UAccess Analytics: Basic Reports and Dashboards

COPYRIGHT & TRADEMARKS

Copyright © 2012, Arizona Board of Regents. All rights reserved.

<table>
<thead>
<tr>
<th>Date</th>
<th>Version #</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/01/2012</td>
<td>1.00</td>
<td>Original</td>
</tr>
<tr>
<td>06/01/2012</td>
<td>1.10</td>
<td>Corrected some capitalization errors.</td>
</tr>
</tbody>
</table>
# Table of Contents

**About this Workshop** ................................................................................................................................. v  
**Access to Analytics Data** ............................................................................................................................... v  
**Mosaic Community** ....................................................................................................................................... v  

**Getting Around in Analytics** ....................................................................................................................... 1  
- Working with the Home Page ........................................................................................................................ 1  
- Working with the Global Header ................................................................................................................... 15  
- Review - Home Page and Global Header ...................................................................................................... 25  

**Working with Analyses** ............................................................................................................................... 27  
- Analytics Data ................................................................................................................................................ 27  
- Creating a New Analysis ................................................................................................................................. 30  
- Filtering an Analysis ....................................................................................................................................... 36  
- Working with Columns ................................................................................................................................... 48  
- Editing the Table View .................................................................................................................................... 58  
- Exercise - Creating a New Analysis .............................................................................................................. 70  
- Adding a Graph ................................................................................................................................................ 72  
- Exercise - Adding a New View ...................................................................................................................... 92  

**Working with Dashboards** ............................................................................................................................ 94  
- Creating a New Dashboard ............................................................................................................................. 94  
- Working with Dashboard Functionality ......................................................................................................... 106  
- Review - Working with Dashboards ............................................................................................................. 120  

**Appendix A** ................................................................................................................................................ 122  
- Adding a Pivot Table ...................................................................................................................................... 122  

**Index** .......................................................................................................................................................... 132
About this Workshop

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

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

For information on additional workshops in which you can further your knowledge of Requests and Dashboards, please go to the Workshops and Training Team website at [http://workshops.arizona.edu](http://workshops.arizona.edu).

Access to Analytics Data

Request for Individual access to UAccess Analytics can be submitted to [https://request.uaccess.arizona.edu](https://request.uaccess.arizona.edu).

Mosaic Community

The Mosaic 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 request membership in the Mosaic Community. Just go to [http://mosaic.community.arizona.edu](http://mosaic.community.arizona.edu) and click the Sign Up link in the upper right corner of the screen.

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

In each of the group areas, there are short videos showing you how to perform different tasks, discussion boards with questions from campus and answers from the experts, and information on upcoming workshops from the Workshops and Training Team.

Please take advantage of the opportunity and become a member of the Mosaic Community.
Getting Around in Analytics

Working with the Home Page

Procedure

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

**Step | Action**
--- | ---
1. | This is the UAccess Analytics **Home** page.

The page is divided into different sections, each of which has a different purpose.
### Training Guide

**UAccess Analytics: Basic Reports and Dashboards**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>The <strong>Create</strong> section contains links which allow you to begin building different Analytics items. To get started, just click the appropriate link.</td>
</tr>
<tr>
<td>3.</td>
<td>In this case, you are creating an analysis (a query). Click the <strong>Analysis</strong> link.</td>
</tr>
</tbody>
</table>

![Image of UAccess Analytics interface](image-url)
Step 4.

Once you click a link in the **Create** section, Analytics will either take you to another screen or, more often, simply open a pop-up window in which you can select a **Subject Area** for your analysis or other item.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>The <strong>Browse/Manage</strong> section contains links to file management screens.</td>
</tr>
<tr>
<td>6.</td>
<td>Choose a folder here to look for content that you want to open or edit. Click the <strong>All Content</strong> link.</td>
</tr>
</tbody>
</table>
Step 7. You can either browse or search for Analyses and other files in the Presentation Catalog.

Click the **Browse Presentation Catalog** link.

**Browse Presentation Catalog**
### Step 8
The **Catalog** includes all of the information in your personal folders and in the Shared Folders that you have access to.

### Step 9
Expand or collapse the folders to view sub-folders within them.

**Note:** Sub-folders are also visible in the pane on the right side of the screen.

Click the + button before **My Folders**.
Step | Action
--- | ---
10. | Click the folder name to see the contents of that folder.

Click the **Upgrade Workshop** link.

Upgrade Workshop
Step | Action
---|---
11. | Now you're looking at the contents of the specific folder.

   Note that there are different types of items here (prompts and Analyses), each of which is represented by a different icon. The icons you see depend on what types of items are in the folder.

12. | You can go back to the **Home** page at any time by simply clicking the link on the Global Header.

Click the **Home** link.
### Step 13

The **Get Started** section contains links to Help documentation, the Mosaic Community (UAccess Analytics Community Forum), the Workshops and Training Team, and the Enterprise Information & Analytics team websites.

<table>
<thead>
<tr>
<th>Step 13</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>The <strong>Get Started</strong> section contains links to Help documentation, the Mosaic Community (UAccess Analytics Community Forum), the Workshops and Training Team, and the Enterprise Information &amp; Analytics team websites.</td>
</tr>
</tbody>
</table>

### Step 14

Take a closer look at the Help documentation.

Click the **Help Contents** link.
15. Click the **UAccess Analytics** link.
Step | Action
---|---
16. | You can navigate through all of the help documentation from this one page.  
   **Note:** *Oracle Business Intelligence Enterprise Edition is the software that drives UAccess Analytics.*

17. | **Note:** Use the browser's built-in find function (typically available by pressing [CTRL+F] on your keyboard) to search for a specific topic.

18. | Click the **Close** button.
19. The bulk of the **Home** page is taken up with two additional sections.

The **Recent** section displays up to six dashboards you've recently accessed, and as many as nine other items you've opened.

Click the appropriate link to navigate directly to the dashboard or other item.
### Step 20

The **Most Popular** section displays as many as six different dashboards that other Analytics users have been using.

**Note:** You will only see those items to which you have been granted access.

### Step 21

That's it for the features of the **Home Page**!

