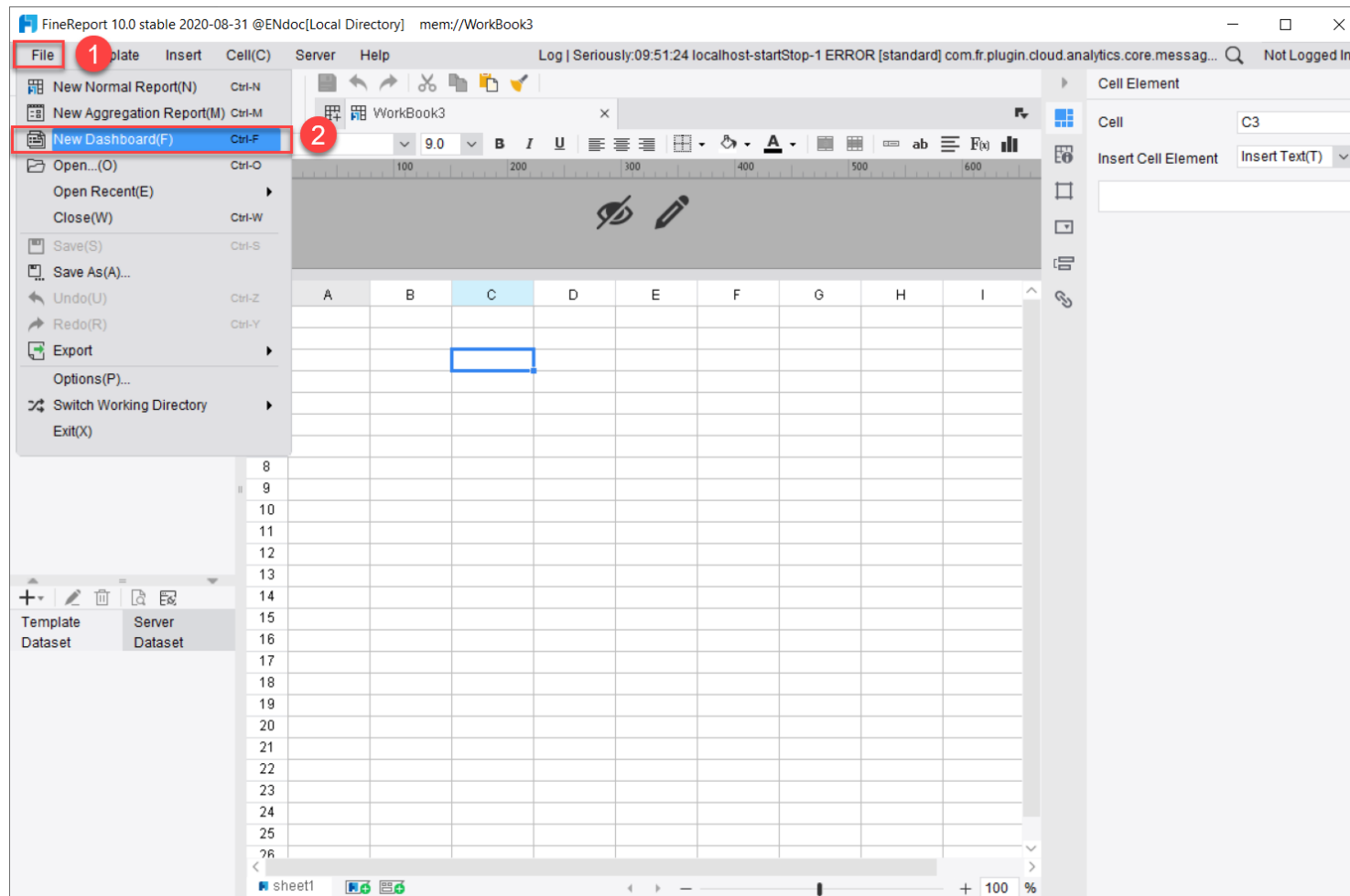


# I. Template Preparation

To start, we have to create a new template and prepare the data to use.

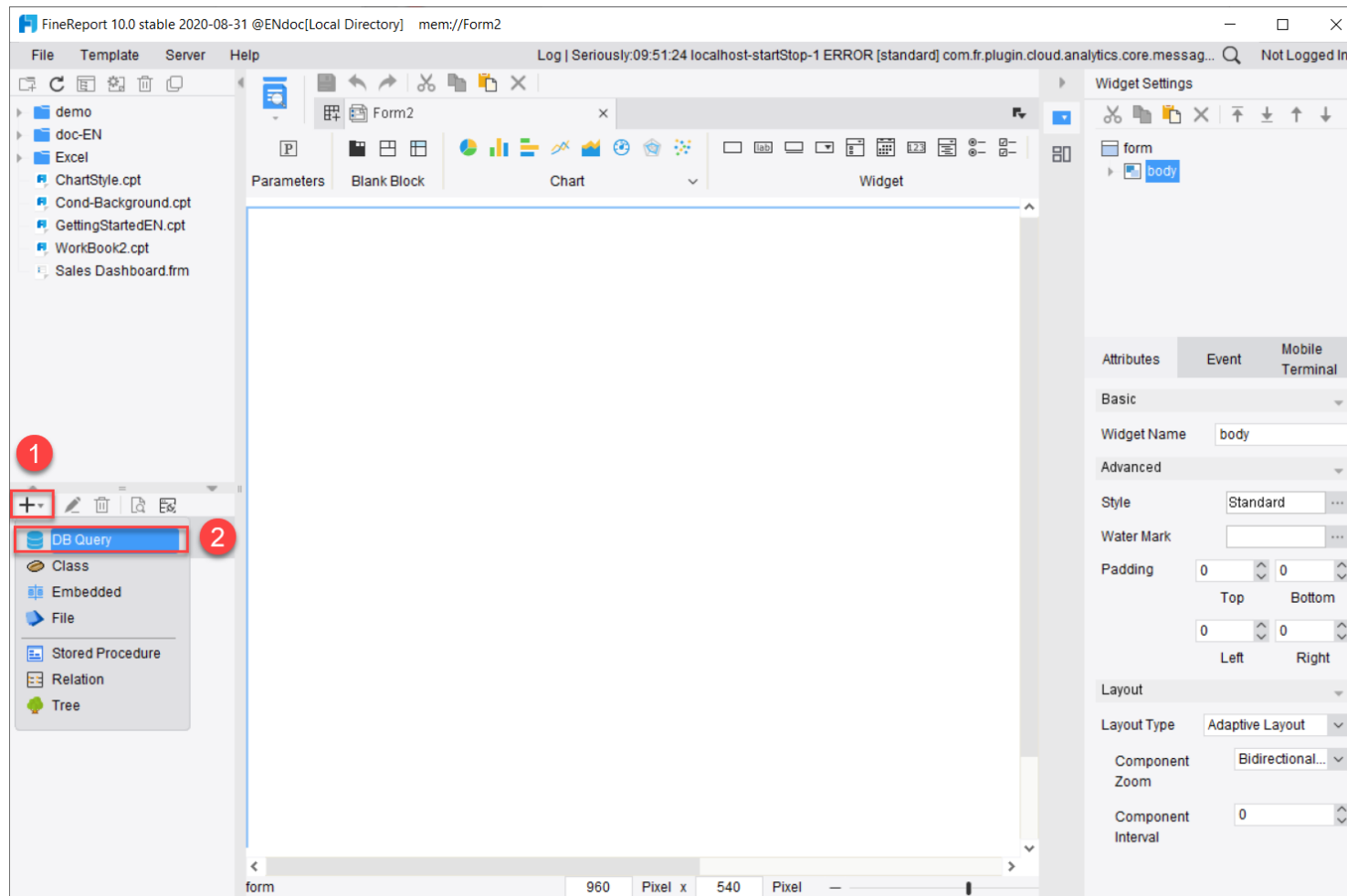
## 1. Create a New Dashboard

- Move to the toolbar manu at the top of the designer.
- Click **[File]>[New dashboard]**. A new dashboard will pop up.

