

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 [adding](#) or [editing](#) dashboard items, there are multiple options you can use to customize your dashboard report.

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

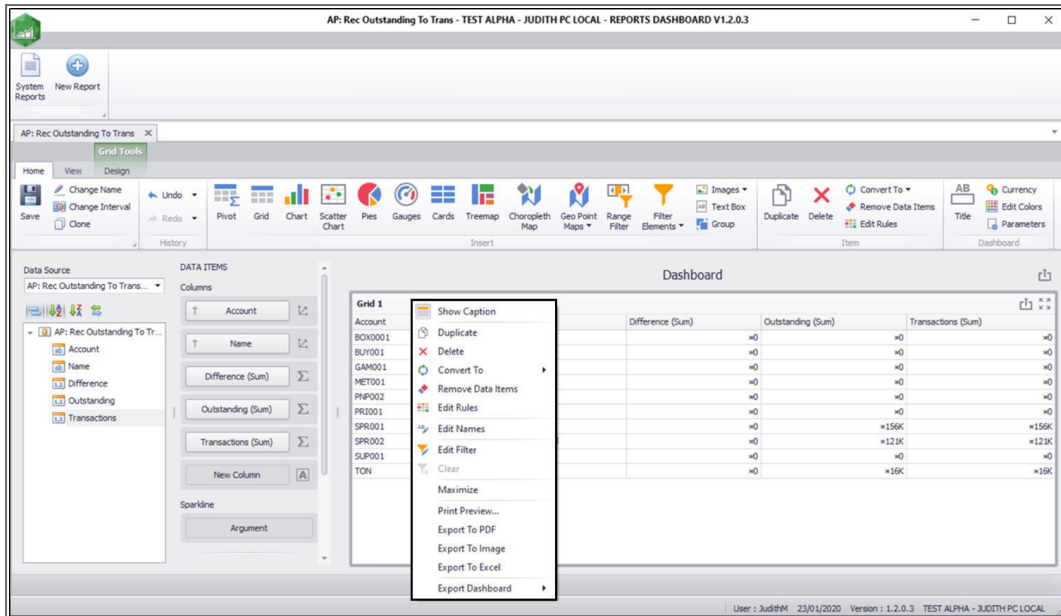
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The **Reports Dashboard** application will open.

### DASHBOARD MENU OPTIONS

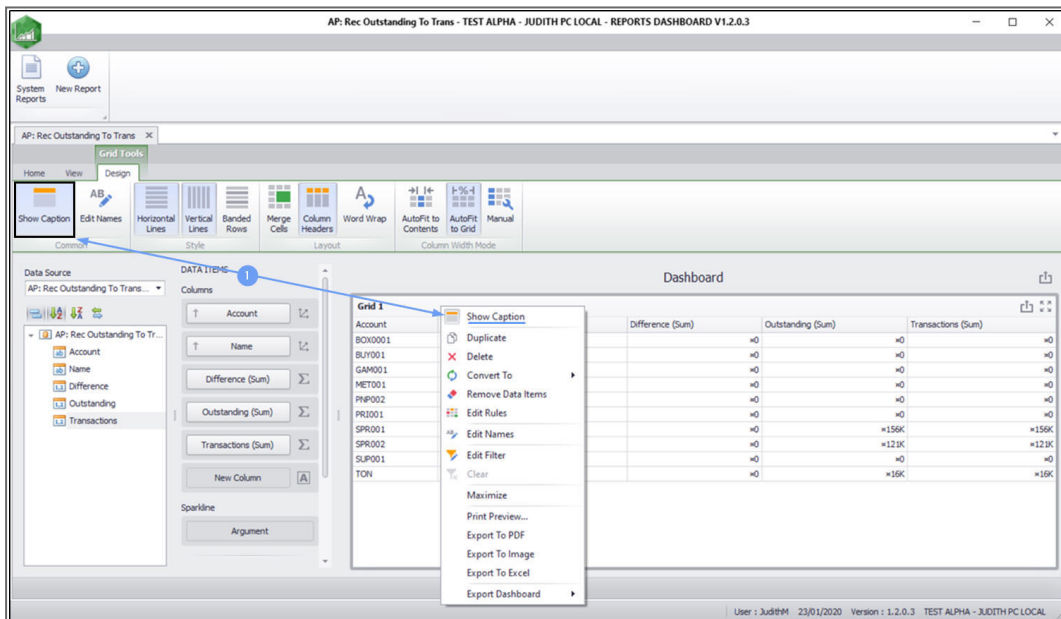
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- When [adding](#) or [editing](#) a dashboard, if you right click on a dashboard item **column header** or **title**, a **menu** with additional options will be displayed.
  - **Note:** Some of the options displayed in the right click menu are pertinent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

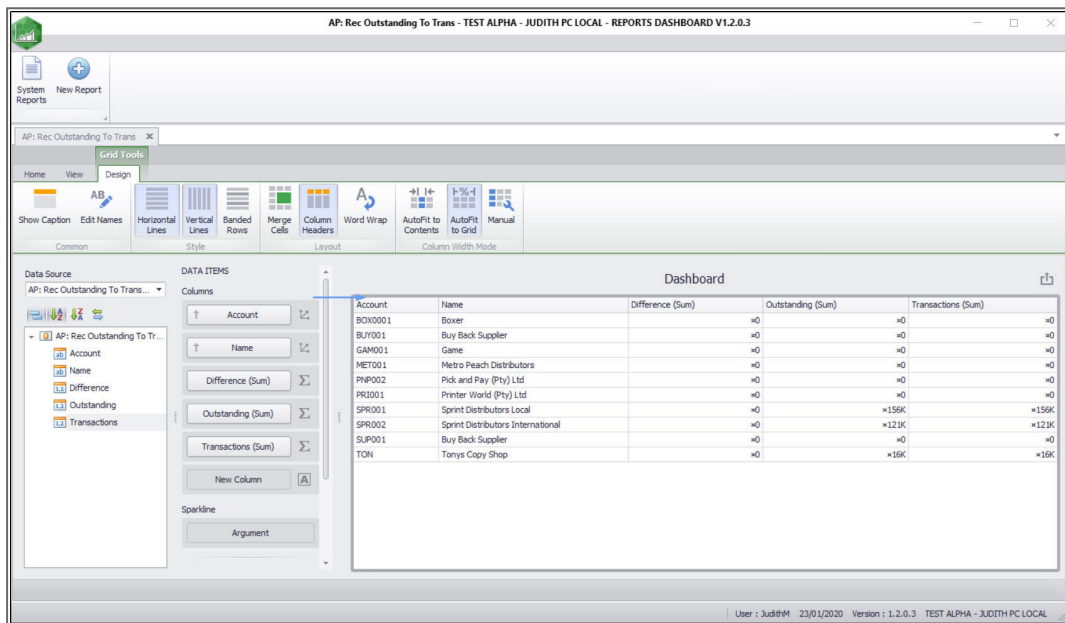


## SHOW OR HIDE DASHBOARD ITEM TITLE

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

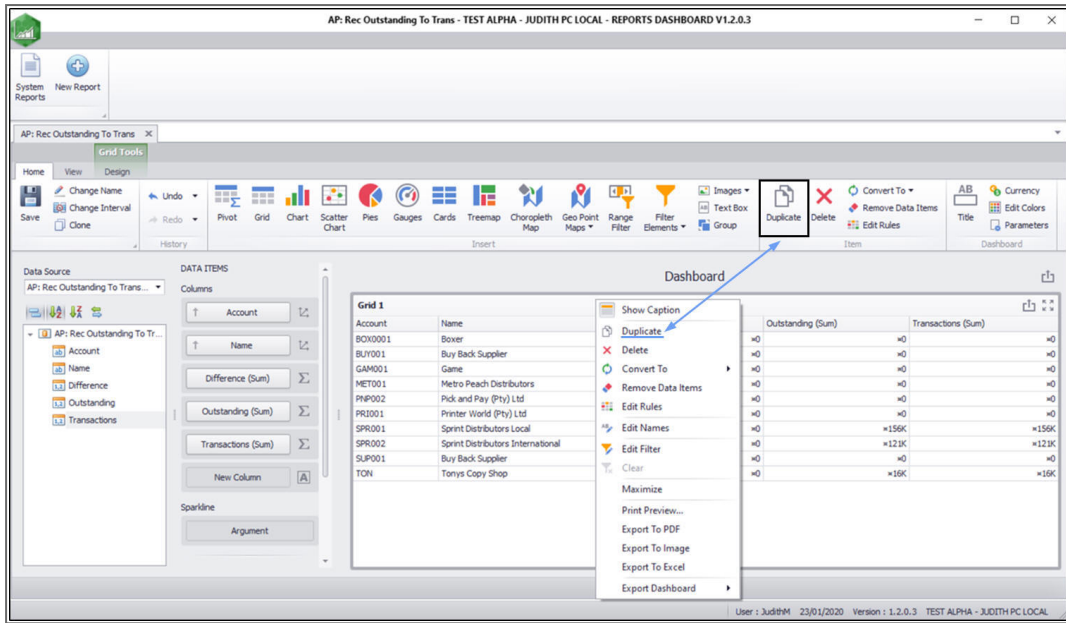


1. The **Show Caption** button on the **Ribbon** will become disabled ('whit-ish' in colour).
2. The **title** of the selected control type (dashboard item) will no longer be displayed.
  - **Note:** To display the **title** of the selected control type (dashboard item) again, repeat the previous step.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

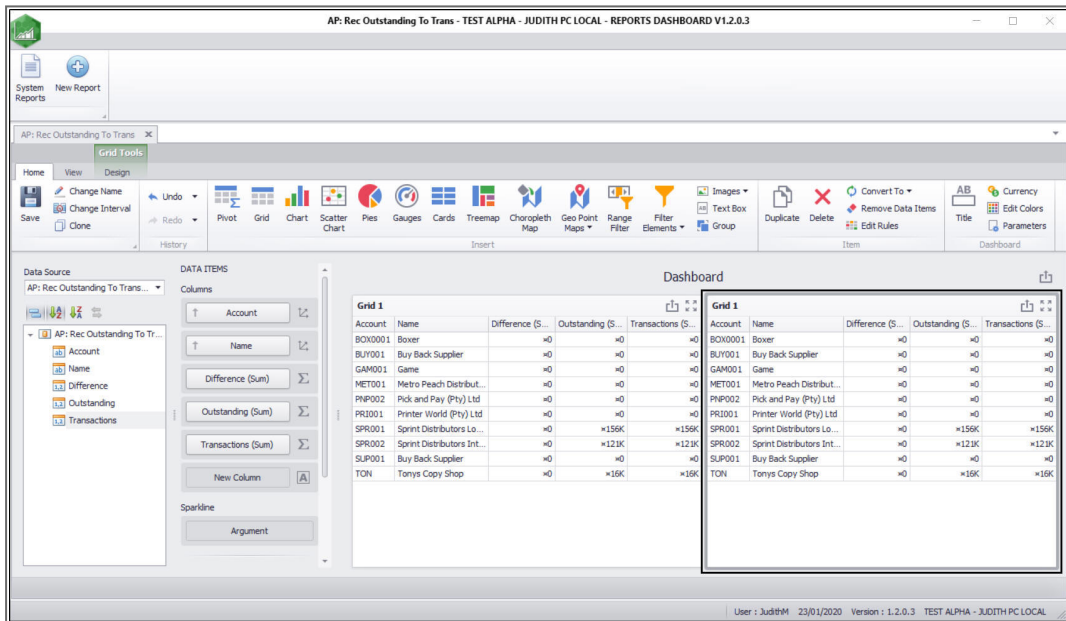


## DUPLICATE A DASHBOARD ITEM

- To duplicate a selected control type (dashboard item), click on **Duplicate** on either the **Home** tab or the **right click menu**.

