

# Dashboards & reports

## Front page and dashboards

### Introduction

This Quick guide will show you how to setup the dashboard. There are two types of dashboards and two types of reports; shared dashboards, my dashboards, shared reports and my reports. Shared dashboards and reports are visible for all users, where my dashboards and reports only are visible for yourself. The input you need to fill in is; elements, period, name and location. In the end you have created a dashboard and/or report.

### Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.



The guide *may* contain important general notices. These will be marked with an exclamation icon.



Tips and tricks are marked with an Info-icon.



Questions & Answers note relevant to the topic at hand.

### 1 Select My dashboard

Open *My dashboard* in Dashboards ribbon.



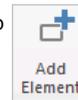
### 2 Edit layout

Click *Edit Layout* in setup ribbon to edit the dashboard layout. Now more options are added to the setup ribbon.



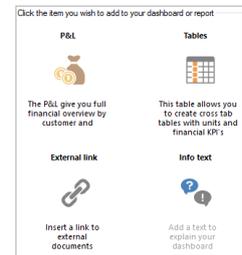
### 3 Add elements

Click *Add Element* and select, which elements you want to be added to the dashboard.



These are the elements, you can add:

- P&L
- KPI tables
- Charts
- Traffic light & gauges
- External link & info text
- Price lists
- Listing overview



The elements open in a configuration pop-up window, when you add them.

Each of the elements have their own Quick guide, where you can read about the configuration of them.

The only parameter that recurs in all elements is setting up the name. In View you can edit the name of the elements (Chart is used here) to a new one or keep the one BMS has assigned. Check or uncheck Show Header depending on, whether you would like the header inside the box or not. The header is the text and symbols marked in red.



Editing the layout gives you the opportunity to close elements in your Dashboard.

### 3 Placing elements

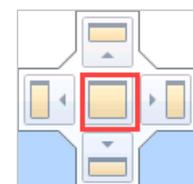
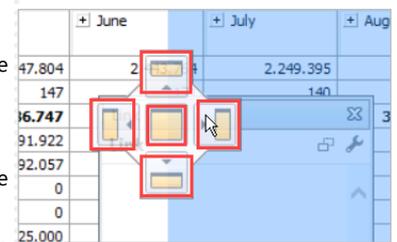
When you have added elements you need to figure out where to place the element on the dashboard.

The first element you add will automatically fill the working area.

The second will appear in a pop-up window next to the cursor on the screen.

Click the element to move it. A docking assistant appears on the screen where you can dock the element in the appropriate position. Drag the element to one of the five docking areas (highlighted in red) to dock the window in the middle of the screen. Each docking area indicates the position of the element after it has been docked. The area in blue indicates where the element will be docked.

If you place the element in the middle docking area of an existing element (second picture), the window will be placed in another tab than the first one. This creates different tabs in the bottom of the first tab (third picture).



## Quick guide for BMS



Click reset in ribbon to reset the dashboard to its default layout. All changes will be reversed.



You can edit the names of the report folders in System options. Here you can also select which folders you want to appear in the report menu.



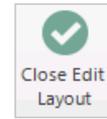
In the Reports menu, you can find report samples. These have a small guide how to configure graphs, KPI, P&L and tables. The tabs consist of the elements on the left side and explanatory text on the right side.

The docking area in the outer edges (fourth picture) of the tab places the element in the outer edges. If you place the element in the bottom of the tab, and then remove the first element, the second element will remain in the bottom of the tab.



### 5 Save layout

Click *Close Edit Layout* in the ribbon to save your new layout.



## Reports

You can create reports in two ways; by copying *My dashboard* and by creating a New report. Both options will be explained below.

### Save dashboard as report

#### 1 Save as

Click *Save As* in the top ribbon.



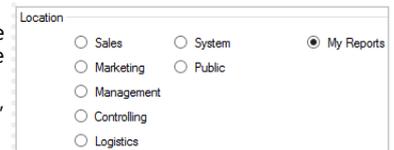
#### 2 Make a copy

If you want to create a report of your dashboard, select *Make a copy* in action.



