Creating a Dashboard

Job Aid

Creating a Dashboard

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Conventions Used

The following typographic conventions are used throughout this course:

► **Bold orange** text denotes the name of a tool, tool option, icon, button, window option, object names, element names, items in the tree, or items in a product structure.

► **Bold** text within a sentence is used to apply emphasis on key words.

► Text enclosed in [brackets] corresponds to the text that must be entered into a text field of a dialog box or prompt.

► Text enclosed in <chevrons> corresponds to keystrokes.

Example:

Use the following steps to create a new document:

1. In the top menu bar
   a. Click **Add** > **Content…**

   b. From the **Favorites** section, select **3D Part**.

   c. Type [My_First_Document] as **Title**.
   d. Press <Ctrl+S> to save the document.

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🕐 30 minutes

Module Objectives

By the end of this module you will be able to create and customize a dashboard for use in later exercises.

Module Content

▶ Create and Name a Dashboard
▶ Add Tabs to Your Dashboard
▶ Add Widgets to Your Tabs
▶ Rearrange a Tab
▶ Share a Dashboard
▶ Manage a Dashboard

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Log In

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1. Using Chrome, access the 3DEXPERIENCE platform: ①
   https://vmlearning19xdsy.3dseduc.com/3dspace.
2. Enter Login Information
   a. **User ID**: DesignEngineer1
   b. **Password**: Passport1
   c. Click **Log In**.

Note: This scenario is based on a training exercise so the login information is for a training environment. For your purposes, use the URL as well as your own login credentials.

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Navigate to 3DDashboard

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To create and customize your dashboard, first you need to launch the **3DDashboard** Web App.

1. Click on the **East** quadrant of the Compass (Information Intelligence Apps).
2. Collapse the **3DEXPERIENCE Marketplace** section of the **Compass** panel by clicking the downwards arrow.
3. Collapse the **My Roles/Profile** section of the **Compass** panel by clicking the downwards arrow.

TIP If the panels are already collapsed then you can skip these steps.

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Navigate to 3DDashboard (cont.)

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5. Click on the **3DDashboard** Web App.
6. Close the pop-up window if needed.
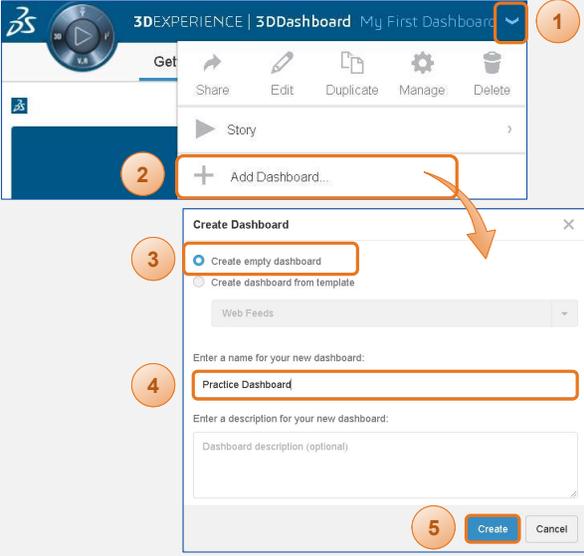
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Create a New Dashboard — Job Aid

You will now create the dashboard that you will use in this and later exercises.

1. Click the drop-down menu of **My First Dashboard**.

TIP If you have previously created a dashboard, then the default option may not be **My First Dashboard**.

2. Select **Add Dashboard** from the drop-down menu.
3. Make sure **Create empty dashboard** is selected.
4. Enter [Practice Dashboard] in the **Dashboard name** field.
5. Click **Create**.

3DEXPERIENCE | 3DDashboard My First Dashboard

Get
Share Edit Duplicate Manage Delete
Story
Add Dashboard...