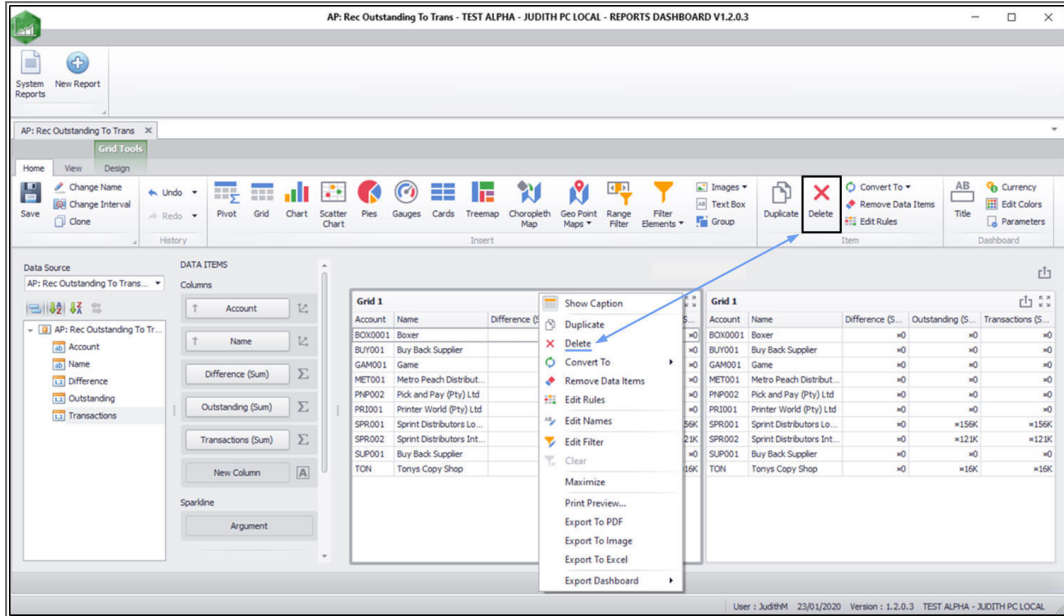


- A duplicate of the selected control type (dashboard item) will be displayed.

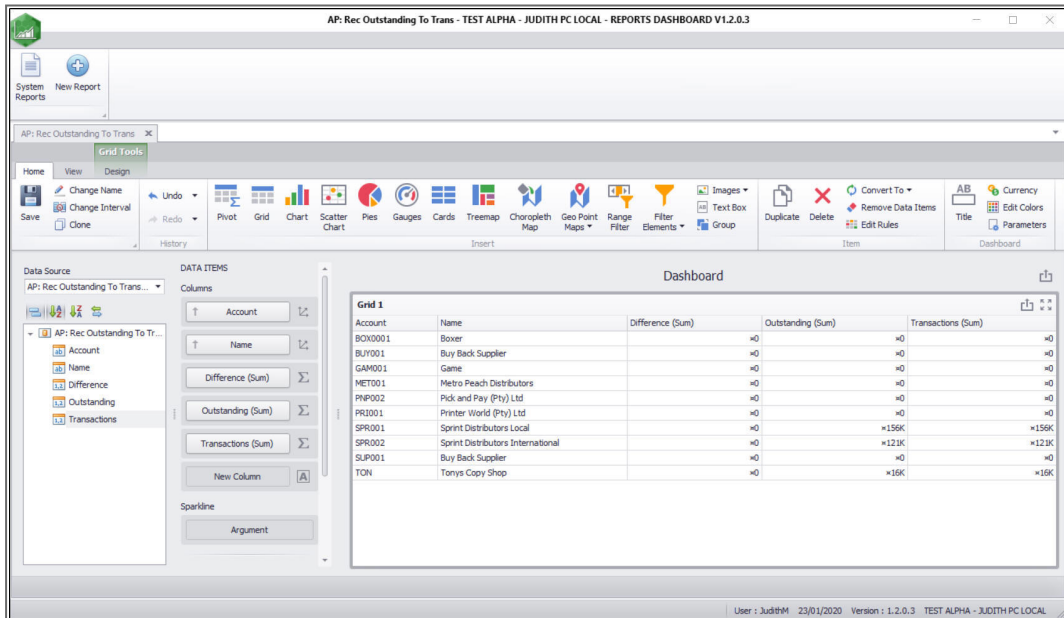


## DELETE A DASHBOARD ITEM

- To delete a selected control type (dashboard item), click on **Delete** on either the **Home** tab or the **right click menu**.

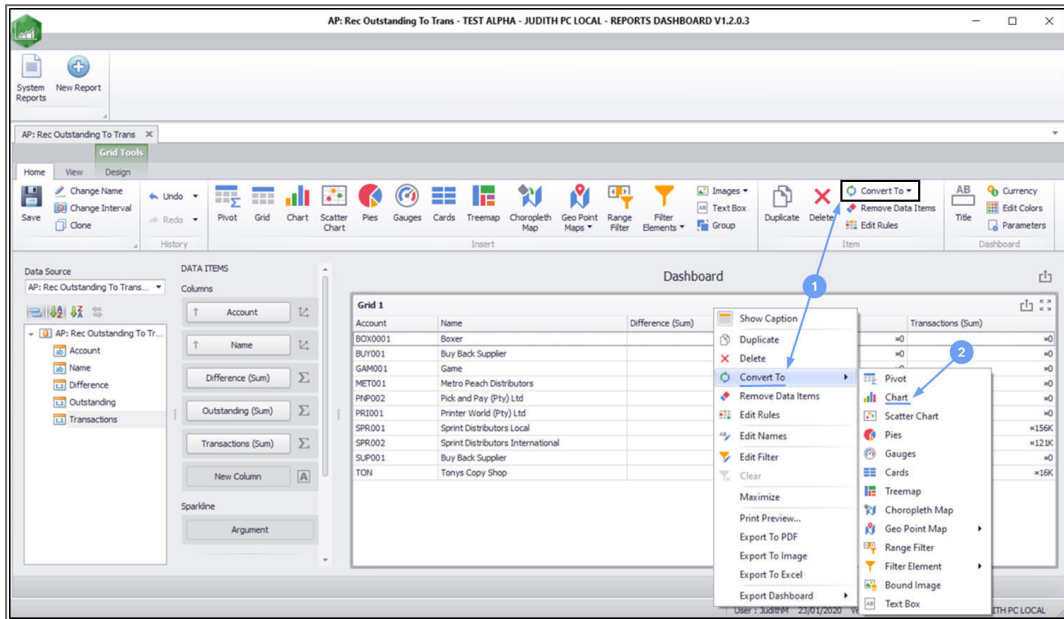


- The selected control type (dashboard item) will be deleted.

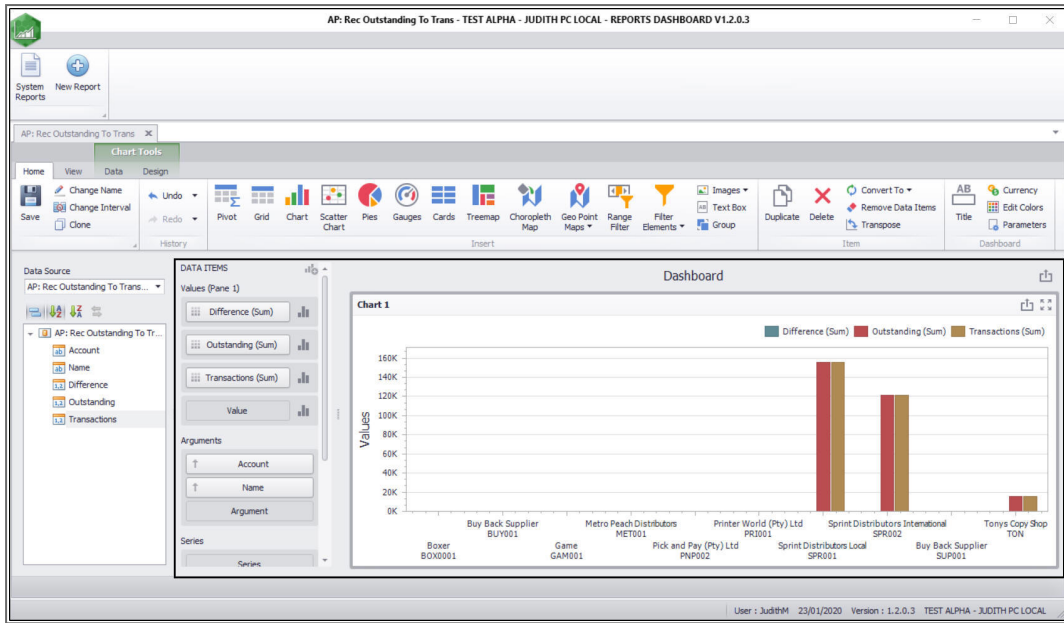


## CONVERT A CONTROL TYPE

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.

