



User Guide

Dashboard
V21.1.0200

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EFI PrintStream | V21.1.0200 Dashboard User Guide

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Introduction

Overview

Welcome to EFI PrintStream. The Dashboard module is an add-on product which allows you to build SQL queries that can be used to generate a Chart, Gauge, or Pivot type of report. You can create a customized Dashboard menu, adding reports and dynamic panels. You can also control access to these features on a plant and user level.

This guide will show you how to use the Dashboard module which includes using queries and creating reports. Please contact your EFI Sales Representative for more information on how to purchase and set up PrintStream Dashboard.

Note This guide assumes the user is familiar with creating SQL queries.

Contact Information

EFI Support

Web Site	https://customer.efi.com/support
US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
E-mail:	printstream.support@efi.com
Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.	
Note	For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

Dashboard



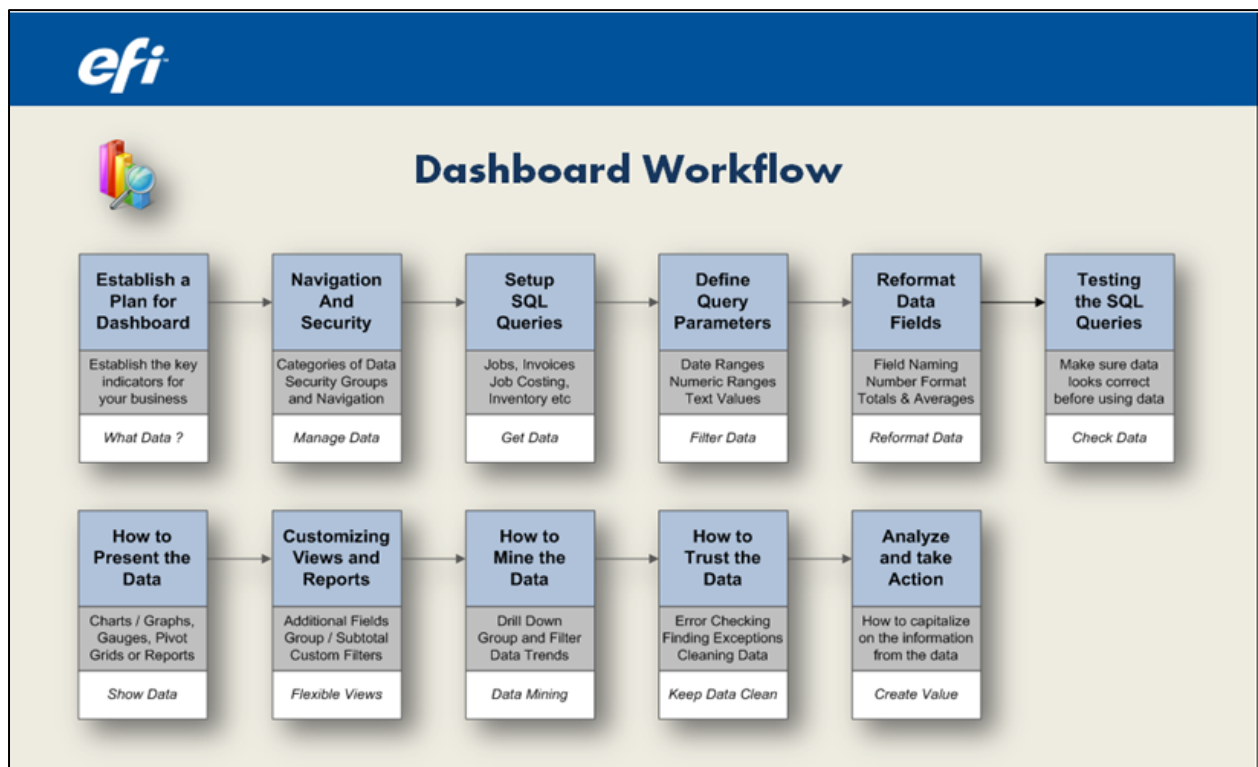
Dashboard is a powerful tool for obtaining and analyzing the data you are collecting. Before you can start to create queries for reports you should determine how and why you will use Dashboard. You can use Dashboard to measure and analyze the following areas of your business:

- **Jobs Created** – to manage pipeline and CSR and production workload
- **Invoiced Sales** – to understand projected sales and Top 10 customers etc.
- **Shop-Floor Transactions** – to analyze productivity and rework or spoilage
- **Inventory Transactions** – to manage warehouse space and re-ordering
- **Jobs In Progress** – to manage On Time delivery and Production priorities
- **Purchase Orders** – to manage cash requirements and pending expenses
- **Job Costing Transactions** – to analyze run speeds & employee performance
- **Fulfillment Order Data** – to understand Orders, Releases, Shipments and more
- **Estimates Created** – to analyze quoting activity and pending opportunities

Dashboard Workflow

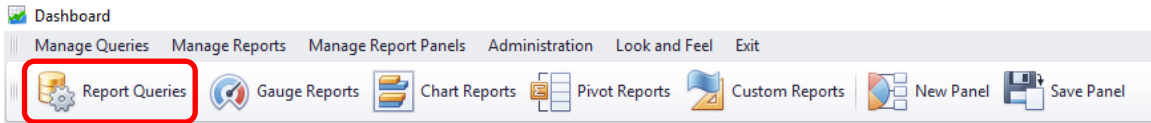
The following workflow was designed to help you get the most out of the Dashboard. This guide can help you with the details of how to use Dashboard, you must put in the proper preparation before you build that first query.

Note Please contact your EFI Representative for the *Dashboard Overview* PowerPoint presentation. This presentation details how to identify your business needs to best use Dashboard in your plant.



Report Queries

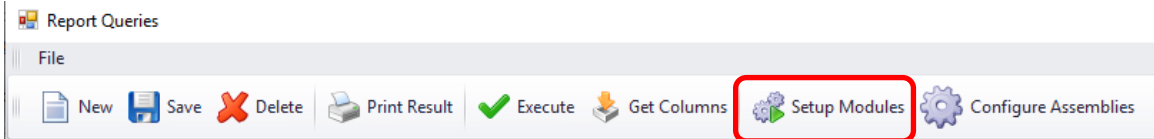
To extract the data you need, you must create SQL Queries. These Queries are used to create reports where you can analyze the data. To begin working with Queries select the **Report Queries** icon as shown below.



Organizing Queries

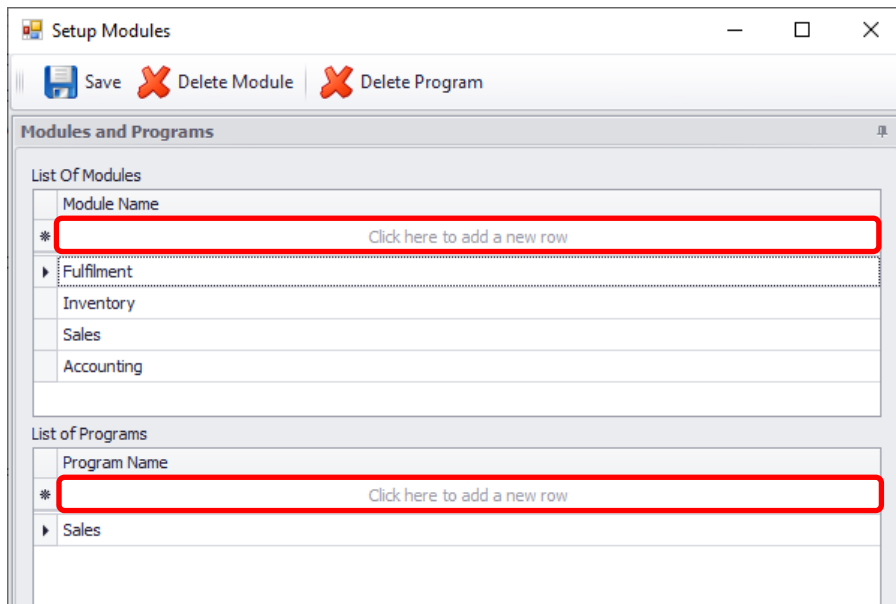
Before you begin to add queries to the list, you should first think about how to keep your queries organized. As the library grows it will be important to maintain some organization of all queries. **Modules** are the first level of how you will organize your queries. For example, Estimating, Jobs, Inventory, etc. **Programs** are a sub-category of a Module and are defined within the Module. For example, under a Jobs module you may have programs for Bookings, Jobs in Progress, Shipments, etc.

Select the **Setup Modules** icon to define modules and program groups. As you create queries you will be able to assign them to program and module groupings.



To create a Module or Program

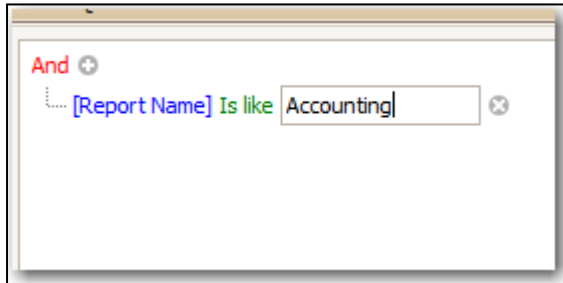
1. Select the **Setup Modules** icon.
2. Under **Module Name**, click in the upper row and enter a name. Under **Program Name**, click in the upper row and enter a name.



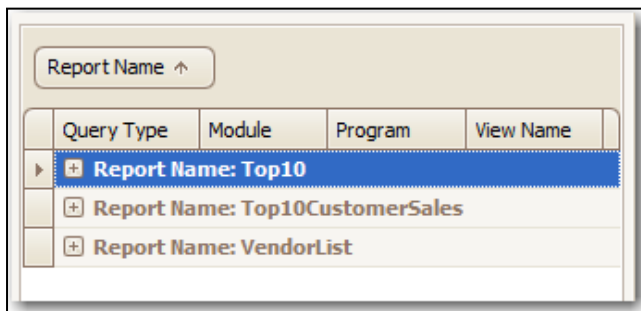
3. Click **Save**.

Searching for Queries

In addition to having two levels for grouping and organizing queries, there is also a search function available from the query screen.



You can sort the results by column. Simply click and drag any of the column titles to the header to group by that area. This can also be done with multiple levels; groups and sub groups.



Adding a New Query

In the Report Queries window of Dashboard is where you will design your queries. Typically, users build SQL queries in the SQL database and then cut and paste them into Dashboard here.

Report Queries

File New Save Delete Print Result Execute Get Columns Setup Modules Configure Assemblies

List of Queries

Query Properties

Query Type: SQL ☒ Active

Query Name: StorageReportSum Report Name: Storage Report Summary

Module: Inventory Program: Inventory

Query:

```
SELECT D.[DEBTGROUP CODE] AS ReportingGroup,
D.[AC NO] as CustomerAcctNo,
D.[NAME] as CustomerAcctName,
HD.[TYPE] as LocationType,
HD.[DESCRIPTION] as LocationDescription,
STK.LOCATION as ItemLocation,
G.DESCRPTION as InvGroup,
F.DESCRPTION as InvFamily,
```

Parameters:

Parameter Name	Parameter Type	Parameter Value

☐ Gauge ☐ Chart ☒ Report ☒ Dynamic Search (Pivot Reports)

Query MetaData

Query Results Columns

Drag a column header here to group by that column

ReportingG...	CustomerA...	CustomerA...	LocationType	LocationDe...	ItemLocation	InvGroup	InvFamily	InvCategory	Cartons	PcsPerCart...	LoosePeces	...
0	...	Hedro #8	F	TESTLOCA...	.NETTestLac1				10	10	0	100
0	...	Hedro #8	P	TESTLOCA...	.NETTestLac1				1	1	0	1
									12000002...	194016.1...	3958	1-4814817...

