

REPORTS DASHBOARD

ADDITIONAL DASHBOARD ITEM OPTIONS

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

In **Reports Dashboard**, when <u>adding</u> or <u>editing</u> dashboard items, there are multiple options you can use to customize your dashboard report.

Access: Reports Dashboard Icon > Log In

The *Reports Dashboard* application will open.

DASHBOARD MENU OPTIONS

- When adding or editing a dashboard, if you right click on a dashboard item *column header* or *title*, a *menu* with additional options will be displayed.
 - Note: Some of the options displayed in the right click menu are pertinent to the selected control type (dashboard item) and won't be available if a different control type (dashboard item) is selected.



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SHOW OR HIDE DASHBOARD ITEM TITLE

1. Click on *Show Captions* on either the *Design Tab* or the *right click menu*.

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- 1. The *Show Caption* button on the *Ribbon* will become disabled ('whitish' in colour).
- 2. The *title* of the selected control type (dashboard item) will no longer be displayed.
 - Note: To display the title of the selected control type (dashboard item) again, repeat the previous step. The now enabled Show Caption button on the Ribbon will be 'bluish' in colour.

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DUPLICATE A DASHBOARD ITEM

To duplicate a selected control type (dashboard item), click on
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• A duplicate of the selected control type (dashboard item) will be displayed.

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DELETE A DASHBOARD ITEM

To delete a selected control type (dashboard item), click on
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CONVERT A CONTROL TYPE

- 1. To change a selected control type (dashboard item), click on *Convert*
 - To on either the Home tab or the right click menu.
- 2. A side menu will pop up, select the control type you wish to convert to.
 - In this image, *Chart* has been selected.

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- The control type (dashboard item) will be converted to the selected control type.
 - In this image, a *Chart* is now displayed.



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REMOVE DATA ITEMS FROM A DASHBOARD ITEM

 To remove data items from a selected control type (dashboard item), click on *Remove Data Items* on either the *Home* tab or the *right click menu*.

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• The data items of the selected control type (dashboard item) will be removed.

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RENAME A DASHBOARD ITEM TITLE AND OR COLUMNS

• To edit the *title* and or *column names* of a selected control type (dashboard item), click on *Edit Names* on either the *Design* tab or *right click menu*.



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- The *Edit Names* screen will be displayed.
- Make the required changes.
- Click on Ok.

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- The changes will be saved.
 - In this image, the *title* of the selected control type (dashboard item *title*) has been changed from *Grid 1* to *Raw Data*.

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EDIT DASHBOARD ITEM FILTER

• To add / edit column filters of a selected control type (dashboard item), click on *Edit Filter* on the *right click menu*.



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- The *Filter Editor* screen will be displayed.
- Click on the *red 'And'* text in the *Filter Editor*.

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• This will bring up a *drop-down menu* with options to change the current filter selections.



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- Click on any one to make changes to the filter selection.
- In this image, *Not And* has been selected.

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• Not Add instead of 'And' is now displayed in the Filter Editor.



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	Argument		OK Cancel Apply	
			User : JudithM 23/01/2020 Version : 1.2.0.3 TEST	

• In the *Filter Editor*, click on the *Action* button.

em New Report													
Rec Outstanding To Trans X													
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me View Design													
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- A list of actions will be displayed.
- Select the required action.



			AP: Rec Outstandin	g To Trans - TEST ALPHA - JU	JUTTH PC LOCAL - REPOR	IS DASHBOARD V1.2.0.3			>
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1.2 Transactions			SPR001					×156K	×15
	Transactions (Sum)	Σ	SPR002					×121K	×12
			SUP001	_				×0	
	New Column	A	TON	_				×16K	*1
	Sparkline							*	
	Argument					ок с	ancel Apply		

- The selected action will be displayed.
- Click on the *blue text* in brackets (these are the column titles).

3		A	2: Rec Outstanding To	Trans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3		
stem New Report						
ports						
P: Rec Outstanding To Trans X						
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		1	Raw Data			ம் :
	† Account	12	Account		Transactions	
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ab Account	† Name	14	BUY001		×O	
ab Name		Σ	GAM001		×O	
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	Transactions (Sum)	Σ	SPR001 SPR002	Not StartsWith (Account), ?)	×156K ×121K	*15
	Transacuons (sum)	1	SUP001		×0	-12
	New Column	A	TON		×16K	×I
	Ivew Column	14				
	Sparkline					
				OK Cancel Apply		
	Argument					
				User : JudithM 23/01/2020 V		

- A list of titles will be displayed.
- Click on any of these titles to *change* the column that is being



filtered.

• In this image, the *Name* column has been selected.

