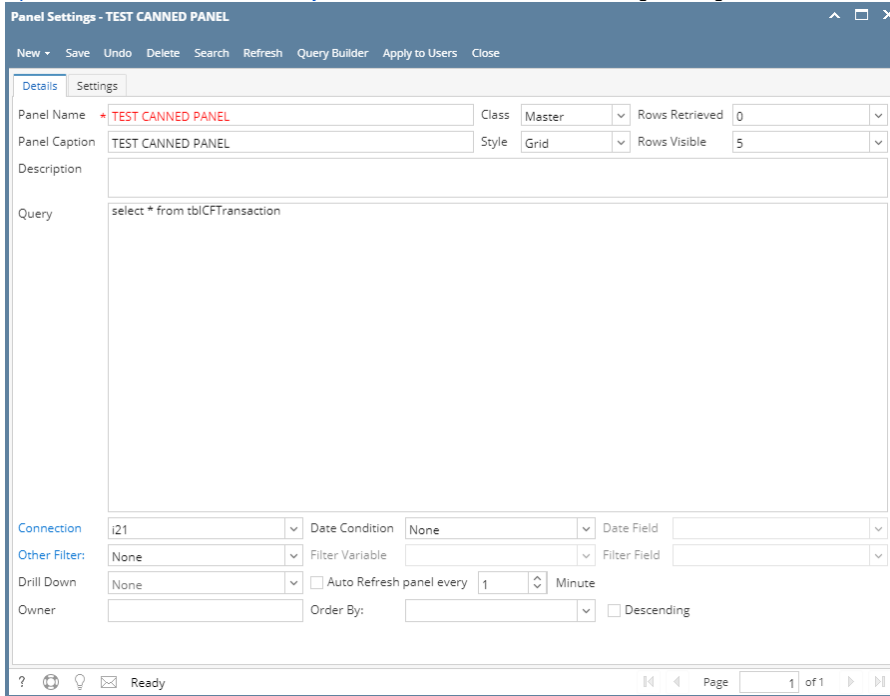


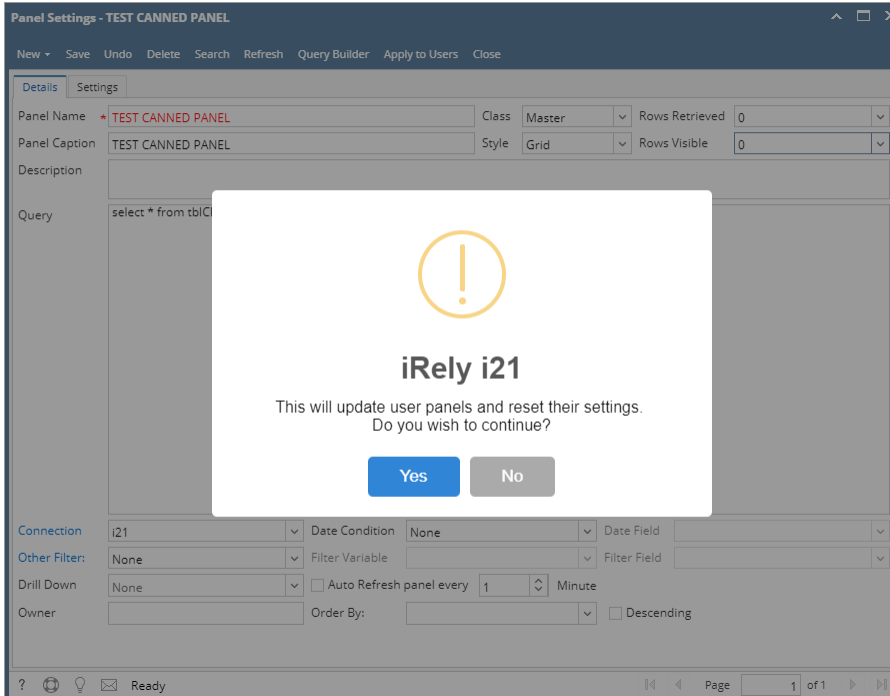
How to Update User Panel - Canned Panel Copy

Through Panel Settings > Apply to Users:

1. [Activate a Canned Panel](#).
2. [Open the Canned Panel and modify](#). Hit **Save** button and **OK** on warning message.

