

# REPORTS DASHBOARD

## EDIT A REPORT

The **Reports Dashboard** application graphically displays critical business information onto a dashboard which can be viewed in real-time.

In this *Reports Dashboard*, you can also edit an existing report.

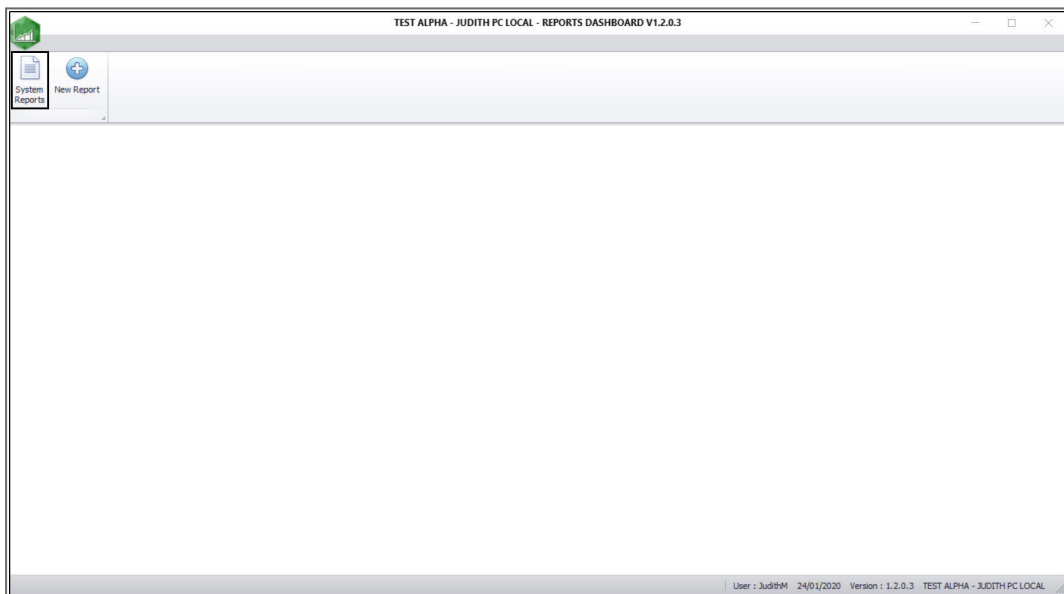
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**Access:** *Reports Dashboard Icon* > [Log In](#)

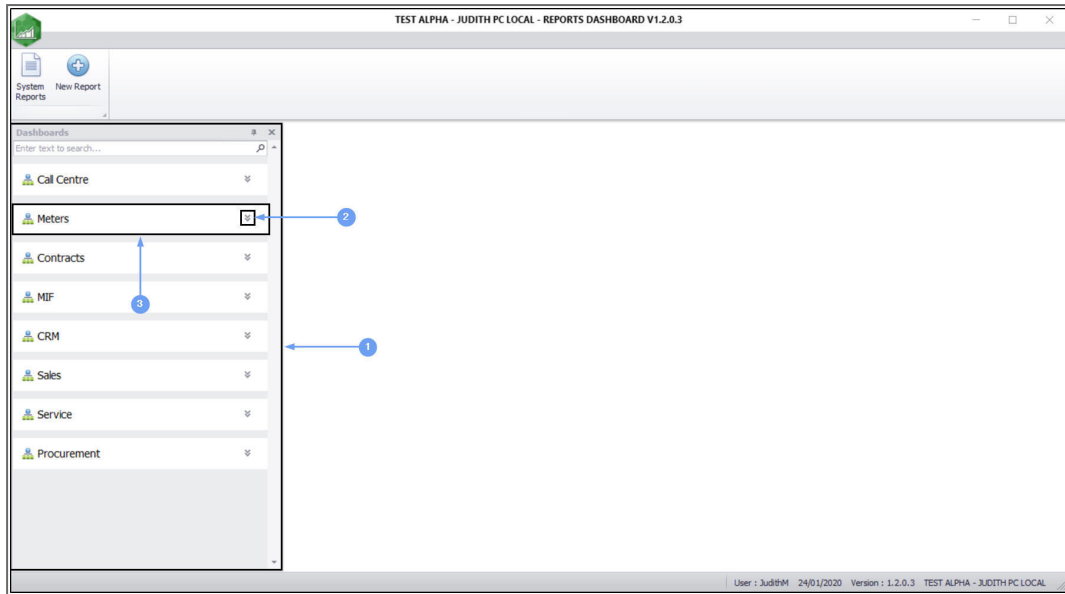
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The *Reports Dashboard* application will open.

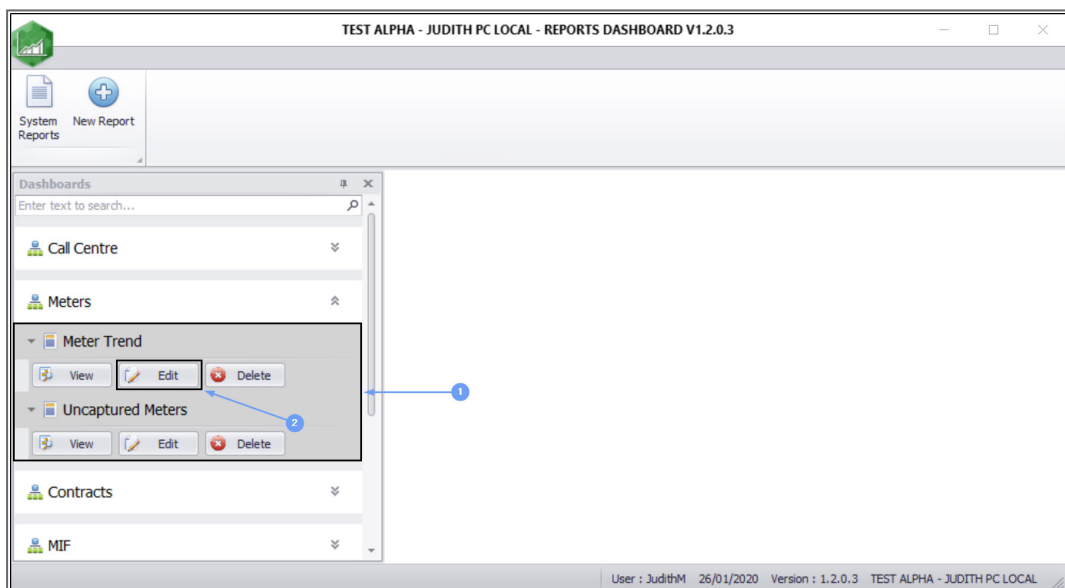
- Click on *System Reports*.



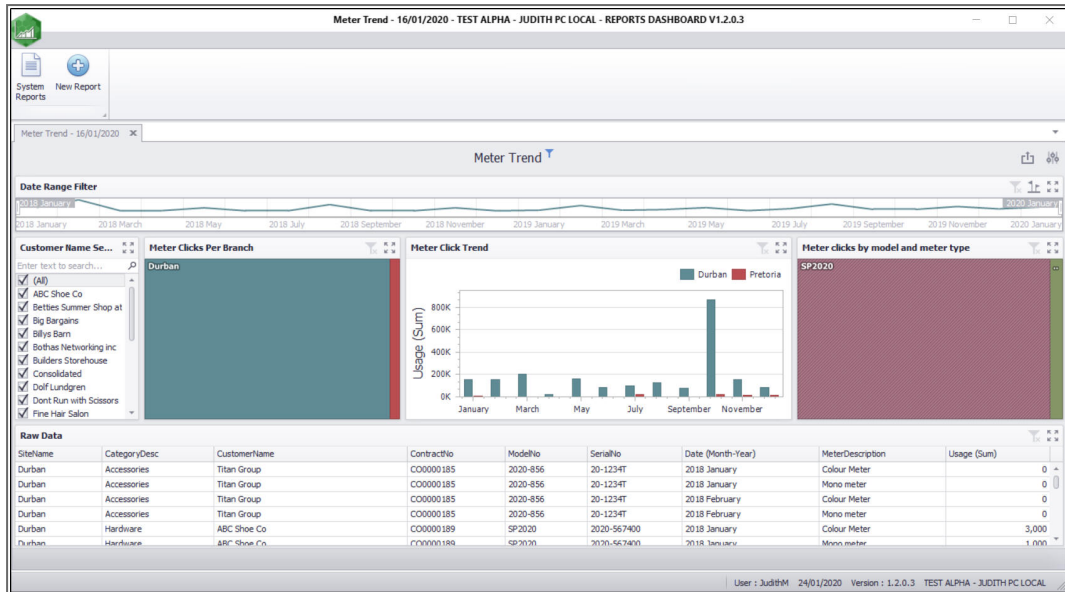
1. The *Dashboard Panel* will be displayed.
2. Click on the *chevron view node* on the
3. *Report Category* with the underlying report you wish to view.
  - In this image, *Meters* has been selected.



