

REPORTS DASHBOARD

ADD A NEW REPORT

Reports Dashboard is an application that graphically displays critical business information onto a dashboard which can be viewed graphically in Real-time.

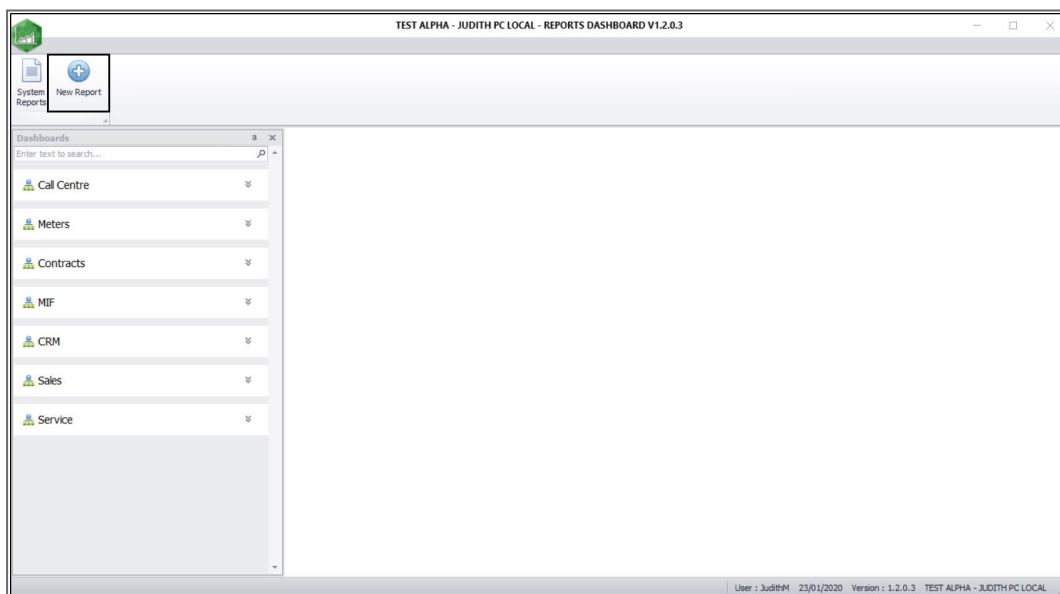
In **Reports Dashboard** you can add customized reports.

Access: *Reports Dashboard Icon* > [Log In](#)

The **Reports Dashboard** application will open.

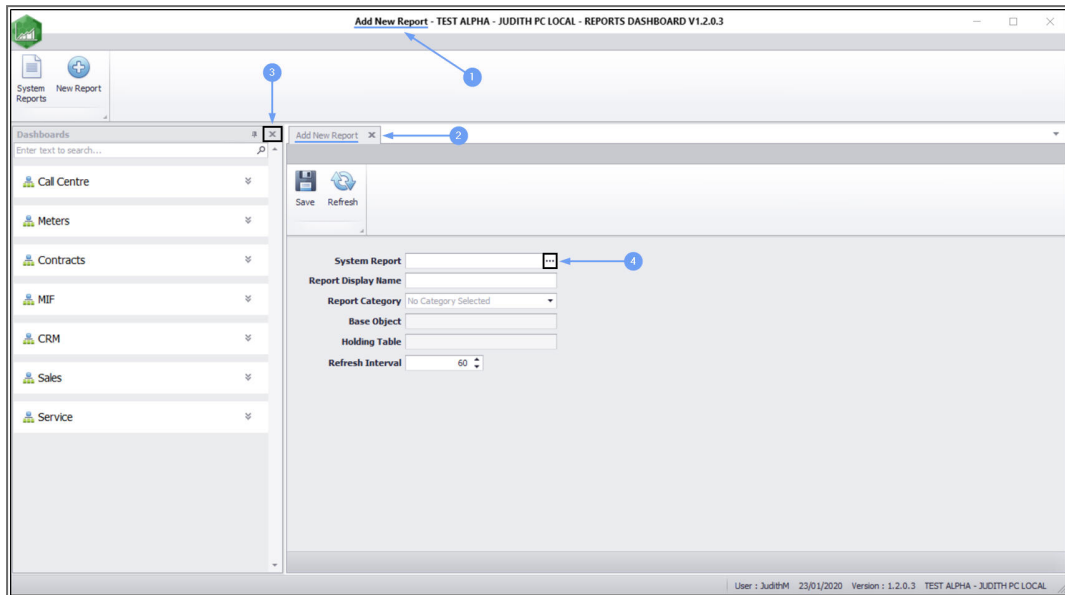
ADD NEW REPORT

- Click on **New Report**.

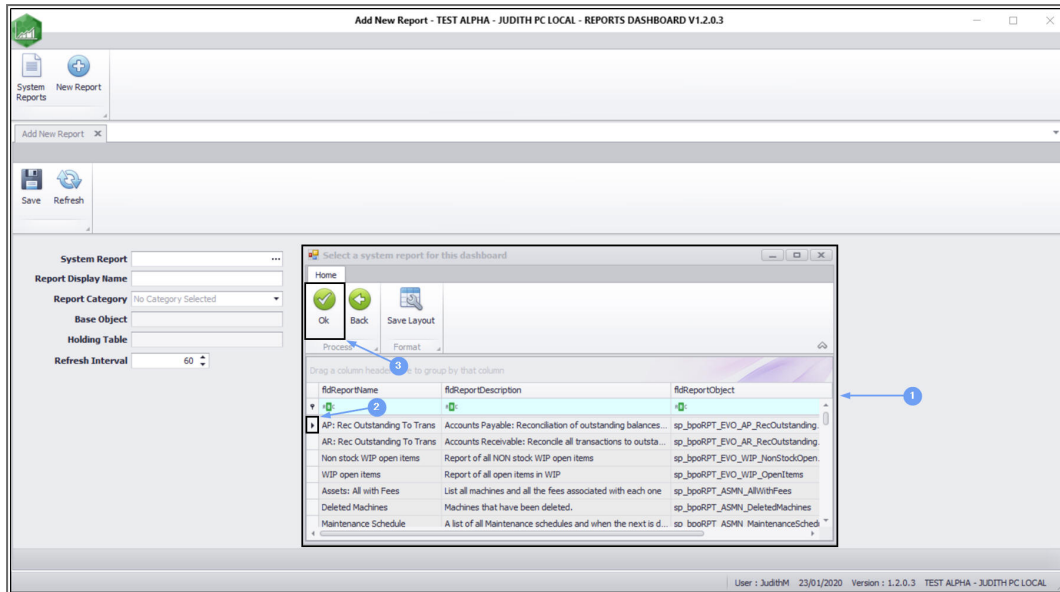


1. The **Add New Report** screen will be displayed.
2. The **Add New Report** tab will open.

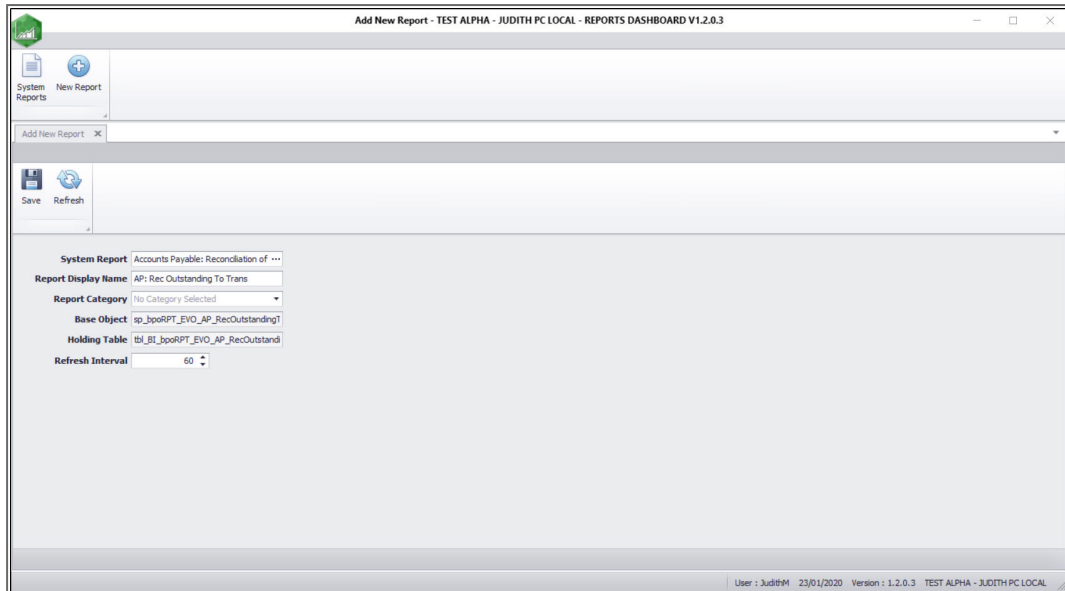
3. If the **Dashboard Panel** is displayed, close the panel.
4. Click on the **Ellipsis** button in the **System Report** field.



1. The **Select a system report for this dashboard** screen will be displayed.
2. Select the relevant system report.
3. Click on **Ok**.
 - **Note:** Reports must first be loaded via [Configurator - System Reports](#) for them to appear in this screen.



- The following fields will be auto populated with data pertinent to the system report selected in the previous step:
 - System Report
 - Report Display Name
 - Base Object
 - Holding Table
 - Refresh Interval (The default refresh interval is **60** and the interval units are in **minutes**).



