

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

REPORTS DASHBOARD

EDIT A REPORT

The **Reports Dashboard** application graphically displays critical business information onto a dashboard which can be viewed in real-time.

In this **Reports Dashboard**, you can also edit an existing report.

Access: Reports Dashboard Icon > Log In

The Reports Dashboard application will open.

• Click on System Reports.

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User : Judith 24	01/2020 Version : 1.2.0.3 TEST ALPHA - JU	JDITH PC LO	CAL

- 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.

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- 1. All the underlying 'active' reports in the selected category will be displayed.
- 2. Click on **Edit** on the report you wish to edit.

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- The selected report will be displayed.
- Data pertinent to the selected report will be displayed.

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DASHBOARD RIBBON OPTIONS

 Note: The options explained in this manual are not exhaustive. Refer to the Related Topics section at the foot of the page for more options.

CHANGE DASHBOARD TITLE

• Click on Title.



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- The **Dashboard Title** screen will be displayed.
 - 1. Select an option you wish to be visible on the dashboard title.
 - 2. Edit the Title text if required and select how the title will be aligned on the dashboard.
 - 3. Load an image if you would like an image to be displayed as part of the dashboard title.
 - 4. Click on OK.

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Edit a Dashboard Report

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SET DEFAULT CURRENCY

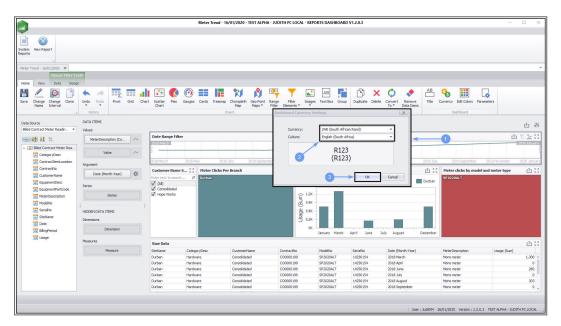
• Click on Currency.

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- 1. The **Dashboard Currency Settings** screen will be displayed.
- 2.
- **Currency:** Click on the drop-down arrow and select the applicable currency.
- **Culture:** Click on the drop-down menu and select the applicable culture.
- 3. Click on OK.



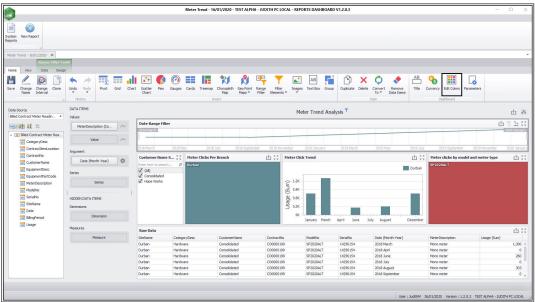


• The **Dashboard Currency Settings** screen will be closed.

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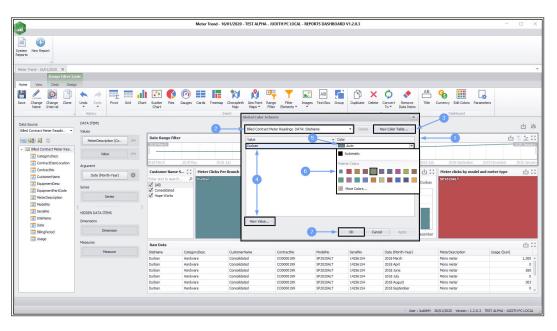
EDIT DASHBOARD COLOURS

• Click on Edit Colours.





- 1. The **Global Colour Scheme** screen will be displayed.
- 2. Select an existing data item or
- 3. select a new data item.
- 4. For an existing data item, select an existing value or create a new value. For a new data item, create a new value.
- 5. Click on the current colour scheme of the selected value and
- select a new colour from the range of colours displayed in the Colour Palette.
- 7. Click on OK.



• The colour of the selected value will change.



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CHANGE REPORT NAME

• Click on Change Name.

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- 1. The Change Display Name screen will be displayed.
- 2. Delete and type in the new report name.
- 3. Click on Save.



Edit a Dashboard Report

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• The new report name will now be displayed.

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CHANGE REPORT INTERVAL

• Click on Change Interval.



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- 1. The Change the Report Run Interval screen will be displayed.
- 2. Edit the interval.
- 3. Click on OK.

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• The Change the Report Run Interval screen will be closed.



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CLONE REPORT

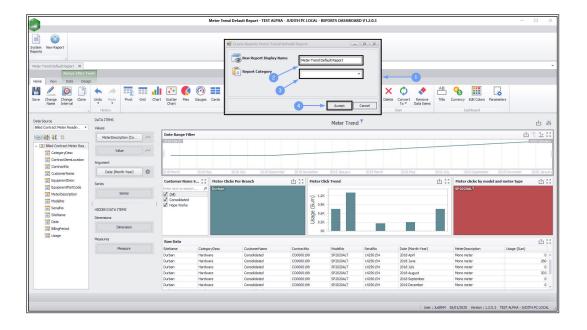
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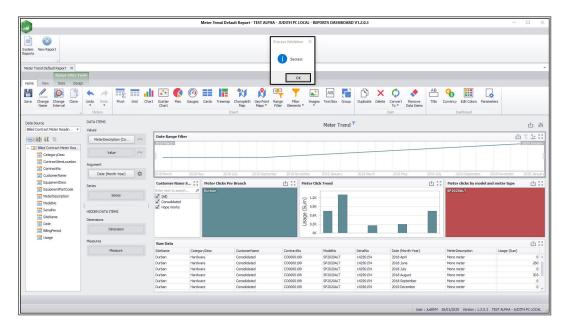
- 1. The Clone Report screen: [] will be displayed.
- 2. New Report Display Name: The original report name will be displayed by default. Delete and type in a new report name.



- 3. **Report Category:** Click on the down arrow and select the required category.
- 4. Click on Accept.



- A Process Validation screen will pop up telling you;
 - Success.
- Click on OK.



Help v2024.5.0.7/1.0 - Pg 13 - Printed: 04/07/2024



- The new report will be displayed.
- You can make any of the following changes if required:
 - Add a new dashboard item
 - Show or hide dashboard item title
 - Duplicate a dashboard item
 - Delete a dashboard item
 - Convert a control type
 - Remove data items from a dashboard item
 - Rename dashboard item title and or columns
 - Edit a dashboard item filter
 - Clear a dashboard filter
 - Print preview a dashboard item
 - Export To.....
 - Change dashboard report title
 - Set default currency
 - Edit dashboard colours
 - Change report name
 - Change report interval
 - Set up report filters
 - Change report design



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• When you are done, click on **Save**.

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• Click on Yes.

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- A Process Validation message will pop up telling you;
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- The report screen will be closed.
- You can now view the report if you wish.

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Related Topics



- Add a new dashboard item
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- Duplicate a dashboard item
- Delete a dashboard item
- Convert a control type
- Remove data items from a dashboard item
- Rename dashboard item title and or columns
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- Clear a dashboard filter
- Print preview a dashboard item
- Export To.....
- Configuration of report filters
- Change report design

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