1. All the underlying 'active' reports in the selected category will be displayed.
2. Click on **Edit** on the report you wish to edit.



- The selected report will be displayed.
- Data pertinent to the selected report will be displayed.

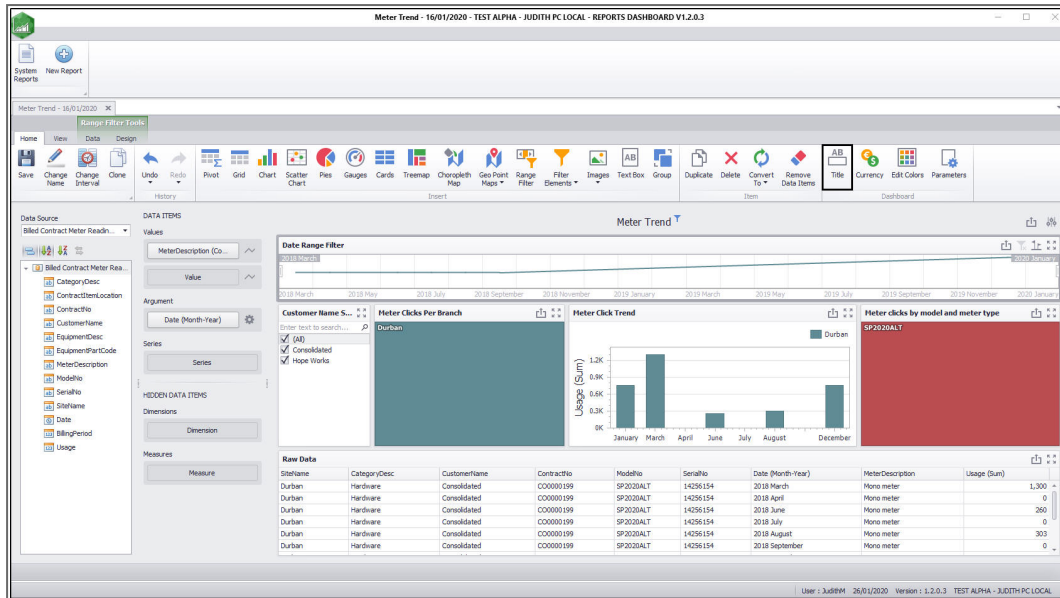


## DASHBOARD RIBBON OPTIONS

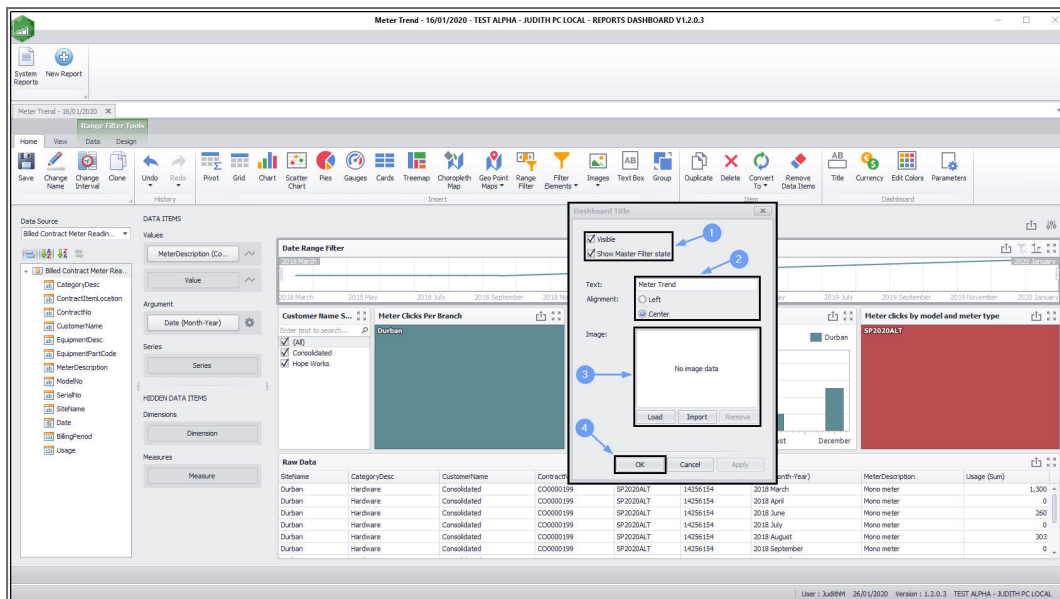
- **Note:** The options explained in this manual are not exhaustive. Refer to the [Related Topics](#) section at the foot of the page for more options.

## CHANGE DASHBOARD TITLE

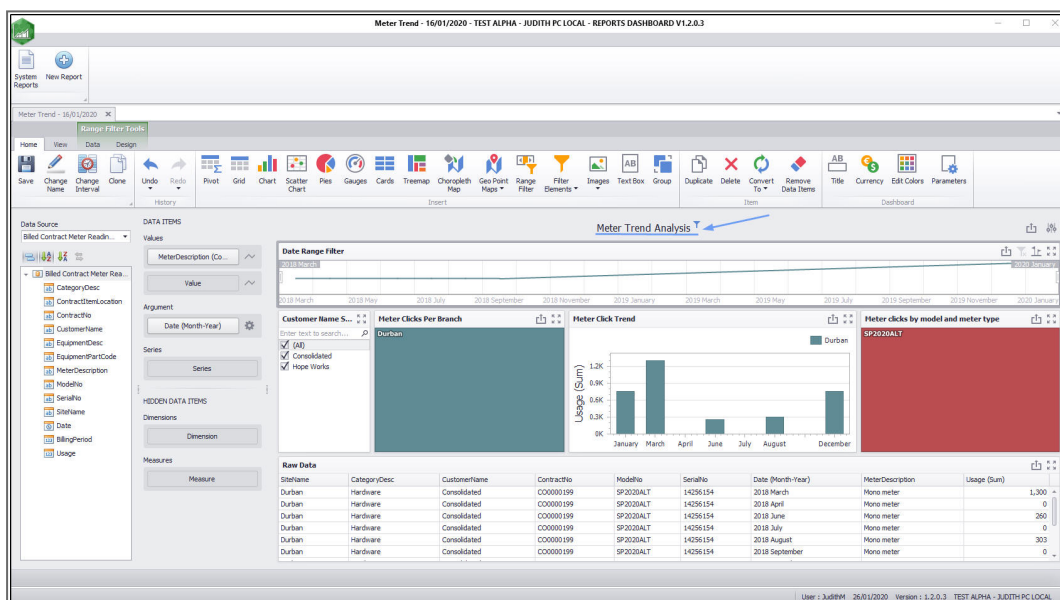
- Click on **Title**.



- The ***Dashboard Title*** screen will be displayed.
  1. Select an option you wish to be visible on the dashboard title.
  2. Edit the Title text if required and select how the title will be aligned on the dashboard.
  3. Load an image if you would like an image to be displayed as part of the dashboard title.
  4. Click on **OK**.

