# 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.
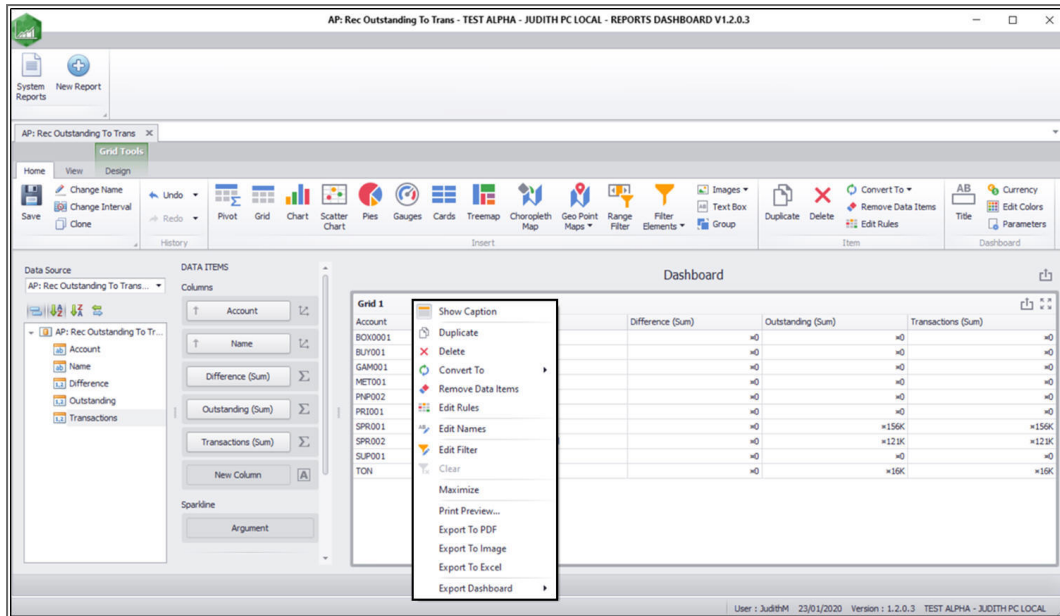
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*Access:* Reports Dashboard Icon > *Log In*

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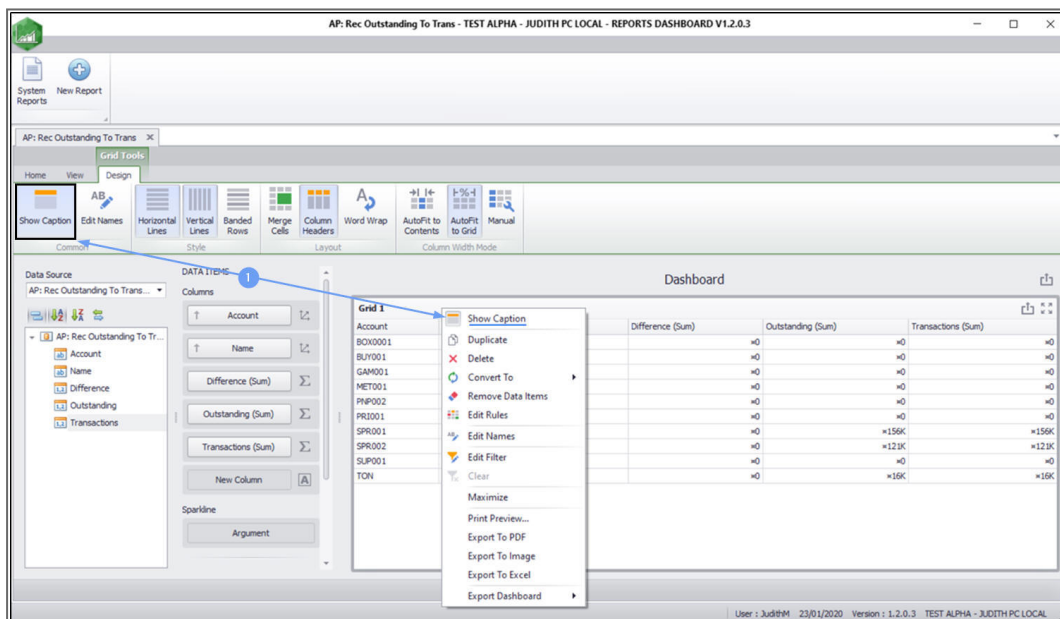The *Reports Dashboard* application will open.

## DASHBOARD MENU OPTIONS

- 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.
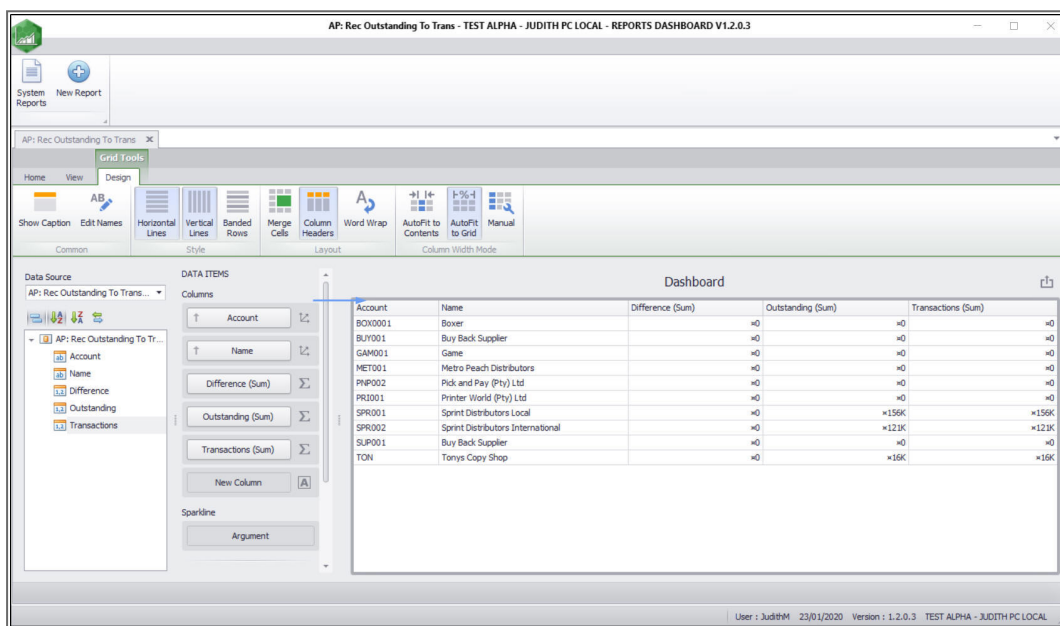
# SHOW OR HIDE DASHBOARD ITEM TITLE

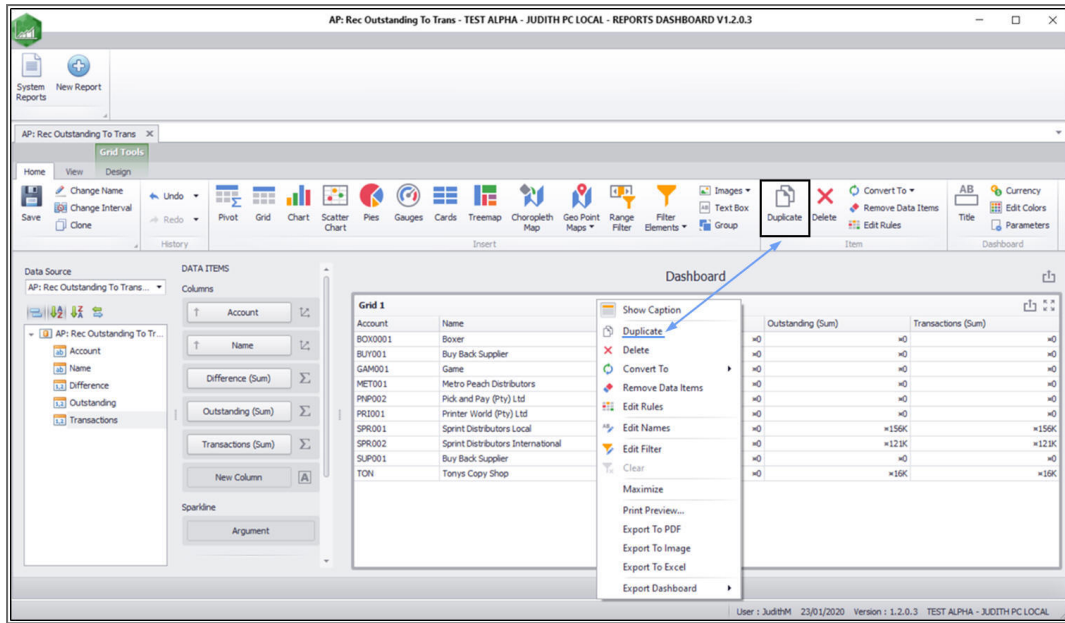1. Click on *Show Captions* on either the *Design Tab* or the *right click menu*.

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.
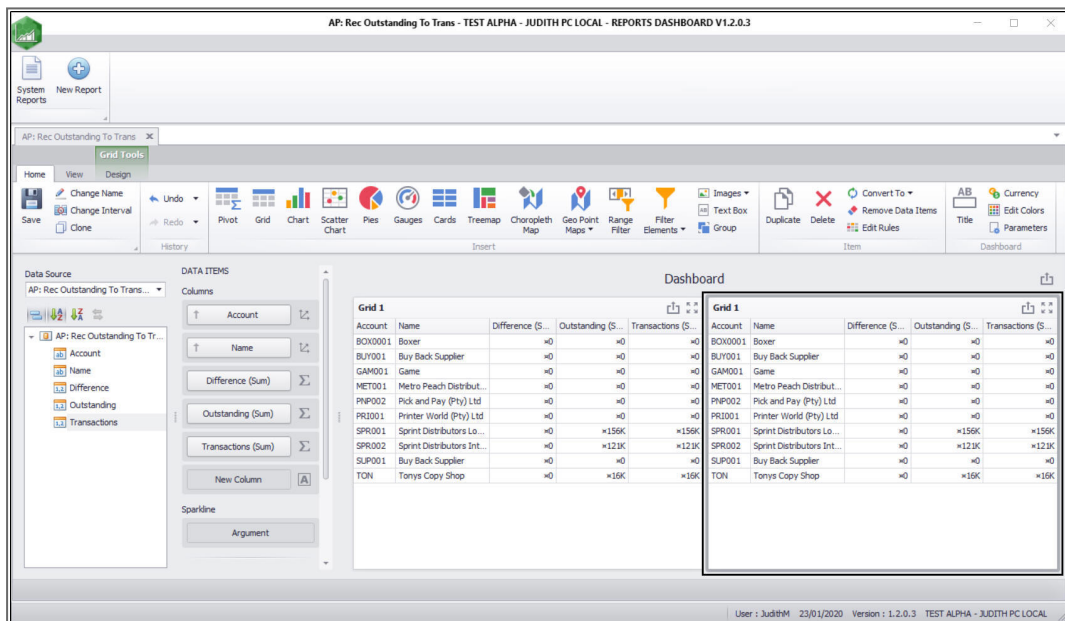


