



# General Dashboards



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# Chapter 1

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## Overview

### Topics:

- [Overview of General Dashboards](#)
- [Access the Dashboards page](#)
- [Access a Dashboard](#)
- [General Dashboards Workflow](#)

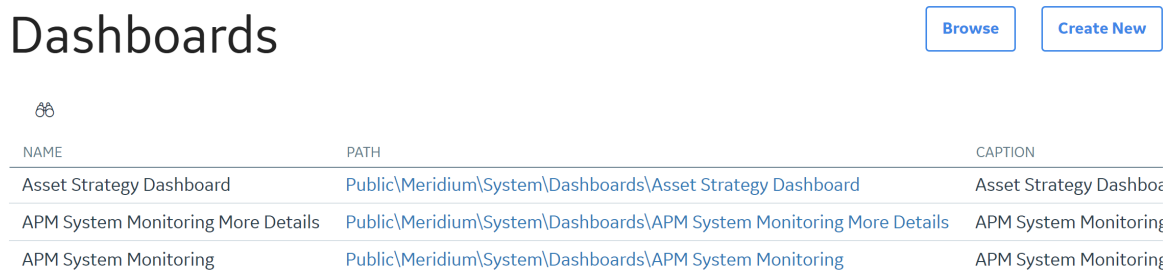
## Overview of General Dashboards

A dashboard is a GE Digital APM Catalog item that can be used to display summary information about the data in your GE Digital APM system and provide a way to navigate to other areas in GE Digital APM.

## Access the Dashboards page

### Procedure

In the module navigation menu, select **Tools > General Dashboards**. The **Dashboards** page appears, displaying a table of dashboards.



The screenshot shows the 'Dashboards' page with a search icon and two buttons: 'Browse' and 'Create New'. Below is a table with three columns: NAME, PATH, and CAPTION.

NAME	PATH	CAPTION
Asset Strategy Dashboard	Public\Meridium\System\Dashboards\Asset Strategy Dashboard	Asset Strategy Dashbo
APM System Monitoring More Details	Public\Meridium\System\Dashboards\APM System Monitoring More Details	APM System Monitoring
APM System Monitoring	Public\Meridium\System\Dashboards\APM System Monitoring	APM System Monitoring

**Note:** Dashboards created or accessed from the **Dashboards** page appear in the table. The table contains the last 25 dashboards that were accessed.

## Access a Dashboard

### About This Task

This topic describes how to access a dashboard from the **Dashboards** page. In the **Dashboards** page, you can access a dashboard that was recently accessed or search for a dashboard that is stored in the catalog.

### Procedure

- Access a dashboard that was recently accessed.
  1. Access the **Dashboards** page.
  2. In the table, in the **Path** column, select the link in the row that contains the dashboard that you want to access.

The dashboard opens in a new tab.
- Access a dashboard from the catalog.
  1. Access the **Dashboards** page.
  2. Select **Browse**.

The **Select a dashboard from the catalog** window appears.
  3. Go to the folder that contains the dashboard that you want to access.
  4. Select the dashboard that you want to access, and then select **Open**.

The dashboard opens in a new tab.

## General Dashboards Workflow

This topic provides a basic workflow for using this module, as well as links to the available procedures, concepts, and reference topics.

### General Dashboards Workflow

1. [Create a new dashboard](#).
2. [Add widgets to the dashboard](#), and configure the content of the widget based on the type of widget that you created.
3. [Configure the layout of the widgets](#).

# Chapter 2

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## Dashboards

### Topics:

- [About Dashboards](#)
- [Access and Modify the Dashboard Configuration](#)
- [Create a New Dashboard](#)
- [Filter Dashboard Content](#)
- [Export a Dashboard](#)
- [Set a Dashboard as the Home Dashboard](#)



## About Dashboards

Dashboards are stored in the Catalog, and they are displayed on the **Dashboard** page. The content of each dashboard is determined by queries that define what should be displayed on the dashboard. Throughout this documentation, we use the term dashboard to refer to the dashboard Catalog item and its underlying queries that are displayed on the **Dashboard** page.

Dashboard Catalog items store configurable widgets. The term widget is used in the GE Digital APM documentation to refer to [dashboard widgets](#), their configuration options, and default layouts.

GE Digital APM includes a set of baseline dashboards that are specific to certain modules and work processes. If you do not specify a default dashboard in GE Digital APM, the APM Foundation dashboard will be set as your default dashboard.

## Access and Modify the Dashboard Configuration

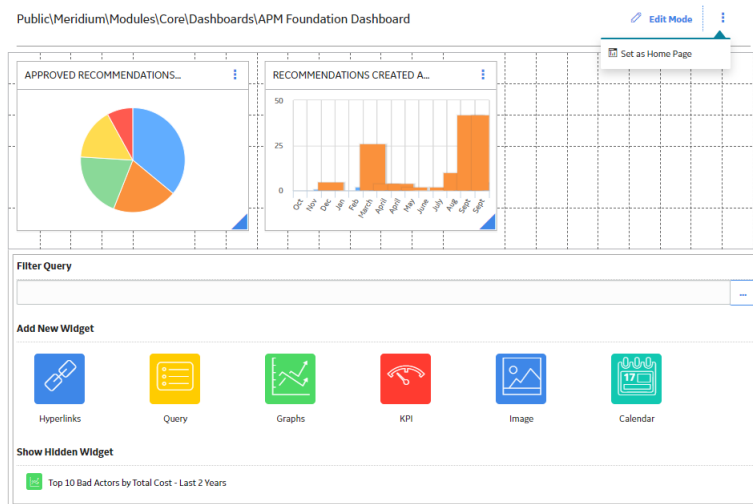
### Procedure

1. Open an existing dashboard.


-or-

[Create a new dashboard.](#)