**End of Procedure.**
Working with the Global Header

Procedure

Another great feature in UAccess Analytics is the Global Header.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The <strong>Global Header</strong> (the blue bar across the top of the screen) is present on all screens in UAccess Analytics. The Global Header allows you to navigate within the application from your current screen.</td>
</tr>
<tr>
<td>2.</td>
<td>Some of these Global Header links duplicate other navigation options on the Home page. Choose whichever method you prefer. For instance, the <strong>Catalog</strong> link takes you to the same area of the software you navigate to when you click <strong>All Content &gt; Browse Presentation Catalog</strong> in the <strong>Browse/Manage</strong> section of the Home page. Click the <strong>Catalog</strong> link.</td>
</tr>
</tbody>
</table>
3. The Global Header looks exactly the same on each page even though you are now looking at a different part of Analytics.

4. Click the **Dashboards** link.
Step 5.

All of the dashboards are available through one handy vertical menu, accessible from anywhere in the software.

Click the PELs by Home Department link.

![PELs by Home Department](image-url)
Step | Action
--- | ---
6. | The various dashboards provide access to the Analyses and information you need.
7. | When you need to create a new analysis, you can simply click the **New** link on the Global Header, regardless of where you are in the application.
   
   Click the **New** link.

8. | From the drop-down menu, you can begin the process of creating any of the items on the menu.
9. | If you want to open an already-existing item, use the **Open** menu.
   
   Click the **Open** link.

10. | The **Open** menu includes quick links to Recent and Most Popular items, just like the Home page. You can also click the **Open** folder to navigate to additional items.
11. | The Global Header also includes a **Search** function.
   
   Enter "11g" in the **Search** field.
### Step 12
**Action**

> Click the **Search** button.

---

### Step 13
**Action**

> Analytics locates items that include your search term in the name or description.

> Click the **Open** link.
14. Navigate back to the **Home** page using the Global Header.

Click the **Home** link.

15. You can also manage your account settings from the Global Header by clicking on your name.

Click the **Super Steven Singkofer** link.

16. Click the **My Account** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.</td>
<td>The <strong>My Account</strong> screen has four tabs.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Preferences</strong> tab lets you change a few things, including the landing page you see when you log into Analytics.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Starting Page</strong> drop-down list.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>---------</td>
</tr>
<tr>
<td>18.</td>
<td>You could elect to start on any dashboard page instead of the Home page.</td>
</tr>
<tr>
<td>19.</td>
<td>Click the <strong>Roles and Catalog Groups</strong> tab.</td>
</tr>
</tbody>
</table>

Roles and Catalog Groups
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20.</td>
<td><strong>The Roles and Catalog Groups</strong> tab shows you the roles you've been assigned in UAccess Analytics. Click the OK button.</td>
</tr>
<tr>
<td>21.</td>
<td>That's it for the Global Header. Remember that it is available no matter where you are in Analytics and allows you to readily navigate to any part of the system.</td>
</tr>
</tbody>
</table>

**End of Procedure.**
Review - Home Page and Global Header

**Exercise 1**

1. When logging in to UAccess Analytics, users will typically land on the ________________________.

2. On the Home page, users can see as many as ___________ dashboards they’ve previously accessed.

3. To manage existing Analyses, prompts, and other items, a user may click an appropriate link in the __________________________ section of the Home page.

4. You can also get to a file manager by clicking __________________ on the Global Header.

5. When you need to create a new analysis, you can click the ________________ link on the Global Header.

6. To find a list of the roles you've been assigned, you can click on ________________, then ____________________________.
Working with Analyses

Analytics Data

Where does the data come from?

- The information available in Analytics comes from the data warehouse
- The data warehouse is fed by the source software; e.g., UAccess Financials, UAccess Student, etc.

How is the data organized?

- The data is organized into **Subject Areas**
- Subject Areas contain many **tables** of data
- Each table contains many **columns** of data
- Most columns in Analytics appear because a field exists in the source software
- Some columns in Analytics appear because someone created that column; i.e., calculated columns (e.g., averages, counts, sums)
- Columns within tables may be organized **alphabetically** or by subjective **importance**; the organization of the columns varies with the table
- Tables very often contain **three versions** of many columns, e.g.,
  - Position Code (or ID) – a one-, two-, or three-character alphanumeric code or abbreviation
  - Position – an shorter form of the Description column (10 char)
  - Position Desc – a longer description of the column’s information (30 char)
- Sometimes there are just **two versions** of columns, e.g.,
  - ABOR Code (or ID) – a one-, two-, or three-character alphanumeric code or abbreviation
  - ABOR Code Description – a longer description of the column’s information (30 char)
- **Indicators, Flags, and Current** columns are often Y or N columns, e.g., Disabled Veteran Flag, Works with Animals Flag, or Current Indicator are all Y/N columns

Date Tables

- Date tables for important dates contain many versions of date data
- The one you want will be the **Day Date** column

“Additional” Data Tables

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

Procedure

The process of creating a new analysis in UAccess Analytics is fairly straightforward.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>In this example, you are creating an analysis designed to show you the trends in student enrollment numbers in a particular college and set of majors across several terms. Click the <strong>New</strong> drop-down list.</td>
</tr>
<tr>
<td>2.</td>
<td>A drop-down menu appears, and you could click the <strong>Analysis</strong> link on that menu.</td>
</tr>
</tbody>
</table>
3. Alternatively, if you are on the **Home** page, you could click the **Analysis** link from the **Create** section.

   Click the **Analysis** link.

4. Whichever way you choose, a pop-up screen listing all of the available Subject Areas.

   Click the scrollbar.

5. When you find the Subject Area you wish to use, simply select that Subject Area.

   Click the **CSW - Student Records - Class Enrollment** link.

6. The screen changes and you’re ready to start choosing columns to create your analysis.

   Click the scrollbar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the + button before <strong>Term</strong>.</td>
</tr>
<tr>
<td></td>
<td><img src="image1.jpg" alt="Image" /></td>
</tr>
<tr>
<td>8.</td>
<td>Double-click columns to move them into the <strong>Selected Columns</strong> section of the screen. <strong>Term Description</strong> list item.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the scrollbar.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the + button before <strong>Academic Program</strong>.</td>
</tr>
</tbody>
</table>
11. You can also drag-and-drop columns.
   
