



DATAFLOW

Financial Software Solutions

Dashboard

Dear user,

You must make sure that you have read “Navigating the System” first before reading any other Clarity guides as without a good knowledge of the navigation you will not fully benefit from the features and shortcuts that Clarity will provide for you.

Click here to read Navigating the System:

https://dataflow.co.uk/images/uploads/release_notes/Clarity - Navigating the System .pdf

Also at the end of each guide, there may be a list of other supplements for further explanation of features within this routine.

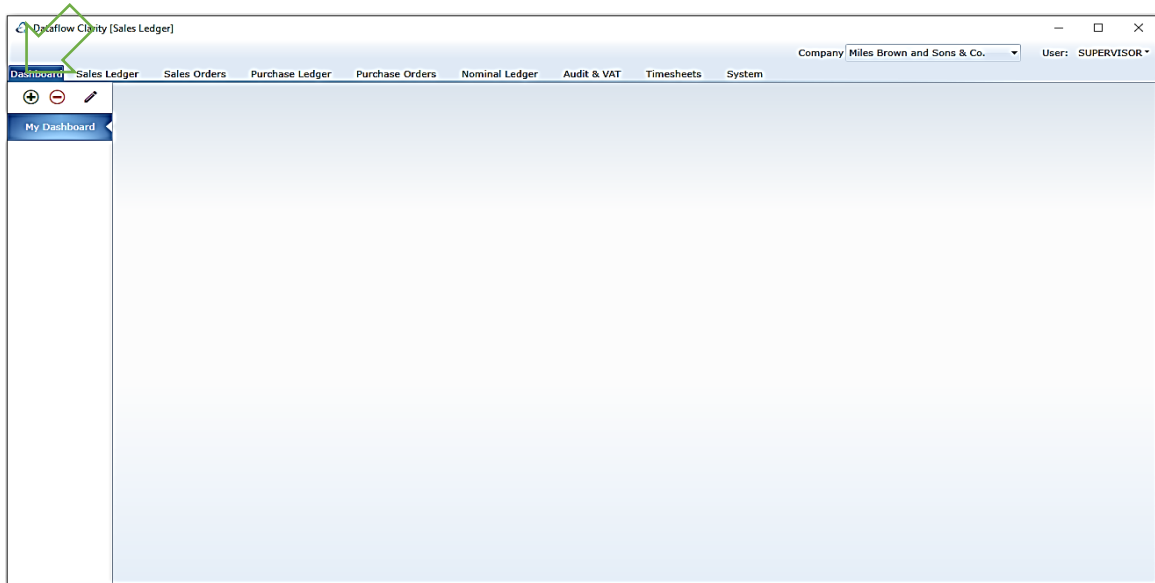
Enjoy exploring Clarity and please do not hesitate to suggest any improvement that you feel will be useful to add to this document.

Warmest regards

Dataflow (UK) Ltd





The Dashboard (green arrow below) consists of a left pane where you create new dashboards, remove or edit existing ones and the central dashboard area displaying the content of the selected dashboard.




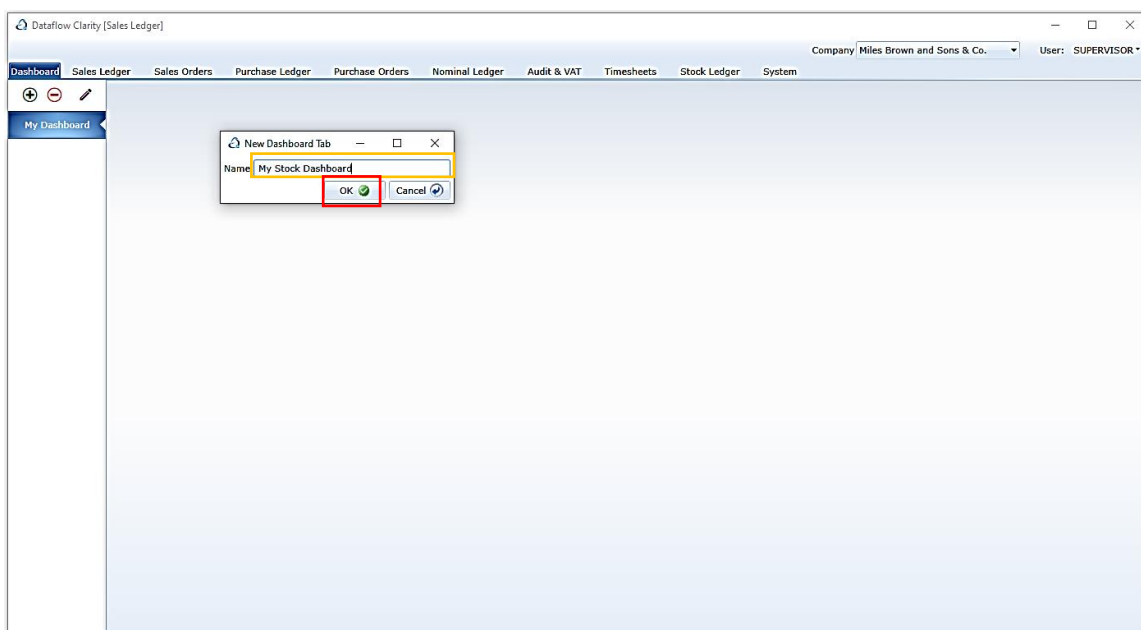
An existing dashboard label called *My Dashboard* will already exist by default (although there will be no content).