2. In the upper-right corner of the page, select **Edit Mode**.



Depending on your security permissions, the following options appear:

- In the upper-right corner of each widget, select  to display the following menu options:
  - Edit: Displays the **Edit Widget** window for the dashboard.
  - Hide: Hides the widget from the dashboard.
  - Remove: Deletes the widget from the dashboard.
- **Filter Query** : Displays a window with prompts by which to filter query results.
- **Add New Widget** : Displays buttons for each widget type.

- **Show Hidden Widgets** : Displays a list of widgets that are hidden from the dashboard. This list is displayed to all users. You can redisplay a widget that appears in this list.

**Tip:** You can [move widgets](#) by selecting them and then dragging-and-dropping them in your desired location. You can also [resize widgets](#) by selecting the border of the widget and adjusting its dimensions.

3. After making changes using the dashboard configuration options, select **Edit Mode**.

The changes made to the dashboard are saved.

## Create a New Dashboard


### Procedure

1. [Access the Dashboards page](#).
2. In the upper-right corner of the **Dashboards** page, select **Create New**.  
The **Save As** window appears.
3. In the **Catalog** pane, navigate the hierarchy to determine the type of dashboard that you want to create.  
A grid appears in the workspace.
4. Under the grid, complete the required fields.
  - In the **Name** box, enter a unique file name for the new dashboard.
  - In the **Caption** box, enter unique text to identify the new dashboard.
  - Optionally, in the **Description** box, you can enter an explanation of the new dashboard.
5. Select **Save**.

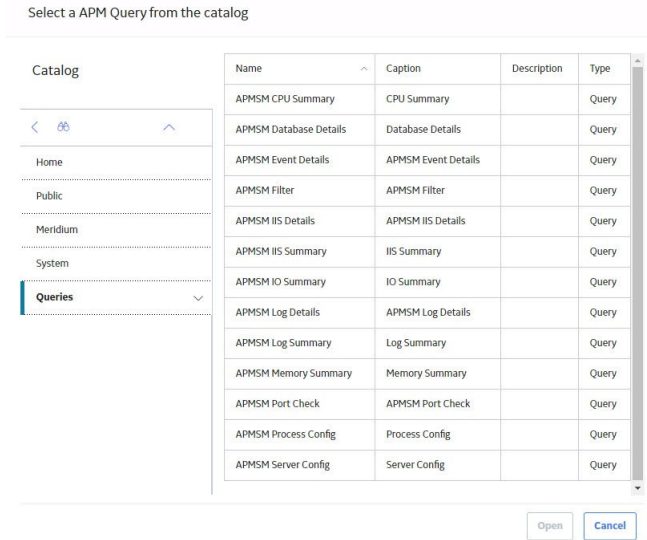
A blank dashboard appears on the **Dashboard** page, and the dashboard is saved to the Catalog.




## Filter Dashboard Content

### Procedure

1. [Access the dashboard configuration options](#).
2. In the **Filter Query** section, select .
3. In the hierarchy, navigate to the folder that contains the query by which you want to filter the dashboard.

The queries by which you can filter the dashboard appear on the window.



- In the grid, select the query, and then select **Open**.  
The dashboard appears, displaying the selected query in the **Filter Query** section.
- In the upper-left corner of the page, select  .  
If the  does not appear on the upper-left corner of the page, then, in the upper-right corner of the page, select **Edit Mode**, and then select **Edit Mode** again. This will cause the  button to appear. The **Enter Parameter Values** window appears.
- Using the options on the window, configure values by which to filter the query results, and then select **Done**.  
The dashboard content is filtered according to the selected parameters.


## Export a Dashboard

### About This Task

You can export the contents of a dashboard page to a PDF file so that you can create a report for analysis of the data.


**Note:** This feature is also available in the home dashboard.

### Procedure

- Access a dashboard.
- Select  , and then select **Export to PDF**.  
The **Print** window appears.  
**Note:** The **Export to PDF** option is not available in the edit mode.
- Select **Save as PDF** as the destination, and then select **Save**.  
The **Save As** window appears.
- Select a location for the file, enter a name for the file, and then select **Save**.  
The contents of the dashboard are saved as a PDF document to the selected location on your computer.


# Set a Dashboard as the Home Dashboard

## About This Task

The home dashboard is the first display that appears when GE Digital APM opens or when you select  from the top navigation bar. You can set any existing dashboard as your home page.

**Note:** Selecting a dashboard as your main dashboard does not affect any other users.

## Procedure

1. [Access a dashboard.](#)
2. Select , and then select **Set as Home Page**.  
The **Set as Home Page** window appears.
3. Select **Yes**.  
The dashboard is set as your home dashboard.

