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.

| Open New - Import Refre | sh Report - | | | | | | |
|-----------------------------|--------------------------|--------------|--------|------------|------------|---------|--------------|
| Active Panels Canned Panels | | | | | | | |
| B View Q Filter (F3) | 19 record(s) (1 selecter | d) | | | | | |
| Panel Name 🔻 | Panel Caption | Owner | Class | Style | Connection | Version | Panel Access |
| Vendor Performance - Sh | Vendor Performance - Sh | jbalachander | Master | Chart | i21 | 17.1.5 | \checkmark |
| Vendor Performance - Sh | Vendor Performance - Sh | jbalachander | Master | Pivot Grid | i21 | 17.1.2 | \checkmark |
| TEST PANEL | TEST PANEL | irelyadmin | Master | Grid | i21 | 17.1.11 | \checkmark |
| TEST CANNED PANEL | TEST CANNED PANEL | irelyadmin | Master | Grid | i21 | 17.1 | ~ |
| Sales Order by Type | Sales Order by Type | irelyadmin | Master | Chart | 121 | 16.1.3 | ~ |

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

| | ings | | | | | | | | | | |
|---------------------------|---------------|--------------|--------|----------------|------|-------|--------|---|----------------|----|--|
| anel Name | * TEST CANNED | PANEL | | | | Class | Master | ~ | Rows Retrieved | 0 | |
| anel Caption | TEST CANNED | PANEL | | | | Style | Grid | ~ | Rows Visible | 15 | |
| escription | | | | | | | | | | | |
| luery | select * from | tblCFTransac | tion | | | | | | | | |
| | | | | | | | | | | | |
| onnection | i21 | | ~ | Date Condition | None | | | ✓ Date | Field | | |
| onnection ther Filter: | i21 None | | × × | Date Condition | None | | | ✓ Date✓ Filter | : Field | | |

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

| Second Second | age | | | | | | | | | | | _ |
|------------------------------------|---------------------|---------------|---|------------------------------------|----------|-------|----------|--------------------|-------------------|---------------|---------------------------|----|
| nel Name | TEET CANNED D | | | | | Class | Manager | | | Update Cann | ed Panel with this settin | ng |
| nel Cantion | TEST CANNED PA | ANEL | | | | Ciass | Iviaster | | Ť | Pows Visible | 0 | |
| nel caption | TEST CANNED PA | INEL | | | | Style | Grid | | ~ | Nows visible | 15 | |
| scription | | | | | | | | | | | | |
| uery | select * from tbl | CFTransaction | | | | | | | | | | |
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| | | | | | | | | | | | | |
| nnection | i21 | | ✓ Date Cor | dition No | ine | | | ~ D |)ate F | ield | | |
| nnection her Filter: | i21 None | | ✓ Date Cor✓ Filter Var | idition No | ne | | | ✓ D |)ate F | ield | | |
| nnection ner Filter: II Down | i21 None None | | Date Cor Filter Var Auto I | idition No iable lefresh pan | el every | 1 | ≎ M | v D v F nute |)ate F ilter f | ield field | | |
| nnection ner Filter: Il Down | i21 None None | | Date Cor Filter Var Auto I Order By | idition No iable Refresh pan | el every | 1 | \$ M | V D |)ate F ilter f | ield | | |

5. The changes can be verified by opening the canned panel.

| Panel Name • TEST CANNED PANEL Class Master v Rows Retrieved 0 v Panel Caption TEST CANNED PANEL Style Grid v Rows Visible 15 v Query select * from tblCFTransaction | Details Sett | ings | | | | | | | | | |
|---|---|----------------------------|------|-----------------------------------|------|-------|-----------------------|------|----------------|----|-----|
| Panel Caption TEST CANNED PANEL Style Grid Rows Visible 15 Query select * from tblCFTransaction Image: Style Style | Panel Name | * TEST CANNED PANEL | | | | Class | Master | ~ | Rows Retrieved | 0 | ~ |
| Description Query Select * from tblCFTrensection | Panel Caption | TEST CANNED PANEL | | | | Style | Grid | ~ | Rows Visible | 15 | ~ |
| Query select * from tblCFTransaction | Description | | | | | | | | | | |
| | Query | select * from tblCFTransac | tion | | | | | | | | |
| | | | | | | | | | | | |
| Connection i21 v Date Condition None v Date Field v | Connection | 121 | ~ | Date Condition | None | | ~ | Date | Field | | ~ |
| Connection 121 v Date Condition None v Date Field v Other Filter: None v Filter Variable v Filter Field v | Connection Other Filter: | i21 None | ~ | Date Condition Filter Variable | None | | ~ ~ | Date | Field | | ~ |
| Connection 121 v Date Condition None v Date Field v Other Filter: None v Filter Variable v Filter Field v Drill Down None v Auto Refresh panel every 1 Minute | Connection Other Filter: Drill Down | i21 None None | | Date Condition Filter Variable | None | 1 | v v V Minute | Date | Field | | ~ ~ |

