Dashboard Maintenance – Quick User Guide

Contents

About this document:

This document is a quick reference for setting up your dashboards. More detailed set up guidelines can be found in MYOB EXO Business 8.2 Release Notes and User Guide

New Version of Dashboard Introduces Security Change:

- The new version of Dashboards has additional security.
- This gives you the ability to allow user groups to view a dashboard report or not.
- However this change means the new version of dashboards need to be set up for first time new dashboard version use. This document provides guidance on doing this.

1. Open EXO Setup Menu manager
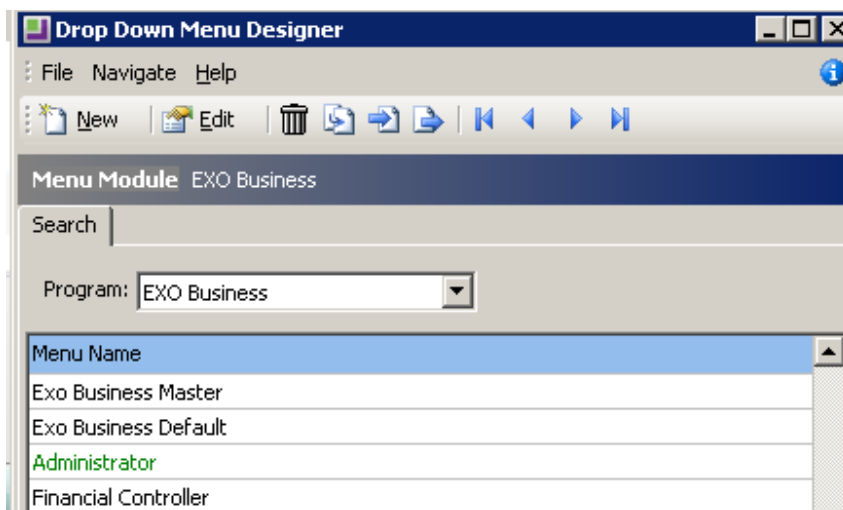
Begin by selecting the menu set up utility

- Open Exo
- Choose Setup>'Setup Menu' from dropdown options
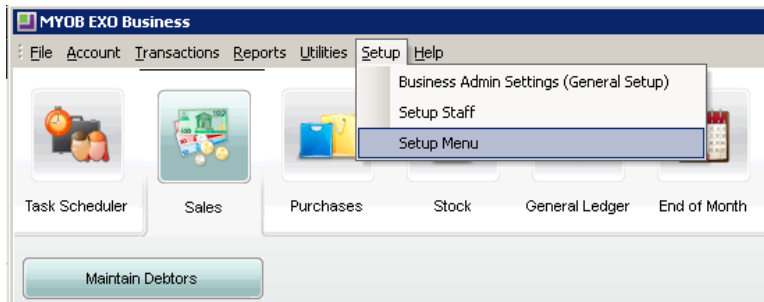
2. Choose User Group to Modify

Next choose a user group to add reports to its dashboards

- Choose Program to modify (e.g. EXO Business)
- Select menu group to modify (e.g. Administrator)
- Note: your menu is highlighted a 'green' colour

3. Add a Widget to Dashboard (e.g. Report)

Next choose the reports to add to the selected user group's Dashboard.