Create Dashboard
Create empty dashboard
Create dashboard from template
Web Feeds
Enter a name for your new dashboard:
Practice Dashboard
Enter a description for your new dashboard:
Dashboard description (optional)
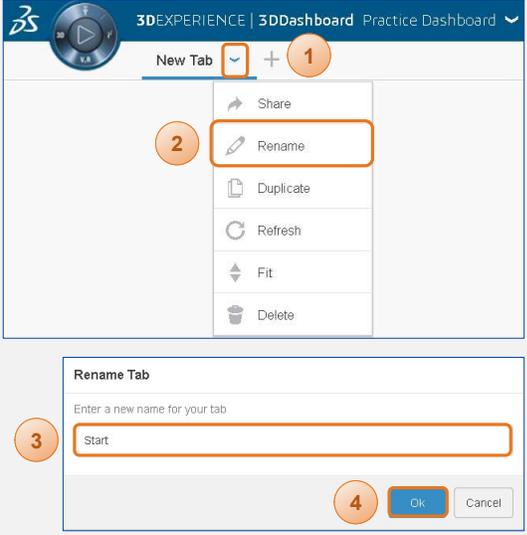Create   Cancel

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Rename Tabs — Job Aid

Tabs allow for a customizable workspace and convenient access to widgets.

1. Click the drop-down menu of the **New Tab**.
2. Select **Rename**.
3. Enter [Start].
4. Click **Ok**.

3DEXPERIENCE | 3DDashboard Practice Dashboard
New Tab +
Share
Rename
Duplicate
Refresh
Fit
Delete

Rename Tab
Enter a new name for your tab
Start
Ok   Cancel

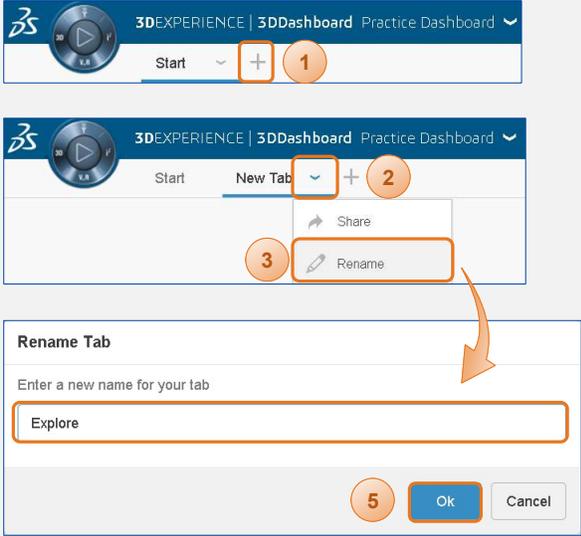**Creating a Dashboard**

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Add a New Tab   Job Aid

1. Click the **Add new tab** button on the Tab bar.
2. Click the drop-down menu of the newly created tab.
3. Select **Rename**.
4. Enter [Explore].
5. Click **Ok**.
6. Repeat steps 1-5, but this time name the tab [Product Release].
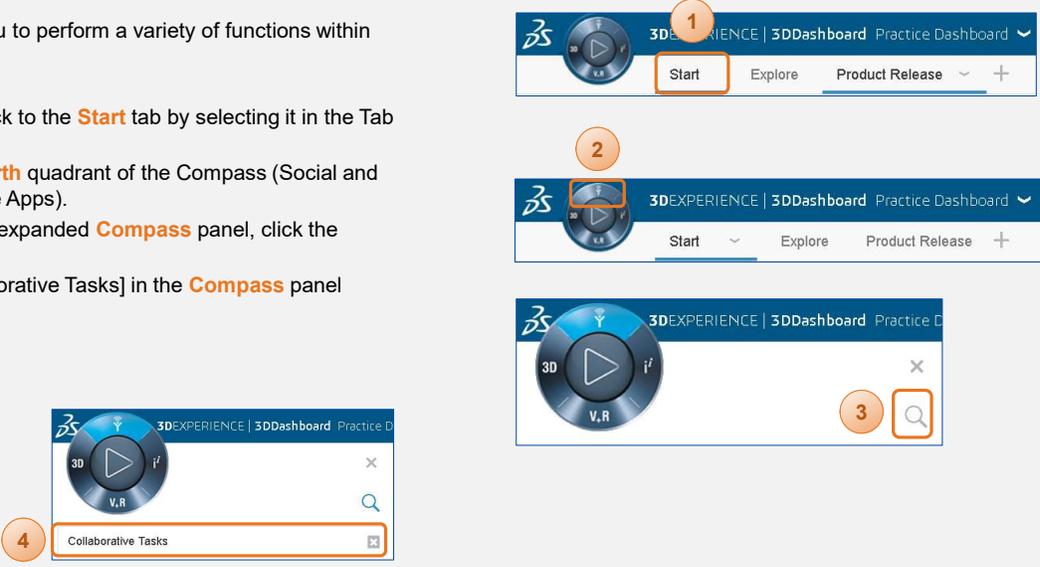