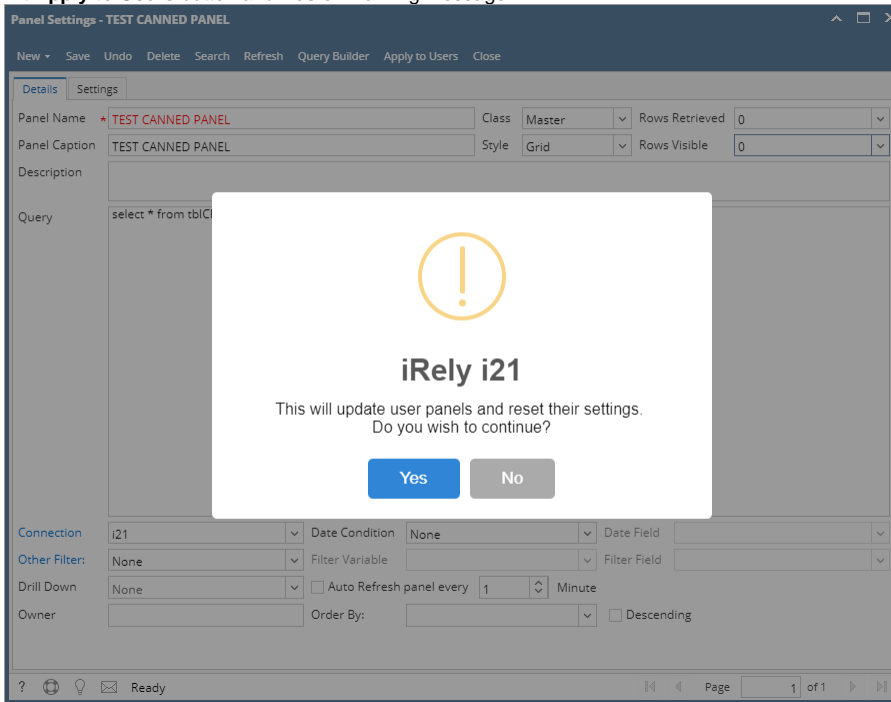


The screenshot shows the 'Panel Settings - TEST CANNED PANEL' window. The 'Details' tab is active. The 'Panel Name' is 'TEST CANNED PANEL', 'Class' is 'Master', 'Rows Retrieved' is '0', 'Panel Caption' is 'TEST CANNED PANEL', 'Style' is 'Grid', and 'Rows Visible' is '5'. The 'Query' field contains 'select * 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, and 'Owner' is empty. The 'Order By' is empty and 'Descending' is unchecked. The status bar at the bottom shows 'Ready' and 'Page 1 of 1'.

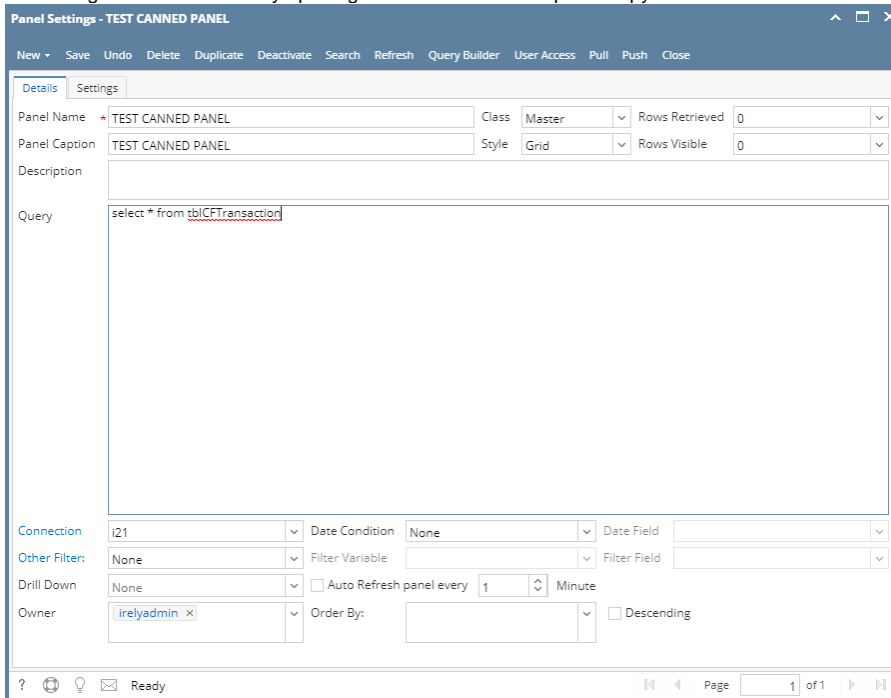


The screenshot shows the same 'Panel Settings - TEST CANNED PANEL' window, but with a warning dialog box overlaid. The dialog box has a yellow exclamation mark icon and the text 'iRely i21'. Below the text, it says 'This will update user panels and reset their settings. Do you wish to continue?'. There are two buttons: 'Yes' (blue) and 'No' (grey). The background window is dimmed, showing the same settings as the previous screenshot.

3. Hit **Apply to Users** button and **Yes** on warning message.



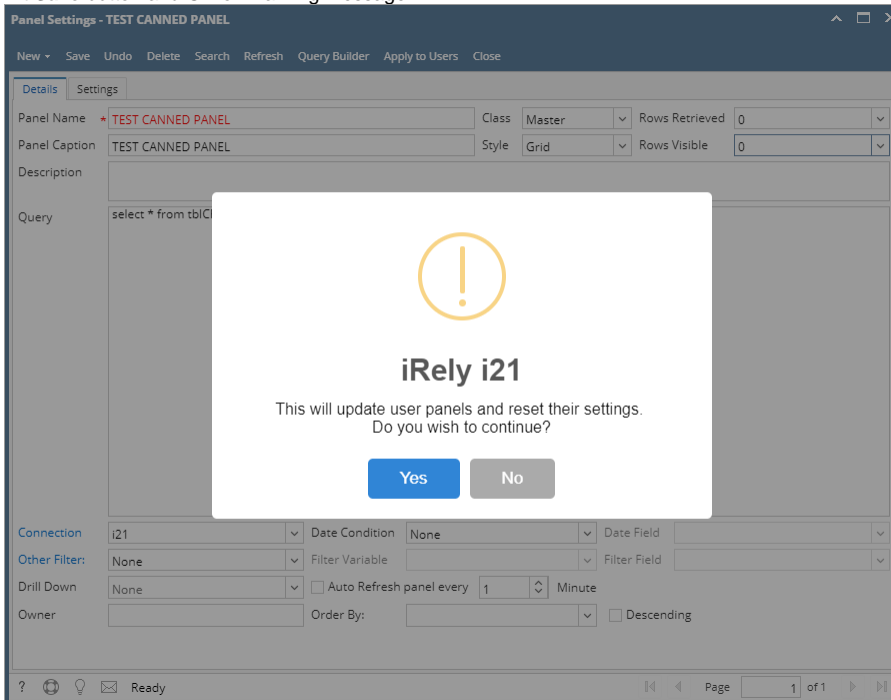
4. The changes can be verified by opening the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.



