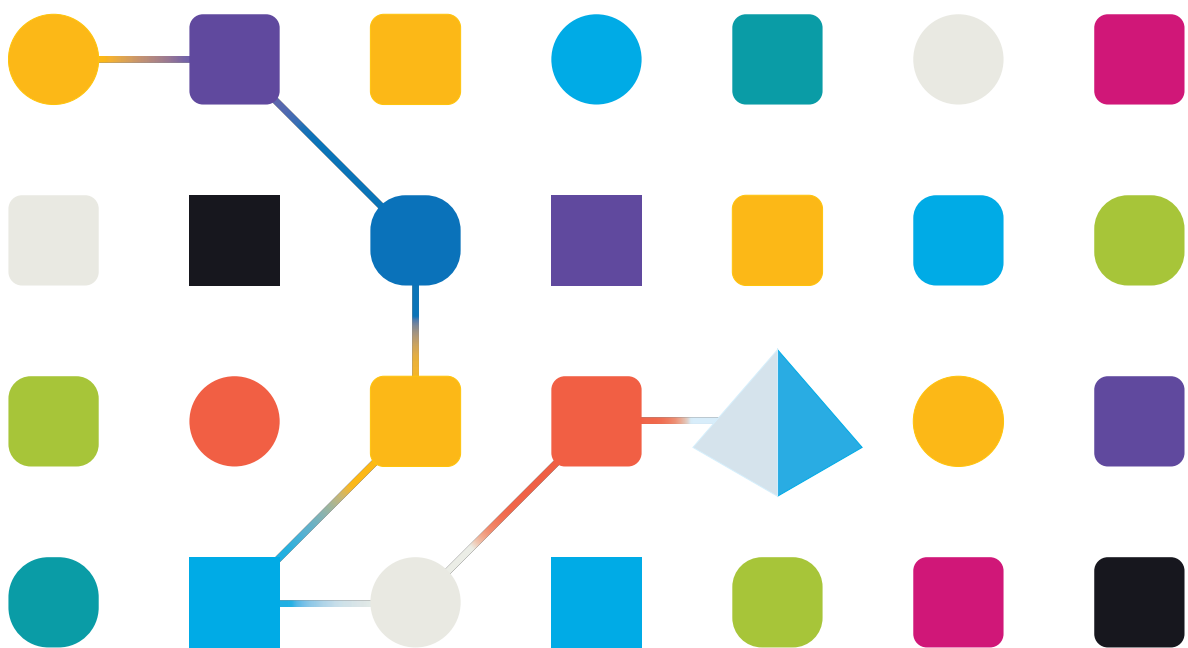




Blue Prism 6.10

Dashboards and Tiles User Guide Dashboards and Tiles User Guide

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Analytics

The Analytics area allows users with the correct permissions to view and edit dashboards. Dashboards are a collection of tiles which provide a visual representation of information from various data sets.

A default dashboard is automatically installed with Blue Prism and is set as the Blue Prism home page for users who have not set their own alternative. The default dashboard is a special global dashboard which can be edited but not deleted.

Dashboard types

The following types of dashboards are available:

Dashboard type	Permission required	Who can view this dashboard?
Personal	Design Personal Dashboards	The logged-in user who created the dashboard.
Global	Design Global Dashboards	All users (with correct permissions - see Permissions - Analytics).
Published	Design Published Dashboards	Users of external applications. Published dashboards share data with external applications and can't be set as the home page. Data from published dashboards can be sent to a database table in the Data Gateways system, and you can set the frequency that data is sent for each dashboard. For more information, see Data Gateways settings .

Create a dashboard

1. Click the **Analytics** tab.
2. Click the **Dashboard** tab.
3. Right-click anywhere inside the Dashboard tab (including any existing dashboards or dashboard groups).
4. Select either **Create Personal Dashboard**, **Create Global Dashboard**, or **Create Published Dashboard**.

When a new dashboard is created, the dashboard is displayed in edit mode. No operations outside of the dashboard can be performed while the dashboard is in edit mode.

5. Edit the dashboard as required.
6. To save the dashboard and exit the edit mode, click the menu button and click **Save**.


Dashboard edit mode

To edit a dashboard, the correct permission must be assigned to the user's role. See [Dashboard types](#) for the permissions required for each dashboard type.

