



Aras Innovator 30

Dashboards User Guide

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Table of Contents

Send Us Your Comments	4
1 Introduction	5
1.1 Purpose	5
1.2 Scope	5
1.3 Target Audience	5
2 Aras Dashboards Introduction	5
2.1 Aras Dashboards Overview	5
2.2 Dashboard Permissions	5
2.2.1 <i>Dashboard Authors</i>	5
2.2.2 <i>Dashboard Administrators</i>	6
2.2.3 <i>Dashboard Viewers</i>	6
2.3 Sharing Dashboards using Private Permissions	6
2.4 View Dashboard	6
2.5 Create New Dashboard	8
2.6 Edit Dashboard	9
2.7 Delete Dashboard	9
2.8 Interactive Widgets	10
2.8.1 <i>Interactive Widget Templates</i>	10
2.8.2 <i>Interactive Widget Types</i>	10
2.8.3 <i>Add Interactive Widgets</i>	11
2.8.4 <i>Widget Settings</i>	13
2.8.5 <i>Delete Interactive Widget</i>	14
2.8.6 <i>Create New Widget Template</i>	14

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1 Introduction

1.1 Purpose

This User Guide describes how to use **Dashboards** within Aras Innovator to provide configurable views that can be populated with **Interactive Widgets** for displaying and navigating data.

1.2 Scope

This document provides instructions to create and manage **Dashboards** configure **Widgets** on the Aras Innovator platform.

1.3 Target Audience

This document is intended for Aras Innovator users responsible for analyzing and navigating the data populated on the **Dashboards**.

2 Aras Dashboards Introduction

2.1 Aras Dashboards Overview

Aras Dashboards contain Interactive Widgets to monitor and analyze data within Aras Innovator. Users can customize the widgets to adjust visual settings. Users can configure **Dashboard Settings**, **View Dashboard** content, and edit **Widget Settings** from a **Dashboard Item**.

2.2 Dashboard Permissions

Dashboard permissions allow Users to access, view, and modify Dashboard content. The default permissions for Aras Dashboards include three group identities, such as **Dashboard Authors**, **Dashboard Administrators**, and **Dashboard Viewers**.

Name	Get	Update	Delete	Can Discover	Show Perm...	Can change access
Dashboard Authors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dashboard Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Dashboard Viewers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2.2.1 Dashboard Authors

Dashboard Authors can view and create Dashboards. However, **Dashboard Authors** can only edit, change permissions and delete Dashboards they create. **Dashboard Authors** can only view widget templates. **Dashboard Administrators** can create and edit **Widget Templates**.

2.2.2 Dashboard Administrators

Dashboard Administrators can configure all Dashboard Features, as well as create, edit, and delete Dashboards and Interactive Widgets. **Dashboard User** permissions are managed by **Dashboard Administrators**.

2.2.3 Dashboard Viewers

Dashboard Viewers can only view Dashboards.

Note: Users without these three identities do not have access to Dashboards, unless the permissions are customized, or a specific Dashboard has a private permission that overrides the default permission model.

2.3 Sharing Dashboards using Private Permissions

A Private Permission is a Permission set specifically for a given Item, overriding its current Item Permission. The configured Permission is unique to the given Item and is not shared with any other Items. Private Permissions can be set for confidential Items to prevent viewing by other Identities. Once set, the Private Permission controls access to the Item by imposing a new set of access rights.

It is possible to roll back to the default Item Permission. Once the default permission is reapplied, the Private Permission is deleted.

The Can Change Access grant in an Item Permission defines who can create Private Permissions. By default, the Item Creator and Assigned Creator have this grant. Aras Administrators can define who can change access rights for Items.

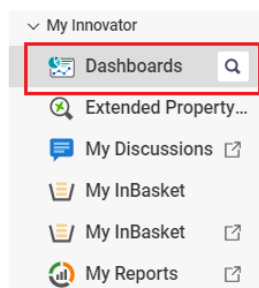
Note: For detailed instructions refer to Aras Innovator Product Engineering User's Guide Section 3.3

Dashboards Creators and Administrators are granted Change Access right and can assign and control access rights of the created Dashboards.