You can edit the existing *My Dashboard* label by clicking on the label and selecting the edit icon 

You can have as many dashboards as you wish. Create a new by clicking on 

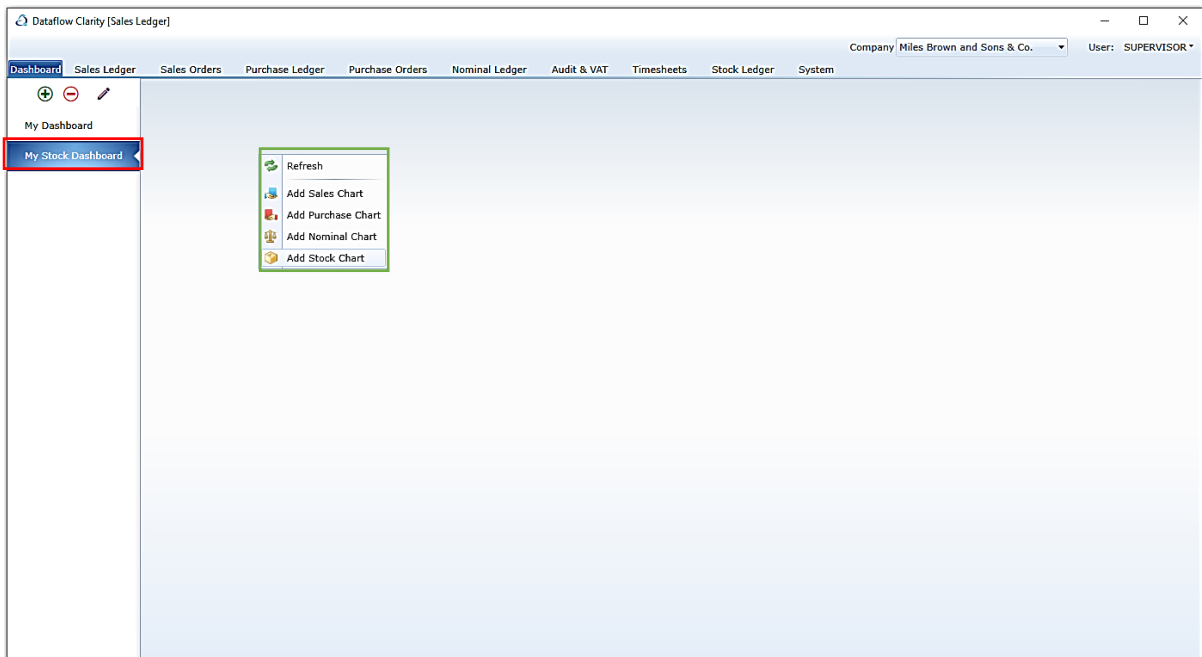
To remove an existing dashboard, select the dashboard you wish to remove and click the icon 

In the example below I've chosen to add a new dashboard. Clicking the  icon presents the New Dashboard tab where you enter a description for your new dashboard (highlighted below in yellow)

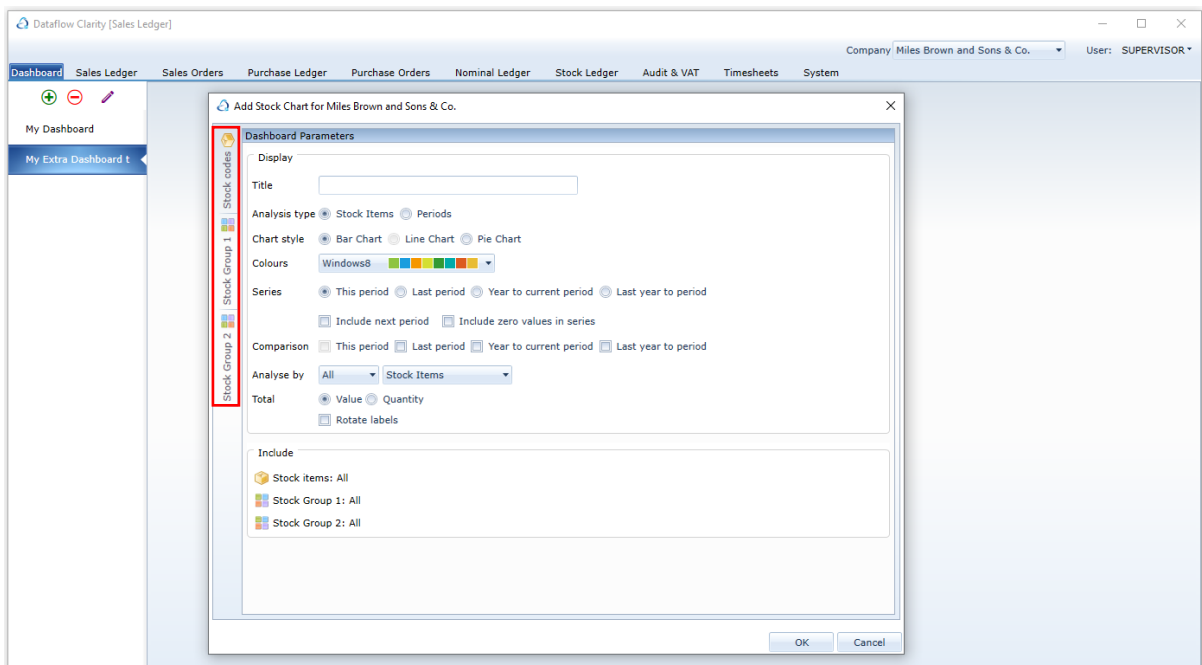


Clicking the OK button creates your new dashboard and lists it on the left pane (highlighted below in red).

To add a new chart to your dashboard simply right click in the central dashboard area. This will present a menu from which you chose the type of chart you wish to create (highlighted below in green). N.B. you will only see an option to add charts for the ledgers you have a Clarity licence for.