## DUPLICATE A DASHBOARD ITEM

- To duplicate a selected control type (dashboard item), click on *Duplicate* on either the *Home* tab or the *right click menu*.
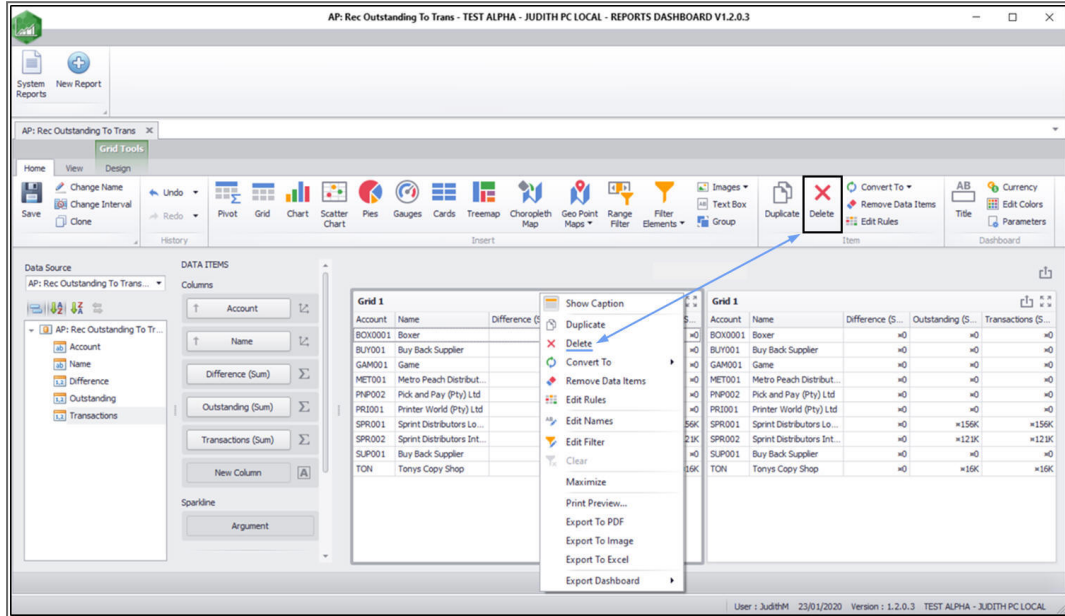
- A duplicate of the selected control type (dashboard item) will be displayed.
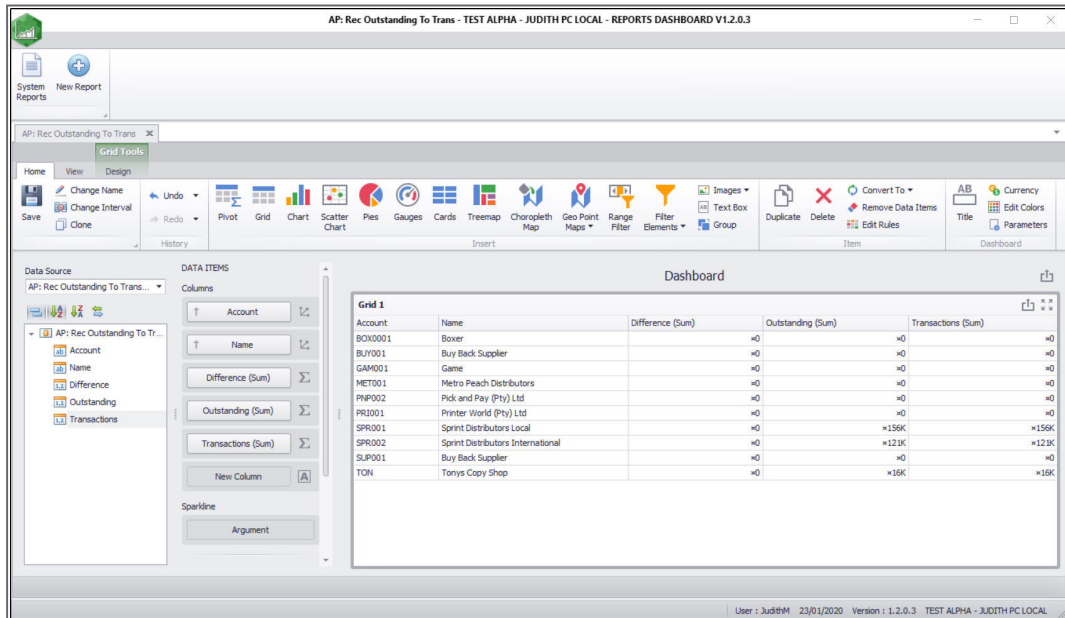
# DELETE A DASHBOARD ITEM

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

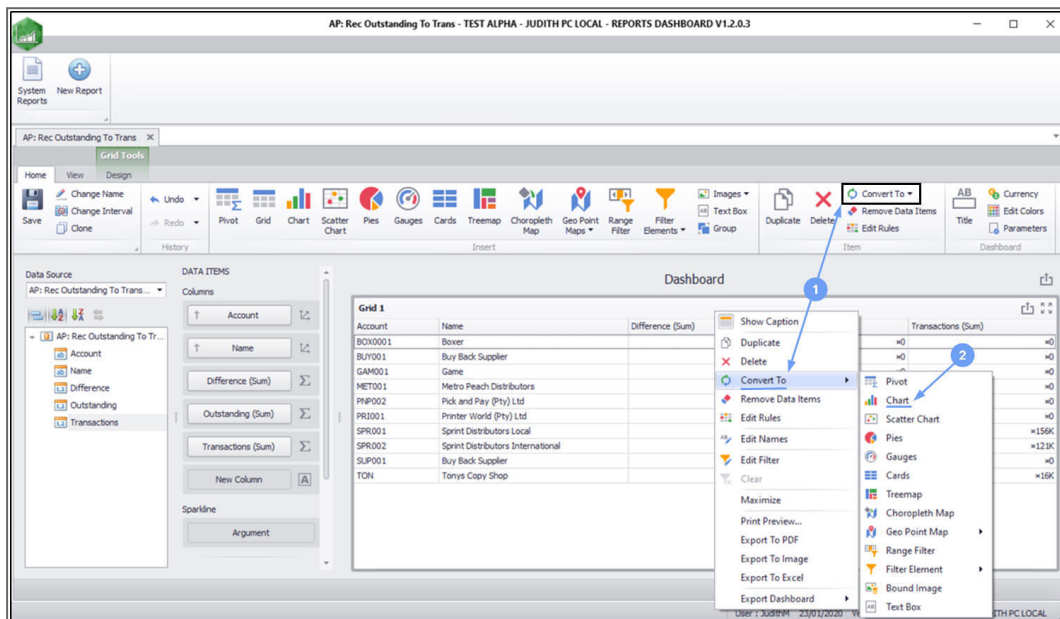

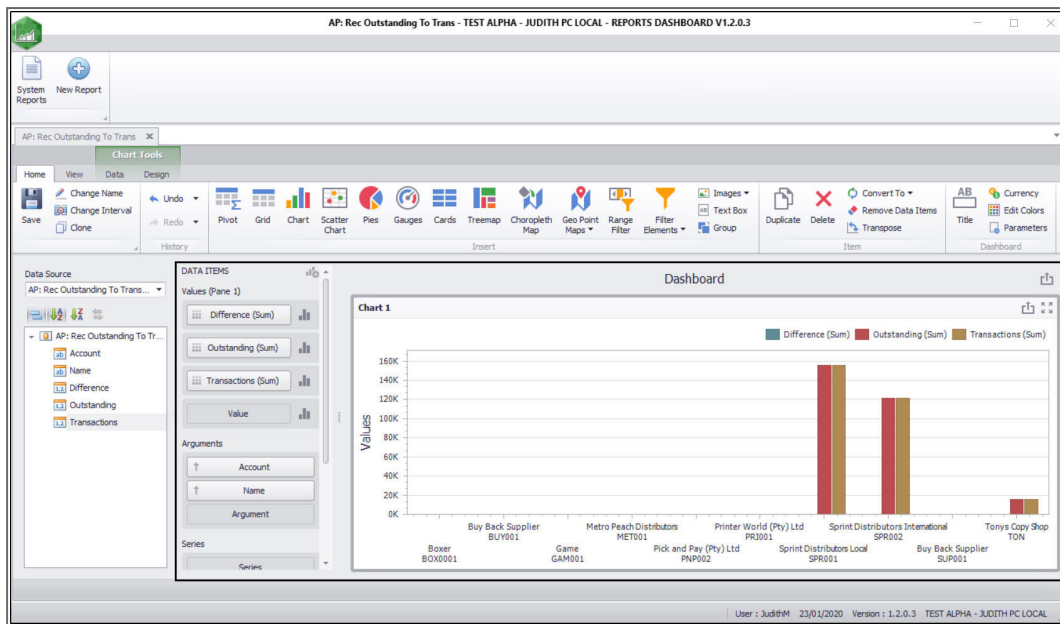- The selected control type (dashboard item) will be deleted.

# CONVERT A CONTROL TYPE

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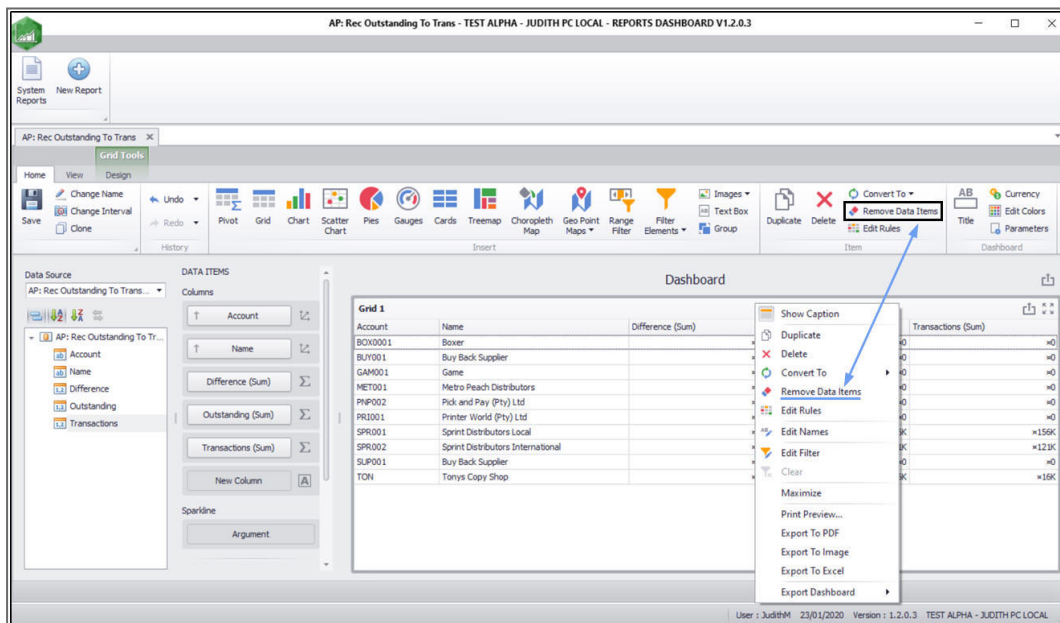   - In this image,  *Chart*  has been selected.



