

Tutorial:

# ONRAMP BASICS 2: USER OPTIONS, CUSTOM REPORTS AND DASHBOARDS

Using the user options screen to set up  
custom reports and dashboards.

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# User options screen

The **User Options and Preferences [S2065]** screen gives users the option to:

- Set up custom dashboards.
- Set up custom reports.
- Save their previous session.
- Confirm session exit.
- Manage their printers, etc.

User Options And Preferences [S2065] [S2065]

User Info And Preferences

\*\*User ID: dbardsley

Full Name: Darren Bardsley

Employee ID: [Dropdown]

Email: [Text]

Signature File: [Dropdown]

Start In: DASHBOARD [Dropdown] Dashboards

Disable Viewer: No

Maximize Viewer: Yes

Save Session: Yes

Confirm Exit: Yes

Filter Limit: 0

Shade Reports: No

Issue Updates: No

Enable Debugger: No

Collapse Top Menu: Yes

Collapse Side Menu: Yes

PO Limit: 0

Screen Previews: No

My Reports

My Dashboards

My Gadgets

User Devices

Device Name	Default	Active	WO	Zebra	Cheque	Zebra Green	DataMax	PM (Machine)	PM (Fixture)
[Device Name]									
[Device Name]									
[Device Name]									
[Device Name]									
[Device Name]									
[Device Name]	X		X	X	X	X	X	X	X
[Device Name]									
[Device Name]									

Cloud Printing History [Delete Inactive] [Refresh]

Device Detail

Label Type: <ALL> [Select All Records]

Label	Type	Description	Label Override
[Label]	[Type]	[Description]	[Label Override]

F1 for Help [Browse] [Edit] [Add] [Delete] [OK] [Cancel] [Print] [Exit]

# Changing the user preferences

1. To change the **User Info and Preferences**, click **Edit** in the bottom menu.
2. To change a field with a **Yes** or **No** option click on the field once.
3. Add or update your user information in the fields highlighted green.
4. Click **OK** when complete

**Note:** The fields indicated in green can be edited. The fields indicated in blue have already been updated.

The screenshot shows the 'User Options And Preferences' window for user [S2065]. The 'User Info And Preferences' section is highlighted with a red box and a red circle '3'. The fields in this section are: \*\*User ID: dbardsley, Full Name: Darren Bardsley, Employee ID: [dropdown], Email: [text], Signature File: [dropdown], and Start In: DASHBOARD [dropdown]. The preferences section is highlighted with a red box and a red circle '2'. The fields in this section are: Disable Viewer: No, Maximize Viewer: Yes, Save Session: Yes, Confirm Exit: Yes, Issue Updates: No, Enable Debugger: No, Collapse Top Menu: Yes, Collapse Side Menu: Yes, Filter Limit: 0, PO Limit: 0, Shade Reports: No, and Screen Previews: No. The 'User Devices' table is visible below. The 'Device Detail' section is highlighted with a red box and a red circle '4'. The 'Edit' button in the bottom menu is highlighted with a red circle '1'.

