Create and Manage Custom Dashboards and Templates

In the Dashboards list, select the dashboard that you want to edit, delete, copy, share, export, or import and click the appropriate button.

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- Widgets
- Import and Export Custom Dashboards and Templates Using the UI

This topic describes how to create and manage dashboards.

Permissions to create, view, edit and delete custom dashboards are set through roles. See Custom Dashboard Visibility and Permissions in Custom Dashboards as well as Roles and Permissions for general information about setting permissions.

Access and Create Custom Dashboards

For controller-level dashboards:

1. Click **Dashboards & Reports** in the menu bar to view the list of existing custom dashboards or to create a new one.
2. If there are existing dashboard names displayed, click **Dashboards** to see them.
3. Click **+ Create Dashboard** to create a new custom dashboard.
4. Add widgets to the dashboard.
5. To save the dashboard, click **OK** in the Create Dashboard window.

For tier/node-level dashboard templates:

1. In an application, in the built-in tier or node dashboard in which you want to create or use a custom dashboard template, click the **My Dashboards** tab.
2. If there are no associated custom dashboards for the entity, click **+ Create a new Custom Dashboard** to create a new one.
3. If you want to associate an existing dashboard with the entity, click **Associate Dashboards** from the dropdown list of the dashboard with which you want to associate the entity. See Associate a Custom Dashboard Template with a Tier or Node for more information.

A dashboard has no content until you add widgets to it. See Widgets for details.

General Dashboard Characteristics

- Name: Dashboard names must be unique per controller.
- Two layout types:
    - Grid: This is the default type that gives you a flexible layout that is easy to rearrange on the canvas. Grid layout also scales in size when viewed on mobile devices. You cannot overlap widgets using this layout type.
    - Absolute: Use this type to control width and height and exact placement of widgets on the canvas. With absolute layout, you can overlap widgets and use Send to Front or Send to Back actions to control what is displayed.
- Configurable auto-refresh Interval: Sets the data refresh rate in seconds.
- Dashboard Time Range: This setting applies only to controller-level dashboards. From the Time range dropdown list you can set a global time range for the dashboard. When you add widgets, you can specify whether the widgets use this global time range or a widget-specific time range. If you do not specify a widget-specific time range, the global time range is used for all the widgets.

Accessing the Dashboard Operations

While you are in edit mode, your changes are automatically saved. To save changes manually, disable Auto-Save and click the save icon. There is no way to save your changes manually. If you are accessing a dashboard on a mobile phone click the Mobile icon for a better viewing experience.

To access various operations concerning the dashboard, click **Actions**.

Widget Operations

You must be in edit mode to add and modify widgets. See Widgets for details on setting up widgets.

To access the widget palettes:

In the dashboard configuration window, click **+ Add Widget**.

To add a widget to the dashboard:

1. In the left panel of the Add Widget window select the context.
2. Click the widget in the palette on the right.

To view and edit the widget properties window:

Click the gear icon in the upper right corner of the widget.

To delete one or more widgets:

Select the widgets and click **Delete**. Or right-click the widget and select **Delete**.

To duplicate one or more widgets:

Select the widgets and click **Duplicate**. Or right-click the widget and select **Duplicate**.

To copy/paste a widget:

Select the widget and click **Copy**, then click **Paste**.

or

- Select the widget, right-click, and select **Copy**.
- Right-click the widget again, and select **Paste**.

To edit the properties of multiple widgets:

1. Hold down your command key and select the widgets you want to edit the properties for.
2. Click **Edit**.
3. From the Edit <number of widgets> Widgets dialog box, select the properties you want to apply to all the widgets, and click **OK**.

Note that not all widgets share the same properties, and Analytics widgets cannot be edited using the multi-widget editing feature.

Delete or Modify a Custom Dashboard

For existing controller-level custom dashboards:

1. Click **Dashboards & Reports**.
2. Click **Dashboards**.
3. In the Dashboards list, select the dashboard that you want to edit, delete, copy, share, or export and click the appropriate button.

For existing dashboard templates:

In the My Dashboards tab of an entity associated with the dashboard:

- To modify an existing dashboard template, select it in the list and click **Edit**, pencil.
- To remove an existing dashboard, click **Manage Dashboards** from the drop-down list, select the template in the list, and then click **Delete.**

Associate a Custom Dashboard Template with a Tier or Node

The My Dashboards tab of the built-in tier and node dashboards provides access to custom dashboards that are associated with the tier or node.

To view an associated custom dashboard populated with data from the entity, click the dashboard in the list displayed by the My Dashboards tab.

To associate one or more existing dashboard templates with the entity, do the following:

1. Click **Associate Existing Dashboard with the Tier/Node** for an entity that has no associated dashboards.
   Alternatively, click **Associate Dashboards** from the dropdown list for an entity that already has at least one associated dashboard.
2. In the dashboard picker, move the dashboards to associate from the Available Dashboards list to the Selected Dashboards list.

To disassociate a dashboard template with an entity:

1. In the dropdown list, click **Associate Dashboards**.
2. In the dashboard picker, move the dashboards to disassociate from the Selected Dashboards list to the Available Dashboards list.

Dashboard Templates Associated Across Applications

All the widgets in a custom dashboard template that is associated with a tier or node in a different application must use the default baseline, if they use a baseline.

To set a widget's baseline to the default baseline, or to verify that it is set, in the Select Baseline section of the Advanced panel of the widget Edit Series window, select **Default Baseline**.

Manage Custom Dashboard Templates

To perform miscellaneous operations on dashboard templates:

1. In the dropdown list click **Manage Dashboards**.
2. From the Tier or Node Dashboards window you can:

    - Delete, copy, import, export a selected dashboard template
    - Create a new dashboard template
    - Associate an existing template with tiers or nodes in the application
    - View and edit an existing dashboard template