

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.

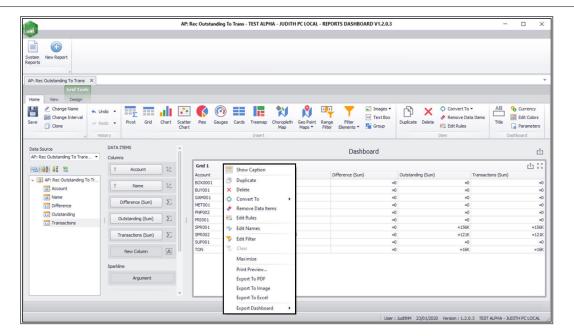
Access: Reports Dashboard Icon > Log In

The **Reports Dashboard** application will open.

#### DASHBOARD MENU OPTIONS

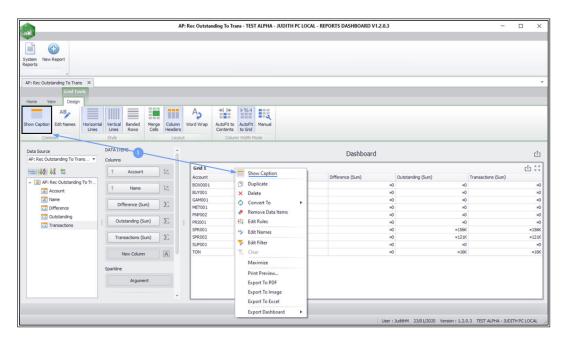
- When adding or editing a dashboard, if you right click on a dashboard item column header or title, a menu with additional options will be displayed.
  - Note: Some of the options displayed in the right click menu are pertinent to the selected control type (dashboard item) and won't be available if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





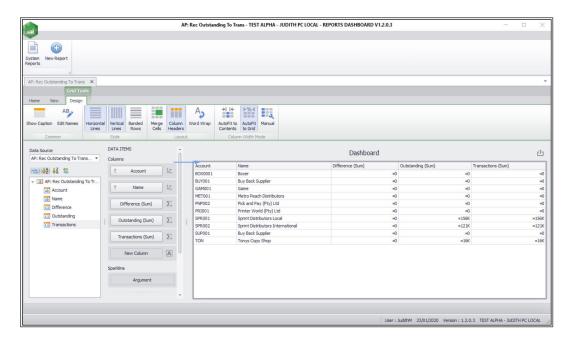
## SHOW OR HIDE DASHBOARD ITEM TITLE

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





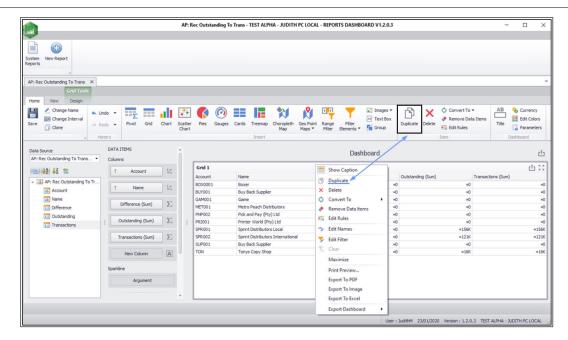
- 1. The **Show Caption** button on the **Ribbon** will become disabled ('whitish' in colour).
- 2. The **title** of the selected control type (dashboard item) will no longer be displayed.
  - Note: To display the title of the selected control type (dashboard item) again, repeat the previous step. The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



