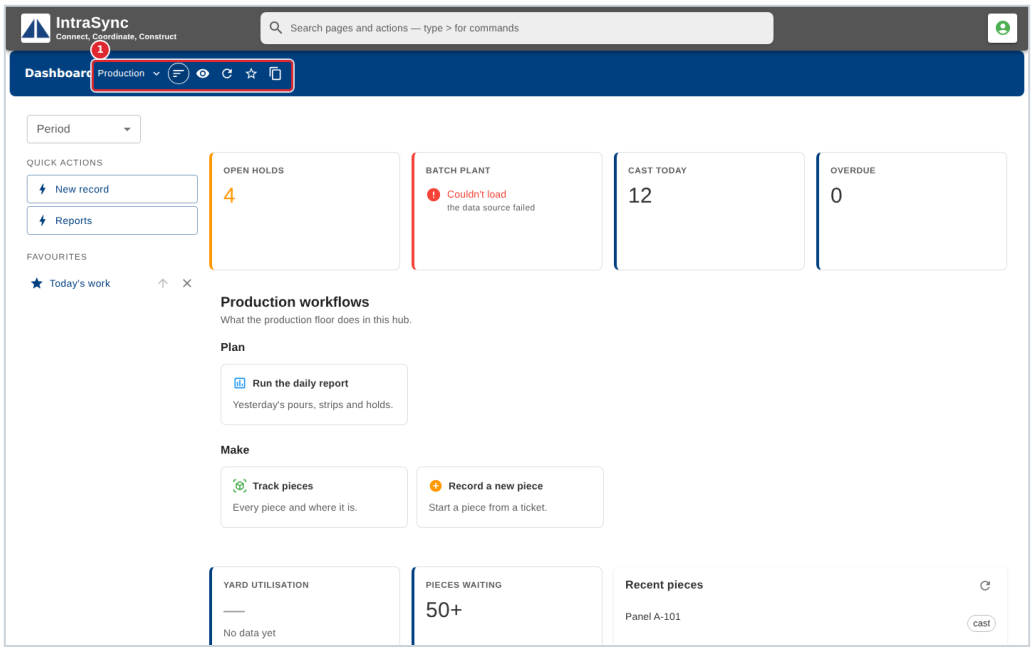
- 1. Read your board
- 2. Choose the period the board shows
- 3. Switch to another board
- 4. Find every board you can open
- 5. Create a board of your own
- 6. Hide widgets you do not need
- 7. Sort, refresh and keep a board as your default
- 8. Move and resize widgets
- 9. Add a widget to a board
- 10. Change or remove a widget
- 11. Set the order of the widgets
- 12. Share a board
- 13. Change a board's settings
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1. Read your board

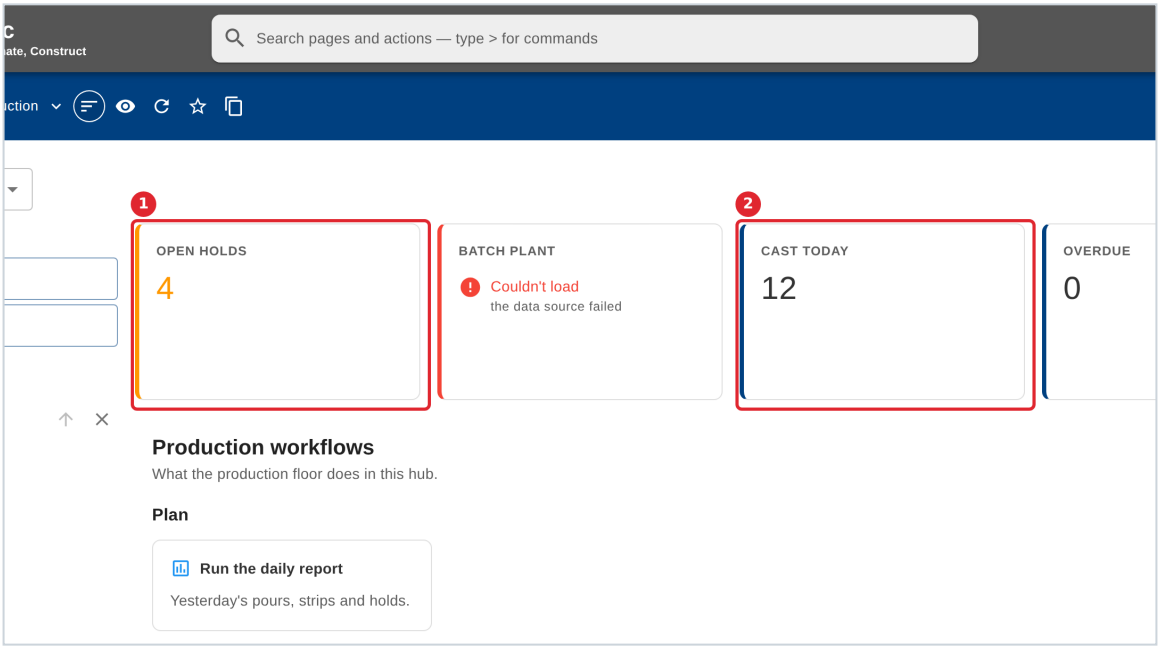
See the figures, work and shortcuts that matter to you on one screen, and know which figures you can rely on.

Before you start:

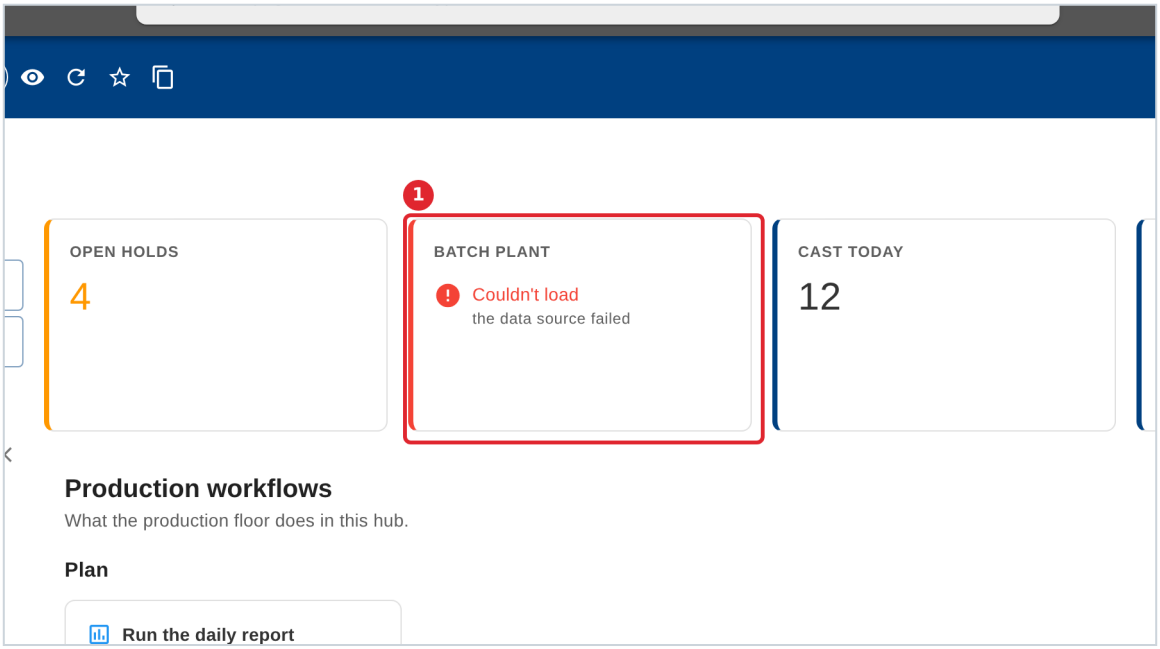
– You need access to Dashboard. Your administrator sets which boards you can see.



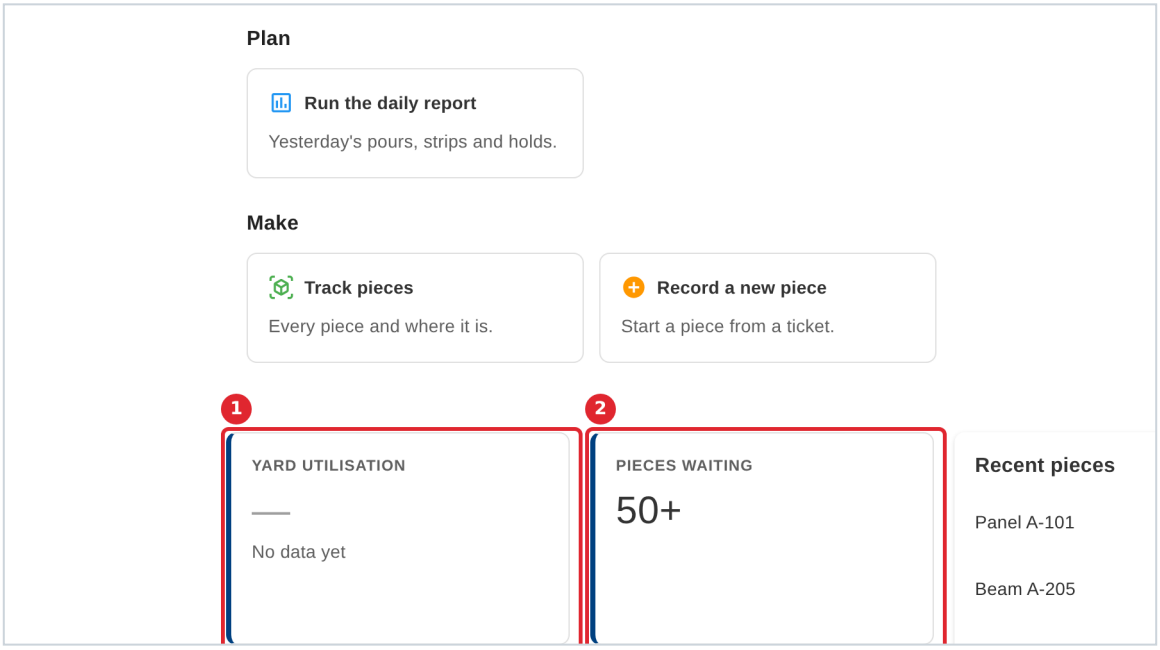
Step 1. Open Dashboard. Your hub board opens first.



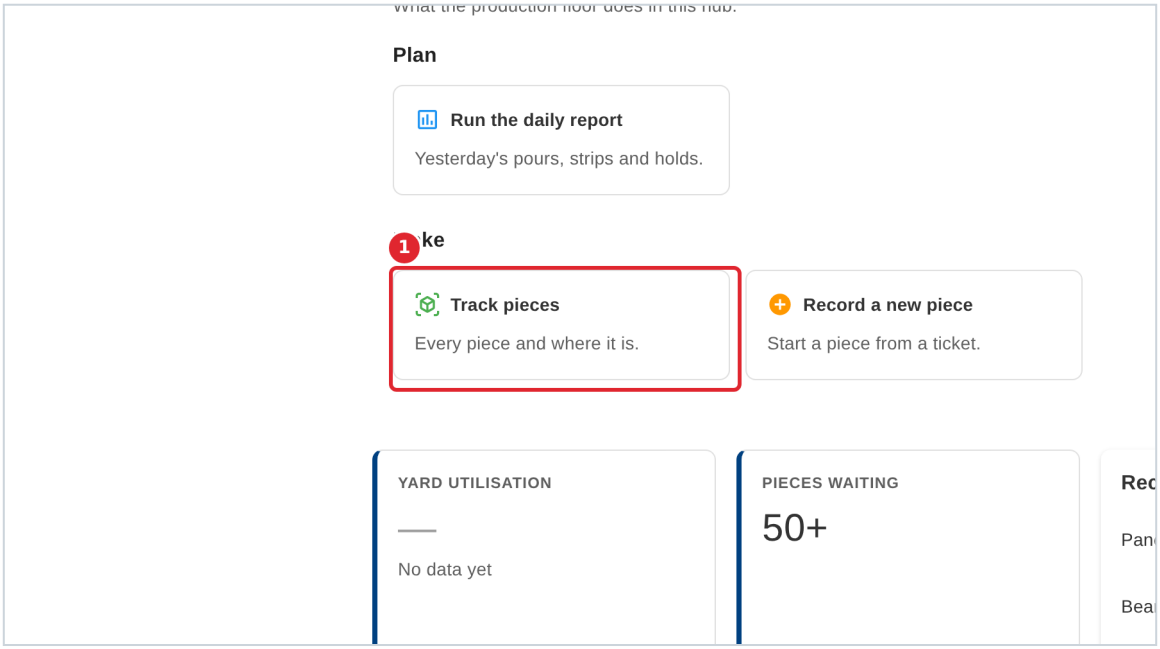
Step 2. Read the figure tiles across the top of the board.



