

# UAccess ANALYTICS

## Next Steps: Creating Report Selectors

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<b>Record of Changes</b>		
<b>Date</b>	<b>Version #</b>	<b>Description</b>
08/10/2015	1.00	Original

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### *About this Booklet*

This UAccess Analytics booklet is designed to help you become familiar with creating Report Selectors. This dashboard tool was developed by members of the UAIR team specifically for use with UAccess Analytics. There is no Analytics Help documentation available.

This booklet is generic by necessity, but will provide you with the information you need to create basic Report Selectors.

For information on workshops in which you can learn how to build analyses and dashboards please go to the Workshops and Training Team website at <http://workshops.arizona.edu>.

### *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 request membership in the UAccess Community. Just go to <http://community.uaccess.arizona.edu> and click the Sign Up link in the upper right corner of the screen.

Once your membership is confirmed – usually within a few hours – you’ll have access to valuable information about all of the various aspects of the UAccess systems. You’ll want to join one or more of the groups within the Community, because that’s where the value comes in.

There is a Welcome Center available through a link on the Home page, as well as a great set of frequently asked questions (FAQs) linked through the top menu. Be sure to browse through the different Forums, check out upcoming Events, and peruse the extensive Resources provided through the Community.

Take advantage of the opportunity and become a member of the UAccess Community now.

## Next Steps: Creating Report Selectors

### Prerequisites

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

At a minimum, you should have read and understand the contents of the **UAccess Analytics: Basic Reports and Dashboards** booklet. You can download a copy of the latest version of that document from **UAccess Community > Resources > Analytics**.

You'll also need to be familiar with creating dashboard prompts. For information about creating prompts, download the **Working with Dashboards: Creating a Dashboard Prompt** document from the **Analytics Resources** page on the **UAccess Community**.

You should also be familiar with some next-level functionality available on dashboards, such as creating conditional dashboard sections. The instructions are included in this booklet, but familiarity with the basic functions is important.

### What is a Report Selector?

A Report Selector is special type of dashboard prompt from which users can select a specific analysis they wish to view on a dashboard, from among several reports placed on a dashboard in separate, conditional sections.

A user may wish, for example, to see a list of student employees, including information coming from the HCM – Employee Profile subject area.

Alternatively, the user may want to see the student's academic record, pulling data from the CSW – Student Profile subject area.

With a Report Selector, the user decides which report to see when they need it. . This is generally more efficient than scrolling through a very long dashboard to see all of the different possible reports.

You can add as many reports as you wish to a report selector.

## Overview

There are several major processes involved in creating a Report Selector. There are also many intermediate steps. It's helpful to start with an outline.

1. **Decide** which analyses you will be including on the dashboard page.
2. **Create** the analyses if you haven't already done so. The reports should be internally filtered, and should not rely on a dashboard prompt to run. Decide what the names of the reports will be in the Selector.
3. **Decide** what term you'll use to create the dashboard prompt / Report Selector. This term, word, or phrase should be short and unique.
4. **Create** the dashboard prompt/report selector using presentation variables, using the names decided on above.
5. **Edit** the different analyses to include a filter that will function properly with the dashboard prompt / Report Selector. That filter will include the unique names you decided on earlier for each analysis.
6. **Create** the dashboard, placing the Report Selector and the different reports on the dashboard. Each item must be in a separate section.
7. **Edit** the sections, making each section containing a report conditional so that each section appears only when the correct report is selected.

## Premise


### You've Already Created Your Analyses

We'll assume you have already created two useful analyses that you wish to put on one dashboard page. In this instance, we'll use a basic employee report and a basic student report. In this document, we're leaving out the names of the employees and students for the sake of privacy. We'll use the words **Employee** and **Student** to identify the different reports.

