Tutorial:

ONRAMP BASICS 2: USER OPTIONS, CUSTOM REPORTS AND DASHBOARDS

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

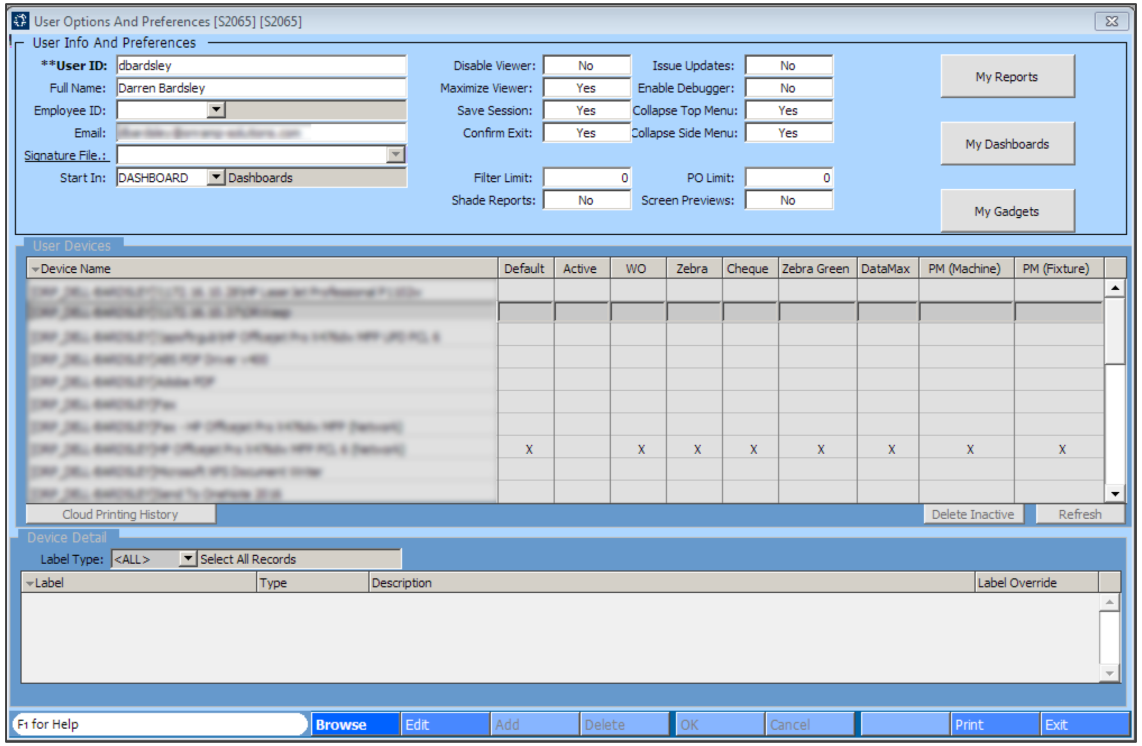
ONRAMP SOLUTIONS

Contents

User options screen

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

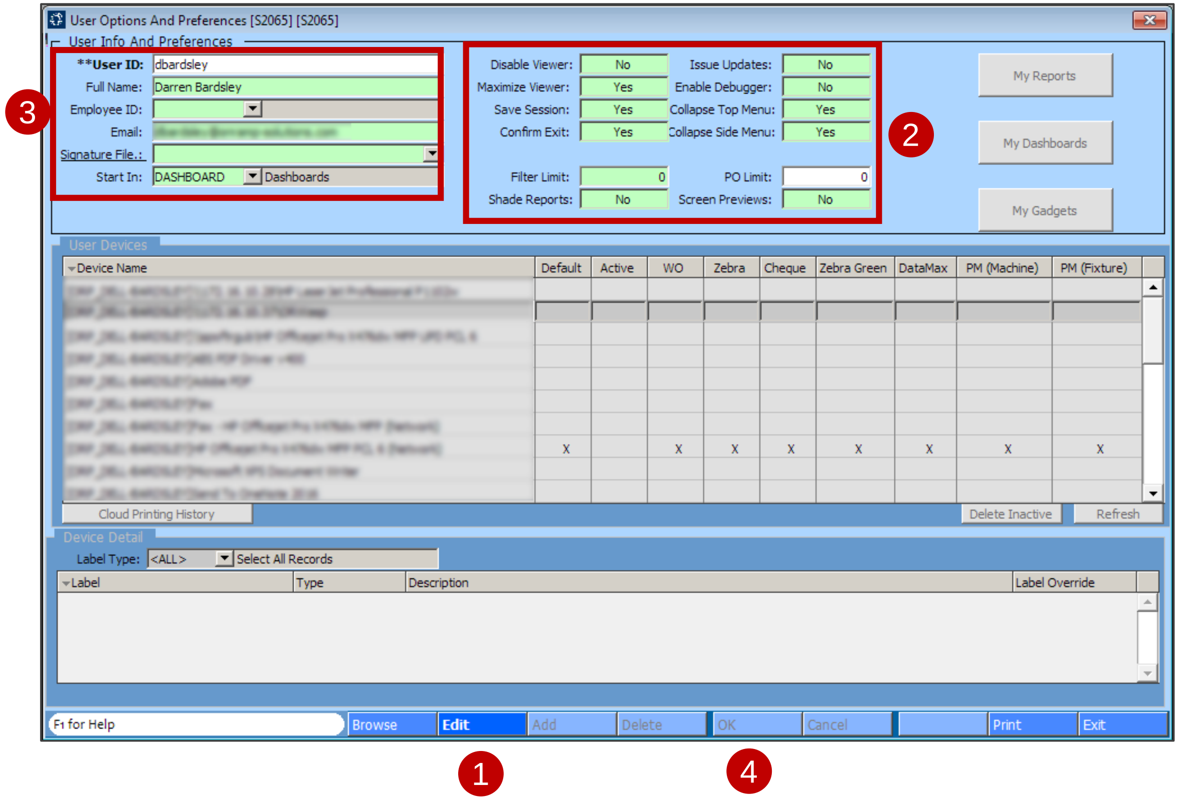
- Set up custom dashboards.
- Set up custom reports.
- Save their previous session.
- Confirm session exit.
- Manage their printers, etc.



