

# How to Activate Canned Panel

Canned Panel can only be viewed by **Administrator Dashboard Role** users. This can be accessed through **Panel List**, under the **Canned Panels Tab**.

Panel List					
New Open Refresh Export Close					
Active Panels		Canned Panels			
Activate	Layout	Filter Records (F3)	104 record(s)		
	Panel Name	Panel Caption	Owner	Class	Style
<input type="checkbox"/>	i21 AP - Unposted Payables	i21 AP - Unposted Payables	Canned Panel	Master	Grid
<input type="checkbox"/>	i21 Dashboard - Active Panel Users	i21 Dashboard - Active Panel Users	Canned Panel	Master	Grid
<input type="checkbox"/>	i21 Data Dictionary - Column List	i21 Data Dictionary - Column List	Canned Panel	Subpanel	Grid
<input type="checkbox"/>	i21 Data Dictionary - Table List	i21 Data Dictionary - Table List	Canned Panel	Master	Grid
<input type="checkbox"/>	i21 General Ledger - Asset Breakdown	i21 General Ledger - Asset Breakdown	Canned Panel	Master	Grid
<input type="checkbox"/>	i21 General Ledger - Assets Monthly	i21 General Ledger - Assets Monthly	Canned Panel	Master	Chart
<input type="checkbox"/>	i21 General Ledger - Chart of Accounts	i21 General Ledger - Chart of Accounts	Canned Panel	Master	Grid

To be able to use the canned panel on dashboard, the user needs to activate it first. Here's how:

- 1. Open Canned Panel.
- 2. Click **Activate** button.

Panel Settings - i21 AP - Unposted Payables

New Save Undo Delete **Activate** Search Refresh Query Builder Apply to Users Close

Details Settings

Panel Name i21 AP - Unposted Payables Class Master Rows Retrieved 0

Panel Caption i21 AP - Unposted Payables Style Grid Rows Visible 5

Description

Query

select tblIEMEntityCredential.strUserName as Employee, strVendorid as Vendor, tblAPBill.dtmDate as GLDate, tblAPBill.dtmBillDate as BillDate, tblAPBill.dtmDueDate as DueDate, strVendorOrderNumber as InvoiceNumber, tblAPBillDetail.dbiTotal as ItemTotal, tblAPBillDetail.strMiscDescription as Item, tblGLAccount.strAccountid as Account, tblGLAccount.strDescription as AccountDesc, dbiAmountDue as Due from tblAPBillDetail inner join tblAPBill on tblAPBillDetail.intBillid = tblAPBill.intBillid inner join tblAPVendor on tblAPBill.intEntityVendorid = tblAPVendor.intEntityVendorid inner join tblGLAccount on tblAPBillDetail.intAccountid = tblGLAccount.intAccountid inner join tblIEMEntityCredential on tblAPBill.intEntityid = tblIEMEntityCredential.intEntityid where ysnPosted = 0

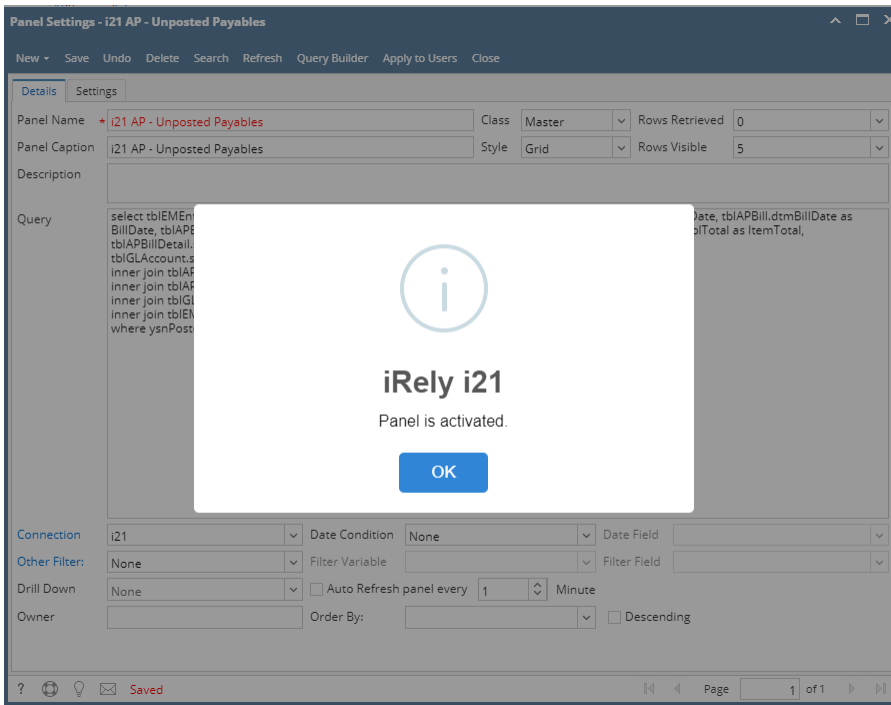
Connection i21 Date Condition None Date Field