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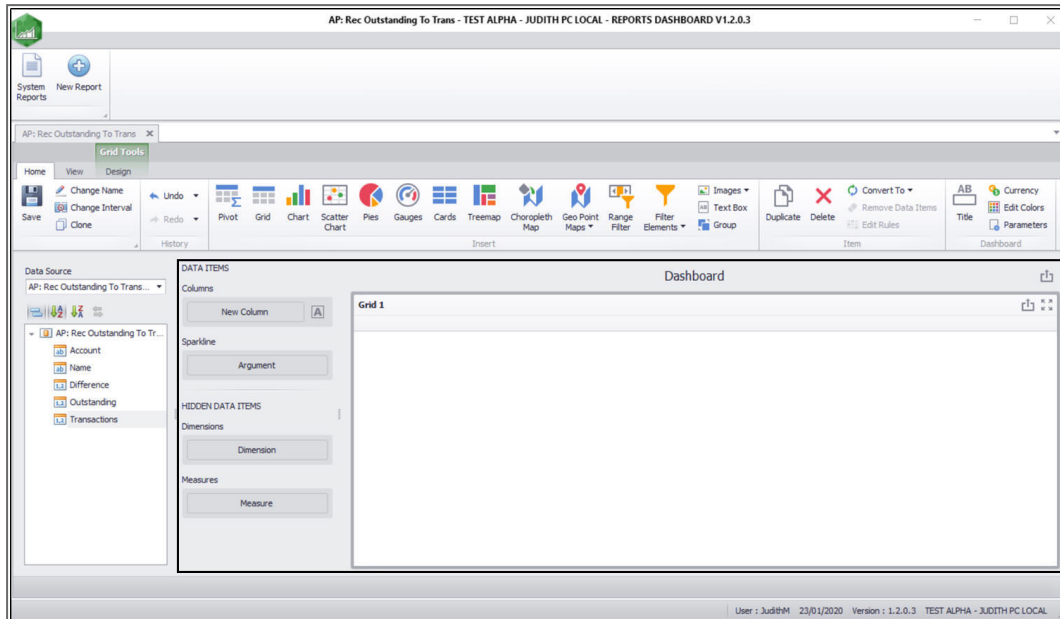   - In this image, a  *Chart*  is now displayed.

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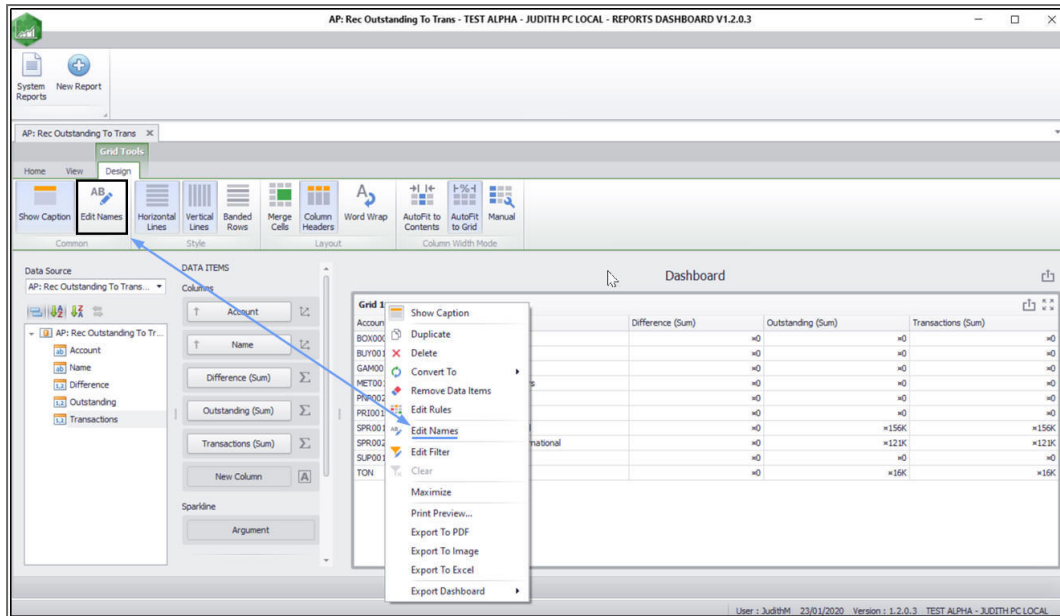
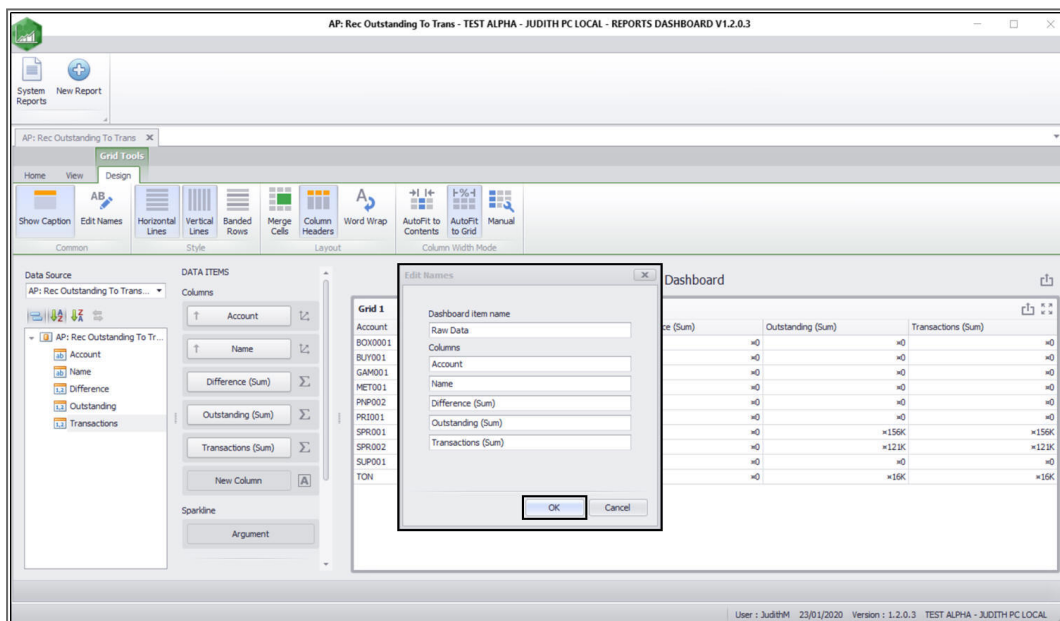- The data items of the selected control type (dashboard item) will be removed.



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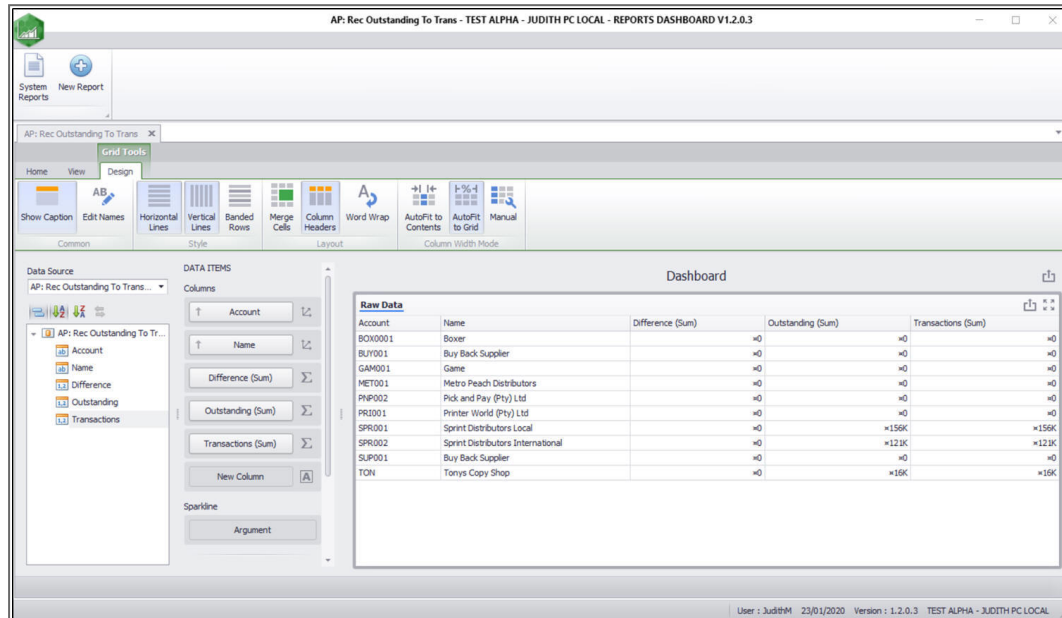
- The *Edit Names* screen will be displayed.
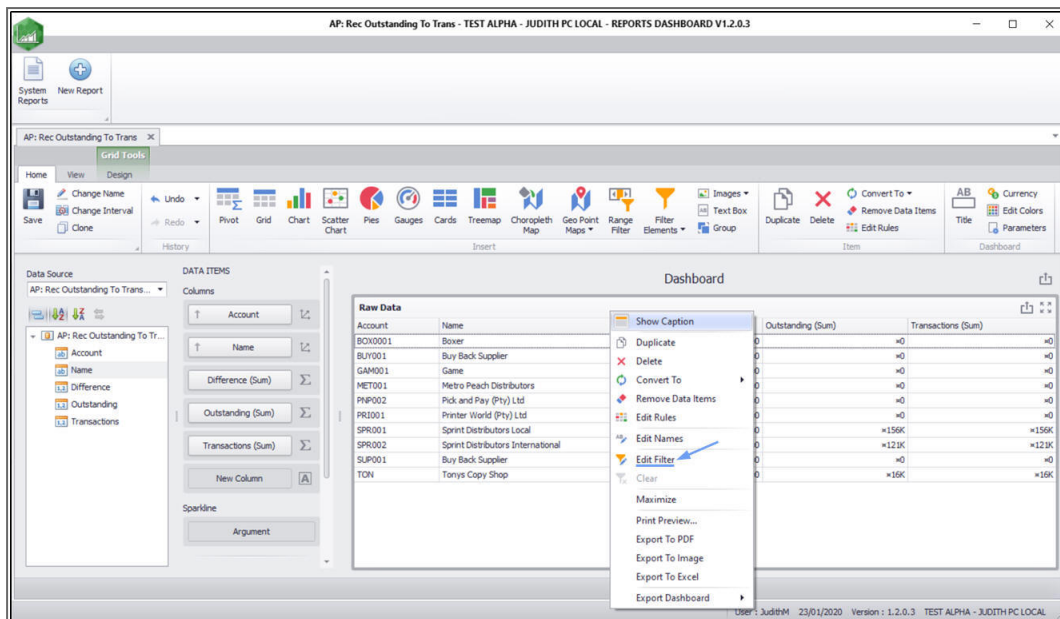- Make the required changes.
- Click on *Ok*.

