

# Create a New Folder & Duplicate a Dashboard

The following steps will walk you through creating a new folder on the Insights menu rail. It will also walk through the steps of duplicating a dashboard and moving it to the newly created folder.

1

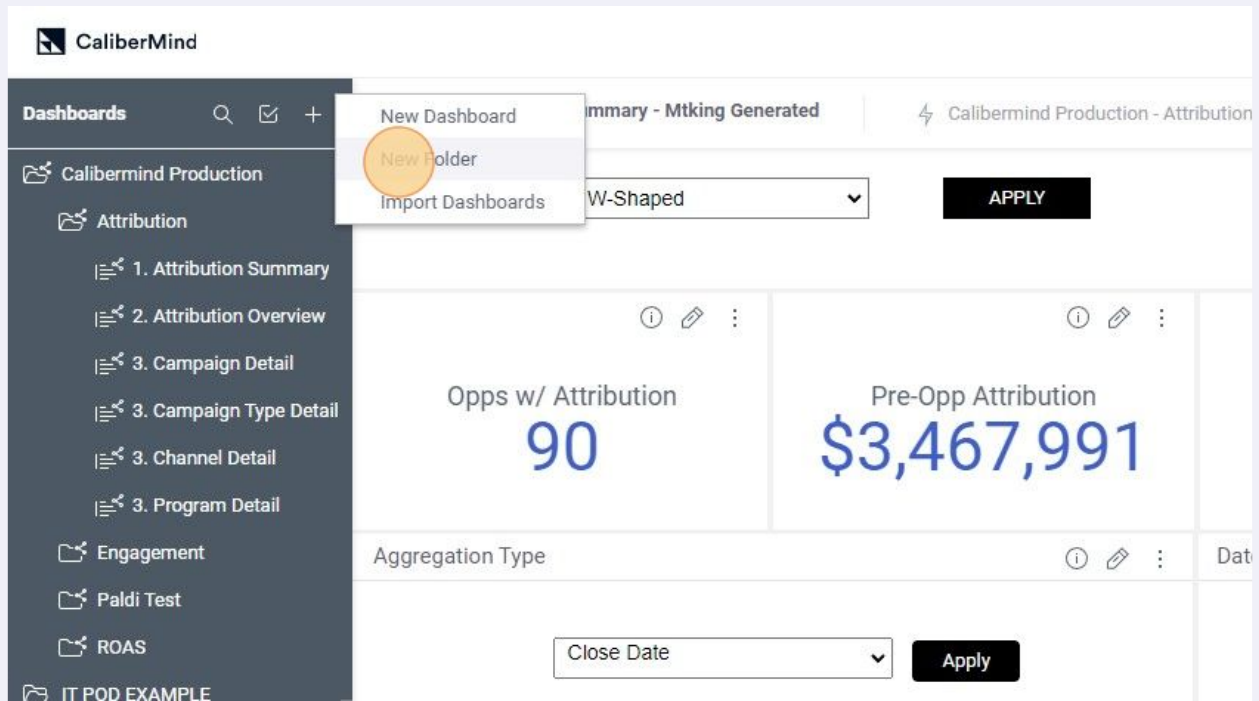
Navigate to <https://insights.calibermind.com/app/main#/dashboards/62e3ff5cabb799003874561f>

2

Click on the plus sign at the top of the Insights left menu rail.

The screenshot shows the CaliberMind dashboard interface. On the left is a dark grey menu rail with a search icon, a plus sign, and a folder icon. The menu items are: Calibermind Production, Attribution (with sub-items: 1. Attribution Summary, 2. Attribution Overview, 3. Campaign Detail, 3. Campaign Type Detail, 3. Channel Detail, 3. Program Detail), Engagement, Paldi Test, ROAS, and IT POD EXAMPLE. The main content area shows a dashboard card titled "1. IT POD Attribution Summary - Mtking Generated". The card has a search icon, a plus sign, and a refresh icon. Below the title is a section labeled "ADD TITLE" with "Attribution Model" set to "W-Shaped" and an "APPLY" button. The card displays two metrics: "Opps w/ Attribution" with a value of "90" and "Pre-Opp Attribution" with a value of "\$3,467,991". Below the metrics is a section labeled "Aggregation Type" with a "Close Date" dropdown and an "Apply" button.

