



blueprism

The Operational Agility Software Company

Blue Prism

Guide to the Blue Prism Dashboard

Revision History

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1 Introduction

This document is a guide to using the Dashboard feature of Blue Prism introduced in version 5. Dashboards are a new feature allow users of Blue Prism to quickly view information on various aspects of the virtual workforce and Blue Prism environment. Dashboards are essentially a saved view of a collection of tiles, with each tile being a visualisation of data. Subject to being granted appropriate permissions, users can create, and edit existing dashboards within the Dashboard tab.

2 Working with Dashboards

2.1 Creating a Dashboard

A new dashboard can be created from the Dashboards tab in the Dashboard section. Selecting the right-click option **Create Personal Dashboard** or **Create Global Dashboard** will create either a new Personal or Global Dashboard.

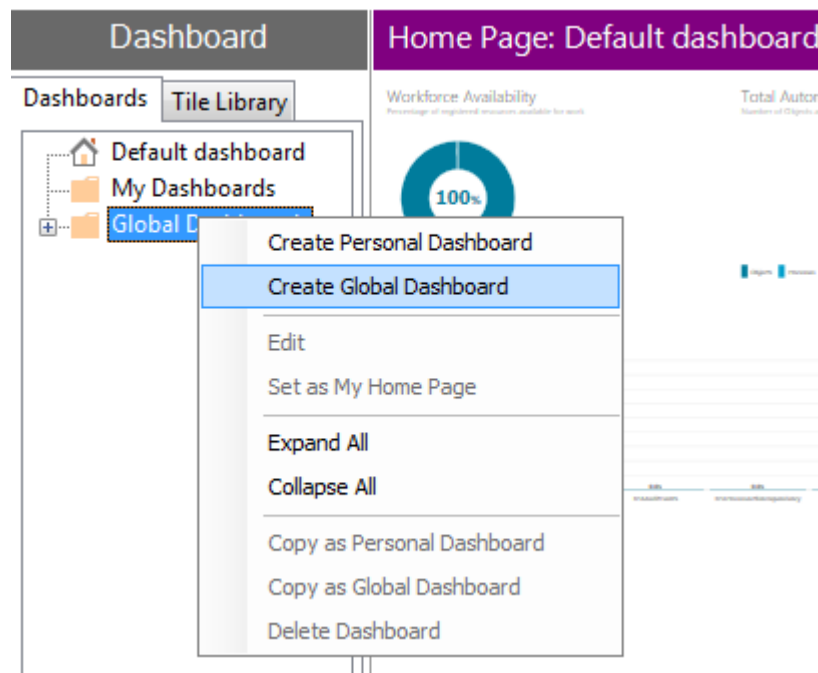


Figure 1 Dashboard Right Click Menu

There are two kinds of dashboards:

- **Personal Dashboards.** These are dashboards that are created by the logged-in user. They are only visible to that user.
- **Global Dashboards.** These dashboards are available to all users who have the appropriate permissions in the Dashboard security group. The Dashboard permission “Design Global Dashboards” controls access to this dashboard type.

2.2 Editing a Dashboard

To edit a dashboard the appropriate Dashboard permission must be assigned to the user's role (see the Permissions chapter of this document). Once a dashboard is selected in the Dashboard panel, the Edit option becomes available from the right click context menu. Selected the Edit option will place the selected dashboard into edit mode, which will allow for changes to be made to the design of the dashboard content.