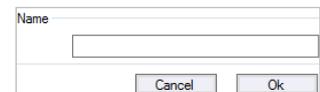
#### 3 Choose location

In *Location* choose where in your shared reports you want to save the report. If you choose to save the report here, you will find it in the ribbon under *Reports*, *Shared Reports* and in the chosen header. You can also choose *My Reports*. This also saves the copy in reports, but this time, it will be saved in *My Reports*.



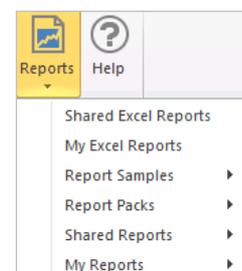
#### 4 Enter name

Enter a name for the report in the field below *Name*, click *Ok* to save. Now the dashboard opens in a new window.



#### 5 Open report

You find the dashboards you have saved in the ribbon under *Reports*. To open click *Reports* and select which report you want to open from the drop-down list.





Click on Reset in ribbon to reset the report to a default layout. All changes will be reversed.

Create new report

1 Open new report

Go *File* and under *New*, click on *Report* to create a new report.



2 Add elements to new report

Click on *Add Element* to create the content of the new report. A tab opens and this functions the same way as adding elements on your dashboard.  
Click on *Close Edit Layout* when you are done editing the new report.



3 Save the new report

Click *Save As* in the top ribbon. A new window will open.



4 Select Action

Select *Make a copy* to add and save the report in the system.

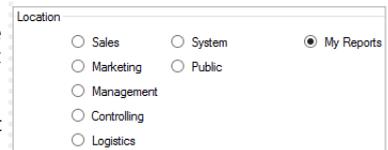
Alternately, select *Export to a File* to export and save the report as a file on the server of BMS.



5 Choose location

In *Location* choose where in your shared reports you want to save the report. If you choose to save the report in one of these files, the report will be saved under *Shared reports* folder in *Reports*.

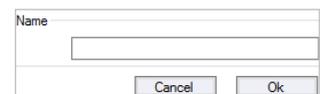
You can also choose *My reports*. This also saves the copy in *Reports*, but this time, it will be saved under the *My reports* folder.



6 Enter name

Enter a name for the report in the field below *Name*.

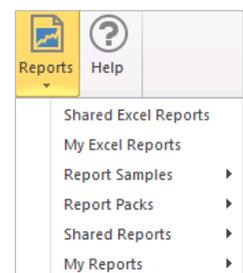
When you are done, click *Ok* to save the report.



7 Find and open the report

You find the reports you have saved in the list of folders under *Reports*.

To open click *Reports* and navigate yourself to the folder and reports you want to open.

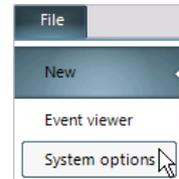


Setup Report folders

In BMS, you can manage the Report folders in the system. This can help you create different individual folders to categorize your reports for a faster and better use of them.

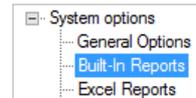
**1 Open System options**

Go to *File* and click on *System options*. A new window opens.



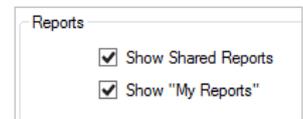
**2 Select Built-in reports**

From the tree-menu, click on the *Built-in Reports* and the corresponding tab will open in the main window.



**3 Edit the Reports**

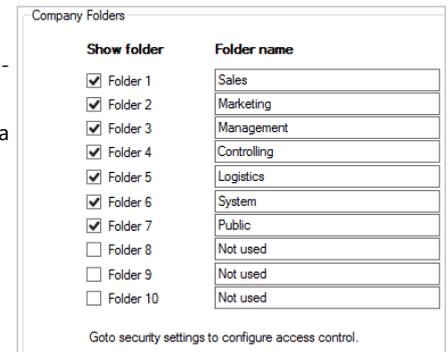
Check or uncheck the boxes of *Show Shared Reports* and *Show "My Reports"* to activate or hide the display of the folders under *Reports* in the system.



**4 Choose Company folders**

Check or uncheck the check-boxes of the ten different folders to activate or hide the display of them under *Reports* in the system.

Edit the name of each folder to categorize the reports in each one for a faster report use.