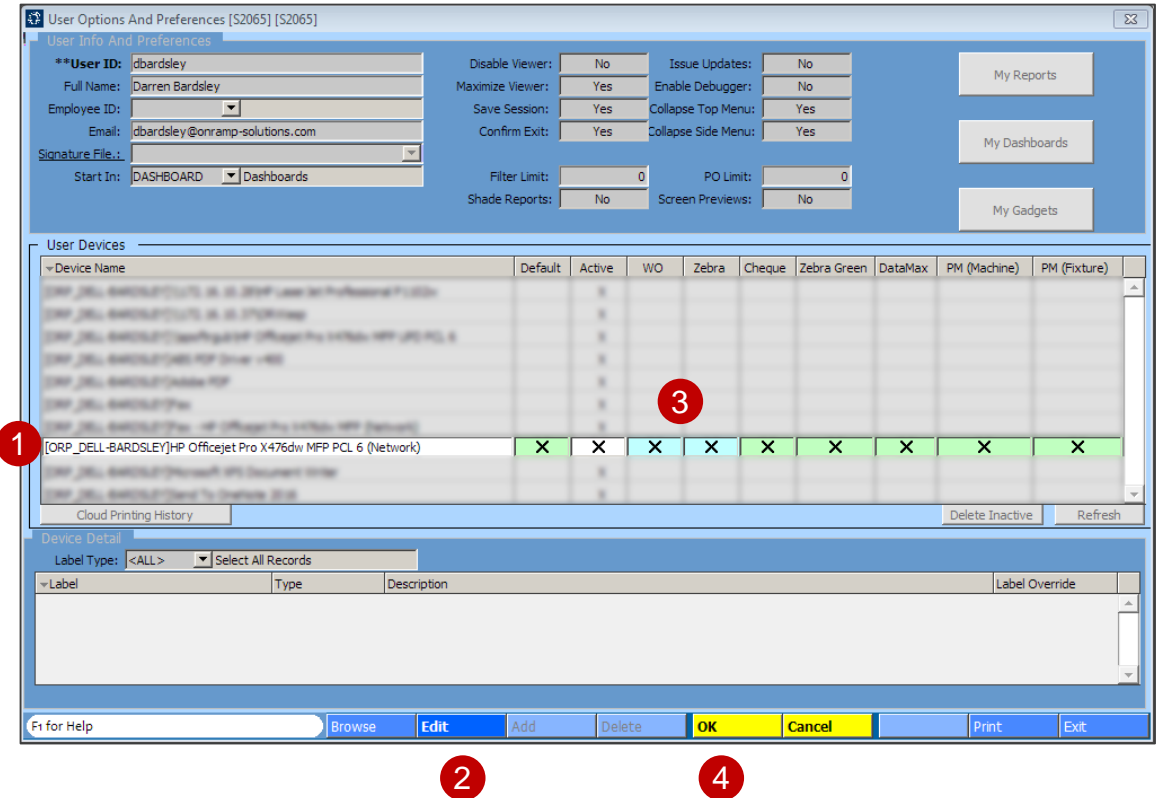
Device Name	Default	Active	WO	Zebra	Cheque	Zebra Green	DataMax	PM (Machine)	PM (Fixture)
[Device Name]									
[Device Name]									
[Device Name]									
[Device Name]									
[Device Name]									
[Device Name]	X		X	X	X	X	X	X	X
[Device Name]									
[Device Name]									

# Printer selection options

Users are able to manage which one of their connected network printers can be used with OnRamp.

Network printers can be used to print out work orders, reports, cheques (*depending on privileges*) and a variety of different labels.

1. To designate a printer for a specific OnRamp function, select it from the list.
2. To assign the printer, click the **Edit** button in the bottom menu.
3. Select the printer by clicking on the associated field. An “X” will appear when the printer has been selected.
4. Click **OK** to complete.



# SELECTING AND CREATING CUSTOMIZED REPORTS

# OnRamp report format

Before we learn how to compile a group of customized reports we will look at the report format OnRamp produces.

Reporting, allows users to compile and present their OnRamp data based on criteria filters which can be customized.

Depending on your requirements, criteria selection can provide either a broad view or a granular view of information.

