

New dashboard setting

September 11, 2026

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What a new dashboard setting is

A dashboard setting is the saved arrangement of dashboard tabs and widgets that you create for a dashboard. Use this page when you need to create that arrangement rather than change an existing setting. The editor records the tabs and widgets, then records the changes under **Last Modifications** after a successful save.

If you need to...	Go to
Open the list of saved dashboard settings	Dashboard settings
Create a setting	Before you start , then Open a new dashboard setting
Change a saved setting	Edit dashboard setting
Use the finished dashboard	Dashboard overview

Before you start

The editor protects unsaved changes when you leave it.

Prerequisites

- You are signed in to PAMS.
- You have the dashboard-setting route available in Configuration.
- You know the tabs and widgets that the dashboard needs.

The editor starts in editing mode with the main editing controls available. The saved-record history area appears after the dashboard has been saved.

Open a new dashboard setting

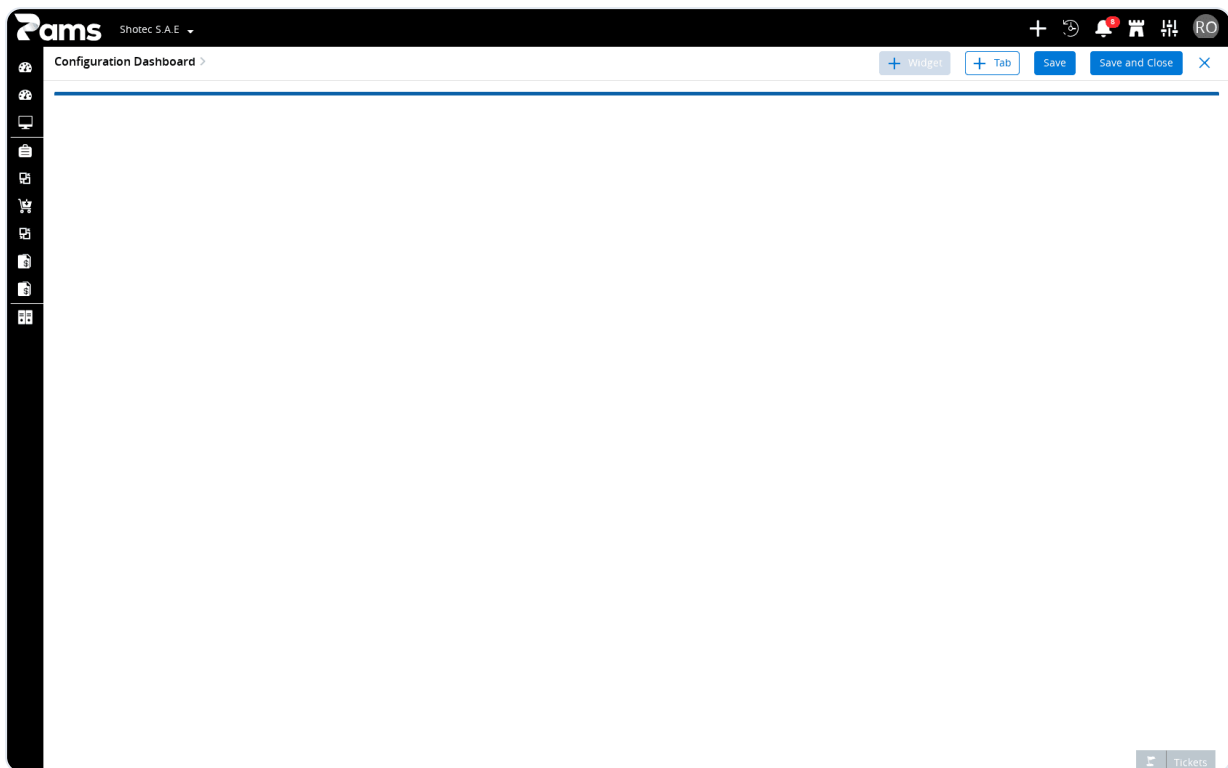
Use the **Dashboard settings** entry in Configuration when you want to create a new dashboard-setting record.

Prerequisites

- You are signed in to PAMS.

Steps

1. Open **Dashboard settings** from the Configuration menu.
2. Open the new-setting route at `/configuration/dashboard-settings/new`.



Result: The dashboard-setting editor opens at `/configuration/dashboard-settings/new` with the main editing controls available.

