

UACCESS ANALYTICS

Next Steps: Working with Bins, Groups, and Calculated Items: Combining Data Your Way



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Training Guide Working with Bins



About this Booklet

This UAccess Analytics booklet is designed to help you become familiar with Bins, Groups, and Calculated Items in UAccess Analytics.

For more information on **Bins**, please refer to the **Edit Column Formula dialog: Bins tab** section of the UAccess Analytics online Help documentation at https://analytics.uaccess.arizona.edu/analytics/olh/l_en/biee0096.htm.

For more information on **Groups** and **Calculated Items**, refer to the **Working with Groups and Calculated Items** section of the UAccess Analytics online Help documentation at https://analytics.uaccess.arizona.edu/analytics/olh/l_en/filter011.htm.

This booklet is generic by necessity, but will provide you with the information you need to build and maintain your own basic bins or groups.

For information on workshops in which you can learn how to build analyses and dashboards, as well as information about other brown bag demonstrations, 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 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

If you're interested in Bins, you should be familiar with creating a basic analysis, probably having gone through the Basic Reports and Dashboards workshop at some point. If you haven't 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 booklet. You can download a copy of that document from UAccess Community > Resources > Analytics Resources.

If you're interested in Groups, you should be familiar with how dashboards work, including some aspects of the right-click menu.

Preliminary Definitions

- **Bins** are structures created by an analysis builder for a specific column of data. With bins, you can combine values for that column into a cohesive set or sets of values. You determine what bins are needed for any specific data column and which of the values present in that data column should go into what bin.
- **Groups** are bin-like structures, but they are created directly on a dashboard by any Analytics user. You simply select the values you wish to have included in the group using a right-click menu.
- **Calculated Items** are also created by Analytics users directly on the nearly any dashboard page. The difference between Groups and Calculated Items is that, with calculated items, you can change the way numeric values associated with the rows of data used in the calculated item are combined.

Overview

There are just a few basic steps you need to accomplish to create **Bins** in your analysis. Of course, there are many intermediate steps, but it's helpful to start with a quick outline.

- 1. Create and/or edit your analysis.
 - a. Decide which column and column values you wish to include in your bins.
- 2. Create your bins using the Column Formula screen for the column and values you selected in step 1.a.

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Working with Bins



Groups are created by Analytics users directly on the existing analyses on nearly any dashboard page.

- 1. Access the desired dashboard page and analysis.
 - a. Decide which column and column values you wish to include in a group.
- 2. Select the desired column values, right-click on one of those selected values, and create your group.
- 3. Remove the original column values to prevent duplication.

Calculated Items are also created by Analytics users directly on the existing analyses on nearly any dashboard page following the same basic steps as Groups. There is a difference, however, as mentioned above.

Premises or Assumptions

Bins - You've Already Created Your Analysis (Turn to Page 5)

The particular analysis used in this booklet for explaining Bins is a modified version of the **Income / Expense** analysis from the **Financials > General – Financial Management** dashboard.

For the purposes of this booklet, we'll assume that you've already created a basic analysis similar to the one presented on the following pages, but have not yet created the bins.

As you created the analysis, your boss told you she wanted to see the Object Codes collected into different categories. Those categories are similar to, but not exactly the same as, the available Consolidation Object Codes or Names.

One way to gather the Object Codes into the desired categories is to use **Bins**.

Groups – You've selected the Dashboard (Turn to Page 11)

To create a group, you simply have to select the dashboard and analysis in which you wish to create the group. Once you've done that, you identify those values you wish to include in the group.



For the exercise in this booklet, we've selected the **Financials > General – Financial Management > Income Expense** dashboard. Using the **Summary by Object Code** view, we will group values in the Object Code column.

Calculated Items – You've selected the Dashboard (*Turn to Page 17*)

To create a calculated item, you select the dashboard and analysis in which you wish to create the item. Once you've done that, you identify those values you wish to include in the calculated item.

For the exercise in this booklet, we've selected the **Financials > General – Financial Management > Income/Expense** dashboard. Using the **Summary by Object Code** view, we will group values in the Object Code column.