Columns retrieved by the Query are shown in the Columns tab.

To add a query

1. From the Query window click **New**.
2. In the Query Properties window enter the following:

Query Type: SQL

Query Name: Enter a text name. Cannot contain spaces or special characters.

Report Name: This name will display in Dashboard for this query.

Model / Program (optional): Select a Module and/or Program to categorize the query.

Query: Enter the SQL query. You can also cut and paste an existing SQL query into this field.

Query Properties

Query Type: SQL ☒ Active

Query Name: CountOfSalesOrders Report Name: CountOfSalesOrders

Module: Fulfillment Program: Sales Orders

Query:

```
SELECT
COUNT(SALES_ORDER.SO_ID) AS OrderCount
```

3. Click **Save**.

Query Parameters

Configure query parameters into the SQL Query to reduce the number of rows retrieved. By adding parameters in the WHERE clause of the SQL Query in a specific way you can significantly reduce the number of rows of data that the query needs to retrieve as well as provide the ability for a user to change these parameters when running a report.

Parameters can be set to default to specific values for each time the query runs. Select from the **Parameter Value** drop-down list.

Parameter Name	Parameter Type	Parameter Value
@Date_FromDate	System.DateTime	@DateThisCalYearStart
@Date_ToDate	System.DateTime	@DateThisCalYearStart
Parameters :		ContextName @DateThisQtrStart @DateThisQtrEnd @DateNextQtrStart

Parameter Syntax

There are the three standard syntax choices for parameters used in SQL Queries:

Dates – Use when the query should only return rows where a date in the specified database field is greater than or equal to @Date_From

- Parameters must begin with the following characters: “@Date_”

Numbers – Use when the query should only return rows where a numeric value in the specified database field is less than @Numeric_MaxUsageQty

- Parameters must begin with the following characters: “@Numeric_”

Text Values – Use when the query should only return rows where the text value in the specified database field contains a value like @String_ShipStatus

- Parameters must begin with the following characters: “@String_”

Working with Date controls

Dashboard provides a list of pre-defined constants for dates which can only be used in the ‘where’ clause of the Report Query for the date field. Below is the list of defined constants for Date fields, which can be used in queries and will replace the constant with the actual values, while executing the report against it.

The first column lists the predefined constant. The second column displays the value which will be replaced when the query is executed.

For example, if you select today’s date (today being 1/1/2016) from the calendar control, the query will always run against the 1/1/2016 date. However, if you select @DateToday from the predefined constants, the query will always run on the current date of when you run the query – not a fixed date. So if you use @DateToday on 1/2/2016 the data will be for 1/2/2016 automatically. You do not have to update the calendar control.

Constant	Value that will be replaced dynamically.
@DateToday	Today's Date
@DateYesterday	Date on Yesterday
@DateTomorrow	Tomorrows Date
@DateThisMonday	Monday of current week. (Specific Date this week based on day of week)
@DateThisTuesday	Tuesday of current week. (Specific Date this week based on day of week) etc.
@DateNextMonday	Monday of Next week. (Specific Date next week based on day of week)
@DateNextTuesday	Tuesday of Next week. (Specific Date next week based on day of week) etc.
@DatePrevMonday	Monday of previous week. (Specific Date previous week based on day of week)
@DatePrevTuesday	Tuesday of previous week. (Specific Date previous week based on day of week) etc.
@DateThisCalMonthStart	Start date of this Calendar Month

Constant	Value that will be replaced dynamically.
@DateThisCalMonthEnd	End date of this Calendar Month
@DateNextCalMonthStart	Start date of Next Calendar Month
@DateNextCalMonthEnd	End date of Next Calendar Month
@DatePrevCalMonthStart	Start date of Previous Calendar Month
@DatePrevCalMonthEnd	End date of Previous Calendar Month
@DateThisFinMonthStart	Start date of This Financial Month
@DateThisFinMonthEnd	End date of This Financial Month
@DateNextFinMonthStart	Start date of Next Financial Month
@DateNextFinMonthEnd	End date of Next Financial Month
@DatePrevFinMonthStart	Start date of Previous Financial Month
@DatePrevFinMonthEnd	End date of Previous Financial Month
@DateThisQtrStart	Start date of this Calendar Quarter
@DateThisQtrEnd	End date of this Calendar Quarter
@DateNextQtrStart	Start date of Next Calendar Quarter
@DateNextQtrEnd	End date of Next Calendar Quarter
@DateLastQtrStart	Start date of Previous Calendar Quarter
@DateLastQtrEnd	End date of Previous Calendar Quarter
@DateThisCalYearStart	Start date of This Financial Quarter
@DateThisCalYearEnd	End date of This Financial Quarter
@DateNextCalYearStart	Start date of Next Financial Quarter
@DateNextCalYearEnd	End date of Next Financial Quarter
@DateLastCalYearStart	Start date of Previous Financial Quarter
@DateLastCalYearEnd	End date of Previous Financial Quarter
@DateThisCalYearStart	Start date of this Calendar Year
@DateThisCalYearEnd	End date of this Calendar Year
@DateNextCalYearStart	Start date of Next Calendar Year
@DateNextCalYearEnd	End date of Next Calendar Year
@DatePrevCalYearStart	Start date of Previous Calendar Year
@DatePrevCalYearEnd	End date of Previous Calendar Year
@DateThisFinYearStart	Start date of This Financial Year
@DateThisFinYearEnd	End date of This Financial Year
@DateNextFinYearStart	Start date of Next Financial Year
@DateNextFinYearEnd	End date of Next Financial Year
@DatePrevFinYearStart	Start date of Previous Financial Year
@DatePrevFinYearEnd	End date of Previous Financial Year

Defining How the Query Will Be Used

Select the boxes that apply; Gauge, Chart, Report, and/or Dynamic Search.

<input checked="" type="checkbox"/> Gauge	<input checked="" type="checkbox"/> Chart	<input checked="" type="checkbox"/> Report	<input checked="" type="checkbox"/> Dynamic Search (Pivot Reports)
---	---	--	--

Note The Dynamic Search option is used with the Pivot Grid reports and allows for parameters to be selected at run time.

Query Results

You should test and review your query before using it to create charts or reports. Select the **Execute** (green check) icon to return the query results in the **Query Results** tab.

The screenshot shows the 'Report Queries' window. The 'File' menu bar includes 'New', 'Save', 'Delete', 'Print Result', 'Execute' (highlighted with a red box), 'Get Columns', 'Setup Modules', and 'Configure Assemblies'. Below the menu bar, the 'Query MetaData' tab is active, showing a table of query results.

AC NO	ACTIVE	AD1	AD2	AD3	ADDRESS NO	APGLDISS RECNUM	COMPANY CODE	CONT	CURRENCY TYPE	DATAFLEX RECNUM ONE	DISC	DUNNBRAD REF	FED
100	Y	445 west m...	Memphis, TN		0	18 01	leah	USD	1	0	LV MAIN		
*84020	Y	650 E 1230...	Draper, UT		0	18 01	postmaster	USD	2	0	O15290		
*84070	Y	8850 S 700...	Draper, UT...		0	0 01		USD	3	0			
DPHOUSE	Y	Suite 455	543 Third S...	Waterton, UT	0	0 01	Bill Gettalk	USD	4	0			
54321	Y	# 1 Stream...	...	Draper, UT...	0	14 01	The Mail M...	USD	5	0			
400	Y				0	17 01		USD	6	0			
POST	Y	kentucky b...			0	0 01		USD	7	0			
BOBS	Y	suite 66 ...	463 West ...	Waterton, ...	0	26 01	Betty Lou ...	USD	8	0	45 g4566 ...		
150	Y	12345 Sout...		Draper, UT...	0	0 01		USD	9	0			
500	Y	1155 Main ...		Draper, UT	0	0 01	Dave	USD	10	0			
ACM01	Y	3500 Califo...		Salt Lake Ci...	0	11 01	Fred Flintst...	USD	11	0			
1002	Y	135-139 M...	P.O. BOX 2...	Kenilworth ...	0	0 01		USD	12	0			
1006	Y	1230 SOLV...		CHICAGO ...	0	0 01		USD	13	0			
1016	Y	P.O. BOX 9...		Lakeland ...	0	0 01		USD	14	0			

Refining Query Results

From the **Columns** tab you can perform additional filtering and manipulation. Each field within the table(s) in the main query will be displayed here.

The screenshot shows the 'Query MetaData' window with the 'Columns' tab selected. It displays a table of columns for the 'Table Name: StorageReportSum'. Red arrows point to specific columns with annotations: 'Choose the format type.' points to the 'Format String' column, 'Make the field visible' points to the 'Is Visible' column, and 'Chose how the field will be summarized.' points to the 'Summary Type' column.

Table Name	Database Column Name	Caption	Format String	Is Visible	Summary Type	Data Type
Table Name: StorageReportSum	ReportingGroup	ReportingGroup		<input checked="" type="checkbox"/>		varchar
	CustomerAcctNo	CustomerAcctNo		<input checked="" type="checkbox"/>		char
	CustomerAcctName	CustomerAcctName		<input checked="" type="checkbox"/>		varchar
	LocationType	LocationType		<input checked="" type="checkbox"/>		char
	LocationDescription	LocationDescription		<input checked="" type="checkbox"/>		varchar
	ItemLocation	ItemLocation		<input checked="" type="checkbox"/>		varchar
	InvGroup	InvGroup		<input checked="" type="checkbox"/>		varchar
	InvFamily	InvFamily		<input checked="" type="checkbox"/>		varchar
	InvCategory	InvCategory		<input checked="" type="checkbox"/>		varchar
	Cartons	Cartons	Number (0 Decimal)	<input checked="" type="checkbox"/>	Max	float
	PcsPerCartons	PcsPerCartons	Number (0 Decimal)	<input checked="" type="checkbox"/>	Average	float
	LoosePieces	LoosePieces	Number (0 Decimal)	<input checked="" type="checkbox"/>	Count	float
Qty	Qty	Number (0 Decimal)	<input checked="" type="checkbox"/>	Sum	float	

Choose the format type.

Make the field visible

Chose how the field will be summarized.

Export Results

Select the **Print Results** icon to generate a report directly from the Query screen. Export the results into several different formats if you need to. You can then easily group and sort the data to create a simple report.