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Add Widgets to the Start Tab   Job Aid

Widgets allow you to perform a variety of functions within tabs.

1. Navigate back to the **Start** tab by selecting it in the Tab bar.
2. Click the **North** quadrant of the Compass (Social and Collaborative Apps).
3. In the newly expanded **Compass** panel, click the **Search** icon.
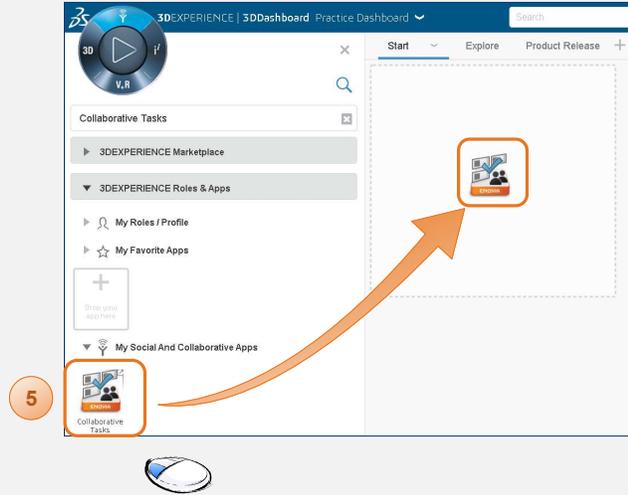4. Type [Collaborative Tasks] in the **Compass** panel **Search** field.

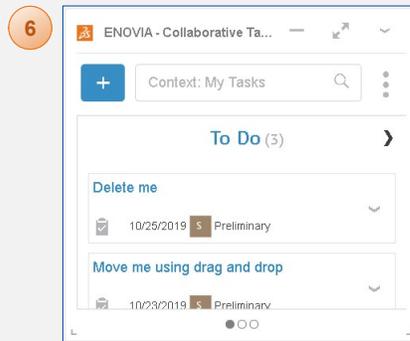**Creating a Dashboard**

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Add Widgets to the Start Tab (cont.)

5. Drag and drop the **Collaborative Tasks** widget from the **Compass** panel to an open space on your **Start** tab.

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Add Widgets to the Start Tab (cont.)

6. You should now see the **Collaborative Tasks** widget on your **Start** tab.
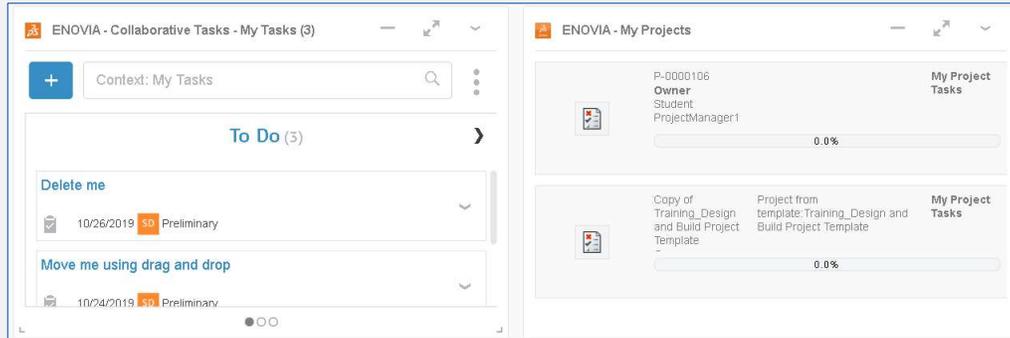7. Repeat steps 4-5 to add the **My Projects** widget to the **Start** tab.

