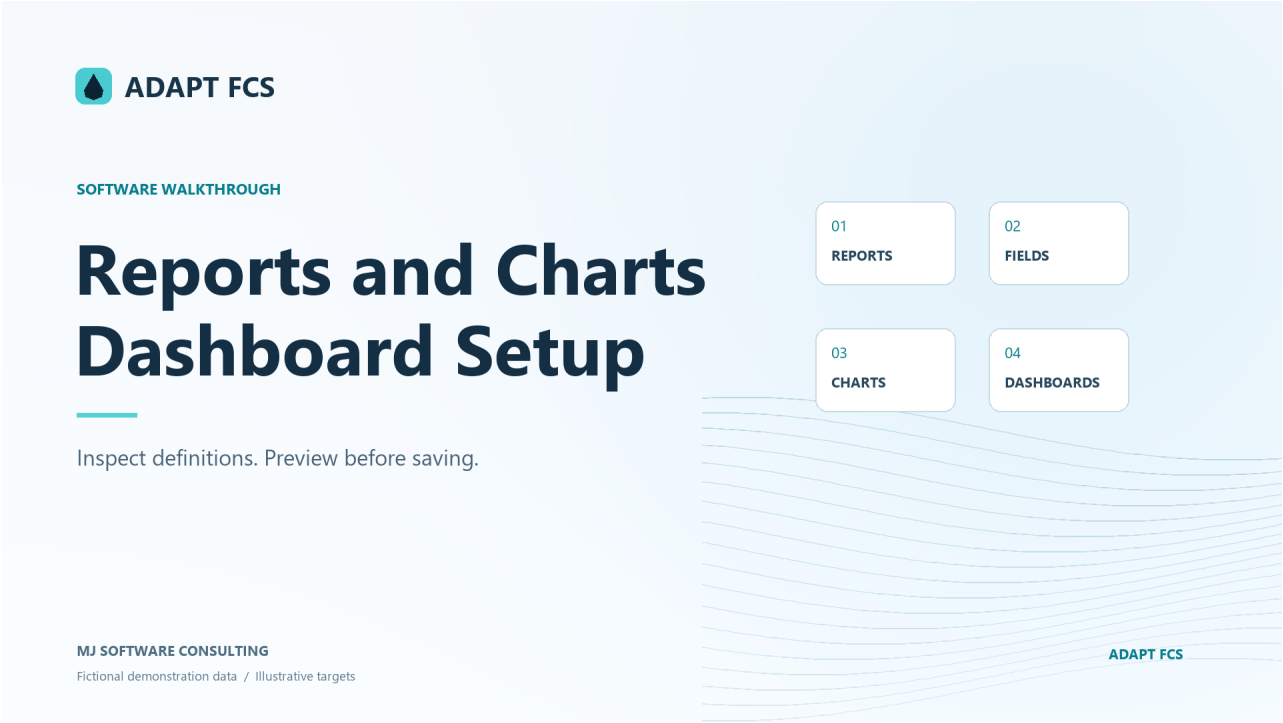
Configure Reports Charts and Dashboards

Inspect existing report and chart definitions, preview an unsaved report, and examine dashboard sections and card sizing using the existing administrator tools.

Version 1 | Narration and screenshots | 3 minutes

Watch the video online
https://app.adaptfcs.com/videos/water-quality/configure-reports-charts-and-dashboards.html



