University Analytics
& Institutional Research

UAccess Analytics

Basic Reports & Dashboards

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Record of Changes		
Date	**Version #**	**Description**
04/01/2012	1.00	Original
06/01/2012	1.10	Corrected some capitalization errors
02/21/2013	2.00	Added information to include new features from 2/18/13 software update.
04/24/2014	2.10	Updated information regarding the UAccess Community, and added instructions and references for the Selection Steps view.
10/20/2014	3.00	Completely updated to match the current version of UAccess Analytics.
07/01/2017	4.00	Completely updated to match the latest version of the UAccess Analytics software.
07/01/2018	4.10	Added information about Analytics Office Hours
08/01/2019	4.20	Added the cover graphic and updated the branding to UAIR.

Table of Contents

About this Workshop

This workshop introduces attendees to UAccess Analytics, the University's report and dashboard creating tool.

This is a basic hands-on session, appropriate for people who will be creating ad hoc analyses (reports) and basic dashboards (collections of reports on a single web page) in Analytics.

For information on additional workshops or materials with which you can further your knowledge of UAccess Analytics, 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 uses UAccess Systems.

If you have an official UA email address, you can become a member of the UAccess Community. Open a browser and go to the UAccess Community at **http://community.uaccess.arizona.edu/** to begin.

As a member, 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 Forums within the Community, because that's where the value comes in.

Be sure to browse through the different Forums, check out upcoming Events, and peruse the extensive Resources provided through the Community. Refer to the FAQs page on the Community for more information.

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.

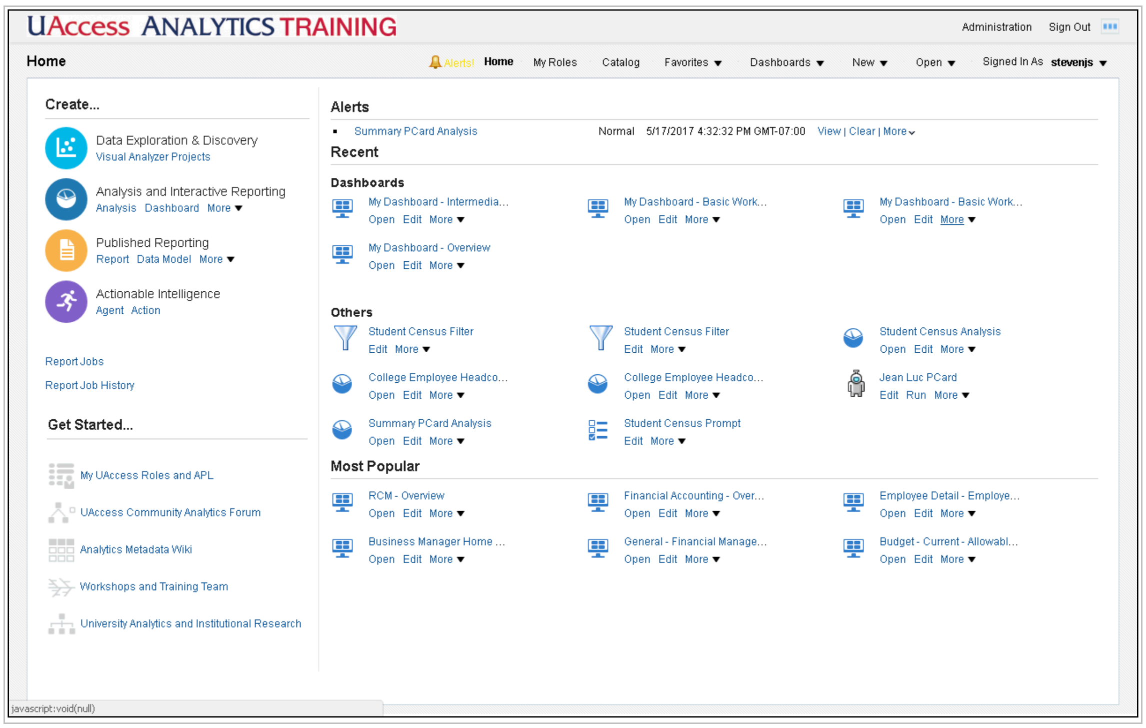
Basic Reports and Dashboards

Getting Around in Analytics

Working with the Home Page

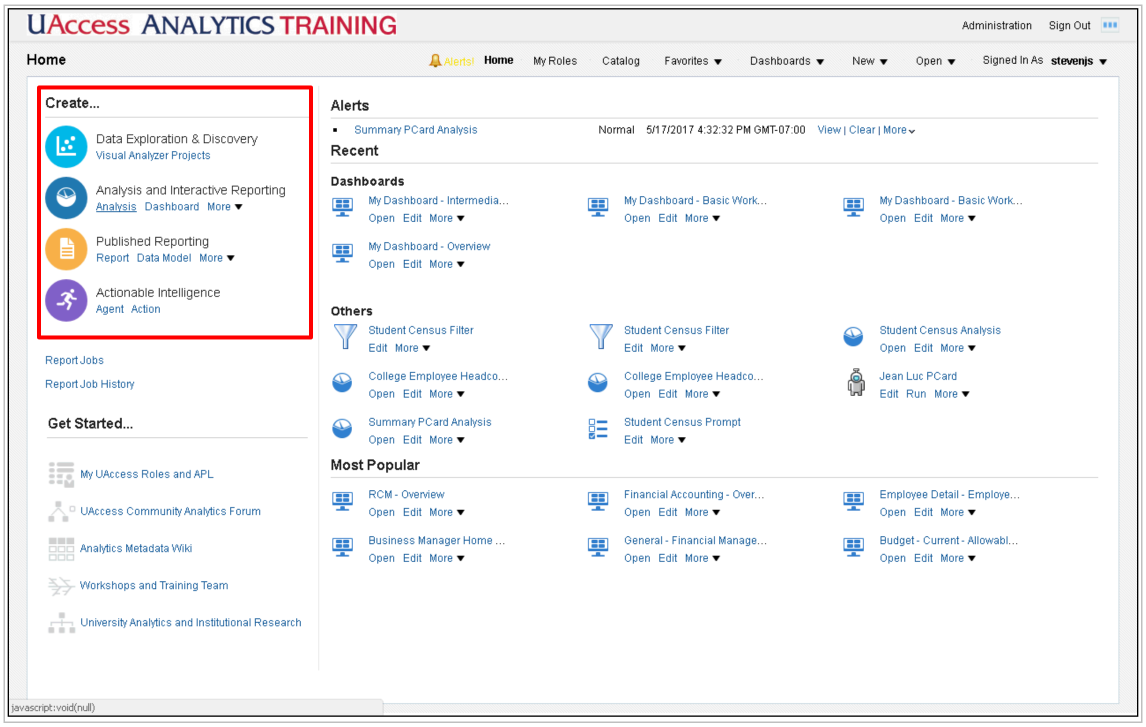
Procedure

The Home page is the first screen you land on when you log into UAccess Analytics.

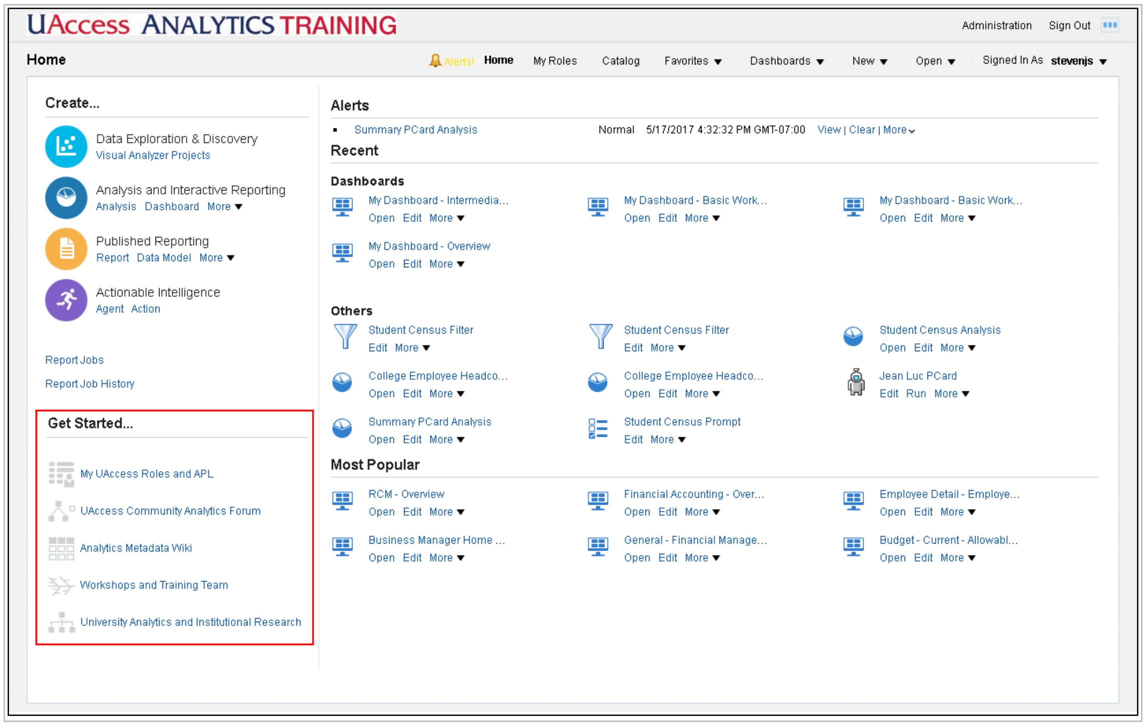


Step	Action
1.	The bottom area of the screen is the UAccess Analytics Home page. The light gray bars across the top of the screen are called the Global Header. We'll look at that in a moment. Both of these items are simply navigation tools. Let's look at the Home page.
2.	The Home page is divided into different sections, each of which has a different purpose. The **Create** section contains links which let you start building different Analytics items. To get started, just click the appropriate link.

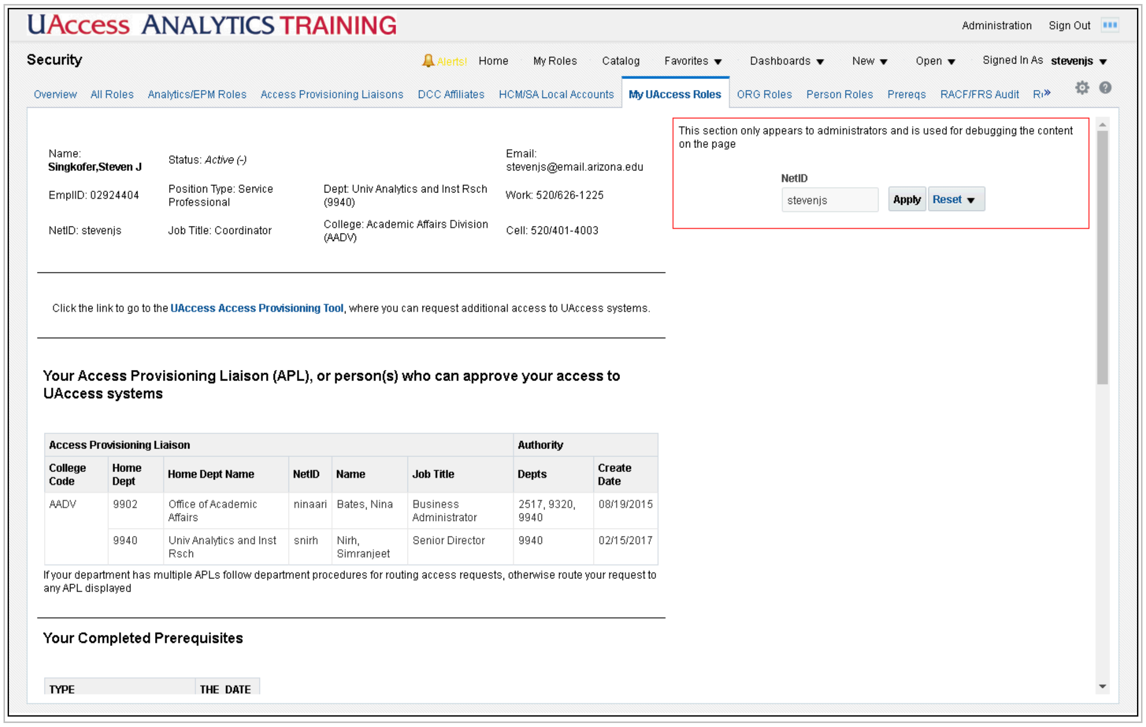
Step	Action
3.	In this case, you're creating an analysis. *Analysis* is the term used throughout Analytics for what you might call a report or a query. Click the **Analysis** link. Analysis



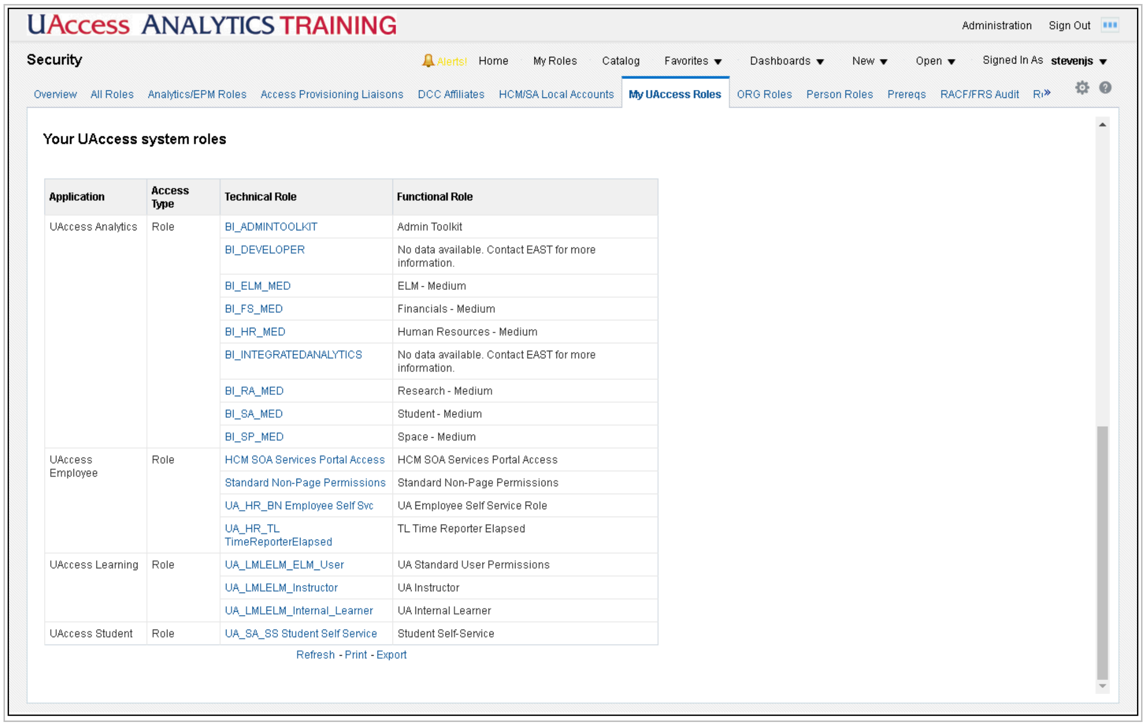
Step	Action
4.	Once you click a link in the **Create** section, Analytics either takes you to another screen or, more often, simply open a pop-up window in which you can select a **Subject Area** for your analysis or other item. Click the **Analysis** link. Analysis
5.	There are dozens and dozens of subject areas. Press the **ESC** key on your keyboard to close the popup window. Press **[Escape]**.



Step	Action
6.	The **Get Started** section contains links to show you the roles you've been assigned and a website through which you can request different access, and the Analytics Metadata Wiki. There are also links to the Analytics Forum on the UAccess Community, the Workshops and Training Team website, and the Analytics team. They're the people who control the data behind the scenes.
7.	Click the **My UAccess Roles and APL** link. My UAccess Roles and APL

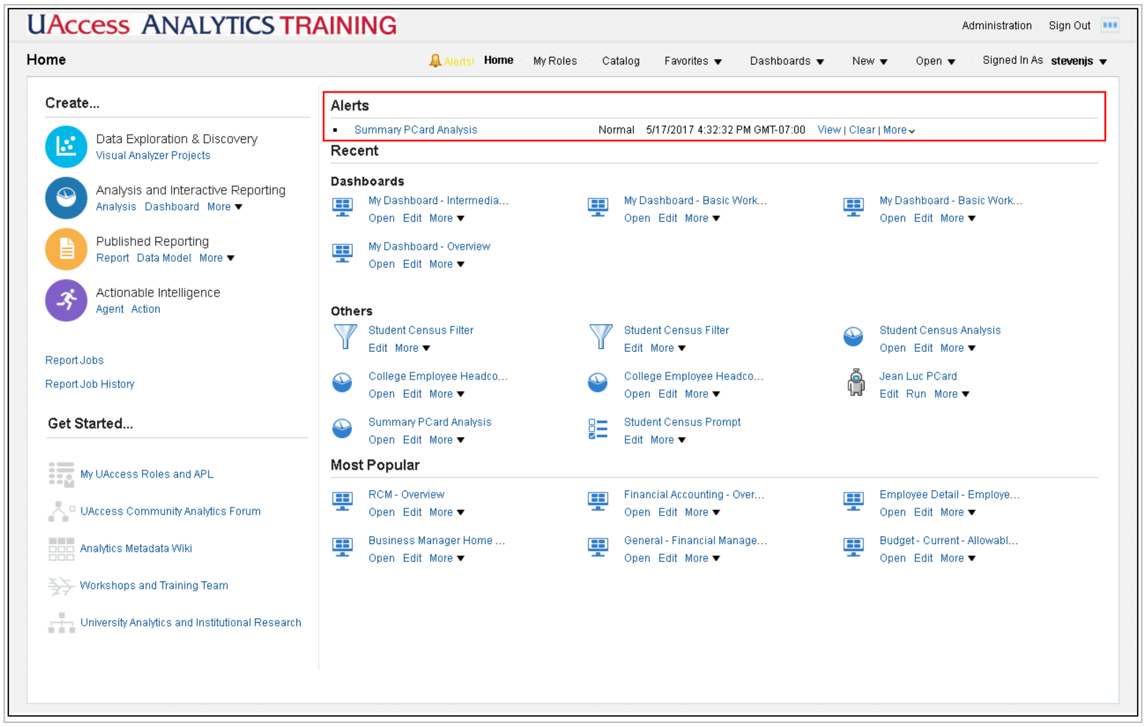


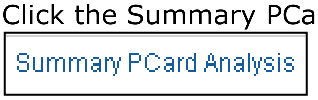
Step	Action
8.	This is the **Security > Security > My UAccess Roles** dashboard. This dashboard shows you a lot of security-related information about yourself and your job. Further down on the dashboard is an analysis that shows you the roles you've been assigned in Analytics. Click the scrollbar.

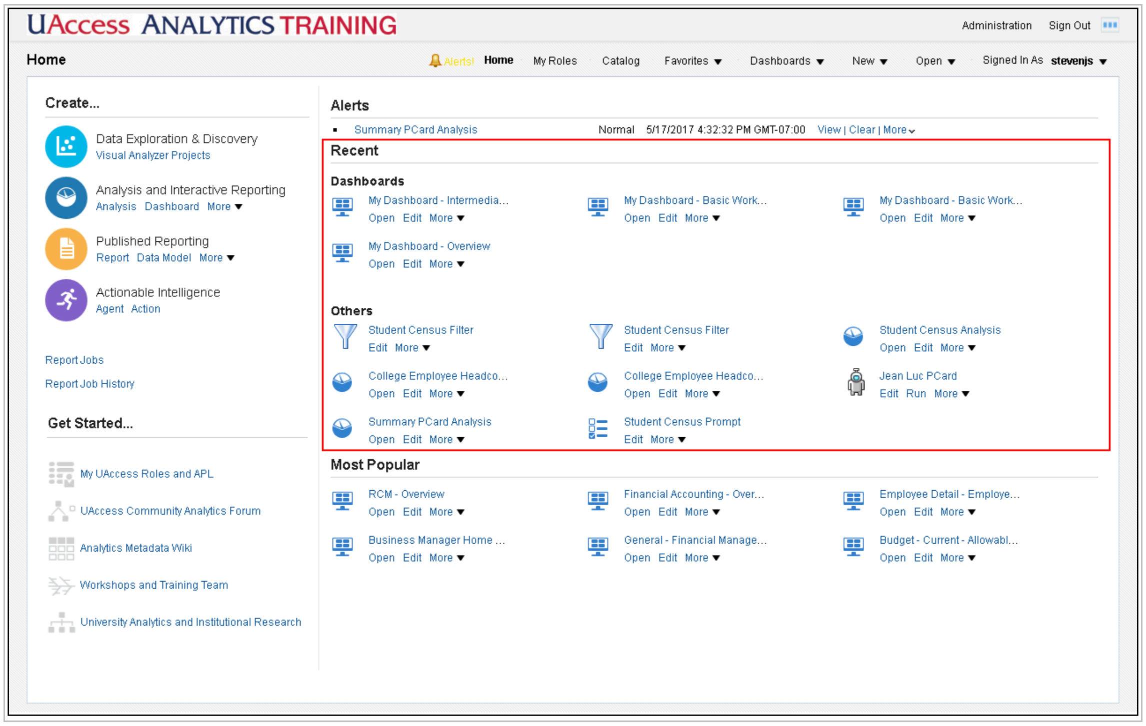


Application	Access Type	Technical Role	Functional Role
UAccess Analytics	Role	BI_ADMINTOOLKIT	Admin Toolkit
		BI_DEVELOPER	No data available. Contact EAST for more information.
		BI_ELM_MED	ELM - Medium
		BI_FS_MED	Financials - Medium
		BI_HR_MED	Human Resources - Medium
		BI_INTEGRATEDANALYTICS	No data available. Contact EAST for more information.
		BI_RA_MED	Research - Medium
		BI_SA_MED	Student - Medium
		BI_SP_MED	Space - Medium
UAccess Employee	Role	HCM SOA Services Portal Access	HCM SOA Services Portal Access
		Standard Non-Page Permissions	Standard Non-Page Permissions
		UA_HR_BN Employee Self Svc	UA Employee Self Service Role
		UA_HR_TL TimeReporterElapsed	TL Time Reporter Elapsed
UAccess Learning	Role	UA_LMLELM_ELM_User	UA Standard User Permissions
		UA_LMLELM_Instructor	UA Instructor
		UA_LMLELM_Internal_Learner	UA Internal Learner
UAccess Student	Role	UA_SA_SS Student Self Service	Student Self-Service

Step	Action
9.	The **Your UAccess System Roles** analysis lists the roles you've been assigned in UAccess Analytics, as well as those you've been assigned in any other UAccess system. Some of the typical roles you'll see will be BI_FS_MED, BI_HR_MED, BI_RA_MED, and BI_SA_MED. You're assigned roles by request, but only if your supervisor approves the request, and only if your job requires you to have the role. Close the current browser tab to return to the Home page.



Step	Action
10.	The bulk of the Home page is taken up with two, or sometimes three, additional sections. You *may* see an **Alerts** section. You only see this section, however, if you've created an Agent, and then only if that agent has been triggered and has delivered information to you.
11.	Click the link to view the information that the agent delivered to you. Click the Summary PCard Analysis link. 
12.	This analysis was delivered to the Home page, but could also have been delivered via email. **Note**: *Agents are not covered in this workshop, but are covered in the* UAccess Analytics: Intermediate Reports and Dashboards *workshop or tutorial.* Click the OK button. 

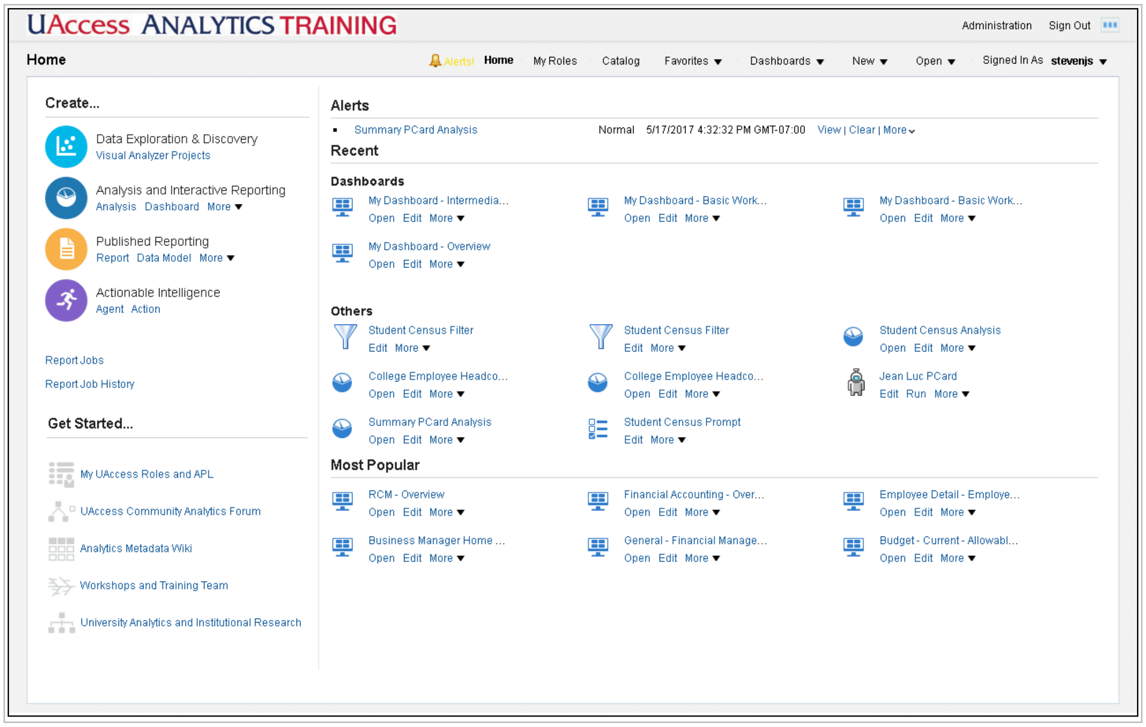


Step	Action
13.	The **Recent** section displays up to six different dashboards you've recently accessed, and as many as nine other items you've opened. Click the appropriate link to navigate directly to the dashboard or other item.
14.	The **Most Popular** section displays six different dashboards that other Analytics users have been using most. ***Note:*** *You will only see those items to which you've been granted access.*
15.	That's it for the features of the Home page. **End of Procedure.**

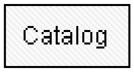
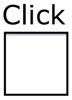
Working with the Global Header

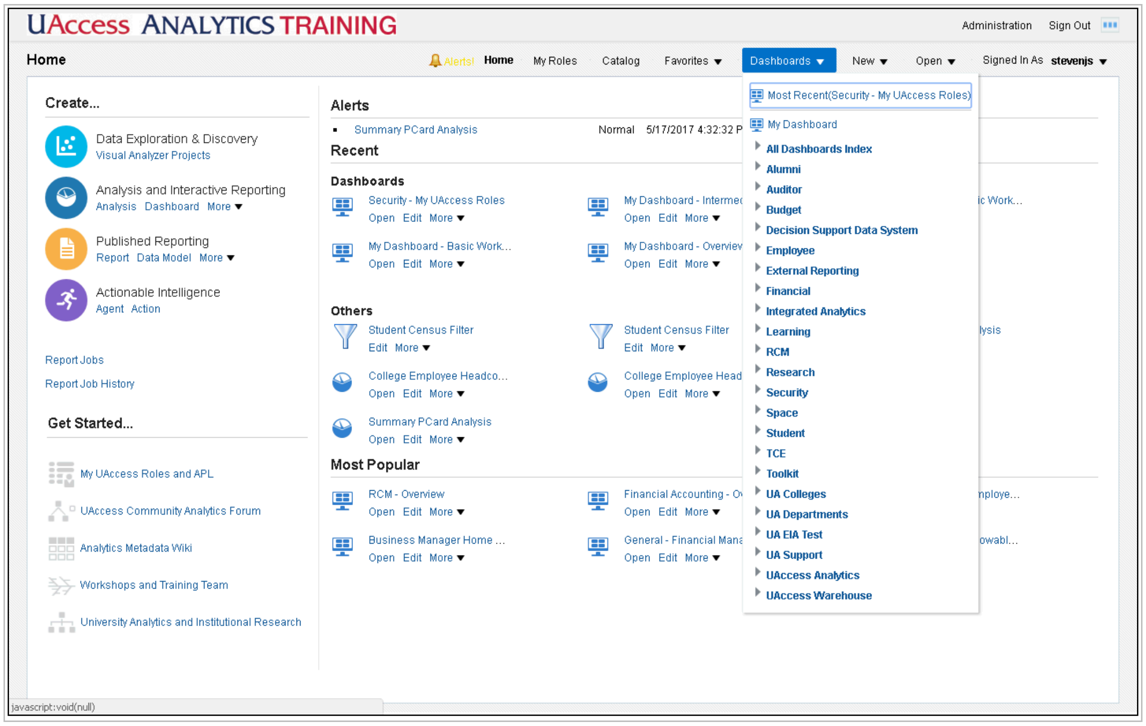
Procedure

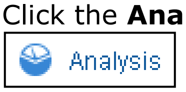
The Global Header is another great navigation tool available in UAccess Analytics.



Step	Action
1.	The Global Header - the light gray bars across the top of the screen - is present on all screens in UAccess Analytics. The Global Header allows you to navigate within the application from whatever screen you happen to be on.
2.	The links on the Global Header correspond to different areas and functions of the Home page. The **Alerts!** link is available because the Alerts section is open on the Home page. Clicking that link would show you the report the agent delivered.
3.	The **Home** link returns you to the Home page from any other screen.
4.	The **My Roles** link takes you to the same dashboard as the **My UAccess Roles and APL** link in the Getting Started area of the Home page.

Step	Action
5.	The **Catalog** link takes you to Analytics' built-in file management tool. Click the **Catalog** link. 
6.	You're now in the Catalog, as expected. Here you can work with folders, rename analyses, open or edit reports, etc. Notice that the Global Header looks the same here as it did from the Home page.
7.	Go back to the **Home** page. Click the **Home** link. 
8.	The **Favorites** link is your access point to a menu structure you can create for yourself. Click the **Favorites** link. 
9.	If you wish to add a dashboard or other item to the Favorites menu, simply navigate to that item, the click **Favorites > Add to Favorites**. Click away from the Favorites menu to close it. Click the **Home** pane. 
10.	Click the **Dashboards** link. 



Step	Action
11.	The **Dashboards** menu is your access point to all of the dashboards your roles allow you to see. If you've been granted access to Financial data, for example, you'll see the **Financial** link. If not, you won't.
12.	Click the **Financial** link. 
13.	There are dozens and dozens of dashboards available, and hundreds of different dashboard pages.
14.	When you need to create a new analysis, you can simply click the **New** link on the Global Header, no matter where you are in the Analytics system. Click the **New** link. 
15.	You'll see a list of the same items that are available in the **Create** section of the **Home** page. Click the **Analysis** link. 
16.	You'll see the same list of **Subject Areas**, too.

Step	Action
17.	The **Open** menu is one path by which you can open an analysis or other saved item. The Open menu itself has a Recent section, via which you can access any of the six most recently accessed items. Click the **Open** link. 
18.	That's it for the Global Header. Remember that it's available everywhere in Analytics and allows you to quickly navigate to any other part of the system. **End of Procedure.**

Review - Home Page and Global Header

Answer the following:

1. When logging in to UAccess Analytics, users will typically land on the ________________________.
2. On the Home page, users can see as many as ___________ dashboards they've previously accessed.
3. You can get to Analytics' built-in file manager by clicking ______________ on the Global Header.
4. To set up faster access to a specific dashboard, you can navigate to that item and add a link to it on the _________________ menu.
5. When you need to create a new analysis, you can click the __________________ link on the Global Header.
6. To find a list of the roles you've been assigned, you can click on __________________________.
7. I can ask for help by posting a question on the Analytics Forum on the ________________________________.

Working with Analyses

Analytics Data

Where does the data in UAccess Analytics come from?

- The information available in UAccess Analytics originates in the other UAccess systems -- UAccess Employee, UAccess Financials, UAccess Learning, UAccess Research, UAccess Space, and UAccess Student. Sometimes these different systems are referred to as *transaction systems*.
- The data in those systems is pulled out each night through a process called ETL, which stands for extract, transform, and load. The data is *extracted* from the systems, *transformed* so it works properly in UAccess Analytics, and *loaded* into the data warehouse in the form of Subject Areas. Those subject areas provide the first point of contact with the data in Analytics.
- With just a few exceptions, the data in Analytics is current as of the end of the previous business day.
    - A few subject areas contain live data, being fed directly from the transaction system, e.g., HCM - Workforce - Time & Labor - Reported Time - Live or CSW - LIVE - Class Enrollment.
    - A few subject areas are refreshed only at specific times of the month, term, or semester, e.g., CSW - Student Profile - Census or KFS - Capital Management Asset Snapshot.

How is the data organized within UAccess Analytics?

- The data is organized into **Subject Areas.**
- There are five main areas of data in the Subject Areas list.
    - The first is **Student** data, denoted by subject area names that begin with the letters **CSW**. The letters are an acronym for Campus Solutions Warehouse, but it's more helpful to think that the "S" stands for Student.
    - Next is **Employee** data, and the subject area names begin with **HCM**, which means Human Capital Management.
    - Some subject areas have an **IA** prefix, meaning **Integrated Analytics**. These subject areas pull data from multiple data types and tables in the Data Warehouse. They can combine HCM and KC data, for instance, or CSW and KFS data.
    - Following that is **Research** data, and the subject areas begin with the letters **KC**, for Kuali Coeus.
    - Finally, we have **Financial** data in the subject areas that begin with **KFS**, for Kuali Financial Services.
    - You may also have access to other subject areas with different acronyms.
- Subject Areas contain many **tables** or **folders** of data.
- Each table contains many **columns** of data.
    - There are two types of data: **attributes** or **dimensions** and **measures** or **facts**. Attributes/dimensions are those values that don't often change and can be thought of as static. Some examples are Student Name, Account Number, College Code, Proposal Title, etc. Measures/facts can change every day, although many do

not. Measures/facts are just inherently changeable. Examples are Ledger Entry Amount, Term GPA, Base Salary Amount, etc.
  - Some columns in Analytics appear because someone created that column; i.e., calculated columns (e.g., averages, counts, sums).
  - Most columns in Analytics appear because a field exists in the source software. There is a direct correlation between the data that's entered in the transaction system and the data that appears in Analytics.
- Columns within tables may be organized **alphabetically** or by subjective **importance**; the organization of the columns varies with the table.

What are some examples of the different types of data in available in UAccess Analytics?

- Tables very often contain **three versions** of many columns, e.g.,
  - Position Code (or ID) – a one-, two-, or three-character alphanumeric code or abbreviation.
  - Position – an shorter form of the Description column (10 char).
  - Position Desc – a longer description of the column's information (30 char).
- Sometimes there are just **two versions** of columns, e.g.,
  - ABOR Code (or ID) – a one-, two-, or three-character alphanumeric code or abbreviation.
  - ABOR Code Description – a longer description of the column's information (30 char).

