

UAccess ANALYTICS

Next Steps: Constructing and
Deconstructing View Selectors

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Training Guide

Next Steps: View Selectors



About this Booklet

This UAccess Analytics booklet is designed to help you become familiar with creating and deconstructing View Selectors. For more information, refer to the appropriate sections of the UAccess Analytics online Help documentation. Use your browser search function and search for View Selector. You can also click the Help button on the Edit View Selector screen.

This booklet is generic by necessity, but will provide you with the information you need to construct and deconstruct View Selectors.

For information on workshops in which you can learn how to build basic analyses and dashboards, as well as other brown bag demonstrations, please go to the Workshops and Training Team website at <http://workshops.arizona.edu>.

Access to Analytics Data

Request for Individual access to UAccess Analytics can be submitted to <https://request.uaccess.arizona.edu>.

UAccess Community

The UAccess Community is an online networking resource available to everyone on campus who use UAccess systems.

If you have an official UA email address, you can request membership in the UAccess Community. Just go to <http://community.uaccess.arizona.edu> and click the Sign Up link in the upper right corner of the screen.

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

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

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

Prerequisites

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

If you haven't created analyses of your own, you should certainly be familiar with the process.

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

You should also be familiar with creating different views of data in your analyses. Those different views might be tables, graphs, pivot tables, or other views.

What is a View Selector?

A View Selector is a drop-down list from which users can select a specific view of the results of an analysis from among the saved views.

A View Selector effectively layers views such as tables, graphs, or pivot tables on top of one another so that the analysis takes up less space on a dashboard. Access to the individual views is through the drop-down menu mentioned above.

A View Selector also gives control of the analysis to the user. The user can select which view(s) they wish to see as they need them, rather than having to scroll through a very long report to see all of the different possible views.

Overview

There are just a few basic steps you need to accomplish to get your analysis working with a view selector. Of course, there are many, many intermediate steps, but it's helpful to start with a quick outline.

1. Edit the analysis to rename existing views and remove any unneeded views.
2. Create the View Selector and add it to the analysis.
3. Remove any views you've added to the View Selector from the Compound Layout.

Premise

You've Already Created Your Analysis*

You have created a very useful analysis showing two pivot tables and a graph. Each of those items is called a view.

The top pivot table is a summary view of departmental Purchasing Card (PCard) transactions from the previous month.

The table is a graphic representation of the same summary data.

The pivot table at the bottom provides transaction-by-transaction detail of those same charges.

Once you put the analysis on your department dashboard, you realize that a) it takes up a lot of space, and b) not everyone who views the analysis needs to see all three views. In fact, most people view just one view and ignore the other two, with each person having their own particular favorite.

There's not much point in having all three views visible for everyone all the time. It's at this point that you realize you could add a View Selector to the analysis and let the user select the particular view they prefer as they run the analysis.

* This analysis, including the top pivot table and the graph, is one we create in the Intermediate Reports and Dashboards workshop.

Departmental PCard Analysis
for FEB, 2014

Account No	PCard No	Cardholder	Monthly Spend Limit	Monthly Trans Limit	Transaction Total	Percent	Transaction Count
1142110	5653	BEGAY, BERNARD	30000	150	4,469.93	24.4%	12
1144020	9662	ROMAN, PAMELA	15000	999	302.07	1.6%	3
1144030	9691	COMPUTING, STUDENT	35000	300	290.67	1.6%	2
1144050	9149	COOLEY, MELANIE	3000	30	39.28	0.2%	2
1192600	1129	CATTEN, DEBRA	50000	400	1,667.18	9.1%	9
	2107	LLOYD, CARLA	50000	300	6,537.31	35.7%	9
	3815	GOMEZ, IRMA	15000	50	2,560.34	14.0%	3
	5766	LARSON, SHAWNA	50000	250	1,955.55	10.7%	11
	8033	SWANSON, SARAH	50000	200	97.13	0.5%	1
1645000	3765	VILLALOBOS, MIRIAM I	50000	400	89.25	0.5%	1
	7770	PEREZ, EVANGELINA	50000	400	303.79	1.7%	2
Grand Total					18,312.50	100.0%	55