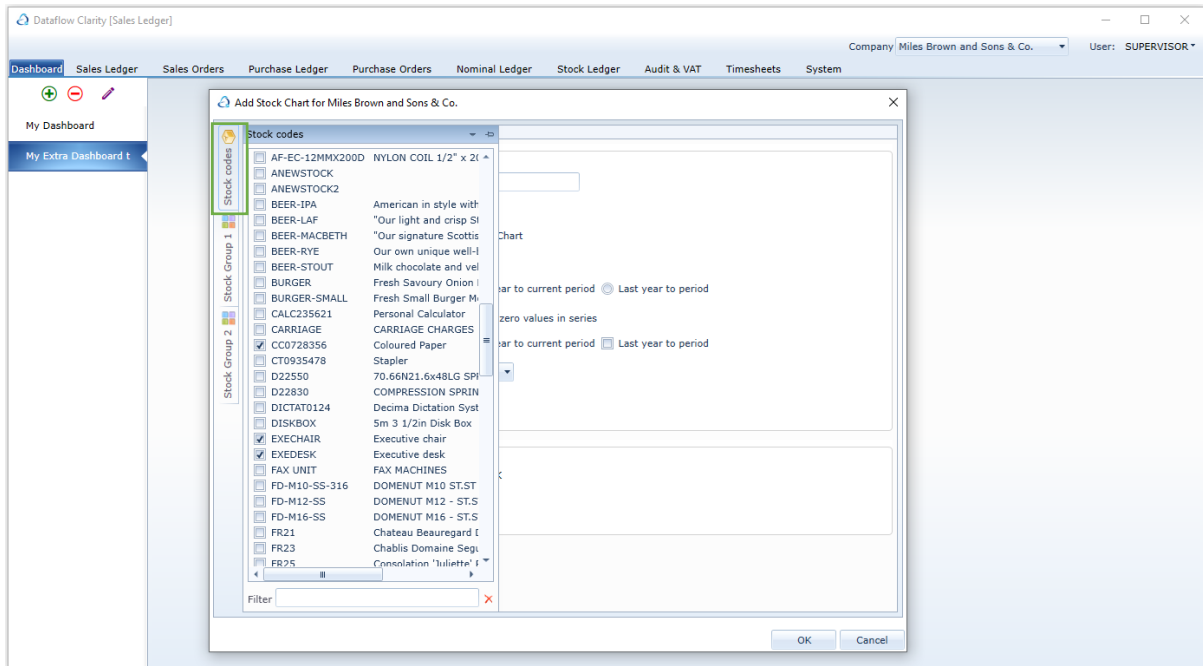


Having selected the type of chart you wish to create opens a new window where you define the parameters of your chart. In my example below I've chosen to add a Stock chart.



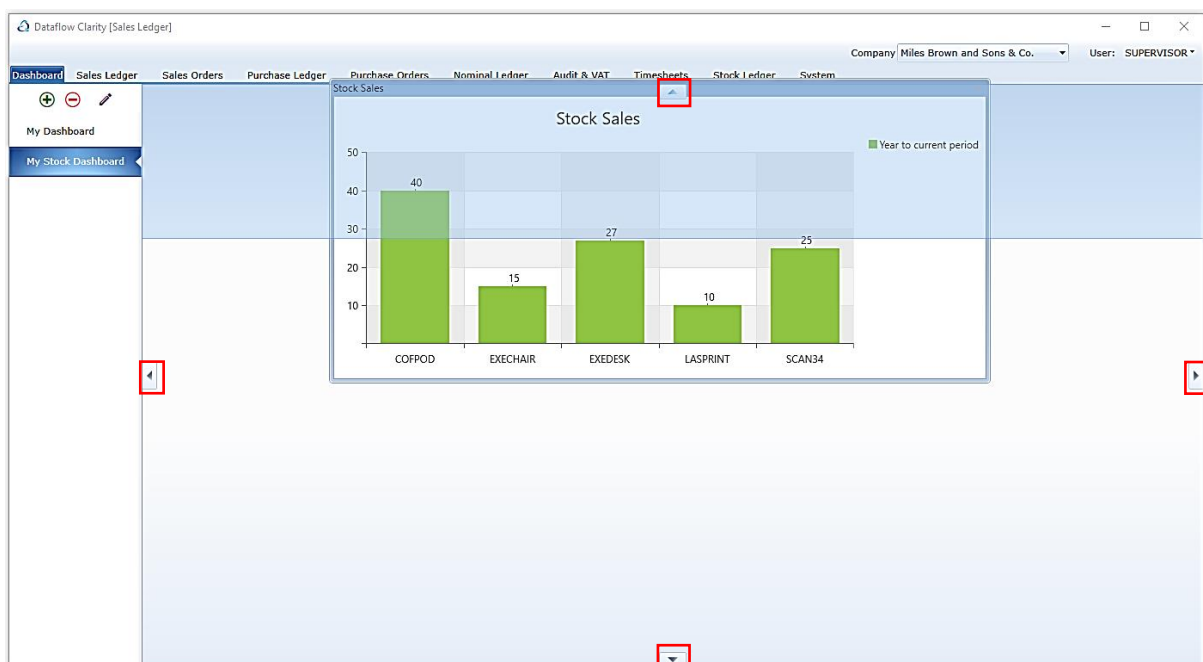
In addition to the main parameters there are tabs along the left edge of the window (highlighted above in red). These tabs allow you to apply filters to the chart. In this example I've chosen to select specific stock codes for my chart (highlighted below in green).

The number of filter tabs dependent on how many of the analysis reporting groups are activated in each ledger. For more information, please consult with one of our representatives.

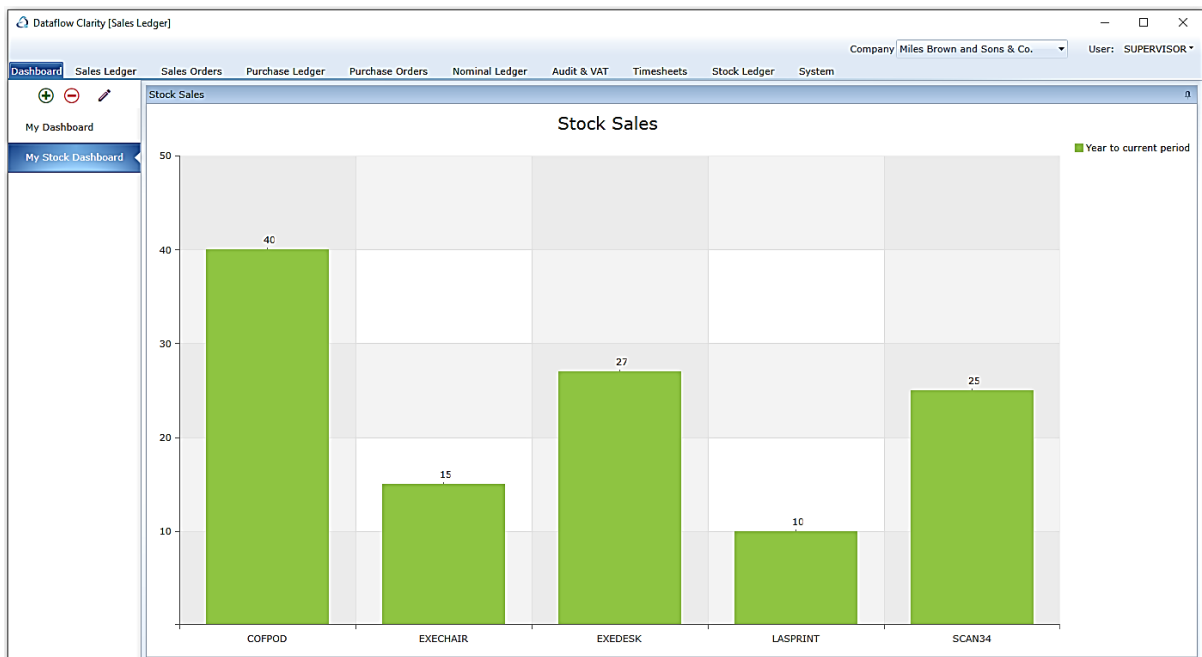


Once you've defined the parameters of your chart and clicked OK your chart will appear on the top left of your screen which you can drag, resize and move within your dashboard.