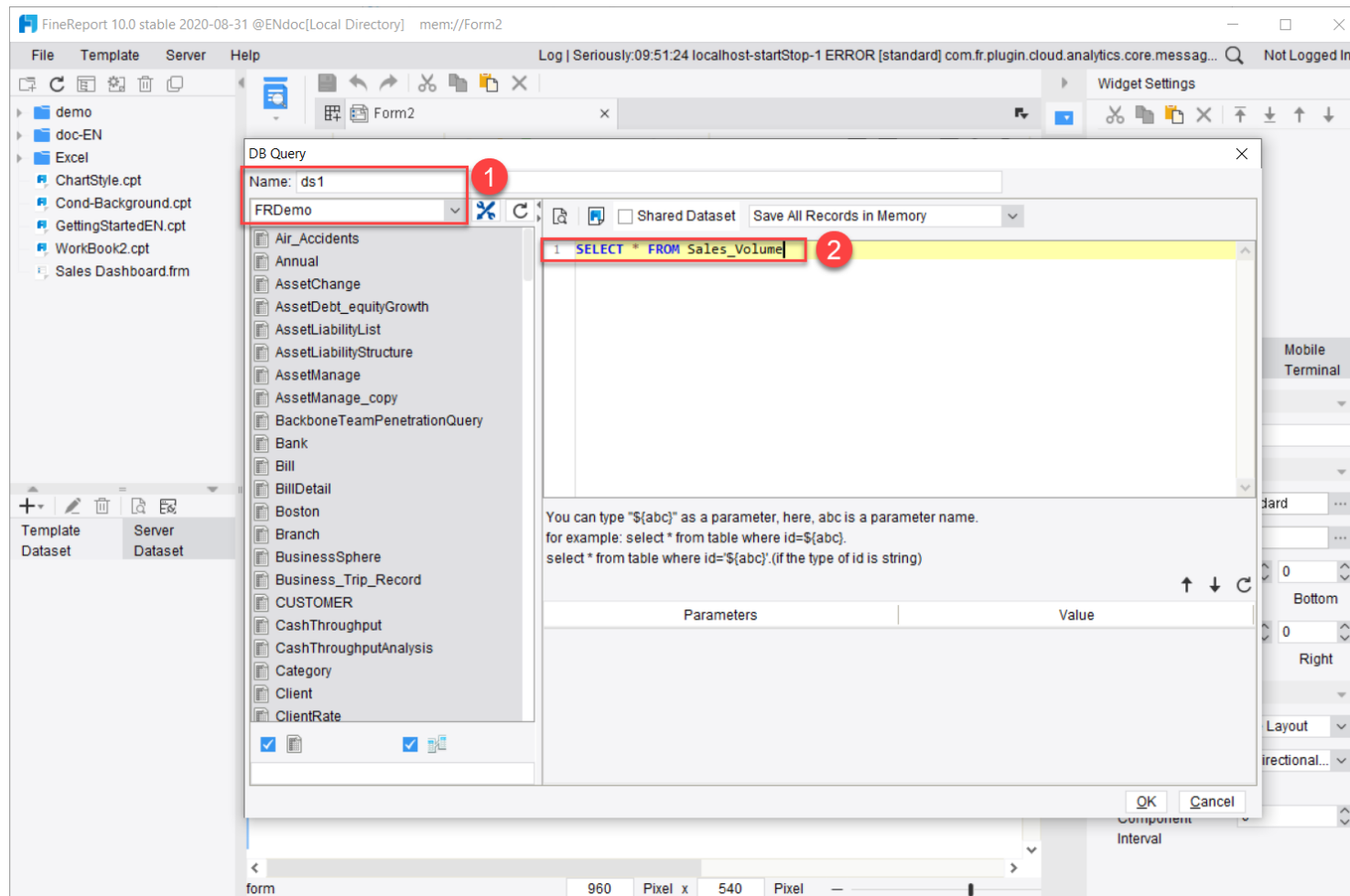


## 2. Data Preparation

- Look at the dataset section at the bottom left, it's now using template dataset.
- Click **[+]>[DB query]**.



- Here we are using FRDemo database that comes with FineReport. Use SQL statements ***SELECT \* FROM Sales\_Volume*** to query the sales volume data from the database.



- Click  to view the data we selected.

FineReport 10.0 stable 2020-08-31 @ENDoc[Local Directory] mem://Form2

File Template Server Help Log | Seriously:10:02:31 AWT-EventQueue-0 ERROR [standard] Not Logged In

Widget Settings

DB Query

Name: ds1

FRDemo

1

2

Preview

Data

Current Number of Preview Rows: 94 Maximum Number of Preview Rows: 200

1. Region(...	2. Salesper...	3. Product_...	4. Product(...	5. Sales_V...
East China	Sun Lin	Beverages	Apple Juice	140
East China	Jin Shipeng	Beverages	Apple Juice	290
East China	Zhang Shan	Beverages	Apple Juice	300
East China	Sun Yang	Beverages	Apple Juice	120
East China	Yuan Chen...	Beverages	Apple Juice	220
North China	Zhang Ying	Beverages	Apple Juice	250
North China	Wang Wei	Beverages	Apple Juice	180
North China	Zhang Wu	Beverages	Apple Juice	233
North China	Han Wen	Beverages	Apple Juice	123
East China	Sun Lin	Beverages	Milk	431
East China	Jin Shipeng	Beverages	Milk	635
East China	Zhang Shan	Beverages	Milk	324
East China	Sun Yang	Beverages	Milk	644
East China	Yuan Chen...	Beverages	Milk	343
North China	Zhang Ying	Beverages	Milk	234
North China	Wang Wei	Beverages	Milk	666
North China	Zhang Wu	Beverages	Milk	700
North China	Han Wen	Beverages	Milk	111
East China	Sun Lin	Beverages	Orange Jui...	176
East China	Jin Shipeng	Beverages	Orange Jui...	500
East China	Zhang Shan	Beverages	Orange Jui...	340
East China	Sun Yang	Beverages	Orange Jui...	540
East China	Yuan Chen...	Beverages	Orange Jui...	563

