

| ServiceLink Dashboards |

Navigation: <https://ucrsupport.service-now.com/>

Required Role: ServiceLink Fulfiller (both Accountability Structure & Shared Services Center)

Dashboards enable you to display multiple Performance Analytics, reporting, and other widgets on a single screen. Use dashboards to create a story with data you can share with multiple users.

To take advantage of responsive dashboard functionality, you can convert existing homepages to a dashboard.

Advantages of dashboards include:

- **Responsive design** – The widgets on a dashboard are optimized for the screen you are using: desktop, tablet, or mobile phone.
- **Drag-and-drop widgets** – You can add dashboard widgets precisely where you want them and rearrange the dashboard with easy to use tools.
- **Shareability** – You can share dashboards easily with users, roles, and groups.

When you create a dashboard version of a homepage, the content is added to the new dashboard, but permissions associated with the homepage are not retained. To apply permissions to the dashboard, specify the permissions again. Users with whom you share a dashboard may or may not be able to edit the dashboard or share it with others. The ability to edit or share a dashboard is based on the user's role and the permissions granted to them.


Note: When you convert a homepage to a dashboard, the dashboard is independent of the homepage. Changes you make to the dashboard do not migrate to the source homepage. In addition, changes that you make to the homepage after conversion do not migrate to the dashboard.

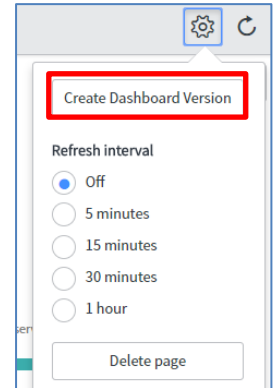
Any homepage you have created or that have been shared with you can be converted to a Dashboard version. When creating a new Homepage, you will see the message below at the very top of the Homepage. Click on the "Create dashboard version" to create a dashboard from an existing homepage.

Make your life easier, create a dashboard! ✕

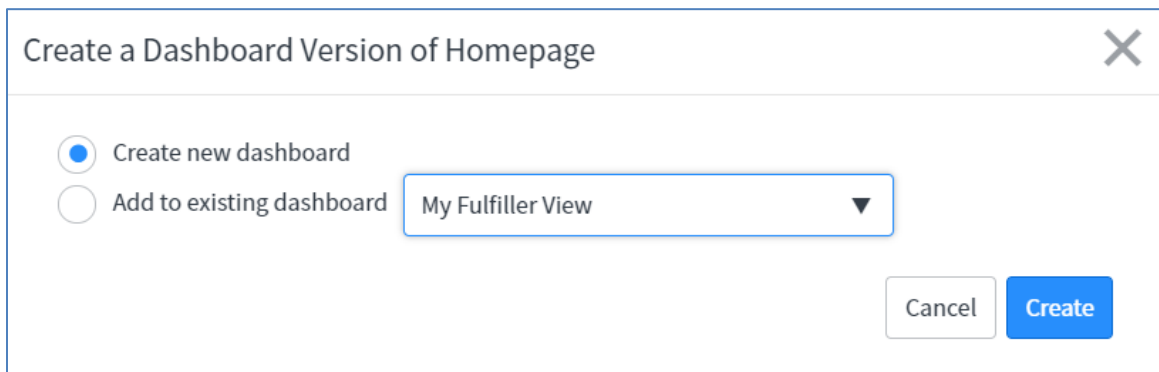
Did you know you can create a dashboard version of this homepage? Dashboards are like homepages, but easier to use. Dashboards have a drag-and-drop canvas that lets you easily add, move, and resize widgets. You can also add multiple tabs. Flexible sharing lets any user view and collaborate on dashboards with you!

[Don't ask me again](#) [Remind me later](#) [Create dashboard version](#)

If you do not see this message on your homepage, click on the  icon located at the top right of the screen. A pop-up window will appear with a “Create Dashboard Version” button. Click on the button to start converting your homepage to a dashboard.