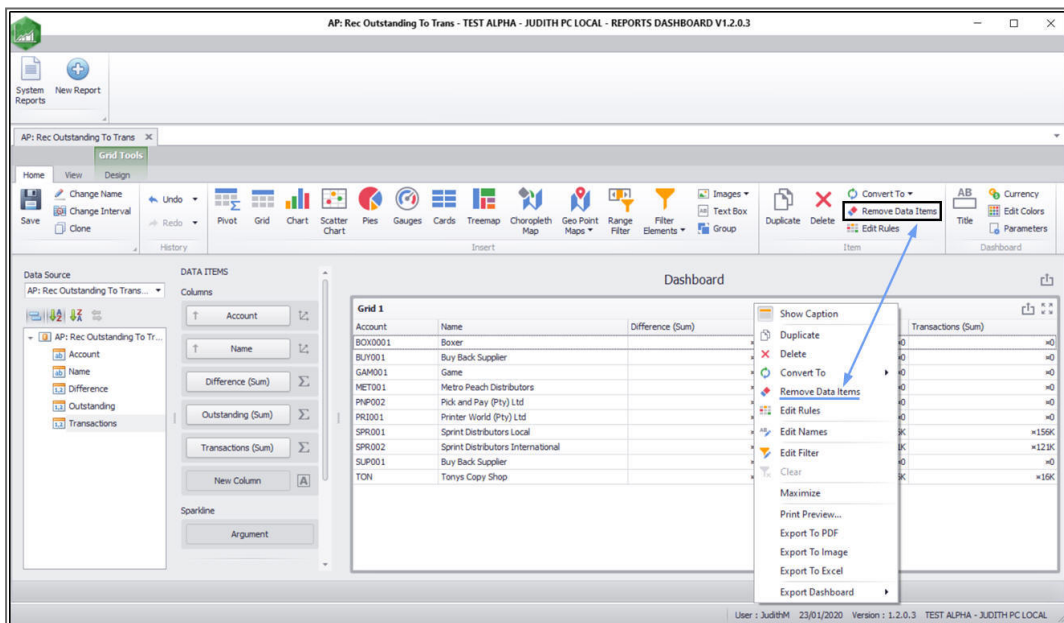


- The control type (dashboard item) will be converted to the selected control type.
  - In this image, a **Chart** is now displayed.

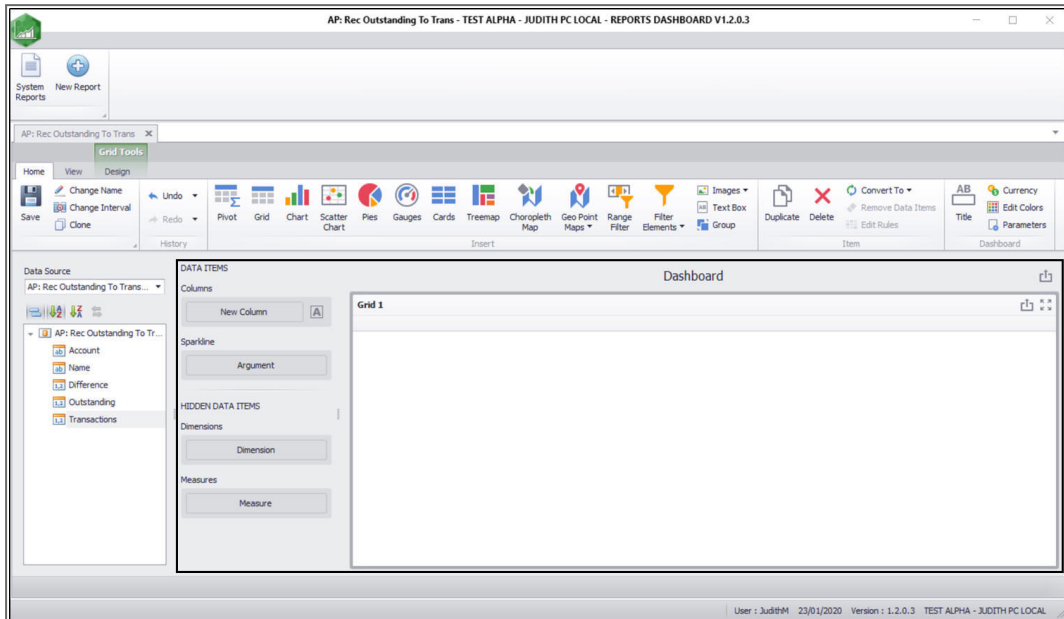


## REMOVE DATA ITEMS FROM A DASHBOARD ITEM

- 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**.



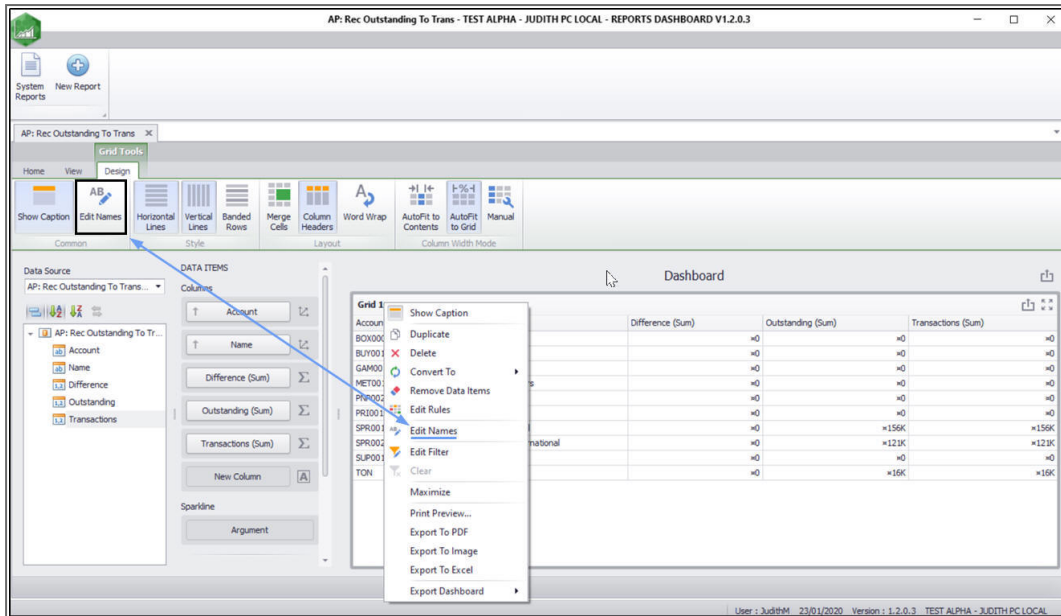
- The data items of the selected control type (dashboard item) will be removed.



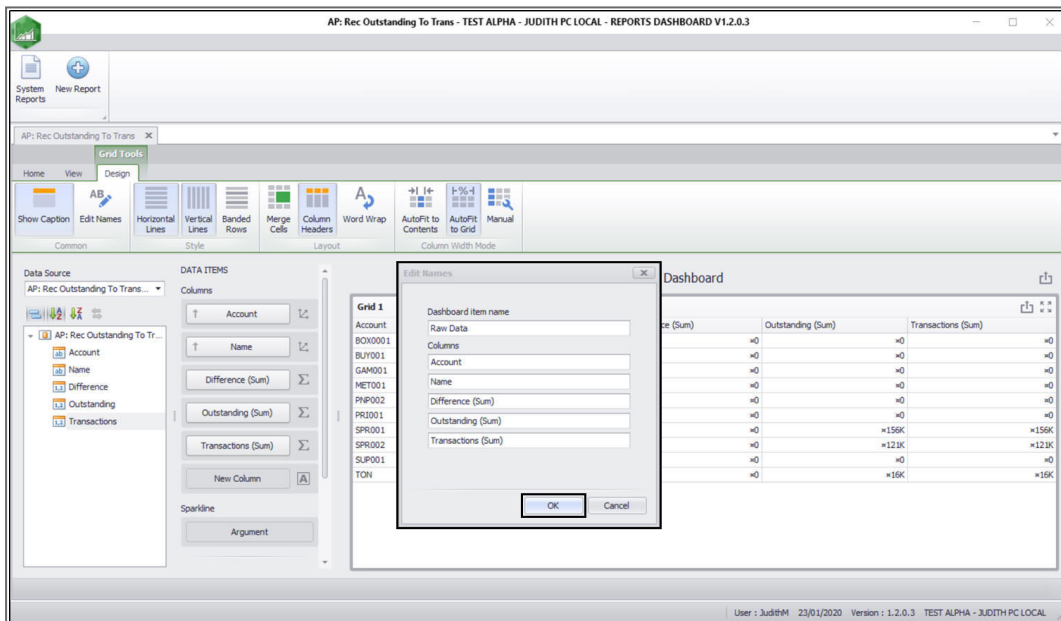
## RENAME A DASHBOARD ITEM TITLE AND OR COLUMNS

- 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**.

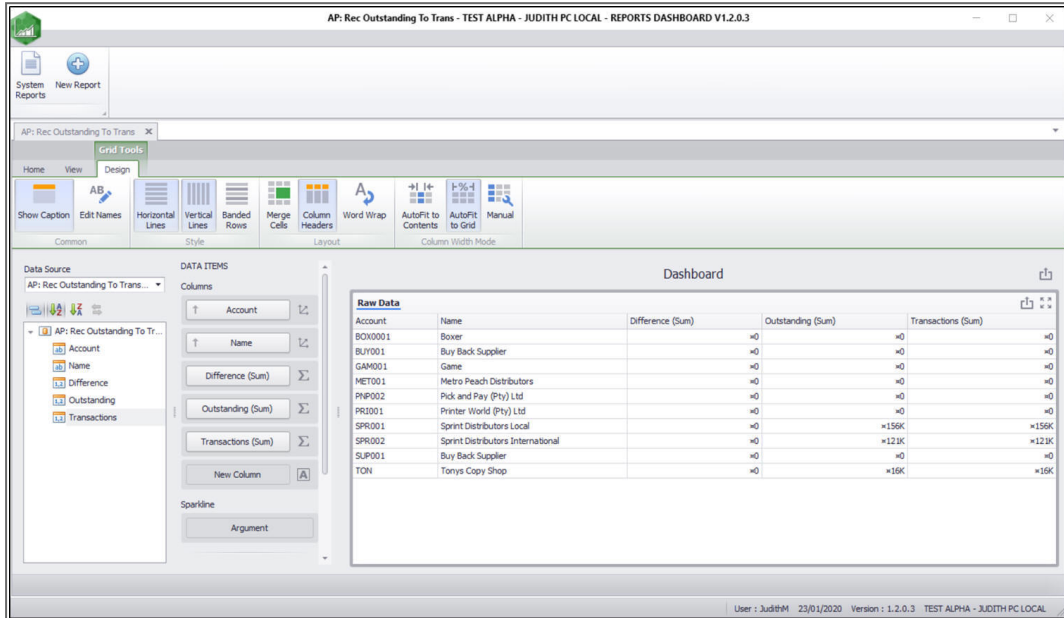




- The **Edit Names** screen will be displayed.
- Make the required changes.
- Click on **Ok**.

