

# **Dashboards**

Universal Controller 7.7.x

© 2024 by Stonebranch, Inc. All Rights Reserved.

# Table of Contents

1	Dashboards .....	4
2	Home Dashboard .....	4
3	Home Dashboard .....	5
3.1	Overview .....	5
3.2	Home Dashboard Access.....	6
4	Dashboard Details.....	7
4.1	Overview .....	7
4.2	Accessing the Dashboards .....	7
4.3	Dashboard Security.....	8
4.4	Dashboard Tabs.....	8
4.5	Setting Order of Dashboard Tabs .....	8
4.6	Creating a Dashboard .....	8
4.7	Editing a Dashboard.....	11
4.8	Copying a Dashboard .....	12
4.9	Renaming a Dashboard .....	12
4.10	Deleting a Dashboard .....	13
4.11	Setting a Default Dashboard .....	13
4.12	Changing Dashboard Visibility .....	14
4.12.1	Visible To.....	15
4.12.2	Visible By Default .....	15
4.12.3	Show/Hide.....	16
4.13	Refreshing Dashboard Data .....	16
4.13.1	Automatic Refresh .....	16
4.13.2	Manual Refresh .....	16
4.14	Promoting a Dashboard .....	17
4.15	Closing the Dashboards .....	17

# 1 Dashboards

---

[Overview](#)

[Accessing the Dashboards](#)

[Creating a Dashboard](#)

[Editing a Dashboard](#)

[Setting a Default Dashboard](#)

# 2 Home Dashboard

---

[Home Dashboard](#)

### 3 Home Dashboard

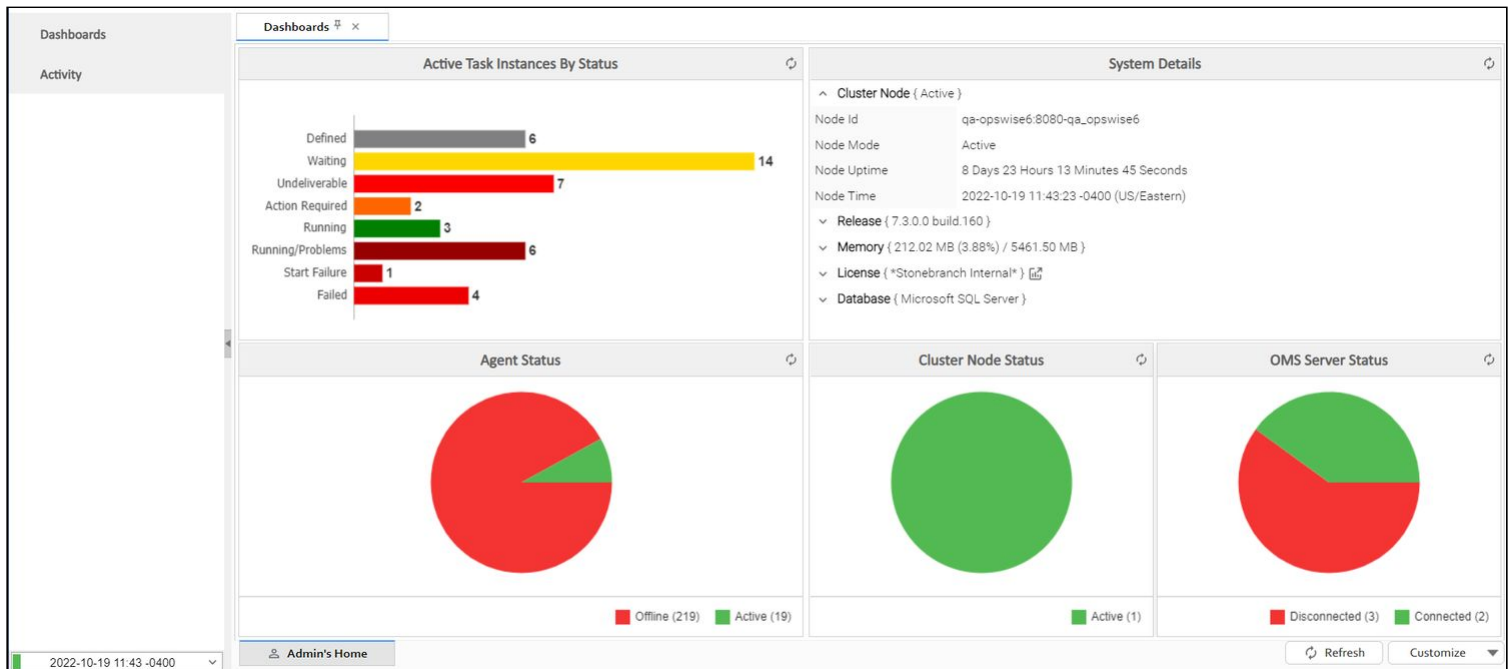
- [Overview](#)
- [Home Dashboard Access](#)