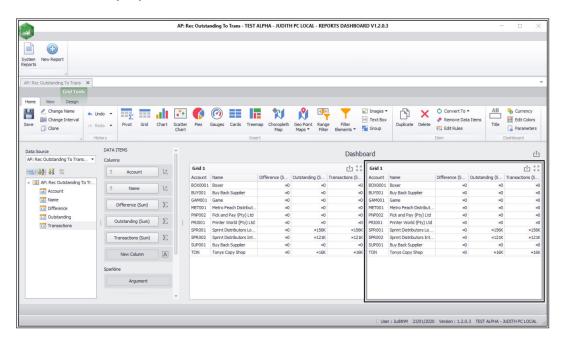
## **DUPLICATE A DASHBOARD ITEM**

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





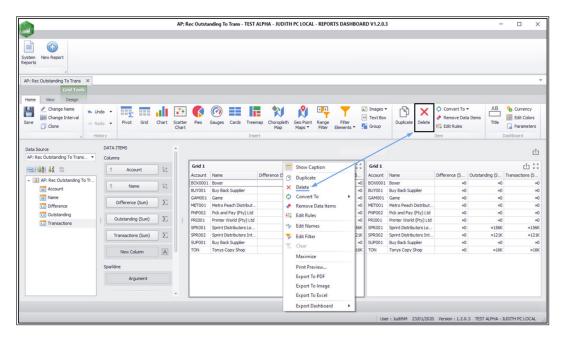
 A duplicate of the selected control type (dashboard item) will be displayed.



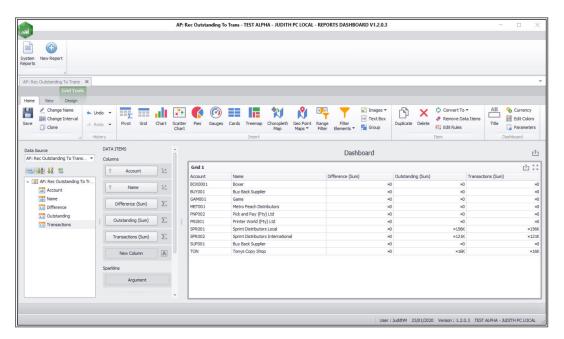


#### **DELETE A DASHBOARD ITEM**

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



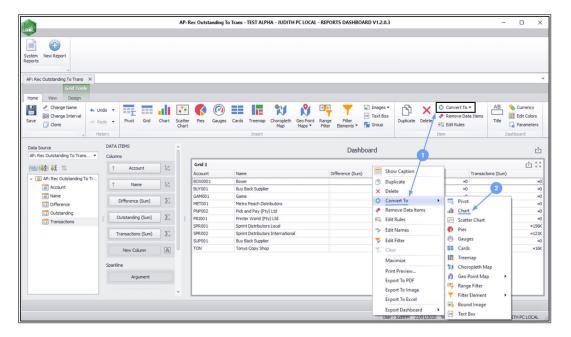
• The selected control type (dashboard item) will be deleted.





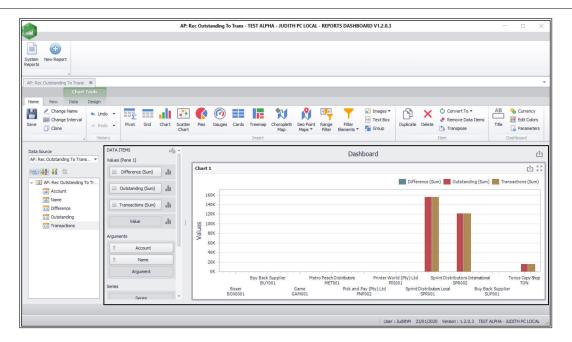
#### **CONVERT A CONTROL TYPE**

- 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.



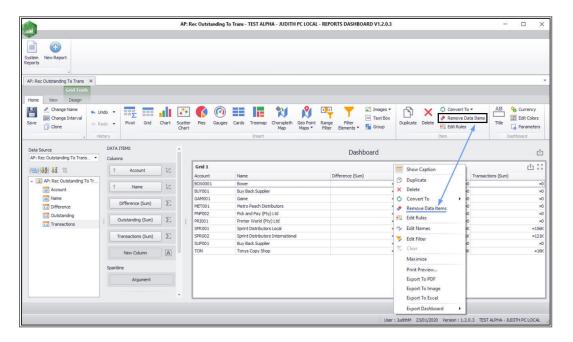
- The control type (dashboard item) will be converted to the selected control type.
  - In this image, a **Chart** is now displayed.