System Report: Accounts Payable: Reconciliation of ...

Report Display Name: AP: Rec Outstanding To Trans

Report Category: No Category Selected

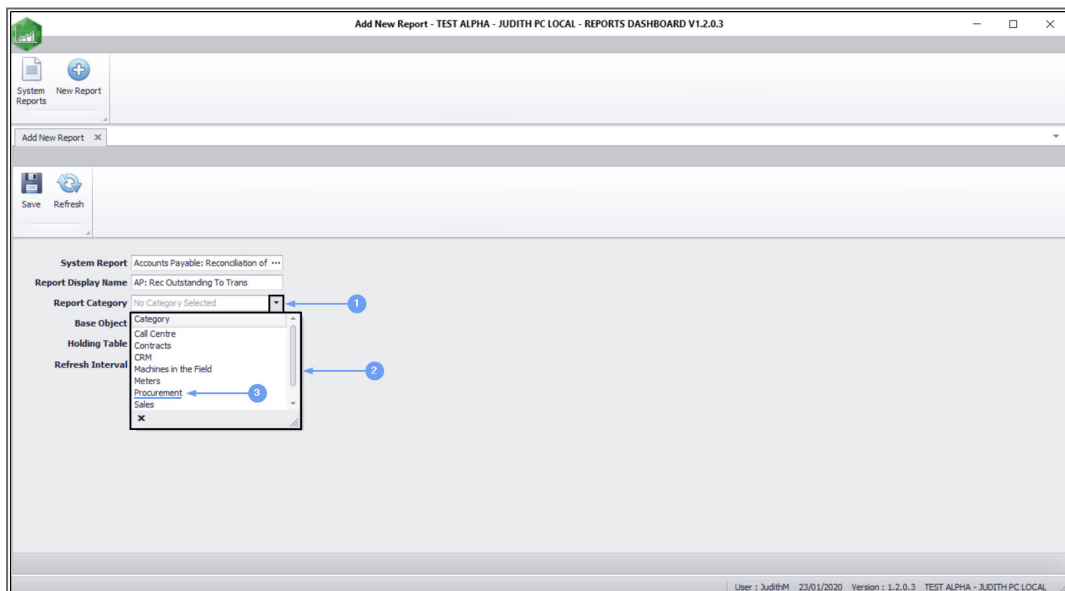
Base Object: sp_bpoRPT_EVO_AP_RecOutstanding

Holding Table: tbl_BI_bpoRPT_EVO_AP_RecOutstand

Refresh Interval: 60

1. Click on the **down arrow** in the **Report Category** field.
2. A **Category** screen will be displayed.
3. Select the relevant category.

■ **Note:** If you do not see the required **Category** or if you wish to add additional **Categories**, these can be created in **BPO Configurator - Static Data – Reports Dashboard Report Category**, with the CodeType: 'REPORTS'.



System Report: Accounts Payable: Reconciliation of ...

Report Display Name: AP: Rec Outstanding To Trans

Report Category: No Category Selected

Base Object: Category

Holding Table: Call Centre

Refresh Interval: Contracts

CRM

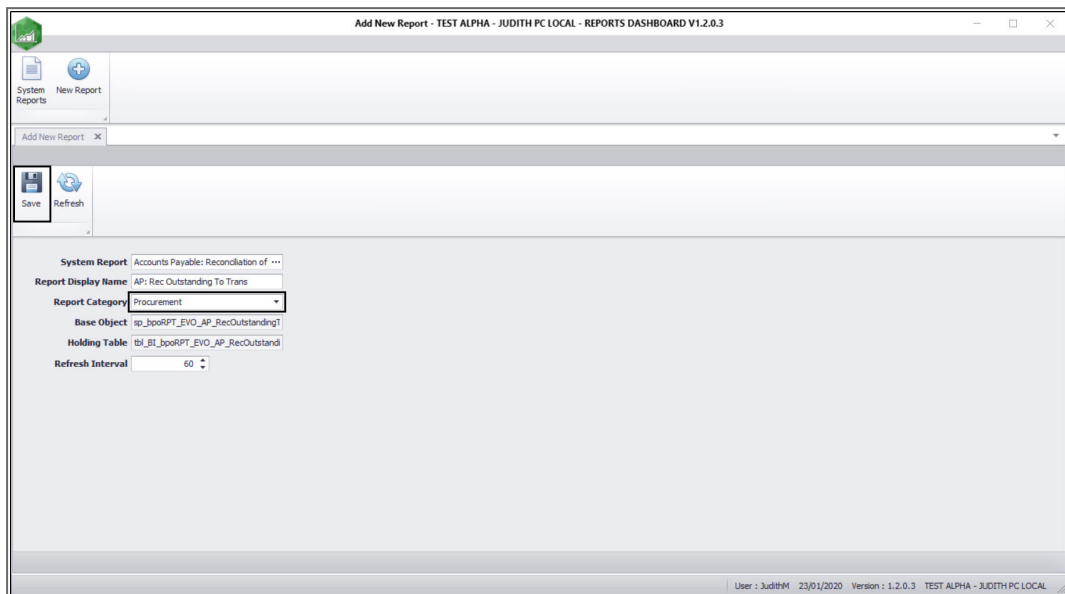
Machines in the Field

Meters

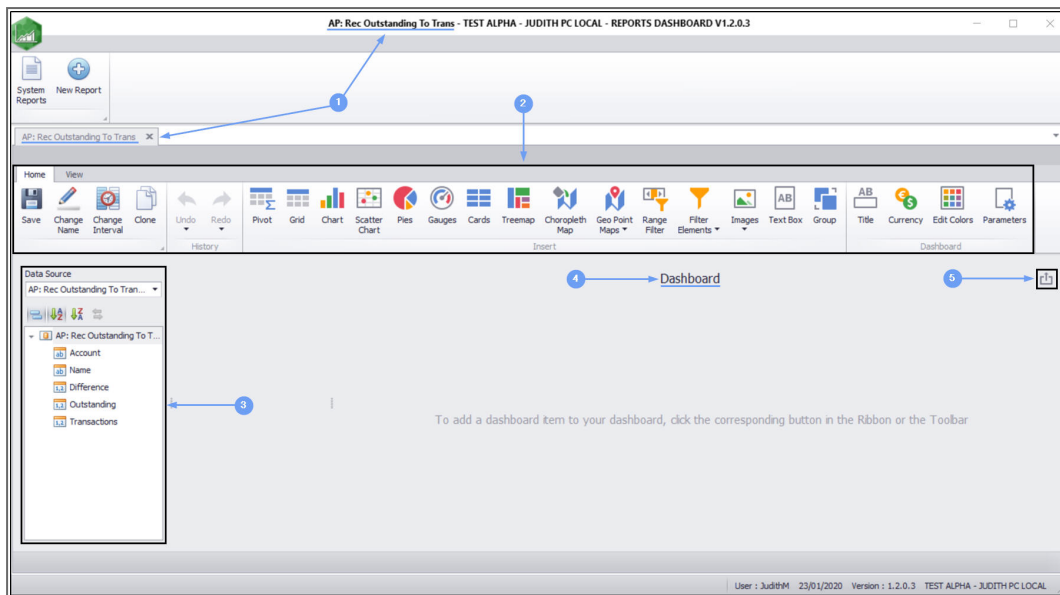
Procurement

Sales

- The **Report Category** field will be populated with the selected category.
- Click on **Save**.



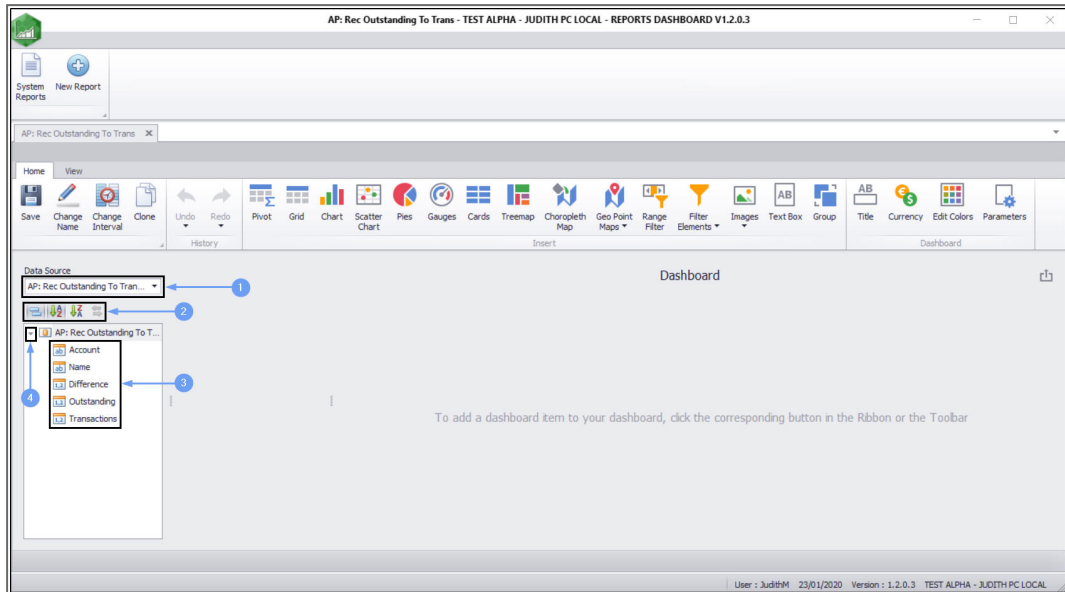
1. A report screen pertinent to the selected report will be displayed.
 - In this example, the **AP: Rec Outstanding To Trans** screen is displayed.
2. A **Ribbon** with different functionality buttons will be displayed.
3. A **Data Source** section with columns pertinent to the selected report will be displayed.
4. A **Dashboard** section for adding dashboard items will be displayed.
5. An **Export To** icon for **exporting data** will be displayed.