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.*

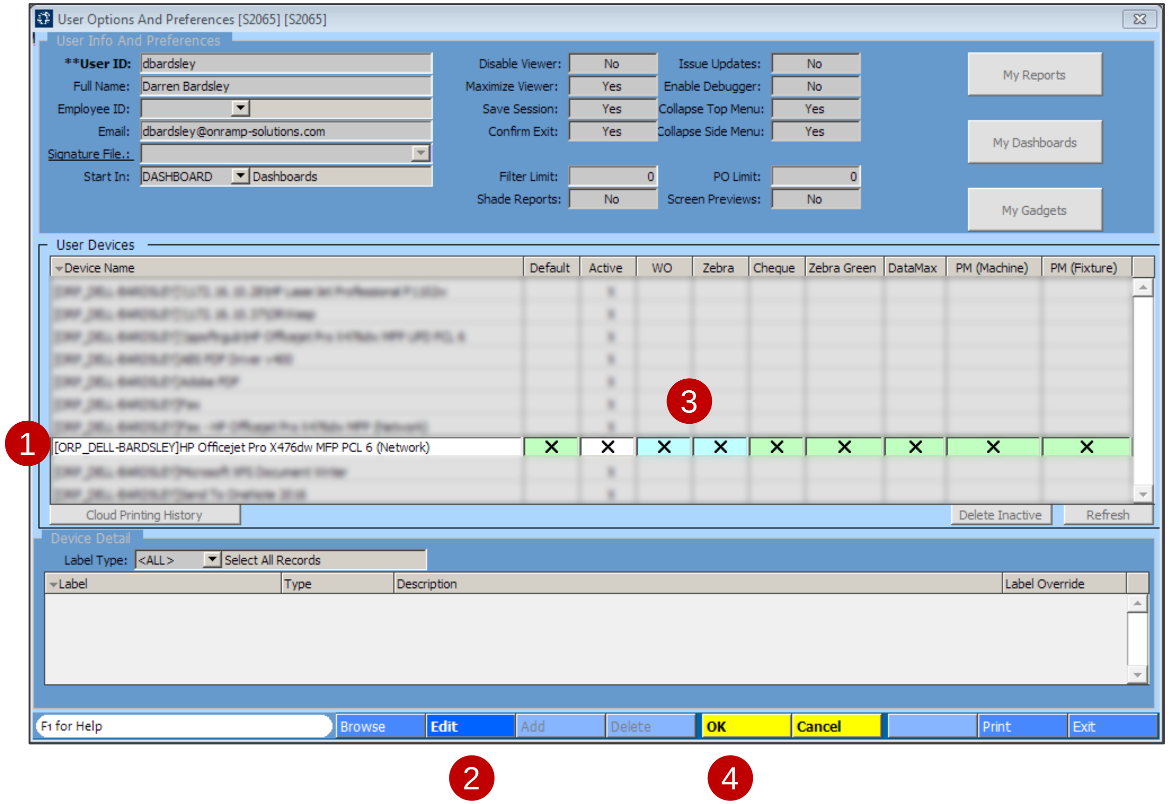


Printer selection options

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.



