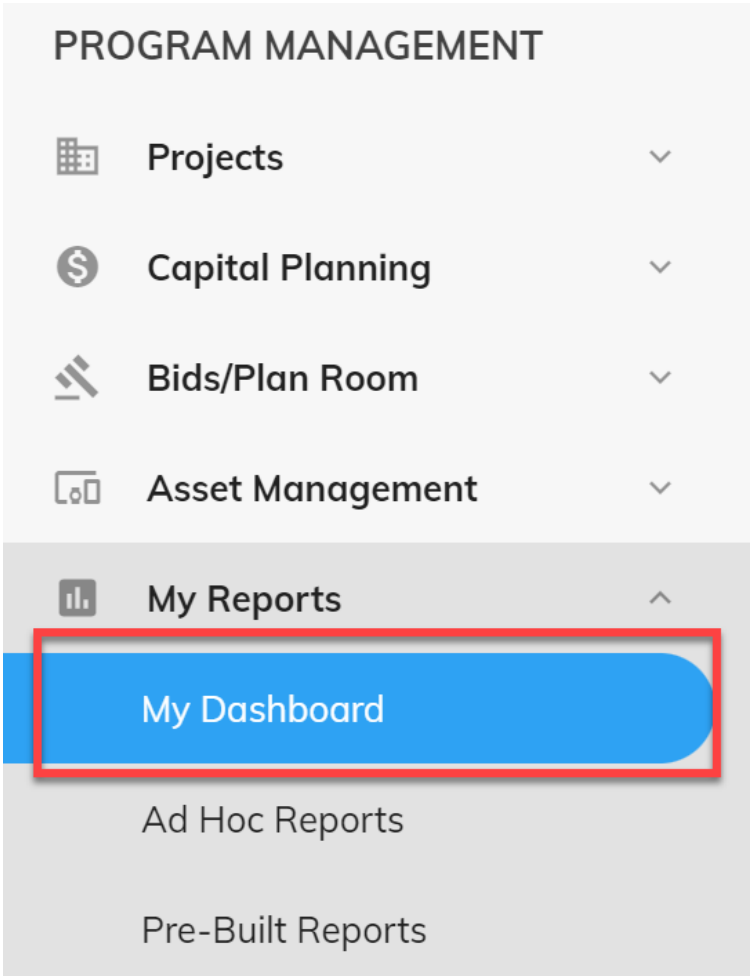
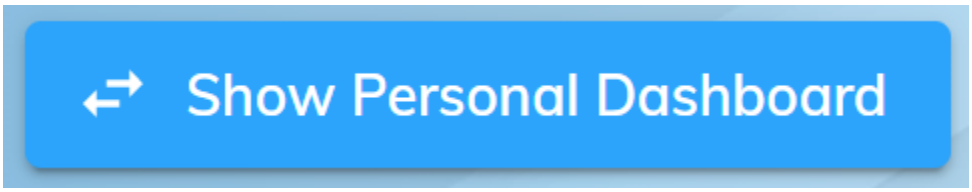
REPORTING DASHBOARD

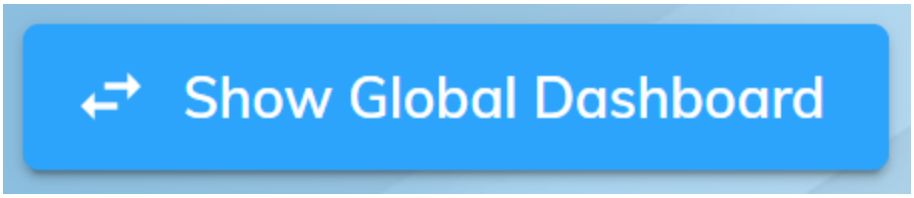
Viewing The Reporting Dashboard

1. From the navigation pane on the left side of the screen, select **My Reports** and then click on **My Dashboard.**



2. From the top right of the screen, click **Show Personal Dashboard** or **Show Global Dashboard** to toggle between the two.