Department Student Employees						
Supervisor Employee ID	Employee ID	Hire Day Date	Position Number	Position Description	Hourly Pay Rate	Annual Salary
02182717	23107119	06/09/2011	2008066	Student Group B	8.50	8,908.00
06807252	23089099	01/14/2013	2018620	Student Group B	12.50	13,100.00
	23178896	05/26/2015	2010010	Student Group B	10.00	10,480.00
09805509	01934433	05/16/2011	2029628	Student Group D	21.87	22,919.76
	02182717	05/18/2009	2022305	Student Group D	21.87	22,919.76
	02818775	05/14/2012	2024512	Student Group B	10.00	2,096.00
	13408761	06/03/2002	2029629	Student Group D	21.53	22,562.39
	23106237	10/04/2012	2017463	Student Group B	8.05	8,436.40
	23128187	10/15/2013	2014249	Student Group B	8.50	8,908.00
12209183	22053456	06/13/2011	2014663	Student Group B	8.50	8,908.00
	23248113	04/13/2015	2022307	Student Group D	28.00	29,344.00
22061463	23234000	01/20/2015	2030150	Student Group B	9.00	9,432.00

Job Department is equal to / is in **0719**  
and ABOR Code Description is equal to / is in **Student Worker**

Department Student Employees - Student Profile			
Person Id	Academic Career Description	Primary Major Academic Plan	Cumulative GPA
01934433	Graduate	MEPHMS	3.80
		MEPHPHD	3.85
	Medical School	MEDMD	0.00
	Undergraduate	PRPND	3.11
02182717		PSIOBSHS	3.36
	Graduate	MEPHPHD	4.00
	Undergraduate	MCBBS	4.00
02818775		PSYCBS	4.00
	Pharmacy	PHMYPD	3.91
	Undergraduate	CHEMBS	3.07
13408761		PRPND	3.70
	Graduate	MEPHMS	3.34
	Undergraduate	BIOCBS	2.84
		BMBBS	3.01
22053456	Undergraduate	MCBBS	2.84
		PSYCBS	2.70
	Graduate	MEPHMS	0.00
5237	Undergraduate	BIOCBS	1.61
		MCBBS	2.73
	Undergraduate	GNSBGS	2.53
7119		MICRBS	2.64
	Undergraduate	PRNUND	2.40
		HISTBA	3.25
8187		PRPHND	3.02
	Graduate	ABBSDLP	0.00

Person Id is equal to any Employee ID in  Department Student Employees

## Creating the Dashboard Prompt

A Report Selector is really just a specialized version of a dashboard prompt. That's one of the reasons – the main reason, really – that the reports you're going to add to the page and have available via the Report Selector should be internally filtered. They should not rely on a dashboard prompt or other reports for filtering.

This version of a dashboard prompt uses a Presentation Variable – a custom variable with a name and values decided on by the prompt creator.

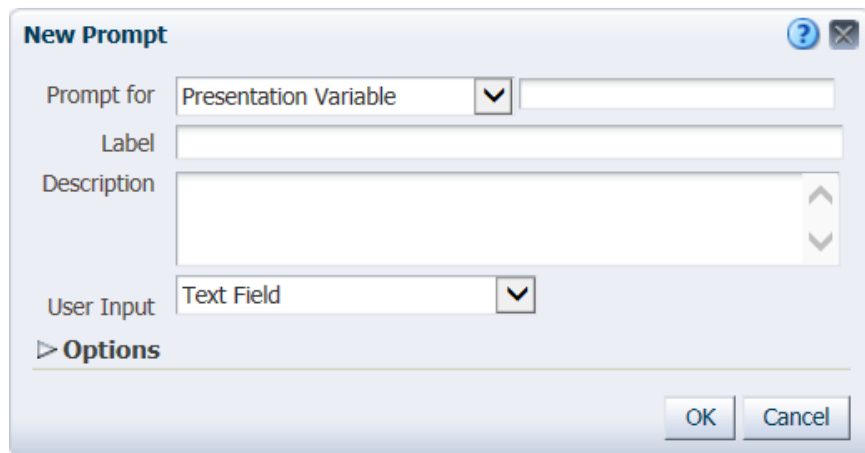
## Getting Started with the Prompt

When you create a typical dashboard prompt, you usually have to match the subject area you're using for the prompt to the subject area you used to create the analysis you're prompting.

The reports you're going to be using come from two different subject areas, however. In other situations, that would be a problem. With Report Selectors, it's not important at all.

### Procedure

1. **Click** the **New** link on the Global Header and select **Dashboard Prompt**.
2. **Select** any readily-available subject area. It truly doesn't matter which. The first one in the list will suffice.
3. Once the prompt screen opens, **click** the **New** button (green plus sign) on the **Untitled** prompt screen and select **Variable Prompt** from the short list.
4. The **Edit Prompt** screen defaults to creating a **Presentation Variable**. You just have to give it a name. Enter the name in the field to the right of the **Prompt for Presentation Variable** field.