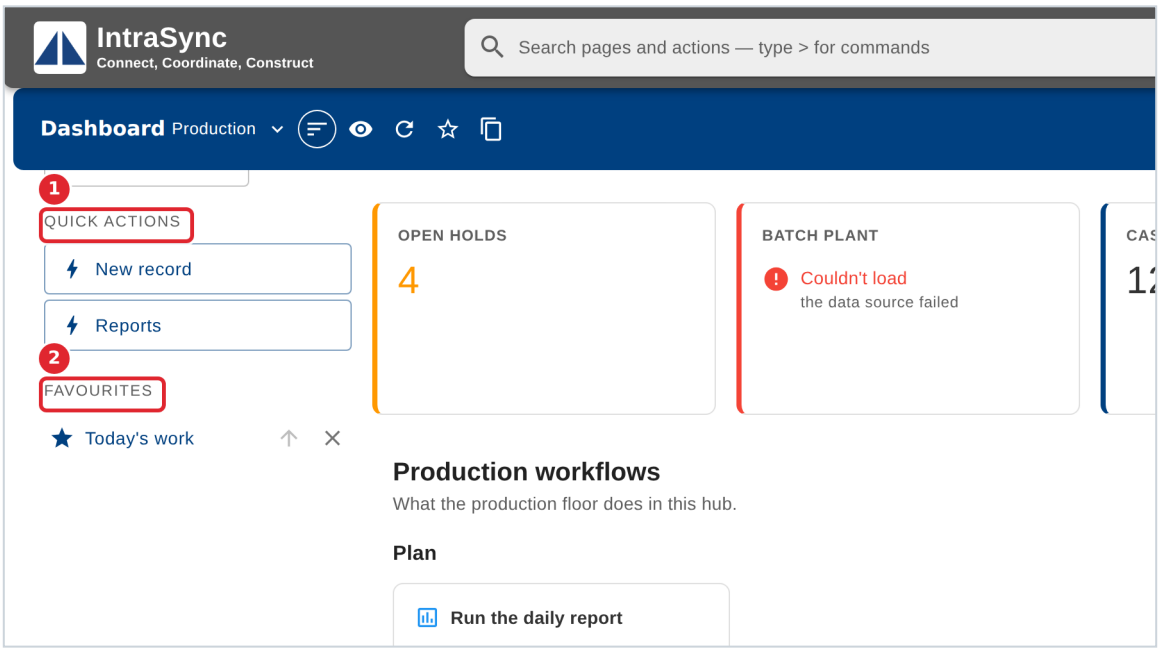
Step 3. A tile that says Couldn't load could not reach its source. It never shows zero in its place.



Step 4. A dash means the figure is not measured yet. A number followed by a plus sign means there are at least that many.



Step 5. Select a workflow card to go straight to that step of the work.



Step 6. Use Quick actions and Favourites on the left for the things you do most.

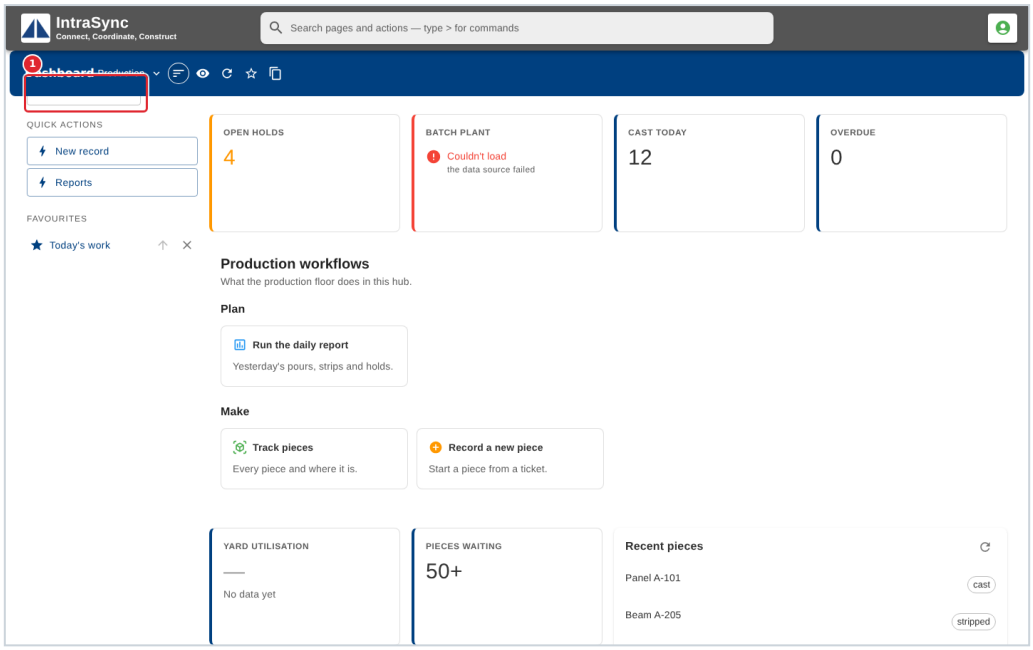
Tips:

- A tile never shows zero when it could not get its figure. Couldn't load means the source did not answer; try Refresh, and tell your administrator if it stays.
- A dash means nothing has been measured yet. It is not the same as zero.

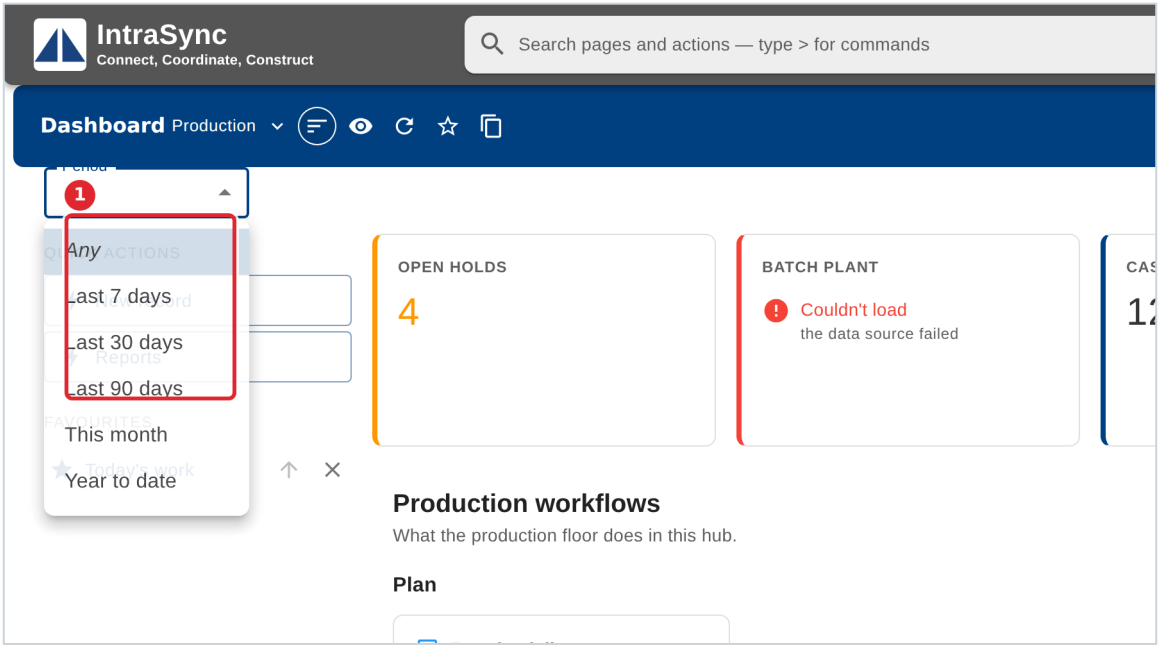
This is shown in the Dashboard video at 0:03.

2. Choose the period the board shows

Look at the same board over the last week, month, quarter or year without changing it for anyone else.



Step 1. Select the Period list above the board.



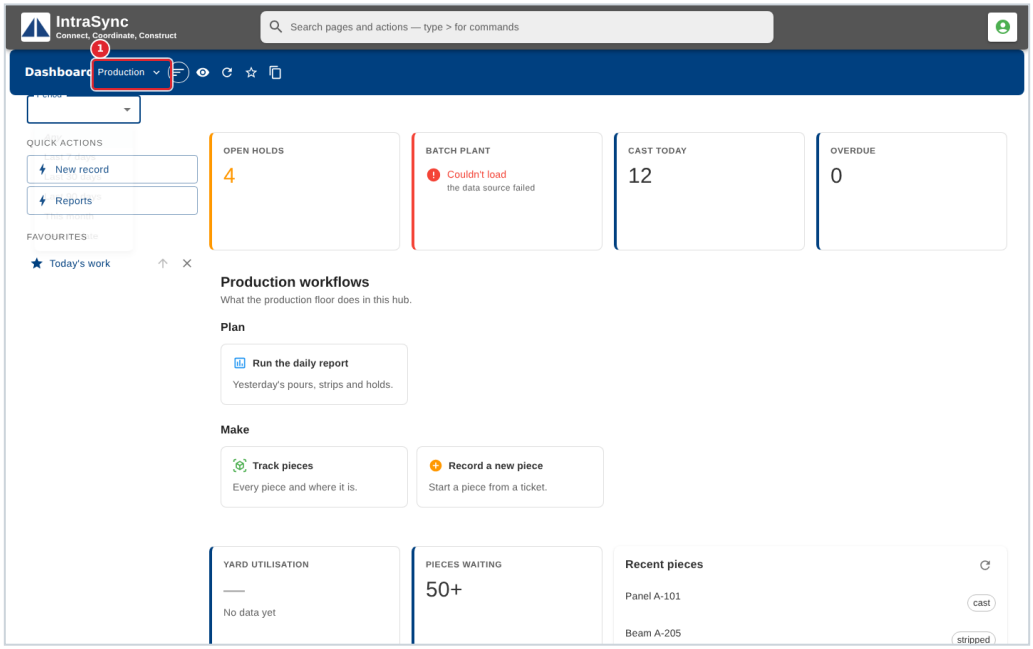
Step 2. Choose the period. Every widget on the board follows it, and the board remembers your choice.

Tips:

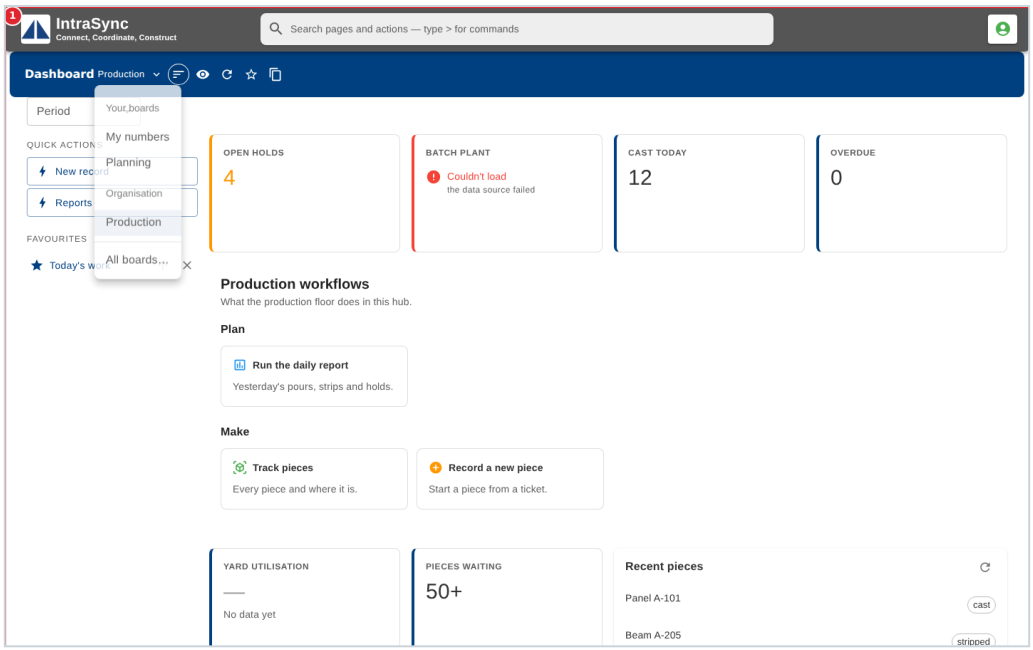
– Your choice is kept for you on this board, so it is still set the next time you open it.

3. Switch to another board

Move between the boards you can see without leaving Dashboard.



Step 1. Select the board name in the header.

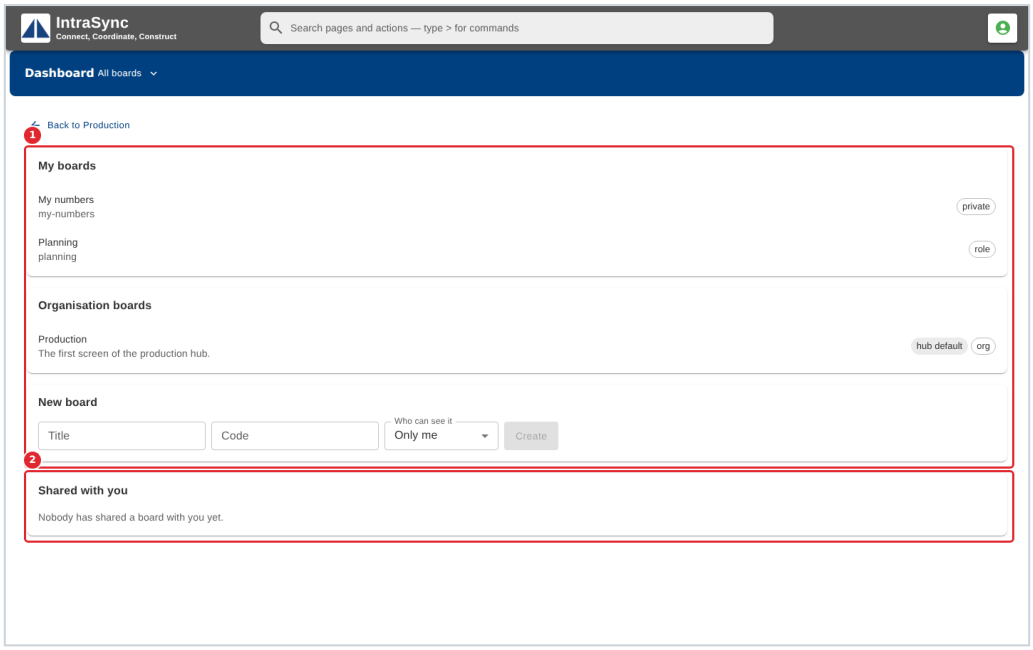


Step 2. Choose a board from Your boards or Organisation.

