nHanced 365
Product Documentation

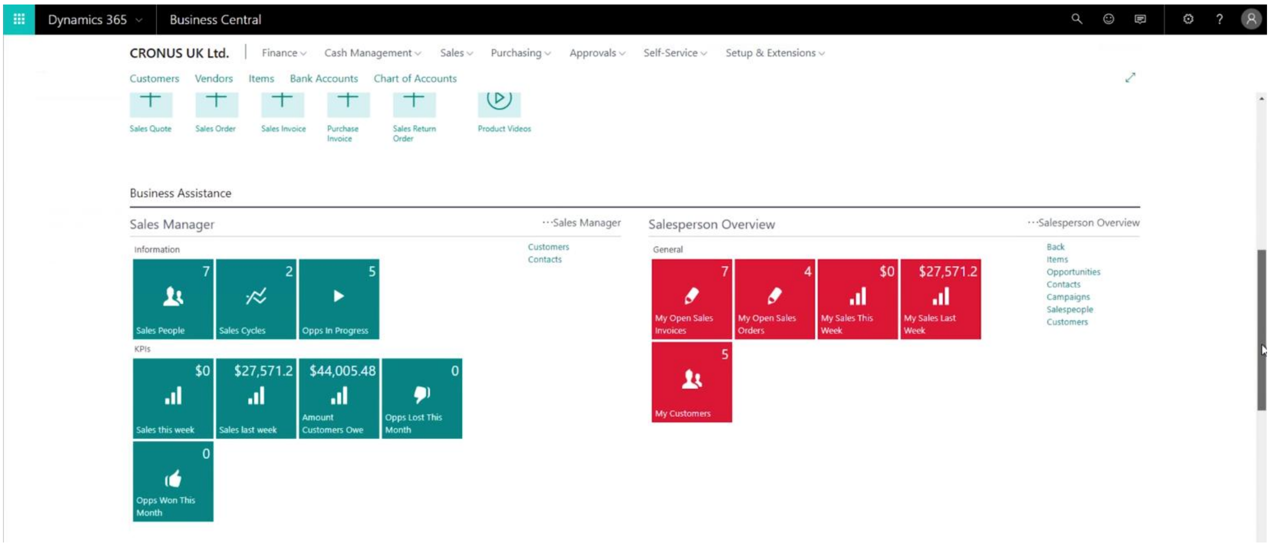
Contents

What is the purpose of this app?

Hello and welcome to nHanced 365. This app enables a user to customize their Microsoft Dynamics 365 Business Central system, create their own reports and customize their Role Centre. nHanced 365 consists of three pieces of functionality:

- nHanced 365 Panels and Tiles
- nHanced 365 Fields and Tables
- nHanced 365 Views

nHanced 365 Panels and Tiles



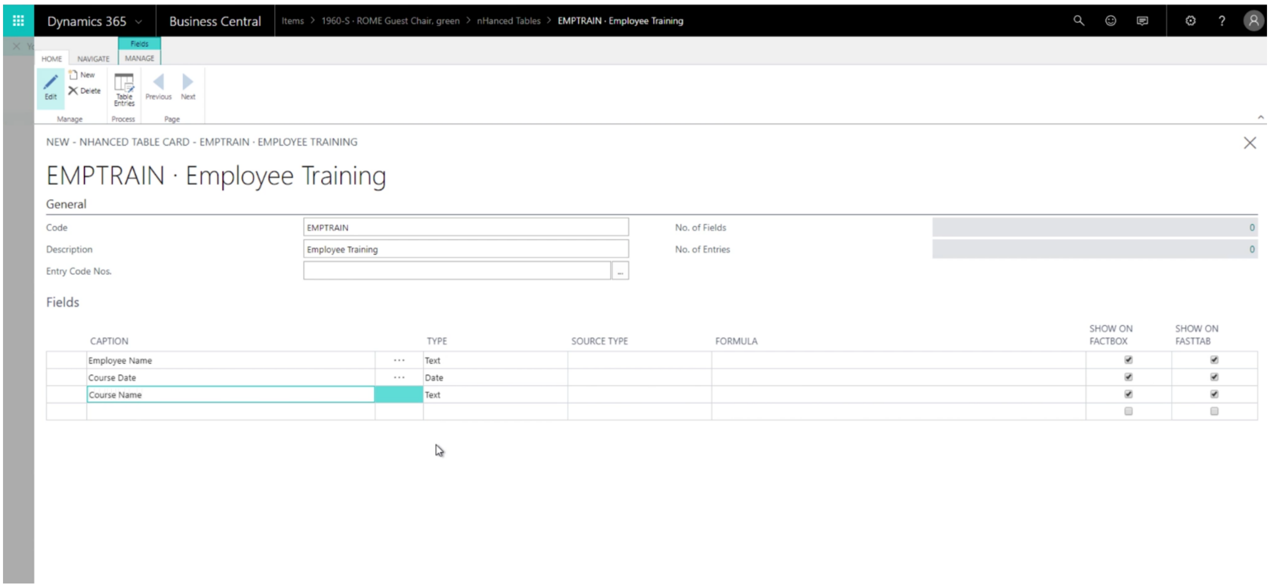
This app will give you full control of your Role Center and the Role Center of your users, enabling you to decide what is displayed depending on what is important to your day to day role.

