## KnowledgeBase Article 2303

Introduction to the Dashboard and Reports Tool

The Guardian Dashboard and Reports tool is designed to give end-users the ability to create, modify and utilize a wide variety of reports and KPIs via an easy to use, web-based tool.

Guardian will install the IIS components and setup the Dashboard and Reports tool on your Guardian IIS server and inform you of the proper address to access the tool.

Security for the Dashboard and Reports tool is the same security for all Guardian users and must be setup in the Settings > Global Settings Management > User List> User Security under Guardian version 8 + Reports + Reports Management + Data Sets, Dashboard (each dashboard has its own security) and Guardian version 8 + Reports + Reports Management + Reports (each report has its own security).

1. Enter the address provided for the Dashboard and Reports tool internal website
   a. Chrome is the recommended browser, however, any browser should work
   b. Guardian will provide the address and port for you
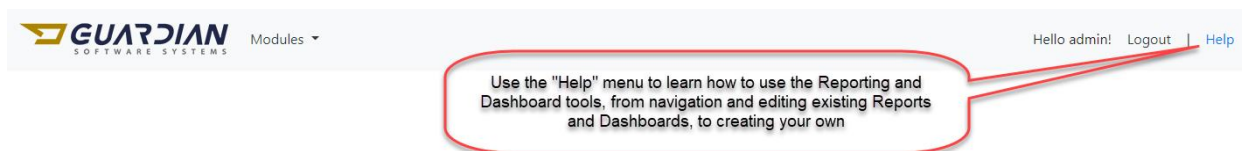   c. Enter your Guardian username and password to logon
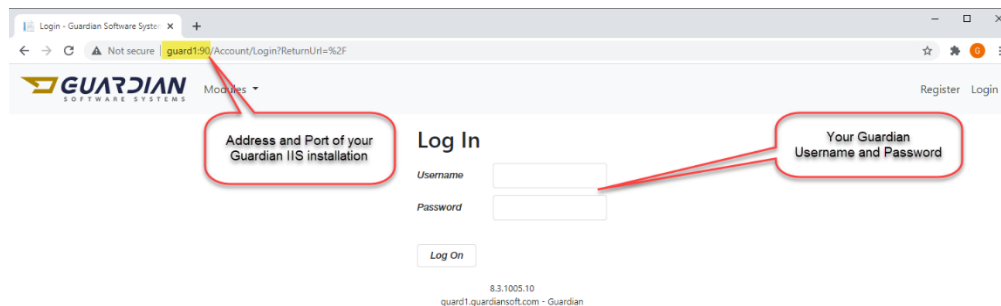
2. On the opening page, you may select Dashboard or Reports from the Modules dropdown list
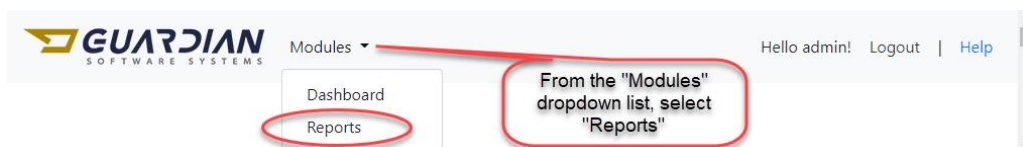
3. The "Help" menu will provide all the tutorial information required to navigate, design and use the Dashboard and Reports tool. It is strongly recommended that users review the Help information prior to using this tool.

4. In the Reports Module, locate the desired report by scrolling through the reports
   a. The only reports visible by default, are those you have security to see
   b. Click the "Show All Reports" checkbox to see all reports
      i. Reports you have security to use are Links in blue
      ii. Reports you do NOT have security to use are in black
   c. Click the column to sort the reports by that column
   d. Click the "Heart" to add that report to the Favorites list at the top
      i. You must refresh your browser for Favorites to be populated

5. Click the desired report to open it
6. Click "Copy" to create a copy of the report
   a. Allows modification of the report
   b. Opens report in the Editor screen

7. The report opens with navigational buttons at the top…

   a. Navigate to different pages ....
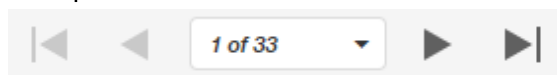
   b. Change the view of pages ....
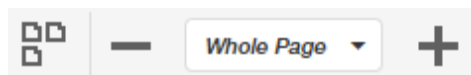
   c. Print the report ....

   d. Print the visible page ....

   e. Export the report (dropdown list) ....

   f. Search within the report ....

   g. Switch to Full screen viewing ....