Vendor ID	Vendor Name	Remit To Name	Credit Terms	Pay Type	A/P Account	Purchase Account	Last Cheque Date	Tax Report	Federal ID
1STPLACE	1ST PLACE FIRE PROTECTION	1ST PLACE FIRE PROTECTION	NET60	CHQ	3201	7510	05/30/2017	No	890220114
2RI	2RI ROBOTICS CORP	2RI ROBOTICS CORP	NET60	CHQ	3201	7502	02/06/2017	No	
407 ETR	407 ETR - EXPRESS TOLL ROUTE	407 ETR - EXPRESS TOLL ROUTE	NET0	CHQ	3201	7654	11/07/2016	No	
ABAMMANUC	ABA MANUFACTURING CO INC	ABA MANUFACTURING CO INC	NET30	CHQ	3202	7505	07/14/2014	No	
ABM	ASM HEAT TREATING LTD	ASM HEAT TREATING LTD	Net30	CHQ	3201	9999		No	
A.T.S	ACTIVE TRANSPORT SERVICES	ACTIVE TRANSPORT SERVICES	NET60	CHQ	3201	7044	03/09/2000	No	899614465RT
AAA HALT	AAA HALTON TAXI OF OAKVILLE	AAA HALTON TAXI OF OAKVILLE	NET0	CHQ	3201	7654	03/27/2017	No	
ABANTOE	ABANTO, EMMANUEL	ABANTO, EMMANUEL	NET0	CHQ	3201	7654	03/02/2017	No	
ABNACD	ABC NACO - NEPCO INC	ABC NACO - NEPCO INC	NET60	CHQ	3202	1601	11/15/2001	No	82N 42-1518416
ABELL	ABELL PEST CONTROL INC	ABELL PEST CONTROL INC	Net30	CHQ	3201	7510	03/20/2017	No	100012590
ABRAMEM	ABRAMS, MICHAEL	ABRAMS, MICHAEL	Net0	CHQ	3201	1601		No	
ABS MACH	ABS MACHINING INC.	ABS MACHINING INC.	NET60	CHQ	3201	7482	05/31/2010	No	
Access America	Access America Transport	Access America Transport	Net30	CHQ	3201	1601		No	
ACCUCAM	ACCUCAM MACHINING (USD)	ACCUCAM MACHINING	NET60	CHQ	3202	1601	04/03/2017	No	
ACCUCAM	ACCUCAM (CDN)	ACCUCAM MACHINING	NET60	CHQ	3201	1601	04/03/2017	No	
ACCUTECH	ACCUTECH MACHINE	ACCUTECH MACHINE	Net30	CHQ	3202	1601	07/11/2016	No	
AKOLANDS	AKOLANDS GRABBER	AKOLANDS GRABBER	Net30	CHQ	3201	7505	06/06/2016	No	
AKURATE	AKURATE TOOLS LTD.	AKURATE TOOLS LTD.	NET60	CHQ	3201	1601	06/15/2006	No	
ACH	AUTOMATED CUTTING MACHINERY	AUTOMATED CUTTING MACHINERY	NET30	CHQ	3201	7501	03/06/2017	No	
ACUREN	ACUREN GROUP INC	ACUREN GROUP INC	NET30	CHQ	3201	7419	01/26/2013	No	
Adiam	ADIAM LASER INC.	ADIAM LASER INC.	Net30	CHQ	3201	1601	05/11/2015	No	
ADILR	ADIL, RAFAY	ADIL, RAFAY	Net0	CHQ	3201	9999	05/23/2013	No	
ADV SERV	ADVANCED SERVO TECHNOLOGIES	ADVANCED SERVO TECHNOLOGIES	Net30	CHQ	3201	7502	11/30/2015	No	
ADV WASTE	ONTARIO WASTE	ONTARIO WASTE	Net15	CHQ	3201	7461	03/20/2017	No	
ADVANCE	ADVANCE BAR CODE SOLUTIONS	ADVANCE BAR CODE SOLUTIONS	NET60	CHQ	3201	7420	12/12/2016	No	139687632
ADVANTAG	ADVANTAGE SPECIALTIES	ADVANTAGE SPECIALTIES	NET30	CHQ	3201	7420	01/23/2017	No	
AEROTEK	AEROTEK LLC	AEROTEK LLC	NET15	CHQ	3201	3520	03/25/2013	No	
AFM	AFM INC. (CDN FUNDS)	AFM INC. (CDN FUNDS)	2%10, 30	CHQ	3201	7415	03/22/2010	No	886444454
AGF	AGF ACCESS	AGF ACCESS	Net30	CHQ	3201	9999	02/22/2016	No	
AGO	AGO INDUSTRIES INC	AGO INDUSTRIES INC	Net30	CHQ	3201	7421	02/06/2017	No	
ADM	AMERICAN IRON & METAL	AMERICAN IRON & METAL	Net30	CHQ	3201	7510		No	
AIRKOOL	AIR KOOL LIMITED	AIR KOOL LIMITED	Net30	CHQ	3201	7510	04/03/2017	No	R100093954
AIRLIQUIT	AIR LIQUIDE CANADA INC	AIR LIQUIDE CANADA INC	Net60	CHQ	3201	7402	03/29/2017	No	R1000767532
AIRMAX	AIRMAX COMPRESSOR SERVICES	AIRMAX COMPRESSOR SERVICES	NET60	CHQ	3201	7501	07/30/2007	No	
AIRSEP	AIR SEPRATATION TECHNOLOGIES INC	AIR SEPRATATION TECHNOLOGIES INC	Net30	CHQ	3201	9999	06/27/2016	No	
AIRSOLUT	AIR SOLUTIONS	AIR SOLUTIONS	NET60	CHQ	3201	7502	03/20/2017	No	
AIRTOOL	AIR TOOL SERVICES LTD	AIR TOOL SERVICES LTD	NET60	CHQ	3201	7413	05/16/2016	No	R100095843
AkinolaD	AKINOLA, DOTUN	AKINOLA, DOTUN	Net0	CHQ	3201	9999	12/03/2015	No	
ALGOMA	ALGOMA	ALGOMA	NET45	CHQ	3201	1601	04/20/2009	No	
AllConnect	All Connect Carrier for GE	All Connect Carrier for GE	Net30	CHQ	3201	1601		No	
ALLEGIS	Allegis Corporation	Allegis Corporation	Net30	CHQ	3201	1601	09/19/2016	No	