This App allows users the ability to create Tiles and Links which users can create to display information that they need to see and to quickly take them to a page, to open a report, etc. These Tiles and Links are added inside Panels.

Panels are displayed on a Role Center, they can be shared between users, so for example people in the Finance department have the same panels but the Sales department have a different set of panels assigned to them. Otherwise a user can have a Panel assigned to just them.

This document will later guide you through how you can customize your own Role Center to ensure you and your users have the information needed to fulfil their tasks without having to navigate around the system.

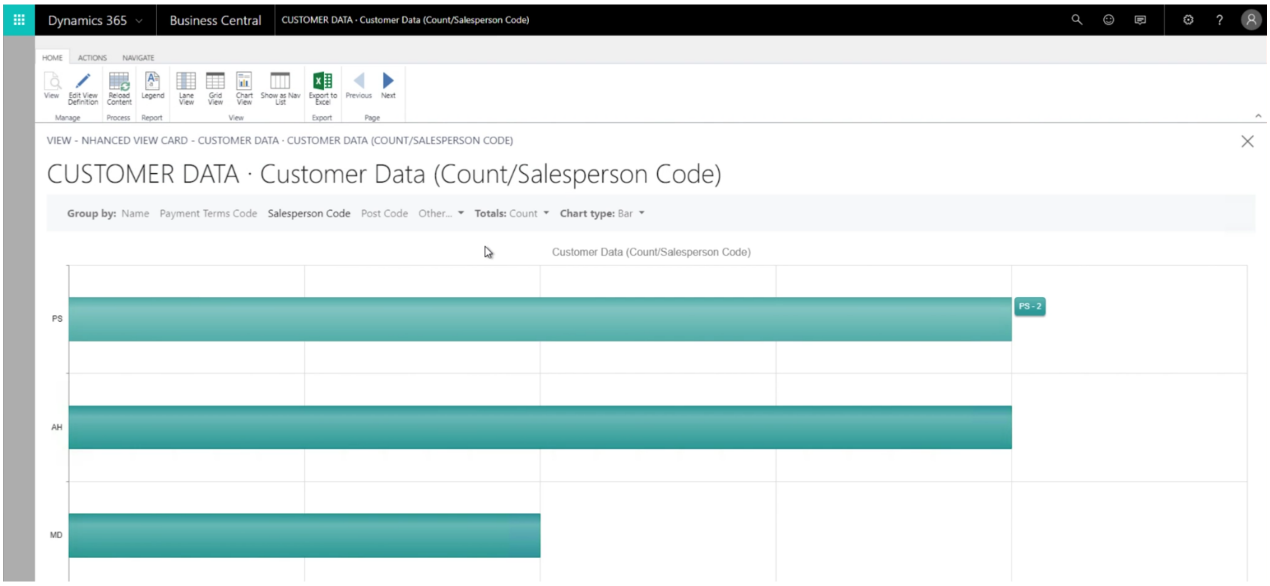
nHanced 365 Fields and Tables



nHanced 365 Tables and Fields allows a user to extend the data that Dynamics 365 Business Central can hold. This can be done through nHanced Tables and nHanced Fields. nHanced Fields are fields that are added to records in the system, for example if the user wanted to add a 'Season' field to the Item record, this can be added as an nHanced Field.

nHanced Tables are groupings of nHanced Fields which allow the user to store data about an entity that Dynamics 365 Business Central does not currently store, for example creating an nHanced Table called 'Employee Training' and then storing information such as the employee, the training course, the date, the status, etc.

nHanced 365 Views



nHanced 365 Views allow users to create their own reports and views so they can visualize their data in multiple ways. This purpose of this is to give users more insight into the meaning behind their data so better decisions can be made.

nHanced 365 Views contains two tools that can be used to create these visual representations of their data, Quick Reports and Views. As standard, the application has reports to users can run them to get data out of the system. However, there is no way for a user to be able to modify these reports or to be able to create their own. Quick Reports allows users to create their own reports very easily and with no level of technical expertise.

Views are another mechanism that is aimed towards end-users. These can be created so users can see their data in more ways than normally possible. Creating a View can create 4 views with no additional effort. They can display data grouped by a certain field, for example Customers grouped by Salesperson code (Lane View), in a sortable and group-able list (Grid View), in a chart that can be quickly changed (Chart View) and on a Map (Map View).

Setup and Configuration

Licensing the application

Upon installing nHanced 365, a 30-day evaluation license can be started to evaluate the functionality before purchasing. To view the license, follow the following steps:

1. Open Dynamics 365 Business Central.
2. **Press the search button** in the top right hand corner, **enter 'nHanced setup**' and **press the resulting page.**
3. **Press 'License Information'** button or link on the page.
4. You will then be able to view the individual modules in nHanced 365 and whether those modules are in evaluation mode or whether they have been purchased and are then enabled.

5. To update your details, press **Update Details** in the Ribbon and fill out the relevant information used to create your license.
6. To reload a license once any evaluation periods have started or when any modules have been purchased, press **Reload License.**

Setting up users

The only setup that is required is that 'nHanced Users' will need setting up for them to use nHanced 365 functionality.