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.

| Panel List | | 🟮 Panel Setting | s | | | | | | | | | | |
|--|---|-------------------------------|--|--|---|---|--|---|---|---|--|--|-----------|
| New Save Undo Pull/Impo | rt Close | New Save | Undo Dele | te Duplicate | 2 Refresh | Query Builde | r User | Access | Pull | Push | Close | | |
| Active Panels Canned Panels | Panel Captic | Panel Name: Panel Caption: | iRely AG - C iRely AG - C | ustomers Over ustomers Over | r Credit L r Credit L | imit imit | | Class: Style: | Master Grid | * | Rows Retrieved: Rows Visible: | 0 20 | * |
| VC Involces Grid GL Details Grid Issue Status Bar Stacked | VC Invoices GL Details G Issue Status | Description: | | | | | | | | | | | |
| Issue Status Column Issue Status Column Stacked AG Invoices Chart Bar Column Chart Double Series | Issue Status Issue Status AG Invoices Column Cha | Query: | Select agcu agcusmst.a ar_per4+ag agcusmst.a (aocusmst.a | smst.agcus_ke gcus_ar_future cusmst.agcus gcus_cred_lim юcus_ar_futu | ey, agcus e+agcusr _ar_per5- it- re+agcus | mst.agcus_la nst.agcus_ar_ agcusmst.ag mst.agcus_a | st_name _per1+a cus_cred r_per1+a | , agcusm gcusmst.a I_reg-agc agcusmst. | st.agcus_f igcus_ar_p usmst.agc agcus_ar | irst_name ber3+agcu us_cred_p ber3+agc | , agcusmst.agcus_o usmst.agcus_ar_per opd As 'Total Baland cusmst.agcus_ar_pe | rred_limit, 2+agcusmst :e', :r2+aocusms | .agcus_ 🕯 |
| Sample Pivot | Sample Pivo Customers | Date Condition | None | | ~ | Date Variab | le: | | Y | Date Fiel | | | |
| Customer Invoices Grid | Customer In GL Detail | Connection: | i21 | | 9.4 | Owner: | AG/ | ADMIN | | Drill Dow | m: None | | ٩, • |
| VC Customer | VC Custome Billable Hour | Column Settin | condition | al Format | | | | | | | | | |
| Test ABC | Test ABC Panel Uploar | Column N | Fill Colu ame | mns 🔺 Move Caption | Up 🔻 I | Width / | S Clear I Align | Layout Fo | oter | Format | Drill Down | Column | |
| Store - Cash Over and Short Duplicate of Billable Hours Rely AG - Customers Over C | Store - Cash Duplicate of iRely AG - Ci | agcus_ke | / t_name st_name ed limit | Customer # Customer Last f First Name Credit Limit | Name | 232 1 231 1 231 1 231 1 | .eft .eft .eft Right | Su | m | \$====.(| 00 | | |
| 🞯 💆 👷 Ready | | Total Bala | ince | Total Balance Overage | | 231 8 231 8 25 1 | Right Right Jeft | Su | m | \$####.(\$####.(| 00 00 | | |
| | | 2 😧 👷 Re | idy | | | | | | | | Id d Page | 1 | of 1 🕨 🕽 |

