MODAPPS

Dashboard Studio

Client guide for Odoo 18 and 19

18.0.1.0.3 | 19.0.1.9.6



Permission-aware dashboards, validated custom queries, live layout editing, traceable metrics, fresh exports, and scheduled internal delivery.

WHAT THIS GUIDE COVERS

Start here

Dashboard Studio is an Odoo application for building operational dashboards from saved Odoo models and stored fields. It is designed for organizations that need flexible reporting without turning the dashboard engine into a data-access shortcut.

- Build datasets with a guided field picker or validated structured custom query.
- Use twelve widget types, shared filters, metric lineage, and record drill-through.
- Arrange and resize cards directly on the live dashboard.
- Share validated dashboards with selected internal users or groups.
- Export fresh XLSX/PDF output interactively or schedule internal PDF/XLSX delivery.

Best fit	Odoo 18 or 19 Community or Enterprise on Odoo.sh or self-hosted infrastructure that supports third-party add-ons. Odoo Online databases that block custom add-ons are not supported.

Requirements

Odoo apps	base, web, and mail
Python	xlsxwriter for XLSX and reportlab for scheduled PDF reports
Browser	Current desktop browser; responsive viewing is supported
Optional templates	Sales, CRM, Purchase, Inventory, Invoicing, and Project templates appear only when compatible apps are already installed

ADMINISTRATOR SETUP

Install and assign access

1. Back up the database. Install xlsxwriter and reportlab in the Python environment used by Odoo.

2. Place the modapps_insight_studio folder in an Odoo add-ons path, restart Odoo, and update the Apps list.

3. Search for ModApps Dashboard Studio and activate it.

4. Assign the smallest suitable role: Insight Viewer, Insight Designer, or Insight Manager.

5. For upgrades, replace the complete module directory, restart Odoo, and upgrade the module. Test first on a copy of production.

Roles

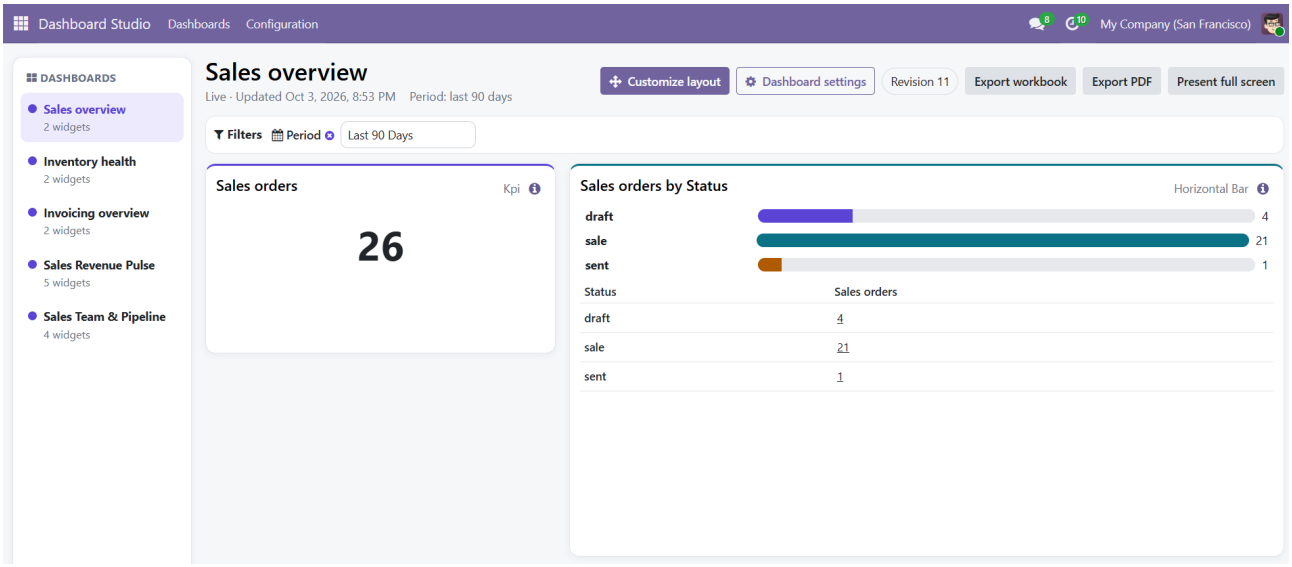
Role	Responsibility
Viewer	Open owned or shared dashboards, filter results, inspect lineage, drill into permitted records, and export readable data.
Designer	Create queries, measures, widgets, filters, layouts, previews, validation, and controlled sharing.
Manager	Govern definitions, templates, safe packages, sharing policy, and scheduled internal delivery.

