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

REPORTS DASHBOARD

VIEW A REPORT

The **Reports Dashboard** application gives you the ability to view critical business information graphically in real time in form of dashboard reports. The information contained in the dashboard reports is refreshed periodically with the most current data related to the reports.

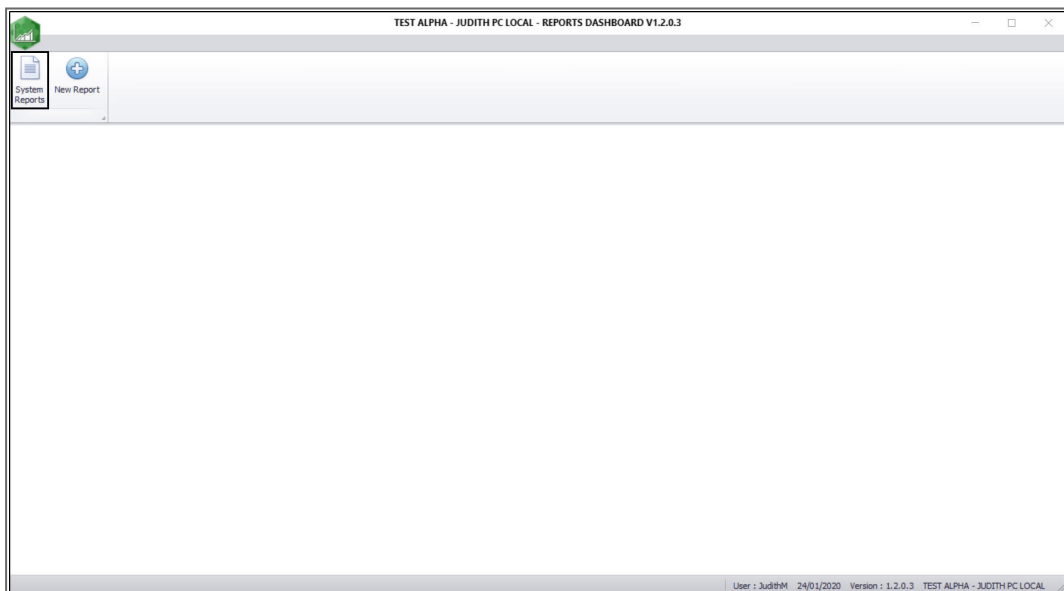In **Reports Dashboard**, you can view each report.

Access: Reports Dashboard Icon > Log In
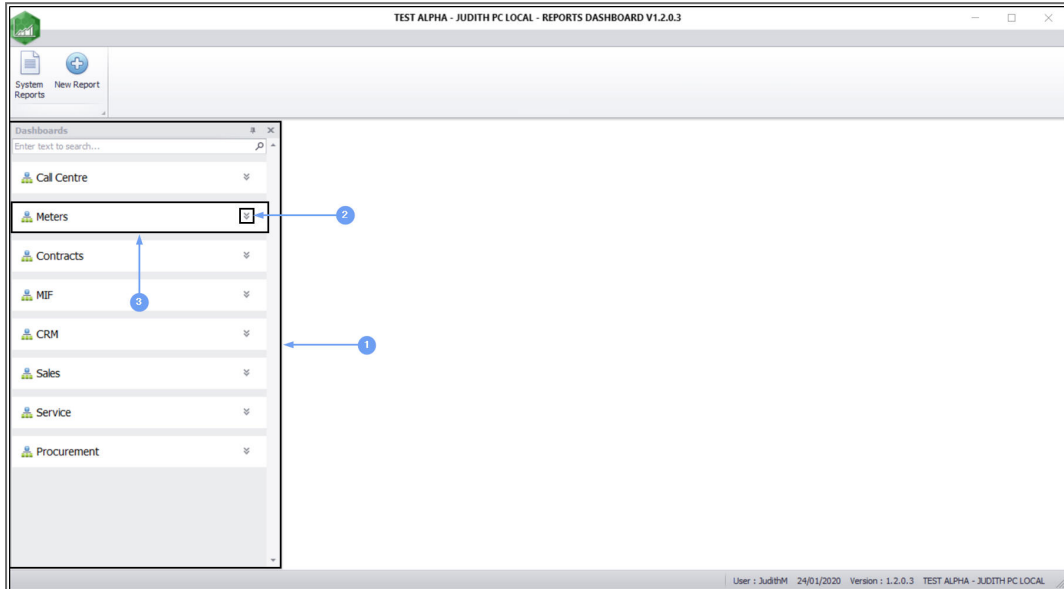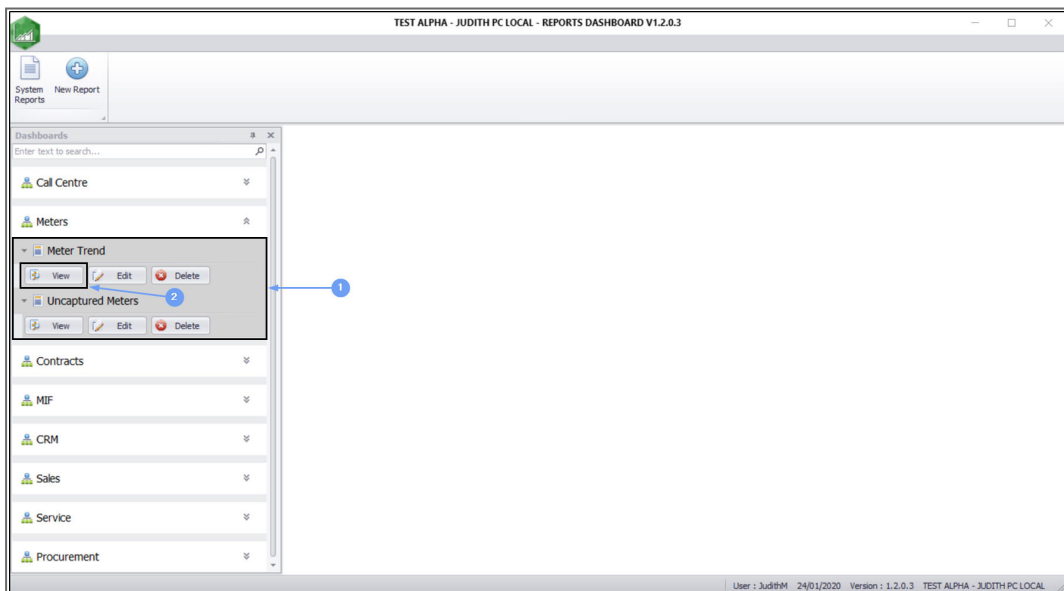
The **Reports Dashboard** application will open.