Report Queries

File

New

Save

Delete

Print Result

Execute

Get Columns

Setup Modules

Configure Assemblies

Preview

File View Background

130%

Test

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PDF File

HTML File

MHT File

RTF File

XLS File

XLSX File

CSV File

Text File

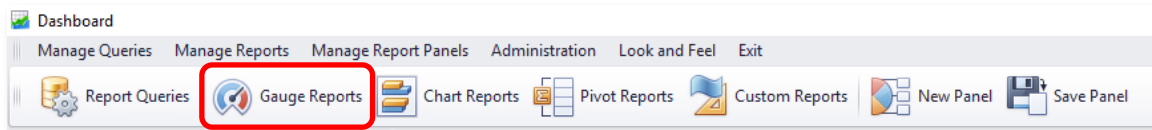
Image File

Reporting Group	Customer Acct	Customer Acct Na	Location Type	Location Description	Item Location	Inv Group	Inv Family	Inv	Is	Pcs Per Carton	Loose Pieces	Qty	
	0	Hasbro #8	F	TESTLOCAT	.NETTestLoc					10	10	0	100
	0	Hasbro #8	P	TESTLOCAT	.NETTestLoc					1	1	0	1
NEWCODE	001	Sunshine, LL		Imported Lo	M210					2	3499	2	7000
NEWCODE	001	Sunshine, LL		Row F.Rack	RF.R1.L2					27	2152.25	933	76110
NEWCODE	001	Sunshine, LL		Row S.Rack	S.06.2					12	2	8	32
NEWCODE	001	Sunshine, LL		Row T.Rack	RT.R1.L3					1	12	18	30
NEWCODE	001	Sunshine, LL		Row Y.Rack	Y.02.3					1	121	12	133
NEWCODE	001	Sunshine, LL		Test of Dele	NEW2					12	4	34	82
NEWCODE	001	Sunshine, LL		TESTLOC 2	MSS2					1	12	13	25
NEWCODE	001	Sunshine, LL F		TESTLOCAT	.NETTestLoc					28	39	129	2179
NEWCODE	001	Sunshine, LL F		TESTLOCAT	.NETTestLoc					5	5	1	26

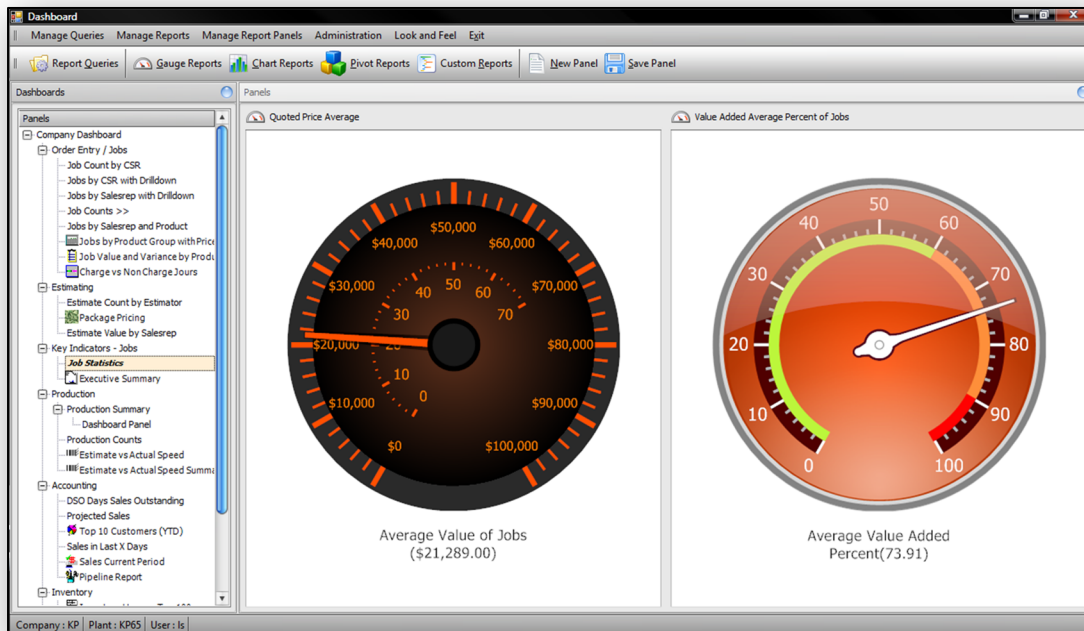
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130%

Gauge Reports



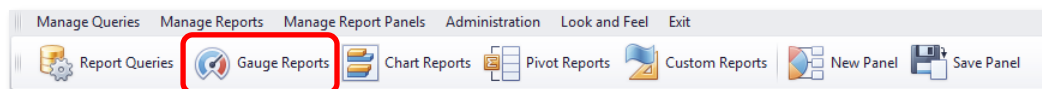
The best use of a gauge is to reflect a single point of information, like a total amount such as total invoices billed for the month. It is a very specific point of data you want to retrieve.



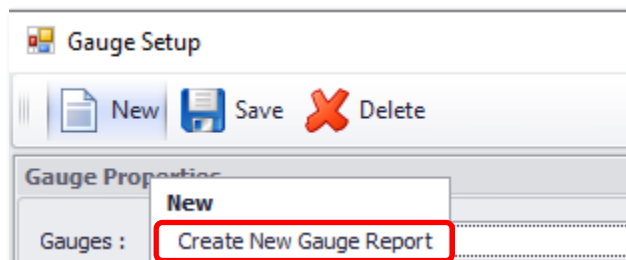
Creating a Gauge

To create a gauge

1. Select the **Gauge Reports** icon.



2. Click **New** and select **Create New Gauge Report**.



3. In the Gauge Properties window, enter the following:

Gauge Name: Enter a descriptive name.

Format String: Choose a format from the drop down list

Report Query: Select the Report Query to be used in the Gauge.

Report column: Select the Report Column option. The Report Column selection is the field within your query that will represent the value.

Gauge Properties	
Gauges :	Test
Gauge Name	Test
Active	<input checked="" type="checkbox"/>
Layout Item Text	Test
Format String	Currency (\$000.00)
Data Binding	^
Report Query	ARagingDataset
Report Column	Period3

3. Select **Gauge Type** to choose the style color display for this gauge. There are five gauge shapes and nine color options to choose from within each shape option. As you click on each one, a visual representation of what the gauge will look like will be displayed.

Gauge Properties	
Gauges :	Test
Gauge Name	Test
Active	<input checked="" type="checkbox"/>
Layout Item Text	Test
Format String	Currency (\$000.00)
Data Binding	^
Report Query	ARagingDataset
Report Column	Period3
Dynamic Search	^
Prompt for Dynamic Search?	<input checked="" type="checkbox"/>
Gauge Details	^

Gauge Options

Gauge Type ^

Gauge Name

- ▶ Gauge Type: Circular Full
- ▶ Gauge Type: Circular Half
- ▶ Gauge Type: Circular Quarter
- ▶ Gauge Type: Circular ThreeFourth
- ▶ Gauge Type: Circular Wide

4. Under Gauge Details define the Gauge **Display Name** and the **Gauge Label**. Defaults for **Maximum** and **Minimum** values for the outer scale as well as a scale factor are included but can be edited to suit personal preference. You can also define font size, tick count and text offset.

Gauge Details ^		
Gauge Type	Circular Full	
Gauge Style	Clean White	
Gauge Display Name	Test Guage Display NAmE	
Gauge Label	Test Guage Label	
Outer Scale ^		
Maximum Value		100
Minimum Value		0
Scale Factor		1
Major Tick Mark ^		
Font Size		8
Tick Count		11
Text OffSet		-17
Minor TickCount ^		
Minor Tick Count		4
Inner Scale ^		
Maximum Value		100
Minimum Value		10
Expected Value		100
Major Tick Mark ^		
Tick Count		10

5. Click **Save**.

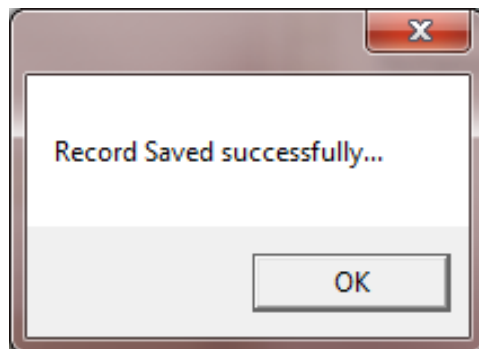


Chart Reports

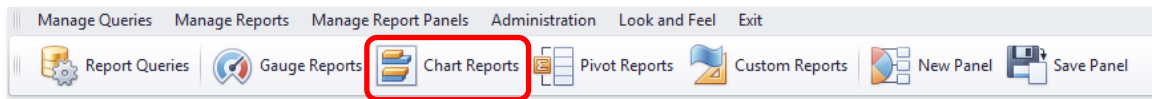
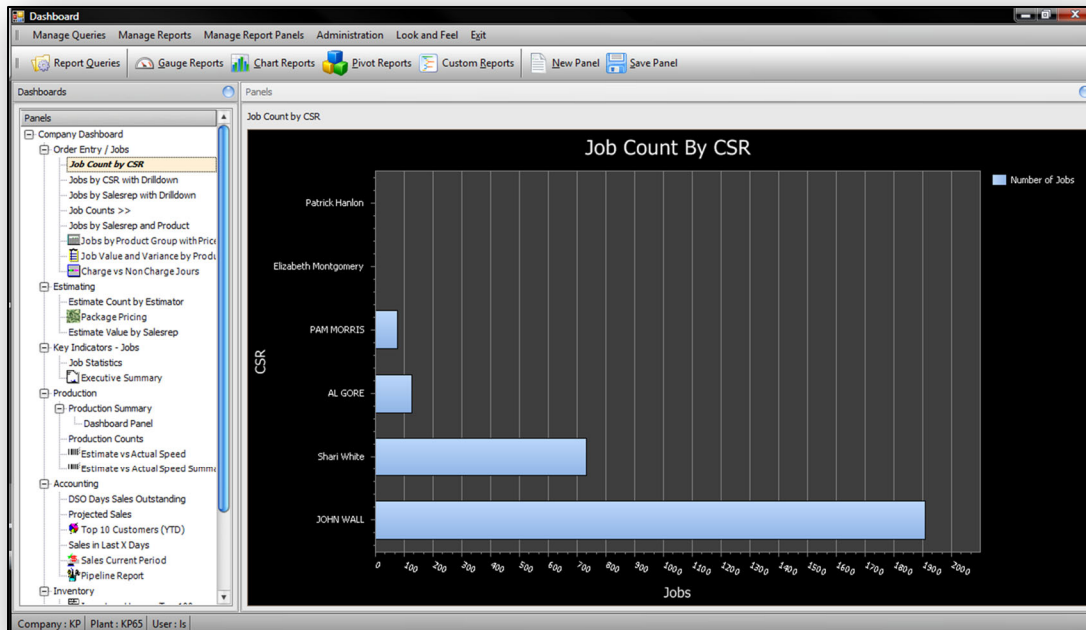


Chart Reports are used to display a graphical two dimensional array of information such as a graph of Total Sales for the month broken out by Sales Person. These can display as charts or graphs.

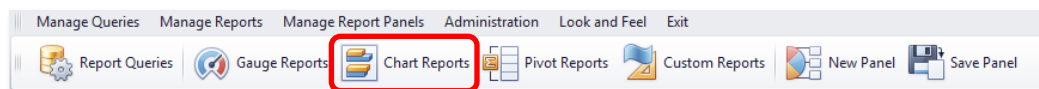


Create a Chart

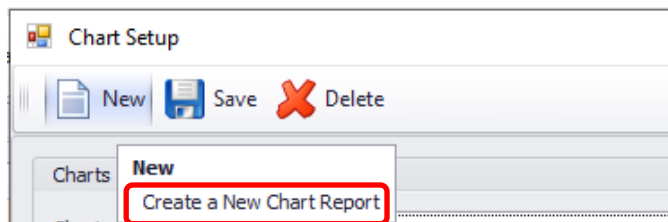
As you create your chart, the display on the right side of the Chart Setup window will reflect your choices.

To create a chart

1. Select the **Chart Reports** icon.



2. Click **New** and select **Create New Chart Report**.



3. In the Chart Setup window, enter the information below.

Chart Name: Enter a descriptive name for the name of this chart.

Chart Header: Enter a descriptive title which will be displayed on the chart.

Axis Labels: Enter descriptive labels for the charts axis lines.

Look and Feel: In this section you can customize the chart display.

