

## Introduction to Dashboards

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The new Dashboard functionality in OSAS provides you with the ability to create charts and graphs that show business data at a glance, allowing you to more quickly assess various aspects of your business and facilitate decision-making.

**NOTE:** You must have BBJ version 16.21 or higher to use the dashboard functions. You must also be current on your Software Maintenance subscription to use the functionality.

**NOTE:** The dashboard functions require graphical rendering capabilities and therefore will not work on a text-based operating system such as console mode in Linux.

## Contents

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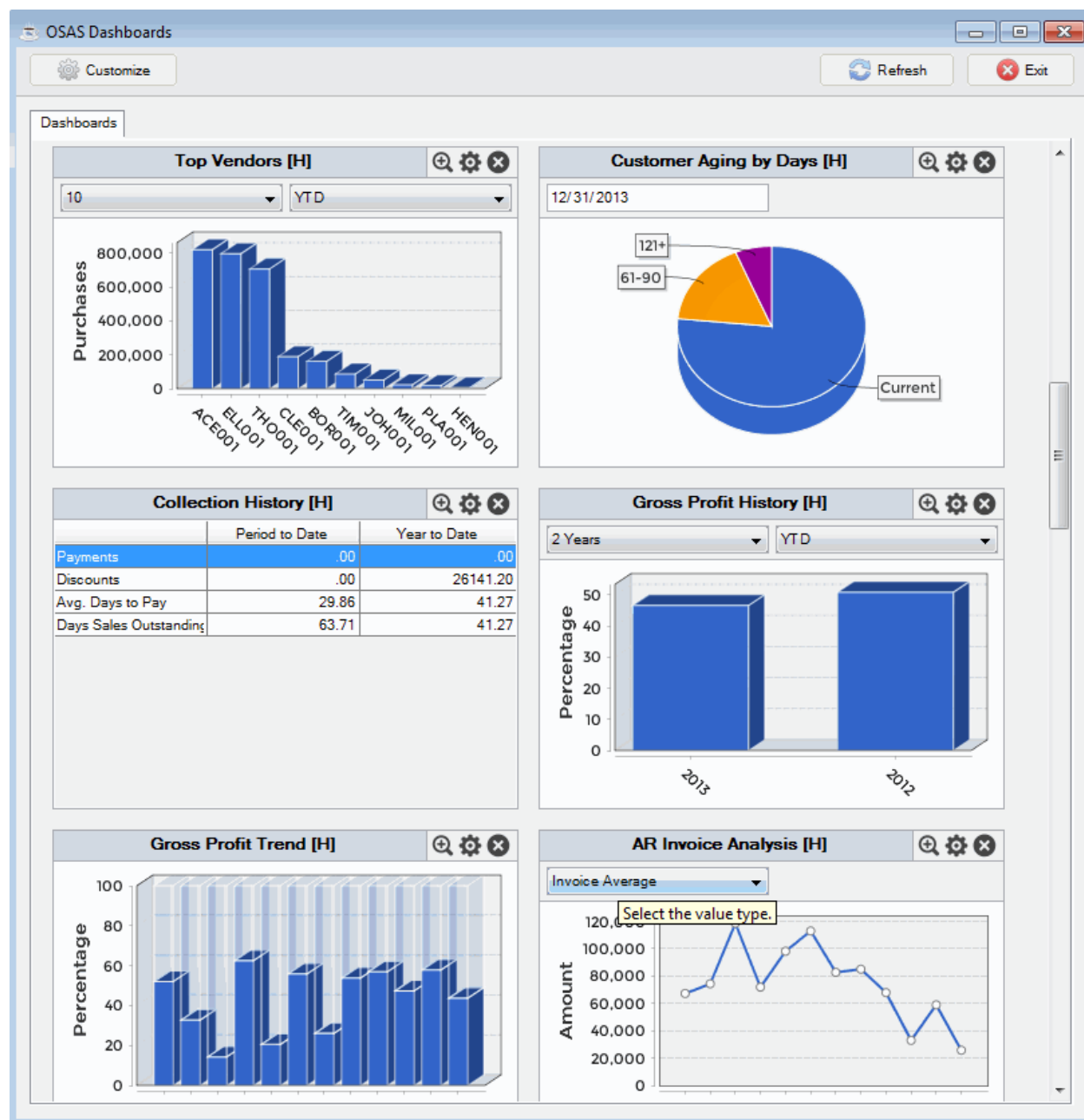
<b>Introduction to Dashboards.....</b>	<b>1</b>
<b>Dashboard .....</b>	<b>2</b>
Customize .....	3
Refresh .....	3
Exit .....	4
Chart Widgets .....	4
<b>Dashboard Setup .....</b>	<b>7</b>
<b>Dashboard Setup List.....</b>	<b>10</b>
<b>Dashboard Charts.....</b>	<b>11</b>
<b>Dashboard Charts List.....</b>	<b>13</b>