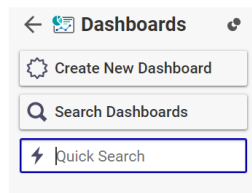
2.4 View Dashboard

The following steps outline the process of accessing Dashboards:

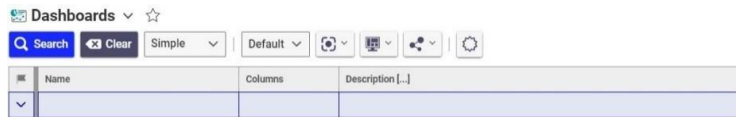
1. From the **Table of Contents**, expand **My Innovator** and select **Dashboards**.



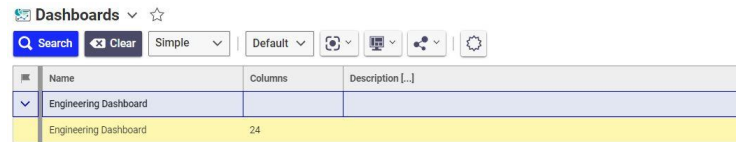
The **Dashboard Table of Contents** appears.



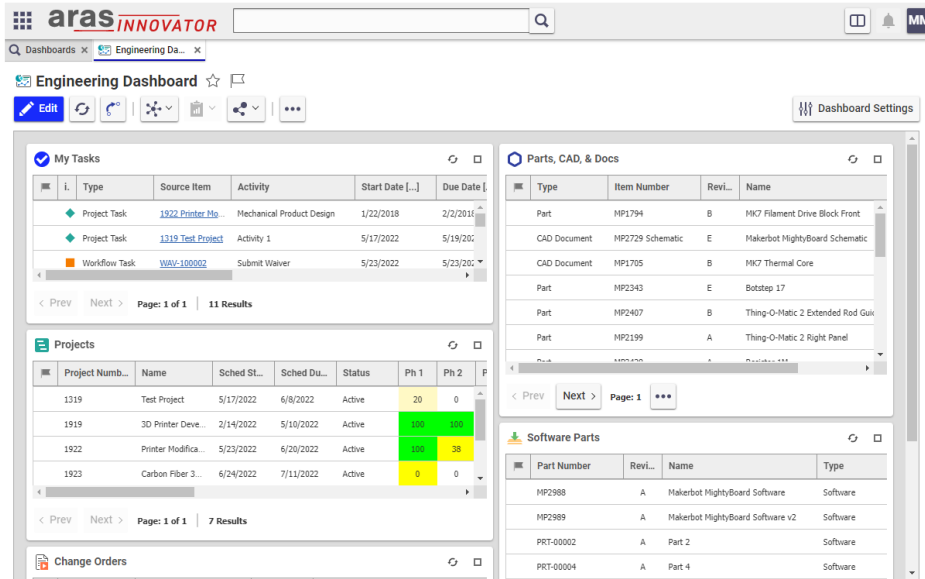
2. Click **Search Dashboards**. The **Dashboards** grid appears.



3. Enter the **Name** of the **Dashboard** and click **Search**. The **Dashboard** appears in a new row.



4. Double-click the **Dashboard**. The **Dashboard** form appears.

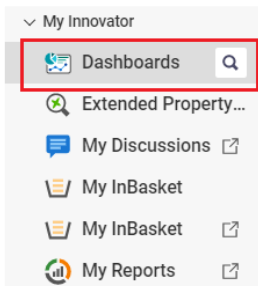


5. Scroll through the **Dashboard** to view all the **Interactive Widgets**.
6. If needed, click the **Maximize** icon to expand an **Interactive Widget** block.

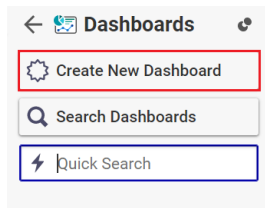
2.5 Create New Dashboard

The following steps outline the process of creating a new **Dashboard**:

1. From the **Table of Contents**, expand **My Innovator** and select **Dashboards**.



2. The **Dashboard Table of Contents** appears. Click **Create New Dashboard**.



The **Dashboard** form appears.

