

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 Realtime.

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

Access: Reports Dashboard Icon > Log In

The *Reports Dashboard* application will open.

ADD NEW REPORT

- TEST ALPHA JUDITH PC LOCAL REPORTS DASHBOARD V1.2.0.3 Ð ∓× ρ≁ 🛔 Call Centre × 🔒 Meters × A Contracts × 🔒 MIF × 👬 CRM × 👗 Sales × 👗 Service *
- 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.

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		User : JudithM 23/01/2020 Version : 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

- 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 <u>Configurator Sys</u>-<u>tem Reports</u> for them to appear in this screen.



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			User : JudithM 23/01/20	20 Version : 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

- 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**).



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	User : JudithM 23/01/2020 Version : 1.2.0.3 TE	ST ALPHA - JUDITH	PCLOCA	L /

- 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 <u>not</u> 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'.

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

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- 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.



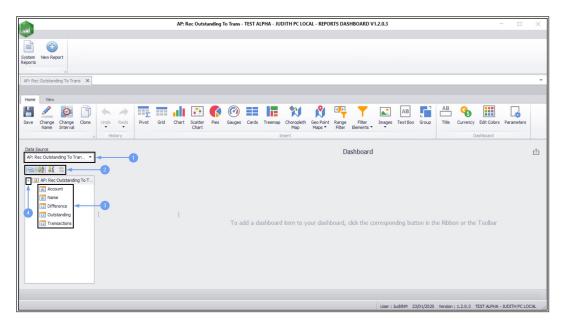
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Image:	*		To add a dashboard item to your dashboard, click the corresponding button in the Ribbon or the Toobar
			User : JudithM 23/01/2020 Version : 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

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.



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- 1. The selected control type (dashboard item) will be added to the **Dash**board.
 - 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*.



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- 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.

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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.

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ADDING DATA TO A DASHBOARD ITEM

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



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- 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).



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- 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.



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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.



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

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



- 3. Click on OK.
 - In this image, *Bar* has been selected.

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

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- 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.

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- Make the required changes.
- Click on OK.



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

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ADDITIONAL DASHBOARD ITEM OPTIONS

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



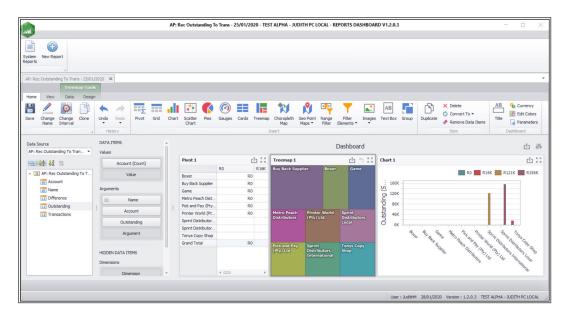
- You can also access additional options from the *Ribbon*.
- You can perform any of the actions listed below, if required, using the additional options;
 - Show or hide dashboard item title
 - Duplicate a dashboard item
 - Delete a dashboard item
 - Convert a control type
 - Remove data items from a 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

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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

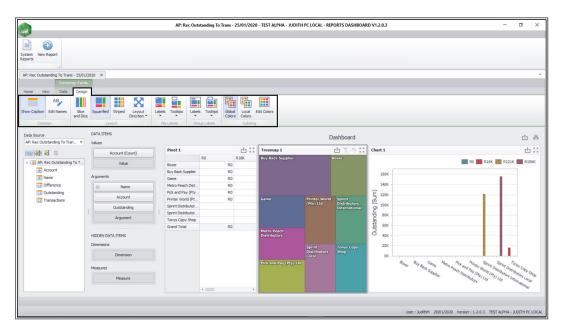
- You can define how data will be filtered on a report by making use of the *Data* options on the *Ribbon*.
- For more information, refer to the Configuration of Report Filters manual.



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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.

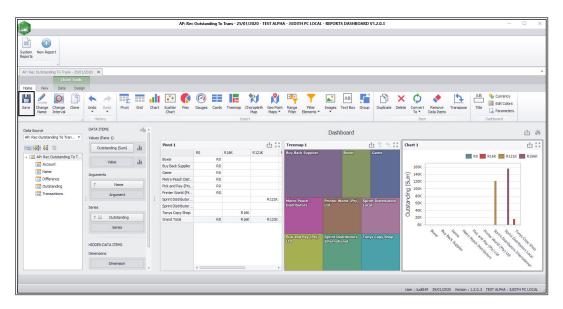


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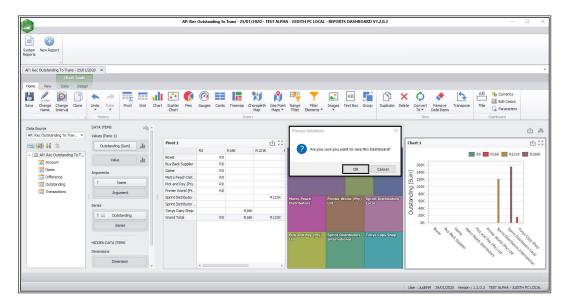


SAVE REPORT

• 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.

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- 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.

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

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

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