The particular version of any data column you might add to your analysis depends on your understanding of the data, or the understanding of those for whom the analysis is intended. If the analysis users won't understand the code version of the data, you should use either the short-form description column or the long-form description column.

What are Indicators and Flags?

- Indicators and Flags are **Y** or **N** columns, e.g., Disabled Veteran Flag, Works with Animals Flag, or Current Indicator are all Y/N columns. If the Y/N answer to the implied question is not known, those columns may display a dash (-).

What about those Date Tables?

- Date tables for important dates contain many versions of date data.
- The date column you'll most likely want will be the **Day Date** column, which is typically the top data column in the date table.

Where do I find Numeric Data?

- All of the numeric data in any selected subject area is available in the **Fact** or **Measures** table in that subject area. The name of this table, usually the top-most table in any subject area, will always contain some variation of the word **Fact** or the word **Measure**.

- In the Fact or Measures table, you will likely see two differently colored icons. The **yellow icons represent measures**, and the **blue icons represent facts**. The distinction depends on the level of the data structure at which any calculations were performed to arrive at the values available. It's more important to understand that all of the values of all the data columns in the Fact or Measures table, regardless of icon color, are numeric values.
- Occasionally, in some specific subject areas, you will find numeric data in tables other than the Fact or Measures table, but this is atypical.

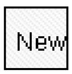
What is contained in those "Additional" Data Tables?

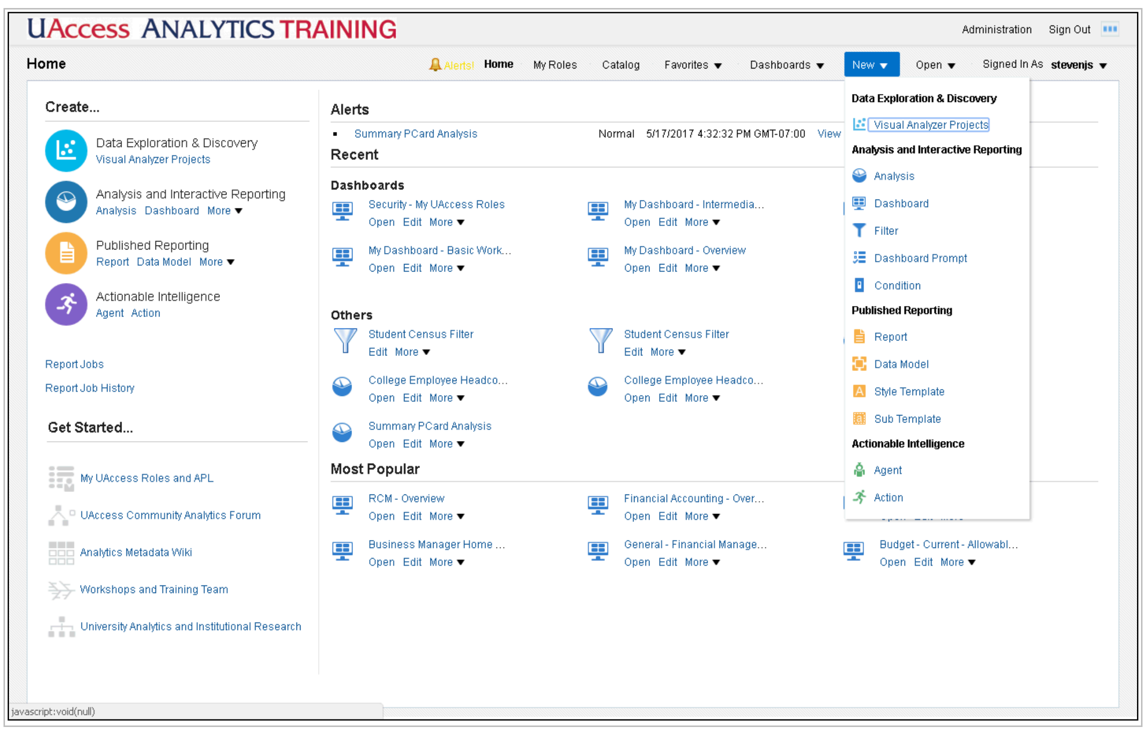
- Some table names begin with the word "Additional." Those tables contain variations of data columns that exist in other tables, e.g., Alternate Employee ID, or Home Address 4, and may also contain columns of information that are not likely to be used, e.g., Military Compensation Code, or Congruent Address Indicator.

Creating a New Analysis

Procedure

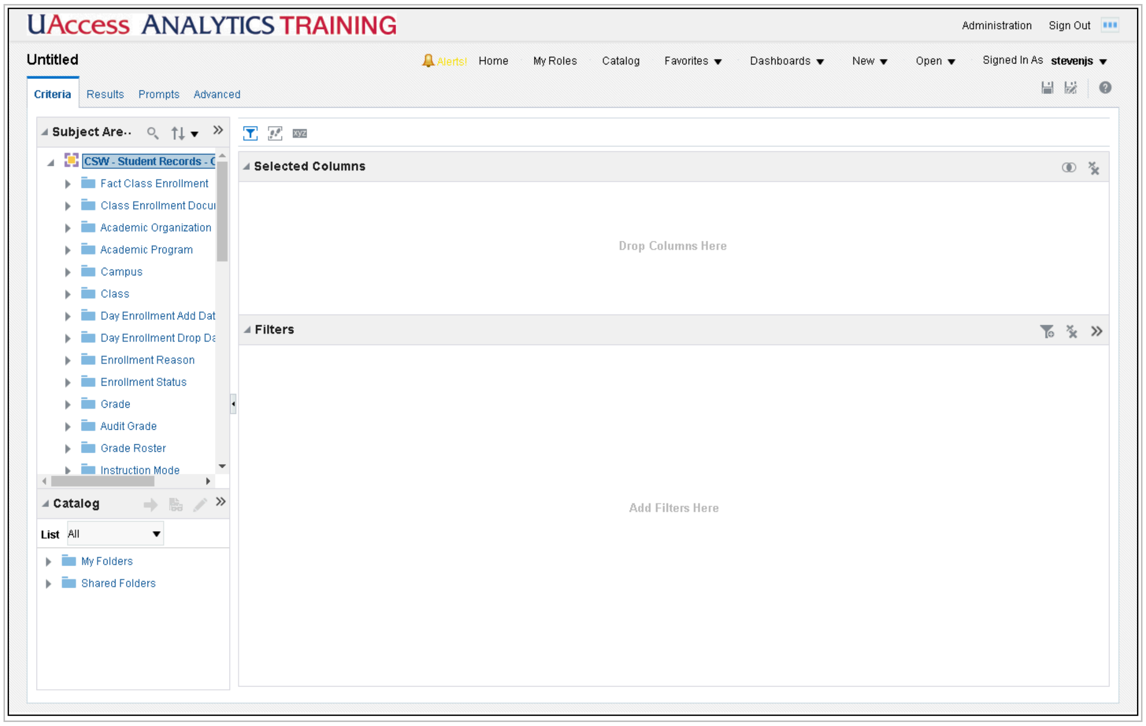
The process of creating a new analysis is fairly straightforward, provided you start with some sort of plan for that analysis.

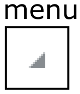
Step	Action
1.	In this example, the basic plan is to create an analysis that will show you the trends in student enrollment numbers in a particular college, broken down by major, for some period of time. With that basic plan in mind, you can begin to create the analysis. Click the **New** link. 

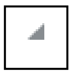
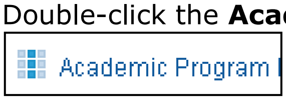


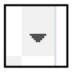
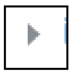
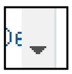
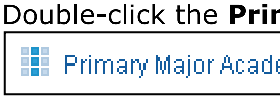
Step	Action
2.	A drop-down list appears. Since you're creating a new analysis, you could click the **Analysis** link on that menu.

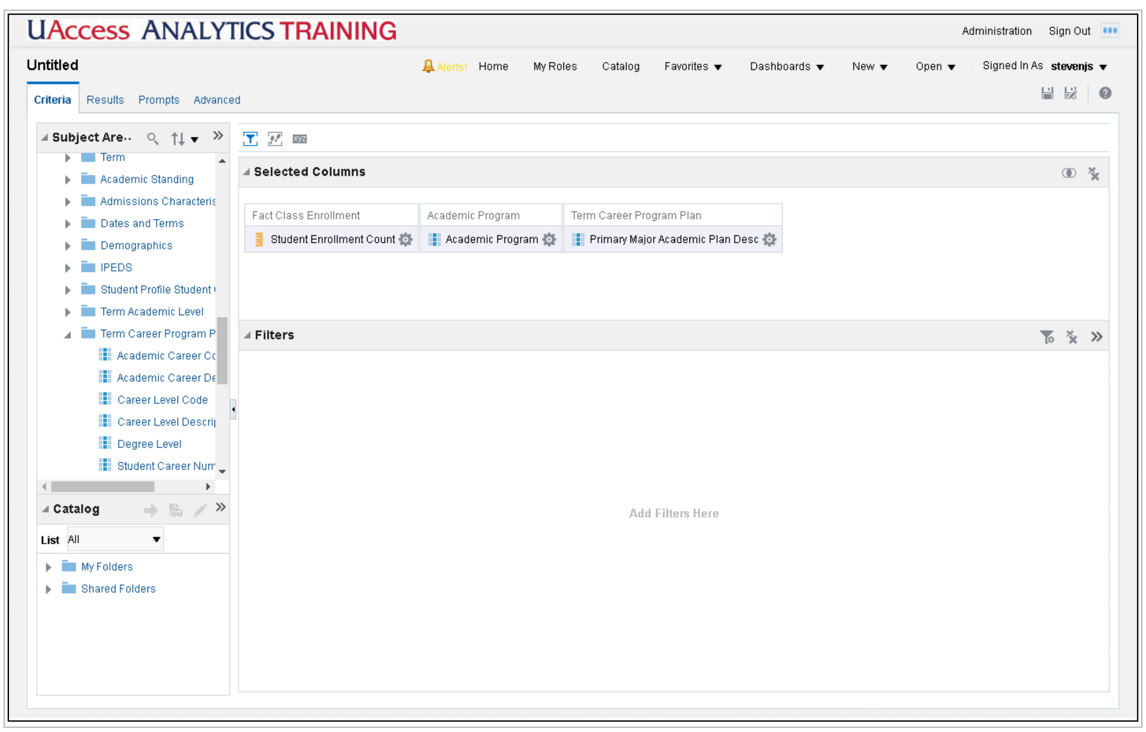
Step	Action
3.	Click the **Analysis** link. Analysis
4.	Alternatively, if you happen to be on the **Home** page, you could click the **Analysis** link in the **Create** section. Whichever path you choose, you will get a pop-up screen listing all of the available subject areas. Click the **Analysis** link. Analysis
5.	Scroll through the subject areas screen to locate the subject area you need for your analysis. Remember that you're trying to create an analysis that will show you the trends in student enrollment numbers in a particular college, broken down by major, for some period of time. Click the **Down** button of the scrollbar.
6.	Since you're going to create an analysis showing you the trend in student enrollment, it makes sense to select a subject area designed around that topic. Click the **CSW - Student Records - Class Enrollment** list item. CSW - Student Records - Class Enrollment

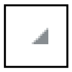
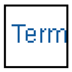


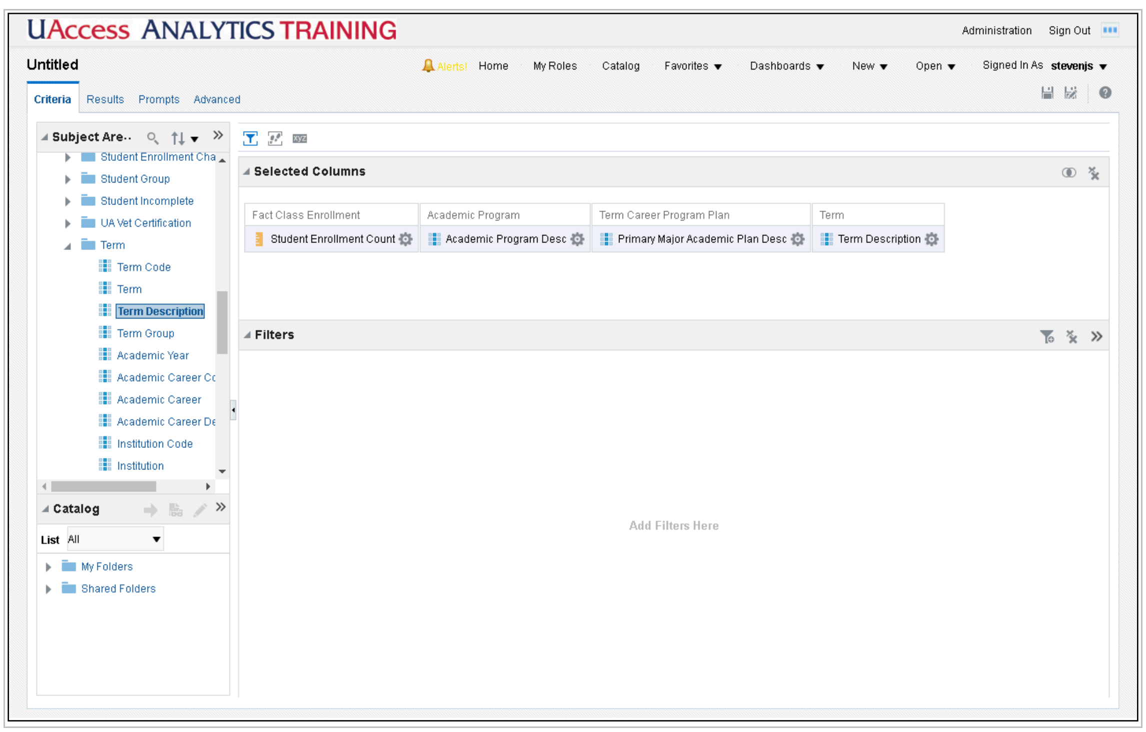
Step	Action
7.	You are now in analysis-building mode. Note the tabs in the upper-left corner of the screen. You are working on an Untitled analysis, and the process of creating the analysis always begins on the Criteria tab.
8.	The first data column we want is the column that will tell us the number of students enrolled. As you learned earlier, all of the numeric columns are typically contained in the **Fact** or **Measures** table. ***Note:*** *Refer to the Analytics Data discussion to learn how data is organized within UAccess Analytics. For additional information on sorting and organizing the subject area contents, refer to the* ***Basics: Using Column Search and Table Sort Order*** *document on the UAccess Community.* Click the **Fact Class Enrollment** dropdown button to activate the menu. 

Step	Action
9.	Which data column should you select to show how many students are enrolled? ***Note:*** *the Student Enrollment Count column is a Measures column, represented by a yellow icon. This bit of information will have some relevance later in the workshop.* Double-click the **Student Enrollment Count** list item. 
10.	Collapse the menu. Click the **Fact Class Enrollment** dropdown triangle. 
11.	The Student Enrollment Count data column has been added to the Selected Columns area of your new analysis.
12.	Please note that the data column in the Selected Columns pane has a top section and a bottom section. The top section lists the name of the table from which the column was added. The bottom section is the name of the data column. This data column as called **Student Enrollment Count**, *not* Fact Class Enrollment.
13.	The next data column you need will give you the name of your college. Click the **Academic Program** dropdown button to activate the menu. 
14.	Add the description version of the Academic Program data column to the analysis. Double-click the **Academic Program Desc** list item. 
15.	Collapse the menu tree. Click the **Academic Program** dropdown triangle. 

Step	Action
16.	The third data column comes from a table near the bottom of the tables list in this subject area. Click the **Down** button of the scrollbar. 
17.	You need to break out the student enrollment data by the students' primary major. A major is also called a plan. Click the **Term Career Program Plan** dropdown button to activate the menu. 
18.	Scroll down again. Click the **Down** button of the scrollbar. 
19.	Be sure you select the primary major, not the primary minor. Double-click the **Primary Major Academic Plan Desc** list item. 

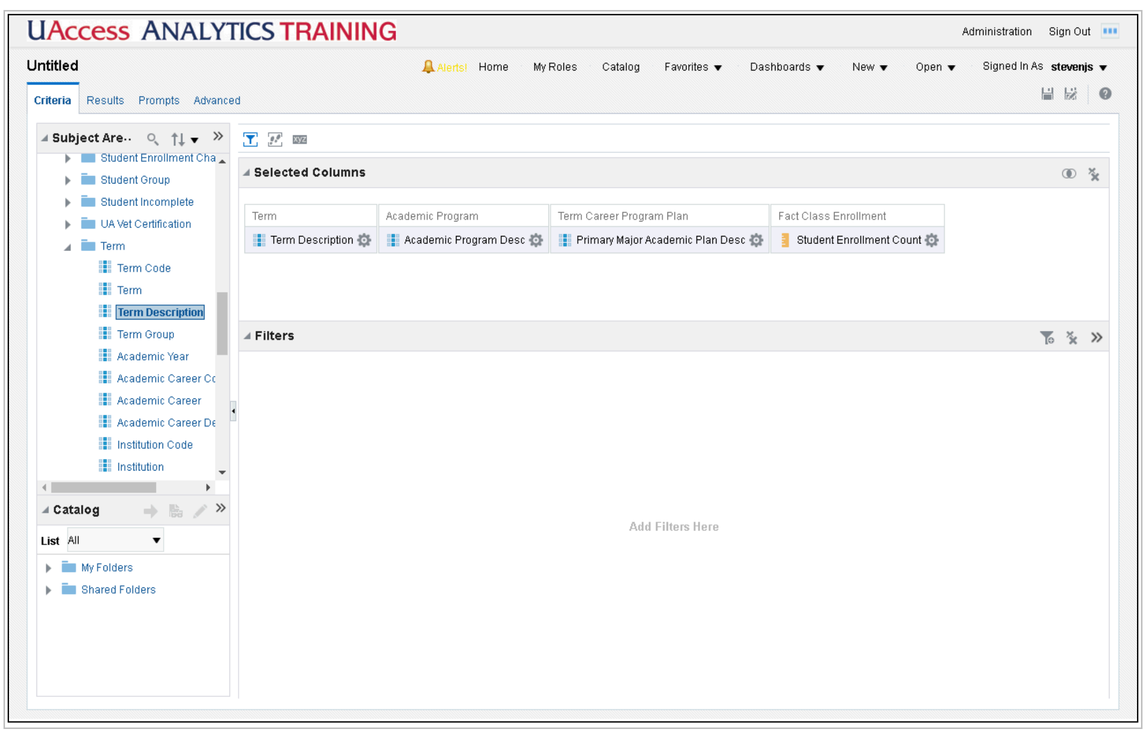


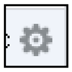
Step	Action
20.	You've got three data columns added to your new analysis. You can collapse the Term Career Program Plan menu. Click the **Term Career Program Plan** dropdown triangle. 
21.	You can expand a table by double-clicking the name of the table, rather than clicking the little arrow button. Double-click the **Term** drop-down list. 
22.	You need a way to denote time, as it relates to student data. Double-click the **Term Description** list item. 

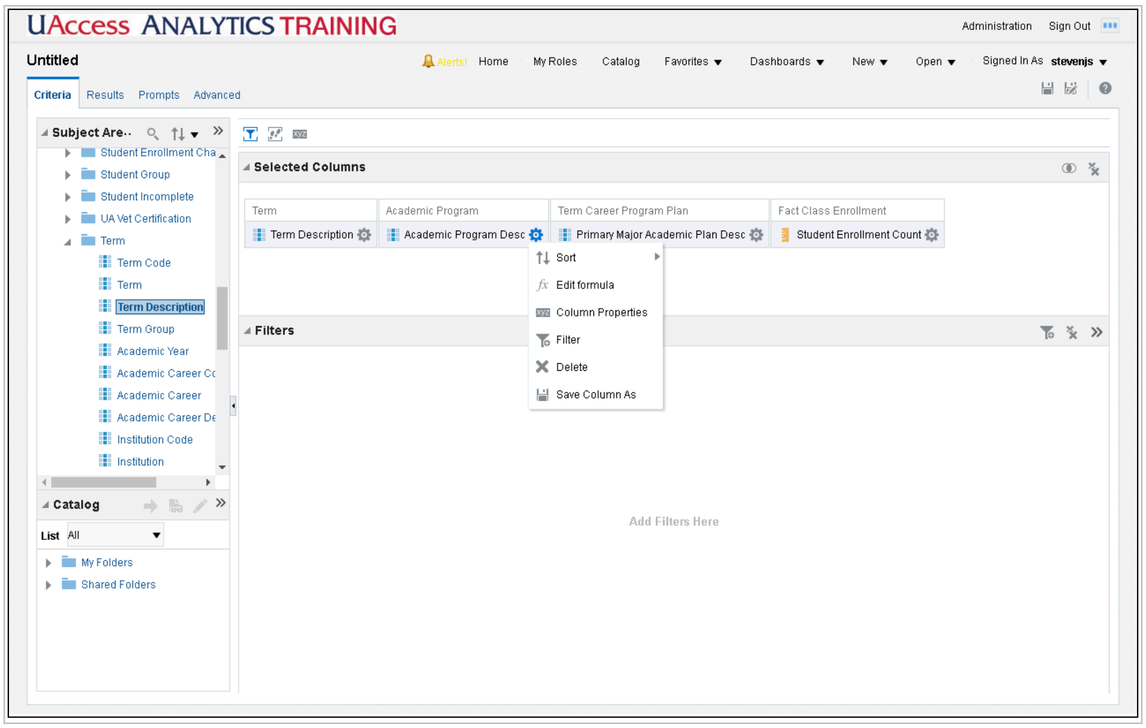


Step	Action
23.	You've just created your first analysis. Congratulations!

Step	Action
24.	Very often, data columns are arranged so that the data column on the far left contains the broadest category of information and the data column on the far right contains that narrowest category of information. Which data column, in your opinion, contains the broadest category of information?
25.	The **Term Description** data column contains the broadest category of data among the four data columns you have in the analysis. Drag that data column over to the far left of the analysis. Watch for the gray bar so you'll know when to drop the data column. Release the mouse button.
26.	The **Student Enrollment Count** column contains the narrowest category of information. Drag that data column to the far right of the analysis. Once again, watch for the gray bar so you'll know when to drop the data column. Release the mouse button.



Step	Action
27.	Besides changing the horizontal arrangement of the data columns, you can also change some of the ways in which they function. Each data column comes with an **Options** button. It looks like a gear. Click the **Options** button. 



Step	Action
28.	The menu is the same, regardless of which data column you select. Using this menu, you can choose to sort data in some fashion, edit a formula, change column properties, filter data, delete the data column, or save the column in some fashion. Press **[Escape]**.
29.	You've added the data columns you need, and rearranged them to put them in a logical order. Now you should create a filter for the analysis. **End of Procedure.**

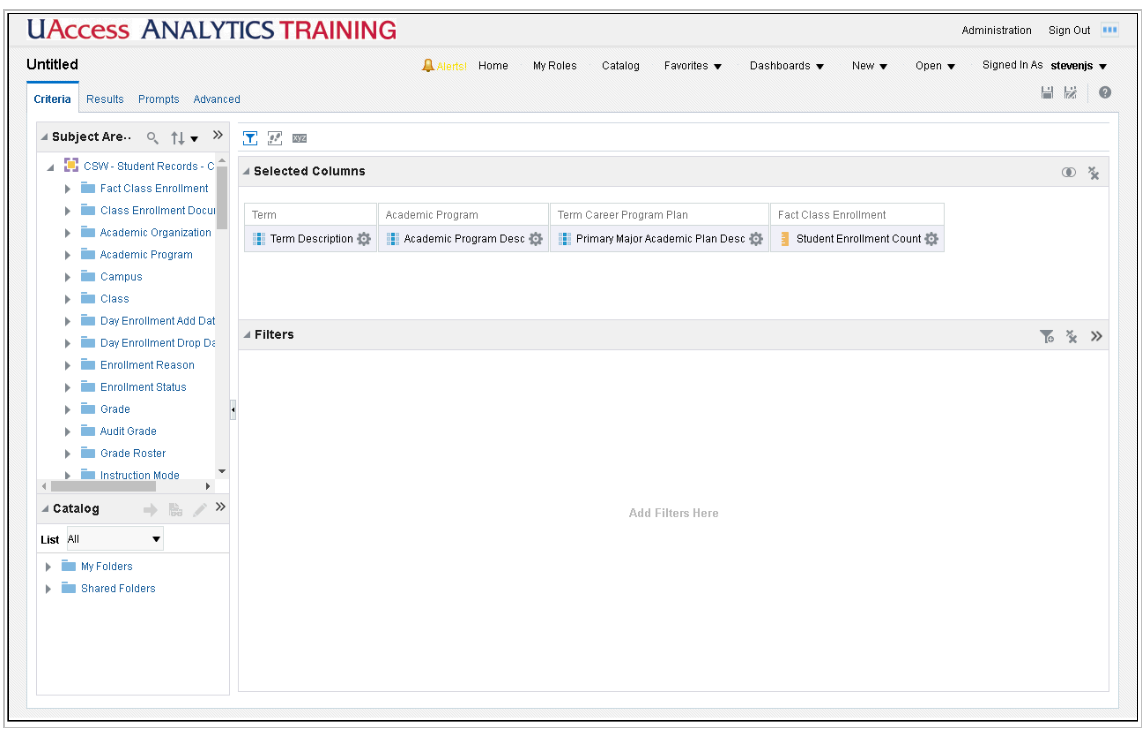
Filtering an Analysis

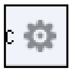
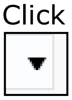
Procedure

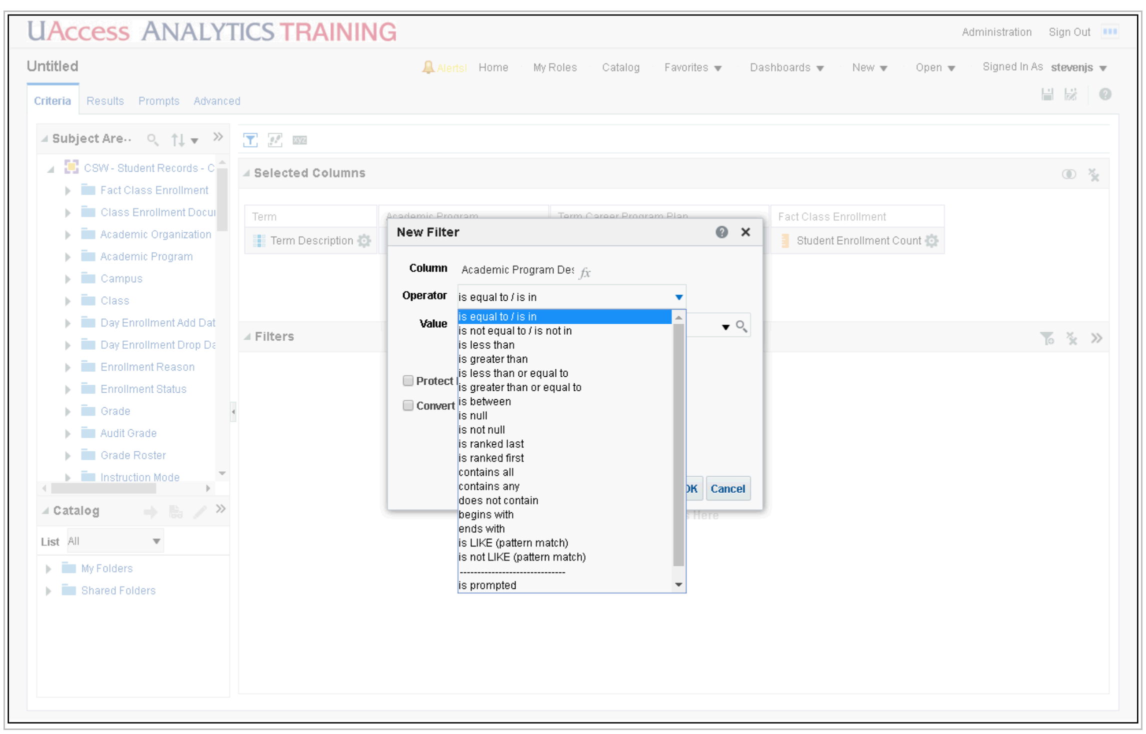
You've started the process of creating an analysis by adding data columns. You've also arranged them into a logical order.

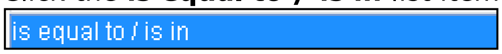
The next step is to filter the data coming into the analysis so that you get just the information you need.

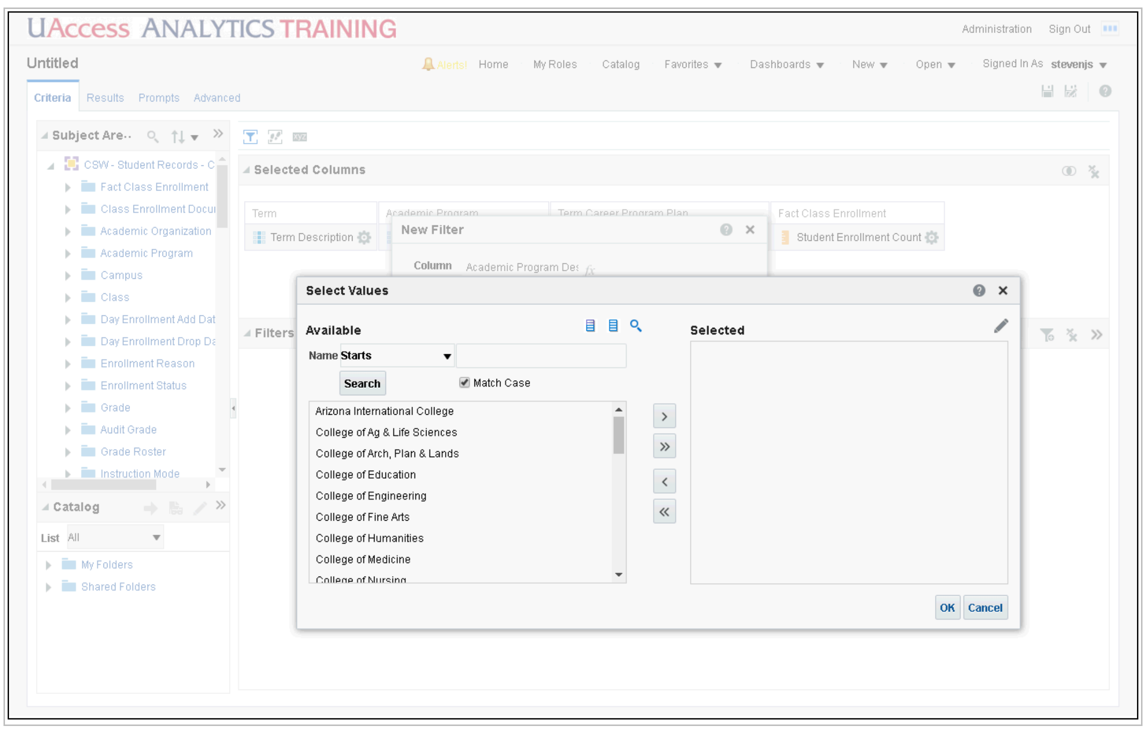
Step	Action
1.	You've added all of the required data columns to your new analysis, and you've arranged them in the correct order from left to right. If you were to run the analysis right now, what data would you get in your report? For what time frame? For what colleges?
2.	In this analysis, you need to limit the data to students enrolled in a particular college. Do you have a column of data in your analysis that will help you create that filter?



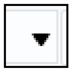
Step	Action
3.	You will use the **Academic Program Description** data column as the basis for your first filter. Click the **Options** button. 
4.	Some people refer to the Filter button icon as a "martini glass" or "margarita glass." That might help you remember where to find that button. Click the **Filter** list item. 
5.	Three elements are required to create a filter: 1) You need a **Column** of data, which you've already selected. 2) You need to select an **Operator**. 3) You need at least one **Value**.
6.	Which operator will work best if you want to limit the data to just those students enrolled in one particular college? Click the **Operator** dropdown button to activate the menu. 

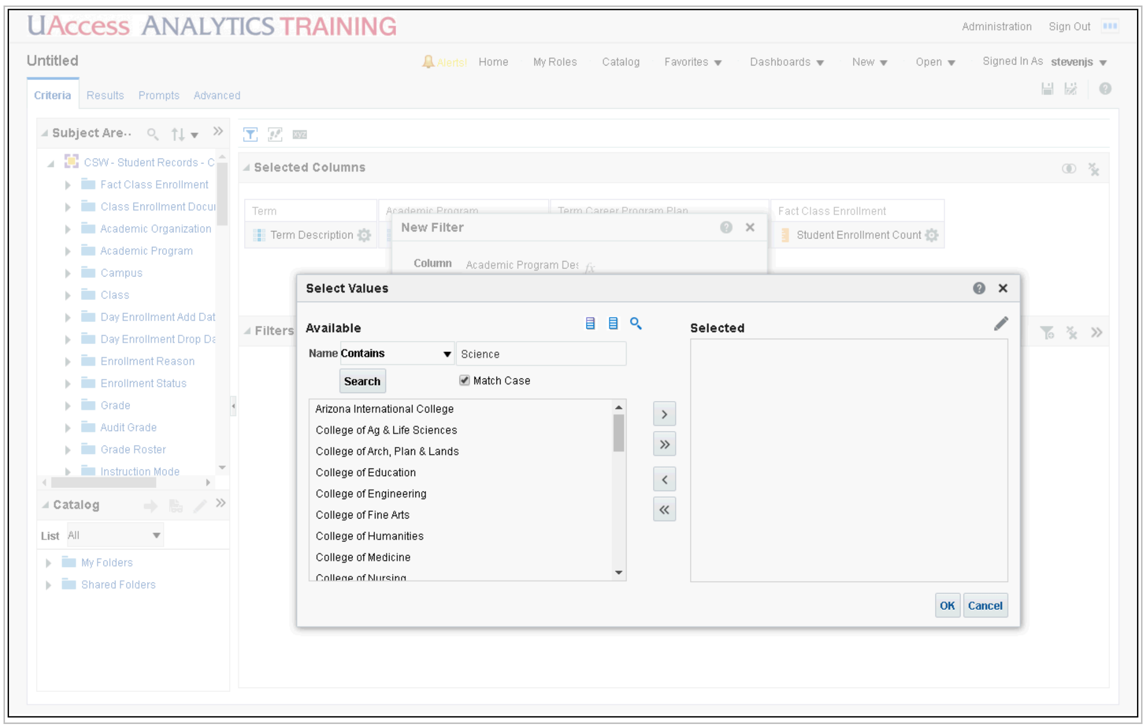


Step	Action
7.	Although there are typically several different ways to create nearly any filter, there is always one way that is more direct than any other way. In this case, the default operator is your best choice. Click the **is equal to / is in** list item. 
8.	You could type a value into the **Value** field, but it's usually safer and more effective to select your value(s) from the provided list. Click the **Search** magnifying glass. 