The screenshot shows a 'New Prompt' dialog box with the following fields and options:

- Prompt for:** A dropdown menu currently showing 'Presentation Variable'.
- Label:** An empty text input field.
- Description:** An empty text area with scroll arrows.
- User Input:** A dropdown menu currently showing 'Text Field'.
- Options:** A section header with a right-pointing triangle icon.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

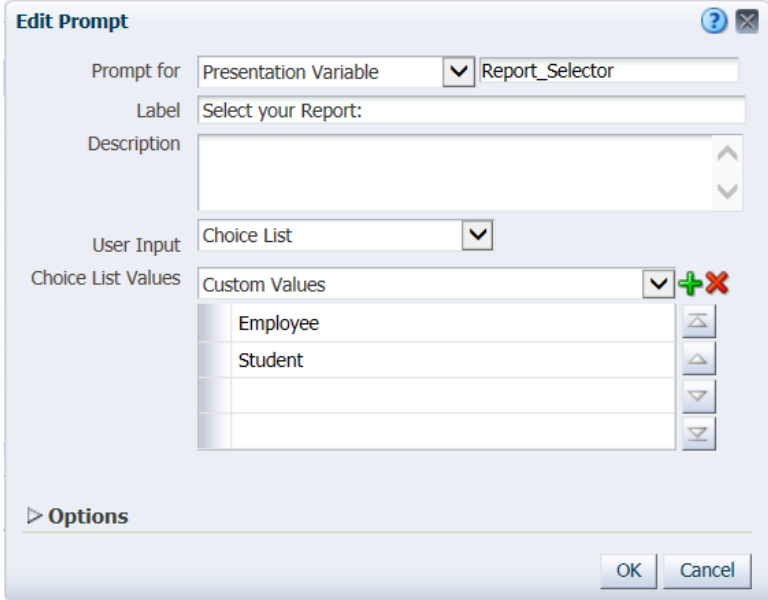
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You can use any word or phrase you like. We'll use **Report\_Selector** as our example.

5. Enter the name **Report\_Selector** in the field.
6. Enter **Select your Report:** in the **Label** field.
7. Change the **User Input** field to **Choice List**.
8. Leave the **Choice List Values** field set to **Custom Values**, then click the **Select Values** (green +) button.
  - a. Enter either of the values – we've entered **Employee** – in the **Enter New Value** field. Click **OK**. This will make the Employee report appear.
  - b. Click the **Select Values** button again, enter the other value – we've entered **Student** – in the **Enter New Value** field, and click **OK**. This will cause the Student report to be shown.

Your Edit Prompt screen should look similar to the image here.



**Edit Prompt** ? ✕

Prompt for: Presentation Variable

Label: Select your Report:

Description:

User Input: Choice List

Choice List Values: Custom Values

Employee	<input type="button" value="↑"/>	<input type="button" value="↓"/>
Student	<input type="button" value="↑"/>	<input type="button" value="↓"/>
	<input type="button" value="↑"/>	<input type="button" value="↓"/>
	<input type="button" value="↑"/>	<input type="button" value="↓"/>