Important Dashboard Studio roles control access to dashboard definitions. They do not grant access to Sales, Accounting, Contacts, or any other underlying business record.

DAILY NAVIGATION

Open dashboards directly

The dashboard library is the normal viewer entry point. It lists only dashboards the current user is allowed to open. Select a dashboard in the left library to switch immediately; designers can use Customize layout or Dashboard settings without navigating through the definition form.



A compact library, shared filter bar, KPIs, charts, table output, workbook export, PDF export, and presentation mode stay in one workspace.

Refresh-safe Saved dashboard identity is restored from the route. Refreshing a valid dashboard does not create an empty 'false' dashboard or silently change its company scope.

DESIGNER WORKFLOW

Build a dashboard

1. Create a structured dataset from an accessible Odoo model. Add stored fields, calculations, and typed conditions one row at a time.

2. Run Validate & Test. Resolve invalid fields, operations, company scope, currency rules, or preview errors.

3. Create a dashboard and add widgets. Measure and dimension selectors are restricted to the chosen dataset and widget type.

4. Preview each widget with fresh data. Use clear titles such as Confirmed Orders or Untaxed Revenue.

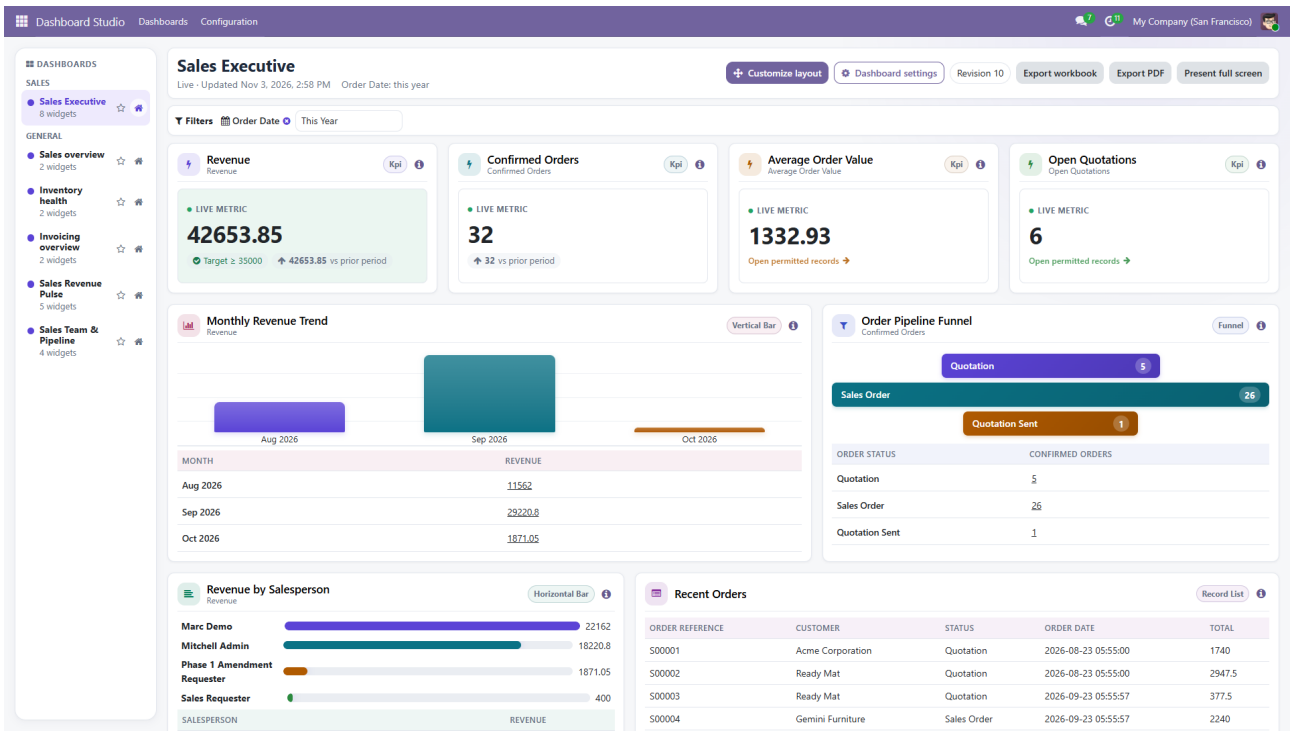
5. Add compatible global filters, arrange the live dashboard, validate the complete definition, then share it with selected users or groups.