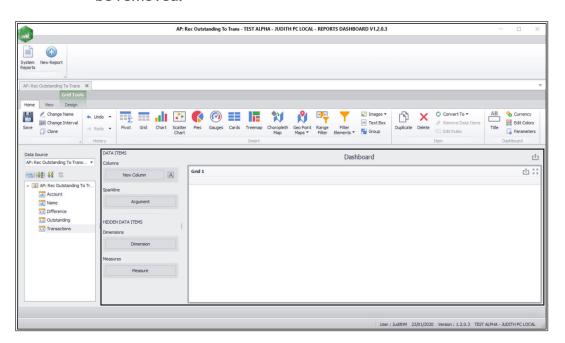
#### REMOVE DATA ITEMS FROM A DASHBOARD ITEM

 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.





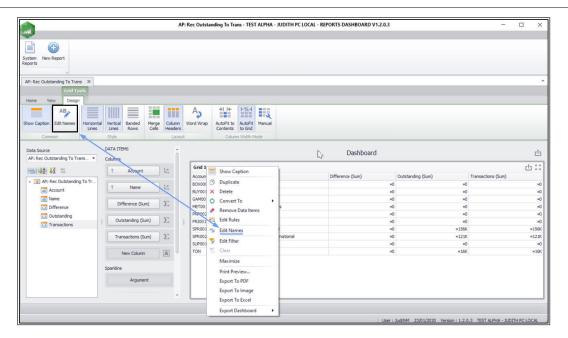
 The data items of the selected control type (dashboard item) will be removed.



# 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.



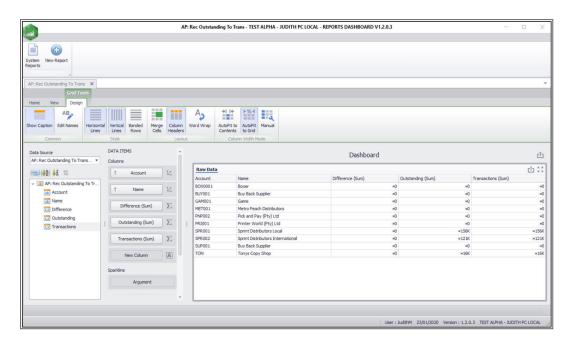


- The Edit Names screen will be displayed.
- Make the required changes.
- · Click on Ok.





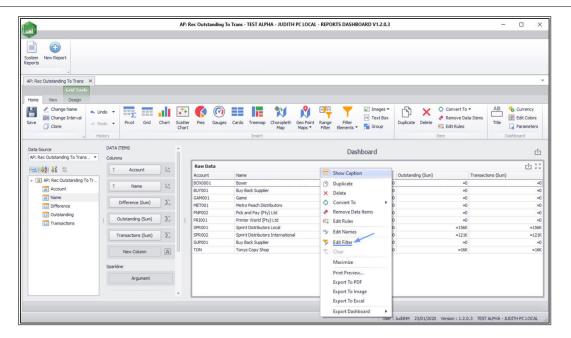
- The changes will be saved.
  - In this image, the title of the selected control type (dashboard item title) has been changed from Grid 1 to Raw Data.



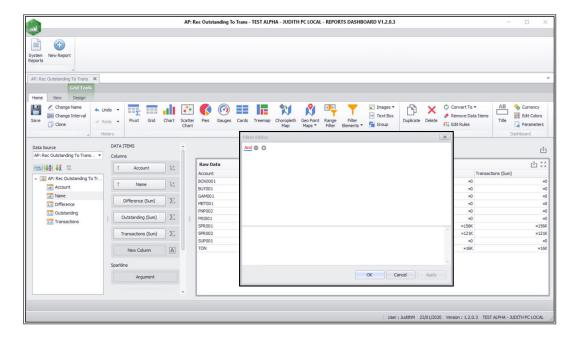
## **EDIT DASHBOARD ITEM FILTER**

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



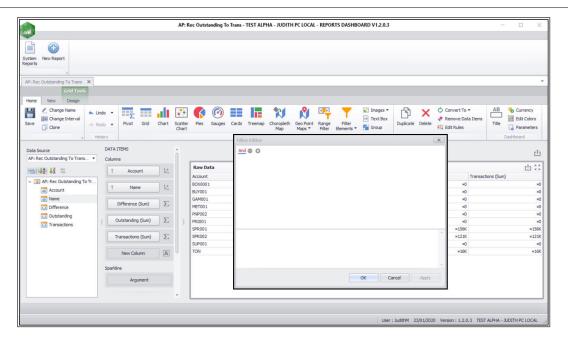


- The **Filter Editor** screen will be displayed.
- Click on the red 'And' text in the Filter Editor.