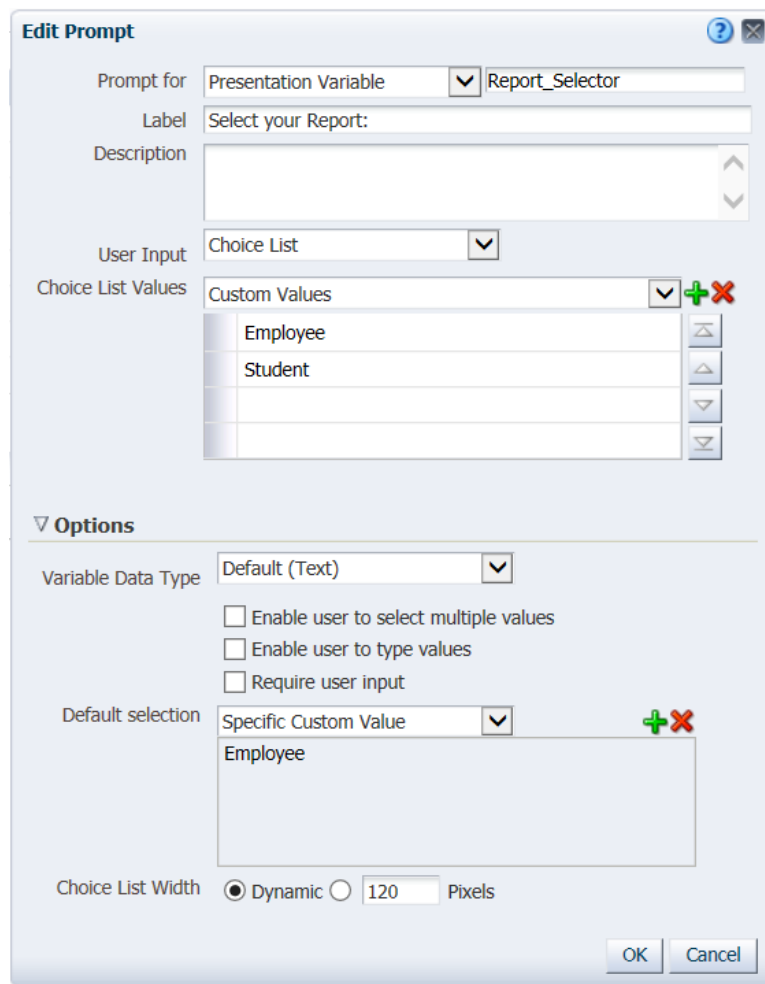
Options



## Finishing the Prompt

1. Click the **Options** drop-down button to open the remainder of the Edit Prompt screen.
2. Change the value in the **Default Selection** field to **Specific Custom Value**.
3. Click the **Select Values** (green +) button and select one of the values – we've selected **Employee** – from the Select Values screen. **This option must always be used and it must always have a default value entered when you're creating a report selector.** Click **OK**.

Your New Prompt screen should resemble the image here.



**Edit Prompt**

Prompt for: Presentation Variable Report\_Selector

Label: Select your Report:

Description:

User Input: Choice List

Choice List Values: Custom Values

Employee
Student

**Options**

Variable Data Type: Default (Text)

Enable user to select multiple values

Enable user to type values

Require user input

Default selection: Specific Custom Value

Employee

Choice List Width:  Dynamic  120 Pixels

OK Cancel

4. Click **OK** on the New Prompt screen.
5. **Save** the Dashboard Prompt/Report Selector to an appropriate folder.

## Editing the Analyses

Remember that you have two (or more) analyses that you're going to place on one dashboard page. You'll also be adding the Report Selector you just created. Before you can do any of that, however, you need to edit the filters in any reports you're including in the Report Selector and on the page so they will function with the prompt.

### Adding the Presentation Variable Filter

In this booklet, you're going to be adding two reports to the dashboard. Each of them must have a special filter added so that the report appears only when it's selected. Let's add the filter to the **Employee** report first.

#### Procedure

1. Click the **Open** button on the global header, then locate and open your **Department Student Employee** analysis.
2. Click the **Criteria** tab.
3. Click the **Options** button on any column and select **Filter** from the menu. It doesn't matter which column you use. Just select one.
4. Check the box to **Convert this filter to SQL**, then click **OK**.
5. Delete the default text from the **Advanced SQL Filter** screen.
6. Enter the following text – exactly – into the field on the Advanced SQL Filter screen. Be sure to include the single quotes and all curly brackets and other symbols:

**'@{Report\_Selector}{Employee}' = 'Employee'**

The different pieces of the filter you're creating each have different functions.

- The "at" symbol just tells the system this is SQL.
  - The words in the first set of curly brackets tells the system that this filter will function with a dashboard prompt with that name.
  - The text in the next set of curly brackets should be the same as the text after the equal sign. This text and the matching text tell the system it's okay to run the report by itself, without the dashboard prompt. This gives you the ability to test the analysis without having to put it on the dashboard. If you leave this part out, you can't test the report by itself.
  - The text in single quotes after the equal sign tells the report to run when that value is selected in the Report Selector
7. Click **OK**.
  8. Save the analysis.

## Repeat the Process

You've added a presentation variable filter to one of the two analyses that are going on the dashboard page. You need to add another presentation variable to the other report now. In this exercise, that's the **Student** report.