Organization Name: All Values

Organization Name	Account No	PCard No	Cardholder	Post Date	Vendor Name	Sales Tax	Transaction Amount					
Ofc: Stndt Computing Resources	1142110	5653	BEGAY, BERNARD	02/03/2014	VWY GRAINGER	12.12	248.26					
				02/07/2014	AMAZON MKTPLACE PMTS	0.00	249.00					
					WWW.NEWEGG.COM	0.00	674.73					
				02/11/2014	amazon.com	1.92	25.94					
				02/19/2014	UOFA BOOKSTORE	29.28	506.28					
				02/20/2014	UNIVERSITY POSTAL	0.00	27.01					
				02/21/2014	TELESTREAM INC	0.00	2,624.00					
				02/26/2014	UOFA BOOKSTORE	-3.67	-63.79					
				02/26/2014	MONOPRICE INC	0.00	22.78					
				02/27/2014	RAKUTEN.COM*BUY.COM	0.00	104.22					
				02/27/2014	OFFICE MAX	42.06	561.30					
				02/28/2014	HOMEDEPOT.COM	5.50	73.44					
				5653 Total							87.21	5,055.27
				1142110 Total							87.21	5,055.27
				1144030	9691	COMPUTING, STUDENT	02/03/2014	DRIV*VMWARE	0.00	186.96		
02/06/2014	GIBSONS OFFICE SUPPLY	7.77	103.71									
9691 Total							7.77	290.67				
1144030 Total							7.77	290.67				
1144050	9149	COOLEY, MELANIE	02/07/2014	CTC*CONSTANTCONTACT.COM	0.00	1.44						
			02/18/2014	CTC	2.84	37.84						
9149 Total							2.84	39.28				
1144050 Total							2.84	39.28				
Ofc: Stndt Computing Resources Total							97.82	5,385.22				
Ofc of the Chief Info Officer	1192600	1129	CATTEN, DEBRA	02/07/2014	AMERICAN AIRLINES	0.00	421.00					
				02/11/2014	SUPERSHUTTLE EXECUCARLAX	0.00	18.88					
				02/12/2014	UNITED AIRLINES	0.00	514.00					
				02/18/2014	AMAZON MKTPLACE PMTS	0.00	247.96					
				02/19/2014	SUPERSHUTTLE EXECUCARSFO	0.00	37.76					
				02/21/2014	SOUTHWEST	0.00	502.00					
				02/24/2014	SUPERSHUTTLE EXECUCARDIA	0.00	47.20					
				02/28/2014	SUPERSHUTTLE EXECUCARDIA	0.00	2.36					
				1129 Total							0.00	1,791.16
				1192600 Total							0.00	1,791.16
Ofc of the Chief Info Officer Total							0.00	1,791.16				
Univ Tech Svcs Admin	1144020	9662	ROMAN, PAMELA	02/12/2014	DRIV*VMWARE	0.00	59.99					
				9662 Total							0.00	59.99
1144020 Total							0.00	59.99				

Rows 1 - 25
Analysis contains no Selection Steps

College Name is equal to CHIEF INFORMATION OFFICER DIVISION, Chief Information Officer Div
or Organization-Code is equal to 9305, 9501
and Post Date is between TIMESTAMP '2014-02-01 00:00:00' and TIMESTAMP '2014-02-28 00:00:00'

Prepping the Analysis for a View Selector

If you were to add this analysis to a dashboard page as it is currently formatted, it would fill the entire page. As previously mentioned, not all users need to see all of the available views all of the time. Those who do would have to scroll down to find and see the views at the bottom of the screen. You'd also be using up valuable real estate that could be put to better use displaying another report.

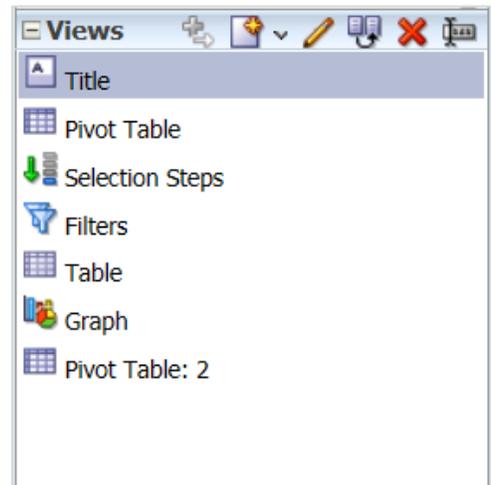
A View Selector effectively layers two or more views on top of each other and allows the user to select which view they wish to see at any particular time using a drop-down menu. There are some steps you'll want to take to prepare and clean up the analysis before you add the View Selector.