- Find 'Add a Widget' by entering 'Widget' into 'Filter' option, under Procedures
- Select (left mouse click), drag and drop the 'Add Widget' item from the right panel onto the left 'Reports' panel
- Select the widget to add from the widget list (e.g. Aged Payables)
- A name will automatically be given to the widget, but you can overwrite if you want
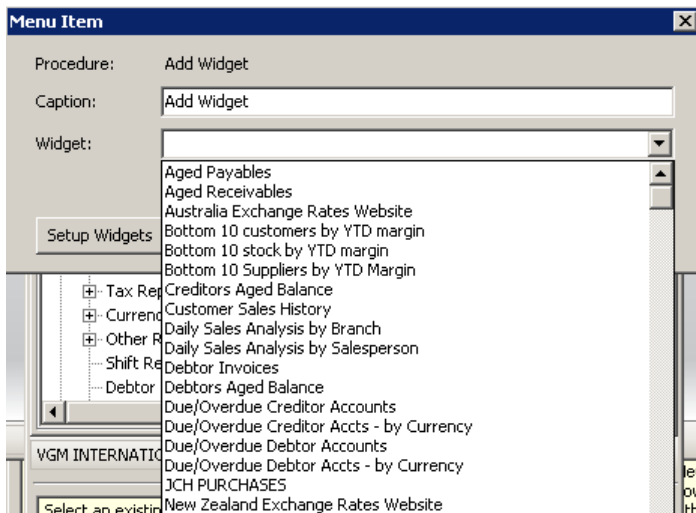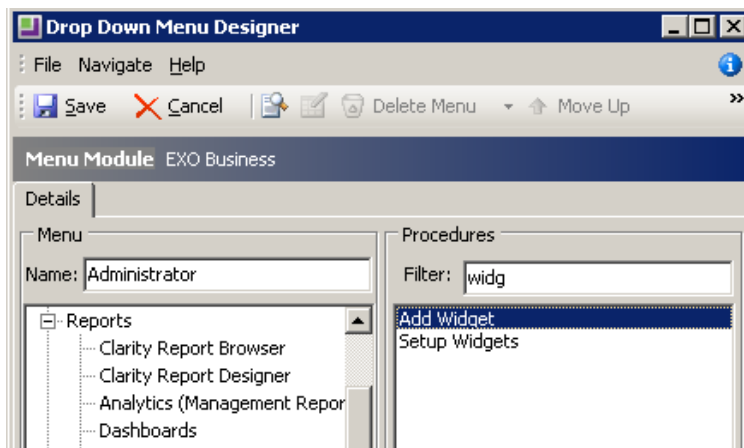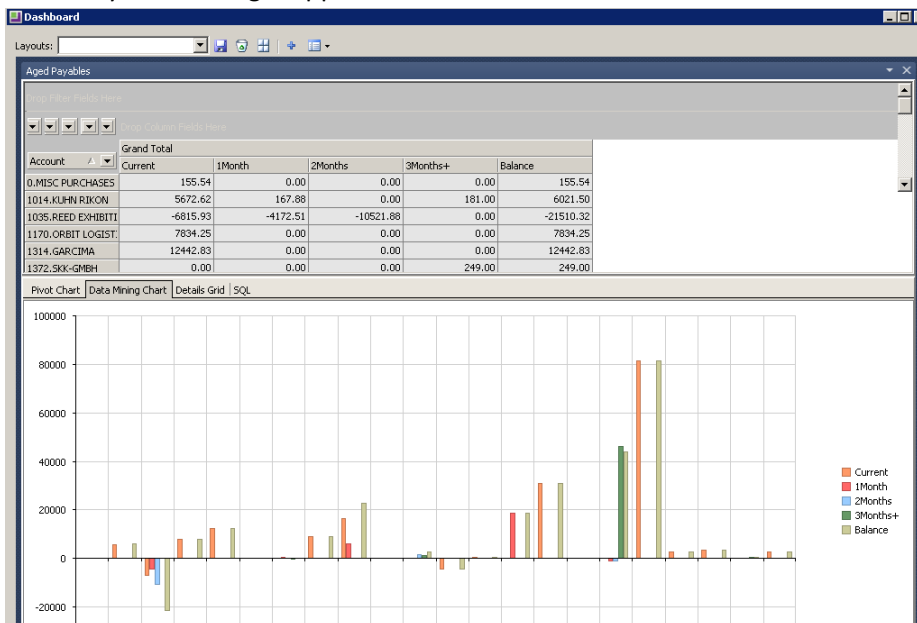
Example 1 – Aged Payables report added as widget to Dashboard