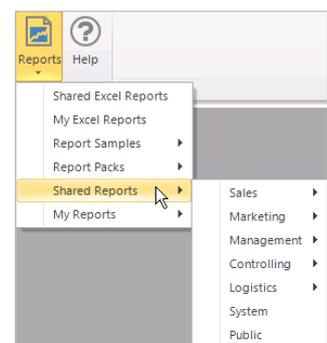


**5 Close System options**

Close the *System options* window, the changes are simultaneously saved.

**6 Find the Report folders**

Find the active report folders in the list of folders under *Reports*. To open, click on the *Shared reports* and navigate yourself to the folder you want to open and display the contents of.





If you want the same element but with different filters, you can copy the element to This dashboard. Then click the wrench icon to set the filters and click Ok to save the changes.

### Edit

#### Edit elements

You have different options next to the header with the windows in edit mode. These options depend on which window you want to edit.

##### Edit:

- Click the 'copy' icon to copy the window to another dashboard.
- Click the 'wrench' icon to edit the content of the window. Editing the context is explained in the Quick guides specific for the windows.
- Click the 'funnel' icon to add a filter to the window.

##### Save as external file:

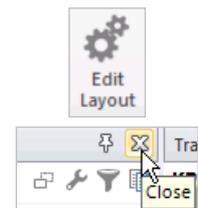
- Click the 'Excel' icon to save the data from the dashboard in an Excel file on your computer.
- Click the 'copy to clipboard' icon to copy the content of the window. This allows you to paste the content into an external document.

##### Navigate:

- Click the arrows with either a + or - to unfold or hide the information in the table.

#### Remove elements

To remove an element, click Edit layout in ribbon. This allows you to close the elements by clicking the cross in upper right corner of each element, just like if you want to close another document on your computer.



Security - User Roles

For a user to view and edit the Reports in the system, access needs to be granted from Security settings by a super-user/admin.

**Security**

From "File" select "Security" and the window with all the users in the system and the roles assigned to each one will open. Select a role to open the corresponding settings.



**Allow View & Edit Reports**

Check mark the boxes to allow the role to view and edit:

**Standard reports** - mark "System" to allow to work with standard BMS reports.

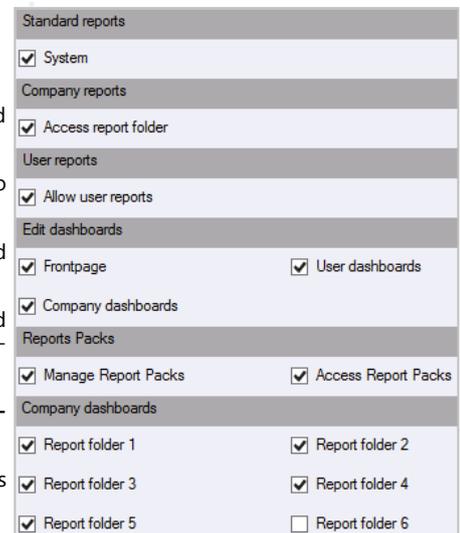
**Company reports** - mark "Access report folder" to allow access to the corresponding folder with company specific reports.

**User reports** - mark "Allow user reports" to allow the role to build his/her private reports.

**Edit dashboard** - mark "Frontpage", "User dashboards" and "Company dashboards" to allow access to the corresponding dashboards.

**Report Packs** - mark "Manage Report Packs" and " Access Reports Packs" to allow view and edit of the report packs.

**Company dashboards** - mark the "Report folder X" to allow access to the corresponding report folders.





*Can I share my reports?*

If you want to share your folders, you need to copy the report to Shared Reports. You can find a description of this under Reports in this guide.



*Can company report folders be renamed?*

Yes, you can configure the names of the folders in system options under Built-In reports.



*Can we control access to company reports?*

Yes, you do this in file under security.



*Will dashboards show data for all costumers?*

Yes, unless security is setup as limited. Then you can only see your own.



*Can we limit the access to edit the frontpage?*

Yes, you do this in security.



*Can I copy all elements to Excel in one go?*

No, you have to copy one element at a time.