## Dashboard

The **Dashboard** function on the Resource Manager menu displays a selection of charts and graphs in a single window. Before a user can view a dashboard, you must use the **Dashboard Setup** function on the Installation and Configuration Dashboard Setup submenu.

Once you have selected the dashboard charts available for a user for the selected company, the user can use the Dashboard function to view and customize their dashboard.

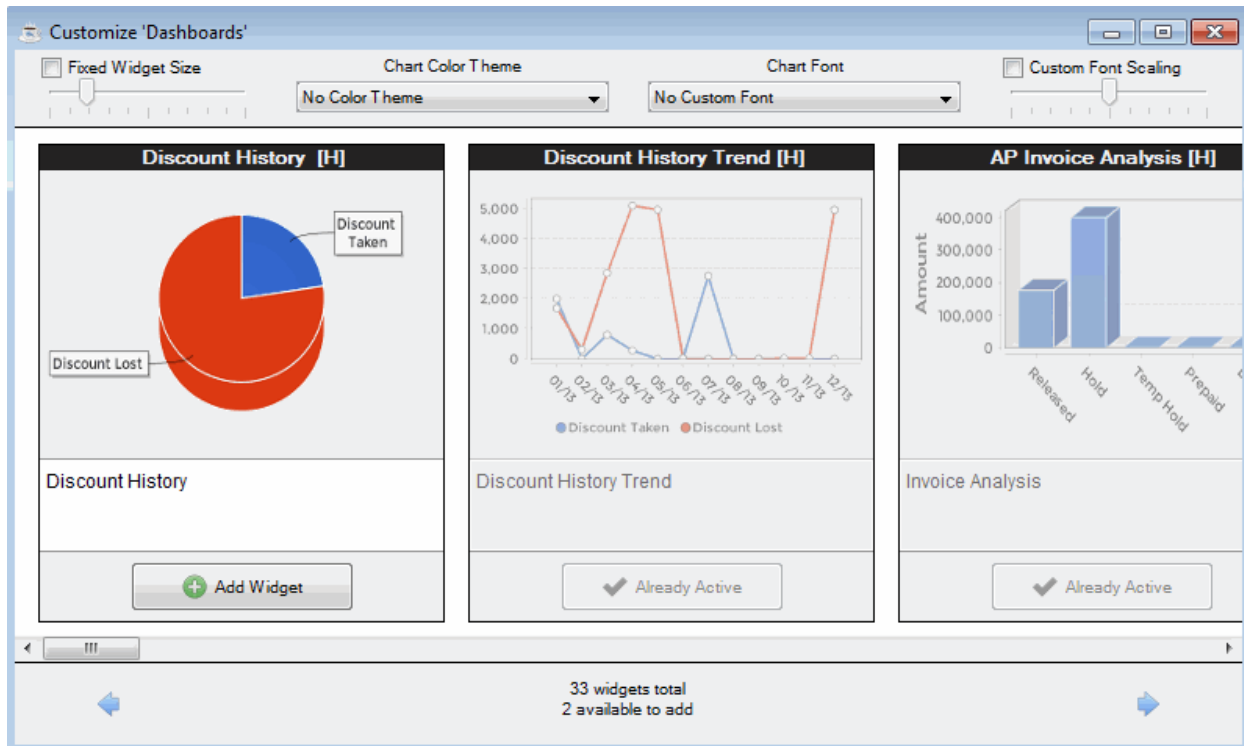
## Sample Dashboard



The OSAS Dashboards screen contains the charts and graphs you selected in the Dashboard Setup function. Each chart appears as a tile in the window.

