University Analytics & Institutional Research

UAccess ANALYTICS

Next Steps: Creating Presentation Variables

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Record of Changes		
Date	**Version #**	**Description**
11/03/2015	1.00	Original
11/18/2019	2.00	Added the cover graphic, updated branding to UAIR; added info about Analytics Office Hours to page iv; updated all images. Brought the entire document into the present.

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About this Booklet

This UAccess Analytics booklet is designed to help you become familiar with creating presentation variables.

This booklet is generic by necessity, but will provide you with the information you need to create and use your own presentation variables.

Access to Analytics Data

Request for Individual access to UAccess Analytics can be submitted to **https://request.uaccess.arizona.edu**.

UAccess Community

The UAccess Community is an online networking resource available to everyone on campus who use UAccess Systems.

If you have an official UA email address, you can establish membership in the UAccess Community. Just go to **http://community.uaccess.arizona.edu** and click the Join the conversation link on the left side of the screen.

Once you've established your membership, you'll have access to valuable information about all of the various aspects of UAccess Systems. You'll want to join one or more of the Forums within the Community, because that's where the value comes in.

Please take advantage of the opportunity and become a member of the UAccess Community.

Analytics Office Hours

Schedule some time with an instructor for help with analysis and dashboard creation or other questions. Register for Analytics Office Hours sessions through UAccess Learning. From the Find Learning screen, click the One-on-One link in the left menu bar.

Prerequisites

You should be familiar with creating a basic analysis, probably having gone through the Basic Reports and Dashboards workshop at some point. You should also be familiar with creating a basic Dashboard Prompt.

If you haven't actually created analyses of your own, you should certainly be familiar with the process.

At a minimum, you should have read and understand the contents of the **UAccess Analytics: Basic Reports and Dashboards** and **Working with Dashboards: Creating a Dashboard Prompt** booklets. You can download a copy of each document from **UAccess Community > Resources > Analytics** web page.

What is a Presentation Variable?

A Presentation Variable is a variable you create in both a dashboard prompt and in two or more analyses that come from two disparate subject areas, which then allows you to use that one prompt to filter both of those analyses at once.

Presentation variables are an alternative to using one analysis as the filter for a second analysis or, alternatively, using two different dashboard prompts on a single dashboard page.

Presentation Variables will work provided the values in data columns being used as a filter in each of the analyses are the same.

Overview

There are just a few basic steps you need to accomplish to get your analysis working with action links. Of course, there are many intermediate steps, but it's helpful to start with a quick outline.

1. **Create the different analyses** and determine which data columns (with common values) will be used as filters. Create presentation variable filters using the common data columns. The fewer columns used in conjunction with the prompt, the better. Additional filters may be added to each analysis, but should not be prompted filters.
2. **Create the dashboard prompt** which will be used to filter the analyses created in the first step.
3. **Create the dashboard page** and include the dashboard prompt and the different analyses.

Premise

You've Already Created Your Analyses

You have created three useful analyses and wish to put them all on one college dashboard page. The idea is that the reports would be hard filtered to the college, but users would be able to select a particular department by using a dashboard prompt. The problem is that each of the reports comes from a different subject area.

The Payroll Expenditure Listing report comes from **KFS – Labor Ledger Entries**, the Graduate Assistants/ Associates analysis comes from **HCM – Employee Position History**, and the ABOR report uses **HCM – Employee Profile**.

You would like to put those three reports on one dashboard page, then create a single dashboard prompt that would filter all three of the analyses. The only way to do that is to use a presentation variable.

Determining Which Data Columns Can Be Used for the Presentation Variable

In order for a presentation variable prompt to work with multiple analyses, there must be one data column in each analysis that contains the same values as a data column in each of the other analyses.

If you peruse what you can see of each of the three reports above, you'll see that the department number column in each report seems to contain the same values. That's exactly what you need, and exactly what will work.