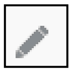


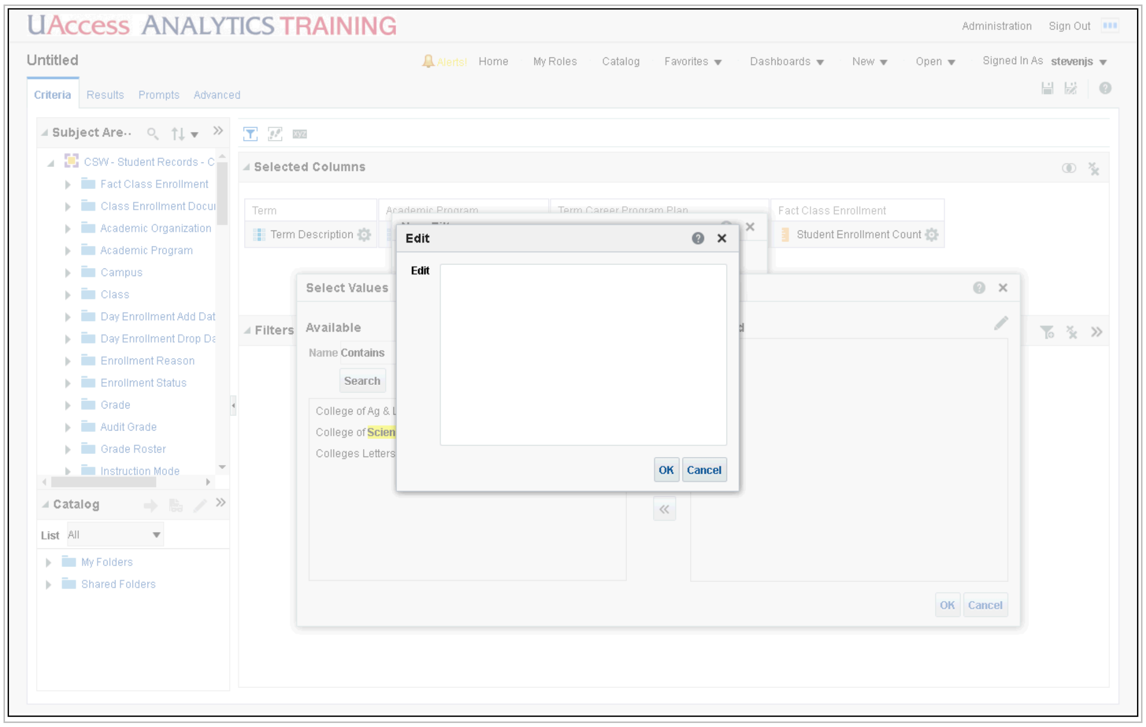
Step	Action
9.	The **Select Values** screen includes a **Search** function, and the **Selected** pane on the right can be manually edited.

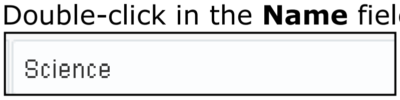
Step	Action
10.	You can search for values that start or end with some character string, that contain something, or that are like something. Click the **Name** dropdown button to activate the menu. 
11.	Click the **Contains** list item. Contains
12.	Enter "**Science**" in the **Name** field.

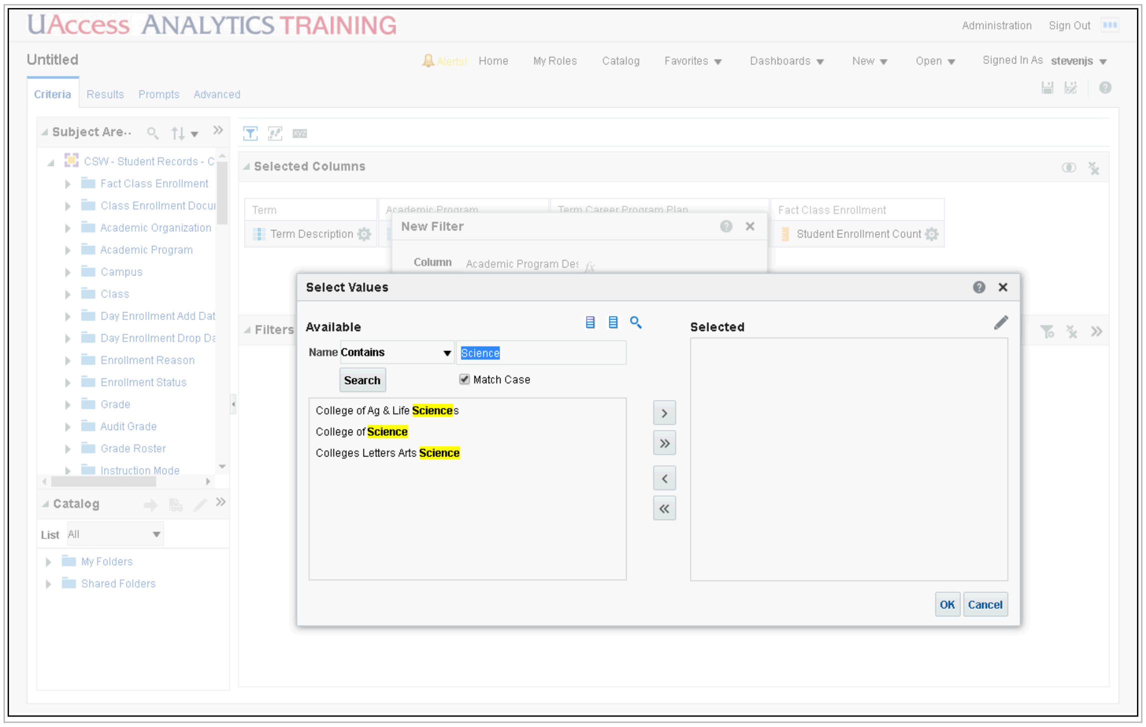


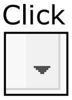
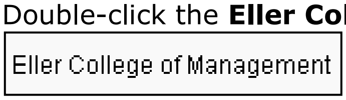
Step	Action
13.	Most items you search for are case-sensitive. Check or uncheck the **Match Case** checkbox, as necessary. Click the **Search** button. Search
14.	The system has located the three values that contain the word "Science." You could use the buttons in the center of the screen to move any or all of those values from the Available pane to the Selected pane or back.

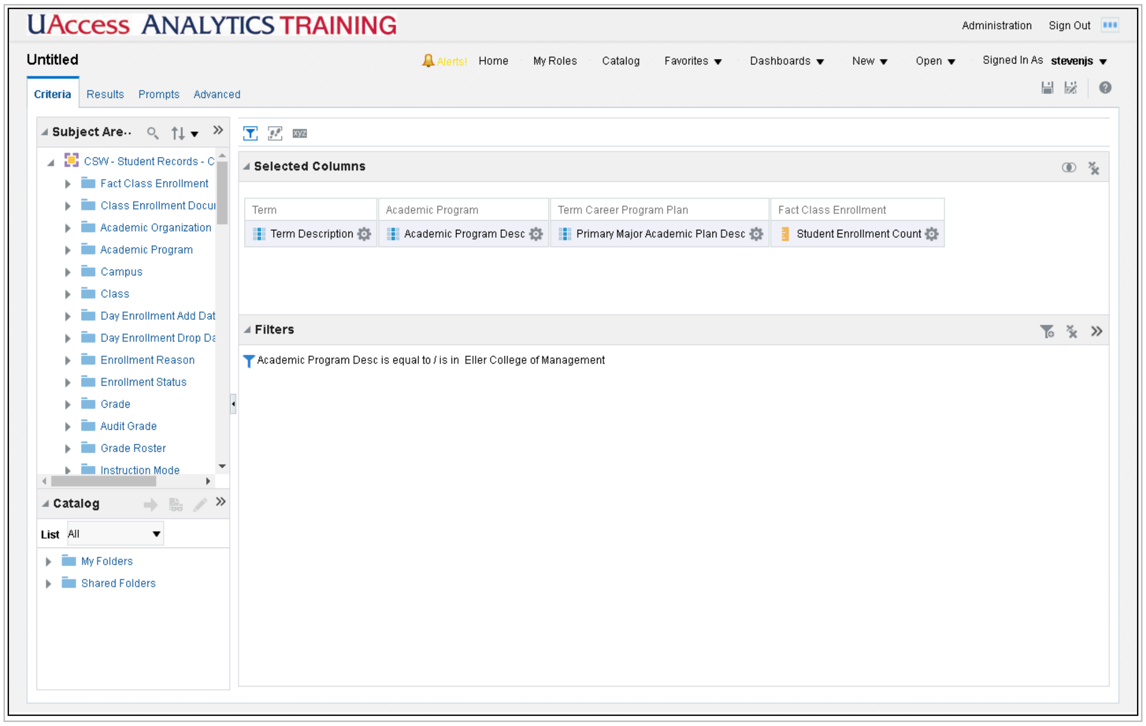
Step	Action
15.	You could also manually enter any item into the **Selected** pane. Click the **Edit** button. 

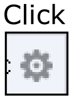


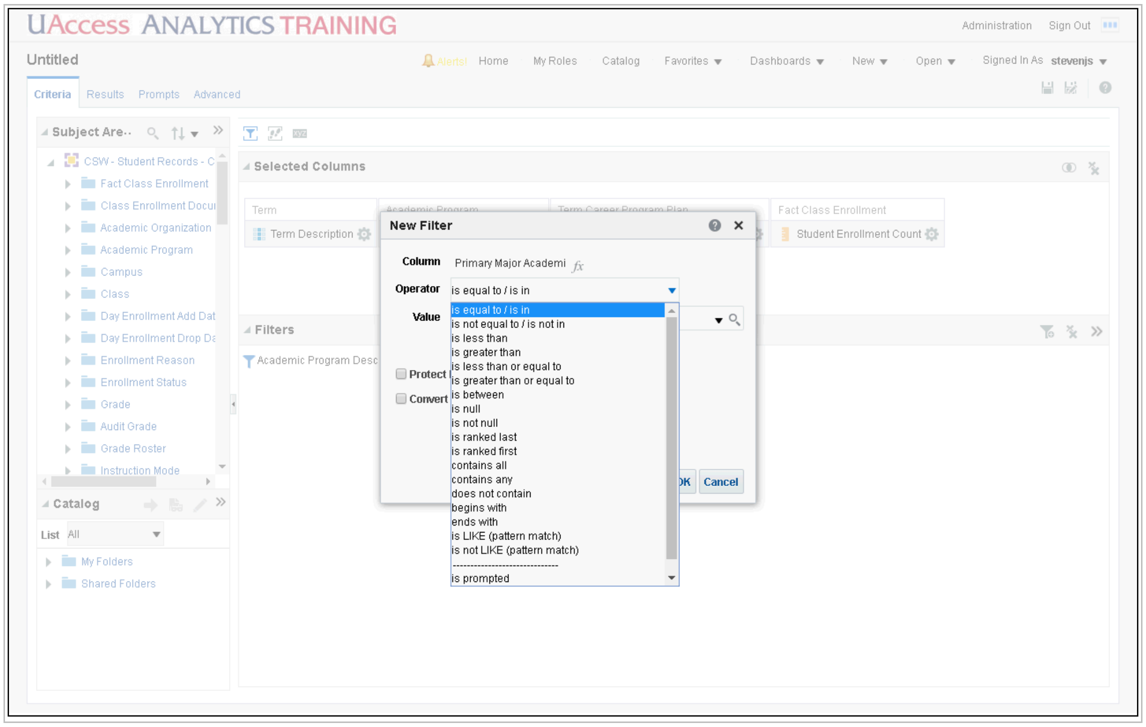
Step	Action
16.	Type your value into the field. You should be aware that if you misspell something, the system will not find that value. In addition, most values are case-sensitive. Any value you manually enter in the Selected pane must be an exact match for a value in the system in order for your filter to work. Click the **Cancel** button. 
17.	Let's find the value we wish to use. Double-click in the **Name** field. 



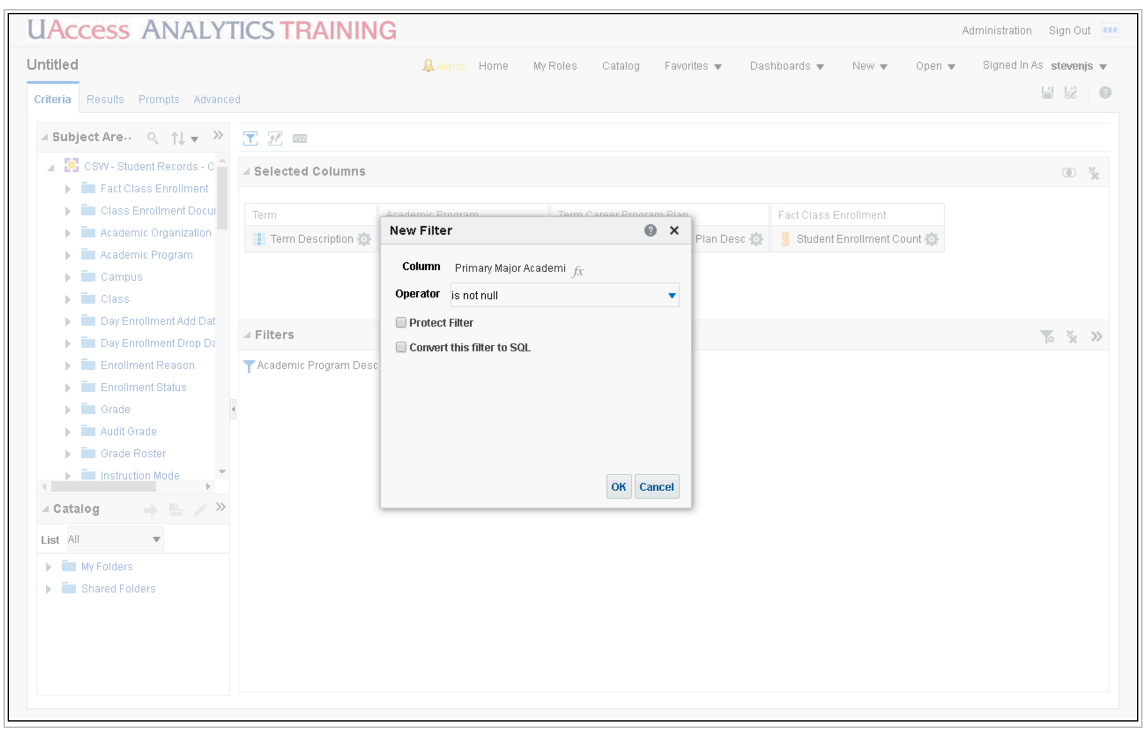
Step	Action
18.	Press **[Delete]**.
19.	Click the **Search** button. 
20.	Click the **Down** button of the scrollbar. 
21.	Double-click the **Eller College of Management** list item. 
22.	Click the **OK** button. 
23.	Click the **OK** button. 

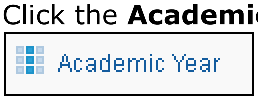


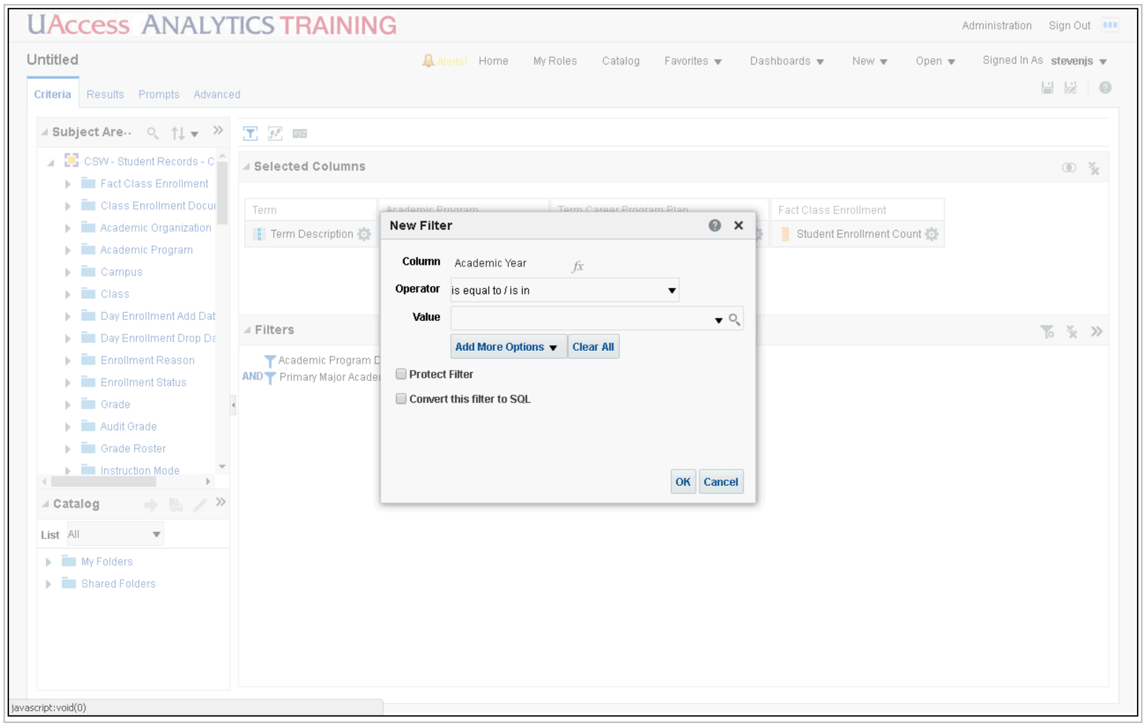
Step	Action
24.	You've created your first filter. Good job! Now you want to limit the count to only those students who've selected a major. Is there a data column in your analysis that you can use to create this second filter?
25.	Use the **Primary Major Academic Plan Description** column. Click the **Options** button. 
26.	Click the **Filter** list item. 
27.	As before, you've selected the data column. Now you need to select an operator. Click the **Operator** dropdown button to activate the menu. 
28.	Which operator should you select if you wish to count only those students who've actually selected a major?



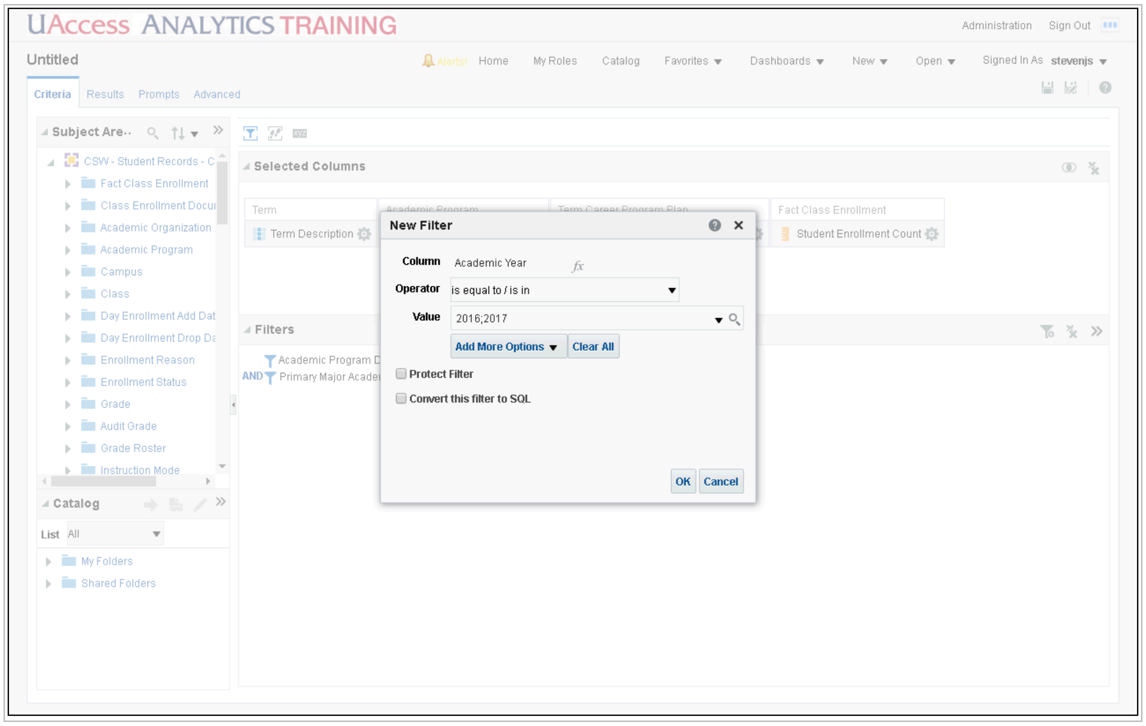
Step	Action
29.	Click the **is not null** list item. is not null



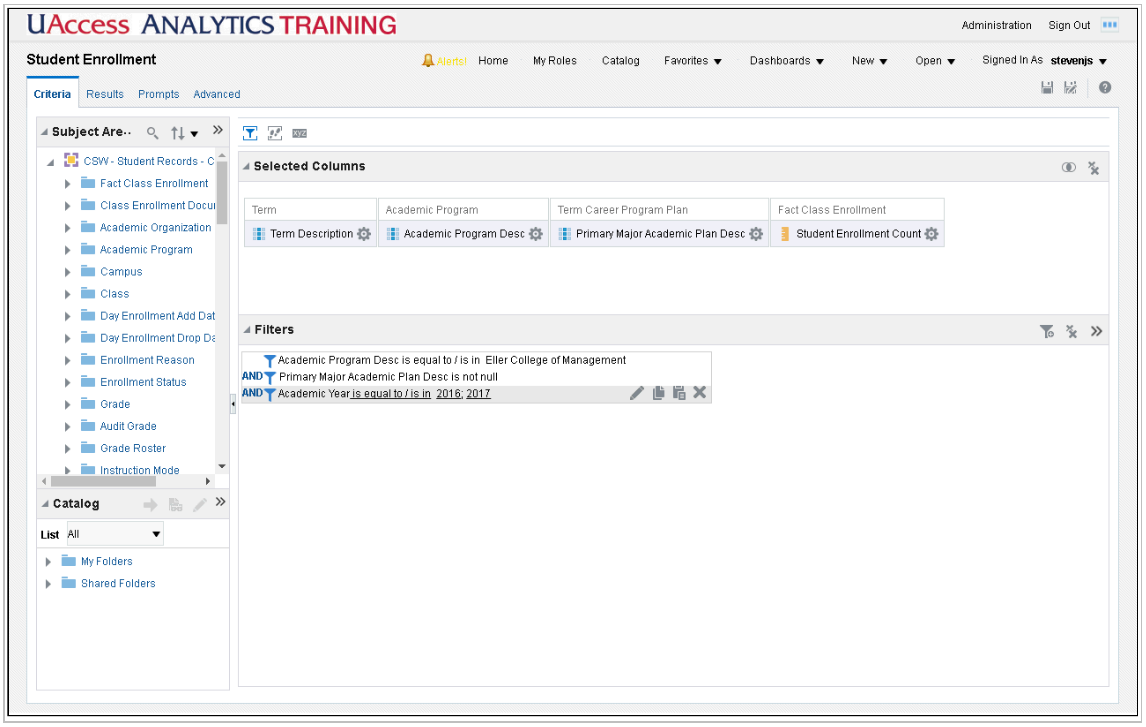
Step	Action
30.	This filter is an exception to the "three elements" rule mentioned earlier. The operator you selected implies that any value is acceptable. Click the **OK** button. 
31.	The last filter you need will limit the data to a short time frame. You could use the Term Description column to create that filter. But you can also use any other data column from the subject area, even if that data column is not in your analysis.
32.	To do so, you can use the "martini glass" button on the far right end of the Filters bar. Click the **Create a Filter** button. 
33.	The column you're looking for is not here. Click the **More Columns** list item. 
34.	Click the **Down** button of the scrollbar. 
35.	Click the **Term** dropdown button to activate the menu. 
36.	Click the **Academic Year** list item. 
37.	Click the **OK** button. 



Step	Action
38.	You could select two academic years from the Value drop-down menu, or you can simply type the values into the field. Use a semicolon (;) to separate the values. Enter "**2016;2017**" in the field.



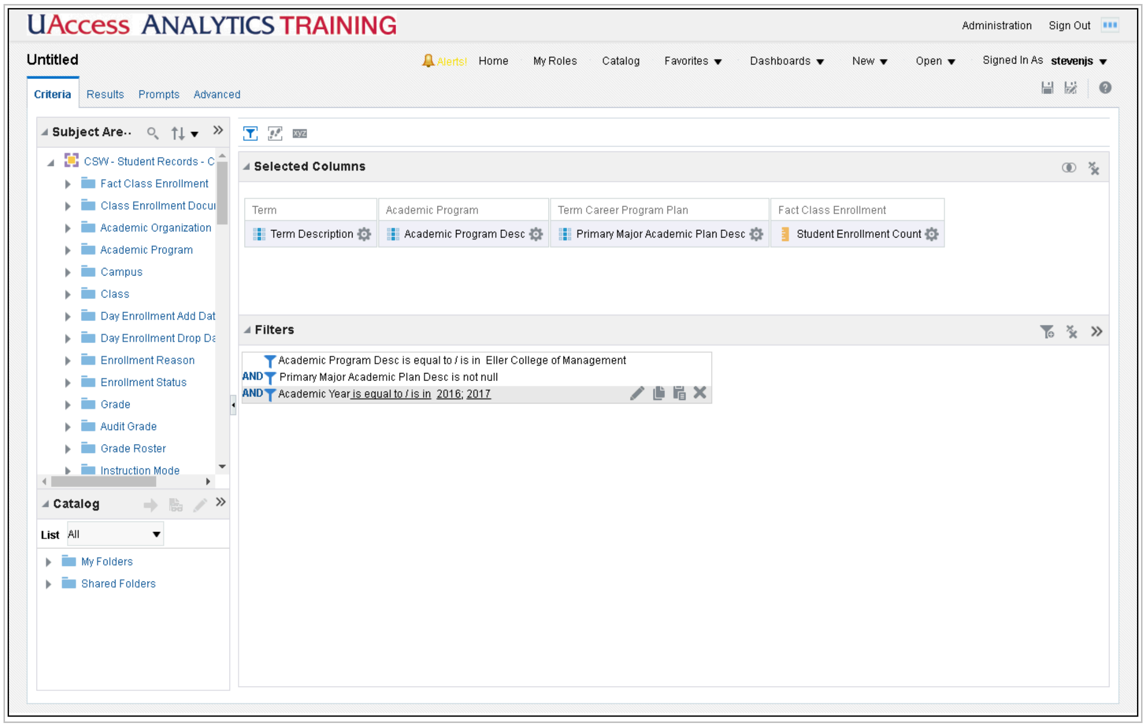
Step	Action
39.	The semicolon (;) between the two values means *or*, as in *this or that.* Click the **OK** button. 



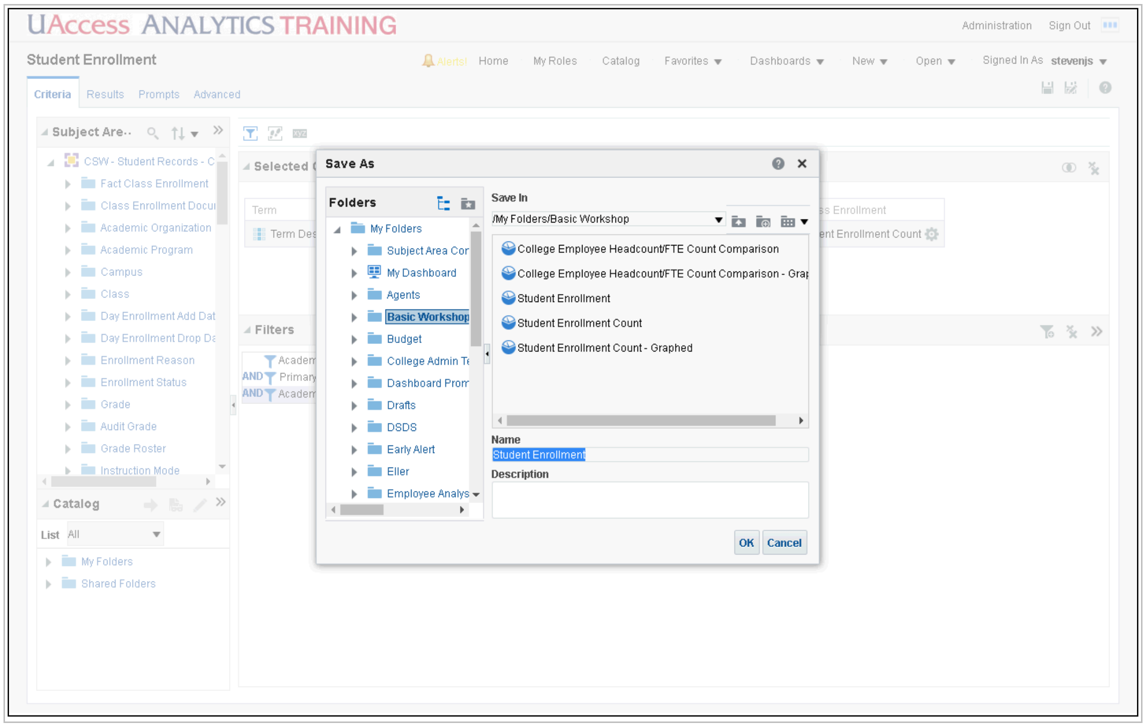
Step	Action
40.	If you ever need to edit a filter, you can hover your mouse over that filter to get a small button bar. With those buttons, you can edit, copy, paste, or delete any particular filter.
41.	**End of Procedure.**

Saving an Analysis

Procedure



Step	Action
1.	You've done enough work at this point that you should save your analysis. Click the **Save** button. 
2.	Rather than save the analysis directly into the My Folders folder, you could create a subfolder. Click the **New Folder** button. 
3.	Enter "**Basic Workshop**" in the field.
4.	Click the **OK** button. 



Step	Action
5.	Now name the analysis. Enter "**Student Enrollment**" in the field.
6.	You could also give the analysis a description.
7.	Click the **OK** button. 
8.	Notice that the analysis is now named **Student Enrollment** in the upper left-hand corner of the screen.
9.	**End of Procedure.**

Working with Columns

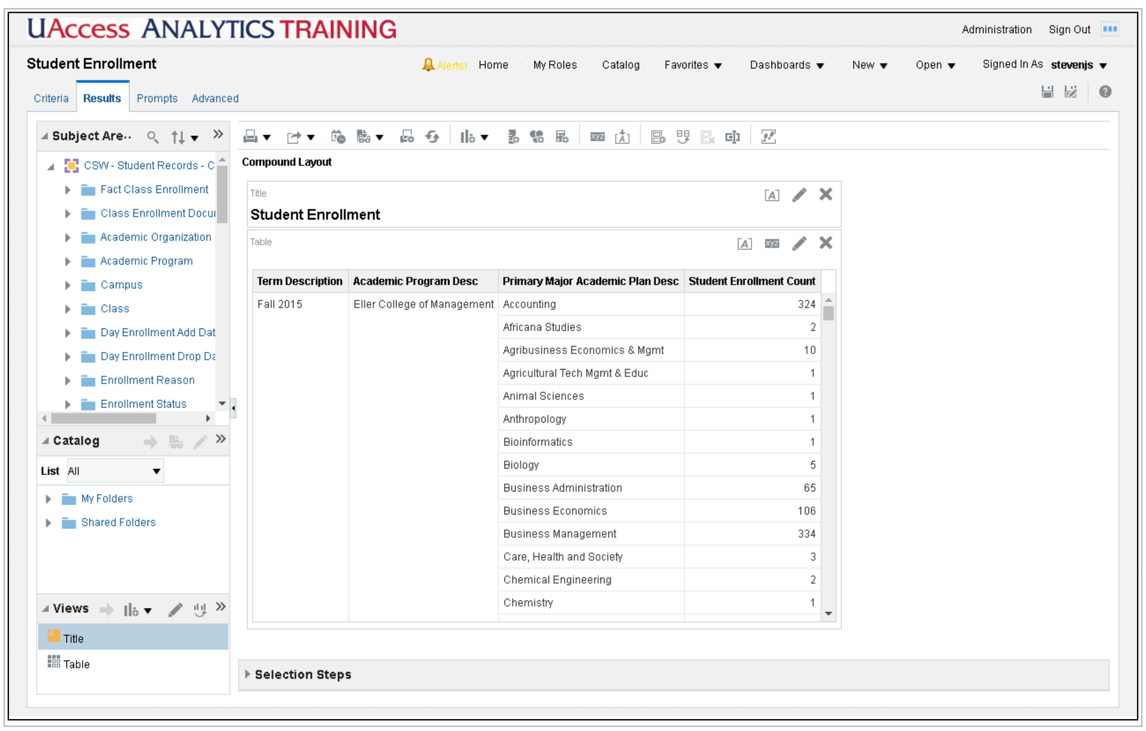
Procedure

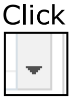
You've created, filtered, and saved the analysis. It's time to look at the results.

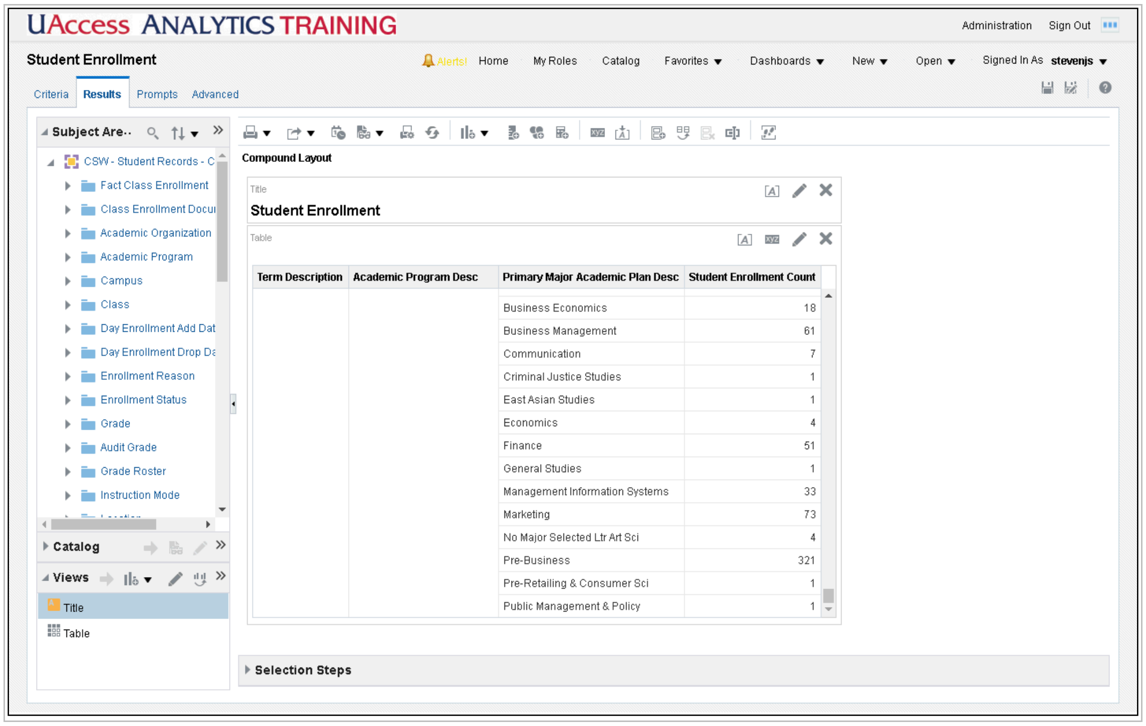
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>While you've been creating and filtering the analysis, you've been working on the Criteria tab.

Click the Results tab.

