REPORTS DASHBOARD

INTRODUCTION TO REPORTS DASHBOARD

BPO Reports Dashboard is a standalone application that graphically displays critical business information onto a dashboard which can be viewed graphically in real time.

"Dashboards are easy to read, real time user interface, which shows a graphical presentation of the current status and historical trends of key performance indicators to enable informed decisions. Dashboards can be broken down according to role and are either strategic, analytical, operational, or informational"

"Dashboard software is any computerized tool designed to simplify complex data sets, reveal patterns, and provide users with a way to monitor business performance at a glance. Modern dashboards use data visualization to improve the user experience of traditional business intelligence."

BPO Reports Dashboard should be used in conjunction with Windows BPO_DashboardRefreshService. This service will periodically refresh the dashboard with the most current data related to the Dashboard's reports.

Users can use pre-defined system reports and or add new reports that are tailor made to meet their report requirements. Users can also clone reports to create different views.

Security rights must be configured per group that requires access.

***Access:*** *Reports Dashboard Icon* > *Log In*

The ***Reports Dashboard*** application will open.
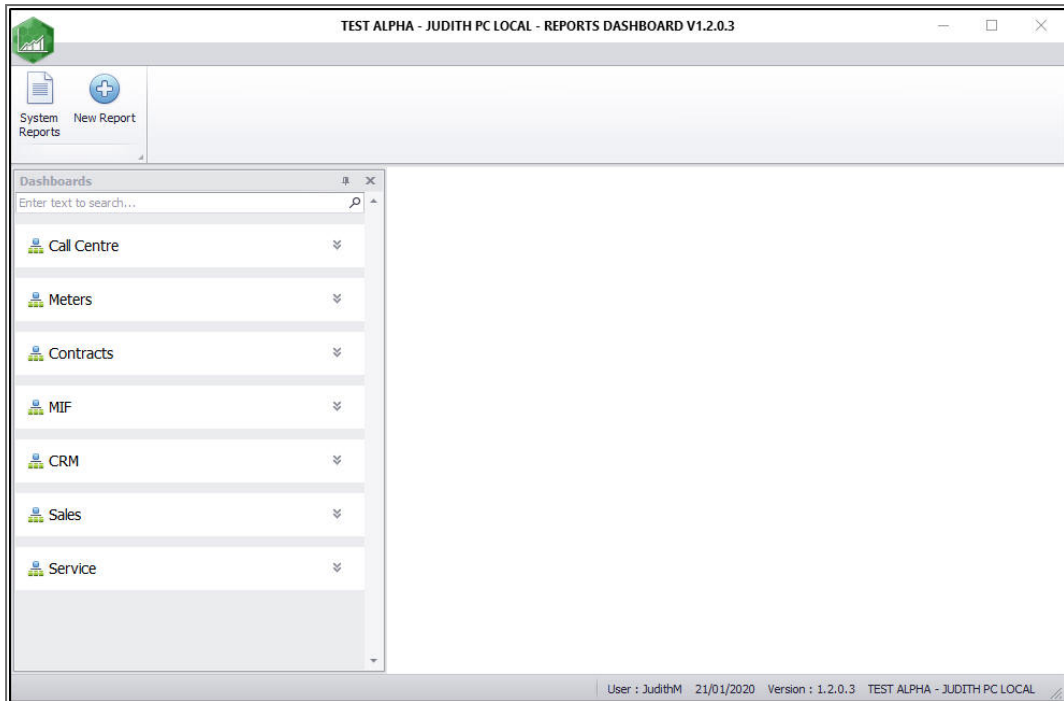
TOOLBAR OPTIONS

The *Reports Dashboard* toolbar gives you the following options:

1. **System Reports:**
   - This will display a list of all pre-defined (default) reports in the *Dashboards Panel*. Clicking on this button will either:
     - close or
     - restore the Dashboards Panel.)

2. **New Report:**
   - This button enables you to create new reports.

3. **Dashboards:**
   - Initially, this panel will display pre-defined (default) system reports. As new reports are added, it will also display the new dashboard reports.
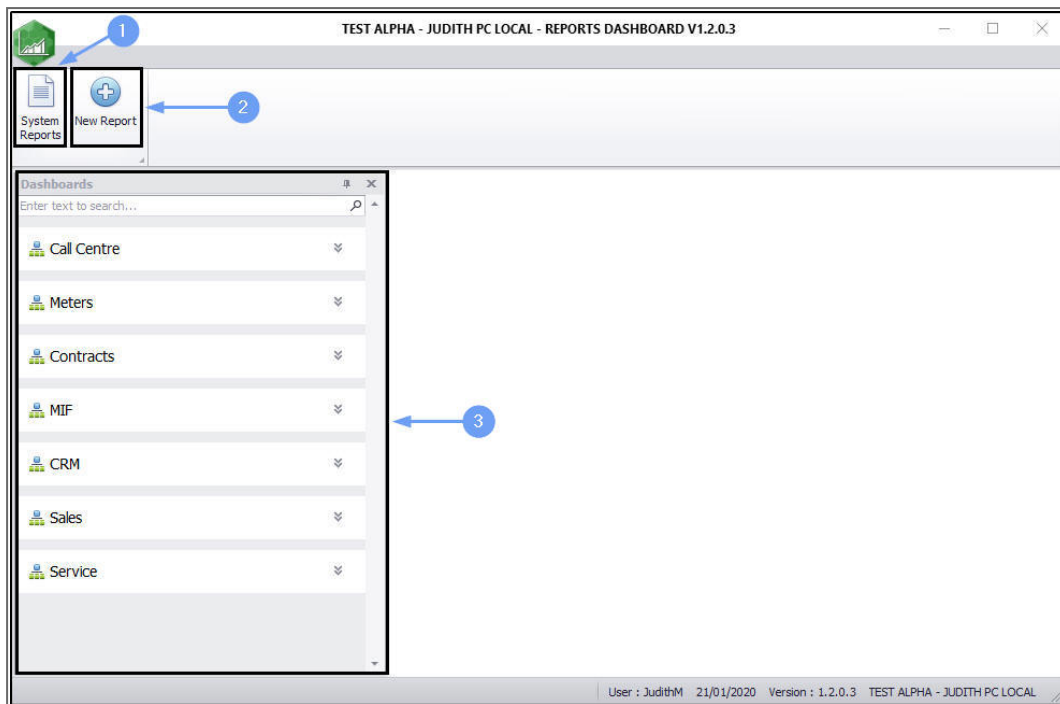
REPORT CATEGORIES

