

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 with the 'Settings' tab 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 current settings will be overridden. The message includes 'Yes' and 'No' buttons.

Panel Settings - TEST PANEL

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

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 with the 'Settings' tab selected. The 'Column Settings' section is expanded, showing a table with columns for Column Name, Caption, Width, Align, Footer, Format, Drill Down Column, and Drill Down Screen Name. The table contains 18 rows of data, including fields like intTransactionId, intPriceIndexId, intPriceProfileId, intSiteGroupId, strPriceProfileId, strPriceIndexId, strSiteGroup, dbiPriceProfileRate, dbiPriceIndexRate, dtmPriceIndexDate, intContractDetailId, intContractId, dbiQuantity, dtmBillingDate, and dtmTransactionDate.

Panel Settings - TEST PANEL

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
<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"/> dbiPriceProfileRate		75	Left				
<input type="checkbox"/> dbiPriceIndexRate		75	Left				
<input type="checkbox"/> dtmPriceIndexDate		75	Left				
<input type="checkbox"/> intContractDetailId		75	Left				
<input type="checkbox"/> intContractId		75	Left				
<input type="checkbox"/> dbiQuantity		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"/>

?

0.1s

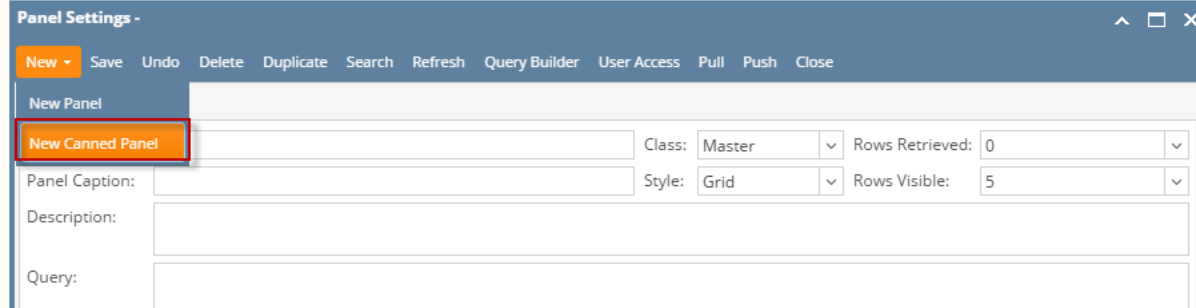
Ready

Refresh



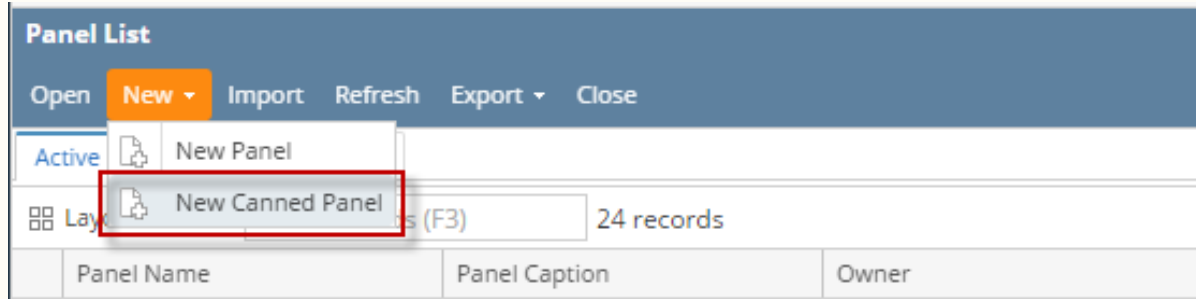
To build a **Canned Panel**:

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



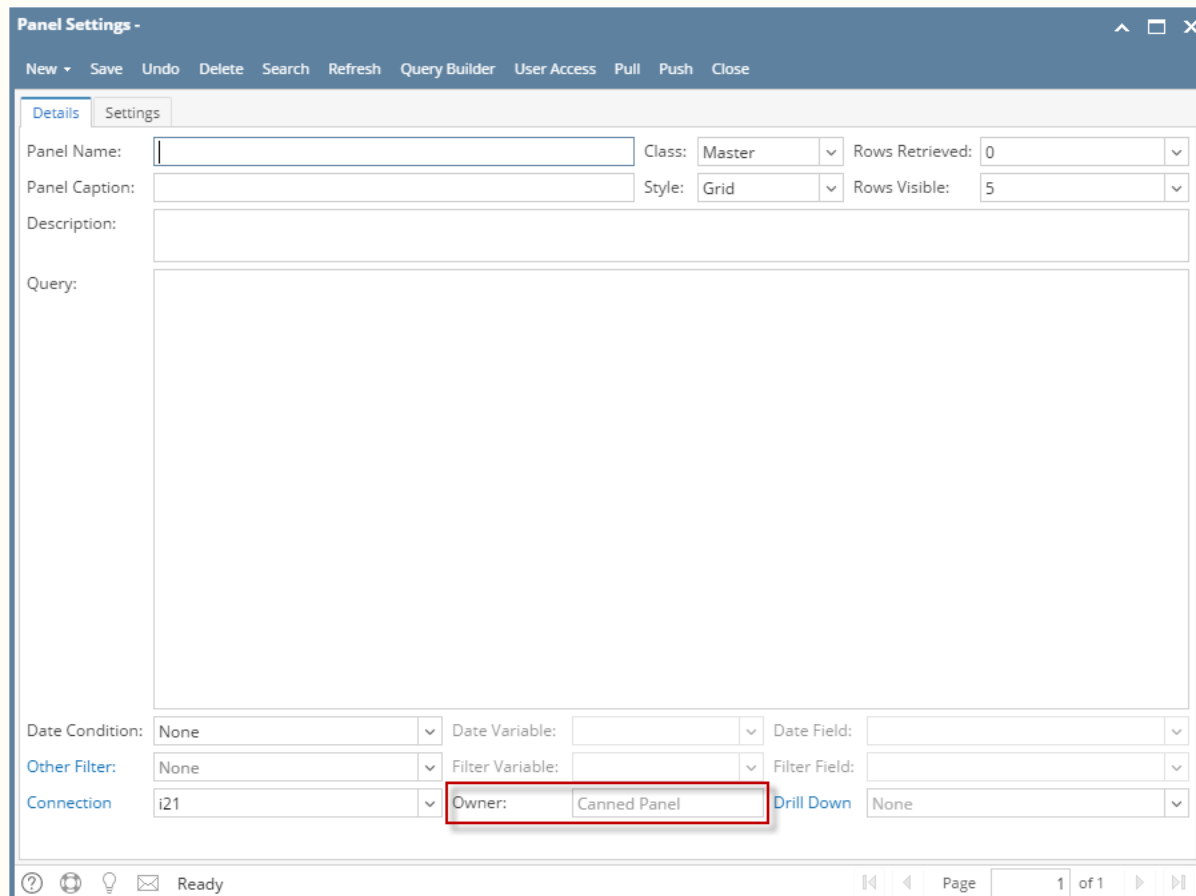
The **Panel Settings** dialog box is shown. The **New** button is highlighted in orange. Below it, the **New Canned Panel** button is highlighted with a red box. The dialog contains fields for **Panel Caption**, **Description**, and **Query**. On the right, there are dropdowns for **Class** (set to Master), **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 **Panel List** dialog box is shown. The **New** button is highlighted in orange. Below it, the **New Canned Panel** button is highlighted with a red box. The dialog shows a table with columns **Panel Name**, **Panel Caption**, and **Owner**. The **Owner** column is currently empty.

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



The **Panel Settings** dialog box is shown. The **Details** tab is selected. The **Panel Name** field is empty. The **Panel Caption** field is empty. The **Description** field is empty. The **Query** field is empty. The **Class** dropdown is set to **Master**. The **Style** dropdown is set to **Grid**. The **Rows Retrieved** dropdown is set to **0**. The **Rows Visible** dropdown is set to **5**. The **Date Condition** dropdown is set to **None**. The **Date Variable** dropdown is empty. The **Date Field** dropdown is empty. The **Other Filter** dropdown is set to **None**. The **Filter Variable** dropdown is empty. The **Filter Field** dropdown is empty. The **Connection** dropdown is set to **i21**. The **Owner** dropdown is set to **Canned Panel** and is highlighted with a red box. The **Drill Down** dropdown is set to **None**. The status bar at the bottom shows **Ready** and **Page 1 of 1**.

