BrandMaker GmbH

Dashboard
User Manual

Version 7.4

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Content

Start

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The module Dashboard is a start module that allows users and administrators to create homepages. Dashboard allows linking to pages in other modules or to other boards. Dashboard is flexible in structure and presentation. In addition, other widgets and external content can be integrated, for example from Twitter and YouTube.
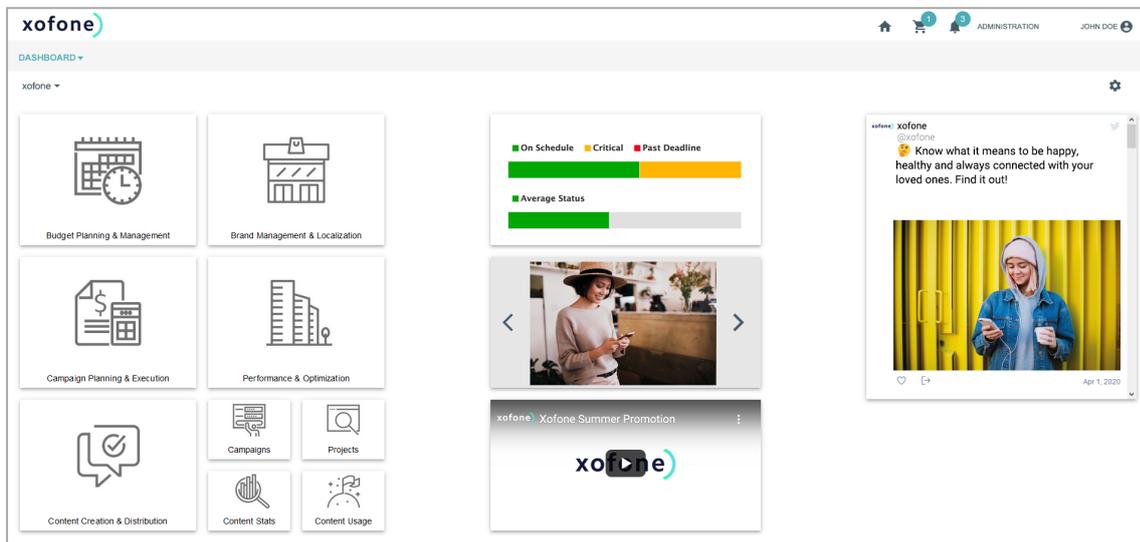
Recommended for new users

If you are not yet familiar with the Dashboard module, we recommend that you first familiarize yourself with the following topics:

For experienced users in a new version

If you are an experienced user and want to have an overview of the new features in the current version, refer to the section *New and changed functions*

1.1   New and changed functions

The following features were introduced in the Dashboard module in version 7.4:

Search widget

With version 7.2, the Rich Text Editor widget is available. It allows you to enter formatted text, images, tables, special characters and source code, among other things.

For more information see *Rich Text Editor* on page 24.

Reports widget

As of version 7.2, the Reports widget is available. The widget allows the user to view reports in a dashboard.

For more information, see *Reports* on page 23.

For a detailed description of all changes, see the release notes of version 7.4.

1.2   Target Group

This manual is intended for users who apply the module Dashboard to use, create and edit boards as homepages. Administrators will learn which rights your users will have with which possibilities in the module.

> **Hint:** The rights and roles concept can be used to define which functions a user is allowed to execute in the BrandMaker Marketing Efficiency Cloud. A user is linked with a role. Rights are assigned to the role. The rights an roles concept is implemented on a customer-specific basis. If you are unable to call functions or areas that are described in this manual, it may be because you do not have the necessary rights. If you have any questions, please contact your system administrator.

1.3 Style Conventions

Notes appear in a dark gray box.

Warnings appear in a red framed text box.

Paths to follow are written like this: *Click > x and then > y.*

1.4 Further documentation

This page provides links to documents containing additional information:

- Administration Manual
- Basic User Guide
- Media Pool User Guide

General inform-
ation
2

This chapter gives you basic information about the module Dashboard.

Boards

The module Dashboard consists of boards. When you reach the module, you can see public and shared boards. You select a board from the drop-down list in the upper right corner:

The drop-down list can be divided into up to three sections:

- Administrator boards: These boards are created by administrators, shared with a specific user and can be only modified by administrators.

- My Boards: You will see this area if you have created at least one board of your own. You can tell if you can create your own boards by the fact that *Create Board* is displayed in the drop-down list at the top.

- Published boards: You can see this area if at least one other user has created their own board and shared it with you or published it for all users.

Whether you can additionally share or publish your own boards depends on your permission.

Grid

When you edit a board, the page is displayed in a grid.
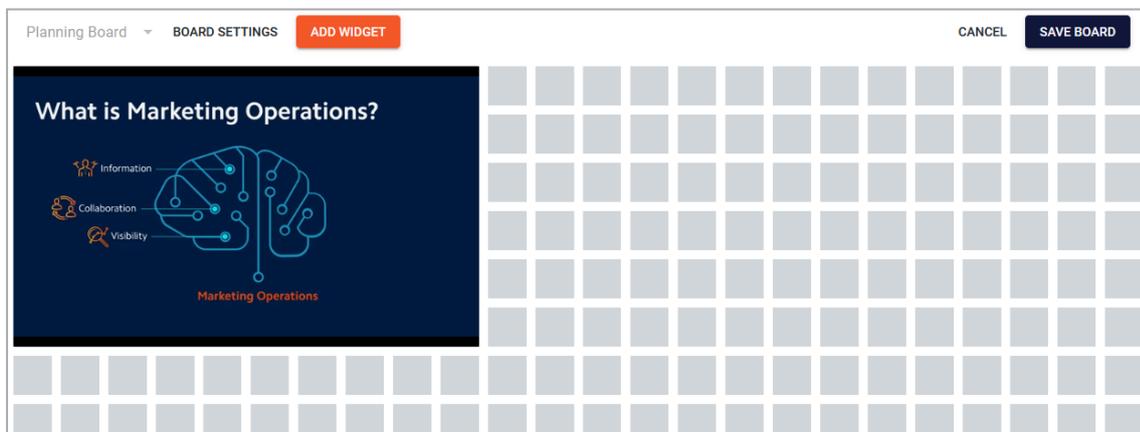
The grid divides the page horizontally into 24 segments. Vertically, the page can be any length. The grid determines in which size and position an element of the page is displayed. The elements are inserted as so-called widgets. Note that the grid behaves dynamically: When the browser window is reduced or enlarged, or the side-bar is displayed, the horizontal division is adjusted so that the division into 24 segments is preserved.

Widgets

Widgets are elements that you can insert on a board. The following widgets are available:

- *Asset Carousel* on page 18: The carousel widget can be used to display several images as in one slider.

- *Link* on page 20: The link widget allows a board to link to other pages, for example, to other boards in the module or other modules that offer linkable content, for example, assets in the Media Pool.

- Link Carousel: The link carousel allows to provide multiple links in one carousel. Each link is represented by an image; the user opens the link by clicking on the image. The selection of the different links is done as with the asset carousel. The settings are the same as for the *Link* on page 20 widget.

- Placeholder: With the placeholder you design the positioning of the widgets by inserting white space on the board. Especially when automatic vertical alignment is enabled, you can use the placeholder to influence the design of the board. The widget has no settings. Position it and drag it to the desired size.

- *Reports* on page 23: The widget allows you to display reports in a dashboard.

- *Rich Text Editor* on page 24: Use this widget to insert information such as formatted text, images, tables and special characters into a board.

- *Search* on page 27: The widget enables a direct search query in the five modules *Media Pool* (*Assets*), *Marketing Data Hub*, *Job Manager* (*Jobs*), *Brand Templates* and *Shop*.

- *To Do List* on page 28: The *To-Do List* widget shows tasks and jobs of the user from the *Job Manager*.

- *Text* on page 30: The text widget is used to integrate simple text into the board, for example to group widgets. Widget texts can be included in multiple languages.

- *Twitter* on page 32: The Twitter widget allows the user to add the Twitter profile to the board.

- *Video* on page 37: With this widget, the user embeds a video from the Media Pool into the board.

- *YouTube* on page 39: With the YouTube widget, the user integrates a YouTube video into the board.

2.1 Structure

This section describes the structure of the module Dashboard.

