

How to Update Canned Panel through a User Panel copy

1. [Activate a Canned Panel](#).
2. Open the activated canned panel copy on **Panel List > Active Panels** by hitting **Open** button.

Panel List								
Open New Import Refresh Report								
Active Panels Canned Panels								
View Filter (F3) 19 record(s) (1 selected)								
Panel Name	Panel Caption	Owner	Class	Style	Connection	Version	Panel Access	
☐ Vendor Performance - Sh...	Vendor Performance - Sh...	jbalachander	Master	Chart	i21	17.1.5	☒	
☐ Vendor Performance - Sh...	Vendor Performance - Sh...	jbalachander	Master	Pivot Grid	i21	17.1.2	☒	
☐ TEST PANEL	TEST PANEL	irelyadmin	Master	Grid	i21	17.1.11	☒	
☒ TEST CANNED PANEL	TEST CANNED PANEL	irelyadmin	Master	Grid	i21	17.1	☒	
☐ Sales Order by Type	Sales Order by Type	irelyadmin	Master	Chart	i21	16.1.3	☒	

3. Modify any field and hit **Save** button (ie. Rows Visible).

Panel Settings - TEST CANNED PANEL

New Save Undo Delete Duplicate Deactivate Search Refresh Query Builder User Access Pull Push Close

Details Settings

Panel Name

TEST CANNED PANEL

Class

Master

Rows Retrieved

0

Panel Caption

TEST CANNED PANEL

Style

Grid

Rows Visible

15

Description

Query

select * from tblCFTransaction

Connection

i21

Date Condition

None

Date Field

Other Filter

None

Filter Variable

Filter Field

Drill Down

None

☐ Auto Refresh panel every

1

Minute

Owner

irelyadmin

Order By

☐ Descending

?

Edited

Page 1 of 1

4. Hit **Push** button and select **OK** on warning message to cascade the changes on the canned panel.

Panel Settings - TEST CANNED PANEL

New Save Undo Delete Duplicate Deactivate Search Refresh Query Builder User Access Pull **Push** Close

Details Settings Update Canned Panel with this setting

Panel Name: TEST CANNED PANEL Class: Master Rows Retrieved: 0

Panel Caption: TEST CANNED PANEL Style: Grid Rows Visible: 15

Description:

Query: select * from tblCFTransaction

Connection: i21 Date Condition: None Date Field:

Other Filter: None Filter Variable: Filter Field:

Drill Down: None ☐ Auto Refresh panel every 1 Minute

Owner: irelyadmin Order By: Descending

Page 1 of 1

5. The changes can be verified by [opening the canned panel](#).

Panel Settings - TEST CANNED PANEL

New Save Undo Delete Search Refresh Query Builder Apply to Users Close

Details Settings

Panel Name: TEST CANNED PANEL Class: Master Rows Retrieved: 0

Panel Caption: TEST CANNED PANEL Style: Grid Rows Visible: 15

Description:

Query: select * from tblCFTransaction

Connection: i21 Date Condition: None Date Field:

Other Filter: None Filter Variable: Filter Field:

Drill Down: None ☐ Auto Refresh panel every 1 Minute

Owner: Order By: Descending

Page 1 of 1

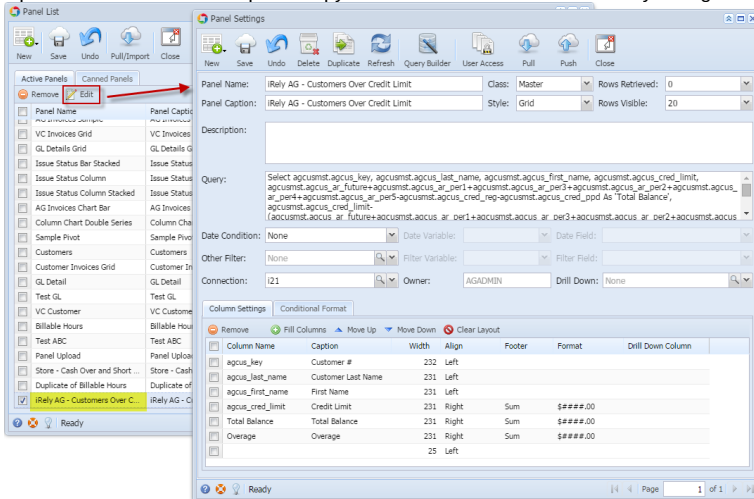
Ready



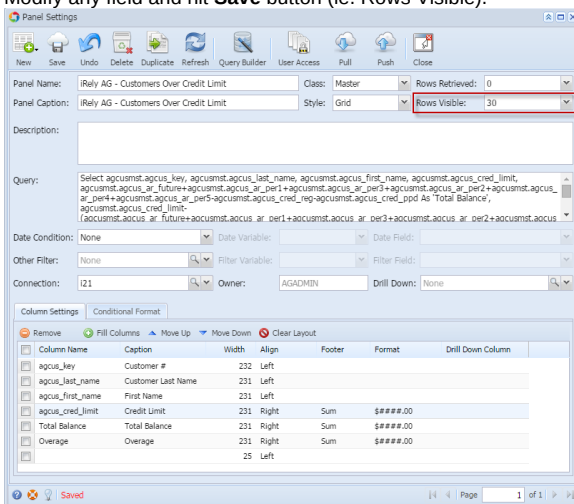
Any changes to canned panel may be overwritten upon version upgrade.

1. [Activate a Canned Panel](#).

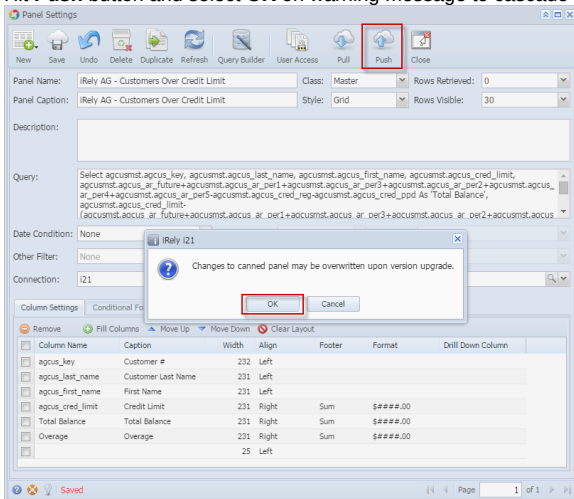
- Open the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.



- Modify any field and hit **Save** button (ie. Rows Visible).



- Hit **Push** button and select **OK** on warning message to cascade the changes on the canned panel.



5. The changes can be verified by [opening the canned panel](#).

Panel Settings

New Save Undo Delete Refresh Query Builder Apply to Users Close

Panel Name: IRly AG - Customers Over Credit Limit Class: Master Rows Retrieved: 0

Panel Caption: IRly AG - Customers Over Credit Limit Style: Grid Rows Visible: 30

Description:

Query: Select agcumst.agcus_key, agcumst.agcus_last_name, agcumst.agcus_first_name, agcumst.agcus_cred_limit, agcumst.agcus_ar_future+agcumst.agcus_ar_per1+agcumst.agcus_ar_per3+agcumst.agcus_ar_per5+agcumst.agcus_ar_per4+agcumst.agcus_ar_per5+agcumst.agcus_cred_req+agcumst.agcus_cred_ppd As Total Balance, agcumst.agcus_cred_limit- (agcumst.agcus_ar_future+agcumst.agcus_ar_per1+agcumst.agcus_ar_per3+agcumst.agcus_ar_per5+agcumst.agcus

Date Condition: None Date Variable: Date Field:

Other Filter: None Filter Variable: Filter Field:

Connection: I21 Owner: Canned Panel Drill Down: None

Column Settings Conditional Format

Remove Fill Columns Move Up Move Down Clear Layout

Column Name	Caption	Width	Align	Footer	Format	Drill Down Column
agcus_key	Customer #	232	Left			
agcus_last_name	Customer Last Name	231	Left			
agcus_first_name	First Name	231	Left			
agcus_cred_limit	Credit Limit	231	Right	Sum	####.00	
Total Balance	Total Balance	231	Right	Sum	####.00	
Overage	Overage	231	Right	Sum	####.00	
		25	Left			

Ready Page 1 of 1

Any changes to canned panel may be overwritten upon version upgrade.