Other Filter: None Filter Variable Filter Field

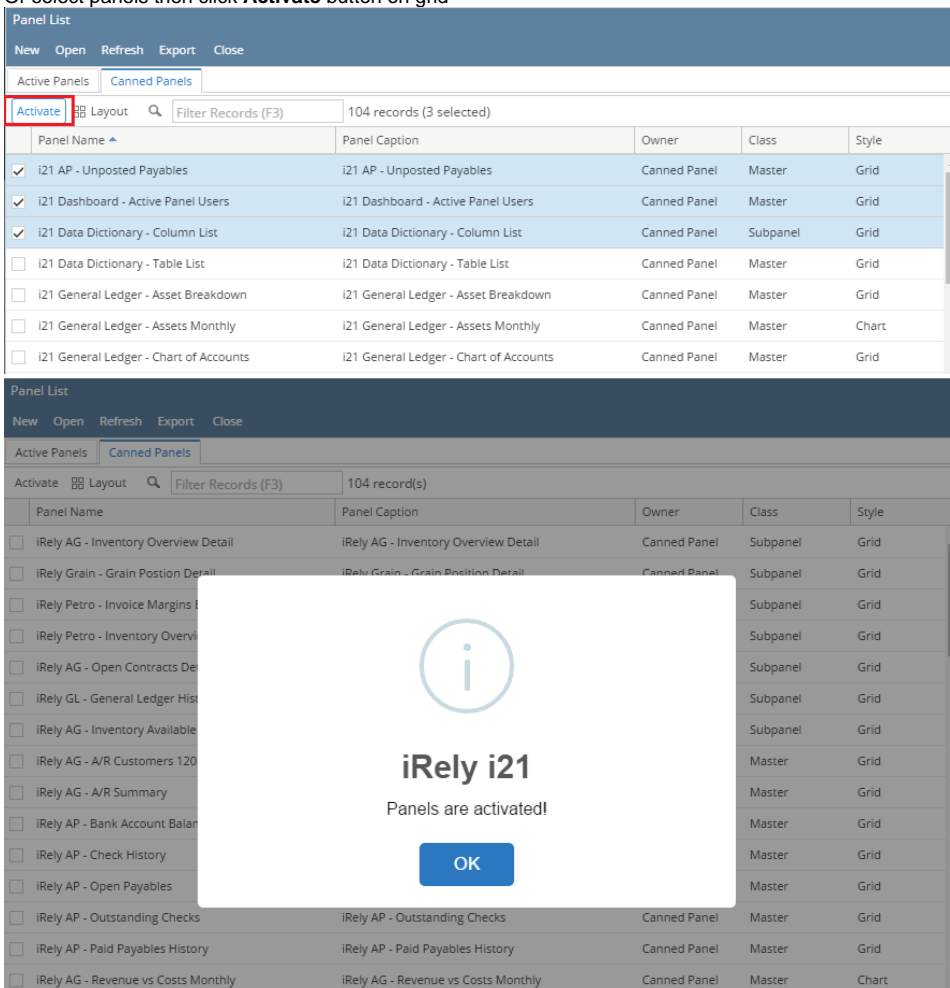
Drill Down: None ☐ Auto Refresh panel every 1 Minute

Owner Order By: ☐ Descending

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### 3. Or select panels then click **Activate** button on grid