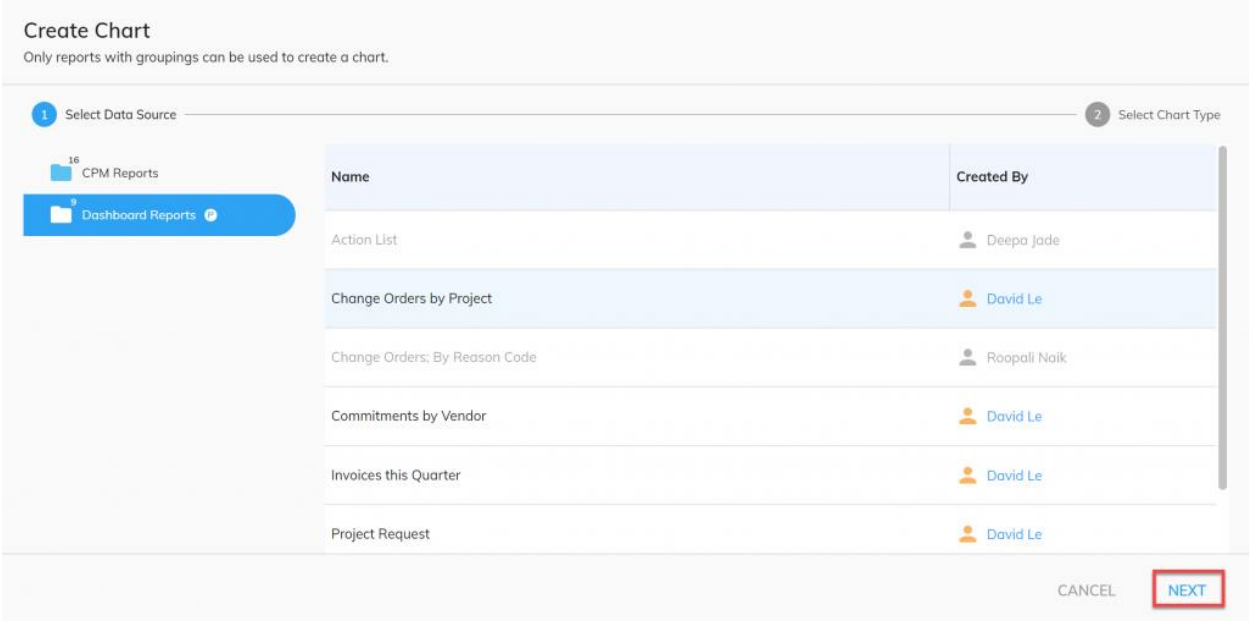




Editing Personal Dashboard

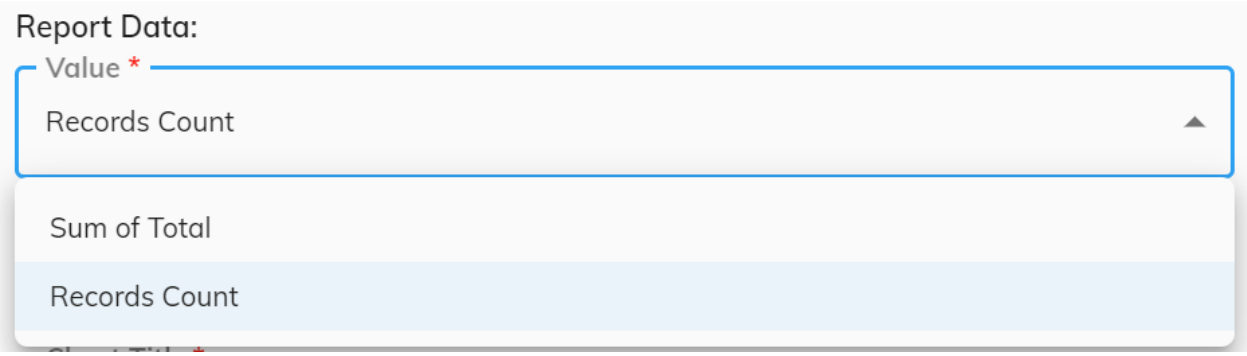
1. To make any changes to or to customize your personal dashboard, click **Edit.**
2. To Add a new chart to the dashboard, click **+ Add.**

    a. Select a Data Source for the chart from the available reports (*Note: Reports that cannot be used to display data in chart form will be displayed in grey and cannot be selected*).



