General Dashboards

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Chapter 1

Overview

Topics:

- Overview of General Dashboards
- Access the Dashboards page
- Access a Dashboard
- General Dashboards Workflow

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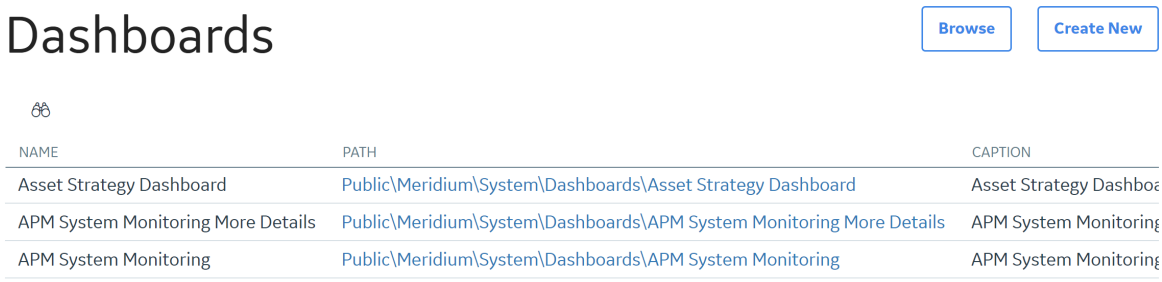
Overview of General Dashboards

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

Access the Dashboards page

Procedure

In the **Applications** menu, navigate to **TOOLS** > **General Dashboards**.
The **Dashboards** page appears, displaying a table of dashboards.



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.

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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.

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Chapter 2

Dashboards

Topics:

- About Dashboards
- About Filtering Dashboard Content
- About Filter Parameter Value Precedence
- Access and Modify the Dashboard Configuration
- Create a New Dashboard
- Configure The Responsive Dashboard Layout
- Filter Dashboard Content
- Export a Dashboard
- Set a Dashboard as the Home Dashboard

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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 APM documentation to refer to dashboard widgets, their configuration options, and default layouts.

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 APM, the APM Foundation dashboard will be set as your default dashboard.

About Filtering Dashboard Content

The dashboard content that is displayed in query, calendar, and graph widgets can be filtered according to the criteria defined in the query selected in the **Filter Query** section of the dashboard edit view. This query defines the content of the **Enter Parameter Values** window that appears when you open a dashboard.

The filter parameter values can be defined in the URL that you use to access the dashboard. If you do not specify the parameters in the URL, the default values specified in the underlying query, or your previously used values, which are stored as a user preference are used.

Important: The filter criteria that is prompted in the queries selected in the query-based widgets on the dashboard must be included in the filter query selected in the **Filter Query** section of the dashboard edit view, and must use the same parameter IDs. If any criterion used in a widget query is not included in the filter query, or if the parameter IDs do not match, the behavior of the **Enter Parameter Values** window is not as expected and content is not filtered accordingly.

About Filter Parameter Value Precedence

The following rules are applied to determine how filter parameter values are set when you access a dashboard:

- When you access the dashboard using a URL that specifies filter parameter values, the specified values are always used. For example, when you access the URL `#dashboard/64252603546?asset=345728389&days=90`, the dashboard with key 64252603546 is opened and the filter parameter values are set to asset=345728389 and days=90.

  Note: After you access the dashboard using a URL that specifies filter parameter values, you can still modify the filter parameter values. However, if you refresh your browser, the filter parameter values will revert to the values specified in the URL.
- When you access the dashboard using a URL which does not specify filter parameters, or you access a dashboard from the Dashboard page:
  - Your stored user preferences are used. For example, when you access the URL `#qdetail/64252603546`, the query opens in the results-only view and your stored user preferences are used to set the parameter values.
  - If you do not have stored user preferences, the default parameter values specified in the underlying queries are used.