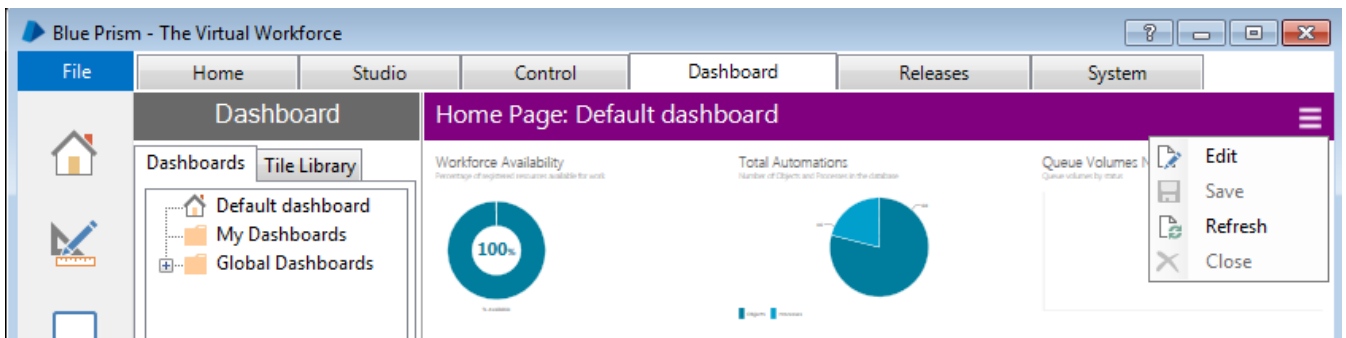


Figure 2 Edit Option

Edit Mode is indicated by the appearance of vertical lines on the dashboard and by the dashboard name field having a highlighted border. No operations outside of the dashboard can be done while the dashboard is in edit mode. A dashboard will remain in edit mode until the dashboard is saved or the editing is cancelled.

Whilst editing a dashboard the following operations are possible:

- Adding a tile
- Sizing and removing tiles
- Moving a tile in a dashboard
- Adding a dashboard title
- Saving the dashboard
- Cancelling edit mode

The following operations are only possible when a Dashboard is in edit mode. A dashboard cannot be copied while it is in edit mode.

Adding a title to a dashboard

To add a tile to a dashboard select the Tile Library tab to display the list of available tiles. Drag and drop a tile onto the dashboard. Tiles can be dropped into any of the blank sections where no tile currently exists.

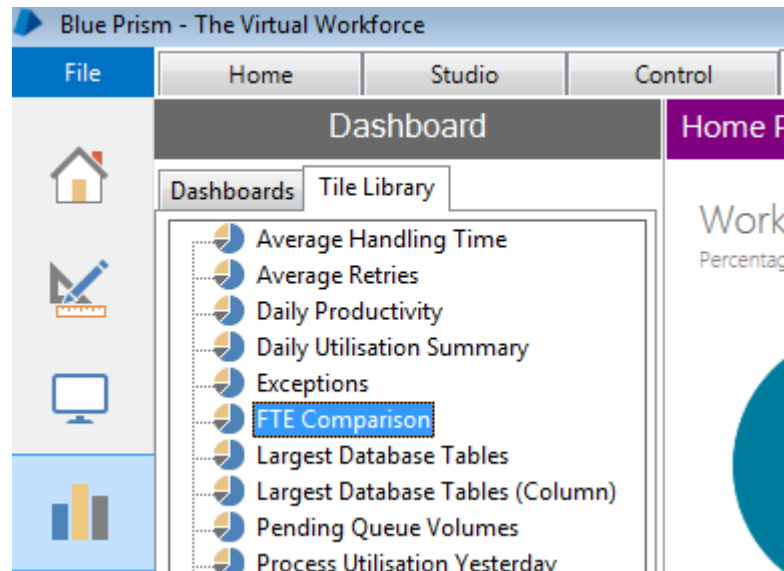


Figure 3 Click and Drag a tile onto the dashboard

If a tile is dropped either side of another existing tile, then it will take the place of that tile and cause the adjoining tile to be moved to the location indicated by the positional arrow. Positioning is dependent upon the size of the tile.