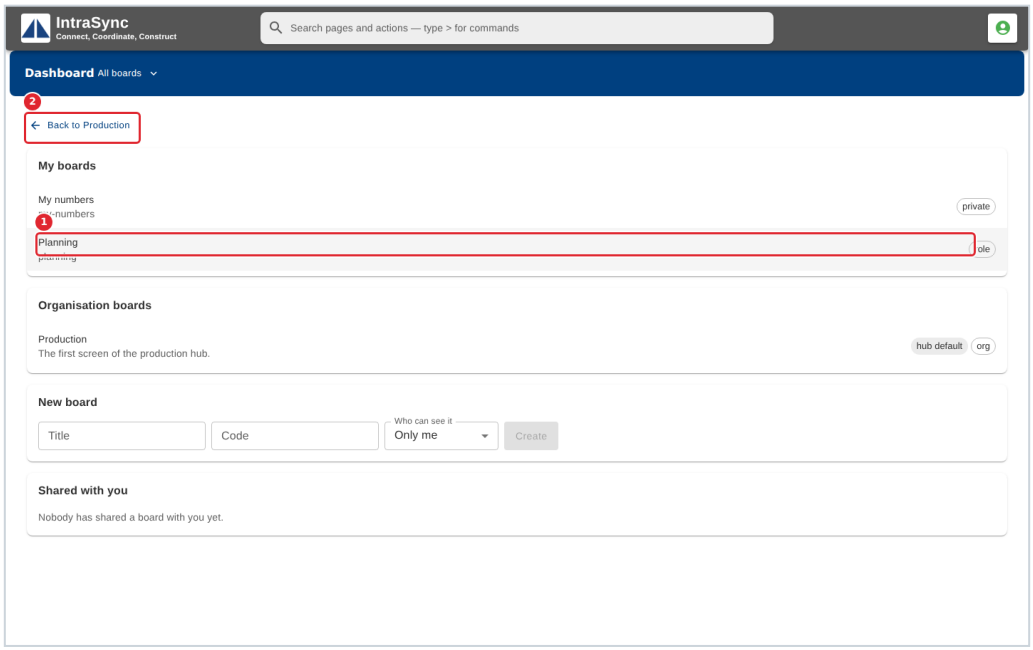
This is shown in the Dashboard video at 0:20.

4. Find every board you can open

See your own boards, your organisation's boards and the boards others have shared with you, in one list.



Step 1. Select the board name, then All boards. The page lists your boards, your organisation's boards and the boards shared with you.



Step 2. Select a board in the list to open it, or select Back to return to the board you came from.

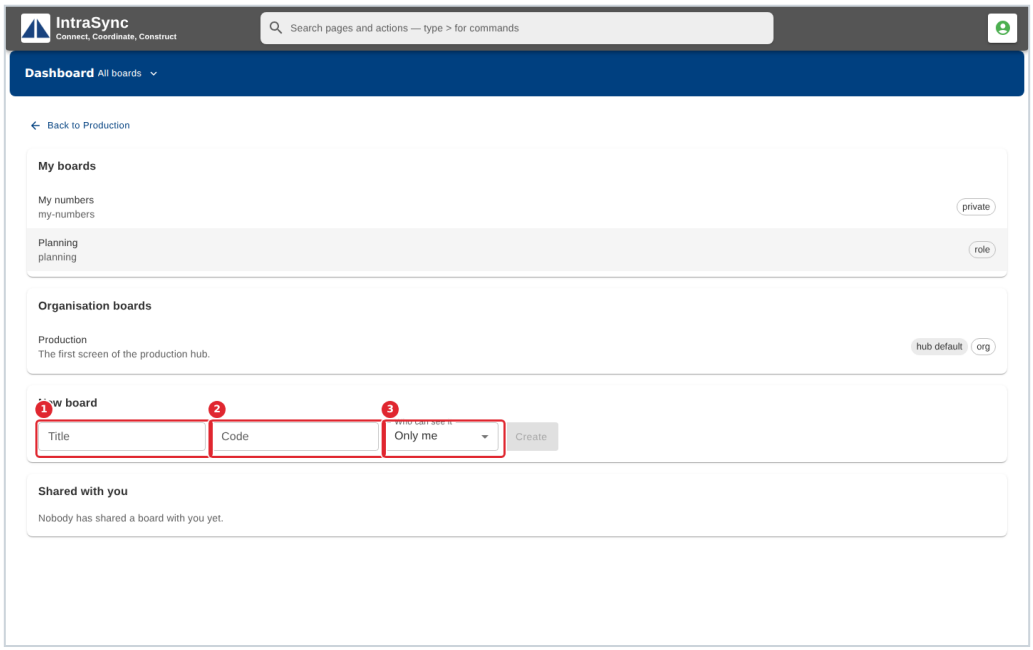
This is shown in the Dashboard video at 0:26.

5. Create a board of your own

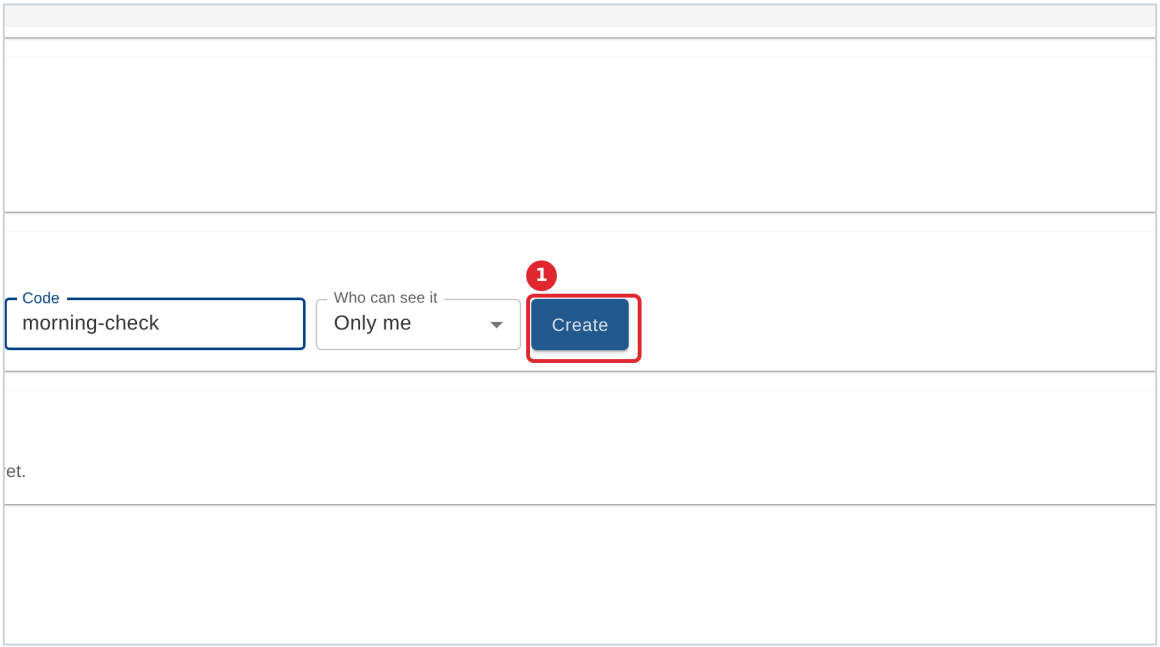
Start a board for the figures you check every day.

Before you start:

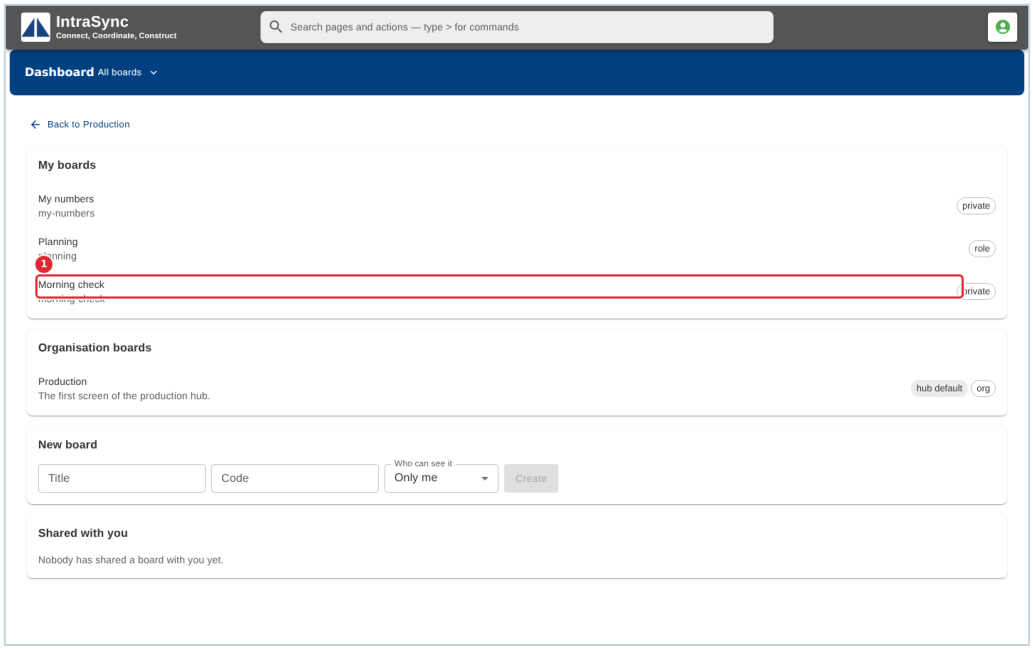
– Anyone can create a private board. A board for the whole organisation needs permission to manage organisation boards.



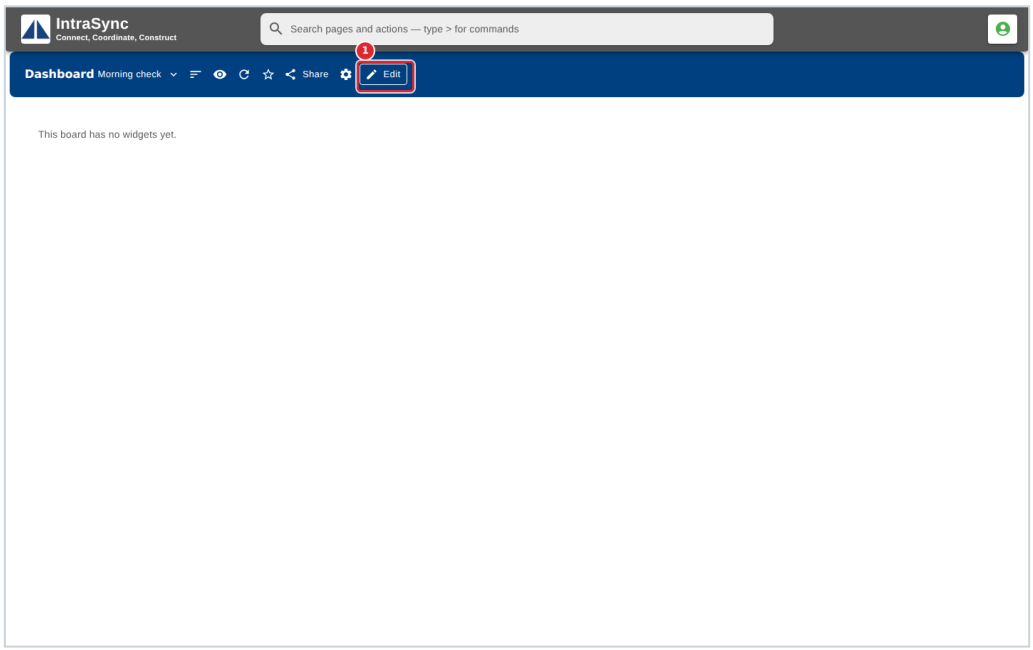
Step 1. Under New board, type a Title and a short Code, and choose Who can see it.



Step 2. Select Create.



Step 3. The new board appears under My boards. Select it to open it.