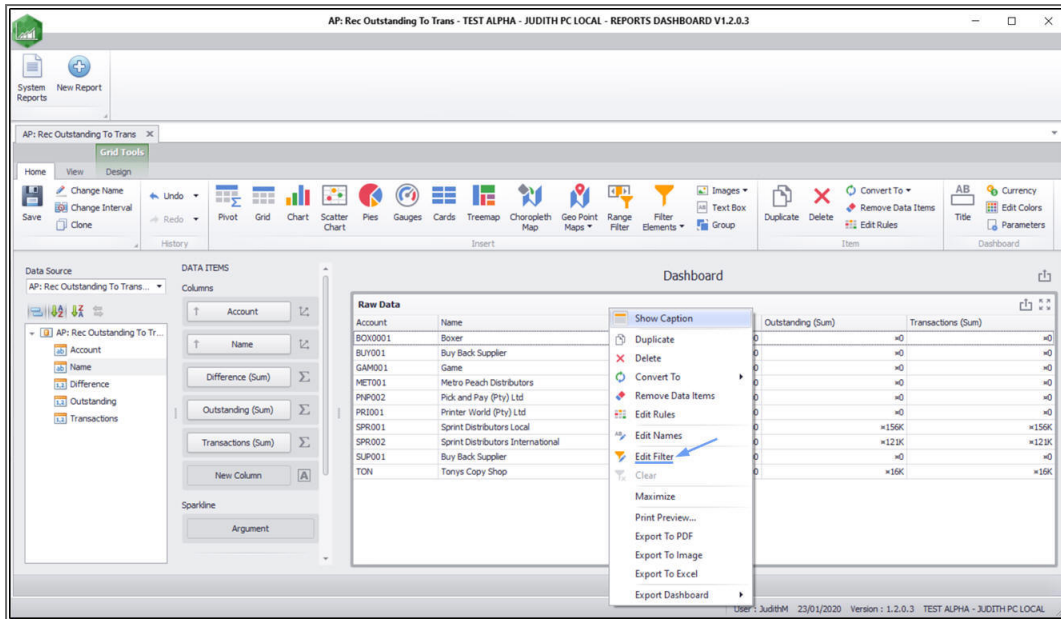


- The changes will be saved.
  - In this image, the **title** of the selected control type (dashboard item **title**) has been changed from **Grid 1** to **Raw Data**.

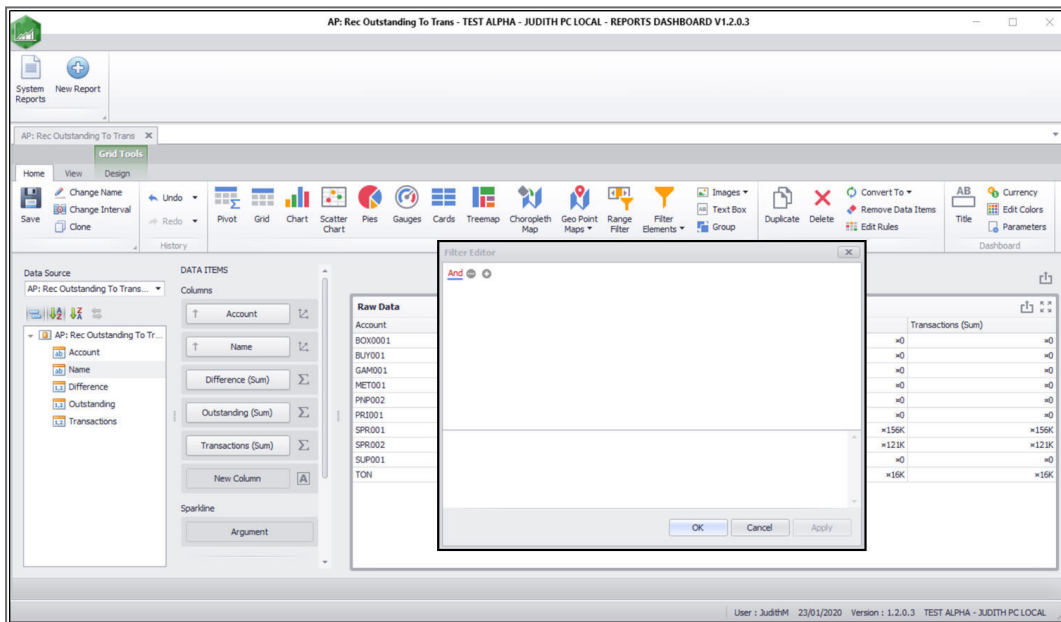


## EDIT DASHBOARD ITEM FILTER

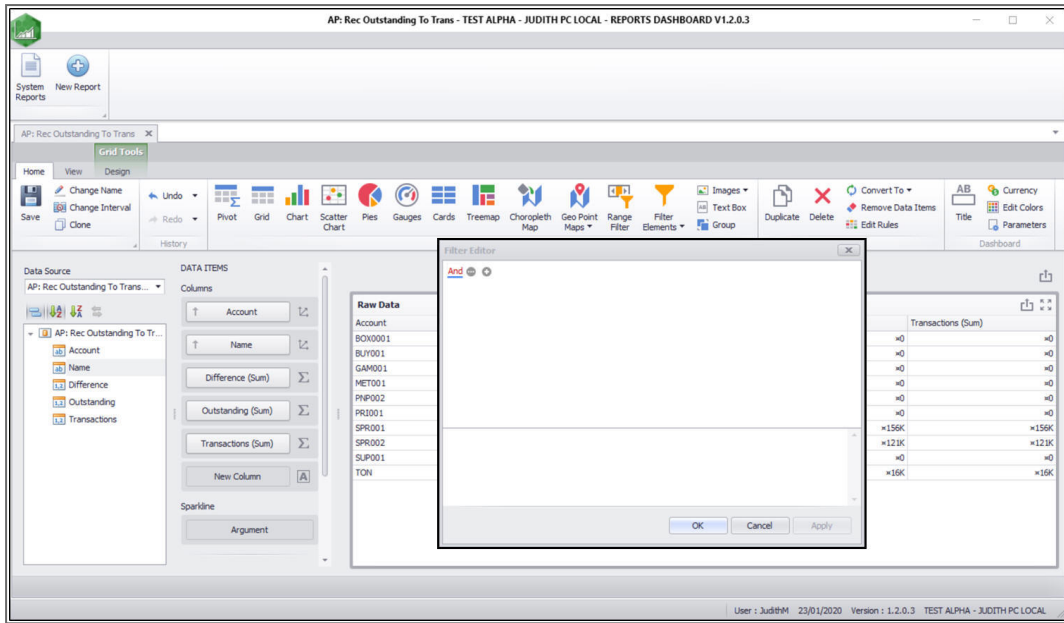
- To add / edit column filters of a selected control type (dashboard item), click on **Edit Filter** on the **right click menu**.



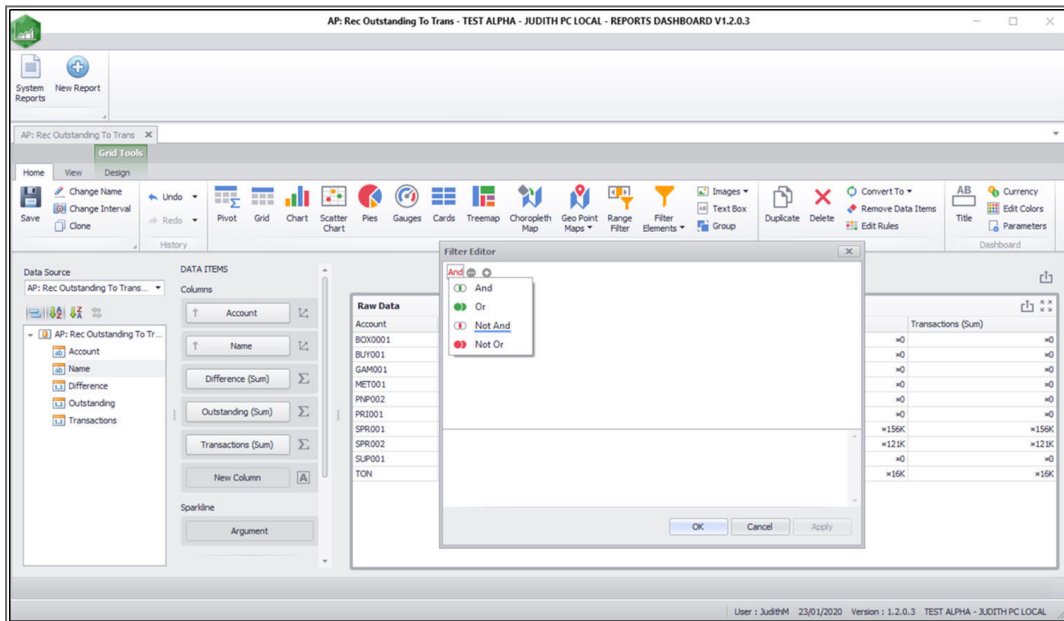
- The **Filter Editor** screen will be displayed.
- Click on the **red 'And'** text in the **Filter Editor**.



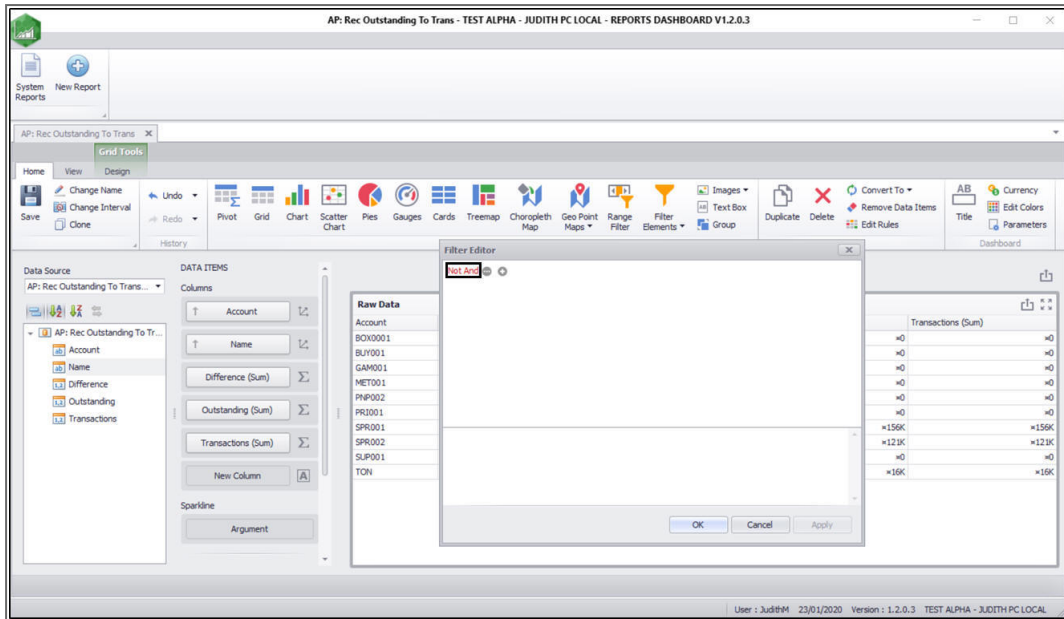
- This will bring up a **drop-down menu** with options to change the current filter selections.