When creating a dashboard version of an existing homepage, a pop-up window will appear asking if you would like to create a new dashboard or add to an existing dashboard. The existing dashboard can be your “My Fulfiller” dashboard or any other dashboard you have created. Click on the downward arrow to select the dashboard you want to add to. Once you have selected an option, click on the “Create” button.



When successful, the dashboard version opens as a new dashboard or as a tab on the selected dashboard.

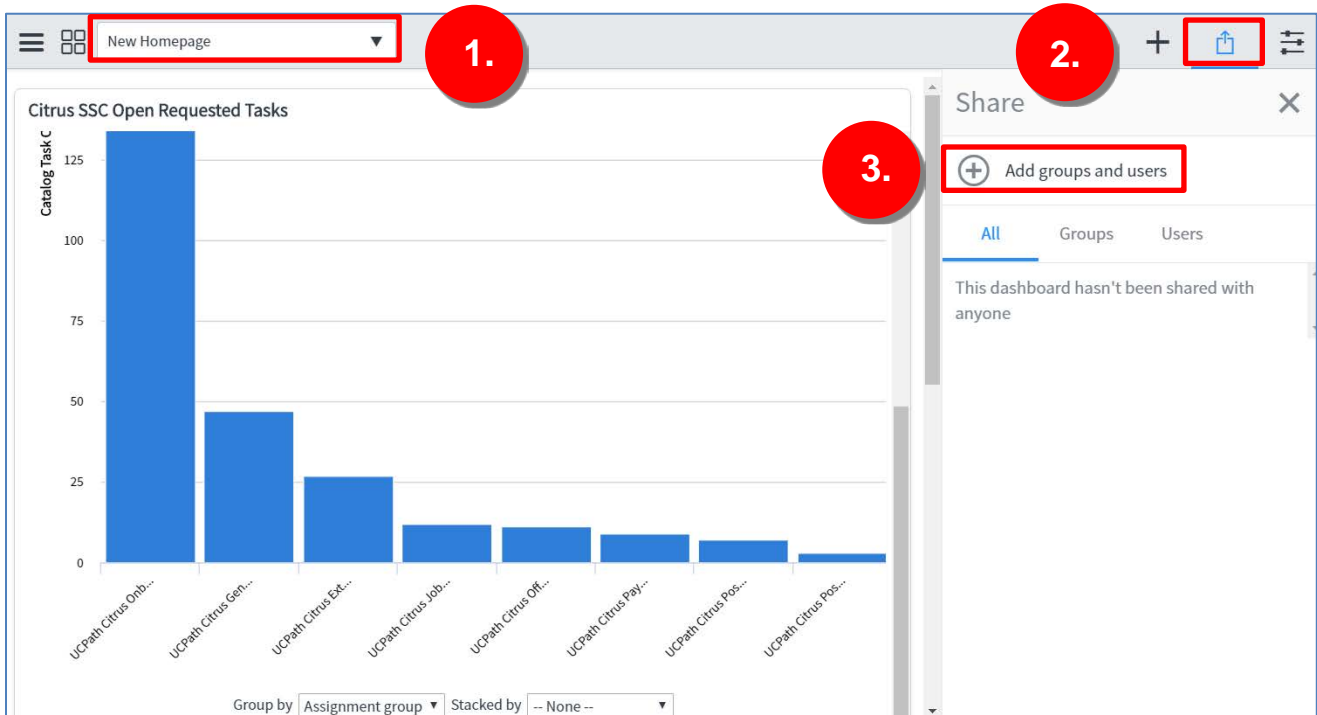
Note: The layout of the dashboard version is similar to the homepage layout but may not be precisely the same.


Homepages with dashboard versions shows a button with the text Open Dashboard Version. This button takes the user to the most recently created dashboard version of the homepage.