- 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*.
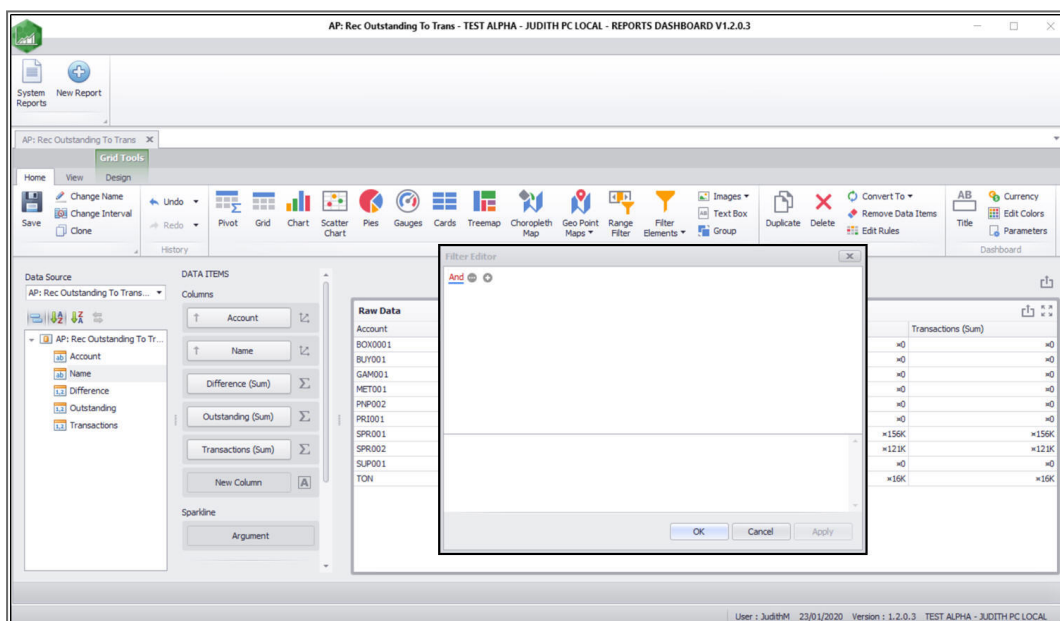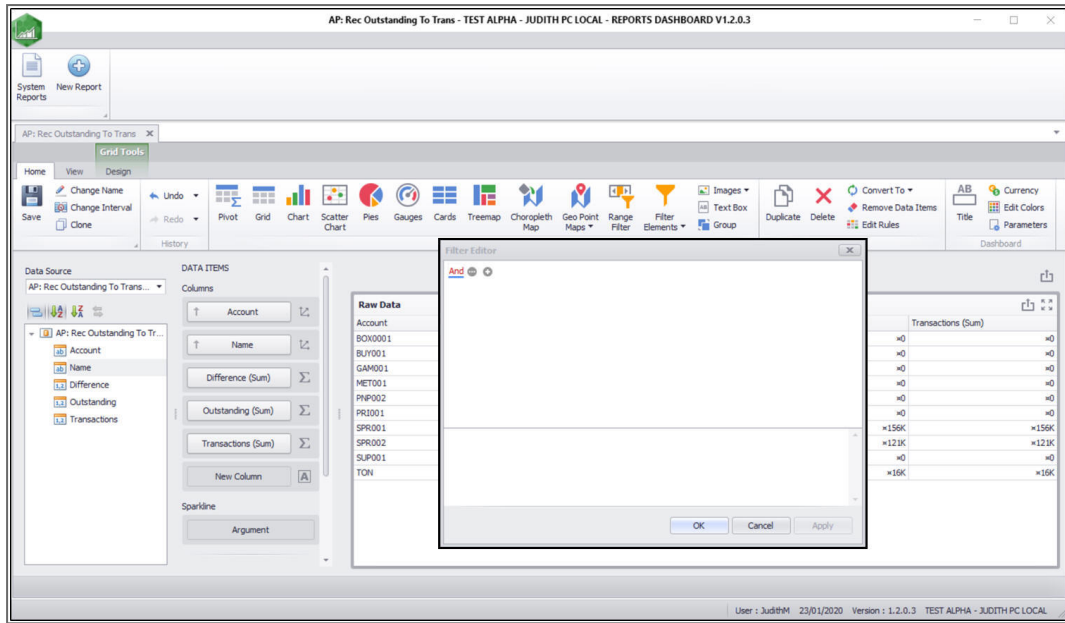


# EDIT DASHBOARD ITEM FILTER

- To add / edit column filters of a selected control type (dashboard item), click on *Edit Filter* on the *right click menu*.
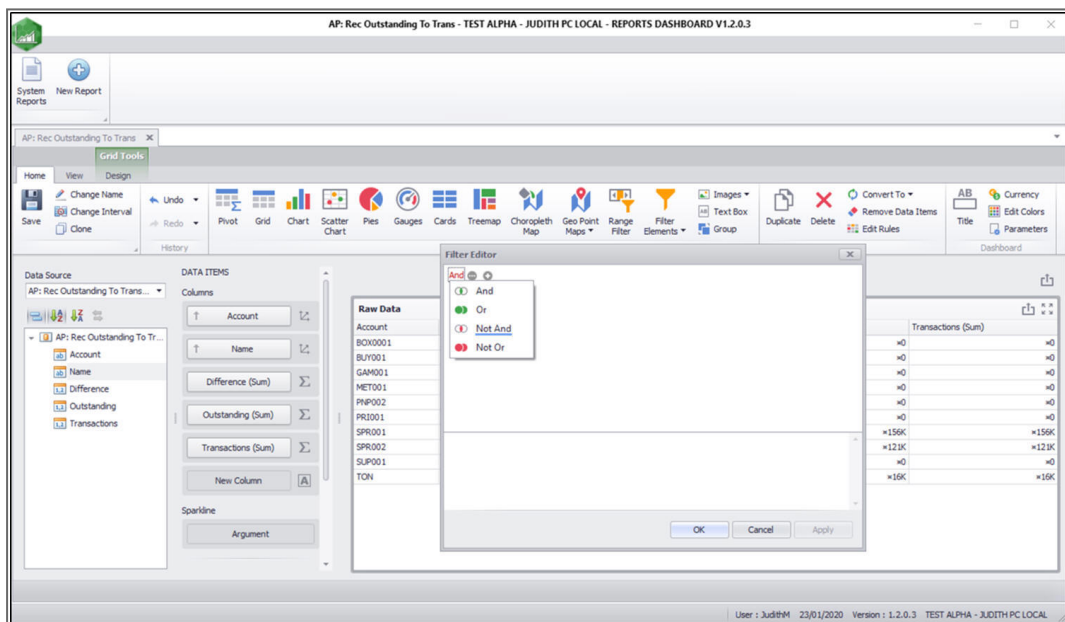
- The *Filter Editor* screen will be displayed.
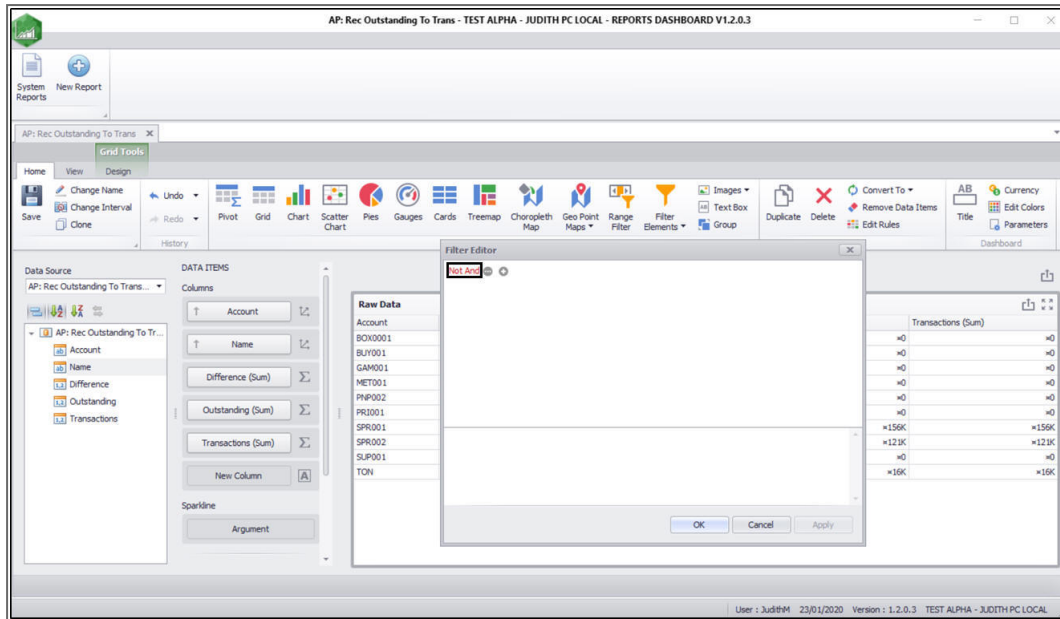- Click on the *red 'And'* text in the *Filter Editor*.



