

The customizable reporting Dashboard allows users to organize charts and tables from any report category all in one place. Each user's Dashboard is made up of "panels", which can be added, removed, rearranged, or renamed. Dashboards can also be configured to have one or many tabs with varying column layouts.

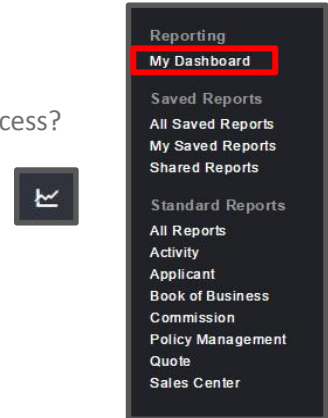
The Basics

REPORTS ACCESS

A user must have the appropriate permission to access reports. Need report access? Contact support@ezlynx.com.

To access Dashboard Reports:

1. Hover over the **Reports icon**; at the left of all EZLynx screens.
2. Select **My Dashboard**.



Dashboard Reports Features

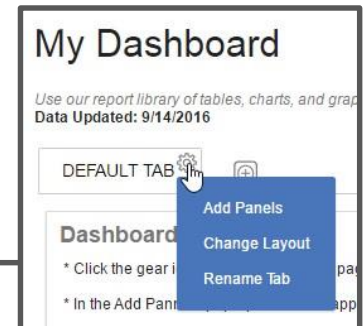
Dashboard Reports are interactive reports that are customized to each user's settings at runtime.

ADD PANELS FROM LIBRARY

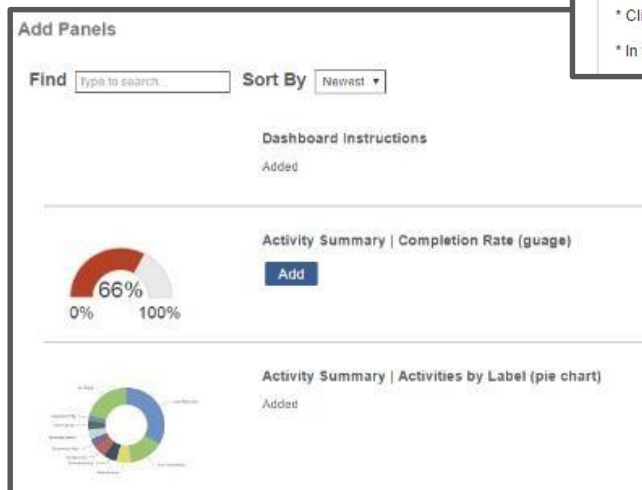
Each user can customize their own Dashboard. The Dashboard is filled with a series of panels, or widgets. You can create your own or choose from our library of Dashboard Panels.

To add a panel:

1. Click the **gear icon** on the tab to which you would like to add panels.
2. Select **Add Panels**.
3. Click **Add** for each of the panels you would like added to that tab
4. When finished, click **Done** or the **X icon**.



EZTIP: Use the **Find search box** to quickly locate a specific panel.



CUSTOMIZE OR REMOVE PANELS

Dashboard panels can be customized to suit your needs.

To customize or remove a panel:

1. At the top left of the Panel, click the **Gear icon**, from the menu select:
 - a. **Edit** – edit **Panel Parameters**, or filter options, such as date ranges (only available for select panels).
 - b. **Rename** – update the panel’s title.
 - c. **Remove** – removes the panel from the Dashboard; it is always available in the Report Library to add again, if desired.



ARRANGE PANEL COLUMNS

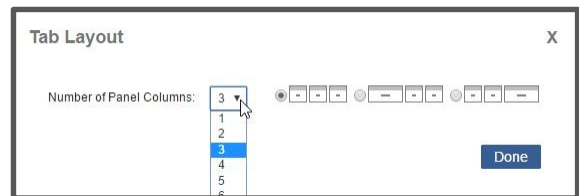
Panels can be rearranged within the columns.

1. To move a panel, click and drag the panel to a new location.

ADDING & CUSTOMIZING TABS

Dashboard Tabs can also be customized.

1. Locate the tab, and click its gear icon, and from the menu select:
 - a. **Change Layout** – change the number or layout of columns on the tab.
 - b. **Rename Tab** – update the tab’s title.



CREATE CUSTOM PANELS

Custom panels can be created from any Master Report.

To create a custom panel:

1. Open any **Master Report**.
2. Customize that report as desired (see the [Master Report Guide](#)).
3. Once the table or chart is complete, click the **Dashboard icon**.
4. Enter a Panel Title and Description, then click **Done**.
5. This panel is now available in the **Add Panels** pop-up, and is added to the top left corner of your Dashboard.



Questions? Contact support@ezlynx.com.