

# ECi Regional Users Meeting



**ECi** DDMS® **ECi** TeamDesign™ **ECi** OMD® **ECi** La Crosse™

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## *Executive Dashboard*



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## About Executive Dashboard

The new Executive Dashboard allows you to view and monitor totals for your business. These totals are based on fiscal year totals and include a complete breakdown of all accounts receivable, accounts payable, bank totals, and sales totals. You can easily monitor your company's cash flow.

When working in the dashboard, data is refreshed on-the-fly. While the Sales tab pulls from the previous Day-End's closed business, all other tabs (Accounts Receivable, Accounts Payable, and Bank) display data in real time. Every time you open Executive Dashboard, your data refreshes ensuring that you are always viewing the most current information available.

With user groups and user security, executives can access read-only views of data essential to their aspect of your business. Other groups, such as your sales department, can view read-only totals from a previous year allowing comparisons from year-to-year or even month-to-month. See Figures 1 and 2.

You can add new panels and screens, adjust screen layout, and customize the graph type (for example, view line graphs instead of area graphs, where applicable) and the columnar display of various grids.

Your A/R data can now be easily imported into SQL using the EBS Import Control Panel. For more information, see *Using the EBS SQL Import Panel* on our website at [www.ddms.com](http://www.ddms.com).

### Viewing A/P Information

In Executive Dashboard, you can view a cumulative total of all of your payables. You can view your daily accounts payable totals including fiscal year-to-date figures. You can also view business period and quarterly figures. You can use the information to audit your accounts payable.

### Viewing Cash Totals Information

You can easily monitor your company's cash flow. You can view totals for the year-to-date, a particular day, business period, or quarter. You can also print the information you are viewing.

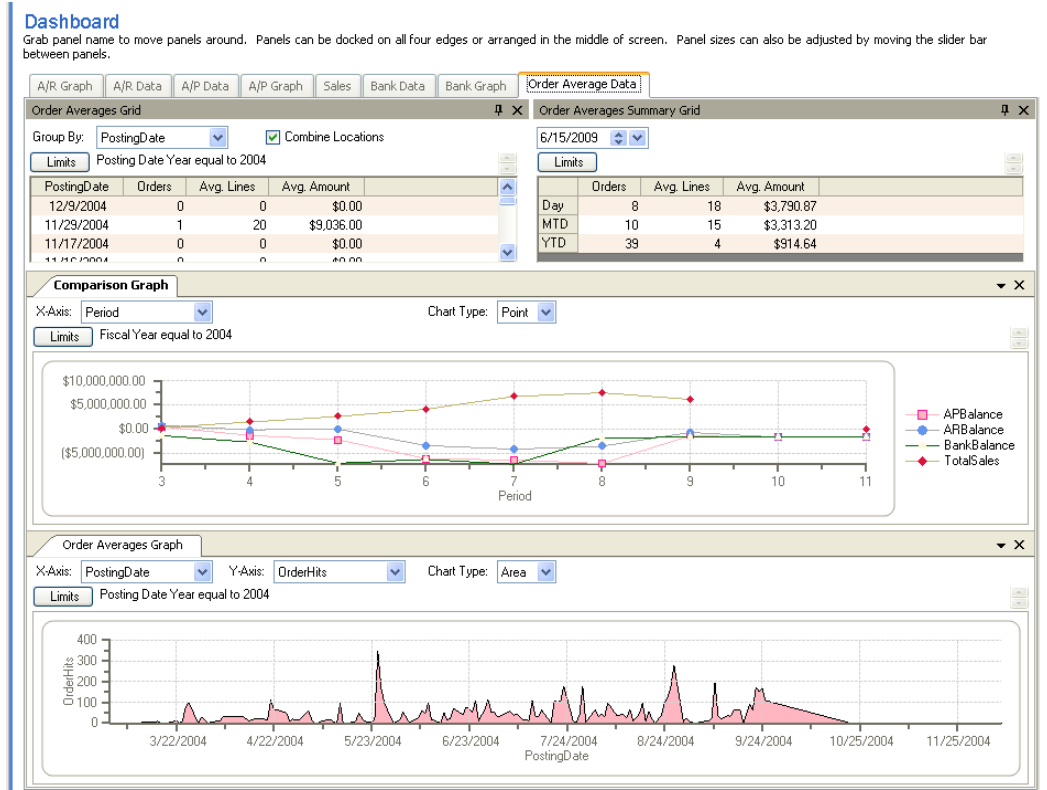
Most of the information in Executive Dashboard is automatically updated as daily procedures are performed.