DATA SOURCE SECTION

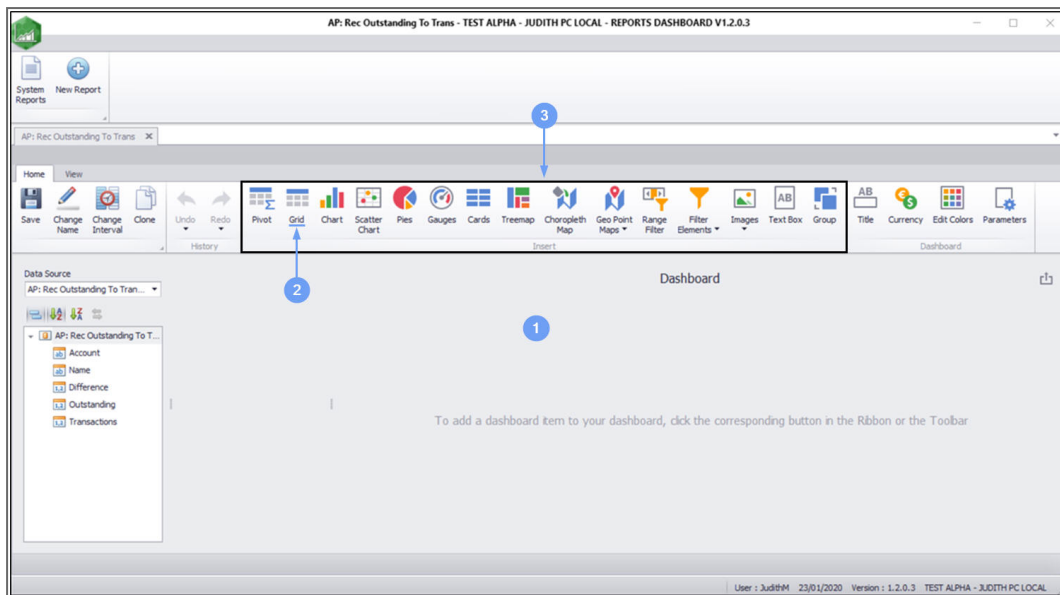
1. The report selected in previous steps will be displayed as the data source.
2. Each icon displayed in the **Data Source** section has its own functionality. You can use the icons to:
 - Group fields by type
 - Sort columns from A to Z
 - Sort columns from Z TO A
 - Change the data source for the dashboard items
 - **Note:** If you hover over an icon, the icon description will be displayed.
3. The **columns** pertinent to the selected report will be displayed in this section.
4. Use the **tree view node** to expand / collapse the columns of the selected report.
 - **Note:** The **tree view node** will be expanded by default, displaying all the columns pertinent to the selected report. If you do not wish to view

the columns, click on the **tree view node arrow** to collapse the **tree view**.

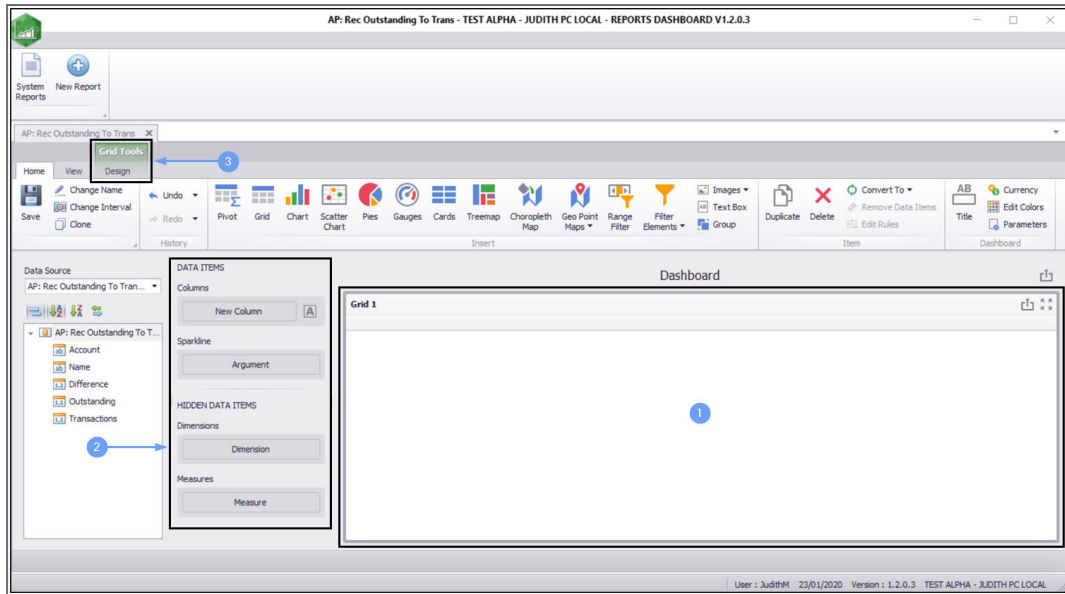


ADD A DASHBOARD ITEM

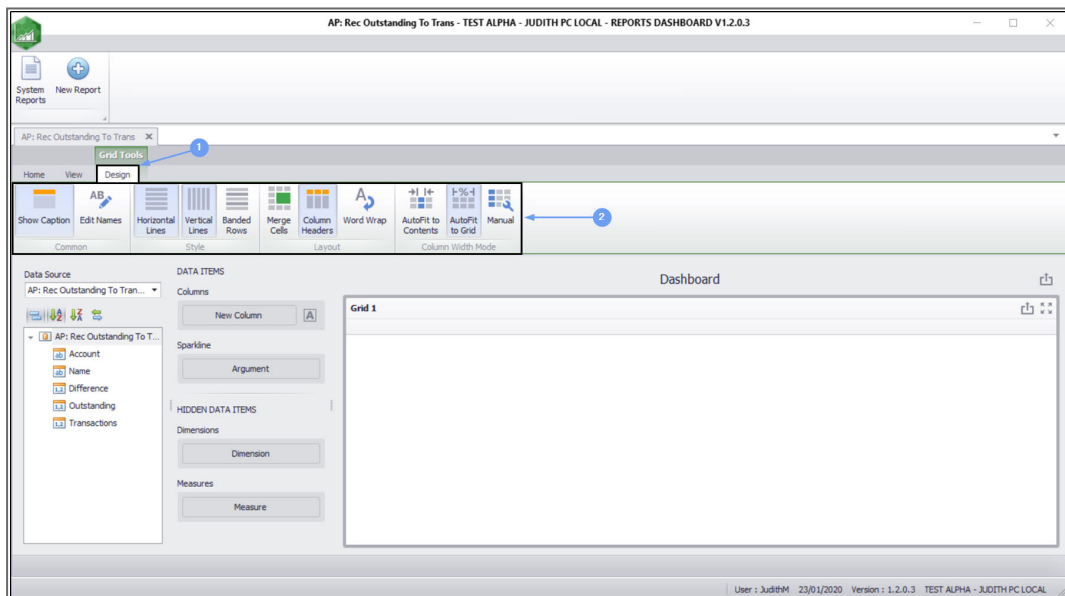
1. To add an item to the dashboard,
2. Click on the type of control required eg Grid, Chart
3. on the **Ribbon** (use the ' **Insert** ' ribbon group buttons).
 - In this image, a **Grid** has been selected.
 - **Note:** For more information on different types of controls, refer to the **Control Types and Meaning Of Their Data Items** manual.



1. The selected control type (dashboard item) will be added to the ***Dashboard***.
 - In this image, a ***Grid*** has been added to the ***Dashboard***.
2. A ***Data Items*** section pertinent to the selected control type (dashboard item) will also be added to the ***Dashboard***.
 - In this image, a ***Data Items*** section pertinent to the ***Grid*** has also been added to the ***Dashboard***.
3. New ***tools*** pertinent to the selected control type (dashboard item) will be added to the ***Ribbon***.
 - In this image, ***Grid Tools*** have been added to the ***Ribbon***.