# Running custom reports

OnRamps **Automated Reports Customization [S2071]** screen allows users to select what reports they wish run and when they want them.

Reports can be compiled into individual groups, and those groups can be customized at any point should you wish to add or remove a report.

There is also the option to print out a single report or a complete group of reports.

To open the **Automated Reports Customization [S2071]** screen, click on the “*My Report*” button on the **User Options and preferences [S2065]** screen.

Automated Reports Customization [S2071]

Report Groups

Run Selected List Print Selected List

Name	Description	Frequency	Freq. Factor	Sched. Time1	Sched. Time2
Production	Shop floor productivity	M	5	hr :mi ap	hr :mi ap
Sales	Sales Reports	W	4	01:00 PM	

Last Schedule:

Next Schedule:

Report Group Detail

Report ID	Report Name	My Description	Sort	Print?	Email?
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Report Criteria

Reset to Default

Criteria ID	Description	Default	Use Default?	Custom Value
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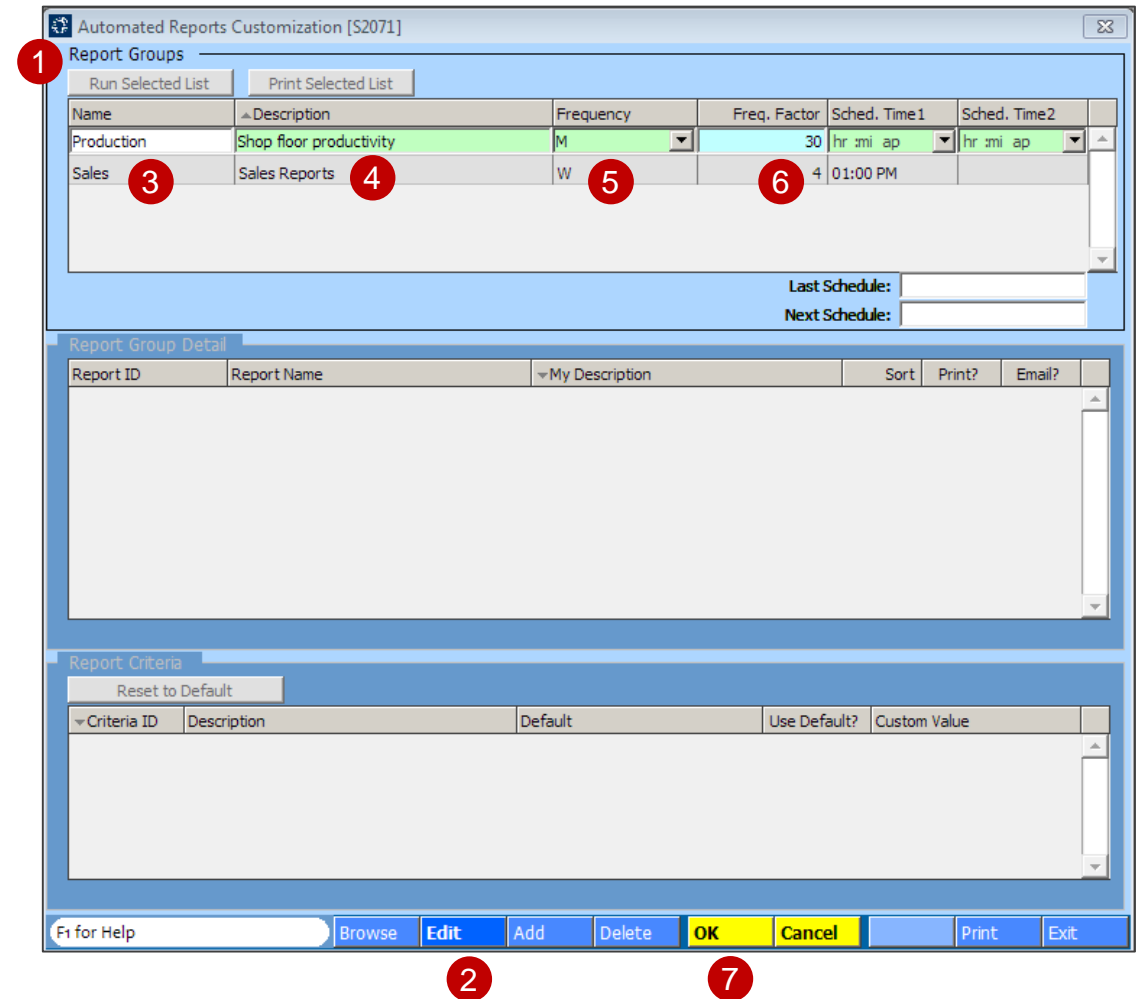
F1 for Help Browse Edit Add Delete OK Cancel Print Exit