OK Cancel

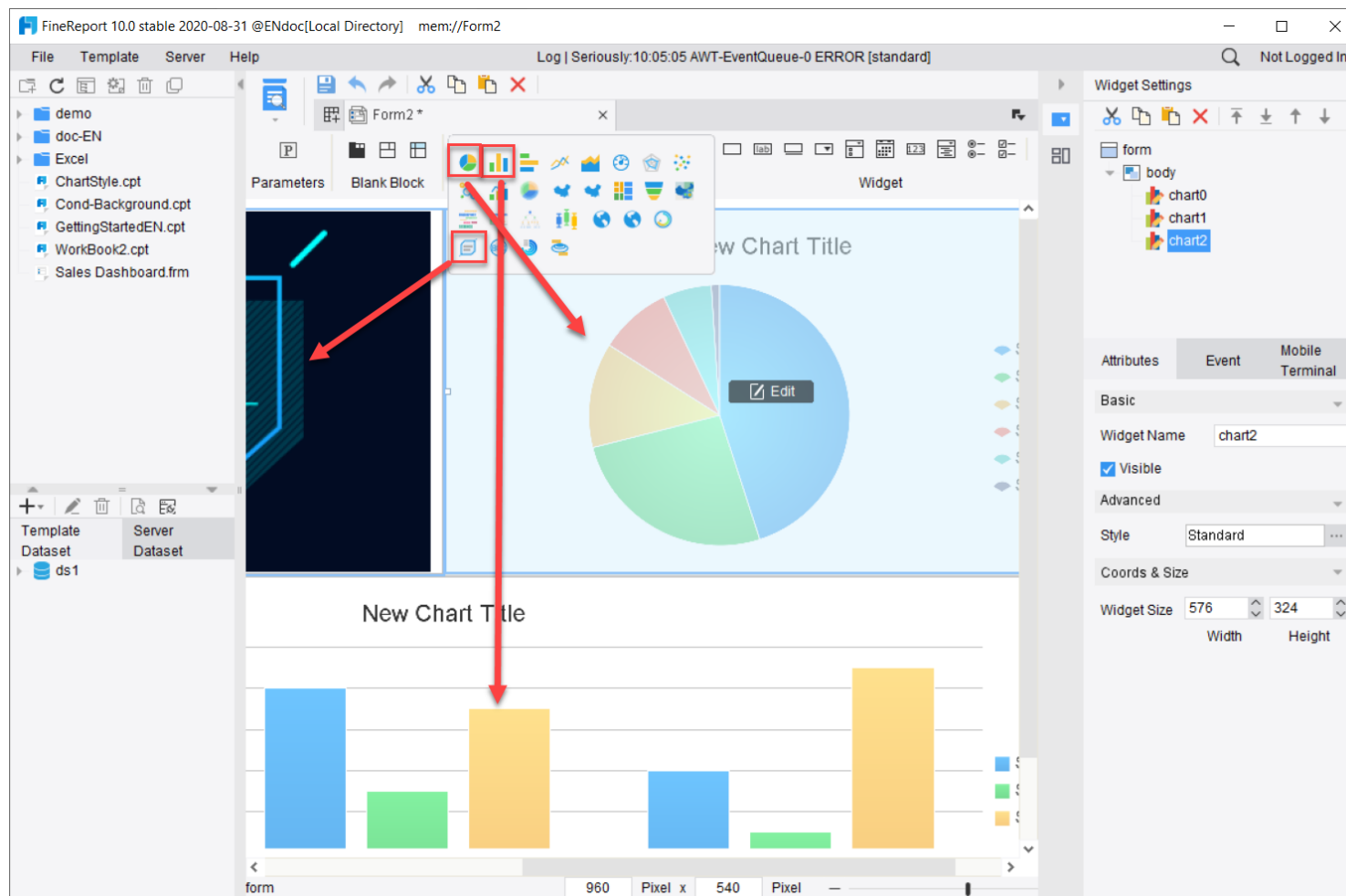
Interval

form 960 Pixel x 540 Pixel

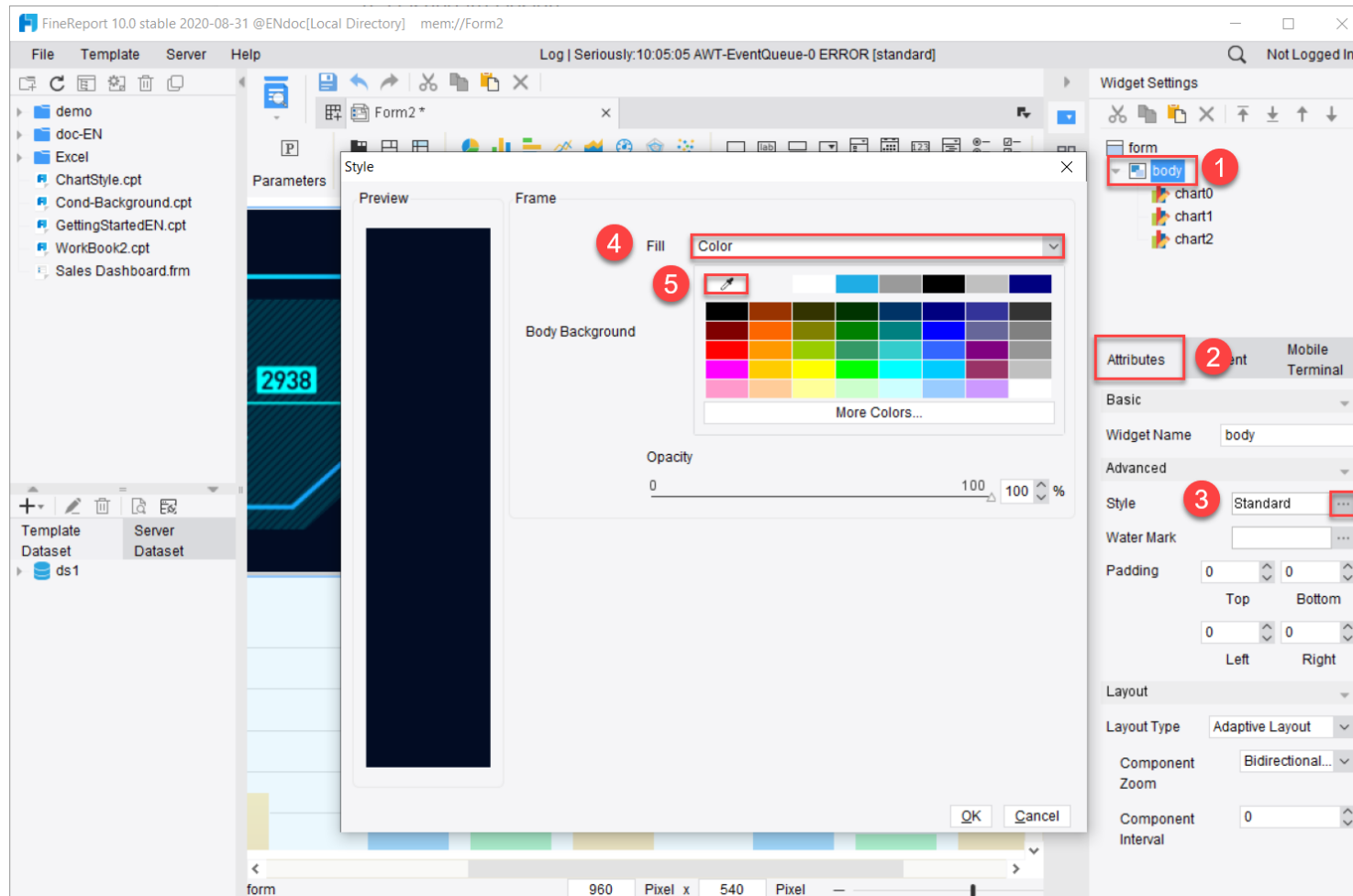
## II. Dashboard Design

The new dashboard is a blank canvas. Report design elements, such as charts, widgets, etc., are displayed on the top.

- Let's drag in the column chart, pie chart and KPI indicator that we need. Adjust them to the appropriate size.



- We want to set the report background to the same color as the KPI indicator, click [body], move to [Attributes]>[Advanced]>[Style], set fill as [color] and select the color (dark blue) we want.



### III. Chart Design

Next let's set up the three charts one by one.

#### 1. Column Chart: Personal Sales on Different Product Types

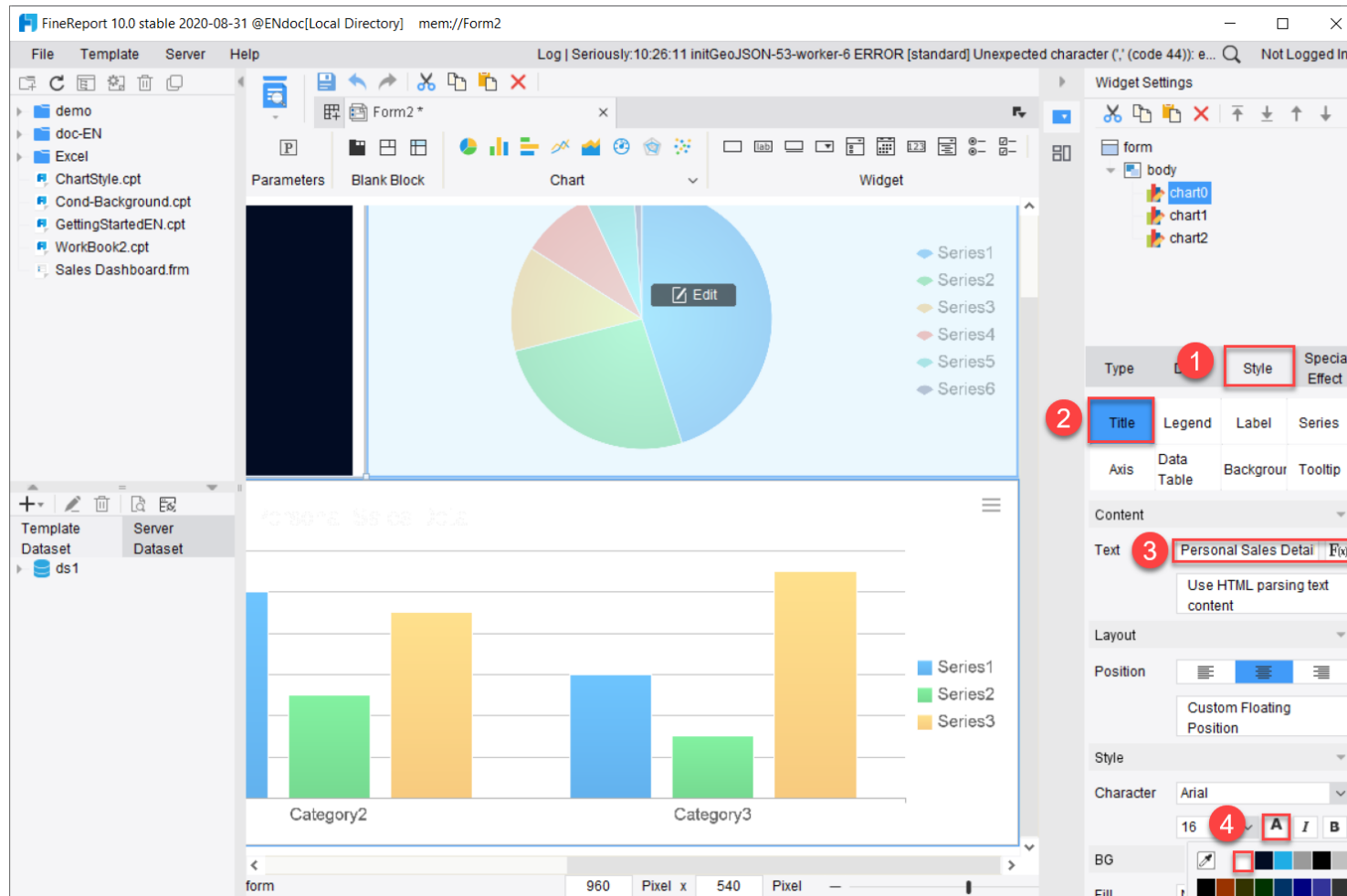
- Double click on column chart.
- To bind the data, please go to [Data] tab on the right. Settings are as follow:

The screenshot displays the FineReport 10.0 software interface. The main workspace shows a column chart titled 'New Chart Title' with three series: Series1 (blue), Series2 (green), and Series3 (yellow). The x-axis has two categories: 'Category2' and 'Category3'. The y-axis represents sales volume. To the right, the 'Widget Settings' panel is open, with the 'Data' tab selected. The settings are as follows:

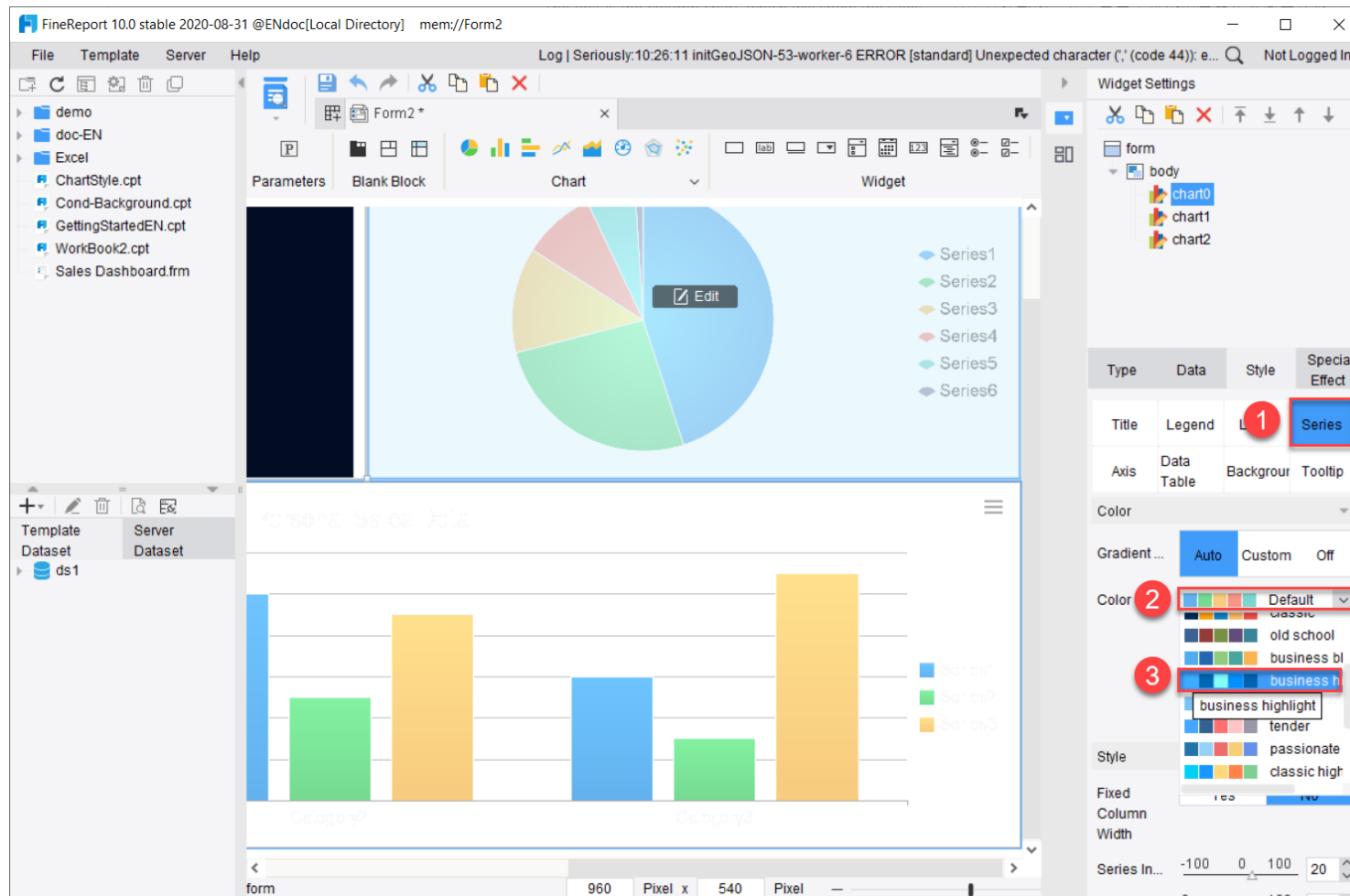
Property	Value
Data Source	Dataset Data
Dataset	ds1
Category	Salesperson
Series Name	Field Value
Series	Product_types
Value	Sales_Volume
Summary Met...	Sum

Below the chart, the status bar shows the form dimensions: 960 Pixel x 540 Pixel.

- Go to [Style] tab, and click [Title]. Enter the title text [Personal Sales Detail], and set the color to white to look good on the dark blue background.



- Also set the text in [Legend] and [Axis]>[x axis]&[y axis] to white color.
- Go to [Series] tab, and change the chart series style to [Business Highlight]



## 2. Pie Chart: Sales Percentage of Different Product

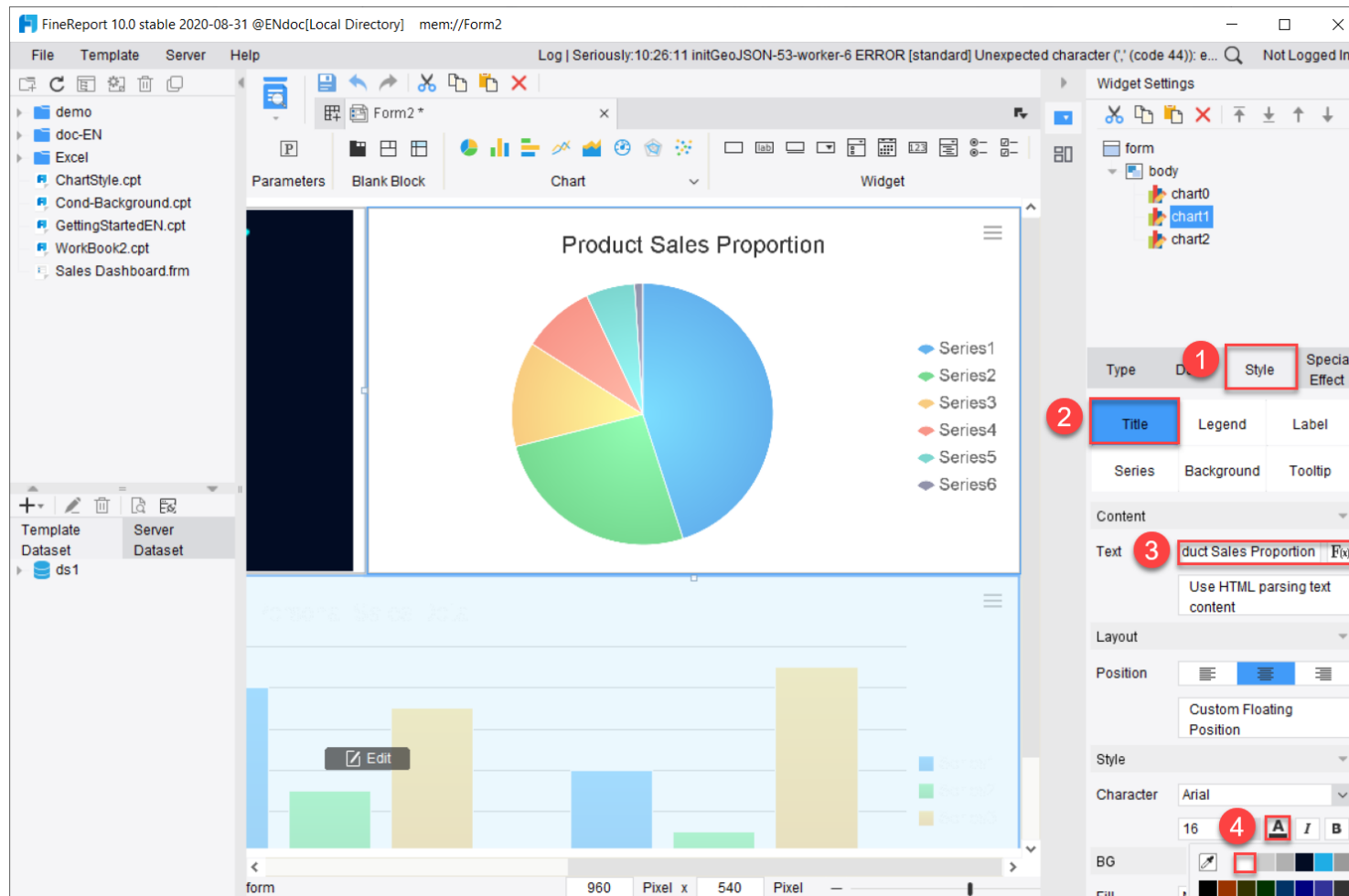
- Double click on pie chart.
- To bind the data, please go to [Data] tab on the right. Settings are as follow:

The screenshot displays the FineReport 10.0 software interface. The main workspace shows a pie chart titled "New Chart Title" with six data series: Series1 (blue), Series2 (green), Series3 (yellow), Series4 (red), Series5 (teal), and Series6 (purple). Below the pie chart is a bar chart. The right-hand side features the "Widget Settings" panel, which is currently on the "Data" tab. This panel is used to configure the data source and series for the selected widget. Red circles with numbers 1 and 2 highlight specific settings in the "Data" tab.