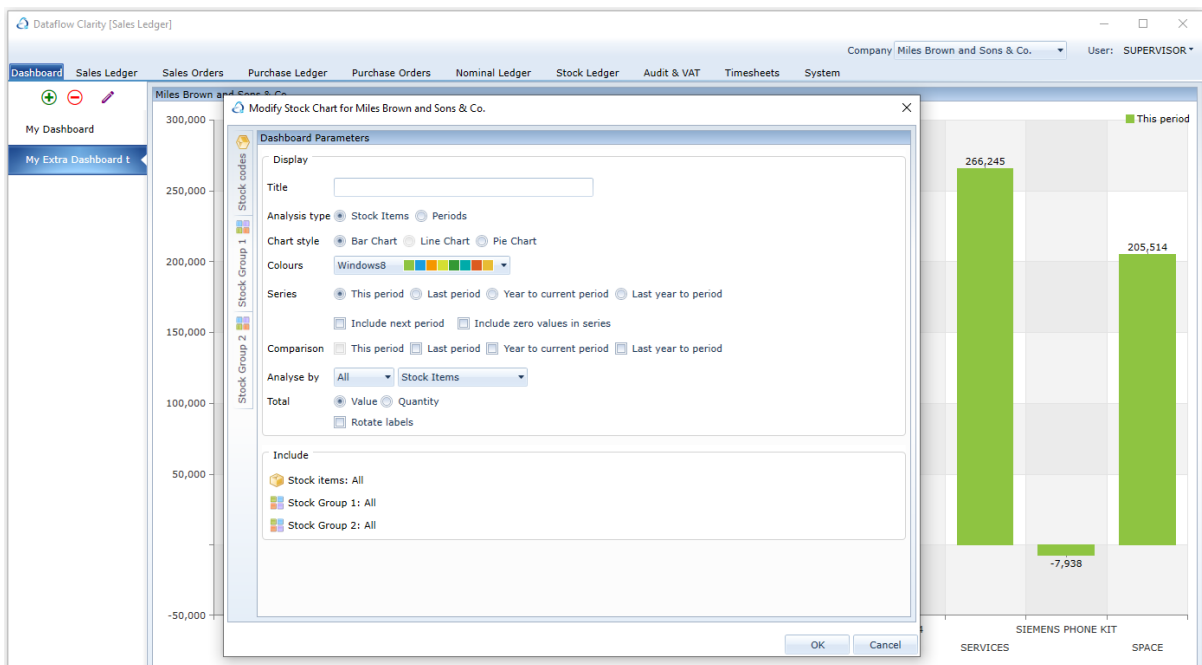
You're able to dock your charts to specific areas of your dashboard. To position your chart within your dashboard right click on the top blue bar of your chart to grab the chart and move it. Once you grab and start moving your chart four arrows will appear within the dashboard window (highlighted below in red). I've chosen to position my chart at the top so I have moved the chart over the top arrow. A blue area will appear confirming the positioning. Simply let go of the left mouse button to complete the positioning.



My Chart is now in position. As there is currently only a single chart it will take all available space within the dashboard, and at present does not appear to be positioned at the top as instructed.

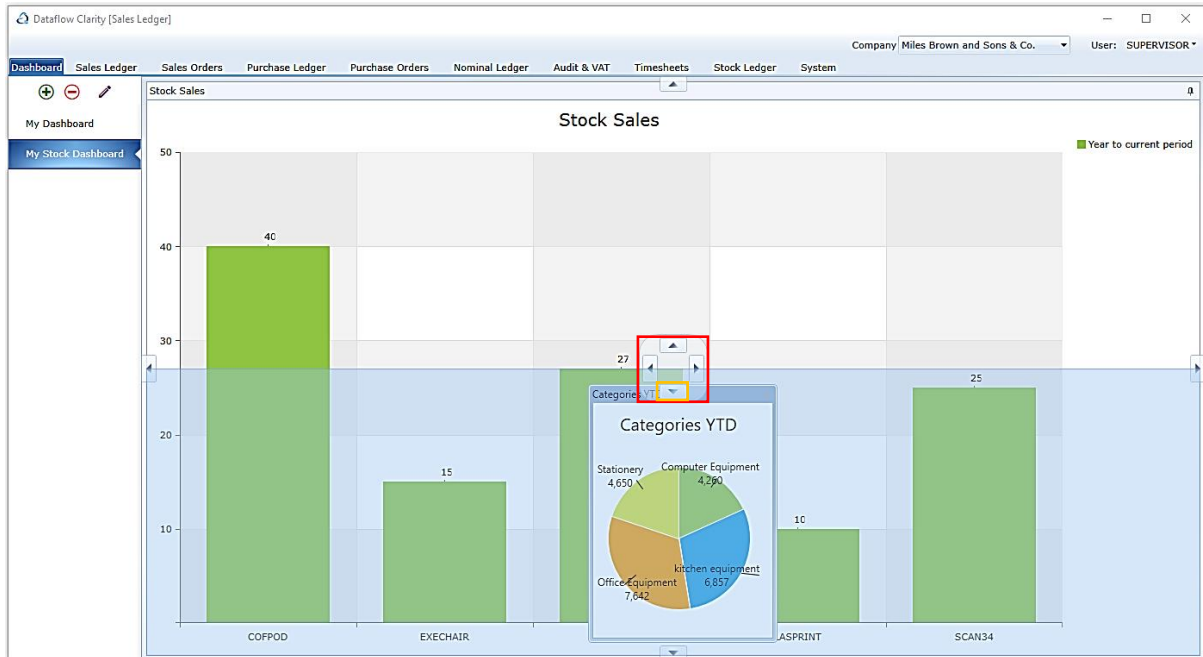


I'm now going to add an additional chart. Simply right click in the dashboard again to open the add chart option.

