

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 | |
| <input type="checkbox"/> Vendor Performance - Sh... | Vendor Performance - Sh... | jbalachander | Master | Chart | i21 | 17.1.5 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> Vendor Performance - Sh... | Vendor Performance - Sh... | jbalachander | Master | Pivot Grid | i21 | 17.1.2 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> TEST PANEL | TEST PANEL | irelyadmin | Master | Grid | i21 | 17.1.11 | <input checked="" type="checkbox"/> | |
| <input checked="" type="checkbox"/> TEST CANNED PANEL | TEST CANNED PANEL | irelyadmin | Master | Grid | i21 | 17.1 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> Sales Order by Type | Sales Order by Type | irelyadmin | Master | Chart | i21 | 16.1.3 | <input checked="" type="checkbox"/> | |

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.

The screenshot shows the 'Panel Settings - TEST CANNED PANEL' dialog box. The 'Settings' tab is active. The 'Panel Name' is 'TEST CANNED PANEL', 'Class' is 'Master', 'Rows Retrieved' is '0', 'Panel Caption' is 'TEST CANNED PANEL', 'Style' is 'Grid', and 'Rows Visible' is '15'. The 'Query' field contains 'select * from tblCFTransaction'. The 'Connection' is 'i21', 'Date Condition' is 'None', 'Date Field' is empty, 'Other Filter' is 'None', 'Filter Variable' is empty, 'Filter Field' is empty, 'Drill Down' is 'None', 'Auto Refresh panel every' is '1' Minute, 'Owner' is 'irelyadmin', and 'Order By' is empty. The 'Push' button is highlighted in orange. The status bar at the bottom shows 'Saved'.

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

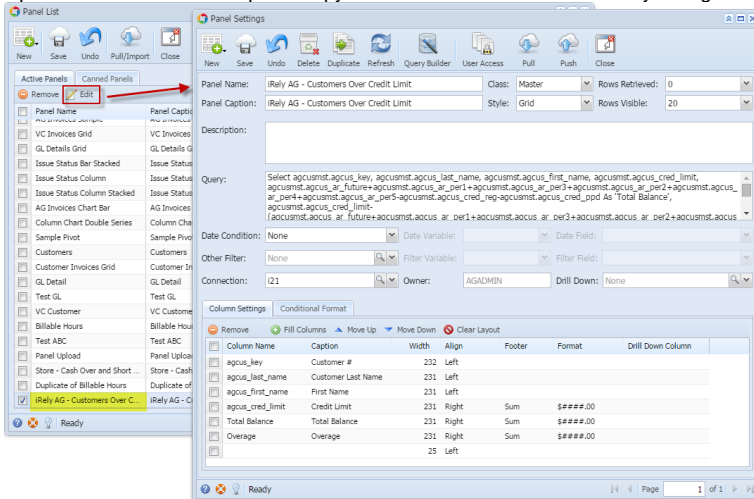
The screenshot shows the 'Panel Settings - TEST CANNED PANEL' dialog box. The 'Settings' tab is active. The 'Panel Name' is 'TEST CANNED PANEL', 'Class' is 'Master', 'Rows Retrieved' is '0', 'Panel Caption' is 'TEST CANNED PANEL', 'Style' is 'Grid', and 'Rows Visible' is '15'. The 'Query' field contains 'select * from tblCFTransaction'. The 'Connection' is 'i21', 'Date Condition' is 'None', 'Date Field' is empty, 'Other Filter' is 'None', 'Filter Variable' is empty, 'Filter Field' is empty, 'Drill Down' is 'None', 'Auto Refresh panel every' is '1' Minute, 'Owner' is empty, and 'Order By' is empty. The 'Rows Visible' field is highlighted in cyan. The status bar at the bottom shows 'Ready'.



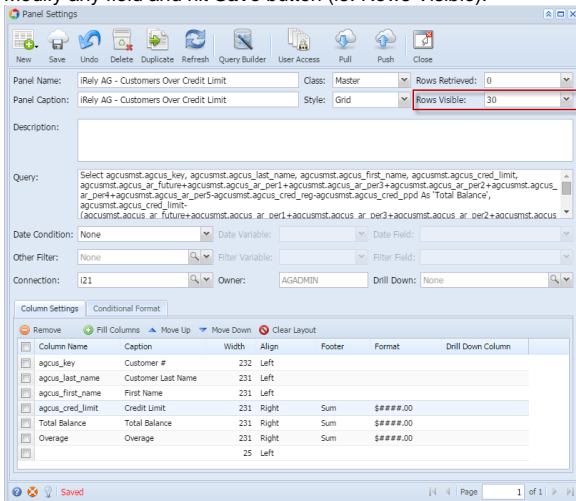
Any changes to canned panel may be overwritten upon version upgrade.

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

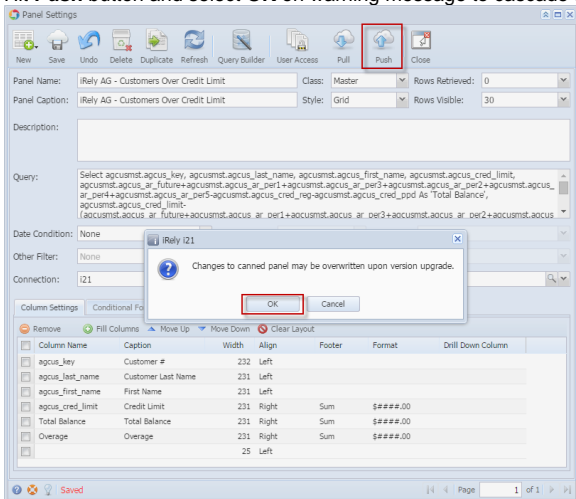
2. Open the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.



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



4. 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: IRely AG - Customers Over Credit Limit Class: Master Rows Retrieved: 0

Panel Caption: IRely 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_cred_req) As Overage

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

| 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



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