

As of June 9th, 2021, Synthesio has introduced a new Setup experience! We will roll existing dashboards onto the new experience in a phased manner. The new Setup experience allows for greater flexibility, less boolean dependencies, and the ability to leverage all of Synthesio's recent enrichment enhancements (entities, emotions, semantic analysis, etc.).

This is the first of a series of 3 articles to get all the keys in hand to set up a Synthesio dashboard.

In this series, we will walk you through the process of creating and setting up a dashboard and highlight the different options and the key aspects you should be mindful of, whether you were a user of the previous set-up or not.

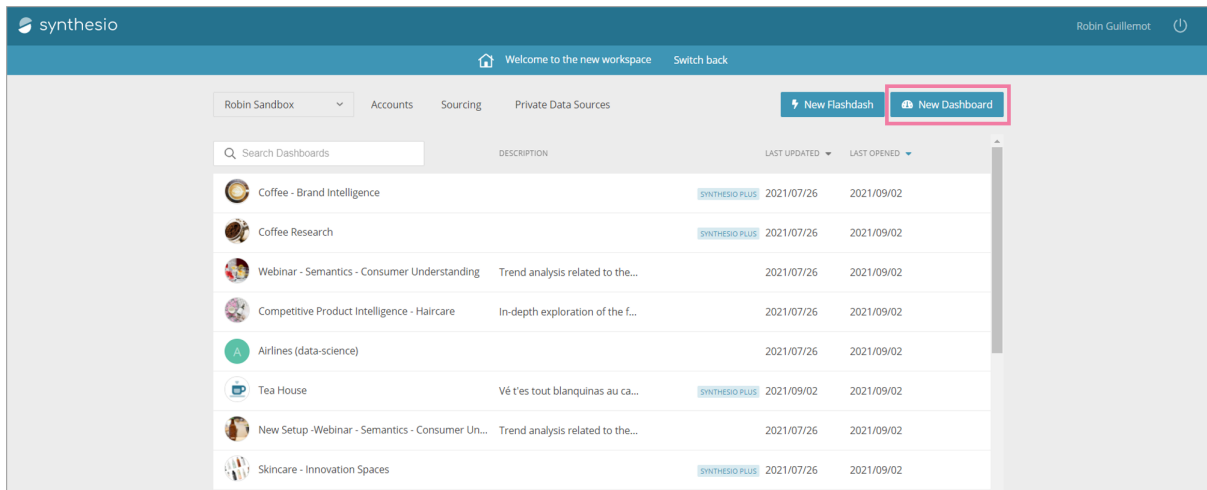
1. This first article covers the basics
2. The second article walks you through populating your topics and subtopics with mentions ([HERE](#))
3. The third article addresses the range of non-boolean approaches at your disposal to populate your topics and subtopics ([HERE](#))

Agenda of the first article:

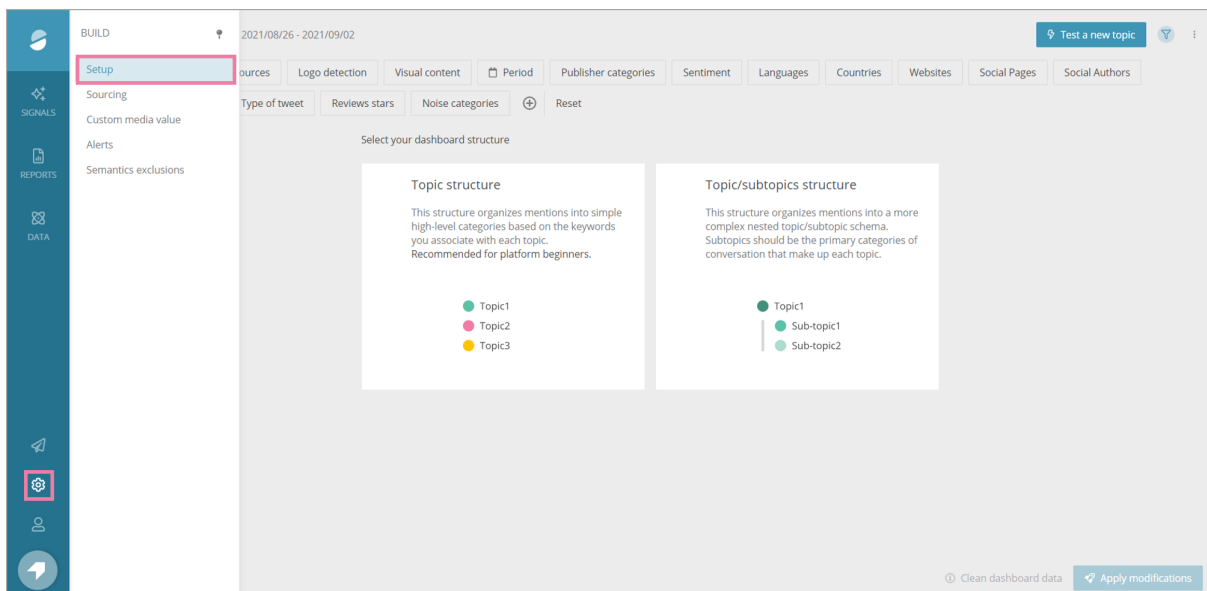
- Create a dashboard
- Topics Structure
- Global Filters
- Options
 - Send all mentions to Human Review section
 - Enable Private Data in all your topics

Create a Dashboard

Before accessing the settings of your dashboard, you need to create one. In your workspace, you can hit "New Dashboard", give it a name and click on Create.



At this stage, your dashboard has been created, but is empty, there is no data in it. You need to go to the Setup section to start defining the settings to filter and enable data to populate your dashboard.



Once you are in the Setup, you can start the journey.

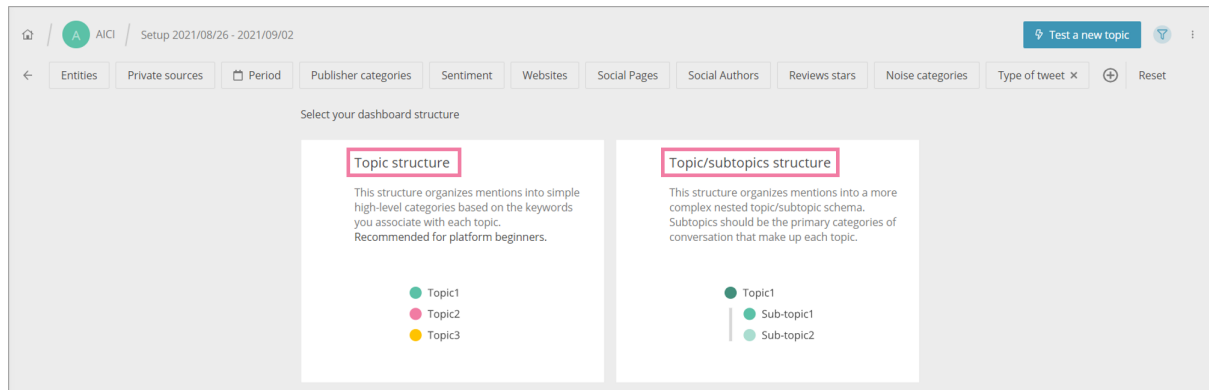
Topic Structure

This is the first thing when building a dashboard is that you can choose between two types of structure:

- **A one-level structure:** Topics only
- **A two-level structure:** Topic and Subtopics

If you choose a one-level structure, you will set up your dashboard to populate each Topic with data. If you choose a two-level structure, you will set up your dashboard to

populate each Subtopic with data. The Topics that aggregate several Subtopics will automatically contain the data found within each Subtopic.



Note for users of the previous Setup experience: The Quickstart Mode is no longer available in Synthesio. It was a simplified way for users who are unfamiliar with Boolean syntax to create a dashboard. Within the new Setup experience, you have access to easy ways of creating a dashboard in the same interface. Please [read the third article](#) of this series to learn more about that.

Global Filters

These are the filters located at the top of the Setup Experience.