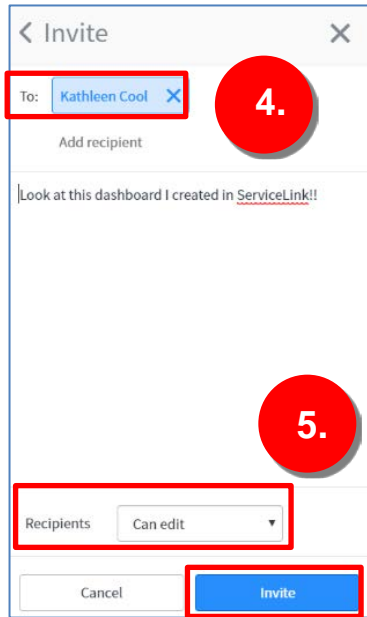
Sharing a Dashboard

All users can share dashboards that they own with other groups and users. Sharing a dashboard enables you and the users you choose to share the dashboard with a shared view of data that can be used for collaboration. You can give other viewing rights or editing rights. Sharing a dashboard does not, however, grant permission to most widgets on that dashboard.

1. To share a dashboard you have already created, you will want to select the dashboard that you want to share from the dashboard picker on the top left.



2. Click the Sharing icon  to open the sharing panel.
3. Once the sharing panel opens, click on "Add groups and users." An invite panel will open, as shown in the screenshot below.



4. In the "to" field, start type the names of users you want to share the dashboard with. You can select a user, group, or role from the list that displays. Users who have the admin, pa_admin, or pa_power_user roles can share their dashboard with other roles.

5. From the Recipients list, select **Can read** or **Can edit** to specify the permissions the user, group or role has on the dashboard.

Note: To edit a shared dashboard, a user must be in the same domain as the dashboard. Sharing a dashboard with write access (**Can edit**) does not change that. The **Can edit** sharing option works only if the dashboard is shared with a use in the same domain as the dashboard.

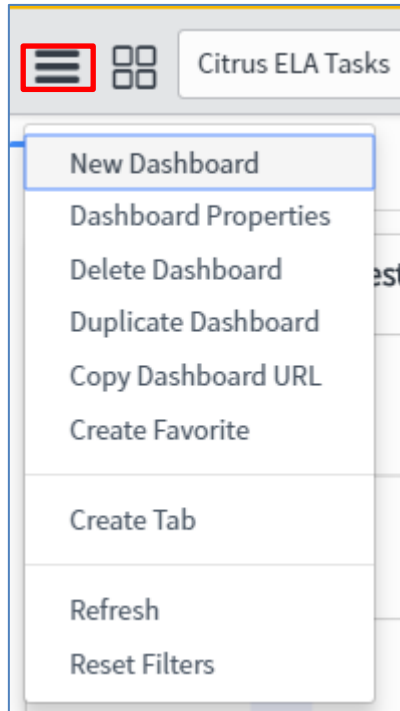
6. Click the Invite button.


Managing a Dashboard

Depending on your role, you may be able to delete or duplicate dashboards, and remove a user from a dashboard. All users can mark a dashboard as a favorite.

Deleting a Dashboard


You can delete dashboards that are no longer used. To delete a dashboard, you must be the dashboard owner. Keep in mind that deleted dashboards cannot be restored.



To delete a dashboard you own, first navigate to the dashboard and click the context menu  and choose Delete Dashboard.

Duplicating a Dashboard


When you duplicate a dashboard, its widget layout is preserved. However, sharing permissions are not preserved. Changes you make to the duplicated dashboard do not affect the original dashboard. Any user who can share a dashboard can duplicate it.

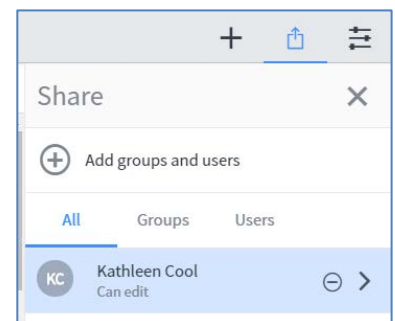
Once you have navigated to the dashboard you want to duplicate, click the context menu  and choose Duplicate Dashboard.

A copy of the dashboard is created with you as the owner. The name of the copy is Copy of [Original Dashboard Name]. To rename the dashboard, click the context menu, select Dashboard Properties, and edit the Name field.