# Creating a report group

For this example, we are going to generate a monthly sales report that will be delivered by email on the 30<sup>th</sup> of each month.

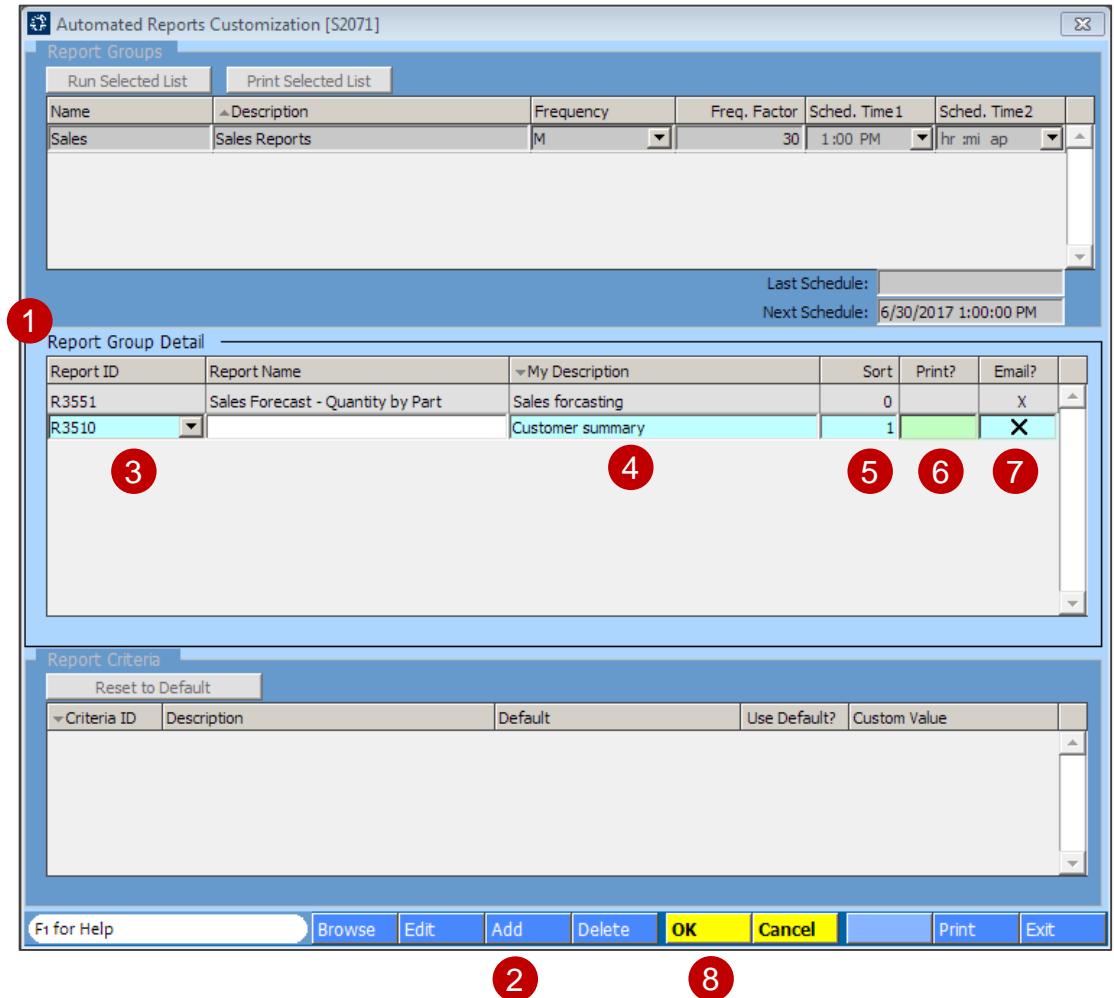
1. To create a new report group select the **Report Groups** frame.
2. Click the **Add** button in the bottom menu.
3. Give your report group a **Name**.
4. Enter a **Description** for your report group.
5. Select the **Monthly Frequency** option to receive the report on.
6. Enter 30 as a value for the **Frequency Factor**. This will be the day during the month the report will be generated on.
7. Click **OK** when complete.