- The *Dashboards* panel displays all the Report Category <u>titles</u> e.g. Call Centre, Meters, Contracts. Clicking on a title will expose the underlying 'active' reports.
- If there are no linked 'active' reports for a Category, that Report Category will not be displayed in the Dashboards panel.
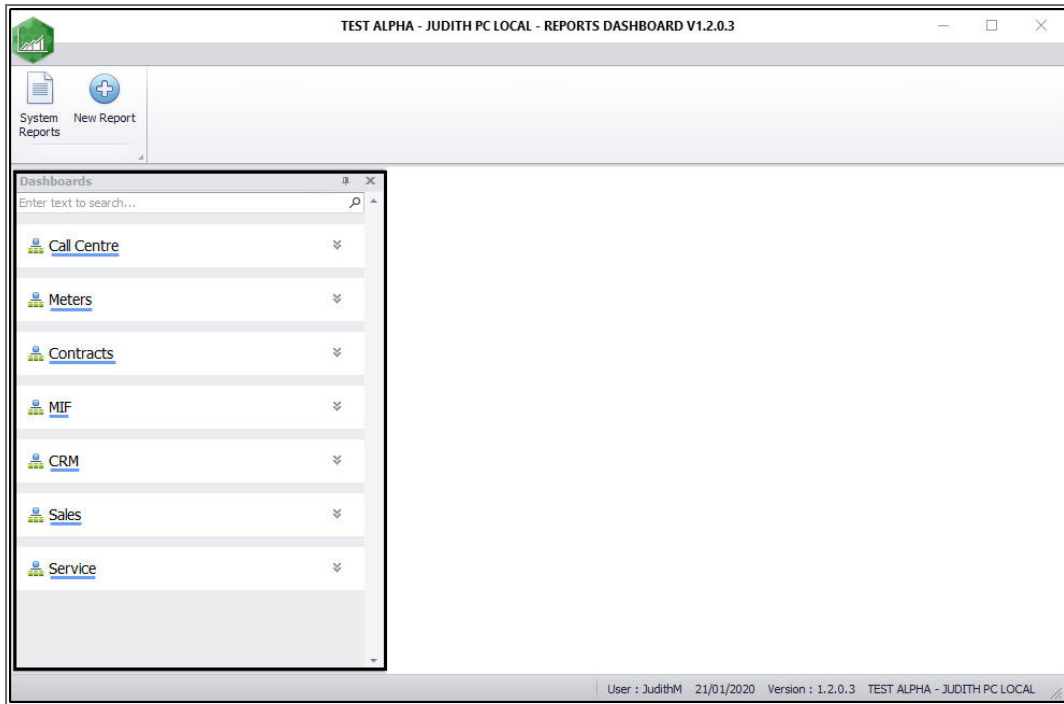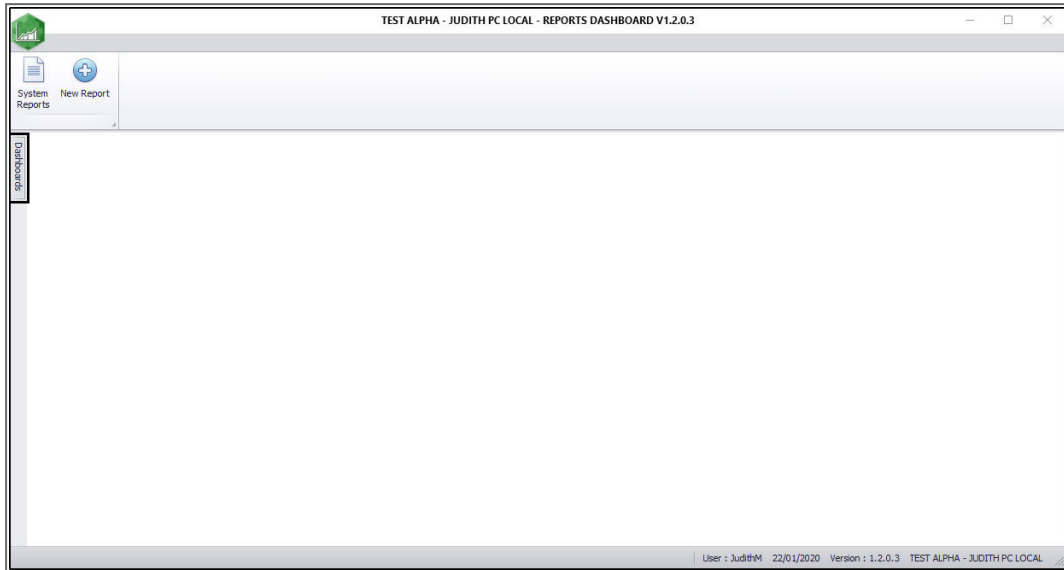
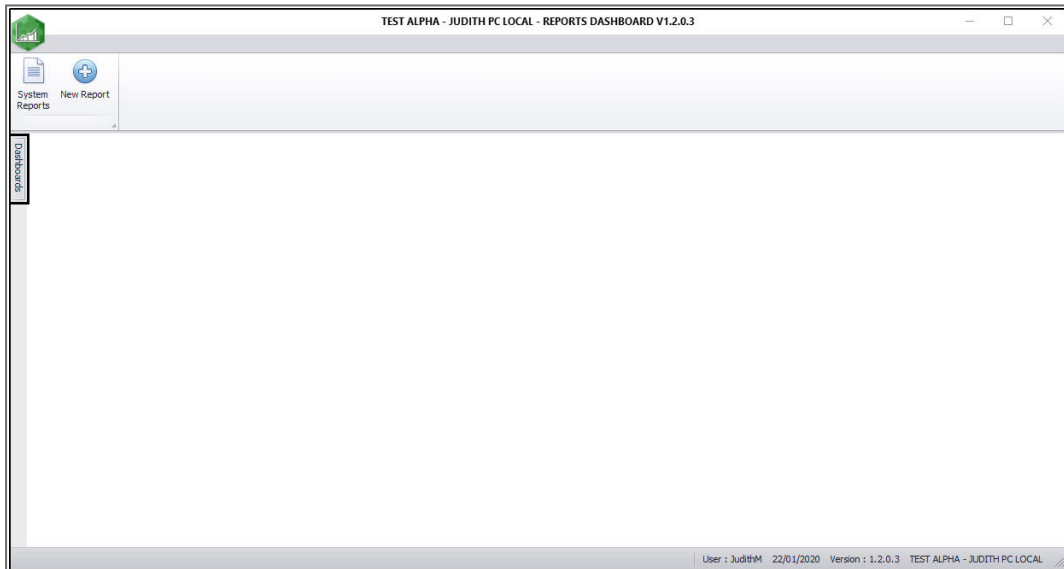# DOCK/UNDOCK THE DASHBOARD PANEL