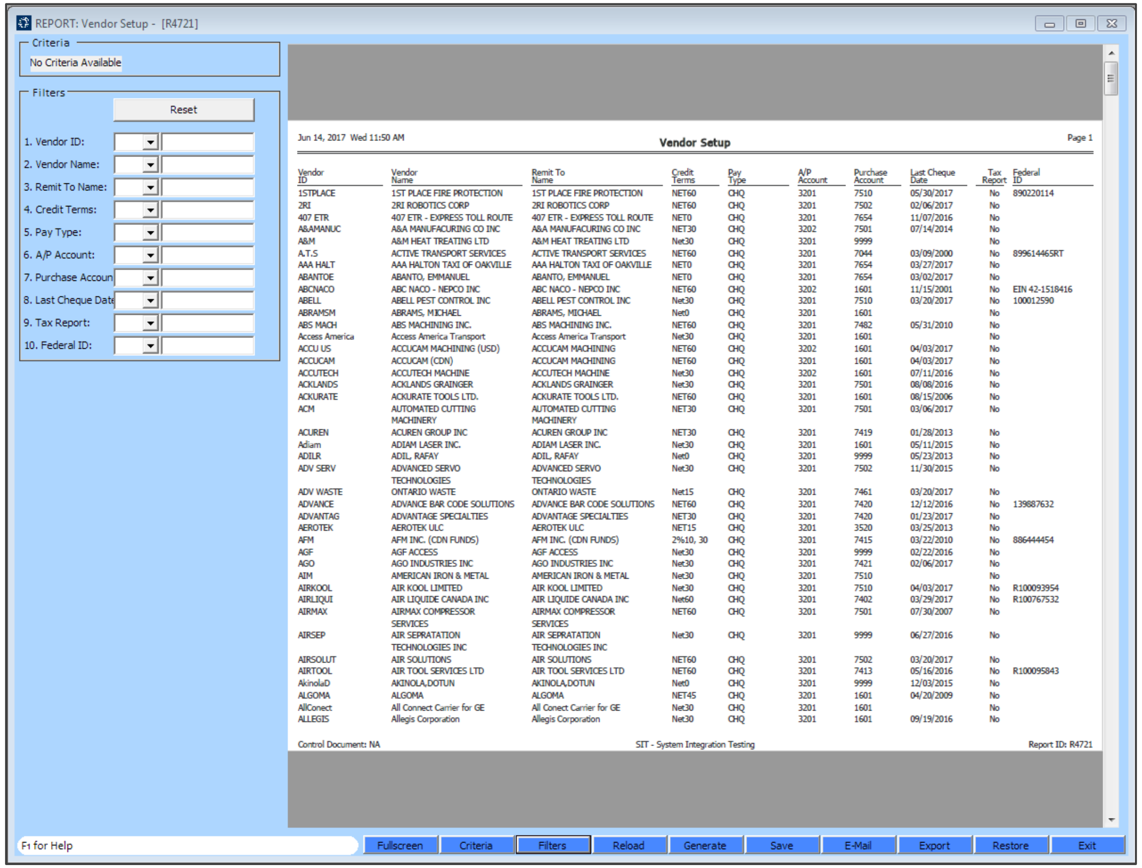
SELECTING AND CREATING CUSTOMIZED REPORTS

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.



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Vendor Setup

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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	
A&AMANUC	A&A MANUFACURING CO INC	A&A MANUFACURING CO INC	NET30	CHQ	3202	7501	07/14/2014	No	
A&M	A&M HEAT TREATING LTD	A&M 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	
ABCNACO	ABC NACO - NEPCO INC	ABC NACO - NEPCO INC	NET60	CHQ	3202	1601	11/15/2001	No	EIN 42-1518416
ABELL	ABELL PEST CONTROL INC	ABELL PEST CONTROL INC	Net30	CHQ	3201	7510	03/20/2017	No	100012590
ABRAMSM	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	
ACCU US	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	
ACKLANDS	ACKLANDS GRAINGER	ACKLANDS GRAINGER	Net30	CHQ	3201	7501	08/08/2016	No	
ACKURATE	ACKURATE TOOLS LTD.	ACKURATE TOOLS LTD.	NET60	CHQ	3201	1601	08/15/2006	No	
ACM	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	01/28/2013	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	139887632
ADVANTAG	ADVANTAGE SPECIALTIES	ADVANTAGE SPECIALTIES	NET30	CHQ	3201	7420	01/23/2017	No	
AEROTEK	AEROTEK ULC	AEROTEK ULC	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	
AIM	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
AIRLIQUI	AIR LIQUIDE CANADA INC	AIR LIQUIDE CANADA INC	Net60	CHQ	3201	7402	03/29/2017	No	R100767532
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	
AllConect	All Connect Carrier for GE	All Conect Carrier for GE	Net30	CHQ	3201	1601		No	
ALLEGIS	Allegis Corporation	Allegis Corporation	Net30	CHQ	3201	1601	09/19/2016	No	