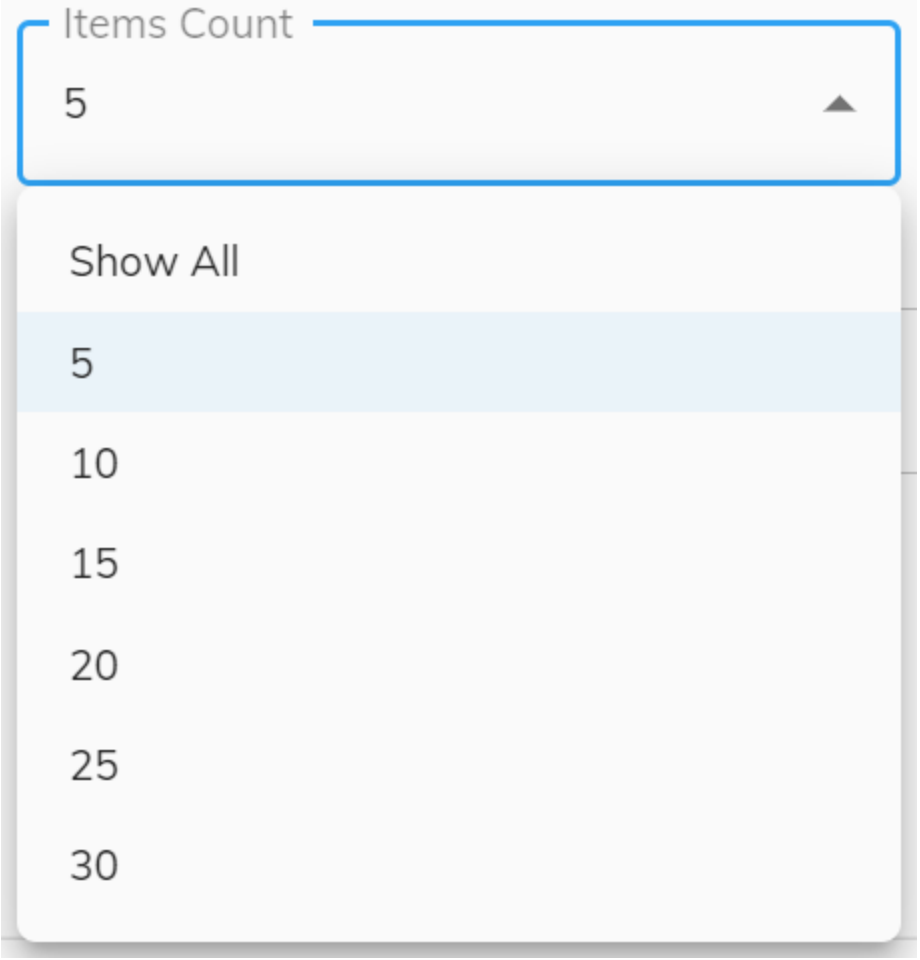
    b. When you have made your selection, click **Next**.
    c. Select a Chart Type that you prefer to portray your report data in (*Note: there are likely certain chart types that will display data more suitably than others*).

d. Select Data Value type. The options could include: Average, Sum or Records Count of any of the qualifying grouping criteria, based on the data from your selected report.