Start in the Dashboard

When you call up the module for the first time, you will see the board list in the upper left corner. Select the board in the board list that you want to see.
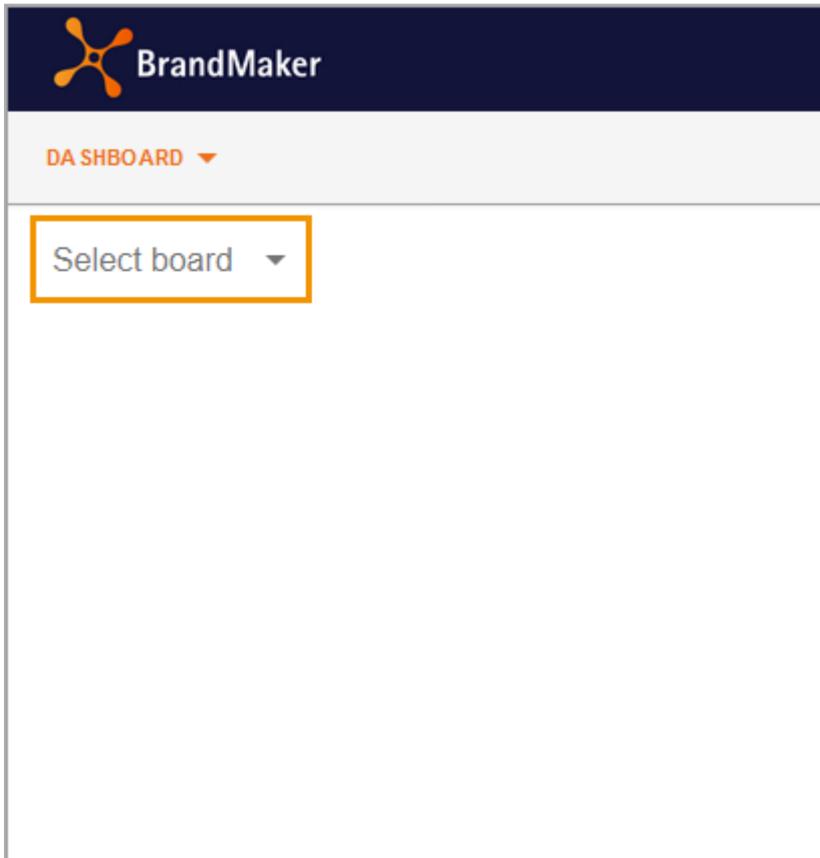
If you are authorized to create boards, the *Create board* button appears at the top of the list, see *Create board* on page 45.

Edit boards

When you edit a board, a gear icon appears in the upper right corner of the module. When you click the gear icon, a menu opens. In the menu you can choose between the *Edit board* on page 47, *Copy board* on page 46 and *Delete board* on page 50 functions.
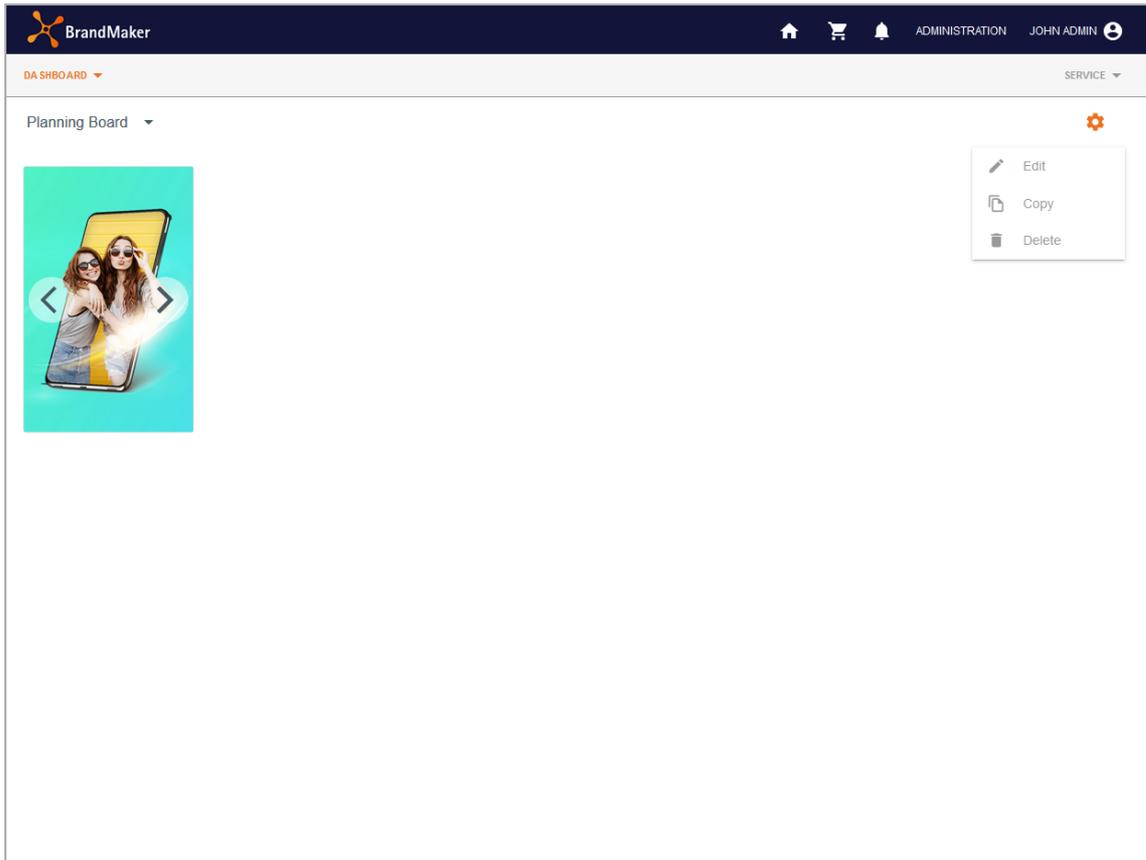
Sidebar

Once you have set a board to edit mode, you can edit the board settings and add widgets. When you click *Add widget*, the list of available widgets will appear on the right.
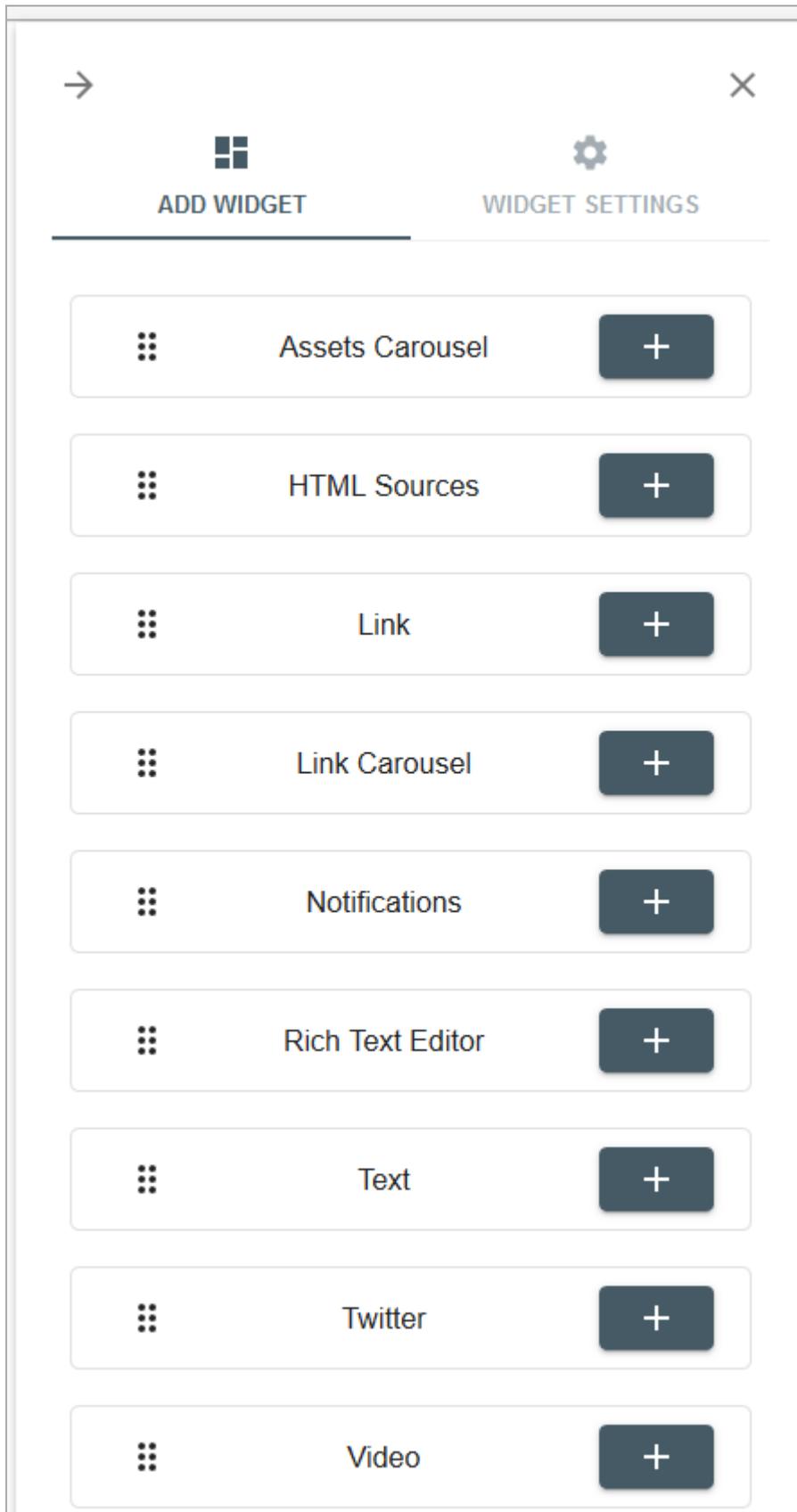
Click the plus sign to insert a widget. The widget will be positioned automatically.
You have the option to change the position on the board.
When you edit the settings of a widget, the second tab of the sidebar is displayed.