Control Document: NA

SIT - System Integration Testing

Report ID: R4721

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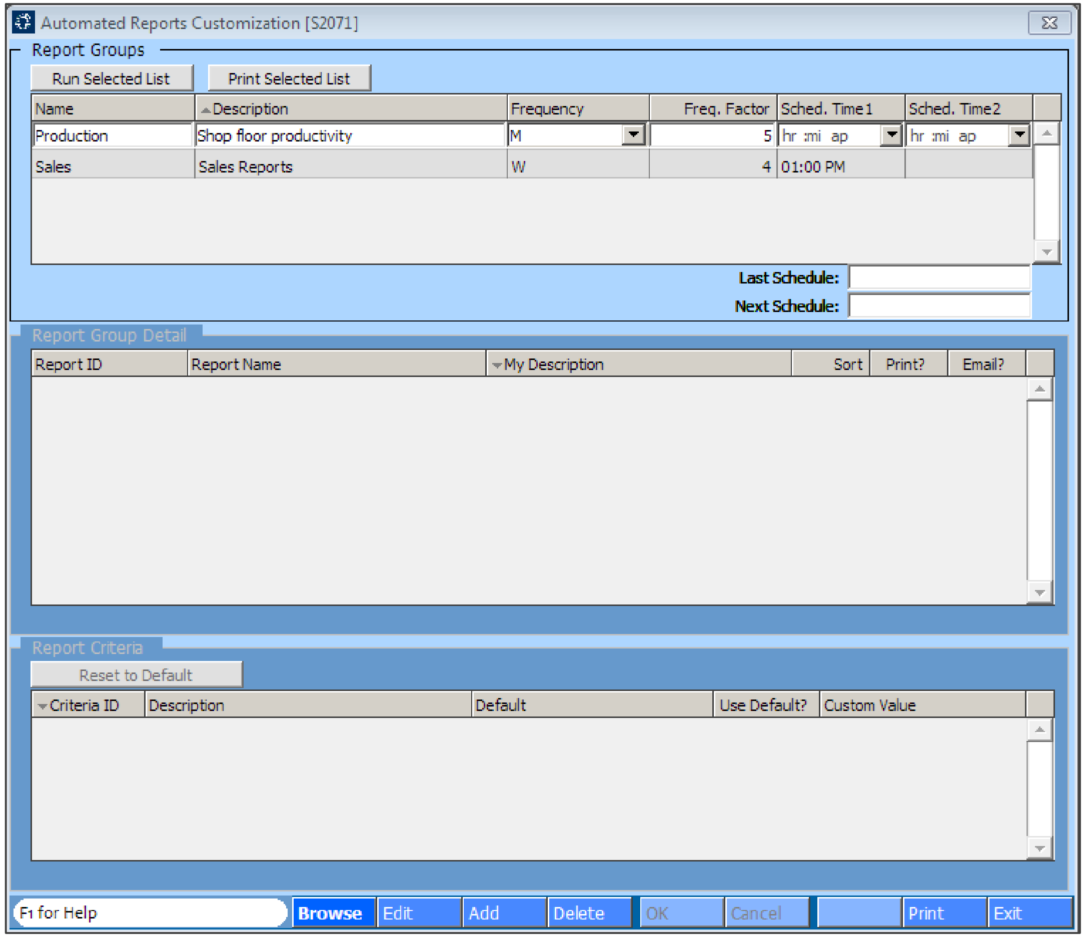
Running custom reports

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.