The screenshot shows the 'Chart Setup' window with a toolbar containing 'New', 'Save', and 'Delete' icons. Below the toolbar is a 'Charts' section with a dropdown menu set to 'Top 10 Customers'. The main area contains a table with the following data:

Chart Name	Top 10 Customers
Chart Header	Top 10 Customers
Y Axis Label	Total Invoice Amount
X Axis Label	Customer Name
Constant Label	Target Sales
Constant Value	1000
Dynamic Search ^	
Prompt for Dynamic Search?	<input checked="" type="checkbox"/>
Look and Feel ^	
Appearance	Dark
Pallet	Metro

4. Under **Data Bindings** select a **Chart Type** and **Data Source**. The Data Source is an existing report.

The screenshot shows the 'Data Bindings' window. It has a tree view on the left with 'Series 1' and 'Series 2'. 'Series 1' is expanded, and its 'Chart Type' property is selected (highlighted with a red box). The 'Chart Type' dropdown menu is open, showing a list of options: 'BarChart', 'PieChart', 'BarChart', 'LineChart', 'HorizontalBarChart', 'DotChart', 'StackedBarChart', and 'AreaChart'. The 'Data Source' property for 'Series 1' is also visible, showing a dropdown menu with a search icon (X) at the bottom. To the right of the window, a partial view of a report is visible, showing a bar chart with a y-axis labeled 'ce Amo' and values 120 and 140.

Data Bindings			
Series 1			
Chart Type	BarChart		
Data Source	Top10CustomerSales		
Label Name	Report Name	Query Type	Cache Duration
Argument Member	QuoteCountByEstimator	SQL	0
Value Member	SalesByCustomer2018	SQL	0
Drill Down	SalesOrderCountByCustomer	SQL	0
	SalesOrderLineCount	SQL	0
	Shipments	SQL	0
Series 2			
Chart Type	SummaryProjectedSales		
Data Source	Top10CustomerSales		
Label Name	X		

- Enter a **Label Name** and select an **Argument Member** and a **Value Member**. In the example below the data displayed will be YTD sales by Month.

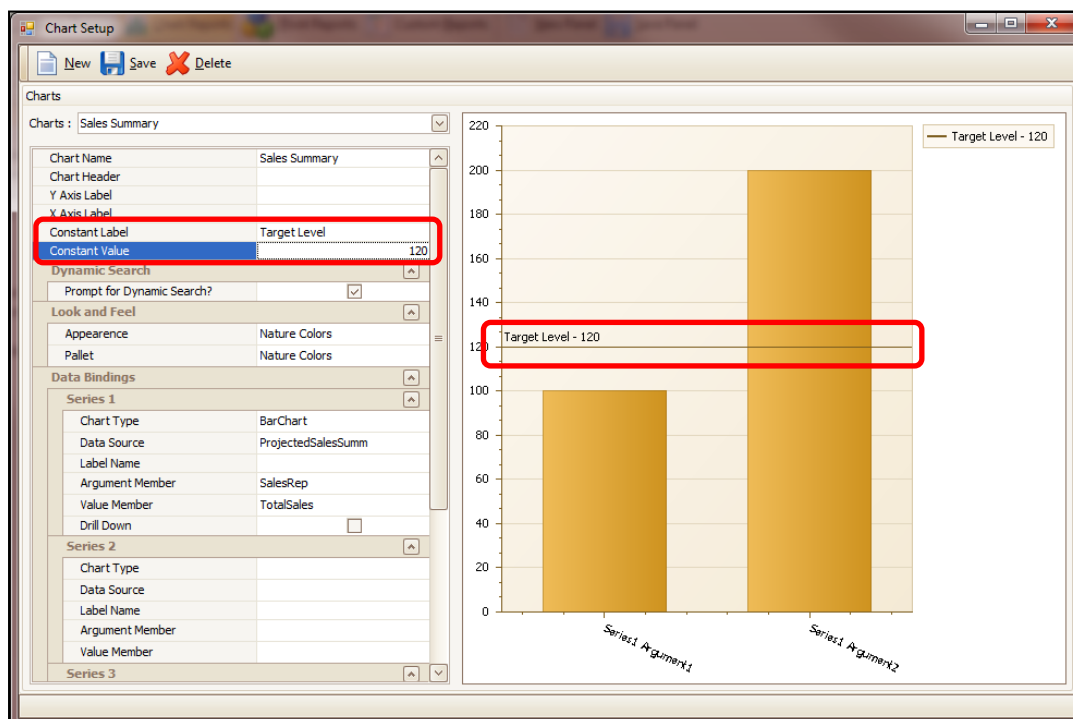
Data Bindings	
Series 1	
Chart Type	BarChart
Data Source	Top10CustomerSales
Label Name	Top 10 Customers
Argument Member	NAMES
Value Member	TotSales

- Click **Save** when done.

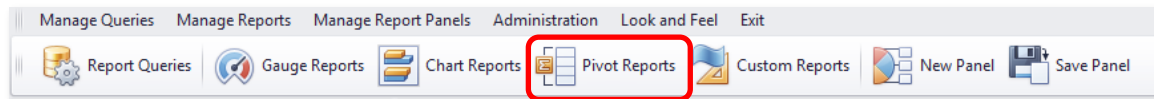
Working with Constants

You can define a Constant Value which will display in your charts. Enter the name and value in **Constant Label** and **Constant Value**.

In the example below we have defined a Constant called Target Level and its value is 120.



Pivot Reports



The Pivot Report option allows you to represent the same data in various ways by creating different views of the same query.

Dashboard

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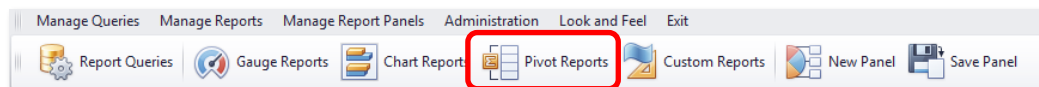
Management Tools

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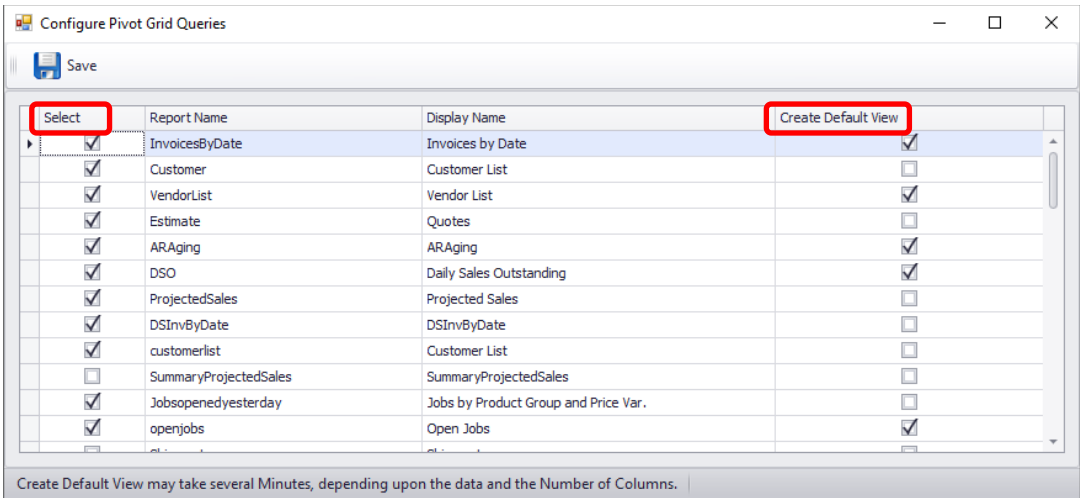
Creating a Pivot Report

To create a pivot report

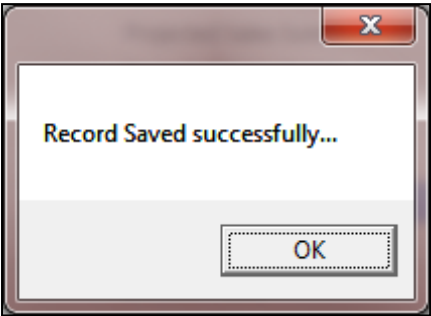
1. Select the **Pivot Reports** icon.



2. Select an existing report from the list and check both the **Select** and **Create Default View**.



Click **Save**.

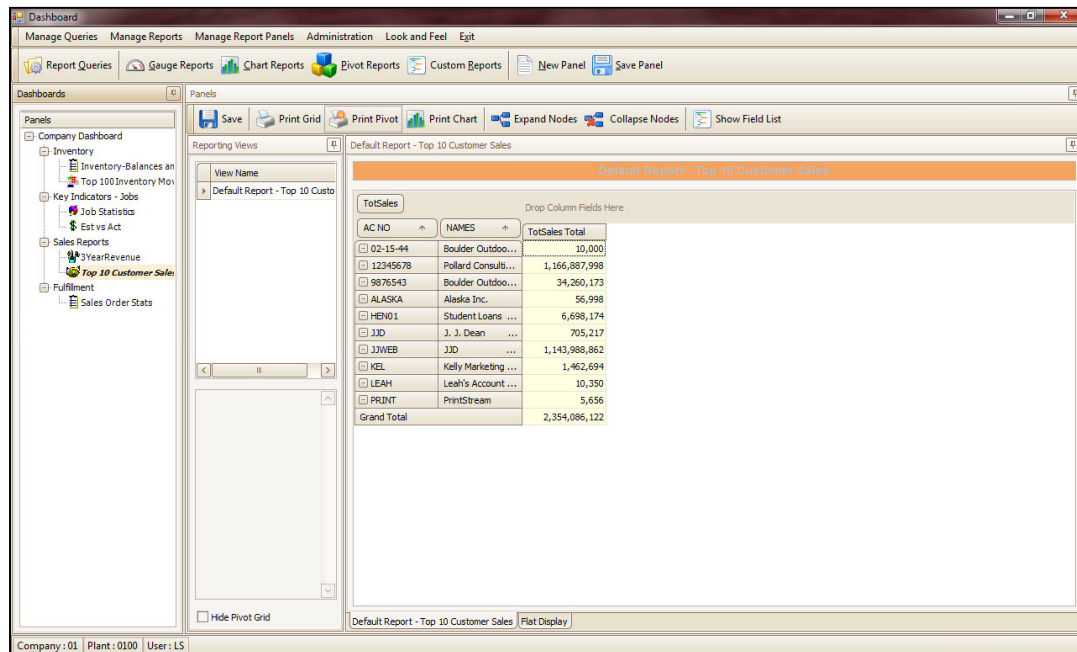


The Pivot Report is now available to use when creating Panels.

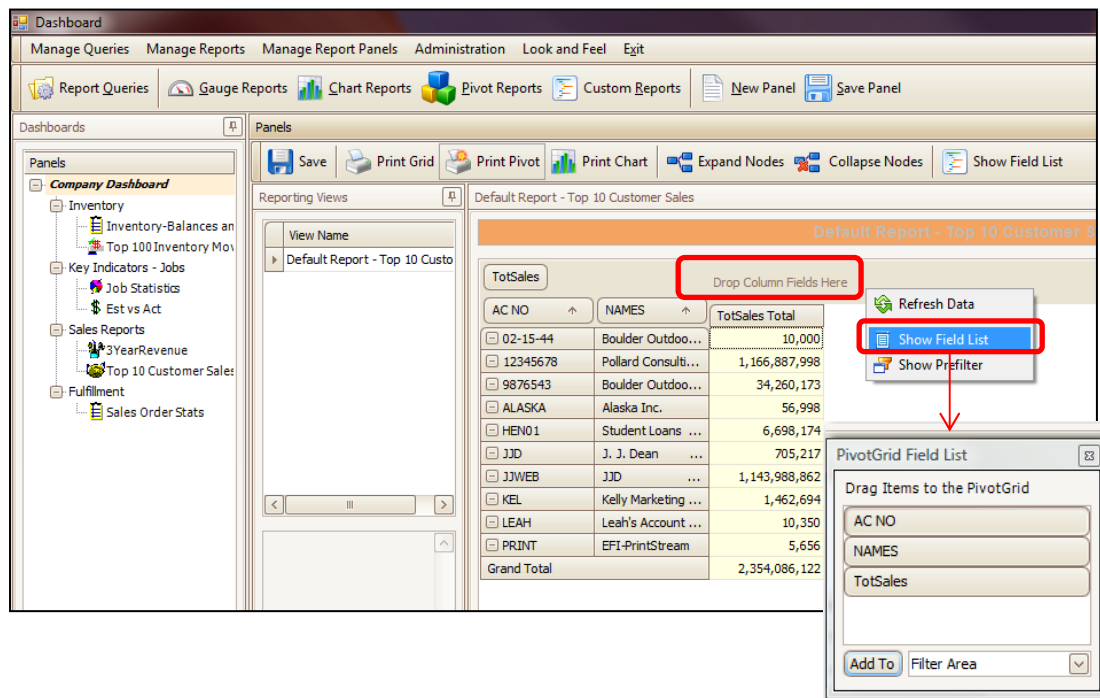
3. Add the newly created Pivot Report to the menu. See the section “*Adding a Panel or Pivot Report to the Menu*” of this document for details on how to accomplish this.