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Add Widgets to the Start Tab (cont.)

8. These are the widgets that should be in your **Start** tab, while the tasks and projects will look different depending on what is assigned to you:

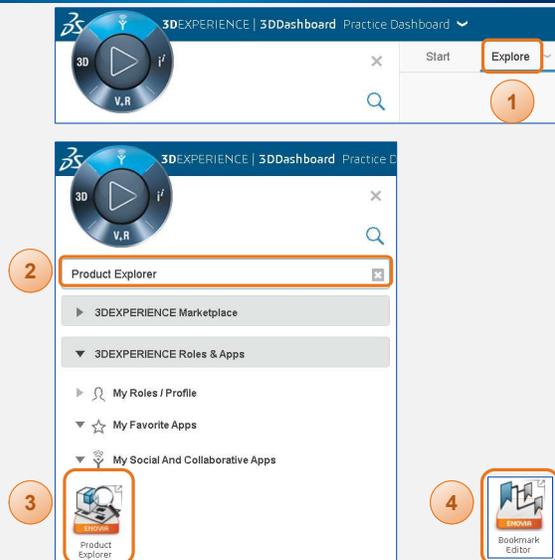Creating a Dashboard

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Add Widgets to the Explore Tab

1. Navigate to the **Explore** tab by selecting it in the Tab bar.
2. Type [Product Explorer] in the **Compass** panel **Search** field.
3. Similar to before, drag and drop the **Product Explorer** widget to your **Explore** tab.

> **Note:** Dragging the **Product Explorer** widget from the **Compass** panel will automatically add the **Product Structure Explorer** and **3D Navigate** widgets to your dashboard.

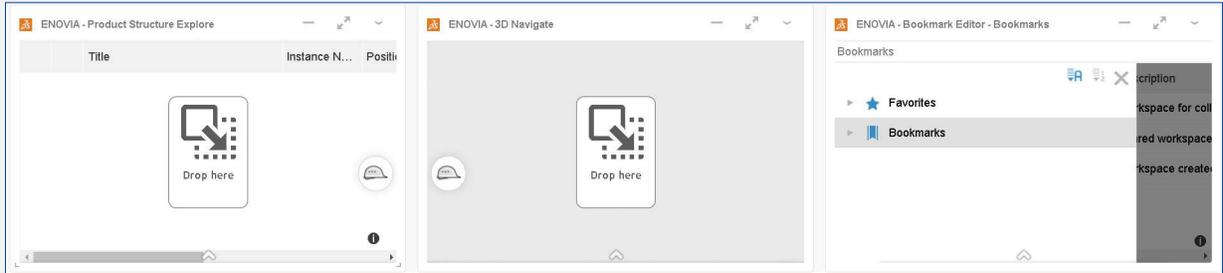4. Repeat steps 2-3 to add the **Bookmark Editor** widget to the **Explore** tab.

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Add Widgets to the Explore Tab (cont.)   Job Aid

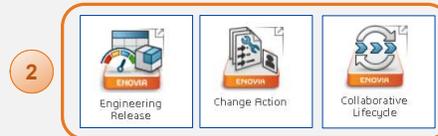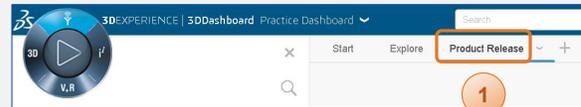5. This is how your **Explore** tab should look at this point:

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Add Widgets to the Product Release Tab   Job Aid

1. Navigate to the **Product Release** tab by selecting it in the Tab bar.
2. Using the same process as before, add the **Engineering Release**, **Change Action**, and **Collaborative Lifecycle** widgets to your **Product Release** tab.