2.2 Asset Carousel

The *asset carousel* widget can be used to display several images in one slider.
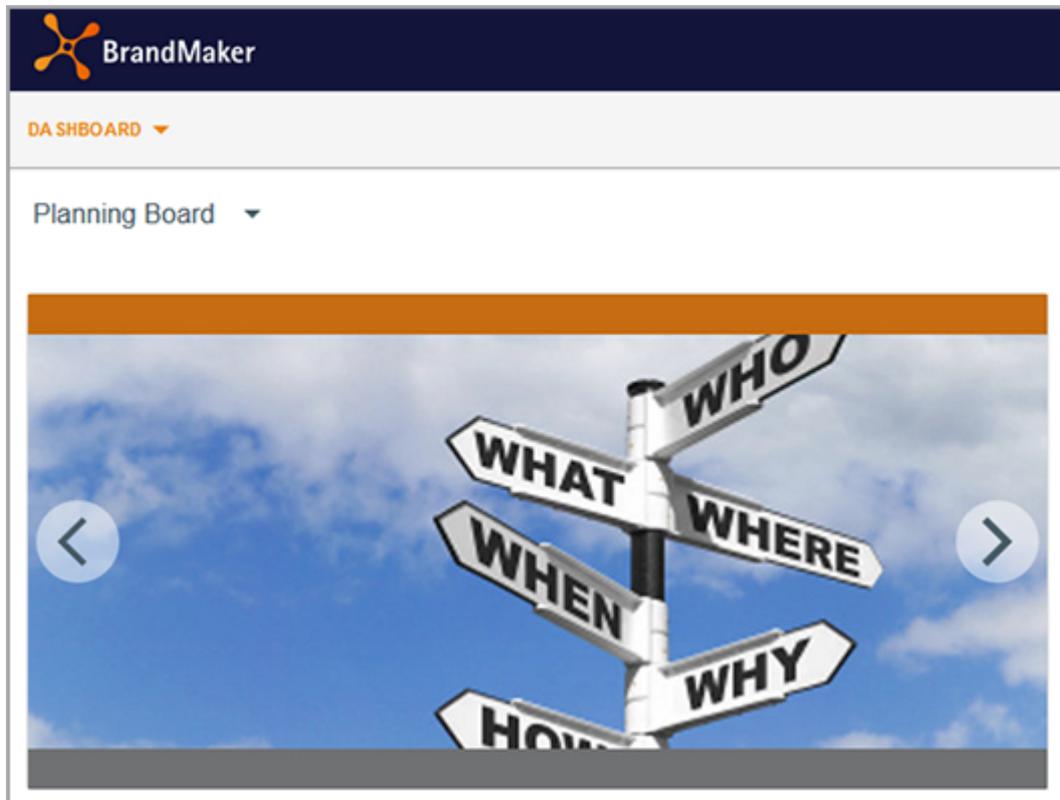
The images must be created as assets in the *Media Pool* module. The images are displayed in the widget with maximum size without white space and without distortion.

> **Note**
>
> You can use the widget only if your role has the necessary access rights to the Media Pool module. For users without the required access rights, a note is displayed.

Setting	Description
Display full-screen button	If you select the checkbox, users can view the carousel images in fullscreen. Then the images will be displayed in the widget. Note: You will only open the image on which you clicked the button. You cannot view the carousel in fullscreen mode.

Setting	Description
Hide thumbnails	If this checkbox is disabled, thumbnails of all images are displayed at the bottom of the widget. The viewer can click on the thumbnails to access the images directly. If the checkbox is enabled, no thumbnails are displayed.
Details button	If the checkbox is enabled, the widget displays the *To Asset Details* button on mouse-over. Clicking the button opens the detailed view of the asset.
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.

2.3   Link

The link widget allows a board to link to other pages, for example, to other boards in the module or other modules that offer linkable content, for example, assets in the Media Pool.
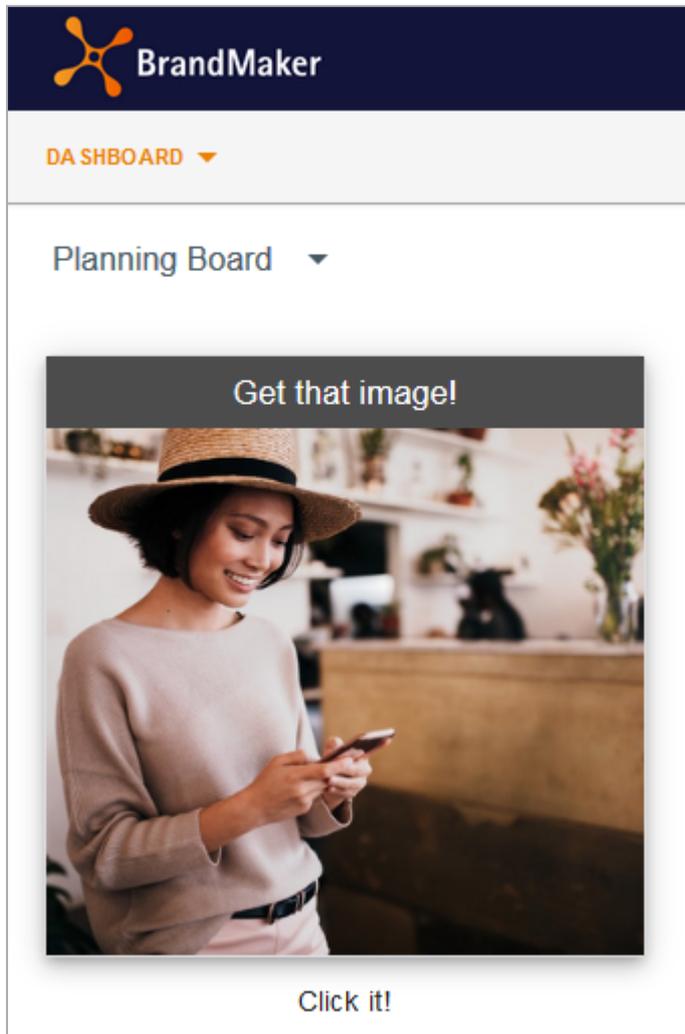
The link is represented by an image from the Media Pool, and a descriptive link text must also be entered (here: Get that image!)

Settings	Description	Mandatory?
Link	Enter in the field what should be triggered when you click on the widget. You have the following option: • `URL`: The URL is called. If the link starts with the / character, this is interpreted as an internal link within the system. • `mailto:name@domain.com`: The entry opens a new e-mail draft to the recipient preset in the widget in the local e-mail client. Subject, CC, BCC and Body are available as additional optional para-meters. Example with pre-filled subject: mailto:-john@public.com?subject=Urgent • `tel:+xxxxxxxxx`The entry starts a call via tele-phony software to the number +xxxxxxx. • `skype:profile_name`: The entry calls the Skype Name. • `callto:userid@domain.com`: The entry starts a call that can be made with Microsoft Teams, for example.	Yes
Open in	Choose where the target of the link is displayed: • *Current Tab*: The destination is displayed in the same tab. • *Popover*: The destination is displayed in a popover to the browser. • *New Tab*: The destination is displayed in a new browser tab. • *New Window*: The destination is displayed in a new browser tab.	
Link text	Enter a text that will be displayed with the image.	Yes
Alignment	Specify whether the link text is displayed at the top or bottom of the image.	—
Position to image	Specify whether the link text is placed over the image or displayed outside the image boundaries.	—

Settings	Description	Mandatory?
Labeling back-ground	Set the link text to be transparent, dark or light back-ground.	—
Labeling color	Set whether the link text will be displayed in white or black.	—
Text size	Set the size of the link text. To do this, select an entry from the drop-down list.	—
Additional text	Enter additional text and translate the text if necessary. The text is displayed below the image, in the screenshot example *Click it!*.	—
image	Select an image in the Media Pool that represents the link	Yes
Image description	Enter a description for the image. The description is mainly for the information of other users and will not be displayed on the board.	—
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

2.4 Reports

The widget allows you to display reports in a dashboard. Different reports are available for the Planner and Jobs.