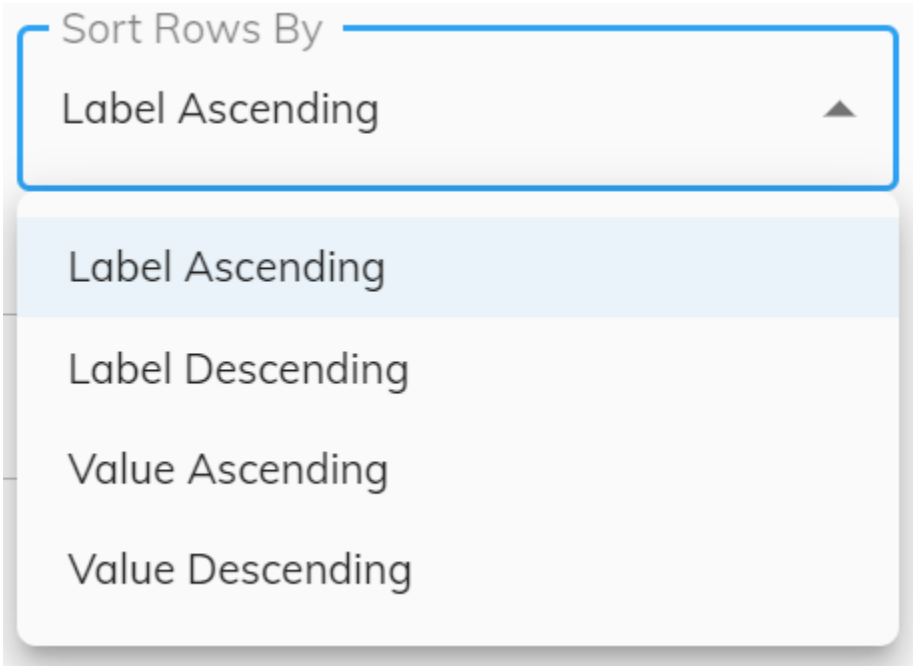


e. Group and Chart Title will be auto filled based on the selected report; however, you may change/edit these fields if the option is available (*Note: you may not be able to change "Group" if the report does not provide relevant grouping data for any other group to be presented in the chart*).

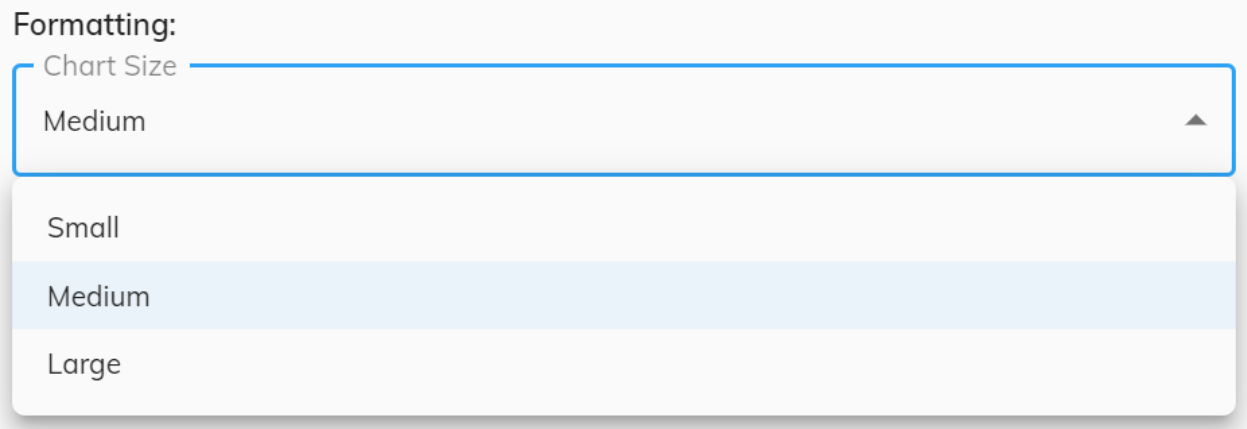
f. You may want to present a limited number of items in the chart instead of all possible items; if applicable, click **Items Count** to make a selection.