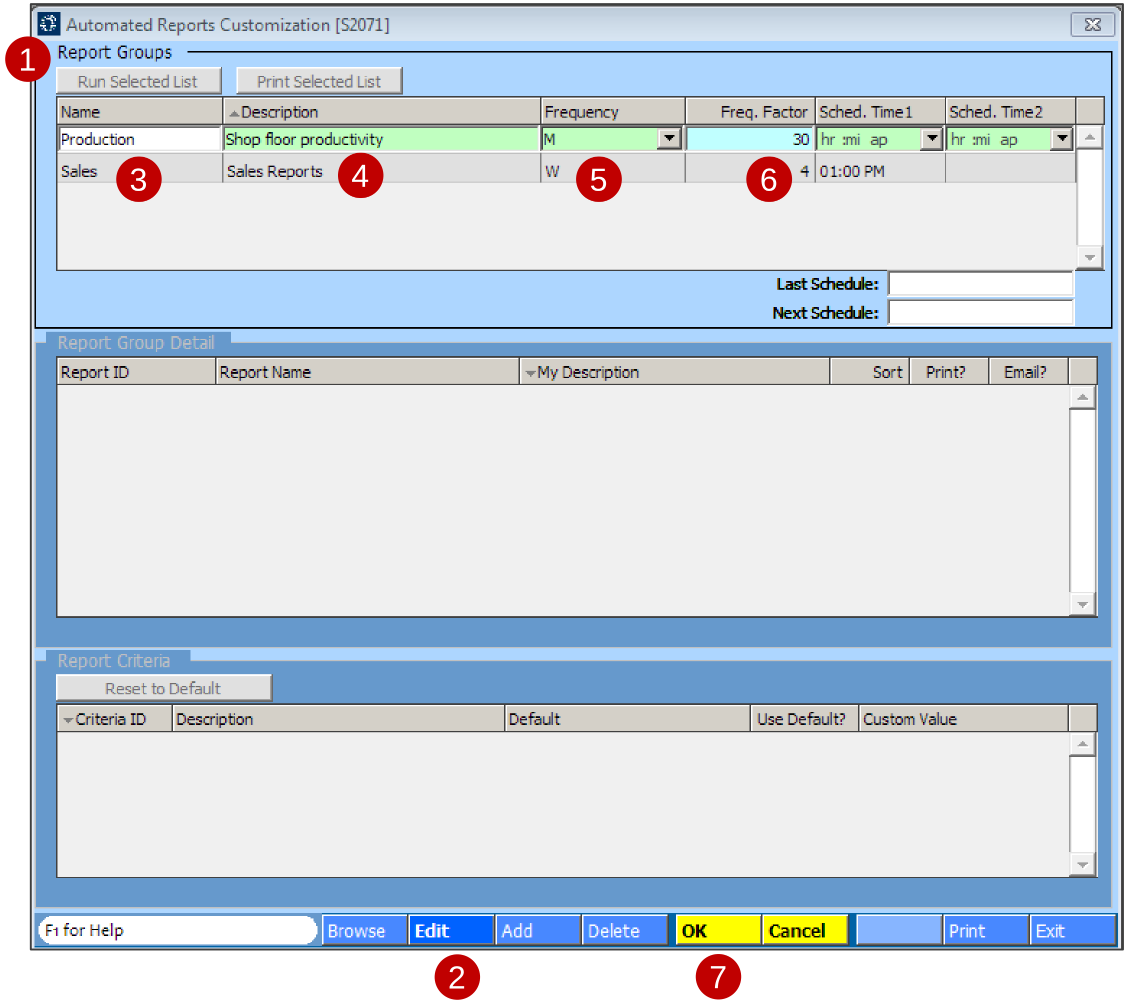
To open the **Automated Reports Customization [S2071]** screen, click on the “*My Report*” button on the **User Options and preferences [S2065]** screen.



Creating a report group

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

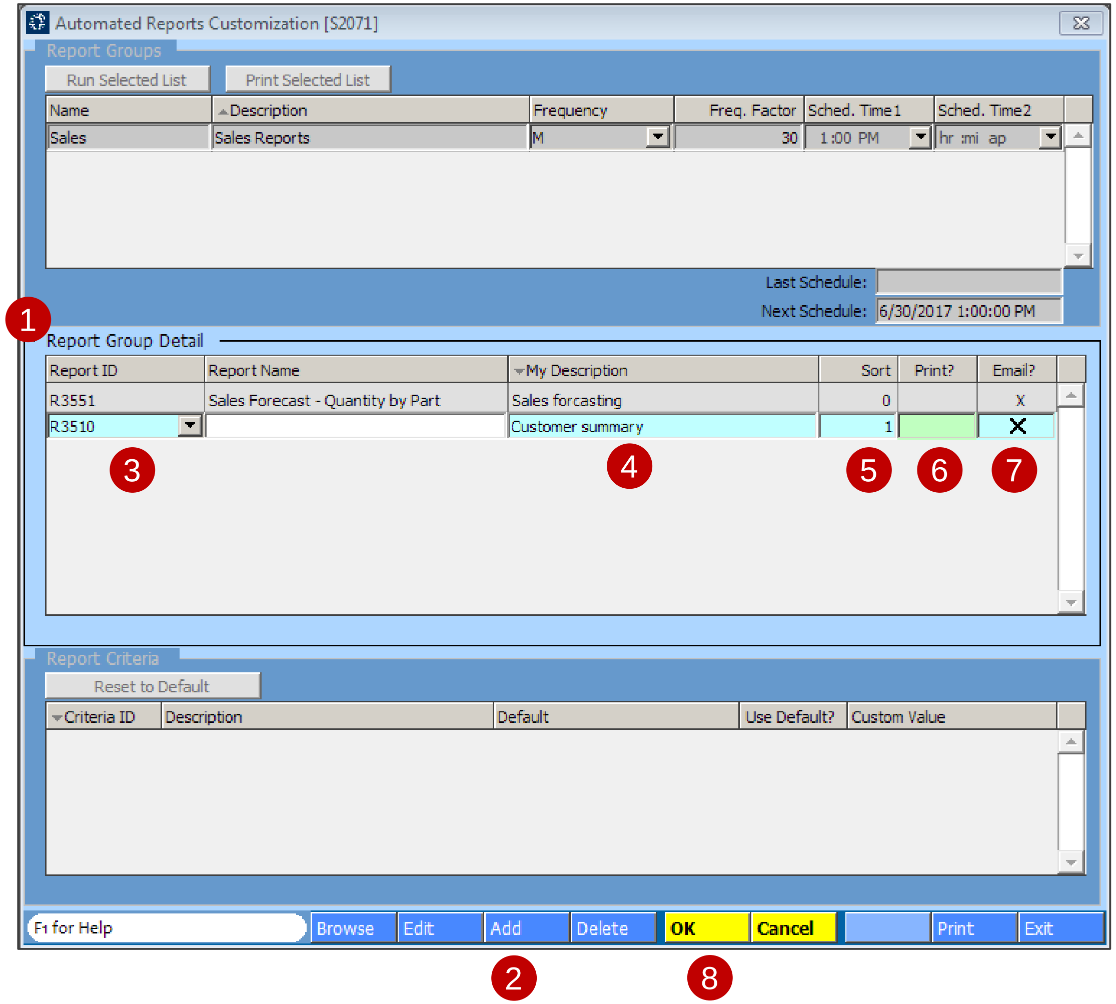
1. To create a new report group select the **Report Groups** frame.
2. Click the **Add** button in the bottom menu.
3. Give your report group a **Name**.
4. Enter a **Description** for your report group.
5. Select the **Monthly Frequency** option to receive the report on.
6. Enter 30 as a value for the **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.