Note Creating default Pivot Report Views may take several minutes depending upon the data and number of columns.

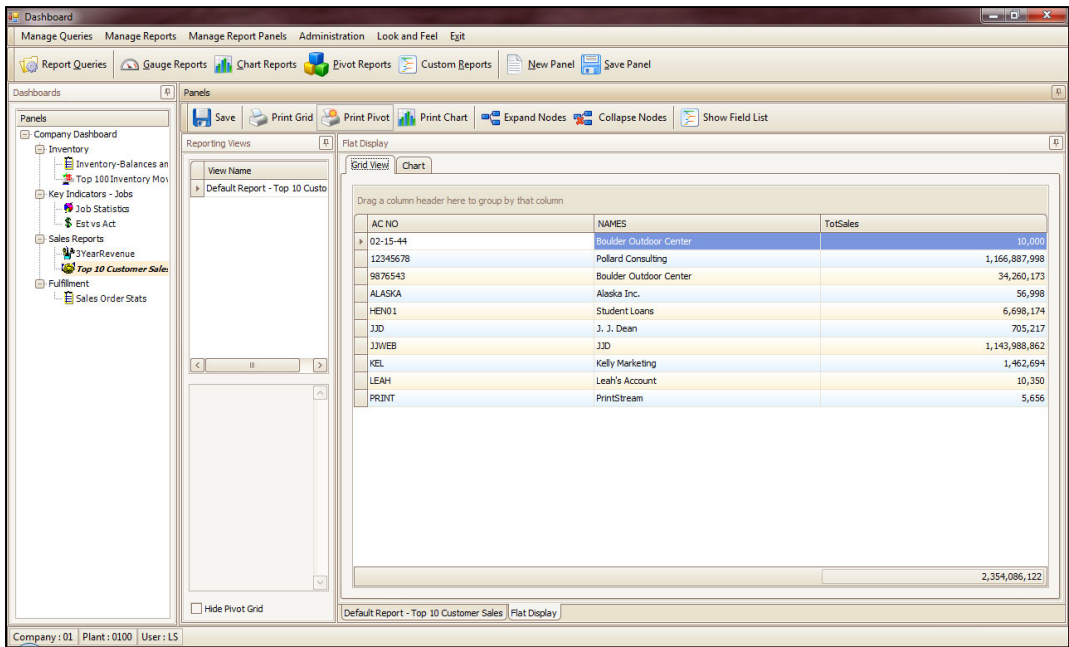
4. After the Pivot Report has been added to a panel it will open in the default view.



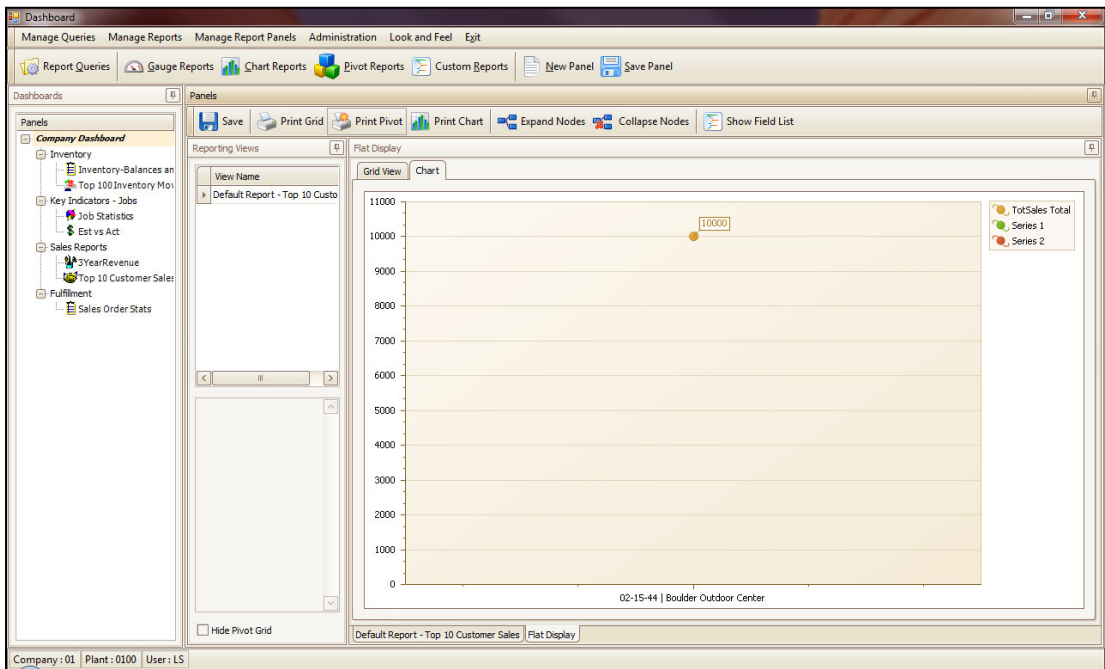
5. Click in the area that says "Drop Column Fields Here" and then select **Show Field List**.



- 6. From the list of available fields (determined by the query) click and drag those fields that you wish to have as part of your Pivot Grid.
- 7. Select the **Flat Display** tab to change the view.



- 8. Select the **Chart** tab to view a chart view.



Working with the Data in the Pivot Report

Once you have the data you want, you can sort and group to a format as you need.

The screenshot shows the Dashboard application interface. The main window displays a Pivot Report titled "Grouped - Top 10 Customer Sales". The report is organized into a table with columns: AC NO, NAMES, and TotSales Total. The data is grouped by customer, showing the top 10 customers by sales volume. The report is displayed in a "Flat Display" mode.

AC NO	NAMES	TotSales Total
02-15-44	Boulder Outdoo...	10,000
12345678	Pollard Consulti...	1,166,887,998
9876543	Boulder Outdoo...	34,260,173
ALASKA	Alaska Inc.	56,998
HEN01	Student Loans ...	6,698,174
JJD	J. J. Dean ...	705,217
JJWEB	JJD ...	1,143,988,862
KEL	Kelly Marketing ...	1,462,694
LEAH	Leah's Account ...	10,350
PRINT	EFI-PrintStream	5,656
Grand Total		2,354,086,122

The interface includes a menu bar with options like "Manage Queries", "Manage Reports", "Administration", and "Look and Feel". A sidebar on the left shows a tree view of the dashboard structure, including "Company Dashboard", "Inventory", "Key Indicators - Jobs", "Sales Reports", and "Fulfillment". The bottom status bar shows "Company: 01", "Plant: 0100", and "User: LS".

Once the data is grouped and in the preferred order click **Save**. Provide a name for this view. Multiple views of the same pivot grid may be created and stored.

The screenshot shows the "Pivot Grid Metadata" dialog box. It contains fields for "View Name" (set to "Grouped - Top 10 Customer Sales"), "Name on Report", and "Notes". Below these fields is a "Security Settings" section with a table for "Company and Plants". At the bottom, there is a "Permitted Roles" section with a table listing roles and their selection status.

Company Code	Company	Plant Code	Plant Name
01	Streamline Solution...	0100	01 San Rafael
02	PrintStream ...	0200	02 Utah USA

Role Name	Selected
Accounting	<input type="checkbox"/>
Administrators	<input checked="" type="checkbox"/>
Fulfillment	<input type="checkbox"/>
Unassigned Users	<input type="checkbox"/>

The data within the pivot grid can also be dynamically changed by using the **Parameters** section of the window and applying filters such as date ranges.

Grouped - Top 10 Customer Sales

TotSales

Drop Column Fields Here

Refresh Data

Show Field List

Show Prefilter

AC NO	NAMES	TotSales Total
02-15-44	Boulder Outdoo...	10,000
12345678	Pollard Consulti...	1,166,887,998
9876543	Boulder Outdoo...	34,260,173

PivotGrid Prefilter

And

[AC NO] Begins with <enter a value>

OK

Cancel

Apply

On the **Flat Display** tab there are two view options for Pivot Report data: Grid View and Chart View.

Grid View

The data in the grid may be sorted and re-arranged.

Dashboard

Manage Queries Manage Reports Manage Report Panels Administration Look and Feel Exit

Report Queries Gauge Reports Chart Reports Pivot Reports Custom Reports New Panel Save Panel

Panels

Company Dashboard

Inventory

Inventory-Balances an

Top 100 Inventory Mov

Key Indicators - Jobs

Job Statistics

Est vs Act

Sales Reports

3YearRevenue

Top 10 Customer Sales

Fulfillment

Sales Order Stats

Reporting Views

View Name

Grouped - Top 10 Customer St

Grid View Chart

Drag a column header here to group by that column

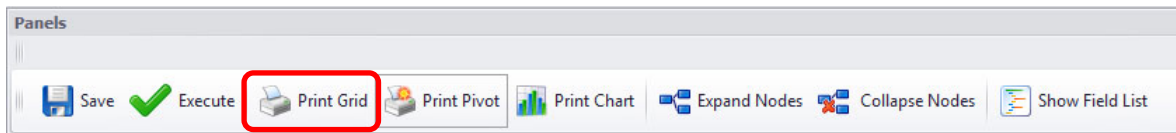
AC NO	NAMES	TotSales
02-15-44	Boulder Outdoor Center	10,000
12345678	Pollard Consulting	1,166,887,998
9876543	Boulder Outdoor Center	34,260,173
ALASKA	Alaska Inc.	56,998
HEN01	Student Loans	6,698,174
JJD	J. J. Dean	705,217
JJWEB	JJD	1,143,988,862
KEL	Kelly Marketing	1,462,694
LEAH	Leah's Account	10,350
PRINT	EFI-PrintStream	5,656
		2,354,086,122

Hide Pivot Grid

Grouped - Top 10 Customer Sales Flat Display

Company : 01 Plant : 0100 User : LS

You can print the Grid View.



You can also export the data.