   Drag-and-drop the **Academic Program Desc** column into the **Selected Columns** area.
   
   Click the **Academic Program Description** list item and drag it to the desired location.

12. Click the scrollbar.

13. Click the + button before **Term Career Program Plan**.

14. Click the scrollbar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>Double-click the <strong>Primary Major Acad Plan Desc</strong> list item.</td>
</tr>
<tr>
<td>16.</td>
<td>Click the scrollbar.</td>
</tr>
<tr>
<td>17.</td>
<td>Click the + button before <strong>Fact Class Enrollment</strong>.</td>
</tr>
<tr>
<td>18.</td>
<td>Double-click the <strong>Student Enrollment Count</strong> list item.</td>
</tr>
</tbody>
</table>

**End of Procedure.**
Filtering an Analysis

Procedure

You've started the process of creating an analysis. Part of that process is filtering the data to get just what you need.

1. All of the columns of data you need are now in the analysis.

   Use the **Academic Program Desc** column to limit the data to students in your college.

   Click the **Preferences** icon.

2. Click the **Filter** list item.
3. Three elements are required to create a filter through this method.

   1) You need to have already selected the **Column**.
   2) The default **Operator** needs to work for this filter, or you need to change it.
   3) You need to identify one or more **Values**.

4. Click the **Value** drop-down list.

5. This example uses Eller College of Management.

   Click the scrollbar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Choose the Academic Program you want to use for your filter. Click the <strong>Eller College of Management</strong> checkbox.</td>
</tr>
<tr>
<td>7.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>8.</td>
<td>Now filter on the <strong>Primary Major Acad Plan Desc</strong> column to remove students who haven't selected a major. Click the <strong>Preferences</strong> icon.</td>
</tr>
</tbody>
</table>
9. Click the Filter list item.

10. In this instance, you want to make sure that the students have chosen a major. In other words, you want to make sure that there is a value in the Primary Major Academic Plan column.

   You can accomplish this simply by choosing the right **Operator**.

   Click the **Operator** drop-down list.
11. In this operator, the word "null" takes the place of any values.

   Click the **is not null** list item.

12. Click the **OK** button.

13. Sometimes you need to create a filter using a column that is not in your analysis.

   In this case, you need to filter to one or more Academic Years.

   Click the **Filter** icon.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>Click the <strong>More Columns</strong> list item.</td>
</tr>
<tr>
<td>15.</td>
<td>Click the scrollbar.</td>
</tr>
<tr>
<td>16.</td>
<td>Click the + button before <strong>Term</strong>.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 17.  | Use **Academic Year** for this filter.  

**Click the Academic Year** list item.  

[Academic Year]
| 18.  | Click the **OK** button.  

[OK]
| 19.  | You don't always have to select your filter values from a list. If you know exactly what values you need, you may simply type them into the **Value** field.  

Enter "**2011; 2012**" in the **Value** field.  

![UAccess Analytics: Basic Reports and Dashboards](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
| 21.  | Once you have added a filter, you might have to edit it at some point.  
Point to the **Filter** icon. |
### Step 22

The **Edit**, **Copy**, **Paste**, and **Delete** buttons appear when you hover over or click on an existing filter.

### Step 23

Save the analysis.

Click the **Save** icon.
## Step 24
As you save an analysis, you have the option of creating a new folder to organize that analysis.

Click the **New Folder** icon.

![New Folder Icon](image1.png)

## Step 25
Enter "**Basic Workshop**" in the **Name** field.

## Step 26
Click the **OK** button.

## Step 27
Enter "**Student Enrollment**" in the **Name** field.

## Step 28
Enter "**An analysis created to show the changes in student enrollment in a particular college and set of majors across several terms.**" in the **Description** field.

![Dashboard Screenshot](image2.png)
## Step 29
Click the **OK** button.

## Step 30
You have just created a basic analysis.

**End of Procedure.**
Training Guide
UAccess Analytics: Basic Reports and Dashboards

Working with Columns

Procedure

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Results</strong> tab.</td>
</tr>
</tbody>
</table>

Looking at the **Compound Layout** screen on the **Results** tab, you can see the Title view and the Table view. This table shows the four columns that you used to create this analysis.

In the lower-left corner of the screen, you see a **Views** window. Both the Title and Table views are listed in that window.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3.   | You can also preview how the analysis will look when you drop it into a dashboard.  
      | Click the **Preview on Dashboard** icon. |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 4.   | The analysis looks a bit different here, but mostly because the boxes have been removed from around the views.  
      | You should use this **Dashboard Preview** screen to test any and all functionality of your Analyses, rather than testing directly on the Compound Layout screen.  
<pre><code>  | Click the **Close** button. |
</code></pre>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>By default, the table displays just the first 25 rows of data. You can page through the analysis by using the appropriate button at the bottom of the table. You can also expand the table to see all rows of data. Click the <strong>Display More Rows</strong> icon.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the scrollbar.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Now you see 266 rows. Note that the terms are not in time order. They're in alphabetical order. Also note that the Academic Program column doesn't provide any valuable data. It just repeats the College name.</td>
</tr>
<tr>
<td>8.</td>
<td>Click the <strong>First 25 Rows</strong> icon.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>9.</td>
<td>Since the <strong>Academic Program Desc</strong> column does not show much information, remove it from this view. Right-click the <strong>Academic Program Desc</strong> column header.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Exclude column</strong> list item.</td>
</tr>
</tbody>
</table>
### Step 11
The column has been removed from this view but it has not been removed from the analysis.

### Step 12
You can add another column to sort the terms chronologically rather than alphabetically.

Click the **Criteria** tab.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13.  | The **Academic Program Desc** column is still here even though it was removed from the Table view.  
**Note:** Excluding a column from the Table view on the Results tab does not remove that column from the analysis. |
| 14.  | If you want to remove the column from the analysis, you would need to remove it on the **Criteria** tab. |
| 15.  | Add the Term Code so that you can sort chronologically.  
Click the scrollbar. |
| 16.  | Click the + button before **Term**. |
Step | Action
--- | ---
17. | Double-click the **Term Code** list item.  
    | [Term Code]
18. | Move the **Term Code** to the first position.
### Step | Action
---|---
19. | Click the **Results** tab to view the changes.