		AP: Rec Outstandin	To Trans - TEST ALP	HA - JUDITH PC LOCA	L - REPORTS DASHB	OARD V1.2.0.3			- 0 ×
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+ [] AP: Rec Outstanding To Tr		POY2001						*0	×0
ab Account	1 Name 1	24 BUY001	_					×O	×0
ab Name	Difference (Sum)	GAM001						×O	×0
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Transactions	Outstanding (Sum)		_					×0	×0
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						User : Judi	01M 23/01/202	u version : 1.2.0.3 TES	T ALPHA - JUDITH PC LOCAL

• In this image, the *Filter Editor* will now displays *Name* as its column filter instead of *Account*.

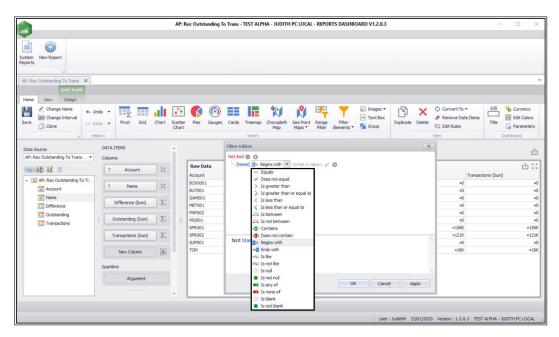
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Change Name 🔶 Undo 👻 🎫 🚺	🏹 🌔 🧭	📰 🔝 💓 🐧 📭 🍸 🖾 Images 🕶	rì ×	Convert To -	AB Gurrency
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AP: Rec Outstanding To Trans Columns]	Not And			c ¹ ם
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Transactions (Sum)	SPR001 SPR002			×156K ×121K	×156K ×121K
Tarsocons (oun)	SUP001	Not StartsWith [Name], ?]	<u>^</u>	×0	×0
New Column A	TON			×16K	×16K
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Argument		OK Cancel	Apply		
		User :	JudithM 23/01/2020	Version: 1.2.0.3 TEST	ALPHA - JUDITH PC LOCAL



• Click on any one of the *green text*. (These are all the *methods* of filtering available in this data grid.)

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	Argument					OK Cance	Apply		
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• A pop up menu will display a list of the filter *method options* for the selected column.





- Click on any one of these to select the *filter method* required.
- In this image the filter method *Begins with* has been selected.

	AP: Rec Outstanding Te	o Trans - TEST ALPHA - JUDITH PC LOCAL	- REPORTS DASHBOARD V1.2.0.3	- 🗆 X
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★ ③ AP: Rec Outstanding To Tr	BOX0001 BUY001			×0 ×0
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12 Outstanding 12 Transactions 1 Outstanding (Sum) Σ	PNP002 PRI001 SPR001	Is between Is not between Is not between Is contains		×0 ×0 ×0 ×0
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		 Is blank Is not blank 	Have - Judition - 2010 - 2010	Version : 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

• The *Filter Editor* will now display this filter method choice.

•				
larit	A	P: Rec Outstanding I	Trans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3	- 🗆 X
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	int 🖾	Raw Data	[Name] Begins with <enter a="" value=""> /* 🚳</enter>	亡 53
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Arg	ment		OK Cancel Apply	
	¥			ion: 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

• Your filter search parameters needs to be appropriate to the newly selected column and method.



• Click on the *enter a value* text.

	AP: Rec Outstanding Te	Trans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3	- 🗆 X
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Data Source DATA ITEMS AP: Rec Outstanding To Trans Columns	i	Filter Editor	<u>ٿ</u>
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ab Name □ Difference (Sum) ∑	GAM001 MET001 PNP002		0× 0× 0× 0×
12 Outstanding 12 Transactions Οutstanding (Sum) Σ	PRI001 SPR001		×0 ×0 ×156K ×156K
Transactions (Sum) \sum	SPR002 SUP001	Not StartsWith [[Name], ?]	×121K ×121K ×0 ×0
New Column	TON		×16K ×16K
Sparkine Argument		OK Cancel Apply	
		User : Jud#M 23/01/2020	Version : 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

- A *text box* will appear.
- Type in or click on the *down arrow* and select an appropriate parameter that applies to this particular column (*Name*) and filter method (*Begins With*).