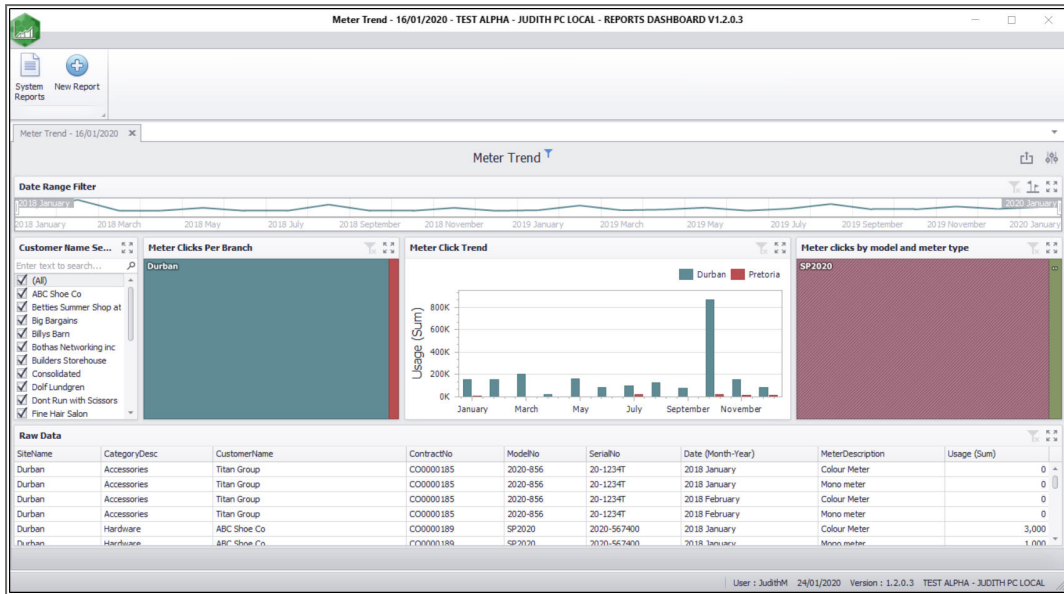- Click on the **System Reports** button.

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.
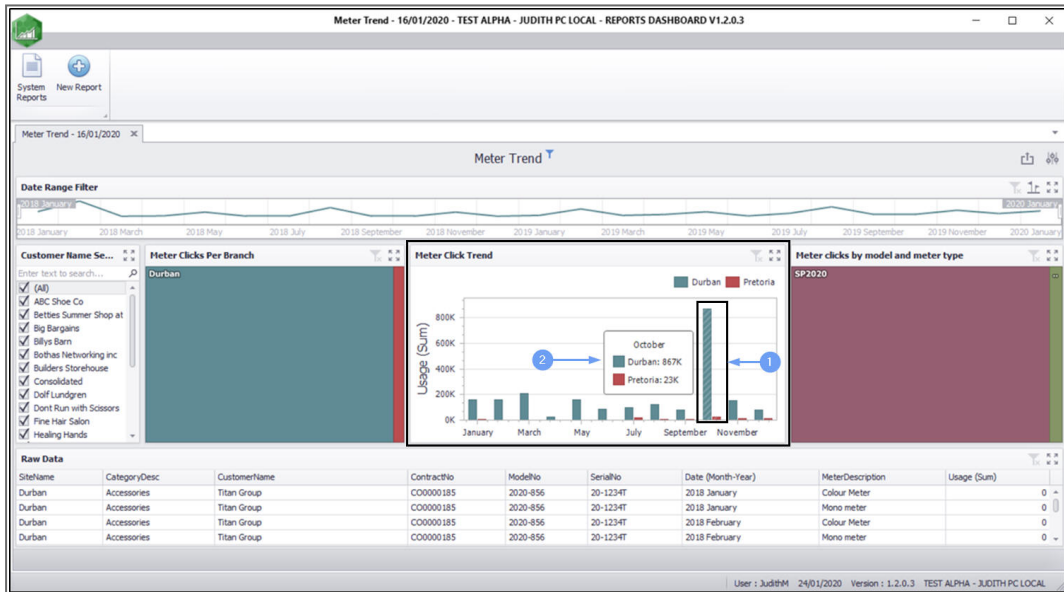   - In this image, **Meters** has been selected.