Through Panel Settings > Pull:

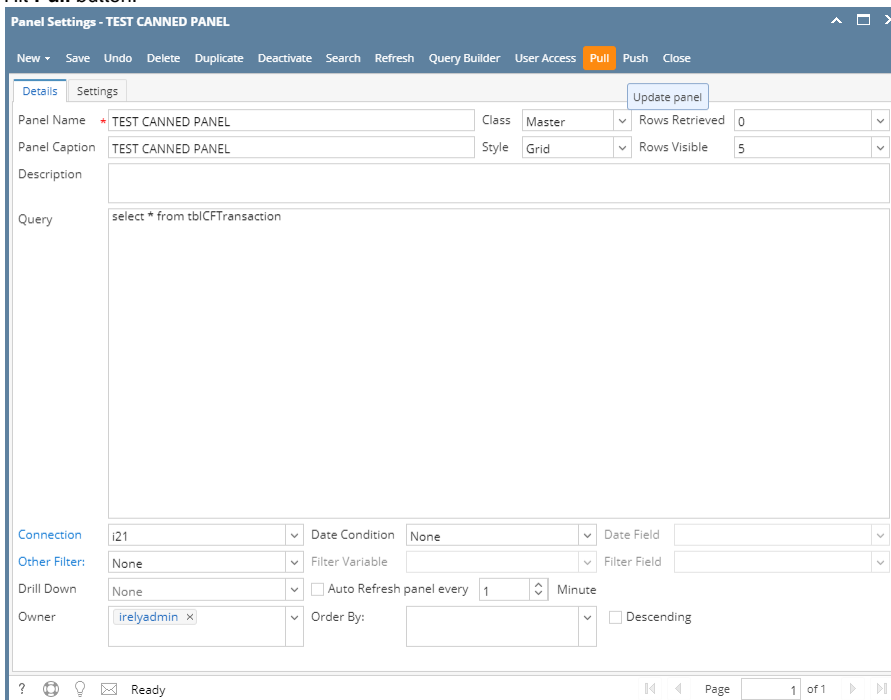
1. Provided that the **Canned Panel has been modified already.**

2. Hit **Save** button and **OK** on warning message.



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

4. Hit **Pull** button.



5. Changes on the canned panel will be pulled.

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: 0

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

? Ready Page 1 of 1

Through Dashboard > New Canned Panel Version Indicator:

1. Activate a canned panel and display it on dashboard.

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: 10

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

? Ready Page 1 of 1

2. Modify a 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: 0

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

? Ready Page 1 of 1

3. Once modified close the Panel Settings and Panel List.
4. Log out on i21 and re-login.
5. From Dashboard main menu, click Display Dashboard button to populate the tabs.
6. Go to the tab where canned panel copy is placed. Noticed the **indicator**. This is a mark that the panel is outdated.

TEST CANNED PANEL

A new copy of your panel is available. Click the update.

IntTransact	tblQuantity	tblmTransact	tblCalculated	tblCalculated	tblCalculated	tblInvalid
2	11	3/4/2016	\$0.00	\$0.00	\$0.00	No
3	10	3/4/2016	\$0.00	\$0.00	\$0.00	No
4	3.5	3/4/2016	\$0.00	\$0.00	\$0.00	No
5	52	3/4/2016	\$0.00	\$0.00	\$0.00	No
6	27.2	3/4/2016	\$0.00	\$0.00	\$0.00	No
7	10	3/7/2016	\$0.00	\$0.00	\$0.00	No
8	140	3/7/2016	\$0.00	\$0.00	\$0.00	No
9	20.1	4/1/2016	\$0.00	\$0.00	\$0.00	No
10	25	4/1/2016	\$0.00	\$0.00	\$0.00	No
11	15.5	4/1/2016	\$0.00	\$0.00	\$0.00	No
			\$0.00	\$0.00	\$0.00	

7. Hit the indicator and select **Yes** on warning message.

TEST CANNED PANEL

A new copy of your panel is available. Click the update.

IntTransact	tblQuantity	tblmTransact	tblCalculated	tblCalculated	tblCalculated	tblInvalid
2	11	3/4/2016	\$0.00	\$0.00	\$0.00	No
3	10	3/4/2016	\$0.00	\$0.00	\$0.00	No
4	3.5	3/4/2016	\$0.00	\$0.00	\$0.00	No
5	52	3/4/2016	\$0.00	\$0.00	\$0.00	No
6	27.2	3/4/2016	\$0.00	\$0.00	\$0.00	No
7	10	3/7/2016	\$0.00	\$0.00	\$0.00	No
8	140	3/7/2016	\$0.00	\$0.00	\$0.00	No
9	20.1	4/1/2016	\$0.00	\$0.00	\$0.00	No
10	25	4/1/2016	\$0.00	\$0.00	\$0.00	No
11	15.5	4/1/2016	\$0.00	\$0.00	\$0.00	No
			\$0.00	\$0.00	\$0.00	

iRely i21

This will update your panel and reset its settings.
Do you wish to continue?