#### 3.1 Overview

When you log in to Universal Controller, the Universal Controller Home dashboard - which is a system-defined [Dashboard](#) - displays.

#### Warning

Although you can set any Dashboard as your Home dashboard, it is NOT recommended (see the [Use Default Dashboard For Home](#) user preference).



The Dashboards tab at the top of the page indicates that you are on the Dashboards page. The tabs at the bottom of the page represent all Dashboards, including the Dashboard currently displayed.

The Dashboards tab, and the tabs for all Dashboards, display for every Dashboard, not just the Home dashboard.

## 3.2 Home Dashboard Access

Dashboards - including the Home dashboard - stay open throughout your Controller session, unless you manually close them by clicking the **x** icon in the Dashboards tab.

No matter which other page(s) you navigate to in the user interface, the **Dashboards** tab always displays at the top of the page, allowing you to return there.

If you close the Dashboards and then re-open them by selecting **Dashboards** in the Reporting navigation pane, the Home dashboard - as the default Dashboard - will re-display. (To select a different Dashboard as the default Dashboard for your current Controller sessions, see [Setting a Default Dashboard](#).)

You also can return directly to the Home dashboard - regardless of which Dashboard is the default Dashboard for this sessions - by clicking the Home icon that displays at the top right corner throughout the user interface.

## 4 Dashboard Details

- [Overview](#)
- [Accessing the Dashboards](#)
- [Dashboard Security](#)
- [Dashboard Tabs](#)
- [Setting Order of Dashboard Tabs](#)
- [Creating a Dashboard](#)
- [Editing a Dashboard](#)
- [Copying a Dashboard](#)
- [Renaming a Dashboard](#)
- [Deleting a Dashboard](#)
- [Setting a Default Dashboard](#)
- [Changing Dashboard Visibility](#)
- [Refreshing Dashboard Data](#)
- [Promoting a Dashboard](#)
- [Closing the Dashboards](#)

### 4.1 Overview

Dashboards are sets of [Widgets](#) that provide quick access to information about the Universal Controller activity and system information.

The Controller [Home Dashboard](#), which displays when you log in to the Controller, is a system-defined dashboard.

The Controller provides a set of Widgets, each of which you can add to any dashboard. You also can create your own Widgets and add them to any dashboard.

#### Note

You cannot add Widgets to or remove Widgets from the Home dashboard, and you cannot delete the Home dashboard, but you can copy it.

### 4.2 Accessing the Dashboards

To access the Dashboards, you can either:

- Click the Dashboards tab to display the currently selected dashboard.
- Click the [Home icon](#) at the top of any page to display your Home dashboard.
- Click **Dashboards** in the [Reporting](#) navigation pane to display your [default dashboard](#).

Unless you manually [close the dashboards](#), the dashboards remain open throughout your Controller session, and the Dashboards tab displays at the top of every page.