1. All the underlying 'active' reports in the selected category will be displayed.
2. Click on **View**.
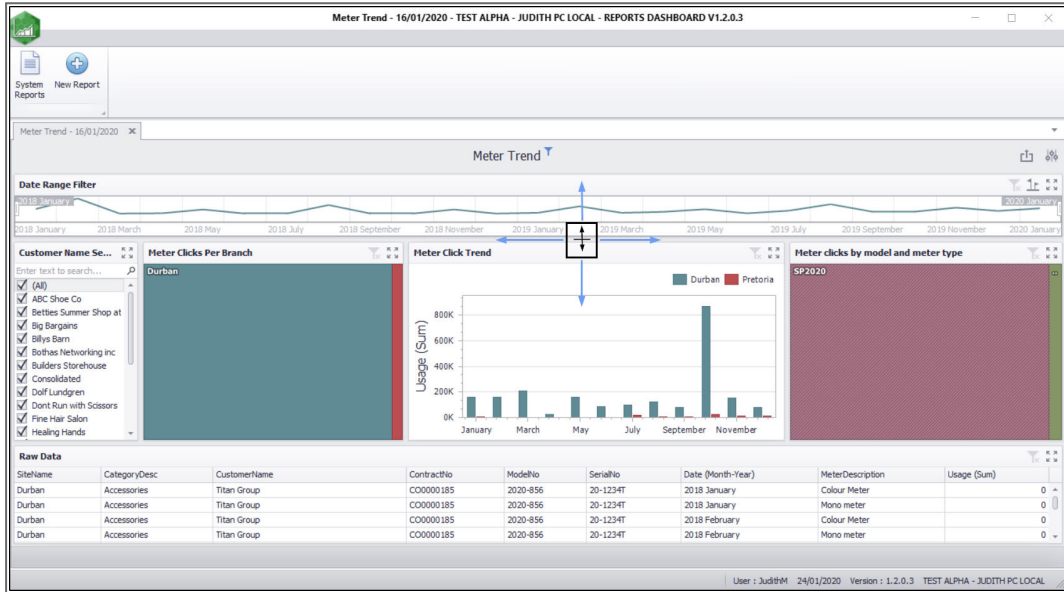
- The selected report will be displayed.

1. Hover over a data item in a selected dashboard item.
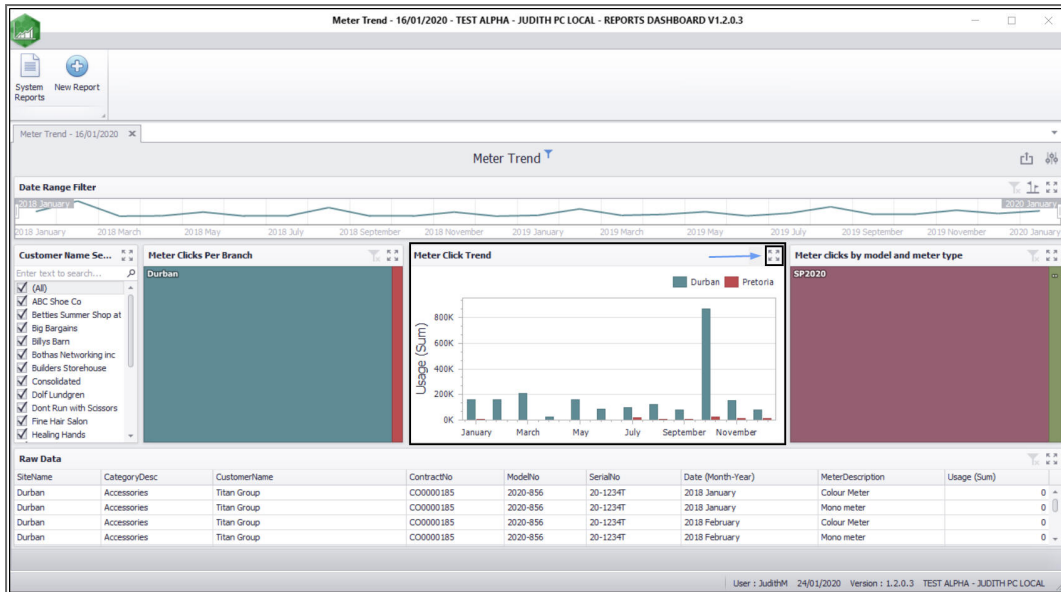2. Data pertinent to the selected item will be displayed.