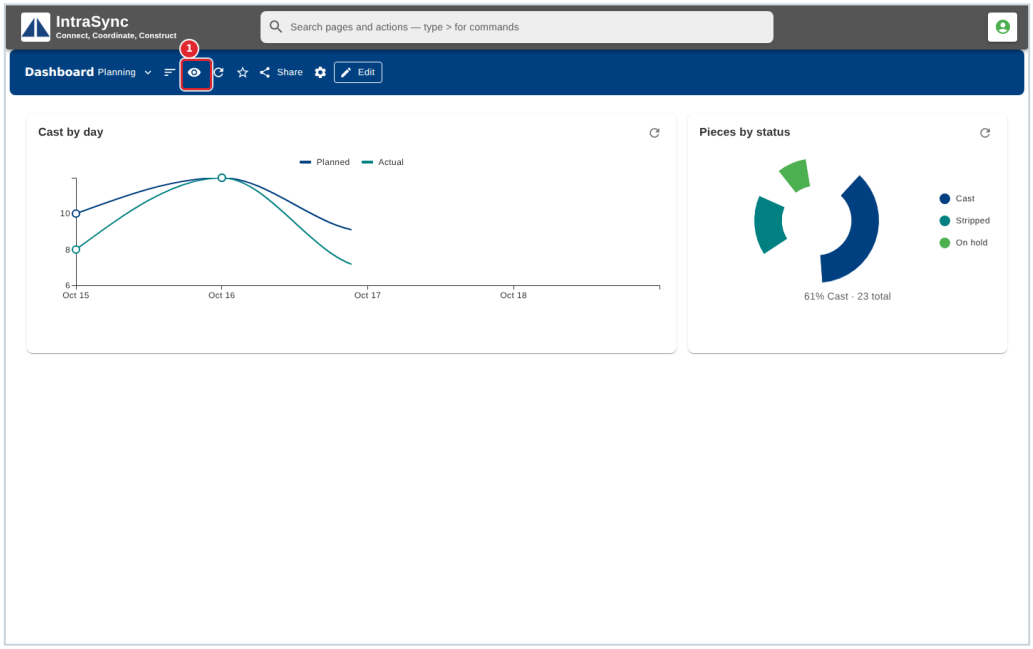
Step 4. The board opens empty. Select Edit to start adding widgets.

Tips:

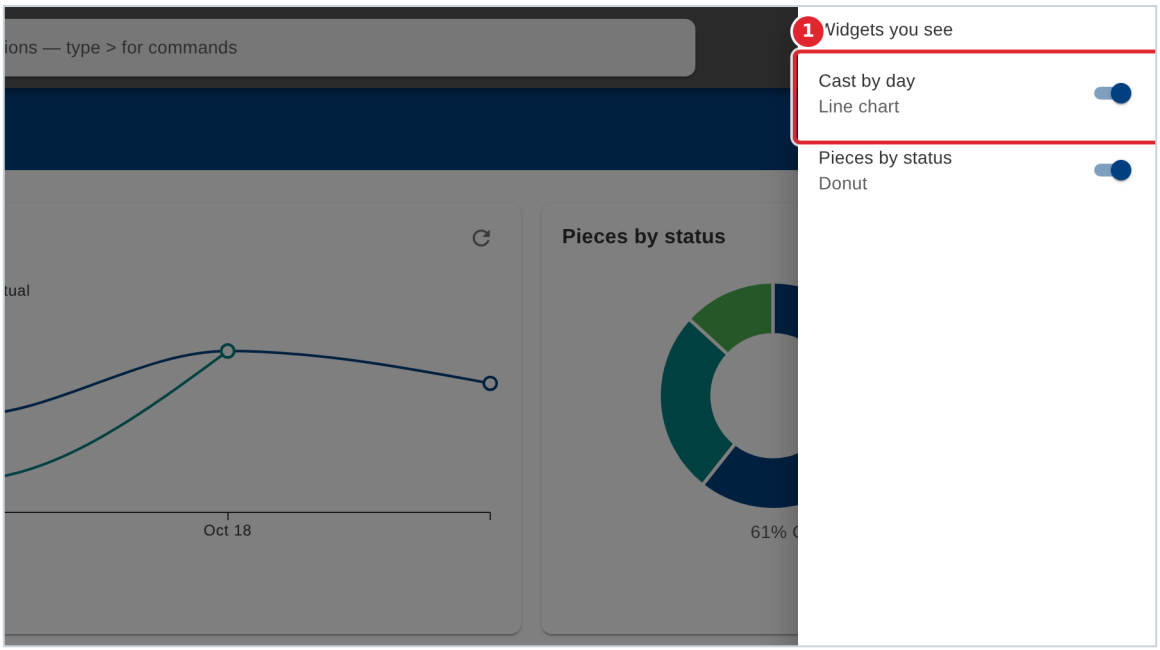
- The Code accepts letters, digits, dots, dashes and underscores only; anything else is left out as you type.
- Create stays unavailable until the board has a Title and a Code.

6. Hide widgets you do not need

Keep a shared board focused on your own work without changing what anyone else sees.



Step 1. Select Widgets you see in the header.



Step 2. Turn a widget's switch off to hide it for yourself. Others still see it.

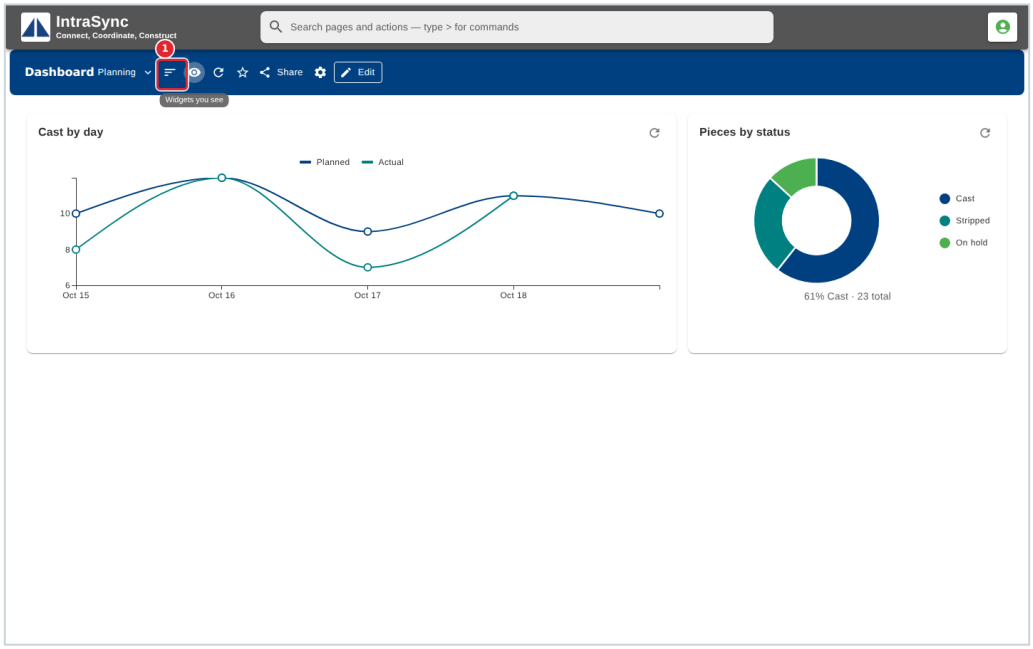
Tips:

– To hide a widget for everyone instead, edit the board and use Order & visibility.

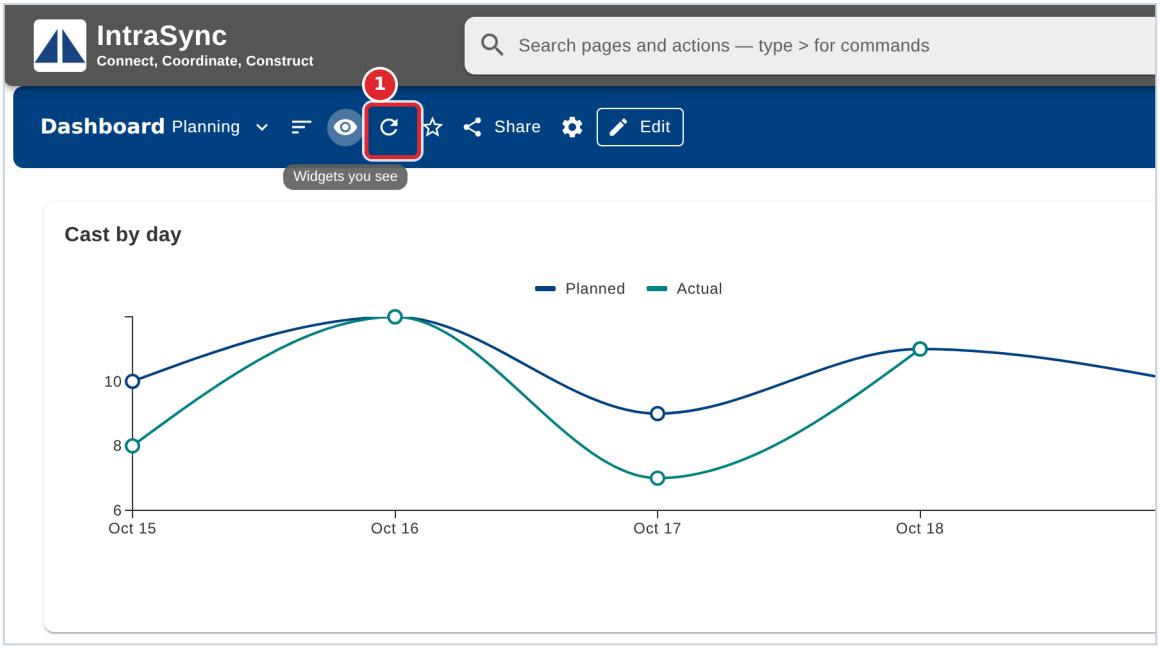
This is shown in the Dashboard video at 0:35.

7. Sort, refresh and keep a board as your default

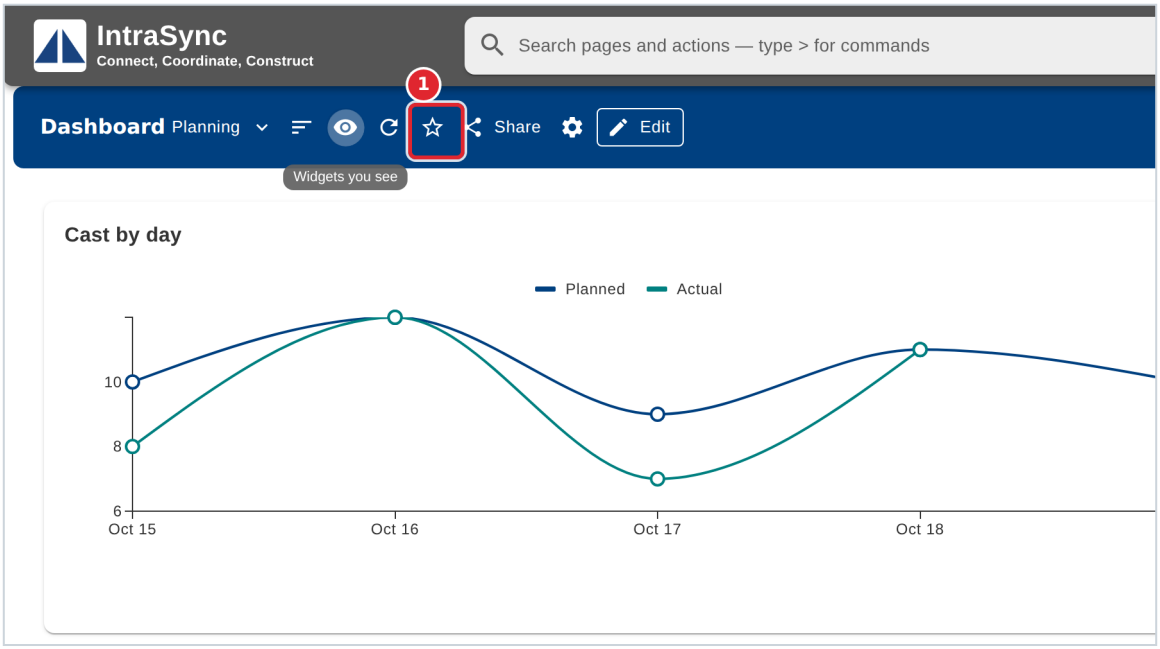
Put what needs attention first, get the latest figures, and open on the board you use most.



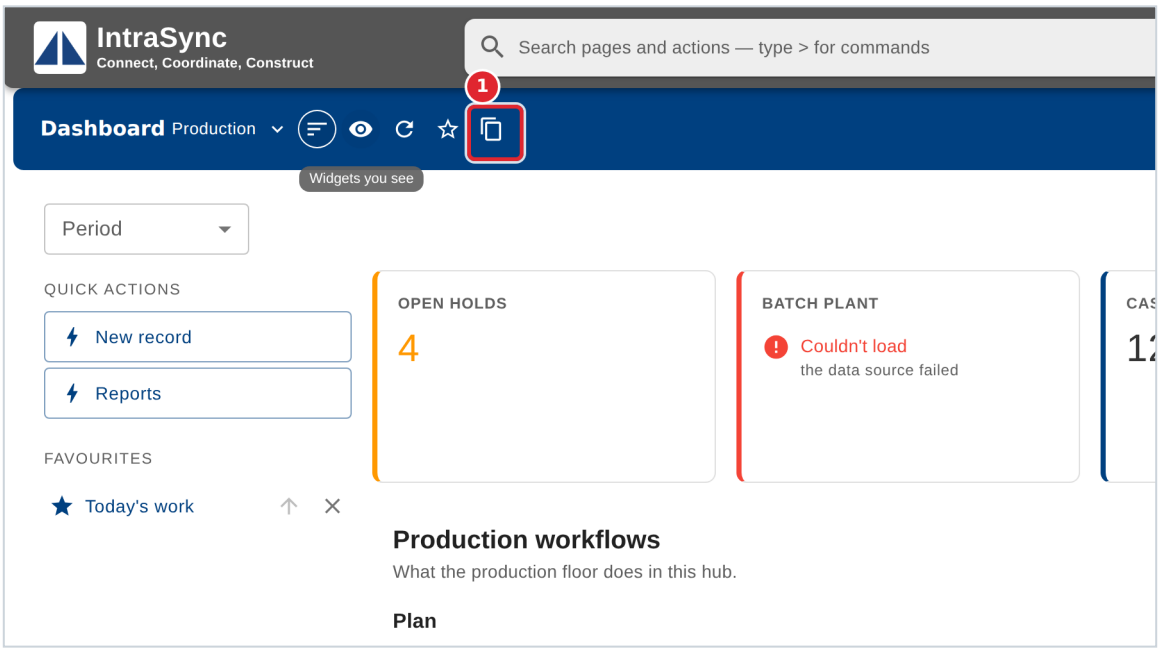
Step 1. Select Worst first to put the widgets that need attention at the top.