Yes No

8. Dashboard Panel will get updated.

TEST CANNED PANEL						
intTransact	dbiQuantity	dmiTransact	dbiCalculated	dbiCalculated	dbiCalculated	ysnInvalid
2	11	3/4/2016	\$0.00	\$0.00	\$0.00	No
3	10	3/4/2016	\$0.00	\$0.00	\$0.00	No
4	3.5	3/4/2016	\$0.00	\$0.00	\$0.00	No
5	52	3/4/2016	\$0.00	\$0.00	\$0.00	No
6	27.2	3/4/2016	\$0.00	\$0.00	\$0.00	No
7	10	3/7/2016	\$0.00	\$0.00	\$0.00	No
8	140	3/7/2016	\$0.00	\$0.00	\$0.00	No
9	20.1	4/1/2016	\$0.00	\$0.00	\$0.00	No
10	25	4/1/2016	\$0.00	\$0.00	\$0.00	No
11	15.5	4/1/2016	\$0.00	\$0.00	\$0.00	No
12	9.2	4/1/2016	\$0.00	\$0.00	\$0.00	No
13	15.8	4/11/2016	\$0.00	\$0.00	\$0.00	No
14	15	6/29/2016	\$0.00	\$0.00	\$0.00	No
15	50	6/29/2016	\$0.00	\$0.00	\$0.00	No
16	30	7/22/2016	\$0.00	\$0.00	\$0.00	No
17	41.2	7/25/2016	\$0.00	\$0.00	\$0.00	No
18	15.85	7/25/2016	\$0.00	\$0.00	\$0.00	No
19	21.02	7/25/2016	\$0.00	\$0.00	\$0.00	No
20	6.58	7/26/2016	\$0.00	\$0.00	\$0.00	No
21	10.25	7/26/2016	\$0.00	\$0.00	\$0.00	Yes
22	12.6	7/25/2016	\$0.00	\$0.00	\$0.00	No
23	15.68	7/26/2016	\$0.00	\$0.00	\$0.00	No
24	15.86	10/21/2016	\$0.00	\$0.00	\$0.00	No
25	14.48	10/1/2016	\$0.00	\$0.00	\$0.00	No
26	14.28	10/11/2016	\$0.00	\$0.00	\$0.00	No
27	13.78	10/18/2016	\$0.00	\$0.00	\$0.00	No
28	15.27	10/27/2016	\$0.00	\$0.00	\$0.00	No

9. Check the changes by opening the activated canned panel copy on **Panel List > Active Panels** by hitting **Open** button.

Panel Settings - TEST CANNED PANEL

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

Details Settings

Panel NameTEST CANNED PANELClassMasterRows Retrieved0

Panel CaptionTEST CANNED PANELStyleGridRows Visible0

Description

Queryselect * from tblCFTransaction

Connectioni21Date ConditionNoneDate Field

Other Filter:NoneFilter VariableFilter Field

Drill DownNoneAuto Refresh panel every1Minute

OwnerirelyadminOrder ByDescending

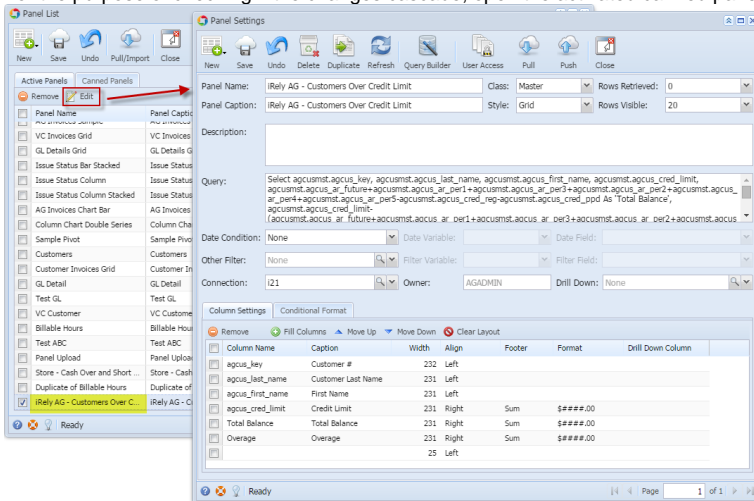
Page1 of 1

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

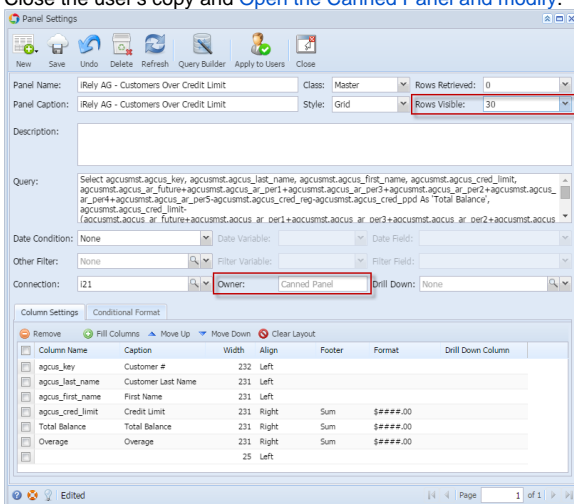
Through Panel Settings > Apply to Users:

1. Activate a Canned Panel.

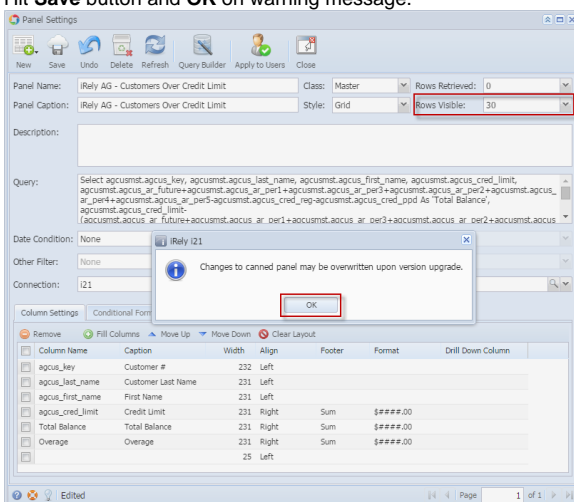
2. For the purpose of checking if the changes cascade, open the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.



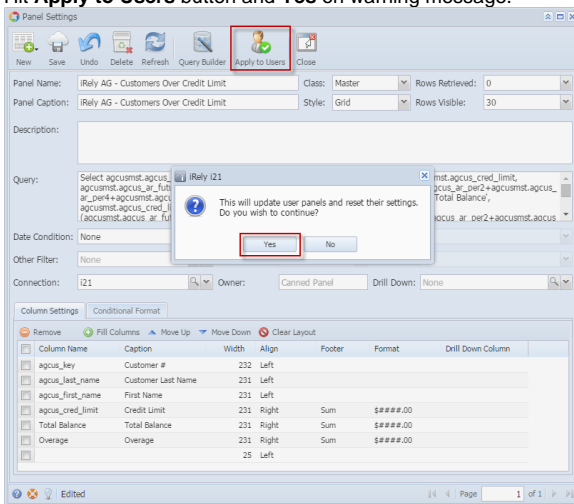
3. Close the user's copy and **Open the Canned Panel** and modify.