### Procedure

1. Click the **Open** button on the global header, then locate and open your **Department Student Employee – Student Profile** analysis.
2. Click the **Criteria** tab.
3. Click the **Options** button on any column and select **Filter** from the menu.
4. Check the box to **Convert this filter to SQL**, then click **OK**.
5. Delete the default text from the **Advanced SQL Filter** screen.
6. Enter the following text – exactly – into the field on the Advanced SQL Filter screen. Be sure to include the single quotes and all curly brackets and other symbols:

**'@{Report\_Selector}{Student}' = 'Student'**

7. Click **OK**.
8. Save the analysis.

## Creating the Dashboard Page

This is one of the easier major steps, but there are some stickier spots where you'll have to pay attention to detail.

### Add the Report Selector to the Dashboard

#### Procedure

1. **Navigate** to the empty dashboard page you wish to use.
2. Click the **Edit** button in the center of that page.
3. In the **Catalog** pane, navigate to and open the folder where the Report Selector has been saved.
4. **Drag** the **Report Selector** into the dashboard and drop it in place. It will bring a Column and a Section with it.
5. Click the **Properties** button for the section and remove the checkmark from **Collapsible**.

## Adding the Analyses

Now you just need to add the analyses themselves to the page.

### Procedure

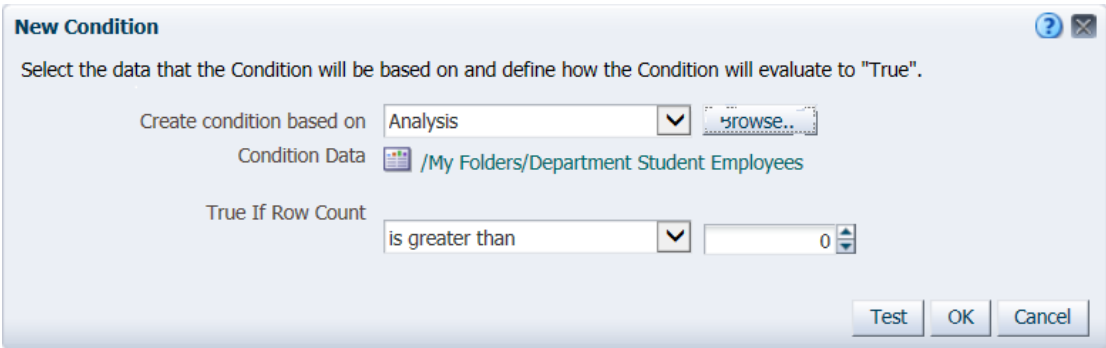
1. In the **Catalog** pane, navigate to and open the folder where the analyses have been saved.
2. **Drag** the **Employee** analysis into the dashboard and drop it in place. It will bring a Section with it.
3. **Repeat** for the **Student** analysis. Be sure to drop this item into a new section.
4. Click the **Properties** button for each section that contains an analysis and remove the checkmark from **Collapsible**.

## Setting Conditions for the Analysis Sections

You've got the basic setup arranged for the dashboard. If you click **Save** and **Run** right now – feel free to do so – both of the analyses will be visible on the dashboard. The idea of the selector is to show just one report at a time. If you're looking at the dashboard, click the **Page Options** button then **Edit Dashboard** to make the report sections conditional.

### Procedure

1. **Click** the **Properties** button for the Employee section; select **Condition**.
2. Click the **New Condition** button. It looks like a martini glass.
3. On the New Condition screen, click the **Browse** button then navigate to and select the **Employee** analysis. The screen should look like this:



4. Click **OK**, then click **OK** on the **Section Condition** screen.
5. Repeat steps **1-4** for the section containing the **Student** analysis.

The condition that you've created for each section tells the system to only show that section when the total row count for the selected report is greater than zero. That will only be true for whichever analysis has been selected using the Report Selector.

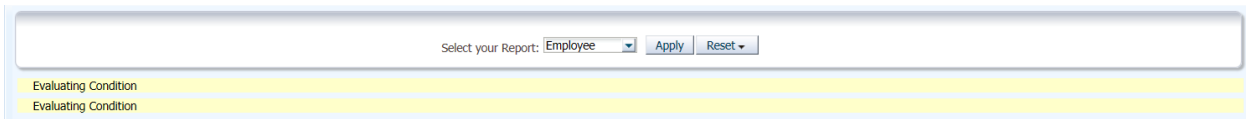
## Testing the Dashboard

You've created the dashboard, and added the Report Selector and the two analyses. You've put each item into its own section, and set conditions for each of the sections containing reports. You're ready to test things out and make sure the dashboard works as you wish.