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			Account	t	Transactions (Su	m)
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ab Account			BUY001		×0	
ab Name	Difference (Sum)	Σ	GAM00		*0	
1.2 Difference			PNP002		×0 ×0	
1.2 Outstanding	: Outstanding (Sum)	Σ	i PRI001		×0	
1.2 Transactions			SPR001		×156K	×15
	Transactions (Sum)	Σ	SPR002	-	×121K	×12
			SUP001		Not StartsWith (Name), 'Sprint Distributors International') *0	
	New Column	A	TON		×16K	*1
	Sparkline					
	Argument				OK Cancel Apply	
			-			



- The text box in the *Filter Editor* is not case sensitive, you can type in any part of a word or number.
- In this image, *Boxer* has been selected.

			AP: Rec O	utstanding	To Trans - TEST A	LPHA - JUDII	TH PC LOCA	- REPOR	RTS DASHB	DARD V1.2.0.3				-		×
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ab Account	† Name	12,	BUY		-								*0			
ab Name				1001									+0			=0
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	T	7	SPR		-								×156K ×121K			×156K ×121K
	Transactions (Sum)	Σ	SUP		Not Starts	Vith([Name	, 'Sprint Di	stributo	rs Internat	ional")			×121K			×0
	New Column	A	TOP										×16K			×16K
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	Argument								OF	Cance	a A	pply				
										~~~~						- 12
			_													
										User	: JudithM 2	3/01/2020	Version : 1.2.0.3 TEST	ALPHA - JL	DITH PC LC	CAL
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- 1. You can add more filters.
- 2. You can delete a filter.
- 3. When you have finished making your filter changes and selections, click on *Apply* and *Ok* to apply these to the dashboard item.



		3	AP: Rec (	)utstanding 1	To Trans - TES	T ALPHA - JUDIT	H PC LOCAL -	REPORTS DAS	HBOARD V1.2.0.3			- 0 X
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н	listory				Ir	nsert					Item	Dashboard
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	1 Account	12		w Data	[Name]	Begins with Boxer	/ 0 🗕	-2				也 23
+  AP: Rec Outstanding To Tr  Account	1 Name	14	BO	count X0001 Y001							×0 ×0	tions (Sum) xi
ab Name	Difference (Sum)	Σ	ME	M001 T001							0× ×0	×0
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	Transactions (Sum)	Σ	SPI	R002 P001	Not Star	rtsWith <mark>([Name</mark> ]	, 'Boxer')				×121K	×121K ×0
	New Column	A	то	N					3		×16K	×16K
	Sparkline										-	
	Argument								OK Cance	el Apply		
									User	: JudithM 23/01/2	020 Version : 1.2.0.3 TES	FALPHA - JUDITH PC LOCAL

- The selected filter will be applied to the dashboard item.
- In this image, *Boxer* is no longer displayed in the dashboard item.

4			AP: K	ec Outstand	ing to trans	IEST ALPH	A - JUDITH F	PCLOCAL	- KEPUK	IS DASHBO	OARD V1.2.0.3				- 0
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lome View Design															
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1.2 Transactions	Outstanding (Sum)	Σ		SPR001		t Distributors								×156K	×1
	Transactions (Sum)	-		SPR002 SUP001	10000	it Distributors Back Supplier	International							×121K ×0	×1
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	New Column	A	U		1.000							51			
	Sparkline														
	Argument														
			*												



### **CLEAR A DASHBOARD FILTER**

• To clear a column filter on a selected control type (dashboard item), click on *Clear* on the *right click menu*.

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Data Source AP: Rec Outstanding To Trans     DATA ITEMS     Datable       Image: Source S	Gurrency Edit Colors
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Raw Data     T Account     L       I Area Cultatandrog To Tr     T Account     Name       I Account     Name     Difference (Sum)       I Mame     Difference (Sum)     Duplicate       I Mame     Difference (Sum)     Duplicate       I Mame     Difference (Sum)     Duplicate       I Duplicate     Account     Name       I Mame     Difference (Sum)     Duplicate       I Duplicate     Account     Name       I Duplicate     Account     Name       I Duplicate     Account     Difference (Sum)       I Duplicate     Account     Difference (Sum) <t< td=""><td>c1 di</td></t<>	c1 di
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- The column filter will be cleared.
- In this image, *Boxer* is now displayed in the selected dashboard item.



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### **PRINT PREVIEW A DASHBOARD ITEM**

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• Click on *Print Preview*.



- The *Preview* screen will be displayed.
- You can now view the data contained in the dashboard item before printing.

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### EXPORT TO ....

- You can export data displayed in the dashboard item to *PDF* or *Image* or *Excel*.
- The *Export to Dashboard* option gives you the same *Export To...* options as above.
  - *Note:* For more information refer to Export To topic.



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#### **Related Topics**

- Change dashboard report title
- Set default currency
- Edit dashboard colours
- Change report name
- Change report interval
- Clone Report

### MNU.162.011