1. Open Dynamics 365 Business Central and **press the search button** in the top right hand corner.
2. **Enter 'nHanced user setup'** and select the page.
3. The nHanced User Setup List will now open.
4. To add a user as an 'nHanced user', **press either 'Add User' or 'Add All Users'** from the Ribbon. You can either select a specific user to setup or if this is the first time doing this, add all users that have been setup in the system.
5. Select a user and **press Edit**.
6. You can link a nHanced User to other records in the system. For example, if you already have a Salesperson, Contact, etc. created for this user you can link the two. By linking the two, a user would then be able to create a tile based on smart filters in the system.
7. To link an nHanced User to a contact, **expand the Relationships FastTab.**
8. **Click on Contact** and **select the contact from the list.**
9. This can also be done for Salesperson, Employee, etc.
10. **Expand the Personalisation FastTab.**
11. Using the Personalisation section, a profile and panels can be assigned to the user from here.

Bing Maps Key

In order for nHanced 365 Views to display records on a map, a Bing Maps Key must be entered to communicate to that service and display the map. To enter a Bing Maps Key, follow these steps:

1. Open Dynamics 365 Business Central.
2. **Press the search button** in the top right hand corner, **enter 'nHanced setup**' and **press the resulting page.**
3. **Enter a Bing Maps Key** and **press X**.

Guides

nHanced 365 Panels and Tiles

How to create a Panel

There are a set of Panels that come out-of-the-box with nHanced 365 Panels and Tiles. For example, there are several Sales panels, Finance panels, etc. New Panels can be added to that users can add their own Tiles to them. To create a new Panel, follow these steps:

1. In the top right corner, press the search button.
2. **Type in 'panels'** and **select the page** displayed.
3. **Press New.**
4. Enter a **Code**.

This Code is used to uniquely identify the Panel so you can find it in other areas of the system, for example when you want to assign the Panel to your Role Center.

5. Enter a **Caption.** This is used to identify the Panel and will be displayed on the Role Center.

6. At **Default Tile Background,** press **Select Color.**
7. **Select a Color** from the Grid and press **Ok**.
8. **Press X** on the Panel Card.

Now we've created the Panel, the easiest way of adding Tiles and Links to it is to assign it to our Role Center.

How to assign a Panel to my Role Center

Once a Panel has been created, we can add it to our Role Center so that we can add Tiles and Links to it.

1. On the Role Center, **press Panel Selection** in the Ribbon.

This is the list of Panels that have been assigned to you, you can assign up to 10 Panels to a user which can then be made visible by moving them onto the Role Center.

2. Find an empty **Panel Code.**
3. **Press '…'** and select a Panel from the List or **type in the Panel Code** and press **X**.

Now we have assigned it to our user, it now must be moved onto the Role Center so it's visible.

4. On the Role Center, **press Personalize**.
5. Here you can see the Panels that are displayed on the left and right hand side of the Role Center. You can also see a list of Available Panels, those that have been assigned to you on the far left hand column. **Drag a Panel from 'Available'** to either the **Left Column** or **Right Column.**
6. **Press X** and then **press Ok**.
7. Press the icon in the top right and then press sign out and then sign back in again.
8. When the Role Center opens, the Panel should now be visible.

How to edit a Panel

A Panel has to be put into 'Design Mode' to customize it.

1. Once a Panel is displayed on a Role Center, it can be edited by **pressing the down arrow** next to the Panel description.
2. Press **Design Mode**.

The Panel should now have a purple banner highlighted it is now in Design Mode. This means that the Tile s and Links can now be edited by clicking on them, dragged to re-organise them and new Tiles and Links can be created using the actions.

How to add a Tile to a Panel

To add a Tile to a Panel, it first must be put into 'Design Mode'.

1. **Press the down arrow** next to the Panel description.
2. Press **Design Mode**.
3. Press **New Tile**.
4. In **Label**, insert the text (e.g. 'Customers') that will be displayed on the Tile.
5. Press **Tab.**

Looking at the **Tile Preview,** notice it will automatically refresh once a change is made to the Tile.

6. Click in **Value.**

Value is used to display something on the Tile, for example the amount of customers that have a balance, the amount of items in the system, etc.

7. Select a **Value Source Type.** This is used to define how the value on the Tile is calculated, for example whether it is used to total a value of a field (SUM), whether it displays the total amount of records (COUNT), etc. Select **Count.**
8. Next you must specify the Table being counted, type in **Customer** but a table can be selected from the list by pressing '**…**'
9. Press **Close.**
10. Press **Close.**

11. **Press** the Tile to open the Customer List.

Congratulations! You've just created a Tile displaying how many Customers you have in your system. Easy, right?

How to edit a Tile

Tiles can be edited to change the label, value, color, picture, etc.

1. To Edit a Tile, **put the Panel in 'Design Mode'.**
2. **Press** the Tile to Edit. *In this case Press our 'Customers' Tile.*
3. In the menu that opens, press **Edit Tile.**
4. To add an image, press **Select Image** in the Ribbon.
5. **Select an Image** and press **OK.**
6. To edit the value the Tile is calculating and displaying, click in **Value**.