What are Bins?

Bins are structures – many people think of them as buckets – created in the Edit Column Formula screen for a specific column of data.

Bins enable you to combine values for that column into a cohesive set or sets of values. As the builder of the analysis, you determine what bins are needed for any specific data column and which of the values present in that data column should go into what bin.

The example used throughout this booklet uses the Object Code column of a specific analysis and "bins" the many different possible codes into ten distinct bins.

Creating Bins

The analysis in our example is constructed using the columns you see above, from the **KFS – Account Monthly and Cumulative** subject area. We started out by clicking the Analyze link on the **Financials > General – Financial Management > Income/Expense** dashboard. We then edited the **Department Summary – Fund Group by Consolidation Code** view to get the columns you see.

Bins - Object Codes				
Fund Group Name	Consolidation Object Name	Object Code	Object Code Name	2020
Agency	GENERAL EXPENSES	3180	Security	200.00
		3490	Other Professional Services	1,485.00
		4180	Parking Services	1,985.00
		5230	Office Supplies	813.76
Designated	CAPITAL	7000	CAPITAL- Budget	0.00
	GENERAL EXPENSES	3000	Other Direct Costs	0.00
		3125	Cloud Services	14,031.56
		3490	Other Professional Services	240,757.23
		3491	Other Pro Servi Reim (Pd to Third Party)	1,112.76
		3492	Other Pro Service Reimbursable Expenses	592.35
		3590	R/M Services-Office Furniture & Equipmen	1,781.57
		3620	R/M Services-Vehicle	374.97
		3780	R/M Services-Other	2,936.63

In the example, the Consolidation Object Name contains six different values: CAPITAL, GENERAL EXPENSES, INDIRECT COST RECOVERY EXPENSE, PERSONNEL SERVICES, STUDENT SUPPORT, and TRAVEL. Some of those values are close to what your boss wanted, but you need ten different values. You will not be able to use that column to create your categories, but it gets us started.



Plan Your Bins

Using the results from the initial running of the analysis, you should go through the Object Code column and determine how you need to break up the object codes into the ten bins your boss wants. Those bins are: Salaries, ERE, Operations – General, Operations – Training, Travel, Subcontracts, Student Support, Capital, Indirect Costs, and Unassigned Object Codes.

Each of the ten bins will contain a specific series of object codes. For example, the **Salaries** bin will include all object codes that begin with the number one (1). The **ERE** bin will include all object codes that begin with the number two (2). The **Travel** bin will include object codes 6000, 6100, 6140, 6200, 6240, 6340, and 7936. The other bins will include their own unique sets of object codes.

One method you might wish to use to get your lists of object codes for the different bins would be to export the data to Excel using the **Export > Data > Tab delimited format** function. You can then manipulate the data in Excel to gather the object codes into the proper groups.

The exact procedure will be different for every circumstance, and probably for nearly every person. The end result should be that you should have a list of the different object codes or other data arranged as you'd like to see the data put into Bins in Analytics.

For this analysis, we sorted the Excel results by **Consolidation Object Name**, then by **Object Code**. The Consolidation Object Name column is similar to what we need for the end results and is helpful in this instance in arranging the data. Then we selected the different values available in each Consolidation Object Name / Object Code combination and copied and pasted them into a second Excel sheet.

		Operations -	Operations -			Student			
Salaries	ERE	General	Training	Travel	Subcontracts	Support	Capital	Indirect Costs	Unassigned
1	2	3000	3150	6000	3340	6800	5750	7950	
		3100	3151	6140	3350	6860	7000	7955	
		3125	3230	6141		6880	7120	7956	
		3130	3310	6142			7620		
		3140	4150	6240			7670		
		3160	5520	6241			7690		
		3180	5610	6242			7710		
		3240	5890	6340			7730		
		3490		6341			7760		
		3491		6342					
		3492							
		3590							

We ended up with a spreadsheet that looked like this:



Create the Bins

Back in Analytics, you'll start on the **Criteria** tab and will edit the Object Code column's formula to create your bins.