SIZING DASHBOARD ITEMS

- You can resize dashboard items by hovering over the edge of the dashboard item you wish to resize.
- A **Separator** 'black plus sign' will appear.
- Move the separator up or down to widen or sideways to lengthen the selected dashboard item.
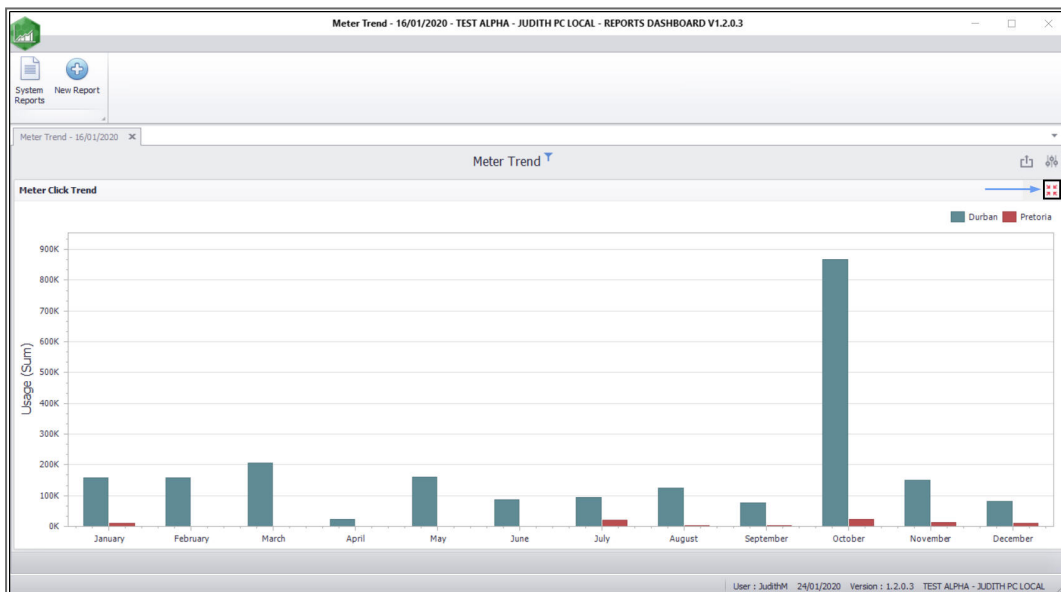

MAXIMIZING / MINIMIZING DASHBOARD ITEMS

- To maximize a dashboard item, click on the **Maximize / Minimize** icon on a selected dashboard item.
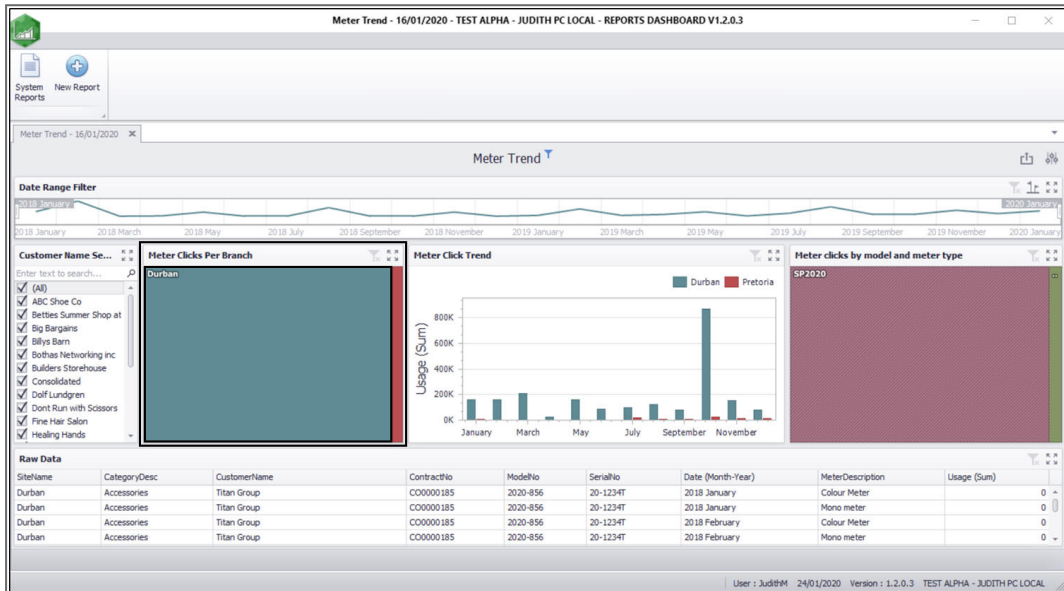- The icon will be **grey** in colour.