Sizing and removing tiles

When a tile is right-clicked in edit mode then a context menu is shown revealing options to select the size of tiles, or remove them:-

- Small – the tile occupies one square of the grid
- Medium – the tile occupies two squares of the grid
- Large – the tile occupies one row of the grid
- Remove – the currently selected tile is removed from the dashboard
- Remove All Tiles – all tiles in the dashboard are removed

Total Automations

Number of Objects and Processes in the database

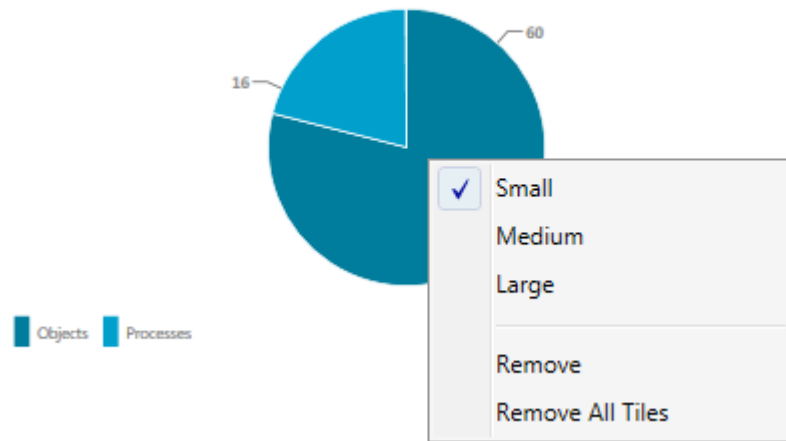


Figure 4 Resizing options

Moving a tile in a dashboard

A tile can be dragged and dropped into any other position on the dashboard grid. Small sized tiles will fit into a single grid space, whilst medium and large sized tiles may need to occupy two or three tile spaces.

When tiles are moved surrounding tiles will be automatically moved to fit alongside them. A positional arrow indicator will be shown during the drag operation to point to the destination space when the tile is dropped on to the dashboard.

Adding a title in a dashboard

Whilst the dashboard is in Edit Mode the title area is editable, and this is indicated by the field being white with a highlighted blue border.

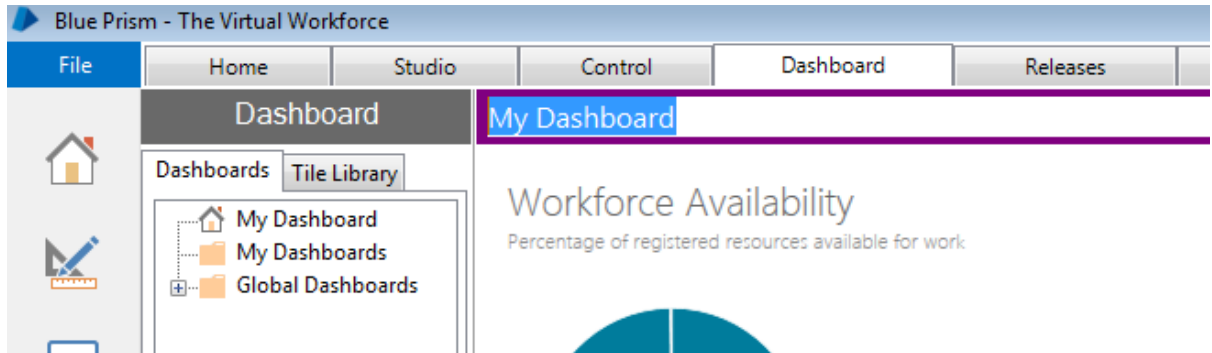


Figure 5 Changing a Dashboard title

Saving the dashboard

When no further editing is required then the Dashboard can be saved using the **Save** button in the dashboard's drop-down menu. Any changes made during the editing operations will be retained. The dashboard will no longer be in Edit Mode when the Save button is clicked. This is indicated by the title reverting to the full colour of the currently selected colour scheme.

