University Analytics
& Institutional Research

UAccess Analytics

Intermediate Reports & Dashboards

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Record of Changes		
Date	**Version #**	**Description**
06/01/2012	1.00	Original
04/24/2014	1.10	Updated information regarding the UAccess Community, and added instructions and references for the Selection Steps view. Copyright information updated to 2014.
06/01/2015	1.20	Updated branding (logos and fonts)
01/01/2017	2.00	Adapted the book contents to match current teaching content.
07/07/2017	3.00	Completely updated to match the latest version of the UAccess Analytics software.
07/13/2017	3.01	Made minor changes to add a missing step on page 10, correct a date on page 10, and add a missing character on page 61.
07/01/2018	3.10	Added information about Analytics Office Hours
08/01/2019	3.20	Added the cover graphic and updated the branding to UAIR.
10/18/2019	3.21	Repaginated to better align sections to the right-hand, odd-numbered page.

Table of Contents

About this Workshop

This workshop is the second of our hands-on sessions introducing attendees to UAccess Analytics, the University's report and dashboard creating tool.

This session is intended for users who have a need for more sophisticated analyses and dashboards, both for themselves and for others.

Attendees will create analyses that incorporate pivot tables and graphs, will use variables in filters and SQL coding in columns, and will create an agent to deliver data to their desktop.

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 **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.

Intermediate Reports and Dashboards

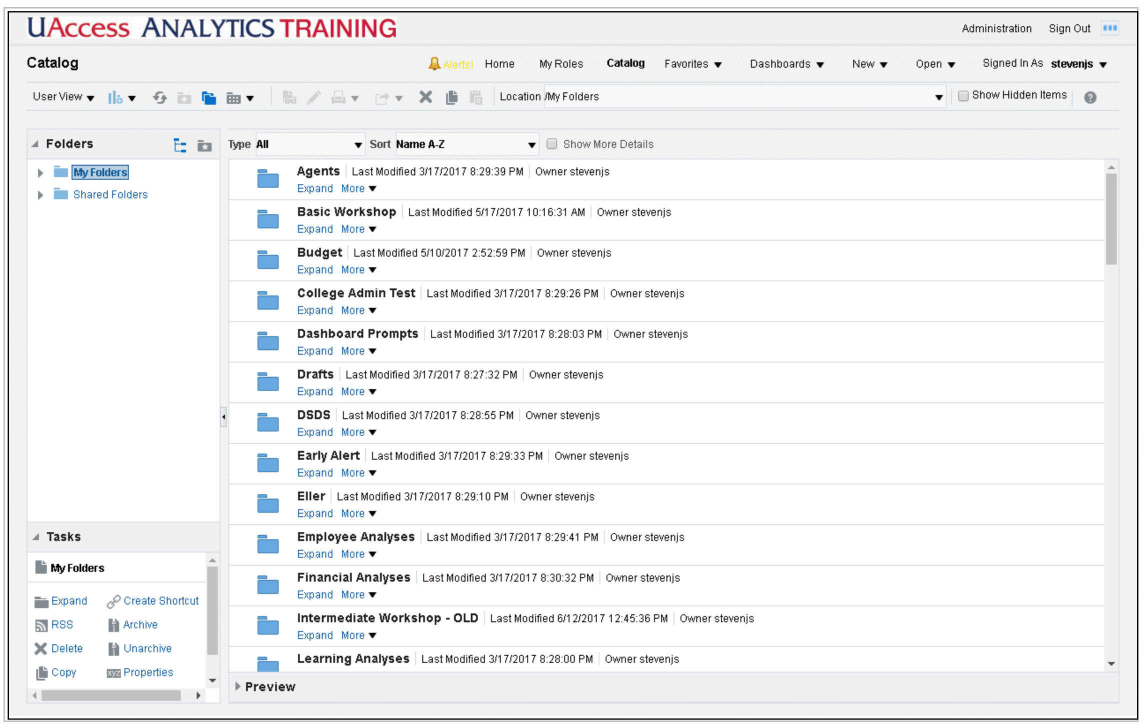
Using the Catalog

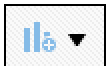
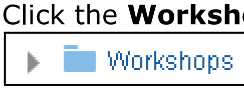
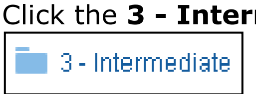
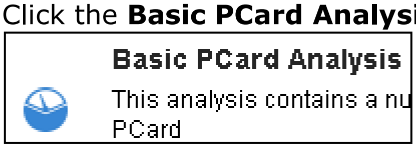
Copying Analyses

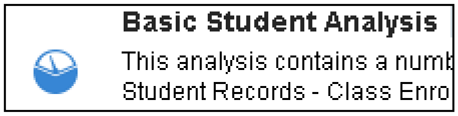
Procedure

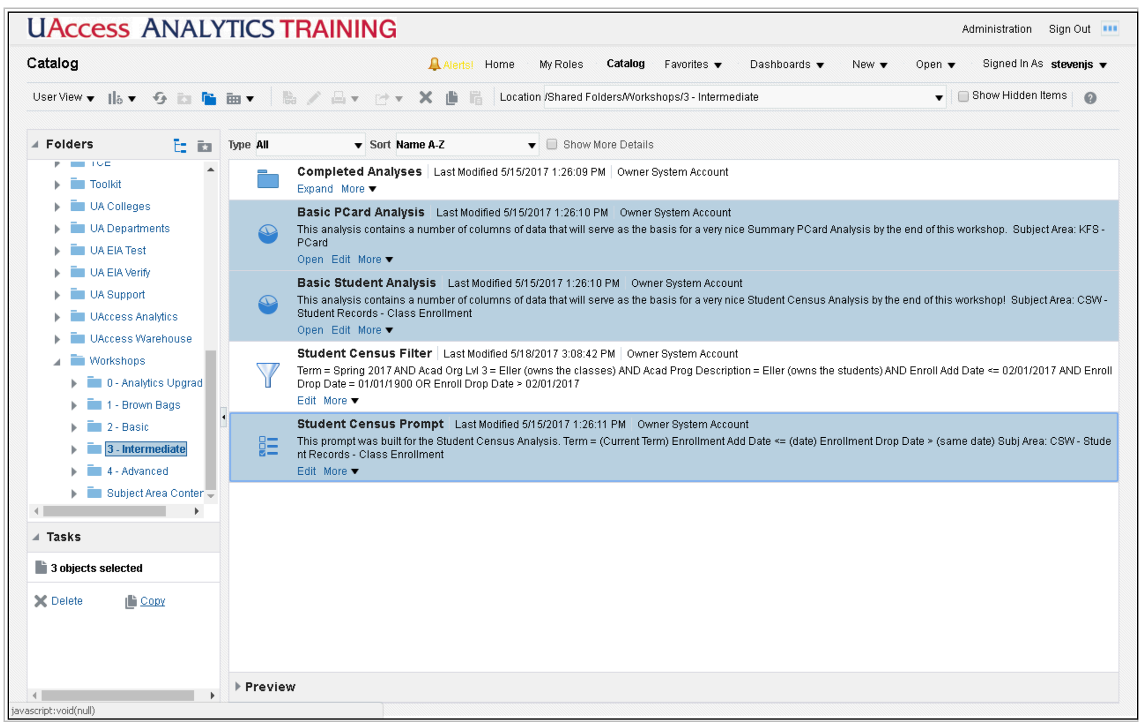
The Analytics Catalog is simply a file management tool built into UAccess Analytics.

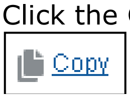
Step	Action
1.	You can access the Catalog by clicking the Catalog link on the Global Header. Click the **Catalog** link. 

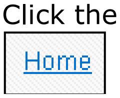


Step	Action
2.	In the Catalog, you can see all of your own personal My Folders folder. You also have access to some set of Shared Folders. Within those folders, you can move things around, rename them, and create new folders. Click the **New** button. 
3.	Create a new folder. Click the **Folder** list item. 
4.	Enter "**Intermediate Workshop**" in the **Name** field.
5.	Click the **OK** button. 
6.	You can see that your new folder has been created. Now let's copy some already-created analyses into that folder. Click the **Shared Folders** dropdown button to activate the menu. 
7.	Scroll down in the Folders pane. When you've located the Workshops folder, you can open that folder. Click the **Workshops** dropdown button to activate the menu. 
8.	Scroll down again to locate the 3 - Intermediate subfolder. Click the **3 - Intermediate** list item. 
9.	Now you can see the contents of that folder. We need to copy three things from this folder and paste those copies into the Intermediate Workshop folder you created a few moments ago. Click the **Basic PCard Analysis** list item. 

Step	Action
10.	Now copy the other two items. Press the **[Ctrl]** key and click the **Basic Student Analysis** list item. 
11.	Press the **[Ctrl]** key and click the **Student Census Prompt** list item. 



Step	Action
12.	Using one of the buttons in the **Tasks** pane, you can now copy the selected items to the computer's clipboard. The Tasks pane is in the lower left corner of the screen. Click the **Copy** button. 

Step	Action
13.	The items have been saved to the clipboard on your computer. Scroll up in the Folders pane. Go all the way to the top. Now expand the **My Folders** folder. Click the **My Folders** dropdown button to activate the menu. 
14.	Scroll down if you need to do so and locate your new Intermediate Workshop folder. Click the **Intermediate Workshop** list item. 
15.	Now paste the just-copied items into the Intermediate Workshop folder. Click the **Paste** button. 
16.	Good job! The three items you copied have been pasted into your new folder. Click the **Home** link. 
17.	That's it! You've copied two analyses and a dashboard prompt from a shared folder into a new personal folder. Good job! **End of Procedure.**

Exercise 1 - Creating the Student Census Analysis

Exercise 1 - Scenario and Outline

Exercise 1 - Creating the Student Census Analysis

Modify the Basic Student Analysis and save it in your Intermediate Workshop folder as Student Census Analysis.

Scenario: *Your boss wants to know how many students were enrolled in your college on Census Day of the Spring 20___ term. She has asked you to create a report showing a summary count of students attending classes at your college, counting only students enrolled at your college in those classes for that semester. Fortunately, you had already started working on just such a report! You can start with the Basic Student Analysis, making appropriate edits to get just what your boss needs.*

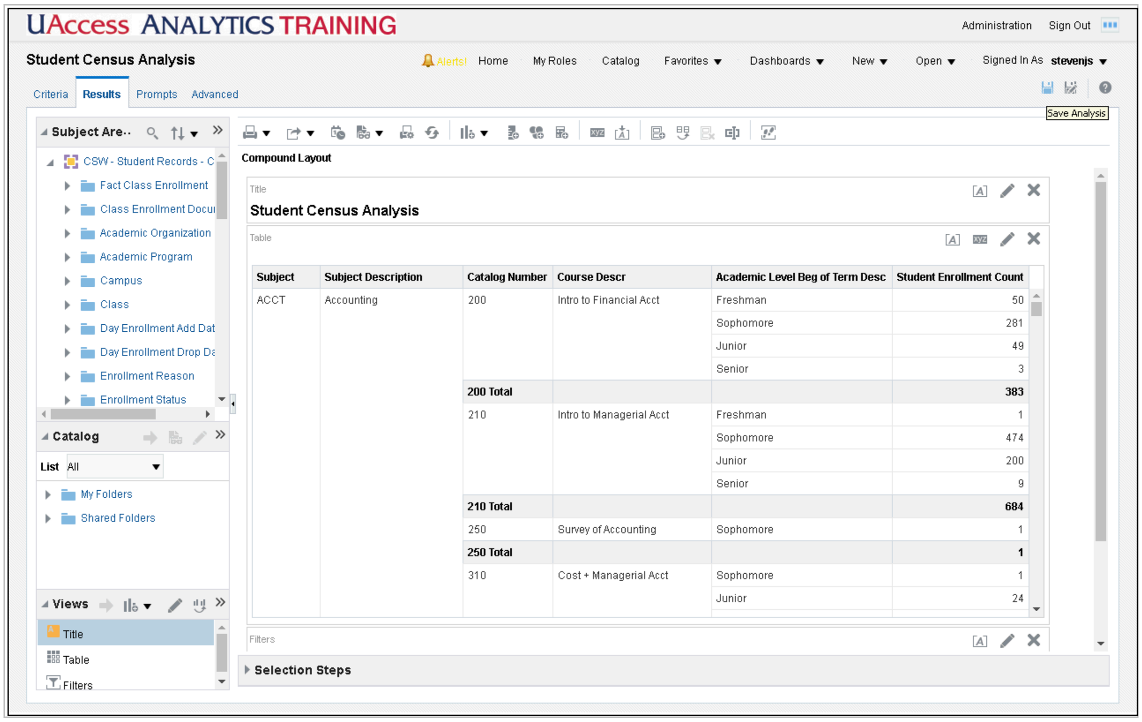
In this exercise, you will:

- Add filters
    - Term Description = Spring 20___ ***and***
    - Academic Organization Level 3 = [your college] ***and***
    - Academic Program Description = [your college] ***and***
    - Enrollment Add Day Date <= 02/01/20___ ***and***
        - Enrollment Drop Day Date = 01/01/1900 ***or***
        - Enrollment Drop Day Date >= 02/01/20___
- Edit the Table View
    - Add a grand total to the table
    - Add subtotals to the Subject and Catalog Number columns
    - Hide the Academic Level Beg of Term Code column
- Add a Selection Step view and a Filters view

All of the steps have been laid out for you on the following pages, along with a few screen shots.

Just a few things as you begin:

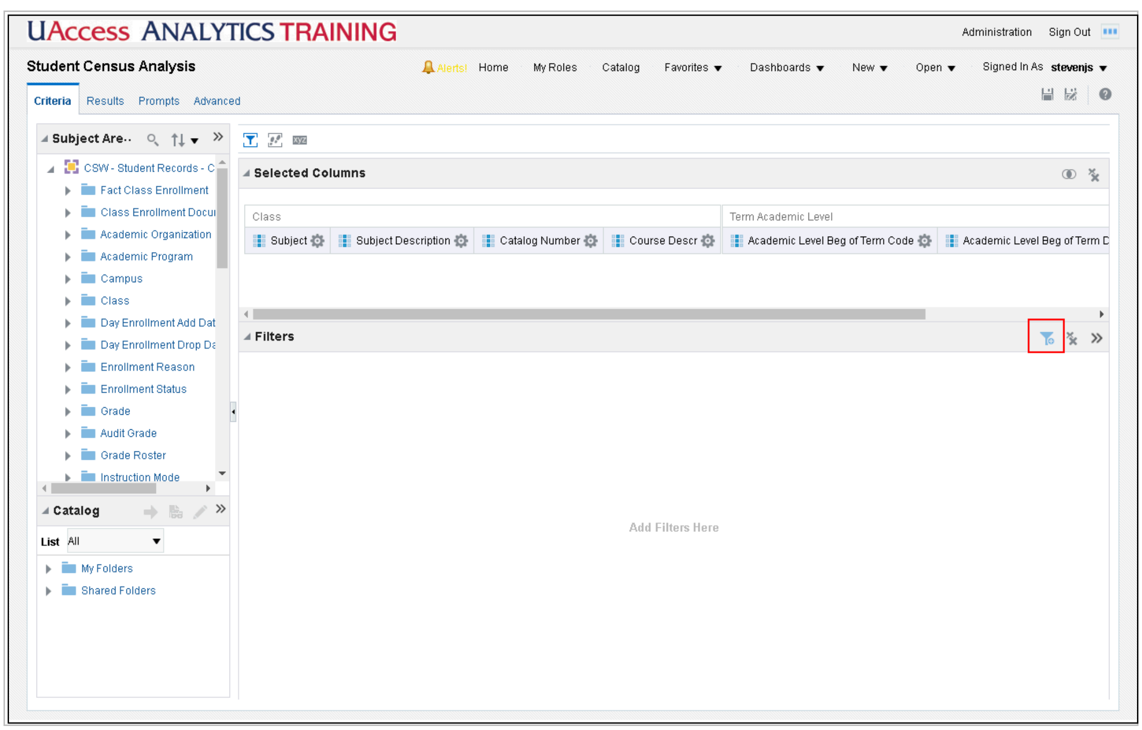
- This is not a test.
- You will have adequate time to complete this exercise.
- Feel free to ask questions of the instructor or your neighbor.
- Feel free to work with your neighbor.
- If the instructions in the book are not clear to you, please ask for clarification.
- If you would like to take a short break during the exercise, please do so.


UAccess ANALYTICS TRAINING
Administration
Sign Out
Student Census Analysis
Alerts!
Home
My Roles
Catalog
Favorites
Dashboards
New
Open
Signed In As stevenjs
Criteria
Results
Prompts
Advanced
Save Analysis
Subject Are..
CSW - Student Records - C
Fact Class Enrollment
Class Enrollment Docu
Academic Organization
Academic Program
Campus
Class
Day Enrollment Add Dat
Day Enrollment Drop Da
Enrollment Reason
Enrollment Status
Catalog
List All
My Folders
Shared Folders
Views
Title
Table
Filters
Compound Layout
Title
Student Census Analysis
Table
Subject
Subject Description
Catalog Number
Course Descr
Academic Level Beg of Term Desc
Student Enrollment Count
ACCT
Accounting
200
Intro to Financial Acct
Freshman 50
Sophomore 281
Junior 49
Senior 3
200 Total 383
210
Intro to Managerial Acct
Freshman 1
Sophomore 474
Junior 200
Senior 9
210 Total 684
250
Survey of Accounting
Sophomore 1
250 Total 1
310
Cost + Managerial Acct
Sophomore 1
Junior 24
Filters
Selection Steps

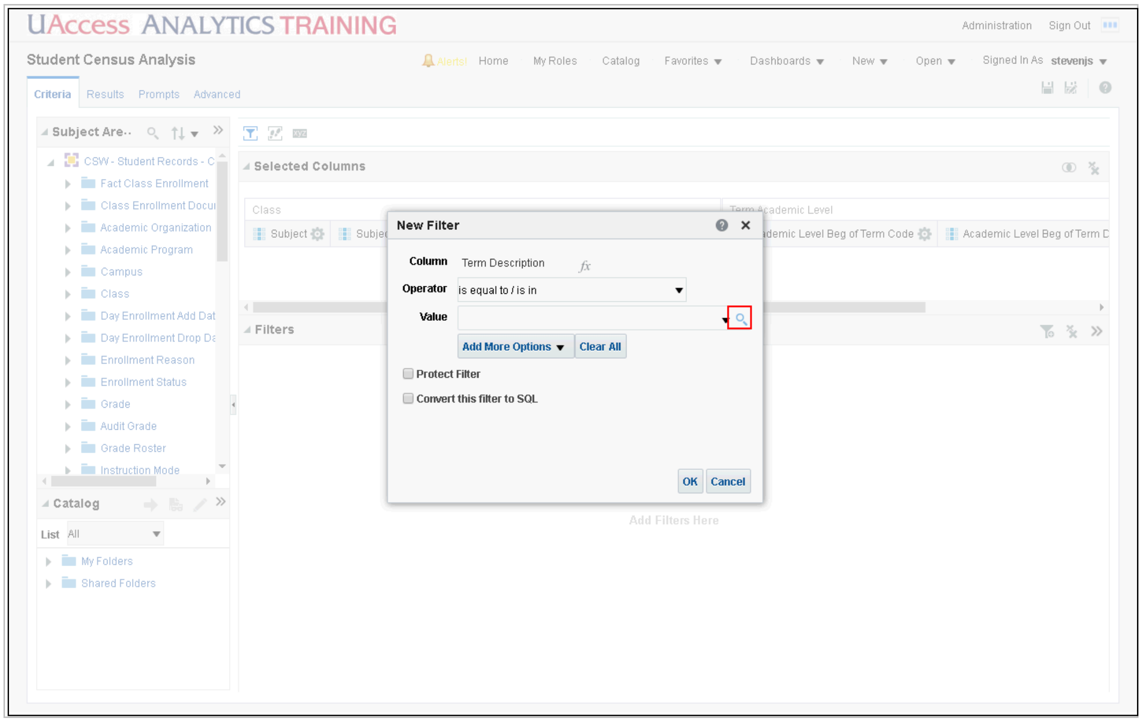
Exercise 1 - Criteria Tab

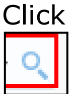
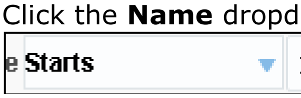
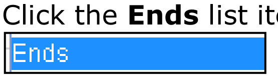
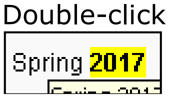
Procedure

Step	Action
1.	Open the Catalog. Click the **Catalog** link. Catalog
2.	Edit the Basic Student Analysis. Click the **Edit** link. Edit
3.	Now save the analysis with a new name. Click the **Save As** button. 
4.	Enter "**Student Census Analysis**" in the **Name** field.
5.	Click the **OK** button. OK



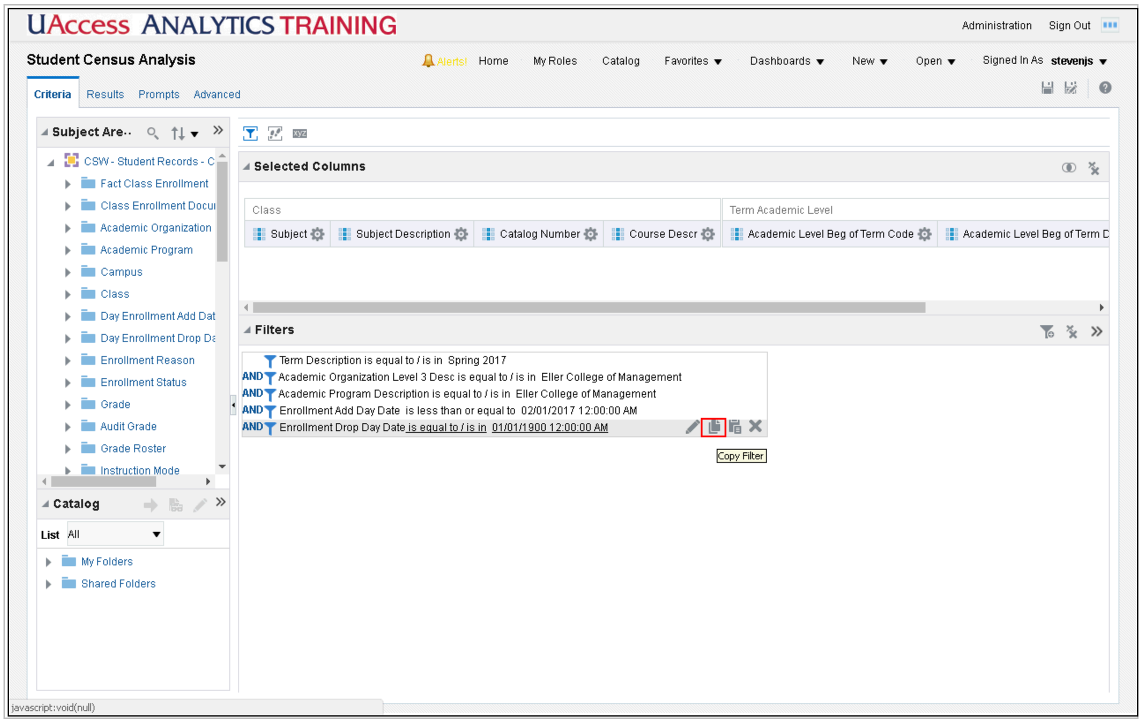
Step	Action
6.	None of the data columns you need for filtering are actually included in this analysis. Nor do they need to be. You can create filters using data columns that are not included in this report. Use the "martini glass" button on the right side of the Filters bar to add filters for columns that are not included in the analysis. You will go through the following few steps for each of the filters you need in this analysis. Click the **Create a Filter** button. 
7.	This is a list of all of the data columns currently in the analysis. You need to create a filter for a column that's not in the list. Click the **More Columns** list item. 
8.	Scroll down in the Select Column screen until you see the Term table. Click the **Term** dropdown button to activate the menu. 
9.	Click the **Term Description** list item. 
10.	Click the **OK** button. 

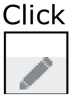


Step	Action
11.	When you open a New Filter screen, you can use the Search function if you wish. Sometimes it makes things easier. Click the **Search** magnifying glass. 
12.	You can search for the year you're looking for. Enter "**20__**" in the **Name** field.
13.	Now change the Starts value to show the Ends value. Click the **Name** dropdown button to activate the menu. 
14.	Click the **Ends** list item. 
15.	Click the **Search** button. The system returns all values containing 20__. 
16.	Double-click the **Spring 20__** list item. 

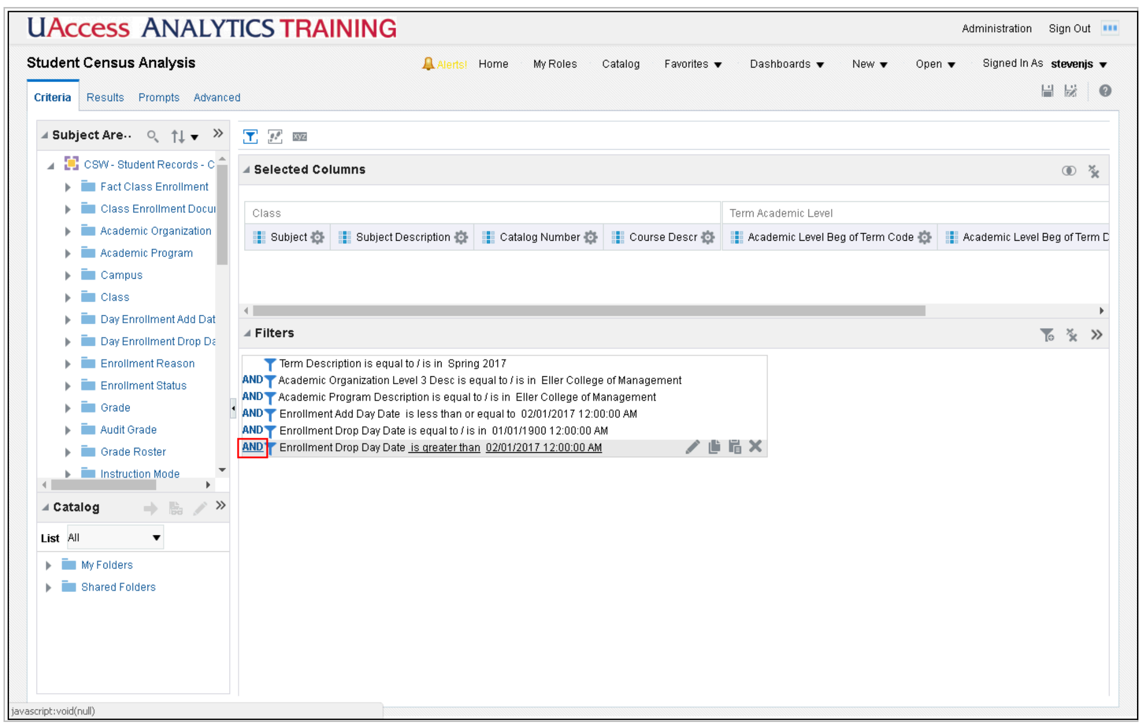
Step	Action
17.	The item moves from the Available side of the screen to the Selected side of the screen. Click the **OK** button. 
18.	Click the **OK** button. 
19.	Click the **Create a Filter** button. 
20.	The next four filters will be created using the same multi-step process you've just gone through for the first filter.
21.	Create a filter to limit the student count to only those students who are majoring at your college. Follow the steps used in the previous filter. Table > Column: **Academic Organization > Academic Organization Level 3 Desc** Operator: *is equal to / is in* Value: **Eller College of Management** *or* [**your college**]
22.	Create a filter to limit the student count to only those students taking classes at your college. Follow the steps used in the previous filter. Table > Column: **Term Career Program Plan > Academic Program Description** Operator: *is equal to / is in* Value: **Eller College of Management** *or* [**your college**]
23.	Create another filter to limit the student count to those students enrolled in the Spring 20__ term who enrolled on or before the desired day. Follow the steps from the previous filters. Remember that you can type in the filter's Value field. Table > Column: **Day Enrollment Add Date > Enrollment Add Day Date** Operator: *is less than or equal to* Value: **02/01/20__**
24.	Create another filter specifically to retain those students who have not dropped a class. Those students will have a placeholder date of 01/01/1900 placed in the drop date field in Analytics. We have to be sure to keep those students in the report. Table > Column: **Day Enrollment Drop Date > Enrollment Drop Day Date** Operator: *is equal to / is in* Value: **01/01/1900**

Step	Action
25.	The final filter you need to create is a modified version of the filter you just finished building. You can copy that filter, then paste the copy into the filter list, and edit the copy.



Step	Action
26.	The final filter you need to create is a modified version of the filter you just finished building. You can copy that filter, then paste the copy into the filter list, and edit the copy. Click the **Enrollment Drop Day Date - Copy Filter** button. 
27.	Click the **Enrollment Drop Day Date - Paste Filter** button. 
28.	Now edit the copied filter. Click the **Enrollment Drop Day Date - Edit Filter** button. 

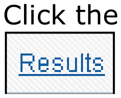
Step	Action
29.	In this filter, you need to keep the students who dropped any class on or after the desired date. Click the **Operator** dropdown button to activate the menu. 
30.	Click the **is greater than** list item. 
31.	Enter "**02/01/20__**" in the **Value** field.
32.	Click the **OK** button. 

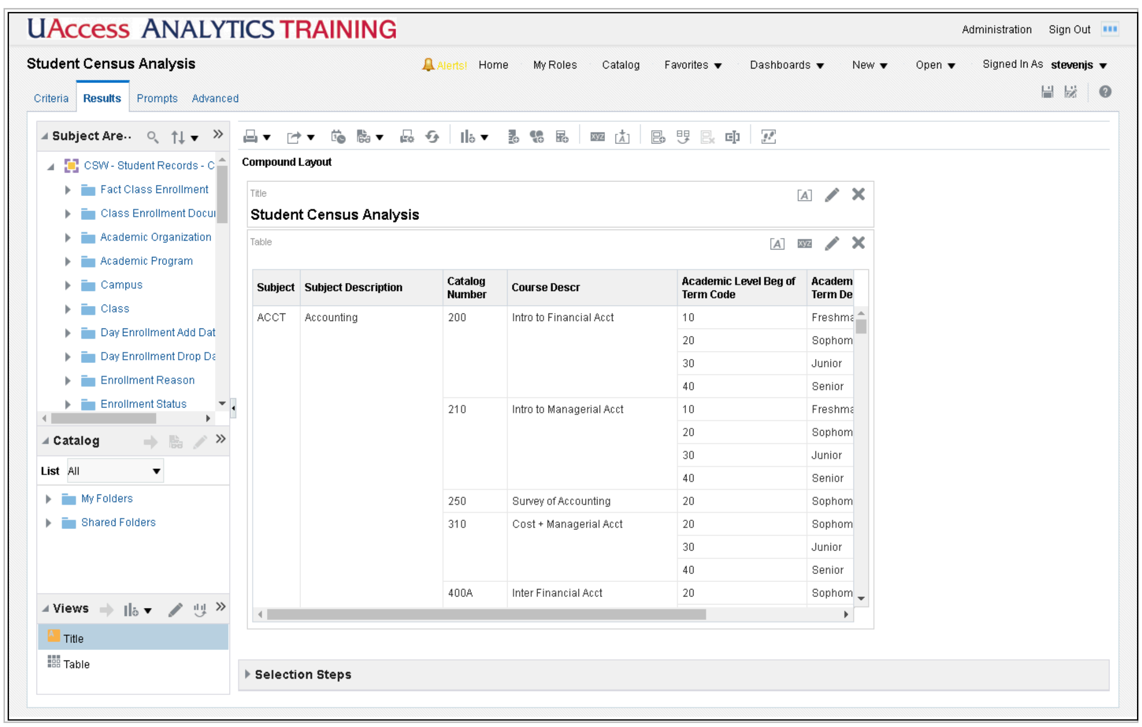


Step	Action
33.	No student can actually have two different Enrollment Drop Day Date values in their individual record. You want the filter to find either one or the other value, so you need to change the last **AND** to an **OR.** Click the **bottom AND** link. 

Step	Action

34.	Reading through the filter, this analysis will now show all students who are enrolled in classes in the
	- Spring 20__ term, **and**
	- whose major is owned by the selected organization, **and**
	- who are enrolled in classes owned by the selected college, **and**
	- who enrolled in their classes before or on the selected date, **and**
	   - who have not dropped any classes **or**
	   - who dropped classes after the selected date
	
	In other words, all students enrolled in your college, taking classes at your college, who were enrolled and taking classes on the desired date in the desired term.

35.	Click the **Save** button. 
36.	Click the **Results** tab. 



Step	Action
37.	**STOP HERE while the rest of the class catches up.** **After covering the next page as a group in class, the exercise continues for a few more pages.** **End of Procedure.**

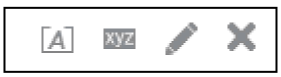
Scrolling Data or Paginated Data?

Scrolling Data or Paginated Data?

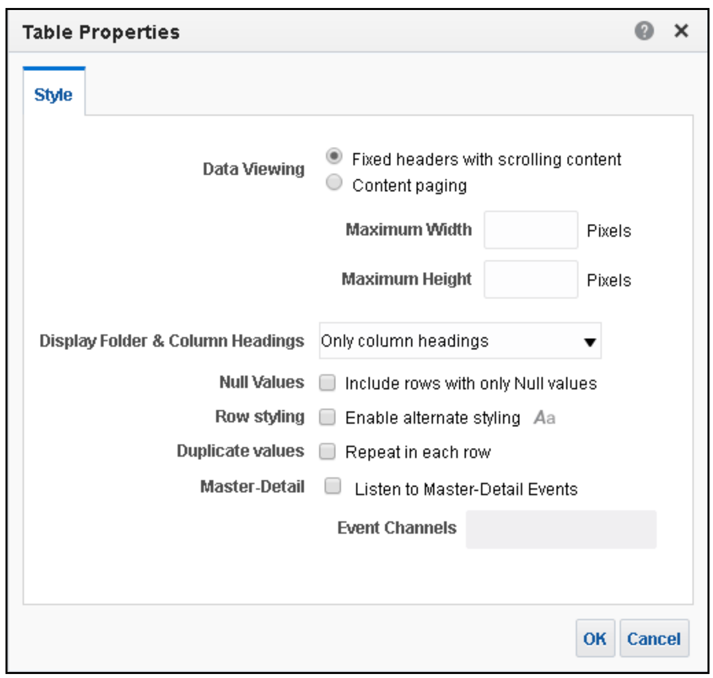
When you create a new analysis in Analytics, the default method of moving through the data in the table is to scroll up and down in the table using the scroll bar on the right side of the table, or using the scroll wheel on your mouse. The column headers are locked in place, and the data scrolls up and down below those headers. That same default scrolling function would be in place if you were to add a new table or a new pivot table to an existing analysis.

In some instances, the data in the table is wide enough that the width of the data exceeds the default width of the table, which is set at 600 pixels. In that situation, you might decide to edit the table properties to make the table wider.

In other instances, a table or pivot table will function better if the scrolling action were turned off and a paginated table or pivot table were used. Fortunately, editing the table properties to make the switch is relatively easy.



From the Results tab on your analysis, locate the table view or pivot table view you wish to edit. In the upper-right corner of that view you'll see a small button bar. Click the **View Properties** (gray XYZ) button. It's the second button from the left.

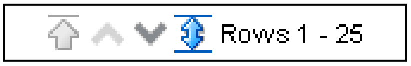


On the Table Properties screen, you'll see the Data Viewing section has a few options available.

The scrolling function is referred to here as **Fixed headers with scrolling content**. It's the default method of viewing data.

If the data in your analysis is causing the table to have both a horizontal and a vertical scroll bar, you might consider increasing the width of the table.

The default width is 600 pixels; the default height is 700 pixels. You can increase the width up to a maximum width of 2880 pixels. The height field will max out at 1800 pixels. The minimum values for either field is 75 pixels.