**Click the Results tab.**
### Step 20

The new column isn't in the table.

If you add a data column to a request from the **Criteria** tab after you have already viewed the results, the column will be excluded from the table view.

### Step 21

A new data column will be excluded from the table view on the **Results** tab if you've added that data column from the **Criteria** tab after having viewed the **Results** tab.

*Note: Review the Editing the Table View tutorial for details on how to add the new column to your Table view.*

### Step 22

Click the **Save** icon.
Step | Action
--- | ---
23. | Once it's been saved, the word Saved with a little green check mark next to it appear next to the **Save** icon.

24. | Those are the basics of excluding and adding columns to a request.

**End of Procedure.**
Editing the Table View

**Procedure**
There are quite a few options for how you arrange your columns in the Table view.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Some unexpected things happen when you add or exclude columns. Editing the Table view may help you grasp why those unexpected things occur.</td>
</tr>
</tbody>
</table>

2. Click the **Edit View** icon.

![Image of UAccess Analytics interface with Table view selected and columns visible]
3. When you edit the Table view, the screen is split into two sections. The usual view of the table, and a **Layout** section at the bottom.

   You can resize the **Layout** section to make things easier to see and work with.

4. Drag-and-drop the **Layout** bar to a higher position on the screen.

   Click the **Layout** object and drag it to the desired location.

5. In the **Layout** screen, you see several different areas:

   - **TablePrompts**
   - **Sections**
   - **Columns and Measures**
   - **Excluded**

   Moving data columns around among those areas allow you to display the data in different ways for different purposes.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 6.   | The **Term Code** and **Academic Program Desc** columns are already in the **Excluded** area.  
You purposely excluded the Academic Program Desc column from the Table view.  
When you added the **Term Code** column from the **Criteria** tab after having viewed the analysis on the **Results** tab, the system dropped the **Term Code** column into the **Excluded** area.  
That's why neither of the columns exist in the Table view, but they are both present on the **Criteria** tab. |
| 7.   | Drag-and-drop the **Term Code** column to the **Columns and Measures** area and drop it to the left of the **Term Description** column.  
Click the **Term** object and drag it to the desired location. |
Step | Action
--- | ---
8. | The reason you added the **Term Code** column to the analysis was to provide a means of ordering the data. That doesn't mean you need to see that column, however. Click the **More options** icon.
Step | Action
--- | ---
9. | Click the Hidden list item.
10. | You can add totals to the Table in various locations.
    | Add totals to the **Columns and Measures** area.
    | Click the **Total** icon.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Click the <strong>After</strong> list item.</td>
</tr>
<tr>
<td>12.</td>
<td>Now drag both of the <strong>Term</strong> columns to the <strong>Table Prompts</strong> area. Drag-and-drop by clicking and dragging the <strong>Term</strong> table header. This will create a separate page for each of the different terms in the list. Click the <strong>Term</strong> table and drag it to the desired location.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>13.</td>
<td>Notice the drop-down menu at the top of the table that allows you to choose a term to display.</td>
</tr>
<tr>
<td>14.</td>
<td>You can add totals to the <strong>Table Prompts</strong> area, too. Click the <strong>Total</strong> icon.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>15.</td>
<td>Click the <strong>After</strong> list item.</td>
</tr>
</tbody>
</table>
| 16.  | Take a look to see what you've created.  
Click the **Term Description** drop-down list. |
17. This analysis is filtered to the 2011 and 2012 academic years. The items you see in the drop-down menu are the terms that make up the two academic years. Also note that the terms are in the proper sequential order.

The All Values item at the bottom of the menu is the total that you just added to the Table Prompts area.

18. You're done editing the Table view.

Click the Done button.
### Step 19
Any users of this analysis will be able to select the term they wish to see.

One thing that's missing, however, is a **Filters View**.

### Step 20
**Click the New View** icon.

### Step 21
**Click the Filters** list item.
Step | Action
--- | ---
22. | The Filters view has been added to the bottom of the analysis.
23. | Click the **Save** icon.
24. | That's how you edit your columns display in a Table view.

*End of Procedure.*
Exercise - Creating a New Analysis

Exercise 1

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

1. Create the analysis using the HCM - Employee Profile Subject Area.

2. Add these columns:
   - Department > College Name for Job Department
   - Measures > Counts > Employee Headcount
   - Measures > Counts > Employee FTE - Total

3. Add a filter to limit the data to just the various colleges on all campuses. In other words, do not include any auxiliary departments. You should end up with approximately 19 rows of data in your analysis.

4. Order the information properly.

5. Edit the Column Properties and format the data such that the numbers are displayed with two decimal places in each numeric column.

6. Look at the Results.
   a. How many rows of data are present in your analysis?

7. Add a Filters View.

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

<table>
<thead>
<tr>
<th>College Name for Job Department</th>
<th>Employee Headcount</th>
<th>Employee FTE - Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicine - Tucson</td>
<td>2,959.00</td>
<td>2,462.43</td>
</tr>
<tr>
<td>Science</td>
<td>2,956.00</td>
<td>1,954.25</td>
</tr>
<tr>
<td>Agriculture/Life Sciences</td>
<td>1,715.00</td>
<td>1,183.99</td>
</tr>
<tr>
<td>Social/Behavioral Sciences</td>
<td>1,001.00</td>
<td>637.84</td>
</tr>
<tr>
<td>Engineering</td>
<td>875.00</td>
<td>482.63</td>
</tr>
<tr>
<td>Humanities</td>
<td>841.00</td>
<td>495.65</td>
</tr>
<tr>
<td>Eller College of Management</td>
<td>610.00</td>
<td>353.74</td>
</tr>
<tr>
<td>Fine Arts</td>
<td>562.00</td>
<td>254.80</td>
</tr>
<tr>
<td>Education</td>
<td>398.00</td>
<td>213.71</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>348.00</td>
<td>251.18</td>
</tr>
<tr>
<td>Optical Sciences</td>
<td>335.00</td>
<td>222.59</td>
</tr>
<tr>
<td>Medicine - Phoenix</td>
<td>293.00</td>
<td>158.09</td>
</tr>
<tr>
<td>Architecture/Landscape Archite</td>
<td>183.00</td>
<td>88.70</td>
</tr>
<tr>
<td>James E Rodgers College of Law</td>
<td>169.00</td>
<td>116.31</td>
</tr>
<tr>
<td>Nursing</td>
<td>169.00</td>
<td>122.03</td>
</tr>
<tr>
<td>University of Arizona South</td>
<td>145.00</td>
<td>79.01</td>
</tr>
<tr>
<td>Graduate College</td>
<td>137.00</td>
<td>63.76</td>
</tr>
<tr>
<td>UA Outreach College</td>
<td>79.00</td>
<td>25.56</td>
</tr>
<tr>
<td>International Affairs</td>
<td>48.00</td>
<td>35.03</td>
</tr>
<tr>
<td>Honors College</td>
<td>34.00</td>
<td>22.19</td>
</tr>
</tbody>
</table>

