

# iRemit Dashboard

## User Guide

Version 7

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# Contents

iRemit Dashboard .....	4
Home page .....	4
Dashboard Reports home page .....	4
Dashboard settings .....	5
Change the report sort order .....	6
View report details .....	7
Sort the report columns .....	7

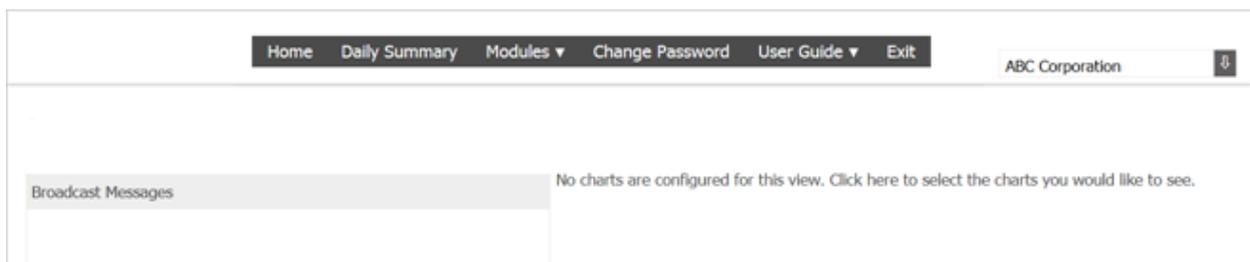
# iRemit Dashboard

The iRemit Dashboard allows you to easily view reports relevant to your needs. You can quickly and easily customize which reports you want to view from the Dashboard home page. You can add up to three reports to your home page for quick reference, and unlimited dashboard options under the Dashboard Module.

The iRemit administrator assigns Dashboard privileges to users and determines the types of reports they can access. Options available include CDM and PPW.

## Home page

The first time you log in to the application, a message appears to the right of the **Broadcast Messages** box that alerts you to the fact that you can configure the Dashboard with the charts you would like to see.



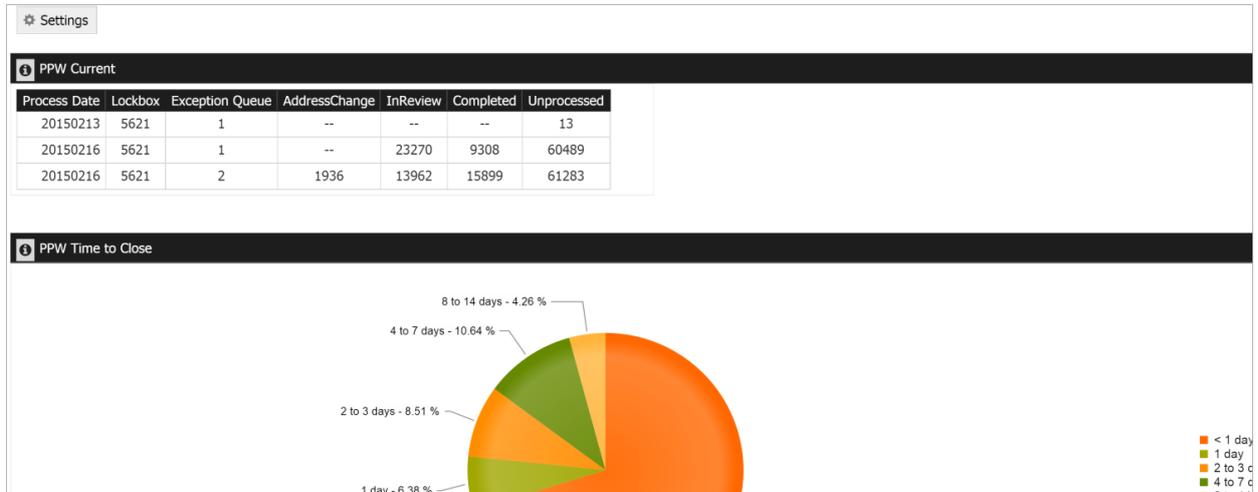
To access the Dashboard configuration page, hover the mouse over the message, then click on the message. See [Dashboard settings](#) for information on how to configure your Dashboard.