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- If default parameter values are not specified in the underlying queries:
  - For Asset Hierarchy parameters, the global asset context, that is, the asset or asset group currently selected in the Assets page, is used.
  - For other parameters, the **Enter Parameter Values** window appears. Enter the values you want to use and select **Done** to set the parameter values.

Note: When you access a graph or query in the results-only view, for example when you select **Open in New Tab** from a dashboard widget, the page uses the same filter component as the dashboard, and the behavior of filter parameters is similar.

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. You can also configure responsive layouts to support devices with different screen sizes.
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.

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- 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.

Configure The Responsive Dashboard Layout

About This Task

You can configure the Responsive Dashboard layout to optimize the user experience. You can configure upto 5 layouts to suit devices with different screen sizes by adjusting the location and size of the widgets as in the following table:

Device	Supported screen width	Layout grid columns	Minimum widget size
Phone	Up to 600 pixels wide	4	4 columns x 4 rows
Small Tablet	Between 600 and 767 pixels wide	8	6 columns x 4 rows
Tablet	Between 768 and 1023 pixels wide	12	6 columns x 4 rows
Desktop screen	Between 1024 and 1799 pixels wide	24	6 columns x 4 rows
HD screen	More than 1800 pixels wide	24	6 columns x 4 rows

Note: If you do not configure the layout for a given device type, its dashboard layout will change with the screen width to its default resulting in overlapping of widgets.

Procedure

1. Open an existing dashboard.

   Or

   Create a new dashboard.
2. In the upper-right corner of the page, select **Edit Mode**.
3. Adjust the browser width to match the device type for which you want to optimize the layout.

   Tip: You can use the mobile layout option in your browser's development tools to facilitate dashboard layout optimization. Set your browser width to the supported screen width lesser by 20 pixels. For example, to simulate the Phone experience, set the browser width to 579 pixels or less.
4. Resize and arrange the widgets to optimize the dashboard layout.
5. Repeat steps 3 and 4 for each device type for which you want to optimize the layout.
6. After making changes to the dashboard layout, select **Edit Mode**.

   The changes made to the dashboard layout are saved.

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Filter Dashboard Content

Procedure

1. Access the dashboard configuration options.
2. In the **Filter Query** section, select .

   The **Select a query from the catalog** window appears.
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.
4. In the grid, select the query, and then select **Open**.
   The dashboard appears, displaying the selected query in the **Filter Query** section.
5. 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.
6. 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.

   Note: You can select (Open in New Tab) icon to open the selected query in the Design workspace.

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

1. Access a dashboard.
2. Select , and then select **Export to PDF**.
   The **Print** window appears.

   Note: The **Export to PDF** option is not available in the edit mode.
3. Select **Save as PDF** as the destination, and then select **Save**.
   The **Save As** window appears.
4. 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.

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Set a Dashboard as the Home Dashboard

About This Task

The home dashboard is the first display that appears when 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.

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Chapter 3

Dashboard Widgets

Topics:

- About Dashboard Widgets
- 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

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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.

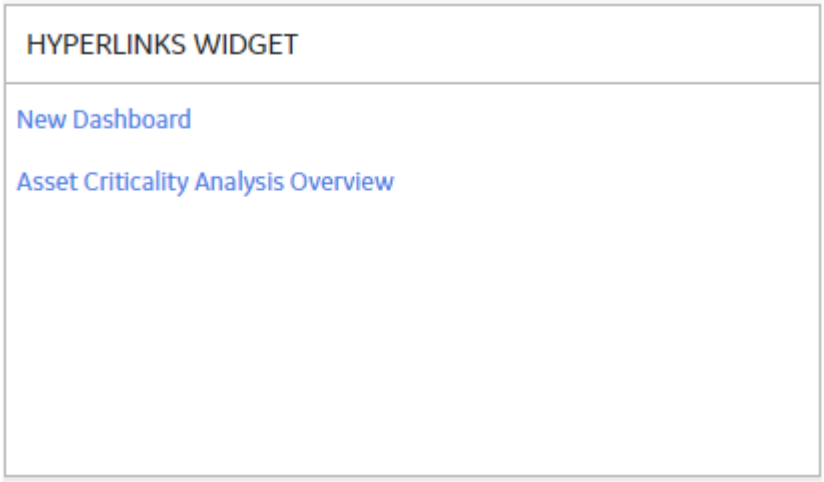
Note: The RBI Risk Matrix widget, is specific to the baseline **Mechanical Integrity** dashboard, and dashboards that are used by Mechanical Integrity users when the Risk Based Inspection license is active. Because modifying this widget is not recommended, documentation for working with the **Edit Widget**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