Understand the editor

The editor combines the dashboard tabs, the active tab, and the controls for saving the setting. It also provides a **Last Modifications** area for a saved dashboard.

A new editor starts with one active user-dashboard tab titled **Tab 1**.

Widget is available for the active user-dashboard tab. It is disabled when there are no dashboard

tabs or when the active tab is not a user dashboard. The tab options menu is available for the active

tab when its tab settings allow the menu.

The top controls are:

If you need to...	Select
Add a widget to the active user-dashboard tab	Widget
Add or choose a dashboard tab	Tab
Store the setting and remain in the editor	Save
Store the setting and leave the editor	Save and Close
Rename the active tab	Rename tab
Remove the active tab	Delete tab

The active tab area changes with the tab you select. When the active tab contains widgets and is a user

dashboard or MRM report, its tab menu provides a **Content:** area and **Search for widget**. The

Last Modifications tab and its history appear after the dashboard has been saved.

Add a tab and its widgets

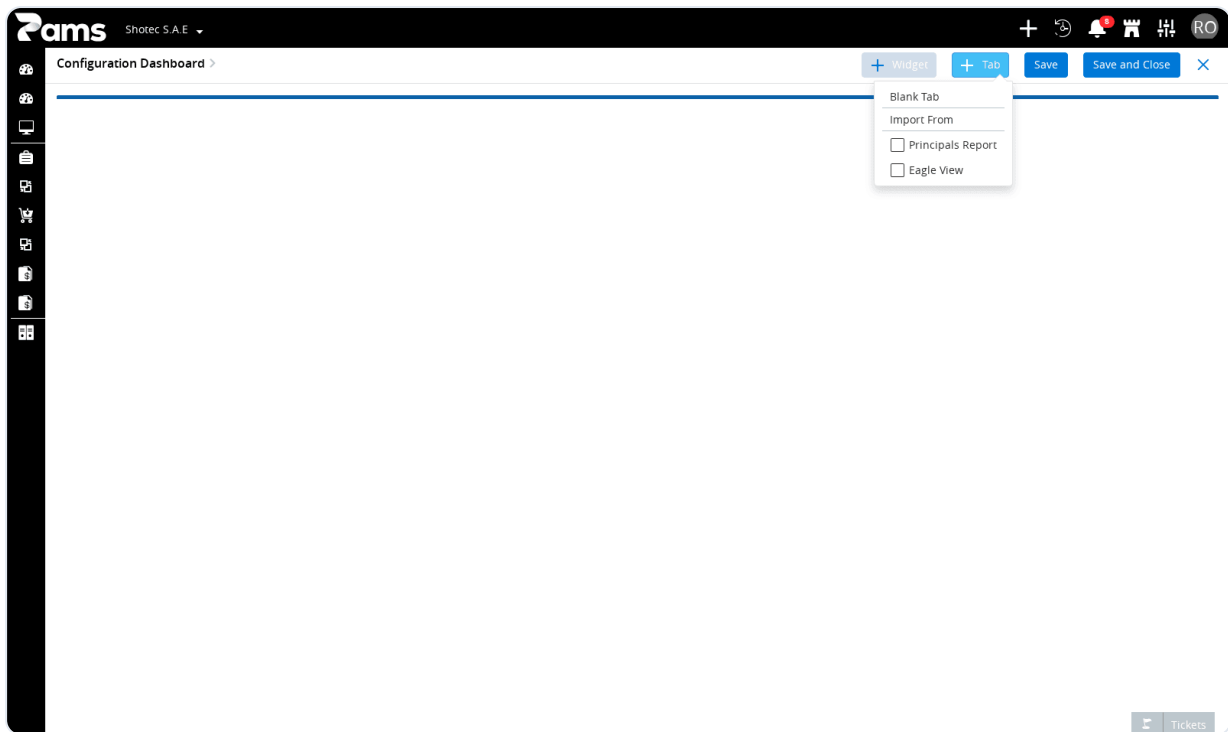
A blank tab is a user-dashboard tab that you name before adding its widgets.

Prerequisites

- The new dashboard-setting editor is open.
- The **Tab** menu is available.