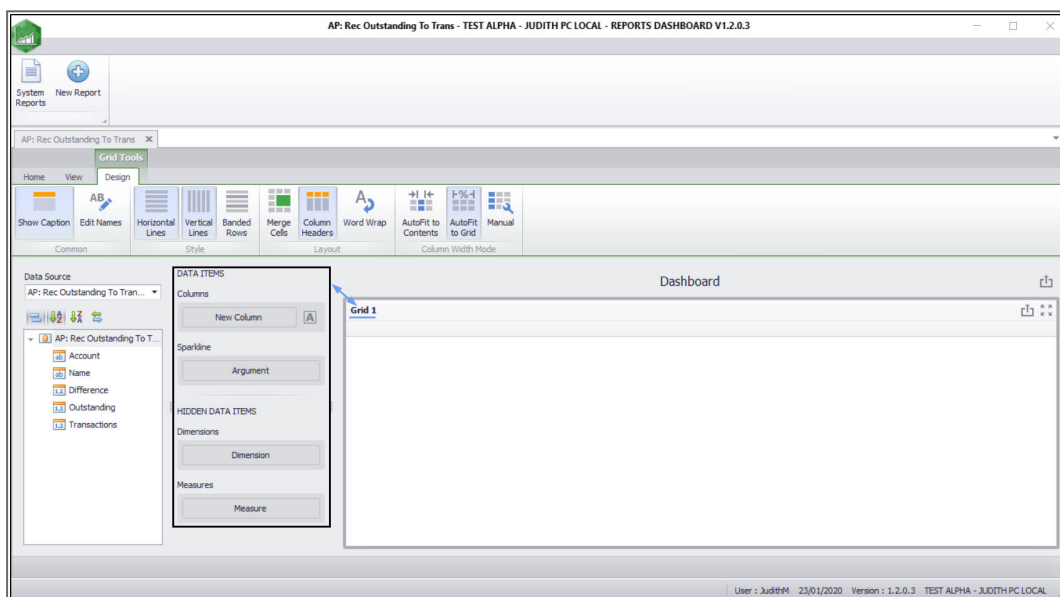


1. Click on the newly added **Tools** (tab) on the **Ribbon**.
 - In this image, the **Design** tab has been selected.
2. **Ribbon** buttons pertinent to the selected tab will be displayed. You can use these to make changes if required to the selected dashboard item.



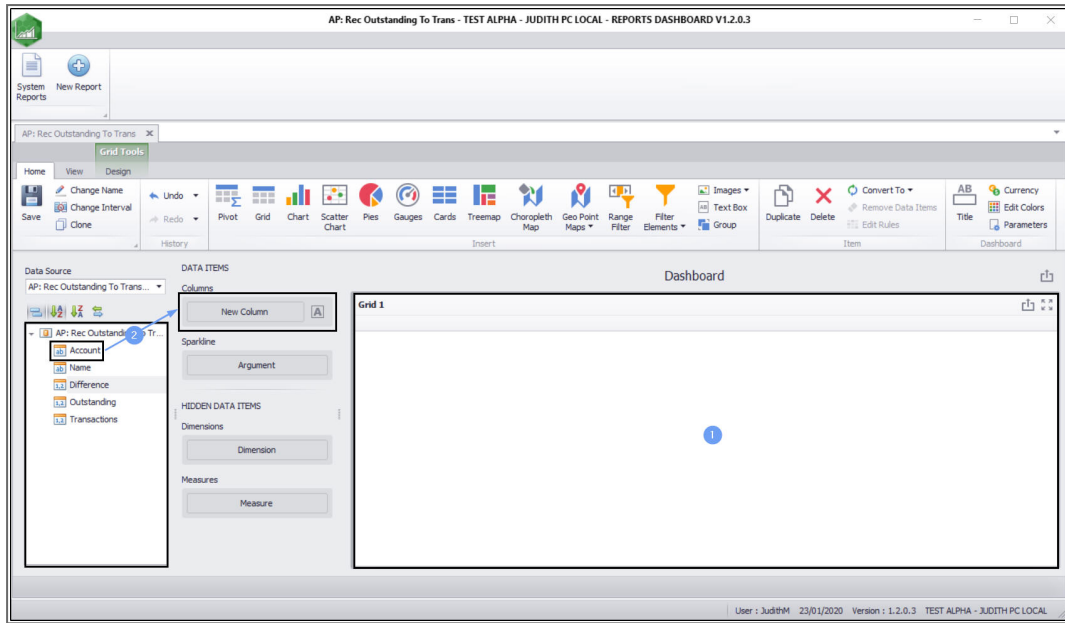
DATA ITEMS SECTION

- The **Data Items** displayed in this section are pertinent to the type of control (dashboard item) selected in the previous steps.
 - In this image, the **Data Items** displayed in this section are pertinent to the **Grid** control selected previously.
 - Note:** For more information on data items for different control types, refer to the [Control Types and Meaning Of Their Data Items](#) manual.

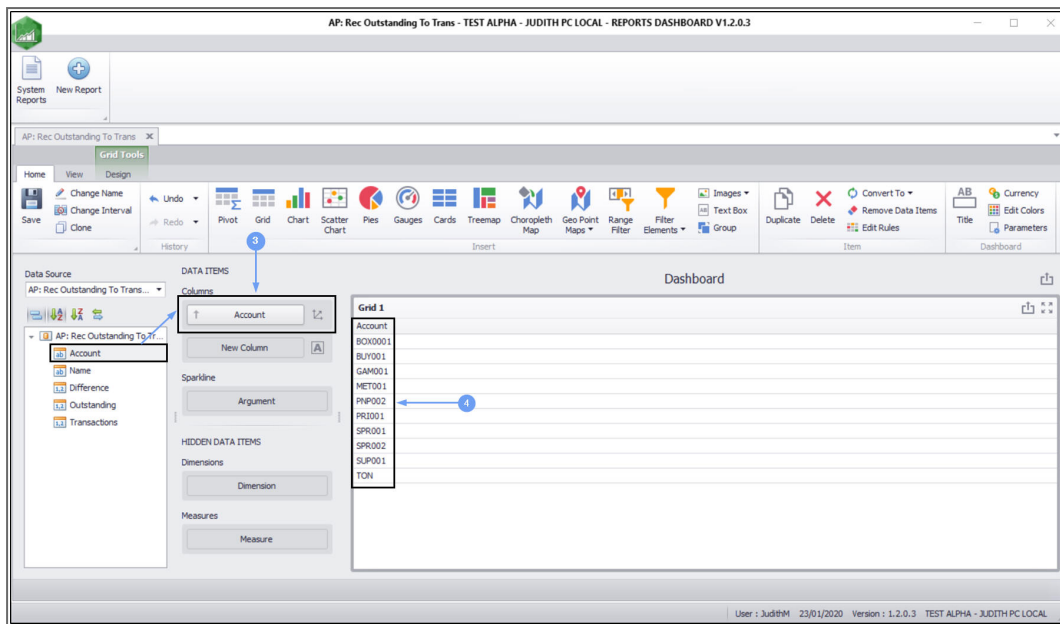


ADDING DATA TO A DASHBOARD ITEM

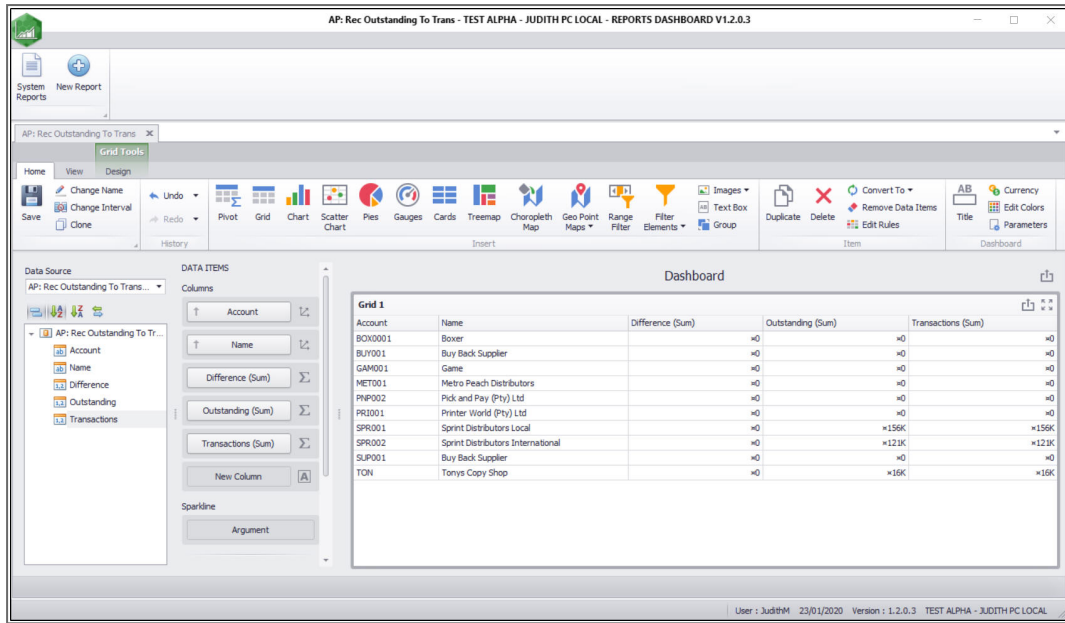
- To add data to the relevant control type (dashboard item) selected,
- drag **columns** from the **Data Source** section and



3. drop the required **columns** on to the relevant **data items** in the **Data Items** section.
 - In this image, **Account** has been dragged from the **Data Source** section and dropped in **Columns** in the **Data Items** section.
4. The data of the **column** dropped in the **Data Items** section will be displayed in the selected control type (dashboard item).