### 4.3 Dashboard Security

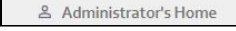


By default, all users can create, edit, and delete their own dashboards. To enforce stricter dashboard creation constraints at the user level, refer to the [Strict Dashboard Create Constraints](#) Universal Controller system property.

For authorization to create, edit, or delete a dashboard with Everyone or group visibility, refer to the [ops\\_report\\_admin](#), [ops\\_dashboard\\_group](#), and [ops\\_dashboard\\_global](#) roles.

### 4.4 Dashboard Tabs

Within the Dashboards tab, each dashboard that is visible to you, including your Home dashboard, will appear as a selectable tab along the bottom of the Dashboards page.

In order to distinguish dashboards that you have created from dashboards that you have inherited, you can select to display a visibility icon in the Dashboard tabs (see the [Use Dashboard Visibility Icons](#) user preference).

Visibility	Icon	Description
User		Dashboards visible to a specific user will be designated with an icon depicting one user.
Group		Dashboards visible to specific group(s) will be designated with an icon depicting two users.
Everyone		Dashboards visible to all users will be designated with an icon depicting three users.

### 4.5 Setting Order of Dashboard Tabs

A tab displays at the bottom of the Dashboards page for every dashboard that you create (or [copy](#).) By default, the Home dashboard tab displays first, followed by tabs in the order (by time) that their dashboards were created/copied.

You can change the order of the Dashboards tabs by clicking any tab and dragging it left or right.

The Dashboard tabs for any new dashboards created/copied since the last time that the tabs were re-ordered will display at the end of those re-ordered tabs, sorted by create time.

### 4.6 Creating a Dashboard

For dashboard create authorization, see [Dashboard Security](#).

To create a dashboard:

<b>Step 1</b>	Access the Dashboards page.
---------------	-----------------------------

<p><b>Step 2</b></p>	<p>From the <b>Customize</b> drop-down list at the bottom of the page, click <b>New</b>. The <b>New Dashboard</b> pop-up dialog displays.</p> <div data-bbox="475 304 1549 692" data-label="Image"> </div> <p>For dashboard Create authorization, see <a href="#">Dashboard Security</a>.</p>
<p><b>Step 3</b></p>	<p>Enter a Name for the new dashboard and a Visible To designation:</p> <ul style="list-style-type: none"> <li>• Me (Default)</li> <li>• Everyone</li> <li>• One or more <a href="#">groups</a>.</li> </ul> <div data-bbox="475 929 1541 1122" data-label="Text" style="border: 1px solid orange; padding: 10px;"> <p>With the <a href="#">ops_dashboard_global</a> role, you can additionally choose Everyone as a Visible To designation.</p> <p>With the <a href="#">ops_dashboard_group</a> role, you can additionally choose any group in which you are a member as a Visible To designation.</p> </div> <p>The Name must be unique within the selected Visible To designation.</p>
<p><b>Step 4</b></p>	<p>Click <b>OK</b>. An empty Dashboard page displays.</p> <p>To the left of the dashboard, a <b>Widget Picker</b> list of all <a href="#">Widgets</a> displays.</p> <div data-bbox="475 1317 1549 1861" data-label="Image"> </div>