# Chapter 3

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## Dashboard Widgets

### Topics:

- [About Dashboard Widgets](#)
- [About User Display Preferences](#)
- [About Hyperlink Widgets](#)
- [About Query Widgets](#)
- [About Graph Widgets](#)
- [About KPI Widgets](#)
- [About Image Widgets](#)
- [About Calendar Widgets](#)
- [Add a Widget](#)
- [Refresh a Widget](#)
- [Access the Widget Source](#)
- [Arrange Widgets](#)
- [Resize a Widget](#)
- [Modify a Widget](#)
- [Hide a Widget](#)
- [Display a Widget](#)
- [Access a Widget in a New Tab](#)
- [Remove a Widget](#)

## About Dashboard Widgets

The content of a dashboard is displayed in various widgets on the **Dashboard** page. The number of widgets displayed on the page and their content depends on information defined by the user who last saved the dashboard.

Each dashboard widget has:

- **A read-only view**, which is displayed to all users that are members of the appropriate module-level Security Groups.
- The **Edit Widget** window, which can be accessed only by users that have Edit permissions to the Catalog folders that store a dashboard. In order for these users to make changes to the dashboard widget via the **Edit Widget** window, they must be members of the appropriate module-level Security Groups.

Throughout this documentation, we use the term dashboard widget or widget to refer to the read-only view of a widget.

**Note:** The RBI Risk Matrix widget, is specific to the baseline **Mechanical Integrity** dashboard, and dashboards that are used by Mechanical Integrity users when the Risk Based Inspection license is active. Because modifying this widget is not recommended, documentation for working with the **Edit Widget** window for this widget is not provided.

The following widget types are available:

- [Hyperlink widgets](#)
- [Query widgets](#)
- [Graph widgets](#)
- [KPI Widgets](#)
- [Image Widgets](#)
- [Calendar Widgets](#)

## About User Display Preferences

The term user display preferences refers to the way that a dashboard looks when you complete one or more of the following tasks:

- [Hide or display a dashboard widget.](#)
- [Modify the size of a dashboard widget.](#)
- [Arrange dashboard widgets.](#)

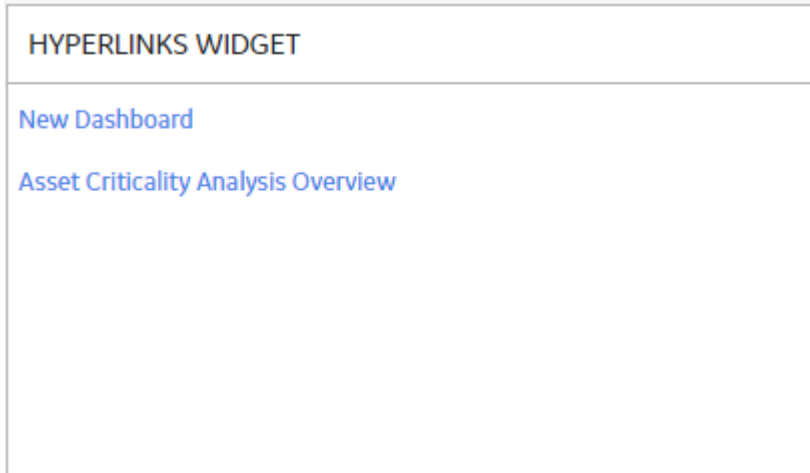
Your user display preferences are retained when another user does either of the following:

- [Adds a new widget.](#)
- [Modifies the content of an existing widget.](#)

When another user [removes a widget](#) from the dashboard for which you have specified display preferences, your display preferences will be retained; however the widget that was removed will no longer be displayed.

## About Hyperlink Widgets

A Hyperlink dashboard widget displays a list of hyperlinks, as specified by the user. The following image shows an example of a Hyperlink widget that has been configured for a dashboard.



**Hyperlink** widgets support both internal and external GE Digital APM URL syntax.


**Tip:** For more information, refer to the URLs section of the documentation.

### Edit Widget Window

The **Edit Widget** window for a Hyperlink widget provides options that are used to configure the content that is displayed on a Hyperlink widget. The **Edit Widget** window contains the following fields:



Edit Widget



**Name**

Hyperlinks Widget 

[Add New](#) [Browse](#)



**Text**



New Dashboard  

**URL**  

http://server/servername.index.html#3;rte=dashboard;rte=assets/hierarchy/-1;rte=dashboard;rte=dashboard/4867701






**Text**

Asset Criticality Analysis Overview  

**URL**  

http://server/servername.index.html#3;rte=home;rte=assets/hierarchy;rte=dashboard;rte=aca/overview

[Cancel](#) [Save](#)

- **Name:** Specifies the label for the widget. You can select  to specify localized values for the widget label.
- **Text:** Specifies the hyperlink label that will appear on the widget. You can select  to specify localized values for the widget label.
- **URL:** Specifies the URL that you want to use.
-  : Deletes the selected hyperlink from the widget.
-  and  : Used to move the selected item up or down in the list of hyperlinks.

## About Query Widgets

A Query dashboard widget displays query results, as specified by the user. The following image shows an example of a Query widget that has been configured for a dashboard.