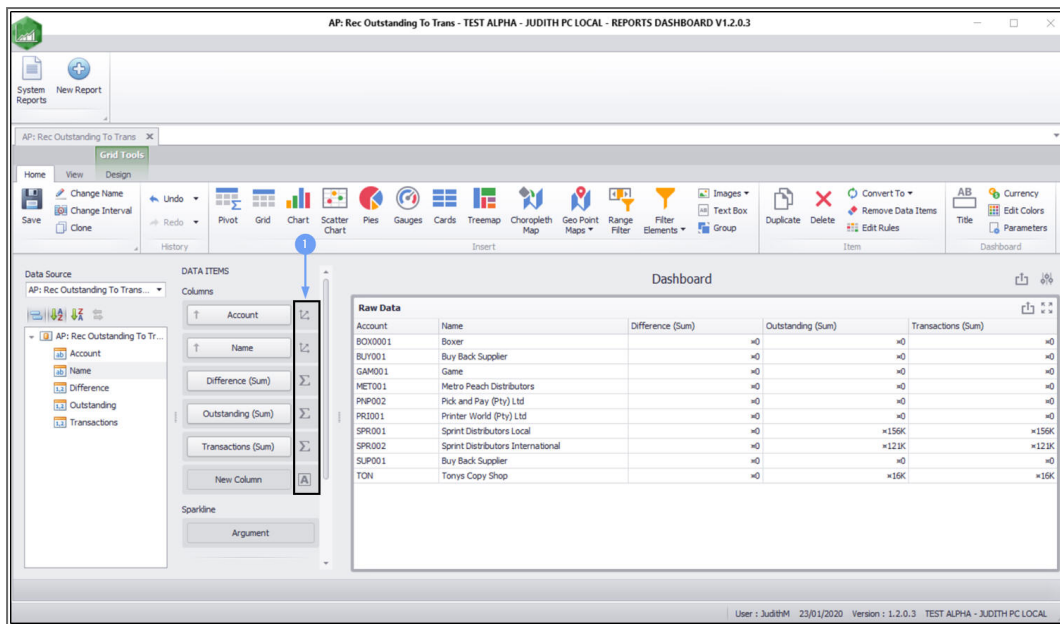
- Repeat the previous steps to add more data to the selected control type (dashboard item).
 - **Note:** If you wish to remove a **column** from the **Data Items** section, do the opposite i.e. drag the relevant column from the **Data Items** section and drop it in the **Data Source** section.



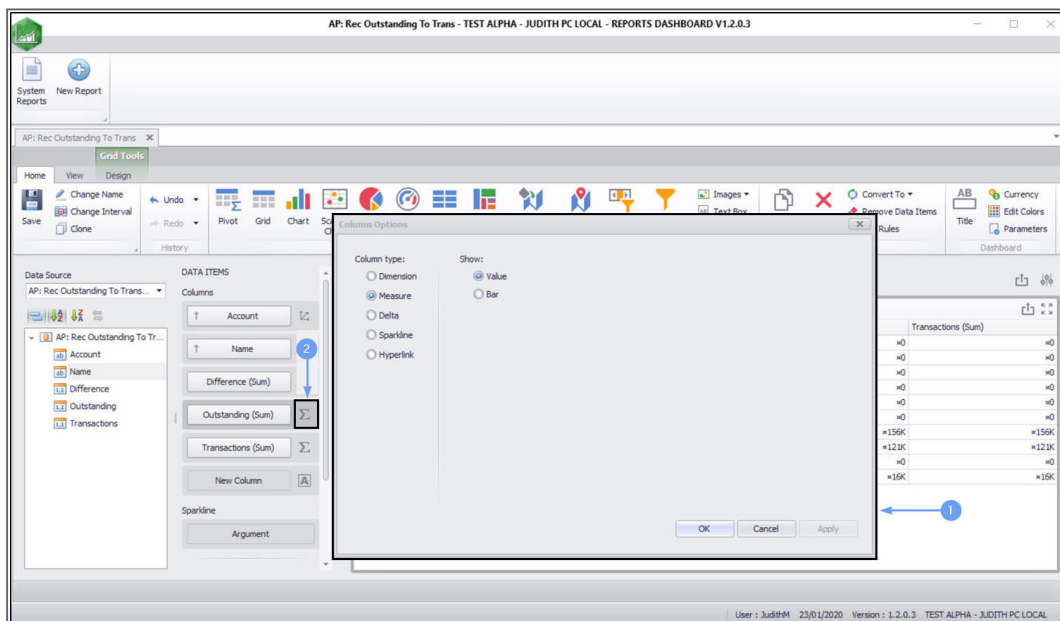
ADDITIONAL DATA ITEMS OPTIONS

You can change how data will be displayed for a particular data item in the dashboard item.

1. To do this, in the **Data Items** section, click on an icon on the data item you wish to change.



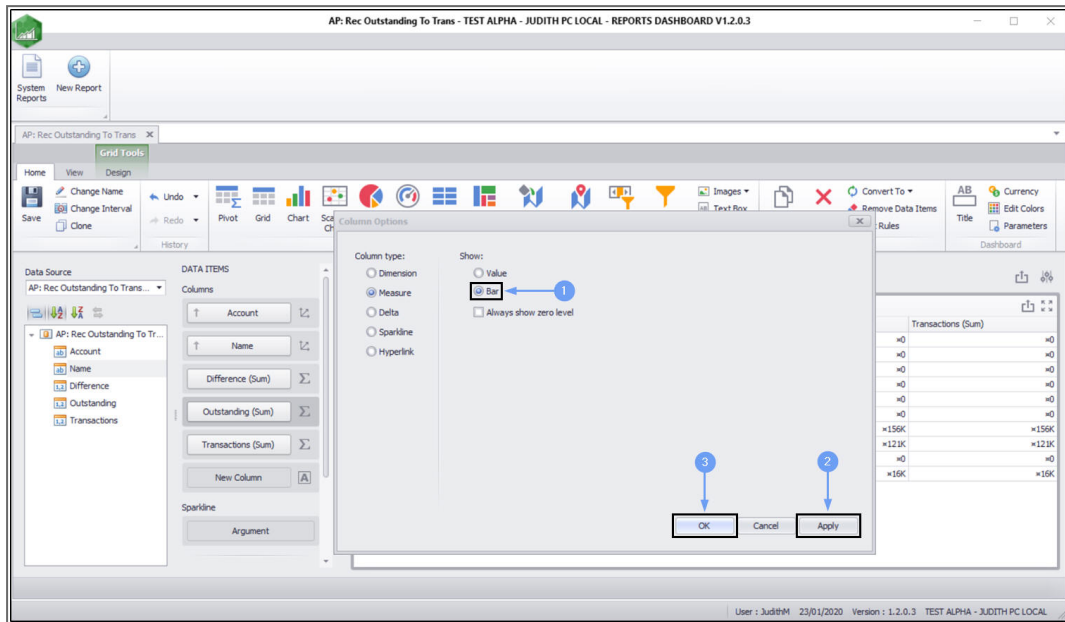
1. A **Column Option** screen will be displayed.
2. **Note:** In this image, the **icon** on the **Outstanding** data item was selected.



1. Make the desired changes.
2. Click on **Apply**.

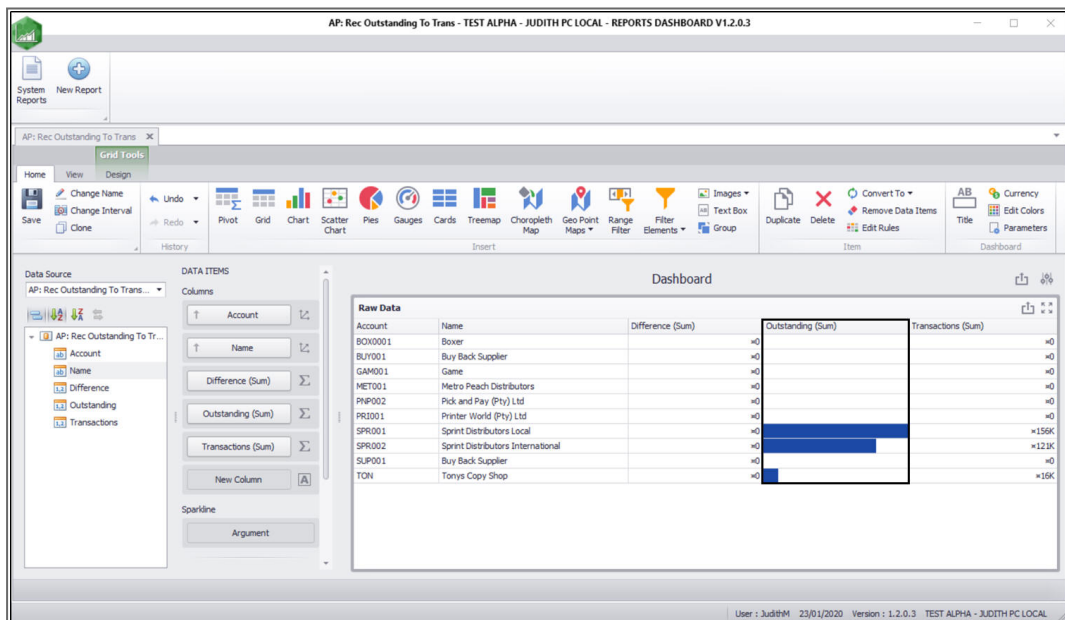
3. Click on **OK**.

- In this image, **Bar** has been selected.