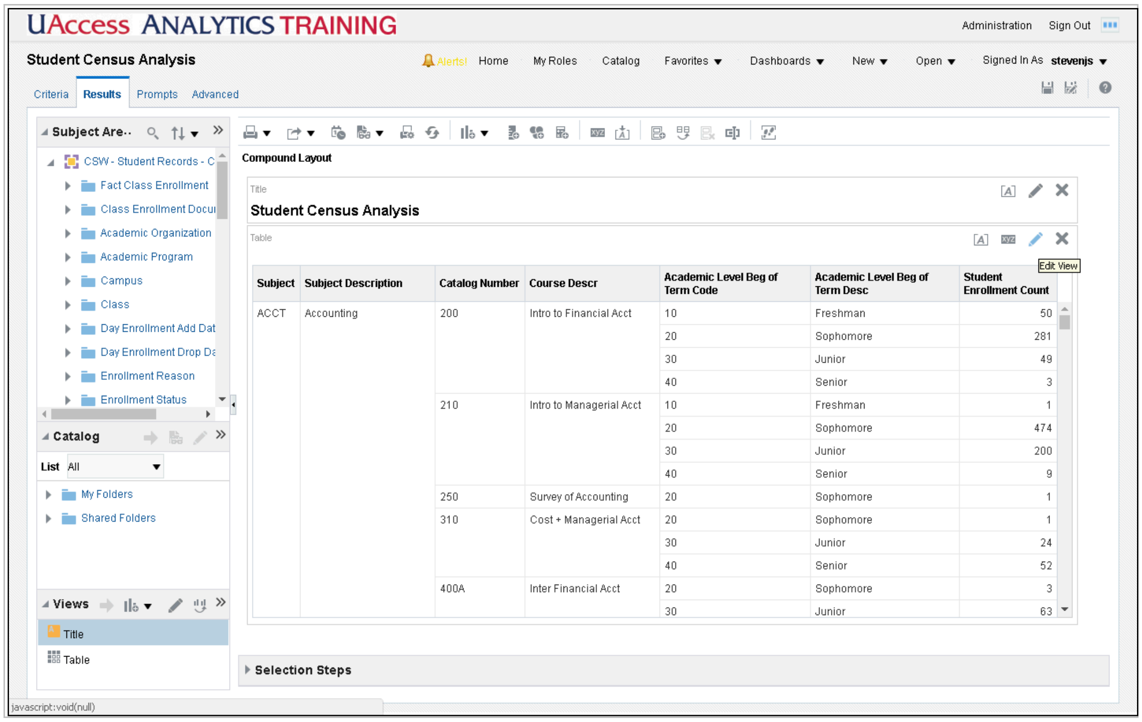
If you wish to change the action of the table, you could select the **Content paging** option rather than using the scrolling option. This will paginate your analysis into pages of 25 rows each and will put a set of paging buttons at the bottom of that analysis.

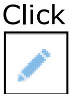
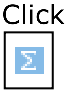
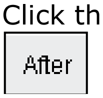
Exercise 1 - Results Tab

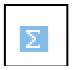
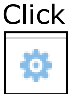
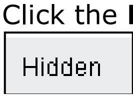
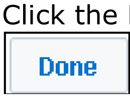
Procedure

You've completed the Criteria tab portion of the exercise, and have learned how to change the display of the table.

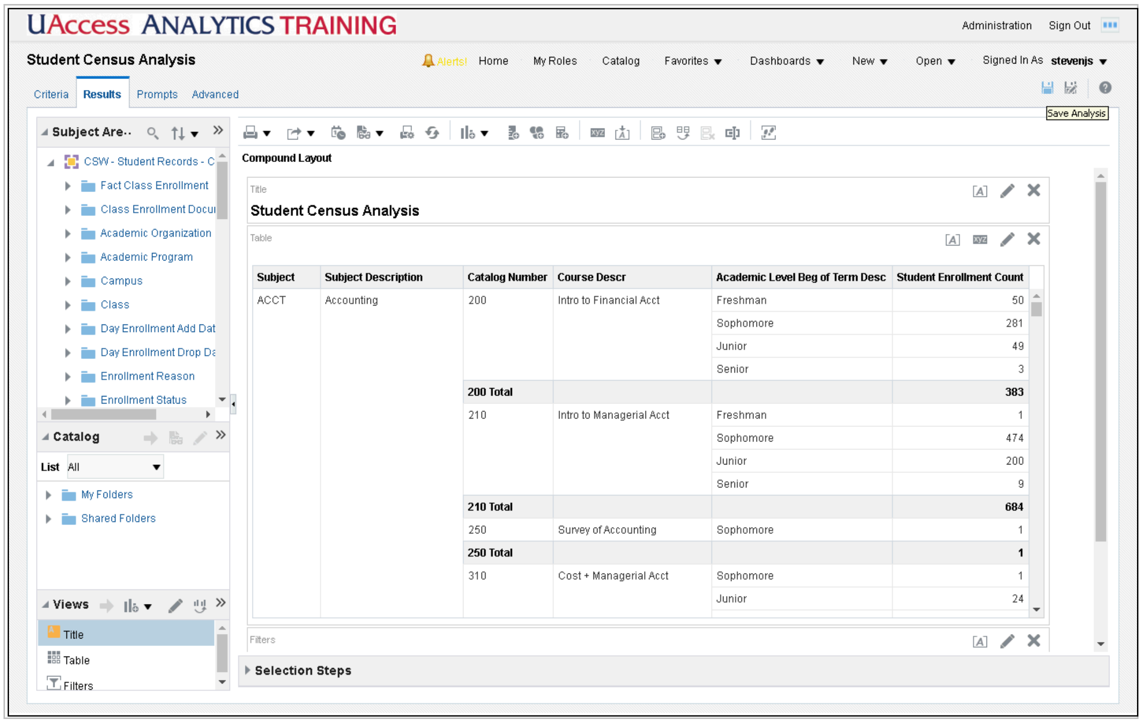
Continue the exercise by editing the table view.



Step	Action
1.	Enter Edit View mode for the table. Click the **Edit View** button. 
2.	First, add a grand total in the **Table** area, using the "sigma button" for the **Columns and Measures** area. Click the **Totals** button. 
3.	Click the **After** list item. 

Step	Action
4.	Now add a subtotal to the **Subject** data column. Click the **Total** button. 
5.	Click the **After** button. 
6.	Add another subtotal to the **Catalog Number** data column, using the same procedure you used with the Subject data column.
7.	The table now has the grand total and subtotals that you've added. That's great! Lastly, hide the **Academic Level Beg of Term Code** data column. ***Note:*** *You will likely have to compare the order of the data columns in the Layout pane with the order of the columns in the preview screen to determine which of the columns in the layout pane is the **Code** column. You're typically not able to read the entire column label.* Click the **More Options** button. 
8.	Click the **Hidden** list item. 
9.	You've finished editing the Table view. Click the **Done** button. 
10.	You're now back on the standard **Compound Layout** screen. Any users of this analysis - including you - should have a way of seeing how this analysis has been filtered without having to access the Criteria tab. Click the **New View** button. 
11.	Click the **Filters** list item. 

Step	Action
12.	Be sure to save your newly modified analysis. Click the **Save** button. 



Step	Action
13.	***Congratulations! You've completed the exercise!*** **End of Procedure.**

Setting Print Options

Setting Print Options for your Analysis

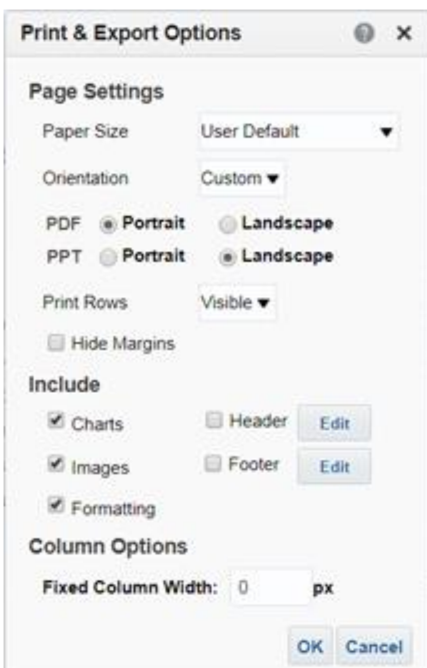
As you begin creating and using your own analyses and dashboards, you certainly need to set up those analyses and dashboards so they print properly. For example, you might want wider analyses to be printed in landscape mode, and narrower analyses in the default portrait mode. You might also want to be sure that, when any analysis is printed, *all* of the data is being printed and not just the data that is visible on the screen. Those types of print options must be set for each individual analysis.

Setting Print Options

On the **Results** tab for any analysis, there is a button bar that runs across the screen just above the Compound Layout pane. The fifth button from the left – the **Print & Export Options** button – is the access point for making any selections or changes for printing options for this analysis.

When you click the **Print & Export Options** button, you're presented with the Print & Export Options screen. There are **Page Settings, Include,** and **Column Options** sections on this little screen.

Page Settings



The **Paper Size** setting can be adjusted to accommodate a few different sizes of paper. This is typically left at **User Default**, which normally means "use 8½ x 11 inch paper."

The default **Orientation** values are **Portrait** for printing PDF documents, and **Landscape** for reports viewed in PowerPoint.

If you wish to change those settings, change the **Orientation** option to **Custom**, then make your changes.

The **Print Rows** field should always be set to **All**, rather than the default Visible. This is probably the most important setting you'll make on this screen.

You might elect to hide the margins, as well.

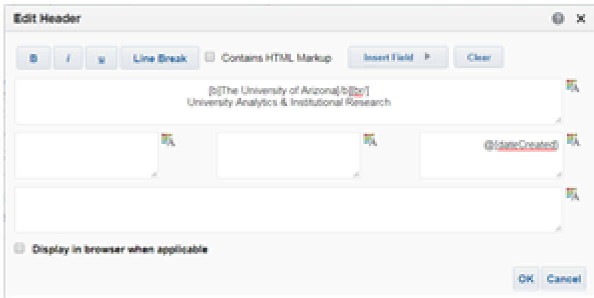
Include

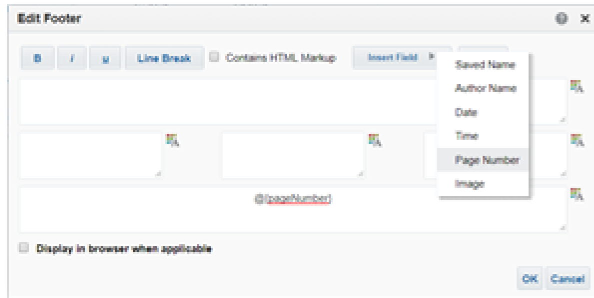
You can, if you wish, elect to print any charts or images included in your report, and can translate the formatting to your printed report. Those three options are checked by default.

You might consider including a header and/or footer section in your printed analyses.

For the header you could, for example, choose to include the phrase "The University of Arizona" and the name of your college or department at the top of each page of your report.

If you choose to include a footer, you might add a page number or other item.





There are five separate sections in the **Edit Header** and **Edit Footer** screens. Use the formatting buttons in the upper left as desired. You can also format the text in individual sections using the **Edit Format** buttons for any or all of the five sections. Use the **Insert Field** button to insert specific pieces of information into the section where your cursor is flashing.

Column Options

If you wish, you can set a fixed column width for all columns in the printed report. This will override any customization or other settings you've created in the analysis itself, but will only affect the printed report.

This option might be a way to force a wider report to print appropriately in Portrait mode, or provide extra space in narrow columns in a small report.

Establish Standards

Once you have your **Print & Export Options** set up, you may wish to make note of the different settings and options you've selected so you can replicate them for any additional analyses you create. Using those same settings across the board will ensure a consistent look for all of your department or college reports. There is no option to simply copy the header from one analysis to another.

SQL Coding

About SQL Coding

About SQL Coding

What is SQL Coding?

SQL, or Structured Query Language, often pronounced as "sequel", is a special-purpose programming language designed for managing reporting data coming from a data warehouse.

Why Use SQL Coding?

The values presented in any analysis are typically the standard or default values that were entered by a user into the source transaction system, and those values appear in Analytics exactly as they were entered. Most of the time, that's exactly what you want. Sometimes, there is a specific and definite need to modify the data you see in your report. Sometimes, it would just be handy if you were able to do so.

In the Full-Time Student Indicator column (or any other Flag or Indicator data column found in any subject area), for example, you'll see a "Y" for students who are full time, or an "N" for students who are not full time. You'll likely see a dash for a null answer. That's fine. Unfortunately, about half way down a lengthy report, you'll probably forget what the "Y" and "N" actually mean.

In one simple example of what SQL can do, the Column Formula for the Full-Time Student Indicator column could be modified so that the words "Full Time" can replace the "Y" for any student who is full time, and the words "Part Time" or some other negative indicator could replace the "N." You could even replace the dash with the word "Unknown" if that made sense in this context. It would then be clear, when glancing at that column at any point in the report, what the column represents.

In our example in this workshop, we're not just making a cosmetic change. We're going to change any numeric value greater than a one in a specific data column into a zero. That way, when we sum that column, our totals won't be skewed. We'll use SQL to do that.

Is There a List of Commonly Used SQL Code?

Because SQL coding is written on-the-fly, and is custom for every situation in which it's used, it's impossible to come up with a list of coding that would be of benefit to many people.

SQL Coding Used in This Workshop

- CASE WHEN "Pcard Transactions"."Doc Line Number" = 1 THEN 1 ELSE 0 END

More Information

You can find out just a bit more about SQL coding by turning to **Appendix A: SQL Examples.**

More extensive information is available in the online **Analytics Help** documentation. Search for "SQL."

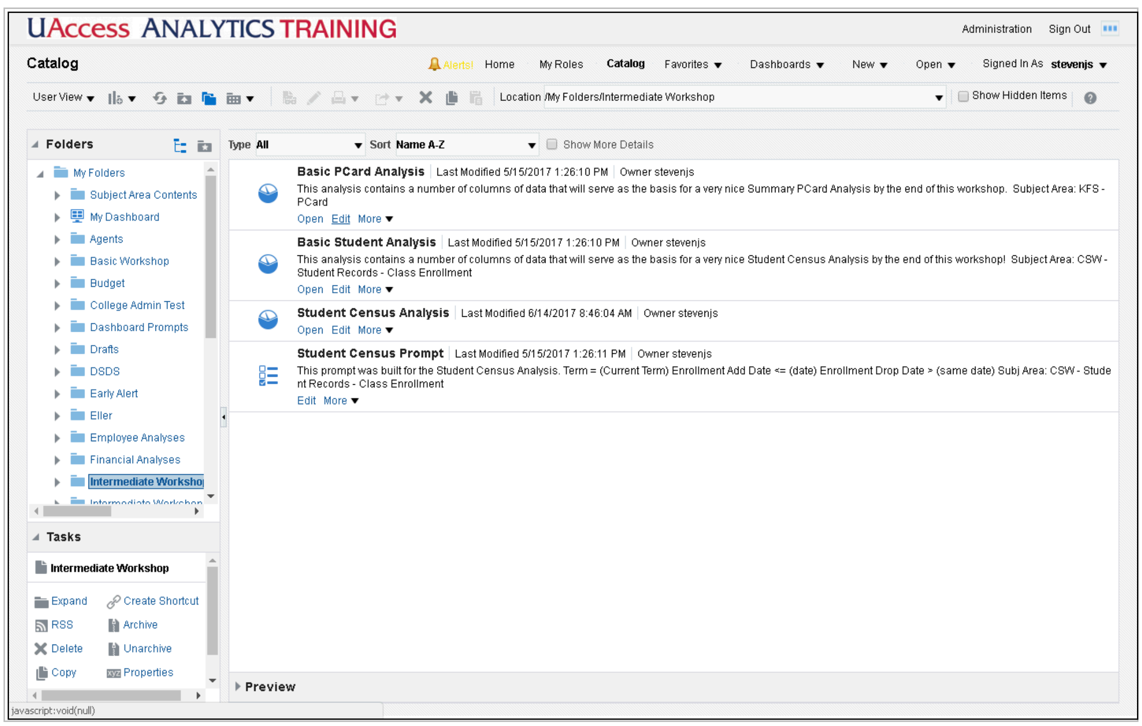
Adding SQL Coding to a Column Formula in the PCard Analysis

Criteria Tab - Doc Line Number Column

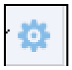
Procedure

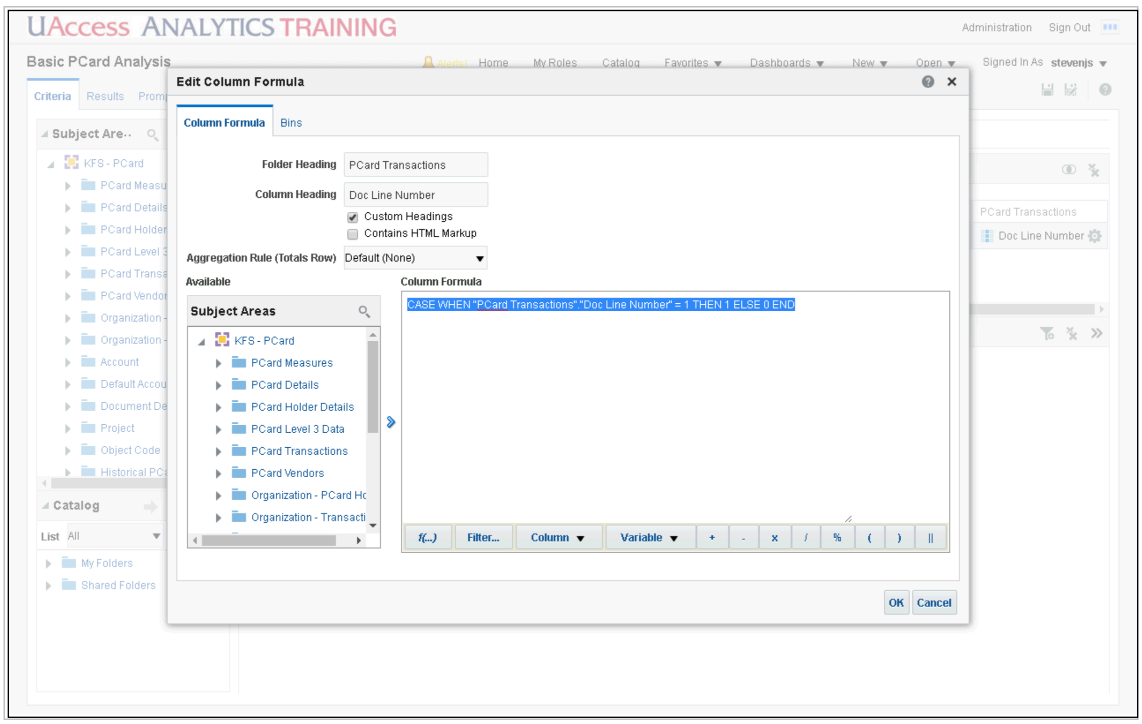
Edit the Basic PCard Analysis to make sure it properly counts the number of transactions in a given month and shows summary spending data for your department's pcards for that month.

Step	Action
1.	Open and edit the **Basic PCard Analysis**. Click the **Catalog** link. Catalog



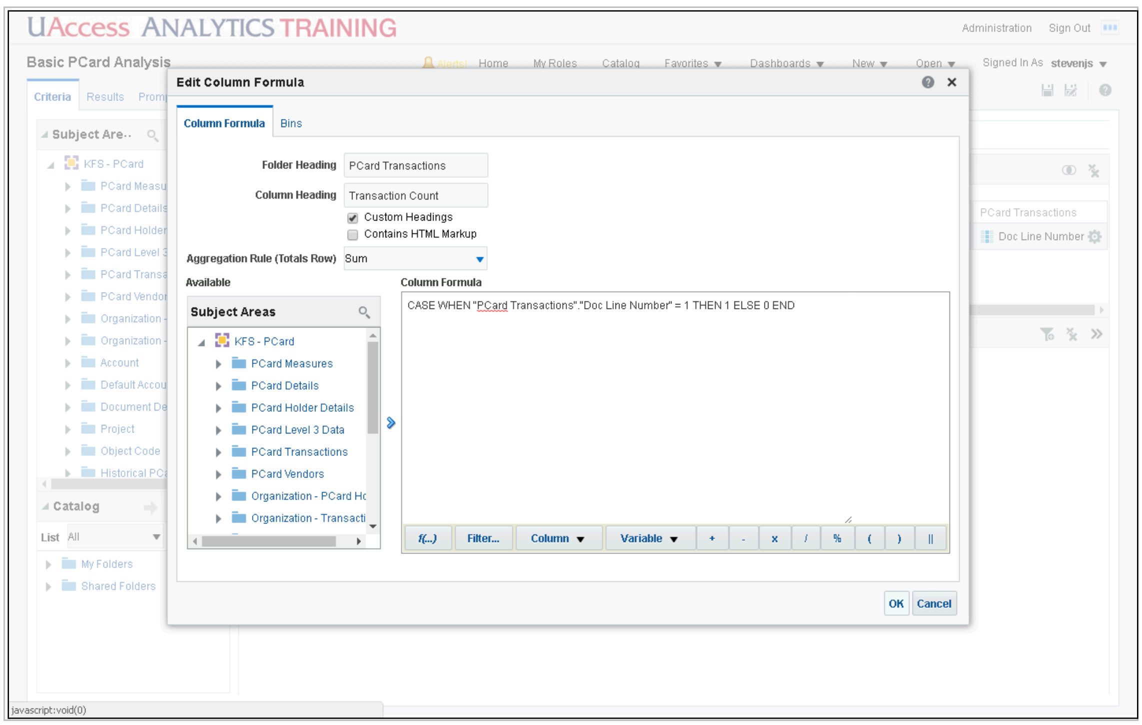
Step	Action
2.	The Catalog opens in the last folder you'd accessed. The **Basic PCard Analysis** should be visible to you. Click the **Edit** link. Edit

Step	Action
3.	Locate the **Doc Line Number** data column. You may have to scroll to the right, as it's the last column in the analysis. Click the **Options** button. 
4.	Click the **Edit formula** list item. 



Step	Action
5.	The SQL code to translate the data in the **Doc Line Number** column has already been entered for you. In English, the code reads "Given the case when the data in the column equals a one, display a one. Otherwise, display a zero."
6.	You need to make a couple of additional changes to the way the data column is being displayed. For example, the name of the data column in the **Column Heading** field is no longer accurate and should be changed. Press the left mouse button and drag the mouse to select the desired text.

Step	Action
7.	Enter "**Transaction Count**" in the field.
8.	Now change the Aggregation Rule. It's currently set to Default (None), which means the data won't be summed even if you wish it to be. Click the button to the right of the **Aggregation Rule (Totals Row)** field. 
9.	Click the **Sum** list item. 



Step	Action
10.	Click the **OK** button. 
11.	**End of Procedure.**

Analytics Variables

About Analytics Variables

About Analytics Variables

What are Analytics Variables?

Variables, as they pertain to UAccess Analytics, are bits of code that can be used as replacements for hard-coded values in a filter. The variables that we typically use are known as **Repository Variables**.

Why Use Analytics Variables?

Most reports created in UAccess Analytics are built to display data from a particular time frame, and it's one of the filters in the analysis that set the time frame. When the report is first created, the report builder will often create a filter like "Term Description *is equal to / is in* Spring 20__" or "Fiscal Period Number *is equal to / is in* Period 7." There's nothing wrong with those filters. They work for the specific day that the person created the report. What happens, however, the following term or the following month? The person who created the report will likely have to edit that report and modify the filter to correspond to the current term or the current month.

Rather than hard-coding specific values into a filter, the report builder can use variables. Rather than a filter that points to Spring 20__, the filter would read "Term Description *is equal to / is in* [Current Term]". The Fiscal Period filter would read "Fiscal Period *is equal to / is in* [Previous Fiscal Period Number]." That way, no matter when the analysis is run, it will always show data from the Current Term or from the Previous Fiscal Period. The analysis and filter will never have to be modified to accomodate a changing calendar.

Where Can I Find a List of Variables?

All of the variables that can be used in Analytics are listed on the Variables dashboard. You can find that dashboard in Analytics by navigating to **Dashboards > UAccess Analytics > Variables**.

Variables Used in This Workshop

- PREV_FISCALPERIOD_ST_DT
- PREV_FISCALPERIOD_END_DT
- PREF_FPERIOD_NAME

More Information

There is very limited information about variables in the online **Analytics Help** documentation.

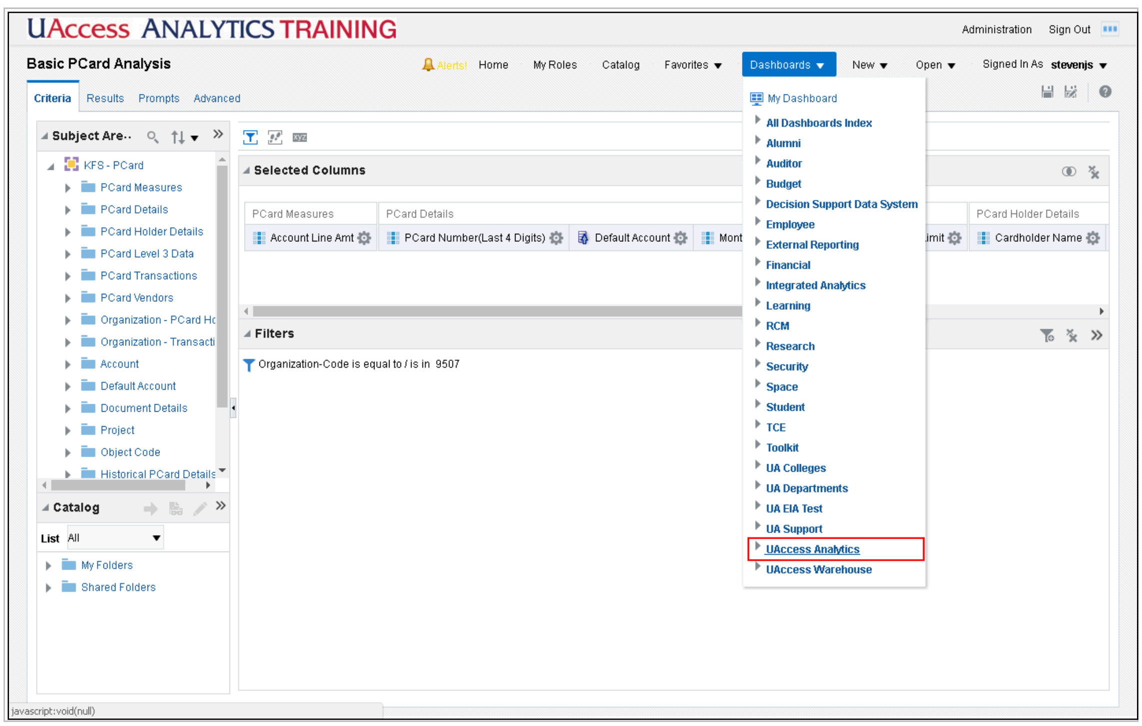
For additional information, please download the **Next Steps: Using Variables** document from the **UAccess Community > Resources > Analytics** web page.

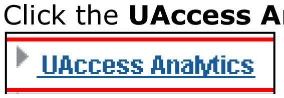
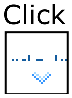
Using the Variables Dashboard

Procedure

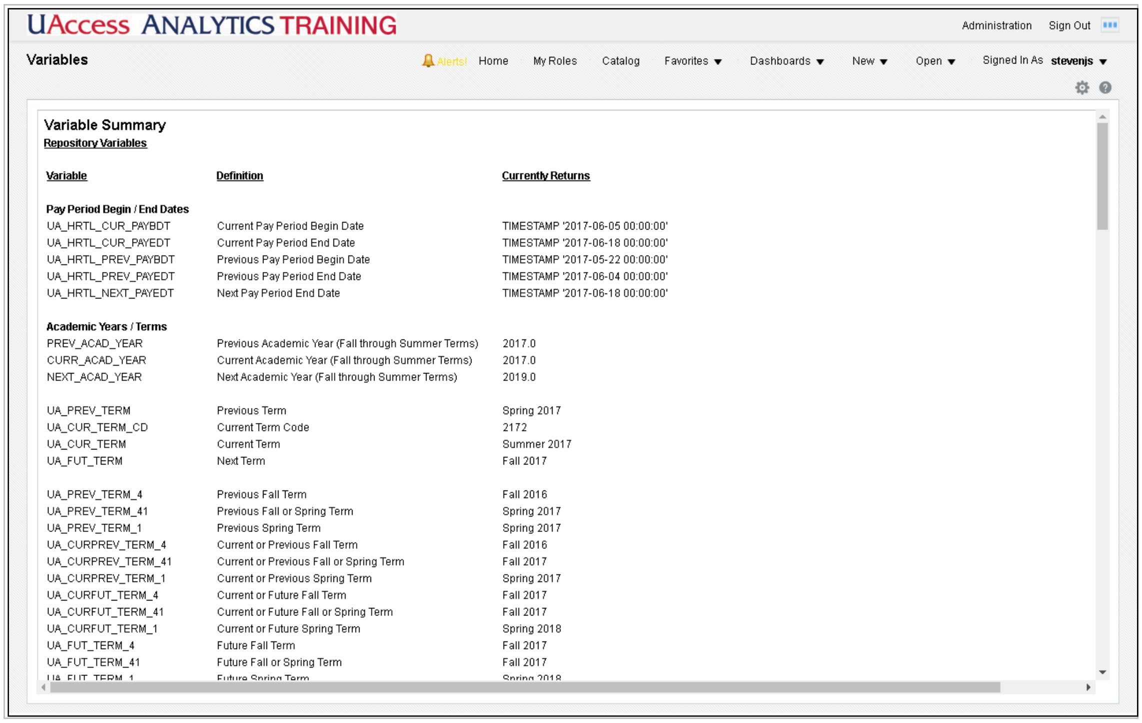
Analytics variables can be used in filters and prompts to provide an easier, automatic means of getting data for "last month" or "the current term."

Step	Action
1.	There is a list of all available variables handily located on a shared Variables dashboard. Click the **Dashboards** link. 

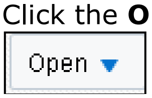
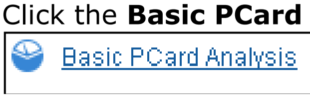


Step	Action
2.	Click the **UAccess Analytics** list item. 
3.	Use the navigation button at the bottom of the Dashboard list to scroll down. Click the **Scroll Down** button. 

Step	Action
4.	Click the **Variables** list item. 



Step	Action
5.	Most of the variables listed on the dashboard are called **Repository Variables.** There's reminder right at the top of the dashboard page, too. The different variables are divided into groups of related or similar variables. Each line of information displays the variable code, the definition, and the value that would be returned if the variable were to be used today.
6.	One easy way to use the Variables dashboard is to start with the **Currently Returns** column. There, you'll want to find any value that resembles the type of data needed for your filter. Once you've discovered your desired information, move to the left to see if the **Definition** matches what you're looking for. Finally, move to the left one more time to identify the actual **Variable** that fits your criteria.

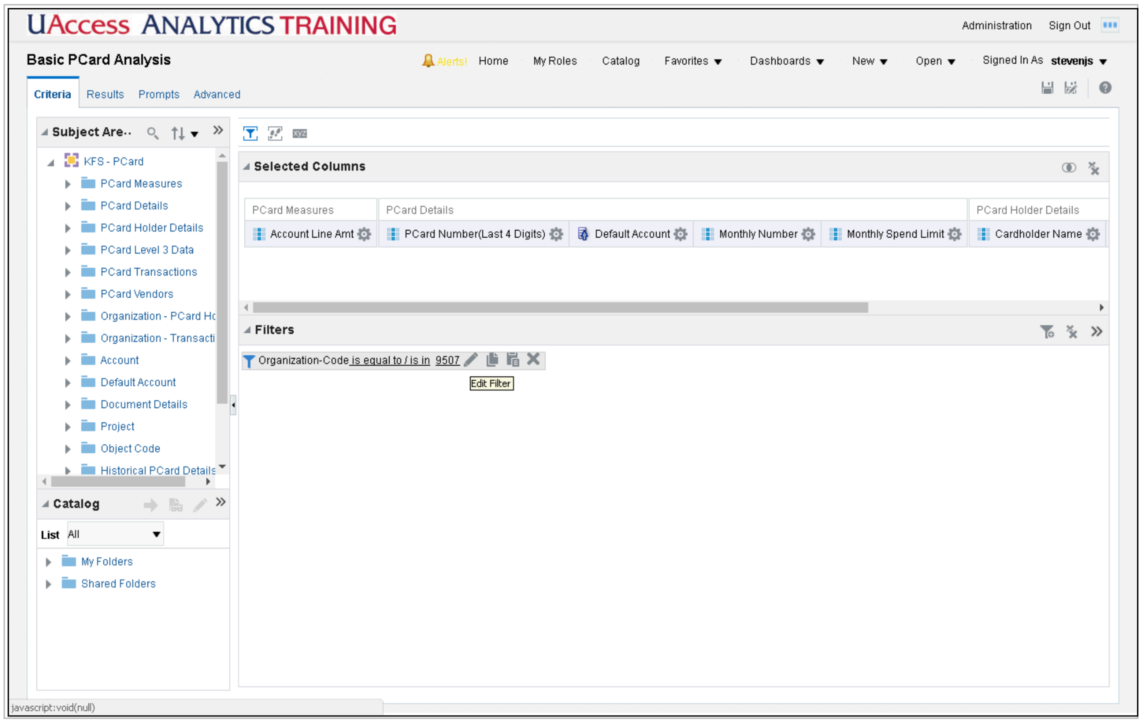
Step	Action
7.	The particular variable you're looking for depends on the particular filter for which you need the variable. The variable you choose must return the same type of data as the value you expect to put in the filter.
8.	For example, if you are filtering for fiscal year, you must choose a variable that sends a four-digit number to your analysis. If you're filtering to a month, you'd select a variable that returned either a month or fiscal period number.
9.	In this situation, you need to filter to "last month." What variables might you select?
10.	Once you've identified the variables you need, you can use your computer to copy them or you can just make a note of them. When you use the variable, it must be entered in the filter *exactly* the way it appears on this dashboard, including capitalization and the underscores in place of spaces. You can navigate back to the **Basic PCard Analysis**. Click the **Open** link. 
11.	Since you just had the Basic PCard Analysis open, it should appear on your Open menu. Click the **Basic PCard Analysis** list item. 
12.	**End of Procedure.**

Adding Analytics Variables to the Filter in the PCard Analysis

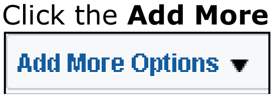
Criteria Tab - Editing the Filter

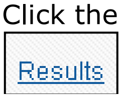
Procedure

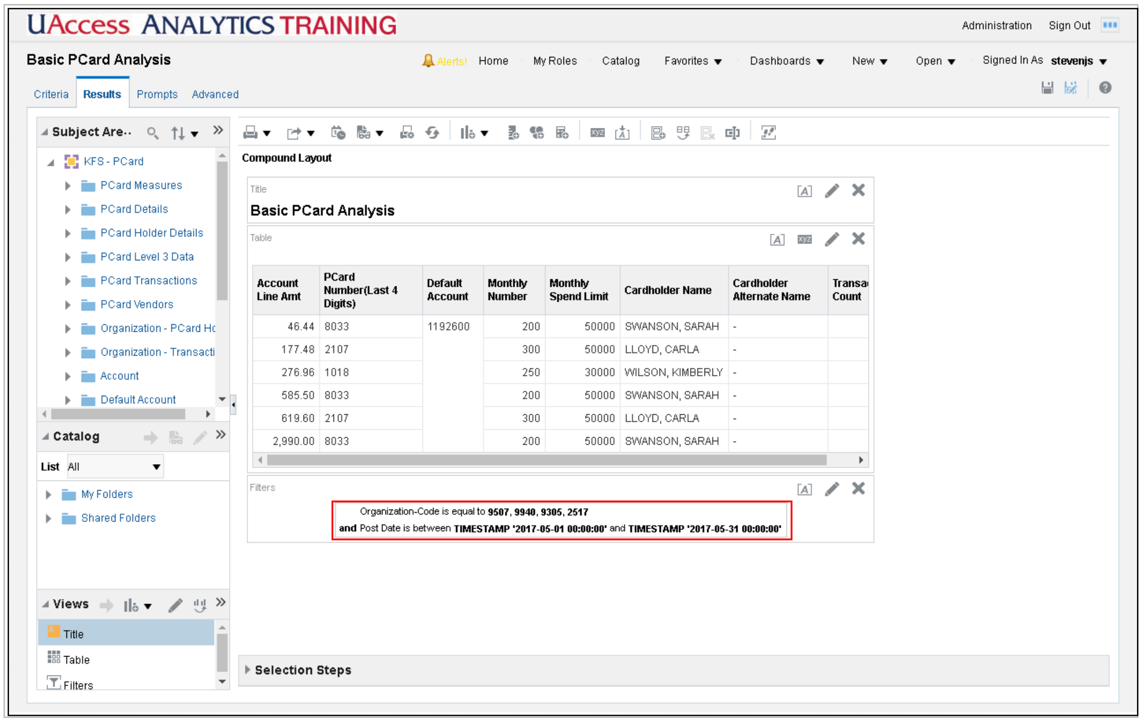
The existing filter refers to someone else's department. Change the value in the existing filter, then add another filter that will show data from last month. Regardless of what month that might be.



Step	Action
1.	Hover your mouse pointer over the existing filter. Click the **Edit Filter** button. 
2.	Erase the existing data from the **Value** field, and enter your own department number(s). Click the **OK** button. 

Step	Action
3.	Now add one more filter to the analysis. You want this report to always show data from the previous month. The data column you need for this filter doesn't exist in the analysis. Because the data in this subject area actually comes from a large banking conglomerate, the subject area is arranged a bit differently. There are no actual date tables in the subject area. There are, however, at least two date data columns. One of them refers to **Post Date**, the other to **Transaction Date**. Which date do you think you should use for this filter? What's the process you need to follow to create a filter using a data column that doesn't exist in the analysis?
4.	The date you're looking for is in the Transactions table. Click the **Create a Filter** button. 
5.	Now that you've selected a data column to use as your filter, you need to determine how to create the filter. If you need to encompass a full month using a single date field, what operator would seem to be the best one to use? Click the button to the right of the **Operator** field. 
6.	Click the **is between** list item. 
7.	In order to have the analysis always default to "last month," you can use variables in the filter. Variables cannot be entered directly into the Value fields. Click the **Add More Options** button. 
8.	What type of variables were those you looked at on the Variables dashboard? Which option should you choose here? Click the **Repository Variable** list item. 