3. Enter the **Name** and **Description** of the new **Dashboard**. The **Columns** field value is 24 by default. Do not change the value of the **Columns** field.
4. Click **Done** to save the new **Dashboard**.

2.6 Edit Dashboard

The following steps outline the process to edit a **Dashboard**:

1. Open a **Dashboard**.
2. Click **Edit**.
3. Click **Dashboard Settings** to edit the **Name** and **Description** of the **Dashboard**.

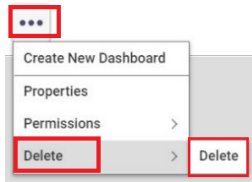
4. Click **Done** to save the changes.

2.7 Delete Dashboard

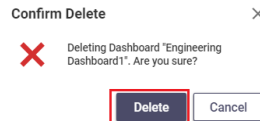
The following steps outline the process to delete a **Dashboard**:

1. Open a **Dashboard**.
2. Click **Edit**.
3. Click **More** and expand **Delete**.

4. Click **Delete**.



5. The **Confirm Delete** dialog box appears.



6. Click **Delete**.

2.8 Interactive Widgets

2.8.1 Interactive Widget Templates

An **Interactive Widget Template** provides details such as widget name, label, type, and icon. The **Widget Templates** define the properties that control a widget's content and behavior. A **Dashboard User** can enter these properties manually or a **Dashboard Administrator** can predefine them.

2.8.2 Interactive Widget Types

Interactive Widget Types determine the appearance and functionality of an **Interactive Widget**. The following three **Widget Types** which can be used are:

- **Grid Widget Type:** The Grid Widget displays search results within Aras Innovator. It is used to display data from the ItemType with related Items.

Project Nu...	Name	Sched St...	Sched Du...	Status	Ph 1	Ph 2	Ph 3
1919	3D Printer Devel...	10/2/2017	12/28/2017	Active	100	100	100
1922	Printer Modificati...	1/9/2018	4/2/2018	Active	100	38	0
1923	Carbon Fiber 3D ...	2/12/2018	5/4/2018	Active	0	0	0
1925	Metal Sintering 3...	3/1/2018	6/13/2018	Active	0	0	0
1926	Educational 3D P...	3/5/2018	1/16/2019	Active	0	0	0
1927	Emerging Materi...	3/5/2018	1/16/2019	Pending	0	0	0

< Prev Next > Page: 1 of 1 6 Results

- **Tree Grid Widget Type:** The Tree Grid View Widget displays existing **Tree Grid Views** associated with the **Query Definition** within Aras Innovator such as BOM Structures, CAD Structures, and Project Lists.

TGV of Part Costings

Item Name	Cost
MP0101	
MP2942	
MP2667	
MP2667	0.0600
MP2322	
MP2322	3.8000
MP2660	
MP2660	0.6500
MP2939	
MP2347	
MP2347	9.0000
MP2685	
MP2685	0.4500

- **Report Widget Type:** Report widgets are used to display existing reports within Aras Innovator.