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

| Pariel Setting: | 5 | | | | | | | | | | | | × | |
|-----------------|--|--|--|--|---|--------------------------------------|--|--|--|--|---|--|--------------------------------|-----|
| New Save | Vindo | Delete | Duplicate | 2 Refresh | Query Buil | der | User Access | Pull | Push | Close | | | | |
| Panel Name: | iRely AG | - Custo | omers Ove | r Credit L | imit | | Class | Master | Y | Rows | Retrieved: | 0 | | ~ |
| Panel Caption: | iRely AG | - Custo | omers Ove | r Credit L | imit | | Style | Grid | ~ | Rows | Visible: | 30 | | ~ |
| Description: | | | | | | | | | | | | | | |
| Query: | Select a agcusm ar_per4 agcusm (accusm | gcusms st.agcus +agcus st.agcus nst.agcu | t.agcus_k s_ar_futur mst.agcus s_cred_lim us_ar_futu | ey, agcus e+agcus _ar_per5 ilt- re+accus | mst.agcus_ nst.agcus_a -agcusmst.a mst.agcus | last_n ar_per: igcus_ ar_pe | ame, agcus 1+agcusms cred_reg-ag r1+aqcusm: | mst.agcus .agcus_ar .cusmst.ag .t.aocus_a | _first_name _per3+agct jcus_cred_p r_per3+agc | , agcusi Jsmst.ag opd As " Tusmst.a | nst.agcus_(jcus_ar_pei Total Balani iocus ar pe | cred_limit, r2+agcusm ce', er2+agcusn | st.agcus <u>.</u> hst.agcus | - (|
| ate Condition: | None | | | ~ | Date Varia | ble: | | | | | | | | |
| Other Filter: | None | | | ٩. • | Filter Varia | | | | Filter Fie | | | | | |
| Connection: | i21 | | | ٩. • | Owner: | | AGADMIN | | Drill Dov | n: Nor | ne | | C | 2. |
| Column Setting | s Cond | itional P | ormat | | | | | | | | | | | |
| C Remove | O Fill | Columns | Move | Up 🔻 | Move Down | o d | lear Lavout | | | | | | | |
| Column Na | ame | Cap | tion | | Width | Align | | ooter | Format | | Drill Down | n Column | | |
| agcus_key | | Cust | tomer # | | 232 | Left | | | | | | | | |
| agcus_last | t_name | Cust | tomer Last | Name | 231 | Left | | | | | | | | |
| agcus_firs | t_name | First | t Name | | 231 | Left | | | | | | | | |
| agcus_cre | d_limit | Crea | dit Limit | | 231 | Right | | ium | \$####.(| 00 | | | | |
| Total Balar | nce | Tota | al Balance | | 231 | Right | | ium | \$####.(| 00 | | | | |
| Overage | | Ove | rage | | 231 | Right | | um | \$####.(| 00 | | | | |
| | | | | | 25 | Left | | | | | | | | |
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|) 🔮 🏆 Sav | red | | | | | | | | | 14 | 4 Page | 1 | of 1 0 | ŀ |

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

| 🕽 Panel | Settings | | | | | | | | | | | | | 2 🗆 |
|-----------------------|---------------|--|---|---|---|---|--|---|---|--|---|---|---|-------------|
| 0. | P | S | 0 | | Ð | | | | | | 7 | | | |
| New | Save | Undo | Delete | Duplicate | Refresh | Query Build | ler Use | r Access | Pull | Push | Close | | | |
| Panel Na | ame: | iRely A | AG - Cus | tomers Ove | ar Credit L | imit | | Class: | Master | | Rows | Retrieved: | 0 | |
| Panel Ca | aption: | iRely A | AG - Cus | tomers Ove | er Credit L | imit | | Style: | Grid | • | Rows | visible: | 30 | • |
| Descripti | ion: | | | | | | | | | | | | | |
| Query: | | Select agcus ar_per agcus (agcus | agcusm mst.agcu 4+agcu mst.agcu smst.agcu | st.agcus_k us_ar_futu smst.agcus us_cred_lir us_ar_futu | ey, agcus re+agcusr s_ar_per5- nit- ire+aocus | mst.agcus_ nst.agcus_a -agcusmst.a mst.agcus | last_nam r_per1+a gcus_cre ar per1+ | e, agcusm gcusmst.: d_reg-agc aocusmst | ist.agcus agcus_ar usmst.aç .aqcus_a | _first_name _per3+agc jcus_cred_j r_per3+ag | a, agcusm usmst.ago ppd As 'Ti cusmst.ac | st.agcus_o cus_ar_per otal Balano icus ar pe | cred_limit, r2+agcusms ce', er2+agcusm | st.agcus_ |
| Date Cor | ndition: | None | | | Lu 121 | | | | | | | | | |
| Other Fil Connecti | iter: ion: | None i21 | | 2 | Chan | ges to cann | ed panel | may be o | verwritte | n upon ver | sion upgr | ade. | | ۹. |
| Column | n Settings | Co | nditional | Fo | | | OK |) c | ancel | | | | | |
| 😑 Ren | nove | 🔘 Fi | II Columr | is 🔺 Mov | e Up 🔻 | Move Down | 🚫 Clear | Layout | | | | | | |
| C 0 | olumn Na | me | Ca | ption | | Width | Align | Fo | oter | Format | | Drill Down | n Column | |
| 26 | gcus_key | | Cu | stomer # | | 232 | Left | | | | | | | |
| - ag | gcus_last | name | Cu | stomer Last | Name | 231 | Left | | | | | | | |
| 🗐 ag | gcus_first | _name | Fin | st Name | | 231 | Left | | | | | | | |
| 🗐 ag | gcus_cred | limit | Cre | edit Limit | | 231 | Right | Su | m | \$2222. | 00 | | | |
| T To | otal Balar | ce | Tot | al Balance | | 231 | Right | Su | m | \$####. | 00 | | | |
| 0 | verage | | Ov | erage | | 231 | Right | Su | m | \$####. | 00 | | | |
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| | 010- | | | | | | | | | | | 4 Page | | of the last |
| | 1 Save | NU C | | | | | | | | | | rage | 1 | |