- The selected dashboard item will be maximized.
- The colour of the **Maximize / Minimize** icon will change to red.
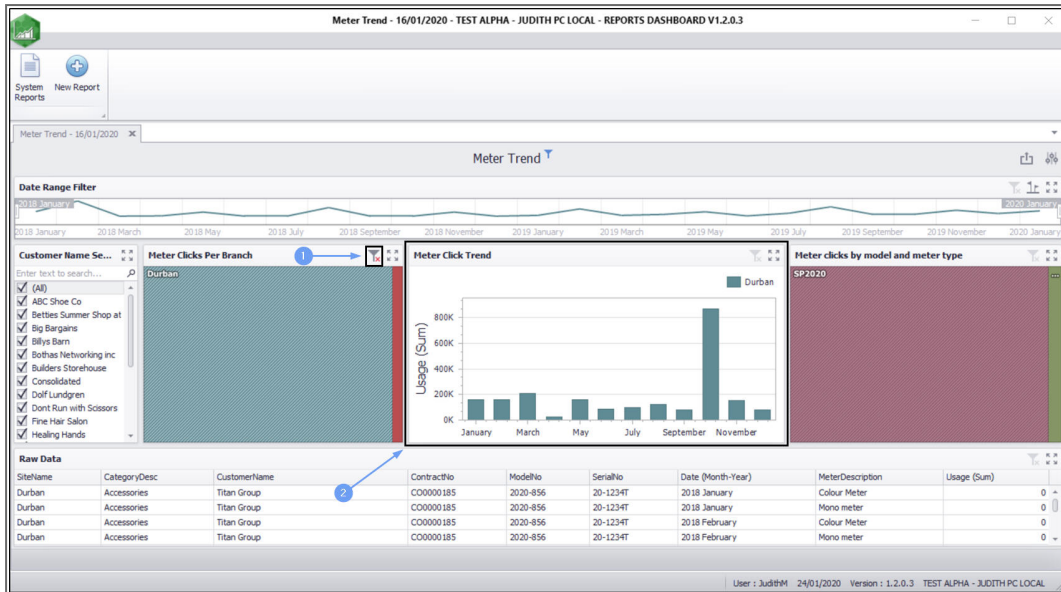 - **Note**: To restore / minimize the dashboard item, click on the **Maximize / Minimize** icon again.

FILTERING DATA

- On a selected dashboard item, click on / select a parameter you wish to use as a filter.
    - In this example, **Durban** has been selected from the **Meter Clicks Per Branch** dashboard item.
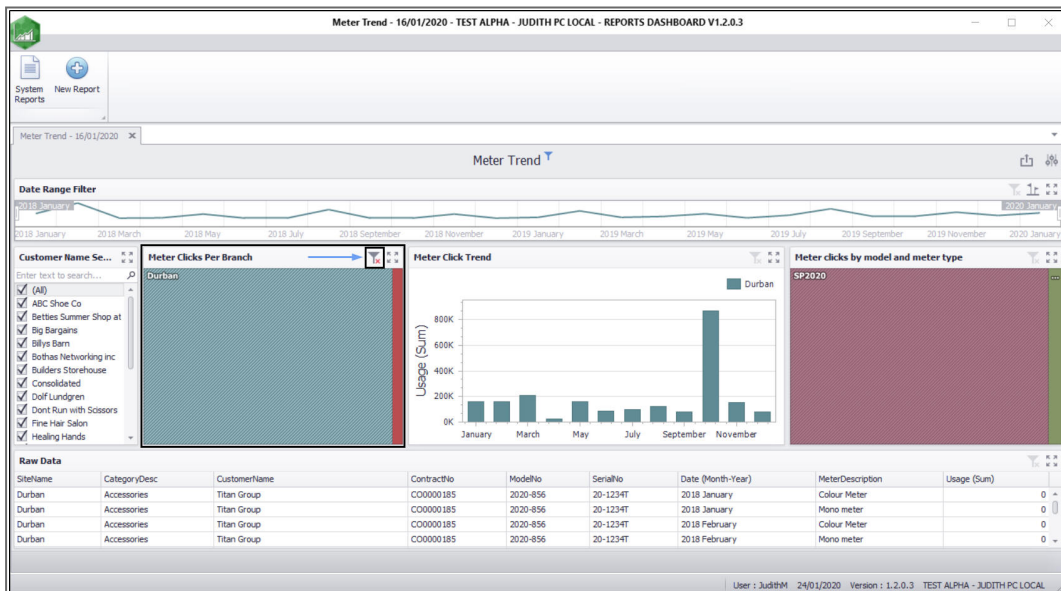

1. The **Filter** icon on the selected dashboard item (in this case **Meter Clicks Per Branch**) will become **grey** in colour with a **red** [X].
2. The data on all dashboard items with **filtering** enabled will display the results of the filter.
    - In this image, the **Meter Click Trend** dashboard item now only displays data for **Durban**.
        - **Note**: The selected 'graphical' parameter and filtered 'graphical' results will look 'shaded'.
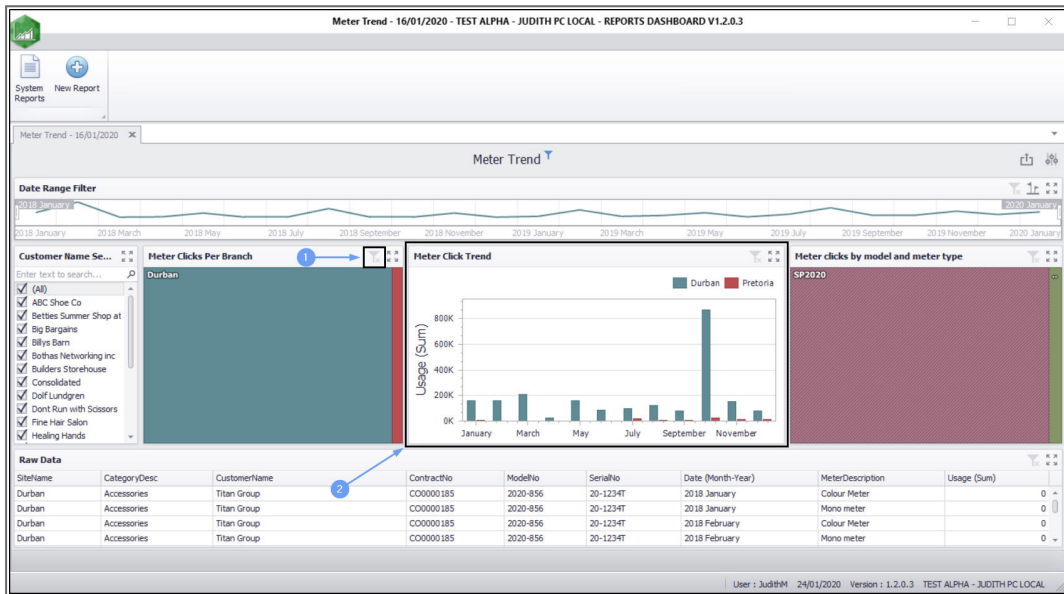
CLEAR FILTER