- By default, the Dashboards panel will be docked on the screen (the pin icon will be standing up).
- To undock/hide the Dashboards panel, click on the docking icon.
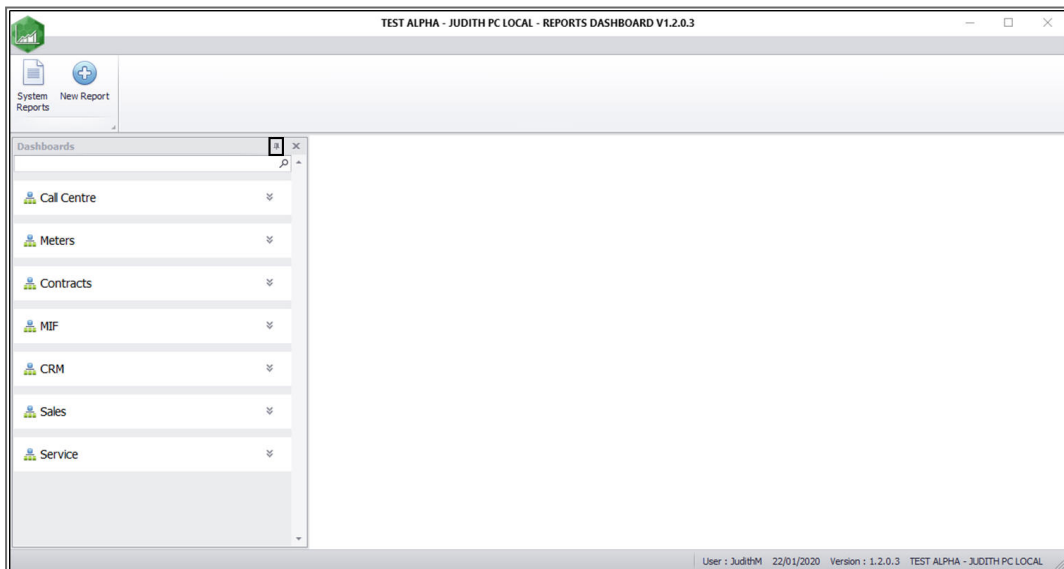
- The Dashboards panel will be hidden.
- The left side of the screen will now contain a *Dashboards* tab to show you that there is a hidden panel there.
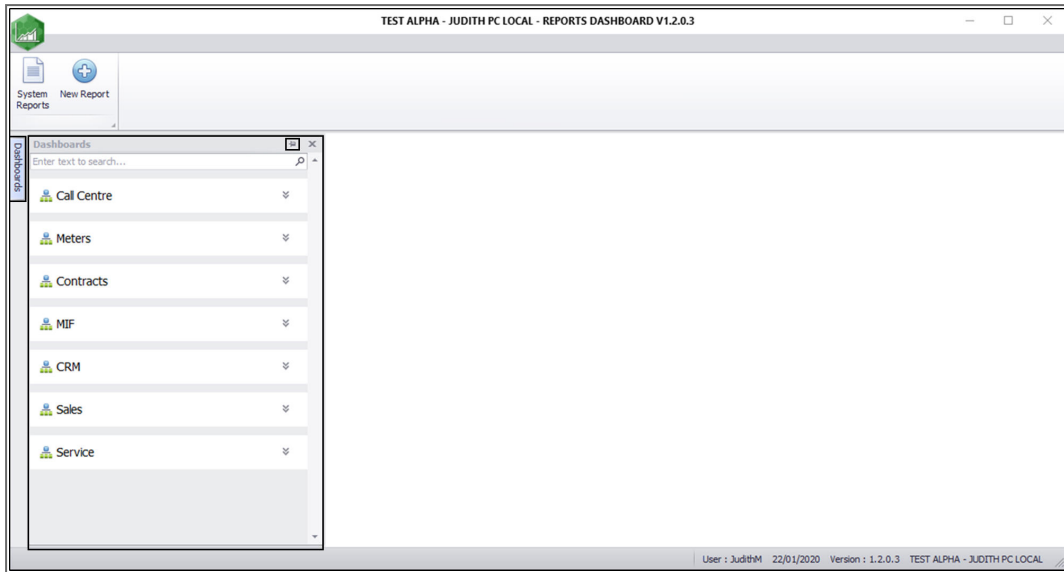

