

Create HotOperations Dashboard Suites

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Overview

Create a HotOperations dashboard suite to customize the default dashboards that display for Operations Managers and Team Leaders in a HotOperations solution.

A HotOperations solution requires **two dashboard suites**, one for the Operations Manager role and another for the Team Leader role. The easiest method to create a new HotOperations dashboard suite is to duplicate the two source dashboard suites that contain out-of-the-box dashboards for each role.

You can create new HotOperations dashboard suites from scratch, but the new dashboard suites are not automatically populated with the out-of-the-box HotOperations dashboards.

Containers

A container is a tag for a dashboard suite. You assign a dashboard suite to a HotOperations solution using the dashboard suite's container name.

To assign a container to a solution, you need to create an Operations Manager dashboard suite and a Team Leader dashboard suite that have the **same** container name.

HotOperations dashboard suite requirements

There are specific guidelines that you must follow when creating a new HotOperations dashboard suite.

Property	Requirements
Dashboard suite name	<ul style="list-style-type: none">• Create two dashboard suites: one for the Operations Manager and the other for the Team Leader.• Name the dashboard suites OpsManagerCasesDashboard and TeamLeaderDashboard, respectively.
Container	<p>Both the OpsManagerCasesDashboard and the TeamLeaderDashboard dashboard suites need to be assigned to the same container.</p> <p>Note:</p> <ul style="list-style-type: none">• You cannot use the following container names: <i>HotOperations</i> and <i>Default</i>.• Container names are not case sensitive. For example, <i>Eastern Region</i> and <i>eastern region</i> are the same.
Authorization policy	<p>Set the permission for each HotOperations dashboard suite based on the Hot Operations role.</p> <ul style="list-style-type: none">• OpsManagerCasesDashboard: Hot Operation Manager Role Permission• TeamLeaderDashboard: Hot Operation Team Leader Role Permission

Main procedures

1. Duplicate source dashboard suites *or* create new dashboard suites
2. Assign the dashboard suite container to a HotOperations solution
3. View the dashboards in Flowtime

Duplicate source dashboard suites

Create dashboard suites by duplicating the source dashboard suites: **OpsManagerCasesDashboard** and **TeamLeaderDashboard**. These dashboard suites already include a dashboard and commonly used charts, which saves you setup time.

1. Go to Administration>Dashboard Suites, and duplicate one of the source dashboard suites: **OpsManagerCasesDashboard** or **TeamLeaderDashboard**.
2. Locate the duplicated dashboard suite in the list, **copy**, and then click the edit button next to it.
3. In the dashboard suite Board view, click **Edit Properties**, and edit the following fields:
 - a. **Name:** remove the word *Copy*.
 - b. **Container:** enter a name for the container.
Remember that you need to set the same container for both dashboard suites.
 - c. **Authorization Policy:** the appropriate permissions for the dashboard suite you created should already be assigned.
 - For the Operations Manager, make sure **Hot Operation Manager Role Permission** is selected.
 - For the Team Leader, make sure **Hot Operation TeamLeader Role Permission** is selected.

Edit Dashboard Suite Properties

Name *
OpsManagerCasesDashboard

Alias *
Enter the Dashboard Suite's alias to be displayed in runtime
OpsManagerCasesDashboard

Container
Keep "Default" unless you want to change Hot Operations dashboards
Customer Service

Authorization Policy
Keep "Role Based" unless you want to change Hot Operations dashboards
Hot Operation Manager Role Permission

Description

OK Cancel

Image shows duplication of the OpsManagerCasesDashboard

4. Click **OK**.
5. Click **Save**.

6. Repeat steps 1-5 to duplicate the second dashboard.

Create new dashboard suites

When you create new dashboard suites, you can fully customize the dashboards required for your HotOperations solution. New dashboard suites provide an empty framework to which you need to add the required dashboard tiles.

Remember that for HotOperations, you need to create two dashboard suites. One for each role: Operations Manager and Team Leader.

1. Go to Administration>Dashboard Suites, and click **Add Dashboard Suite**.
2. In the Create New Dashboard Suite dialog box, edit the following fields:
 - a. **Name:**
 - For the Operations Manager, make sure the name is **OpsManagerCasesDashboard**.
 - For the Team Leader, make sure that the name is **TeamLeaderDashboard**.
 - b. **Container:** enter a name for the container. In this example, the container name is Customer Service.
 - c. **Authorization Policy:**
 - For the Operations Manager, make sure **Hot Operation Manager Role Permission** is selected.
 - For the Team Leader, make sure **Hot Operation TeamLeader Role Permission** is selected.