We can apply a Filter to limit the records that are being retrieved, for example Customers that have a Balance.

7. On Filter Press **Click here to define Filter**.
8. Under Field, specify the field you want to filter the records on. To do this **press '…'** to select a field from a list or **type the name of the field in**. *For example **Type in Balance.***
9. In Value, type in **>0.** This means greater than 0.
10. **Press Close 3 Times.**

Going back to the Role Centre, the Tile will have an image on it and now displays the amount of customers that have a balance, very handy!

How to hide / Show a Tile

Tiles can be hidden and then shown again in a Panel.

1. **Put the Panel in 'Design Mode'**.
2. **Press** the Tile you want to Hide.
3. Select **Hide Tile.**

To show Tiles that have been hidden:

1. **Press the down arrow** on the Panel Description and press **Show/Hide Tiles.**
   a. **Alternatively, Put the Panel in 'Design Mode', Press a Tile** and then **press Show/Hide Tiles.**
2. Using the **Label** column, find the Tile you want to make visible in the List.
3. Press in the **Visible** field to tick it.
4. Press **Close.**

How to delete a Tile

If Tiles are no longer needed, they can be deleted from a Panel.

1. **Put the Panel in 'Design Mode'.**
2. **Press** the Tile to delete.
3. **Press Delete Tile.**

How to add a Smart Filter to a Tile

What's a Smart Filter?

A Smart Filter is a filter that is applied to a Tile. The value of the filter is then calculated automatically. For example, if you want to filter 'Customers that are assigned to your Salesperson Code', you can add a Smart Filter of 'MYSALESPERSONCODE' which will automatically translate this to the value of your Salesperson Code.

This also means that the Tile will be applicable to **everyone in the system** so if this was added to a Panel everyone could see, everyone then has a Tile showing them their customers, magic!

1. **Put the Panel in 'Design Mode'.**
2. **Press the Tile** to add the Filter (e.g. a Customers Tile).
3. **Press Edit Tile.**

4. **Press in the Value** field.
5. In the Filter field, press **Click here to edit Filter.**
6. **Enter the Field** you want to filter on, for example **Salesperson Code.**
7. In the Value field, press **'>'**

This now shows the entire list of Smart Filters that you can add to Tiles, you can add THISWEEK, MYCONTACT, THISMONTH, LASTMONTH, etc.

8. **Select MYSALESPERSONCODE.**
9. **Press Close twice**.
10. In Label, change the label from 'Customers' to '**My Customers**'.
11. **Press Close**.
12. **Press Stop Designing**.

How to change the color of a Tile

When a Tile is first created, it's color is taken from a default color setup on the Panel. If you want to change the color of the Tile, follow these steps:

1. **Put the Panel in 'Design Mode'.**
2. **Select the Tile.**
3. **Press Edit Tile.**
4. Under the **Background Color** section, press '**Click here to select color'.**
5. **Select a color** from the grid and press **Ok.**

You'll then notice the Background Color preview will have changed and so will have the color on the Tile Preview.

6. **Press Close.**
7. **Press Stop Designing.**

How to make the color of a Tile change dynamically

The color of a Tile can change depending on its value, for example, if there are 10 customers that have a balance, the color of the Tile could change to Red so the salesperson is prompted to take action.

1. **Put the Panel in 'Design Mode'.**
2. **Select the Tile.**
3. **Press Edit Tile.**
4. Under Background Color, change the **Background Color Type** to **Conditional**.
5. Then, press **Click here to edit dynamic background.**
6. In this section, define the value that you want to use to control when the color changes, for example it could be the same as the 'Value' of the Tile. ***For example Count, Customer where Salesperson Code = MYSALESPERSONCODE***.

Now we have defined what is used to determine why the Tile will change color, we need to specify when and what it will change to.

7. **Press Value Transformations** from the Ribbon.
8. In **Caption**, specify when you want the Tile to change color, for example '**>5**' for when you want the Tile to change when it's value is greater than 5.
9. In **Value**, enter the color you want to change it to, e.g. **RED.**
10. You can add multiple entries here to create a sequence or traffic light system of colors, for now, **press X**.
11. **Press close twice.**
12. **Press Stop Designing.**

How to add Tiles to a Tile Group.

Tile Groups allow you to group specific tiles together so they are displayed together in a Panel. A Panel can have multiple Tile Groups and these are then displayed vertically, so you will have Tile Group 'Orders' then Tile Group 'Invoices' found underneath it.

1. **Press the down arrow** on a Panel and go to **Panel Definition Card**.
2. **Press Tile Groups** in the Ribbon.
3. In Text, **enter the description** of your Tile Group, e.g. 'Orders', 'Invoices', 'Urgent', etc.
4. **Press X** once you have finished defining Tile Groups**.**
5. In the Tiles section, scroll until you find **Group Caption.**
6. For each Tile in the list, **select or type** in the Group that you want to assign it to.
7. **Press Close**.
8. Going back to the Role Centre, you should now see the Tile Groups have been created and the Tiles associated to them.

How to create a Link

What are Links?