3 Click "New Folder"



4 The new folder has been added to the Insights menu rail.

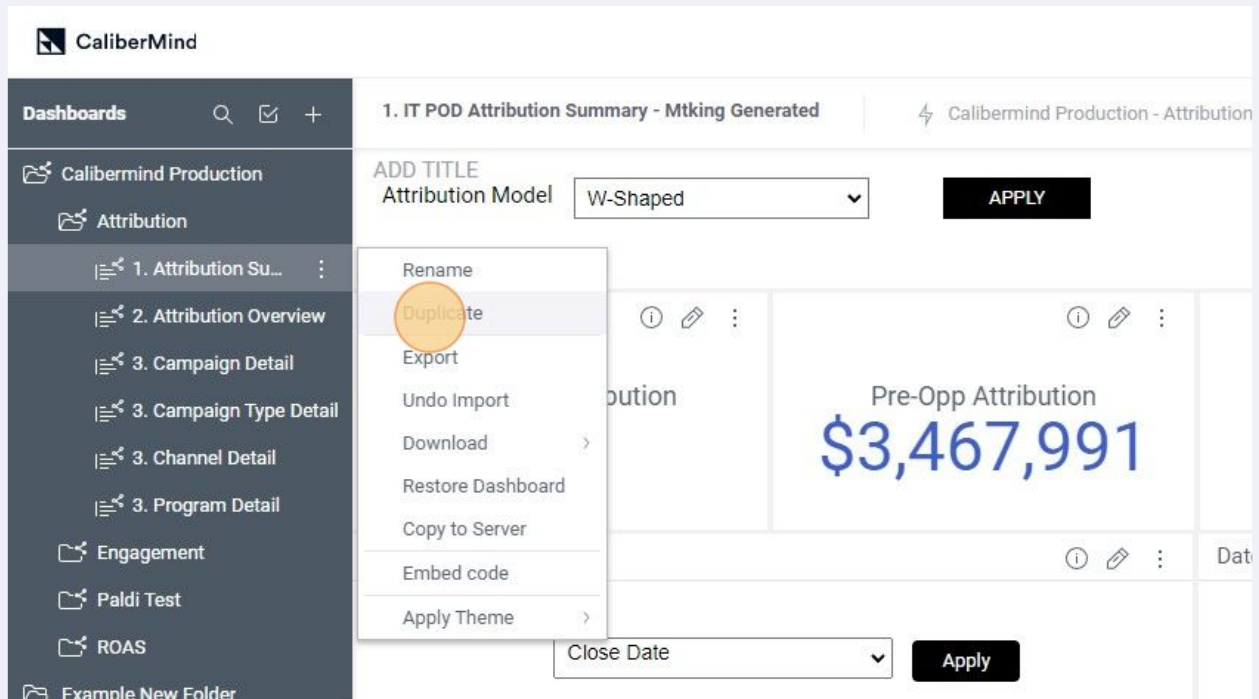
5 Rename the folder and click the green check mark to save your work.

The screenshot shows a dashboard interface with a dark sidebar on the left and a main content area on the right. The sidebar contains a folder tree under '3. Program Detail' with items: Engagement, Paldi Test, ROAS, IT POD EXAMPLE, 1. IT POD Attribution Sum..., 2. IT POD Attribution Overvi..., Example New Folder|, Training, and Pipeline Generation. The 'Example New Folder|' item is highlighted with a green checkmark icon and a red 'X' icon, indicating a rename operation. The main content area has a top section with 'Aggregation Type' and a 'Close Date' dropdown menu with an 'Apply' button. Below this is a 'Tab Selector' with a 'Campaigns' button. The bottom section is titled 'Attribution' and features a bar chart with a y-axis ranging from \$1M to \$1.75M. A legend indicates 'Post-Opp Attribu' with a blue square. A single blue bar is visible on the chart.

! Now duplicate the 1. Attribution Dashboard.