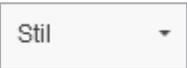| Settings	Description	Mandatory?
Workbook	Specify whether you want to display data on jobs (Job Manager) or from Planner.	Yes
View	Legen Sie die dargestellten Daten fest. Bei jeder Ansicht können Sie nach bestimmten Werten filtern. Workbook *Job Manager*: • *Jobs*:Data on jobs such as status, agent, types workflow and workflow steps. • *Workflows*: Status of workflows, assignees and their organizational units. • *Job Details*: List of jobs • *Task Details*: List of tasks • *Workflow Details*: List of workflows Workbook *Marketing Planner*: • *Spend Distribution*: Comparison of planned budgets and actual costs • *Invoice Details*: Invoice data • *PO Details*: Order data	Yes
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

2.5   Rich Text Editor

Use this widget to insert information such as formatted text, images, tables and special characters into a board. Note that you cannot enter the information in multiple languages. The widget provides the following functions:

Settings	Description
B	Bold
I	Italic
S	Strikethrough
Stil	Apply a style to selected text.
Normal	Apply a paragraph style to the block where the cursor is placed.
Quellcode	Display content as source code.
I_x	You remove bold markup, italics, and strikethroughs in a selected text.
	Numbered list
	Unnumbered list
	Reduce indent
	Increase indent
"	You mark the block where the cursor is placed as a quote.
Ω	You open the *Select special characters* dialog. Click on the desired special character. The special character is inserted at the cursor position.
	You insert a horizontal line as a separator at the cursor position.

Settings	Description
⊞	You insert a table at the cursor position. A dialog opens where you edit the following table properties: • *Row*: Enter the number of rows. • *Column*: Specify the number of columns. • *Width*: Specify what percentage the table should fill the width of the widget. • *Height*: Specify what percentage the table should fill the height of the widget. • *Header:*: Choose whether the first column, the first row, or both are designated as header elements. In header rows and columns, text is marked bold. • *Frame size*: Set the thickness of the frame. • *Alignment*: Set the alignment of the content in the header columns and rows. • *Outside cell spacing*: Set the spacing between the cells. • *Inside cell spacing*: Set the distance between the frame and the content of a cell. • *Heading*: Enter a heading. • *Table of contents*: currently without function. Click *OK* to insert the table. If you want to edit a table, perform a right-click on the table and select the desired function in the context menu.
🖼	You paste an image.
✂	Cut (CTRL + X)
⧉	Copy (CTRL + C)
📋	Paste (CTRL + V)
📋	Paste as plain text without formatting (CTRL + SHIFT + V)
← →	Undo/Redo

Settings	Description
ABC ▾	Activate the spell checker if needed. In the menu you can reach the options such as languages or dictionaries.
🔗	Insert or edit link; you can set up links that point to a URL, to an anchor in the page, that trigger sending an email or a phone call.
🔗✕	Remove link
⚑	Insert/edit anchor

The following settings are available for the widget:

Settings	Description	Mandatory?
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

2.6 Search

The widget enables a direct search query in the five modules *Media Pool* (*Assets*), *Marketing Data Hub*, *Job Manager* (*Jobs*), *Brand Templates* and *Shop*.

Settings	Description	Mandatory?
Name	Enter a name for the search. You can enter the name in multiple languages.	—
Initial statement in the input field	Enter an initial statement for the searching user. The instruction is displayed in the search field until keywords are entered. Enter the instruction in multiple languages if necessary.	—
Selectable modules	Select the modules that should be searchable with the search. If you activate several modules, a list is displayed next to the search field with which one module each can be selected for a search.	Yes
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

2.7 To Do List

The *To-Do List* widget shows tasks and jobs of the user from the *Job Manager*.
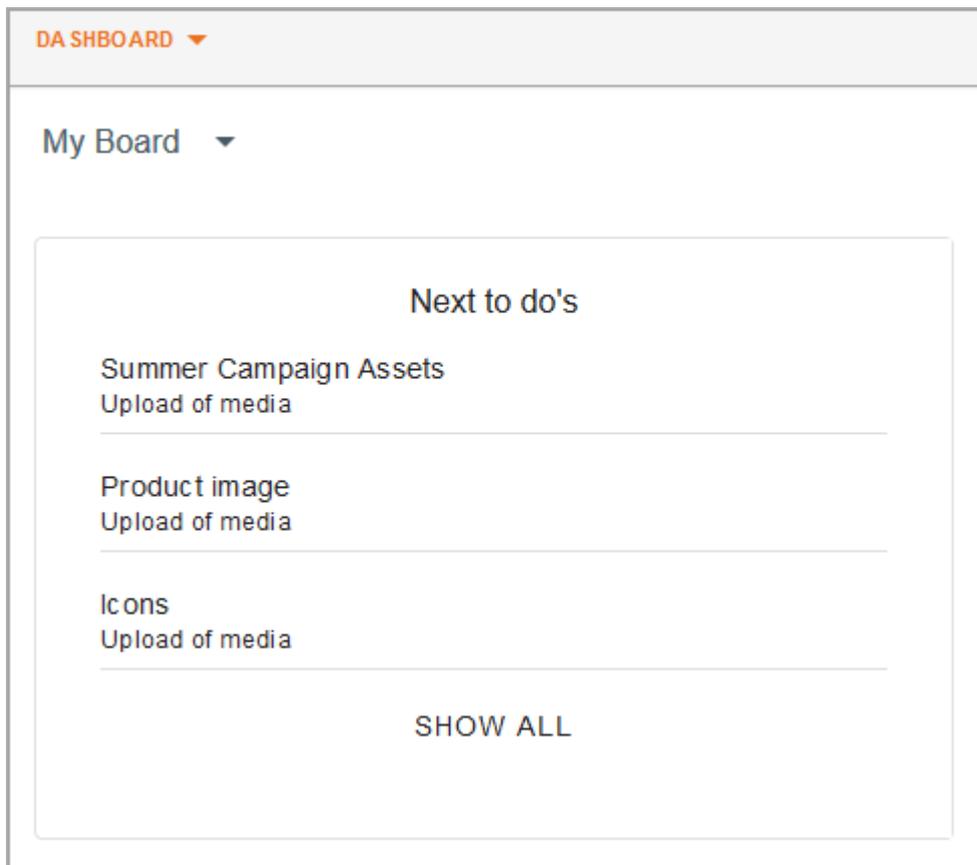
The user defines how many to-dos are displayed. In addition, the associated data sheets of the jobs can be opened and edited. Via *Show all* the dashboard of the Job Manager module is called up.

> **Note**
>
> You can use the widget only if your role has the necessary access rights to the *Job Manager* module. A notice is displayed for users without the required access rights.

Settings	Description	Mandatory?
Message limit	Set how many jobs and tasks are displayed in the widget.	—

| Settings	Description	Mandatory?
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

2.8 Text

The text widget is used to integrate simple text into the board, for example to group widgets. Widget texts can be included in multiple languages.
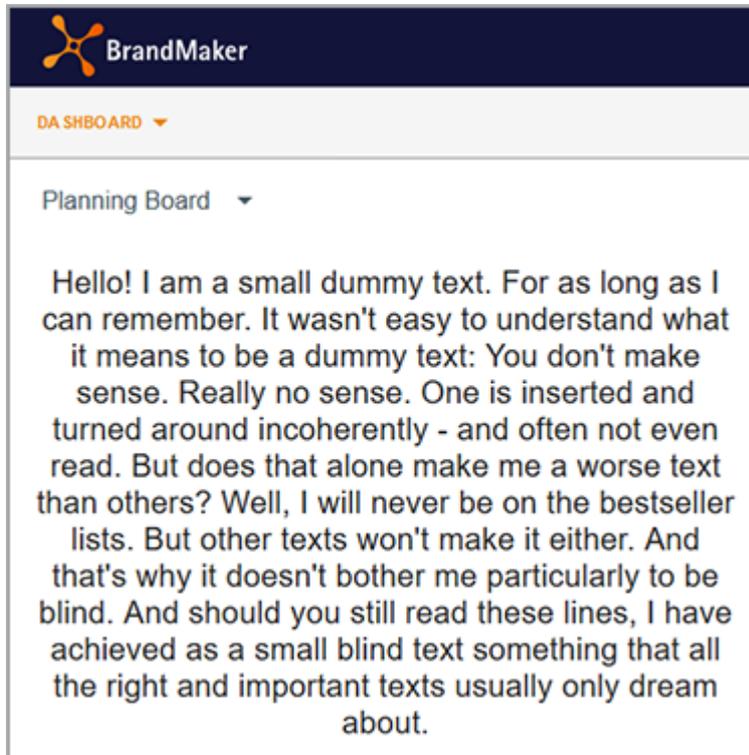
Settings	Description	Mandatory?
Text	Enter the text. Click the globe icon to enter the text in multiple languages.	Yes
Horizontal alignment:	Choose whether the text is aligned left, center, or right.	—
Vertical alignment:	Choose whether the text is vertically aligned top, center, or bottom.	—
Text markup:	Make the text bold or italic, or put an underscore.	—
Size	Choose one of the preset font sizes.	—

