Manual

Module Dashboards

Dashboard editing and access management

Parm AG · Bahnhofstrasse 31 · CH-8280 Kreuzlingen
Phone: +41 71 243 10 00 · info@parm.com · parm.com

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Dashboard editing and access management

User documentation for the **Dashboard** (BI) module in the myPARM desktop application (`myparm-ke`), covering two functions:

- Dashboard editing — designing and modifying dashboard content (Designer mode),
- Dashboard access — managing which roles have access to individual dashboards, and whether a dashboard is active.

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1. Access requirements

The Dashboard module is visible in the application only when all of the following conditions are met:

Condition	Description
BI licence	Dashboard functions (viewing, editing, access management) require an active `BI` licence. Without it, the dashboard menu entries and views are unavailable.
System configuration	The dashboard module can be switched on or off globally at the application configuration level (`isDashboardEnabled`). When it is switched off, opening a dashboard address redirects to the "Not found" page.
`CanAccessDashboard` access right	Required to open a dashboard in **view** mode (Viewer).
`CanMaintainDashboard` access right	Required to enter **edit** mode (Designer) and to open the **Dashboard access** screen.

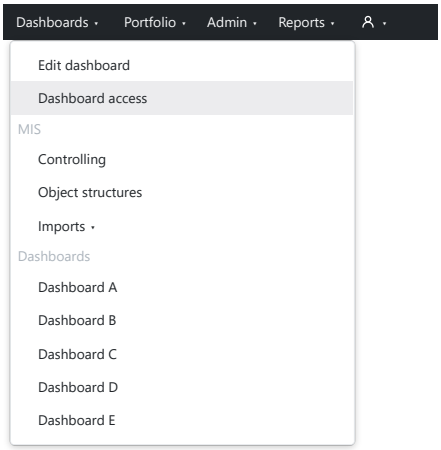
In addition, viewing a dashboard is subject to one more rule: the dashboard must be marked as Active (see 4. Dashboard access) — if it is not active, a user opening it in view mode is redirected to the "Not found" page, even if they hold the `CanAccessDashboard` right.

2. Navigation

Access to dashboards is found in the top navigation menu, under the **Dashboards** tab, which contains:

- **Edit dashboard** — opens a non-standard dashboard in edit mode. Visible only to users holding the `CanMaintainDashboard` right.
- **Dashboard access** — opens the list of all dashboards together with access management. Visible only to users holding the `CanMaintainDashboard` right.

- Further down, under the **Dashboards** heading, the same menu lists the dashboards you can open — clicking a name opens that dashboard in **view** mode.