Create New Dashboard Suite

Name *
OpsManagerCasesDashboard

Alias *
Enter the Dashboard Suite's alias to be displayed in runtime
OpsManagerCasesDashboard

Container
Keep "Default" unless you want to change Hot Operations dashboards
Customer Service

Authorization Policy
Keep "Role Based" unless you want to change Hot Operations dashboards
Hot Operation Manager Role Permission

Description

Create Dashboard Suite Cancel

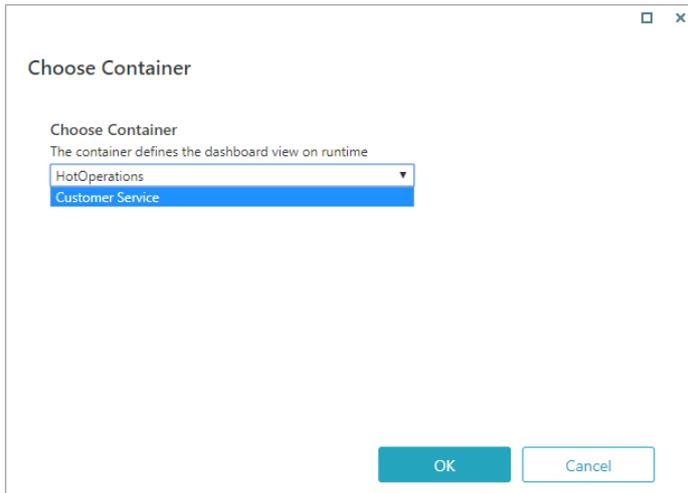
Image shows configuration for the OpsManagerCasesDashboard

3. Click **Create Dashboard Suite**.
The new HotOperations dashboard suite is added to the list of dashboard suites.

4. Locate the duplicated dashboard suite, and click the edit button next to it.
5. Add the required charts to the dashboard tiles.
6. Save the dashboard.
7. Repeat steps 1-6 to create the second dashboard suite.

Assign the dashboard suite container to a HotOperations solution

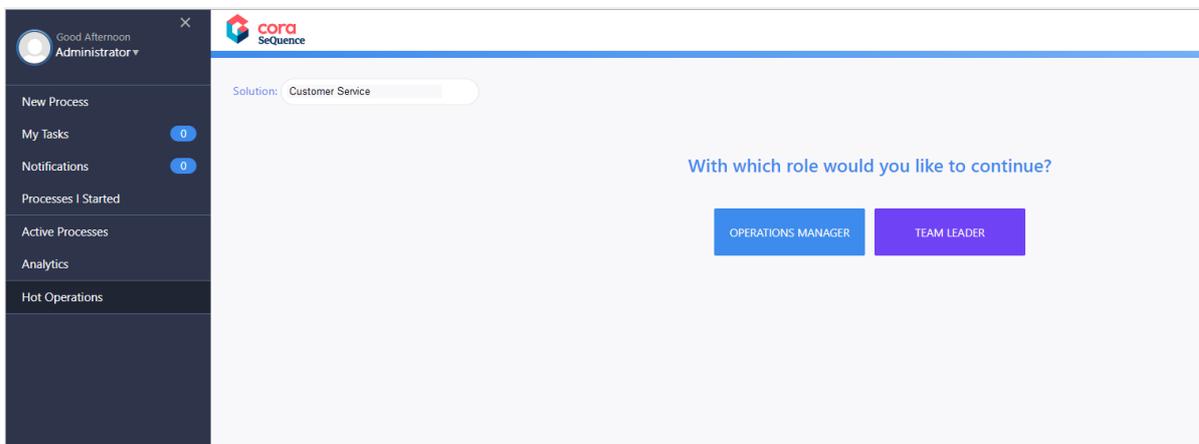
1. Go to **Administration>Solutions**, and then select the solution that you want to assign the dashboard suite to.
2. Click **Choose Container (for runtime dashboards)**.
3. Select the container name used for the relevant Operations Manager and Team Leader dashboard suites.



Note that the list of containers include only the containers that are associated with both Operations Manager and Team Leader dashboard suites.

View the dashboards in Flowtime

1. Sign in to Flowtime, and then click **Hot Operations**.
2. Select the solution associated with the relevant container.
3. Select a role.



4. Verify that the dashboard for the selected role displays correctly.