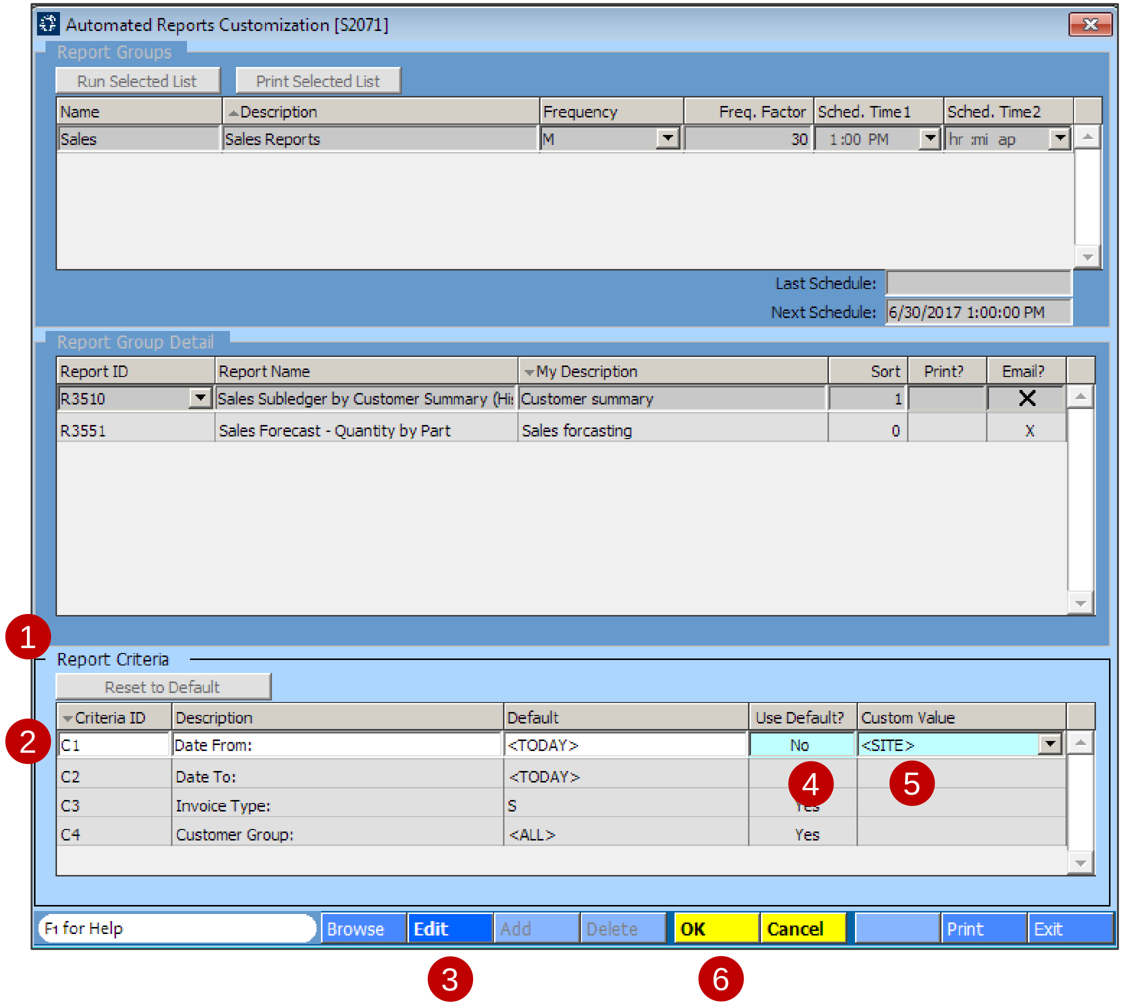
Note: *To add multiple reports for the same group, repeat the above process.*



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.



