



## Manage Dashboards

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## About Dashboards

You can create custom dashboards for monitoring your network. Dashboards contain one or more dashlets, which include charts, tables, geographic maps, and other types of information.

Any custom dashboard that you create is visible only to your user account. Other users cannot see your custom dashboards.

## Create a Custom Dashboard

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**Step 1** Click the menu icon () and choose **Assurance > Dashboard Library**. The **Dashboard Library** window appears, listing all the defined dashboards.

**Step 2** Click **+ Create a Dashboard**.

**Step 3** In the **Create a Dashboard** dialog box, enter a title for the dashboard.

**Step 4** Click **Save**.  
A blank dashboard appears.

**Step 5** You can do the following in your dashboard:

- a) Click **+ Add Dashlet** to add content to the dashboard.
- b) Check the check box next to the dashlet that you want to add to your dashboard.

**Note** You can search for a dashlet by choosing a category from the drop-down list or by using the search box on the right.

c) Click **Add** to include the dashlet in your dashboard.

**Step 6** (Optional) Drag and drop any dashlet to customize its location on your dashboard.

**Step 7** You can remove a dashlet from your dashboard by doing the following:

- a) Click the trash can icon located in the top-right corner of the dashlet.
- b) In the dialog box, click **Delete**.

**Step 8** Click **Save** to save the dashboard.

## Create a Dashboard from a Template

Creating a dashboard from a template allows you to use a scope to filter the dashboard data. A scope filters devices by location, device type, and other options.

**Step 1** Click the menu icon (☰) and choose **Assurance > Dashboard Library**.

The **Dashboard Library** window appears, listing all defined dashboards and the templates (at the bottom).

**Step 2** In the **Templates** area, click a dashboard template.

**Step 3** In the **Create a Dashboard** dialog box, enter a title for the dashboard.

**Step 4** Click **Save**.

**Step 5** If you want to use an existing scope, select an existing scope and click **Select Scope**.

Skip to Step [Step 15](#) if you selected an existing scope, or continue with the next step if you want to create a new scope.

**Step 6** To create a new scope, click **Create New Scope**.

The first step, **Create New Scope**, is displayed.

**Step 7** Enter a scope name and click **Next**. If you enter a space in the scope name, the space is converted to an underscore. The second step, **Select Location(s)**, is displayed.

**Step 8** Choose one or more locations to include in the scope by checking or unchecking the check boxes next to them.

**Note** You can use the search field to filter locations.

**Step 9** Click **Next**.

The third step, **Select Filters**, is displayed.

**Step 10** If you are using the **Client Health** template, you can use the following filters:

- **Client Type:** Choose wired or wireless to include these types of devices in the scope by checking or unchecking the boxes next to them.
- **SSIDs:** Choose SSIDs to include in the scope by checking or unchecking the boxes next to them. Type in the search field to filter SSIDs. This filter applies only to wireless devices.
- **Host Name:** Enter the hostnames to include in the scope. Use the percent sign (%) as a wildcard and press **Enter** after each entry.
- **Device Type:** Enter the device OS types (for example, IOS or Android) to include in the scope. Use the percent sign (%) as a wildcard and press **Enter** after each entry.
- **MAC Address:** Enter the MAC addresses to include in the scope. Use the percent sign (%) as a wildcard and press **Enter** after each entry.
- **IP Address:** Enter the IP addresses to include in the scope. Use the percent sign (%) as a wildcard and press **Enter** after each entry.

- Step 11** If you are using the **Network Health** template, you can use the following filters:
- **Network Device Type:** Choose one or more device types to include in the scope by checking or unchecking the check boxes next to them. Type in the search field to filter devices.
  - **Network OS:** Choose network OS versions to include in the scope by checking or unchecking the check boxes next to them. Type in the search field to filter versions.
  - **IP Address:** Enter the IP addresses to include in the scope. Use the percent sign (%) as a wildcard and press **Enter** after each entry.
  - **Host Name:** Enter the hostnames to include in the scope. Use the percent sign (%) as a wildcard and press **Enter** after each entry.
- Step 12** Click **Next**.  
The fourth step, **Preview**, is displayed.
- Step 13** Click the **Dynamic list** toggle to enable or disable a dynamic list of clients that is updated based on the selected filters.
- Step 14** Click **Save** to save the scope.  
A confirmation dialog is displayed.
- Step 15** (Optional) Drag and drop any dashlet to customize its location on your dashboard.
- Step 16** You can remove a dashlet from your dashboard from doing the following:
- a) Click the trash can icon located in the top-right corner of the dashlet.
  - b) In the dialog box, click **Delete**.
- Step 17** Click **Save** to save your dashboard.
- Note** If this is a new scope, it can take up to 15 minutes to display data in the dashboard.
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## View a Dashboard