3. Editing a dashboard — Designer mode

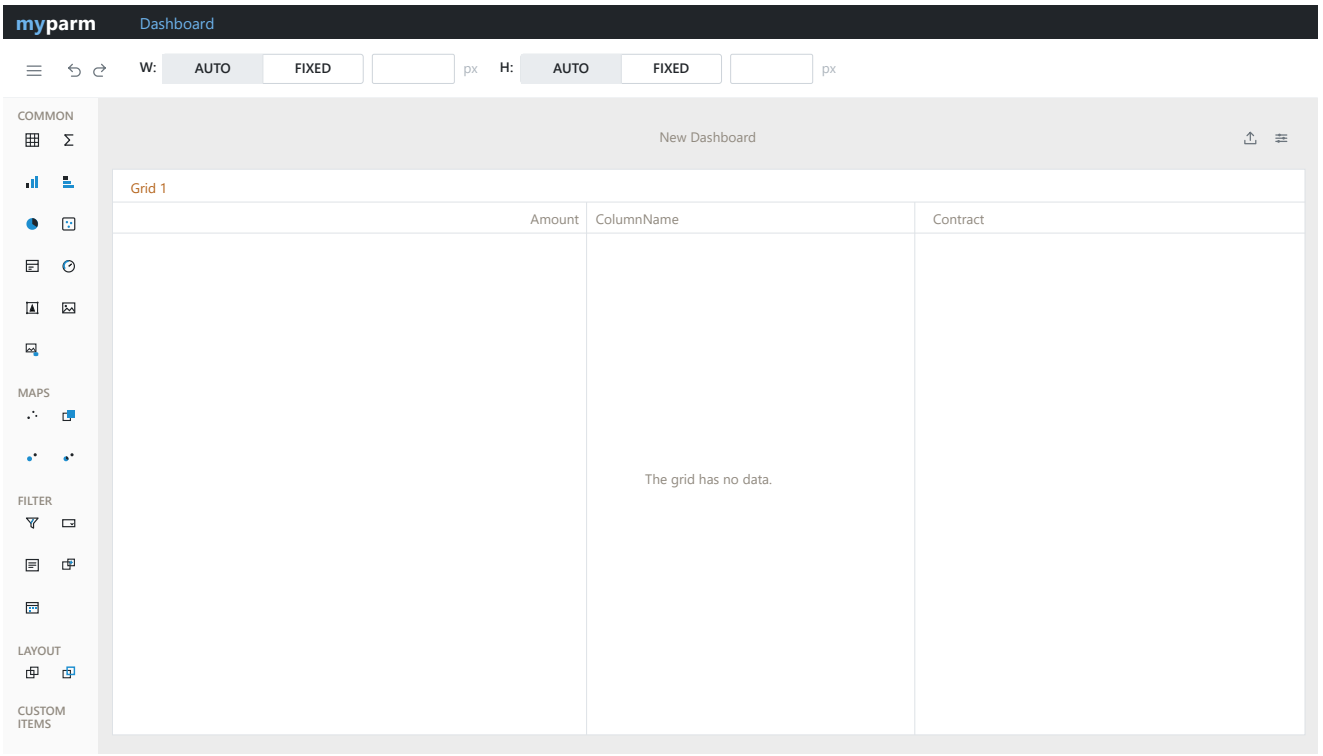
3.1 Opening the designer

The edit screen is opened from the **Dashboards** → **Edit dashboard** menu. It opens the same component as the dashboard viewer, but in **Designer** mode (rather than **Viewer**) — the DevExpress Web Dashboard Control then switches to full design mode.

3.2 Designer interface

In edit mode, the full dashboard editor (Dashboard for Web | End-user Documentation | DevExpress Documentation) is available, letting you, among other things:

- create and arrange elements (charts, tables, cards, filters) on the dashboard grid,
- define data sources — including, through the data source wizard, the option of specifying a custom SQL query (the `enableCustomSql` option is switched on),
- edit the parameters, formatting and data bindings of individual elements.



In edit mode, the logs/comments panel is hidden — it applies only to view mode (see 3.4 Logs and comments — view mode only).

3.3 Additional custom element types

Besides the standard DevExpress elements, the myPARM editor also registers additional, dedicated dashboard element types:

Element	Description
Web Page	Embeds any web page (URL address) as a dashboard element.
Online Map	A map (Azure or Bing provider, RoadMap/Satellite/Hybrid mode) that can display markers and routes.
Gantt Item	A Gantt chart with the columns Subject, Start date, End date.
Parameter Item	A control button/parameter (e.g. an On/Off switch) used to control other dashboard elements.
Polar Chart	A polar chart with an option to display data labels.

These elements are available in the designer's toolbox alongside the standard DevExpress visualization types.

3.4 Logs and comments — view mode only

Outside Designer mode (that is, both in view mode and when a dashboard is reopened for viewing after being saved), a **Logs** panel (log / actions / comments) linked to that dashboard is available:

- on desktop computers, the logs panel opens as a slide-out side panel (an expand button on the right-hand side),
- on mobile devices or in a narrow view, the logs panel is toggled with a separate button (a floating action button), switching between the dashboard view and the logs view and back,
- logs are displayed as a Kanban board and let you add new entries linked to that dashboard.

4. Dashboard access

4.1 Opening the screen

The screen is opened from the **Dashboards** → **Dashboard access** menu. It has the classic list + details layout (master-detail) typical of other screens in myPARM:

- on the left: the list of all dashboards registered in the system,
- on the right: the details panel for the item selected in the list.

4.2 Dashboard list

The data grid contains the following columns:

Column	Description
Name	The dashboard's name. For predefined (system) dashboards, the translated label is shown rather than the raw file name.
Active	Shows whether the dashboard is currently active (available for viewing).
Standard	Indicates whether the dashboard is predefined (delivered as standard with the system) or created as a custom dashboard.

The list can be filtered and searched (a search panel and a filter row are both available). From this list you cannot create new dashboards or delete existing ones — new dashboards are created by saving them in edit mode (Designer); the Dashboard access screen serves only to manage the access and activity of dashboards that already exist.