**Widget Settings - Data Tab**

- Data Source:** Dataset Data
- Dataset:** ds1
- Category:** None
- Series Name:** Field Value (Field Name)
- Series:** Product
- Value:** Sales\_Volume
- Summary Met...:** Sum
- Data Filter:** Category
- Display:** Cancel Form Settings

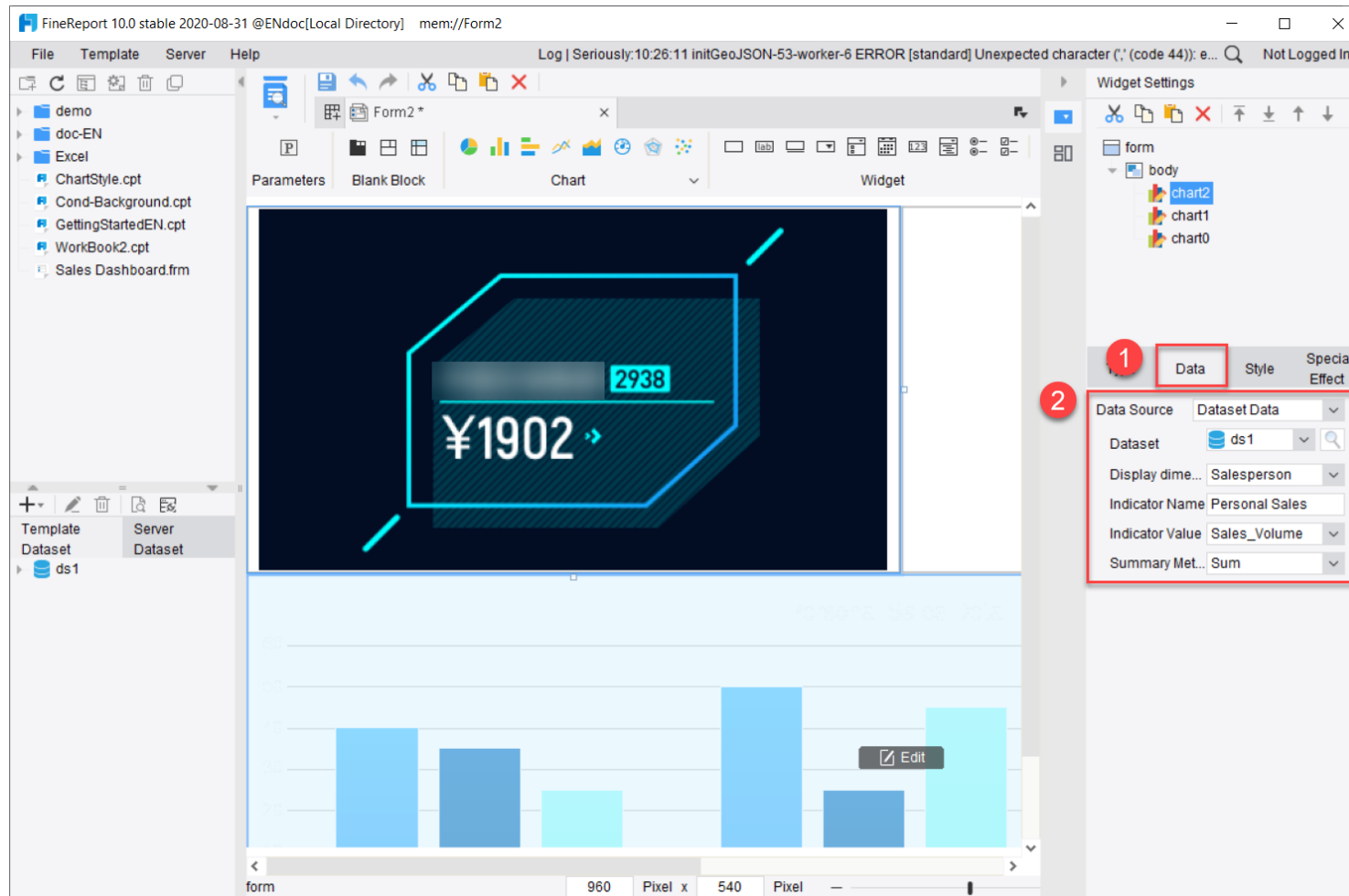
- Go to [Style] tab, and click [Title]. Enter the title text [Product Sales Proportion], and set the color to white.



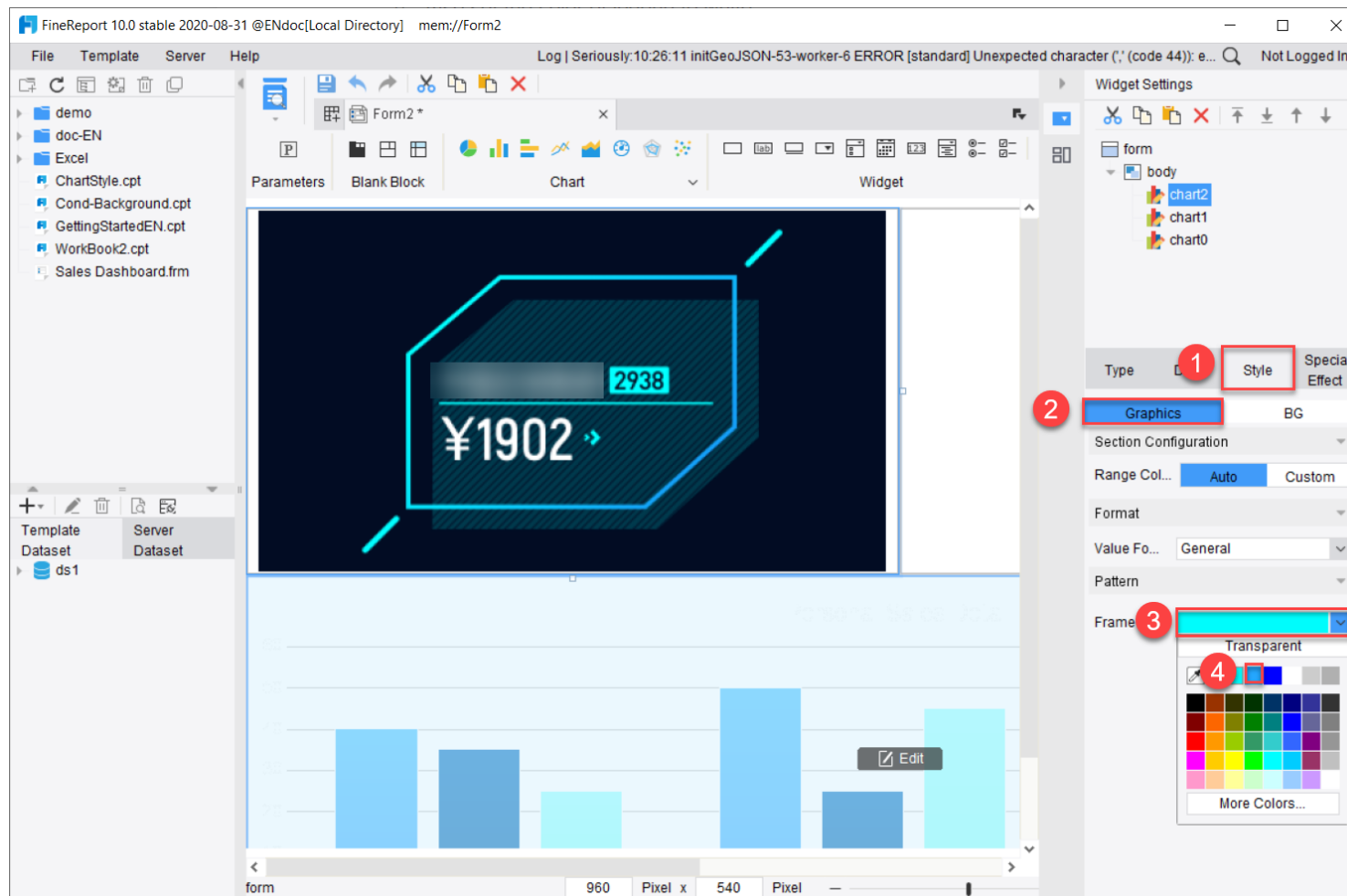
- Also set the color of legend to white.
- Go to [Series] tab, and change the chart series style to [Business Highlight]

### 3. KPI Indicator: Personal Sales Summary

- Double click on KPI Indicator.
- To bind the data, please go to [Data] tab on the right. Settings are as follow:



- Go to [Style]>[Graphics], set the frame color to business blue.