Procedure

1. Click the **Options** button on the **Object Code** column and select the **Edit formula** option. You will see two tabs: Column Formula and Bins

it Column Form	nula		
olumn Formula	Bins		
Fol	lder Heading	Object Code	
Colu	ımn Heading	Object Code	
		Custom HeaContains HT	dings ML Markup
Aggregation Rule	(Totals Row)	Default (None)	•
Available		Colu	mn Formula
Subject Areas		Q [™] Ob	ject Code"."O

2. Click the Bins tab.

The resulting nearly-blank screen is a bit disconcerting until you notice the small **Add Bin** button in the lower left corner.

3. Click the Add Bin button.

Creating bins is really just a matter of creating filters to include specific values in the bin, then naming the grouped values. Here is where your Excel spreadsheet will come in handy.

 The first column in the spreadsheet tells us that we'll be building a Salaries bin. That bin will include all Object Codes that start with one (1). Change the **Operator** field to the "begins with" operator. Type a "1" in the **Value** field and click **OK**.

New Filter	r	@ ×
Column	Object Code	
Operator	begins with	
Value	1	▼ °,
	Add More Options Clear All	

- 5. Enter the name of the bin **Salaries** and click **OK**.
- 6. You will see your new bin, along with an option to create a bin for all other values. At the bottom of the screen you'll see the **Add Bin** and **Clear All** buttons.

Edit Column Formula			
Column Formula Bins			
1. TObject Code begins with 1 🛐 Salaries 🖂 🗶			
Create a bin for all other values			

7. Click the **Add Bin** button.

Training Guide

Working with Bins



- 8. This second bin will be for ERE. This filter is just like the first one. All of the Object Codes for ERE are those that begin with a two (2). Build your filter accordingly.
- 9. Click **OK** on the New Filter screen.
- 10. Enter ERE as the name of your new bin, then click OK.
- 11. The third bin is nearly as easy as the first two. Click the **Add Bin** button to begin.
- 12. Click the **Search** button (magnifying glass) in the **Value** field.
- 13. Click the Edit button (pencil) above the Selected field to open the Edit screen.
- 14. In your spreadsheet, select and copy all of the values from the Operations General column.
- 15. Paste the entire column of numbers into the **Edit** screen in Analytics. Click **OK** three times, then name your third bin **Operations General**.
- 16. Following these same steps, continue creating bins using the values in the remaining columns on your Excel spreadsheet.
- 17. Once you've created all of the bins that you need, you still have to account for any other object code numbers you may have missed in your initial list. Check the **Create a bin for all other values** checkbox.
- 18. Name this final bin Other Object Codes. Click OK.
- 19. Rather than clicking the OK button on the main **Edit Column Formula** screen, click the **Column Formula** tab. You'll discover what you've actually been doing is creating a CASE statement.

Had you known how, you could simply have typed the CASE statement in by hand. In this case, creating the bins was decidedly much simpler than trying to create that CASE statement manually.

You should note the comment at the bottom of the screen:

Select the 'Bins' tab to edit the definition of this column. If you wish to edit the formula directly, choose 'Clear All' from the 'Bins' tab.

- 20. Before you leave the Edit Column Formula screen, change the **Column Heading** to **Object Code Category**.
- 21. Click **OK**.
- 22. Click the **Results** tab. You will no longer see the list of Object Codes. Instead, you'll see the broad Object Code Categories you've created. You'll see your **Bins**.



23. Now that you've created the bins, you can **right-click** and **Exclude** the Object Code Name column. What you're left with is a relatively concise analysis in which the object codes are categorized as your boss requires.