### Viewing A/R Information

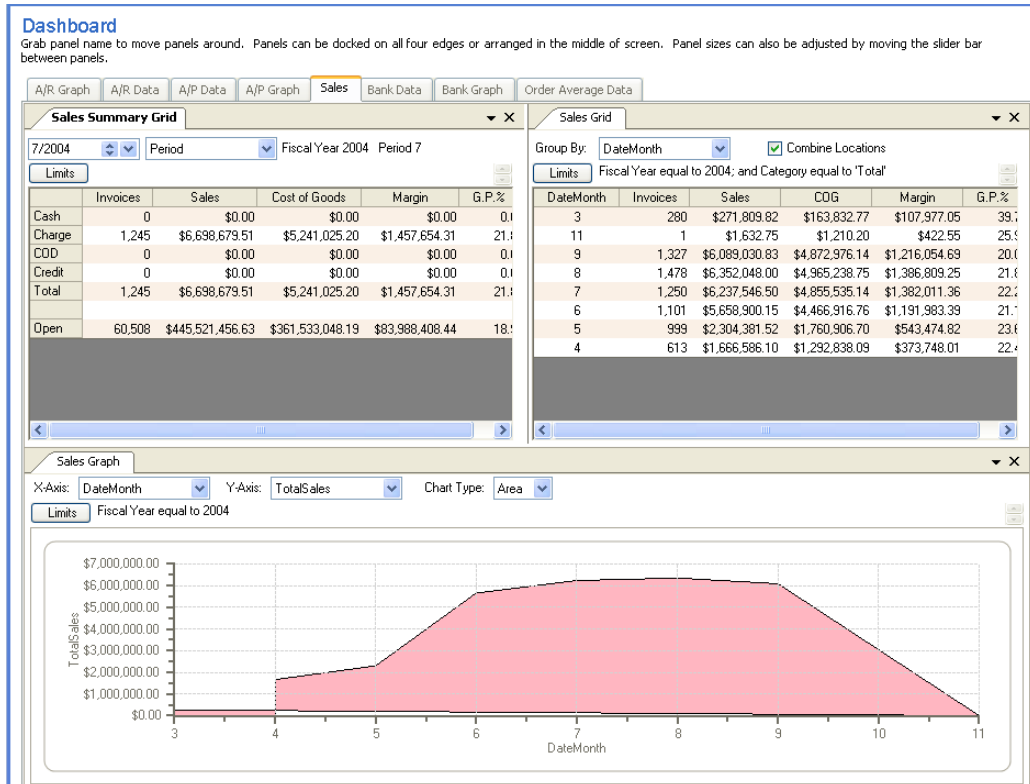
The Executive Dashboard A/R information displays totals of all of your receivables. You can see at-a-glance how much of your assets consist of receivables. It includes year-to-date and daily figures, and can also show you month-to-date and quarterly figures. You use the A/R information to perform your daily accounts receivable audit.

# Executive Dashboard

**Figure 1:  
Executive  
Dashboard  
Sales Data**



**Figure 2:  
Executive  
Dashboard  
Order Average  
Data**



## Viewing Sales Totals Information

In Executive Dashboard, you can easily view sales totals for the previous day. You can view totals for the business period or quarter. You can also print the information you are viewing.

Sales information in Executive Dashboard is automatically updated as daily procedures are performed.

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**Note:** Executive Dashboard is designed to give you greater flexibility in viewing business data. If your daily totals are incorrect, see your online help on editing daily totals in President's Screens.

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## Getting Started

1. First, you must set up a password in the Executive Dashboard parameters. See **Setting Up Parameters**.
2. In the Executive's Dashboard, you must set up security. See **Setting Up User Security** and **Setting Up User Groups**.