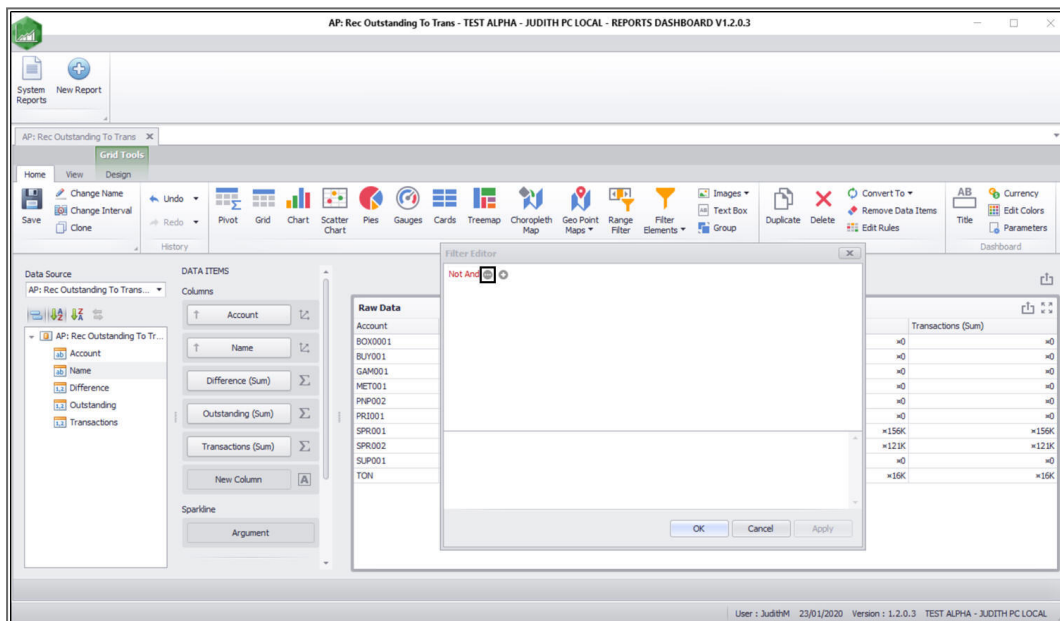- This will bring up a *drop-down menu* with options to change the current filter selections.

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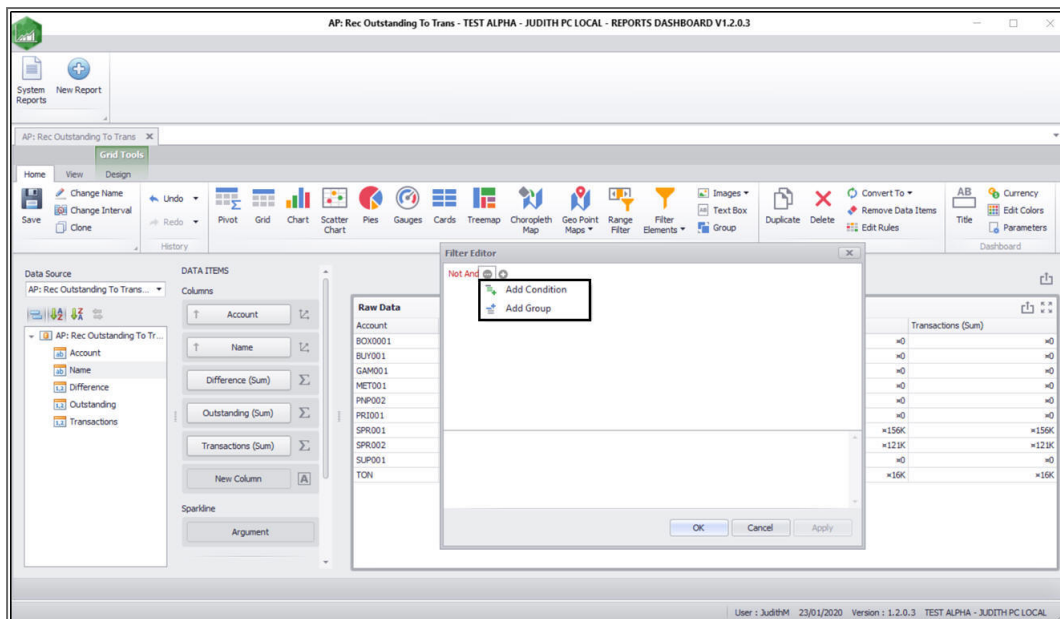- In this image, *Not And* has been selected.



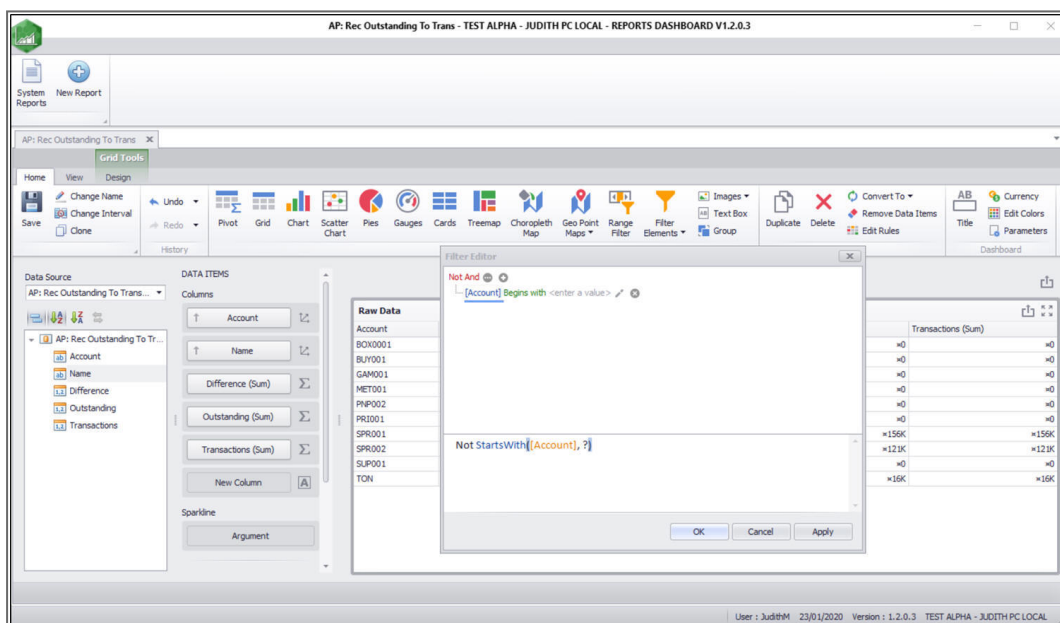- *Not Add* instead of *'And'* is now displayed in the *Filter Editor*.

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



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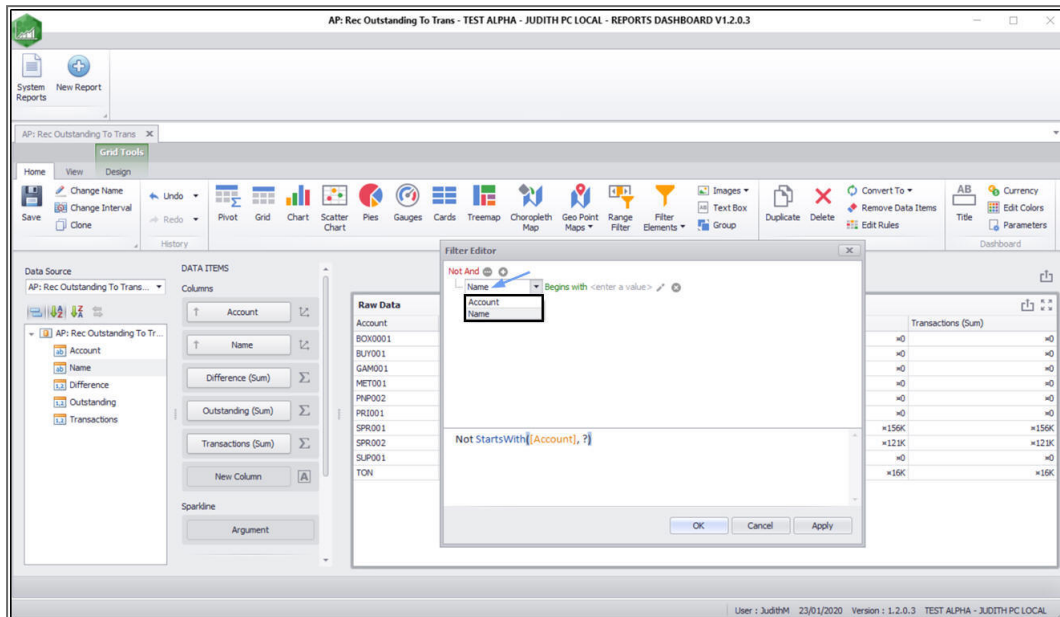- Select the required action.

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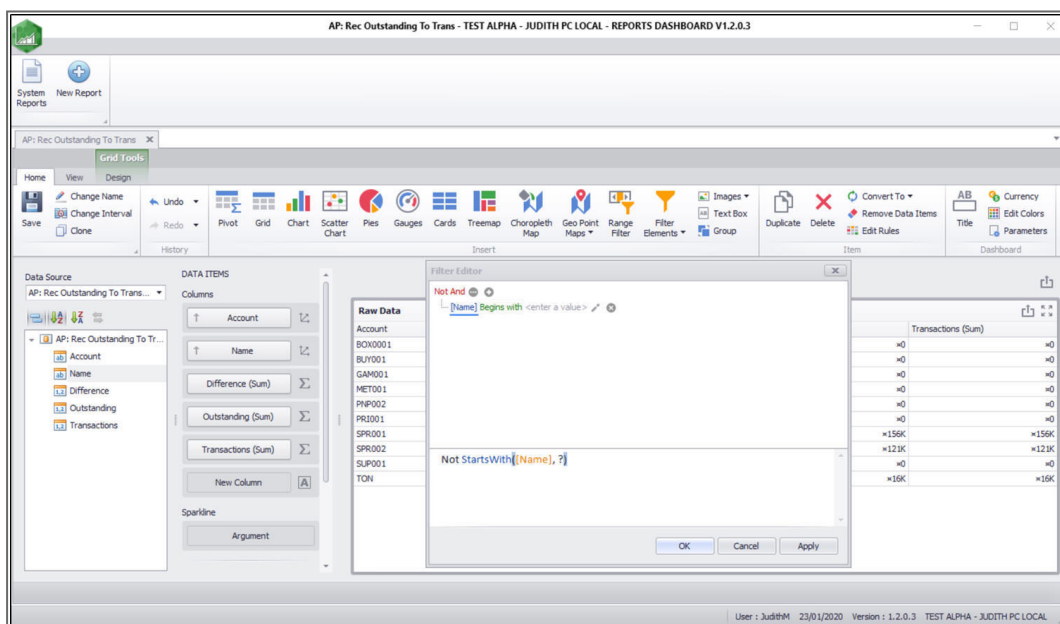


- A list of titles will be displayed.
- Click on any of these titles to **_change_** the column that is being

filtered.

