



Aras Innovator 34

Dashboards User Guide

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Aras Corporation
100 Brickstone Square
Suite 100
Andover, MA 01810
Phone: 978-691-8900

E-mail: support@aras.com

Website: <https://www.aras.com/>

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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

Sharing Dashboards with Identities using the Roles feature empowers Dashboard creators to manage access and collaboration by assigning specific roles to selected identities. This ensures controlled access and that the right audience receives the intended insights.

Key highlights:

- **Granular Access Control:** Creators can assign roles (EDITOR or VIEWER) to specific identities, tailoring permissions based on the needs of each user.
 - **EDITOR:** Full access to update, modify, and share the Dashboard, without changing the original creator's ownership.
 - **VIEWER:** View-only access to execute and analyze the Dashboard, without the ability to modify.
- **Flexible Role Management:**
 - Easy UI to select identities, assign roles, and review the sharing list with assigned permissions.
 - Built-in relationships for managing shared identities through "Dashboard IdentityShare," enabling seamless tracking and management.
- **Automated Team Creation:** When sharing begins, two internal roles are automatically generated:
 - Dashboard Full Access Sharing for editors.
 - Report Read Only Sharing for viewers.

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.

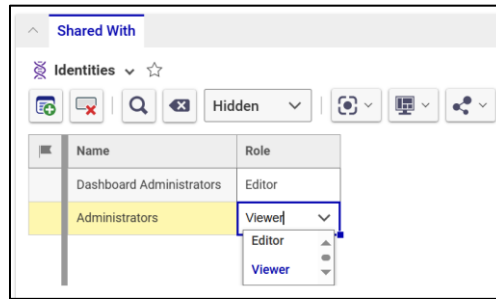
2.3 Sharing Dashboards using Role based permissions

The Sharing Dashboards with Identities using Roles feature empowers Dashboard creators to manage access and collaboration by assigning specific roles to selected identities. This ensures controlled access and that the right audience receives the intended insights.

A Dashboard can be shared to specific identities providing two different roles:

- **Editor:** correspond to the Full Access Sharing. By assigning this role the identities will be able to update, change sharing and delete the Dashboard.
- **Viewer:** corresponding to the Read Only Sharing By assigning this role the identities will be only able to discover and open Dashboard in View mode only.

Easy UI to select identities, assign roles, and review the sharing list with assigned permissions.



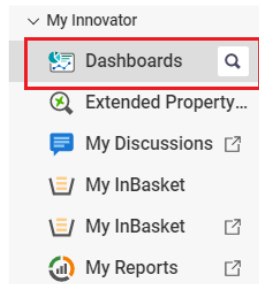
In case an identity is assigned to multiple roles as part of different identities sets it will get the higher role rights.

Note: Dashboard Sharing uses Aras Innovator Team permissions. Teams are created and deleted when sharing is configured or updated. These system Teams must not be edited or deleted manually.

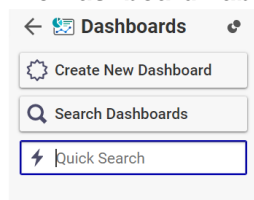
2.4 View Dashboard

The following steps outline the process of accessing Dashboards:

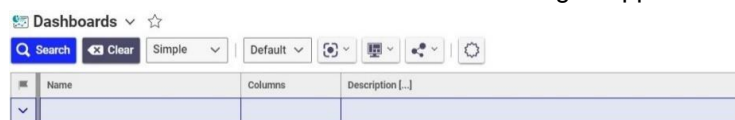
1. From the **Table of Contents**, expand **My Innovator** and select **Dashboards**.



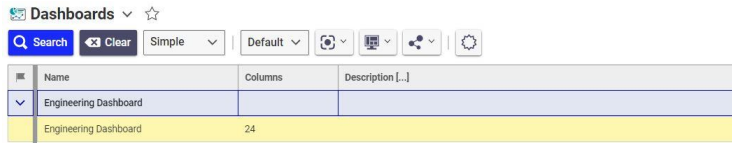
The **Dashboard Table of Contents** appears.