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**Note:** You must set up a password in the Executive Dashboard parameters before setting up security. You set up both individual and group security.

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3. Next, set up your dashboard. See **Setting Up the Dashboard**.

## Setting Up Parameters


Before using Executive Dashboard, you must set up a password. You also need to set up previous balances.

- 1 From the DDMS Master Menu, double-click  , then double-



- 2 From the Parameter Editor window, double-click Executive Dashboard, then click General Configuration.
- 3 You must enter a password in the Dashboard Set Up Password box, shown in Figure 3.

## Executive Dashboard

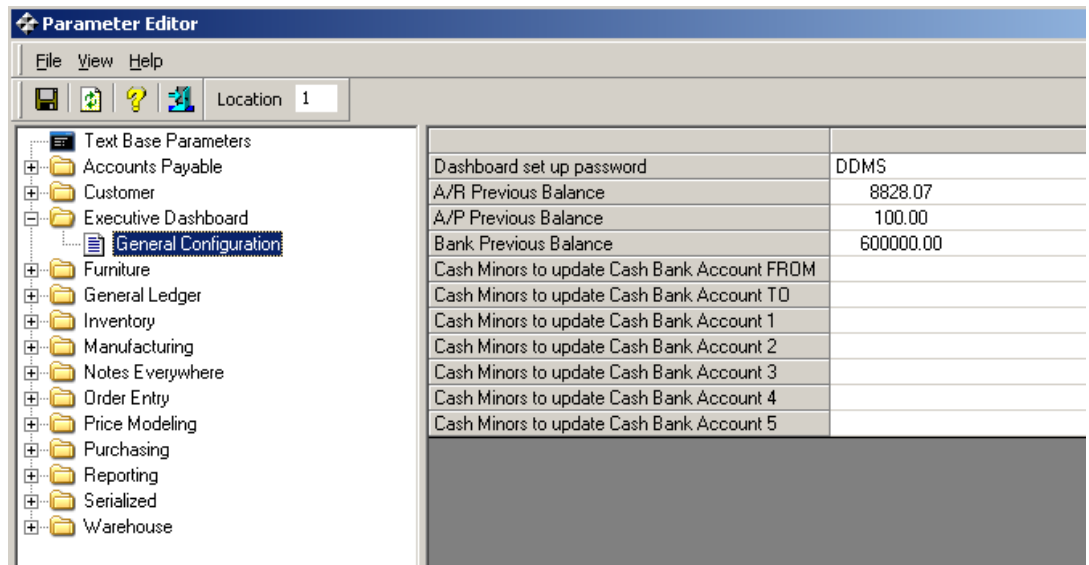
- 4 In the A/R Previous Balance box, enter the previous accounts receivable balance.
- 5 In the A/P Previous Balance box, enter the previous accounts payable balance.
- 6 In the Bank Previous Balance box, enter the previous bank balance.
- 7 In the Cash Minors to Update Cash Bank Account FROM box, enter the beginning minor number of the cash account to include in the range of cash account numbers.
- 8 In the Cash Minors to Update Cash Bank Account TO box, enter the ending minor number of the cash account to include in the range of cash account numbers.
- 9 In the Cash Minors to Update Cash Bank Account 1-5 box, you can enter up to five additional minor cash account numbers to include in the range.
- 10 When you enter the information, Executive Dashboard and General Configuration appear in bold. Click  to save your changes.

## Setting Up User Security

You must set up a password in the Executive Dashboard parameters before setting up security. Refer back to the heading **Setting Up Parameters**.

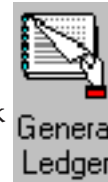
In the Dashboard, you can set up user security and user groups. However, we recommend that you set up security first.

**Figure 3:  
Executive  
Dashboard  
General  
Configuration  
Parameters**



You can set up individual or group security for Accounts Receivable, Accounts Payable, Bank, and Sales.