Settings	Description	Mandatory?
Color	Set the text color. Click the palette icon to open the corresponding dialog. Enter either a hex or RGB value or select a color with the color picker. White (RGBA: 255,255,255,1) removes the text. The alpha value is always 1 or 100%, so no transparency can be set.	—
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

2.9 Twitter

For example, you can use the Twitter widget to add a Twitter profile to the board. First, select the Twitter source. Since the parameters of the sources differ significantly, the parameters for each source are described separately below.

Source types *Profile* and *Likes*

Settings	Description	Mandatory?
Screen name	Enter the name of the Twitter handle as a string. Note that the Twitter handle must not be preceded by an "@".	—
User ID	Enter the number of the Twitter handle as a number.	—
Automatic value	Decide whether the profile will be automatically adjusted to the widget.	—
Theme	Decide whether the profile will be displayed in a light or dark design.	—
Link color	Choose a color for the links.	—
Edge color	Select an edge color.	—
No header	Decide whether to hide the header.	—
No footer	Decide whether to hide the footer.	—
No edge	Decide whether to hide the edges.	—
No scrollbar	Decide whether to hide the scrollbar.	—
Transparent	Decide whether the profile is displayed transparently.	—
Language	Enter in which language the interface elements are displayed. Use these language codes.	—
Placeholder	Enter a text that will be displayed as a placeholder while the tweet is loading.	—

Settings	Description	Mandatory?
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

Source type *List*

Settings	Description	Mandatory?
Screen name of the owner	Note To correctly address the *List* type, enter either *Owner's screen name* and *Slug* or alternatively the *List ID*. Enter the name of the owner's Twitter handle as a string.	—
Slug	Note To correctly address the *List* type, enter either *Owner's screen name* and *Slug* or alternatively the *List ID*. Enter the name of the slug of the Twitter handle. Replace spaces with a hyphen: For the *Political Twitter* list, the correct entry is therefore *Political-Twitter*.	—
List ID	Note To correctly address the *List* type, enter either *Owner's screen name* and *Slug* or alternatively the *List ID*. Enter the number of the Twitter handle as a number.	—
Automatic value	Decide whether the profile will be automatically adjusted to the widget.	—
Theme	Decide whether the profile will be displayed in a light or dark design.	—
Link color	Choose a color for the links.	—

Settings	Description	Mandatory?
Edge color	Select an edge color.	—
No header	Decide whether to hide the header.	—
No footer	Decide whether to hide the footer.	—
No edge	Decide whether to hide the edges.	—
No scrollbar	Decide whether to hide the scrollbar.	—
Transparent	Decide whether the profile is displayed transparently.	—
Language	Enter in which language the interface elements are displayed. Use these language codes.	—
Placeholder	Enter a text that will be displayed as a placeholder while the tweet is loading.	—
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

Source typeCollection

Settings	Description	Mandatory?
ID	Enter the ID of the collection.	Yes
Automatic value	Decide whether the profile will be automatically adjusted to the widget.	—
Theme	Decide whether the profile will be displayed in a light or dark design.	—
Link color	Choose a color for the links.	—
Edge color	Select an edge color.	—
No header	Decide whether to hide the header.	—
No footer	Decide whether to hide the footer.	—

Settings	Description	Mandatory?
No edge	Decide whether to hide the edges.	—
No scrollbar	Decide whether to hide the scrollbar.	—
Transparent	Decide whether the profile is displayed transparently.	—
Language	Enter in which language the interface elements are displayed. Use these language codes.	—
Placeholder	Enter a text that will be displayed as a placeholder while the tweet is loading.	—
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

Source type *URL*

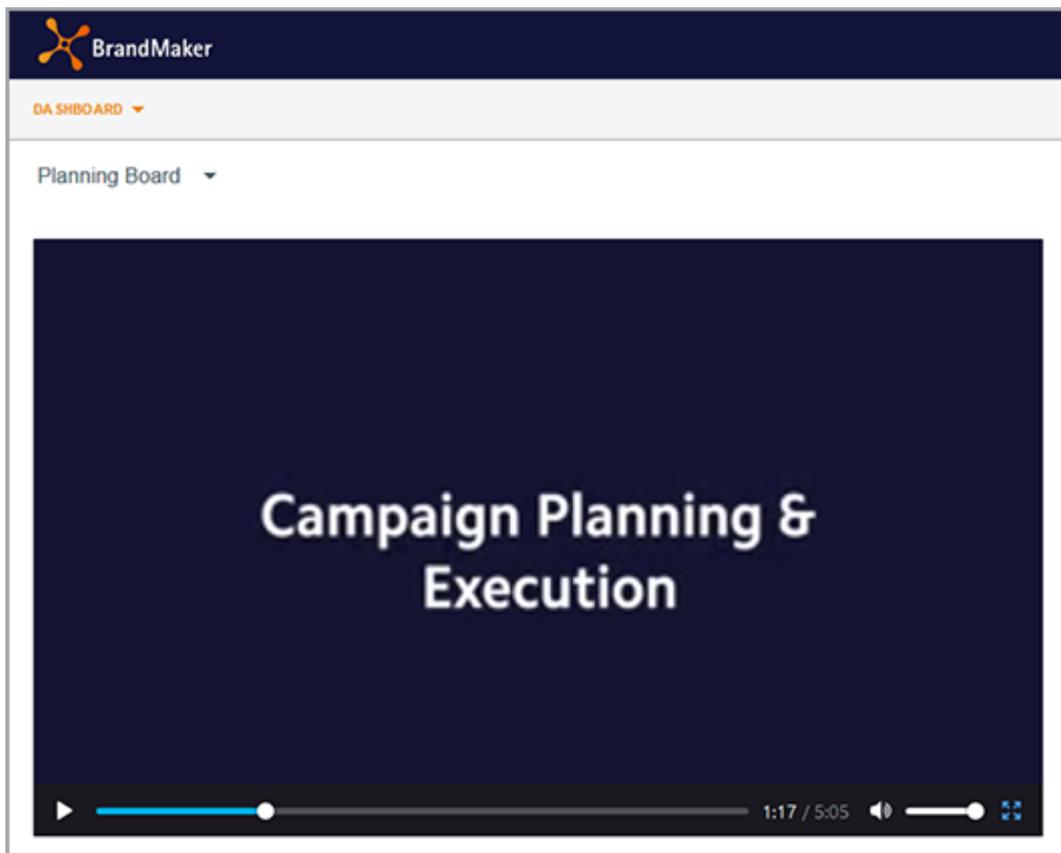| Settings	Description	Mandatory?
URL	Enter the URL.	Yes
Automatic value	Decide whether the profile will be automatically adjusted to the widget.	—
Theme	Decide whether the profile will be displayed in a light or dark design.	—
Link color	Choose a color for the links.	—
Edge color	Select an edge color.	—
No header	Decide whether to hide the header.	—
No footer	Decide whether to hide the footer.	—
No edge	Decide whether to hide the edge.	—
No scrollbar	Decide whether to hide the scrollbar.	—
Transparent	Decide whether the profile is displayed transparently.	—
Language	Enter in which language the interface elements are displayed. Use these language codes.	—

Settings	Description	Mandatory?
Placeholder	Enter a text that will be displayed as a placeholder while the tweet is loading.	—
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

Source type *Tweet*

Settings	Description	Mandatory?
Tweet ID	Enter the ID of the Tweet.	Yes
Theme	Decide whether the profile will be displayed in a light or dark design.	—
Link color	Choose a color for the links.	—
Edge color	Select an edge color.	—
Language	Enter in which language the interface elements are displayed. Use these language codes.	—
Placeholder	Enter a text that will be displayed as a placeholder while the tweet is loading.	—
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

2.10   Video

With this widget, the user embeds a video from the Media Pool into the board.

