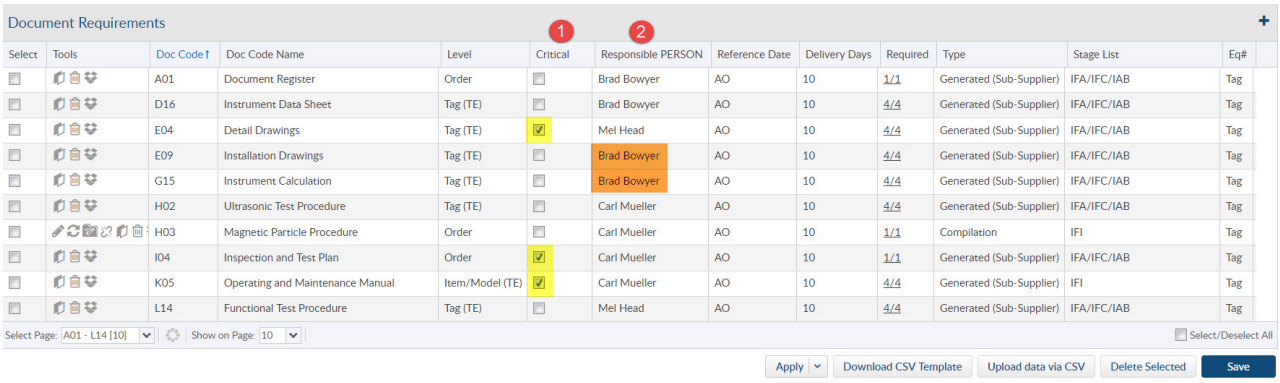
Configure Lenses on the Dashboard

07/14/2026 3:23 pm MDT

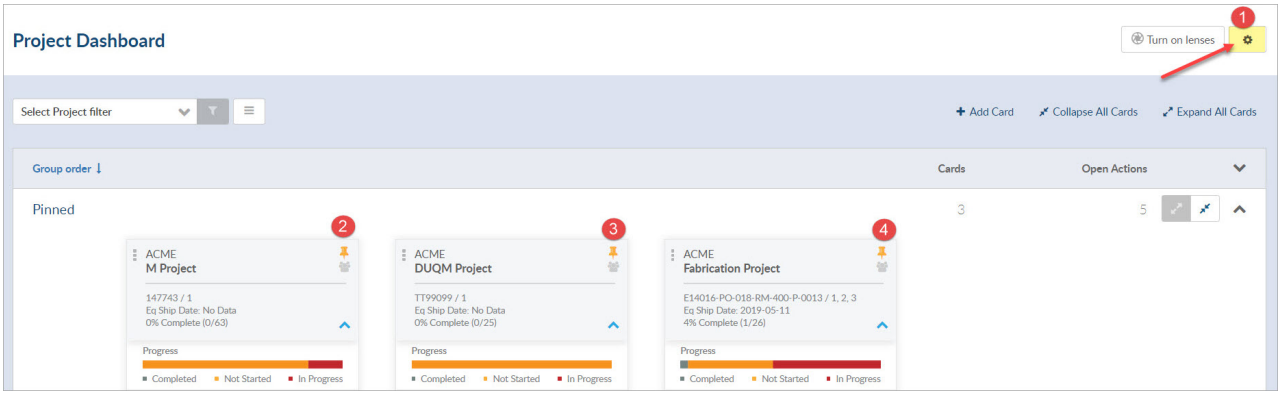
Lenses give users the ability to filter the information **INSIDE** each dashboard tile. They function as a global filter to all data on the dashboard. With a lens applied, the dashboard will only show tiles which match the selected filter, and the card data displayed on each tile will be filtered as well.

For example, assume you have a custom “Critical” field and a custom "Responsible Person" field enabled for some doc codes. These fields can be used as a lenses, allowing you to see card data in the tiles reflect only information for “Critical” documents, only information for documents assigned to the specified "Responsible Person", or both!



Adding Lenses

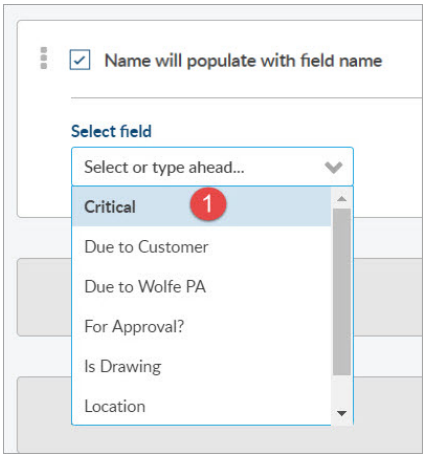
To add a lens, click the **Set Up Lenses (1)** button. In this example, notice there are three projects currently showing (2, 3 and 4).



