Dashboards in Orange Tracker

Dashboards can provide a quick view of many different types of information, depending on your areas of interest. For example, you could display the list of issues currently assigned to you, view recent activity in selected projects, display a pie chart of open issues broken down by component, list the unassigned issues in a project, etc. You can set up as many dashboard pages as needed.

The Orange Tracker team has created a simple dashboard that displays the following:

- Issues assigned to the current user
- Issues created by the current user
- Issues watched by the current user
- Issues assigned to the current user that were closed within the last 3 months

This dashboard displays important fields like issue key, project name, issue summary, reporter, date created, and date updated. This is a baseline to dashboards and is available to everyone in Orange Tracker. The name of the dashboard is **SU Basic Dashboard** and the owner is **Brian D Chabot (bdchabot)** .

Dashboards contain one or more boxes of information called **Gadgets**. For more information on gadgets, see Gadgets in Orange Tracker. You can easily customize your dashboard by choosing a different layout, adding more gadgets, dragging the gadgets into different positions, and changing the look of individual gadgets. Each dashboard can be configured independently. You can also share your dashboards with other people and choose your favorite dashboards .

Setting Your Home Page to Display Dashboards

You can set the dashboard section to be your home page (the screen you see when you first log into Orange Tracker):

1. Log into Orange Tracker
2. Select your picture or profile in the upper right-hand corner of the top menu to display the "Profile" menu
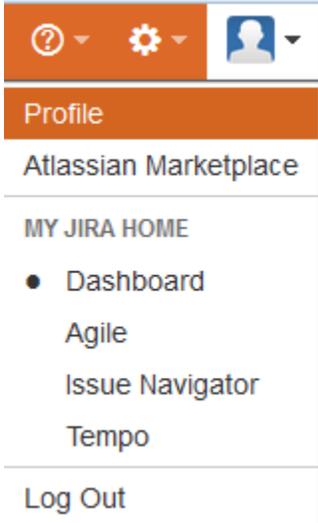

3. Under the "My JIRA Home" section, select "Dashboard" to make it the default screen when you log into Orange Tracker.

If "dashboard" is set as your home page, then the last dashboard you viewed in that browser will display the next time you log into Orange Tracker.

Favorite Dashboards

When you select "Dashboards" from the top menu, you see a list of your favorite dashboards. If you haven't yet set any favorite dashboards, you will see only the default system dashboard listed.
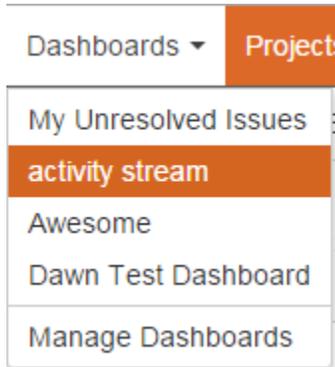
Select one of your favorite dashboards to view it. The list of favorite dashboards will now display in the left-hand column with the currently selected dashboard bolded. The other columns will hold gadgets.
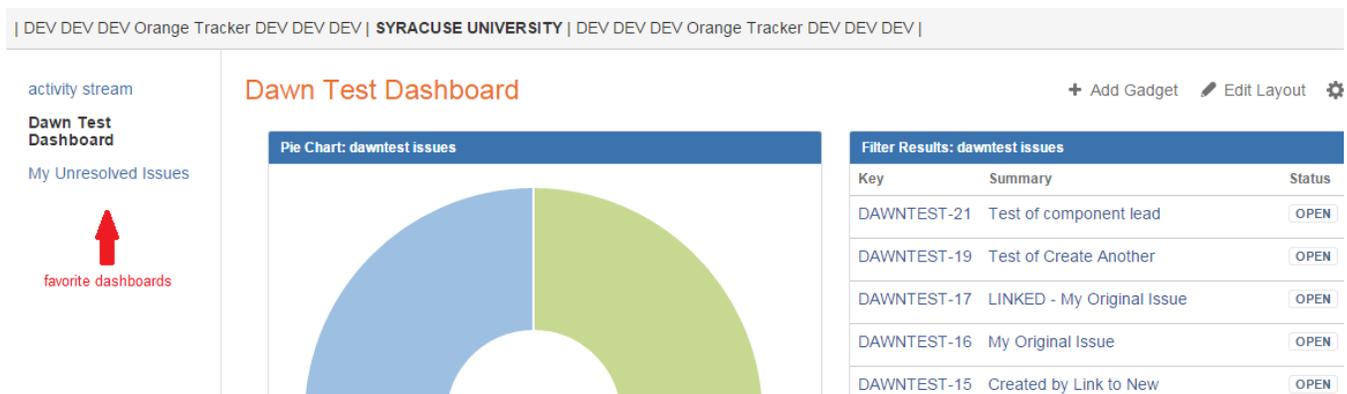
Dashboards that you create are marked as favorites by default. You can mark dashboards created by other Orange Tracker users, if they have been shared with you, as favorites. To mark a dashboard created by other people as favorites, find the dashboard (see Searching for Dashboards below) and then select the "star" icon in the list of retrieve dashboards to mark it as a favorite.