4. Panel Name's font will turn **red**.

**Panel Settings - i21 AP - Unposted Payables**

New Save Undo Delete Search Refresh Query Builder Apply to Users Close

Details Settings

Panel Name **i21 AP - Unposted Payables** Class Master Rows Retrieved 0

Panel Caption i21 AP - Unposted Payables Style Grid Rows Visible 5

Description

Query

```
select tblEMEntityCredential.strUserName as Employee, strVendorId as Vendor, tblAPBill.dtmDate as GLDate, tblAPBill.dtmBillDate as BillDate, tblAPBill.dtmDueDate as DueDate, strVendorOrderNumber as InvoiceNumber, tblAPBillDetail.dbiTotal as ItemTotal, tblAPBillDetail.strMiscDescription as Item, tblGLAccount.strAccountid as Account, tblGLAccount.strDescription as AccountDesc, dbiAmountDue as Due from tblAPBillDetail inner join tblAPBill on tblAPBillDetail.intBillid = tblAPBill.intBillid inner join tblAPVendor on tblAPBill.intEntityVendorid = tblAPVendor.intEntityVendorid inner join tblGLAccount on tblAPBillDetail.intAccountid = tblGLAccount.intAccountid inner join tblEMEntityCredential on tblAPBill.intEntityid = tblEMEntityCredential.intEntityid where ysnPosted = '0'
```

Connection i21 Date Condition None Date Field

Other Filter: None Filter Variable Filter Field

Drill Down None ☐ Auto Refresh panel every 1 Minute

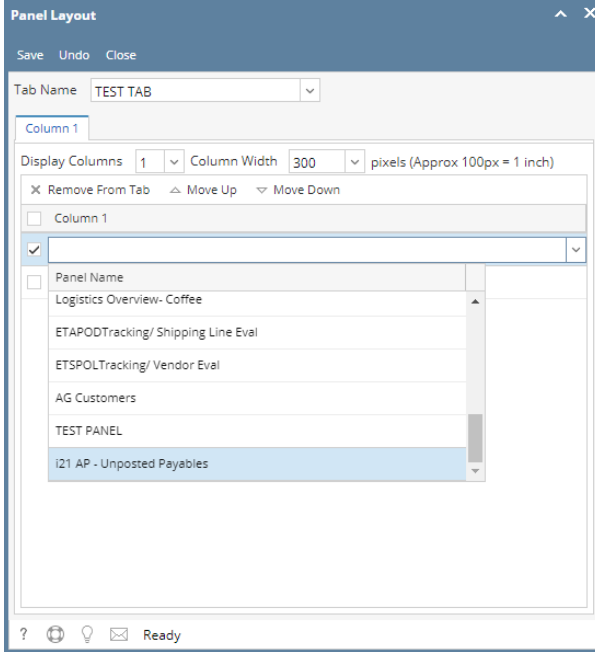
Owner Order By: ☐ Descending

? Saved Page 1 of 1

5. Copy of the canned panel will be available on the **Active Panels** tab. Owner of the canned panel copy becomes the user currently logged.

Panel List								
Open New Import Refresh Report								
Active Panels Canned Panels								
View	Filter (F3)	18 record(s) (1 selected)						
Panel Name	Panel Caption	Owner	Class	Style	Connection	Version	Panel Access	
<input type="checkbox"/> i21 General Ledger - Char...	i21 General Ledger - Char...	ireljadmin	Master	Grid	i21	16.1	<input checked="" type="checkbox"/>	
<input type="checkbox"/> i21 General Ledger - GL H...	i21 General Ledger - GL H...	ireljadmin	Master	Grid	i21	15.4	<input checked="" type="checkbox"/>	
<input type="checkbox"/> i21 General Ledger - GL S...	i21 General Ledger - GL S...	ireljadmin	Master	Grid	i21	15.4	<input checked="" type="checkbox"/>	
<input type="checkbox"/> i21 General Ledger - Liabl...	i21 General Ledger - Liabl...	ireljadmin	Master	Grid	i21	14.1.4	<input checked="" type="checkbox"/>	
<input type="checkbox"/> i21 General Ledger - Liabl...	i21 General Ledger - Liabl...	ireljadmin	Master	Chart	i21	14.1.5	<input checked="" type="checkbox"/>	
<input type="checkbox"/> i21 General Ledger - Reve...	i21 General Ledger - Reve...	ireljadmin	Master	Grid	i21	14.1.6	<input checked="" type="checkbox"/>	
<input type="checkbox"/> i21 General Ledger - Reve...	i21 General Ledger - Reve...	ireljadmin	Master	Chart	i21	14.1.5	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Sales Order by Type	Sales Order by Type	ireljadmin	Master	Chart	i21	16.1.3	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Profit / Loss by Allocation	Profit / Loss by Allocation	jbalachander	Master	Grid	i21	17.1.6	<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"/> Vendor Performance - Sh...	Vendor Performance - Sh...	jbalachander	Master	Chart	i21	17.1.5	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Contract Overview	Logistics Overview- Coffee	ireljadmin	Master	Grid	i21	17.1.4	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Logistics Overview- Coffee	Logistics Overview- Coffee	ireljadmin	Master	Grid	i21	17.1.3	<input checked="" type="checkbox"/>	
<input type="checkbox"/> ETAPODTracking/ Shippin...	ETAPODTracking/ Shippin...	ireljadmin	Master	Grid	i21	17.1	<input checked="" type="checkbox"/>	
<input type="checkbox"/> ETSPOLTracking/ Vendor ...	ETSPOLTracking/ Vendor ...	ireljadmin	Master	Grid	i21	17.1	<input checked="" type="checkbox"/>	
<input type="checkbox"/> AG Customers	AG Customers Caption	ireljadmin	Master	Grid	i21	17.1.2	<input checked="" type="checkbox"/>	
<input type="checkbox"/> TEST PANEL	TEST PANEL	ireljadmin	Master	Grid	i21	17.1.11	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> i21 AP - Unposted Payables	i21 AP - Unposted Payables	ireljadmin	Master	Grid	i21	15.4.2	<input checked="" type="checkbox"/>	