If these reports were to be placed on a dashboard that was accessible to the entire University, you might also have to use the college-level data column as a filter. You could certainly do that. You're not restricted to using just one data column as the basis for a presentation variable. Any columns that you use, however, must have matching

values. In this case, the reports will go on a college-level dashboard. We don't need to think too far ahead.

## Creating or Editing the Presentation Variable Filter

Now that you've identified the column you're going to use, you must edit each of the analyses and include a filter that will be accessible by the dashboard prompt. This is not a typical prompted filter. This one is special. We'll use the Payroll Expenditure Listing analysis as the example in this document.

Procedure

1. **Edit** the analysis and navigate to the criteria tab.

   This report, which was taken from an existing dashboard, already has an

   Organization-Code filter. If it didn't, you'd have to create it. In this situation, you just need to edit the filter.

   There are many other lines of information in this filter, including two repository variables and a session variable. That's okay. The Organization-Code filter will be the only one affected by the prompt.
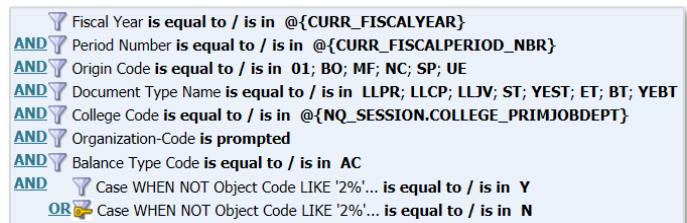
2. **Hover** your mouse over the Organization-Code filter, and select **Edit**.

3. Change the operator to **is equal to / is in**. Do not enter a Value.

4. Click the **Add More Options** button and select the **Presentation Variable** option.

5. In the **Variable Expr** field, type in the name you wish to use for your variable. This is not a filter value. This is just the name for the variable. You might call this variable **Department_Number**.

   Note that there is no space in the variable. You should use underscores rather than spaces, and keep the name of the variable relatively short. Twenty characters or less is best.
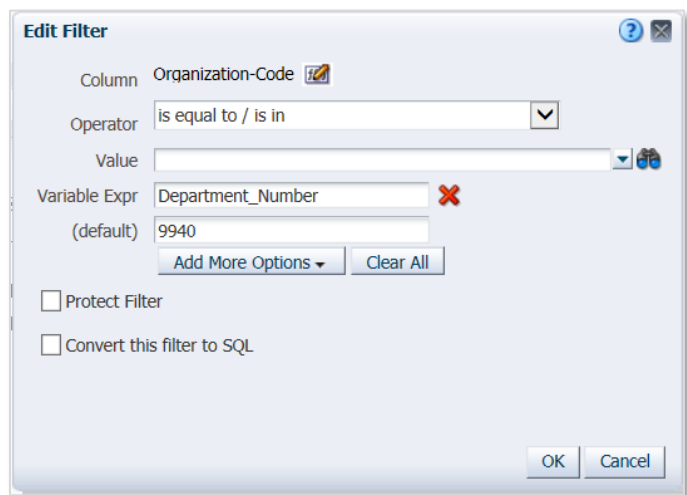
You could enter a value in the (default) field if you wish. Entering a (default) value will allow you to run the analysis by itself, without the prompt, for testing or other purposes. The (default) value will not affect the analysis when it's on the dashboard page.

6. Click **OK** to save the modified filter. The filter will display the variable.

Organization-Code **is equal to / is in** @{Department_Number}

7. **Save** the analysis.

8. **Repeat** the steps above on the other analyses you'll be adding to the dashboard page. Be sure to use the same presentation variable name in each filter.

Creating and Editing the Presentation Variable Dashboard Prompt

Creating the Dashboard Prompt

Now that you've edited all of the analyses you're going to put on your single dashboard page, you can create the dashboard prompt.

Procedure

1. On the global header, click **New > Dashboard Prompt** or select More > Dashboard Prompt in the Create section of the Home page.

2. Select one of the three subject areas from which your three analyses was created. In this example, we've selected **HCM – Employee Profile**.