For more information, see [Permissions](#).


To enter edit mode:

1. Click the **Analytics** tab.
2. Click the menu button in the top-right corner of the dashboard.
3. Click **Edit**.

 No operations outside of the dashboard can be performed while the dashboard is in edit mode. A dashboard remains in edit mode until it is saved or the editing is canceled.

In edit mode, you can:

- [Add a tile](#)
- [Resize and remove tiles](#)
- [Move a tile in a dashboard](#)
- [Add a dashboard title](#)
- [Save the dashboard](#)
- [Cancel edit mode](#)

 You cannot copy a dashboard while it is in edit mode. See [Copy a dashboard](#) for more information.

Add a tile to a dashboard

1. Click the **Analytics** tab.
2. Click the **Dashboard** tab.
3. Click the **Tile Library** tab to display the list of available tiles.
4. Drag and drop a tile onto the dashboard.

Tiles can be dropped into any blank space on the dashboard.

If a tile is dropped onto another existing tile, it will take the place of that tile and push the existing tile to a new position.

Resize and remove tiles

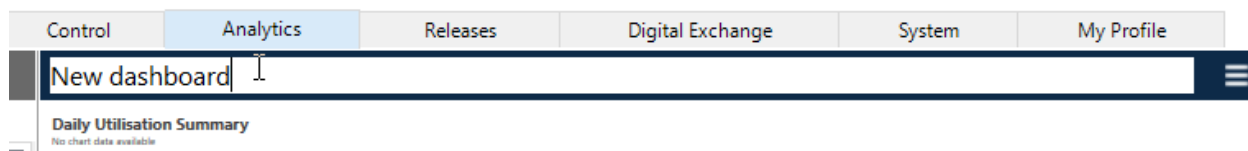
Right-click a tile in edit mode to open the context menu with options to select the size of tiles, or remove them:

- **Small** — The tile occupies one square of the grid.
- **Medium** — The tile occupies two squares of the grid.
- **Large** — The tile occupies one row of the grid.
- **Remove** — The currently selected tile is removed from the dashboard.
- **Remove All Tiles** — All tiles on the dashboard are removed.

Move a tile in a dashboard

You can drag and drop a tile into any other position on the dashboard grid. When tiles are moved, surrounding tiles are automatically moved to fit alongside them.

Add a title to a dashboard



To edit the dashboard title in edit mode:

1. Click in the editable text field and type over the existing text.
2. Click the menu button.
3. Click **Save**.

Save the dashboard

1. Click the menu button in the top-right corner of the dashboard.
2. Click **Save**.

The dashboard will no longer be in edit mode after you click **Save**.

Cancel edit mode

1. Click the menu button.
2. Click **Close**.

If there are unsaved changes a message displays asking whether any current changes should be discarded.

3. Click **Yes** to discard changes and revert the dashboard to its previously saved state, or click **No** to continue working with the dashboard in edit mode.

Copy a dashboard

1. Select the **Dashboard** tab.
2. Right-click a dashboard in the navigation tree area (not currently in edit mode).
3. Select one of the following options from the context menu:
 - Copy As Personal Dashboard
 - Copy As Global Dashboard
 - Copy As Published Dashboard

Once you have selected one of the options above, the copied dashboard is placed into the appropriate dashboard group and given the name *Copy of dashboard name*. The copied dashboard is opened in edit mode.

Delete a dashboard

1. Select a dashboard from the navigation tree in the Dashboard tab.
2. Select **Delete Dashboard** from the right-click context menu.
3. A message displays asking if you are sure you want to delete the dashboard:
 - Click **Yes** to delete the dashboard
 - Click **No** to cancel the deletion

You cannot delete:

- A dashboard that is set as the current home page dashboard for all users
- The Default dashboard
- A dashboard in edit mode

Set dashboard as home page

Any personal or global dashboard can be displayed as the home page. If a personal dashboard is chosen for the home page, it will only be visible to the current user. If a global dashboard is selected for the home page, it will be visible to all users.

To set a new home page dashboard:

1. Click the **Dashboard** tab.
2. Right-click a dashboard in the Dashboards tab.
3. Select **Set as My Home Page**.

The dashboard displays at the top of the list of dashboards and on the home page for the appropriate users.