EQUIPMENT WITH SITE MAPPING			🔗 ↺
IT	EQUIPMENT TECHNICAL NUMBER ↓	EQUIPMENT SHORT DESCRIPTION	EQUIPMENT ID
	G0202-097	PUMP - FCC SLIDE VALVE HYDRAULIC SKID	00000000010000056
	G0200-097	PUMP - FCC SLIDE VALVE HYDRAULIC SKID	00000000010000054
	G0094-097	PUMP - HCO CIRCULATION	00000000010000052
	G0093-097	PUMP - MAB MOTOR COOLANT CIRCULATION	00000000010000051
	G0092-097	PUMP - MAB MOTOR COOLANT CIRCULATION	00000000010000050
	G0086-097	PUMP - FCC MAIN COLUMN SLURRY CIRCULATIO	00000000010000046
	G0085-097	PUMP - RAW OIL CHARGE	00000000010000045
	G0084-097	PUMP - RAW OIL CHARGE	00000000010000044
	G0069-097	PUMP - BFW CIRCULATING	00000000010000043
	G0063-097	PUMP - COOLING WATER BOOSTER	00000000010000042

Rows per page 50  200 500 201 - 300 of 1633 Results ← 1 2  4 5 ... 17 →

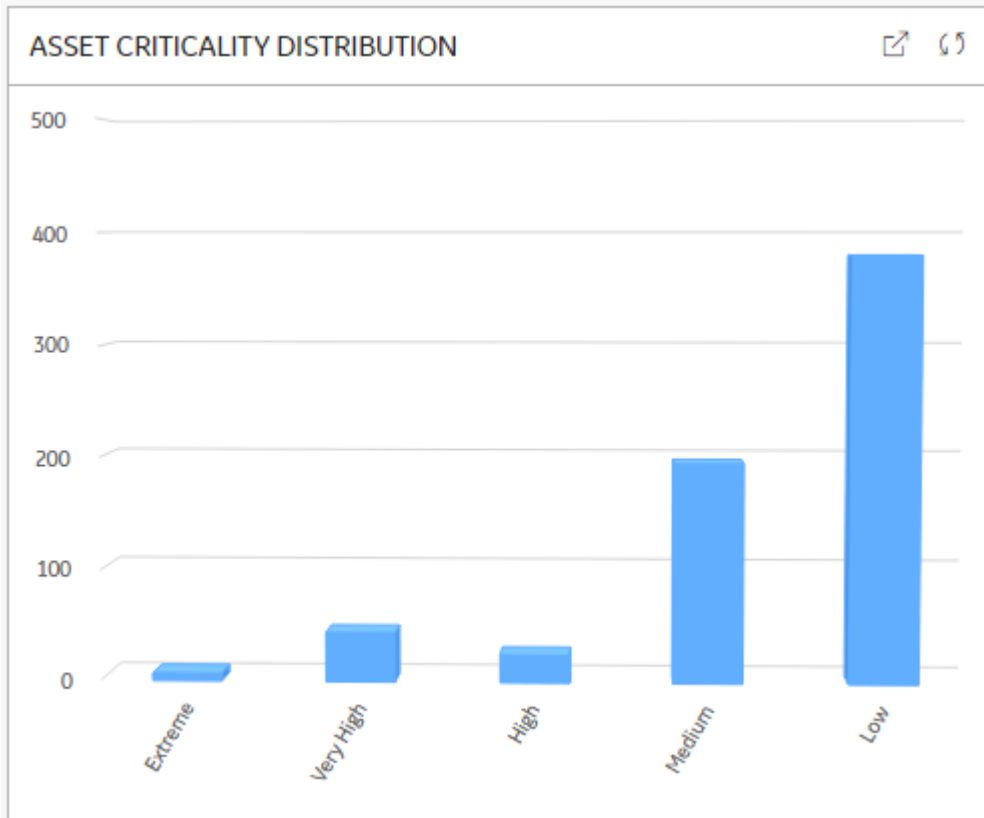
### Edit Widget Window

The **Edit Widget** window for a Query widget provides options that are used to configure the content displayed on a Query widget. The **Edit Widget** window contains the following items:

- **Name** : Specifies the label for the widget. You can select  to specify localized values for the widget label.
- **Path**: Specifies the Catalog location of the query whose results are displayed on the widget. You can select  to select a query from the Catalog.

## About Graph Widgets

A Graph dashboard widget displays a graphical representation of query results, as specified by the user. The following image shows an example of a Graph widget that has been configured for a dashboard.



### Edit Widget Window

#### Edit Widget

---

**Name**

Asset Criticality Distribution
🌐

**Path**


Public\Meridium\Modules\Asset Criticality Analysis\Graphs\Asset Criticality Distribution
...