Settings	Description	Mandatory?
Video	Select the video in the Media Pool that will be displayed in the widget.	Yes
Autoplay	Check the checkbox if you want the video to play automatically on page view. Uncheck the checkbox if you want the viewer to click to play the video.	—
Control	Select whether the control is displayed. Note that the Play button is also no longer displayed. Therefore, disabling it only makes sense if the *Autoplay* function is enabled.	—
Loop	Select whether the video will be played in a continuous loop.	—

Settings	Description	Mandatory?
Mute	Select whether the sound should be turned on during playback. If the control is enabled when the sound is off, the viewer can increase the sound again.	—
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

2.11 YouTube

With the YouTube widget, the user integrates a YouTube video into the board.
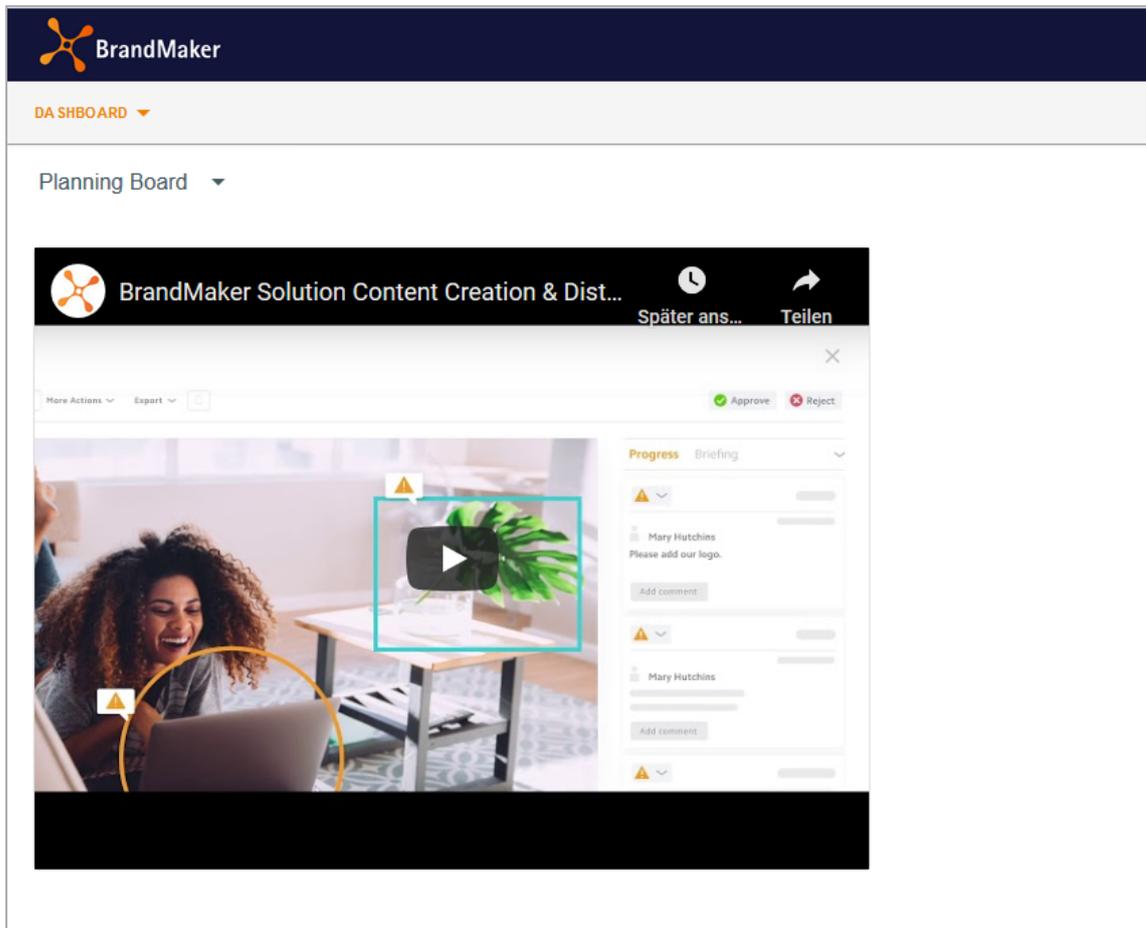
Settings	Description	Mandatory?
Link	Enter the link to the video.	Yes
Width	Enter the width at which the video will be displayed. If you enter a numerical value, this is interpreted as a pixel value. If you enter the % sign after the number, the value is interpreted as a percentage.	No
Height	Enter the height at which the video will be displayed. If you enter a numerical value, this is interpreted as a pixel value. If you enter the % sign after the number, the value is interpreted as a percentage.	No
Autoplay	Check the checkbox if you want the video to play automatically on page view. Uncheck the checkbox if you want the viewer to click to play the video.	—

Settings	Description	Mandatory?
Captions	Select the checkbox to display any possible subtitles that may be present.	
Color	Choose the color of the video progress bar.	—
Control	Select whether the control is displayed. Note that the Play button is also no longer displayed. Therefore, disabling it only makes sense if the *Autoplay* function is enabled.	—
Disable keyboard control	Select whether the video can be controlled by keyboard.	—
Enable JS API	If required, enable the control via JS API. If you enable the setting, the player can be controlled using IFrame calls. For more information about the IFrame API and how to use it, see the IFrame API docu-mentation.	—
Fullscreen	Select whether the video can be play in fullscreen mode.	—
User interface language	Enter in which language the control tooltips are displayed. Use two-letter language codes according to ISO 636-1, e.g. *en* or *de*.	—
List type	If you want to offer the user more detailed videos, choose how you want to compile the detailed videos in the drop-down list. Then enter the appropriate value in the *List* field.	—
List	Note: Only visible if *Playlist*, *Search*, *User Uploads* is set as the list type. Enter the required date for the selected list type: • Playlist: YouTube Playlist ID, e.g. PLE6JUROnU5X5vYs5yyVl6A1-LKTmBI3i7 • Search: Search request • User uploads: YouTube channel	Yes
Loop	Select whether the video is played in a continuous loop.	—

Settings	Description	Mandatory?
Hide YouTube logo	Select whether the YouTube logo is displayed in the widget.	—
Diagram	Decide whether videos should play on an HTML5 player on iOS inline or in full-screen mode.	—
Start	If you do not want to show the video from the beginning, enter the start time in this field as an integer value in seconds: If you want the playback to start at 1:35, enter the value *95*.	—
End	In this field, enter the time (integer, in seconds) at which the video will stop playing: If you want the playback to end at 2:35 AM, enter the value 155. Note: This value always refers to the absolute start of the video, not to a possibly entered start time.	—
Display: Border Color	Set the border color for the widget. Click the palette icon to open the corresponding dialog. Enter either a hex or RGBA value or choose a color with the color picker. White (RGBA: 255,255,255,1) or an alpha value of 0 makes the border invisible.	—

Boards

3

This section explains how to handle boards on the Dashboard. This includes the following tasks:

3.1 Create board

1. Click > Dashboard.

2. Click in board list *Create board*.

   The *Create board* dialog box appears.

3. Enter a name for the board. Click on the globe icon if you want to enter the name language-dependent.

4. Optional: Edit the access rights. For more information, see the sections *Publish board* on page 48 and *Share board* on page 49.

5. Optional: If you want to create an administrator board, select the *Only editable by administrators* checkbox.

6. Optional: If you want widgets to be automatically positioned upwards on previously free spaces, activate the Align vertically checkbox. Note that this does not change the horizontal alignment of a widget, but only moves the widget vertically upwards, either until it touches another widget on at least one grid element or until it reaches the top board border.

7. Click *Save board*.

You have created the board. The board is displayed in edit mode, i.e., the grid is displayed and you can *Add widget* on page 53

3.2 Copy board

1. Click > Dashboard.

2. Select the board in the board list that you want to copy.

   The board appears.

3. Click the gear icon in the upper right corner and then in the *Copy* menu that appears.

   The *Create board* dialog box appears.

4. Enter a name for the board. Click on the globe icon if you want to enter the name language-dependent.

5. Optional: Edit the access rights. For more information, see the sections *Publish board* on page 48 and *Share board* on page 49.

6. Optional: Edit the *Only editable by administrators* checkbox.

7. Optional: Edit the *Align vertically* checkbox.

8. Click *Copy board*.

You have copied the board. The board is displayed in edit mode, i.e., the grid is displayed and you can add a widget, see *Widgets* on page 51.

3.3   Edit board

1. Click > Dashboard.

2. Select the board in the board list that you want to edit.

   The board appears.

3. Click the gear icon in the upper right corner and then in the *Edit* menu that appears.

   The board is displayed in the edit mode.

4. Optional: Edit the settings of the board:

   a. Click *Board settings*.