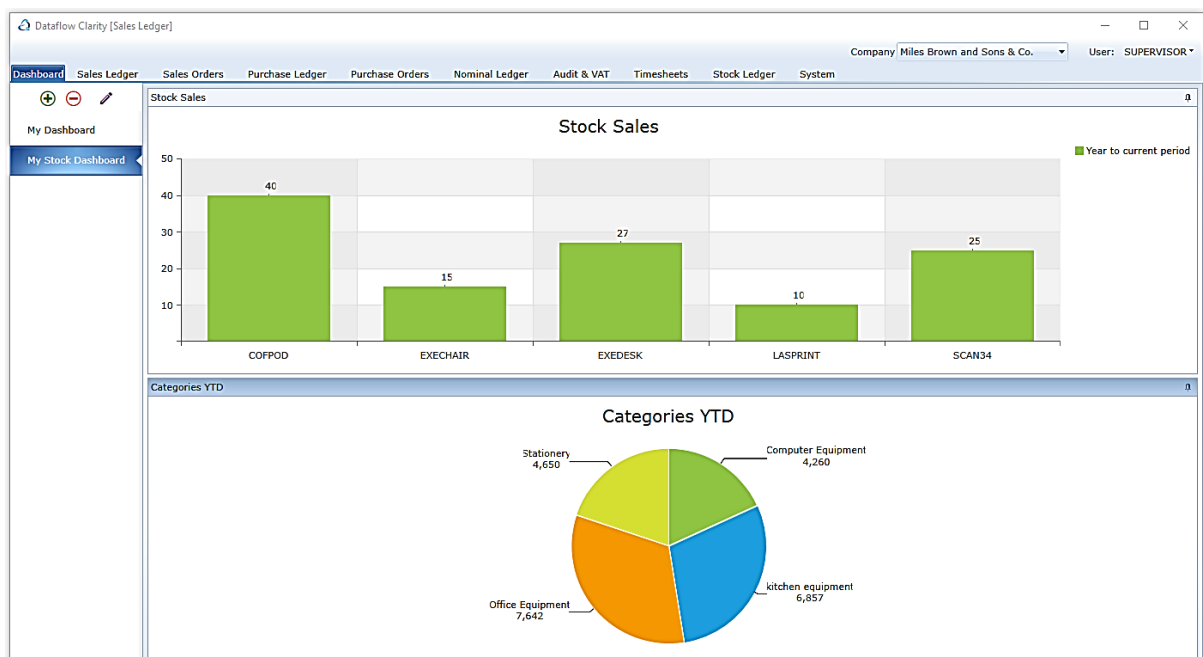


Now that there's more than one chart there are more positioning options when grabbing and moving the new chart. Note the central arrows highlighted below in red.

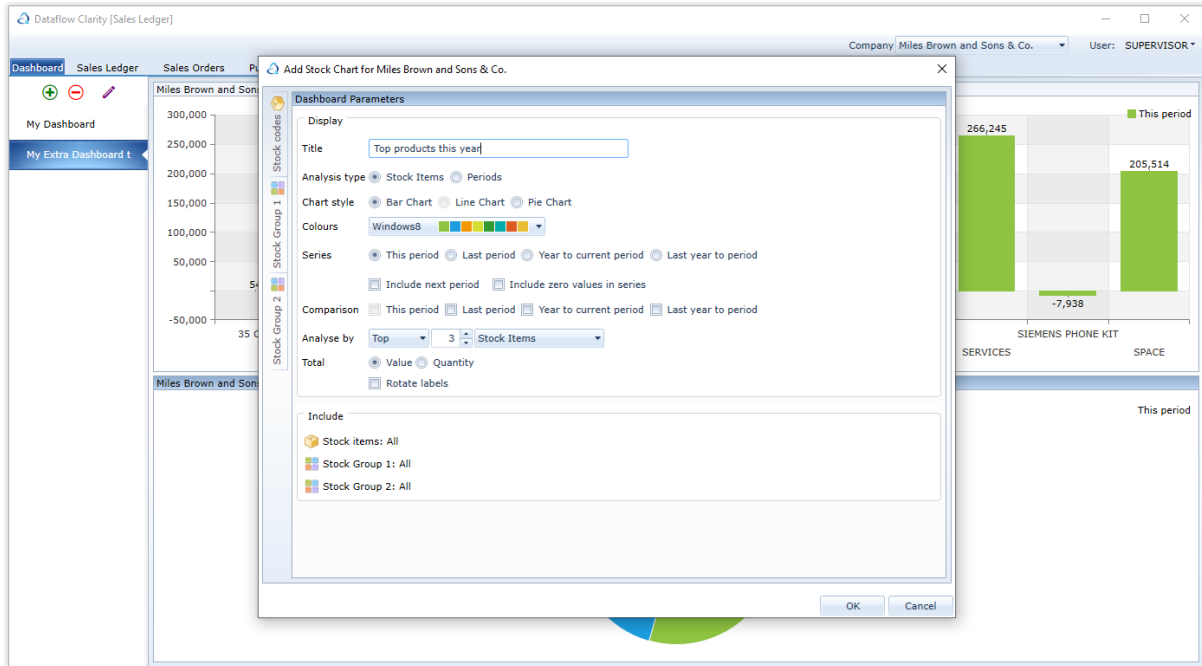
I'm choosing to position my new chart in the lower section of my dashboard by grabbing my chart and holding it over the bottom central arrow (highlighted below in orange).



