

Add a Dashlet to Your Homepage

Is there a report you use (or want to use) often? Make your PowerBase homepage *way* more useful by adding the reports that you need to see right to your PB homepage, also known as the dashboard.

If there is data you want to have right at your fingertips each time you log in to PowerBase, create a report and enable it as a dashlet.

Here are the steps to create a report that can be used as dashlet:

- Click **Reports > Create Reports from Templates**
- Select the report that you want to see on your dashboard.
- Choose the criteria you want to look at in your dashlet.*
- Click **Preview Report**.

Database Health Report - Template

Report Criteria

Display Columns

Contact Name Contact ID Modified Records

Modified Organizations Modified Households Sourced Activities

Role Last Access

Set Filters

Contact Name: Contains []

User Role: Is one of [] administrator, anonymous user, authenticated user, civicron

Record Creation or Modification Date: Choose Date Range [] From: [] To: []

Activity Date: This Year []

Activity Type: Is one of [] Media Coverage, Meeting, Membership Renewal, Membership Renewal Reminder

Preview Report ←

- Once there, click **Create Report**.
- At the bottom of the Create Report section, there's a checkbox that says "**Available for Dashboard?**"

Include Report in Navigation Menu? All report instances are automatically included in

Permission CiviReport: access CiviReport

ACL Group/Role anonymous user, authenticated user, administrator, civicron, Powerbase Administrator

Reserved Report? If reserved, only users with 'administer rese

Available for Dashboard? Users with appropriate permissions can ad

Create Report

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- Click it, and users with permission to see that information (i.e. if it's about events, users who have permissions to see event-related stuff) will be able to add that dashlet.
- Once you've enabled the dashlet, click **Home**.
- Click **Configure Dashboard**. Drag the dashlet from the "Available Dashlets" box to the column where you'd like it to appear.



Once you can view the report on your dashboard, you will have the latest info at your fingertips. If you suspect any data isn't up to date, just click Refresh Dashboard Data at the top right of the dashboard.

*Don't hesitate to reach out to support if you need help with creating reports at support@progressivetech.org or 612-724-2600 x 114

Read more about the dashboard and dashlets in the manual:
<http://book.civicrm.org/user/current/the-user-interface/menu-dashboard-and-dashlets/>