Step 2. Select Refresh to load every widget again.



Step 3. Select the star to make this board the one that opens first for you. Select it again to stop.



Step 4. On a board you may only read, select Make my own copy to get a board of your own to change.

Tips:

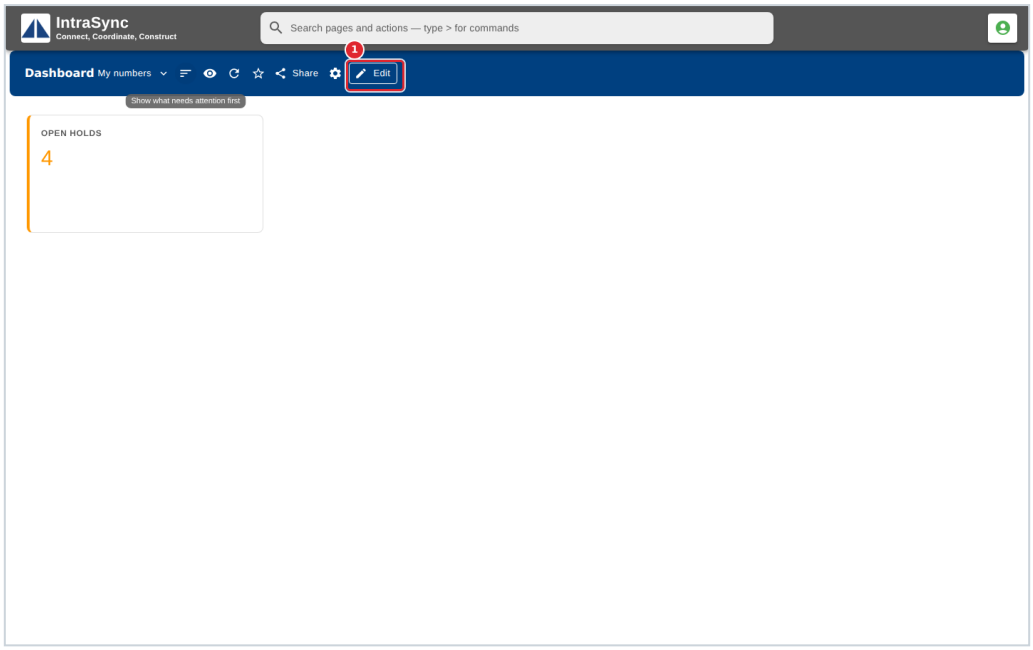
– Make my own copy gives you a board you can change freely; the original stays as it was.

8. Move and resize widgets

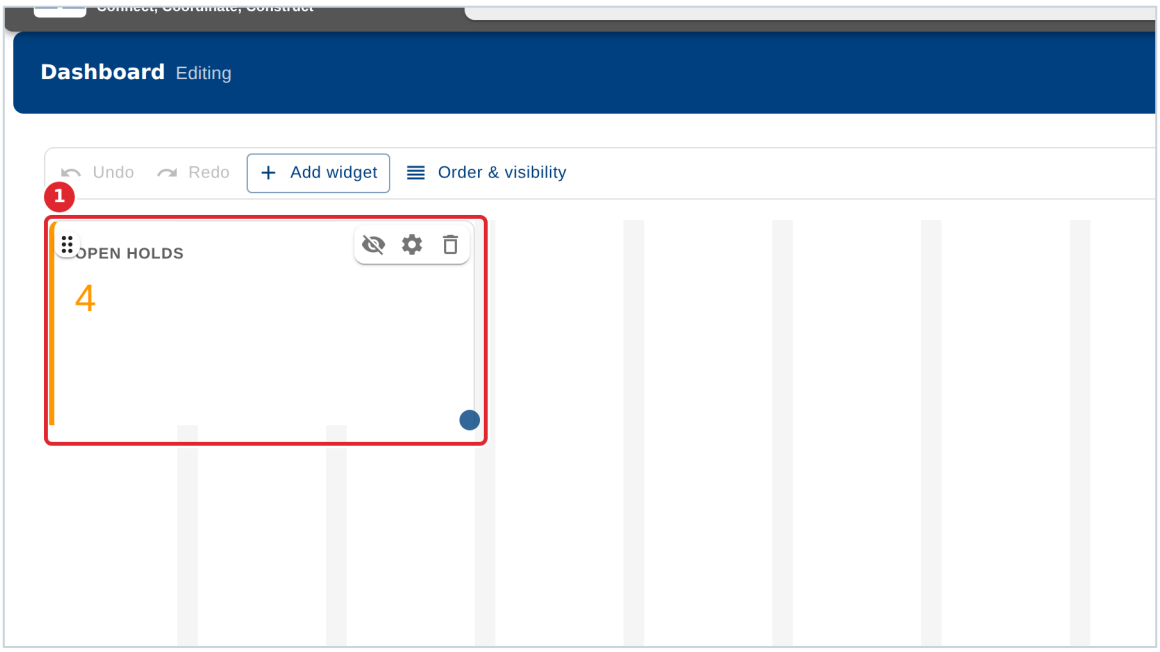
Lay the board out the way you read it.

Before you start:

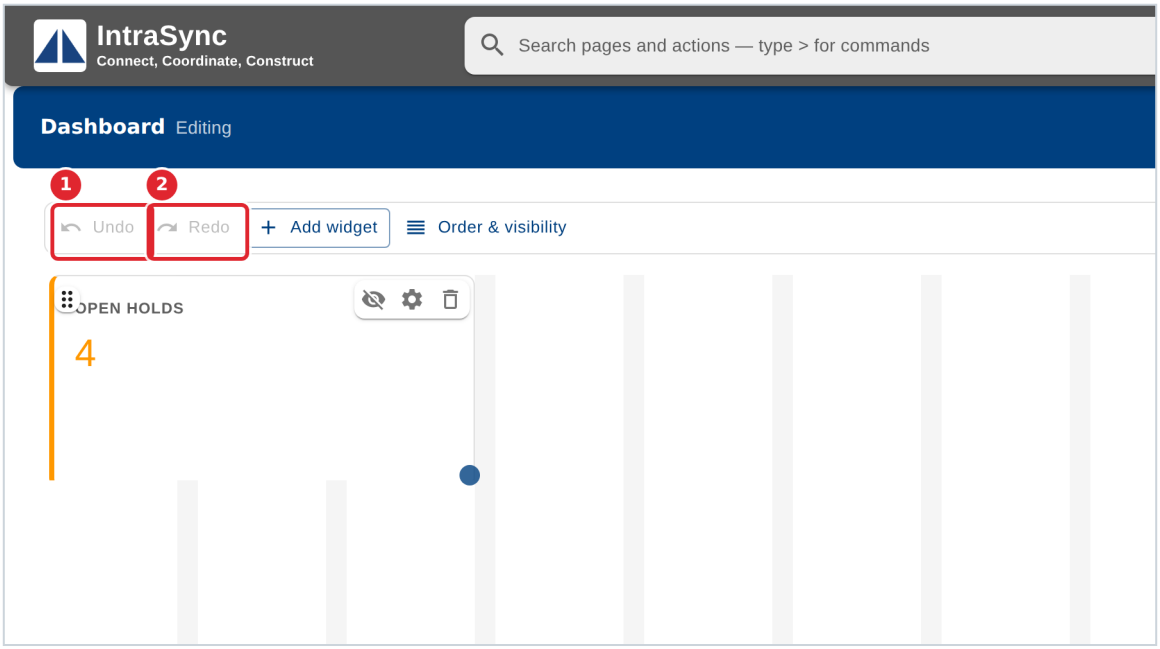
– You can edit your own boards, and boards shared with you for editing.



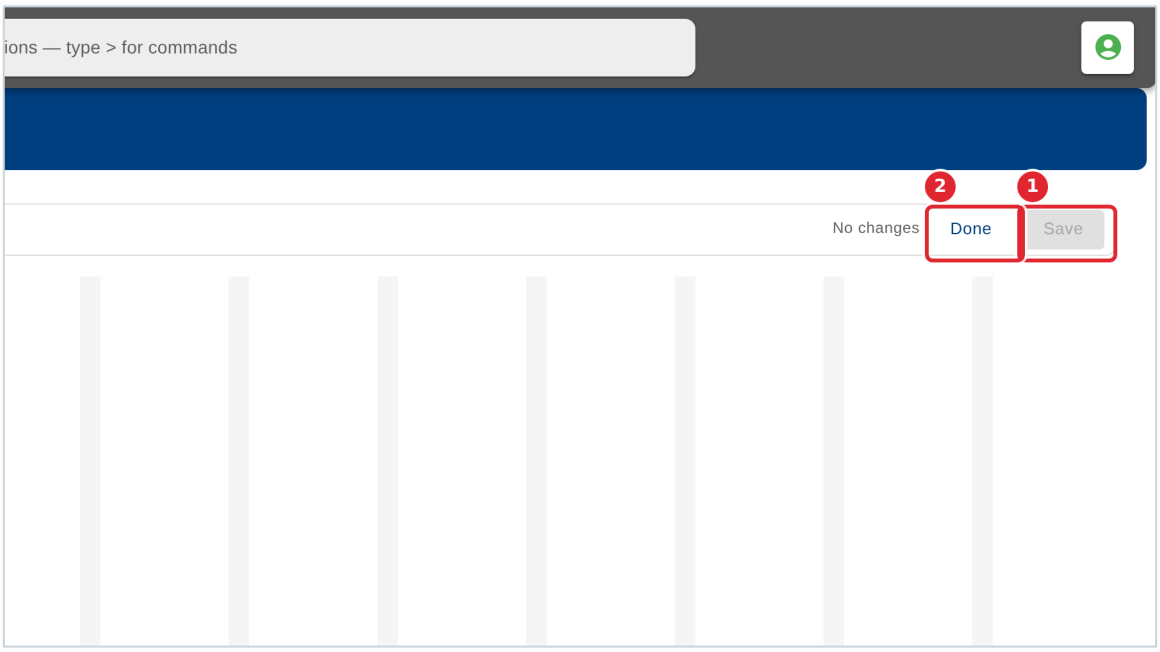
Step 1. Open a board you may change, then select Edit.



Step 2. Drag a widget to move it, and drag its lower right corner to resize it.



Step 3. Use Undo and Redo to step back and forward through your changes.



Step 4. Select Save to keep your changes. Beside it, Done closes the editor when nothing has changed; once something has, it reads Discard and leaves the board as it was.

Tips:

– Nothing is saved until you select Save. If you leave without saving, the board stays as it was.

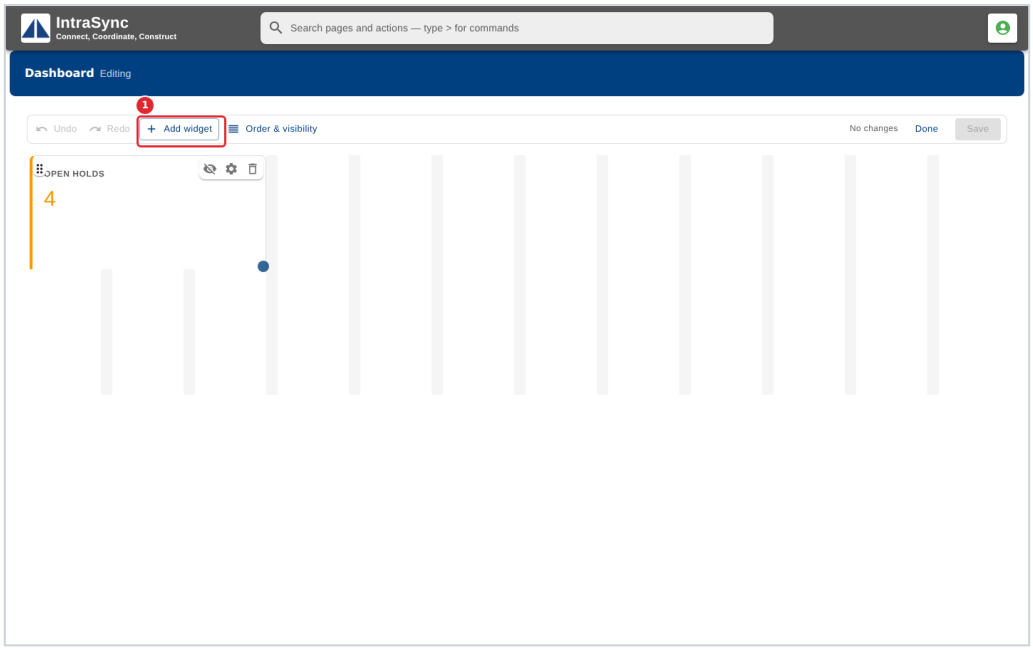
This is shown in the Dashboard video at 0:43.