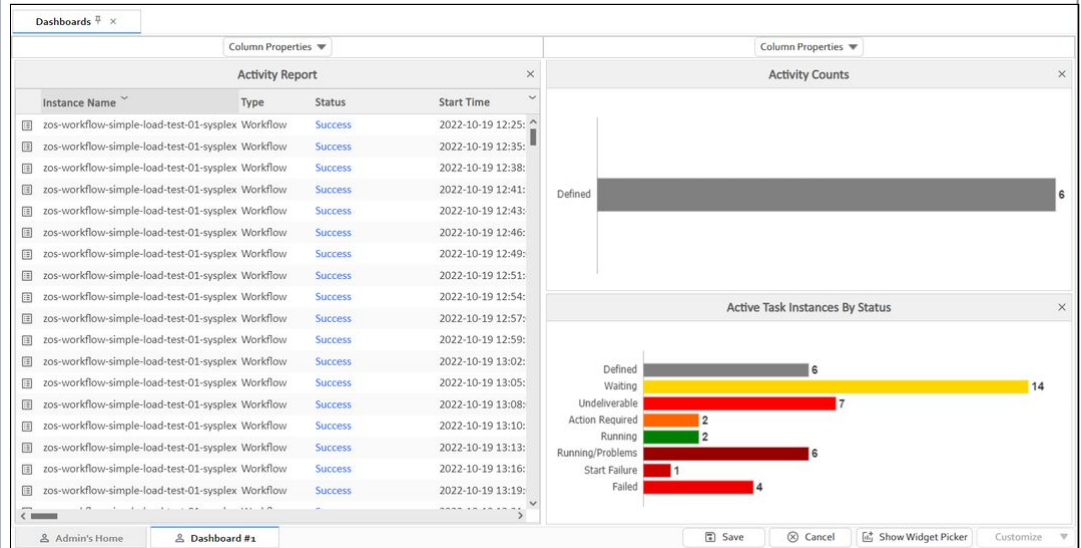
**Step 5**

By default, a new dashboard provides two columns, into which you can add any number of Widgets.

Drag and drop Widgets from the **Select a Widget...** list on the left side of the page into either column. The Widgets are arranged vertically in that column.

To see what the dashboard will look like without the **Widget Picker**, click the **Hide Widget Picker** button at the bottom of the dashboard. The **Hide Widget Picker** button is replaced by a **Show Widget Picker** button, which you can click to re-display the **Widget Picker**.

For example:

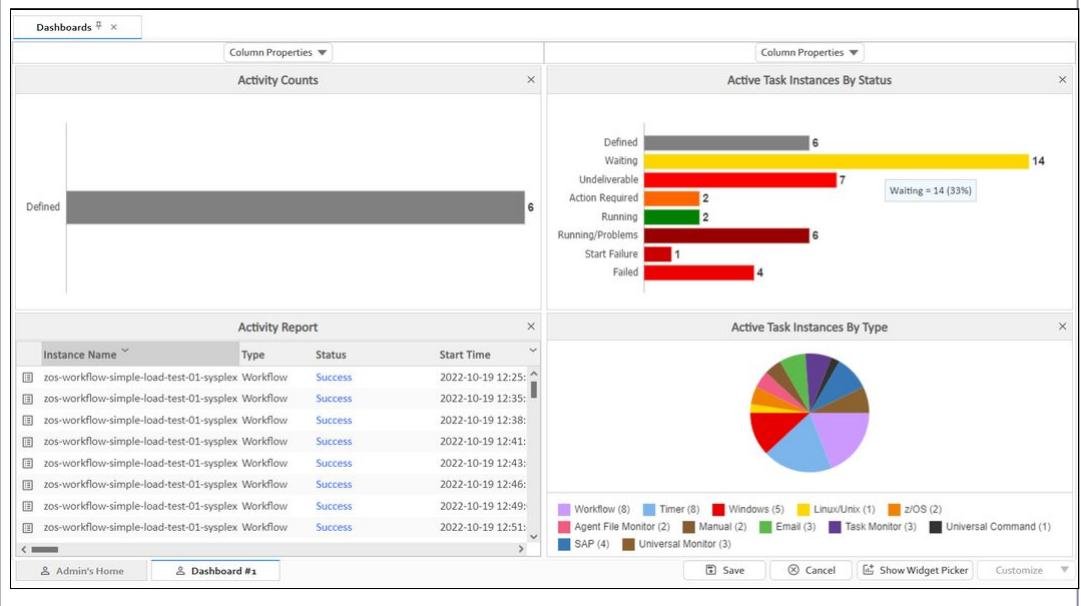


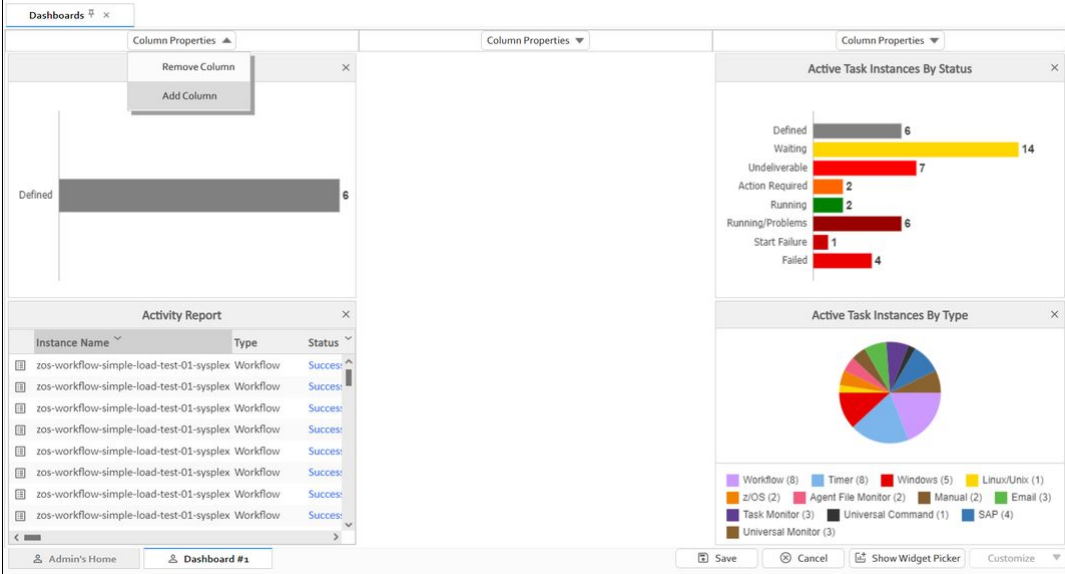
**Step 6**

To display a call-out of current data for any section of a Widget, hover your cursor over that section. The call-out identifies:

- Data type represented by that section of the Widget
- Number of that data type in that section
- Percent of that data type in that section (in comparison to all sections)

For **Composite Widgets**, the call-out identifies the statuses included in each of its Activity Widgets.



<p><b>Step 7</b></p>	<p>If you want to arrange your Widgets into more columns, click the <b>Column Properties</b> drop-down list above any column and then click <b>Add Column</b>.</p>  <p>After you have dropped a Widget into a column, you can drag and drop it to another location in the column or to another column.</p> <p>You also can drag and drop each column into a new location by clicking the column header.</p>
<p><b>Step 8</b></p>	<p>If you decide that you do not want a selected Widget in the dashboard, click the <b>x</b> icon in the top right corner of the Widget to remove it.</p>
<p><b>Step 9</b></p>	<p>If you want to add some space between Widgets in a column, drag and drop the <b>Spacer</b> Widget from the list.</p>
<p><b>Step 10</b></p>	<p>Click the <b>Save</b> button to save the dashboard and display it on the Dashboards page. A tab for that dashboard also displays at the bottom of the Dashboards page.</p> <p>(See <a href="#">Setting Order of Dashboard Tabs</a>, below.)</p>

## 4.7 Editing a Dashboard

**Note**

You cannot edit the [Home Dashboard](#).