No arbitrary SQL	The custom query builder stores validated models, fields, aggregates, operators, and typed values. It never accepts executable SQL, Python, JavaScript, safe_eval, or a browser-supplied domain.

Supported widgets

KPI, gauge, vertical bar, horizontal bar, stacked bar, line, area, pie, donut, funnel, pivot, and record list.

Design for real work

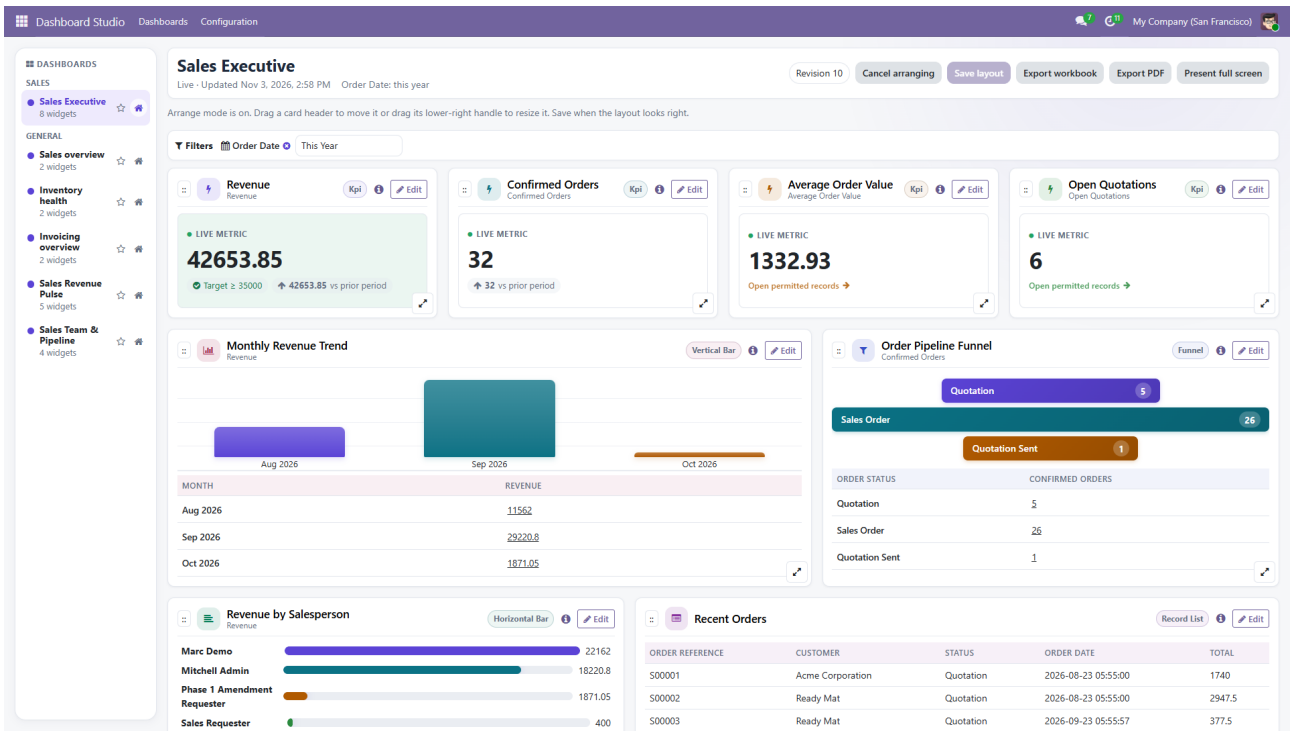


KPIs and trend analysis share a compact filter context. Card colors, density, sizes, and placement help separate priorities without turning the dashboard into a fixed screenshot.