Renaming the Existing Views

The View Selector uses the names of the views that you see in the **Views** pane. Those names should be more descriptive of what the user will actually see.

Procedure

1. **Edit** the analysis and navigate to the **Results** tab. Locate the **Views** pane in the lower-left corner of the screen.
2. **Select** Pivot Table and determine your new name for this view.
3. **Click** the **Rename View** button  in the upper-right corner of the Views pane.
4. **Enter** the new name for the pivot table view. Click **OK**.
5. Repeat steps 3-5 for the **Graph** and **Pivot Table:2** views.



Deleting Unwanted or Unneeded Views

This is also a good time to remove any unwanted or unnecessary views. If you later determine that you do need a deleted view, you can simply recreate it.

Procedure

1. **Select** the **Table** view in the Views pane.
2. Click the **Remove View from Analysis** button  to permanently delete the unneeded Table view.

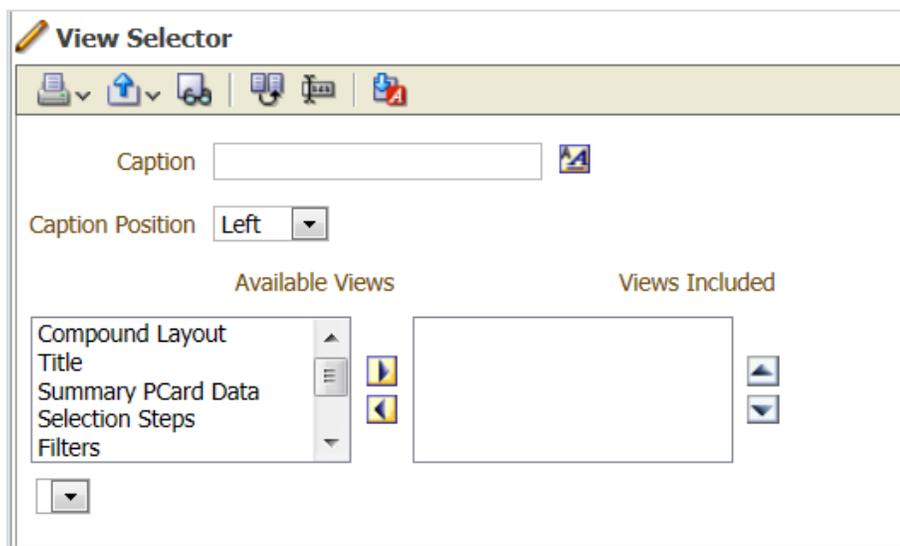
Constructing the View Selector

Creating the View Selector

Now that you've renamed the views you're going to be using in the View Selector and have deleted the views you don't actually need, you can create your new view.

Procedure

1. Click the **New View** button  in the Views pane in the lower-left corner of the screen.
2. Navigate to **Other Views >** and select **View Selector** .



The **View Selector** screen is fairly straightforward. First, add and format a caption.

3. Enter a **Caption** such as **Select a View:**
4. Click the **Format Caption** button that's just to the right of the Caption field. You're adding the formatting here to make the View Selector drop-down menu a bit more obvious to the average user.
5. Add a **background color**. A suggested color would be **#EBEAD5**. That's a background color that is used by the system throughout Analytics.

6. Click the **Additional Formatting Options** section of the Format Caption screen and enter the following to add a bit of space around the caption:

Additional Formatting Options

Width <input style="width: 50px;" type="text" value="50%"/>	Height <input style="width: 50px;" type="text"/>
Indent (Left Padding) <input style="width: 50px;" type="text" value="10"/>	Right Padding <input style="width: 50px;" type="text" value="10"/>
Top Padding <input style="width: 50px;" type="text" value="2"/>	Bottom Padding <input style="width: 50px;" type="text" value="2"/>

7. Click **OK** when you're done.
8. Now move the two renamed pivot tables and the graph from the **Available Views** field into the **Views Included** field.
 - a. Select the **Summary PCard Data** pivot table and click the **Move Right** arrow to move it into the Available Views field.
 - b. **Repeat** the process for the **Summary PCard Graph** and **Detailed PCard Data** views.
9. Use the **Move Up** and **Move Down** buttons to rearrange the order of the views, if desired.
10. Click the **Done** button in the upper-right corner of the screen when you're finished.

Adding the View Selector

Your new View Selector has been created, but it hasn't yet been added to the analysis.