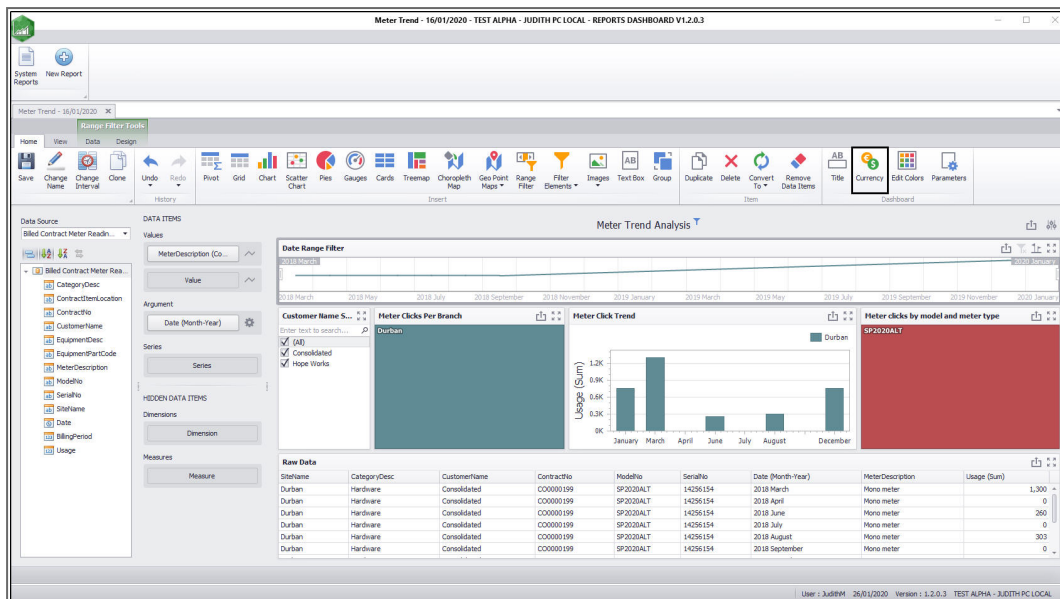


- The changes will be applied to the Dashboard **Title**.

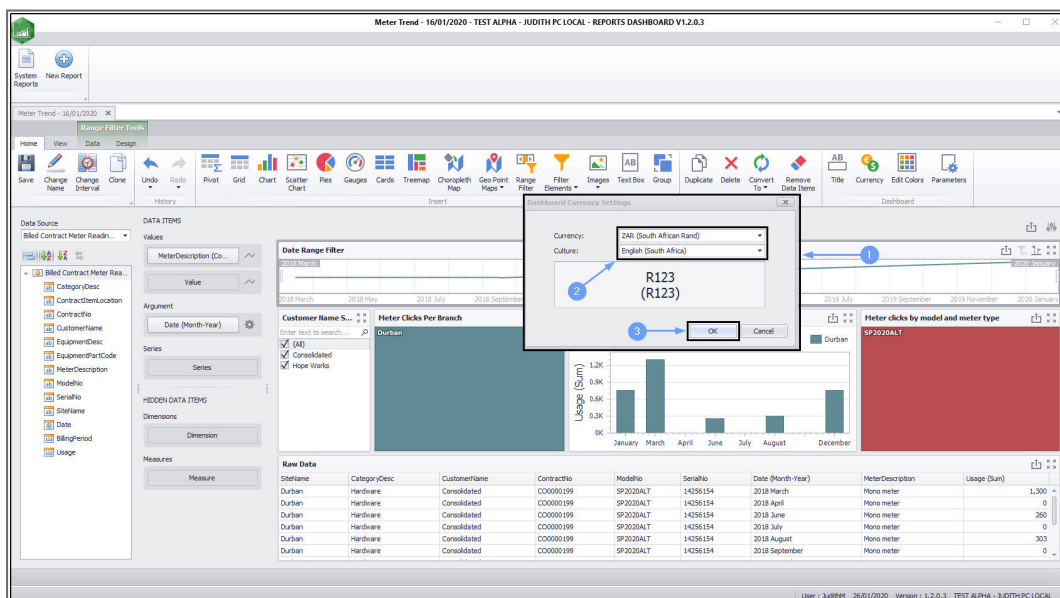


## SET DEFAULT CURRENCY

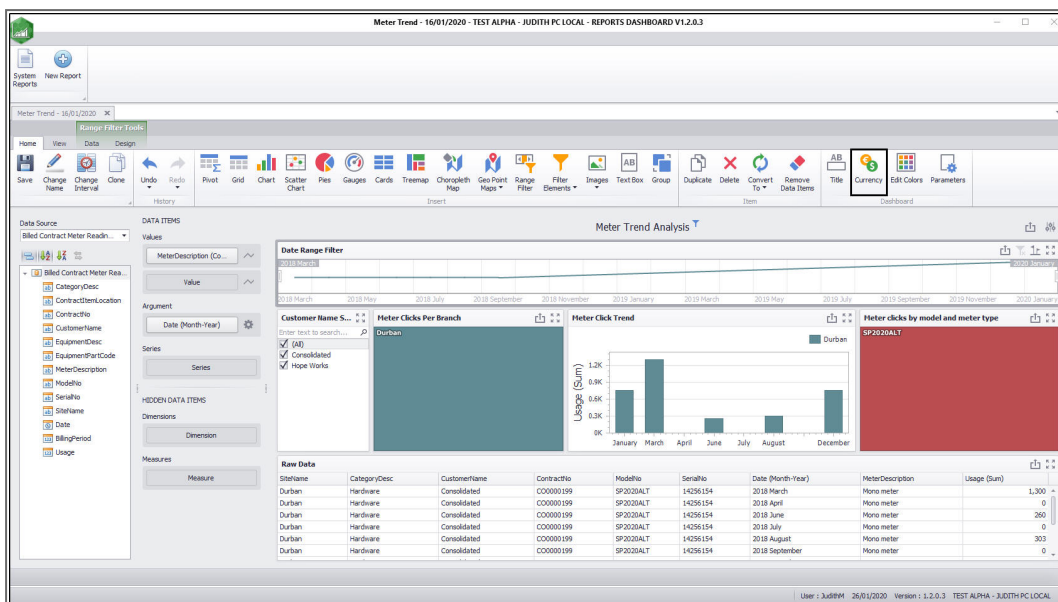
- Click on **Currency**.



1. The ***Dashboard Currency Settings*** screen will be displayed.
2.
  - ***Currency:*** Click on the drop-down arrow and select the applicable currency.
  - ***Culture:*** Click on the drop-down menu and select the applicable culture.
3. Click on ***OK***.

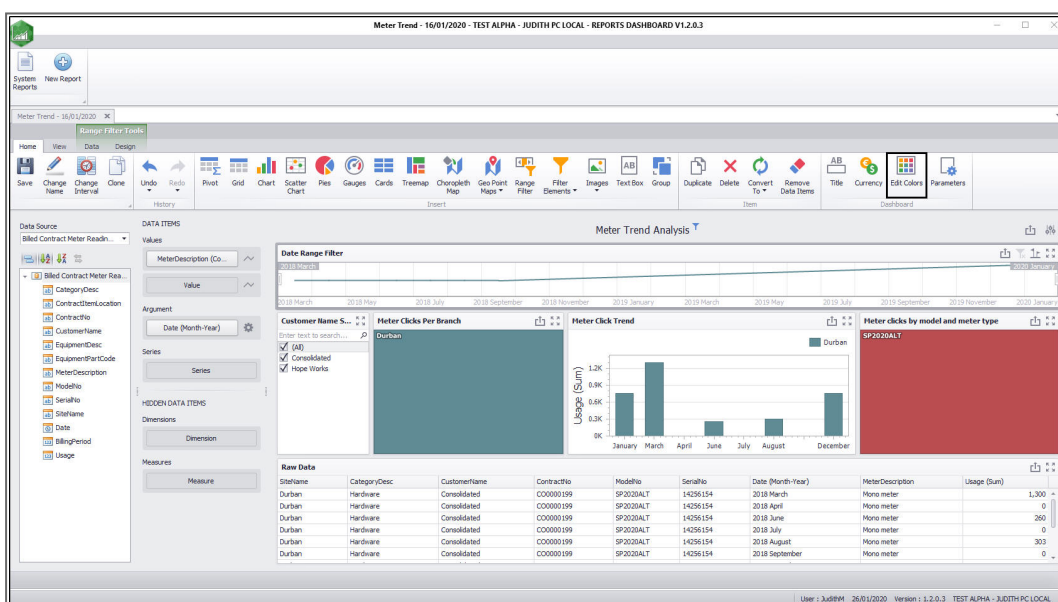


- The **Dashboard Currency Settings** screen will be closed.