PR Log Report

Generated on: 1/2/2023, 1:48:16 PM

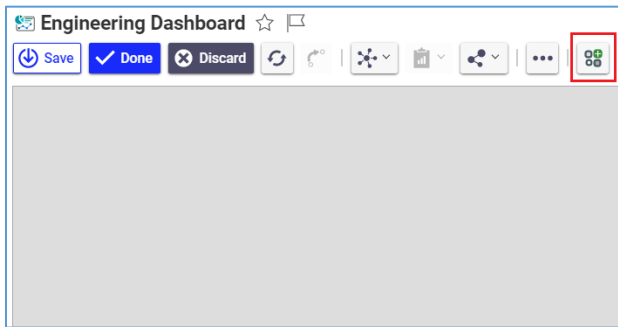
PR Number	Title	Priority	Date Reported	Reported By	Assigned Creator	Status	ECR
PR-100001	SD Card fit issues		1/19/2018 10:30:00 AM	Diane Prescott		In Verification	
PR-100002	Cable routing within case		11/13/2017 6:40:00 PM	Dan Park		In Verification	
PR-100003	Screw pre-stress can break boards		11/13/2017 6:40:00 PM	Dan Park		In Verification	
PR-100004	Manufacturing issues relating to case tolerance		11/13/2017 6:40:00 PM	Dan Park		In Verification	
PR-100005	Packaging not providing sufficient protection		11/15/2017 11:00:00 AM	Dan Park		Pending	
PR-100006	Customer request for a see-thru cover to contain sound and smell		11/27/2017 6:30:00 PM	Manish Chopra		In Verification	
PR-100007	Extruder head overheating		1/22/2018 2:44:00 PM	Diane Prescott		In Verification	
PR-100008	Sourcing problems		1/22/2018 3:00:00 PM	Nancy Anderson		Pending	

2.8.3 Add Interactive Widgets

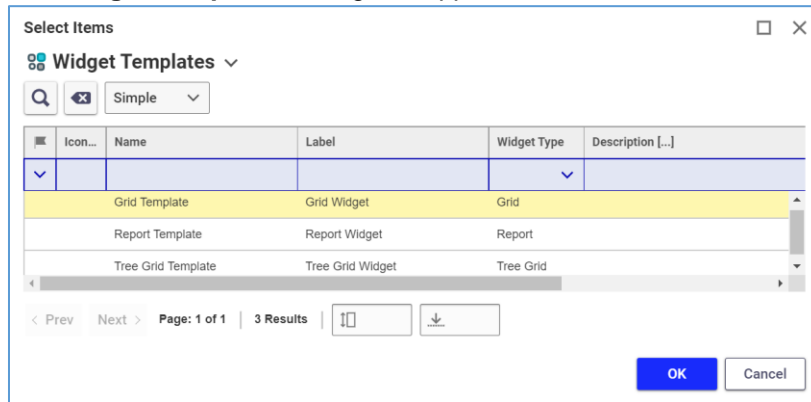
The following steps outline the process of adding Interactive Widgets to the **Dashboards**:

1. Open a **Dashboard**.
2. Click **Edit**.

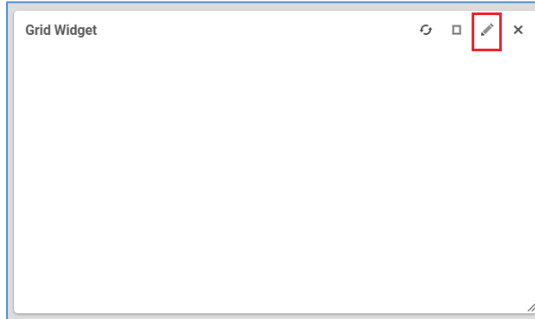
3. Click **Add Widget**.



The **Widget Templates** dialog box appears.



4. Select a **Widget Template** and click **OK**. The Widget form appears.



5. Click **Edit** to configure the **Widget Settings** which populates data on the **Interactive Widget**.
6. Click **Done** to save the **Widget Settings**.

2.8.4 Widget Settings

Widget Settings allow user to customize the functionality of the **Interactive Widget**. Users can specify which content should appear in the **Interactive Widget** within the **Widget Settings**.

2.8.4.1 Grid Widget Settings

Enter the following information to populate a **Grid Widget** on the **Dashboard**:

Field	Description
Label	Widget Name. This is an optional field.
Icon	Widget Icon. This is an optional field.
Width & Height	Width and Height of the Widget. This is an optional field.
ItemType	Widget ItemType. This is a required field.
Search	Widget Favorite Search. This is an optional field.
Results per Page	Number of rows to be displayed per page in the grid. This is an optional field.
Maximum Results	Maximum number of items to be populate the widget grid (across all pages). This is an optional field.
Search Criteria	

NOTE: The fields shown may vary depending on the configuration.