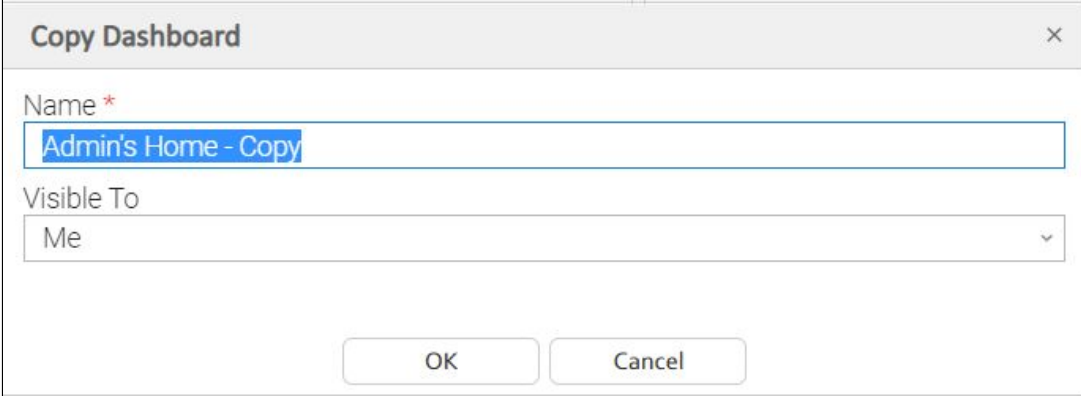
To edit a dashboard:

<p><b>Step 1</b></p>	<p>Access the Dashboards page.</p>
<p><b>Step 2</b></p>	<p>At the bottom of the page, click the tab for the dashboard that you want to edit. That dashboard then displays.</p>

<b>Step 3</b>	<p>From the <b>Customize</b> drop-down list in the bottom right corner of the page, click <b>Edit</b>. The <b>Column Properties</b> header displays above each column of Widgets.</p> <p>To display the <b>Widget Picker</b> list of Widgets that you can add to the dashboard, click the <b>Show Widget Picker</b> button at the bottom of the page.</p> <p>For dashboard Edit authorization, see <a href="#">Dashboard Security</a>.</p>
<b>Step 4</b>	<p>Add, relocate, or remove any columns and/or Widgets from the dashboard (see <a href="#">Creating a Dashboard</a> for details.)</p> <p>If you remove a column from a Dashboard, all Widgets in that column also are removed; they are not relocated to another column.</p>
<b>Step 5</b>	Click the <b>Save</b> button.

## 4.8 Copying a Dashboard

To copy a dashboard and automatically create a tab for that Dashboard in Dashboards:

<b>Step 1</b>	Access the Dashboards page.
<b>Step 2</b>	Display the dashboard that you want to copy.
<b>Step 3</b>	<p>From the <b>Customize</b> drop-down list at the bottom right corner of the dashboard, click <b>Copy</b>. The <b>Copy Dashboard</b> pop-up dialog displays.</p>  <p>For dashboard Copy authorization, see <a href="#">Dashboard Security</a>.</p>
<b>Step 4</b>	<p>Enter a Name for the copy of the dashboard and a Visible To designation (default is Me).</p> <ul style="list-style-type: none"> <li>• With the <a href="#">ops_dashboard_global</a> role, you can additionally choose Everyone as a Visible To designation.</li> <li>• With the <a href="#">ops_dashboard_group</a> role, you can additionally choose any group in which you are a member as a Visible To designation.</li> </ul> <p>The Name must be unique within the selected Visible To designation.</p>
<b>Step 5</b>	Click <b>OK</b> . The copy of the dashboard displays, and a tab for that copied dashboard displays at the bottom of the page.

## 4.9 Renaming a Dashboard

To rename a dashboard:

<b>Step 1</b>	Access the Dashboards page.
<b>Step 2</b>	Display the dashboard that you want to rename.
<b>Step 3</b>	From the <b>Customize</b> drop-down list in the bottom right corner of the page, click <b>Edit</b> . For dashboard Edit authorization, see <a href="#">Dashboard Security</a> .
<b>Step 4</b>	Double-click the name of the dashboard in the tab along the bottom of the Dashboards page to highlight the name.
<b>Step 5</b>	Enter a new name for the dashboard and click <b>Save</b> .

## 4.10 Deleting a Dashboard

### Note

You cannot delete the [Home Dashboard](#).