Links are used to quickly navigate to a commonly used page, report, etc. Links are added to Panels and are then displayed on the right hand side. To add a Link:

1. **Put the Panel in 'Design Mode'.**
2. On the right hand side of the Panel, **press +New Link**
3. Enter the **Text** which is displayed on the Link. E.g. ***enter Customers***.
4. Next, decide what happens when the user presses the Link using **On Click**. Click in **Click in to define event.**
5. In **Action Type**, press **'…'**.
6. Select **Run Object**.

In Object Type, you can select the Type of Object you want the Link to run, in this case we will leave it to Page but both Tiles and Links can be used to run pages, reports, etc.

7. In **Object Name** press **'…'**. Select a page from the list, for example the Customer List.
8. **Press Close 3 times** to return to the Role Centre.

Once a Link has been added, it can be edited just like a Tile, a filter can be added to it, it can be hidden, deleted, etc. By following the similar steps around Tiles above.

How to assign a Panel to another users Role Centre

The Panel Selection page can be used to assign a Panel to a user. Follow these steps to assign a Panel to a user:

1. **Press the Search** button in the top right corner.
2. **Enter 'Panel Selections'** and press the result.
3. Under Home tab, **press Edit List**.
4. **Go to** the user in the list you want to assign a Panel to.
5. Enter the Panel you want to assign in any of the **Panel Code** fields for that user. You can either type in the Panel Code or **press '…'** to select it from the Panel List.
6. **Press X** to close the page.

If the user now presses **Personalize** on their Role Centre, they will now be able to see that Panel and move it to the left or right hand column of their Role Centre.

How to add a Tile to switch to another Panel.

1. Put the Panel in '**Design Mode'**.
2. Press **'New Tile'.**

3. **Enter a Label** to display on the Tile.
4. Click **'Click here to edit event'** at On Click.
5. At Action Type**, press '…'.**
6. **Select 'Switch Panels'.**
7. **Press '…'** on Panel Code and select the Panel to open when the Tile is clicked.
8. **Press Close twice** and then press **Stop Designing**.

nHanced 365 Fields and Tables

How to add an nHanced Field

1. **Press the search button** in the top right e.g. 'Item List' to go to the List Page you want to add an nHanced Field too.
2. On the right hand side, notice the **nHanced Information FactBox**.
3. **Press nHanced Fields** and then **press New**.
4. **Enter the Name**, e.g. 'Season'.
   At this point, the Value FastTab could be expanded to specify the Data Type for this nHanced Field, for example whether it's text, decimal, date, etc. However, Text is the default so this is not changed in this scenario.
5. **Press X** to close the page**.**
6. **Press Reload** on the Fact Box**.**
   Now you should notice that the Season nHanced Field has been added to the FactBox.
7. **Press Edit Values** on the Fact Box.
8. **Select the Value** field for Season and enter 'Christmas' and **press X**.
9. **Press Reload** on the Fact Box**.**
   You should now notice that the record you have selected in the Item List now has a Season of 'Christmas', you can select another record in the list and enter the Season as above.

How to add an nHanced Field allow users to select a value from a list

1. **Go to a List**, for example an Item List.
2. On the right hand side, notice the **nHanced Information FactBox.**
3. **Press nHanced Fields** and then **press New.**
4. **Enter the Name**, e.g. 'Season'.
5. Under Source Type, select **'Pick Value from User Defined List'**.
6. Press '**Click here to edit list of field values'.**
7. **Press '+new'**.
8. Enter a Code for the value, e.g. 'SUMMER'. This will default the description.
9. Enter some more values, in this case seasons and then **press X.**
10. On the nHanced Information FactBox, press **Edit Values**.
11. Go to the **Value** for **Season** and press **'…'.**
12. Select a value from the List and press **OK**.

How to add an nHanced Field calculating other values

1. **Go to a List**, for example an Item List.
2. On the right hand side, notice the **nHanced Information FactBox**.
3. Press **nHanced Fields** and then **press New**.
4. **Enter the Name**, e.g. 'Inventory Value'.
5. Under **Source Type** select **Formula**.

6. **Expand the Formula** FastTab.
   Using Formula you can press '…' to select the fields you want to calculate otherwise you can type them in including ' '.
7. **Enter the Formula,** in this case **'Inventory'*'UnitPrice'.** This example would multiply the inventory by the unit price per item.
8. **Press X**.
9. **Press Reload** and notice the field has been added**.**

How to add an nHanced Field using a value from another table

An nHanced Field can be used to retrieve a value from another table, for example we could create an nHanced Field called 'Vendor Name' which takes the Name from the Vendor table and displays it against the Item.