2.8.4.2 Report Widget Settings

Enter the following information to populate a **Report Widget** on the **Dashboard**:

Field	Description
Label	Widget Name. This is an optional field.
Icon	Widget Icon. This is an optional field.
Width & Height	Width and Height of the Widget. This is an optional field.
Report	Display Widget Report. This is a required field.
ItemType	Widget ItemType. This is a required field.

NOTE: The fields shown may vary depending on the configuration.

2.8.4.3 Tree Grid Widget Settings

Enter the following information to populate a **Tree Grid Widget** on the **Dashboard**:

Field	Description
Label	Widget Name. This is an optional field.
Icon	Widget Icon. This is an optional field.
Width & Height	Width and Height of the Widget. This is an optional field.
Tree Grid View	Display Tree Grid View Definition. This is a required field.
Context Item	Root item of the Tree Grid View. This is a required field.

NOTE: The fields shown may vary depending on the configuration.

2.8.5 Delete Interactive Widget

The following steps outline the process to delete an **Interactive Widget**:

1. Open a **Dashboard**.
2. Click **Edit**.
3. Select the Widget and click **Delete**.

Project Nu...	Name	Sched St...	Sched Du...	Status	Ph 1
1919	3D Printer Devel...	10/2/2017	12/28/2017	Active	100
1922	Printer Modificati...	1/9/2018	4/2/2018	Active	100
1923	Carbon Fiber 3D ...	2/12/2018	5/4/2018	Active	0
1925	Metal Sintering 3...	3/1/2018	6/13/2018	Active	0

The **Delete Widget** dialog box appears.

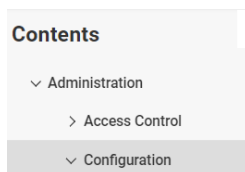


4. Click **Delete**.
5. Click **Done** to save the changes.

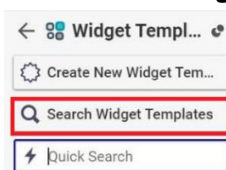
2.8.6 Create New Widget Template

The following steps outline the process of creating a new **Widgets Template** using pre-existing **Widget Templates**:

1. From the **Table of Contents**, expand **Administration** and **Configuration**.



2. Select **Widget Template**. The **Widget Template Table of Contents** appears.
3. Click **Search Widget Templates**.



- Click **Search**. A list of **Widget Templates** appears.

Widget Templates ▼ ☆

🔍 Search
🗑️ Clear
Simple ▼
Default ▼
🔄
📄
👤
⚙️

Icon...	Name	Label	Widget Type	Description [...]
▼			▼	
	Grid Template	Grid Widget	Grid	
	Report Template	Report Widget	Report	
	Tree Grid Template	Tree Grid Widget	Tree Grid	

- Right-click an existing **Widget Template** and select **More** and **Save As**.

Widget Templates ▼ ☆

🔍 Search
🗑️ Clear
Simple ▼
Default ▼
🔄
📄
👤
⚙️

Icon...	Name	Label	Widget Type	Description [...]
▼			▼	
	Grid Template	Grid Widget	Grid	
	Report Template	Report Widget	Report	
	Tree Grid Template	Tree Grid Widget	Tree Grid	

- 🔗 Open
- ☆ Favorite
- 🗑️ Claim
- 👤 Promote
- 📄 Navigate >
- 📄 Reports >
- 👤 Share >
- ⋮ More > Properties
- 👤 Admin > Save As
- 🗑️ Delete

A copy of the selected **Widget Template** is created.