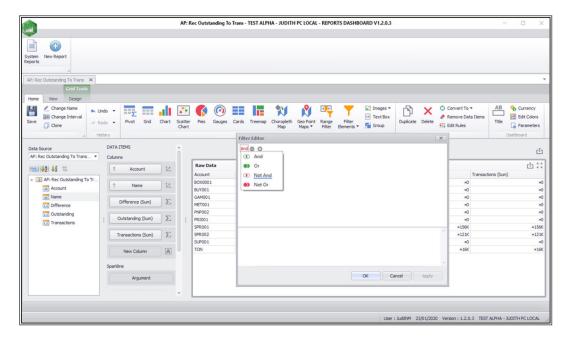


• This will bring up a **drop-down menu** with options to change the current filter selections.



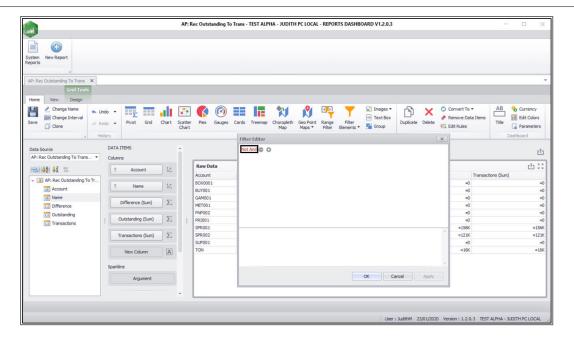


- Click on any one to make changes to the filter selection.
- In this image, Not And has been selected.

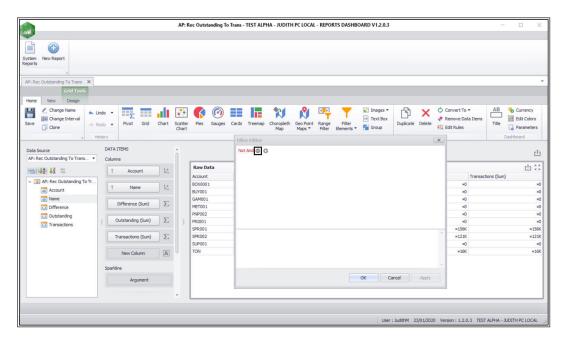


• Not Add instead of 'And' is now displayed in the Filter Editor.



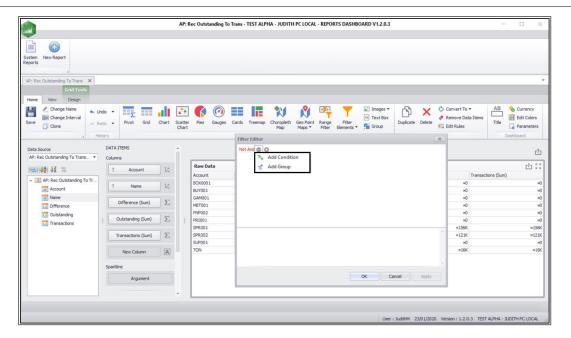


• In the Filter Editor, click on the Action button.

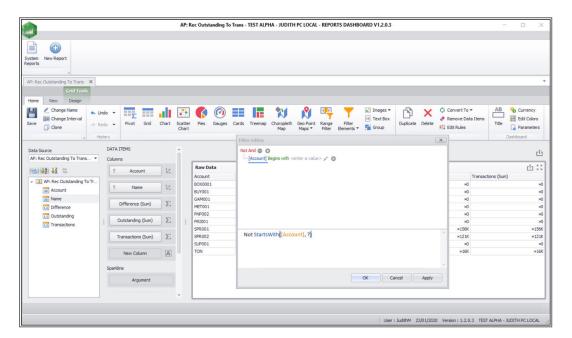


- A list of actions will be displayed.
- Select the required action.





