

# Jalapeno How To - Create a dashboard

## What is a dashboard?

A dashboard is a dynamic reporting tool that aggregates and displays key views (or *snapshots*) across Jalapeno in one page to enable users to view a state of business at a glance.

A snapshot is a saved configuration of a Jalapeno visualization, chart or grid. Snapshots are re-usable across multiple dashboards.

A dashboard is composed of tiles (or widgets) with each widget displaying an instance of a snapshot.

To learn more about how to create snapshots, view this [guide](#).

## Where can I create a dashboard in Jalapeno?

Dashboards can be accessed by navigating to Insights -> Dashboard.

A dashboard can be created by clicking on the 'New' button and adding a dashboard name and description.

### NOTE: Prerequisite to creating dashboards:

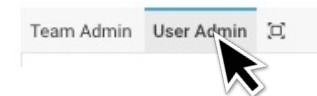
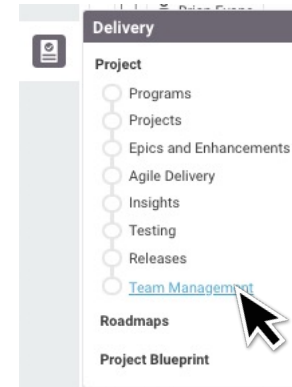
Users who will be viewing and/or creating dashboards must be configured in the model.

To configure users, go to;

Model Workbench > Delivery > Project > Team Management > User Admin


Create a row in the grid for each user. The following columns must be populated:

- Label** the name of the user as it will be shown in Jalapeno
- User Credentials** the user account of the user



## How do I populate my dashboards?

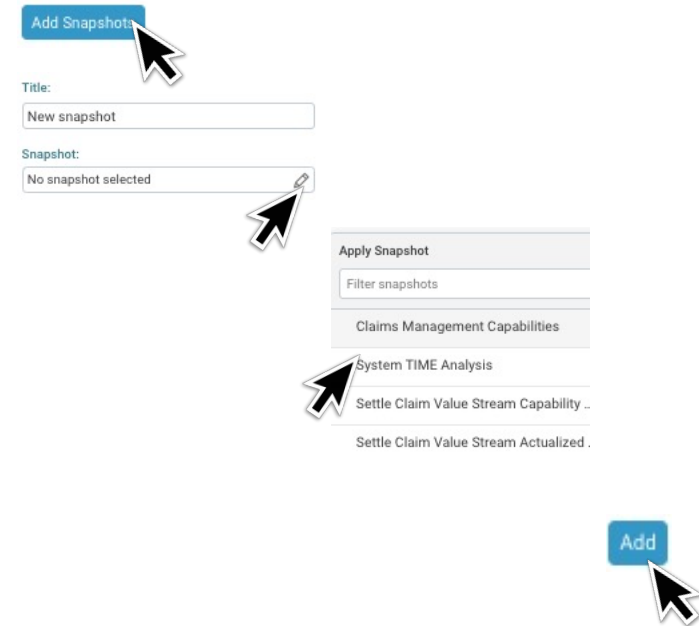
Select a dashboard and click on the 'Add Snapshots' button.

Add a title for the snapshot and click on the  icon to select from a list of previously created snapshots.


Click on a snapshot and see a preview in the view pane. Click on the Add button to add the snapshot onto a dashboard.

The dashboard view is updated dynamically to show all the snapshots within it.

To learn more about how to create snapshots, view this [guide](#).



## How do I manipulate an existing dashboard?

To manipulate the name and description of a dashboard, hover over the name of the dashboard and click on the  icon to open up the list of options. Clicking on the 'Edit' option allows you to edit the name and description of the dashboard.

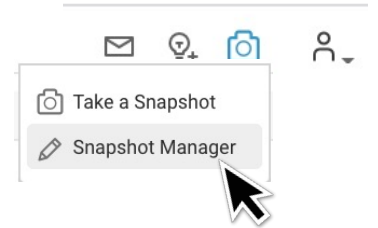
The snapshots within the dashboard can also be manipulated.

To better understand how to add and edit snapshots, view this [guide](#).

## What are the essential parts of a dashboard that need to be modelled?

There is very little in Jalapeno that is mandatory. You may model as little or as much as you like. However, snapshots need to be taken first, for them to be added into a dashboard.


To learn more about creating snapshots, view this [guide](#).




# Jalapeno How To - Create a dashboard


## How do I share my dashboard with others?

Until a dashboard is published, only the dashboard creator can view the dashboard.

To allow other Jalapeno users to view the dashboard you have created, click on the actions menu  against the dashboard to be published, then select the Publish option. Use the “+” button on the grid to create one row for each user who will need to view the dashboard.

## What other permissions can I grant to others for my dashboards?

In the Dashboard Manager, click on the actions menu  for the selected dashboard. Select the ‘Settings’ option.

The Dashboard settings dialog is displayed. The grid shown contains a row for each user who has permissions defined for the selected dashboard. (NOTE: the dashboard creator is not shown in the grid). Use the pencil icon  to edit a user’s permissions.

| Permission  | Description  |
|-------------|--|
| View        | The user can view the dashboard  |
| Publish     | The user is able to allow others to view the dashboard using the ‘Publish’ option                                    |
| Personalise | The user is able to clone the dashboard. Once a user clones a dashboard, they are the owner of the cloned dashboard. |
| Edit        | The user is able to edit the dashboard title, description, widgets, widget positions                                 |
| Delete      | The user is able to delete the dashboard including all widgets contained on the dashboard                            |
| Admin       | The user is able to assign user permissions for the dashboard  |

## If I create a dashboard, what permissions do I have for that dashboard?

If you create a dashboard, you are recorded as the dashboard Owner. The dashboard Owner has the Admin permission by default.