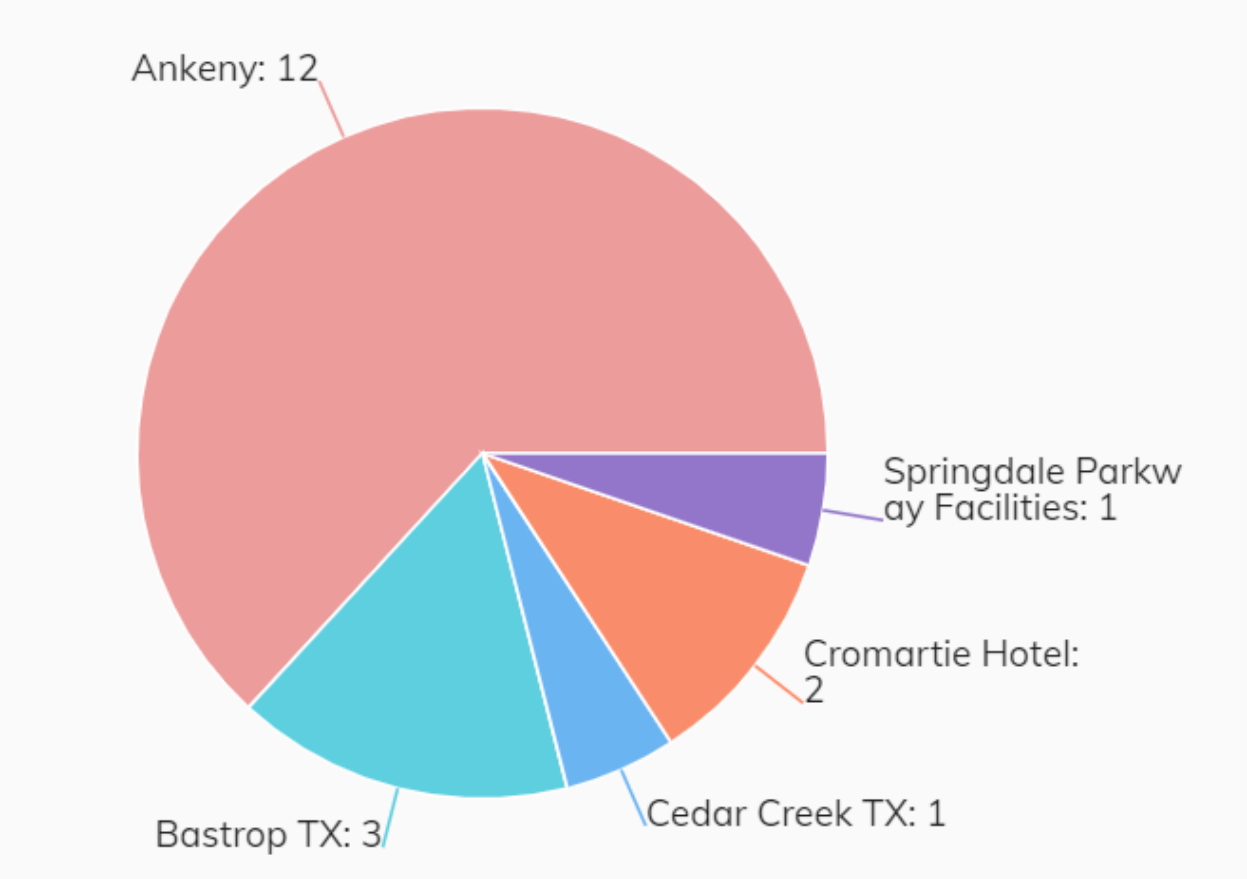
g. Click **Sort Rows By** to select the sorting logic.