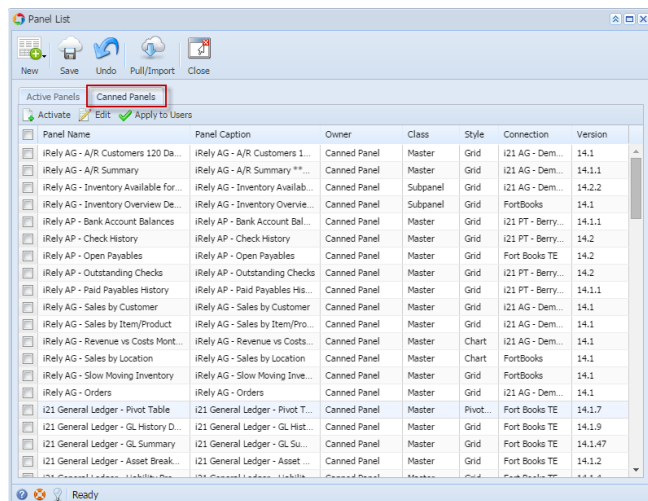
6. This canned panel copy can now be selected on [Panel Layout](#) for a specific tab.



7. And will successfully be shown on dashboard.

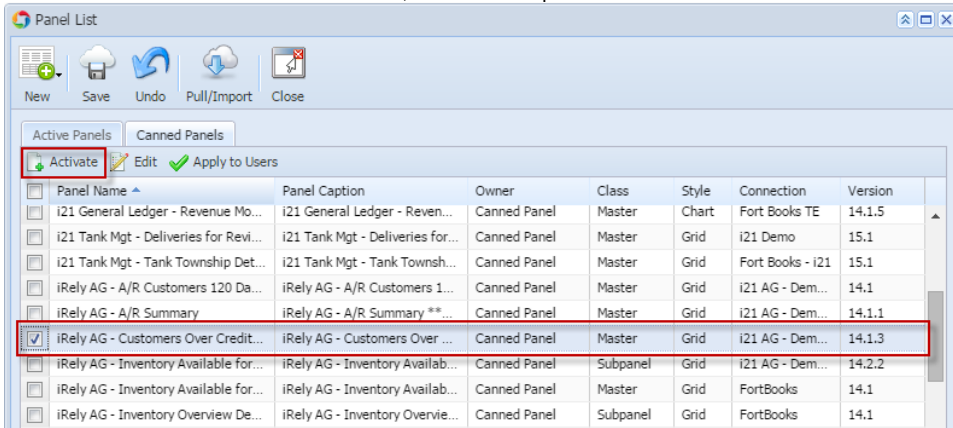
Employee	Vendor	GLDate	BillDate	DueDate	InvoiceNumber	ItemTotal	Item	Account	AccountDesc	Due
Brandon.Tolosa@irely.com	0001000135	11/22/2016	11/22/2016	11/22/2016		\$0.00	21000-0001-000		Pending Accounts Payable - Fort Wayne - Admin	\$0.00
Brandon.Tolosa@irely.com	0001000135	11/22/2016	11/22/2016	11/22/2016		\$38.63	64000-0001-000		Freight Expense - Fort Wayne - Admin	\$0.00
Brandon.Tolosa@irely.com	0001000135	11/22/2016	11/22/2016	11/22/2016		\$0.00	21000-0001-000		Pending Accounts Payable - Fort Wayne - Admin	\$0.00
Brandon.Tolosa@irely.com	0001000135	11/22/2016	11/22/2016	11/22/2016		\$74.99	64000-0001-000		Freight Expense - Fort Wayne - Admin	\$0.00
Brandon.Tolosa@irely.com	0001000135	11/22/2016	11/22/2016	11/22/2016		\$12.50	64000-0001-000		Freight Expense - Fort Wayne - Admin	\$0.00
brlan	000100010	4/19/2016	4/19/2016	5/9/2016	A235445	\$10,312.00	87...	21000-0001-000	Pending Accounts Payable - Fort Wayne - Admin	\$26,312.00
brlan	000100010	4/19/2016	4/19/2016	5/9/2016	A235445	\$10,304.52	87...	21000-0001-000	Pending Accounts Payable - Fort Wayne - Admin	\$26,312.00