9. Add a widget to a board

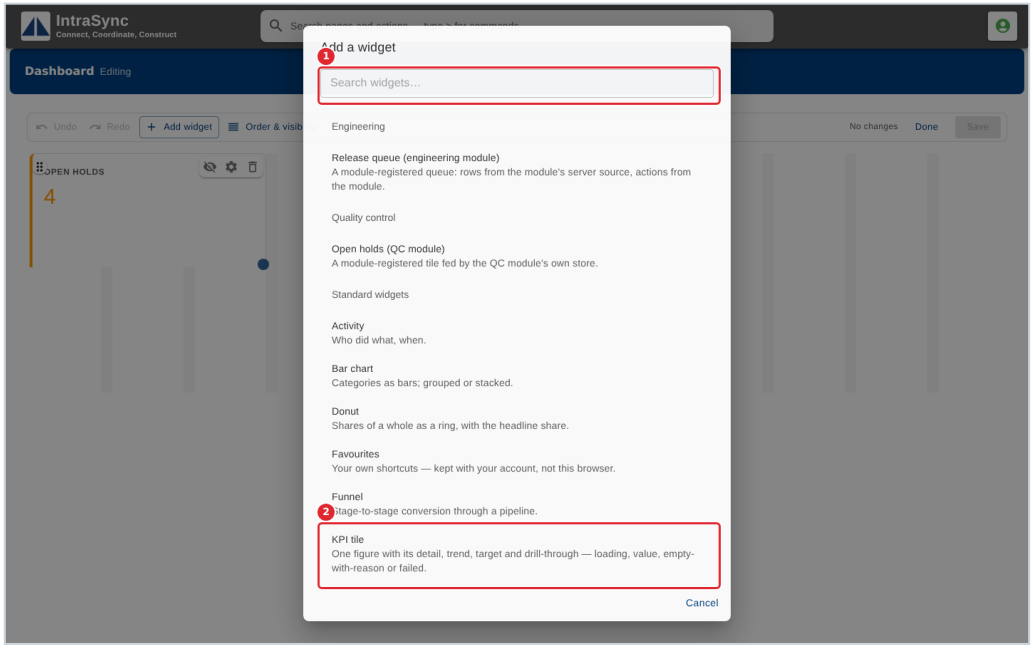
Put a figure, chart, list or table from your modules on the board.

Before you start:

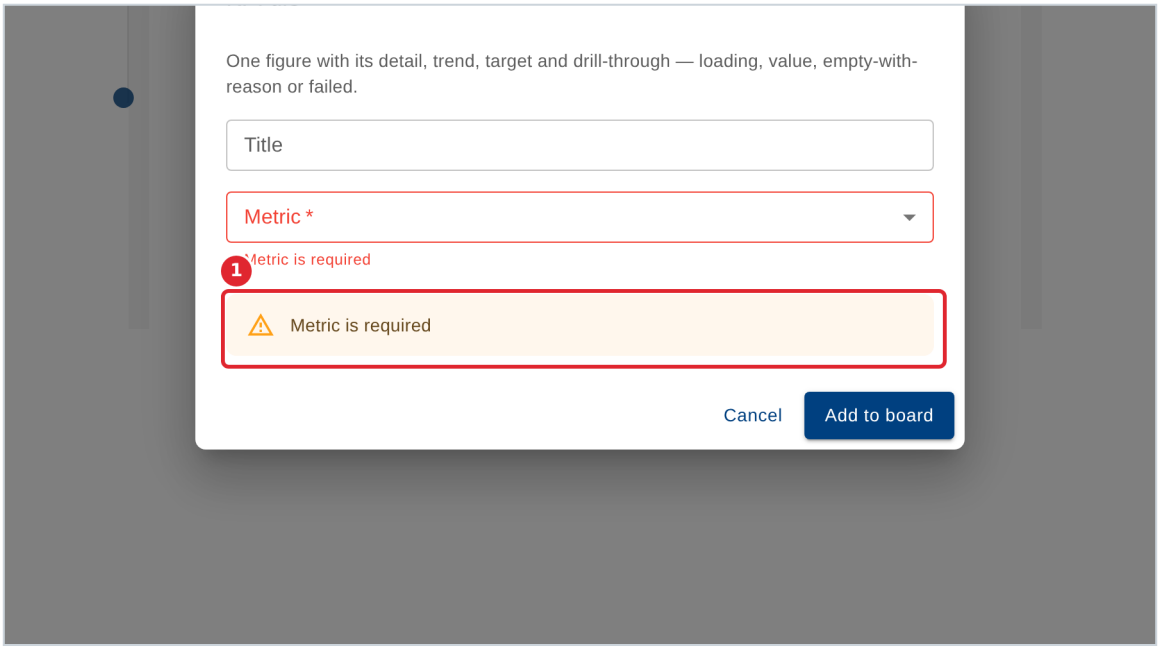
– Open the board in edit mode first.



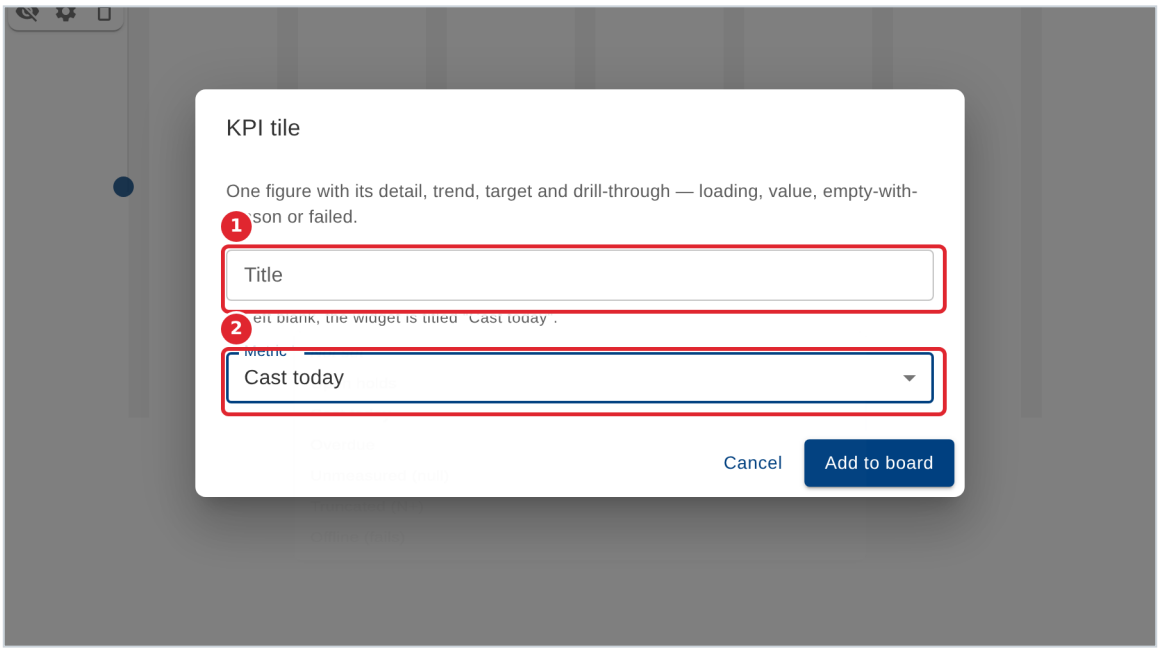
Step 1. In edit mode, select Add widget.



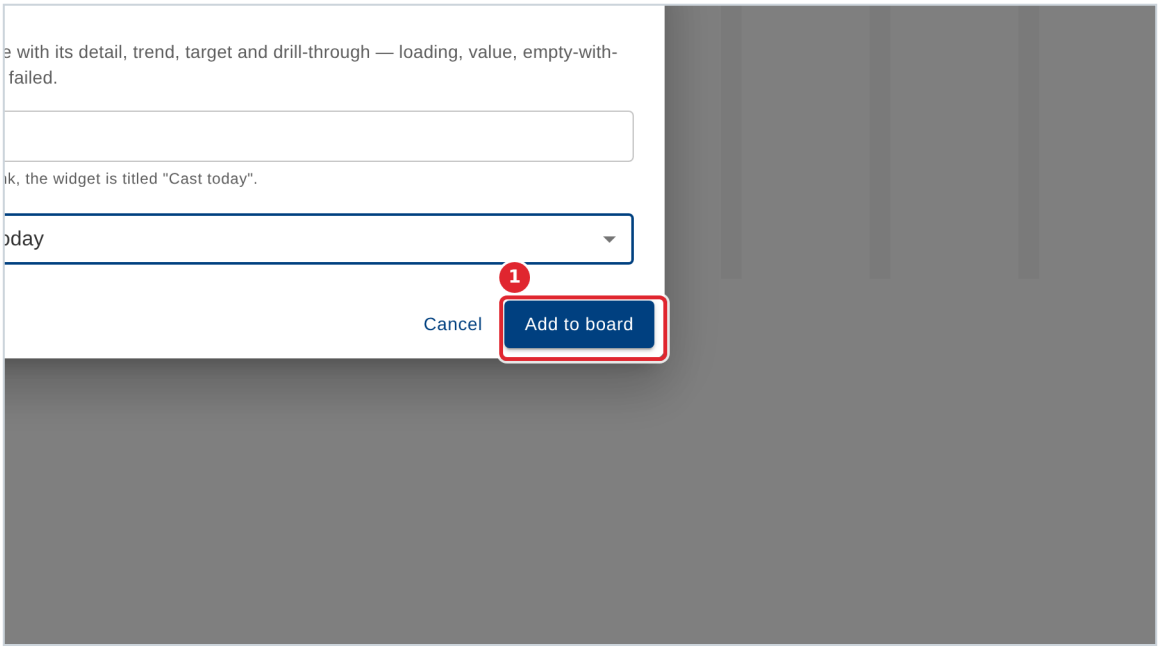
Step 2. Search, or choose a widget. The module widgets come first, then the standard widgets.



Step 3. Fill in the form. A field marked with a star is required, and the form says what is missing.



Step 4. Choose the figure. Leave the Title blank to use the figure's own name.



Step 5. Select Add to board.

Tips:

- Metric is required: a figure tile cannot be added until you choose the figure it shows.
- Only widgets your system can supply data for are offered, so the list can differ between boards.

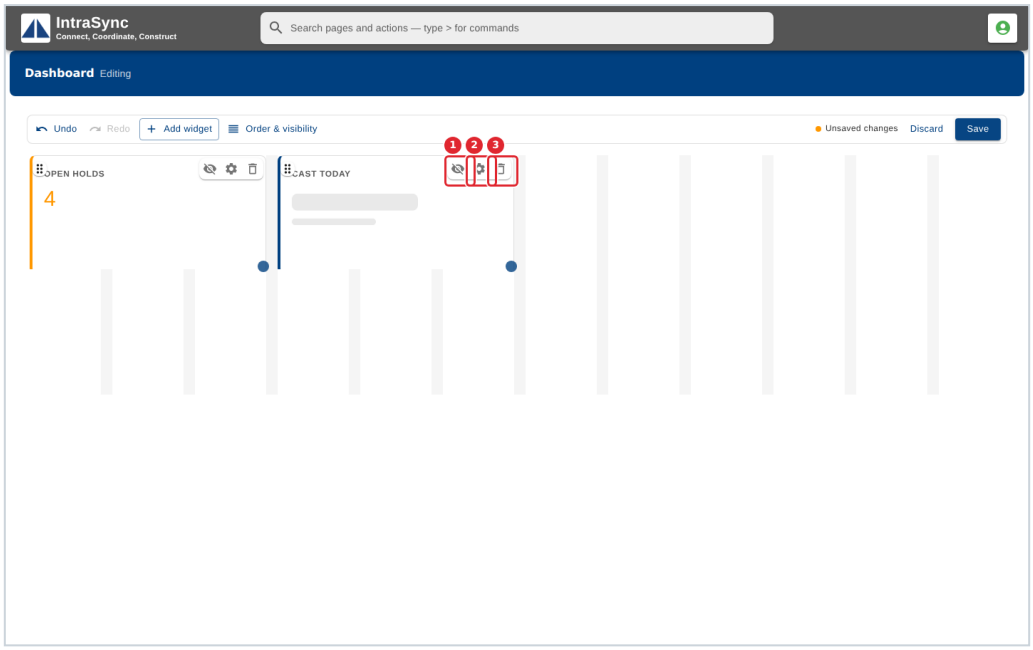
This is shown in the Dashboard video at 0:48.

10. Change or remove a widget

Change what a widget shows, hide it from the board, or take it off.

Before you start:

– Open the board in edit mode first.



Step 1. Use the buttons on a widget's bar: hide it for everyone, change its settings, or remove it.

Tips:

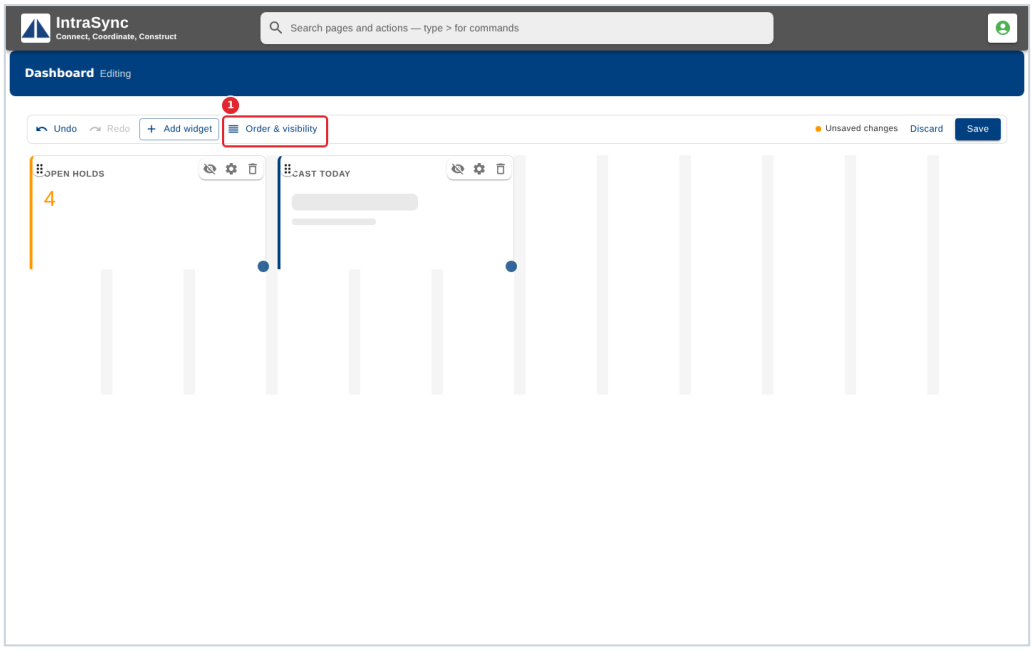
– A widget hidden for everyone stays on the board and can be shown again from Order & visibility.