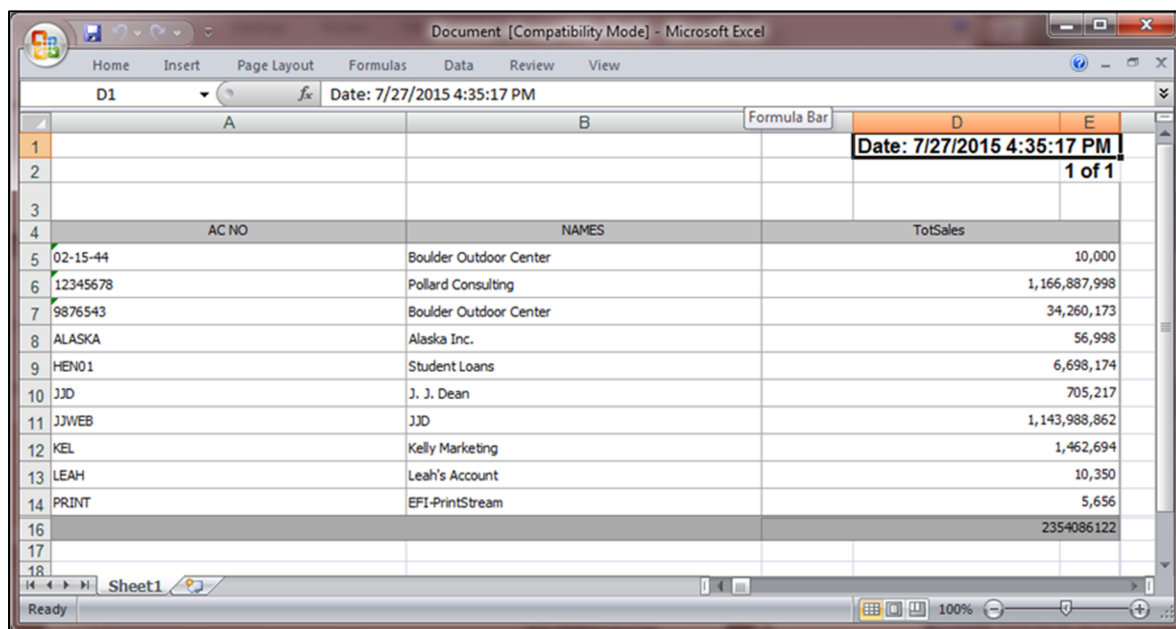
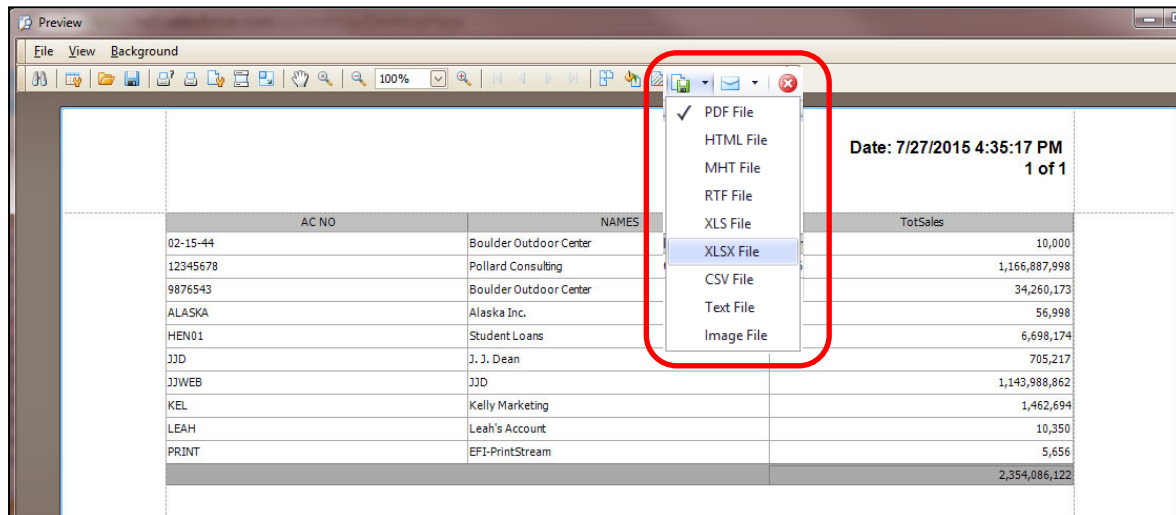
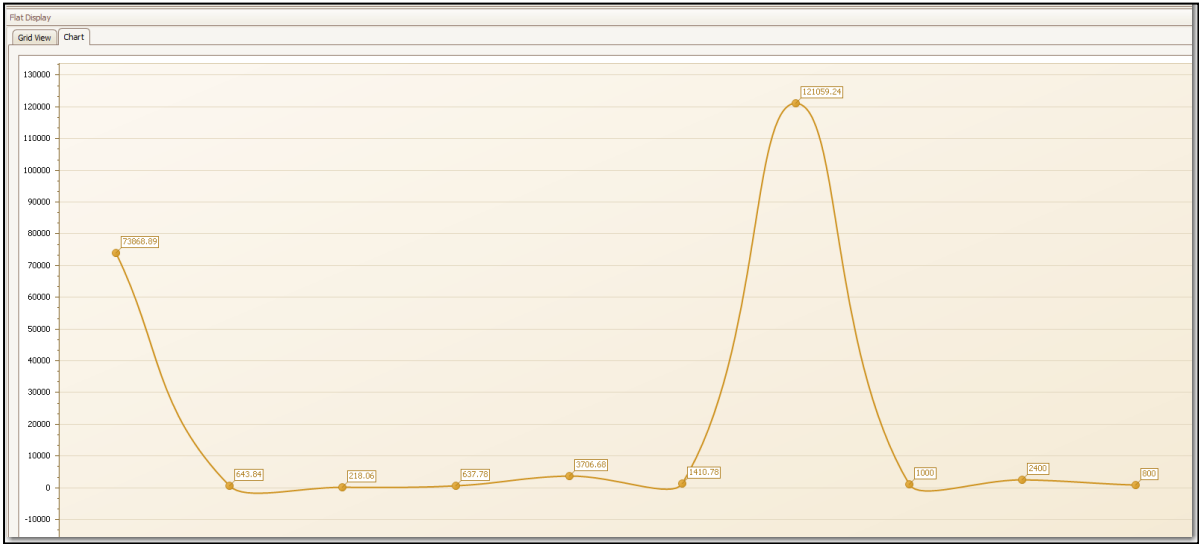
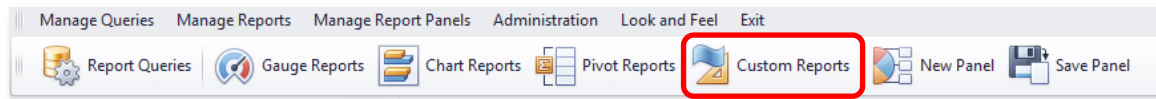


Chart View

You can also view the data in chart form.



Custom Reports

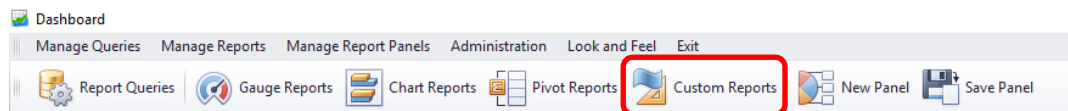


You can create customized reports in Dashboard using DevExpress which is a report designer tool. Use DevExpress to drag and drop data onto a design page.

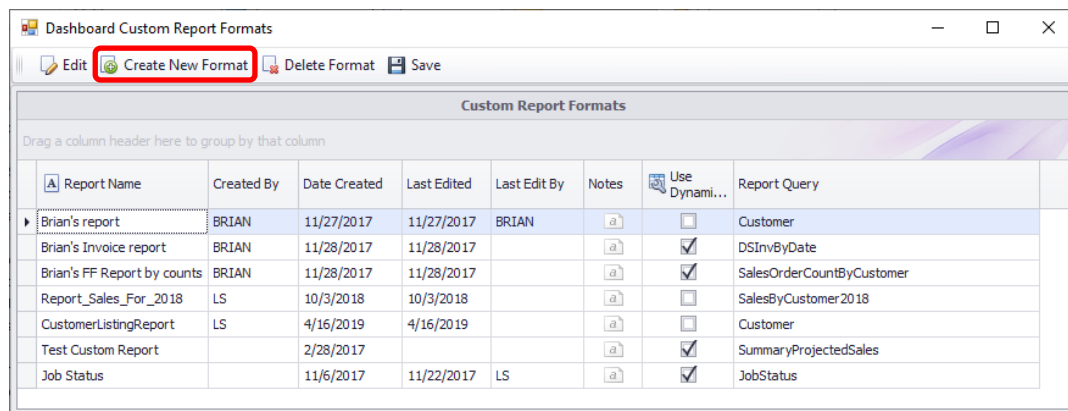
Defining a Custom Report

To define a custom report

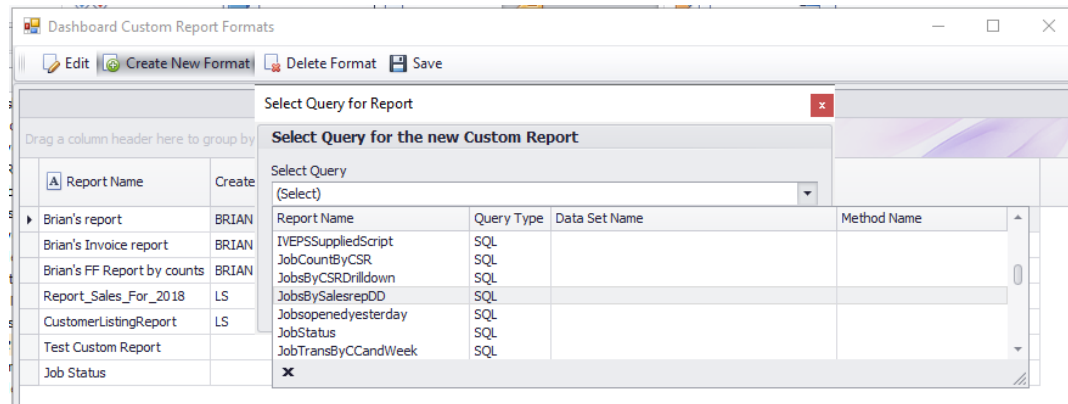
1. Select the **Custom Reports** icon.



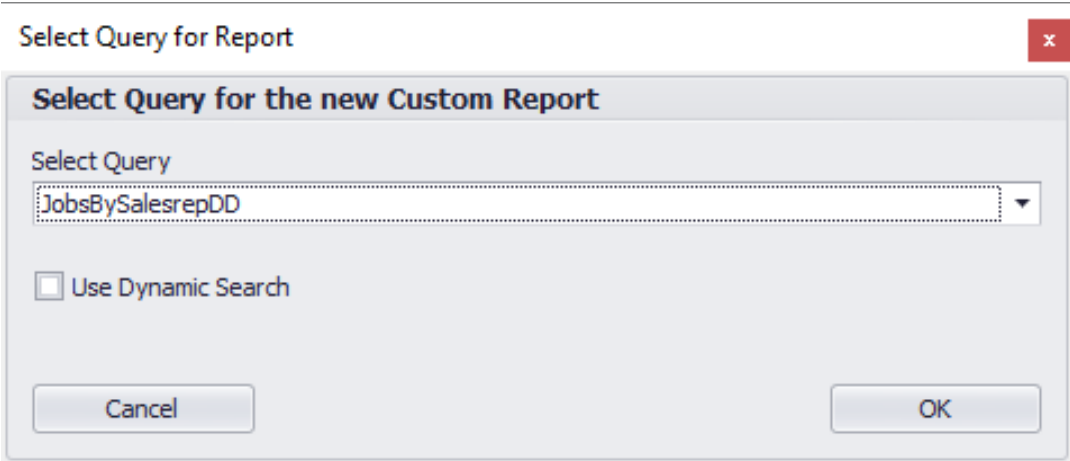
2. In the Custom Reports Formats setup window, click **Create New Format**.