College Name for Job Department is equal to Agriculture/Life Sciences, Architecture/Landscape Archite, Colleges of Letters, Arts/Sci, Education, Eller College of Management, Engineering, Fine Arts, Graduate College, Honors College, Humanities, International Affairs, James E Rodgers College of Law, Medicine - Phoenix, Medicine - Tucson, Nursing, Optical Sciences, Pharmacy, Science, Social/Behavioral Sciences, UA Outreach College, University, University of Arizona South
Adding a Graph

Procedure

Adding a **graph** to the analysis will help viewers get a better idea of whatever trends are occurring.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Add a new view by using the buttons in the <strong>Views</strong> window. &lt;br&gt;Click the <strong>New View</strong> icon.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Graph</strong> list item.</td>
</tr>
</tbody>
</table>
Step 3.

Seeing trends is easiest with line graphs.

Click the **Line** list item.
4. The graph is created automatically, based on the data and types of data you've included in the original analysis.

You must often make modifications to the graph in order to present the data in a better way.

5. This screen is split into two sections just like other screens in the software.

Columns of data can be moved around in the Layout window, which will allow you to display the data as you wish to see it.

6. Scroll down in the Layout window so you can see all of the sections.

Click the scrollbar.

7. By default, any counts or other numeric-value columns will fall into the Measures section.

All other columns will fall into the Line section.
### Step 8

**What you are trying to graph is the total number of enrolled students per term.**

What is currently graphed is the number of enrolled students in each Academic Program and Major Plan per term.

You have to exclude some columns.

### Step 9

Drag-and-drop the **Academic Program Desc** column from the Lines area into the **Excluded** area.

Click the **Academic Program Desc** object and drag it to the desired location.

### Step 10

Drag-and-drop the **Primary Major Acad Plan Desc** column into the **Excluded** area.

Click the **Primary Major Acad Plan Desc** object and drag it to the desired location.
11. There are a few additional minor modifications you can make. Click the **Properties** icon.

12. The **Canvas Width** and **Canvas Height** fields only accept pixel values. The graph size cannot be adjusted by percentage. There are **Zoom and Scroll** features here, too.

13. Click the **Enable for Horizontal Axis** checkbox.

14. Click the **Enable for Vertical Axis** checkbox.

15. Click the **Titles and Labels** tab.

16. The **Graph Title** isn't necessary. Click the **Use measure name as graph title** checkbox.
17. You can simplify both the Vertical Axis and Horizontal Axis Titles. Start with the **Vertical Axis Title**.

   Click the **Use measure name as axis title** checkbox.✓

18. Enter "**Student Count**" in the **Vertical Axis Title** field.

19. Now the **Horizontal Axis Title**.

   Click the **Use column name as axis title** checkbox.✓

20. Enter "**Term**" in the **Horizontal Axis Title** field.

21. Click the **OK** button.✓
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.</td>
<td>Click the <strong>Done</strong> button.</td>
</tr>
</tbody>
</table>

**Done**
23. When you add a new view using the buttons in the small **Views** window, the view isn't automatically added to the analysis. You must add it manually.

24. The **Graph** view is highlighted in the **Views** window.
   
   Click the **Add View** button.

25. New views are always added at the bottom of the analysis.
   
   Click the scrollbar.
### Step 26
Now that the graph appears, move it to a new location to make it more visible.

### Step 27
Drag-and-drop the graph and put it just to the right of the table.

Click the **Graph** object and drag it to the desired location.
28. When you see the dark blue line touching the right side of the table, you have the graph in the right position.

Release the mouse button.
29. The graph is now located in a great spot.

Now test the **Zoom and Scroll** function that you enabled.

30. Point to the list item.

31. The **Zoom and Scroll** button doesn't appear until you hover over one of the axes in the graph. Once it appears, you can click the button.

   Click the **Zoom and Scroll** icon.

32. **Click the Vertical Axis** list item.

   ![Vertical Axis icon]
Step 33. Click the **Zoom In** list item.

**Zoom In**
Step | Action
--- | ---
34. | When you activate the **Zoom and Scroll** feature on a graph, the system drops a scroll bar onto the appropriate graph axis.
35. | Click the **Down** button of the scrollbar.
36. Click the **Up** button of the scrollbar.
37. Now, turn off the **Zoom and Scroll**.

Click the **Zoom and Scroll** icon.
38. Click the **Actual Size** list item.

39. The graph could be taller. Edit the graph.

   Click the **Edit View** icon.
Step 40.

Click the Properties icon.
### Step 41.
Change the **Canvas Height** of the graph.

Enter "500" in the **Canvas Height** field.

### Step 42.
Click the **OK** button.

### Step 43.
Click the **Done** button.
44. That looks great!

Click the **Save As** icon.

45. Enter "**Student Enrollment - Graphed**" in the field.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>46.</td>
<td>Click the OK button.</td>
</tr>
</tbody>
</table>
Exercise - Adding a New View

Exercise 2

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

1. **Open** the analysis you created in Exercise 2.

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

3. **Edit** the **graph properties**:
   a. Increase the height of the graph to **400 pixels**.
   b. Move the **legend** and put it above the graph.
   c. Remove the **graph title**.
   d. Modify the **vertical axis title** to read "**Colleges**."
   e. Modify the **horizontal axis title** to read "**Counts**."
   f. Click **Done**.

4. **Move** the Graph View to the right side of the Table View.