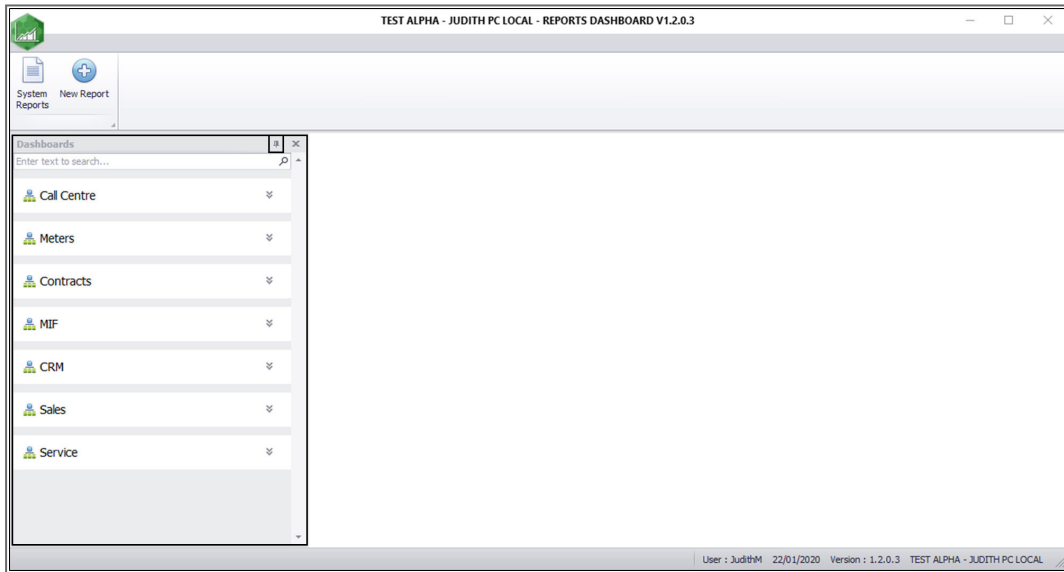- To re-open the Dashboards panel, click on the *Dashboards* tab.

- The Dashboards panel will be expanded, the pin icon will be on it's side and the tab will still be displayed on the screen.

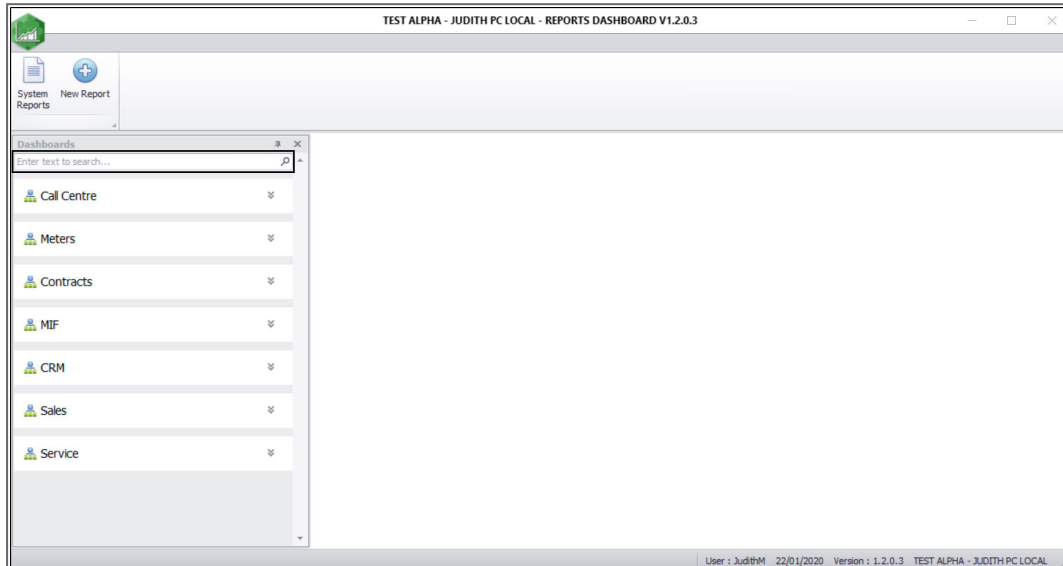- Dock the panel by clicking on the pin.

- The Dashboard panel will now be docked (the pin icon will again be upright) and the Dashboard tab will no longer be displayed on the screen.
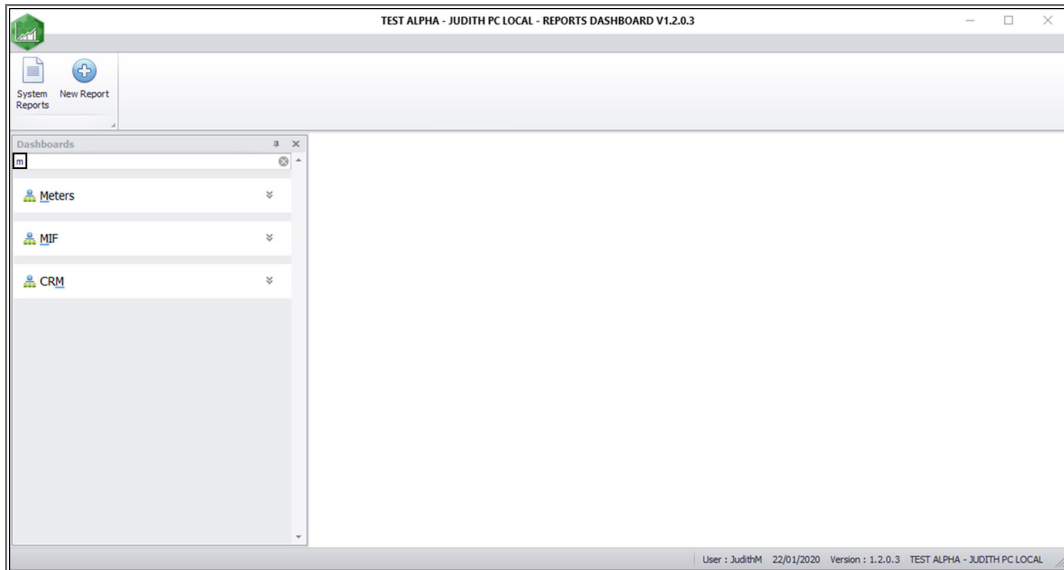
SEARCH FOR A REPORT CATEGORY