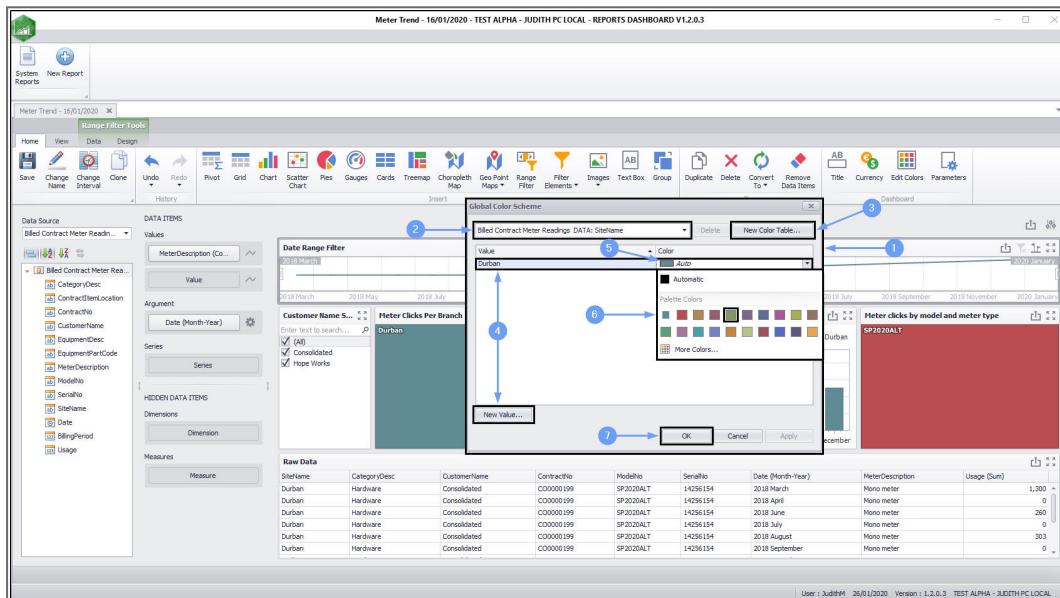


## EDIT DASHBOARD COLOURS

- Click on **Edit Colours**.

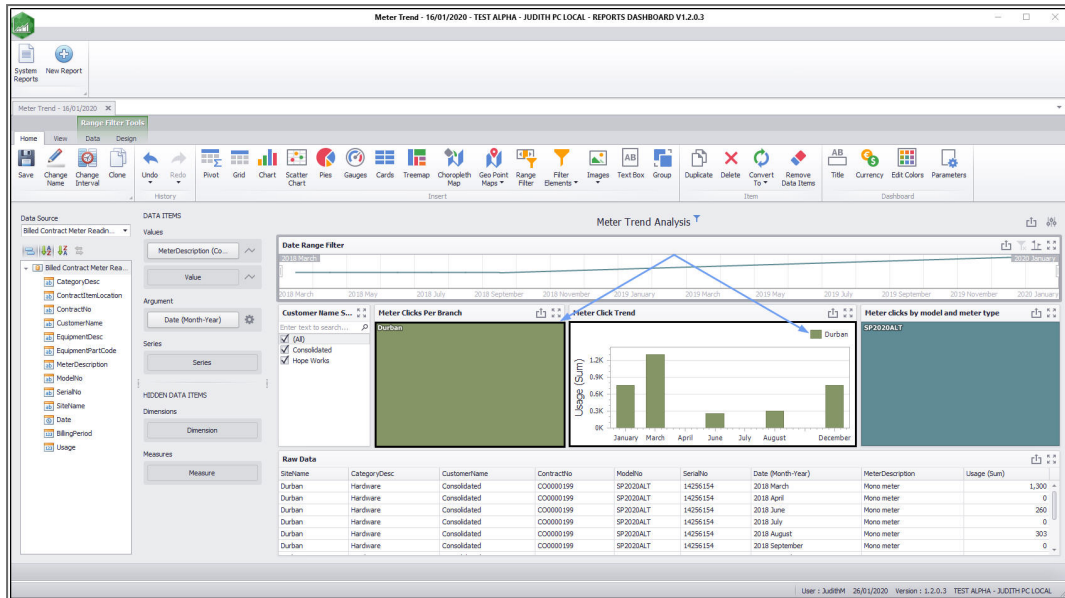


1. The **Global Colour Scheme** screen will be displayed.
2. Select an existing data item or
3. select a new data item.
4. For an existing data item, select an existing value or create a new value.  
For a new data item, create a new value.
5. Click on the current colour scheme of the selected value and
6. select a new colour from the range of colours displayed in the **Colour Palette**.
7. Click on **OK**.



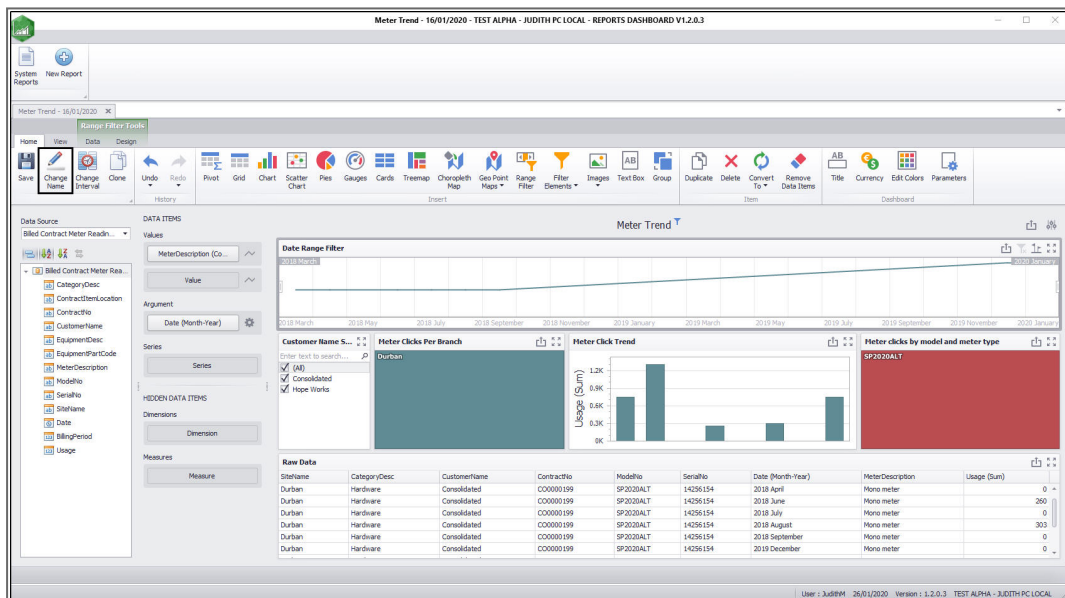
- The colour of the selected value will change.