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]**.

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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.

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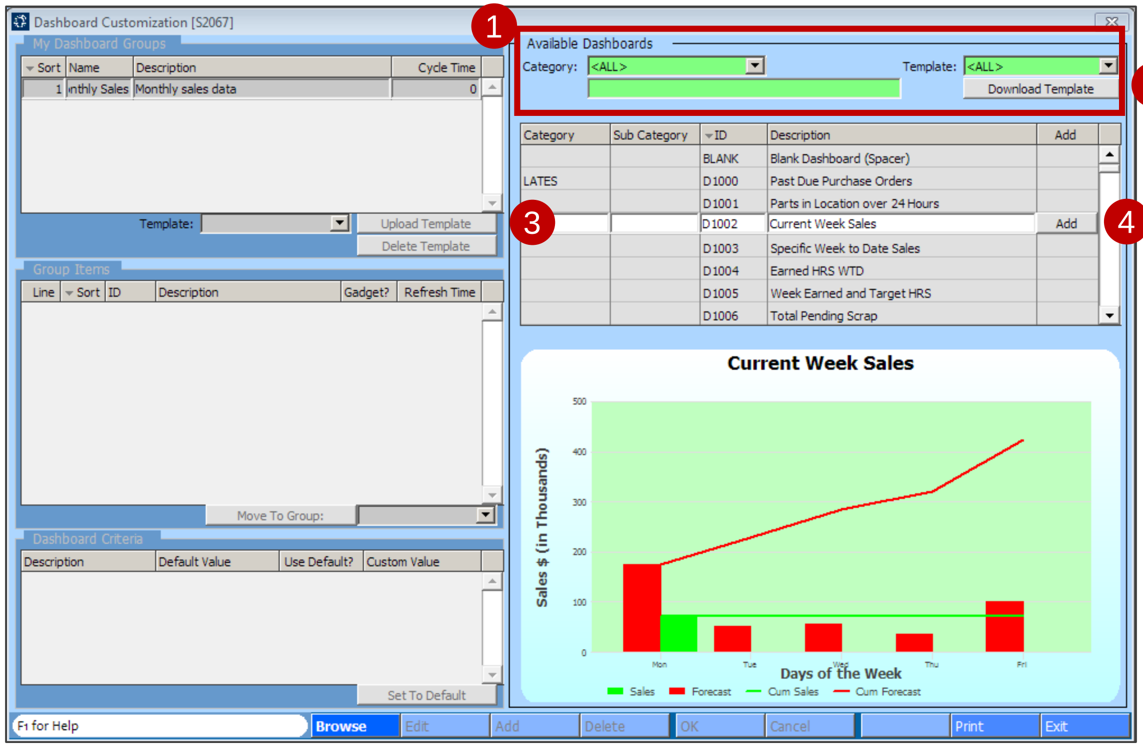
Adding the dashboards

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.