- Click in the *Search* field and start typing in what you are looking for.
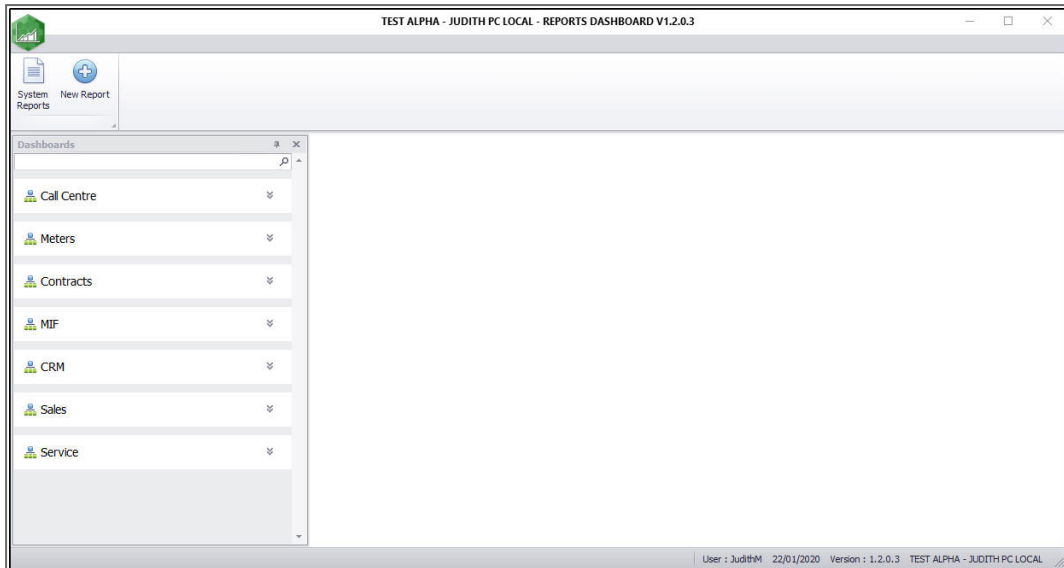

1. As you start typing, the system will begin to *search* and *filter* according to the input text. In this example a search has been done for all the Report Categories that have **'M'** in their name.
2. The system has pulled up all the Report Categories that contain the word **'M'**.

- To *remove* the filter in the Search field, click on the *Clear* button.
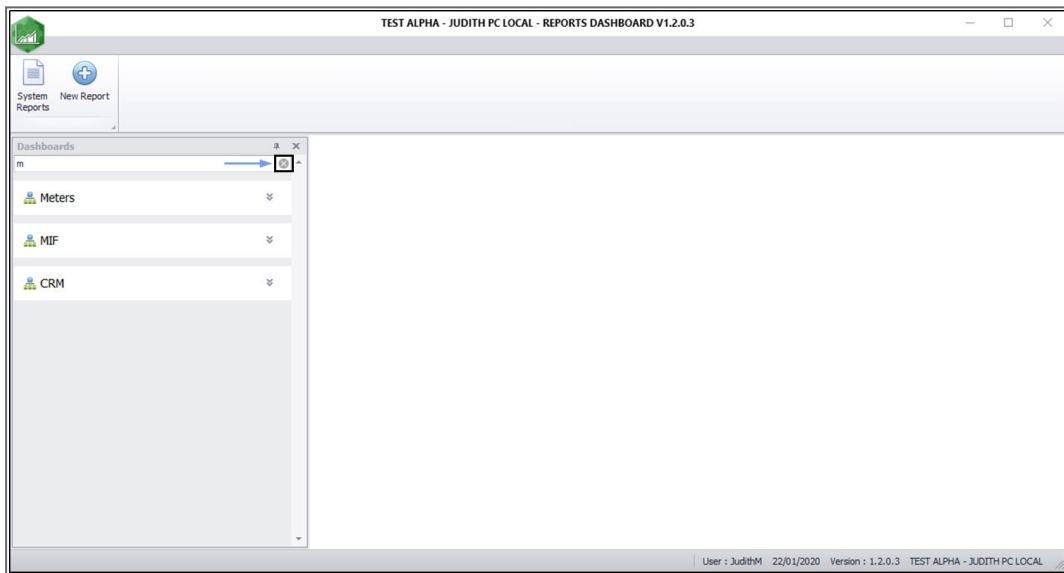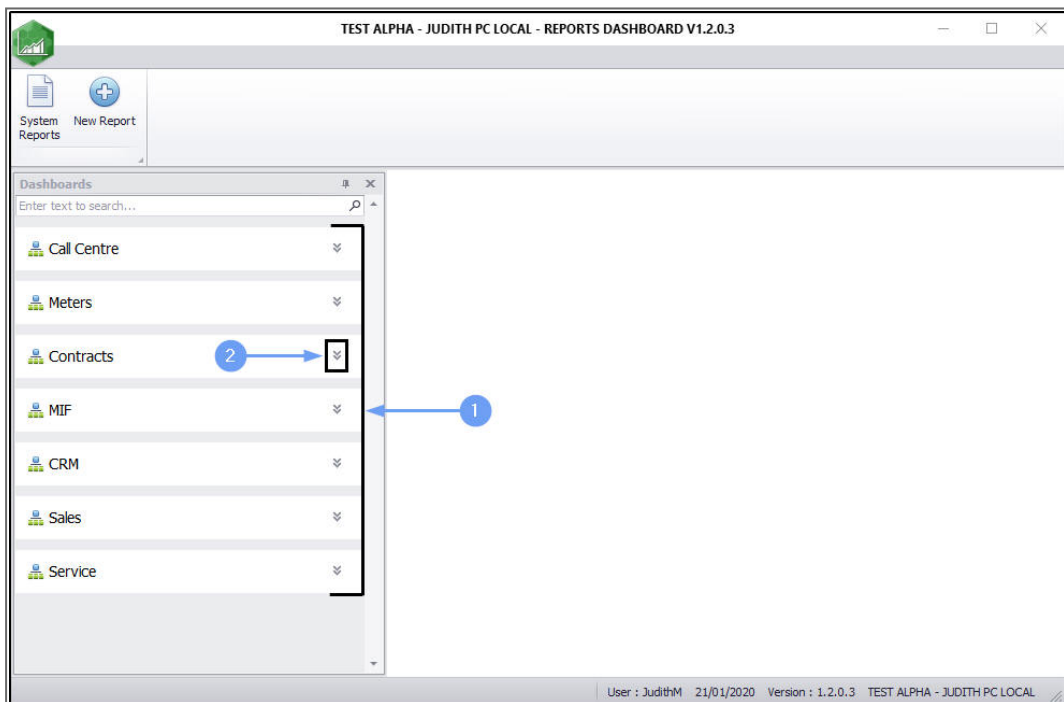

- The text will be removed.