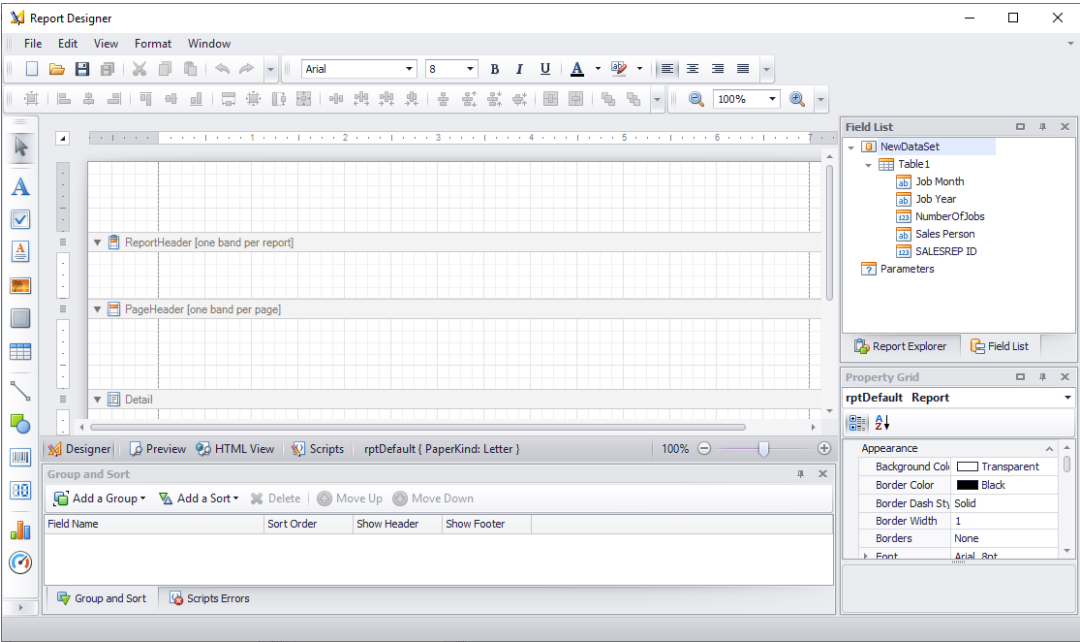
3. Select the SQL to be associated with this new report.



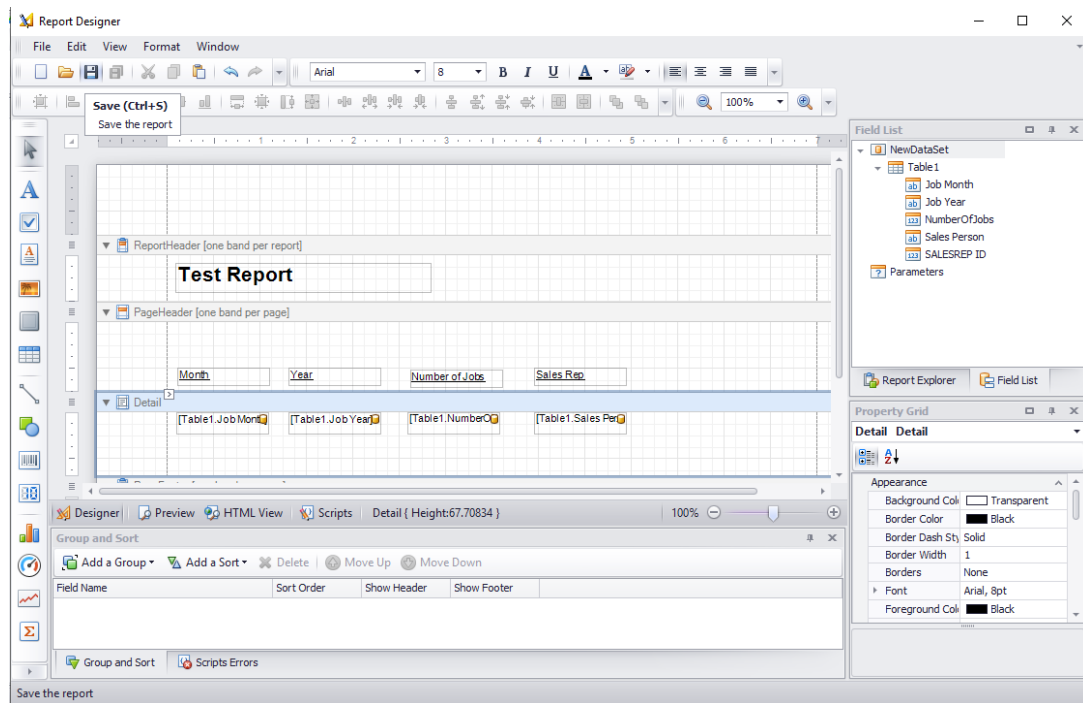
4. Select OK.



5. The DevExpress report tool opens.



6. Drag fields onto the Report Format area and click **Save**.



7. In **Report Name** enter a descriptive name for this report and select **Submit**.

Report Name

Report Name

☐ Set Default

Notes

Save To Disk

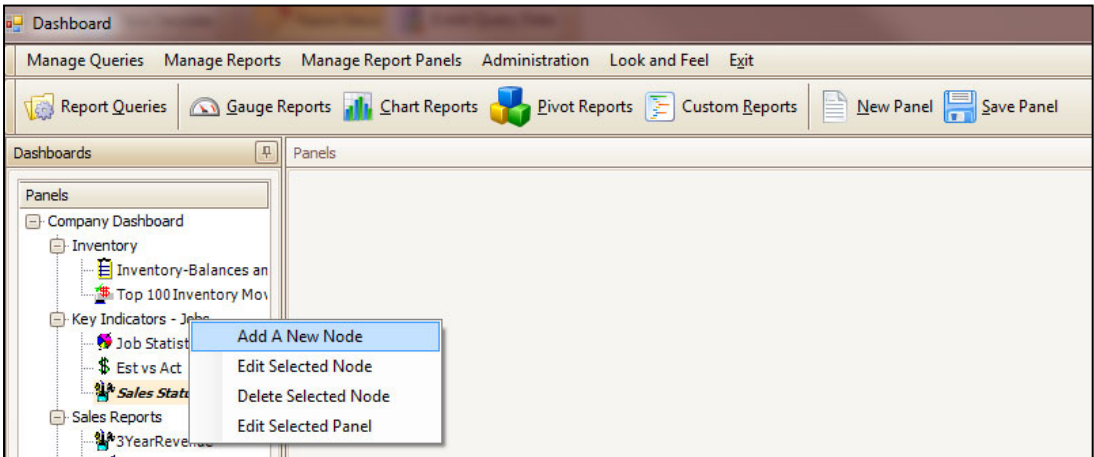
Submit

Cancel

8. The new report displays in the grid below.

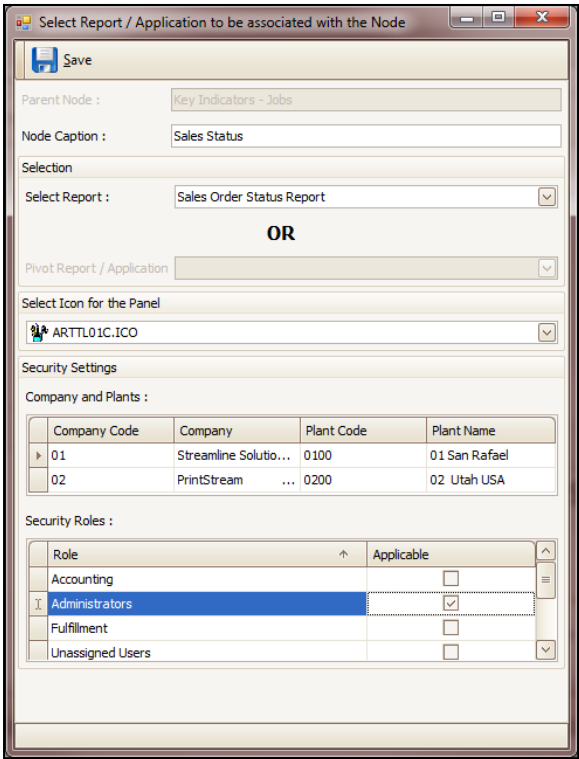
Custom Report Formats								
Drag a column header here to group by that column								
Report Name	Created By	Date Created	Last Edited	Last Edit By	Notes	Use Dynamic Search	Report Query	
Brian's Invoice report	BRIAN	11/28/2017	11/28/2017		a	<input checked="" type="checkbox"/>	DSInvByDate	
Brian's FF Report by counts	BRIAN	11/28/2017	11/28/2017		a	<input checked="" type="checkbox"/>	SalesOrderCountByCustomer	
Report_Sales_For_2018	LS	10/3/2018	10/3/2018		a	<input type="checkbox"/>	SalesByCustomer2018	
CustomerListingReport	LS	4/16/2019	4/16/2019		a	<input type="checkbox"/>	Customer	
Test Report	LS	9/5/2019	9/5/2019		a	<input type="checkbox"/>	JobsBySalesrepDD	
Test Custom Report		2/28/2017			a	<input checked="" type="checkbox"/>	SummaryProjectedSales	
Job Status		11/6/2017	11/22/2017	LS	a	<input checked="" type="checkbox"/>	JobStatus	

9. Once the report is saved, you must add a link to the custom report in Dashboard. In the Dashboard tree, right-click a node and click **Add a New Node**.

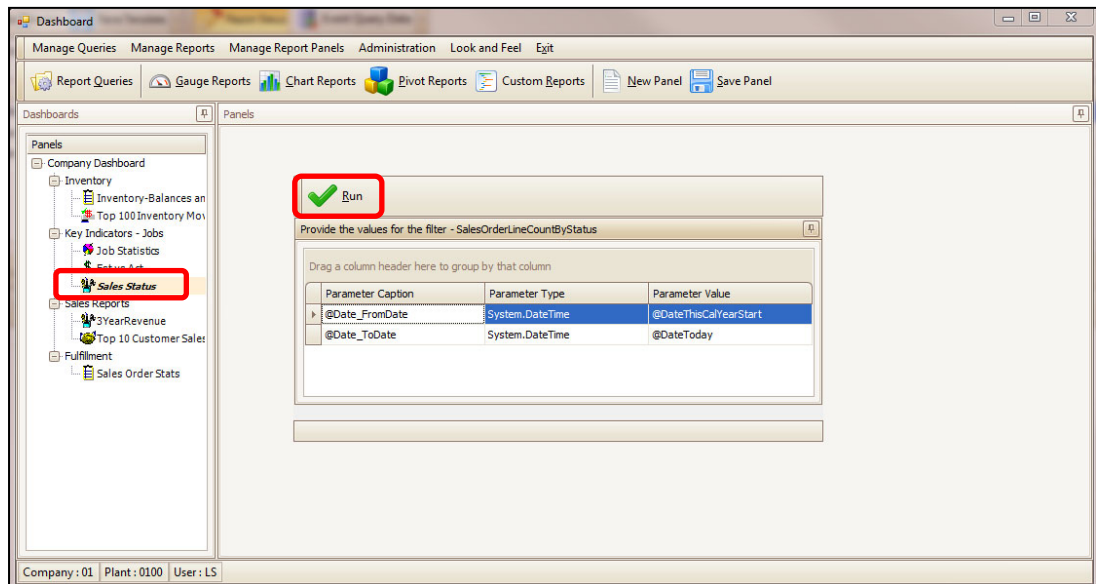


10. Enter a descriptive **Node Caption** and then use the **Select Report** drop-down to choose the report. The report type will be Custom Report.