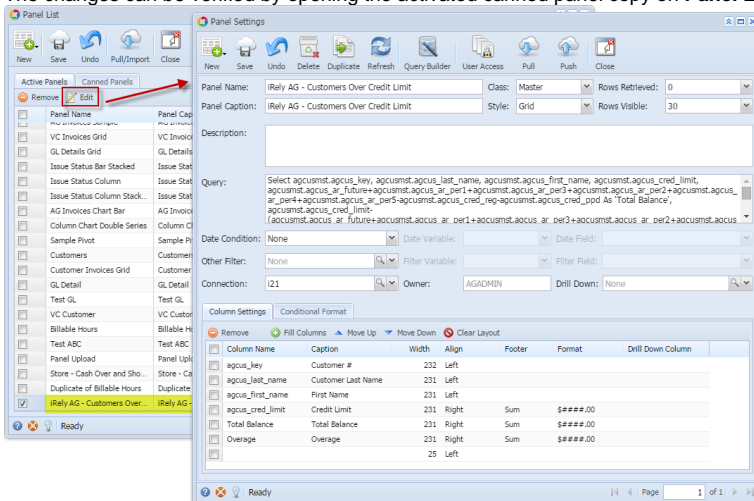
4. Hit **Save** button and **OK** on warning message.



5. Hit **Apply to Users** button and **Yes** on warning message.

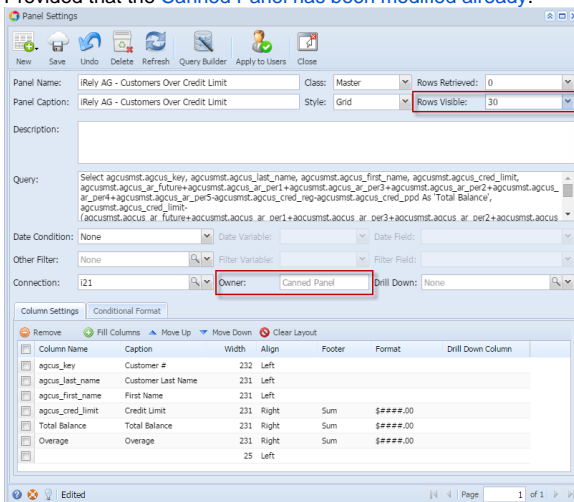


6. The changes can be verified by opening the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.

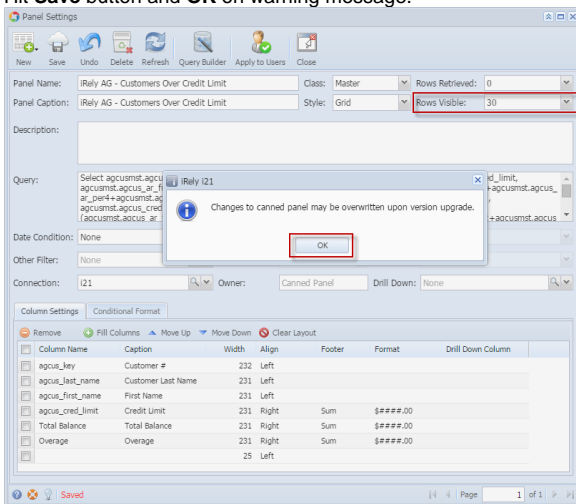


Through **Panel Settings > Pull**:

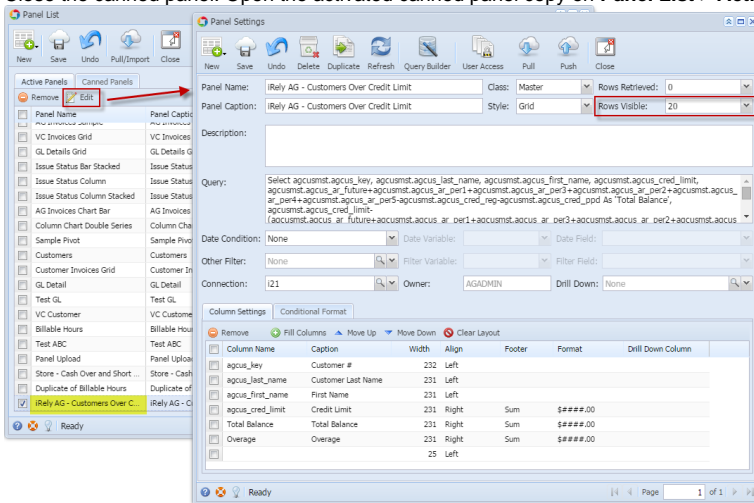
1. Provided that the **Canned Panel** has been modified already.



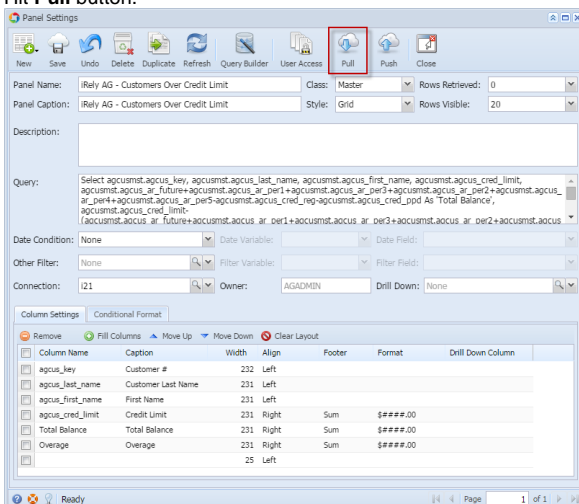
2. Hit **Save** button and **OK** on warning message.