EXPAND A REPORT CATEGORY

1. Expand a selected Report Category by clicking on the down pointing *chevron view node*.

2. In this image, *Contracts* has been selected.

1. A list of all the 'active' reports linked to the selected category will be displayed and the chevron view node will now be pointing up.
2. Each report will auto display the following *Action* buttons:
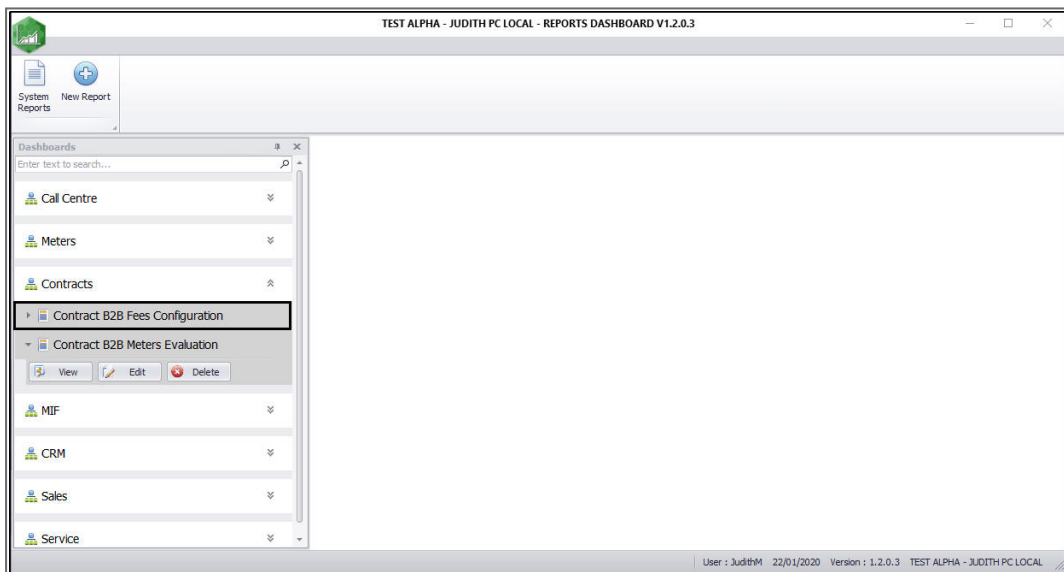   - **View**
   - **Edit**
   - **Delete**
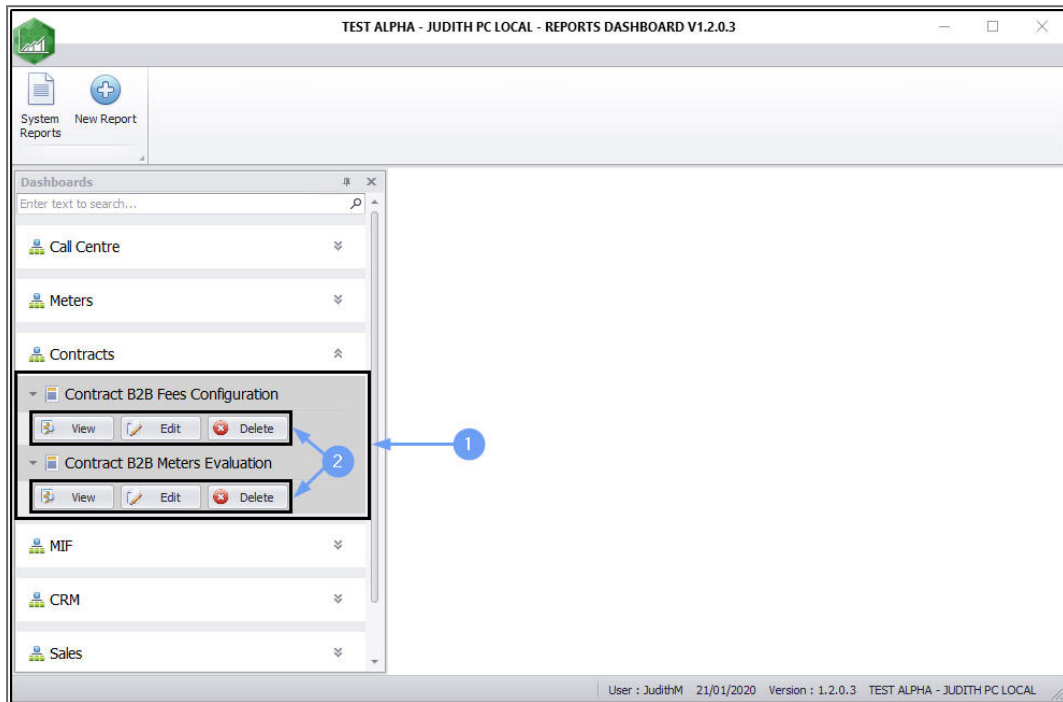
HIDE/UNHIDE THE REPORT ACTION BUTTONS