      The *Update board* dialog box appears.

   b. Edit the name, access rights, the *Only editable by administrators* check-box or the *Align vertically* checkbox as needed.

   c. Click *Save board*.

      You have edited the board settings.

5. Optional: Edit the widgets. For more information, see *Widgets* on page 51 chapter.

6. Save any changes to the widgets by clicking *Save board* in the upper right corner.

7. Click *Cancel*.

You have edited the board.

3.4 Publish board

Note that a published board is available to all users of module Dashboard.

Prerequisite

You have the necessary rights to publish a board. For more information, see the *Administration* on page 61 chapter.

1. Click > Dashboard.

2. Select the board in the board list that you want to publish.

   The board appears.

3. Click the gear icon in the upper right corner and then in the *Edit* menu that appears.

   The board is displayed in the edit mode.

4. Click *Board settings*.

   The *Update board* dialog box appears.

5. Select the checkbox *Visible to all users*.

6. Click *Save board*.

7. Click *Cancel*.

You have published the board.

3.5 Share board

Note that a shared board is available to a group of module users. You can compose the group as follows:

- Users: You can directly select one or more users.

- VDB groups: You share the board with users who have access to the selected VDB group.

- Roles: You share the board with users who have been assigned a role in the system.

- Organizational unit: You share the board with users who are assigned to an organizational unit.

Of course, you can also combine this selection and, for example, select two organizational units and three users directly.

Prerequisite

You have the necessary rights to share a board. For more information, see the *Administration* on page 61 chapter.

1. Click > Dashboard.

2. Select the board in the board list that you want to share.

   The board appears.

3. Click the gear icon in the upper right corner and then in the *Edit* menu that appears.

   The board is displayed in the edit mode.

4. Click *Board settings*.

   The *Update board* dialog box appears.

5. In the *Access Rights* area, select the users who you want to share the board with:

   a. Click the desired drop-down list.

   b. In the list that appears, select the roles, organizational units, or users.

   c. If you do not see the options you want, click *Show more...* at the end of the list or enter a keyword in the search field.

6. Click *Save board*.

7. Click *Cancel*.

You have shared the board.

3.6   Delete board

> **Attention!**
>
> You cannot undo the deletion of a board. All associated data is permanently deleted.

1. Click > Dashboard.

2. Select the board in the board list that you want to delete.

   The board appears.

3. Click the gear icon in the upper right corner and then in the *Delete* menu that appears.

   A confirmation prompt is displayed.

4. Click *Confirm*.

The board is deleted.

Widgets

4

This section explains how to handle widgets on the Dashboard. This includes the following tasks:

4.1 Add widget

Prerequisite

You have opened the board to which you want to add a widget in edit mode, see *Create board* on page 45 or *Edit board* on page 47.

1. Click *Add widget*.

   The list of available widgets appears on the right.

2. Click the plus icon on the widget you want to add.

   The widget is added to the left side of the board. The settings of the widget are displayed on the right.

3. Edit at least the mandatory fields of the widget. For detailed information about the settings, see the *General information* on page 11 chapter.

4. Click *Save*.

5. Adjust the size of the widget:
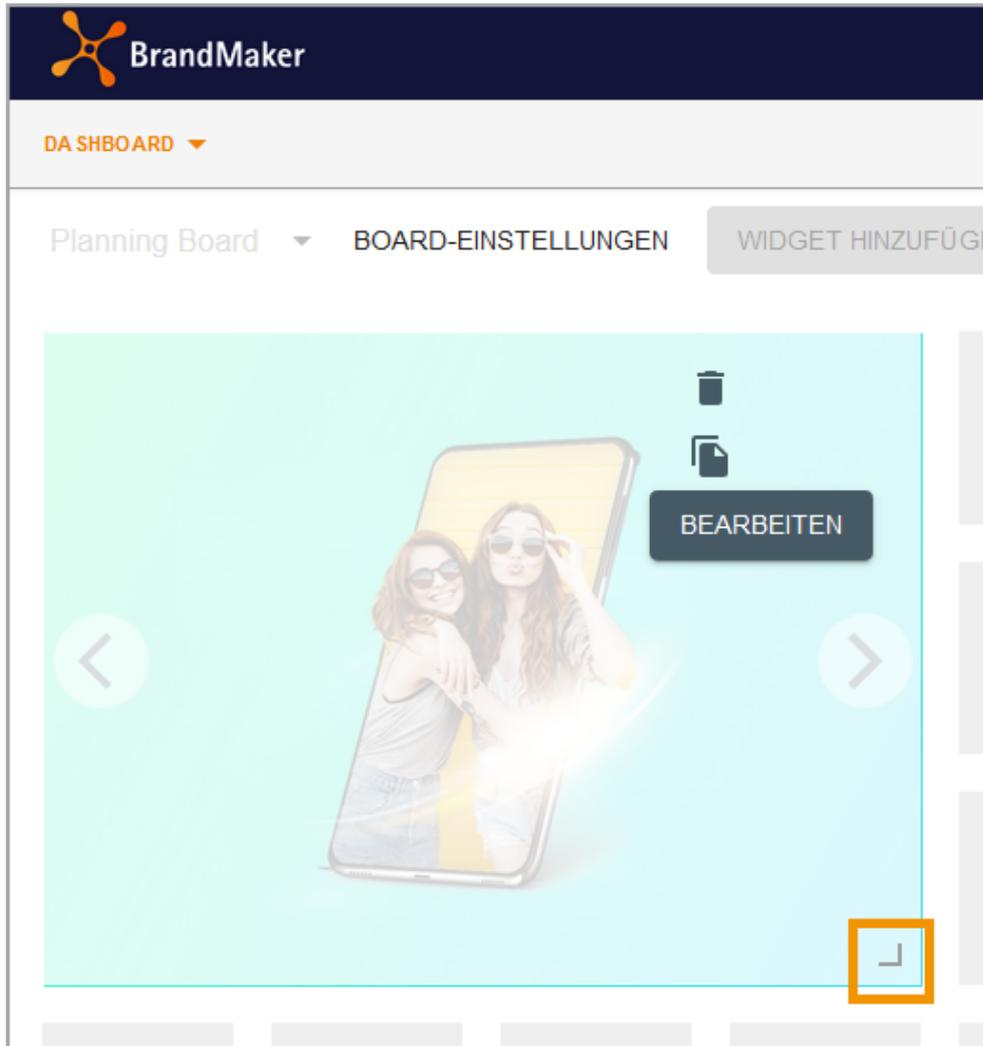
    a. Place the cursor on the bottom right corner in the widget:

    b. Click on the frame icon and hold down the mouse button.

    c. Now drag the widget to the required size. Note that changes are only possible according to the grid.

    d. Release the mouse button.

      You have adjusted the widget size.

6. Position the widget:

    a. Place the cursor on the widget so that the cursor is displayed as a cross.

    b. Click on the widget and hold down the mouse button.

    c. Now drag the widget to the desired position. Note that changes are only possible according to the grid.

d. Release the mouse button.

You have positioned the widget.

7. Click *Save board*.

You have added a widget to the board.