# Adding a report to a group

1. Click on the **Report Group Detail** frame.
2. Click **Add** in the bottom menu.
3. Select a report to add from the **Report ID** menu.
4. Enter a **Description** for the report.
5. For multiple reports, users have the option to change the output order by entering a sort number.
6. To print the report at the designated time, click on the **Print** field to select the “X”.
7. Click on the **Email** and select the “X” field to set the report to send to your email address at the designated time.
8. Click **OK** to complete.

**Note:** To add multiple reports for the same group, repeat the above process.



# Updating the report criteria

Some reports allow users to change the default criteria values to a custom value.

1. Click on the **Report Criteria** frame.
2. Select the criteria you want to change.
3. Click on the **Edit** button.
4. To switch off the default value click on the **Use Default** field to change the value from “Yes” to “No”.
5. Select the new **Custom Value** from the drop down menu.
6. Click **OK** to finalize.

The screenshot shows the 'Automated Reports Customization [S2071]' window. The 'Report Groups' section is visible at the top, and the 'Report Group Detail' section is below it. The 'Report Criteria' section is at the bottom, containing a table with columns: Criteria ID, Description, Default, Use Default?, and Custom Value. The 'Edit' button is highlighted in blue, and the 'OK' button is highlighted in yellow. Red circles with numbers 1 through 6 are overlaid on the interface to indicate the steps: 1 points to the 'Report Criteria' frame, 2 points to the 'Criteria ID' column, 3 points to the 'Edit' button, 4 points to the 'Use Default?' column, 5 points to the 'Custom Value' column, and 6 points to the 'OK' button.

Criteria ID	Description	Default	Use Default?	Custom Value
C1	Date From:	<TODAY>	No	<SITE>
C2	Date To:	<TODAY>		
C3	Invoice Type:	S	Yes	
C4	Customer Group:	<ALL>	Yes	

# CREATING CUSTOMIZED DASHBOARDS

# Dashboard customization

Being able to monitor and review key plant data analytics quickly has now become a standard tool to help improve and streamline business processes. An easy way get to access that data is by setting up a customized dashboard to display using OnRamp.

With 185 different dashboards available, OnRamp enables users to create custom dashboard set ups that can provide a fast, real-time data previews.