- Click on the *down pointing arrow* in front of a selected report.
  - In this example, the *Contract B2B Fees Configuration* report is selected.
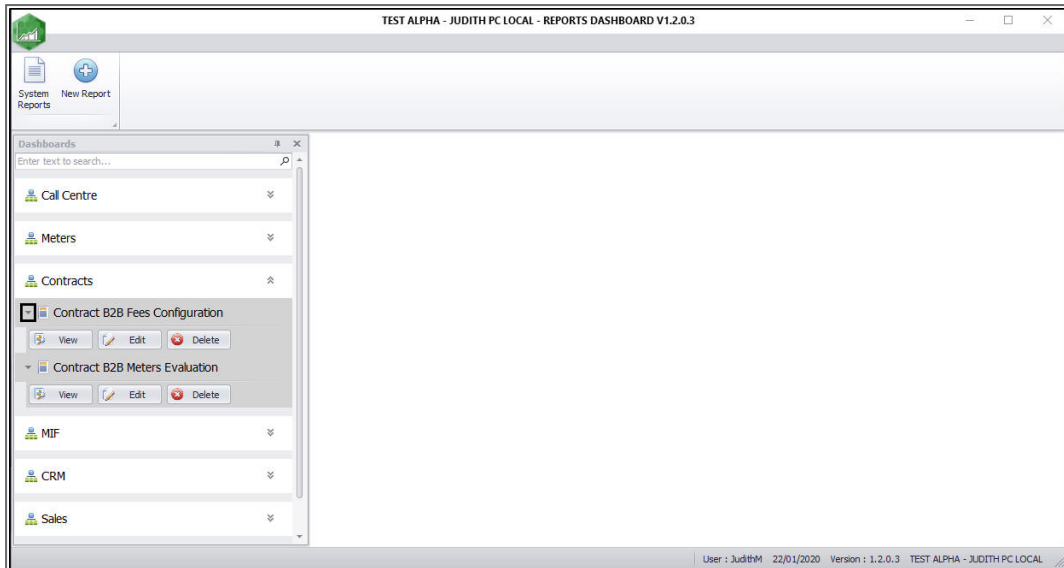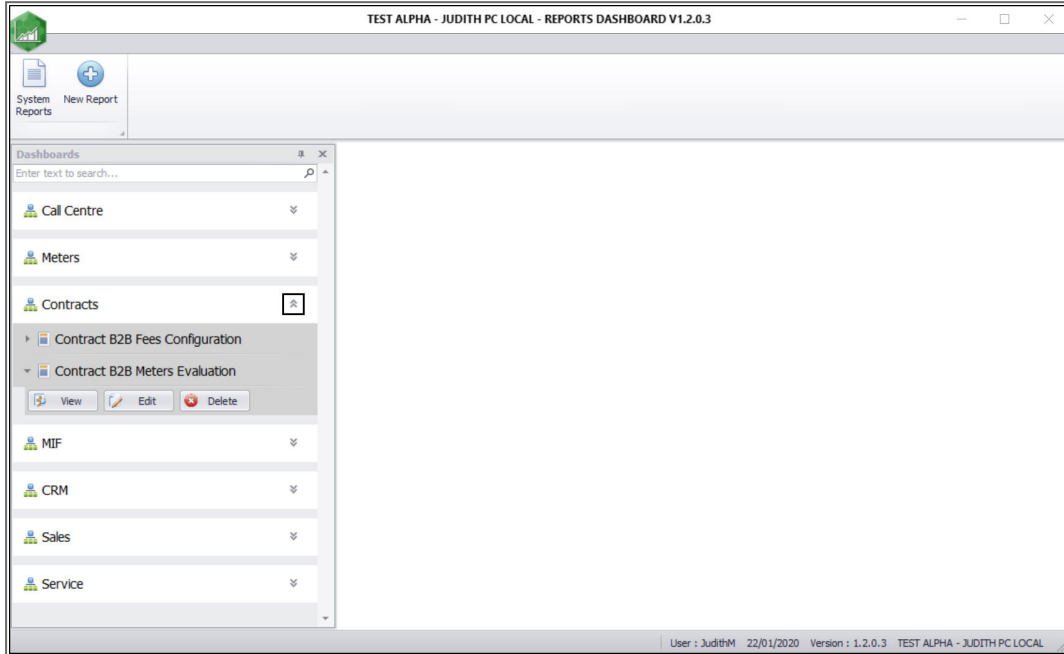
- The report Action Buttons will be hidden and the arrow will now be pointing right.
  - **Note**: To unhide the Action Buttons, click on this arrow again.
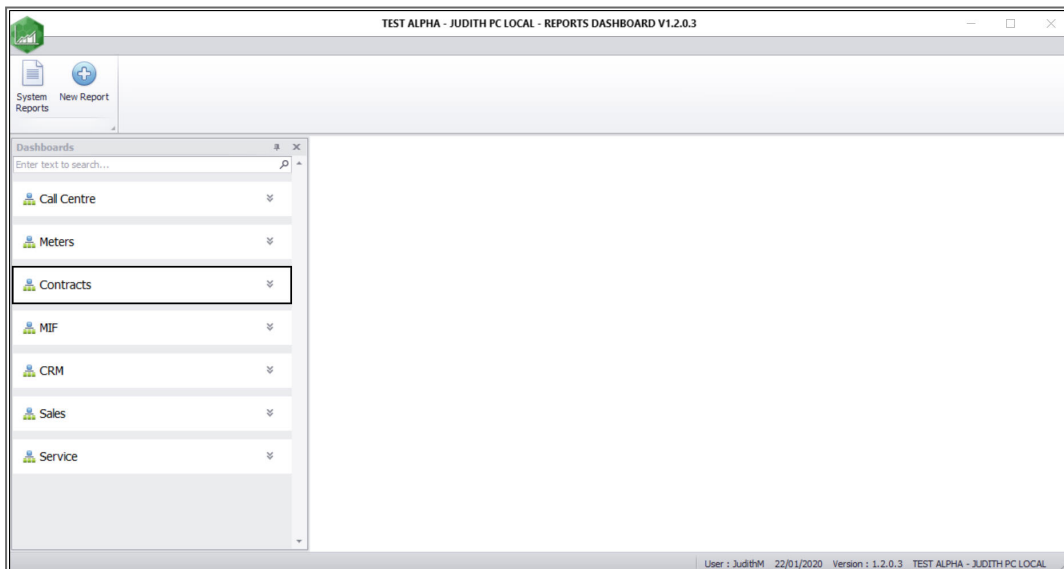
COLLAPSE A REPORT CATEGORY