Step	Action
9.	Add a second Repository Variable field right away. You need one for the beginning of the month and another for the end of the month. Click the button to the right of the **Add More Options** field. 
10.	Click the **Repository Variable** list item. 
11.	Now enter the variables into the new fields. Enter "**PREV_FISCALPERIOD_ST_DT**" in the **Repository Variable** field.
12.	Enter "**PREV_FISCALPERIOD_END_DT**" in the **Repository Variable** field.
13.	You're ready to try the filter. Click the **OK** button. 
14.	You can see the filter has been added, along with a few bits of extra "stuff" to make them work properly. Click the **Results** tab. 
15.	There's your report. What view can we add that will allow you to see the filters without going back to the Criteria tab? Click the **New View** button. 
16.	Click the **Filters** list item. 



Step	Action
17.	You can now verify that the filter is showing data from your departments for "last month", whatever month that happens to be. You can save the report and give it a new name. Click the **Save As** button. 
18.	Enter "**Summary PCard Analysis**" in the **Name** field.
19.	Click the **OK** button. 
20.	Good job! **End of Procedure.**

Pivot Tables

About Pivot Tables

About Pivot Tables

What are Pivot Tables?

Any explanation of pivot tables requires a two-sentence explanation of a standard reporting table. A table is a "flat" data presentation tool, with data simply displayed in rows and columns. Tables are two-dimensional reporting tools.

A pivot table, on the other hand, can provide a three-dimensional view of data. Pivot tables present the data assembled in rows, columns, and measures, which creates an unweighted cross-tabulation. A pivot table is a great data summarization tool that can automatically sort, count, total, or average data.

Users can set up and change the structure of the data in the pivot table by dragging and dropping fields into different row, column, or measures locations. This rotation or pivoting gives the tool its name.

Why Use Pivot Tables?

As described above, pivot tables provide a more robust three-dimensional view of the data that can't be found or seen using other reporting tools. They are also a great way to summarize data. Rather than looking at a detailed view of expenses by account over a given period of time, a pivot table can help summarize the expense data into just a few rows. Pivot tables can also breaking up the data by using the values in some other data column as column headers.

We'll use both of these functions in this workshop.

More Information

For additional information, please search for "Pivot Table" in the online **Analytics Help** documentation. There are at least seven specific topics available about pivot tables.

You might also wish to download the **Working with Pivot Tables: Putting a Spin on Your Data** document from the UAccess Community.

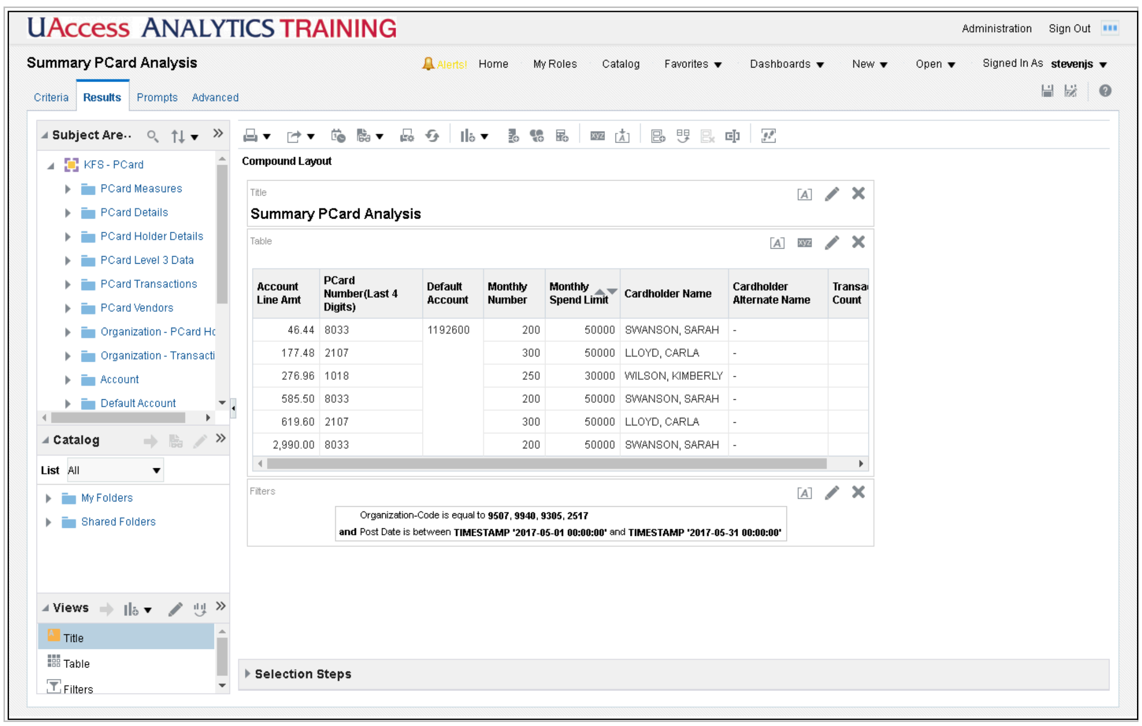
Adding a Pivot Table to the PCard Analysis

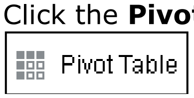
Results Tab - Pivot Table

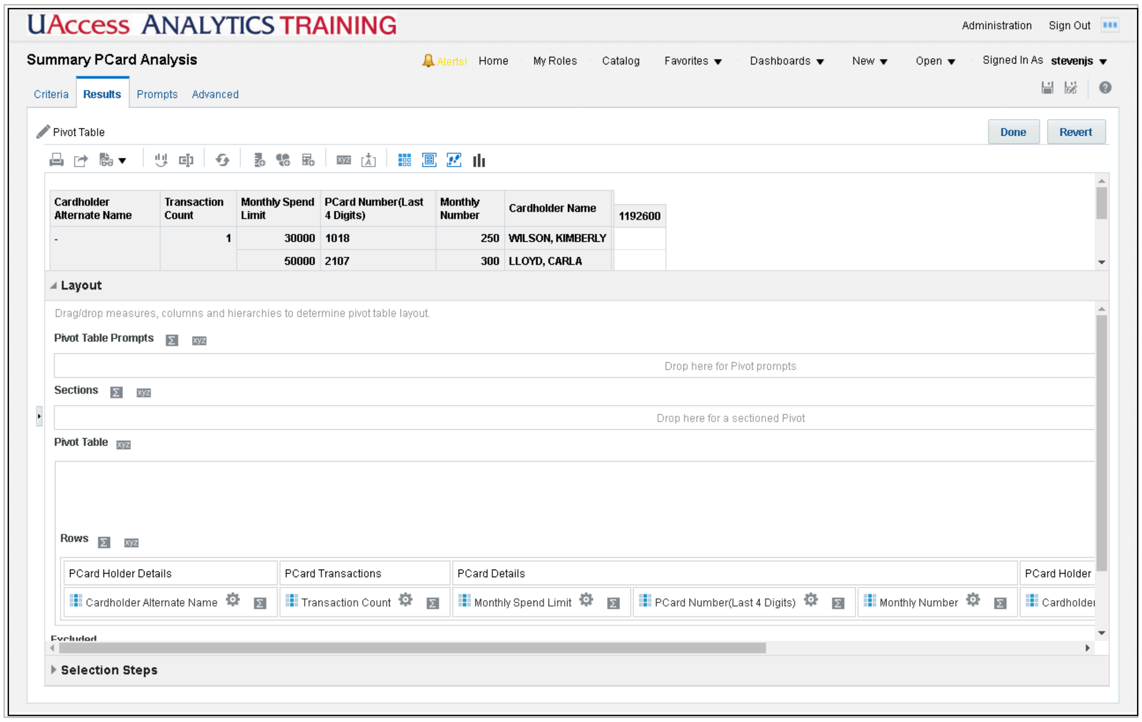
Procedure

You have modified a column formula and the filter on the Criteria tab.

It's time to work on the Results tab. The default results are shown in a table. You will add a pivot table to the Results tab in order to more readily add percentages to the results.

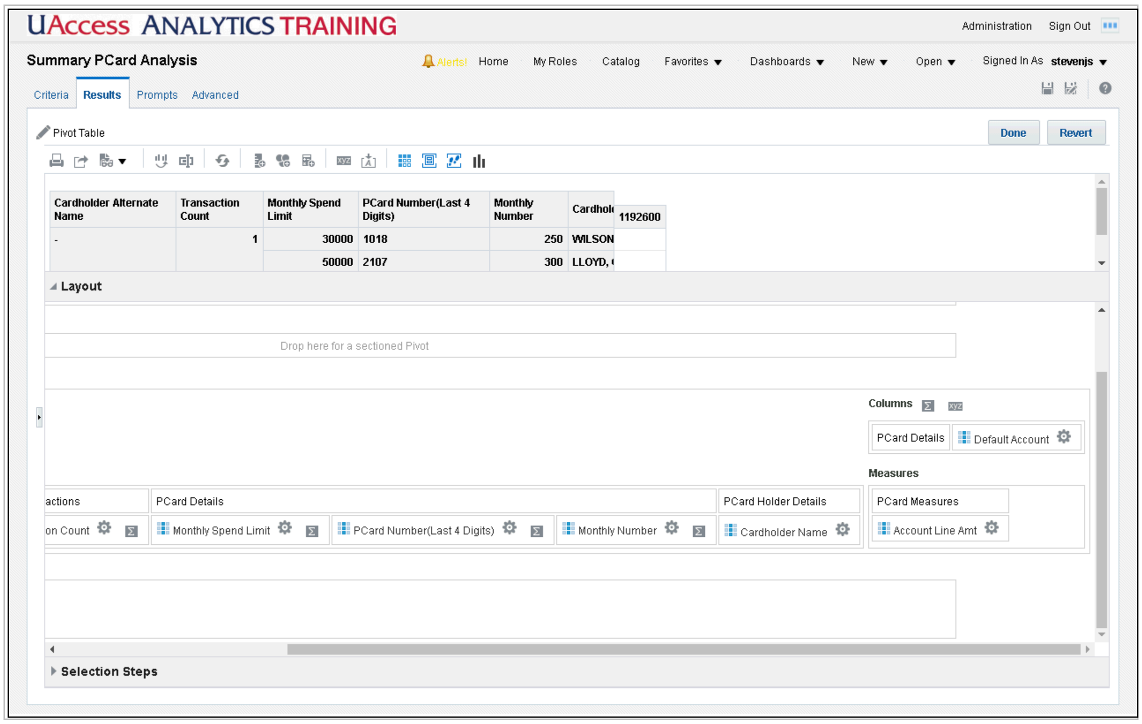


Step	Action
1.	This is a very basic report, but you will make it better. Much better! Start by adding a pivot table. You can use the **New View** icon in the **Views** pane in the lower left corner of the screen. Click the **New View** button. 
2.	Click the **Pivot Table** list item. 

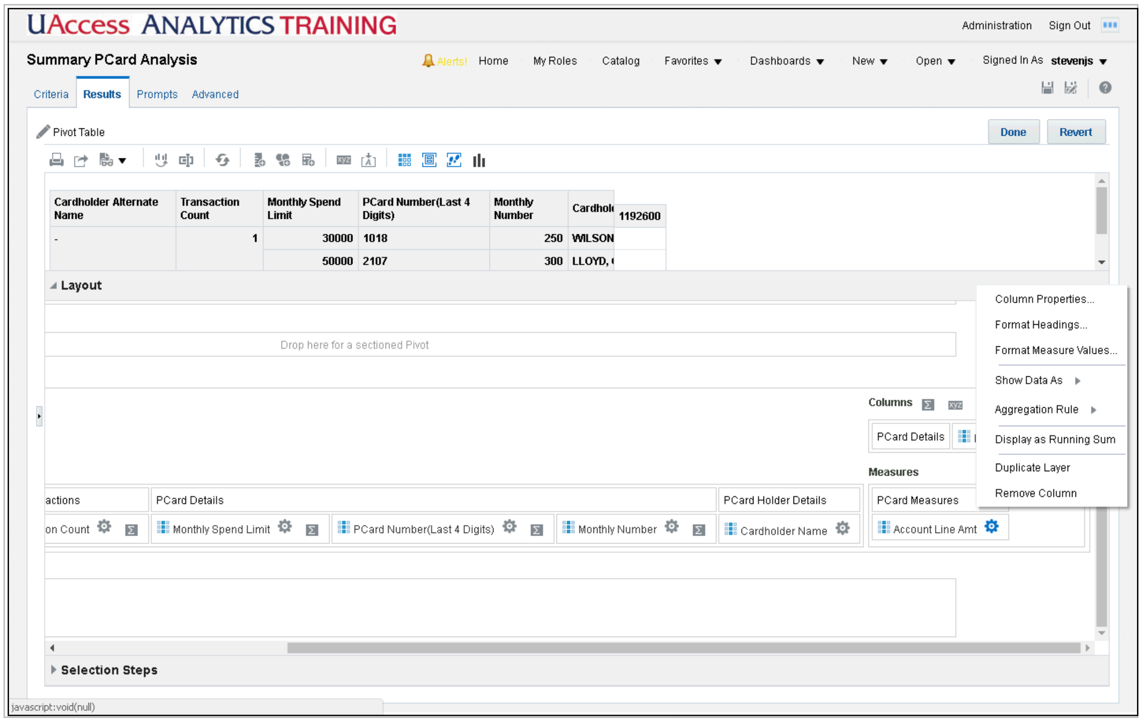


Step	Action
3.	This is the **Pivot Table** editing screen. The left-hand column has been collapsed to make more room. This screen is very similar to the Table editing screen that you've seen before. The **Layout** pane has similar areas. If you drop a column into the **Pivot Table Prompts** area, you will get a drop-down menu of the values in that column. If you drop a column into the **Sections** area, you will get one pivot table for each value in that column of information.
4.	The **Pivot Table** area has a big box in it. Inside that box, you see three smaller areas. Most of the data columns in the analysis have dropped into the **Rows** area. It's called rows because the data is displayed in rows, just like a regular table.
5.	There are two more areas to the right. The small area on top is named **Columns**. If you drop a column of information into that area, you will get one column for each of the available values. This is also where the Measure Labels box is usually placed. The final area is named **Measures**. This is where you will typically put any numeric data columns that you need to sum or otherwise manipulate.

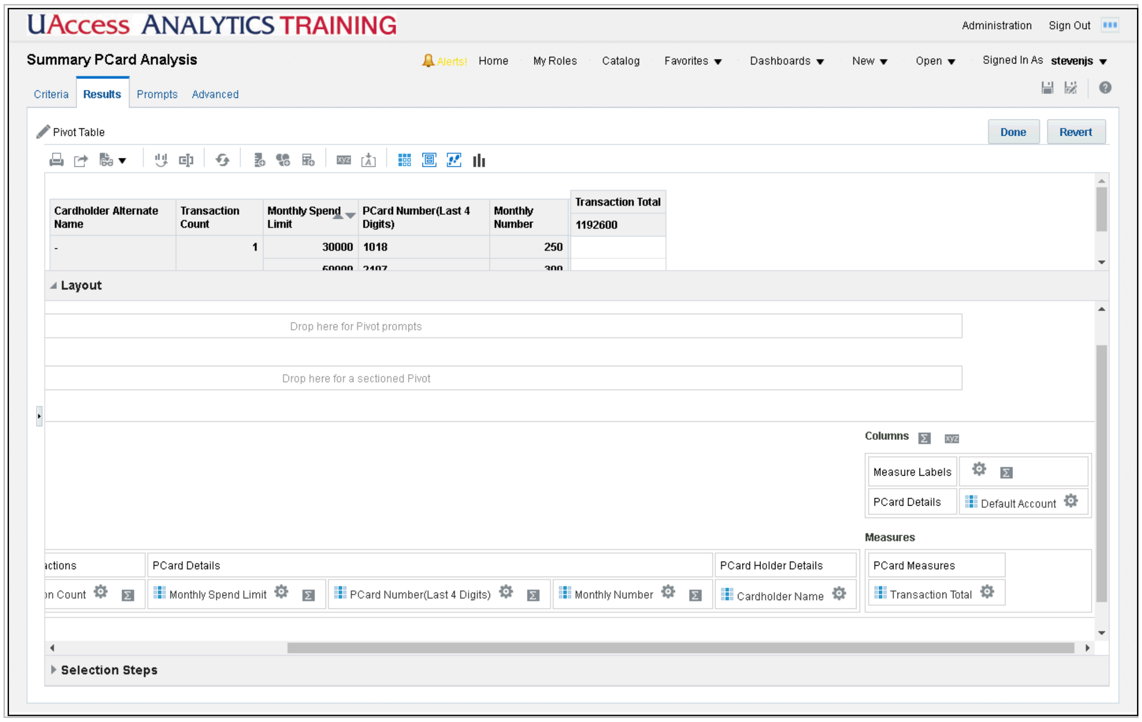
Step	Action
6.	The final area on the Layout pane is the **Excluded** area. You know that dropping a column into that area excludes it from the view you're working with. Right now, there's something in there called **Measure Labels**. You'll use that in a few moments.



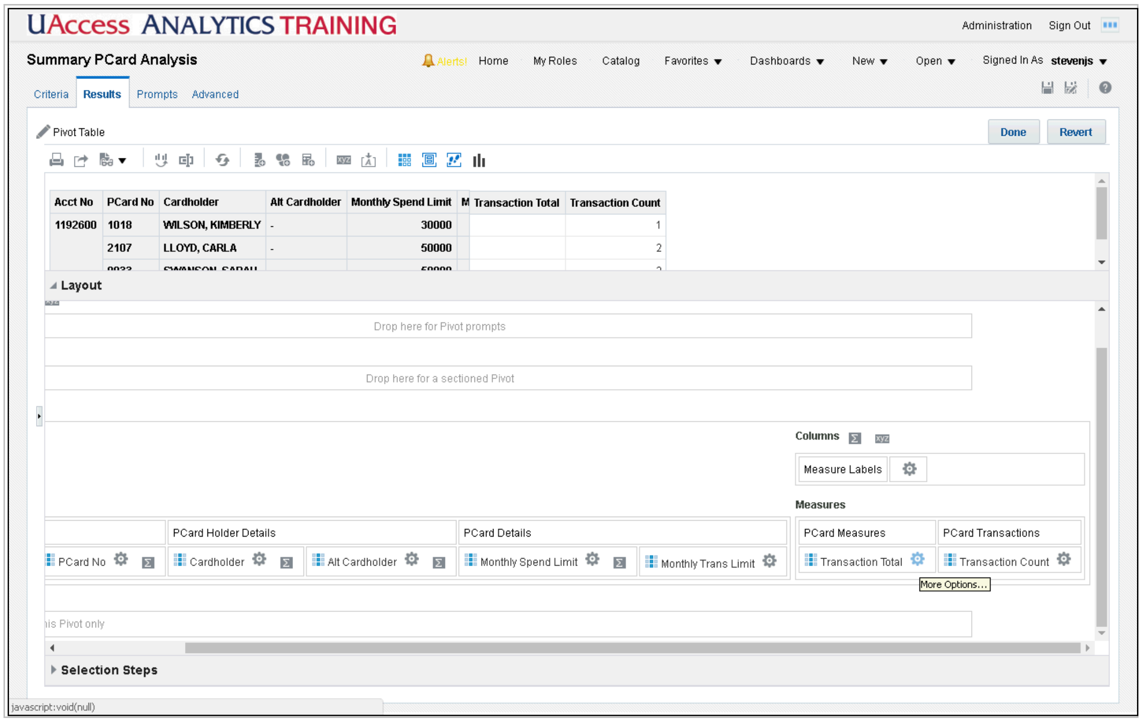
Step	Action
7.	Let's get started with this pivot table. We should identify the number columns and put them in the right location. First off, locate the **Account Line Amount** data column and move it into the **Measures** area. You can also rename the column. Click the **More Options** icon. 

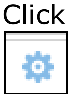
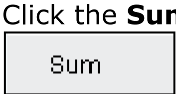


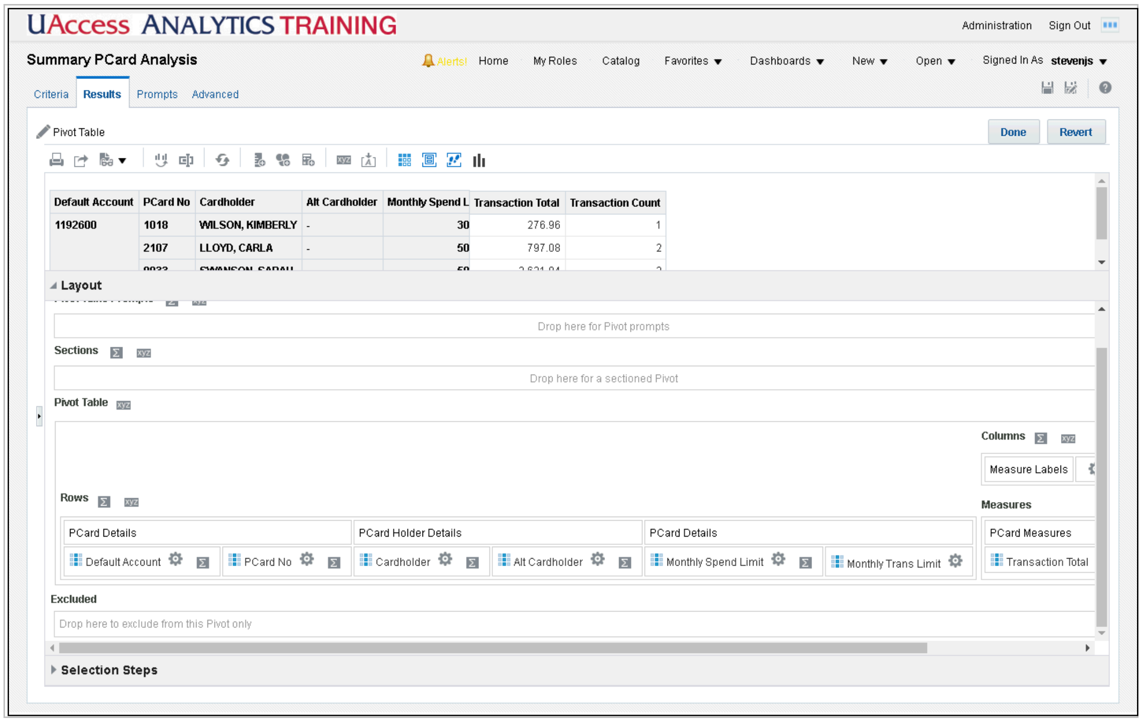
Step	Action
8.	Now rename it. Click the **Column Properties** list item. Column Properties...
9.	Click the **Column Format** tab, then check the **Custom Headings** checkbox. ***Note:*** *Using the Column Properties screen rather than the Format Headings screen changes the name of the data column on both the Results tab and the Criteria tab.* Enter "**Transaction Total**" in the **Column Heading** field.
10.	Click the **OK** button. OK



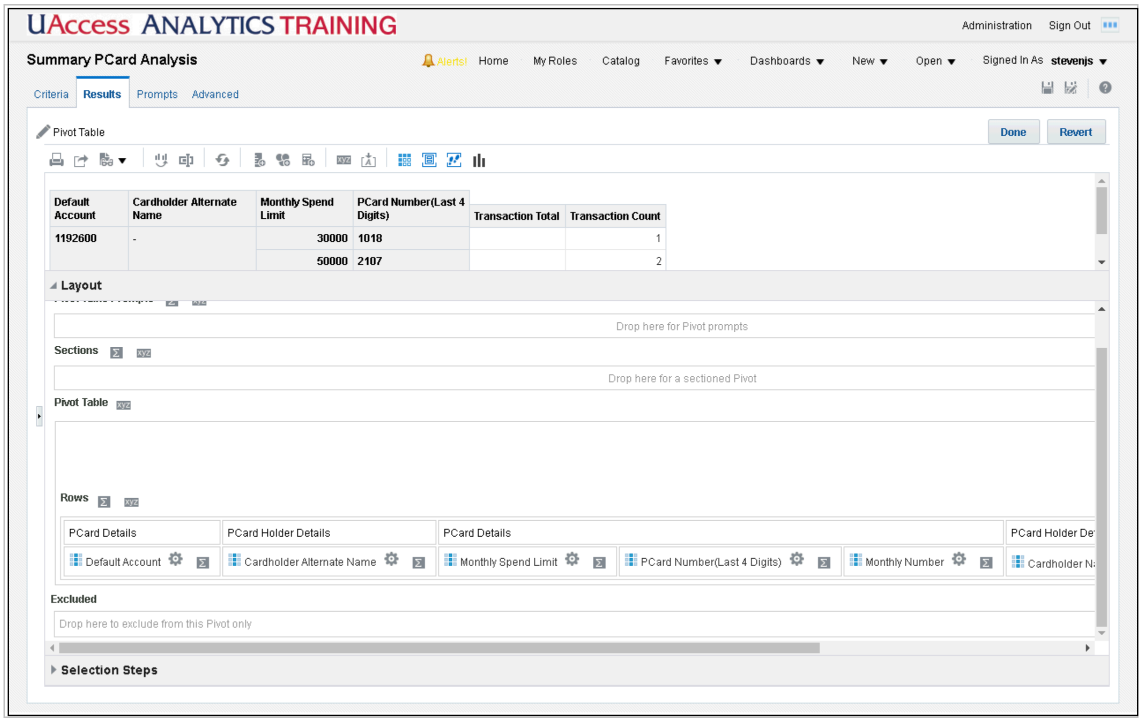
Step	Action
11.	Now move the **Measure Labels** item from the **Excluded** area to the **Columns** area. This Measure Labels item is just what is sounds like. It's the label for the columns of information that live in the Measures area. Because you will soon have more than one column in the Measures area, labels are required. You can also move the Default Account data column out of the Columns area and into the Rows area. Release the mouse button.
12.	Move the **Transaction Count** column into the **Measures** area, dropping it to the right of the Transaction Total column.



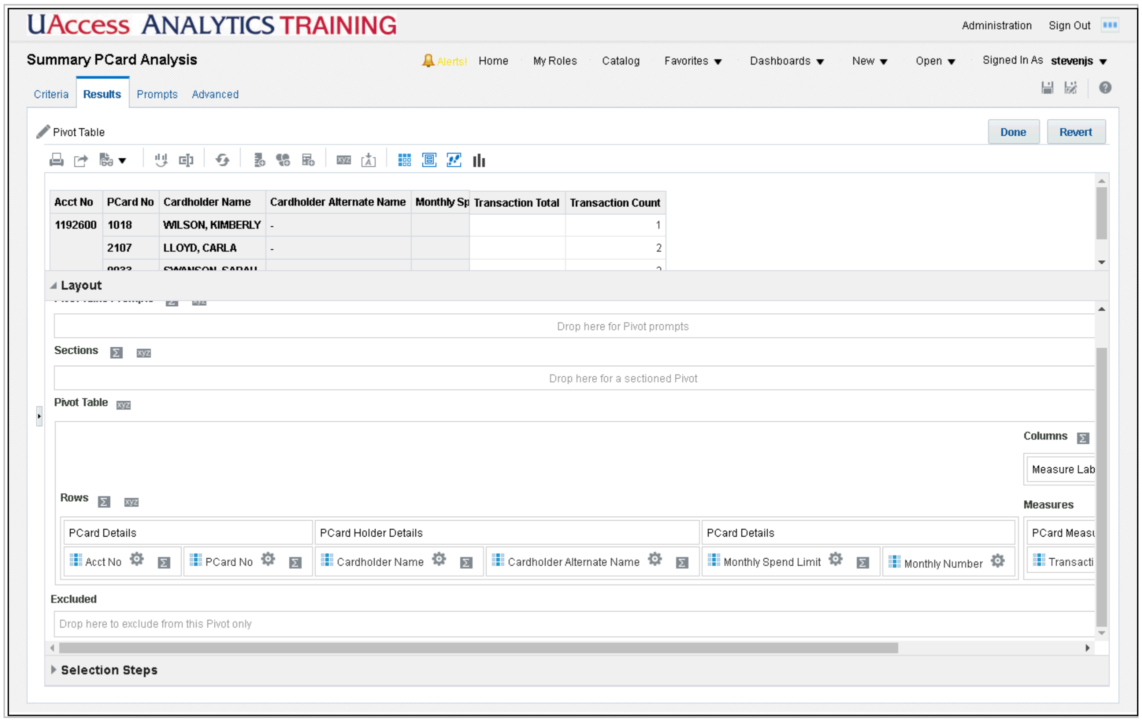
Step	Action
13.	If you look at the **Transaction Total** data column in the upper Preview section of the screen, you'll see it's blank. That's because the system doesn't recognize that the data is numeric. You'll have to tell it so. Click the **More Options** button. 
14.	Click the **Aggregation Rule** list item. 
15.	Click the **Sum** list item. 
16.	You can see that the **Transaction Total** data column in the upper Preview section of the screen now contains numeric values.



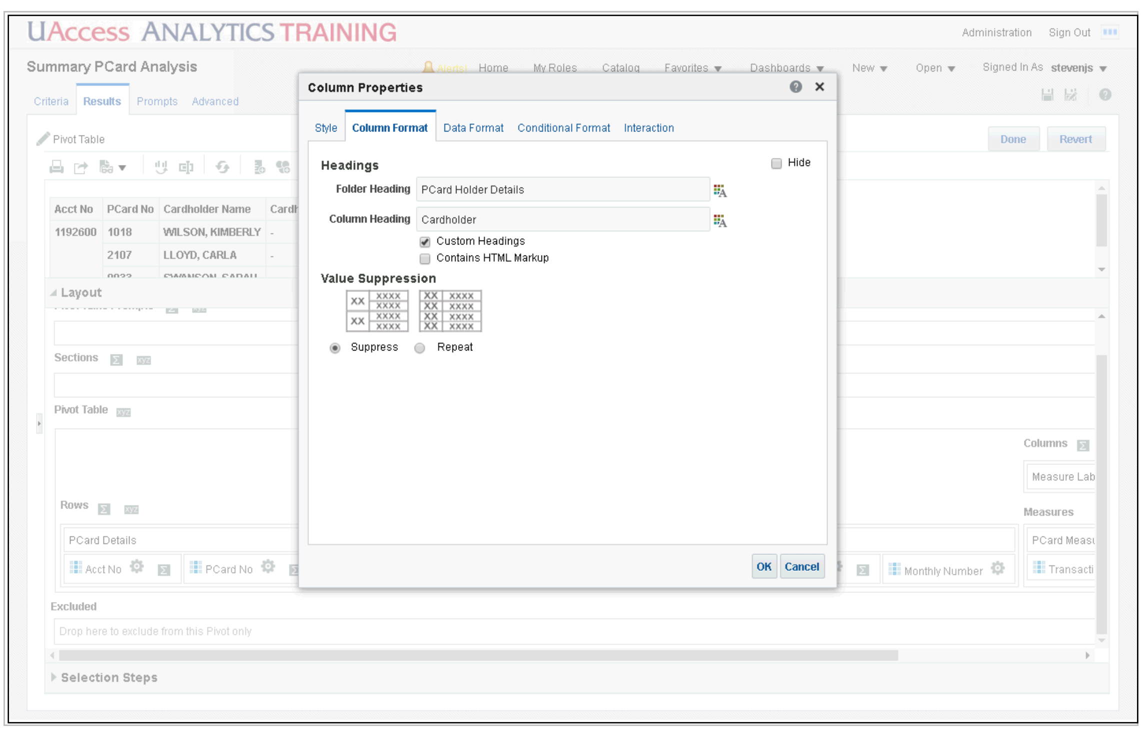
Step	Action
17.	Rearrange the rest of the columns in the Rows area to get them into a logical order. You can also rename some of them to make the analysis a bit more user-friendly. Move the **Default Account** to the far-left end of the **Rows** area. Release the mouse button.



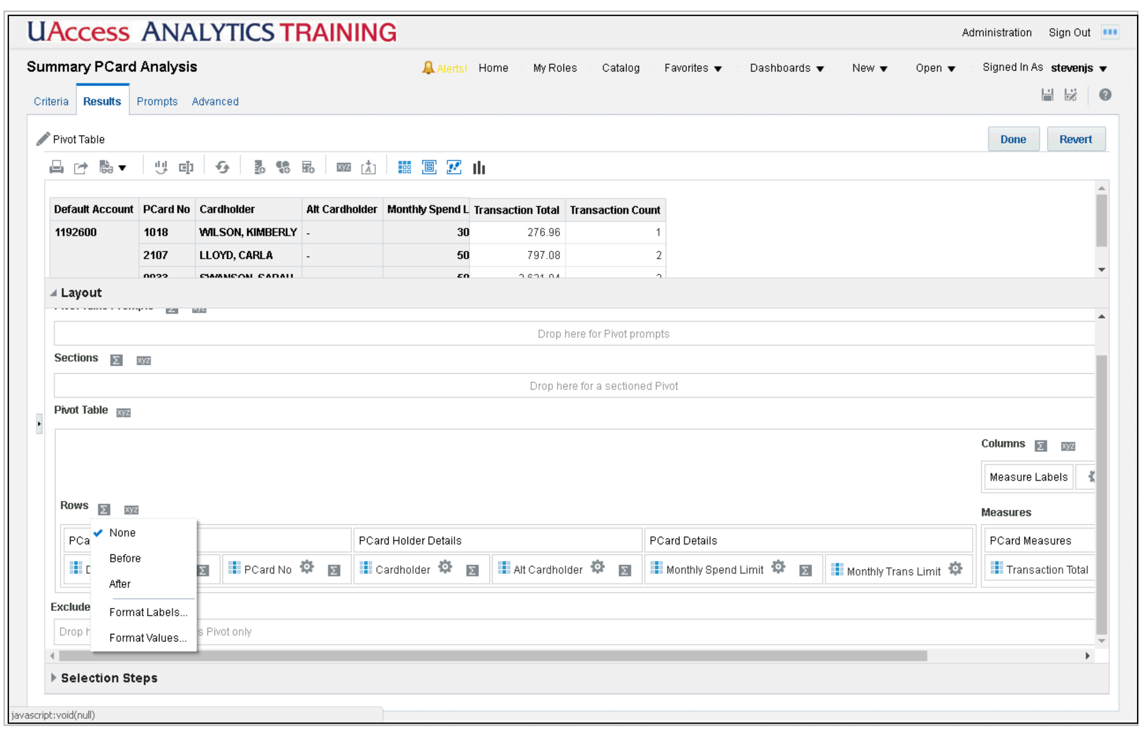
Step	Action
18.	Now rename that column. Click the **More Options** button. 
19.	Click the **Column Properties** list item. Column Properties...
20.	Check the **Custom Headings** checkbox. Enter "**Acct No**" in the **Column Heading** field.
21.	Click the **OK** button. OK
22.	Locate the **PCard Number** data column and move it to the second position in the Rows area. Rename it and call it **PCard No**. Click the **More Options** button. 



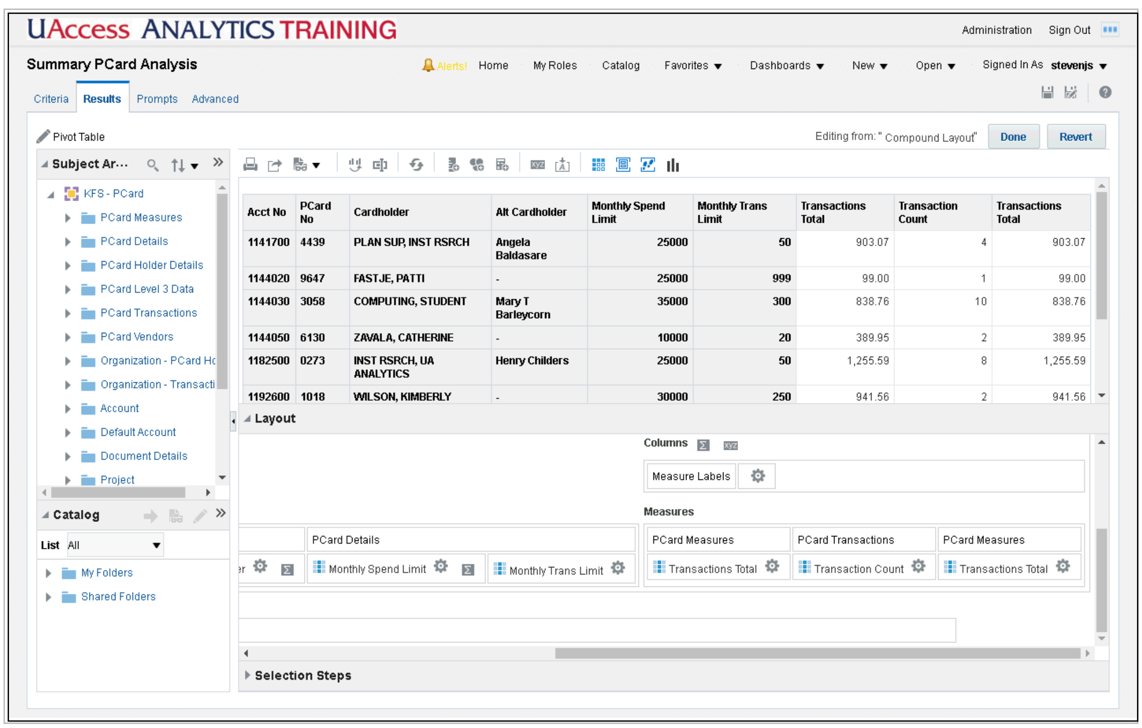
Step	Action
23.	Now move the **Cardholder Name** column into place... Release the mouse button.