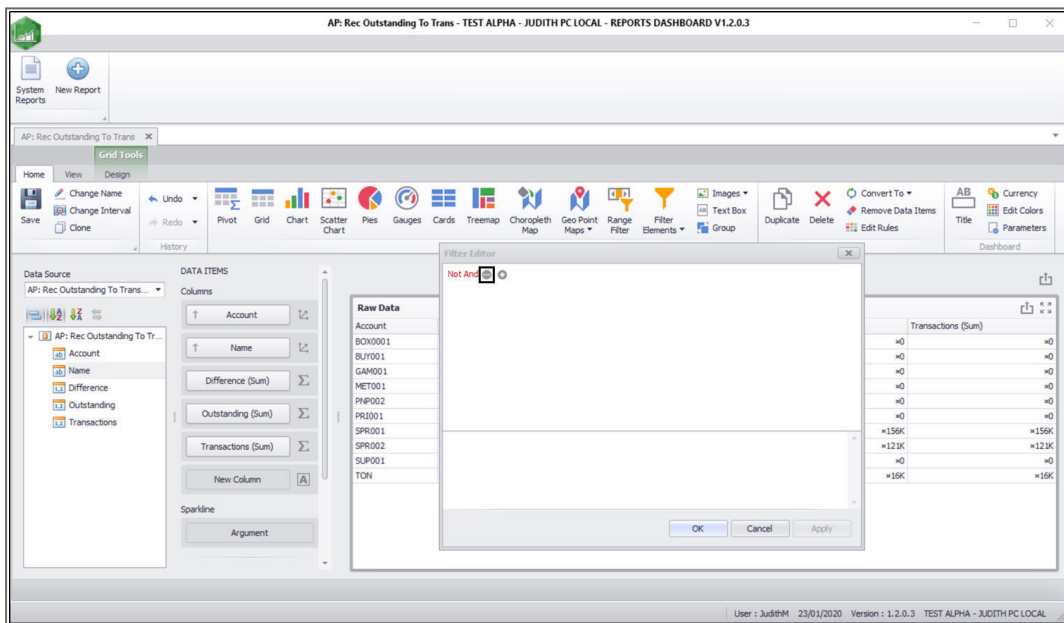
- Click on any one to make changes to the filter selection.
- In this image, **Not And** has been selected.



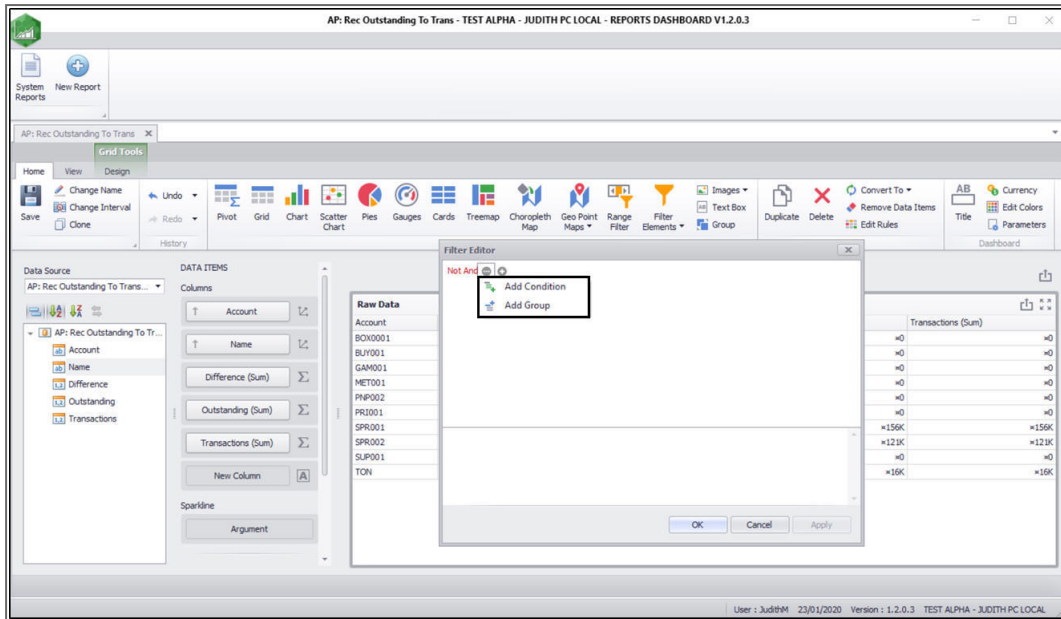
- **Not Add** instead of 'And' is now displayed in the **Filter Editor**.



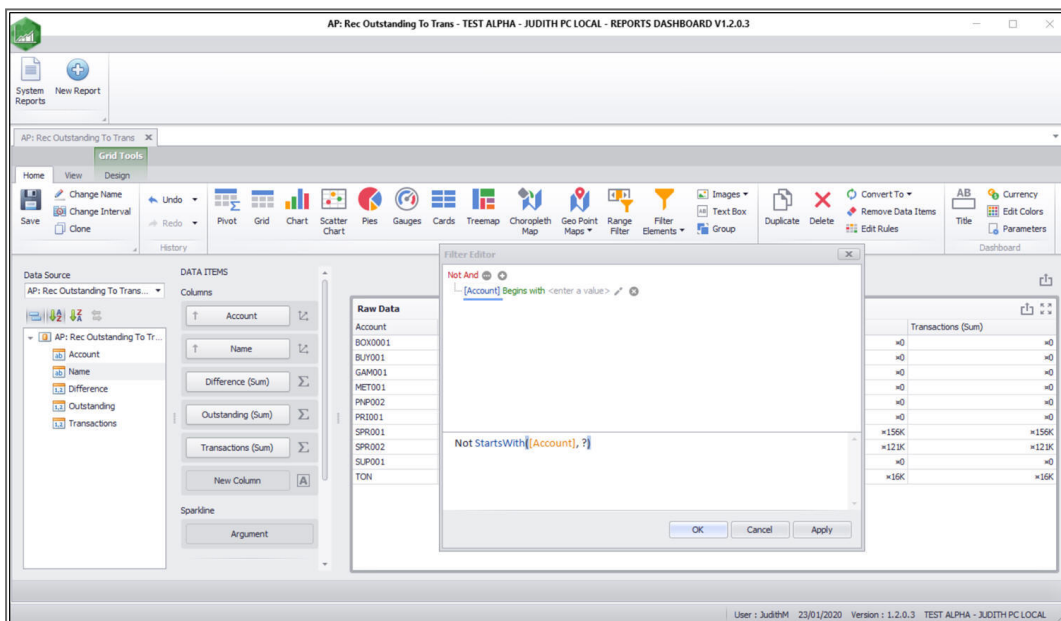
- In the **Filter Editor**, click on the **Action** button.



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



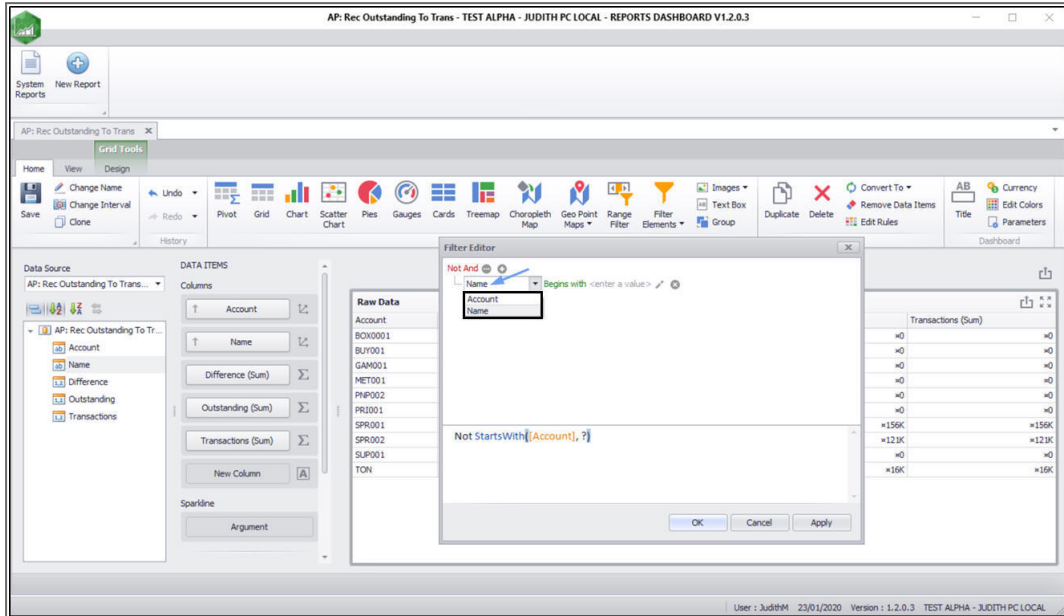
- The selected action will be displayed.
- Click on the **blue text** in brackets (these are the column titles).



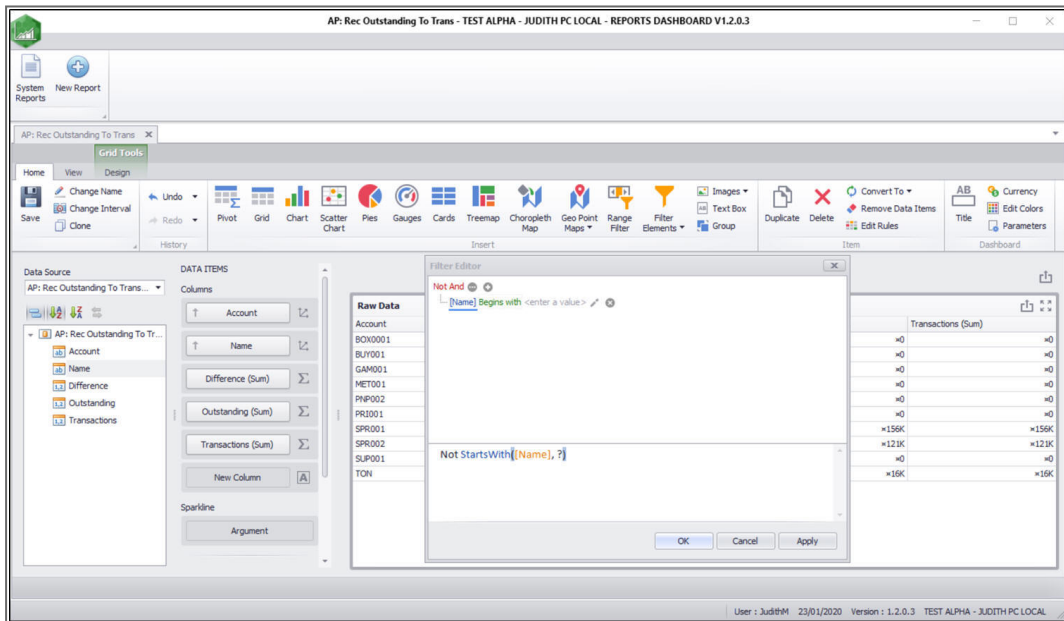
- A list of titles will be displayed.
- Click on any of these titles to **change** the column that is being

filtered.