To remove a dashboard from the favorites list:

1. Select "Dashboards" from the top menu
2. Select "Manage Dashboards"
3. Select "Favorites" in the left column
4. Select the "star" icon for any favorite you wish to remove from the favorite dashboard list

Searching for Dashboards

To find a dashboard that is not on your favorites list, do the following:

1. Select "Dashboards" from the top menu
2. Select "Manage Dashboards"

You now have four options for filtering the dashboards in the left-hand menu of the "Manage Dashboards" screen:

- Favorites - shows only dashboards that are currently marked as favorite
- My - shows only dashboards that were created by you
- Popular - shows the top 20 dashboards with the most number of favorites
- Search - lets you search all dashboards that have been shared with you

When you bring up the list of "My" or "Popular" dashboards, you simply select the star icon of the dashboard(s) you wish to be favorites. If you select "Search," you use the search fields to bring up possible dashboard matches:

- **Search** - enter in words that appear in the dashboard name or description
- **Owner** - if you know who created the dashboard, you can enter the user's name, email address, or account name in the "Owner" field to bring up dashboards owned by that person (the creator is the owner by default)
- **Shared With** - if the dashboard relates to a single project, and you know the dashboard has only been shared with a role within that project, you can select "Project" and then the project name and project role. If you know that the dashboard was shared with a specific group (ex: jira-users), then you can select "group" and then enter the name of the group to find possible matches. If you leave the "Shared With" field as "anyone" then the sharing field is not used to limit the search.

To add a dashboard retrieve by the search to your favorites list, select the "star" icon next to the dashboard name.

Creating a Dashboard

The "System Dashboard" that you see under "Dashboards" when you first start using JIRA is a "default" dashboard that has been configured by your JIRA administrator. You cannot edit the "System Dashboard"; but you can easily create your own dashboard, which you can then customize as you wish.

If you are currently viewing a dashboard:

1. select the 'Tools' menu in the upper right-hand corner.
2. Select either 'Create Dashboard' to create a blank dashboard, or 'Copy Dashboard' to create a dashboard that is based on the dashboard you are viewing.

If you are not currently viewing a dashboard:

1. Select "Dashboards" from the top menu
2. Select "manage dashboards"
3. Select "Create new dashboard"

You now see the following screen:

Fill in the following information on this screen:

- **Name** – give the dashboard an appropriate name. This name will be displayed in the "Dashboards" menu.
- **Description** - describe what information will be displayed in this dashboard.
- **Start From** - select blank dashboard.
- **Favorite** - select the star to make this dashboard one of your favorite dashboards.
- **Shares** – displays who can see this dashboard. By default, a new dashboard is not shared with anyone else.
- **Add Shares** - if you want to share your dashboard with other people, you can add shares to the dashboard.   **DO NOT SHARE THE DASHBOARD WITH EVERYONE** - this makes the dashboard available even if you don't log into Orange Tracker (although the issues retrieved will not be viewable unless the person has permissions to view them). If you want to share your dashboard with all Orange Tracker users (which includes students, faculty, staff, alumni, applicants, and non-SU users of Orange Tracker), select "group" and then enter "jira-users."   If you want to share your dashboard with a specific role within a Project, select "Project" and then the appropriate role.   Note that ":users" role for projects usually contains Jira-Users, which is anyone who can log into Orange Tracker. If you are unsure of who is in a role, contact the department responsible for that project or email help@syr.edu.

You can select the "My" link under the "manage dashboards" screen to view dashboards you have created.

Choosing a Dashboard Layout

You can change the look of your dashboard by changing the number of columns on the dashboard and/or the size of the different columns.