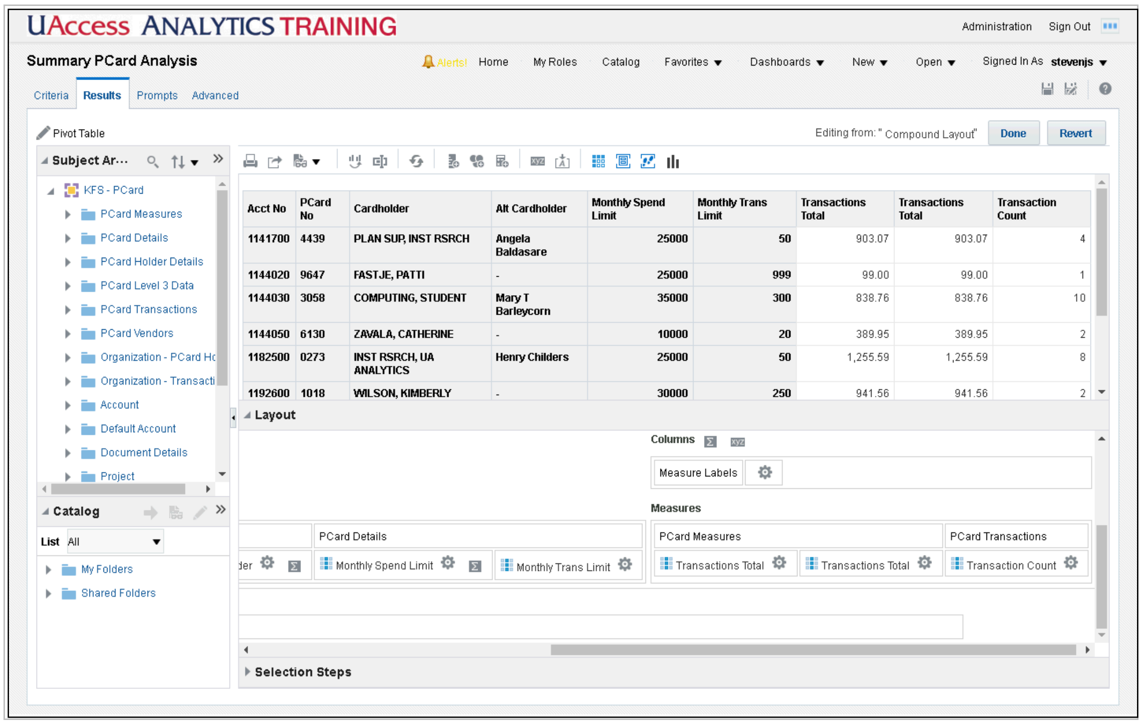
Step	Action
24.	...and rename it just like you've done with the other data columns. Click the **More Options** button first, then click the **Column Properties** list item. On the **Column Properties** screen, using the **Column Format** tab, put a check mark in the **Custom Headings** box, then name the column **Cardholder.** Click the **OK** button. 
25.	The Cardholder Alternate Name column is already in the right spot. Just rename it to **Alt Cardholder**.
26.	The last two columns are already in the right places. The name of the **Monthly Spend Limit** column is fine. You needn't change it. Change the name of the **Monthly Number** data column to **Monthly Trans Limit**.
27.	Perhaps you should add a grand total to the bottom of the pivot table. Use the **Totals** (sigma) button located in the **Rows** area. Click the **Totals** button. 



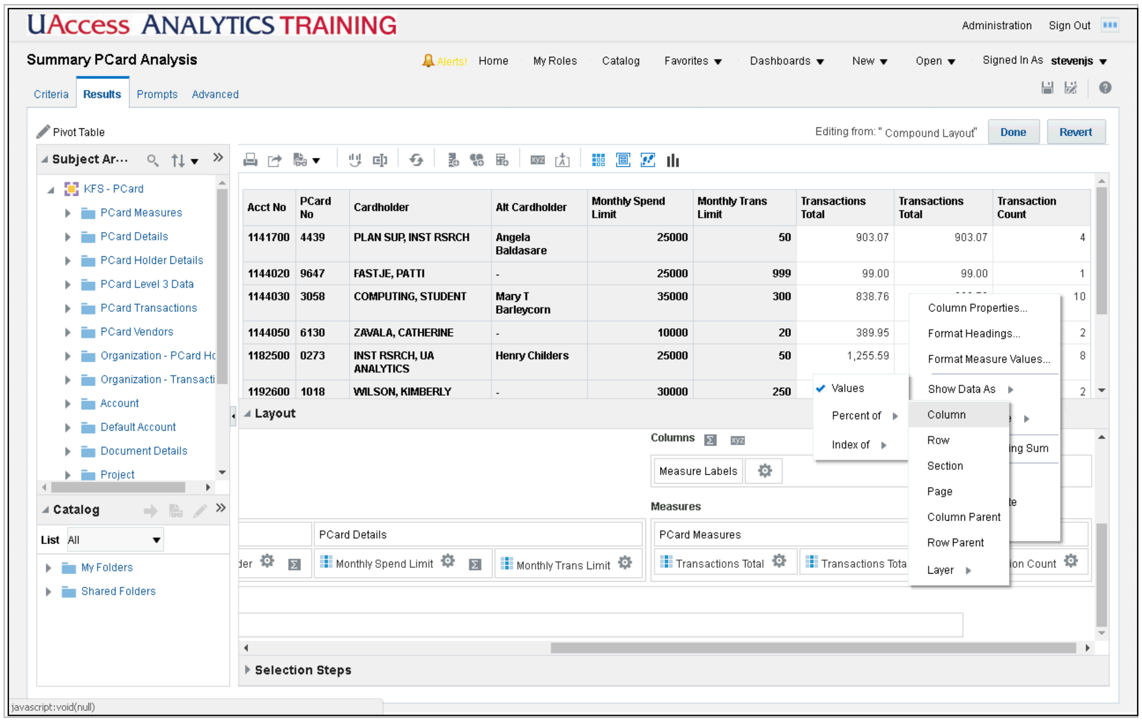
Step	Action
28.	Click the **After** list item. After
29.	So far, the pivot table doesn't look much different than the standard table. There are things that are very easy to do with pivot tables that are not at all easy with tables. For example, you can add percentages!
30.	First, duplicate the Transactions Total column. Click the **More Options** icon.
31.	Click the **Duplicate Layer** list item. Duplicate Layer



Step	Action
32.	The duplicate drops in on the right. Move that column and place it to the right of the original column. Release the mouse button.

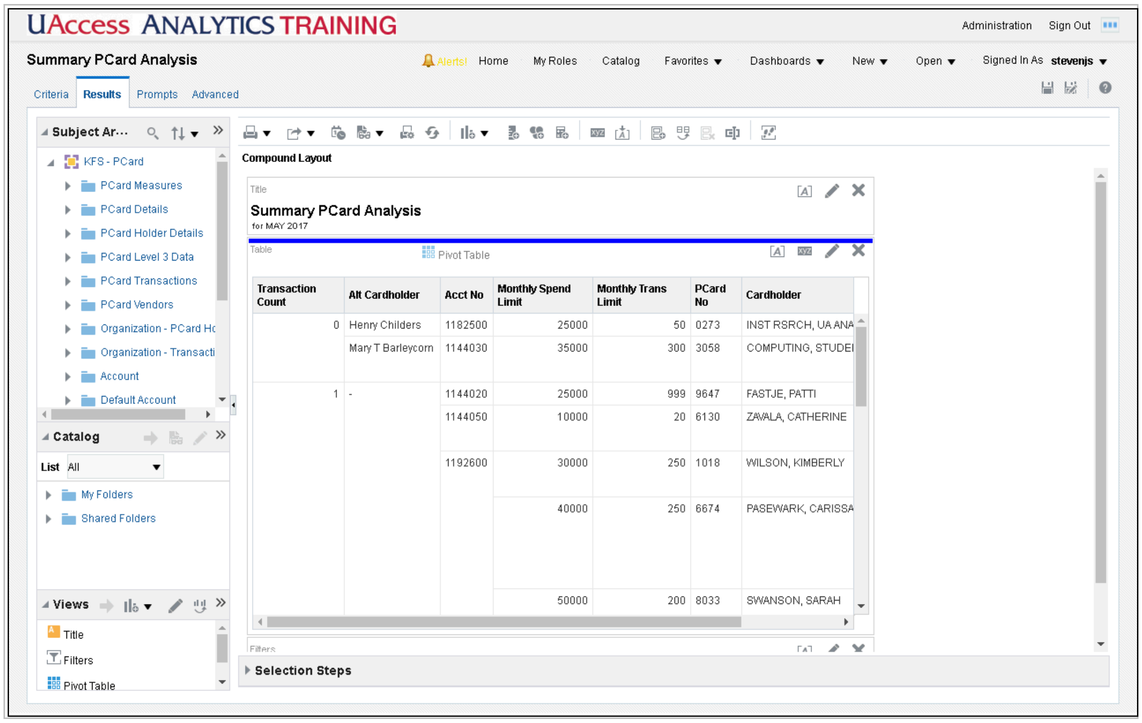


Step	Action
33.	Now set this duplicate column to display percentages. Click the **More Options** icon. 
34.	Click the **Show Data As** list item. 

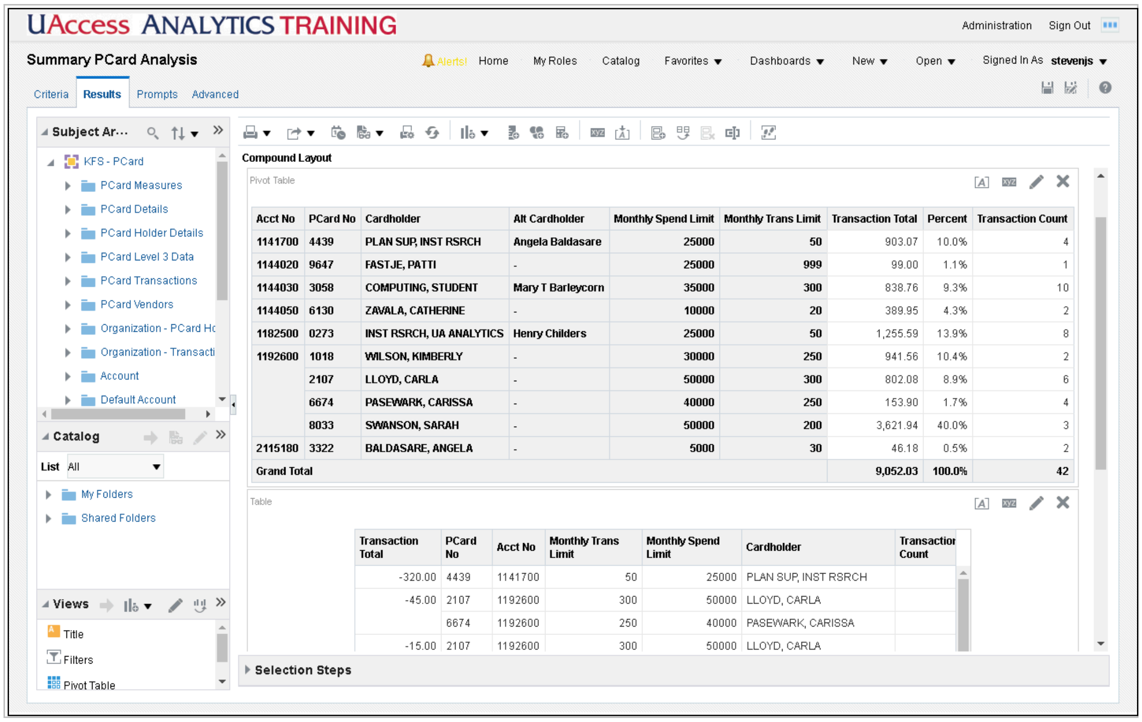


Step	Action
35.	Click the **Percent Of** list item. Percent of
36.	Click the **Column** list item. Column
37.	You should rename the column, too. Because you're working with a duplicate column, the process is slightly different. Click the **More Options** icon. 
38.	Click the **Format Headings** list item. Format Headings...
39.	Enter "**Percent**" in the **Caption** field.
40.	Click the **OK** button. OK

Step	Action
41.	See how easy that was? That's one of several reasons to use pivot tables. You're done editing the Pivot Table at this point. Click the **Done** button. Done



Step	Action
42.	Because you used the **New View** button from the **Views** pane to create the pivot table, the pivot table will not be automatically included in the Compound Layout. You can either click the **Add View** button in the **Views** pane to add the highlighted view - the pivot table - or you can drag-and-drop the pivot table into place. Watch for the dark blue line and drop the pivot table between the **Title** view and the **Table** view. Release the mouse button.



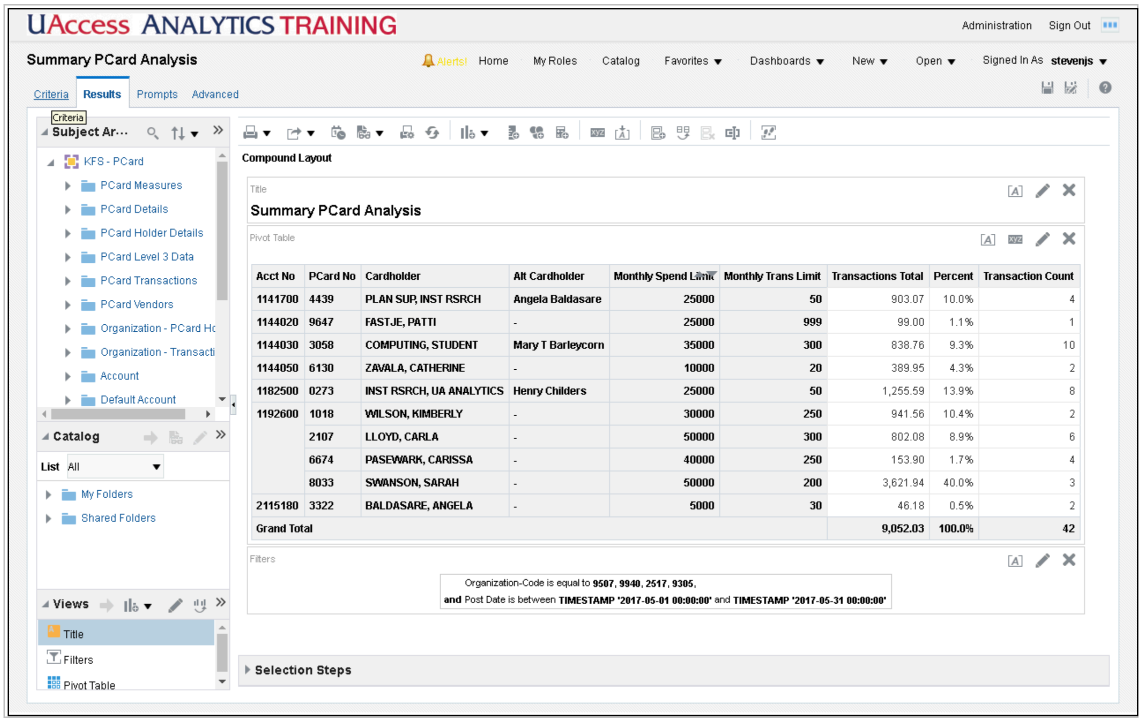
Step	Action
43.	Take a look at the difference between the pivot table and the table! The pivot table has summary data, and the value-added percentage column. The table is showing detail information. The data is valuable, but you wanted a summary analysis. The pivot table provides that view.
44.	The Table view isn't really serving a purpose any longer. You can delete it, using the **Views** pane. ***Note:*** *Be sure you highlight the Table view first!* Click the **Remove View from Analysis** button. 
45.	That looks pretty good! You should save your work. Click the **Save Analysis** button. 
46.	**End of Procedure.**

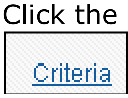
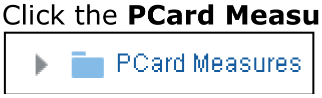
Results Tab - Another Bit of SQL Coding

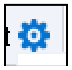
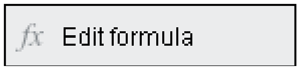
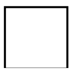
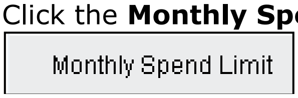
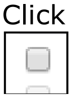
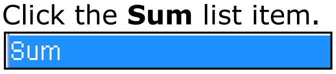
Procedure

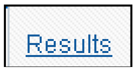
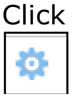
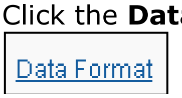
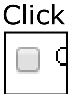
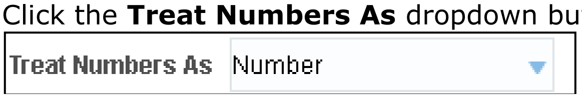
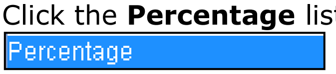
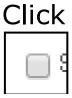
The Pivot Table looks pretty good, and the Percent column you added gives your manager a way to evaluate some card data.

There is, however, another way to add a percent column to provide even *more* value.



Step	Action
1.	You can add another data column, and edit the column formula to create a column that shows the percent of the monthly spending limit that was actually spent. Click the **Criteria** tab. 
2.	It's easiest to start with one of the data columns you'll use to create the formula. Essentially, you'll divide the amount spent by the amount allowed to be spent. Click the **PCard Measures** dropdown button to activate the menu. 

Step	Action
3.	Double-click the **Account Line Amount** list item. 
4.	Scroll to the right in the Selected Columns pane to locate the newly-added **Account Line Amount** data column. Click the **Options** button. 
5.	Click the **Edit formula** list item. 
6.	Click anywhere in the Column Formula box to remove the highlight from the information already present in the box. Click the **Column Formula** whitespace. 
7.	Click the screen to place the cursor immediately to the right of the existing text. Enter "**/**" in the **Column Formula** field.
8.	The other column that makes up the formula already exists in the analysis. Click the **Column** button. 
9.	Click the **Monthly Spend Limit** list item. 
10.	Now you can rename the data column. Click the **Custom Headings** checkbox. 
11.	Delete the existing Column Heading. Enter "**Pct of Spend Limit**" in the **Column Heading** field.
12.	You'll also have to change the aggravation rule. Click the **Aggregation Rule** dropdown button to activate the menu. 
13.	Click the **Sum** list item. 

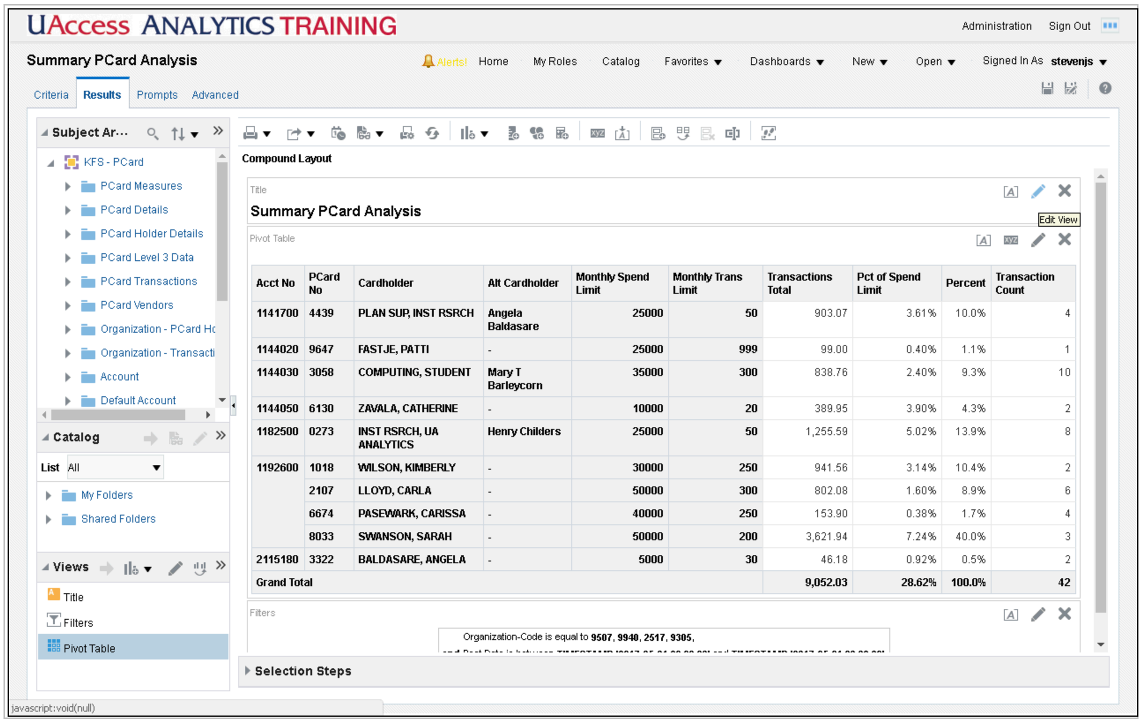
Step	Action
14.	The formula is done. Click the **OK** button. 
15.	Click the **Results** tab. 
16.	The new data column is in the wrong place, but you can move it. Select the Pivot Table in the Views pane in the lower left corner of the screen. Click the **Pivot Table** list item. 
17.	Click the **Edit View** button. 
18.	The new data column is in the Rows area. Where should it be? Click the **Pct of Spend Limit** column and drag it to the desired location.
19.	There are just a couple of additional modifications you should make to your new **Pct of Spend Limit** data column. Click the **More Options** button. 
20.	Click the **Column Properties** list item. 
21.	Click the **Data Format** tab. 
22.	Click the **Override Default Data Format** checkbox. 
23.	Change the type of data. Click the **Treat Numbers As** dropdown button to activate the menu. 
24.	Click the **Percentage** list item. 
25.	Click the **Scale for % (x 100)** checkbox. 

Step	Action
26.	Click the **OK** button. 
27.	There's your new Pct of Spend Limit data column. As the name of the column implies, it will show your manager what percentage of the Monthly Spend Limit was actually spent the previous month. Click the **Done** button. 
28.	This is a really useful report! **End of Procedure.**

Results Tab - Finishing Up

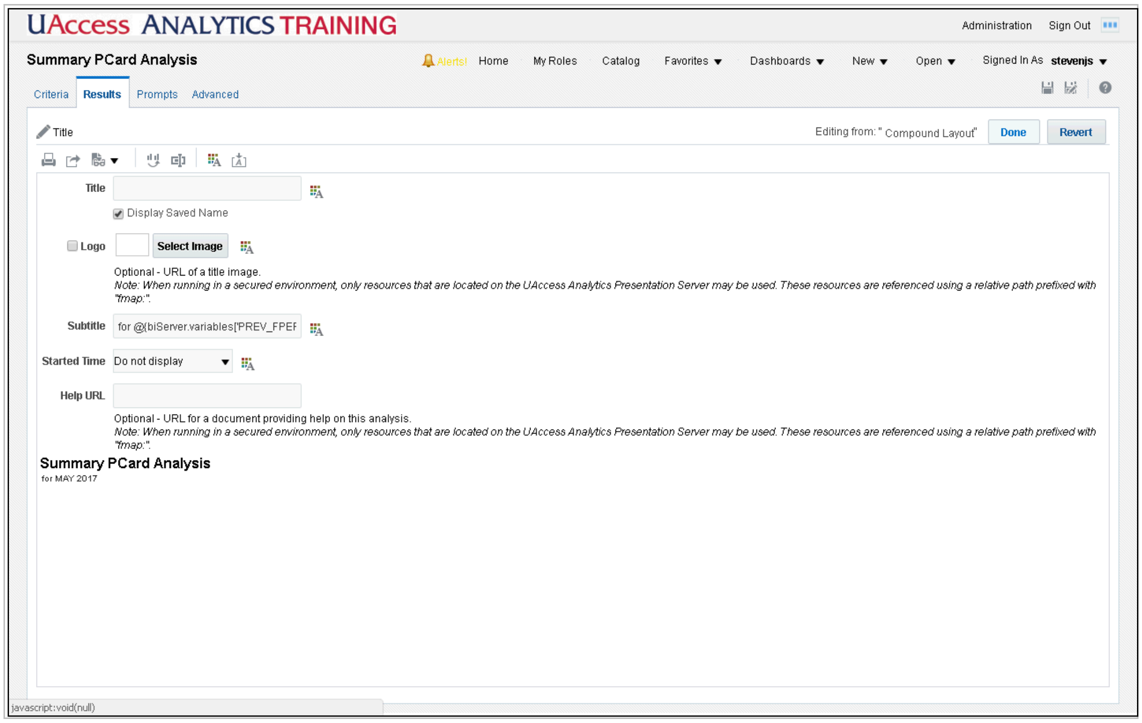
Procedure

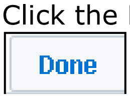
You're almost done! There's just one more small, but important, modification to make to this analysis.



Step	Action
1.	You will be editing the **Title** view. Click the **Edit View** button. 
2.	Enter "**for @{biServer.variables['PREV_FPERIOD_NAME']}**" in the **Subtitle** field.
3.	Press **[Tab]**.
4.	You can now see the month and year immediately below the title. The font is a bit big, however. Click the **Subtitle Format** button. 
5.	The default font size is **12**, even though that number isn't displayed in the field. Enter "**10**" in the **Size** field.

Step	Action
6.	Click the **OK** button. 



Step	Action
7.	That's it! Now you and your manager can tell which month the report is showing you without having to decipher the Filters view. Click the **Done** button. 
8.	Save your analysis one last time. Click the **Save Analysis** button. 
9.	**End of Procedure.**

Exercise 2 - Adding a Pivot Table to the Student Census Analysis

Exercise 2 - Scenario and Outline

Exercise 2 - Adding a Pivot Table to the Student Census Analysis

Modify the Student Census Analysis, adding a pivot table view.

Scenario: *Your boss likes the Student Census Analysis you created for her earlier. She thinks, however, that there may be a better way to see the data in a more concise manner. After a bit of thinking, you realize that a pivot table might be the answer!*

In this exercise, you will:

- Add a Pivot Table View
- Edit the Pivot Table View
    - Move columns
    - Duplicate columns
    - Hide columns
    - Add Grand Totals and Subtotals
- Move the Pivot Table View into place
- Delete the Table View.

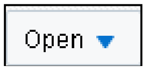
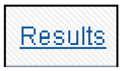
All of the steps have been laid out for you on the following pages, along with a few screen shots.

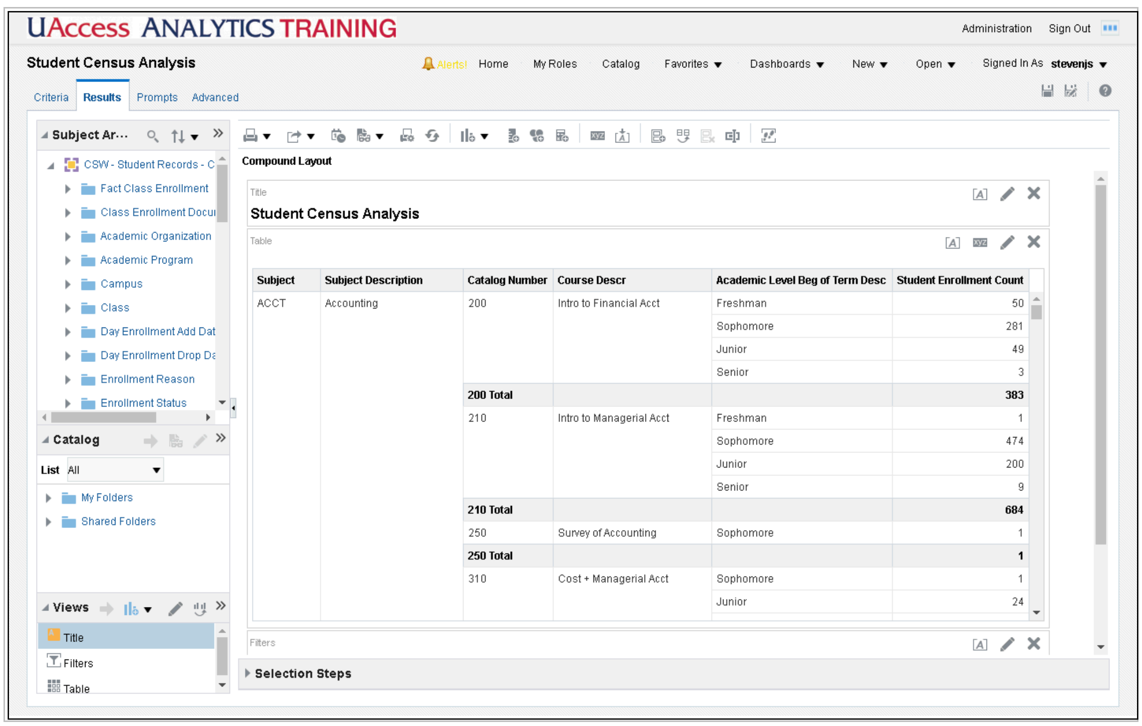
Just a few things as you begin:

- This is not a test.
- You will have adequate time to complete this exercise.
- Feel free to ask questions of the instructor or your neighbor.
- Feel free to work with your neighbor.
- If the instructions in the book are not clear to you, please ask for clarification.
- If you would like to take a short break during the exercise, please do so.

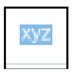
Exercise 2 - Results Tab - Pivot Table

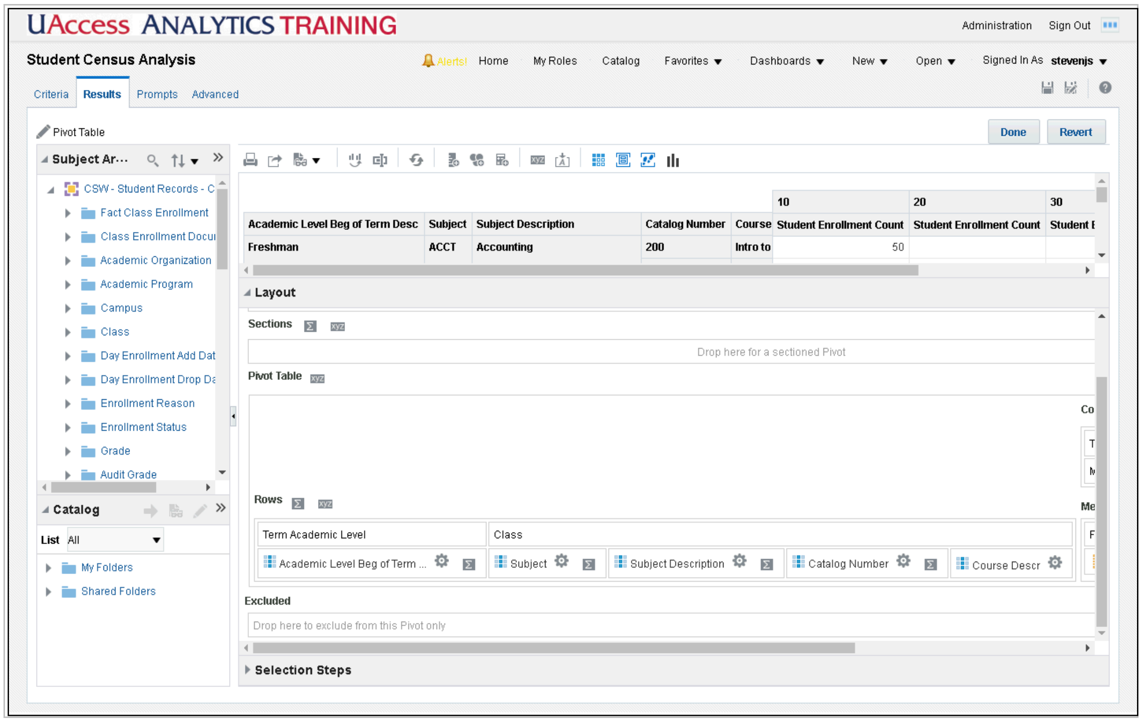
Procedure

Step	Action
1.	Click the **Open** button. 
2.	Click the **Student Census Analysis** list item. 
3.	Click the **Results** tab. 

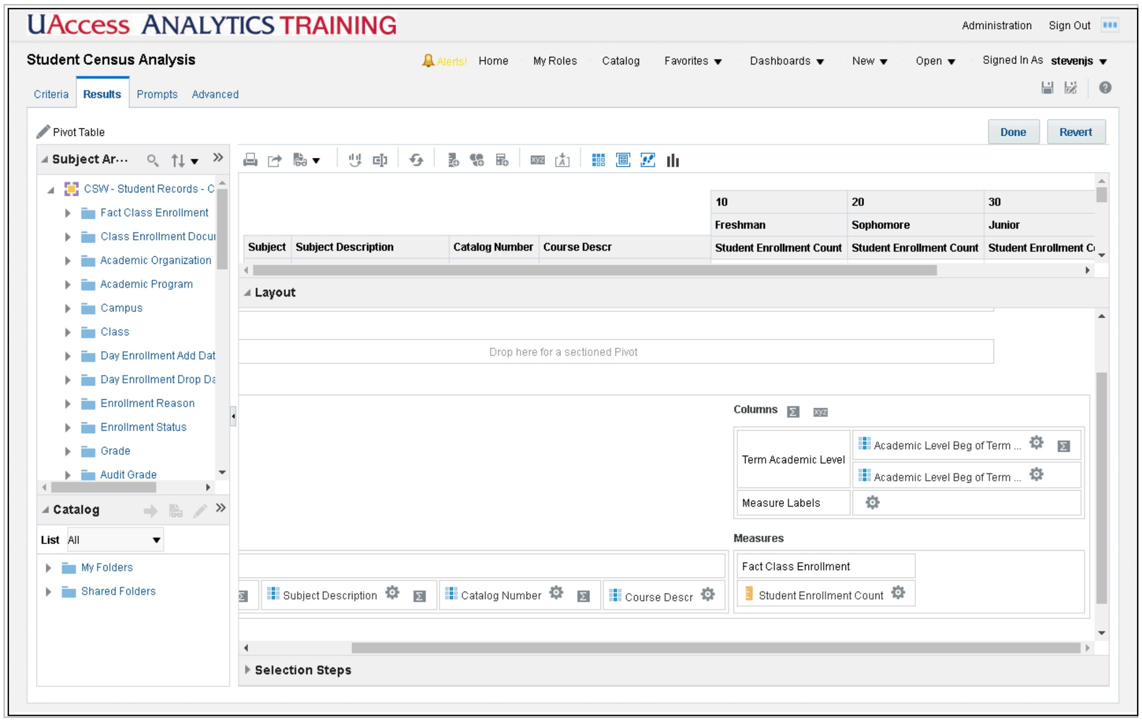


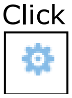
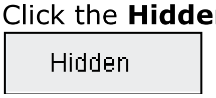
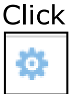
Step	Action
4.	Add a pivot table using the New View button in the Views pane. Click the **New View** button. 
5.	Click the **Pivot Table** list item. 

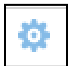
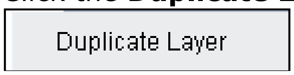
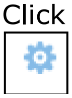
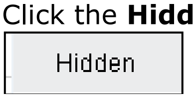
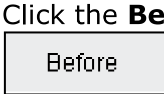
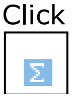
Step	Action
6.	All of the data columns that were present in the table are present here, too. They may not be in the right places, but they're here. It's up to you to move the data columns to the correct position and to make other edits as needed. *Note: To make things easier for yourself, you must realize and understand that changes made in the Layout pane are immediately reflected in the Preview pane above. The order and position of the data columns is the same in both panes.*
7.	The pivot table is too narrow. Note that it has a horizontal scroll bar across part of the bottom of the analysis. You can make the pivot table wider, if you wish. Or you can make it into a paginzted pivot table. Click the **Pivot Table View Properties** button. 
8.	If you wish to keep the scrolling function in the pivot table, adjust the width of the pivot table. Alternatively, you might instead choose the **Content paging** radio button. Enter "**1200**" in the field.
9.	Click the **OK** button. 

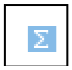
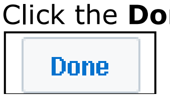


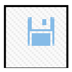
Step	Action
10.	Referring to the image of the completed pivot table on one of the previous pages, you can see that the **Academic Level Beg of Term** data columns belong in the Columns area. One of those data columns is present in the left-most position of the Rows area. Move that data column. Did you move the Code or Description version of the column? When you drop that data column into the Columns area, should it be placed above or below the existing Academic Level Beg of Term data column? Why? How can you tell which position it's in?



Step	Action
11.	Because you only have one data column in the Measures box, you don't need to have or keep the Measure Labels in place. You can move the Measure Labels item to the Excluded area. Click the **Measure Labels** column header and drag it to the desired location.
12.	You should hide the **Academic Level Beg of Term Code** data column. Click the **More Options** button. 
13.	Click the **Hidden** list item. 
14.	Now make duplicates of the **Subject** and **Subject Description** data column. Click the **More Options** button. 
15.	Click the **Duplicate Layer** list item. 