Important Note: The filters you choose here will automatically apply to your topics and subtopics. If needed, there is a way to bypass this rule when populating your topics and/or subtopics. Please read our dedicated article should you want to learn more.

When landing on the Setup experience for the first time, you need to discover the range of filters at your disposal.

The Global Filters default displayed are:

- Period
- Publisher Categories

		SUBTOPICS	LAST EDITED	
Health Conscious Trends	Empty query	14	2021/06/08	Copy Delete Edit
Consumption Moments	Empty query	8	2021/06/08	Copy Delete Edit
Flavours	Empty query	27	2021/06/08	Copy Delete Edit
Lifestyle & Wellness Trends	Empty query	7	2021/06/08	Copy Delete Edit

*Please note that on this screenshot, the Topics have already been created. However, when you are building a dashboard from scratch and landing on this page, you will not see any Topics as they are not yet created.

How to define default filters?

Instead of the two filters displayed by default mentioned above, you can create your own custom list of default filters. However, for now, defining your default filters cannot be done within the Setup experience. It needs to be done throughout the Listen Tab section. Should you want to learn more about defining your default filters in the Listen Tab, please read our dedicated article ([HERE](#)).

In the below screenshot, you will see all the available filters in the Setup.

		SUBTOPICS	LAST EDITED	
Health Conscious Trends		14	2021/08/25	Copy Delete Edit
Consumption Moments	Empty query	8	2021/06/08	Copy Delete Edit
Flavours	Empty query	27	2021/06/08	Copy Delete Edit
Lifestyle & Wellness Trends	Empty query	7	2021/06/08	Copy Delete Edit

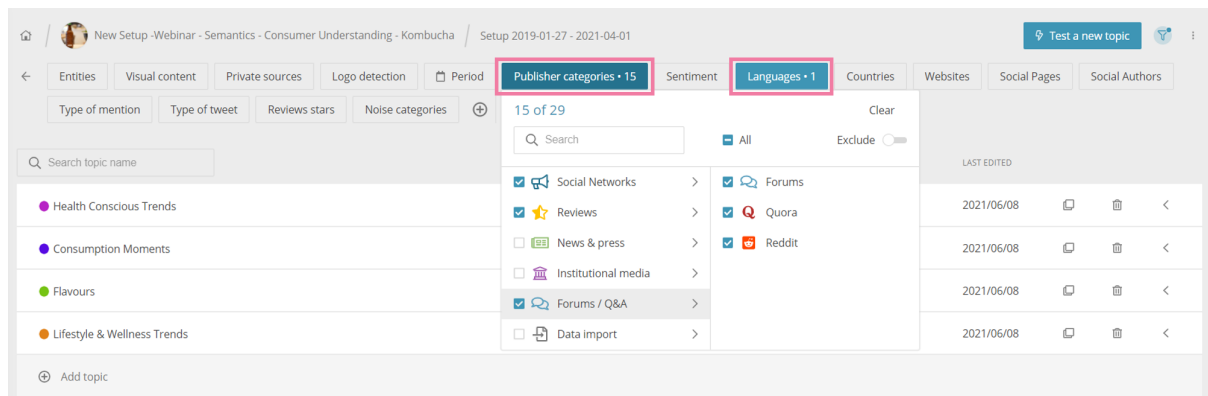
You can play with these filters to define the scope of every one of your Topics and Subtopics.

The filters you define here are automatically applied to every topic and subtopic within your setup, both when you create a new topic/subtopic and to topics/subtopics that may already have been created (even before you define global filters).

For example, in the below screenshots, we have applied filters on:

- Languages: English only
- Publisher categories: Social Networks, Reviews and Forums / Q&A

This means that the topics you will create will fall under this scope.



