

## Dashboard checklist

Reports and Dashboards are provided by Salesforce. As such there is a wealth of material available online that you can use to help you when creating Reports and Dashboards. Google is a good place to start when troubleshooting issues or looking for more information.

Dashboards provide high level summary reporting with drill down to support reporting. A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization.

Administrators control access to reports and dashboards by storing them in folders. Folders can be public, hidden, or shared by public group, role, permission or license type.

*Are your Kimble Dashboards appearing blank?*

*Can certain users not see the data they were expecting to see in a Dashboard?*

Review the items in the checklist below before raising a ticket with the [Kimble Support Desk](#).

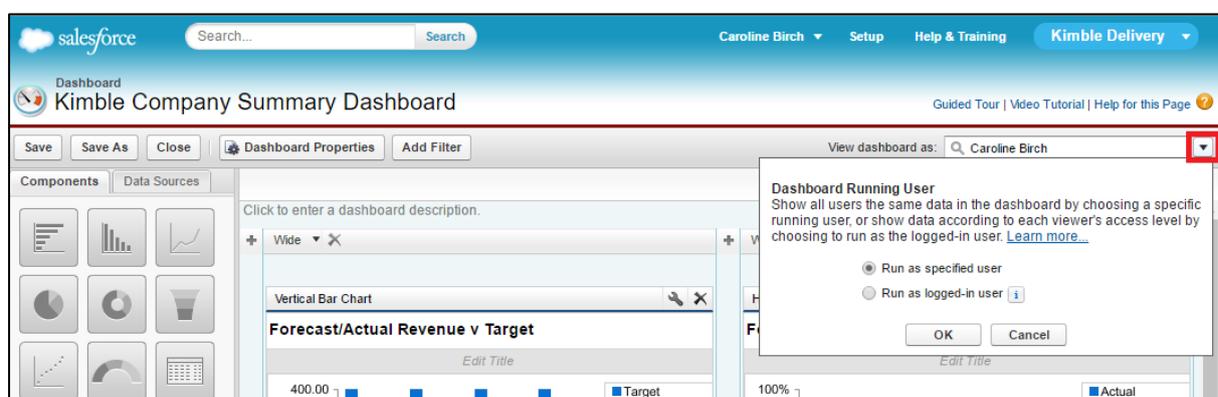
### Dashboard running user

To run a Dashboard, your Kimble access must be the same or higher than the person who created the Dashboard.

The Dashboard Running User should not be set to an Admin user, which will cause certain users to encounter an Insufficient Privileges error.

Dashboards should be viewed as a specific user with low-level access, so anyone viewing has at least the same security as the running users. Alternatively, Dashboards can be viewed as the logged in user; but different users may see different information in the Dashboards depending on their level of access.

To update the Dashboard running user, Edit the Dashboard, and click the down-arrow to change the Running User.

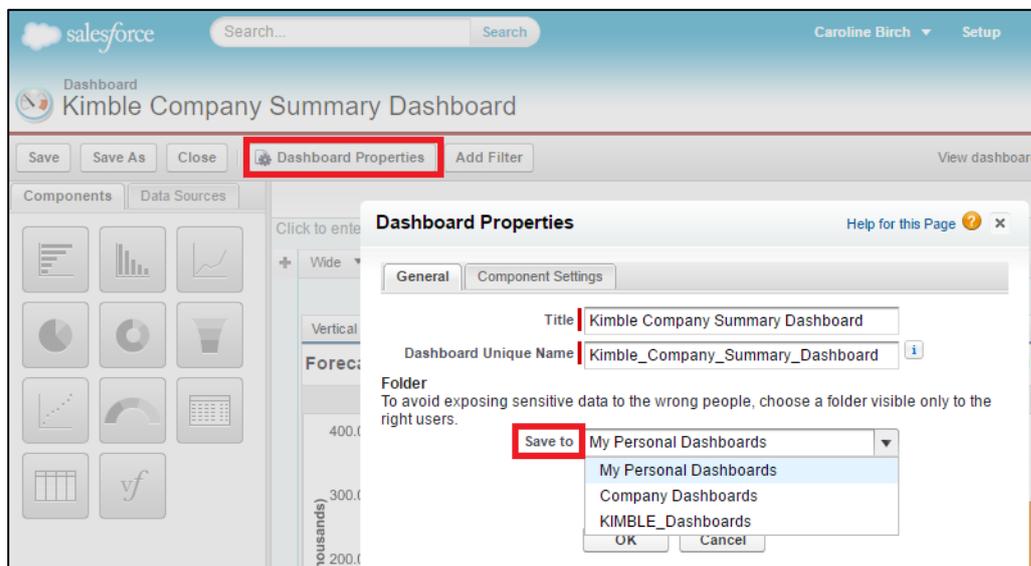


Please see [Why does my user get an insufficient privileges error when accessing a dashboard](#) for the Salesforce steps to resolve.

## ❑ Dashboard folder access

Access to reports is via Folders.

If a Dashboard is saved in a folder to which the user does not have access, you may wish to Edit the Dashboard, go to Dashboard Properties, and save the Dashboard to a different folder.



## ❑ Report data access

Users can only see report data to which they have been given access. Access is defined on Object level/field level/record level. This is controlled by the User's Profile or Permission Set assignment.