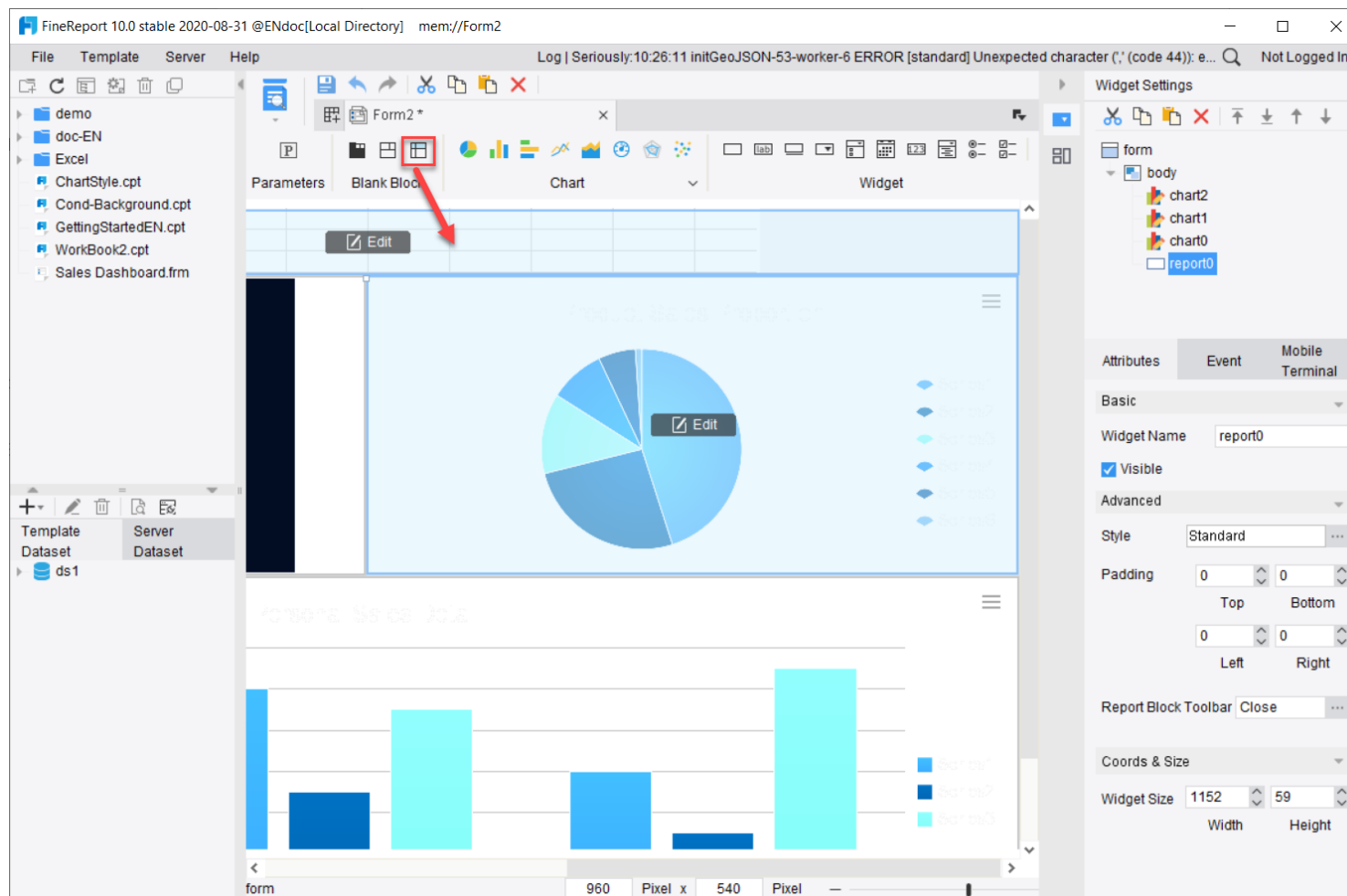


## IV. Title Block

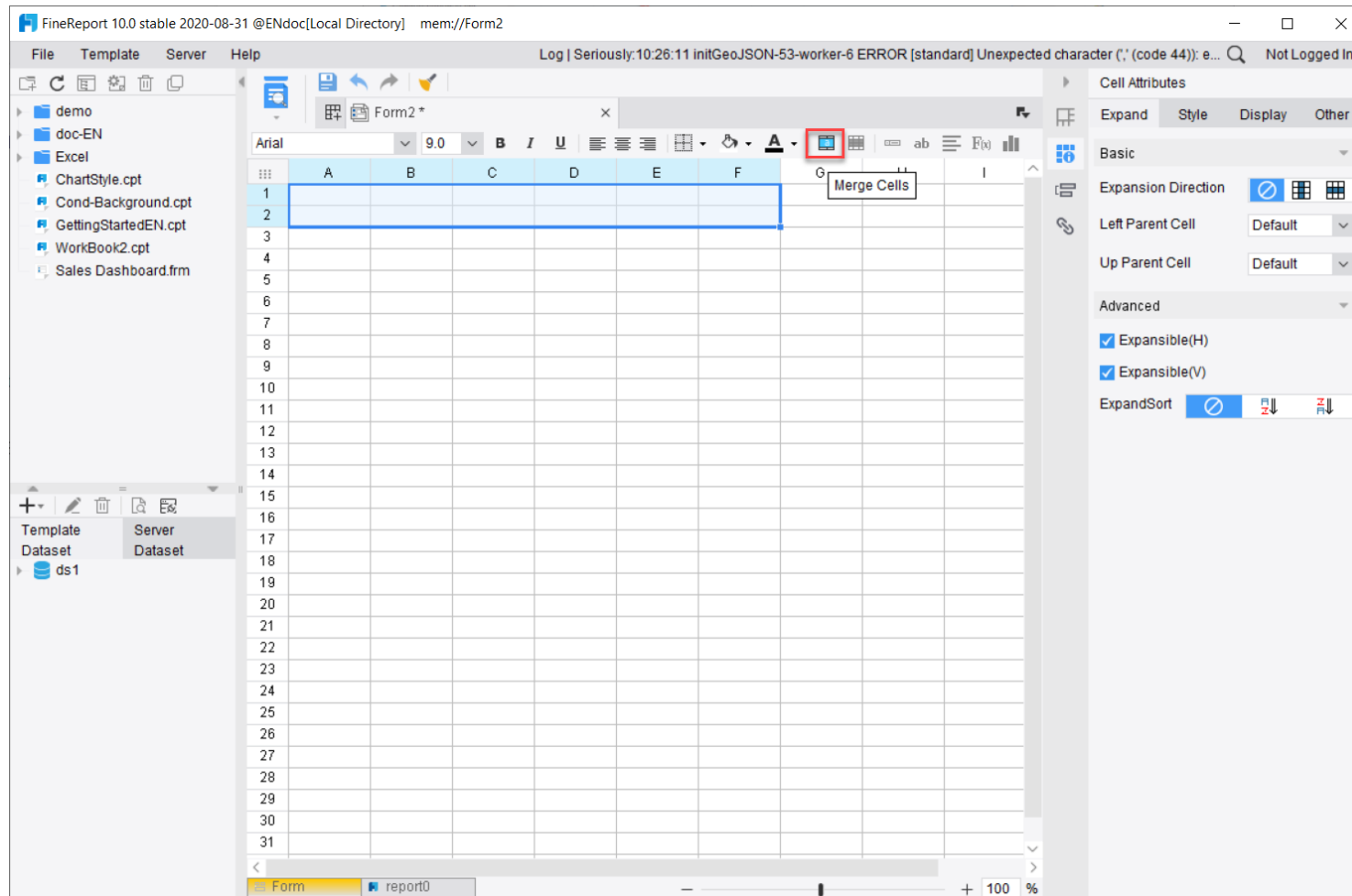
Finally, let's design the title of the dashboard. And make it jump to another report after click.