## Customize

Use the **Customize** button to open the **Customize 'Dashboards'** screen and change the display and appearance of the charts and graphs on the dashboard.



- Mark the **Fixed Widget Size** check box and adjust the slider control to change the size of the chart widgets. Selecting a fixed widget size prevents the charts from resizing according to the window size.
- Select a **Chart Color Theme** from the drop-down list to change the color scheme of the charts.
- Select a **Chart Font** from the drop-down list to change the font on the charts.
- Mark the **Custom Font Scaling** check box and adjust the slider control to change the size of the chart font. Selecting a custom font scale prevents the font from resizing according to the chart size.
- If you have disabled a chart on the dashboard, that is, clicked the "X" to remove it from view, you can use the arrows at the bottom of the Customize window to scroll through the dashboard charts and add the widget back to the visible charts by clicking the **Add Widget** button.
- Close the **Customize 'Dashboards'** window to save your changes and return to the dashboard.

## Refresh

The dashboard charts are snapshots of the data that exists when you initially open the dashboard. To refresh the data in the charts, click the **Refresh** button.

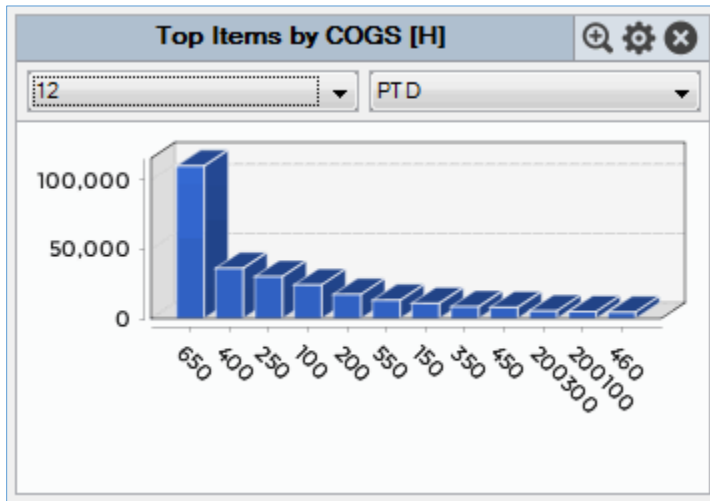
## Exit

To close the dashboard, click the **Exit** button.

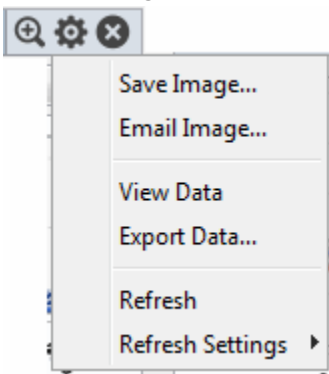
## Chart Widgets

Each chart widget contains a graph or chart displaying select business data in an easy-to-read visual format.

- You can change select parameters for the report using the drop-down lists above the actual chart.

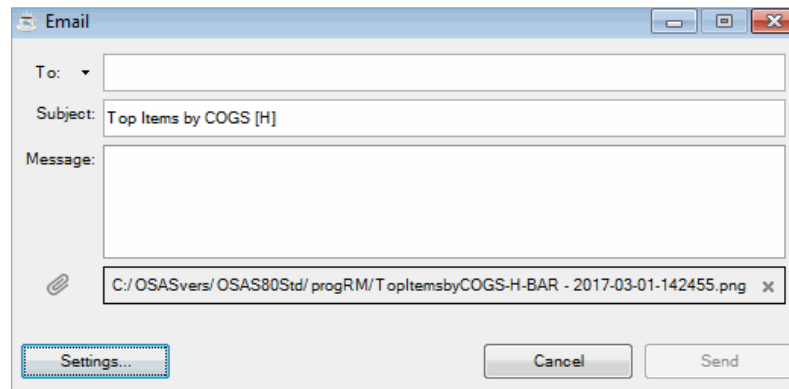


- Use the magnifying glass icon to zoom in on the report.
- Click on the gear icon to see the settings menu for the chart.