- 1 From the DDMS Master Menu, double-click

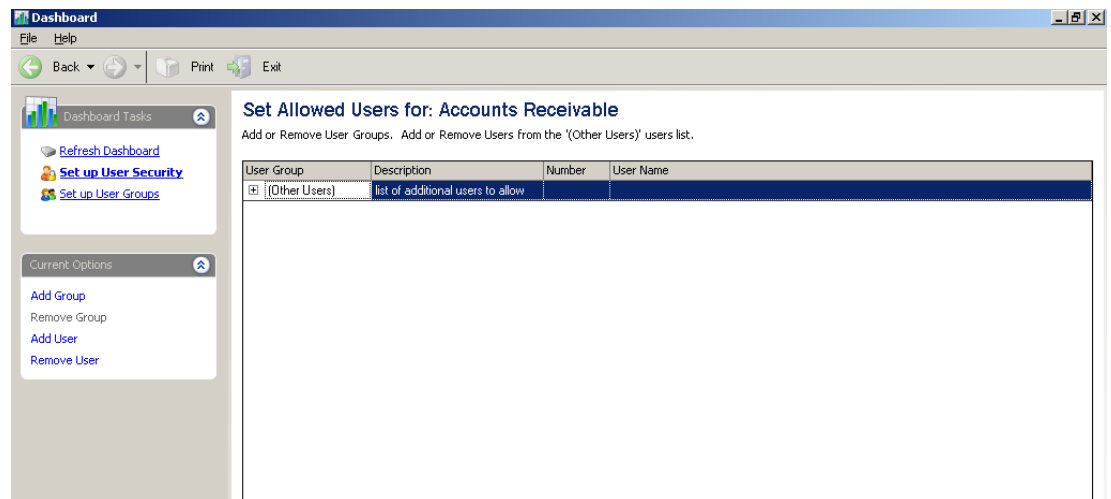


- then double-click



- 2 Click Set Up User Security.
- 3 The Dashboard Security Setup dialog box opens. Enter the password from the Executive Dashboard parameters then click OK.
- 4 You can set allowed users. To do so, highlight the area for which to set allowed users and click Set Allowed Users. (You can also highlight the area, Accounts Receivable for example, and right-click and select Set Allowed Users.) See Figure 4.
- 5 In the Set Allowed Users For window, highlight the user group and click Add User. (You can also highlight the user group and right-click and select Add User.)

**Figure 4: Setting Up User Security**



- 6 The Select Users dialog box opens listing all available users. Click the user to select and click OK.
- 7 The system returns to the Set Allowed Users For window. At this point, you can add or remove groups and add or remove users using the Current Options menu.

To remove a user, highlight that user and click Remove User. (You can also select a line and right-click Remove User.)

To add a group, click Add Group and select the group from the Select User Group Security dialog box. Highlight the group and click OK.

To remove a group, highlight the group to remove and click Remove Group. (You can also select a line and right-click Remove Group.)

To set allowed users/groups for another area, click Set Another Area.

## Setting Up User Groups

You can set up users and groups. However, we recommend that you set up user security first.

- 1 In the Executive Dashboard window, click Set Up User Groups.
- 2 The Dashboard Security Setup dialog box opens. Enter the password from the Executive Dashboard parameters then click OK.
- 3 Click Add Group.
- 4 The Set User Group dialog box opens. Enter the name of the group in the Name box and a group description in the Description box. Click OK.
- 5 The new group is now shown in the User Group List.

Once you've created the group, you can add users to the group. Highlight the group and click Add User. (You can also highlight the group and right-click and select Add User.) In the Select Users dialog box, click the user and then click OK.

If needed, you can remove users from the group. Highlight the user and click Remove User. (You can also highlight the user and right-click and select Remove User.)

To remove a group, highlight the group and click Remove Group. (You can also highlight the group and right-click and select Remove Group.) A warning message appears. Click OK to remove the group.

## Setting Up the Dashboard

To begin, click Refresh Dashboard. In the Dashboard window, you can add panels and tabs and save your customized layout.