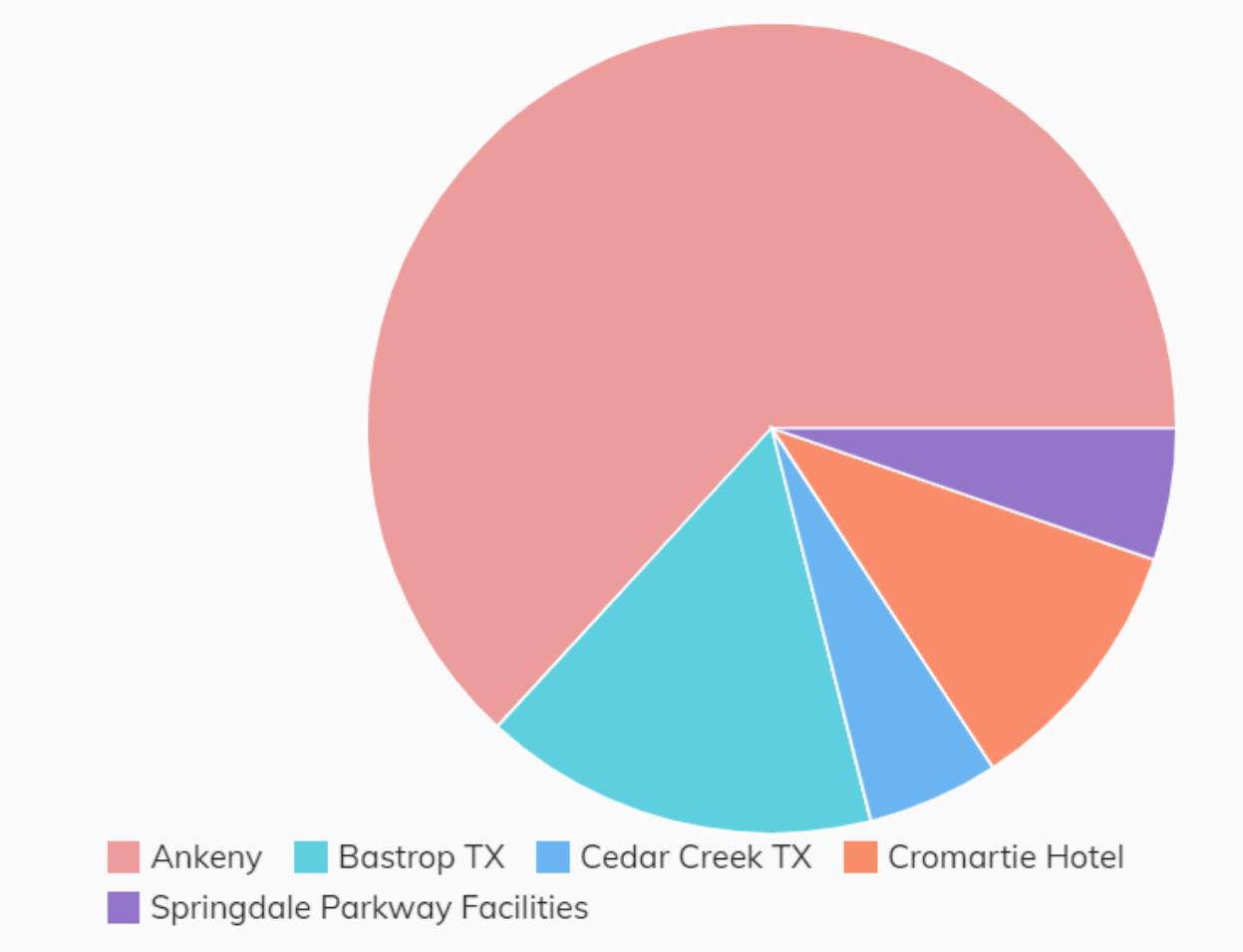
h. Select size of the chart to be placed on your dashboard:



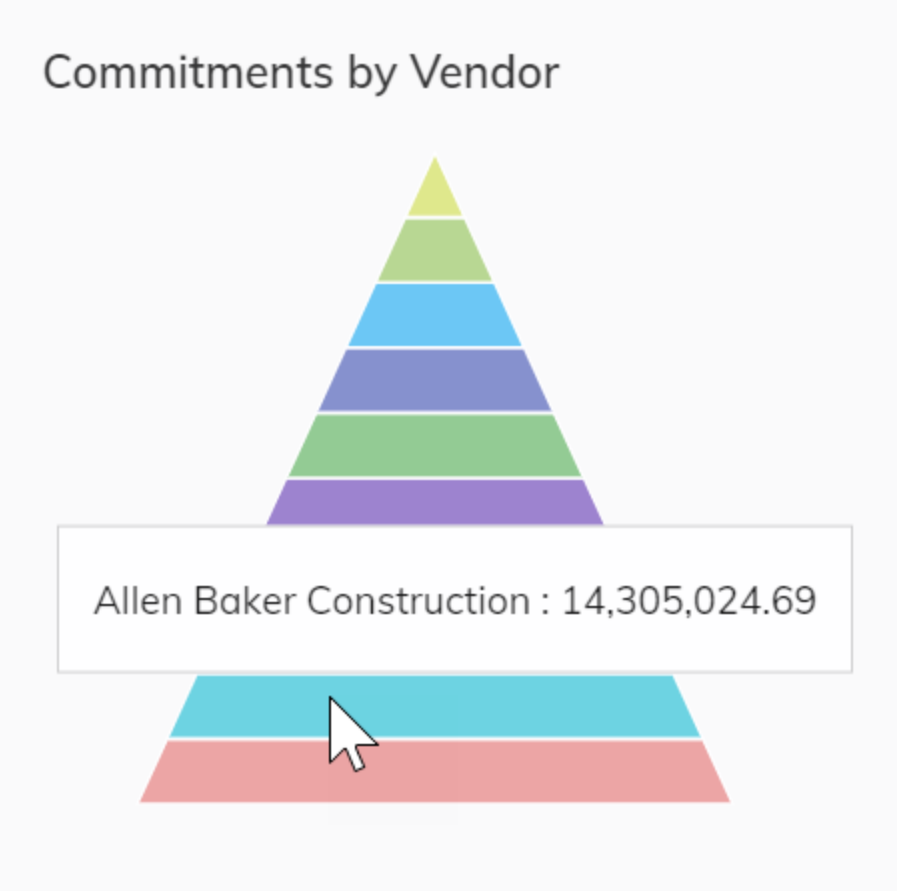
i. To show labels on the chart, check **Show Labels.**



j. To show legend under the chart, check **Show Legend.**



k. Note that chart item information is visible on the charts when you hover over item.