Introduction - 00:00

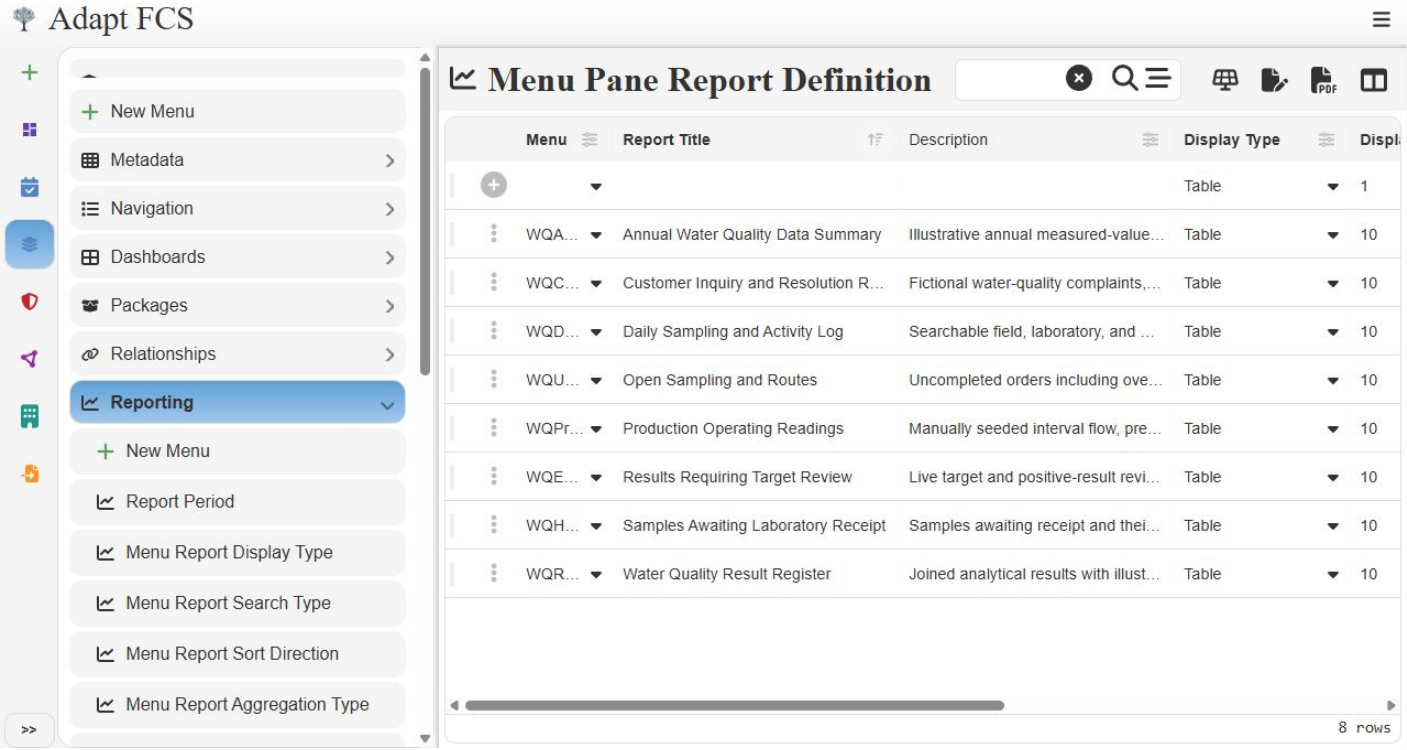
Adapt FCS includes administrator tools for shaping reports, charts, and dashboards. This walkthrough inspects existing Water Quality definitions, previews a small unsaved report, and explains how dashboard sections and card sizes affect the working view. All drafts are cancelled, and the existing configuration is preserved.

This PDF contains the complete narration and relevant screenshots. The linked page includes the video, chapter controls, captions and downloads.

Fictional demonstration data and illustrative targets. This walkthrough does not determine regulatory compliance.

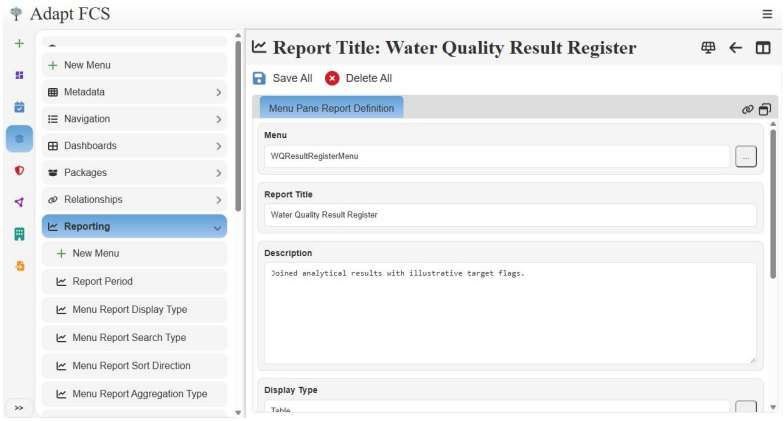
00:23 | Inspect saved report definitions

Administrators can inspect the definitions behind the working views. This register lists existing Water Quality reports, including the result register, sampling queue, holding review, and annual summary. These are configuration records. We are using the existing private administrator site, not granting ordinary demo users access to these tools.