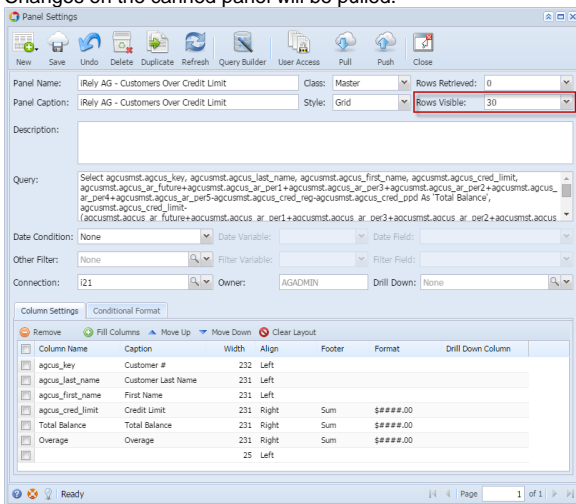
3. Close the canned panel. Open the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.



4. Hit **Pull** button.

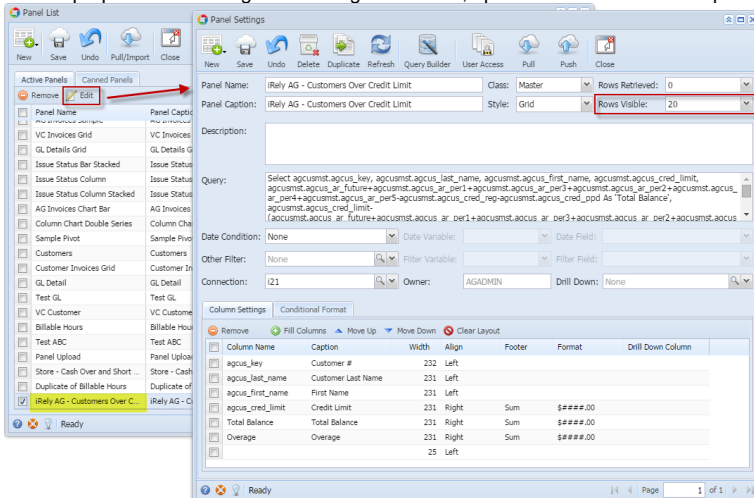


5. Changes on the canned panel will be pulled.

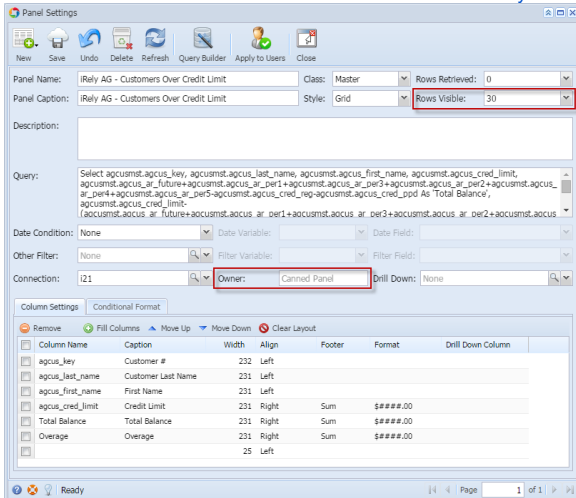


Through Panel List > Apply to Users:

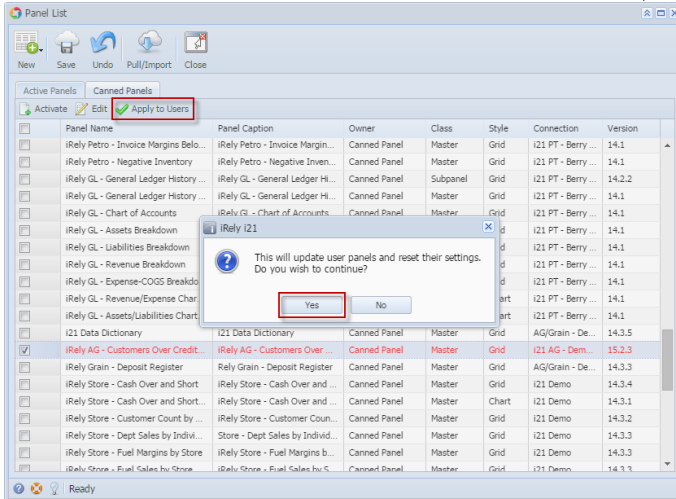
1. For the purpose of checking if the changes cascade, open the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.



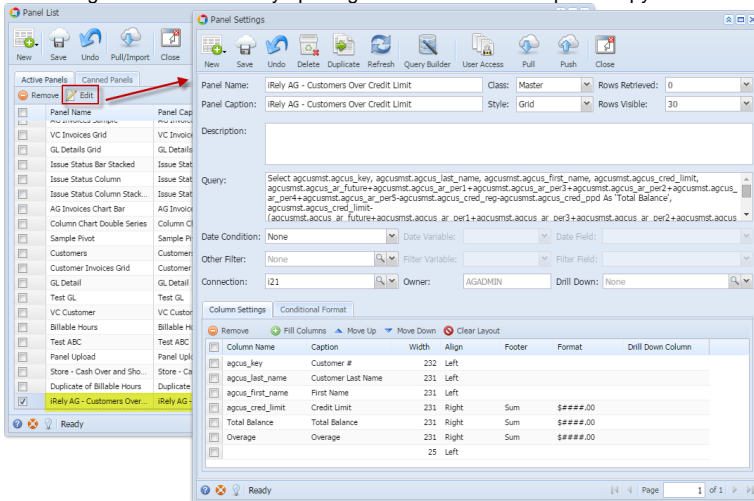
2. Provided that the **Canned Panel has been modified already.**



- Close the Canned Panel and on **Panel List** screen > **Canned Panel** tab, hit **Apply to Users** button and select **Yes** on warning message.