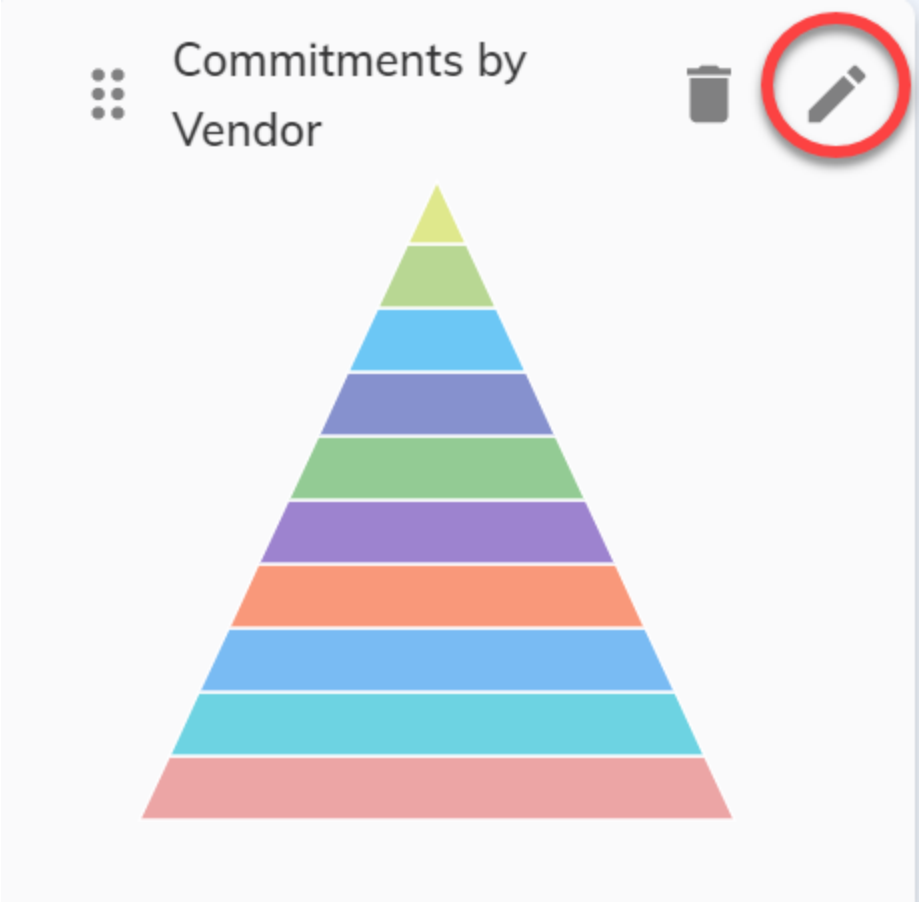
2.
    l. Click **Apply** to add this chart to the dashboard.
3. To change the position of charts on your personal dashboard:

    l. To move a chart, click on the set of dots on left of the chart name and drag the chart to where you want to place it.
4. Click **Save.**

Note: You may also be able to edit the Global Dashboard in the same manner if you have the appropriate rights to do so. But it's important to consider that this will change the Global Dashboard view for all other reporting users in the system, and therefore it should be done with due consultation and/or care.

Editing Charts

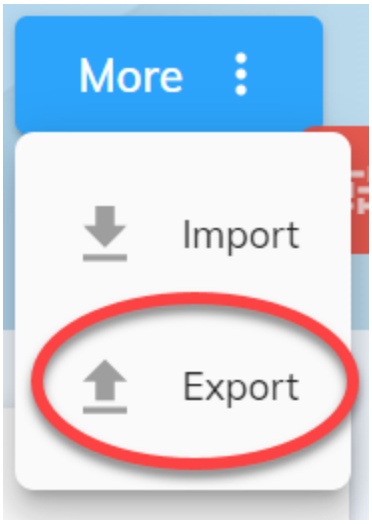
1. Click on the pencil icon to edit a chart.



2. Make the changes you desire and click **Apply**.
3. Click **Save**.

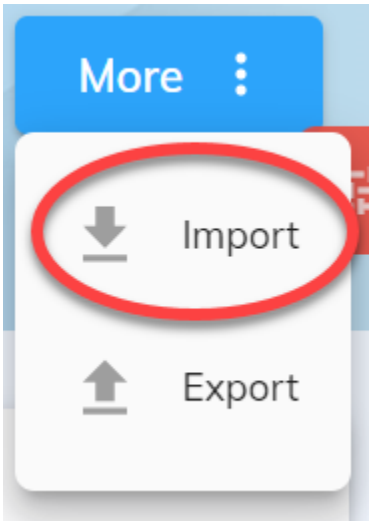
Importing And Exporting Dashboard Configurations

1. To export dashboard configuration:
    a. Click **More**, then click **Export**.



1.
    b. .xml file will be downloaded.
2. To import dashboard configuration:

    b. Click **More**, then click **Import**.



b. Select the .xml you intend to import and click **Open.**