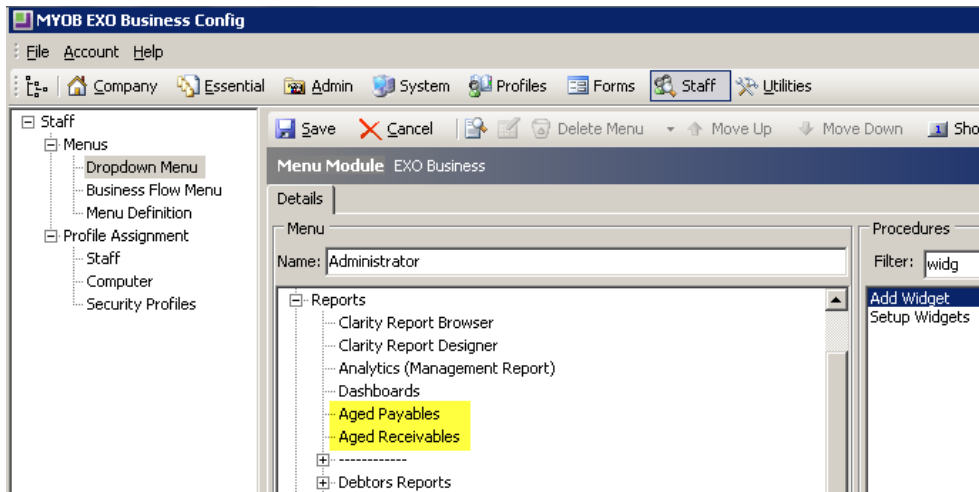Now 'Aged Payables' report is available in the Dashboard Widget List as a selectable option
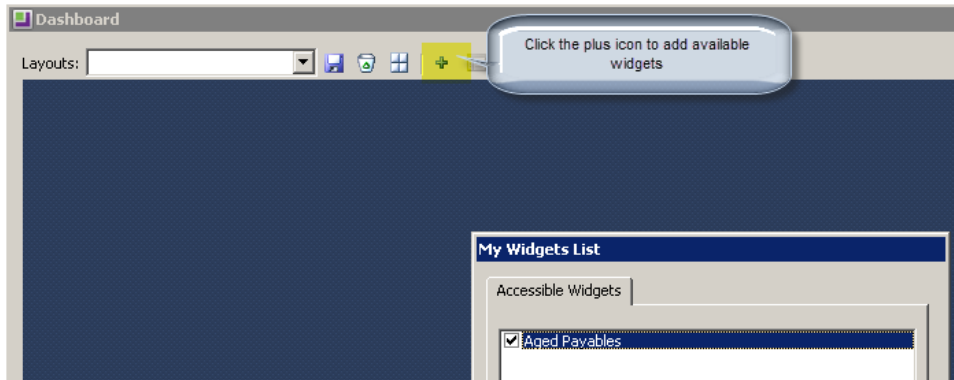
The newly added widget appears in the Dashboard as below

## Example 2 – Add Aged Payables and Aged Receivables report as widgets to Dashboard
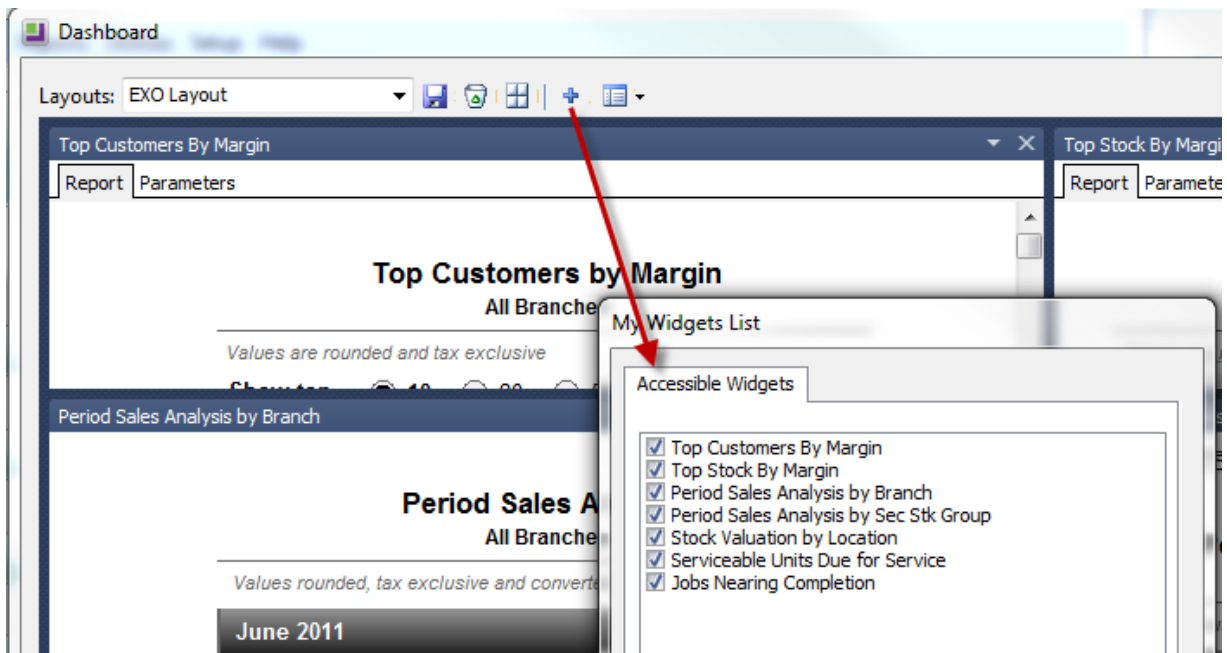
- Add Two report widget added to Administrator dropdown menu
- Two reports added as widgets now available in Dashboard reports

4. Select added Widgets to appear in your Dashboard

The widget(s) you have made available for the selected user group can now be added to 'your' dashboard view.