Cancel

Save

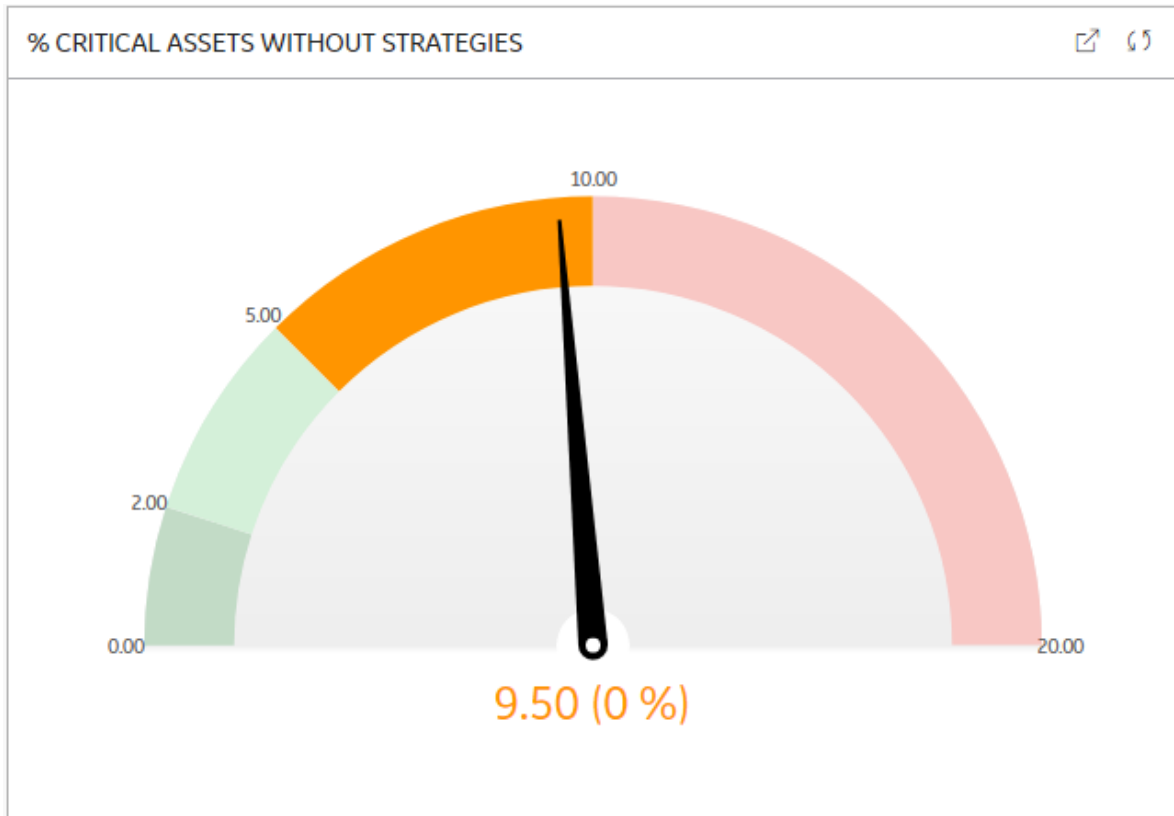
The **Edit Widget** window for a Graph widget provides options that are used to configure the content that is displayed on a Graph widget. The **Edit Widget** window contains the following fields:

- **Name:** Specifies the label for the widget. You can select 🌐 to specify localized values for the widget label.

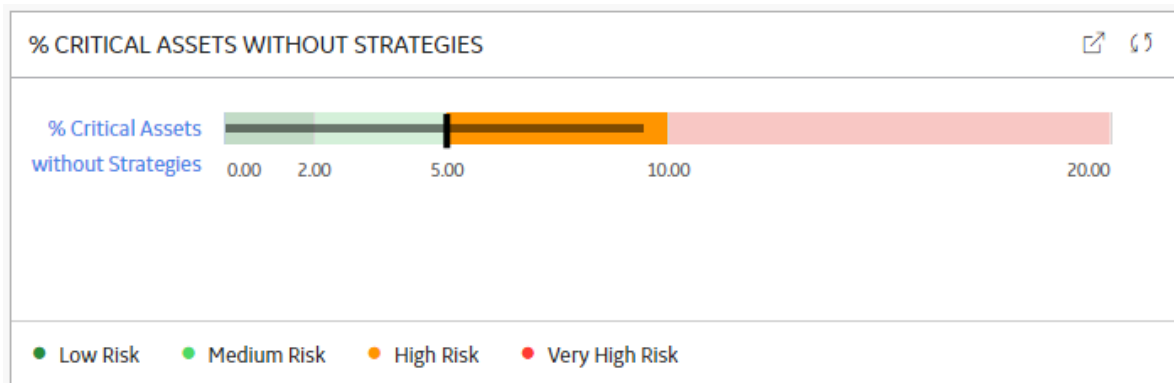
- **Path:** Specifies the Catalog location of the path whose results are displayed on the widget. You can select  to select a query from the Catalog.

## About KPI Widgets

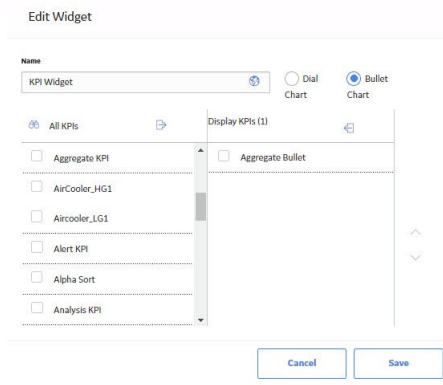
A KPI dashboard widget displays Key Performance Indicators, as specified by the user. You can choose to display Key Performance Indicators either as a dial or as a bullet chart. The following image shows an example of a **KPI** dial widget that has been configured for a dashboard.







The following image shows an example of a KPI bullet chart widget configured for a dashboard.