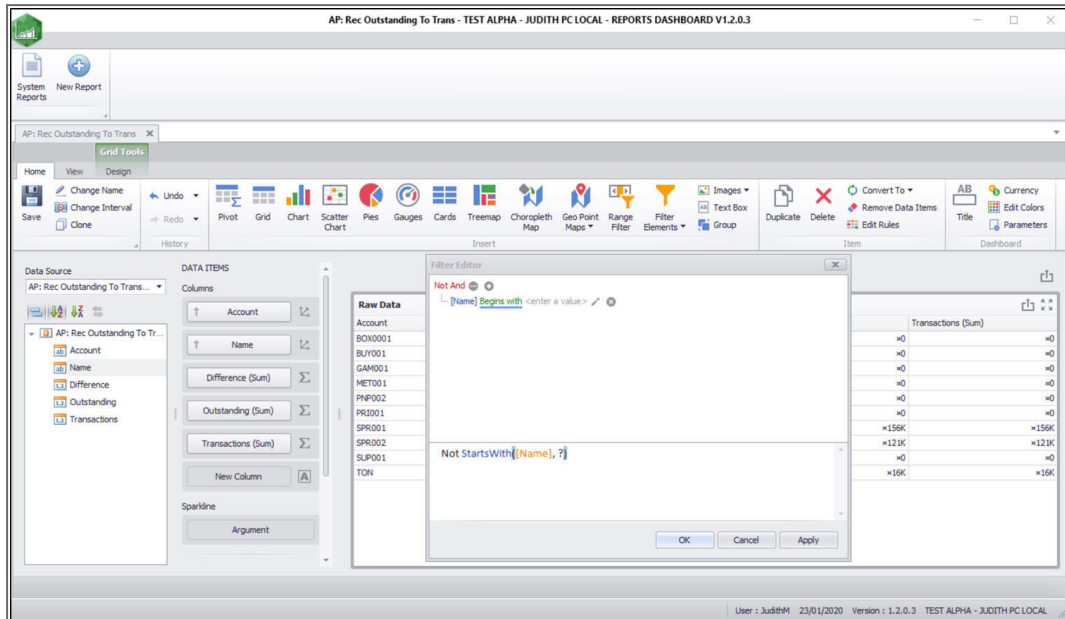- In this image, the *Name* column has been selected.



- In this image, the *Filter Editor* will now displays *Name* as its column filter instead of *Account*.
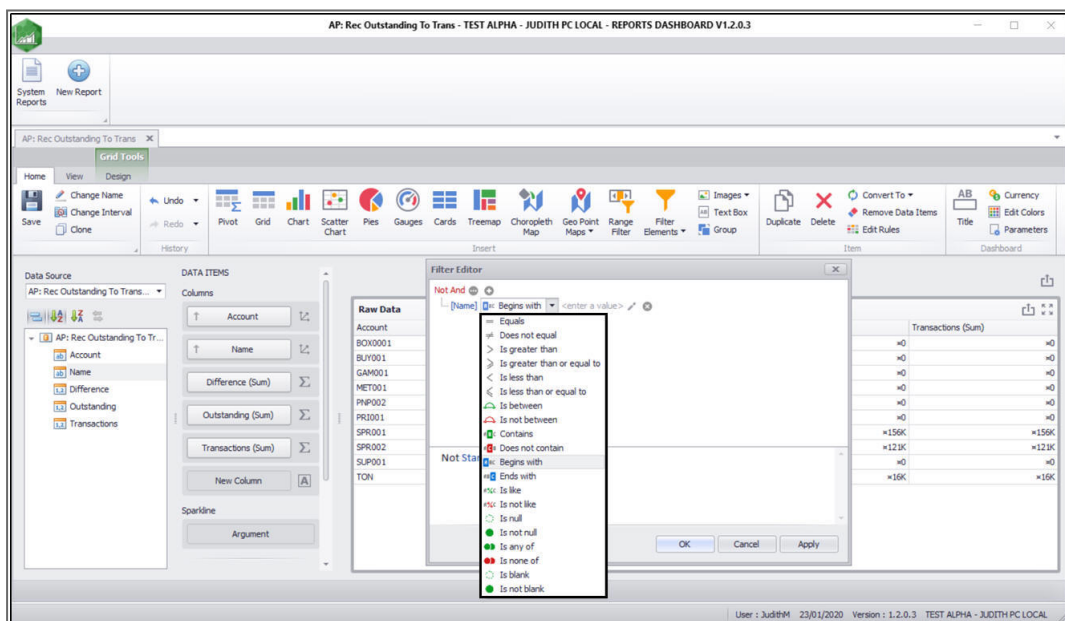
- Click on any one of the **green text**. (These are all the **methods** of filtering available in this data grid.)
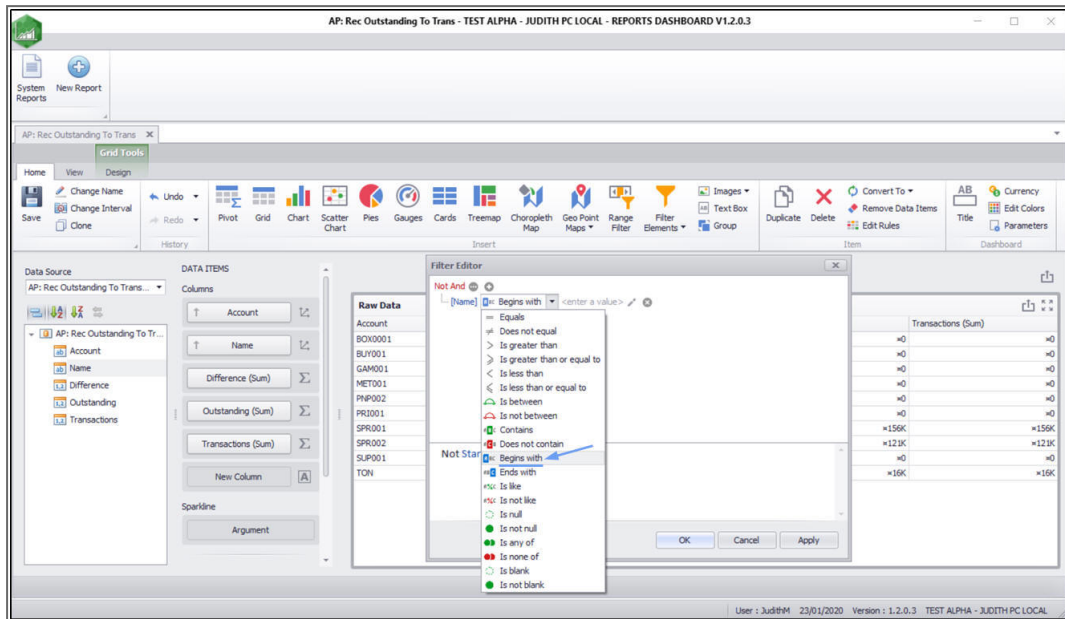


- A pop up menu will display a list of the filter **method options** for the selected column.
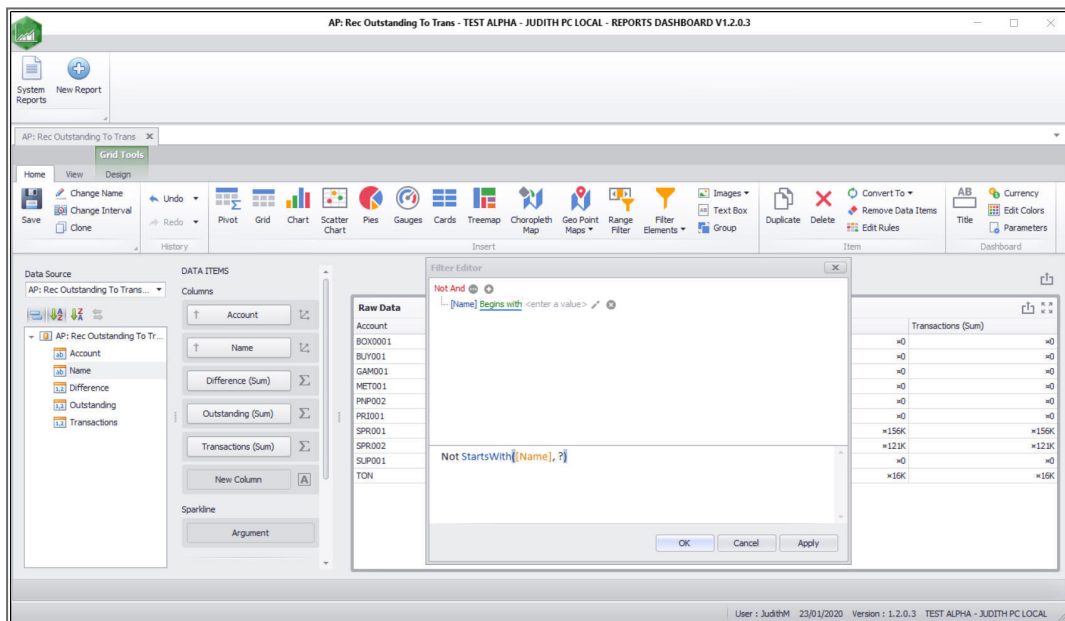
- Click on any one of these to select the *filter method* required.
- In this image the filter method **Begins with** has been selected.



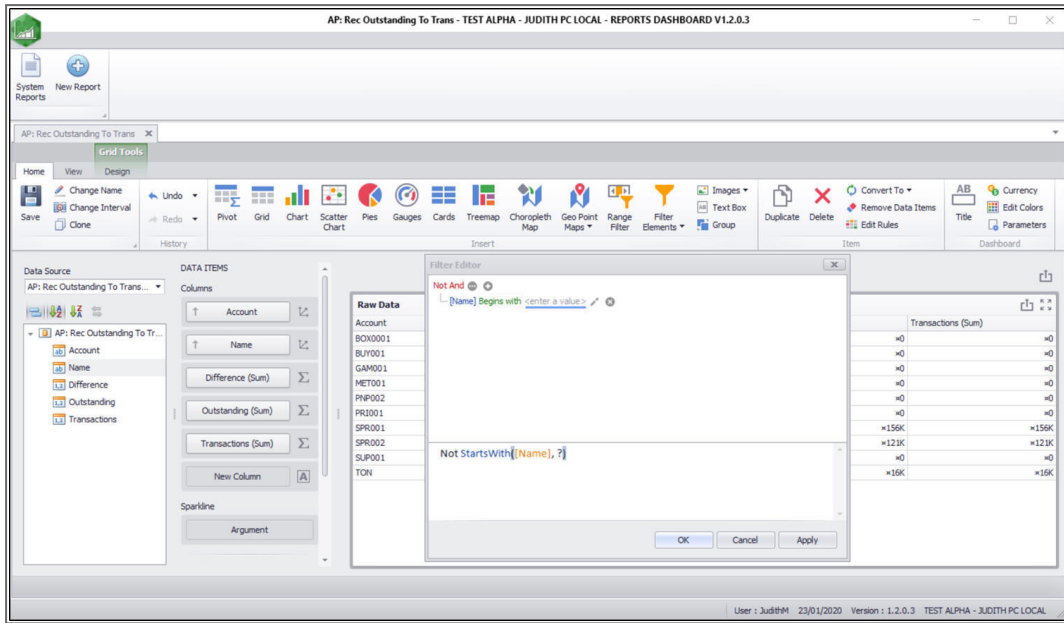- The *Filter Editor* will now display this filter method choice.