### 1. Report Block and its Design

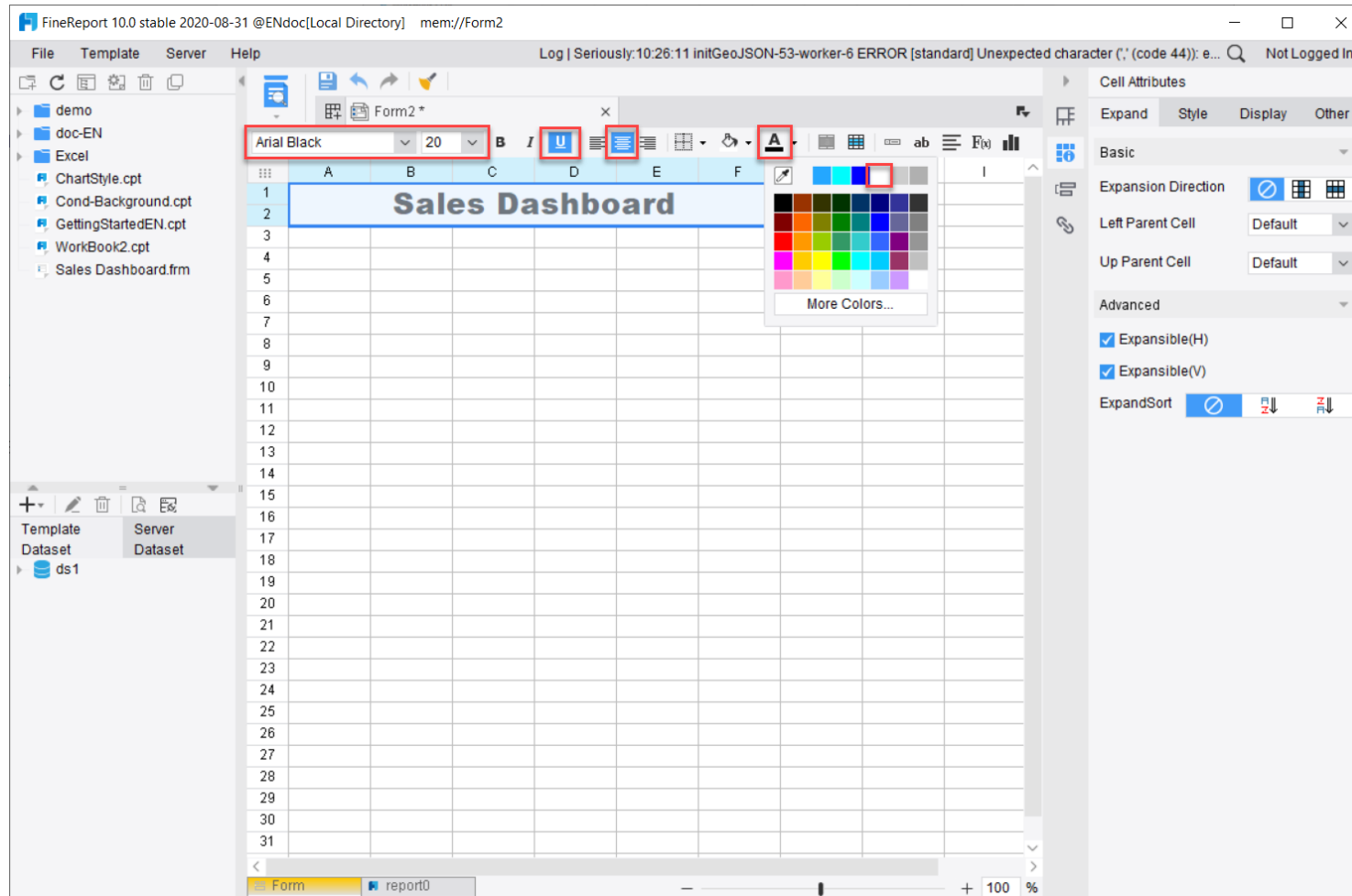
- Drag in the report block and adjust the size.



- Double click the report block to edit.
- Merge cell A1~F2.

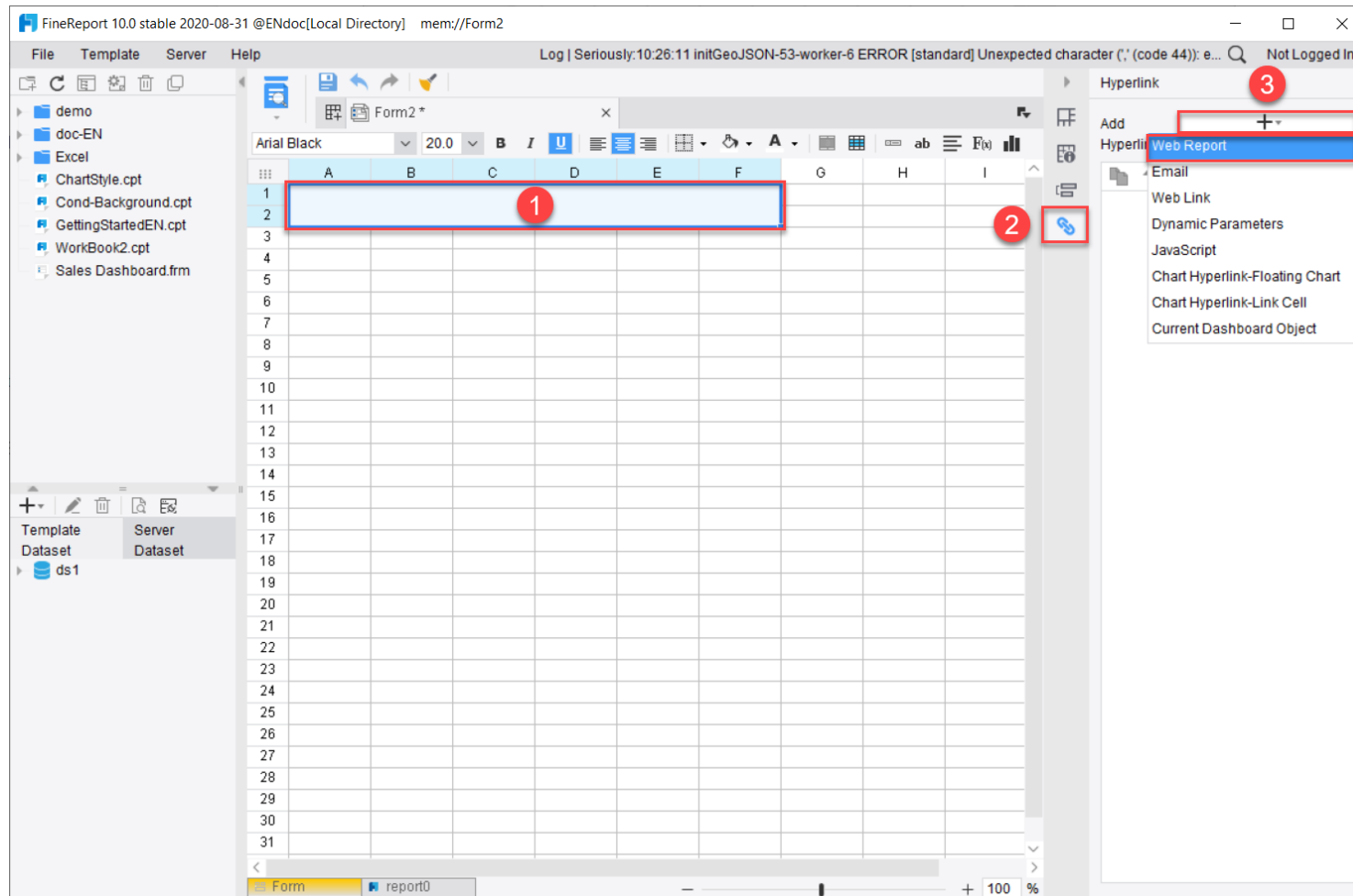


- Enter the title [Sales Dashboard] and adjust the format as follows:

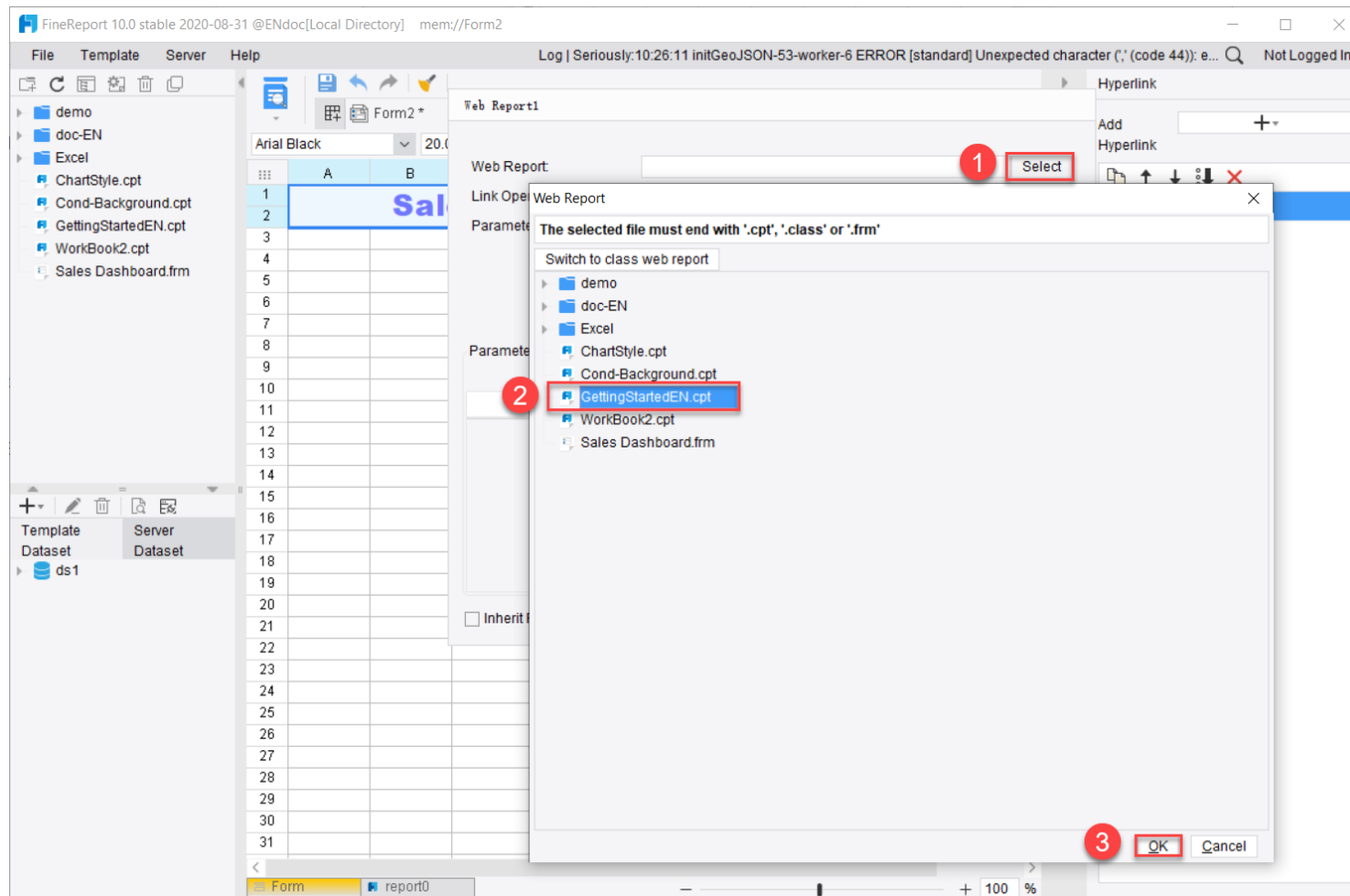


## 2. Hyperlink

- Click on the cell. Go to [Hyperlink], click [+]>[WebReport].