## Edit Widget Window





The **Edit Widget** window for a KPI widget provides options that are used to configure the content that is displayed on a KPI widget. The **Edit Widget** window contains the following fields:

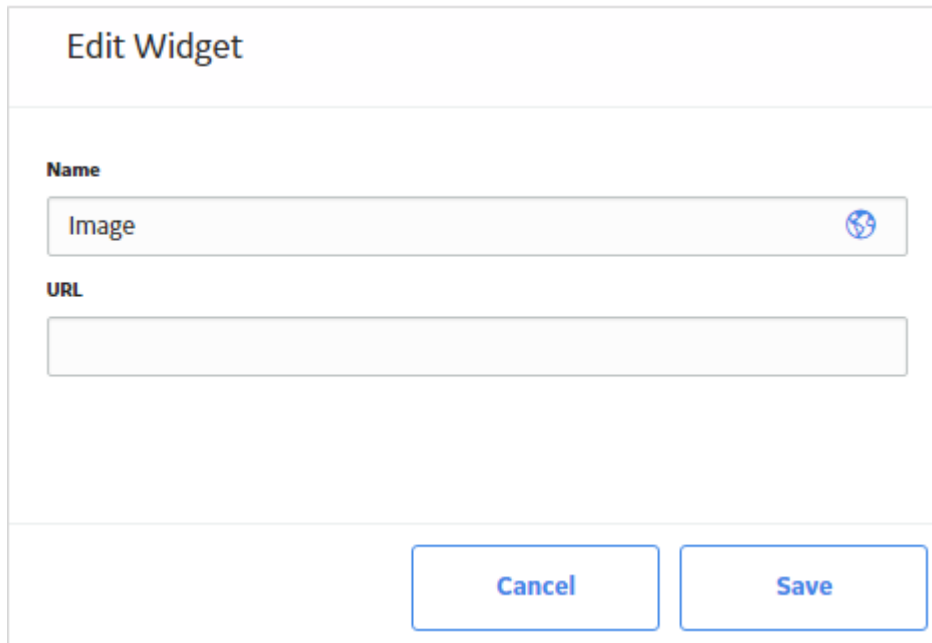
- **Name:** Specifies the label for the widget. You can select  to specify localized values for the widget label.
- **All KPIs** section: Displays the potential KPIs that could be displayed on the widget. You can select  to search for a specific KPI.
- **Display KPIs** section: Displays the KPIs selected to be displayed on the widget.
-  and  : Moves selected KPIs between the **All KPIs** and **Display KPIs** section.

## About Image Widgets

An Image dashboard widget displays a custom image, as specified by the user. The following image shows an example of an Image widget that has been configured for a dashboard.


H2 CONSUMPTION ACTION LEVELS  			
<b>Summary Table for Operations: H2 Consumption Action Levels</b>			
Consumption PSI/day	Estimated Time for a 2 psi decay	Status	Action
0.75 - 2 psi / day	150 - 77 hours*	<b>Normal</b>	Maintain normal monitoring program
Increase in consumption	Change	Indicator	Investigate for cause, notify Operations Superintendent.
> 2.75 psi / day	18 hours	<b>Caution</b>	Investigate for cause, notify Operations Superintendent.
> 9.3 psi / day	5 hours	<b>Danger</b>	Identify source, mitigate leakage volume; Investigate for cause, notify Ops Superintendent. Remove unit from service in a controlled manner

## Edit Widget Window



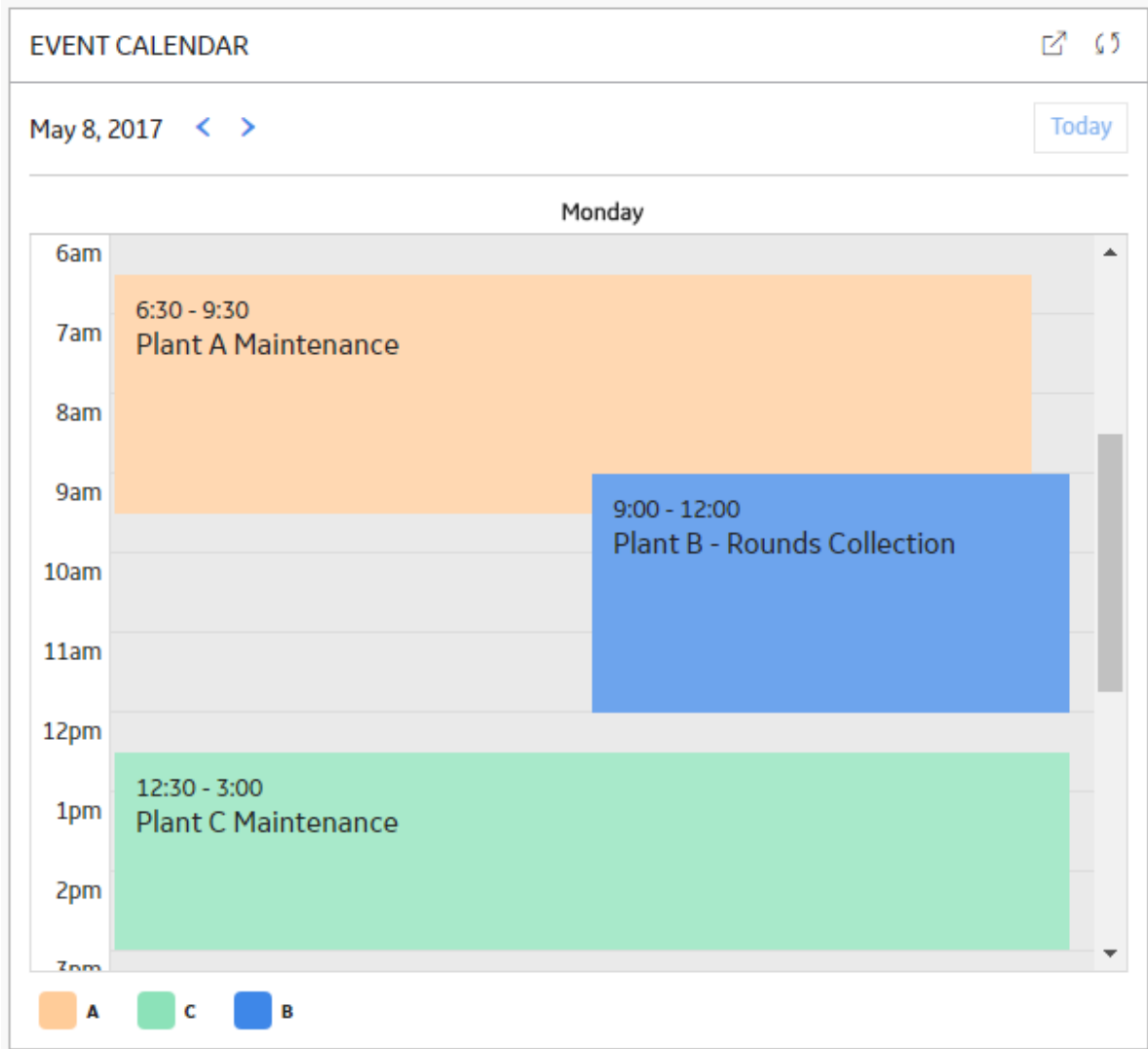
The screenshot shows a dialog box titled "Edit Widget". It contains two input fields. The first field is labeled "Name" and has the text "Image" entered. To the right of this field is a globe icon. The second field is labeled "URL" and is empty. At the bottom of the dialog, there are two buttons: "Cancel" and "Save".