5. **Save** the modified analysis in your **Basic Workshop** folder as **College Employee Headcount/FTE Comparison - Graphed**.
### College Employee Headcount/FTE Position Count Comparison - Graphed

<table>
<thead>
<tr>
<th>College Name for Sub Department</th>
<th>Employee Headcount</th>
<th>Employee FTE - Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicine - Tucson</td>
<td>2,659.00</td>
<td>2,462.43</td>
</tr>
<tr>
<td>Science</td>
<td>2,956.00</td>
<td>1,954.25</td>
</tr>
<tr>
<td>Agriculture/Life Sciences</td>
<td>1,715.00</td>
<td>1,183.99</td>
</tr>
<tr>
<td>Social/Behavioral Sciences</td>
<td>1,001.00</td>
<td>637.84</td>
</tr>
<tr>
<td>Engineering</td>
<td>875.00</td>
<td>482.63</td>
</tr>
<tr>
<td>Humanities</td>
<td>841.00</td>
<td>495.85</td>
</tr>
<tr>
<td>Eller College of Management</td>
<td>610.00</td>
<td>352.74</td>
</tr>
<tr>
<td>Fine Arts</td>
<td>562.00</td>
<td>254.80</td>
</tr>
<tr>
<td>Education</td>
<td>298.00</td>
<td>212.71</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>348.00</td>
<td>251.18</td>
</tr>
<tr>
<td>Optical Sciences</td>
<td>335.00</td>
<td>222.59</td>
</tr>
<tr>
<td>Medicine - Phoenix</td>
<td>293.00</td>
<td>156.99</td>
</tr>
<tr>
<td>Architecture/Landscape Architecture</td>
<td>183.00</td>
<td>88.70</td>
</tr>
<tr>
<td>James E. Rogers College of Law</td>
<td>169.00</td>
<td>116.31</td>
</tr>
<tr>
<td>Nursing</td>
<td>169.00</td>
<td>122.03</td>
</tr>
<tr>
<td>University of Arizona South</td>
<td>146.00</td>
<td>79.01</td>
</tr>
<tr>
<td>Graduate College</td>
<td>157.00</td>
<td>63.76</td>
</tr>
<tr>
<td>UA Outreach College</td>
<td>79.00</td>
<td>25.56</td>
</tr>
<tr>
<td>International Affairs</td>
<td>48.00</td>
<td>35.03</td>
</tr>
<tr>
<td>Honors College</td>
<td>34.00</td>
<td>22.19</td>
</tr>
</tbody>
</table>

![Graph showing the comparison between employee headcount and FTE totals across various college departments.](image)
## Working with Dashboards

### Creating a New Dashboard

**Procedure**

You've created the Analyses and the prompt. It's time to put it all together on a new dashboard page.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1. | Start the process on the Global Header.  
Click the **Dashboards** drop-down list. |
| 2. | Create the new page on your own personal dashboard.  
Click the **My Dashboard** list item. |
Step | Action
--- | ---
3. | It doesn't matter if you already have multiple pages or an empty dashboard.

Create a new page.

Click the **Page Options** icon.
4. Click the **Edit Dashboard** list item.

![Edit Dashboard]

5. Click the **Add Dashboard Page** icon.

![Add Dashboard Page]

6. Enter "**Basic Workshop**" in the **Page Name** field.

7. Enter "**This page was created during the UAccess Analytics: Basic Workshop.**" in the **Page Description** field.
8. Click the **OK** button.
9. When you create a new dashboard page, that page is completely empty.

Begin by adding sections from the **Dashboard Objects** pane on the left.
### Step 10

Drag a **Section** object into the empty dashboard. 

Click the **Subject** object and drag it to the desired location.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Dag a second Section into the dashboard and drop it below the first Section. Click the Subject object and drag it to the desired location.</td>
</tr>
<tr>
<td>12.</td>
<td>Now that you have the basic layout in place, add your Analyses. Your Analyses live in the My Folders folder in the Catalog pane. Expand My Folders. Click the + button before My Folders.</td>
</tr>
<tr>
<td>13.</td>
<td>Now expand the Basic Workshops folder. Click the + button before Basic Workshop.</td>
</tr>
</tbody>
</table>
### Step 14

Begin by dragging the **Student Enrollment - Graphed** analysis into **Section 2**.
Step | Action
--- | ---
15. | Now drag the other three Analyses into **Section 1**.
   
   Click the **Student Enrollment** analysis and drag it to the desired location.

16. | Continue with the College Employee Headcount/FTE Comparison analysis.
   
   Drop that analysis below the **Student Enrollment** analysis. You'll know you have it in the right location when you see the dark blue bar inside **Section 1** and below the first analysis.
   
   Release the mouse button.

17. | Continue dragging-and-dropping with the remaining Analyses.

18. | Once you have all four remaining Analyses in **Section 1**, you can see that they are arranged vertically. You want them arranged horizontally.
   
   Hover your mouse over the upper-right corner of **Section 1** to see the section buttons.
   
