TAKING ADVANTAGE OF DYNAMIC DASHBOARDS

Summary

Dynamic dashboards show data according to each viewer's access level. A handful of dynamic dashboards may be able to replace hundreds of dashboards that have specific running users!

Your organization can have up to 5 dynamic dashboards for Enterprise Edition, 10 for Unlimited and Performance Edition, and 3 for Developer Edition. Additional dynamic dashboards may be available for purchase.

Overview

Administrators control access to dashboards by storing them in folders with certain visibility settings. Dashboard folders can be public, hidden, or restricted to groups, roles, or territories. If you have access to a folder, you can view its dashboards.

Folders control access to the dashboard, but the *running user* determines access to data. The running user options are:

- **Run as specified user.** The dashboard runs using the security settings of that single, specific user. All users with access to the dashboard see the same data, regardless of their own personal security settings. This approach is perfect for sharing the big picture across a hierarchy or motivating team members by showing peer performance within a team. If you don't have "View All Data," you can only choose yourself. If you have "View My Team's Dashboards," you can choose any user below you in the role hierarchy.

- **Run as logged-in user.** A *dynamic dashboard* runs using the security settings of the user viewing the dashboard. Each user sees the dashboard according to his or her own access level. This approach helps administrators share one common set of dashboard components to users with different levels of access.

With a dynamic dashboard, you can control data visibility without having to create a separate dashboard, with its own running user and folder, for each level of data access. A single dynamic dashboard can display a standard set of metrics across all levels of your organization.

Managers with the "View My Team's Dashboards" or "View All Data" permission can set an option to preview the dashboard from the point of view of users under them in the role hierarchy.

Example

Let's say that your opportunity team consists of one vice president, four sales managers, and 40 sales reps—10 reps per manager. You've been asked to create dashboards that display the following metrics, restricted by role and hierarchy:

Role	Total Bookings	Close Rates by Competitor	Number of Activities by Meeting Type
Sales Rep	✅		✅
Sales Manager	✅	✅	
VP of Sales	✅	✅	

Sales reps should only see their own data; managers should only see data for the reps they manage; and the VP should see data across the entire team. In this scenario, you'd typically have to create *45* different dashboards—one for every single person. You'd also have to create multiple folders to manage access rights.

With dynamic dashboards, you can create just *two* dashboards and store them in a single folder:

- Create a dynamic dashboard for sales reps with the following components:
    - A gauge of total bookings
    - A table of activities by meeting type

- Create a dynamic dashboard for managers and the VP with the following components:
    - A gauge of total bookings
    - A column chart of close rates by competitor

- Optionally, create filters that let viewers further refine their dashboard views. For example, create a filter on key accounts to let viewers focus on bookings, activities, and competitive threats for each account.

All users only see data that they can access. Sales reps see their own bookings and activities. Managers see bookings and close rates for the reps they manage. The VP sees bookings and close rates for the whole team. Because the metrics are the same for managers and the VP, you can use the same dynamic dashboard for both roles. The dynamic dashboards feature reduces the number of required dashboards from 45 to two!

Setting Up Dynamic Dashboards

Create a folder to hold the dashboard and its underlying reports, then create the dashboard.

💡 Tip: To avoid restricting the dashboard's view of the data:

- Make sure advanced filters don't include specific record owners (for example, `Opportunity Owner equals Frank Smith`).
- Don't click `Save Hierarchy Level` when saving opportunity reports.