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Hyperlink widgets support both internal and external APM URL syntax.

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

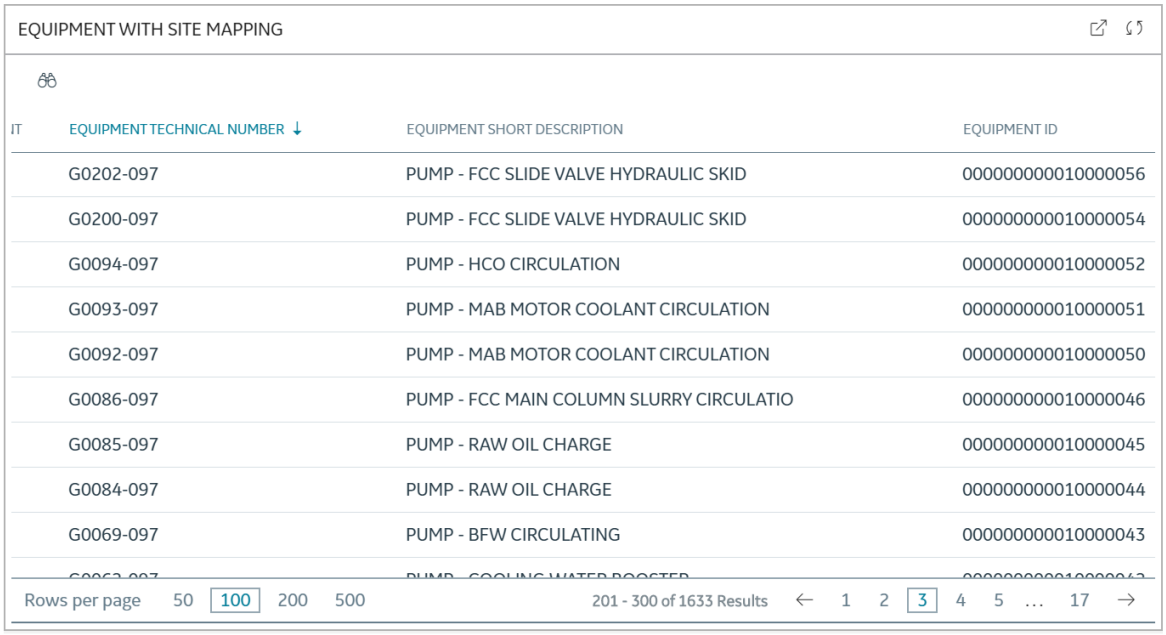
Edit Widget Window

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:

- **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 based on the values entered in the Enter Filter Parameters window. The following image shows an example of a Query widget.



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.