Set dashboard permissions

The dashboard permissions control a user's ability to work with tiles, or design global and personal dashboards. A user with permission to access [System Manager](#) may set the roles and permissions of another user.

For more information, see [User Permissions](#).

Users without any dashboard permissions will see the default dashboard when logging into Blue Prism.

Dashboard tiles

Dashboards are a collection of tiles which provide a visual representation of information from various data sets. Tiles are created and stored in the **Tile Library** tab and can be added to dashboards.

To work with tiles users need the appropriate permissions (for more information, see [User Permissions](#)).

The data for a tile is taken from a stored procedure created in the Blue Prism database. For more information, see [Data sources](#).

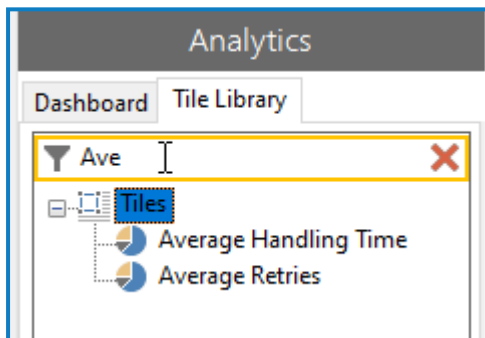
Filter tiles

You can filtering tiles to easily find tiles or tile groups.

To search for an existing tile in the Tile Library tab:

1. Click the **Tile Library** tab.
2. Start typing a search term into the text field at the top of the Tile Library tab.

Any tile in the Tile Library tab that does not match the search term will be filtered out and hidden.

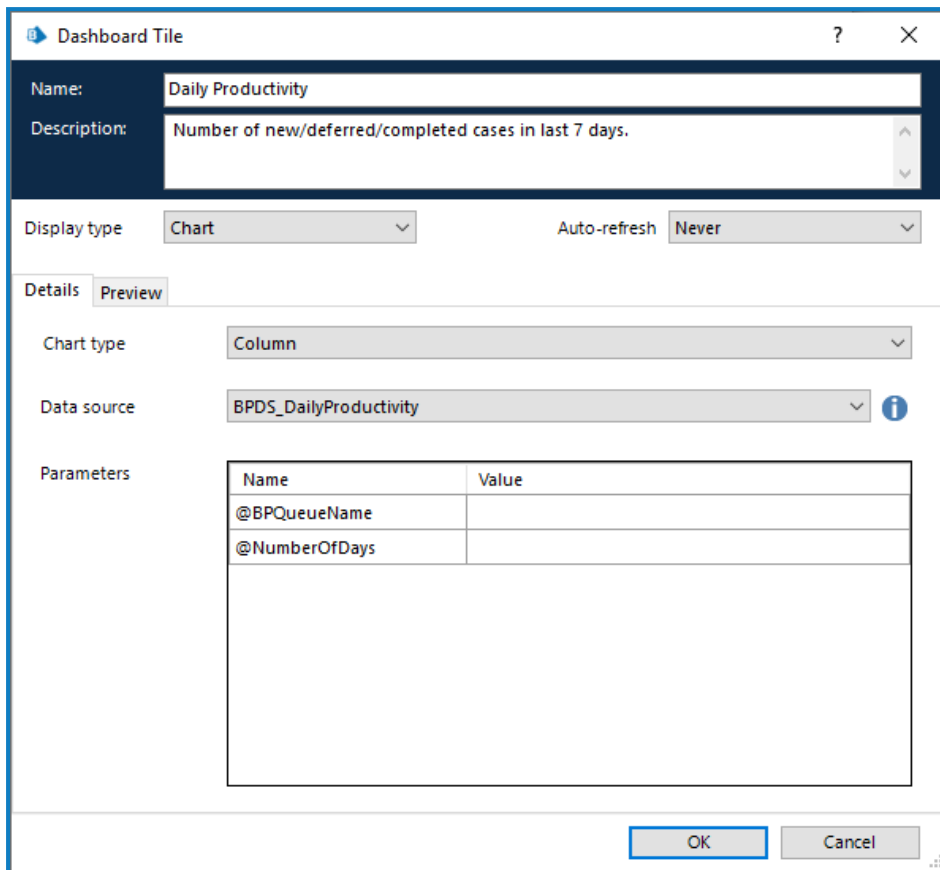


3. To see the full list of tiles again, click the red cross.

Create a tile

1. Click the **Tile Library** tab.
2. Right-click anywhere in the Tile Library tab.
3. Select **Create Tile** from the context menu.