Options

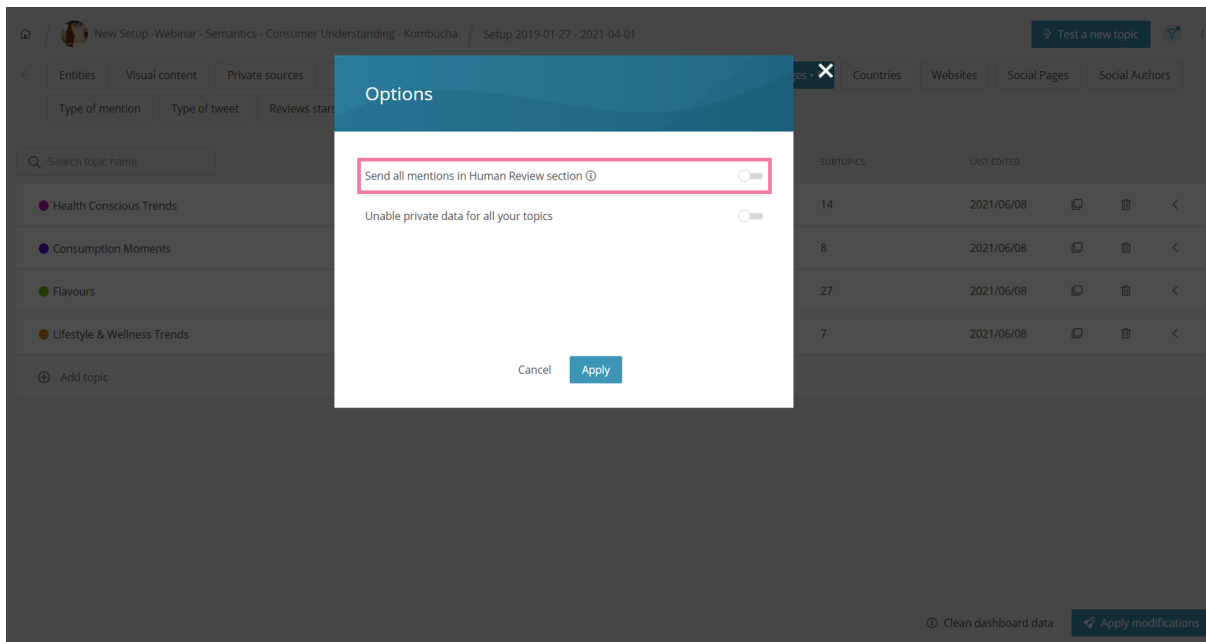
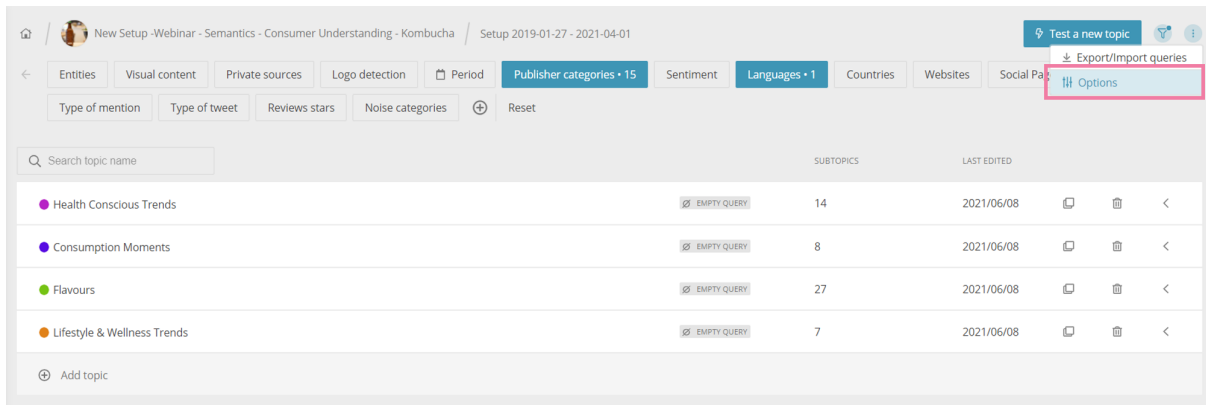
Send all mentions to Human Review section

Before starting populating your topics and subtopics, you can choose whether you want to send all mentions that will be collected to Human Review section.

What are the differences between both options?