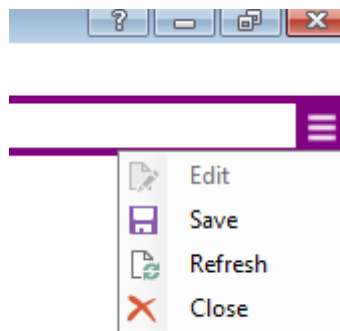


Figure 6 Save changes to a dashboard

Cancelling Edit Mode

Selecting the **Close** option in a dashboard's drop-down menu will close the dashboard. Any un-saved changes will reveal a prompt message asking whether any current changes should be discarded. Select 'Yes' to discard changes, cancel editing the dashboard, and revert the dashboard to its previous saved state. Select 'No' to continue working with the dashboard in edit mode.

2.3 Deleting a Dashboard

To delete a dashboard select it, then select **Delete Dashboard** from the right-click context menu.

A dashboard that is set as the current Home Page dashboard for all users cannot be deleted. The **Default dashboard** also cannot be deleted. A dashboard cannot be deleted while it is in edit mode.

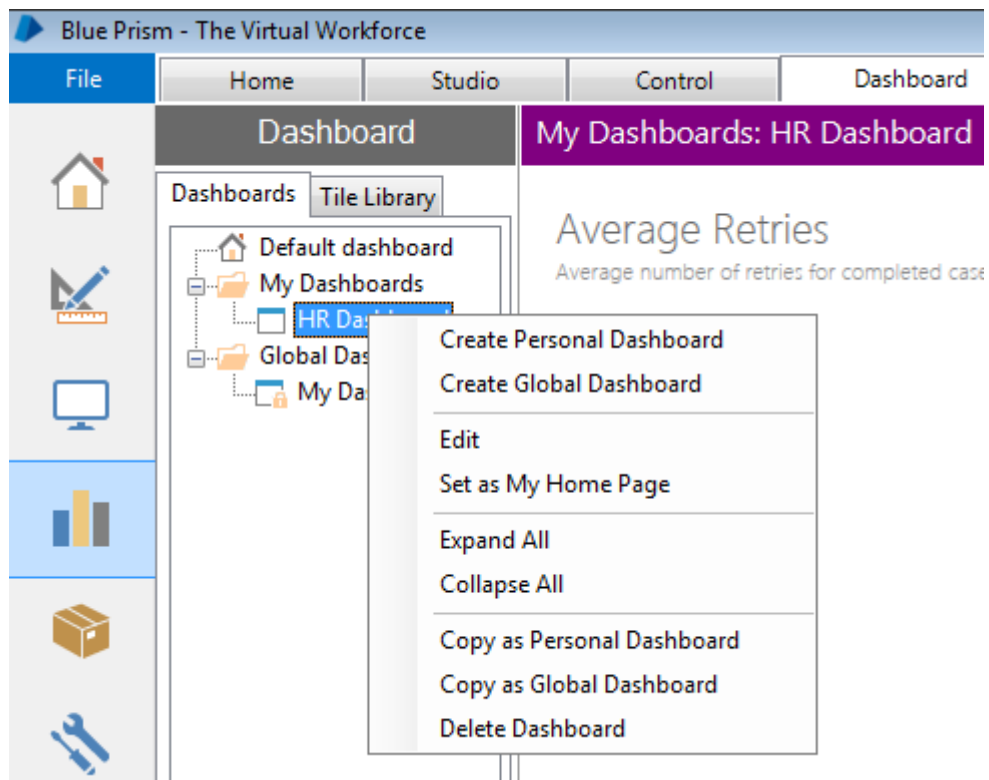


Figure 7 Delete a dashboard

2.4 Setting the Home Page

Any dashboard can be selected to be shown on the Home Page. If a Personal Dashboard is chosen for the Home Page then it will only be seen on that page by the current user. If a Global Dashboard is chosen for the Home Page then it will be seen by all users.

To set a new Home Page dashboard select the dashboard from the list available in the Dashboards panel. From the right-click context menu select **Set as My Home Page**. The dashboard will be shown at the top of the list of dashboards, and will be shown on the Home screen for the appropriate users.