- Choose Customize layout, drag a card by its header, and resize it from the lower-right handle.
- Use the card Edit action to change its dataset, measure, dimensions, visualization, limits, and display settings in context.
- Save layout to preserve the arrangement or cancel to restore it. Keyboard controls support precise positioning.
- Desktop uses a twelve-column grid; narrow screens retain the logical order in a single column.

WIDGET EXAMPLES

Mix summaries with detail



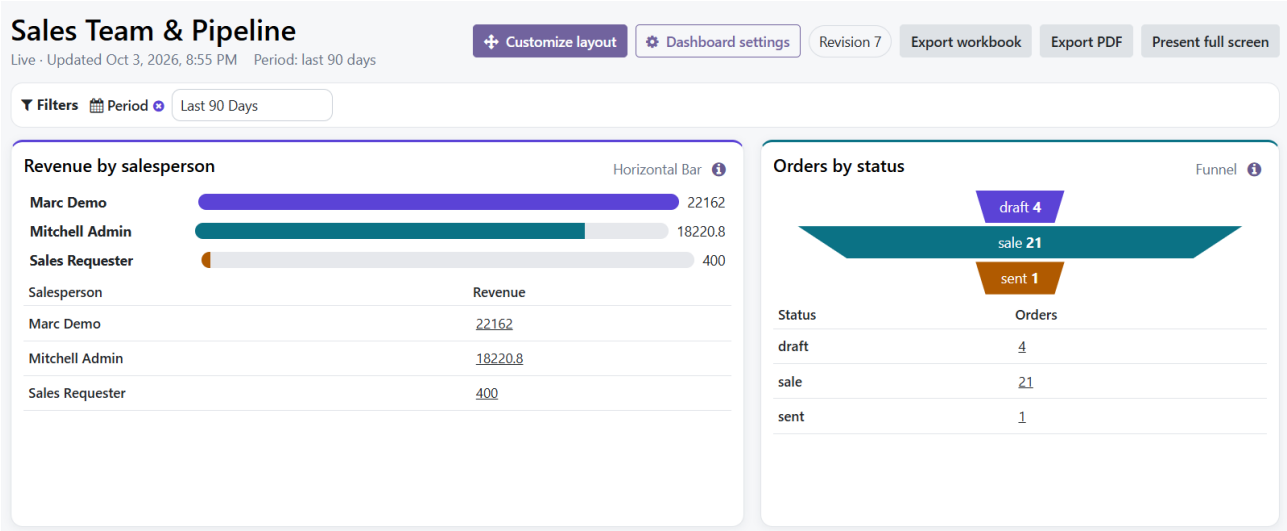
A donut chart can summarize revenue by customer while a record-list widget keeps the recent sales orders visible. Detailed table exports remain available where they are useful.

Filters and drill-through

- Date presets and compact custom From/To inputs share one filter bar.
- The company selector appears only when the viewer has a meaningful choice.
- Lineage explains the saved dataset, aggregation, active filters, company, timezone, currency context, and permitted-record count.
- Drill-through reconstructs the selected segment on the server and opens only records the viewer may read.

OPERATIONAL VIEWS

Compare teams and stages



Bar and funnel views can share one dashboard while retaining their own readable data tables and permission-aware drill targets.