Step	Action
16.	Follow the same procedure for the **Subject Description** columnn. Continue with the exercise. Click the **More Options** button. 
17.	Click the **Duplicate Layer** list item. 
18.	The two duplicate data columns dropped into the right end of the Rows area of the screen. One-by-one, you can grab the duplicates and drag them into the Pivot Table Prompts area. Make sure the Subject data column goes to the *left* of the Subject Description data column. Click the **Subject** column and drag it to the desired location.
19.	Once you have both duplicated columns in the Pivot Table Prompts area, you can hide the Subject data column. Click the **More Options** button. 
20.	Click the **Hidden** list item. 
21.	**Question:** Why bother putting the Subject data column into the Pivot Table Prompts area of the screen if you're just going to hide it? What is the purpose of that data column in that position?
22.	You can also add a type of sum to the Pivot Table Prompts area. Click the **Totals** button. 
23.	Click the **Before** list item. 
24.	Add a Grand Total to the Rows area. Click the **Totals** button. 

Step	Action
25.	Click the **After** list item. 
26.	Add a subtotal to the Subject data column in the Rows area. Click the **Totals** button. 
27.	Click the **After** list item. 
28.	Add a Grand Total column to the Columns area. Click the **Totals** button. 
29.	Click the **After** list item. 
30.	You can get a better look at the results of your work by collapsing the Layout pane. Click the **Layout Pane** dropdown triangle. 
31.	That looks pretty good. You have all of the data columns arranged properly, and have all of the totals and subtotals in place. Click the **Done** button. 
32.	The Pivot Table is not yet in place in the Compound Layout pane. You have to add it to the screen yourself. It lives in the **Views** pane. Click the **Pivot Table** list item and drag it to the desired location.
33.	You can put it between the Title and Table views. Watch for the dark blue line to determine when to release the view. Release the mouse button.
34.	The pivot table is now in place. You no longer need the Table view. You can delete it from the **Views** pane. Click the **Table** list item. 

Step	Action
35.	Click the **Show More Buttons** button. 
36.	Click the **Remove View from Analysis** list item. 
37.	You really should save the analysis at this point. Click the **Save Analysis** button. 
38.	**Congratulations! You've completed the second exercise!** **End of Procedure.**

Dashboard Prompts

About Dashboard Prompts

About Dashboard Prompts

What are Dashboard Prompts?

A dashboard prompt is a type of dynamic filter that can be applied to some or all of the analyses on a given dashboard page or set of pages. Dashboard prompts allow the end user to specify the data values that are used to filter the associated reports.

Why Use Dashboard Prompts?

Dashboard prompts are interactive and are displayed on a dashboard page so that the user can prompt for (filter to) specific values in a report or set of reports. The selected values are set when the user clicks Apply.

Many of the dashboard prompts found on the University-level dashboards - **Financials > General - Financial Management** or **Student > Student Enrollment**, for example - have fields that are prepopulated when a user accesses the dashboard page. Very often, prompts are set to look at the current term or fiscal period, or at the logged-in user's department. Those prepopulated values can be changed on-the-fly, and applied to the page.

Prompts Used in This Workshop

The dashboard prompt used in this workshop has already been created for you. It was one of the files you copied into your personal folders at the beginning of the workshop.

More Information

For more information about dashboard prompts, you can search the online **Analytics Help** documention. Search for "dashboard prompt."

To see specific instructions to create the prompt we're using in the workshop, turn to **Appendix D: Creating the Dashboard Prompt**.

You might also wish to download the **Working with Dashboards: Shared Reports at a Glance** document from the UAccess Community.

Edit the Student Census Analysis to Function with the Prompt

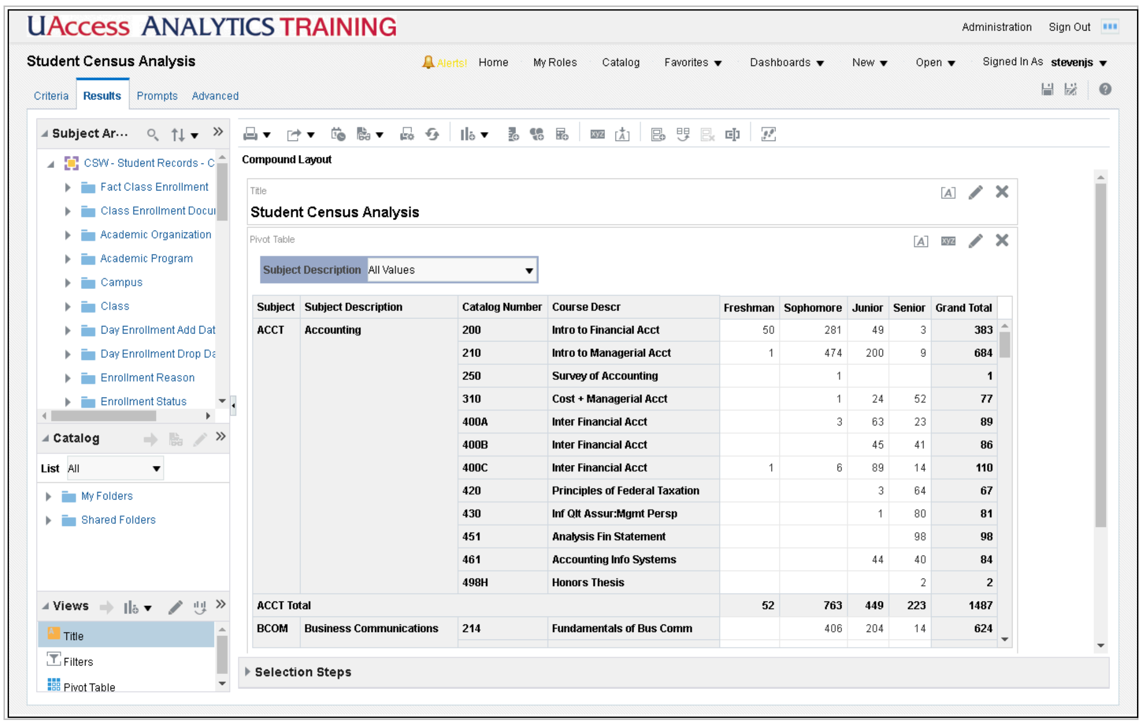
Procedure

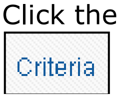
You have created and modified the Student Census Analysis, and you're nearly ready to add the analysis to a dashboard page.

To make it more functional for yourself or your users, you would typically create a dashboard prompt to go with it. That prompt has already been created for you. You copied it to your folders earlier in the workshop.

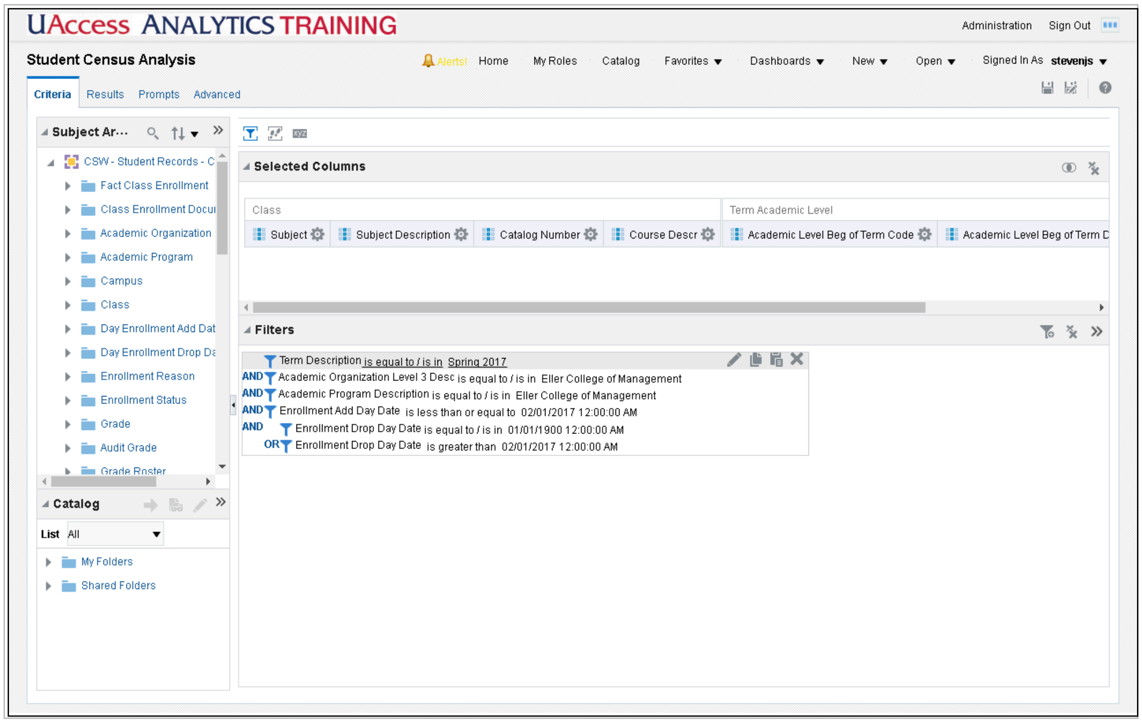
For a detailed explanation of how that prompt was created, please see **Appendix D: Creating the Dashboard Prompt**.

You must modify the **Student Census Analysis** so that the prompt and the analysis will work together when you put them both on a dashboard page.

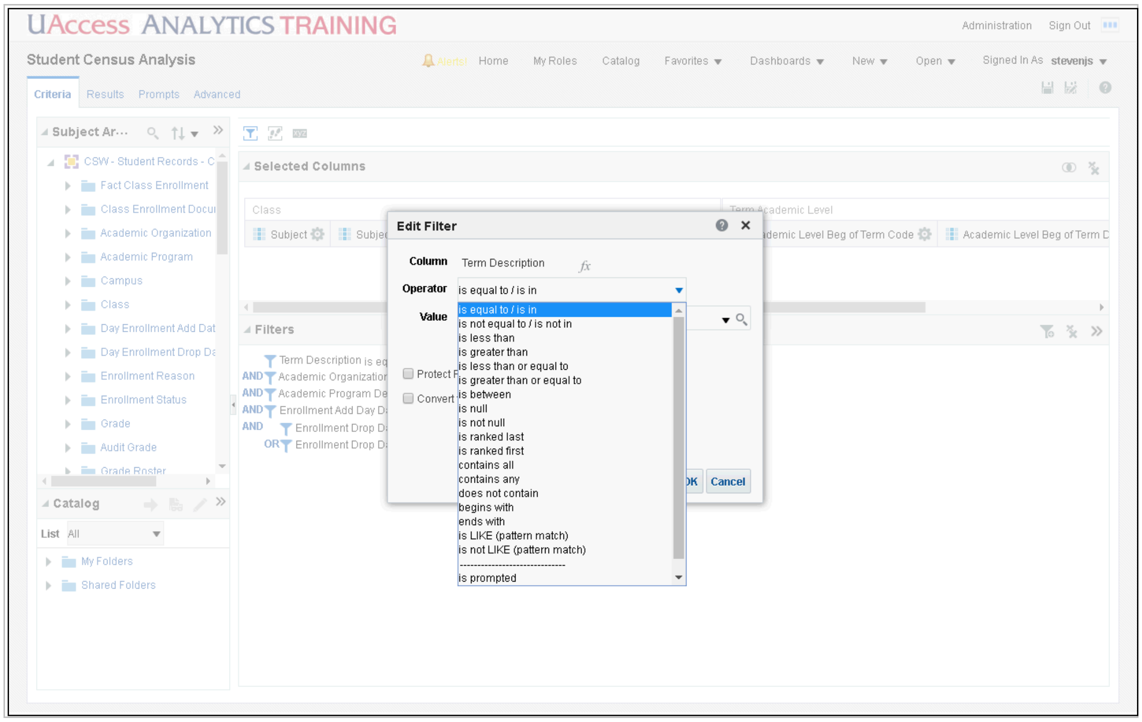


Step	Action
1.	The modifications must be made to the filters, which are on the Criteria tab. Click the **Criteria** tab. 

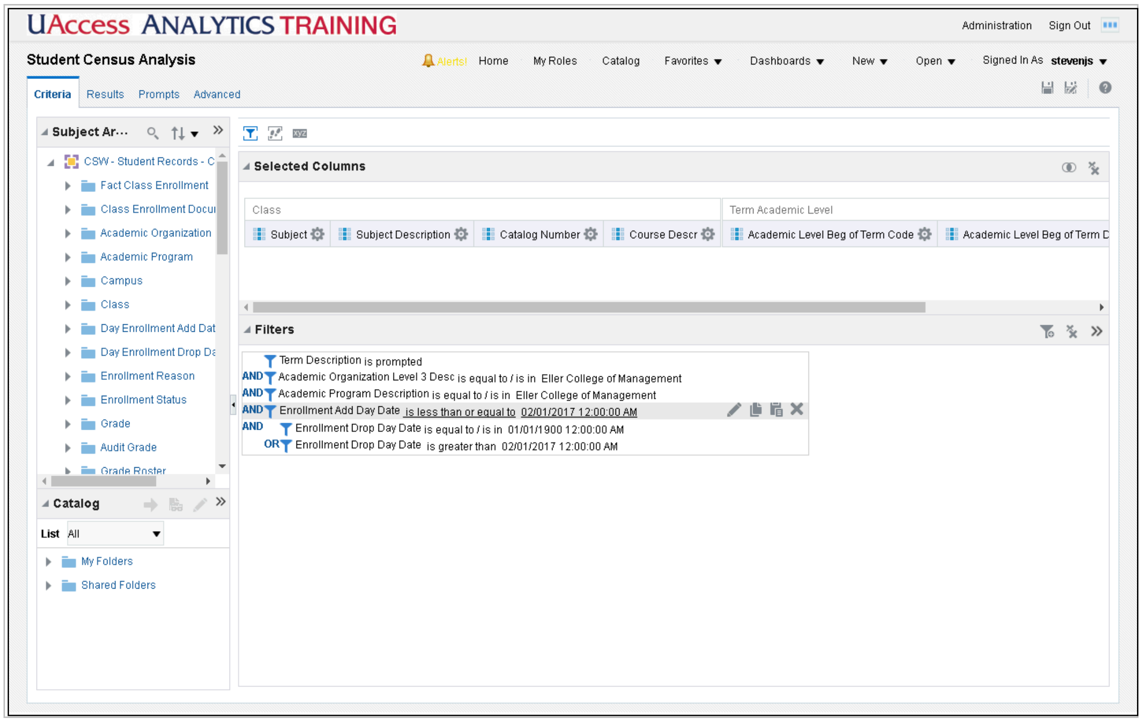
Step	Action
2.	Hover your mouse over the **Term Description** filter.

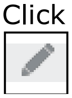
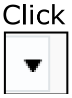


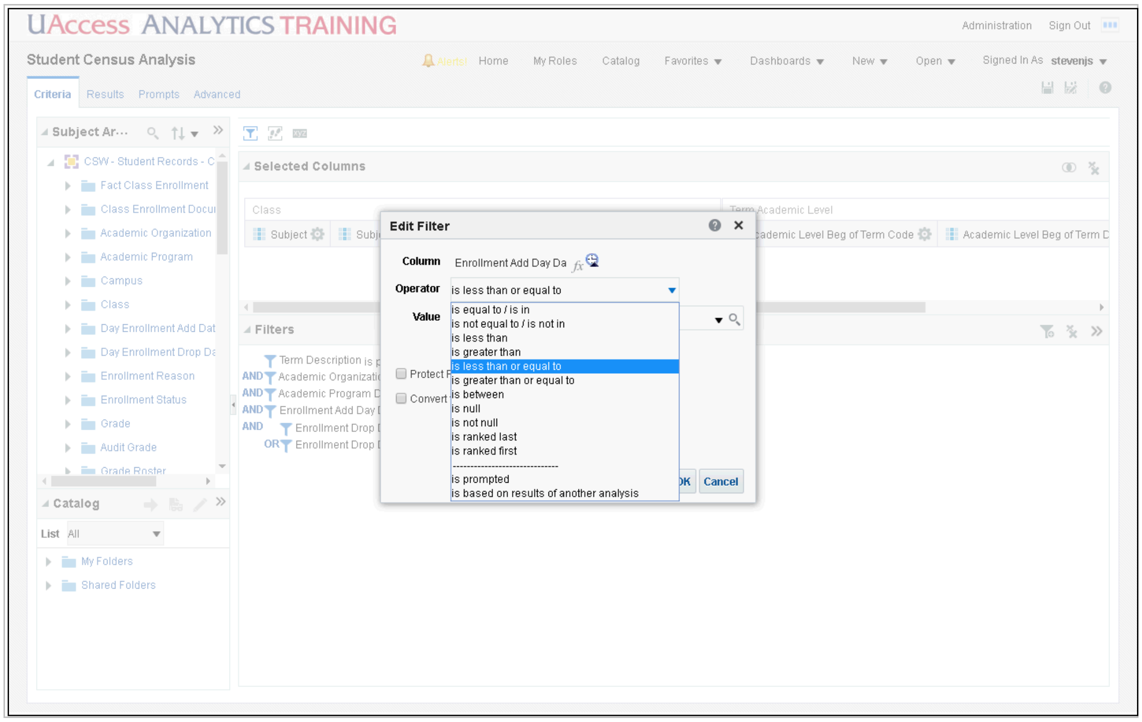
Step	Action
3.	Click the **Edit Filter** button. 
4.	Click the button to the right of the **Operator** field. 



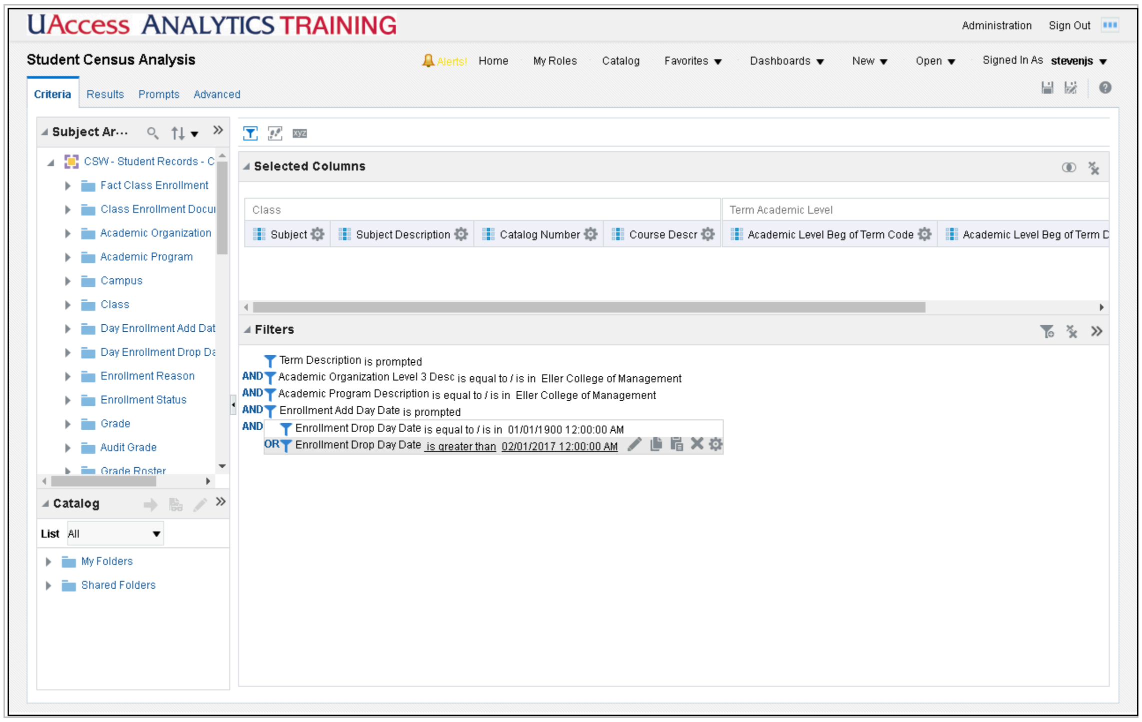
Step	Action
5.	The *is prompted* operator is what makes the filter take the data from the prompt when the analysis and prompt are together on a dashboard. Click the **is prompted** list item. 
6.	Click the **OK** button. 
7.	Hover your mouse pointer over the **Enrollment Add Day Date** filter.

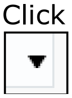


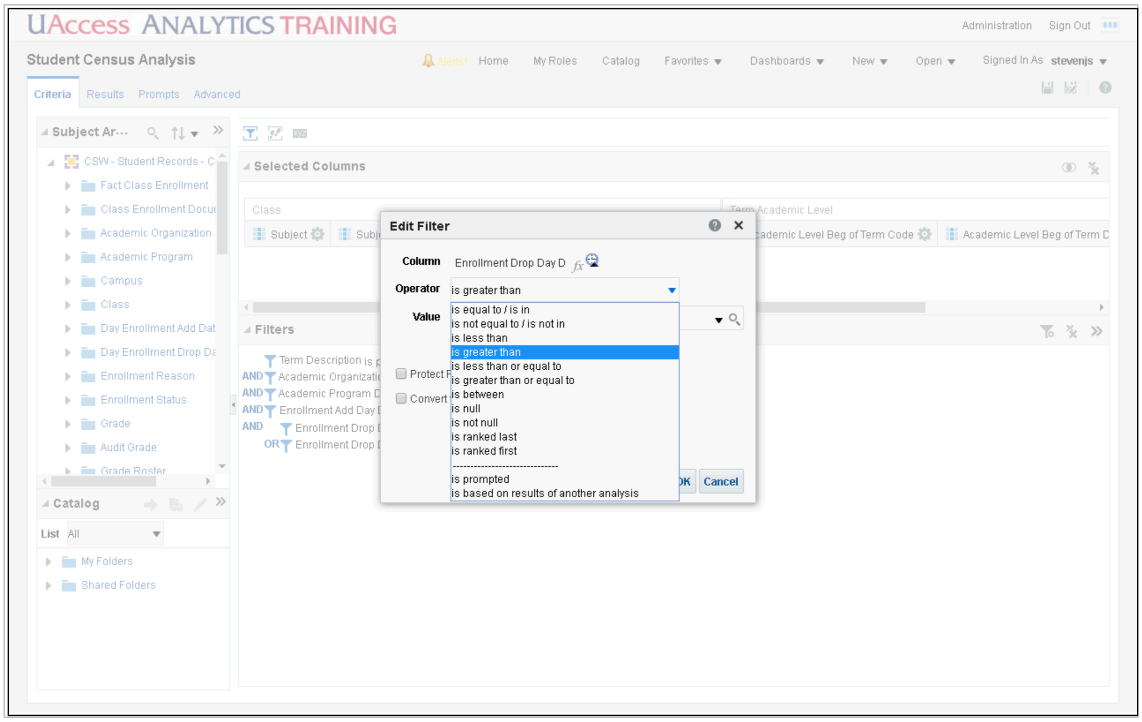
Step	Action
8.	Click the **Edit Filter** button. 
9.	Click the button to the right of the **Operator** field. 

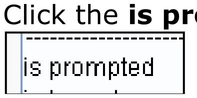


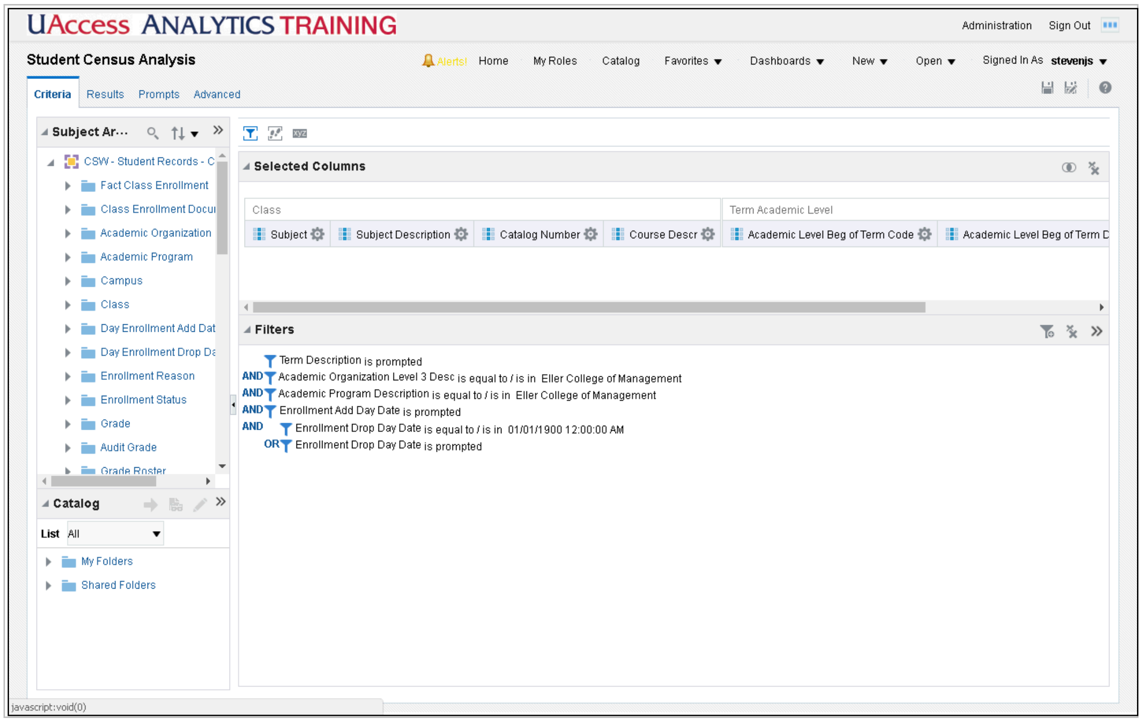
Step	Action
10.	Click the **is prompted** list item. 
11.	Click the **OK** button. 
12.	The dashboard prompt includes a field for Enrollment Drop Date, and the filter has two instances of that particular column. When you have that situation, the prompt will affect *all* instances of that filter, even if the operator of one of the filters is not changed to ***is prompted.*** You must take some action to protect the filter you don't want affected.
13.	Hover your mouse pointer over the second instance of the Enrollment Drop Day Date filter.



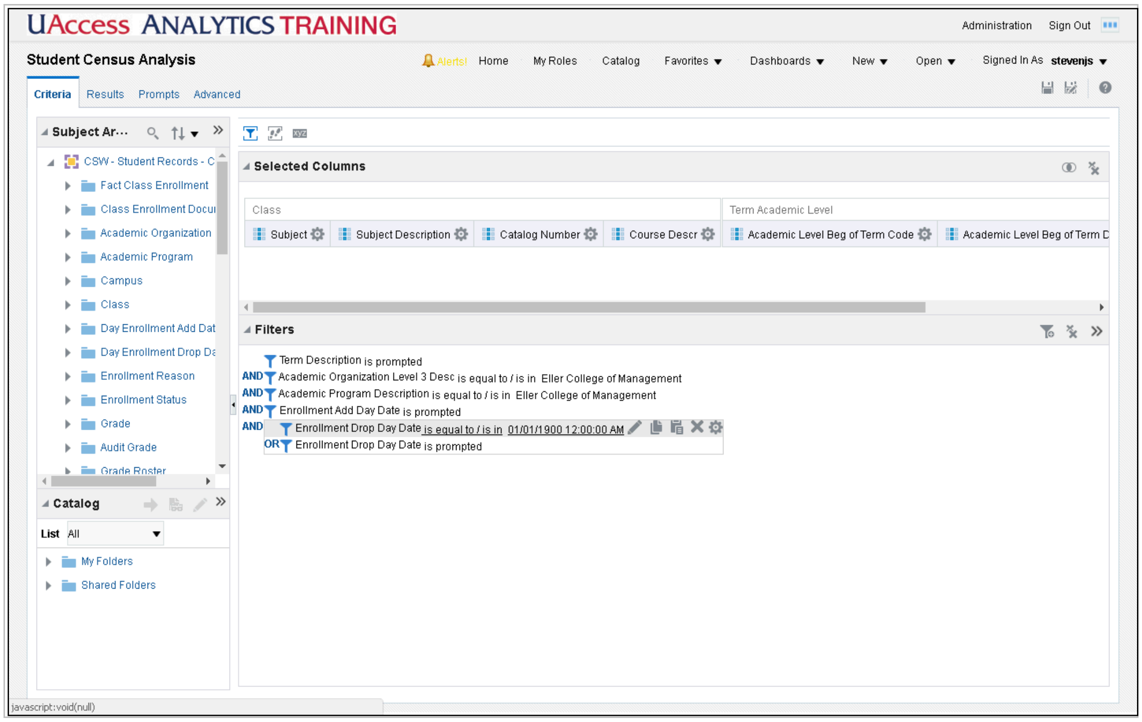
Step	Action
14.	Click the **Edit Filter** button. 
15.	Click the button to the right of the **Operator** field. 

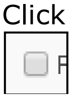


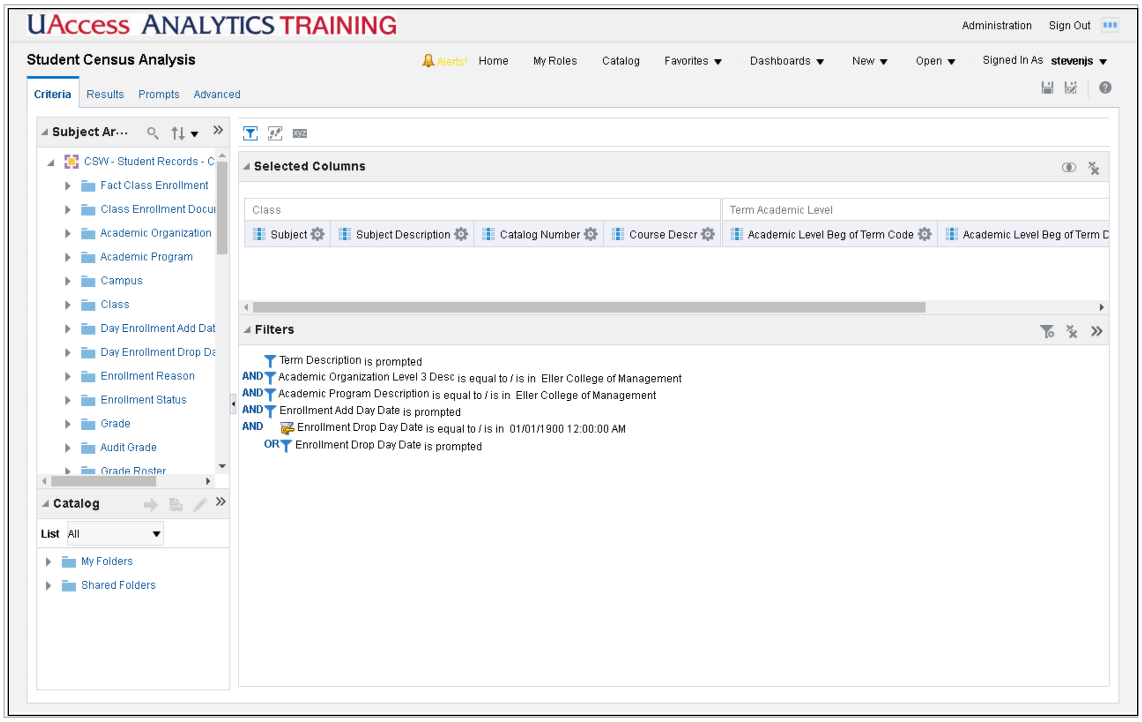
Step	Action
16.	Click the **is prompted** list item. 
17.	Click the **OK** button. 



Step	Action
18.	You have one more date-related filter available. In this instance, you need to keep this filter from being changed by the prompt. This filter retains those students who have not dropped the classes you're interested in. You need to make sure the filter will not change.



Step	Action
19.	Click the **Edit Filter** button. 
20.	Click the **Protect Filter** checkbox. 
21.	Click the **OK** button. 



Step	Action
22.	The filters in the analysis are now set to work properly with the dashboard prompt. Note the little golden key on the protected filter! The builder of this report is the only person who has the key, so the prompt is unable to change or affect this filter.
23.	Click the **Save Analysis** button. 
24.	**End of Procedure.**

Creating a Dashboard Page

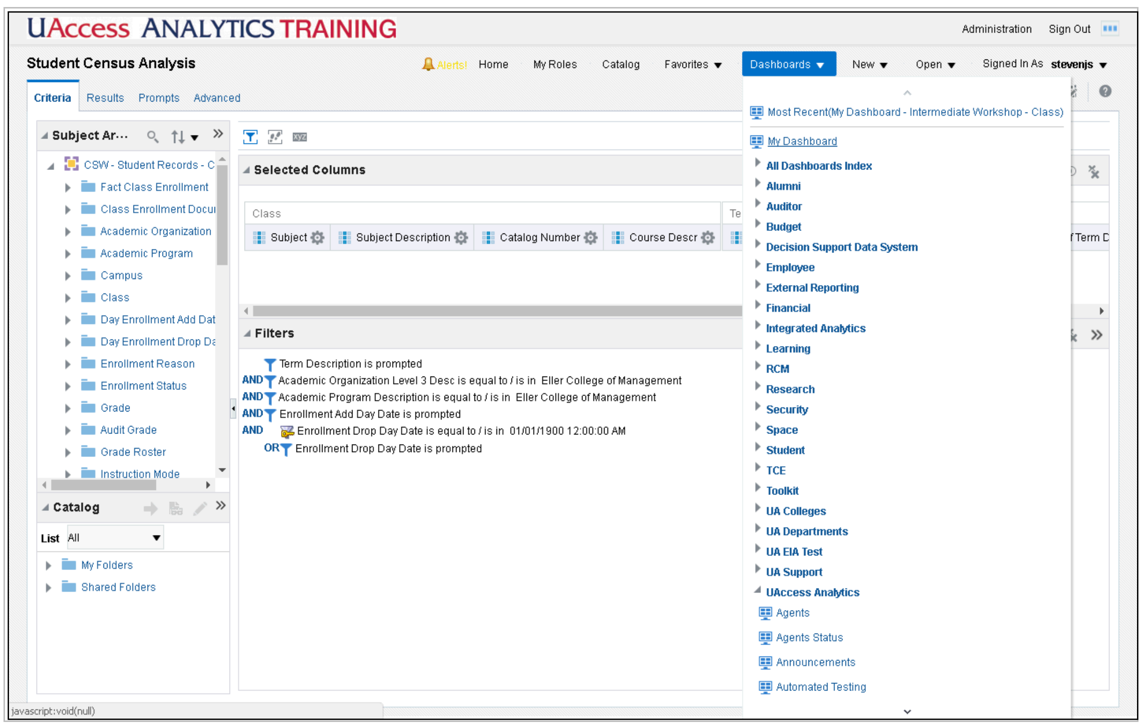
Creating a Dashboard Page

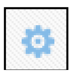
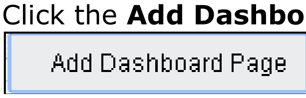
Procedure

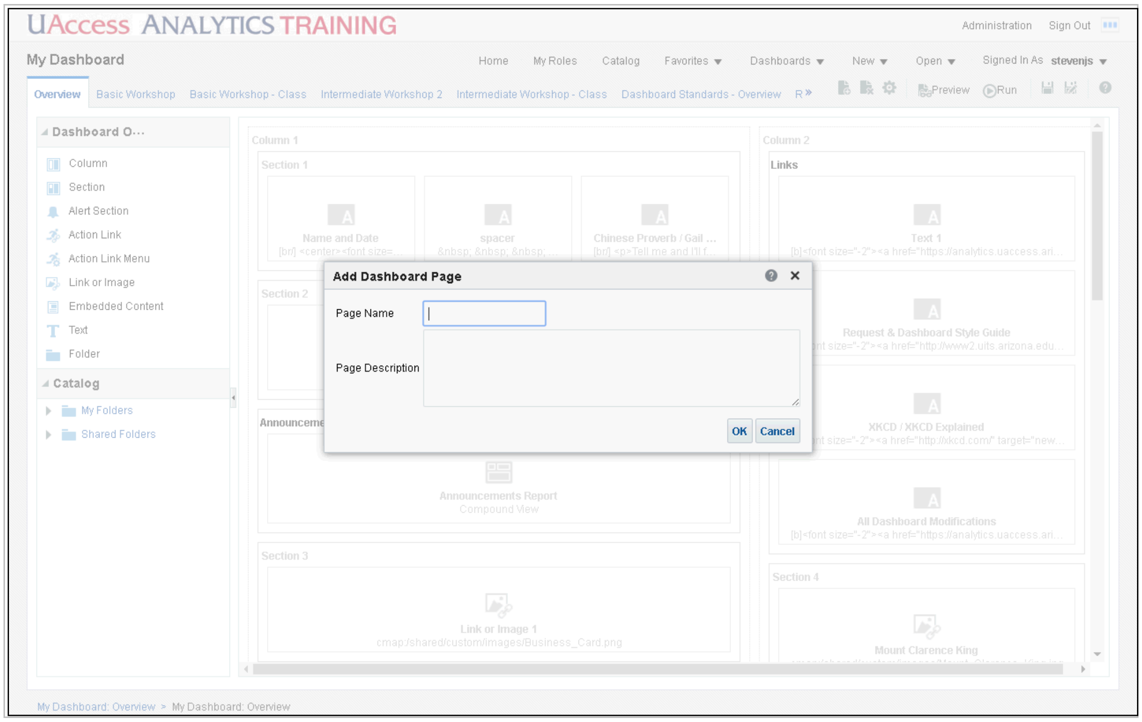
You've created the Student Census Analysis and you have a copy of the associated dashboard prompt. You've also modified the filter on the analysis to correctly work with the prompt.