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

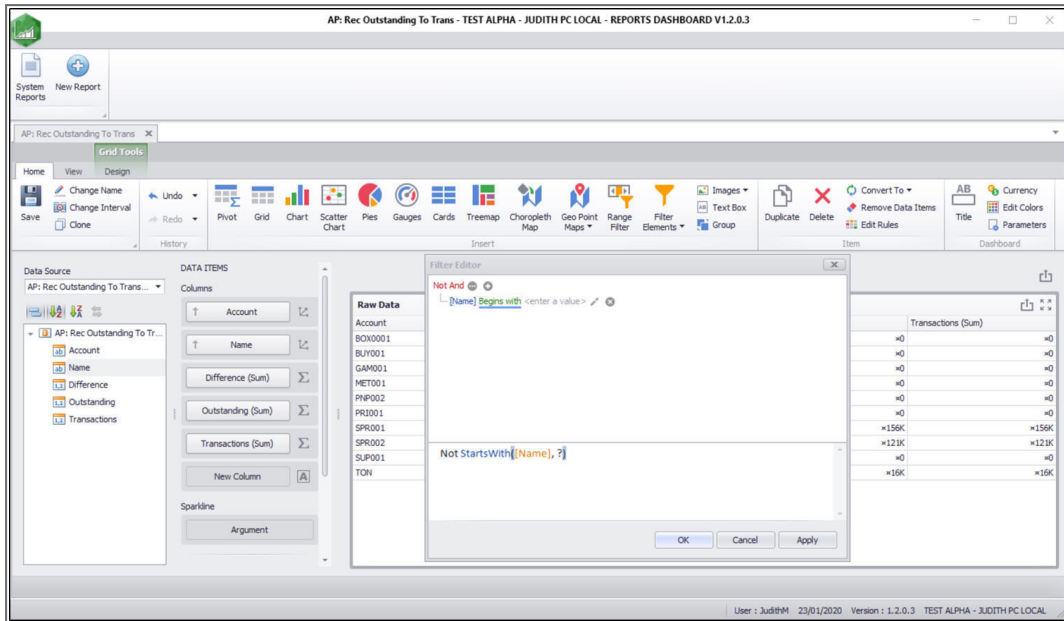


- In this image, the **Filter Editor** will now displays **Name** as its column filter instead of **Account**.

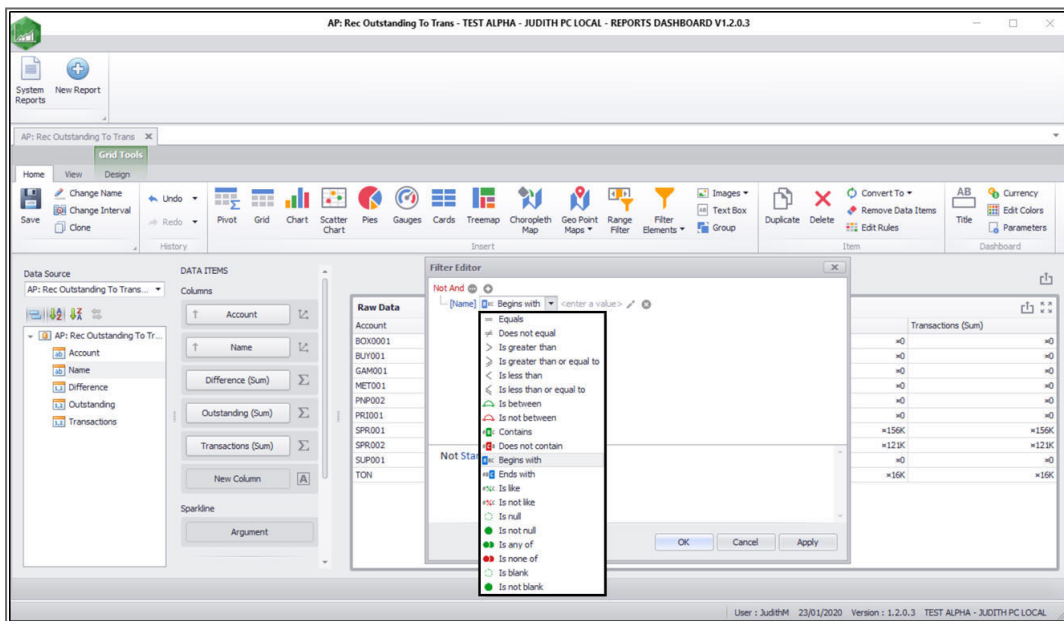




- Click on any one of the **green text**. (These are all the **methods** of filtering available in this data grid.)

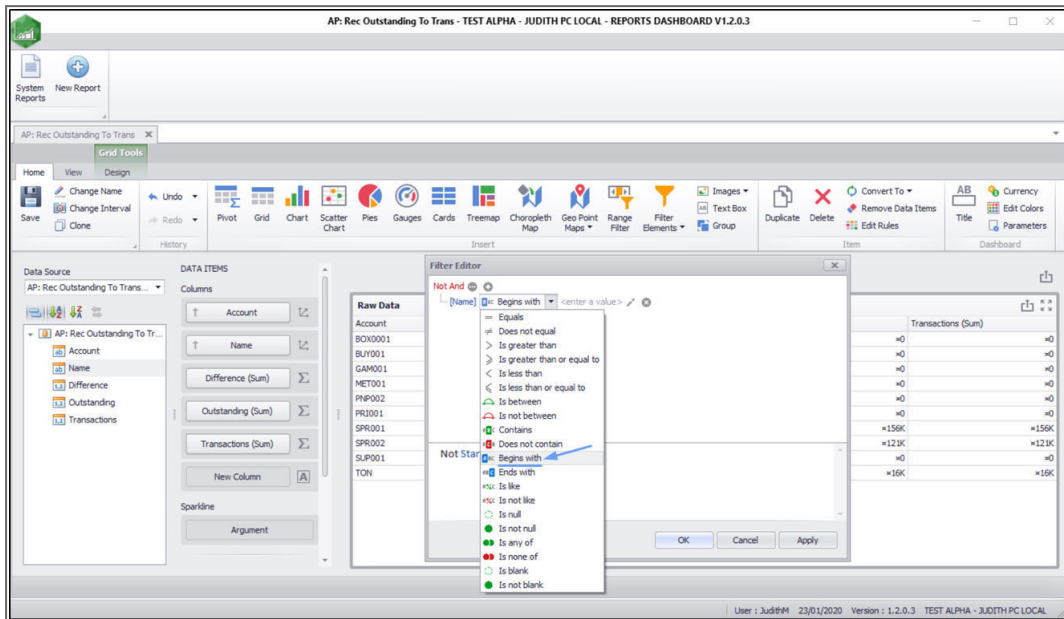


- A pop up menu will display a list of the filter **method options** for the selected column.

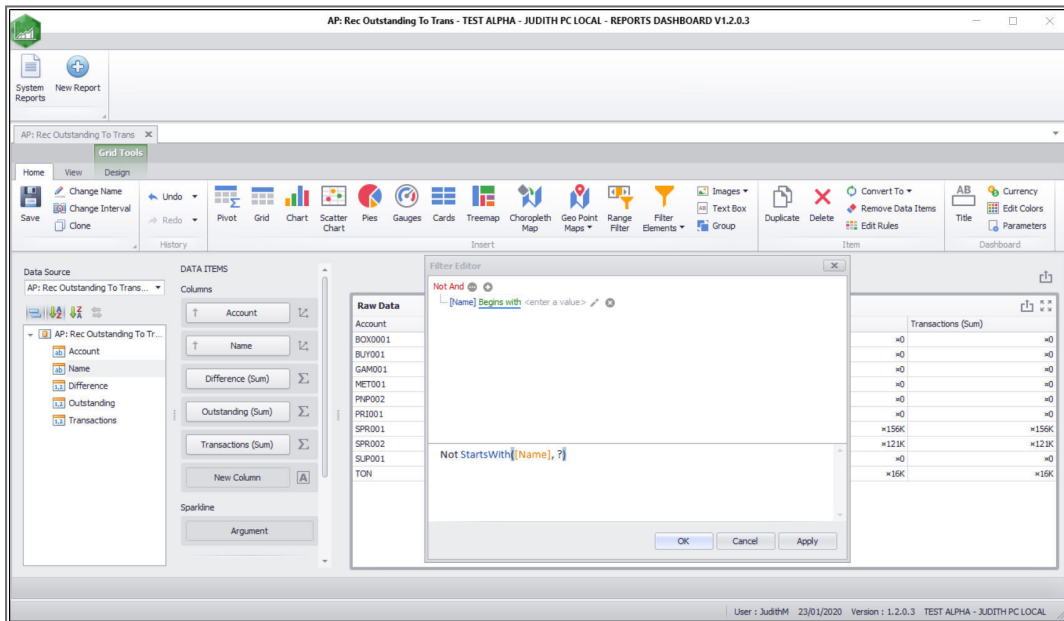




- Click on any one of these to select the **filter method** required.
- In this image the filter method **Begins with** has been selected.

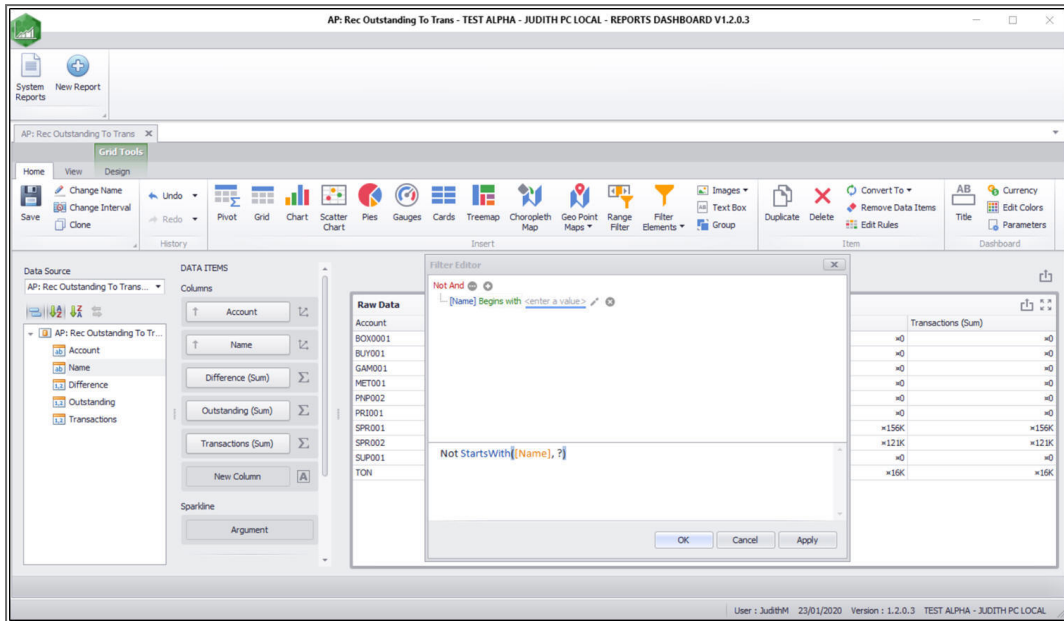


- The **Filter Editor** will now display this filter method choice.