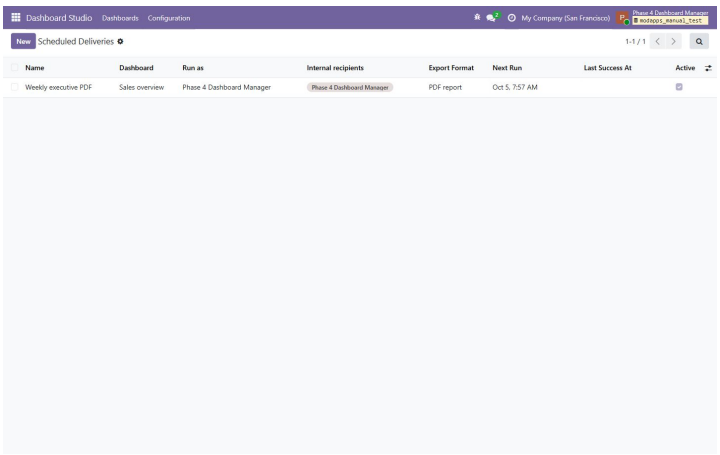
Validation before sharing

Validation checks saved datasets, measures, widgets, filters, and layout before sharing changes are accepted. Open the dashboard as a representative viewer and confirm its record scope before assigning additional users or groups.

Expected difference	Two users can see different totals when their ACLs, record rules, allowed companies, language, or timezone differ. Dashboard Studio preserves those differences instead of normalizing them with elevated access.

CONTROLLED OUTPUT

Export or schedule delivery



Managers can see the saved dashboard, explicit execution identity, internal recipients, format, next run, last success, and active state in one configuration list.

Interactive output

Export workbook creates a fresh multi-sheet XLSX file. Export PDF opens a print-oriented dashboard view. Record-list and pivot widgets can expose table-specific CSV or XLSX output where detailed rows are the useful deliverable.

Scheduled internal output

1. As an Insight Manager, open Configuration > Scheduled Deliveries.
2. Select a validated dashboard and an explicit Run as user.
3. Add active internal Odoo users with email addresses as recipients.
4. Choose PDF or XLSX, set the interval and next run, then save.
5. Use Send now to validate the full path before relying on the schedule.

Execution identity	The attachment is rebuilt from fresh queries under the saved Run as user's current ACLs, record rules, companies, field groups, language, and timezone. If that access is revoked, the delivery fails closed and records a safe error. The scheduler handles the envelope only; it does not grant business-data access.

Public links, portal recipients, arbitrary email addresses, and external report storage are not supported.

KNOW THE BOUNDARY

Security and operating limits

- Business rows are queried without sudo under the viewer or saved scheduled execution user.
- Cache entries are short-lived and isolated by database, user, groups, companies, locale, active context, filters, and definition revisions.
- Exports, previews, drill-through, and lineage counts use fresh permission checks.
- At most 100 widgets per dashboard; record lists cap at 200 rows; categorical results cap at 100 groups; pie, donut, and funnel cap at 20.
- Definition packages contain configuration only, never business rows or sharing identities. Imports reject active content, external URLs, unsupported references, and oversized packages.

Deliberate exclusions

External sources, ETL, data marts, arbitrary executable query text, write-back, public or portal sharing, arbitrary email recipients, external report storage, AI, forecasting, snapshots, definition rollback, custom chart plug-ins, and authoritative statutory reporting.

OPERATE CONFIDENTLY

Troubleshooting and support

Symptom	Check
Dashboard not listed	Confirm it is active, validated, and shared with the current user or one of the user's groups.
No permitted records	Clear filters, verify allowed companies, and confirm the user can open the same source records in the standard Odoo application.
Measure unavailable	Confirm the measure belongs to the widget dataset and its aggregation is compatible with the selected field.
XLSX export fails	Confirm xlsxwriter is installed in Odoo's Python environment, then restart Odoo.
Scheduled PDF fails	Confirm reportlab is installed. Verify the Run as user and recipients remain active internal users with the required access and email addresses.

Support

Email info@modapps.dev with the Odoo edition and exact build, hosting type, module version, dashboard and widget names, user role and allowed companies, reproduction steps, visible error, and a relevant server-log excerpt with secrets removed.

ModApps targets an initial response within one business day. This is a response target, not a guaranteed resolution time.

Do not send passwords, API keys, session cookies, customer exports, unredacted personal or commercial data, or full database backups by email.

Product links	Documentation: https://www.modapps.dev/docs/dashboard-studio.html Odoo 19: https://apps.odoo.com/apps/modules/19.0/modapps_insight_studio Odoo 18: https://apps.odoo.com/apps/modules/18.0/modapps_insight_studio