

Aras Dashboards

The purpose of this section is to describe how dashboards work on the Aras Innovator platform.

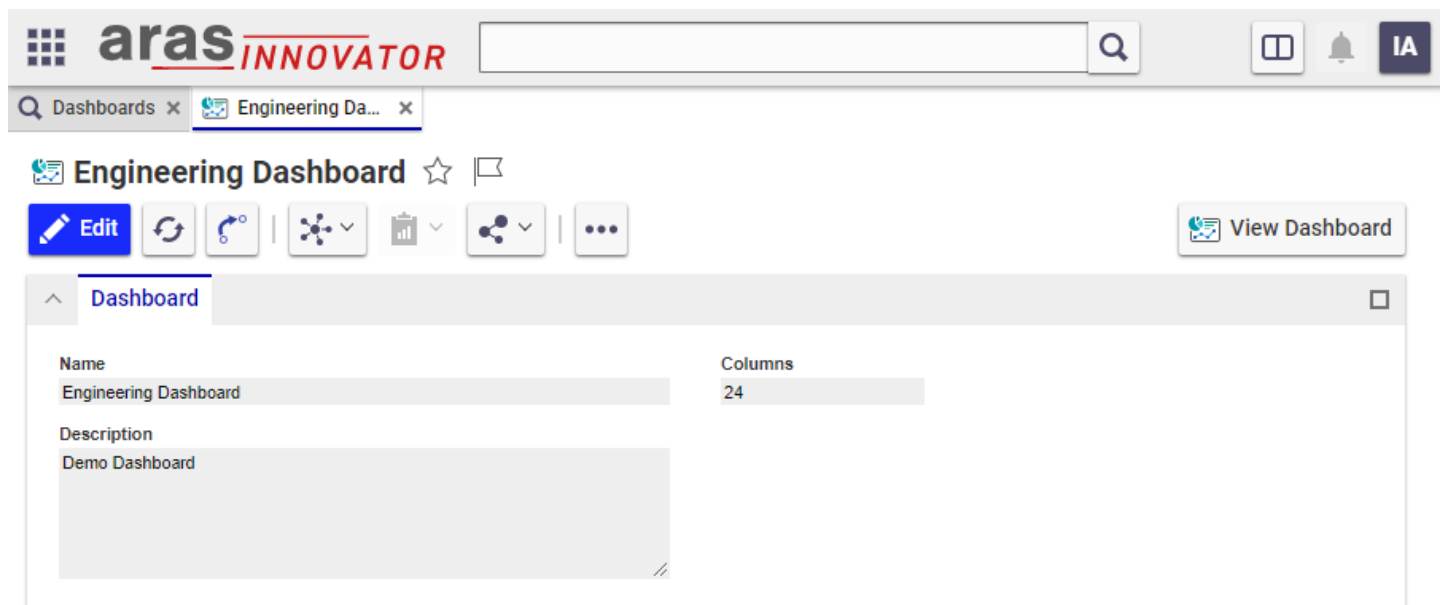
Purpose of Aras Dashboards

Aras Dashboards provide configurable views that can be populated with interactive widgets for displaying and navigating data. Dashboards are a low-code feature, meaning that users are not required to have coding skills or admin experience to build or use dashboards.

Understanding Aras Dashboards

This section describes the important ItemTypes and properties that define Aras Dashboards.

Dashboards



Dashboard settings for name, description, and columns A Dashboard item defines the name, description, and column configuration of a Dashboard. All Widgets shown in a Dashboard are related to this root item.



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Properties
Shared Properties

Shared Properties
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x

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x

Hidden
▼

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Name	Data Type
selected_row_id	String

Other Widgets present a new configuration property to "Enable Dynamic Context Selection". This setting will allow them to receive the selection from a Grid widget in the same Dashboard and update the selected context item dynamically, loading the updated content. This underlying capabilities can be leveraged in any custom widget and the details are described in the Aras Innovator Client Documentation (javascript API Reference)

Widget Types

Widget Types determine how the content of a widget is displayed. Different Widget Types will require different properties to correctly render the UI controls. Here is a list of the default Widget Types provided with the Aras Innovator platform, as well as their required or optional properties.

Grid Widget Type

^
Properties

Widget Properties
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Sort Order	Name	Label	Data Type	Data Source [...]	Req...	Hid...	Default Value [...]
128	item_type_id	ItemType	Item	ItemType	☒	☒	BC7977377FFF40D59FF14205914E9C71
256	favorite_search_id	Search	Item	Favorite	☐	☒	4973B824B9474F06A1E7DD787BF41E9B
384	page_size	Results per Page	Integer		☐	☐	20
512	max_results	Maximum Results	Integer		☐	☐	
640	search_criteria	Search Criteria	Text		☐	☒	<Item type="InBasket Task" action="get" pa...