4.3 Details panel

Once a dashboard is selected in the list, the details panel offers:

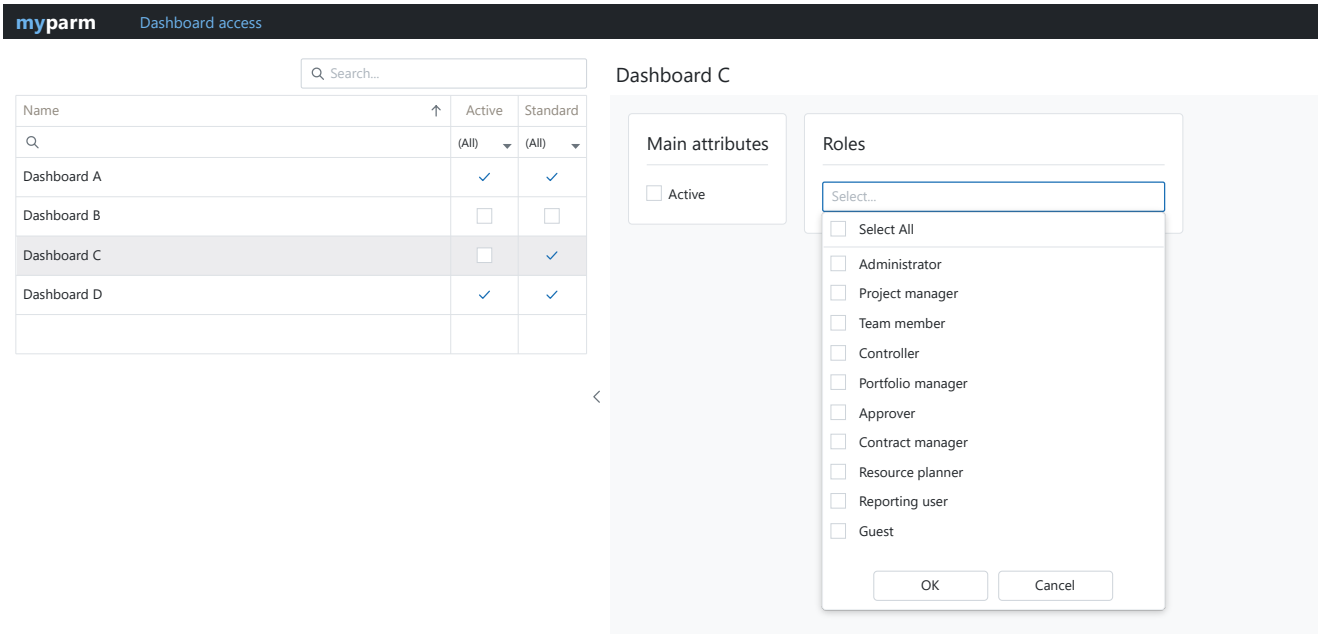
Main attributes section:

- **Active** — a checkbox stating whether the dashboard is active. When a dashboard is inactive, it cannot be opened in view mode (the link to it redirects users to the "Not found" page, even if they hold the dashboard access right).

- **File name** — visible only to users holding the **SuperAdmin** right, and only for predefined dashboards; it shows the dashboard's technical file name (a read-only field).

Roles section:

- The **Roles** multi-select field (a tag box) — the list of roles that have access to the dashboard. Roles can be searched by name, picked from a drop-down list (with buttons to confirm the selection), and removed one at a time from the list of selected tags.
- The roles offered are drawn from the system's list of role signatures (sorted in the order defined for roles).



4.4 Saving changes

The **Save** button sits in the bottom right corner of the screen and becomes active only once a dashboard has been selected from the list and unsaved, valid changes have been made to it (the button turns green once the form is valid and "dirty").

Leaving the screen with unsaved changes is guarded — a warning about unsaved data is shown.

4.5 Handling save conflicts

While saving dashboard access, the system handles the following conflict situations (for example, when another user has changed the role/security-level configuration in parallel):

- Role outside the security level's scope — the system automatically refreshes the list of roles available for assignment.
- Security level violation — the selected dashboard is removed from the currently displayed list (for example, when the dashboard is no longer available to the current user as a result of permission changes).

5. How the two functions relate

- Dashboard editing (Designer) creates and modifies a dashboard's content and appearance (charts, tables, maps, data sources).
- Dashboard access does not change a dashboard's content — it decides only whether a dashboard is active and which roles may view it in view mode.
- Both functions require the `CanMaintainDashboard` right and the **BI** licence, and are available only from the **Dashboards** menu, to authorised users.

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