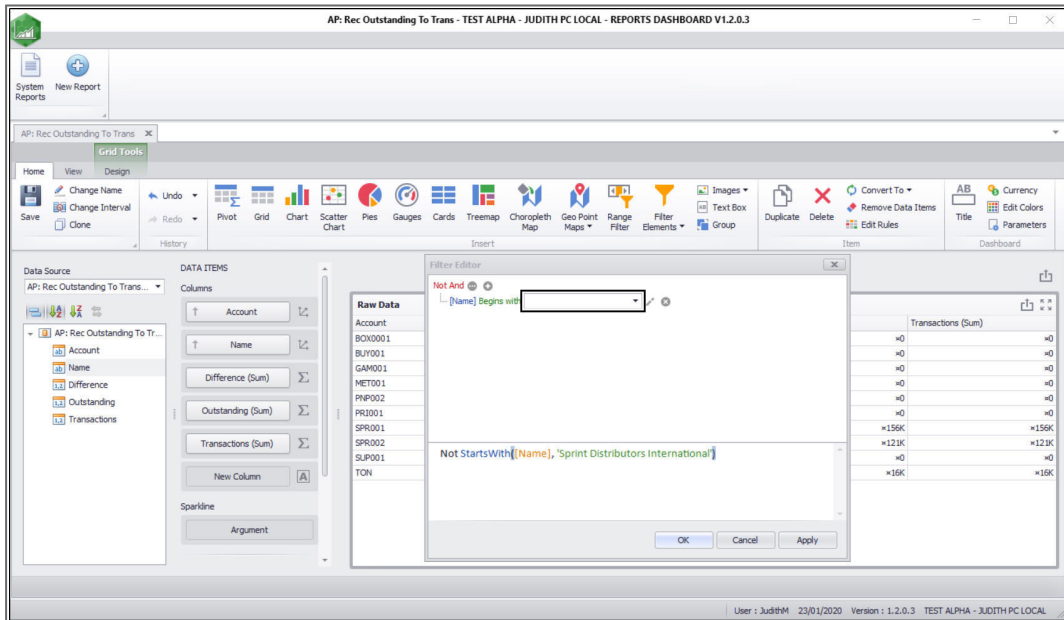
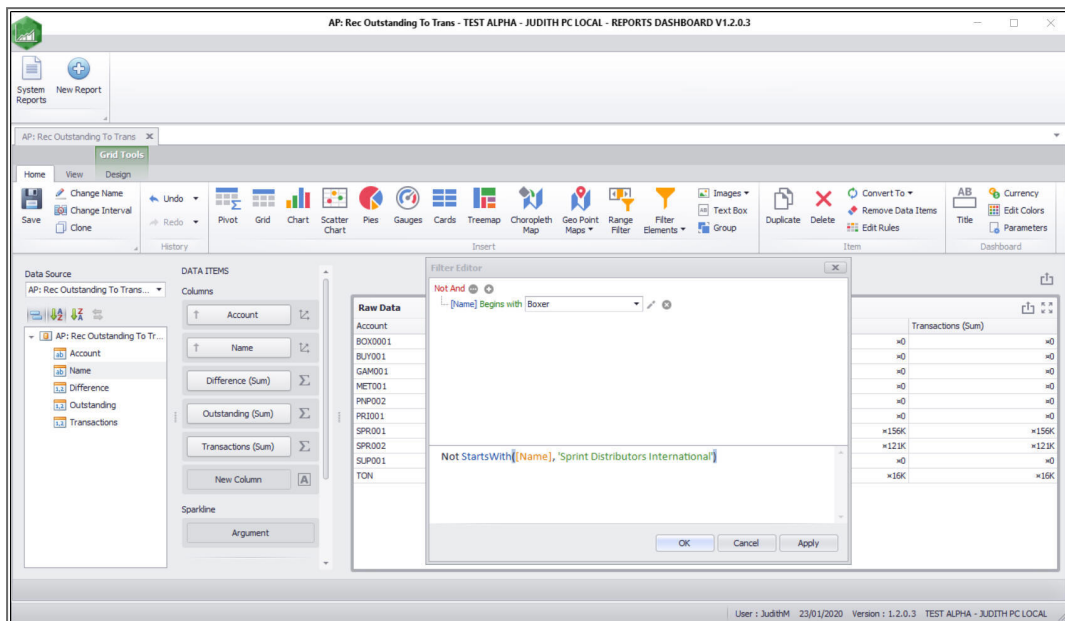- Your filter search parameters needs to be appropriate to the newly selected column and method.
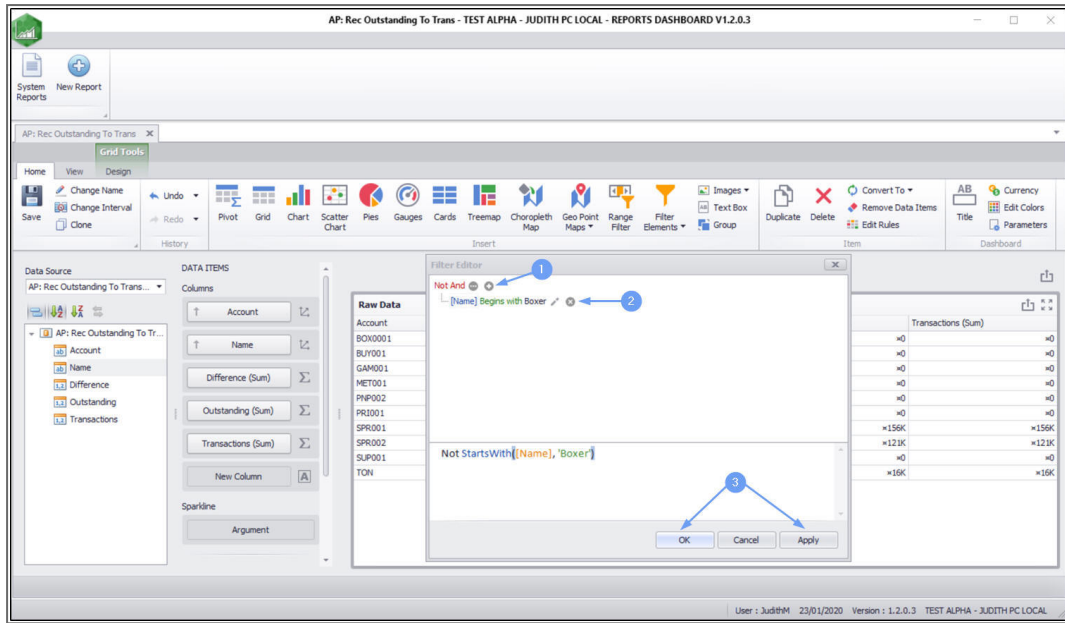
- Click on the *enter a value* text.



- A *text box* will appear.
- Type in or click on the  *down arrow*  and select an appropriate parameter that applies to this particular column ( *Name* ) and filter method ( *Begins With* ).
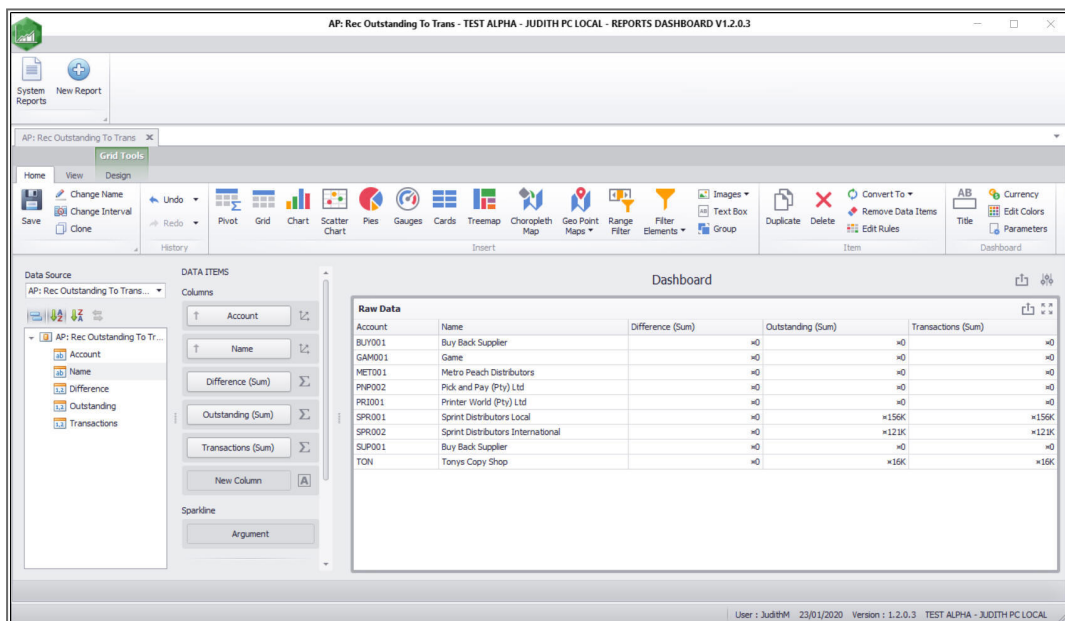
- The text box in the *Filter Editor* is not case sensitive, you can type in any part of a word or number.
- In this image, *Boxer* has been selected.