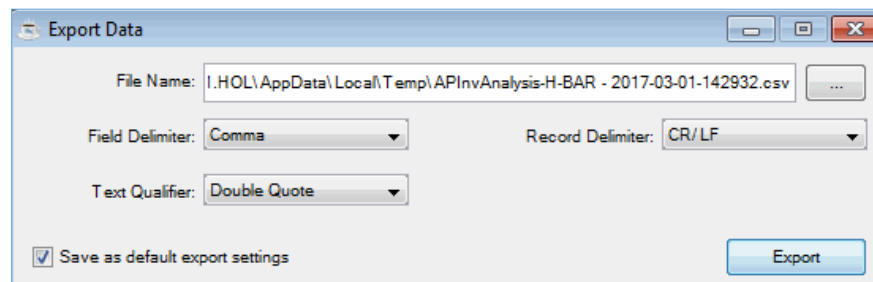


- Use the **Save Image...** command to save the chart as an image file (.png).

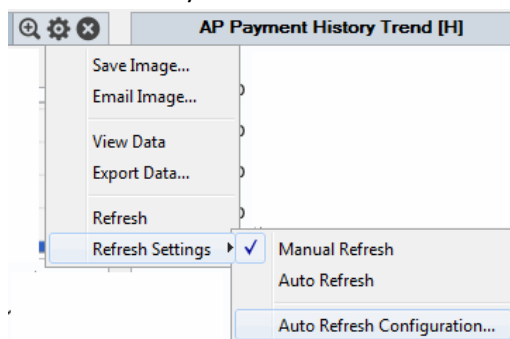
- Use the **Email Image...** command to send the chart as an attachment via email. Use the **Settings** button to check your email settings.



- Use the **View Data** command to view the data reflected in the chart in an Excel worksheet.
- Use the **Export Data...** command to export the data in the chart as a delimited file.



- Use the **Refresh** command to refresh the data in the chart.
- To automatically refresh the data in the chart, select the **Refresh Settings** command.

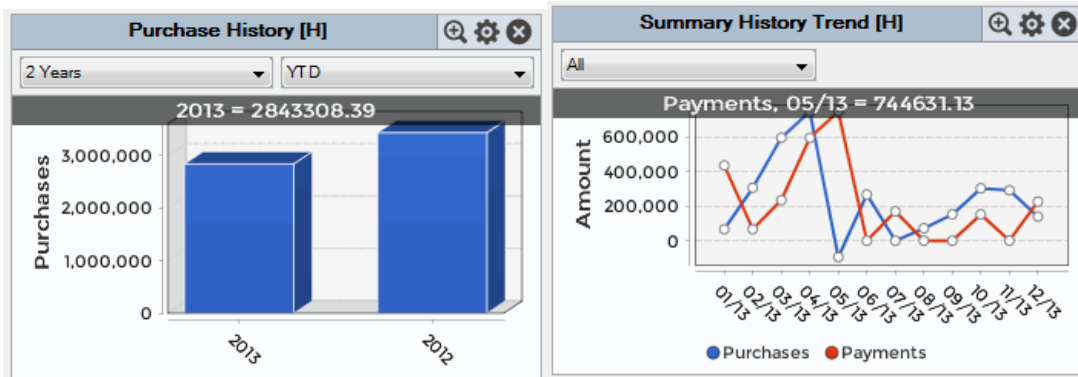


Set the Auto Refresh rate using the **Auto Refresh Configuration...** command. Once you set the automatic refresh rate, the Auto Refresh mode will be active.

- To remove the chart widget from the display, use the **Exit** button in the upper right corner of the widget. This will hide the chart widget, but it will not remove the chart from the dashboard. Use the Dashboard Settings function to remove the chart from the dashboard.

You can show the widget again by using the **Customize** button and adding the widget to the dashboard.

- To view the actual data behind a data point or chart entry, you can click on a graph data point or chart entry such as a pie chart segment or bar chart bar. The actual data number will appear at the top of the chart.



## Dashboard Setup

Use the **Dashboard Setup** function to control which dashboard charts to which each user may have access.

Dashboards are not available for users until you set them up using this function.

To set up a user's dashboard, select **Dashboard Setup** from the Installation and Configuration **Dashboard Setup** submenu. The Dashboard Setup screen appears.