Positioning a widget directly

To position a widget directly when inserting it, place the cursor on the drag point to the left of the widget in the widget list. Drag-and-drop the widget onto the board to the desired location. Then adjust the size and edit the settings of the widget.
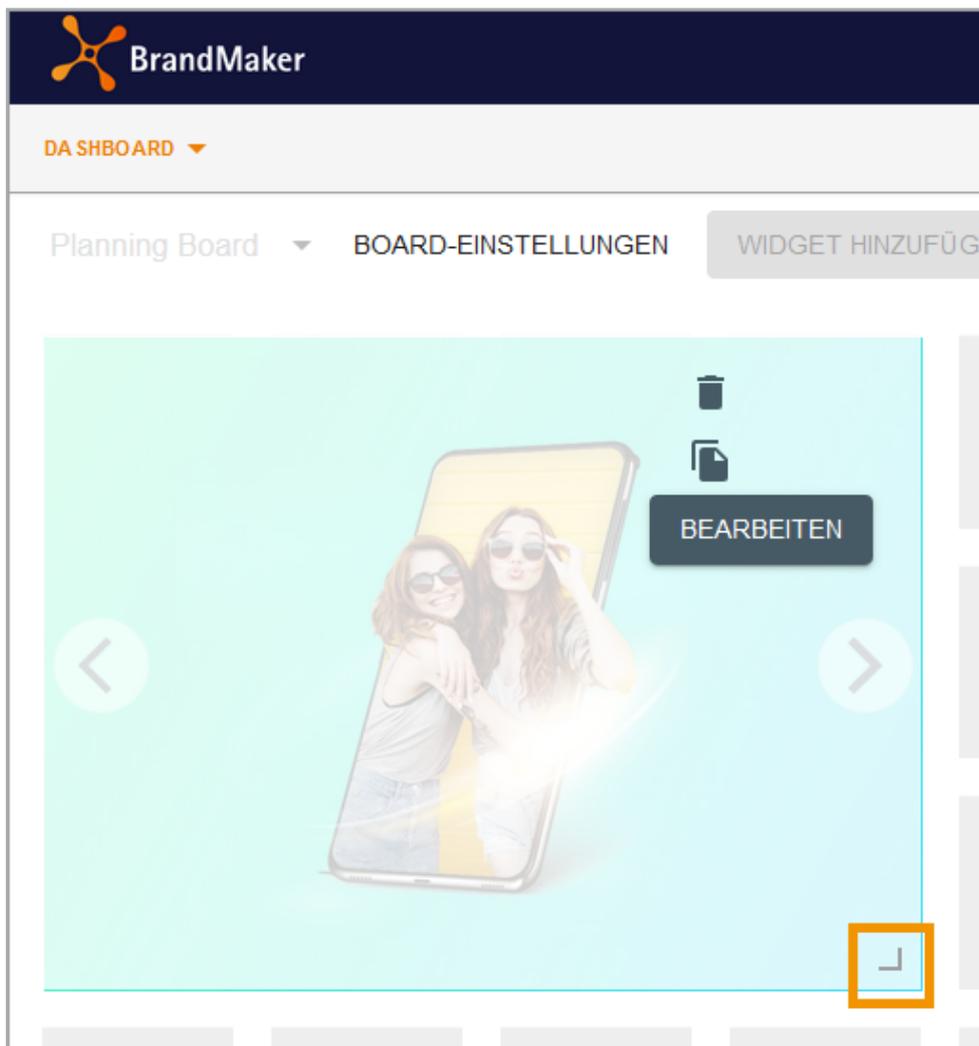
4.2   Edit widget

Prerequisite

You have opened the board whose widget you want to edit in edit mode, see *Edit board* on page 47.

1. Move the cursor to the widget and click *Edit*.

    The settings of the widget are displayed on the right.

2. Optional: Edit the settings of the widget. For detailed information about the settings, see the *General information* on page 11 chapter.

3. Click *Save*.

4. Optional: If necessary, adjust the size of the widget:

    a. Place the cursor on the bottom right corner in the widget:

    b. Click on the frame icon and hold down the mouse button.

    c. Now drag the widget to the required size. Note that changes are only possible according to the grid.

    d. Release the mouse button.

        You have adjusted the widget size.

5. Optional: Position the widget:

    a. Place the cursor on the widget so that the cursor is displayed as a cross.

    b. Click on the widget and hold down the mouse button.

    c. Now drag the widget to the desired position. Note that changes are only possible according to the grid.

    d. Release the mouse button.

        You have positioned the widget.

6. Click *Save board*.
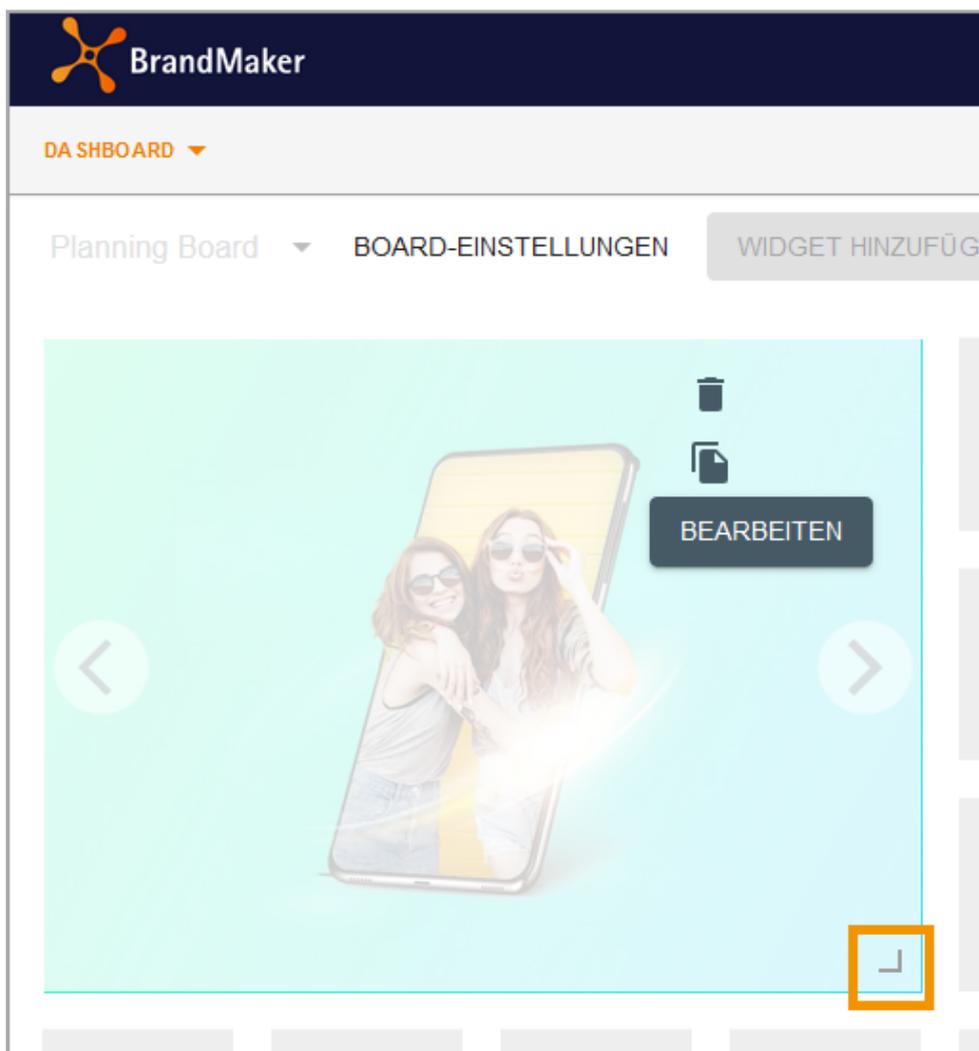
You have edited the widget.

4.3 Copy widget

Prerequisite

You have opened the board whose widget you want to copy in edit mode, see *Edit board* on page 47.

1. Move the cursor to the widget and click *Copy*.

   The widget is inserted once again on the board. The settings of the newly inserted widget are displayed on the right.

2. Optional: Edit the settings of the widget. For detailed information about the settings, see the *General information* on page 11 chapter.

3. Click *Save*.

4. Optional: If necessary, adjust the size of the widget:

   a. Place the cursor on the bottom right corner in the widget:

  b. Click on the frame icon and hold down the mouse button.

  c. Now drag the widget to the required size. Note that changes are only possible according to the grid.

  d. Release the mouse button.

   You have adjusted the widget size.

5. Optional: Position the widget:

  a. Place the cursor on the widget so that the cursor is displayed as a cross.

  b. Click on the widget and hold down the mouse button.

  c. Now drag the widget to the desired position. Note that changes are only possible according to the grid.

  d. Release the mouse button.

   You have positioned the widget.

6. Click *Save board*.

You have copied the widget.

4.4   Delete widget

> Attention!
>
> You cannot undo the deletion of a widget. All associated data is permanently deleted.

Prerequisite

You have opened the board in which you want to delete a widget in edit mode, see *Edit board* on page 47.

1. Move the cursor to the widget and click the trash icon.

   A confirmation prompt is displayed.

2. Click *Confirm*.

The widget is deleted.

Administration 5

For the administration of the dashboard, you only need to create roles for the users as required. For information on how to create roles, see *Further documentation* on page 10in the Administration Manual.

Further settings are not necessary in the administration.

Basic rights

Right	Description
MODULE_ ACCESS	The user has access to the module and can see his or her own published or shared boards.
MANAGE_ OWN_ BOARDS	The user can create, edit, and delete his or her own boards. This also includes copying boards of other users. The copied board is created as a separate board.

The MODULE_ACCESS and MANAGE_OWN_BOARDS rights are basic rights, since both must be assigned to a role for an extension right to take effect.

Extension rights

> 📄 **Hint**
>
> To be able to use any of the following rights effectively for a role, the role must have the basic rights assigned to it.

Right	Description
MANAGE_ADMIN_ BOARDS	The user can create, edit, and delete additional administrator boards. This right should only be granted to administrators.
SHARE_OWN_ BOARDS	The user can share his or her own boards with other users.
PUBLISH_BOARDS	The user can publish his or her own boards thus making them available to all other dashboard users.
MANAGE_SHARED_ OWN_BOARDS	The user can edit additional boards which another user has created and then shared.