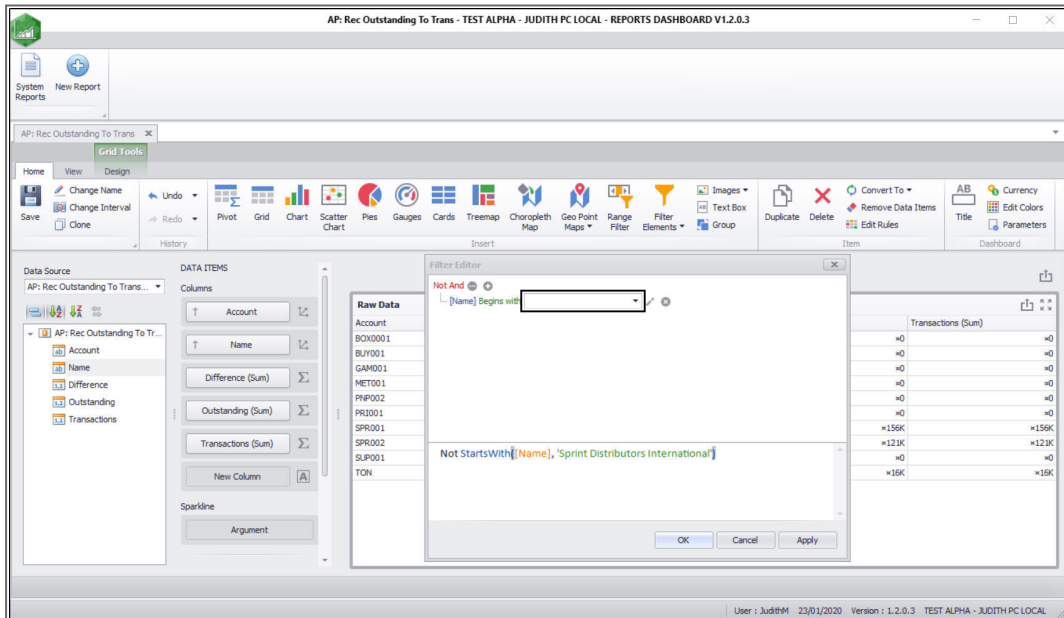


- Your filter search parameters needs to be appropriate to the newly selected column and method.

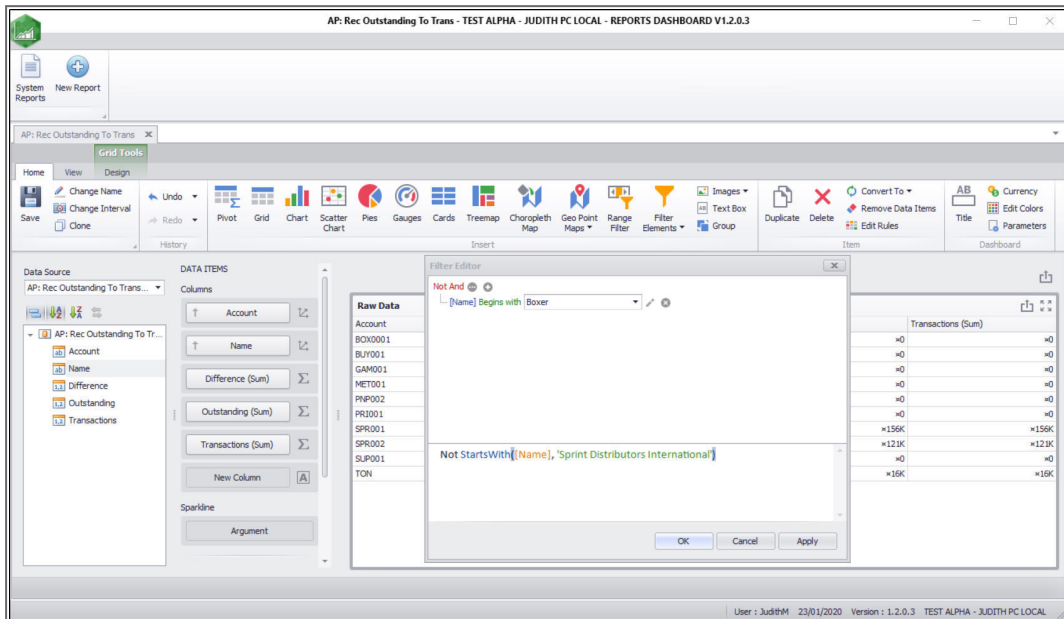
- Click on the **enter a value** text.



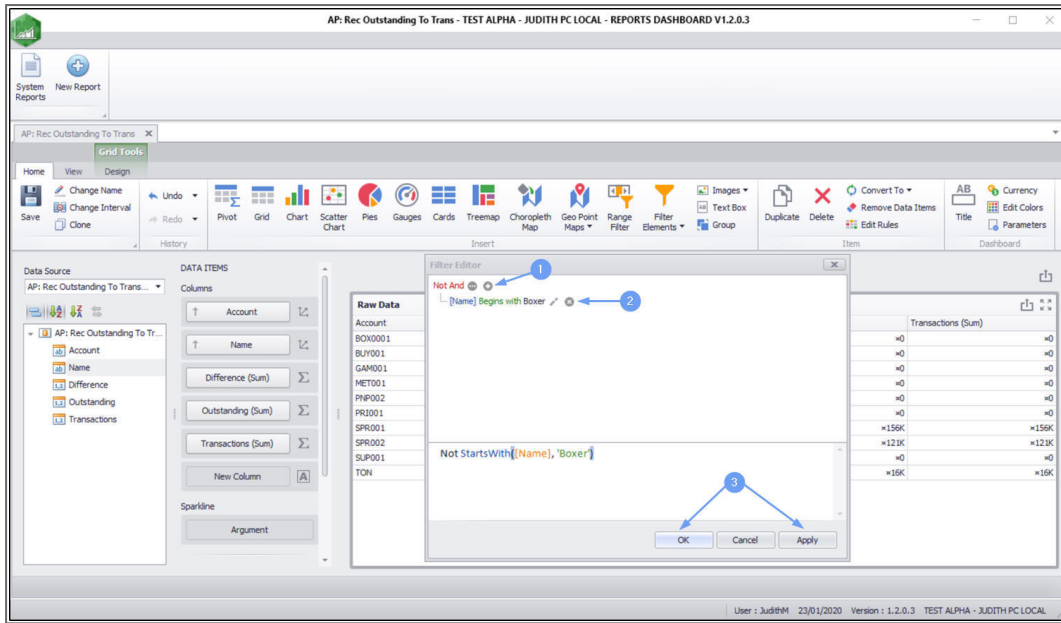
- A **text box** will appear.
- Type in or click on the **down arrow** and select an appropriate columns parameter that applies to this particular column ( **Name** ) and filter method ( **Begins With** ).



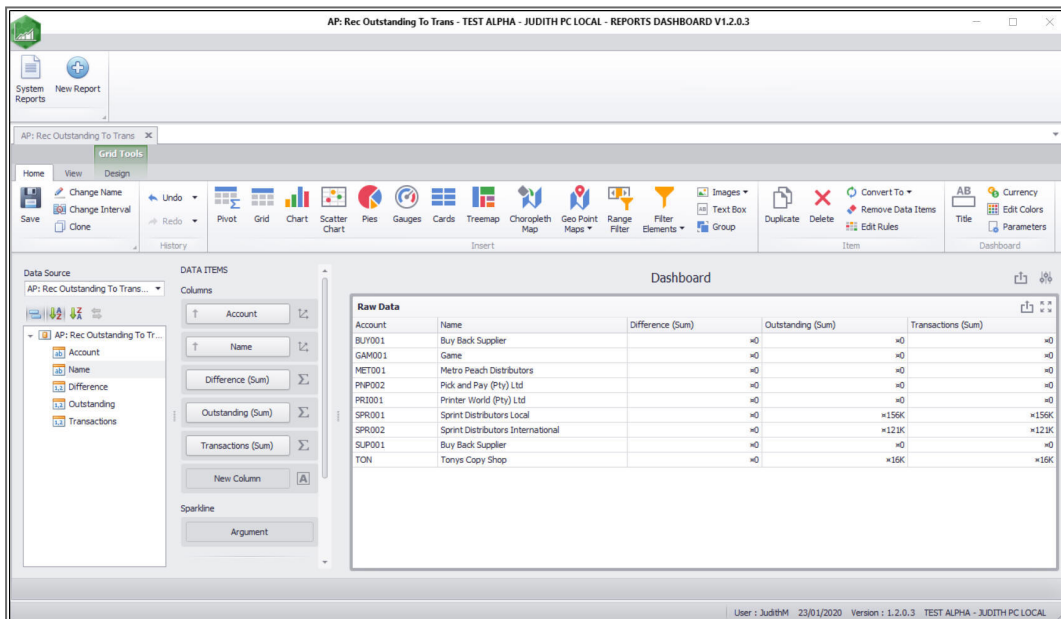
- The text box in the **Filter Editor** is not case sensitive, you can type in any part of a word or number.
- In this image, **Boxer** has been selected.



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.