**Dashboard Setup**

Commands Edit Modes Other Scroll Commands Help

User ID

**julie**

Company ID

Chart Description	Pie	Bar	Grid	Line	Area	PBar	SBar	SArea	Ring
AP Aging	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Discount History	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Discount History Trend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Invoice Analysis	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Payment History	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Payment History Trend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Purchase History	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Summary History Trend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP Top Vendors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AR Aging Chart	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AR Collection History	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AR Collection Trend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

\* = Custom

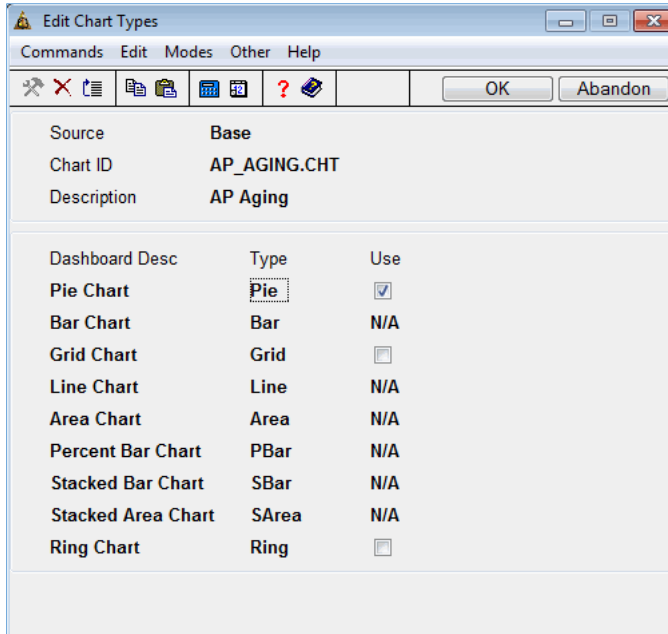
Entry ( 0001 of 0036 )

Enter = edit usage All valid types None View Go to

Header cCompany id Create dashboard Reset Default Usage

To set up a dashboard:

1. Select a **User ID**. Each user will have his or her own dashboard setup.
2. Select a **Company ID**. You can determine the dashboard data that will be available to this user differently for each company.
3. On initial setup, all of the default charts will be selected. To deselect charts and/or change the type of chart used to display the information, select a **Chart Description**, then press **Enter**. The Edit Chart Types screen appears for that chart description.



Dashboard Desc	Type	Use
Pie Chart	Pie	<input checked="" type="checkbox"/>
Bar Chart	Bar	N/A
Grid Chart	Grid	<input type="checkbox"/>
Line Chart	Line	N/A
Area Chart	Area	N/A
Percent Bar Chart	PBar	N/A
Stacked Bar Chart	SBar	N/A
Stacked Area Chart	SArea	N/A
Ring Chart	Ring	<input type="checkbox"/>

4. To include a chart type in the list of charts available to this user, select the check box (or enter **Y** in text mode); if not, clear the check box (or enter **N**).  
**Note:** Each chart type selected for a user is populated when the dashboard is displayed, even if the user removes the chart type from view on his or her dashboard, so selecting more charts than necessary will increase the time it takes to display the dashboard.
5. To save your choices and return to the Dashboard Setup Screen, use the **Proceed (PgDn)** command.
6. Repeat steps 4-6 for each additional chart you want to add or remove.
7. Once you have selected the types of charts you want to see on the dashboard, use the **Create dashboard** command to create the dashboard for the selected user.
8. Use the **Exit (F7)** command to return to the menu.



Use the commands to work with the charts listed:

- Press **Enter** to edit the chart type(s) used for the selected chart.
- Press **A** to mark all valid types for the selected chart.
- Press **N** to de-select all types for the selected chart.
- Press **V** to view a display-only version of the Edit Chart Types screen for the selected chart.
- Press **G** to go to a specific chart. This command is available only when there is more than one screen of charts.
- Press **H** to return to the **User ID** field to select a different user.
- Press **O** to select a different company ID.
- Press **C** to create the dashboard with the selected charts.
- Press **R** to reset the user and company to the default charts.

## Dashboard Setup List

The Dashboard Setup List shows information about the charts included on the dashboard for the selected user and company.