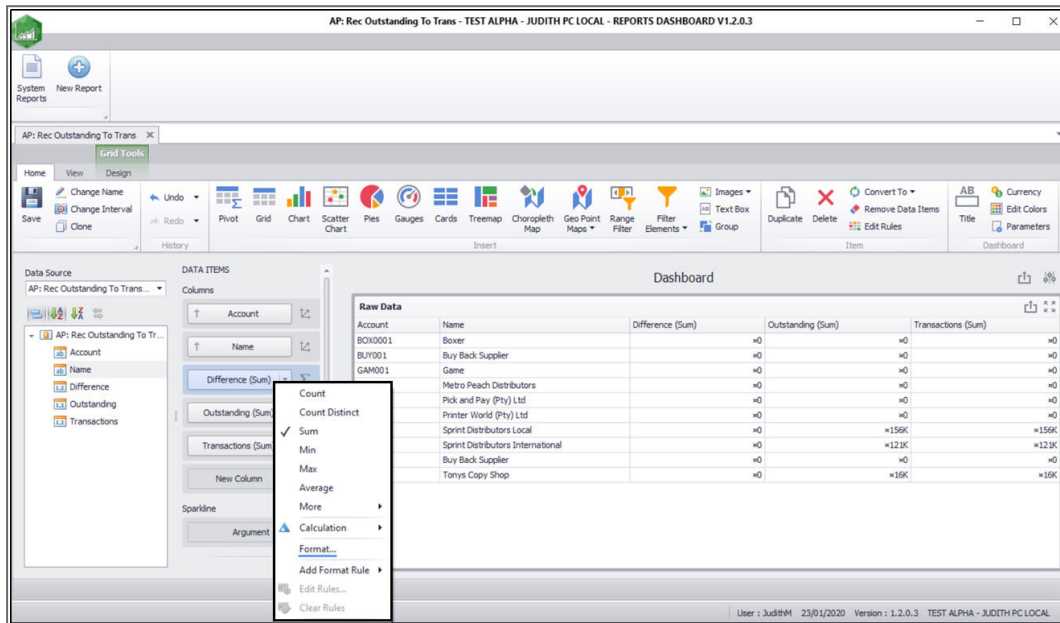


The changes will be applied.

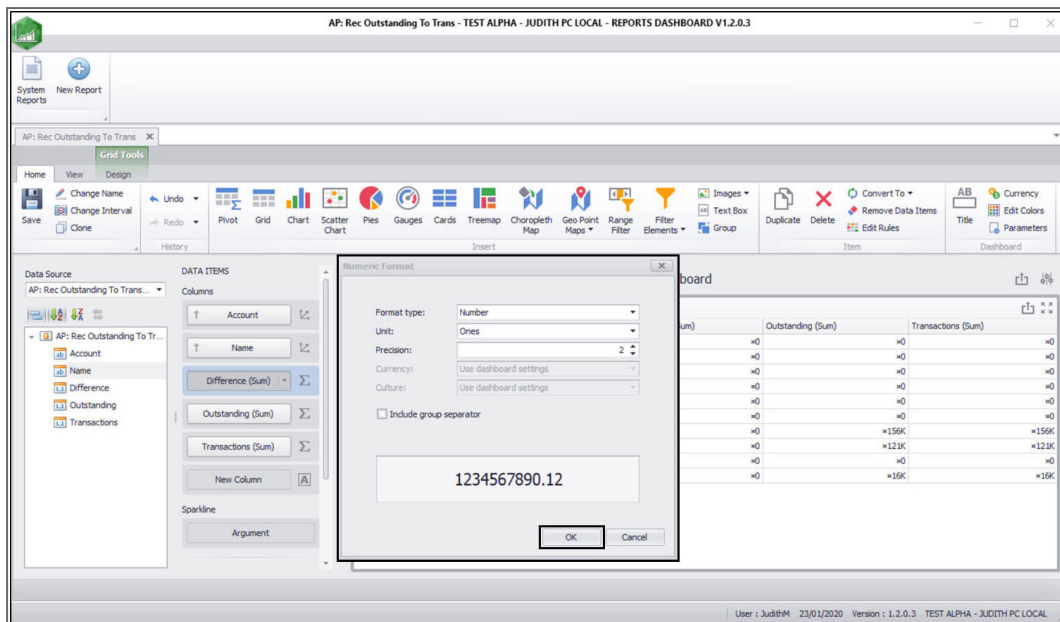
- In this image, a **bar graph** is now displayed in the **Outstanding (Sum)** column.



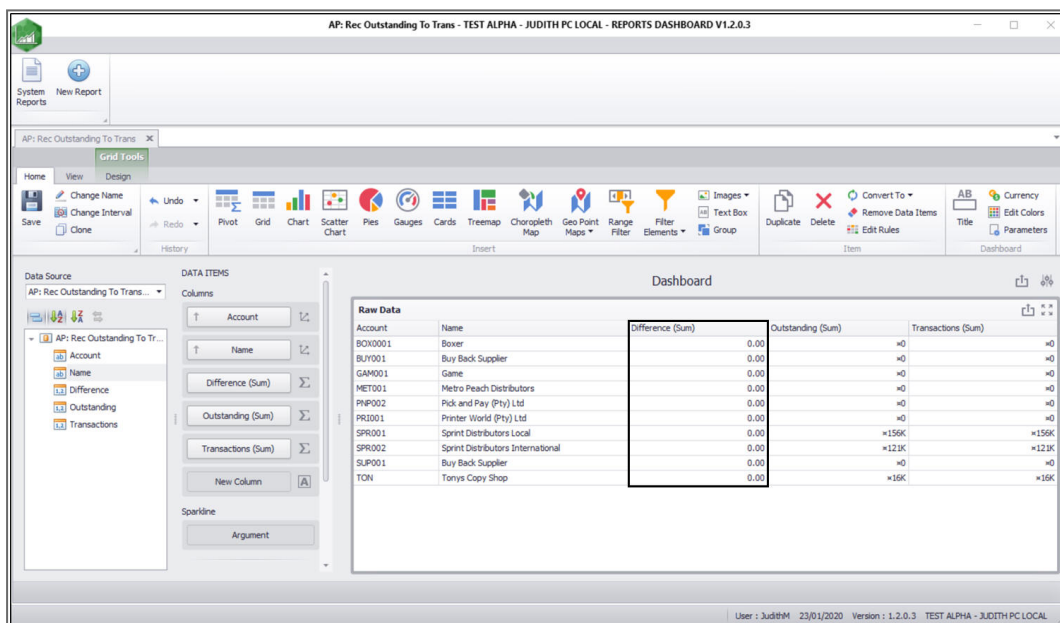
- Right click on any of the data items.
- A **menu** with additional functions pertinent to the selected data item will be displayed.
- Select the required function.
 - In this image, **Format** has been selected and the required changes have been made.



- Make the required changes.
- Click on **OK**.



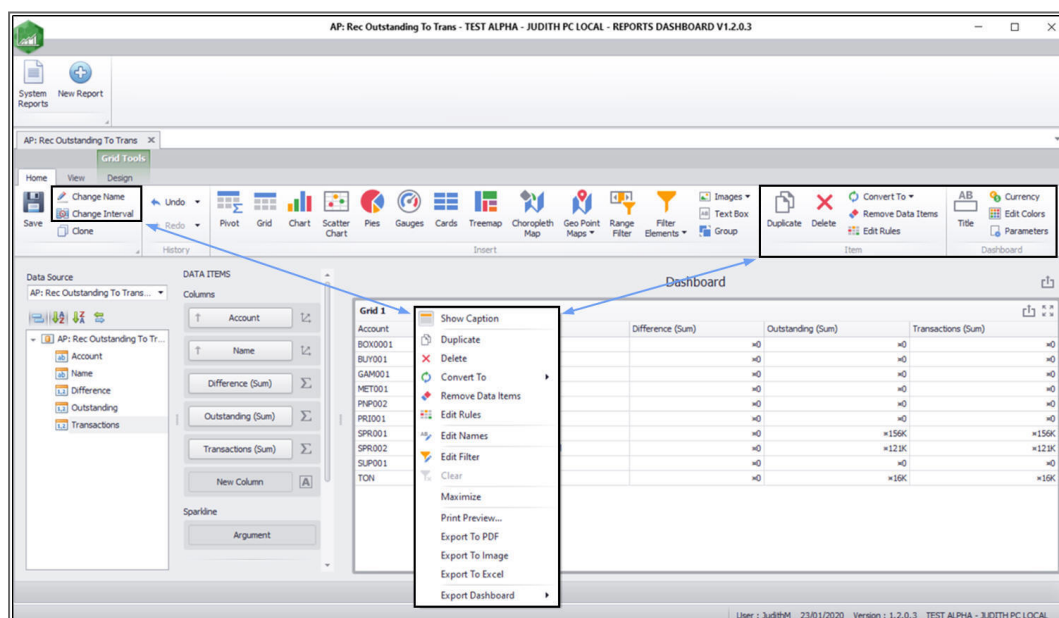
- The changes will be applied to the selected data item.



ADDITIONAL DASHBOARD ITEM OPTIONS

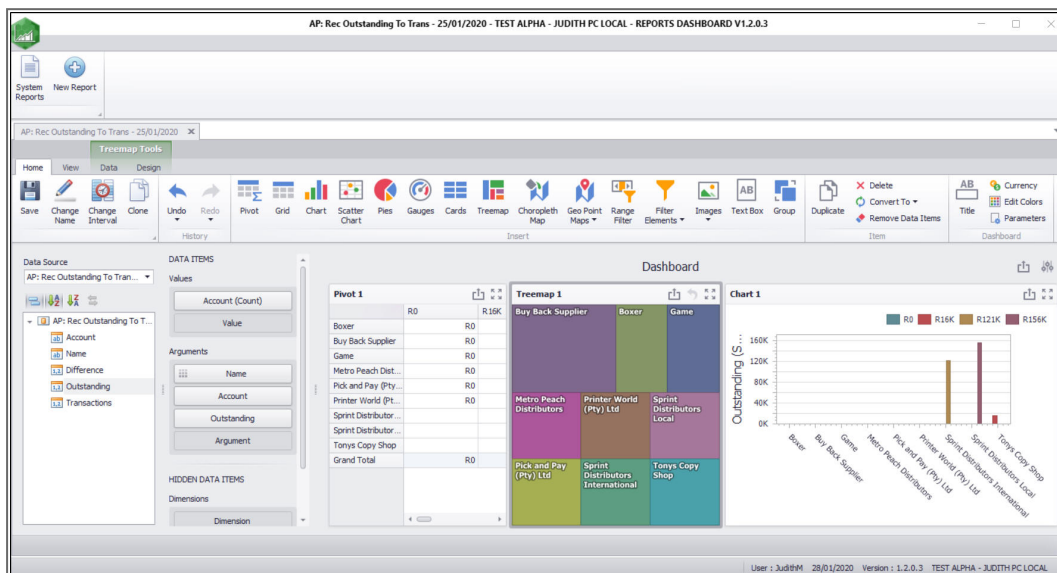
- If you **right click** on the dashboard item **column headers** or **title**, a **menu** with additional options will be displayed.