Note: Some searches will return multiple results with the same name. Be sure to drag and drop the **widget**, which can be identified by the arrow in its icon's **top right corner**.
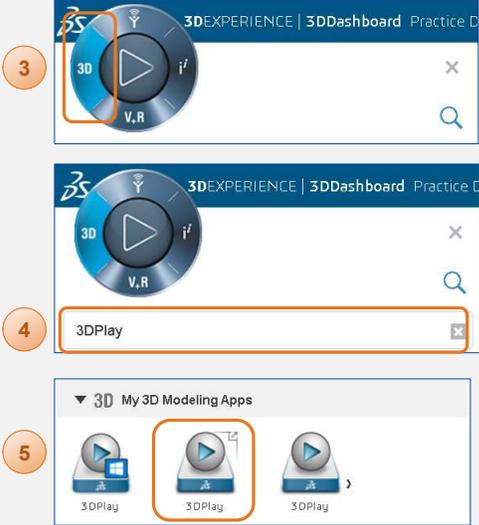
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Add Widgets to the Product Release Tab (cont.) — Job Aid

3. Click on the **West** quadrant of the Compass (3D Modelling Apps).
4. Type [3DPlay] in the **Compass** panel **Search** bar.
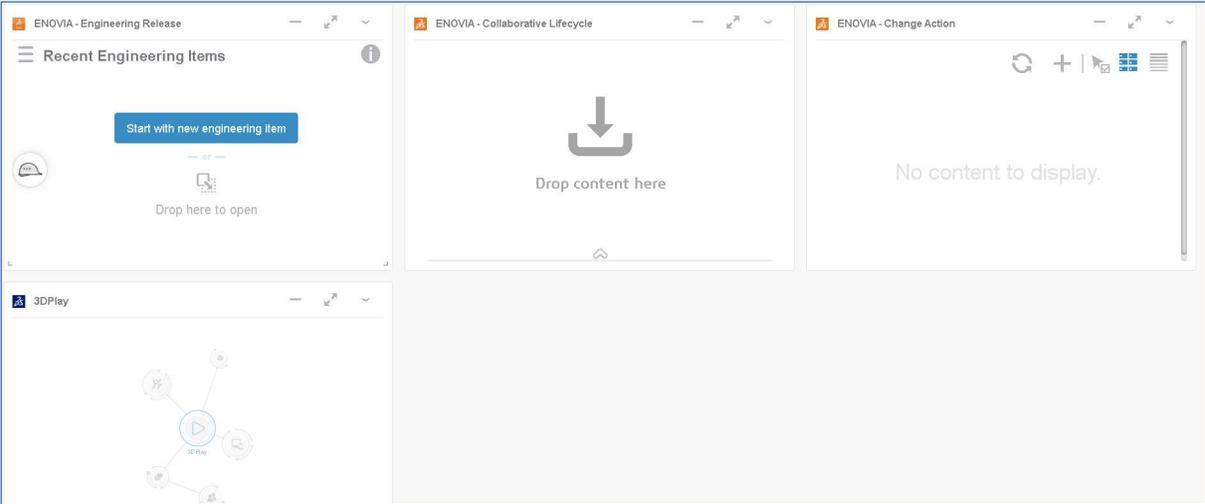5. Drag and drop the **3DPlay** widget to an open space on your **Product Release** tab.

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Add Widgets to the Product Release Tab (cont.) — Job Aid

6. This is how your **Product Release** tab should look at this point:
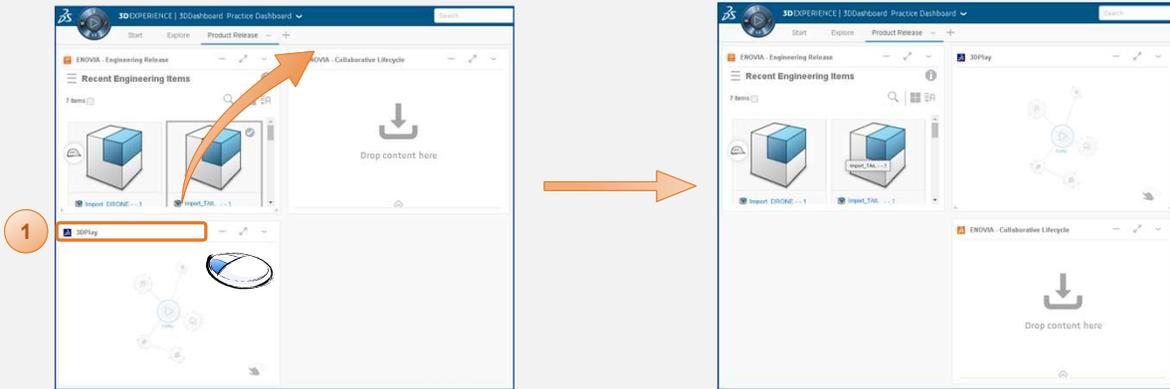

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Rearrange a Tab

You can organize your tabs to make using widgets more convenient.