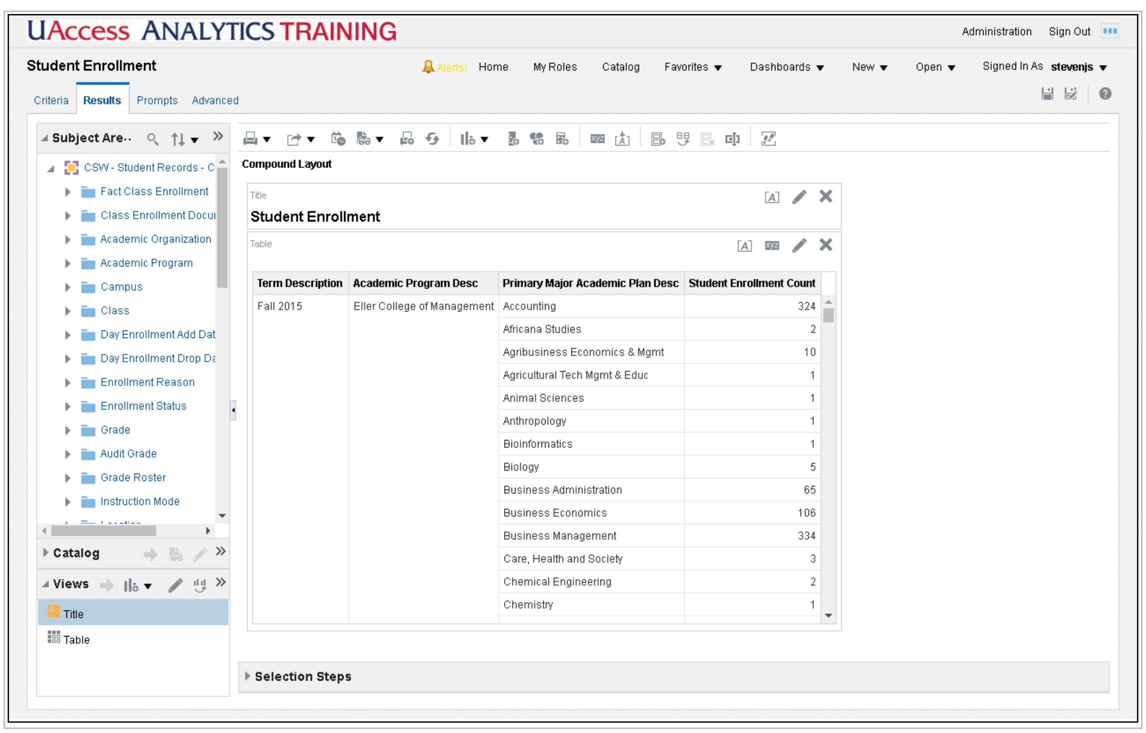
</td></tr>
</table>



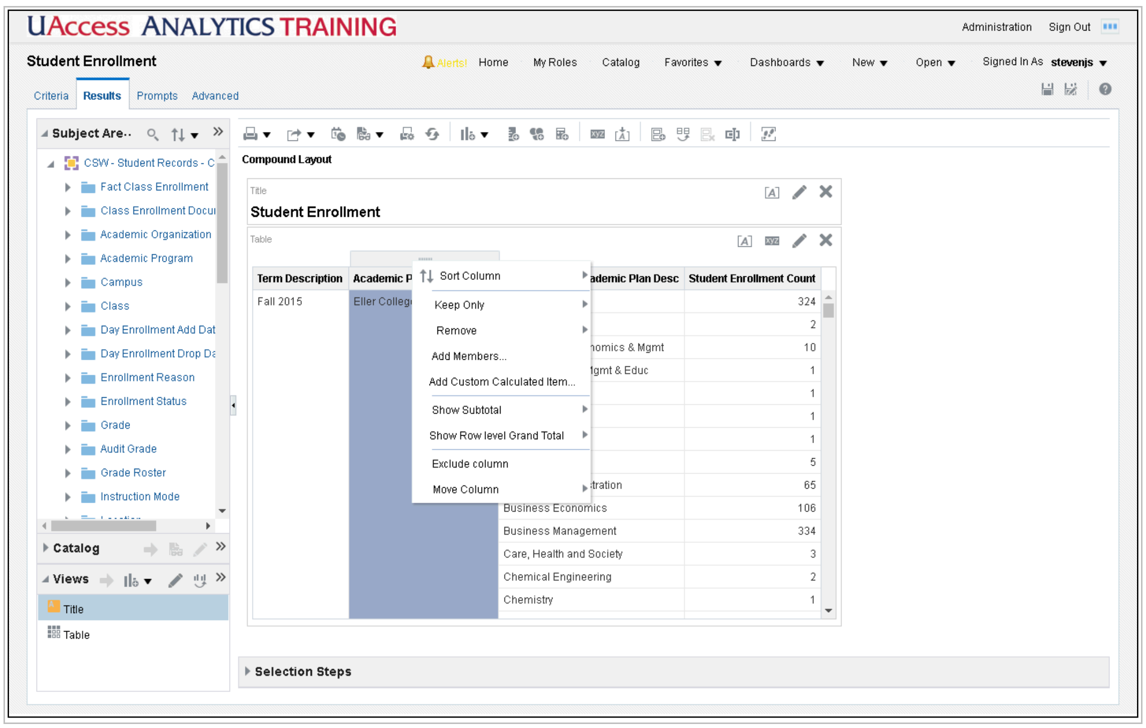
Step	Action
2.	The layout of the Results tab is similar to what you saw on the Criteria tab. There's a Subject Areas pane in the upper left. It lists the contents of the Subject Area, just as it did on the Criteria tab. Below that is a Catalog Pane. That pane is related to the general Catalog, but the Catalog Pane only shows filters. In the lower left, you can see a Views pane. That views pane lists all of the views that are available in this analysis. By default, you will see the Title and Table views.
3.	On the right, you see the Compound Layout pane, which includes the analysis you created. In that analysis, you can see the Title and Table views, which are the default views you noted in the Views pane. The table contains data in the four columns you added to the analysis.
4.	You won't need the Catalog pane, so you can collapse it. You'll be able to see more of the Subject Areas pane. Click the **Catalog** dropdown triangle. 
5.	Take a closer look at the analysis in the Compound Layout pane. By default, you'll see about the first 20 rows. You can scroll down further into the analysis, if you wish. Click the **Down** button of the scrollbar. 
6.	You can continue scrolling until you reach the bottom of the analysis. Click the **Down** button of the scrollbar. 



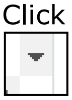
Step	Action
7.	You can also scroll back up to the top of the table, of course. Release the mouse button.

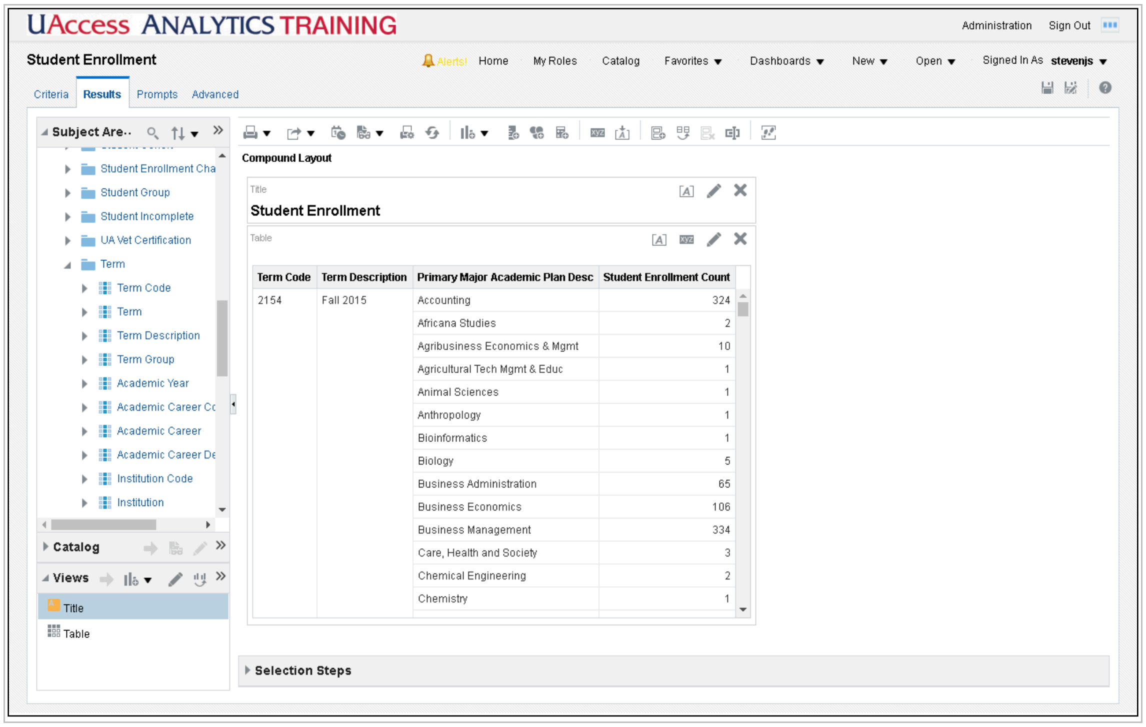


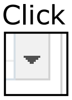
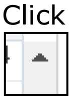
Step	Action
8.	As you scrolled through, you might have noticed some of the data that's in the analysis. Although you added the Academic Program Description column when you created the analysis, it really doesn't add any useful data to the report. You can get rid of that column. Right-click the **Academic Program Desc** column header. Academic Program Desc

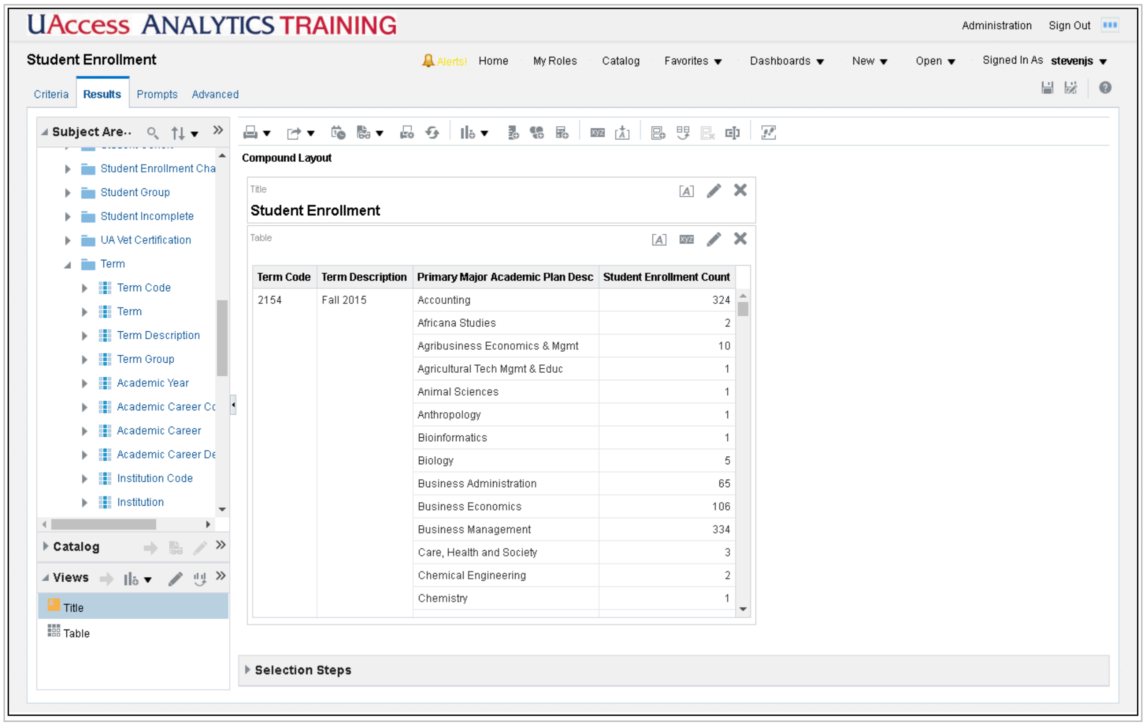


Step	Action
9.	Click the **Exclude Column** list item. Exclude column
10.	The Academic Program Description column has now been excluded from the analysis. Excluding a column doesn't delete that column, nor does it simply hide the data from view. Exclude means that a column has been removed from a specific view, and has been put to the side for possible use later.

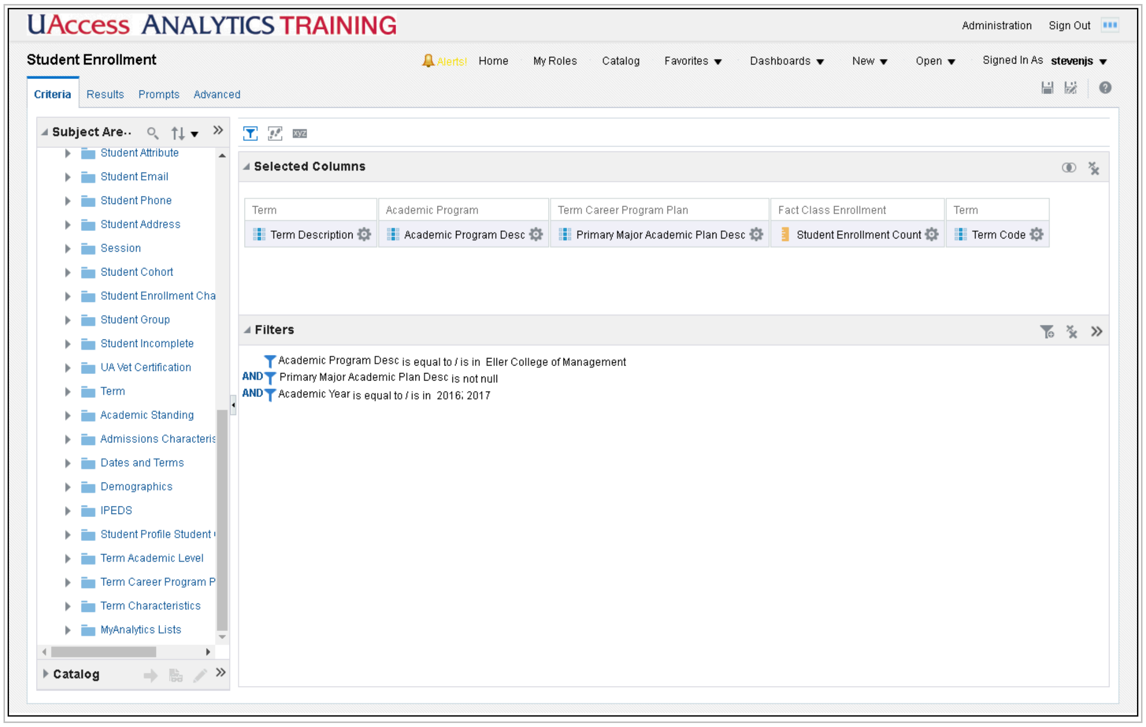
Step	Action
11.	One more thing about the data. As you were scrolling through, did you notice how the data was sorted in the table? Every analysis you create in Analytics has a default sorting order. By default, the data in the analysis is sorted by the left-most column first, then by the second column, then the third column, etc. This analysis is sorted first by Term Description. Is the data is chronological order, alphabetical order, numeric order, or some other order?
12.	The data is in alphabetical order. Since the individual pieces of data in that column begin with a letter, the data *has* to be in alphabetical order by default. If you wish to order the data in the analysis chronologically, you need to add another column of data. You should do that right from the Results tab. Click the **Down** button of the scrollbar. 
13.	The particular data column you would typically add is the "other" version of the column causing the problem. In this case, it's the Term *Description* column causing the issue. The solution to the issue is to add the Term *Code* column. Click the **Term** dropdown button to activate the menu. 
14.	Find the **Term Code** column and drag it into the analysis. Once you see the vertical blue bar highlighting the place you want to drop the column, release the mouse button. Release the mouse button.

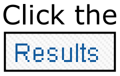


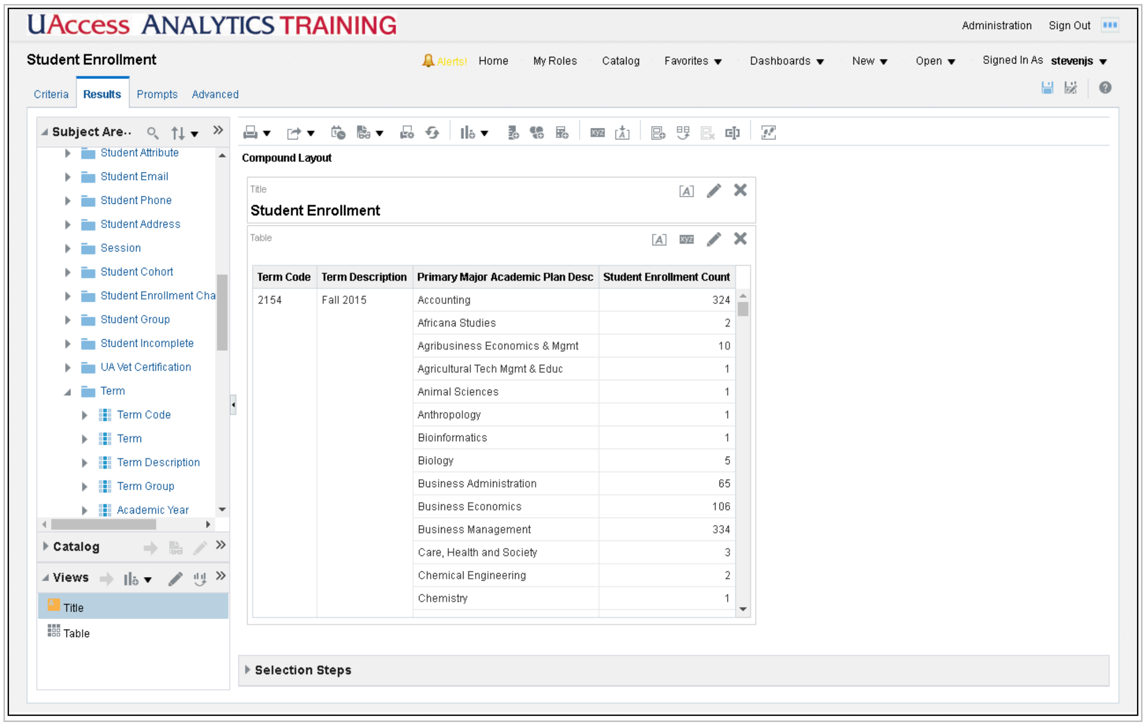
Step	Action
15.	The Term Code column has been added to the left side of the table. Scroll up and down through the table. You'll see that all of the data is now in order chronologically, thanks to the Term Code column. Click the **Down** button of the scrollbar. 
16.	Unfortunately, the values seen in the Term Code column can be confusing. People unfamiliar with term codes won't necessarily understand that "2155" refers to the Winter 2015 term. Fortunately, you can hide that data column so you don't have to look at it. You will do that in the next section. Click the **Up** button of the scrollbar. 



Step	Action
17.	Now that you've made some changes to the analysis on the Results tab, take a look at the changes that have been taking place on the Criteria tab. Click the **Criteria** tab. 



Step	Action
18.	There are two things to note here: 1. The Academic Program Desc column is still in the analysis. That's the column that you Excluded from the table. "Exclude" does not mean "delete." 2. The Term Code column that you added on the Results tab is present, but note that it's on the far right side of the row of data columns. Where did you add that column on the Results tab? When you moved from the Criteria tab to the Results tab that first time, the system created a "disconnect" between the two tabs. The same data columns must exist on both tabs in some fashion, but the order of the columns and how and whether you can see them is determined elsewhere.
19.	Click the **Results** tab. 

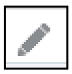


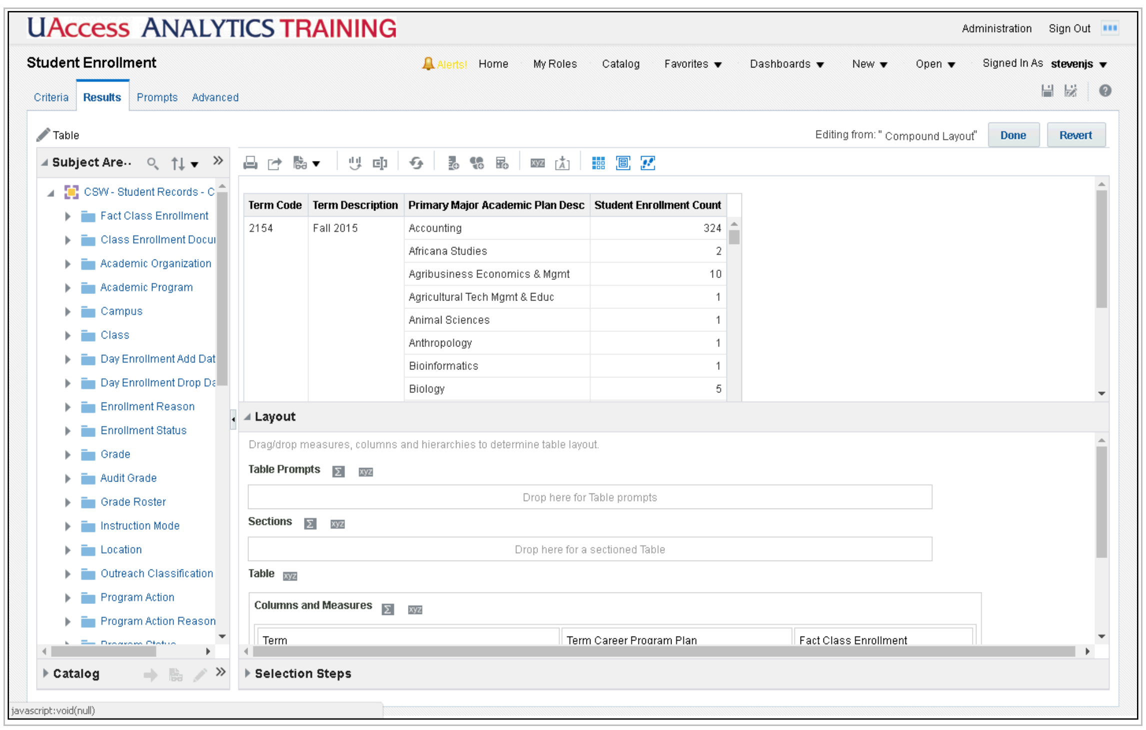
Step	Action
20.	Having made a few changes, you should once again save your analysis. Click the **Save** button. 
21.	Those are the basic steps for excluding and adding data columns in the Results tab. **End of Procedure.**

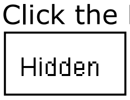
Editing the Table View

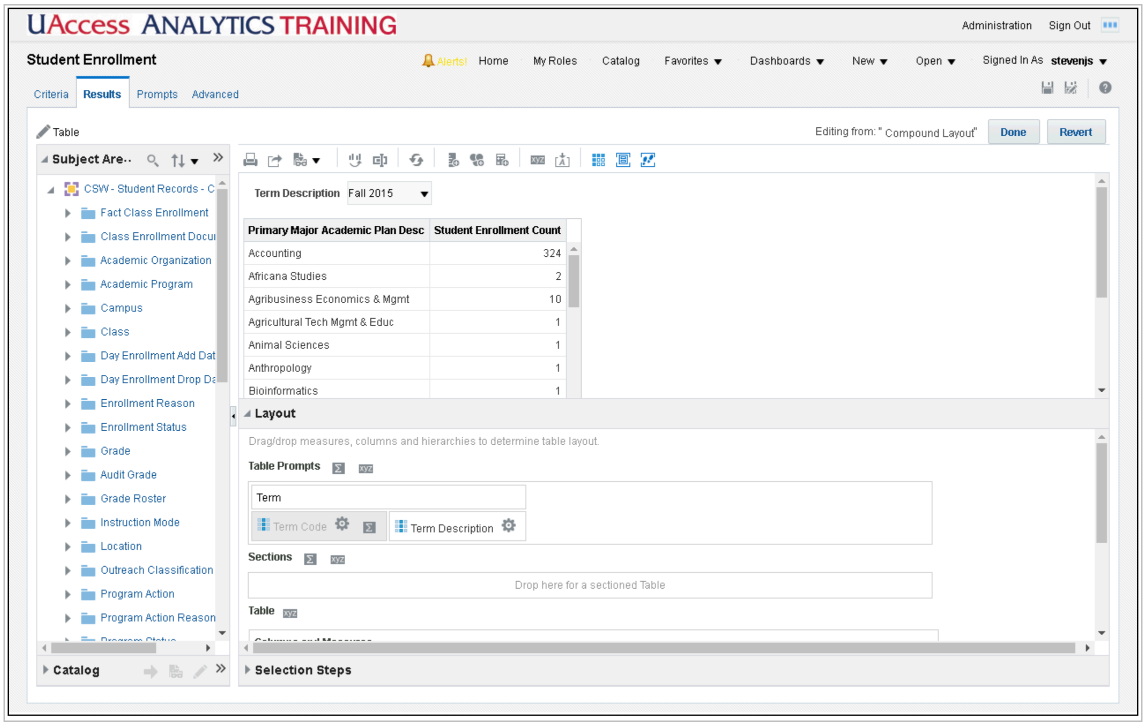
Procedure

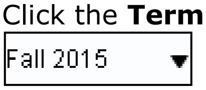
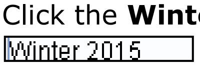
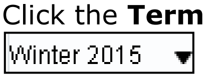
You can change the structure and functions on the table by editing the table.

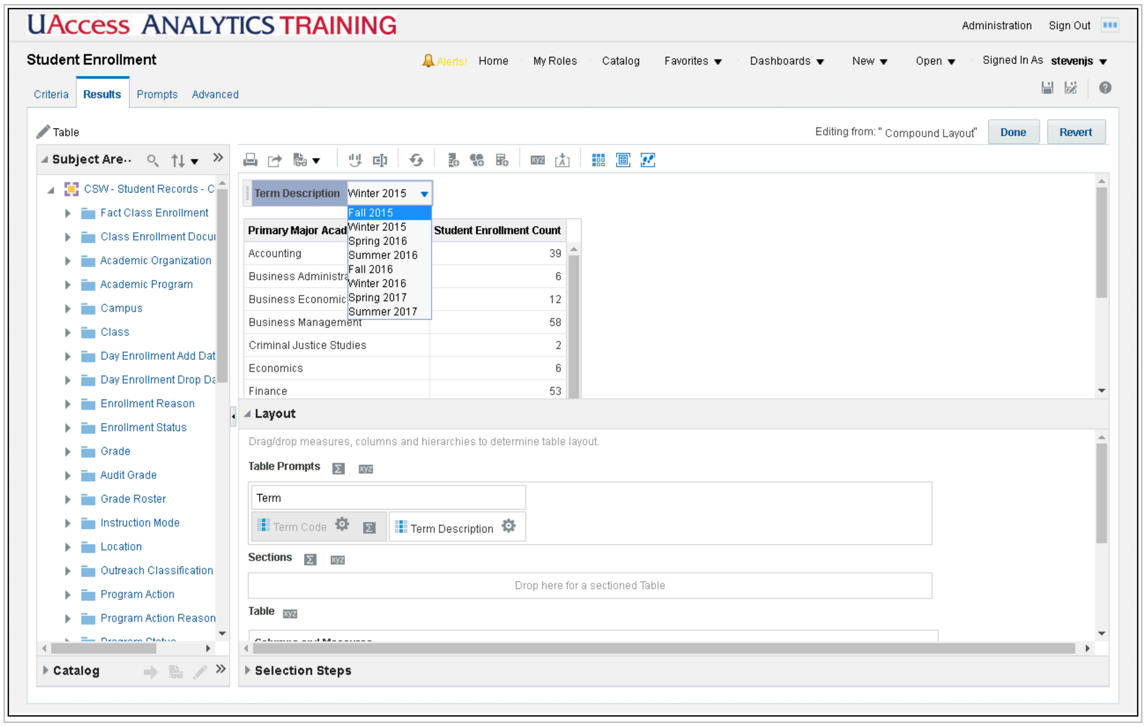
Step	Action
1.	Additional changes can be made to the table, but those changes are better made within the structure of the table. Locate the "pencil" button in the upper-right corner of the table. That's more properly called the **Edit View** button. Click the **Edit View** button. 

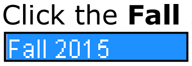
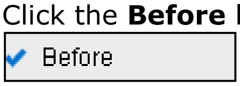


Step	Action
2.	You've moved from the Compound Layout screen into the inner workings of the table. In the upper-left corner, you can see that you're editing the table. Below that pencil icon, you can see you still have access to the Subject Areas pane and the Catalog pane. On the right, you have a preview pane. Below that you see the layout pane, with a number of different areas in it.
3.	In the Layout pane, you have a Table Prompts area and a Sections area. More on those in a moment. You also have a Table area that has a large Columns and Measures box in it. That box contains most of the data columns you added to the analysis. Below that is an Excluded area that contains the Academic Program Desc column. That's the data column you excluded earlier using the right-click function on the Results tab.
4.	Before we started editing the table, you'd added the Term Code data column to the left side of the table. Because the values in that column can cause confusion, you might hide the **Term Code** column. Click the **More Options** button. 
5.	Click the **Hidden** list item. 
6.	Once the **Table Prompts** area is highlighted by the blue box, you can drop the data columns. Release the mouse button.

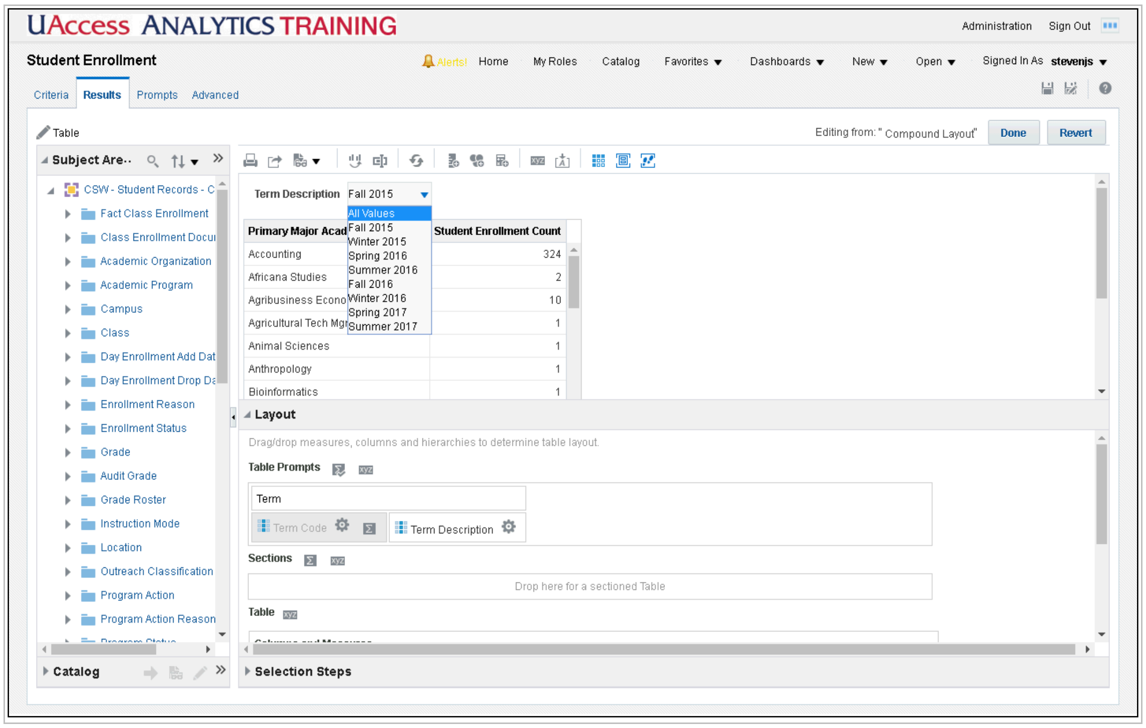


Step	Action
7.	Take a look at what you've wrought. Creating a **Table Prompt** means you get a drop-down menu containing the values that used to be in the Term columns when the column was a column! Click the **Term Description** drop-down list. 
8.	The user can decide which term they'd like to look at. Click the **Winter 2015** list item. 
9.	Now you're seeing data for Winter 2015. Click the **Term Description** drop-down list. 

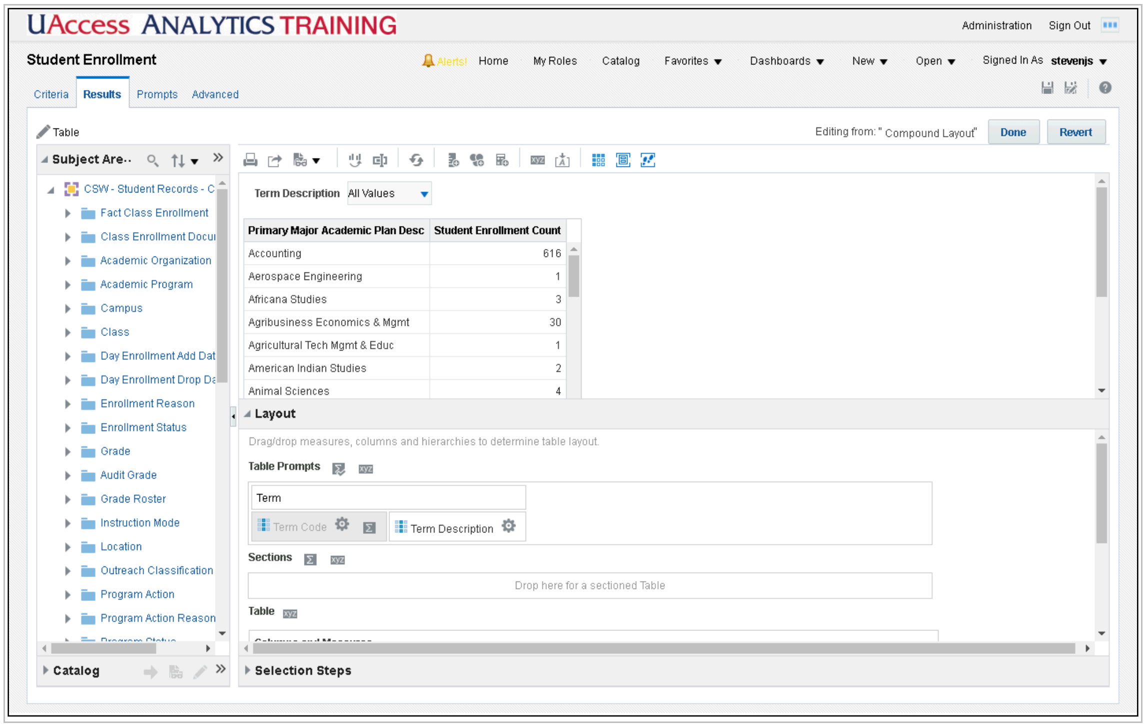


Step	Action
10.	And you can switch back to Fall 2015. Click the **Fall 2015** list item. 
11.	Why did you have to move both of the Term columns into the Table Prompts area if you're only able to see the Term Description column? What purpose does the Term Code column serve?
12.	One view of the data you lost when you moved the two Term columns into the Table Prompts area was the ability to see all of the data at one time, or in one list. You can add one thing to the **Table Prompts** area that will give the report viewers the ability to see a version of all the data again. Click the **Totals** button. 
13.	If you think the report viewers would typically like to see the totals first and *occasionally* review individual terms, select the **Before** option. If viewers would most likely be interested in individual terms, and only occasionally be interested in totals, select the **After** option. Click the **Before** link. 