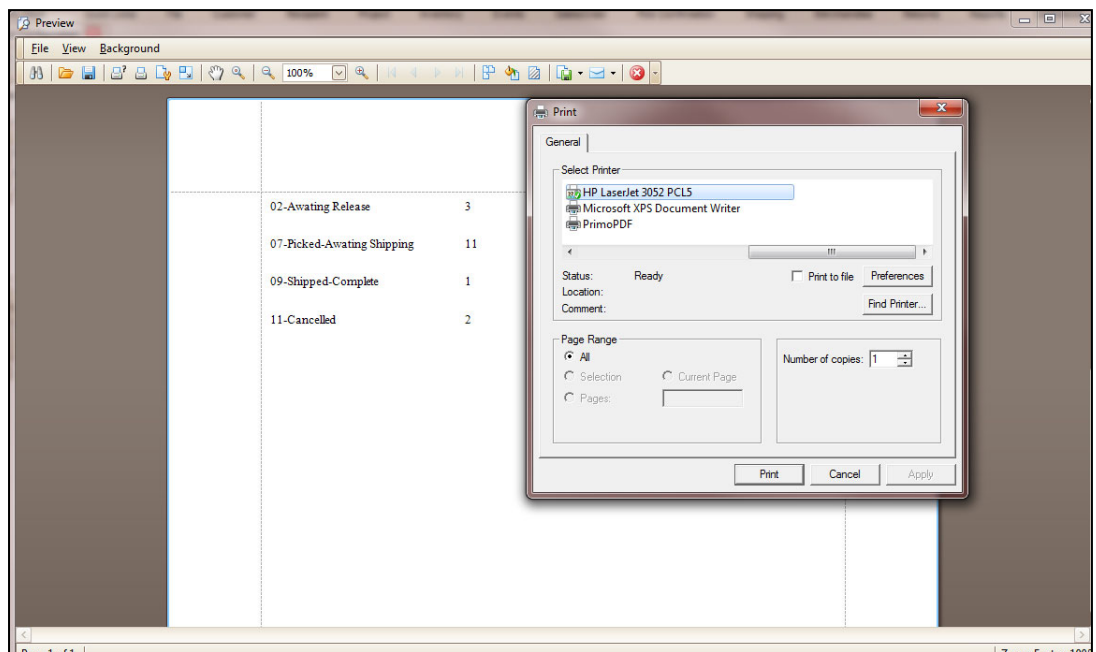
Then choose which Company and Plant(s) will have access to this custom report and choose specific Security Roles as well. Click **Save**.



11. From the report tree, select the custom report and click **Run**.



The report will display and you have the option to print.

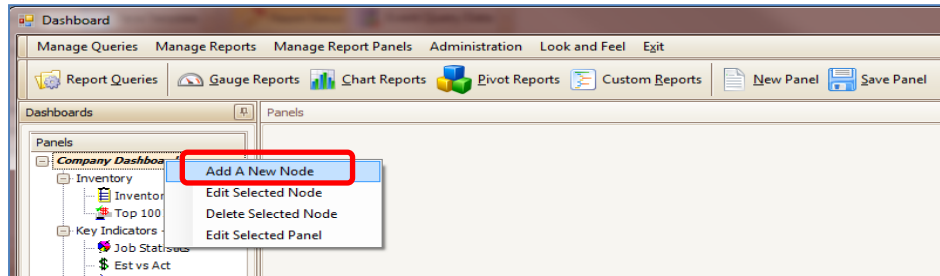


Defining the Menu Structure

The menu structure within the Dashboard is completely customizable. Use this feature to further organize your reports.

To add nodes to the menu tree

1. In the Panels menu tree, right-click anywhere and then select **Add A New Node**.



2. In the Node setup window, enter the following:

Node Caption: Enter a descriptive name for the new node which will display in the menu tree.

Company and Plants: Select the companies and plants to which you want to give access to this node.

Security Roles: Select specific user roles to which you want to give access.

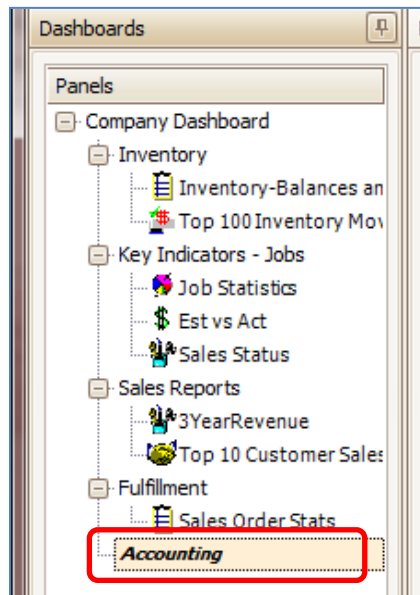
Select Report At the node level you can associate a report but it is not required. See the section below *Adding a Panel*.

The screenshot shows the 'Select Report / Application to be associated with the Node' dialog box. The 'Parent Node' is 'Company Dashboard'. The 'Node Caption' is 'Accounting'. The 'Selection' section has 'Select Report' and 'Pivot Report / Application' dropdowns. The 'Security Settings' section includes a table for 'Company and Plants' and a table for 'Security Roles'.

Company Code	Company	Plant Code	Plant Name
01	Streamline Solutions	0100	01 San Rafael
02	PrintStream	0200	02 Utah USA

Role	Applicable
Accounting	<input checked="" type="checkbox"/>
Administrators	<input checked="" type="checkbox"/>
Fulfillment	<input type="checkbox"/>
Unassigned Users	<input type="checkbox"/>

3. Click **Save**. The new Node is now available.



To further organize your reports, you can add sub-menu items or nodes and associate them to specific reports.

To add sub-nodes

1. From the menu, right-click an existing node and select **Add A New Node**.
2. In the new node window, enter the name and security options for the node.
3. Click **Save**.

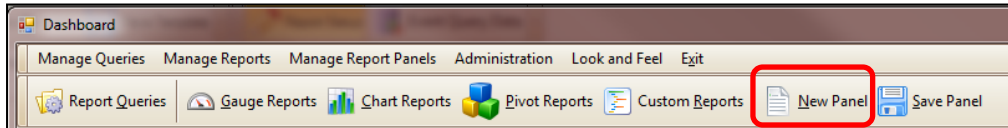
Note Repeat the above steps to create as many sub-levels as needed.

Creating a Panel

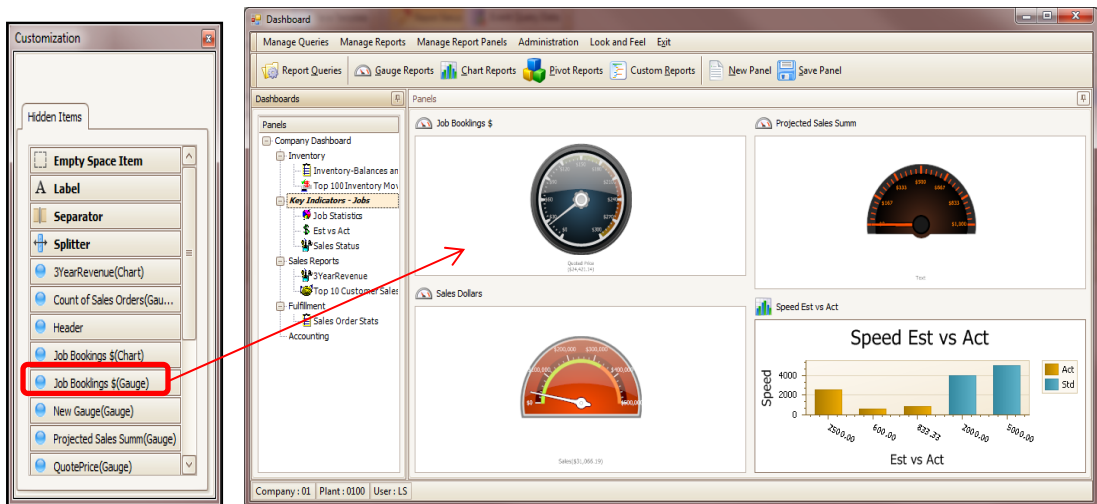
Panels consist of gauges and charts that can be viewed in one display.

To create a panel

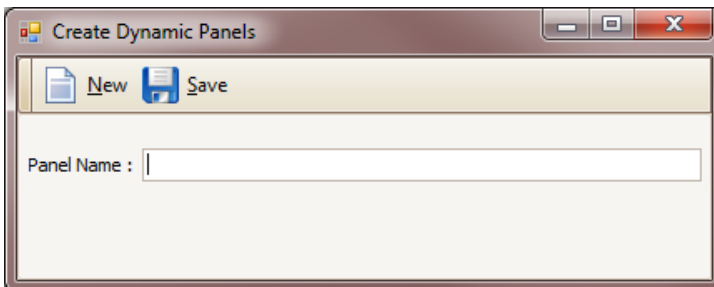
1. Select the **New Panel** icon.



2. In the Customization window, select the report (gauge, chart or pivot report) you want to add to the panel. Now drag the report to the panel. You can drag and drop several reports to the same panel.



3. Select the **Save Panel** icon and then enter a descriptive name for the new panel. Click **Save** once again to complete the process.

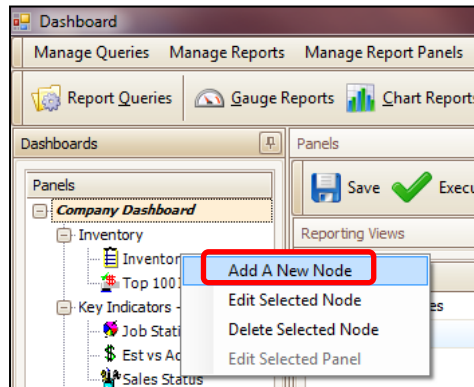


Adding a Panel or Pivot Report to the Menu

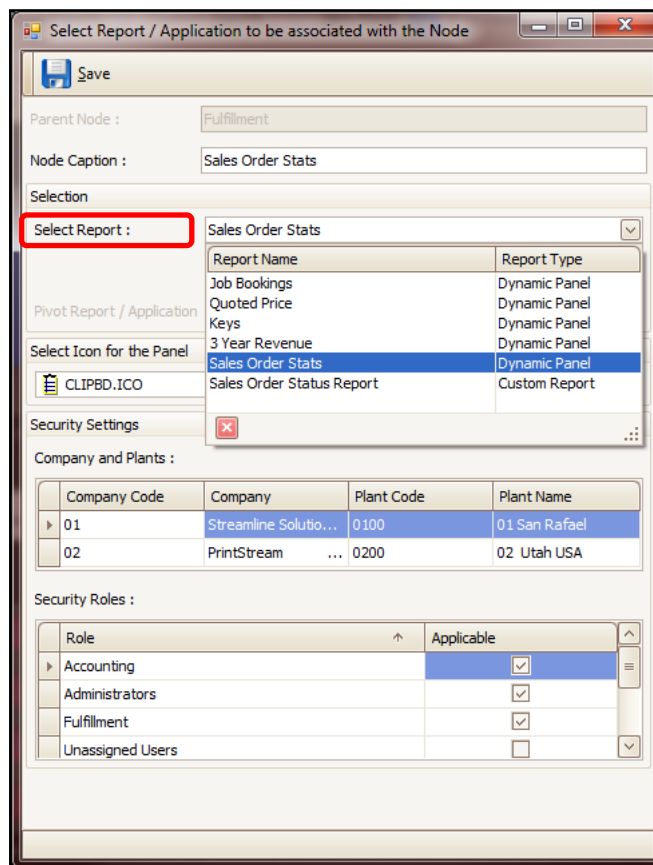
Once you create panels and pivot reports you can add them to the menu tree.

To add a panel or pivot report to the menu

1. In the menu tree where you would like to add the report, right-click and select **Add A New Node**.



2. Select a report from the **Select Report** drop-down menu.



3. Select the **Company and Plants** along with the **Security Roles** to which you want to grant access to this report.
4. Click **Save** when finished. The panel will now display in the menu tree.