### Procedure

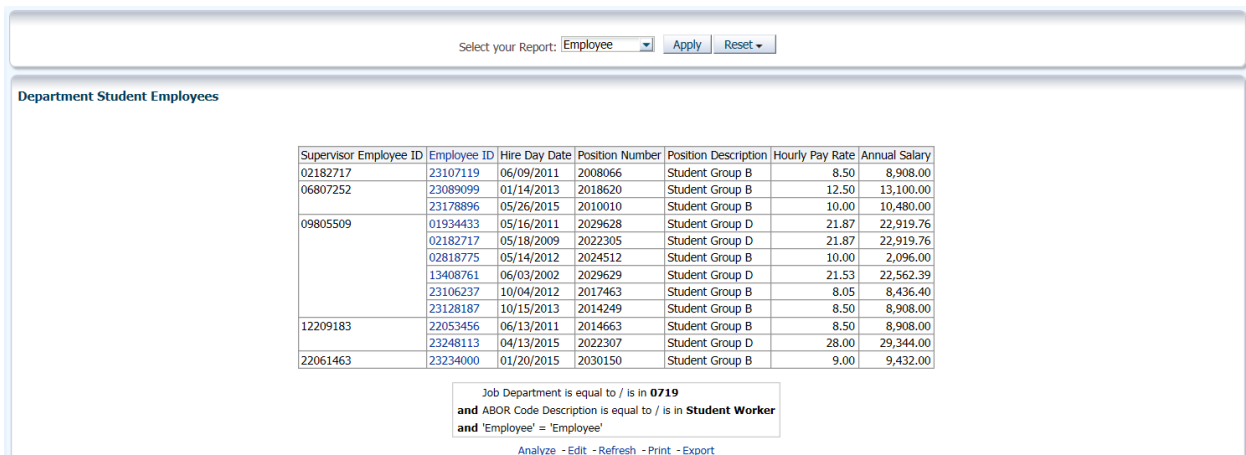
1. **Click the Save** button on the dashboard, then click **Run**.

The dashboard will begin running for the first time. What you'll likely see for a few moments is something like this:



Those two yellow bars are the conditional sections, each of which is evaluating the condition contained in the section. Only the section that contains a report that actually has some rows – the analysis selected in the Report Selector – will reveal itself on the dashboard.

Once the dashboard actually runs with the default selection of **Employee**, you'll see only the **Department Student Employees** report.



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## Next Steps: Creating Report Selectors

2. Use the Report Selector to select the **Student** option, then click **Apply**.

The Employee report section will disappear and the Student section and report will appear.

Select your Report: Student Apply Reset

Department Student Employees - Student Profile

Person Id	Academic Career Description	Primary Major Academic Plan	Cumulative GPA
01934433	Graduate	MEPHMS	3.80
		MEPHPHD	3.85
	Medical School	MEDMD	0.00
	Undergraduate	PRPND	3.11
		PSIOBSHS	3.36
02182717	Graduate	MEPHPHD	4.00
	Undergraduate	MCBBS	4.00
		PSYCBS	4.00
02818775	Pharmacy	PHMYPD	3.91
	Undergraduate	CHEMBS	3.07
		PRPND	3.70
13408761	Graduate	MEPHMS	3.34
	Undergraduate	BIOCBS	2.84
		BMBBS	3.01
22053456	Undergraduate	MCBBS	2.84
		PSYCBS	2.70
	23089099	Graduate	MEPHMS
Undergraduate		BIOCBS	1.61
		MCBBS	2.73
23106237	Undergraduate	GNSBGS	2.53
		MICRBS	2.64
		PRNUND	2.40
23107119	Undergraduate	HISTBA	3.25
		PRPHND	3.02
23128187	Graduate	ABBSOLP	0.00

Rows 1 - 25

Person Id is equal to any **Employee ID** in **Department Student Employees II** and 'Student' = 'Student'

[Analyze](#) - [Edit](#) - [Refresh](#) - [Print](#) - [Export](#)

3. Click the **Reset** button and select **Reset to default values**.

The Employee analysis will appear, and the Student report will disappear.

Although a Report Selector likely isn't something you'd create every day on every dashboard, it's a handy tool to have in your toolbox for those occasions when they do come in handy.