- You can also access additional options from the **Ribbon**.
- You can perform any of the actions listed below, if required, using the additional options;
 - Show or hide dashboard item title
 - Duplicate a dashboard item
 - Delete a dashboard item
 - Convert a control type
 - Remove data items from a dashboard item
 - Rename dashboard item title and or columns
 - Edit a dashboard item filter
 - Clear a dashboard filter
 - Print preview a dashboard item
 - Export To.....
 - Change dashboard report title
 - Set default currency
 - Edit dashboard colours
 - Change report name
 - Change report interval



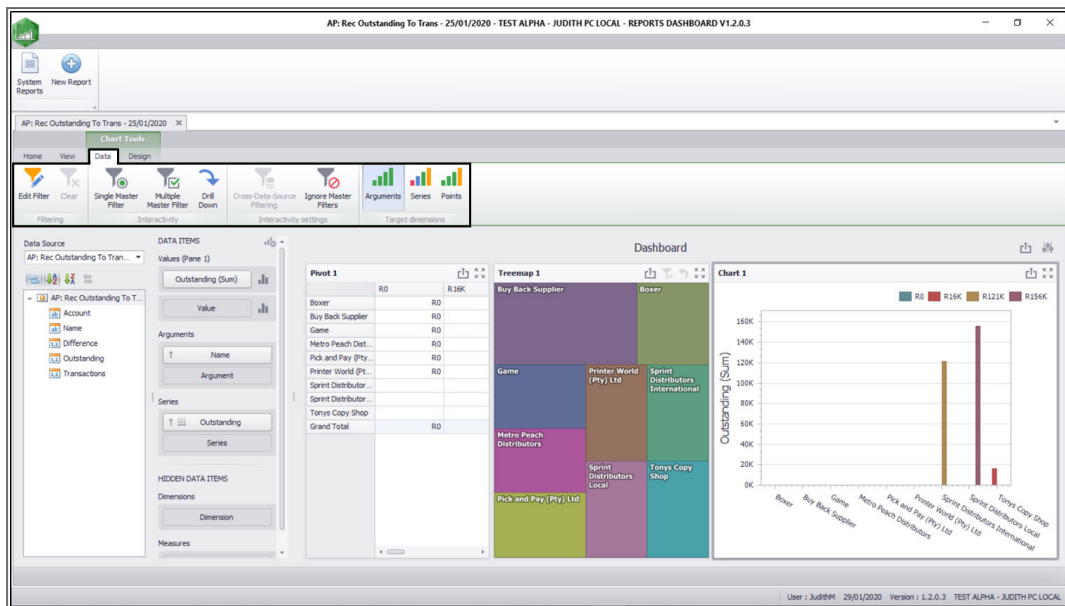
ADD ADDITIONAL DASHBOARD ITEMS

- You can add multiple dashboard items to the dashboard by following steps outlined in the [Add A Dashboard Item](#) topic.



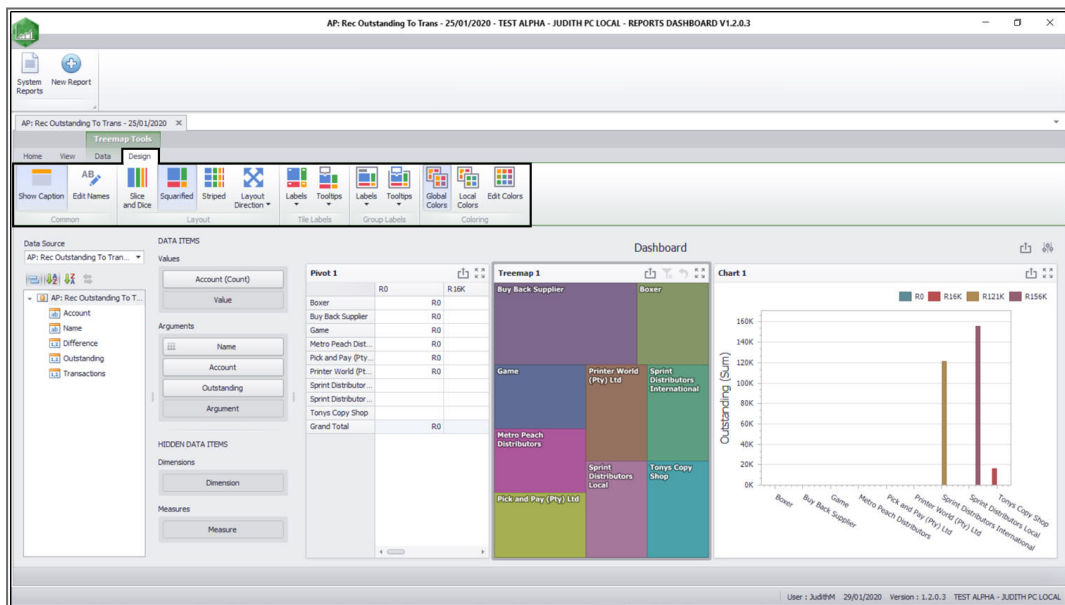
SETTING UP FILTERS ON A REPORT

- You can define how data will be filtered on a report by making use of the **Data** options on the **Ribbon**.
- For more information, refer to the [Configuration of Report Filters](#) manual.



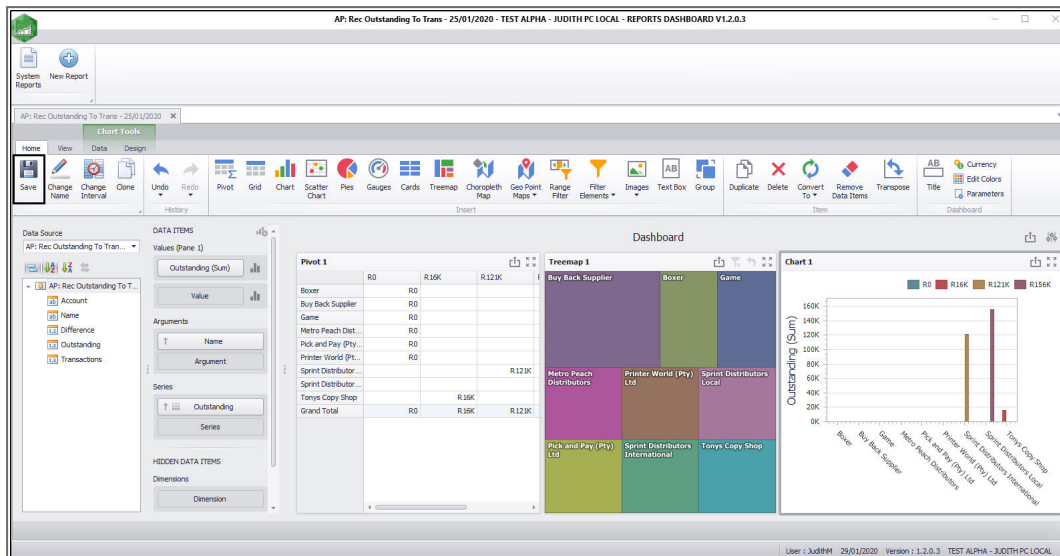
DASHBOARD DESIGN

- You define how you want dashboard items on a report to look visually by making use of the **Design** options on the **Ribbon**.
- For more information, refer to the **Dashboard Design** manual.