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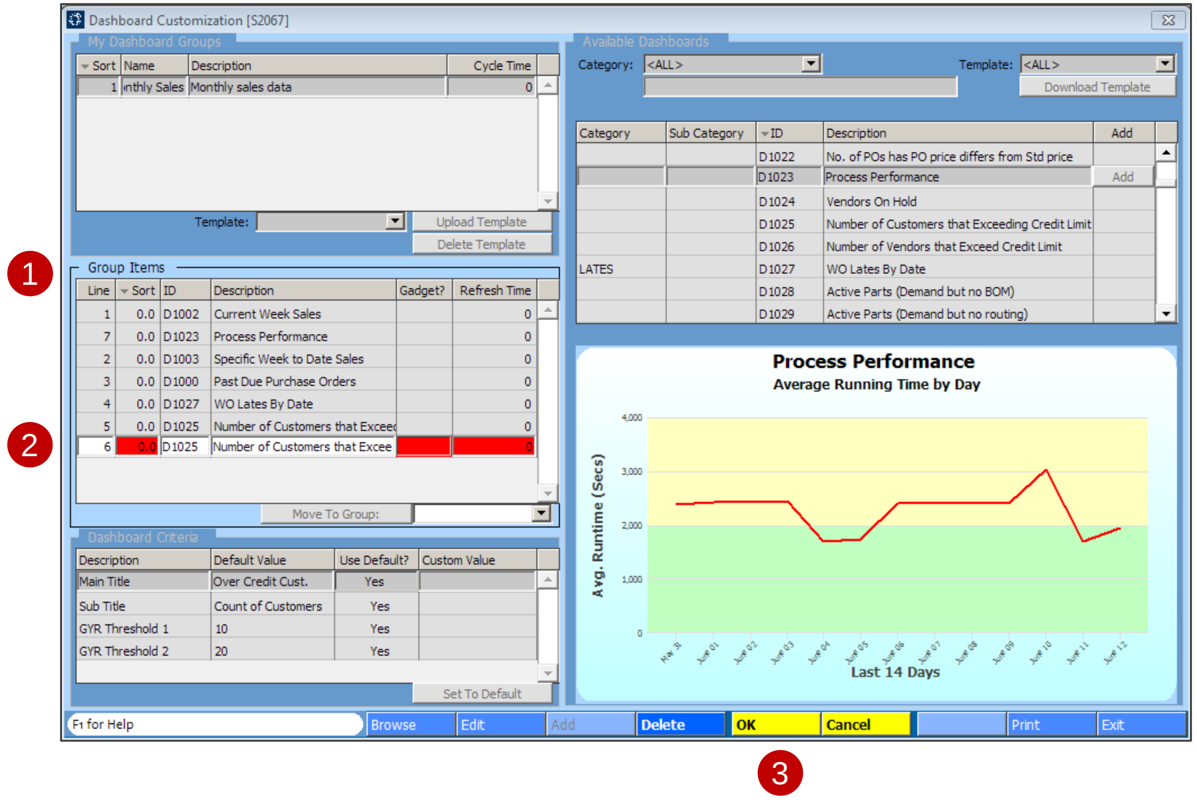
Managing the dashboards

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.



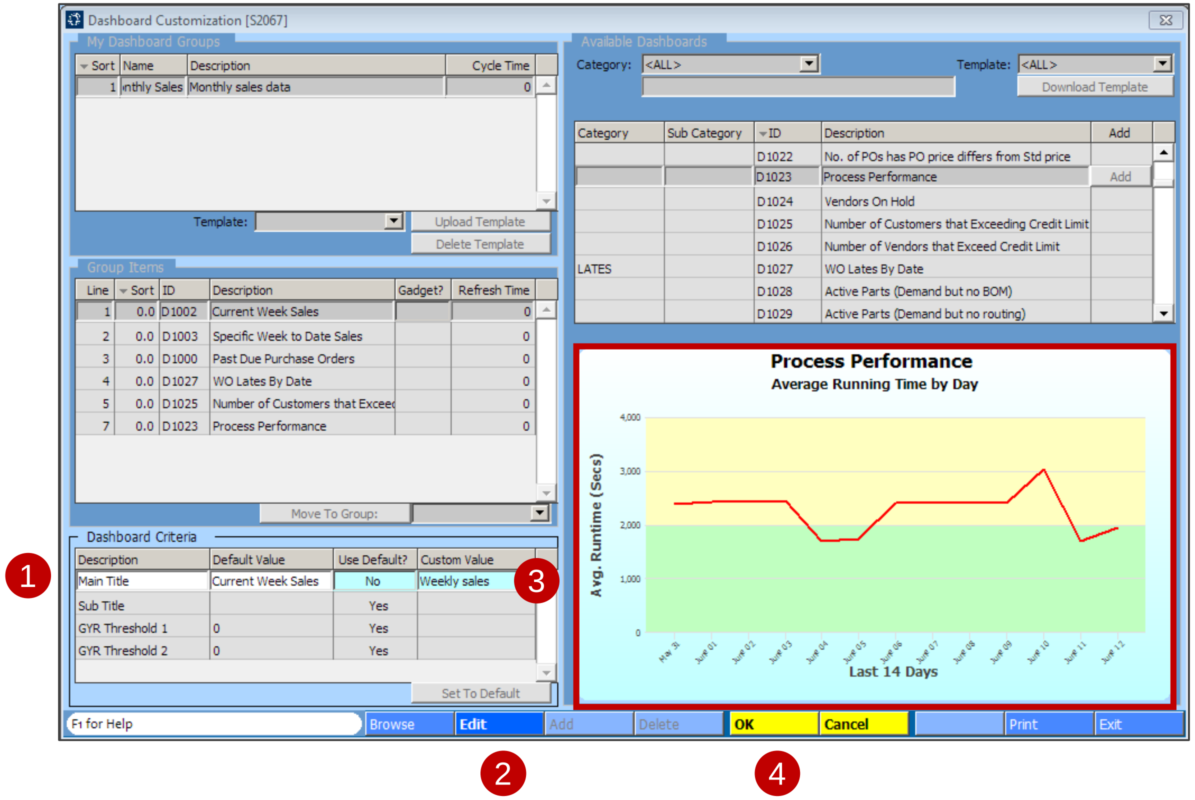
Modifying dashboard criteria

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.



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.