1. Drag and drop the **3DPlay** widget next to the **Engineering Release** widget.
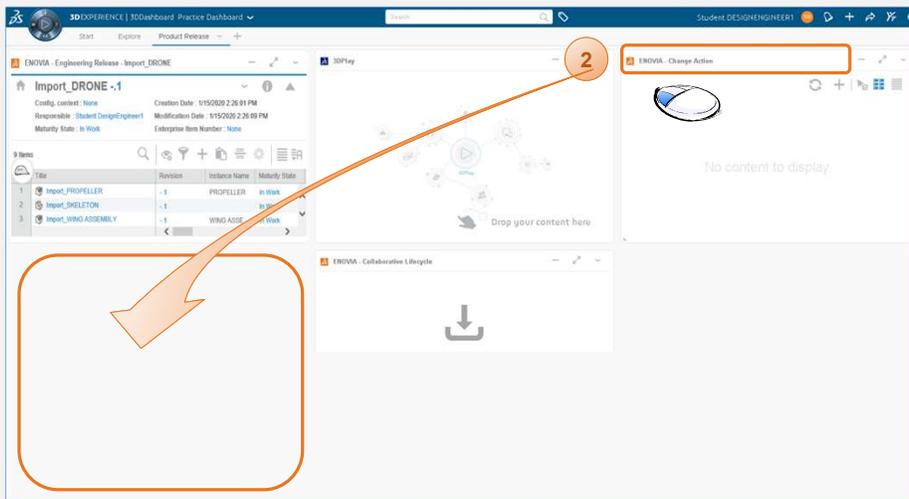

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Rearrange a Tab (cont.)

Workshop Exercise

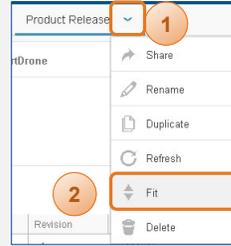2. Drag and drop the **Change Action** widget to the bottom-left corner of the **Product Release** tab.

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Rearrange a Tab (cont.)

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3. Click the **Product Release** tab drop-down menu
4. Select **Fit** to expand the widgets to fit the screen.

TIP The **Fit** option fits all the widgets in the available space in a single screen and avoids having to scroll.

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Share a Dashboard

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► You can share a dashboard that you are the **Owner** of.

► When you share a copy of a dashboard with another user, they will not see any additional changes you make and vice versa.

► The only way to share a dashboard where your edits are continuously viewable by other users is to share the dashboard using the **Manage members of this dashboard** option.

► You can access the **Share Dashboard** panel by clicking the dashboard dropdown menu > **Share**.

► There are three sharing options: **Share a copy of this dashboard with the following users**, **Share a copy of this dashboard by link with anyone**, and **Manage members of this dashboard**.
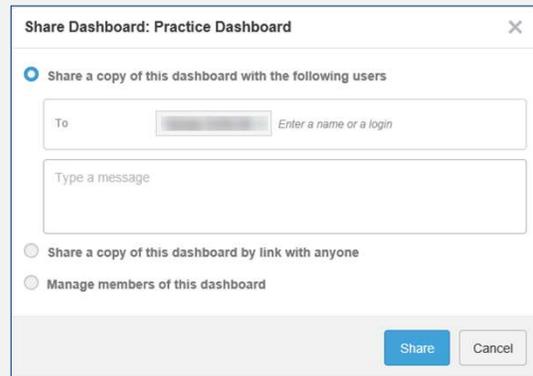
Note: See the next slide for more information about the sharing options.

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Share a Dashboard (cont.)