- Do not send all mentions to Human Review:** It's the default option. All collected mentions are automatically marked as reviewed. **Please note that when browsing through your mentions, building widgets and data visualizations, only marked as reviewed mentions are taken into account.** Even if they have been marked as reviewed, you have the ability to change how some of them have been categorized by our algorithms if you spot some irrelevancies. Please [take a look at this article](#) should you want to know more about powering human review on your mentions.
- Send all mentions to Human Review:** Through this option, you choose that all collected mentions need to be reviewed by humans before being integrating into widgets and data visualizations. We do not recommend using this option unless you have dedicated people that can spend time reviewing and approving a large number of mentions.

However, should you want to enable the option, click on the three dots on top right of your screen, select Options. Then you can enable the toggle "Send all mentions in Human Review sections".



Unless you have a specific use case or are used to proceed like this, we do not recommend using this option as it can be very time-consuming to review every collected mention.

Enable Private Data for all your topics

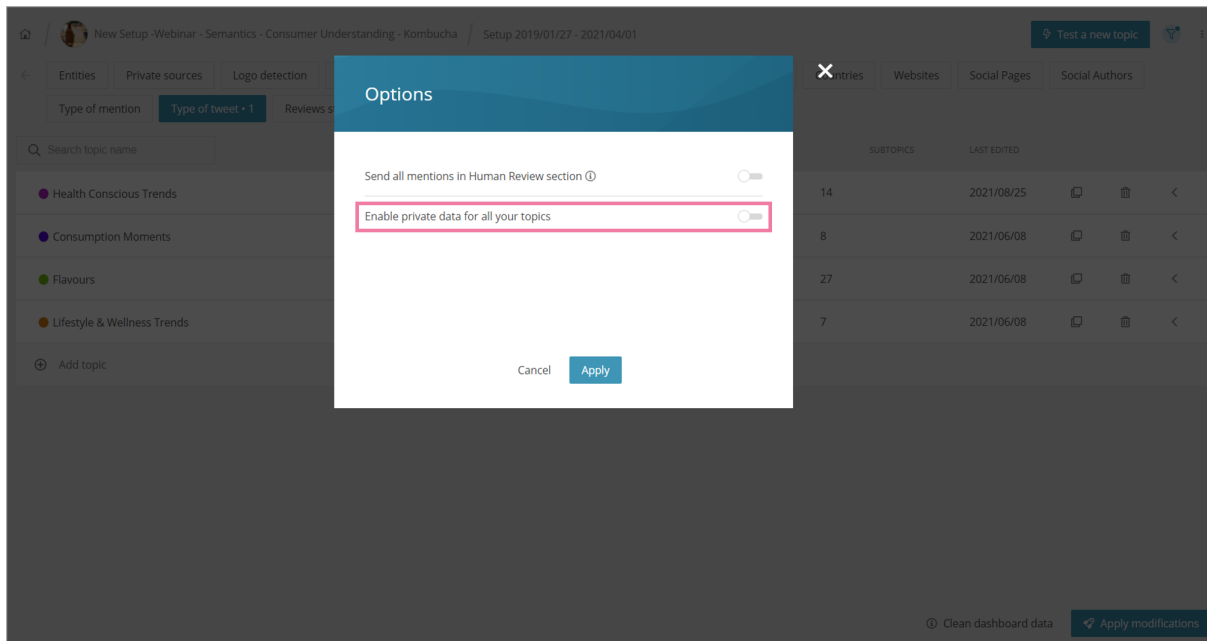
You can choose to populate a Topic/Subtopic with your own private data. To learn more, please read our dedicated article on populating topics and subtopics.

You can also choose to enable your queries to look into your Private Data files to populate your topics/subtopics.

To do so, you need to have Private Data files already imported at client level (please take a look [here](#) to know how to do it).

Then, in the set-up, hit the three dots on top right of your screen and click on Options.

You can then choose to turn on the toggle "Enable private data for all your topics".



This means that if you choose the query mode to populate a topic/subtopic, the query will not only look for data on the web and social media, but also on your private data files. Of course, it will only work if there are some mentions in your private data files that match your query(ies).

Now that we covered the basics, we can go into more details about populating topics and subtopics with data. It's [right here to read the next article](#).