It's time to put them together on a dashboard page.

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



Step	Action
2.	In this workshop, you will use your personal dashboard to hold the analysis and prompt. In real life, you might very well be putting the items on a shared department or college dashboard. If you were putting those items on a shared dashboard page,, you would have saved the items into an appropriate shared folder. Given that stipulation, the general process is the same. Click the **My Dashboard** list item. 
3.	In real life, you may have already created a dashboard that you wish to keep as-is. You'll most likely want to add another page. Click the **Page Options** button. 
4.	Click the **Edit Dashboard** list item. 
5.	Click the **Add Dashboard Page** button. 
6.	Click the **Add Dashboard Page** list item. 

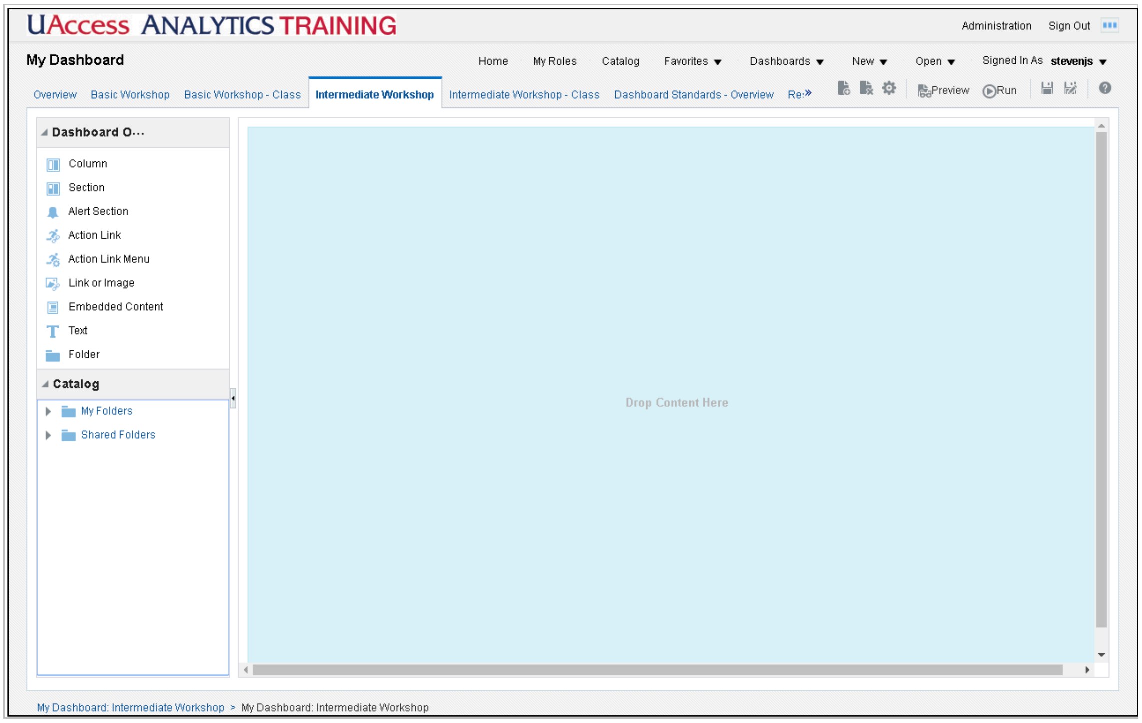


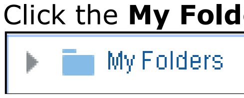
Step	Action
7.	Enter "**Intermediate Workshop**" in the **Page Name** field.
8.	You could also add a page description if you'd like. It's not mandatory, but it can be helpful later on. Click the **OK** button. 
9.	**End of Procedure.**

Adding the Prompt and Analysis to the Dashboard Page

Procedure

You've created the new dashboard page. Now add the dashboard prompt and the Student Census Analysis.



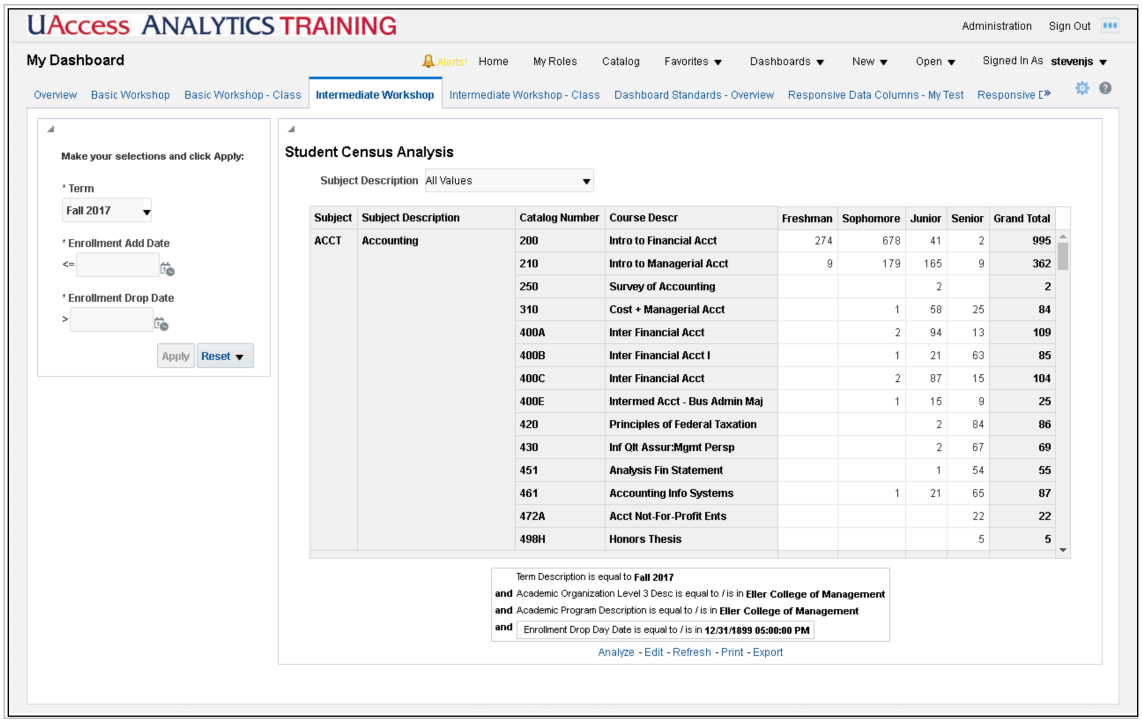
Step	Action
1.	Now you have a nice blank page from which to start. The first thing to do is to add a couple of columns from the Dashboard Objects pane. Drag and drop a Column into the large blue area. Drag and drop a second Column into the dashboard and place it to the side - either left or right - of the first column. Click the **Column** list item and drag it to the desired location.
2.	Now find the analysis and prompt you need. They're in the **My Folders** folder in the **Catalog** pane on the left side of the screen. Click the **My Folders** dropdown triangle. 

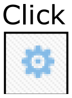
Step	Action
3.	Now open the Intermediate Workshop folder. Click the **Intermediate Workshop** dropdown triangle. 
4.	Click the **Student Census Prompt** list item and drag it to the desired location.
5.	Click the **Student Census Prompt** list item and drag it to the desired location.
6.	You can see that when you drop the prompt or any other item into a dashboard column, the system automatically encloses that item in a section. Now grab the report and put that in the right-hand section. Click the **Student Census Analysis** list item and drag it to the desired location.
7.	You now have two side-by-side columns on your dashboard, each of which contains and item you've either created or that had been created for you. Click the **Save Dashboard** button. 
8.	Click the **Run** button. 
9.	The page looks okay! **End of Procedure.**

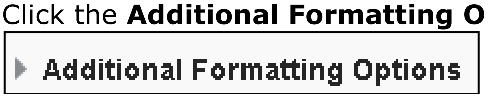
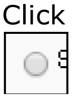
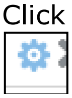
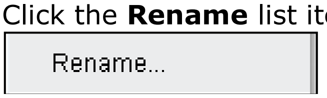
Editing the Dashboard Page

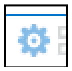
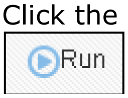
Procedure

You've created the basic dashboard page, and it looks fine. There are a couple of minor changes you could make to clean it up a bit.



Step	Action
1.	For example, those little arrow icons in the upper-left corner of each column aren't needed. If you were to click either one of them, you'd collapse the section you're looking at. That's not necessary in this case. You can also give the Prompt area a title or instructions. Click the **Page Options** button. 
2.	Click the **Edit Dashboard** list item. 
3.	Let's start with the sections. Hover your mouse over the section on the left. You'll see a small button bar appear. Click the **Properties** button. 

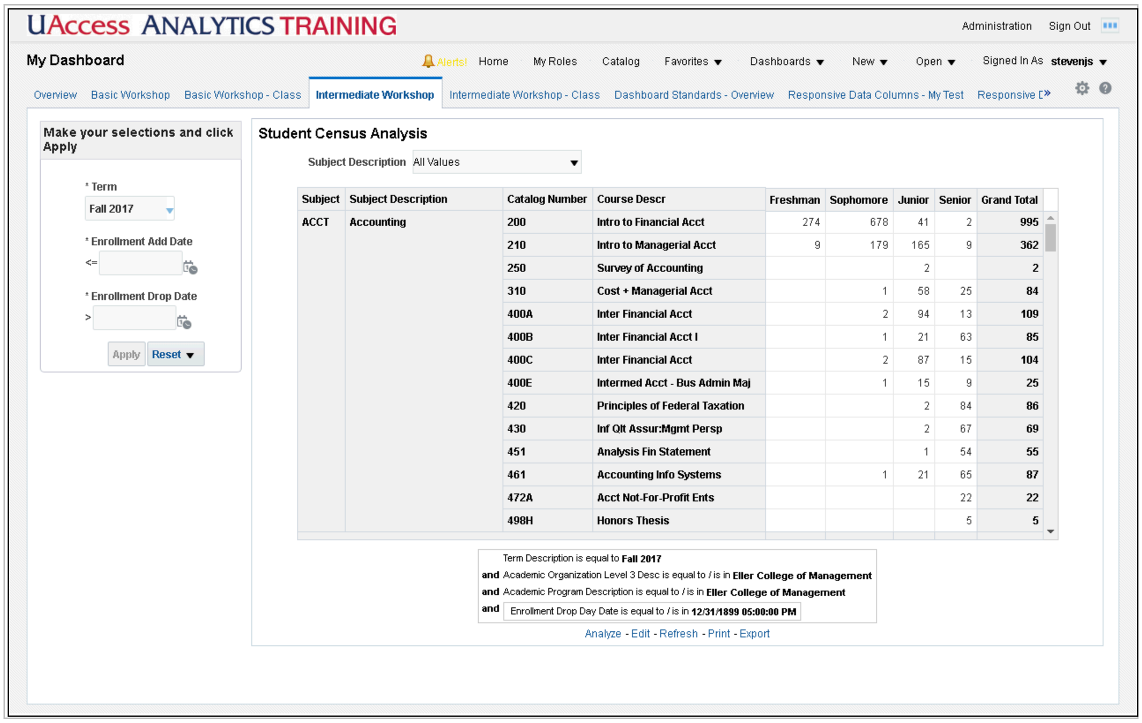
Step	Action
4.	Click the word **Collapsible** to remove that little triangle. Click the **Collapsible** list item. 
5.	Run through the same steps for the Section on the right. Click the **Properties** button. 
6.	Now format the columns. Start on the left. Click the **Properties** button. 
7.	Click the **Column Properties** list item. 
8.	Expand the screen. Click the **Additional Formatting Options** link. 
9.	Click the **Specific Size** option. 
10.	Enter "**20%**" in the **Width** field.
11.	Click the **OK** button. 
12.	Make a similar change to the other column, setting the width at 80%. Click the **Column Properties** button. 
13.	Now add a title to the Prompt section. Click the **Options** button. 
14.	Click the **Rename** list item. 

Step	Action
15.	Enter "**Make your selections and click Apply**" in the **Rename** field.
16.	Click the **OK** button. 
17.	Now turn on and display the new header. Click the **Options** button. 
18.	Click the **Show Section Header** list item. 
19.	Click the Properties button again, then... Click the **Show Section Title** list item. 
20.	Now save your dashboard. Click the **Save Dshabord** button. 
21.	Once you see the word "Saved", you can run the dashboard. Click the **Run** button. 
22.	**End of Procedure.**

Testing the Dashboard Page

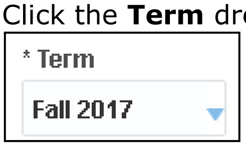
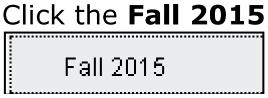
Procedure

The prompt and analysis are on the new dashboard page. Test them to see how they work.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>You can test the dashboard prompt to see how it works, and to make sure it's working with the analysis.

Note that the three prompt fields all have an asterisk (*) next to the prompt field names. Those asterisks indicate that each of the fields is a mandatory field. If you make a change to one field, you must make a change to all before you can click the Apply button.

Click the Term dropdown triangle.
</td></tr>
<tr><td>2.</td><td>Click the Fall 2015 list item.
</td></tr>
<tr><td>3.</td><td>Because you selected Fall 2015 in the Term prompt, you must enter a date relative to that term in the Enrollment Add Date prompt field.

Enter "09/01/2015" in the Enrollment Add Date field.</td></tr>
</table>

Step	Action
4.	Enter the same date in the **Enrollment Drop Date** field. Enter "**09/01/2015**" in the **Enrollment Drop Date** field.
5.	Now press the tab key on your keyboard or click out of the box to activate the **Apply** button. Press **[Tab]**.
6.	Click the **Apply** button. 
7.	Note that the numbers in the pivot table - the results - have changed. This analysis is now showing the count of Eller students taking classes at Eller on September 1, 2015. **End of Procedure.**

Analytics Agents

About Analytics Agents

About Analytics Agents

What are Agents?

Agents are dynamic scheduling and delivery tools that allow you to automate your reports, which can be delivered to you and other interested people on a schedule or when a specific event or set of events occurs.

Agents use Devices and Delivery Profiles to help them run. A Device sets the method by which your reports will be delivered. A Delivery Profile tells Analytics to deliver the analysis to your device. Both of these items - Devices and Delivery Profiles - have already been set up and enabled for you in Analytics. There is no requirement that you create or manage these items. You simply choose whether or not to use this part of the agent toolset.

Why Use Agents?

- Meetings. Everyone has meetings to attend. Sometimes, when you attend a department meeting, for example, you're expected to present and discuss information about something. That something might be data that is shown in an Analytics report. If you occasionally forget to print out the report and take it to your meeting, you could create an agent that would deliver the report to you via email an hour before your meeting. Then you'd have time to peruse the information and would be able to deliver a well-thought-out presentation.
- Your boss. Everyone has a boss, too. If your boss requires specific information delivered at a specific time, and if that information is available in Analytics, why not create an agent that will deliver that information to your boss on a set schedule? Your boss will be impressed that you know how to do that, and she'll have the information she needs when she wants it.
- Stuff happens. Stuff happens to everyone. If you're able to devise a report that will show you that an event has occurred - the balance in one of your financial accounts has fallen below a specific amount, or the GPA for a student in your program drops below a certain value, or the paperwork for a new employee was approved, etc. - you can create an agent that will notify you about that occurrence.

More Information

For more information, feel free to look up "agents" in the online **Analytics Help** documentation. There are at least 18 entries from which to choose.

You might also wish to download the **Working with Agents: Delivering Data to Your Desktop** document from the UAccess Community.

If you are going to be creating agents that deliver data to other people - this is something that can be done! - you should also download the **UAIR Policy on Dynamic Agents.**

Creating an Agent

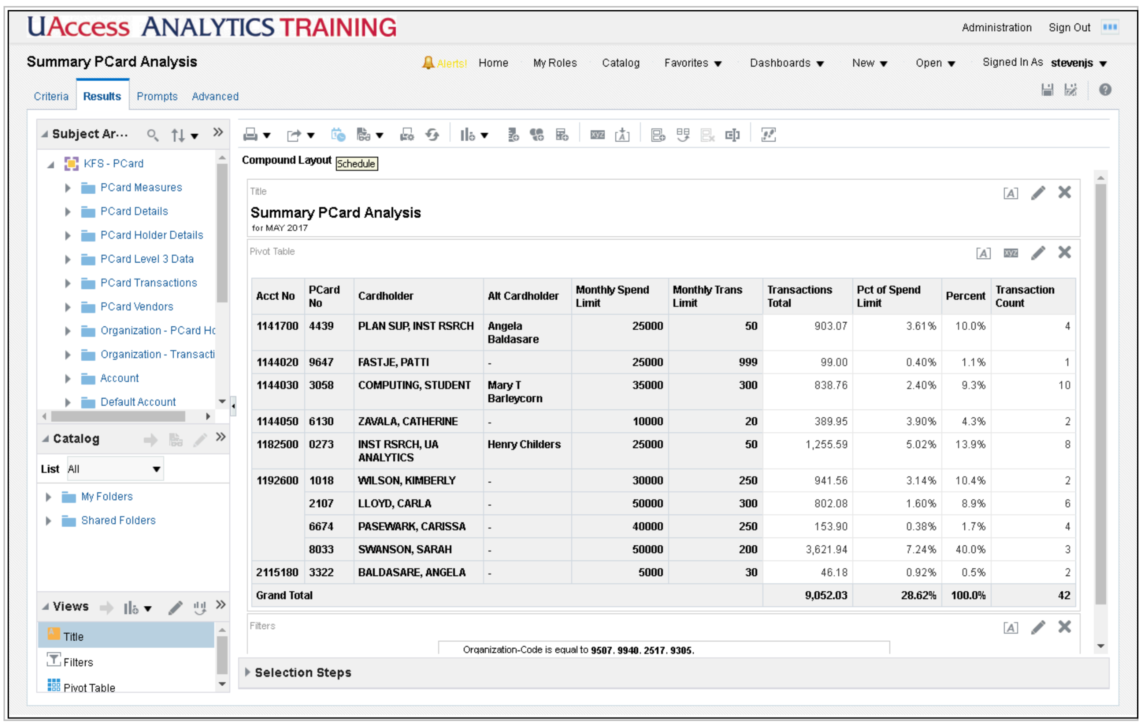
Creating an Agent to Deliver the Summary PCard Analysis

Procedure

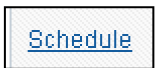
You have placed the Student Census Analysis and a dashboard prompt on a new dashboard page.

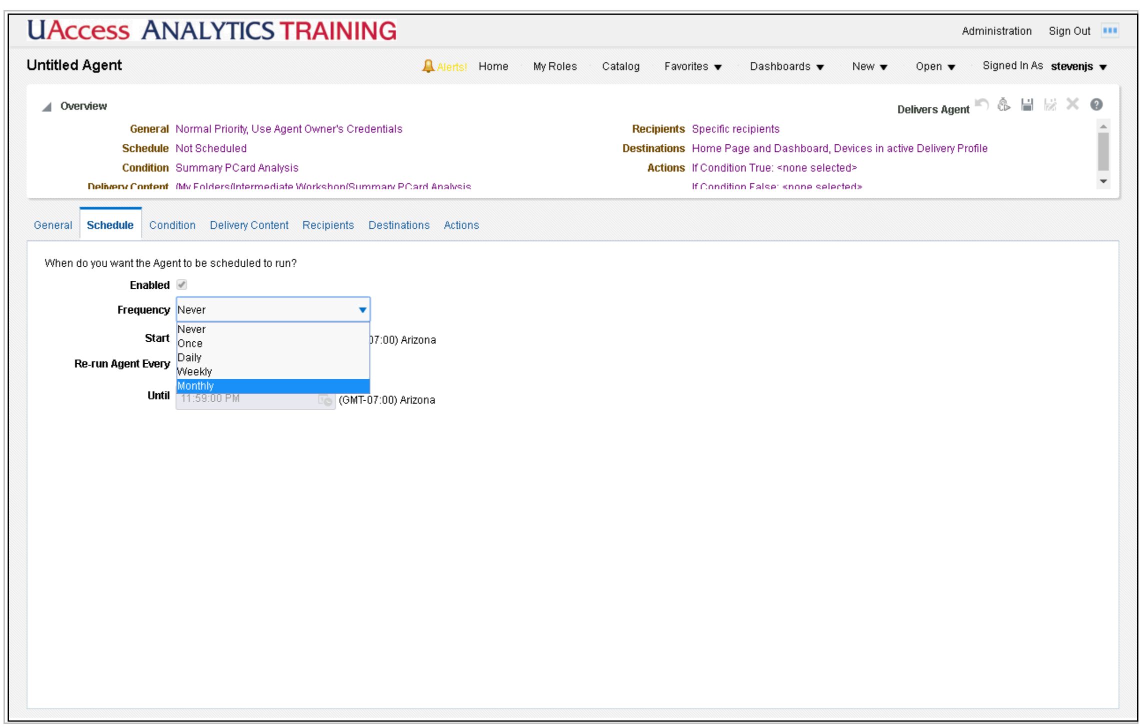
Remember, however, that you've also created a Summary PCard Analysis, which you will presumably want to use in some fashion. Why not have that analysis delivered to you via email each month?

You can create an agent to make that happen!

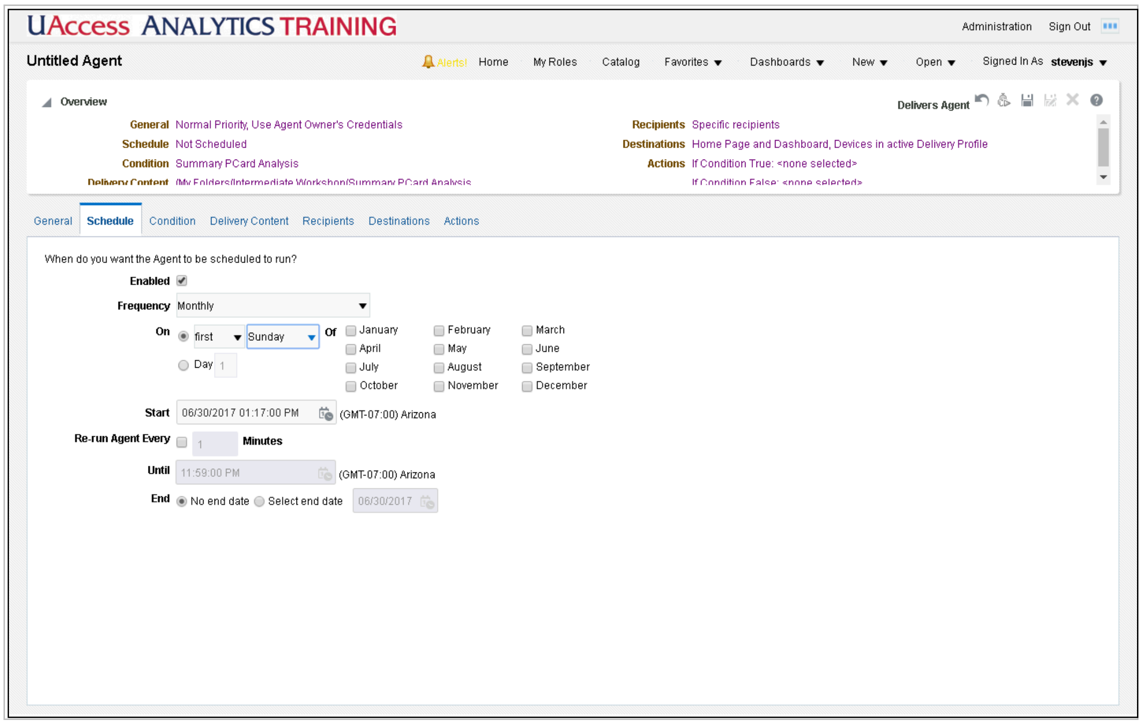


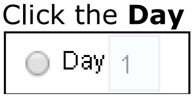
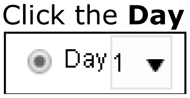
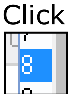
Step	Action
1.	The easiest method of creating an agent is to start with the report you wish to be delivered on your screen. Make sure you're looking at the Results tab. Click the **Schedule** button. 

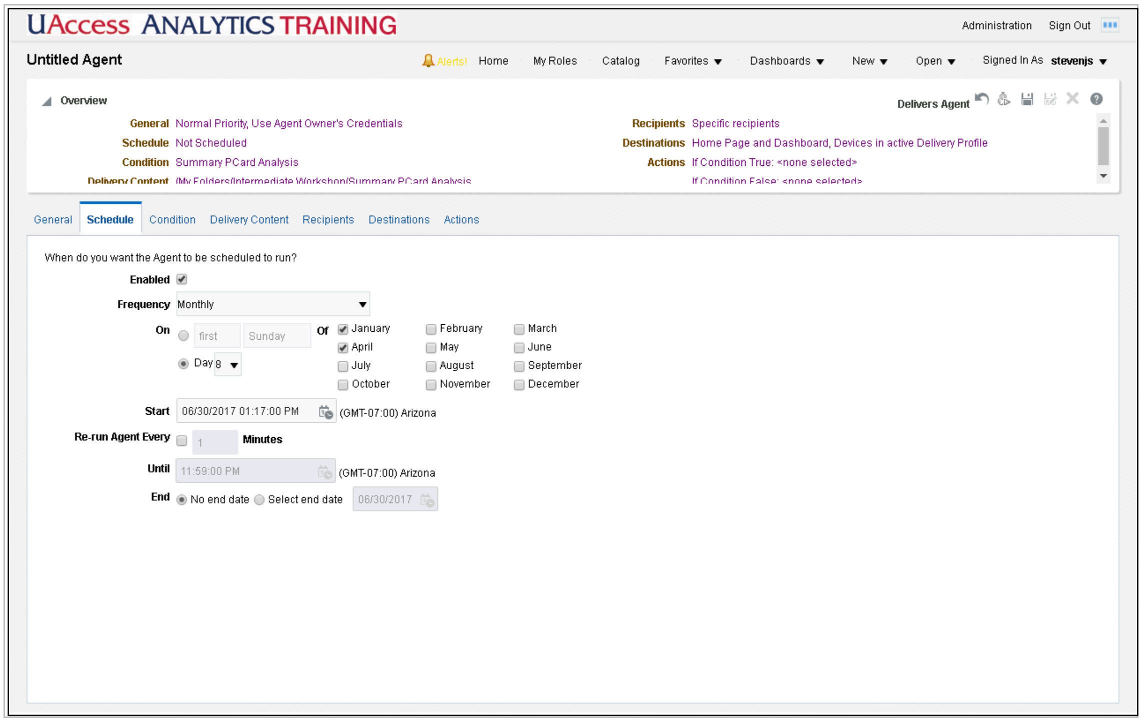
Step	Action
2.	You're now looking at the seven tabs that make up the agent screen. In the upper left corner, you can see that this is an **Untitled Agent**. You haven't saved it yet. Across the top of the screen is an **Overview** section. It shows a brief synopsis of the contents of the seven tabs immediately below the section. On the **General** tab, you can see the default settings of **Normal Priority** and that the agent will **Use Agent Owner's Credentials** to run the report.
3.	Click the **Schedule** tab. 
4.	Setting up the schedule is very similar to the method for adding an appointment to your online calendar. The agent is Enabled by default. How often should this agent run? What's the frequency? Click the **Frequency** dropdown triangle. 

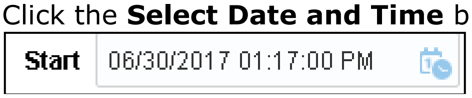
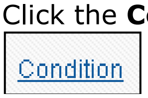


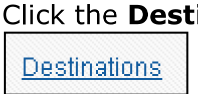
Step	Action
5.	Since the analysis was designed to show data for the previous month, that would suggest the report should be delivered monthly. Click the **Monthly** list item. 

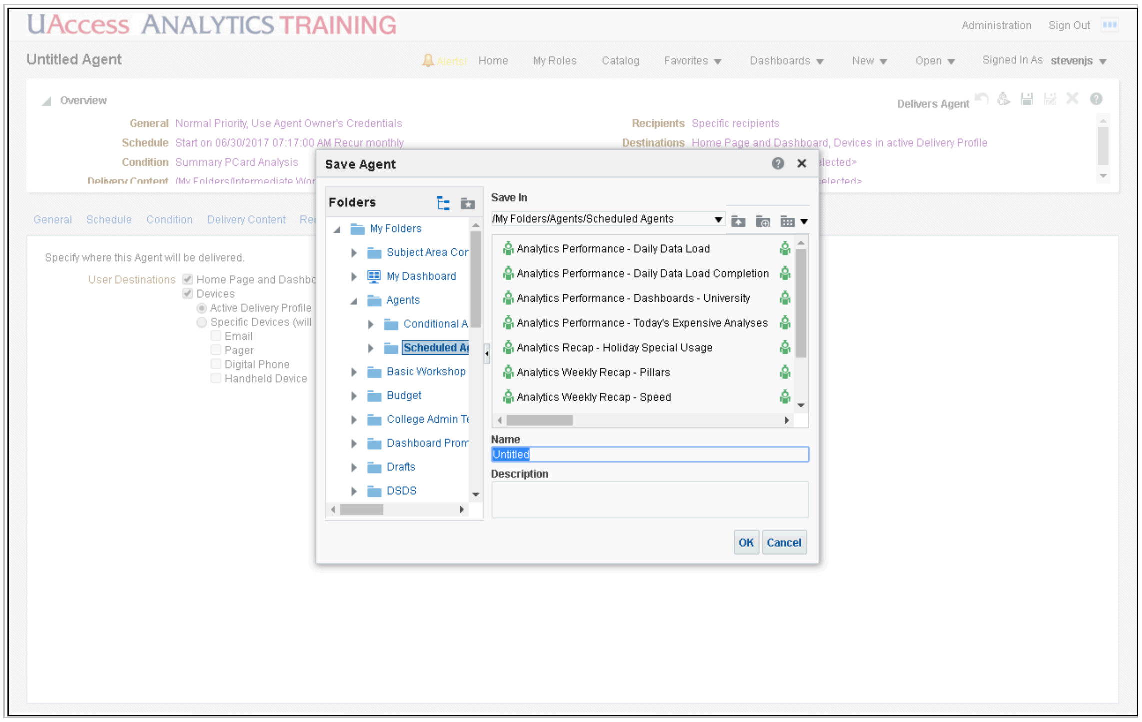


Step	Action
6.	You could have the system deliver the report on a specific day, such as the first Sunday or the third Tuesday. A suggestion would be to have the agent deliver the report on a specified date each month; perhaps the 8th day. Click the **Day** option. 
7.	Click the **Day** dropdown triangle. 
8.	Click the **8** list item. 

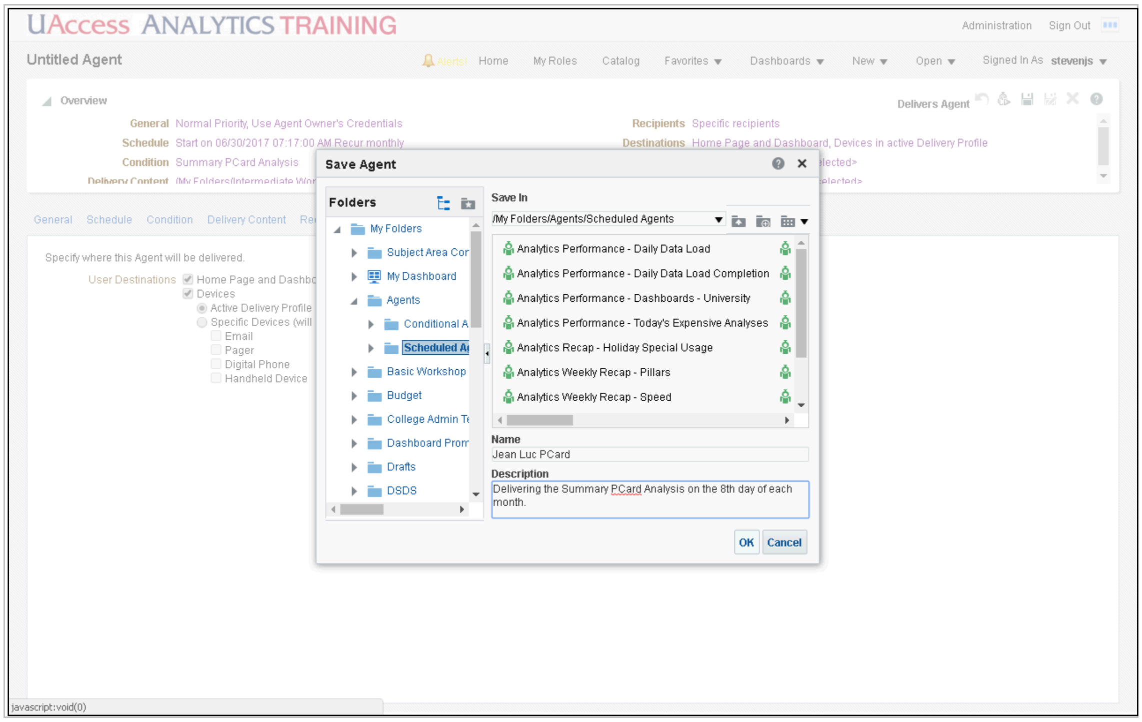


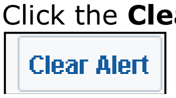
Step	Action
9.	You'll want the report delivered every month. Check all twelve checkboxes. Click the **month** checkbox.
10.	Most people prefer to have the analysis delivered in the morning. You'll have to change the time in the Start field. Click the **Select Date and Time** button. 
11.	You can ignore the calendar part of the screen. Just change the time field to your preferred delivery time. Be sure you select either AM or PM, as appropriate. Click the **Time Control** button. 
12.	Click the **OK** button. 
13.	Click the **Condition** tab. 

Step	Action
14.	The condition tab is already set up for you. The only condition you can determine here is how many rows do you want available in the analysis before the system delivers the report. So long as the report has at least one row of data, it will be delivered. Click the **Delivery Content** tab. 
15.	You'll need to make a couple of changes here. First, type in the subject line of the email message. You could also select a different format for delivery, but most people prefer the Device Default of HTML. That means the delivered report will look just like it does in Analytics. Enter "**Summary PCard Analysis**" in the **Subject** field.
16.	Click the **Recipients** tab. 
17.	You're already set up as the only recipient. In this case, because the analysis lives in your personal folder, you're the only possible recipient of this report. Click the **Destinations** tab. 
18.	The options here will determine where the report will be delivered. Home Page and Dashboard put the appropriate links in those places, as seen here in the book. If you select only Active Delivery Profile, the agent will deliver the analysis to your default, pre-determine email address. It's now time to save the agent. ***Note:*** *It may take up to two minutes for the system to save the agent. You don't need to click anything else on the screen to try to make it run faster.* Click the **Save This Agent** button. 



Step	Action
19.	Drill down to the proper folder, then give the agent a name. Enter "**Jean Luc PCard**" in the field.
20.	You might also consider adding some descriptive text. Enter "**Delivering the Summary PCard Analysis on the 8th day of each month.**" in the **Description** field.



Step	Action
21.	Click the **OK** button. 
22.	Once the agent has been saved, the Run Agent Now button will be activated. You can test your agent! Click the **Run Agent Now** button. 
23.	As soon as report has run, it will be delivered. Click the **OK** button. 
24.	Since the report was delivered to my Desktop, I can readily see the results. Click the **Alerts** button. 
25.	Click the **Summary PCard Analysis** list item.
26.	The analysis looks just the way it did in Analytics. Very good! Click the **Clear Alert** button. 

Step	Action
27.	Close the Alerts screen. Click the **OK** button. 
28.	Good job! **End of Procedure.**

Exercise 3 - Workshop Review

Workshop Review - Intermediate Reports and Dashboards

Workshop Review - Intermediate Reports and Dashboards

1. **True** **False** The only way to copy an analysis is to open it and save it into a new folder.

2. One way to add totals or subtotals to an analysis is to edit the table or pivot table. You can add the totals or subtotals on the ____________________ pane.

3. **True** **False** The only reason to use pivot tables is for the pivoting.

4. In order to add SQL coding to a data column, you must start on the ____________________ tab.

5. Variables can help filter an analysis so that it always displays data from the previous business day or the previous term, or some other relative value. Where can you find a list of variables?
____

6. When adding a new view, you can use the New View button at the top of the ____________________ pane or the button in the ____________________ pane.

7. **True** **False** Hiding a data column and excluding a data column have exactly the same effect on the analysis.

8. **True** **False** Dashboard prompts are static filtering tools.

9. An agent can deliver an analysis to you in several different ways. If you have the agent deliver the analysis to you via email, what are two examples (two formats) of how that data might be delivered? ____________________________ and ____________________________

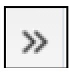
10. **True** **Yes** This was fun.