- Tic k the Accessible Widgets checkbox to add items to add to 'your' Dashboard view
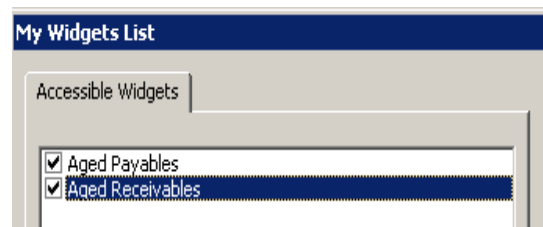
## 5. Organise Chosen Widgets on Your Dashboard View

You can change the placement of your reports within your Dashboard view.

- Left mouse click one of the docked report names and drag out of the docked location
- The widget 'placement' utility will appear
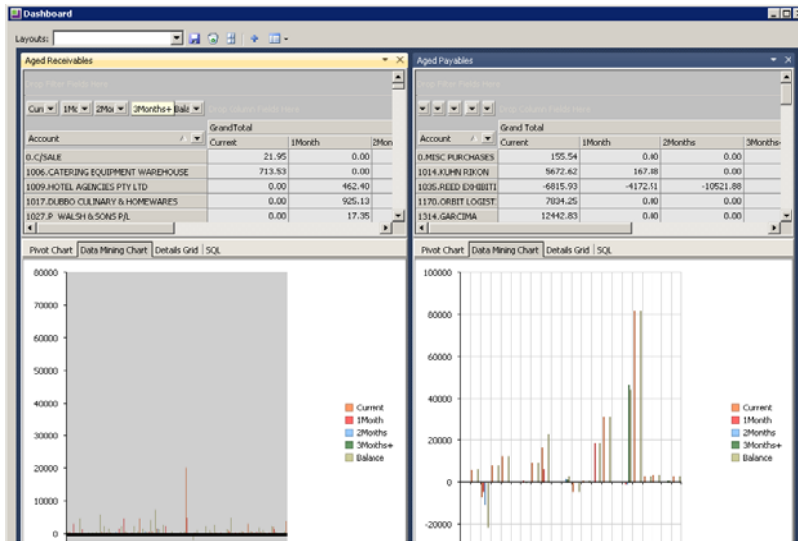- Use the widget placement utility to place/dock the reports within the dashboard template
-
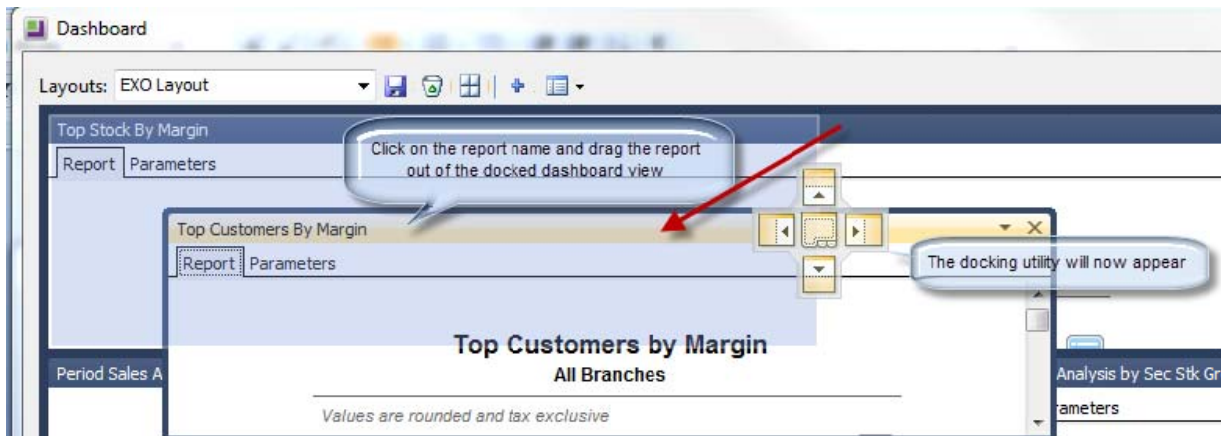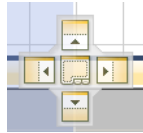