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

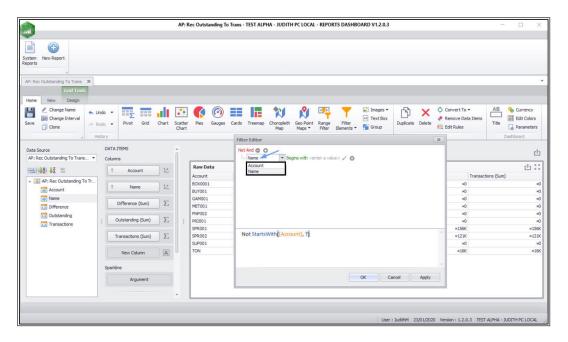


- A list of titles will be displayed.
- Click on any of these titles to change the column that is being

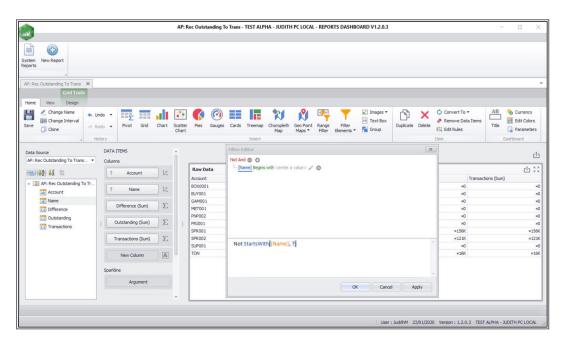


filtered.

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

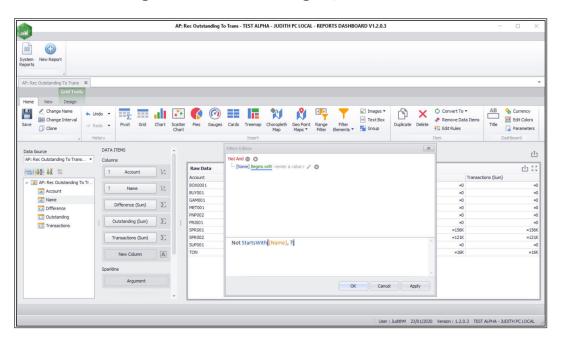


• In this image, the **Filter Editor** will now displays **Name** as its column filter instead of **Account**.

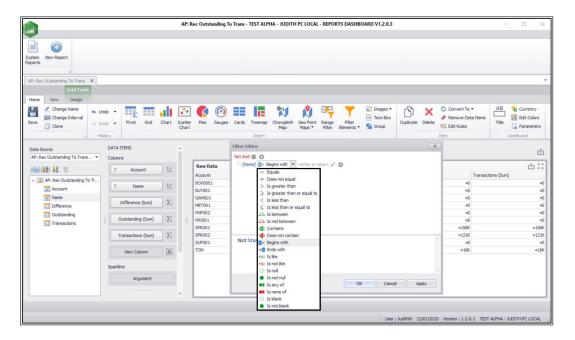




• Click on any one of the **green text**. (These are all the **methods** of filtering available in this data grid.)

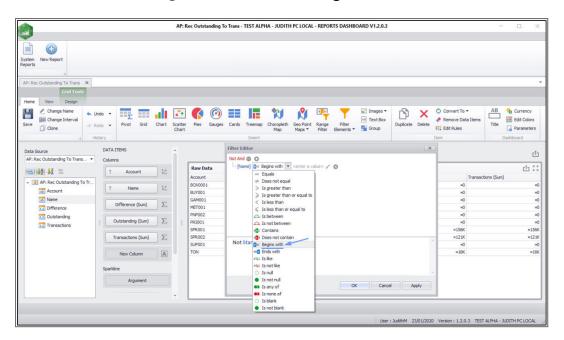


 A pop up menu will display a list of the filter method options for the selected column.

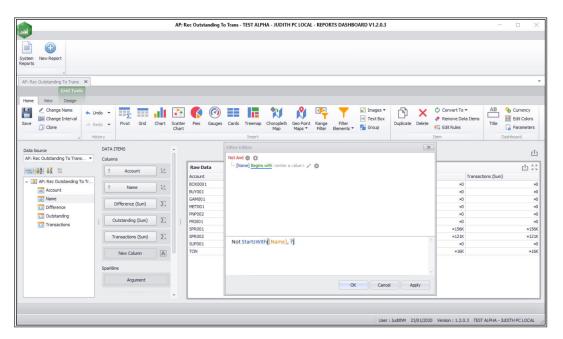




- Click on any one of these to select the **filter method** required.
- In this image the filter method **Begins with** has been selected.