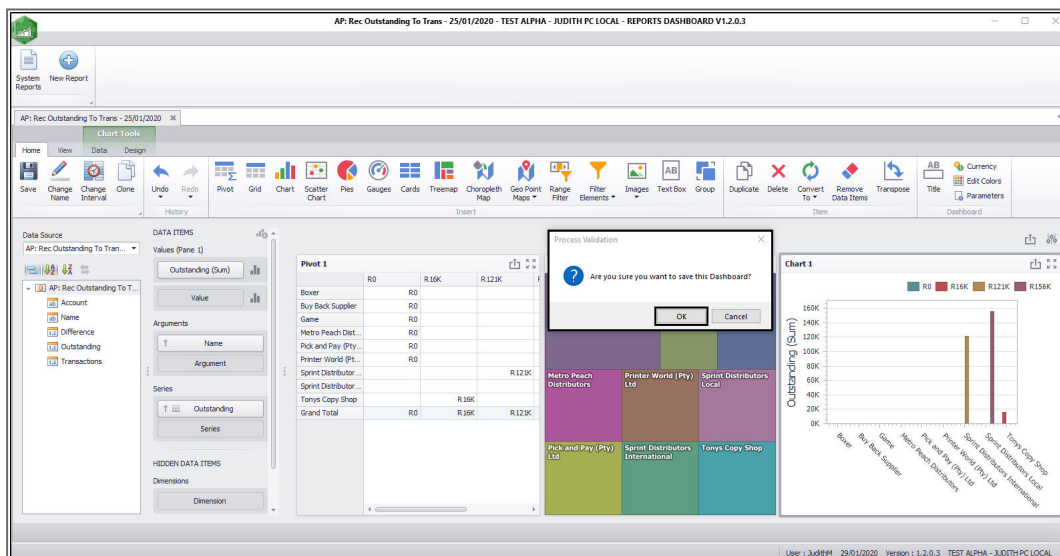


SAVE REPORT

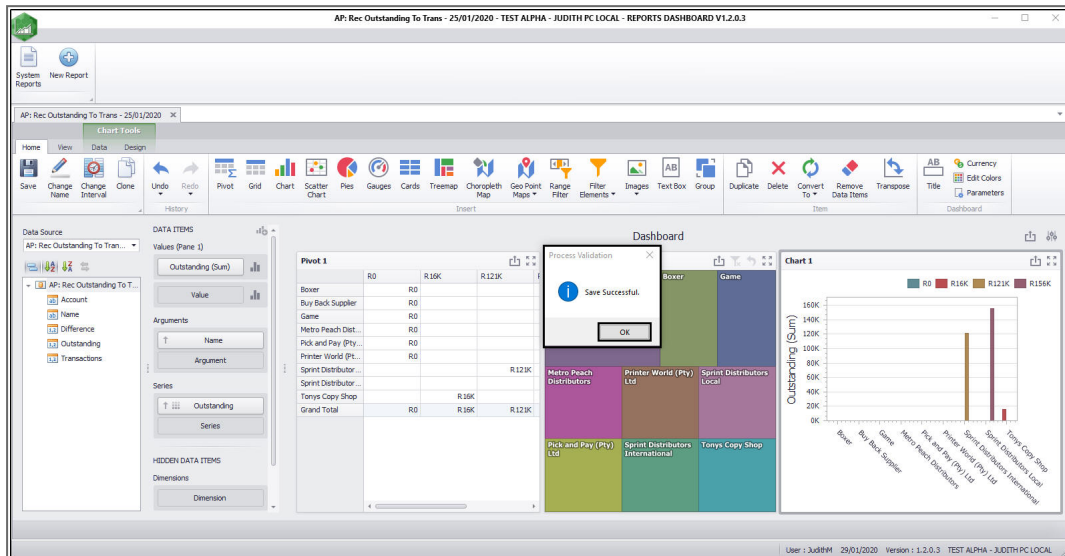
- When you are done, click on **Save**.



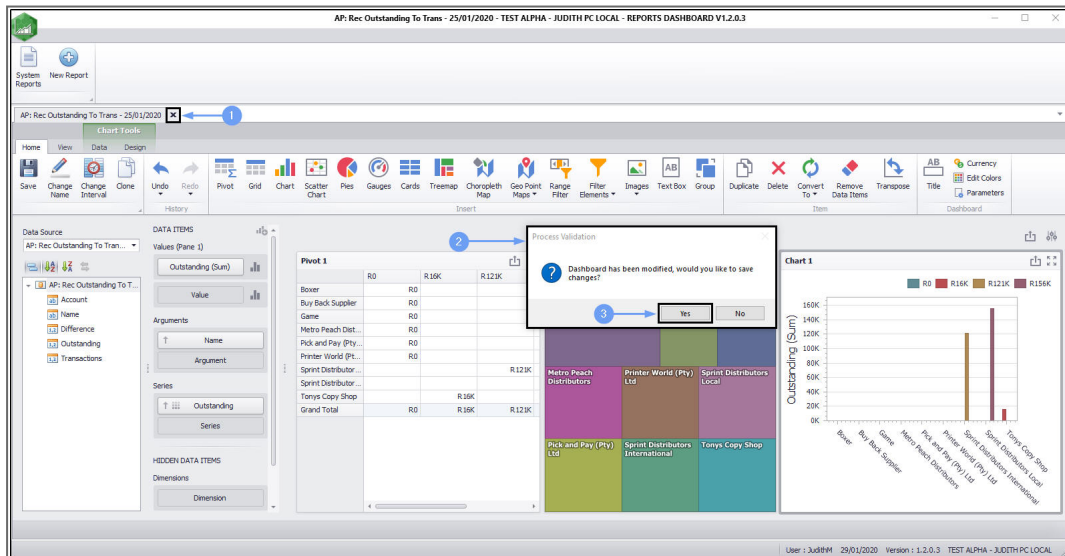
- A **Process Validation** message will pop up asking you;
 - Are you sure you want to add this Dashboard?**
- Click on **Ok**.



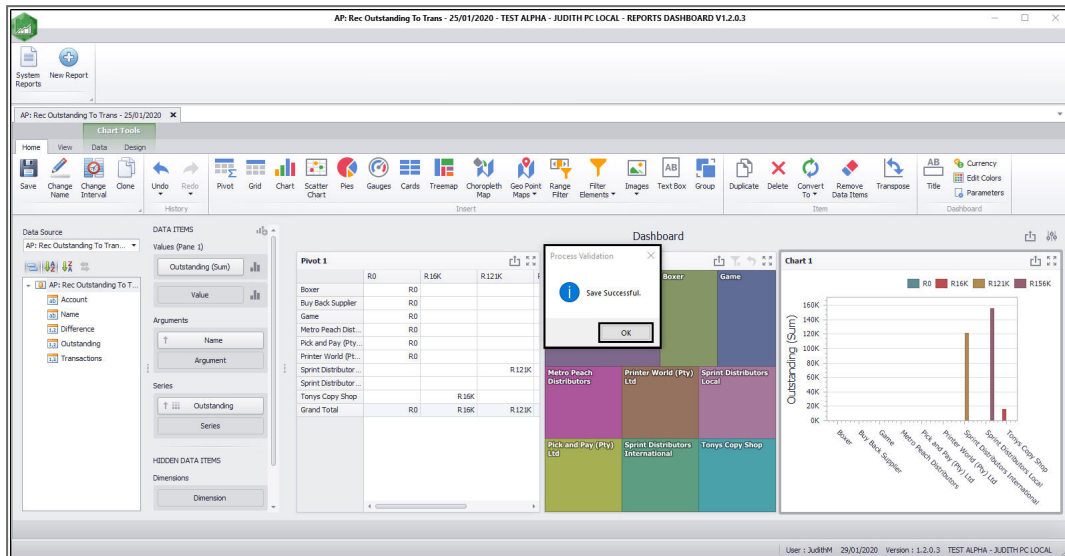
- A **Process Validation** message will pop up telling you;
 - *Save successful.*
- click on **Ok.**



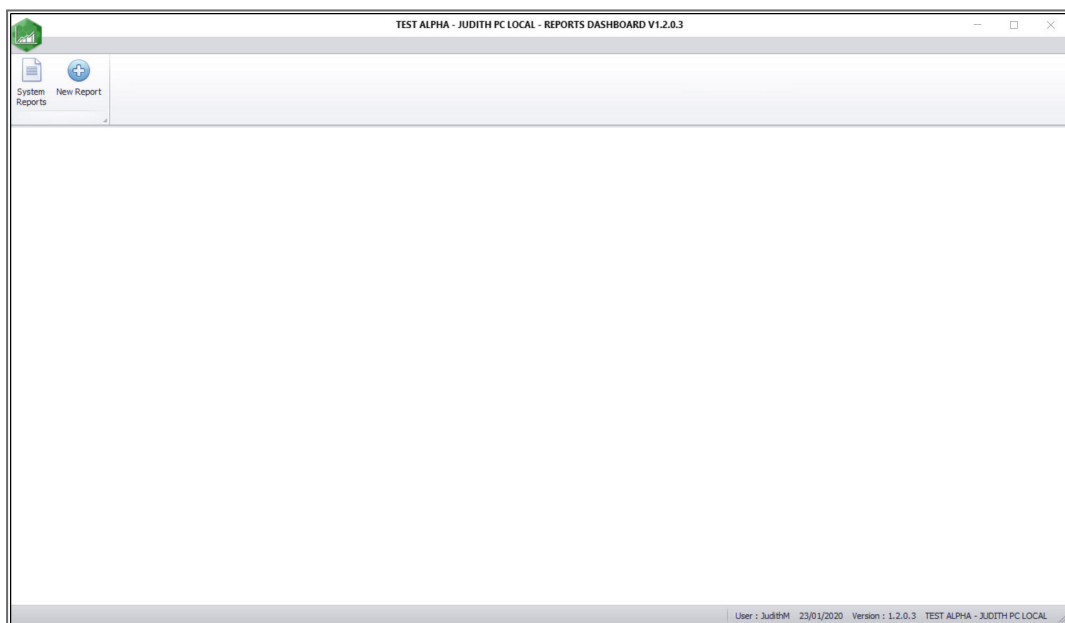
1. Close the report tab to exit the screen.
2. A **Process Validation** message will pop up asking you;
 - *Dashboard has been modified, would you like to save changes?*
3. Click on **Yes.**



- A **Process Validation** message will pop up telling you;
 - *Save successful.*
- Click on **Ok**.



- The screen will be closed.
- If you wish, you can now go and **view the report**.



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