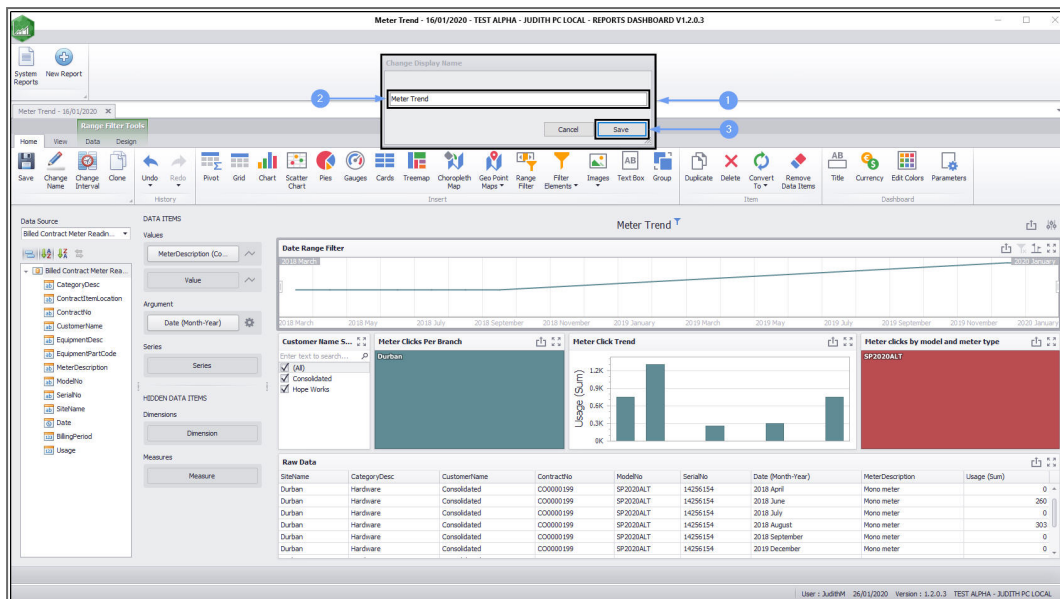


## CHANGE REPORT NAME

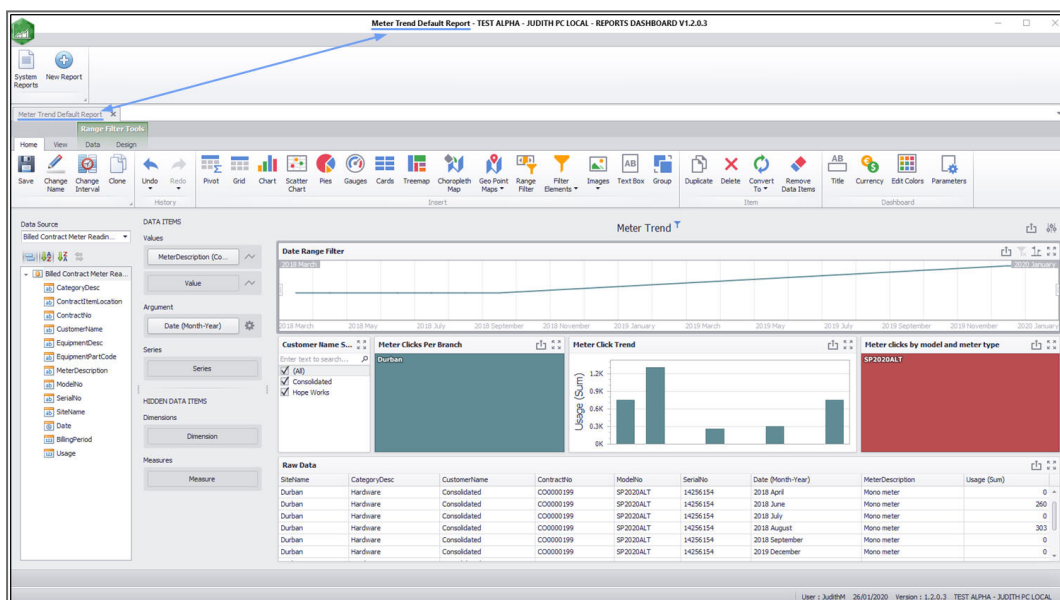
- Click on **Change Name.**



- The **Change Display Name** screen will be displayed.
- Delete and type in the new report name.
- Click on **Save.**

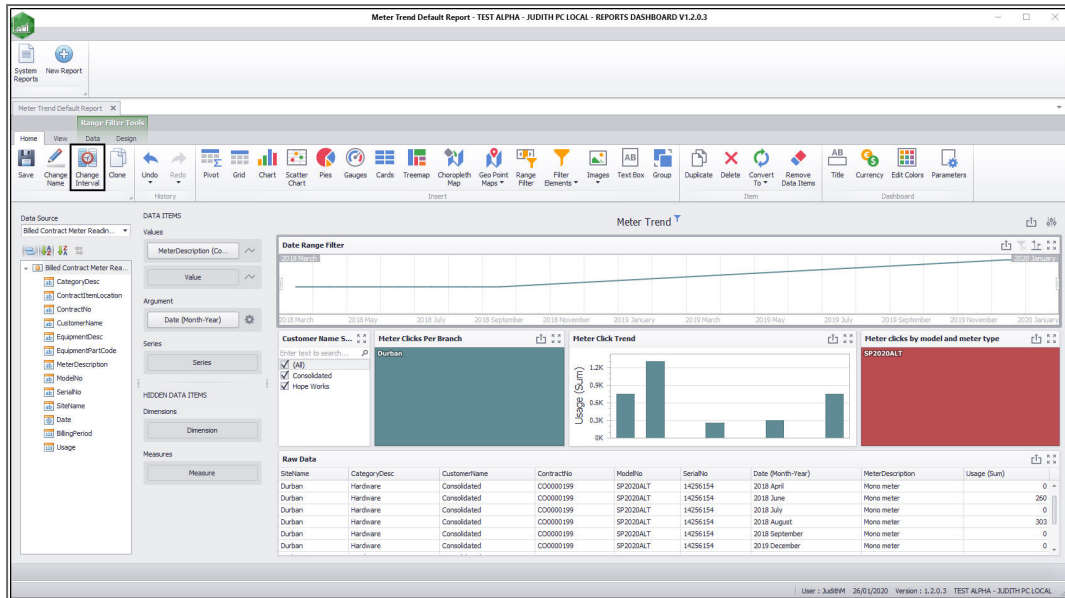


- The new report name will now be displayed.

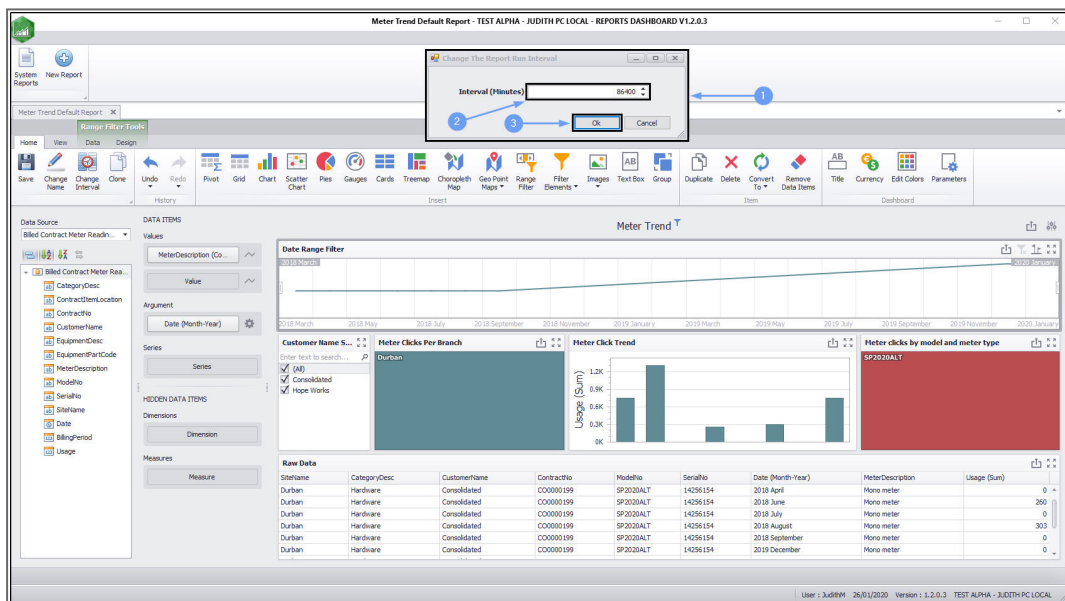


## CHANGE REPORT INTERVAL

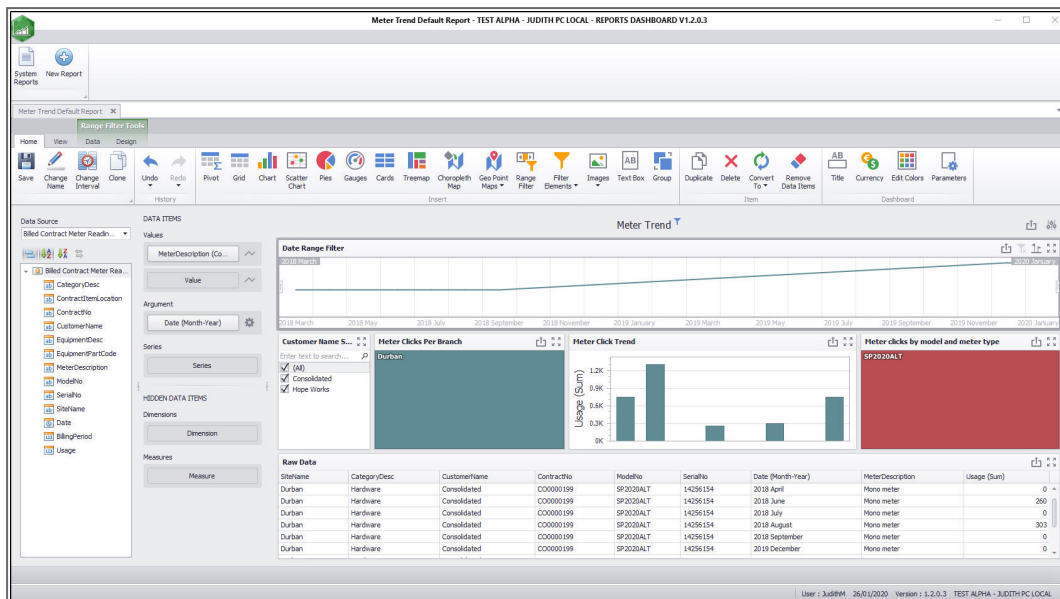
- Click on **Change Interval**.