To create a custom dashboard click on the **My Dashboards** button on the **User Options and Preferences** screen [S2065].

The screenshot shows the 'Dashboard Customization [S2067]' window. It features several sections for configuring dashboards:

- My Dashboard Groups:** A table with columns for Sort, Name, Description, and Cycle Time. Below it are 'Template' dropdown, 'Upload Template', and 'Delete Template' buttons.
- Group Items:** A table with columns for Line, Sort, ID, Description, Gadget?, and Refresh Time. Below it is a 'Move To Group:' dropdown.
- Dashboard Criteria:** A table with columns for Description, Default Value, Use Default?, and Custom Value. Below it is a 'Set To Default' button.
- Available Dashboards:** A table with columns for Category, Sub Category, ID, Description, and Add. Below it are 'Category' and 'Template' dropdowns, and a 'Download Template' button.
- Earned and Target HRS:** A line chart titled 'Earned and Target HRS' for 'Default Group '1002' at current week'. The Y-axis is 'Earned Hours' (0 to 1500) and the X-axis is 'Day of Week'. The chart shows 'Earned' (green line) and 'Target' (red line) cumulative hours over the week.

The bottom of the window has a toolbar with buttons: Browse, Edit, Add, Delete, OK, Cancel, Print, and Exit.

# Creating a dashboard group

1. To create a new dashboard, click on the **My dashboard groups** tab.
2. Click the **Add** button at the bottom of the screen.
3. Enter a **Sort** number, this will determine the order you want the dashboards to display.
4. Create a **Name** for the dashboard group.
5. Enter a **Description**.
6. Click **OK** when complete.

Dashboard Customization [S2067]

My Dashboard Groups

Sort	Name	Description	Cycle Time
1	1nthly Sales	Monthly sales data	0

Template:  Upload Template Delete Template

Group Items

Line	Sort	ID	Description	Gadget?	Refresh Time
------	------	----	-------------	---------	--------------

Move To Group:

Dashboard Criteria

Description	Default Value	Use Default?	Custom Value
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Set To Default

Available Dashboards

Category: <ALL> Template: <ALL> Download Template

Category	Sub Category	ID	Description	Add
		BLANK	Blank Dashboard (Spacer)	
LATES		D1000	Past Due Purchase Orders	
		D1001	Parts in Location over 24 Hours	
		D1002	Current Week Sales	
		D1003	Specific Week to Date Sales	
		D1004	Earned HRS WTD	
		D1005	Week Earned and Target HRS	Add
		D1006	Total Pending Scrap	

Earned and Target HRS  
Default Group '1002' at current week

Day of Week

Legend: Earned (green), Target (red), Earned Cum (green), Target Cum (red)

Buttons: Browse, Edit, Add, Delete, OK, Cancel, Print, Exit

# Adding the dashboards

1. Click back to the **Available Dashboards** frame.
2. The dashboard list can be filtered using the **Category** drop down menu, the **Search** field or you can choose from one of the predefined **Templates**.
3. Select the dashboard from the list.
4. Click the **Add** button to add it to the group.

The screenshot shows the 'Dashboard Customization [S2067]' window. The 'Available Dashboards' frame is highlighted with a red box and numbered 1. It contains a 'Category' dropdown menu (numbered 2) and a 'Download Template' button. Below this is a table of available dashboards with columns for Category, Sub Category, ID, Description, and Add. The 'Add' button for the 'Current Week Sales' dashboard is numbered 4. The 'Current Week Sales' dashboard is shown as a chart with the title 'Current Week Sales' and the y-axis 'Sales \$ (in Thousands)'. The x-axis is 'Days of the Week' (Mon, Tue, Wed, Thu, Fri). The chart shows 'Sales' (green bars), 'Forecast' (red bars), 'Cum Sales' (green line), and 'Cum Forecast' (red line). The 'Add' button for the 'Current Week Sales' dashboard is numbered 3.

