

We are currently updating our site; thank you for your patience.

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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DELETE A DASHBOARD ITEM

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• The selected control type (dashboard item) will be deleted.

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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.

		AP: Rec Outstanding T	o Trans - TEST ALPHA - JUDITH PC LOCAL - I	EPORTS DASHBOAR	D V1.2.0.3	-	
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0utstanding	Outstanding (Sum)	PNP002 PRI001 SPR001	Pick and Pay (Pty) Ltd Printer World (Pty) Ltd Sprint Distributors Local		 Remove Data Items Edit Rules 	Chart Chart Scatter Chart	×159
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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.



	AP: I	Outstanding To Trans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3	- D X
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		User : Ju	udithM 23/01/2020 Version : 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

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**.

		AP:	Rec Outstanding	To Trans - TEST ALPHA - JUDITH PC LOCAL - R	EPORTS DASHBOARD V1.2.0.3	3	>
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ab Account ab Name			BUY001 GAM001	Buy Back Supplier Game		X Delete	
ab Account ab Name 1a Difference 13 Outstanding	Difference (Sum)	Σ	BUY001 GAM001 MET001 PNP002 PR1001	Buy Back Supplier Game Metro Peach Distributors Pick and Pay (Pty) Ltd Printer World (Pty) Ltd		X Delete Convert To Remove Data Items Convert To Remove Data Items Convert To Convert T	×15 ×12
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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**.



Last.	AP	P: Rec Outstanding To Trans - TEST ALPH	A - JUDITH PC LOCAL - F	REPORTS DASHBOARD V1.2.0.3		- 🗆 ×
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- The Edit Names screen will be displayed.
- Make the required changes.
- Click on Ok.

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						User	JudithM 23/01/2020 Version : 1.2.0	0.3 TEST ALPHA - JUDITH	PC LOCAL



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

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

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- A list of actions will be displayed.
- Select the required action.



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

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- 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.

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

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

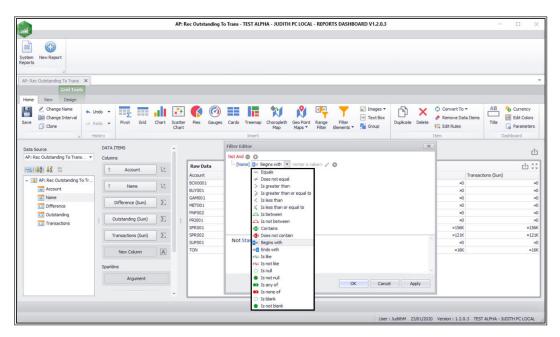
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• Click on any one of the **green text**. (These are all the **methods** of filtering available in this data grid.)

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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.

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

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1.2 Transactions	SPR001		×156K	×156K
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• Your filter search parameters needs to be appropriate to the newly selected column and method.



• Click on the **enter a value** text.

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- 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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- 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.

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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.



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

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### **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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- 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