Example 3 - Docking a widget report
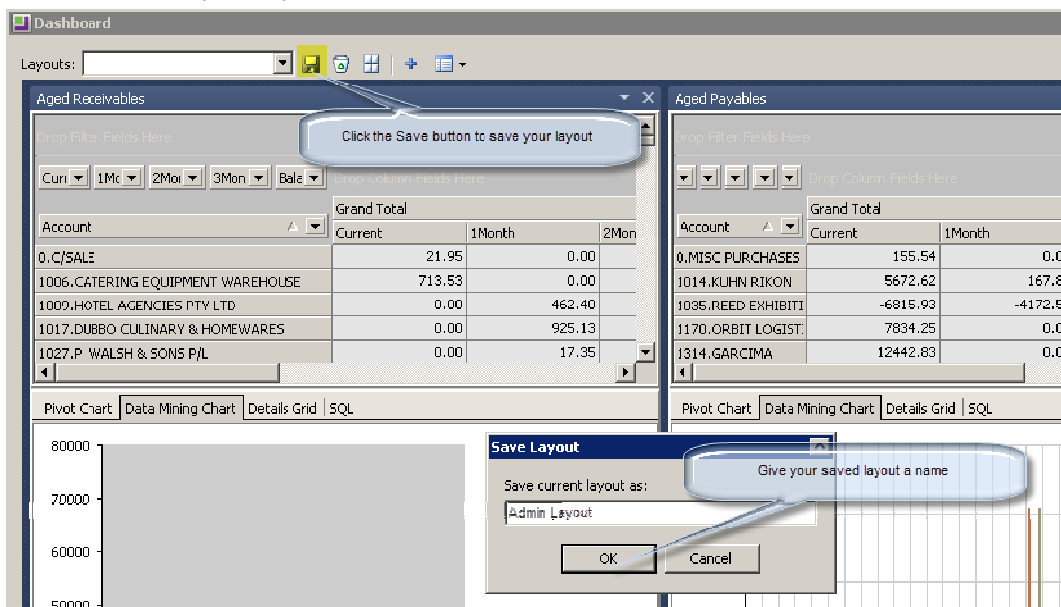
Click on a second report and
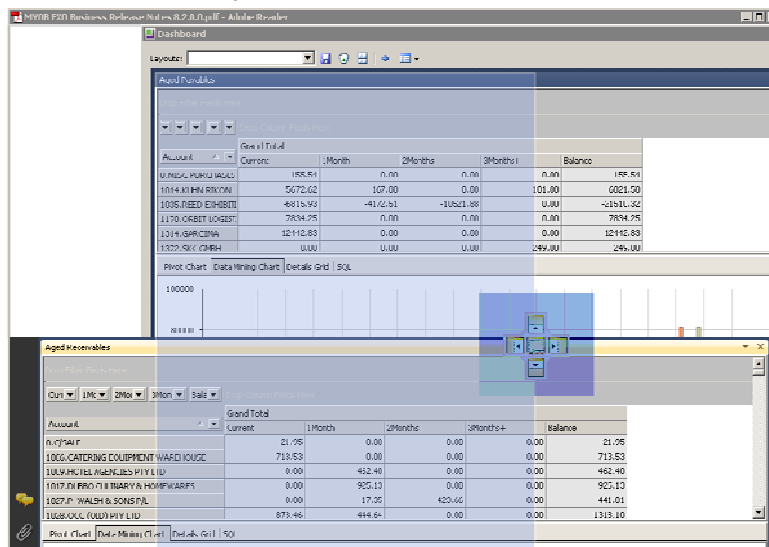
Two docked report widgets (side-by-side)

6. Save your new Dashboard layout

Once you have made reports available in your dashboard and added the reports to your dashboard you then need to save the layout.

- Click the Save button to save your layout
- Give your layout a name

7. Further Help Using Dashboards, Business Analytics and Widgets

Refer to MYOB EXO Business 8.2 Release Notes for more information on Dashboards, Widgets and Business Analytics