1. **Go to a List**, for example an Item List.
2. On the right hand side, notice the **nHanced Information FactBox.**
3. Press **nHanced Fields** and then **press New.**
4. **Enter the Name,** e.g. 'Supplier Name'.
5. Under **Source Type,** select '**Pick Values from Table Field'**.
6. **Expand** the **Select from another table** FastTab.
7. Under Table Name, specify the table you want to take a value from. In this case enter **Vendor press '…'** to select it from the list.
8. Under Field Name, specify the field you want to take a value from. In this case enter **Name** or **press '…'** to select it from the list.
9. Under Filter, click **Click here to edit filter.**
10. Under Field, specify the field from the Vendor Table, in this case **'No.'.**
11. Under Filter Source, press the arrow and **select Field.**
12. Under Value, press '…' and select the field from the Item table needed to link the Vendor table. In this case, the **'Vendor No.'**
13. **Press X**.
14. **Press Reload** on the nHanced Information FactBox, the field will now be displayed in the FactBox.
15. **Press Edit Values.**
16. Select Vendor Name and then press '…' on Value. This will then let you select a value from the Vendor List, e.g. selecting the **Vendor Name**.

How to add an nHanced Field totalling a value from a field.

Creating an nHanced Field with a Source Type of 'Totalling' allows you to have an nHanced Field that will automatically calculate a value based on a condition. This can be used in multiple ways, you can use it to return the 'Vendor Name' from the Vendor table against an Item, you can use it to return the 'Total Sales This Week' for an Item when that Item has been added to a Sales Document this week, etc.

Returning the first value

1. **Go to a List**, for example an Item List.
2. On the right hand side, notice the **nHanced Information FactBox.**
3. Press **nHanced Fields** and then **press New.**
4. **Enter the Name,** e.g. 'Vendor Name'.
5. Under **Source Type,** select '**Totalling'**.
6. **Expand** the **Totalling** FastTab.
7. Under **Value Source Type**, select **'FIRST'.** In this example we will use the nHanced Field to return the first Vendor Name it finds based on the Vendor No.

8. Under Table Name, specify the table you want to take a value from. In this case enter **Vendor press '…'** to select it from the list.
9. Under Field Name, specify the field you want to take a value from. In this case enter **Name** or **press '…'** to select it from the list.
10. Under Filter, click **Click here to edit filter.**
11. Under Field, specify the field from the Vendor Table, in this case **'No.'.**
12. Under Filter Source, press the arrow and **select Field.**
13. Under Value, press '…' and select the field from the Item table needed to link the Vendor table. In this case, the **'Vendor No.'**
14. **Press X**.
15. **Press Reload** on the nHanced Information FactBox.
16. You should now notice that the nHanced Field has been added against the Item and whenever the Item has a 'Vendor No.' it should automatically have the Vendor Name against it.

Returning a totals value

In this example we will create a 'Sales this week' nHanced Field against the Item to quickly identify how many tiles this Item has been sold this week.

1. **Go to a List**, for example an Item List.
2. On the right hand side, notice the **nHanced Information FactBox.**
3. Press **nHanced Fields** and then **press New.**
4. **Enter the Name,** e.g. 'Sales this week'.
5. Under **Source Type,** select **'Totalling'**.
6. **Expand** the **Totalling** FastTab.
7. Under Value Source Type, select **'COUNT'.** *We could use SUM to return the total amount of product we have sold this week but COUNT will identify how many times we have sold it.*
8. Under Table Name, enter **Sales Line.**
9. Under Filter, click **Click here to edit filter.**
10. **Under Field, enter 'No.',** then change the **Filter Source to 'Field'** and then enter the Value which in this case is the field in the Item table we are linking the Sales Line table to, **so enter 'No.'**.
11. To only get Sales Lines for this week, in the next row down enter **'Posting Date'** in the Field.
12. In Filter Source, **select Filter**. **Then press > to select a Smart Filter**.
13. **Select THISWEEK** from the list.
14. **Press Close** and then **X twice.**
15. **Press Reload** on the nHanced Information FactBox.
16. You should now notice the nHanced Field has been added and it will return the total amount of times this item has appeared in a sales document this week.

How to enter a value into an nHanced Field

1. **Go to a List,** for example an Item List.
2. On the right hand side, notice the nHanced Information FactBox.
3. **Press Edit Values** on the Fact Box.
4. **Select the Value** field for Season and enter 'Christmas' and **press X**.
5. **Press Reload** on the Fact Box**.**

   You should now notice that the record you have selected in the Item List now has a Season of 'Christmas', you can select another record in the list and enter the Season as above.

How to edit an nHanced Field

1. **Go to a List,** for example an Item List.

2. On the right hand side, notice the nHanced Information FactBox.
3. Press **Setup Fields**.
4. Select the nHanced Field to edit and then press Edit in the Ribbon.

How to delete an nHanced Field

1. **Go to a List,** for example an Item List.
2. On the right hand side, notice the nHanced Information FactBox.
3. Press **Setup Fields**.
4. Select the nHanced Field to delete. You can then either **press '…' and press Delete Line** or you can select the nHanced Field from the list and **press Delete** in the Ribbon.

How to show/hide an nHanced Field

1. **Go to a List,** for example an Item List.
2. On the right hand side, notice the nHanced Information FactBox.
3. Press **Show/Hide Fields** on the nHanced Information FactBox.
4. If you want to hide an nHanced Field unselect **'Visible',** otherwise press '**Visible'** to make it Visible so it will appear in the nHanced Information FactBox.