The Dashboard Tile dialog displays:



4. Enter the required information into the fields:

Field	Description	Values/Valid Range
Name	The name of the tile. This will usually reflect a specific metric like number of available runtime resources.	Free-form text value (up to 50 characters). Names do not need to be unique.
Description	A text description giving a more detailed explanation of the values represented in the tile.	Free-form text value (up to 80 characters).
Display type	The type of visual representation of the data.	Selection. The default and only current option is Chart.
Auto-refresh	The interval to poll the server for changes to the tile's data.	Selection. The default is Never.
Chart type	The type of chart to be applied to the data source such as bar chart or pie chart.	Selection. The default is Bar.
Data source	A database stored procedure designed to return the values for the chosen display type.	Selection. List populated from published stored procedures in the Blue Prism database.

Field	Description	Values/Valid Range
Parameters	A list of parameters required as inputs to the Data Source stored procedure.	Data values vary according to the requirements of the stored procedure. For more information, see Data sources .

5. Click the **Preview** tab to view how the tile will appear using the current settings.
6. Click **OK** to create the tile, or **Cancel** to close the dialog and cancel the creation of the tile.
If you clicked **OK**, the new tile name displays in the Tile Library tab.

Edit a tile

1. Click the **Tile Library** tab.
2. Double-click any tile in the Tile Library tab.
3. The Dashboard Tile dialog displays where the tile properties can be amended (see [Create a tile](#) for the list of properties).

Clone a tile

A tile can be copied (cloned) with its existing settings in order to create a new tile. To clone a tile:

1. Click the **Tile Library** tab.
2. Right-click the tile to be copied.
3. Select **Clone tile** from the context menu.
4. A new tile displays in the same [tile group](#) as the source tile, which takes the name of the source tile with the phrase “ – Copy” added to the name.

Delete a tile

1. Click the **Tile Library** tab.
2. Right-click the tile you want to delete.
3. Select **Delete tile** from the context menu.
4. If the tile is currently displayed on one or more dashboards, a warning messages displays. Select **Yes** to delete the tile. It will be removed from all dashboards.

Create a tile group


Tile groups are a way of organizing existing tiles into groups to provide a user-friendly storage structure.

To create a new tile group:

1. Click the **Tile Library** tab.
2. Right-click the root node in the Tile Library tab.
3. Select **Create group** from the context menu.
4. Rename the new group (see [Rename group](#)).

You can drag and drop tiles over the tile group to add them to the group. Tiles are arranged in the order that they were added to the group.

Groups can be nested, and tiles can be placed at any level inside the nested groups.

 Tiles can only be reordered when there are no dashboards in edit mode.

Rename group

1. Click the **Tile Library** tab.
2. Right-click the tile group you want to rename.
3. Select **Rename group** from the group context menu.
4. Type the new name into the text field and press **Enter**.

Remove tile from group

To remove a tile from a group, either drag the tile out of the group or:


1. Click the **Tile Library** tab.
2. Right-click the tile you want to remove from the group.
3. Select **Remove tile from group** from the context menu.

The tile moves out of the group into the next level up.

Delete group

To delete an existing tile group:

1. Click the **Tile Library** tab.
2. Right-click the empty group you want to delete.
3. Select **Delete group** from the group context menu.
4. A warning messages displays. Select **Yes** to delete the group.

 You cannot delete group folders which contain tiles.

Data sources

SQL Stored Procedures provide the data used by a tile, and in order for them to be detected by the tile configurator, the stored procedures must be named appropriately:

- BPDS_I: Data sources with a naming prefix of BPDS_I are reserved to represent internal data sources that are built in to the software.
- BPDS: Data sources with a naming prefix of BPDS are reserved to represent SQL Server stored procedures provided with the software.
 - Custom stored procedures must not be named with this prefix and the existing stored procedures must not be modified in anyway except if advised by Blue Prism.
 - Blue Prism will not recognize stored procedures that are prefixed BPDS unless they have been created by Blue Prism.
 - Any manual changes to these procedures may be subsequently overwritten by a future product update. If any custom changes are required to these stored procedures, create a copy of the procedure with the appropriate prefix for a custom data source.
- DS: The prefix of DS is the required prefix for any custom stored procedures that are created for dashboard tiles.