- To clear an applied filter, click on the 'active' **Filter** icon (**grey** filter with a **red** ' **X** ').
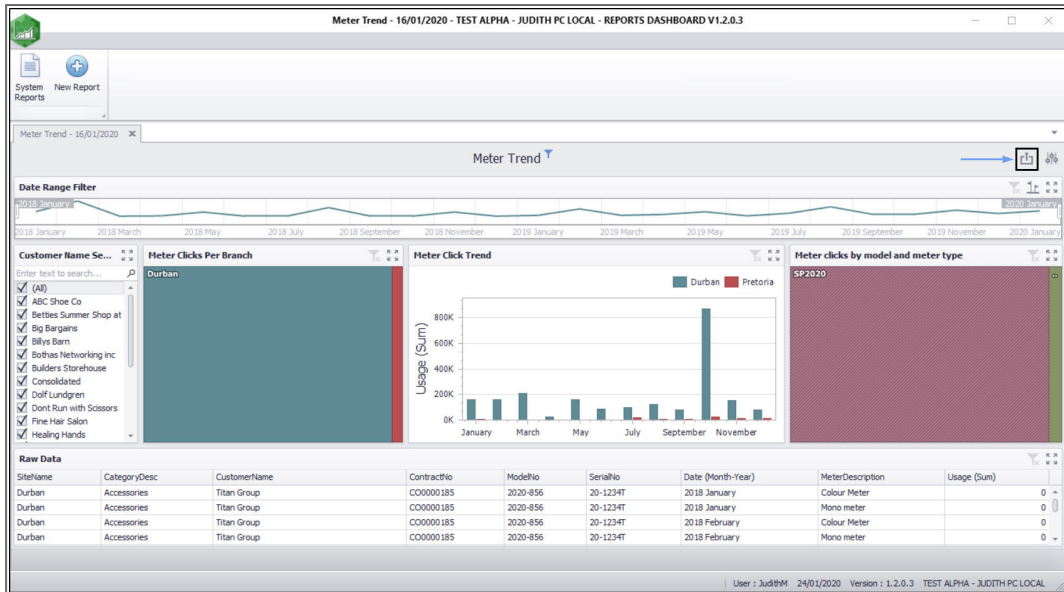- In this image, the **Filter** is applied on the **Meter Clicks Per Branch** dashboard item.

1. The applied filter will be removed. The **Filter** icon will now be greyed out.

    • In this image, the **Meter Clicks Per Branch** filter icon is now greyed out.

2. The data on all dashboard items with filtering enabled will now go back to its form before the filter was applied.

    • In this image, **Meter Click Trend** dashboard item now displays data for all branches.
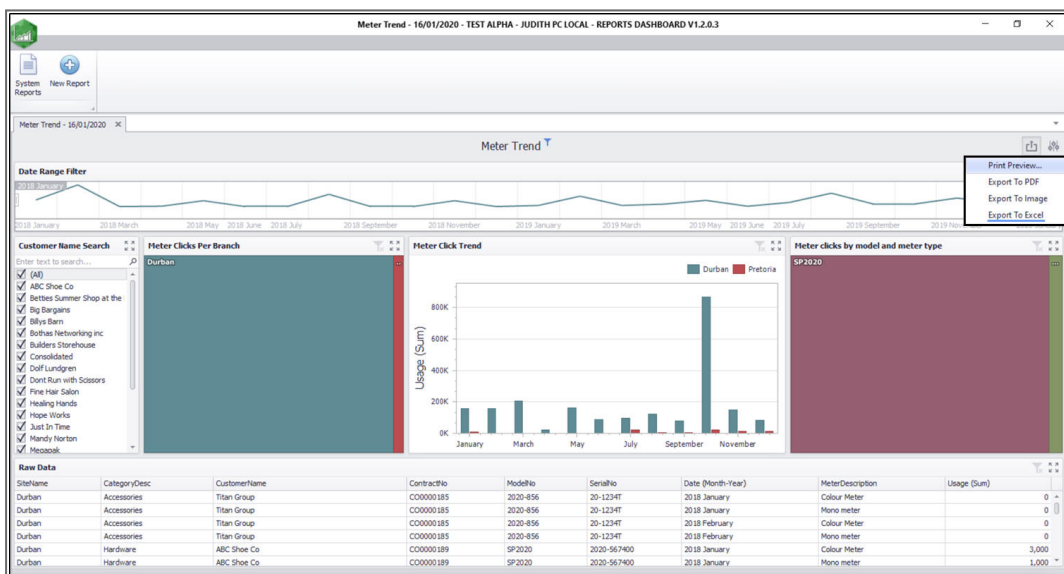

EXPORT TO....