Sample List 1

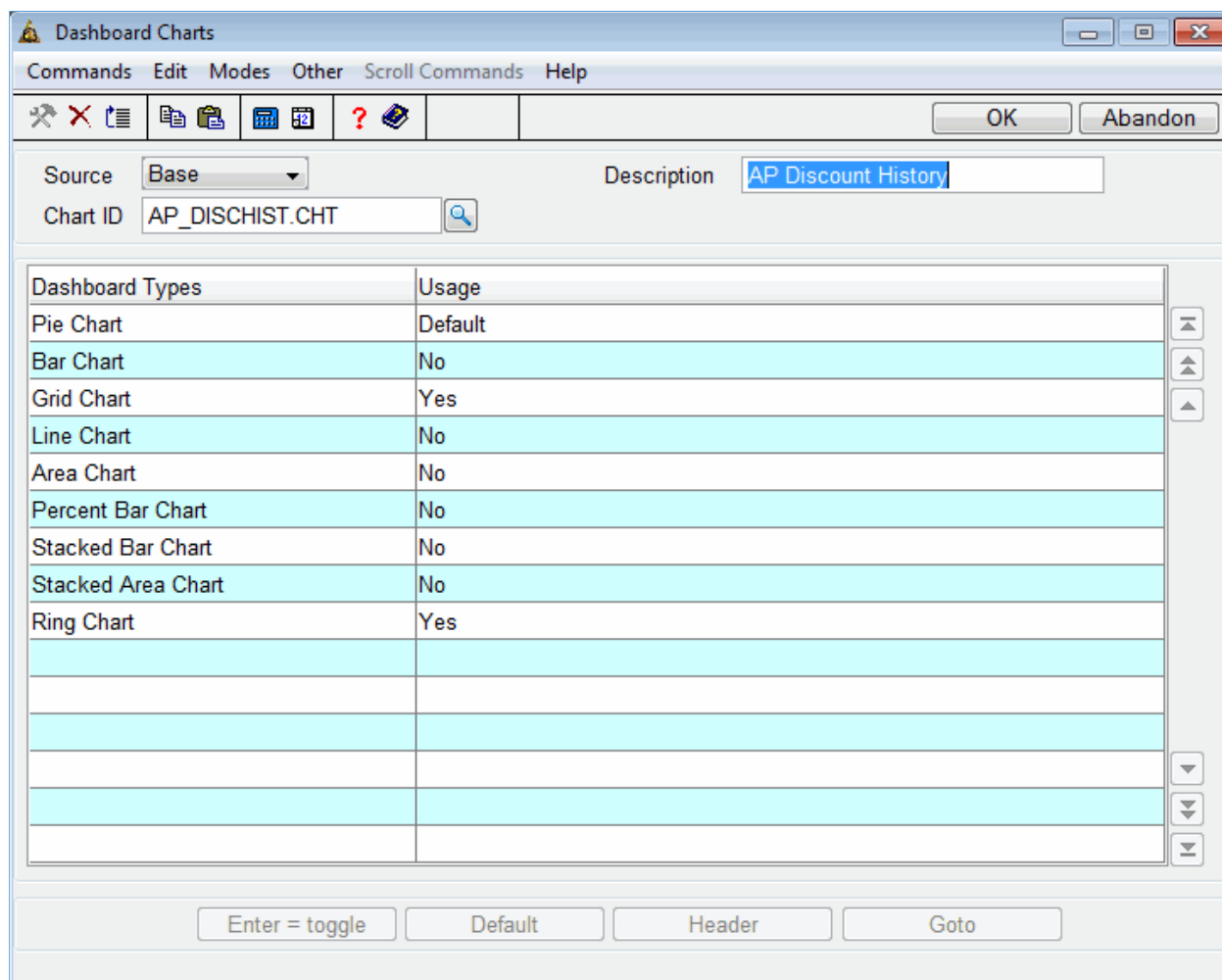
Builders Supply Dashboard Setup List By User ID										Page 1 of 2	
Company	User ID	Name									
H	julie	julie									
			Usage								
	Source		Pie	Bar	Grid	Line	Area	PBar	SBar	SArea	Ring
	Chart Description										
	Base		Yes	No	No	No	No	No	No	No	No
	AP Aging										
	Base		Yes	No	No	No	No	No	No	No	No
	AP Discount History										
	Base		No	No	No	Yes	No	No	No	No	No
	AP Discount History Trend										
	Base		No	Yes	No	No	No	No	No	No	No
	AP Invoice Analysis										
	Base		Yes	No	No	No	No	No	No	No	No
	AP Payment History										
	Base		No	No	No	Yes	No	No	No	No	No
	AP Payment History Trend										
	Base		No	Yes	No	No	No	No	No	No	No
	AP Purchase History										
	Base		No	No	No	Yes	No	No	No	No	No
	AP Summary History Trend										
	Base		No	Yes	No	No	No	No	No	No	No
	AP Top Vendors										
	Base		Yes	No	No	No	No	No	No	No	No
	AR Aging Chart										
	Base		No	No	Yes	No	No	No	No	No	No
	AR Collection History										
	Base		No	No	No	No	No	No	No	No	No