1. The **Change the Report Run Interval** screen will be displayed.
2. Edit the interval.
3. Click on **OK**.

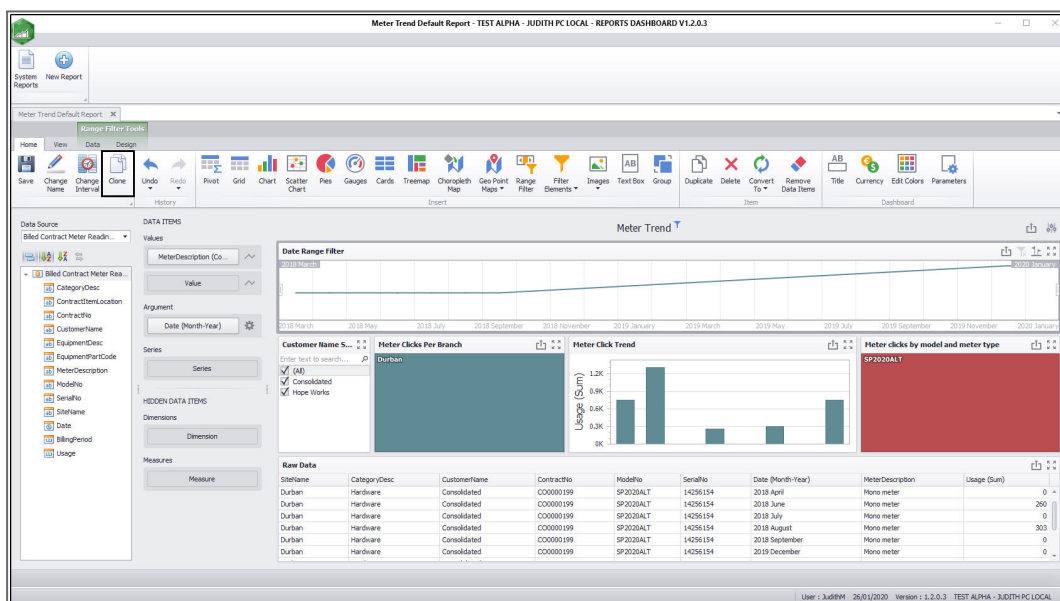


- The **Change the Report Run Interval** screen will be closed.



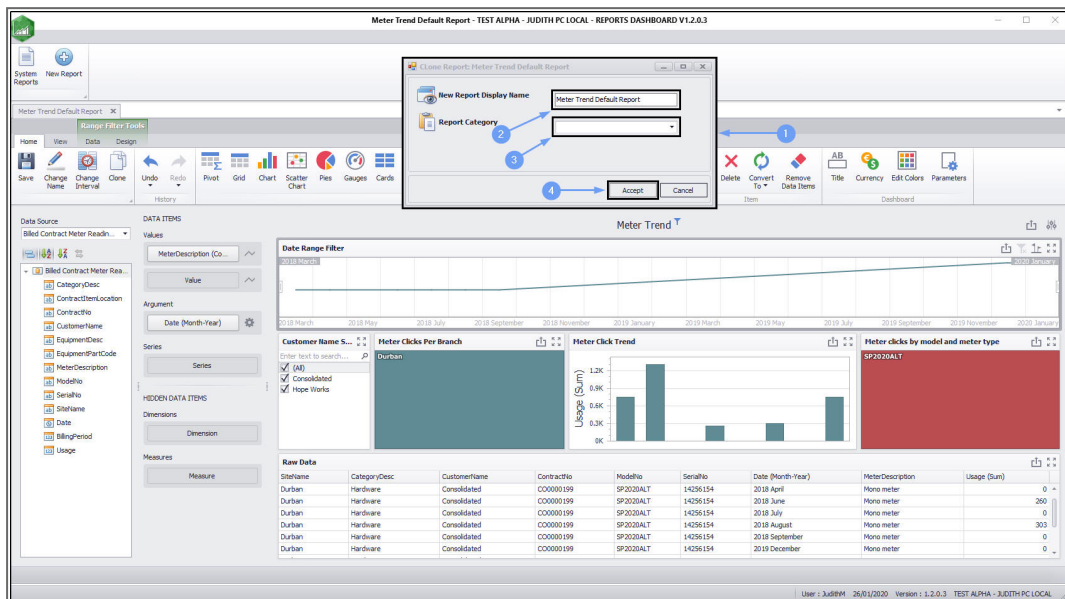
## CLONE REPORT

- Click on **Clone**.

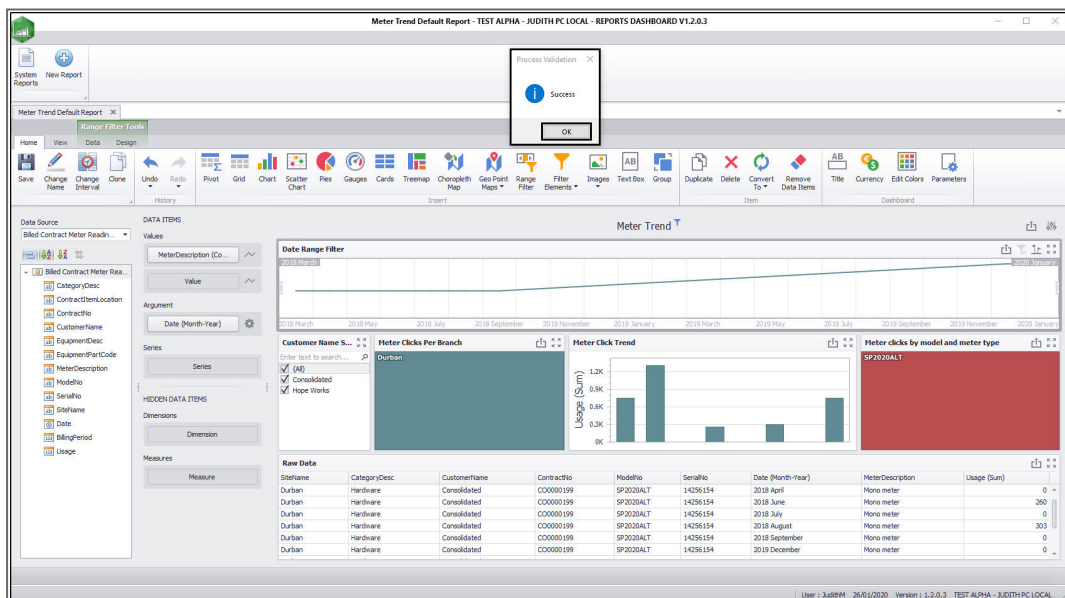


- The **Clone Report screen: [ ]** will be displayed.
- New Report Display Name:** The original report name will be displayed by default. Delete and type in a new report name.

3. **Report Category:** Click on the down arrow and select the required category.
4. Click on **Accept**.

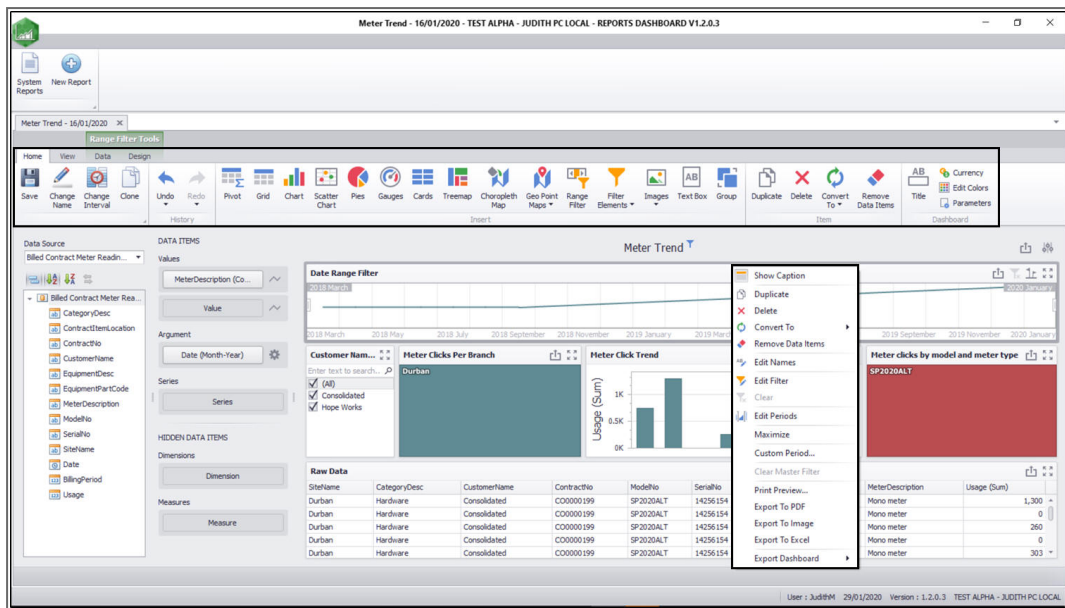


- A **Process Validation** screen will pop up telling you;
  - **Success.**
- Click on **OK**.