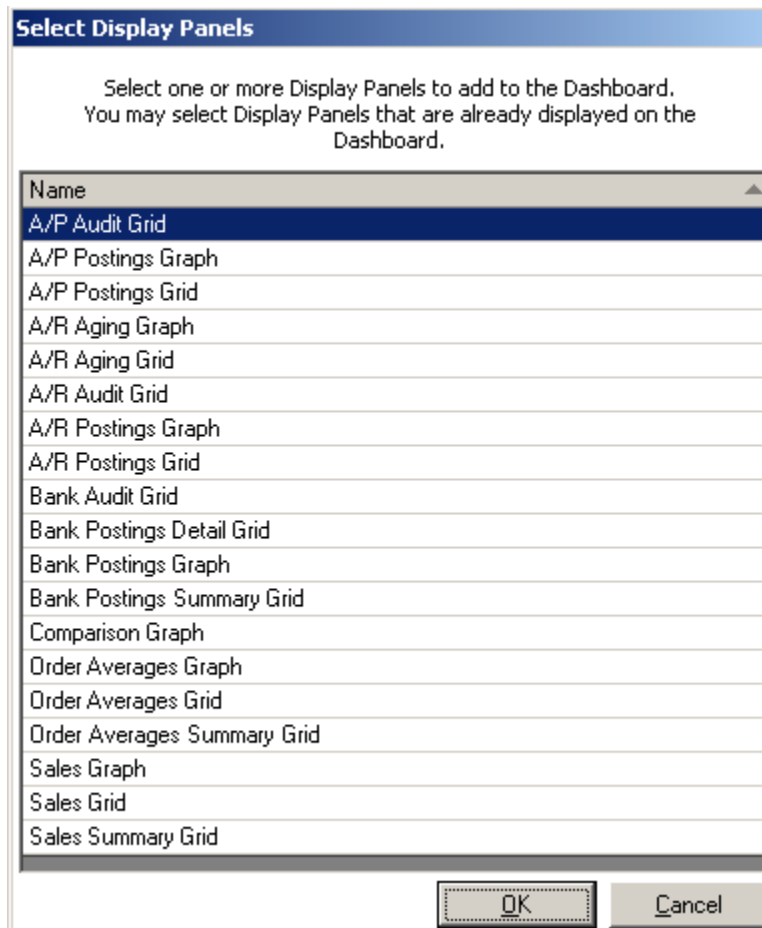
When setting up the dashboard for the first time, the Select Add Display Panels Option to Setup Your Dashboard message appears. Click OK.

## Using Panels

First, add a new panel. Panels can be moved around and renamed. You can dock the panels to the edges of the window or place them in the middle of the window. You can resize the panels by moving the slider bar. Panels can also be printed.

After adding panels to the dashboard, you can save your work. You can save your current data in each panel, save the panels that you added, and save tabs. You can select Save Current Panel Settings, Save All Panel Settings, or Save Overall Layout. When setting up for the first time, the system prompts you to save your work. Thereafter, you must manually save. The system *does not* prompt you to save.

- 1 In the Dashboard window, click Add New Panel.
- 2 The Select Display Panels dialog box opens, shown in Figure 5. You can select one or more display panels to add to the dashboard. You can select display panels more than once. Highlight the panel to display or select multiple panels by holding down the Ctrl key and clicking the panel names. Click OK.