- To choose a different layout for your dashboard page (e.g. three columns instead of two) :

1. At the top right of the Dashboard, click the **Edit Layout** link. A selection of layouts will be displayed:
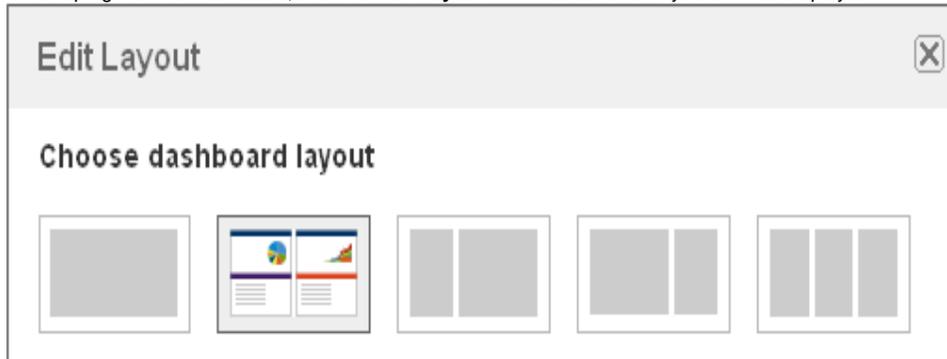

2. Click your preferred layout.

Moving Gadgets

For information on adding gadgets to dashboards, see [Gadgets in Orange Tracker](#). Gadgets are arranged in the columns of a dashboard. You can drag a gadget to move it to another column or to move it up or down in the same column.

To move a gadget:

1. Hover your cursor over the colored title bar at the top of the gadget until the cursor turns into an icon with four arrows. You will see a group of three icons appear in the upper right-hand corner of the menu bar as well.
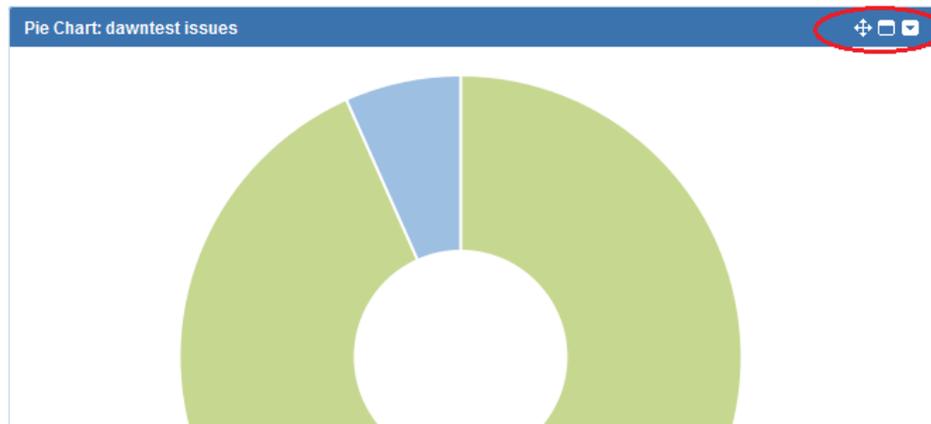
2. Click and hold, then drag the gadget to the position where you would like it to reside.

Other Dashboard Operations

You can copy, edit, delete, and share dashboards.   To access these operations, navigate to the appropriate dashboard page and then select "Tools."

Copying Dashboards

When you select "Tools" and then "Copy Dashboard," you will be taken to the same screen you see when creating a dashboard. The only difference is that the "Start From" field will be filled in with the current dashboard. You will need to give the new dashboard a name. Optionally, you can enter a description, set whether the new dashboard is a favorite, and set up sharing of the dashboard with other users (for more information on these fields, see [Create Dashboard Fields](#)). Once you select "Add," a new dashboard will be created with same gadgets, layout, and look as the dashboard that was copied.

Editing Dashboards

If you select "Tools" and then "Edit Dashboard," you will be taken to the same screen you see when creating a dashboard. You can then adjust the name, description, favorite status, and/or sharing of the dashboard (for more information on these fields, see <u>Create Dashboard Fields</u>). You can only create dashboards that you own (you automatically own any dashboard you create).

Sharing Dashboards

If you select "Tools" and then "Share Dashboard," you will be taken to the same screen you see when creating a dashboard. You can then adjust the sharing of the dashboard (for more information on the share fields, see <u>Create Dashboard Fields</u>). You can only adjust the sharing on dashboards that you own (you automatically own any dashboard you create).

Deleting Dashboards

If you select "Tools" and then "Delete Dashboard," you will be prompted to Confirm the delete. Once you select the "Delete" button the dashboard will be removed and cannot be recovered. You can only delete dashboards that you own (you automatically own any dashboard you create).