Steps

1. Select **Tab**.
2. Select **Blank Tab**.

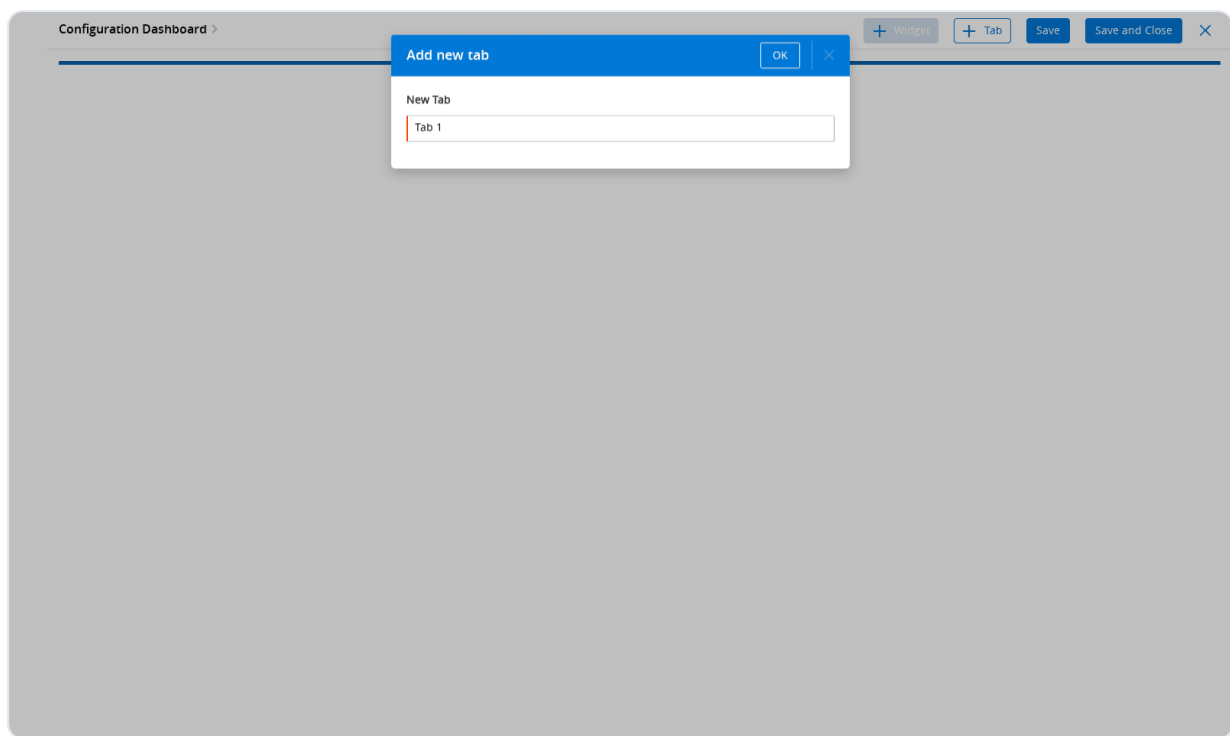


3. Enter a name in **New Tab**.
4. Select **OK**.
5. Select **Widget**.

The widget selection applies to the active user-dashboard tab. When the tab contains widgets, use

Search for widget in its **Content:** menu to find a widget by title.

If you leave **New Tab** empty, the form displays **This Field Is Required** .



Result: A named dashboard tab is available for widget selection, or the blank-tab dialog remains open until **New Tab** contains a value.

Choose the tab variation

The **Tab** menu offers a blank tab, two special dashboard tabs, and an import path. Choose the path that matches the dashboard you are building.

Prerequisites

- The new dashboard-setting editor is open.
- The **Tab** menu is available.