11. Set the order of the widgets

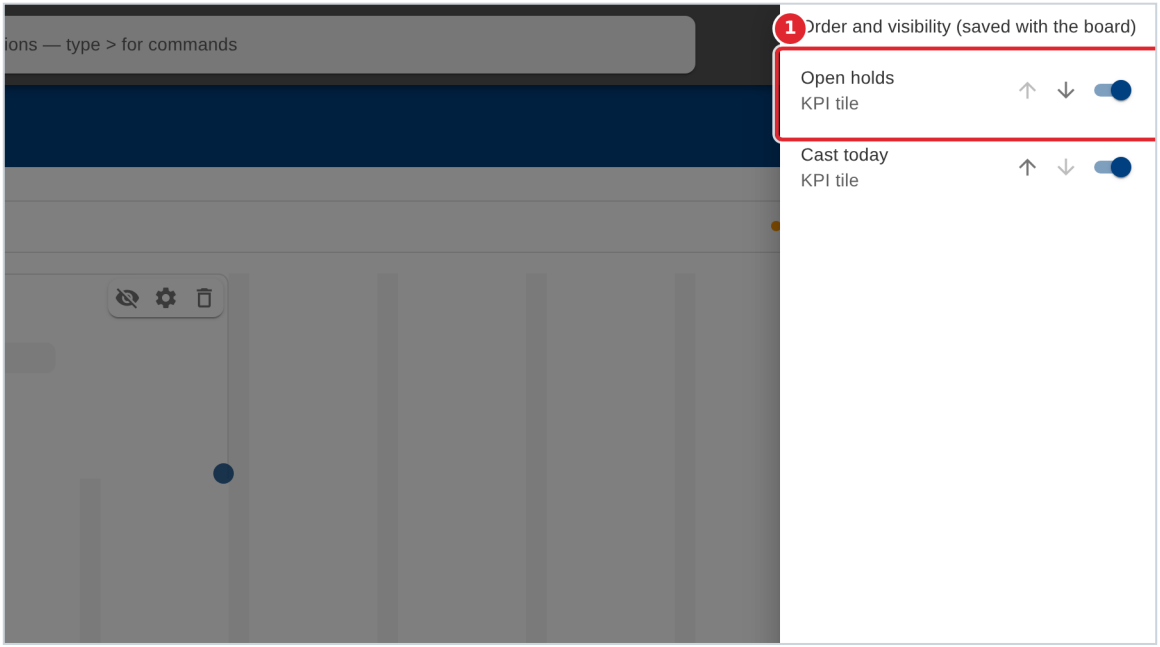
Decide which widgets come first and which ones the board shows, for everyone who opens it.

Before you start:

– Open the board in edit mode first.



Step 1. In edit mode, select Order & visibility.



Step 2. Use the arrows to move a widget up or down, and the switch to show or hide it on the board.

Tips:

– This order is saved with the board. Select Save afterwards.

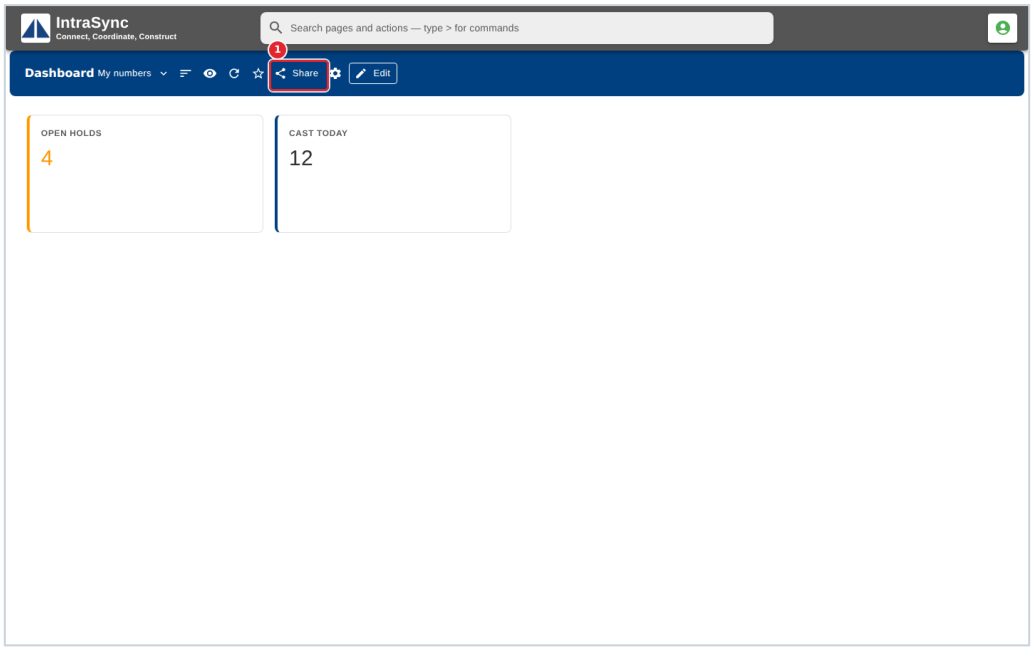
This is shown in the Dashboard video at 0:57.

12. Share a board

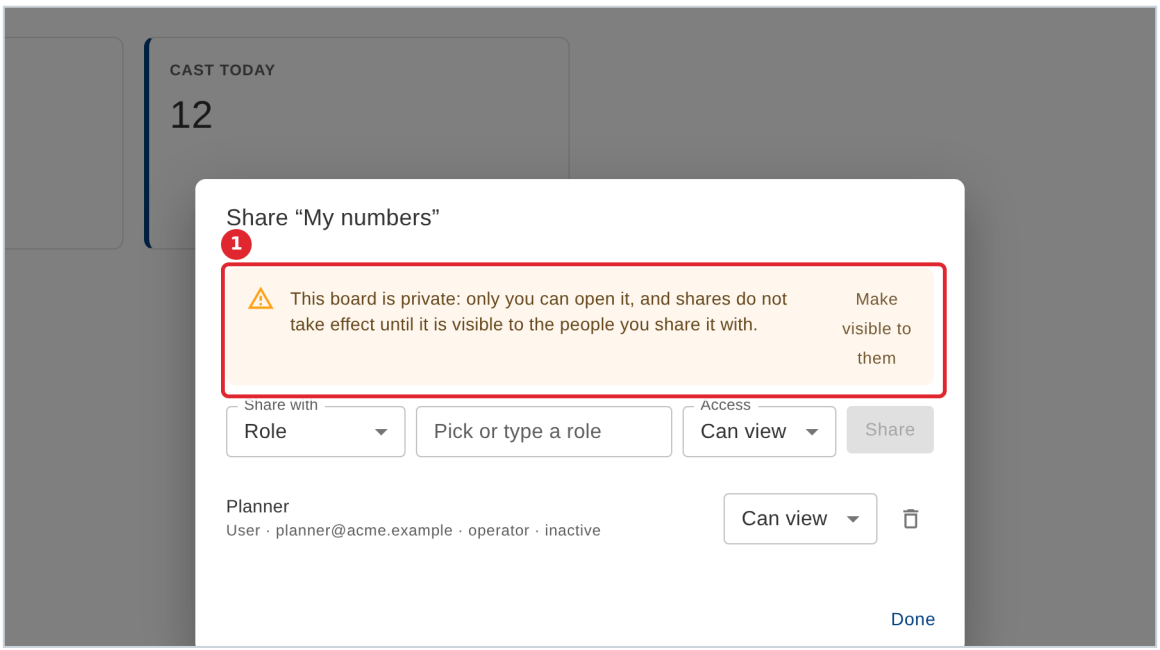
Let a role, a department or a person open your board, or edit it with you.

Before you start:

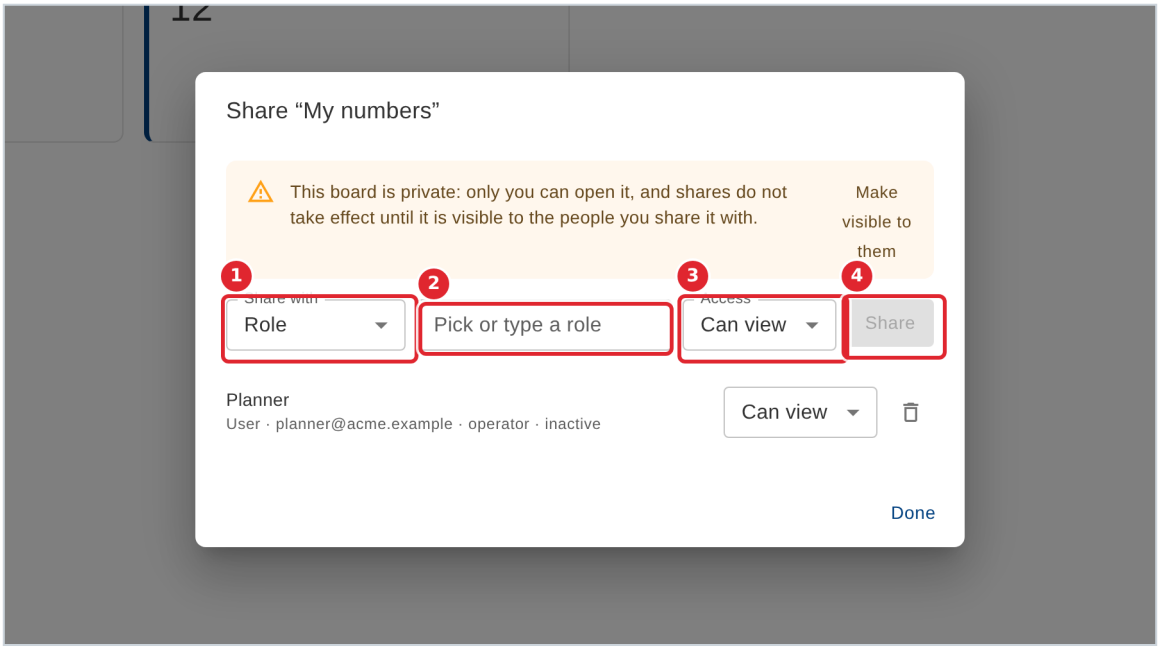
– You can share boards you own.



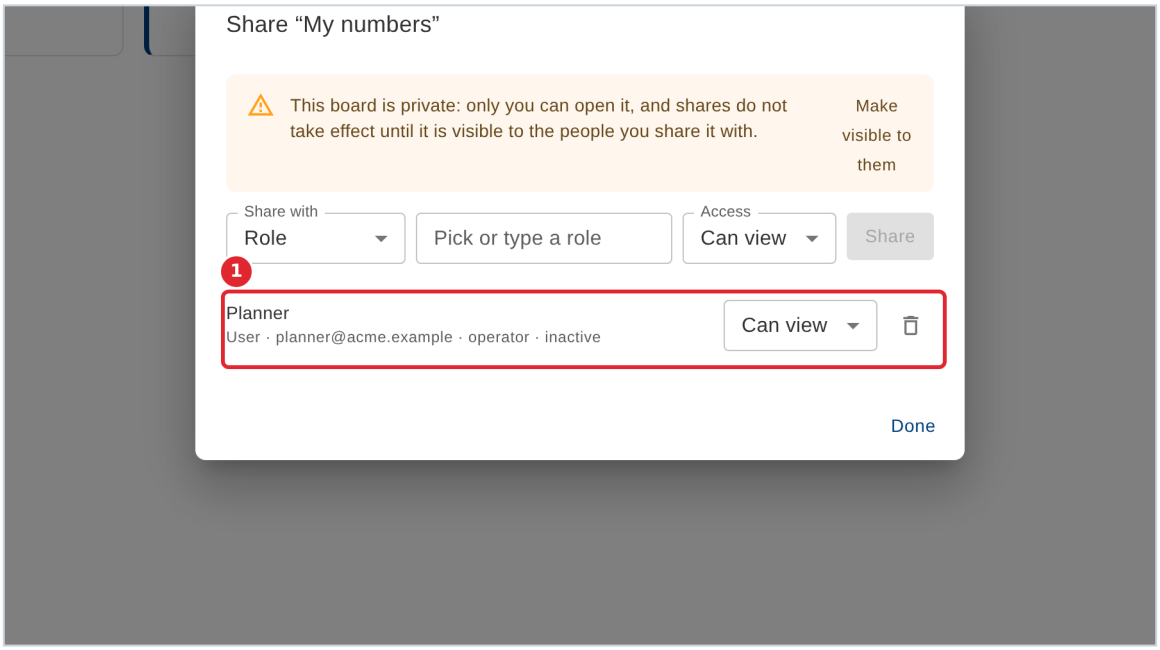
Step 1. Open your board and select Share.



