LaunchPads

Overview

The LaunchPad dashboard is based on "tiles" typically showing graphical information which can be clicked on to run an app.

One of the ways LaunchPad dashboards differ from standard dashboards is that items in the dashboard refer to menu items and not to apps directly and for that reason will only show items to which the user has access to on the menu.

Basic Setup

- Find or create a menu item containing a standard IDI app. Create a view on that app which shows a chart.
- Create a menu item with a dashboard containing the app system/dash, described in app explorer as Dashboard.
- Click the "menu" button up the top right to go into designer mode and choose + Tile. An empty tile appears. The + Tile button may be clicked multiple times to create a set of empty tiles.
- Click the gear button on the new tile to go into the tile settings.
- In the "Menu Item" field either type the menu path to the menu containing the IDI app, or click the magnifying glass to search for it. Once the field is filled out the View field will populate with the list of views available in the IDI app.
- Choose the chart view, created earlier, from the dropdown list.
- Click OK.
- The tile should display the chart view.
- Click the "menu" button again to come out of designer mode.
- Click the tile, the chosen menu item is displayed as a modal window.

The LaunchPad definition saves automatically whilst such changes are made. Clicking the menu item again will show the newly created LaunchPad.

Further tiles may be added in the same way. When the LaunchPad contains multiple tiles they may be rearranged by drag/dropping. This can be done either in or out of designer mode.

Any IDI view type can be used, but typically it would be a graphical view e.g. a chart, gauge, tile or map.

The same menu item may be used in multiple tiles, logically each showing a different view. When the tile is clicked and the menu item is run, each item is run within the context of the clicked tile. Therefore any default view set when the item is run is set for that tile context. Each tile may then show the same app when clicked but with different views.

Allow Customize

The LaunchPad created in Basic Setup above was created with the default argument for Allow Customize which is unticked.

When unticked, the Allow Customize setting means only system admin level users may change the dashboard. This includes rearranging the tiles via drag/drop.

Allow Customize Enabled

When Allow Customize is enabled there are two versions of the dashboard. The default version and the user version.

When a non-sysadmin level user opens such a dashboard they are allowed to make changes. As soon as they make the first change a new copy of the dashboard is created from the default. Subsequent changes are made to that copy.

When Allow Customize is ticked, going into designer mode via the menu button offers different options.

As Non-System Admin Level User

- + Tile
- Revert to Default
- Settings

+ Tile

Add an empty tile to the dashboard.

Revert to Default

Deletes the users' personal copy and therefore shows the default version.

Settings

See Dashboard Settings below

As System Admin Level User

Additional icons are shown for:

- Dropdown showing Mine and Default.

- Set As Default icon.

Mine/Default

This sets whether the dashboard being shown/edited is the sysadmin users' personal copy or it is the global default.

- When choosing from the dropdown, the dashboard is reloaded.

Set As Default

Copies the current dashboard to the default version.

- Only shown when the dashboard version is set to Mine.

- May be used to design a new dashboard separately while set to Mine and once satisfied set it as the default in order that all users get that dashboard by default.

Dashboard Settings

Dashboard settings relate to the LaunchPad as a whole. Access dashboard settings by clicking the gear icon that appears next to the menu icon when entering designer mode.

Title

The title to appear at the top of the LaunchPad.

Title Color

The title font forecolor.

Background Color

The background color of the LaunchPad as a whole.

Background Image

The url of an image to show on the background instead of the background color.

Tile Settings

Access tile settings by clicking the gear icon at the top left of the tile whilst in designer mode.

Menu Item

The path to the menu item to display.

- Clicking the magnifying glass searches the menu.
- Clicking the "play" button launches the currently specified menu item. This can be useful for setting up views without having to leave the LaunchPad. When returning to the settings screen after clicking the play button, the View list is refreshed - therefore any new views are immediately accessible.

If this field is left blank then the View field can be used to refer to an image.

View

The grid view to show for the specified Menu Item.

If the menu item above is left blank then this field can refer to an image.

The reference can be a URL or can be REF:xxxxx to display the document with that reference set

In addition you can specify TAG:NAME1:VALUE1,NAME2:VALUE2 which will display the first document that has those tags. A typical example use of this would be TAG:DOCTYPE:MAINPHOTO,PROJECT:${GLOBAL:PROJECT} which would display the image tagged as MAINPHOTO for the current active project.

Size

The width of the tile.

- Normal = a tile 200px wide.

- Wide = a tile 400px wide.

The height of tiles are currently fixed at 200px.

Refresh every

Refresh the tile every n seconds as specified.

- Standard IDI apps have special support to just reload the view, rather than reloading the app completely.
- Refreshing is paused and resumed when entering and exiting designer mode.

Run Menu Item

An alternative menu item to run when the tile is clicked. For example the tile might be showing the total debt over 90 days.

Clicking the tile could show an app that lists all customers with an over 90 day debt.

- Clicking the magnifying glass searches the menu.
- Clicking the "play" button launches the currently specified menu item.