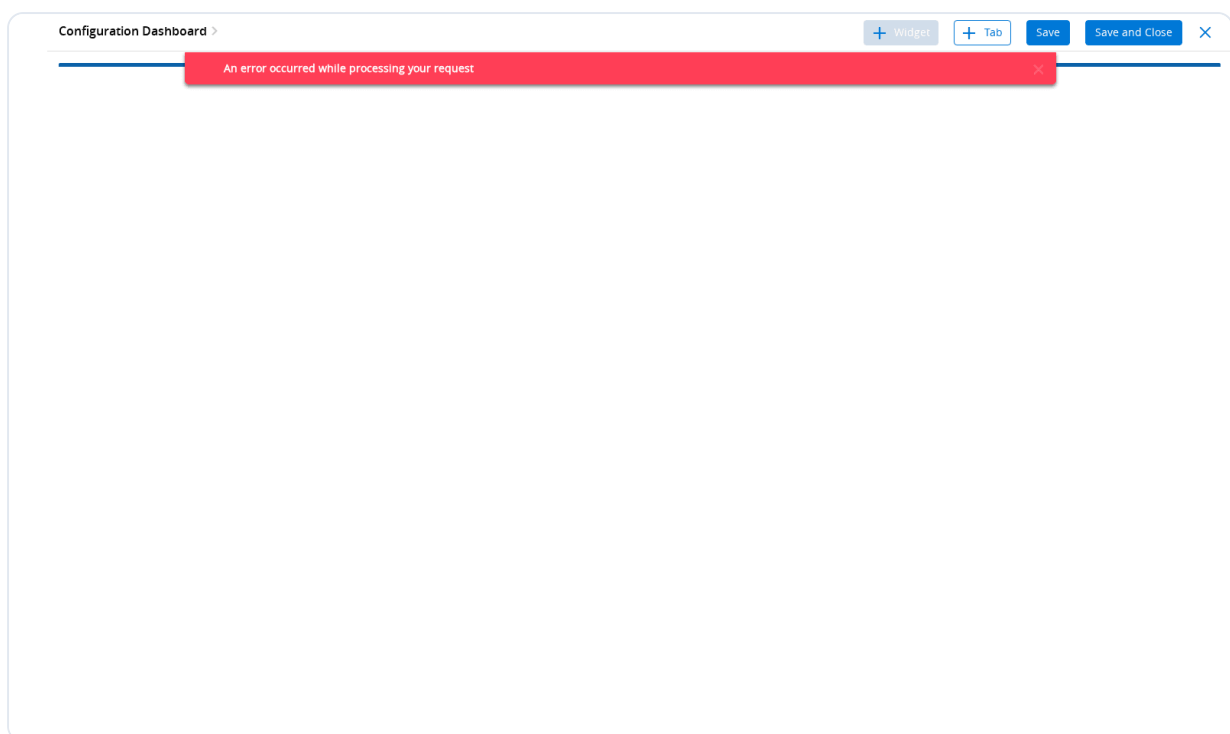
Steps

1. Select **Tab**.
2. Choose one option from the table.

If you need to...	Select
Create a user-dashboard tab that you name yourself	Blank Tab
Add the principals report tab	Principals Report
Add the Eagle View tab	Eagle View

If you need to...	Select
Bring tabs from another dashboard role	Import From

3. If you selected **Import From**, choose a dashboard in **Another role dashboards**.
4. Select the tabs to bring across in **Select tab(s)**.
5. Select **All (Replace existing tabs)** when you want the imported tabs to replace the current tabs.



If **Import From** displays `An error occurred while processing your request` , the editor remains on

`/configuration/dashboard-settings/new` . Retry the import from the editor.

After the selected source dashboard has tabs, the tab-selection checkboxes appear.

Result: The selected tab variation is added to the dashboard editor when that path completes.

Save the dashboard setting

Saving stores the dashboard tabs and widgets as one dashboard setting and records the changes in its modification history.

Prerequisites

- You have added the tabs and widgets that the setting needs.
- The editor is open and **Save** is available.

Steps

1. Select the control shown in the table for the outcome you need.

If you need to...	Select
Remain in the editor	Save
Leave the editor	Save and Close

The save operation counts the dashboard tabs and widgets, stores the dashboard arrangement, saves the dashboard, and then saves the modification log. A successful modification-log save displays

Your request was completed successfully . **Save and Close** then leaves the page.

Result: The dashboard setting is stored; **Save** leaves you in the editor, while **Save and**

Close leaves the page after the modification log is saved.

When the task does not complete

Use the message on screen to choose the next action.

Message	What to do
This Field Is Required	Enter a value in New Tab , then select OK again.
You already have this tab in this dashboard	Return to the tab choices and keep one instance of the special tab.
An error occurred while processing your request	Return to the action you were taking and retry it from the editor.
Are you sure you want to ultimately delete this tab and all it's content ?	Select Delete to remove the tab and its content, or Cancel to close the confirmation menu.

Out of scope

Message	Owning page
Please choose one or more principals	Principals report

After saving

Use the Dashboard settings list to review the saved record and open the edit surface when you need to change it. Use Dashboard overview for the dashboard itself and its widgets.

Result: You know where to review or edit the setting and where to continue using its tabs and widgets.