To delete a dashboard:

<b>Step 1</b>	Access the Dashboards page.
<b>Step 2</b>	Display the dashboard that you want to delete.
<b>Step 3</b>	From the <b>Customize</b> drop-down list at the bottom right corner of the dashboard, click <b>Delete</b> . For dashboard Delete authorization, see <a href="#">Dashboard Security</a> .
<b>Step 4</b>	On the confirmation pop-up that displays, click <b>Yes</b> . The dashboard is deleted.

## 4.11 Setting a Default Dashboard

By default, the Home dashboard displays when you log in, click the Home icon, or open Dashboards via the **Reporting** navigation pane.

You can set a different dashboard to display by default when Dashboards is opened via the **Reporting** navigation pane.

Additionally, you can select this default dashboard to display when you log in or click the Home icon (see the [Use Default Dashboard For Home](#) user preference).

You can select any dashboard that is visible to you as your default Dashboard.

To set a Dashboard other than the Home dashboard as the default Dashboard:

<b>Step 1</b>	Access the Dashboards page.
<b>Step 2</b>	Display the dashboard that you want to set as the default.

<b>Step 3</b>	From the <b>Customize</b> drop-down list at the bottom right corner of the dashboard, click <b>Set As Default</b> .
---------------	---

## 4.12 Changing Dashboard Visibility


You can change the visibility of a dashboard so that it is visible to yourself, any combination of [groups](#), or everyone.

You also can select whether or not to make a dashboard visible by default, as well as to override your default visibility selection by selecting to show or hide it.

**Note**

You cannot change the visibility of the [Home Dashboard](#).

<b>Step 1</b>	Access the Dashboards page.								
<b>Step 2</b>	<p>From the <b>Customize</b> drop-down list at the bottom right corner of the dashboard, click <b>Visibility....</b> The Dashboard Visibility pop-up dialog displays a list of all dashboards that are available to you, in tab order, followed by hidden dashboards.</p> <p>Your default dashboard is <u>underlined</u> and <i>italicized</i>.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p style="text-align: right; margin: 0;"><b>Dashboard Visibility</b> <span style="float: right;">×</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> <th style="text-align: left;">Visible To</th> <th style="text-align: left;">Visible By Default</th> <th style="text-align: left;">Show/Hide</th> </tr> </thead> <tbody> <tr> <td><u><i>Admin's Home</i></u></td> <td>Me</td> <td></td> <td>Show</td> </tr> </tbody> </table> <p style="margin-top: 20px;">Reset Visibility <input type="checkbox"/></p> <p style="text-align: right; margin-top: 10px;"> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> </p> </div>	Name	Visible To	Visible By Default	Show/Hide	<u><i>Admin's Home</i></u>	Me		Show
Name	Visible To	Visible By Default	Show/Hide						
<u><i>Admin's Home</i></u>	Me		Show						
<b>Step 3</b>	To change the visibility of a dashboard, double-click the <a href="#">Visible To</a> column for that dashboard and select Me, Everyone, or any Group of which you are a member.								
<b>Step 4</b>	To select whether or not a dashboard is visible by default, double-click the <a href="#">Visible By Default</a> column for that dashboard and select Yes or No.								
<b>Step 5</b>	To specify <a href="#">show/hide</a> settings for a dashboard, double-click the Show/Hide column for that dashboard and select Show or Hide.								

<p><b>Step 6</b></p>	<p>Check <b>Reset Visibility</b> if you want to reset your show/hide customizations, default dashboard, and tab order. You will be prompted with the following confirmation when you submit your changes:</p> <div data-bbox="432 315 1544 577" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Confirm</b> <span style="float: right;">×</span></p> <p> <i>Reset Visibility will clear your Show/Hide customization, your default dashboard, and your tab order.</i></p> <p>Continue?</p> <p style="text-align: center;"> <input type="button" value="Reset Visibility"/> <input type="button" value="Cancel"/> </p> </div>
<p><b>Step 7</b></p>	<p>Click <b>Submit</b> to submit your visibility changes.</p>

### 4.12.1 Visible To

The Visible To column specifies the current visibility of the dashboard.