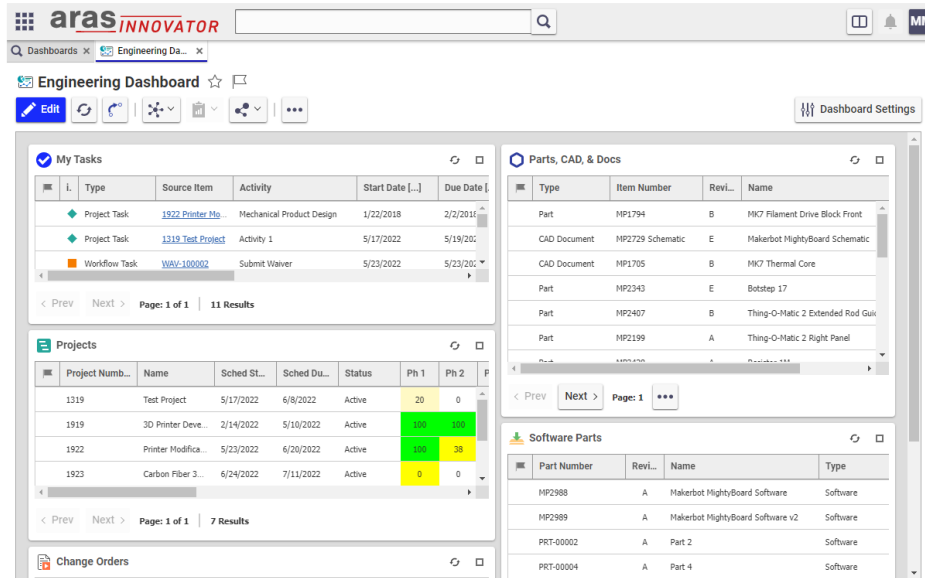
2. Click **Search Dashboards**. The **Dashboards** grid appears.



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.

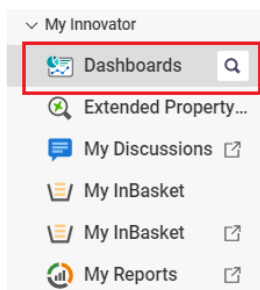


5. Scroll through the **Dashboard** to view all the **Interactive Widgets**.
6. If needed, click the **Maximize** icon to expand an **Interactive Widget** block.

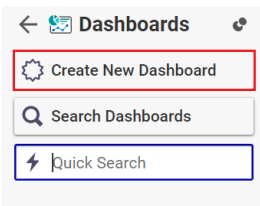
2.5 Create New Dashboard

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**.

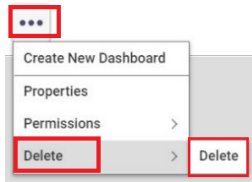
4. Click **Done** to save the changes.

2.7 Delete Dashboard

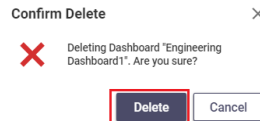
The following steps outline the process to delete a **Dashboard**:

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

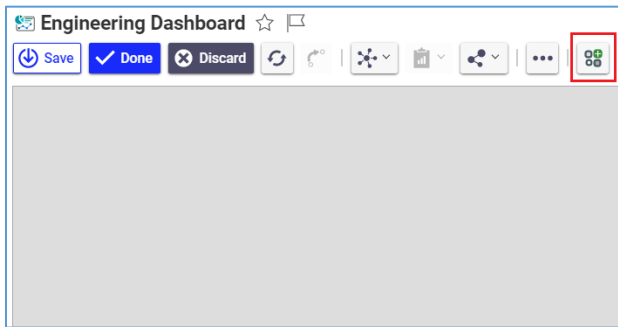
PR Number	Title	Priority	Date Reported	Reported By	Assigned Creator	Status	ECR
PR-100001	SD Card fit issues		1/19/2018 10:30:00 AM	Diane Prescott		In Verification	
PR-100002	Cable routing within case		11/13/2017 6:40:00 PM	Dan Park		In Verification	
PR-100003	Screw pre-stress can break boards		11/13/2017 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

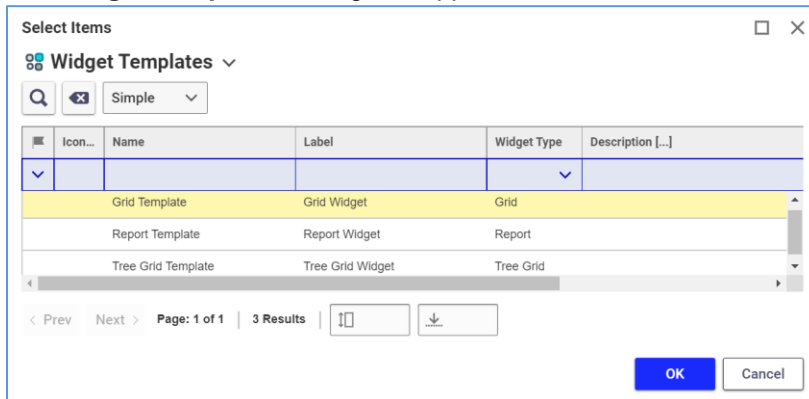
The following steps outline the process of adding Interactive Widgets to the **Dashboards**:

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

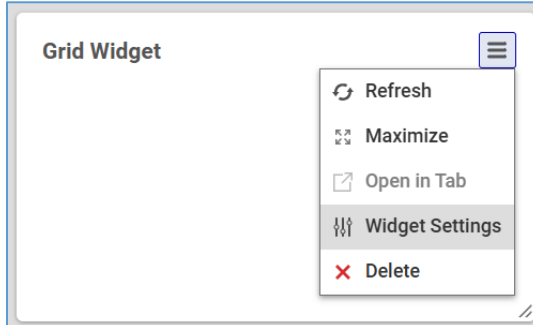
3. Click **Add Widget**.