## Dashboard Charts

Use the Dashboard Charts function to add custom charts to the dashboards or to make new chart types available for existing charts. This function allows you to make a particular type of chart selectable from the Dashboard Setup function.

**NOTE:** Adding a new chart or making a new chart type available for a chart requires customization (programming changes) to the dashboard components. Once the programming changes have been made, you'll use this function to enable the chart types for inclusion in the Dashboard Setup function.

Select **Dashboard Charts** from the System File Utilities menu. The Dashboard Charts screen appears.



Dashboard Types	Usage
Pie Chart	Default
Bar Chart	No
Grid Chart	Yes
Line Chart	No
Area Chart	No
Percent Bar Chart	No
Stacked Bar Chart	No
Stacked Area Chart	No
Ring Chart	Yes

1. Select a **Source**. Choose **Base** to use a chart ID included with OSAS, or **Custom** to use a custom chart.
2. Enter or select a **Chart ID**. Each chart ID will list the types of dashboard charts you can enable for use on a dashboard.

3. The **Description** field will display the description of the chart ID. You can edit the description, if necessary.
4. Use the **Proceed (OK)** command to work with the list of types.
5. Select a command:
  - Press **Enter** to toggle the **Usage** setting for the selected dashboard type. Select **Yes** to make the type available in the Dashboard Setup function. Select **No** to make the type unavailable in the Dashboard Setup function. Select **Default** to set the type to use by default in the Dashboard Setup function.
  - Press **D** to mark the selected dashboard type as **Default** in the **Usage** column.
  - Press **H** to return to the Source field to select a different user.
  - Press **G** to go to a specific dashboard type. This command is available only when there is more than one page of entries.
6. Once you are finished, use the **Exit (F7)** command to return to the menu.

## Dashboard Charts List

The Dashboard Charts List shows information about the charts available for use on the dashboard. The list includes the source for the chart, the available charts, and identifies the default chart type for each chart.

Sample List 2

Builders Supply Dashboard Charts List										Page 1 of 3
Source	Chart ID Description	Usage								
		Pie	Bar	Grid	Line	Area	PBar	SBar	SArea	Ring
Base	AP_AGING.CHT AP Aging	Dflt	No	Yes	No	No	No	No	No	Yes
Base	AP_DISCHIST.CHT AP Discount History	Dflt	No	Yes	No	No	No	No	No	Yes
Base	AP_DISCHISTTRND.CHT AP Discount History Trend	No	No	No	Dflt	No	No	Yes	No	No
Base	AP_INVANALYSIS.CHT AP Invoice Analysis	No	Dflt	Yes	No	No	No	No	No	No
Base	AP_PAYHIST.CHT AP Payment History	Dflt	Yes	Yes	No	No	No	No	No	Yes
Base	AP_PAYHISTTRND.CHT AP Payment History Trend	No	No	No	Dflt	No	No	No	No	No
Base	AP_PURCHHIST.CHT AP Purchase History	No	Dflt	Yes	No	No	No	No	No	No
Base	AP_SUMHISTTRND.CHT AP Summary History Trend	No	No	No	Dflt	No	No	No	No	No
Base	AP_TOPVEND.CHT AP Top Vendors	No	Dflt	Yes	No	No	No	No	No	No
Base	AR_AGING.CHT AR Aging Chart	Dflt	No	Yes	No	No	No	No	No	Yes