How to create an nHanced Table

1. **Press the search button** in the top right corner and **enter nHanced Table**.
2. In the top left, press **New**.
3. Give your nHanced Table a code and a description so it can be easily found later, such as '**EMPTRAIN'** and '**Employee Training'.**
4. Now, in the Fields section we can add nHanced Fields to the table.
5. If these fields are standard Text fields to enable a user to type a value into them, leave the **Type as Text** and create a few fields in the nHanced Table. For example, **Employee, Training Course, Status**.
6. Using the nHanced Fields steps above, nHanced Fields can be created to select a value from another table. Also, the Status field could be changed to a Pick value from User Defined List, etc.
7. To enter data into this table, press **Table Entries.**
8. Now data can be entered into the table, for example 'Bob Smith', 'Intro to nHanced Tables', 'Completed'.

How to enter records into an nHanced Table

1. **Press the search button** in the top right corner and enter **nHanced Table.**
2. Select the **nHanced Table** from the list.
3. To enter data into this table, press **Table Entries.**
4. Now data can be entered into the table, for example 'Alice Hart', 'Managing nHanced Tables', 'Completed'.

nHanced 365 Views

Creating a Quick Report

A Quick Report can be created against any record in the system, for example it can be created against an Item, Vendor, Customer, Purchase Header, etc. To create a Quick Report, follow these steps:

1. Press the **'Items'** button in the Navigation Pane or **press the search button** in the top right corner and **enter 'Items'** and open the List.
2. Notice the nHanced Information FactBox on the right hand side of the page.

3. **Press Quick Reports.**
4. **Press New.**
5. Notice the Table Name has already been populated. This can always be changed if the Quick Report is for another table.
6. To add fields to the Quick Report, press **Add Multiple Fields** in the ribbon.
7. **Press '…'** and then **Select More**.
8. Using the tick box, **select** some fields to add to the Quick Report and **press OK**.
9. Notice the fields have been added to the Fields section. More can always be added by using the same button or by entering the fields directly in that section of the page.
10. To run the Quick Report, press **Show Report**.
11. The Quick Report will then be displayed, the records can be sorted, grouped, exported, etc.
12. **Press X** to close the page.
13. To save the Quick Report, press **Save As**.
14. Giving this Quick Report a Code and Name will make it easier to find later on in the application.
15. Define whether the Quick Report is 'My Report' or not. If it is ticked, then only you will be able to see it, otherwise everyone will be able to use it.

Editing a Quick Report

1. **Navigate to the Quick Report list**. This can be done by going to a page (e.g. the Item List) and going to the Quick Reports section of the nHanced Information FactBox and **press List**. Otherwise press the search button in the top right corner and **entering 'Quick Reports'.**
2. Select the Quick Report to edit and press **Edit** from the Ribbon.
3. Now the Quick Report is in edit mode, fields can be added, etc.

Running a Quick Report

1. **Navigate to the Quick Report** to run. This can be done by going to a page (e.g. the Item List) and going to the Quick Reports section of the nHanced Information FactBox. Otherwise press the search button in the top right corner and **entering 'Quick Reports'.**
2. If using the nHanced Information FactBox, **press the Quick Report** to run.
3. If using the Quick Report list, **select the Quick Report** to run and then **press Show Report**.

Grouping a Quick Report

Once a Quick Report has been opened so the data is displayed, the user can select a field to use to group the records. For example, if the Quick Report displayed Items, the user could group them by their Vendor No., Inventory Posting Group, Base Unit of Measure, etc.

1. **Run a Quick Report**.
2. From the Ribbon, press **Group By.**
3. Select a field to group the results by using the **Selected** tick box and **press OK**.
4. The data will then be grouped, to view the data in a particular group, press **Show Group Details**.
5. This then displays the data. Selecting a record and pressing **Show Card** can be used to open the corresponding page for this record, for example opening the Item Card.
6. Press **Hide Group Details**.
7. Press **UnGroup**.
8. **Press Group By** and then **select more than two fields** and **press OK**.
9. Here you can see that a Quick Report can group data by multiple fields.

Exporting data from a Quick Report

1. **Run a Quick Report**.

2. From the Ribbon, press **Actions**.
3. In the Actions ribbon you can see all of the different buttons available for exporting the data. The data can be exported as XML, Excel, PDF, CSV, etc.

Running a Quick Report as an nHanced View

A Quick Report can be displayed as an nHanced View in two different ways:

1. **Navigate to the Quick Report** to run. This can be done by going to a page (e.g. the Item List) and going to the Quick Reports section of the nHanced Information FactBox. Otherwise press the search button in the top right corner and **entering 'Quick Reports'.**
2. Select the Quick Report from the List and press **Show nHanced View.**

1. **Open a page**, e.g. the Item List and go to the **nHanced Information FactBox**.
2. Run a Quick Report by selecting one under **Quick Reports.**
3. Press **Show nHanced View**.

Adding an nHanced Field to a Quick Report

nHanced Fields can be added to a record to extend the data that the application can hold. For example, if a user wanted to add a 'Season' field to the Item then this can be added as an nHanced Field. This can then be added to a Quick Report, by following these steps:

1. **Navigate to the Quick Report list**. This can be done by going to a page (e.g. the Item List) and going to the Quick Reports section of the nHanced Information FactBox and **press List**. Otherwise press the search button in the top right corner and **entering 'Quick Reports'.**
2. Select the Quick Report to edit and press **Edit** from the Ribbon.
3. In the Fields section, go to a new line and in Field Name press **'…'**
4. If you know the name of your nHanced Field you can search for it at the top, otherwise press the **Field Type** column.
5. The nHanced Fields will then be displayed. **Select the nHanced Fields to add to the Quick Report** and press **OK**.