Administrator: Foundation > Reporting > Menu Pane Report Definition

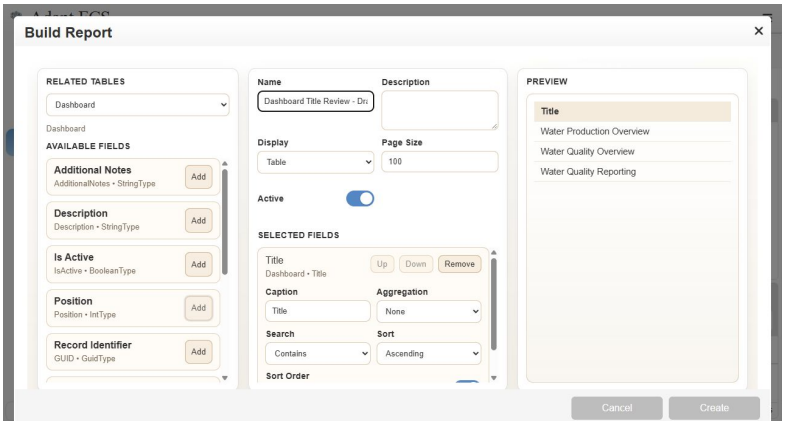
00:46 | Separate report presentation from its data



Water Quality Result Register: menu, title, and description

Opening the result-register definition shows its menu association, title, and description. Other settings include display type, ordering, and page size. The underlying query determines the data the report can use. Presentation changes can often be made through configuration, while new calculations or missing data sources may still require development.

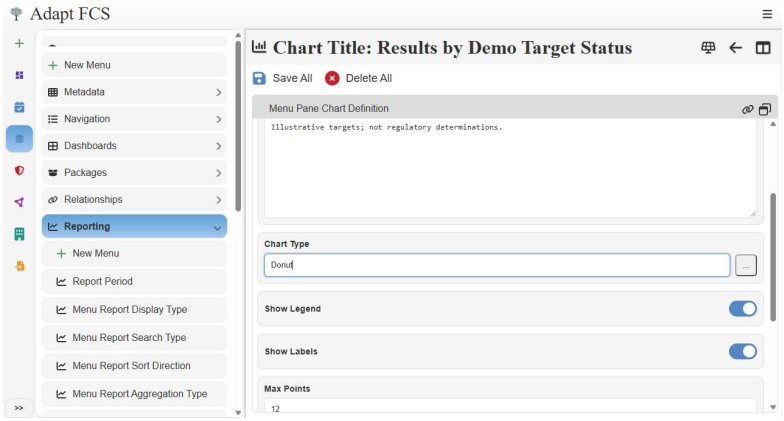
01:12 | Preview a report before creating it



Unsaved administrator example: Dashboard titles sorted ascending

The Build Report dialog provides related-table and field selection, captions, aggregation, search, and sorting. Here, an unsaved administrator example selects Dashboard Title and sorts it ascending. The preview displays the three existing dashboard titles. We cancel this draft. This is a configuration example, not a newly published operational report or a regulatory output.

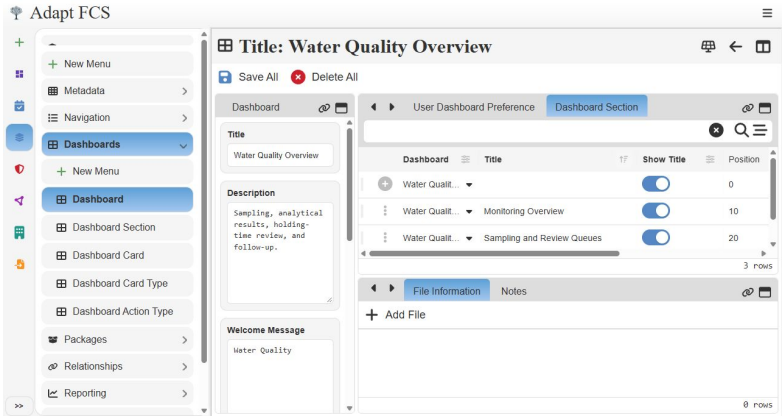
01:38 | Inspect chart presentation settings



Existing target-status chart: Donut, legend, labels, maximum points

The existing target-status chart has a Donut chart type, a visible legend, labels, and a maximum point setting. These control presentation. The saved query fields supply the grouping and count used by the chart. A different visual treatment does not validate the underlying thresholds or turn illustrative target flags into regulatory determinations.