The **Edit Widget** window for an Image widget provides options that are used to configure the content that is displayed on an Image widget. The **Edit Widget** window contains the following fields:

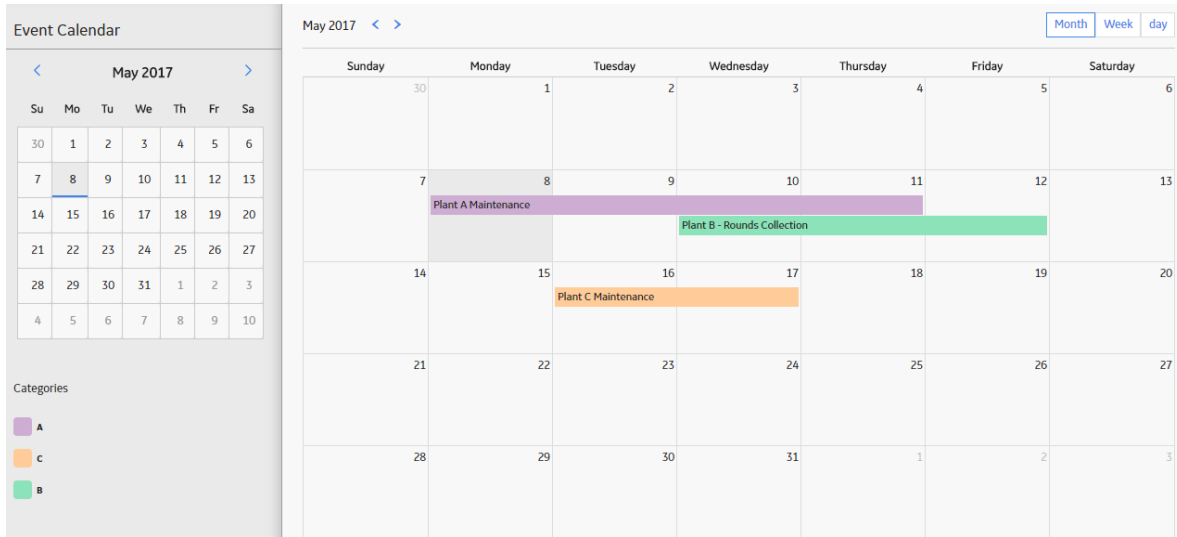
- **Name:** Specifies the label for the widget. You can select  to specify localized values for the widget label.
- **URL:** Displays the URL where the custom image is located. The types of image file supported depend on the type of web browser used with your particular instance of GE Digital APM.

## About Calendar Widgets

A Calendar dashboard widget displays a list of events based on a query for a specific time period. The following image shows an example of a Calendar widget that has been configured for a dashboard. At any point in time, the events displayed on the calendar widget are for a particular day.



If you select , the widget will expand into a larger view, as seen in the following image. To modify the display, you can select the **Month**, **Week**, or **Day** button.