- To edit the Visible To of a dashboard currently assigned to Everyone, you must have the [ops\\_dashboard\\_global](#) role.
- To edit the Visible To of a dashboard currently assigned to a group you are a member of, you must have the [ops\\_dashboard\\_group](#) role.
- If you are permitted to edit the Visible To of a dashboard, when you click the Visible To cell, a drop-down list displays with the following options.
  - Me
  - Everyone (if you have the [ops\\_dashboard\\_global](#) role).
  - Each group you are a member of (if you have the [ops\\_dashboard\\_group](#) role).
  - Each group the dashboard is currently visible to, even if you are not a member yourself.

#### Note

If you unselect a group that you are not a member of from the Visible To column, and submit the change, you will not be able to add that group back. You can only select and unselect visibility for groups that you are a member of.

You cannot modify the Visible To designation for your home dashboard.

### 4.12.2 Visible By Default

The Visible By Default column specifies if the dashboard should display automatically for a user who inherits it.

- To edit the Visible By Default of a dashboard currently assigned to Everyone, you must have the [ops\\_dashboard\\_global](#) role.
- To edit the Visible By Default of a dashboard currently assigned to a group you are a member of, you require the [ops\\_dashboard\\_group](#) role.
- If you are permitted to edit the Visible By Default of a dashboard, when you click the Visible By Default cell, a drop-down list displays with Yes and No options (Yes is the default).

### 4.12.3 Show/Hide

The Show/Hide column specifies the user's show/hide customizations.

- You can edit the show/hide customization for any available dashboard except the your home dashboard, which will always display as Show.

#### Note

While modifying the [Visible To](#) and [Visible By Default](#) options requires dashboard update permission, modifying the show/hide customization does not, as the show/hide customization data is owned by the user.

- For any dashboard with Me visibility, clicking the Show/Hide column displays a drop-down list with Show and Hide options (Show is the default).
- For any dashboard with group visibility or Everyone visibility, clicking the Show/Hide column displays a drop-down list with Show, Hide and blank options (blank is the default).
  - Show indicates the dashboard should be shown regardless of the Visible By Default configuration.
  - Hide indicates the dashboard should be hidden regardless of the Visible By Default configuration.
  - Blank indicates the dashboard should be displayed based on the Visible By Default configuration. If the dashboard is the your default dashboard, the blank option is not available, and the Show/Hide value will default to Show.
- If the dashboard is the your default dashboard, changing the Show/Hide value from Show to Hide will clear the default dashboard designation.

## 4.13 Refreshing Dashboard Data

### 4.13.1 Automatic Refresh

All Widget records specify a refresh rate for when the dynamic data in the Widget is automatically refreshed.

#### Note

You also can set up an automatic refresh of all Widgets in a dashboard when the Dashboard is re-focused (that is, the user tabs back to the dashboard) via the [Dashboard Force Refresh On Focus](#) and [Dashboard Force Refresh On Focus Threshold](#) user preferences.

### 4.13.2 Manual Refresh

You can manually refresh Widget data either of two ways:

- To manually refresh the data on all Widgets in a dashboard, click the Refresh button in the bottom right corner of the dashboard.

- To manually refresh the data for a single Widget, click the Refresh icon in the top right corner of the Widget.

## 4.14 Promoting a Dashboard

You can perform a [Bundleless Promotion](#) of a Dashboard by accessing the Customize drop-down list at the bottom right corner of the dashboard and clicking **Promote...**

If Follow References = false for a promotion, any widget required by a promoted dashboard must already be available on the target system.

For details on how the Controller resolves dashboards that references widgets, see [Preparing Bundles for Promotion / Widgets](#).

## 4.15 Closing the Dashboards

You can close the Dashboards at any time by clicking the **x** icon on the Dashboards tab.

To re-open the Dashboards, you can either:

- Click the [Home icon](#) at the top of any page to display your Home dashboard.
- Click **Dashboards** in the Reporting navigation pane to display your [default Dashboard](#).