brlan	000100010	4/21/2016	4/21/2016	5/11/2016	Inv...	\$720.00	87...	21000-0001-000	Pending Accounts Payable - Fort Wayne - Admin	\$720.00
brlan	000100010	4/27/2016	4/27/2016	5/17/2016	W012345	\$11,414.88	87...	21000-0001-000	Pending Accounts Payable - Fort Wayne - Admin	\$11,414.88
brlan	000100010	5/1/2016	5/1/2016	5/21/2016	CCR-889#	\$5,000.00	Co...	12500-0000-000	Credit Card Receivable - Fort Wayne - Admin	\$10,000.00
brlan	000100010	5/1/2016	5/1/2016	5/21/2016	CCR-889#	\$2,300.00	Co...	12500-0000-000	Credit Card Receivable - Home office - Admin	\$10,000.00
brlan	000100010	5/1/2016	5/1/2016	5/21/2016	CCR-889#	\$2,300.00	Co...	63500-0000-000	Credit Card Pass - Home office - Admin	\$10,000.00
brlan	000100010	5/08/2016	5/08/2016	4/15/2016	1234	\$12,240.00	87...	21000-0001-000	Pending Accounts Payable - Fort Wayne - Admin	\$12,240.00
brlan	NGL	5/19/2016	5/19/2016	5/19/2016		\$575.00	21000-0001-000		Pending Accounts Payable - Fort Wayne - Admin	\$1,050.00
irely.com	000100010	4/21/2016	4/21/2016	4/21/2016		\$14,144.44	110000-0000-000		Warehouse Accounts Payable - Fort Wayne - Admin	\$14,144.44

**Canned Panel** can only be viewed by **Administrator Dashboard Role** users. This can be accessed through **Panel List** screen, under the **Canned Panels Tab**.

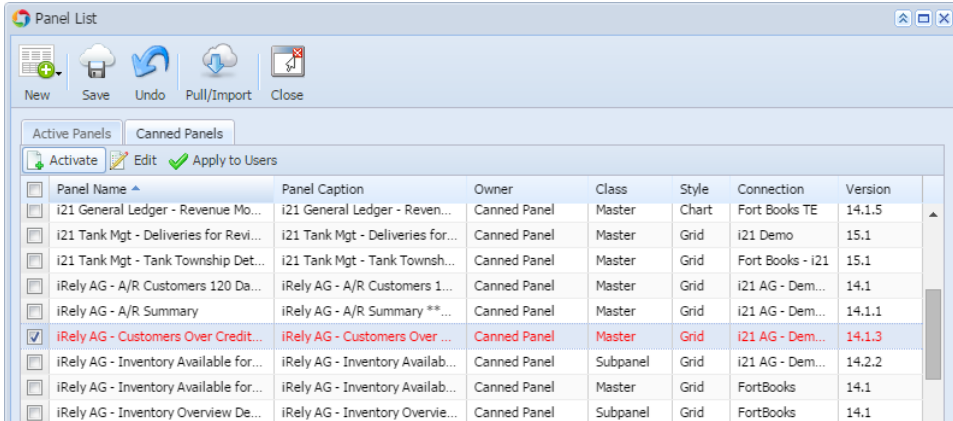


To be able to use the canned panel on dashboard, the user needs to activate it first. Here's how:

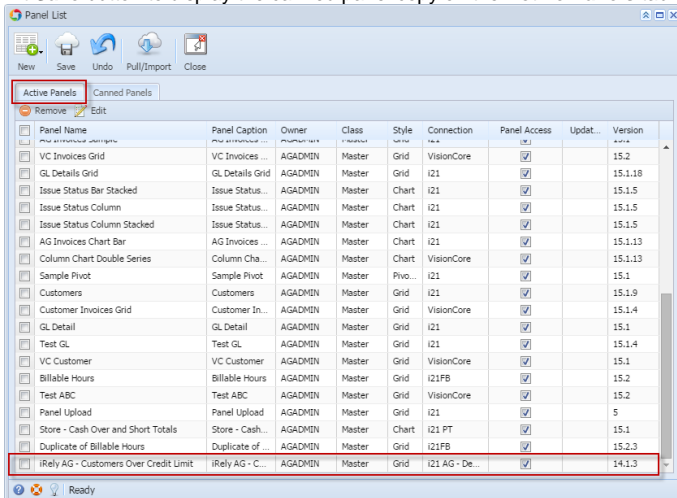
1. From Panel List screen > Canned Panels tab, select canned panel and hit **Activate** button.



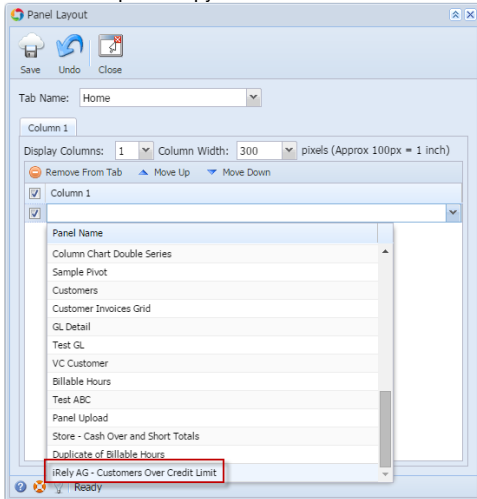
2. The selected row's font will turn **red**.



3. Hit **Save** button to display the canned panel copy on the **Active Panels** tab. Owner of the canned panel copy becomes the user currently logged.



- This canned panel copy can now be selected on [Panel Layout](#) for a specific tab.



- And will successfully be shown on dashboard.

iRely 121 - iRely Grain and Ag Co

Home | Grid | Pivot Grid | Chart | Sample | Sample A | Billable Hours | Randy test2 | Sample B

**iRely AG - Customers Over Credit Limit**

Customer #	Customer Last Name	First Name	Credit Limit	Total Balance	Overage
0000100600	0000100600	0000100600	0000100600	0000100600	0000100600
0000100615	0000100615	0000100615	0000100615	0000100615	0000100615
0000100680	0000100680	0000100680	0000100680	0000100680	0000100680
0000100680	0000100680	0000100680	0000100680	0000100680	0000100680
0000129500	0000129500	0000129500	0000129500	0000129500	0000129500
0000129530	0000129530	0000129530	0000129530	0000129530	0000129530
0000129540	0000129540	0000129540	0000129540	0000129540	0000129540
0000143159	0000143159	0000143159	0000143159	0000143159	0000143159
0000144970	0000144970	0000144970	0000144970	0000144970	0000144970
0000146050	0000146050	0000146050	0000146050	0000146050	0000146050
0000146285	0000146285	0000146285	0000146285	0000146285	0000146285
0000146325	0000146325	0000146325	0000146325	0000146325	0000146325
0000152900	0000152900	0000152900	0000152900	0000152900	0000152900
0000180585	0000180585	0000180585	0000180585	0000180585	0000180585
0000181340	0000181340	0000181340	0000181340	0000181340	0000181340
0000189425	0000189425	0000189425	0000189425	0000189425	0000189425
0000189600	0000189600	0000189600	0000189600	0000189600	0000189600
0000195100	0000195100	0000195100	0000195100	0000195100	0000195100
			\$506,438.00	\$1,209,315.37	-\$702,877.37