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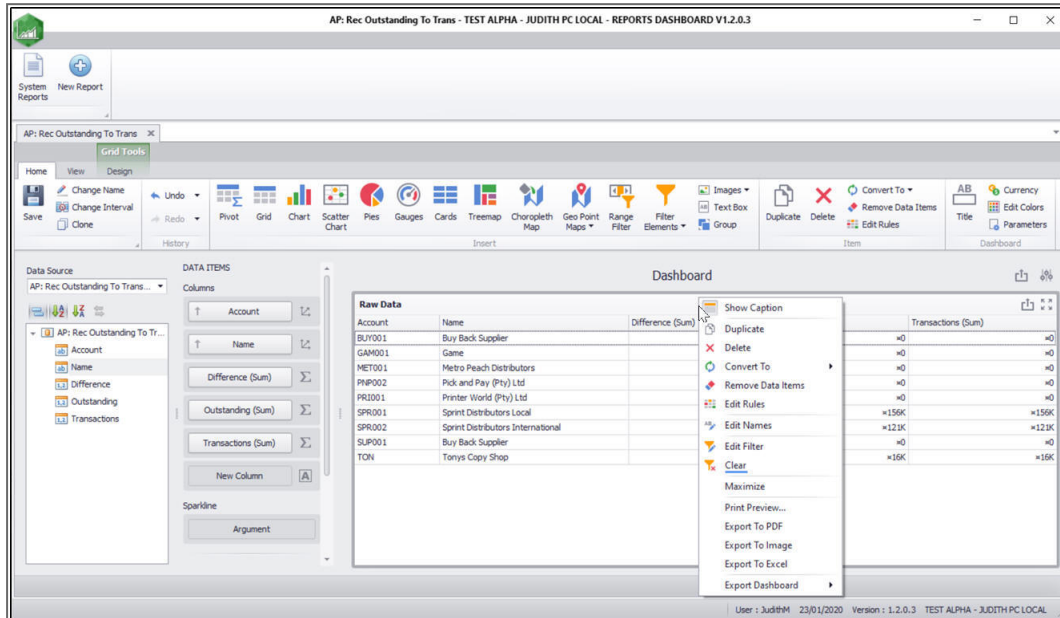
- The selected filter will be applied to the dashboard item.
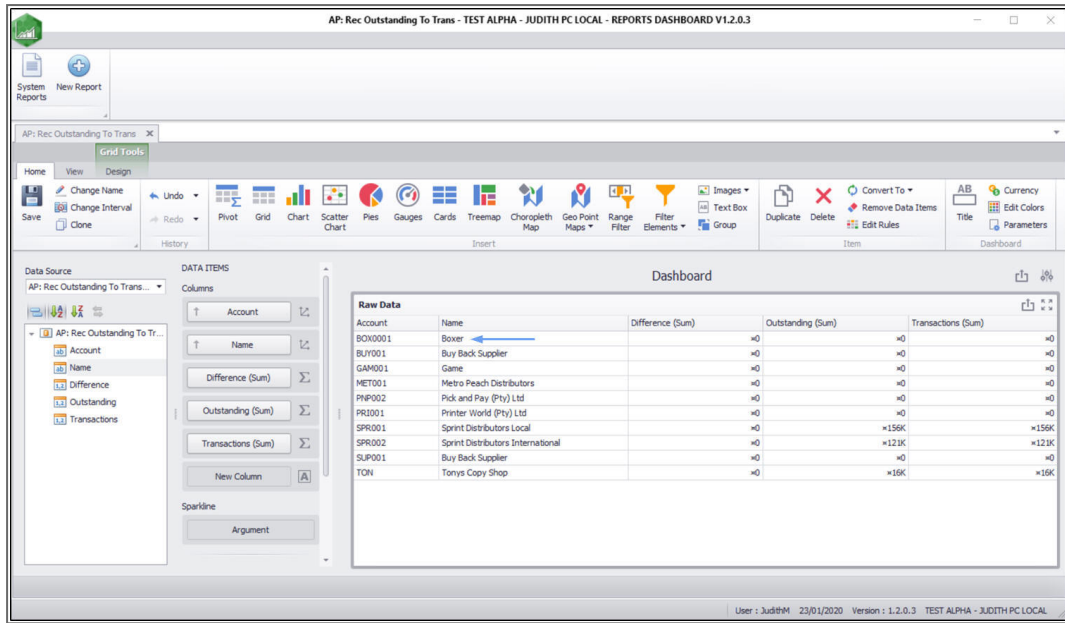- In this image, *Boxer* is no longer displayed in the dashboard item.

# CLEAR A DASHBOARD FILTER

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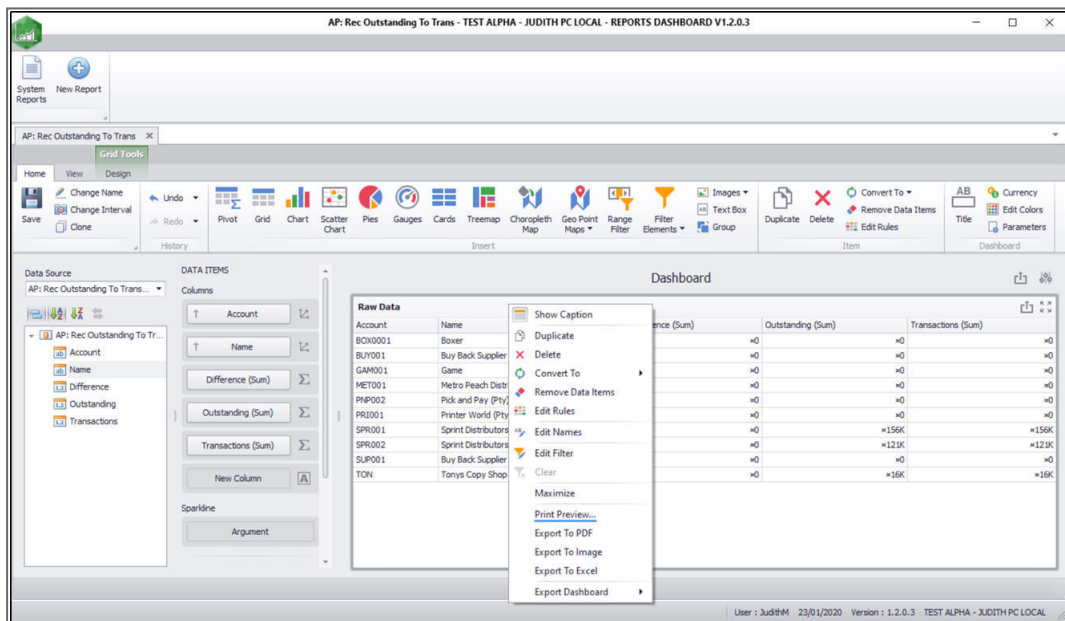


- The column filter will be cleared.
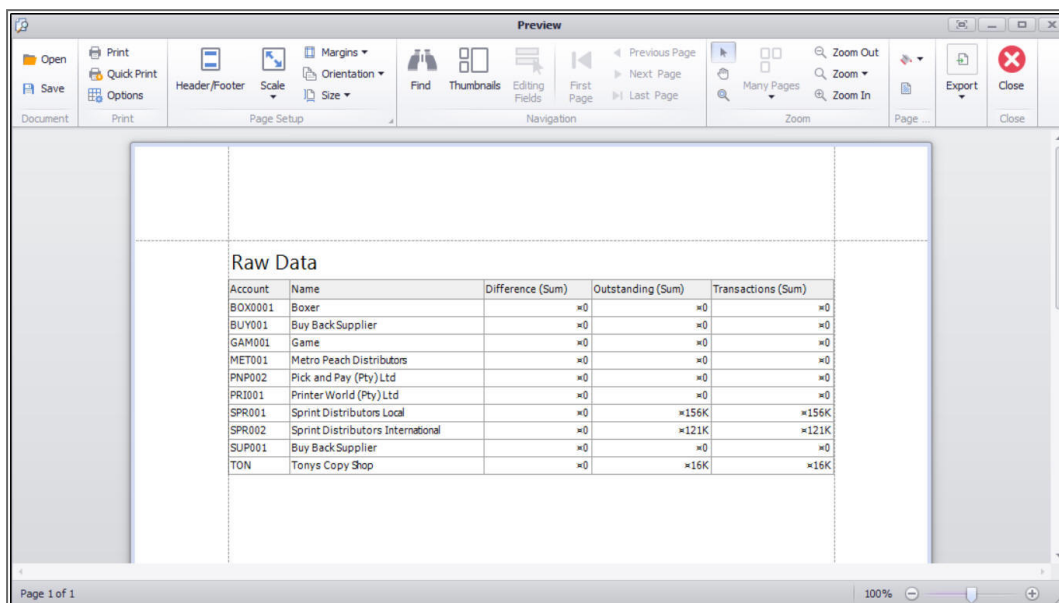- In this image, *Boxer* is now displayed in the selected dashboard item.

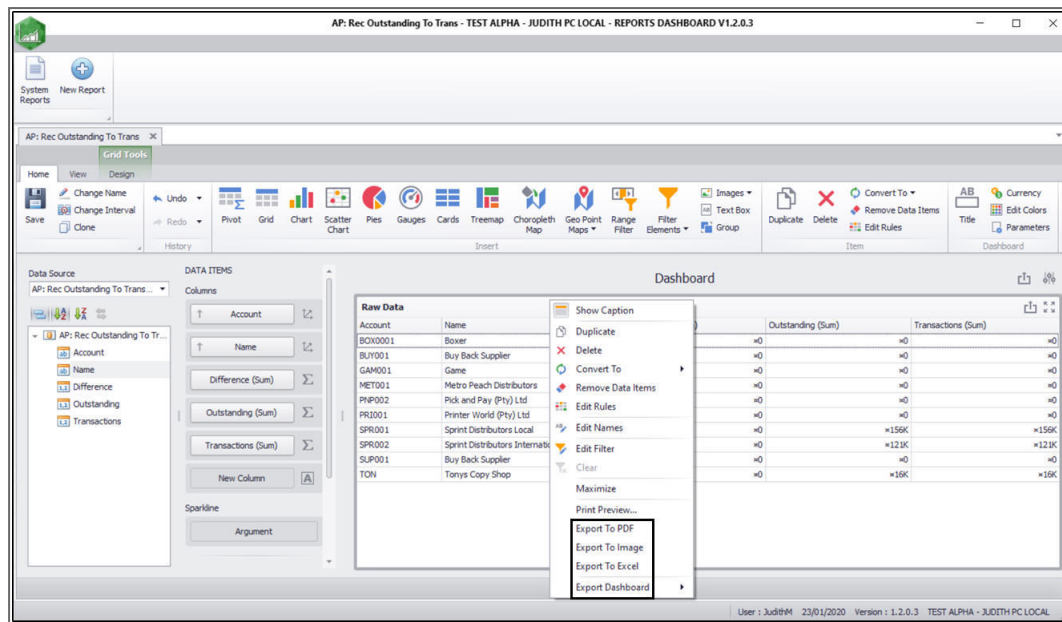# PRINT PREVIEW A DASHBOARD ITEM

- 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.

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## Related Topics

- Change dashboard report title
- Set default currency
- Edit dashboard colours
- Change report name
- Change report interval
- Clone Report

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