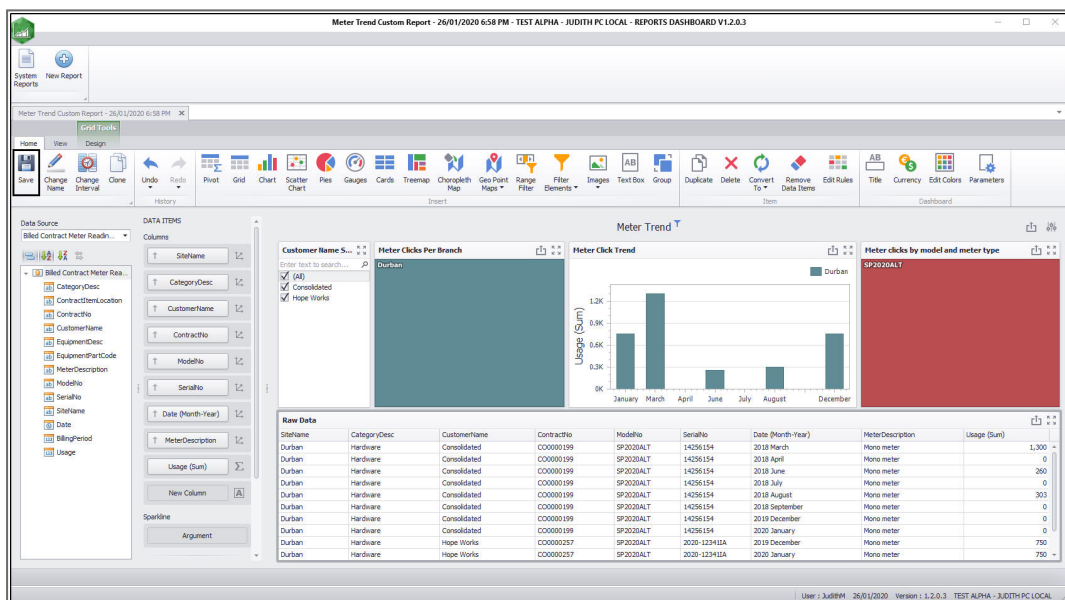


- The new report will be displayed.
- You can make any of the following changes if required:
  - Add a new dashboard item
  - Show or hide dashboard item title
  - Duplicate a dashboard item
  - Delete a dashboard item
  - Convert a control type
  - Remove data items from a dashboard item
  - Rename 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
  - Set up report filters
  - Change report design

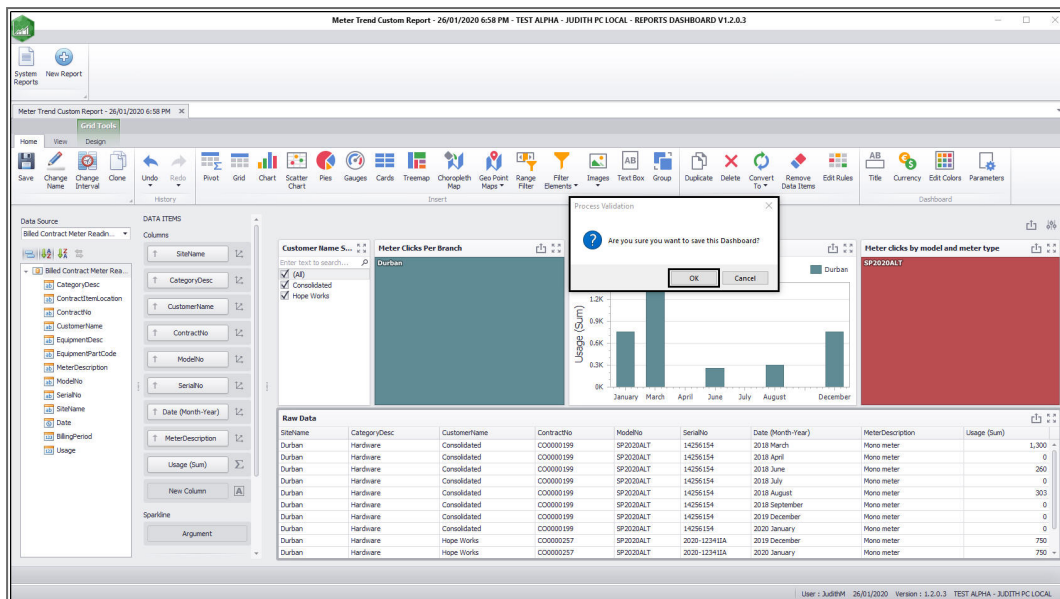




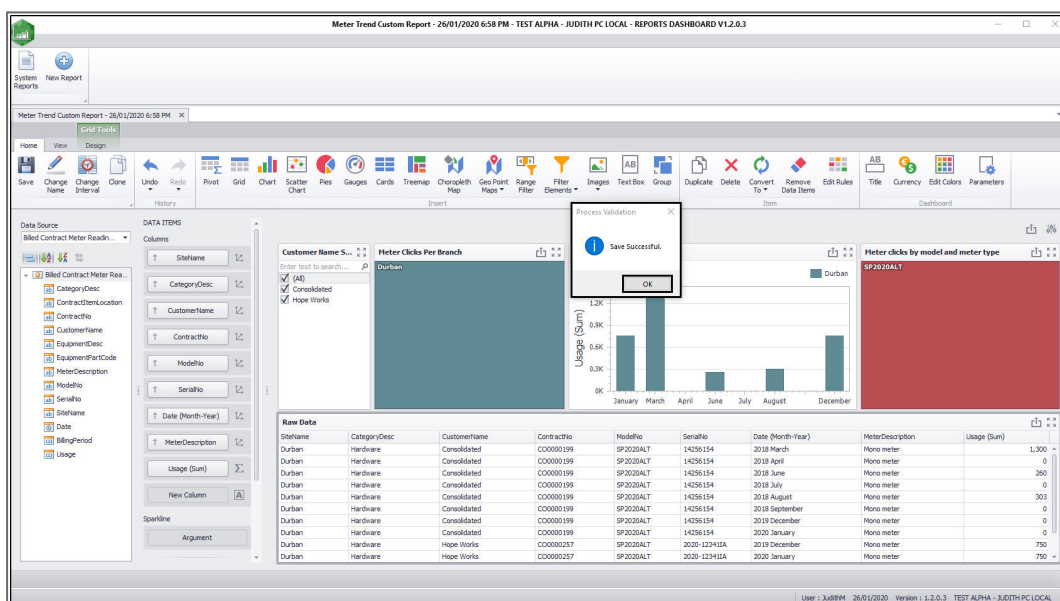
- When you are done, click on **Save**.