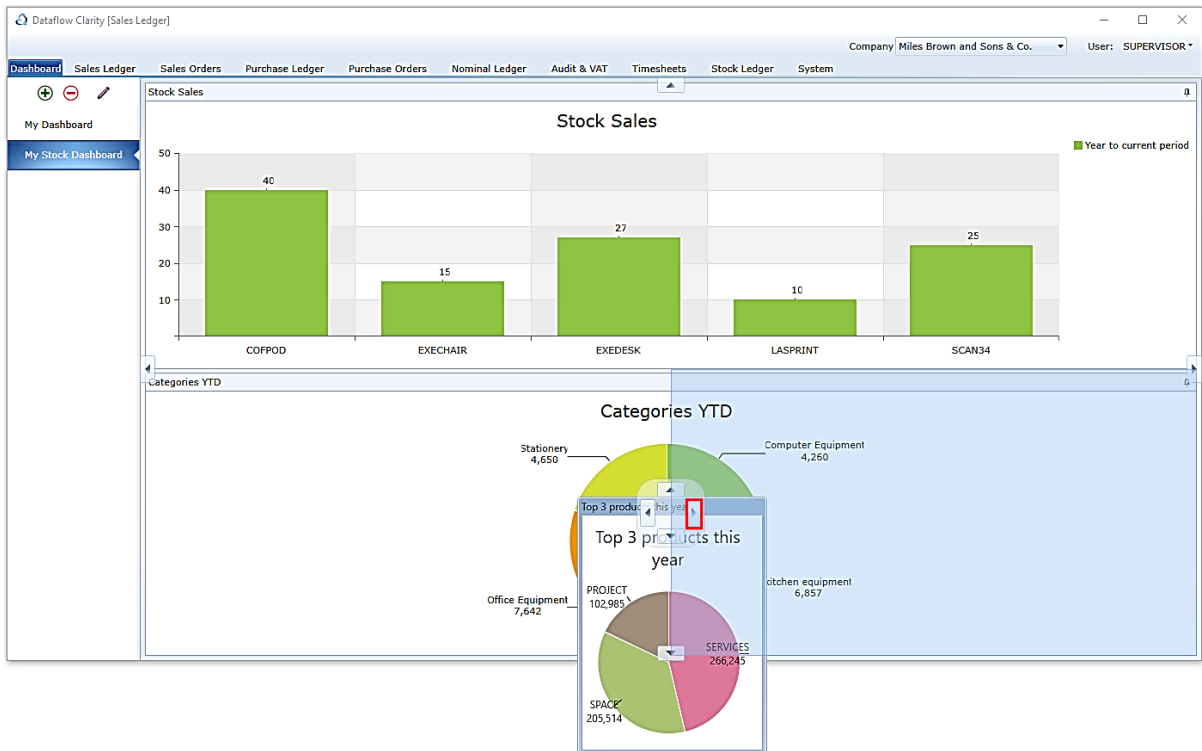
My new chart is positioned below.



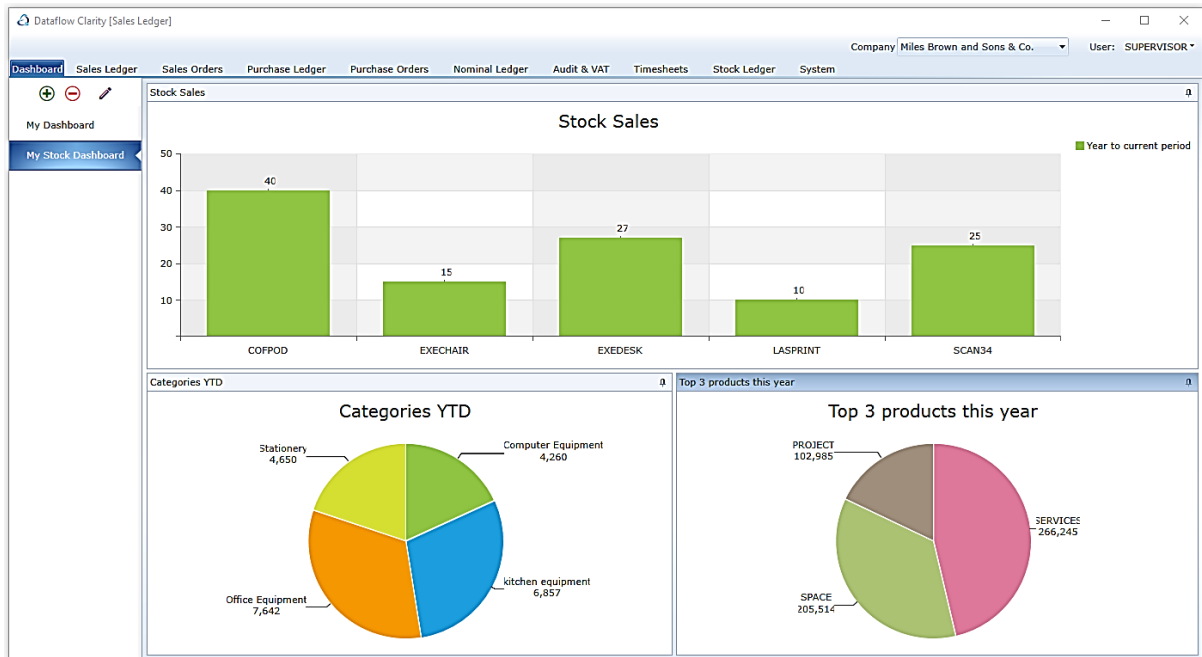
I've chosen to add a third chart.