Step 2. On a private board, select Make visible to them first. Shares stay inactive until the board is visible.



Step 3. Choose Share with (a role, a department or a person), pick who, choose the Access, and select Share.



Step 4. Change someone's access in place, or remove them with the bin.

Tips:

- Shares on a private board do nothing until the board is visible to the people you share it with.
- Can view lets people open the board; edit access also lets them change its widgets. Only the owner can share it further or change its settings.

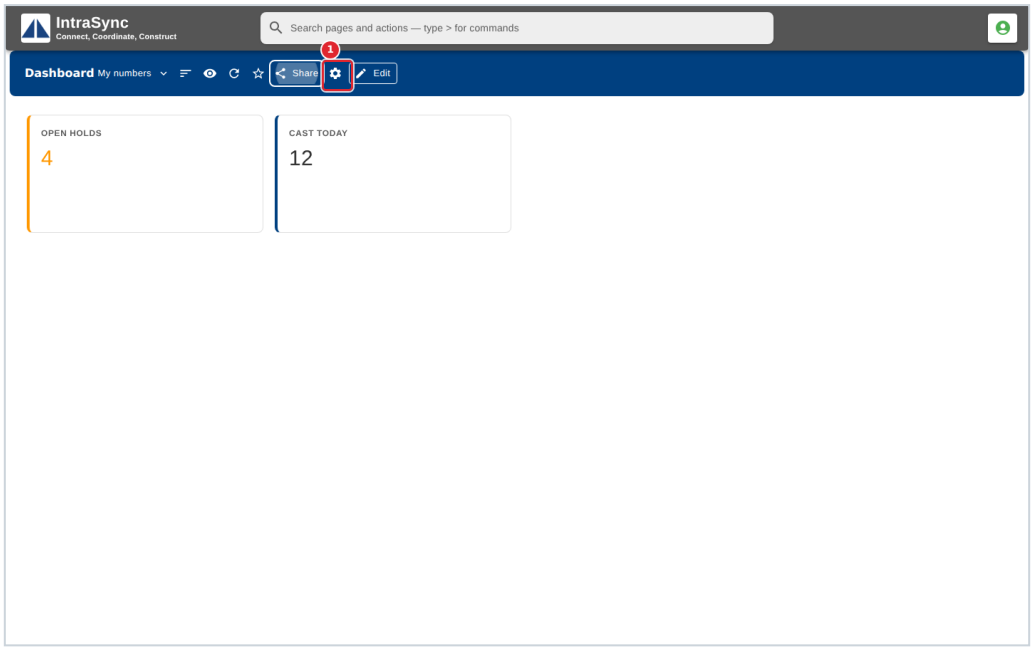
This is shown in the Dashboard video at 1:06.

13. Change a board's settings

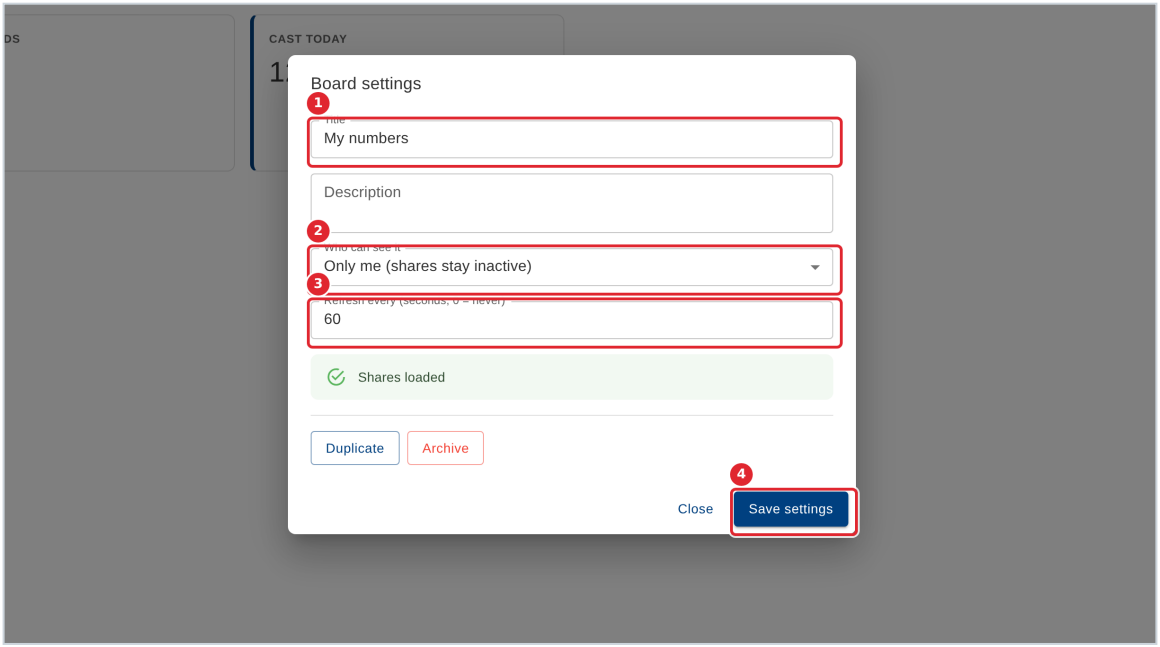
Rename a board, decide who can see it, set how often it refreshes, or copy or archive it.

Before you start:

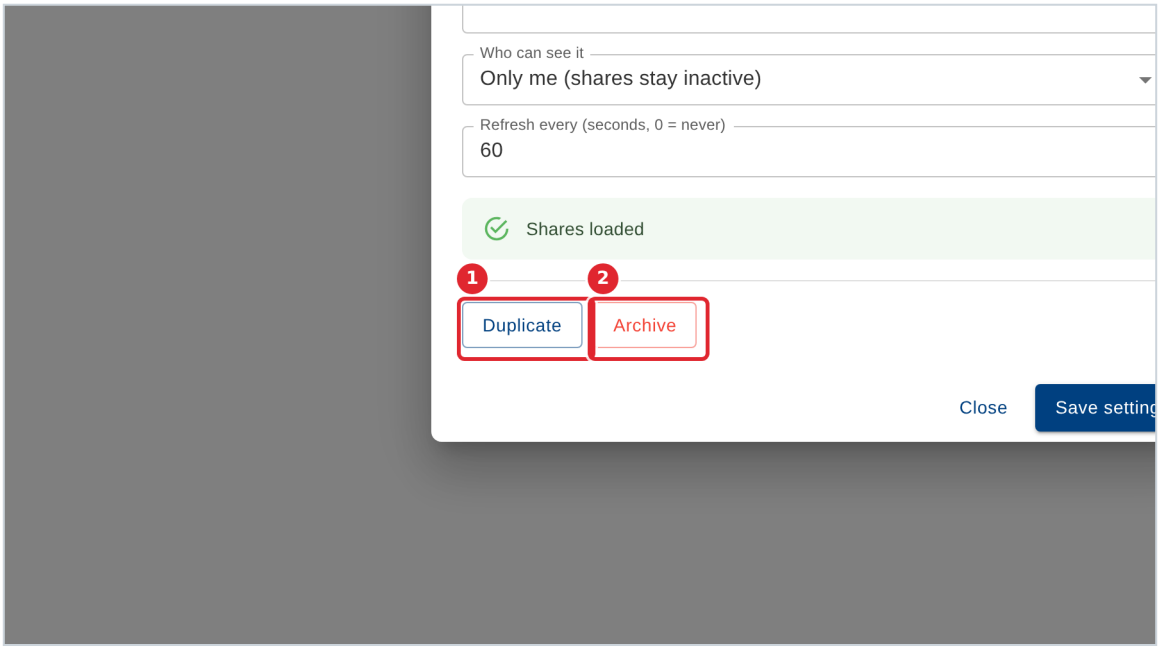
– You can change the settings of boards you own.



Step 1. Select Board settings in the header.



Step 2. Change the Title, Description, Who can see it, and how often the board refreshes. Select Save settings.



Step 3. Select Duplicate to copy the board, or Archive to take it out of use.

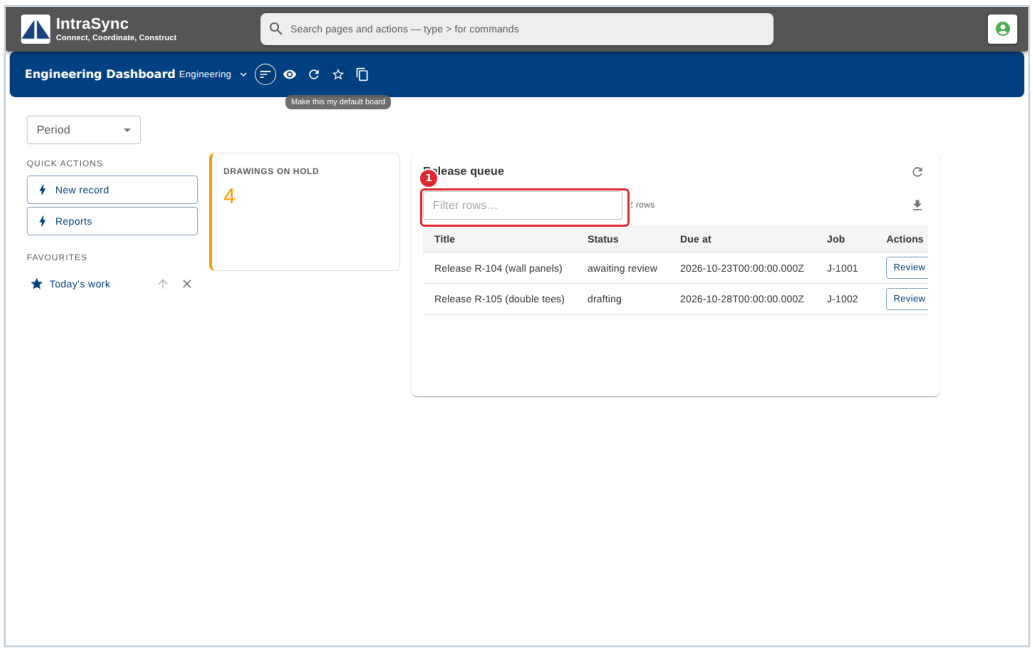
Tips:

– Set Refresh every to 0 to stop the board refreshing on its own.

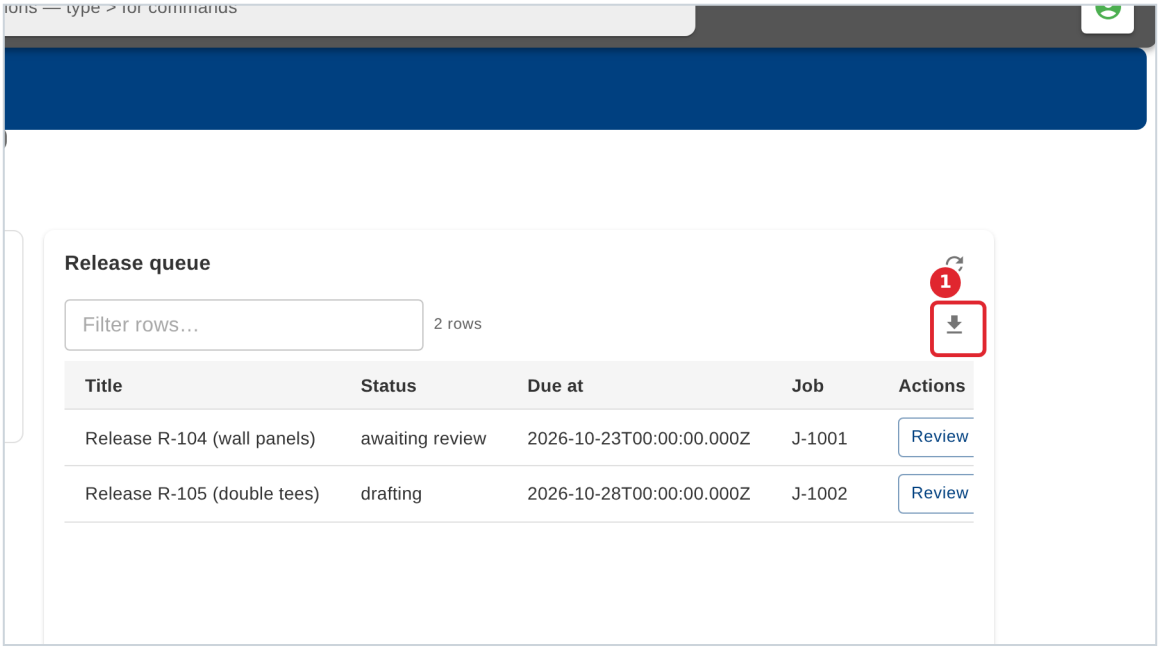
This is shown in the Dashboard video at 1:11.

14. Filter and download a table widget

Find the rows you need in a table and take them away as a spreadsheet.



Step 1. A table widget lists records from a module. Type in Filter rows to narrow the list.



Step 2. Select the download button to save the table as a CSV file.

This is shown in the Dashboard video at 1:15.

Glossary

- Board: A saved screen of widgets. A board can be private, shared, or the organisation's.
- Widget: One item on a board: a figure tile, a chart, a list or a table.
- Hub board: The board a hub opens on, set up for the whole organisation.
- Worst first: An order that puts the widgets needing attention at the top.