- The changes can be verified by opening the activated canned panel copy on **Panel List** > **Active Panels** by hitting **Edit** button.



Through Dashboard > New Canned Panel Version Indicator:

1. Activate a canned panel and display it on dashboard.

The screenshot shows the iRely i21 - iRely Grain and Ag Co dashboard. The main panel displays a table titled "Relay AG - Customers Over Credit Limit". The table has columns for Customer #, Customer Last Name, First Name, Credit Limit, Total Balance, and Overage. The data is sorted by Customer # in descending order.

Customer #	Customer Last Name	First Name	Credit Limit	Total Balance	Overage
000010660	AGACUST	AGACUST	10.00	10.00	0.00
000010876	AGACUST	AGACUST	10.00	10.00	0.00
000010880	AGACUST	AGACUST	10.00	10.00	0.00
000010900	AGACUST	AGACUST	10.00	10.00	0.00
000012950	AGACUST	AGACUST	10.00	10.00	0.00
000012950	AGACUST	AGACUST	10.00	10.00	0.00
0000129240	AGACUST	AGACUST	10.00	10.00	0.00
0000143159	AGACUST	AGACUST	10.00	10.00	0.00
0000144970	AGACUST	AGACUST	10.00	10.00	0.00
000014650	AGACUST	AGACUST	10.00	10.00	0.00
000014685	AGACUST	AGACUST	10.00	10.00	0.00
0000146325	AGACUST	AGACUST	10.00	10.00	0.00
0000152500	AGACUST	AGACUST	10.00	10.00	0.00
000016065	AGACUST	AGACUST	10.00	10.00	0.00
0000181360	AGACUST	AGACUST	10.00	10.00	0.00
0000189425	AGACUST	AGACUST	10.00	10.00	0.00
0000189500	AGACUST	AGACUST	10.00	10.00	0.00
0000195100	AGACUST	AGACUST	10.00	10.00	0.00
0000195142	AGACUST	AGACUST	10.00	10.00	0.00

Original setup:

The screenshot shows the Panel Settings dialog box for the "Relay AG - Customers Over Credit Limit" panel. The panel name is "Relay AG - Customers Over Credit Limit", the class is "Master", and the rows retrieved are 0. The panel caption is "Relay AG - Customers Over Credit Limit", the style is "Grid", and the rows visible are 20. The description is empty. The query is a complex SQL statement. The date condition is "None", the date variable is empty, and the date field is empty. The other filter is "None", the filter variable is empty, and the filter field is empty. The connection is "i21", the owner is "AGADMIN", and the drill down is "None". The column settings table is as follows:

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			

2. Modify a canned panel.

The screenshot shows the Panel Settings dialog box for the "Relay AG - Customers Over Credit Limit" panel, showing modifications. The panel name is "Relay AG - Customers Over Credit Limit", the class is "Master", and the rows retrieved are 0. The panel caption is "Relay AG - Customers Over Credit Limit", the style is "Grid", and the rows visible are 30. The description is empty. The query is a complex SQL statement. The date condition is "None", the date variable is empty, and the date field is empty. The other filter is "None", the filter variable is empty, and the filter field is empty. The connection is "i21", the owner is "Canned Panel", and the drill down is "None". The column settings table is as follows:

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			

3. Once modified close the Panel Settings and Panel List.
4. Log out on i21 and re-login.
5. From Dashboard main menu, click Display Dashboard button to populate the tabs.

6. Go to the tab where canned panel copy is placed. Noticed the **indicator**. This is a mark that the panel is outdated.

The screenshot shows the 'iRely AG - Customers Over Credit Limit' panel. A red box highlights a small icon in the top left corner of the panel header, which is the indicator mentioned in the instructions.

Customer #	Customer Last Name	First Name	Credit Limit	Total Balance	Overage
0000100600	A W H FARMS	JAMES	\$5,000.00	\$5,546.66	-\$1,546.66
0000108975	ANTHONY	JAMES	\$1.00	\$98.31	-\$97.31
0000109800	APPLIGATE	BYRON	\$1.00	\$1.22	-\$0.22
0000109080	ARNERLUSTER	DALE	\$250.00	\$945.84	-\$695.84
0000125500	BARRON	RUTH	\$0.00	\$149.31	-\$149.31
0000129150	BEARD	STEVEN A	\$250.00	\$1,332.93	-\$1,082.93
0000129240	BEARMAN	TONI	\$2,000.00	\$3,490.49	-\$1,490.49
0000143159	BOHMEN	MARY	\$0.00	\$871.85	-\$871.85
0000144970	BRACHMUELLER	DOUGLAS L	\$5,000.00	\$5,729.48	-\$729.48
0000146050	BREMER	DANNY	\$1,000.00	\$19,231.71	-\$18,231.71
0000146885	BROOKFIELD SAND & GRAVEL	DANNY	\$20,000.00	\$20,840.06	-\$840.06
0000148325	BLUM	RICH	\$250.00	\$386.47	-\$136.47
0000152500	BOWERS	DOYLE	\$0.00	\$825.72	-\$825.72
0000180085	C W FARMS LLC	DOYLE	\$7,500.00	\$9,229.91	-\$1,729.91
0000181360	CEDAR CREEK GOLF CLUB	DOYLE	\$1,000.00	\$1,354.95	-\$354.95
0000189425	CLIFFORD FARMS - VALPO	DOYLE	\$0.00	\$322.49	-\$322.49
0000189500	COVERDALE FARMS	DOYLE	\$0.00	\$374.71	-\$374.71
0000195100	COLLIER	MARK	\$0.00	\$386.52	-\$386.52
0000195142	COLLINS	ANITA	\$500.00	\$840.16	-\$340.16
			\$508,438.00	\$1,209,315.37	-\$700,877.37

7. Hit the indicator and select **Yes** on warning message.

The screenshot shows the same panel as before, but a warning message dialog box is displayed in the center. The dialog box contains the text: "This will update your panel and reset its settings. Do you wish to continue?" with "Yes" and "No" buttons. The "Yes" button is highlighted with a red box.