Removing a User from a Dashboard


When you no longer want to share a dashboard with a specific user, group, or role, you can remove them. Any dashboard owner can remove users or groups from dashboards they own.

To remove a user, group, or role, navigate to the dashboard you want to modify and click the sharing icon . Select the user, group, or role that you want to remove. On the information panel of the user, group, or role, click Remove From Dashboard to disable their right to view or edit. You can also modify their access instead of entirely removing their access.



Marking a Dashboard as a Favorite

You can mark a dashboard as a favorite to easily access it from the navigation pane. Anyone who can access a dashboard can make it a favorite.

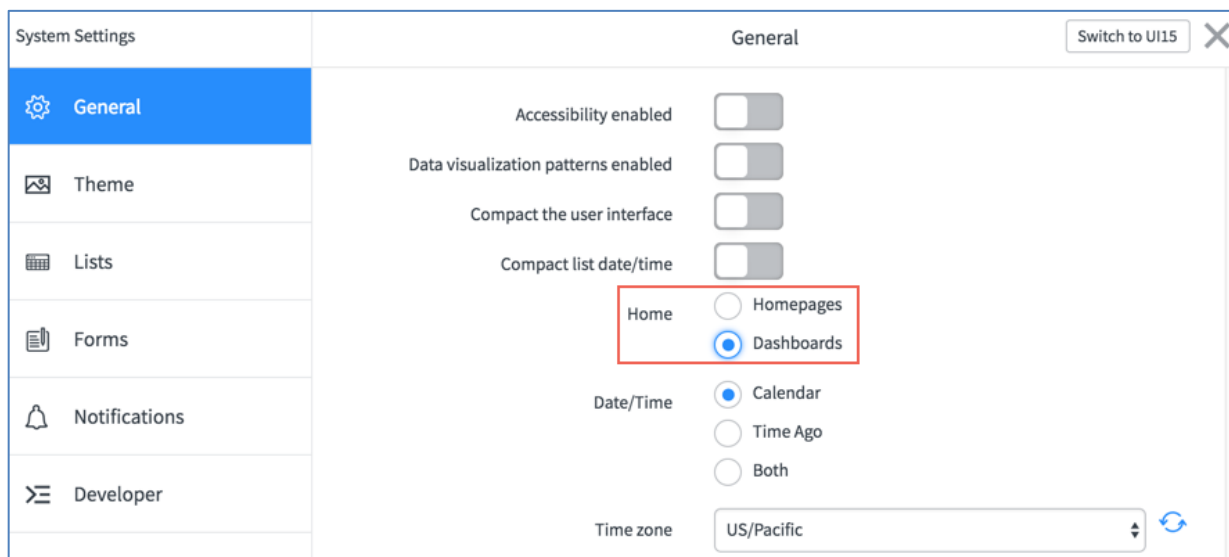
Once you have navigated to the dashboard you want to mark as a favorite, click the context menu  and choose Favorite Dashboard.

Setting Dashboards as your Home

You can set dashboards instead of homepages as your Home. With this setting, the last dashboard you selected appears when you navigate to your Homepage or click on the UCR logo on the upper left corner of the screen.

When dashboards are set as your Home, you can no longer navigate to homepages from the UCR logo. The most recently selected dashboard is always loaded. You cannot specify a specific dashboard as your Home. You can, however, mark a dashboard as a favorite, as outlined above.

To set dashboards as your home, click the gear icon  to access System Settings. Under the General tab, select Dashboards in the Home section.



When you next navigate to your Homepage or click on the UCR logo, the last dashboard you selected appears.

Note: When you convert a homepage to a dashboard, the dashboard is independent of the homepage. Changes you make to the dashboard do not migrate to the source homepage. In addition, changes that you make to the homepage after conversion do not migrate to the dashboard.

A workaround would be to re-convert the updated homepage to a dashboard. The reverse, however, cannot be done. An updated dashboard cannot be converted back to a homepage.

For Advanced Options, consult the full [ServiceLink Reports & Dashboards User Guide](#).