## Dashboard Reports home page

The **Dashboard** sub-menu of the **Modules** menu allows you to:

- Customize the reports you wish to view on the **Home** page and the **Dashboard Home** page
- View existing reports
- View details of existing reports

To open the **Dashboard Reports** home page, select the **Dashboard** sub-menu option. Reports that are visible have been previously selected from the Dashboard settings.



## Dashboard settings

You can configure your dashboard either from the hyperlink on the home page during the initial login, or by clicking the **Settings** button on the **Dashboard Modules** page to customize the reports you wish to view.

The **Dashboard Configuration** window consists of a list of all the reports available to you, and two columns of check boxes: **Home** and **Dashboard**.

**Dashboard Configuration** ✕

	Visible On	
	Home	Dashboard
CDM Current by Amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CDM Current by Amt all Boxes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CDM Current by Count		<input type="checkbox"/>
CDM Current by Count all Boxes		<input type="checkbox"/>
CDM Historic Sweeps by Amount		<input type="checkbox"/>
CDM Historic Sweeps by Count		<input type="checkbox"/>
LTA 30-day Summary By Amount		<input type="checkbox"/>
LTA 30-day Summary By Count		<input type="checkbox"/>

Cancel Save

The **Home** column lists the reports that can be seen on the **Home** page when you log on to the system. You can view a maximum of three reports on your **Home** page.

The **Dashboard** column lists the reports that can be seen on the **Dashboard Home** page when you choose the **Dashboard** sub-menu from the **Modules** menu. The number of reports that can be chosen in this column is not restricted.

After you have chosen three reports in the **Home** column, the remaining check boxes are hidden from view, as in the example above. To view all available reports again in the **Home** column, clear one of the check boxes in the **Home** column. You can then select from any of the available reports, up to a maximum of three.

**Dashboard Configuration** ✕

	Visible On	
	Home	Dashboard
CDM Current by Amount	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CDM Current by Amt all Boxes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CDM Current by Count	<input type="checkbox"/>	<input type="checkbox"/>
CDM Current by Count all Boxes	<input type="checkbox"/>	<input type="checkbox"/>
CDM Historic Sweeps by Amount	<input type="checkbox"/>	<input type="checkbox"/>
CDM Historic Sweeps by Count	<input type="checkbox"/>	<input type="checkbox"/>
LTA 30-day Summary By Amount	<input type="checkbox"/>	<input type="checkbox"/>
LTA 30-day Summary By Count	<input type="checkbox"/>	<input type="checkbox"/>

Cancel Save

Select as many reports as you would like to be shown on the **Dashboard** menu, then click **Save**. The **Dashboard Home** page is displayed with all selected reports. You may need to scroll down to view all of the reports on the screen. Reports default to the order listed in the **Dashboard Configuration** pop-up and can be re-sorted to fit your preference.

## Change the report sort order

You can change the order in which the reports appear on the **Home** page and the **Dashboard Home** page. Click on the heading of a report, then, holding down the mouse button, drag the report to the new position and release the mouse button.

CDM Current by Count					
CDM Current by Amount					
Check Only	5621	51	3	27	54
Out of Balance	5621	145	--	30	--

LTA Current		
Lockbox	Amount	
05631	\$4,989.83	
5621	\$6,422.81	
5621	\$12,845.62	

## View report details

To view the report details, click on the left side of the report heading.

CDM Current by Amount		
Batch Type	Lockbox	
Account Number Validation	5	

## Sort the report columns

Certain reports contain columns of information rather than charts. You can sort these reports by clicking on a column heading. Click once to sort in ascending order, click two times to sort in descending order, and click a third time to remove sorting.

CDM Current by Amount					
Batch Type	Lockbox	Accepted	Hold	NoDecision	Rejected
Account Number Validation	5621	\$9553.52	\$1223.40	\$13823.18	\$471.33
Check Only	5621	\$5067.26	\$370.35	\$2481.45	\$285.18
Out of Balance	5621	\$13063.55	--	\$3653.40	--