   Point to the desired location.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>19.</td>
<td>The greyed-out button is arranging the Analyses vertically. It's the <strong>Vertical Layout</strong> button. Click the <strong>Horizontal Layout</strong> icon.</td>
</tr>
<tr>
<td>20.</td>
<td>Now the four Analyses in <strong>Section 1</strong> are arranged horizontally.</td>
</tr>
<tr>
<td>21.</td>
<td>Make some modifications to <strong>Section 1</strong>. Click the <strong>Properties</strong> icon.</td>
</tr>
<tr>
<td>22.</td>
<td>There are a number of options here, which will help you make several changes. First, rename the section, then add the <strong>Section Header</strong> and the <strong>Section Title</strong>. Finally, format the section. Each time you make a change, click the <strong>Section Properties</strong> button.</td>
</tr>
<tr>
<td>23.</td>
<td>Click the <strong>Rename</strong> link. Rename...</td>
</tr>
<tr>
<td>24.</td>
<td>Enter &quot;<strong>Additional Analyses</strong>&quot; in the field.</td>
</tr>
<tr>
<td>25.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>26.</td>
<td>Click the <strong>Properties</strong> icon.</td>
</tr>
<tr>
<td>27.</td>
<td>Click the <strong>Show Section Header</strong> link.</td>
</tr>
<tr>
<td>28.</td>
<td>Click the <strong>Properties</strong> icon.</td>
</tr>
<tr>
<td>29.</td>
<td>Click the <strong>Show Section Title</strong> link.</td>
</tr>
<tr>
<td>30.</td>
<td>Click the <strong>Properties</strong> icon.</td>
</tr>
<tr>
<td>31.</td>
<td>Click the <strong>Format Section</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 32.  | When you format the section, you simply want to remove the borders.  
     |
|      | Click the **Border Position** drop-down list.  
|      | [ ] |
| 33.  | Click the **None** list item.  
|      | None |
| 34.  | Click the **OK** button.  
|      | OK |
| 35.  | Now format **Section 2**.  
|      | Click the **Properties** icon.  
|      | [ ] |
| 36.  | For **Section 2**, just turn on the **Section Header**.  
|      | Click the **Show Section Header** link.  
|      | Show Section Header |
| 37.  | Save the dashboard.  
|      | Click the **Save** button.  
|      | [ ] |
| 38.  | You've made a number of changes. You can preview the dashboard to see how you're doing.  
|      | Click the **Preview** link.  
|      | Preview |
| 39.  | That's not quite right. Those three Analyses in the top section are supposed to be links. You have more work to do.  
|      | Click the **Close** button.  
|      | [ ] |
| 40.  | Make adjustments to the three Analyses in **Section 1** to make them appear as links rather than displaying the Analyses directly on the dashboard.  
|      | Start with the **Student Enrollment** analysis.  
|      | Click the **Properties** icon.  
|      | [ ] |
| 41.  | Click the **Display Results** link.  
<p>|      | Display Results |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>42.</td>
<td>Click the <strong>Link - In a Separate Window</strong> link.</td>
</tr>
<tr>
<td>43.</td>
<td>Continue with the next analysis. Click the <strong>Properties</strong> icon.</td>
</tr>
<tr>
<td>44.</td>
<td>Click the <strong>Display Results</strong> link.</td>
</tr>
<tr>
<td>45.</td>
<td>Click the <strong>Link - In a Separate Window</strong> link.</td>
</tr>
<tr>
<td>46.</td>
<td>Make the same changes to the remaining Analyses in <strong>Section 1</strong>. Once you have made the changes to all four Analyses, save your dashboard and take another look. Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>47.</td>
<td>Click the <strong>Preview</strong> link.</td>
</tr>
<tr>
<td>48.</td>
<td>The four Analyses no longer appear in the preview screen. In fact, they don't appear at all! Don't worry. The preview screen doesn't necessarily show you exactly how the dashboard will look, but you will get a good idea. Links, which is what you've created, tend not to show. Click the <strong>Close</strong> button.</td>
</tr>
<tr>
<td>49.</td>
<td>Click the <strong>Run</strong> link.</td>
</tr>
<tr>
<td>50.</td>
<td>Your dashboard is complete. The three Analyses in the <strong>Additional Analyses</strong> section are displayed as links, and the reports can be displayed by clicking those links. The analysis in the bottom section is displayed directly on the screen, as desired.</td>
</tr>
</tbody>
</table>
Working with Dashboard Functionality

**Procedure**

Now that your dashboard page is finished, look at some functionality.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Open one of the additional Analyses. Click the <strong>Student Enrollment</strong> link.</td>
</tr>
</tbody>
</table>

![Image of Student Enrollment](image_url)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Data can be manipulated on any analysis on any dashboard in many different ways. Exclude columns first, move any remaining columns as needed, then apply sorting. If you sort then move, you'll lose your sorting.</td>
</tr>
</tbody>
</table>
3. Click the **Sort Ascending** icon.

   ![Image](image1.png)

4. The counts are ordered from lowest to highest.

   Click the **Sort Descending** icon.

5. Now they're ordered from highest to lowest.

   Right-click the **Student Enrollment Count** column header.

   ![Image](image2.png)

6. There are other sorting options, too.

   Click the **Sort layer** list item.

   ![Image](image3.png)
Step | Action
--- | ---
7. | Use the right-click **Sort layer** menu to sort ascending or descending, or to layer sorting by multiple columns.
8. | You also have the option to clear any applied sorting.

Click the **Clear All Sorts in View** list item.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>Right-click the <strong>Student Enrollment Count</strong> column header.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Student Enrollment Count" /></td>
</tr>
<tr>
<td>10.</td>
<td>There are other options available on the right-click menu.</td>
</tr>
<tr>
<td></td>
<td>One option gives users the ability to exclude columns.</td>
</tr>
<tr>
<td></td>
<td>Another option is to move columns.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>Move</strong> list item.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Move" /></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 12.  | Users can move columns to the right or left, as appropriate, or can move them to either the **Table Prompts** or **Section** areas above the table.  

**Note:** This analysis already has the **Term Description** column in the **Table Prompts** area.  

13. | You can also drag columns from the **Table Prompts** or **Sections** areas back into the analysis.  

Click the **Term Description** object and drag it to the desired location.  

14. | The light blue bar shows you where the column will drop in. |
Step 15. The **Term** column is now in the analysis.

Click the **Return** link.
16. If you've made changes that you wish to maintain, the next step is to save.

Click the **Page Options** icon.

17. Click the **Save Current Customization** list item.

18. Enter "Workshop" in the **Name** field.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 19.  | Use this setting to make this customization your default by clicking the checkbox.  
     | Click the **OK** button. |
| 20.  | Clear the customizations, then reapply them to see how that functions.  
     | Click the **Page Options** icon. |
Step 21. Click the **Clear My Customization** list item.
Step | Action
--- | ---
22. | The page has refreshed to its original state. Click the **Page Options** icon.
23. **Click the Apply Saved Customization list item.**

   Apply Saved Customization
Step 24. Click the Workshop list item.
Step 25. Your customizations have been applied.

Step 26. Those are the basics of working in a dashboard!

End of Procedure.
Review - Working with Dashboards

Exercise 4

1. In order to preserve any customized sorting orders, you should sort your columns first, then move them.  **True**  **False**

2. You can create as many customized views of a dashboard page as you wish.  **True**  **False**

3. Once you **Exclude** a column, how can you add it back into the analysis?

4. The Table Prompts section will create a different smaller section report for each value in the column.  **True**  **False**

5. This was fun.  **True**  **Yes**
Appendix A

Adding a Pivot Table

Procedure

Pivot Tables are very useful ways of displaying counts of data by multiple characteristics.