Copy (2) of Grid Template ☆ 📄

🔍 Edit
🔄
📄
👤
⋮

Name: Copy (2) of Grid Template Label: Grid Widget Icon:

Widget Type: Grid

Description:

Properties

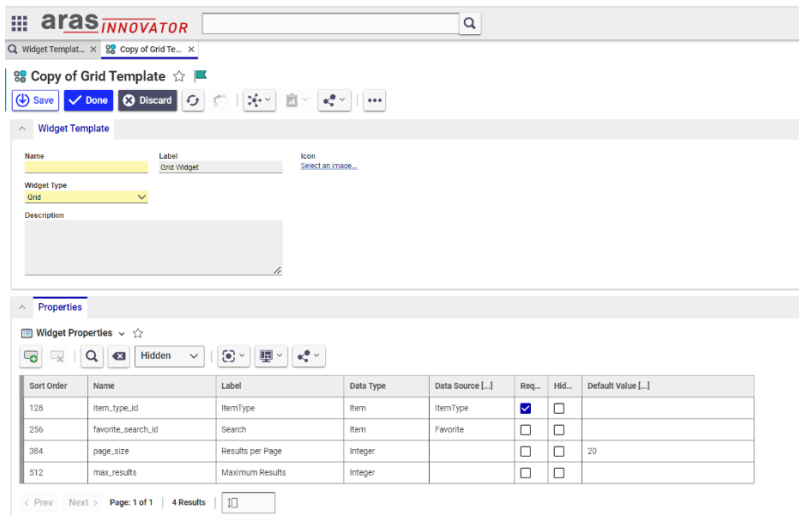
Widget Properties ▼ ☆

🔍
🗑️ Hidden ▼
🔄
📄
👤
⋮

Sort Order	Name	Label	Data Type	Data Source [...]	Req.	Hid.	Default Value [...]
128	item_type_id	ItemType	Item	ItemType	<input checked="" type="checkbox"/>	<input type="checkbox"/>	88673D2BDA154299ADF28DF172721FFD
256	favorite_search_id	Search	Item	Favorite	<input type="checkbox"/>	<input type="checkbox"/>	
384	page_size	Results per Page	Integer		<input type="checkbox"/>	<input type="checkbox"/>	20
512	max_results	Maximum Results	Integer		<input type="checkbox"/>	<input type="checkbox"/>	

< Prev Next > Page: 1 of 1 4 Results 📄

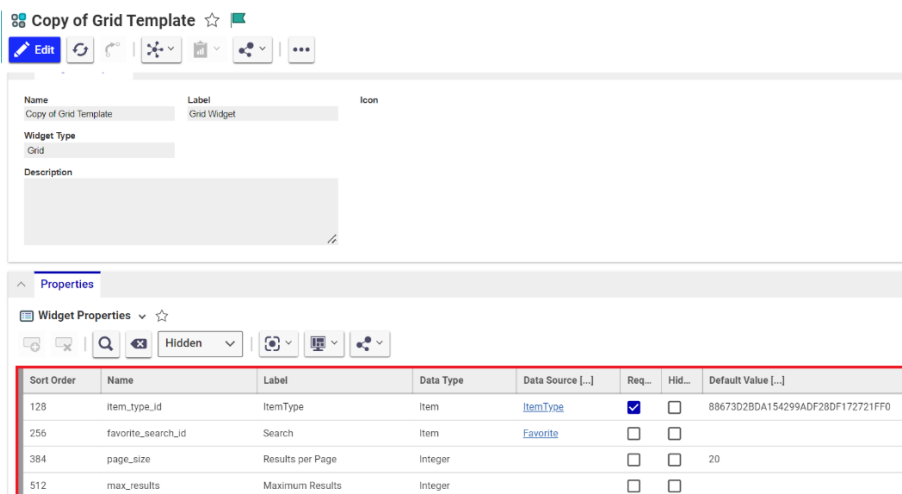
6. Click **Edit**.



7. Enter the following information in the **Widget Template** form:

Field	Description
Name	Widget Template Name. This is a required field.
Label	Widget Name. This is an optional field.
Icon	Widget Template Icon. This is an optional field.
Widget Type	Type of a Widget. This is a required field.
Description	Widget Template Description. This is an optional field.

8. **Widget Properties** are populated based on the selected **Widget Template**. Users can add additional **Widget Properties**.



NOTE: All the **Widget Properties** defined here are displayed on the **Widget Settings** page on the **Dashboard**. User can choose to display/hide specific fields and select the **Required** fields.

9. Click **Done** to save the changes.

The newly added **Widget Template** is displayed on the **Widget Templates** page.