Step	Action
14.	Note the check mark on the Totals button in the Layout pane. Click the **Term Description** drop-down list. Fall 2015

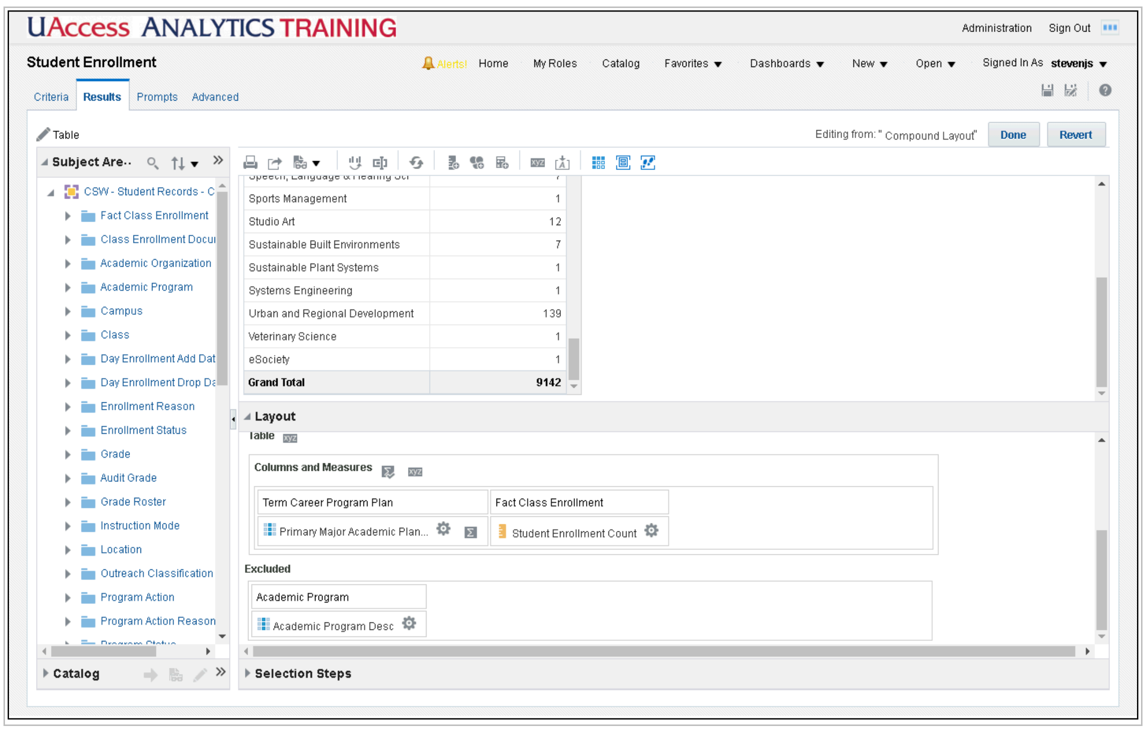


Step	Action
15.	A new **All Values** item has been added to the top of the list. If you'd selected the After option, the new item would be at the bottom of the list. Click the **All Values** list item. All Values



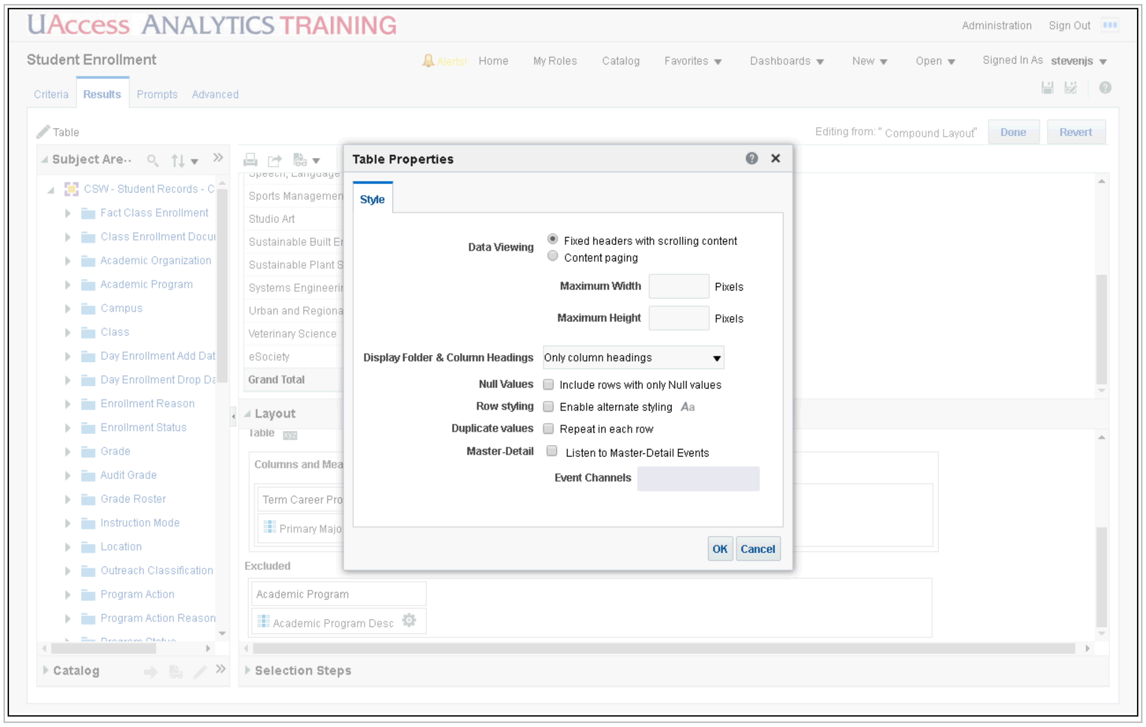
Step	Action
16.	The table now shows you combined values for all of the different terms. Be careful using the word *total* in this situation. What you're seeing in this table are *not* totals. The numbers from the Accounting major for each academic term, for example, are not simply added together. The number of Accounting students you see in the All Values version of the table represents a *distinct count* of Accounting students pulled together from the eight academic terms available in this analysis. If you were to list the student's names, you'd see the given number of unique names. If you added up or summed the numbers of Accounting students from each term, you'd see that there were over 2000 seats filled up in Accounting classes. Those seats were filled by the given number of individual, unique students.
17.	You can also add a grand total to the bottom of the table. To do that, you need to click the Totals button in the **Columns and Measures** area. Click the **Totals** button. 

Step	Action
18.	There's only one option here. Click the **After** link. 
19.	You might have to scroll down in the preview pane to see the bottom of the table. Click the scrollbar.
20.	Then you can scroll down in the table itself.



Step	Action
21.	You can see the total number of students taking classes at Eller during the two selected academic years. Once again, avoid using the word *total* in this case. That number represents a *distinct count* of students. Although there's no way to be certain using the data you're seeing, you can bet that at least one student took more than one of those classes at Eller.

Step	Action
22.	There is one other change you could make to this screen, if you wish. Click the **Table View Properties** button.



Step	Action
23.	By default, tables in Analytics are designed to scroll under fixed headers. Some people prefer to have a paginated table. *Note: You will find separate instructions for this process on the **Basics: Scrolling Data or Paginated Data** document on the UAccess Community > Resources > Analytics web page.* Click the **Content Paging** option.
24.	Click the **OK** button. OK

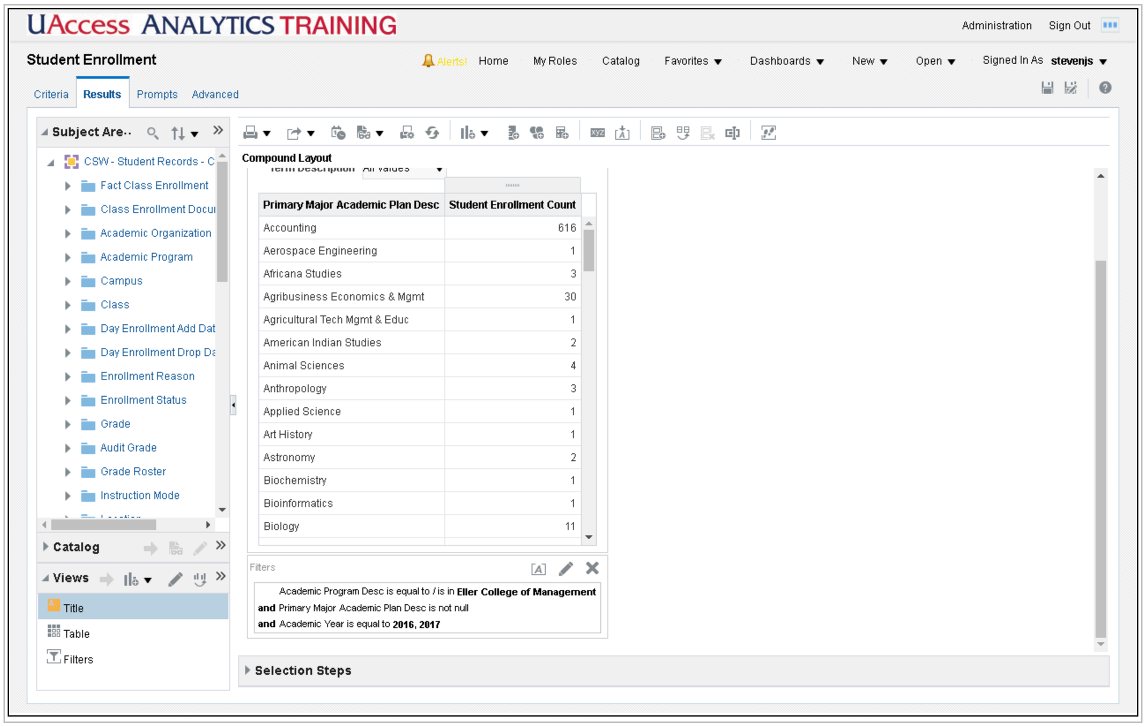
Step	Action
25.	Now the table has paging buttons available. You could page through the table 25 rows at a time, or expand the table to see all rows. You could also set the table back to a scrolling table. Click the **Table View Properties** button.
26.	Click the **Fixed headers** option.
27.	When you select this Fixed headers option, the default maximum width for the table is 600 pixels. The default maximum height is 700 pixels. The maximum values for those fields are 2880 pixels wide and 1800 pixels tall. Click the **OK** button. OK
28.	You have a scrolling table again. You've also made all of the changes you need to make. Click the **Done** button. Done
29.	You should take this opportunity to save your analysis. Click the **Save Analysis** icon.
30.	You're nearly done with this analysis. **End of Procedure.**

Finishing Up

Procedure

There are one or two things left to do to complete this analysis.

Step	Action
1.	The default version of any analysis has just two views: the Title view and the Table view. You can see those views listed in the Views pane in the lower left. You should add at least one more view to all of your analyses to make them complete, and make them easier for any viewer to understand. Click the **New View** button. 
2.	The view you should almost always add is the **Filters** view. Adding this view will put a picture of the analysis filters at the bottom of the Results screen. That picture lets the users see how the analysis has been filtered, which is almost always a good idea. Click the **Filters** list item. 



Step	Action
3.	There's that image of the filter. You've created a nice, simple analysis. Be sure you save your work! Click the **Save** button. 
4.	Good job! **End of Procedure.**

Exercise - Creating a New Analysis

Scenario: *Your boss has asked you to create a very simple analysis. She would like to see a listing of all the colleges on campus, along with a count of their employees and a count of their FTE positions. The list should be sorted to show the colleges with a greater number of employees at the top.*

Objectives: The following objectives are intended to be accomplished with minimal input from others. You are, however, allowed and encouraged to ask questions for clarification, direction, and assistance. There are *hints* or *additional instructions* listed in italics at the end of some steps.

- Create a new basic analysis.
- Create a basic filter for that analysis.
- Add a new view to the basic analysis.
- Save the analysis.

Two Questions Before You Begin:

1. You have an analysis on your screen already. What, if anything, must be done with that report before you start creating a new one?

2. Provided you have a plan in mind for your analysis, what's the very first step you should take in Analytics when you need to create a new analysis?

Step-by-Step Instructions:

1. Create a new analysis using the **HCM - Employee Profile** subject area.

2. Add these three data columns:

- **Department > College Name for Job Department**
- **Measures > Counts > Employee Headcount**
- **Measures > Counts > Employee FTE – Total**

3. Add a **filter** to limit the data to just the various colleges on all campuses. Do not include any auxiliary departments like Parking & Transportation. *If you select all of the colleges, you will end up with about 19 rows of data in your analysis.*

4. **Order** or **Sort** the information properly. *Read the last sentence of the scenario at the top of this page for a big hint.*

5. **Edit** the **Column Properties** and **format the data** such that any numbers in the report are displayed with two decimal places. *This step is optional*.

6. Look at the **Results**.

7. Add the **Filters** view.

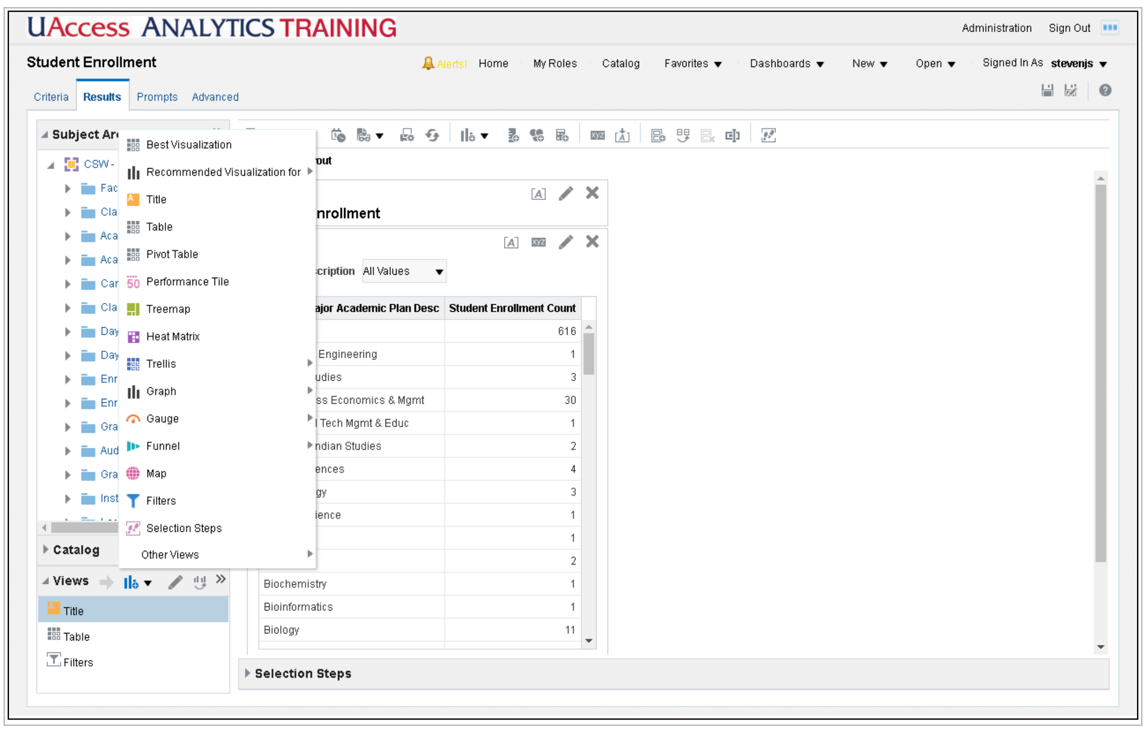
8. **Save** the analysis in your **Basic Workshop** folder as **College Employee Headcount / FTE Comparison**.

Adding a Graph

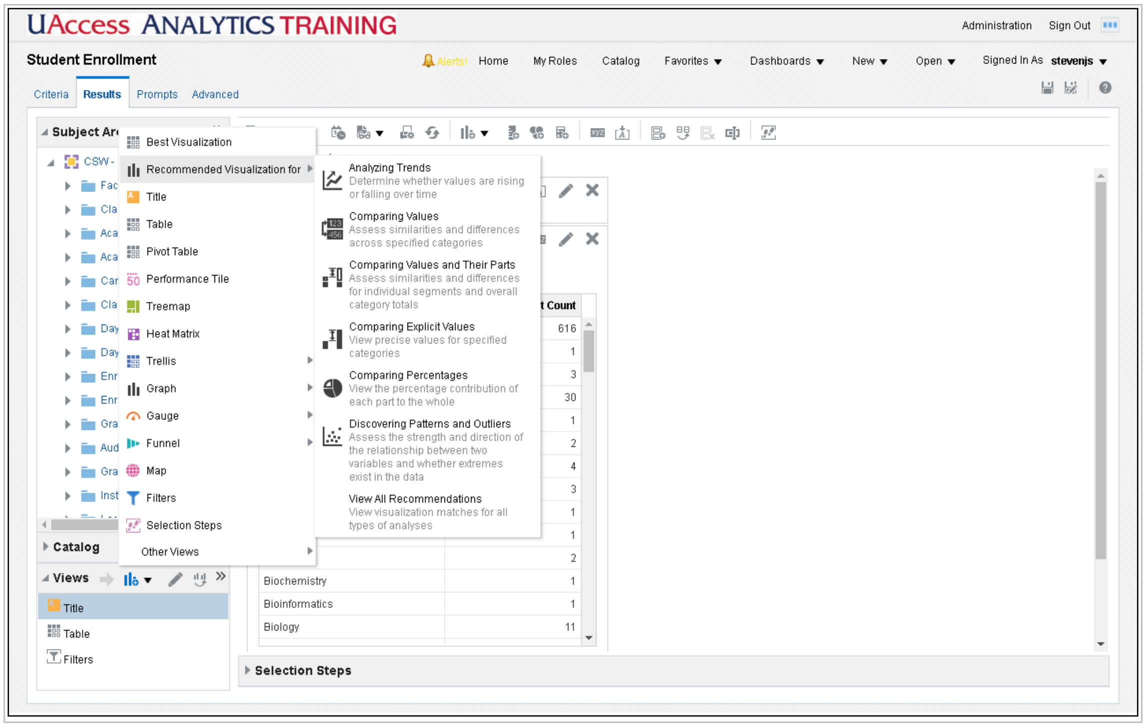
Procedure

A table of data is useful. Adding a graph to the analysis can help viewers get a better idea of any trends in enrollment.

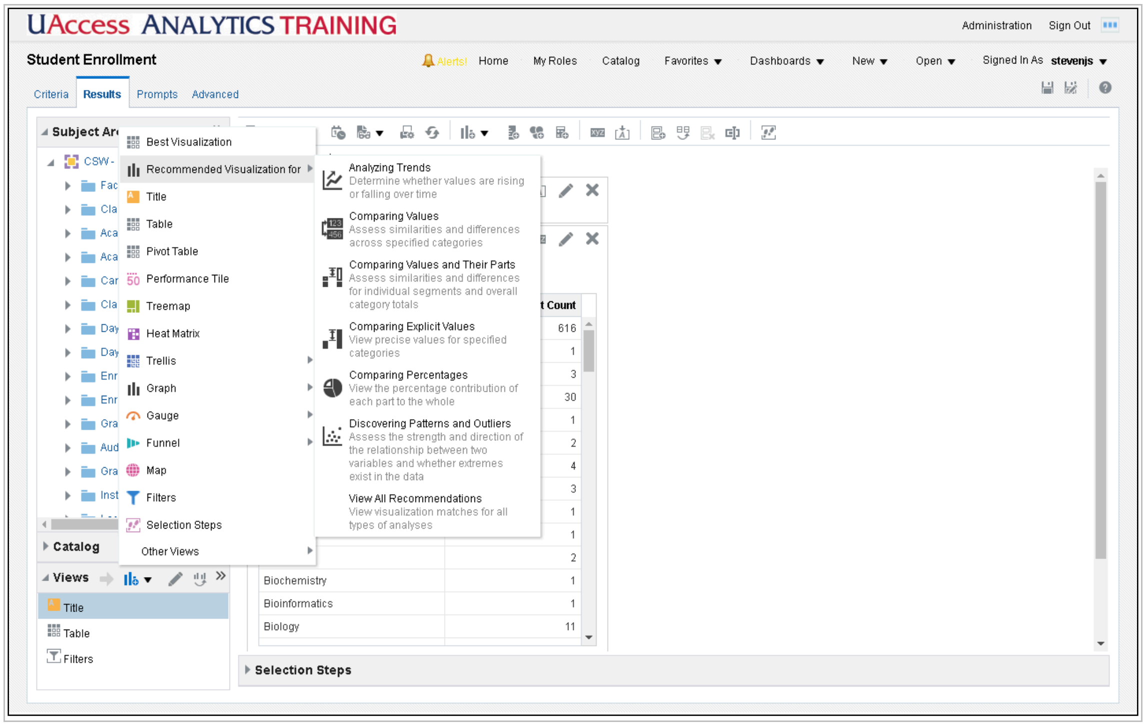
Step	Action
1.	When you use the New View button in the Views pane, the system takes you directly into editing mode. This is usually the best option for those views that contain data. Click the **New View** button. 

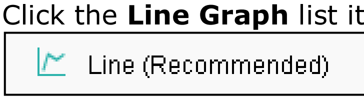


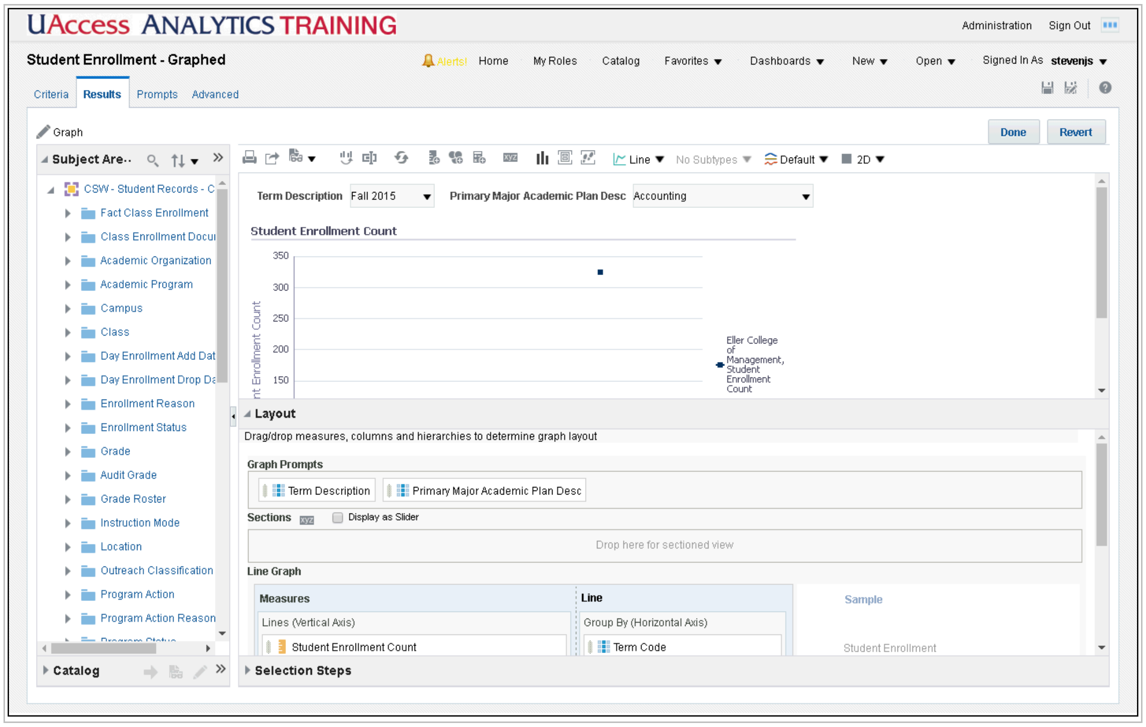
Step	Action
2.	Analytics can recommend different views for you. In this case, you're looking for a graph view that will help display trends in enrollment. Hover your mouse over **Recommended Visualization for**



Step	Action
3.	There are several options here, each of which will launch a different type of graph or provide a different list of graphs from which to choose. The offerings are dependent upon the type of data available in the subject area you're using. The list you see here is typical.

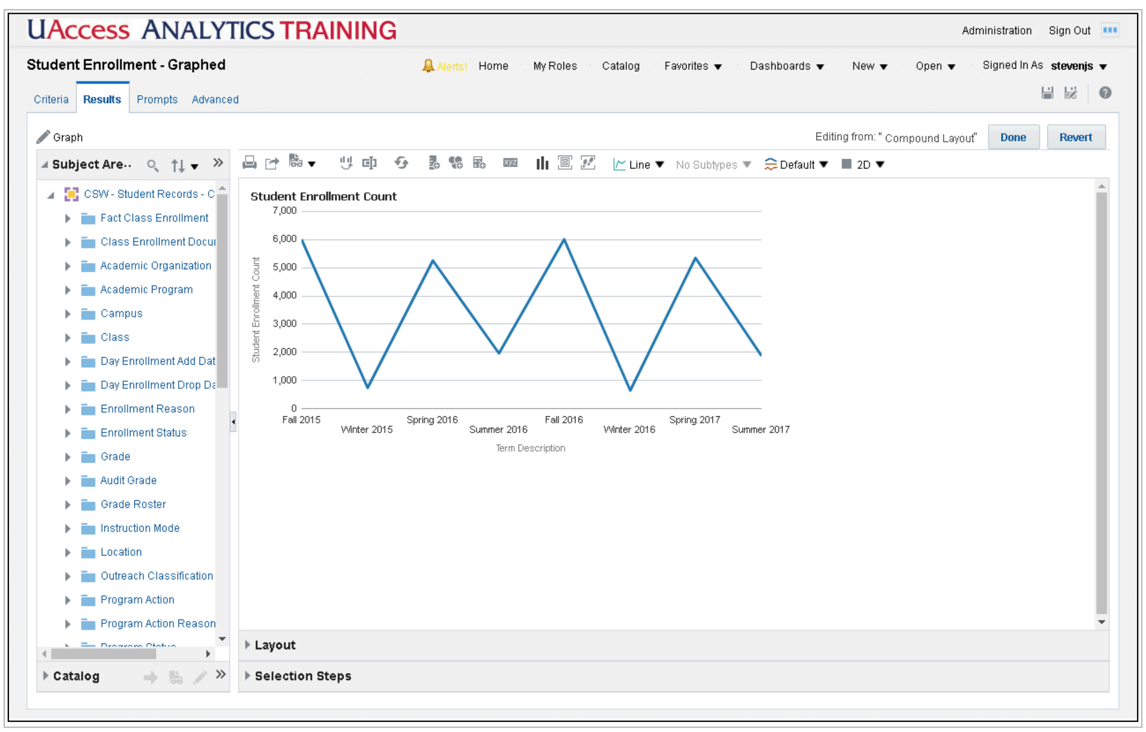


Step	Action
4.	The choice is obvious. You are trying to create a graph that will show trends in student enrollment over time. Click the **Analyzing Trends** list item. 
5.	Even within the trends option, there are options. The most-often-used type of graph for showing trends is the line graph. Click the **Line Graph** list item. 

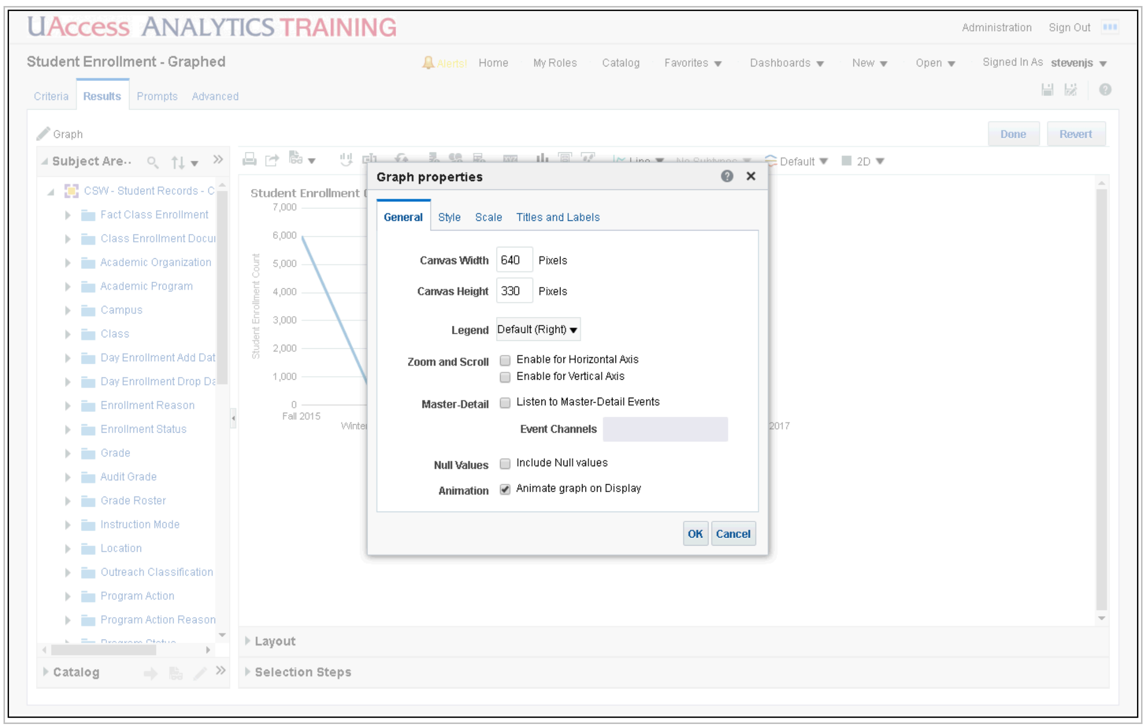


Step	Action
6.	Similar to the edit screen for a table, this edit screen for a graph has several panes. There's the ubiquitous Subject Areas pane on the left, with the Catalog pane below it. On the right is the Preview pane, with the Layout pane below. In the Layout pane, you see the Graph Prompts and Sections areas. You also see the Line Graph area, which has a Measures section and a Line section. These two sections of the Line Graph area are what actually create the graph. The other areas are supporting areas. At the bottom is the Excluded area.
7.	The system tried to create the graph for you, but it's not always as successful as you might wish. In this instance, the data columns seem to be scattered randomly around the different areas. It's your job to realign or move the data columns to create the graph you need. One thing that's important to note is that the data column represented by a yellow icon -- a measure -- has automatically been placed in the Measures section of the Line Graph area. The Measures section is where any data column that contains numeric data that you wish to measure or display should be placed, regardless of the color of the icon.

Step	Action
8.	Since you're creating a graph to show trends of **student enrollment** over **time,** any data columns that fit those two categories should be in the Line Graph area. The Term Code column is already in place in the Line section of the Line Graph area. Now drag the **Term Description** column out of the Graph Prompts area and into the Line section of the Line Graph area. Place the column below the Term Code column. Release the mouse button.
9.	You can see that the system is now showing a real graph in the Preview pane. There are more data columns to move. Drag the last column out of the Graph Prompts area and drop it in the Excluded area. Do the same with the Academic Program Desc data column from the Line box. Then collapse the Layout pane. Click the **Layout Pane Collapse** button. 

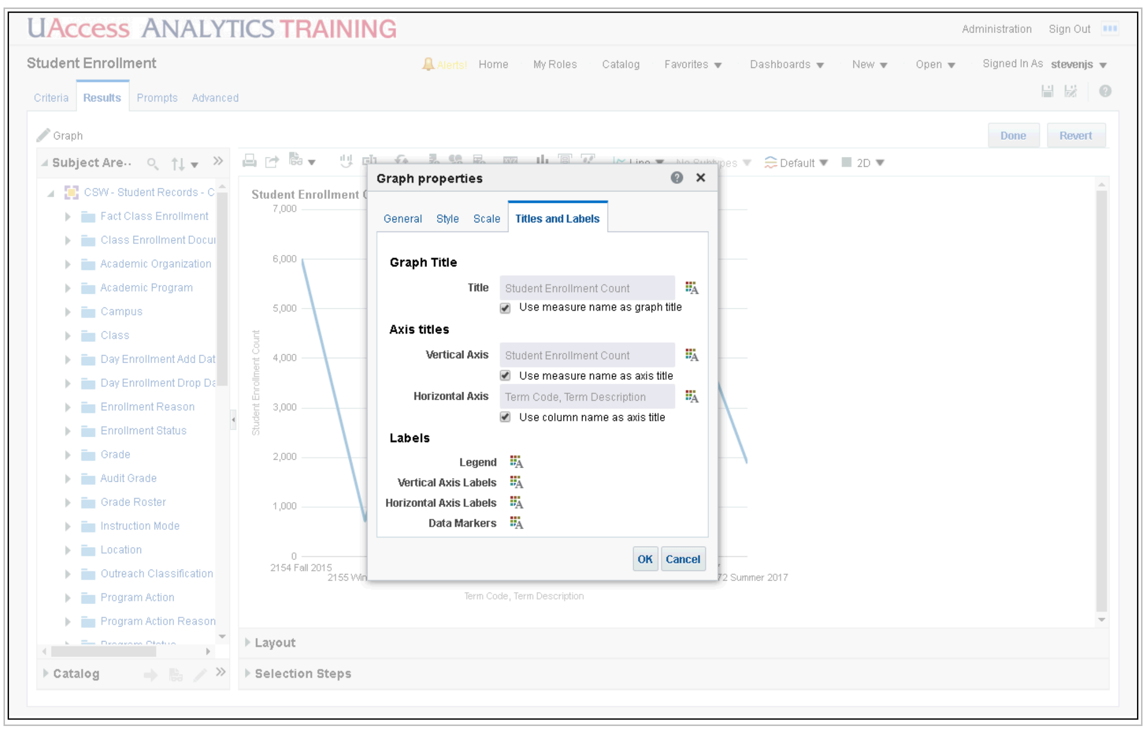


Step	Action
10.	With the Layout pane out of the way, you can see the graph. It's pretty good as it is, but there are a few things you can do that would make it better. You can make the graph taller, remove the graph title, and modify the title on the horizontal axis. All of those things can be done by modifying the graph properties.
11.	The Graph Properties button is near the middle of the button bar, above the graph. Click the **Graph Properties** button. 