You can use the following sharing options:

A. **Share a copy of this dashboard with the following users**
   ► Share a copy of the dashboard with one or more users and add a message for the user.

B. **Share a copy of this dashboard by link with anyone**
   ► Share a public copy of the dashboard.

Note: Options A and B only share a copy of the dashboard, so any edits that you make will not be viewable by the user and vice versa.

C. **Manage members of this dashboard**.
   ► Manage members of the dashboard.
   ► Add a user as a **Reader** and they will be able to see your changes, but not edit the dashboard themselves.
   ► Add the user as a **Contributor** and they will be able to see your changes, while you will see their contributions as well.

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Manage a Dashboard as an Owner

1. Click the dashboard drop-down menu, then click **Manage**.
2. **Enter a name or a login** of a user in the **Reader**, **Contributor**, or **Owner** sections.
3. Click **Add**.

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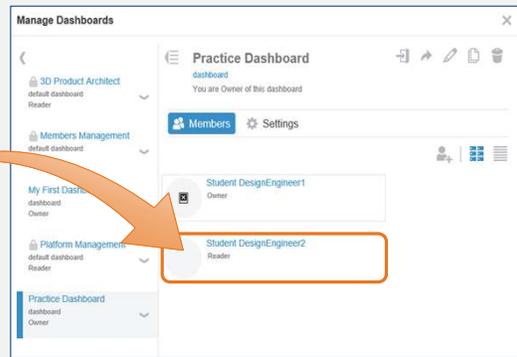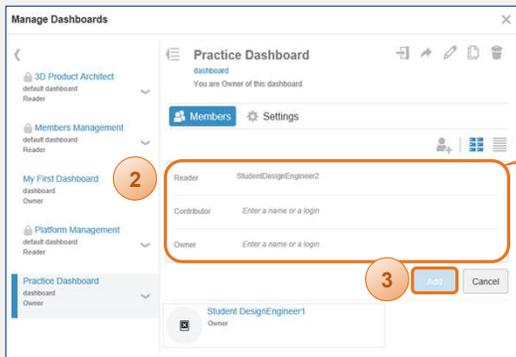
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Manage a Dashboard as an Owner (cont.)

3. Add a user as a **Reader**, and they will have the following capabilities:
    a. **Go to** the dashboard to view any further edits you make, but cannot edit the dashboard themselves.
    b. **Duplicate** the dashboard.
4. Add a user as a **Contributor**, and they will have the following capabilities:
    a. **Go to** the dashboard to view any further edits you make, as well as edit the dashboard. Although, the user cannot modify the structure and properties of the dashboard or the widget position and size.
    b. Click **Unshare** to remove themselves from the dashboard as a contributor.
5. Add a user as an **Owner**, and they will have access to all capabilities.

TIP
You will be able to view any edits that a Contributor makes to the dashboard content.

Note: See the next slide to view the capabilities of the Owner role.
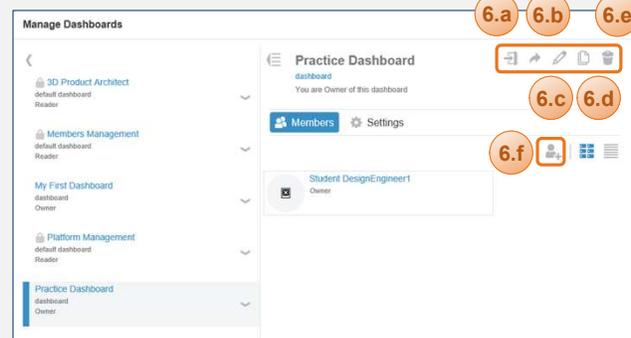
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Manage a Dashboard as an Owner (cont.)

6. With the dashboard selected, the **Manage Dashboards** panel allows you to do the following:
    a. **Go to**: navigate to the selected dashboard.
    b. **Share**: share the dashboard with other users.
    c. **Edit**: enter a new name and description for your dashboard.
    d. **Duplicate**: create a copy of your dashboard that is not shared with other users.
    e. **Delete**: delete the dashboard.
    f. **Add Member**: add a member to your dashboard as a **Reader**, **Contributor**, or **Owner**.