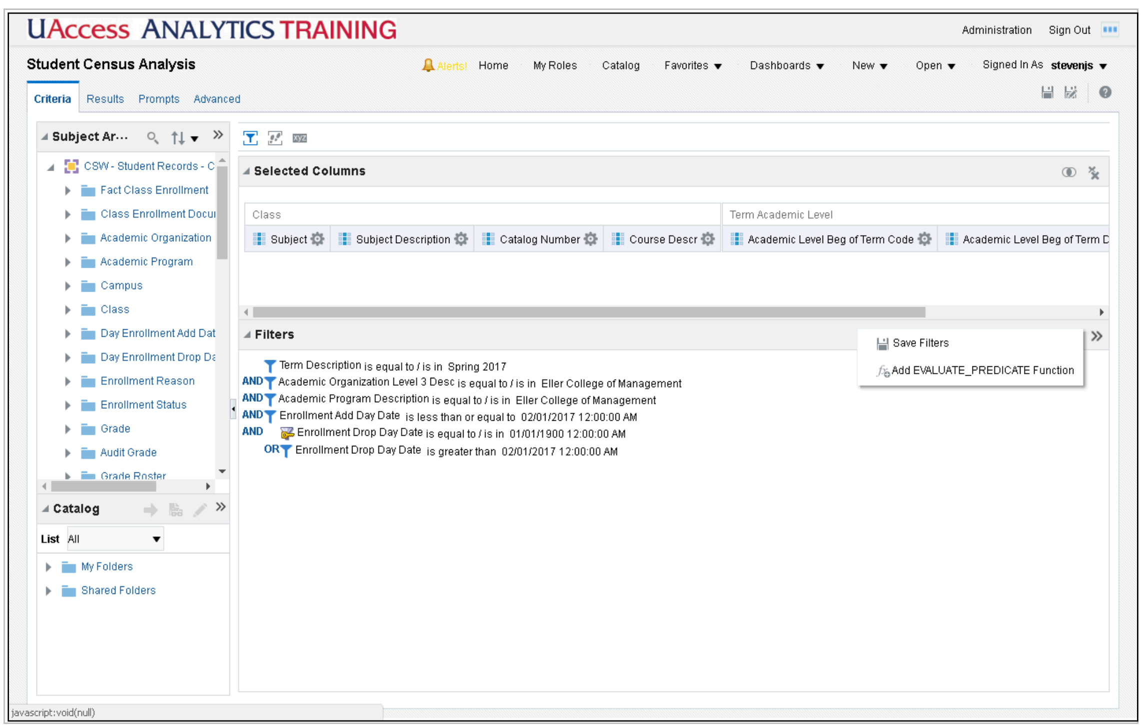
Appendix A: Saving the Filter

Saving the Filter

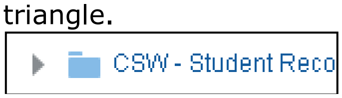
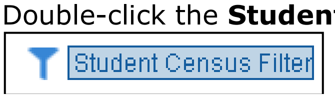
Procedure

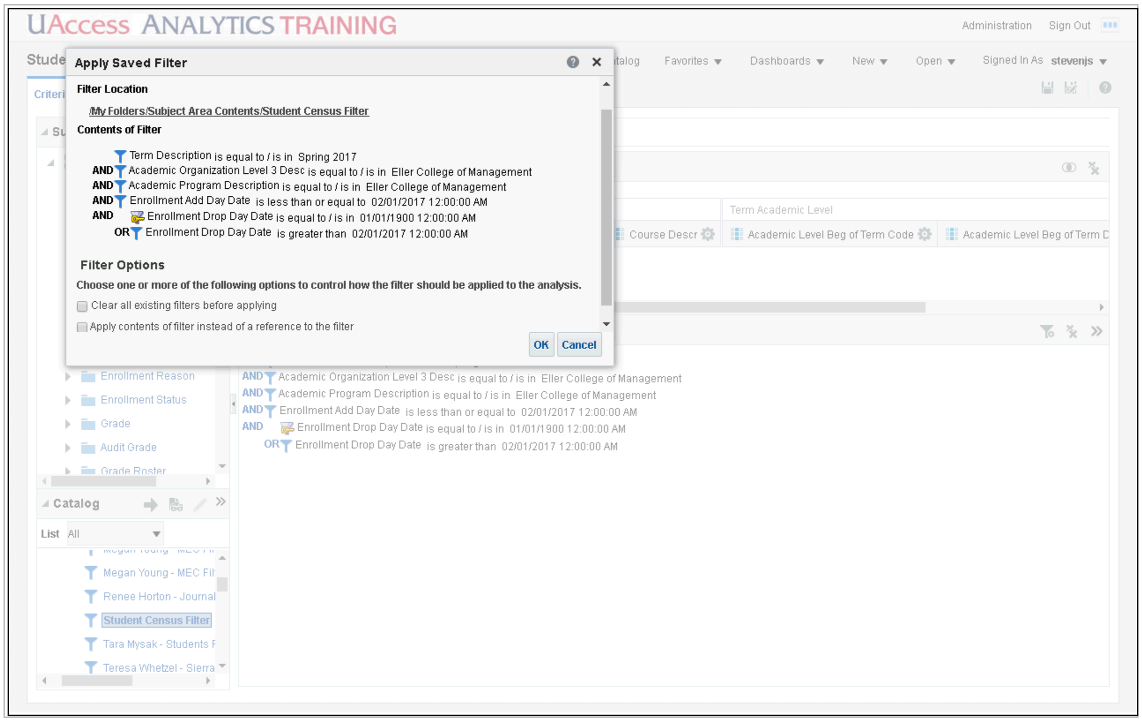
Sometimes, you'll want to save the filter you've built separately from the analysis.

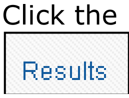
Step	Action
1.	Click the **Criteria** tab. 
2.	There are three buttons on the far right end of the Filters bar. Click the **More Options** button. 



Step	Action
3.	Click the **Save Filters** list item. 

Step	Action
4.	The filter will automatically be saved in your own personal folder, in a subfolder with the same name as the name of the Subject Area you used to create the analysis and filter. Enter "**Student Census Filter**" in the **Name** field.
5.	***Note:*** *In most cases, you will probably want to remove the checkmark from the Replace box in the lower left corner of the Save As screen. Leaving the box checked would replace your filter with a reference to the saved filter, which will reside in the folder noted previously. Most often, you will wish to have the copy of the filter reside in the folder and leave the original in the analysis.* Click the **Replace** checkbox.
6.	Click the **OK** button. 
7.	If you look in the **Catalog** pane in the lower left corner of the screen, you will find your saved filter. Saved filters can be used in other analyses, but only when they come from the same Subject Area as the filter. Double-click the **My Folders** list item. 
8.	Click the **CSW - Student Records - Class Enrollment** dropdown triangle. 
9.	To use the filter, simply double-click the filter or select the filter and click the **Add Filter** button. Double-click the **Student Census Filter** list item. 



Step	Action
10.	The **Apply Saved Filter** screen shows you where the filter is stored, what the filter contains, and gives you options for applying the filter. Click the **Cancel** button. 
11.	Click the **Results** tab. 
12.	**End of Procedure.**

Appendix B: SQL Examples

SQL Examples

SQL Examples

The following SQL examples are for illustration purposes only. You should examine the online **Analytics Help** documentation for further, more precise information. There are also many more situations where other types and cases of SQL code might come in handy. Those situations are beyond the scope of this simple document.

CASE (If)

The CASE statement evaluates each WHEN condition and, if satisfied, assigns the value in the corresponding THEN expression.

If none of the WHEN conditions are satisfied, it assigns the default value specified in the ELSE expression. If no ELSE expression is specified, the system automatically adds an ELSE NULL.

Example 1 (designed to change the values displayed in the analysis):

```
CASE
WHEN "- Demographics"."Veteran Flag" = Y
THEN ‘Veteran’
ELSE ‘NonVet’
END
```

- CASE starts the statement. Must be followed by one or more WHEN and THEN statements, an optional ELSE statement, and the END keyword
- WHEN specifies the condition to be satisfied
- THEN specifies the value to assign if the corresponding WHEN expression is satisfied
- ELSE specifies the value to assign if none of the WHEN conditions are satisfied. If omitted, ELSE NULL is assumed
- END ends the statement

Example 2 (designed for filtering purposes):

```
CASE
WHEN "Table Name"."Column Name" = 'desired value'
THEN 1
ELSE 0
END
```

This particular case statement is useful when trying to limit values from a particular data column, and a more standard filter just isn't working for you. Once you have the case statement in place, create a filter for the data column, then filter to either "1" or "0" to get your desired results.

CAST

This function changes the data type of an expression or a null literal to another data type.

For example, you can cast numeric text in an imported My Analytics List as an INTEGER (no decimal places) or DOUBLE PRECISION (decimal places) so that you can perform mathematical functions.

Commonly used data types: CHARACTER or CHAR, INTEGER or INT, DOUBLE PRECISION, DATE, TIME, TIMESTAMP

Example: CAST (“My Analytics List”.”Anniversary Date”) AS DATE

IFNULL

This function tests if an expression evaluates to a null value, and if it does, assigns the specified value to the expression. You can use this to populate a cell in an analysis even if the underlying data doesn’t exist. The last value in the parentheses is what will be placed in the otherwise empty cell.

Examples:
IFNULL(“Measures”.”Amount”, 0) - returns a zero (0) rather than a blank cell
IFNULL(“Student”.”Middle Name”, ‘NMN’) - returns NMN rather than a blank cell for those people who have no middle name

ROUND

This function rounds a NUMERIC EXPRESSION to *n* DIGITS of precision.

For example, you may average all of the GPAs for a particular set of students. That average may give you a number with more than three decimal places. Therefore, you could round that average to return just three decimal places.

Example: ROUND(AVG("Measures"."GPA"), 3)

- NUMERIC EXPRESSION is any column that evaluates to a numeric value
- INTEGER (or digit) is any positive integer that represents the number of digits of precision

Appendix C: Designing Effective Graphs

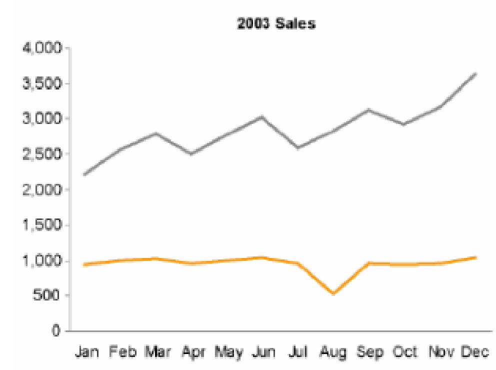
Designing Effective Graphs

Designing Effective Graphs

Seven commong quantitative relationships in graphs and how to display them. [1]

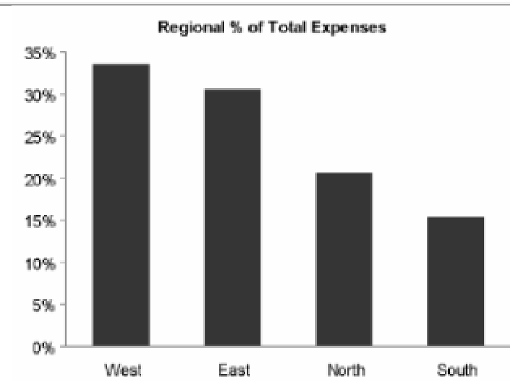
Time Series
Expresses the rise and fall of values through time.

- Use lines to emphasize overall pattern
- Use bars to emphasize individual values
- Use points connected by lines to slightly emphasize individual values while still highlighting the overall pattern
- Always place time on the horizontal axis



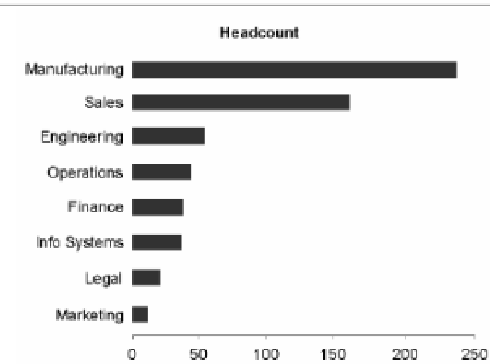
Part-to-Whole
Expresses the portion of each part relative to the whole

- Use bars only (horizontal or vertical)
- Use stacked bars only when you must display measures of the whole as well as the parts



Ranking
Expresses values in order by size.

- Use bars only (horizontal or vertical)
- To highlight high values, sort in descending order
- To highlight low values, sort in ascending order



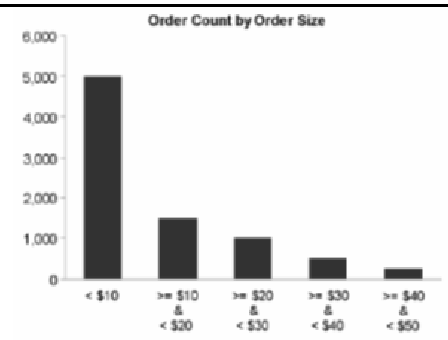
Show Me the Numbers: Designing Tables and Graphs to Enlighten.
Few, Stephen. 2004. Oakland, CA: Analytics Press

Distribution

Expresses a range of values as well as the shape of the distribution across that range.

Single Distribution:

- Use vertical bars to emphasize individual values
- Use lines to emphasize the overall shape



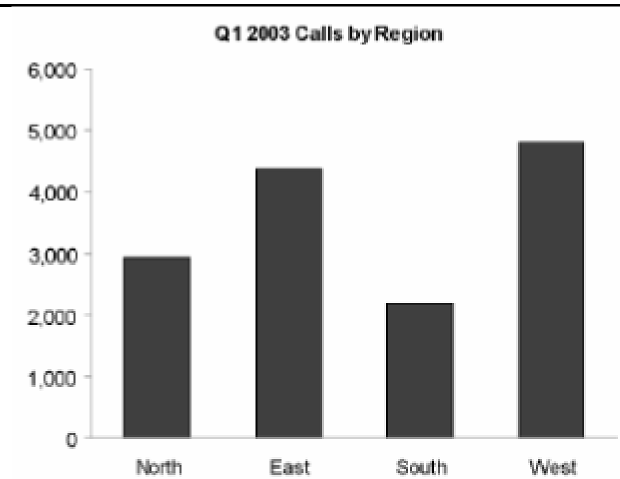
Multiple Distributions:

- Use vertical or horizontal bars (a.k.a. range bars or boxes) to encode the full range from the low value to the high value, or some meaningful portion of the range (for example, 90% of the values)
- Use points or lines together to encode measures or center (for example, the median)

Nominal Comparison

Simply expresses the comparative sizes of multiple related but discrete values in no particular order.

- Use bars only (horizontal or vertical)



<table>
<tr>
<td>Deviation
Expresses how and the degree to which one or more things differ from another.
Use lines to emphasize the overall pattern only when displaying deviation and time-series
relationships together
Use points connected by lines to slightly emphasize individual data points while also highlighting the overall pattern when displaying deviation and time-series relationships together
Use bars to emphasize individual values, but limit to vertical bars when a time-series relationship is included
Always include a reference line to compare the measures of deviation against</td>
<td>
</td>
</tr>
<tr>
<td>Correlation
Expresses how two paired sets of values vary in relation to one another.
Use points and a trend line in the form of a scatter plot.</td>
<td>
</td>
</tr>
</table>

Appendix D: Creating the Dashboard Prompt

Dashboard Prompt Options

Dashboard Prompt Options
What Types of User Input Options Can I Use With a Dashboard Prompt?

As you create your prompt, you must specify the prompt's user interface component. This enables the user to enter a prompt value on the dashboard page. You can select from several user input options. The Radio Button and Text Field options allow the user to specify *only one* prompt value. The Check Boxes, Choice List, and List Box options allow the user to select either one or multiple prompt values. The Slider option enables the user to select multiple values by specifying a range of values, or all values that are lesser than or greater than a specified value (for example, include everything equal to 200 and greater). Note that the input option types that are available depend upon the column type that you are working with. The following sections provide information about each input option.

Check Boxes

The Check Boxes input option provides the user with a visible list of all prompt values where a checkbox displays before each value item. This input option is suitable for a prompt that contains a smaller set of data. This user input type automatically enables the user to select one or more prompt values. To select a specific prompt value, the user scans the list and clicks the box that corresponds to a particular item.

Note: The ***List Box*** *input option (below) is suitable for a prompt that contains a larger set of data.*

Choice List

The Choice List input option provides the user with a collapsed list of all prompt values. This option is useful for a long list of values where you want to provide the user with the ability to search for a specific value. You can set up this user input type to accept only one prompt value or multiple prompt values.

This input option provides a field and list that, when the user clicks the down-arrow button, expands and contains a list of all prompt values. To select a specific prompt value from the expanded list, the user scrolls through the list (or searches the list) and clicks the box that corresponds to a particular value.

List Box

The List Box input option provides the user with a visible list of all prompt values. This input option is suitable for a prompt that contains a large set of data. You can set up this user input type to allow the user to select only one prompt value or multiple prompt values by using Ctrl+ click or Shift+ click.

To select a specific prompt value, the user scans the list and selects the prompt value name (for example, College of Medicine), similar to how a user would click a hyperlink. The List Box option is very similar to the Check Boxes option, but the List Box option does not include a box before each value item.

*Note: The **Check Boxes** input option (above) is suitable for a prompt that contains a smaller set of data.*

Radio Buttons

The Radio Buttons input option provides the user with a visible list of all prompt values where a Radio Button is displayed before each prompt value. This option type is useful for short lists of values where the user is to select only one prompt value. To select a prompt value, the user scans the list and selects the radio button that corresponds to a particular item.

Slider

You can use the Slider input option for numeric data values only. Depending upon the operator that you select, this option enables the user to select multiple values by specifying a range of values, or all values that are lesser than, greater than, or equal to a specified value. You select the Slider option to provide the user with a number line representation of the range of prompt values. The number line displays the prompt values in a range, for example 10,000 to 20,000. To select a prompt value, the user can either click a value on the number line or click and drag the thumb to select the desired value. A spinner box is also provided with up and down-arrow buttons that the user can click to select the desired value. If you selected the Slider option and the *is between* operator for the prompt, then the user can click and drag two thumbs to select the desired range of values for the prompt. Two spinner boxes are provided where you can either type or use the up and down-arrow buttons to specify a range of values.

Text Field

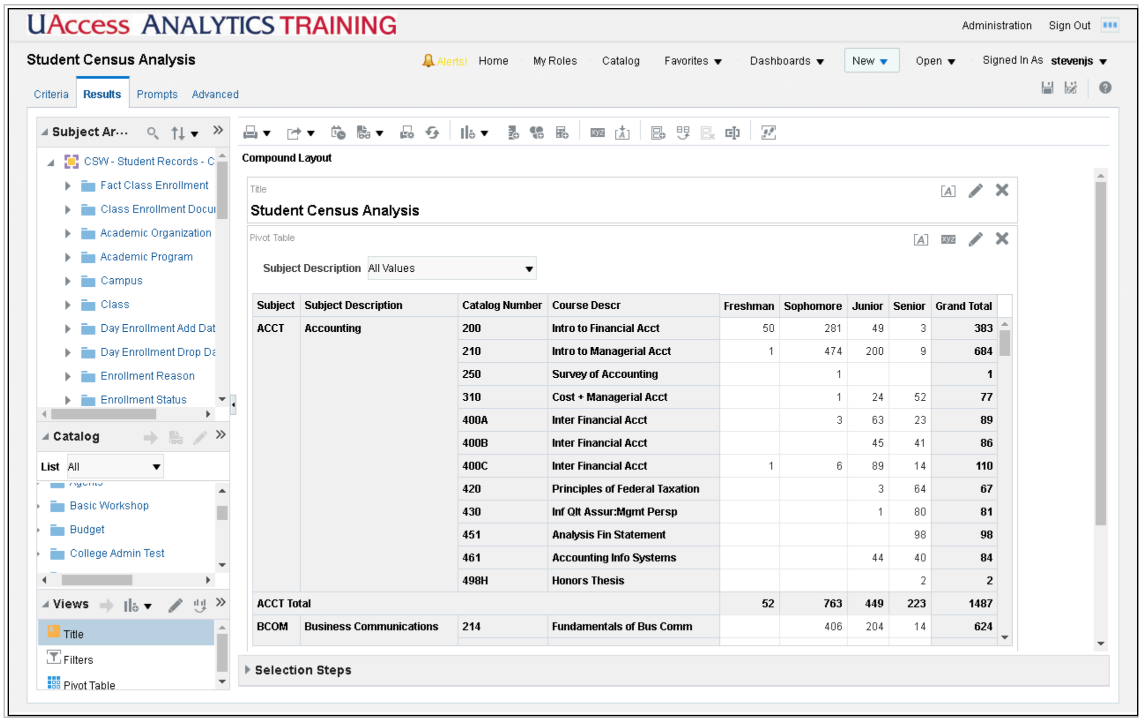
The Text Field input option provides the users with a field into which they can type a specific prompt value. You cannot use this option for multiple prompt values. Only the field and the field label display for this option. This option is useful in instances where the user knows the prompt value and does not have to search for it, or for prompts with numeric values. Note that the prompt value that you enter must match the column's value. For example, if a column's data values include EDUCATION (in all capital letters), then the user must type EDUCATION into the text field. Numeric values cannot contain commas.

Term Prompt

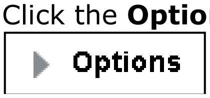
Procedure

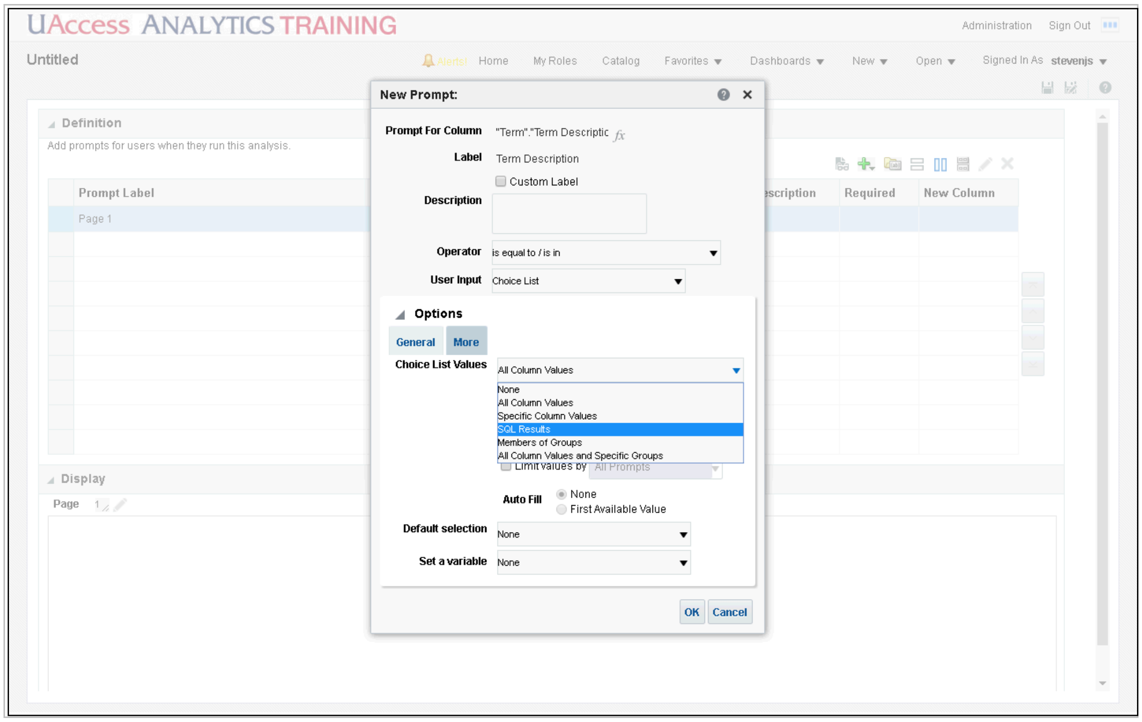
You've created the Student Census Analysis and have modified it to work with a dashboard prompt.

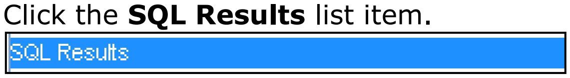
It's time to create the dashboard prompt.

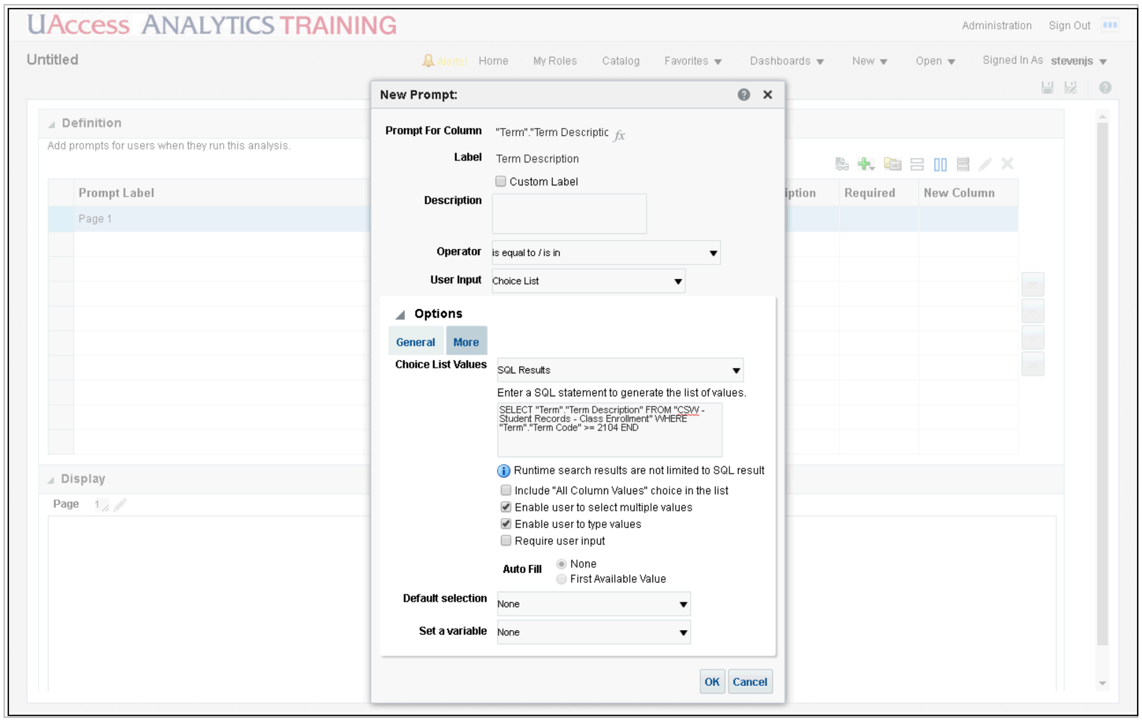


Step	Action
1.	Click the **New** link. 
2.	Click the **Dashboard Prompt** list item. 
3.	Scroll down through the list of subject areas until you locate the subject area used to create the analysis. Click the **CSW - Student Records - Class Enrollment** list item. 

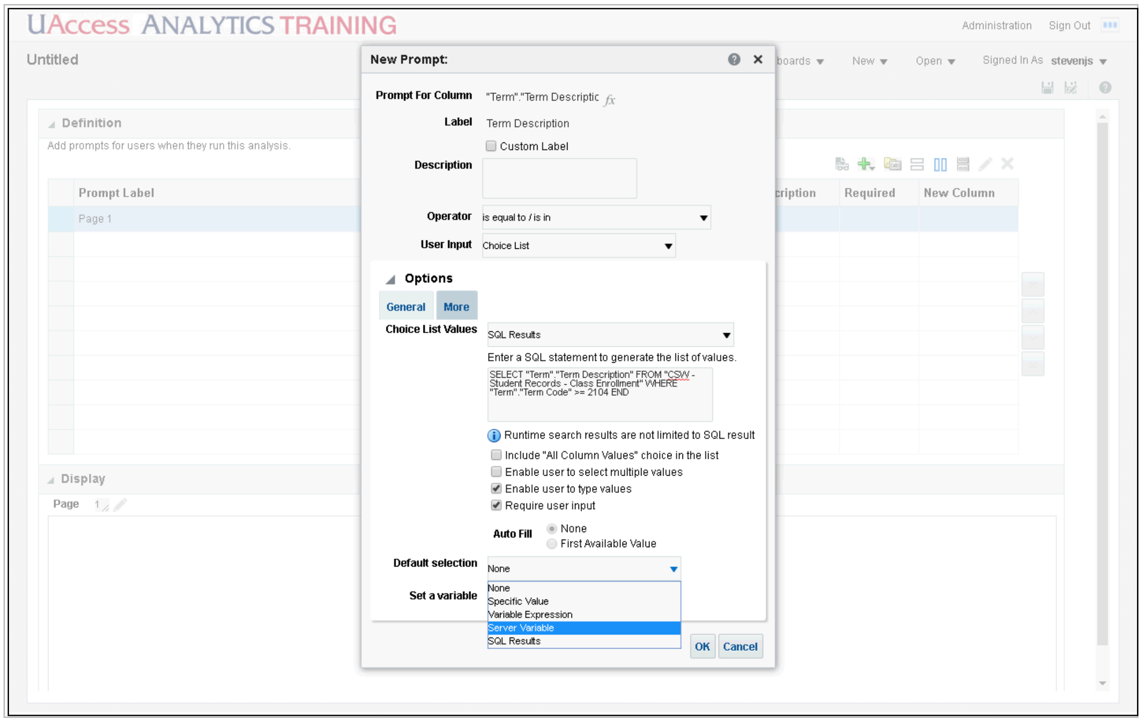
Step	Action
4.	This is the Dashboard Prompt edit screen. The **Definition** pane is at the top and the **Display** pane is at the bottom. There is a small button bar on top of the right side of the Definition pane. Click the **New Prompt (green + sign)** button. 
5.	Click the **Column Prompt** list item. 
6.	Scroll down through the Select Column window to find the Term table. Double-click the **Term** list item. 
7.	Click the **Term Description** list item. 
8.	Click the **OK** button. 
9.	The fields for a basic prompt are already filled out for you. You can make changes if you wish, and can add some options. Click the **Options** dropdown triangle. 
10.	Click the **Choice List Values** dropdown button to activate the menu.

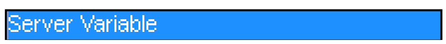


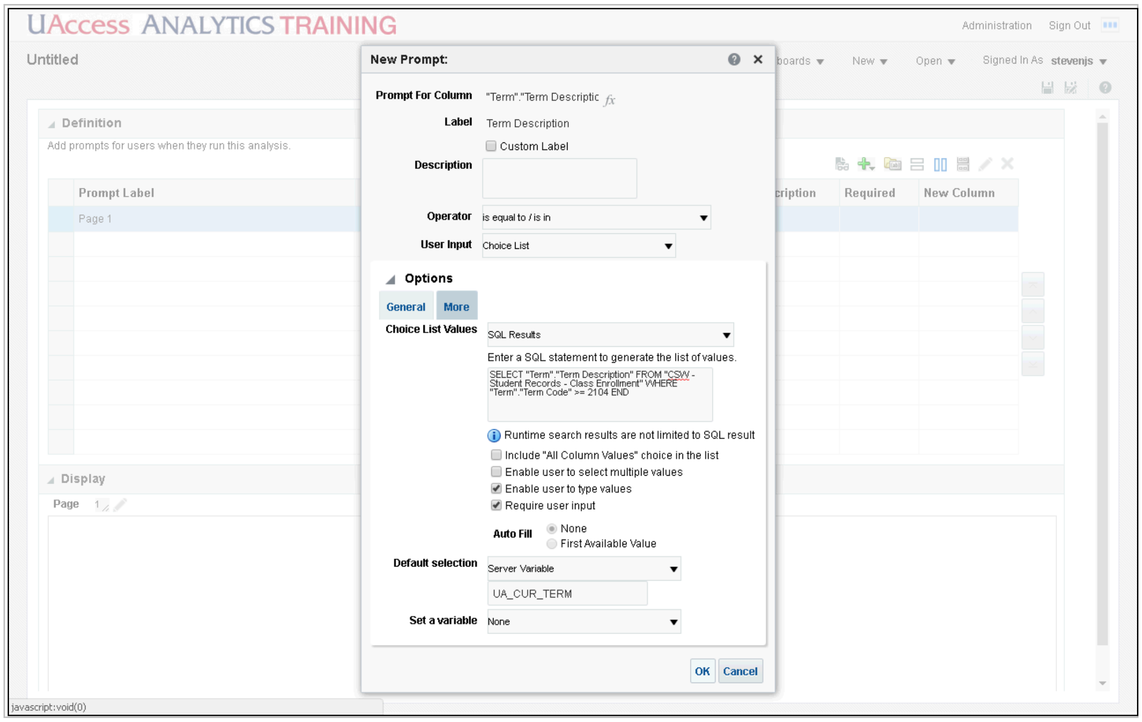
Step	Action
11.	Click the **SQL Results** list item. 
12.	The text that is automatically entered by the system in the SQL Results text field is okay as far as it goes. What the code is telling the system is that the user is going to select a value from the Term Description list. You can add some additional coding text to restrict the list to Fall 2010 or later. SQL coding can be very particular about syntax, so be sure to enter this information properly. Enter "**WHERE "Term"."Term Code" >= 2104 END**" in the **SQL Results** field.



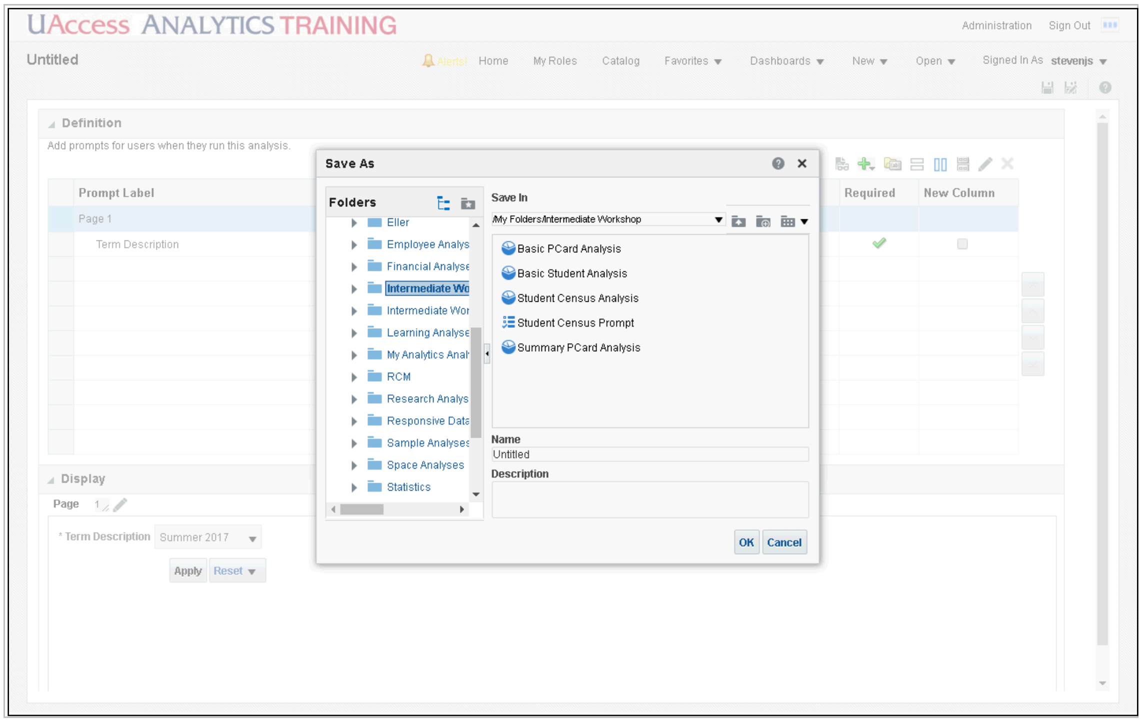
Step	Action
13.	You only want to let the user select one term at a time, so uncheck this box. Click the **Enable user to select multiple values** checkbox. ☑ Enable user to select multiple values
14.	You always want the user to make an entry in this prompt field. Click the **Require user input** checkbox. ☐ Require user input
15.	The default selection is "blank." You can set the prompt to always select the current term. Click the **Default selection** dropdown button to activate the menu.