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. Enable dynamic context selection. Allow the widget's content to be updated from other widgets in the same Dashboard
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**:

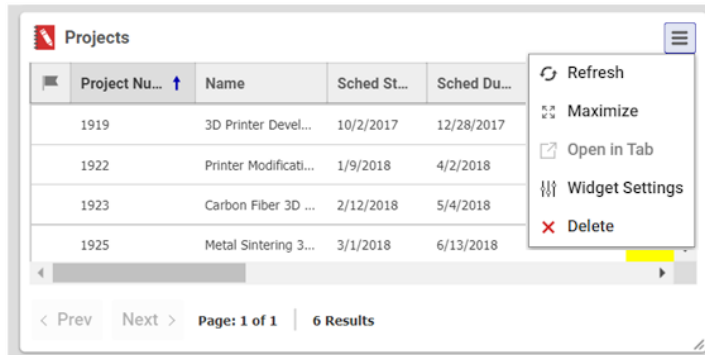
Field	Description
Label	Widget Name. This is an optional field.
Icon	Widget Icon. This is an optional field.
Width & Height	Width and Height of the Widget. This is an optional field. Enable dynamic context selection. Allow the widget's content to be updated from other widgets in the same Dashboard
Tree 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.

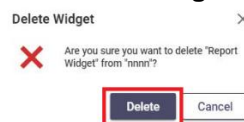
2.8.5 Delete Interactive Widget

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**.



The **Delete Widget** dialog box appears.

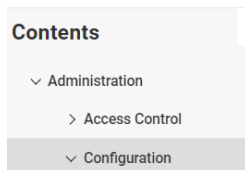


4. Click **Delete**.
5. Click **Done** to save the changes.

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.

Widget Template

Name: Copy of Grid Template Label: Grid Widget

Widget Type: Grid

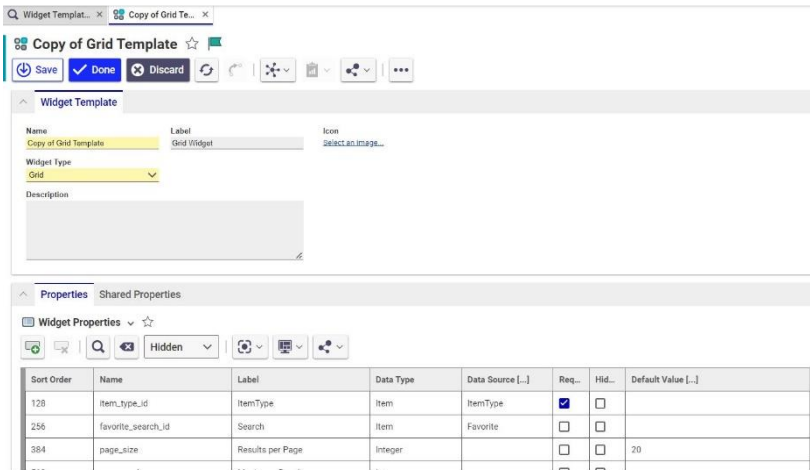
Description:

Properties

Widget Properties

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"/>	
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

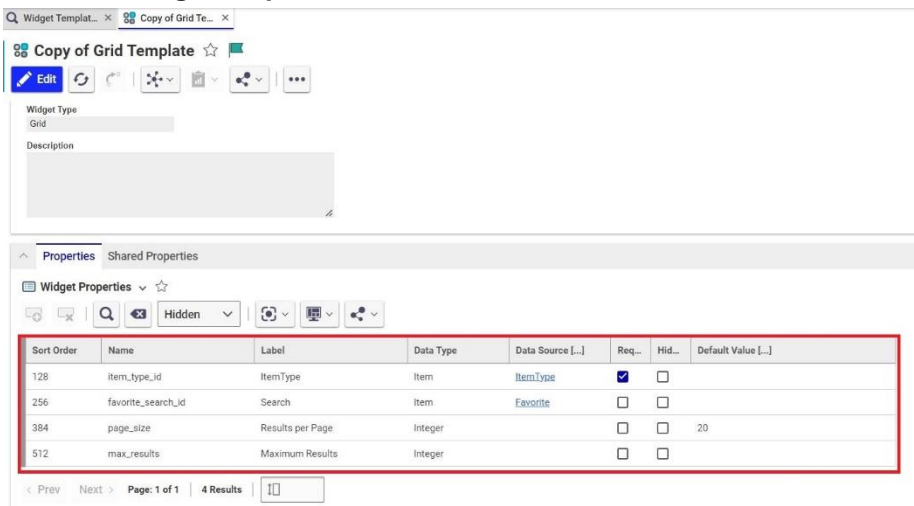
6. Click **Edit**.



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.