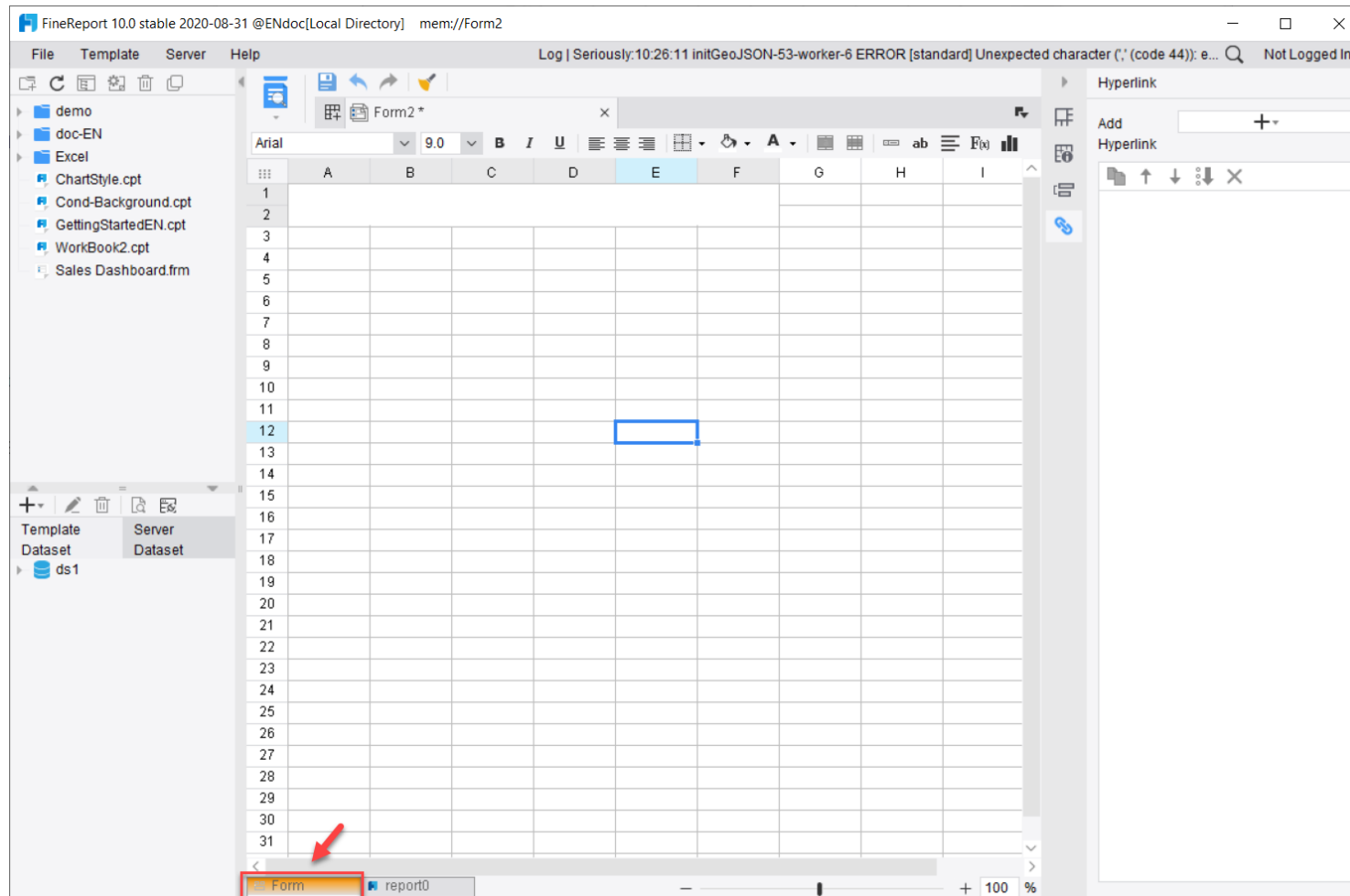


- Select GettingStartedEN.cpt to be the target report.

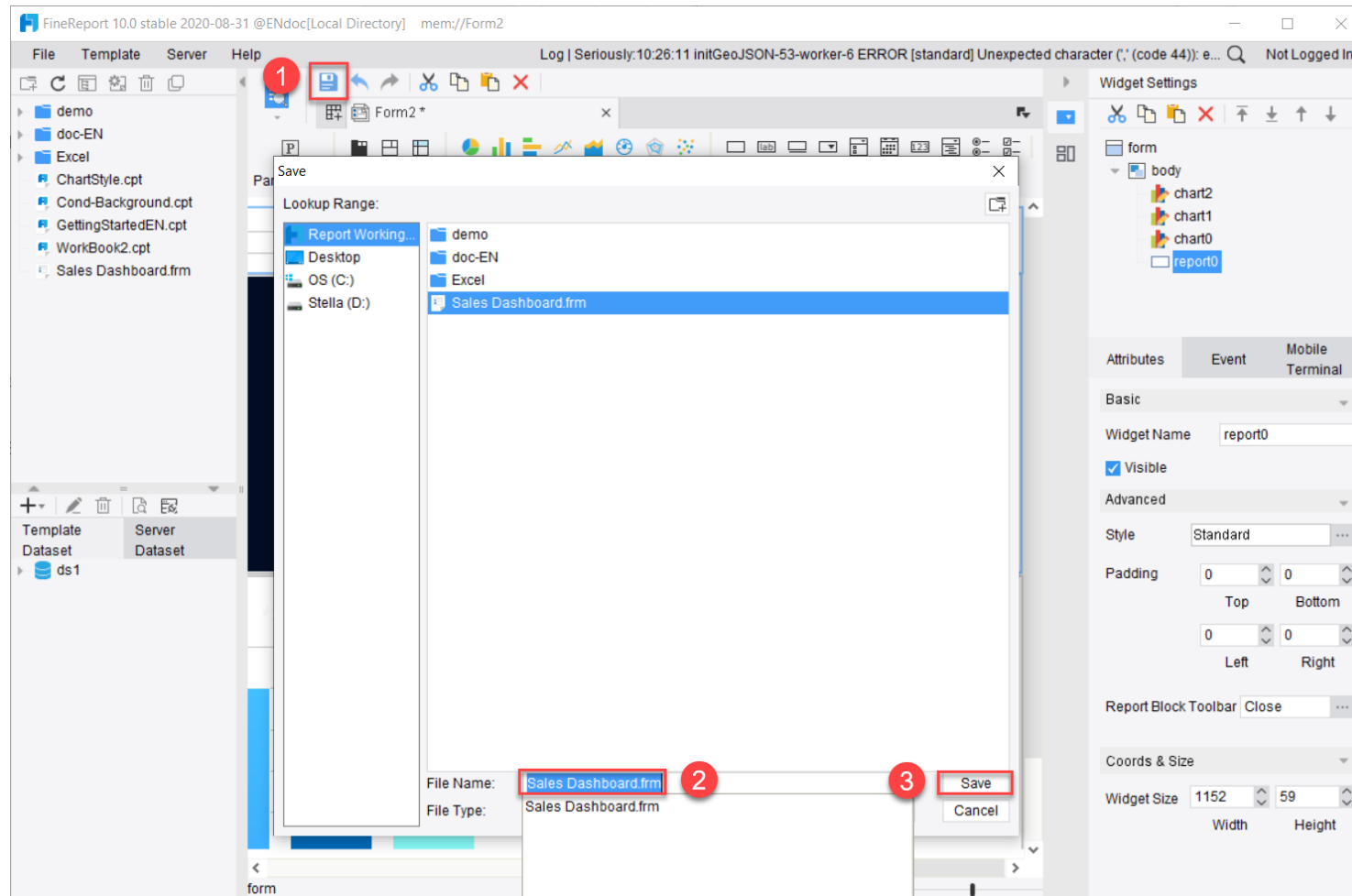


## V. Save and Preview

- Click on the [form] tab at the bottom left to go back to the canvas.



- Click [Save] and save it as Sales Dashboard.frm



- Click [Preview] to preview the final dashboard.