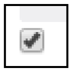


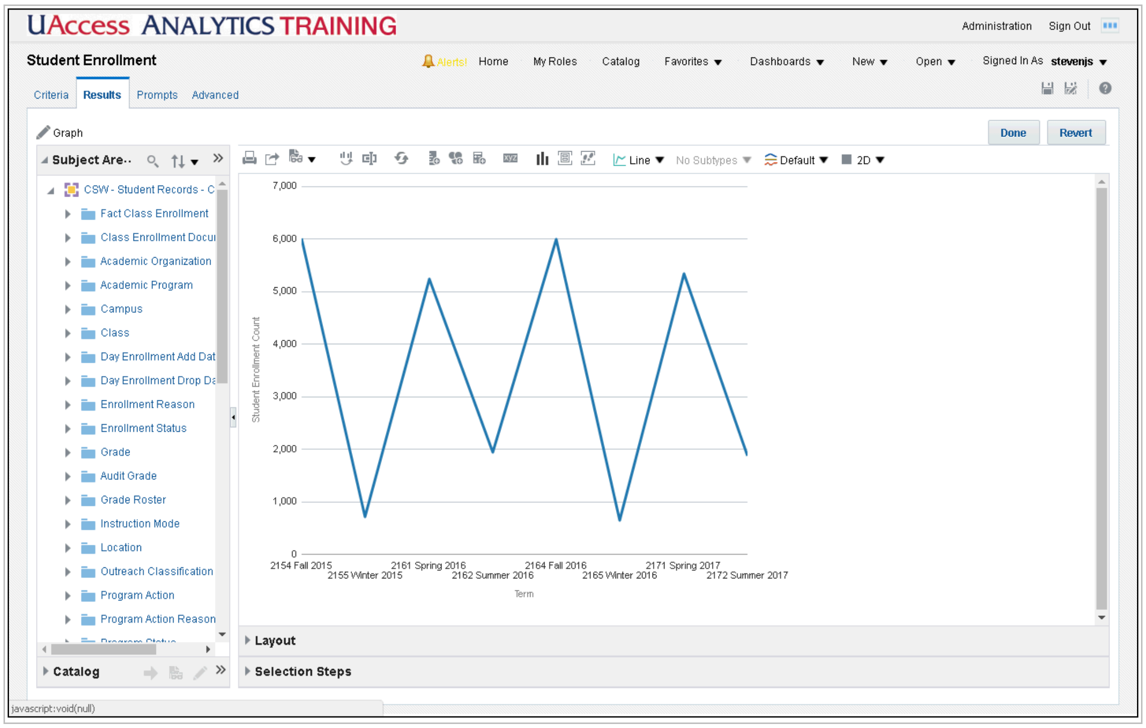
Step	Action
12.	There are four tabs on this screen. You'll use the General tab and the Titles and Labels tab. Change the height of the graph first. Enter "**500**" in the **Canvas Height** field.

Step	Action
13.	Close this screen to see the change you made. Click the **OK** button. OK
14.	The graph is definitely taller. Click the **Graph Properties** button. xyz
15.	Click the **Title and Labels** tab. Titles and Labels

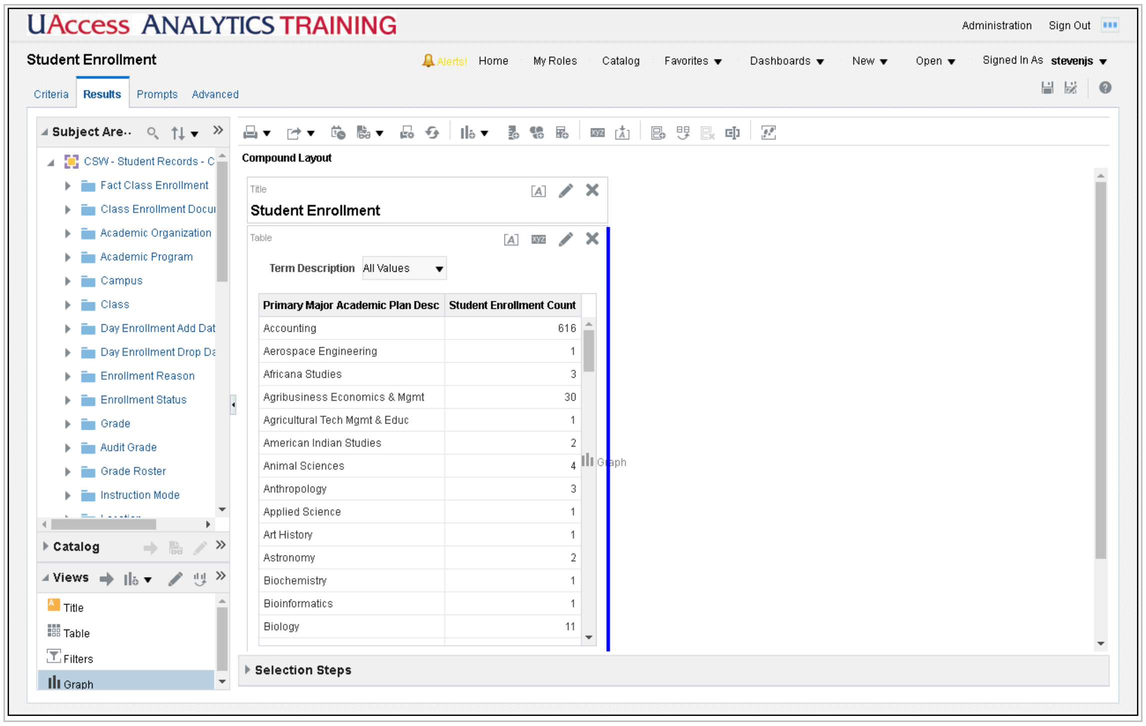


Step	Action
16.	You can remove the graph title. Just uncheck the box and leave the field blank. Click the **Graph Title** checkbox.

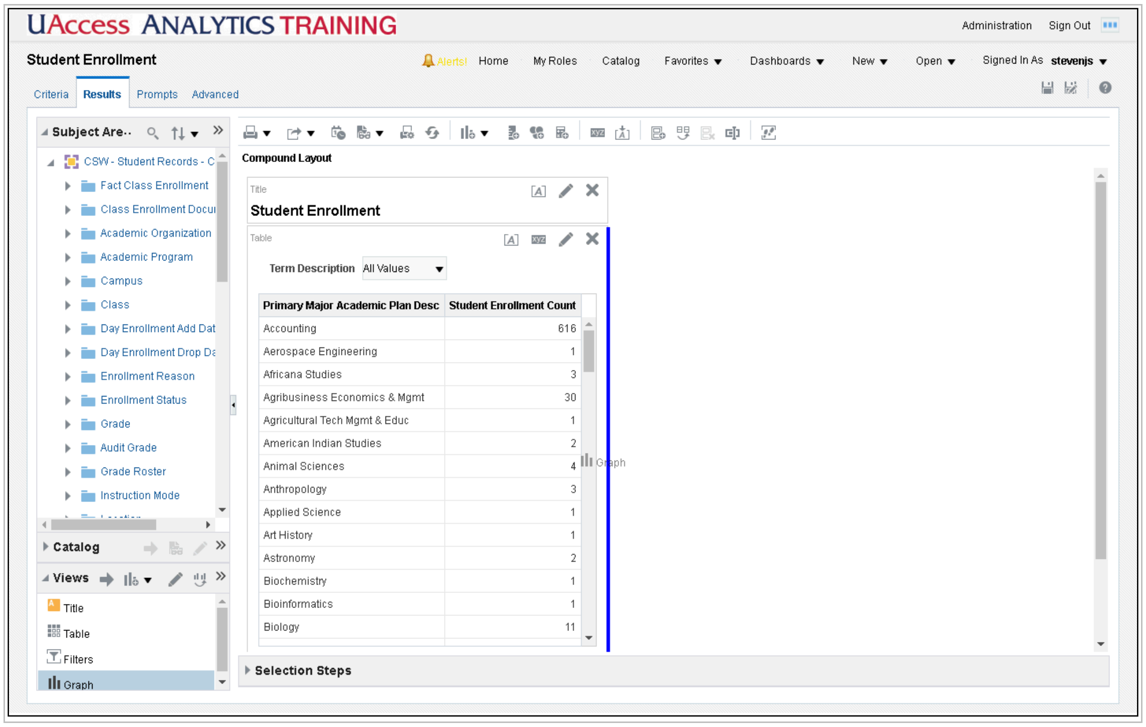
Step	Action
17.	You can change the value for the Horizontal Axis title. Click the **Horizontal Axis** checkbox. 
18.	Enter "**Term**" in the field.
19.	Click the **OK** button. 



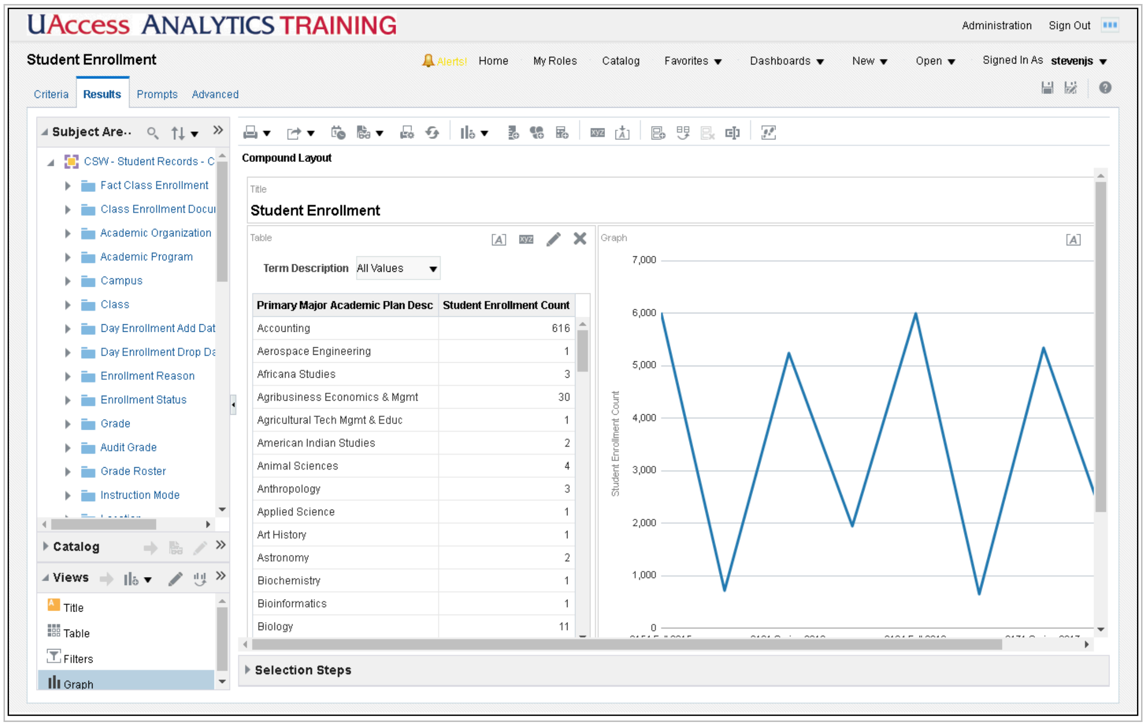
Step	Action
20.	When you've made all of the desired changes -- or all of the changes you're able to make -- you're done. Click the **Done** button. 

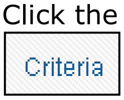
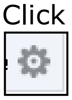
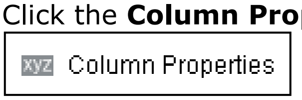
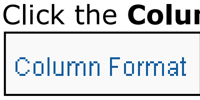


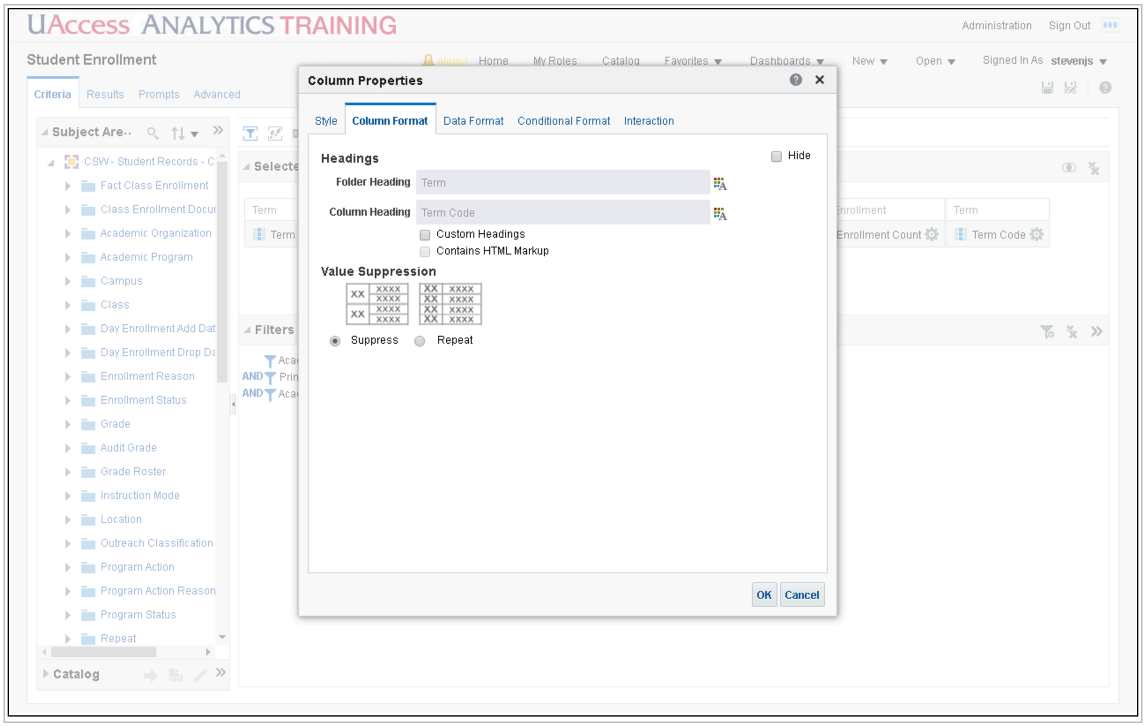
Step	Action
21.	You've created the graph. Now you can drag it from the Views pane into the Compound Layout pane. 

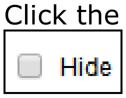
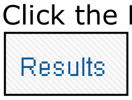


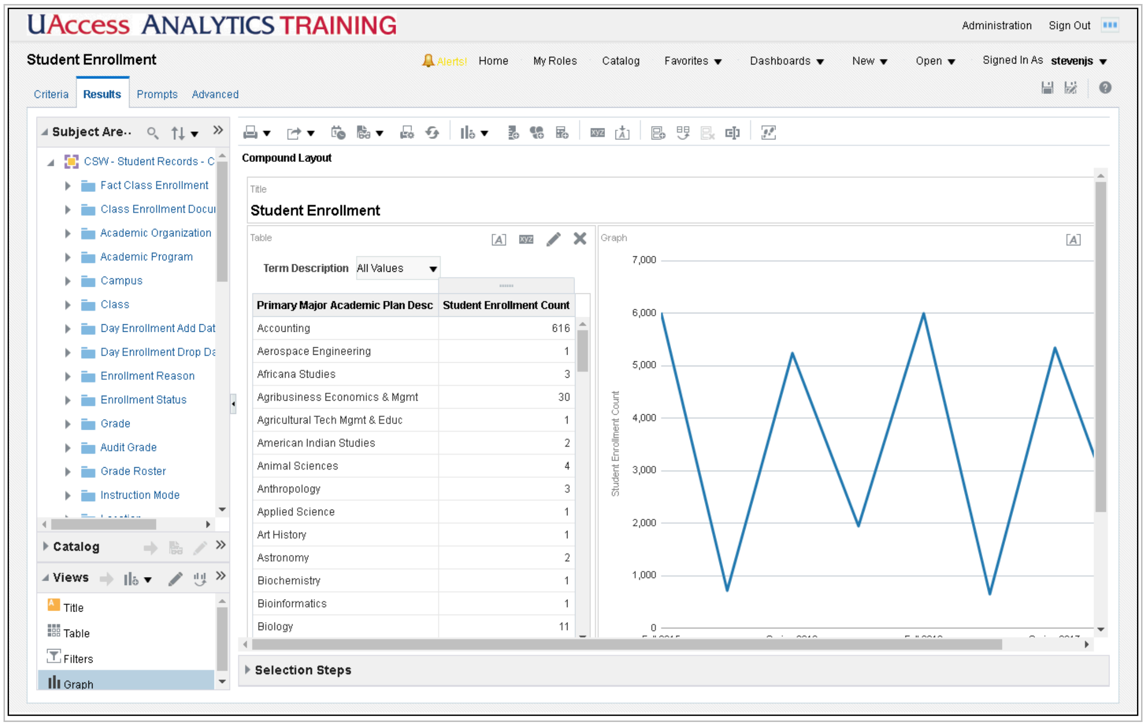
Step	Action
22.	Watch for the blue bar so you'll know when to drop the graph. In this instance, you want the blue bar that's touching the right side of the table. Release the mouse button.



Step	Action
23.	There's your graph in place! Good job! There's one more change you could make, however. What change might you wish to make to the labels on the horizontal axis? Click the **Criteria** tab. 
24.	Removing or hiding the **Term Code** in the graph can only be done by changing the Column Properties for that data column. Click the **Options** button. 
25.	Click the **Column Properties** list item. 
26.	Click the **Column Format** tab. 



Step	Action
27.	The **Hide** checkbox is in the upper right corner. Click the **Hide** checkbox. 
28.	Click the **OK** button. 
29.	Click the **Results** tab. 



Step	Action
30.	You've successfully created, added, and modified the graph. Save the analysis with a new name. Click the **Save As** button. 
31.	The system opened the Save As screen to the correct folder. Now give the analysis a name. Without removing the existing text, just add a few words to the name. Enter " **- Graphed**" in the field.
32.	You could add descriptive text, if you wished. Click the **OK** button. 
33.	That's all there is to adding a graph. **End of Procedure.**

Exercise - Adding a Graph

Scenario: *Your boss likes the analysis you created for her earlier. Now she'd like you to add a graph to the analysis.*

Objectives: The following objectives are intended to be accomplished with minimal input from others. You are, however, allowed and encouraged to ask questions when needed for clarification or direction.

- Add a new graph to the analysis.
- Arrange the data columns properly on the Layout pane.
- Format the graph properly.
- Add the graph to the Compound Layout pane on the Results tab.

Step-by-Step Instructions:

1. **Open** the analysis you created in Exercise 1 - Creating a New Analysis.

2. Add a **New View**: **Graph > Bar > Horizontal**.

3. **Edit** the **graph properties**:

   On the **General** tab:

   a. Increase the height of the graph to **400 pixels**.

   b. Move the **legend** and put it above the graph.

   On the **Titles and Labels** tab:

   c. Remove the **graph title**.

   d. Modify the **vertical axis title** to read "**Colleges**."

   e. Modify the **horizontal axis title** to read "**Counts**."

   f. Click **Done**.

4. **Move** the Graph View into the Compound Layout pane. Place it on the right side of the Table View.

5. **Save** the modified analysis in your **Basic Workshop** folder as **College Employee Headcount/FTE Comparison with Graph.**

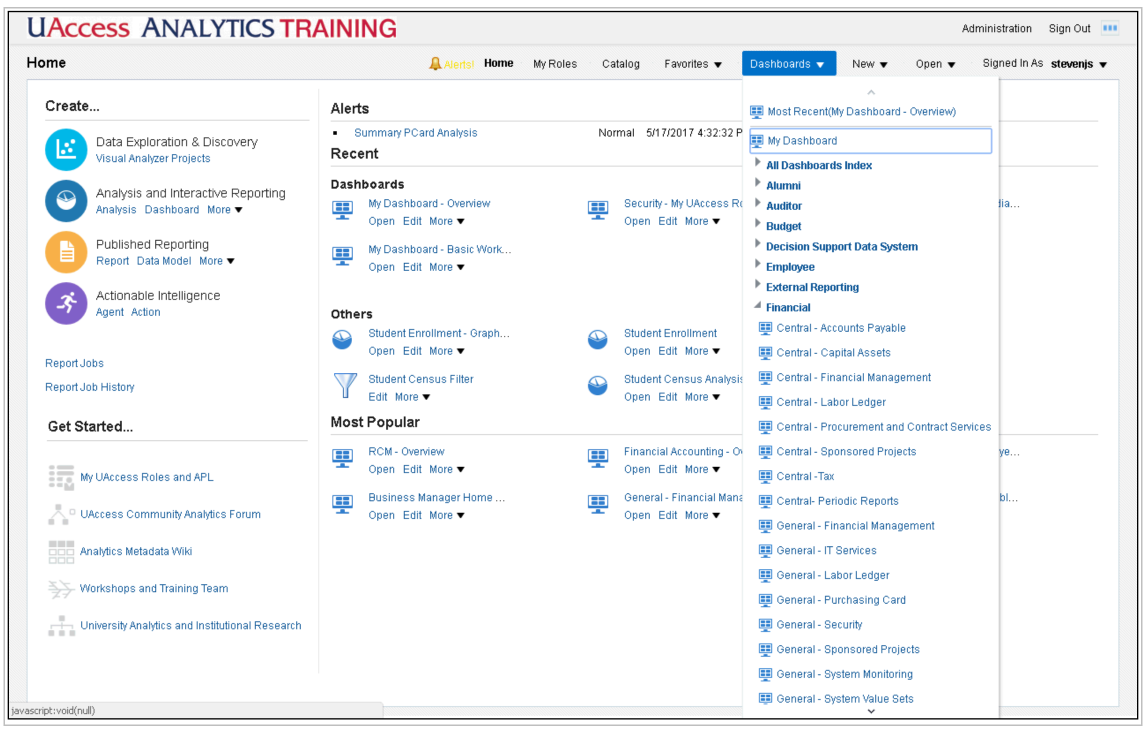
Working with Dashboards

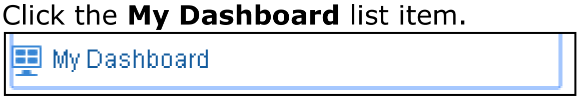
Creating a New Dashboard

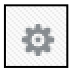
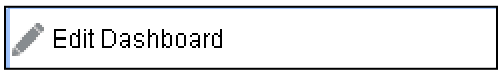
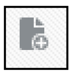
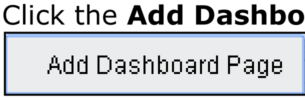
Procedure

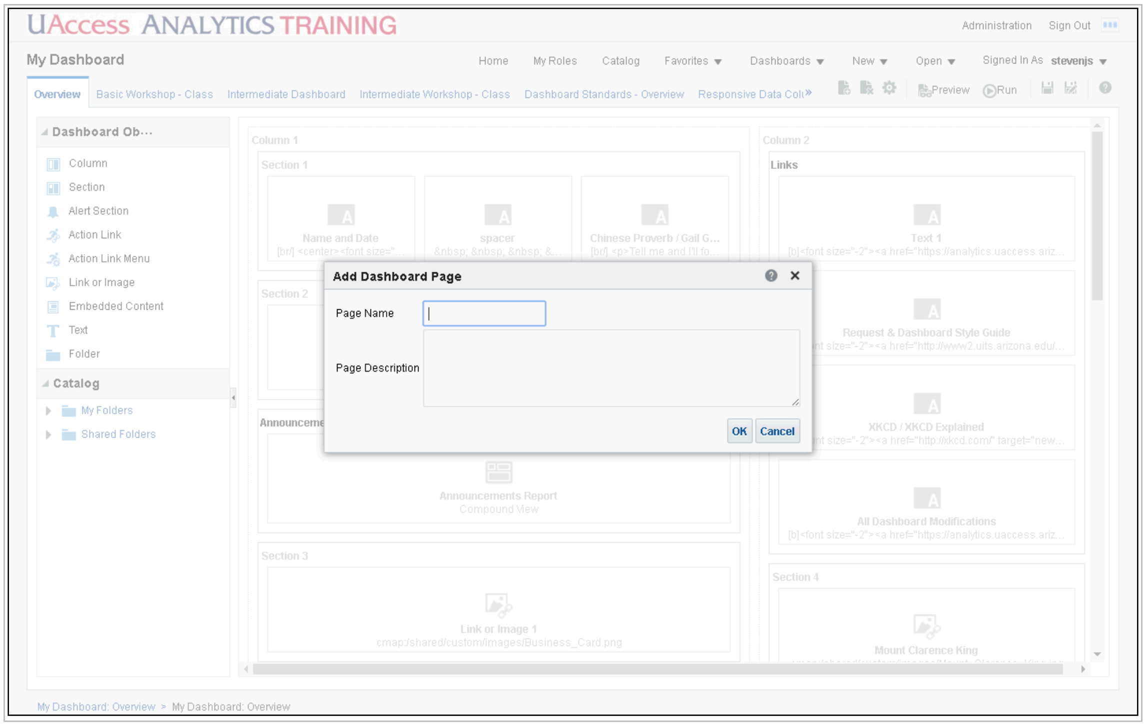
You've created four analyses. It's time to put them all together on your personal dashboard.

Step	Action
1.	Click the **Dashboards** link. 

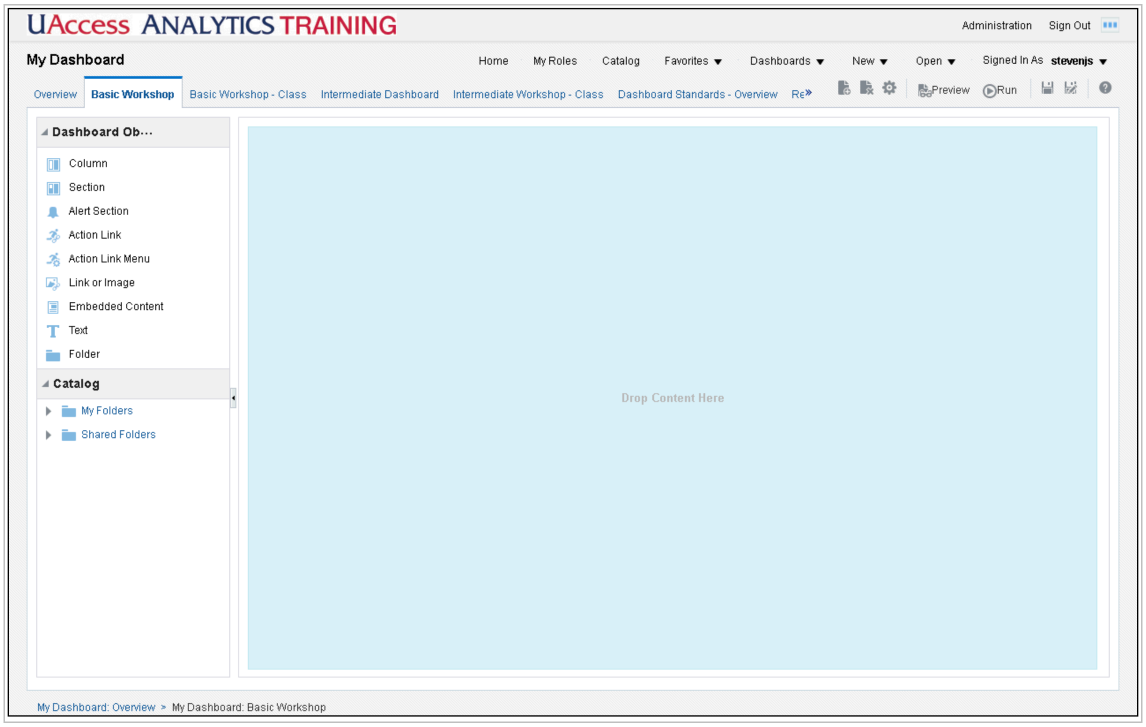


Step	Action
2.	Click the **My Dashboard** list item. 

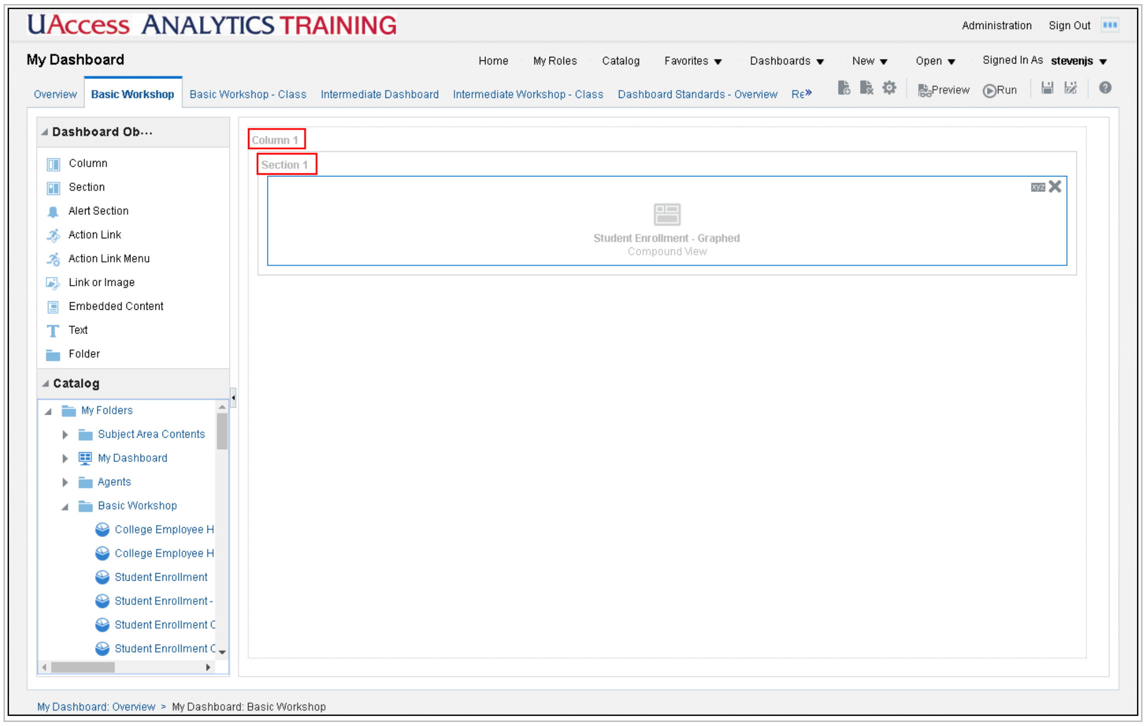
Step	Action
3.	You may already have a number of dashboard pages created, or you may have a completely empty dashboard. Regardless, you will add a new page. If you are starting on an empty dashboard, you can simply click the Edit button in the center of the page. You could also start with the Page Options button. Click the **Page Options** button. 
4.	Click the **Edit Dashboard** list item. 
5.	Click the **New Page** button. 
6.	You have the ability to either add pages or to add subpages to existing pages. We're going to add a new page. *Note: For more information, review the* ***Working with Dashboards: Creating Pages and Subpages*** *document from the UAccess Community > Resources > Analytics web page.* Click the **Add Dashboard Page** list item. 

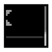


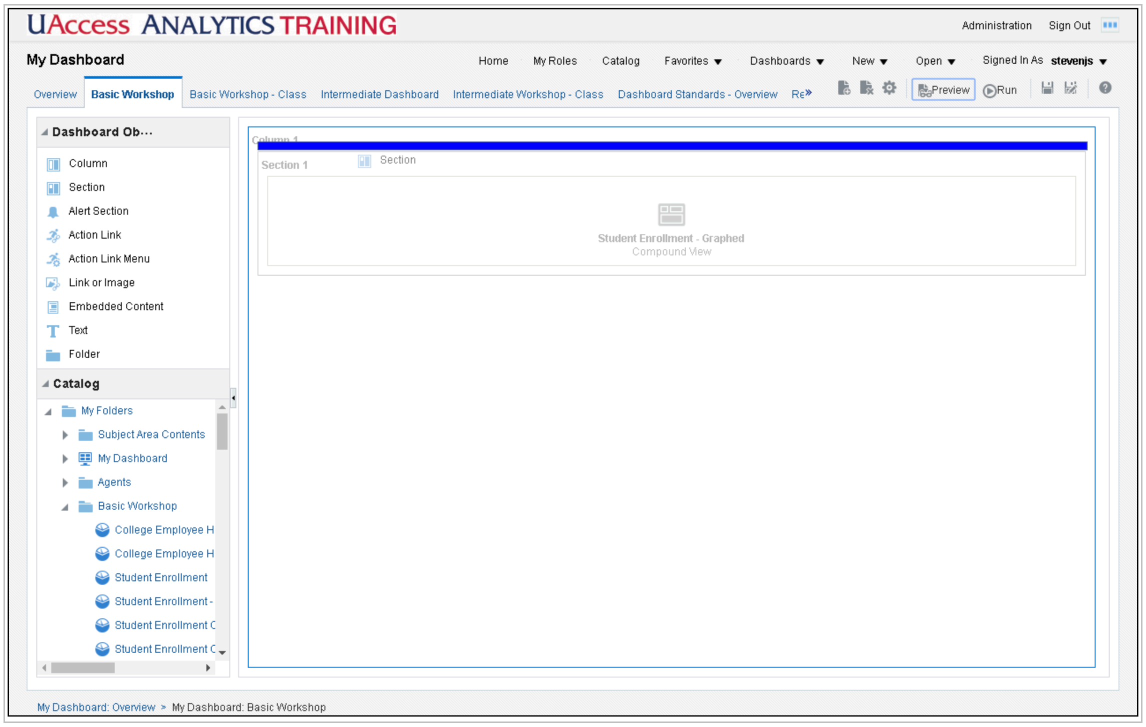
Step	Action
7.	Enter "**Basic Workshop**" in the field.
8.	Click the **OK** button. 



Step	Action
9.	When you create a new dashboard page, that page is completely empty. On the left, you can see a Dashboard Objects pane. You could begin by adding empty columns, sections, or other items to the blank dashboard. You can also see a Catalog pane on the left. You could also simply add the desired content.
10.	Where can you find the four analyses you created? Click the **My Folders** dropdown button to activate the menu.
11.	Now locate and open the **Basic Workshop** folder. Click the **Basics Workshop** dropdown button to activate the menu.
12.	Grab the **Student Enrollment - Graphed** item from the **Basic Workshop** folder, drag it into your empty dashboard, and drop it. Release the mouse button.

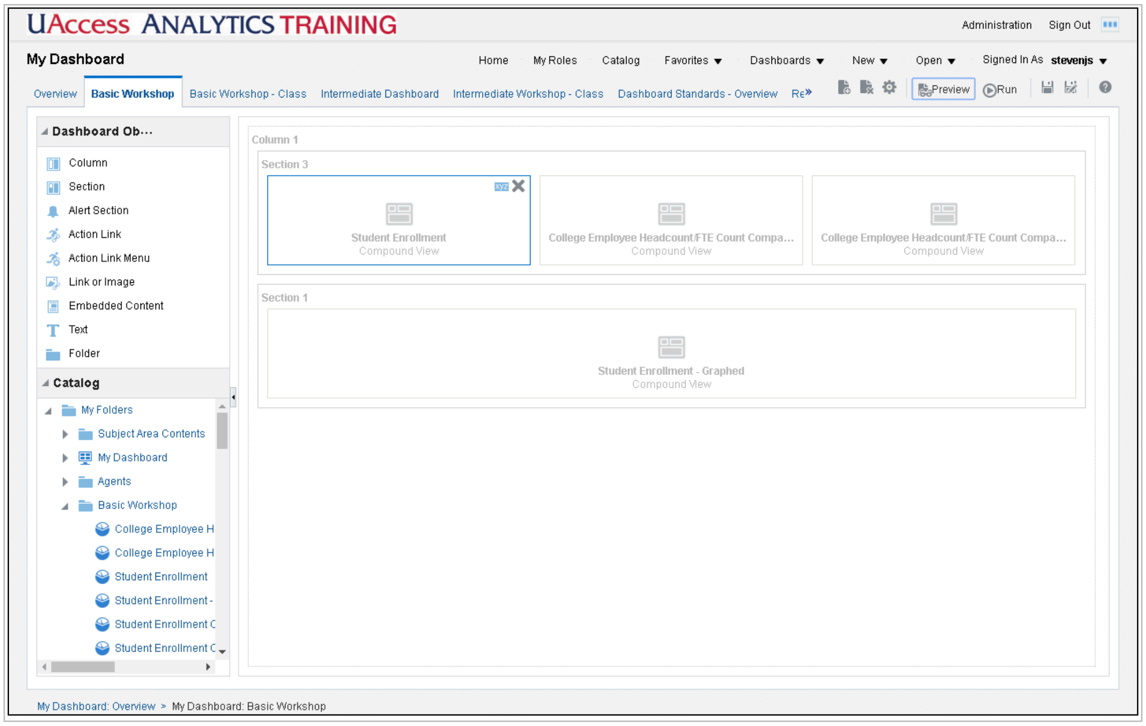


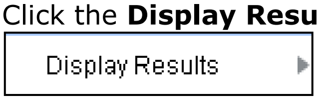
Step	Action
13.	When you drag any item from the Catalog pane onto an empty dashboard or a new position on an existing dashboard, the system brings a section and a column along with that item. Sections and columns are dashboard objects that could be added manually from the Dashboard Objects pane. Anything added to a dashboard must be in a section, and any section must be in a column.
14.	Take a look at what you've created so far. Click the **Preview** button. 
15.	There's the analysis as it will look on the dashboard you're creating. Click the **Close** button. 

