

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

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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'.

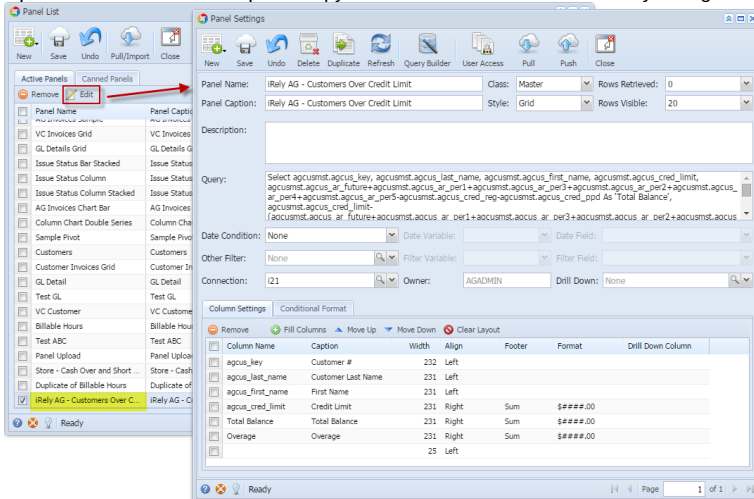
5. The changes can be verified by [opening the canned panel](#).

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' value '15' is highlighted in cyan. The status bar at the bottom shows 'Ready'.

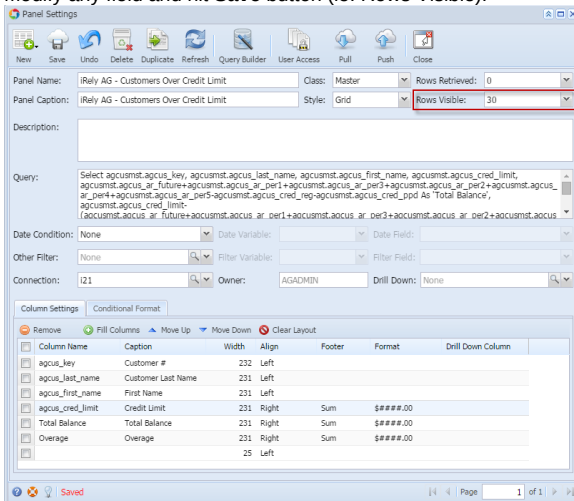
 Any changes to canned panel may be overwritten upon version upgrade.

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

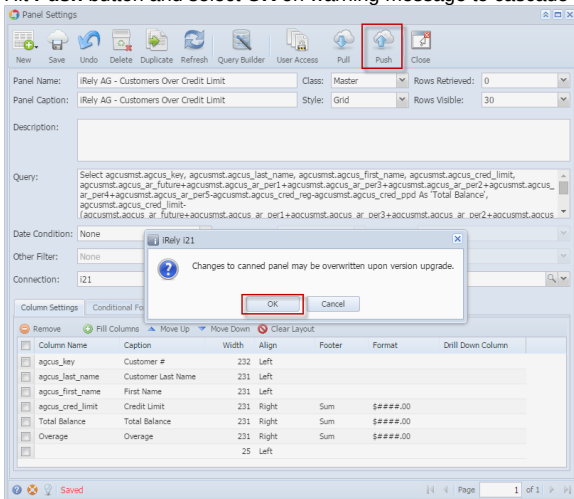
2. Open the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.



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: 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_per2+agcumst.agcus_ar_per3+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_per2+agcumst.agcus_ar_per3+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_per2+agcumst.agcus_ar_per3+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_per2+agcumst.agcus_ar_per3+agcumst.agcus_ar_per4+agcumst.agcus_ar_per5+agcumst.agcus_cred_req+agcumst.agcus_cred_ppd) As Total Balance

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			

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