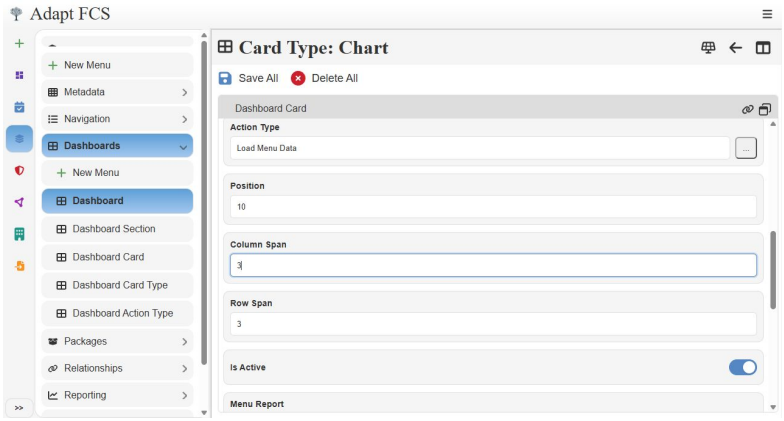
02:03 | Organize a dashboard into sections



Water Quality Overview > Dashboard Section

Dashboard definitions organize content into named sections. Water Quality Overview has Monitoring Overview, Sampling and Review Queues, and Trends and Reporting. Section titles, position, visibility, and activation settings help organize the working view. These are administrator configuration choices; effective access to the underlying data still needs its own authorization checks.

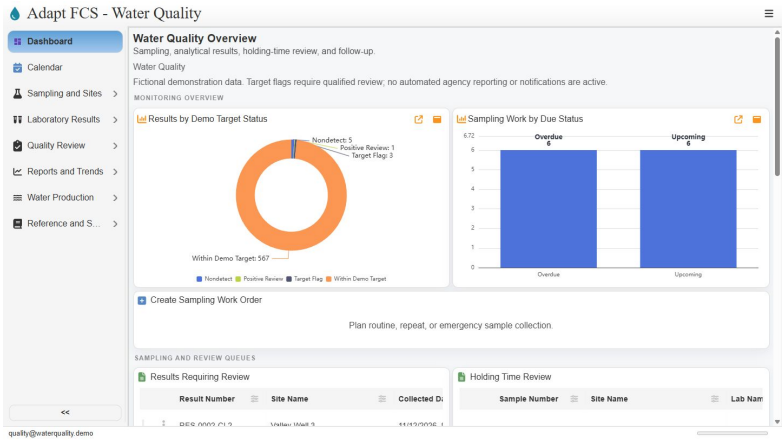
02:30 | Set the size and placement of a card



Existing chart card: position 10, column span 3, row span 3

Within Monitoring Overview, the target-status card refers to the saved chart and its source menu. Position controls ordering, while column and row spans allocate space. This existing card uses three columns and three rows. We inspect the configuration without saving changes, adding a new card, or altering the working dashboard.

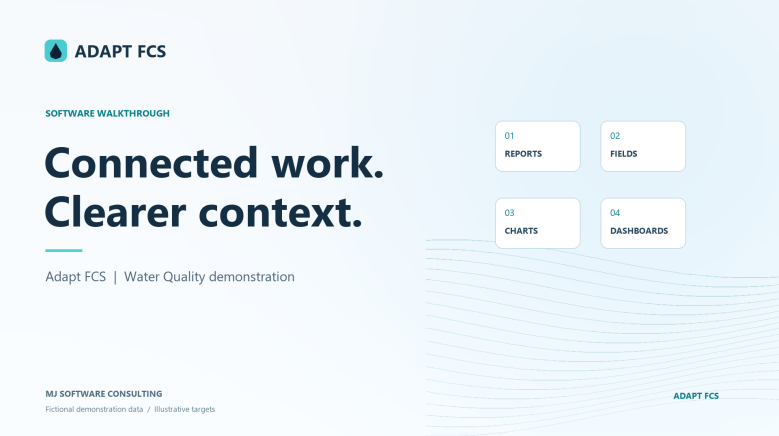
02:52 | Review the existing working result



Existing Quality dashboard; no configuration changes applied

The working dashboard brings the configured charts and sampling action together. This walkthrough shows how existing definitions, a report preview, chart options, and card layout relate to that experience. A deployment should validate data, permissions, performance, and output before publishing configuration changes. No application development or saved configuration changes were needed for this demonstration.

03:20 | Closing



Closing card.

Instrumental closing; no narration.