• You can print preview or export a dashboard report to PDF, Excel or Image.

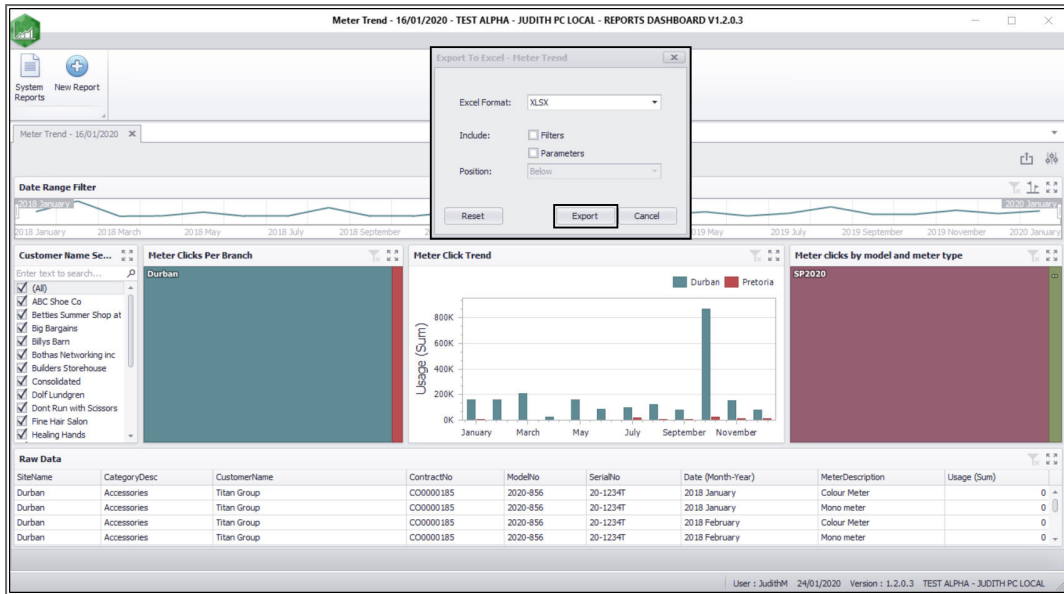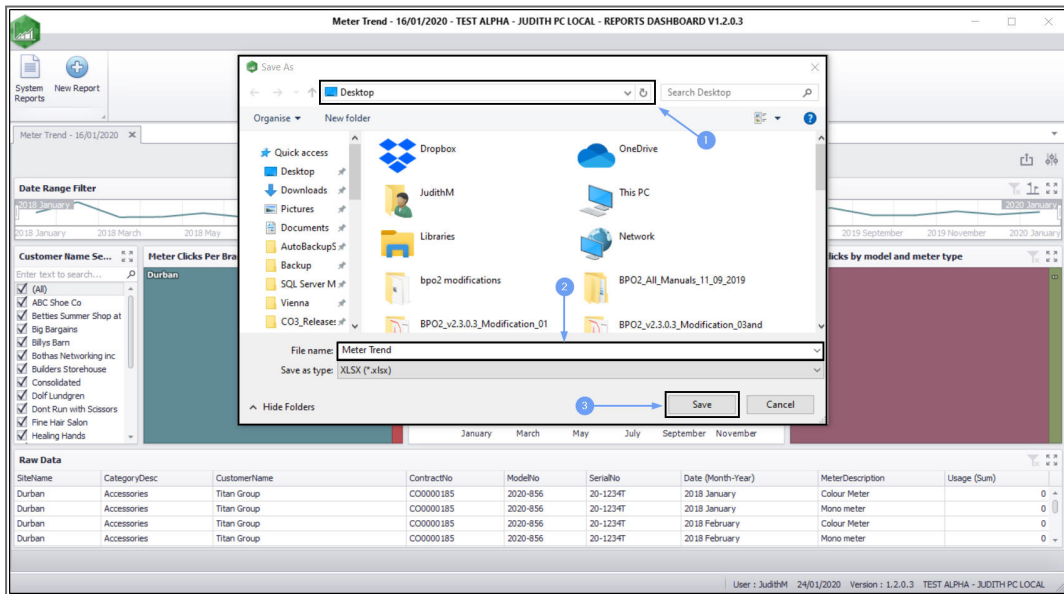• To export a dashboard report, click on the **Export** icon.

