

How to Build a Panel

Building a **new Dashboard Panel** can be accomplished to fulfill your specific requirements and/or filters. These steps focus on the fields to complete in the **Panel Settings** screen.

1. Open **Search Panel List** screen.
2. Click **New toolbar button** > **New Panel**.
3. Enter in the appropriate information in the Panel Settings screen. See below for the description of each field.

- **Panel Name:** Enter the name the panel will be called.
- **Class:** Master will be used most often.
- **Rows Retrieved:** Select the number of rows you want to return data, select 0 to return all data (recommended).
- **Panel Caption:** Title of the panel, which will be display on Dashboard.
- **Style:** Choose which type of panel you want to create; Grid, Pivot Grid or Chart. When you set up different sets of column settings, changing the Style of the Panel will reflect the columns selected for the particular style (Grid or Pivot Grid). It's most likely Style per Column Settings setup.
- **Rows Visible:** Select the numbers of records you want to display on dashboard.
- **Description:** Enter any comments or descriptions of the panel.
- **Query:** Enter or build your query here. The TOP keyword is well supported when the data connection is MySQL.

- --
- /*
- */
- Begin
- Truncate
- Exec
- Drop
- Backup
- Restore
- Cursor
- Execute
- Syscolumns
- Open
- Kill
- Fetch
- Bulk
- Rename
- Alter
- Create
- Revoke
- Grant
- Xp_cmdshell
- Host_name
- Db_name

- Sysprocesses
- Sysobjects
- Syslogins
- Sysdatabases
- ;
- **Date Condition:** Select from the combo box the Date condition you want to default to, if using this option.
- **Date Field:** Enter the field that you want the Date Condition to pull from.
- **Other Filter:** By default is None. Select the appropriate Filter Name from the combo box list.
- **Filter Variable:** Enter "@FILTER@" or #FILTER# if used.
- **Filter Field:** Enter the field that you want the Other Filter to pull from.
- **Connection:** Select the appropriate Connection Name from the combo box list from where the panel will be accessing the database.
- **Owner:** Tag field that let the user select and assign multiple owner to a panel.
- **Drill Down:** Select the panel that you want to be drilled down. This field is disabled though when Panel Style is set to Chart.
- **Auto refresh Panel:** Set time interval to refresh specific panel.
- **Order By:** Sort records automatically when panel is displayed.
- **Column Settings:**
 - a. **Column Name:** Select the Alias or field that you want to display from the entered query
 - b. **Caption:** Enter the title you will want to call this column.
 - c. **Width:** How long do you want the field to be.
 - d. **Align:** Left, Center, or Right
 - e. **Footer:** Choose from combo box list, you can Sum this field as well as much more.
 - f. **Format:** Choose from many options on how you want the data to display in the panel



You can use the **Fill Columns** button to fill in the **Column Settings** field with the fields specified in the **Query**. See sample below.

The screenshot shows the 'Panel Settings - TEST PANEL' dialog box. The 'Settings' tab is active, and the 'Column Settings' sub-tab is selected. A confirmation message from iRely i21 is displayed in the center, asking if the user wants to auto-fill their Column Settings, noting that any current settings will be overridden. The message includes 'Yes' and 'No' buttons.

Panel Settings - TEST PANEL

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

Details Settings

Column Settings Conditional Format

✕ Remove + Insert + Fill Columns ▲ Move Up ▼ Move Down ⌂ Clear Layout

☒ Column Name Caption Width Align Footer Format Drill Down Column Drill Down Screen Name

☒

iRely i21

Do you want to auto-fill your Column Settings?
If you have current settings, this will be overridden.

Yes No

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The screenshot shows the 'Panel Settings - TEST PANEL' dialog box with the 'Column Settings' sub-tab active. The table lists various columns with their names, captions, widths, and alignments. The 'Fill Columns' button is visible at the top of the table.

Panel Settings - TEST PANEL

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

Details Settings

Column Settings Conditional Format

✕ Remove + Insert + Fill Columns ▲ Move Up ▼ Move Down ⌂ Clear Layout

<input type="checkbox"/>	Column Name	Caption	Width	Align	Footer	Format	Drill Down Column	Drill Down Screen Name
<input type="checkbox"/>	intTransactionId		75	Left				
<input type="checkbox"/>	intPriceIndexId		75	Left				
<input type="checkbox"/>	intPriceProfileId		75	Left				
<input type="checkbox"/>	intSiteGroupId		75	Left				
<input type="checkbox"/>	strPriceProfileId		75	Left				
<input type="checkbox"/>	strPriceIndexId		75	Left				
<input type="checkbox"/>	strSiteGroup		75	Left				
<input type="checkbox"/>	dblPriceProfileRate		75	Left				
<input type="checkbox"/>	dblPriceIndexRate		75	Left				
<input type="checkbox"/>	dtmPriceIndexDate		75	Left				
<input type="checkbox"/>	intContractDetailId		75	Left				
<input type="checkbox"/>	intContractId		75	Left				
<input type="checkbox"/>	dblQuantity		75	Left				
<input type="checkbox"/>	dtmBillingDate		75	Left				
<input type="checkbox"/>	dtmTransactionDate		75	Left				

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4. Click **Save** toolbar button then **Close**. The panel will now be on the **Search Panel List** and ready to be displayed on the Dashboard.

Search Panel Lists

Close

Active Panels

Canned Panels

Open Selected

Export

Columns

View

New

Import

4 records

Panel Name

Contains

Add Filter

Clear Filter

	Panel Name	Panel Caption	Owner	Class	Style	Connection	Version	Panel Access
<input type="checkbox"/>	AG Customers	AG Customers Caption	irelyadmin	Master	Grid	I21	19.1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AR Invoice	AR Invoice Caption	irelyadmin	Master	Grid	I21	19.1.2	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AR Customers	AR Customers Caption	irelyadmin	Master	Grid	I21	19.1.2	<input checked="" type="checkbox"/>
<input type="checkbox"/>	TEST PANEL	TEST PANEL	irelyadmin	Master	Grid	I21	19.1.3	<input checked="" type="checkbox"/>

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Ready

Refresh



To build a **Canned Panel**:

a. On **Panel Settings**, click **New toolbar button** > **New Canned Panel**

The screenshot shows the 'Panel Settings' window with the 'New Canned Panel' button highlighted in the 'New Panel' section. The form includes fields for 'Panel Caption', 'Description', and 'Query', and dropdown menus for 'Class' (set to 'Master'), 'Style' (set to 'Grid'), 'Rows Retrieved' (set to '0'), and 'Rows Visible' (set to '5').

b. On **Search Panel List**, click **New toolbar button** > **New Canned Panel**

The screenshot shows the 'Panel List' window with the 'New Canned Panel' button highlighted in the 'New' dropdown menu. The window displays a table with columns 'Panel Name', 'Panel Caption', and 'Owner'. The table shows 24 records.

Owner will be automatically set to **Canned Panel**.

The screenshot shows the 'Panel Settings' window with the 'Canned Panel' configuration. The 'Details' tab is active, showing fields for 'Panel Name', 'Panel Caption', 'Description', and 'Query'. The 'Settings' tab is also visible, showing fields for 'Date Condition', 'Date Variable', 'Date Field', 'Other Filter', 'Filter Variable', 'Filter Field', 'Connection', 'Owner' (set to 'Canned Panel'), and 'Drill Down'.