Procedure

1. **Select and hold** the **View Selector** in the Views pane.
2. **Drag** the View Selector into the **Compound Layout** pane and place it immediately below the **Title** view. You'll see a dark blue line under the Title view when you have the View Selector in the correct location.
3. **Drop** the View Selector.

Removing the Duplicate Views

Now that you've moved the new View Selector into the analysis, it's apparent that you no longer need the new views in the compound layout pane. Be careful how you remove them, however. You don't want to actually delete them. You just want to not see them in the analysis.

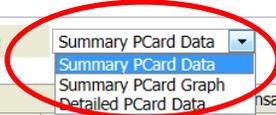
Procedure

1. In the **Compound Layout** pane, locate the **Summary PCard Data** pivot table.
2. **Click the Remove View from Compound Layout** button  in the upper-right corner of the pivot table. The view will be removed from the Compound Layout pane, but will not be deleted from the analysis.
3. **Repeat** the process for the graph and the remaining pivot table.
4. **Save** the analysis.

You should be left with the **Title View**, the **View Selector**, the **Selection Steps** view, and the **Filters** view in the analysis.

The View Selector includes a drop-down menu with which the user can select the view of the data they wish to see. You can turn back to page 2 to remind yourself of how this analysis looked before you added the View Selector and removed the other views from the Compound Layout screen.

Departmental PCard Analysis
for FEB. 2014

Select a View: 

Account No	PCard No	Cardholder	Monthly Spend Limit	Monthly Trans Limit	Transaction Total	Percent	Transaction Count
1142110	5653	BEGAY, BERNARD	30000	150	4,469.93	24.9%	12
1144020	9662	ROMAN, PAMELA	15000	999	302.07	1.7%	3
1144030	9691	COMPUTING, STUDENT	35000	300	290.67	1.6%	2
1144050	9149	COOLEY, MELANIE	3000	30	39.28	0.2%	2
1192600	1129	CATTEN, DEBRA	50000	400	1,667.18	9.3%	9
	2107	LLOYD, CARLA	50000	300	6,161.12	34.3%	8
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	5766	LARSON, SHAWNA	50000	250	1,955.55	10.9%	11
1645000	8033	SWANSON, SARAH	50000	200	97.13	0.5%	1
	3765	VILLALOBOS, MIRIAM I	50000	400	89.25	0.5%	1
	7770	PEREZ, EVANGELINA	50000	400	303.79	1.7%	2
Grand Total					17,936.31	100.0%	54

Analysis contains no Selection Steps

College Name is equal to **CHIEF INFORMATION OFFICER DIVISION, Chief Information Officer Div**
 or Organization-Code is equal to **9305, 9501**
 and Post Date is between **TIMESTAMP '2014-02-01 00:00:00'** and **TIMESTAMP '2014-02-28 00:00:00'**

Deconstructing a View Selector

Sometimes you don't need to create a view selector as much as you need to tear one apart that's already been created. This is easier than it sounds, and nearly as easy as actually creating a view selector.

One situation in which you might want to deconstruct a view selector is when you've "stolen" an analysis from a shared University-level dashboard. Often, you might want to put a simplified version of that analysis on your own personal dashboard or on your department- or college-level dashboard. You don't need the view selector.

Stealing the Analysis

First you have to steal the analysis. For this example, and the remainder of this section of the booklet, we'll use the **Current Account Balances** analysis from the **Financial > General – Financial Management > Current Account Balances** dashboard page.

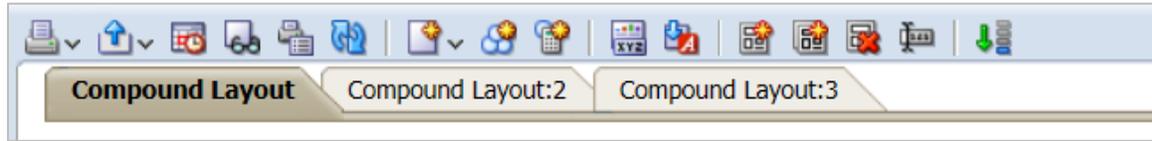
Procedure

1. **Navigate** to the dashboard that contains the analysis you wish to steal.
2. Using the dashboard prompt fields, **filter** the dashboard page to get the data you need.
3. **Modify** the report as desired to make it look the way you wish to see it.
4. **Click** the **Analyze** link below the analysis. A copy of the analysis will open in edit mode in Analytics. You've just "stolen" the report.
 - a. If there is no Analyze link, you won't be able to get a copy of the report using this method.
5. **Click** the **Save As** button and save the analysis into your own personal folder or into a shared department- or college-level folder, as appropriate for your use.