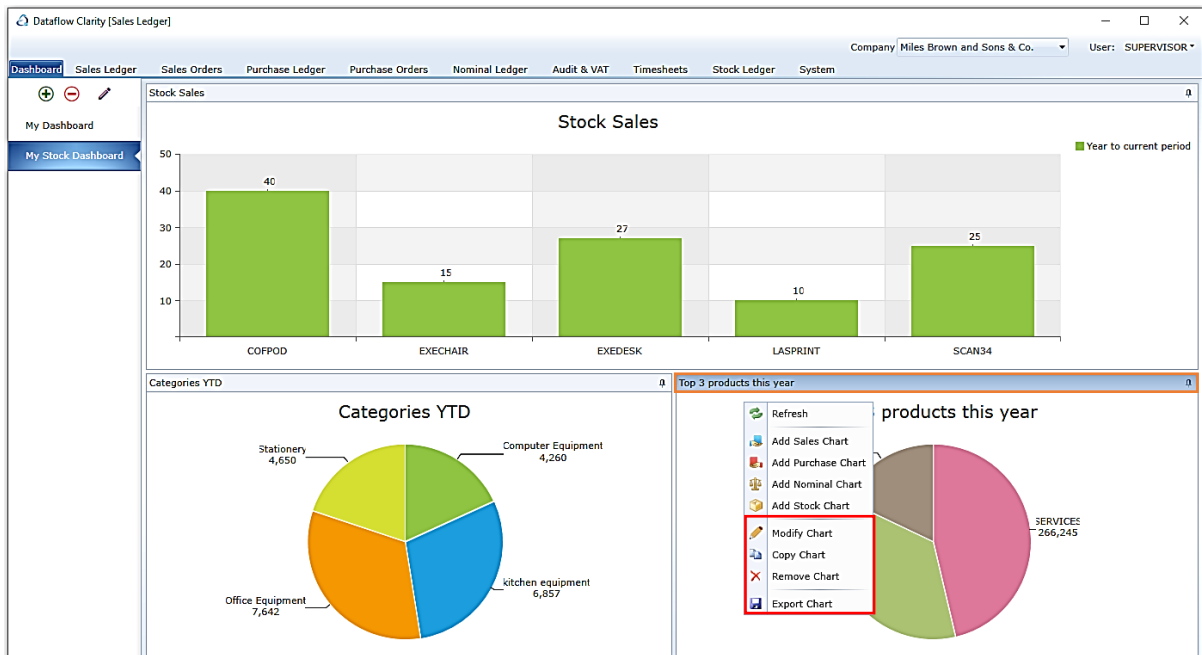
I've chosen to position my third pie chart in the same lower section of my dashboard along with and adjacent to my other pie chart. By grabbing and moving the chart in the lower section I receive the sectional arrow options, move over to the right arrow and the dashboard highlights the area the chart will appear. Release the mouse to confirm position.



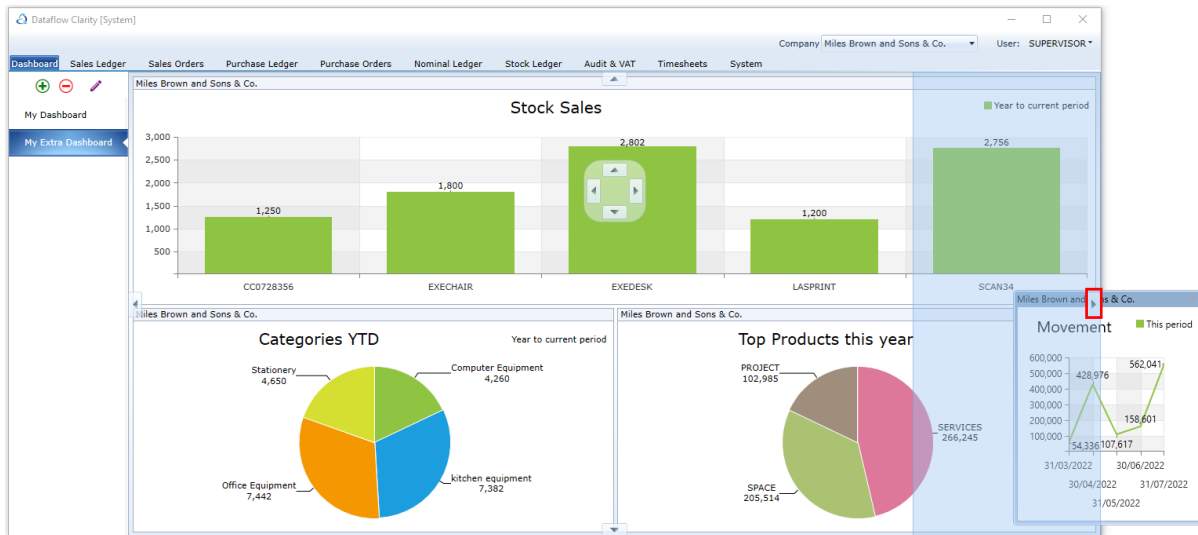
My third chart is now positioned.



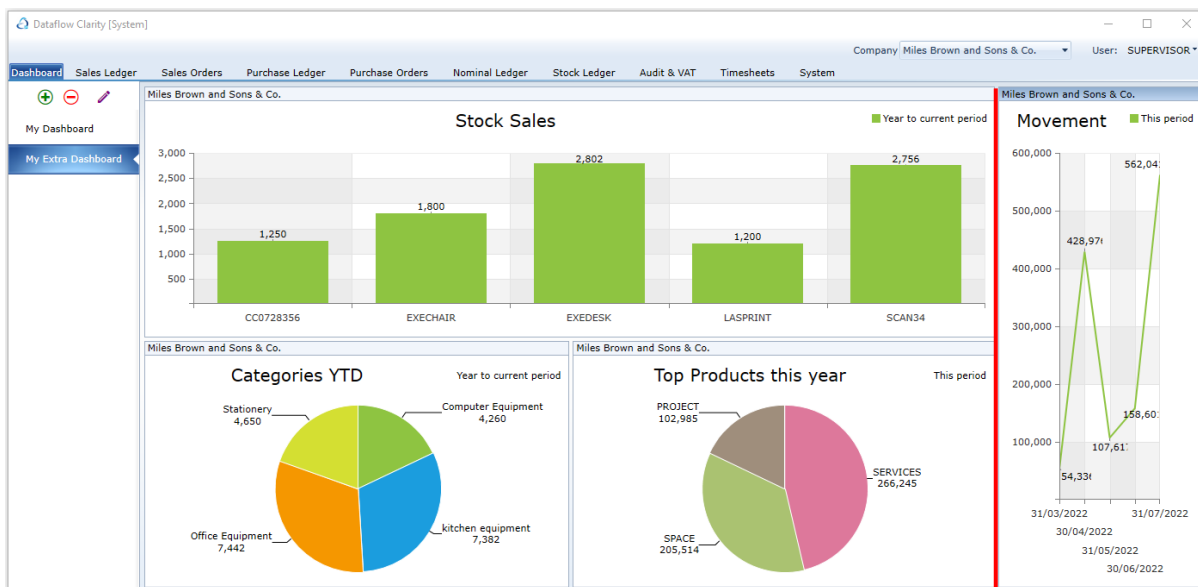
Once you've added a chart additional modify, copy, remove and export options will appear within the right click menu (highlighted below in red). To undock your charts, click and hold the left mouse button on chart banner (highlighted below in orange) and simply drag it out of its current position.