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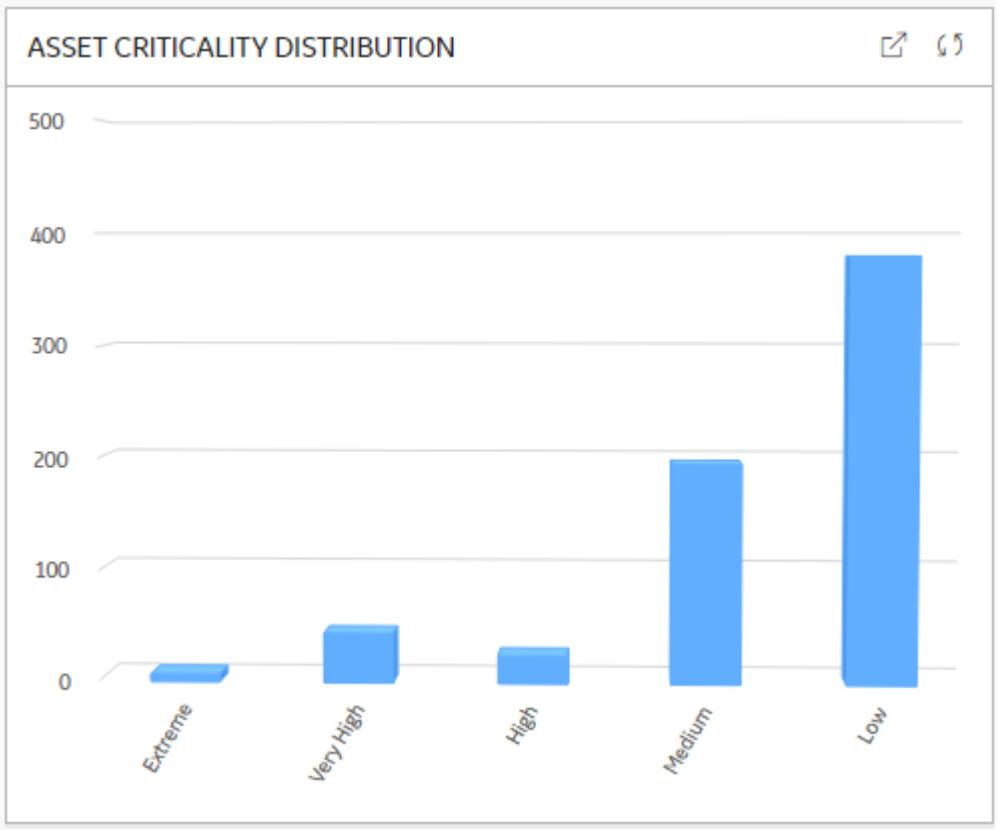
- **Path**: Specifies the Catalog location of the query whose results are displayed on the widget. You can select to open the selected query in the Design workspace.
- **Wrap Text**: Specifies how text is displayed in the query result grid. The Wrap Text option is selected by default. You can clear the selection to show text on a single line.

About Graph Widgets

A Graph dashboard widget displays a graphical representation of query results based on the values entered in the **Enter Filter Parameters** window. The following image shows an example of a Graph widget that has been configured for a dashboard.



Edit Widget Window

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 for which the results are displayed on the widget. You can select and select a query from the Catalog. You can also select to open the graph in the Graph Editor.