8. Dashboard Panel will get updated.

The screenshot shows the 'iRely AG - Customers Over Credit Limit' panel after the update. The data is the same as in the previous screenshot, but the panel now includes a 'Logistics' section at the bottom, which was not present before.

Customer #	Customer Last Name	First Name	Credit Limit	Total Balance	Overage
0000100600	A W H FARMS	JAMES	\$5,000.00	\$5,546.66	-\$1,546.66
0000108975	ANTHONY	JAMES	\$1.00	\$98.31	-\$97.31
0000109800	APPLIGATE	BYRON	\$1.00	\$1.22	-\$0.22
0000109080	ARNERLUSTER	DALE	\$250.00	\$945.84	-\$695.84
0000125500	BARRON	RUTH	\$0.00	\$149.31	-\$149.31
0000129150	BEARD	STEVEN A	\$250.00	\$1,332.93	-\$1,082.93
0000129240	BEARMAN	TONI	\$2,000.00	\$3,490.49	-\$1,490.49
0000143159	BOHMEN	MARY	\$0.00	\$871.85	-\$871.85
0000144970	BRACHMUELLER	DOUGLAS L	\$5,000.00	\$5,729.48	-\$729.48
0000146050	BREMER	DANNY	\$1,000.00	\$19,231.71	-\$18,231.71
0000146885	BROOKFIELD SAND & GRAVEL	DANNY	\$20,000.00	\$20,840.06	-\$840.06
0000148325	BLUM	RICH	\$250.00	\$386.47	-\$136.47
0000152500	BOWERS	DOYLE	\$0.00	\$825.72	-\$825.72
0000180085	C W FARMS LLC	DOYLE	\$7,500.00	\$9,229.91	-\$1,729.91
0000181360	CEDAR CREEK GOLF CLUB	DOYLE	\$1,000.00	\$1,354.95	-\$354.95
0000189425	CLIFFORD FARMS - VALPO	DOYLE	\$0.00	\$322.49	-\$322.49
0000189500	COVERDALE FARMS	DOYLE	\$0.00	\$374.71	-\$374.71
0000195100	COLLIER	MARK	\$0.00	\$386.52	-\$386.52
0000195142	COLLINS	ANITA	\$500.00	\$840.16	-\$340.16
0000194215	CONNER	MICHAEL	\$1.00	\$124.47	-\$123.47
0000204000	COX	ANDY	\$1.00	\$872.42	-\$871.42
0000213325	DR LUBRICANTS INC	ANDY	\$1,000.00	\$1,382.89	-\$382.89
0000216881	RD DELAUNCEY LLC	ANDY	\$0.00	\$21,291.16	-\$21,291.16
0000216975	DELAUNCEY	ANDREW	\$8,000.00	\$8,713.46	-\$713.46
0000217610	WAI DELAUNCEY FARMS LLC	ANDREW	\$20,000.00	\$20,106.34	-\$106.34
0000218295	DEPITY	MATT	\$1.00	\$129.61	-\$128.61
0000218770	DECKHOFF	JOSEPH	\$0.00	\$112.82	-\$112.82
0000242200	DEE ROVER VALLEY FARM	JOSEPH	\$0.00	\$12,844.93	-\$12,844.93
0000242280	EDOU FARMS INC	JOSEPH	\$0.00	\$160.03	-\$160.03
			\$508,438.00	\$1,209,315.37	-\$700,877.37

9. Check the changes by opening the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.

The screenshot shows two windows: 'Panel List' and 'Panel Settings'. The 'Panel List' window shows a list of active panels, with 'iRely AG - Customers Over Credit Limit' selected. The 'Panel Settings' window shows the configuration for this panel, including the panel name, caption, style, and a query. The 'Edit' button in the 'Panel List' window is highlighted with a red box.

Panel List:

- Active Panels: iRely AG - Customers Over Credit Limit
- Panel Name: iRely AG - Customers Over Credit Limit
- Panel Caption: iRely AG - Customers Over Credit Limit
- Style: Grid
- Rows Retrieved: 0
- Rows Visible: 30

Panel Settings:

- Panel Name: iRely AG - Customers Over Credit Limit
- Panel Caption: iRely AG - Customers Over Credit Limit
- Style: Grid
- Rows Retrieved: 0
- Rows Visible: 30
- Query: Select agcustmt.agcust_key, agcustmt.agcust_last_name, agcustmt.agcust_first_name, agcustmt.agcust_cred_limit, agcustmt.agcust_ar_future+agcustmt.agcust_ar_per1+agcustmt.agcust_ar_per2+agcustmt.agcust_ar_per3+agcustmt.agcust_ar_per4+agcustmt.agcust_ar_per5+agcustmt.agcust_cred_rep+agcustmt.agcust_cred_port as Total Balance, agcustmt.agcust_cred_limit, (agcustmt.agcust_ar_future+agcustmt.agcust_ar_per1+agcustmt.agcust_ar_per2+agcustmt.agcust_ar_per3+agcustmt.agcust_ar_per4+agcustmt.agcust_ar_per5+agcustmt.agcust_cred_rep+agcustmt.agcust_cred_port as Total Balance)
- Date Condition: None
- Other Filter: None
- Connection: I21
- Owner: AGADMIN
- Drill Down: None
- Column Settings: agcustmt.agcust_key, agcustmt.agcust_last_name, agcustmt.agcust_first_name, agcustmt.agcust_cred_limit, agcustmt.agcust_cred_limit, Total Balance, Overage

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