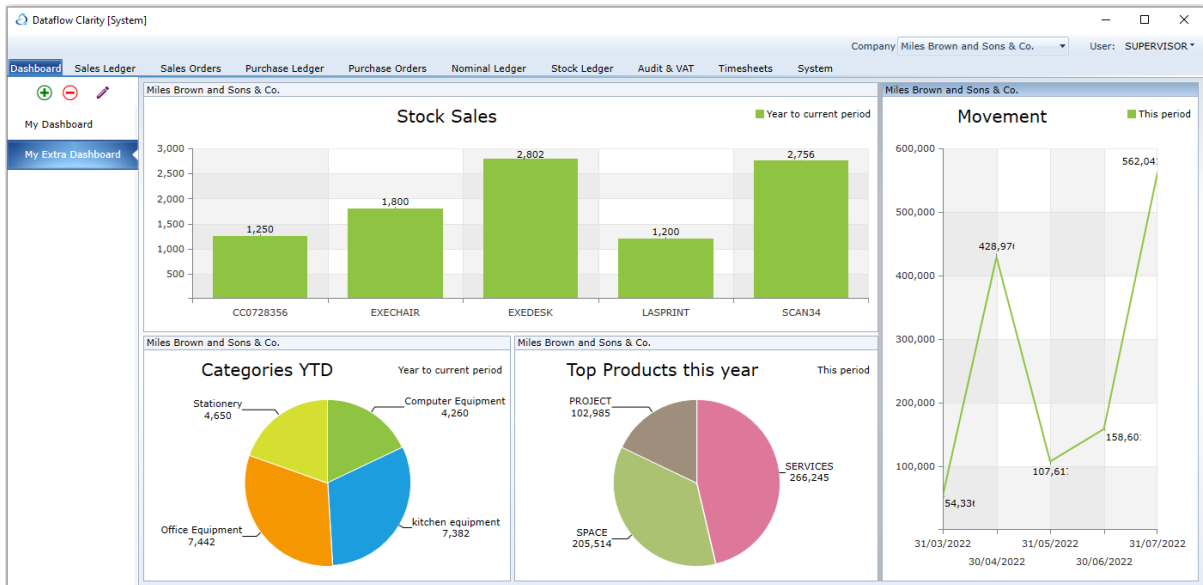


I've decided to add an additional chart but want it positioned along the entire right side of the dashboard. In order to have the chart positioned along the entire right side I need to drag the chart over to the far right edge which in turn presents a right side arrow (highlighted below in red). By holding the chart over the right side arrow the dashboard highlights the area the chart will appear. Release the mouse to confirm position.

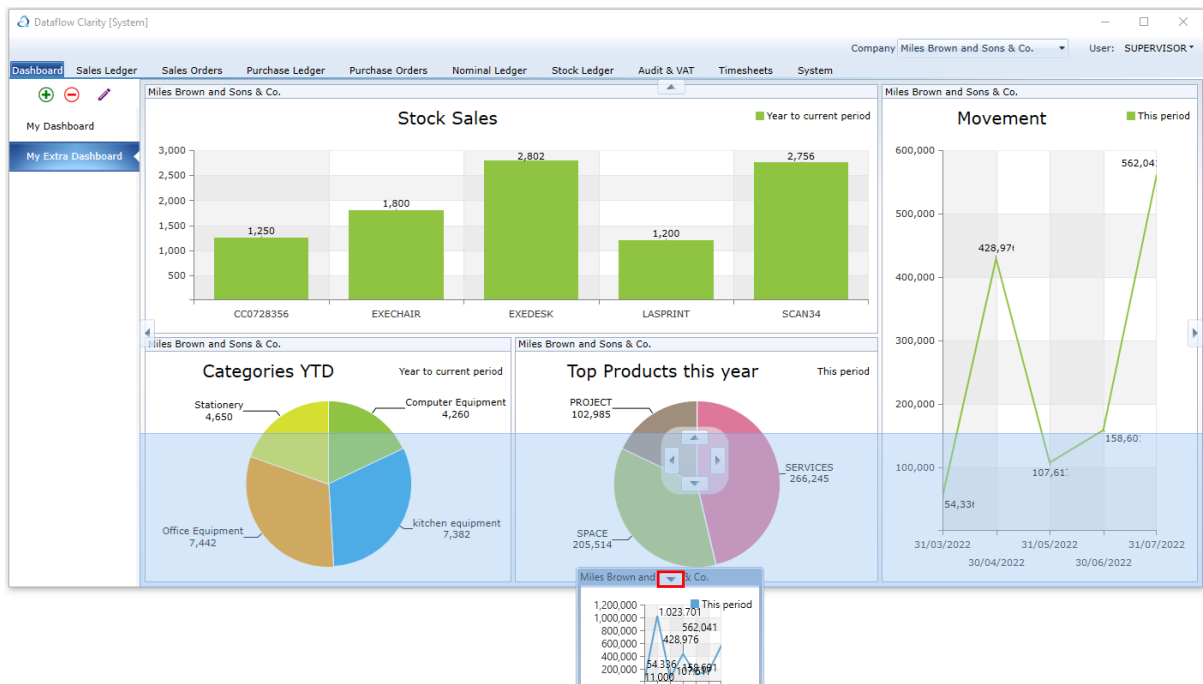


My new chart appears to be a bit squashed over on the right side. Hover the mouse over the left edge of the chart (highlighted below in red) and you'll receive a double ended arrow (\leftrightarrow), using the double ended arrow drag the line to increase the width of the chart to the desired size.





You may add as many charts as you wish to a single dashboard, however, the more you add the more position and size play their part. Wherever you drag your new chart within the dashboard you'll be presented with positional arrow options, the more charts you have the more positional arrow options you'll have. Dragging my new chart over the lower arrow (highlighted below in red) the dashboard highlights the area the chart will be visible once I release the mouse.



The existing charts will be automatically re-sized to accommodate the new addition. Remember you can undock your charts and re-position them by grabbing the chart banner (highlighted below in orange) and dragging it out of its current position.