5. The changes can be verified by opening the canned panel.

| New Save | Undo E | Delete Refresh Q | uery Builder Appl | or to Users | Close | | | | | |
|--|--|---|--|---|--|--|---|--|--|----------------------|
| Panel Name: | iRely AG | - Customers Over C | Credit Limit | | Class: | Master | * | Rows Retrieved: | 0 | |
| Panel Caption: | iRely AG | - Customers Over O | Credit Limit | | Style: | Grid | ~ | Rows Visible: | 30 | |
| Description: | | | | | | | | | | |
| Query: | Select ag agcusms ar_per4+ agcusms (accusms | icusmst.agcus_key, t.agcus_ar_future+ agcusmst.agcus_a t.agcus_cred_limit- st.agcus_ar_future | , agcusmst.agcus agcusmst.agcus r_per5-agcusmst. +aocusmst.agcus | _last_nam _ar_per1+ agcus_cre = ar_per1+ | ne, agcusm: agcusmst.a ed_reg-agci +agcusmst. | t.agcus_l gcus_ar_ ismst.agc aocus_ar | first_name, a per3+agcusi cus_cred_pp per3+agcus | igcusmst.agcus_c mst.agcus_ar_per d As 'Total Balanc amst.agcus_ar_pe | tred_limit, 2+agcusms te', er2+aocusm | t.agcus_ st.agcus |
| ato Condition: | None | | ▼ Date Var | iable: | | v | Date Field: | | | |
| ate condition. | | | | | | | | | | |
| Other Filter: | None | | ♥ Filter Var | iable: | | | Filter Field: | | | |
| Other Filter: | None i21 | | Q ▼ Filter Var Q ▼ Owner: | iable: | anned Pane | v | Filter Field: Drill Down | None | | q |
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| Other Filter: Connection: Column Setting: | None i21 Condr | tional Format | Q ▼ Filter Var Q ▼ Owner: | iable: | anned Pane | v | Filter Field: | None | | Q |
| Column Setting: | None i21 Condi G Fill C me | tional Format olumns A Move U Caption | Q ▼ Filter Var Q ▼ Owner: p ▼ Move Down Width | iable: Ca O Clear Align | anned Pane r Layout For | × | Filter Field: Drill Down | None Drill Dowr | n Column | 9 |
| Column Setting: Column Setting: Column National Column | None i21 Condi Fill C me | tional Format olumns A Move U Caption Customer # | Q ▼ Filter Var Q ▼ Owner: p ▼ Move Down Width 232 | iable: Ca O Clear Align Left | r Layout For | × | Filter Field: Drill Down | None Drill Dowr | n Column | C |
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| Column Setting: Column Setting: Column Setting: Column Na Column Na Column Na Column Na Column Na Column Na Column Setting: Column S | None i21 S Condr S Fill C me _name t_name t_limit | tional Format olumns A Move U Caption Customer # Customer Lest Na First Name Credit Limit | Pitter Var Wove Down Width 231 231 | iable: Ca Align Left Left Right | anned Pane r Layout For Sur | ter n | Filter Field: Drill Down Format | None | 1 Column | |
| Column Setting: Column Setting: Column Setting: Column Na agcus_key agcus_first agcus_first agcus_crect Total Balar | None i21 Condr Fill C me _name name i_limit xce | tional Format columns A Move U Caption Customer # Customer Last Na First Name Credit Limit Total Balance | Pitter Var Wove Down Width 231 231 231 | Align Left Left Right Right | r Layout For Sur Sur | ter n | Filter Field: Drill Down Format | : None Drill Down | n Column | |
| Other Filter: Connection: Column Setting: Remove Column Na agcus_key agcus_stat agcus_stat agcus_crec Total Balar Overage | None i21 Condr Fill C me _name i_iname i_iname i_iname | tional Format columns 	Move U Caption Customer # Customer Last Na Frist Name Credit Limit Total Balance Overage | P ▼ Hiter Var P ▼ Owner: P ▼ Move Down Width 232 me 231 231 231 231 231 | Clear Align Left Left Right Right Right | r Layout For Sur Sur Sur | vter n n | Filter Field: Drill Down Format \$####.00 \$####.00 | Drill Dowr | n Column | |

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