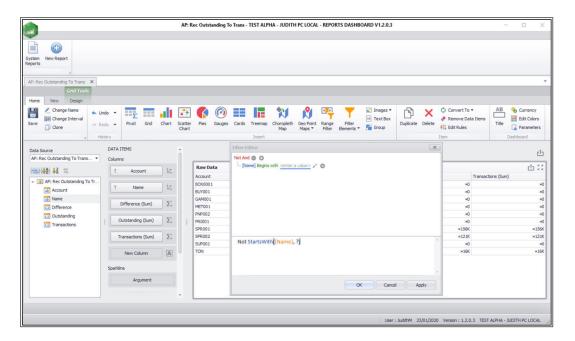
• The Filter Editor will now display this filter method choice.



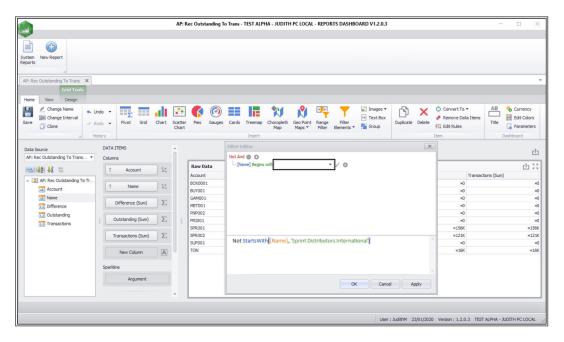
 Your filter search parameters needs to be appropriate to the newly selected column and method.



• Click on the enter a value text.

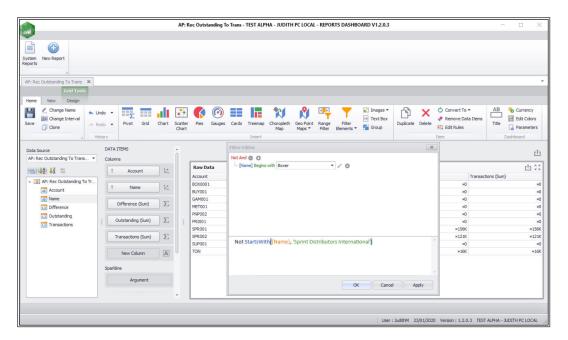


- A text box will appear.
- Type in or click on the down arrow and select an appropriate parameter that applies to this particular column ( Name ) and filter method ( Begins With ).



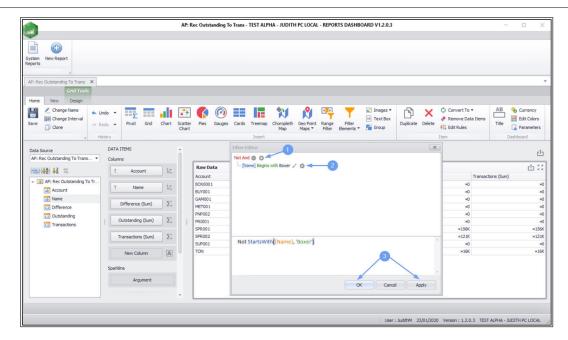


- The text box in the **Filter Editor** is not case sensitive, you can type in any part of a word or number.
- In this image, **Boxer** has been selected.

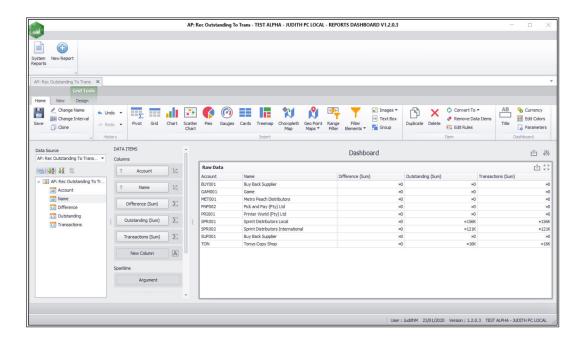


- 1. You can add more filters.
- 2. You can delete a filter.
- 3. When you have finished making your filter changes and selections, click on **Apply** and **Ok** to apply these to the dashboard item.