For instance, Pivot Tables allow you to answer requests like "show me how many students are in each of these ten majors broken out by academic level" and "show me the distribution of faculty in my college by department, rank, ethnicity, and gender."

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>In this tutorial, you are adding a Pivot Table to this analysis. Click the <strong>New View</strong> icon.</td>
</tr>
</tbody>
</table>

---

Page 122
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Pivot Table</strong> list item.</td>
</tr>
</tbody>
</table>

![Diagram of UAccess Analytics: Basic Reports and Dashboards](image-url)


<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>The Pivot Table is automatically added, but it includes all of the columns which means you have to edit.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Edit View</strong> icon.</td>
</tr>
</tbody>
</table>
5. The first thing you need to do is to exclude the **Academic Program Desc** column.

   Drag-and-drop it into the **Excluded** area.

   Click the **Academic Program Desc** object and drag it to the desired location.

6. Now move both of the **Term** columns into the **Columns** area.

   Click the **Term** object and drag it to the desired location.

7. The **Term Code** column is doing its job of ordering the information, but you don't need to see it, so hide it.

   Click the **More options** icon.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Click the <strong>Hidden</strong> list item.</td>
</tr>
</tbody>
</table>
| 9.   | Now move the **Measure Labels** item into the **Excluded** area.  

Click the **Measure Labels** object and drag it to the desired location. |
<p>| 10.  | You need a Grand Total of all the rows in this analysis, but you have an option here you didn't have before. |
|      | Click the <strong>Total</strong> icon. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Click the <strong>Before</strong> list item.</td>
</tr>
<tr>
<td>12.</td>
<td>Take a look at what the data looks like. Click the <strong>Done</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>13.</td>
<td>When you add a new view, that view is always at the bottom of the analysis. Click the scrollbar.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>14.</td>
<td>Counts of students are displayed for each major in each term. The Grand Totals are located at the top, so users can see the totals, but can also access the detail numbers, if desired. The Pivot Table only displays the first 25 rows by default.</td>
</tr>
<tr>
<td>15.</td>
<td>Delete the Table View. Scroll back up to the top of the analysis, then click the <strong>Delete</strong> button on the Table view. Click the scrollbar.</td>
</tr>
<tr>
<td>16.</td>
<td>Click the <strong>Delete</strong> icon.</td>
</tr>
<tr>
<td>17.</td>
<td>The Table view still exists in the analysis. Removing from the <strong>Compound Layout</strong> screen is the equivalent of putting it in your desk drawer. You still have it, but you can't see it on your desktop. If you look in the <strong>View</strong> window, you'll see the Table there. Click the <strong>Table</strong> list item.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>18.</td>
<td>Click the <strong>Remove View from Analysis</strong> icon.</td>
</tr>
<tr>
<td>19.</td>
<td>The Table view has been completely removed from this analysis.</td>
</tr>
<tr>
<td>20.</td>
<td>Now move the Pivot Table above the Filters view. Click the <strong>Pivot Table</strong> object and drag it to the desired location.</td>
</tr>
<tr>
<td>21.</td>
<td>Save the analysis, but give it a new name. Click the <strong>Save As</strong> button.</td>
</tr>
<tr>
<td>22.</td>
<td>Enter &quot;<strong>Student Enrollment - Pivot Table</strong>&quot; in the field.</td>
</tr>
</tbody>
</table>

![Image](image.png)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>23.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>24.</td>
<td>You've added a basic Pivot Table to your analysis and edited it. Nice work!</td>
</tr>
</tbody>
</table>

**End of Procedure.**
Index

Add Dashboard Page .................... 95
All Values ................................ 65
Apply Saved Customization .......... 115
Browse/Manage ......................... 4, 15
Catalog .................................. 5, 6, 15, 99
Clear My Customization .............. 113
Column Properties ...................... 69
Columns and Measures ............... 58
Compound Layout ...................... 47, 48, 128
Create .................................. 2
Criteria ................................. 51, 52, 55, 59
Dashboard Objects ...................... 97
Dashboards ......i, ii, v, 16, 17, 93, 119
drag-and-drop ......................... 32
Edit Dashboard ......................... 95
Edit View .............................. 57, 86, 123
Exclude column ......................... 50
Excluded ............................ 58, 59, 74, 124, 125
Filter .................................. 35, 38, 39, 42
Filtering ................................ 35
Filters View .......................... 66, 69
Get Started ............................. 9
Global Header..... 8, 15, 16, 18, 20, 23,
25, 93
Graph ................................. 71, 75, 78, 79, 91
Hidden ................................ 61, 125
Home 1, 8, 12, 13, 15, 17, 18, 20, 22,
25, 27, 30
Home Page ......................... 1, 13, 25
Layout ................................. 58, 73, 102
Measure Labels ......................... 125
Measures ............................. 59, 61, 69, 73
Most Popular ......................... 13, 18
Move .................................. 53, 91, 108
My Account .......................... 20, 21
My Dashboard ......................... 93
New..... 18, 29, 44, 66, 69, 78, 91, 93, 121
New View ............................. 71
Open ................................. 18, 19, 91, 105
Operator .............................. 36, 38
Order .................................. 69, See Sort
Page Options ........................ 94, 111, 112, 114
Pivot Table .... 121, 122, 123, 128, 129
Preview on Dashboard ............... 48
Recent ............................... 12, 18
Results ... 47, 52, 54, 55, 59, 69, 103, 104
Roles and Catalog Groups ........... 22
Save ............................. 43, 55, 56, 67, 69, 91, 103, 104, 129
Save As ............................. 89
Save Current Customization ....... 111
Search ............................... 18, 19
Section ... 98, 99, 100, 101, 102, 103, 104, 109
Sections .............................. 58
Selected Columns ..................... 31, 32
Sort .......................... 106, 107, See Order
Starting Page ....................... 21
Subject Area ......................... 3, 30, 69
Table Prompts 58, 62, 63, 65, 109, 119
Total ............................ 61, 63, 69, 125
Value ............................. 36, 41
Views .............................. 47, 71, 78