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- Step 1** Click the menu icon (☰) and choose **Assurance > Dashboard Library**.  
The **Dashboard Library** window appears, listing all the defined dashboards. You can use the **Sort By** control to sort dashboards by date or name. You can search for a dashboard by entering its name in the **Find** field.
- Note** When you sort the dashboards by **Date Modified**, even if no modifications were made on the dashboards, the dashboards get sorted by the last time the dashboards were open.
- Step 2** To see dashboards marked as favorites, click the **Favorite Dashboards** tab.
- Step 3** Click the dashboard that you want to view.
- Step 4** In the dashboard controls, click **Show** or **Hide** to show or hide the map, if applicable.
- Step 5** (Optional) Filter dashboard data by time period, sites, or domains by choosing the appropriate values from the filters.
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## Edit or Delete a Dashboard

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- Step 1** Click the menu icon () and choose **Assurance > Dashboard Library**. The **Dashboard Library** window appears, listing all the defined dashboards. You can use the **Sort By** control to sort dashboards by date or name. You can search for a dashboard by entering its name in the **Find** field.
- Step 2** Click the dashboard that you want to edit or delete.
- Step 3** Do one of the following:
- To make changes, choose **Edit Dashboard** from the **Actions** menu. You can add or delete dashlets and drag dashlets to different positions in the dashboard. Click **Save** when you are done.
  - To delete the dashboard, choose **Delete Dashboard** from the **Actions** menu. Click **Delete** in the confirmation dialog.
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## Duplicate a Dashboard

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- Step 1** Click the menu icon () and choose **Assurance > Dashboard Library**. The **Dashboard Library** window appears, listing all the defined dashboards. You can use the **Sort By** control to sort dashboards by date or name. You can search for a dashboard by entering its name in the **Find** field.
- Step 2** Click the duplicate icon for a dashboard (next to the star icon).
- Step 3** In the **Duplicate Dashboard** dialog box, enter a title for the dashboard copy.
- Step 4** Click **Save**.
- Step 5** You can change this copied dashboard by adding, deleting, or rearranging dashlets.
- Step 6** Click **Save** to save the dashboard. A confirmation dialog is displayed.
- Step 7** Click **OK**.
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## Mark a Dashboard as a Favorite

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- Step 1** Click the menu icon () and choose **Assurance > Dashboard Library**. The **Dashboard Library** window is displayed, listing all the defined dashboards. You can use the **Sort By** control to sort dashboards by date or name. You can search for a dashboard by entering its name in the **Find** field.
- Step 2** Click  by the dashlet name to mark it as a favorite.

**Note** You can access favorite dashboards by clicking the **Favorite Dashboards** tab.

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## Change the Position of a Dashlet

You can change the position of the dashlets in the default Assurance dashboards.

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### Step 1

Do one of the following:

- Click the menu icon (☰) and choose **Assurance > Health**.  
The **Overall Health** dashboard appears.
- Click the menu icon (☰) and choose **Assurance > Health > Network Health**.  
The **Network Health** dashboard appears.
- Click the menu icon (☰) and choose **Assurance > Health > Client Health**.  
The **Client Health** dashboard appears.
- Click the menu icon (☰) and choose **Assurance > Health > Application Health**.  
The **Application Health** dashboard appears.

### Step 2

Click the **Actions** drop-down list and choose **Edit Dashboard**.  
The dashboard is refreshed and becomes editable.

### Step 3

Click the dashlet that you want to move and drag it to a different position in the dashboard.

### Step 4

Click **Save**.

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