Bins - Object Codes								
Fund Group Name	Consolidation Object Name	Object Code Category	2020					
Agency	GENERAL EXPENSES	Operations - General	4,483.76					
Designated	CAPITAL	Capital	0.00					
	GENERAL EXPENSES	Operations - General	1,076,916.13					
		Operations - Training	17,254.70					
	INDIRECT COST RECOVERY EXPENSE	Indirect Costs	31,594.50					
	PERSONNEL SERVICES	ERE	257,973.00					
		Salaries	893,769.03					
	TRANSFER OF FUNDS	Other Object Codes	5,553,578.19					
	TRAVEL	Travel	32,211.08					

Editing or Deleting Bins

Once you've created your bins, there may come a time when you'll have to edit those bins. In our example above, you might discover at some point that you've not included all of the required object codes in one or more of the bins you created. Fortunately, the editing procedure is quite simple.

Procedure

- 1. Open the analysis and click the **Criteria** tab.
- 2. Click the **Options** (gear) button on the **Object Code Category** column and select the **Edit formula** option.
- 3. Click the **Bins** tab, as you did earlier when you created your bins. You'll see the bins you created, and you have several options.

Edit	Column Formula			@ ×
Colu	umn Formula Bins a.	b.	c. d.	
1.	▼ Object Code begins with 1	Salaries 🚳	× ~	
2.	TObject Code begins with 2	ERE 🔤	X ~ ^	

a. If you wish to edit the **filter** for a bin, click the Edit Bin Filter (martini glass) button for that filter.



- b. If you wish to change the **name** of a bin, click the Edit Bin Name (pointing hand) button next to the name for that bin.
- c. If you wish to delete a bin, click the grey "X" button for that bin.
- d. You can also arrange your bins in any particular order you wish. Just use the **Move Down** or **Move Up** buttons.
- e. If you wish to remove all of the bins, click the **Clear All** button at the bottom of the screen.

If you click the **Clear All** button, a message prompts you to decide if you wish to keep the CASE statement on the Column Formula tab.

Choosing **Yes** will retain the CASE statement and the results you saw previously. This also opens the CASE statement for editing.

Choosing **No** will reset everything back to the original defaults, as if you'd never created the bins.

4. Click **OK** when you're done.



What are Groups?

A group, according to the Help documentation, is "a user-defined member of a column." A better definition, perhaps, is that groups are a way for a user to combine *multiple values* in any data column into *one value* so that the grouped values are viewed as one row rather than as multiple rows.

Here's a more succinct definition: groups are essentially bins created on the fly on any dashboard by any Analytics user! You simply select the values you wish to have included in the group or groups.

Groups are always displayed at the bottom of the column in which they were created, in the order in which they were created. Groups can contain other groups.

The groups you create will only last for as long as you're viewing that particular dashboard. If you wish to retain those groups for future use, be sure to save your dashboard customization.

Planning Your Groups

The same time and effort you put into planning your bins should go into planning your groups. You should lay out – in your head, on paper, in an Excel spreadsheet, etc. – how you are going to combine whatever data it is you're interested in.

Planning is a bit easier with groups, however, since you're already looking at the results in your report and you just have to decide how you'll be grouping the data. Be sure to fully expand the analysis before you continue.

In our example in this booklet, we're grouping the information in the same manner we did for creating bins. We're using the Object Code column to create Salaries and ERE groups.

The Salaries group will consist of all the object codes that start with a one (1), and the ERE group will include all of the object codes that start with a two (2).

Working with Bins



Creating Groups

Procedure

- 1. Navigate to the Financials > General Financial Management > Income/Expense dashboard.
- 2. Once the analysis runs, select the **Summary by Object Code** view. You should also expose all of the available data rows. You'll start with data that resembles this:

income / Expense												
			Sel	ect Report View: S	ummary by Obje	ct Code		•				
Account Number	Consolidation Object Name	Object Code	Object Code Name	Original Budget	Base Budget	Current Budget	Current Month Actuals	Fiscal Year Actuals	Inception to Date	Open Encumbrances	Pre- Encumbrance	Balance Available
1182500	PERSONNEL SERVICES	1000	Personal Services-Budget	340,865.00	243,865.00	1,105,967.03	0.00	0.00	0.00	0.00	0.00	1,105,967.03
		1150	Fiscal App/Fac Salaries (ere 4)	2,387,708.00	2,474,708.00	2,584,267.00	191,537.84	1,299,265.03	1,299,265.03	1,226,106.00	0.00	58,895.97
		1180	Classified Staff Salaries (ere 2)	48,000.00	58,000.00	54,985.00	4,009.97	27,551.06	27,551.06	24,461.00	0.00	2,972.94
		1190	Graduate Asst/Assoc Salaries (ere 8)	0.00	0.00	0.00	7,060.78	38,513.30	38,513.30	32,524.00	0.00	(71,037.30)
		1213	Supp Comp Grad (ere 8)	0.00	0.00	0.00	0.00	3,687.04	3,687.04	0.00	0.00	(3,687.04)
		1340	Student Wages (ere1)	0.00	0.00	0.00	82.50	3,718.00	3,718.00	4,392.00	0.00	(8,110.00)
		1360	Classified Staff Wages (ere 2)	0.00	0.00	34,883.00	2,664.00	18,633.20	18,633.20	16,250.00	0.00	(0.20)
		1375	Regular Appointed Wages	0.00	0.00	0.00	0.00	0.00	0.00	27,981.00	0.00	(27,981.00)
		2000	Employee Related Expenditure Budget	s 944,035.00	944,035.00	1,104,767.48	0.00	0.00	.0.00	0.00	0.00	1,104,767.48
		2117	Student Employees ERE	0.00	0.00	0.00	1.65	74.35	74.36	87.84	0.00	(162.20)
		2119	Graduate Assistants ERE	0.00	0.00	0.00	776.67	4,641.94	4,641.94	3,577.64	0.00	(8,219.58)
		2121	Employee Full-Benefit ERE	0.00	0.00	0.00	62,238.60	422,471.13	422,471.13	406,566.43	0.00	(829,037.56)
		2130	Graduate Tuition Benefit	0.00	0.00	0.00	0.00	26,009.50	26,009.50	0.00	0.00	(26,009.50)
	GENERAL EXPENSES	3000	Other Direct Costs	293,158.00	293,158.00	329,129.00	0.00	0.00	0.00	0.00	0.00	329,129.00
		3125	Cloud Services	0.00	0.00	0.00	0.00	4,738.75	4,738.75	0.00	0.00	(4,738.75)
		3160	Legal	0.00	0.00	0.00	0.00	0.00	0.00	20,000.00	0.00	(20,000.00)
		3230	Technical Consultants	0.00	0.00	0.00	0.00	25,000.00	25,000.00	35,000.00	0.00	(60,000.00)
		3490	Other Professional Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		3590	R/M Services-Office Furniture & Equipmen	0.00	0.00	0.00	413.68	1,310.21	1,310.21	0.00	0.00	(1,310.21)
		3780	R/M Services-Other	0.00	0.00	0.00	162.63	759.18	759.18	0.00	0.00	(759.18)
		3860	Toll Usage Charges	0.00	0.00	0.00	0.00	41.32	41.32	0.00	0.00	(41.32)
		4150	Educational Training	0.00	0.00	0.00	0.00	495.87	495.87	0.00	0.00	(495.87)
		4180	Parking Services	0.00	0.00	0.00	0.00	1,600.00	1,600.00	0.00	0.00	(1,600.00)

In this example, we'll create groups in the Personnel Services area of the analysis.

- Identify the specific Object Code values that you'd like to include in a specific group. For example, you could group all of the object codes that begin with a one (1) in a group called Salaries and all of the object codes that begin with a two (2) in another group named ERE.
- 4. **Click** in the cell that contains one of the values you wish to include in your first group.
- 5. Hold the **CTRL** key down on your keyboard and click in the individual cells for **all** of the remaining values you wish to include in your first group. If you inadvertently click on a cell you don't wish to include, just click the cell again to deselect it. You'll have something like this:



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PERSONNEL SERVICES	1000	Personal Services-Budget	340,865.00	243,865.00	1
	1150	Fiscal App/Fac Salaries (ere 4)	2,387,708.00	2,474,708.00	2
	1180	Classified Staff Salaries (ere 2)	48,000.00	58,000.00	
	1190	Graduate Asst/Assoc Salaries (ere 8)	0.00	0.00	
	1213	Supp Comp Grad (ere 8)	0.00	0.00	
	1340	Student Wages (ere1)	0.00	0.00	
	1360	Classified Staff Wages (ere 2)	0.00	0.00	
	1375	Regular Appointed Wages	0.00	0.00	
	2000	Employee Related Expenditures Budget	944,035.00	944,035.00	1
	2117	Student Employees ERE	0.00	0.00	
	2110	Graduato Assistante EBE	0.00	0.00	

- 6. **Right-click** on one of the selected cells and select **Create Group** from the menu.
- 7. Type the name **Salaries** into the **Display Label** field. Click **OK**.



The analysis will refresh itself and, at the bottom of the column of object codes in the Personnel Services section, you'll see a new item named **Salaries**.

You should also note that the original object code items are still present in the table. You have to remove the original rows of data, because right now your values are duplicated.

- 8. Once again, **select** all of the same object code values you previously selected. Use the CTRL key and the mouse as you did before.
- 9. Right-click on one of the selected cells and select Remove from the menu.

The analysis will refresh itself, having removed the selected individual object code rows from the analysis.

10. **Repeat** steps 3 – 9 above for each additional group you'd like to create.

In the example here, we've also right-clicked and **Excluded** the Object Code Name column. What we're left with are the two groups we created, with the dollar values totaled in the far-right column.

Consolidation Object Name	Object Code	Original Budget	Base Budget	Current Budget	Current Month Actuals	Fiscal Year Actuals	Inception to Date	Open Encumbrances	Pre-Encumbrance	Balance Available
PERSONNEL SERVICES	Salaries	2,776,573.00	2,776,573.00	3,780,102.03	205,355.09	1,391,367.63	1,391,367.63	1,331,714.00	0.00	1,057,020.40
	ERE	944,035.00	944,035.00	1,104,767.48	63,016.92	453,196.93	453,196.93	410,231.91	0.00	241,338.64

11. If you wish to retain those groups, be sure to save the dashboard customization via the Page Options button.



Viewing or Deleting Groups

Once you've created a group, you may have a need to view the values that are in the group. You might also wish to delete a group you've created.

Viewing a Group Definition

- 1. **Right-click** on the cell that contains the name of the group.
- 2. Select View Group Definition from the menu.

The system will present a small window displaying the values included in the group you created.

Close the window when you're through.

Deleting Groups

This procedure doesn't really delete a group, per se, but will surely removes the group from the analysis. It also restores the original rows of data.

- 1. Click the **Page Options** button in the upper-right corner of the dashboard screen.
- 2. Select Clear My Customization from the menu.

Note: This will remove all of the changes you've made to the dashboard during this session.

Remember, if you wish to retain your groups for future use, be sure to save your dashboard customization.

View Group Definition	
Remove	
Object Code	►



What are Calculated Items?

A calculated item is really just a group with one added feature or function. You, the creator of the calculated item, are able to determine how the calculated item will aggregate any numeric values included in the calculated item.

This means that, if a column of data were being summed, you would have the option of getting an average for the values included in the calculated item. You could alternatively get a count, a max value, a minimum value, or choose one of several other options.

Calculated items might be thought of as a way to get a particular type of aggregate value – an average, a count, etc. – from an analysis that doesn't inherently contain that aggregate value. Once you've retrieved the value, you could then delete the calculated item.

Just like groups, calculated items are always displayed at the bottom of the column in the order in which they were added.

Any calculated items you create will only exist for as long as you're viewing that particular dashboard. If you wish to retain the calculated items for future use, be sure to save your dashboard customization.

Planning Your Calculated Items

Just as you've done with bins or groups, you need to spend some amount of time planning your calculated items. You should lay out – in your head, on paper, in an Excel spreadsheet, etc. – how you are going to combine whatever data it is you're interested in and what aggregation method you're going to employ.