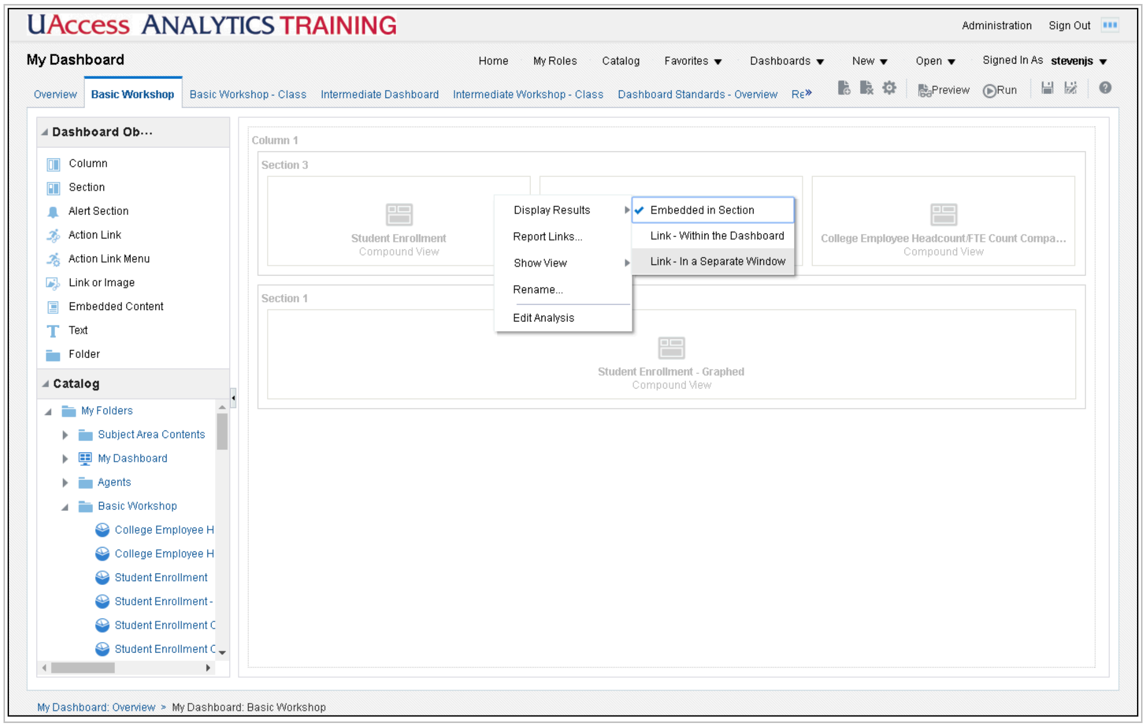


Step	Action
16.	Now you need to add the remaining analyses to the dashboard. You want them to appear next to each other, as links, at the top of the dashboard page. To accomplish that, start by adding a new Section to the dashboard. Place the new section above the existing section. Watch for the blue line to know when you're adding the Object to the right spot on the dashboard. Release the mouse button.
17.	Now add the three remaining analyses, one by one. Start with the **Student Enrollment** analysis. Release the mouse button.
18.	Next, bring in one of the Employee-based analyses. Drop it to the right of the existing analysis. Release the mouse button.
19.	Line them up next to each other across the dashboard. Watch for the blue line so you know you're about to drop the object to the right of the existing analysis. Release the mouse button.

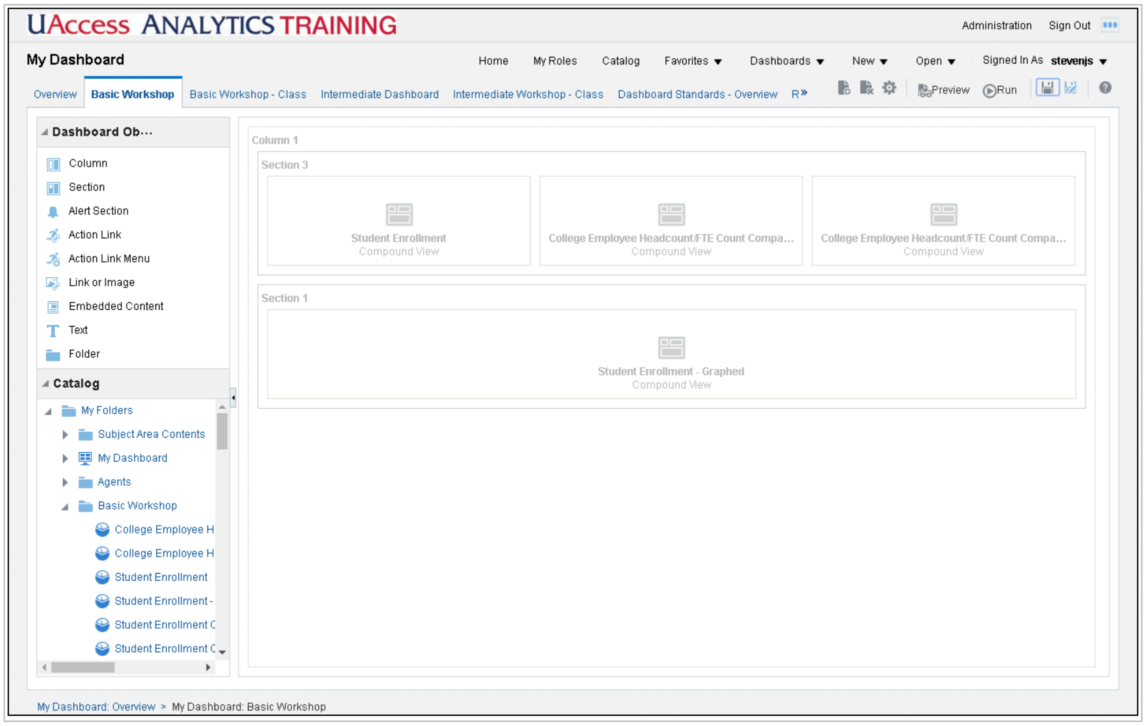
Step	Action
20.	With all three of your analyses in the upper section, you're done adding things to the dashboard. If you stop working now, however, those reports will be displayed on the dashboard as-is. You need to turn those reports into links that will open on a new page when clicked.



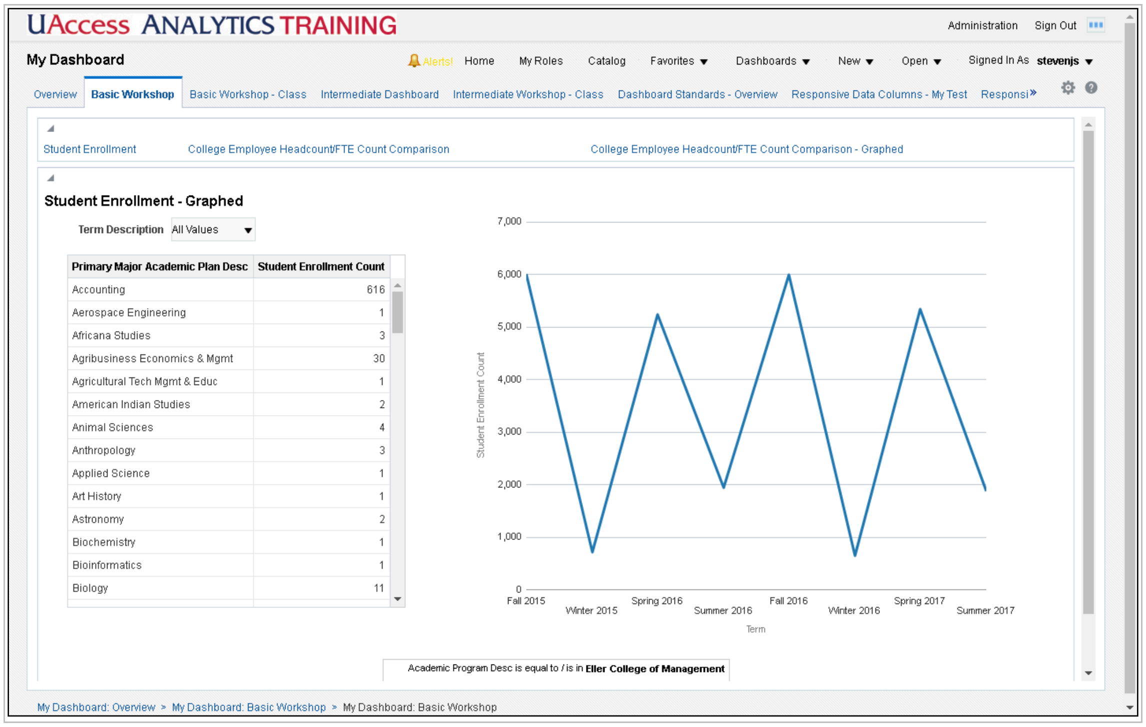
Step	Action
21.	Start with the Student Enrollment analysis on the left. When you hover over that analysis, a two-button menu bar appears. Click the **Properties** button. 
22.	Change the way the results are displayed. Click the **Display Results** link. 



Step	Action
23.	Click the **Link - In a Separate Window** link. 
24.	Repeat the process for the next two analyses. Click the **Properties** button. 
25.	Click **Display Results**, then Click the **Link - in a Separate Window** list item. 
26.	Repeat the "make it a link" procedure with the third analysis, then save the dashboard. You don't even have to name it. Click the **Save** button. 



Step	Action
27.	Let's see what it looks like! Click the **Run** button. 

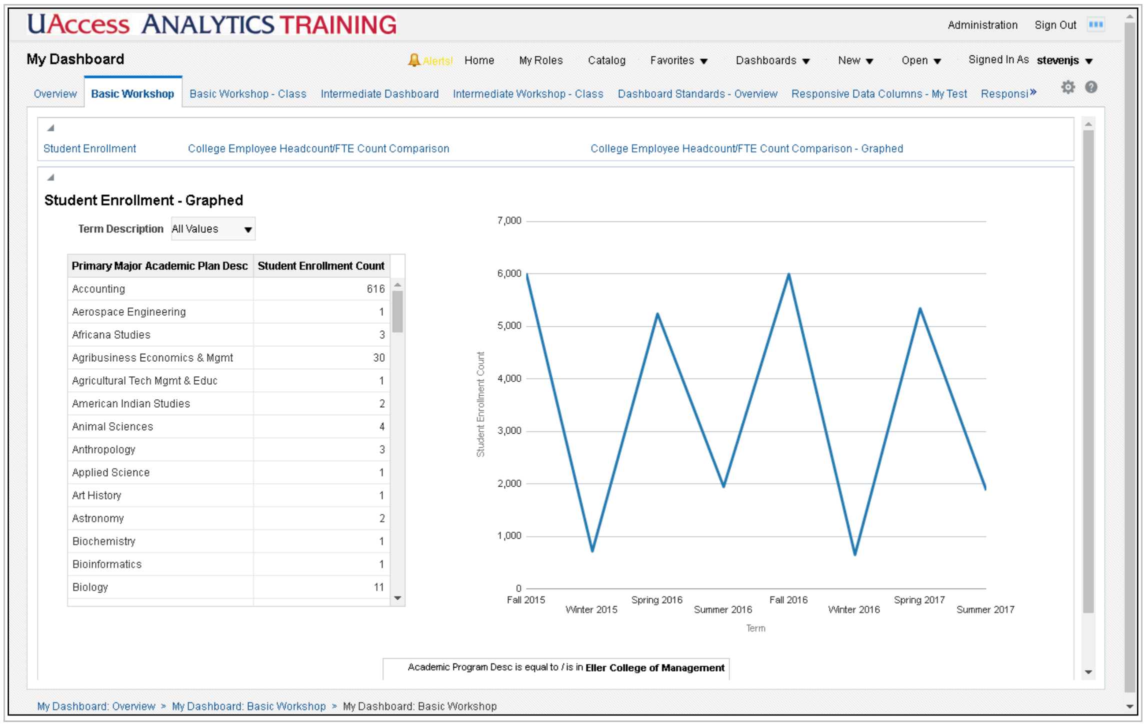


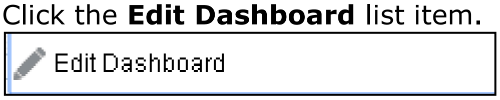
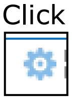
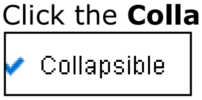
Step	Action
28.	You've created a basic dashboard page. Congratulations!
29.	Notice the links across the top. Try one out. Click the **College Employee Headcount/FTE Position Count Comparison - Graphed** link.
30.	The analysis opens on another page. Perfect. Click the **Return** link.
31.	Your basic dashboard is complete. There are three analyses positioned as links across the top of the page, and one analysis visible on the page. Great! **End of Procedure.**

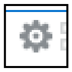
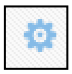
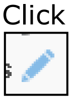
Editing a Dashboard

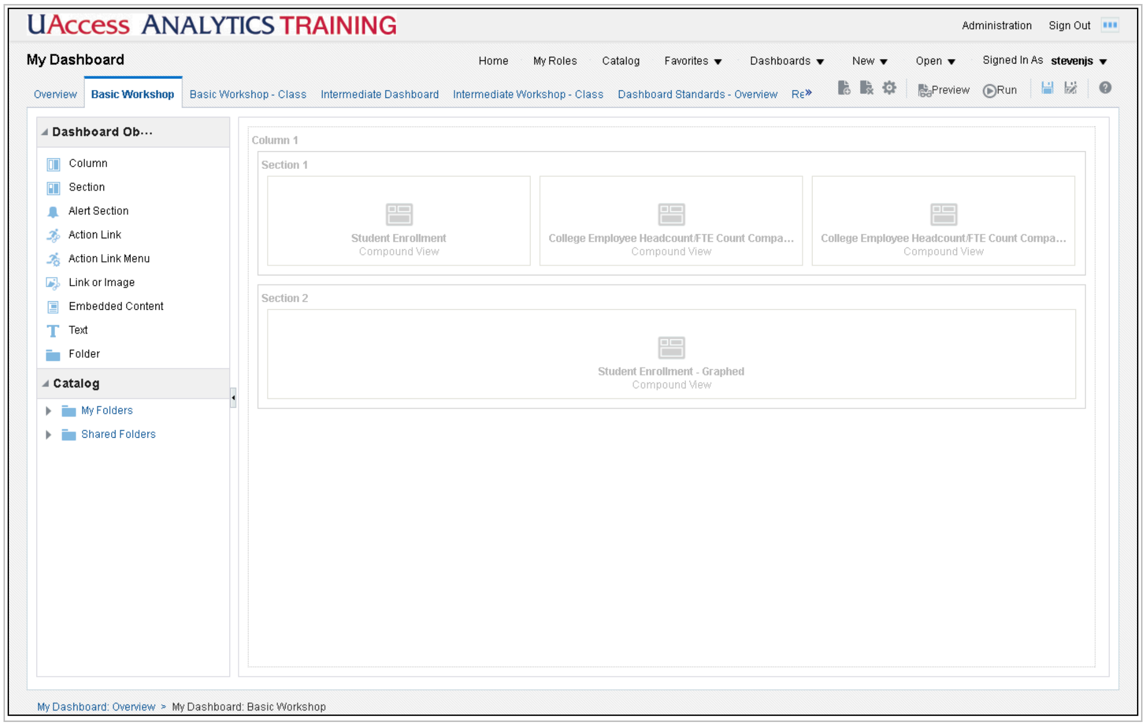
Procedure

There are a few modifications you can make that will help you as you work with your dashboard.

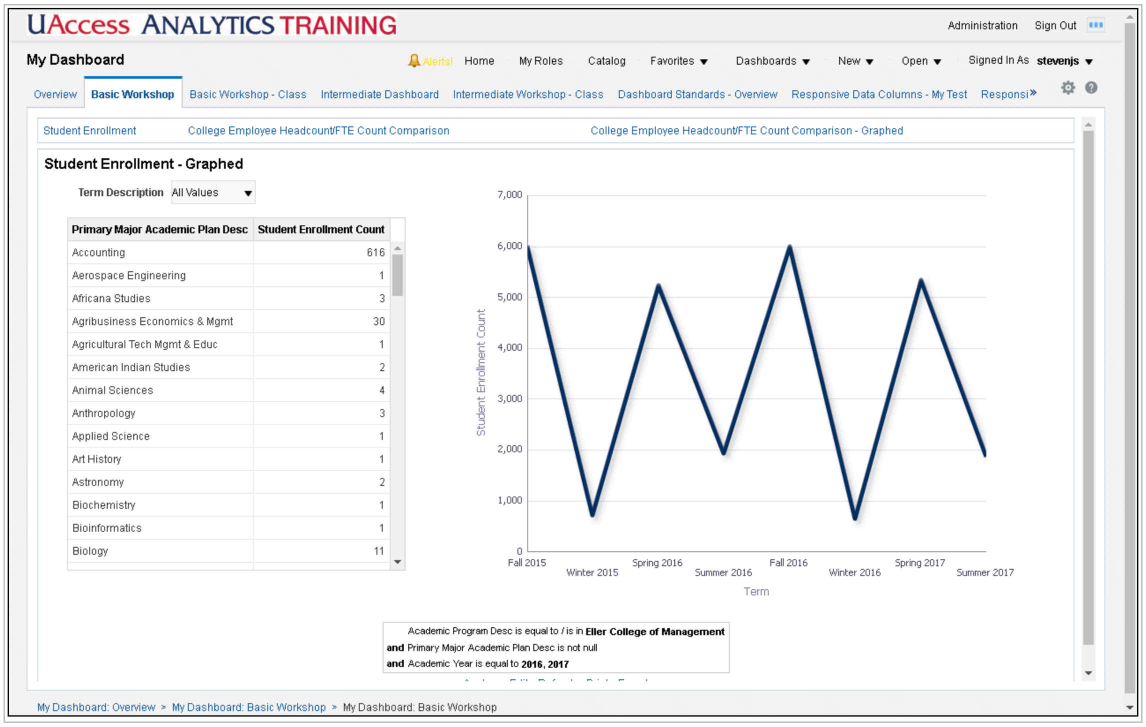


Step	Action
1.	If you look in the upper-left corners of the two sections, you can see little Collapse buttons. Those aren't necessary. You can remove them. Click the **Page Options** button. 
2.	Click the **Edit Dashboard** list item. 
3.	Hover your mouse over **Section 1** so you can see the small button bar in the upper-right corner. Click the **Properties** button. 
4.	Click the **Collapsible** list item. 

Step	Action
5.	Repeat the procedure for **Section 2**. Click the **Properties** button. 
6.	Click the **Collapsible** list item. 
7.	You might also wish to add some links to your dashboard pages. Click the **Tools** button. 
8.	Click the **Dashboard Properties** list item. 
9.	You can give your dashboard a description, if you'd like. You can also make sure it's set to fill your browser window. To add the links, you need to edit the Dashboard Report Links. Click the **Edit Dashboard Report Links** button. 
10.	Make sure to check the first five options: **Analyze**, **Edit**, **Refresh**, **Print**, and **Export**. Click the **OK** button. 
11.	Click the **OK** button. 



Step	Action
12.	Those are all the changes you need make. Click the **Save** button. 
13.	Once the dashboard has been saved - watch for the word "Saved" to appear just to the left of the button bar - you can run the dashboard. Click the **Run** button. 



Step	Action
14.	The updated dashboard is displayed, and those Collapse buttons have been removed.
15.	If you need to do so, scroll down just a bit. You'll see those links have been added to the bottom of the dashboard page.
16.	**End of Procedure.**

Review - Working with Dashboards

Answer the following:

1. You are the only person who has access to your ____________________ dashboard.
2. To add a new page to any dashboard, you must first edit that dashboard. To start editing, you should click the ____________________ button.
3. When you add a new item from the Catalog pane to an empty dashboard, the system also adds a ____________________ and a ____________________.
4. **True** **False** The Analyze, Edit, Refresh, Print, and Export links are automatically added to any item you add to a dashboard.
5. **True** **False** When you save a dashboard for the first time, you must give it an appropriate name.
6. **True** **False** This was fun.

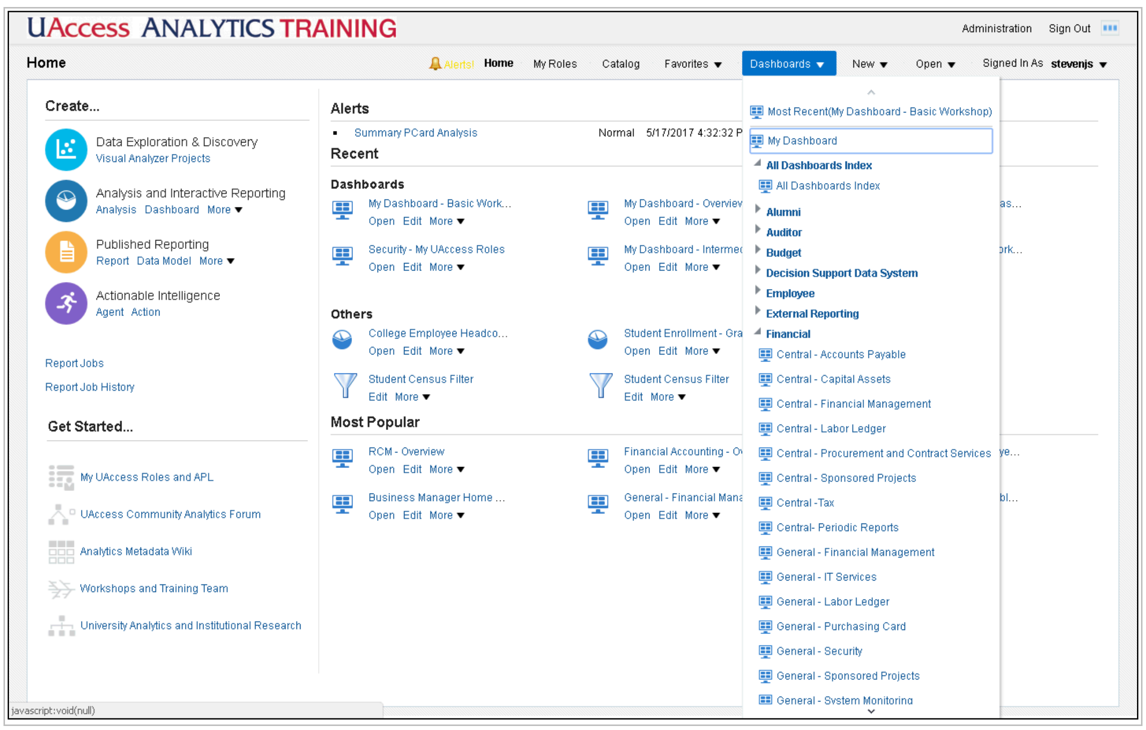
Appendix A

Working with Dashboard Functionality

Procedure

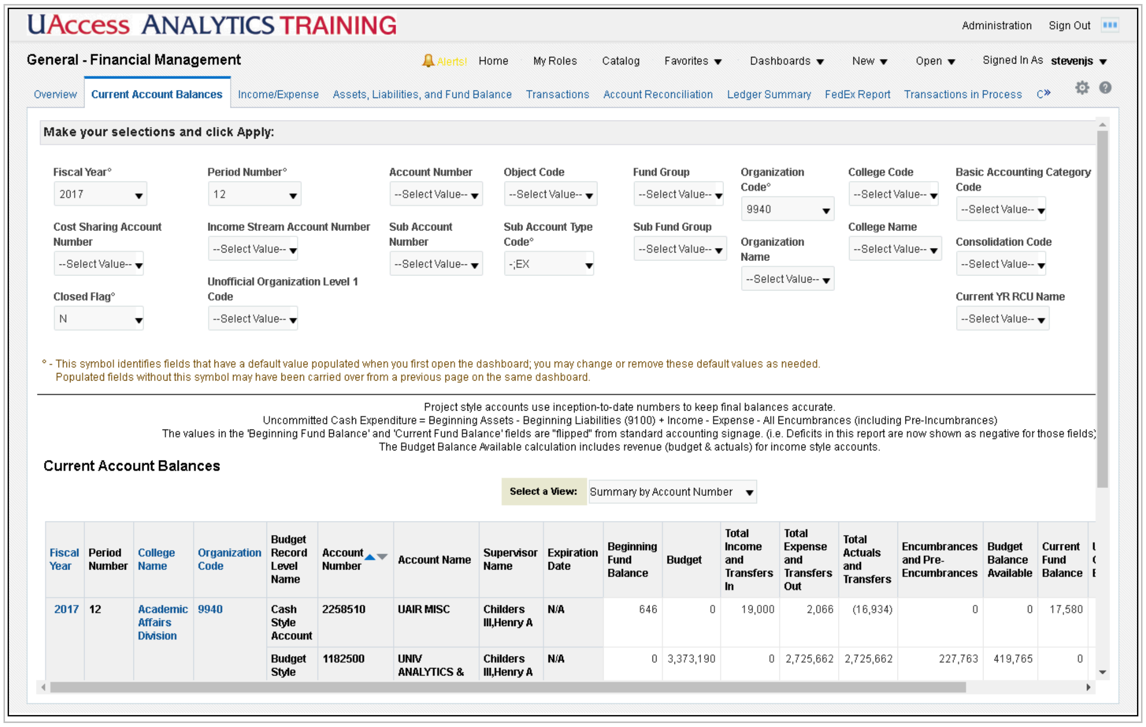
Very often, you'll be working with shared analyses and dashboards. Those dashboards have a lot of available functions you should know about.

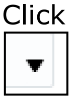
Step	Action
1.	Click the **Dashboards** dropdown button to activate the menu. Dashboards ▼

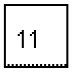
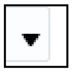


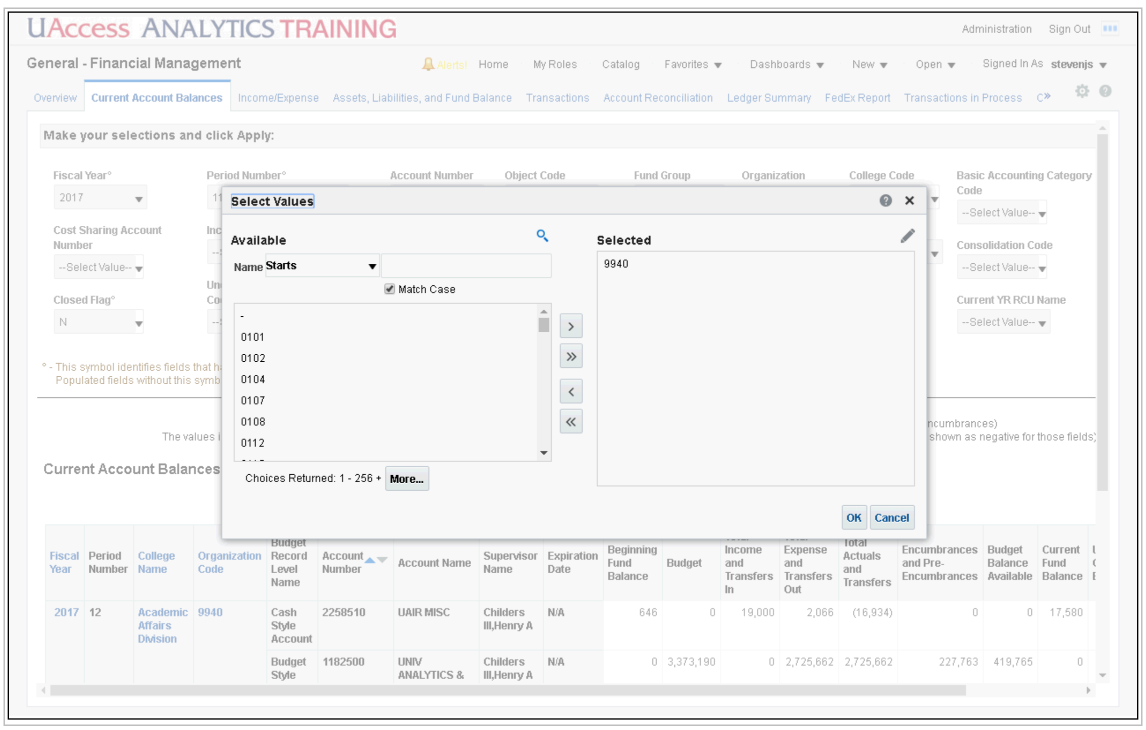
Step	Action
2.	Use one of the Financial dashboards. The functions you will apply there can be applied to any dashboard. Click the **General - Financial Management** list item. General - Financial Management

Step	Action
3.	You will always land on an Overview page when using a shared dashboard, and there are typically many different pages of data available to you. Click the **Current Account Balances** tab. 

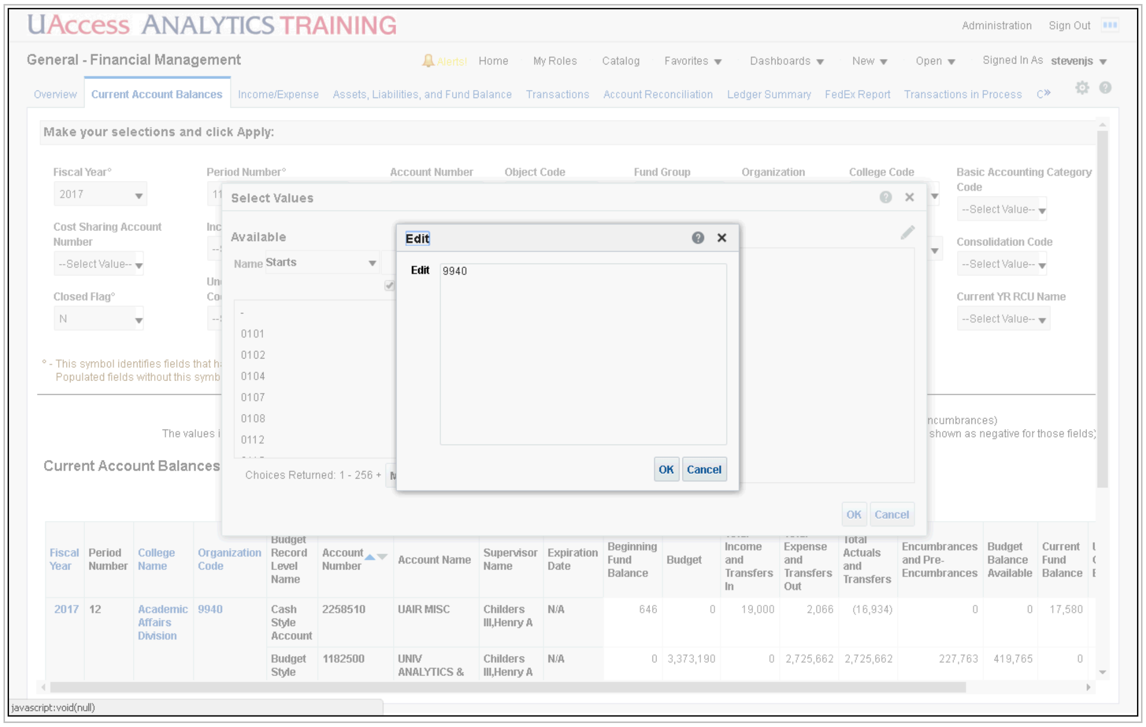


Step	Action
4.	Every shared dashboard page has a dashboard prompt available for your use. Some of the prompt fields have default values already plugged in. Many are left blank. You can enter any applicable criteria you wish into as many or as few prompt fields as you need.
5.	In this example, the Fiscal Period prompt field is set to period 12. You can change that to a different fiscal period.
6.	Click the **Period Number** dropdown button to activate the menu. 

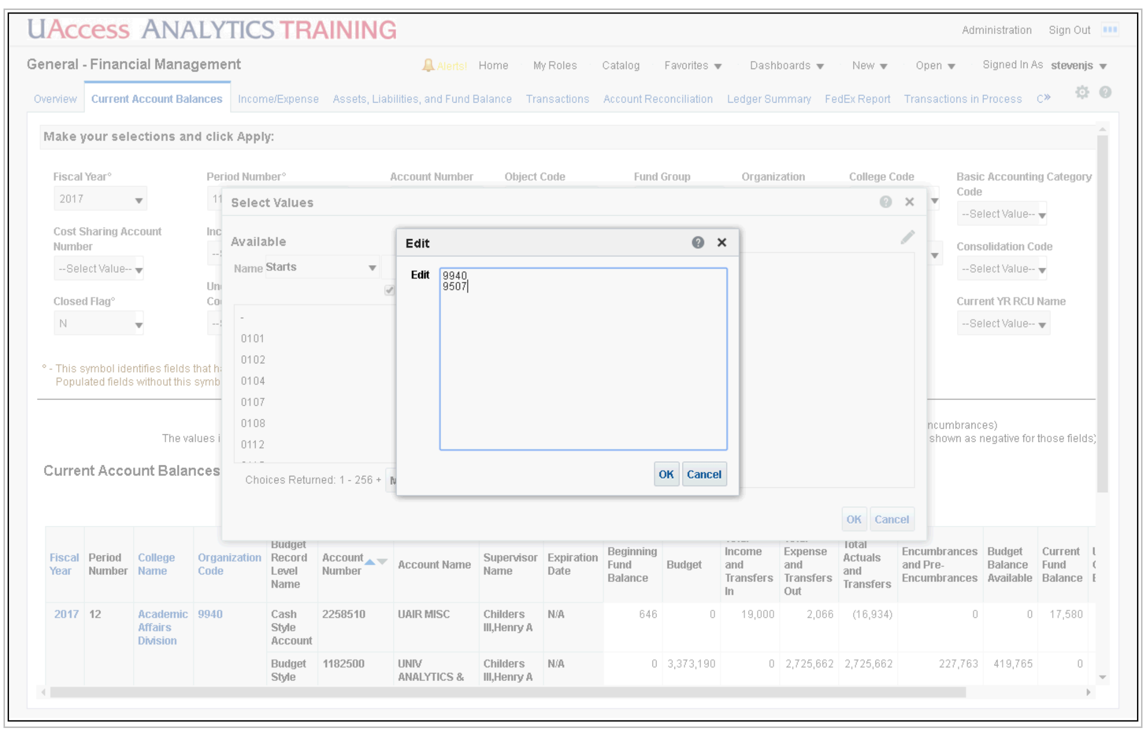
Step	Action
7.	Click the **Period 11** list item. 
8.	You could also add more Organization Codes to the prompt field. Click the **Organization Code** dropdown button to activate the menu. 
9.	Although you might be able to select from the list, sometimes it's easier to use the Search link. Click the **More/Search...** list item. 