Making a Quick Report public

When a Quick Report is saved, it can be made Private or Public. When it is private it means that only the user that created it can access it, when it is public everyone can access it. To make a Quick Report public, follow these steps:

1. **Navigate to the Quick Report list**. This can be done by going to a page (e.g. the Item List) and going to the Quick Reports section of the nHanced Information FactBox and **press List**. Otherwise press the search button in the top right corner and **entering 'Quick Reports'.**
2. **Select the Quick Report** from the list.
3. In the Ribbon, press **Make Public.**

Creating an nHanced View

1. Navigate to a page, for example the Customer List by **searching for Customers**.
2. Notice the nHanced Information FactBox on the right hand side.
3. **Press nHanced Views**.
4. **Press New.**
   This will take the fields that are on the page that is open and it will insert them into an nHanced View and create it automatically for the user.

5. Now the nHanced View has opened, the user will be able to view the records on the Grid, Lane, Chart and Map.
6. **In the Grid View,** a user can click a column to sort the results by that column. Also, is a column is dragged and dropped **into the top section**, this will group the results by that field.
7. The View can be changed by using the **Lane View, Grid View, Chart View and Map View** button in the Ribbon.
8. Press **Lane View.**
9. Lane View will display all of the records in groups, you can select any field in the nHanced View to be used to group the records. For example, you can **press Location Code** to group the customers by their Location Code.
10. Next to each 'Lane', a **Totals is displayed.** Using the Totals field, this can be changed from Count to anything else on the nHanced View.
11. In a Lane View, a record can be modified (if the user has permission) by selecting a record and dragging it from one lane and dropping it onto another one. This can be used to update the location code, salesperson code, etc.
12. Press **Chart View**.
13. This will display the records on a chart. The type of chart can be changed by selecting **Chart Type** and selecting another one, for example **Pie**.
14. On a Chart View you can also change the values that are used on the axis. For example, using the **Group By,** you can change this to another field and the chart will re-adjust.
15. Using the **Totals** field**,** this can also be changed and the chart will re-adjust.
16. Press **Map View**.
17. If the record has a Post Code or an nHanced Field for Co-Ordinates has been added, Map View will be available for users to use. This will then show the records on a Map so the user can zoom out, hover over a pointer on the map to identify what the record is.
18. **Press X** to close the nHanced View.
19. **Press Back (<) or Reload** on the nHanced Information FactBox. The newly created nHanced View will be there and it will be saved using the name of the page you are on.

Running an nHanced View

1. Navigate to a page, for example the Customer List by **searching for Customers**.
2. Notice the nHanced Information FactBox on the right hand side.
3. **Press nHanced Views**.
4. **Press the nHanced View** to run.

Editing an nHanced View

If an nHanced View has been created automatically or manually, they can be edited so fields or nHanced Fields can be edited, styles can be edited, etc.

1. Navigate to a page, for example the Customer List by **searching for Customers**.
2. Notice the nHanced Information FactBox on the right hand side.
3. **Press nHanced Views**.
4. **Press Settings**.
5. **Select the nHanced View** from the List and **press Edit**.
6. To change the description of the nHanced View, which is made visible in the List and FactBox, **enter Description** and enter a new one.
7. In **View Mode**, this specifies which View is opened first when the nHanced View is ran. This can be changed to Grid, Map, Chart or Lane.

8. In **Show on Role Centre**, this is used to define whether the nHanced View can be made visible directly on a user's Role Centre.
   When the nHanced View opens as a Lane and Chart, it is automatically grouped by a field and each group will then display a 'totals', this total will be shown at the top of each group.
9. To change the field used as the default group, go to **Group By Field**, **press '…'** and select a field from the list.
10. To change the field used as the default totals, go to **Totals Field**, **press '…'** and select a field from the list.
11. To add more fields to the nHanced View, go to the **Available Fields** section.
12. Fields and nHanced Fields can be added to the nHanced View, select the **Field Type**, **whether it is Field or nHanced Field**.
13. In Field Caption, type in the name of the field or **press '…'** to select the field from the list.
14. Select whether this field is **'Moveable'**. If it is then the user will be able to drag a record from one Lane to another Lane when grouped by this field.
15. Select whether this field is set to **'Show All Values'.** If ticked, this will create a group for every possible value for that field. For example, if the salesperson JR didn't have any customers assigned to them, an empty Lane will be displayed in the Lane View so a user could then drag and drop a record between these lanes.
16. Select whether this field is set to **'Fast Select'**, if ticked, the field will be displayed above the nHanced View when it is running, under the 'Group By' section. If not ticked, the user can access it using **'Other'**.
17. Once all changes have been made to the nHanced View, **press X**.
18. Back in the **nHanced Views** area of the **nHanced Information FactBox,** press the nHanced View from the list to run it.