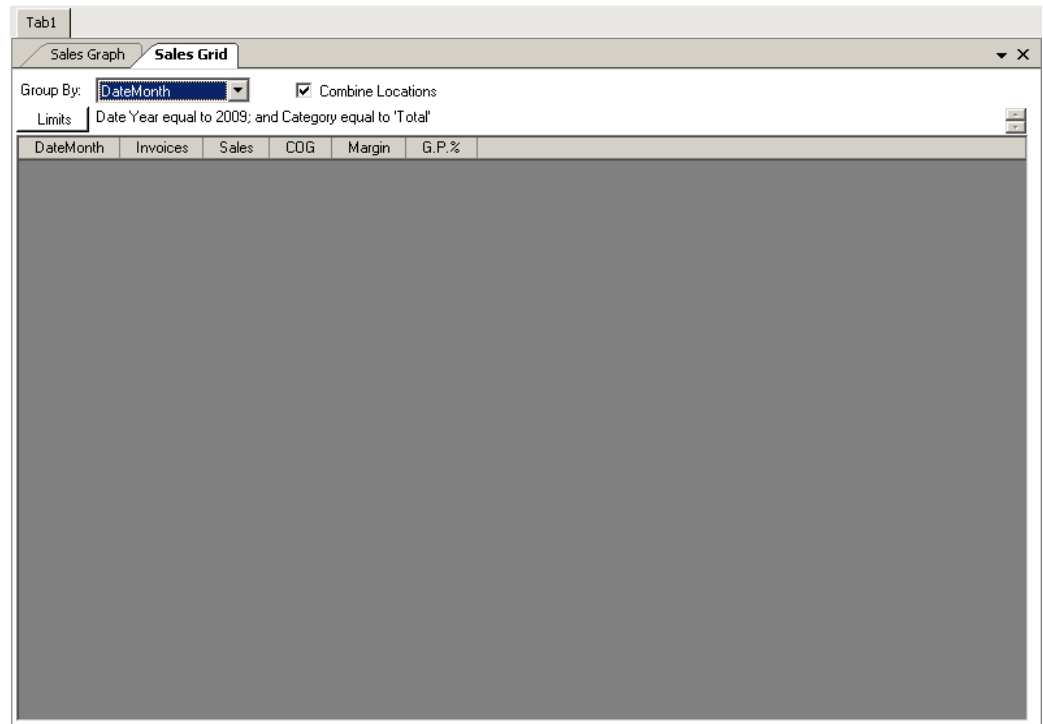
**Figure 5: The Select Display Panels Dialog Box**

## Executive Dashboard

- 3 The panels overlay, shown in Figure 6. You can click the panels and drag to a different position, shown in Figure 7.

### Dashboard

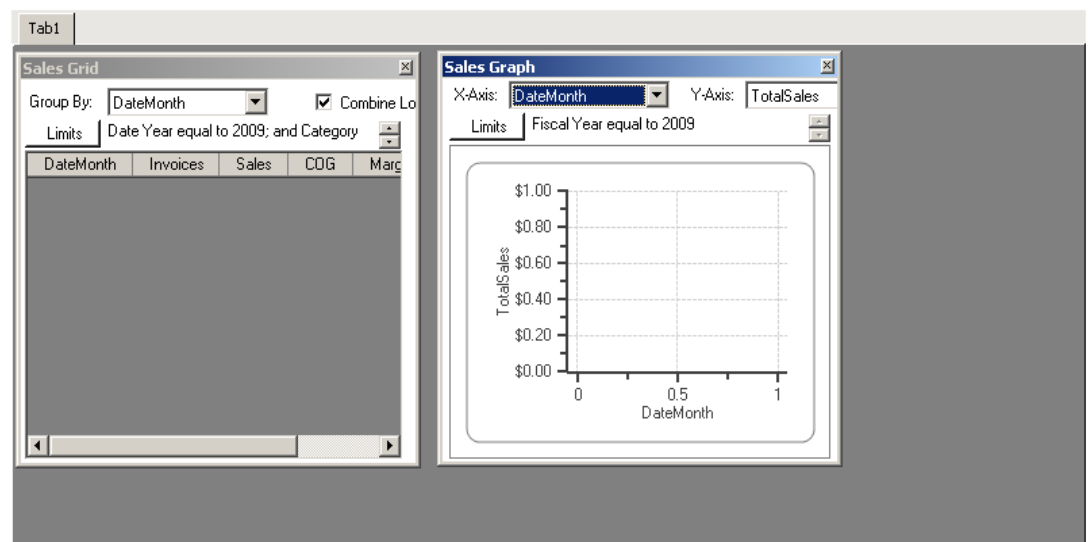
Grab panel name to move panels around. Panels can be docked on all four edges or arranged in the middle of screen. Panel sizes can also be adjusted by moving the slider bar between panels.



**Figure 6: The Panels Overlaid**

### Dashboard

Grab panel name to move panels around. Panels can be docked on all four edges or arranged in the middle of screen. Panel sizes can also be adjusted by moving the slider bar between panels.



**Figure 7: The Panels Separated (Floating)**

In each panel, you can easily manipulate data. For example, you can easily change dates by clicking the down arrow in a box and selecting a new date. See Figure 8. You can even select previous year, if applicable.