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

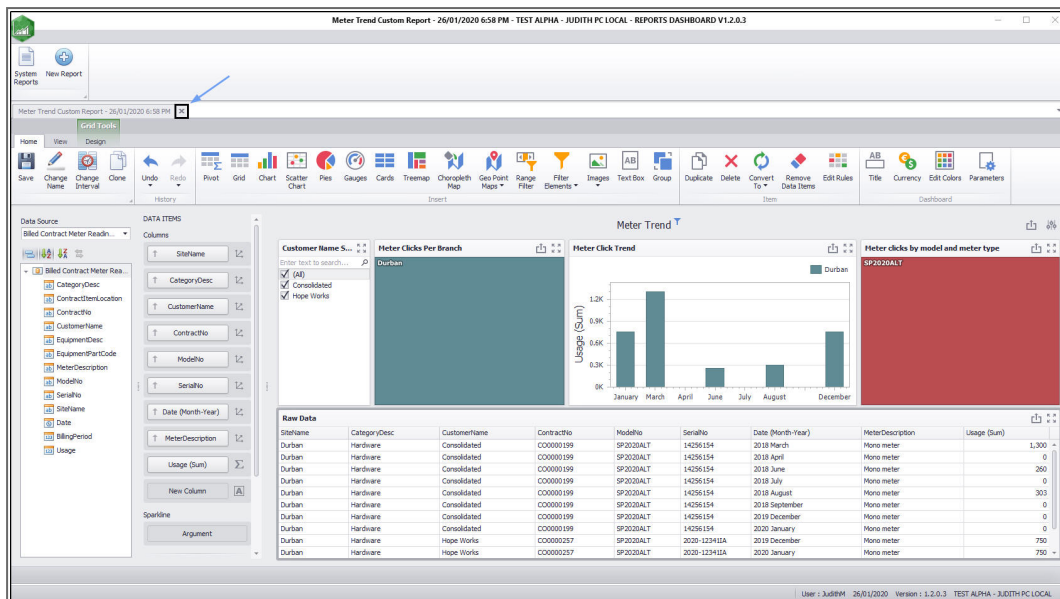


- A **Process Validation** message will pop up telling you;
  - **Save Successful.**
- Click on **OK**.

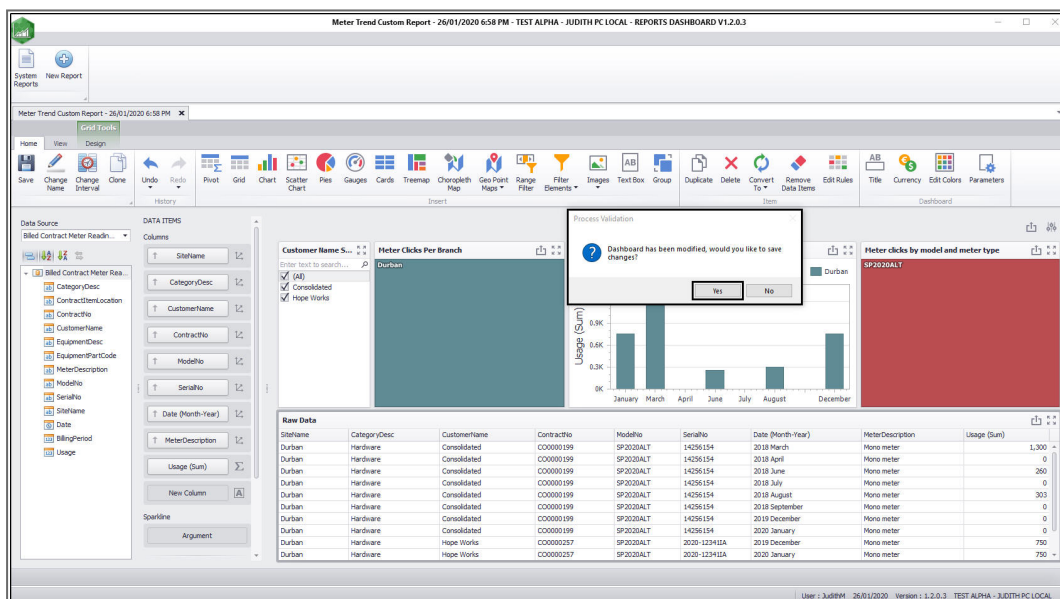


- The **Process Validation** screen will close.
- Click on **Close**.



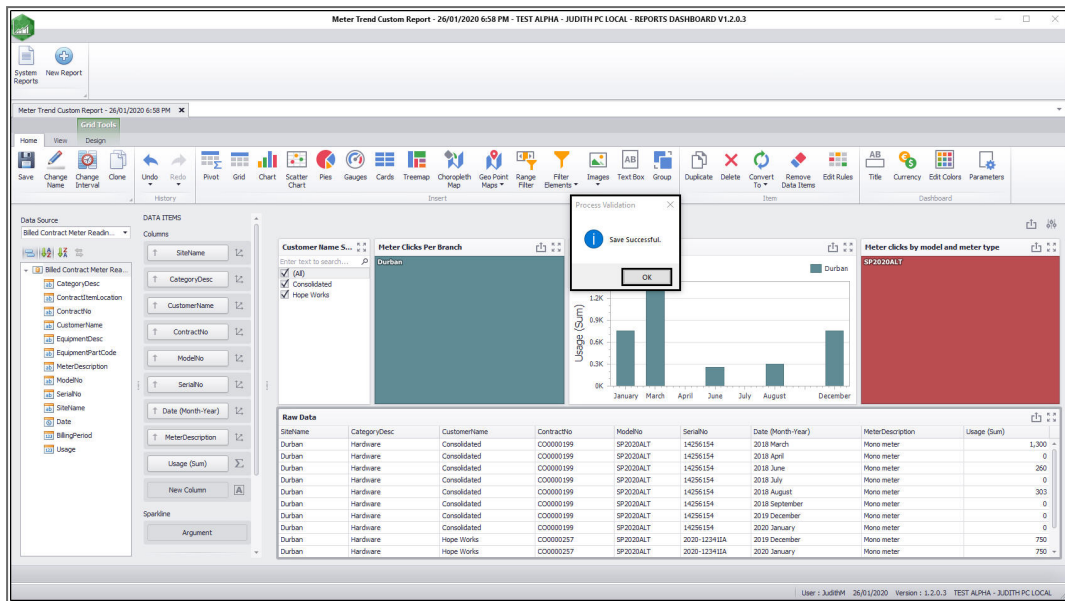


- A **Process Validation** message asking you;
  - **Dashboards has been modified, would you like to save changes?**
- Click on **Yes**.

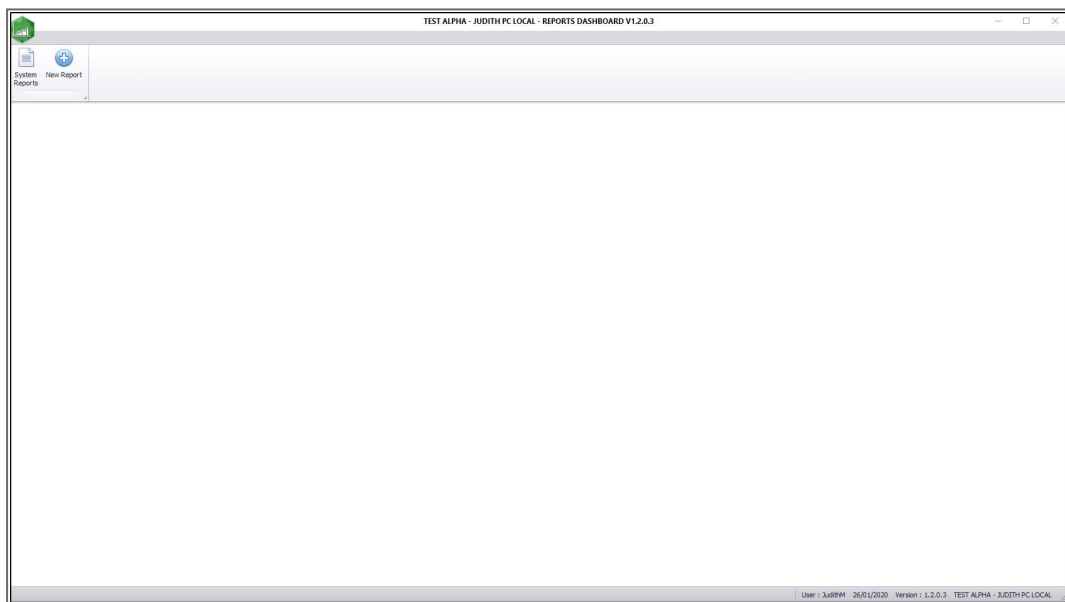


- A **Process Validation** message will pop up telling you;
  - **Save Successful.**

- Click on **Ok**.



- The report screen will be closed.
- You can now **view** the report if you wish.



## Related Topics

- Add a new dashboard item
- 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.....
- Configuration of report filters
- Change report design

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