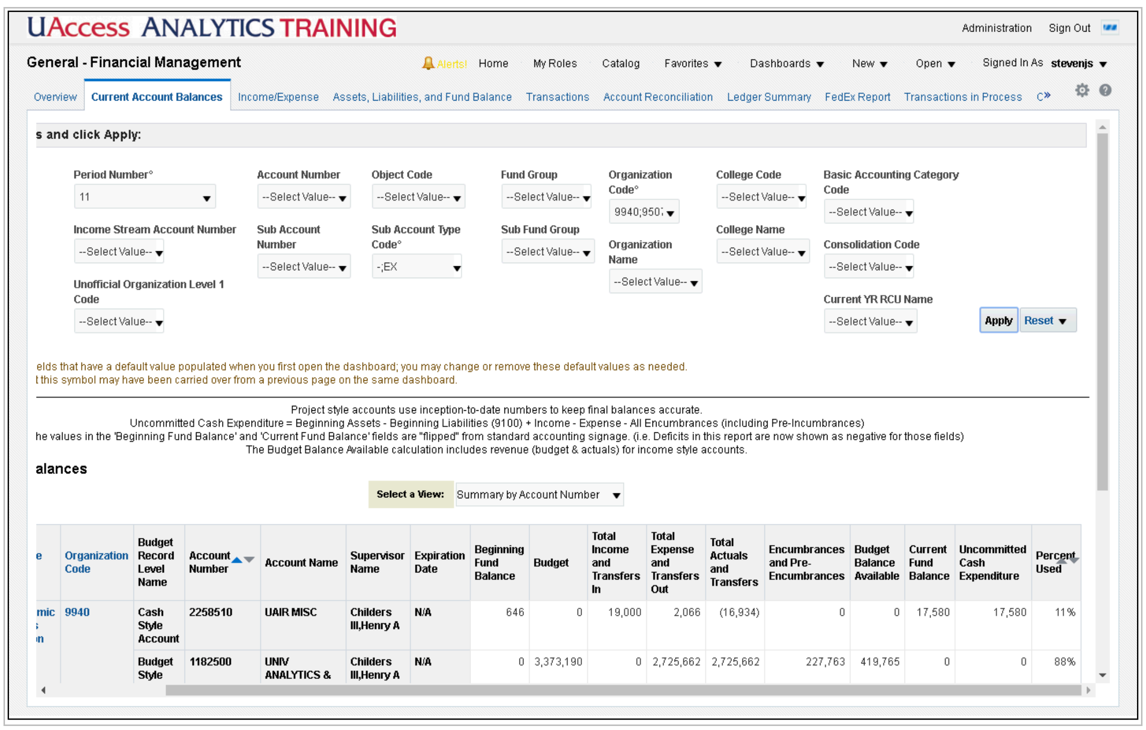
Step	Action
10.	Once again, you could use the list on the left. Sometimes, it's easier to simply enter the values you need in the **Selected** pane. Click the **Edit** button. 

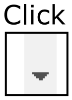


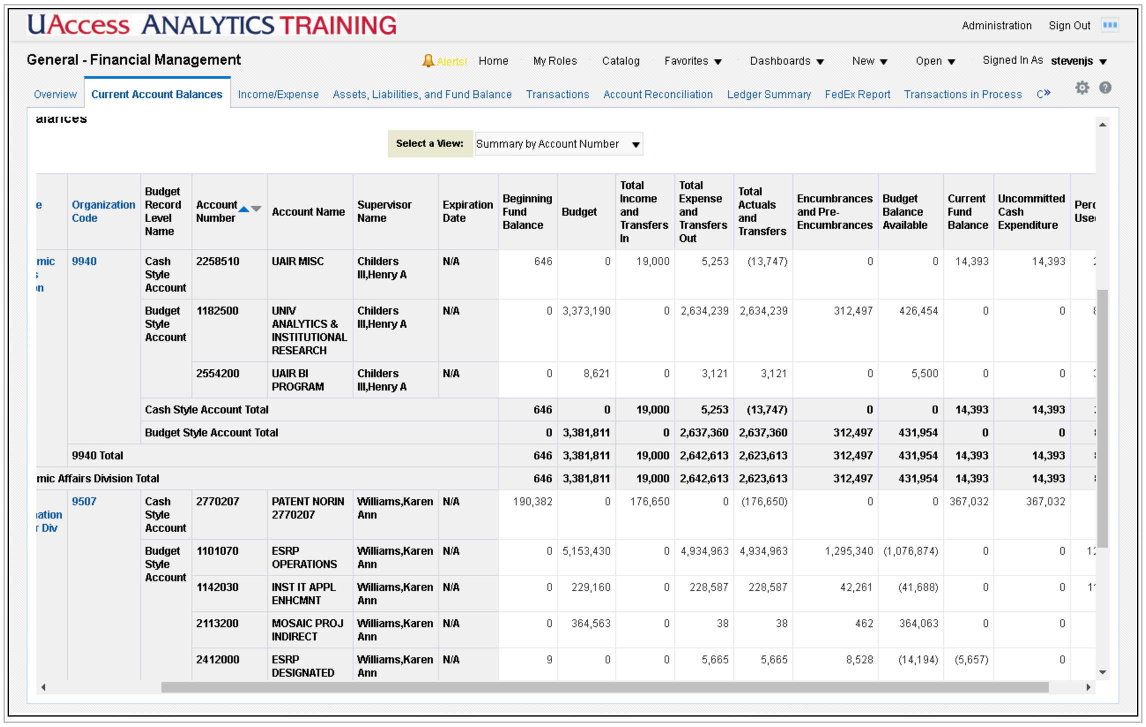
Step	Action
11.	Enter "**9507**" in the **Edit** field.



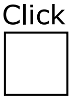
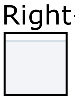
Step	Action
12.	Click the **OK** button. 
13.	Click the **OK** button. 
14.	Now that you've entered the desired values, you must re-run the dashboard. Click the **Apply** button. 

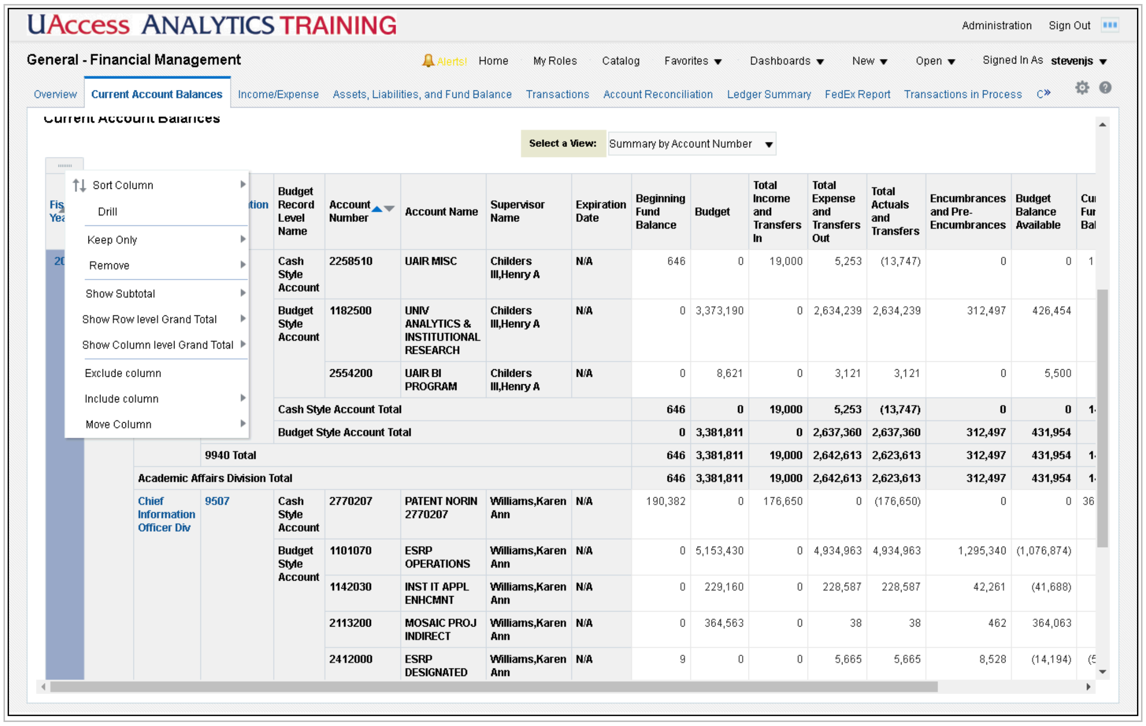


Step	Action
15.	Scroll down to see the full analysis. Click the **Down** button of the scrollbar. 



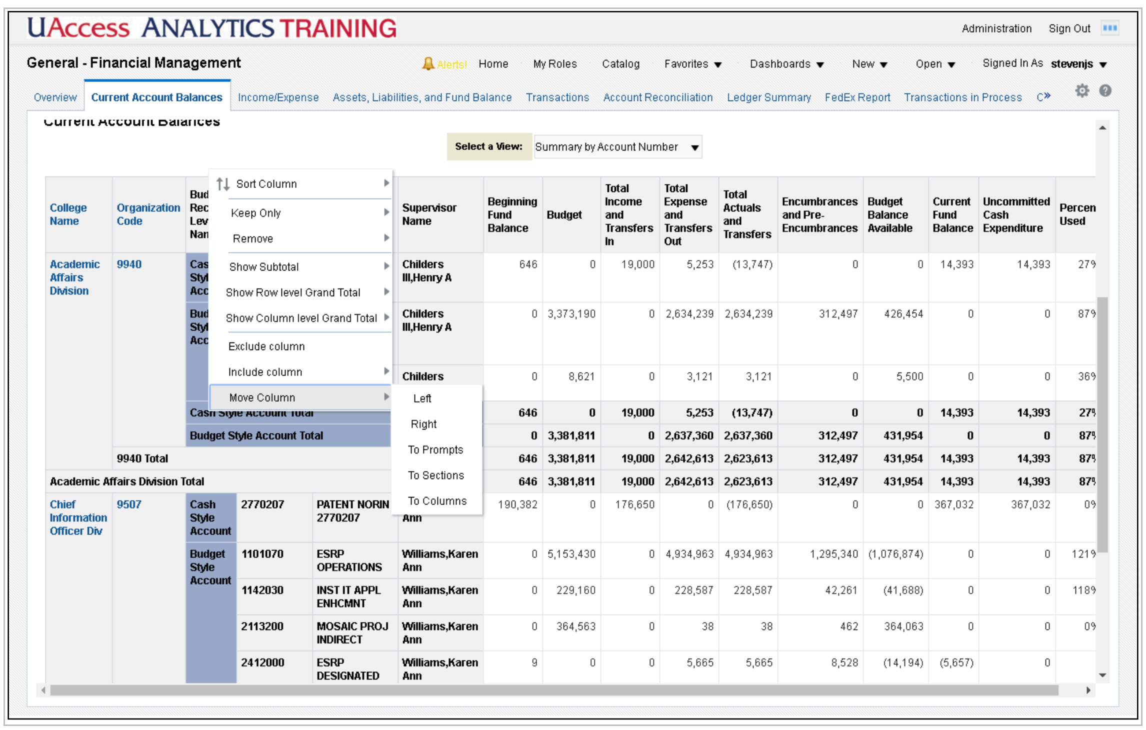
e	Organization Code	Budget Record Level Name	Account Number	Account Name	Supervisor Name	Expiration Date	Beginning Fund Balance	Budget	Total Income and Transfers In	Total Expense and Transfers Out	Total Actuals and Transfers	Encumbrances and Pre-Encumbrances	Budget Balance Available	Current Fund Balance	Uncommitted Cash Expenditure	Perc Use
mic ; n	9940	Cash Style Account	2258510	UAIR MISC	Childers III,Henry A	N/A	646	0	19,000	5,253	(13,747)	0	0	14,393	14,393	
		Budget Style Account	1182500	UNIV ANALYTICS & INSTITUTIONAL RESEARCH	Childers III,Henry A	N/A	0	3,373,190	0	2,634,239	2,634,239	312,497	426,454	0	0	
			2554200	UAIR BI PROGRAM	Childers III,Henry A	N/A	0	8,621	0	3,121	3,121	0	5,500	0	0	
		Cash Style Account Total					646	0	19,000	5,253	(13,747)	0	0	14,393	14,393	
		Budget Style Account Total					0	3,381,811	0	2,637,360	2,637,360	312,497	431,954	0	0	
	9940 Total						646	3,381,811	19,000	2,642,613	2,623,613	312,497	431,954	14,393	14,393	
mic Affairs Division Total							646	3,381,811	19,000	2,642,613	2,623,613	312,497	431,954	14,393	14,393	
ation r Div	9507	Cash Style Account	2770207	PATENT NORIN 2770207	Williams,Karen Ann	N/A	190,382	0	176,650	0	(176,650)	0	0	367,032	367,032	
		Budget Style Account	1101070	ESRP OPERATIONS	Williams,Karen Ann	N/A	0	5,153,430	0	4,934,963	4,934,963	1,295,340	(1,076,874)	0	0	
			1142030	INST IT APPL ENHCMNT	Williams,Karen Ann	N/A	0	229,160	0	228,587	228,587	42,261	(41,688)	0	0	
			2113200	MOSAIC PROJ INDIRECT	Williams,Karen Ann	N/A	0	364,563	0	38	38	462	364,063	0	0	
			2412000	ESRP DESIGNATED	Williams,Karen Ann	N/A	9	0	0	5,665	5,665	8,528	(14,194)	(5,657)	0	

Step	**Action**
16.	Sometimes you're able to select from a list of views. Click the **Select a View** dropdown button to activate the menu. 
17.	There are quite a few different views, but the default view will work for you. You can collapse the menu. Click the **Analysis** pane. 
18.	There are quite a few data columns in this analysis. It's possible that you might not need or want all of those columns, or that you might want them to be arranged differently. You can make that happen!
19.	Since the Filters view at the bottom of the analysis shows that this analysis has been filtered to Fiscal Year 2017, you could remove that data column. Right-click the **Fiscal Year** column header. 

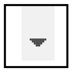


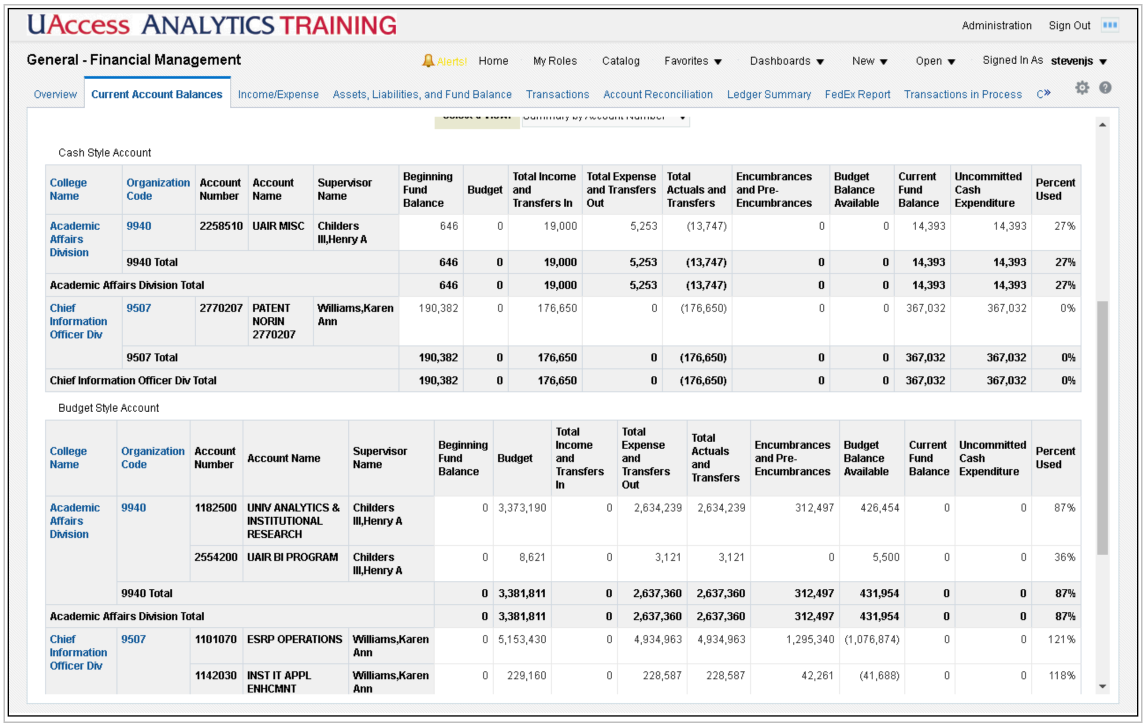
Step	Action
20.	You can remove that column from this view. Click the **Exclude column** list item. Exclude column
21.	You needn't keep the Period Number column either. Right-click the **Period Number** column header.
22.	Click the **Exclude column** list item. Exclude column
23.	Go ahead and exclude any other unwanted columns. Right-click the **Expiration Date** column header.
24.	Click the **Exclude Column** list item. Exclude column

Step	Action
25.	The analysis is quite a bit simpler than it was a few moments ago. Perhaps you'd like to make another change. You'd like to see the Budget Style accounts separated out from the Cash Style accounts. Right-click the **Budget Record Level Name** column header. Budge
26.	Rather than excluding the column, you can move it to another location. Click the **Move Column** list item. Move Column



Step	Action
27.	You could also drag-and-drop any column, but the menu works just fine. Click the **To Sections** list item. To Sections

Step	Action
28.	The data column has been moved to the Sections area and the analysis is now split into two tables. Scroll down so you can see the full analysis. Click the **Down** button of the scrollbar. 

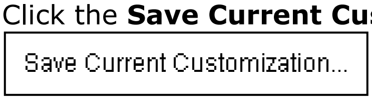


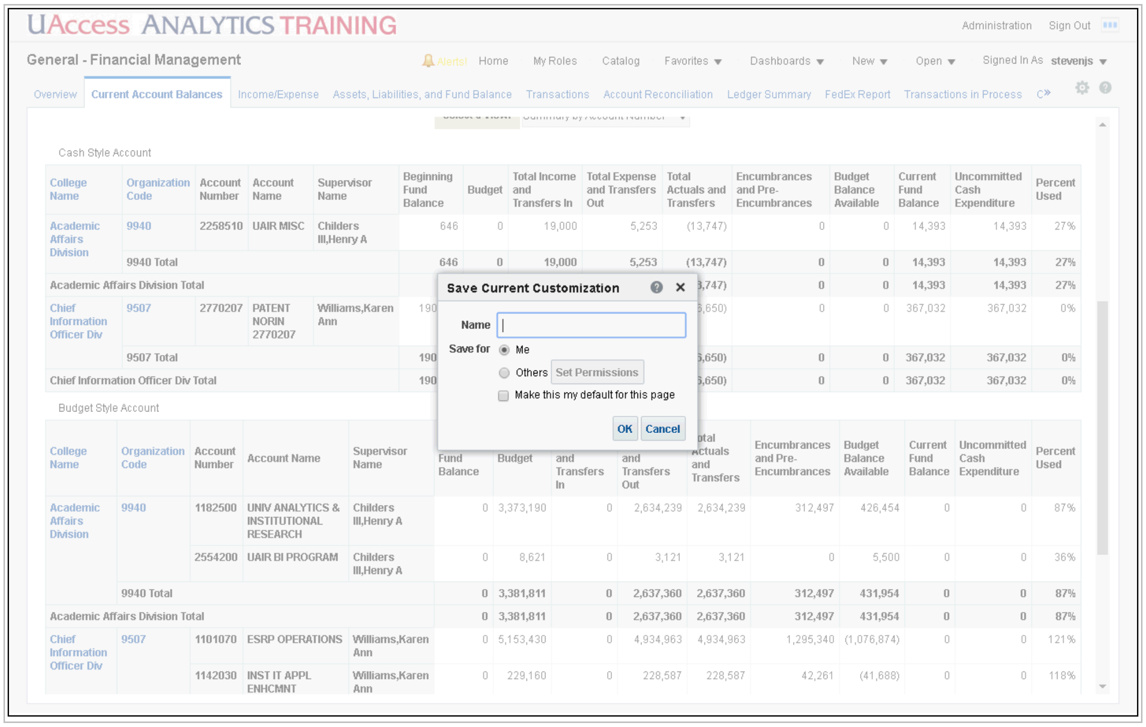
Cash Style Account

College Name	Organization Code	Account Number	Account Name	Supervisor Name	Beginning Fund Balance	Budget	Total Income and Transfers In	Total Expense and Transfers Out	Total Actuals and Transfers	Encumbrances and Pre-Encumbrances	Budget Balance Available	Current Fund Balance	Uncommitted Cash Expenditure	Percent Used
Academic Affairs Division	9940	2258510	UAIR MISC	Childers III,Henry A	646	0	19,000	5,253	(13,747)	0	0	14,393	14,393	27%
	9940 Total				646	0	19,000	5,253	(13,747)	0	0	14,393	14,393	27%
Academic Affairs Division Total					646	0	19,000	5,253	(13,747)	0	0	14,393	14,393	27%
Chief Information Officer Div	9507	2770207	PATENT NORIN 2770207	Williams,Karen Ann	190,382	0	176,650	0	(176,650)	0	0	367,032	367,032	0%
	9507 Total				190,382	0	176,650	0	(176,650)	0	0	367,032	367,032	0%
Chief Information Officer Div Total					190,382	0	176,650	0	(176,650)	0	0	367,032	367,032	0%

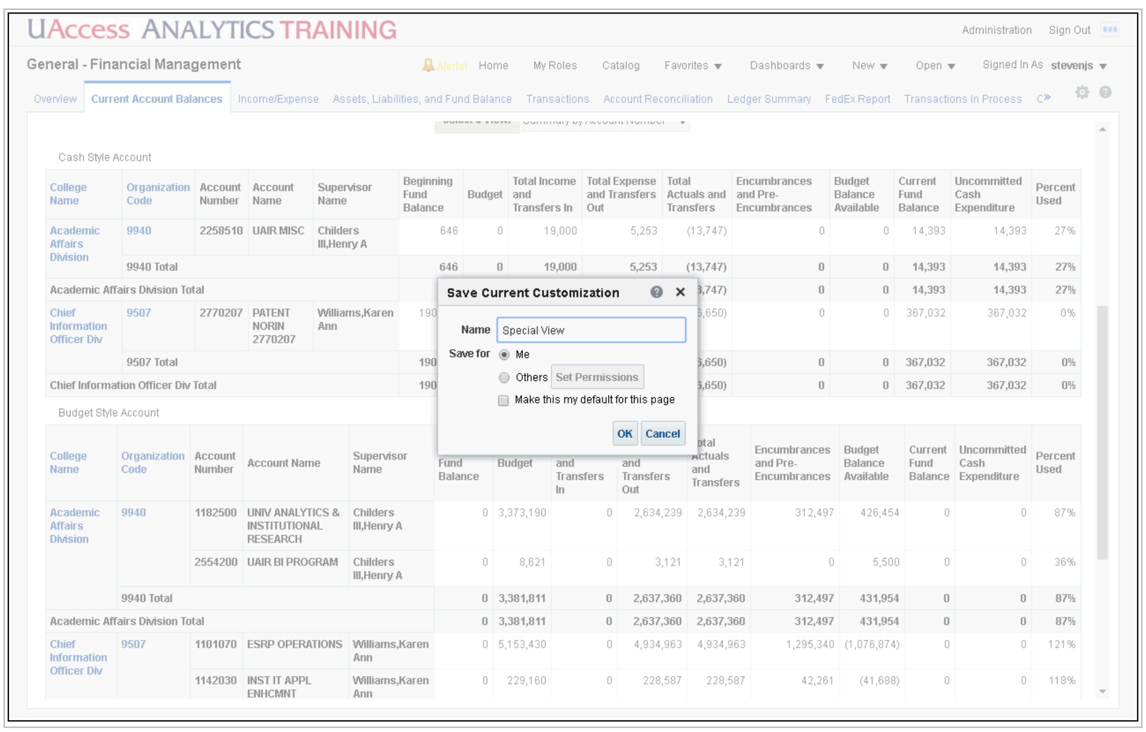
Budget Style Account

College Name	Organization Code	Account Number	Account Name	Supervisor Name	Beginning Fund Balance	Budget	Total Income and Transfers In	Total Expense and Transfers Out	Total Actuals and Transfers	Encumbrances and Pre-Encumbrances	Budget Balance Available	Current Fund Balance	Uncommitted Cash Expenditure	Percent Used
Academic Affairs Division	9940	1182500	UNIV ANALYTICS & INSTITUTIONAL RESEARCH	Childers III,Henry A	0	3,373,190	0	2,634,239	2,634,239	312,497	426,454	0	0	87%
		2554200	UAIR BI PROGRAM	Childers III,Henry A	0	8,621	0	3,121	3,121	0	5,500	0	0	36%
	9940 Total				0	3,381,811	0	2,637,360	2,637,360	312,497	431,954	0	0	87%
Academic Affairs Division Total					0	3,381,811	0	2,637,360	2,637,360	312,497	431,954	0	0	87%
Chief Information Officer Div	9507	1101070	ESRP OPERATIONS	Williams,Karen Ann	0	5,153,430	0	4,934,963	4,934,963	1,295,340	(1,076,874)	0	0	121%
		1142030	INST IT APPL ENHCMNT	Williams,Karen Ann	0	229,160	0	228,587	228,587	42,261	(41,688)	0	0	118%

Step	Action
29.	Very nice! Of course, you don't want to have to make those changes every time you come to this dashboard. Click the **Page Options** button. 
30.	You can save your customization. Click the **Save Current Customization** list item. 



Step	Action
31.	Enter "**Special View**" in the **Name** field.



Step	Action
32.	You could make the customization the default view for the page, but it's not always the best idea to do so. Click the **OK** button. OK
33.	When you leave the dashboard and come back at a later time - two minutes or two weeks later - the dashboard will run with the preset defaults. Click the **Home** link. Home
34.	The dashboard you were just using has had a link added to the **Recent > Dashboards** section of the Home page. Click the **General - Financial Management - Open** link. Open
35.	When you return to the dashboard, the preset defaults are back in place. You can apply your customization, however. Click the **Page Options** button.
36.	Click the **Apply Saved Customization** list item. Apply Saved Customization
37.	Click the **Special View** list item. Special View
38.	Your customization has been applied. *Note: All of the prompt values, including the selected fiscal period, have been applied. If you were to run this dashboard in another fiscal period, you might then have to change that prompt setting.* Click the **Down** button of the scrollbar.

Step	Action
39.	Beautiful! Click the **Home** link. 
40.	 **End of Procedure.**

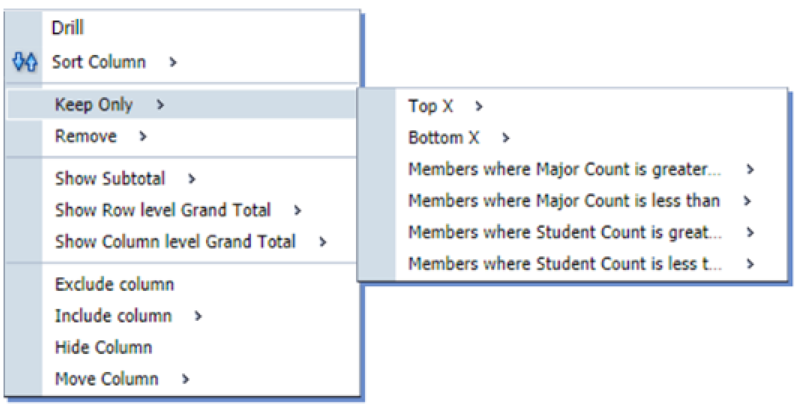
Appendix B

More Analysis Functions on Dashboards

More Analysis Functions on Dashboards

Right-Click Menu

There is an extensive right-click menu available to you for most analyses on most dashboards. The menu can be fairly involved, depending on context, but there is a separate document to more fully explain all of the features and functions. That document, entitled **Working with Dashboards: Right-Click Menus**, is available from the UAccess Analytics Resources page on the UAccess Community.
You will also see a slightly different right-click menu, depending on where on the column you right-click. If you right-click on a column header, you will see a menu that resembles what you see here. If you right-click on the column data, the name of the column will be at the bottom of the main section of the right-click menu, and the secondary menu will closely resemble what is displayed here in the main section of the menu.
We'll take a look at some of the more common items in this document.
Here's an example of a typical right-click menu:



Drill
This function, available on some columns, allows you to drill down to see more detailed information. The column header and column data will be displayed in blue font for those columns where the Drill function is available.
When you drill in a typical column, you add a lower level of information to the table, pivot table, graph, or other view. Depending on where and how you drill, you may also be applying an additional filter to the analysis.
All views in the analysis are affected by drilling in an attribute column. In addition, drilling typically opens the analysis in a new window. You can click the Return link below the analysis to restore the original data.
In addition to the right-click procedures listed here, you could also directly click on either the column header or a column value to get the same results mentioned below.

Procedure – Column Header Drill
This procedure will simply add another, more detailed column of data to the analysis.

Step	Action
1.	Right-click the column header of the column in which you wish to drill. Alternatively, you can just click the label in the column header.
2.	Select **Drill**. The analysis refreshes itself, adding a new column of information to the structure of the analysis. The information in the column will be from a lower level than the original column. For example, if you drill on a college name column, you may see a department column appear.
3.	Select the **Return** link in the lower left corner of the analysis to return to the previous view. **End of Procedure.**

Procedure – Column Value Drill
This procedure will filter the analysis to the data you selected when you right-clicked, and will also add another, more detailed column of data to the analysis.

Step	Action
1.	Right-click one of the values in the column in which you wish to drill. Alternatively, you can just click the value to start the drill/filter process.
2.	Select **Drill**. The analysis refreshes itself, adding a new column of information to the structure of the analysis. The information in the column will be from a lower level than the original column. For example, if you drill on a college name column, you may see a department column appear. In addition, a new level of filtering will be applied to the analysis, based on the data value you selected when you right-clicked. You will see the additional filter in the Filters View at the bottom of the analysis.
3.	Select the **Back** link in the lower left corner of the analysis to return to the previous view. Select the **Return** link in the lower left corner of the analysis to return to the default view. **End of Procedure.**

When you drill on a hierarchical column (they have a plus sign (+) on the left side of the highest-level column values), you expand or collapse the levels of data that are in the analysis. Drilling in a hierarchical column affects only that particular view. No other views are affected.

Sort Column
You have the option of sorting or ordering the analysis by any of the available columns, as always. This function hasn't changed.

Keep Only or Remove
Right-clicking on a column heading reveals a pop-up menu with a variety of options for column settings. Two of those options give you the ability to either **Keep** or **Remove** particular information from the analysis.

Right-clicking on the data, as previously mentioned, will typically give you a slightly different menu than you'd see by right-clicking the column header.
The **Keep Only** and/or **Remove** functions are really powerful ways to personalize a dashboard analysis, narrowing the scope of the data to see just the information you wish to see.
Please understand that the number and scope of the items revealed on the sub-menu will differ from analysis to analysis, as those menu items are based on the data contained within the analysis. There are, however, four main options as explained below.

Step	Action
1.	Right-click the column header of the column you wish to work with.
2.	Select **Keep Only >** or **Remove >** from the menu, as desired.
3.	Select an item from the sub-menu and enter any required information. • **Top X >** Based on (one of the columns to the right) • **Bottom X >** Based on (one of the columns to the right) • **Members where** (one of the columns to the right) **is greater than >** *a set value or another column's value* • **Members where** (one of the columns to the right) **is less than >** *a set value or another column's value* The analysis will refresh itself appropriately, keeping or removing data as requested.
4.	You can only undo this change by using the Clear My Customizations option available under the Page Options button in the upper-right corner of the screen. Please remember that using this option will clear *all* of the customizations or modifications that you've made up to this point. **End of Procedure.**

Show Subtotal, Show Row level Grand Total, or Show Column level Grand Total
You now have the ability to include or remove any totals or subtotals that might appear in the analysis.

- **Show Subtotal** will add a subtotal to nearly any column in either a table or pivot table, totaling all values vertically within the selected column. The subtotal will appear in the selected location.
- **Show Row level Grand Total** will add a grand total to the bottom of the table or pivot table, totaling all values vertically, including subtotals.
- **Show Column level Grand Total**, available only on pivot tables, will add a column on the far right end of the pivot table, totaling all values horizontally within each row.

The procedures for any of the three options are similar.

Step	Action
1.	Right-click the column header of the column you wish to subtotal.
2.	Select **Show Subtotal >** from the menu. • Select **After Values**, **Before Values**, **At the Beginning**, or **At the End**, as appropriate. The analysis will refresh itself and show the subtotal in the selected location.

Step	Action
3.	To remove a subtotal, right-click the column for which a subtotal is displayed. • Select **None** from the menu. The analysis will refresh itself and the subtotal will no longer be shown.
4.	You can only undo this change by using the Clear My Customizations option available under the Page Options button in the upper-right corner of the screen. Please remember that using this option will clear *all* of the customizations or modifications that you've made up to this point. **End of Procedure.**

Exclude Column

One of the existing options is the option to **Exclude columns** from the analysis. This is a powerful way to personalize those prebuilt dashboard reports that seem to have more columns than you or your department need in the report. The process hasn't changed.

Step	Action
1.	Right-click the column header of the column you wish to exclude.
2.	Select **Exclude column**. The analysis will refresh itself, removing the column. Please note that the column is only removed from the view you have on your screen. It is not deleted from the analysis. **End of Procedure.**

Include Column

This function gives you the ability to *include* a column from a list of all of the columns that are in the analysis. That means that if the person or team who created the analysis have *excluded* a column from the table or pivot table, you can add it back in with this function. You cannot, however, add just any column from the subject area. You can only include those columns which have previously been excluded, either by you or by the person or team who created the analysis.

Step	Action
1.	Right-click the column header to the left of the position in which you wish to add the new column.
2.	Select **Include column**.
3.	Select the column you wish to include from the pop-up menu. The menu includes all columns that have been added to the analysis but that have been excluded. The analysis will refresh itself. The new included column will be added to the analysis to the right of the column you right-clicked on as you started the procedure. **End of Procedure.**

Move Column

The Move Column function has been changed a bit, but in essence is the same as it was previously. Feel free to follow the right-click procedure below. Alternatively, you can simply drag-and-drop any column to a new location, as before. Note that you cannot use drag-and-drop in the Chrome or Safari browsers.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Right-click the column header for the column you wish to move.</td></tr>
<tr><td>2.</td><td>Select Move Column >.
Select Before Current Column or After Current Column to move the selected column one space to the left or right, as appropriate.
Select To Prompts or To Sections to move the column to that area of the table or pivot table.
Within pivot tables, you also have the option of To Columns, which will move the data column to the Columns area of the pivot table.

The analysis will refresh itself, moving the column as requested. If you wish to move the column back or move it again, simply repeat the procedure.</td></tr>
</table>