Planning Your Moves

As you do in life, it's nearly always best to plan your moves before you start making changes. That certainly applies here.

The copy of the **Current Account Balances** analysis you stole appears to be horrendously complex. That's because it is. Your goal here is to simplify it to make it more user-friendly.



There are three **Compound Layout** tabs in this analysis. Each of those three tabs contains or includes multiple views. All told, there are 39 – yes, thirty-nine! – distinct, separate views available to be used among those three Compound Layout tabs.

Your first task is to click and scroll through those three tabs and determine which view or views you actually want to keep. Very often, there is only one particular view that you need, and for which you stole this analysis in the first place.

For purposes of this booklet, we'll select the report that's available on the first Compound Layout tab.

Deleting Unwanted or Unneeded Compound Layout Tabs

Now that you've identified that you wish to retain the original Compound Layout tab, you can get rid of the other two tabs.

Procedure

1. Click the **Compound Layout:2** tab.
2. Click the **Delete Compound Layout** button  on the Compound Layout button bar to permanently delete the unneeded tab.
3. **Repeat** the steps for Compound Layout:3.

Modify Compound Layout

The analysis on the Compound Layout tab includes a view selector. As you browse through the view selector options, you decide to keep just one of the eight individual available views. For our purposes, we'll select the **Detail by Account Number** view.

Procedure

1. **Scroll** through the **Views** pane and locate the **Detail by Account Number** view.
2. **Drag-and-drop** that view into the **Compound Layout** pane, dropping it between the Title and the View Selector.
3. Once the analysis has refreshed itself, confirm that the view you moved is the view you really want. If so, move on to the next steps. If not, find the correct view and move that into place.
4. **Click** the **Remove View from Compound Layout** button  in the upper-right corner of the View Selector. That view will be removed from the Compound Layout pane, but will not be deleted from the analysis.
5. **Repeat** the process for any other unwanted views. Do not remove the Title, Selection Steps, or Filters views, if they are present. You'll want to keep those.
6. **Save** the analysis.

Clean Up the Views Pane

Now that you have the Compound Layout pane set up the way you want it, it's a good idea to go through the Views pane and remove all of the views you're not using. Mostly this is just to help keep things organized for yourself (and for someone who might come along behind you later on).

You could retain a few of the views, if you think you might want them later on. Otherwise, just start deleting.

Make your plan first; once you delete a view, it's gone for good.

Procedure

1. **Select** the **Table** view in the Views pane.
2. **Click** the **Remove View from Analysis** button  on the Views Pane button bar to permanently delete the unneeded Table view.

Training Guide

Next Steps: View Selectors

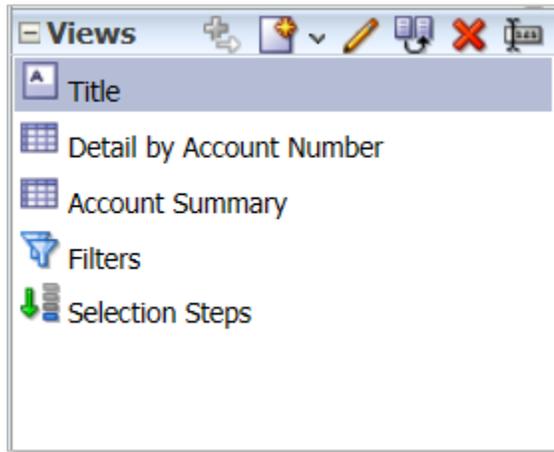


3. **Carefully repeat** the process for all remaining unwanted views.

Do not remove the Title view, the **Detail by Account Number**, Selection Steps, and Filters views and any other views you'd identified as desirable.

If you accidentally remove the Selection Steps or Filters views, they are readily added back into the analysis. The other views would have to be recreated from scratch.

The cleaned-up Views pane:



4. **Save** the analysis.

Creating analyses for personal use, use by one other person, or for general use by your team, department, or college very often requires you add some level of flexibility to your reports. Everyone likes to have their own specific view of the data.

Adding **View Selectors** to your analysis-building repertoire helps you increase that flexibility and adds the usability everyone wants and expects.