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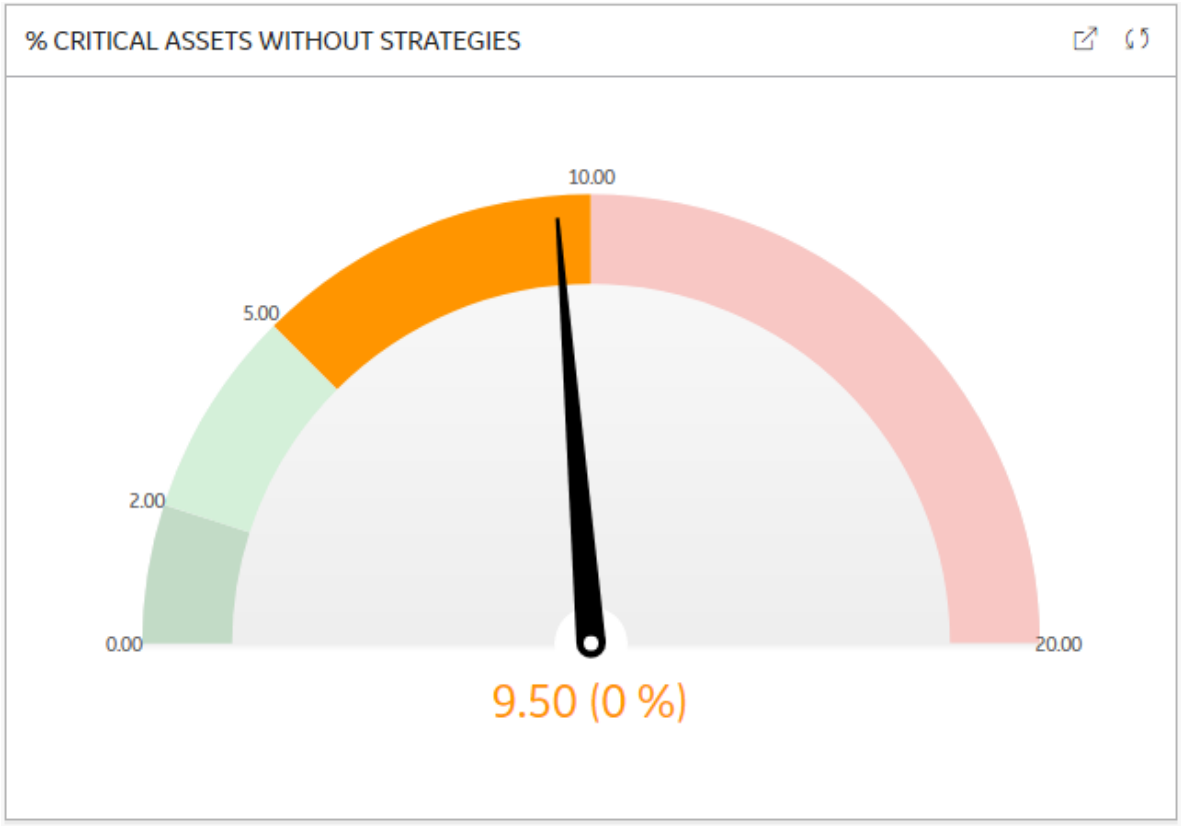
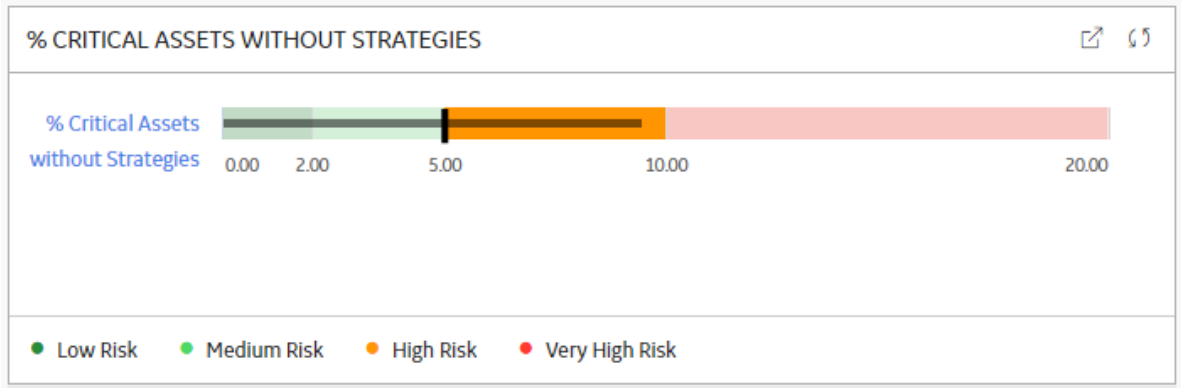
About KPI Widgets

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:

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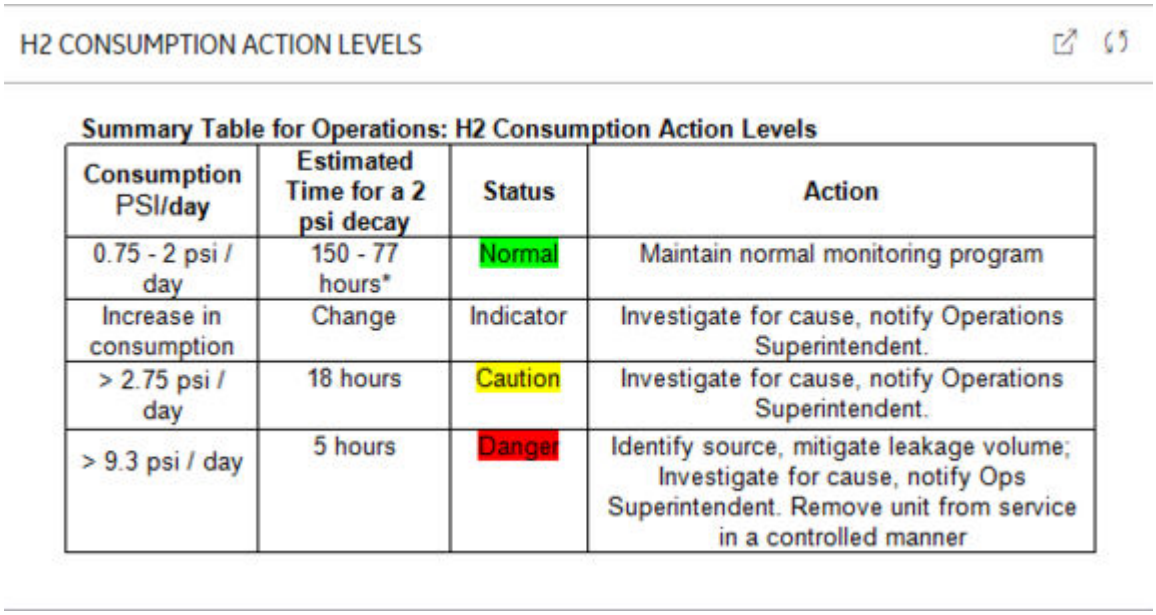
- **Name**: Specifies the label for the widget. You can select to specify localized values for the widget label.
- **All KPIs** section: Displays the potential KPIs that could be displayed on the widget. You can select to search for a specific KPI.
- **Display KPIs** section: Displays the KPIs selected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



Edit Widget Window

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 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.