It is possible to parameterize these procedures, enabling them to be associated with multiple chart tiles, each specifying a different set of parameters – for example to provide the same view for different groups of queues.

Create a custom data source

Where a new stored procedure is manually created in the database, it is necessary to ensure that Blue Prism users can use it. This can be achieved by extending the Blue Prism SQL Security Role named `bpa_ExecuteSP_DataSource_custom`.

```
GRANT EXECUTE ON OBJECT::[Stored Procedure Name] TO bpa_ExecuteSP_DataSource_custom;
```

For example:

```
GRANT EXECUTE ON OBJECT::dbo.DS_DailyProductivity TO bpa_ExecuteSP_DataSource_custom;
```

Alternatively, export the tile from one Blue Prism environment and importing it into another, as this will extend the security role in the target environment automatically.

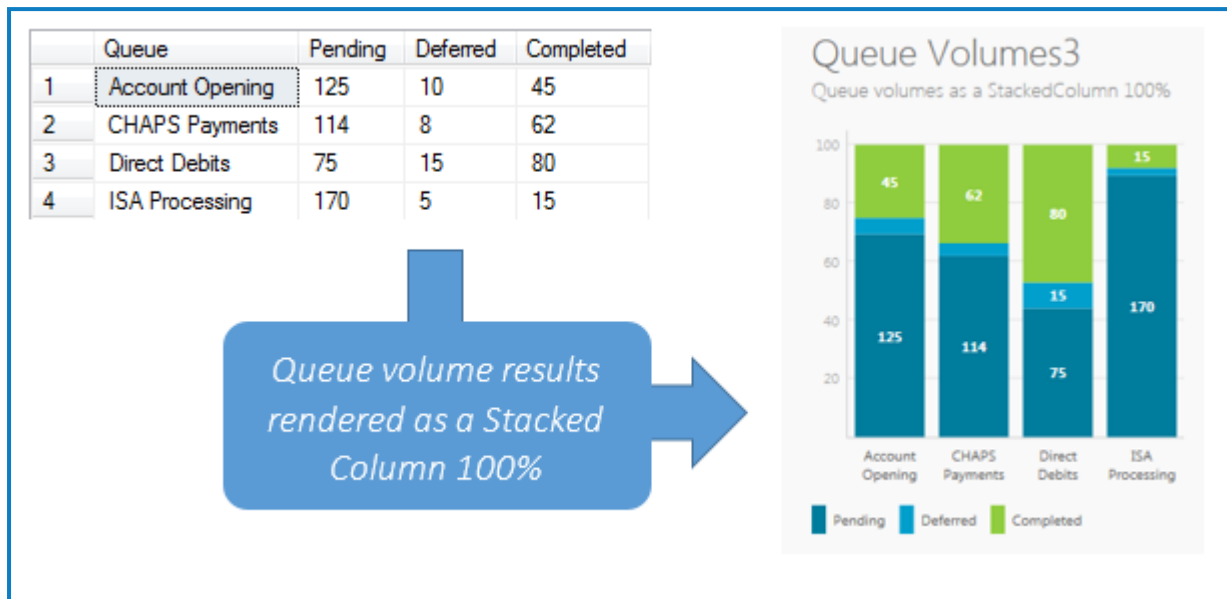
Tile data format

The data used by tiles is derived from a stored procedure which must exist in the Blue Prism database. The stored procedure must return a data table that the stored procedure used for a chart tile to return data in a table. The first column in the returned data represents the chart labels and subsequent columns represent 1 – n series of data.

For example a procedure to return queue volumes by status might be created as:

```
with results as (  
    select a.name as Queue, b.state, COUNT(*) as number  
    from BPAWorkQueue a inner join BPVWorkQueueItem b on b.queueid=a.id  
    group by a.name, b.state)  
  
select Queue, [1] as Pending, [3] as Deferred, [4] as Completed  
from results pivot (sum(number) for state in ([1], [3], [4])) as number;
```

When executed by Blue Prism, this would return the following:



Before any new stored procedure is used within a production environment the performance of the query should be tested on a realistic data set to avoid any system performance problems.