- A **menu** will be displayed.
- Select the required option.
  - In this image, **Export to Excel** has been selected.
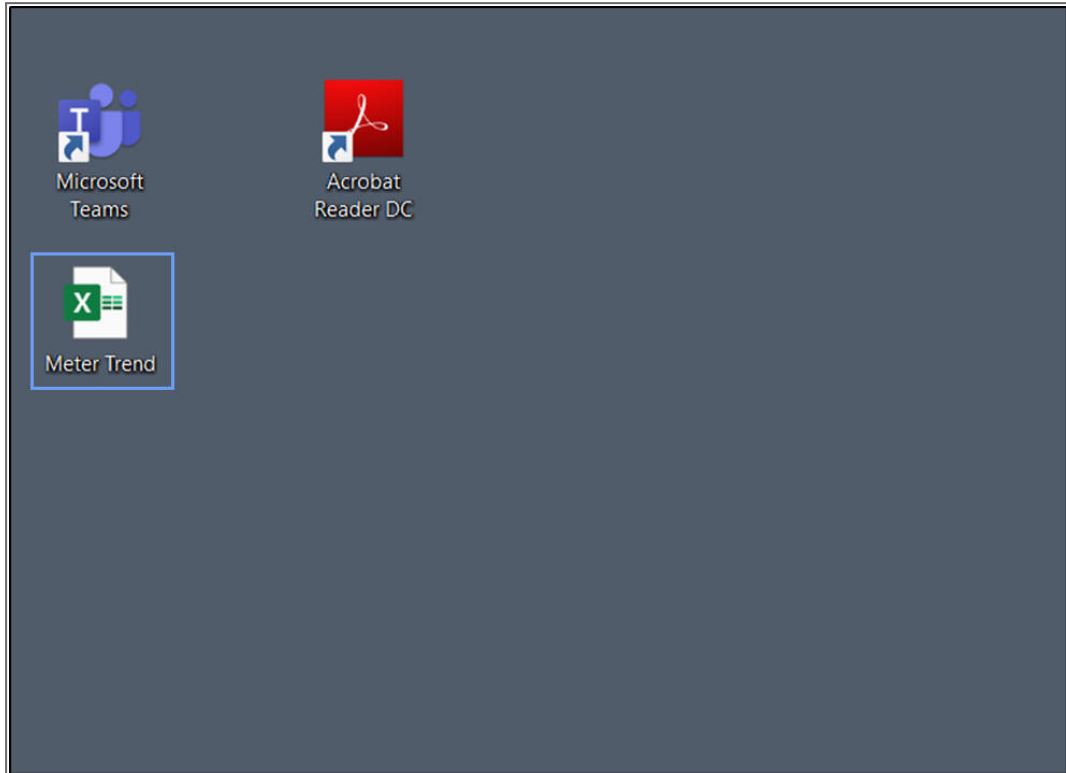

- An **Export To.....** screen will pop up.
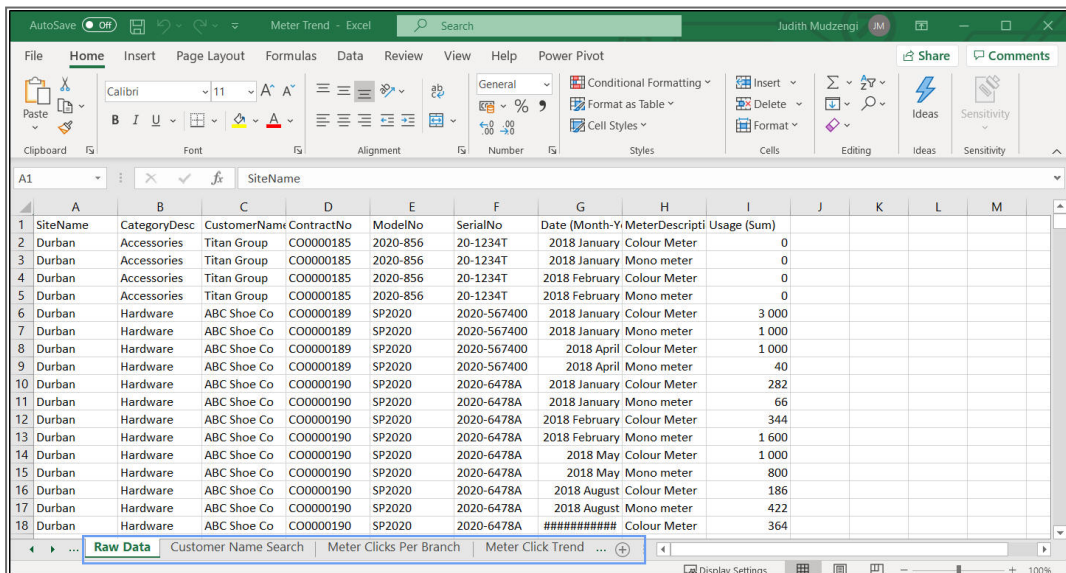- Click on **Export**.

- A **Save As** screen will be displayed.
    1. A default save location will be displayed but you can change this if required. Click on the **down arrow** and select an alternative location, if you wish to change the location.
    2. A default **File Name** will be displayed. If you wish to rename this, delete and type in the new name.
    3. When you are done, click on **Save**.

- The file will be displayed in the save location.
- Double click on the saved file.

- The file will open, displaying the dashboard report data.
  - In this image, the data is in different **tabs**.

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