- To collapse the Report Category, click on the upward pointing chevron view node.
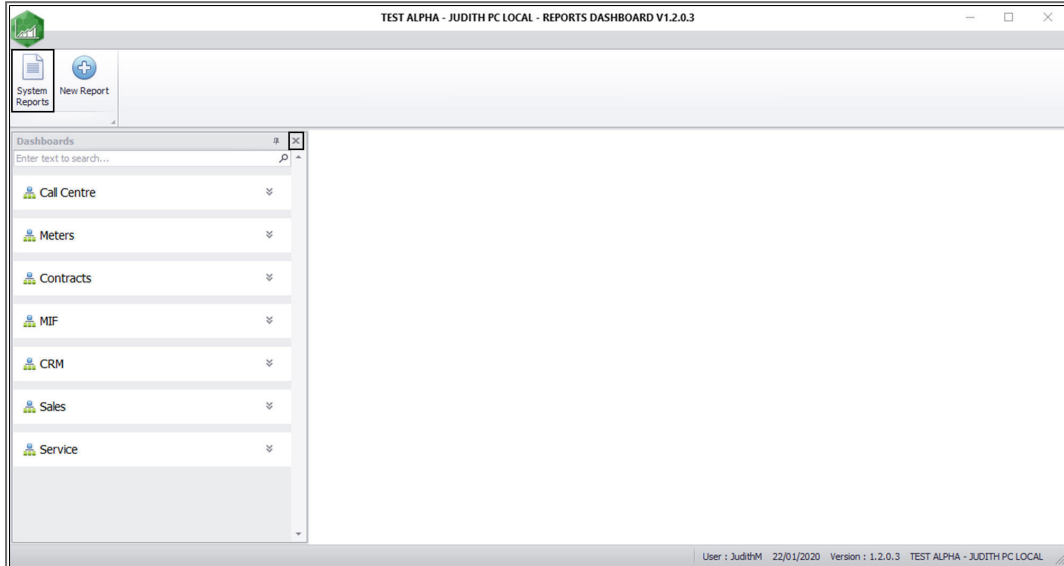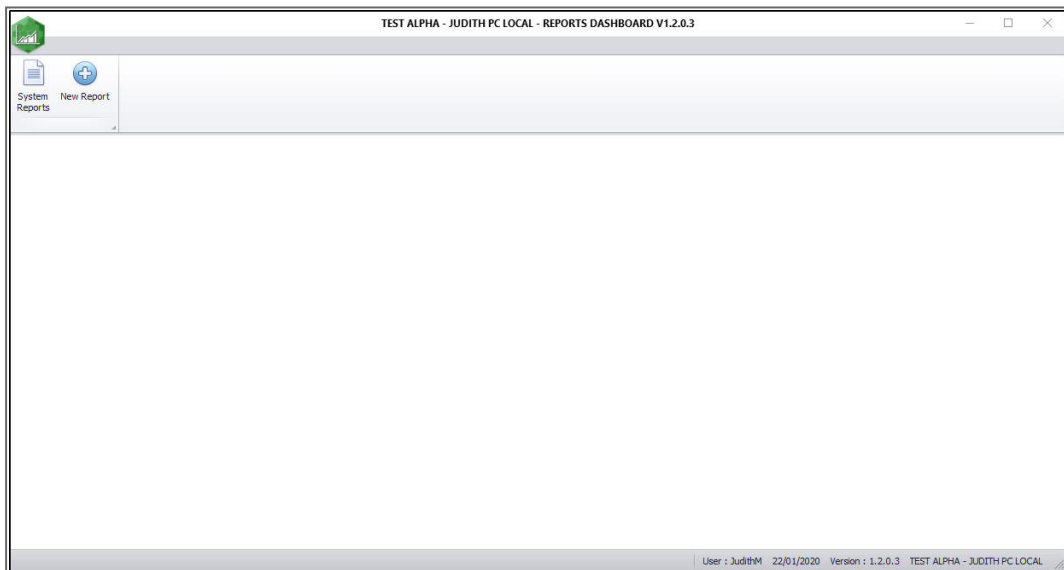

- The Report Category will be closed.

CLOSE THE DASHBOARD PANEL

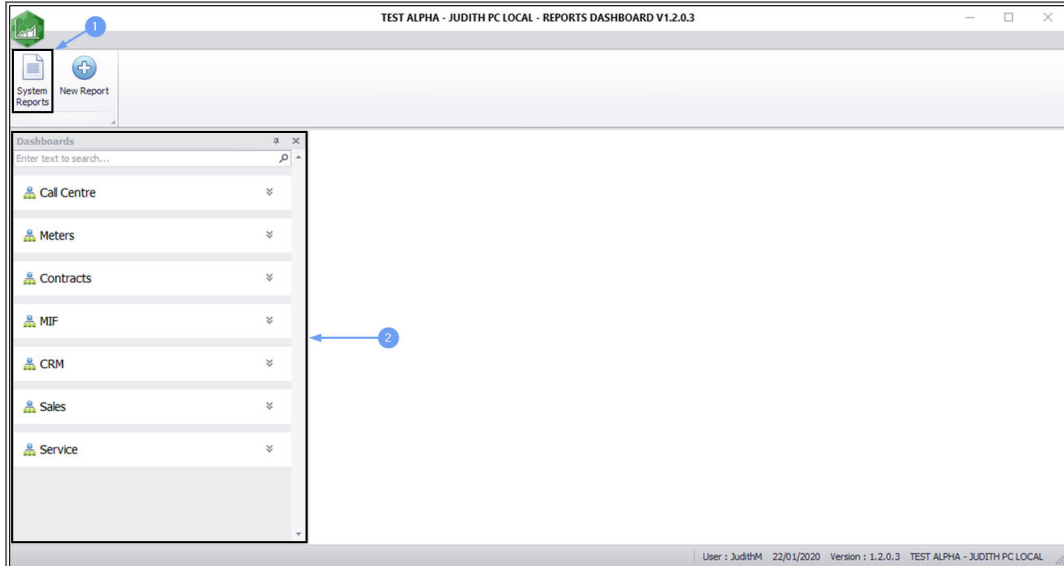- To close the Dashboards panel either click on the *System Reports* button or the *Exit* icon.

- The Dashboard Panel will be *closed*.

RESTORE THE DASHBOARD PANEL

1. To *restore* the Dashboard Panel, click on *System Reports*.
2. The Dashboard Panel will displayed.

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