3. When the new dashboard prompt screen opens, click the **Add Prompt** button and select **Variable Prompt**.

Column Prompt...
Variable Prompt
Image Prompt

4. On the **New Prompt** screen, which properly and helpfully defaults to **Presentation Variable**, enter the name of your presentation variable – **Department_Number** – in the field to the right of the Prompt for field.

5. Enter a label in the **Label** field, if you wish. If you enter nothing, the name of the prompt will be the same as the name of the presentation variable. Sometimes, those underscores confuse people.

6. Enter a **Description**, if desired. The description appears if a user hovers their mouse pointer over the prompt label.

7. Change the **User Input** field option to **Choice List**. This will allow the user to select their department number from a list.
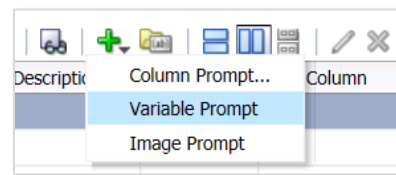
8. In the **Choice List Values** field, change the option to either **All Column Values**, which allows user to select the department number from a list of all department numbers from around campus, or **Specific Column Values**, which allows you to limit the values from which the user can select.

9. Use the **Column** field and **Select Column** button to identify the specific data column from this subject area that lists column numbers. Since you've selected the HCM – Employee Profile subject area, you'll open up the Department table, then select the Job Department data column.

10. Click the **Options** button to expand the screen. Select any other options you wish. Typical choices are **Enable user to select multiple values** and **Enable user to type values**.

11. Enter a **Default** selection, if desired. This is typically a good idea, as it limits the scope of the data that runs by default on the page.

12. Click **OK** when you're done creating the prompt field.

Editing the Dashboard Prompt to Match Standards

Procedure

1. Click the **Edit** (pencil) button in the **Display** section of the screen.

2. Delete the information in the **Title** field.

3. Change Prompt Display to **Place label above prompt**.

4. Change the Prompt Buttons option to **Place buttons on side of prompts**.

5. Click **OK**.

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Creating the Dashboard Page

Now that you've created or edited the analyses, and have created the dashboard prompt, it's time to put them all together on a single dashboard page.

You likely already have the dashboard set, so just need to create the new page, then add the special presentation variable prompt and reports.

Procedure

1. Navigate to the appropriate dashboard set.

2. Click the **Page Options** button and select **Edit Dashboard**.

3. Click the **Add Dashboard Page** button, give the new page a name, and click **OK**.

4. In the **Catalog** pane on the lower left, expand the appropriate folder tree and locate your new prompt and the modified analyses.

5. **Drag** the prompt into the dashboard page and drop it in place. A column and a section will be added to the dashboard page along with your prompt.

6. **Add** the analyses to your page, arranging them in some appropriate fashion. Be sure that the prompt is in its own section, and that the analyses are not in the section with the prompt. This is in accordance with standard formatting procedures.

7. **Edit** the different sections as follows:

   a. For the prompt section:

      i. Click the **Properties** button and remove the check from **Collapsible**.

      ii. Click the prompt section **Properties** button again and select **Rename**; enter "Make your selection and click Apply" in the field.

      iii. Click the prompt section **Properties** button again, select **Show Section Header**, click the button again, and select **Show Section Title**.

   b. For the other sections, click the **Properties** button and remove the check from **Collapsible**.

8. Click the **Save** button, wait for the Saved notice, then click **Run**.

9. **Test** your dashboard to make sure all analyses respond properly to the dashboard prompt.

Review

In this training guide, you've created or edited the analyses to include a presentation variable, created a dashboard prompt using the same presentation variable, then put them all together on a single dashboard page. Finally, you tested the page and it works properly.

Just to review, presentation variables are used to control filters on reports that come from different subject areas, but which contain data columns that have matching values in those columns.

One alternative to using a presentation variable would be to create one analysis and use it as a filter for a second analysis. That way, you'd only have to prompt the first report.

A second alternative would be to put the two or three reports on a single dashboard page, then create a separate prompt for each analysis.