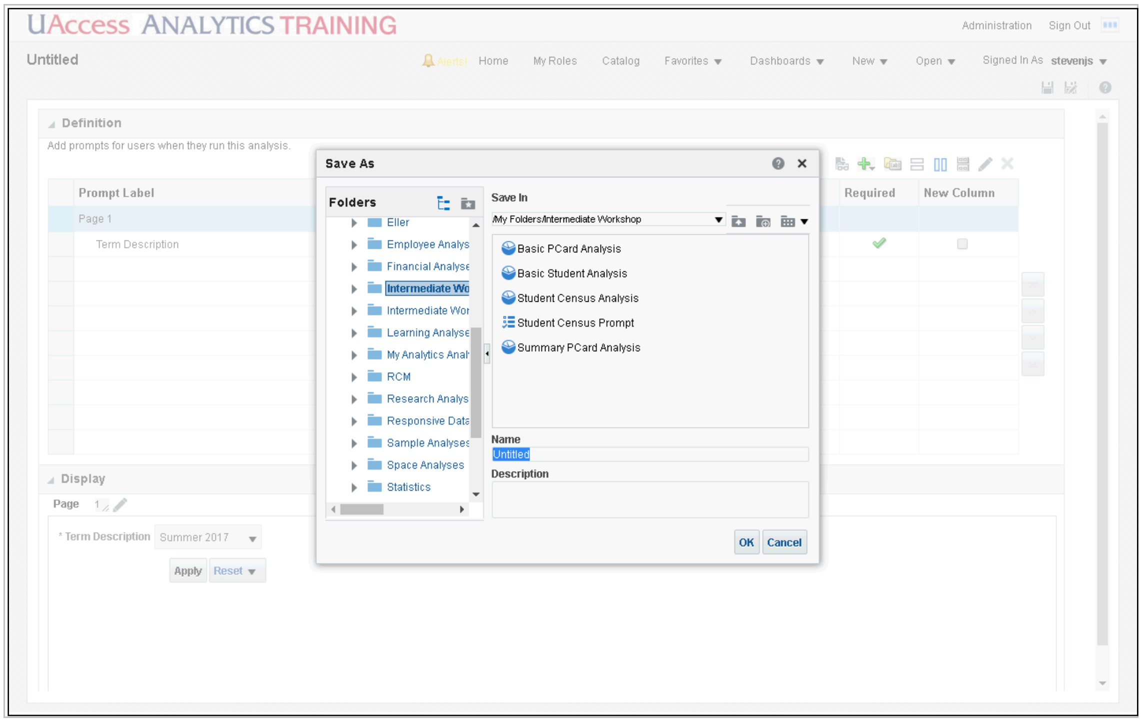
Step	Action
16.	Click the **Server Variable** list item. 
17.	You can use variables here, too. Enter "**UA_CUR_TERM**" in the **Default Selection** field.



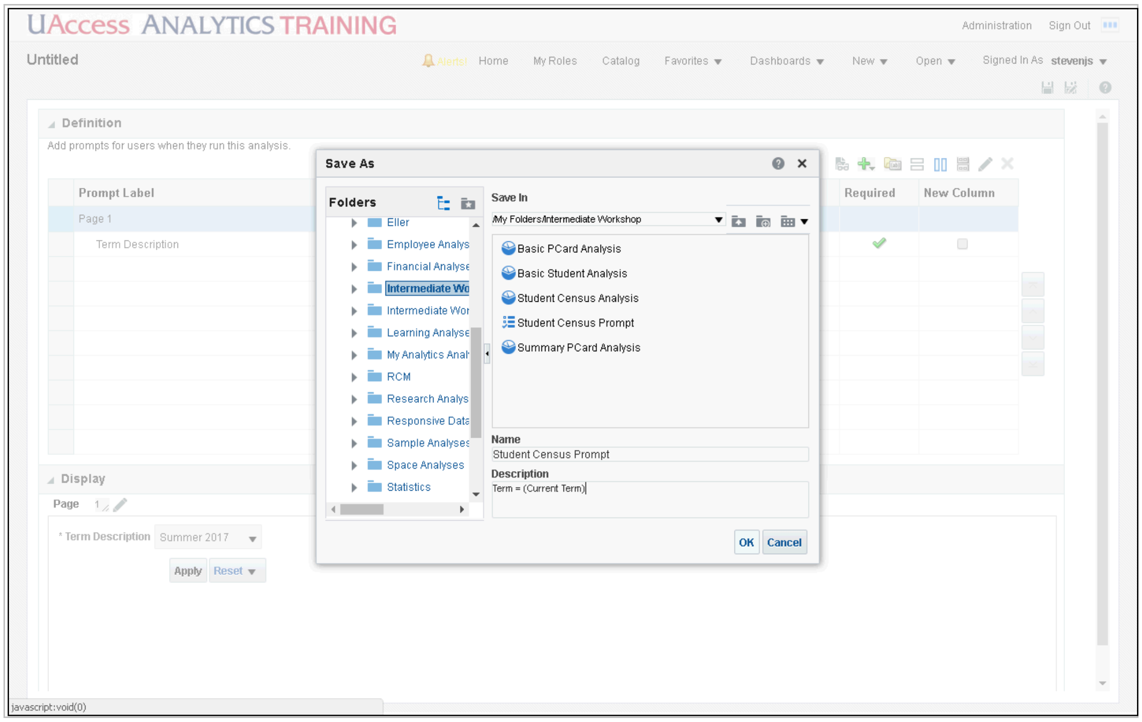
Step	Action
18.	Click the **OK** button. 
19.	Click the **Save Prompt** button. 



Step	Action
20.	Save your new prompt in the Intermediate Workshop folder. Click the **Intermediate Workshop** list item. 



Step	Action
21.	Enter "**Student Census Prompt**" in the **Name** field.
22.	You can also provide some descriptive information, if you wish. Enter "**Term = (Current Term)**" in the **Description** field.

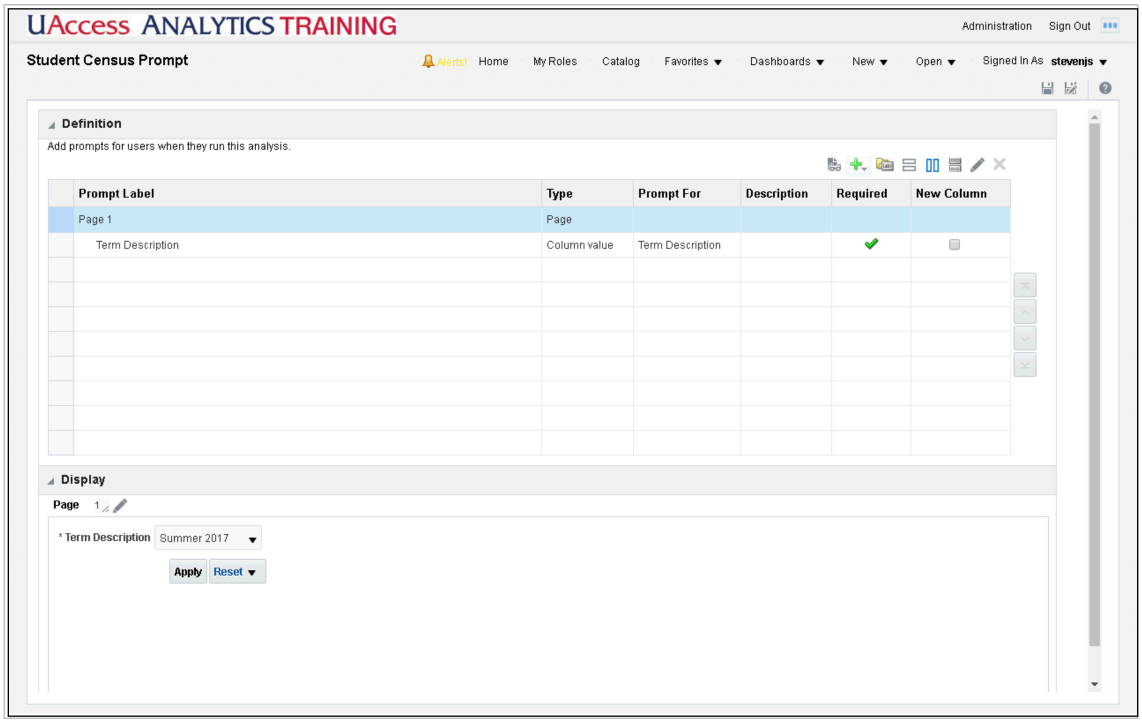


Step	Action
23.	Click the **OK** button. 
24.	That's the first of three prompts. **End of Procedure.**

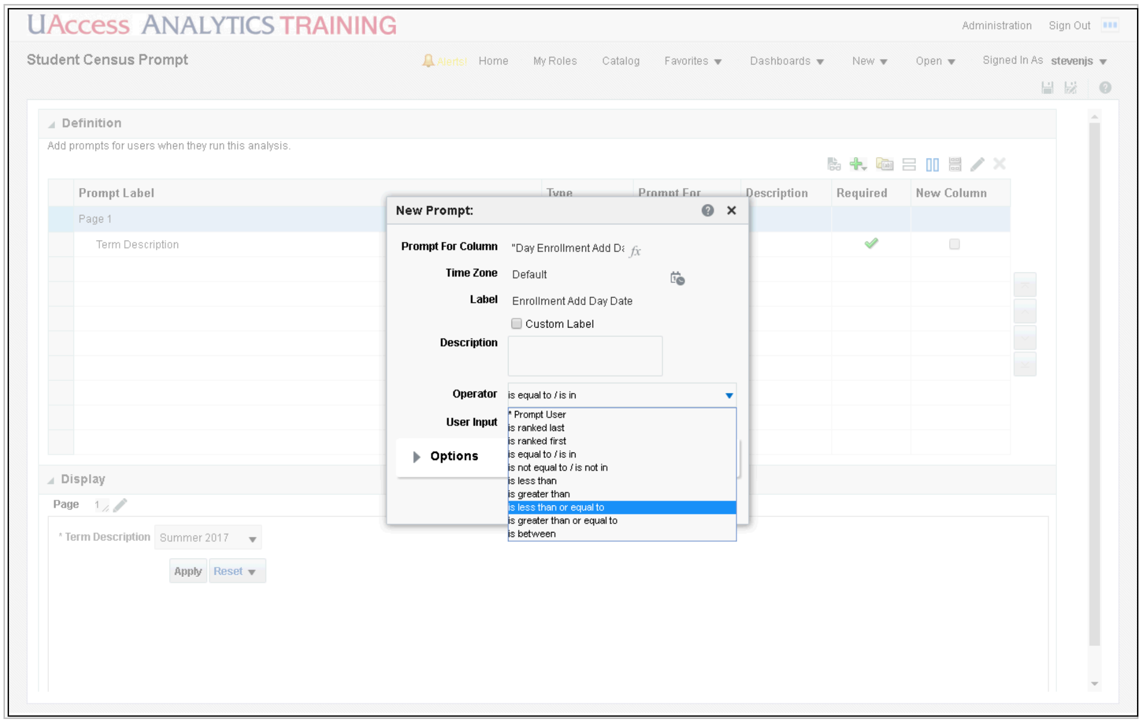
Enrollment Add Day Date Prompt

Procedure

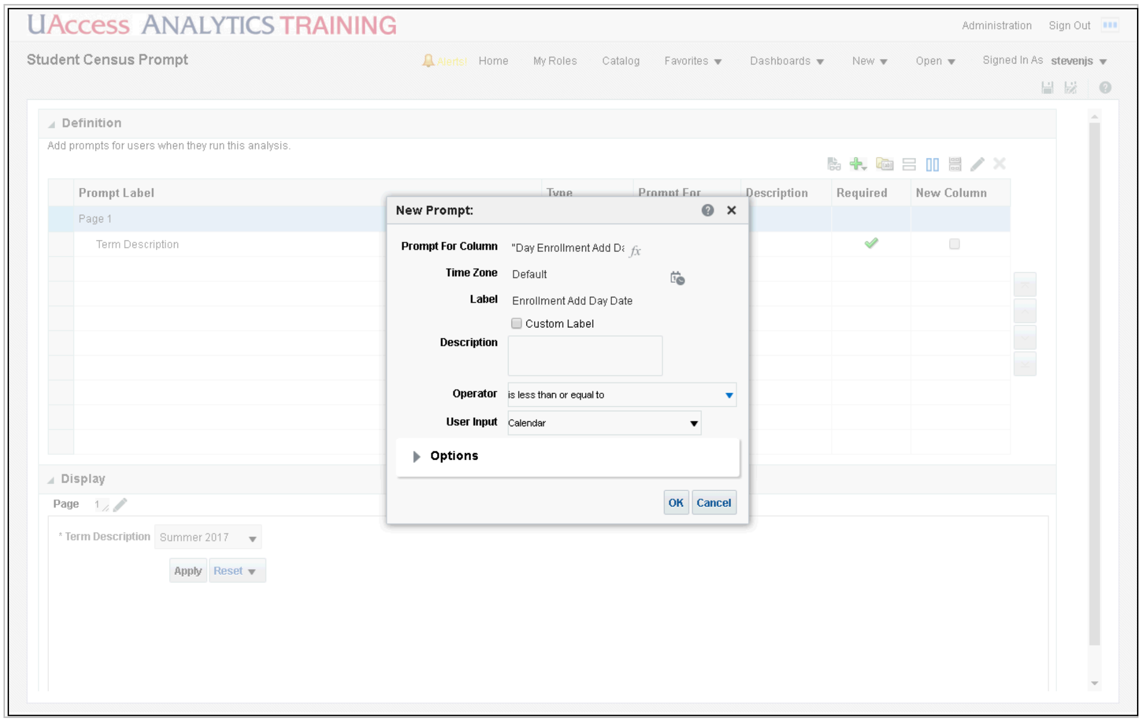
Now add a prompt for the Enrollment Add Date.

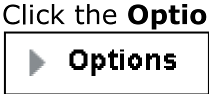
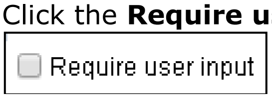


Step	Action
1.	Click the **New Prompt** button. 
2.	Click the **Column Prompt** list item. Column Prompt...
3.	Double-click the **Day Enrollment Add Date** list item. Day Enrollment Add Date
4.	Click the **Enrollmnt Add Day Date** list item. Enrollment Add Day Date
5.	Click the **OK** button. OK
6.	This prompt should help you to capture students who have added classes on or before the specified date. Click the **Operator** dropdown button to activate the menu.



Step	Action
7.	Click the **is less than or equal to** list item. 



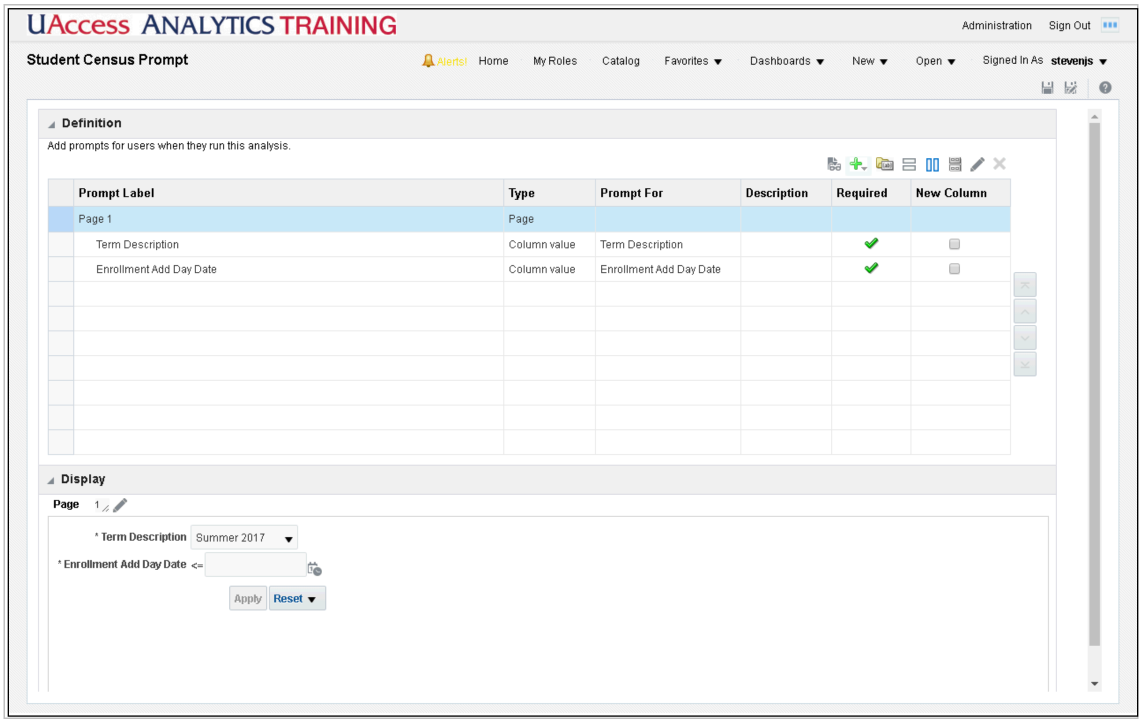
Step	Action
8.	Click the **Options** dropdown triangle. 
9.	Make this a mandatory field for anyone who uses the prompt. Click the **Require user input** checkbox. 
10.	Click the **OK** button. 
11.	You've made a change to the original prompt you saved when you created it. You need to add some info to the description field. Click the **Save As** button. 
12.	Enter "**Enrollment Add Date <= (blank)**" in the **Description** field.
13.	Click the **OK** button. 

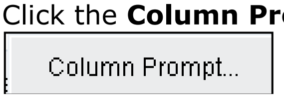
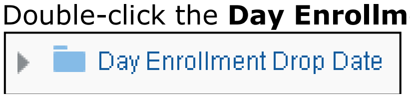
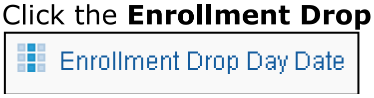
Step	Action
14.	You used the Save As button, so you're going to have to overwrite the original prompt. That's perfect. Click the **OK** button. 
15.	That's the second of three prompts. **End of Procedure.**

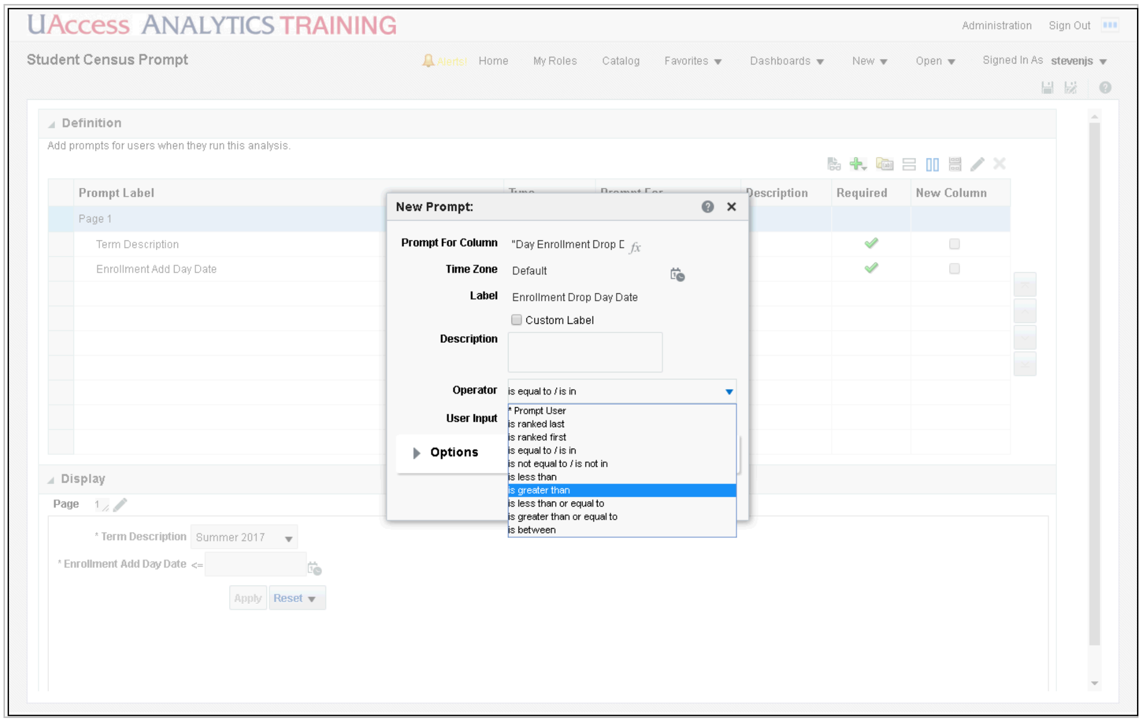
Enrollment Drop Day Date Prompt

Procedure

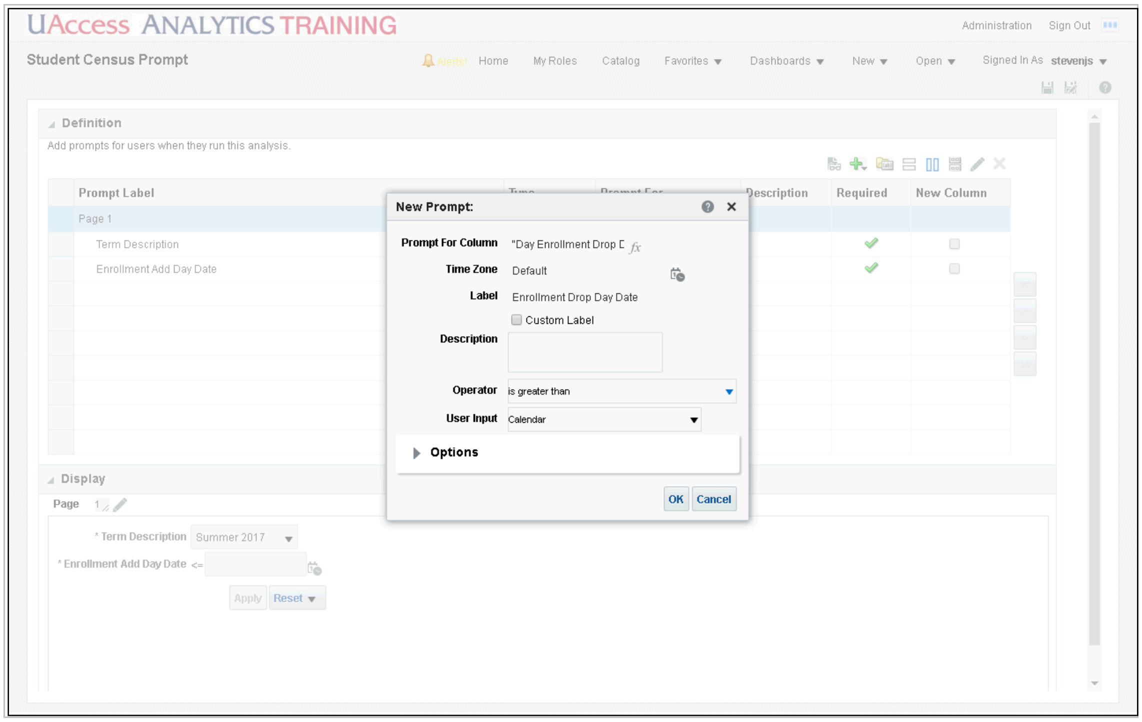
Add one last prompt to exclude students who've dropped classes after the specified date.

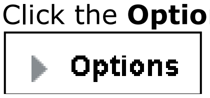
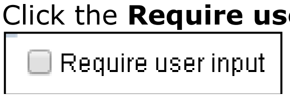


Step	Action
1.	Click the **New Prompt** button. 
2.	Click the **Column Prompt** list item. 
3.	Double-click the **Day Enrollment Drop Date** list item. 
4.	Click the **Enrollment Drop Day Date** list item. 
5.	Click the **OK** button. 
6.	Click the **Operator** dropdown button to activate the menu.



Step	Action
7.	If a student dropped a class *after* the specified date, that's okay. We want to keep that student. Click the **is greater than** list item. 

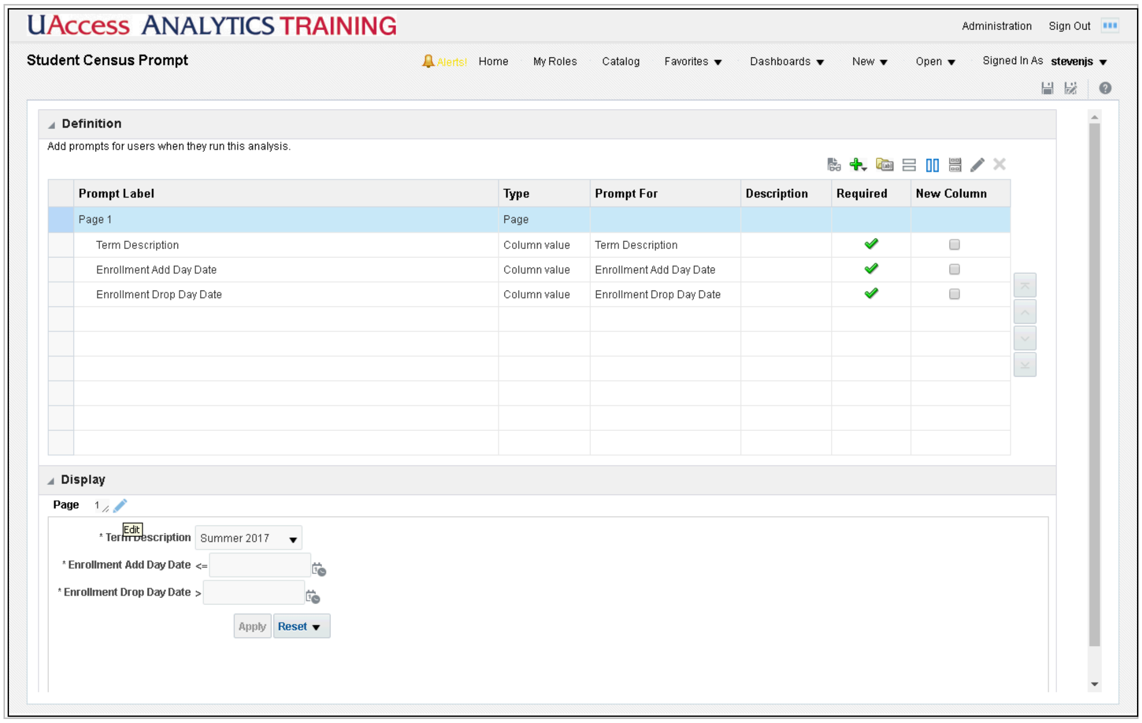


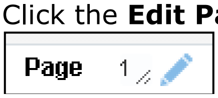
Step	Action
8.	Click the **Options** dropdown triangle. 
9.	Once again, this prompt should be mandatory for anyone using the prompt. Click the **Require user input** checkbox. 
10.	Click the **OK** button. 
11.	Click the **Save As** button. 
12.	Enter "**Enrollment Drop Date > (blank)**" in the **Description** field.
13.	Click the **OK** button. 
14.	Click the **OK** button. 
15.	That was the last of three prompt fields. **End of Procedure.**

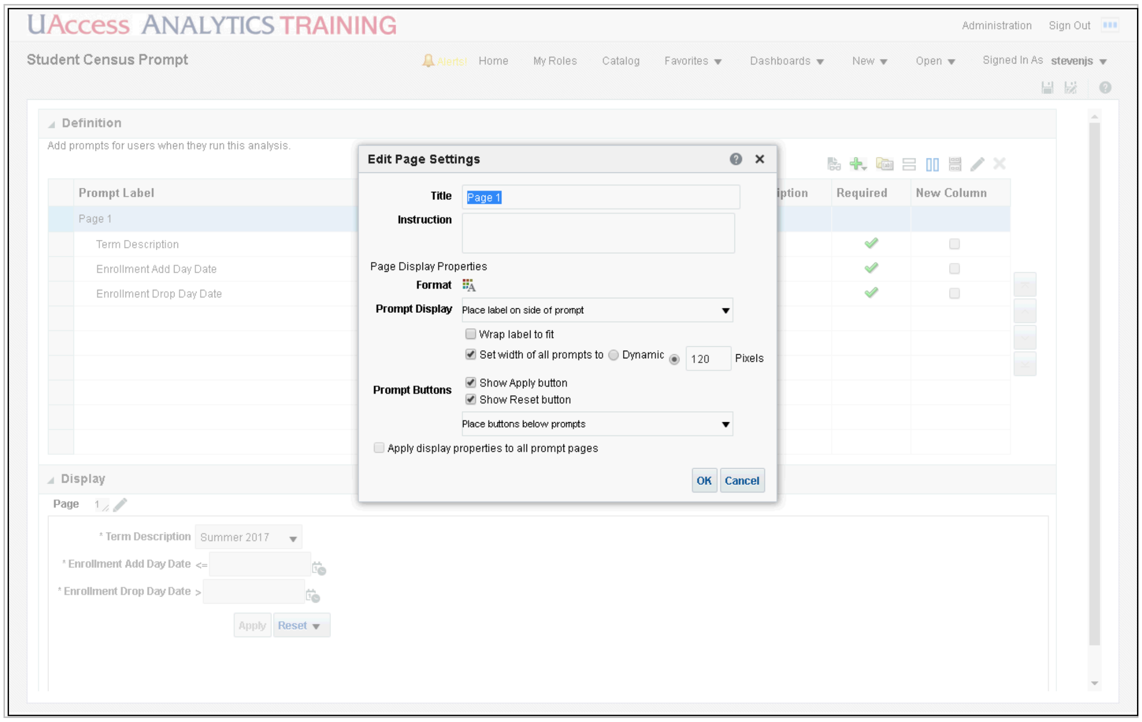
Edit Page Settings

Procedure

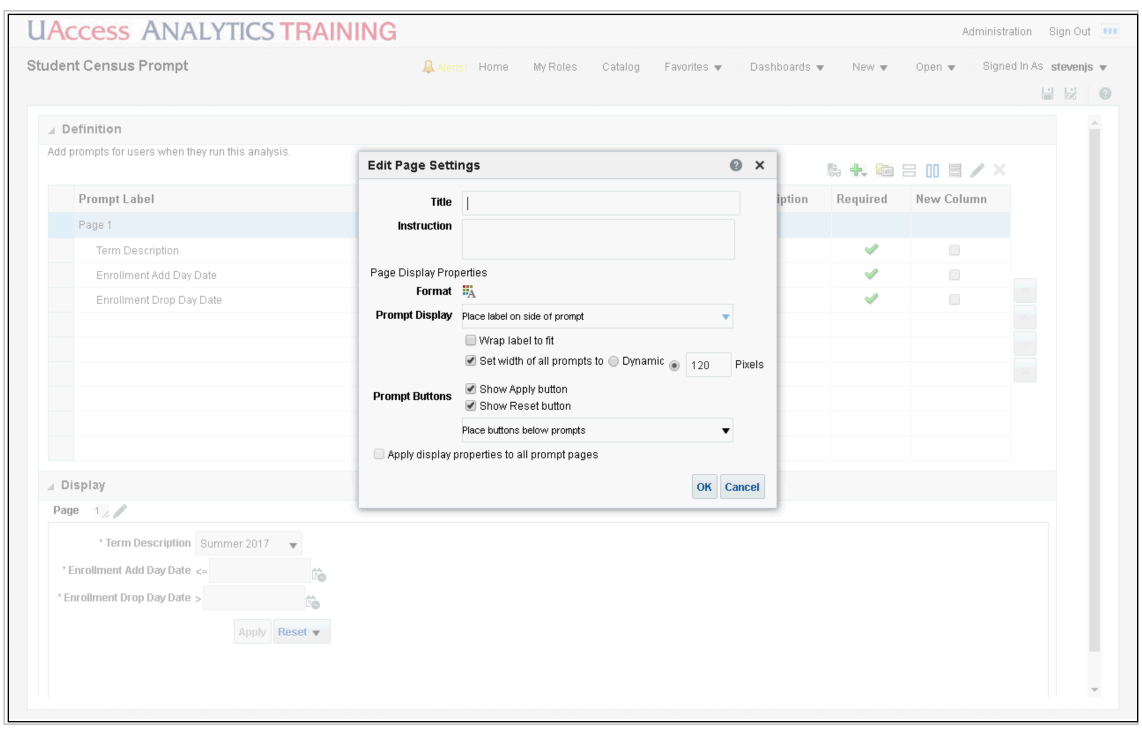
The last thing you should do is make sure your formatting is set up how you like it.



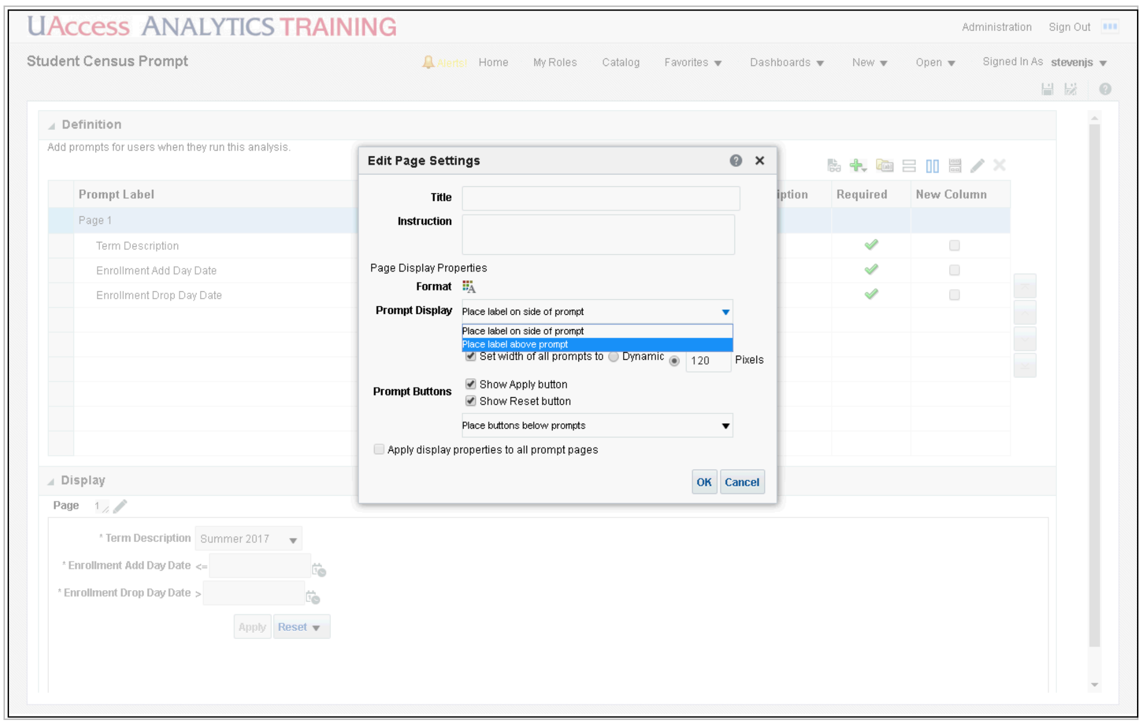
Step	Action
1.	Click the Edit Page icon in the Display pane. Click the **Edit Page** button. 



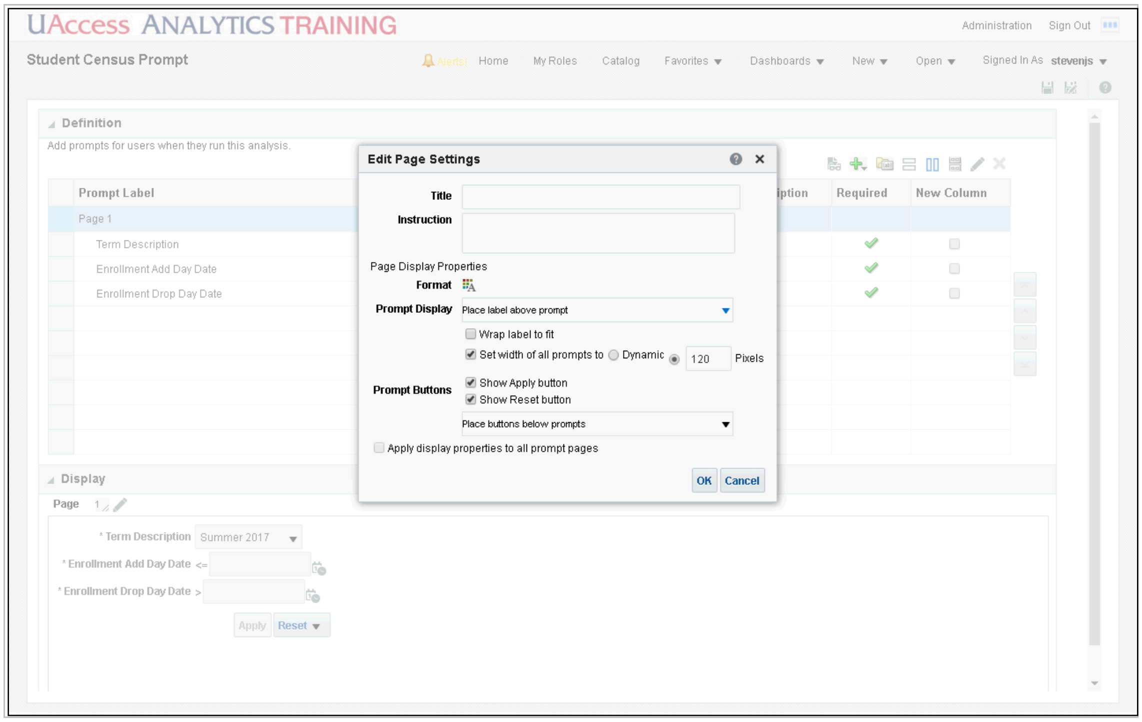
Step	Action
2.	Highlight and delete the text in the Title box. Release the mouse button.



Step	Action
3.	The standard prompt display has the prompt field name positioned above the prompt field. Click the **Prompt Display** dropdown button to activate the menu.



Step	Action
4.	Click the **Place label above prompt** list item. Place label above prompt



Step	Action
5.	Let the system adjust the widths of each prompt field. Click the **Dynamic** option. 
6.	Click the **OK** button. 
7.	That looks pretty good. Click the **Save Analysis** button. 
8.	Good job! **End of Procedure.**