An example of floating panels is shown in Figure 7. Figure 9 is an example of docking a panel. To dock a panel, use your mouse to guide the panel to the docking squares then release.

You can rename a panel. To do this, click the panel to rename and click Rename Current Panel. The New Panel Name dialog box opens. Enter a unique name and click OK.

You can print a panel. To do so, click the panel to print and click Print Current Panel. See the heading **Printing Panels** for more information.

You can maximize a panel. To do this, click the panel and click Maximize Current Panel. When finished viewing the maximized panel, click the X in the upper right-hand corner to close and return to the Dashboard window.

If you decide you don't need the panel in the Dashboard window, click the X in the upper right-hand corner of the panel (when it is minimized) and the panel is removed from the Dashboard.

- 4 Before adding more panels or closing this window, you save your work by clicking either Save Current Panel Settings or Save All Panel Settings. You can also click Save Overall Layout. When setting up for the first time, the system prompts you to save your work. Thereafter, you must manually save. The system *does not* prompt you to save.

Once you've added all the panels for this tab, go to **Using Tabs**.

## Using Tabs

You can add tabs, rename tabs, or delete tabs. Giving a tab a unique name helps you more quickly identify which information to view.

- 1 Click Add New Tab.
- 2 The New Tab Name dialog box opens. Enter a unique tab name and click OK.

You can rename a tab. To do this, click the tab to rename and click Rename Current Tab. The New Tab Name dialog box opens. Enter a unique name and click OK.

You can delete a tab. To do this, click the tab to delete and click Delete Current Tab. The tab is immediately deleted.

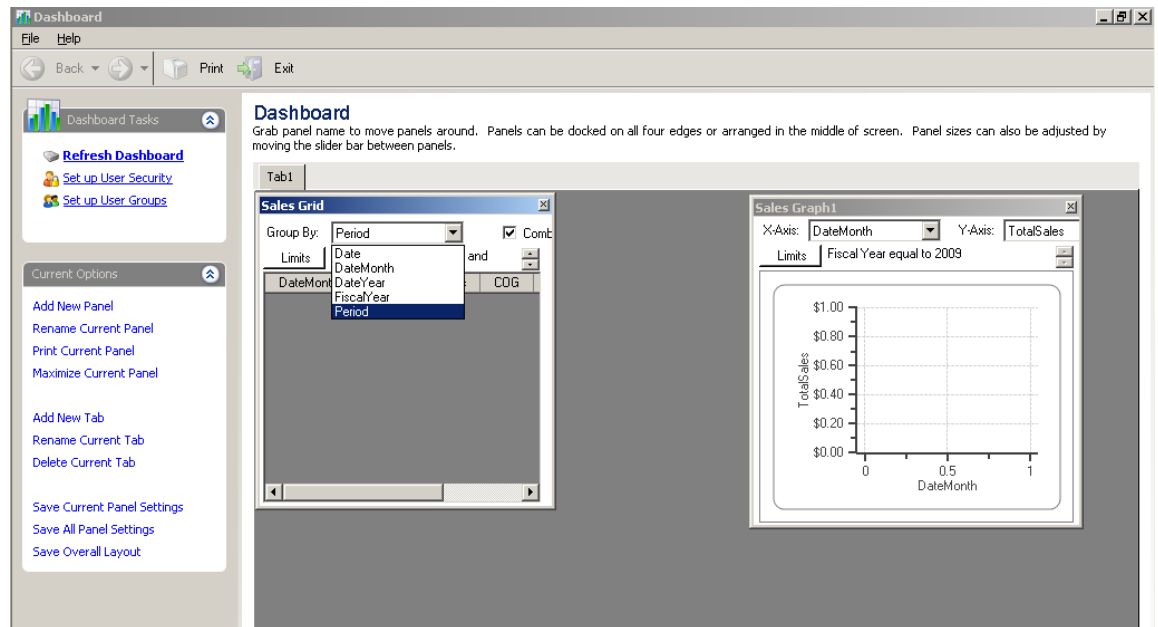
- 3 Before adding more tabs or closing this window, save your work by clicking either Save Current Panel Settings or Save All Panel Settings. You can also click Save Overall Layout. If you close without saving, all your work is lost.