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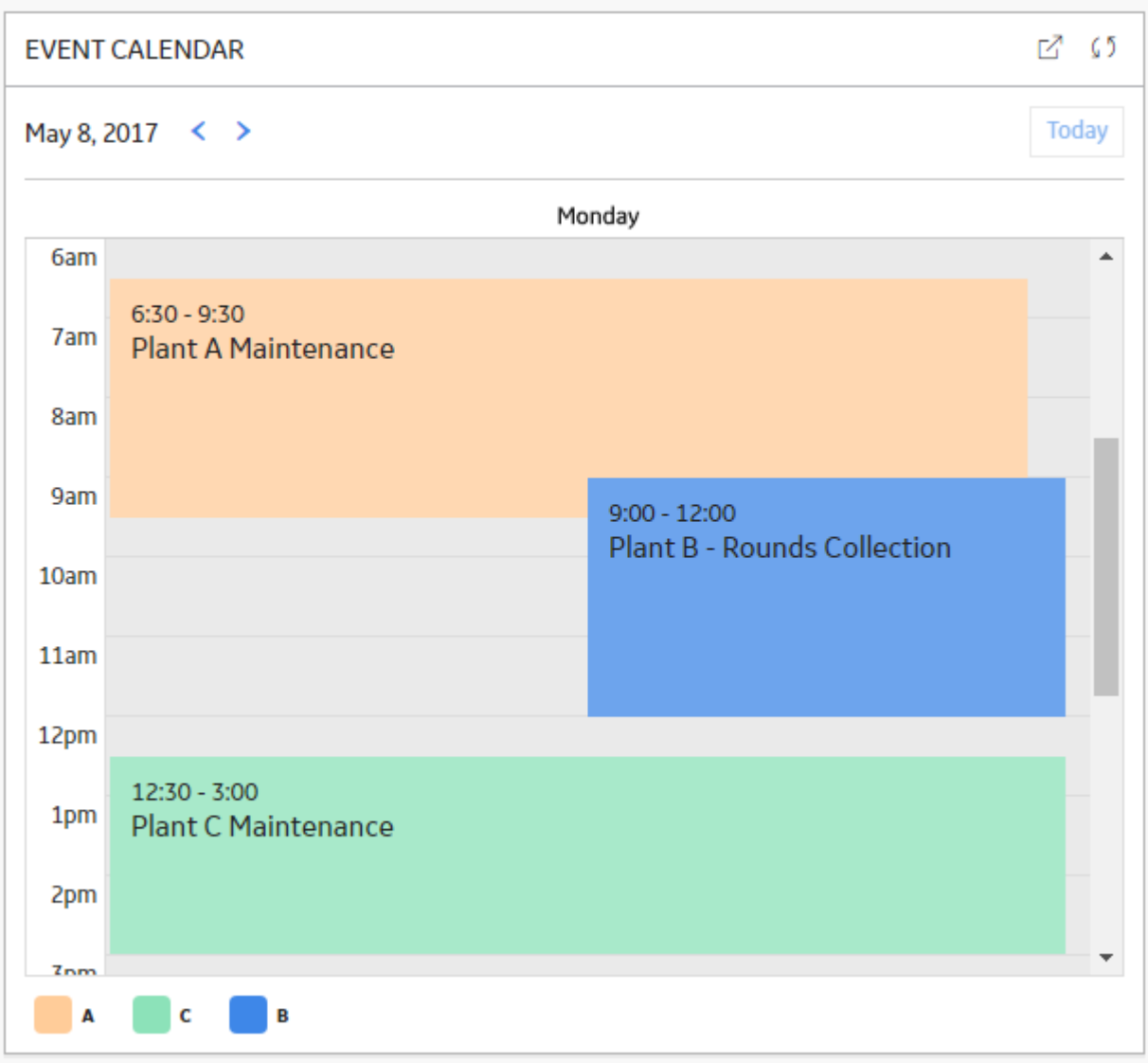

Tip: To expand the widget into a larger view, select . To modify the display, you can select the **Month**, **Week**, or **Day** button.

Edit Widget Window

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 (open in new window) icon to open the selected query in the Design workspace.
- **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:

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- **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.

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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

- To access the source of a KPI widget:
  1. Access the dashboard that contains the widget whose source you want to view.
  2. In the upper-right corner of the widget, select .

OR

- To access the source of a Query or Graph widget:
  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. 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.

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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 .

   Note: The selected filter parameter values are applied when you access a query or graph in a new tab.

   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.

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Chapter 4

Reference

Topics:

- Dashboard URLs

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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 **Dashboards** 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/**Catalog Item Key**?**Parameter Name**=**Parameter Value**
Parameter Name[] = Parameter Value	Specifies the multi-value Parameter Name and Parameter Value of the dashboard that you want to open.	Multi-value Parameter Names and Parameter Values	#dashboard/**Catalog Item Key?Parameter Name[]=value**
dashboard?path=<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.
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?**path=Catalog Item Path&Parameter Name=Parameter Value**
Parameter Name[] = Parameter Value	Specifies the multi-value Parameter Name and Parameter Value of the dashboard that you want to open.	Multi-value Parameter Names and Parameter Values	#dashboard?**path=Catalog Item Path&Parameter Name[]=Parameter Value**

Examples: Dashboard URLs

Example URL	Destination
#dashboard	**Dashboards** page.
#dashboard /1234567	**Dashboard** 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.

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Example URL	Destination
#dashboard/64257658406?enty_key=64257667886	Dashboard page for the dashboard with the Catalog Item Key 64257658406, Parameter Name enty_key, and Parameter Value 64257667886.
#dashboard/64257658406?keys[]=64257667886&keys[]=64257667894	Dashboard page for the dashboard with the Catalog Item Key 64257658406, Multi-value Parameter Name keys, and Parameter Values 64257667886 and 64257667894.

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