Planning is a bit easier with calculated items, however, since you're already looking at the results in your report and you just have to decide how you'll be grouping and aggregating the data. Be sure to fully expand the analysis before you continue.

In our example in this booklet, we're creating a calculated item to determine the average leave ending balance for employees in a specific department.



Creating Calculated Items

Procedure

- 1. Navigate to the **Employee > Leave Tracking > Leave Accrual** dashboard.
- 2. Once the dashboard runs, refer to the **Projected Hours Exceeding Allowed Carry Forward** analysis. You'll start with data that resembles this (the Employee Name column has been excluded):

Projected Hours Exceeding Allowed Carry Forward

	01/12/2020			
Employee Id	Hours Balance Year- to-Date	Estimated End of Calendar Year Vacation Balance *	Maximum Hours to be Carried Forward	Hours Exceeding Allowed Carry Forward *
00892514	239.32	408.57	264.00	144.57
01516448	270.77	440.02	264.00	176.02
01625064	127.93	297.18	264.00	33.18
01641132	175.27	344.52	264.00	80.52
01826346	92.00	244.33	238.00	6.33
01869660	117.18	286.43	264.00	22.43
02146031	270.77	440.02	264.00	176.02
02199835	270.77	440.02	264.00	176.02
02924404	96.93	266.18	264.00	2.18

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In this example, we'll create a Calculated Item in the Employee ID column.

- 3. Select the top Employee ID by clicking in the cell where that number lives, then scroll down to the bottom of the analysis, hold the SHIFT key on your keyboard, and select the bottom Employee ID. All of the cells in the Employee ID column and all of the cells to the right of that column will be colored blue when they're selected.
- Right-click on any one of the selected Employee ID numbers and select Create Calculated Item from the menu.
- Enter a label for the temporary calculated item and set the Function field to Average. Because you are only creating this calculated item on a temporary basis, you can leave the "Remove" checkbox as is. Click OK.

↑↓ Sort	•
Keep Only	
Remove	
Create Group	
Create Calculated Item	
Employee Id	Þ



New Calculated Item	0	×
Display Label Function Average Add to Ourrent View All Views Remove calculated item members from view		
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The analysis will refresh itself and will create the calculated item. Expand the analysis to view all rows.

6. The bottom-most row in the analysis will be your new calculated item.

Each of the values in that row will be an average of all of the values in the column above. In this department, the average Hours Balance Year-to-Date per employee is 190.30 hours.

In this second example, we've created additional calculated items to show the differences in the values you'll see.

Averages	190.30	355.92	257.29	98.63
Counts	28.00	28.00	28.00	28.00
Sums	5328.27	9,965.72	7,204.00	2,761.72

Training Guide Working with Bins



Viewing or Deleting Calculated Items

Once you've created a calculated item, you may have a need to view the values that are in the item. You might also wish to delete the calculated item you've created.

Procedure to View the Calculated Item Definition

- 1. **Right-click** on the cell that contains the name of the item.
- 2. Select **View Calculated Item Definition** from the menu.

١	view Calculated Item Definition	
	Remove	
	Employee Id	Þ

The system will present a small window displaying the values included in the item you created.

Close the window when you're through.

Procedure #1 to Delete the Calculated Item

Deleting a calculated item will not restore the original rows of data to the analysis if you removed them when you created the item. Deleting simply removes the item.

- 1. Right-click the cell that contains the name of the calculated item.
- 2. Right-click and select Remove from the menu.
- 3. The analysis will refresh itself, having removed the item.

Note: The original rows of data will not be restored.

Procedure #2 to Delete the Calculated Item

This isn't really deleting a calculated item, per se, but this simple procedure surely removes the item from the analysis. It also restores the original rows of data.

- 3. Click the **Page Options** button in the upper-right corner of the dashboard screen.
- 4. Select **Clear My Customization** from the menu.

Note: This will remove all of the changes you've made to the dashboard during this session.

Remember, if you wish to retain your groups for future use, be sure to save your dashboard customization.