Category	Sub Category	ID	Description	Add
		BLANK	Blank Dashboard (Spacer)	
LATES		D1000	Past Due Purchase Orders	
		D1001	Parts in Location over 24 Hours	
		D1002	Current Week Sales	Add
		D1003	Specific Week to Date Sales	
		D1004	Earned HRS WTD	
		D1005	Week Earned and Target HRS	
		D1006	Total Pending Scrap	

# Managing the dashboards

1. When you click the **Add** button, the dashboard will be added to the Group Items frame. Here you will see the list of all the dashboards in your selected group.
2. To remove a dashboard from the group, select the dashboard to be deleted.
3. Click on the **Delete** button.

The screenshot shows the 'Dashboard Customization [S2067]' window. It is divided into several sections:

- My Dashboard Groups:** A table with columns for Sort, Name, Description, and Cycle Time. It contains one item: '1 Monthly Sales Monthly sales data 0'.
- Available Dashboards:** A table with columns for Category, Sub Category, ID, Description, and Add. It lists various dashboards like 'D1022 No. of POs has PO price differs from Std price', 'D1023 Process Performance', etc. A red circle '1' is placed over the 'Add' button for the 'Process Performance' dashboard.
- Group Items:** A table with columns for Line, Sort, ID, Description, Gadget?, and Refresh Time. It lists the dashboards currently in the group. The row for '6 0.0 D1025 Number of Customers that Exceed Credit Limit' is highlighted in red, with a red circle '2' next to it.
- Dashboard Criteria:** A table with columns for Description, Default Value, Use Default?, and Custom Value. It lists criteria like 'Main Title', 'Sub Title', 'GYR Threshold 1', and 'GYR Threshold 2'.
- Process Performance Average Running Time by Day:** A line chart showing 'Avg. Runtime (Secs)' on the y-axis (0 to 4,000) and dates from May 31 to June 12 on the x-axis. The chart shows a fluctuating red line representing the average runtime over the last 14 days.
- Toolbar:** Located at the bottom, it contains buttons for 'Browse', 'Edit', 'Add', 'Delete', 'OK', 'Cancel', 'Print', and 'Exit'. A red circle '3' is placed over the 'Delete' button.



# Modifying dashboard criteria

Users also have the option to modify some of the dashboard criteria.

Dashboard criteria can be the main titles, sub titles and the scale of the values that represent data.

For this example, we will change the value for the Main Title.

1. Select the “*Main Title*” element on the in the **Dashboard Criteria** frame.
2. Click the **Edit** button.
3. Enter the new title in the **Custom Value** field.
4. Click **OK** when complete.

Dashboard Customization [S2067]

My Dashboard Groups

Sort	Name	Description	Cycle Time
1	Inthly Sales	Monthly sales data	0

Available Dashboards

Category: <ALL> Template: <ALL> Download Template

Category	Sub Category	ID	Description	Add
		D1022	No. of POs has PO price differs from Std price	
		D1023	Process Performance	Add
		D1024	Vendors On Hold	
		D1025	Number of Customers that Exceeding Credit Limit	
		D1026	Number of Vendors that Exceed Credit Limit	
LATES		D1027	WO Lates By Date	
		D1028	Active Parts (Demand but no BOM)	
		D1029	Active Parts (Demand but no routing)	

Group Items

Line	Sort	ID	Description	Gadget?	Refresh Time
1	0.0	D1002	Current Week Sales		0
2	0.0	D1003	Specific Week to Date Sales		0
3	0.0	D1000	Past Due Purchase Orders		0
4	0.0	D1027	WO Lates By Date		0
5	0.0	D1025	Number of Customers that Exceed		0
7	0.0	D1023	Process Performance		0

Dashboard Criteria

Description	Default Value	Use Default?	Custom Value
Main Title	Current Week Sales	No	Weekly sales
Sub Title		Yes	
GYR Threshold 1	0	Yes	
GYR Threshold 2	0	Yes	

Process Performance Average Running Time by Day

Avg. Runtime (Secs)

Last 14 Days

Buttons: Browse, Edit, Add, Delete, OK, Cancel, Print, Exit

# Reviewing the dashboard group

1. Go back to the main menu and click the **Dashboard** button in the main menu.

Once the system has refreshed the page the dashboard will appear.

2. Dashboards can be refreshed at any time by clicking on the **Refresh** button on the top right corner of the screen.