Widget Properties for a custom Grid Widget Template

- **ItemType**
 - Specifies the type of items in the widget grid
 - Required property
 - Default Value: id of the ItemType to be displayed
- **Search**
 - Specifies the favorite search used to populate the widget grid
 - Optional property
 - Default Value: id of a favorite search item (optional)
- **Results per Page**
 - Specifies the number of rows that will be displayed per page in the grid
 - Optional property
 - Default Value: integer (optional)
- **Maximum Results**
 - Specifies the maximum number of items that will be loaded into the widget grid (across all pages)
 - Optional property
 - Default Value: integer (optional)
- **Search Criteria**
 - Specifies the search criteria used to populate the widget grid
 - Required *if* the Widget Template has a default value for Search
 - Default Value: AML contents of the Saved Search that corresponds to the default favorite search

Important

The easiest way to create a new Grid Widget Template is to use the Save As action on the out of the box Grid Widget Template.

Tree Grid Widget Type



Properties							
Widget Properties + ✖ 🔍 🔗 Hidden 🔗 🖨 🔗							
Sort Order	Name	Label	Data Type	Data Source [...]	Req...	Hid...	Default Value [...]
128	tgvd_id	Tree Grid View	Item	rb_TreeGridViewDe...	☒	☐	F367735B68CB47A89DDAA39BD98F7560
256	item_id	Context Item	Item		☒	☐	5266E1D280F84861A1BBCF5E50A9C65B
< Prev Next > Page: 1 of 1 2 Results 🔄							

Widget Properties for a custom Tree Grid Widget Template

- **Tree Grid View**

- Specifies the Tree Grid View Definition that will be displayed in the widget
- Required property
- Default Value: id of the TGV to be displayed

- **Context Item**

- Specifies the root item that will be displayed in the Tree Grid View
- Required property
- Default Value: id of an item – same type as the TGV's root ItemType

Important

The easiest way to create a new Tree Grid Widget Template is to use the Save As action on the out of the box Tree Grid Widget Template.

Report Widget Type

Engineering Dashboard ☆

Edit ↻ ↺ ⚙️ 🗑️ 🔍 ⋮

Dashboard Settings

My Tasks

i.	Type	Source Item	Activity	Start Date [...]	Due Date [...]
◆	Project Task	1922 Printer Mo...	Mechanical Product Design	1/22/2018	2/2/2018
◆	Project Task	1319 Test Project	Activity 1	5/17/2022	5/19/2022
■	Workflow Task	WAV-100002	Submit Waiver	5/23/2022	5/23/2022

< Prev Next > Page: 1 of 1 11 Results

Parts, CAD, & Docs

Type	Item Number	Revi...	Name
Part	MP1794	B	MK7 Filament Drive Block Front
CAD Document	MP2729 Schematic	E	Makerbot MightyBoard Schematic
CAD Document	MP1705	B	MK7 Thermal Core
Part	MP2343	E	Botstep 17
Part	MP2407	B	Thing-O-Matic 2 Extended Rod Gui...
Part	MP2199	A	Thing-O-Matic 2 Right Panel

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Projects

Project Num...	Name	Sched St...	Sched Du...	Status	Ph 1	Ph 2	P
1319	Test Project	5/17/2022	6/8/2022	Active	20	0	

The red box highlights one of many Widgets in this Dashboard. A Widget is an instance of a Widget Template that defines and renders an interactive control for displaying and navigating data in a Dashboard. Each Widget displays live data and has settings that can be configured by the end user. These settings are based on the properties defined on the Widget Template.

Configuring Dashboard Permissions

The default permissions for Aras Dashboards include three out of the box group identities. To easily configure permissions, simply add identities of individuals or groups to these identities.

Access

Identities ☆

⊕ ⚙️ 🗑️ 🔍 🗑️ Hidden ⚙️ 🗑️ 🔍 ⋮

Name	Get	Update	Delete	Can Discover	Show Permissions ...	Can change access
Dashboard Authors	☒	☐	☐	☒	☐	☐
Dashboard Administrators	☒	☒	☒	☒	☐	☒
Dashboard Viewers	☒	☐	☐	☒	☐	☐
Creator	☒	☒	☒	☒	☐	☐

Default permissions for Dashboard items

Dashboard Administrators



Dashboard Administrators have the broadest permissions. Not only can they view and create Dashboards, but they can also edit, delete, and change the permissions of Dashboards created by any user. Dashboard Admins are also the only group that can create and edit Widget Templates for other users.

Dashboard Authors

Dashboard Authors have the next broadest permissions. They can view and create Dashboards, but they can only edit or delete the Dashboards they created themselves. Dashboard Authors have permission to view Widget Templates, but they aren't able to create or edit templates.

Dashboard Viewers

Dashboard Viewers have the narrowest permissions. They can view Dashboards, but they cannot create, edit, or delete them. They cannot view, create, or edit Widget Templates.

Important

Any users who do not belong to one of these three identities cannot access Dashboards, unless the permissions are customized, or a specific Dashboard has a private permission that overrides the default permission model.

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.

Important

For detailed instructions refer to Aras Innovator Product Engineering User's Guide Section Defining Product Permissions



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