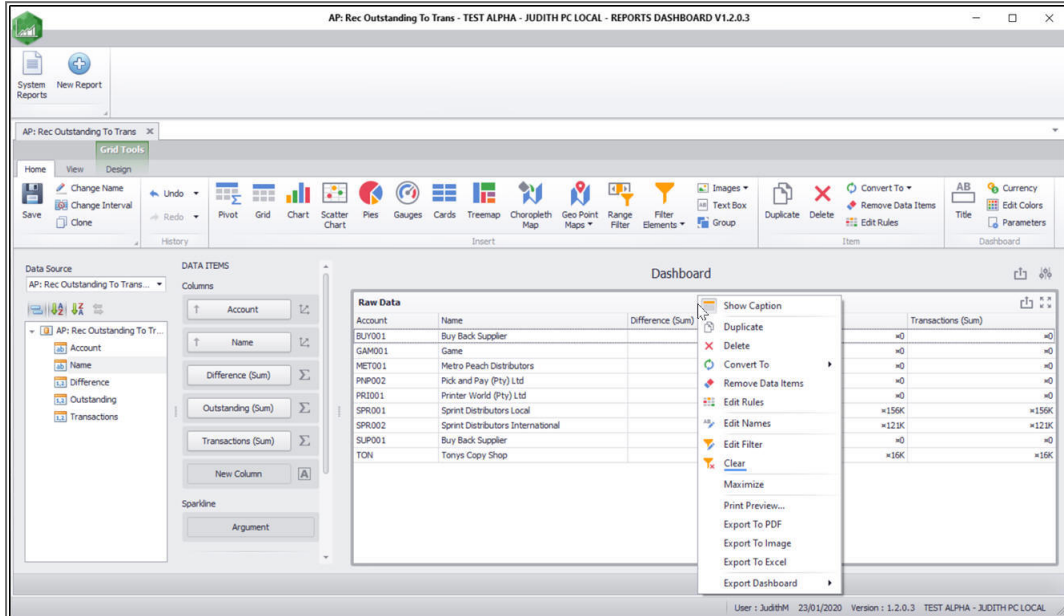


- The selected filter will be applied to the dashboard item.
- In this image, **Boxer** is no longer displayed in the dashboard item.

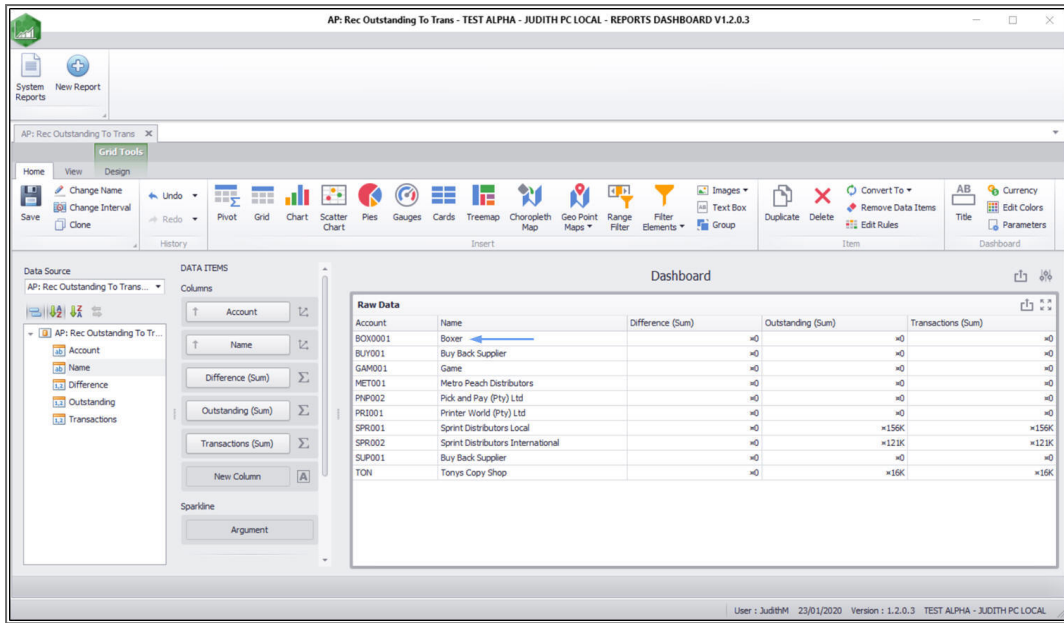


## CLEAR A DASHBOARD FILTER

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

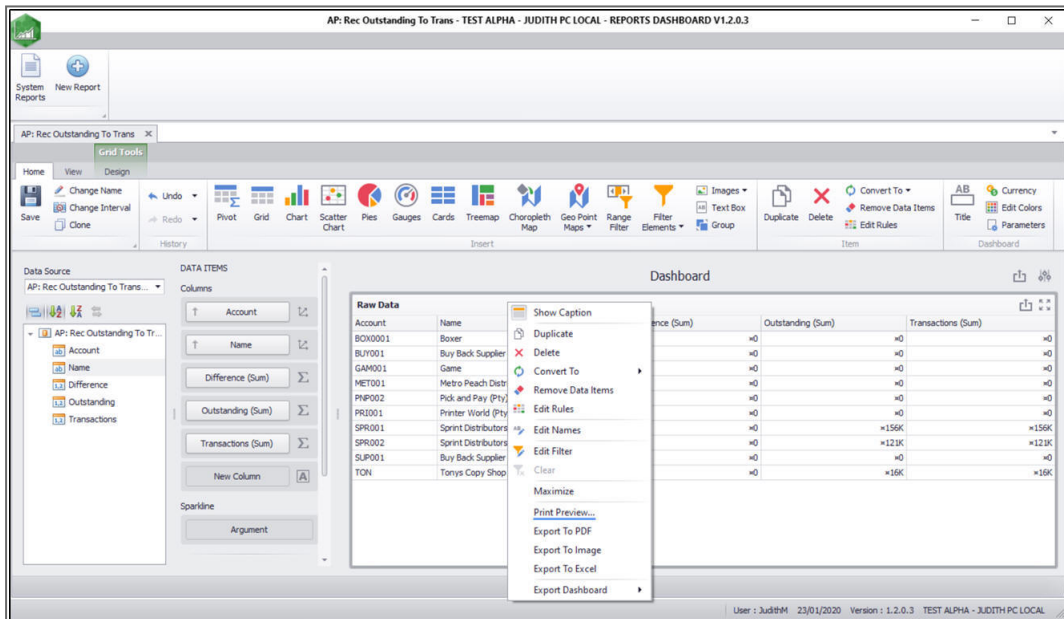


- The column filter will be cleared.
- In this image, **Boxer** is now displayed in the selected dashboard item.

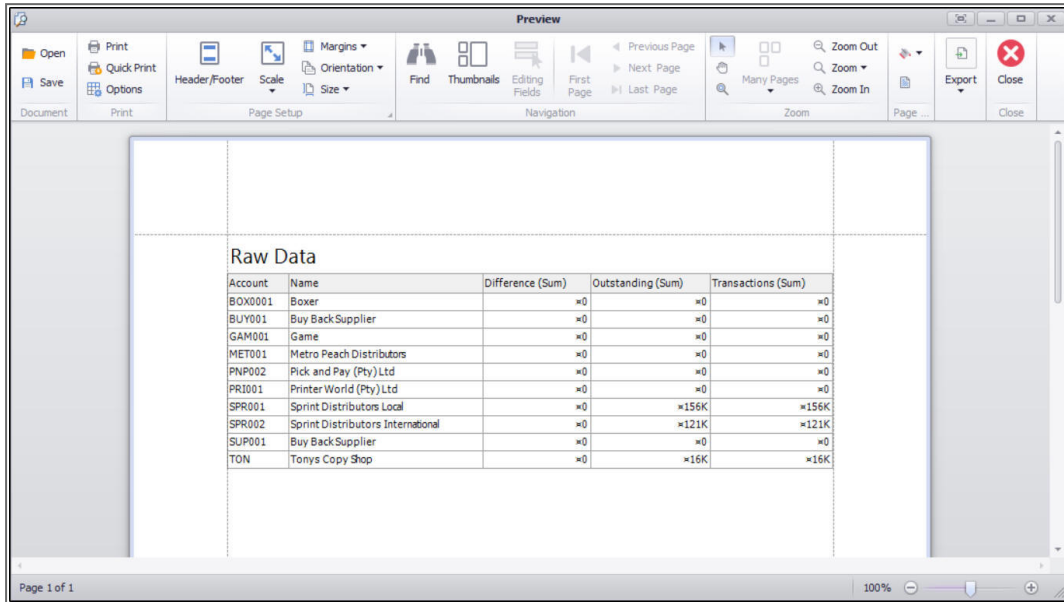


## PRINT PREVIEW A DASHBOARD ITEM

- Click on **Print Preview**.

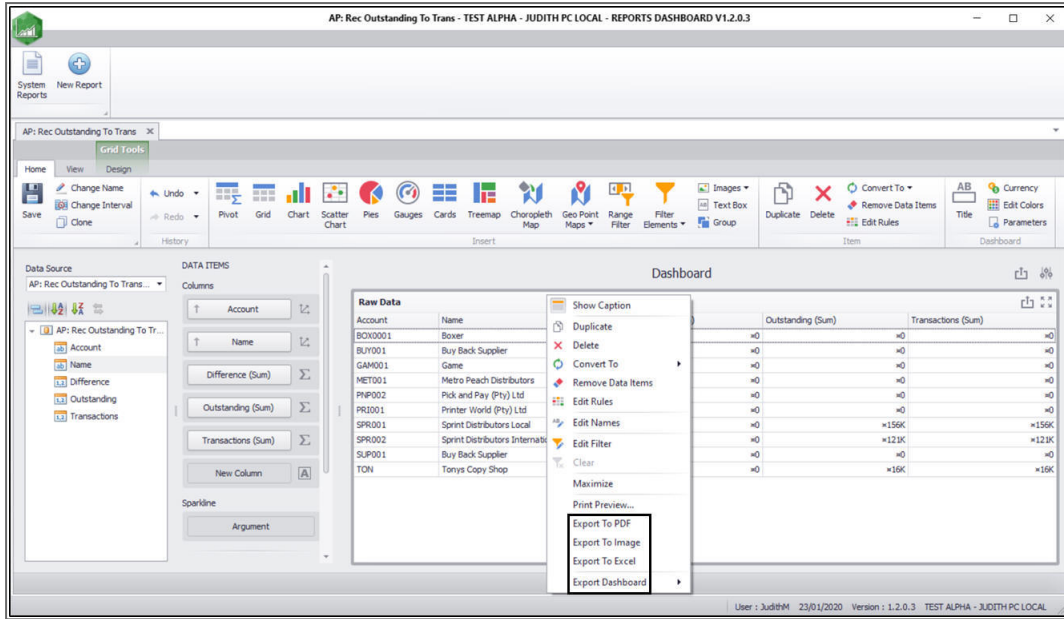


- The **Preview** screen will be displayed.
- You can now view the data contained in the dashboard item before printing.



## 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.



## Related Topics

- [Change dashboard report title](#)
- [Set default currency](#)
- [Edit dashboard colours](#)
- [Change report name](#)
- [Change report interval](#)
- [Clone Report](#)

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