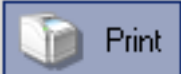



## Printing Panels

You can print panels or export to a file quickly and easily. You can perform any of the following functions:

- Change header information
- Set up your page just like you would in any other program, such as portrait or landscape
- Use the Find function to search for text
- Move through the pages using the arrow keys
- Print the panel or export to a file.

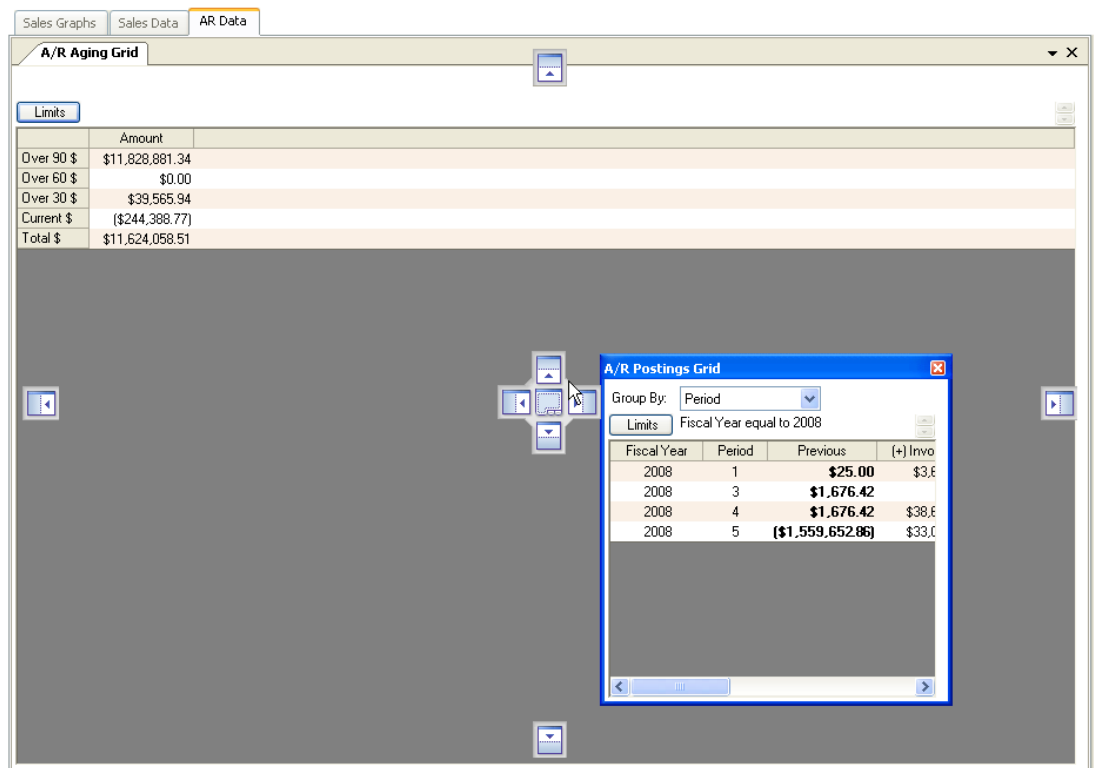
**Figure 8:**  
Selecting a Date  
to Group By



- 1 Click  .
- 2 In the Print Preview window, you can change headers and print or you can save to a file.
  - To change header information, click  . Then enter header information and click Apply when finished.
  - To print, click  .
  - To export to a file, click  . You can save the file as a pdf, htm, rtf, xls, or emf. You can also save to a C1PrintDocument to use with SQL Reporting.


**Dashboard**

Grab panel name to move panels around. Panels can be docked on all four edges or arranged in the middle of screen. Panel sizes can also be adjusted by moving the slider bar between panels.



**Figure 9:  
Docking a Panel**

## Executive Dashboard

- You can manually refresh data by clicking .
  - Once you save a report to one of these formats, you can manipulate data and print as you normally would.
- 3 When finished, click the X in the upper right corner to close the window.