Note: Since you created the **Practice Dashboard**, you have the **Owner** role and have full access to capabilities.

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Manage a Dashboard as an Owner (cont.)   Job Aid

7. Click the **Settings** tab.
8. Click **Browse** to choose a background image from your files, or drag and drop an image into the panel.
9. Click **Apply** to save the changes.
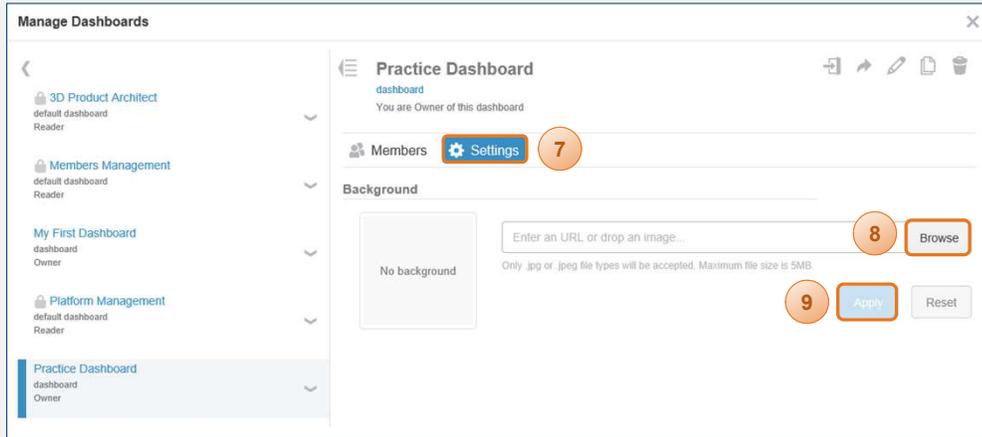
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Manage a Dashboard as an Owner (cont.)   Job Aid

10. Select a dashboard with more than one member.
11. Click the **Members** tab.

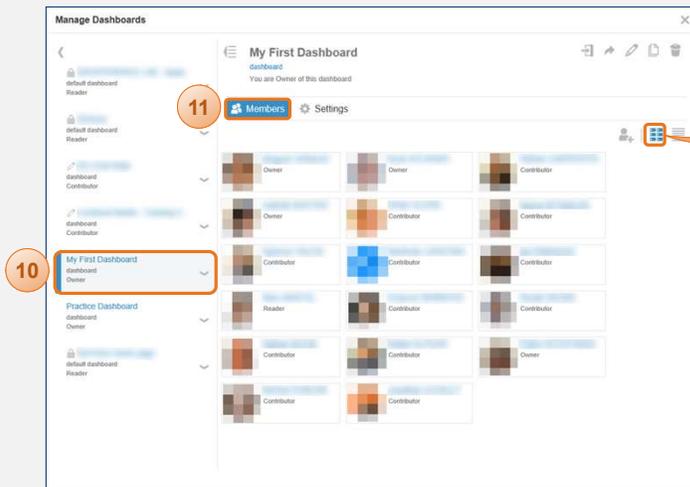**Note:** By default, the members of the dashboard are organized by **Tile View**.

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Manage a Dashboard as an Owner (cont.)   Job Aid

12. Click **Table View** to change the layout of the members listed.

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Manage a Dashboard as a Contributor   Job Aid

1. Select a dashboard that was shared with you as a **Contributor** and do the following in the **Manage Dashboards** panel:
   a. **Go to**: navigate to the selected dashboard.
   b. **Unshare**: remove yourself from the dashboard as a contributor.

Note: Since you are a Contributor of the dashboard, you have limited access to capabilities.

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Manage a Dashboard as a Reader

1. Select a the **3D Product Architect** dashboard, or a dashboard that was shared with you as a **Reader**, then do the following in the **Manage Dashboards** panel:

   a. **Go to**: navigate to the selected dashboard.

   b. **Duplicate**: create a copy of your dashboard that is not shared with other users.

Note: Since you are a **Reader** of the dashboard, you have limited access to capabilities. This is represented by the **lock** icon beside the dashboard name.

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