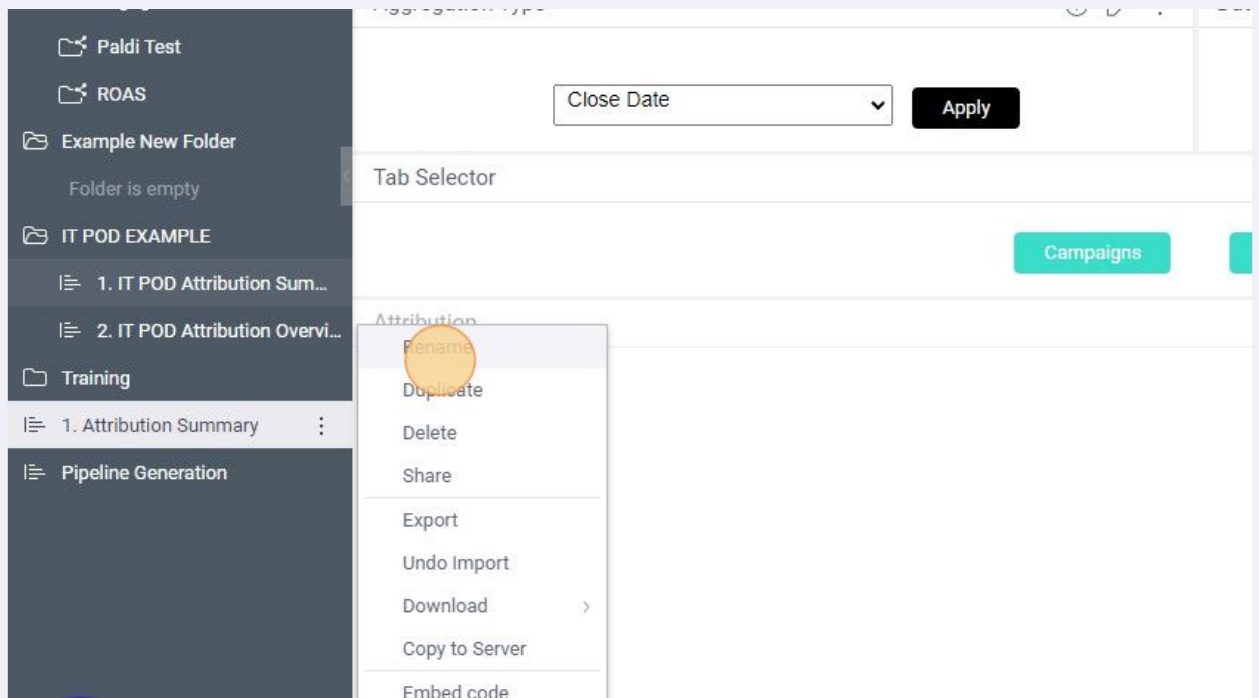
6

Click the vertical ellipses to the right of the dashboard name. Select "Duplicate" from the fly-out menu.



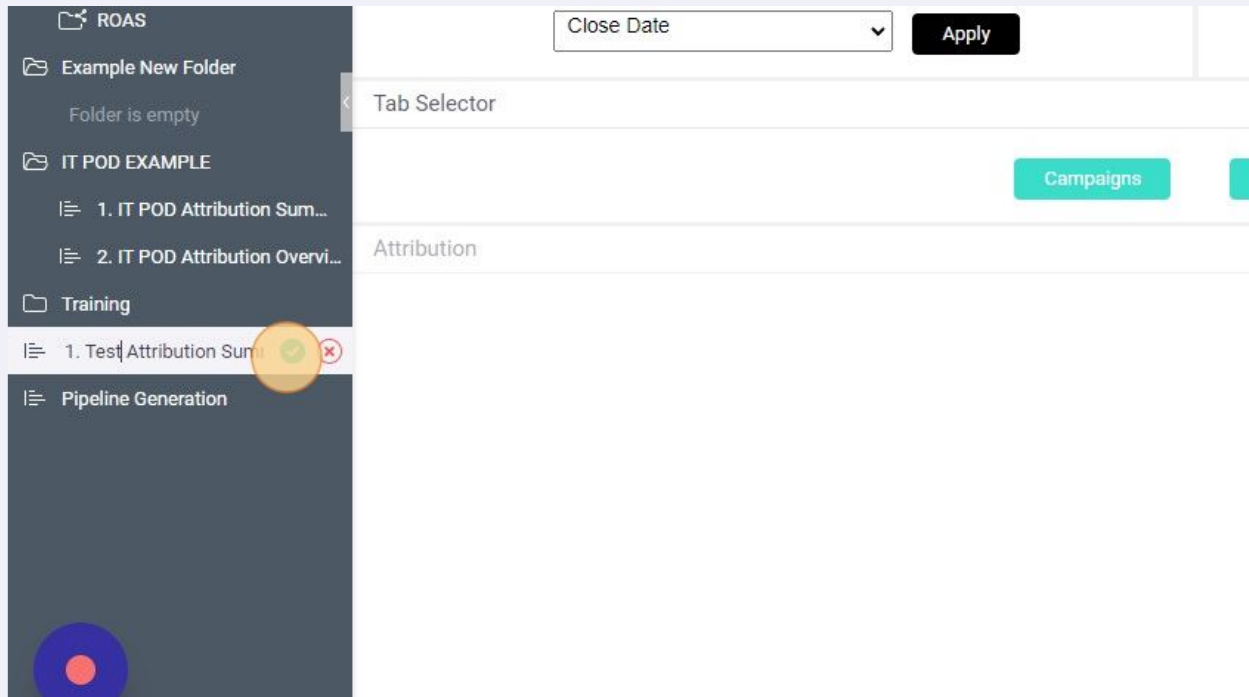
7

The newly duplicated dashboard will appear at the bottom of the left menu rail.



8

Rename the menu - remember to keep the 1. in the name for visual hierarchy as you proceed with your new dashboard. Click the green check mark to save your work.



9

Move the dashboard to the new folder. Click, hold, and drag the newly created dashboard and release below the chosen folder.



10

Click "1. Test Attribution Summary" to view the duplicated dashboard.

The screenshot shows a dashboard interface. On the left is a dark sidebar with a folder tree. The main content area has a white background with a 'Close Date' dropdown and an 'Apply' button at the top. Below that is a 'Tab Selector' with a 'Campaigns' tab. The main section is titled 'Attribution' and contains a stacked bar chart. The y-axis is labeled 'Dollars' and ranges from \$0 to \$2.5M. The chart shows two bars: the first is a single blue bar at approximately \$0.9M, and the second is a stacked bar with an orange base at approximately \$0.8M and a blue top at approximately \$1.3M. A legend indicates 'Post-Opp Attribu' for the blue color.

Close Date

Tab Selector

Campaigns

Attribution

Dollars

Post-Opp Attribu

Category	Value (Dollars)
1. Test Attribution Summary	~\$0.9M
2. IT POD Attribution Overview	~\$1.3M