

KnowledgeBase Article 2303

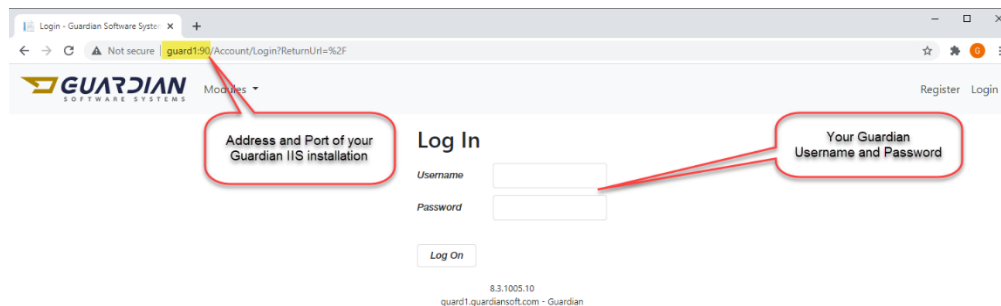
Introduction to the Dashboard and Reports Tool

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.

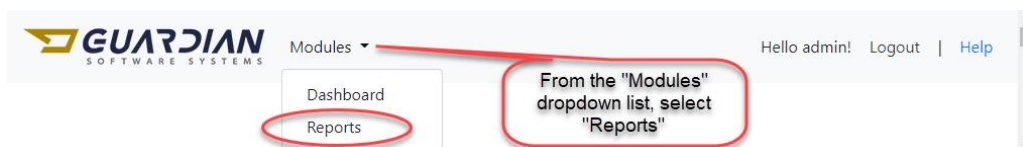
Guardian will install the IIS components and setup the Dashboard and Reports tool on your Guardian IIS server and inform you of the proper address to access the tool.

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

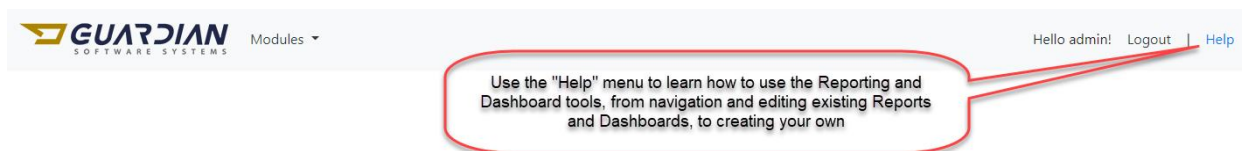


2. On the opening page, you may select Dashboard or Reports from the Modules dropdown list





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

Favorites

Favorite	Name	Category	Description	Actions
No data				

Reports

Show All Reports ☐

Drag a column header here to group by that column

Favorite	Name	Category	Description	Actions
	AP Aging	Accounts Payable	Supplier Invoice aging report	Copy
	AP Check Listing	Accounts Payable	A listing of supplier checks	Copy
	AR Invoice History	Accounts Receivable	Invoice History By Customer	Copy
	Customer Invoice Comparison	Accounts Receivable	Customer invoice comparison with variance	Copy
	Sales Backlog Projection	Sales Orders	4 Month sales outlook	Copy

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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

GUARDIAN SOFTWARE SYSTEMS Modules ▾ Hello admin! Logout | Help

Favorites

Click the desired report to open it

Click "Copy" to create a copy of the report and open it in the report editor

Favorite 1	Name 12	Category	Description	Actions
♥	AP Check Listing	Accounts Payable	A listing of supplier checks	Copy

Reports

Show All Reports ☐

Drag a column header here to group by that column

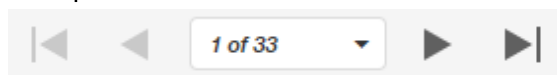
Q Search...

Favorite	Name ↑	Category	Description	Actions
♥	AP Aging	Accounts Payable	Supplier Invoice aging report	Copy
♥	AP Check Listing	Accounts Payable	A listing of supplier checks	Copy
♥	AR Invoice History	Accounts Receivable	Invoice History By Customer	Copy
♥	Customer Invoice Comparison	Accounts Receivable	Customer Invoice comparison with variance	Copy
♥	Sales Backlog Projection	Sales Orders	4 Month sales outlook	Copy

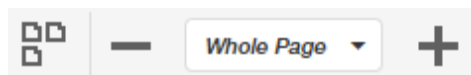
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7. The report opens with navigational buttons at the top...

- 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