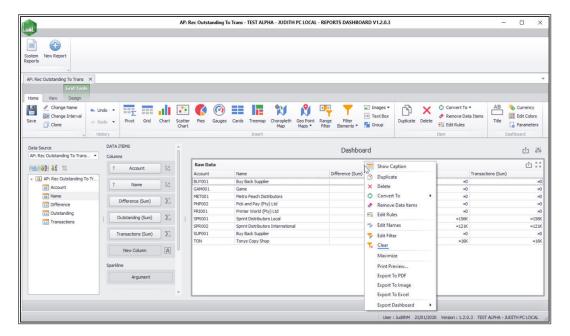


- The selected filter will be applied to the dashboard item.
- In this image, **Boxer** is no longer displayed in the dashboard item.



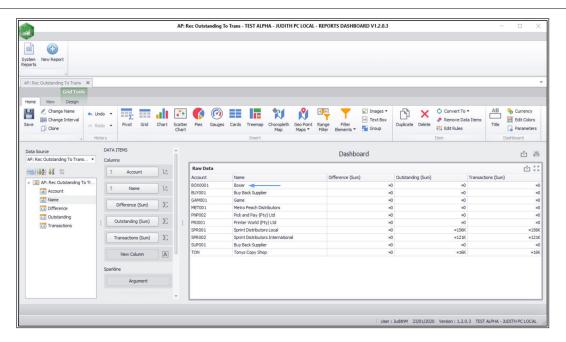
#### **CLEAR A DASHBOARD FILTER**

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



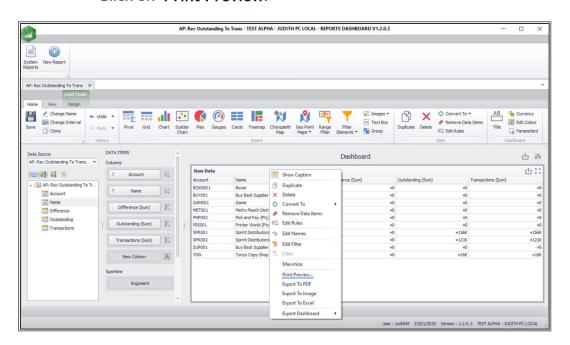
- The column filter will be cleared.
- In this image, **Boxer** is now displayed in the selected dashboard item.





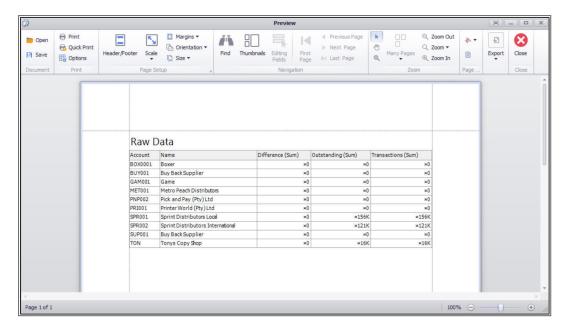
#### **PRINT PREVIEW A DASHBOARD ITEM**

• Click on Print Preview.





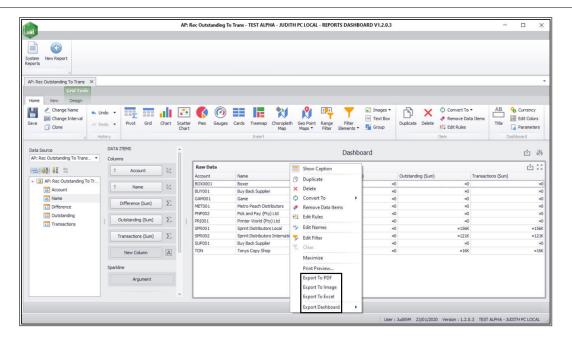
- The **Preview** screen will be displayed.
- You can now view the data contained in the dashboard item before printing.



## **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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