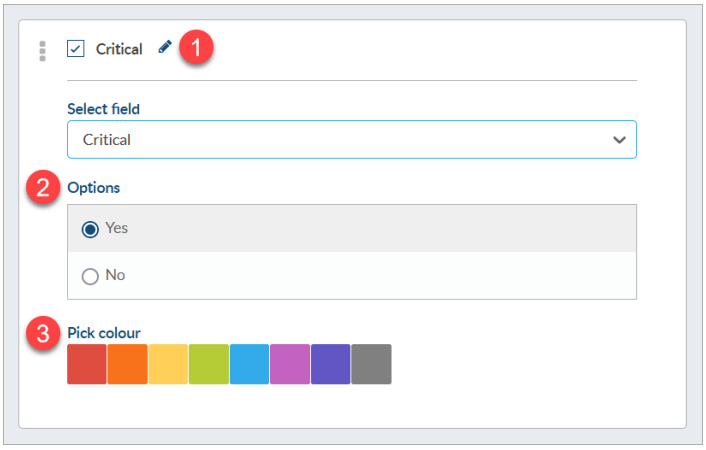
After clicking the setup button, you see the five lenses available for configuration. Click to enable the first lens (1).



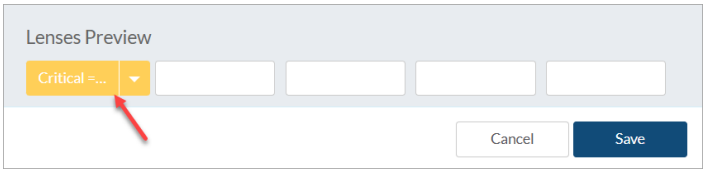
Once enabled, select the field you wish to use for the lens (1) - in this case, we'll configure a lens using the "Critical" field.



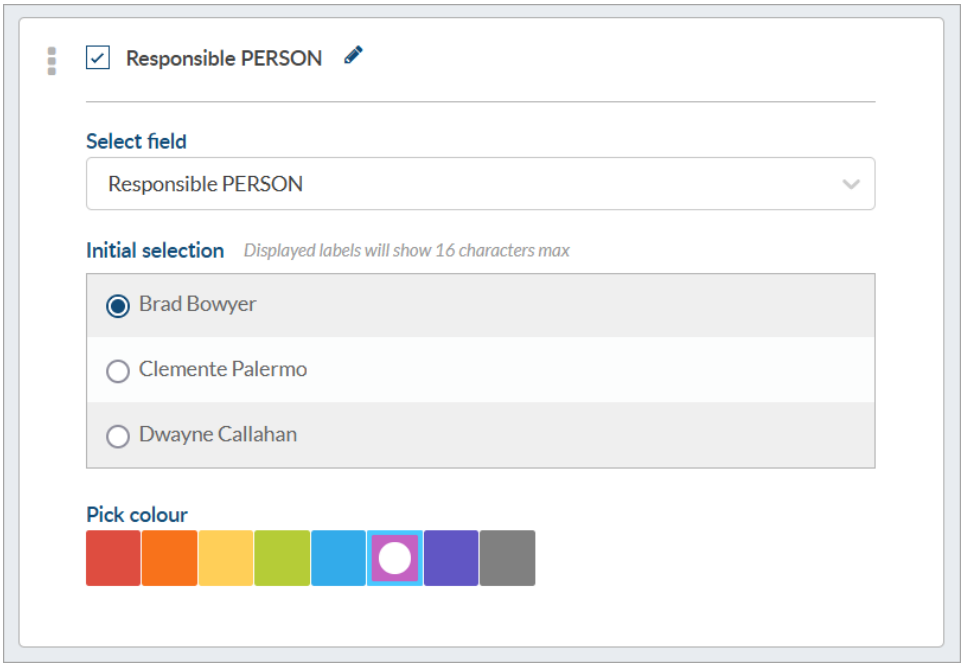
The field name will default as the lens name (1), but it can be modified by clicking the pencil icon. You will then see the available options for the default filter (2), and can select a colour to represent your lens (3).



At the bottom of the screen, a preview of the lens will appear:



With the first lens created, we can enable a second lens for the "Responsible Person" field:



On the dashboard, you can apply one or both lenses at once. In this example, applying both lenses results in only **one** project with matching cards (and the project tile now only shows the details of the 37 cards which match both parameters).

If you click the lens (2), it will turn off. If you click the drop-down (3), you can change the parameter. You can disable all lenses at once by clicking "Turn off Lenses" (4), or re-enter the lens configuration area to make adjustments (or add more!).