## Edit Widget Window

### Edit Widget

---

**Name**

**Path**

**Event Mappings**

<b>Title Column</b>	<b>Start Date Column</b>
<input type="text" value="Name"/>	<input type="text" value="Start Date"/>
<b>Category Column</b>	<b>End Date Column</b>
<input type="text" value="Event Type"/>	<input type="text" value="Event Date"/>
<b>Category Color Column</b>	
<input type="text" value="Select Column..."/>	

The **Edit Widget** window for a Calendar widget provides options that are used to configure the content that is displayed on a Calendar widget. The **Edit Widget** window contains the following fields:

- **Name:** Specifies the label for the widget. You can select to specify localized values for the widget label.
- **Path:** Specifies the Catalog location of the query whose results are displayed on the widget. You can select to select a query from the Catalog.
- **Event Mappings section:** Specifies how the columns in the specified query correspond to the values required by the Calendar widget. This section contains the following fields, each of which contain a list of the fields that are defined in the query:

- **Title Column:** The query column whose value will be displayed as the title of the calendar event. If the query column is defined as a hyperlink, then, in the Calendar widget, you can select the event to navigate to the defined location.
- **Start Date Column:** The query column whose value will be displayed as the start date of the calendar event.
- **End Date Column:** The query column whose value will be displayed as the end date and time of the calendar event. If there is no value for end date, then the event end time will be set to 15 minutes.
- **Category Column:** The query column whose value will be displayed as the event category for the calendar event. You can use the values in this column to filter the calendar events on the **Calendar** page.
- **Category Color Column:** The query column whose value will be displayed as the color for the calendar event. Each category has a predefined color. If no color is specified in the query, then the default colors will be displayed.

## Add a Widget

### Procedure

1. [Access the dashboard configuration options.](#)
2. In the **Add New Widgets** section, select one of the following widget types that you want to add to the dashboard:
  - [Hyperlink](#)
  - [Query](#)
  - [Graph](#)
  - [KPI](#)
  - [Image](#)


The **Edit Widget** window appears, where you can [specify properties for the new widget.](#)

### Next Steps

- [Move a Widget](#)

## Refresh a Widget

### Procedure

1. [Access the dashboard](#) that contains the widget you want to refresh.
2. In the upper-right corner of the widget, select . The widget is updated to reflect the most recent data.




## Access the Widget Source

### About This Task

The source of a widget depends on the widget type. For example, if you access the source of a graph widget, the graph will open in the **Graph Result** workspace. The source of a widget can be accessed for [Query](#) widgets, [Graph](#) widgets, and [KPI](#) widgets.

### Procedure

1. [Access the dashboard](#) that contains the widget whose source you want to view.
2. In the upper-right corner of the widget, select .

The contents of the widget open in a new tab displaying the corresponding workspace.

## Arrange Widgets

### Procedure

1. [Access the dashboard configuration options](#).
2. Drag the widget to the location where you want it in the canvas.  
The widget is moved to the specified location.


## Resize a Widget

### Procedure

1. [Access the dashboard configuration options](#).
2. Drag the lower-right corner of the widget that you want to resize until the widget is the size you want.  
The widget is resized.


## Modify a Widget

### Procedure

1. [Access the dashboard configuration options](#).
2. In the widget you want to modify, select , and then select **Edit**.  
The **Edit Widget** window appears.
3. As needed, modify the properties of the widget, and then select **Save**.  
The modified widget is saved.

## Hide a Widget

### Procedure

1. [Access the dashboard configuration options.](#)
2. In the widget that you want to hide, select , and then select **Hide**.  
A message appears, asking you to confirm your selection to hide the widget.
3. Select **OK**.  
The widget is hidden from the dashboard.


## Display a Widget

### Procedure

1. [Access the dashboard configuration options.](#)
2. In the **Show Hidden Widgets** section, select the widget that you want the dashboard to display.  
The widget appears in the dashboard.


## Access a Widget in a New Tab

### Procedure

1. [Access the Dashboard](#) containing the widget that you would like to access in a new tab.
2. On the dashboard widget, select .  
The selected widget appears in a new tab.

## Remove a Widget

### Procedure

1. [Access the dashboard configuration options.](#)
2. In the widget that you want to remove, select , and then select **Remove**.  
A message appears, asking you to confirm your selection to remove the widget.
3. Select **OK**.  
The widget is removed from the dashboard.

# Chapter 4

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## Reference

### Topics:

- [Dashboard URLs](#)

## Dashboard URLs

There is one URL route associated with dashboards: **dashboard**. The following table describes the various paths that build on the route, and the elements that you can specify for each.

Element	Description	Accepted Value(s)	Notes
dashboard: Opens the <b>Dashboards</b> page.			
dashboard/<CatalogItemKey>: Opens the <DashboardName> page for a specific dashboard.			
<CatalogItemKey>	Specifies the key for the dashboard that you want to open.	Any numeric Entity Key that corresponds to an existing dashboard.	This element is required to open an existing dashboard from a URL.
Parameter Name = Parameter Value	Specifies the Parameter Name and Parameter Value of the Dashboard that you want to open.	Parameter Names and Parameter Values	#dashboard/ <b>Catalog Item Key?Parameter Name=Parameter Value</b>
dashboard/<CatalogItemPath>: Opens the<DashboardName>page for a specific dashboard.			
<CatalogItemPath>	Specifies the path for the dashboard that you want to open.	The Catalog path and name of the dashboard that you want to open.	This element is required to open an existing dashboard from a URL.

### Examples: Dashboard URLs

Example URL	Destination
#dashboard	<b>Dashboards</b> page.
#dashboard /1234567	<b>Dashboard</b> page for the dashboard with the Catalog Item Key 1234567.
#dashboard ?path=Public\AQA Registry\AQA REG Dashboards \AQA Image Dashboard	Dashboard page for the AQA Image Dashboard.
#dashboard/64257658406?enty_key=64257667886	Dashboard page for the dashboard with the Catalog Item Key 64257658406, Parameter Name enty_key, and Parameter Value 64257667886.